Video Content Discovery Study

March 2017

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The IAB (Interactive Advertising Bureau) wanted to better understand the process of discovering video content. More specifically, the IAB wanted to delve into how consumers find out about and determine a platform for viewing TV shows, subscription streaming service original shows, and original digital videos.

The IAB partnered with MARU/Matchbox on this quantitative research. Research was conducted among MARU/Matchbox’s Springboard America online panel (~250,000 US members) using an online survey.

- n=802 representative of US 18+ year-olds
- The survey was fielded 3/14/2017- 3/23/17
Traditional TV Show Viewers are more balanced across ages than viewers of other types of video content

Q7. What type of video content do you watch?
Base: Adults 18+, n=802
IAB Research using MARU/Matchbox’s Springboard America Online Panel
Representative of General US Adult 18+ Online Population, March 2017
TV itself plays the biggest role in Traditional TV Show discovery, subscription services are the second viewing destination

### TV Shows
Among Viewers

<table>
<thead>
<tr>
<th>Top Ways Viewers Hear About Them</th>
<th>Where Viewers Go To Find Them</th>
<th>How Viewers Typically Watch Them</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TV commercial</strong></td>
<td>Live TV guide/on screen menu</td>
<td>Live TV</td>
</tr>
<tr>
<td><img src="image" alt="56%" /></td>
<td><img src="image" alt="32% use this most" /></td>
<td><img src="image" alt="54%" /></td>
</tr>
<tr>
<td><strong>Word of mouth</strong></td>
<td>Subscription streaming service menu</td>
<td><img src="image" alt="31%" /></td>
</tr>
<tr>
<td><img src="image" alt="47%" /></td>
<td><img src="image" alt="33%" /></td>
<td>DVR</td>
</tr>
<tr>
<td></td>
<td></td>
<td><img src="image" alt="38%" /></td>
</tr>
</tbody>
</table>

Q11: How do you typically hear about [INSERT VIDEO_TYPE]?
Q12. Do ads for [INSERT VIDEO_TYPE] influence you to watch? / Q13. Which sounds more like the way you typically watch [INSERT VIDEO_TYPE]?
Q14. Where do you go to find [INSERT VIDEO_TYPE] to watch? / Q15. And of the different ways you use to find a [INSERT VIDEO_TYPE], which do you do most often?
Q16. After you find the [INSERT VIDEO_TYPE] you want, how do you typically watch it? / Q17. On what screen do you typically watch [INSERT EACH VIDEO_TYPE]?

Base: Viewers of each video type [only responses above 30% shown]
IAB Research using MARU/Matchbox’s Springboard America Online Panel
Representative of General US Adult 18+ Online Population, March 2017
Word of mouth is the top source of SSO awareness, but service’s own interfaces and recommendation engines are also very important.

### Subscription Service Original Shows

#### Among Viewers

<table>
<thead>
<tr>
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<th>How Viewers Typically Watch Them</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word of mouth</td>
<td>Subscription streaming service menu</td>
<td>60% use this most 75%</td>
</tr>
<tr>
<td>Recommendation through subscription streaming services</td>
<td>Online search 36%</td>
<td></td>
</tr>
<tr>
<td>TV commercial</td>
<td>YouTube search 30%</td>
<td></td>
</tr>
<tr>
<td>Online browsing</td>
<td>TV network website/app 30%</td>
<td></td>
</tr>
<tr>
<td>Subscription streaming service menu or browsing</td>
<td>Subscription streaming service 95%</td>
<td></td>
</tr>
</tbody>
</table>

Q11: How do you typically hear about [INSERT VIDEO_TYPE]?
Q12: Do ads for [INSERT VIDEO_TYPE] influence you to watch / Q13. Which sounds more like the way you typically watch [INSERT VIDEO_TYPE]?
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Q16. After you find the [INSERT VIDEO_TYPE] you want, how do you typically watch it? / Q17. On what screen do you typically watch [INSERT EACH VIDEO_TYPE]?

Base: Viewers of each video type [only responses above 30% shown]
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The path of discovery for original digital videos is more varied – social media and YouTube contribute.

