

Which Screen? Every Screen



CAB Proprietary Online Landscape Study



Two Step Research Plan

Media Clinics

Six clinics in three cities provided a base line understanding of the current multi-screen landscape



Landscape Survey

2,200-person on-line survey; ages 13+; Respondents must watch video on 2+ devices



Frank N. Magid Associates, Inc.

Advertiser's Questions



How is Multi-Screen Usage Different by Demographic Group?

What Motivates Screen Selection?

What is the Impact of Increased Availability of Online Video?

What is the Advertising Acceptance on Each Platform?



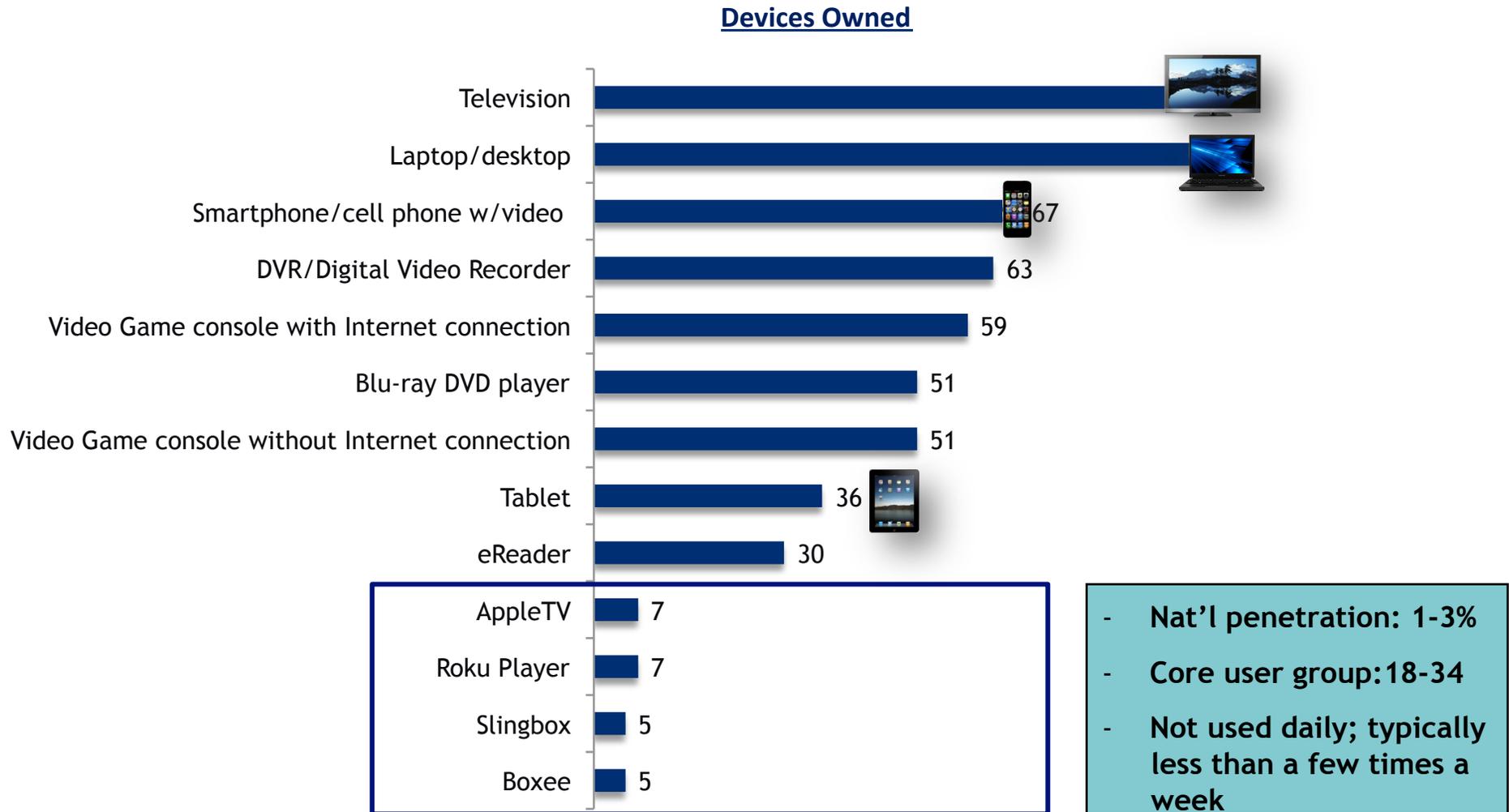
BOXEE



We Asked About 13 Different Platforms...



...And Found Over the Top Devices are Still Evolving



100 How many of the following devices do you or does anyone else in your household own?

Ultimately, Out of the 13 Platforms We Examined Video Viewing Still Comes Down to Four Primary Screens

