

IAB Original Digital Video Consumer Study

May 2016

Background & Objectives



The IAB manages the NewFronts, digital video's premier showcase of new, original, professionally produced digital video content. 2016 NewFronts are running May 2-13, 2016.

As part of a comprehensive research program around the NewFronts, the IAB partnered with GfK to track consumer attitudes, awareness and usage of Original Digital Video. In its fourth year, the purpose of this study is to benchmark how many consumers are watching Original Digital Video and to inform the buying community about what original digital video viewers do, watch, think and feel about original, professionally produced digital video content.

New for the 2016 study, a small sample of age 18+ cord cutters/cord nevers were added to the overall sample to explore how this critical group makes use of Original Digital Video.

Main Objectives of the Research

- Size the market for original, professional online video (Original Digital Video) content relative to use of TV/Movie or Amateur video content
- Explore the audience experience of Original Digital Video and determine if it is different or better than the TV viewing experience
- Explore ad receptivity in Original Digital Video compared with TV advertising
- Discover any key differences in the use of Original Digital Video by cord cutters/cord nevers compared with the overall Original Digital Video audience

Study Overview

Who?

Full surveys were completed with 852 monthly+ viewers including:

- TV Online – 638 ever users; 509 monthly+ users
- Amateur – 707 ever users; 535 monthly+ users
- Original Digital Video (Ad supported) – 626 ever users; 407 monthly+ users

1,907 persons were screened from a general population age 18+ sample for being monthly+ viewers of online video and “ever” users of either TV Online, Amateur or Original Digital Video

Due to robust sample sizes, analysis was performed on monthly+ users of each video type

Additionally, this year an augment of was added to the study to enable analysis of a total of 150 age 18+ monthly+ users of Original Digital Video who are Cord Cutters/Nevers

When?

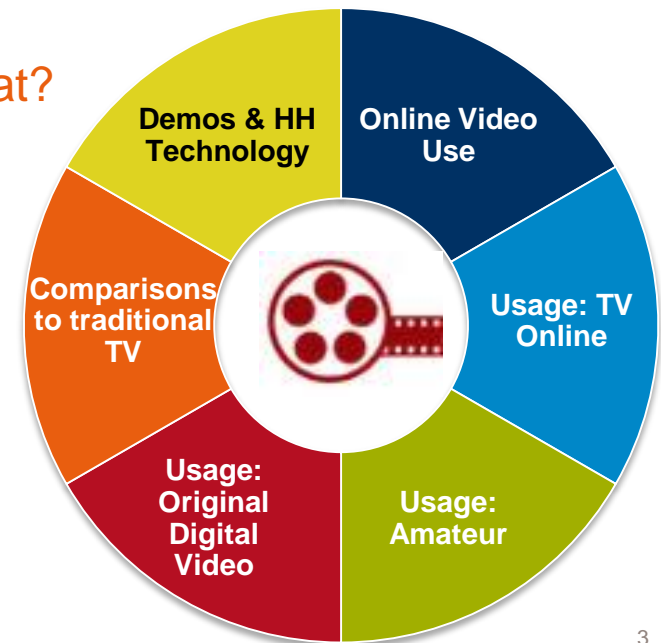
March 15 – 24, 2016

How?

Via a 17-minute online survey using GfK KnowledgePanel™

The cooperation rate among the assigned sample was 44%

What?



Defining the Streaming Video Types

Respondents who reported watching streaming video monthly+ were asked how frequently they watched each of the three video types on any device, with the video types defined as follows:

- **Original Digital Video** – originally produced online video – defined as professionally produced video only for ad-supported online distribution and viewing (not TV). The creators of this kind of video content can range from media companies (for example, Wall Street Journal Live News, Glamour Do's and Don'ts, etc.); online-only companies (for example Funny or Die, HowCast; or YouTube's Original Channels (The Onion, PewDiePie). Those who only watch non-ad supported Original Digital Video (Netflix or Amazon Original Series) were not included
- **TV Online** – Network TV shows online such as *Pretty Little Liars*, *The Walking Dead* or those found on sites like ABC.com, Hulu.com or HBO.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)
- *As part of the screening process, a list of 69 Original Digital Video shows and sites were shown in a separate question, and if any were selected by respondent they were considered an “ever” user of Original Digital Video. This allowed us to classify Original Digital Video users either on response to the definitional question or by their actual behavior*

Reading the Tables/Charts

Some of the following slides present data for TV Online, Amateur Video, and Original Digital Video side by side.

However, because of the way the questionnaire was structured, it is difficult to create data tabulations that automatically calculate statistical significance between the three groups, as well as in comparing data from previous years to 2016.

Given the sample sizes are the same order of magnitude (statistically speaking), the reader can safely use the following rules of thumb as far as significance:

- **For tables/charts showing % of monthly users**
 - differences of 5 percentage points or more can be considered significant (6 percentage points or more for Original Digital Video users 2015 vs. 2016)
- **For tables/charts showing means for monthly users**
 - differences of 0.6 or more can be considered significant (0.7 or more for Original Digital Video users 2015 vs. 2016)

Colored “+/-” numbers indicate significant differences from 2015 to 2016

Key Takeaway #1: Growth of the Original Digital Video Market Continues



The market size of monthly+ viewers of Original Digital Video among US adults 18+ has been steadily increasing over the last few years (from 45 million in 2013 up to approximately 63 million in 2016). The ODV viewership has seen a 9% increase in median household income (\$6000) year-over-year.

Younger adults age 18-34 are the driving force behind this evolution – particularly males and cord cutters/never. This population is also finding advertising to be more memorable in this format than a year ago.



Unlike TV online and amateur video, which have been flat year over year, Original Digital Video continues its steady growth to provide an alternative form of entertainment that more adults are turning to. This format is also proving to provide a captivating and memorable environment for advertising.



Advertising within the Original Digital Video medium should be considered in all campaigns. It has the potential to reach a growing audience and many of which may not be accessible through regular TV.

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Key Takeaway #2: Original Digital Video Beats Regular TV Among Viewers



Among ODV viewers, perceptions of Original Digital Video continue to outshine regular TV, with more positive ratings on being *innovative, young, for anywhere, and unique*. Reasons for watching ODV are dominated by the ability to watch on the viewer's *own schedule*, while *unique content not available anywhere else* is a growing factor.



In 2016, Original Digital Video has overtaken Primetime TV for the first time as the type of video monthly+ ODV viewers are most likely to watch. ODV is particularly preferred over Primetime TV for its flexible viewing times according to viewers of both types of video.



Original Digital Video should be an important part of the media mix. It provides a valuable and viable content environment for brand advertising and connects brands to audiences anytime anywhere.

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Key Takeaway #3: Original Digital Video is Becoming More Ingrained



More viewers of Monthly+ Original Digital Video report they have preferred sites than a year ago. ODV viewers on Connected TVs have continued to decrease time spent watching regular TV. Half of those who watch ODV on connected TV during primetime say they are watching it more than a year ago. The top reasons for streaming ODV are that it has become more of a habit and the quality of ODVs has improved.



Original digital video viewing is becoming more and more habitual, and ODV viewing on Connected TV is set to continue to grow and capture increasing time spent.



With the perceived quality of Original Digital Video now more positive than regular TV and ODV increasingly becoming part of the regular media consumption mix among viewers, there is opportunity to invest in this platform to capture a halo effect.

Key Takeaway #4: The Social Media Wildfire



Word-of-mouth and social media are the top ways Original Digital Video viewers discover new content, particularly young women.

More than half of Original Digital Viewers have social media interactions, however compared to a year ago, activities such as following shows/producers, clicking links and discovering ODV on social media have decreased.



With the internet at our fingertips and social media a ubiquitous voice across platforms like Facebook and Twitter, “going viral” is a barometer of success.



Enhance the share-ability and discoverability of Original Digital Video within the social media environment when creating any sort of original content or advertising.

Key Takeaway #5: Original Digital Video Important for Cord Cutters/Nevers



Cord Cutters/Nevers age 18+ are much more likely to watch Original Digital Video vs. Gen Pop, which is not surprising since streaming video played a significant role in their decision to cancel/not have pay TV.

Perceptions of ODV are very similar between Cord Cutters/Nevers and general ODV viewers. The disparity becomes evident, however, in their more negative opinions of regular TV, finding it *boring* and *not worthwhile*.



As a new generation of Americans is less likely to pay for TV, Original Digital Video can provide a highly appealing form of entertainment and a more receptive environment to brand advertising.



Marketers need to consider that they may be missing an entire segment of consumers if they only use traditional media platforms. Inclusion of Original Digital Video in any media mix can help ensure that this younger audience is reached.

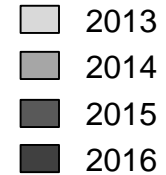
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Sizing the Market

Sizing the Market Among the General Population

- Approximately **63 million[†] American adults view Original Digital Video** on a monthly basis, a number that has been steadily growing since 2013 ([†]26% * 241.2M US adults)
- Monthly viewing of TV Online and Amateur video is flat year over year

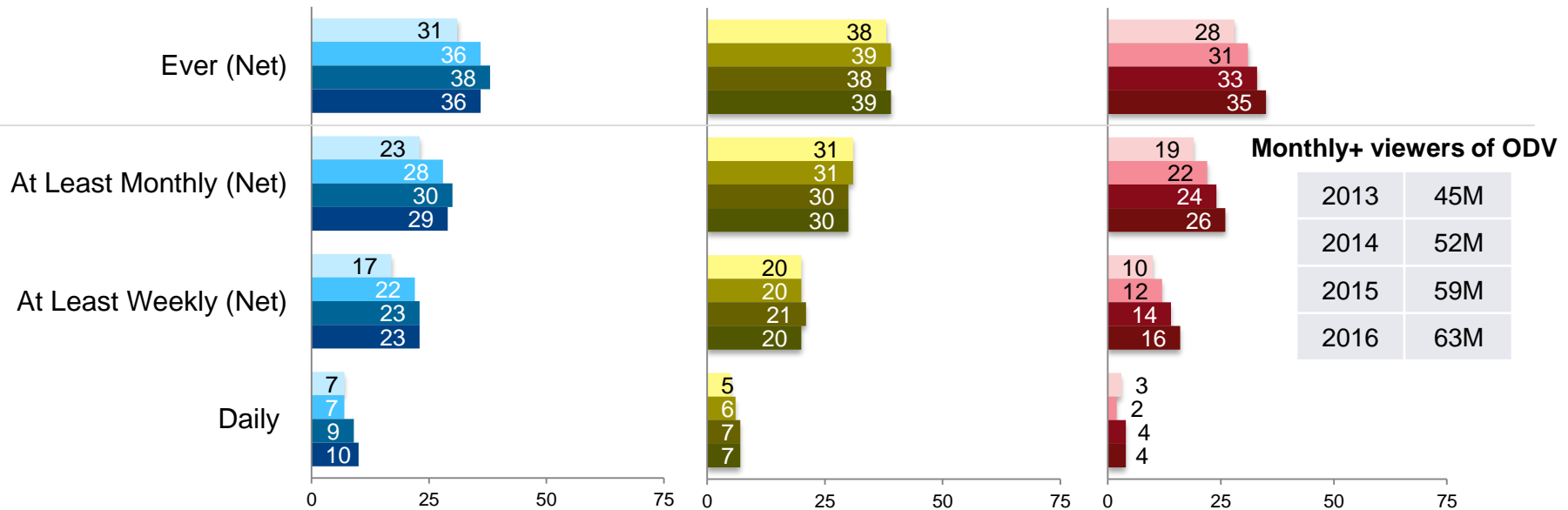
Usage of Streaming Video Types – Adults 18+ –



TV Online

Amateur

Original Digital Video



S4a/b/c. About how often do you watch [TV shows online/amateur video online/original digital video] using any device (computer, smartphone, tablet, Internet-connected TV)?

