

# Online Video

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**57% of internet users have watched videos online and most of them share what they find with others.**

July 25, 2007

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# Summary of Findings

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## **Online video now reaches a mainstream audience; 57% of online adults have used the internet to watch or download video, and 19% do so on a typical day.**

The growing adoption of broadband combined with a dramatic push by content providers to promote online video has helped to pave the way for mainstream audiences to embrace online video viewing. The majority of adult internet users in the U.S. (57%) report watching or downloading some type of online video content and 19% do so on a typical day.

- Three-quarters of broadband users (74%) who enjoy high-speed connections at both home and work watch or download video online.
- Looking separately at those who have access to a high-speed connection at home, 66% report online video consumption, compared with 39% of home dial-up users.
- Yet, some online video viewers who have dial-up at home are able to supplement their access with broadband connections at work. Among those who are truly relegated to slow connections at home and work, just 31% say they have watched or downloaded video online.

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## **Three in four young adult internet users watch or download video online.**

Young adults (those ages 18-29) are among the most voracious video viewers. Three in four young adult internet users (76%) report online consumption of video, compared with 57% of online adults ages 30-49. Less than half (46%) of internet users ages 50-64 watch or download video and just 39% of those age 65 and older do so. On a typical day, young adults' video consumption also outpaces that of older users:

- Roughly one in three (31%) internet users ages 18-29 said they watched or downloaded some type of video on a typical day during the period of this survey.
- By comparison, 18% of internet users ages 30-49, 12% of those 50-64 and 10% of those 65 and older watch or download any type of video on the average day.

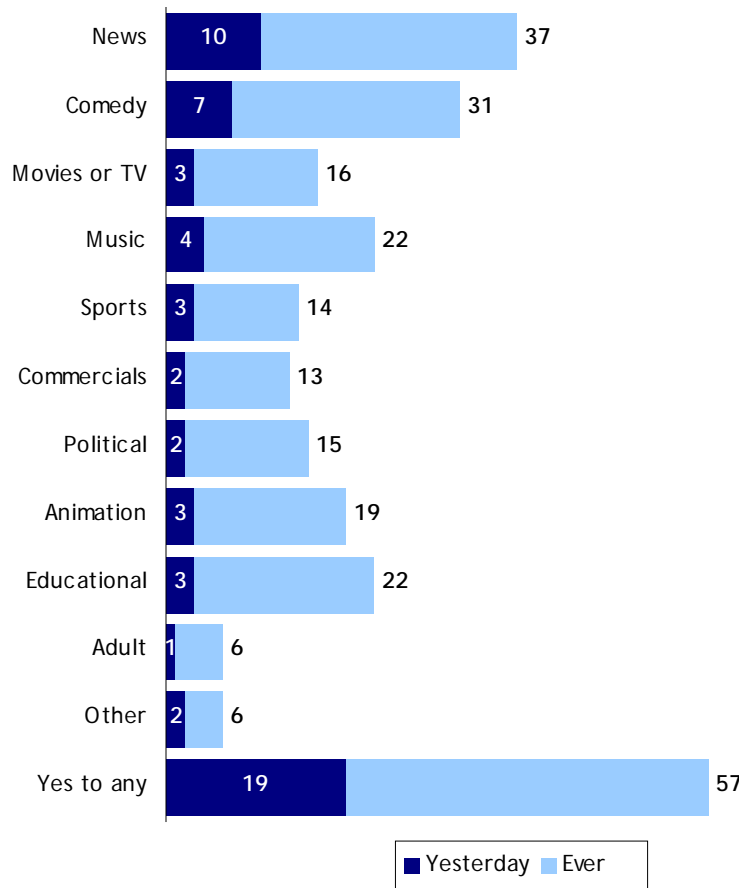
This report is based on the findings of a daily tracking survey on Americans' use of the internet. The results in this report are based on data from telephone interviews conducted by Princeton Survey Research Associates between February 15 to March 7, 2007, among a sample of 2,200 adults, 18 and older. For results based on the total sample, one can say with 95% confidence that the error attributable to sampling and other random effects is plus or minus 2 percentage points. For results based on internet users (n=1,492), the margin of sampling error is plus or minus 3 percentage points.

**News video is the most popular category for everyone except young adults.**

News outlets were among the first big investors in the online video realm and their early-mover advantage shows. News content captures the attention of users across all generations, and is the most popular genre with every age group except for those ages 18-29. Overall, 37% of adult internet users say they watch news videos, followed closely by comedy or humorous videos at 31%. For young adults, comedy is a bigger draw, with 56% watching humorous videos, compared with 43% of internet users ages 18-29 who say they watch news videos.

**Video: What they're watching**

percentage of adult internet users



Source: Pew Internet & American Life Project Tracking Survey, February 15 – March 7, 2007. Margin of error is ±3% for all adult internet users (n=1,492).

**More than half of online video viewers share links to the video they find with others.**

The desire to share a viewing experience with others has already been a powerful force in seeding the online video market. Fully 57% of online video viewers share links to the videos they find online with others. Young adults are the most “contagious carriers” in the viral spread of online video. Two in three (67%) video viewers ages 18-29 send others links to videos they find online, compared with just half of video viewers ages 30 and older.

Video viewers who actively exploit the participatory features of online video – such as rating content, posting feedback or uploading video – make up the motivated minority of the online video audience. Again, young adults are the most active participants in this realm.

<b>Online Video Gets Social: How users engage</b>						
<i>The percentage of video viewers who do the following activities...</i>						
	<i>Total</i>	<i>Men</i>	<i>Women</i>	<i>18-29</i>	<i>30-49</i>	<i>50-64</i>
Receive video links	75%	75%	75%	76%	77%	71%
Send video links to others	57	59	54	67	55	45
Watch video with others	57	58	57	73	58	34
Rate video	13	15	10	23	11	4
Post comments about video	13	15	10	25	9	5
Upload video	13	16	9	20	12	5
Post video links online	10	12	9	22	7	2
Pay for video	7	8	6	10	7	3

*Source: Pew Internet & American Life Project Tracking Survey, February 15 - March 7, 2007. Margin of error is ±4% for all online video viewers (n=800). Margins of error for subgroups range from ±5% for male video viewers to ±8% for viewers ages 50-64. Those ages 65 and older are not included in this table due to the small number of video viewers in this group (n=84).*

**Most online video viewers have watched with other people.**

Online video consumers are just as likely to have shared a video viewing experience in person as they are to have shared video online. The picture of the lone internet user, buried in his or her computer, does not ring true with most who view online video.

- 57% of online video viewers have watched with other people, such as friends or family.
- Young adults are the most social online video viewers; three out of four video consumers (73%) ages 18-29 say they have watched with others.