Television



Computer



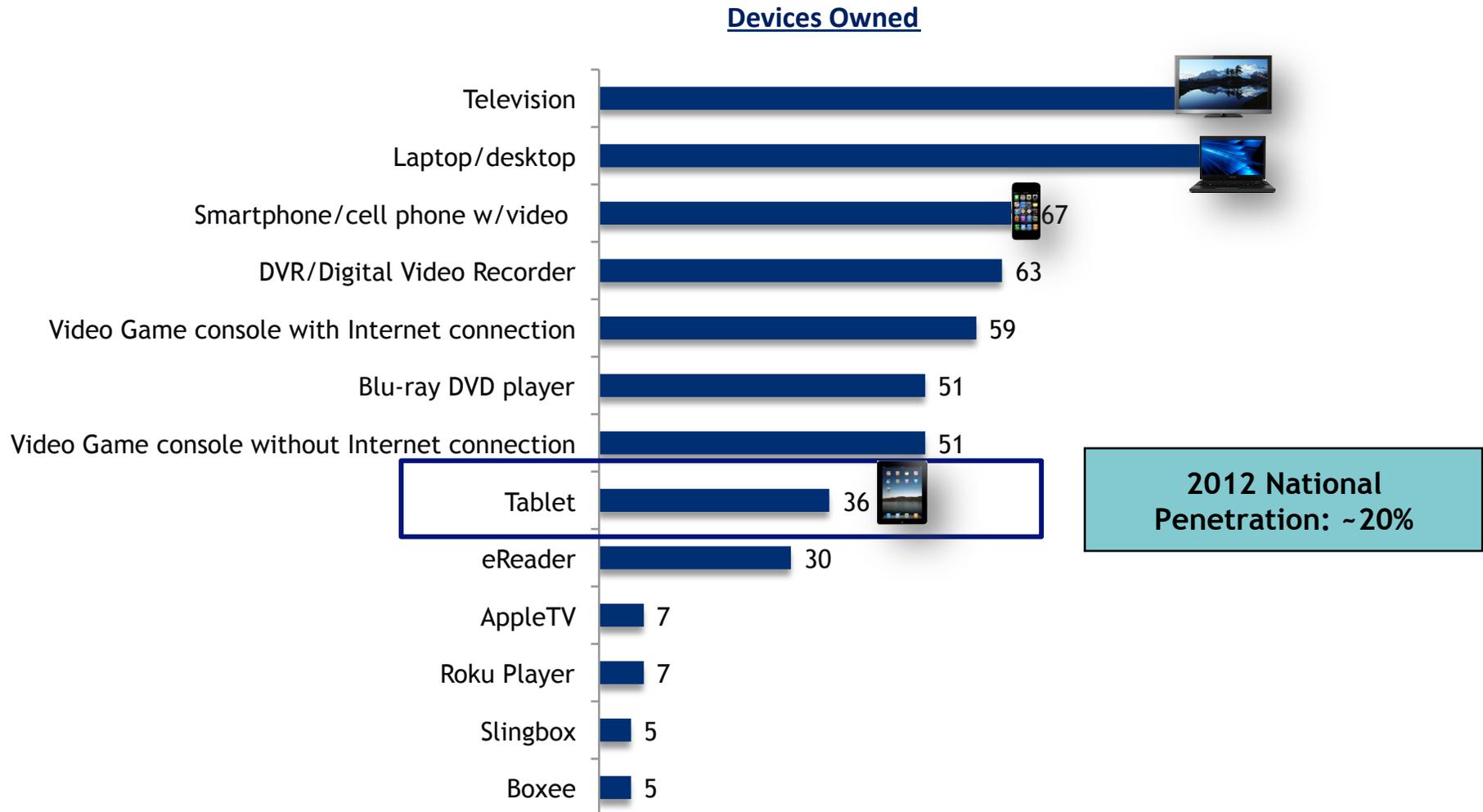
Tablet



Smartphone



High Tablet Penetration Reflects 2016+ Levels, May Provide a Glimpse into the Future



100 How many of the following devices do you or does anyone else in your household own?
Tablet penetration source: Nielsen, August 2012; broadband homes

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Computer Has Evolved to a Daily Video Device; Tablet is Still Finding its Place

Use Device to Watch Video: Adults 18-49

■ Once a week or more

■ Once/a few times/month

■ Never



59% of tablet owners never use it for video

110 How often do you watch video on each of the devices listed below? By video we mean any type of video content (e.g., dramas, sitcoms, movies, sports, and user-generated videos such as YouTube) that you access on your TV (e.g., live, on a DVR, On Demand, streaming), on a computer or on a mobile device.

Television Remains Strong Against Young Adults

Use Device to Watch Video: Once a Week or More



Adults 18-49

87



Teens

84



18-24

82



25-34

86



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18-24 are the Heaviest Computing Years

Use Device to Watch Video: Once a Week or More



Adults 18-49



Teens



18-24



25-34



87

84

82

86



78

77

86

80



Evidence of a life stage shift?

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Low Video Usage on Smartphones Among Teens is “Surprising”

Use Device to Watch Video: Once a Week or More

	 Adults 18-49	 Teens	 18-24	 25-34
	87	84	82	86
	78	77	86	80
	45	37	52	52

110 How often do you watch video on each of the devices listed below? By video we mean any type of video content (e.g., dramas, sitcoms, movies, sports, and user-generated videos such as YouTube) that you access on your TV (e.g., live, on a DVR, On Demand, streaming), on a computer or on a mobile device.

Tablet Video Viewing is Low Across the Board

Use Device to Watch Video: Once a Week or More

	 <u>Adults 18-49</u>	 <u>Teens</u>	 <u>18-24</u>	 <u>25-34</u>
	87	84	82	86
	78	77	86	80
	45	37	52	52
	28	23	33	31

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New Video Devices Have Not Cannibalized TV Viewing



Device Usage Compared to a Year Ago: Increased or Stayed the Same



Adults 18-49

83



Teens

72



18-24

70



25-34

85

More evidence
of a life stage
shift

BASE: Users of each device to watch video
300 Compared to 1 year ago, would you say the total amount of video you watch each of these devices has...?

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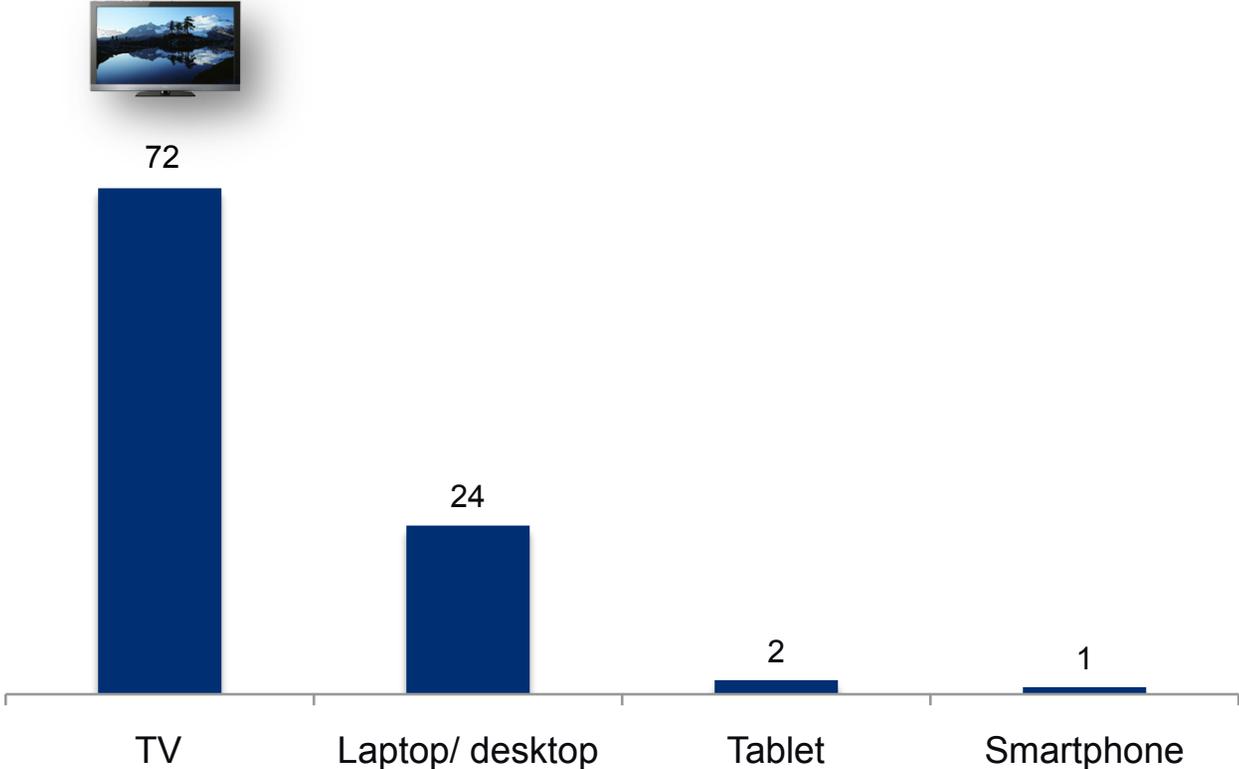


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Television Remains the Video King Among Adults 18-49

