

The Changing TV Experience: Attitudes and Usage Across Multiple Screens

April 2015



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Objectives and Methodology

Objectives

- The IAB wanted to benchmark device ownership and usage and to understand how device behaviors and perceptions are affecting or altering the TV viewing experience. Specifically, the objectives included exploration into the impact of multiscreening and connected TV viewing.

Methodology

- Quantitative research was conducted among Adults 18 or older using Vision Critical's Springboard America online panel (fielded Jan 19-21, 2015).
- The sample used from Vision Critical's Springboard America (SBA) online panel was designed to be representative to the US census/online adult over 18 population. Sample size for this research is 651.
- In addition, 13 participants from the online quantitative survey were invited to participate in a 2-day online discussion forum to share their experiences with streaming video content to their TV in comparison to watching regular TV.

Definitions

- Multiscreening refers to using any of the following devices used simultaneously while watching TV: Smartphone (iPhone, Android smartphone or Other smartphone), Tablet (iPad, Android-based tablet, Windows-based tablet, Kindle Fire or Other tablet), Computer (desktop, laptop, netbook).
- Connected TV/device refers to a Connected TV (Smart TV) that can connect to the Internet directly or a device to stream content to TV (Chromecast, Apple TV, Boxee Box, Roku, etc.).

Summary

- **Device Ownership and Usage**

- **Today's consumers own a variety of streaming video-capable screens and they are using these devices more than they did a year ago:**

- Computer and TV ownership are nearly ubiquitous, Smartphone and Tablet ownership are on par – nearly two-thirds of Americans own one and one in three US adults owns a connected TV.
- In addition, nearly 3 in 10 US adults has bought a new smartphone, tablet or connected TV in the past year.
- US adults surveyed say they spend nearly 5 hrs a day on their computer, slightly more than they spend watching TV. The next most used devices are smartphone (3.6 hrs) and connected TV (2.4 hrs).
- 42% of smartphone owners report using their smartphones more; 35% use a tablet or connected TV more and 27% use their computers more than they did a year ago.
- In contrast, 19% of TV viewers report watching **less** TV than they did a year ago.

- **Streaming Video**

- **Most stream monthly:** Three quarters of connected TV/device owners and roughly half of computer, tablet or smartphone owners report streaming online video at least once a month.
- **A sizable portion stream daily:** One-third of connected TV owners stream video to their TV daily. One in four computer owners and one in five smartphone or tablet owners stream video daily.
- **Streaming video has increased across devices:** One in three connected TV owners, one in four smartphone or tablet owners and one in five computer owners have increased their online video streaming from a year ago.

Summary

- **Multiscreening**

- **Multiscreening is the new normal:**

- 78% of US adults who watch TV use another device while watching TV and the smartphone is the predominant second screen: Two in three smartphone owners multiscreen while watching TV; over half of all computer or tablet owners multiscreen

- **Multiscreening is a daily habit and it is growing:**

- 84% of smartphone multiscreeners do so daily, as do 79% of computer multiscreeners and 65% on tablets.
- The rise in multitasking is driven by smartphone and tablet owners: Multiscreening activity has increased for 40% of smartphone multiscreeners, 39% who do so on tablets and 28% on computers.

- **Which screen gets multiscreeners' attention?**

- Smartphone and tablet multiscreeners are more likely to pay attention to the TV (roughly 60:40 split); Computer multiscreeners' focus is half and half.
- Multiscreeners in aggregate report that about one-quarter of their device activities are related to what they're watching.

- **What exactly are multiscreeners doing while watching TV?**

- Browsing the internet is the #1 multiscreening activity across devices and while the top activities are mostly unrelated (social networking, email, gaming and shopping), a portion of multiscreeners' activity is related to the TV show or commercials.
- Top multiscreening activities on smartphones are unrelated leisure but smartphone multiscreeners are more likely to extend the TV viewing experience to their devices. Half of them email, text or IM about the show and roughly one-third socialize or search related to TV commercials.
- Computer multiscreening is mostly utilitarian but some activity is related to TV: Roughly 4 in 10 will search for info about the show or a product advertised.
- Tablet multiscreening is a hybrid mix: Like smartphone use, top activities are unrelated leisure but TV-related multiscreening mirrors that of computer users. Roughly 4 in 10 search, and about one-third socialize or visit sites related to the TV show. 4 in 10 also visit sites or search products related to TV commercials; about 1 in 4 socialize around the ads.

Summary

- **Connected TV**

- Interestingly, about half of consumers state they are less likely to multiscreen while streaming a video to a connected TV than while watching regular TV.
- One in three Americans over the age of 18 owns a connected TV/device daily to stream online video to a TV and one-third of them use it daily.
- **Connected TV owners lead in online streaming frequency:**
 - Three in four stream online video at least once a month
 - They report spending an average of 2.4 hours per day streaming video to their TV, which is slightly longer than DVR owners spend with their DVRs (2.1 hrs)
- **Connected TV owners are also most likely to say they are streaming more now than compared to a year ago:**
 - 35% of connected TV viewers have increased their video streaming on this device.
 - Meanwhile, 19% of TV viewers are watching less TV than they did last year.
 - The increase is mainly driven by the recent purchase of a connected TV/device to stream (50%) followed by being able to control how (40%) and when (38%) to watch video. One in three attribute their increased connected TV streaming to access to or improved video content.
- **Connected TV vs. TV:**
 - 38% of Connected TV owners say at least half of their TV screen time is spent streaming online video to their connected TV
 - Half of connected TV owners consider their viewing experience to be as good as their TV.
 - One quarter find streaming to be a superior experience when compared to their regular/pay TV provider, as it offers users more control, better selection and the convenience to watch based on their schedules.
 - Half prefer to stream video to their connected TV because there are fewer commercials and two in five find those commercials to be less disruptive than regular TV ads.
- **Connected TV content:**
 - Over three-quarters of connected TV users stream Netflix and YouTube video content at least once a month.
 - About half stream TV shows, Amazon Prime and portal videos at least monthly.
 - Original digital video is viewed regularly over connected TVs; over one-third stream webisodes monthly.

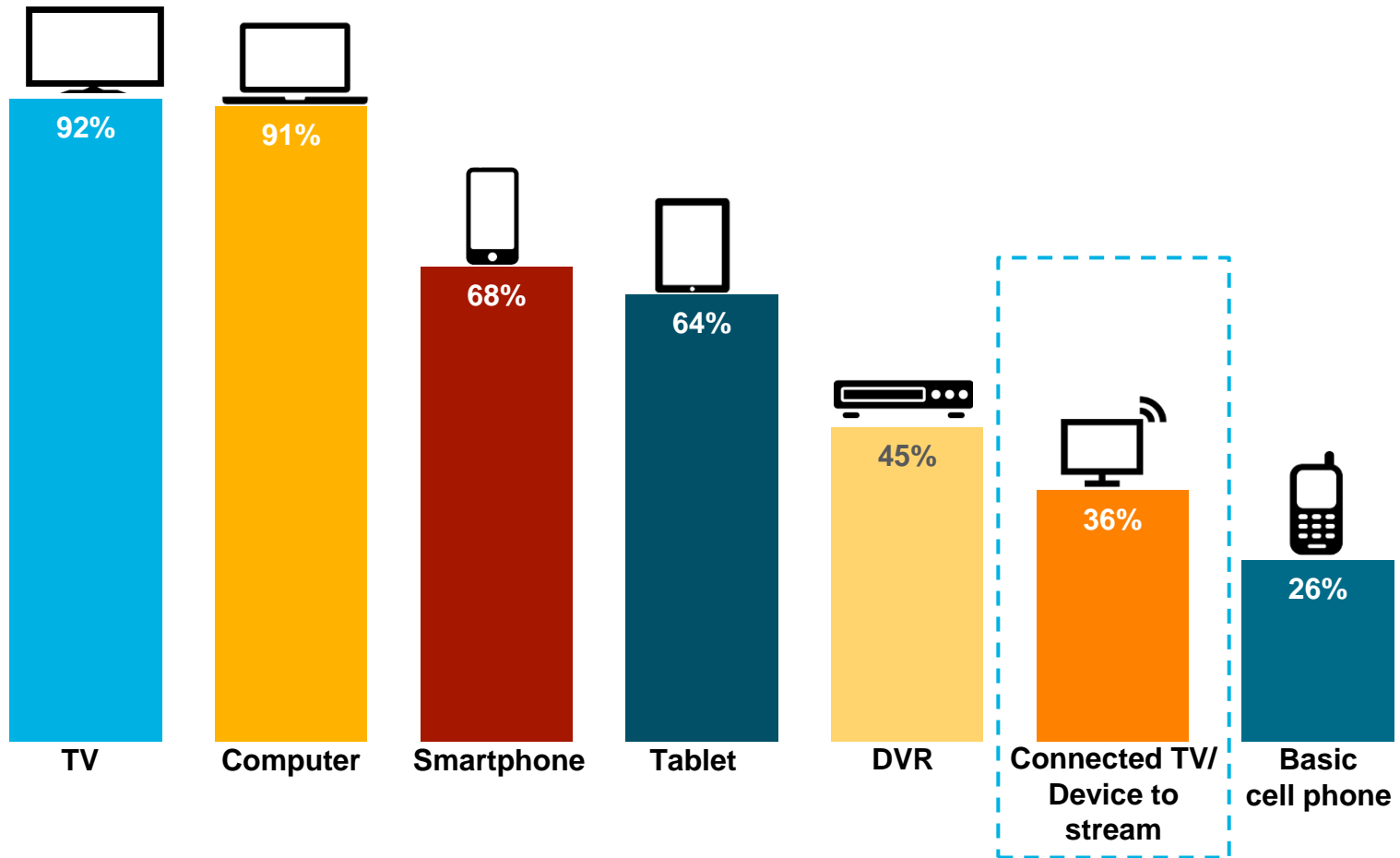
Device Ownership and Usage



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Today's consumers own a variety of screens from which to watch video

- Over one in three US adults owns a connected TV



Q1. Which of the following devices do you personally own?
Base: Adults 18+ who currently own a device (N=651)

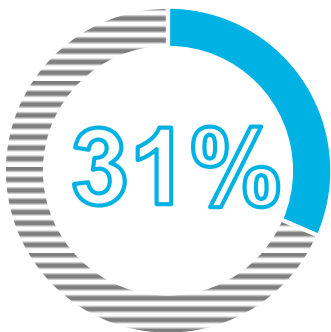
About three in ten US adults have recently purchased a tablet, smartphone or connected TV/device

- Newness has likely contributed to increased connected TV streaming since last year

Devices Purchased in Past 3 Months



Tablet



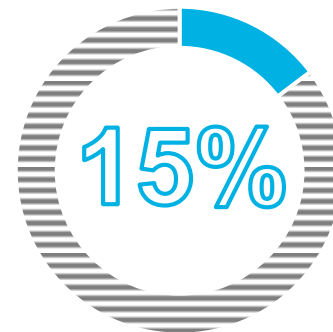
Smartphone



Connected TV/
Device to stream online content



Computer



Television



62%
of those who
use more
connected TV
got it in the
past 3 mos.

Q: Which of the following devices, if any, did you get in the past 3 months?

Base: Adults 18+ who currently own device

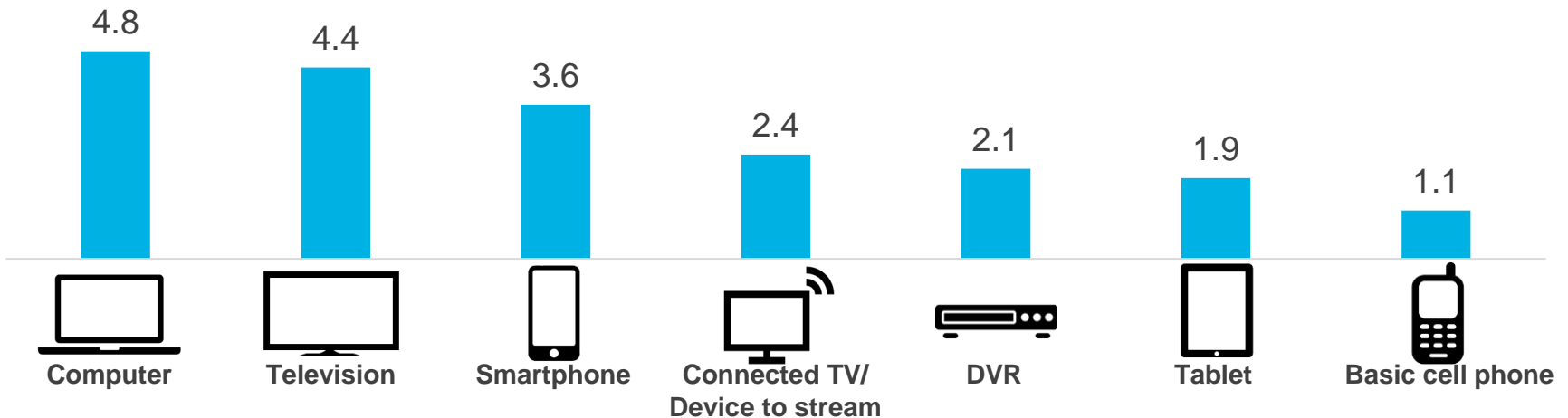
Tablet (N=416); Smartphone (N=441); Connected TV/Device to stream (N=237); Computer (N=592); Television (N=600)

Use connected TV/device more (n=74)

On average, US adults report spending nearly 5 hours using a computer each day, slightly more than they spend watching TV

When asked how many hours they spend on an average day, respondents' perception is that they typically spend more time with a computer than a TV and more time with a connected TV/device than a DVR. Note that there may be duplicated time due to multiscreening and that this refers to a full day which may include work time on a computer.