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### **Professional videos are preferred to amateur productions online, but amateur content appeals to coveted segments of the young male audience.**

Overall, 62% of online video viewers say that their favorite videos are those that are “professionally produced,” while 19% of online video viewers express a preference for content “produced by amateurs.” Another 11% say they enjoy both professionally-produced video and amateur online video equally.

For young adult men – one of the most coveted audiences for advertisers – there is a much narrower pro-am gap. Some 43% of online video users in this cohort express a clear preference for professional video, while 34% say they prefer amateur content. Another 19% of male video viewers ages 18-29 say they enjoy both amateur and professional content.

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### **Few pay to access online video.**

Providing free access to video content has been central to the popularity of YouTube and other online video portals. At the moment, few online video viewers are paying for any of the video they watch; just 7% say they have paid to access or download video online.

However, young adults, who are often thought to have little interest in paying for music and other digital media, are actually more likely than older video viewers to have paid for online video content. While 10% of online video viewers ages 18-29 have paid to access or download online video, just 3% of video viewers ages 50-64 have done so.

<b>Online Video: Summary of Findings at a Glance</b>
Online video now reaches a mainstream audience; 57% of online adults have used the internet to watch or download video, and 19% do so on a typical day.
Three in four young adult internet users watch or download video online.
News video is the most popular category for everyone except young adults.
More than half of online video viewers share links to the video they find with others.
Most online video viewers have watched with other people.
Professional videos are preferred to amateur productions online, but amateur content appeals to coveted segments of the young male audience.
Few pay to access online video.
Source: Madden, Mary. <i>Online Video</i> . Washington, DC: Pew Internet & American Life Project, July 25, 2007.

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# Acknowledgements

**About the Pew Internet & American Life Project:** The Pew Internet Project is a nonprofit, non-partisan “fact tank” that explores the impact of the Internet on children, families, communities, the work place, schools, health care, and civic/political life. The Project aims to be an authoritative source for timely information on the Internet's growth and societal impact. Support for the project is provided by The Pew Charitable Trusts. For more information, please visit us at: [www.pewinternet.org](http://www.pewinternet.org).

**About Princeton Survey Research Associates International:** PSRAI conducted the survey that is covered in this report. It is an independent research company specializing in social and policy work. For more information, please see: <http://www.psrai.com/>.

# Part 1.

## The Audience for Online Video

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### Experts have long anticipated the mainstreaming of online video.

*“The really interesting highway applications will grow out of the participation of tens or hundreds or millions of people, who will not just consume entertainment and other information, but will create it, too. Until millions of people are communicating with one another, exploring subjects of common interest and making all sorts of multimedia contributions, including high-quality video, there won’t be an information highway.”*

- Bill Gates (1995, *Plugged In At Home*)<sup>1</sup>

*“By the year 2005, Americans will spend more time on the Internet than watching network television and videocassette rentals will have been replaced by easily available video-on-demand services.”*

- Nicholas Negroponte (1995, *The Future of News*)<sup>2</sup>

While in 2007 we’re still far from Negroponte’s vision of an internet-dominated world where Americans spend more time online than they do watching traditional broadcast and cable television, we are very clearly speeding towards that vision -- right along the interactive highway of user-generated content that Bill Gates described in 1995. What once might have seemed like pie-in-the-sky proclamations about the delivery of online video are now clear realities as the growing adoption of broadband, coupled with user-friendly video sharing applications that offer deep catalogs of compelling content draw more viewers every day.

Online video has been a central feature in a growing discussion about the impact of user-driven “Web 2.0” technologies. YouTube and other video sharing sites are often held up as powerful examples of both the social and monetary value of applications built around user contributions. And as users have realized the unlocked potential of online video, a new channel of interactive mass communication has started to emerge in daily life.

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<sup>1</sup> This quote is also catalogued as part of the “Imagining the Internet” predictions database. Available at: <http://www.elon.edu/predictions/default.aspx>

<sup>2</sup> Ibid.



**57% of the online public has used the internet to watch or download video.**

Who Watches Online Video	
<i>The percentage of internet users in each group who watch or download online video.</i>	
Total	57%
Men	63
Women	51
Ages 18-29	76
Ages 30-49	57
Ages 50-64	46
Age 65+	39
HS Grad or less	46
Some college	62
College Grad	64
Less than \$30K	52
\$30K-\$50K	63
\$50K-\$75K	63
\$75K+	62

Source: Pew Internet & American Life Project Tracking Survey, February 15 – March 7, 2007. Margin of error is ±3% for all adult internet users (n=1,492). Margins of error for subgroups range from ±4% for women (n=788) to ±8% for those age 65 and older (n=202).

Overall, 57% of adult internet users say they watch or download video content online. On a typical day, 19% report watching or downloading some type of online video content. Other estimates, which include the *passive* viewing of online video, such as “in-banner” advertising embedded in many popular websites, suggest the online video viewing audience may be even larger.<sup>3</sup> However, for the purposes of our survey, we were primarily interested in interviewing those who *actively* seek out and watch online video.

In keeping with other media consumption trends, a familiar refrain rings loud and clear: It’s a broadband thing.

Three-quarters of broadband users (74%) who enjoy high-speed connections at both home and work watch or download video online. Looking separately at those who have access to a high-speed connection at home, 66% report online video consumption, compared with just 39% of home dial-up users who watch or download video. Among those home dial-up users who watch video, nearly half of them (44%) say they have access to a high-speed connection at work, while the remaining half have dial-up connections at work or no type of internet access at work. Isolating that segment of home dial-up users who are truly relegated to slow connections and do not have broadband at work, just 31% say they have watched or downloaded video online.

Frequency of internet use is often bolstered by having an always-on high-speed connection, and this reality is coupled with a greater propensity for daily internet users to watch and download video. Nearly two-thirds (65%) of daily internet users consume video content online at least from time to time, while just 40% who are online several times per week do so.

<sup>3</sup> See, for instance, estimates that suggest as much as 70% of the total U.S. internet audience stream online video: <http://www.comscore.com/press/release.asp?press=1264>

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### **Three in four young adult users watch or download video online. On a typical day, nearly one in three consume online video.**

Young adults (those ages 18-29) with internet access are also among the most voracious video viewers. Three in four wired young adults (76%) report online consumption of video, compared with 57% of internet users between ages 30-49. Less than half (46%) of internet users ages 50-64 watch or download video and just 39% of those age 65 and older do so.

On a typical day, young adults' video consumption also outpaces that of older users.

