

Gen V Research

Men 18-34

The On-Demand Video Consumer
May 1, 2012



Who is Generation V?

1

Over the past five years, new devices and media offerings have created a sea change in how we engage with media, particularly video.

2

Consumers now expect to be able to find the video content that they want any time, any where – they prefer on-demand video, which often includes quick “video hits” of shorter form content throughout the day versus planned viewing.

3

On-demand video has an expanded role in the lives of **Gen V** users. On-demand TV and time-shifting often replaces traditional TV. They watch online video for information, entertainment and exploration – across devices and often as a shared experience

4

Gen V is a psychographic profile that cuts across demographic groups. However, they are more likely to be found within certain segments:

Men 18–34

Women 18–49

Teens
(coming soon)

Multicultural
(coming soon)

Background and Objectives



- ▶ Young men (M18-34 and in particular M18-24) are strong adopters of Gen V behaviors

- ▶ They have radically shifted their media habits to accommodate new devices and platforms that fit into their lifestyle

- ▶ In this study we explore how they consume media today, and how online videos and YouTube in particular fit into their media ecosystem

Methodology: Understanding Gen V



- ▶ **Survey:** Custom survey was fielded to the Nielsen representative panel in February 2011. The survey was fielded online and was completed by 1,733 online adults with 350 M18-34
- ▶ **Behavioral data:** Behavioral analyses drew from various panels from Nielsen including:
 - Nielsen's single source panel of 25,000 persons with both internet and TV measurement
 - Nielsen's TV panel of 55,000 persons
 - Nielsen's online panel of internet and online video viewing of 200,000 persons



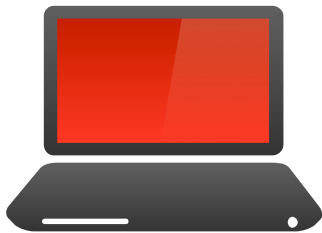
- ▶ **Ethnography:** 10 In-home "friendship groups" with M18-34 in LA and Chicago, February 2012

Rapidly shifting media landscape

Technology is enabling on-demand viewing for all consumers

Q3 2008 – Q3 2011

Watching video
on the internet



+22%

In users

+80%

time spent
among users

Watching
time shifted TV



+66%

In users

+66.1%

time spent
among users

Watching video
on a mobile phone



+206%

In users

+20%

time spent
among users

Gen V taking control of video viewing

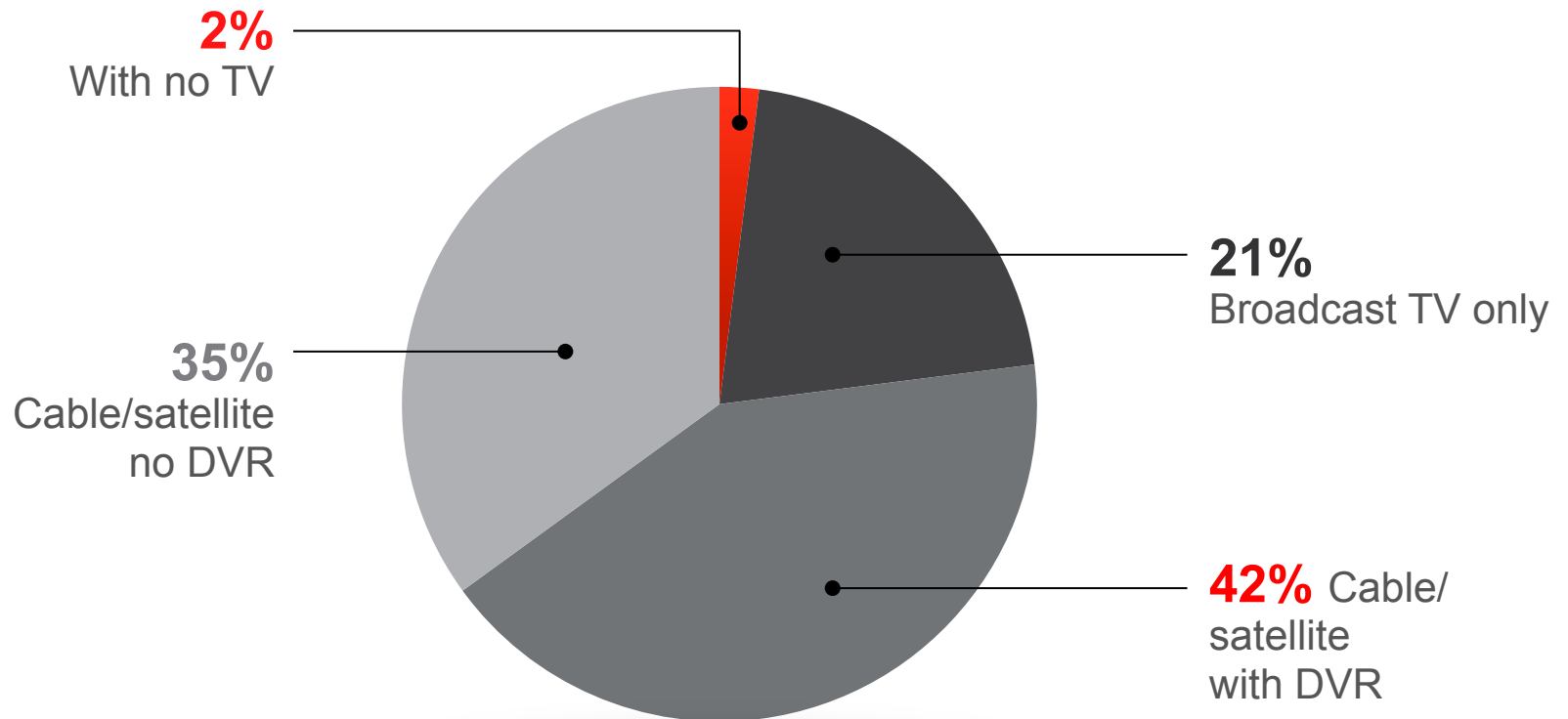
Lots of viewing options that better fit their lifestyle

