A Spotlight Service Complementing the Media & Entertainment Service Area Package

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 habits 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 proliferation of devices is fueling growth in OTT video. Video consumption habits are constantly changing as content becomes more accessible across devices and locations. Consumer surveys are vital in understanding the relationship between device ownership and video viewing behaviours to help inform strategies on increasing audience reach.

David Tett
Principal Analyst
Consumer Research – Devices, Media & Usage Spotlight Service

A Service Complementing the Media & Entertainment Service Area Package

**HOW OMDIA HELPS YOU**

- Determine addressable base across devices and identify key audience groups to target
- Understand competitor and market benchmarking across devices and video services
- Identify threats and opportunities for video viewing
- Aid decisions in device launches and prioritization
- Support commercial partnerships, negotiations and investment decisions
- Examine the growth and importance of different ecosystems and technologies across multiple device segments
- Access granular consumer surveys supported with a comprehensive connected devices database and direct access to expert analysts

**KEY QUESTIONS ADDRESSED**

**VIDEO**

- Which video services are most popular by demographics? What is driving usage and uptake?
- Why are consumers taking multiple video subscription services? What is the impact on pay TV packages and subscriptions?
- What is driving churn in video? How important is original and exclusive content in subscription cycles?

**VIDEO CONSUMPTION BEHAVIOURS**

- Which devices are being used for video consumption and what is driving this usage?
- What is the impact of device availability and partnerships on service uptake, usage and ratings?

**ADDRESSABLE DEVICES**

- How many addressable devices and unique homes can be reached?
- Who are the key players across the landscape of consumer devices? How do their strategies, platforms, technologies differ?
- What is the impact of device ecosystems and partnership in driving uptake and usage of devices and services?

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![Disney+ User Experience Ratings by Device Used (Good & Very Good)](chart)

- Devices used impacts usage rates and perceptions of video service

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Consumer Research – Devices, Media & Usage: Meet the Analysts

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Consumer Research – Devices, Media & Usage: Deliverables

**SURVEYS**  
—Bi-annual—  
Bi-annual surveys covering key markets around the world
Power BI visualization tool for analysis including dedicated dashboards for Gaming and Sports Fans
Downloadable pivot tables

**DATABASES**  
—Bi-Annual—  
Connected Households & Users - scaling survey results to online population
Full access to Addressable Consumer Devices databases, including five-year forecasts of connected devices

**REPORTS**  
—Annual—  
Regular topical reports and presentation on major trends across the consumer devices and media landscape

**ANALYST INSIGHTS**  
—Ongoing—  
Analyst commentary on market shifts and key findings from surveys

**ANALYST ACCESS**  
—Ongoing—  
Direct communication with analysts for prompt responses to urgent and unique questions.
Consumer Surveys

Consumer Survey with Visualization Tool and Excel Files

A consumer-centric product highlighting the dynamics between multi-device clustering & media consumption to ascertain addressable bases

DETAILS

Frequency: Bi-annual

Measures
• 2 waves per year (Q2 and Q4)
• Nationally representative of internet users by age and gender interlocked, as well as region and employment status
• Statistically significant sample for each country
• Online adults aged 18-64

Countries
• US, UK, France, Germany, Japan, Brazil, India & Mexico surveyed twice a year
• “Sponsor a country” option available for additional countries

COVERAGE

Approximately 80 questions, of which majority asked twice a year to allow trend analysis

• Demographic splits: 12 questions to help segment respondents
• Devices adoption and usage: split by 130+ device types/brands
• TV & Online Video uptake and usage: Pay TV, SVOD, TVOD & AVOD services
• Usage of devices & video services: usage of video services by device brand, including preferences, consumer perceptions and service ratings

Visualization Tool: Interactive Dashboard

An interactive data visualization tool to allow clients to easily explore and extract survey results.

The tool allows clients to analyze the relationship between survey questions/charts, with the ability to drill down and filter results for added granularity.

