



## Mobile Video 2015: A global perspective

# Top Take Homes

- **Mobile video is not only a short-form phenomenon** – 36% of smartphone video viewers surveyed say they watch long-form videos (5 minutes or longer) daily or more frequently, as compared to 58% of respondents who say they watch short videos (under 5 minutes) at that level of frequency.
- **Mobile video consumption is on the rise** – 35% of respondents report watching more video on their smartphone versus last year. Even more so in U.S. (50%), Canada (42%), New Zealand (42%), South Africa (42%), and the U.K. (40%)
- **Dual-screen video viewing is a thing** – 53% of smartphone video viewers across the 24 markets say they often or sometimes watch mobile video while watching TV. Only in Japan is this trend noticeably less prevalent.
- **Apps are beating browsers as the access point to mobile video** - 48% only/mostly use mobile apps to watch video on their smartphone. By contrast only 18% say they only or mostly use mobile websites.
- **Advertising is seen** and video viewers in surveyed markets are overwhelmingly open to **tailored advertising** when watching mobile video.
- **Viral video** – 68% share the videos they watch on their smartphones, and 42% say social media is a way they often find smartphone video they watch.

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## **Methodology and Sample**



# Objectives and Methodology.

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## Objectives

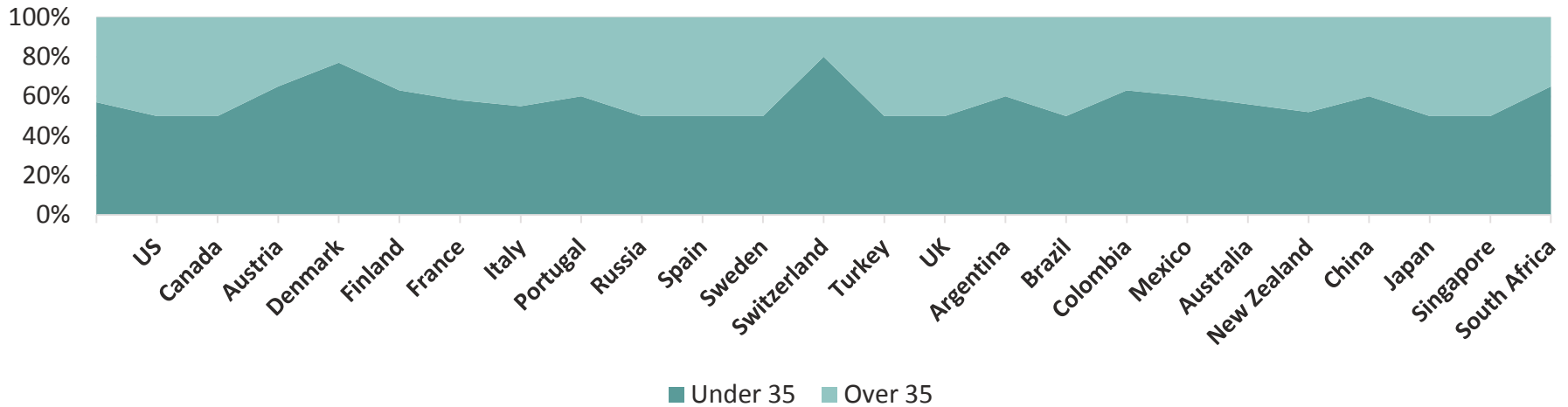
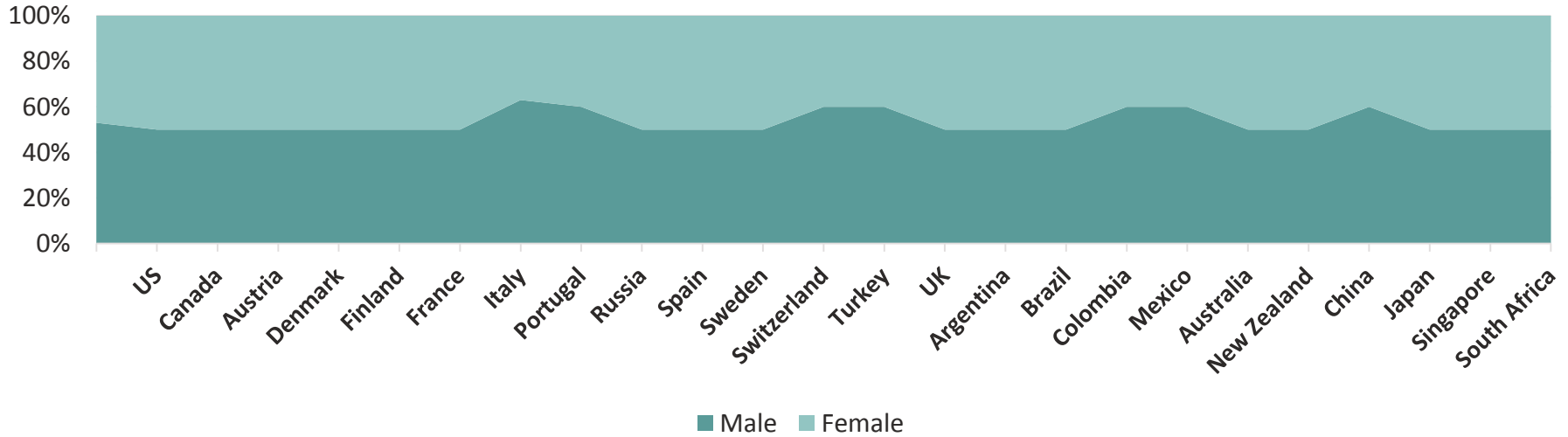
The IAB Mobile Marketing Center of Excellence, in conjunction with 23 other IABs and other partners around the world, seek primary research that will compare and contrast the role of mobile in the lives of consumers around to world for mobile video usage.

## Methodology

- A 20 question survey was designed and fielded in 24 markets (please see next slide for map)
- In each market 200 consumers who were 16 plus, owned a smartphone and watched either short or long mobile videos.
- All respondents were asked the same questions – frequency of watching, genres of mobile video watched, where they watch mobile videos, when they watch them, how they watch mobile video, do they share mobile video and whether they see any ads while watching mobile video.
- Fieldwork took place from the: 14<sup>th</sup> April to 11<sup>th</sup> May 2015.
- Throughout the deck, slides have been created by looking at 1) Total global scores (all markets combined) 2) Regional scores, 3) Market level scores.



# A balanced sample in all markets was achieved with near equal splits in terms of gender and age.



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200



↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

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**Mobile Video– Frequency,  
attitudes and method of  
access.**



# 58% watch short videos daily or more frequently on their smartphone. 36% watch long videos.

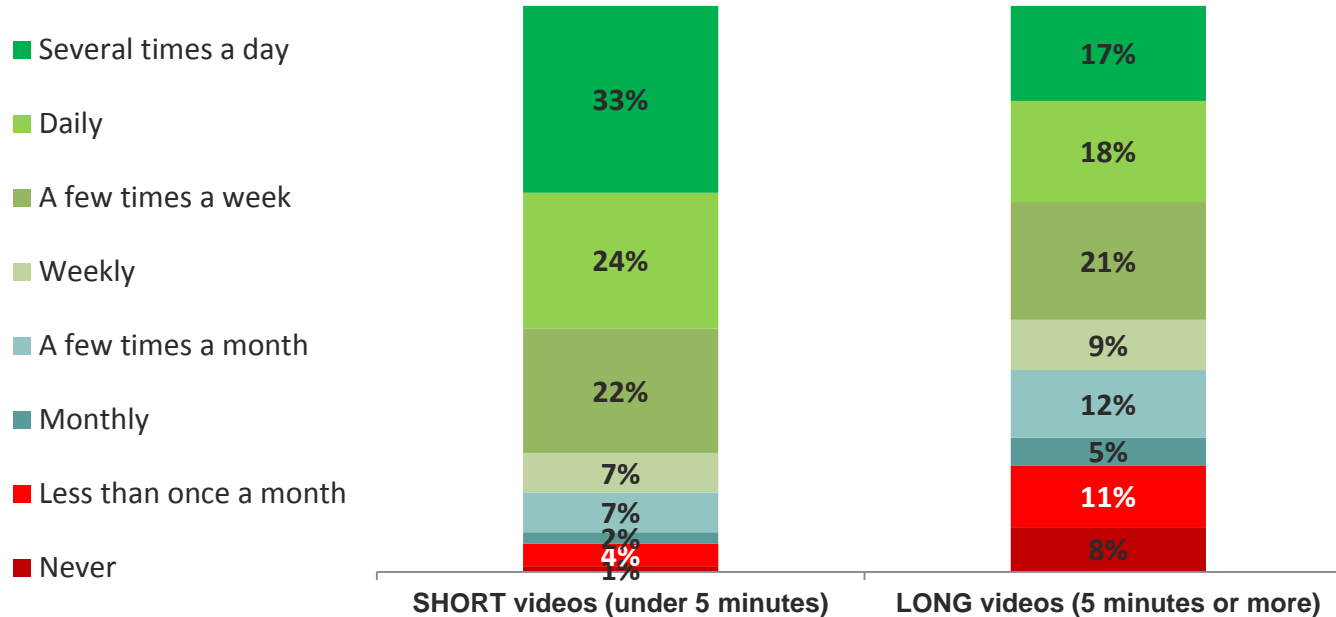
- Daily consumption of short videos is significantly higher than consumption of long videos
- However, long-form viewing is more common than expected
- Data package appears key to 'frequent' video usage. Those with an unlimited data package are significantly more likely to be 'frequent' consumers of mobile video.

## How often do you watch (VIDEO TYPE) on your smartphone

**Heavy Users (Several times a day/Daily):**

**58% ↑**

**36%**



Heavy Users of both video types (short & long) are significantly more likely to be:

Male  
Under 35  
Using an unlimited data package

Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

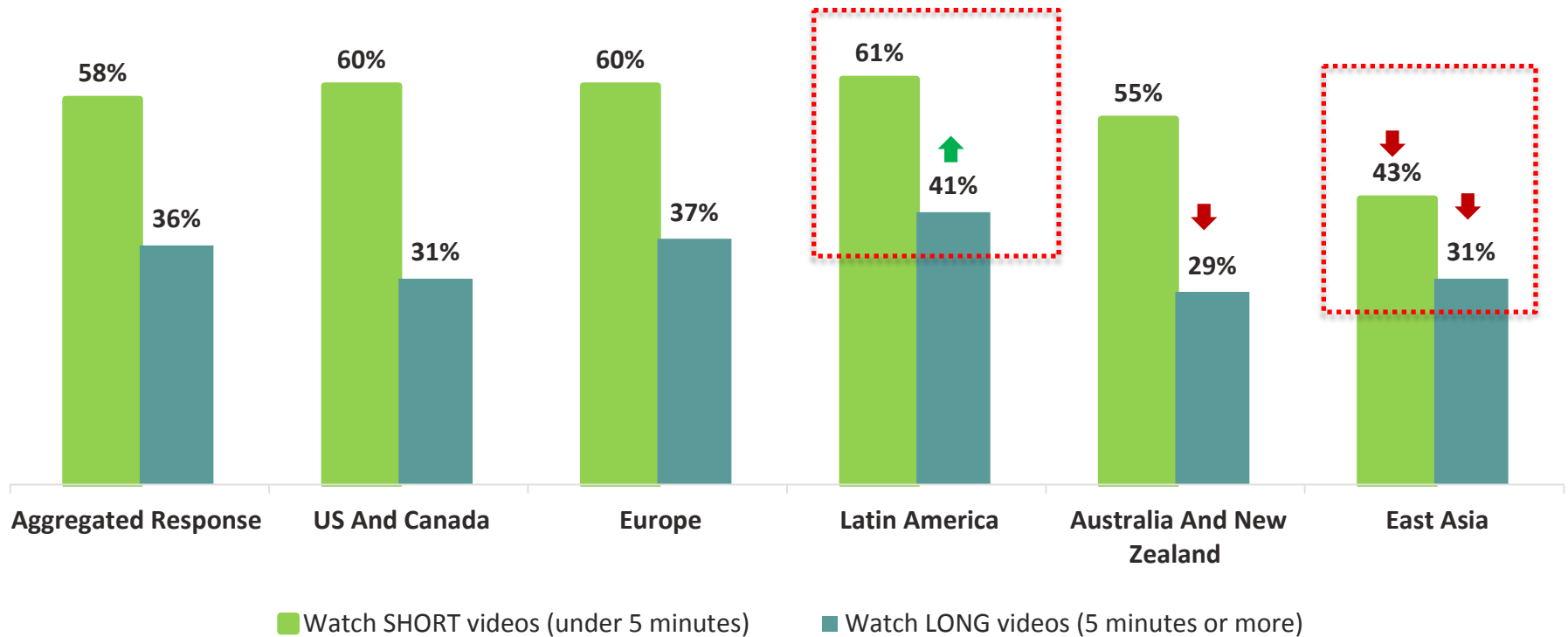
Date: May 2015

Base: Total respondents 4800, Per market: 200

# At 61%, Latin America has the highest levels of frequent mobile video users for both video formats.

- In East Asia, frequent viewing of both video formats is significantly lower than the aggregated average.

How often do you watch (VIDEO TYPE) on your smartphone – Daily or more frequent viewers by region

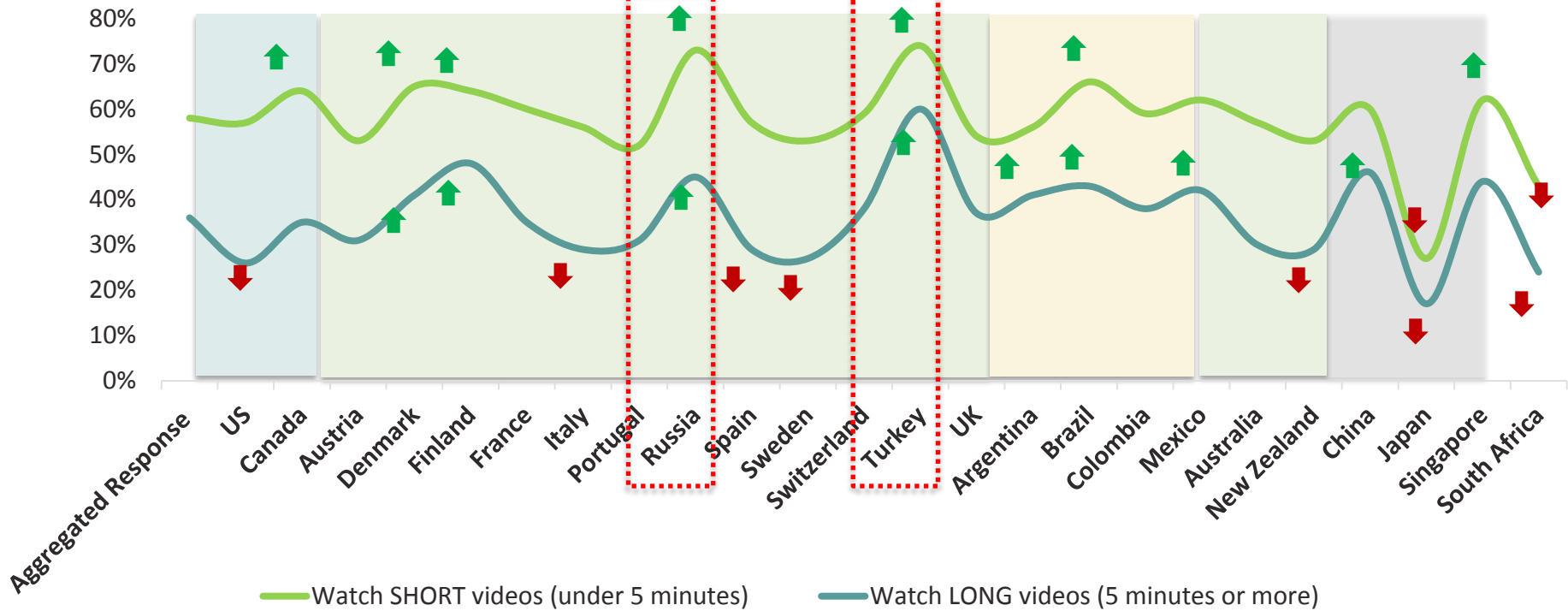


Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa Spain Sweden Switzerland Turkey UK US  
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Base: Total respondents 4800, Per market: 200

# Russia and Turkey are the star markets in Europe terms of frequent mobile video viewing.

- Frequent consumption levels of both short and long mobile video in these two markets is significantly higher than the aggregated average, as well as being above and beyond other markets measured.

How often do you watch (VIDEO TYPE) on your smartphone - Daily or more frequent viewers by market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

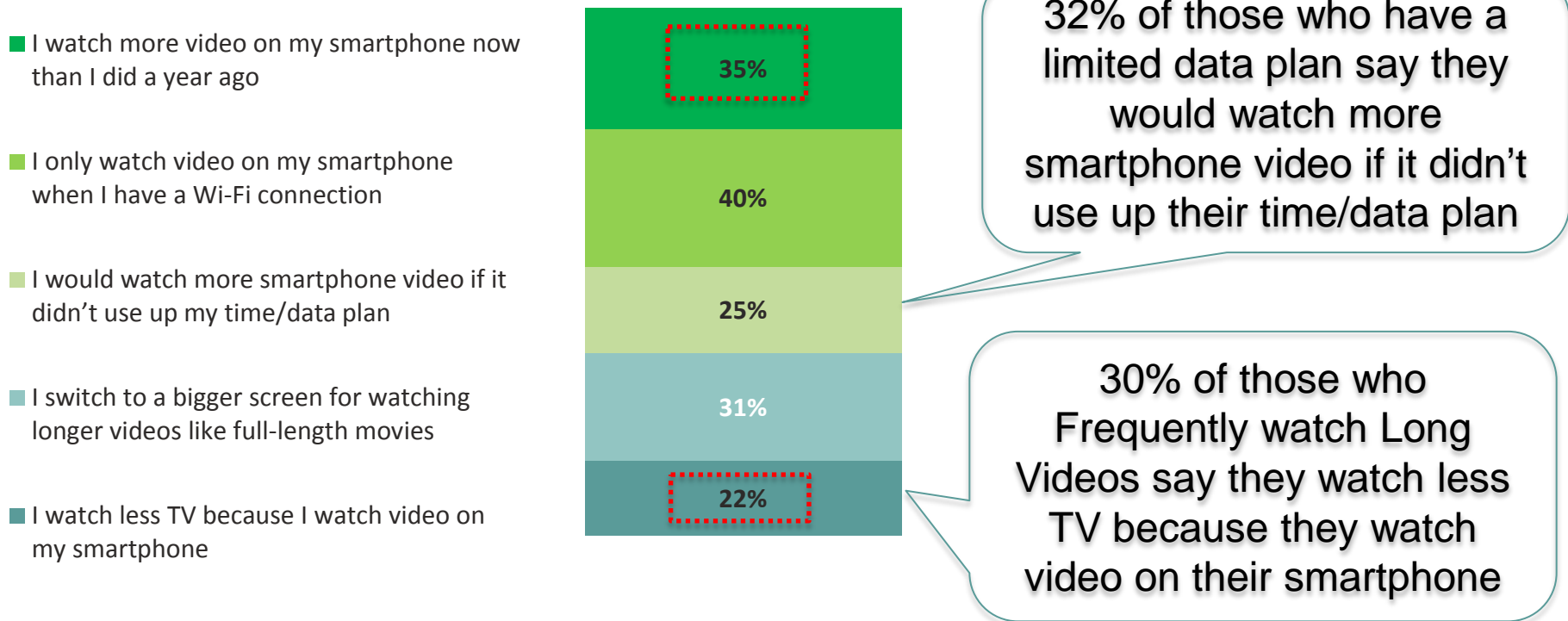
Date: May 2015

Base: Total respondents 4800, Per market: 200

# 35% are now watching more video on their smartphone versus last year.

- 22% claim they watch less TV because they watch video on their smartphone
- Connection and screen size are still key considerations.

