

CASE STUDY



THE EVOLUTION OF DIGITAL VIDEO VIEWERSHIP

INDUSTRY

As the viewership landscape continues to evolve, more and more adults are shifting their attention to digital video. As part of this trend, Americans are increasingly watching premium video on desktops, as well as through smartphones and tablets.

Advertisers and agencies are interested in understanding how the shifting viewing trends of premium video will influence brand impact and campaign effectiveness. In-depth viewership metrics, focused on digital video growth, are needed to develop highly effective strategies and maximize ROI.

CHALLENGE

Many advertisers are looking to understand the impact of shifting consumer behavior and what this means for their business. Google is at the forefront of this shift with its insight into viewing behavior on YouTube. However, to get a fuller view of video consumption patterns, Google partnered with Nielsen to analyze and understand the time audiences spend viewing content and the frequency of that viewership across all platforms—both digital and traditional.

STRATEGY

To gain a better understanding of the power of digital video, Google partnered with Nielsen to uncover deeper insights into year-over-year changes in the time viewers spend on TV, YouTube, and other digital properties as measured across devices, including televisions, desktops, smartphones and tablets.

In order to obtain a complete picture, Google was also interested in understanding the overlap of viewers on TV and other digital properties. To facilitate a richer analysis, Nielsen employed metered panels that revealed TV, smartphone, desktop, and tablet usage, as well as Nielsen National Total Media Fusion data, which models the overlap of these panels. In addition, Nielsen examined how time spent watching specific, officially distributed TV network program content on YouTube complements that same TV content. The analysis focused on the month of December, traditionally a heavy TV viewing month.

KEY TAKEAWAYS:

- Time spent watching video, including TV content, on YouTube is showing substantial growth year-over-year, revealing significant opportunities to reach audiences who prefer to view on the digital platform of their own choosing.
- Continuous measurement and analysis of the digital delivery of TV content provides advertisers and agencies critical insights needed to maximize brand engagement.

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RESULTS

Nielsen's Google-commissioned analysis revealed that:

- Between 2009 and 2014 time spent viewing video is up among adults as digital video is offsetting the decline in time spent watching TV.
- 18-49 year olds' time spent watching TV fell by almost 10 percent between December 2013 and December 2014, while the time they spent on YouTube shot up 44 percent, with mobile viewing making up the largest source of growth.
- YouTube overall, and even YouTube on mobile alone, reached more 18-34 and 18-49 year-olds in the US than any cable network in December 2014.
- YouTube also led all digital video platforms in December 2014 reaching more 18 to 34 and 18 to 49-year-olds than all TV network digital video properties (full episode players) combined and consistently reaching more adults 18 to 49-years-old than any other premium digital video platform*.
- YouTube accounted for 51 percent of time spent watching premium digital video* in December 2014 across desktop streaming, smartphones, and tablets among key adult demographics, specifically adults 18-34 and 18-49.

CONCLUSION

Advertisers and agencies are increasingly viewing digital video as an important opportunity to reach a growing audience and as a means to communicate their brand message. Nielsen's research shows that YouTube is the leader in digital video platforms, and time spent watching officially distributed TV content on YouTube is increasing year-over-year, which demonstrates that viewers haven't lost interest in the content, but instead are simply using different platforms to access it. Brands can take advantage of this and reach the audiences that are still watching the same video but are watching more on digital.

The trends revealed by these measurements and metrics offer advertisers the opportunity to optimize campaigns and ensure advertising budgets are maximized. Google has been able to validate YouTube's growing prowess as a digital video platform that can provide tremendous incremental reach for advertisers and agencies.

Data Sources: TV includes Live and DVR playback (NPM - Monthly TV Viewing, Live+DVR PB, All 4-Week Adjusted). Streaming Desktop Data—Nielsen Video Census (Home and Work), (including embedded video). Smartphone Platform Data—Nielsen Mobile Panel (EMM), P18+ (no embedded video). Tablet Data—Nielsen Electronic Mobile Measurement, P18+, iPad, Raw data projected to population using NPM. Estimates only. Digital Properties (Desktop, Smartphone, Tablet) crossed with TV (OOB)—Nielsen Media Impact (fusion).

*Premium Video Platforms for the purposes of this analysis are defined as Amazon, HBO, Hulu, all TV Full Episode Players and YouTube.



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