Video
Men18-34
Changing Media Habits

Video can be found at
[YouTube.com/user/advertise](https://www.youtube.com/user/advertise)

M18-34 are increasingly difficult to reach through broadcast TV

Only 1/3 have cable/satellite and no ability to time shift

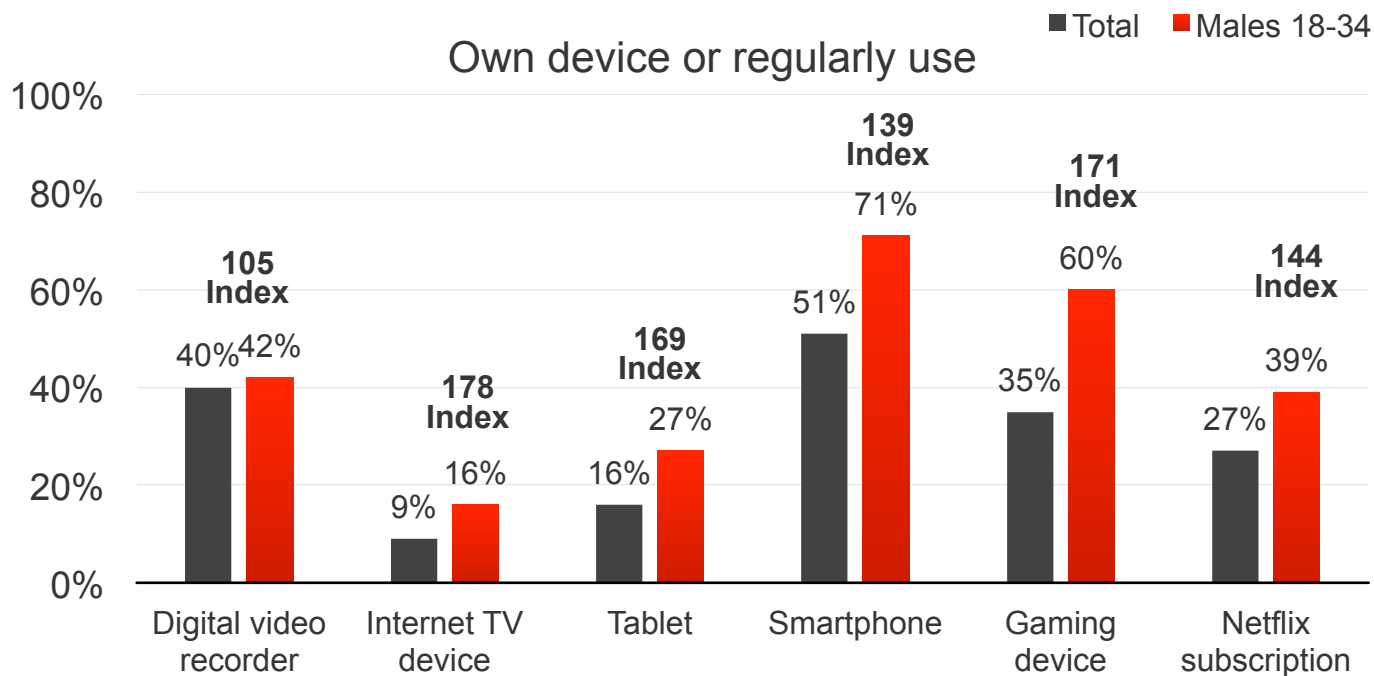


* Only 15% of total adults have broadcast TV only

Base: Have a TV / Q7. What type of TV service do you have?
Source: Google Generation V Survey

M18-34 are early adopters of media technology

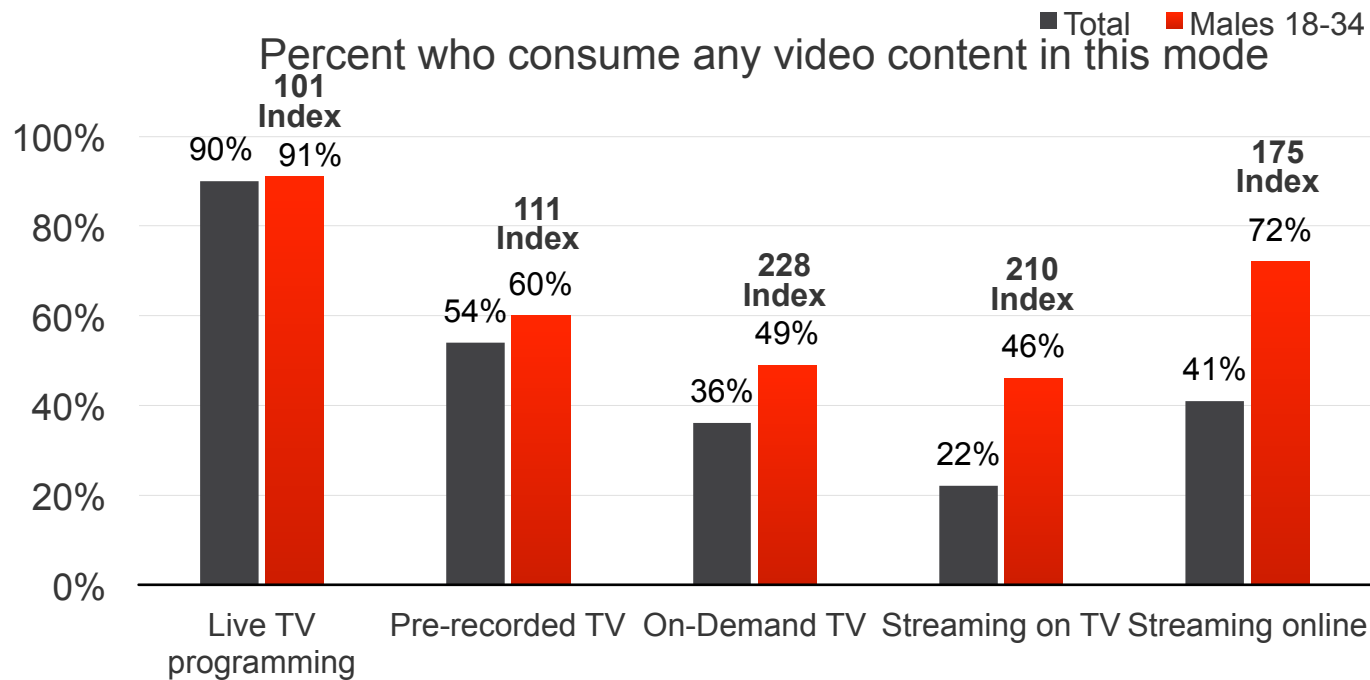
More likely to own time and location shifting devices



