



The U.S. Digital Video Benchmark

ADOBE DIGITAL INDEX | Q4 2013

Key takeaways

Online video viewing

- Smartphones overtook tablets for online video streaming in December 2012, and usage is up 86% year-over-year.
- The introduction of Xbox One and PS4 have streaming from gaming consoles on the rise, up 365% year-over-year.
- Sports video streaming is up 640% year-over-year.
- Over one fourth of video streams on large annual and bi-annual sporting events come from mobile devices.

Social referred video starts

- Facebook leads the way with social referred video starts.
- Half of visits referred from Facebook or Tumblr to sports related sites result in a video view.

TV Everywhere authenticated content

- The majority of TV Everywhere content is viewed on mobile devices, with tablets producing the most at 42%.
- 37% of TV Everywhere content streams are for sporting events.
- iPads, iPhones®, and iPods produce nearly 50% of play requests for TV Everywhere content.
- iPad and iPod users are watching the most TV Everywhere video, consuming over 10 videos per visitor per month, which is two times that of PC users.



Video growth led by mobile

Online video viewing continues to proliferate to mobile, gaming consoles, and apps. The explosion of TV Everywhere authenticated content, integration of video into social channels, and increase of mobile video viewing has created a unique opportunity to reach new viewers who can't be found on traditional TV channels. Understanding the metrics and trends behind this growth will help advertisers and publishers stay on the cutting edge of online video development and delivery.

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Mobile share

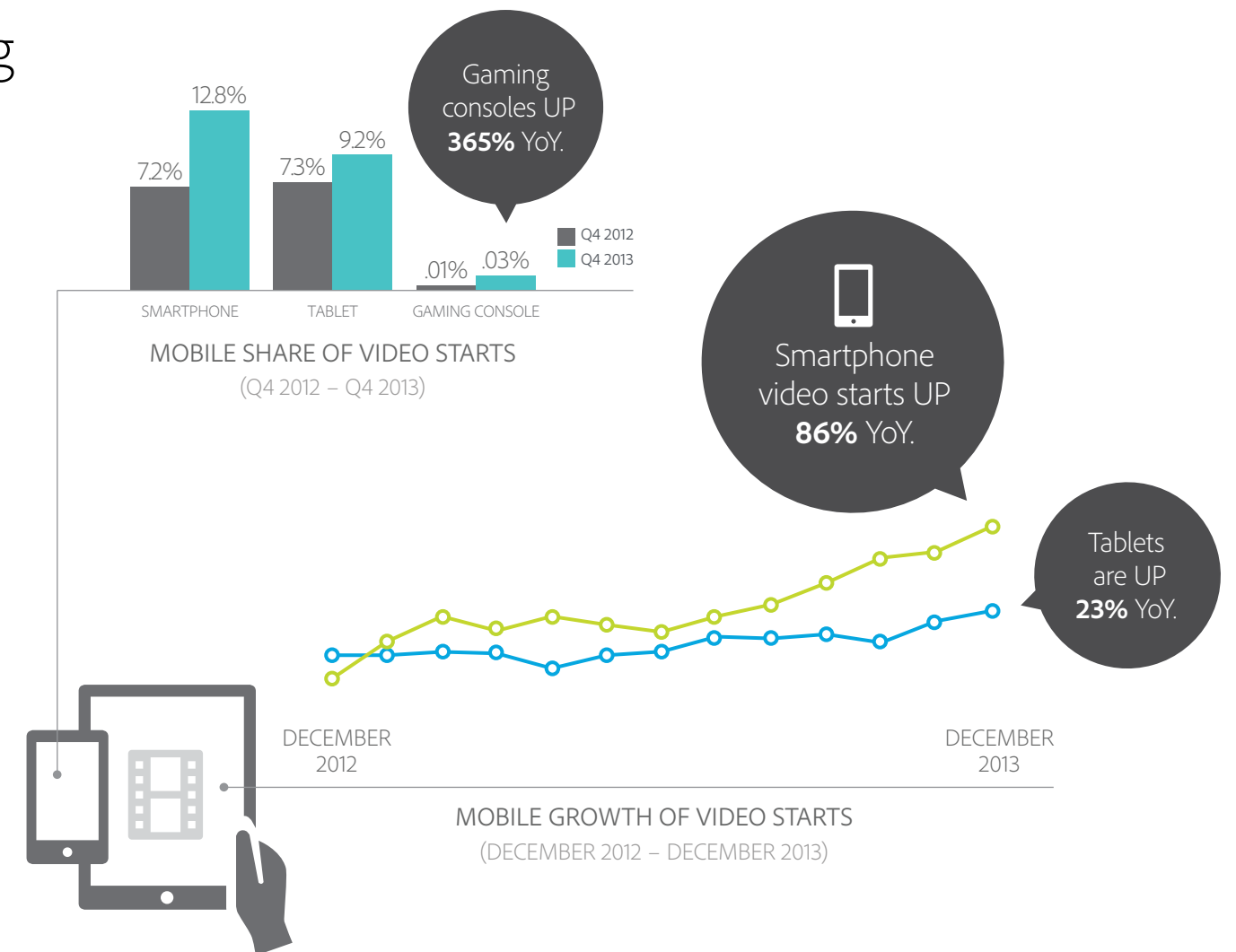
Mobile continues to gain share of video streaming, comprising over 20% in Q4 2013. Smartphones have become the device of choice for mobile video viewing, due in part to the trend of watching sporting highlights in snippets on small screens.

