

# OTT Video Consumer Study 2015

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# 1. Executive Summary

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# Executive Summary

## OTT Video Usage

- More than half of consumers (54%) watched online videos. This is highest among millennials (aged 15 to 34) at 89%.
- The most used online video services were YouTube (96%) and social networks such as Facebook and Instagram (59%).
- Younger OTT viewers spent a greater proportion of their viewing time on online video compared to traditional TV (Children – 65%, Millennials – 61%, Adults aged 35 to 54 – 48%, Adults aged 55 to 65 – 43%).

## Viewing Preferences & Habits

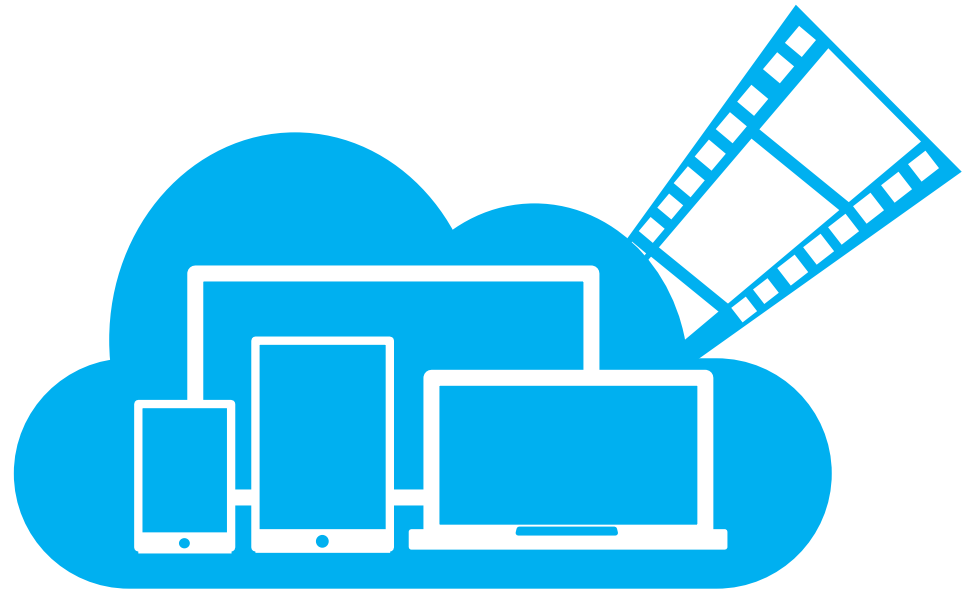
- The top genres of online videos were Drama (40%), Movies (25%), Sports (10%), and Entertainment & Variety (8%) for adults; and Animation & Cartoons (59%) for children.
- Online videos were most frequently consumed on mobile phones for adults (41%), while the most frequently used device varied for children according to their ages.
- Multitasking on a second screen was a more common behaviour in millennial OTT viewers (60%), and OTT viewers aged 11 to 14 (58%).
- Only 11% of adult OTT viewers were paying for online videos. Majority of those paying (67%), were doing so on top of their existing pay TV subscription and made no changes to their pay TV subscription.

## 2. Research Objectives & Methodology

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# Research Objectives

**The OTT Video Consumer Study** is the first edition of a study intended to track how online viewing habits evolve with increasing awareness and availability of over-the-top (OTT) video services in the Singapore market. The study provides insights on OTT video usage, video preferences and habits of Singapore viewers aged 0 to 65.



\*OTT refers to the delivery of content to local consumers via the Internet onto Internet-enabled devices such as smartphones, tablets and connected TVs. Traditional TV services in the study refer to free-to-air and pay TV channels.

# Methodology

A total of **2,585 Singaporeans and Permanent Residents aged 0 – 65**, representative of the Singapore population were interviewed in a face-to-face survey on OTT video consumption habits in **Oct – Nov 2015**.

<b>Adults, aged 15 – 65</b> <i>n = 1,785</i>		
<b>Age Group</b>	<b>Sample</b>	<b>%</b>
15 - 34	529	30%
35 - 54	919	51%
55 - 65	337	19%
<b>Total</b>	<b>1785</b>	<b>100%</b>

<b>Children*, aged 0 – 14</b> <i>n = 800</i>		
<b>Age Group</b>	<b>Sample</b>	<b>%</b>
0 – 6	260	33%
7 - 10	270	34%
11 - 14	270	34%
<b>Total</b>	<b>800</b>	<b>100%</b>

\* All children respondents were accompanied by their parents, some of whom answered on their children's behalf.

Note: Figures may not add up to 100% due to rounding.