Time Spent Using Devices Per Day (Hours)



Q: Please indicate how many hours you spend using the following devices on an average day. (Mean summary)

Base: Adults 18+ who currently own device

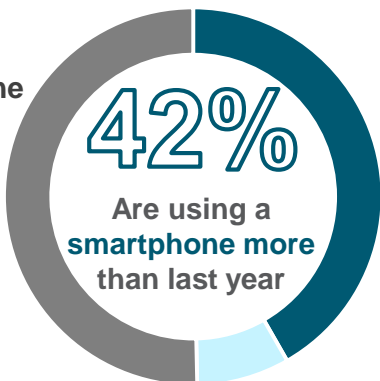
Computer (N=592); Television (N=600); Smartphone (N=441); Connected TV/Device to stream (N=237); DVR (N=294);

Tablet (N=416); Basic cell phone (N=171)

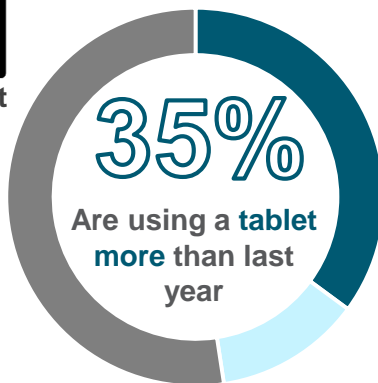
Smartphone, tablet and connected TV/device usage has increased considerably over the past year



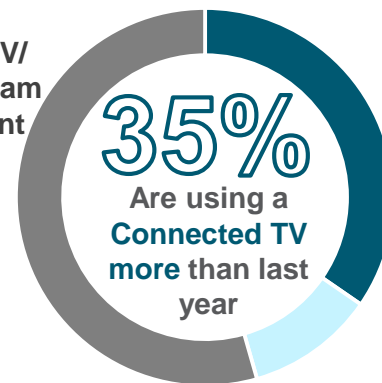
Smartphone



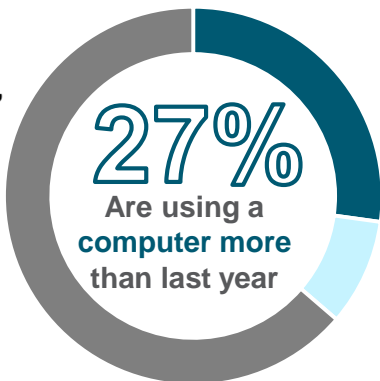
Tablet



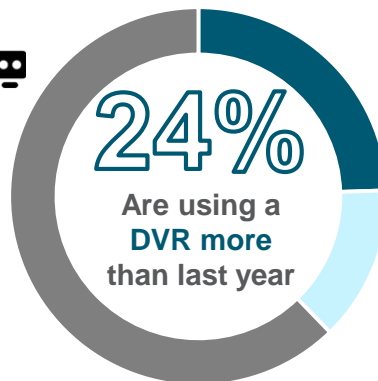
Connected TV/
Device to stream
online content



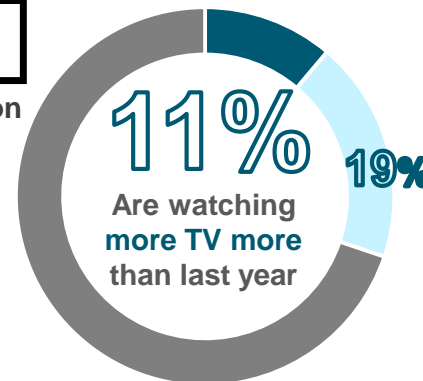
Computer



DVR



Television



■ More ■ Less ■ The same amount

19% are watching less TV than last year

Q: Compared with last year, overall would you say you are using each of these devices less, the same amount or more?

Base: Adults 18+ who currently own device

Smartphone (N=441); Tablet (N=416); Connected TV/Device to stream (N=237); Computer (N=592); DVR (N=294);

Television (N=600)

*Base size < N=100



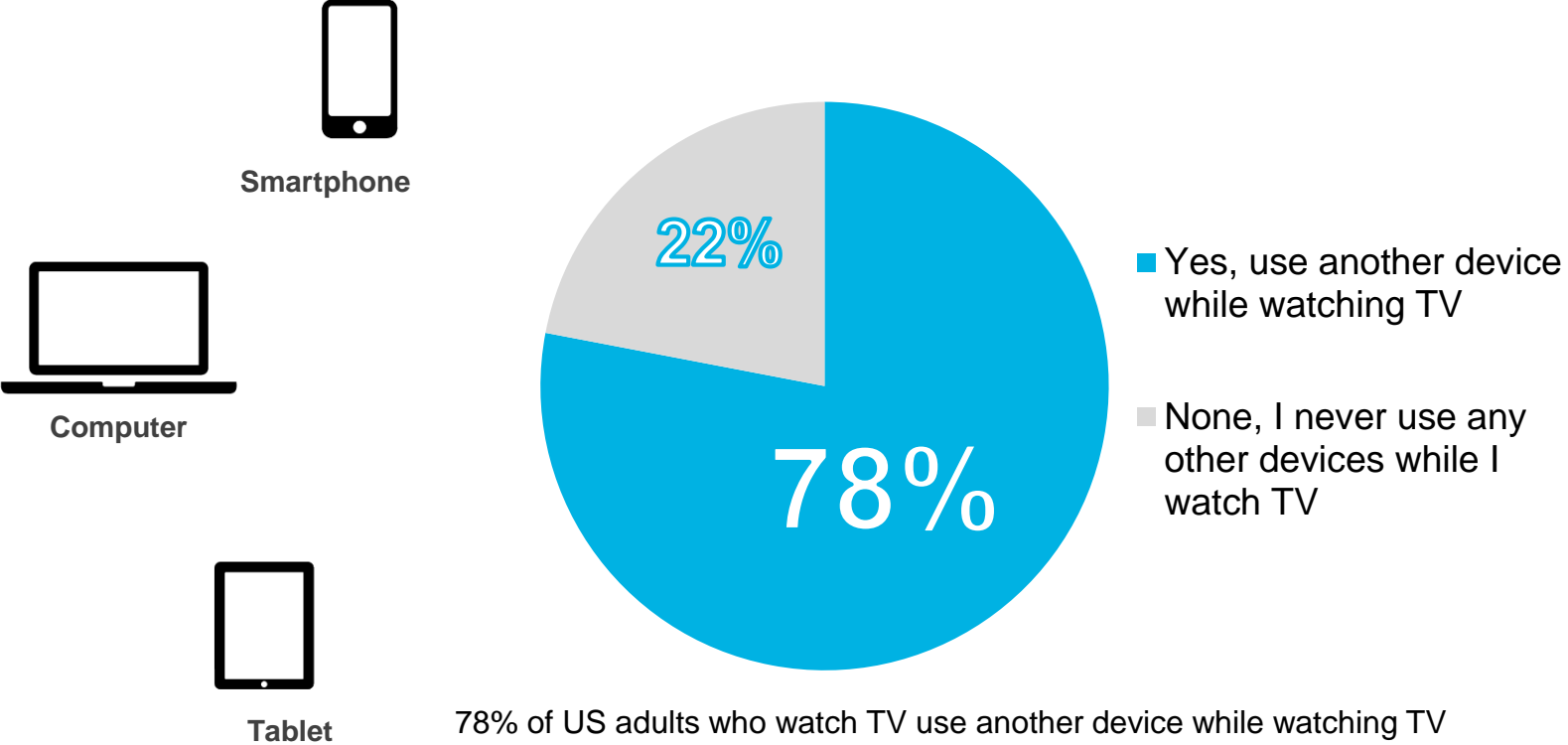
Multitasking Behaviors: How does owning multiple screens affect TV viewing?



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For the majority of the TV viewing audience, watching TV is no longer a standalone experience

Use Another Device While Watching TV

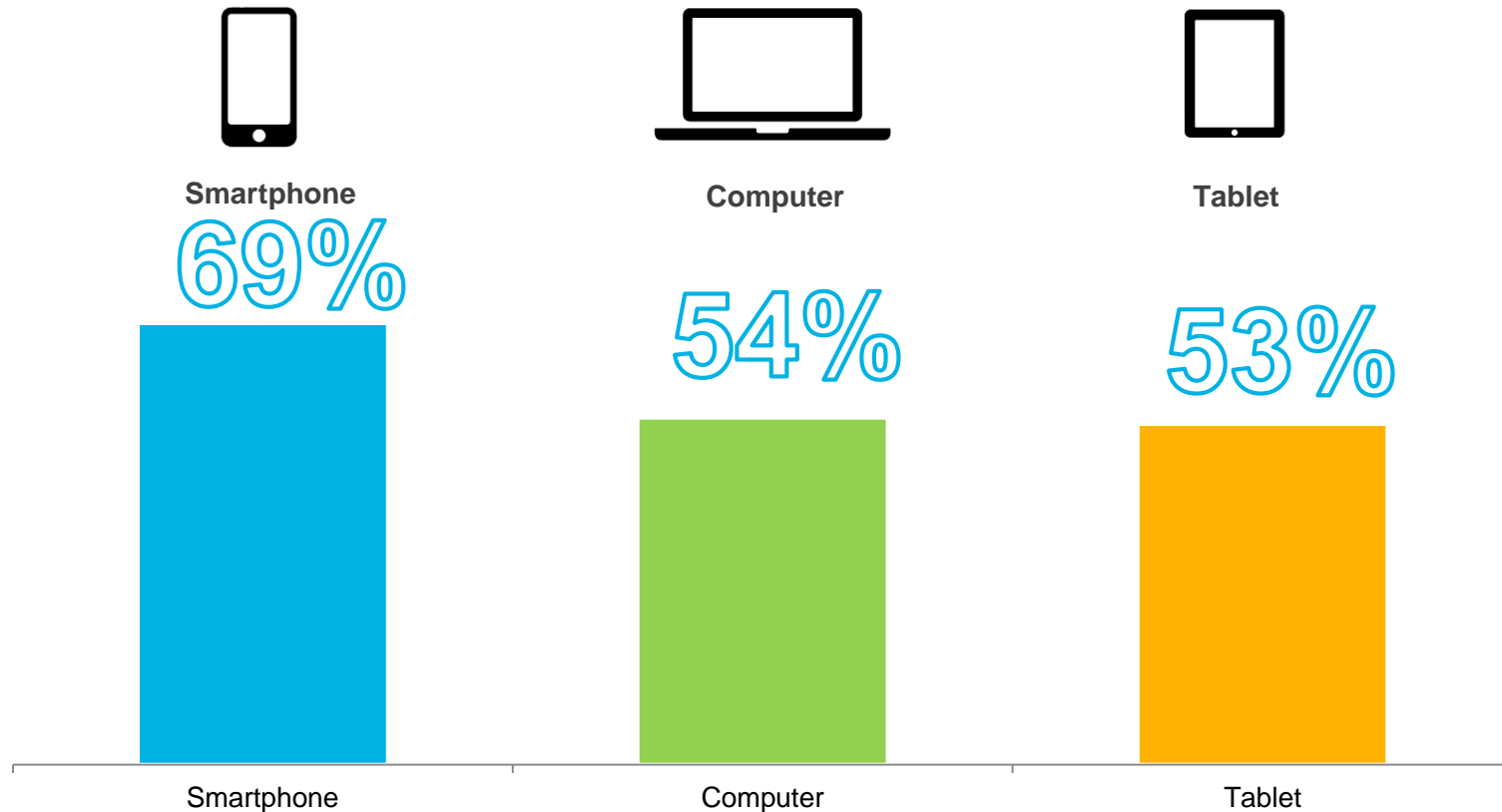


Q: Which of the following devices, if any, do you use simultaneously while watching TV?

Base: Adults 18+ who Use TV (600)

The smartphone is the dominant 'second screen'

Devices Used While Watching TV (Among Device Owners)



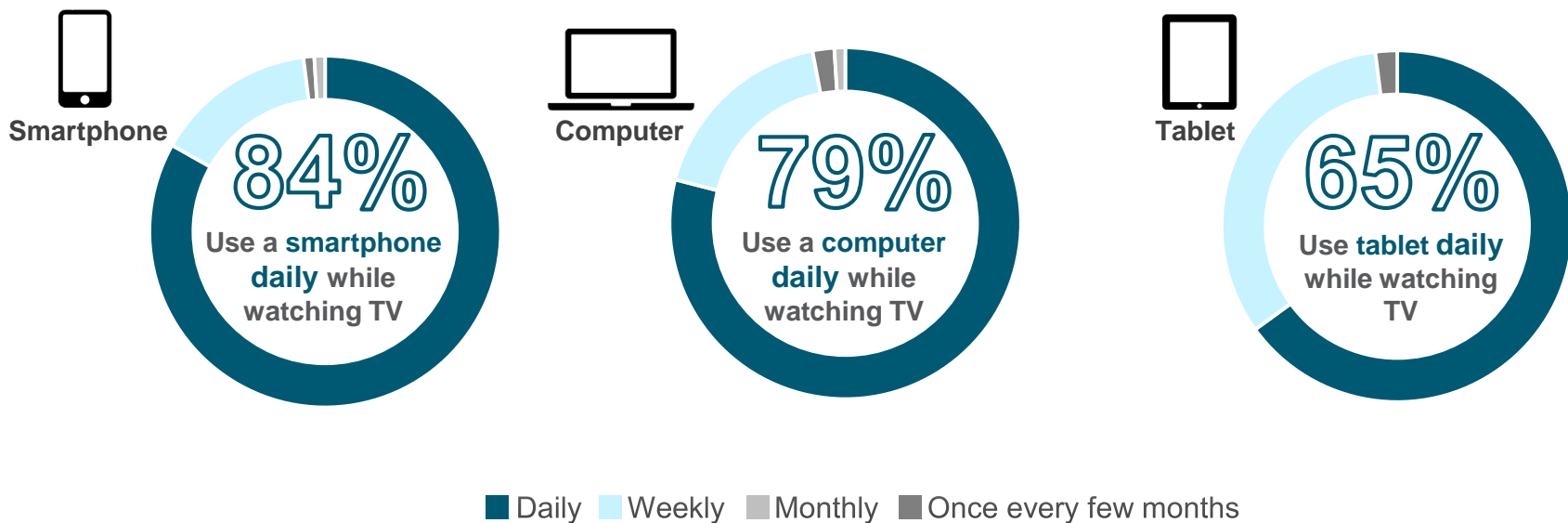
Q: Which of the following devices, if any, do you use simultaneously while watching TV?