Base: Total Respondents | Q3. Do you own/regularly use the following devices (devices listed in chart above)?
Source: Google Generation V Survey

M18-34 are twice as likely to stream on TV

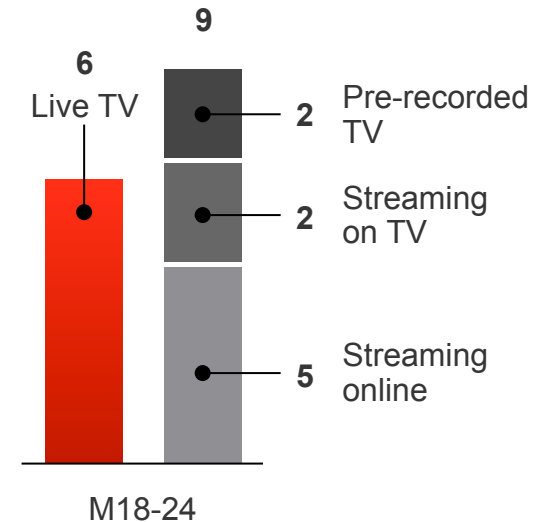
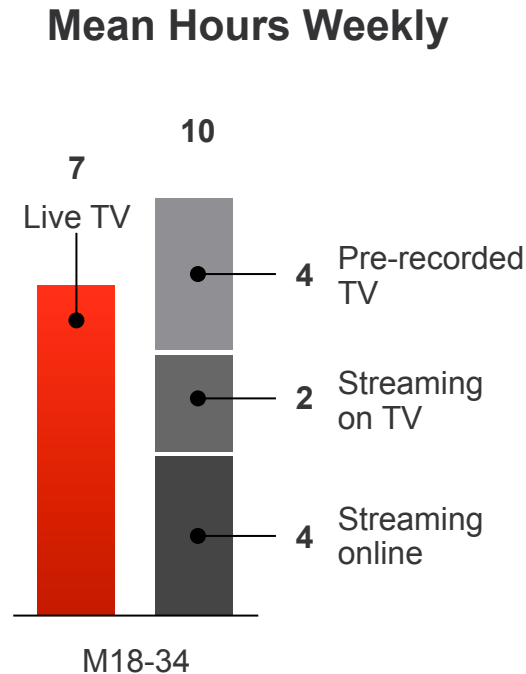
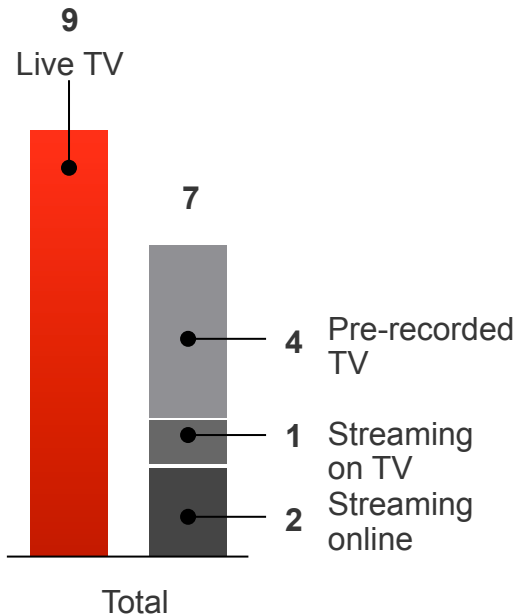
Online streaming has surpassed DVR and on demand among Gen V



Base: Total Respondents | Q8. How many hours a week do you spend doing the following activities (activities listed above in chart)?
Source: Google Generation V Survey