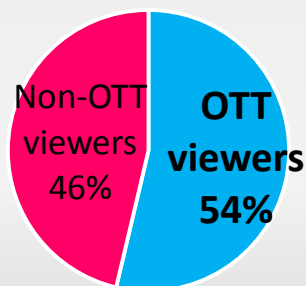
## 3. OTT Video Usage

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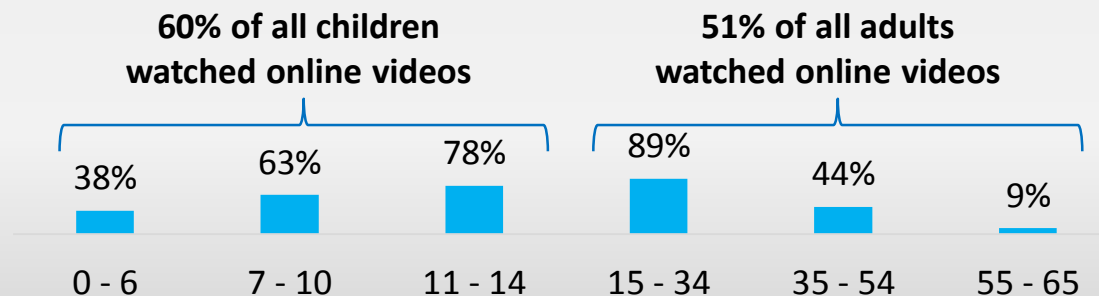
# More than half of consumers have used OTT video services, predominantly YouTube and social networks

Younger consumers were more likely to be OTT viewers compared to older consumers, with millennials (aged 15 – 34) being the most likely to have used OTT video services before.

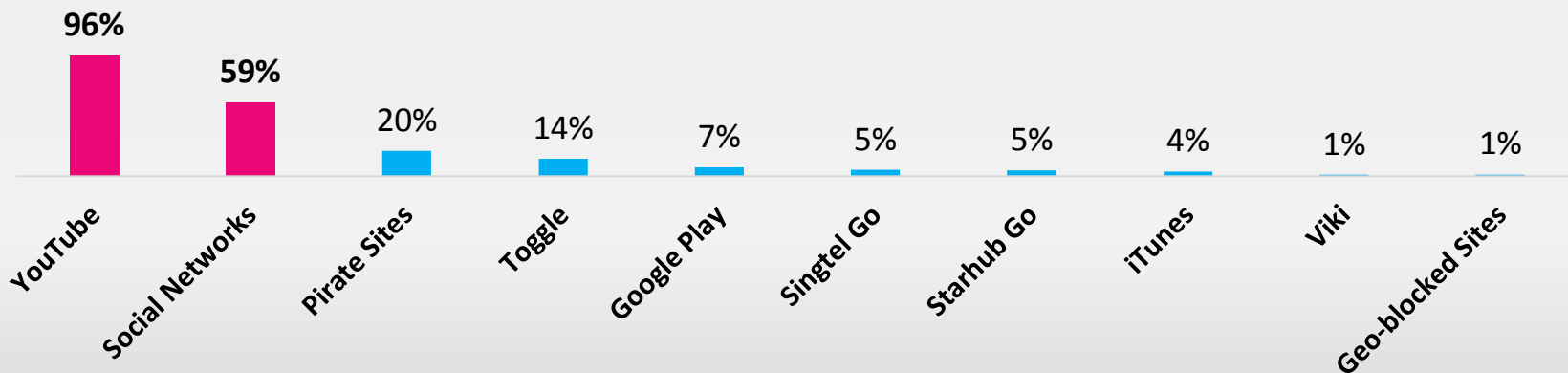


All Consumers

## Percentage of OTT viewers



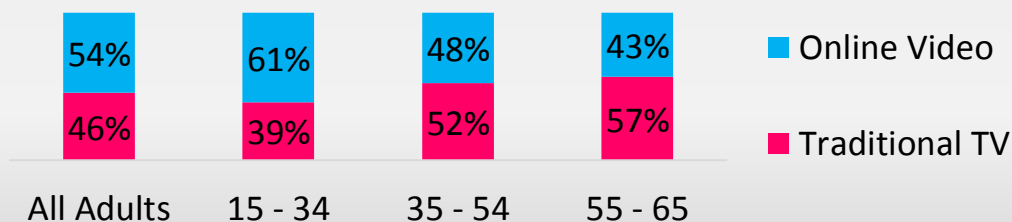
OTT video viewing was concentrated on YouTube and social networks.



# Millennials spent a greater proportion of their time on online videos than other adults

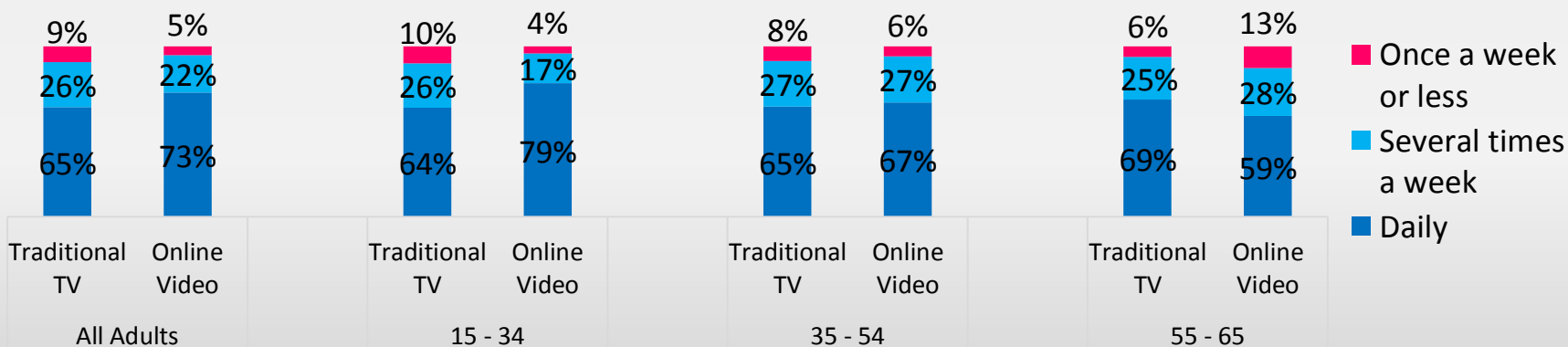
The proportion of time spent on online videos decreased with the age of adult OTT viewers.

