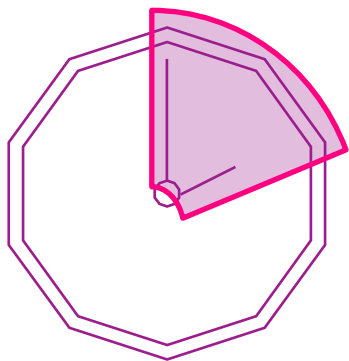
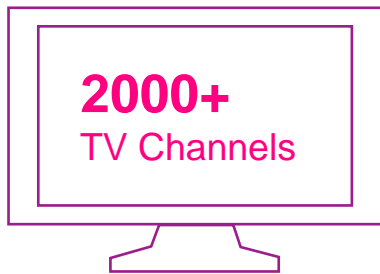


Adding Value

Time Shift Viewing in China

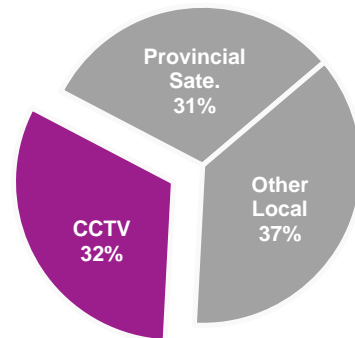
China TV media facts



2.5 Daily
Viewing Hours

1/3 CCTV
viewing share

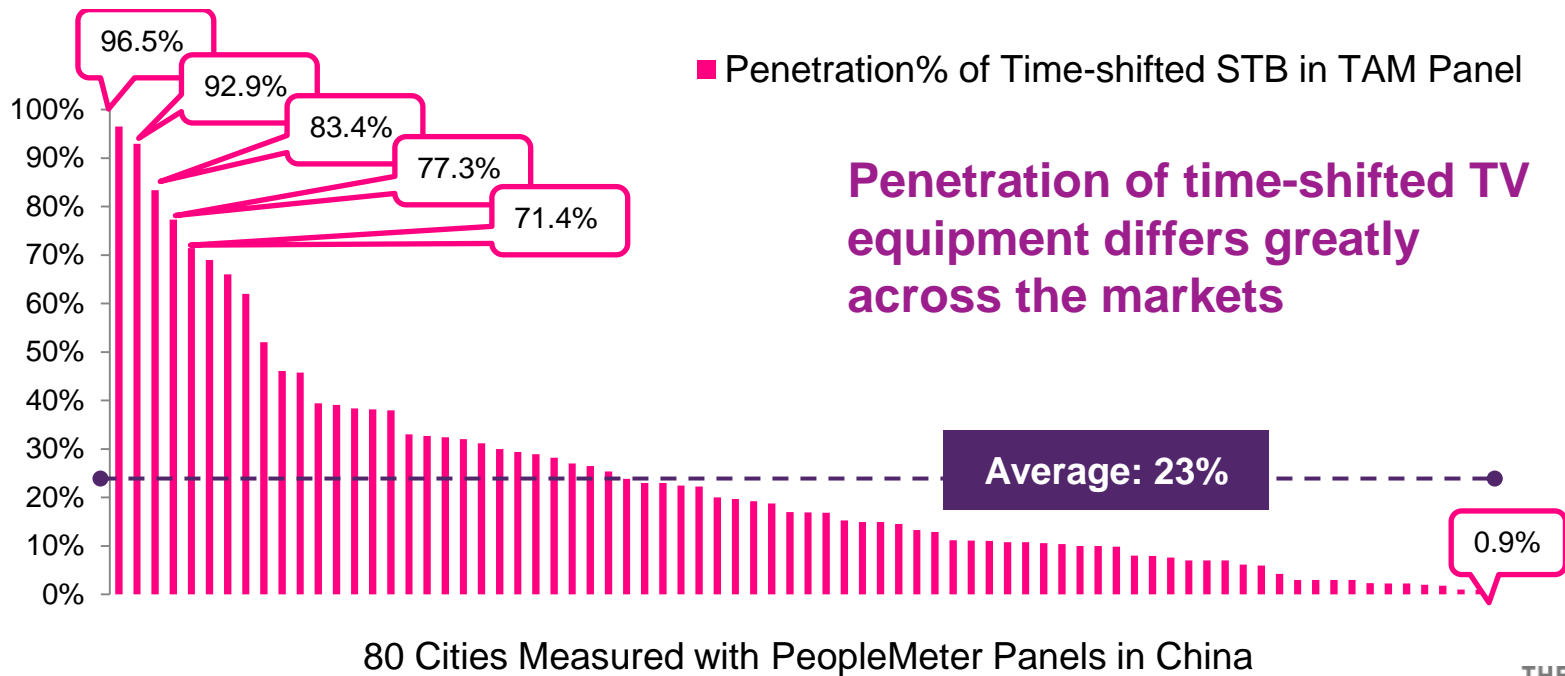
2016 Q1



Source: CSM Media Research, National People Meter Panel / Establishment Survey 2015

Penetration of time-shifted viewing device (STB)

Necessary conditions of time-shifted viewing



Source: CSM Media Research, Mar 2016

Time-shifted viewing scale

Viewer Scale (reach%)

