

Gen V Research Women 25-49

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



- ▶ W25-49 (and in particular W25-34) are adopters of Gen V behaviors.

- ▶ They have radically shifted their media habits to accommodate new devices and platforms that fit into their families' 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 354 W25-49

- ▶ **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

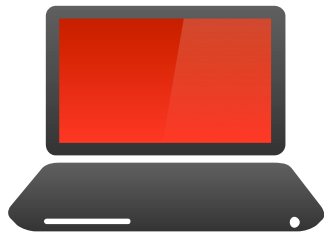


Rapidly shifting media landscape

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

W25-49 Media Habits Shift

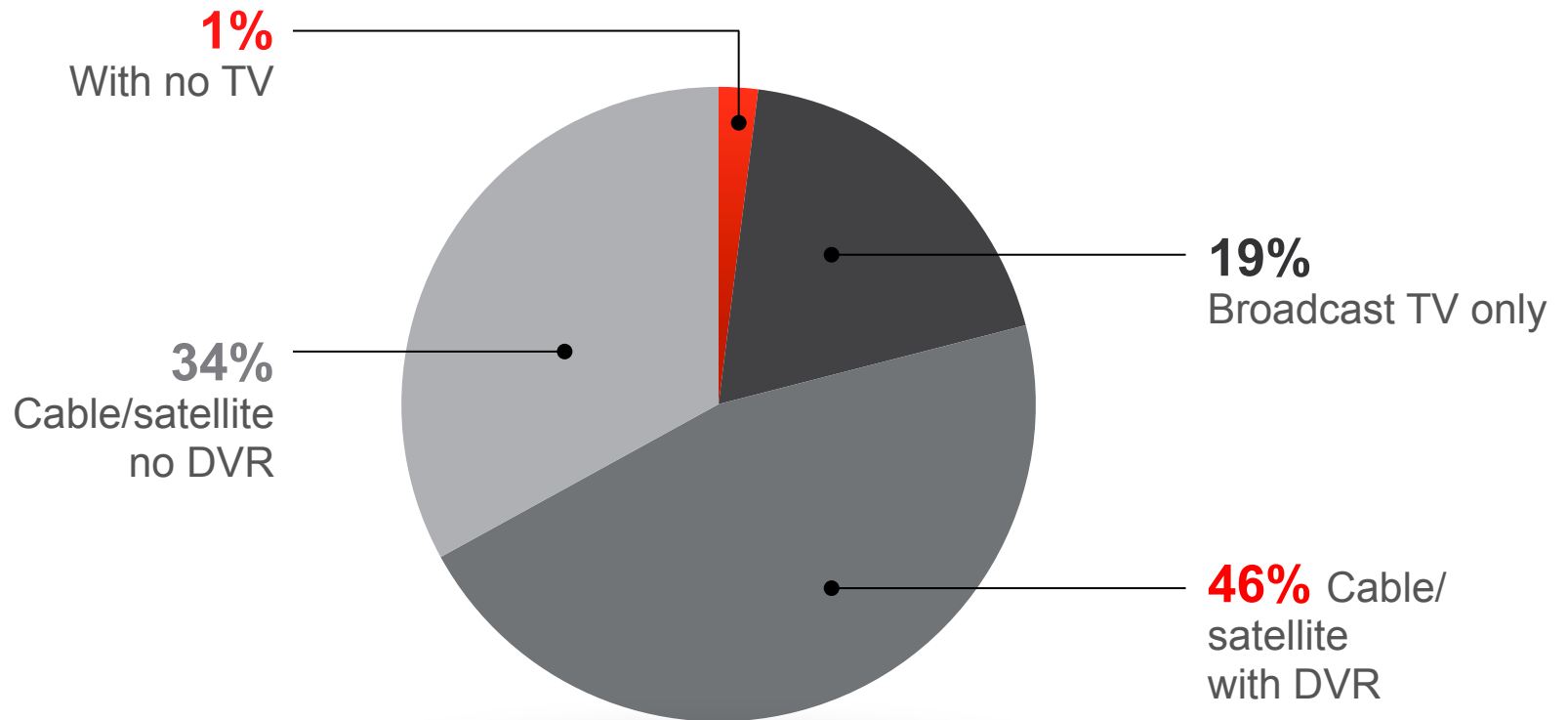
Media On Their Own Time, Own Device

Video
Women 25-49
Changing Media Habits

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

W25-49 are increasingly difficult to reach through broadcast TV

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

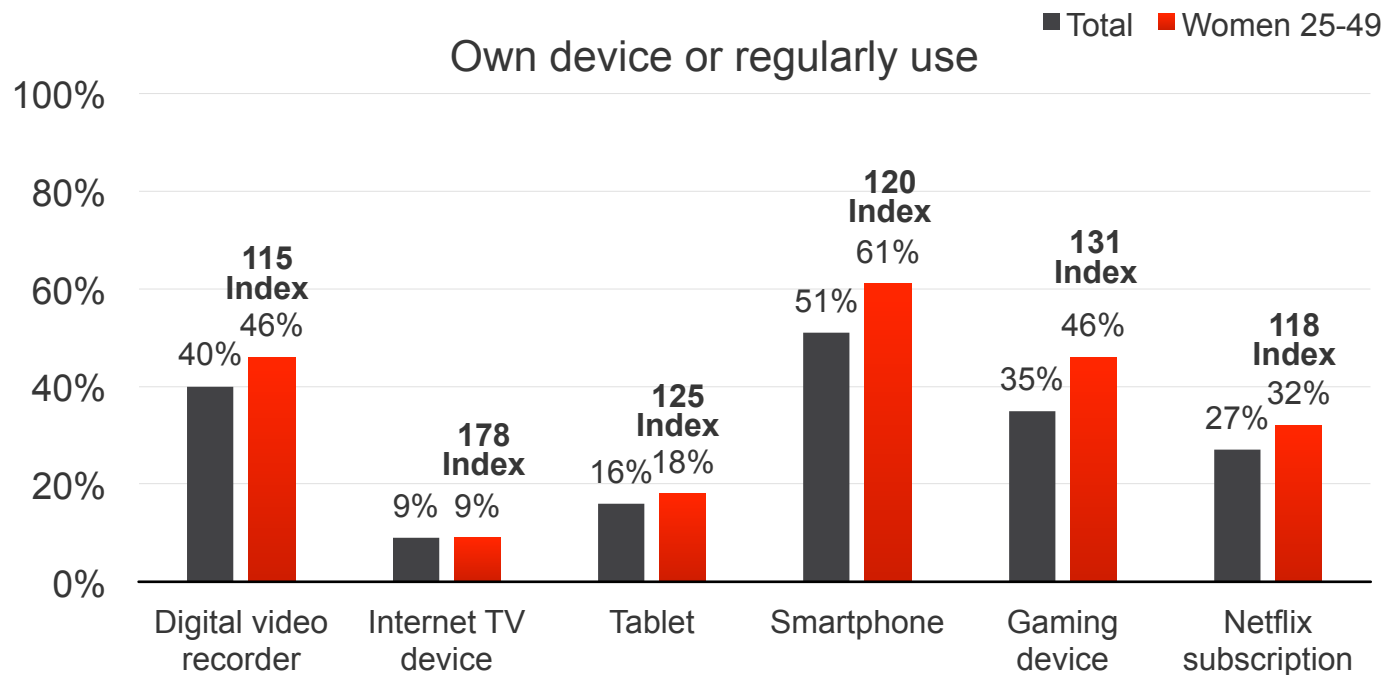


* Only 15% of total adults have broadcast TV only

Base: Have a TV / Q7. What type of TV service do you have? Q3: Devices owned or used regularly.
Source: Google Generation V Survey