Proportion of online viewers' weekly time spent on traditional TV and online video



Millennial OTT viewers were also more likely to consume online videos on a daily basis compared to traditional TV.

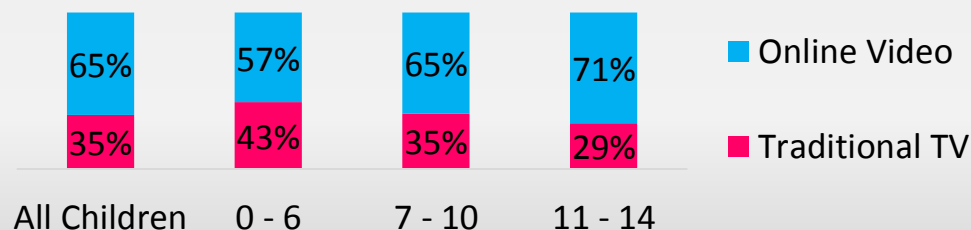
OTT viewers' frequency of consumption of traditional TV and online video



# Children spent a greater proportion of their viewing time on online video as they grew older

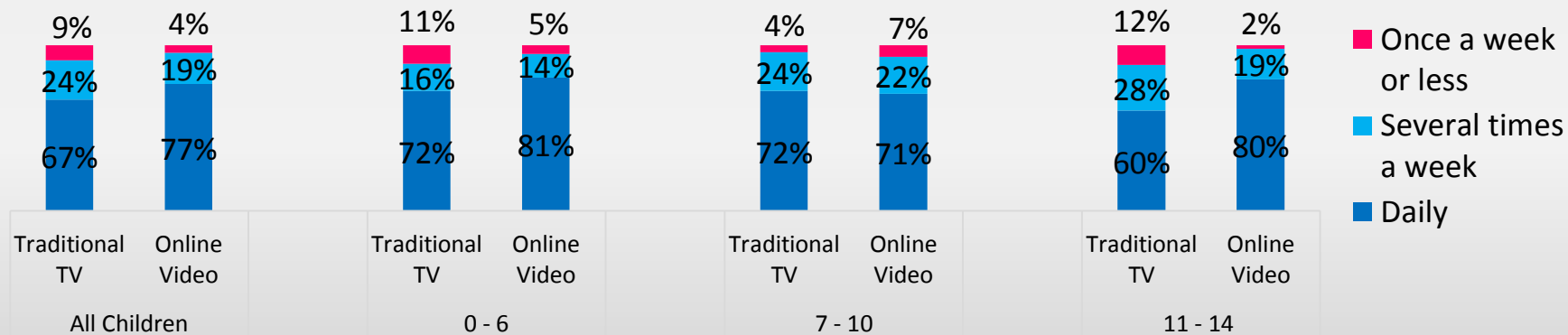
The proportion of time spent on online videos increased as children grew older.

### Proportion of online viewers' weekly time spent on traditional TV and online video



Children aged 0 to 6 and 11 to 14 were more likely to consume online videos on a daily basis compared to traditional TV.

