

VIDEO TRENDS

US Study
GFK / IAB April 2014



US MARKET RESEARCH MADE BY GFK / IAB 2014



- **TV Online** – Network TV shows online such as *Pretty Little Liars*, *The Walking Dead*, *Colbert Report* or those found on sites like *ABC.com* or *Hulu.com*
- **Amateur** – called “amateur online video - ” for the survey respondents – defined as: created by regular people and looks and feels like it is home made. (Examples are baby videos or funny cat videos)
- **Original Digital Video** – originally produced online video – defined as professionally produced video only for online distribution and viewing (not TV). (Wall Street Journal Live News, Glamour Do’s and Don’ts of the Week, Weather.com Behind the Scenes videos, etc.); online-only companies (for example Funny or Die, HowCast, Netflix Original Series (Orange is the New Black, House of Cards); or YouTube’s Original Channels (Buzzfeed, The Onion)

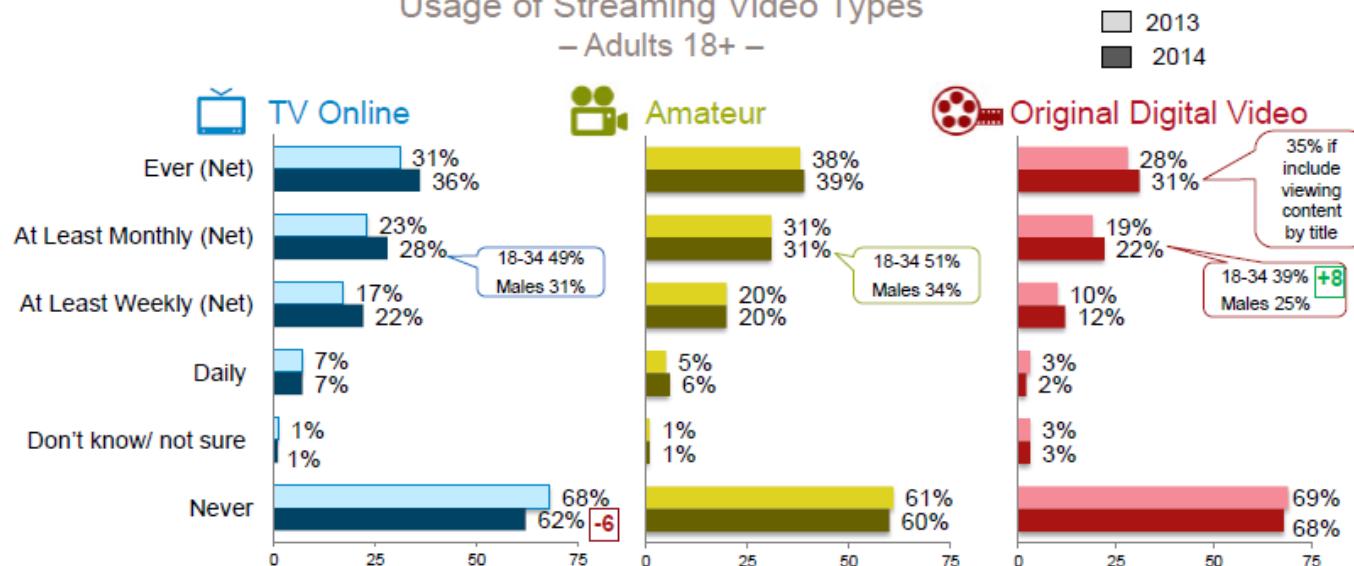
US Study



USAGE OF STREAMING



Usage of Streaming Video Types
– Adults 18+ –



Both Original Digital Video and TV Online enjoy directional increases in monthly and "ever" use, which shows more consumers are turning to the internet for video entertainment, and more frequently. Amateur use is flat.

Watching "on my own schedule" is the top driver of use for Original Digital Video (41%), and one of the main aspects liked better about Original Digital Video over Primetime TV. Smartphones (46%) and tablets (41%) are now being used at levels almost twice that of a year ago, use reflected in twice as many reporting using Original Digital Video while traveling as a year ago. However, the majority of viewing still occurs at home (87%; 65% Home only).