M18-34 spend more time with time shifted and streaming video than live TV

Total time Streaming exceeds time with live TV among M18-24



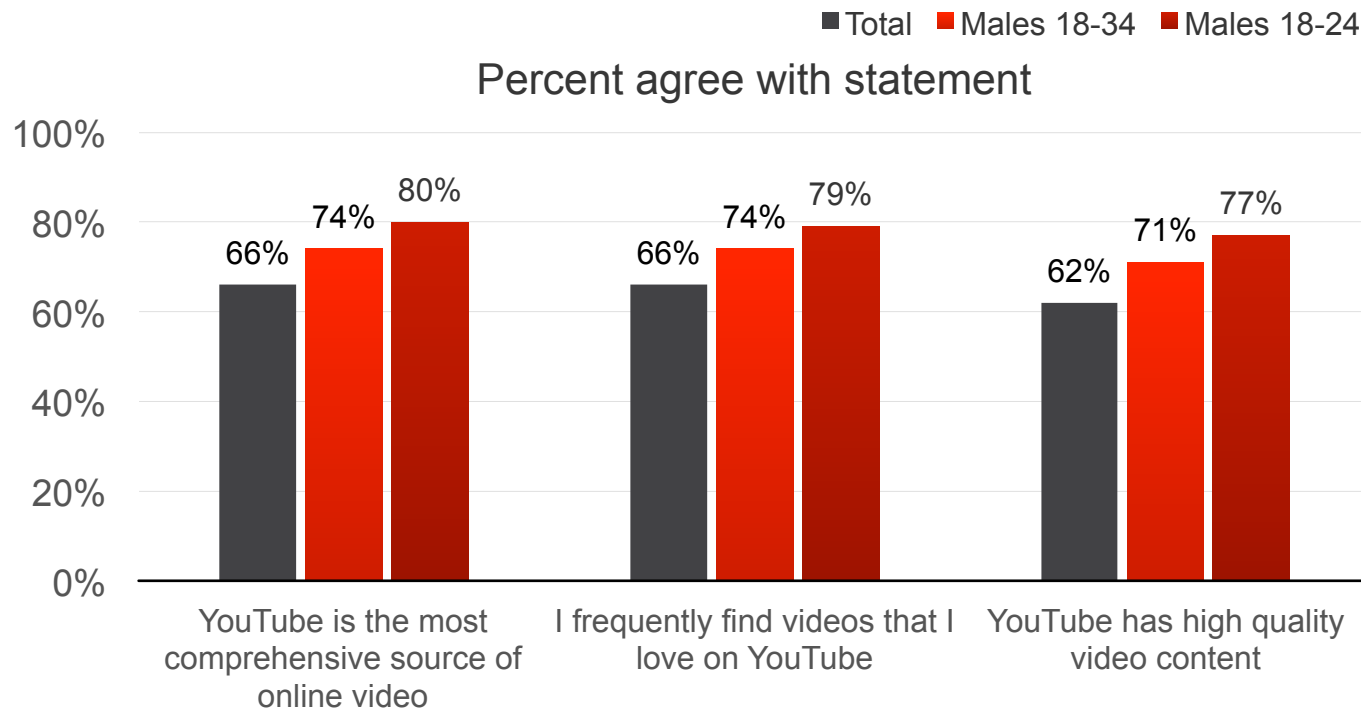
Base: Total Respondent / Q8. How many hours a week do you spend doing the following activities (activities listed above in chart)?
Source: Google Generation V Survey

YouTube is **Loved** for Its Diverse Content

Many M18-34 turn to YouTube for How-to & Educational video



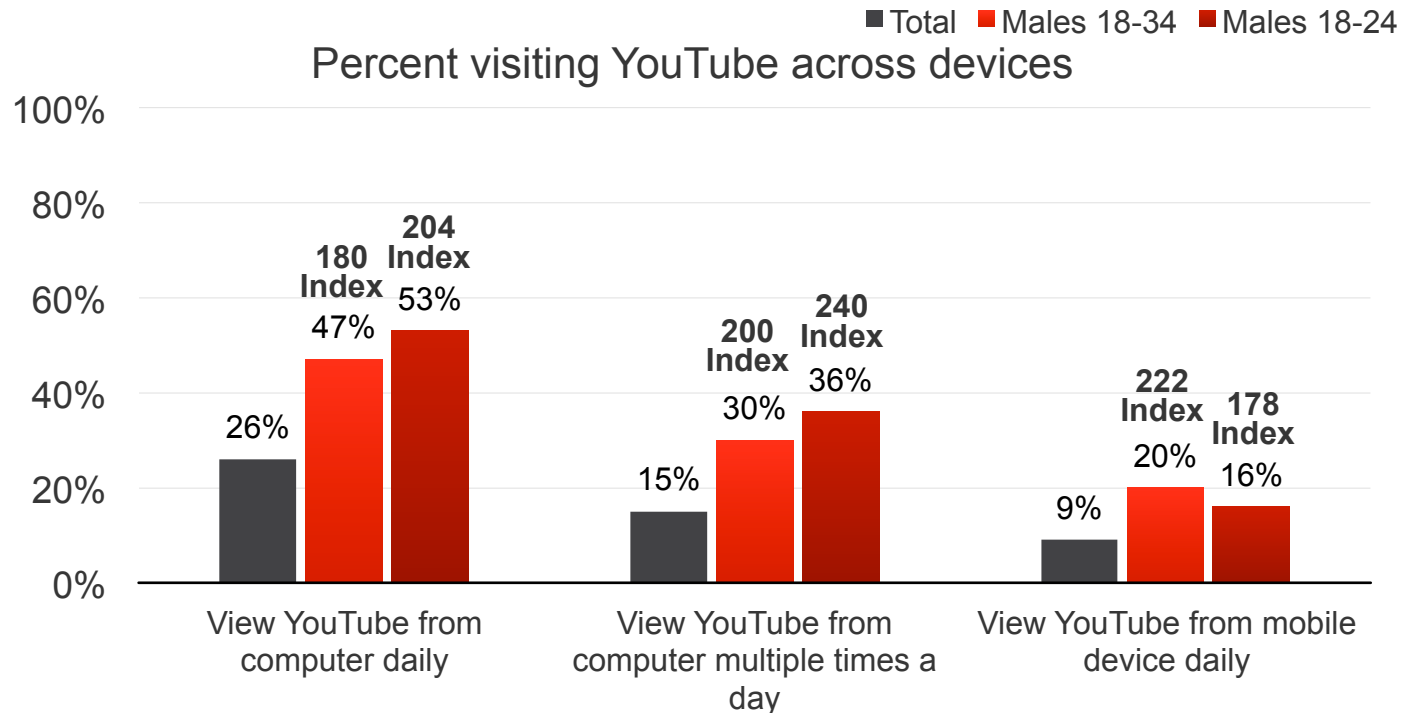
M18-34 **love** the breadth, depth and quality of YouTube videos



Base: YouTube users / Q26a. Do you agree with the following statements regarding YouTube?
Source: Google Generation V Survey

1 in 3 visit YouTube multiple times daily

1 in 5 M18-34 view YouTube on mobile daily



Base: Recently viewed YouTube: Owns a computer / Q21_1 How often do you visit YouTube from a computer?

