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From TV To Online To Mobile Phones: A National Study Of US College Students' Multiplatform Video Use and Satisfaction [Slides]

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FROM TV TO ONLINE TO MOBILE PHONES: A NATIONAL STUDY OF US COLLEGE STUDENTS' MULTIPLATFORM VIDEO USE AND SATISFACTION

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Multi-Platforms for Video Consumption

- Television
- Computers/Online
- I-Pods/MP3 Players
- DVRs
- DVD Players/VCRs
- Cellular Phones

Research Questions

- What are the consumption patterns in various video platforms (online, mobile, DVD players and DVRs)?
- Does online video usage affect usage of other video platforms (TV, DVD, DVR, and video games)?
- Are there any significant gender differences in the consumption of user-generated videos, repurposed and mobile videos?
- How satisfied are the users on the various platforms?

Method

- National survey of college students
- College students have highest usage of cellular phones and the Internet, can serve as barometer for media preference
- Online survey to reach college student Internet users nationally

Sampling

- Six public universities which have e-mail directories available representing 4 of 6 Nielsen market regions in the U.S. were selected
- Sample was randomly drawn from each alphabet based on e-mail directories of each university
- An incentive of drawing for \$25 Amazon.com gift card for responding to the survey

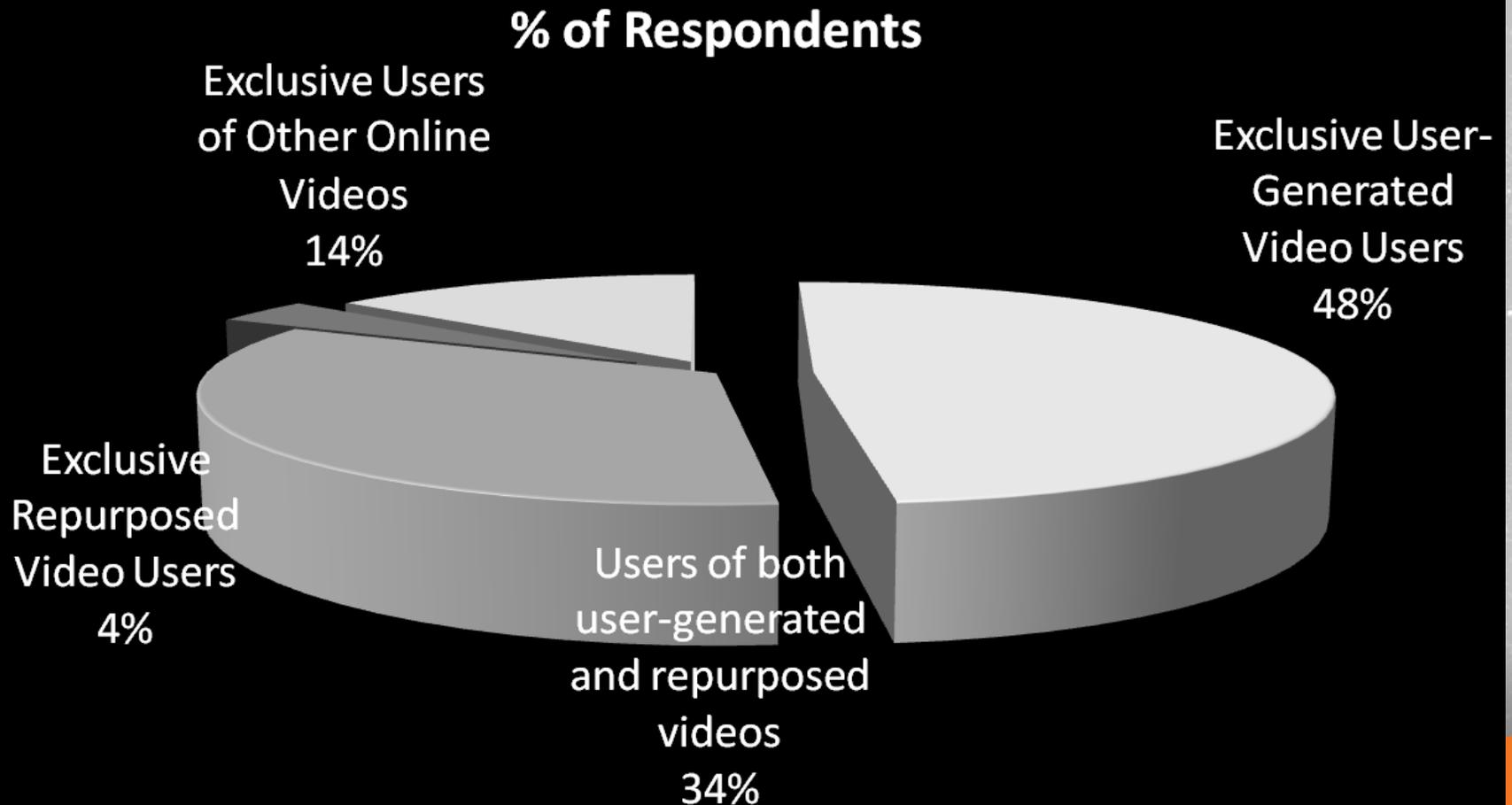
Respondent Profile

- 123 respondents from national survey + 91 extra recruited students in BGSU
- Respondents are heavy users of television and the Internet:
 - 91% watch online video and 22% watch TV more than 16 hours a week
- 97% use broadband connection
- Almost all have cellular phones except 2 respondents
- 47% male respondents, 52 female respondents
- 73% Caucasians, 6.7% African Americans, 7.6% Asians, 4.6% Hispanics

