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## **Drivers & Barriers To Online Video Viewing**

**February 8, 2005**

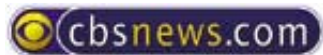
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**FRANK N. MAGID ASSOCIATES, INC.**

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# Online Publishers Association (OPA)



new york times digital



# Researching Online Video Viewership

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- Goals:
  - Build a demographic and behavioral profile of online video viewers
  - Identify drivers of and barriers to online video viewing
  - Understand various types of online video content and their relationship to viewers

# Participating OPA Web Sites

- **BusinessWeek.com**
- **CBS.MarketWatch.com**
- **CNET Reviews**
- **DIYnetwork.com**
- **Edmunds.com**
- **ESPN.com**
- **FineLiving.com**
- **FoodNetwork.com**
- **Forbes.com**
- **GameSpot.com**
- **HGTV.com**
- **iVillage.com**
- **LATimes.com**

- **MSNBC.com**
- **MTV.com**
- **NYTimes.com**
- **Reuters.com**
- **Reuters.co.uk**
- **Sun-Sentinel.com**
- **TheBostonChannel.com**  
(IBS)
- **USATODAY.com**
- **Wall Street Journal Online**
- **WashingtonPost.com**
- **Weather.com**
- **WFAA.com (Belo)**

# Methodology & Sample

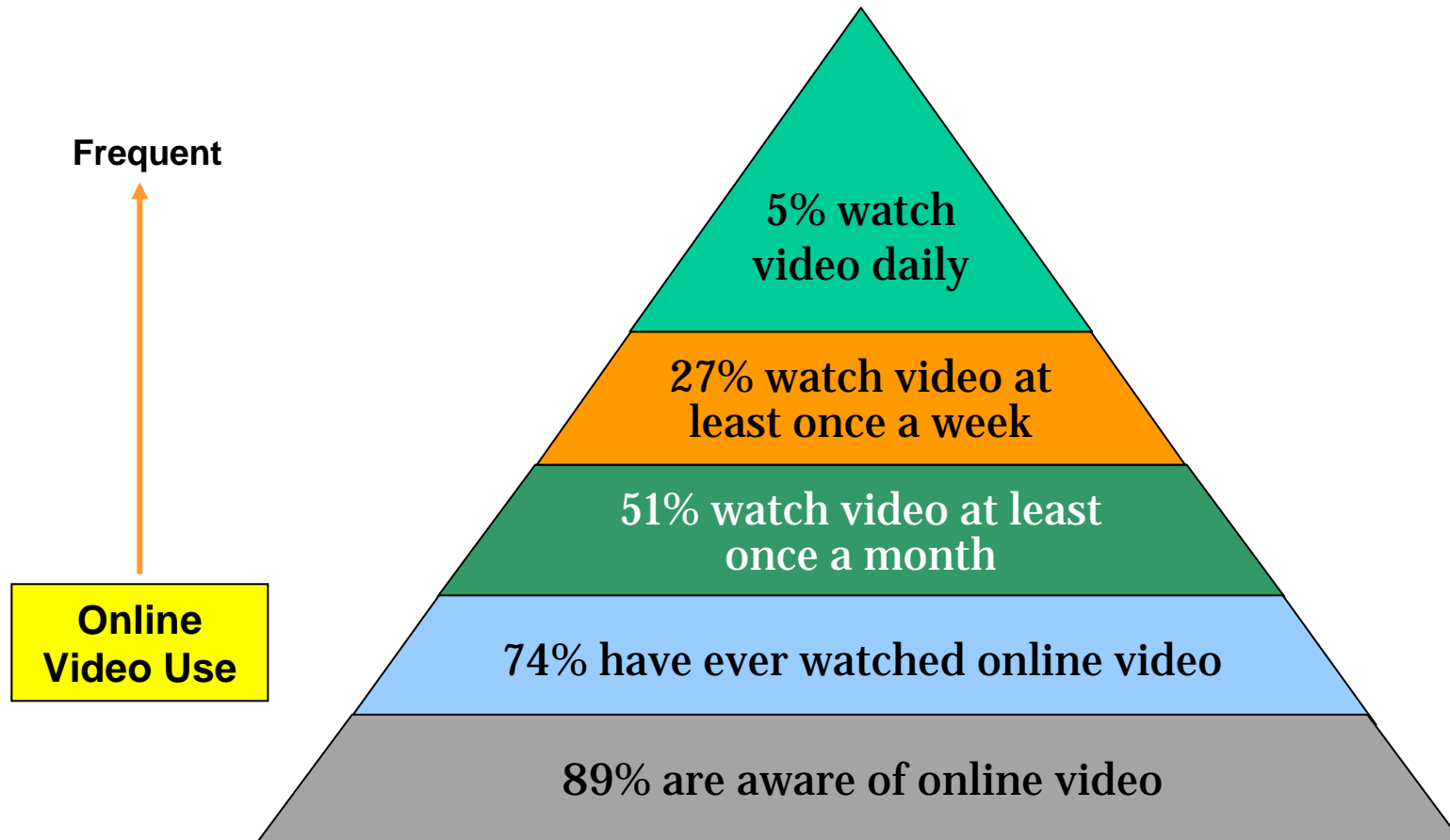
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- Online survey of 27,841 Internet users age 13 and older conducted on 25 individual Web sites
- Recruitment method: General site sample through pop-up intercepts on home page and several key entry pages
  - One to two weeks field period per site
  - Survey hosted at Frank N. Magid Associates' online division [surveysonline.com](http://surveysonline.com)

# Online Video Viewing Behavior (Anywhere On The Web)



# Online Video Viewing Is A Common Activity For Many Internet Users



BASE: Total sample (N=27,841).

# Video Viewers Have Very Desirable Demographics

	Video Viewers (74%)	Non-Video Viewers (26%)
Gender	63% male	49% male
	37% female	52% female
Mean Age	40 years	44 years
50+ years	28%	42%
Married	56%	58%
Single	30%	23%
Household income \$100K+	23%	16%
Socio-Economic Status	47% high	34% high
	43% middle	51% middle
	10% low	16% low

*Group Definitions: Video viewers are a combination of Frequent viewers, which watch online video at least once a week (N=6,780) and Infrequent viewers which watch online video less than weekly (N=11,740). Non-viewers are a combination of intenders who currently don't watch online video but are likely to start (N=5,501) and those who are likely never to watch (N=1,085).*