### Original Digital Videos Among Viewers

#### Top Ways Viewers Hear About Them

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online browsing</td>
<td>51%</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>43%</td>
</tr>
<tr>
<td>TV commercial</td>
<td>42%</td>
</tr>
<tr>
<td>Social media posts or comments</td>
<td>40%</td>
</tr>
<tr>
<td>Social media ad</td>
<td>39%</td>
</tr>
<tr>
<td>Recommendation on YouTube</td>
<td>38%</td>
</tr>
<tr>
<td>Online ad</td>
<td>31%</td>
</tr>
</tbody>
</table>

#### Where Viewers Go To Find Them

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube search</td>
<td>66%</td>
</tr>
<tr>
<td>Online search</td>
<td>48%</td>
</tr>
<tr>
<td>Streaming service menu or browsing</td>
<td>35%</td>
</tr>
<tr>
<td>Video app menu on a connected TV/streaming video device</td>
<td>30%</td>
</tr>
</tbody>
</table>

#### How Viewers Typically Watch Them

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free streaming app</td>
<td>68%</td>
</tr>
<tr>
<td>Websites</td>
<td>65%</td>
</tr>
</tbody>
</table>

Q11: How do you typically hear about [INSERT VIDEO_TYPE]?
Q12: Do ads for [INSERT VIDEO_TYPE] influence you to watch?
Q13: Which sounds more like the way you typically watch [INSERT VIDEO_TYPE]?
Q14: Where do you go to find [INSERT VIDEO_TYPE] to watch?
Q15: And of the different ways you use to find a [INSERT VIDEO_TYPE], which do you do most often?
Q16: After you find the [INSERT VIDEO_TYPE] you want, how do you typically watch it?
Q17: On what screen do you typically watch [INSERT EACH VIDEO_TYPE]?

Base: Viewers of each video type [only responses above 30% shown]

IAB Research using MARU/Matchbox’s Springboard America Online Panel
Representative of General US Adult 18+ Online Population, March 2017
Among Original Digital Video viewers...

83% Say that when watching original digital video, they usually end up watching more than one video at one sitting.

74% Say that they watch original digital video to take a break.

73% Say that original digital video content has gotten better since a year ago.

62% Say that it's easier to find original digital video content to watch than it is to find a TV show or subscription original digital video.

61% Follow specific YouTube stars
Nearly half of streaming service viewers use TV’s on-screen menu to find videos to watch

**Preferred Way to Interact with a Streaming Service**

Among those who watch video streaming services

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-screen TV menu using my remote</td>
<td>49%</td>
</tr>
<tr>
<td>Website using my phone, tablet or computer</td>
<td>29%</td>
</tr>
<tr>
<td>Mobile app using my phone or tablet</td>
<td>15%</td>
</tr>
<tr>
<td>Using voice activation on my smart remote, smartphone (e.g. Siri) or device (e.g. Echo, Alexa)</td>
<td>7%</td>
</tr>
</tbody>
</table>

Q6a. Think about when you’re looking for something to watch. Of all the ways to find video to watch, how do you prefer to interact with a video service?
Base: Those who watch video streaming services
IAB Research using MARU/Matchbox’s Springboard America Online Panel
Representative of General US Adult 18+ Online Population, March 2017
How viewers hear about each video content type

Ways Viewers Hear About Each Type of Video
Among Viewers of Each

TV Shows
(Top Ways Viewers Hear About Them)

- TV commercial: 56%
- Word of mouth: 47%
- Live TV guide/on screen menu: 29%
- Online browsing: 28%
- Social media posts or comments: 24%
- Social media ad: 23%
- Recommendation through subscription service menu: 20%
- Subscription streaming service menu: 18%
- Online articles/reviews: 17%
- TV network’s website/app: 17%
- Video ad online: 15%
- Newspaper/Magazine articles/reviews: 15%
- Online ad: 15%
- Recommendation on YouTube: 14%
- Newspaper/Magazine ads: 12%
- Recommendation through on-screen ad: 10%
- Websites that sell/rent video content: 9%
- Radio ads: 9%
- Ad on billboard: 8%
- Recommendation on specialized website: 5%
- Other: 2%

Subscription Service Original Show
(Top Ways Viewers Hear About Them)

- Word of mouth: 48%
- Recommendation through subscription service menu: 40%
- TV commercial: 39%
- Online browsing: 36%
- Subscription streaming service menu: 34%
- Social media posts or comments: 30%
- Social media ad: 29%
- Online ad: 26%
- Online articles/reviews: 23%
- Recommendation on YouTube: 18%
- Websites that sell/rent video content: 18%
- Video ad online: 18%
- Newspaper/Magazine articles/reviews: 11%
- Radio ads: 10%
- Recommendation on specialized website: 10%
- Newspaper/Magazine ads: 10%
- Ad on billboard: 9%
- Other: 1%

Original Digital Video
(Top Ways Viewers Hear About Them)

- Online browsing: 51%
- Word of mouth: 43%
- TV commercial: 42%
- Social media posts or comments: 40%
- Social media ad: 39%
- Recommendation on YouTube: 38%
- Online ad: 31%
- Streaming service menu or browsing: 28%
- Online articles/reviews: 27%
- Video ad online: 24%
- Newspaper/Magazine articles/reviews: 22%
- Ad on billboard: 19%
- Newspaper/Magazine ads: 17%
- Recommendation on specialized website: 16%
- Radio ads: 15%
- Other: 3%

