Online Video Forecasts

2019

Zenith
The ROI agency



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Zenith is The ROI agency. We blend data, technology and brilliant specialists to scout out new opportunities, solve complex challenges and grow our client's businesses. Zenith is part of Publicis Media, one of four solution hubs within Publicis Groupe, and has offices within Publicis One. We have over 6,000 brilliant specialists across 95 markets. We are experts in communications & media planning, content, performance marketing, value optimisation and data analytics. Zenith works with some of the world's leading brands including Electrolux, Essity, Kering, Lactalis, Luxottica, Nestlé, Nomad Foods, Oracle, Perrigo and RB.

Online Video Forecasts 2019

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Welcome to the fifth edition of Zenith's annual *Online Video Forecasts* report.

Welcome to the fifth edition of Zenith's annual *Online Video Forecasts* report. This report contains historical data and forecasts of online video consumption and advertising, together with commentaries on the development of individual markets by local experts. This year's edition covers 51 key markets.

This report finds that the average person will spend 100 minutes each day watching online video in 2021, up from 84 minutes this year. That's the equivalent of watching 25 continuous days of video in 2021.

The amount of time people spend viewing online video has grown rapidly across the world, at an average rate of 32% a year between 2013 and 2018, boosted by improvements in display sizes and quality of mobile devices, faster mobile data connections, and the spread of connected TV sets.

China and Sweden have the keenest online video viewers, with the average person in each country expected to spend 103 minutes a day watching online video this year. These are the only countries where online video viewing exceeds 100 minutes a day, but by 2021, Zenith expects Canada, India, Mexico, the UK and the USA to join the list.

Online video adspend will be worth a third of the TV ad market in 2021

Zenith forecasts that advertising expenditure on online video will rise from US$45bn this year to US$61bn by 2021, at an average rate of 18% a year, compared to 10% a year for internet advertising as a whole. Meanwhile television adspend will shrink from US$183bn to US$180bn over the same period, as ratings continue to drop in key markets. Online video will therefore rise to the equivalent of a third of the entire TV market in 2021, up from a quarter this year.

From in-stream to out-stream video, and beyond

Video inventory is in high demand, and to meet the need, publishers have supplemented video ads that appear before, during or after video content with in-stream ads – video ads that pop up beside other content, such as text, images or social media posts – and out-stream or 'in-read' ads. Out-stream ads are now common and, in some markets, comprise the majority of video advertising: in the UK, 57% of video adspend went to out-stream advertising in 2018. The balance may soon start to shift back towards in-stream advertising, though, as social platforms invest in their mobile TV products, such as Snapchat's Shows.

Brands need to make clear distinctions between the way they use in-stream and out-stream ads. In-stream ads reach consumers who are actively seeking to view video, and are leaning forward to pay attention to it. The quality of the video in which an ad is embedded plays a big role in determining how the viewer engages with and responds to the ad. Brands therefore need to ensure that their in-stream ads appear in content that supports their values.

Out-stream ads reach consumers who are primarily interested in the content that the ads sit alongside, and who can quickly and easily scroll past them. These ads are commonly viewed with the sound off. Out-stream ads need to grab and hold attention with speed and interesting content that can be understood quickly and easily and, most crucially, add value through relevance – both for the audience and the business objective. Out-stream ads are difficult to evaluate using traditional viewability metrics, against which most will perform poorly; instead they should be judged on business metrics such as incremental brand or sales impact.

Looking beyond in-stream and out-stream, social platforms like Facebook and Snapchat are making Augmented Reality (AR) accessible to both consumers and brands through their AR video ads.

Types of online video advertising

There are several types of advertising available within and around online video.

Linear video ads: A linear video ad is experienced in-stream, and is presented before, between, or after the video content is consumed by the user. One of the key characteristics of linear video ads is the ad takes over the full view of the video.

Pre-roll - A linear video spot that appears before the video content plays.
Mid-roll - A linear video spot that appears in the middle of the video content.
Post-roll - A linear video spot that appears after the video content completes.

Non-linear video ads: A non-linear video ad product runs parallel to the video content so the user still has the option of viewing the content. Common non-linear ad products include overlays, which are shown directly over the content video itself, and product placements, which are ads placed within the video content itself. Non-linear video ads can be delivered as text, graphical banners or buttons, or as video overlays.

In-stream video: A video ad either viewed within or around video content from a video player.

Out-stream video: A video ad that is placed separately from other video content, elsewhere on the page or within written content.

In-banner video: A video ad displayed or triggered within a display banner.

In-text video: A relevant video ad displayed only when a user chooses to mouse-over a highlighted word or phrase within the text of web content.

Skins: The ads that are placed around the perimeter of the video.