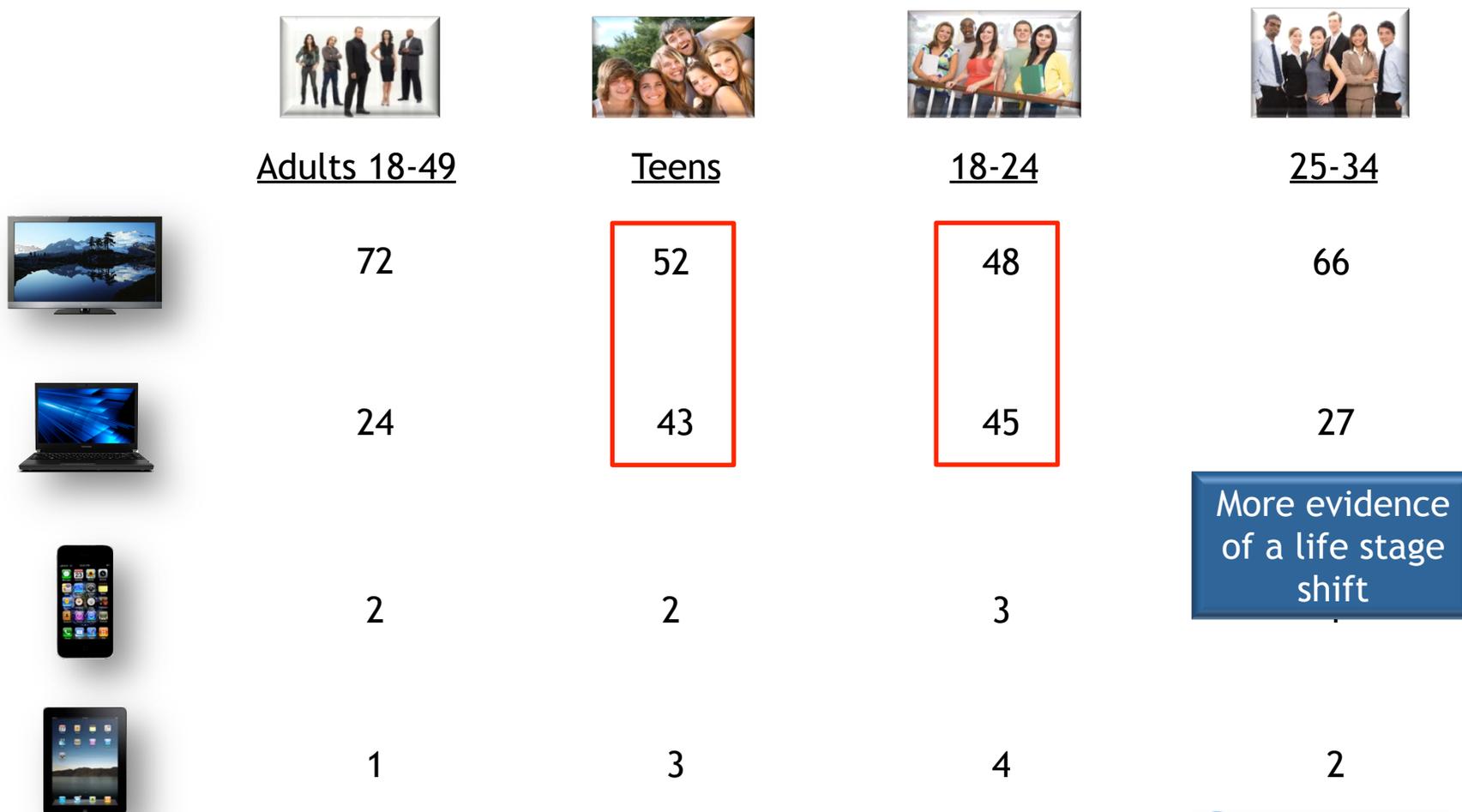
Best Device For Watching Video: A18-49



BASE: Users of each device to watch video
205 Overall, which of the following is the best device for watching video?

However, There Seems to Be More Parity Among the Younger Demos

Best Device for Watching Video



BASE: Users of each device to watch video
205 Overall, which of the following is the best device for watching video?

Tablet is the ‘Jack of All Trades’, Master of None

Emotional Attitudes Towards Screens

Among owners, percent who say the statement best describes the device

Top device



“Relaxation”



“Escape & Personalization”



“Jack of all Trades”



“Quick fix”

	TV	Laptop/desktop	Tablet	Smartphone
Lean back and enjoy	70%	22%	17%	9%
For my entertainment	52%	40%	19%	11%
Provides an escape	43%	43%	22%	15%
Lets me watch what I want to when I want to	34%	53%	19%	12%
Is something I can use/watch when I only have a few minutes	25%	38%	26%	46%

BASE: Users of each device to watch video

805 Please choose the device that is best described by each of the following statements.

Tablet is Used at Home and on Longer Trips

Usage Occasions

Percent who watch on each device



“Home”



“Every where”



“On-the-Go”

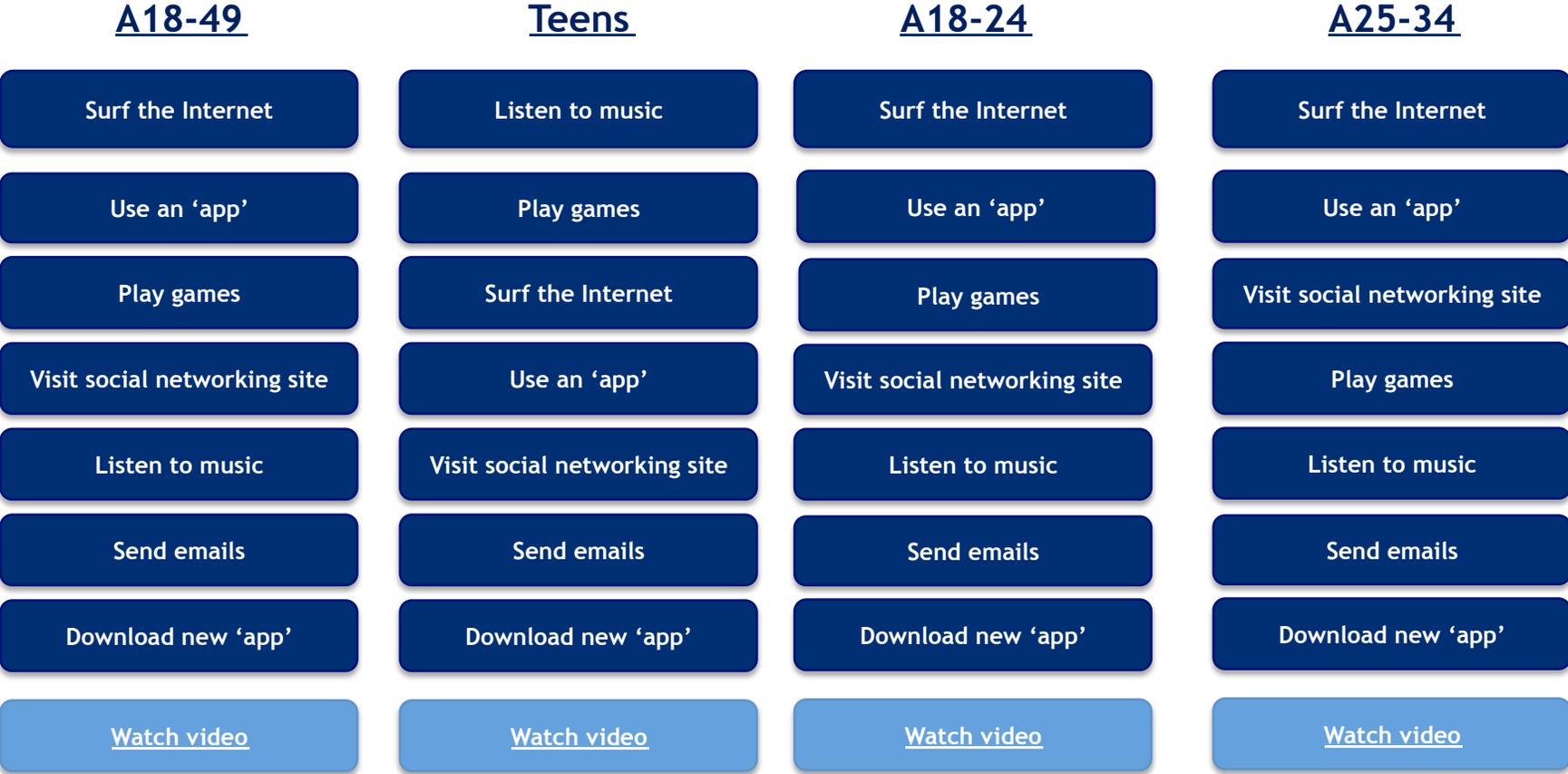
	TV	Laptop/desktop	Tablet	Smartphone
At home	83%	68%	44%	36%
At a friend's house	50%	24%	24%	37%
While waiting for something	22%	17%	43%	68%
In a dorm room	12%	17%	18%	16%
When traveling	9%	32%	51%	55%
At work	7%	26%	15%	33%
While commuting	5%	11%	26%	40%

