

ROCK BOX

MAKE SOME NOISE

STUDENT STREAMING SURVEY
FEB 2021

ABOUT US



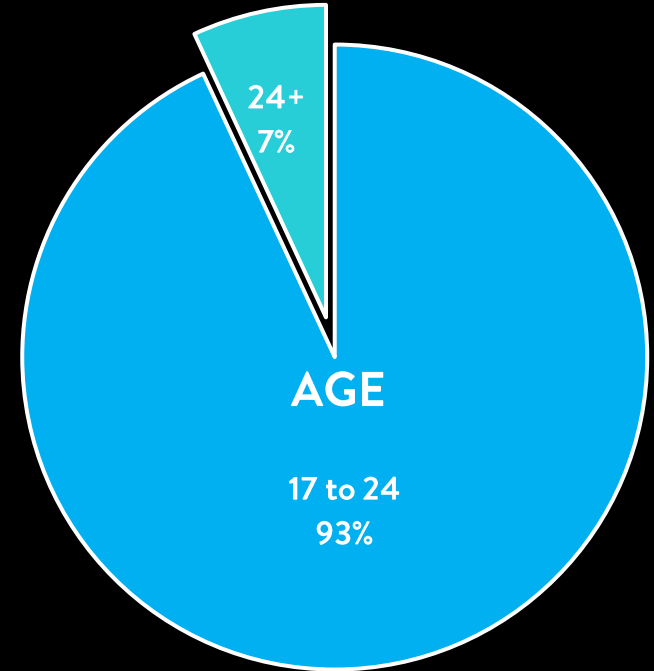
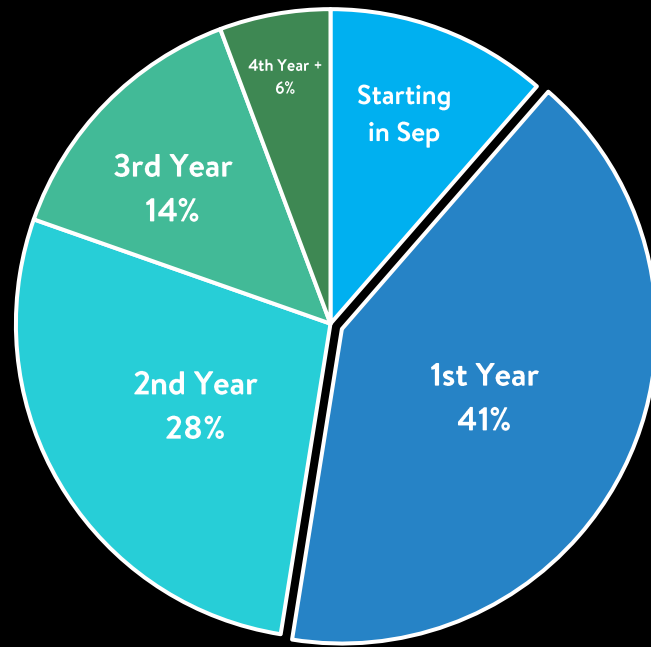
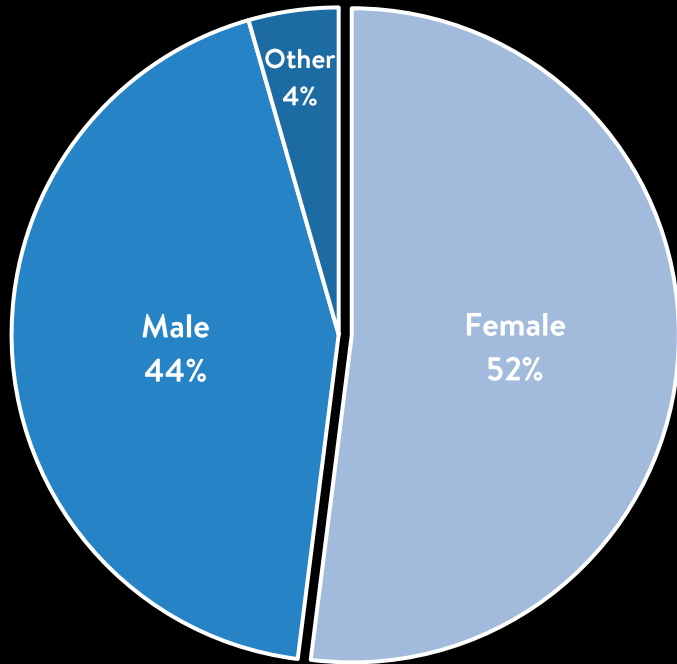
RockBox is a leading Out-of-Home media owner, with a network of digital and paper sites in prime student locations and music venues. We reach over 2 million students, half a million gig-goers, and over 30 million impacts nationally every fortnight.

Our site owners are not landlords, they are our partners. We are dedicated to supporting our networks, and put 50% of our profits back in to live music venues and universities students' unions, while sponsoring live music through our UPP unsigned music project and the Music Venue Trust.



**ROCK
BOX**

VOD Student Research



DEMOGRAPHICS

RockBox Student Streaming Survey Feb 2021. Respondents when data collected: 1582

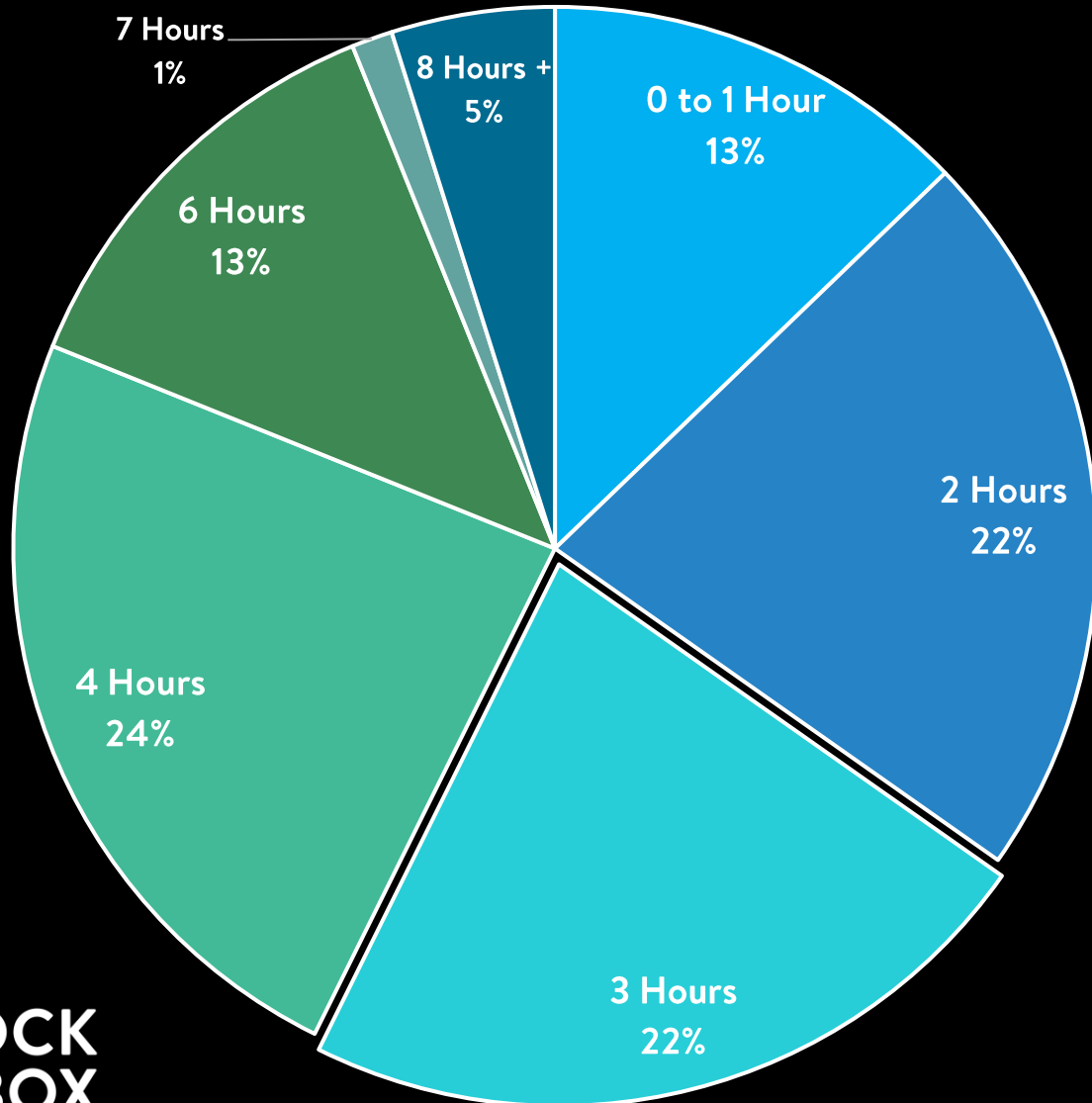
Survey delivered through social media and University direct Email with a voucher prize as incentive.