Summary tables

Worldwide summary

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	169,894	89,487	37,744	7,603	741
2013	175,389	106,801	46,556	9,992	1,554
2014	180,776	130,890	59,373	13,450	2,847
2015	180,371	157,184	75,267	17,453	5,039
2016	183,513	187,143	92,489	24,016	9,212
2017	183,271	223,702	114,076	30,546	14,895
2018	184,441	261,230	139,952	37,155	24,418
2019	182,681	291,853	160,142	44,623	30,399
2020	181,447	321,235	179,550	52,090	36,696
2021	180,101	350,371	200,946	61,338	44,705

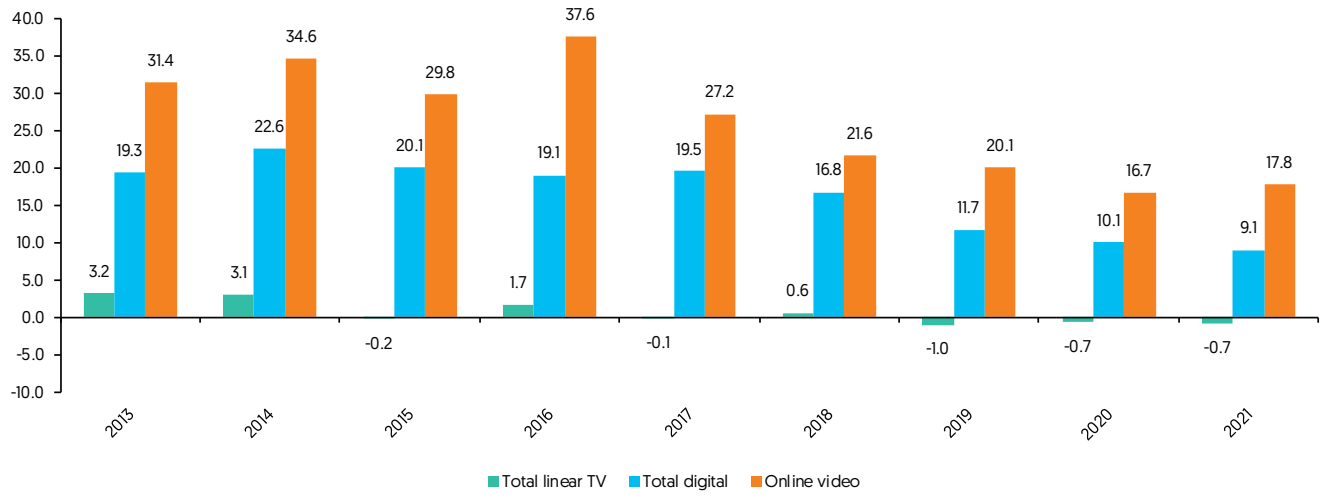
Source: Zenith

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	13.1	17.4	23.1	28.9	45.3	56.5	69.4	84.3	94.5	99.8
Time spent watching online video on mobile devices	4.1	5.4	9.8	11.4	24.5	32.4	42.3	52.9	60.4	64.6
Time spent watching online video on desktop/non-mobile	9.0	12.0	13.3	17.5	20.9	24.2	27.1	31.3	34.0	35.3

Source: Zenith

Advertising expenditure year-on-year growth (%)



Source: Zenith

Country entries

Argentina

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	19,820	20,536	20,329	20,532	20,167	20,110	19,730	19,573	19,425	19,211
Number of regular connected TV viewers (000s)**	-	-	556	1,485	1,772	4,584	8,124	10,559	13,581	17,542
Number of regular online video viewers (000s)*	-	-	5,974	8,099	10,240	14,027	17,051	22,162	28,504	36,818

Source: TGI January - December 2018 (Kantar Ibope Media)/Zenith estimates
**weekly ** monthly*

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	-	5.0	12.0	14.8	18.3	22.6	27.9
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: TGI January - December 2018 (Kantar Ibope Media)/Zenith estimates

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	21,860	17,051
Gender (000s)		
Male	10,539	8,039
Female	11,321	9,012
Age (000s)		
under 16	1,500	1,216
16-24	4,787	4,241
25-34	4,560	3,887
35-44	3,637	3,023
45-54	3,067	2,372
55-64	2,526	1,571
65+	1,785	742
Socioeconomic status		
High	4,601	3,973
Medium	6,710	5,468
Low	10,549	7,610