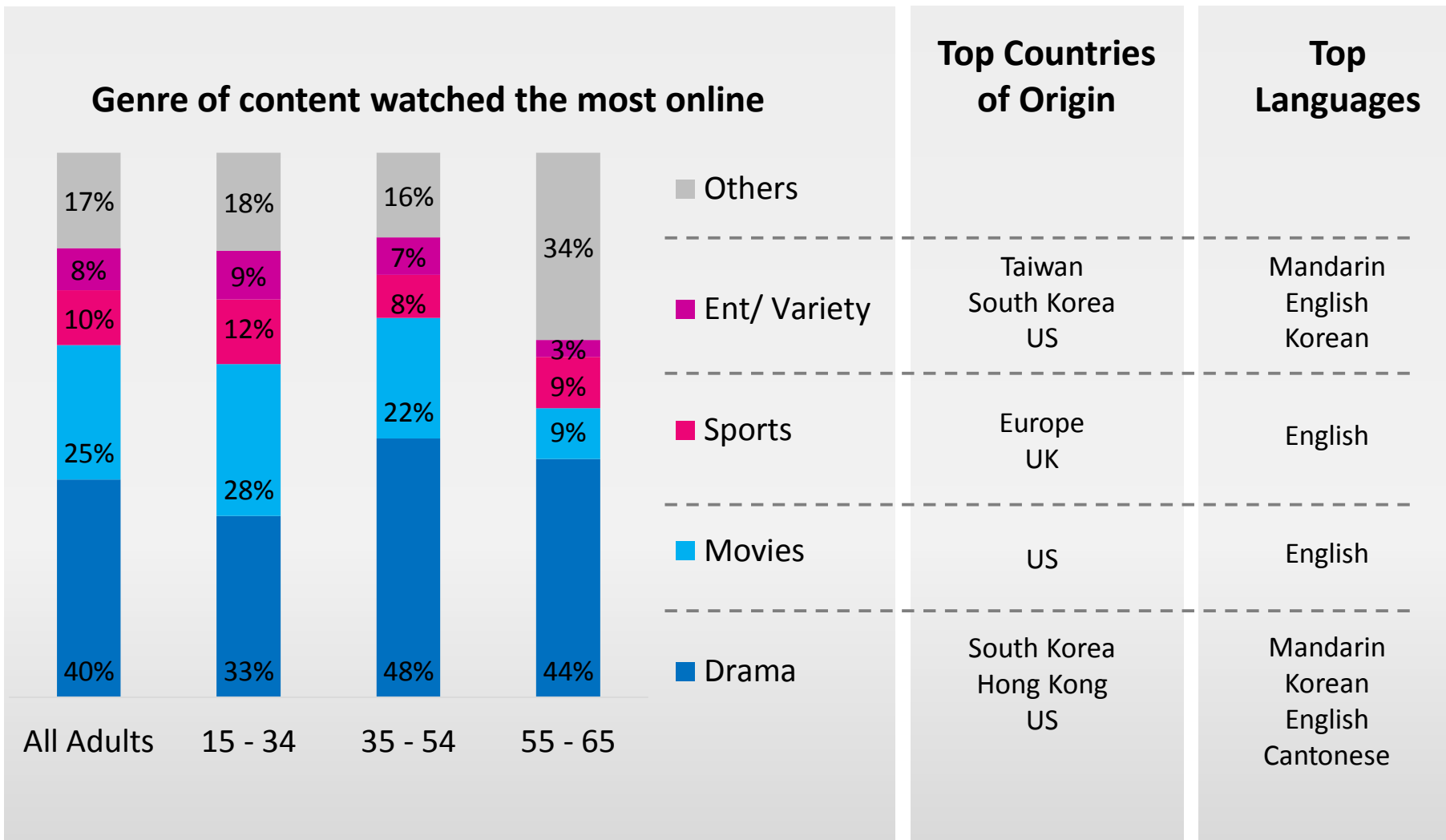
### OTT viewers' frequency of consumption of traditional TV and online video



## 4. Viewing Preferences & Habits

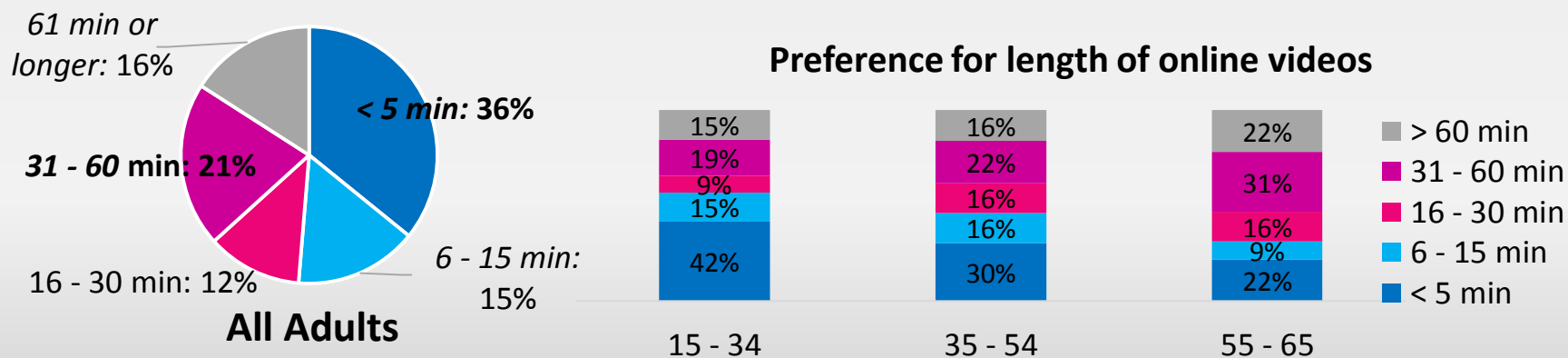
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# Adult OTT viewers chose Drama, Movies, Sports and Entertainment & Variety as their top genre for online viewing

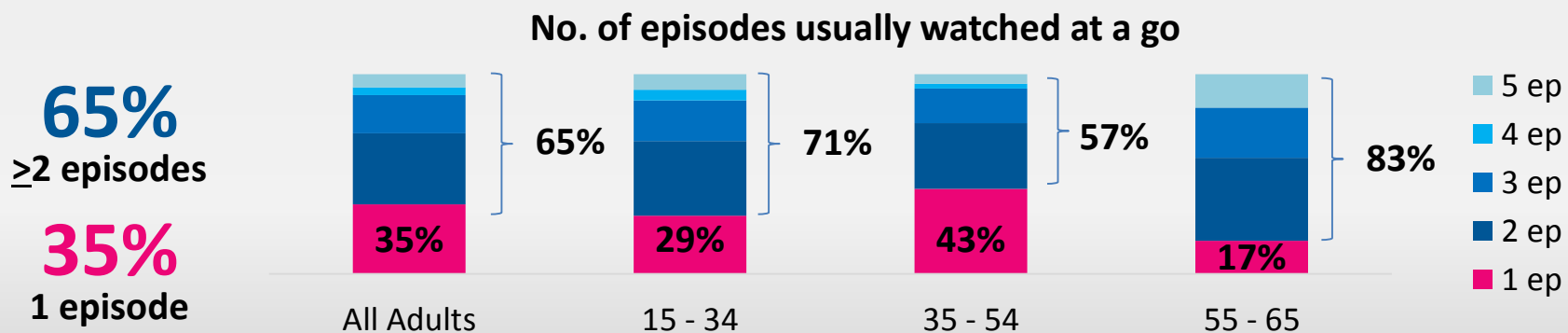


# Short form content dominated online viewing for adult OTT users; those who watched series consumed at least two episodes per sitting

While short form content of less than 5 minutes dominated online viewing, adult OTT viewers also watched content ranging from 31 – 60 minutes long.

