

## **Cutting the Cord: Where Are All the Generation Y Viewers Going?**

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## **Abstract**

Cutting the Cord: Where Are All the Generation Y Viewers Going?

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The purpose of this study was to better understand Generation Y's consumption of video content, with a focus on alternative viewing devices. Research was conducted into the technological, economic, and social factors that have contributed to Generation Y's shift from a traditional television-viewing paradigm to alternative viewing practices and devices. The study was conducted in 2015, through an Internet survey, and included 199 participants between the ages of 21-35. Results from the research paint a clear picture of the variables that have influenced Generation Y viewing behavior, as well as feature specific data that indicate viewer preference around viewing devices and allegiances to leading content delivery portals.





## CHAPTER 1: INTRODUCTION

The television industry, like many industries of its kind, has grown steadily in viewer consumption over the last several years. In the 1<sup>st</sup> quarter of 2016 Nielsen reported that Americans viewed an average of 4.5 hours of television content a day. Data has also shown, however, that since 2012 the average amount of television watched on traditional television sets has declined by 7.7%. This is significant, as the rate of non-traditional video viewing, viewing through a computer or mobile device, has steadily increased by over 58% in that same time frame. Digital video viewing or OTT (Over the Top) viewing can be defined as the access to and the viewing of any content through an Internet connected device, primarily by computer, tablet or mobile phone. This type of video viewing accounts for almost 2.5 hours per day, on average, and is continuously increasing year over year (Nielsen, 2016). Considering this fact, as well as the significant penetration of new technologies into the market, a deeper look into the future effects of alternative viewing on the industry is warranted.

The definition of television is one that is constantly evolving as new distribution platforms become available. The term, once referring simply to content delivered through an electronic tube in one's living room, now boasts a much wider definition. The development of video streaming technology and advancements in the delivery of video content through the Internet have re-defined the medium known as television. Television has been divided into two separate entities, one physical and the other more theoretical. The television set still remains the main viewing platform for television content, however an alternate use of the term has arisen, as it refers simply to the content that was once seen through an electronic tube, but is now viewed on other devices (Nielsen, 2012). Additionally, while the television set is still the main device used in viewing content, it no longer delivers content solely from a single provider and single device, the cable box. The concept discussed above is termed as "Over-the-Top" viewing. In this content delivery and viewing model, video content is sourced from traditional distribution channels and video content providers, but delivered through Internet connected devices (Nielsen, 2012). In addition to new viewing methods and means of access, our interaction with the content has also changed. Video content has become a shareable commodity across multiple platforms, beginning the conversation over the definition of a "Television Viewer" vs. a "Television Household." It is this sharing, paired with new

methods of content acquisition, that has created a need for revised definitions of television concepts, more fitting solutions for measuring viewership and an advanced model for securing profit from content viewing.

Over-the-Top viewing primarily consists of four categories: computer viewing, mobile phone viewing, tablet viewing, and Internet enabled streaming to a television set (either directly or via a gaming console, surround sound or other equipment). These four viewing options do share a commonality as they all rely on the use of an Internet connection, however they account for vastly different delivery and profit models. They also all rely on three primary factors that have contributed to each of their growth: advancements in distribution and viewing technology, economic conditions, and changes in social norms. Technological advancements in the early 21<sup>st</sup> century have allowed for the proliferation of personal computers and mobile devices, as well as faster Internet connectivity. In 2010, viewing of live streaming video increased by 648% over the previous year and usage of non-live sites such as Netflix or YouTube increased by 68% and 75%, respectively. This is largely due to developments in speed and efficiency that have enabled viewers to have a comparable experience with their computer as they do with their television set (Clancy, 2012).

Up until recently all OTT delivery methods have been grouped together, as the industry attempts to catch up to the speed at which technology, economic conditions, and social norms have been changing the landscape of content viewing. However, as mobile viewing steadily increases its share of the viewing market, understanding its impact will require separating it from its OTT siblings. Mobile viewing requires vastly different business and distribution models, as well as the addition of infrastructure and subscription providers, such as mobile carriers and application development companies, that historically have not been considered part of the television ecosystem.

The largest demographic group participating in Over-the-Top viewing, particularly on mobile devices, are predictably 18 - 34 year olds, commonly referred to as Millennials or Generation Y. The Generation Y demographic was born over an 18-year span, from 1981-1999 and contains approximately 77 million Americans (Bristow, 2011). This group was the first generation to transition through adolescence with readily accessible personal computers, home Internet connections, and Wi-Fi. According to Bristow, “90% of Gen Yers over the age of 18 use the Internet. 75% use social networking ... 83% keep their cell phones nearby, day and night, awake or sleeping. Two-fifths don't even have a landline” (Bristow, 2011).

Generation Y contains a set of viewers that blur the lines between old and new viewing habits, having been raised in an era of appointment television and cable subscriptions, yet they are leading the charge towards a la carte consumption and dynamic pricing models, all through technological adoption and innovation.

Much research has been conducted into the technological adoption trends of Generation Y viewers. Notable research firms publish regularly on the access and frequency of video content viewing. What is missing from these reports, and has not yet been reported with a clear perspective, is what external influences are behind these facts and figures, other than a clear desire for increased volume and higher quality content. Countless articles point to an uptick in consumer viewing on wireless devices and other OTT methods, however few reports share findings beyond quantifying overall usage at a mass level. As mobile viewing increases and trumps other OTT options, it is important for industry leaders to gain insight into what factors direct consumers to make the choices they do and what pressure points influence their decisions.

### **Statement of the Problem**

“Cutting the Cord”, a term used to describe viewer detachment from traditional media distribution methods, is an occurrence that is noticeably becoming more prevalent among young adults in the United States. The Generation Y demographic, defined above, transitioned through adolescence and into adulthood in a technology driven era. They have witnessed the Internet’s rise to prominence and were raised with the ability to harness the medium to their own devices (Kane, 2016). It is a generation that has also seen numerous advances in television viewing technology, e.g. VHS, DVD, DVR, and VOD and been provided with the power of choice in how to participate in video content consumption. This generation, however, has entered adulthood in a difficult economic climate. The job market and other financial trends have caused lower income levels and higher costs of living. Results from the 2010 U.S. census show that the median income for adults 25-34 in the last 10 years has dropped by over \$3,000 [in 2010 dollars] equal to income levels from the mid -1990s (Census, 2010). This coincides with increasing living expenses and transportation costs. Social trends have also forced viewing habits to differ. Watching television no longer fits into an appointment-viewing model for many young adults. This is due, in part, to advances in

technology, but can also be attributed to larger social networks and an increase in social activities that compete with traditional television prime time. The current problem facing industry leaders is simple in explanation, but incredibly difficult to answer. To begin they must gather insight into the following: What technologies are consumers primarily using to access content; When do consumers use each of the technologies they have access to; Why do they prefer different distribution methods over others for viewing video content; What new pricing models are consumers willing to accept based on their usage patterns?

### **Purpose of Study**

The purpose of this study is to understand what factors contribute to the adoption of mobile viewing by the Generation Y demographic, and how these factors may be analyzed to create better distribution and pricing models in the future.

### **Research Questions**

- 1) Where are viewers 20- 35 going to access video content? How often do they use mobile devices over other delivery methods, especially other OTT services?
- 2) What factors are contributing to a transition from viewing via a television to mobile devices? What technologies, economic factors, and social conditions have influenced this change?
- 3) How are distributors working to meet the demands of mobile viewing? What strategies favor the consumer? Which of these strategies are harmful to the distributor/consumer relationship?
- 4) What is the 20-35 demographics' view of current distribution methods? How would they prefer to access television content?

## Significance to the Field

This study will be conducted to benefit a variety of stakeholders that participate in the media and technology industries. As mobile technology plays a larger part in the way Americans access television content, further insight on viewing trends will be needed not only by television producers and traditional distributors, but also by wireless companies and cell phone carriers. The verticals of television and mobility have for many years run in parallel to one another, with a few intersections. The emergence of a high demand for live streaming video content through OTT and mobile methods is quickly changing this relationship and raising the need for more knowledge about how consumer demand impacts enterprise roadmaps.

## Definitions

There are many industry terms that will be used throughout this analysis. The researcher has gathered and determined definitions for these by consulting an array of industry resources. In order to ensure a common understanding of meaning within this research, the terms will be defined as follows:

- **MVPD** – Multi-Channel Video Programming Distributor. A service provider that delivers multiple linear streams of video programming services at a subscription fee (FCC, 2014).
- **OTT or Over the Top Content** – Defined as media content delivered to consumers through an internet connection that is not controlled by a MVPD. In this instance we acknowledge the ever-changing landscape of both infrastructure and content creation, conceding that some OTT content is now produced by MVPDs and also transmitted through their infrastructure. What is important in this definition is the content being consumed and whether a MVPD is receiving direct compensation for its access.
- **Household** – Following the traditional definition, a single residence that consumes content through any method. This includes all individuals who reside in this home, counted as one unit.

- **Generation Y** – Defined as adults born between the early 1980s and 1990s, putting the age range at the time of this research approximately between 25-34.
- **Tablet** – A mobile device that acts as a viewing and communication mechanism. This device may have access to the Internet through wireless or WI-FI services, but is not able to make phone calls.
- **Mobile Phone** – Also known as a “Cell Phone”, a telephone that is not tied to a landline, but instead receives and sends communications through radio waves on a cellular network.
- **Smartphone** – A Mobile Phone with an advanced mobile operating system that allows for the integration of a touch screen and features beyond that of placing phone calls. Often this includes access to the Internet, which uses cell towers and satellite webs for receiving data.
- **Television** – An electronic system of transmitting transient images of fixed or moving objects together with sound over a wire or through space by apparatus that converts light and sound into electrical waves and reconverts them into visible light rays and audible sound (Merriam-Webster, 2016).
- **Channel, Medium, Portal** - The following terms are used interchangeably throughout the research to refer to the avenues by which viewers access and view content.

## **Principle Hypothesis**

The onset of OTT viewing through computers and subsequently mobile devices coined the term “Second Screen” (Vanattenhoven, 2016). It is a term now widely recognized in the industry and that in recent years has become a serious contender for content viewership. However, the industry is quickly seeing a major shift in viewing habits that will usher in the dawn of a new era of media consumption, one in which the traditional “First Screen” (Television) swaps places with its younger sibling “Mobile devices” and becomes forever more the “Second Screen”. This transition will be steady, but swift. Based on current consumption trends and provider adherence, we will see mobile consumption of media challenge traditional viewing within the next decade. Mobile devices will become a consumer’s primary means for accessing video content, as well as serve to replace their cable box as a content distributor to other viewing devices.

“People will only watch TV on a mobile device of last resort. If they’re at a PC, they’ll watch on their PC; if they’re in front of a TV, they’ll watch there. The small screen will only win when the others are

unavailable” (C, 2006). A lot has changed since this statement was made. Since then mobile viewing has increased significantly, showing clearly that either mobile viewing is becoming more accepted or mobile devices are further proliferating the market; This paper serves to provide evidence to suggest both are responsible (C, 2006).

While it is easy to speculate what the future may look like for content viewing on mobile devices, more insight is needed into the factors that are contributing to these trends. Research must be done to guide what systems must be put in place to track these changes more closely and to preemptively meet the demand of future consumers with better business models.

## **Background**

A study into the use of mobile devices for over the top television viewing would be incomplete without a discussion around the technology component involved. While this study will refrain from delving too deeply into specifics around mobile phone development and architecture, it is important to review the evolution of technologies as they pertain to video content viewing at a consumer level. Mobile devices have proliferated the American consumer market for the last 10 - 15 years and the introduction of video focused smartphones in 2007 opened up the OTT market in a myriad of ways. Apple’s iPhones were arguably the first entrants into this space as the first devices designed with widescreen viewing in mind and a keyboard less touch screen face that maximized screen dimensions (Soukup, 2015). What we already know, today, is that smartphones have almost fully proliferated the US market. As of 2015, 64% of all Americans owned a smartphone, including 85% of percent of the Generation Y demographic (Smith, 2015). While this clearly shows a penetration of the technology as a whole, it is less clear what the devices are primarily used for. In relation to this research, there are still unknowns regarding how often these devices are used for viewing video content and in what relation to other viewing devices. As we will discuss, analytical studies have been done attempting to dissect viewership by device, but they supply very little, if any, information on how these devices are used in conjunction with one another and in what frequency. This study will not only work to gain a more comprehensive understanding of what devices consumers are using to access mobile

video content, but how many devices they are using for this purpose, at any given time, and where the transition between devices or use of multiple devices simultaneously takes place.

In the last several years cable providers such as Comcast and Time Warner Cable have seen their subscriber base drop by over a quarter million subscribers annually (Lee, 2014). This figure may seem quite low, but, based on current MSRP for service, accounts for an estimated loss of \$264 million per year for each company. This is small percentage of most MVPDs total net worth, but may be a sign of harder days to come. Their viewers are either going to other providers, finding alternate ways to source the content that these companies provide, or simply cutting television out of their life style altogether. Evidence suggests that demand for content has never been higher, however, supporting the need for more information on the former, rather than the latter (Lee, 2014).

Shifting lifestyle habits and the availability of content on multiple platforms is threatening traditional television viewing habits. Viewers are sharing their time with traditional media and new technologies. The availability of content from numerous outlets has allowed consumers to choose how they view content and disrupted the former ideal of appointment viewing. As Dounia Turrill, SVP of Insights for Nielsen states, “Driven by younger viewers initially but embraced by older viewers increasingly, consumers are device and platform agnostic looking for quality, professionally produced long form programs to connect with at home or on the go.” The Generation Y demographic has become one focused on quality content and is willing to access it by any means possible. However, with a lack of platform loyalty, an ever-growing list of digital distribution methods, and a customer hunger for instant content satisfaction, it is even more pressing for industry players to determine what the contributing factors are that may provide them with an edge (Nielsen, 2014).

Generation Y has entered the job market in a troubling time for the US economy. A 2010 census report detailing the income of Americans 25-34 years of age showed that the mean gross income for this age group fell (in 2010 dollars) from \$39,388 to \$35,082 in a 10-year time frame (2000-2010) - a decrease in income of 11%. In addition, the total population in this age group has grown by less than 1 million individuals within that time, allowing for very little affect in the data due to population change (US Census Bureau, 2016). This is compared with inflation rates and a cost of living in the United States that grew steadily until 2008, however has since stagnated due to a financial meltdown. Using this as a base, one can



begin to understand the financial pressures that face Generation Y. Inherent in financially difficult times is the trend of casting off un-necessary and luxury expenses, cable television being one of them for many individuals. "According to estimates from the NPD Group, this year the average subscription pay-TV [non-broadcast television] customer will pay an astonishing \$123 per month for pay-TV. NPD estimated that same figure was \$86 in 2011, which indicates an increase of 9.4% annually between 2011 and 2015"(Carnetter, 2015). This is further concerning when you take into account that the Consumer Price Index for that same time period only increased annually by 1.6%. Nancy Kho discusses this trend in her research on cord cutting, the decision by consumers to effectively cut ties with their cable providers in the search for less expensive alternatives. The article, *Cord Cutting* cites a PEW "Generations 2010" research study, which attempts to chronicle Generation Y's exodus from traditional television to online viewing. According to Maryann Baldwin, vice president of consulting firm Frank N. Magid Associates, who facilitated the study, "the 25-34 age group is so good at finding deals"; "they excel at finding the least expensive way to get exactly what they want online, when they want it."

Standard economics of the issue have been further complicated by online subscription platforms that provide much of the desired content to viewers at a fraction of the cost of cable. While access to most series are delayed by anywhere from a few minutes to several weeks, these sites have found a large following among the Generation Y demographic that is willing to wait to view the content or finds the delay reasonable in relation to cost benefits. One of the largest of these alternative providers is Netflix, a site that provides consumers with a library of movies and television series for a monthly subscription fee. Reported in a 2011 survey by Michael Grotticelli, users of this service are more than twice as likely to decrease their cable service, as opposed to the previous year (Grotticelli, 2011). In addition, 32% of those surveyed were thinking about canceling their service altogether. Of those 32%, 24% cited economic issues as being the primary reason for the cancelation. Credit Suisse analyst Stefan Anninger has stated that, "The problem is that the longer the economy remains weak, and if over-the-top options improve, the harder it will be to bring these subs back to pay TV."

Cutting the cord for economic reasons and canceling a cable subscription is not a simple transition if a consumer still requires access to television content. Primarily relying on some form of OTT viewing requires Internet connectivity for streaming and downloading of content. In most major markets the leading

provider of Internet service is also the MVPD that provides cable service. For many homes that coaxial or fiber cable cord is the fastest way for consumers to gain access to data. To capitalize on this, MVPD giants, like Comcast, are bundling their cable subscriptions with Internet services so that “in order for you to get content you like, you’re going to be pushed to pay the cable bill, too” (Grotticelli, 2011). They have carefully crafted pricing models to entice customers to remain faithful regardless of viewing style, by linking all outside services to the home.

In addition to bundling of services to maintain current cable subscribers, the industry rolled out a revised model of authenticated distribution called TV Everywhere. This model is designed to make content available online to subscription holders of traditional cable accounts as an incentive for continuing their contracts with MVPDs. “Adopted after lengthy discussions among incumbents, TV Everywhere is designed to crush online competition while being marketed as a consumer- friendly feature” (Ammori, 2010). First coined in 2009 by Time Warner executive Jeff Bewkes, the service uses unique credentials tied to consumer cable accounts that accesses content that they could receive through their televisions, in addition to a library of past series and some specialty programming. Access to this content, however, is not through properties necessarily owned by the cable provider, but through third party distributors (i.e. Hulu and YouTube) and individual network owned portals (Ammori, 2010). This strategy was developed as a means to an end; a safe avenue for cable providers to allow for customer access to content through the device of their choosing, while maintaining valuable revenue streams within the dual-revenue model of subscriptions and advertisements. Consumers have taken to this new service, seeing it as a way to create their own a la carte programming model and continue their avoidance of appointment viewing. A 2014 study by Adobe Digital Index, the marketing and research arm of Adobe, found that, “TV Everywhere — a term for authenticated viewing of broadcast shows from channels you subscribe to on your cable or satellite network — is approaching mainstream use and is growing much faster than other online video sources like YouTube, Hulu or Daily Motion” (Adobe, 2014). The study goes on to share that TV everywhere is steadily gaining access to a majority of consumer content destinations. “TV Everywhere apps include the very popular HBO Go, standalone channel apps like Watch ESPN, Cartoon Network, CNBC, Syfy and similar offerings. Cable and satellite providers also offer their own branded apps, like Comcast’s Xfinity TV Go, Time Warner Cable’s TWC TV and Dish Anywhere.” Most of these apps were announced within

the last five years, but have been steadily getting the rights to stream more content and have seen a heavy marketing push over the past several years (Adobe, 2014). Although many consumers would prefer to sever ties with cable providers they are taking the path of least resistance and falling in line with new offerings that allow them to access content at their whims and on their chosen devices. TV Everywhere has, for a time, satiated consumers with enough content and freedom to keep them happy, while holding them within the service contracts that they have constantly fought against. It also supports the idea that with the rise in OTT and mobile viewing, viewers will find ways to stay with their traditional viewing providers, but find more technologically savvy and convenient ways to view the same content, rather than search for it on 3rd party channels.

