Online Video in Latin America

Andres Palmiter

December 2010

comScore Video Metrix

- ## **Understanding the Latin American viewer**

  - ### What can we learn from the Chilean Miners' coverage?

- **Audience measures for Argentina, Brazil, Chile, and Mexico**

- **Where did all this great data come from?**

Focus: Latin America

Latin America
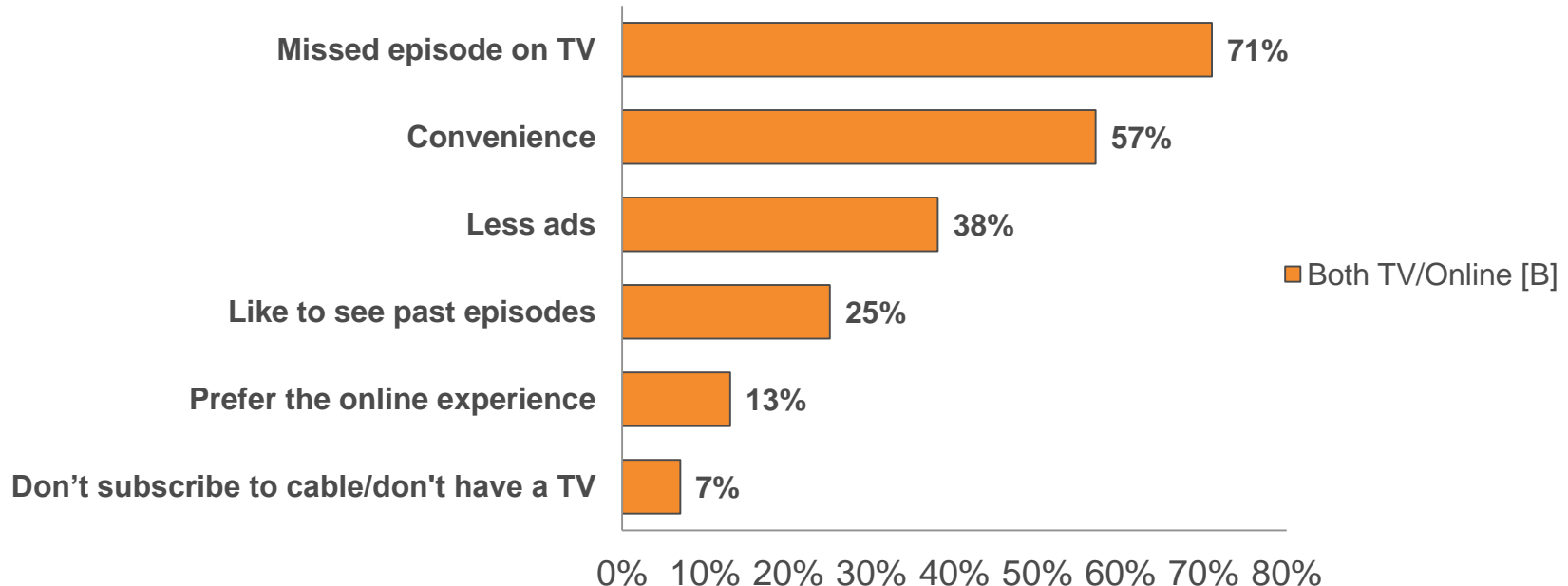
Argentina

Brazil

Chile

Mexico

comSCORE.

There's no better way to experience large cultural events than video,

but do we know who's watching and where?

Online Video allows convenient viewing of TV events

- **Recent comScore study sought to answer: why do viewers choose to watch TV episodes online?**
  - NOT out of ad-avoidance
 - Main factor is convenience and time-shifting

Category	Both TV/Online [B]
Missed episode on TV	71%
Convenience	57%
Less ads	38%
Like to see past episodes	25%
Prefer the online experience	13%
Don't subscribe to cable/don't have a TV	7%

0% 10% 20% 30% 40% 50% 60% 70% 80%

Latin American viewers and the Chilean Miners

- **The Chilean Miners rescue was a cultural event that spanned age, interest, and nationality**

- **How can marketers better understand audience behavior and know where they go to watch large cultural events online?**

Ability to understand content-specific viewing behavior

- **comScore groups content providers into content categories and sets norms around engagement and viewership that are content-specific**