Consumer Research - Devices, Media & Usage Spotlight Service | TB0478
Consumer Surveys: Topics Covered

Approximately 70 questions, including demographic data

- **Demographics**: age, gender, region, developed environments, household income, working status, occupation of chief income earner (SEG), no. of people and age groups in household, ethnicity (US only), home status, living situation

- **Devices**: reach, purchase drivers, feature importance, brand loyalty and ecosystem, usage location, primary TV connections and age. **130+ device types/brands**

- **TV & Online Video**: Subscriptions, uptake drivers, cancellations, packages. **Pay TV, online subscription, free/ad-funded/FAST and transactional video services**

- **Usage of devices & video services**: usage of services by device brand, first choices, driving factors. Impact of device on quality measures, usage and UX ratings

- **Consumer Profiles**: Device profiles (Early adopters, validators, accumulators and mainstream), Gamers, Sports fans

- **Hot topics**:
  - 4K & UHD content and TVs
  - Originals/exclusive content, boxsets,
  - Content recommendations & discovery
  - Digital assistants and smart home
  - Social video & apps
**Consumer Surveys: Visualization Tool**

- **Devices dashboard** – penetration, connections, purchase drivers
- **Usage dashboard** – service access by device, out-of-home video and content discovery

**Services dashboard** – video subscription overlaps and drivers, churn and TVOD
Gaming Visualization Tool

Providing deeper insight into gaming trends

Omdia’s bi-annual consumer surveys will now provide more in-depth insight into the device ownership and usage behaviours of gamers.

Greater games coverage in syndicated surveys:
- Demographic profiles of gamers by device type used (console gamers vs. PC gamers vs. smartphone gamers)
- Device and brand ownership overlap and purchase drivers at brand level
- Identify trends in multi-device usage, including most used device
- Console usage rates, location (inc. primary TV), video access and preferences
- Age of TV and feature importance
- Monthly users of online console networks
- Twitch and Steam usage among categories of gamers

Omdia’s games research can help shape future strategies by:
- Identifying addressable users by devices – unique gamers at total level and by device at brand level
- Supporting distribution roadmaps to ensure content launches are prioritised on relevant devices
- Determining the opportunity for gaming across connected devices and screens
- Examining the future of cloud gaming
- Analysing behavioural trends of consumers to drive a targeted marketing approach
- Highlighting key opportunities in video partnerships on gaming devices

Improved data delivery

• A dedicated interactive data visualization tool to allow gaming clients to easily explore and extract survey results relevant to them.
**Sports Fans Visualization Tool**

Providing deeper insight into sport trends

New Consumer Research survey questions added in April 2022 grant unique insight into the media consumption habits of sports consumers via the latest Omdia Sports Fans Visualization tool.

**In-depth sports coverage by type:**
- Full **demographic** breakdowns of sports fans by sport, sports league within key sports and by interaction type with each sport
- Sports as a **driver** for take up of video services by service and usage rates of said services, including a deep dive on **pay TV** feature, content genre and multi-play usage
- Device usage by brand across all content streaming devices and **digital assistants** as well as a specific focus on usage of the **primary TV set**
- Usage of other media services and features including **gaming**, **music**, **social media/messaging** and **video piracy**

**Guide content strategy by using Omdia’s consumer sports research to:**
- Determine and target key **addressable audiences** and identify potentially under-targeted or under-represented demographic groups
- Identify key **video service overlaps** across paid for, ad-supported and transactional video formats, filtered by content genre of interest
- Derive device usage rankings of sport fans with respect to their video service portfolios
- Prioritise content and marketing **distribution partnerships** based on observed overlaps of media, device and technology interests of engaged consumers

**Improved data delivery**

- A dedicated **interactive data visualization tool** to allow clients to easily explore and extract survey results relevant to them.
Connected Households & Users

Consumer survey results are scaled up to the total online populations to provide clients easy access to their addressable markets and segments. Calculated metrics are also included to best utilize survey results.