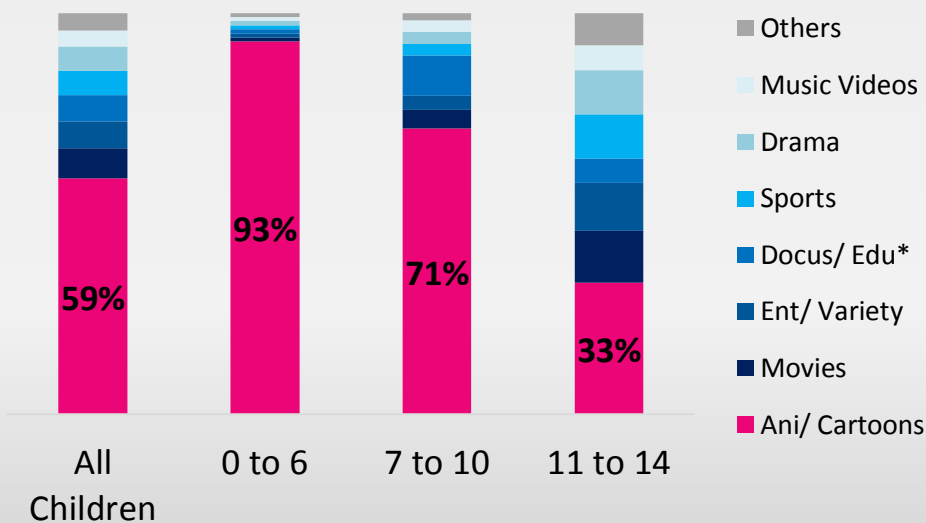


On average, consumers watched at least 2 episodes at a go when watching series online.



# Animation & cartoons and longer form content dominated children's viewing online

## Most watched genre online

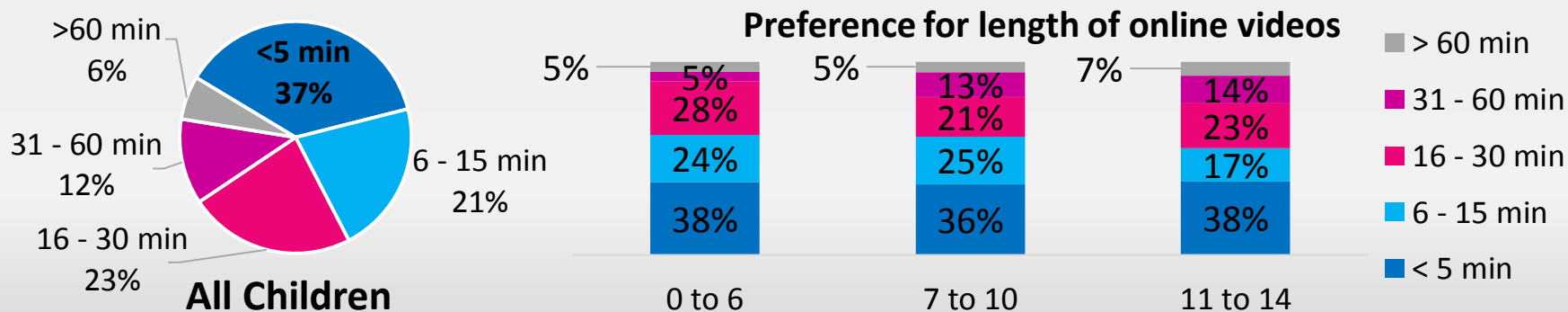


Animation & cartoons was the top genre for online viewing for children across all ages, although the range of genres became more varied as children grew older.

For children, US and Japan dominated as the country of origin for animation & cartoons while US dominated for most other content except sports online, where content from Europe and UK dominated.

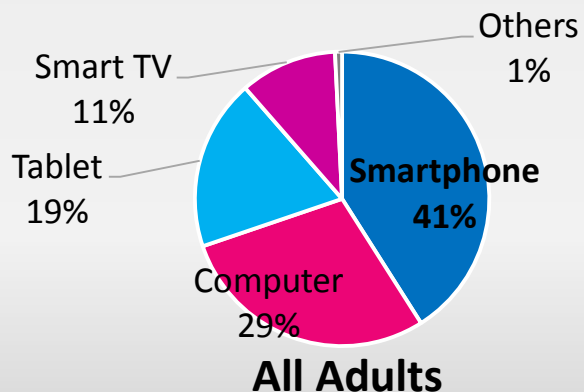
\*Documentaries/ Educational

Like adults, children preferred short form content of less than 5 minutes when viewing online videos.

