

Executive Summary



Specific Media has released a major piece of research conducted amongst users of video content online – shedding light on the consumer experience. Conducted in March 2011 amongst a group of 1,000 consumers who had viewed online content in the previous month, the research examines consumers' motivations for viewing and, crucially from an advertising planning perspective, the consumer mindset – and how these differ to consumption of more traditional TV content. Key themes to emerge from the research include:

Motivation:- The study discovered that most traditional TV viewing occurs either out of habit or as a desire for a shared experience with family and friends. Motivators for online viewing are far more personal and involving, revolving around factors such as lifestyle and convenience – TV content on the consumers' terms.

Participation:- Whilst the stereotype may be of funny animal clips, the study illustrates the deep level of consumer participation in the online video experience. Consumers actively search and seek quality content, and interact at a deep level – commenting, sharing and discussing content.

Involvement:- The consumption of online video content is a far more involving and active process when compared to its more passive and habitual sibling, traditional TV. The combination of participatory factors with the ingredients of viewer selection and choice fuse to create a rich, deep, lean-forward experience.

Experience:- Consumers are deeply engaged with online content. The study showed that satisfaction with both content and the actual viewing experience is high, and in essence, the box in the corner of the living room has moved online. Top content categories viewed by consumers were TV programming, Music Videos and News – with UGC in the bottom third of content categories viewed.

What does this mean for advertisers? Online video is revolutionising the way consumers interact with content. Once the preserve of a handful of channels on one box in the living room, consumers are now engaging with high quality content on their terms – when they want, what they want and how they want.

This has an impact on the overall consumer experience – it is not a simple transfer from TV to online, the two are very different. The online environment brings with it unique, web-enabled features that has transformed the way users consume content – making it a more involving, more participatory and more engaging experience.

In addition, the study looked at consumers' perceptions and expectations of advertising around online video content. Recall levels are high, consumers feel more in control of the advertising and it is seen as relevant and engaging.

For more information on the study please contact Chris Worrell, EU Research Manager, Specific Media.



Consumers and Video – Key Take Outs



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The majority of online video viewing occurs through traditional connected devices – the desktop and laptop

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Viewing on mobile devices is much higher amongst younger consumers – the early adopters, whilst IPTV and Tablet viewing is more prominent amongst 25-34s, given the price point of devices

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Most viewing occurs within the home environment – online video content is consumed within the environs of traditional TV viewing

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The volume of content consumed is high – over half of respondents view more than one hour of content a week. Volume is higher amongst males and younger age groups – 42% of 18-24s view three or more hours a week (light TV viewers)

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The majority of viewing occurs in the evening – around three quarters of respondents view content at this time. More viewing occurs on weekdays vs. weekends, with the weekend traditionally a more family orientated, sharing time of the week

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Content is engaging consumers – seven in ten feel there is a good range of content online, and a similar amount find the viewing experience satisfying. Just 24% of respondents disagreed that the online experience was less engaging than TV viewing, and one in two see it as an everyday experience rather than a novelty

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A variety of content types are consumed – the majority professionally produced content. Top three content categories amongst respondents were: Full length TV shows, Music Videos and News content

Consumers and Video – Key Take Outs



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TV viewing is 3.5 times more 'habitual' than online content viewing, with over half of respondents admitting this is a motivator for viewing. Online content viewing revolves more around selection, choosing content is 2.5x more likely to be a motivator for viewing content, and fit around lifestyle 1.7x more likely

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Viewing online content is an active experience for viewers compared to TV. Twice as many respondents described their viewing experience as active compared to TV, whilst 66% describe TV viewing as passive

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Online content viewing is participatory – respondents were twice as likely to have viewed content after actively searching for it than they were after being sent a link or to kill time

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Video content is engaging consumers in a way that TV cannot – due to the nature of the format and medium. Nearly half of respondents had discussed content with friends and family and the same amount had looked for more information after seeing content

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Viewers are involved with video content online too – one in four surveyed had commented on content, shared content via social media and forwarded content on

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Online video content offers advertisers a sense of immediacy, with nearly half of consumers searching / surfing the web during their viewing session – allowing advertisers to engage with consumers at a time when they are ready and able to act

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Advertising is viewed differently to TV – users feel more in control of online video advertising and, given the way it is consumed, are two times less likely to do something else when adverts appear than they are with TV