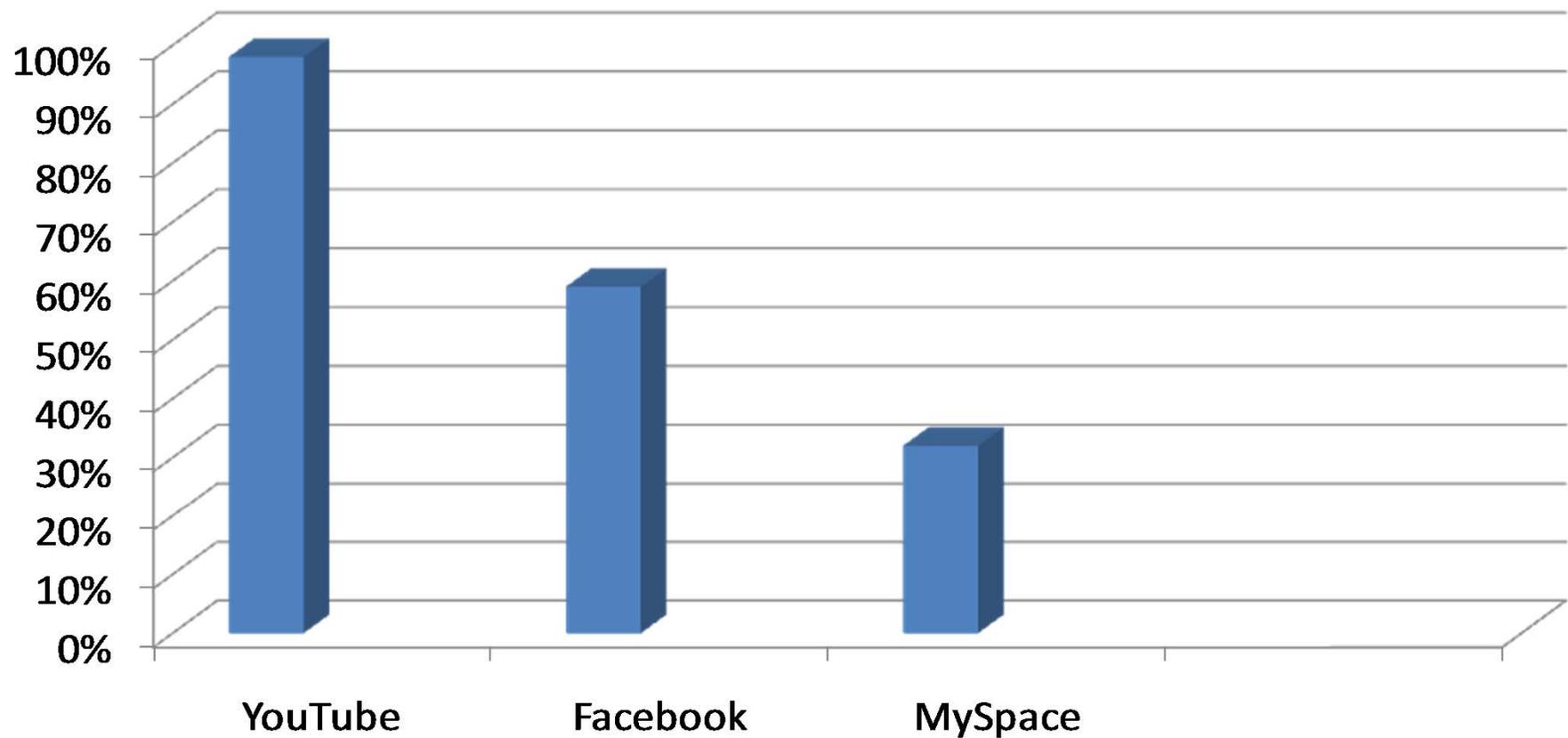
Online Video Consumption

- Early adopters of online videos, almost half (47%) watch online video more than 3 years
- Surfing or just looking around is the common factor for first use of online videos. Peer influence is mentioned by $\frac{1}{4}$ of respondents. Catching a missing show is mentioned by $\frac{1}{5}$ of respondents.
- High frequency of usage: $\frac{1}{5}$ watch online video daily