Roughly one in three (31%) internet users ages 18-29 said they watched or downloaded some type of video on the day prior to our survey. Just 18% of users ages 30-49, 12% of those 50-64 and 10% of those age 65 and older watch or download any type of video on the average day.

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### **Some 8% of internet users say they have uploaded a video file online for others to watch.**

Users who post video are a much smaller group than those who watch; about one in twelve (8%) adult users say they have uploaded a video file online where others can watch it.

Young adults also trump older users in their experience with posting video content; 15% of users ages 18-29 have uploaded videos, compared with 8% of those 30-49 and roughly 5% of users age 50 and older who have posted video for others to watch. At the same time, a considerable divide between those who watch and those who contribute content persists even among this highly wired group. Young adults are five times more likely to watch than they are to upload.

As is the case with audio consumption online, men are also more avid video viewers and posters than women. Nearly two-thirds of online men (63%) use the internet to watch or download video, while just about half of online women do so (51%). Video posting produces a more dramatic disparity; 11% of online men say they upload video, compared with only 6% of online women.

However, when looking exclusively at the viewing and uploading habits of young adults (those ages 18-29), young men and women report roughly the same incidence of video watching and uploading. Instead, users age 30 and older are the ones who exhibit the most pronounced gender differences.

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### **Most video viewers watch at home, but one in four report at-work viewing.**

Three in five online video consumers (59%) say they watch at home, while 24% report at-work viewing. One in five (22%) say they watch online video from someplace other than home or work. When asked if they happened to watch online from these various locations “yesterday,” 19% reported at-home viewing, 6% reported at-work viewing and just 3% said they watched online video someplace other than home or work the day before.

Video viewers who are ages 30-49, those who have a college degree, and those living in households earning \$75,000 or more are among the most likely to watch video at work; roughly one-third of each group views online video at their workplace. However, those who have a broadband connection at work beat out all of these other demographic groups; 37% of online video viewers who have a high-speed connection at work watch video there.

Yet another sign of young adults’ mobile tech lifestyle, those ages 18-29 are more than twice as likely when compared with any other age group to watch online video from someplace other than home or work. While 41% of video viewers ages 18-29 watch video from a “third” place, just 16% of those 30-49 do so.

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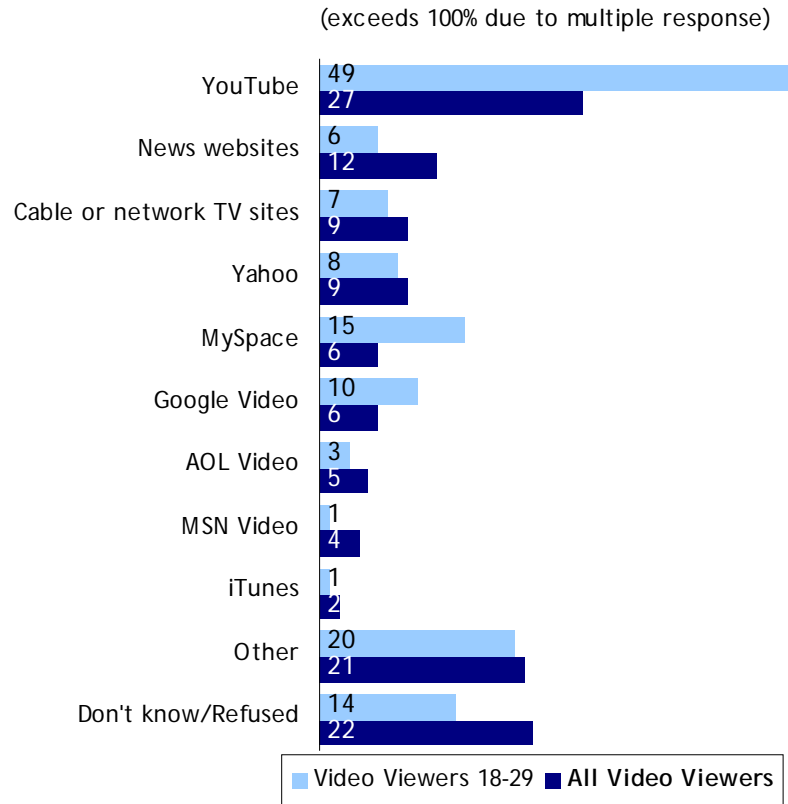
### **Half of young adult video viewers say they watch video on YouTube.**

Overall, 27% of online video consumers say they watch or download video from YouTube, and of those who watch or download videos from more than one location, 29% say YouTube is the place where they view online video most often. Young adults are almost twice as likely to point to YouTube as a source for online video; 49% of video viewers ages 18-29 say they watch YouTube videos. MySpace garners a much smaller slice of the young adult audience (15% of viewers), but one that is still considerably larger than the segment who use cable and network TV sites (7%) or news websites (6%) as sources for video.

Male viewers are more likely than female viewers to use YouTube (31% vs. 22%), but otherwise, men and women generally report the same levels of usage across every source they were asked about. Frequent viewers of online video also have a greater tendency to use YouTube; 39% of video viewers who say they watched an online video “yesterday” are users of YouTube compared with just 21% of viewers who did not watch “yesterday.”

## Young Adults: The YouTube Generation

percentage of video viewers who use each site



Source: Pew Internet & American Life Project Tracking Survey, February 15 – March 7, 2007. Margin of error is  $\pm 4\%$  for all online video viewers (n=800). Margin of error is  $\pm 7\%$  for video viewers ages 18-29.

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### How they watch: Most have watched online video with other people.

Many studies have illustrated the social nature of television viewing, but the solitary nature of viewing digital video in personal computing environments has raised questions in the research community about how to best prepare for a world in which the “natural” atmosphere for sociable viewing might be disrupted by technology.<sup>4</sup>

However, findings from our study suggest that social motivation – that is, a desire to share a viewing experience with someone else – has influenced the way users experience online video. One sign of this can be observed in the way people watch; online video consumers are not exclusively confined to watching videos alone at their computer. The picture of the lone internet user, always buried in his or her computer does not emerge

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<sup>4</sup> See Oehlberg et al., “Social TV: Designing for distributed, sociable television viewing,” May 2006, Palo Alto Research Center. Available at: <http://www.parc.xerox.com/research/publications/details.php?id=5392>

## Part 1. The Audience for Online Video

from our survey. Overall, 57% of online video viewers have watched with other people, such as friends or family.

Young adults are the most social online video viewers; three out of four online video consumers (73%) ages 18-29 say they have watched with others. That compares with 58% of those ages 30-49, and just 36% of those ages 50 and older. Those who say they watched video “yesterday” also report more social viewing when compared with those who did not watch online video on the day prior to the survey (69% vs. 51%). Men and women report equal levels of social video viewing.

