

Executive Summary

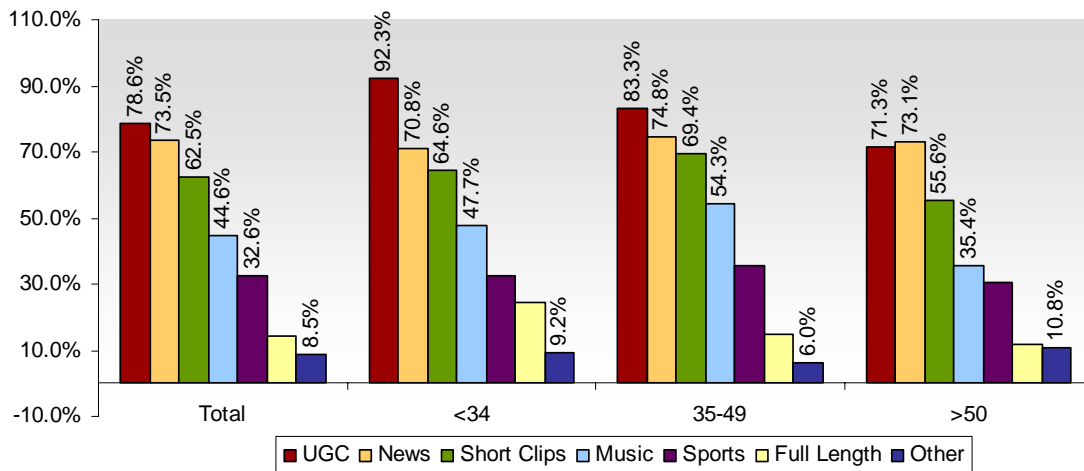
In January 2007 In-Stat fielded a Technology Adoption Panel (TAP) survey which netted 1,114 respondents (US only). The goal of this survey was to explore participant habits and feelings towards online video and User Generated Video (UGV) in particular. By the same token we wished to isolate any idiosyncratic differences between age groups – while UGV has been largely tied to the younger <34 age demographics it was our hypothesis that participation at these video sharing/hosting sites was not isolated to this age segment. In fact usage rates amongst more senior respondents exceeded expectations and while the <34 age group demonstrated the highest rates of participation it is clear that those in the market would be remiss to ignore these older segments.

Key Findings

By tracking usage patterns by age group over time we hope to ultimately determine where and how UGV will evolve. As UGV starts to appeal to a wider demographic the impetus to push this content to mediums beyond the PC will continue to grow markedly, thus changing the way we perceive UGV. The findings of this survey marks the starting point for this ongoing research and anchors the new UGC report from In-Stat “User Generated Content—How About Just Content?”

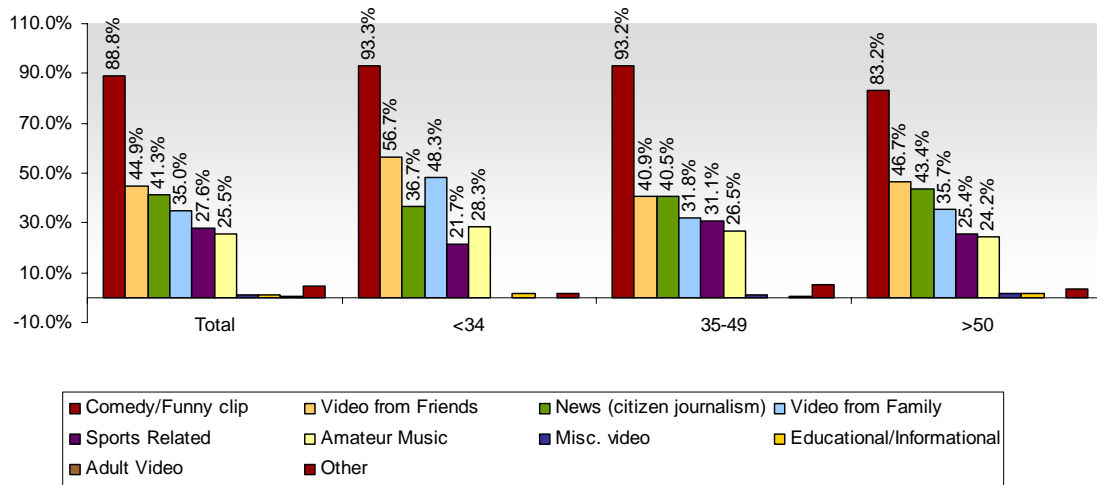
In Figure 1 it is clear that UGV (identified as UGC in the figure) continues to be the most popular form of online video for those individuals <50. Although the >50 age group demonstrated strong participation rates, much higher than was anticipated. It is interesting to note that save for the “news” and “UGC” categories in the >50 ages group the types of online content followed the same rank order irrespective of age; which may indicate that online video consumption is homogeneous across age groups, at least in terms of video type.

Figure 1. Type of Online Video Watched by Respondents



In terms of types of UGV watched by respondents humorous clips continue to be the most popular, see Figure 2.

Figure 2. Type of UGV Watched by Respondents



Source: In-Stat, 4/07

N = 572

It is also interesting to note that the popular types of UGV outside humorous, tend keep a close proximity to the “end user.” In other words these videos are likely to be more salient and/or pertinent to the viewer and their life. Video from family and friends are certainly germane to one’s social network and clips from news can hold ties to one’s community if not the country he/she resides.

While UGV is currently a more personal/intimate form of online video (clips of professional content aside) we expect a shift to occur where amateur films/TV shows will start to play a bigger role in video entertainment. In fact amateur TV shows are already being filmed and distributed by companies like Blip.tv and with the prospect of more media being transmitted from the PC to the TV, online content will start competing with traditional media on both fronts, both online and off.