**KEY METRICS**
- Online households and population – by fixed broadband and mobile
- Households segmented by video subscriptions and device brands, including overlap analysis
- The number of Pay TV and OTT subscriptions per household
- Monthly users by service and device at brand level, including first choice
- Connected STB on-demand & OTT users by pay TV service, and OTT apps accessed
- Pay TV operators deals with OTT video services
- Devices connected to the main TV
- A breakdown of Cord Cutters, Cord Nevers, Cord Shavers, and households returning to Pay TV
- Churn rates by subscription video service
- Multi-play subscriptions by service provider

**Regions**
- US, UK, France, Germany, Japan, Brazil, India, Mexico

**Deliverables**
- Excel pivot tables

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**UK: Netflix Users on pay TV STBs**

![Chart showing Netflix users on pay TV STBs](chart)

**Source:** Omdia 2022

**SVOD services per HH**

![Bar chart showing SVOD services per household](chart)

**Source:** Omdia 2022
Market Data

**Connected Devices Forecast**

Worldwide, regional and country level installed base forecasts for the key consumer devices, examining the devices based on the supported platforms and technologies.

**DETAILS**

- **Frequency:** Quarterly (annual data updated quarterly)
- **Measures:** Connected Installed base

**COVERAGE**

- **Device segments:**
  - Smartphones, tablets, connected TVs, STBs, media streamers, game consoles, PCs, VR headsets

- **Platform level splits:** Platform split for each device segment
  - Android, iOS and Windows for smartphones, tablets and PCs
  - OS splits for Smart TVs, e.g. Tizen, Android, WebOS
  - Media streamers by Apple TV, Fire TV, Chromecast and Roku
  - Games consoles – Nintendo Switch, Nintendo Wii U, PS3, PS4, Xbox One, Xbox 360

- **4K Devices:** Total 4K devices by segment and country, including 4K capable TVs

**Regional & Country level data:**
- 75+ countries globally, across six regions
  - Worldwide
  - North America - US, Canada
  - Europe – UK, Germany, Spain...
  - Latin America – Brazil, Mexico, Argentina...
  - Middle East & Africa – Saudi Arabia, Egypt, South Africa...
  - Asia and Oceania – China, South Korea, Japan, Indonesia...

**Deliverables:** Delivered in TRAX and Excel pivot tables

The Connected Devices database aggregates data from numerous intelligence services and analysts globally.
Reports

Topical Reports and Insight

Regular reports covering consumer trends on connected devices and media consumption. Examples of recent report titles

Topical Reports
- Consumers & Movie Windows, US
- AVOD Consumption Behaviours
- Apple TV+: Users and Device Ecosystem Analysis
- Connected Smart TV Viewing Report, US
- Music Streaming Service Users
- Disney+ Early Adopters
- US OTT Video Consumers: Hispanic & Latinx Audiences
- Amazon Prime Video: Churn Case Study
- Country profiles: Online Video Trends and Consumer Insight
- Connected Devices Market Monitor

Analyst Insights
- US game console owners are ditching pay TV
- TikTok taps further into explosive connected TV segment
- Transactional Video: Consumer Insight, Key Trends and Strategies
- Sky’s pact with Amazon signals major shift in strategy
- The resurgence of PC and tablet usage in lockdown
- Disney+ is the UK’s third largest online video subscription service
- Bouygues Telecom breaks free from set-top boxes with Smart TV app

Media & Technology Digest

The Media and Technology Digest, curated by our analyst teams, presents the best of our monthly research and analysis of the evolving media and technology industries, presenting unrivalled scope and depth of analysis into the key trends, industry evolution and future technologies that will shape the industry in the years ahead.

Example analysis titles:
- New entrants shake up crowded DTC market
- US cord-cutting accelerates due to COVID-19 pandemic
- 2019: The year 5G went commercial
- Dual-display and foldables face many challenges
- Cinema after the Paramount Decrees
Option to Add a Country to the Syndicated Surveys

Omdia offers the opportunity to add one or more countries to the syndicated survey of the Consumer Research – Devices Media & Usage Spotlight Service on either a one-time or repeat basis.