VOD Student Research

Q, How many hours on average per day do you watch TV streaming? Be honest now, apply to lockdown. 🤪🤪🤪

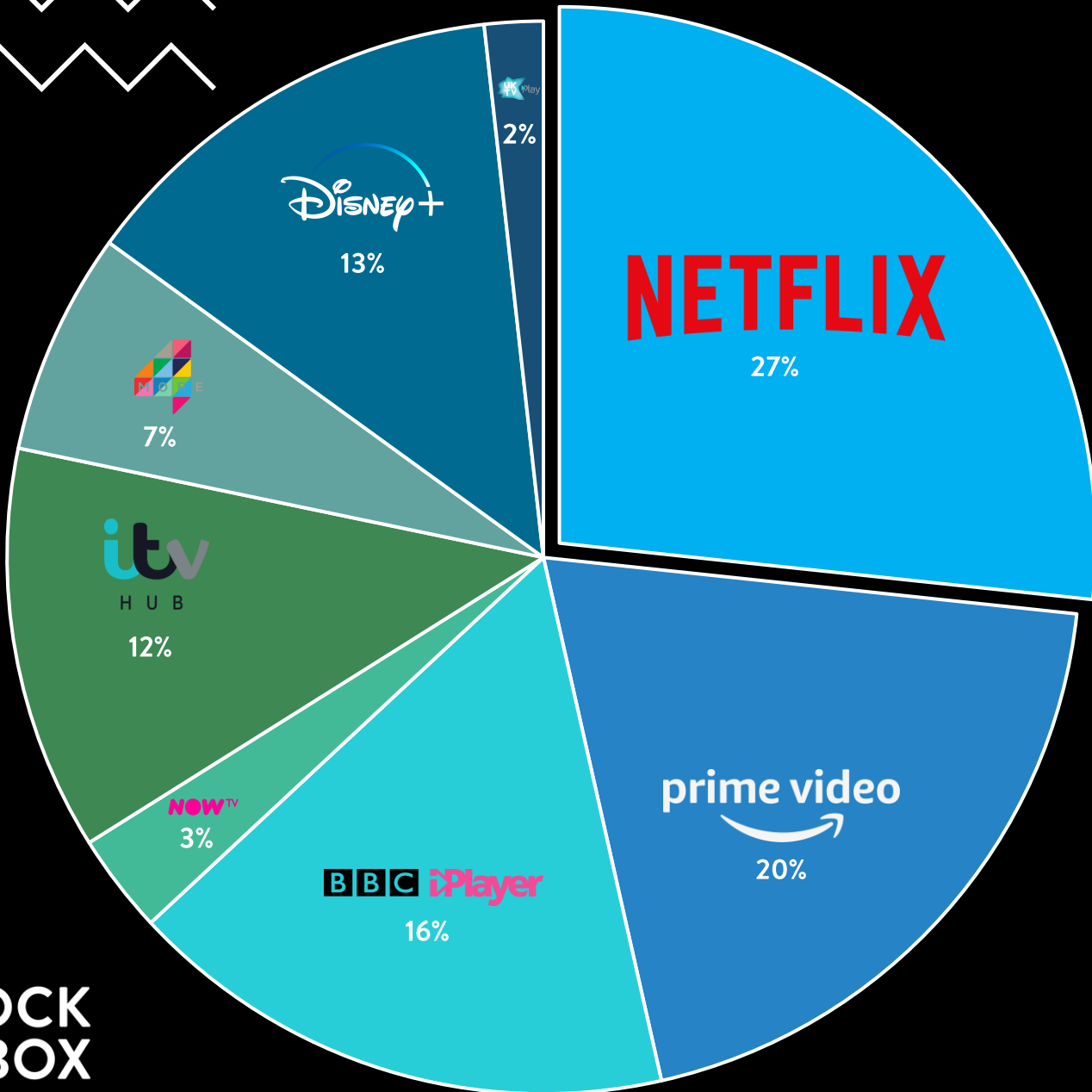
Students spend a lot of time consuming VOD. 3 to 6 hours per day seems to be the norm with 65% watching over 3 hours per day.



VOD Student Research

Q, Which of the following streaming TV services do you use more than once per month or currently have a paid membership for? Only count in your own home/ accommodation, not watching in a pub or at a friend's. 📺 📱 🖥️

Netflix and Amazon are firm favourites on campus as expected. Disney+ is rapidly growing. Now TV appears to lag some way behind. UKTV Play has a minimal score on campus. Freeview Explore has been excluded from the graph as it scored under 1%



The norm, Netflix and Amazon are dominant and loyalty is high

Age 17 to 24

Average daily viewing hours: 3

Occasional streaming snack



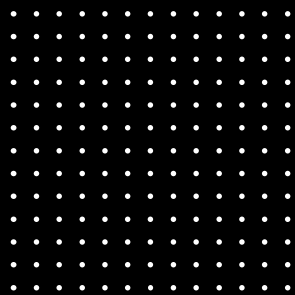
- Paid VOD apps watched most frequently: **prime video** **NETFLIX**
- If she could only ever watch one again: **NETFLIX**
- Which has best content currently: **NETFLIX**
- Which need new content to keep you: **prime video**
- Best value for money: **NETFLIX**
- Worst value for Money: **BT SPORT**
- **Pays for Netflix and has never cancelled**
- A new film or series is most likely to get her to try a new app

Student Voices

Lindsay
1st Year Strathclyde Uni

An out and out Netflix fan with no complaints.

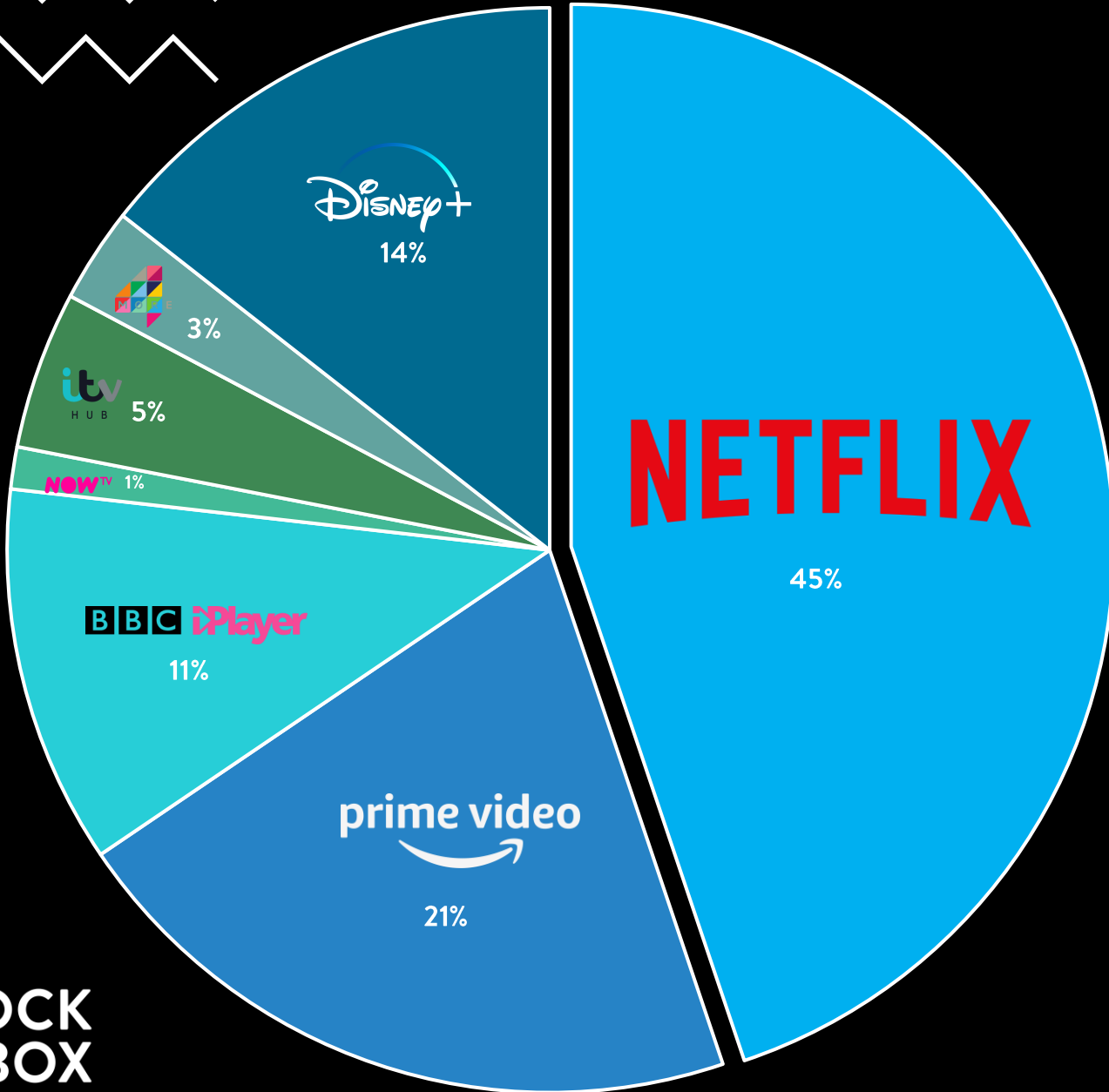
Has never watched Now TV



VOD Student Research

Q, Which do you watch the most of? 