S5. Have you ever watched any of the following original digital video shows or visited their sites below?

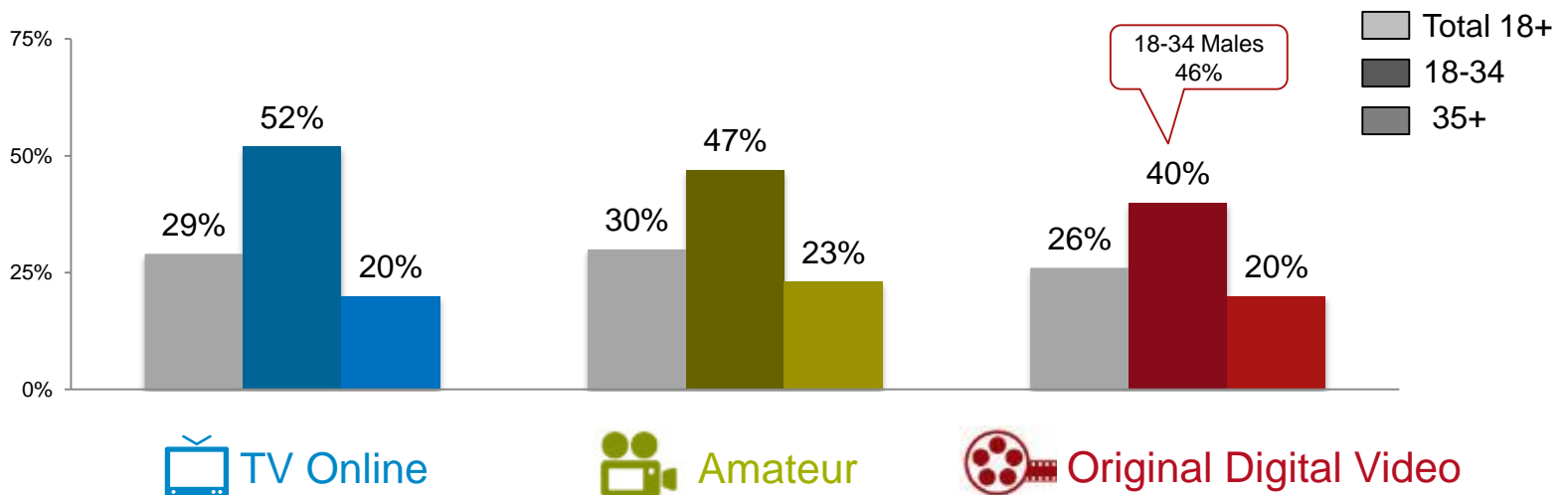
Base: Total Respondents 18+ (2013/2014/2015/2016) (N=2,425/2,388/1,929/1,903)

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Monthly Video Streaming by Age

- Younger adults (18-34) are twice as likely as adults 35+ to watch Original Digital Video on a monthly basis, driven by males 18-34
- The 18-34 group is also more likely to watch TV Online and Amateur video

2016 Monthly+ Usage of Streaming Video Types – Age 18-34 vs. Age 35+ –



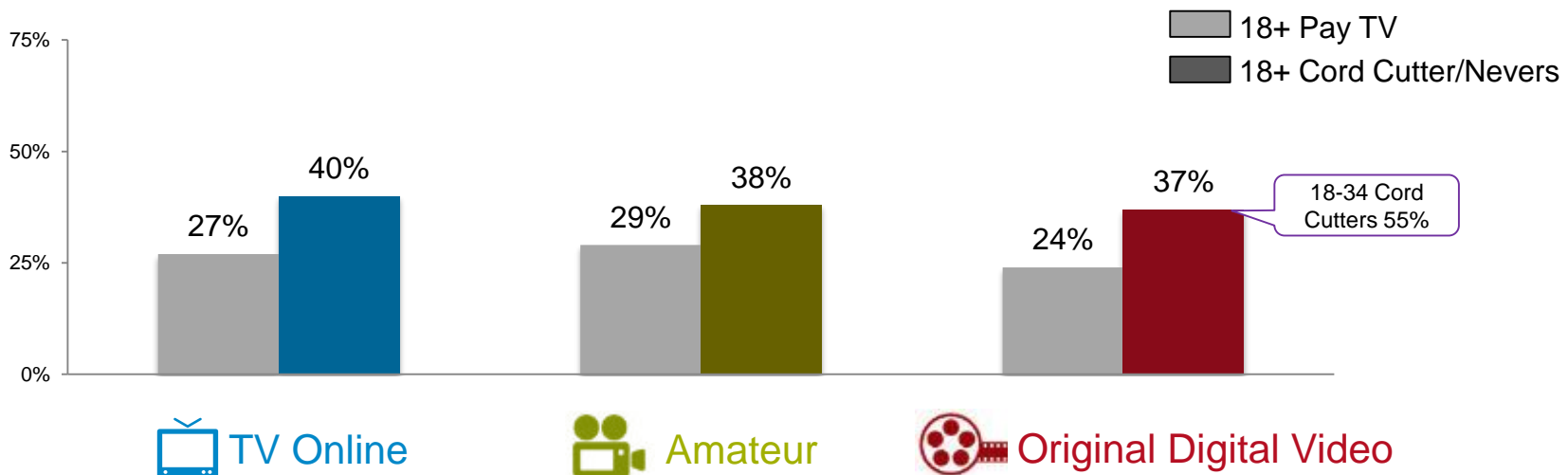
S4a/b/c. About how often do you watch [TV shows online/amateur video online/original digital video] using any device (computer, smartphone, tablet, Internet-connected TV)?
Base: 2016 Total Respondents 18+/18-34/35+ (N=1,903/405/1,498)

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Monthly Video Streaming by Pay TV Status

- Cord Cutters/Nevers are more likely than Pay TV subscribers to stream video overall – particularly TV Online and Original Digital Video
- More than half of 18-34 Cord Cutters/Nevers watch Original Digital Video at least monthly

2015 Monthly+ Usage of Streaming Video Types – Adults 18+ Pay TV vs. Cord Cutters/Nevers –



S4a/b/c. About how often do you watch [TV shows online/amateur video online/original digital video] using any device (computer, smartphone, tablet, Internet-connected TV)?
Base: 2016 Total Respondents 18+ Pay TV/18+ Cord Cutters/Nevers (N=1,486/485)

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

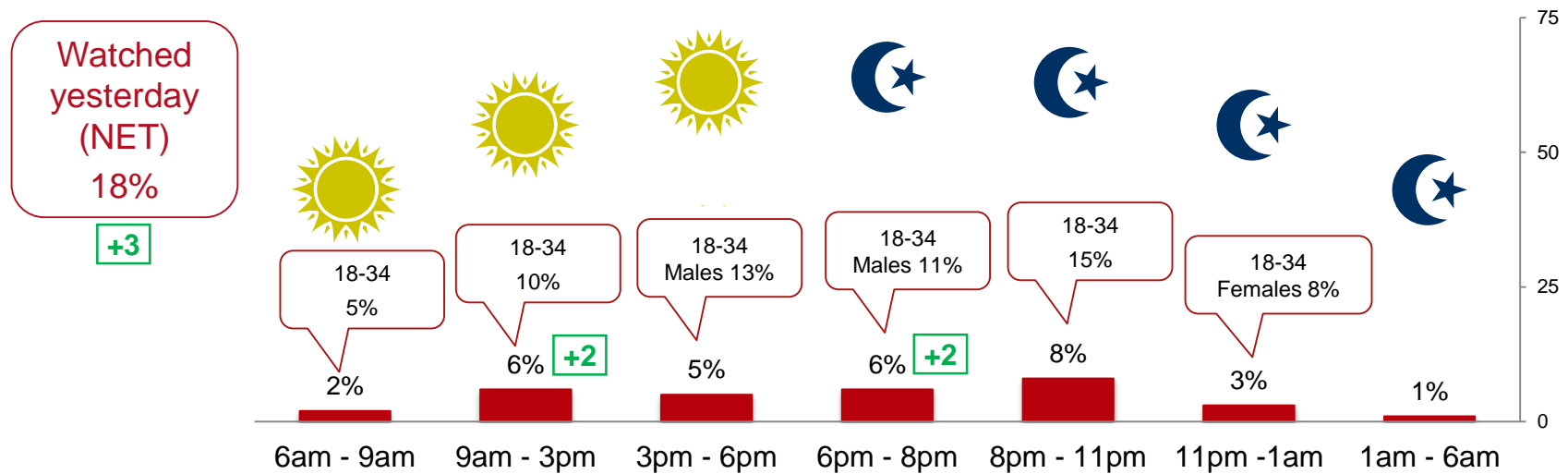
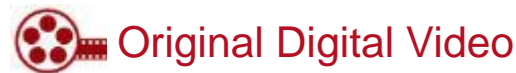
Original Digital Video Viewers Streaming Behavior

Original Digital Video Use by Daypart (yesterday)

- Nearly one in five adults age 18+ streamed Original Digital Video “yesterday,” which is equal to about 43.4 million American adults (18% * 241.2 million US adults)
- As expected, usage peaks during primetime, but daytime and early evening streaming is slightly up from a year ago

Yesterday Streaming Video Types By Daypart

– Adults 18+ –



Q13. Now, thinking only of yesterday, during which of these time periods did you watch original digital video online? Please think of all your online viewing, in any location using any device.

Base: Total Respondents 18+ (2015/2016) (N=1,929/1,903)

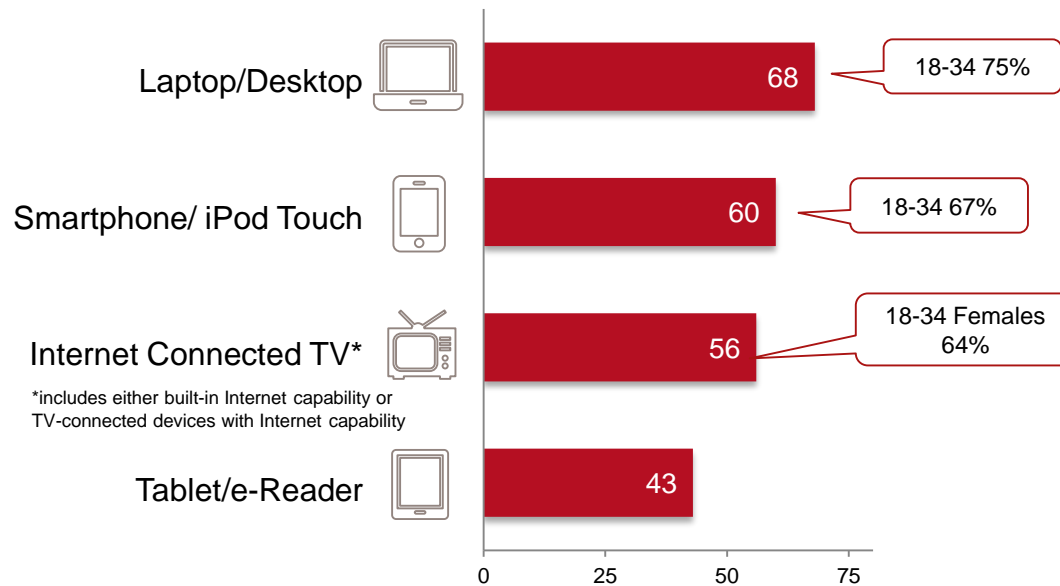
Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Devices Used to Stream Original Digital Video

- Computers continue to be used most often by Monthly+ Original Digital Video viewers
- Usage of Internet Connected TV and smartphone/iPod Touch for Original Digital Video viewing are especially prevalent among younger adults

Devices Used Monthly+ to View Original Digital Video

– Monthly+ Users of Original Digital Video –



Q22. How often do you use each device to watch original digital video?

