

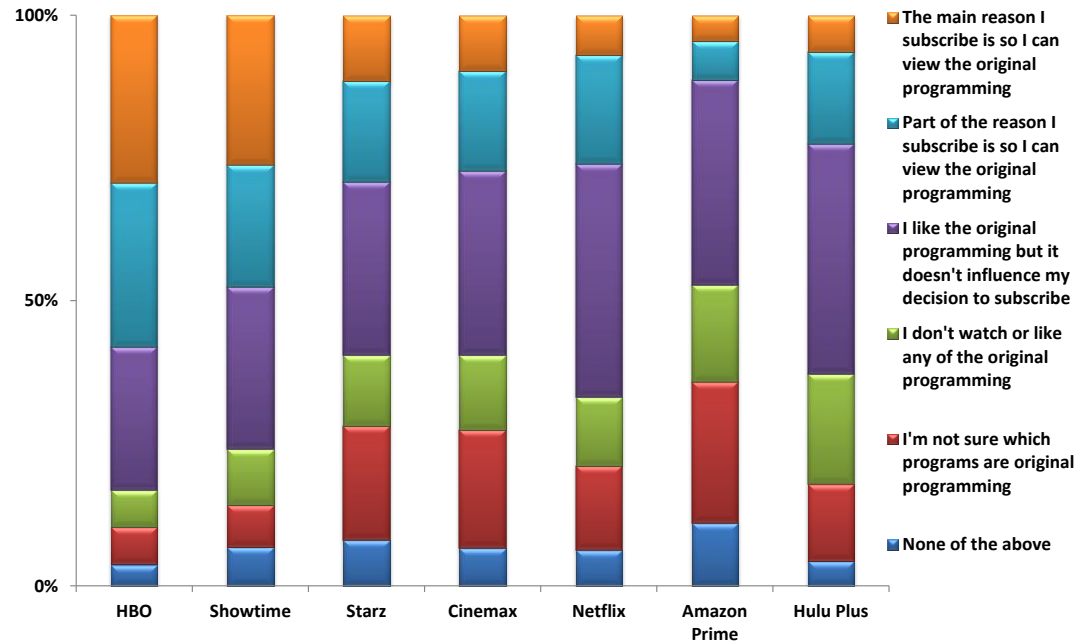
By **John Barrett**, Director, Consumer Analytics; **Brett Sappington**, Director of Research – Access & Entertainment; **Yilan Jiang**, Manager of Consumer Research; **David Mitchel**, Research Analyst; and **Ruby-Ren Dennis**, Researcher, Parks Associates

SYNOPSIS

360 View: Digital Media & Connected Consumers analyzes trends in video consumption by platform and source. It segments consumers based on their consumption habits and identifies changes in their consumption habits over the last four years and changes in the relative size of each segment. The analysis includes a detailed profile of each segment and their attitudes towards video consumption and identifies CE devices that influence video consumption habits. The research drills down into three specific issues related to video consumption: the influence of household members on video purchase decisions, the importance of original programming, and mobile video

Influence of Original Programming on Video Subscription by Service

(Subscribers in U.S. Broadband Households)



© Parks Associates

ANALYST INSIGHT

“There are many important transitions underway in the video space. TVs are becoming the dominant platform for online video, tablets are undermining video consumption on mobile phones, and linear TV is giving way to on-demand video.”

— **John Barrett**, Director, Consumer Analytics, Parks Associates

About the Research

Previous Research

- The Streaming CE and Content Purchasing Habits (Q1/14)
- Trends in Content Licensing (Q1/14)
- New Trends in Digital Delivery and CDNs (Q1/14)
- User Interfaces: The Battleground for Video Services (Q4/13)
- OTT Video Buyers: Subscriptions & Transactions (Q4/13)
- Content Search, Discovery & Recommendations (Q3/13)

Segmentation Overview

Key Findings

Recommendations

Overview of Video Consumption

- Use of Device for Video (2010 - 2014)
- Frequency Use of Device for Video (2010 - 2014)
- Video Consumption by Platform (2010 - 2014)
- Video Consumption on TV Sets by Source (2010 - 2014)
- Hours of Internet Video Consumption: TVs vs. Computers (2012 - 2014)