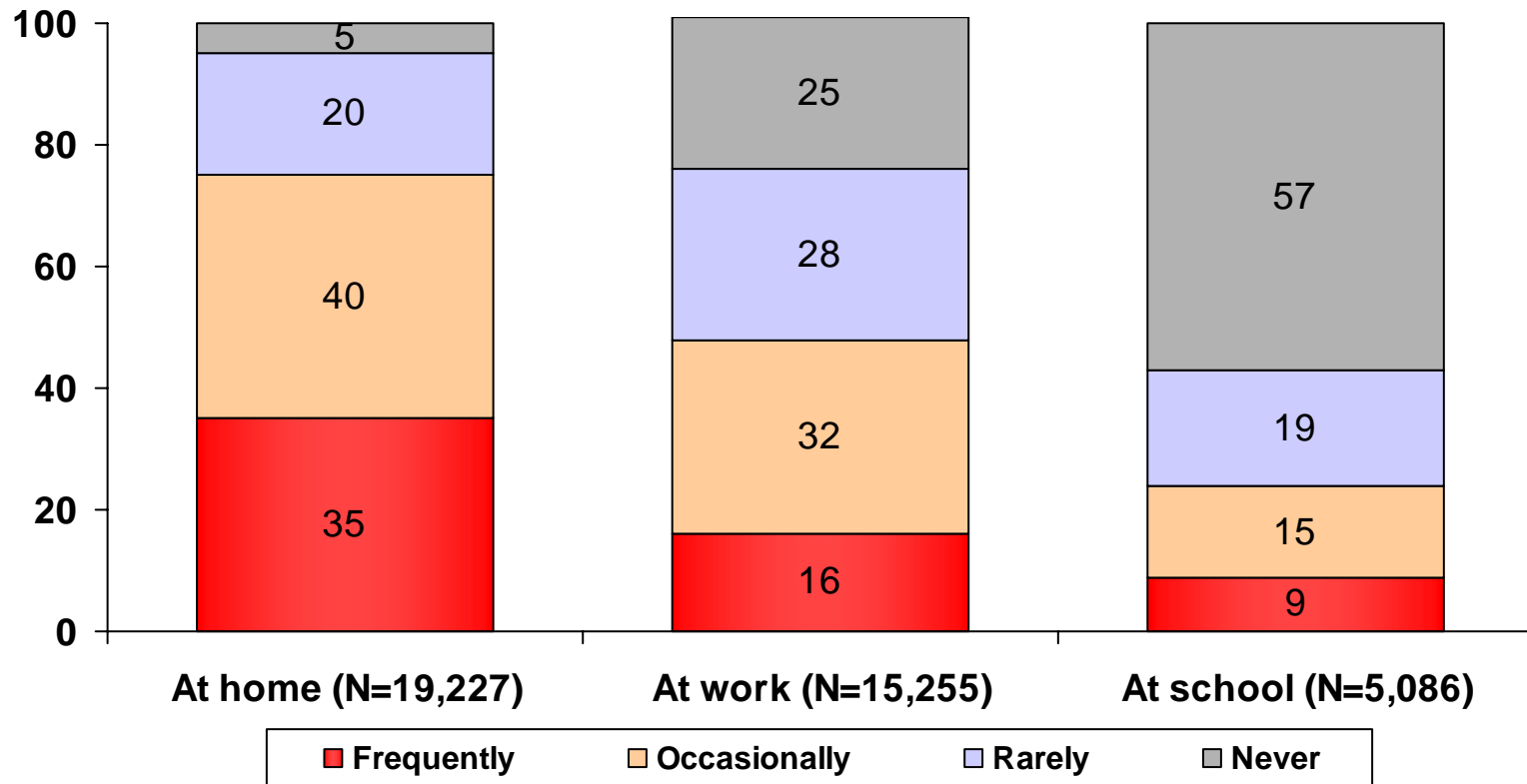


# Online Video Viewers Are Heavier Internet Users & Video/DVD Watchers

	Video Viewers (74%)	Non-Video Viewers (26%)
High-speed Internet access at <u>home</u>	76%	51%
High-speed Internet access at <u>work</u>	87%	69%
Use Internet frequently	77%	60%
Watch TV frequently	52%	53%
Read newspapers frequently	51%	51%
Read magazines frequently	36%	33%
Watch videos/DVDs frequently	21%	15%
Play video/PC games frequently	15%	12%
Computer screen size 19+ inches	23%	15%

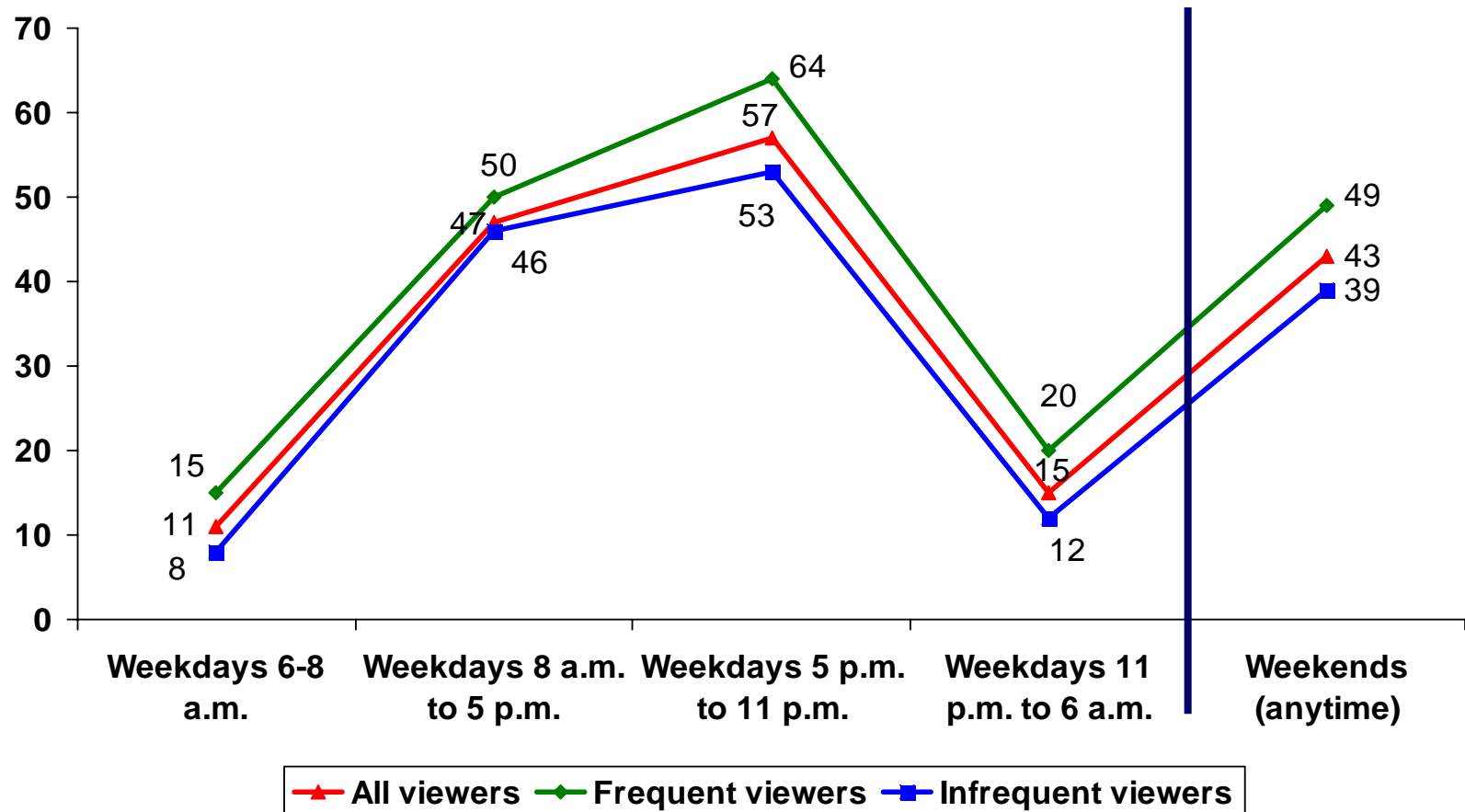
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# 35% Of Viewers Frequently Watch At Home, 16% At Work



Q.5 How often do you watch online videos at the following locations? BASE: Online video viewers with Internet access at those locations.