Some video applications, such as Joost, have tried to anticipate the desire users have to share their real-time viewing experience by providing a window to chat with others while watching from different locations. For those who upload videos, YouTube has recently added features as part of its Active Sharing application that allow uploaders to see logged in users who are actively watching the videos posted to their channel.

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### **More than half share links to the video they find with others.**

The prevalence of link sharing among video viewers serves as another sign that social motivations have fueled the spread of online video. Those who wish to share the video they find with others without gathering them around the same screen can also “watch together” in an asynchronous way simply by sharing links to posted video content via email, IM, or other means.

Fully 57% of online video viewers share links to the videos they find online with others. Few are consistently finding content that’s compelling enough to share on a daily basis – just 3% send video links to others every day – but roughly one in three online video viewers will share links at least as often as a few times per month.

Again, the youngest viewers express more interest in sharing what they find. In this way, young adults could be considered the most “contagious carriers” in the viral spread of online video. Two in three video viewers ages 18-29 send others links to videos they find online, compared with just half of video viewers ages 30 and older. Young adults are also sharing video with greater frequency than older viewers; 42% send video links to others a few times per month or more.

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### **Three in four video viewers receive links to online video.**

Those who share video links act as nodes in a distribution network, often sending video to multiple people. There are far more people who say they receive links to online videos than there are people who send those links on to others. A whopping 75% of video viewers say they have received links to online video content compared with a little more than half who say they send them. And while most video viewers receive these links a few times per week or a few times per month, 9% say they get video links on a daily

## Part 1. The Audience for Online Video

basis. Looking at young adult video viewers, 12% say they receive links to online video at least once per day.

<b>Online Video Gets Social: How users engage</b>						
<i>The percentage of video viewers who do the following activities...</i>						
	<i>Total</i>	<i>Men</i>	<i>Women</i>	<i>18-29</i>	<i>30-49</i>	<i>50-64</i>
Receive video links	75%	75%	75%	76%	77%	71%
Send video links to others	57	59	54	67	55	45
Watch video with others	57	58	57	73	58	34
Rate video	13	15	10	23	11	4
Post comments about video	13	15	10	25	9	5
Upload video	13	16	9	20	12	5
Post video links online	10	12	9	22	7	2
Pay for video	7	8	6	10	7	3

*Source: Pew Internet & American Life Project Tracking Survey, February 15 - March 7, 2007. Margin of error is ±4% for all online video viewers (n=800). Margins of error for subgroups range from ±5% for male video viewers to ±8% for viewers ages 50-64. Those ages 65 and older are not included in this table due to the small number of video viewers in this group (n=84).*

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### **One in ten have posted video links to websites or blogs.**

Some who feel compelled to share the video content they find online prefer to do so in a more public way. Overall, 10% of video viewers say they share links with others by posting them to a website or blog. Again, younger users have a greater tendency to share what they find; while 22% of video viewers ages 18-29 post links to video online, just 7% of those ages 30-49 do so.

The flurry of link sharing by younger users has helped to shape the most-viewed, and top-rated lists on popular video sharing sites. Many young adults and teenagers, who are avid users of social networking sites and blogs, post videos to their personal pages and profiles, which then get linked to or reposted by many other users.

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### **One in five have rated video or posted comments after watching online.**

One of the features popular on many video sites is the ability to rate or post feedback about the content on the site. For instance, during the now legendary run of Lonelygirl15 videos on YouTube, viewers used the comments field to debate the authenticity of the diary-style videos in which the young girl shared her thoughts and daily drama with the world. Overall, 19% of video viewers say they have either rated an online video or posted comments after seeing a video online.

## **Part 1. The Audience for Online Video**

Looking at rating and commenting separately, 13% of video viewers say they have rated video, and the same number report posting comments after viewing video online. Unsurprisingly, those who engage with online video by rating and commenting tend to be young; video viewers ages 18-29 are twice as likely as those ages 30-49 to do so.

## Part 2.

### What They Watch Online

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#### **Amateur vs. Professional: What do users prefer?**

Most online video viewers prefer professionally-produced video over content “produced by amateurs.” However, the segments that do express a preference for amateur content or say they like both genres equally is sizable, and those who are among the most coveted viewers by advertisers (men ages 18-29) are the most likely to express a preference for amateur video.

Overall, 62% of online video viewers say that their favorite videos are those that are professionally produced, while 19% of online video viewers express a preference for amateur content. Another 11% say they enjoy both professionally-produced video and amateur online video equally.

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#### **Young men are among those least likely to express a preference for professionally-produced video.**

Again, young adults stand out as a unique group of online video viewers. Fully 30% of online video viewers ages 18-29 say they prefer amateur video, and 16% say they like both amateur and professionally-produced video equally. Just 51% of young adult viewers say their favorite videos to watch are those that are professionally-produced. For young adult men who are online video viewers, that number is even lower; 43% express a clear preference for professional video, while 34% prefer amateur content. Another 19% of male video viewers ages 18-29 say they enjoy both amateur and professional content.

Those who rate or comment on video are also more likely than the average online video viewer to express a preference for amateur material; while 48% say they still prefer professional video, 26% prefer amateur content and 21% say they enjoy both types of video equally.