W25-49 are early adopters of media technology

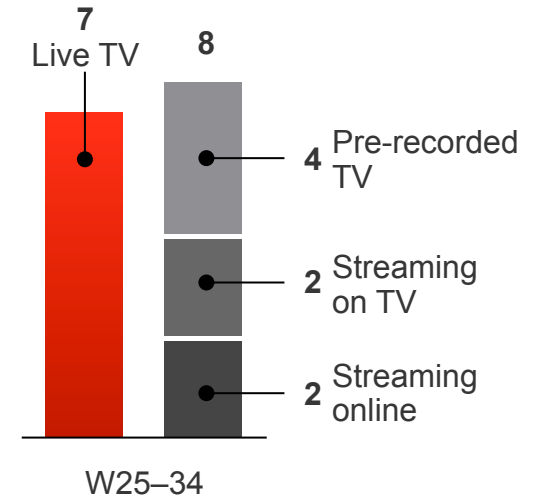
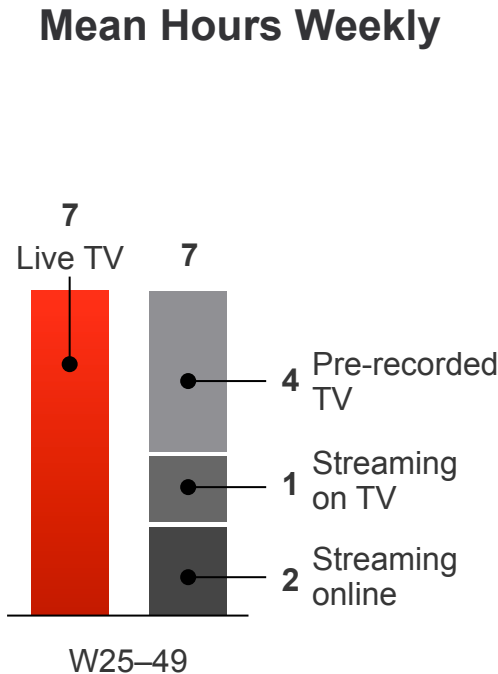
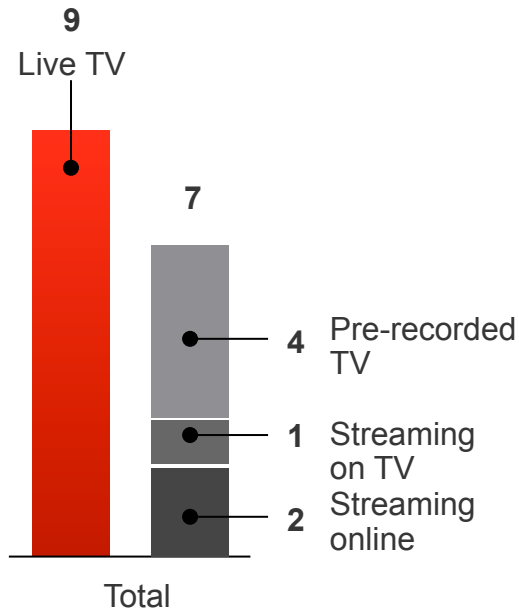
More likely to own time and location shifting devices