  - Ability to see demographic breaks by content category as well
  - Focus on three categories: News/Information, Conversational Media, and Entertainment
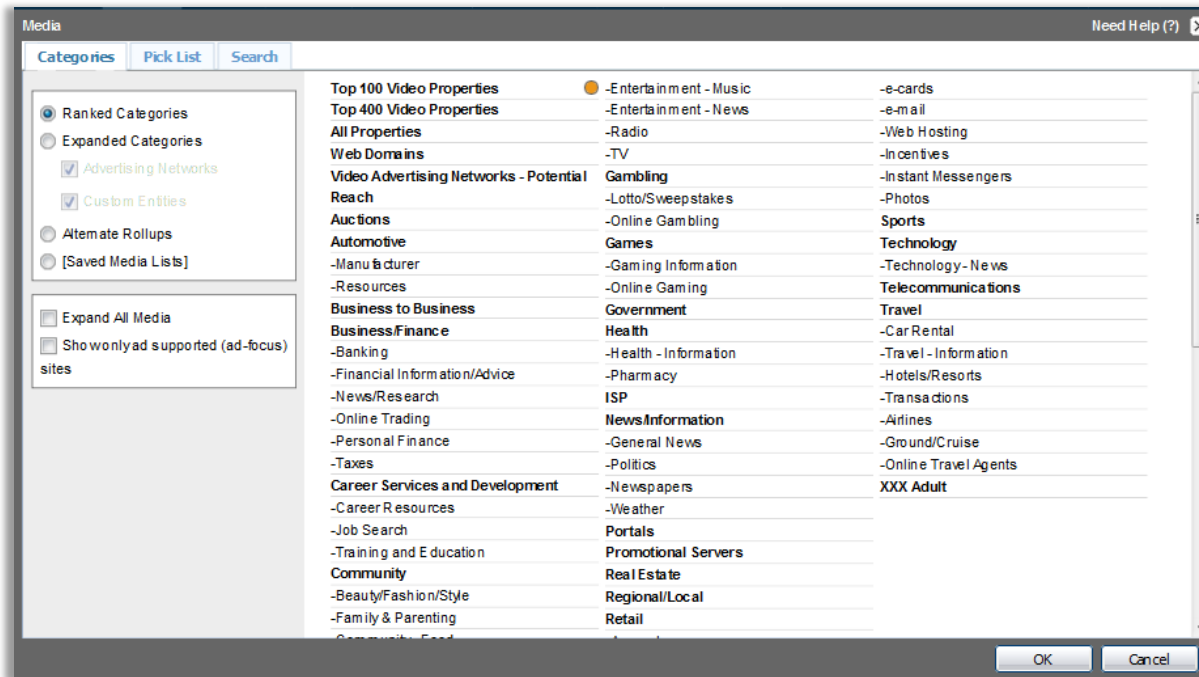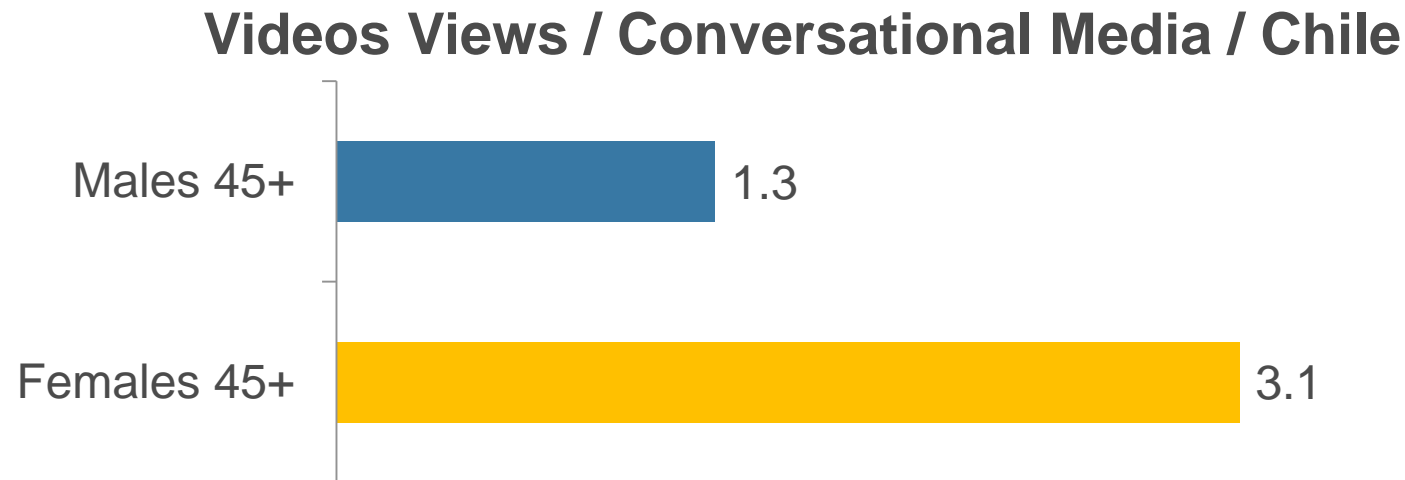
Video and Conversational Media

- **Younger and older audiences participate in cultural events in different ways**

  - In Argentina more than a third of Conversational Media video viewers are between the ages 15-24

% Viewers Conversational Media / Argentina

| Age	%
45-54	14.0
35-44	14.9
25-34	24.6
15-24	37.6
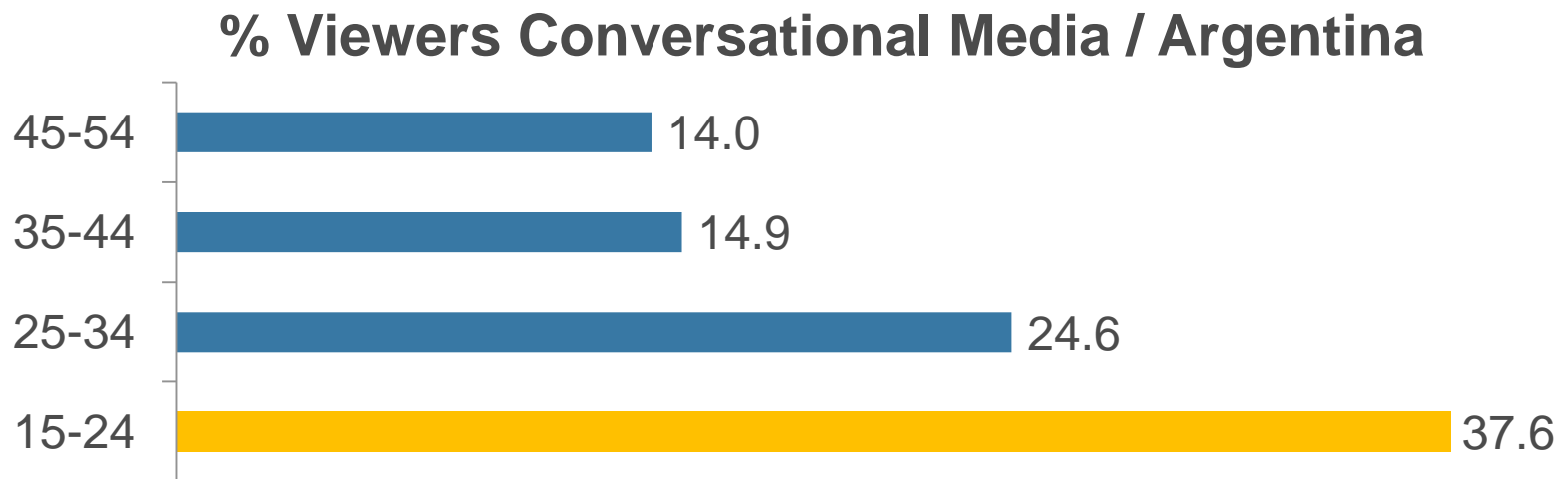
Video and Conversational Media

- **Males and females also exhibit different viewing patterns**
  - In Chile females ages 45+ watch more conversational media videos than their male counterparts, at more than a 2-1 ratio

Videos Views / Conversational Media / Chile

Category	Value
Males 45+	1.3
Females 45+	3.1

comSCORE.