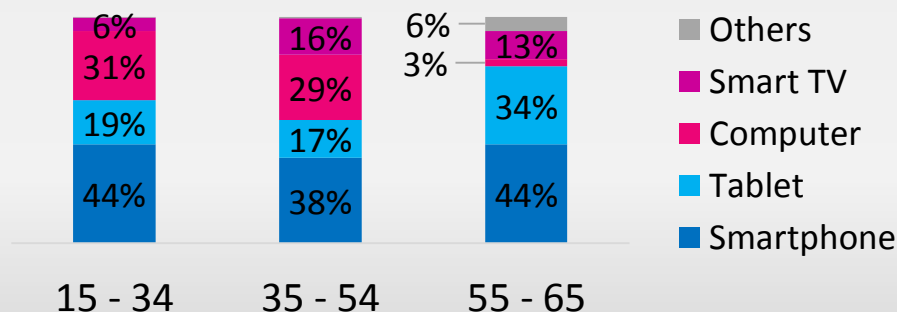


# The mobile phone was the preferred device to consume online videos for adults, while the most frequently used device varied for children according to their age

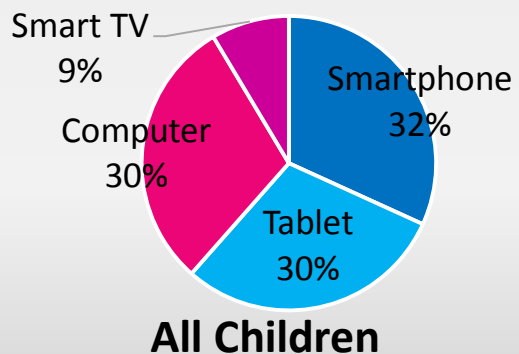
41% of all adults usually used their mobile phones to access online videos.



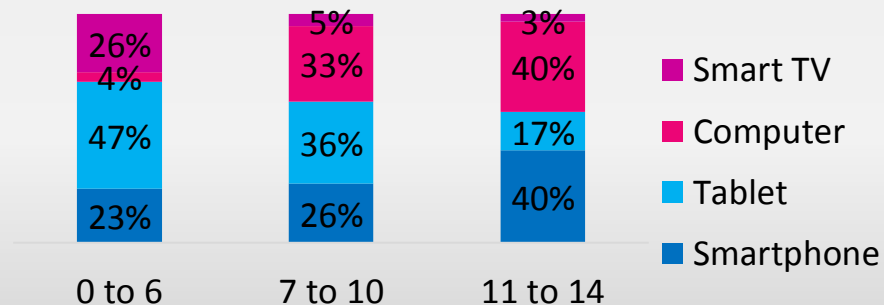
## Device online videos were mostly viewed on



Younger children aged 0 to 6 watched online videos the most through tablets, while children aged 11 to 14 watched videos on their computers or mobile phones.



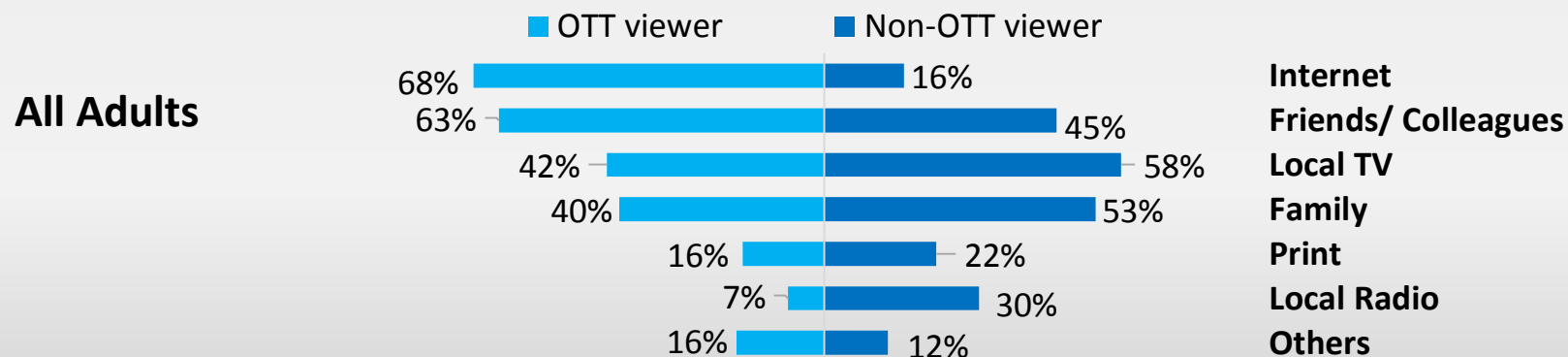
## Device online videos were mostly viewed on