Base: Viewer of Original Digital Video (2016) (n=407)

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

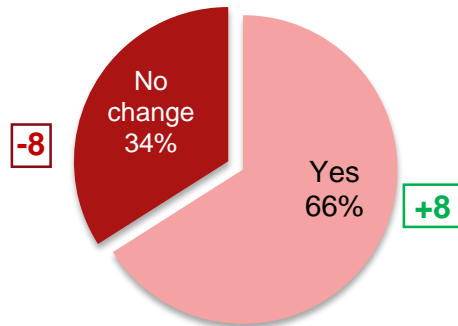
Connected TV Deep Dive Among ODV Viewers

- More viewers of Monthly+ Original Digital Video on Connected TVs have reduced the time watching regular TV compared to a year ago due to ODV viewing
- Primetime remains the most popular time for viewing ODV on Connected TVs, viewing from 3-8 pm is increasing

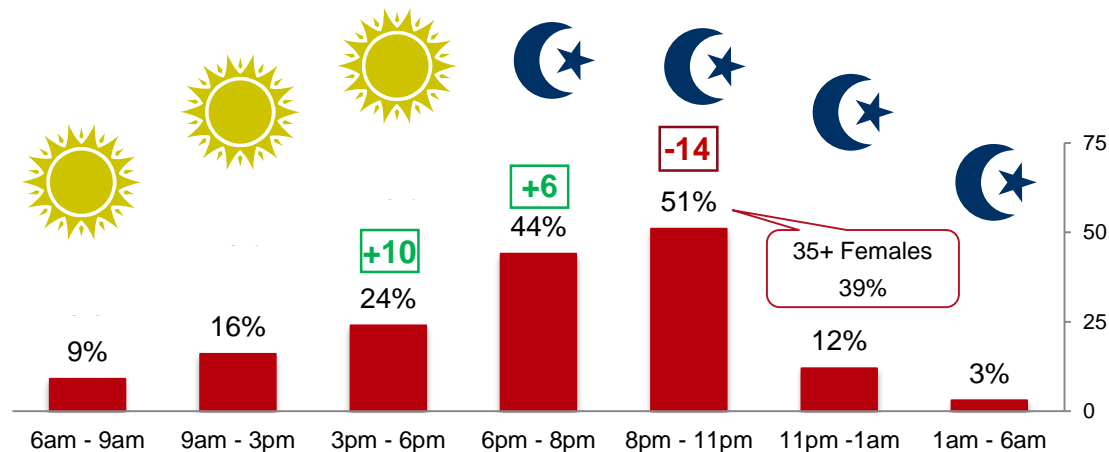
Connected TV Viewing Behavior – Monthly+ Viewers of Original Digital Video on Connected TV –



Has Viewing Original Digital Video on Connected TV Reduced Your 'Regular TV' Watching Time?



Dayparts Original Digital Video Viewed on Connected TV



Q22g. Do you think your viewing of original digital video streamed on connected TVs has reduced the time you watch programs on regular TV in the past year?

Q22h. In a typical week, which of these times do you typically watch original digital video streamed to a connected TV?

Base: Uses connected TV to watch ODV at least monthly (2015/2016) (n=202/221); Cord Cutters/Nevers 18-34: ODV Mo.+ Users (2015/2016) (n=88/45^)

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Connected TV Deep Dive Among ODV Viewers

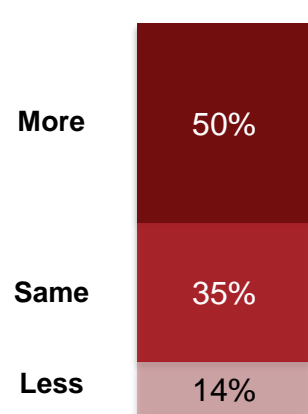
- One-in-two viewers of Monthly+ Original Digital Video on Connected TVs during primetime believe they are watching more ODV than a year ago
- Top reasons are streaming ODV has become more of a habit and the quality of ODV has improved; both significantly higher than 2015 (up 10 and 13 percentage points, respectively)

Connected TV Primetime Viewing Behavior

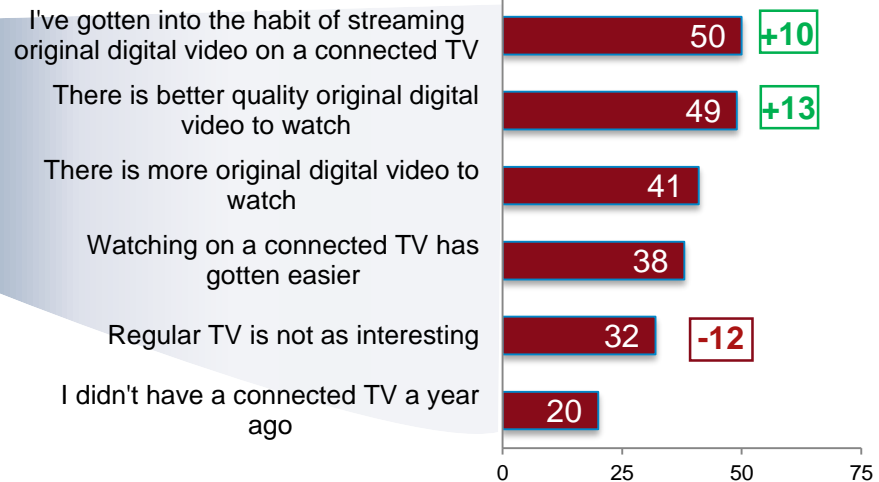
– Monthly+ Viewers of Original Digital Video on Connected TV 8pm-11pm –



Original Digital Video Viewed on Connected TV From 8pm-11pm vs. Year Ago



Reasons Watching More[^]



Q22i. Do you feel you are watching more original digital video on a connected TV set during primetime (8PM to 11PM) than a year ago?

Base: Uses connected TV To watch ODV in primetime 8pm-11pm (2015/2016) (n=127/122)

Q22j. You said you are viewing more original digital video on a connected TV during primetime (8-11pm) than a year ago. Why is that?

Base: Viewing ODV on a connected TV more in primetime (2015/2016) (n=73/64)

[^]caution: small base

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Original Digital Video Experience

Likes and Satisfaction

- TV Online Viewers have the highest satisfaction with their viewing experience, with “the ability to watch on my own schedule” remaining the top benefit; the remaining positives have to do with the inherent functionality of online TV viewing
- Amateur Viewers like the “funny or humorous” nature of this video type most
- Viewers of ODV like to “watch on my own schedule” and find the content “interesting”

Like Best About Viewing Experience – Top 5 – Monthly+ Users of Video Type –

TV Online	%	Amateur	%	Original Digital Video	%
Ability to watch on my schedule*	70	Funny/Humorous	62	Ability to watch on my schedule	57
Ability to pause/start /stop anytime	61	Fun/Entertaining/Enjoyable**	55	Interesting	43
Ability to watch old episodes/reruns	59	Shortness of videos	42	Ability to watch multiple episodes in one sitting*	43
Ability to choose programs/shows	57	Interesting**	40	Fun/Entertaining/Enjoyable**	42
Ability to watch multiple episodes in one sitting**	57	Ability to watch on my schedule	40	Funny/Humorous**	36
Very/somewhat satisfied watching this way*	78	Very/somewhat satisfied watching this way*	68	Very/somewhat satisfied watching this way*	73

*not asked in 2015 **wording change from 2015

Q14a/b/c. Overall, what do you like best about the experience of watching [video type]?

Base: Viewer of ... (2015/2016) TV shows online (n=527/509), Amateur (n=551/535), Original Digital Video (n=371/407)

Q14d. Overall, how satisfied are you with watching each of the following types of online video?

Base: Viewer of...TV shows online (n=509), Amateur (n=535), Original Digital Video (n=407)

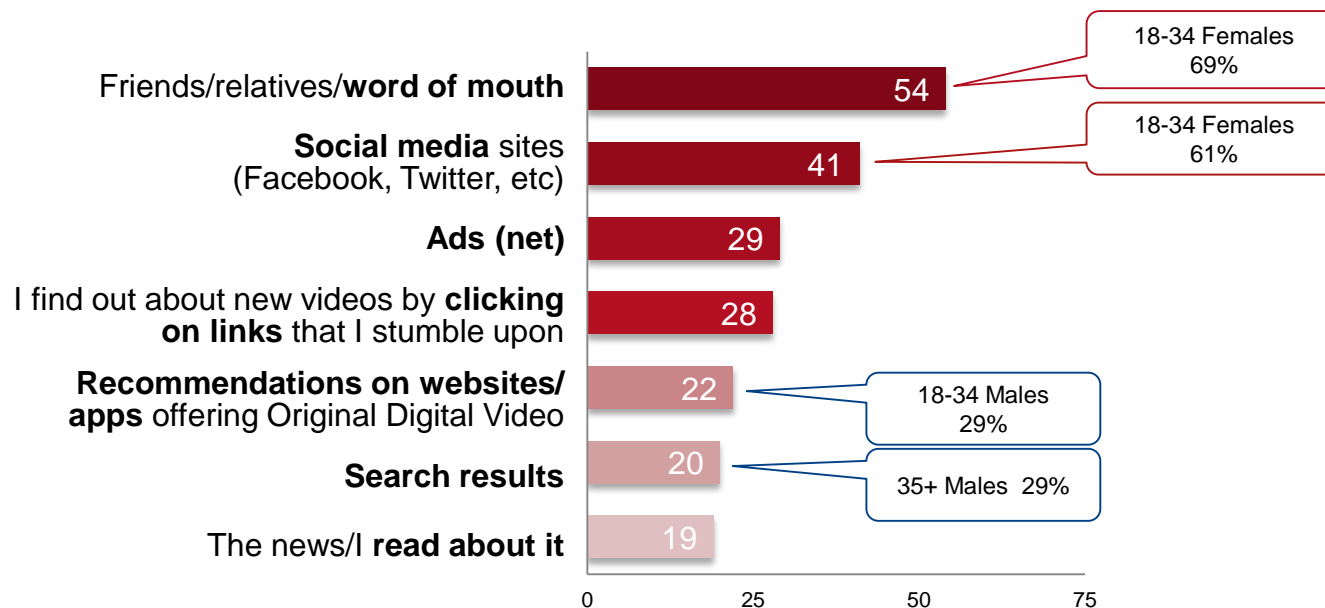
Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Original Digital Video Discovery Sources

- Monthly+ Original Digital Video viewers consistently discover Original Digital Video through word of mouth and social media
- Females tend to rely more on WOM and social media for ODV discovery, while males are more likely to turn to recommendations and search

Top Ways Learn About Original Digital Video

– Monthly+ Users of Original Digital Video –



Q23. In which ways do you learn about original digital video?
Base: Viewer of Original Digital Video (2015/2016) (n=371/407)