BASE: Users of each device to watch video
 500 For this question, please think about video viewing occasions. For each occasion, please select the device(s) on which you watch video content. Select all that apply.

Tablet is an Entertainment Driven, ‘Jack of All Trades’ Device



Top Activities on the Tablet:
A few times a week or more



BASE: Users of each device to watch video
 400/405/410/415 How often do you do the following on your tablet?

Advertiser's Questions

Are Video Screens Interchangeable?

What Motivates a Consumer to Use a Particular Screen?

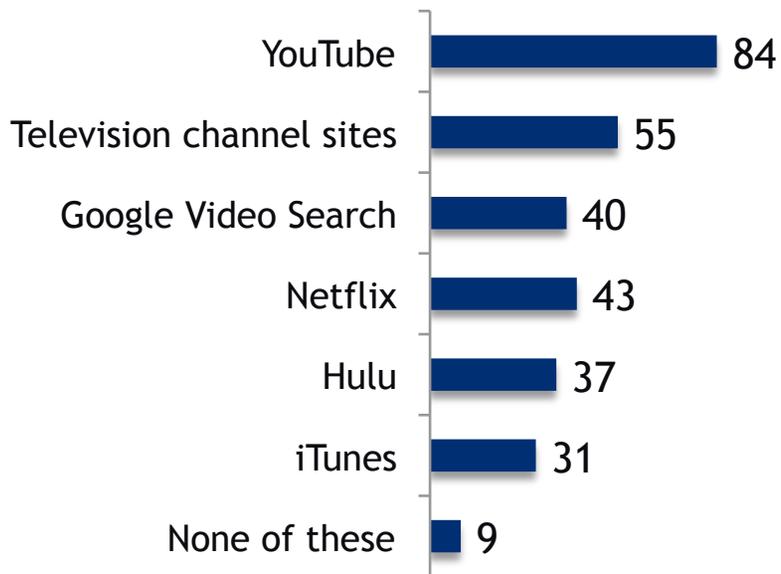
What is the Impact of Increased Availability of Online Video?

What is the Advertising Acceptance on Each Platform?



Of All Video Viewing, YouTube is # 1 Among Adults 18-49

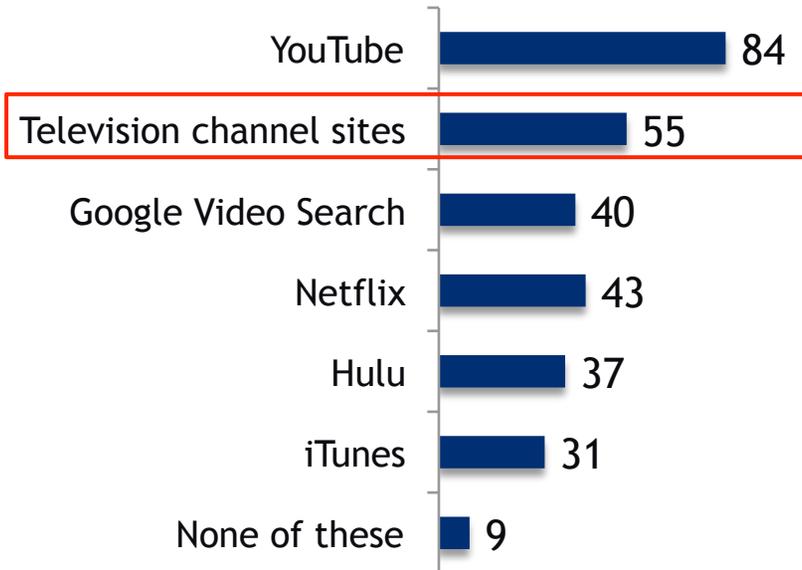
Online Video Sites Used (A18-49)



830 Which of the following do you use to access online video? Select all that apply.
1215 Which of the following, if any, do you subscribe to? Select all that apply.

Only YouTube Beats Television Sites

Online Video Sites Used (A18-49)