The findings:

- Smartphones overtook tablets in early Q1 2013 and are up 86% year-over-year.
- Tablets are growing slower than smartphones, but are still up 23% year-over-year.
- The introduction of Xbox One and PS4 have Gaming consoles on the rise up 365% year-over-year.

The opportunity:

With smartphones outpacing tablets for online video viewing, marketers need to ensure that video content is optimized for smartphones.



ONLINE VIDEO CONSUMPTION

Starts for sporting events

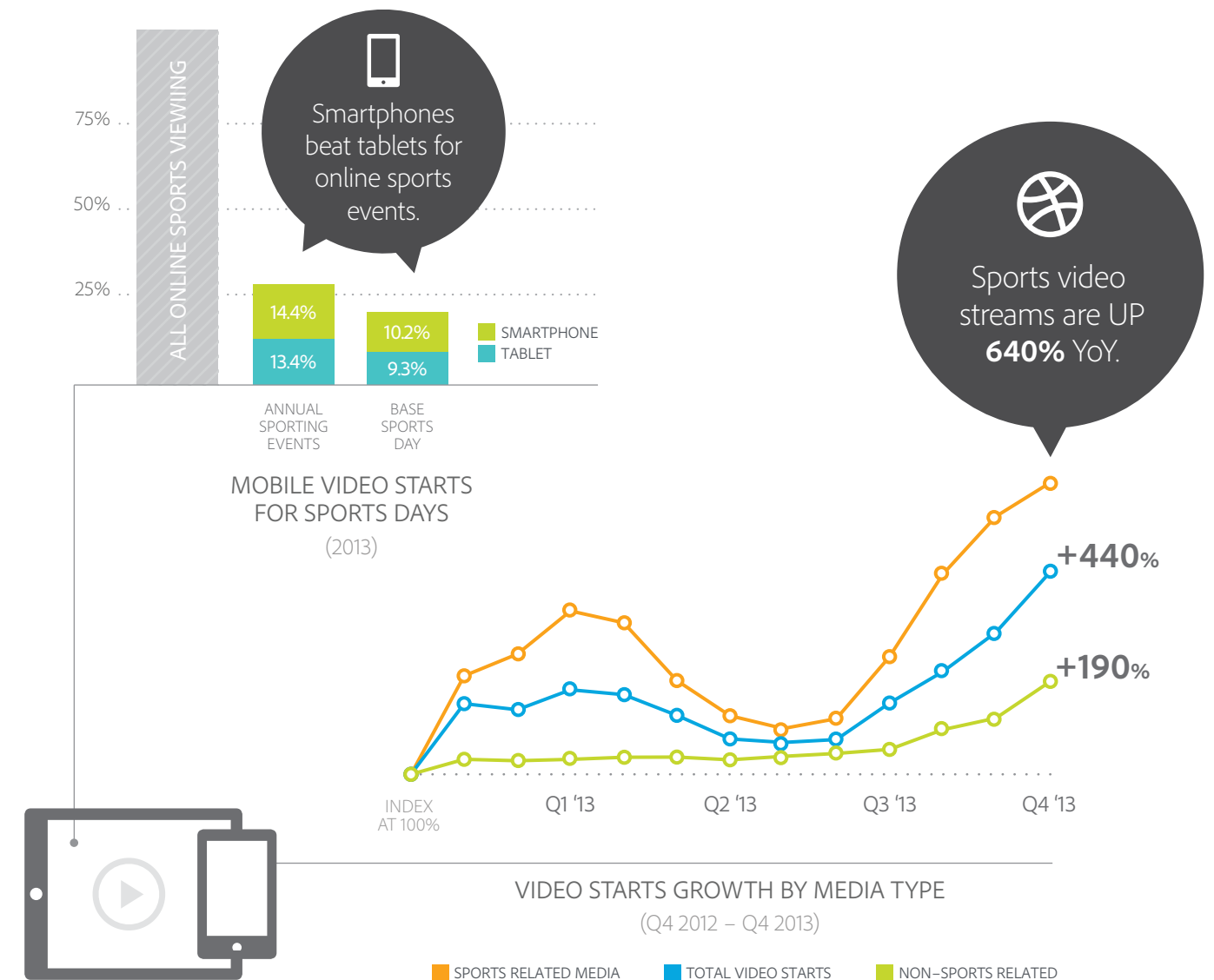
Video stream growth is being driven by sporting events in the winter and fall. Mobile viewing for annual sporting events, like playoffs and championship games, spikes for both smartphones and tablets during these seasons.