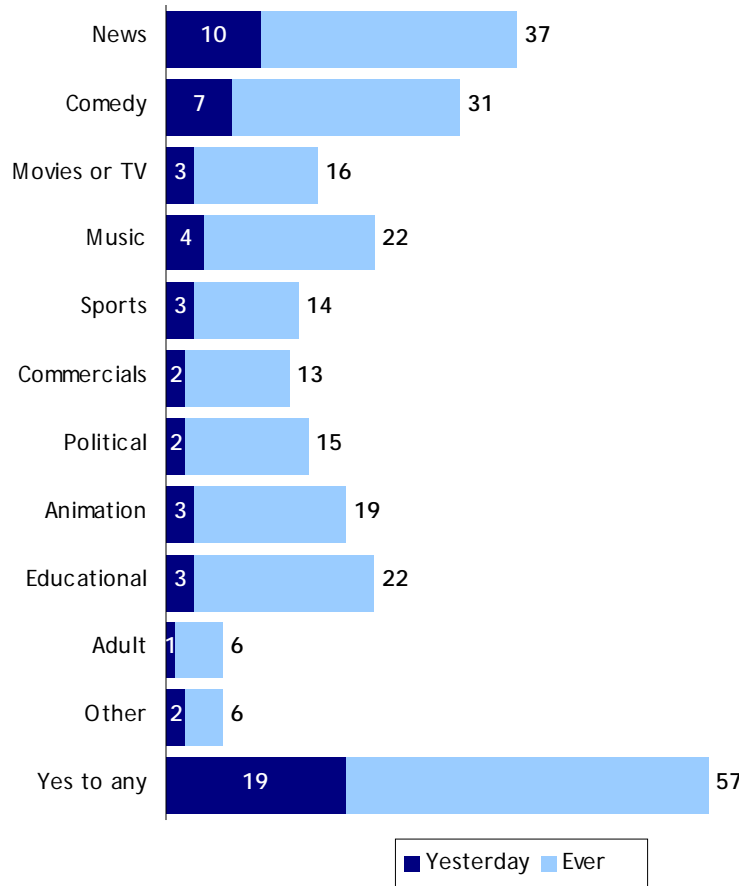


**37% of adult internet users report online news video viewing and 10% say they watch news video on a typical day.**

News outlets were among the first big investors in the online video realm and their early-mover advantage shows. News video is the most-watched genre of video, with 37% of adult internet users reporting some type of viewing or downloading, and 10% saying they watch news videos on a typical day. Aside from the plethora of news content posted on video sharing sites like YouTube and Google Video, news-related video can now be found on virtually any website associated with major network TV news channels, cable TV news, and on most mainstream newspaper websites. Additionally, blogs, video podcasts, personal websites and social networking websites also feature news-related video.

**Video: What they're watching**

percentage of adult internet users



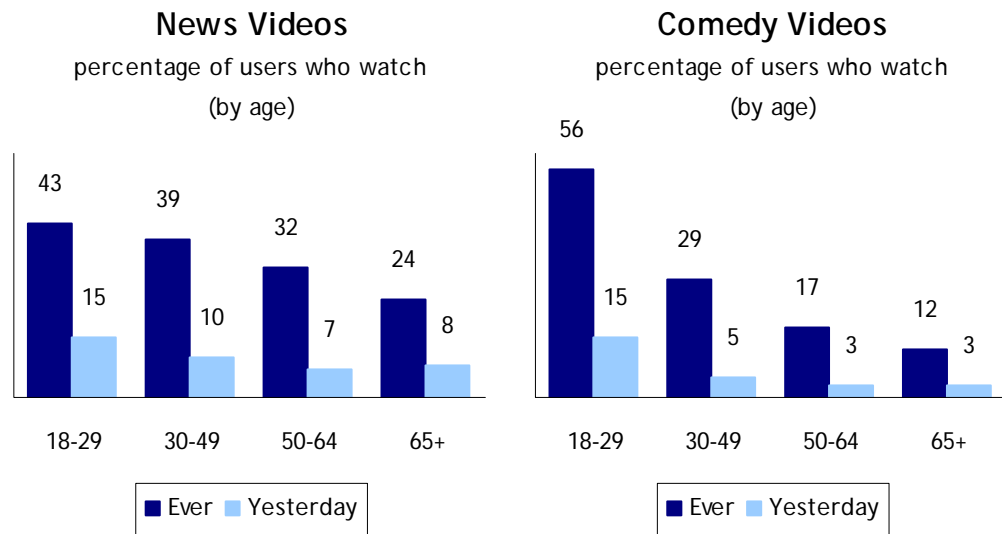
Source: Pew Internet & American Life Project Tracking Survey, February 15 – March 7, 2007. Margin of error is ±3% for all adult internet users (n=1,492).

**News video is the most popular category for everyone except young adults.**

News content captures the attention of users across all generations, and is the most popular genre with every age group except for those ages 18-29. For young adults, comedy is a bigger draw, with 56% of internet users ages 18-29 saying they watch *humorous* videos, compared with 43% who say they watch *news* videos. However, on a typical day, young adult internet users are equally as likely to view news and comedy; 15% of those 18-29 report viewing in both categories on the average day. Indeed, much of the content viewed by young adults, such as clips from The Daily Show or The Colbert Report blurs the line between news and comedy.

News video viewing is more prevalent among men than it is among women; 42% of online men report news video consumption, versus 32% of online women. In addition, men are twice as likely as women to watch or download news video on a typical day—14% of online men report this, compared with 7% of online women.

Those with higher levels of income and education are more likely to report news video viewing, a trend that is not consistent across all video content categories. Particularly with respect to income, online video viewers in other genres tend to be equally distributed among different earning groups.



Source: Pew Internet & American Life Project Tracking Survey, February 15 – March 7, 2007. Margin of error is ±3% for all adult internet users (n=1,492). Margins of error for subgroups range from ±4% for video viewers ages 30-49 (n=615) to ±8% for viewers ages 65 and older (n=202).

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### **Comedy and humorous videos attract the largest number of young adult viewers.**

Comedy and humorous videos are the second-most-viewed genre of online video among the total population of online adults, and the top genre for young adult viewers; 31% of internet users have watched or downloaded comedic or humorous videos and 7% do so on a typical day. Among young adult internet users, 56% have watched humorous online videos, while 15% do so on a typical day. Any visit to YouTube or Google Video will yield links to featured or popular videos meant to inspire a laugh. What some consider funny, others may find offensive or dumb, but the sheer range of humorous video—whether it’s silly pet antics, red carpet fashion snafus or professionally-produced political satire—provide a veritable cornucopia of content to choose from.

Young adults consume and probably also contribute much of the video content that falls into the comedy category. While more than half of young adult internet users say they watch or download humorous video online, just 29% of users ages 30-49, 17% of those 50-64, and 12% of those ages 65 and older report this. As is the case with news content, male users are also more active consumers of comedy content online; 38% of men watch or download comedy video, versus 25% of online women. On a typical day 9% of male users and 5% of female users watch or download humorous video content.

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### **With bite-sized clips, music videos also draw young audiences online.**

Like news, music videos can also readily cross over into the comedy category. Weird Al Yankovic’s “White and Nerdy” music video is one of the most-viewed videos of all time on YouTube, and is listed in both the music and comedy category. Music videos have been a popular subject of user-generated parodies online; musician James Blunt’s chart topper, “You’re Beautiful” has been the subject of numerous parodies, and “Paxilback,” a slick spoof of Justin Timberlake’s “Sexyback” helped the People Food artist collective secure a contract with United Talent Agency.<sup>5</sup>

Overall, 22% of adult internet users watch or download some type of music videos online and 4% do so on a typical day. In many ways, those who produce music videos – both professionals and amateurs -- have been well-poised to take advantage of the internet as a distribution medium simply because of the bite-size nature of most music videos. Professional rock band OK Go has been hugely successful at creating humorous and clever dance videos on a shoestring budget to promote their songs, and amateur musicians have utilized the site as a way to get feedback on new songs or live performances.