Online video usage

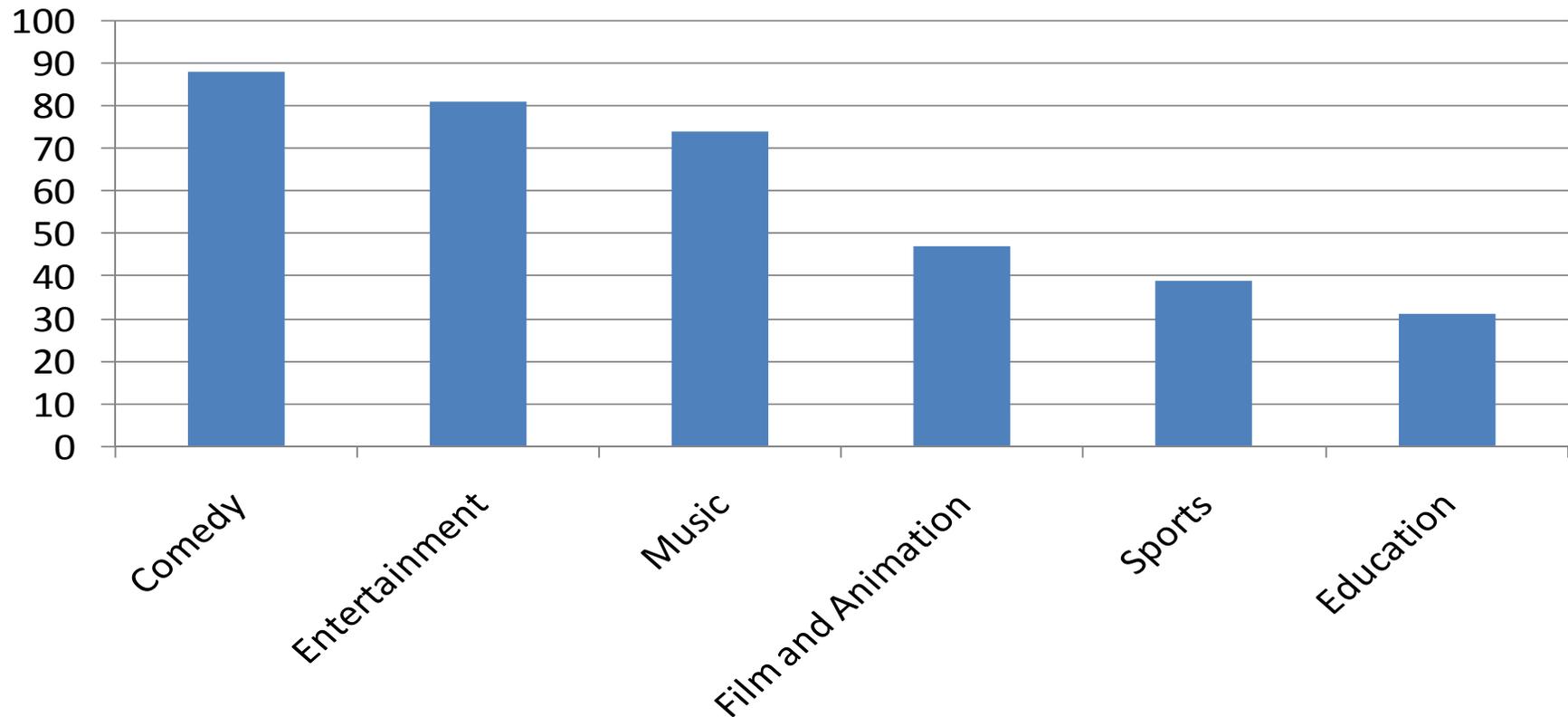


Sources of User-Generated Videos

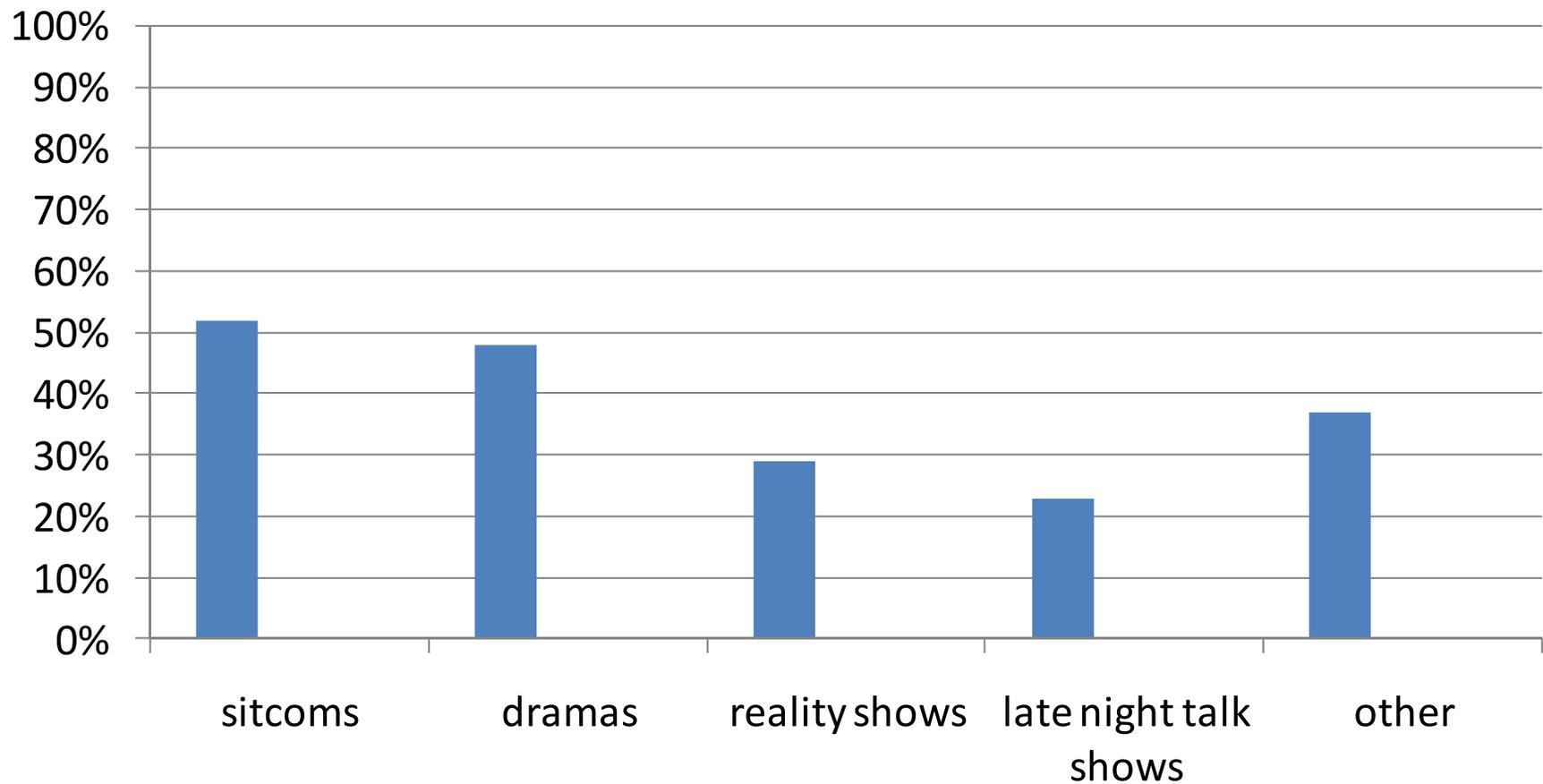


Major User-Generated Content Categories Watched

Percent of Respondents



Most Watched Repurposed Video Content



Reasons for watching online videos

Repurposed videos are not displacing or substituting on air television:

- Catch a missing episode (66%)
- Re-watch the aired episodes (40%)
- Explore new videos not available on TV (36%)
- Submit own videos (20%) and the interactive features for User-generated videos (20%)
- YouTube is dominant source for both user-generated (98%) and repurposed videos (70%).