Base: Recently viewed YouTube: Owns a mobile phone / Q21_2 How often do you view YouTube from a mobile phone?

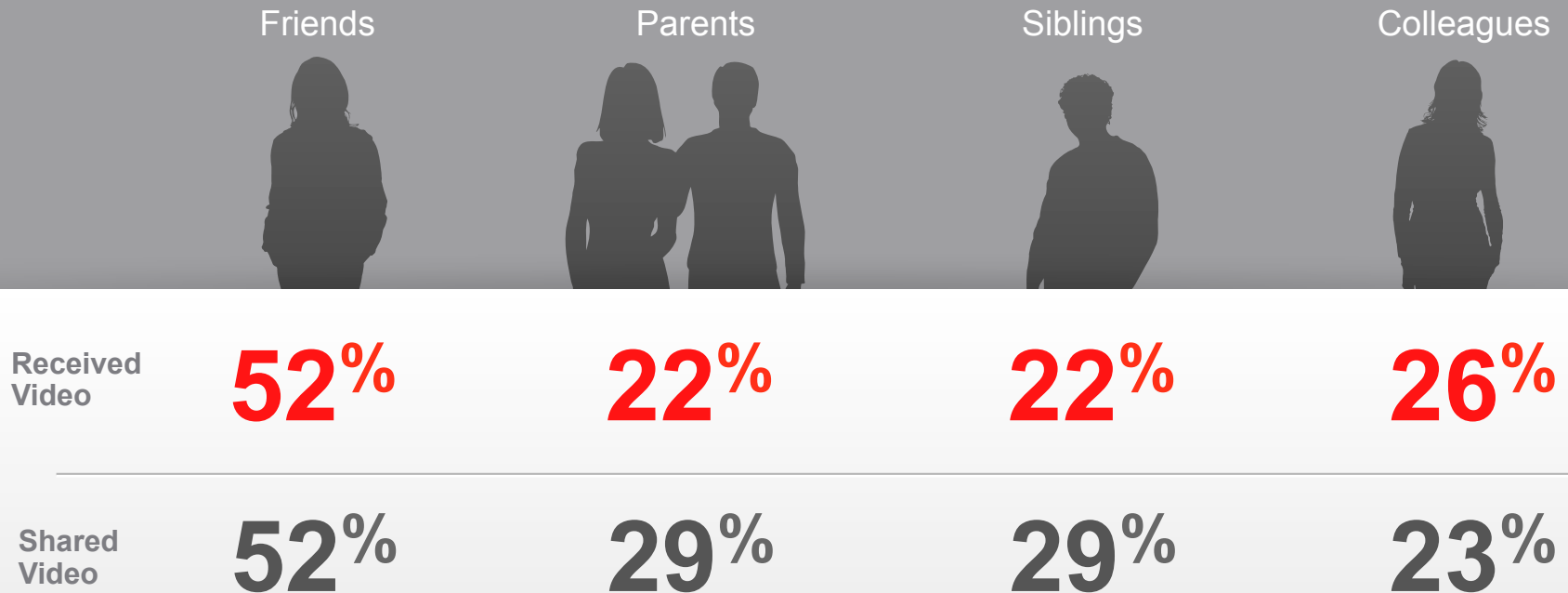
Base: Recently viewed YouTube / Q21. How often do you view YouTube from any device.

Source: Google Generation V Survey

M18-34 both share and receive videos regularly with their networks

Almost twice as likely to share with colleagues as P18+

In the past month...



Base: Views Online Video Content / Q12a. In the past month, who shared video content with
Base: Views Online Video Content / Q12b. In the past month, who did you share online video content with?
Source: Google Generation V Survey

YouTube is frequently shared in person

Discovering videos first can be important for social status

Video
Men18-34
Sharing YouTube Videos

Video can be found at
[YouTube.com/user/advertise](https://www.youtube.com/user/advertise)