The findings:

- Sports video streams are up 640% year-over-year.
- Over 25% of online viewing on special sporting event days occurs on a mobile device, and mobile viewing is up 73% year-over-year.
- Smartphones are the device of choice for large annual or bi-annual sporting events.

The opportunity:

Mobile sports viewing provides great opportunities for advertisers to target audiences with branded content and ads that stand out.



Market share

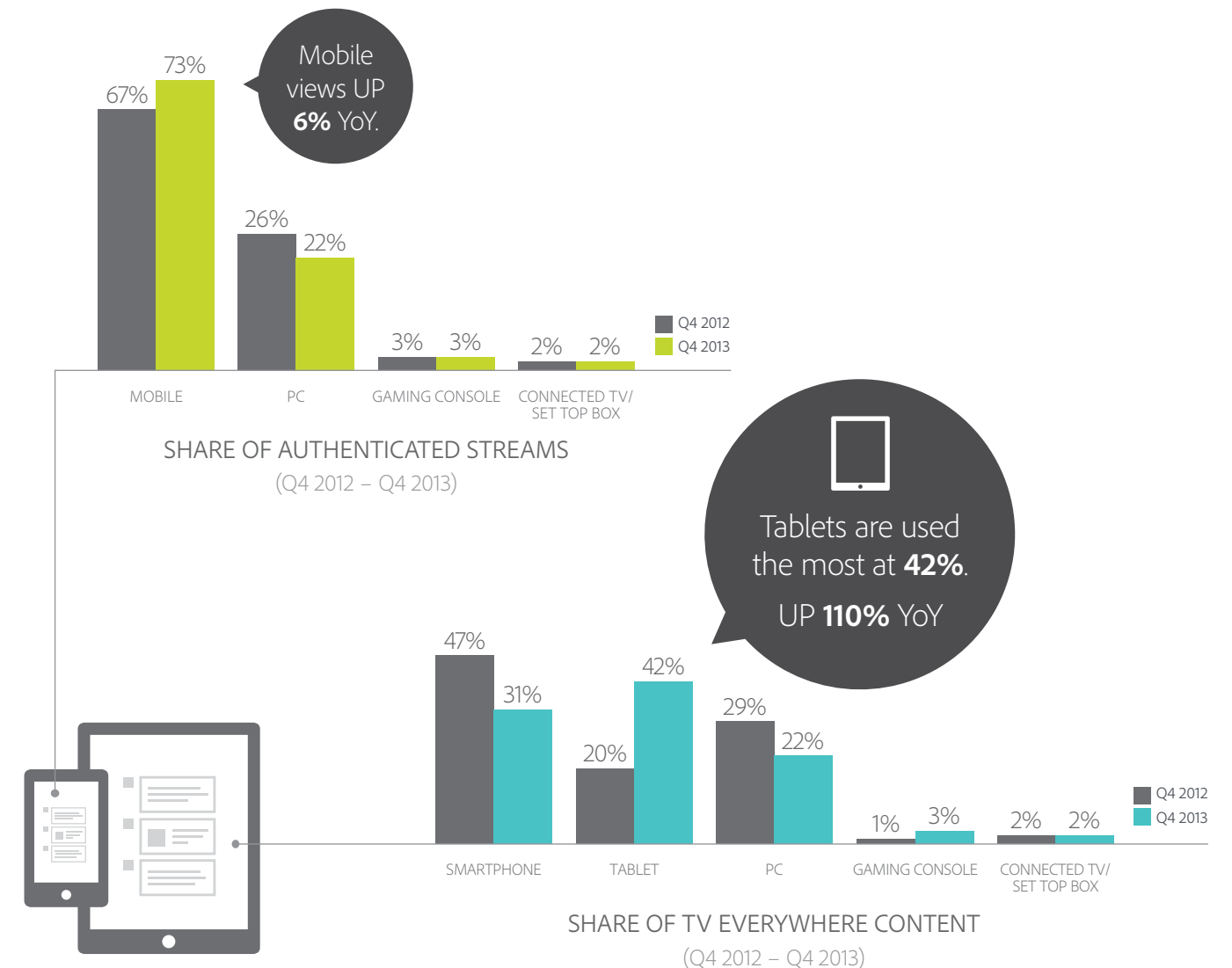
TV Everywhere content continues to grow at rapid rates. Adobe measured the streams and identified an increase from 222.5 million in 2012 to 574.2 million in 2013.