Base: Adults 18+ who currently own device

Smartphone (N=441); Computer (N=592); Tablet (N=416)

Multiscreening is a daily habit

Frequency of Using Devices While Watching TV (among multiscreeners)



■ Daily ■ Weekly ■ Monthly ■ Once every few months

Q: How frequently do you use the following devices while you are watching TV?

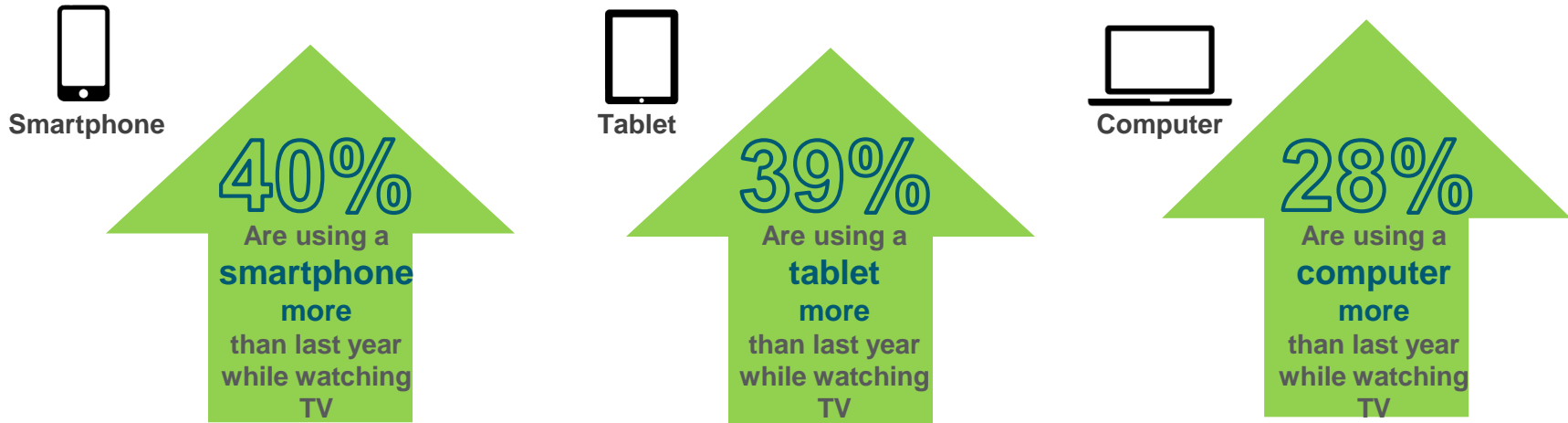
Base: Adults 18+ who use device while watching TV

Smartphone (N=303); Computer (N=317); Tablet (N=221)

*Base size < N=100

Multiscreening is on the rise, especially among those with a smartphone or tablet.

Multitasking While Watching TV Compared to Last Year (among multiscreeners)



TV vs. Connected TV: 45% say they are less likely to multiscreen while streaming a video on connected TV than while watching regular TV

"I don't usually work on the computer if I am streaming to the television. I guess that is because since I went to the effort to stream something, I am more interested in the program, and pay closer attention to it."
– Female, 55-64 yrs. old

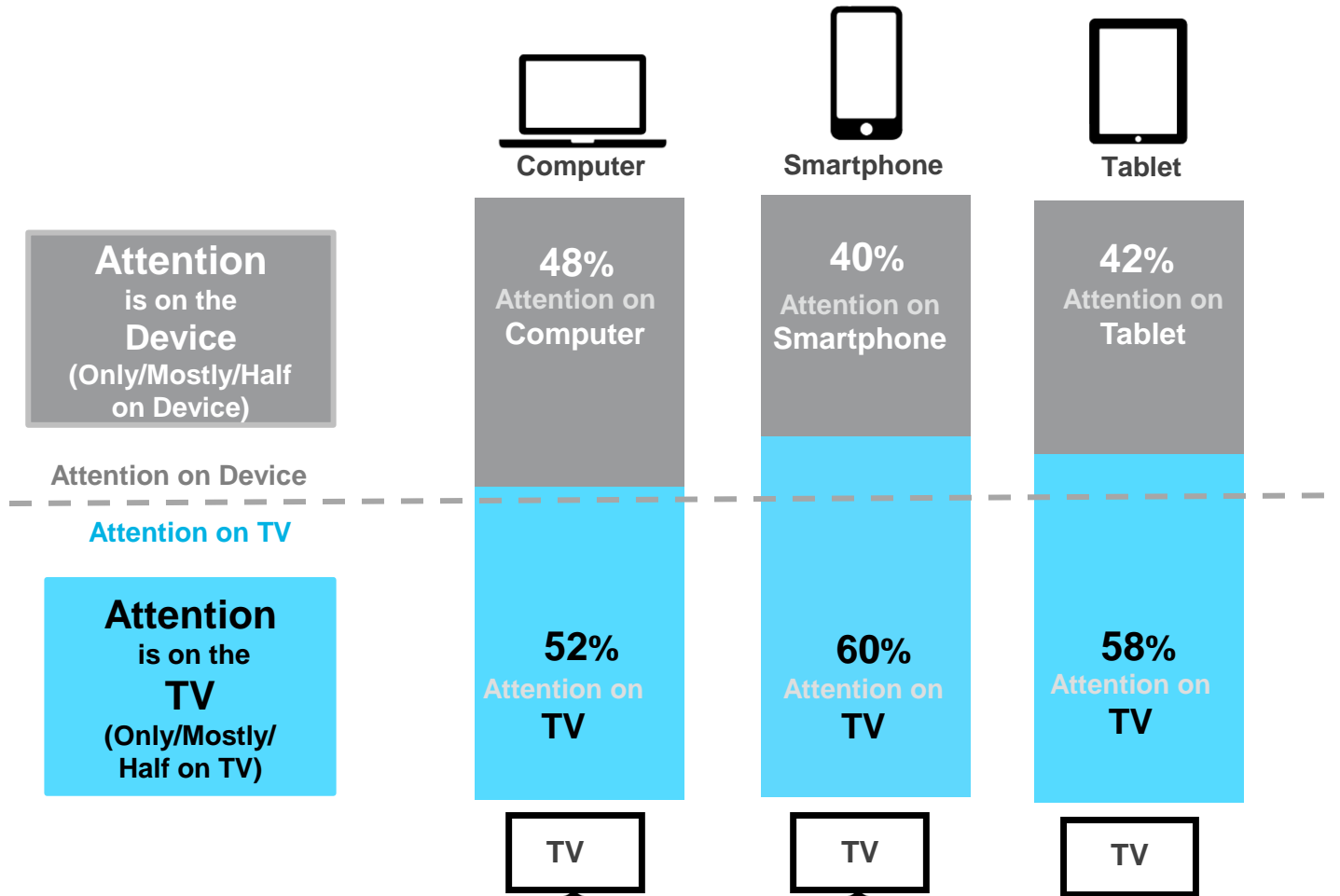
Q: Thinking back to this time last year, would you say you are using each of these devices less, the same amount or more when you are watching TV?

Base: Adults 18+ who use device while watching TV
Smartphone (N=303); Tablet (N=221); Computer (N=317)

Q: How much do you agree or disagree with the following statements? (Top 2 Box Summary)

Base: Adults 18+ who stream online videos to their Connected TV/device to stream "once every few months or more" (N=196)

Smartphone and tablet multiscreeners are more likely to pay attention to the TV; Computer multiscreeners' focus is half and half



Q: When you are watching TV and using another device, how would you describe your level of attention to the TV and/or the device?

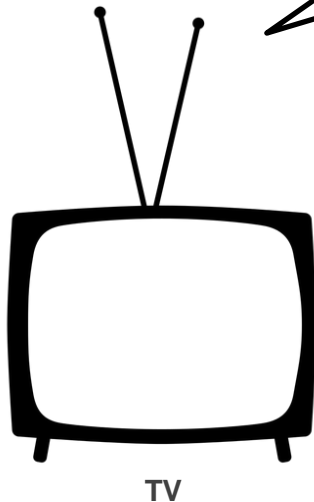
Base: Adults 18+ who use device while watching TV
 Computer (N=317); Smartphone (N=303); Tablet (N=221)

Multiscreening and attention

"I multi-screen when watching children's shows with my daughter, but I'm less likely to do so when watching a thriller or horror movie."
– Male, 25-34



"During an ordinary streaming session where I'm watching a regular TV show I will more than likely be doing something via a mobile device and/or laptop/desktop computer either personal or work related. The only time I won't & dedicate myself fully to the program is for a favorite program or family time."
– Male, 35-44



"If it is something for my daughter I tend to be on my tablet. However if we are watching something as a family or just my husband and I, I usually don't plan to multi-task."
– Female, 25-34

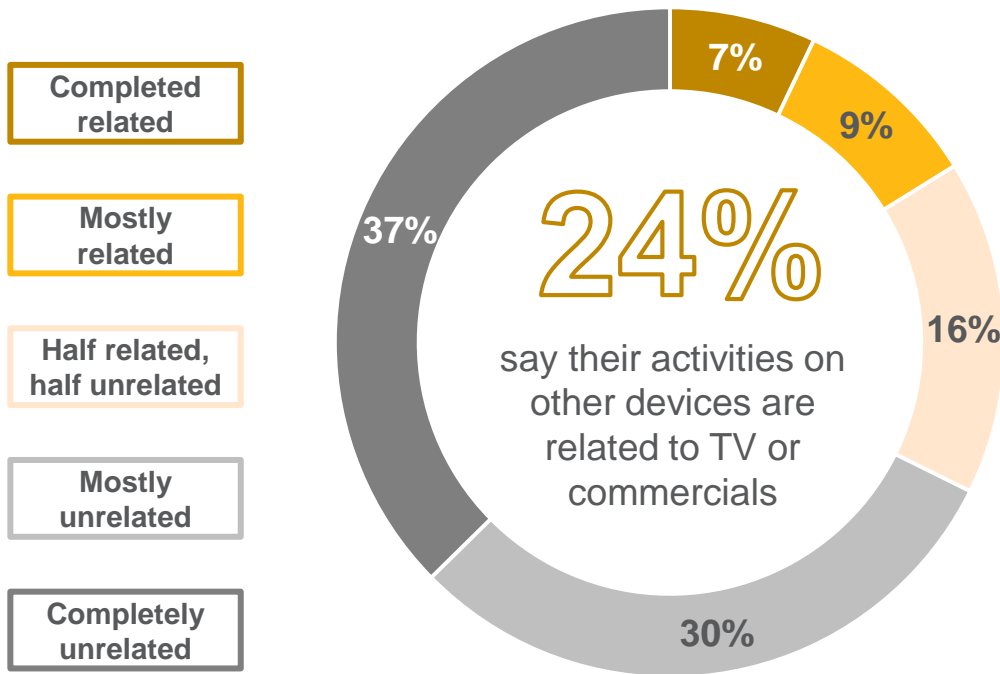
"If I'm watching a soap opera or a comedy I almost always multiscreen. If I'm watching something that I need to pay attention to like Blacklist or Walking Dead, then I don't multiscreen because I want to concentrate on the show."
– Female, 35-44

Discussion Forum: When you are watching TV and using another device, how would you describe your level of attention to the TV and/or the device?

Base: Adults 18+ who use device while watching TV (N= 13)

One quarter believe that their online multitasking behaviors are generally related to TV programs or commercials they are watching

Activities on Other Devices Related to TV or Commercials



- Completed related
- Mostly related
- Half related, half unrelated
- Mostly unrelated
- Completely unrelated



"I've found that some streaming services have started tailoring some of the commercials to the viewer's interests so you're not watching a commercial about a product/service that is of no value/interest."
 – Male, 35-44 yrs. old

"I've even purchased a few products and I believe a service or two via this method. If I'm Googling I'm looking for their website. If I've searched, found their website or went directly to their site I'm usually searching for more detailed product/service information." – Male, 35-44

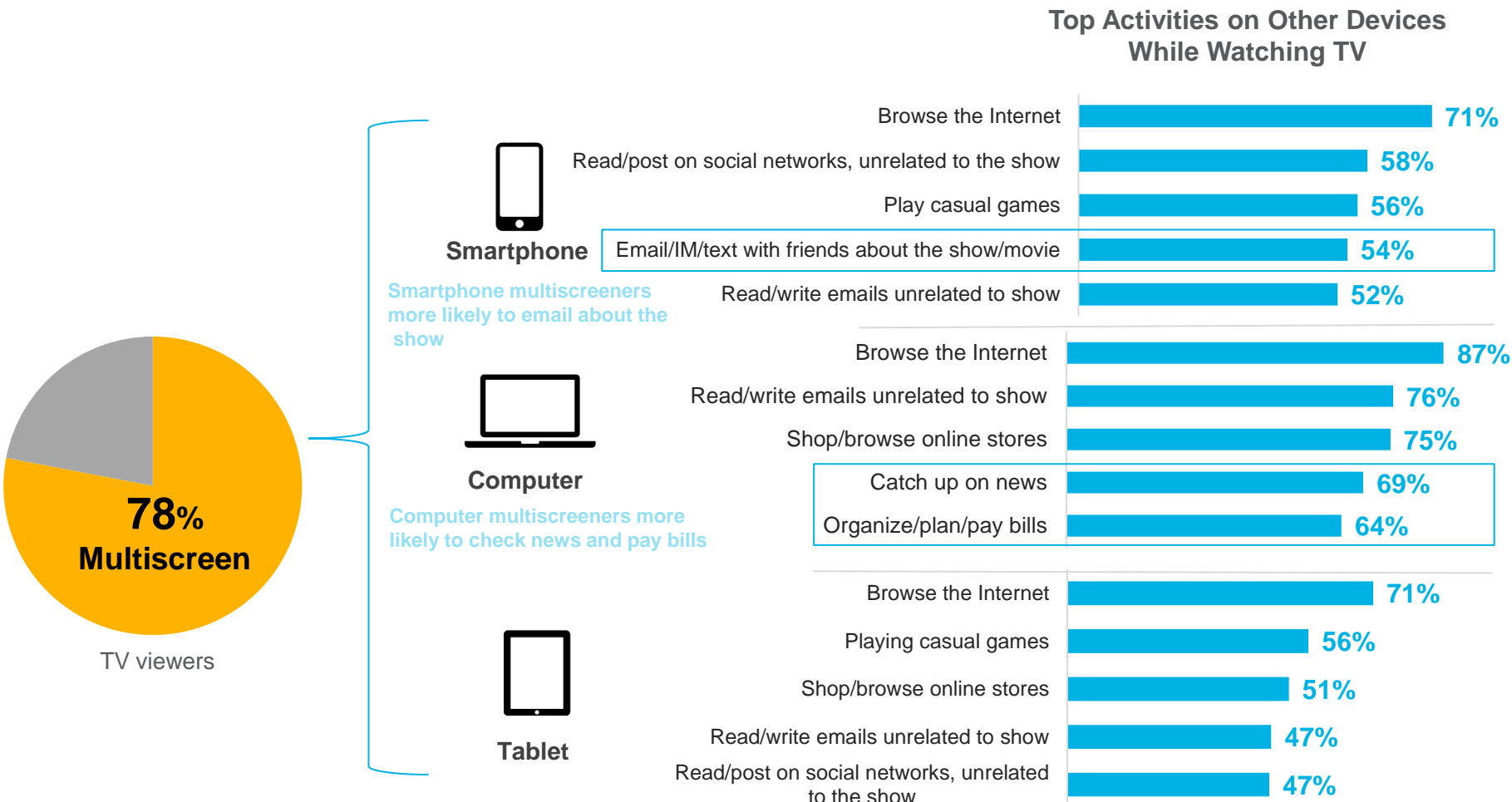


Q: Overall, how would you describe your typical activities on the other device(s) you are using while watching TV? Activities on the other device(s) are ...
 Base: Adults 18+ who multitask while watching TV (N=498)