News and Information

- **Whereas conversational media requires participation, News and Information best recreates TV. Unsurprisingly, News and Information attracts an older demographic.**

  - In Argentina, News and Information is most popular among people ages 35+, making up almost half of the content category's audience

Audience / News and Information / Argentina
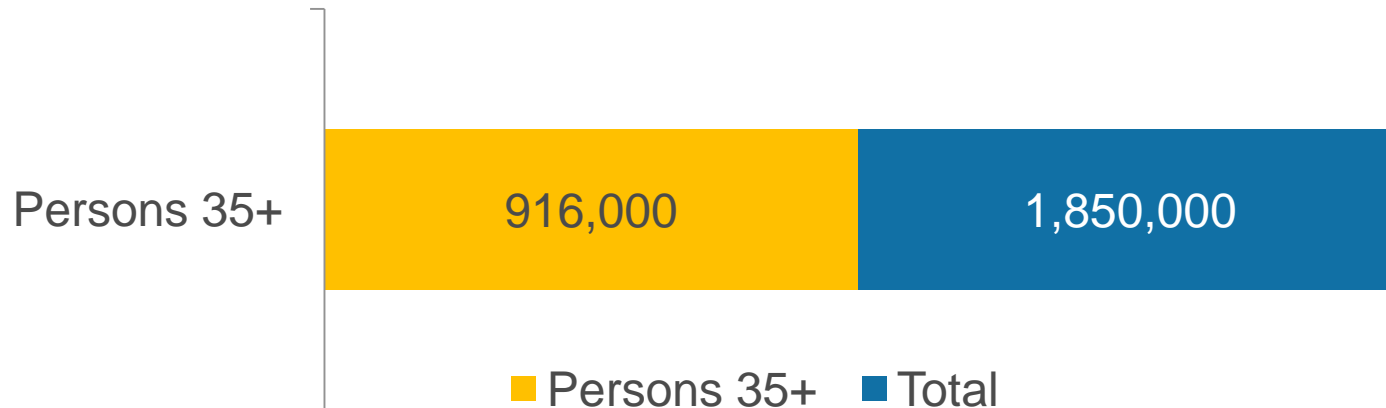
Persons 35+	916,000	1,850,000

■ Persons 35+ ■ Total

News and Information

- **Whereas conversational media requires participation, News and Information best recreates TV. Unsurprisingly, News and Information attracts an older demographic.**

  - In Mexico, people ages 35-44 watch proportionately more News/Information videos per viewer than younger demographics (6.6 compared to the average of 4.9)

Videos per Viewer / News and Info / Mexico

Category	Value
All Persons	4.9
Persons 35-44	6.6

comSCORE.

Live Streaming

- **As online video technology becomes more mature, live streaming sites buttress TV viewing**
  - Watch cultural events as they happen, even if the viewer is stuck in front of a computer
  - In Brazil, live streaming sites such as Ustream, Veemi, Boxlive.tv keep viewers engaged longer for each video than the average video site.
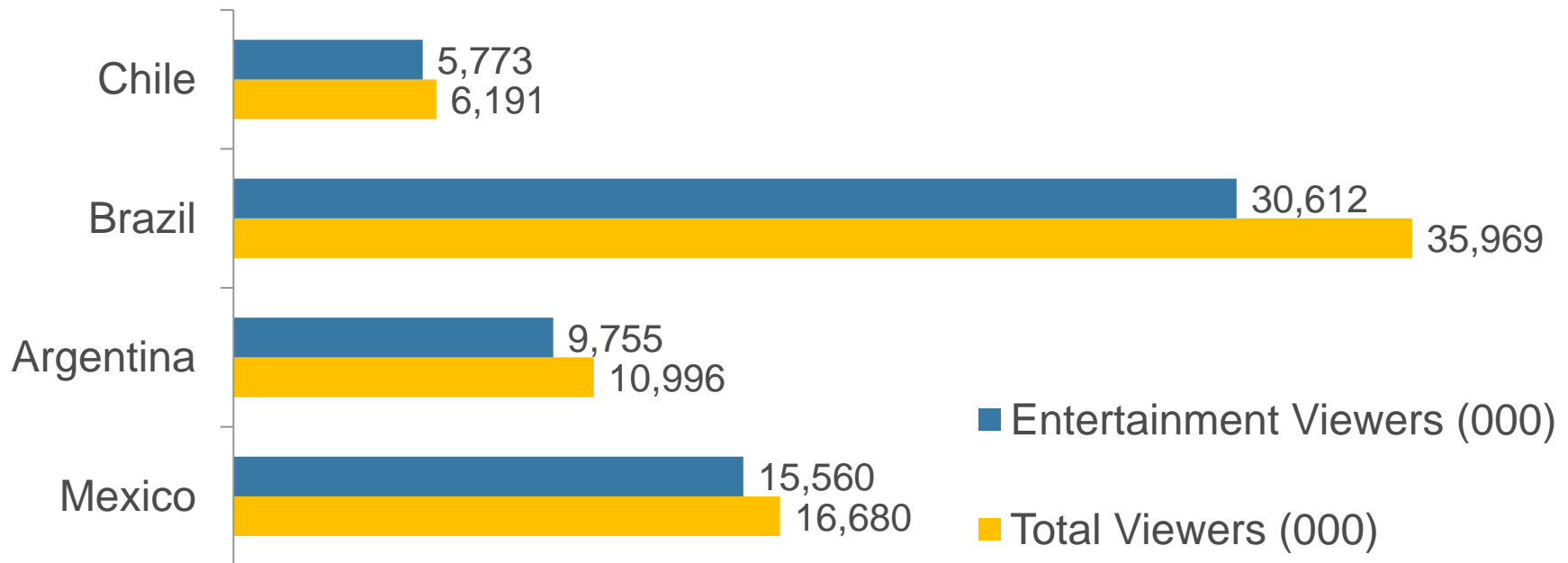
Minutes per Video / Live Sites / Brazil

