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 ¼ of respondents. Catching a missing show is mentioned by 1/5 of respondents.

• High frequency of usage: 1/5 watch online video daily.
Online video usage

% of Respondents

Exclusive Users of Other Online Videos 14%

Exclusive Repurposed Video Users 4%

Users of both user-generated and repurposed videos 34%

Exclusive User-Generated Video Users 48%
Sources of User-Generated Videos

- YouTube: 100%
- Facebook: 60%
- MySpace: 30%
Major User-Generated Content Categories Watched

Percent of Respondents

- Comedy
- Entertainment
- Music
- Film and Animation
- Sports
- Education
Most Watched Repurposed Video Content

- Sitcoms: 50%
- Dramas: 40%
- Reality Shows: 20%
- Late Night Talk Shows: 10%
- Other: 10%
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

- Selection of video
- Ease to browse
- Organization of content
- Ease to download
- Speed
- Picture quality

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.