## Which of the following do you agree with regarding mobile video? Please check all that apply.



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200



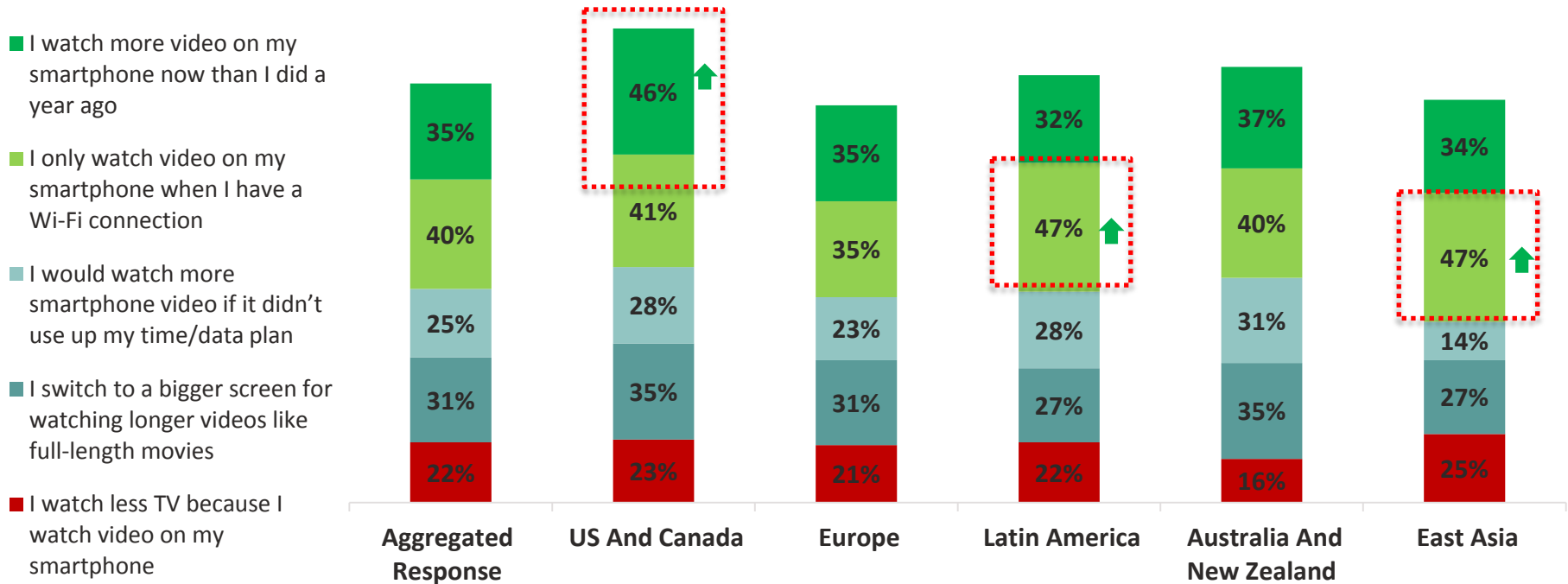
↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.



# Video consumption via smartphone has increased significantly in the US & Canada.

- Wi-Fi is a key factor in Latin America and East Asia.
- In East Asia 25% say they are now watching less TV because they watch video on their smartphone.

Which of the following do you agree with regarding mobile video? Please check all that apply. – By Region



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

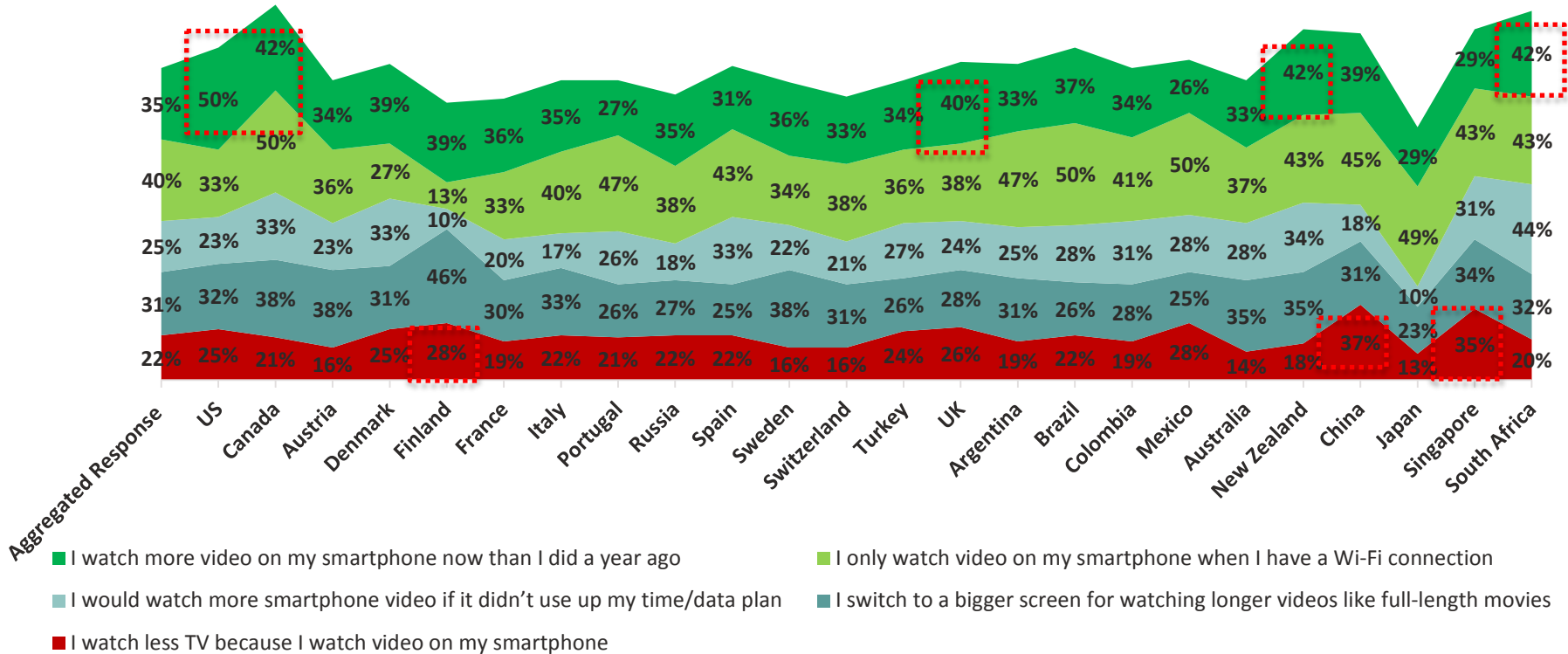
Date: May 2015

Base: Total respondents 4800, Per market: 200

# Video consumption via smartphones has increased most notably in the US, Canada, UK, New Zealand and South Africa.

- 37% in China say they are watching less TV because they watch video on their smartphone, 35% say the same in Singapore.

Which of the following do you agree with regarding mobile video? Please check all that apply. – By Market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200

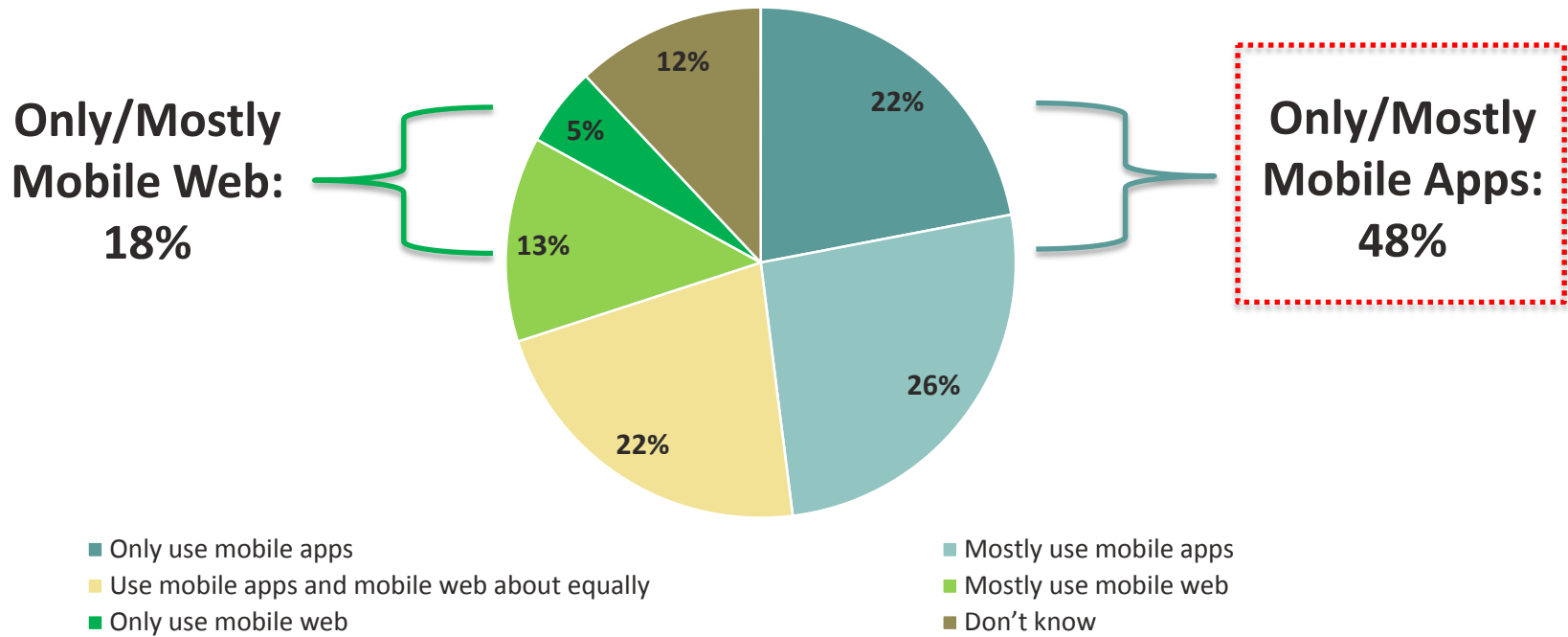


↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

# Apps are the most popular method of accessing mobile video – 48% only/mostly use mobile apps when watching.

- 22% only use mobile apps to watch video on their smartphone.
- This is no doubt related to 3 factors: 1) Source of videos, with providers such as YouTube, Netflix etc. providing stable app atmosphere in which to view, 2) The vast number of pre-load applications that enable mobile video which are present on devices, 3) The on-the-go/catch-up offerings from many TV broadcasters around the world.

When you watch videos on your smartphone, do you do so using mobile websites (in a browser) or using mobile apps?



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

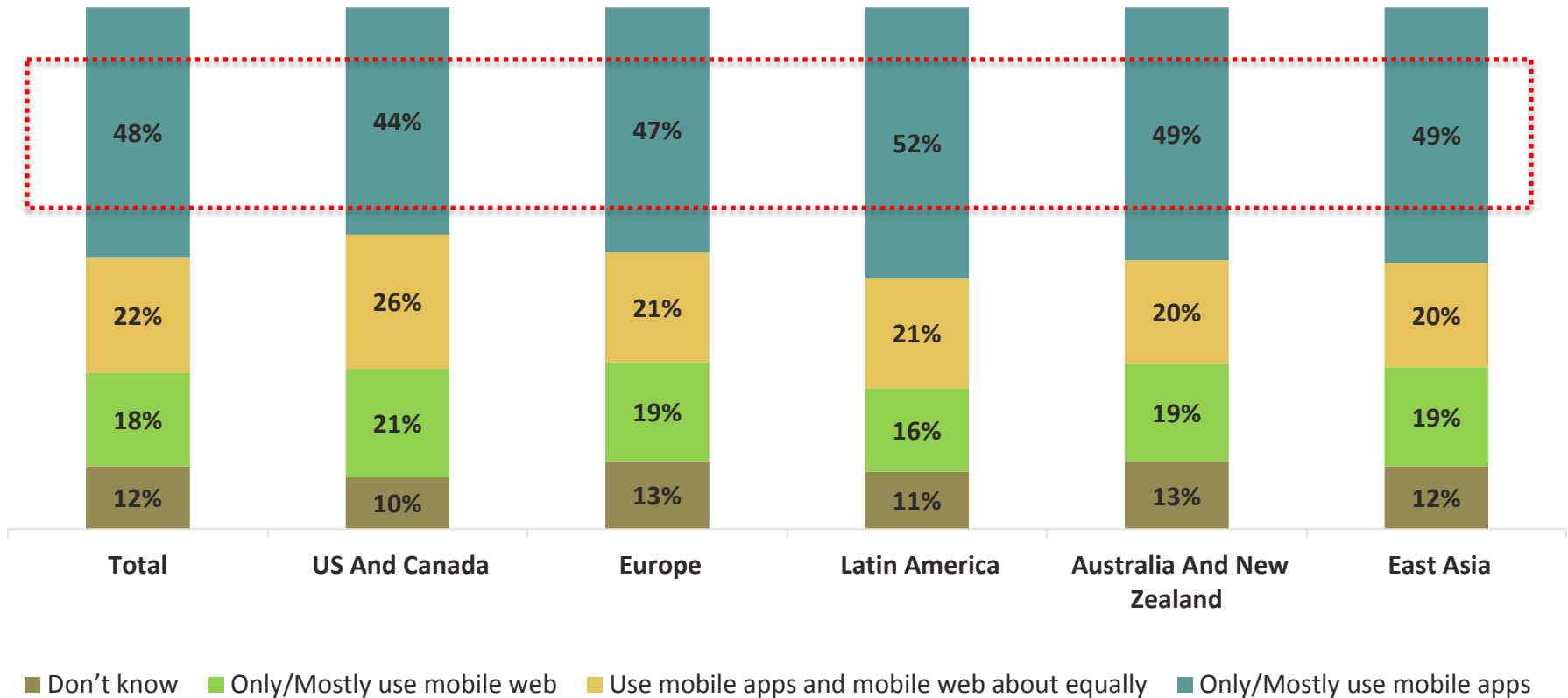
Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200

# This preference towards mobile apps for watching video is evident in all regions.

When you watch videos on your smartphone, do you do so using mobile websites (in a browser) or using mobile apps? – by Region



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa Spain Sweden Switzerland Turkey UK US  
 Date: May 2015  
 Base: Total respondents 4800, Per market: 200



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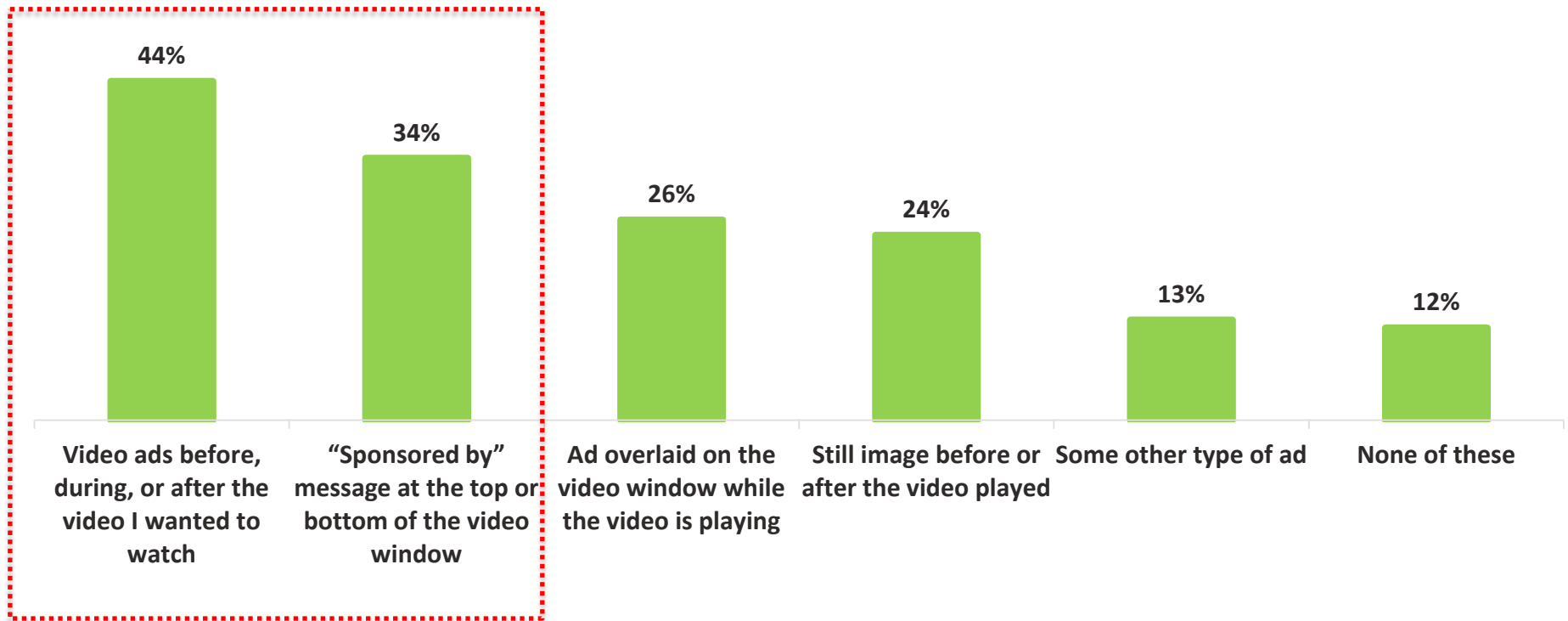
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**Mobile Video– Is advertising  
seen? Feelings about ad  
tailoring/relevancy**

# 44% have seen ads that are before/during or after the video they have watched.

- Pre-roll, midroll, or post-roll are natural and very common as ad types
- 34% have seen a sponsored message.
- About one in ten video viewers claim to have never seen any advertising around video they watch.

## Which of the following types of ads have you seen while watching mobile video?



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

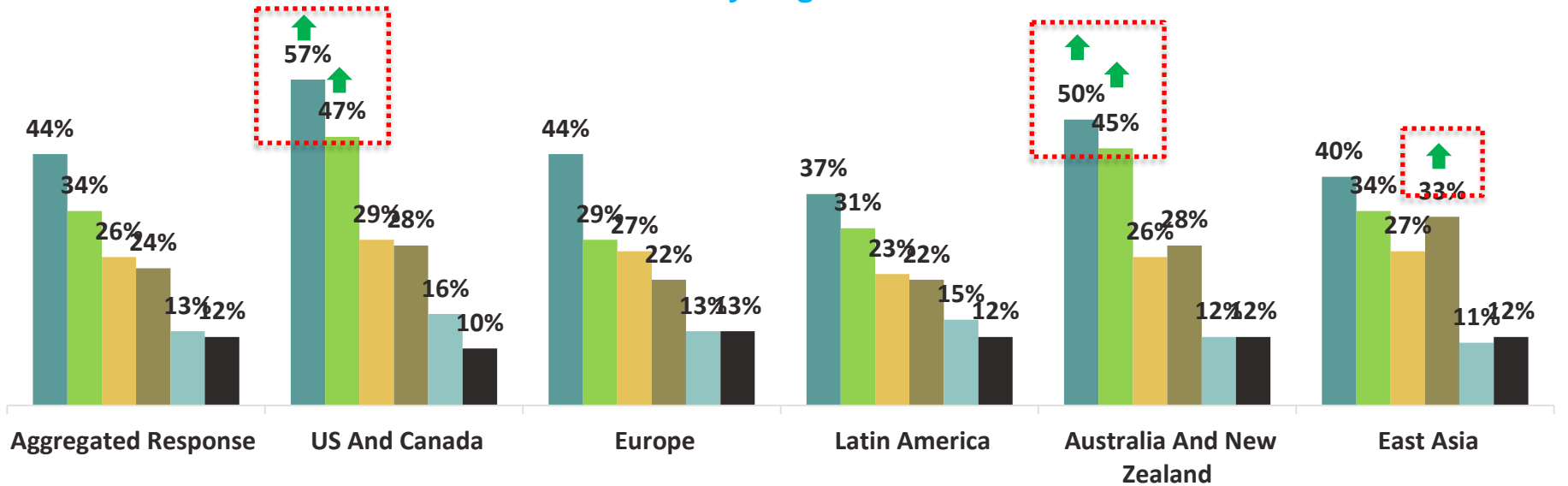
Date: May 2015

Base: Total respondents 4800, Per market: 200

# While video ad formats dominate across regions, ‘sponsored’ ads are more visible in some.

- In the US & Canada and Australia & New Zealand significantly more have seen sponsored-by messages.
- 33% in East Asia have seen still images before or after video has played - significantly more than any other region.