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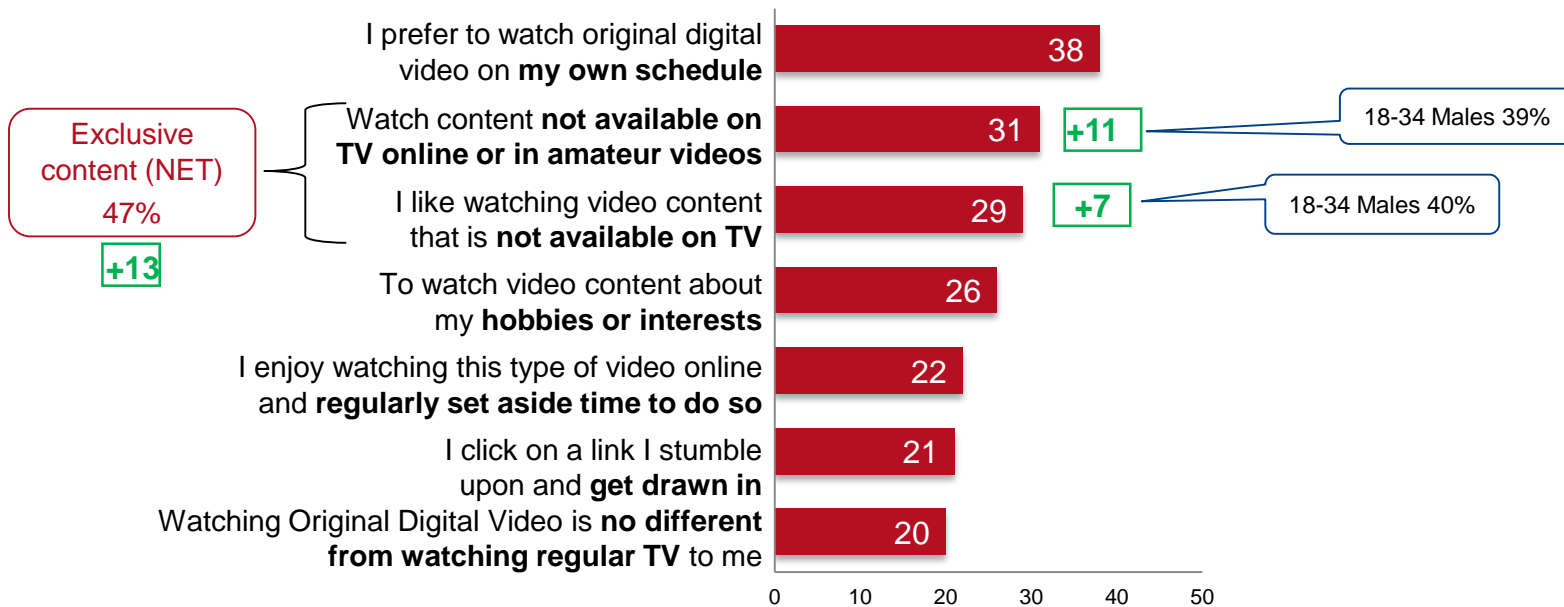
+/- indicates >5 percentage points higher/lower than 2015

Reasons for Watching Original Digital Video

- Flexibility and exclusivity of Original Digital Video content are the top viewing drivers
- The appeal of exclusivity and originality is particularly strong among 18-34 males

Top Reasons for Watching – Original Digital Video

– Monthly+ Users of Original Digital Video –



Q25. And for what reasons do you usually watch original digital video? Select all that apply.

Base: Viewer of Original Digital Video (22015/2016) (n=371/407)

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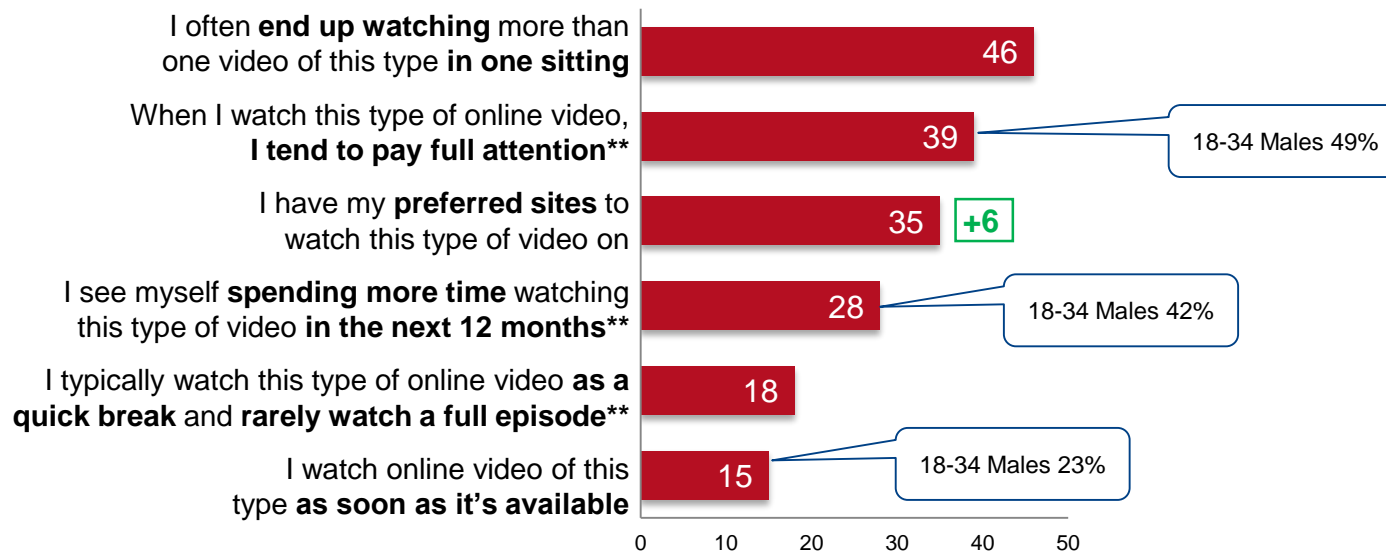
+/- indicates >5 percentage points higher/lower than 2015

Statements About Original Digital Video

- Binge viewing of Original Digital Video is stable, ceasing the annual increases seen since 2013 (46% in 2015, 40% in 2014 and 32% in 2013)
- ODV viewers have increasingly established their go-to sites for this type of video
- 18-34 males are more likely to pay full attention and spend more time with Original Digital Video

Statement Agreement About Original Digital Video

– Monthly+ Users of Original Digital Video –



**not asked in 2015

Q26. Thinking about when you watch original digital video, which of the following statements do you agree with? Select all that apply.

Base: Viewer of Original Digital Video (2015/2016) (n=371/407)

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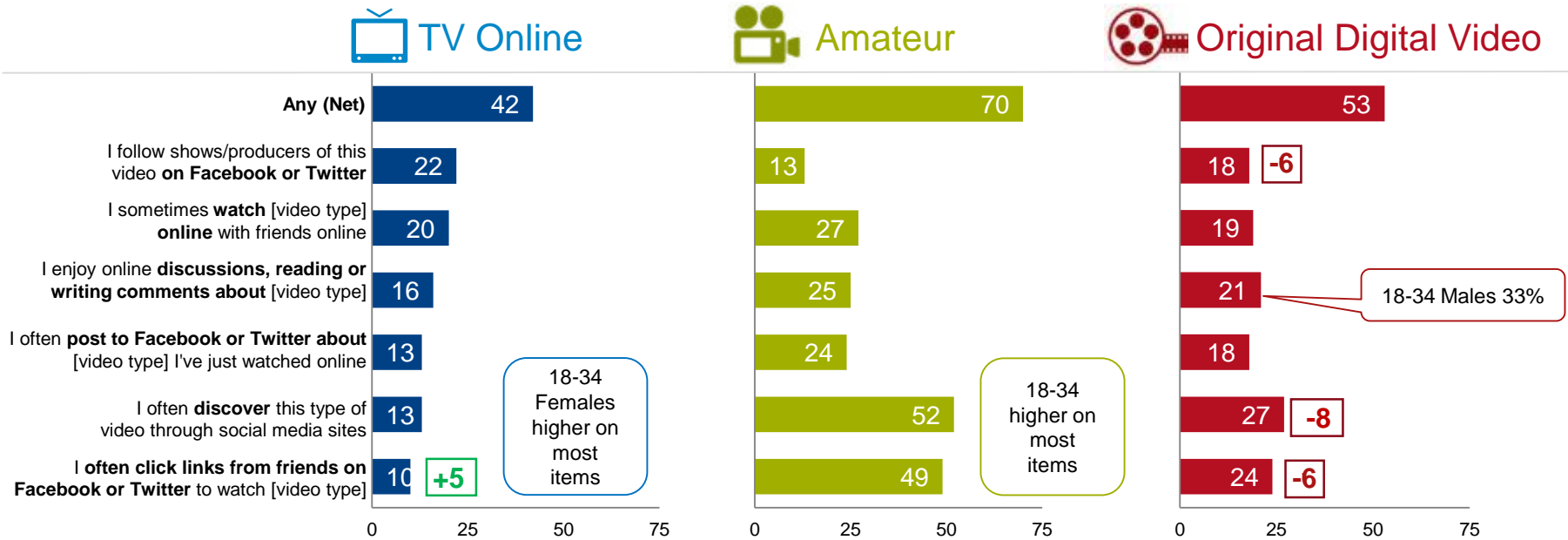
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+/- indicates >5 percentage points higher/lower than 2015

Social Media Interaction By Online Video Type

- Social media interaction is most apparent among monthly+ viewers of Amateur Video
- More than half of ODV monthly+ viewers interact with social media; 18-34 males are more active in online discussions
- TV Online generates the least interaction with social media overall, but is experiencing an uptick in clicking on links from friends

Social Media Use – Monthly+ Users of Video Type –



Q11. How do you interact in social media with each type of online viewing listed?

Base: Viewer of ... (2015/2016) TV shows online (n=527/509), Amateur(n=551/535), Original Digital Video (n=371/407)

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

+/- indicates >4 percentage points higher/lower than 2015 (>5 pp for Original Digital Video)

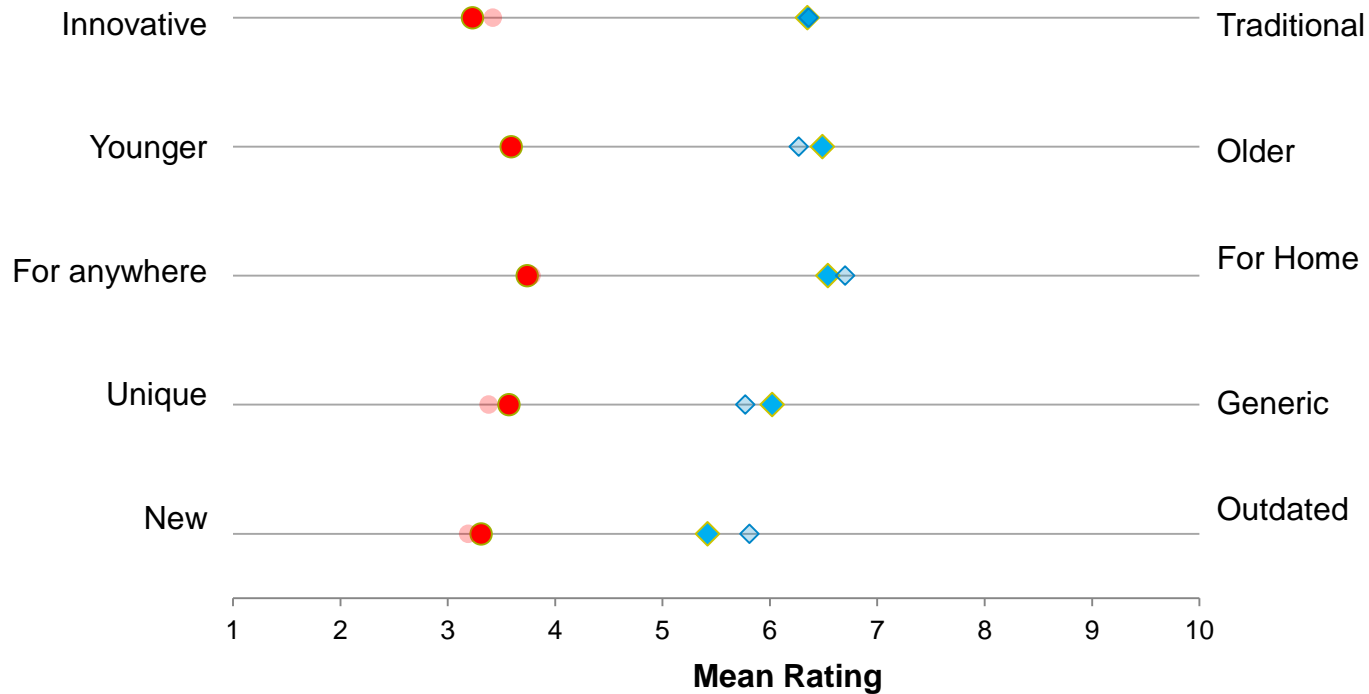
Original Digital Video vs. Regular TV

Image Comparison Among ODV Viewers – Most Different



- The positive perceptions of Original Digital Video stay strong and stable year over year, with ODV continuing to outshine regular TV

Image of Regular TV vs. Original Digital Video – Monthly+ Users of TV and Original Digital Video –



● Original Digital Video (2016) ◆ Regular Television (2016) ● Original Digital Video (2015) ◆ Regular Television (2015)

Q40. And, in your opinion, where does your image of each of these fall on the following scale ... closer to the word on the left; closer to the word on the right; or somewhere in-between?