Q11: How do you typically hear about [INSERT VIDEO_TYPE]?
Base: Viewers of each video type
IAB Research using MARU/Matchbox’s Springboard America Online Panel
Representative of General US Adult 18+ Online Population, March 2017
### Where Viewers Go To Find Each Type of Video

#### Among Viewers of Each

<table>
<thead>
<tr>
<th>TV Shows</th>
<th>Subscription Service Original Show</th>
<th>Original Digital Video</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Where Viewers Go To Find Them)</td>
<td>(Where Viewers Go To Find Them)</td>
<td>(Where Viewers Go To Find Them)</td>
</tr>
<tr>
<td>Live TV guide/on screen menu</td>
<td>Subscription streaming service menu</td>
<td>YouTube search</td>
</tr>
<tr>
<td>Subscription streaming service...</td>
<td>47%</td>
<td>66%</td>
</tr>
<tr>
<td>Online search</td>
<td>Online search</td>
<td>Online search</td>
</tr>
<tr>
<td>DVR</td>
<td>33%</td>
<td>48%</td>
</tr>
<tr>
<td>YouTube search</td>
<td>YouTube search</td>
<td>Streaming service menu or browsing</td>
</tr>
<tr>
<td>TV network website/app</td>
<td>TV network website/app</td>
<td>Video app menu on a connected TV/streaming video device</td>
</tr>
<tr>
<td>Internet-based live TV service</td>
<td>Connected TV/streaming video device universal search</td>
<td>Video app menu on a smartphone or tablet (free, no subscription)</td>
</tr>
<tr>
<td>My pay TV provider's website or...</td>
<td>Website/App that sells/rents video content</td>
<td>Connected TV/streaming video device universal search</td>
</tr>
<tr>
<td>Connected TV/streaming video...</td>
<td>Website/App that sells/rents video content (e.g., iTunes)</td>
<td>Website/App that sells/rents video content (e.g., iTunes)</td>
</tr>
<tr>
<td>VOD (Video On Demand)...</td>
<td>Other</td>
<td>Other</td>
</tr>
<tr>
<td>Website/App that streams free...</td>
<td>12%</td>
<td>22%</td>
</tr>
<tr>
<td>Website/App that sells/rents...</td>
<td>8%</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q14: Where do you go to find [INSERT VIDEO_TYPE] to watch?
Base: Viewers of each video type
IAB Research using MARU/Matchbox’s Springboard America Online Panel
Representative of General US Adult 18+ Online Population, March 201
Most know what they want to watch from the start but some don’t know what they want until they start looking

Which sounds more like the way you typically watch [VIDEO TYPE]?
Among Viewers of Each

- I usually don’t know what I want to watch until I start looking
- I know what I want to watch and look for it specifically

<table>
<thead>
<tr>
<th>VIDEO TYPE</th>
<th>Most</th>
<th>Least</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV Shows</td>
<td>25%</td>
<td>75%</td>
</tr>
<tr>
<td>Subscription Service</td>
<td>32%</td>
<td>68%</td>
</tr>
<tr>
<td>Original Digital Videos</td>
<td>36%</td>
<td>64%</td>
</tr>
</tbody>
</table>

Q. Which sounds more like the way you typically watch [VIDEO TYPE]?
Base: Viewers of each video type
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Ads influence what most viewers watch

% Who say ads have influence on what they watch
Among Viewers of Each

- TV Shows
  - A lot: 22%
  - A little: 58%
  - Total: 81%

- Subscription Service Original Shows
  - A lot: 30%
  - A little: 53%
  - Total: 82%

- Original Digital Videos
  - A lot: 39%
  - A little: 40%
  - Total: 79%

Q12. Do ads for [INSERT VIDEO_TYPE] influence you to watch
Base: Viewers of each video type
IAB Research using MARU/Matchbox's Springboard America Online Panel
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Over half of Original Digital Video Viewers say social media has a strong influence on what they watch

% Who say social media has a strong influence on what they watch
Among Viewers of Each

- TV Shows
  - A lot: 32%
  - A little: 13%
  - 19%

- Subscription Service Original Shows
  - A lot: 20%
  - A little: 25%
  - 27%

- Original Digital Videos
  - A lot: 57%
  - A little: 30%

Q19. How much do you agree or disagree with the following statements about finding videos to watch? (Agree/Strongly Agree)
Social media has a strong influence on what videos I watch
Base: Viewers of each video type
IAB Research using MARU/Matchbox’s Springboard America Online Panel
Representative of General US Adult 18+ Online Population, March 2017