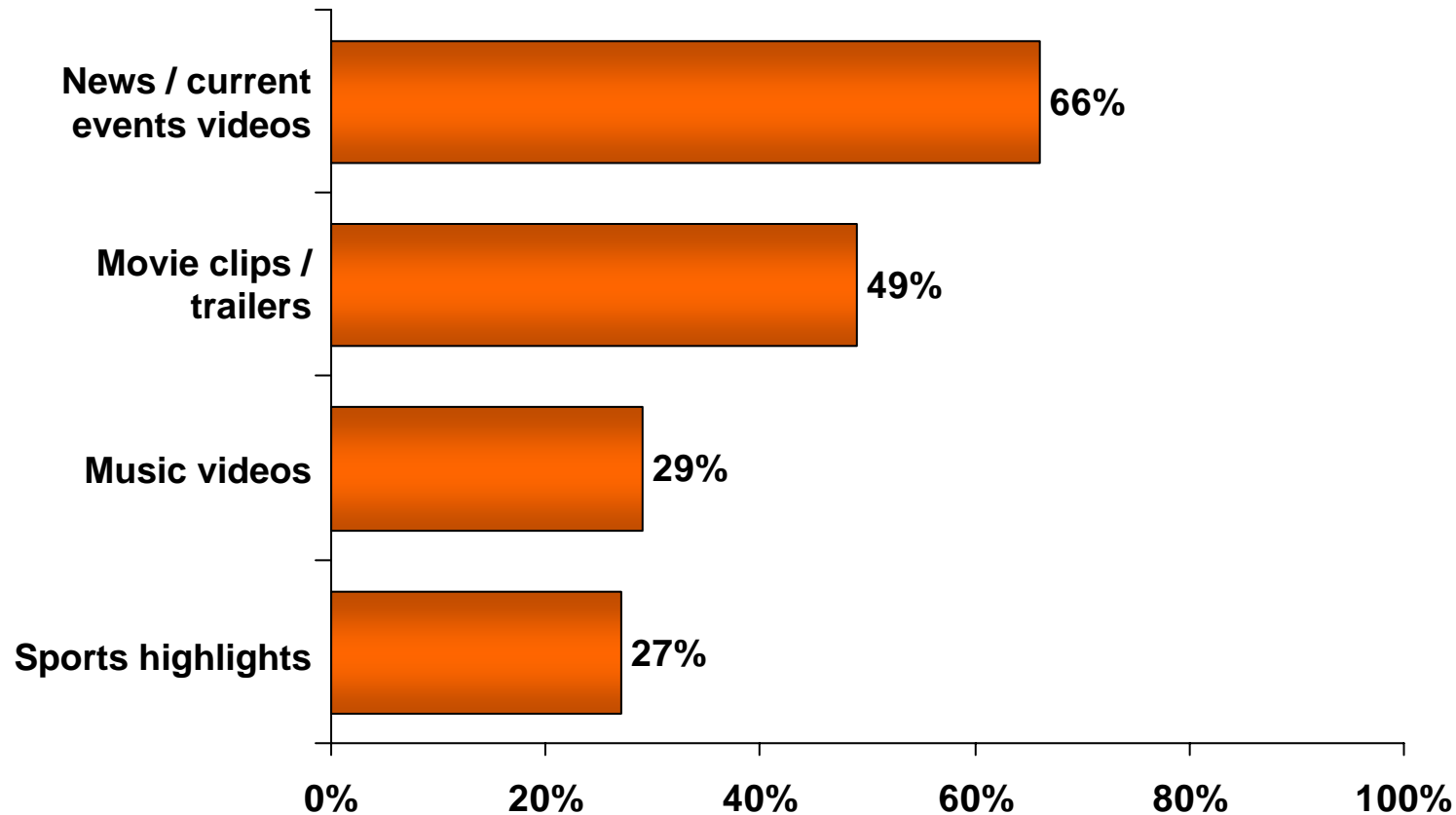
# Daytime, Evening and Weekend Online Video Viewership is Strong



—▲— All viewers —◆— Frequent viewers —■— Infrequent viewers

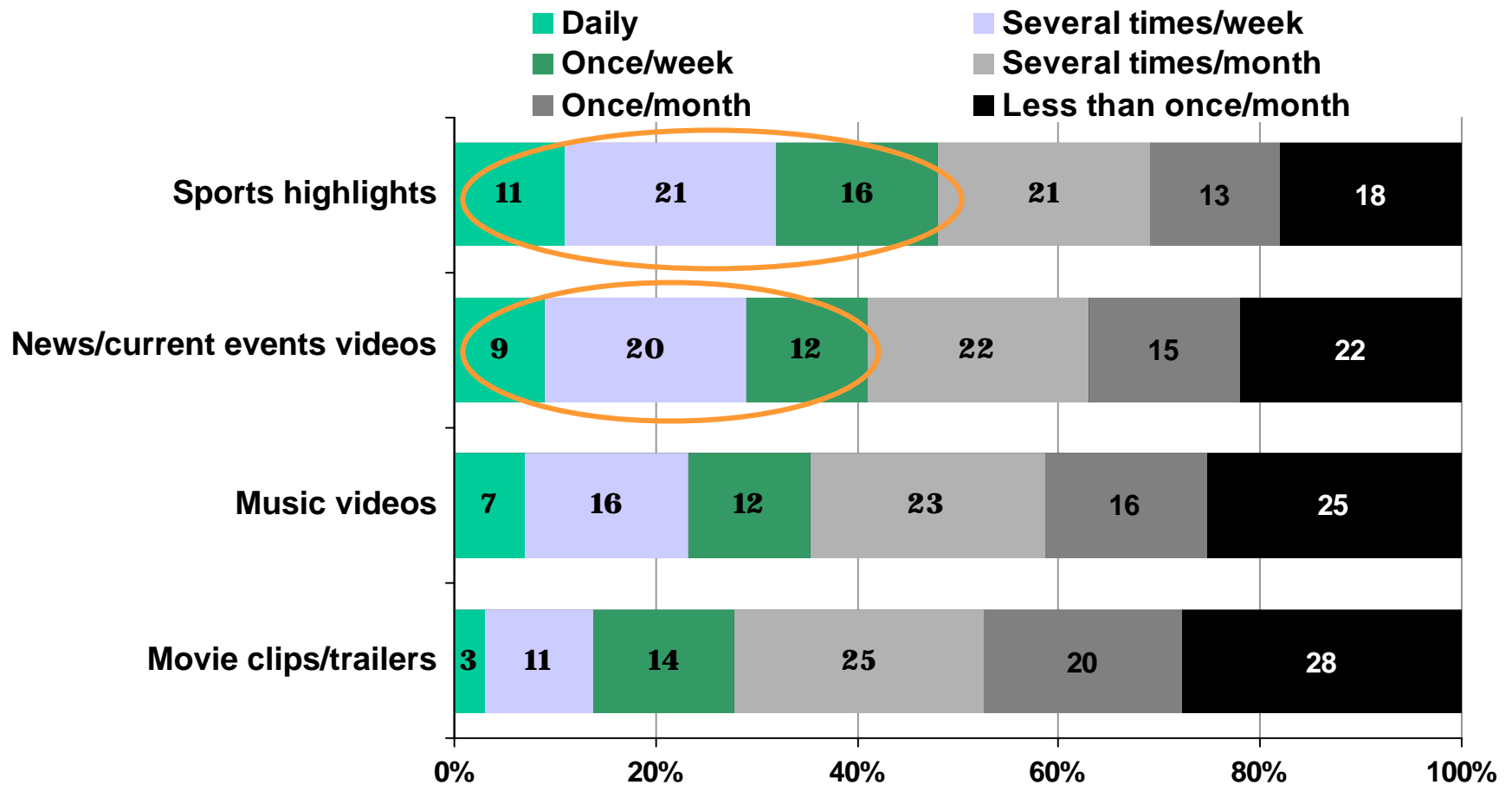
Q.6 During which times of day do you usually watch online videos? BASE: Online video viewers (N=20,470). Frequent view weekly, Infrequent view less than weekly

