

MEDIA & ICT CONSUMPTION TRENDS

“TV EXPERIENCE SUPERIOR TO ONLINE VIDEO EXPERIENCE”

The TV landscape is in full transition: viewers are hopping from one device to the other (place-shifting) and compose their individual viewing schedule (time-shifting). Despite the massive availability of mobile devices and online video services including Netflix, YouTube and Popcorn Time TV viewers continue to prefer the regular TV screen. Our research under the iMinds project ‘SHIFT-TV’ reveals that TV remains the preferred viewing medium for 69.2% of the population; only 2.7% prefer online video over TV. TV is said to offer a superior quality and user experience than online video services.

Multiscreen is King, long live TV

Our survey with over 1,100 TV viewers (representative for the online population in Flanders) yields new insights into the popularity of time- shifted and place-shifted viewing in Flanders, and the quality of experience that goes with it. The results confirm the popularity of multi-screen viewing (using multiple viewing screens): 61.4% watches the regular TV screen daily, but laptops (33.8%), smartphones (32.4%) and tablets (28.5%) account for a growing proportion of our TV viewing pattern.

Based on the results, four different viewer types were identified:

- **Multi-Device, On-Demand Mixed / Live Watchers (16.6%)** watch both live TV and on-demand - and through multiple (4 to 5) screens (especially young highly educated);
- **Dedicated Device, On-Demand Watchers (27.5%)** look especially TV-on-demand through a limited number (1 or 2) screens (especially older educated);
- **Dedicated Device, Live Watchers (21.6%)** watch live TV on a limited number (1 or 2) screens (especially older low-skilled);
- **Multi-Device, On-Demand Watchers (34.3%)** watch TV on demand via multiple (3 to 4) units (especially young highly educated).

User experience of crucial importance

The results suggest that user experience is largely affected by screen size: TV viewing scores an average of 4.3 on a five-point scale, significantly higher than the user experience on laptop (3.61), tablet (3.58) and smartphone (3.24). Moreover, the way video signals are sent over the network is crucial to the user experience. Regular TV services (cable, IPTV) are sent with higher quality parameters than online video services in the open Internet. People tend to be frustrated by faltering image (4.14/5) and asynchronous image/sound (3.99/5), but also a digital TV decoder that is not working properly (4.13) evokes a lot of frustration. Work to do for TV service providers if you ask us...

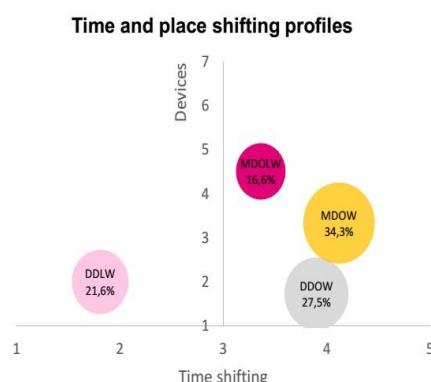
“Multi-screen TV consumption becomes mainstream, but TV largely remains the preferred viewing”

“User experience is affected by screen size and quality of content delivery network”

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FOR MORE INFORMATION

<p>MDOLW Multi Device Mixed On Demand-Live Watchers (watching live and on demand on multiple devices)</p>
<p>DDOW Dedicated Device On Demand Watchers (watching on demand on few devices)</p>
<p>DDLW Dedicated Device Live Watchers (watching live on few devices)</p>
<p>MDOW Multi Device On Demand Watchers (watching on demand on multiple devices)</p>



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MEDIA & ICT CONSUMPTION TRENDS

Media & ICT Consumption Trends is a partnership between iMinds Research Center Media & ICT (iMinds-MICT) and digital research institute iMinds. The project seeks to provide an overview of academic research in Flemish media and internet consumption, and links insights into transforming audiences to the current challenges for the Flemish media industries. It therefore combines results from original user-driven innovation research with conclusions from international studies and technology trends reports.

Series Editors: Tom Evens, Bart Vanhaelewyn and Lieven De Marez

Hungry for more insights? Check out the other issues in this series at <http://www.mict.be>

- (2015-1) **Local content no must-have for Netflix users**
 - (2015-2) **Twitter activity not related with higher TV viewing rates**
 - (2015-3) **Facebook: Why we ignore the privacy alarm**
 - (2015-4) **Wanted: more audio-visual content for libraries**
 - (2015-5) **Provide flexible identity management in popular apps**
 - (2015-6) **Digital learning games should put fun first**
 - (2015-7) **Willingness to pay for news apps remains low**
 - (2015-8) **Tablets in secondary education are not evident**
 - (2015-9) **TV experience superior to online video experience**
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Research Center **Media & ICT (iMinds-MICT)** is affiliated to Ghent University, part of the Flemish digital research center and business incubator iMinds, and forms, together with SMIT and CUO, the research department iMinds-Digital Society. The context and focus of MICT's research is today's digital society and innovation economy, and more specifically the changes and challenges that are imposed by that environment for each of its stakeholders: industry, policy makers and, not the least, end-users.

iMinds is Flanders' digital research center and business incubator, established by the Flemish government in 2004. Building on the expertise of our 850+ top researchers located at 5 Flemish universities, it introduces digital innovation in 6 key markets including Media, ICT and Smart Cities. iMinds collaborates with research partners to convert digital knowhow into real-life products and services that change people's lives for the better. Key asset is an agile, open research mind set and proven methodology.