Overview of Video Viewing Segments

- Parks Associates Multiscreen Segmentation
- Video Viewing Segments (Q1/14)
- Segment Descriptions
- Segment Demographics
- Age by Segment (Q1/14)
- Marital Status by Segment (Q1/14)
- Type of Residence by Segment (Q1/14)

Device Adoption Among Video Viewing Segments

- Internet-Connected CE Adoption by Video Viewing Segments (2012-2014)
- Gaming Console Adoption by Video Viewing Segments (2012-2014)
- Streaming Media Device Adoption by Video Viewing Segments (2012-2014)
- PC-to-TV Connection by Video Viewing Segments (2012-2014)

CONTENTS

- DVR Adoption by Video Viewing Segments (2013-2014)
- Smartphone Adoption by Video Viewing Segments (2012-2014)
- Tablet Adoption by Video Viewing Segments (2012-2014)

Video Service Adoption Among Video Viewing Segments

- Pay-TV Subscribers by Segment (Q1/14)
- Pay-TV Adoption by Video Viewing Segments (2012-2014)
- Video Viewing Segments by Providers (Q1/14)
- TV Everywhere Awareness by Segment (Q1/14)
- Use of Paid VOD by Segment (Q1/14)
- Over-the-top Video Service Adoption by Video Viewing Segments (2013-2014)
- Avg. Incremental Video Spending by Video Viewing Segment (Q1/14)

Video Consumption Trends by Video Viewing Segments

- Video Viewing Segments (2010-2014)
- Volume of Video by Segment (Q1/14)
- Hours of Video Consumption on Platform by Video Viewing Segments (Q1/14)
- Platform Share of Total Video Consumption by Video Viewing Segments (Q1/14)
- Hours of Internet Video Consumed on Platform by Video Viewing Segments (Q2/14)
- % of All Internet Video Consumed on Platform by Video Viewing Segments (Q2/14)
- Total Hours of Video Consumed on TV by Video Viewing Segments (2010-2014)
- Hours of Video Consumed on TV Set by Video Viewing Segments (Q1/14)
- Hours of Broadcast Channels Consumed on TV by Video Viewing Segments (2010-2014)
- Linear Viewing on TV Set by Video Viewing Segments (2012-2014)
- Hours of Internet Video Consumed on TV by Video Viewing Segments (2010-2014)
- Hours of DVR Video Consumed on TV by Video Viewing Segments (2010-2014)
- Hours of DVD/Blu-ray disc Video Consumed on TV by Video Viewing Segments (2010-2014)
- Total Hours of Video Consumed on Computer by Video Viewing Segments (2010-2014)
- Hours of Streamed Internet Video Consumed on Computer by Video Viewing Segments (2012-2014)
- Hours of Video Files Consumed on Computer by Video Viewing Segments (2012-2014)
- Total Hours of Video Consumed on Mobile Phone and Tablet by Video Viewing Segments (2010-2014)
- Total Hours of Video Consumed on Mobile Phone by Video Viewing Segments (2010-

CONTENTS

2014)

- Total Hours of Video Consumed on Tablet by Video Viewing Segments (2010-2014)

Internet Video Genre by Platform

- Genre of Internet Video Consumed by Platform (Q1/14)
- Genre as % of All Streamed Internet Video Consumed on a Computer by Age (Q1/14)
- Genre as % of All Internet Video Consumed on a TV Set by Age (Q1/14)
- Genre as % of All Internet Video Consumed on a Tablet by Education (Q1/14)
- Genre as % of All Streamed Internet Video Consumed on a Mobile Phone by Age (Q1/14)
- Genre as % of All Streamed Internet Video Consumed on a Computer by Video Viewing Segment (Q1/14)
- Genre as % of All Internet Video Consumed on a Tablet by Video Viewing Segment (Q1/14)
- Genre as % of All Streamed Internet Video Consumed on a Mobile Phone by Video Viewing Segment (Q1/14)