Site	Minutes
Average	5.4
Veemi	11.7
Boxlive.tv	10.9
Ustream	9.3

comSCORE.
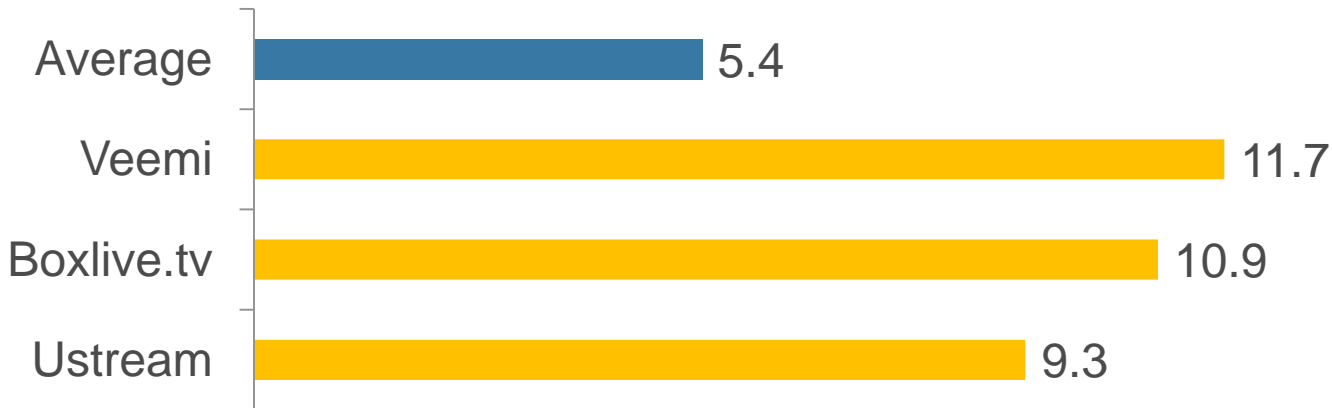
Entertainment's reach

- **In every market, the entertainment category dominates in terms of audience reach, total minutes viewing, and video views**

Entertainment Category / Reach

Country	Entertainment Viewers (000)	Total Viewers (000)
Chile	5,773	6,191
Brazil	30,612	35,969
Argentina	9,755	10,996
Mexico	15,560	16,680

■ Entertainment Viewers (000)

■ Total Viewers (000)

What we learned

- **Younger viewers tend to be more engaged with Conversational Media, whereas older viewers viewed more videos on News and Information**

- **Live viewing sites would allow marketers to more opportunities to monetize single streams, due to the increased minutes per video**

comScore Video Metrix

- **Understanding the Latin American viewer**

- **Audience measures for Argentina, Brazil, Chile, and Mexico**

  - How do the intensity measures match up with US?
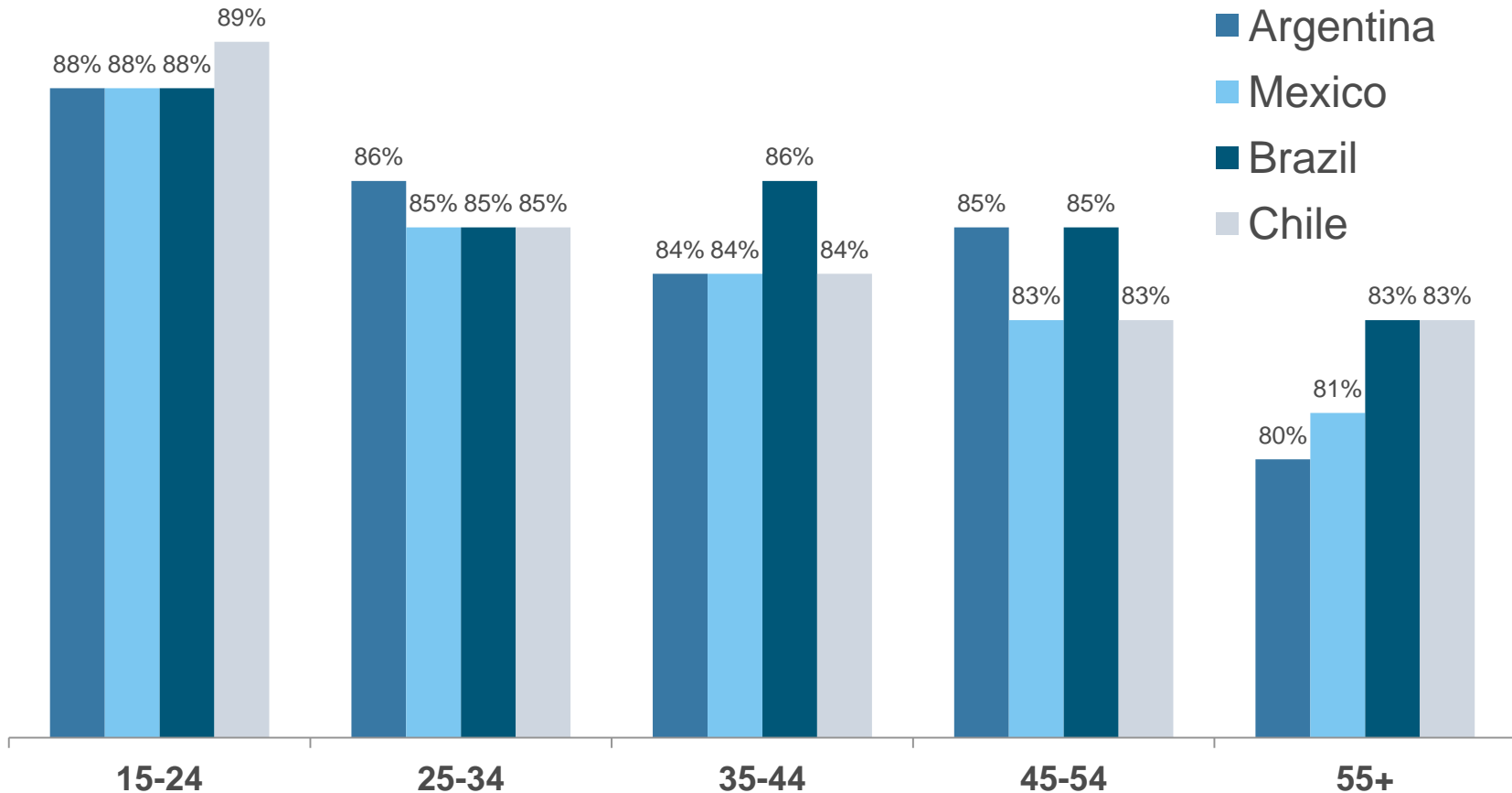
- **Where did all this great data come from?**