Enter the smartphone and wireless tablet. Mobile devices have fully penetrated the US market in the last 10 - 15 years. As of 2015, 91% of all U.S adults own a cellular phone, and 64% own a smartphone, a number that has risen by 35% since 2011 (Smith, 2015). The Generation Y demographic is at the forefront of this trend; in 2015 85% of adults 18-29 in the U.S. owned smartphones, accompanied by 74% of those in the 30-49 age range. This trend also spans all genders and all major ethnic groups. Men and women are separated by 4% (at 61% and 57% respectively); and White, Hispanic and Black adoption are all within 8% of each other, with the white demographic coming in at the lowest 53% (Smith, 2015). In addition to social pressures and business requirements, this trend is largely due to decreases in carrier costs and mobile device ownership built into monthly subscription fees, offering a nearly non-existent barrier to entry. The cost of mobile phones themselves, however, is not the only economic driver for video consumption via mobile device. The other supporting factor for this adoption is the cost and ability to access data. Content delivery systems for mobile devices require one of three means for delivery: direct connection via computer, broadband data streaming (often known as 3G, 4G or LTE) or Wi-Fi connection.

The proliferation of these devices has motivated the cellular and broadband industries to commit large resources to a web of support for consumer's ever-growing data needs. This web of support and connectivity allows for a reliable stream of data and has opened possibilities far beyond phone calls and text messaging. Smartphones have the ability to now stream content reliably and inexpensively from a variety of sources using the above channels of Wi-Fi and broadband. "When it comes to online video, people may not want to cut the cord. Instead, they want to take the cord with them. People are streaming

broadcast television on their smartphones in record numbers, according to Adobe's "State-of-the-Industry Report on Digital Video Viewing" (Adobe, 2014). In fact mobile video viewing went up 57 percent over the same time last year [2013], and overall online video was up 43 percent, representing more than 35 billion viewings (Adobe, 2014).

## CHAPTER 2: REVIEW OF LITERATURE

The Generation Y demographic has grown up in the age of content distribution through Internet and mobile platforms. This generation is the first to be able to access programming content on platforms and devices outside of traditional television means. Due to this, trends distinctive to this demographic have arisen that challenge the current business models of television providers. In addition, platforms that break away from a traditional viewing model have gathered prominence far before the industry was able to adequately prepare for them. The result has been a concentrated effort by media companies to catch up to their viewers, creating new business models as quickly as they are able to organize and build the infrastructure for them. These trends have created a need for information surrounding the viewing habits of Generation Y; information that will allow media companies to better forecast where their viewers will be headed in their quest to access programming in the most convenient and cost-efficient way they can.

The literature review presents the three main areas that are driving the push by Generation Y consumers to mobile platforms and convey the work that has already been done in an effort to understand these trends. These three areas of impact are technology, economics, and social norms and conditions. Each of these has played a crucial role in viewing habits and consumption. From a technology standpoint, we will delve into technology's ever-increasing role in consumer's decisions to seek content on alternative devices to their television sets. We will reference studies that have shown a change in viewing trends due to advances in access to devices and the impact of Internet enabled streaming content. Regarding the economics surrounding viewing choice, both at a personal level for consumers and at a preference level, work will be shown that conveys the need for cheaper alternatives in troubled economic times, and also define a consumer ideology shift that ties the cost of programming to a disdain for station bundling. Finally, we will focus on how social conditions and newly acquired norms within this demographic have affected viewing habits, including the Generation's desire for "a la carte" programming and the demise of appointment viewing.

## Technology

Technological advancement and the proliferation of new technologies into the market is one of the three contributing factors that have led to the adoption of mobile viewing. Arguably this factor is the most important of the three that we will look at in this study. As we will see from past research, technological advancements have consistently supported both customer demand and engagement within the Generation Y demographic. The push and pull nature of supply and demand driven economics and consumer adoption has largely been ignored in this space, historically. Customers of past generations have always been pushed towards predefined technology solutions for viewing content. Recent advancements, however, have allowed for viewing devices, such as a television or computer, to become “connected devices”, thus enabling them to speak to one another over the Internet. The evolution of connectivity has allowed for individual portals of viewing to communicate and work together, shifting the control of which viewing mechanism to use from the provider to the consumer. What is less predictable and requires further investigation is how consumers are then taking these advancements in technology and using them to access distribution portals. This section will attempt to gather research around consumption of media through new technology and the various ways in which viewers access content. It will also discuss where there is a lack of knowledge in the effects of these additional technologies and where it is unclear whether the customer or industry is driving innovation.

As we have discussed earlier in the research, the smartphone and its adoption play a crucial role in our investigation into alternative viewing methods. It is clear the technology is a disruptor in the television ecosystem, however it is unclear to what extent. Generation Y’s access to new technology and its integration into their daily lives is often thought to be a contributing factor to the move away from traditional viewing models. A 2015 study by Aaron Smith of the Pew Research Center provides some insight into this adoption, looking to document the proliferation of smartphones and determine their use. The study leveraged three data sources to gather its findings; the first from a 2014 U.S. telephone survey of 2,000 random adults on smartphone adoption, the second from a 2014 American Trends Panel of 3,181 respondents on smartphone use, and the third from an additional 2014 American Trends Panel of 1,635 respondents that focused on the smartphone experience. The report used the above survey data to

understand several topics around smartphone adoption and usage, which it broke down into three sections.

The first of these sections surrounded ownership of smartphones and the owner's reliance on them for access to broadband service. The second topic covered by this research surrounded the use of smartphones by their owners, covering the gamut of possible use cases from accessing health data to online banking to submitting job applications to media consumption. The last piece covered in this report focused on a user's emotional connection to his/her smartphone and its role within their daily lives. The study concludes with several important findings. The first of these is that 10% of adult smartphone owners rely on their phones as their sole access to broadband while at home and 15% rely on their smartphones for online access regardless of location. Furthermore, the report states that 13% of Americans with an annual household income of less than \$30,00 fall into the above need, while only 1% of households earning more than \$75,000 are in a similar state. This displays a clear tie between user adoption and economic factors. The second finding of the report focused on the emotional connection that owners of smartphones have with their devices. It noted that younger owners tend to have a wider range of emotions associated with their smartphones and are more likely to use them to avoid boredom and ignore people. The third finding was that young adults are more likely to use their phone for media consumption than their older peers, noting that "Three-quarters of younger smartphone owners (75%) indicated using their phone to watch videos at least once over the study period, compared with 31% of those 50 and older (a difference of 44 percentage points)."

While this study provides a high level of detail regarding the use of smartphones within the Generation Y demographic, as well as specifics around the economic and social factors that influence that use, it fails to dive deeper to discover why those feelings exist or what other economic factors play a part. Additional research would provide qualitative reasoning to support these trends, as well as document more granularly what content is being accessed by this demographic, and from where on their devices.

The smartphone, while a focus of this study, is not the only device that has taken away viewing market share from traditional viewing. As Banerjee, Alleman and Rappoport outline in their research, *Video-Viewing Behavior in the Era of Connected Devices*, there are an array of technologies that play an integral part in the move to OTT viewing. Additionally, there are factors far and above the simple availability of new technologies that influence viewing behavior that must be accounted for. In this study,

the researchers identified 3 factors that they felt primarily contributed to a move by consumers to OTT viewing. These factors were the adoption of multi-function and connected devices (i.e. Smartphones, computers, gaming consoles, etc.); demographic driven preferences and the rise of alternative OTT content providers, such as Netflix, Hulu, and YouTube.

In identifying these three factors, the study sought to gauge the influence of each on a household's choice to be part of one of three defined segments: Non-Pay TV (primarily OTT viewing), Cord Coupler (sharing use of traditional and OTT devices equally), or Cord Loyalist (traditional television viewers who do not use OTT devices for content). As a basis for this research, the group used longitudinal survey data from an April 2011 to December 2011 Centris Survey, focusing on television consumption. The survey had a large sample set of 7,655 households, grouping the information by fiscal quarter within the study's timeframe. Among these households, the average age of survey respondents was approximately 49, and a majority of participants were Caucasian, 87%. The group was also primarily female, 70%, and the average annual income of responding households was approximately \$59,400 (Banerjee, Alleman, & Rappoport, 2013).

Using the above study parameters, the researchers sought to answer two questions around three main focal points: "Do households transition among the three OTT segments [identified above] over time?" and "Do households adding OTT to their viewing options also keep their pay TV service or drop it?" By asking these questions further insight could be gathered, not only around consumption trends, but also behavior and consumer churn. To best analyze this data the researchers created a framework for analysis, which included several mathematical equations. These equations served to break out findings in three categories: distribution of viewers by OTT segment (as a percentage), alignment of key demographics to OTT segments, and the dominant demographic group in each segment.

The findings of this research did in fact shed some significant light on the OTT segments that are present in the marketplace, as well as an understanding of the drivers within demographics. At the time of this research, 8% of respondents were part of the Non-Pay TV segment, those that had fully cut the cord from traditional television, or never connected to begin with (Banerjee, Alleman, & Rappoport, 2013). Using an algorithm, which they created, the researchers sought to determine what the probability was that a viewer would fall within this grouping.



They found that the group with the largest probability of falling into the Non-Pay TV segment was Asian American males, ages 18-34, with low income (\$0 - \$20,000 per year) and owning 2 viewing devices. They were followed by Hispanic females, ages 35-39, with upper-middle class income (\$50,000-\$100,000 per year) owning 3 viewing devices. The second largest segment, 39% of their sample set, were Cord Couplers, those who used both traditional and non-traditional viewing methods. Of them, the demographic with the largest probability was Caucasian males, ages 18-34, with a yearly income of over \$100,000 and an average of 6 devices. This group was followed by a high probability of Asian American females, ages 40-54, with an upper-middle class income of \$50,000 to \$100,000 and 4 devices. The last and largest segment, 53%, were Cord Loyalists or traditional television viewers. Within this segment the most likely demographic were Black females, age 55+ with a lower-middle class income of \$35,000 to \$50,000, owning 1 device [presumably their television set]. They were followed closely by Hispanic males, ages 35-39 with an income of over \$100,000 who own 3 devices, on average.

After determining the probability of segment alignment, the researchers then determined the longevity of being part of one these groups, in order to see change over time. They found that while “movement into the pure OTT-only Non-Pay TV segment was still relatively a trickle in 2011, there was a comparatively more impressive movement from the pure non-OTT Cord Loyalists to the hybrid status represented by Cord Couplers.” Approximately three quarters of households in each of the three segments stayed in their segment between the beginning and end of 2011. Of those that did move, those that moved out of the Cord Couplers segment were 7 times more likely to stay with traditional TV and drop OTT methods, than to only use OTT methods. They also found a nearly “dead” movement to Non-Pay TV; indicating that OTT use and full cord cutting did not increase in a significant way over time.

Several main conclusions came out of this research around OTT viewing behaviors and demographic segments. It is clear that key demographic characteristics directly influence decisions around which devices are used for viewing and how many are used. As the researchers discuss, the highest level of device ownership lies with those that are bridging the gap between cord-cutting and cord loyalty. This group, Cord Couplers, reports a sizeable income that provides the flexible spending for multiple experimental devices, and also affords them the luxury of avoiding a concrete decision around how they would like to view their content. Device ownership is another aspect of viewing that the research touches

upon, highlighting that it is a complex issue which needs further review. The study indicates that regardless of a device's main function, if its secondary function is to provide streaming content it may still be used primarily for that purpose (Banerjee, Alleman, & Rappoport, 2013). This is the case with owners of gaming consoles, which were found to more likely trend towards OTT viewing than owners of any other alternative viewing devices. Regarding the third factor noted by the researchers, the emergence of OTT content providers and their effects on use, the researchers found that, "although a variety of streaming/downloading services (subscription-based or free) have emerged to meet OTT demand, their impact on decisions to migrate between the Cord Couplers and Non-Pay TV segments [both of which have OTT use] is inconclusive. That is probably because households in both segments make use of the popular paid and free streaming services, leaving little incentive for households in one segment to move to the other purely to obtain streamed video content." This finding is an important factor to note as we continue our research into OTT content services and their impact on technologies chosen for viewing.

Banerjee, Alleman and Rappoport's research sets a solid foundation for looking at the ways that our demographic and economic realities impact on our device ownership and viewing habits. The largest gap, however, in their research is with their choice of a data set. The demographic set that was used was weighted in several instances and raises questions about how accurately we can apply it to research around Generation Y. To begin, their population was primarily female (70%) and Caucasian (87%), which only provides clear insight into those groups preferences and also impacts the ability to apply the outcomes of their analysis to the population as a whole. This is especially important to consider when looking at their initial research around the probabilities of certain racial, gender, and economic groups to fall within one of their three viewing segments. The average age of participants, 49, was another concern, as it limits our visibility into the trends of younger generations with higher levels of disposable income and greater familiarity with advancements in technological devices. The final gap, within the data used, was the average income of participants, \$59,400. When comparing this to the national average at the time of the survey, \$50,094, (US Census Bureau, 2011) and the national average in 2015, \$56,516 (Luhby, 2016), we can see that there is a significant difference from the data set. A few thousand dollars annually may seem small in some contexts, however considering the economic factors which influence discretionary spending decisions for devices and content subscription services, these small differences may hold importance.

## Economics

Economics is the second focal point of this research and plays a large role in consumer spending and lifestyle choices. This is especially important within the Generation Y demographic, as young professionals attempt to include major life events, leisure, savings and necessary life expenses into their budgets. While economic conditions have improved since this generation first entered the work place, decisions on where to spend on non-essential services is still a priority. Entertainment, while more and more engrained into everyday life, still falls within the space of luxury services and can be turned on and off as financial situations change. Mobile viewing, however, has complicated this trend, as smartphones have become less of a luxury item and are considered not only a necessity, but also an extension of oneself. To further complicate the issue, data plans that facilitate the delivery of video content are shared with “necessary” mobile functions, tying the costs of viewing content into other living expenses. This section will share findings from several researchers on how media pricing has conformed to fit the needs of the Generation Y demographic and also how the demographic feels about spending on entertainment.

Due to a recession, followed closely by dismal economic prospects, Generation Y has sought to cut extraneous cost. This has led to a focus on what they actually consume versus what they are paying for the access to consume. These two factors have not aligned for some time, as the amount of content available outweighs one’s ability to digest it. However, questions still remain around where the scale tips when it comes to cost over content, and whether cost is the driving factor in decision-making. A study, “Netflix Users More Likely to Cut the Pay-TV Cord”, performed by the Diffusion Group (TDG), a media research firm based in Dallas, sought to find answers to this question. The study focused primarily on adult Netflix users and their inclination to cancel traditional viewing providers due to “a need to save money”. Performed over two years, the study surveyed 2,000 adults with cable television service and access to Netflix, asking them to indicate whether they had or were planning to downgrade their cable television service due to other available options or due to finances. In the first year of the survey, researchers found that 16% of individuals were looking to downgrade their traditional services, followed by 32% the following year. Of those willing to downgrade, the survey found that 34% said it was due to the growth in online video options, and not to finances. The survey also shared research that 61% of Netflix users cited

access as a primary reason for canceling their traditional cable service, while only 24% were motivated by economic conditions (Grotticelli, 2011). While this research is significant and provides important information into the trends of the viewing population, it fails to address several important variables. Primarily the study does not indicate the sample set used to gather this information. There is no indication if the demographic was local to Dallas, where the research firm is located, and additionally provides no indication of the socio-economic status or financial liquidity of its participants. These factors are necessary to gather actionable insights. It is clear that the researcher believes factors other than economic incentives are at play within the decision making process, however there is still much research needed to verify this. Additionally, the variable of what the content was and the means for accessing online content were not discussed, which may have played a factor into the cord-cutting trend that was witnessed. These variables have been considered and accounted for in the research below.

Grotticelli is not the only individual who has attempted to determine the economic influences on the cord-cutting behavior of the Generation Y demographic. Researchers Dmitriy Chulkov and Dmitri Nizovtsev attempted to approach this issue, as well, from a slightly different perspective. In their paper “Bundling, Cord-cutting and the Death of TV as We Know It” the two seek to look at industry trends in television pricing in relation to consumer response. This research takes an analytical approach to economic trends based on the successful implementation of bundling and a-la-carte programming models, models employed by MVPDs to combat attrition from OTT inclined viewers (Chulkov & Nizovtsev, 2015).

To gather their data the two combined the research of Forrester and the FCC. They took this aggregated data and leveraged it to better understand which consumers were most impacted by pricing trends. In their research the average cost of a monthly expanded basic cable package rose from \$27.88 to \$64.41 between 1998 and 2013. Additionally, separate findings, attributed to the NPD Group, estimated that the average monthly cable TV bill rose from \$40 to \$86 between 2001 and 2011 (Chulkov & Nizovtsev, 2015). These data points show a clear increase in the cost to consumer of television programming at a rate of 131% and 115% respectively. After determining these growth patterns, the researchers then compared these increases to the CPI, consumer price index, over the same period of 15 years. During this period the U.S. CPI also grew, but at a considerably lower rate of 43% (\$27.88 to \$40) (Chulkov & Nizovtsev, 2015). These figures point to a divergent increase in cost for subscription

television, compared to the cost of living. Supporting the concern around these increases are statistics the researchers found relating to consumers' use and viewing patterns. In the time period of 2008 to 2013 they gathered the average number of channels viewed per household related to the increase in channel offerings by subscription providers. During that time they found that the increase in channels viewed by a typical consumer grew by only 0.2 channels, from 17.3 to 17.5. However, during that same time period the channel offerings from subscription providers grew from 129.3 to 189.1, an increase of almost 60 channels. This research indicates a clear disconnect between consumer needs and industry products. While consumers, within this research, remained consistent in their consumption of traditional subscriptions, the industry increased its pricing and its offerings by a large quantity (Chulkov & Nizovtsev, 2015).