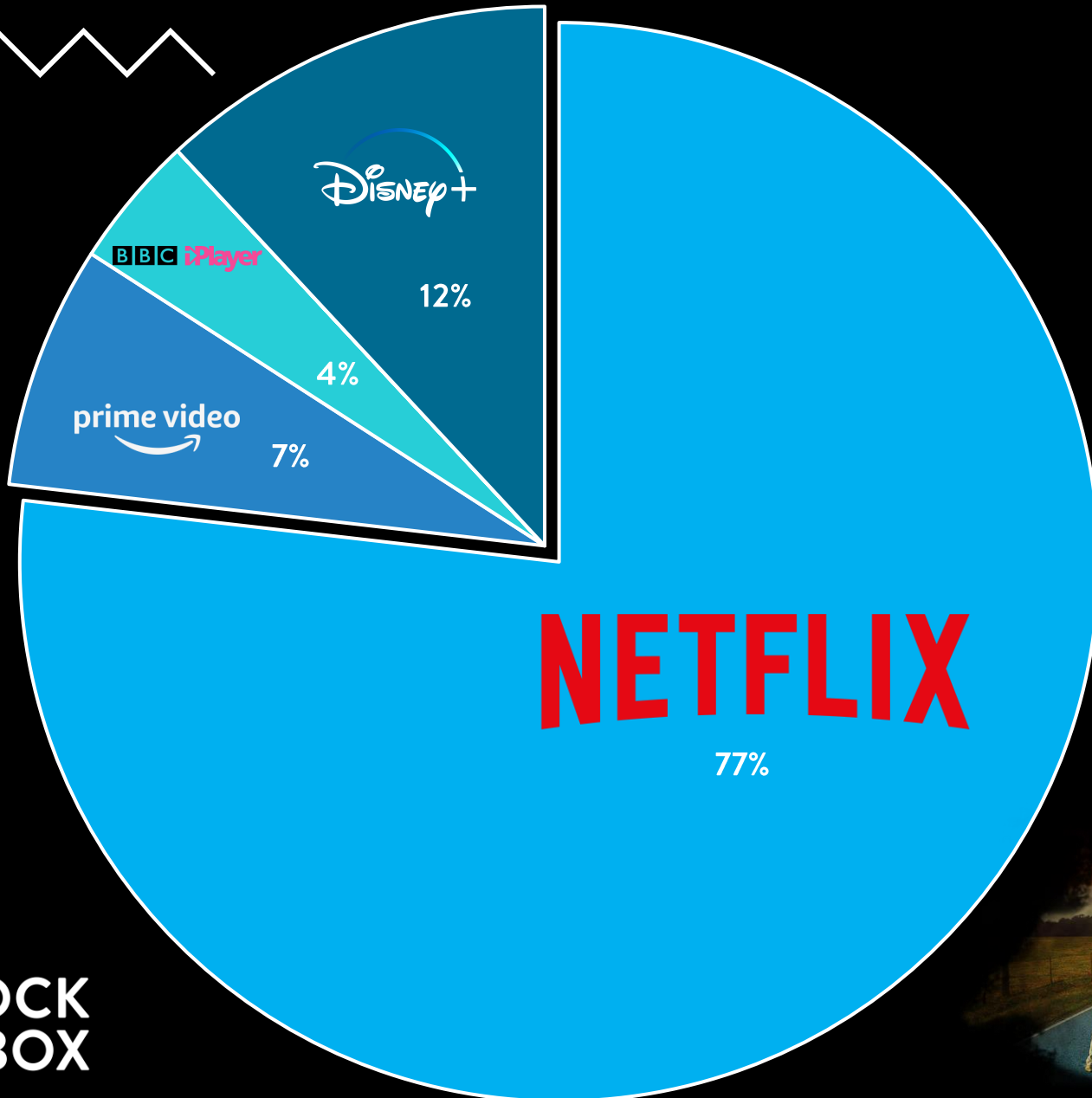
The paid apps dominate on this excluding Now TV. BBC iPlayer holds its own in this category and stands out from the other free apps. This may largely in part be down to iPlayer's frequency with on campus and other media keeping students up to date with new releases



VOD Student Research

Q, If you could only ever use one again which would it be? 🍷

There's not a lot of competition on this question. Interestingly Disney+ scores 2nd to Netflix, suggesting it is cutting into Amazon's market share with students.

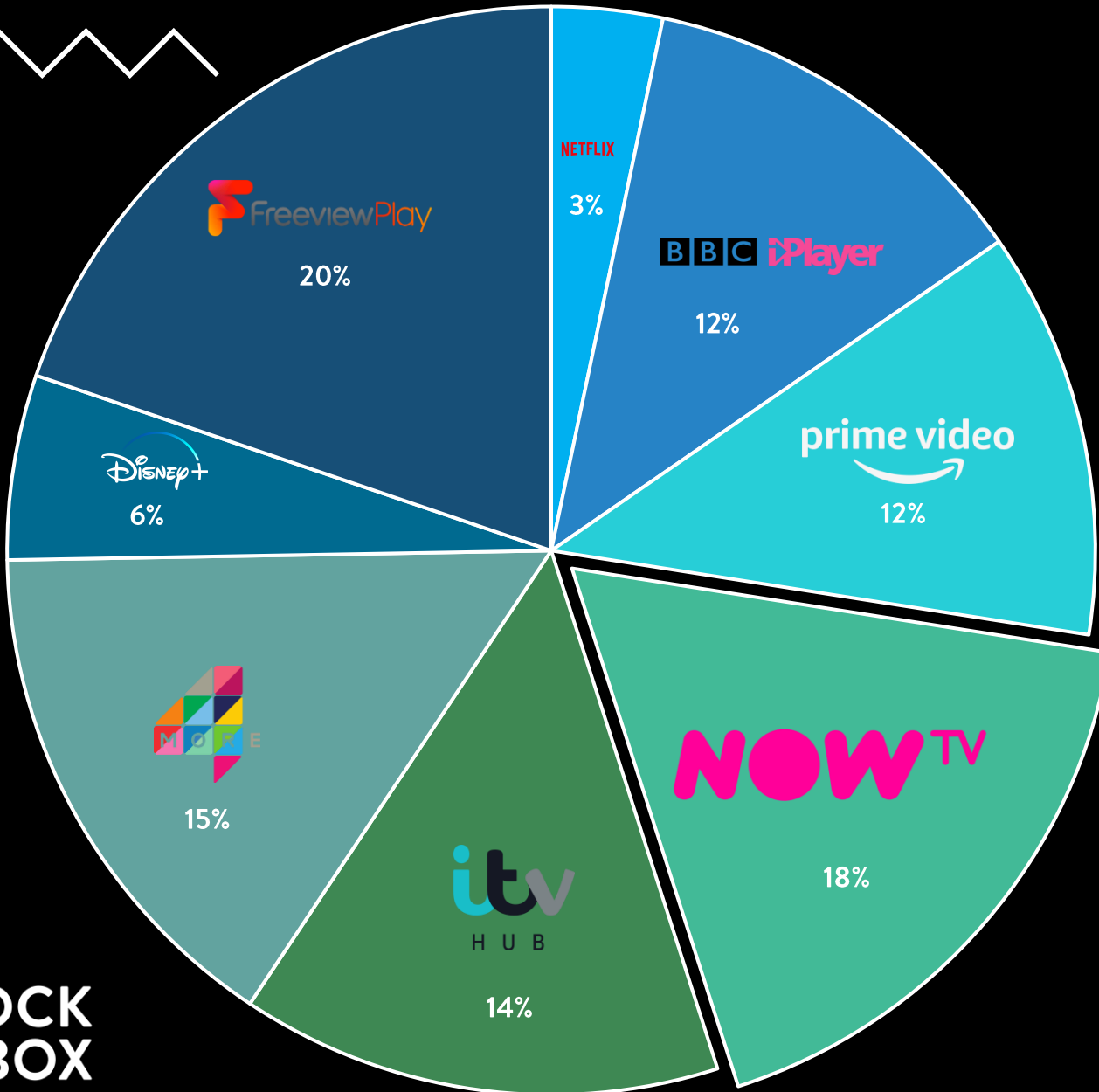


VOD Student Research

Q, Do you dislike any of these? 😞

A very subjective question, but it's worth noting that, other than Now TV, paid subscription models are generally disliked less than free to view platforms

