

U.S. Consumer Survey: Personal Video Recorders

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 February 2006, when 1,553 members of In-Stat's Technology Adoption panel participated in an on-line survey.

Key Findings of the Survey

Key findings of our PVR survey include:

- Familiarity with PVR products is high. Almost 90% of the survey respondents were familiar with PVR products.
- There is significant demand for “high-end” PVR products. 20% of the respondents paid over \$300 for their PVR product.
- There is a growing number of so-called PVR “power viewers” who are time-shifting almost all of the TV programming that they watch each week. These PVR users may not be watching any “live” or linearly scheduled programming at all.
- There is a growing number of households with multiple PVRs. 34% of US PVR households currently have multiple PVR products.
- End-user satisfaction with PVR service remains extremely high. Based on our survey, 86% of PVR users are either “extremely satisfied” or “very satisfied” with the PVR service.

How Familiar Are You with PVR Products?

The first question we asked of our panel covered basic familiarity with PVR products. Out of the 1,553 panelists that we surveyed, Table 1 shows that almost 90% were either familiar with PVRs or actually had a PVR in their home. This is a very high “Q” score for a relatively new product, and it underlines the fact that PVRs have received a lot of press and consumer attention in recent years.

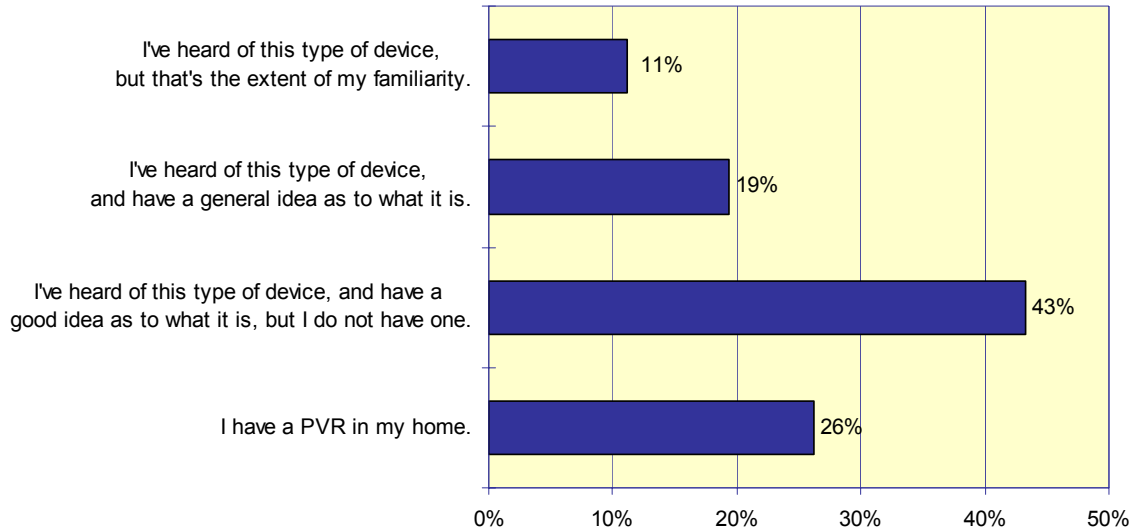
Table 1. How Familiar Are You With PVR Products?

| Familiarity with PVR | % of Respondents | # of Respondents |
|--|------------------|------------------|
| I've heard of this type of device, but that's the extent of my familiarity. | 11.14% | 173 |
| I've heard of this type of device, and have a general idea as to what it is. | 19.38% | 301 |
| I've heard of this type of device, and have a good idea as to what it is, but I do not have one. | 43.34% | 673 |
| I have a PVR in my home. | 26.14% | 406 |
| Total Respondents | 100.00% | 1,553 |

Source: In-Stat, 3/06

Another result from this question was that 26% of the respondents (n = 406) have a PVR in their home. This percentage is just about double the actual US household penetration rate and it highlights the “early adopter” mentality of the panel.

Figure 1. How Familiar Are You with PVR Products?



Source: In-Stat, 3/06

N = 1,553

What is Your Primary Reason For Not Having a PVR?

The next question was directed at the 1,147 survey respondents who did not have a PVR in their home. Of those respondents, approximately one-third stated that they didn't have a PVR because it was too expensive, and another third said they were not interested in recording TV programming.

These two answers, cost and lack of interest, are consistent with the responses from past In-Stat surveys that asked the same question.

Table 2. What is Your Primary Reason for Not Having a PVR?

| Primary Reason for Not Having a PVR | % of Respondents | # of Respondents |
|---|------------------|------------------|
| Too expensive | 31.73% | 364 |
| No interest in recording programs | 31.47% | 361 |
| Don't see the benefits over a VCR | 16.83% | 193 |
| Plan/waiting to get one/Haven't gotten around to it yet | 4.53% | 52 |
| Would not use/No need/No interest/Not a priority | 2.70% | 31 |
| Don't see benefits over other forms of recording | 2.35% | 27 |
| Don't watch TV/No reception or cable | 2.01% | 23 |
| Not familiar enough/Need to research | 1.92% | 22 |
| Financial reasons | 1.74% | 20 |
| Too complicated to use | 1.39% | 16 |
| Watch enough TV/Don't want to watch more TV | 0.44% | 5 |
| Other reason | 2.88% | 33 |
| Total Respondents | 100.00% | 1,147 |

Source: In-Stat, 3/06