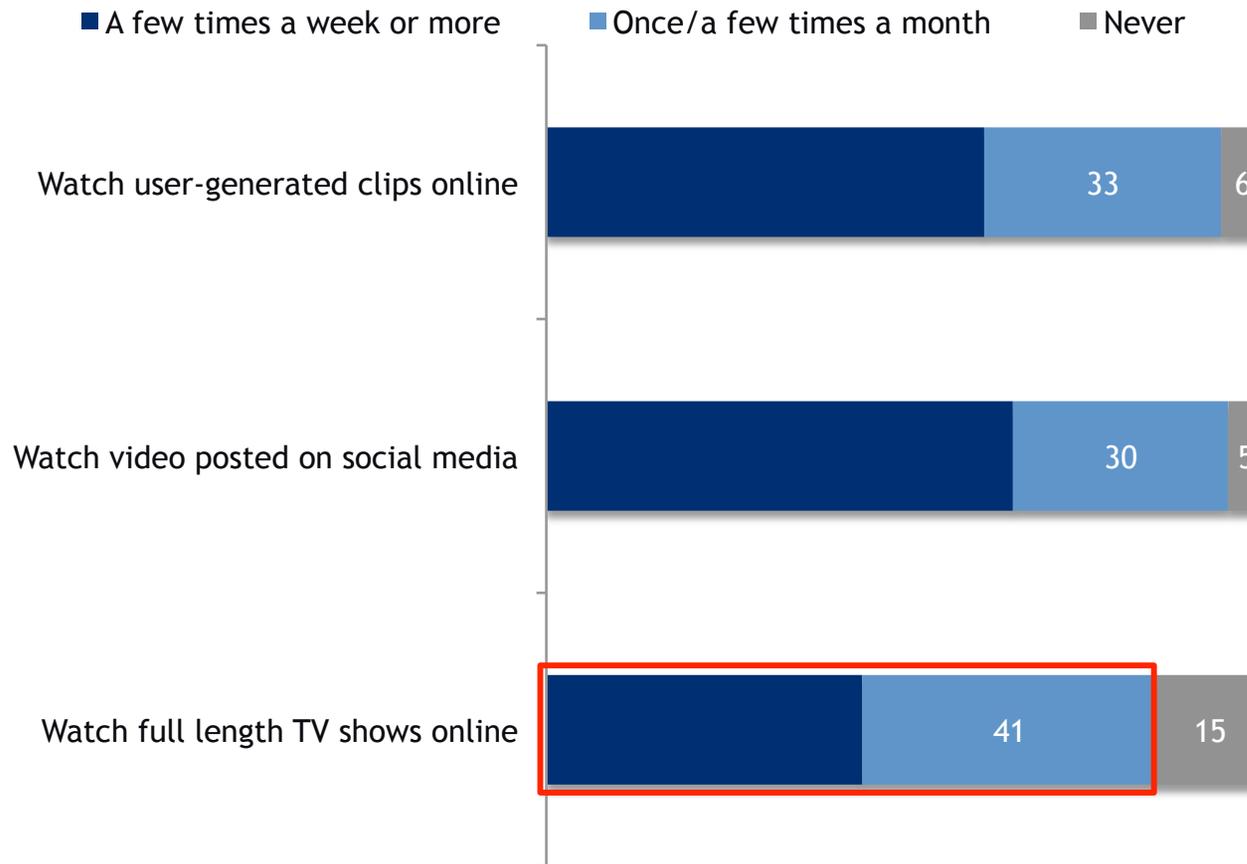


Why Television Sites

830 Which of the following do you use to access online video? Select all that apply.
1215 Which of the following, if any, do you subscribe to? Select all that apply.

TV Shows are Gaining Momentum

Online Video Usage - A18-49

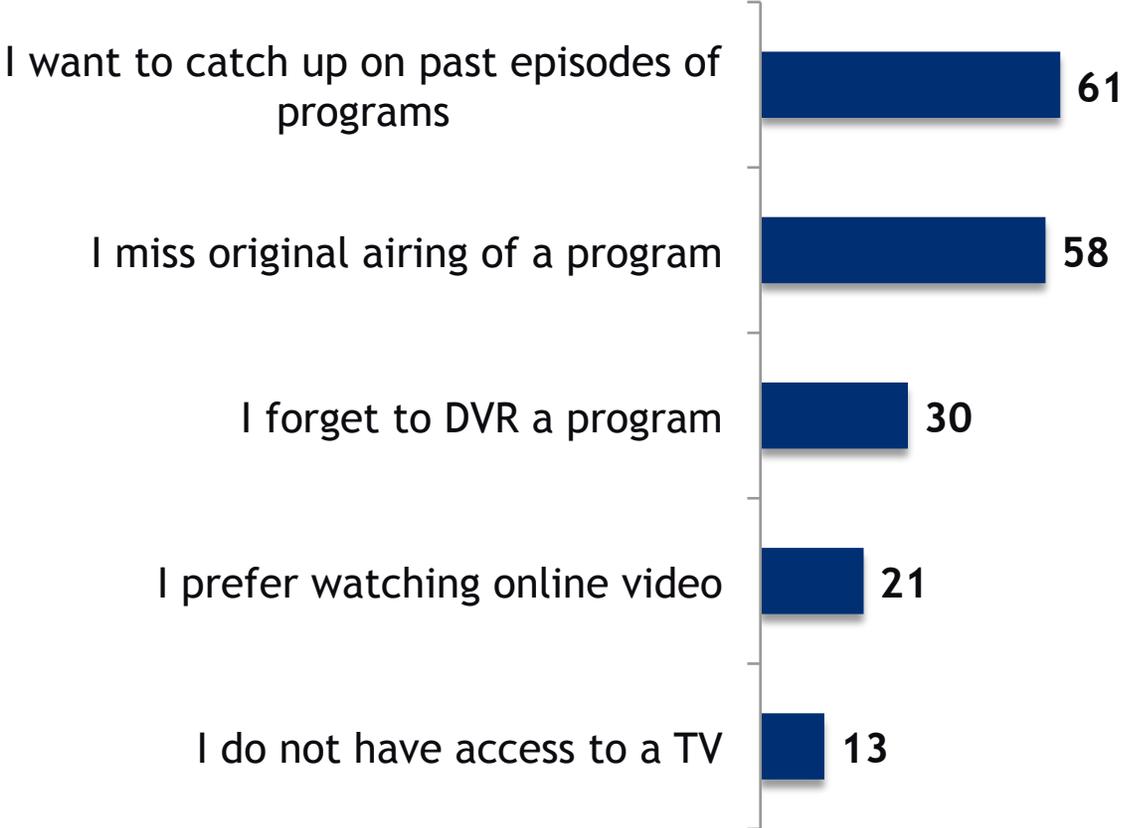


85% of A18-49 have watched a full length TV show online

865 How often do you watch full-length television shows online?
860 How often do you watch user-generated video clips on Web sites such as YouTube?
905 How often do you watch video posted on social media?

Viewers Watch Online Television Programming For the Same Reasons

Reasons For Watching Full-Length TV Shows Online: A18-49

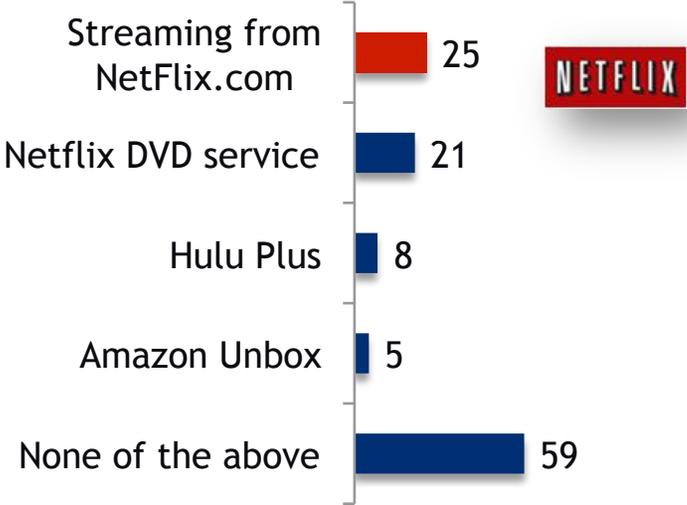


Same rank order across all demos

866 Which of the following are reasons why you watch full-length television shows online?

For Viewers Willing to Pay for Content, Netflix is the Most Popular Choice

Online Video Sites Subscribed To (A18-49)