## Which of the following types of ads have you seen while watching mobile video? – By Region



- Video ads before, during, or after the video I wanted to watch
- “Sponsored by” message at the top or bottom of the video window
- Ad overlaid on the video window while the video is playing
- Still image before or after the video played
- Some other type of ad
- None of these

Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200

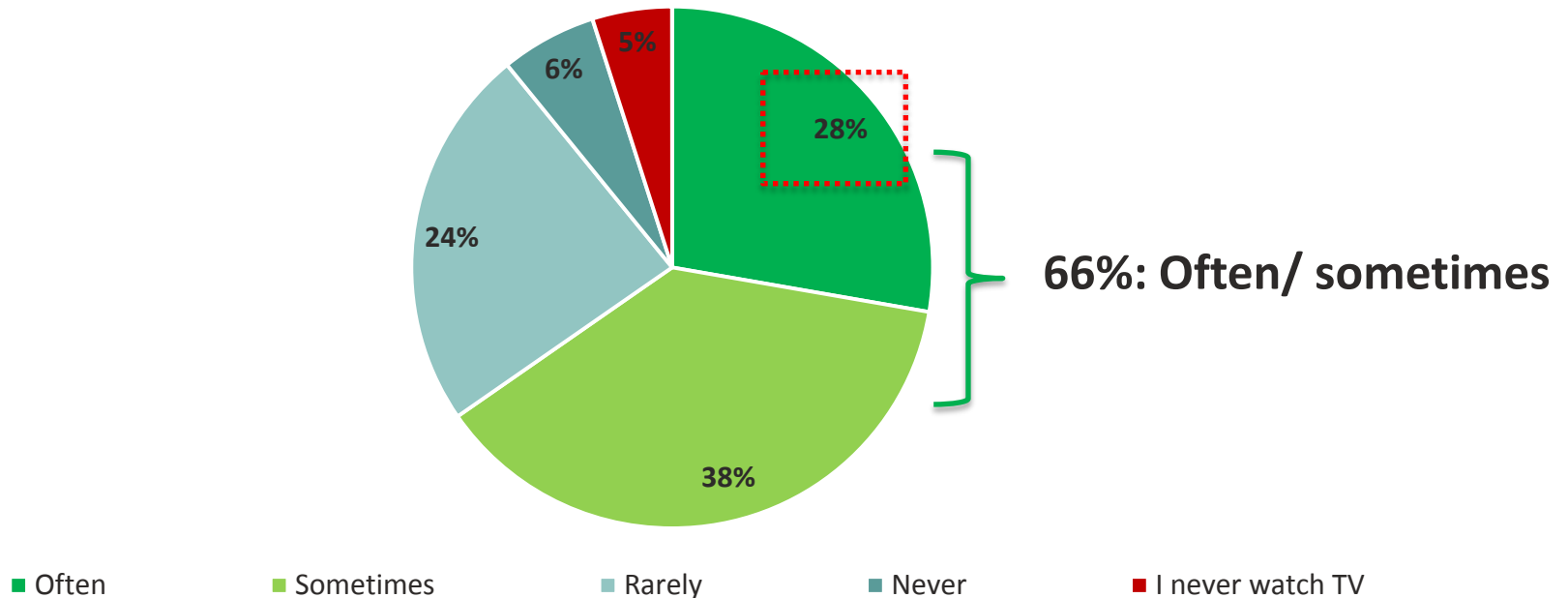


↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

# 28% often see ads while watching mobile video which they have also seen on TV.

- Frequent video users are significantly more likely to have encountered this.
- 33% of frequent short video format users claim to have seen an ad on their mobile while watching video that they have also seen on TV.
- Similarly, 38% of frequent long video format users claim the same.

**While watching mobile video, how often do you see ads that you've also seen on TV?**

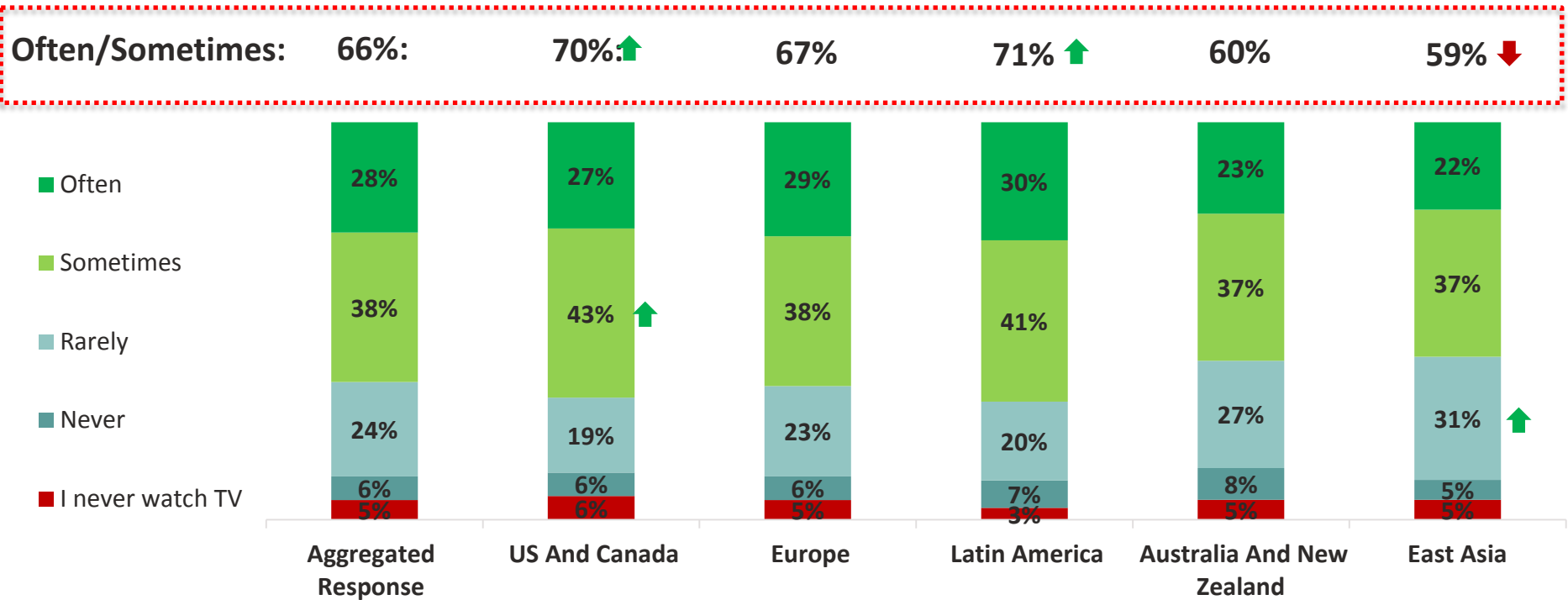




# This trend is evident across all regions, reflecting the increased usage and spend in mobile as an advertising channel.

- In US & Canada and Latin America, 70% state that they often/sometime see TV spots during mobile video viewing.
- 31% in East Asia say they rarely encounter this, does this indicate an opportunity for greater advertising synchronisation across channels/devices?

## While watching mobile video, how often do you see ads that you've also seen on TV?) – By Region



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200



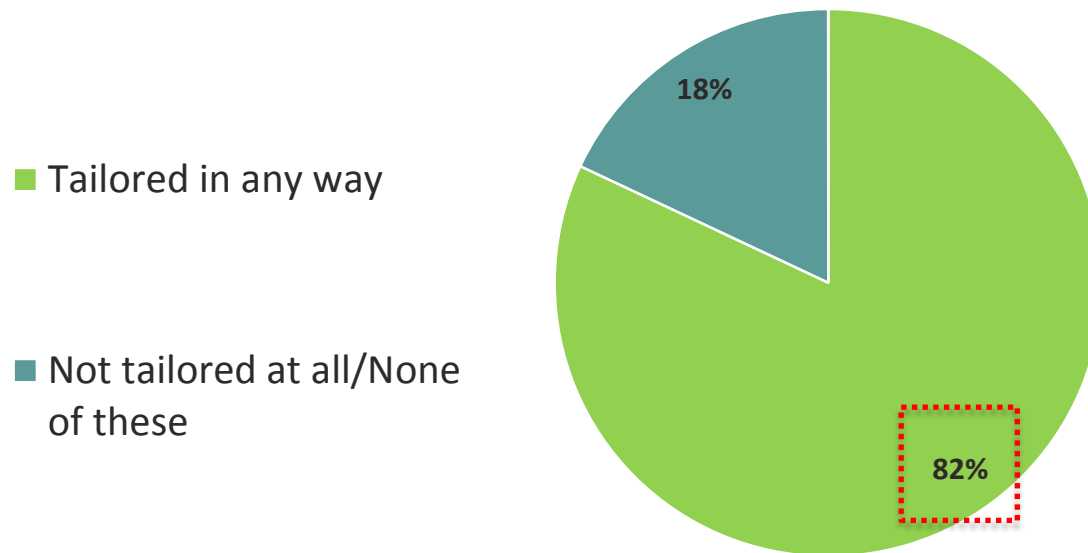
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# Relevance is key in order for mobile video advertising to engage consumers.

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- 82% state that ads that appear in mobile videos should be tailored so they are of interest.
- This clearly indicates to brands and advertisers alike that being relevant—to context and/or to consumers and their habits/behaviour, is vital to drive engagement.

**How should the ads that appear in mobile videos be tailored so they are of interest to you? Should they be:**



■ Tailored in any way

■ Not tailored at all/None of these

Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

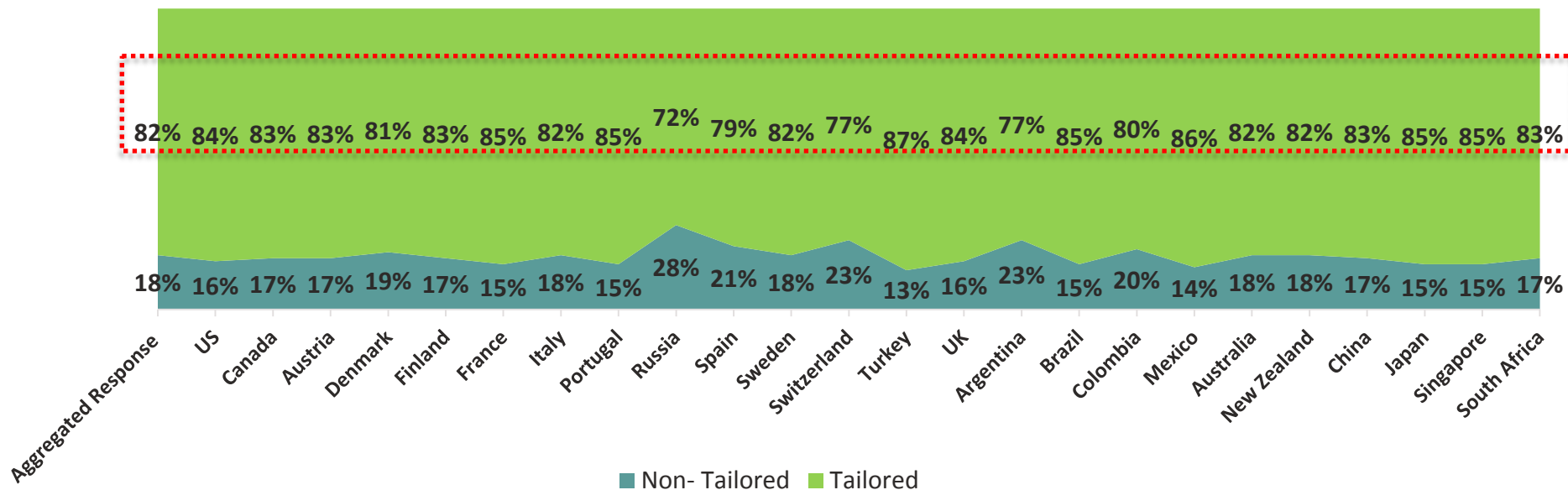
Date: May 2015

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# This desire for tailored advertising is evident in each market measured.

- This desire from consumers is reflective of the change in consumer – brand relationship (monologue to dialogue) that has been bought about via the changing media landscape and the proliferation and expansion of digital.

## How should the ads that appear in mobile videos be tailored so they are of interest to you? Should they be:. – By Market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

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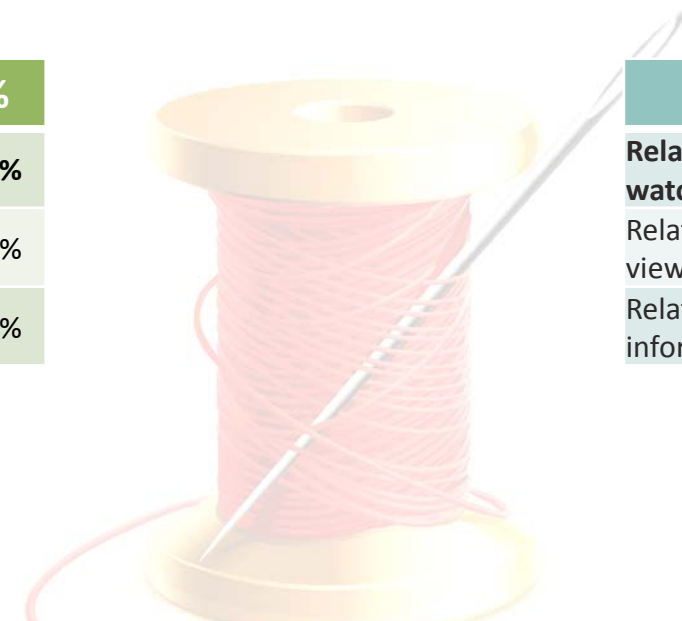
# How should ads be tailored? –ads that are related to the video being watched are a must.

- Video viewing history, context, and location were also cited
- In Europe and East Asia, we see the door open for favourite brands to engage.

US & Canada	%
<b>Related to the video being watched</b>	<b>34%</b>
Related to your recent video viewing history	28%
Related to your location (city or neighbourhood)	24%

Latin America	%
<b>Related to the video being watched</b>	<b>27%</b>
Related to your recent video viewing history	21%
Related to demographic information	18%

Europe	%
<b>Related to the video being watched</b>	<b>25%</b>
Related to your recent video viewing history	18%
Related to your favourite brands	17%



Australia & New Zealand	%
<b>Related to the video being watched</b>	<b>35%</b>
Related to sites you've visited online	21%
Related to your recent video viewing history	20%

East Asia	%
<b>Related to the video being watched</b>	<b>28%</b>
Related to your favourite brands	24%
Related to your daily routine	22%

Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

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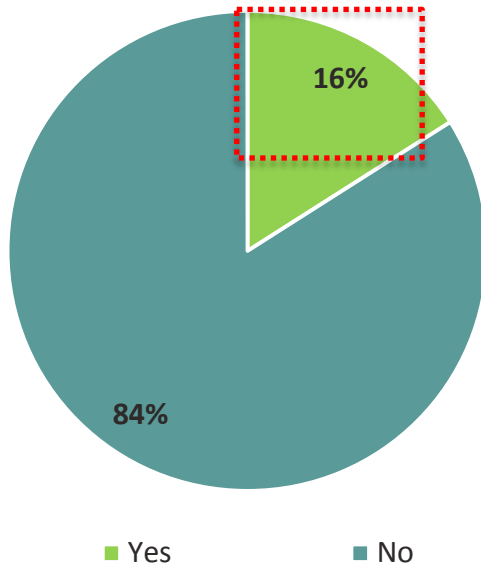
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## **Mobile Video– Attitudes towards paid-for content**

# 16% have paid for a video that they have watched on their smartphone.

- Frequent viewers of long-form video are significantly more likely to have paid for video content.

**Have you ever paid for videos that you have watched on your smartphone? (this could either be paying for mobile video specifically or paying for video that you can watch on any screen, including smartphone)**



Paying for Video by Demographic	
Male	19%
Female	13%

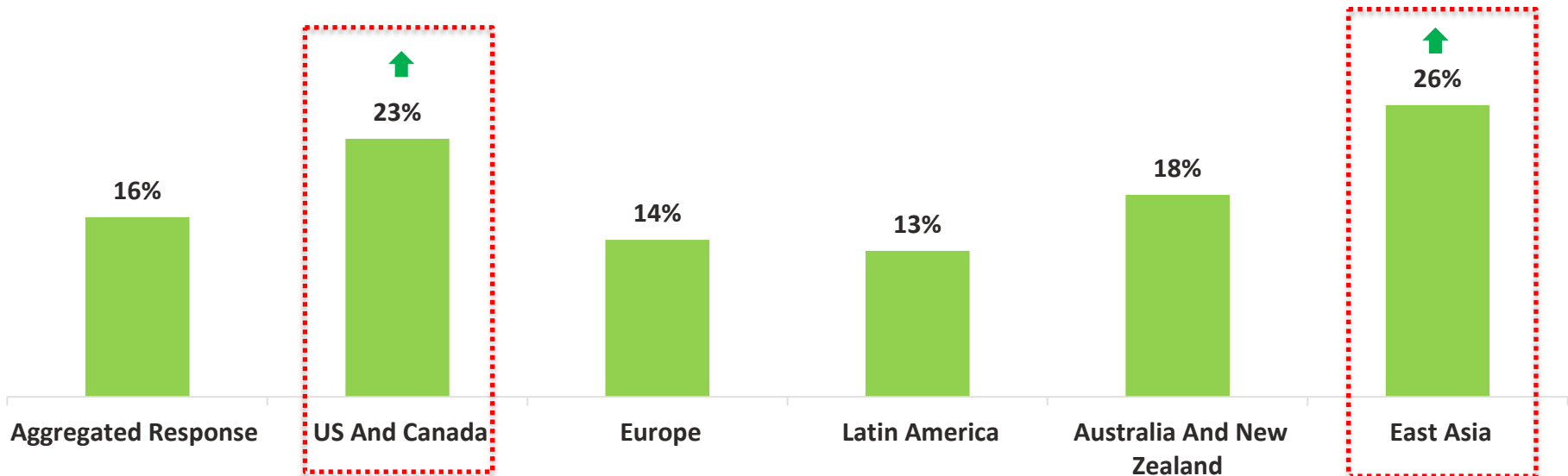
Watching Short Videos Daily or More Frequently	18%
Watching Long Videos Daily or More Frequently	23% ↑

# Nearly a quarter have paid for video content in the US & Canada and East Asia.

- This represents a clear opportunity to monetise video content in these regions.
- Europe and Latin America appear to be more challenging regions in which to monetise, with 14% and 13% respectively having paid for video content.