Again a lot of love for Netflix and we see Disney+ growing in favour over Amazon which seems to be like marmite with students



The exception scoring highly for Now TV

Age 17 to 24

Average daily viewing hours: 2

Go to streaming snack



- Paid VOD apps watched most frequently: **NOW TV** Disney+ **NETFLIX**
- If she could only ever watch one again: Disney+
- Which has best content currently: **NOW TV**
- Which need new content to keep you: **prime video** **NETFLIX**
- Best value for money: Disney+
- Worst value for Money: **NETFLIX**
- **She sticks with monthly contracts and is not an account hopper**
- A new series is most likely to get her to try a new app

Student Voices

Gemma
1st Year Chester Uni

“Now TV could personalise my content more to my interests”

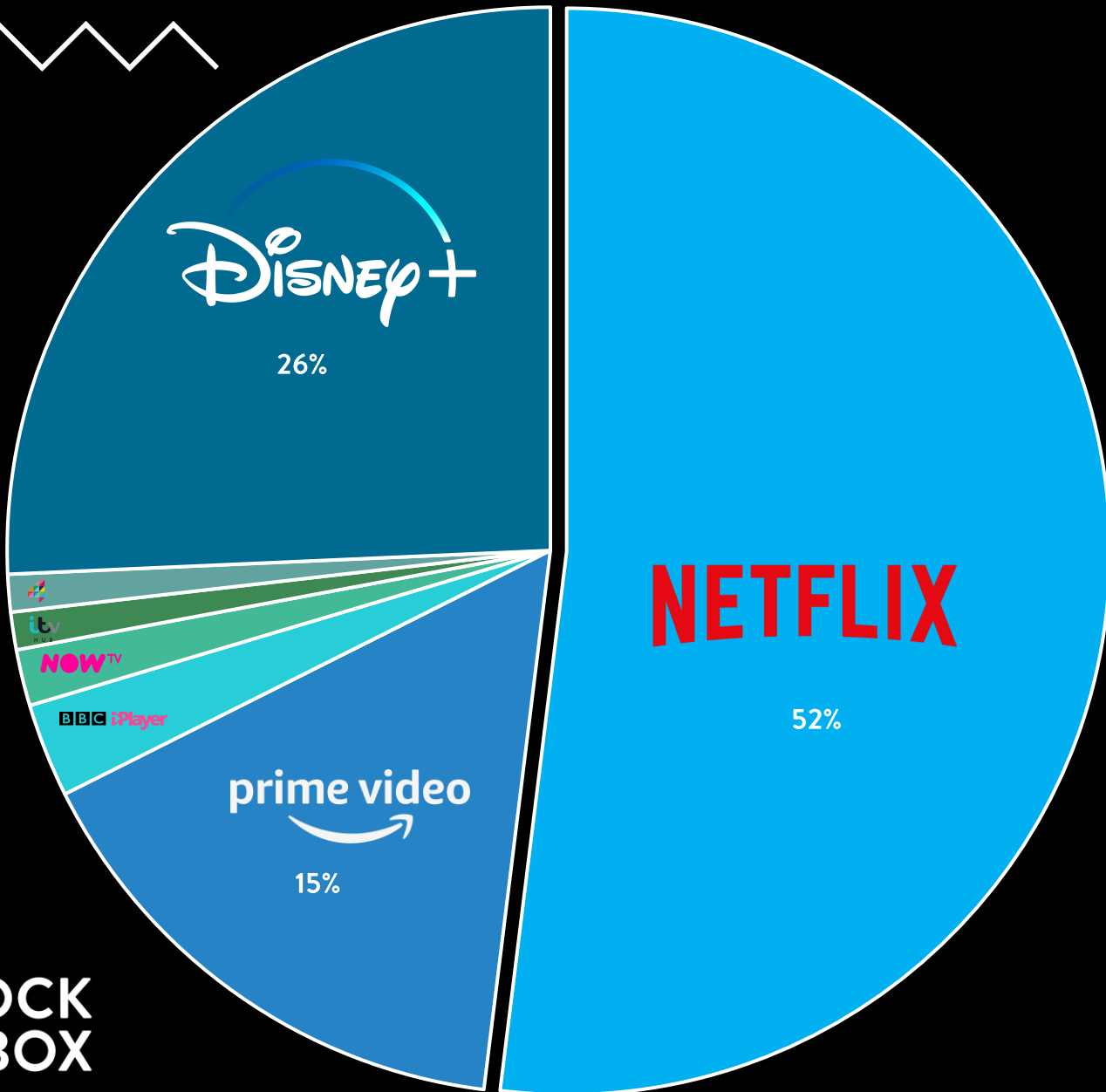


VOD Student Research

Q, Which has the best content currently?



(Asked Feb 2021)

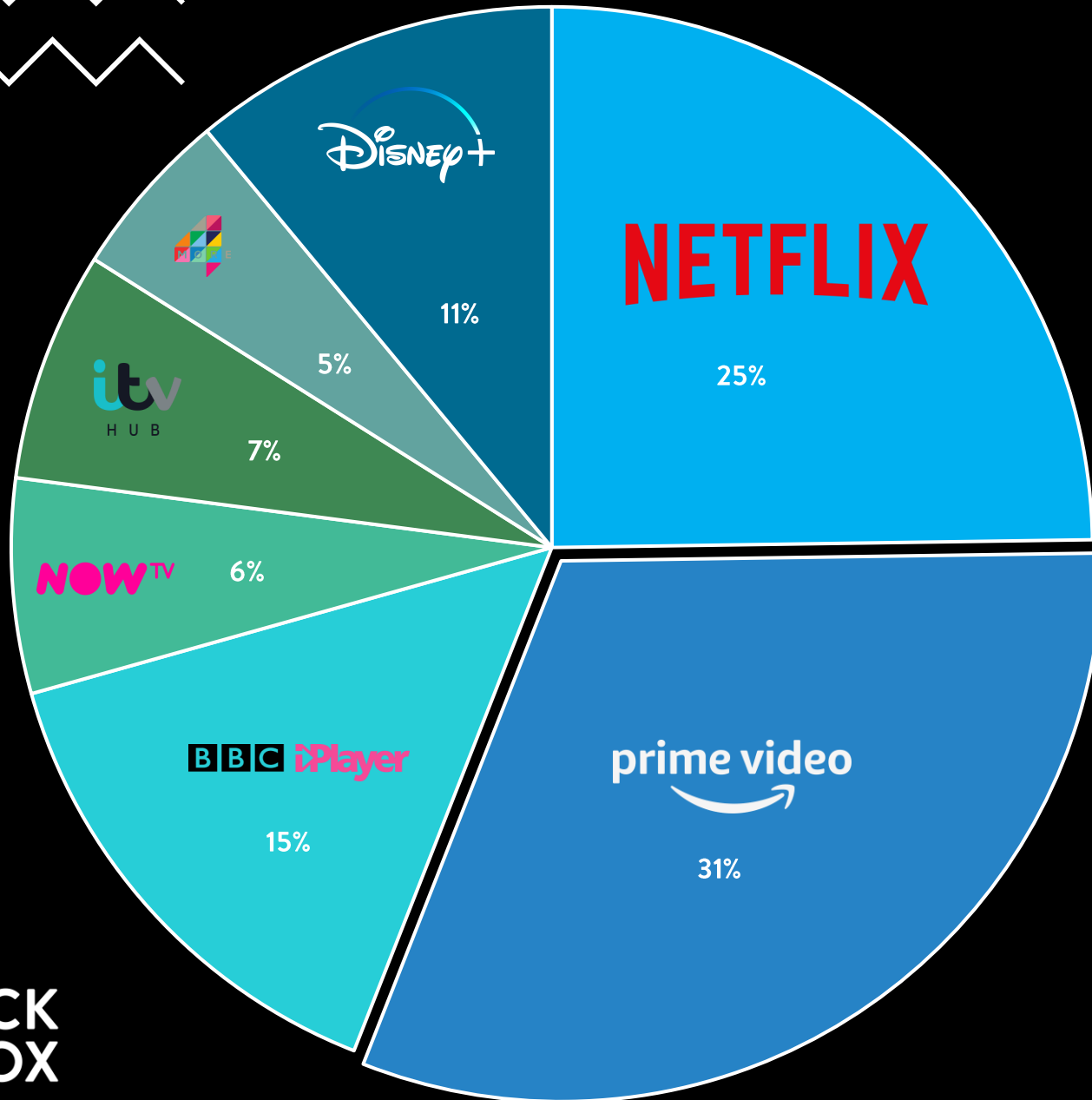


VOD Student Research

Q, Which have been good but need new content to get you interested again??