Teens



18-24



25-34

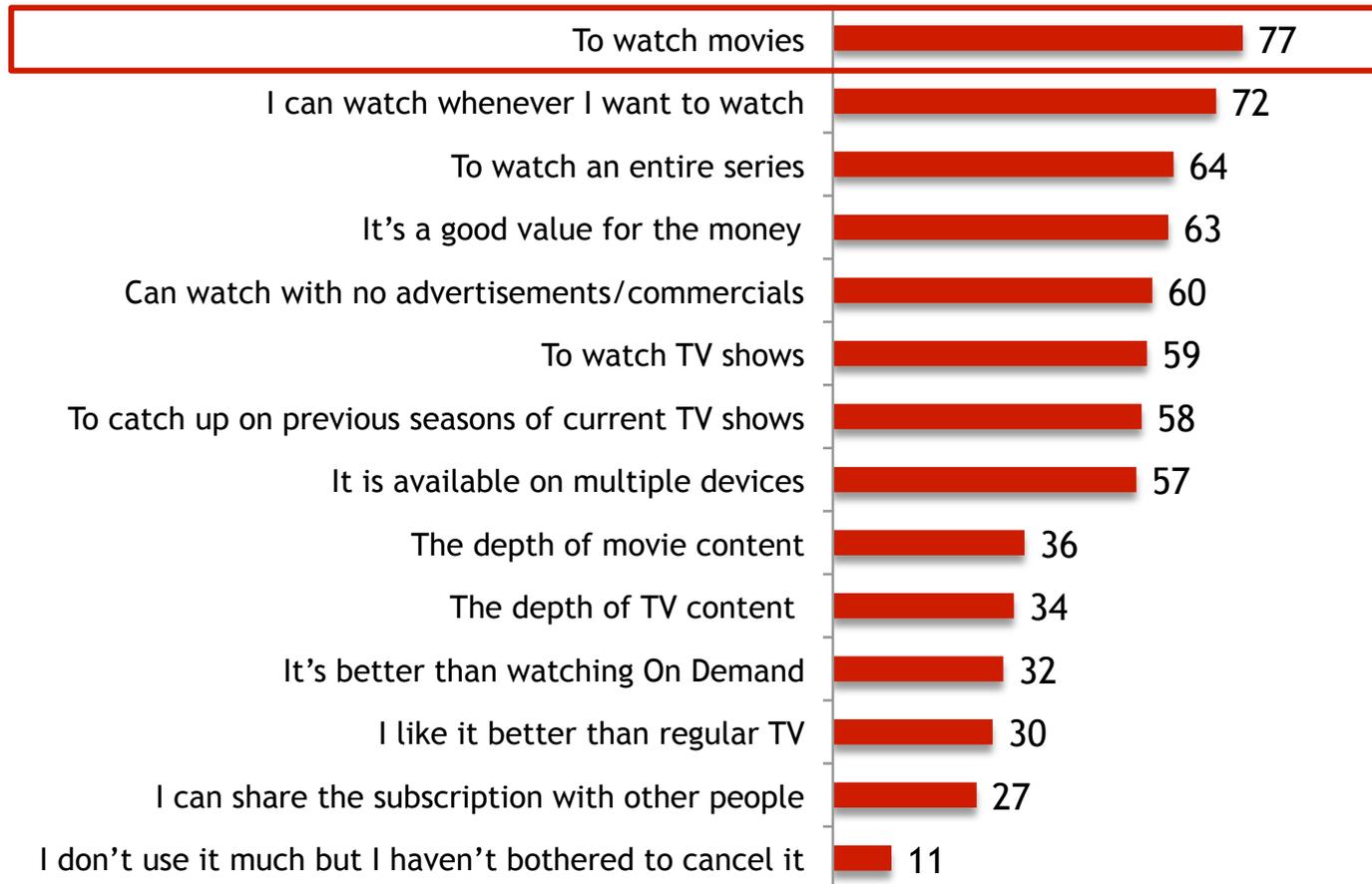
	<u>Teens</u>	<u>18-24</u>	<u>25-34</u>
Streaming from NetFlix.com	26	38	40
Netflix DVD service	22	23	30
Hulu Plus	9	16	15
Amazon Unbox	8	7	8
None of the above	56	44	39

1215 Which of the following, if any, do you subscribe to? Select all that apply.

Primary Reason to Subscribe to Netflix... Movies

However Has Starz Put them Out of the Movie Business !

Reasons For Subscribing To Netflix (A18-49)