The last subject these researchers addressed was viewing behavior by age, in an attempt to see who would be most impacted by the changing pricing models, outlined above. Their data was collected in 2013 and split viewers into two age groups, 18-34 and 35-58. These viewers were then assessed on their preferred choice of viewing device and viewing style. The research found that 50% of 35-58 year olds watch TV live on their television sets, compared to 40% of 18-34 year olds. When streaming live from a free OTT video service only 32% of 35-58 year olds participated, while 40% of 18-35 year olds did. For paid live streaming OTT services only 30% of 35-58 year olds participated, with 40% of their 18-35 year old counterparts participating. The data shows a clear preference by the younger generation to seek content from OTT services and preference non-traditional viewing. Paired with the economic data above, indicating increasing prices for traditional subscription television, this research further supports the findings that younger and lower income demographics are trending towards OTT viewing (Chulkov & Nizovtsev, 2015).

The research made an attempt to correlate several data points in order to gather industry insights, but was limited in several ways. The researchers lacked deeper insight into the usage trends and financial status of their subjects. Additionally they could have done more detailed research and analysis around the data sets they were focused on. As well as reporting the device viewing preferences of demographic age groups, the researchers needed to more clearly define what devices these groups were using, if they were not viewing through a television set, and what costs those choices presented to the viewers. This datum is necessary in order to gather a clearer picture of the many facets of the buying decision, especially for those within the Generation Y demographic.

We have seen through several studies that the Generation Y demographic is more likely to lean towards cost effective viewing, where available, due to increases in pricing models and concerns over economic stability. To accommodate this OTT providers have increased their original programming models and opened up new avenues for cost effective access. What is still unknown is what impact these short-term concerns and their short-term solutions will have on the future of the industry. If traditional television continues to lose viewers to OTT during their younger, economically leaner years, will they ever get them back? Further research will need to be done on whether Generation Y will become accustomed to receiving the programming they need for an affordable price and less likely to revert back to traditional subscription models as their income and financial security grows.

### **Social Norms and Conditions**

Television viewer's relationship to media content is intricate and diverse. This relationship has only grown more complicated as technology has allowed for viewers to control their viewing individually and mold it to their personal schedules. While there remain some instances where "live" viewing may be necessary for single events or spectacles, the idea of appointment viewing is going the way of the VHS and has faded into the history of the medium. As more distractions pull customers out of their living rooms and take up their after work and weekend hours, viewers are finding the convenience of TV Everywhere and on-the-go viewing as a means to stay connected with their favorite content, without slowing down their pace. For reasons stated previously, the Generation Y demographic is adopting many of these new behaviors and significant research has been done into how this has affected their social viewing behaviors. In this section we will look into what data has been collected in past research around the demographics' habits and where there is a lack of knowledge in the drivers behind them.

Countless studies have focused on socioeconomic viewing, with an attempt to understand why members of specific demographics watch one type of content over the other. These studies focus on genre, time-period, racial demographics, and even social class. However, less research has been done into the field of television viewing and its relationship with social interaction, or the conversations and relationship

building that occurs as part of the viewing process. Understanding these factors opens up new insight into the more intangible factors that are less clear to programmers and distributors.

In their study “Social TV: Designing for Distributed, Sociable Television Viewing” in the *Journal of Human-Computer Interaction* researchers concluded that television value to the consumer is often measured in level of social interaction it generates (Ducheneaut, Moore, Oehlberg, Thornton, Nickell, 2008). Often this interaction results in two forms of sociability, either direct (which occurs during watching) or indirect (which occurs post viewing). The researchers point out that while watching TV provides inherent reasons to converse, “There is little research available on the exact practices surrounding sociable television viewing.” The researchers believe that most research on the social behaviors of television viewers have focused on how their “sociodemographic” affects their choice of program and not why they watch television altogether, or behave socially when they do. This study sought to understand if a “better knowledge of joint viewing practices could help develop new technology to better support television mediated sociability.”

The study took place in a research laboratory and was comprised of two sessions. In both of these sessions there was a period of viewing and socialization where participants were monitored, as well as given a questionnaire and an exit interview. The participants were a sample of individuals, ages 20-50 years old, and gender was comprised of 70% male and 30% female subjects. There was no indication of the racial makeup of the study (Ducheneaut, Moore, Oehlberg, Thornton, Nickell, 2008).

The first session involved 3 groups, comprised of 5-8 individuals, who were asked to watch 2 hours of either sports or documentary content together, in a “viewing party” atmosphere. The second session involved 6 groups made up of 2-6 participants. In these sessions, participants were also asked to watch 2 hours of content, however they were provided an audio connection with a second room, rather than a physical one. This connection allowed participants to communicate with another group and attempted to simulate a distributed viewing model.

The researchers analyzed their data by viewing participant behaviors in video recordings of the sessions and through review of questionnaires and exit interviews. Their results were varied, but did provide insight into reasoning behind social viewing. Some of their key findings were that viewers make their decision on what to watch based on what will gather others to their home for social interaction.

Additionally, certain types of content are more likely viewed in group settings, e.g. sporting events or reality television. These types of content either have brakes in entertainment where conversation can naturally take place, or provide enough emotional fodder for conversation, as in the case of reality TV, that participants are inclined to comment even if it inhibits the viewing experience.

From a social interaction viewpoint, an interesting finding from the study revealed that although the two scenarios they constructed provided different forums for communication during viewing, both followed a similar structure in the nature of participants' social interactions. The researchers noted that while in neither case were social norms or rules discussed, the interactions seemed to follow a "set of ingrained cultural practices dictating proper behavior". The researchers continued to analyze the viewing patterns of their subjects down to what was said during the individual lines of dialogue in the content and the specific actions of participants that took place in content breaks.

The research resulted in a clear understanding of how viewers interact socially during content viewing. Researchers were able to type behaviors into 5 broad types of exchanges and were then able to determine which interactions affected the viewing experience positively or negatively for the group as a whole. They also noted that location of the participants was not a factor, determining that communication, whether in person or over an audio connection resulted in similar social interaction. These findings support their conclusion that "interactions between television viewers are tightly interwoven with the structure of the show they are watching" and thus social television viewing is more a symptom of the content and less of the specific medium with which they view it or the time it is viewed. This leads to a larger conversation around social television and where it fits within daily lives of viewers (Ducheneaut, Moore, Oehlberg, Thornton, Nickell, 2008).

The study concludes by proposing technology solutions that would bring social TV viewing into viewer's homes and provide more enriching experiences, while minimizing disruptions that affect the program's flow. This, the researchers argue, would change the way viewers communicate and allow for conversations around media that they do not currently have. While there is valuable insight in this study, there are several factors that it does not address. The first of these, as researcher points out, is a focus solely on pre-assigned groups or "viewing parties" and a lack of insight into "everyday viewing" e.g. married couples, families, etc. This leaves out a large piece of understanding around social viewing. Furthermore,



as the research took place in a laboratory the researchers were only able to gather behavioral information outside of participants' natural settings. Using this tactic they also focused solely on the behavioral component of viewing in a confined period and did not gather any data on the frequency of viewing in these "viewing parties" over other social viewing or what other social viewing habits existed. These understandings are a key piece of insight that must be gathered to fully understand television's relationship to social behaviors and their symbiotic relationship (Ducheneaut, Moore, Oehlberg, Thornton, Nickell, 2008).

In addition to how Generation Y socializes viewing of television content and discusses it with their contemporaries and families, we must also understand how it fits within their everyday lives. As we have discussed earlier in the research, advancements in technology have allowed for viewers to delay the viewing of aired content to fit their schedules and moment by moment desires. The following research investigated how the invention of the DVR and the concept of appointment viewing have been normalized by the members of the Generation Y demographic.

The purpose of the study, "An Investigation Into Alternative Television Viewership Habits of College Students" (Damratoski, Field, Mizell, and Budden, 2011) was to understand how the use of digital video recorders (DVRs) and the Internet are affecting the viewership statistics collected by leading industry analysts. Marketing has become more multifaceted as consumers have more ways to view and also avoid advertising. In understanding how and when viewing takes place, industry analysts can then determine how viewing trends have become part of Generation Y's everyday life and align marketing and advertising efforts to match.

The study took place on a college campus, Southern Louisiana University, and included 228 students, ages 18-23. Invitations to participate were shared with the student body at random, via email and responses were kept anonymous. The sample set was comprised of 55% female and 45% males, with 84% indicating they were undergraduate students. To gather pertinent data, a questionnaire was developed and pretested prior to its final use. Questionnaires were distributed in March 2010 via direct distribution to students in the classes of cooperative professors and through the campus email system.

As with many studies, this research sought to accomplish six distinct objectives, which would provide insight into the many factors that impact Generation Y viewing. They were as follows: First,

determine a definition for the “prime time” viewing period and when students are watching. Second, determine the most popular genre of TV among college students, so as to better build a profile of Generation Y viewing preferences and thereby infer behavior. Third, determine whether the use of the Internet and DVRs increase television viewing. Fourth, determine the main reasons students watch recorded television and which Internet sites are most utilized. Fifth, determine if extracurricular activities impact the amount of television consumed and its affects on GPA. Sixth, determine if employment impacts viewership.

The results of the research answer many of these objectives, to a certain extent, and provide detail into Generation Y’s habits, particularly around timeframes for viewing. Regarding “Prime Time”, the study found that most participants understood the traditional industry definition of “Prime Time”, from 7 to 10 PM CT / 8 to 11 PM ET, however 92% reported their viewing hours closer to 6 – 12 PM CT, with the most popular days to view being Sunday (22%) and Monday (20.6%). In terms of content, research indicated that the top genres were situational comedies (36.6%) and televised sporting events (21%). From here the researchers dove into the heart of the issue and gathered information on alternative viewing and factors that contributed to it. They asked participants to share what their viewing times were both with and without the use of a DVR or the Internet. Without a DVR or Internet connection, 54.4% of participants indicated they watched 2 hours a day of traditional television and 26.8% reported 4-6 hours a day. When investigating the addition of a DVR and the Internet the researchers found that viewership increased, but for a smaller amount of viewers. Overall there was a downward trend of viewers at more hours per day, however, the addition of DVR and Internet viewing overshadowed viewing with only traditional technology at viewing levels of 3 to 8 hours per day. This shows that DVR and Internet viewing are not only an added factor in consumption, but contribute to additional viewing time; not simply directly replacing more traditional means with newer technology. The researchers also gathered data around why Generation Y’ers used DVRs and the Internet, finding that 47.2% indicated it was because they missed the scheduled program time. Many also indicated that they used the tools to avoid commercials. Regarding how campus involvement or alternative activities impacted viewing, the study found that 112 respondents, nearly 50%, were not involved in campus activities, and that of them 64% watched 6 or more hours of television. Additionally, those who were unemployed watched on average 2 hours more viewing than their employed

counterparts. Both of these findings seem fairly straight forward, indicating that a lack of activities coincided with increased viewing. There was no significant correlation found between the amount of television students watched and their GPA.

To conclude, the researchers found that DVRs and the Internet are increasing the amount of viewing by Generation Y and allowing them to have more control over when they view content. Additionally, they concluded that advertisers would need to leverage these newer mediums to reach the Generation Y demographic, as they trend towards non-traditional viewing methods.

The study had many limitations that did not decrease the value of their findings, but did leave many unanswered questions or additional avenues for discovery. Of these, there were two major limitations that should be accounted for. When addressing the topic of DVR and the Internet the researchers failed to differentiate between the two mediums, leaving questions as to which of the two mediums played a larger roll and to what extent. Those who watch television content via the Internet may have very different reasons for viewing and different habits than those who use a DVR. DVR viewing also implies access to a cable subscription, while Internet viewing in many cases can be attributed to free content or illegal viewing. Additionally, another limitation was the sample population. There was no indication that they had accounted for diversity within their study or researched into the background of any of the participants. These details may have played a factor in their results, as socialization and viewing habits may be a product of upbringing, personality, and socioeconomic status (Damratoski, Field, Mizell, Budden, 2011).

The influence of technology, economics and social factors are clearly present in Generation Y's choice of television content and viewing methods. What remains unclear is further insight into the many avenues by which these factors present themselves. As was presented, much research has been done to attempt to grasp these avenues, but the data is still incomplete. With the appropriate investigation done to understand our present knowledge base of the industry and its viewers, the following research was conducted, in an attempt to fill in some of the missing gaps.

## **CHAPTER 3: RESEARCH DESIGN**

In this section, the study's methodology and data gathering techniques will be laid out. The researcher will include details regarding the tactics by which the data were gathered and the analytical techniques that have been applied to the data set. Both traditional academic practices, such as surveys, and newer means of social communication, such as social media, were used towards the gathering of the data below.

### **Purpose**

An alternative method for viewing television programming content through the use of mobile devices is studied. This viewing model involves leveraging existing distribution and delivery systems in ways alternative to the use of a television set. The research sought to understand how quickly this transition is taking place, the cost the consumer is willing to bare to facilitate this transition, and what additional habits will be effected as this change takes place. To fully understand the contributing factors that impact a viewer's use of mobile devices for viewing television content, several research methods were used. This study relied primarily on points of datum collected through quantitative methods, however within this method of data gathering qualitative outlets were made available. Through this approach the study analyzed metrics surrounding user engagement and also used open-ended questions to gather a more in depth user response; one that may not fit into the structures defined by traditional quantitative analysis.

### **Procedure**

The approach of using quantitative analysis, with the addition of open response data, was a decision made by the researcher after a detailed review of the questions at hand. This approach was influenced by the complexity of the problem and the researcher's belief that the topics surrounding mobile viewing could not be fully studied with numerical survey data alone. Many of the questions surrounding the

study of mobile adoption are due to influences from social factors and the community one lives in. Due to this, it was determined that personal insights, rather than simple multiple choice, would allow for a significant amount of insight into viewers behaviors and how their decisions were made based on those they interacted with. This mixed method approach enabled the researcher to optimize the amount of data collected by providing an outlet that could adjust to the level of interest of the participant.

To conduct quantitative research, a comprehensive survey was created using the researcher's previous findings and analysis. This survey was comprised of forty-five (45) questions pertaining to the three identified topics of technology, economics, and social norms and conditions. Participants were asked to complete the questionnaire in a single sitting. The questionnaire was developed through the use of Qualtrics and shared in a digital link with participants through email and social media networks. This link was active for 3 weeks of time and the researcher made several attempts to alert possible participants of the survey.

Using an open-ended style of quantitative methodology allowed this study to tackle the question of why, as well as the question of when and how. Quite often in consumer media reporting, and as shared above in this report, there is a focus strictly on metrics to determine and predict consumers' behaviors. By combining a traditionally formatted survey, containing targeting and nontraditional lines of questioning, with a qualitative approach focused on emotional responses that guide behaviors, this study will be able to review consumer viewing habits from a different perspective than has been previously entertained.

## CHAPTER 4: RESULTS

This section will display the findings of the quantitative survey distributed in June 2015 through digital means. In total one hundred and ninety-nine (199) participants were engaged to take the survey, with a completion rate of sixty-eight percent (68%) or one hundred and thirty-five (135). Note that while there were a total of 135 fully completed surveys, many questions received upwards of a 179 answers or 90% response rate, which has made calculations more complex. Results below will highlight where this was present. Additionally, as the study is focused on the Generation Y or Millennial demographic, only data from participants between the ages of 21 and 35 at the time of the study, were recorded. Of those who attempted to participate in the survey, 94% (180) fell within the preferred demographic and 6% (11) were disqualified due to age. Eight (8) participants chose not to answer their age and were also disqualified automatically. The median age of qualified participants was 27.65 years old, with the most common participation ages of 28 and 29, both at 17% (31 participants). All ages within the defined demographic were represented within this study; specific details regarding the age of each qualified participant are listed in Appendix A. The survey questions presented to the participants focused on the three main categories outlined previously; technological factors, economic factors, and social norm factors that have contributed to an adoption, or lack there of, of television content on mobile devices.

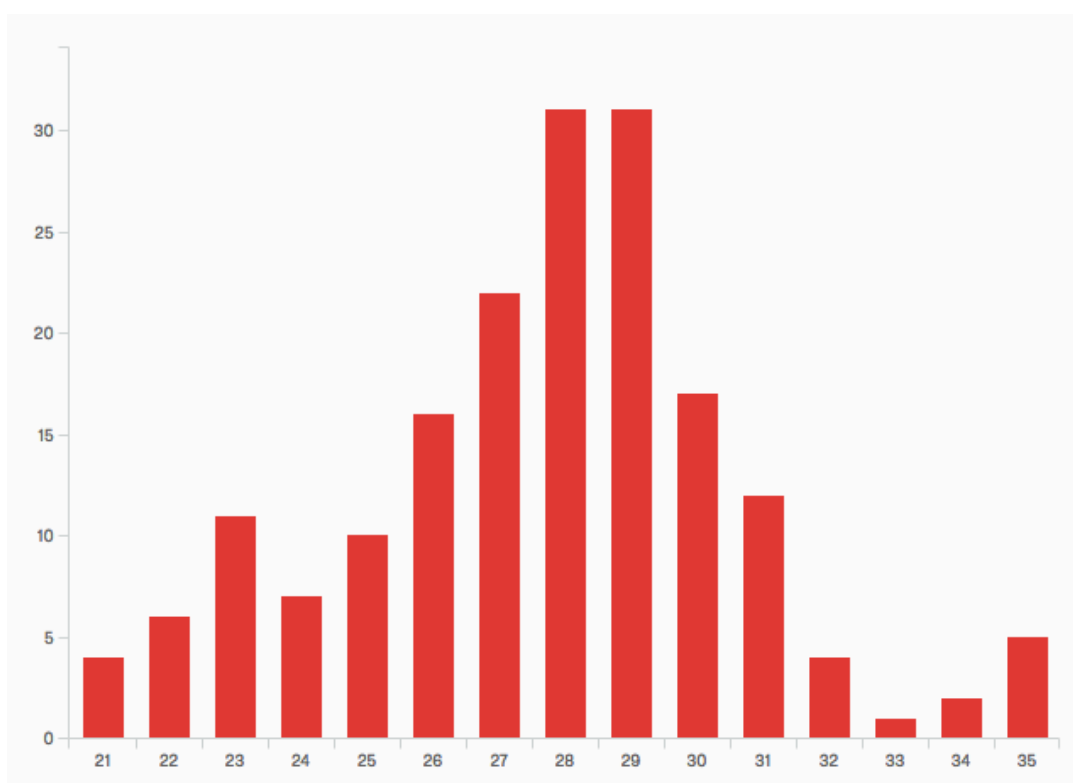
### Demographic Data

In the application of this survey, participants were asked to anonymously provide demographic data to further the understanding of the survey's reach. This information is essential to defining how viewers of various races, genders and geographic areas are participating in mobile viewing. Of all participants who responded to the question (179), 65% were female and 35% were male. Twenty (20) participants or approximately 10% chose not to answer the question, thus assuming they either do not identify with a gender or elected not to include a response. Racially the make up of the survey was less diverse than preferred, with 96% of participants (171) identifying as "White/Caucasian", 1% (1) identifying as African American, 1% (2) identifying as Hispanic, and 1% (2) identifying as Asian. Three participants or

2% identified as other. Other race options, not selected, were Pacific Islander and Native American.