Online Video reach is consistent across the region
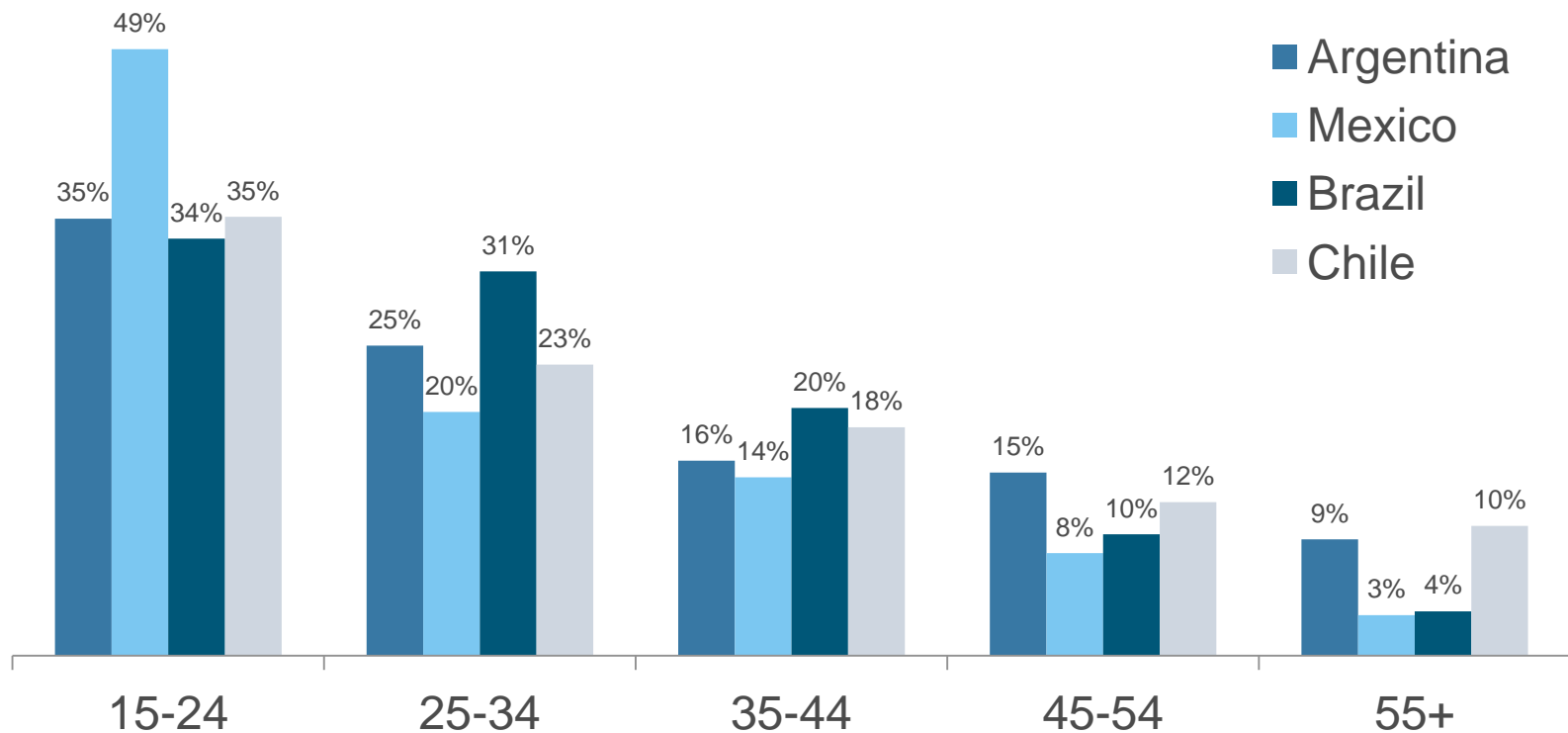
Online Video Reach / Web Population

Country	Value
USA	84
Chile	85
Brazil	82
Mexico	83
Argentina	85

... though video consumption skews younger

Online Video Consumption / By Demographic

Argentina
Mexico
Brazil
Chile

15-24: 35%, 49%, 34%, 35%
25-34: 25%, 20%, 31%, 23%
35-44: 16%, 14%, 20%, 18%
45-54: 15%, 8%, 10%, 12%
55+: 9%, 3%, 4%, 10%

comSCORE.