The findings:

- The majority of TV Everywhere streams are viewed on mobile devices, with tablets producing the most views at 42%.
- Tablet share has increased 110% year-over-year.
- The percent of TV Everywhere content viewed on mobile devices is up 9% year-over-year.

The opportunity:

The growth of TV Everywhere is an opportunity for advertisers and publishers to reach viewers with targeted ads that are more engaging than traditional TV content.



Content viewing

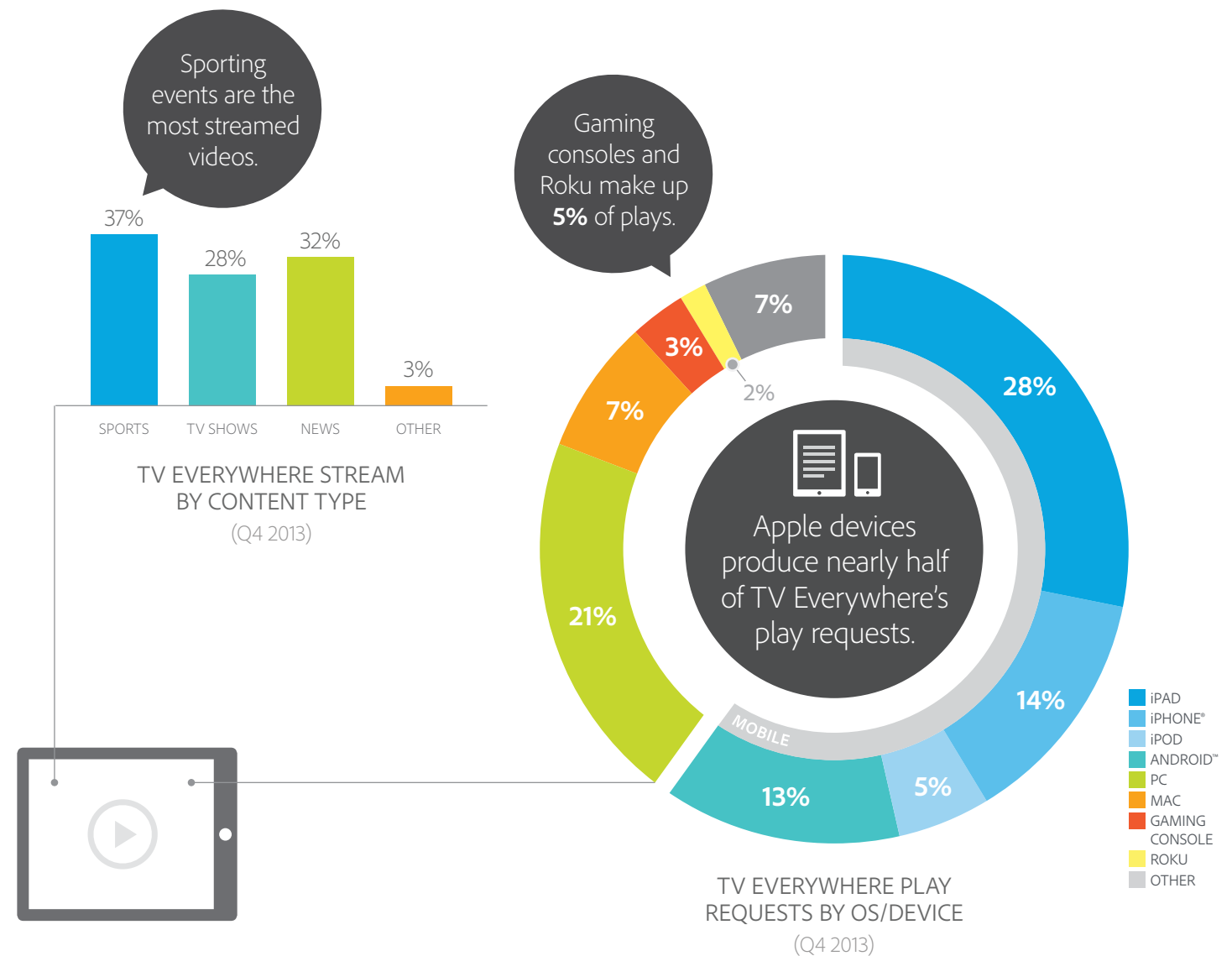
TV Everywhere audiences are tuning in primarily for sporting events—and the majority of them are watching from their Apple devices.