Participants were also asked to note the location where they currently reside. All participants were located within the contiguous United States, with representatives from 18 different states. The most common of these was the state of Pennsylvania at 29% (52), particularly Philadelphia County at almost 21% (37).

Other notable states included Massachusetts at 17% (31), New York at 16% (29), and California at 13% (24). Full results of this data can be found in Appendix B.

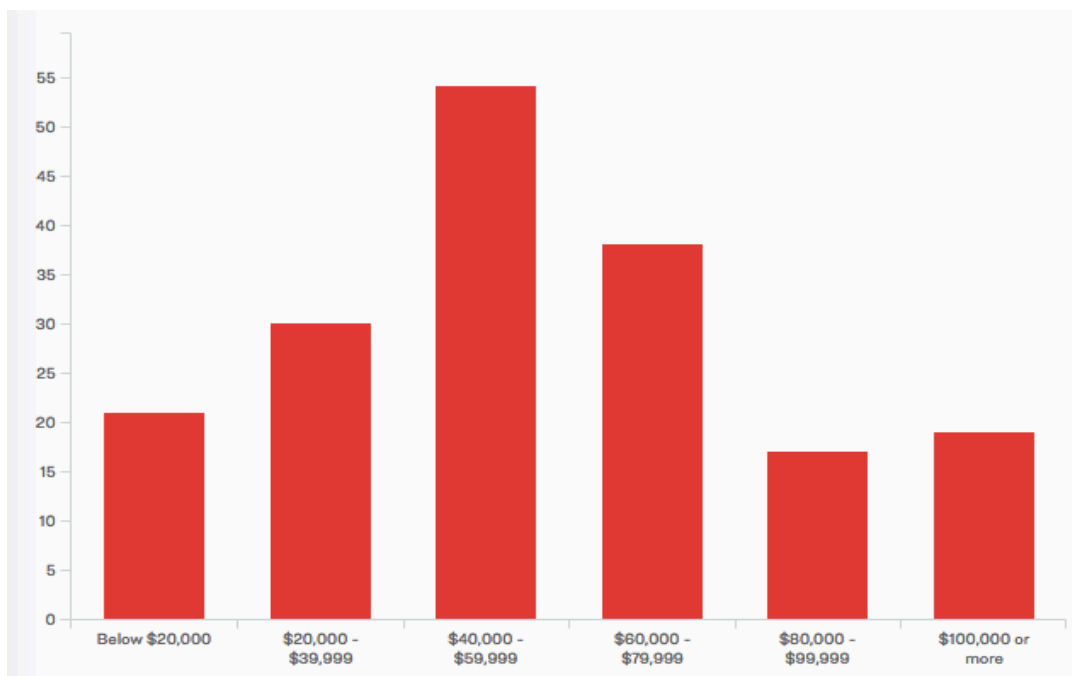


**Figure 1. Age Demographic of Study Participants**

## Economic Data

Economic data is an important factor in determining the financial decisions made by viewers. In tighter economic periods the decision surrounding expenses for “luxury” items can be highly volatile. Note, the discussion over whether entertainment and television content is a “luxury item” or a “necessity” can be debated thoroughly, however for the purposes of this research it will be defined as the former. Survey participants reported an array of economic conditions, which is typical for both their age demographic and for America as a whole (Pomerleau, 2014). Out of 179 participants, 30% (54), indicated that their individual income range was between \$40,000 and \$59,999 annually. For the purposes of this research we will define this group as “Middle Class”, based on IRS definitions. Below this group were 17% (30) participants who reported income levels below \$39,999 annually. For the purpose of this research we will identify this demographic as “Lower Middle Class”. At the higher end of our salary range were 30% (55) participants who listed their income between \$60,000 and \$99,999 annually; we will refer to these individuals as “Upper Middle Class”. There were also several outliers in this data, with 12% (21) individuals reporting income below \$20,000 and 11% (19) individuals reporting above \$100,000 annually. The average income across all participants was \$56,480. This median is roughly \$3,000 above the US Census Bureau’s 2014 calculations of median household income (\$53,482). Initially, the researcher felt that this indicated a fair representation of the larger U.S. population, however this would only be the case in the event that the individuals part of this survey were single income households (US Census Bureau, 2016). The identification of whether participants were reporting for single or dual household income was not fully gathered, so it is possible that the data set of this research may fall higher in income levels than the national average. The above data, however, will be instrumental in later discussions, as we seek to tie economic conditions to the viewing choice and behaviors of Generation Y viewers.

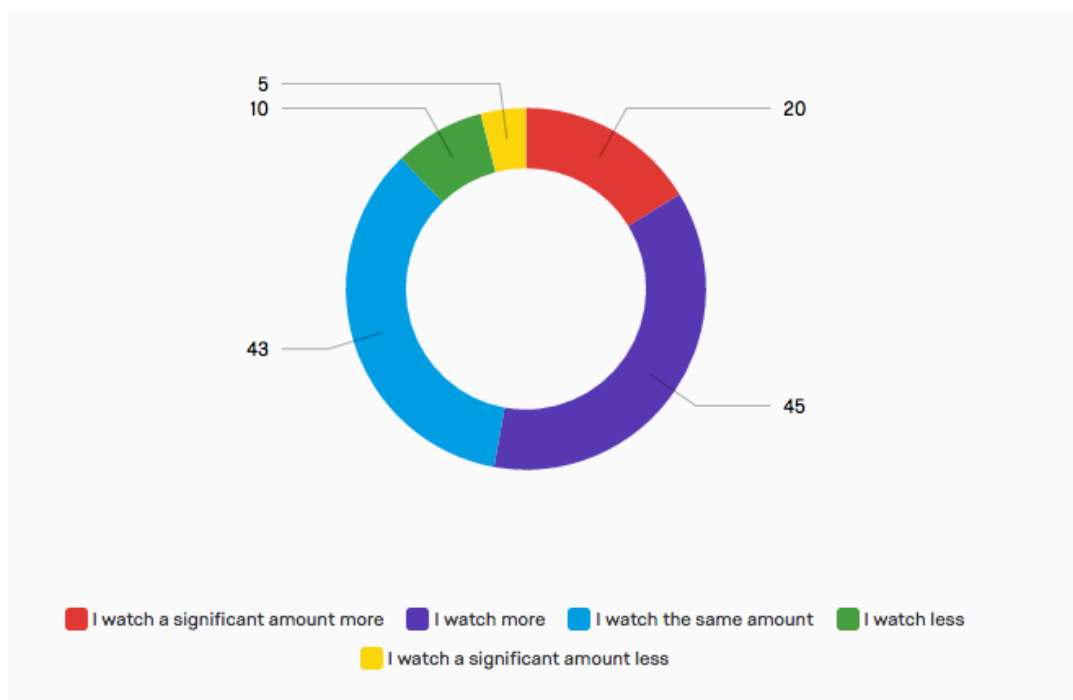




**Figure 2. Income of Generation Y Participants**

### Setting the Stage

This study set out to identify the impact that mobile viewing is having on the market and what factors are contributing to its rise. To begin, we will dive into arguably the most important statistic gathered through this research, time spent viewing content. Participants were asked to rate their viewing habits; specifically “since you gained access to web and mobile video viewing, how has this affected your viewing habits”. Out of 123 responses 53% noted that they “watch more” or “a significant amount more” content since obtaining access to Internet enabled viewing tools. This is a notable figure and one that dwarfs the 35% response from those that say they watch the same amount since obtaining the same access. Even before we dissect any further response data, this information alone outlines a clear trend that there has been a noticeable impact on viewing trends due to digital delivery of media. Our next steps will be to determine how and in what manner.



**Figure 3. Changes in Mobile Viewing by Individual**

### Access

Access to both viewing devices and content services are an important aspect of this research. Several questions were asked within the survey to determine what types of devices viewers use currently and what services provide them with their viewed content.

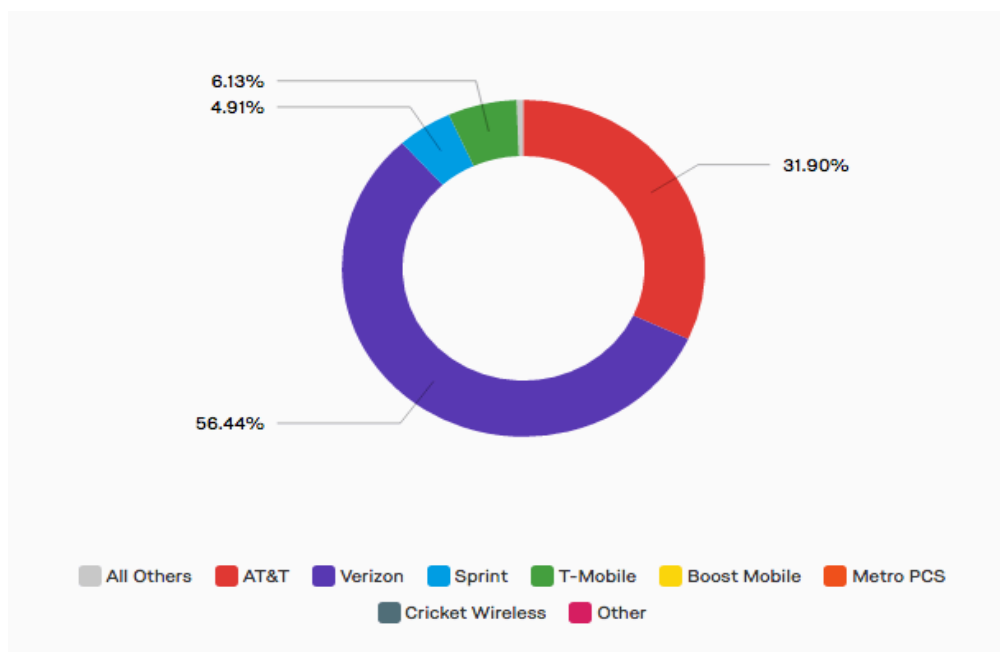
### Devices

As this research focuses primarily on the future of mobile viewing, within this section participants were first asked, “What is your access to a mobile device, particularly a smartphone”? This initial datum point is an integral piece to confirming any trend towards alternative viewing methods. To ensure that this was not the only piece of information gathered and to develop a more clear profile of each participant, the survey was built with a series of dependencies that guided participants down diverging paths, based on key

responses. The first question asked in this line of questioning was “Do you have a smartphone”. Based on this response, a participant was either directed to continue with the survey (if their response was “Yes”) or was guided to the end of the survey (if their response was “No”). This was done to ensure that answers regarding the use of mobile devices for viewing were limited to only those with the ability to do so. Out of 199 initial participants, 98% (196 individuals) indicated ownership of a “Smartphone”, with 96% (191 individuals) indicating they had a “data plan or frequent access to a Wi-Fi connection”. Furthermore, all 191 individuals who indicated they had either a data plan or Wi-Fi access for their smartphone confirmed that they had used their mobile device to view video content. This information shows that a significant majority of participants surveyed not only had ownership of a smartphone, but also had the resources to view digital content using the device, and had done so in the recent past. Additional research will be presented below to understand the frequency of viewing and what avenues participants have used to do so.

### **Services**

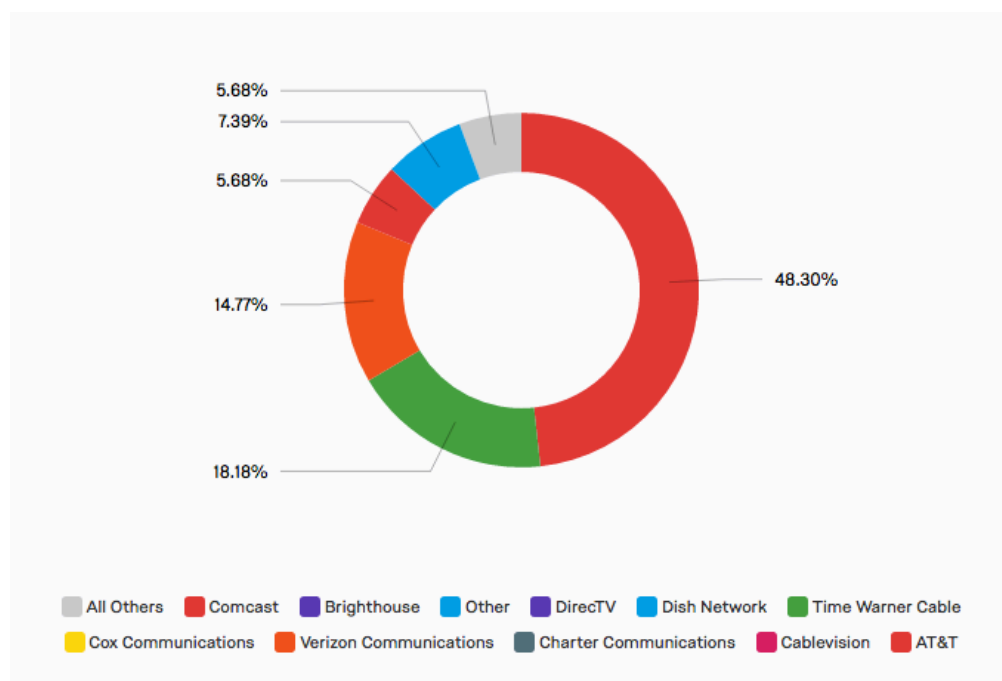
A key component to this research lies in understanding which organizations are impacted by the consumer’s transition to viewing content on their mobile devices. Participants were asked to indicate who they currently receive their contracted cellular service from, in order to both understand the current market and also as a means of further analysis, as the research attempts to find correlations between content providers and service providers. Seven (7) mobile phone carriers were selected from a list of the largest national providers and were shared with participants. Based on participant responses Verizon Mobile was the leading carrier at 56% (92); followed closely by AT&T 32% (52), and less closely by T-Mobile 6% (10) and Sprint 5% (8). Other considerations were Cricket Wireless, Metro PCS, and Boost Mobile, however, none of these providers had survey participants as customers. The trend of participants using many of the larger providers in the space could be attributed, in part, to the socio-economic results shared above. As many individuals that participated in this survey are of the Middle and Upper Middle Class, services with longer contracts and more expensive solutions would be more likely used, as we are seeing here.



**Figure 4. Mobile Provider Subscriptions**

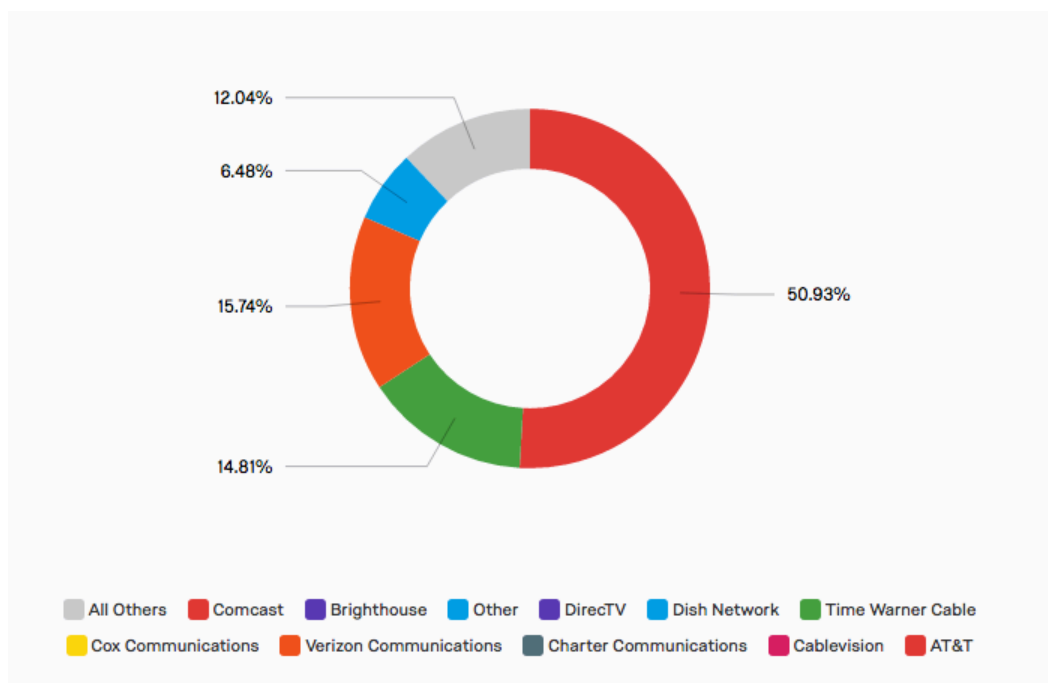
After determining participant's access to mobile devices it was important to the researcher to also understand what services the participants used for viewing and what alternative viewing methods were available to these individuals. This information was used to set a baseline for comparison of viewing habits and tactics. Several questions were asked of the participants to understand their viewing methods and their service providers. The first set of questions asked in this research were focused on the service providers available for both home viewing and mobile viewing. The survey showed that 99% (178 individuals) of respondents had an Internet connection in their home, with 99% of those (176 individuals) having Wi-Fi enabled as part of that service. This points to an almost complete proliferation of Internet connectivity within the homes in the demographic. This number is in contrast to the amount of participants with traditional cable subscriptions in their home, at only 69% (122 individuals). It is important to note the difference in subscriptions to both services. While this research is not focused specifically on the subscription of services at an individual's home for viewing, the difference between the types of subscriptions points to a significant amount of cord cutting among the demographic. Following this line of

inquiry, participants were then given a comprehensive list of the leading service providers in both spaces. A detailed analysis was done to determine which Internet and cable providers were servicing the participants of this survey, shown in Figure 5 and 6 below. The primary provider for both Internet and cable subscriptions was Comcast at 48% (85) and 51% (55) respectively. Following Comcast in Internet services were: Time Warner Cable at 18% (32), Verizon at 15% (26), AT&T at 6% (10) and Cablevision at 3% (6). As indicated in the diagram below, there were also several smaller competitors who were used by participants, in addition to 7% (13) who selected they used a provider not listed. Some of these include RCN, Pavlov Media, ClearWire and Optimum.



**Figure 5. Internet Provider Subscriptions**

The research then took a look into the category of cable services to compare usage with the findings of Internet subscriptions. Following Comcast's 51% (55) were Verizon Communications at 16% (17), Time Warner Cable at 15% (16), and AT&T 4% (4). Further details regarding the costs associated with these providers are discussed in the next section of this report.