Room for growth in engagement

Hours per Viewer

Country	Hours
USA	15.0
Chile	7.1
Brazil	7.5
Mexico	9.0
Argentina	7.1
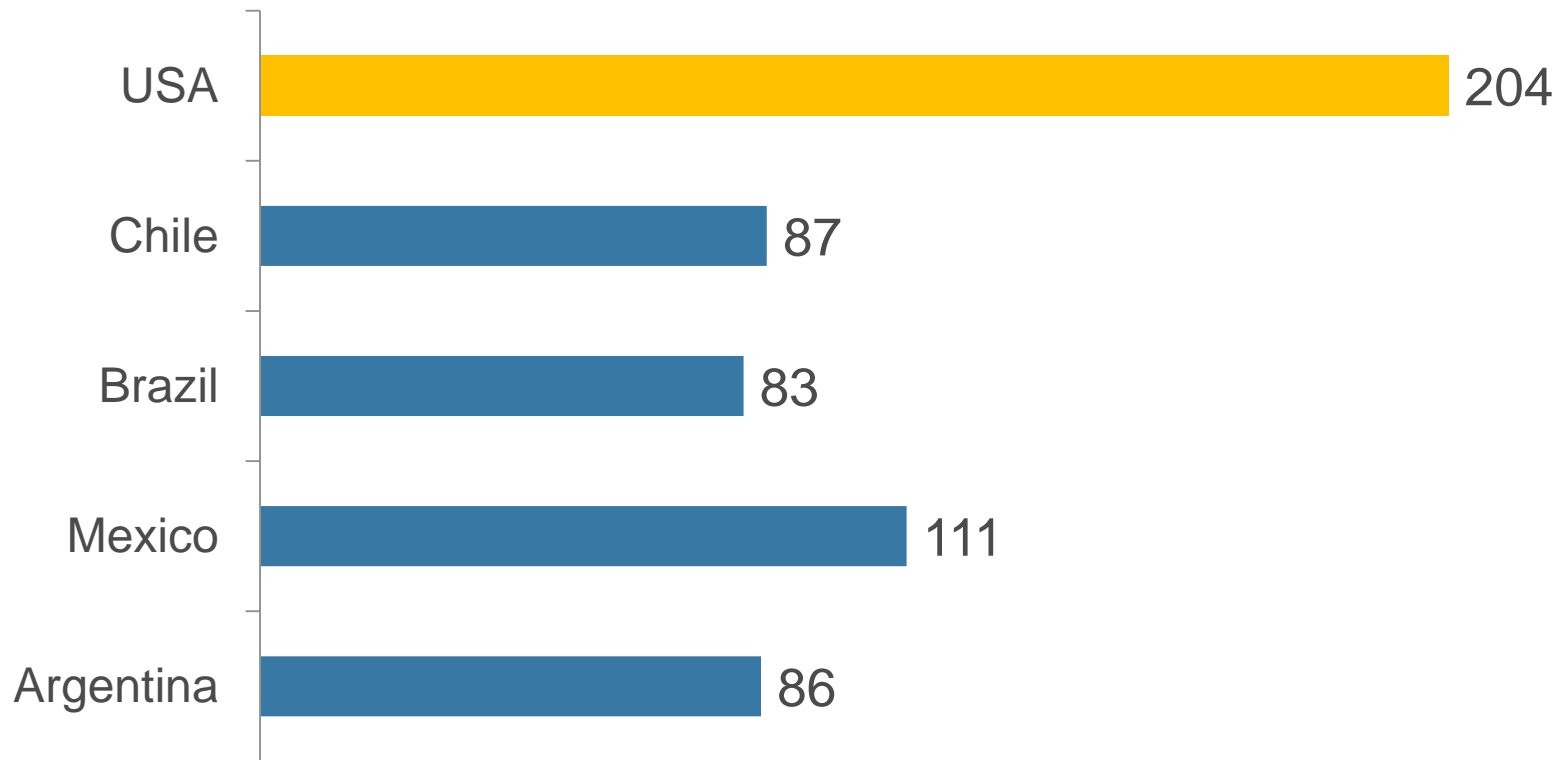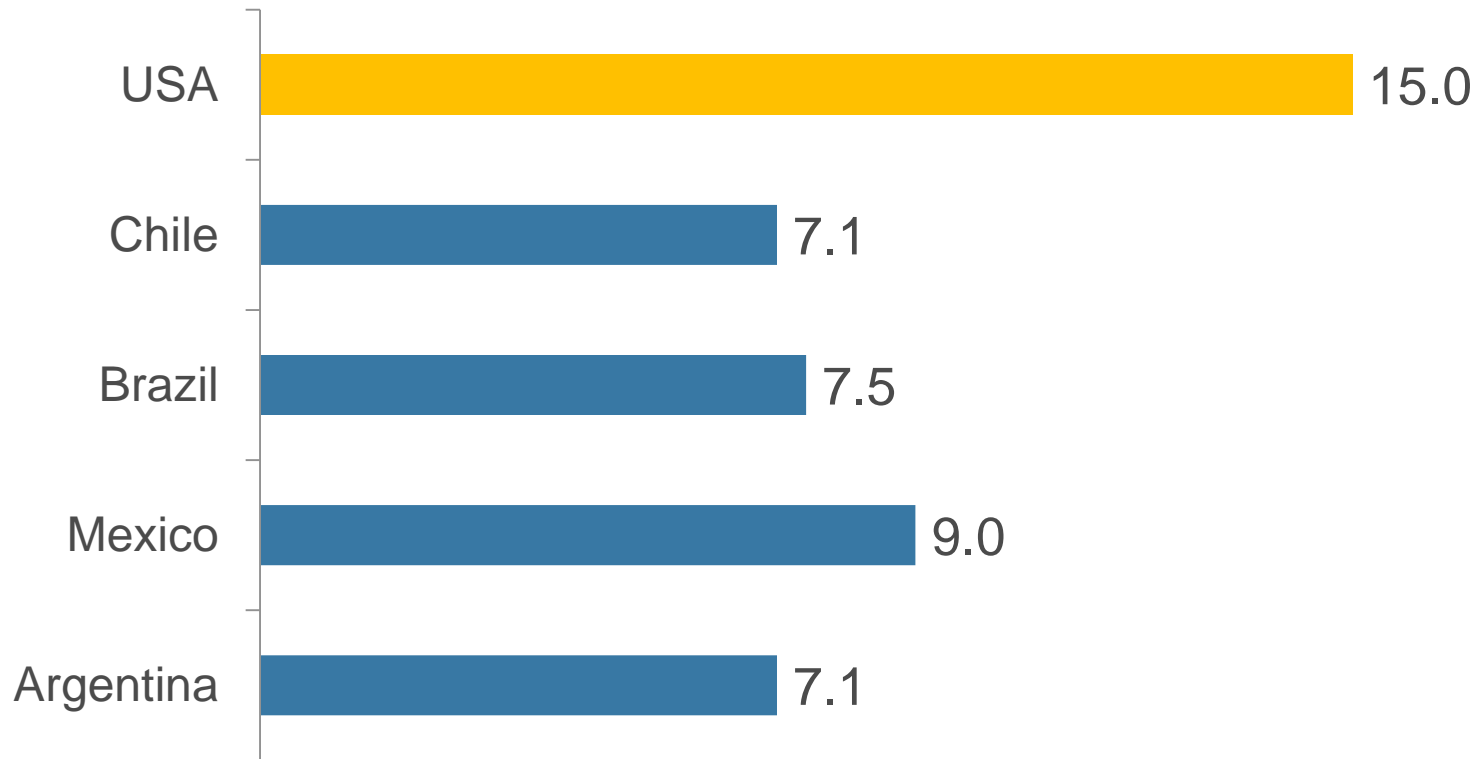
Compared to US data from October 2008, the gap reverses