(24% reflects those who answered 'completely related', 'mostly related' and half of those who responded 'half related, half unrelated')

While watching TV, multiscreeners are more likely to extend their TV viewing to their smartphones; less so on other devices

- Top multiscreening activities are mostly unrelated: browsing, social networking, email, gaming and shopping



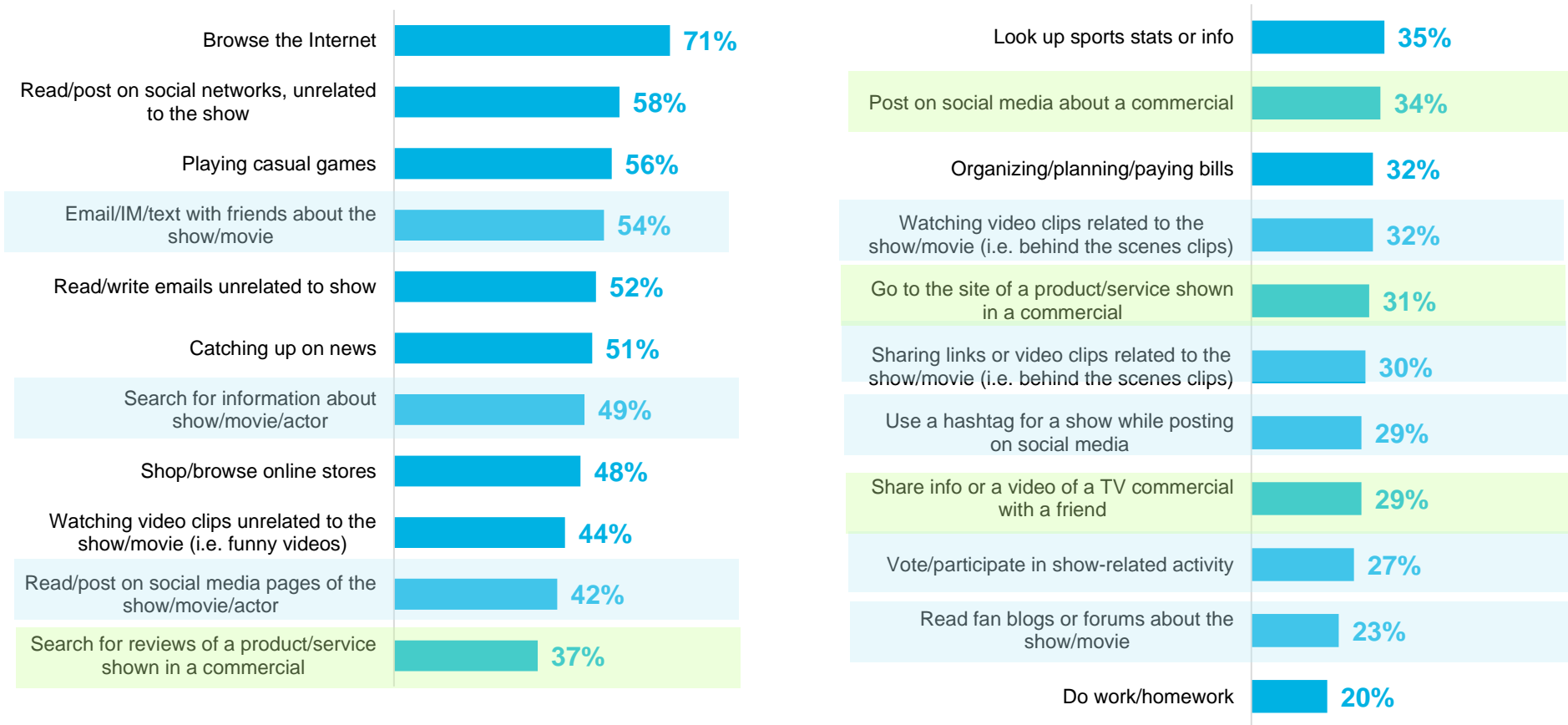
Q: When you are watching TV and using the device(s) listed below, what kinds of activities do you do on your device?
 Base: Adults 18+ who use a device while watching TV
 (Smartphone (N=303); Computer (N=317); Tablet (N=221))

While top multiscreening activities of smartphone users are unrelated leisure, a sizable portion is related to what they're watching on TV

- Top smartphone activities: surfing the internet, social networking, gaming, email
- **TV show related:** Roughly half socialize or search related to the TV show; one-third watch or share video: about one-quarter tweet/vote
- **TV commercial related:** Roughly one-third socialize or search related to TV commercials



Activities Engaged on Smartphone while Watching TV



Q: When you are watching TV and using the device(s) listed below, what kinds of activities do you do on your device?

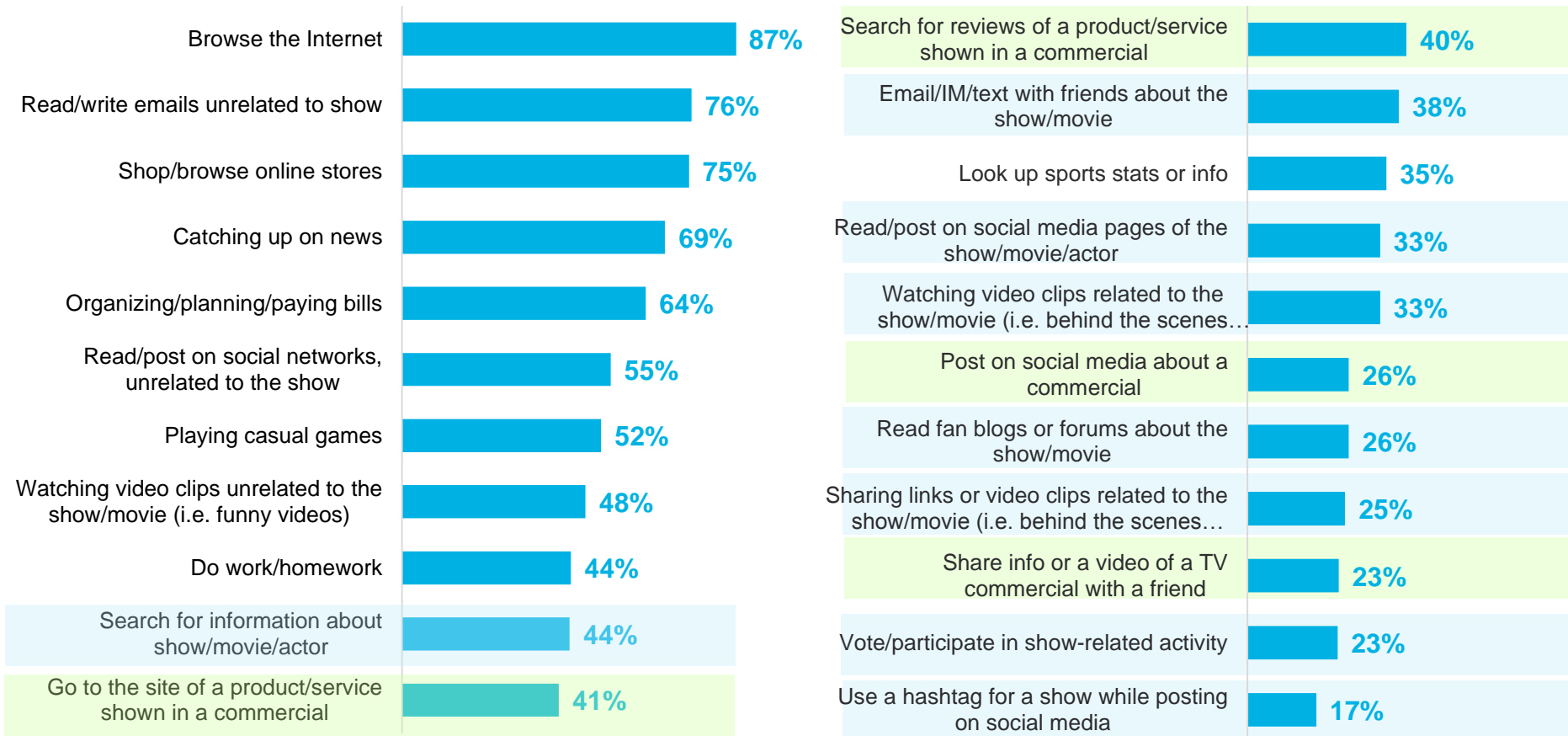
Base: Adults 18+ who use smartphone while watching TV (N=303)

Computer multiscreening is mostly utilitarian but some activity is related to TV

- **Top computer activities:** surfing the internet, email, shopping, news, bills
- **TV show related:** Less than half search, and about one-third socialize or visit sites related to the TV show
- **TV commercial related:** Roughly 4 in 10 visit sites or search products related to TV commercials; about 1 in 4 socialize around the ads



Activities Engaged on Computer while Watching TV



Q: When you are watching TV and using the device(s) listed below, what kinds of activities do you do on your device?

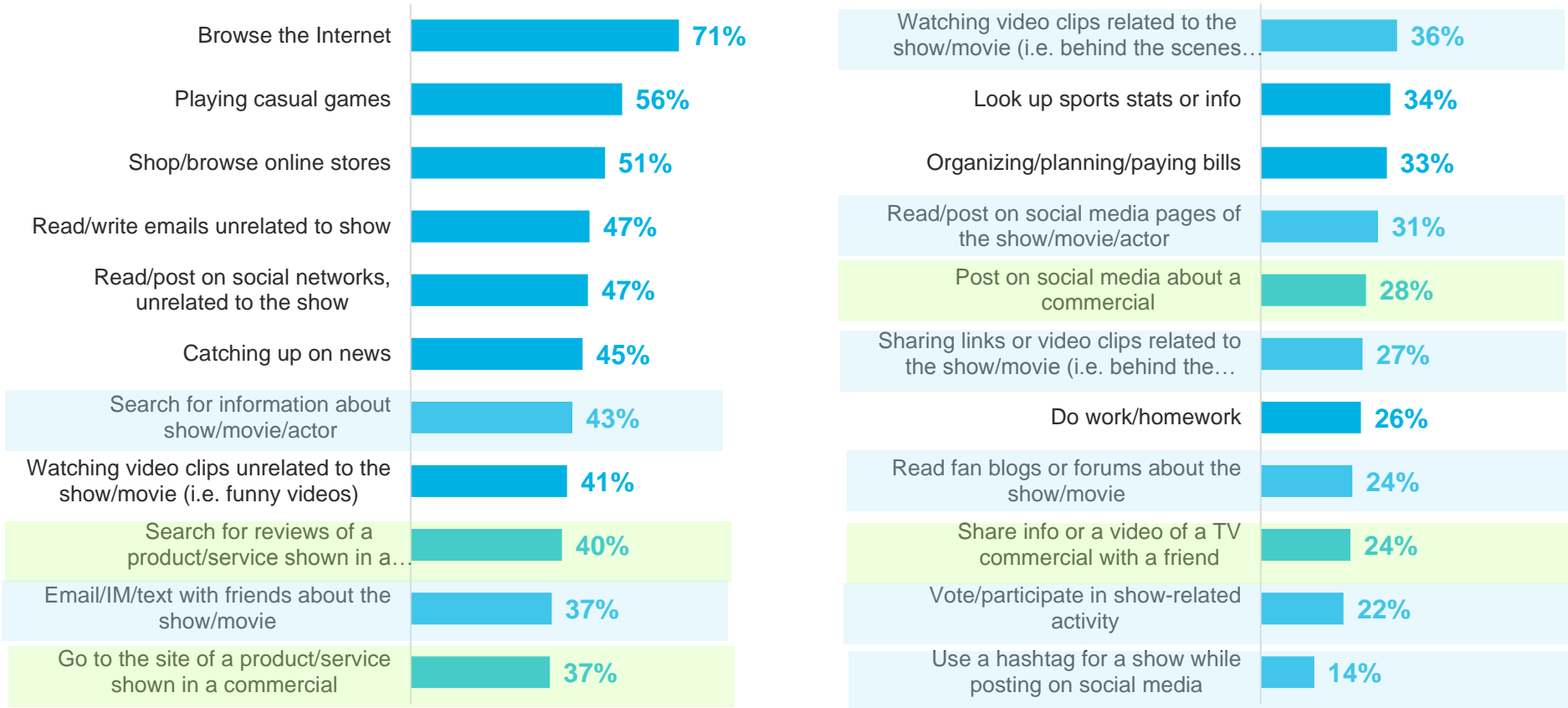
Base: Adults 18+ who use computer while watching TV (N=317)