This option allows to gain a quick view or snapshot of a country in order to assess market dynamics. The same survey is run across all countries, providing comparable datasets and the ability to conduct trend analysis.

Timelines
New countries to be added must be finalized at least 6 weeks before survey launch (April & November) for English speaking markets and 8 weeks for translated markets.

Pricing
Dependent on country; estimated range $15-20K per survey wave

Questionnaire
Approximately 70 questions, of which majority asked twice a year
- Demographic splits: 12 questions to help segment respondents
- Devices adoption and usage: split by 130+ device types/ brands
- TV & Online Video uptake and usage: pay TV, SVOD, TVOD & AVOD services
- Usage of devices & video services: usage of video services by device brand, including preferences, consumer perceptions and service ratings

Omnia also offers the opportunity to create bespoke consumer surveys tailored to clients’ needs. Survey results are analyzed by industry experts with strategic recommendations provided.

Uniform Data Access

Ability to access the survey data for added countries alongside other countries surveyed on an ongoing basis across all data deliverables:
- An interactive data visualization tool to allow clients to easily explore and extract survey results. The tool allows clients to analyze the relationship between questions.
- Excel Pivot tables with access to raw data for all survey questions with filters
- The Connected households & users database which scales up survey results to the total online populations. This provides clients easy access to their addressable markets and segments. Calculated metrics are also included.

Consumer Surveys: Sponsor a Country Option
About Omdia’s Media & Entertainment Research

Omdia’s Media & Entertainment portfolio provides forecasts, consumer survey data, competitive analysis and qualitative insights about the world’s largest, fastest-growing and dynamic markets. The team’s coverage provides a joined-up view of unrivalled depth and breadth across the sector’s most important geographies, technologies and companies.

Clients receive access to a team of over 35 analysts, each with specialized expertise and organized to address critical intersections in the rapidly converging media and entertainment market. The team is supported by an array of Omdia colleagues specializing in adjacent domains, such as mobile, broadband, devices, cloud, digital consumer services and media delivery.
Related Content: Digital Consumer Services Service Area Coverage

About Omdia’s Digital Consumer Services Research

Omdia provides expert analysis and data across Digital Consumer Services with unique coverage of service providers’, over the top players’, and major tech platforms’ activity in this space. We can help identify which markets and offerings are driving growth in Digital Consumer Services, understand the strategies of key competitors and customers, and assess the impact of this rapidly evolving market across different businesses.

Our global team of analysts provides expertise on service provider and tech company strategy across Digital Consumer services including: broadband and bundling, messaging and communications, consumer platform strategies, digital operator services, app ecosystems, payments and commerce, smart home, and consumer AI.
Related Content: Media Delivery Service Area Coverage

About Omdia’s Media Delivery Research

Omdia’s Media Delivery research provides timely and actionable insight for businesses looking to understand this increasingly complex market. The market is segmented into STBs, Home Networking and Video Technology, and each is examined in detail using qualitative and quantitative research and analysis.

Omdia’s Media Delivery research is created and maintained by experts in the media delivery field, but analysis also builds upon data and expertise from the larger Omdia team, including within media & entertainment, cybersecurity, enterprise IT, IoT, components & devices, service provider technologies, and smart home.
About Omdia’s Consumer Electronics & Display Application Research

World-class coverage of the consumer electronics industry, this research is led by analysts who come from the industry and have extensive experience from supply chain to market verticals.

This research services allows accessibility to Omdia expertise covering TVs, smartphones, mobile PC, smart home, home appliance and professional AV products.

With in-depth coverage of shipments, prices, install base, market opportunities, regional trends, companies and new technologies, our research coverage covers all important analysis incorporating context and industry implications.
Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

**Draw on our expertise**

- Make the right decisions
- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:

- **Tom Coate**
  Customer Success Manager

- **Kären Dyer**
  Customer Success Manager

96% of our customers rate our service as Excellent or Very Good.
ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today’s constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.