# News Clips Are The Most Commonly Watched Type Of Video

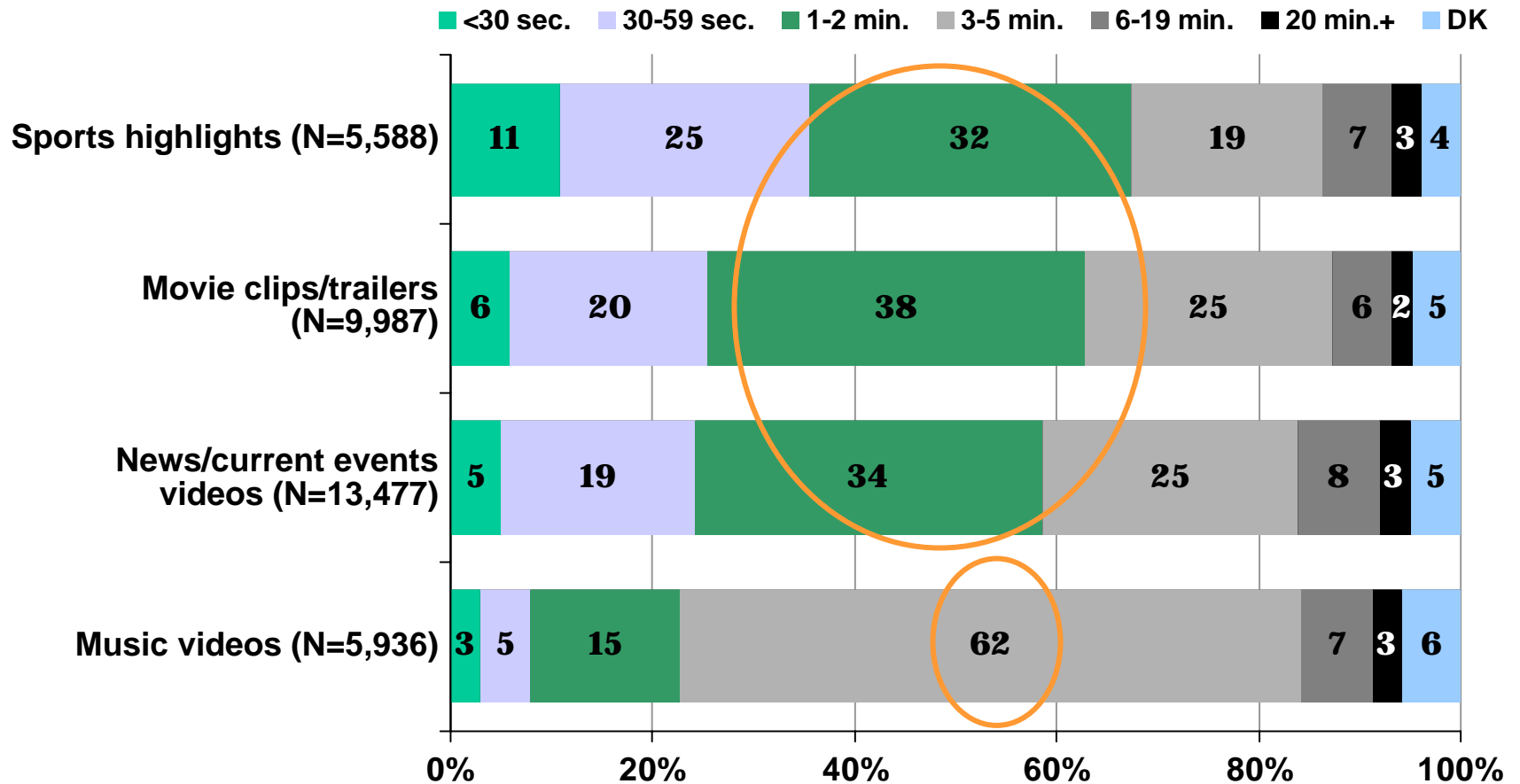


Q.3: Which of the following types of video do you watch on the Internet? BASE: Online video viewers (N=20,470).

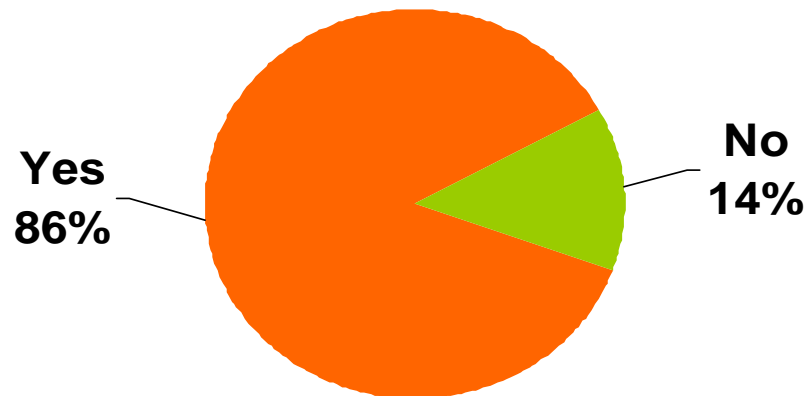
# Sports Highlights Are The Most Frequently Watched Online Videos



