

T.A.P. Survey: PVRs

Executive Summary: To get a better feel for the level of knowledge about PVRs and PVR services, In-Stat conducts an annual US-based consumer survey about the topic. The most recent one was conducted in March 2005, when 1,245 members of In-Stat's Technology Adoption panel participated in an on-line survey about the topic.

In-Stat's Technology Adoption Panel is an online panel of more than 12,000 US-based technology users and decision makers interested in contributing their opinions and insights about technology usage and technology issues in the workplace. The panel is comprised of a diverse group of people who represent a wide range of company sizes, industries, and areas of expertise. The diversity of the panel also allows us to gather information on a variety of topics from many different perspectives. Note, however, that since the panel was primarily recruited as a business panel, it is not representative of the overall consumer population in the U.S. In particular, the majority of panelists are male, and tend to be more highly educated, have higher household incomes and be more 'tech-savvy' than the general consumer population.

Key Findings of the Survey

Key findings of our PVR survey include:

- Most panelists are familiar with PVR products and their capabilities. However, these same consumers point to the perceived high cost of a PVR as the reason they do not yet have one in their home.
- TiVo is the most widely used PVR service among the panelists. Forty percent of the respondents with PVRs noted that TiVo provided their service.
- Twenty-six percent of T.A.P. PVR households have more than one installed PVR product.
- An overwhelming number of PVR users stated that they had no interest in giving up their ability to skip or fast-forward through commercials, even if it reduced their PVR service costs.
- PVR users are highly satisfied with their PVR service. Eighty-nine percent stated they were either "extremely satisfied" or "very satisfied" with their PVR service.

A specific question that we asked the panel was to identify their PVR service provider. The results of that question are listed on the following page.

What Company Provides Your PVR Service?

In terms of the actual PVR service provider, TiVo is the largest by far with almost 40% of the respondents identifying it as their PVR service provider. EchoStar finished in the number two spot, followed by Time Warner Cable and Comcast.

It is interesting to note that Microsoft's UltimateTV service still has a base of subscribers even though it has not been available to new DirecTV subscribers for almost three years.

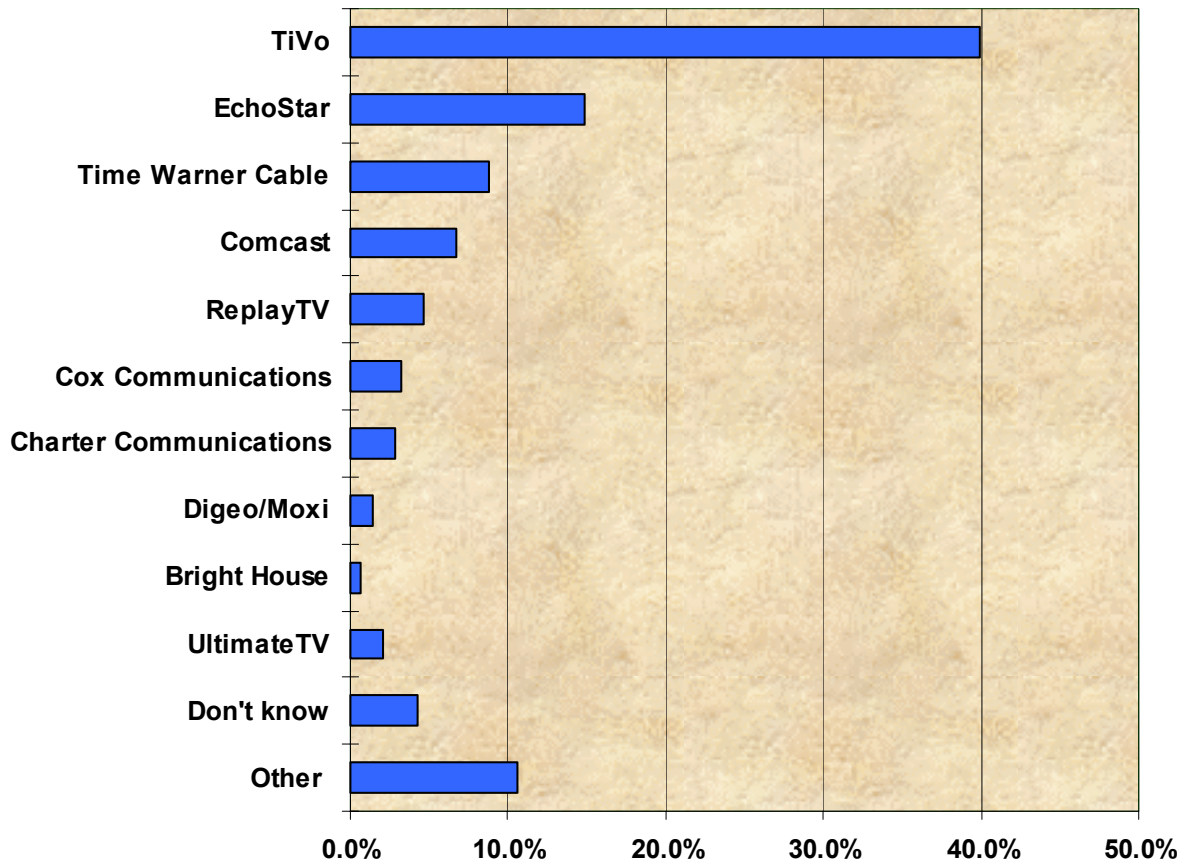
Table 1: What Company Provides Your PVR Service?

Company that provides PVR service	% of Respondents	# of Respondents
TiVo	39.9%	113
EchoStar	14.8%	42
Time Warner Cable	8.8%	25
Comcast	6.7%	19
ReplayTV	4.6%	13
Cox Communications	3.2%	9
Charter Communications	2.8%	8
Digeo/Moxi	1.4%	4
Bright House	0.7%	2
UltimateTV	2.1%	6
Don't know	4.2%	12
Other	10.6%	30
Total Respondents	100.0%	283

Source: In-Stat, 3/05

Most of the “Other” responses identified smaller cable TV operators like Bresnan Communications and Service Electric as their PVR service provider.

Figure 1: What Company Provides Your PVR Service?



Source: In-Stat, 3/05