**Figure 6. Cable Provider Subscriptions**

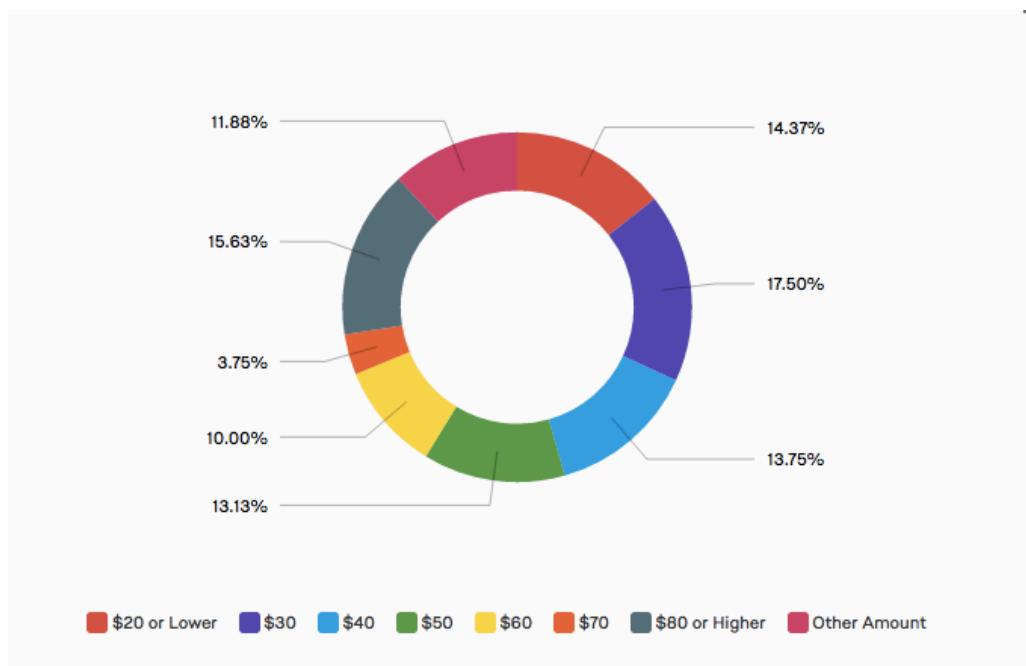
The researcher would like to point out here, while Comcast is a significant industry provider of cable and Internet services, many of these findings may be attributed to the amount of Pennsylvania, New Jersey and Maryland residents who participated. Within these DMAs there are very few other options for service, as Comcast has a monopoly on most of the region, with the exception of a minimal presence from Verizon. Regional monopoly may also be a contributing factor to the statistics reported for Time Warner Cable and the New England region, where there is a similar system in place.

### Service Costs

In addition to connectivity, this research spent a significant amount of time gathering data on the cost for access to these services, as well as what participants would ideally like to pay for each. While history will show that providers and consumers never truly see eye to eye on price, the television industry is

one of the leading examples of mismatch in perception of value. There are many factors that contribute to the decision to participate in a given viewing model, however as we have presented earlier in this research, economic factors play a large part in the decision making process. Data plans, cable and Internet subscriptions, and individual service license fees are all accounted for when making economic decisions. Consumers, more than ever, are constantly weighing the cost/benefit ratios of individual providers as they are increasingly presented with more options for accessing similar content. While each service may be priced individually, to many consumers, fees fall under a larger “entertainment” category comprised of an assortment of turnkey services that maybe turned on or off at will.

The first of these services is mobile data subscription plans. In the last several years, technological innovations have enabled Wi-Fi connectivity to share the burden of data consumption, as hotspots have begun to proliferate public places. However, the use of mobile data is still a popular commodity, as the following research shows, even though it accounts for additional costs to the consumer. Participants were asked to share how much they spent monthly on mobile data, above and beyond the cost of their telephone bill. Out of 160 participants there was a considerable diversity in the amount of data consumed, yet there was no leading group for any one spending tier. Fourteen percent (14%) or 23 respondents pay less than \$20 per month, with several grandfathered into free unlimited data plans. Additional respondents pay higher amounts: 18% pay \$30, 14% pay \$40, 13% pay \$50, 10% pay \$60, 4% pay \$70, and 16% pay \$80 or more. What is interesting to note about these prices is that the cost of data is not directly correlated to data usage. While there seems to be a large range of pricing for data, results indicated that 40% of participants pay for 3 GBs, followed by 21% who pay for “Unlimited” data and 12% who pay for 10 GBs. This indicates there must be significant pricing differences among carriers, especially around the 3 GB and “Unlimited” tiers.

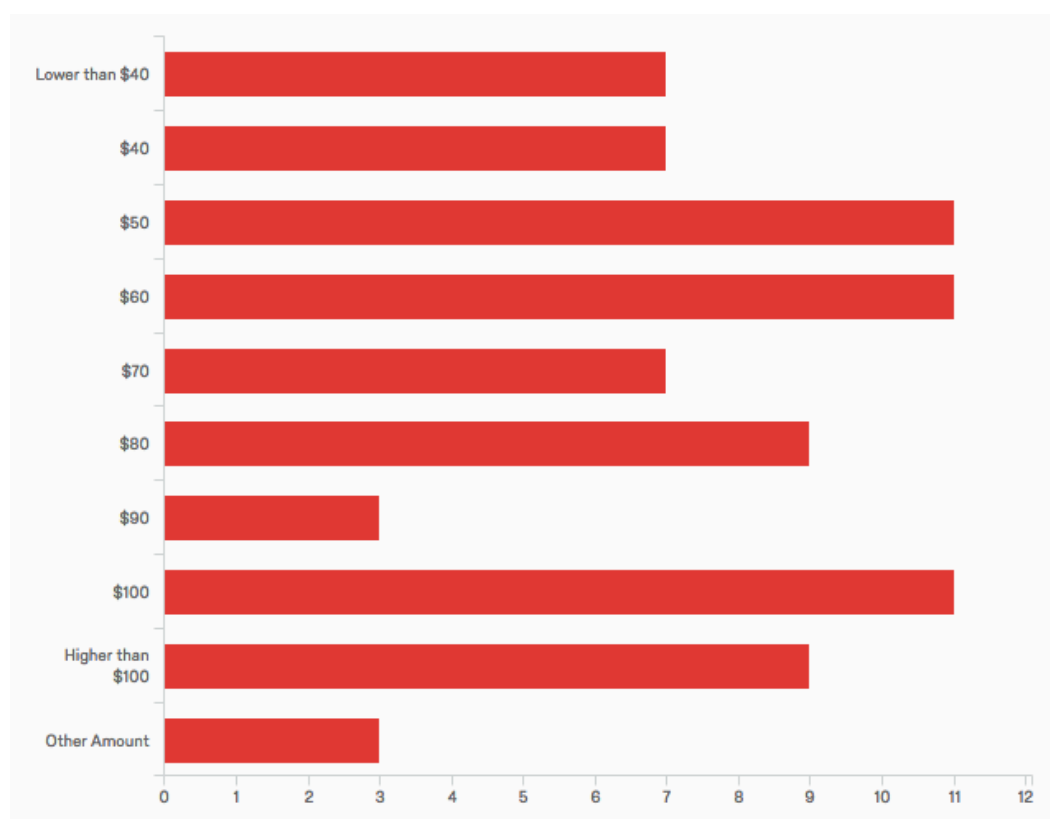


**Figure 7: Data Costs per Month for Subscribers**

Participants were then asked to indicate any excess use of data, beyond what they were allotted in their contracted plans. When asked, “Do you ever go over your data plan and if so by how many GBs”, 22% of individuals indicated that they go over their plans frequently, by anywhere from 1 to 4 GBs. While seemingly an innocuous figure, significance lies in the researcher’s follow up question. The same individuals, who noted that they exceeded their monthly data plans, were then asked to note how much of the overage they would attribute to media consumption. Answers ranged from 50% to 100%, as well as “Most” and “All of it”. Only 4 respondents of 24 indicated that none of the additional data was due to media consumption. This datum clearly indicates a trend of media consumption on mobile devices, and an acceptance for additional expenses for the purposes of viewing. Consumers, however, are typically fickle so the researcher preemptively added an additional question to this workflow to test out alternative pricing strategies. Those individuals who indicated that they spend extra for media were asked to then estimate what their pricing tolerance would be for unlimited data; “what is the highest price you would be willing to pay for an unlimited data plan to view video content across your mobile devices”. The responses to this question were wide ranging, considering the value that a service across unlimited devices and for unlimited



consumption would provide. The highest grouping of respondents, 31%, indicated they would be willing to spend no more than \$40 for this service. Of the entire sample set, the mean price of all participants was \$53. This datum suggests that there is a wide range of needs surrounding data consumption, however what is not clear is the primary use of this data. Findings towards an answer to this issue are discussed later in this research, as we discuss usage and viewing habits.



**Figure 8: Tolerance to Pricing for Unlimited Data Access (by number of Participants)**

The second and third services investigated in this research were the costs of cable and Internet subscriptions. As has been presented earlier, many individuals use the same provider for both of these services, electing to take advantage of pricing discounts for doing so. Out of 163 respondents, 77% (126) bundled their services with the same provider and paid an average of \$124 of this service, with a fairly

large range of \$30 to \$400. This disparity is most likely due to the level of add-on or premium cable services paid for (i.e. premium channels and cable packages, DVR, OnDemand) or the bandwidth of home Internet needed. Note that in many cases participants who paid for bundled services indicated that they only paid for a cable subscription because it came packaged with the cost of their Internet or the cost of cable was greatly reduced when the two services were paired together. Of the remaining individuals 16% paid separately for Internet service and did not have a cable subscription. These individuals averaged \$61 for this stand-alone service.

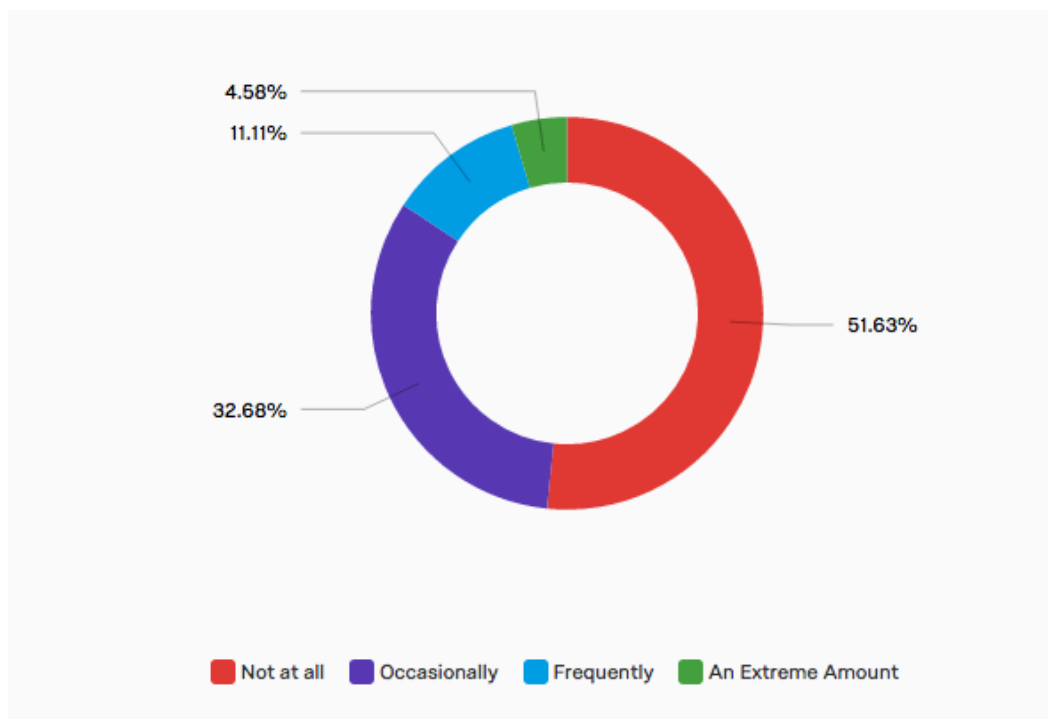
The fourth set of services used by consumers are pay-as-you-go or turnkey services that sit on top of either a cable or Internet subscription. These services, such as Netflix, HBONOW, and Amazon Prime, are purely content distribution products and require Internet services (via mobile or at home) or integrations with cable providers to be used. As a point of reference the below table shares access costs for each of the services mentioned within this research.

**Table 1: List of Leading Internet Paid Subscription Content Services**

Service	Cost (as of Dec. 2015)	Period of Access
HBONOW	\$14.99	Month
Netflix	\$7.99 - Basic \$9.99 - Standard \$11.99 - Premium	Month
Amazon Prime	\$99.00 (included as part of Prime membership. Exclusive access to movies, TV, books, music, and free product shipping)	Year
Hulu/Hulu Plus	\$7.99 – Limited commercials \$11.99 – No commercials	Month
Crackle	Free – Required commercial viewing within content	N/A
YouTube / YouTube Red	Free - YouTube \$9.99 - YouTube Red	Month

## Viewing Habits

There are many studies that have been done over the last 50 years regarding viewing habits of American television viewers. Studies differ in opinion based on the background of the researcher and reflect a range of academic approaches, from cultural to philosophical to psychological. Viewing habits and trends are a much larger field of study than this research would attempt to tackle, however the researcher did attempt to link this important topic to the current research by attempting to ascertain how cost and usage impacted individual consumption. The line of questioning directed at participants was meant to gather quantitative or numeric insights around viewing habits, rather than the qualitative or emotional factors; the results were quite interesting. When asked “how much does the cost of your cable and phone bill impact your viewing habits” 33% of subjects indicated that it occasionally has an impact, 11% said it frequently has an impact and 5% find it extremely impactful. Conversely 52% of respondents indicated that it has no effect at all. While we can see that there are those who view solely based on their emotional and creative leanings, nearly half of the population makes consumption decisions based on a cost/benefit analysis.



**Figure 9: Cost of Cable and Phone Bill Impact on Use**

## Device Usage

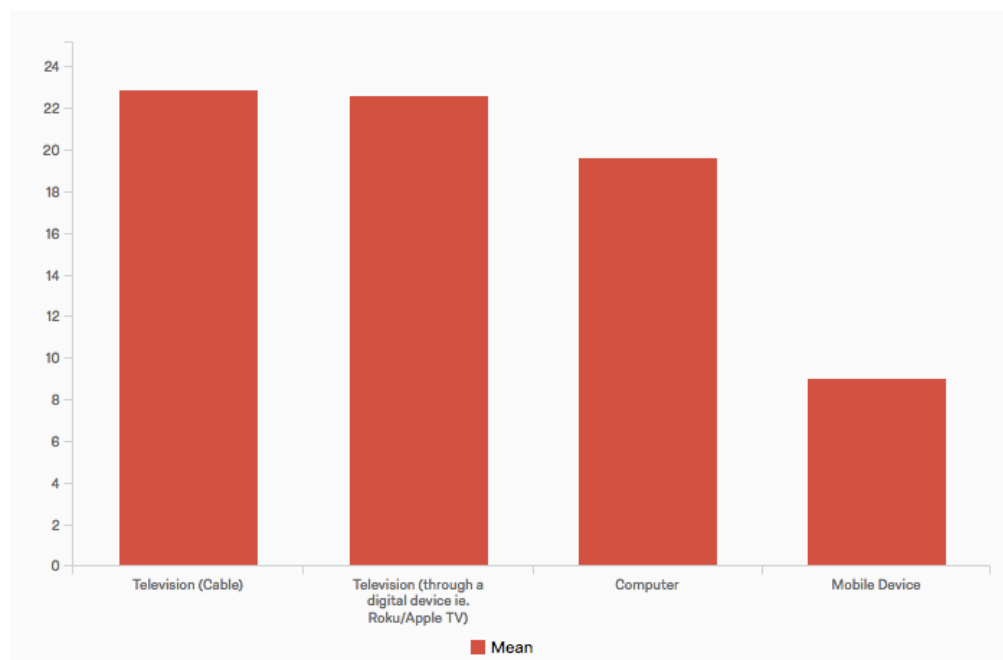
To set the stage for this research, one of the initial pieces of insight required is a general understanding of which devices viewers are using to access content and what their priority order is. While some individuals are mobile first viewers, others may be television or computer first viewers. This information is important for analyzing what trends, if any, are appearing with content consumption. To gain insight into this, participants were asked to rank the order of devices they used for viewing as either primary, secondary, or unused. The list of devices included were a television, computer, mobile device, and tablet. Out of 113 responses 64% (72) listed a television as the primary viewing device, 28% (32) listed it as their secondary device, and less than 1% (9) indicated that they do not use a television for viewing content in any way. Computers were reported as being the second most used device, with 35% (40) indicating that it was their primary viewing portal, followed by 53% (60) indicating it as secondary, and 1% (13) noting that they did not use a computer at all. Tablets came in third in primary device rankings with

1% (16) primary, 40% (45) secondary and 46% (52) not used. Mobile devices were interestingly last as primary devices, with only 1% (11) primary selections. However, 68% (77) of participants listed mobile devices as secondary devices. Twenty-two percent (25) of participants indicated that they had not used a mobile device in any way. These results seem to indicate a preference for viewing content primarily on television, with the secondary viewing option of mobile devices. To further understand some of the reasoning behind this decision making, the researcher asked users who did not chose a mobile device as their primary viewing device what their limiting factors were. An overwhelming majority, 91 of 127 respondents or 76%, indicated that screen size was the largest factor in their viewing preference other than a mobile device. Comments to this were: “I almost always have a larger device available”, “I don’t prefer my mobile device for long form video, due to screen size”, “I just don’t feel that a mobile device is made to watch shows on”, and “It’s small and inconvenient to hold”. Another 13 of the 127 respondents, or 1%, indicated that either data usage or the price of their data plan limited their used of mobile devices for viewing, followed by 8 individuals, less than 1%, who indicated that both data plans and screen size impacted their decision.

As an additional datum point, participants were also asked how often certain situational factors contributed to their choice of a viewing device: television, computer or mobile device. The factors provided were: location at time of viewing, time of viewing, and “who you are watching with”. For all three subjects over 50% of viewers noted that these situational factors determined their choice of viewing device, often or all the time. These results may contribute to lower frequency of mobile use, specifically during social viewing settings or when viewing is in the home; with an increase in mobile use when traveling or viewing independently.

The researcher continued in this study by breaking down the above findings to gain further insight into these habits. Subjects were asked to estimate how much time, in a given month, they spent watching video content on the above devices. The responses varied by device, with a television connected to cable and a television connected through a digital device (i.e. Roku or Apple TV) taking the lead. One hundred and fifteen (115) respondents averaged 22.89 hours a month watching through a cable television, 106 spend 22.55 hours watching through a digital device on a television, 127 spend an average of 19.61 hours

watching through a computer, and 139 indicated they spend an average of 8.99 hours viewing through a mobile device.