All TV Viewers %



63%
Daily

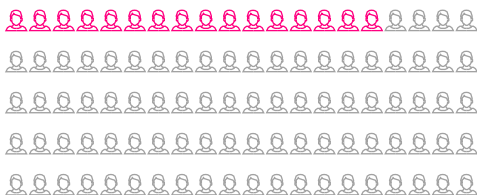
Time-shifted Viewers %



6%



87%
Weekly



16%

Viewing Mins

Total viewing

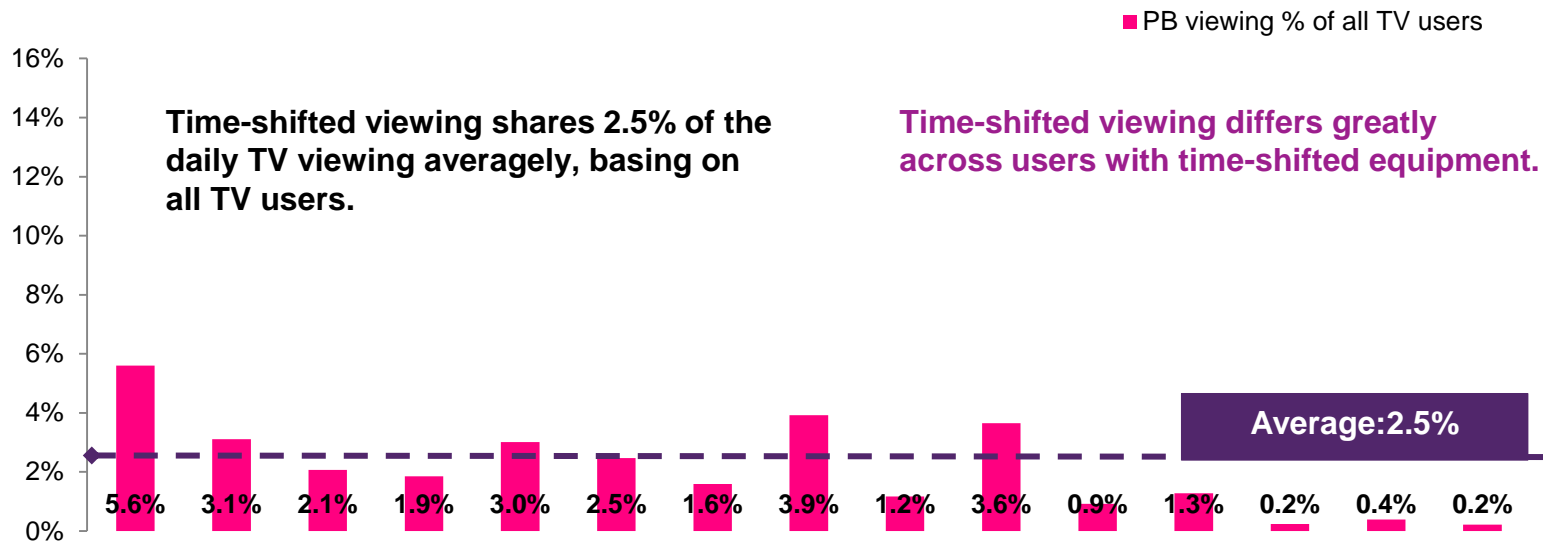