Tablet multiscreening is a hybrid mix: Like smartphone use, top activities are unrelated leisure but there is some TV-related multiscreening and it mirrors that of computer users

- Top tablet activities: surfing the internet, gaming, shopping, email, social media
- TV show related: Roughly 4 in 10 search, and about one-third socialize or visit sites related to the TV show
- TV commercial related: Roughly 4 in 10 visit sites or search products related to TV commercials; about 1 in 4 socialize around the ads



Activities Engaged on Tablet while Watching TV



Q: When you are watching TV and using the device(s) listed below, what kinds of activities do you do on your device?
 Base: Adults 18+ who use tablet while watching TV (N=221)

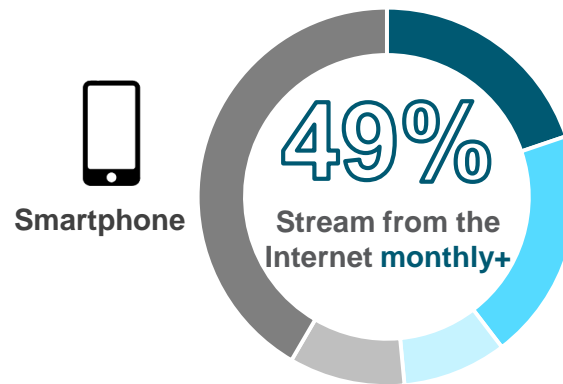
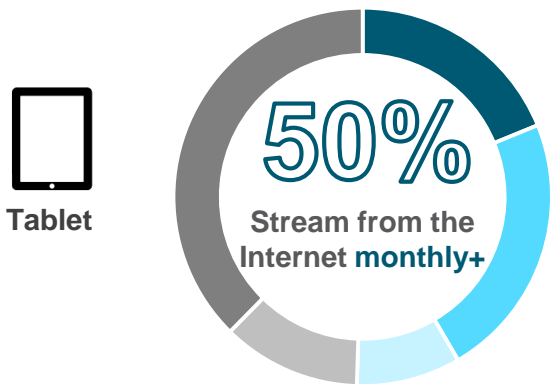
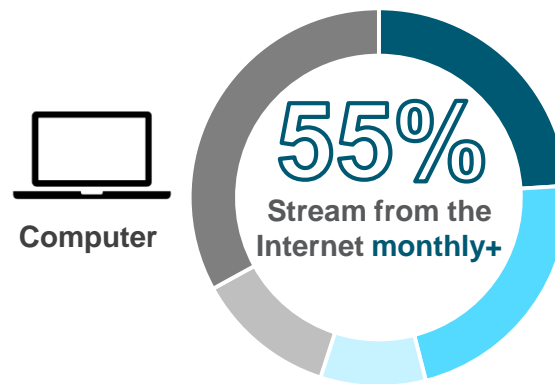
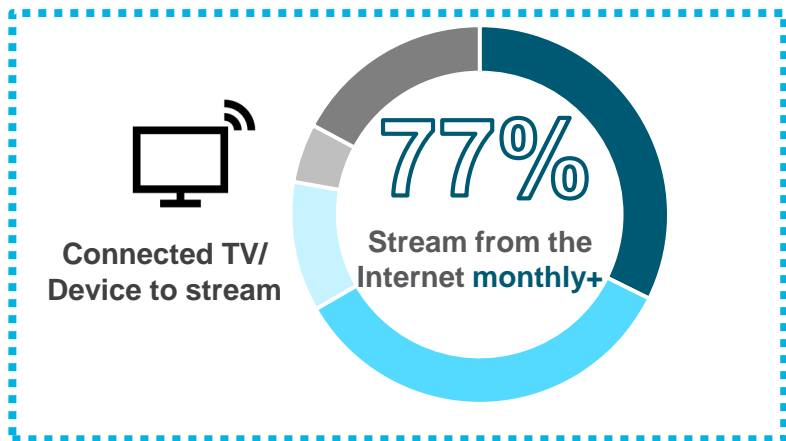
Streaming Habits: When the TV is off, what, how and where do consumers watch video?



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More than half of all device owners stream online video at least once a month

- 3 in 4 Connected TV owners stream video at least once a month

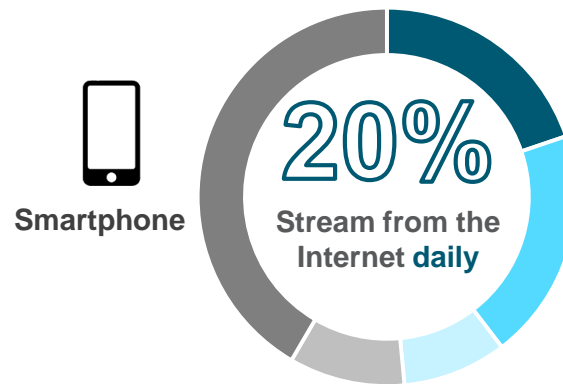
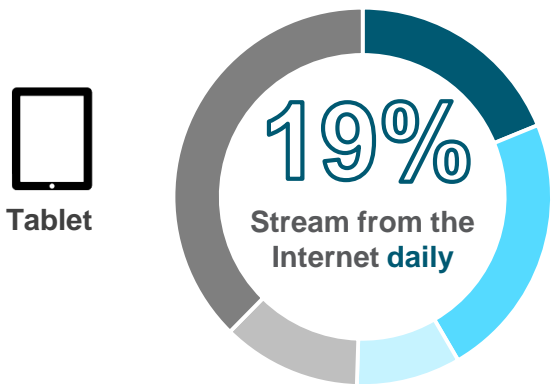
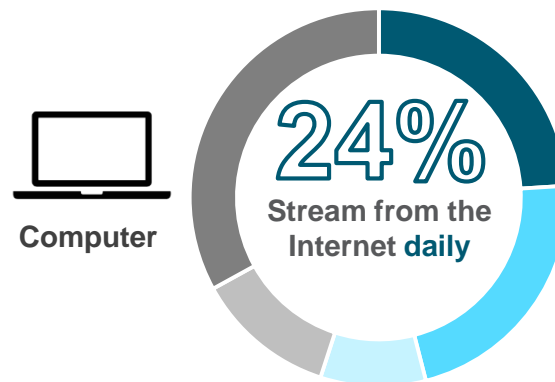
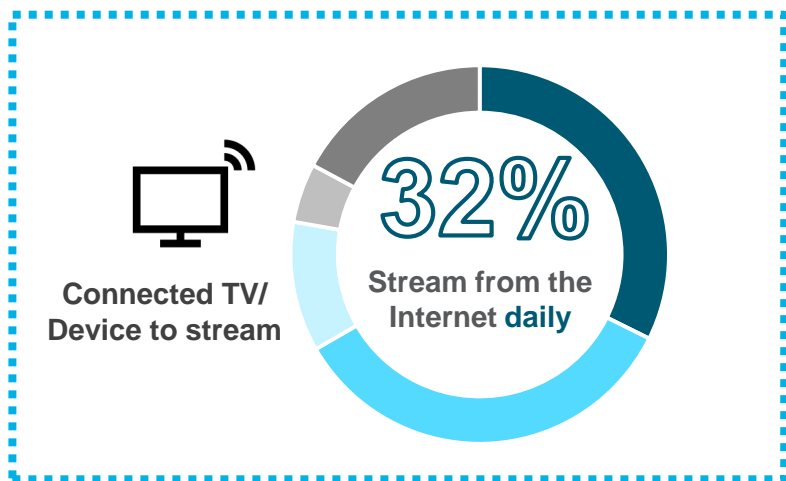


■ Daily ■ Weekly ■ Monthly ■ Once every few months ■ Never

How often, if ever, do you stream videos, shows or movies from the Internet to the following devices?
 Base: Adults 18+ who currently own device
 Connected TV/Device to stream (N=237); Computer (N=592); Tablet (N=416); Smartphone (N=441)

Connected TV users are heavier video streamers

- 1 in 3 Connected TV owners stream video to their Connected TV daily



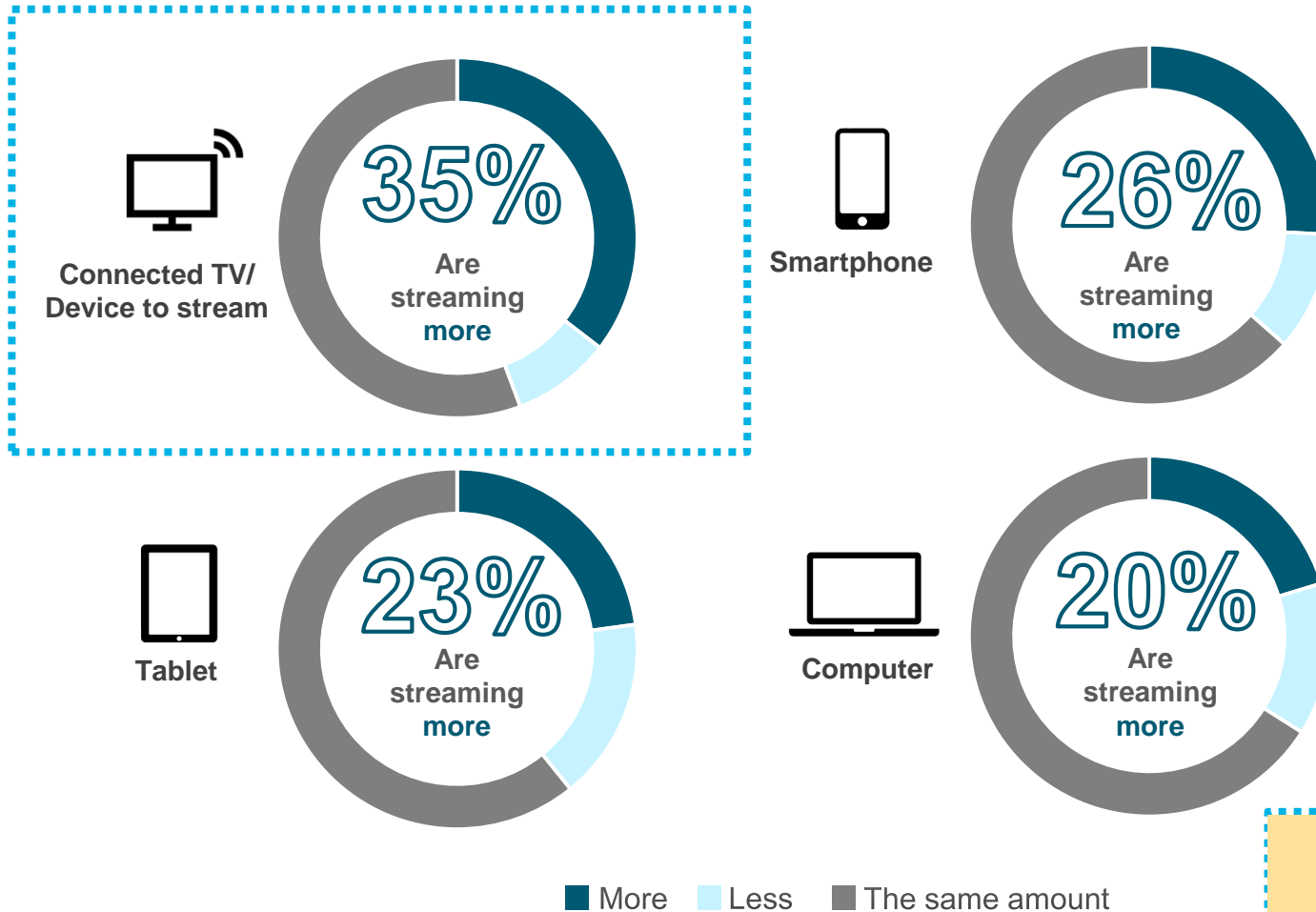
■ Daily ■ Weekly ■ Monthly ■ Once every few months ■ Never

How often, if ever, do you stream videos, shows or movies from the Internet to the following devices?

Base: Adults 18+ who currently own device

Connected TV/Device to stream (N=237); Computer (N=592); Tablet (N=416); Smartphone (N=441)

Streaming video has increased across devices, especially among connected TV owners



In contrast, **19%** are watching **less TV**

Q: Thinking back to this time last year, would you say you are now using each of these devices less, the same amount or more to stream videos, shows or movies from the Internet?