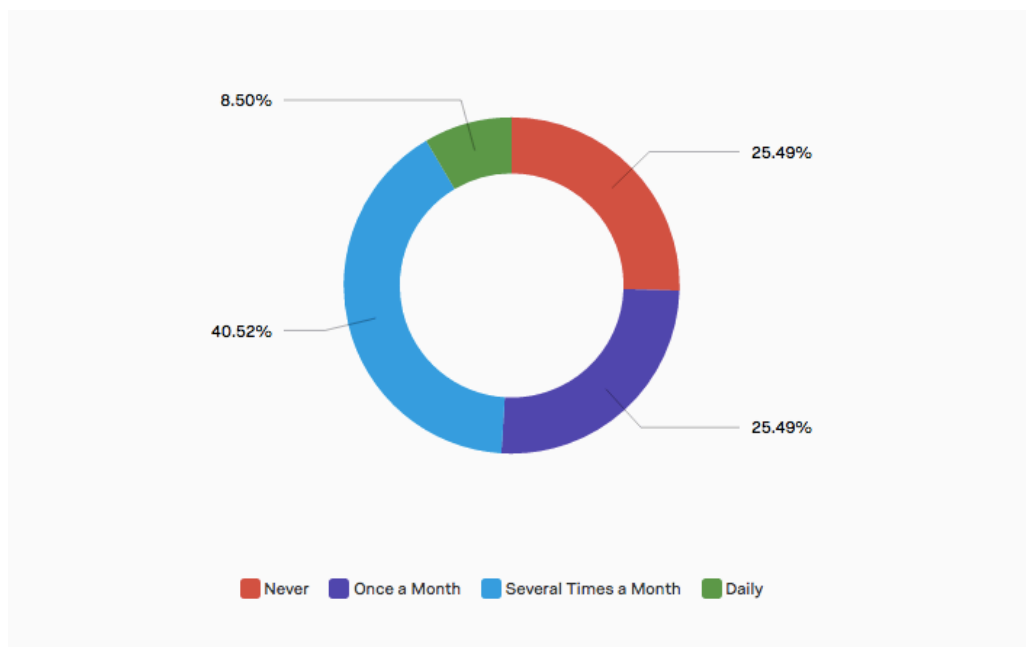
**Figure 10: Time Spent Viewing by Device in Hours Per Month**

In addition to gaining knowledge about the limiting factors around viewing on mobile devices and individual usage, the study also sought to gather data on how viewing devices were used in conjunction with one another. Recent technological advancements have allowed for the creation of viewing ecosystems and content sharing between users' devices. Participants were asked to reflect on this and share how they used their primary viewing device in conjunction with the devices they listed as either secondary or tertiary viewing mechanisms. To facilitate this line of thought, two distinct questions were asked of participants. The first question was, "Please share in detail how you use this device [primary viewing device] in reference to the other devices you use and what factors contribute to your use (i.e. convenience, affordability, travel)". The second question was "How often have you watched a television series using

multiple Internet enabled devices (i.e. one episode on a television, one on a computer and one on a mobile device)”).

Of all survey participants, 58 individuals shared details on how they used multiple devices together to enhance their viewing experience. Several indicated that their decisions were based on convenience at the time of use; for example one participant noted that “Mobile is used due to convenience, computer is used due to power and screen size (same as TV)”, while another said “Phone/Computer: easy to watch on the go”. The remaining majority of respondents indicated that “flexibility” and “portability” were also driving factors. These responses are expected, as the original purpose of a TV Everywhere approach and over the top viewing was to provide content quickly and independently of viewing location. Full participant responses can be found in Appendix D.

To the second question of “How often have you watched a television series using multiple Internet enabled devices (i.e. One episode on a television, one on a computer and one on a mobile device)?”, the results varied. The researcher found that 41% of participants indicated that they did indeed share content on devices several times a month, with 8% indicating they did this daily. Of the remaining respondents, 25% noted that they shared content viewing between devices once a month, and the last 25% did not perform this practice at all.



**Figure 11: Usage of Multiple Devices for Viewing a Single Piece of Content**

## Content is King

The television content and distribution industry has many large players that interface with consumers. After determining the devices that these participants have used to access content and the costs they were willing to pay to view, the research then delved into the specific digital channels that viewers were using and how they were leveraging devices to access these content libraries.

The first question that had to be answered within this topic of inquiry was what channel providers consumers were using to access content. After researching leading players in the market the following 12 providers/provider types were included: HBOGO, an individual Cable Provider/MVPD's web portal (i.e. Comcast or Time Warner), ESPN online, Network sponsored websites (i.e. ABC, NBC, CBS), Amazon Prime, iTunes, HULU, Netflix, YouTube, IntoNow, VUDU, and Crackle. The results showed that a majority of these services were used by more than 50% of the respondents, with Netflix and YouTube at the top. A breakdown by provider showed that 90% used Netflix, 84% used YouTube, 66% used one or more Cable Provider/MVPD's web portal, 57% used HBOGO, 56% used Amazon Prime, 50% used



HULU, 40% used a Network sponsored website, 35% used iTunes, 30% used ESPN online, 5% used VUDU, and 5% use Crackle. Zero participants indicated using IntoNow (upon further research IntoNow had shutdown its service between the time of research and completion of this report). Of those using Cable provider web portals Comcast, Time Warner Cable, Verizon, RCN, COX, AT&T and Cablevision were all indicated as being used. Of those using Network sponsored channels NBC, CW, ABC and NBC Sports were indicated. As a caveat to the above research, we must remember that usage of a provider or service does not directly correlate to a paid subscription for that channel, as often they are illegally accessed or shared with friends and family. The research anticipated this and further questioned participants to gather a greater understanding of how social circles and family structure correlate to viewing access.

Field	Yes	No
HBOGO	57.26% 71	42.74% 53
CABLE PROVIDER (Comcast, Cox, TimeWarner)	66.67% 80	33.33% 40
ESPN	30.77% 36	69.23% 81
NETWORK SPONSORED (ABC,NBC,CBS)	40.18% 45	59.82% 67
AMAZON / AMAZON PRIME	56.10% 69	43.90% 54
ITUNES	35.90% 42	64.10% 75
HULU / HULU PLUS	50.43% 59	49.57% 58
NETFLIX	90.00% 117	10.00% 13
YouTube	84.80% 106	15.20% 19
INTONOW	0.00% 0	100.00% 110
VUDU (Walmart)	5.41% 6	94.59% 105
CRACKLE (SONY)	5.50% 6	94.50% 103
OTHER	6.12% 3	93.88% 46

**Figure 12: Usage of Web Content Providers**

Ownership of content provider accounts is an important factor when reviewing access and industry trends. To investigate further into this topic, participants who indicated that they used each of the services in the above research were then asked whether they were the owner of the account they had used for viewing. The responses were staggering, with not one service having 100% of viewer ownership. The closest was YouTube at 88% and iTunes at 73%. Both of these services, however, are targeted more towards the individual than others, using a model that customizes content to the individual rather than simply being a portal for viewing. These are also outlets that are either free or require payment for individual pieces of content, which lends to a single viewer model. This may also point to why they had higher rates of adoption and individual ownership in previous data. The key insight from this line of questioning, however, is that a conversation around sharing of content is important for future planning. It touches on a fairly gray area within content distribution and syndication, the concept of what is approved or legal access to content. In the above research, access to content was being paid for by someone, either directly or within an identifiable family/friend unit. However, the sharing nature of this content access directly impacts the bottom line of content creators and distributors, as well as skews the metrics that measure viewing.

**Table 2: Ownership of Web Content Providers**

Provider	Yes	No	Total Responses
<b>HBOGO</b>	27	56	83
<b>CABLE PROVIDER (Comcast, Cox, Time Warner)</b>	54	42	96
<b>ESPN</b>	23	35	58
<b>NETWORK SPONSORED (ABC,NBC,CBS)</b>	30	30	60
<b>AMAZON / AMAZON PRIME</b>	51	36	87
<b>ITUNES</b>	48	18	66
<b>HULU / HULU PLUS</b>	30	49	79
<b>NETFLIX</b>	59	59	118
<b>YouTube</b>	81	11	92
<b>INTONOW</b>	1	36	37
<b>VUDU (Walmart)</b>	6	35	41
<b>CRACKLE (SONY)</b>	5	34	39
<b>OTHER</b>	2	18	20

As noted above, not all access to content is paid for or owned by an individual viewer. In addition to determining whether the individual participant owned their viewing channel, the researcher also prompted the participants to note how many total individuals shared in that single subscription. These results were also incredibly telling, with only VUDU, Crackle, and IntoNow having 2 or less participants. The largest shared services, indicated in the table below, were Netflix and HBOGO. Of those surveyed, 61 individuals or 52% shared their Netflix subscription with at least 3 other people and 33 people or 29% shared their HBOGO subscription with at least 3 other people. This points to a trend of shared ownership

within social networks and family units, where one individual is footing the bill for much larger consumption than anticipated.

**Table 3: Shared Use of Web Content Providers**

Provider	None	2	3	4	5 or More	Total Responses
<b>HBOGO</b>	56	23	10	12	11	112
<b>CABLE PROVIDER (Comcast, Cox, Time Warner)</b>	54	38	13	3	5	113
<b>ESPN</b>	82	10	5	3	1	101
<b>NETWORK SPONSORED (ABC,NBC,CBS)</b>	79	16	3	2	0	100
<b>AMAZON / AMAZON PRIME</b>	61	34	5	4	3	107
<b>ITUNES</b>	94	9	0	0	0	103
<b>HULU / HULU PLUS</b>	62	24	7	6	2	101
<b>NETFLIX</b>	18	37	19	23	19	116
<b>YouTube</b>	103	5	0	0	0	108
<b>INTONOW</b>	92	0	0	0	0	92
<b>VUDU (Walmart)</b>	91	1	0	0	1	93
<b>CRACKLE (SONY)</b>	92	1	0	0	1	94
<b>OTHER</b>	60	1	0	0	1	62

To more granularly delve into these content providers, the researcher also investigated how these participants accessed these specific channels, particularly if they did so on mobile devices and at what frequency. It was found that 60% of all participants used a mobile device and application to access at least

one of the services noted in the table below. Of those used, smart phones led tablets as the main viewing device, however only one application showed significant margins, YouTube. The remaining services had fairly balanced use on both smart phones and tablets.

**Table 4: Mobile Viewing of Web Content Providers**

Provider	Yes	No	Total Responses
HBOGO	30	37	67
CABLE PROVIDER (Comcast, Cox, Time Warner)	19	24	43
ESPN	20	13	33
NETWORK SPONSORED (ABC,NBC,CBS)	15	22	37
AMAZON / AMAZON PRIME	27	28	55
ITUNES	44	27	71
HULU / HULU PLUS	18	18	36
NETFLIX	61	57	118
YouTube	81	38	119
INTONOW	1	2	3
VUDU (Walmart)	2	2	4
CRACKLE (SONY)	1	3	4
OTHER	4	3	7

Frequency of use is also an important factor when analyzing viewing. The researcher sought to understand patterns around what applications were used most frequently and by what individuals. Participants were asked to rate if they use various subscription content services and whether they did so

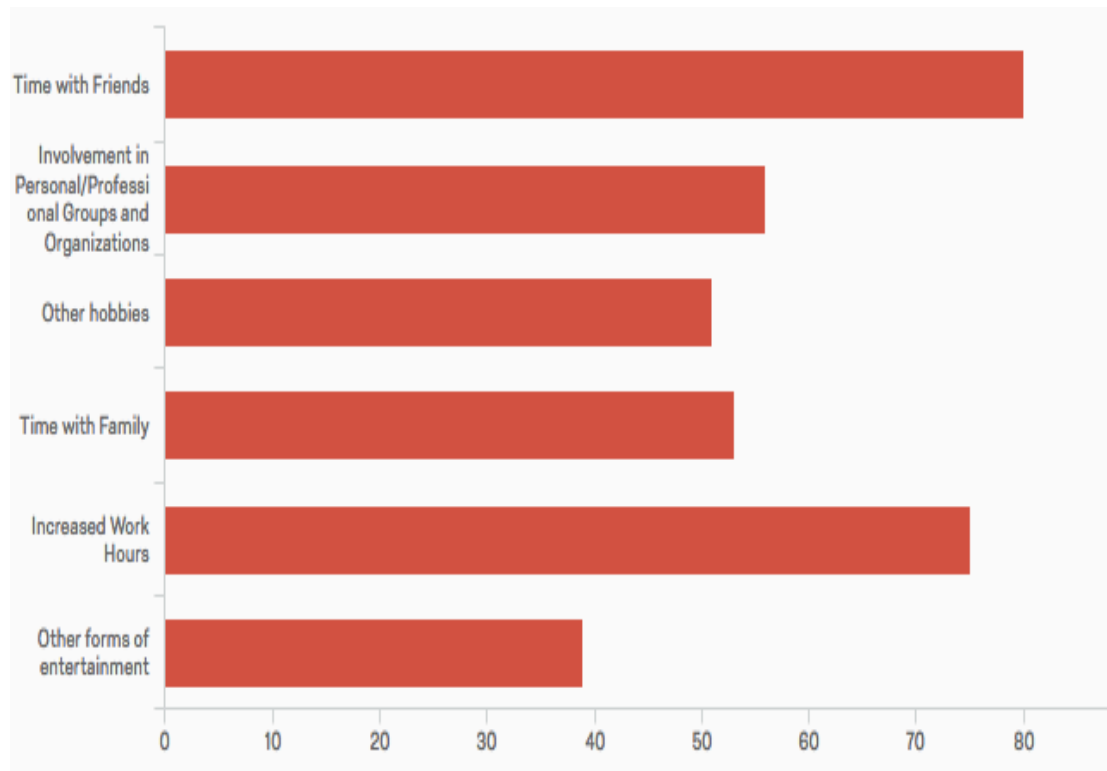
daily, multiple times a week, weekly, monthly, or never. The three most telling results came from daily use, weekly use and lack of use (never). Daily use by participants was the highest for Cable Provider portals at 25%, YouTube at 28%, and Netflix at 32%. At a weekly level there were many more services used with a high frequency: HBO 34%; Network sponsored websites 19%; Amazon Prime 19%; Netflix 38%; YouTube 40%. In the “never use” category all applications and services rated close to 50% or higher in lack of use, with the exception of YouTube at 17% and Netflix at 7%. These findings clearly show a high adoption and frequent use of the Netflix service and use of YouTube channels.

Provider content viewing applications are not the only way for individuals to interact with television and film content from mobile devices. The industry has also worked to develop supplemental applications that enhance the viewers experience with content and enable viewers to participate further in their fan experience. As an additional piece of insight, the researcher asked participants to note if they have used any of the following applications in conjunction with their television viewing. These applications were Flixter, a social movie site for rating and reviewing films; IMDb, the leading database of information related to film and television content; BeamlyTV, a social network for television viewers; TVTag, another social networking app for television viewers; and Roku, a streaming service for accessing content libraries. The use of these applications varied among users; IMDb was the most used at 90%, followed by Roku at 37%, Flixster at 12%, TVTag at 1%, and BeamlyTV at 0%. (Note: as of the completion of this research, BeamlyTV announced it was shutting down its application).

## **Viewing Habits and Competition**

In addition to studying the factors of why and how viewers access content, the study also looked to understand what additional activities viewers participated in. Survey questions specifically sought to identify those activities that participants reported as factors that pulled them away from traditional television viewing. In understanding what factors pull consumers away from viewing traditional television content, we can determine the scenarios where they are more likely to use portable methods of viewing. By determining this frequency assumptions can be made, using our earlier findings on mobile consumption, as to where mobile viewing is most likely to take place outside of the home.

Displayed in Figure 13, there are many factors that pull individuals away from television viewing. Of those, the two most significant are time with friends, 65%, and increased work hours, 60%. In addition to the provided factors, participants also indicated that reading, exercise, video games, writing, Facebook, concerts, and volunteering were activities that primarily competed with their viewing time. These are listed as “other hobbies” in the Figure.



**Figure 13: Time Spent on Alternative Activities**

## Usage Scenarios

As we have seen in the research, thus far, there are many ways that consumers access and pay for content. In anticipation of this, the researcher included a line of additional questioning to gather a more granular understanding of consumer behavior. These additional questions were presented in order to determine the willingness of a consumer to participate in various hypothetical re-orchestrations of current delivery and cost models. The goal of this tactic was to identify if there were situations under which consumers would be open to alternative methods of paying for the content they receive, through identified means of value to the content and service providers.

One of the more extreme questions posed to participants was a scenario in which they would have to give up their cable box in exchange for a bundled subscription fee, which included mobile and application viewing. The question was posed as such: “Would you be willing to subscribe to bundled data service that incorporated your mobile phone data and home internet services for viewing television content, even if it meant giving up a cable box? (You would need to use current web and mobile applications to view content)”. Interestingly a significant majority of participants, 64% (78), were willing to consider this option. This is a significant statistic, as it shows a clear willingness by consumers in the demographic to cut ties with traditional content sourcing devices. Note: this does not mean that they are fully willing to “cut-the-cord”, but rather would be willing to invest in alternative viewing paradigms. While many participants were aligned with this proposed model, they did differ greatly when asked what they would be willing to pay for this service. As we have seen earlier in this research, often needs and desires are aligned on viewing content, however the perceived value varies greatly. When asked, “Taking into account what you currently spend, what is the highest amount you would be willing to pay for this type of service?” [Bundled mobile and application viewing, in exchange for a cable box], responses ranged anywhere from less than \$40 to higher than \$100. No price tier (in \$10 increments) received higher than a 15% response rate, indicating that if this offering were put in place, a detailed pricing study would need to be done to evaluate what the ideal price point would be. However, from the current research the mean price point, and ironically the median as well, for this type of service would be between \$68-\$70.



In order to remove price as a factor and focus solely on emotional content consumption and investment four further questions were asked of the participants. These questions directly attacked the idea of tradeoffs over cost to the viewer; much like commercials on broadcast television offset the cost of viewing in exchange for 30 to 60 seconds of a viewer's attention. The first of these four questions was: "Would you be willing to allow an analytics company access to your mobile viewing data in-exchange for free content viewing?" While there are many industry tools currently active to gather portions of this data, Nielsen and others have had increasing difficulty gathering full details on consumer viewing on mobile devices. Participants were hesitant on this question with only 26% indicating that they would allow this access in exchange for content. The remainder of the group indicated that they would either "maybe" consider it (47%) or were not interested (27%).

