

THE NOW

REPORT



An insider's guide to what collegians are thinking & doing

BACK TO CAMPUS ... BACK ONLINE

Students flock back to campus to start a new semester

How different are college students from the rest of the population when it comes to the shift to online video?

Comparing statistics collected within the August update of the Now Report with the results of the Pew Internet / American Life Project's [Online Video](#) study (published July 25th, 2007), we can see that college students are at the leading edge of on-demand, downloaded video consumption.

While 57% of adult Internet users have ever watched online video, 93% of college students have ever watched online video. On a typical day, 19% of Internet connected adults download video, whereas more than three times as many (62%) college students download video.

College students are egalitarian when it comes to online video, consuming both amateur and professional content.

PRODUCTION PREFERENCE	GENERAL INTERNET POPULATION	COLLEGE STUDENTS
Professional	62%	40%
Amateur	19%	6%
Both	11%	44%

Students are also more likely to pay for movies and other professional content than the rest of the population. While 7% of the general Internet population has ever paid for online video, 14% of college students have paid for video content.



Shift Happens

US College students are the vanguards of a generation that has come of age as the foundations of the media industry are being fractured by technologies that detach content from the media for which they were originally created.

THE SHAPE OF THINGS TO COME ...

USAGE PATTERNS	GENERAL INTERNET POPULATION*	COLLEGE STUDENTS
Receive video links	75%	91%
Send video links to others	57%	83%
Watch video with others	57%	41%
Rate video	13%	40%
Post comments about videos	13%	34%
Upload videos	13%	37%
Post video Links online	10%	47%

* Source: Pew Internet/American Life Project Online Video Report

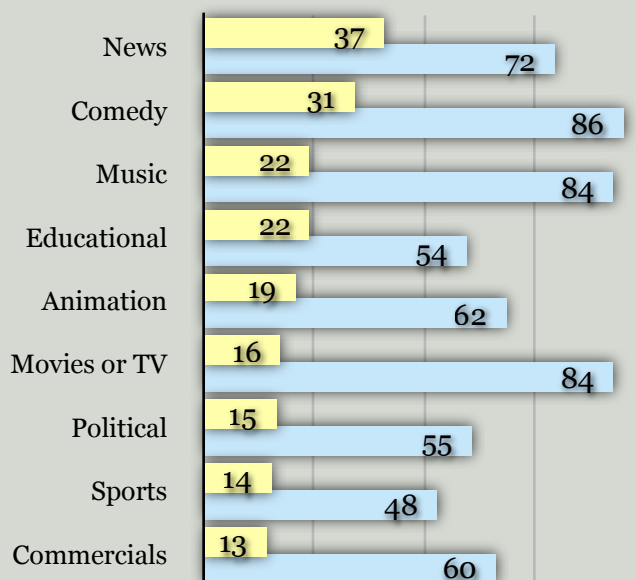
College students' desire to share viewing experiences with others is evidenced by higher percentages of students who send and receive links to online video to and from others.

While sharing links enables the sharing of experiences at different times and in different places, fewer college students share the actual watching of online video content in real time with others than is the case within the general Internet population.

The line between creator and consumer is blurring for the next generation ... college students are fully engaged in the process: rating videos, posting comments, uploading their own videos and publishing links to videos on web and blog sites.

Types of Online Video 'Ever' Watched

■ Internet Population ■ College Students



While all types of content have ever been viewed, college students favor comedy, music and television / movies at levels that far exceed the general Internet population. News, animation and commercials form a secondary tier of content, while political, educational and sports content, while still viewed by half the college population, are the least viewed types of content.

The Players

YouTube dominates the field for online video content, cited by nine in ten students (90%) as a site that they visit. Distant followers are Google Video (38%), iTunes (34%), MySpace (32%), CollegeHumor (31%), ABC.com (31%), Ebamsworld (28%), CNN (25%), Yahoo (20%), MTV.com (18%), AOL Video (13%), NBC.com (12%), MSN Video (12%), DailyMotion (10%), FOX.com (10%), CBS.com (9%) and Veoh (9%).

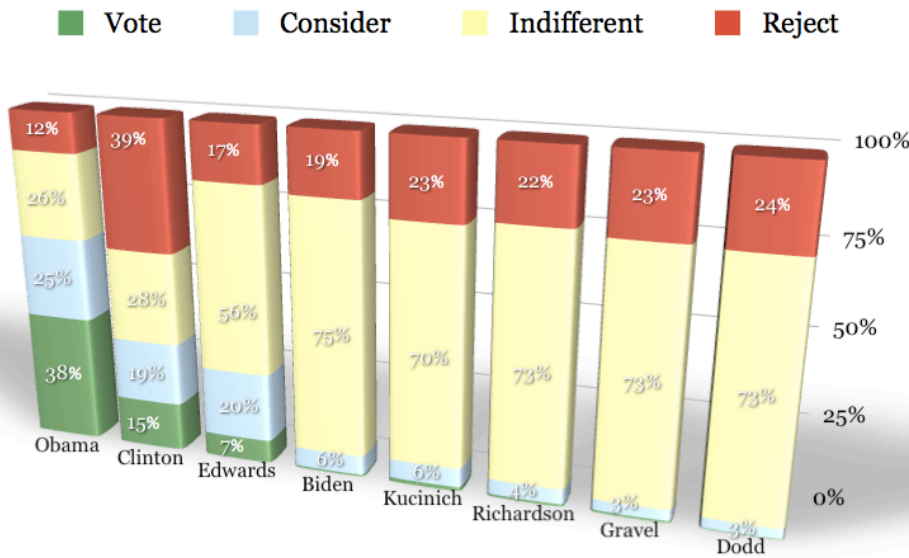
YouTube is the site that college students visit most often, with two-thirds crediting YouTube as their most frequented site. There were no other sites that challenge YouTube's dominance, with all other sites garnering low single-digit figures for visited most often.