# Preferred Length Of Video Types



# 86% Watch Online Video in Their Entirety

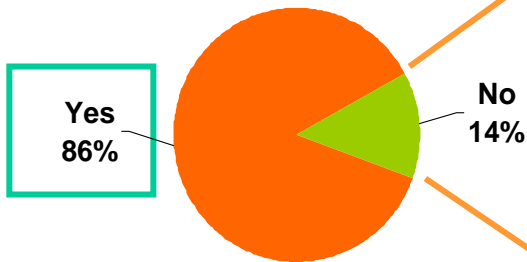


*Q.56A: When you watch videos on SITE, do you usually watch the entire video?*

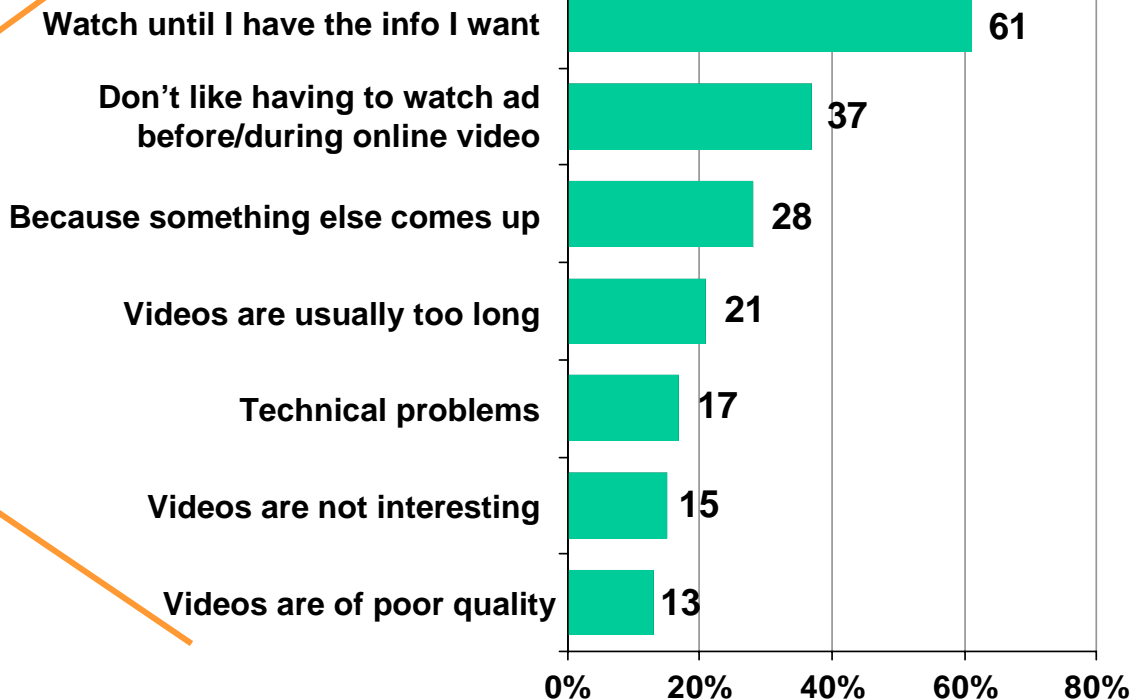
*BASE: SITE users who have watched video on SITE (N=8,854).*

# Majority Indicate that if They Don't Watch Entirety, Watch Until Get Info They Want

**When you watch videos on SITE, do you usually watch the entire video?**



**Why do you usually NOT watch videos in their entirety on SITE?**



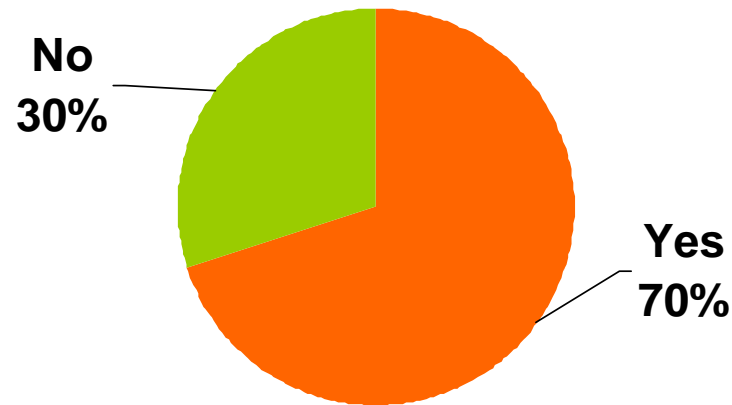
Q.56A: When you watch videos on SITE, do you usually watch the entire video? BASE: SITE users who have watched video on SITE (N=8,854).

Q.56B: Why do you usually NOT watch videos in their entirety on SITE? BASE: SITE users who have watched video on SITE and usually don't watch entire videos (N=1,191).



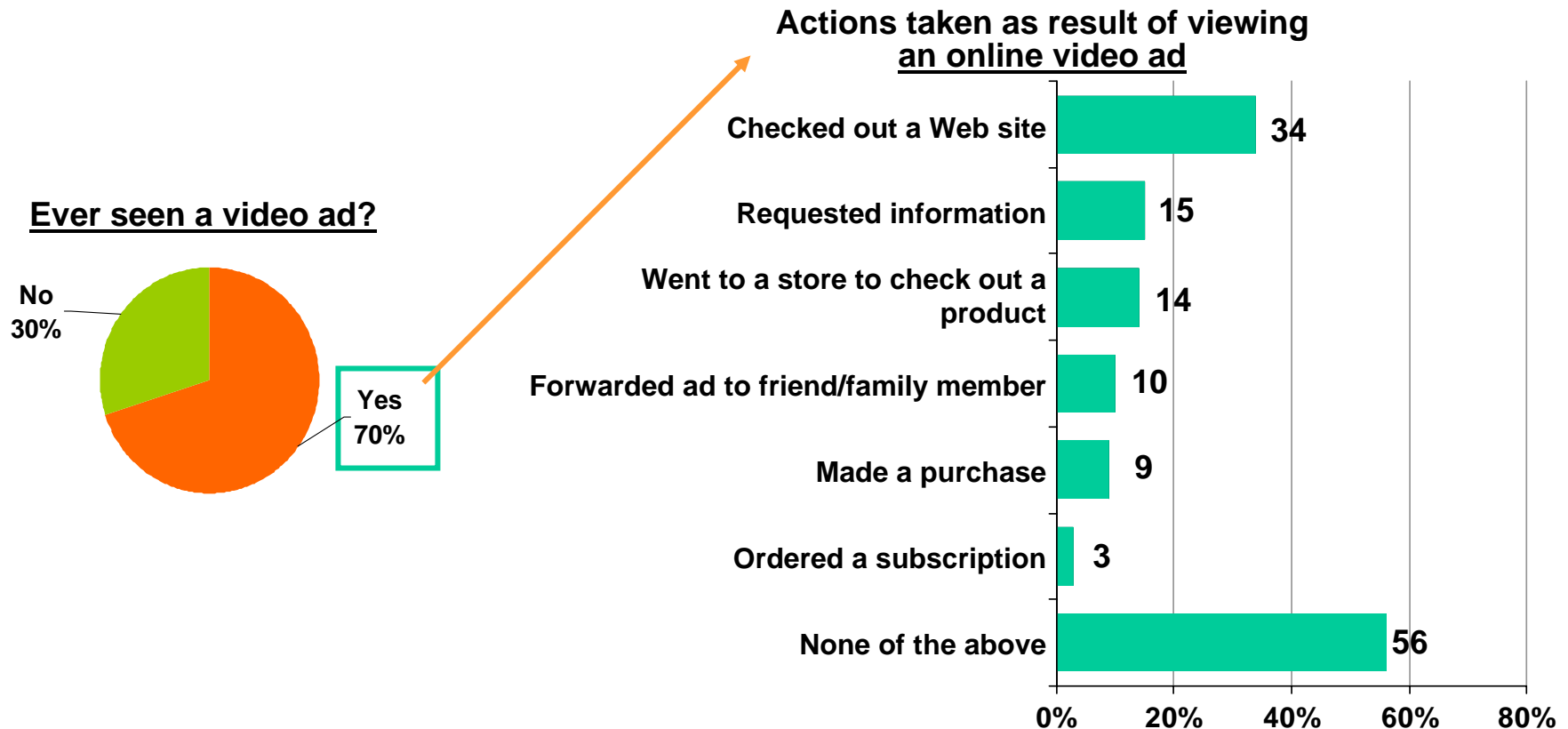
# 70% Have Seen Online Video Ads

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*Q.75: Have you ever seen a video ad on the Internet, meaning a product or service advertisement that incorporates a video clip? BASE: Total sample (N=27,841).*