Time-shifted Viewing



Source: CSM Media Research, Jan-Mar 2016, 15 cities

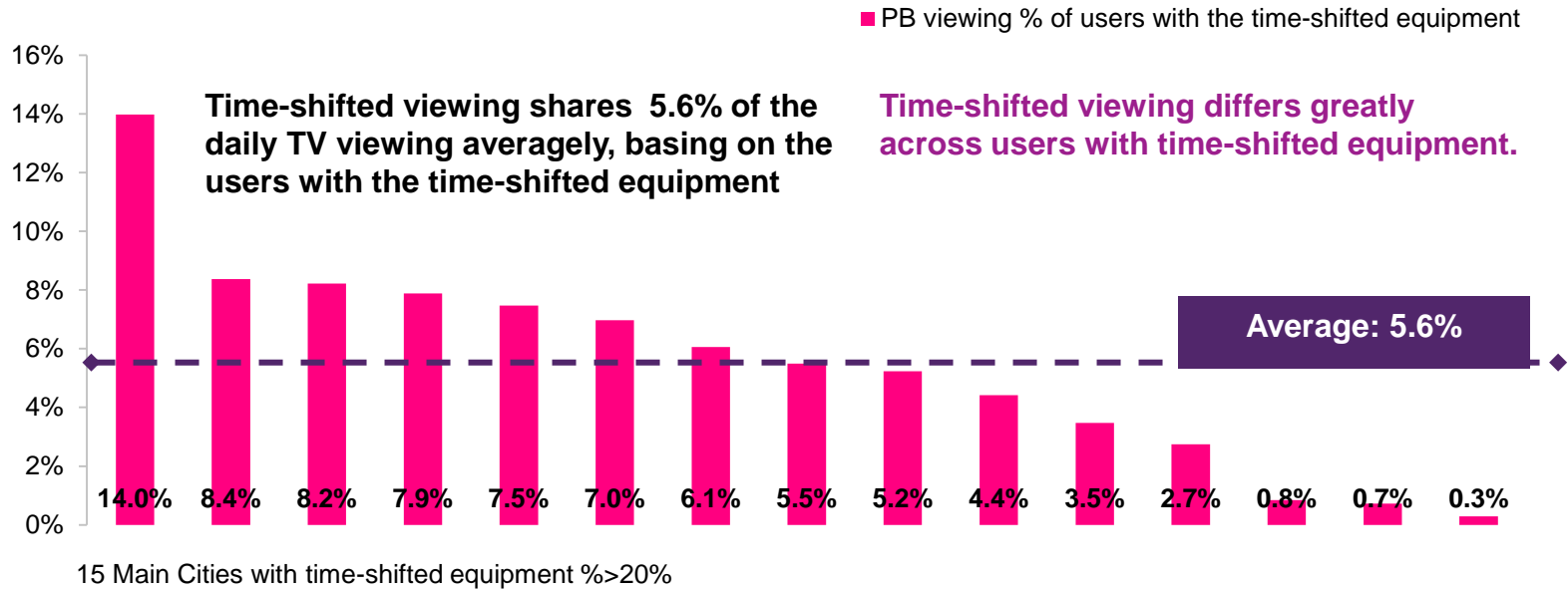
How much? Time-shifted viewing of **all TV users**