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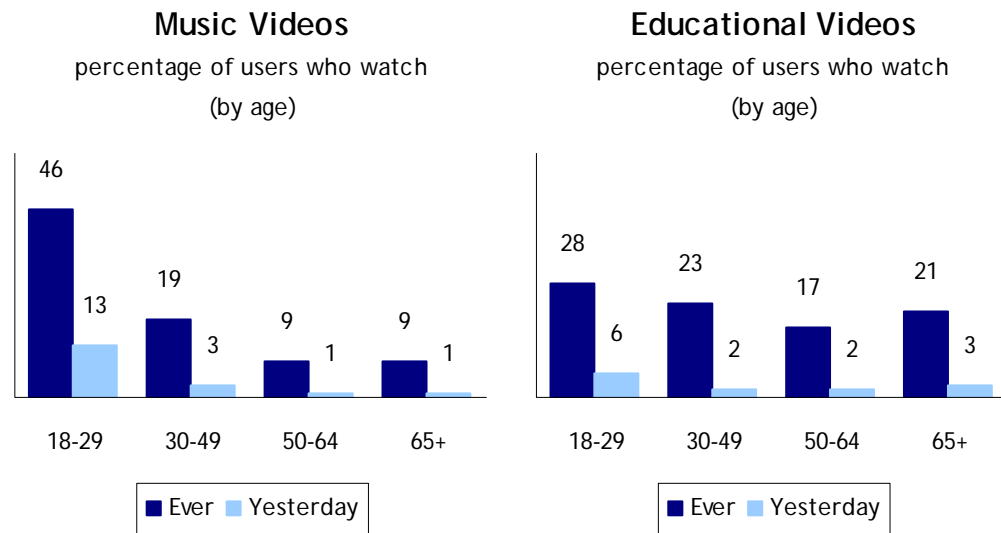
<sup>5</sup> See, “Talent Agency Is Aiming to Find Web Video Stars,” available at: <http://www.nytimes.com/2006/10/25/technology/25agency.html?ex=1185336000&en=5eb4051818c8cf5b&ei=5070>

## Part 2. What They Watch Online

However, as is the case with comedy, young adults are usually the ones watching. While 46% of users ages 18-29 are music video consumers, less than half as many 30-49 year olds (19%) say they watch or download music video online. Just 9% of users age 50 and older watch or download music videos. It comes as no surprise, then, that young adults are also the most frequent music video viewers; 13% say they watch music video on an average day. 13% say they watch music video on an average day.

To a generation weaned on MTV, music videos are a form of cultural currency, and having the ability to share that viewing experience with friends can be as much about social interaction as it is about entertainment. Yet, young adults certainly are not the only ones who might be attracted to this type of social video sharing. The vast archive of music videos available online offers ample opportunities for discovery and rediscovery of live and prerecorded music footage. Thanks to tagging, music videos from the 80's, concert footage from the 70's and even television clips from the 60's can all be called up with a simple search. Just because the content was created before the digital era doesn't mean someone hasn't already gone through the trouble of digitizing it.

Online men are generally more likely to consume music videos when compared with women (26% vs. 19%), but both groups are equally as likely to seek out music videos on a typical day (5% vs. 4%). Much of the gap between men and women for music video viewing stems from the 30-49 age group. For young adults, and users over the age of 50, differences in the incidence of music video viewing are not significant.



Source: Pew Internet & American Life Project Tracking Survey, February 15 – March 7, 2007. Margin of error is  $\pm 3\%$  for all adult internet users (n=1,492). Margins of error for subgroups range from  $\pm 4\%$  for video viewers ages 30-49 (n=615) to  $\pm 8\%$  for viewers ages 65 and older (n=202).

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### **Educational videos interest viewers of all ages.**

While music videos may be created primarily for entertainment, videos with educational content are equally as popular among the general population of internet users, and even more so for older adults. Roughly one in five internet users (22%) say they watch or download educational videos, and 3% do so on a typical day. However, there is very little variation across age groups; young adult internet users watch or download educational video content at about the same rate as users aged 65 and older (28% vs. 21%).

Learning a new language, educating yourself about home remodeling techniques, or earning a degree online can all be facilitated through the use of online video. Sometimes referred to as “How-to” or “DIY” videos, these clips range from those that provide practical everyday tips such as, “How to fold a tee-shirt perfectly,” to those that visually illustrate theories or concepts, as is done in “Web 2.0...The Machine is Us/ing Us.”

Men and women report educational video watching at the same level; 24% of online men consume educational videos vs. 20% of online women. This is the only genre of online video, other than movies and TV, where there is gender parity among those who watch.

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### **Animation and cartoons garner the young male audience.**

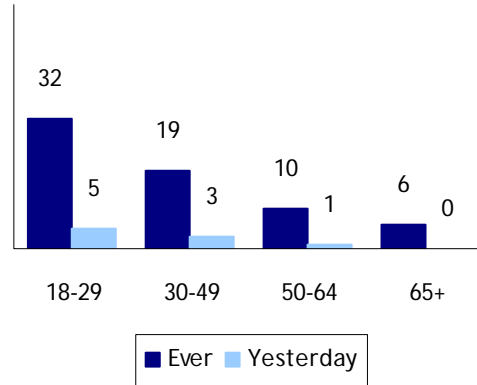
Animation videos have captured the attention of 19% of the online population of adults. Three percent of internet users report watching or downloading animated video on a typical day. Not surprisingly, younger users account for much of the animation audience online, as 32% of internet users ages 18-29 say they watch or download animation or cartoons online, while 19% of users age 30-49 report this. Just 9% of users age 50 and older say they have watched animated videos online.

Male users are somewhat more likely to say they watch animation online (23% vs. 16%), but much of this difference stems from young males, nearly 40% of whom watch or download animated videos.

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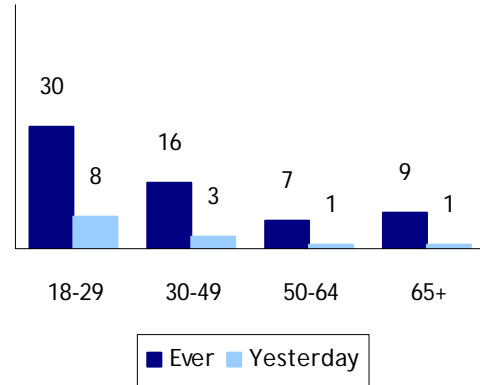
### Animation or Cartoons

percentage of users who watch  
(by age)



### Movies or TV Shows

percentage of users who watch  
(by age)



Source: Pew Internet & American Life Project Tracking Survey, February 15 – March 7, 2007. Margin of error is  $\pm 3\%$  for all adult internet users ( $n=1,492$ ). Margins of error for subgroups range from  $\pm 4\%$  for video viewers ages 30-49 ( $n=615$ ) to  $\pm 8\%$  for viewers ages 65 and older ( $n=202$ ).