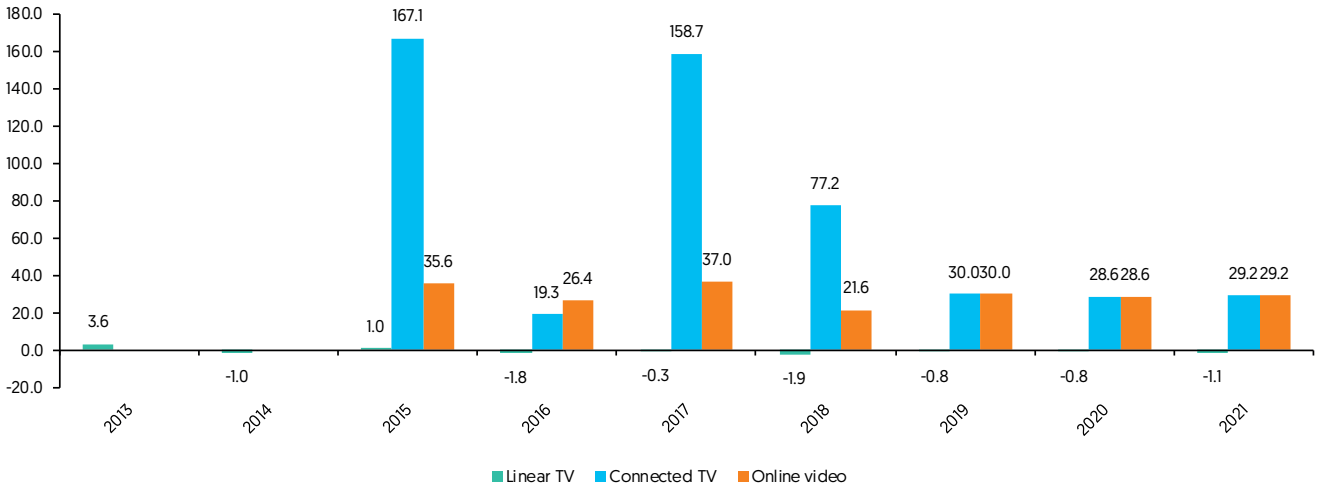
Source: TGI January - December 2018 (Kantar Ibope Media)

YouTube is the main video platform in Argentina, followed by Netflix, Twitch, Dailymotion and Vimeo. All apart from Netflix skew male for their viewership, Twitch massively so, 71.7% of its users being male. Viewers generally visit YouTube, Dailymotion and Vimeo for short-form videos and Netflix for long-form, Twitch serving up both.

YouTube and Dailymotion sell banners and in-stream ads, while Netflix and Vimeo are ad free. Twitch uses both banners and video ads. The key performance indicators are generally the number of completed videos and engagement with the content. In-stream and in-read are the preferred formats in Argentina.

It is becoming more common to plan and buy television and online video at the same time, with common objectives, in order to maximise efficiency.

Regular viewer numbers year-on-year growth (%)



Source: TGI January - December 2018 (Kantar Ibope Media)/Zenith estimates
**weekly ** monthly*

Armenia

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	8.0	10.0	14.0	26.0	41.0	55.0	65.0	69.0	76.0	81.0
Time spent watching online video on mobile devices	5.0	6.0	9.0	13.5	27.0	36.0	44.0	47.0	51.0	54.0
Time spent watching online video on desktop/non-mobile	3.0	4.0	5.0	12.5	14.0	19.0	21.0	22.0	25.0	27.0

Source: Zenith

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	20.0	27.0	40.0	45.0	50.0	54.0	60.0	60.0	65.0	68.0
Average proportion of online video ads that are fraudulent	-	-	-	-	-	-	-	-	-	-

Source: Zenith

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	2,973	1,896
Gender (000s)		
Male	1,408	996
Female	1,565	900
Age (000s)		
under 15	600	190
15-24	361	284
25-54	1,278	1,138
55-64	389	228
65+	345	57

Source: armstat.am, adwords.google.com, Facebook Ads Manager, countrymeters.info

The main video platforms in Armenia are YouTube and Vimeo, which are mostly used by young people aged 18-30 years old. Short form content is most popular.

Small companies are mostly using online video, because it is cheaper and more effective. In terms of different ad formats, pre-roll and in stream video ads are the most effective.

The consumption of mobile video is producing high results and engagement, and is important for brand awareness as well. In the future, audio-visual advertising will be the most effective, persuasive way to talk to and connect with consumers.