As a follow up, the second question asked was "How willing would you be to accept push notifications from advertisers in exchange for paid data usage for content streaming". This question was intended to target the large fees that participants indicated they pay for data streaming, with the concept that a background notification may be more agreeable to a viewer than a 15, 30, or 60 second ad. To this question only 19% were willing to accept the trade off, 35% were undecided, and 46% were either unwilling or highly unwilling. The third question asked regarding alternative access attempted to discern how adverse consumers were to watching commercial content prior to accessing free mobile content. The question was, "How likely would you be to watch content through applications on your mobile device for free, under the agreement that you had to watch standard commercial content ahead of time?" This was met with a much higher degree of positive leanings than the former questions. Participants indicated that 58% of them were at least somewhat likely, or more, to participate in this type of model. The additional participants were either undecided (12%) or were somewhat unlikely or less interested (29%). The fourth and last question regarding alternative methods of accessing content fully stripped cost out of the equation, to focus solely on a likelihood of viewing with barriers. The researcher asked, "Would you be more likely to download and use mobile viewing applications if the content was free?" Options for answers were: 1. Yes, but with NO commercials; 2. Yes, with limited commercials; 3. Not interested in using new Mobile Applications for viewing. Out of 122 responses, 22% were willing to use new mobile apps with limited commercials, 65% were willing to view with limited commercials, and 13% indicated they were not

interested in new mobile viewing at all regardless of cost. This is a significant finding, as a majority of participants indicated that they would not only be interested in viewing new mobile content, but that they were open to the trade off of advertising to receive it.

The focus of this research was to gather data around the habits of Generation Y viewers and to provide a comprehensive understanding of the factors that contribute to these habits. While at face value the above data may seem to touch upon several different verticals, to find answers to the difficult questions surrounding viewer influences and adoptions we must look for answers outside of the traditional lines of questioning typically used by industry researchers (e.g. Nielsen). With the above data gathered and analyzed, the researcher was able to develop several findings, which will be discussed in the next section. These findings were made possible by attacking the research from several vantage points and using correlative analysis.

## CHAPTER 5: DISCUSSION

The purpose of this research stems from an attempt to better understand the nature of viewer interactions with technology, in order to determine steps forward for content makers, content distributors, and technology innovators. The principle hypothesis surrounding the study was that mobile devices are trending towards the role as a mainstay in consumer viewing and that they will in effect take over the role of a cable box as a means of content distribution and access. The above research collected a good deal of data that can be analyzed independently to understand specific pieces of the industry, or can be analyzed from a correlative viewpoint to gather much broader insights into the future of viewing. The research into Generation Y's consumption of media content through their mobile devices was attacked with two main objectives. The first was to gather raw data that provided insight into viewer habits and activities, and the second was to delve deeper into that data to determine where those habits will lead the television industry in the near future.

The first task, collecting of raw data, proved to be largely successful and added to the growing market insights around customer behavior and adoption. While a small sample set, this research provides a glimpse into the Generation Y demographic, outlining their interactions with content and providing connectors that have not yet been available or explored. This occurred in the research in several ways.

### **Technology**

Technology proliferation and consumer access was the first question investigated in this research. As the datum indicates, a growing number of Generation Y Americans have the ability to own multiple devices with access to television content, the flexibility to chose which of those devices they would like to use for that access, and once on the device, further flexibility to determine which content portal they would like their content served through. Particularly pertinent to these findings were several data points that showed the proliferation of technology across the demographic, for this sample set, regardless of economic status or geographic region.

As noted, the research found that the tools for accessing content are there. Ninety-eight percent of users owned a smartphone, 100% have used some form of mobile device (smartphone or tablet) for viewing, 100% had regular access to Wi-Fi and 99% had access to Internet in their homes. Clearly the distribution channels are already in place. The research also indicated that viewers used multiple devices when viewing content, quite often for the same piece of content. In terms of time, they spent, on average, 12% of their time viewing on their mobile devices and 26% of time on their computers. Combined, this datum indicates that 38% of the time, Generation Y viewers used a device other than a television set for viewing content. When they did, we saw an additional 30% of the time they were viewing content on their television through the use of an Internet enabled device (e.g. Roku or Apple TV). Cable television and content delivery is on a downward trend. It is clear that the legacy investment in infrastructure, and a corner on the delivery market, play a big factor in MVPDs continued profitability. Their monopoly on content, however, is being heavily challenged.

Although the research does point to a trend away from traditional viewing, what was surprising to the researcher was the low levels of mobile viewing reported. Real world observation and research into mobile adoption convinced the researcher that there would be a higher percentage of content viewed through mobile devices and more instances where Generation Y viewers were cutting the cord. One explanation for this may be that Generation Y is split between those who have embraced technological advances and those that are content with living on the periphery. With the evolution of mobile technology occurring during their mid to late teens, it is possible that this demographic was less conditioned than their younger counter parts, Generation X, to constantly be at the cutting edge of advancements. As the Generation Y demographic ages, the largest technological question, for researchers and the industry, will be whether they retain the loyalty of past generations or adopt those of those generations below them.

## **Economics**

As discussed above, economic factors play a large part in what individuals choose to spend their disposable income on. While there is still some debate over whether cable and Internet fall under discretionary/“Luxury” spending or a basic need, for the purpose of this study we will continue to define it

as the former. What is interesting is how much participants indicated they spend on these services and the fickle methods that their pricing decisions follow. The noted average for a cable and Internet bundle, the most common among participants, was \$121 per month or \$1,454 per year. Taking into account the median yearly salary of surveyed individuals (Gross \$56,480 / Net \$36,712 per year, based on 35% federal/state tax) access to these services amounts to 4% of their total net income. This does not even factor in the cost of additional alternative content providers, which we saw had significant use among participants. This is a much higher expense than what is paid by individuals who pay only for Internet subscriptions. Those individuals pay on average \$685 yearly, or half the amount paid by cable subscribers. When reviewed side-by-side, one can see there is a considerable difference in cost for the individual/household, as well as additional income that may be allocated towards alternative content providers (e.g. Netflix and HBOGO). Furthermore, when we add in cell phone bills, with data plans, amounting to \$563 or 1.5% per year, we begin to see the complex network of access and spending that consumers are involved in. Where this plays an important role in our research is when we begin to analyze how these financial factors are impacting individual's decisions and how they define the seemingly fine pricing thresholds that companies are working around. The research indicated that customers are fickle by nature. If we apply the above data to customers' answers around decision-making, we can see that small increases in cost or barriers to access created large repercussions among consumers. Additionally, rather than seeking out alternative providers for the service, consumers surveyed seem apt to share their subscriptions, when possible, or find alternative means of consuming. Of those with access to alternative content subscription services only 61%, on average, actually owned the accounts they access; with HBOGO (38% owned), Netflix (50% owned) and Hulu (51% owned) especially low. Of those that actually do pay for access, 46% shared their accounts and 16% of them shared with 3 or more individuals. Many of these services pride themselves in personalized viewing and the ability to customize various algorithms to deliver the consumer curated content. The fact that a large percentage of individuals still share their accounts, thereby negating this feature, is significant. This shows consumer willingness to cut corners on cost, even at the cost of experience and customization.

What we can gather from all of this is simply that consumers want more for less. This is consistent within our research as we specifically look at viewing on mobile devices. Even when presented with additional access to content through unlimited data, participants remained insistent on paying as little as

possible. When asked what they would be willing to pay for unlimited mobile streaming, 31% said no more than \$40, and another 45% would not pay more than \$60. Where this becomes interesting is when we compare it to what consumers are currently paying for viewing on mobile devices. The average customer currently pays for a little over 3 GBs of data (disregarding 21% of participants who use an unknown amount of unlimited data) at an average cost of \$47. When we compare this to the response to pricing for unlimited data, we see the cost figures are similar. This shows there is either low price elasticity or a lack of demand for more mobile data. Knowing what we know about the desire for media consumption and more access to data, it would seem we have discovered a clear resistance to increased cost for data. This becomes even more interesting when we discuss the attempts and future plans by many MVPDs to charge consumers based on the size of data consumption or usage for home broadband service, rather than a flat price for speed. While this has not taken hold thus far, it is something that will need to be carefully watched (Adegoke, 2012).

The above data begins to paint a clearer picture of the financial implications that access to content has on Generation Y and how it shapes their desires. The question that remains, however, is what is the right service for the right price point? When asked if they would be willing to give up their cable box in exchange for a bundled service containing all their media and phone needs, 64% percent of participants indicated they would be interested. The discrepancy is how much they would be willing to pay for the service. Answers ranged from less than \$40 to over \$100, however not one price level listed gained more than 15% interest.

### **Social Norms and Conditions**

When looking at the adoption of mobile viewing and trends toward these devices becoming a central hub for entertainment and content, we must not forget to account for the variable of social need and inter-personal interaction. Television has always been a shared medium, whether by viewing together or discussing with others post viewing. Unlike technology and economics, social aspects of influence are not always as quantifiable or easily broken down. Individual opinions or temperament are not only diverse, but ever changing and constantly evolving. The need for human interaction or alternative pastimes may also

change on a whim or ebb and flow with the course of a person's life. This research sought to understand, to the best of the researcher's ability, when these interactions impacted viewing and how they impacted the viewing decisions of Generation Y. Specifically, the research looked into the time spent viewing content with others, the social factors that impacted their chosen device and what activities competed with viewing time. From the research we can see that whom the viewer was watching with and the time of viewing heavily impacted the medium by which they viewed content. When only one viewer was involved we saw that individuals were much more likely to use their mobile device than if they were with another individual, which was expected. Conversely, we gathered that when individuals were at home they were also less likely to use their mobile device in favor of a larger screen.

Regarding the competition for viewing, many influences come from traditional social forces, while others may be newer and unique to this generation. The research indicated that time with family and participation within groups and organizations did impact viewing habits, however the largest competitors for time were increased work and time with friends. This is what separates Generation Y from other demographics, the trend of longer work hours and non-traditional family units. These are the items that battle most heavily with television viewing and occur during traditional prime time hours. However, with all of these competitions for viewing, the amount of content that participants indicated they viewed was far larger now than before they had access to mobile and web viewing. This can only mean that they are finding more time to watch content, but possibly in a less constrained format. Could they be watching content during their lunch hours from a mobile device, or on the train to work? These periods of movement and solitude, were traditionally, due to technological limitations, times where content was not available. However with access at any time or place viewers can now "get their fix" and still meet their additional work and social obligations as well.

## CHAPTER 6: LIMITATIONS AND FURTHER RESEARCH

This study attempted to determine the future viewing habits of the Generation Y demographic by accumulating data on current trends and attitudes. The researcher spent a significant amount of time focusing the survey's line of questioning in order to gather the most beneficial data, however upon analysis there are many questions that still remain and alternative tactics that could have been used. Further studies are necessary to fill gaps in the research that were unexpected or overlooked by the researcher. Several of these are discussed below.

Survey participants provided a good deal of insight into their technology usage and ownership, yet there remains additional insight we can gather. One of these pieces of missing datum is how often users change, replace and update their various viewing devices. Learning more about adherence to technology releases and tendencies to adopt new technology and software would tell us more about Generation Y's relationship and view on the devices they interact with. It would also shed light on patterns of spending and cost/benefit analysis thought processes used when balancing budgets. Additionally, further research should be done to see how the decreased costs of mobile technology and advancements in connected ecosystems impact viewing. Addressing the latter, the US is only in the beginning stages of connected devices and home viewing ecosystems. While the individual pieces are there, connected SMART TVs and the beginnings of Artificial Intelligence, most of Generation Y has yet to integrate these solutions fully into their daily lives. Once these individual technologies are able to speak more seamlessly to one another further research should study the impact they have.

From an economic perspective the researcher found many additional questions that could and should be asked. It may be important to gather datum from customers on what their thresholds are for cable expenses; is there an increase in cost that would make cable cost-prohibitive and more quickly push them towards other content access points? Additionally, further datum on the perceptions of "entertainment" expenses would be valuable. Do consumers view cable and Internet as a discretionary expense or a must have, and where is that line drawn?

From a social perspective, there are a plethora of additional questions that may be asked. The research attempted to target specific viewing habits and scenarios that might compete for a viewer's time,



but this topic warrants much further examination. Additional research could be done to specifically monitor viewers over time and determine their habits from a longitudinal perspective and not a snapshot view. This would most likely provide more detailed data on what competes with viewing and when those factors are more or less influential. It would also provide further insight into overall trends of viewing, collecting information over time on how much time is spent on each device. Another social factor that could be addressed in future research is the finding that a majority of respondents blamed increased work as a factor that deterred them from viewing video content. Further research should be performed to correlate the competing philosophies of “work hard play hard” environments vs. “work life balance” environments and their relationship to viewing. This may lead to further learnings around what influences viewing, the types of content chosen, and when within a consumer’s schedule.

From a demographic perspective the researcher also would have preferred a more racially diverse sample set; one that more accurately represented the US’s Generation Y demographic. Although data for this research was collected using the best practices and resources available to the researcher, and every effort was made to collect data from a sample set that represented the Generation Y demographic and its population, this was not achievable. While the researcher was able to access participants from a variety of socio-economic groups, the sampling of African American, Asian, and Latino members was less than ideal. If attempted again, the research would benefit greatly from more participation from these racial groups.

Finally, regarding the acquisition of the data, the researcher could have done a better job at fully collecting insights from all participants. While several months were spent on building and fine-tuning the survey, additional efforts could have been made to make some of the questions more clear and finite. There were also several instances where participants were given the option to avoid a question and still complete the survey, which resulted unintentionally, in some regards, in incomplete datum.

## CHAPTER 7: CONCLUSION

This research sought to fully explore consumer-viewing trends and how they access the media content that they consume. While the research left many questions unanswered, requiring further exploration, two factors seem to be clear. First, although the adoption of the smartphone and internet enabled mobile devices is increasing towards full penetration in the demographic, consumers are still holding on to the idea of the television as being their primary viewing screen for most forms of content. Second, contrary to the researcher's hypothesis, consumers at this time are unwilling to part from traditional means of content access and their cable boxes. While many cord-cutters and cord-nevers are present in the market, and there is a clear trend towards increased demand for affordable or free content, there remains an aversion to cutting the cord entirely. This seems to point to a larger psychological tie to preconceived notions surrounding both media consumption and media cost. At this juncture the cost of consumption, although rising, has not yet reached a tipping point for most consumers to make impactful change. Part of this may be due to a lack of options, however this researcher believes that it may have more to do with consumer tendency to make subtle changes over time to their viewing and a resistance to challenge the comfort of the status quo. The researcher predicts that the future of television may not be, as originally thought, an introduction of new methods of viewing or even content distribution, but rather more advanced algorithms and insights that deliver targeted content to individuals, based on their preferences and historical viewing. Added to this will be revised subscription models, which will rely on consumption-based pricing for data independent of the device/portal used or the video content viewed.

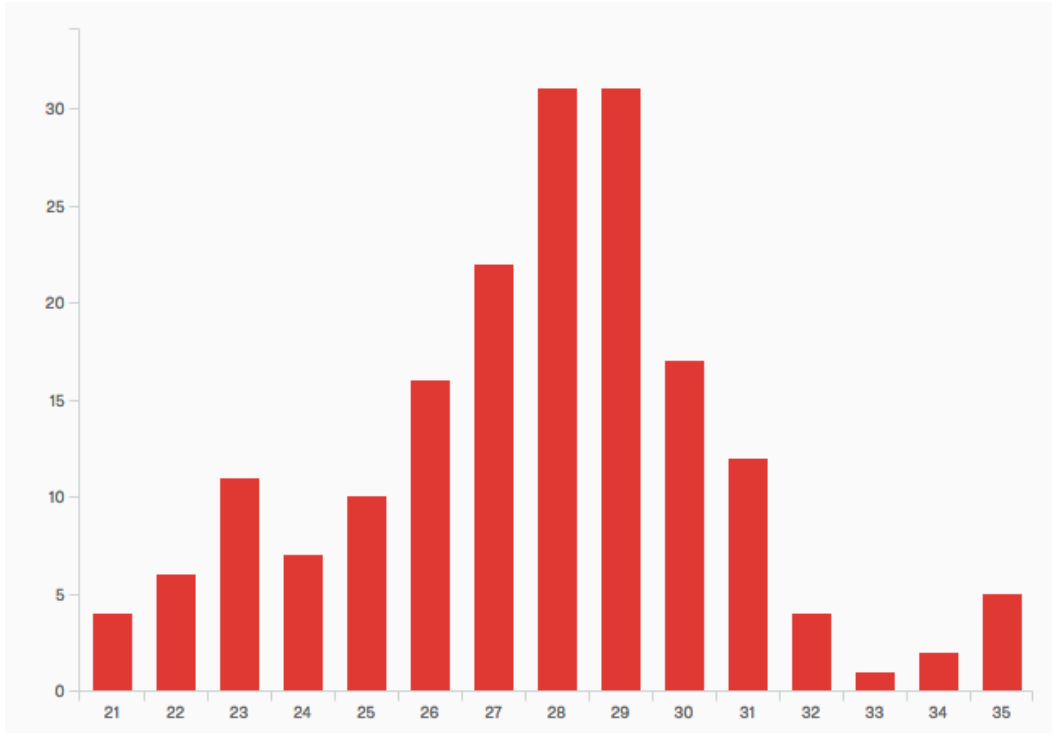
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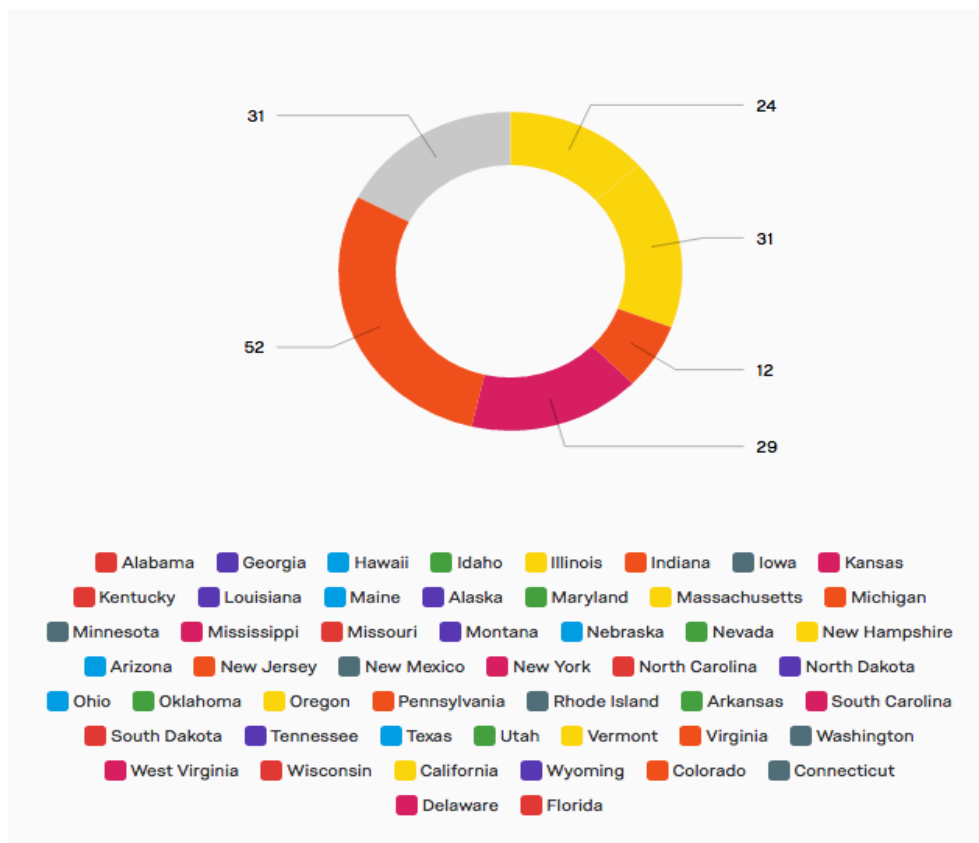
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**APPENDIX A: Age of Survey Participants**