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### Full-length movies and TV shows are still making their way online.

One in six internet users (16%) say they watch or download “movies or TV shows,” but it is likely that this figure does not account for all of those who simply watch *excerpts* from movies and TV shows, which are consistently among the most viewed content on the major video sharing sites. Many movies and television shows are also widely available on peer-to-peer networks and Bit Torrent sites. Some estimates suggest that video files account for 10% of file-sharing activity on peer-to-peer networks.<sup>6</sup>

At the same time, there has been a big push from the major television networks to provide more full-length episodes of primetime television shows for free online. ABC’s “Lost” and “Desperate Housewives” were among the first free offerings, and many other shows, such as NBC’s “The Office” and “Law & Order” have followed suit. However, some research suggests that many viewers are not aware of the streaming television content available online. A study released in January 2007 by CBS Research found that just 56% of U.S. television viewers were aware that they could watch streaming video of network TV shows online.<sup>7</sup>

Movies and television content are also the province of the young; nearly a third of users ages 18-29 watch or download movies and TV shows, while half as many among those ages 30-49 do so (30% vs. 16%). Just 7% of users age 50 and older say they get movies

<sup>6</sup> See “Hollywood Reeling from Illegal Movie, TV Downloads.” Available at: <http://investors.com/editorial/IBDArticles.asp?artsec=17&issue=20070402&view=1>

<sup>7</sup> See “CBS: Viewers Not Aware Of Online Programs” January 5, 2007. Available at: [http://publications.mediapost.com/index.cfm?fuseaction=Articles.printEdition&art\\_send\\_date=2007-1-5&art\\_type=13](http://publications.mediapost.com/index.cfm?fuseaction=Articles.printEdition&art_send_date=2007-1-5&art_type=13)

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and television shows online. Male and female users say they get movies and TV shows online in equal numbers (16% and 17%).

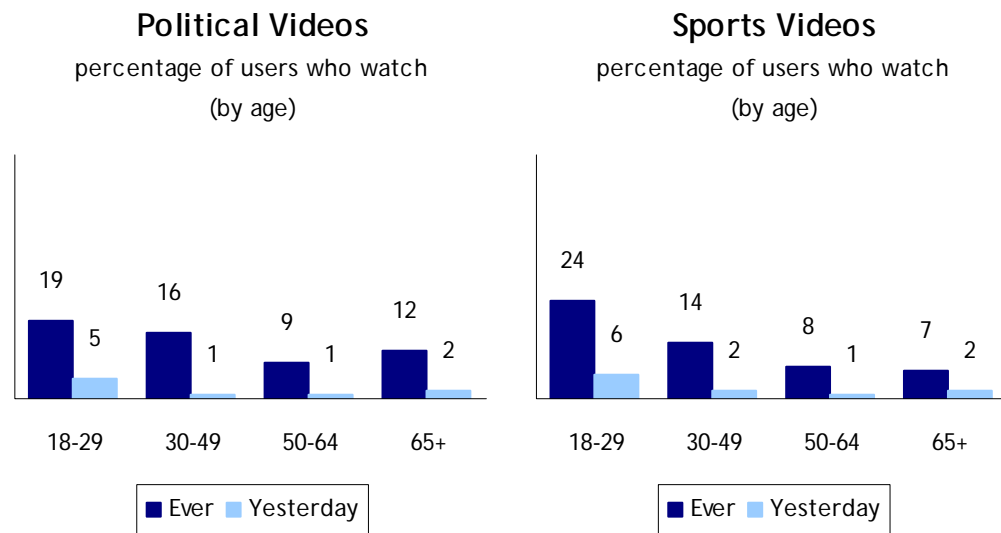
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### Political content resonates most with active viewers who rate or comment on video.

As we noted in our “Election 2006 Online” report, the rise of online video as a political force was a major story during the last election. The number of Americans relying on the internet for political news and information had doubled since 2002, and video had already started to play a pivotal role in delivering information related to the 2008 elections.

Political video content currently garners about the same number of viewers as those who say they watch or download movies and television shows online; 15% of internet users say they have sought out political video content online, and 2% report doing this on a typical day. Most political video viewers are under the age of 50 and have higher levels of education. One in five young adult internet users watch political video content online and 5% will do so on a typical day. Online men are more likely to view political content when compared with online women; 18% vs. 12%.

Political content is especially popular among the segment of video viewers who rate or comment on online video. Fully 44% of those who give some form of feedback after viewing say they seek political video online.



Source: Pew Internet & American Life Project Tracking Survey, February 15 – March 7, 2007. Margin of error is  $\pm 3\%$  for all adult internet users (n=1,492). Margins of error for subgroups range from  $\pm 4\%$  for video viewers ages 30-49 (n=615) to  $\pm 8\%$  for viewers ages 65 and older (n=202).

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### **The audience for sports video content is modest relative to the size of the total sports information-seeking public.**

Whether viewers are interested in highlights or bloopers, soccer or hurling, sports video content is widely available online. However, the total audience that seeks any kind of sports information online is three times the size of the sports video watching audience. In August of 2006, 45% of adult internet users said they got sports scores and information online and 15% did so on a typical day. In comparison, 14% of internet users now say they watch or download sports video and 3% say they do so on a typical day.

The sports video audience is heavily dominated by male viewers; online men are almost four times as likely as online women to have watched or downloaded sports video (23% vs. 6%). Unsurprisingly, young adults report higher levels of sports video consumption. One in four internet users (24%) ages 18-29 watch or download sports video, compared with 14% of those 30-49, 8% of those 50-64 and just 7% of those 65 and older.