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

W25-49 are watching less live TV, more Streaming

Total time Streaming exceeds time with live TV among W25-34



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

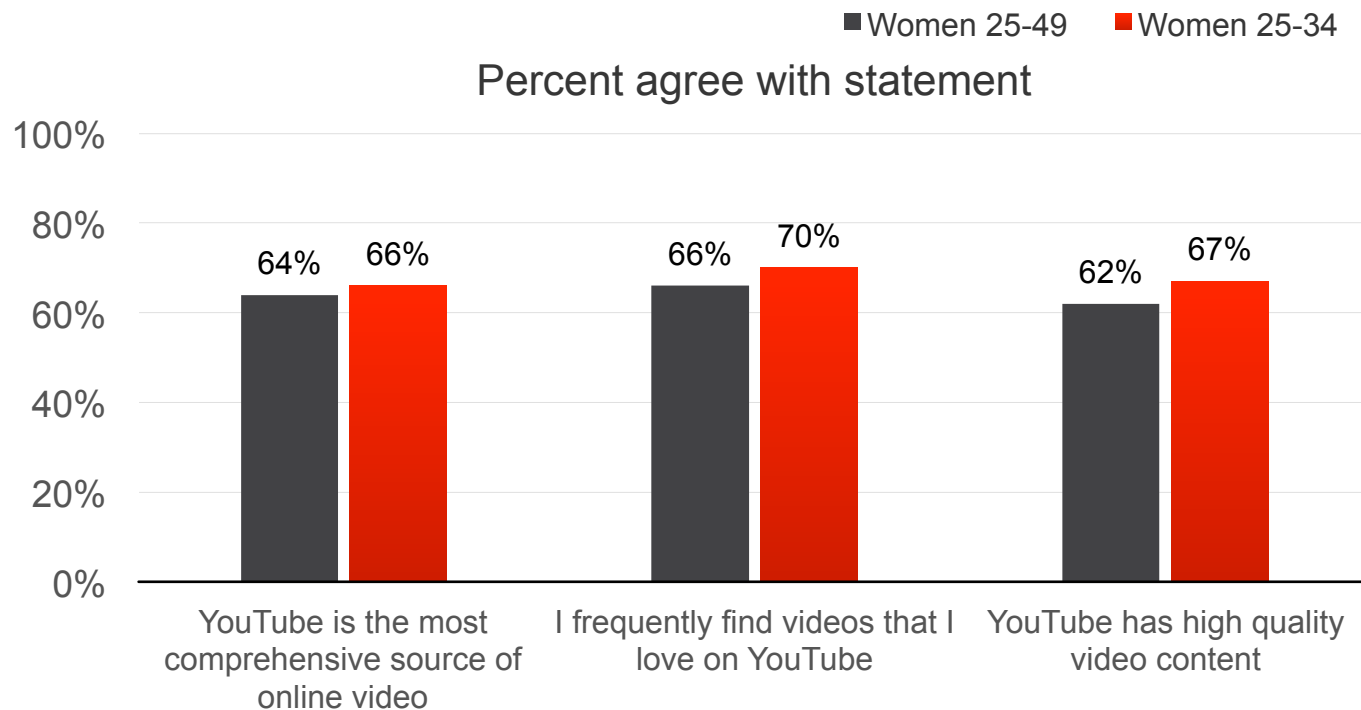
YouTube is **Loved** for Diverse Content

Laugh, learn, listen, discover...