15 Main Cities with time-shifted equipment %>20%, 44% in average.

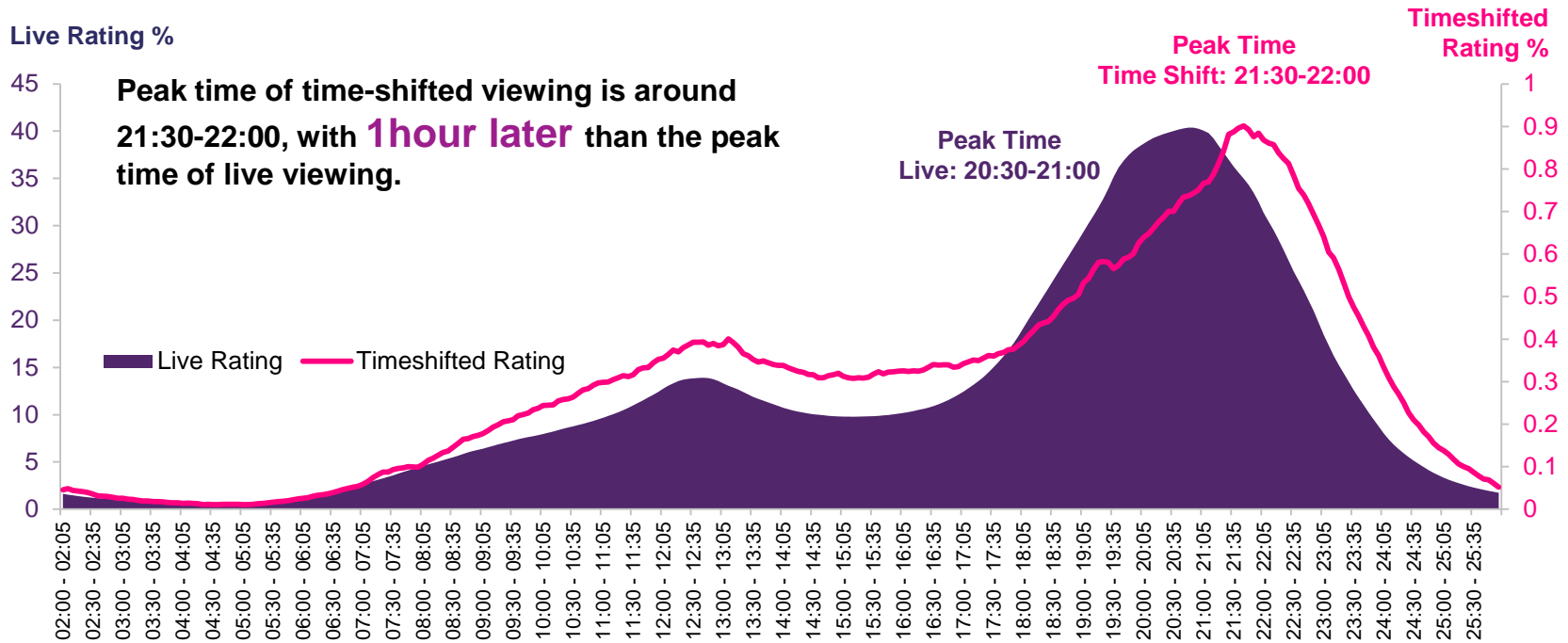
Source: CSM Media Research, Jan-Mar 2016, 15 cities

How much? Time-shifted viewing of users with time-shifted equipment



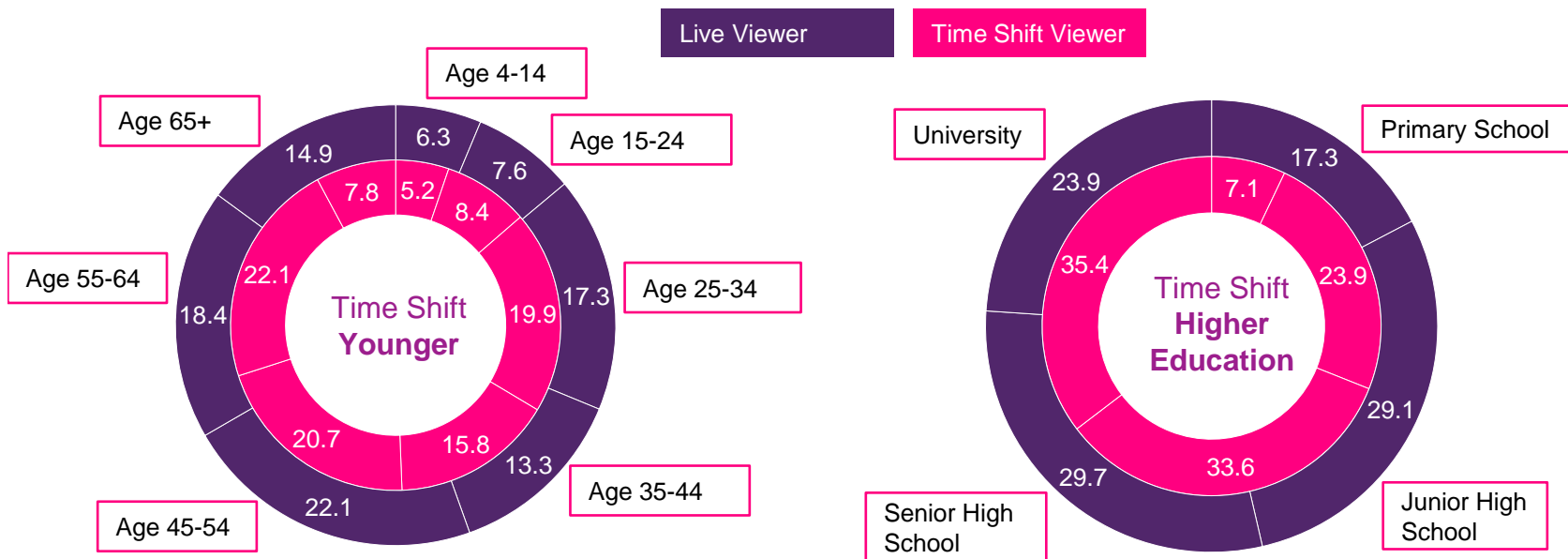
Source: CSM Media Research, Jan-Mar 2016, 15 cities