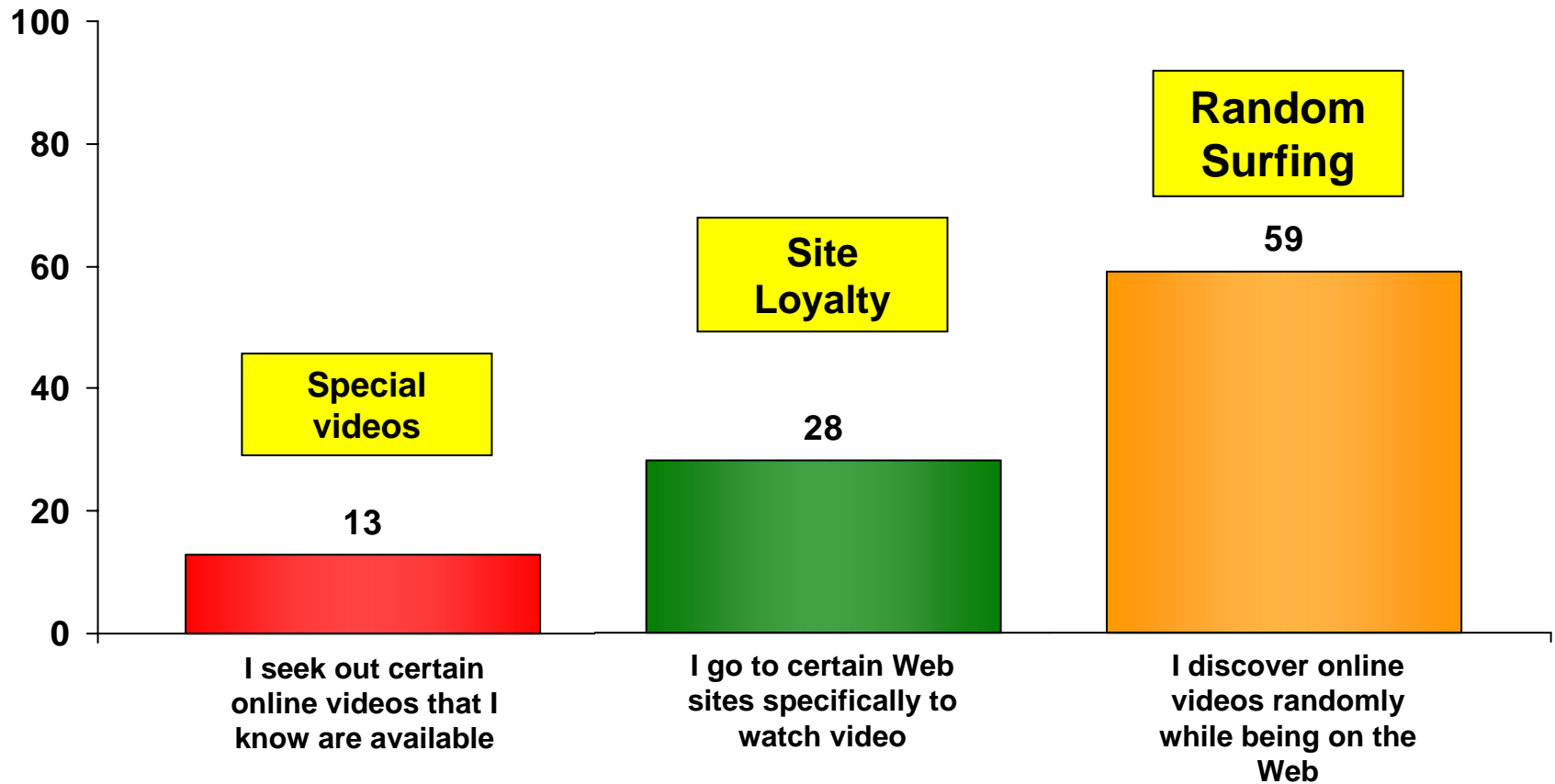
# Consumers are Taking Action Based on Online Video Ads



Q.75: Have you ever seen a video ad on the Internet, meaning a product or service advertisement that incorporates a video clip? BASE: Total sample (N=27,841).

Q.76: Which of the following have you ever done as the result of viewing an online video ad? BASE: Those who have seen video ads (N=19,608).

