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**: User-Generated (79), Repurposed (52), Mobile (46)
- **Ease to Browse**: User-Generated (68), Repurposed (55), Mobile (45)
- **Organization of Content**: User-Generated (64), Repurposed (50), Mobile (50)
- **Ease to Download**: User-Generated (70), Repurposed (49), Mobile (54)
- **Speed**: User-Generated (64), Repurposed (49), Mobile (53)
- **Picture Quality**: User-Generated (46), Repurposed (50), Mobile (66)
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.