The findings:

- 37% of TV Everywhere streams are for sporting events.
- 28% of TV Everywhere streams are for TV shows.
- iPad, iPhone®, and iPod produce nearly 50% of play requests for TV Everywhere content.
- Roku and Gaming Consoles produce 5% of play requests.

The opportunity:

With over 50% of traffic coming from Apple devices and desktops, advertisers can target ads toward the more affluent crowd that uses these products.



Audience engagement

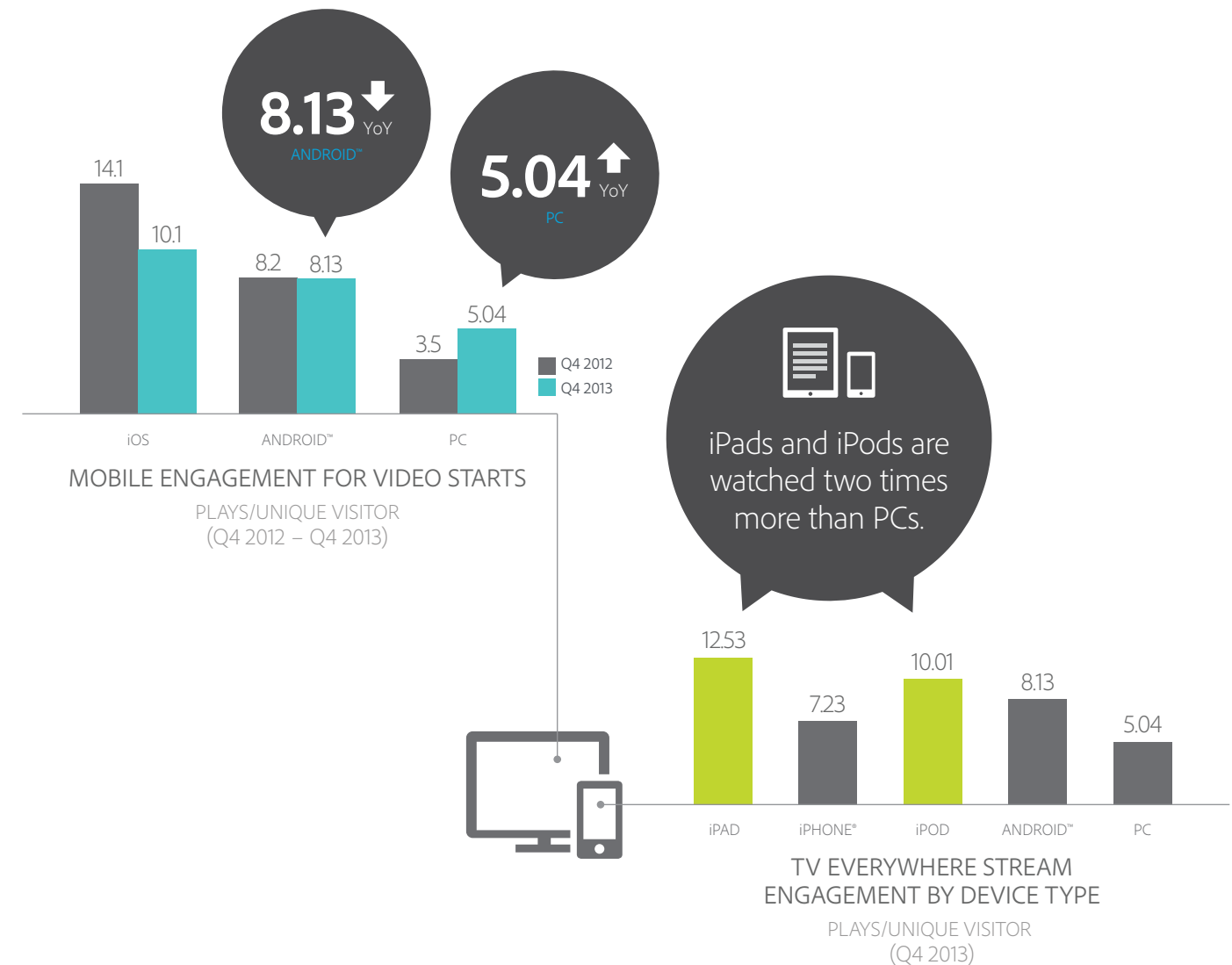
TV Everywhere audiences are watching streams on their iPads more than any other device. Surprisingly, iPods are a close second.

