



2009 is primetime for online video

Initial data from The Global Web Index shows that it's consumers, not traditional broadcasters who will shape the future of online video/broadcasting

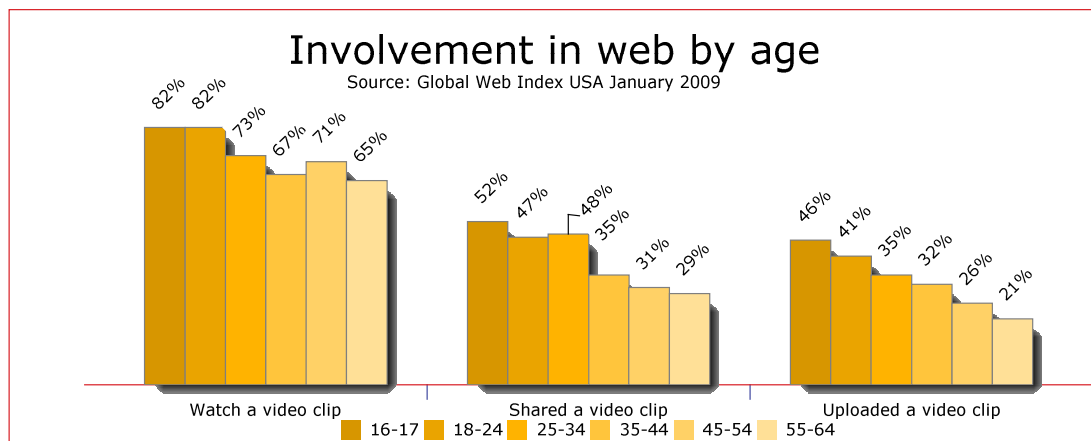
LONDON 28th May 2009: Trendstream, a specialist social media research consultancy, has launched a preview of The Global Web Index, a twice yearly survey powered by Lightspeed Research into web usage that quantifies global web trends and the impact of social media. Focusing on online video, the research shows that 2009 is primetime as video is transforming the web and the way in which consumers interact with video content. In fact it is having such a major impact that online video will ultimately affect the way the entire broadcasting industry evolves.

The online survey, conducted among 1000 active web users aged 16-65 in the United States earlier this year, shows that online video now rivals traditional broadcasting. Having gone from zero to mass market globally in just three years, online video is the fastest growing media platform in history. In one week in January 2009, 97 million Americans viewed a clip online, as many as are tuning into any major network. With 72% of US web users watching clips on the net, online video outstrips both blogging and social networking and is now the leading social media platform.

As well as rivalling traditional broadcasters for market share, online video is winning a new place in the hearts of active web users. Where traditional media is just a one way street in terms of user experience, web users are now embracing the two way nature of the online video experience. In January 2009, 39% of respondents shared a clip online and a further 31.5% contributed to the burgeoning mass of online media by uploading a clip themselves. Homemade content is by far the most popular content to upload

with 27% of those who uploaded a clip contributing material from this genre. Content from digital cameras is most likely to make it onto the net as 48% of contributors used this medium to create their content. At 26% and 22% respectively, home PCs and mobiles are the next most popular choices for creating content.