**Have you ever paid for videos that you have watched on your smartphone? (this could either be paying for mobile video specifically or paying for video that you can watch on any screen, including smartphone)**

**– YES PAID By Region**



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

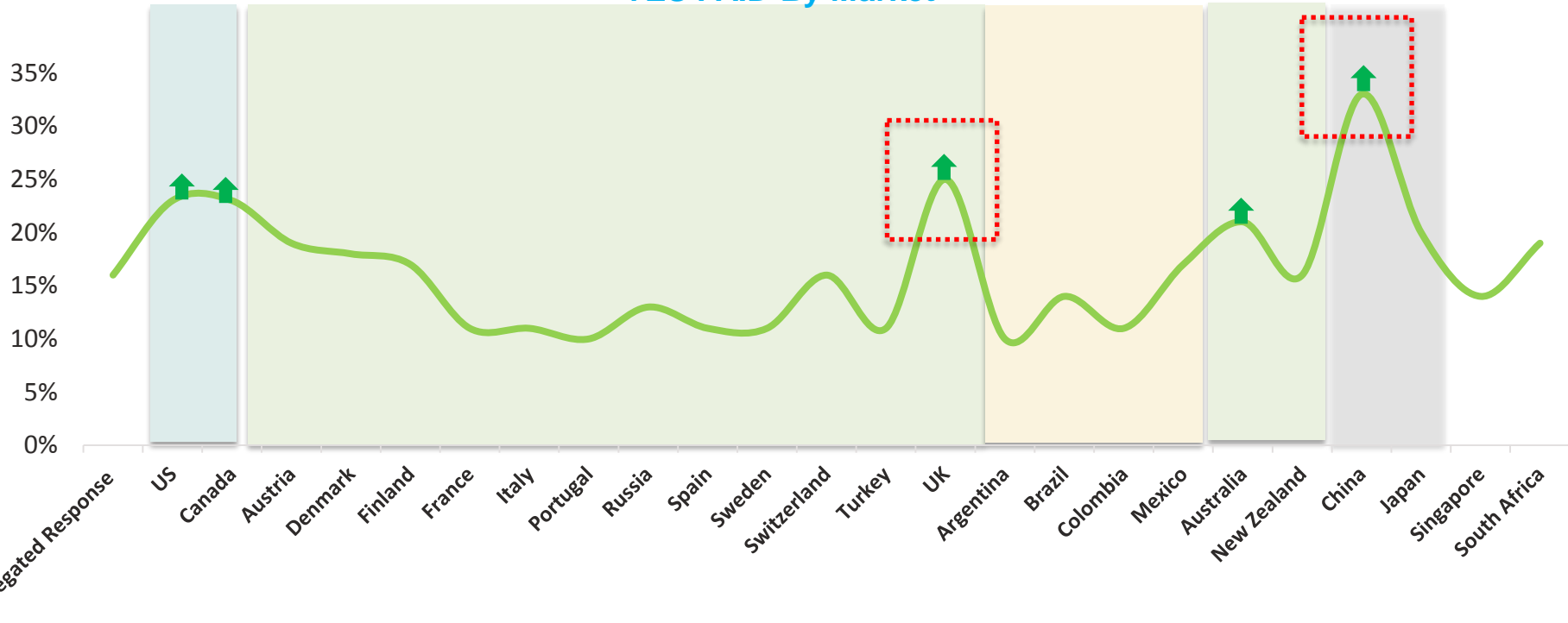
Base: Total respondents 4800, Per market: 200

# The UK is Europe's star market – significantly more have paid for video content there than nearly all other European markets.

- Globally, China is the standout market, with over 30% having paid for video content, representing a clear revenue opportunity.

Have you ever paid for videos that you have watched on your smartphone? (this could either be paying for mobile video specifically or paying for video that you can watch on any screen, including smartphone)

– YES PAID By Market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

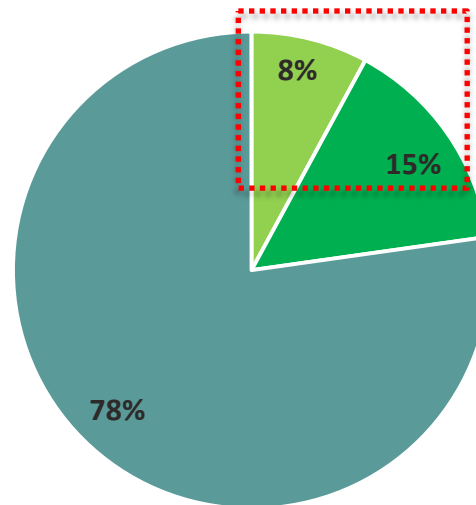
Date: May 2015

Base: Total respondents 4800, Per market: 200

# There are barriers to overcome for further monetisation – 78% state they would rather have free, ad-supported video.

- However, 23% would be willing to pay for video content, with the most popular format that of a monthly subscription fee which is free from advertising.

**Specifically related to mobile video you watch on your smartphone, would you rather:**



- Pay for each mobile video I watch, with no advertising
- Pay a subscription fee for a package of mobile video over a month, with no advertising
- Have free mobile video that has ads in it

Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

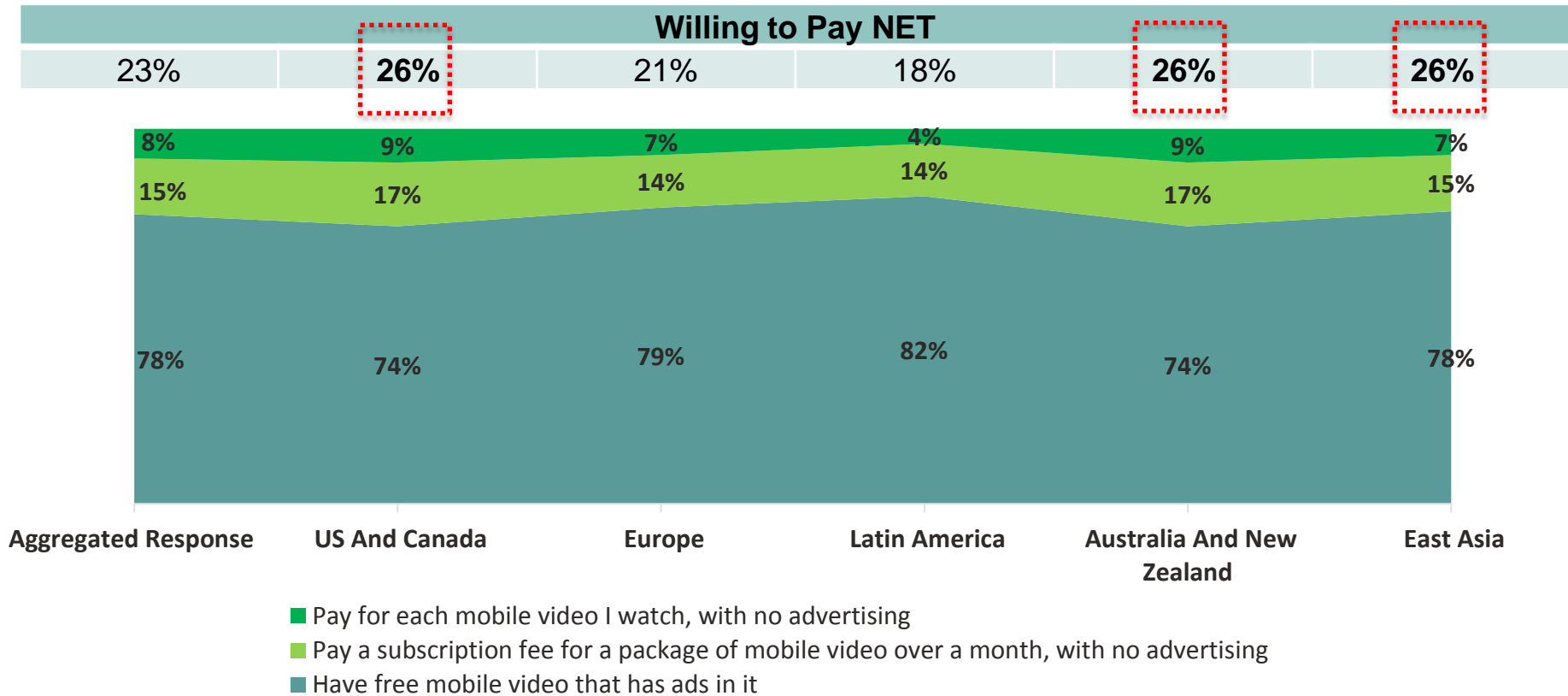
Date: May 2015

Base: Total respondents 4800, Per market: 200

# 26% are willing to pay for mobile video in US & Canada, Australia & New Zealand and East Asia.

- In all regions a subscription fee package is the most desirable format of payment.

Specifically related to mobile video you watch on your smartphone, would you rather: – By Region



- Pay for each mobile video I watch, with no advertising
- Pay a subscription fee for a package of mobile video over a month, with no advertising
- Have free mobile video that has ads in it

Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

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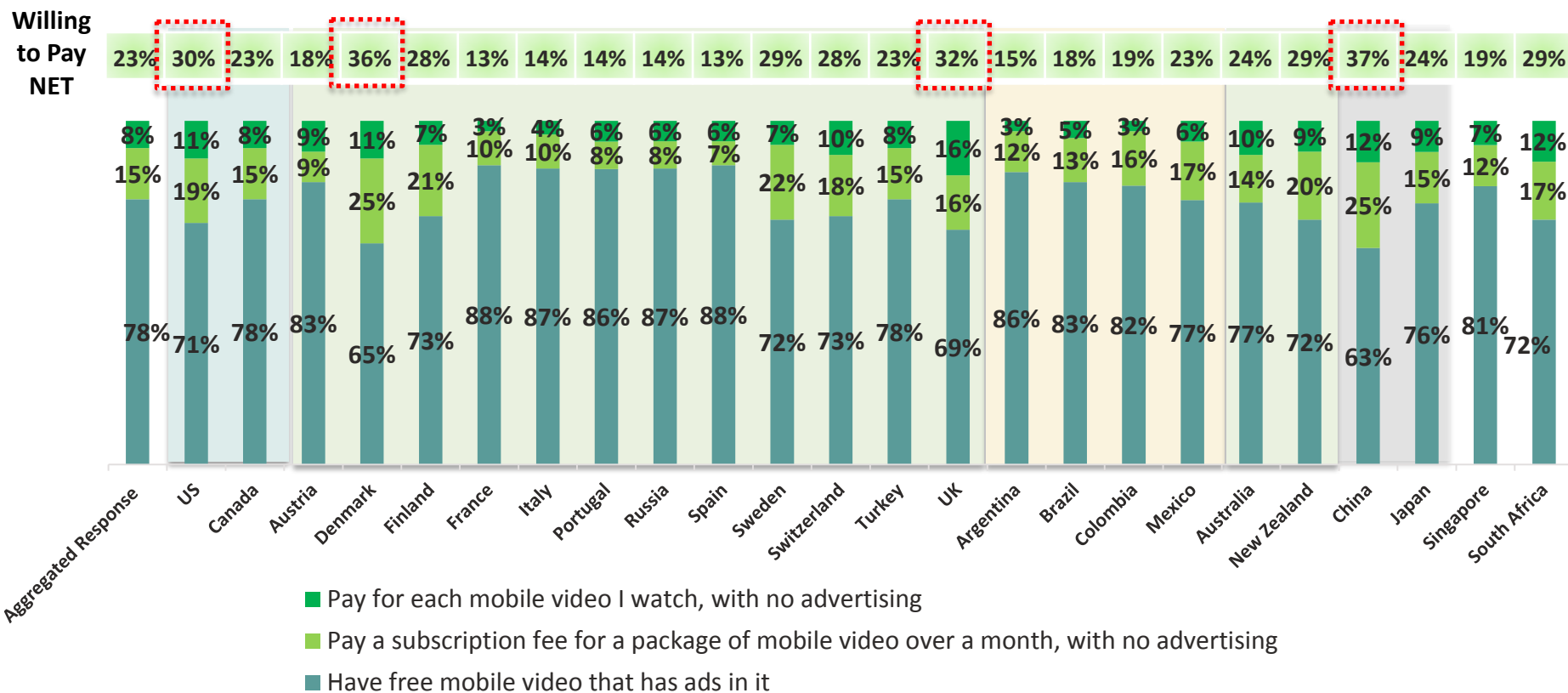
↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.



# A closer look at a country level reveals a clear propensity to a direct payment model in China, where 37% are willing to pay.

- In Europe, there are some key markets which could be leveraged first, especially Denmark and the UK.

## Specifically related to mobile video you watch on your smartphone, would you rather: – By Market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa Spain Sweden Switzerland Turkey UK US  
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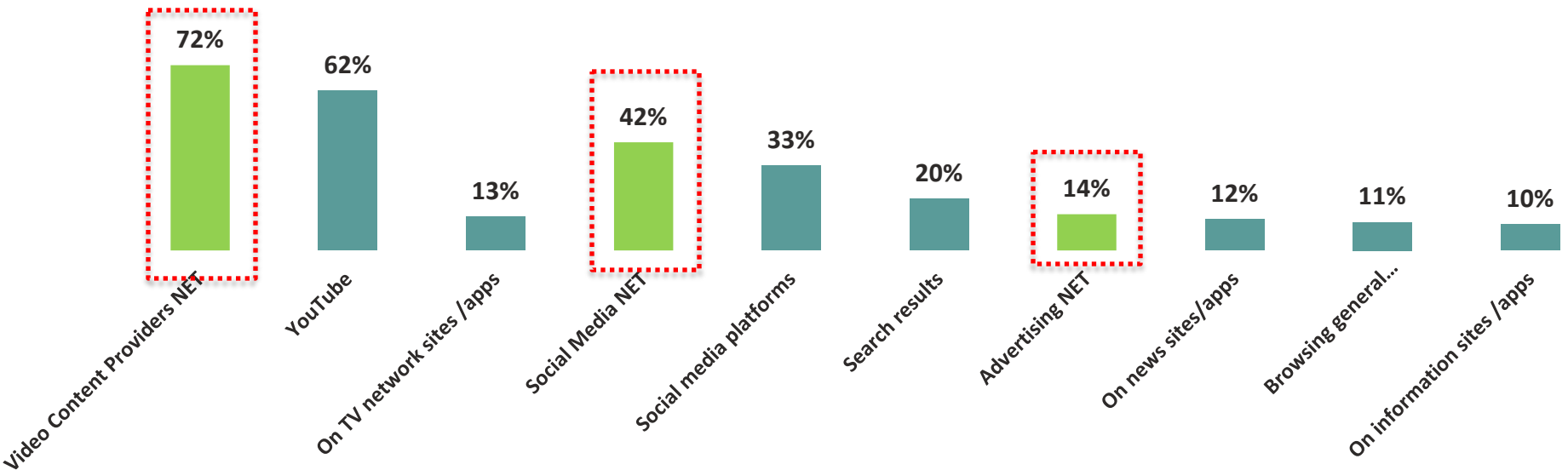
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**Mobile Video– How/where  
do viewers discover mobile  
video content.**

# At 72% the primary source of video content is specific/specialised video content providers.

- YouTube leads the way among specific/specialised video content providers – 62% state this is where they find mobile video. This is particularly striking given some markets where YouTube is not available.
- Social media also plays a key role with 42% of smartphone users finding video content via this channel.
- Pleasingly, advertising also appears to have some influence – 14% state they have found mobile video they watch via advertising.

## How/where do you typically find the videos that you watch on your smartphone?



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

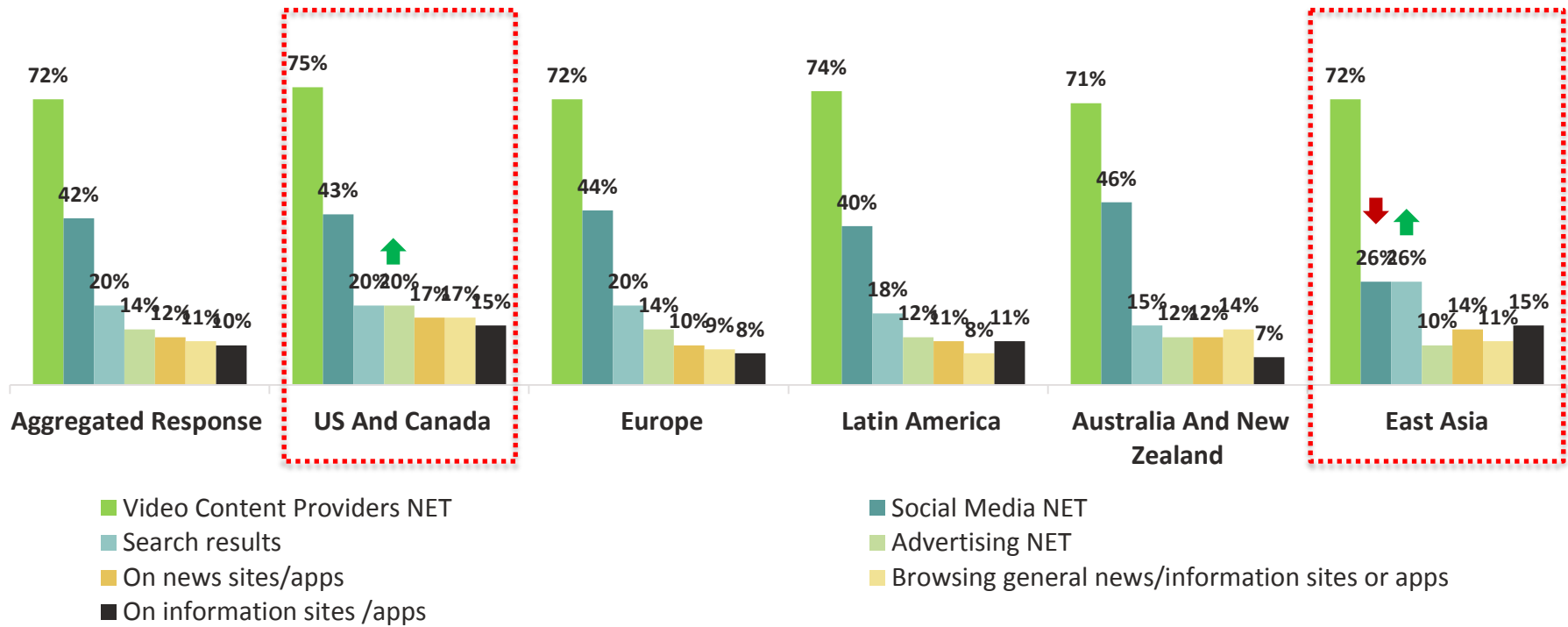
Base: Total respondents 4800, Per market: 200

↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

# While advertising has significantly more influence in the US & Canada when locating mobile videos to watch.

- In East Asia, while social media is a source for finding video content, it is used significantly less than all other regions.