Video
Women 25-49
Watching YouTube Videos

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

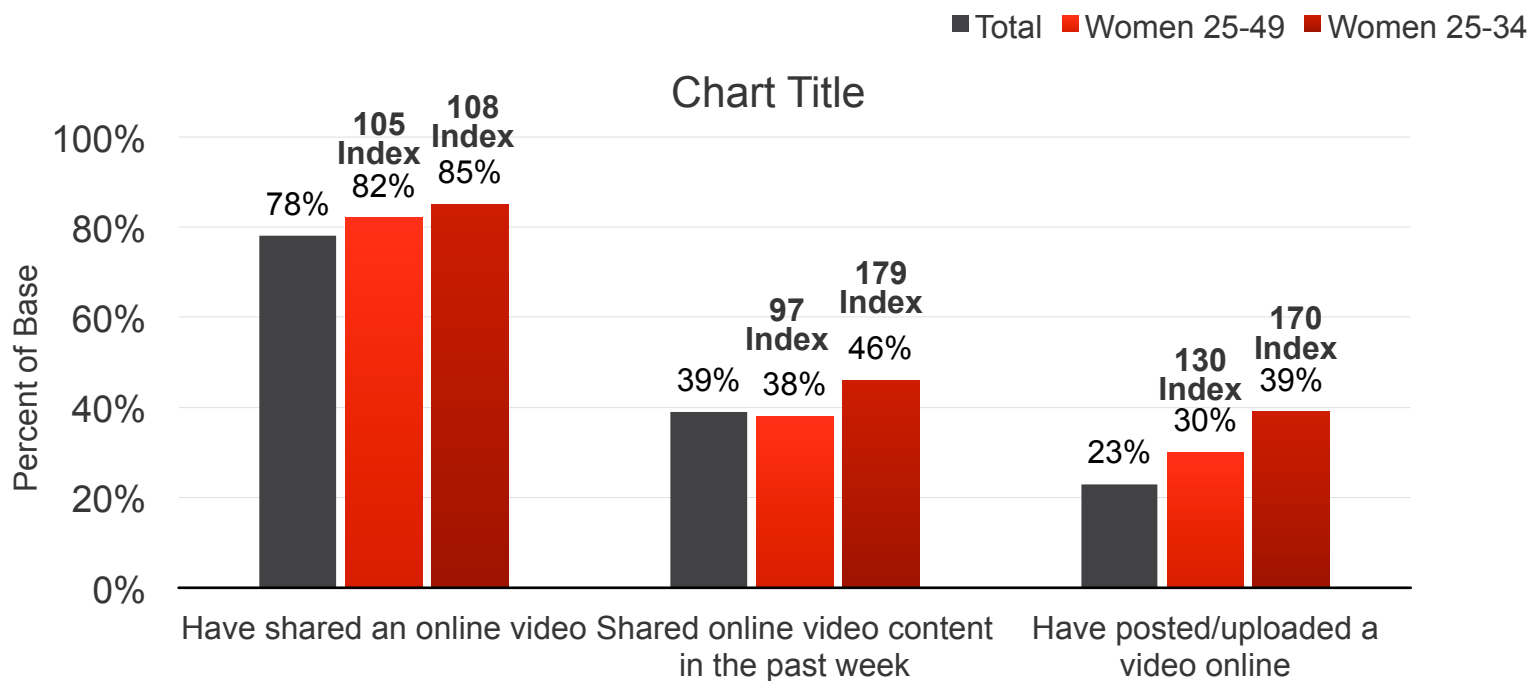
W25-49 loves breadth, depth and quality of YouTube videos



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

1/2 of W25-34 shared an online video in the past week

1 in 3 have posted their own video (any time frame)



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

W25-34 both share and receive videos regularly with their networks

In the past month...

Friends



Parents



Siblings



Colleagues



Children



Received Video

41%

18%

20%

17%

26%

Shared Video

35%

25%

20%

16%

32%

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 Brings Generations Together

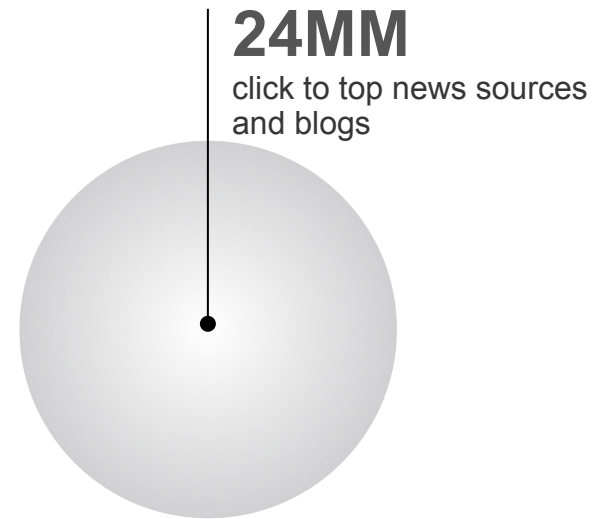
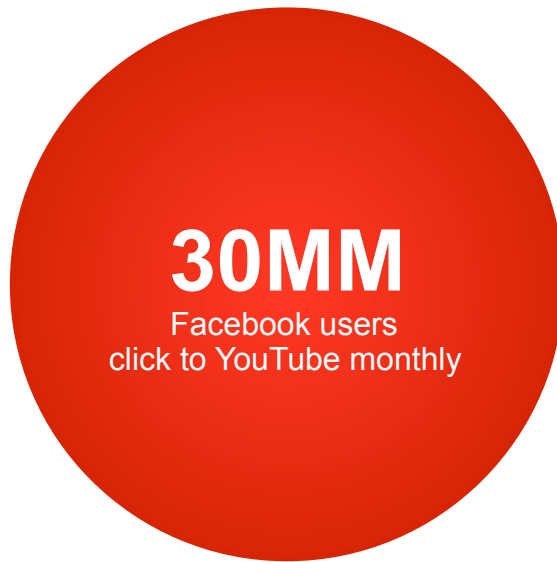
Shared videos as a means to bridge both generation and distance