Base: Original Digital Video and Regular TV Viewer (2015/2016)(n=302/328)

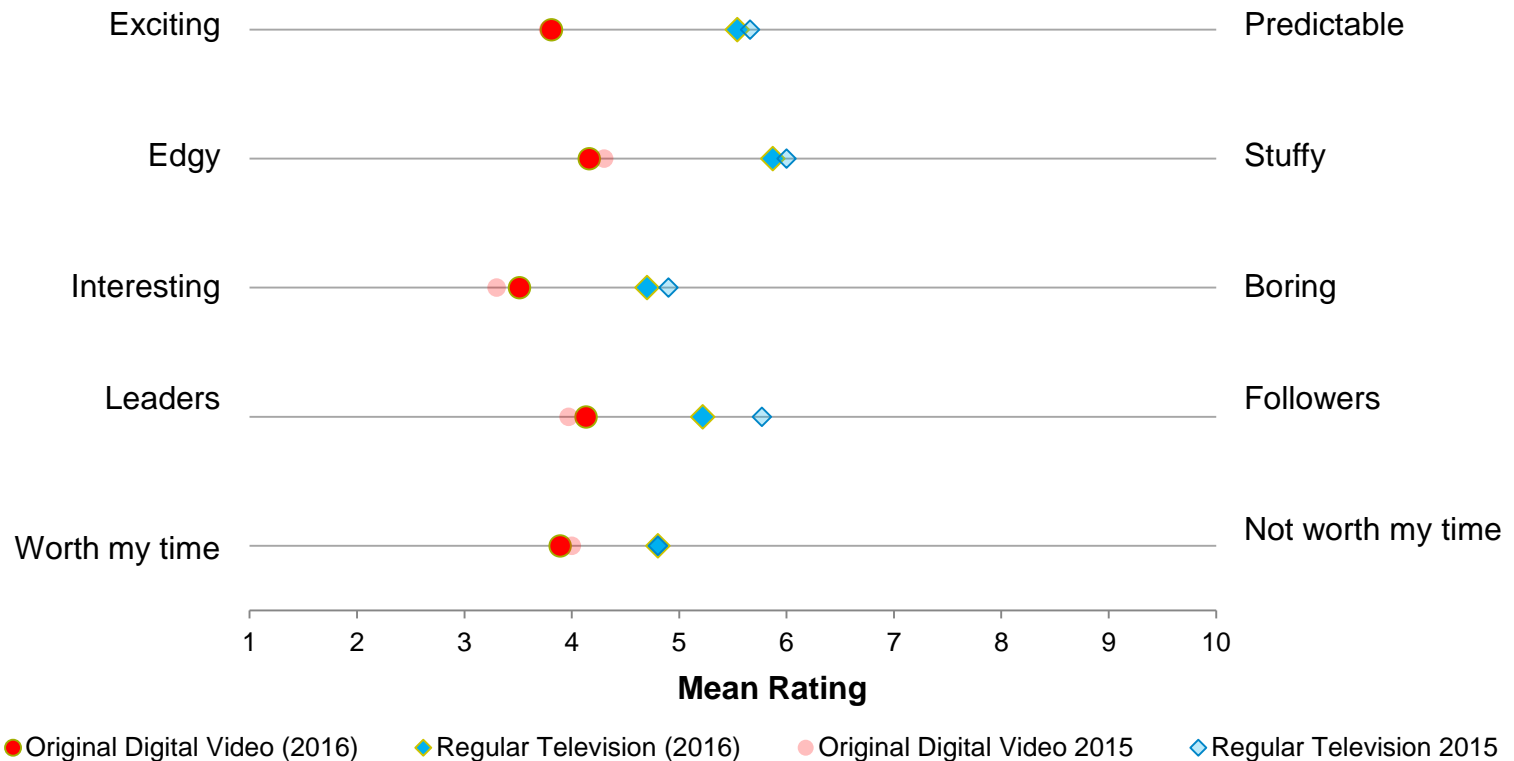
Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Image Comparison Among ODV Viewers – More Similar



- Original Digital Video continues to lead the “exciting” and “edgy” imagery, though regular TV catches up slightly on being “interesting” and “leaders”

Image of Regular TV vs. Original Digital Video
– Monthly+ Users of TV and Original Digital Video –



Q40. And, in your opinion, where does your image of each of these fall on the following scale ... closer to the word on the left; closer to the word on the right; or somewhere in-between?

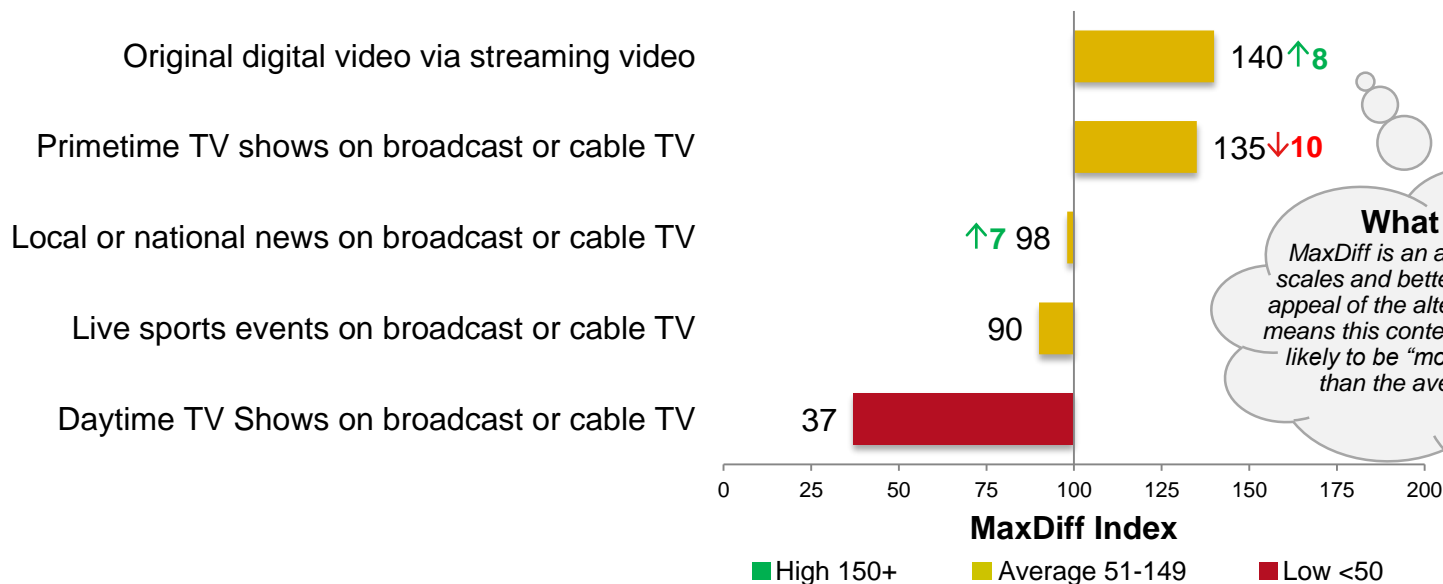
Base: Original Digital Video and Regular TV Viewer (2015/2016)(n=302/328)

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Perceptions Among ODV Users

- Original Digital Video leads the varied types of video content as most likely to watch among Monthly+ ODV Users; Increasing from 2015 level and now surpassing Primetime TV
- News on broadcast/cable TV improves likely due to the election coverage

Video Most Likely to Watch – Monthly+ Users of Original Digital Video –



↑ ↓ shows change in index points from 2015

Q41. Choose the type of video you would be **most likely** to watch, and which one you would be **least likely** to watch...

Base: Monthly+ Viewers of Original Digital Video (2015/2016) (n=367/400)

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

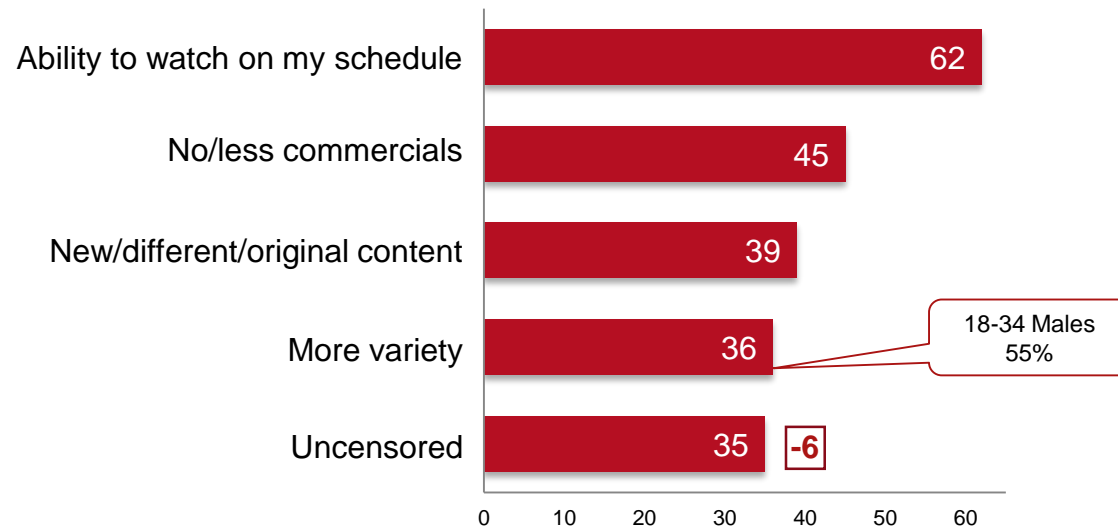
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Original Digital Video vs. Primetime TV

- Viewers of both Primetime TV and Original Digital Video point to flexible viewing times as ODV's main advantage over primetime TV; 18-34 males especially value more variety
- Uncensored material is less of a differentiator than last year



What Like Better About Original Digital Video over Primetime TV - Monthly+ Users of Original Digital Video and Primetime TV -



Q49. Lastly for this section, you told us that you watch both original digital video as well as primetime shows on regular TV. Comparing those, what do you like better about original digital video content when compared with primetime TV shows?