The findings:

- iPad and iPod® users are watching the most TV Everywhere video, consuming over 10 videos per visitor, per month, which is two times that of PC users.
- Engagement for iOS® and Android™ are down, while Flash is up year-over-year.

The opportunity:

Advertisers and publishers can look to provide more engaging ad packages to those on iPads and iPods, since they are viewing the most video clips per month.



SOCIAL-REFERRED VIEWING

Social media referrals

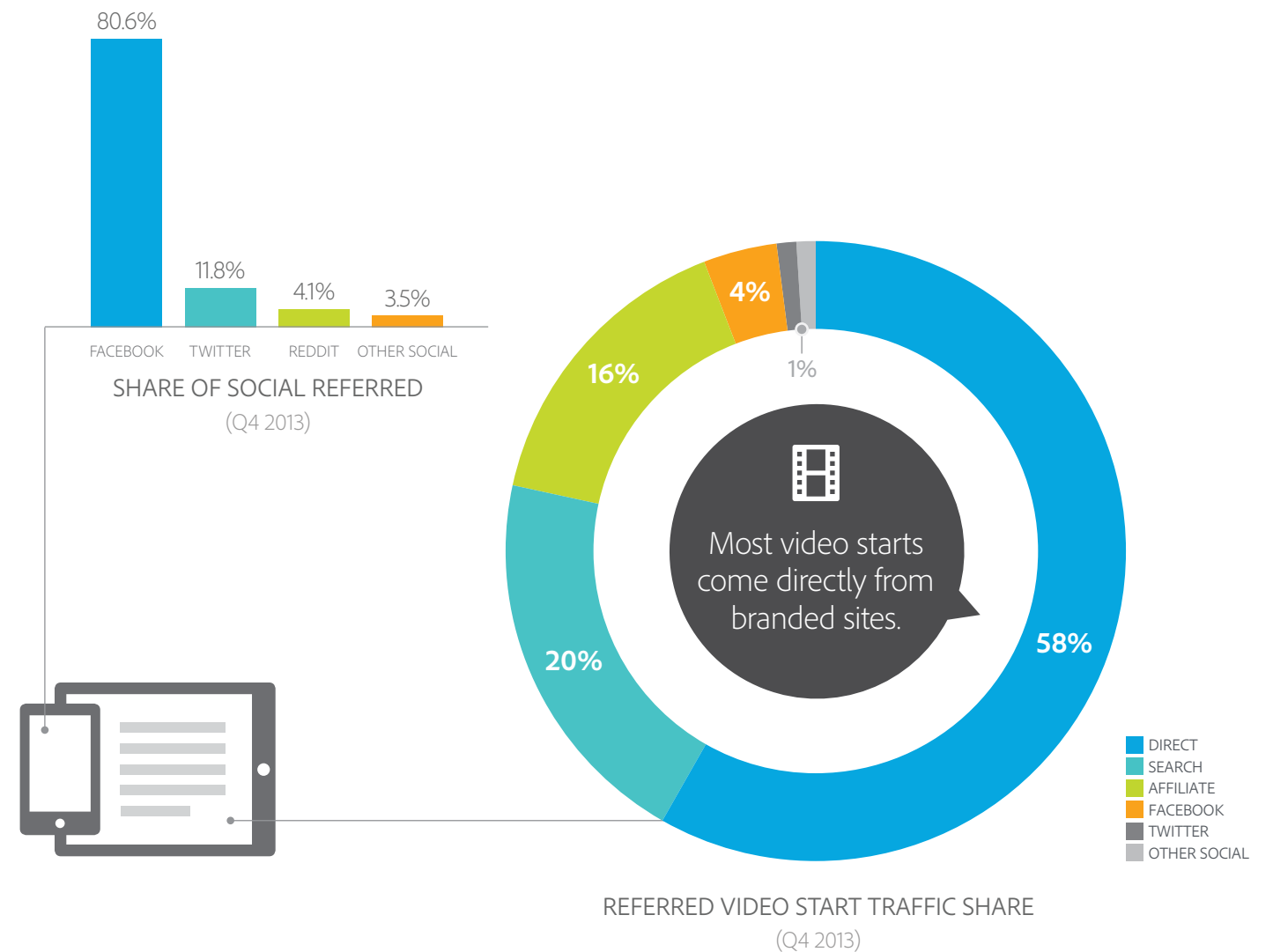
Social is referring more than 6% of video starts, with Facebook growing the fastest.