When? Daypart trend of time-shifted viewing



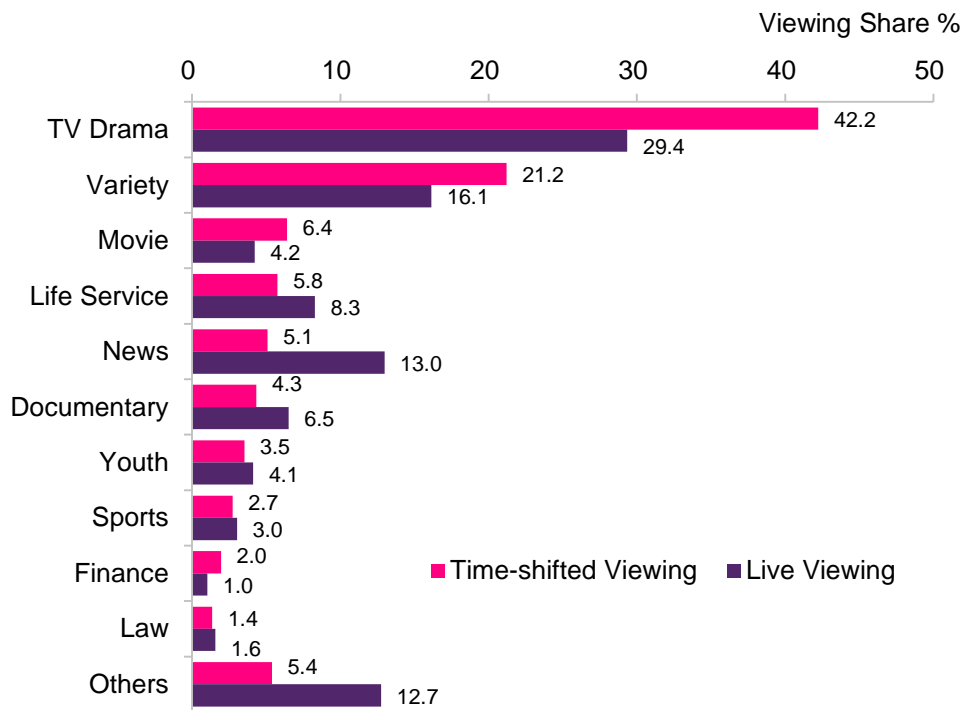
Source: CSM Media Research, Jan-Mar 2016, 15 cities

Who? Audience profile of time-shifted viewing



Source: CSM Media Research, Jan-Mar 2016, 15 cities

What? Programme type preference of time-shifted viewing



When viewers watch playback or VOD, they spend **63% of their time watching TV drama series and variety shows. For live viewing this figure is 45%.**

Movies have a higher viewing share in time-shift, while News programmes have the opposite.