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### **One in eight internet users watch or download commercials online.**

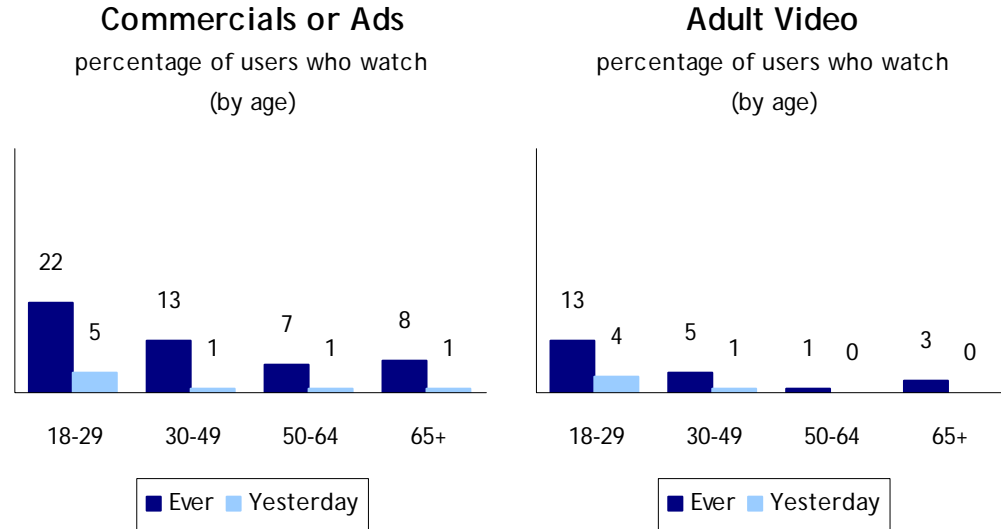
Commercial video content is often integrated into other types of online video, and is a staple component of banner advertising on many popular websites, such as MySpace.com and Yahoo properties. Users may actively seek out commercial videos – for instance, when searching for Super Bowl advertisements or nostalgic commercials about Apple computers from the 1980’s – or they may passively view commercial content streaming on a site where they are reading a news article or searching for health information.

When asked if they ever use the internet to watch or download commercials or advertisements, 13% of internet users say “yes.” A mere 2% of internet users say they watch commercials on an average day.

Young adults are twice as likely as users age 50 and older to say they watch or download commercial videos online; 22% of those 18-29, 13% of users ages 30-49, 7% of users age 50-64 and 8% of those ages 65 and older say they consume commercial video content online.



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### Young male users are the most likely to say they have watched or downloaded adult video online.

While respondents are highly unlikely to admit that they view adult video content, 6% of internet users do report watching or downloading adult video content online, and 1% report adult video consumption on a typical day. Men and younger users are unsurprisingly the ones most likely to report adult video viewing. While 11% of male internet users say they watch or download adult video content online, just 1% of female internet users report this. Likewise, 13% of users ages 18-29, 5% of those 30-49, 1% of those 50-64 and 3% of those 65 and older say they watch or download adult video.

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### Few pay to access online video.

Providing free access to video content has been central to the popularity of YouTube and other online video portals. At the moment, few online video viewers are paying for any of the video they watch; just 7% of say they have paid to access or download video online.

However, young adults, who are often thought to have little interest in paying for music and other digital media, are actually more likely than older video viewers to have paid for online video content. While 10% of online video viewers ages 18-29 have paid to access or download online video, just 3% of video viewers ages 50-64 have done so.

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There are currently no significant differences between men and women and users across all economic and education levels when it comes to paying for online video content. However, among the small group of video viewers who say they also upload video content (n=93), 20% say they have paid for access to online video. Just 5% of video viewers who have never uploaded say they have paid for video.

# Methodology

This report is based on the findings of a daily tracking survey on Americans' use of the Internet. The results in this report are based on data from telephone interviews conducted by Princeton Survey Research Associates between February 15 to March 7 2007, among a sample of 2,200 adults, 18 and older. For results based on the total sample, one can say with 95% confidence that the error attributable to sampling and other random effects is plus or minus 2.3 percentage points. For results based Internet users (n=1,492), the margin of sampling error is plus or minus 2.8 percentage points. In addition to sampling error, question wording and practical difficulties in conducting telephone surveys may introduce some error or bias into the findings of opinion polls.

The sample for this survey is a random digit sample of telephone numbers selected from telephone exchanges in the continental United States. The random digit aspect of the sample is used to avoid “listing” bias and provides representation of both listed and unlisted numbers (including not-yet-listed numbers). The design of the sample achieves this representation by random generation of the last two digits of telephone numbers selected on the basis of their area code, telephone exchange, and bank number.

New sample was released daily and was kept in the field for at least five days. The sample was released in replicates, which are representative subsamples of the larger population. This ensures that complete call procedures were followed for the entire sample. At least 10 attempts were made to complete an interview at sampled households. The calls were staggered over times of day and days of the week to maximize the chances of making contact with a potential respondent. Each household received at least one daytime call in an attempt to find someone at home. In each contacted household, interviewers asked to speak with the youngest male currently at home. If no male was available, interviewers asked to speak with the youngest female at home. This systematic respondent selection technique has been shown to produce samples that closely mirror the population in terms of age and gender. All interviews completed on any given day were considered to be the final sample for that day.

Non-response in telephone interviews produces some known biases in survey-derived estimates because participation tends to vary for different subgroups of the population, and these subgroups are likely to vary also on questions of substantive interest. In order to compensate for these known biases, the sample data are weighted in analysis. The demographic weighting parameters are derived from a special analysis of the most recently available Census Bureau's March 2006 Annual Social and Economic Supplement. This analysis produces population parameters for the demographic characteristics of adults age 18 or older, living in households that contain a telephone. These parameters are then compared with the sample characteristics to construct sample weights. The weights are derived using an iterative technique that simultaneously balances the distribution of all weighting parameters.

Following is the full disposition of all sampled telephone numbers:

<b>Table 1: Sample Disposition</b>	
	<u>Final</u>
Total Numbers dialed	19,200
Business	1,377
Computer/Fax	1,175
Cell phone	16
Other Not-Working	6,762
Additional projected NW	1,213
Working numbers	8,657
<b>Working Rate</b>	<b>45.1%</b>
No Answer	339
Busy	61
Answering Machine	1,312
Callbacks	186
Other Non-Contacts	155
Contacted numbers	6,605
<b>Contact Rate</b>	<b>76.3%</b>
Initial Refusals	2,610
Second Refusals	1,288
Cooperating numbers	2,707
<b>Cooperation Rate</b>	<b>41.0%</b>
No Adult in HH	26
Language Barrier	335
Eligible numbers	2,346
<b>Eligibility Rate</b>	<b>86.7%</b>
Interrupted	146
Completes	2,200
<b>Completion Rate</b>	<b>93.8%</b>
<b>Response Rate</b>	<b>29.3%</b>

PSRAI calculates a response rate as the product of three individual rates: the contact rate, the cooperation rate, and the completion rate. Of the residential numbers in the sample, 76 percent were contacted by an interviewer and 41 percent agreed to participate in the survey. Eighty-seven percent were found eligible for the interview. Furthermore, 94 percent of eligible respondents completed the interview. Therefore, the final response rate is 29 percent.