How/where do you typically find the videos that you watch on your smartphone?  
 – NET SCORES By Region

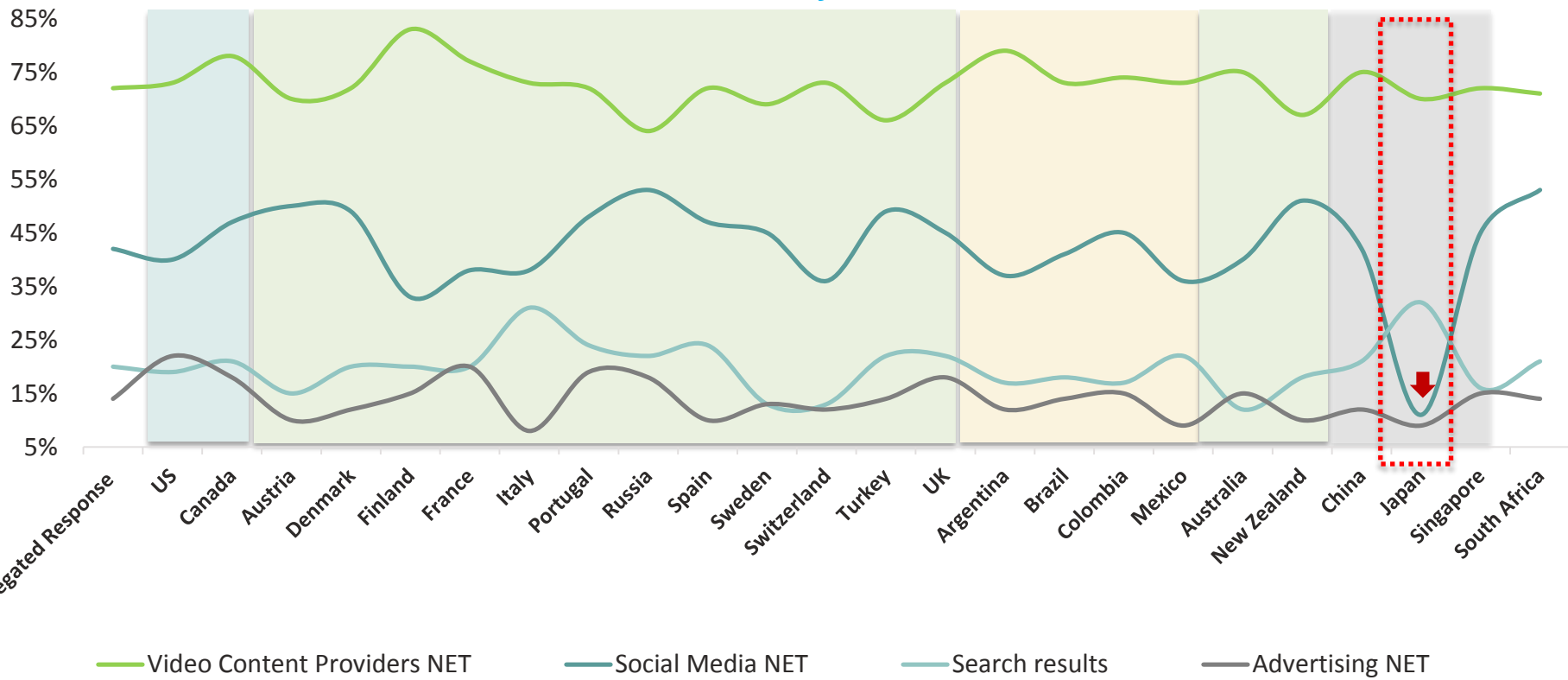


Country: Total, Argentina, Australia, Austria, Brazil, Canada, China, Colombia, Denmark, Finland, France, Italy, Japan, Mexico, New Zealand, Portugal, Russia, Singapore, South Africa, Spain, Sweden, Switzerland, Turkey, UK, US  
 Date: May 2015  
 Base: Total respondents 4800, Per market: 200

# Japan is behind the lower usage of social media as a source for mobile video content in East Asia.

- Far fewer Japanese smartphone owners use social media to find mobile video content.
- By contrast, Japan and Italy show the highest propensity to find videos via search.

How/where do you typically find the videos that you watch on your smartphone? – NET SCORES By Market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa Spain Sweden Switzerland Turkey UK US  
 Date: May 2015  
 Base: Total respondents 4800, Per market: 200

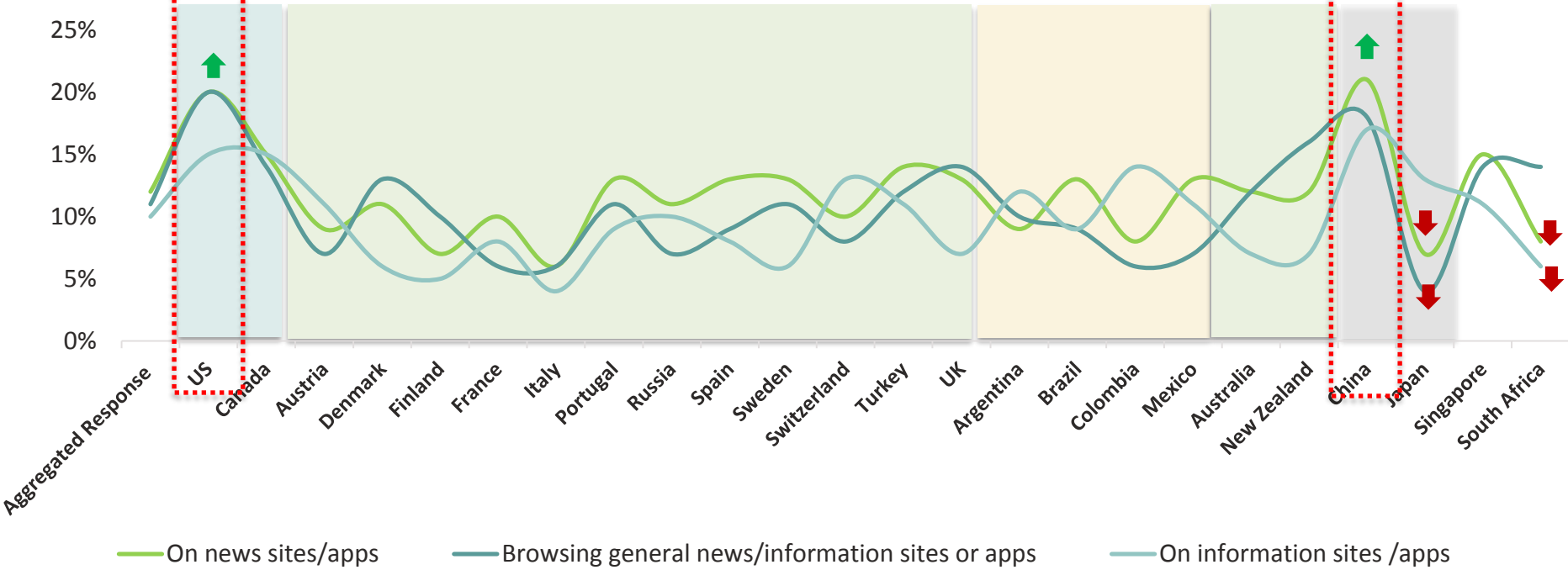


↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

# Both the in the US and China, information sites/apps and news (both general and specific) play a significantly more active role.

- There is significantly higher use of these sources to find mobile video in both these markets.
- While other markets also uses these sources, none do to the same extreme as in China and the US.

How/where do you typically find the videos that you watch on your smartphone? – NET SCORES By Market



↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.



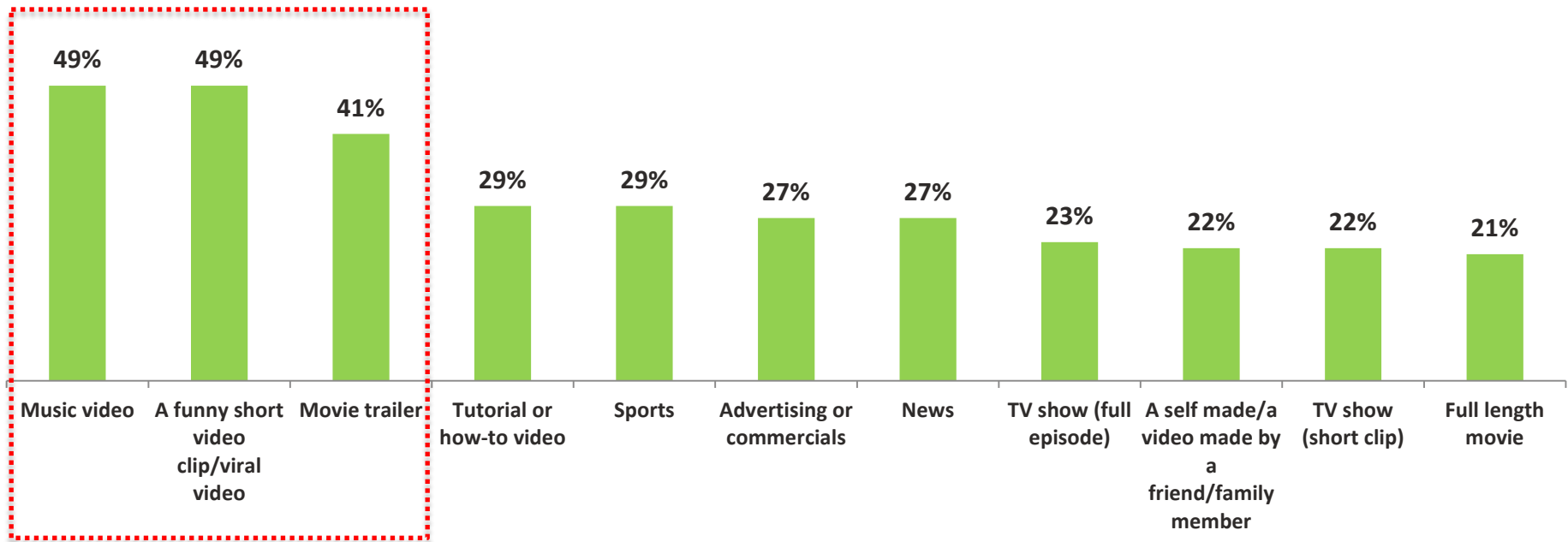
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**Mobile Video– What content genres do viewers watch?**

# Music and 'comedy clips' are the most frequently watched content, followed by movie trailers.

- Tutorials and sports videos are also popular.
- 27% have watched advertising or commercials.

Which of the following types of video have you watched on your smartphone in the past three months? (check all that apply)



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

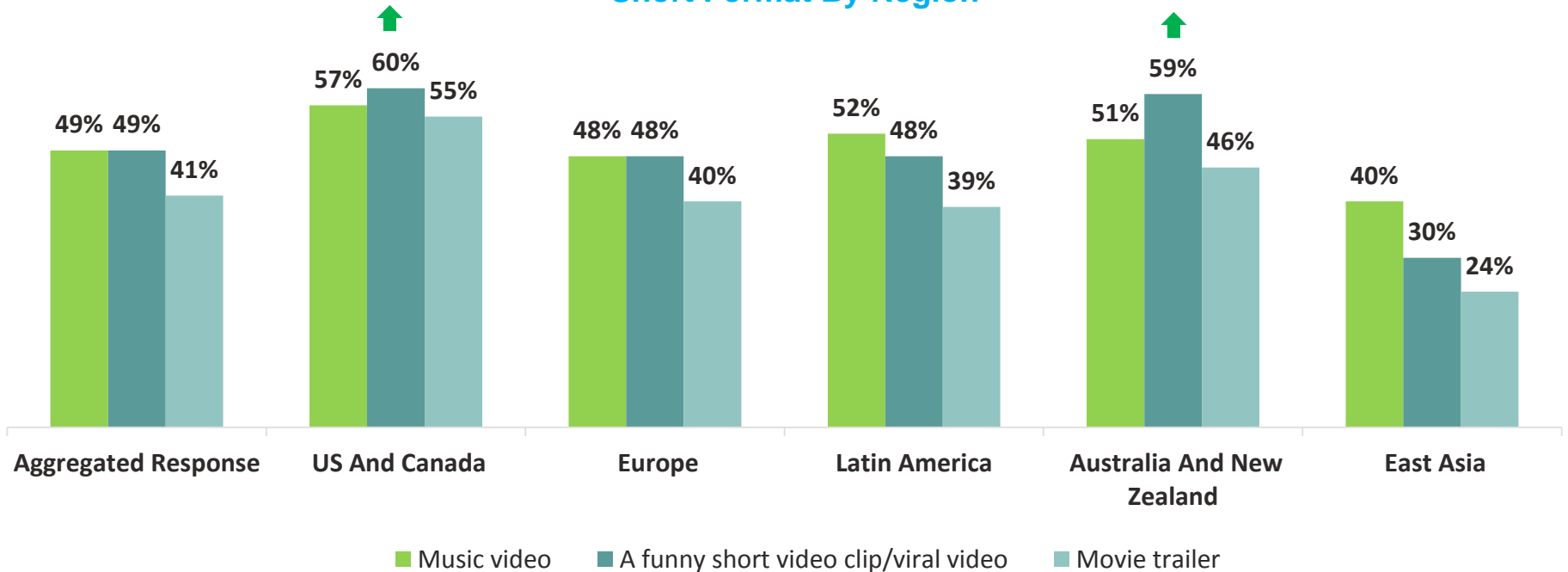
Base: Total respondents 4800, Per market: 200

# Looking at 'short video formats' we see the popularity of music, 'comedy clips' and movie trailers across all regions.

- The exception is East Asia, where these formats are less popular than in all other regions.

Which of the following types of video have you watched on your smartphone in the past three months? (check all that apply)

## – Short Format By Region



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

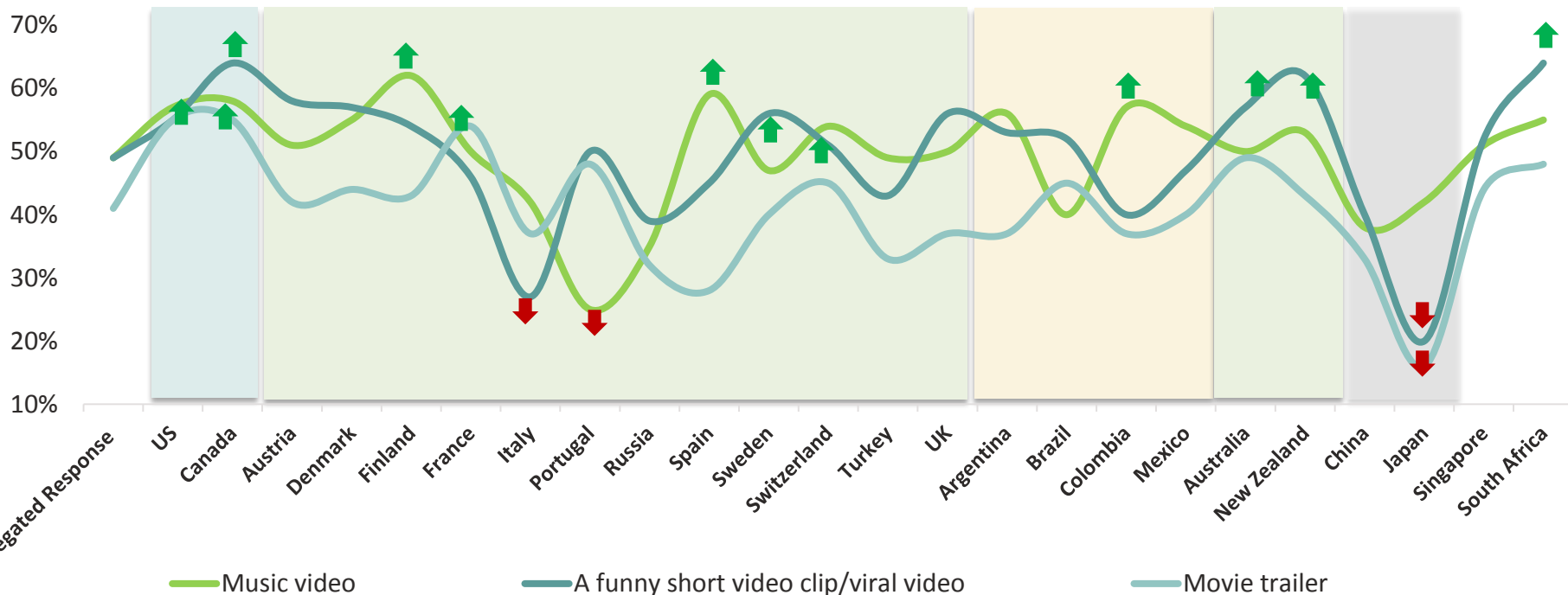
Base: Total respondents 4800, Per market: 200

# Music and 'comedy clips' are the short video formats watched across all markets.

- South Africa, Canada, Australia and New Zealand have a strong desire for 'comedy clips', with these markets having the highest consumption of this video genre.
- Tastes in video formats vary widely from country to country.

Which of the following types of video have you watched on your smartphone in the past three months? (check all that apply)

## - Short Format By Market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

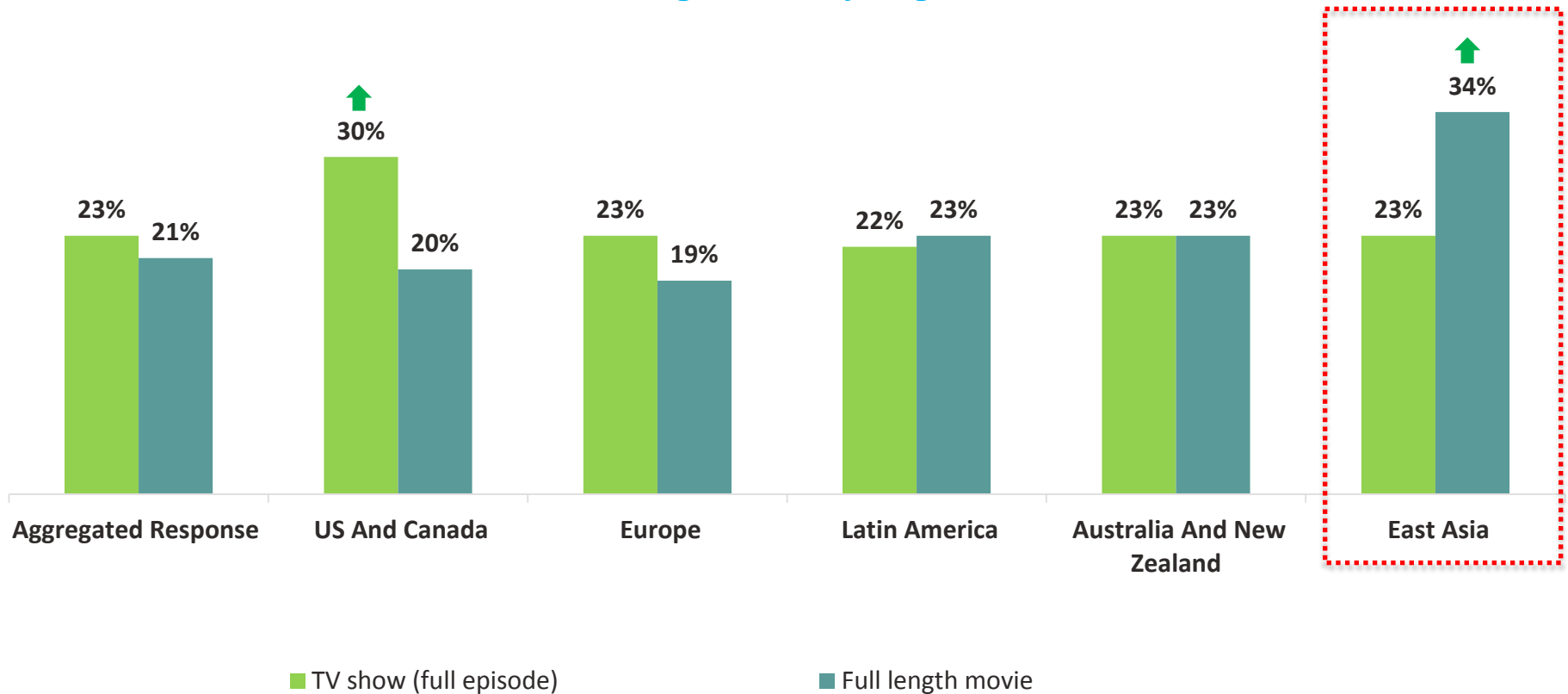
Base: Total respondents 4800, Per market: 200



↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

# Looking at 'long video formats', East Asia is the heaviest consumer of full length movies.

Which of the following types of video have you watched on your smartphone in the past three months? (check all that apply)  
– Long Format By Region



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

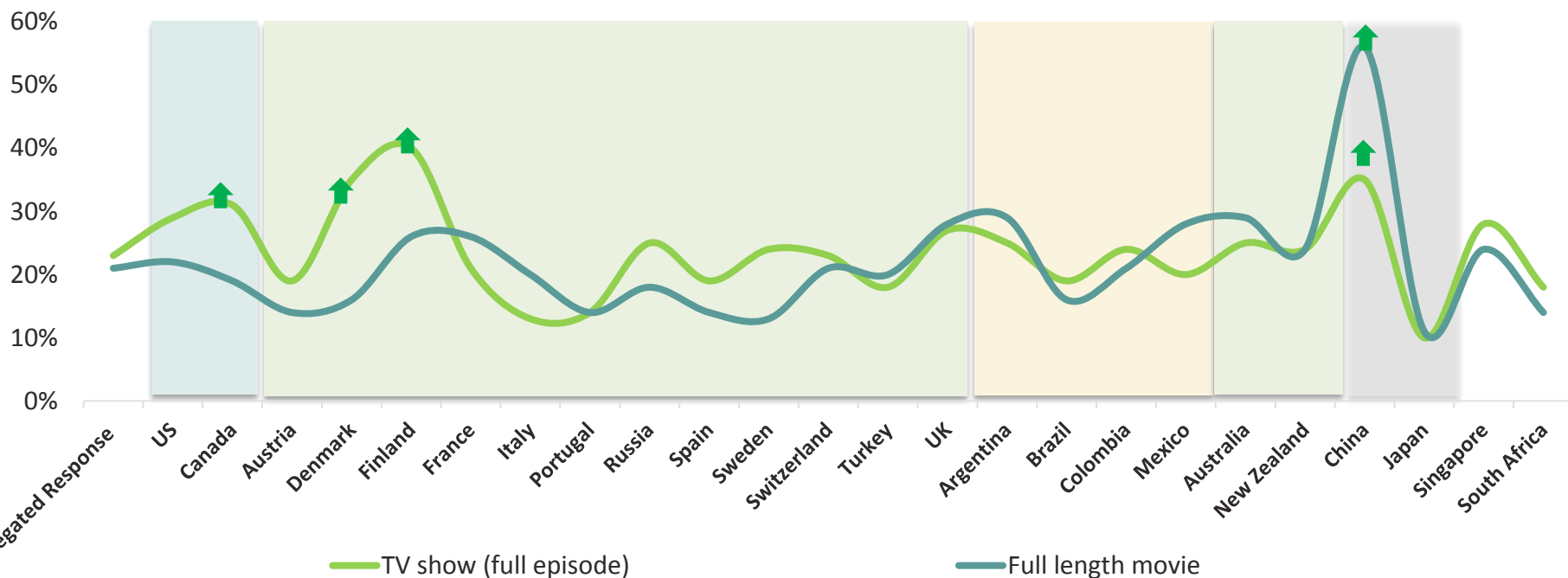
Base: Total respondents 4800, Per market: 200

# China's thirst for both TV shows and full-length movies is the driving force behind this.

- Interestingly, TV shows are the most viewed long video format across many countries, perhaps reflective of the many different services offering this genre.