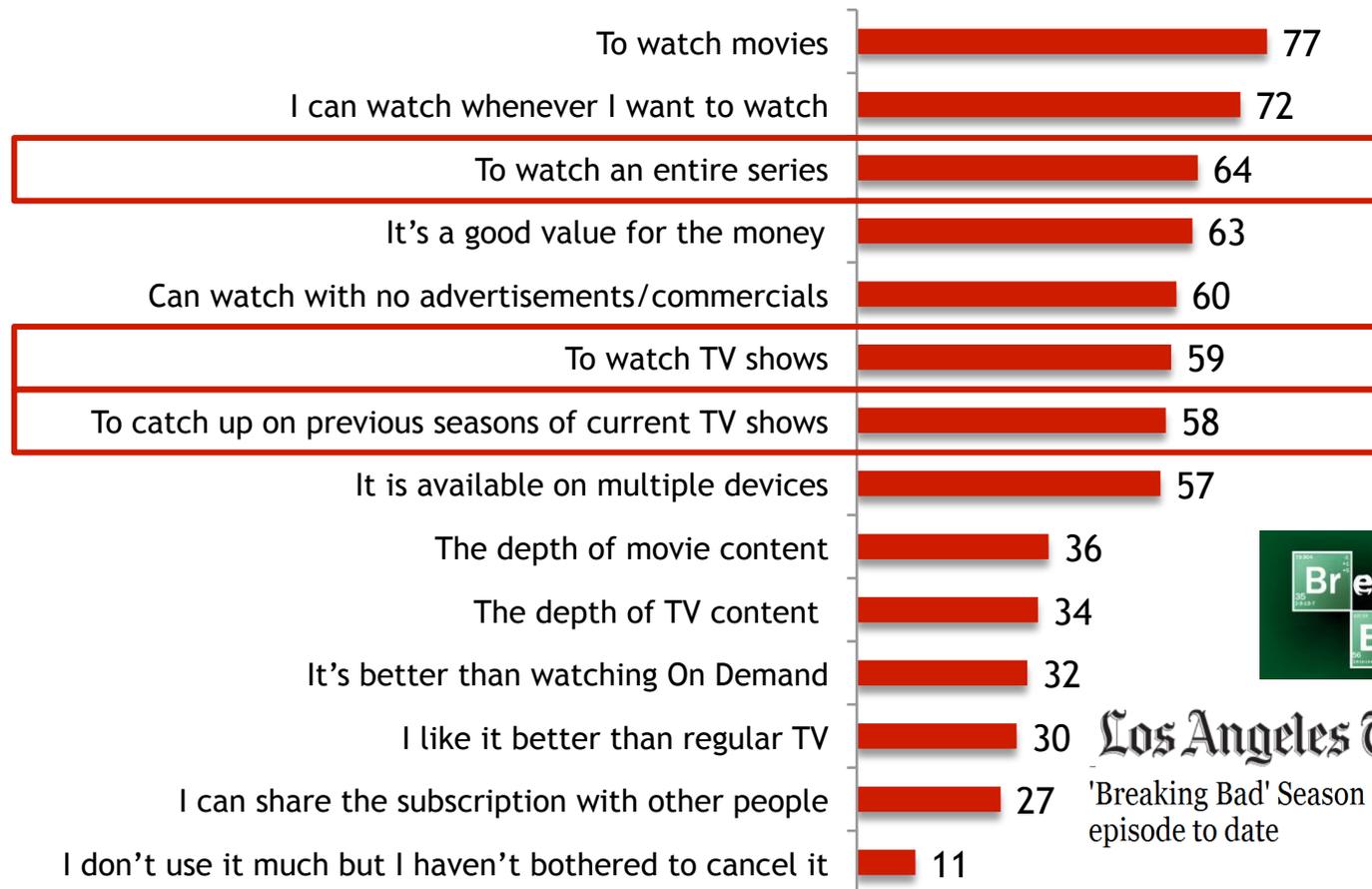
BASE: Netflix streaming subscribers

1216 Which of the following are reasons why you subscribe to streaming from NetFlix.com?

Or In Another Business...

Netflix is Very Strong With TV Shows... Both Previous Run and Originals

Reasons For Subscribing To Netflix (A18-49)



Los Angeles Times

'Breaking Bad' Season 5 premiere is most watched episode to date

BASE: Netflix streaming subscribers

1216 Which of the following are reasons why you subscribe to streaming from NetFlix.com?

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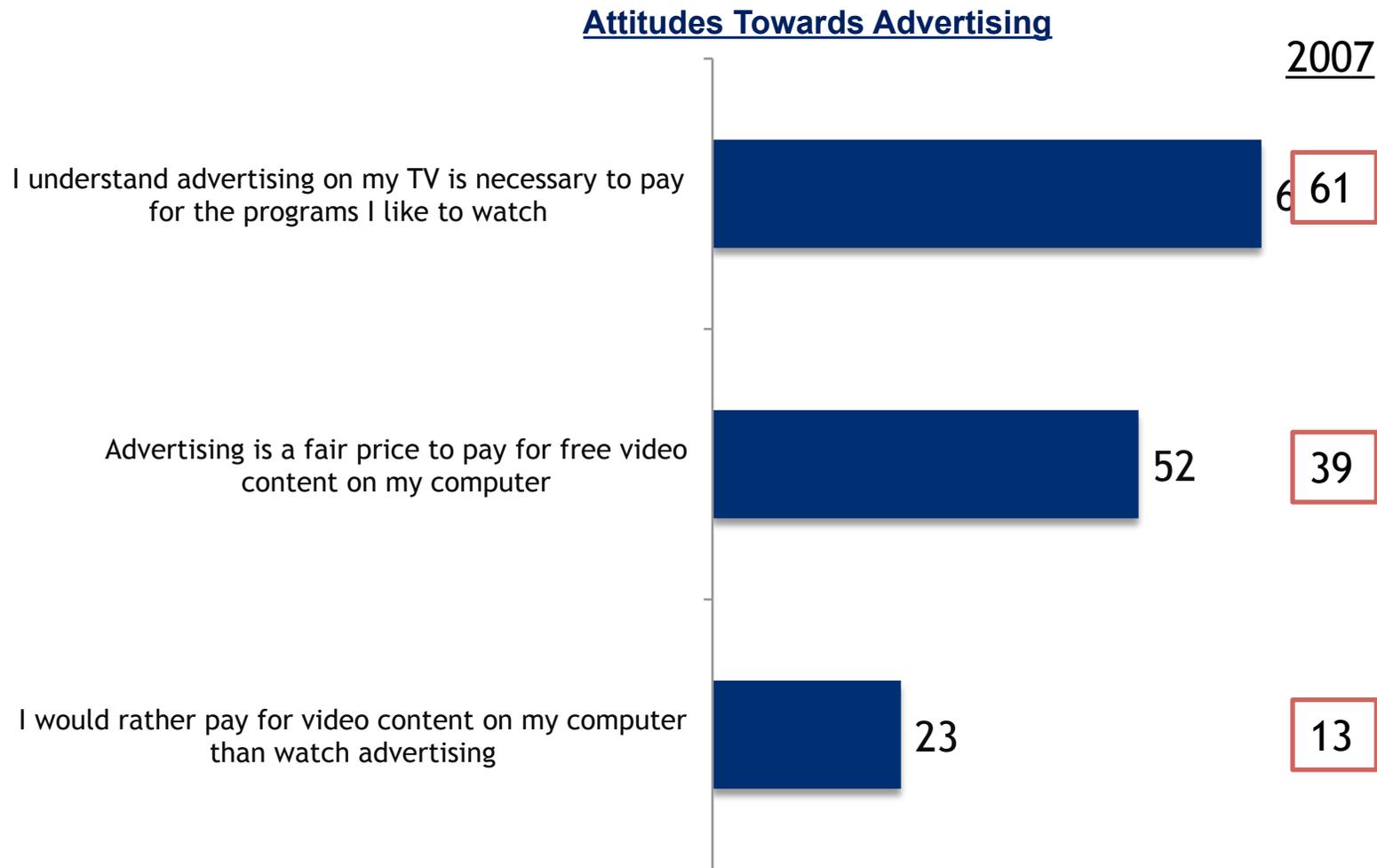
What is the Advertising Acceptance on Each Platform?