Base: Viewer of ... Original Digital Video and Primetime TV (2015/2016)(n=245/246)

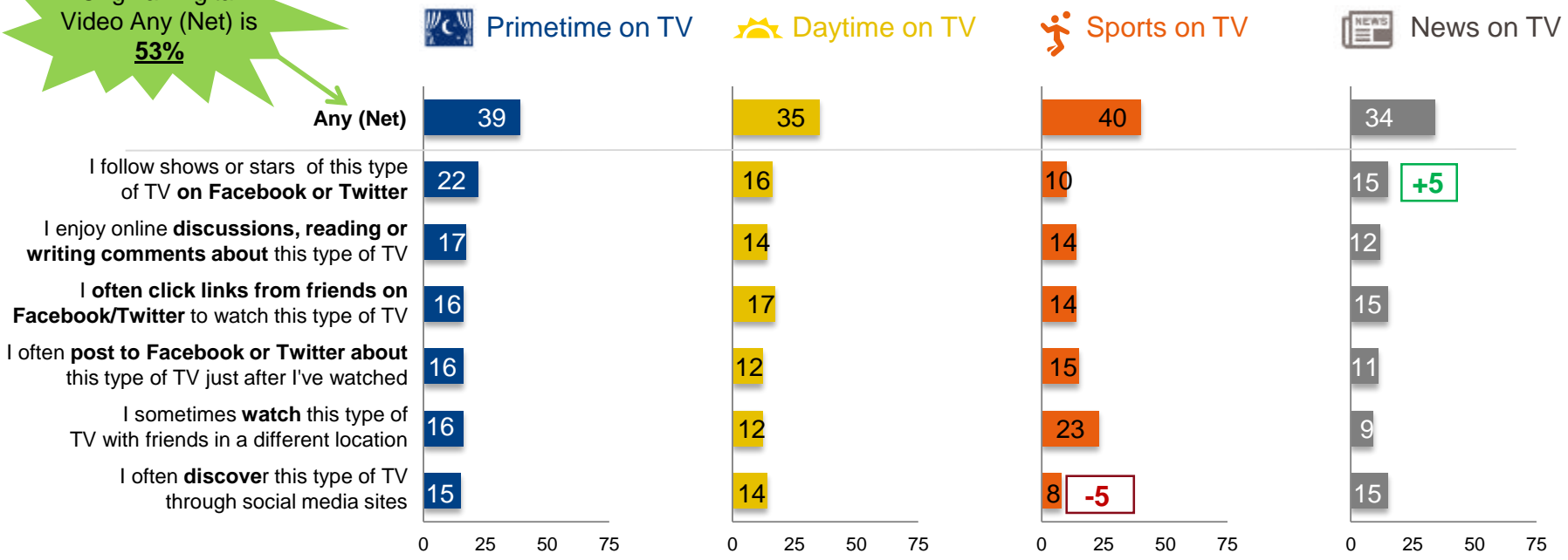
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Social Media Interaction By Type Of TV Programming

- Social media behavior by TV program type is generally stable from a year ago, and is slightly more likely to occur with Primetime and Sports viewing
- Viewers are following News shows on Facebook or Twitter more compared with 2015 likely due to the upcoming US elections

Original Digital Video Any (Net) is **53%**

Social Media Use – Monthly+ Users of TV Type –



+/- indicates >4 percentage points higher/lower than 2015

Q32. How do you interact in social media with each type of TV program listed?

Base: Viewer of ... (2015/2016) Primetime on TV (n=579/534), Daytime on TV (n=244/256), Sports on TV (n=450/397), News on TV (n=566/573)

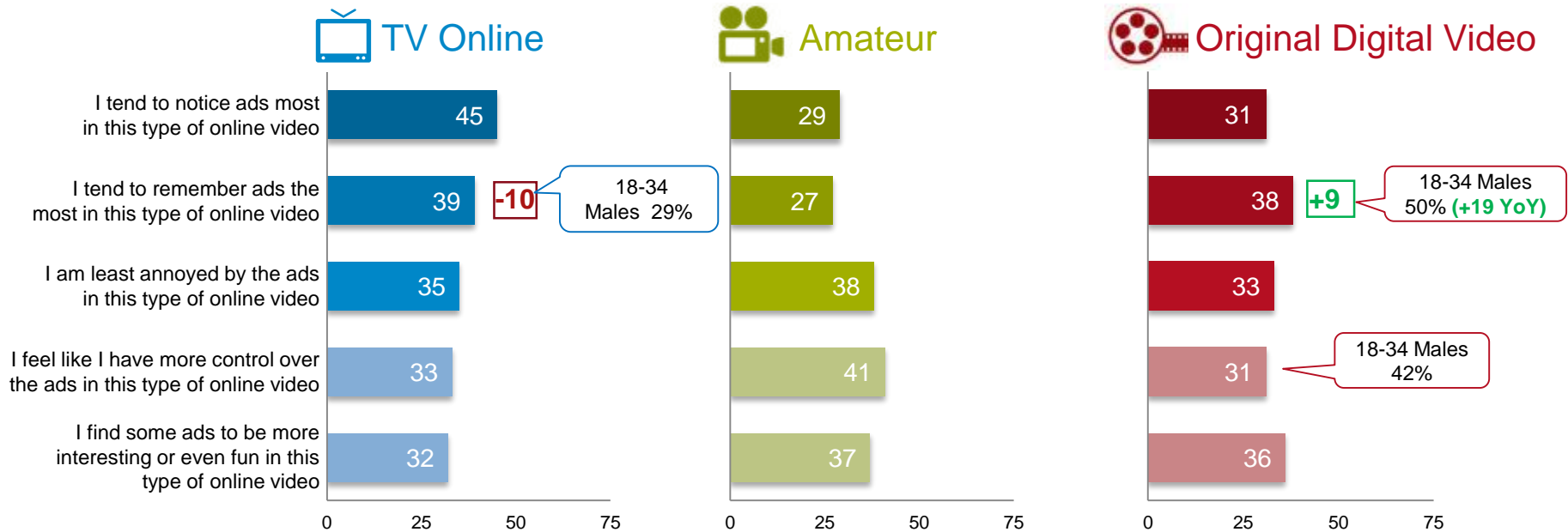
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Reactions to Ads

Reactions To Ads By Online Video Type

- Ads in Original Digital Video are more memorable to its viewers than a year ago, now on par with ads in TV Online
- 18-38 male viewers of Original Digital Video are more likely to remember ads in ODV than a year ago

Ad Statement Association – Monthly+ Users of Video Type –



+/- indicates >4 percentage points higher/lower than 2015 (>5 pp for Original Digital Video)

Q12. Which type of online viewing listed best matches each statement?

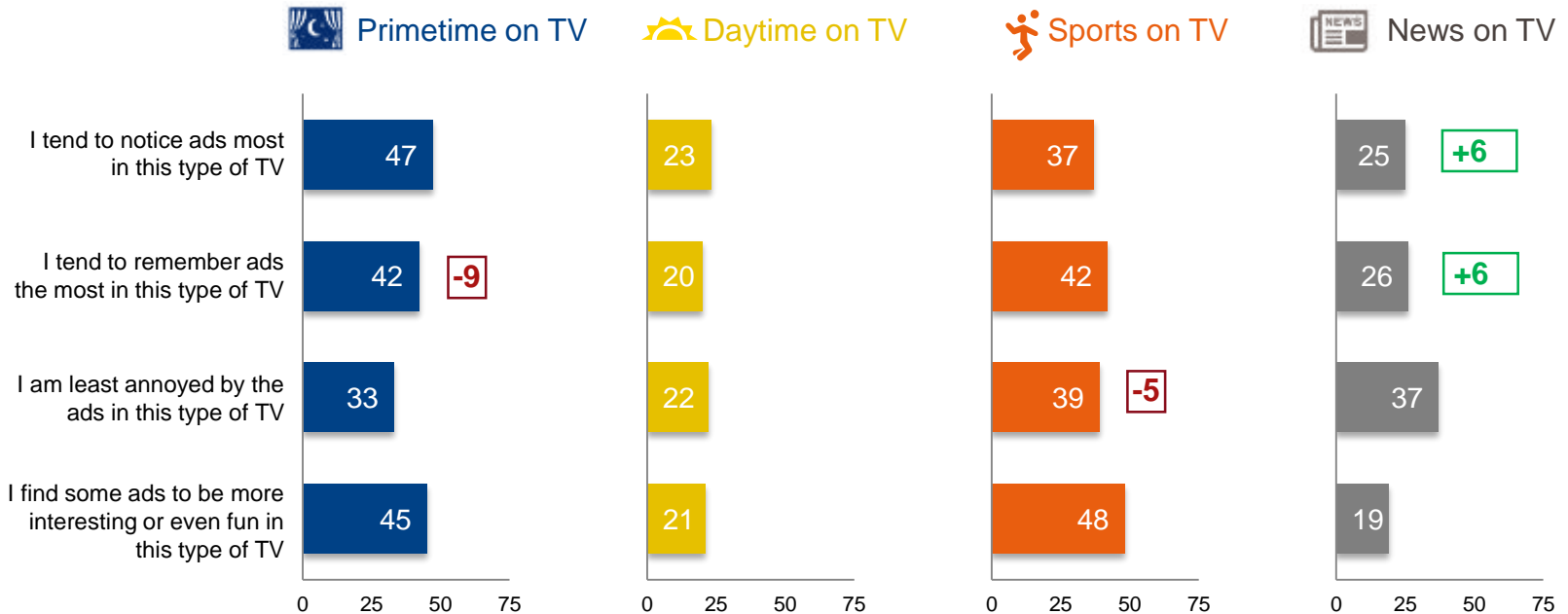
Base: Viewer of at least two of the video types... (2015/2016) – TV shows online (n=527/509), Amateur Online (n=551/535), Original Digital Video (n=371/407)

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Reactions To Ads By Type Of TV Programming

- For Primetime TV Viewers, ads are less memorable than a year ago, with News Viewers gaining momentum
- Sports Viewers continue to have a slight edge on finding ads to be more interesting/fun and less annoying, but the latter perception has decreased

Ad Statement Association – Monthly+ Users of TV Type –



+/- indicates >4 percentage points higher/lower than 2015

Q33. Which type of TV program listed best matches each statement?

Base: Viewer of at least two TV types... (2015/2016)– Primetime TV (n=533/491), Daytime TV (n=242/254), Live TV sports (n=414/362), TV news (n=530/525)

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

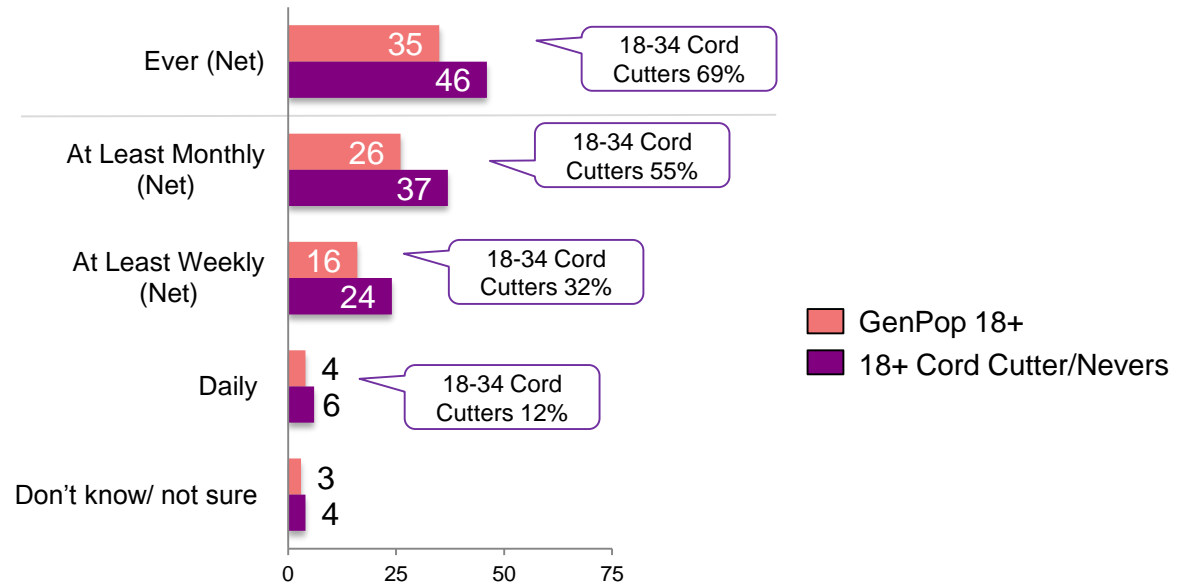
Highlights: Cord Cutters/Nevers Deep Dive

GfK interviewed a sample augment of 150 monthly+ users of Original Digital Video who are also pay TV Cord Cutters/Cord Nevers, age 18+

Sizing the Market

- Cord Cutters/Nevers, particularly 18-34 years, are much more likely than the general population to watch Original Digital Video

Usage of Original Digital Video – Total Respondents Screened –



S4c. About how often do you watch original digital video using any device (computer, smartphone, tablet, Internet-connected TV)?