The findings:

- The majority of video starts come from direct traffic to a branded site.
- Facebook leads the way with social referred video starts.

The opportunity:

Media companies who promote videos on Facebook will likely see it continuing to grow as a viable outlet for engaging consumers.



SOCIAL-REFERRED VIEWING

View rates

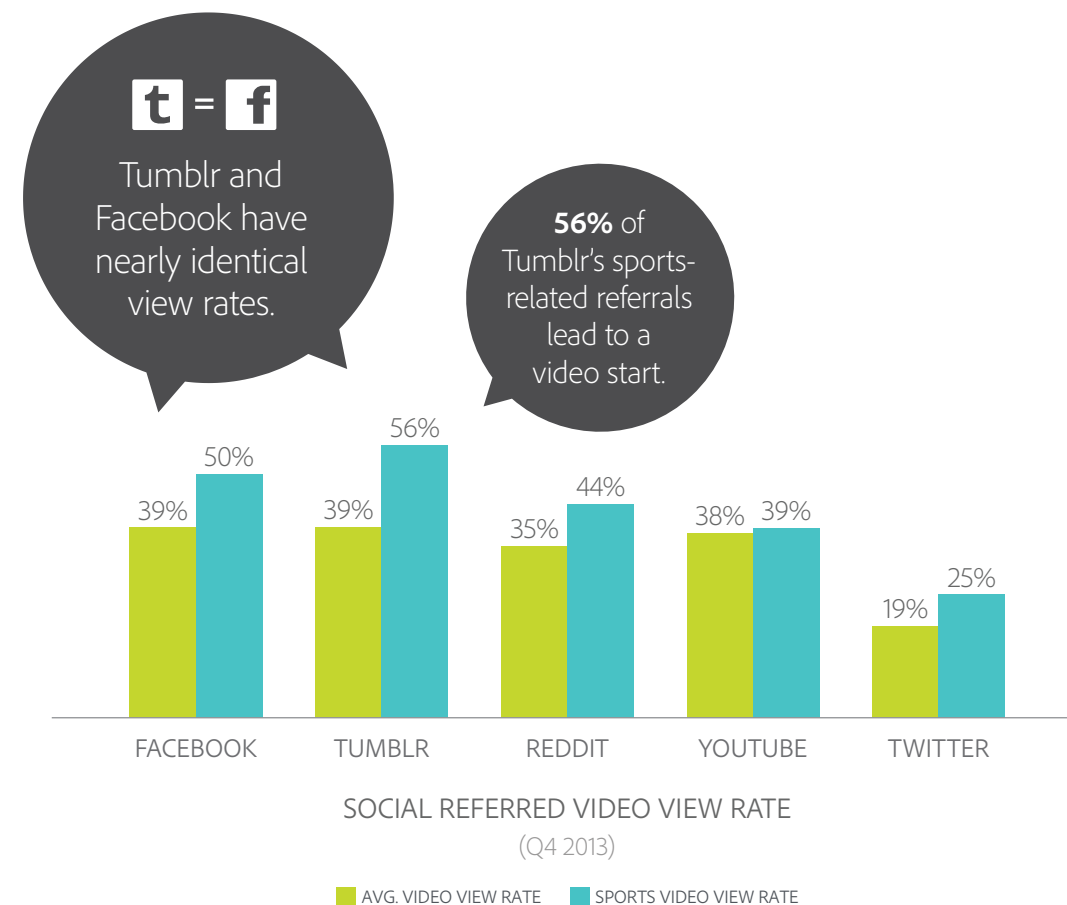
Facebook, Tumblr, and YouTube are producing the highest video view rates among social networks.