Hours per Viewer

- USA: 4.6
- Chile: 7.1
- Brazil: 7.5
- Mexico: 9.0
- Argentina: 7.1
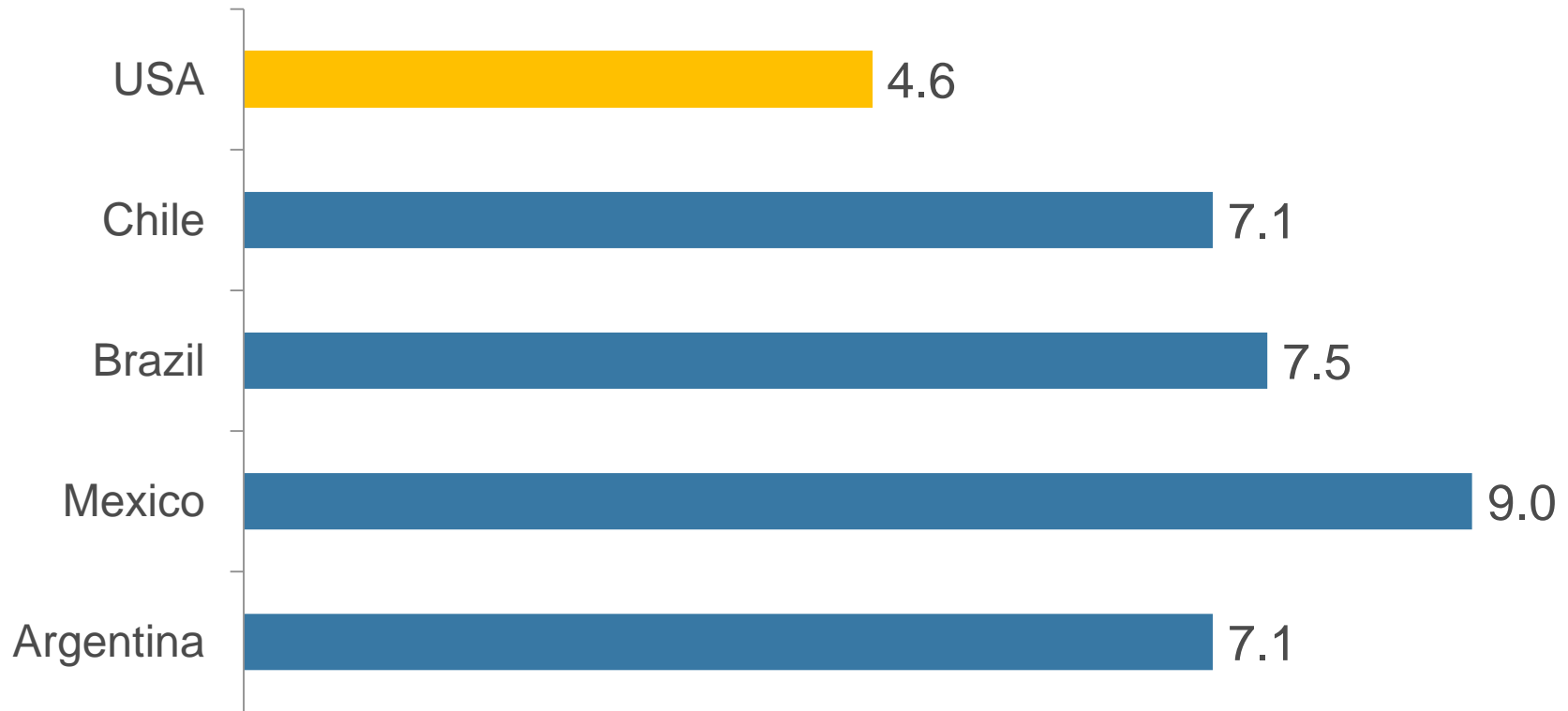
Each month, online video in Brazil accounts for:

35.9MM Unique Viewers

82% Percent of 15+ Internet Audience

2.9B Total Videos

272MM Total Hours

83 Videos per Viewer

7.5 Hours per Viewer

Argentina:

10.9MM Unique Viewers

85% Percent of 15+ Internet Audience

948MM Total Videos

78MM Total Hours

86 Videos per Viewer

7.1 Hours per Viewer

Chile:

6.2MM Unique Viewers

85% Percent of 15+ Internet Audience

536MM Total Videos

44MM Total Hours

87 Videos per Viewer

7.1 Hours per Viewer

Mexico:

16.7MM Unique Viewers

83% Percent of 15+ Internet Audience

1.8B Total Videos

150MM Total Hours

111 Videos per Viewer

9 Hours per Viewer

comScore.

comScore Video Metrix

- **Understanding the Latin American viewer**

- **Audience measures for Argentina, Brazil, Chile, and Mexico**

- ## Where did all this great data come from?

comScore Leverages Rich Panel Data to Deliver Unique and Broad Digital Business Analytics
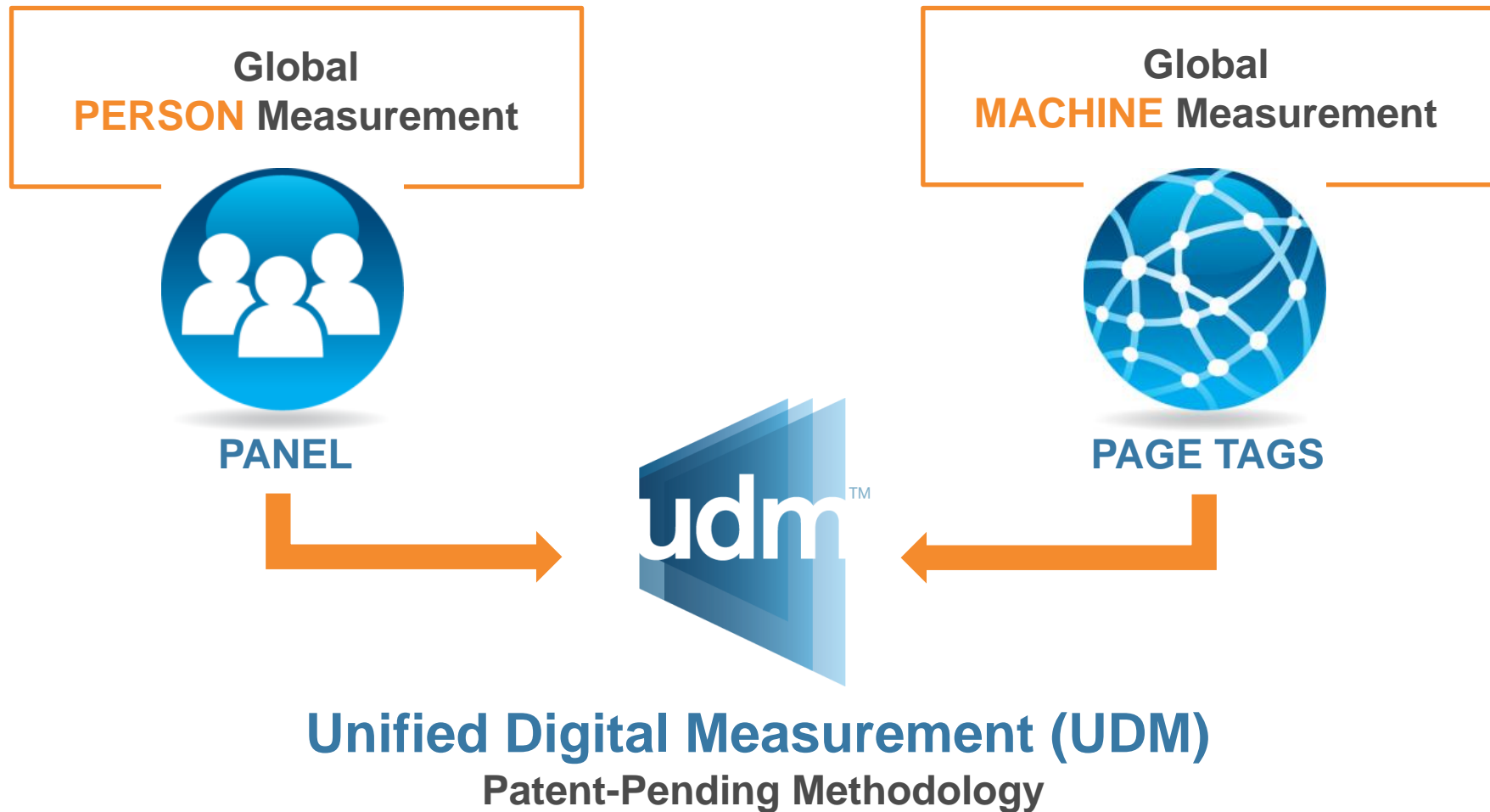
2 Million Person Panel
360° View of Person Behavior

The Only Global Measurement of Audience and E-commerce

170+ Countries Under Measurement
43 Markets Reported

V0910

Unified Digital Measurement™ (UDM) Establishes Platform For Panel + Census Data Integration

Global PERSON Measurement

Global MACHINE Measurement

PANEL

PAGE TAGS

udm™

Unified Digital Measurement (UDM)
Patent-Pending Methodology

Adopted by 88% of Top U.S. Media Properties

comSCORE.

V0910

What does Video Metrix measure?

All data was from October 2010! Except where noted.

Answer the questions:

- Who's watching?

- How long are they watching?

- Does viewing behavior change for different types of content?

Video Metrix uses the same UDM methodology and panel as Media Metrix 360

Thank you!

Andres Palmiter
apalmiter@comscore.com