A low percentage here is not always a bad thing, but may also indicate indifference.

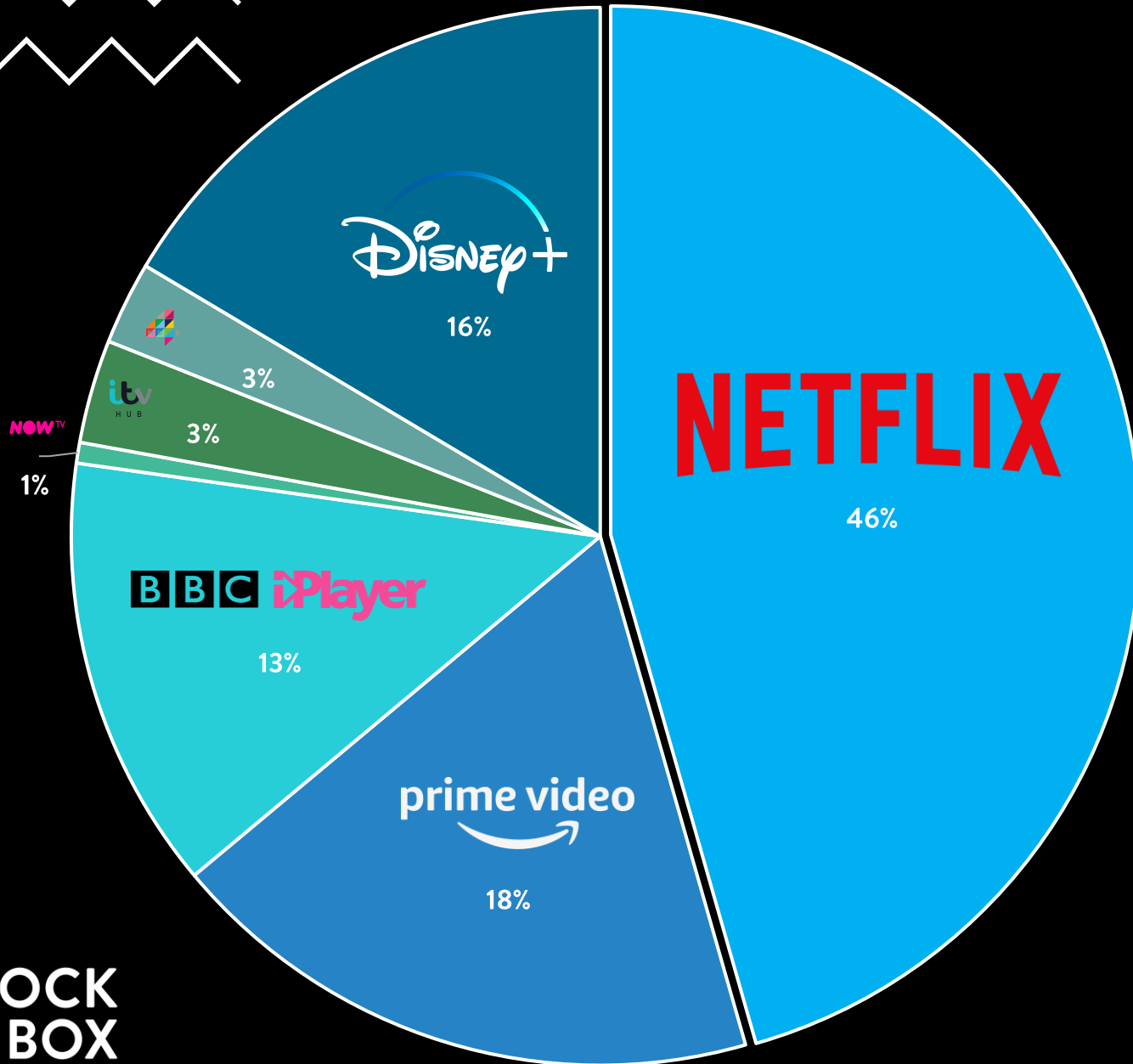
Netflix, Amazon and BBC iPlayer stand out as brands that would benefit from new content campaigns.



VOD Student Research

Q, Which do you think is the best value for money? If it's free then base value on time taken up by ads versus paying for it. 🙅

BBC iPlayer has carved out a perception of value along with the leading subscription services.






Example of a student willing to pay extra for perceived value

Age 17 to 24


Average daily viewing hours: 3


Occasional streaming snack




• Paid VOD apps watched most frequently:   

• If he could only ever watch one again: 

• Which has best content currently: 

• Which need new content to keep you: 

• Best value for money: 

• Worst value for Money: 

• **Does not pay for his Netflix account himself but pays for his BT Sport account**

• A new film or series is most likely to get him try a new app

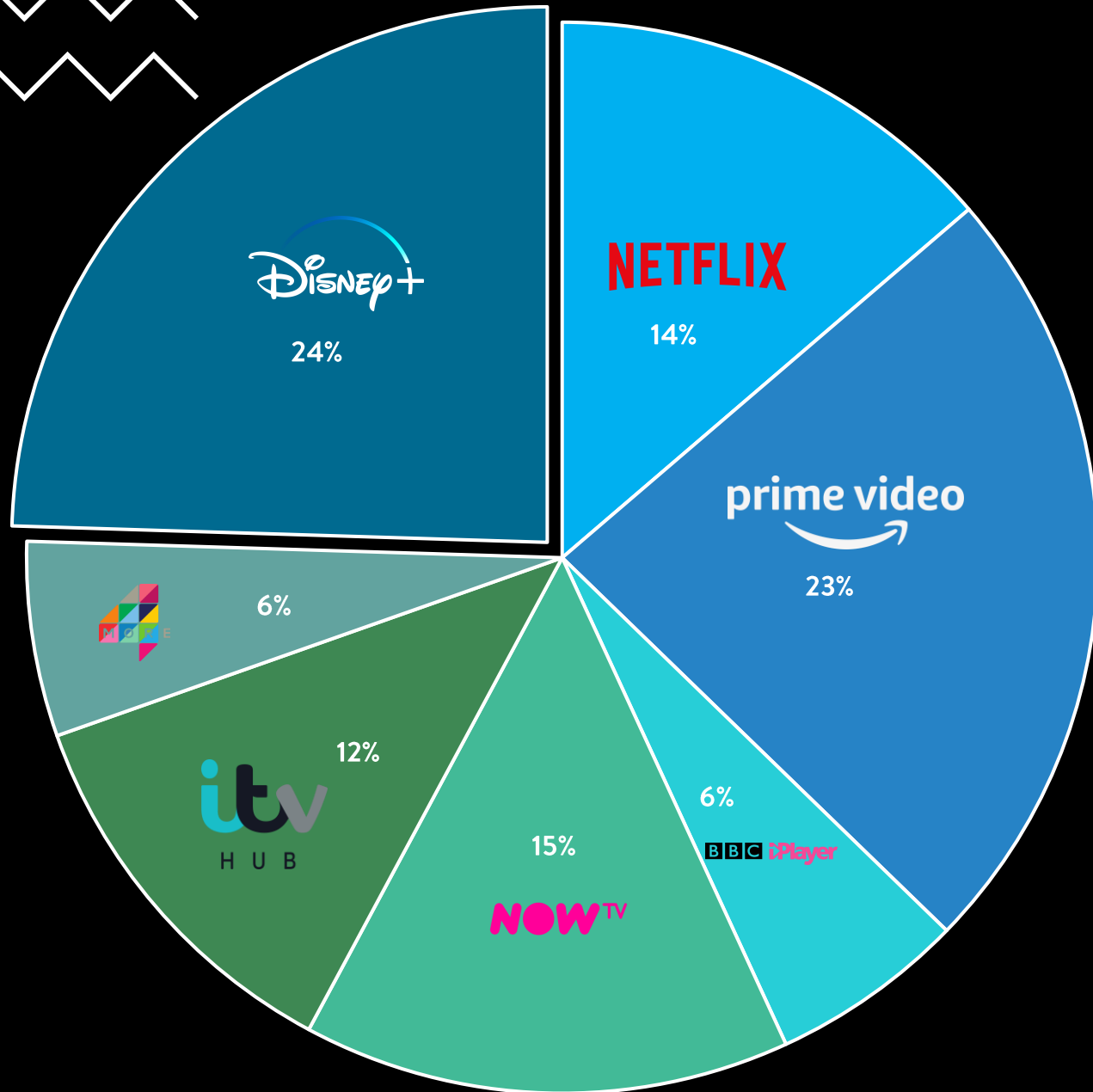
Student Voices


Elliot
2nd Year Royal Holloway Uni

“Now TV should have a student offer like Amazon Prime do”



VOD Student Research



Q, Which do you think is the **worst** value for money? If it's free then base value on time taken up by ads versus paying for it. 