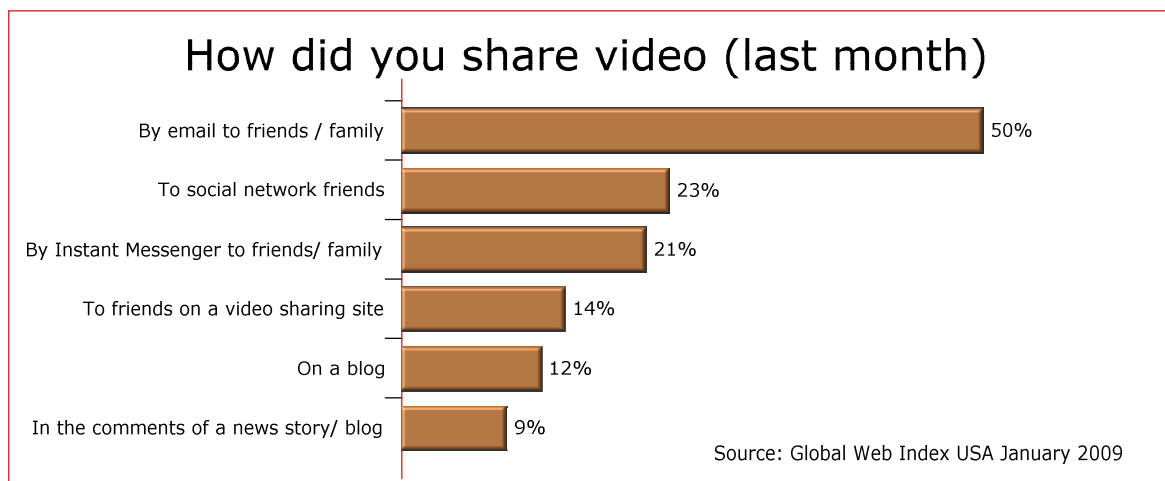
In contrast to some earlier predictions, Generation Y alone is not fuelling the growth. 82% of sixteen and seventeen year olds watched video online compared with 65% of those aged fifty five to sixty four. 52% of sixteen and seventeen year olds shared video clips online compared with 29% of fifty five to sixty four year olds, and a further 46% and 21% respectively uploaded a video. With users from across the age spectrum watching, creating and distributing video content online the so called “digital divide” is not as wide as might be expected. It is also clear that the online video audience is far more sophisticated and influential than was previously supposed with the heaviest viewers being in the 25 to 34 age bracket.



With 49 million active web users (32%) uploading content in January 2009, users of all ages now generate far more content than traditional broadcasters and collectively contribute the majority of video content to the web. Broadcasters who wish to engage with this highly influential and affluent group need to develop highly compelling, multi-platform content that can be accessed through multiple gateways including email, music sites, news sites, film sites, blogs and social networks.

While YouTube dominates as the main platform for viewing video online (68% of US video watchers accessed content in this way), other players fail to make an impact with the second biggest point for accessing video online being via email (35%). As such, user-generated and user-disseminated content dominates and it is clear that web users themselves will be the main determiners of the future of online video - both in terms of the type of content available and its distribution.

The survey also reveals that engagement levels vary significantly based on the origin of the content they are viewing. Web users have the highest attention span for clips that have been shared with them by a friend (rated 5.54 on a scale of 1 to 10 where 1 is low attention and 10 is high). At 3.64 videos of advertisements command the least attention from viewers. Although viral distribution dominates, the size of sharing networks vary greatly. The majority (72%) distribute content to fewer than three people. It is an active minority however of 11% who share with networks of at least six people who are the main driving force in the distribution of online video. Email is the preferred method of dissemination with nearly half (49.6%) using this method. Fewer than half that number (22.6%) shared video using a social network, the second most favoured distribution mechanism.



David Day, CEO Lightspeed Research Europe says, "This initial data from The Global Web Index, powered by Lightspeed Research, shows that the

dynamics of online video are changing fast. Active web users are driving this digital revolution and players at every step of the value chain need to take notice if they are to realise the opportunities that this explosion in online video consumption represents. This preview of US data from The Global Web Index presents an ideal opportunity for marketers to get to grips with the emerging trends of how consumers interact with online video and what brands need to do in order to engage viewers through this increasingly important medium.

“This research shows that in just three years we’ve reached a real watershed in the way that consumers expect to watch, contribute and share video content. Web users do not want just to watch video: they want to participate at every stage including the creation and sharing of material. The rapid rise of online video into the mainstream clearly poses a threat to the traditional broadcast model; now is the time for co-creation, user distribution and a true democratization of video content,” said Tom Smith, Managing Director of Trendstream. “We are really looking forward to receiving the first full wave of data in June to gain a truly global perspective on how social media is changing the rules for content providers and transforming the way in which web users engage with that content.”

Full results from the first wave of The Global Web Index, a survey of 16,000 consumers in the United Kingdom, France, Germany, Italy, Spain, the Netherlands, Russia, the United States, Canada, Mexico, Brazil, India, China, South Korea, Australia and Japan will be published in June and then updated bi-annually. It is anticipated that the research will become a definitive resource for those involved in digital communications who wish to engage with web users worldwide.

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