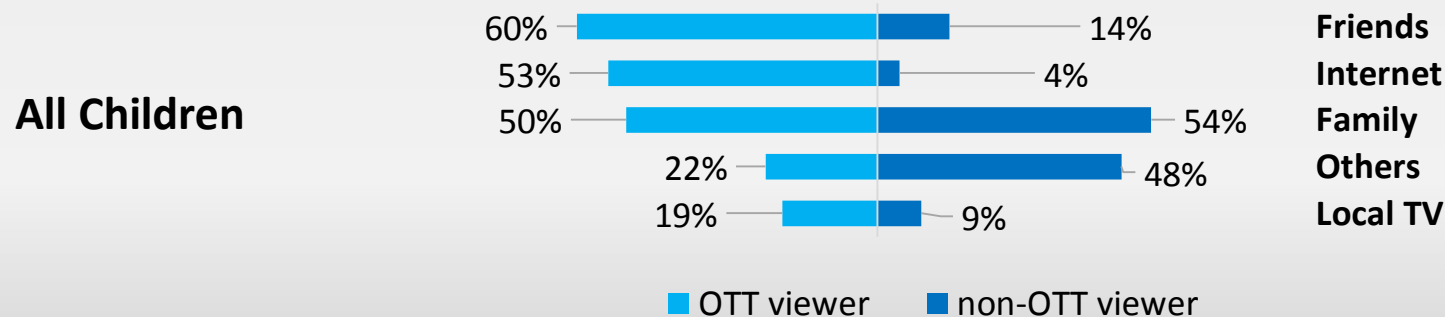


# Both adult and children OTT viewers discovered online videos mainly via the Internet and word-of-mouth

### Mode of discovering new online videos or traditional TV content

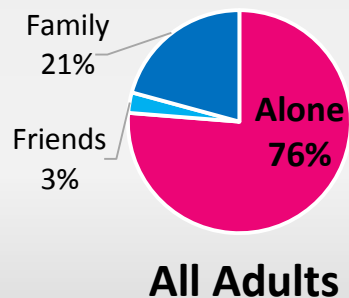


### Mode of discovering new online videos or traditional TV content

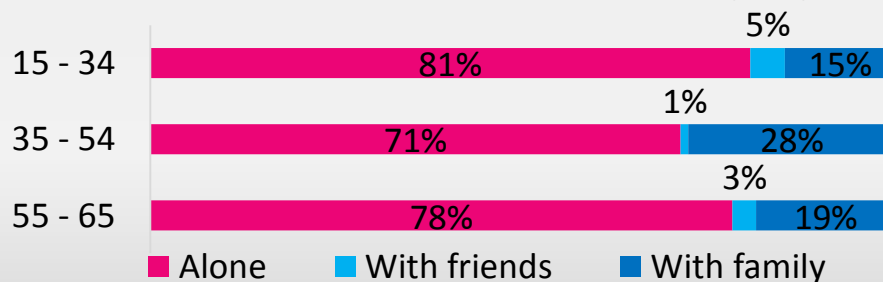


# Most OTT viewers consumed online videos alone

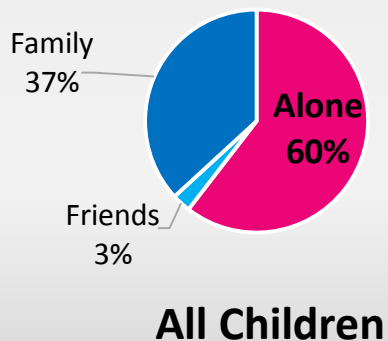
76% of adult OTT viewers generally watched online videos alone.



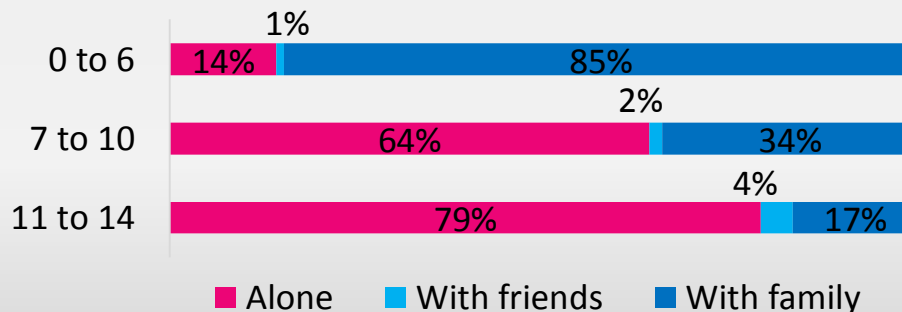
## Online videos consumed alone or with company



As with adults, older children were engaged in their online videos alone.



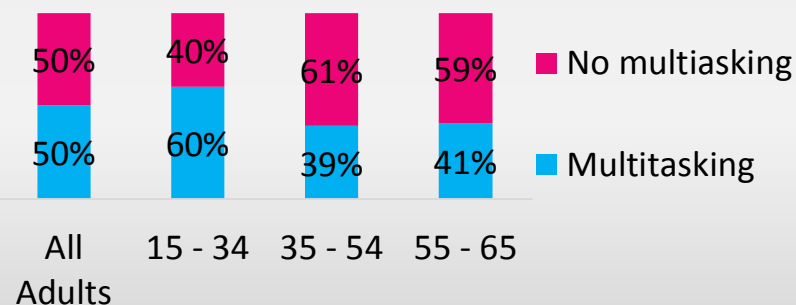
## Online videos consumed alone or with company