Despite its popularity on other charts, it's clear that those who do not have Disney+ do not see it as good value. Interestingly ITV also has low value perception.



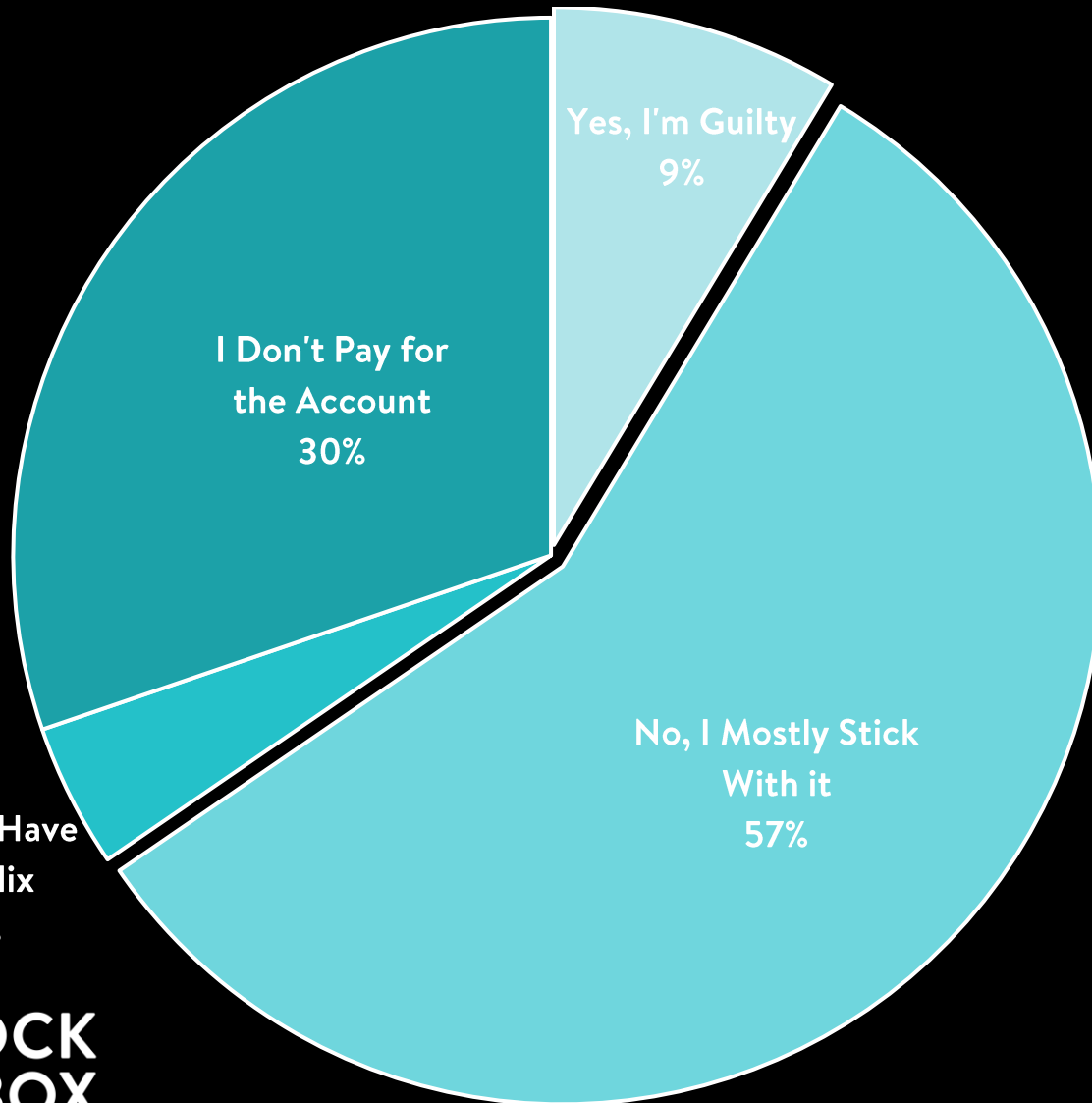
VOD Student Research

NETFLIX

Q, Are you a Netflix hopper? Meaning do you subscribe and unsubscribe depending on if there's something you want to watch?



Netflix has great customer retention on campus. However, it clearly has an issue with 30% of it's customers not yet moving to their own paid subscription.





Student Feedback Sample

Do you have advice for
any of the above
streaming brands on
how they could get you
to use their service more
or subscribe?

ITV hub, All4 and UKTVPlay all have such long ads that it's not worth watching them most of the time

Netflix - update original series more often, not having to wait a year for new seasons of popular tv shows

Now TV needs to increase quality of streaming. It has long buffer times and pixel quality!

Student offers (eg Amazon prime student is a really good deal)

Any brand that doesn't offer a student discount should maybe look into offering them depending on their viewers

More personalised content

Netflix needs to stop taking good shows and movies off!!! 😞🙄

Any of them could do holiday promotions

Disney + could give a longer trial period like amazon prime does for students

**Add more world
cinema!**

Please create content in regional languages also

Student discount!!

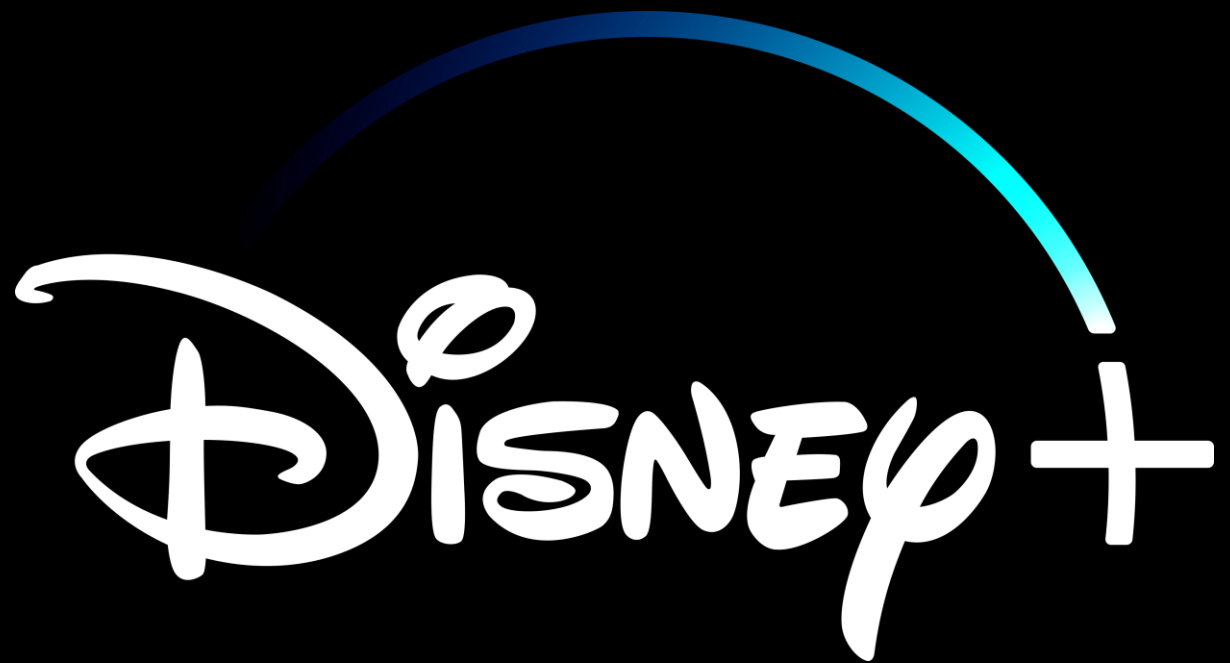
Any brand that doesn't offer a student discount should maybe look into offering them depending on their viewers

Sky TV - value for money. The subscription is not worth what's available on the app.