YouTube is the Most Shared Content on Facebook

People tell friends about YouTube content more than any other media

Monthly unique facebook visitors who click directly to these sites



YouTube



The Washington Post

msn

The New York Times
Expect the World®

THE HUFFINGTON
POST

FOX
NEWS
Channel

B

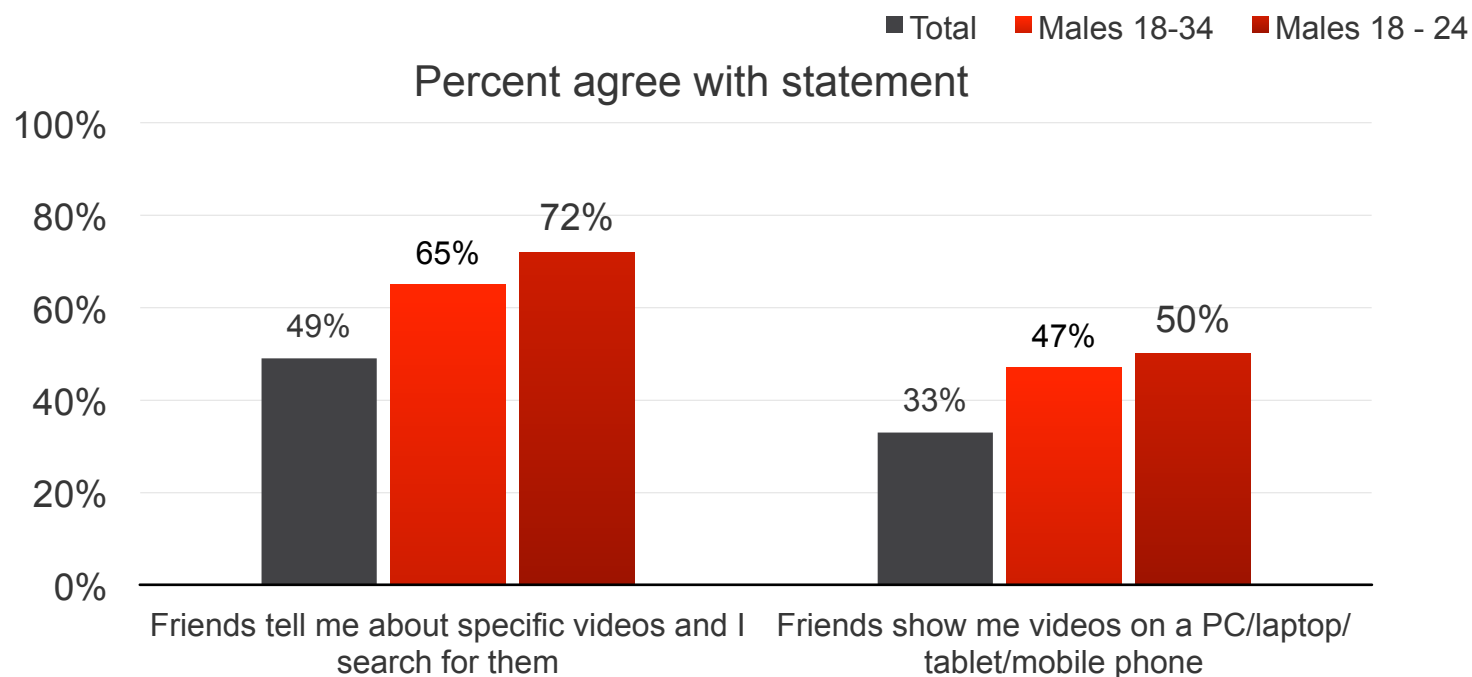
W

CNN

Nielsen NetView: Destination Domain by Click Report Dec 2011; % UA of the site

Online video content is the new water cooler

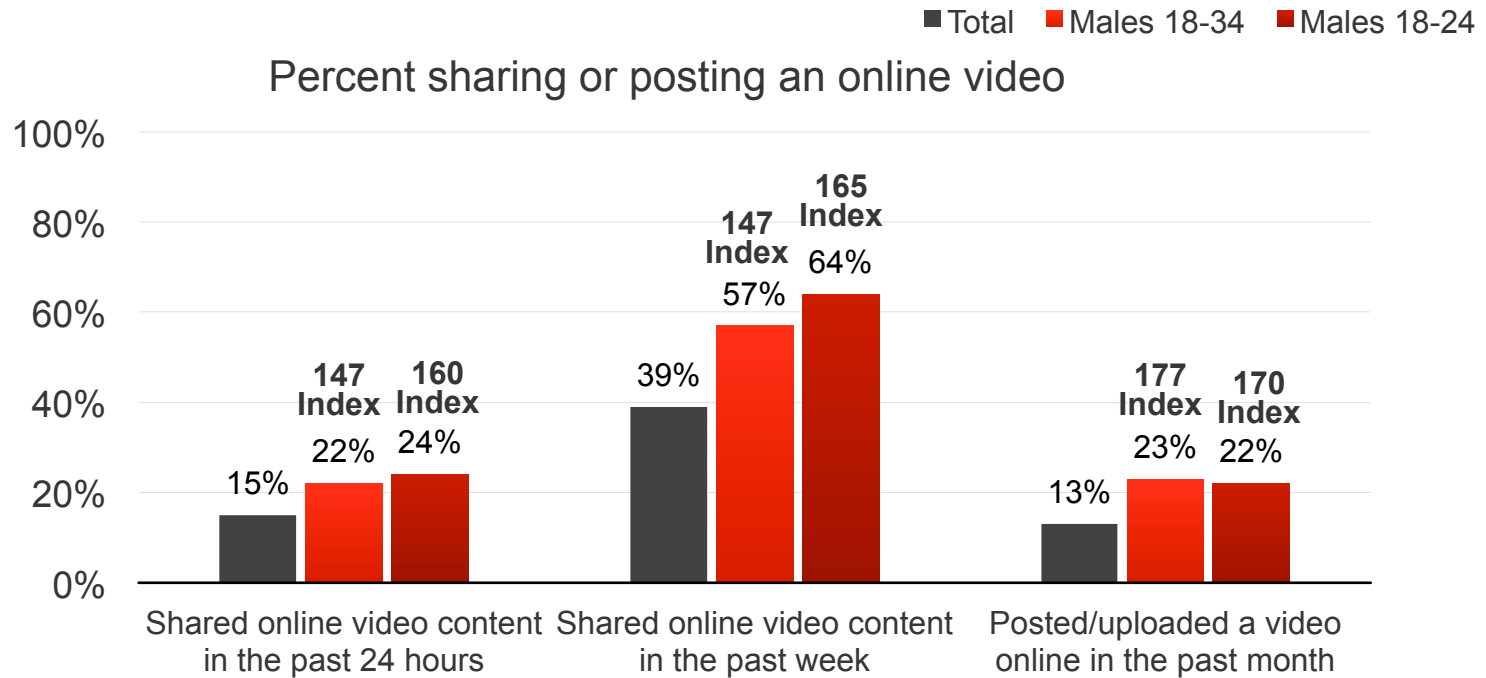
Half of M18-34 look at videos with friends in person