# Currently, Consumers Discover Online Video Thru Random Surfing

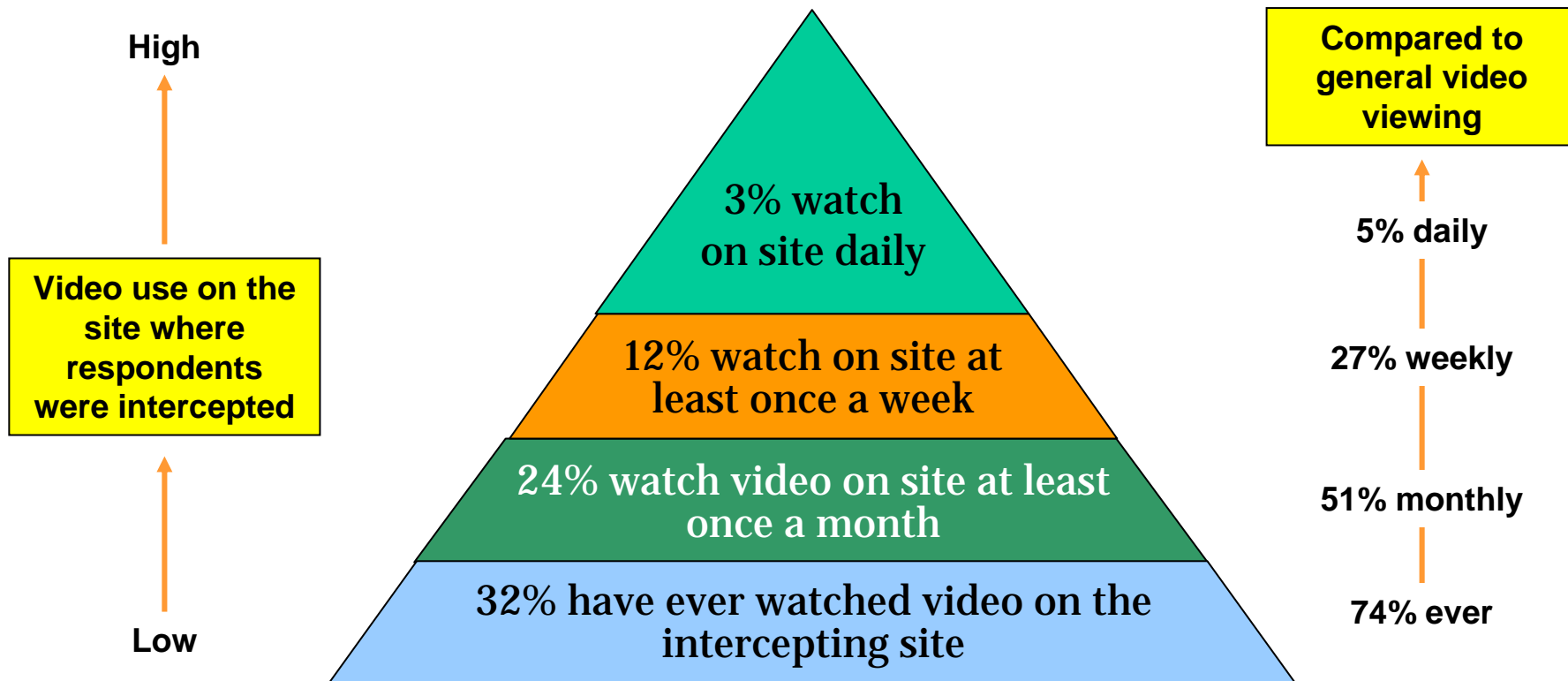


Q.26: Which of the following statements best describes how you usually watch online video? BASE: Online video viewers (N=20,470).

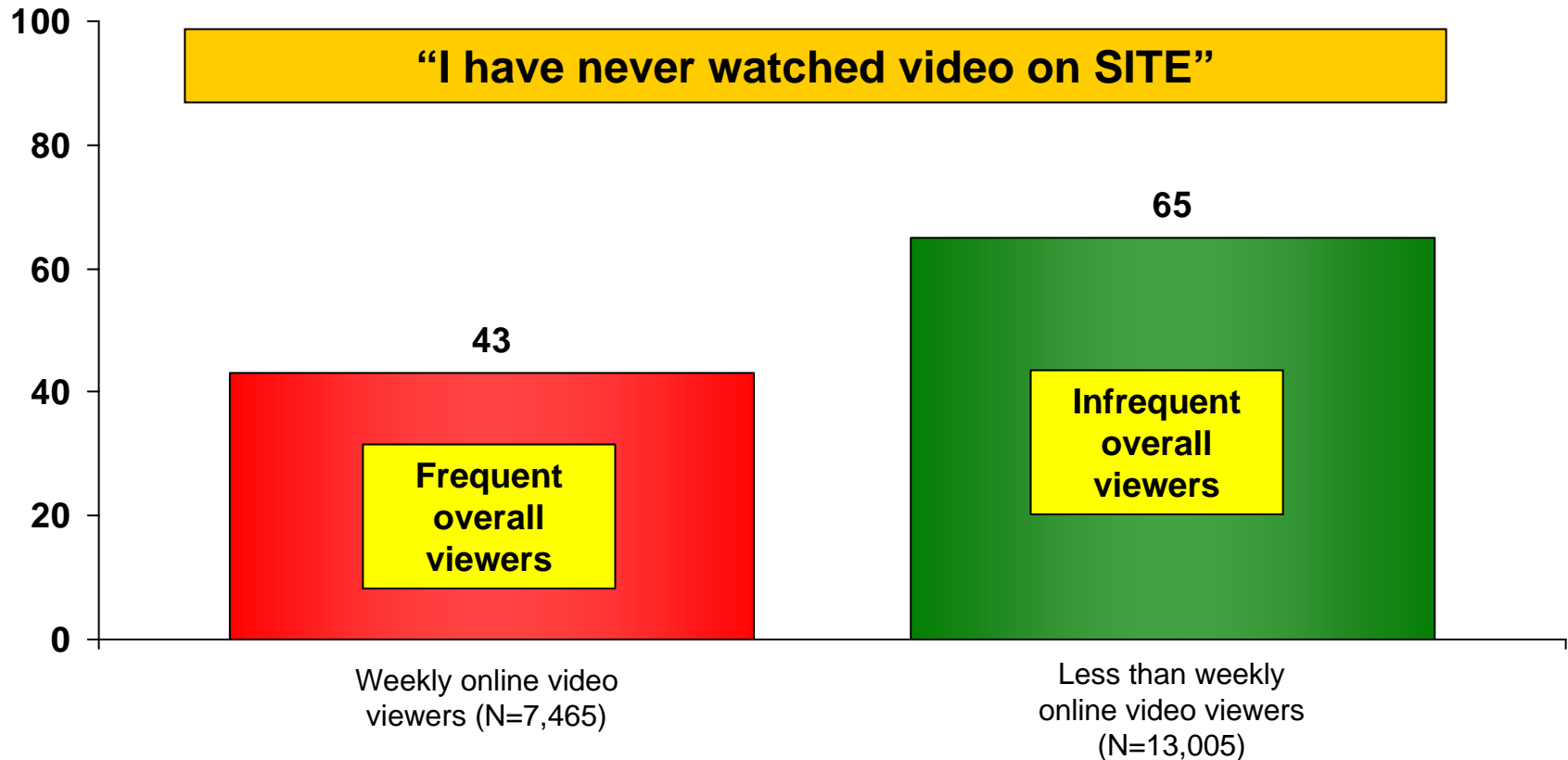
# Video Viewing Behavior On OPA Member Sites