Attitudes Towards Video Consumption

- Video Consumption Attitudes (Q1/14)
- Video Consumption Attitudes by Age (Q1/14)
- Video Consumption Attitudes by Gender (Q1/14)
- Video Consumption Attitudes by Annual Video Spending (Q1/14)
- Video Consumption Attitudes by Pay-TV Subscription (Q1/14)
- Video Consumption Attitudes by Video Viewing Segment (Q1/14)
- Video Viewing Preferences (Q1/14)
- Video Viewing Preferences by Age (Q1/14)
- Video Viewing Preferences by Gender (Q1/14)
- Video Viewing Preferences by Annual Video Spending (Q1/14)
- Video Viewing Preferences by Annual Video Spending (Q1/14)
- Video Viewing Preferences by Video Viewing Segment (Q1/14)

Video Influencers & Dominant Viewers

- Breakdown of Family Structure (Q1/14)
- Video Consumption on Platform by Family Structure (Q1/14)
- Video Consumption on a TV Set by Family Structure (Q1/14)
- Video Segmentation by Family Structure (Q1/14)
- Family Influence on Video Purchase Decisions (Q1/14)

CONTENTS

- Family Influence on Video Purchase Decisions by Family Structure (Q1/14)
- Influence of Spouse on Video Purchase Decisions by Income (Q1/14)
- Influence of Spouse on Video Purchase Decisions by Education (Q1/14)
- Influence of Others Over 18 on Video Purchase Decisions by Age (Q1/14)
- Influence of Minors on Video Purchase Decision by Age of Minor (Q1/14)
- Family Influence on Video Purchase Decisions by Video Viewing Segments (Q1/14)
- Influence on Spending in the Household by Segment (Q1/14)
- Dominant Household Video Viewers (Q1/14)
- Dominant Household Video Viewers by Family Structure (Q1/14)
- Video Consumption of Children: Urban vs. Rural (Q1/14)
- Dominant Household Video Viewers by Segment (Q1/14)
- Dominant Household Viewer and Influence on Video Purchase Decisions (Q1/14)

Importance of Original Programming

- Reason for Subscribing to Video Service (Q1/14)
- Reasons for Subscribing to Video Subscription Service by Age (Q1/14)
- Influence of Original Programming on Video Subscription by Service (Q1/14)
- Importance of Original Programming in Subscription Decision Making by Age (Q1/14)
- Percentage of Video Viewing Segments with at Least One Subscription Service (Q1/14)
- Reasons for Subscribing to Video Subscription Service by Video Viewing Segments (Q1/14)
- Influence of Original Programming in Video Subscription by Video Viewing Segment (Q1/14)

Genre Desired for Mobile Video

- Video Consumption on Smartphone or Tablet (Q2/14)
- Use of TV Show or Channel App (Q1/14)
- Top Three Programming Choices for Smartphone or Tablet Viewing (Q2/14)
- Top Three Programming Choices for Smartphones/Tablets by Age (Q2/14)
- Top Three Programming Choices for Smartphones/Tablets by Income (Q2/14)
- Top Three Programming Choices for Smartphones/Tablets by Gender (Q2/14)
- Top Three Programming Choices for Smartphones/Tablets by Education (Q2/14)
- Interest in Content App by Genre (Q2/14)
- Interest in Genre of Content Apps by Age (Q2/14)
- Interest in Genre of Content Apps by Income (Q2/14)



Digital Media & Connected Consumers

360 VIEW

SERVICE: DIGITAL MEDIA

2Q 2014

CONTENTS

- Interest in Genre of Content Apps by Gender (Q2/14)
- Interest in Genre of Content Apps by Education (Q2/14)

Additional Research from Parks Associates

ATTRIBUTES

Parks Associates
15950 N. Dallas Pkwy
Suite 575
Dallas TX 75248

TOLL FREE 800.727.5711

PHONE 972.490.1113

FAX 972.490.1133

parksassociates.com

sales@parksassociates.com

Authored by John Barrett, Brett Sappington, Yilan Jiang, David Mitchel, and Ruby-Ren Dennis
Executive Editor: Tricia Parks

Number of Slides: 148

Published by Parks Associates

© 2014 Parks Associates | Dallas, Texas 75248

All rights reserved. No part of this book may be reproduced, in any form or by any means, without permission in writing from the publisher.

Printed in the United States of America.

Disclaimer

Parks Associates has made every reasonable effort to ensure that all information in this report is correct. We assume no responsibility for any inadvertent errors.