**Stop removing shows halfway
through when I'm watching a
season**

Don't have additional costs within a subscription





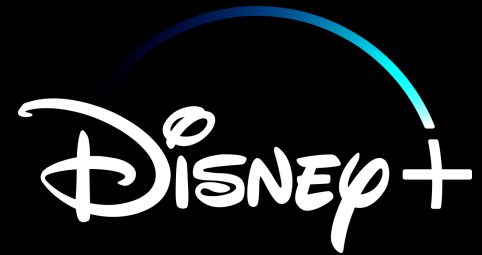
A CLOSER LOOK



ROCK
BOX

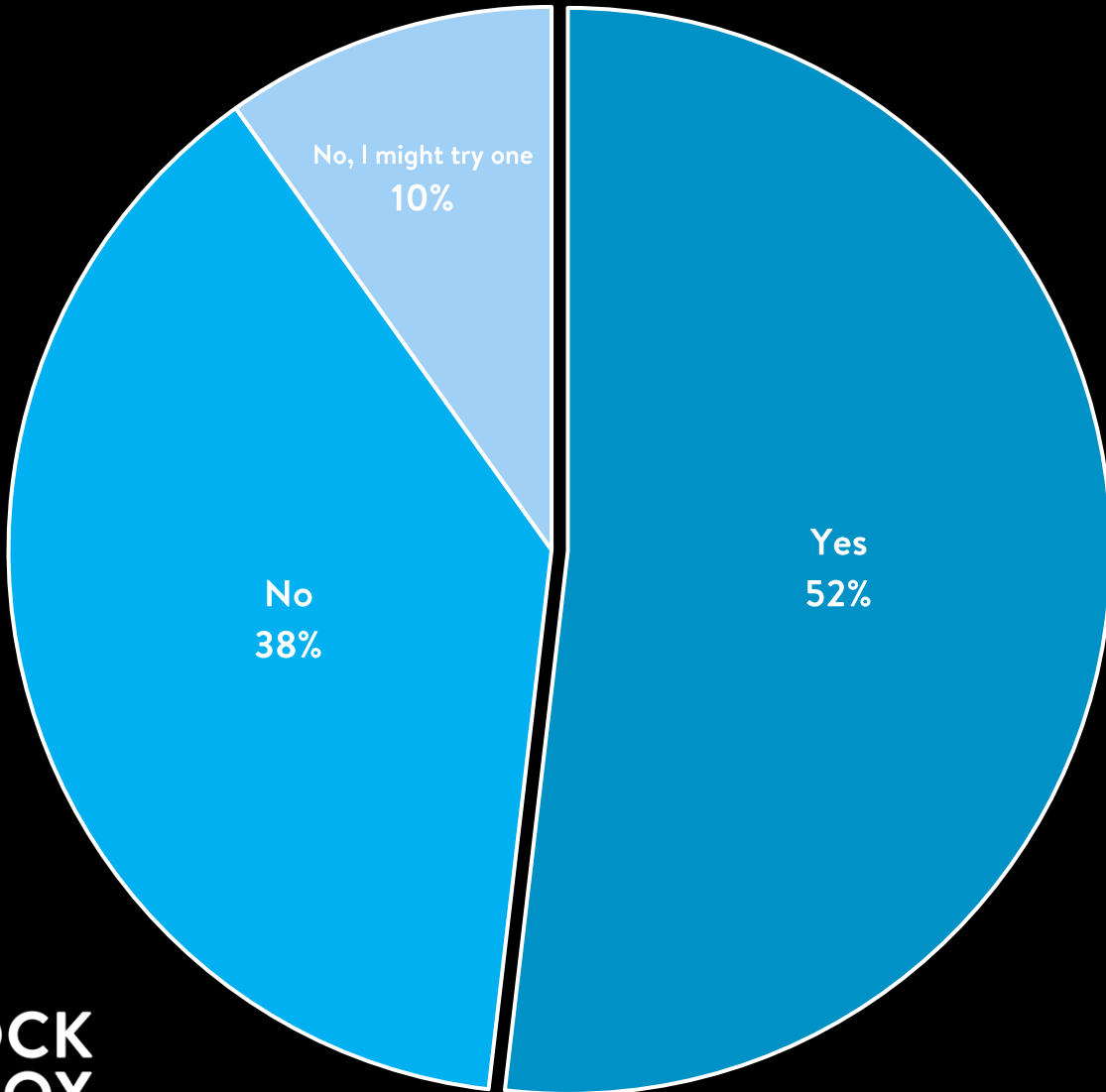


VOD Student Research



Q, Do you have a Disney+ Account?

Just over half of our respondents have Disney+, 38% are an untapped market given its popularity with existing student customers