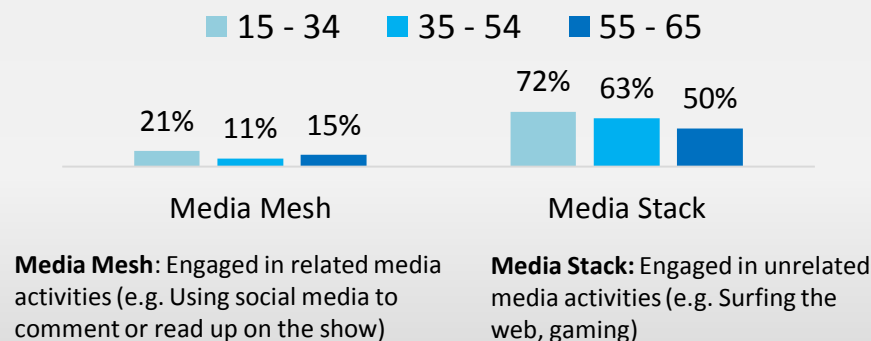
# Multitasking on a second screen was a more common behaviour in millennial OTT viewers, and viewers aged 11 to 14

Millennial OTT viewers were more likely to be multitasking on a second screen when watching online videos.

### Multitasking on a second screen while watching online videos

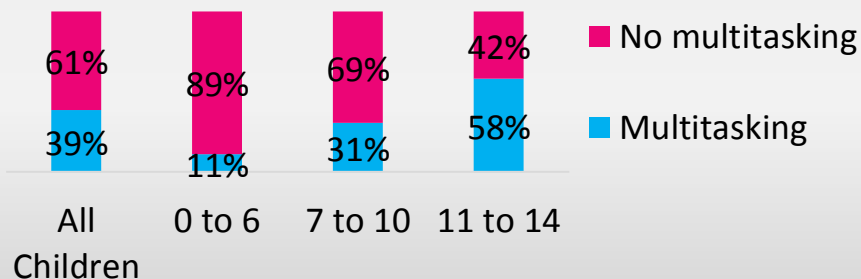


### Activities engaged in while on a second screen

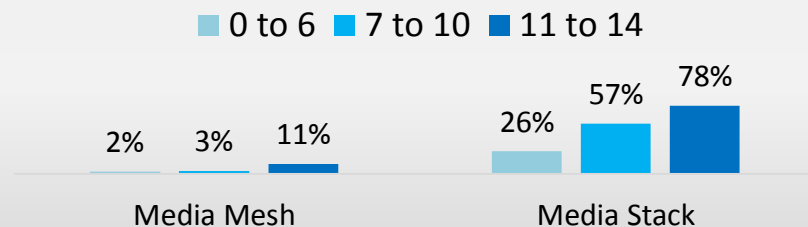


Children multitasked more on a second screen when watching online videos as they grew older.

### Multitasking on a second screen while watching online videos



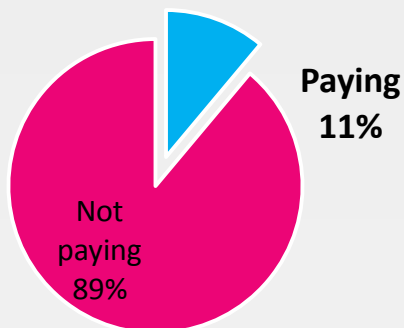
### Activities engaged in while on a second screen



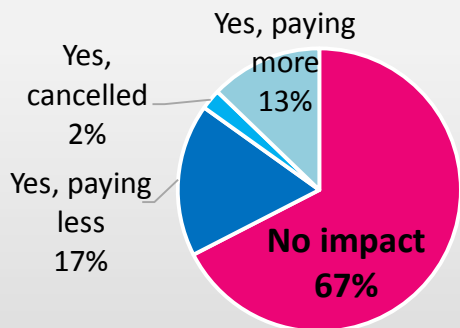
# Adult OTT viewers\* were unlikely to have and desire for a paid OTT subscription in the nascent Singapore OTT video market

## Adult OTT viewers who pay for online videos

Only a small percentage of OTT viewers were paying for their content.



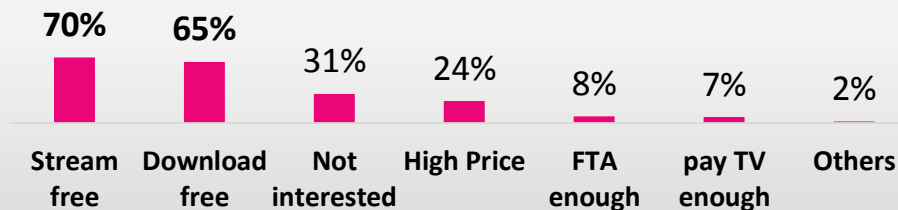
Out of those who were paying for OTT, OTT had little impact on their pay TV subscription.



**Impact on pay TV subscription**

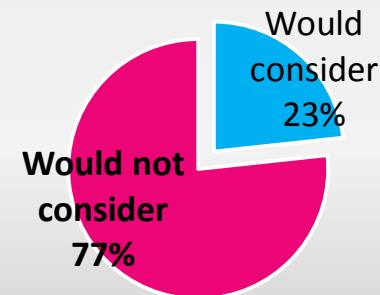
Of the 89% adult OTT viewers who were not paying for online videos, the biggest barrier to paying was competing free content, likely largely from legitimate sites. 20% of OTT viewers reported using pirate sites before.

## Barriers to paying for online video content






## Adult OTT viewers who would consider paying for online videos in the future

Majority of adult OTT viewers were not considering paying for online videos in the future.



\*Questions relating to current and anticipated spending on OTT video were only asked to the adults in the sample.

# Thank You

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