The findings:

- Tumblr and Facebook are producing nearly identical video view rates with over one third of referred visits producing a video start.
- Half of visits referred from Facebook or Tumblr to sports-related sites result in a video view.

The opportunity:

To improve overall consumer engagement, brands should continue to incorporate video into Facebook and other niche social sites like Tumblr.



Methodology

This report is based on consumer video viewing in 2012 and 2013. It is comprised of the aggregated and anonymous data from media and entertainment sites.

Sample information includes:

- 22.5 billion-plus online video starts
- 500 million-plus video starts from mobile devices
- 574 million-plus TV Everywhere video streams

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Appendix

% of Video Starts by Device													
	Dec 2012	Jan 2013	Feb 2013	Mar 2013	Apr 2013	May 2013	Jun 2013	Jul 2013	Aug 2013	Sept 2013	Oct 2013	Nov 2013	Dec 2013
Smartphone	7.0%	8.4%	9.6%	9.0%	9.5%	9.2%	8.8%	9.6%	10.1%	11.1%	12.3%	12.9%	13.1%
Tablet	7.8%	7.9%	8.0%	7.9%	7.4%	7.8%	8.0%	8.5%	8.6%	8.7%	8.5%	9.3%	9.6%
PC	84.6%	83.0%	81.8%	82.6%	82.6%	82.5%	82.4%	80.9%	80.5%	79.7%	78.8%	77.3%	76.7%

Mobile Share of Video Starts by Device		
	Q4 2012	Q4 2013
Smartphone	7%	12.8%
Tablet	7.8%	9.2%
Gaming Console	0.01%	0.03%

Video Starts Growth													
	Dec 2012	Jan 2013	Feb 2013	Mar 2013	Apr 2013	May 2013	Jun 2013	Jul 2013	Aug 2013	Sept 2013	Oct 2013	Nov 2013	Dec 2013
Total Video Starts	100%	244%	222%	271%	259%	218%	166%	151%	165%	246%	322%	410%	540%
Sports Related Media	100%	330%	350%	447%	420%	295%	201%	159%	188%	354%	568%	670%	739%
Non Sports Related	100%	114%	115%	118%	117%	120%	113%	120%	128%	140%	180%	210%	290%

Base Sports Day vs. Annual Sporting Events		
	Base Sports Day	Ann. Sporting Events
Smartphone	10.2%	14.4%
Tablet	9.3%	13.4%

% of TV Everywhere Streams	
	% of Play Requests
Sports	37%
TV Shows	28%
News	32%
Other	3%

Share of TV Everywhere Starts by Device		
	Q4 2012	Q4 2013
Tablet	20%	43%
Smartphone	47%	31%
PC	29%	22%
Gaming Console	1%	3%
TV/Set Top Box	2%	2%

Share of Social Referred Video Starts		
	Q4 2012	Q4 2013
Facebook	80%	81%
Twitter	11%	12%
Reddit	5%	4%
Other Social	4%	4%

Engagement (Plays/Unique Visitor) by Device (Q4 2013)	
	Q4 2013
iPad	12.53
iPhone	7.23
iPod	10.01
Android	8.13
PC	5.04

TV Everywhere Stream Play Requests by OS/Device	
	Q4 Play Requests
iPad	28%
PC	21%
iPhone	14%
Android	13%
Mac	7%
Other	7%
iPod	5%
Gaming Console	3%
Roku	2%

Referred Video Start Traffic Share	
	Q4 2013
Direct	58%
Search	20%
Affiliate	16%
Facebook	4%
Twitter	1%
Other Social	1%

Social Referred Video View Rate (Q4 2013)		
	Avg. Video View Rate	Sports Video View Rate
Facebook	39%	50%
Tumblr	39%	56%
Reddit	35%	44%
Blogspot	28%	25%
Twitter	19%	25%

Share of Authenticated Streams Growth		
	Q4 2012	Q4 2013
Mobile	71%	73%
PC	26%	22%
Game Console	3%	3%
TV/Set Top Box	2%	2%