# 32% Have Watched Video On The Intercepting Site

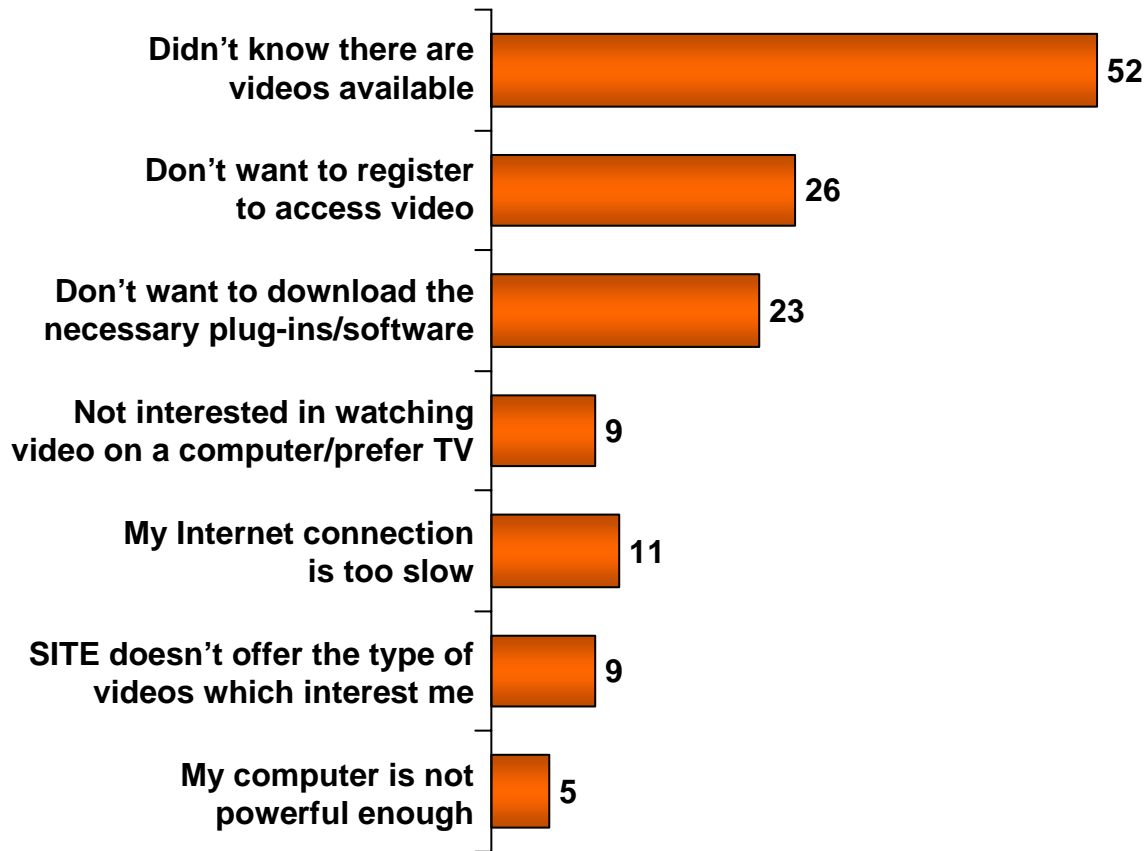


# Strong Opportunity for Publishers To Convert General Viewers Into Site Viewers



SC.F: Have you ever watched video on SITE? Percentages indicate "No" answers. BASE: Online video viewers (N=20,470).

# Reasons For Not Watching Video On The Intercepting Site



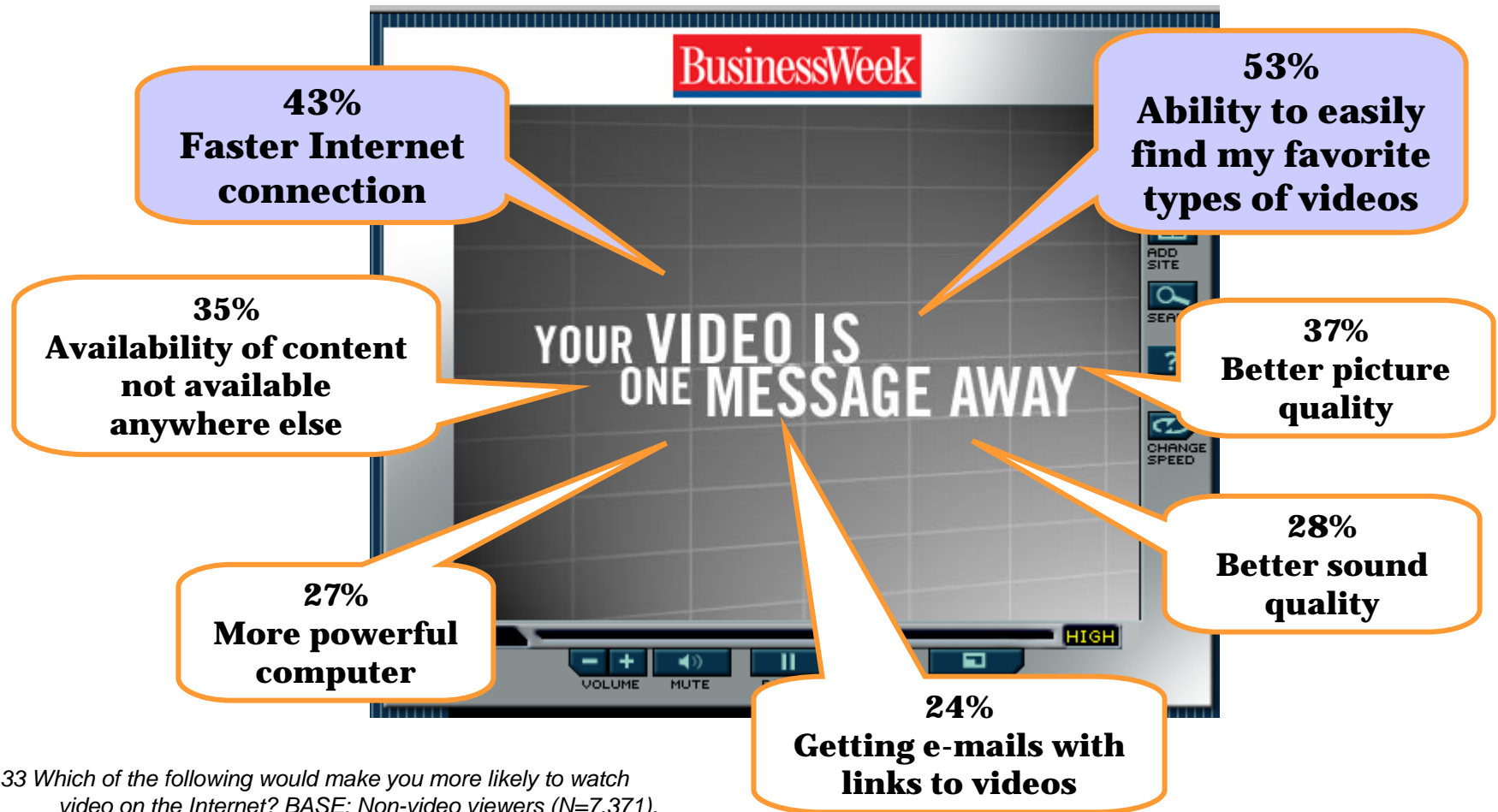
Q.58: What are the reasons you have never watched video on SITE?

# Reasons For Not Watching Video On The Intercepting Site

Barriers for SITE video viewing	Local news sites	National news sites	Business/ Financial news sites	ALL news sites	Enter-tainment sites	Life-style sites	Info/ Review sites
Didn't know there are videos available	38%	45%	50%	44%	41%	48%	50%
Don't want to register to access video	29	28	30	30	28	26	25
Don't want to download the necessary plug-ins/software	27	27	26	27	27	25	23
Not interested in watching video on a computer/prefer TV	17	15	12	14	18	18	17
My Internet connection is too slow	15	13	13	14	16	15	15
SITE doesn't offer the type of videos which interest me	10	10	9	9	6	7	7
My computer is not powerful enough	8	7	6	7	10	9	8



# What Would Motivate Non-Viewers To Start Watching Online Video?



Q.33 Which of the following would make you more likely to watch video on the Internet? BASE: Non-video viewers (N=7,371).

# Key Findings

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- 27% of sample watch video at least 1x week and 5% daily
- Desirable demo: male, high SES, broadband
- Online viewing is strong throughout the day, evening and weekends
- One third frequently watch at home, 16% at work
- News and current events are most commonly watched
- Most videos are viewed in their entirety
- Ads are noticed and acted upon
- Videos tend to be found thru random surfing
- Viewers would likely watch more if sites more effectively exposed their video content and added variety

# For More Information Contact:

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