Video
Women 25-49
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



The Washington Post



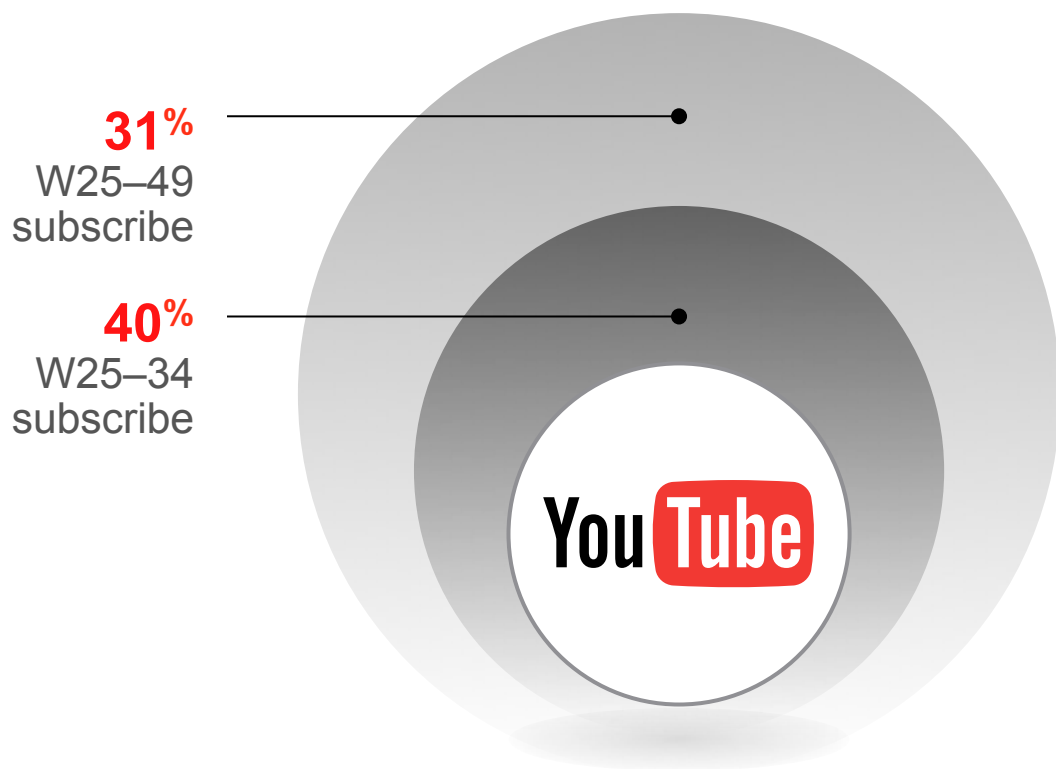
The New York Times
Expect the World®

THE HUFFINGTON POST



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

40% of W25-34 subscribe to specific YouTube channels or content creators



25%

of W25–34 actively seek out videos related to their particular passions or hobbies

Base: YouTube Users / Q27. Do you subscribe to specific YouTube Channels or Video Creators?
Source: Google Generation V Survey

Key Insights – Gen V W25-49

- ▶ W25-49 are the family media managers and 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 help them learn to do anything they want, and provides entertainment for the whole family
- ▶ YouTube is Part of the Social Fabric W25-49 share with their friends, family members and colleagues – they regularly watch videos with their children
- ▶ 2/3 of Gen V W25-49 visit YouTube monthly

Appendix