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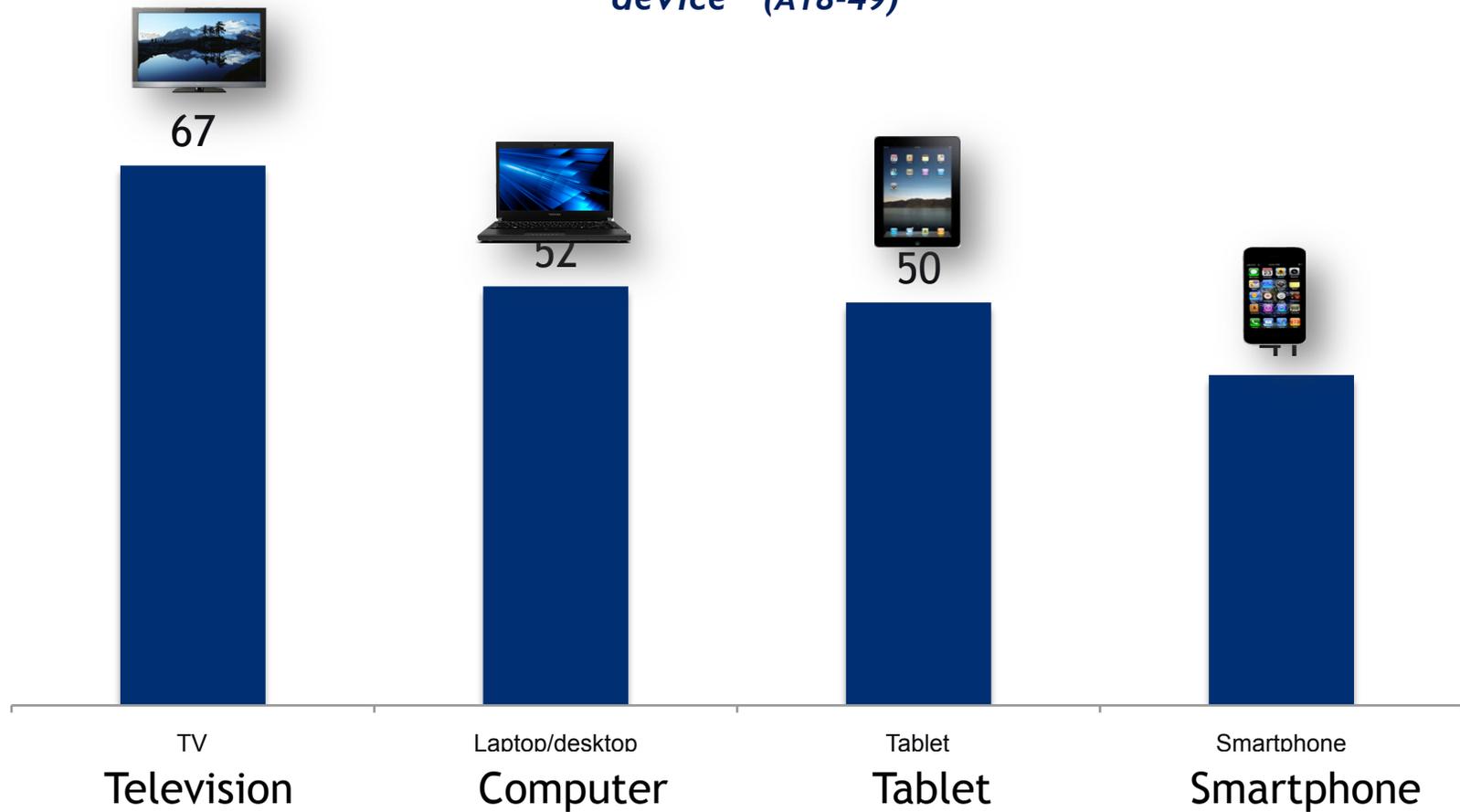
The Advertising Contract with Television & Computers Has Strengthened



1055 Please indicate the extent to which you agree with each of the statements listed below.

Surprisingly, Ads are Already Expected on the Tablet

“I expect to see advertising on this device” (A18-49)



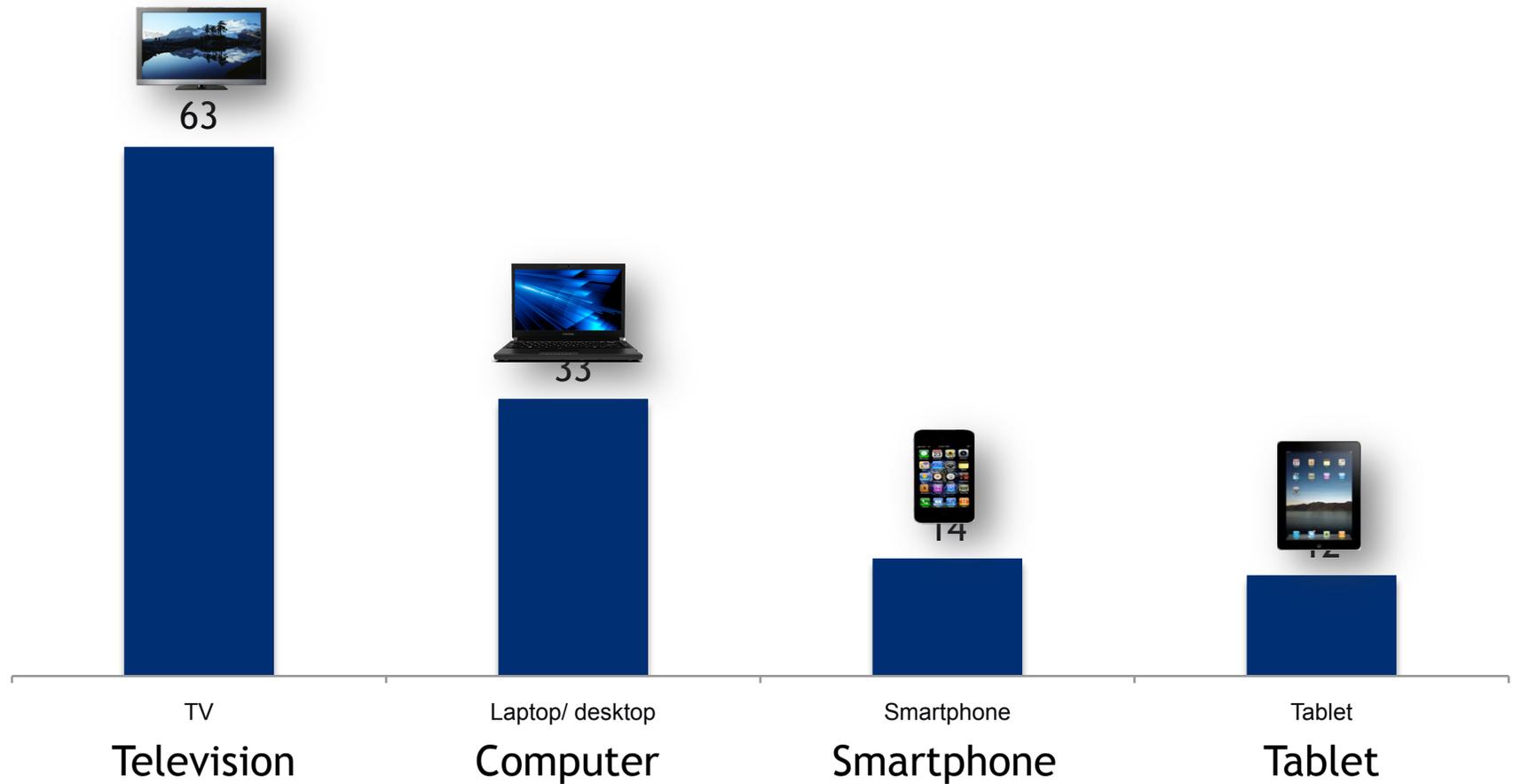
BASE: Users of each device to watch video

1050 On which of the following devices do you find advertisements least annoying?

1000/1005/1010/1015 For this question, please think about watching video on your television/laptop/desktop computer/tablet/smartphone/cell phone. How much do you agree with the following statements about advertising on your television?

Advertising Receptivity is a Different Story

Ad Receptivity by Screen size: A18-49



BASE: Users of each device to watch video
1050 On which of the following devices do you find advertisements least annoying?



CableNation



@cablenation



thecabtv



www.thecab.tv