Base: Adults 18+ who currently own device

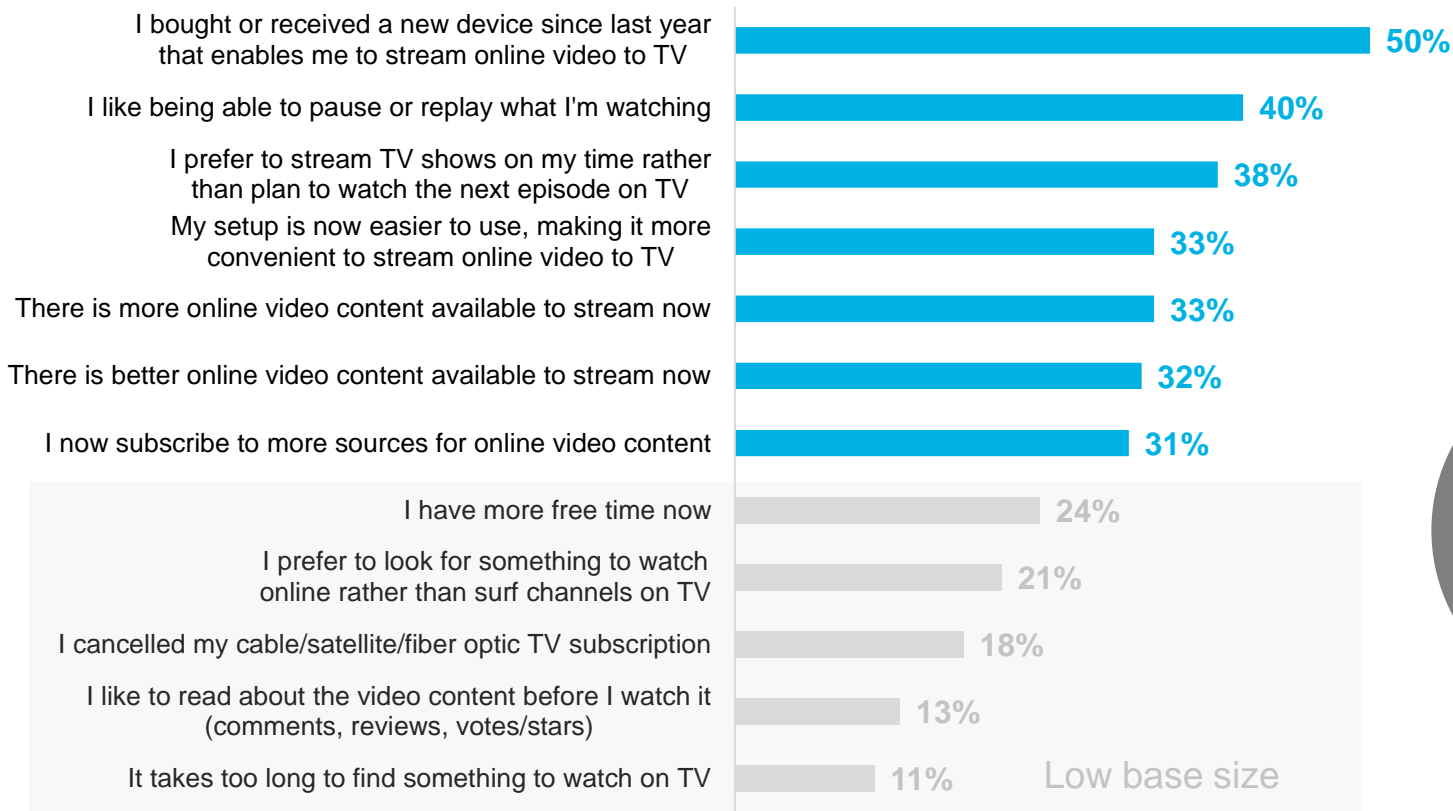
Connected TV/Device to stream (N=237); Smartphone (N=441); Tablet (N=416); Computer (N=592)

Increase in streaming video to TV is driven by the recent purchase of a connected TV/device and being able to control how and when to play content

- Half say they stream more to a connected TV because they got one in the past year
- Nearly 4 in 10 stream more because they prefer the controls and schedule
- One in three attribute their increased connected TV streaming to access to or improved video content

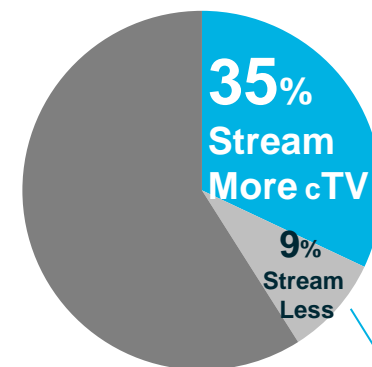


Why Streaming More To Connected TV/Device to Stream*



35%

Stream More to Connected TV



Top reason to stream less is "have less free time"

Q: You said that you are now streaming online video to your TV more than you did last year. Why is that?
 Base: Adults 18+ who are now streaming online video more to their Connected TV/Device to stream (N=84)

*Base size < N=100

For most streamers, it began with the purchase of a connected TV or device to stream used in tandem with a Netflix or Amazon Prime subscription to view content.

"I began to stream video first on my computer. Then my son gifted me with Apple TV one Christmas which started my interest in streaming to the TV."

– Female, 55-64 yrs. old

"Back in 2008 when I first started streaming from Netflix I believe I was only streaming thru a Roku box which I had specifically purchased for that purpose and later on as they came available I was using several different devices i.e. satellite provider box, Xbox 360, etc. I Currently have several subscription services i.e. Hulu Plus & Amazon Prime along with Netflix." – Male, 35-44 yrs. old

"I subscribed to Amazon Prime about 5 years ago and that's when I started streaming video on my smart TV, smartphone and iPad. I found it was really easy to watch shows and movies while I was on the go."

– Male, 25-34 yrs. old

"It really started with mobile devices for me. Having content on the go was a nice treat for me. But then I started getting addicted to binge watching and watching old TV shows that were "new" to me at the time. Then I started to watch more streaming at home using Amazon Prime and using Airplay to my TV. So it was probably a couple of years, when I started and now it's apart of my routine away and at home." – Male, 25-34 yrs. old

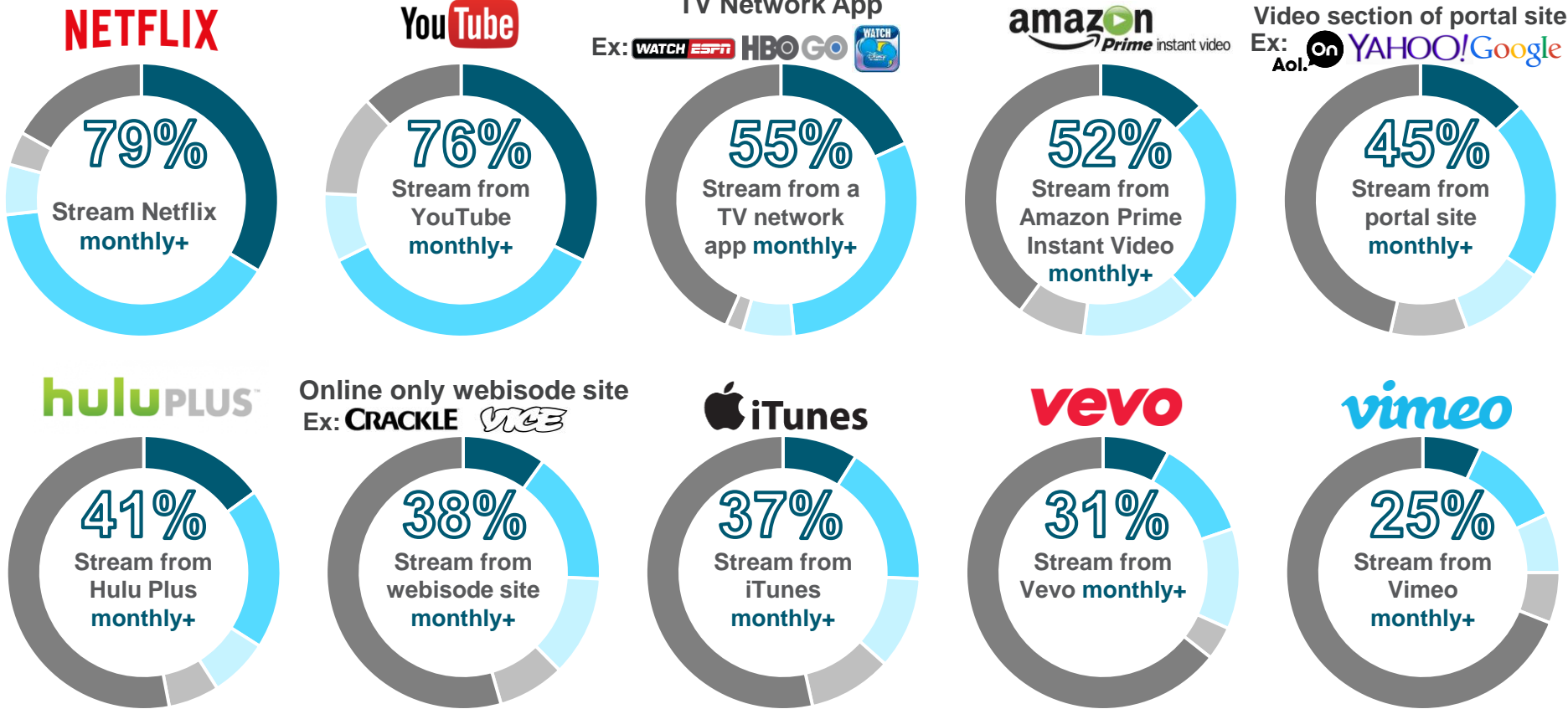
"My husband went and bought a smart TV two years ago and I fell in love with streaming Netflix. I love everything that is available, but wish more were."

– Female, 35-44 yrs. old



Discussion Forum: Please share with us how you began streaming video content to your TV. What was your original motivation for streaming video content? When did you start streaming video to your TV?
Base: Adults 25+ who currently own a streaming device (N=13)

Over three-quarters of connected TV users stream Netflix and YouTube video content at least once a month



Content Streamed to Connected TV

■ Daily ■ Weekly ■ Monthly ■ Once every few months ■ Never

How often, if ever, do you stream videos, shows or movies from the Internet to the following devices?

Base: Adults 18+ who stream online videos to their Connected TV/device to stream "once every few months or more" (N=196)

Long form video is streamed to connected TV, Computer and Tablet; Smartphone viewing is primarily of short form video

Types of Video Streamed by Device



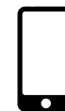
Connected TV/
Device to stream



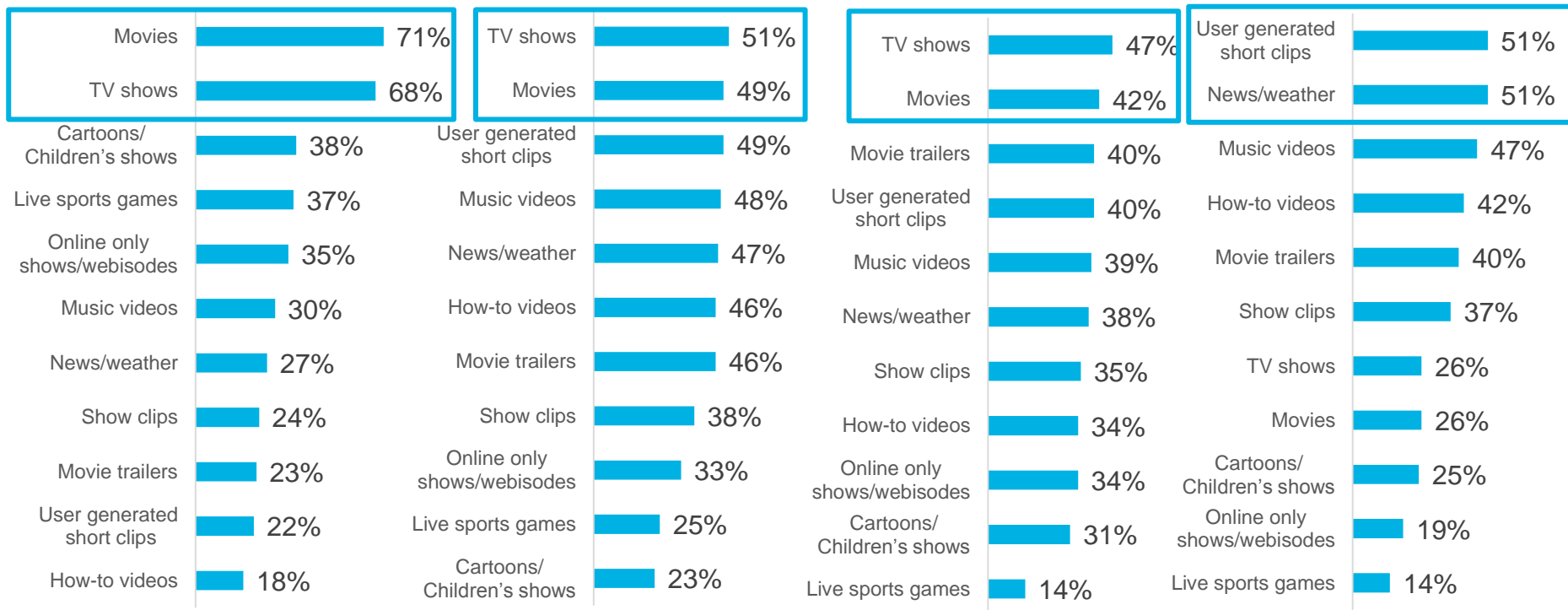
Computer



Tablet



Smartphone



Q: What kinds of videos do you stream to each of your devices?