Base: Views Online Video Content / Q15. In what ways do you hear about online video?
Source: Google Generation V Survey

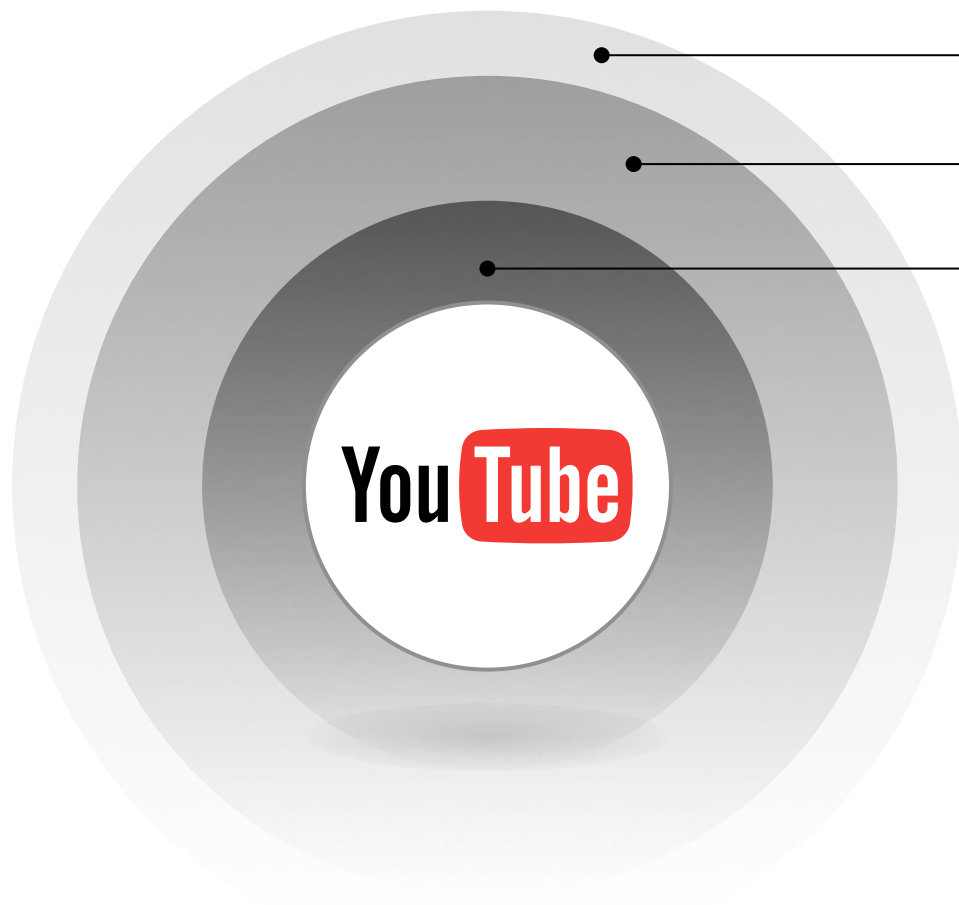
2/3 of M18-34 shared an online video in the past week

1 in 4 uploaded their own video in the past month



Base: Views Online Video Content | Q16 When did you last share/send online video content with others?
Q19: When did the respondent last upload/post an original video?
Source: Google Generation V Survey

Half of M18-34 subscribe to specific YouTube channels or content creators



58% M18-24 subscribe

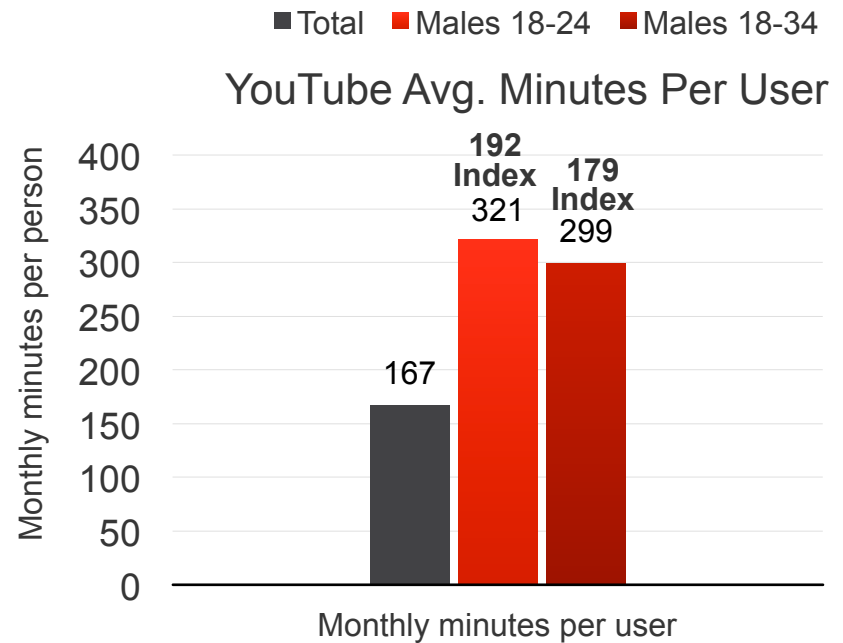
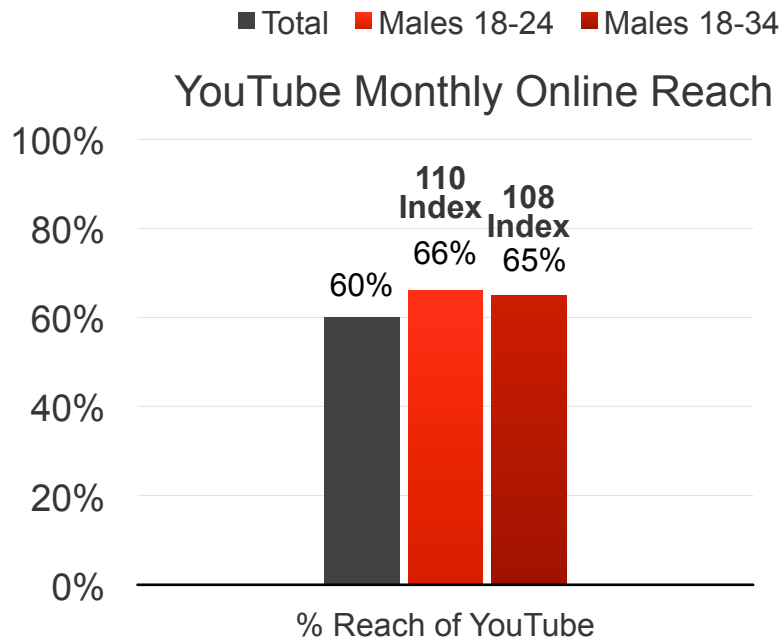
48% M18-34 subscribe