Nearly four in ten college students have downloaded full-length movies. Of these movie downloaders, roughly one third pay for their downloaded movies, one third download movies illegally and one third mix their downloading between paid and unpaid (illegal) sources.

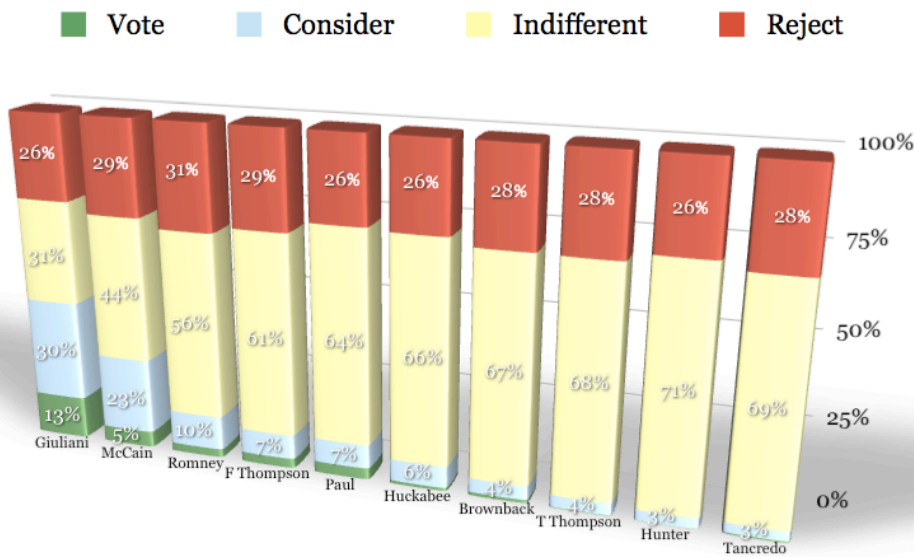
Paid movie download is dominated by iTunes, which was mentioned by more than two-thirds of college students (69%). Netflix holds second place at 18%, while Amazon's Unbox and the Google Video store tie for third place at 5% each.

Illegal video downloads are obtained from peer to peer file sharing services, the most popular of which are BitTorrent (45%), Kazaa (24%) and DC++ (14%).

Democratic Candidates



Republican Candidates



DEMOCRATIC CANDIDATE

Barack Obama leads the presidential race, with nearly two of five (38%) college students ready to cast their vote his way. Hillary Clinton trails with 15% while John Edwards comes in third with 7% of votes.

REPUBLICAN HOPEFUL

The GOP faces an uphill struggle among college students, with Rudy Giuliani garnering the highest levels of voting intent (13%) and consideration (43%) across the Republican candidates.

HILLARY REJECTED

Hillary Clinton polarizes US college students, with the highest levels of rejection of all candidates, Republican or Democrat. More people WOULD NOT than WOULD consider voting for Hillary.

STAY AWAY FROM HILLARY

IPHONE UPDATE

Since May, a slow but steady softening in demand for the gadget from Cupertino developed as students waited for prices to fall and version 2.0 to arrive. And what a difference \$200 makes!

By dropping the price from \$599 to \$399, the iPhone is within closer reach for students, with short-term purchase intent (immediate or within a few months) climbing from 2% to 4.5%. The percent of students planning on switching to the iPhone once their contract expires leapt from 4% to 11%. Resistance to the iPhone is decreasing with the percentage of those stating that they would never purchase an iPhone falling from 17% to 11%.

As witnessed in the May Benchmark study, Apple is one of the most revered companies in the minds of college students. Did the 3% who had already purchased an iPhone experience brand-lash in the face of the unexpected and dramatic price shift?

We measured reactions to the price shift using a five-point semantic differential scale, asking students if they agreed with the statement 'It's appalling that Apple would treat its customers this way' versus 'Apple makes great products and can charge whatever it wants.' Non purchasers tended slightly toward supporting Apple with a mean score of 3.26 while purchasers tended slightly toward reprimanding Apple with a mean score of 2.77.

	MAY (N=2000)	JUNE (N=1000)	JULY (N=1000)	AUGUST (N=1250)	SEPT 5TH (N=1000)
Aware	86%	97%	99%	98%	98%
Purchased (Self Reported)	N/A	N/A	2%	3%	3%
Purchase Intentions					
Immediate Intent	3%	2%	0%	0%	0.50%
Within a few months	3%	2%	2%	2%	4%
When my contract expires	3%	2%	5%	4%	11%
Wait until version 2.0	3%	2%	22%	22%	22%
Not in the near future	3%	2%	50%	55%	52%
Never	3%	2%	20%	17%	11%



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