Which of the following types of video have you watched on your smartphone in the past three months? (check all that apply)

## – Long Format By Market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200



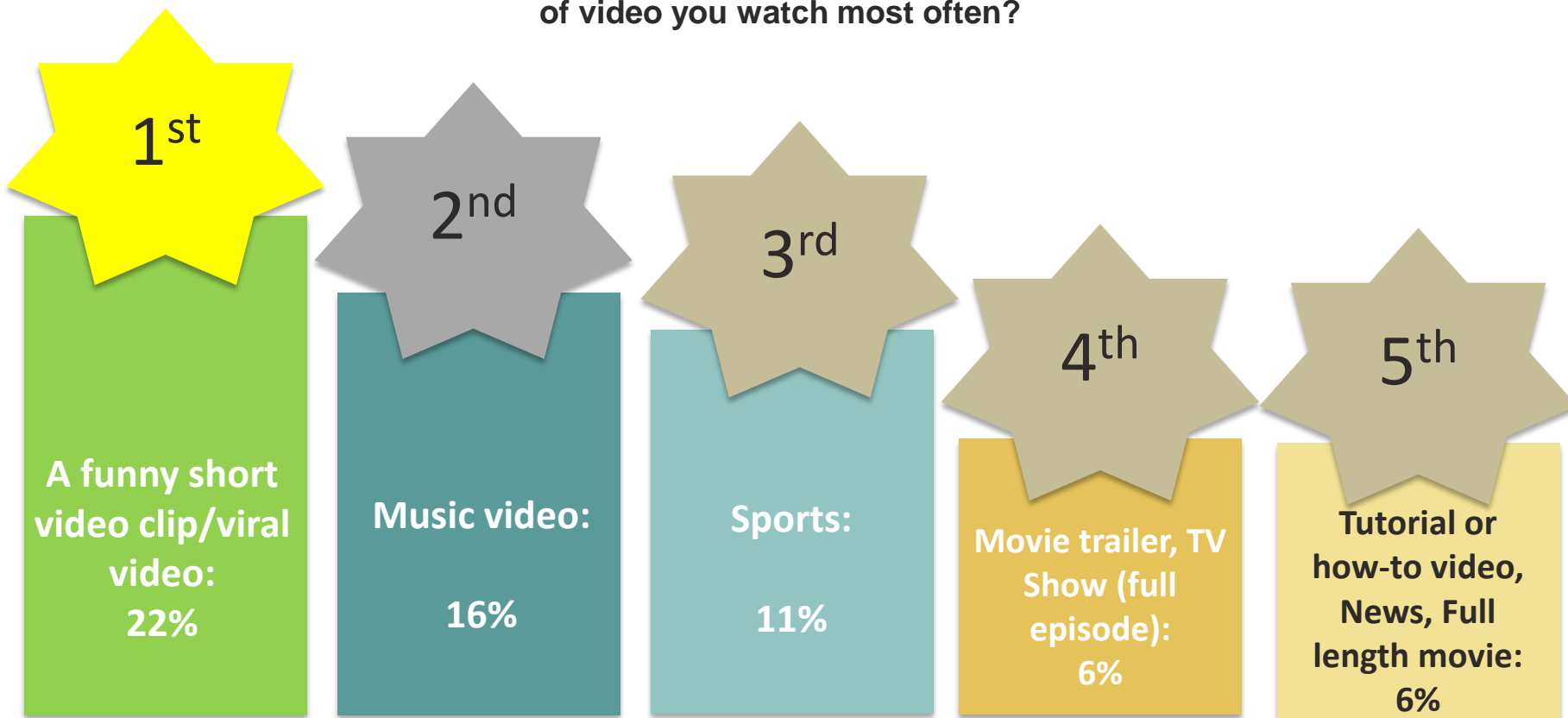
↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.



In terms of most-watched genre, 'Comedy clips' are the most preferred genre, followed by music videos.

- Sports are the 3<sup>rd</sup> most popular genre.

And of the types of video that you normally watch on your smartphone, which is the type of video you watch most often?



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

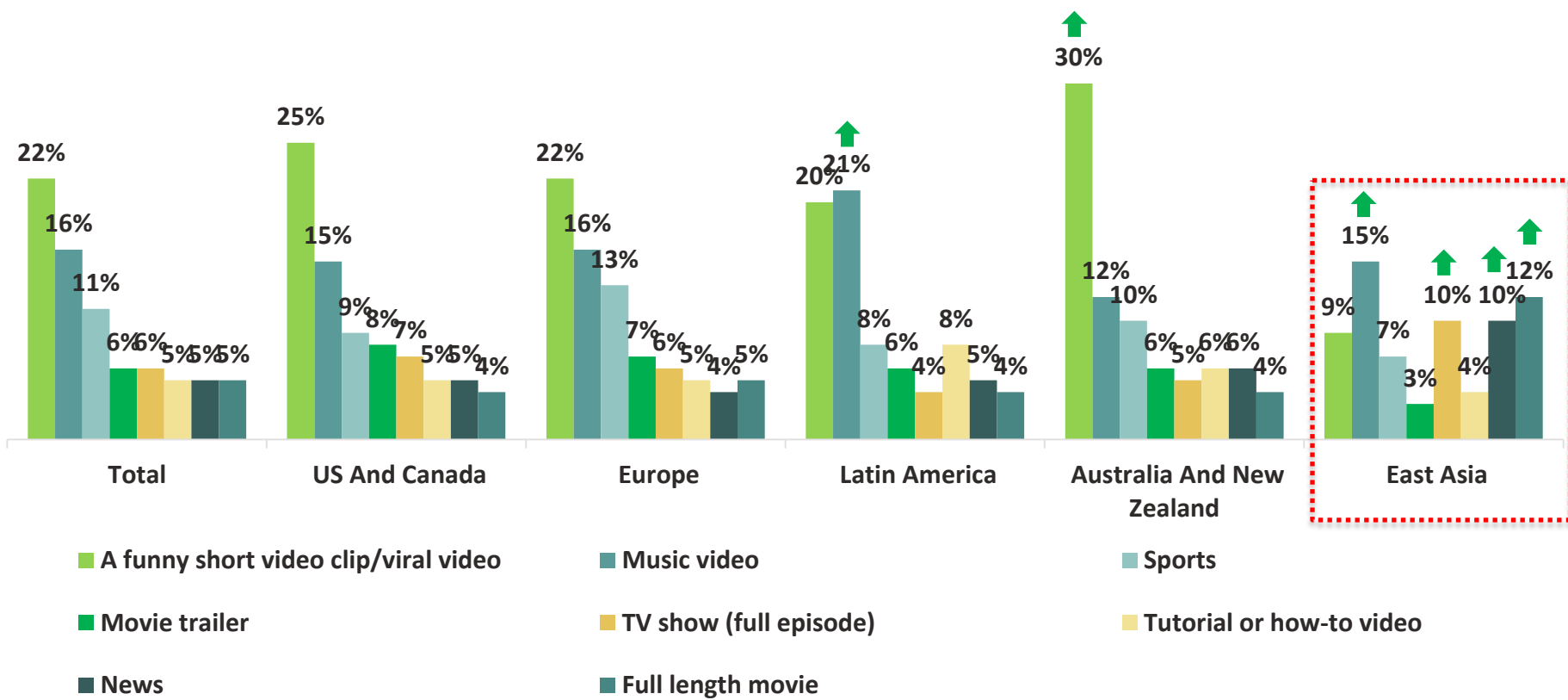
Date: May 2015

Base: Total respondents 4800, Per market: 200

# East Asia, however, bucks the global trend, with several genres preferred over 'comedy clips'

- Australia & New Zealand have the strongest preference for 'comedy clips'.
- Latin America and East Asia prefer music videos over funny video clips.

And of the types of video that you normally watch on your smartphone, which is the type of video you watch most often? – By Region



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

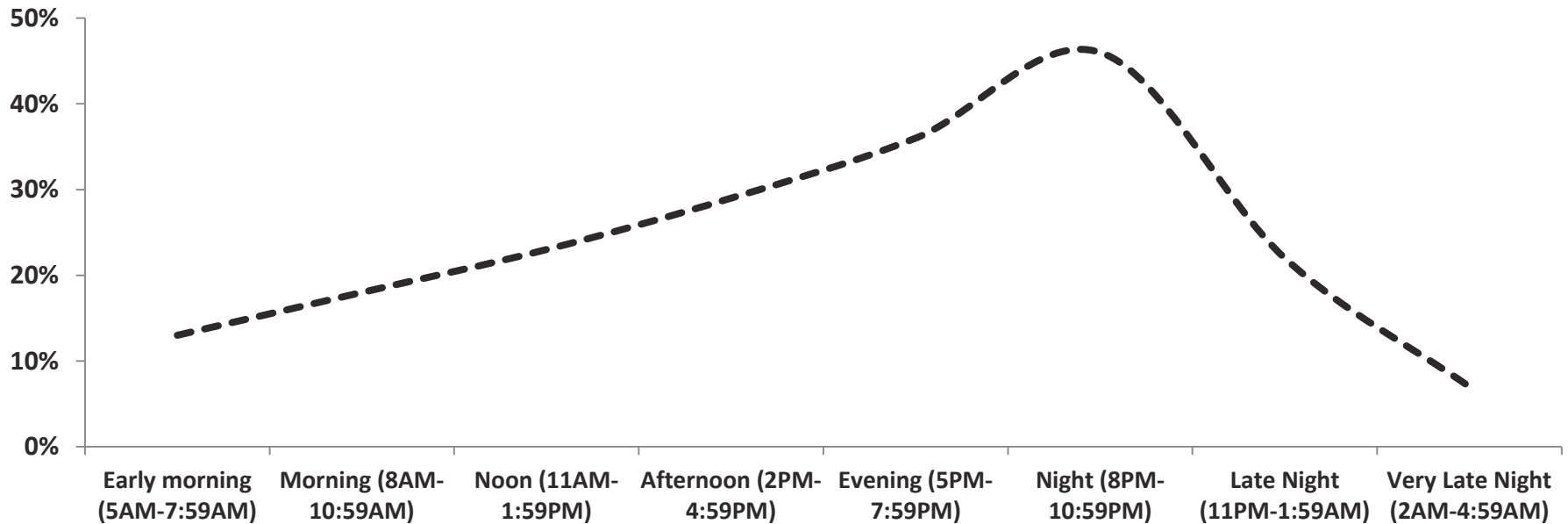
Base: Total respondents 4800, Per market: 200

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**Mobile Video– When and  
where do viewers watch  
mobile video?**

Consumption of mobile video is a daily activity. Starting in the morning and rising over the course of the day to an evening peak.

What time or times of day do you most frequently watch videos on your smartphone? (please pick up to THREE)



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200

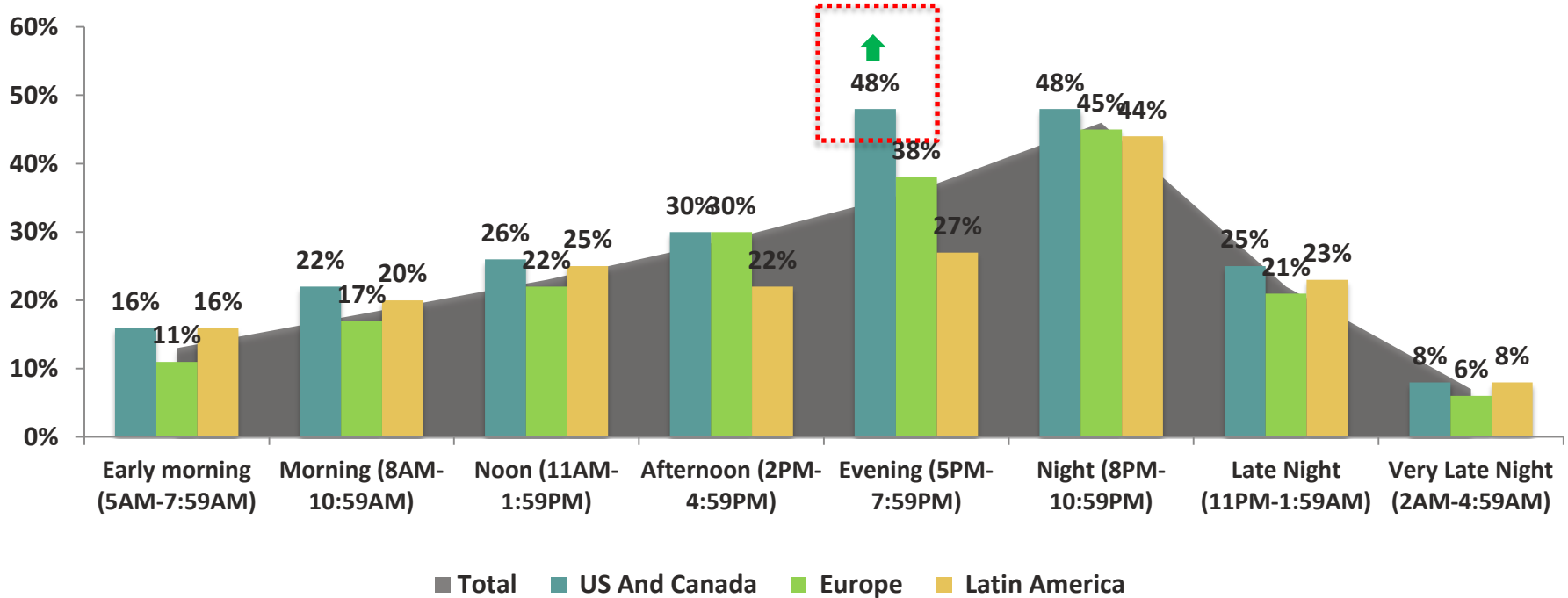


↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

# While all regions (and markets) follow this pattern interestingly the US & Canada see consumption peak earlier in the evening.

- This double peak as such means that video viewing occurs over a longer evening period in this region.

What time or times of day do you most frequently watch videos on your smartphone? (please pick up to THREE) – By Region



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200

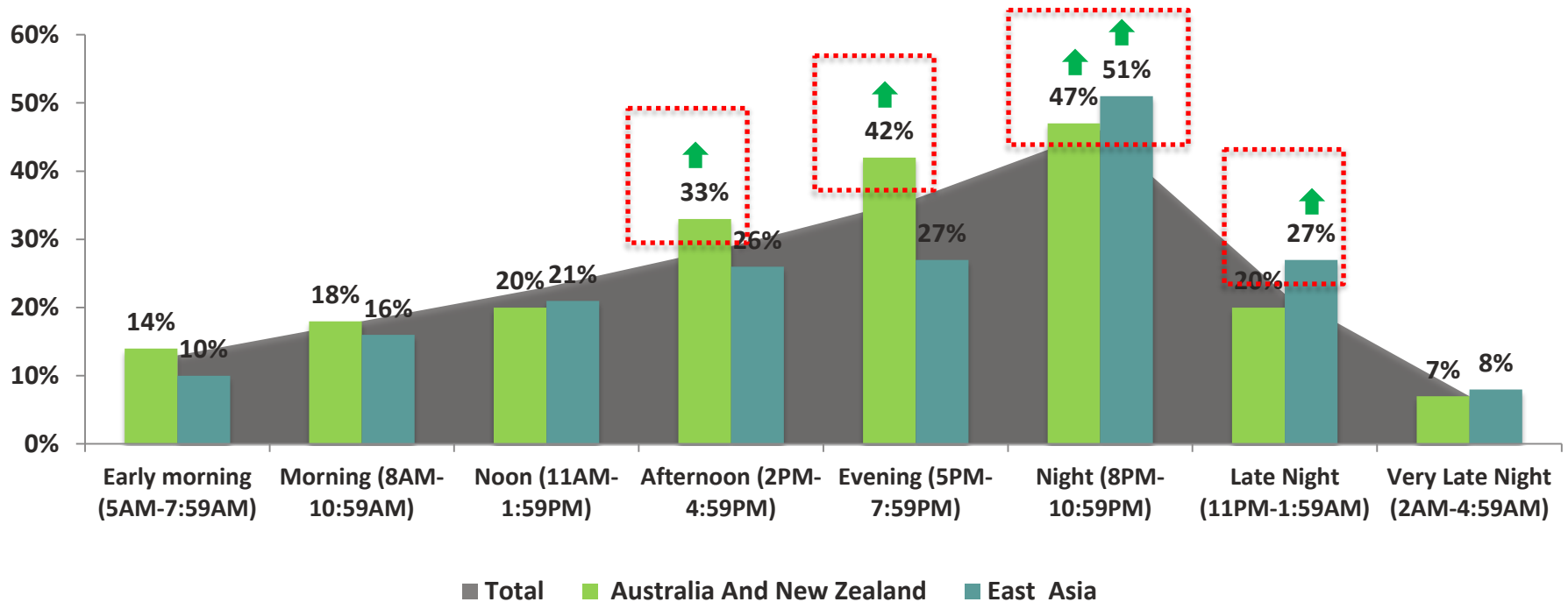


↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

# While in Australia & New Zealand a similar pattern is seen – but with stronger than average levels in the afternoon also present.

- Interestingly, in East Asia significantly more late night video viewing occurs.