Mobile Video Use

- 1/7 of respondents ever watched videos on their cellular phones
- 60% of those who watch mobile videos (n=30) on a daily basis have cell phone bills paid by parents

Relationship between usage of different video platforms

- No evidence of media substitution, only complementary consumption
- DVR ownership is positively related to repurposed video usage
- TV usage is significantly positively related to online video usage ($r = 0.2$ for user-generated videos, $r = 0.22$ for repurposed videos)

Gender Difference in Online Video Usage

- Males are more frequent users of online videos than female users(28% vs 11% female watch online videos daily)
- Males are earlier adopters than females in online video and have different preference in online video content from females:
 - Males prefer user-generated videos more.
 - Females prefer repurposed videos more.

Significant Gender Difference in Online Video Content Preference

- The gender difference in television content preference continues online:

User-generated Videos

Males prefer sport, auto and adult videos,
Females prefer pets and animals.

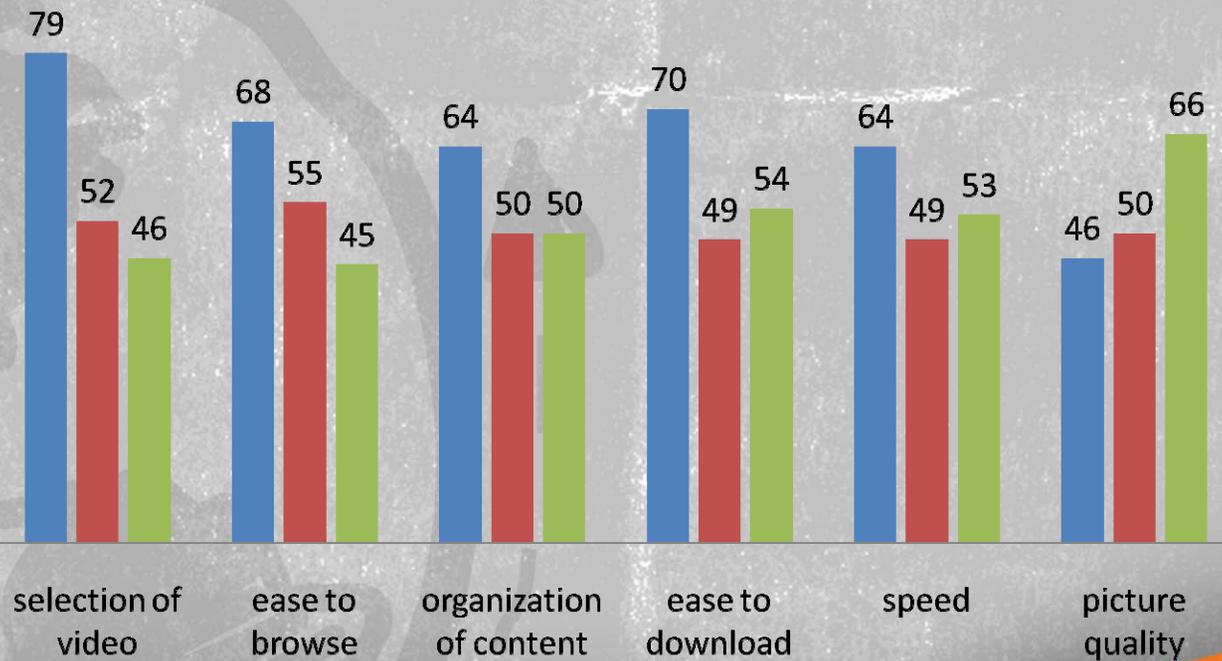
Repurposed Videos

- Females prefer drama, sitcoms, males prefer late night talk shows and more likely to explore new show not yet available on TV

Satisfaction of Video Platforms

Percent of Satisfied Respondents

■ User-Generated ■ Repurposed ■ Mobile



Implications to Programmers

- User-friendly navigation design is important: success of YouTube and high satisfaction in user-generated video sites
- Cross-promote on-air or online videos in user-generated sites with promos and teasers

Implications to Advertisers

- Largest reach in home page of video aggregators and user-generated sites
- Loyal consumers better reached at TV network sites
- Repurposed videos a better platform for finding loyal customers, user-generated videos are good for exploratory customer willing to try a new brand
- High concentration of Asians and African-Americans online video users shows online video is a good platform to reach them

Implications to Audience Measurement

- Existence of exclusive genre viewers and their characteristics may indicate a new way to reach audience not just by size, but by interest and genre
- Complementary cross-platform use is a challenge to measure reach and frequency of a video program over time.