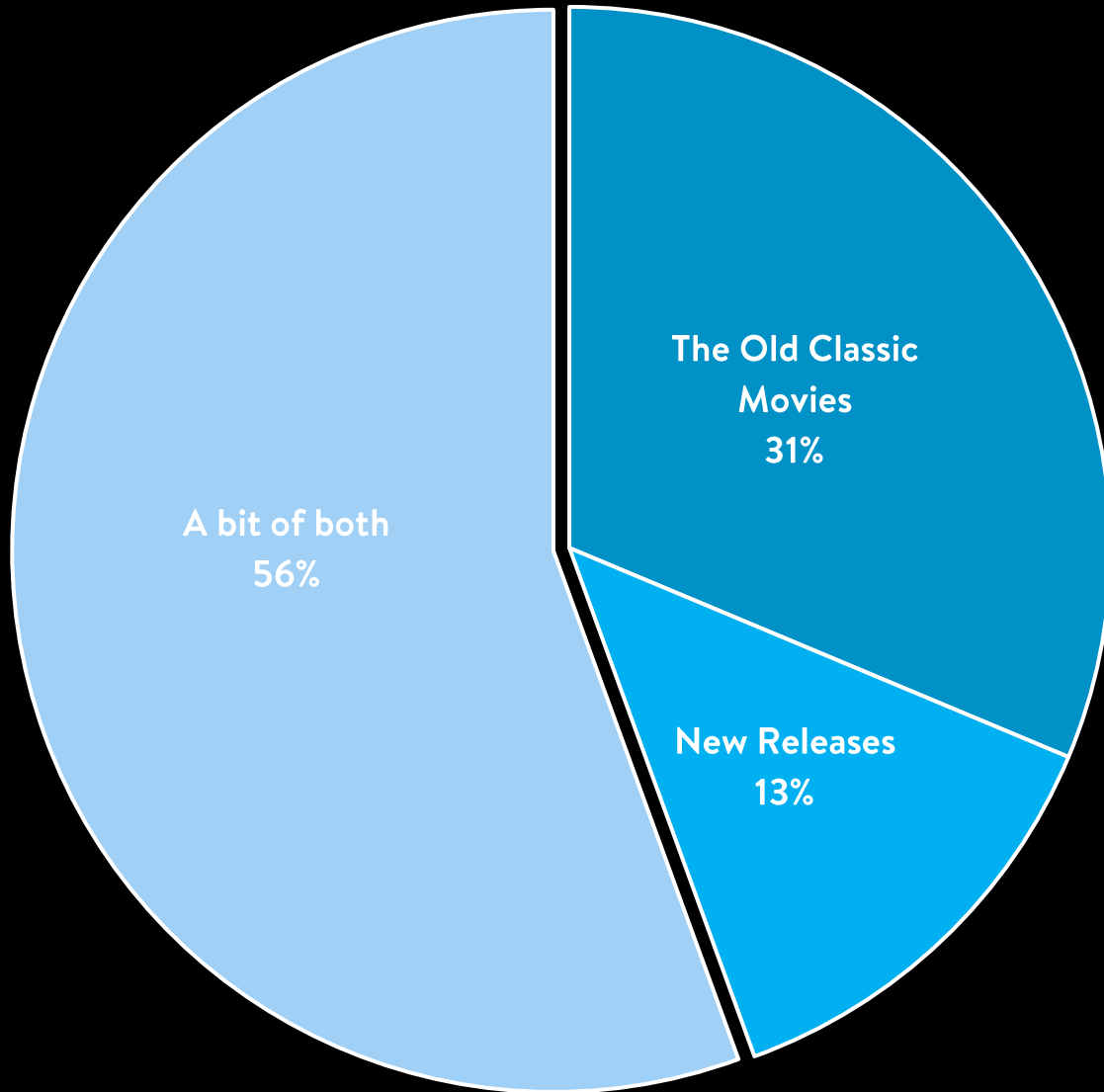


VOD Student Research



Q, *If you watch Disney+, what do you like about it?*

Students appear to like the variety available on Disney+

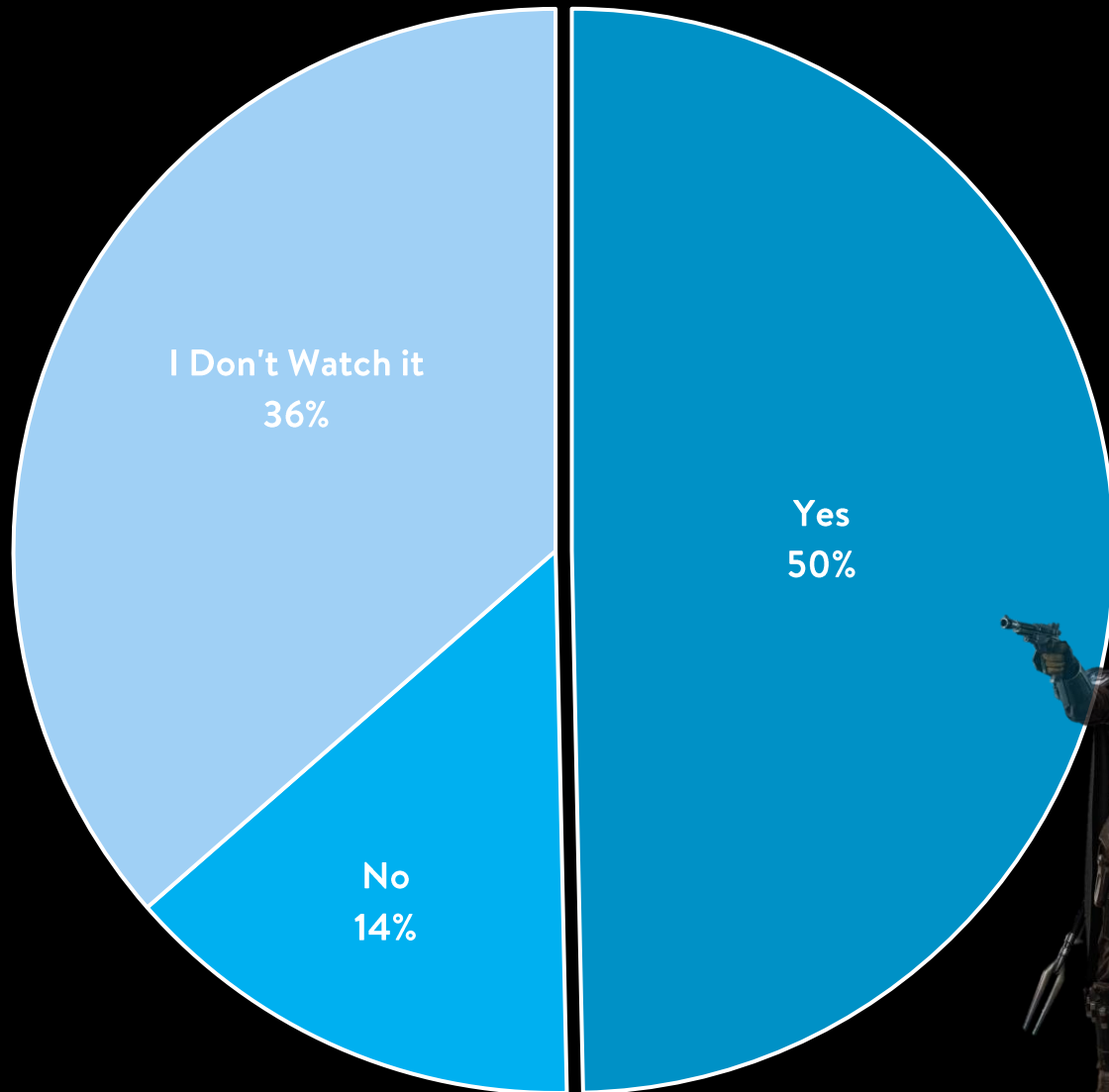


VOD Student Research



Q, If you watch Disney+, do you think it's value for money?

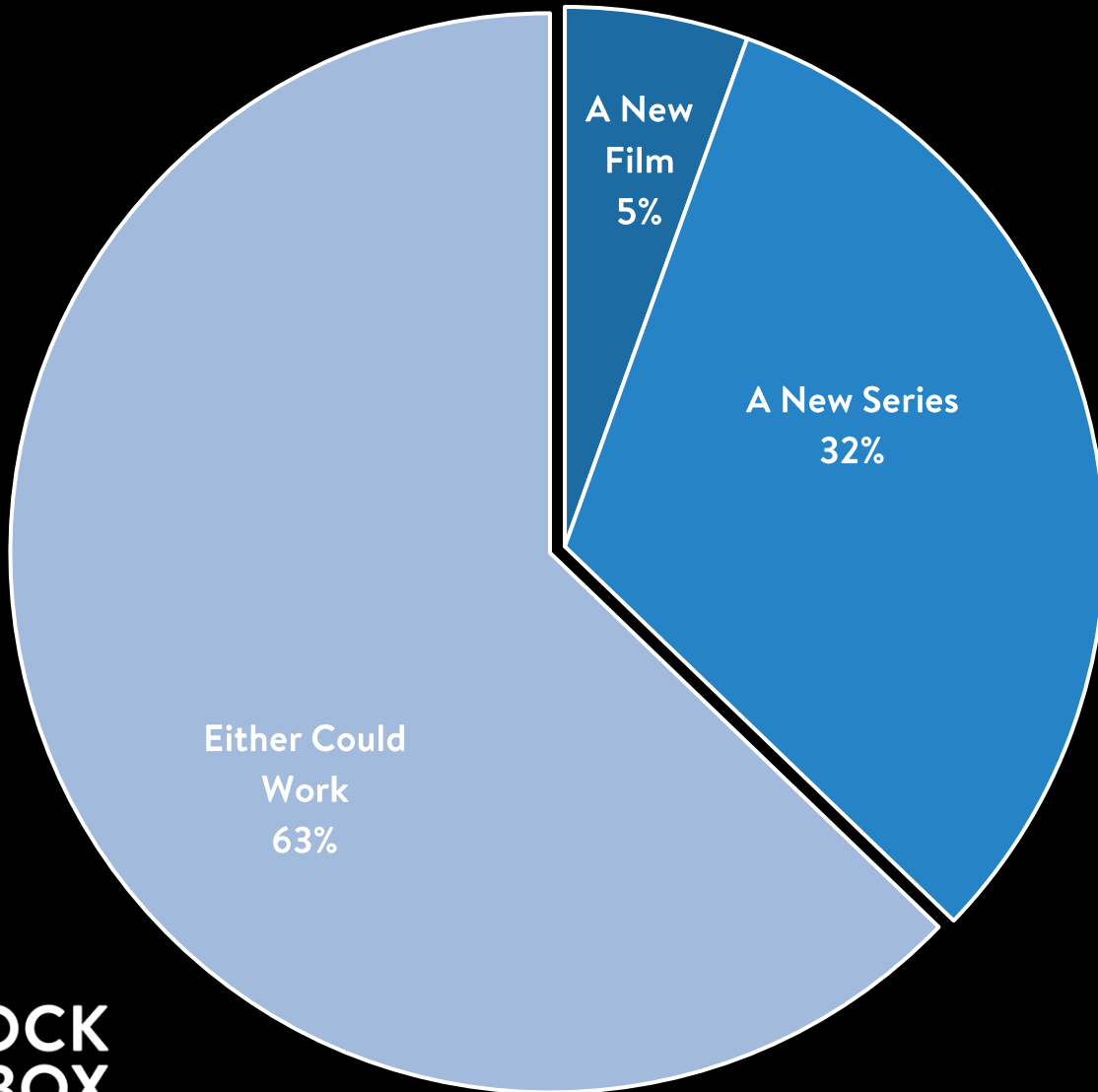
It's clear that those that do have Disney+ consider it good value.



VOD Student Research

Q, What might cause you to try a new VOD streaming app?

Series and dramas seem to be the biggest draw for first time use, however a large majority are still attracted by either.



Students have an
average **monthly**
spending
power of **£807**

(Save the Student 2019 Survey)



UK university **Students**
have a combined
spending power of **£23**
Billion annually

(Youthsight)





If primed first by OOH,
engagement on social is
boosted by **52%** while
spontaneous brand recall
on social is increased by

125%

(Lumen)

Striving to **effect change**,
85 % of Gen Z seeks companies that
prioritise solving world problems.
The same percentage of Gen Z'ers
are more likely to **make a
purchase** from a company after
they've learned the brand is
socially responsible.

(payment Source)





23% of 18-24s have
downloaded a mobile
app **after seeing** an
outdoor digital ad

(Kantar)



ROCK BOX THANK YOU

www.rockboxadvertising.com

Paul.Carr@RockBoxAdvertising.com
Tel: 020 7907 0840

ALAN TUDYK IN
**THE SCI-FI
MURDER MYSTERY
DOCTOR DRAMEDY
EARTH NEEDS NOW.**

NOW TV

resident
alien

The advertisement features a man in a green jacket sitting in the driver's seat of a red car. The background shows a town with colorful buildings and mountains in the distance. The text is overlaid on the image in various colors and fonts.