What time or times of day do you most frequently watch videos on your smartphone? (please pick up to THREE) – By Region



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200



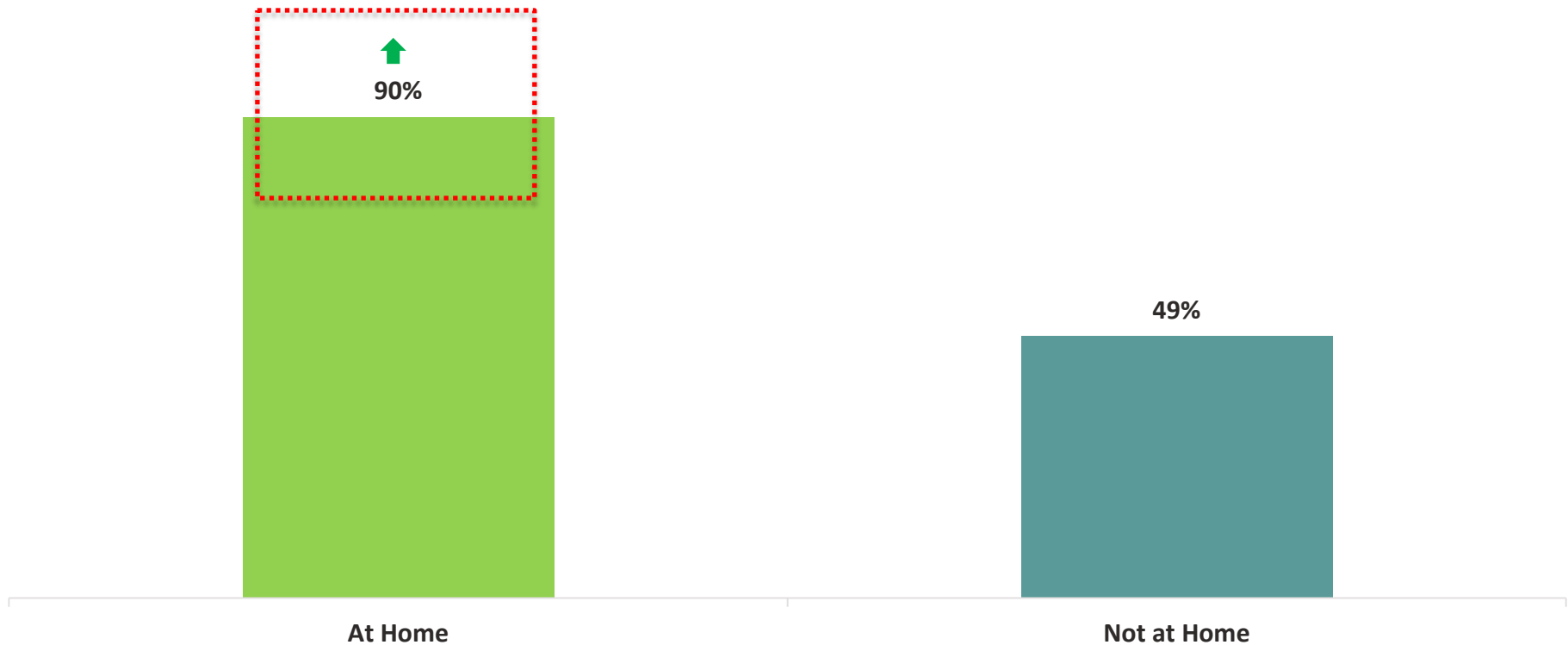
↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.



# Across all regions and markets we studied, mobile video viewing occurs primarily at home.

- Significantly more viewers watch mobile video content At Home versus Not at Home.

In which of the following locations have you watched videos on your smartphone in the past three months?



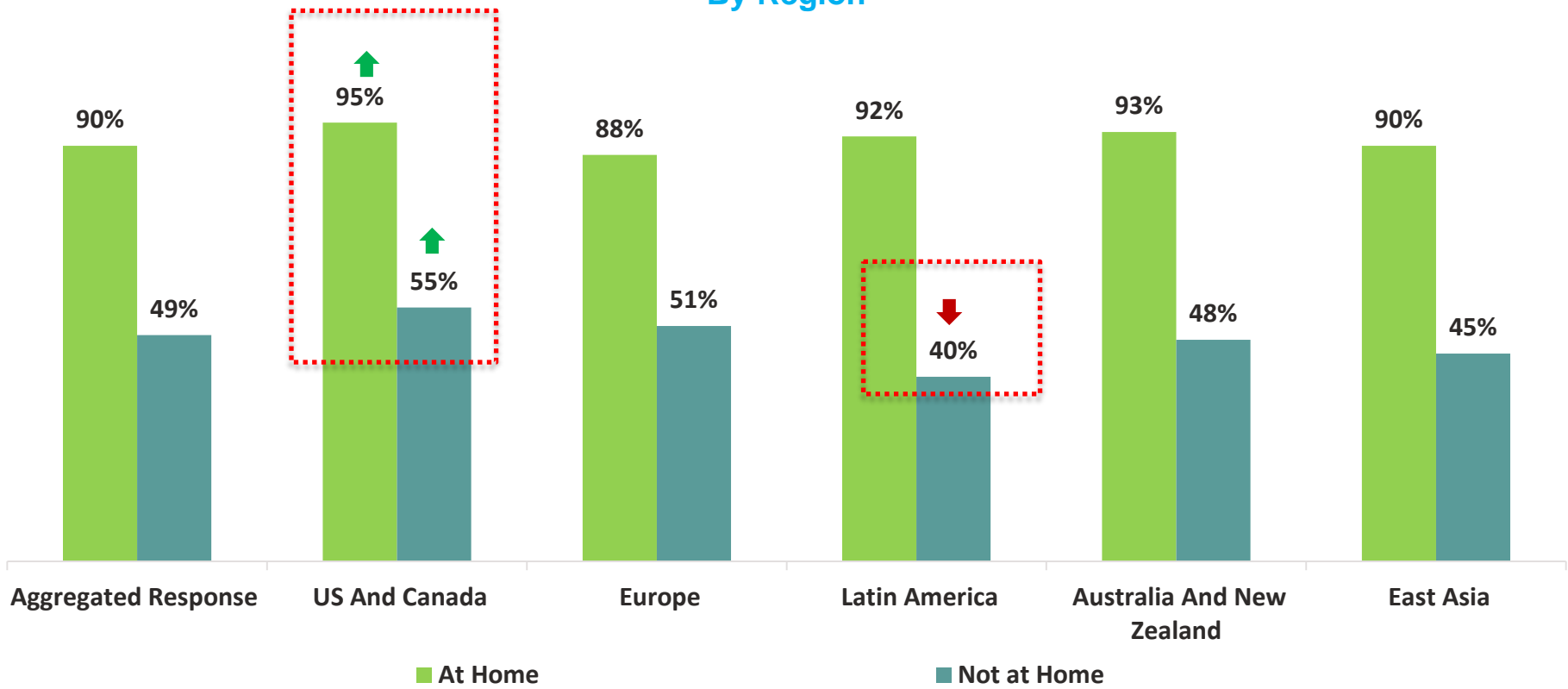
Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa Spain Sweden Switzerland Turkey UK US  
Date: May 2015  
Base: Total respondents 4800, Per market: 200

This is especially true in the case of the US & Canada, which also have the highest video viewing away from home.

- Latin America has the lowest levels of away-from-home viewing, perhaps due to connectivity issues.

In which of the following locations have you watched videos on your smartphone in the past three months?

- By Region



Country: Total, Argentina, Australia, Austria, Brazil, Canada, China, Colombia, Denmark, Finland, France, Italy, Japan, Mexico, New Zealand, Portugal, Russia, Singapore, South Africa,

Spain, Sweden, Switzerland, Turkey, UK, US

Date: May 2015

Base: Total respondents 4800, Per market: 200

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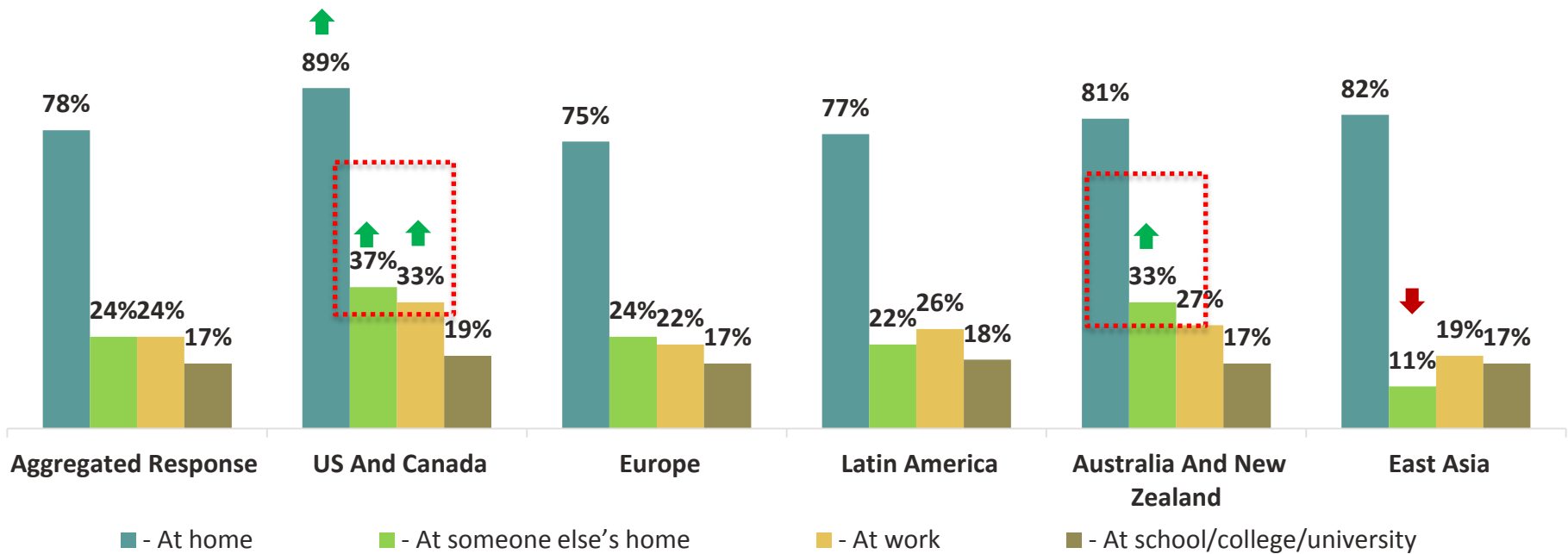
↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

# While at home is the preferred viewing location regionally, significant numbers watch at others homes in some regions.

- Namely US & Canada and Australia & New Zealand, where 37% and 33% respectively state they watch mobile videos at someone else's home.

In which of the following locations have you watched videos on your smartphone in the past three months?

- Mobile Video Viewing in Four Key Venues by Region



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200



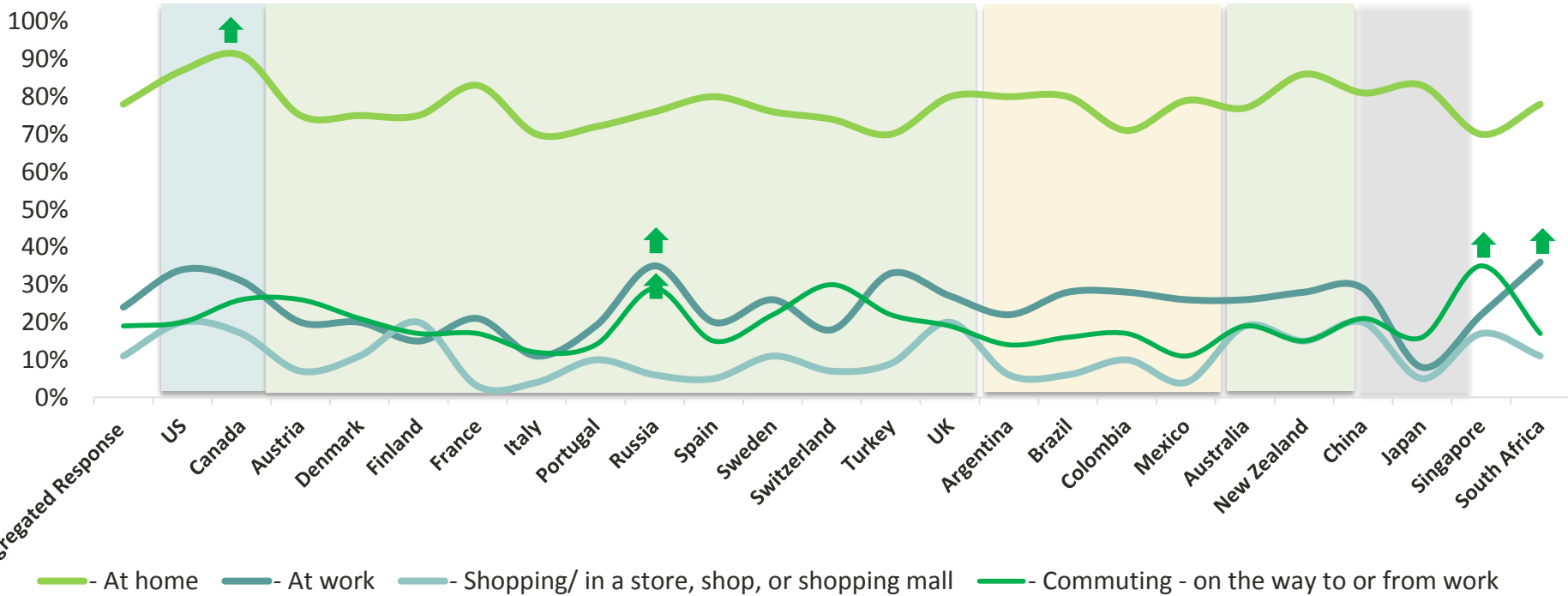
↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

# Russia and Singapore show the highest levels of watching mobile video while commuting.

- Russia and South Africa have the highest levels of watching mobile videos while at work.

In which of the following locations have you watched videos on your smartphone in the past three months?

## – Mobile Video Viewing in Four Key Venues by Market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200



↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

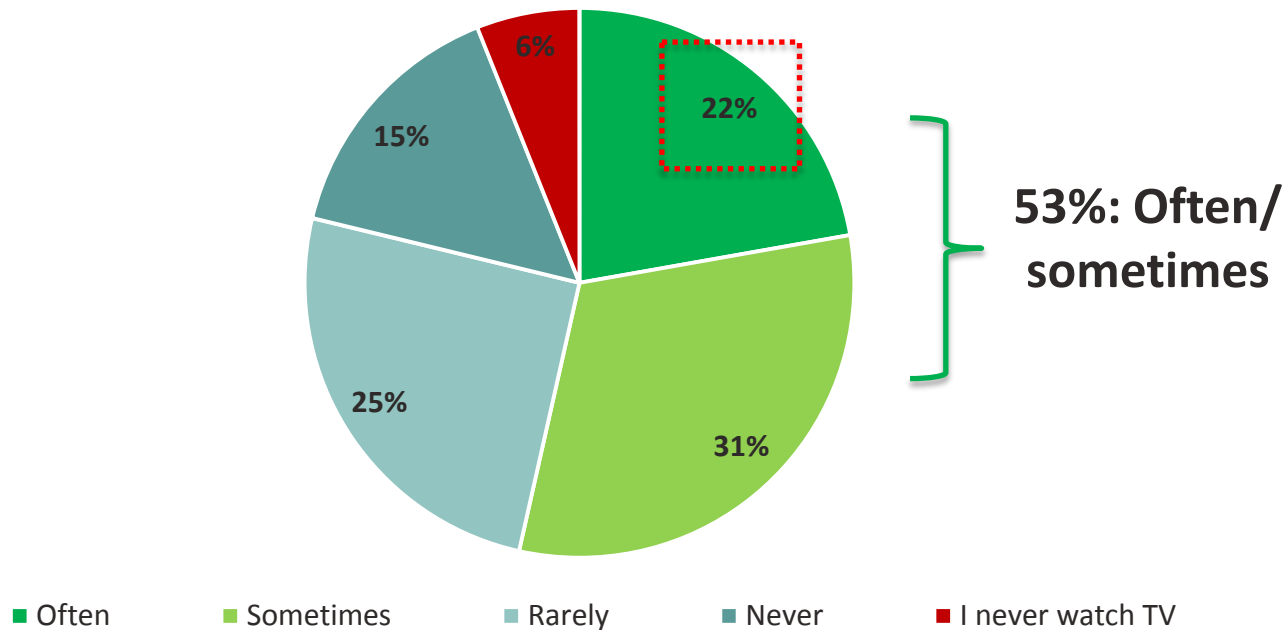
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## **Mobile Video– Dual-screen video viewing**

# Dual screening occurs globally. 22% often watch video on their phone while watching TV.

- Frequent video users are significantly more likely to engage in this dual screen video activity.
- 29% of frequent short video watchers say they have watched video content on their smartphone while watching TV. Similarly, 33% of frequent long video watchers say the same.

## How often do you watch video on your smartphone while you are watching TV?



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

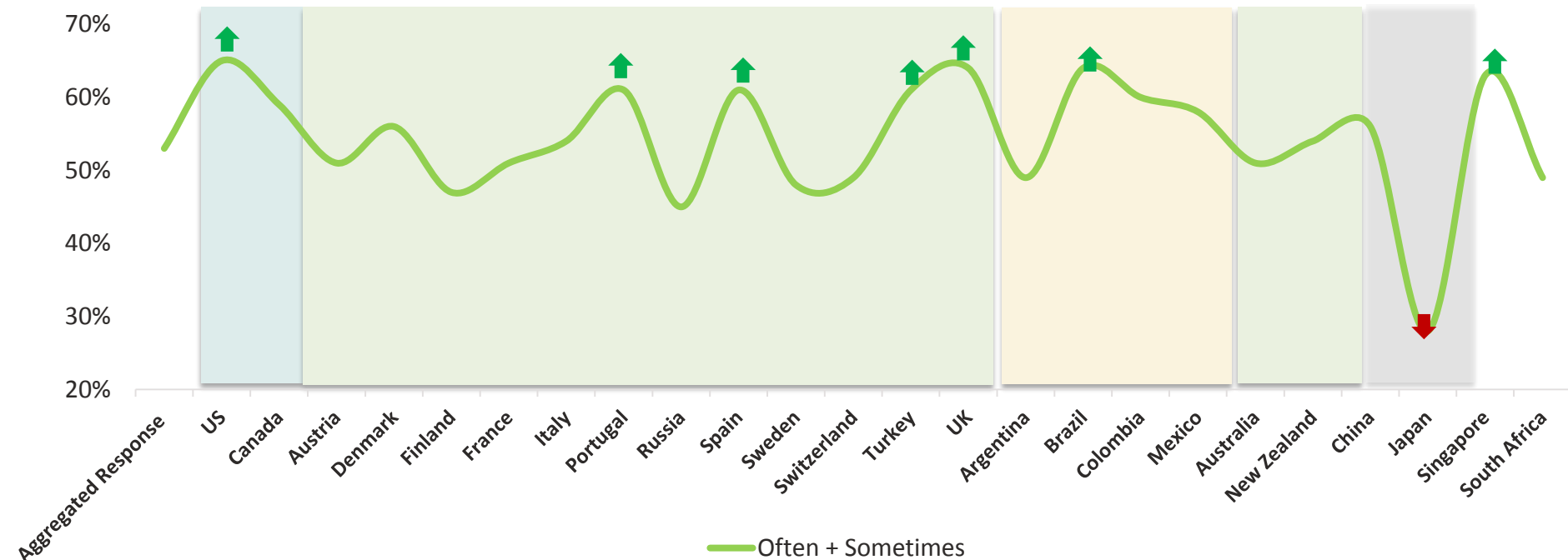
Date: May 2015

Base: Total respondents 4800, Per market: 200

# This trend is evident across all markets measured, with the exception of Japan.

- Does this activity offer a pathway to creating more engaging and creative multimedia campaigns?
- Or is it a challenge to marketers trying to catch a viewer's diverted attention?