Base: Adults 18+ who stream online videos to device "once every few months or more"

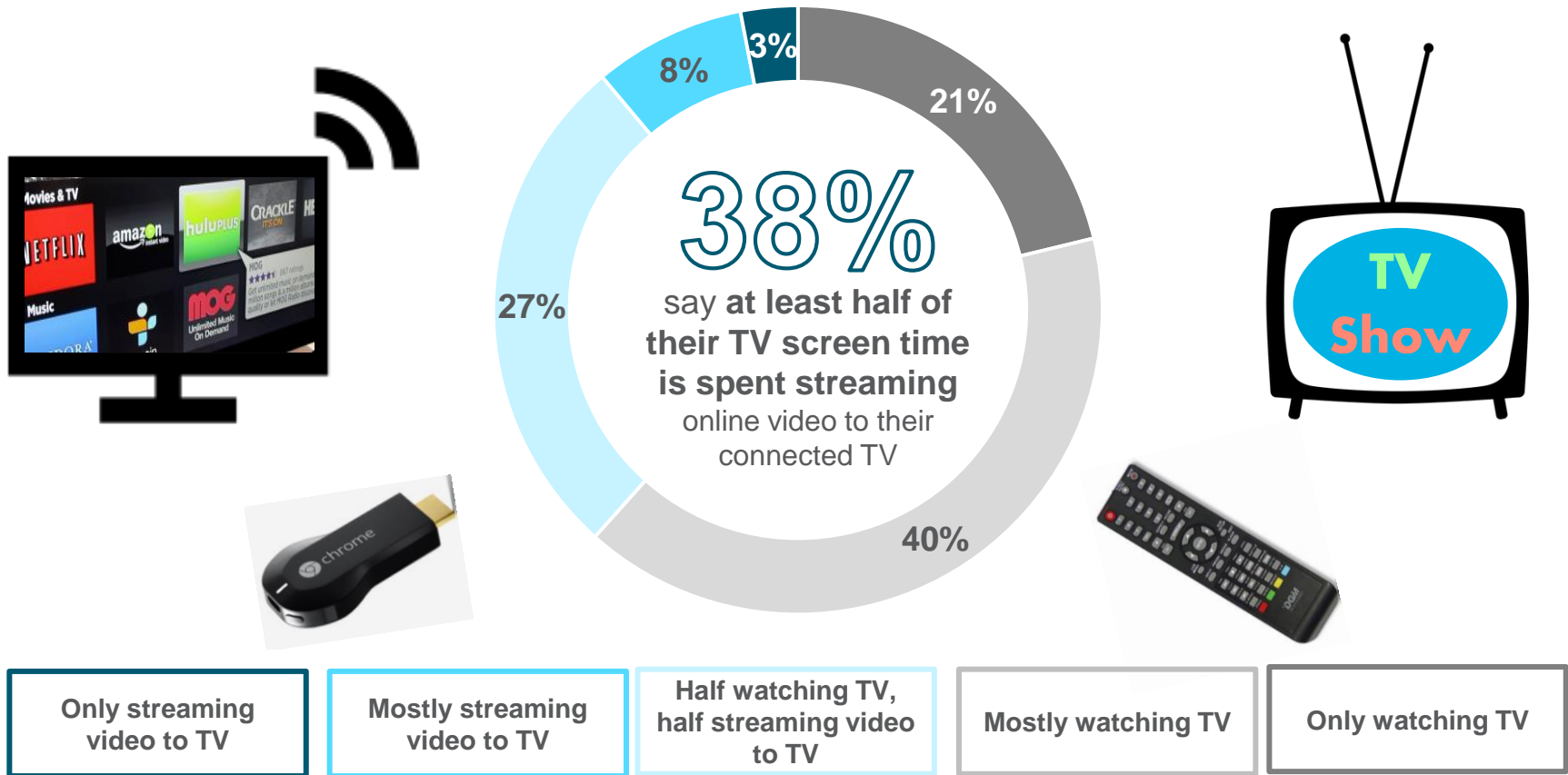
Connected TV/Device to stream (N=196); Computer (N=398); Tablet (N=259); Smartphone (N=257)

Connected TV vs. TV: How do consumers compare connected TV to regular TV?



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Connected TV owners allocate a considerable portion of their viewing time to streaming



Q: Overall, about how much of your viewing time would you say is spent watching TV (regular, cable, DirectTV, FIOS, satellite) vs. streaming online video to your TV?

My TV or video viewing time is spent ...

Base: Adults 18+ who own a Connected TV (N=153)

(Reflects sum of responses 'only streaming video to TV', 'mostly streaming video to TV' and 'half watching TV, half streaming video to TV') Connected

76% of connected TV viewers see no difference between TV and connected TV or think connected TV is better



Streaming is Better...*

They're the same...*

TV service is Better...*

I can watch what I want/have more control over what I watch	33%
Better selection/choices/more content that interests me	29%
I can watch anytime/anywhere/when I want to	27%
Less commercials	12%
Cheaper	10%
Doesn't have commercials	10%
I can pause/rewind by streaming	8%

Same/no difference/enjoy both equally (exclusive)	48%
Quality is the same	14%
Video/graphics are the same	6%
Content/shows are the same	5%

More dependable/no technical/buffering issues/difficulties	19%
Better quality/better quality programming	17%
Fast/faster	10%
Better selection/choices/more content that interests me	10%
Better quality picture/video	6%
Easy/easier	6%
Has newer content	6%

Q: Thinking about the TV shows/movies that you watch from your cable/satellite/fiber optic provider and those that you stream from the Internet to your TV, how would you compare the two?

Base: Adults 18+ who stream online videos to their Connected TV/device to stream "once every few months or more" (N=196)

Q: Why do say that streaming from the Internet is a better experience than regular TV or cable?

Base: Adults 18+ who stated that "Streaming from the Internet is a better experience than regular TV or cable" (N=49)

Q: Why do say that both viewing experiences are the same?

Base: Adults 18+ who stated that "Both viewing experiences are the same" (N=99)

Q: Why do say that TV service provider is a better experience than streaming?

Base: Adults 18+ who stated that "TV service provider is a better experience than streaming" (N=48)

*Base size < N=100

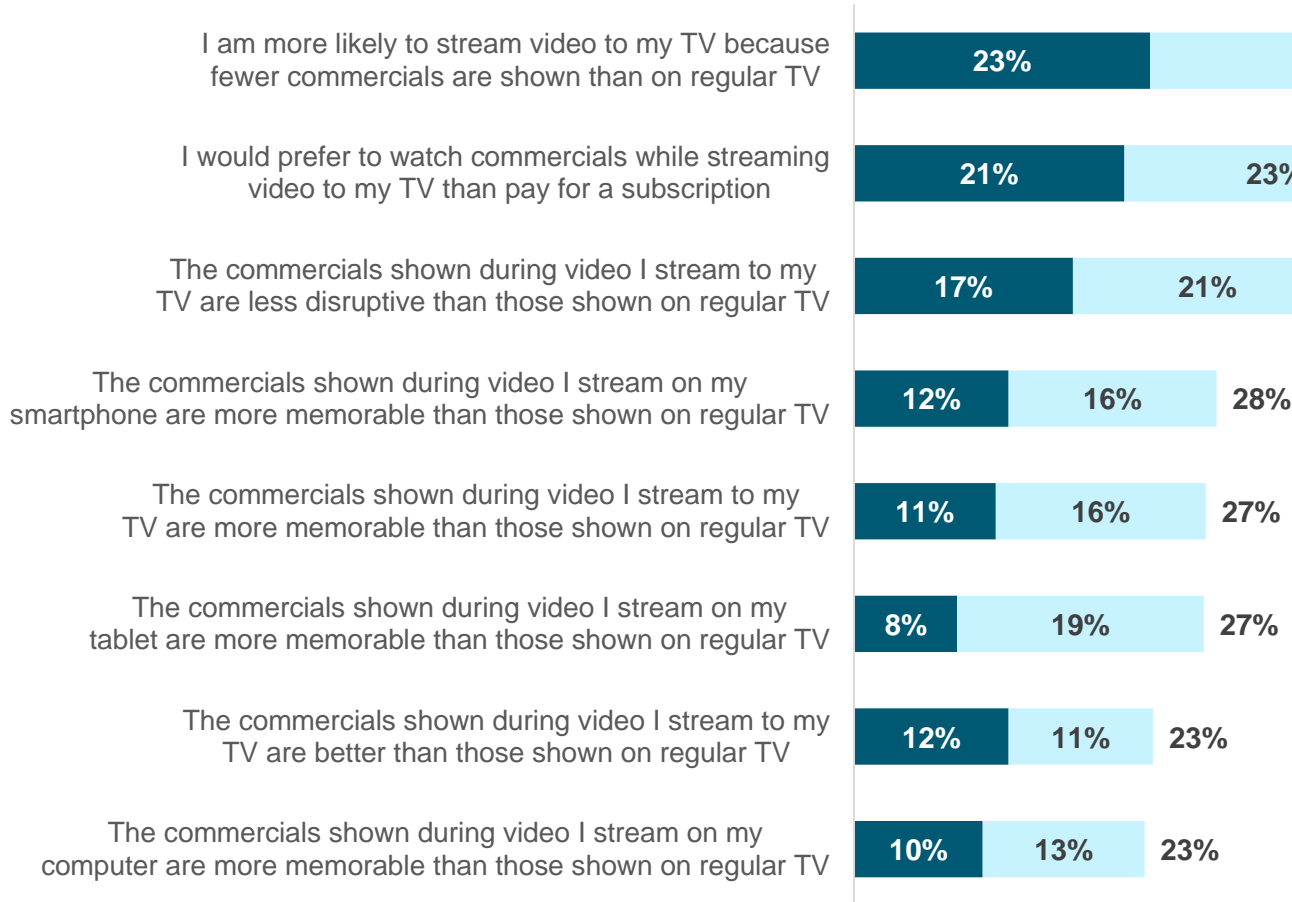
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Those with a connected TV/device to stream are more receptive to commercials because there are fewer of them when they stream video and they find them to be less disruptive.

Agreement Statements

■ 5 – Strongly agree ■ 4 on a 5pt scale

Top 2 Box



"I think they are more memorable when you watch streaming content because they have less commercials in general compared to non-streaming content. I think they are less intrusive because there are less of them and you don't feel bombarded with information on a multitude of products."

– Male, 25-34 yrs. old



Q: How much do you agree or disagree with the following statements? (Top 2 Box Summary)

Base: Adults 18+ who stream online videos to their Connected TV/device to stream "once every few months or more" (N=196)

Other benefits to streaming online video as compared to TV:

- Offers users control (ability to pause, forward, rewind)
- Offers the convenience to watch based on viewer's schedule
- Offers the ability to view on-the-go

"With cable you do not have the ability to back, forward, skip around and watch exactly what you want at that time."

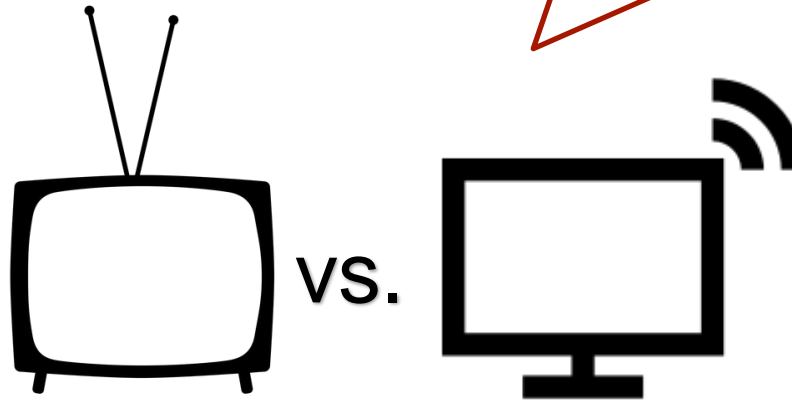
– Female, 25-34 yrs. old

"Normal TV at home is limited because you can't take it with you. Streaming offers the convenience of take anywhere and watch when you want."

– Male, 25-34 yrs. old

"I get to choose what I want to watch instead of having to choose from satellite where there are a lot of channels, but very few shows that I am interested in. There are infinite number of videos to choose from online."

– Female, 25-34 yrs. old



"When watching regular TV you can only watch what's being broadcast at that time and sometimes you have to make sacrifices when two interesting shows are on. When streaming you don't have to make sacrifices."

– Male, 25-34 yrs. old

Discussion Forum: Do you feel there are any differences in the experience of watching regular TV versus watching streaming video or do you feel they are the same?

Base: Adults 18+ who currently own a streaming device (N=13)

Takeaways

Streaming video is changing the TV experience:

- **Most Americans view TV accompanied by a device**
- Multiscreening is a daily activity and many say they're multiscreening more as compared to a year ago.
- The smartphone is most popularly used as the second screen device: Two-thirds of smartphone owners watch TV with their phone, most do so daily, and they are more likely to multiscreen related to the TV show or commercials than are other device multiscreeners.
- Multiscreeners say they pay slightly more attention to the TV except computer multiscreeners who evenly split their attention.
- About one-quarter of multiscreeners say they do something related to what they're watching on TV on their devices.
- While most multiscreening is unrelated (browsing is the #1 activity), some multiscreening is related to the TV shows and commercials, particularly among smartphone multiscreeners.
- **Streaming video across devices, particularly to a connected TV, is growing**
- At least half of all owners of video-capable devices stream video on them at least once a month.
- Three out of four Connected TV owners stream video monthly and one in three streams video to their connected TV daily.
- In contrast, only 11% of TV viewers are watching more TV and 19% are actually watching less TV.

Takeaways

Streaming video is changing the TV experience:

- Connected TV currently represents only about 1 in 3 consumers but these viewers are streaming more than they did last year and are getting into the habit of watching video daily.
- Many indicate that they see no difference in quality between viewing video over a connected TV or watching 'regular' TV. Some even prefer streaming to their connected TV because they can control the viewing experience and schedule.
- Connected TV viewers watch about 2 hours a day – TV time that is not reachable via regular TV advertising.
- **Implications:**
 - As the many ways to view video evolve and grow more popular, marketers are faced with new challenges but also offered new opportunities to reach consumers.
 - Today's multiscreening TV viewers are reachable over multiple screens, offering 'extended' advertising canvases in which to capture consumers' attention. These 'bonus' digital formats are additive to the marketers' traditional media platforms.
 - Connected TV viewers, on the other hand, take away from traditional TV buying channels in that their TV screen is occupied by digital content. These consumers are only reachable at these prime hours via digital video advertising or advanced TV ads.
 - As video viewing evolves and ways to reach consumers expand beyond the traditional means, marketers and advertisers will be faced with ever-increasing choices in their ad buys. One thing is for certain, the lines between TV and digital are increasingly blurring and the consumer views it all as just 'video'. Marketers and advertisers should evolve their media mix along with consumers' media behaviors in order to stay relevant and keep their brands top of mind.