Base: Total Respondents (GenPop 18+, Cord Cutter/Nevers 18+) (N=1,903, 485)

Letter indicate significantly higher than comparison group at 95%

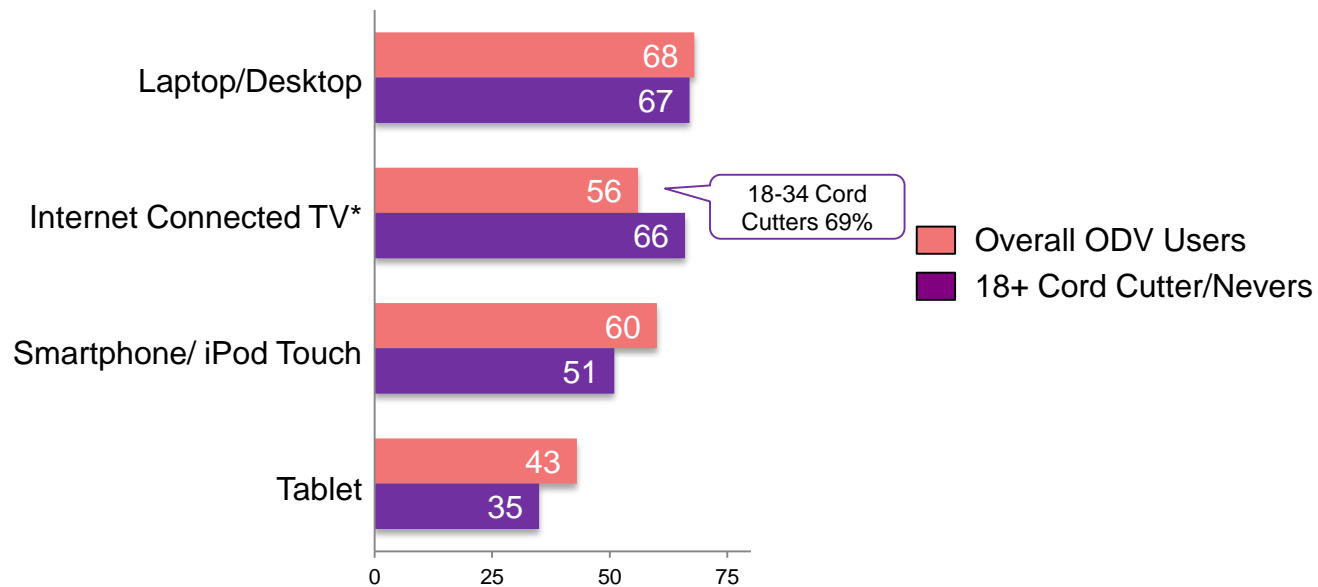
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Devices Used to Stream Original Digital Video

- Internet Connected TV is more popular among Cord Cutters/Nevers to watch Original Digital Video

Devices Used Monthly+ to View Original Digital Video

– Monthly+ Users of Original Digital Video –



Q22. How often do you use each device to watch original digital video?
 Base: Viewer of Original Digital Video (GenPop 18+, Cord Cutter/Nevers 18+) (N=407, 150)
 Letter indicate significantly higher than comparison group at 95%

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

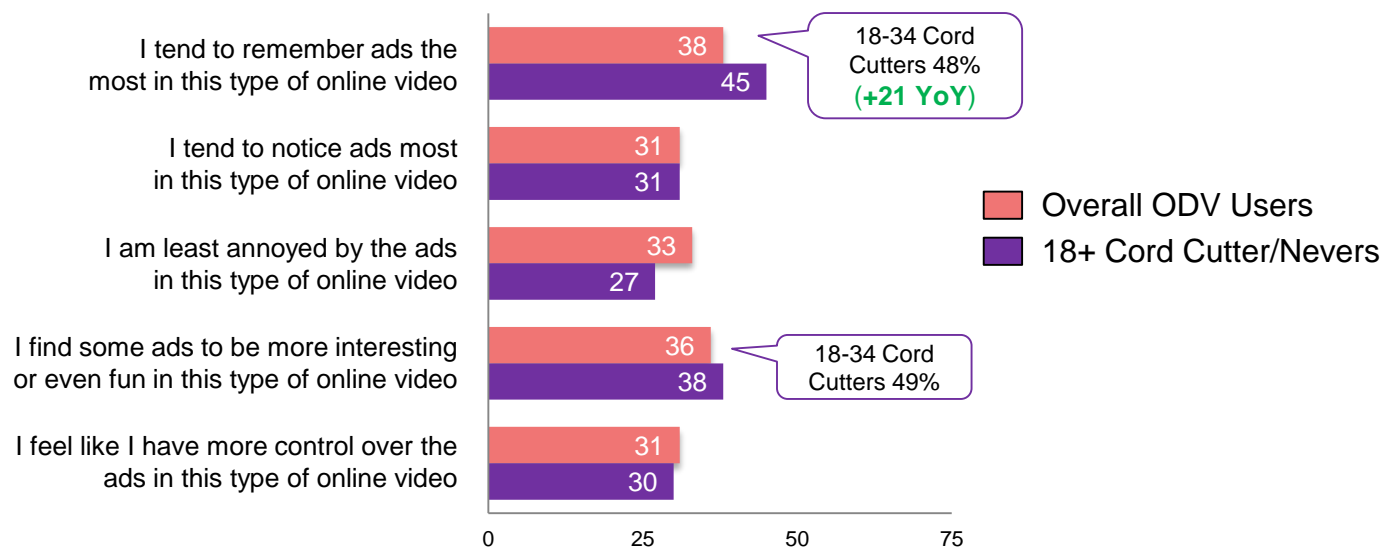
*includes either built-in Internet capability or TV-connected devices with Internet capability

Reactions To Ads In Original Digital Video

- ODV viewers who are Cord Cutters/Nevers, especially 18-34 years, find ads in Original Digital Video more memorable and interesting; they are more tolerant and less annoyed by ads in ODV

Ad Statement Association – Monthly+ Users of Original Digital Video –

Original Digital Video



Q12. Which type of online viewing listed best matches each statement?

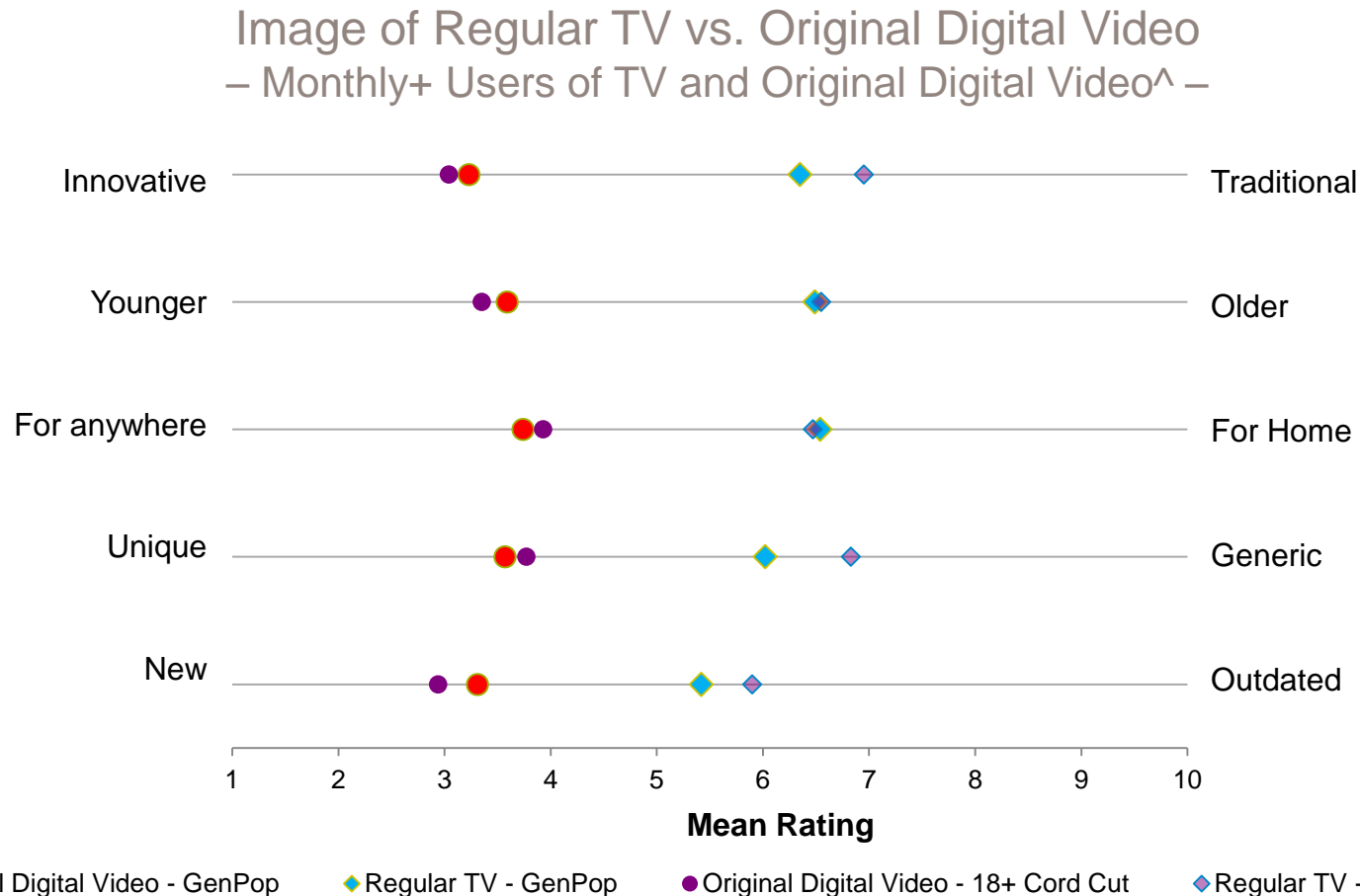
Base: Viewer of at least two of the video types... (GenPop 18+, Cord Cutter/Nevers 18+) (N=407, 150)

Letter indicate significantly higher than comparison group at 95%

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Image Comparison – Most Different

- Attitudes towards Original Digital Video are very similar between Cord Cutters/Nevers and overall ODV viewers, with “innovative” and “younger” differentiating ODV from regular TV the most