Source: CSM Media Research, Jan-Mar 2016, 15 cities

Time-shift increases program rating: Seasonal entertainment

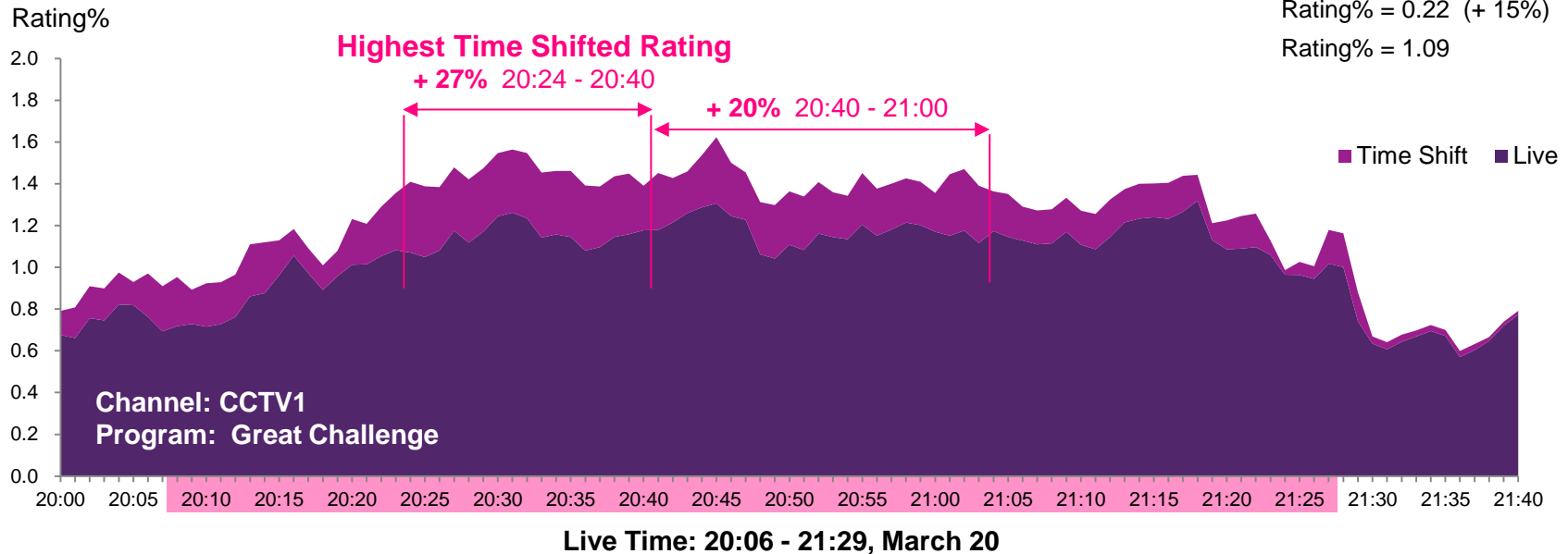
Top programmes with a high time-shifted rating & high live rating

Program Name	Channel	Time Shifted Viewing Increase +%
Great Challenge 了不起的挑战	CCTV1	15.0%
IAMA SINGER 我是歌手	Hunan Sate.	14.7%
Sister Over Flowers 花样姐姐	Dragon TV	14.0%
Top Funny Comedian 欢乐喜剧人	Dragon TV	12.0%
Yi Lu Shang You Ni 一路上有你	Zhejiang Sate.	10.9%
Wang Pai Dui Wang Pai 王牌对王牌	Zhejiang Sate.	9.6%
Super Brain 最强大脑	Jiangsu Sate.	8.8%
24 Hours 二十四小时	Zhejiang Sate.	5.4%
AUV NANA 娜就这么说	Dragon TV	5.3%
The Greatest Love 旋风孝子	Hunan Sate.	5.2%



Source: CSM Media Research, Jan-Mar 2016, 15 cities

Content based time-shifted viewing shows true fans



When viewers play back the program, they can choose to watch the part of programs real attractive, and fast forward the others. Time-shifted rating help the program producers to get more idea of the effectiveness of program content _ to study what kind of content or what element can drive more attention.