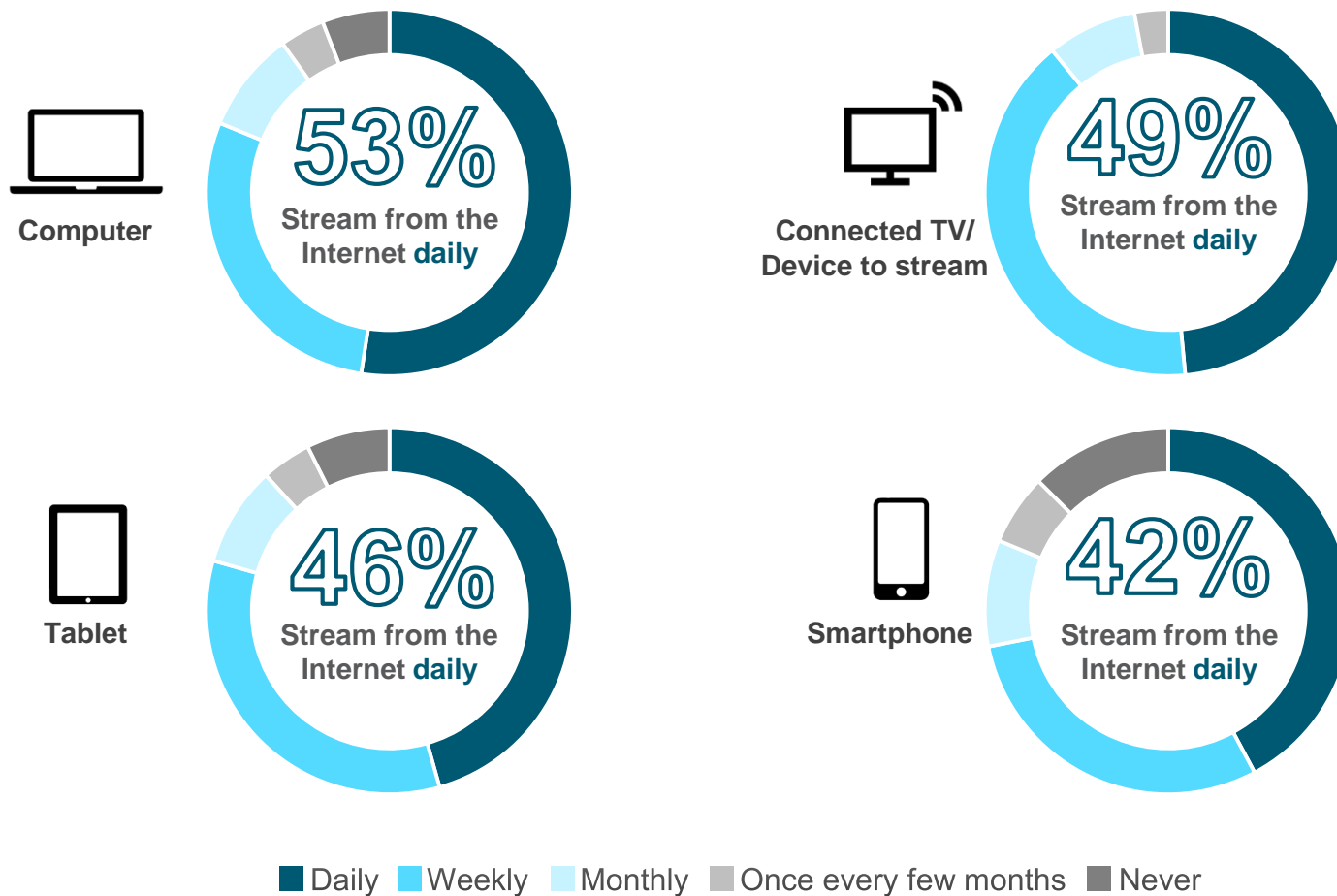
Appendix



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Monthly+ streamers of original digital video webisodes are heavy daily streamers of content

Among those who stream webisodes “Monthly+”*



How often, if ever, do you stream videos, shows or movies from the Internet to the following devices?

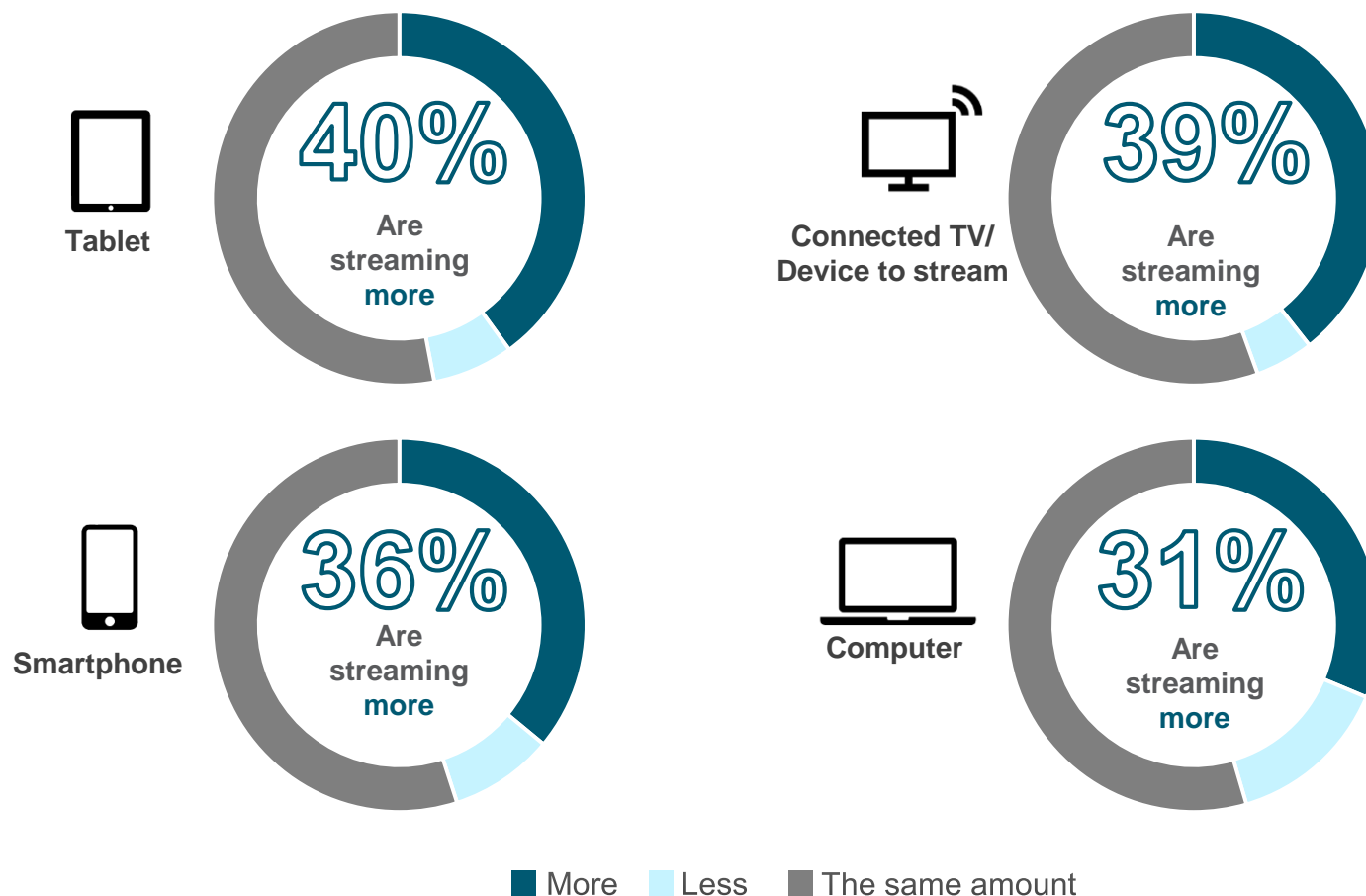
Base: Adults 18+ who currently own device AND stream videos from an online only webisode site to their device 'Monthly or more'

Computer (N=70); Connected TV/Device to stream (N=74); Tablet (N=68); Smartphone (N=64)

*Base size < N=75

At least 3 out of 10 monthly+ streamers of webisodes state they are streaming more to their devices when compared to a year ago

Among those who stream webisodes “Monthly+”*



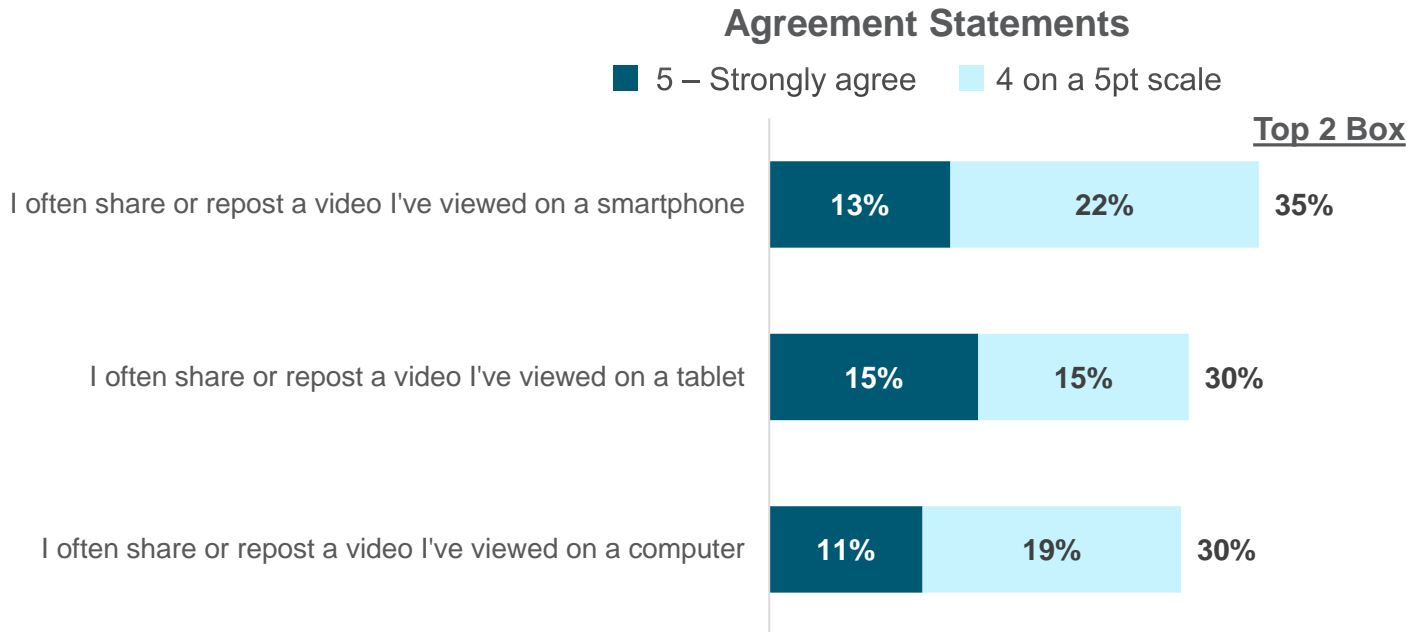
Q: Thinking back to this time last year, would you say you are now using each of these devices less, the same amount or more to stream videos, shows or movies from the Internet?

Base: Adults 18+ who currently own device AND stream videos from an online only webisode site to their device 'Monthly or more'

Tablet (N=68); Connected TV/Device to stream (N=74); Smartphone (N=64); Computer (N=70);

*Base size < N=75

Three out of ten connected TV streamers indicate they frequently share or repost video they have viewed on one of their devices



Q: How much do you agree or disagree with the following statements? (Top 2 Box Summary)

Base: Adults 18+ who stream online videos to their Connected TV/device to stream "once every few months or more" (N=196)

Screen size is a strong consideration when deciding the type of content to stream.

Agreement Statements

■ 5 – Strongly agree ■ 4 on a 5pt scale

Top 2 Box

I prefer watching longer videos like a movie or TV show on a connected TV than on a tablet

37%

31%

68%

I am more likely to watch short videos (less than 15 minutes) on a smartphone/tablet than on a connected TV

27%

26%

53%

I usually stream videos on a smartphone to entertain my child

16%

16%

32%

Q: How much do you agree or disagree with the following statements? (Top 2 Box Summary)

Base: Adults 18+ who stream online videos to their Connected TV/device to stream "once every few months or more" (N=196)

When deciding what content to stream, most find specific programming they have an interest in or browse specific genres they enjoy.

“Now that I only stream shows my decision making process is a mixture of knowing what I want to watch beforehand and watching things that strike my mood. If I find a new show that's peaked my interest then I stream with the intention of watching that show. However, most of the movies I watch are based on my mood.”
– Male, 25-34 yrs. old

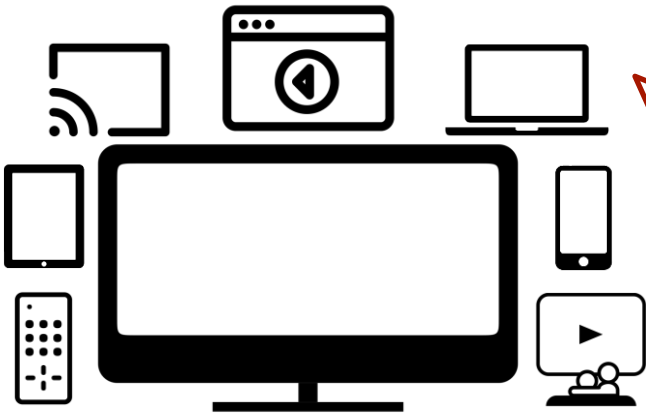
“Most of the time I know what I want to watch when I start watching something. Normally I might see an ad for a new show, and if it appeals to me, I will watch.”
– Female, 55-64 yrs. old

“If there is a particular show airing that day, I will watch that. If not, I like to browse around until I find something that interests me. I prefer to watch streaming shows when I am binge watching or can't find anything on regular TV (cable) to watch.” – Male, 25-34 yrs. old

“Content and storyline are important. Time is limited and I want to feel like watching a show or movie was worth the time spent. I'm not just looking for content that's entertaining. It should be engrossing.” – Male, 25-34

“Storyline is huge to us. We like to be able to follow a story from the beginning to the end. We hate stalls or time delays. We get involved in murder mysteries, anything that we can guess on who done it and how is great.”
– Female, 35-44 yrs. old

“I know when new episodes of my favorite shows are out on Netflix and I set up enough time to stream just those shows during the week. I know what I want to watch beforehand. It does differ for regular TV you can't really watch what you want and when you do you can't go back, or forward. Streaming it lets me watch what I want when I want.” – Female, 25-34yrs. old



Discussion Forum: Walk us through your decision-making process when you are deciding what to watch on TV (regular TV or streaming online video content to your TV).
Base: Adults 25+ who currently own a streaming device (N=13)

Thank You

Questions?

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