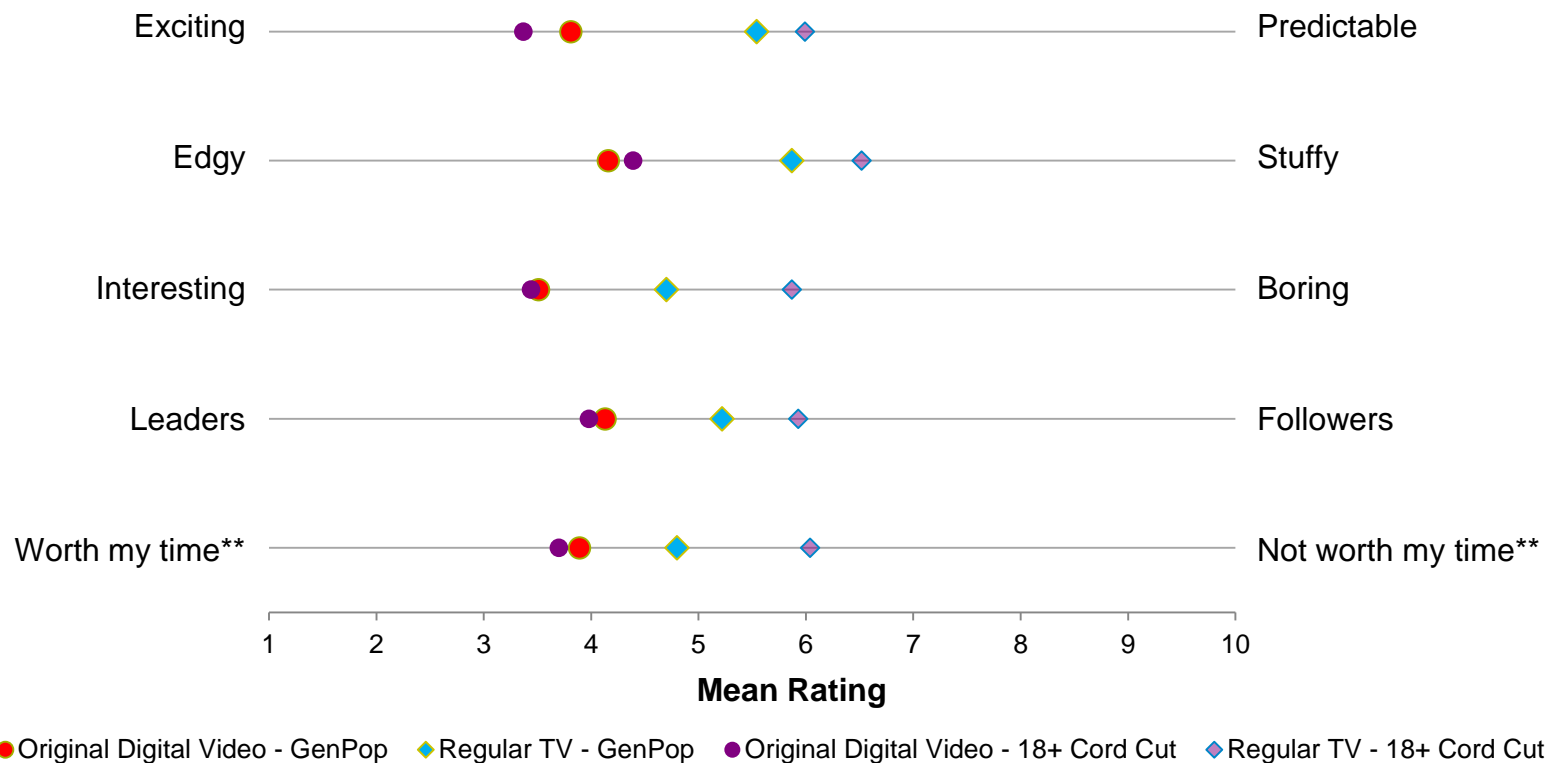
Q40. And, in your opinion, where does your image of each of these fall on the following scale ... closer to the word on the left; closer to the word on the right; or somewhere in-between?
Base: Original Digital Video and Regular TV Viewer (2016: N=88/88) ^{^caution : small base}

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Image Comparison – More Similar

- The image of Original Digital Video is rather similar between Cord Cutters/Nevers and overall ODV viewers; perceptions of regular TV are more negative among Cord Cutters/Nevers

Image of Regular TV vs. Original Digital Video
– Monthly+ Users of TV and Original Digital Video ^



Q40. And, in your opinion, where does your image of each of these fall on the following scale ... closer to the word on the left; closer to the word on the right; or somewhere in-between?
Base: Original Digital Video and Regular TV Viewer (2016: N=88/88) ^caution : small base

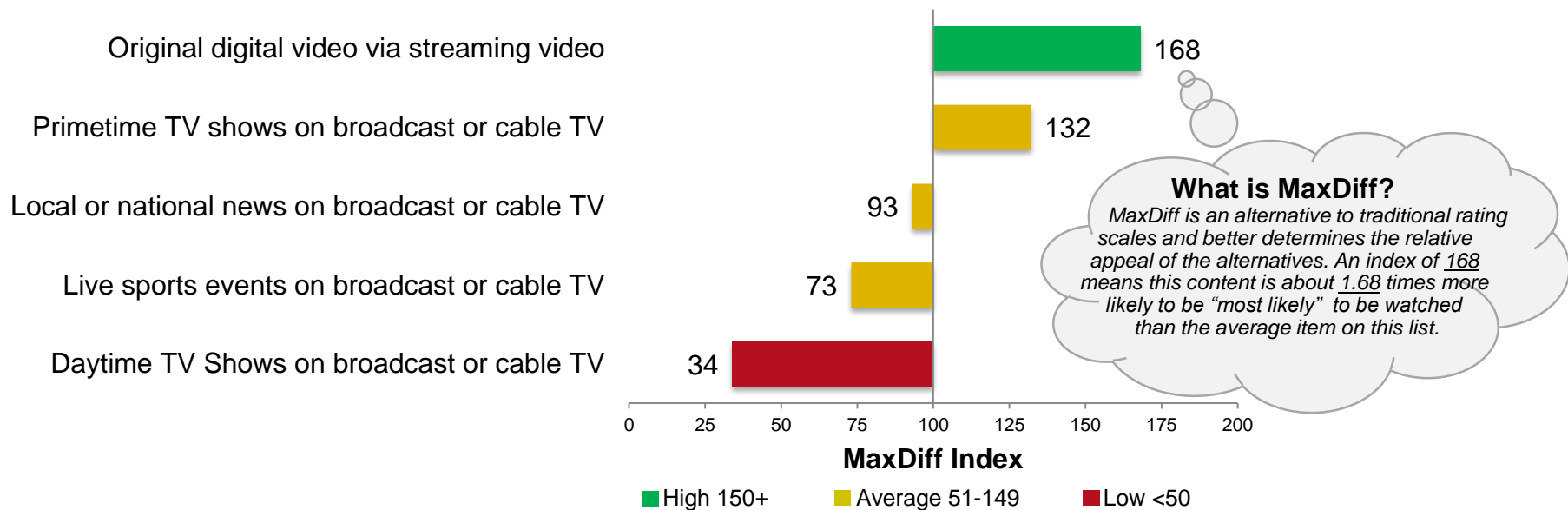
Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Perceptions Among ODV Viewers Who Are Cord Cutters/Nevers

- Among ODV viewers who are Cord Cutters/Nevers, Original Digital Video beats TV as the video content most likely to be watched

Video Most Likely to Watch

– 18+ Cord Cutters/Nevers Monthly+ Users of Original Digital Video –



Q41. Choose the type of video you would be **most likely** to watch, and which one you would be **least likely** to watch...

Base: 18+ Cord Cutters/Nevers and Monthly+ Viewers of Original Digital Video (n=146)

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Influence of Original Digital Video on Cord Cutter/Never Status

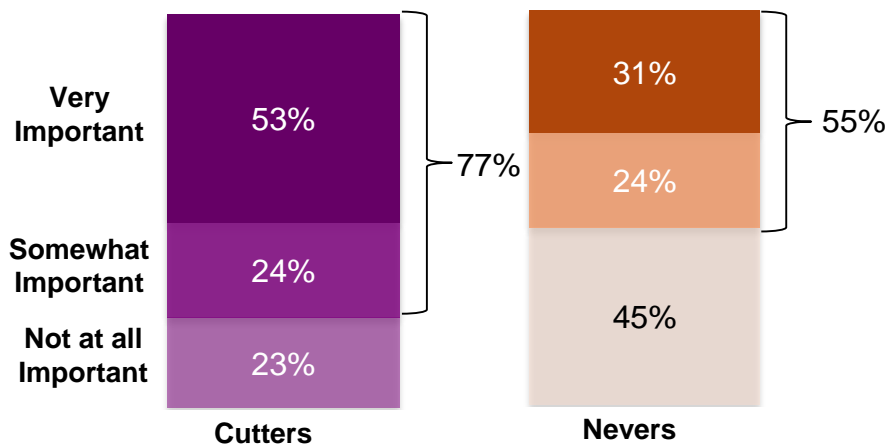
- More than half of ODV viewers who are Cord Cutters/Nevers say Original Digital Video was an important reason for cancelling or not having pay TV
- Three-quarters of Cord Cutters report that streaming video was important in their decision to cancel pay TV (half cited very important)

Degree Streaming Video Affects Lack of Pay TV

– 18+ Cord Cutters/Nevers –

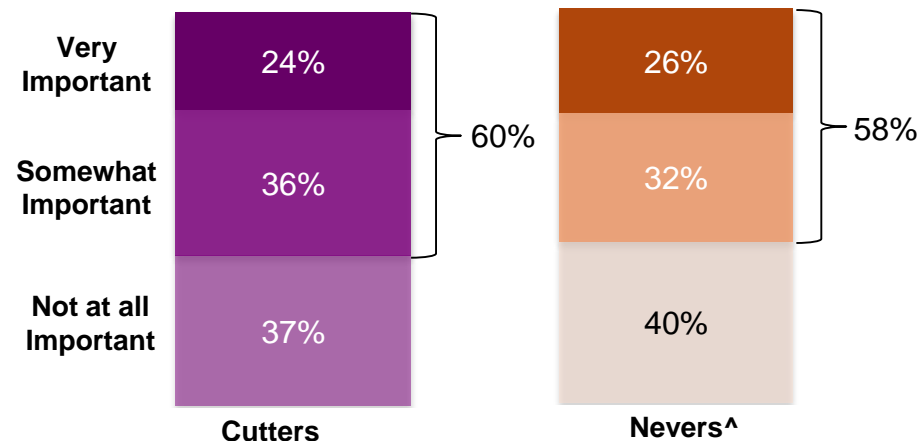
Importance of Streaming Video (any type) in Cancelling/Not Having Pay TV

- Total -



Importance of Original Digital Video in Cancelling/Not Having Pay TV

- Monthly+ Original Digital Video Viewers -



Q50b/Q50c. How important a role did streaming video – of any type – play in your decision to cancel your subscription to cable, satellite, fios, telco or paid TV?? / How important a role did streaming of original digital video play in your decision to cancel your subscription to cable, satellite, fios, telco or paid TV?

Base: Total Qualified and cord-cutter (n=173) / Total qualified and cord cutter and ad-supported ODV viewer (n=100)

Q50d/Q50e. How important a role does streaming video – of any type – play in your decision to not have a subscription to cable, satellite, fios, telco or paid TV? how important a role does streaming of original digital video play in your decision to not have a subscription to cable, satellite, FIOS, telco or paid TV?

Base: Total qualified and cord-never (n=101) / Total qualified and cord cutter and ad-supported ODV viewer (n=50[^])














[^]caution : small base

Original Digital Video (ODV) refers to originally produced online video, defined as professionally produced video only for ad-supported online distribution and viewing.

Monthly+ Viewer Demographics

Demographic/Device Profile of Monthly+ Users

- Original Digital Video viewers have a greater male skew than 2015 and have a significant increase in median household income than a year ago
- Cord Cutters/Nevers skew young, male and lower income

	 TV Online	 Amateur	 Original Digital Video	 18+ Cord Cutter/Nevers ODV
	(N=509) (B)	(N=535) (C)	(N=407) (D)	(N=150) (W)
 Male	48%	51%	57% ^{BC} +7	59%
 Female	52 ^D	49 ^D	43 -7	41
 Mean age	37.3	38.7 ^{BD}	37.4	36.3
 Median HH income (in thousands)	76.9 +6	75.9	76.3 +6	59.6
 Non-Ethnic	62 -5	61	61	62
 College Grad+	38	35 -5	39 ^C	43
 Married	48	49	50	54
 Any kids in HH	40	36	36	35
 Median HH size	3	3	3	3

Demographics

Letter indicates significant difference at 95% confidence level.

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+/- indicates >4 percentage points higher/lower than 2015 (>5 pp for Original Digital Video)

QUESTIONS?

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