## And how often do you watch video on your smartphone while you are watching TV? – By Market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa  
Spain Sweden Switzerland Turkey UK US  
Date: May 2015  
Base: Total respondents 4800, Per market: 200



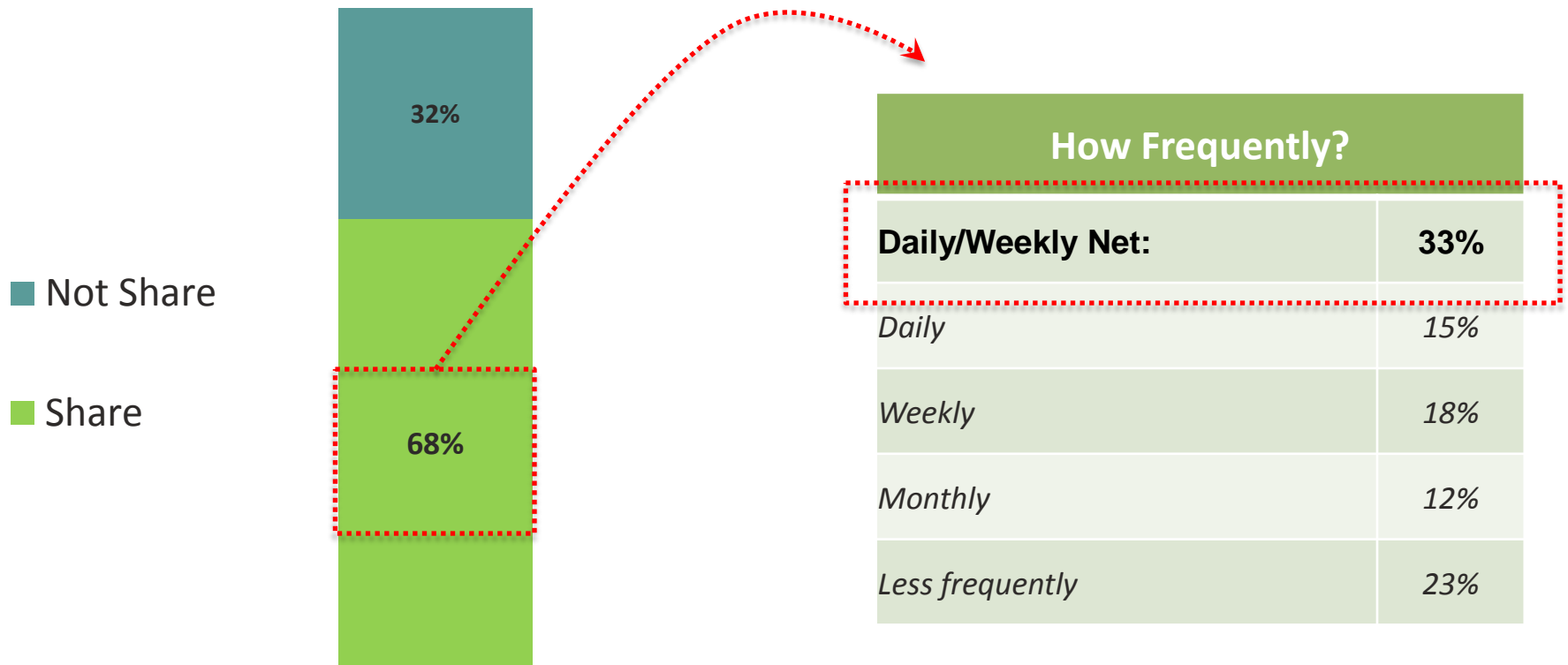
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## **Mobile Video– Sharing mobile video content**

# 68% of smartphone users share mobile videos with others. 33% share videos on a weekly/daily basis.

- It is important to note that 23% share infrequently.

## Do you share mobile videos with others? If so how often?



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

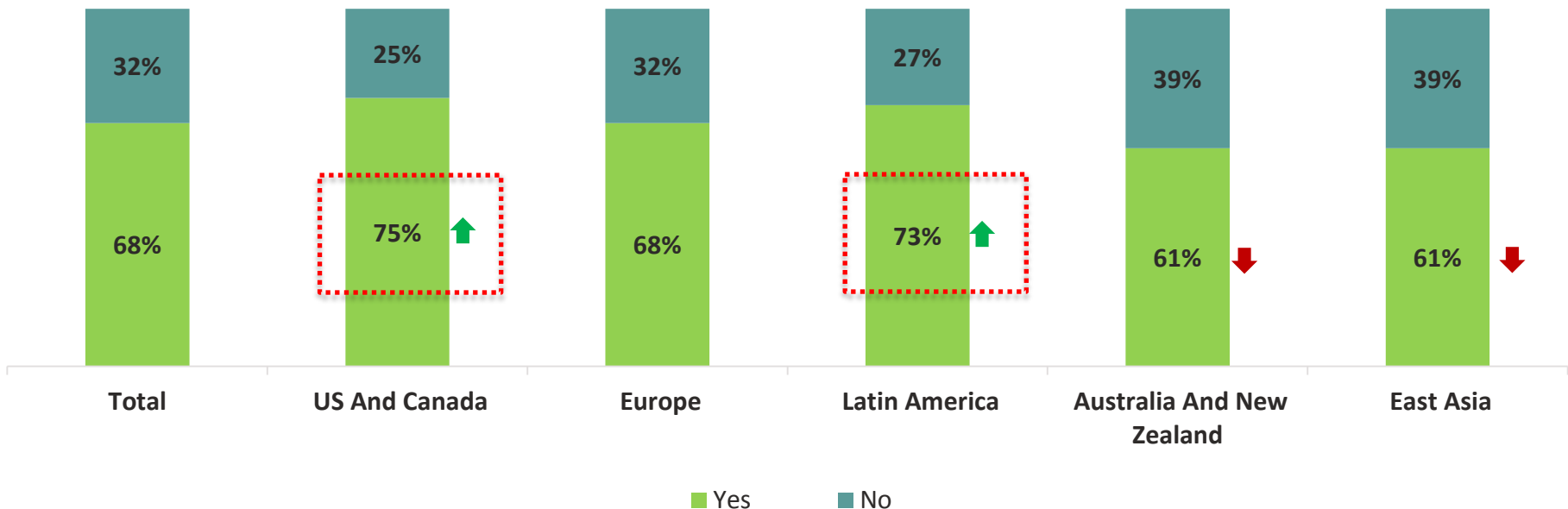
Date: May 2015

Base: Total respondents 4800, Per market: 200

# Three-quarters share video in the US & Canada and Latin America.

- While 61% share in Australia & New Zealand and East Asia. This is significantly less than the global average.

## Do you share mobile videos with others? If so how often? – By Region



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

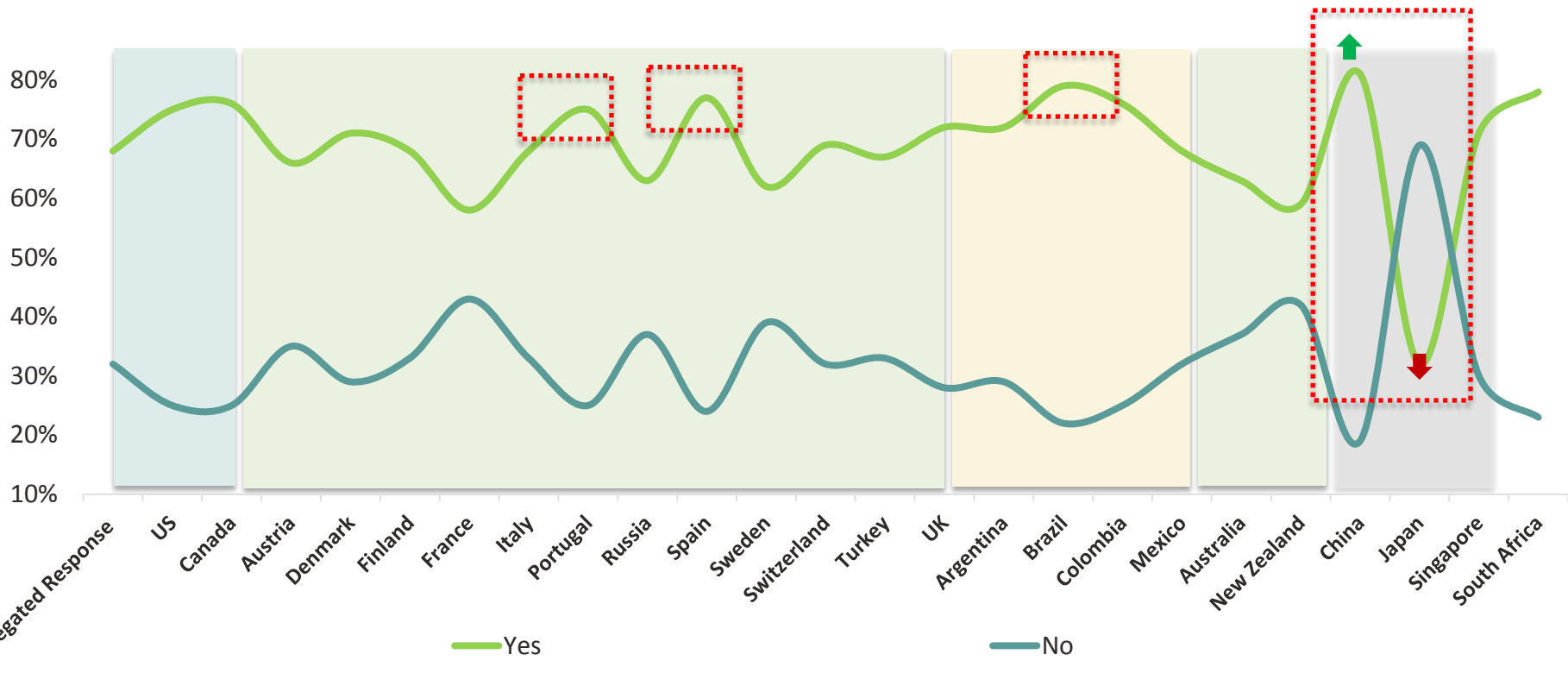
Date: May 2015

Base: Total respondents 4800, Per market: 200

# At 81%, China has the highest levels of sharing mobile video. By contrast, Japan has the lowest.

- Could the low levels of sharing in Japan be influenced by social and economic factors?
- Japan also showed low levels of finding video via social media.
- Italy and Spain are the standout sharers in Europe, Brazil and Colombia in Latin America.

## Do you share mobile videos with others? If so how often? – By Market



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200

↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

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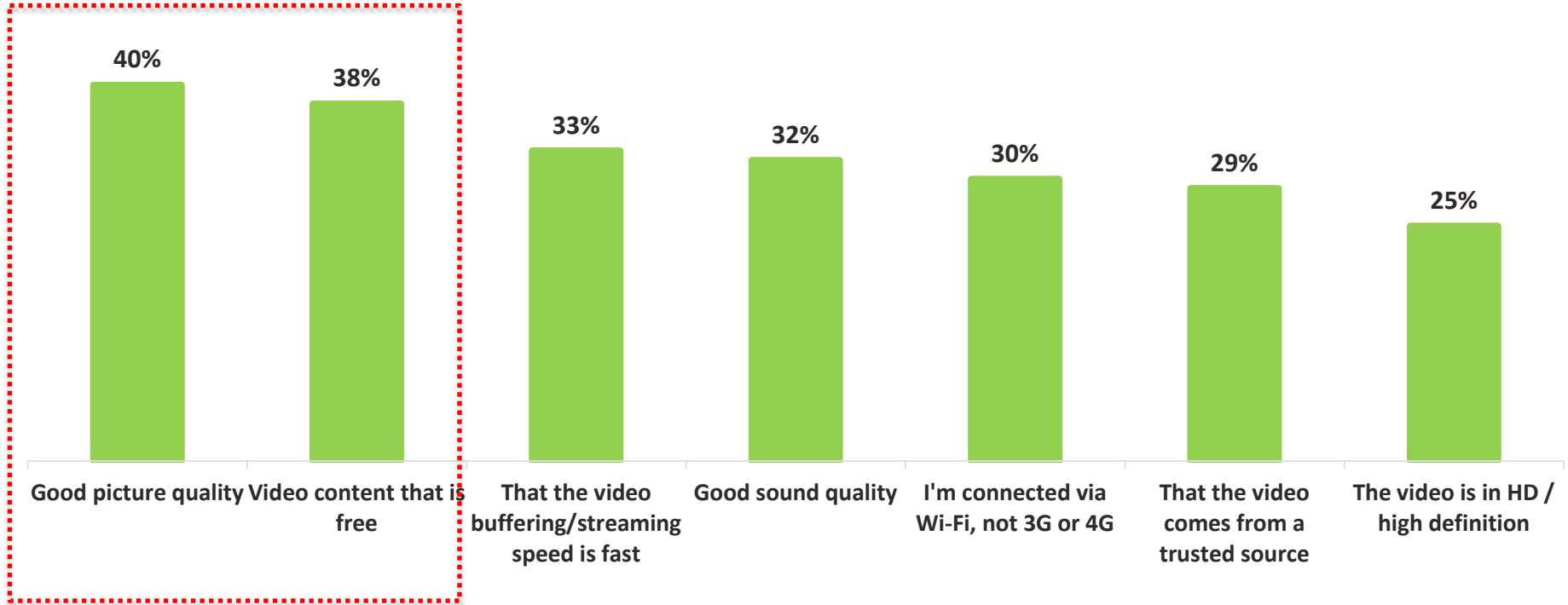
# **Mobile Video– Future proofing**



# Picture quality and free content are of key importance to smartphone video viewers.

- Followed by speed of buffering/streaming and sound quality.
- Connectivity type and trusted video sources are tertiary factors.
- HD video is important to one in four viewers.

Thinking about when you use your smartphone to watch mobile videos, which of the following are important to you? Please select all that apply



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200

These factors are important in both US & Canada and Europe.  
 Sound quality has more importance in US & Canada.

### Aggregated Response Important Factors

Attribute	%	Rank
Good picture quality	40%	1 <sup>st</sup>
Video content that is free	38%	2 <sup>nd</sup>
That the video buffering/streaming speed is fast	33%	3 <sup>rd</sup>
Good sound quality	32%	4 <sup>th</sup>
I'm connected via Wi-Fi, not 3G or 4G	30%	5 <sup>th</sup>
That the video comes from a trusted source	29%	6 <sup>th</sup>

### US And Canada Important Factors

Attribute	%	Rank
Good picture quality	51%	1 <sup>st</sup>
Video content that is free	51%	2 <sup>nd</sup>
Good sound quality	48%	3 <sup>rd</sup>
That the video buffering/streaming speed is fast	42%	4 <sup>th</sup>
I'm connected via Wi-Fi, not 3G or 4G	40%	5 <sup>th</sup>
That the video comes from a trusted source	34%	6 <sup>th</sup>

### Europe Important Factors

Attribute	%	Rank
Good picture quality	37%	1 <sup>st</sup>
Video content that is free	34%	2 <sup>nd</sup>
That the video buffering/streaming speed is fast	29%	3 <sup>rd</sup>
Good sound quality	29%	4 <sup>th</sup>
I'm connected via Wi-Fi, not 3G or 4G	26%	5 <sup>th</sup>
That the video comes from a trusted source	26%	6 <sup>th</sup>

Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200



↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.



In Latin America free content is less important, with speed and sound quality ranking more important in this region.

### Aggregated Response Important Factors

Attribute	%	Rank
Good picture quality	40%	1 <sup>st</sup>
Video content that is free	38%	2 <sup>nd</sup>
That the video buffering/streaming speed is fast	33%	3 <sup>rd</sup>
Good sound quality	32%	4 <sup>th</sup>
I'm connected via Wi-Fi, not 3G or 4G	30%	5 <sup>th</sup>
That the video comes from a trusted source	29%	6 <sup>th</sup>

### Latin America Important Factors

Attribute	%	Rank
Good picture quality	39%	1 <sup>st</sup>
That the video buffering/streaming speed is fast	37%	2 <sup>nd</sup>
Good sound quality	35%	3 <sup>rd</sup>
Video content that is free	34%	4 <sup>th</sup>
That the video comes from a trusted source	33%	5 <sup>th</sup>
I'm connected via Wi-Fi, not 3G or 4G	30%	6 <sup>th</sup>

### Australia And New Zealand Important Factors

Attribute	%	Rank
Good picture quality	46%	1 <sup>st</sup>
Video content that is free	44%	2 <sup>nd</sup>
That the video buffering/streaming speed is fast	40%	3 <sup>rd</sup>
Good sound quality	36%	4 <sup>th</sup>
I'm connected via Wi-Fi, not 3G or 4G	36%	5 <sup>th</sup>
That the video comes from a trusted source	29%	6 <sup>th</sup>

Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200



↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.

In Asia, free content is more important than picture quality. In South Africa sound quality out ranks free content.

### Aggregated Response Important Factors

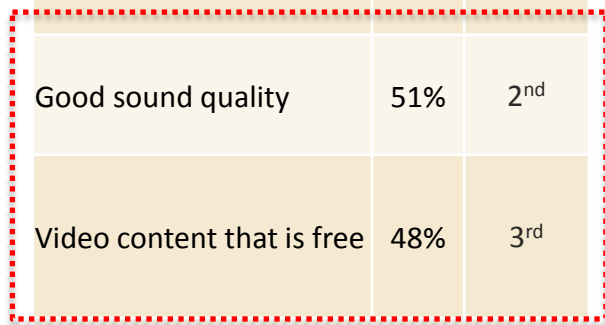
Attribute	%	Rank
Good picture quality	40%	1 <sup>st</sup>
Video content that is free	38%	2 <sup>nd</sup>
That the video buffering/streaming speed is fast	33%	3 <sup>rd</sup>
Good sound quality	32%	4 <sup>th</sup>
I'm connected via Wi-Fi, not 3G or 4G	30%	5 <sup>th</sup>
That the video comes from a trusted source	29%	6 <sup>th</sup>

### East Asia Important Factors

Attribute	%	Rank
Video content that is free	43%	1 <sup>st</sup>
Good picture quality	38%	2 <sup>nd</sup>
I'm connected via Wi-Fi, not 3G or 4G	35%	3 <sup>rd</sup>
That the video buffering/streaming speed is fast	32%	4 <sup>th</sup>
That the video comes from a trusted source	29%	5 <sup>th</sup>
Good sound quality	26%	6 <sup>th</sup>

### South Africa Important Factors

Attribute	%	Rank
Good picture quality	52%	1 <sup>st</sup>
Good sound quality	51%	2 <sup>nd</sup>
Video content that is free	48%	3 <sup>rd</sup>
That the video buffering/streaming speed is fast	47%	4 <sup>th</sup>
That the video comes from a trusted source	42%	5 <sup>th</sup>
I'm connected via Wi-Fi, not 3G or 4G	39%	6 <sup>th</sup>



Country: Total, Argentina Australia Austria Brazil Canada China Colombia Denmark Finland France Italy Japan Mexico New Zealand Portugal Russia Singapore South Africa

Spain Sweden Switzerland Turkey UK US

Date: May 2015

Base: Total respondents 4800, Per market: 200



↑ ↓ Significantly higher/lower. Tested at 95% confidence interval.



# On Device Research

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# About the IAB

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The Interactive Advertising Bureau (IAB) is comprised of more than 600 leading media and technology companies that are responsible for selling 86% of online advertising in the United States. On behalf of its members, the IAB is dedicated to the growth of the interactive advertising marketplace, of interactive share of total marketing spend, and of its members' share of total marketing spend. The IAB educates marketers, agencies, media companies and the wider business community about the value of interactive advertising. Working with its member companies, the IAB evaluates and recommends standards and practices and fields critical research on interactive advertising. Founded in 1996, the IAB is headquartered in New York City with a Public Policy office in Washington, D.C. For more information, please visit [iab.net](http://iab.net).