32% P18+ subscribe to channels

40% of M18-34 actively seek out videos related to their particular passions or hobbies

2/3 of M18-24 use YouTube monthly

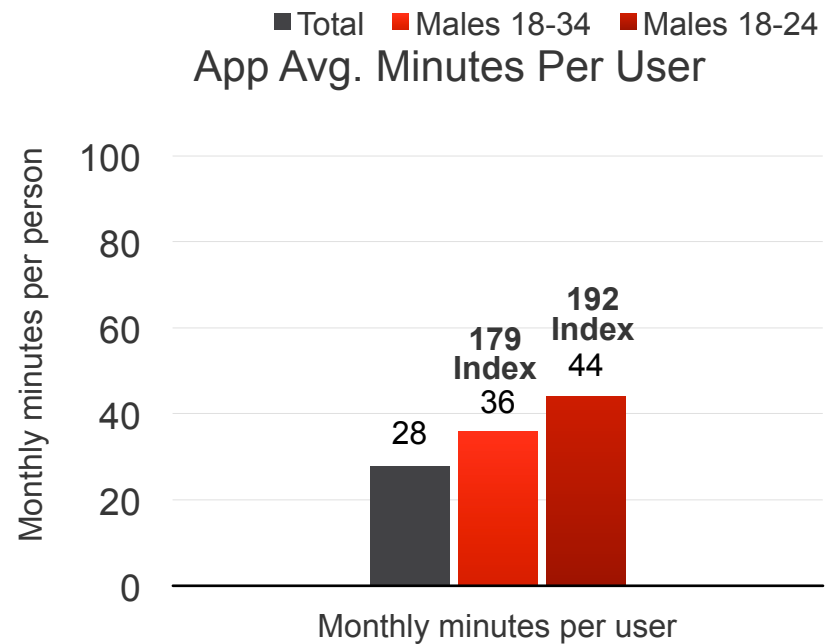
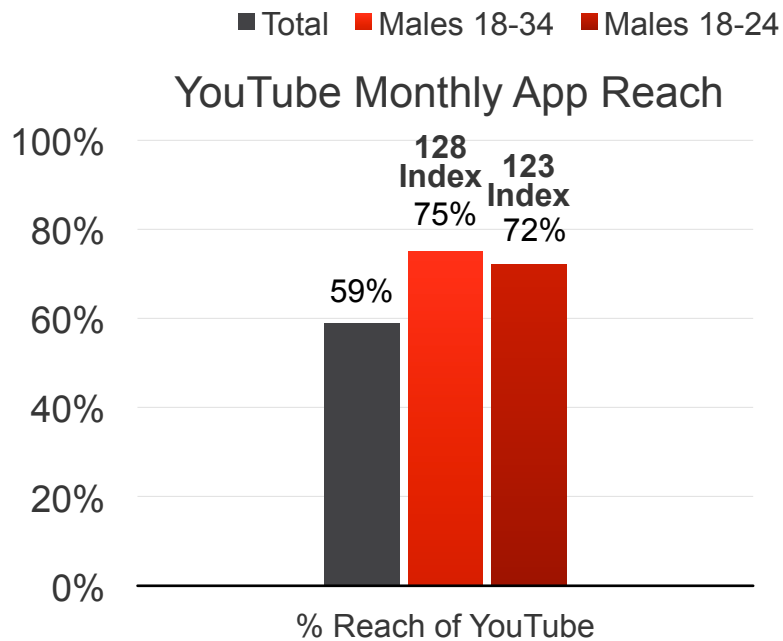
M18-24 spend twice as much time monthly as P18+



* Indices are based off P18+ | Source: Video Census. December 2011, Total Daypart

3 in 4 M18-34 smartphone owners use YouTube Mobile App monthly

M18-24 spend twice as much time with the app monthly as P18+



* Indices are based off P18+ | Source: Mobile Media Marketplace; December 2011

M18-34 are Generation V

- ▶ Men 18-34 love being in-control of their media experience
- ▶ YouTube feeds their need for real-time, comprehensive quick dips into media and provides a welcome break in the day
- ▶ The comprehensive content on YouTube can serve as a party playlist, group entertainment, education and allows them to broaden their horizons
- ▶ YouTube is Part of the Social Fabric – sharing regularly occurs through text, IM, Facebook, email and face to face conversations. It is socially acceptable to use YouTube in the workplace
- ▶ Gen V spends twice as much time on YouTube as P18+ both online and mobile

Appendix