CCTV
中国中央电视台

THE
WORLD
AUDIENCES
SUMMIT
2016

Content based time-shifted viewing shows true fans

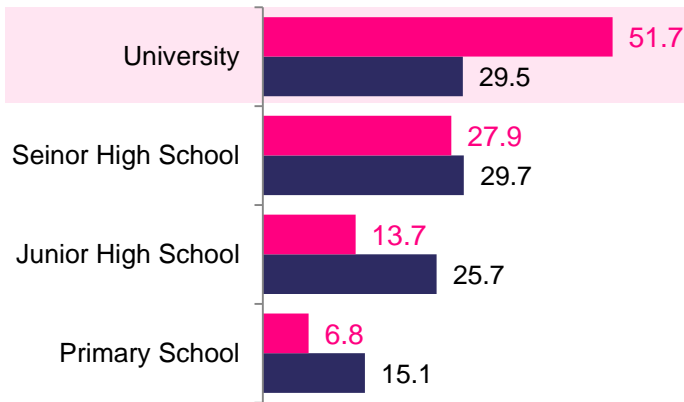
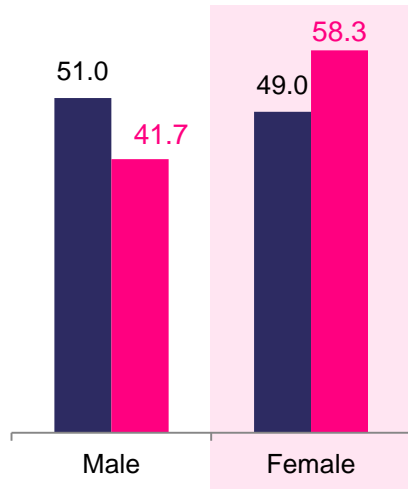
More Active Viewing Demand

More Flexible Interactive Operation

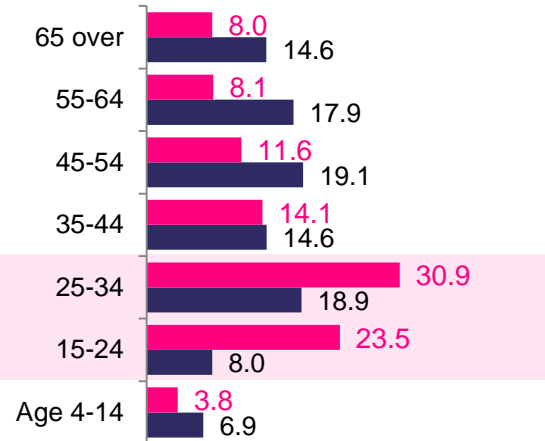
More Passionate Viewer

Female, Young, Higher Education

Audience Profile%



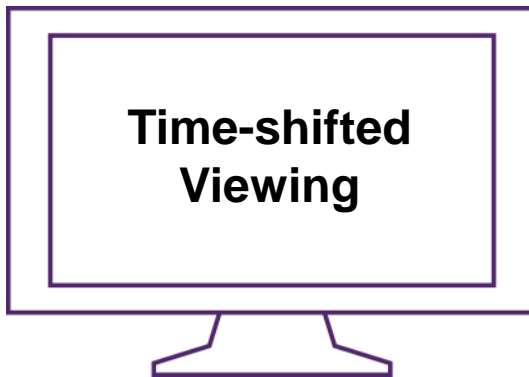
Channel: CCTV 1
Program: Great Challenge



■ Timeshift ■ Live

Source: CSM Media Research, Jan-Mar 2016, 15 cities

Key influential factors of time-shifted viewing



Penetration of the interactive STB and timeshift service user

Timeshift service content provided by the operator

Playback and VOD using habit of users

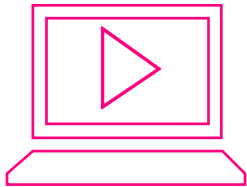
How time-shifted ratings can provide guidance to media and content producers



Innovation



Scheduling



**Cross-media
broadcasting**

Content is the core of time-shifted ratings. It allows audiences to actively choose what to watch and when to watch. Time-shifted ratings provide long-tail viewing trends after initial broadcast. It's the key transition from linear viewing to cross media viewing.

By analyzing time-shifted viewing trends, and audiences' usage of VOD and playback content, it provides beneficial insightful experience for cross media broadcasting.

KANTAR MEDIA

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WORLD
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