### APPENDIX B: State of Participant Origin





**APPENDIX C: Racial Makeup of Participants**

#	Field	Choice Count
1	White/Caucasian	95.53% 171
2	African American	0.56% 1
3	Hispanic	1.12% 2
4	Asian	1.12% 2
5	Native American	0.00% 0
6	Pacific Islander	0.00% 0
7	Other	1.68% 3
		179

## APPENDIX D: Factors Influencing Device Usage

Responses to Question: “Please share in detail how you use this device in reference to the other devices you use and what factors contribute to your use (i.e. convenience, affordability, travel)”

1. Convenience, frequent traveler, large device size
2. Convenience
3. travel
4. Bigger screen, better sound, more comfortable to watch
5. convenience, mobility, access to more content
6. I love my Roku, and my TV has a huge screen.
7. Travel & convenience
8. Convenience
9. I use my phone when I am not home, I use my tablet and my TV when I'm home.
10. Using my Blu-ray to stream Netflix is the most convenient
11. Mobile viewing of videos on a train daily, television at night
12. Convenience.
13. travel/convenience
14. I use my tablet for video watching because of convenience and accessibility.
15. phone is smaller and more convenient to watch on the go
16. Watch video content on TV (biggest screen) and then tweet or read about show via generally mobile (convenience), sometimes laptop
17. convenience
18. convenience
19. Mobile is used due to convenience, computer is used due to power and screen size (same as TV)
20. Don't know what device you're referring to.
21. Wi-Fi access
22. convenience
23. can watch with other people
24. Convenience and I usually watch TV at home where a television is available
25. It's easy to use the TV to stream videos through our Roku.
26. Larger screen for viewing, usually at night in my home.
27. Use my tablet and home Wi-Fi to catch up on episodes I've missed on cable.
28. Ease of portability during travel increases my use of smartphone
29. convenience
30. Maps email and social networking
31. I generally use the DVR on my TV for current shows
32. Travel and personal watching
33. time and convenience
34. I have Chromecast attached to my TV downstairs so I stream from either my phone or computer, upstairs I will use my tablet or phone
35. convenience
36. convenience, affordability, easy to travel with my computer
37. affordability, no TV in bedroom so use tablet or computer there, travel
38. Phone/Computer: Convenience...easy to watch videos on the go
39. convenience, use my tablet because it has less features than my computer, so I can do two things at once if I watch on my tablet and work on my computer
40. convenience, multitasking
41. Tablet is easy to carry around, TV is used when sitting down at night
42. I don't understand this question.
43. I use it for convenience when my roommate is watching TV and I don't have my computer, or when I travel

44. Convenience
45. Convenience and affordability are the biggest, don't want to pay for extras that I don't use
46. Apple TV has HBO go and Netflix, our primary media outlets; our TV has the largest screen of all our devices.
47. Instant Access
48. I like to listen to media when I have no service on trains, I like to watch shows at the gym
49. Convenience
50. Tablet functions as a smart TV remote to stream to TV over Chromecast or AppleTV
51. convenience, video and sound quality
52. size of screen, speed of connection
53. convenience
54. convenience
55. My tablet is the most convenient to use. It holds a long charge, has a high quality picture and good sound.
56. convenience
57. convenience, comfort
58. Portability and best quality of video offered

## APPENDIX E: Device Usage Viewing Preferences

Responses to Question: "Please share in detail why you are not inclined to use your mobile device for viewing (i.e. Screen size, Data Plan, Cost)"

1. Screen size only
2. screen size, other alternatives
3. Screen size
4. I have an iPhone 6+, I use it as my primary mobile boring device and dumped my tablet.
5. Size of viewing screen, kills battery life
6. screen size
7. Small screen, can't find a comfortable position to sit in and hold the phone at the right height, usually will watch with headphones which are annoying
8. screen size, data plan
9. Data
10. screen size
11. Screen size
12. Screen size
13. Screen size
14. The screen is too small, so I would use my tablet to view anything if I was in a Wi-Fi area
15. Screen size, data, and I have an iPad
16. smaller screen
17. Data plan cost
18. Data Plan and Screen Size
19. screen size, data plan, load time
20. Data plan-I have unlimited but after certain GB the speed reduces
21. Better resolution on the TV. I would not buy a smartphone with a screen larger than my HTC One M8.
22. Screen Size
23. Screen size
24. screen size
25. screen size, battery, data plan if not connected to Wi-Fi
26. Screen size
27. I just don't feel that a mobile device is made to watch shows on.
28. Data Plan and Cost
29. too small
30. Screen size and limitations compared to laptop or tablet
31. Screen size
32. screen size
33. screen size, buffering
34. screen size
35. Screen size, Data Plan
36. Screen size
37. I don't watch television series
38. Screen Size
39. Screen size
40. Screen size
41. If I had an unlimited data plan, I would use my phone as a hot spot to watch video. However, I do not watch full TV episodes or movies on my mobile device because my screen is too small (even though I have an iPhone 6).
42. Convenience. My laptop/TV are usually all right by me. Prefer those screens. Don't have to hold it.

43. Primarily Screen Size.
44. don't want to go over data plan and screen size
45. data plan
46. screen size
47. data
48. screen size
49. Screen size, video quality.
50. screen size and download/streaming speed
51. Screen size
52. we do use our iPhones and iPads, but it would be better with unlimited data
53. Screen size
54. Small, only during travel.
55. Cost of data.
56. Screen size and small keyboard
57. Battery, speed, data, screen, volume
58. data plan
59. Data use
60. Convenience
61. Screen size
62. Screen size
63. I'm rarely in a situation where I would have to watch on my phone and have the time to do so.
64. Screen size
65. Screen size, no good way to stand it up
66. screen size, keeping data costs low, when I have Wi-Fi other devices are more enjoyable to use
67. my screen is cracked. It's too small.
68. Small screen size vs. the TV, and its harder to share the content with spouse
69. smart TV
70. data plan cost/overage
71. screen size
72. I almost always have a larger device available
73. screen size
74. screen size
75. Cost really.
76. Screen size and quality. Prefer on my big TV, Blu-Ray when possible
77. data plan and screen size
78. Screen size plays a factor, but when I'm not at home in front of my television I try to stay clear of using mobile devices for any extended viewing just for personal preference - trying to get away from the constant cell phone use.
79. Reading or listening to music
80. Screen size
81. screen size
82. N/A
83. screen size & data plan
84. multitasking, waiting on phone call or message
85. screen size and data plan
86. Screen size, availability of more suitable devices
87. Screen size primarily, but also the inconsistent quality of streaming services via mobile devices
88. Screen size, data plan
89. Screen size, and I have a tablet for viewing
90. it's small and inconvenient to hold.
91. screen size
92. I only use my phone on Wi-Fi and don't like to use it because it's small.
93. Screen Size
94. I'd rather watch on my television. I'm not a big fan of video content if it's not a movie or television show - especially when it comes to news, I'd much rather read a news story than watch a video. Also worried about data.

95. Screen size, also don't watch too much TV
96. Too small of a screen
97. I use my mobile device only for streaming live TV (which I cannot do on my TV, since it's not my account), and watching YouTube.
98. Data Plan Cost... Don't want to go over limit.
99. trying not to go over data which I sometimes do
100. small screen
101. Screen Size, It's more comfortable to lie on the couch and watch TV/video/movie rather than watch on your phone and hold it for viewing. Phones also get hot after a long amount of time.

## APPENDIX F: Limiting Factors of Mobile Device Viewing

Responses to Question: “What factors have limited your use of a mobile device for video viewing?”

1. Battery charged and Wi-Fi networks
2. Airplane mode.
3. n/a
4. data plan, screen size
5. I watch TV only on nights and weekends
6. Screen size & data plan
7. Size of screen
8. Screen size
9. If I am in a non Wi-Fi it may affect me because I may choose not to use video viewing to save data
10. Too small, not good for groups, hard to hold up/keep balanced
11. Location of viewing
12. Data usage
13. Poor connection and app reliability
14. n/a
15. Data plan, battery life
16. Spotty connection while driving through rural areas.
17. Screen Size
18. data, screen size
19. Have better alternatives
20. I just don't do it
21. Cost and Data Plan
22. cannot find Wi-Fi or low on data allowance
23. Size and needing to hold the video; it's ok for short videos but nothing longer
24. bad service
25. Screen Size, Connection when viewing (Wi-Fi not available)
26. Amount of data
27. I don't watch TV
28. screen size, short battery life
29. I just prefer watching on a bigger screen
30. Lack of Wi-Fi in location
31. Screen Size, data usage
32. Wi-Fi connection; it can wait till I'm home
33. No access to Wi-Fi.
34. size, data
35. International Travel and VPN
36. screen size, ability to watch with others
37. if the internet connection is good enough so that it's not constantly lagging
38. Speed and size
39. Screen size
40. Uploading ability
41. Size
42. Who I am with, location.
43. Streaming signal
44. Data
45. Data plan
46. It's unnecessary when I have a television with connected devices

47. small screen size
48. small screen, don't like to use data, watching on a laptop is more convenient if I am on the go and have Wi-Fi, I use a TV as a monitor for a desktop computer at home and generally catch up on shows on that
49. The content I want to watch is hard to access
50. Wi-Fi connectivity
51. Size, connectivity, location, other obligations
52. small screen
53. Battery Life, If I'm in public sometimes
54. Life, I don't care to.
55. Other hobbies or interests with the phone
56. Screen size
57. Internet availability
58. who I'm watching with, internet availability
59. When I'm home I have access to computers and TV, so a phone is not necessary for viewing. When I'm out I have my phone but I don't want to spend time watching videos on it.
60. Screen size, rarely need to use a mobile device as I plan on being home when I want to watch something
61. you asked this earlier
62. Cost
63. Screen Size, Connectivity
64. Size of screen, don't watch a lot of videos
65. Slow internet speed; if someone is on the computer and also many people are drawing from the Wi-Fi, the iPad or computer may be slow; I hate buffering -- which is why OnDemand is preferable for me
66. Battery life!
67. Data Cost / Working Data
68. access to Wi-Fi
69. Holding the phone. I would rather have a large TV playing so I'm not glued to something so small. I can move around and still hear and see TV
70. screen size
71. Data
72. Don't really watch a lot of stuff anymore
73. Bandwidth over non Wi-Fi connection
74. data plan, screen size
75. TV is enough, don't need mobile video too
76. connection speed
77. Size, data, sound- phones suck for video
78. Screen size, lack of ability to share it with others at the same time, inconvenient
79. Service Connection
80. No Internet connection, poor quality, location.
81. size
82. screen size
83. Data mostly



## APPENDIX G: Ideal Content Viewing Methods

Responses to Question: "Explain what your ideal content viewing method would be regardless of device and cost."

1. Online streaming to a TV via apple TV or something similar
2. Seamless switching between Apple devices (not having to use airplay)
3. TV or tablet
4. Paid content. Either subscription or one time purchases. No ads.
5. iPad
6. regular TV with the option of using on tablet when travelling
7. TV recorded on DVR
8. Television with cable and internet access
9. TV - on demand is my ideal method of viewing, because I don't have a set time and place for watching
10. On my TV
11. Television with cable box
12. I like watching a large TV in my living room verses a smaller screen somewhere else
13. Apple TV
14. I would like to be able to view Netflix, HBOgo ETC anywhere, anytime without affecting my data and making me go over my data. Then I can use my phone more for viewing !
15. Selective TV channels or individual shows that could stream to all devices (mobile, tablet, TV) we don't pay for cable because of the cost and too many things we don't want to watch.
16. Streaming on a TV
17. Television
18. Apps via Smart TV, Game System, etc. Ideally, I'd like to choose a "package" of service where for a set price, I can choose which network apps I want to "subscribe" to and create a custom viewing hub with exactly the content I want.
19. There was no buffer issues and I didn't need to input my current providers information
20. Seamless same episode viewing between TV and mobile. Especially ability to download an episode to go to avoid data plan issues.
21. Streaming on my desktop computer while hooked up to its 48 inch screen.
22. Television
23. On demand television for all content.
24. cable
25. TV
26. I like something that syncs to both TV and tablet - easily viewable around the house. Phone screen is too small and kills battery to watch content. Battery can be annoying in tablet too.
27. My preferred viewing method is on a flat screen TV
28. My ideal viewing method would be a tablet, using Netflix.
29. in bed/on couch.... big screen. .. no extra cost
30. TV streaming with no commercials (a la Netflix, Amazon Prime)
31. Viewing on my laptop
32. Cable, no commercials
33. laptop with ability to Chromecast onto TV
34. I'd like to have access to various forms of content whenever and wherever I am (similar to a DVR but can access on phone, other TVs, online etc.)
35. On my iPad because it is mobile
36. tablet and less than \$30/month
37. Through an app on my TV
38. Computer or tablet with a wide screen, a mobile phone is too small to "enjoy" the content

39. The ability to stream commercial free (and subscription) free content
40. Wireless Streaming to television
41. full-sized screen that was sync'd to all of my devices, similar to Apple TV
42. I prefer the choice of screens & I prefer content on-demand. The days of time-slot driven shows are gone in my view. Though sports & news still reign supreme for live content, yet (other than ESPN w/ Sling and a few others), live TV is still bound by cable subscriptions & at a premium cost that I'm unwilling to fork over.
43. television
44. mobile device with unlimited data
45. Streaming with an option to download
46. streaming on sling box as my work requires me to travel often
47. option to watch only one or more commercials at the beginning of the show and then have unlimited content
48. television screen that would give me access to all the shows and movies I want to see at any time I want
49. Television due to size of scree
50. I prefer watching content on my TV, but I prefer subscription services (Netflix, HBOGO, etc.) to cable programming
51. Tablet while on the go, TV with Internet at home.
52. Television via streaming - on demand content.
53. Internet-based with strong and reliable connection capabilities
54. Apple TV connected to my flat screen
55. Large television with a comfortable couch and some popcorn
56. 13" screen (laptop) with live streamed content (like Twitch.tv, for cable shows). No to few commercials.
57. Ignoring feasibility and cost concerns, I would like something like a tablet with a 15" screen that had access to unlimited mobile data, but also that had a very smart docking system that would "screen share" to any TV you bought just by putting the device in some sort of dongle. it's all pretty reasonable technology wise, I just want it at a price point way below what anyone offers, like that whole system maybe \$200 with a \$20 monthly fee. oh and it should always have the ability to connect to Wi-Fi if I don't want to pay for data and/or am out of service coverage.
58. I like to watch TV on Hulu, HBOGO or Netflix on my tablet. I'd be happier dealing with a few adds than paying for my service on a monthly basis.
59. It's simple, I want to pay for the shows I want, and not pay for shows I don't want. When I pay, I want the prices to be less than before. If I pay \$80 for a bundle of 100 channels, that means the channels are worth \$.8 each. I should get a channel for that little. So why can't I? The content isn't worth \$15 for 1 channel yet. Netflix pricing is the best so far, with \$9 a month, and TONS of content. I want it available on all my devices, instantly.
60. mobile to apple TV
61. mobile phone that could be streamed to TV when necessary (i.e. I want to watch with friends)
62. I really enjoy my Amazon Prime/Netflix/Chromecast combo, the only thing that is stopping me from completely cutting the cable is the inability to watch live sports. If I could stream from my mobile devices onto the various TVs in my household and be able to watch live local and international sports, that would be ideal.
63. Streaming without commercials to a TV
64. tablet
65. television
66. Being able to travel with content would be ideal
67. My Blu-Rays on my big TV. For current TV shows, prefer if they stream to my TV in high quality.
68. I would love to be able to watch on my TV ALL seasons of anything I can imagine with the current season for \$40 a month at most. I'd also like reliable Internet so that I could do this.
69. Via a television, I don't like to watch content on other devices.
70. Watching on a TV through a streaming device like Roku incorporating streaming services but also a pay for specific channels cable plan
71. On a television but through a device that streams a service like Netflix (not cable)

72. easy
73. Computer, with no commercials
74. television - but like viewing on the internet, with fewer commercial breaks
75. Tablet
76. watching on my laptop for free without commercials, at any time.
77. Internet video services streamed through a TV
78. Large, high definition TV or monitor with a high definition broadcast
79. Laptop
80. One application, carries over from device to device, allows access to all shows and all movies.  
Have my subscription service based on individual "channels" or production companies and let me pick which ones I want.
81. Stream from phone to computer or TV. watch shows without needing a network subscription.
82. My television, because of size
83. TV on the couch
84. I really enjoy watching content on Hulu and Netflix with my Roku on my TV. Still get the size of the television without the cable bill.
85. Streaming onto a TV
86. Large television with OnDemand, HBO & Netflix to watch my shows, free of commercials during the episodes.
87. My ideal content viewing method would be to have access to all services equally on both my TV and mobile device. This would include pre-recorded programs (as I already do on Apple TV and my iPhone apps) as well as live programming. The latter would ideally be done via cable purchased a la carte (not as an aggregated package).
88. Phone, Tablet streaming cable
89. Ideal is TV, and phone is secondary
90. Ideal TV, not mobile.
91. Television
92. Tablet
93. Any device, any time. I control my live at and add to it whenever I find something I want to watch. Offline mode required.
94. I'd prefer a premium option to remove ads entirely. However I'm not a great use case as my watching has gone down recently. Hulu recently increased the number of commercials and Netflix streaming has removed much content. I've since cancelled both.
95. HD streaming to multiple screens
96. Viewing on a portable large screen (TV or big laptop, not mobile device) with no commercials, in HD, and great sound quality
97. TV
98. Computer
99. big screen
100. Large screen TV with 7.1 surround
101. Netflix is cheap enough that the cost doesn't matter, with no ads and free apps on all my devices, it's the best I've found with a lot of viewing options.

