



TECHNOLOGY INTELLIGENCE SERVICE

Consumer Research - Devices, Media & Usage - Premium

KEY TOPICS

- Exploring the dynamics between install base and usage
- Importance of picture quality & screen res; 4K & UHD experience
- Content recommendations, navigation and user experience
- Penetration and usage of digital assistants & smart home devices
- Originals, exclusives and boxsets content
- Social video and apps

Track consumer preferences and usage alongside robust analysis of the global connected device landscape.

This service offers bi-annual consumer surveys and analysis on the overlap and interplay between device ownership, media preferences, and consumption in key countries. In addition, this premium service includes full access to our Connected Devices Intelligence Service, providing detailed analysis on the connected devices installed base and the technology ecosystems used for media distribution in 70+ markets.

- The overlap of penetration and usage of different media consumption devices, from smart TVs to digital media adaptors
- Interplay between device ownership and media subscriptions and services
- The relationship between different media service adoption and usage, including online video services and pay-TV packages
- Connected devices use cases and user demographics, including detailed analysis of consumer usage statistics and viewing behavior by device and service
- Analysis of the consumer segment currently not utilizing connected devices and media services, with evaluations of consumer perceptions
- Trend analysis answering why consumers are using their devices as they do, and comparing that with countries at different stages of connected devices and media penetration
- Content and device preferences, incl. perceived value of content recommendations
- Analysis on market competition, company positioning, M&A, technology trends and technology disruption

Contents

Major components

- > Twice annual consumer survey covering 6 key markets, results in visualization tool and reporting
- > “Sponsor a Country” options to add additional markets
- > Subscription to the Connected Devices Intelligence Service, including Connected Devices Database
- > Quarterly reports and insights throughout the year

Metrics and methodology

Consumer Survey with visualization tool and Excel files

Methodology

- 2 waves per year (Q2 and Q4)
- Nationally representative of internet users by age, gender, region and SEG (India national representation of English speakers)
- Statistically significant sample of 2,401 per market per wave

Country Coverage

- US, UK, Germany, Japan, Brazil, India
- “Sponsor a country” option available

Approximately 60 questions, including demographic data

- **Demographics:** age, gender, region, income, working status, occupation, no. of people in household, age groups in household, ethnicity (US only), home status
- **Access and usage of devices and video services:** subscription, AVOD and TVOD

Connected Devices Database

Measures

Connected installed base by country and device for 70+ markets; delivered in TRAX and Excel pivot tables

Devices Covered

- Blu-ray players, connected AVRs, digital media adapters
- FTA set-top boxes, pay STBs, games consoles, smart TVs
- Smartphones, laptops/PCs, tablets
- Soundbars, tablets, wired headphones, wireless headphones, wireless speakers

Device Breakdowns

- **Digital media adapters (DMA):** 4K-capable DMAs, Apple TV, Fire TV, Chromecast, Roku
- **Games consoles:** Nintendo Switch, Nintendo Wii U, PS3, PS4, Xbox One, Xbox 360
- **Smart TVs:** split by brand, covering 98% of total. 4K capable
- **Phones/tablets:** Windows, iOS and Android

Bi-annual consumer survey - Topics explored by customer group

TV & Online Video Providers (Free & Pay)

- > Explore consumer segments to target
- > Which devices to make services available on and support?

Channel groups

- > How changes in TV distribution and consumer behavior will shape the business
- > Addressable base and revenue opportunities

Content Owners/Studios

- > Informing content provision strategy in markets and the move from traditional to digital platforms
- > Understanding willingness to pay for devices and video services

Device Manufacturers

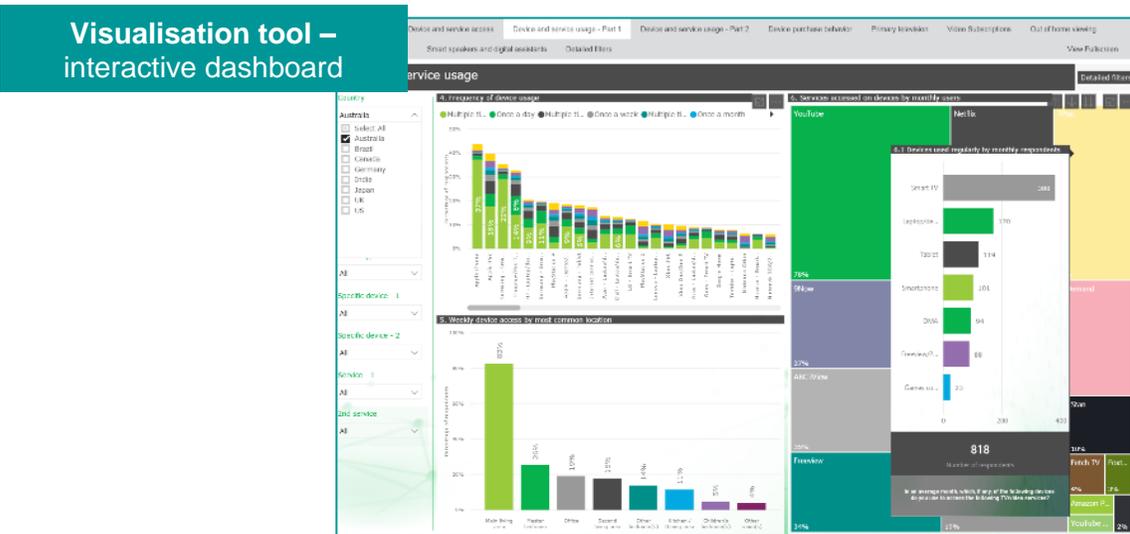
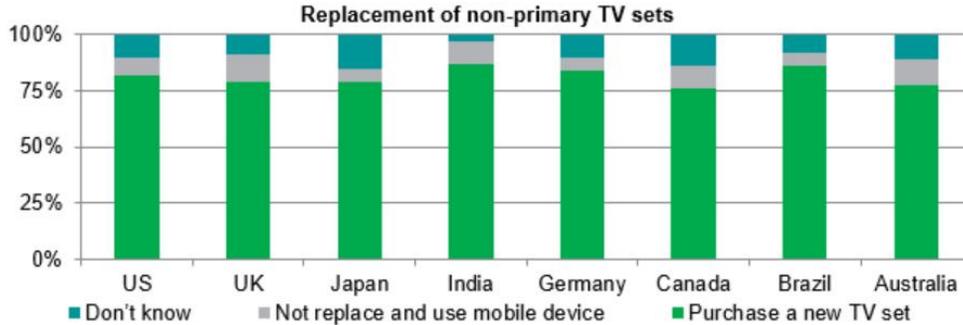
- > How are different devices used for media consumption?
- > Which product features and capabilities are important for consumers?

Technology Groups

- > Identifying business opportunities by customer group
- > Informing investment decisions, e.g. infrastructure to deliver live OTT

Example Table: TV sets are still important in accessing content around the home

- Households with a TV set in their children's bedroom are less likely to replace their secondary TV set with a mobile device are whereas those with a TV set in the master bedroom are more likely to purchase a new TV set.
- Smart TV functionality is key in TV replacement in the next 12 months, however, this changes depending on ownership of other connected devices



Related Research

Connected Devices
 Consumer Platforms & Ecosystems
 Mobile Devices
 TV Sets

Connectivity and IoT Games
 Smart Home
 TV & Online Media

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