PERSONAL EXPERIENCE

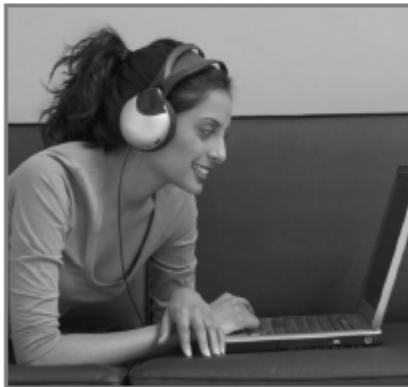


TV is often described as 'social viewing' where control is shared.

"When you are watching with someone else, you aren't In control. Control belongs to the others in the room." Male, 52

"Friends usually take over the remote when they come by." Female, 23

"Compromise is part of what makes it a family situation." Female, 43



Original digital video is often described as a personal, private experience where the viewer is in control.

"I like the privacy of being able to put on my earphones and not bother others in the room. Male, 29

"I like to watch on my phone or laptop. It's a more personal experience" Male, 38

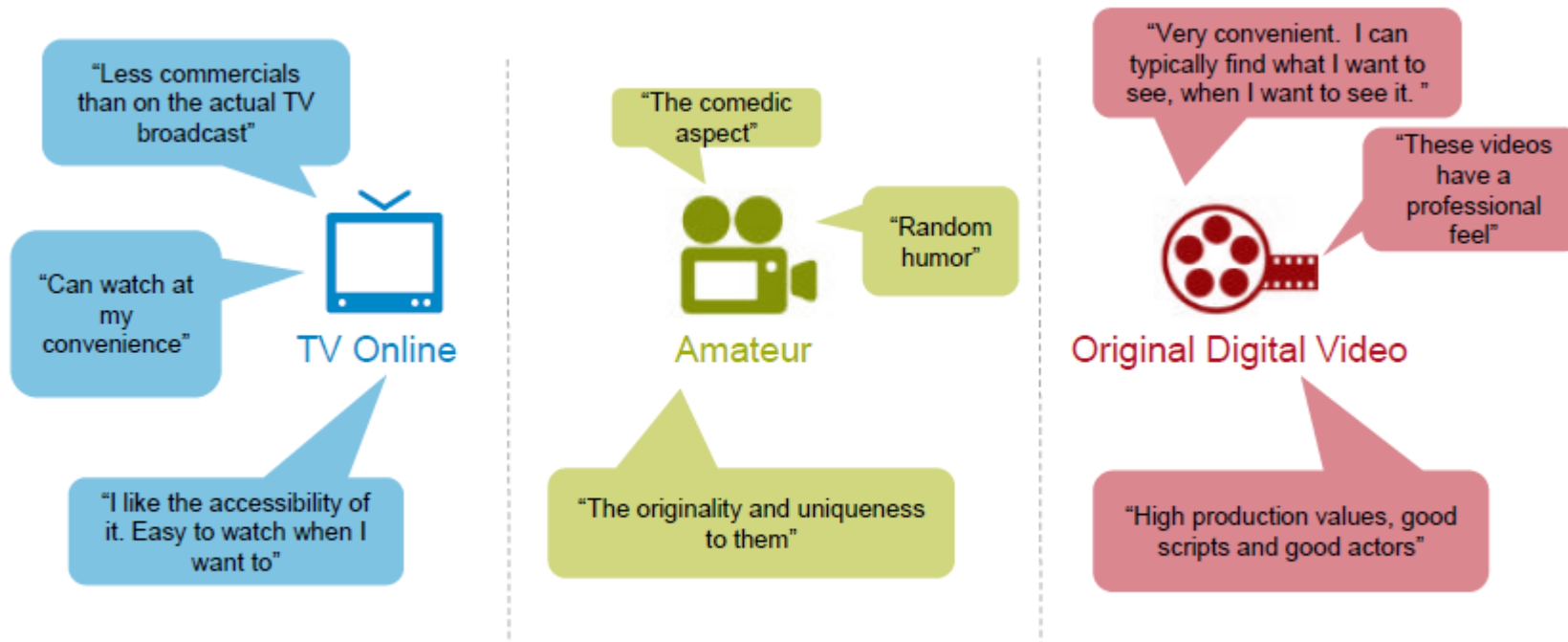
Source: Qualitative Online Focus Groups

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PERSONAL EXPERIENCE



Q14a/b/c. Overall, what do you like best about the experience of watching [video type]?
Base: Viewer of ... TV shows online (n=614), Amateur (n=683), Original Digital Video (n=490)
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CONCLUSION FOR LEARNINGS