Australia

Advertising expenditure (AUD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	3,891.1	3,342.6	876.1	90.0	-
2013	3,997.6	3,986.5	1,125.0	156.0	-
2014	3,928.5	4,798.4	1,453.1	276.0	-
2015	3,906.1	6,014.5	2,120.3	484.0	-
2016	3,797.4	7,396.9	2,687.0	766.0	-
2017	3,720.7	8,351.1	3,282.6	1,089.6	-
2018	3,627.4	9,362.5	3,824.3	1,374.7	-
2019	3,597.0	10,054.6	4,206.7	1,860.1	-
2020	3,607.6	10,440.4	4,417.1	2,244.7	-
2021	3,612.0	10,797.8	4,593.7	2,569.9	-

Source: CEASA, IAB, Zenith; total digital includes classified and search

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	2,911.1	2,500.7	655.4	67.3	-
2013	2,990.8	2,982.5	841.7	116.7	-
2014	2,939.1	3,589.9	1,087.1	206.5	-
2015	2,922.3	4,499.7	1,586.3	362.1	-
2016	2,841.0	5,534.0	2,010.3	573.1	-
2017	2,783.6	6,247.8	2,455.9	815.2	-
2018	2,713.8	7,004.5	2,861.1	1,028.5	-
2019	2,691.1	7,522.3	3,147.2	1,391.6	-
2020	2,699.0	7,810.9	3,304.6	1,679.4	-
2021	2,702.3	8,078.3	3,436.8	1,922.6	-

Source: CEASA, IAB, Zenith; total digital includes classified and search

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	-	-	-	57.6	58.5	59.0	60.0
Average proportion of online video ads that are fraudulent	-	-	-	-	-	-	-	-	-	-

Source: IAB Viewability Industry benchmarks

Demographics

	General population	Online video viewers
	Q3 2018	2019
Total (000s)	25,102	16,050
Gender (000s)		
Male	12,450	7,806
Female	12,652	8,244
Age (000s)		
under 16	4,987	-
16-24	3,056	2,163*
25-34	4,029	3,486
35-44	3,451	2,950
45-54	3,210	2,847
55-64	2,735	2,396
65+	3,634	2,208
Socioeconomic status		
OG1 (previously AB)	10,292	-
OG2 (previously C1)	9,790	-
OG3-5 (previously C2DE)	5,020	-

Source: ABS, NIELSEN DIGITAL PANEL
**18-24*

As linear TV revenues continue to decline, digital advertising in general – and online video in particular – will experience further growth. Digital ad revenues grew a staggering 12% year-on-year in 2018, but we expect more muted growth this year and in subsequent years.

Consumer confidence is volatile, jumping from a 19-month low of 98.8 in March to 101.3 in May. The unexpected result of the Federal Election on May 18, which saw the Liberal-led Coalition retain power, is a clear sign of the public's concern with the economy over social and environmental policy. We may see consumer confidence pick up in the wake of the result, though the economy remains in a challenging position.

As Australia steels itself for recession, we believe a squeeze on marketing budgets is inevitable. That said, this squeeze is likely to have a disproportionate impact on TV and thus we still foresee double-digit growth for OLV (also in recognition of the lower base).

As is the case in many other markets, the largest video platform in Australia is YouTube. According to the Standard Media Index, an incomplete but representative view of the market, 66% of video ad dollars were spent on the platform in 2018. YouTube also dominates in terms of unique audience, generating 49% reach among the 18+ population in February 2019 (Nielsen Streaming Report). Of top-ranking sites, YouTube rates highest in terms of time spent (25 hours 39 minutes in February 2019).

Subscription OTT services also continue to enjoy heavy uptake and continued growth. According to Roy Morgan estimates, Netflix had grown a further 25% by February 2019. Local SVOD provider, Stan, also witnessed double-digit growth last year, though it will be interesting to see the extent to which the still-recent launch of Amazon Prime and the upcoming launch of Disney+ will have an impact on the growth trajectory of the incumbent leaders.

According to Nielsen, the demographic breakdown of online video viewers reflects the Australian population at large. It is slightly younger-skewing, with 14% of viewers in the over-65 age bracket vs.18% nationwide.

Data regarding the type of content viewed online is patchy, but there is evidence to suggest that time spent watching long-form BVOD 'catch-up' is growing rapidly. According to the IAB, BVOD viewing was up 76% in 2018.

Content consumption varies significantly by device and by age. According to the Deloitte Mobile Consumer Survey 2018 (Australian cut), 44% of 18-24 year-olds and 51% of 25-34s prefer to watch short videos via their mobile phones, while only 12% and 9% respectively watched films or videos via this device. Given that half of OLV is viewed via smartphone and in the light of YouTube's dominance in the market, we can assume short-form is the most commonly viewed type of content.

For relaxation at the end of the day and for appointment-to-view content, most respondents use CTVs to watch TV shows or movies. According to ThinkTV's Benchmark Series, screen coverage is highly correlated to attention and sales. As such, the effectiveness of ad formats harnessing the power of a full screen is likely to be higher for brand messaging. Likewise, vertical videos and short form ad formats tend to work the best at driving attention and recall.

In a more spontaneous mindset whereby an individual gets pulled into watching content or is engaged in sharing or viewing viral content, the majority are doing so via smartphone. For simple message advertising where the content can be conveyed in a few seconds, these pre-roll formats (even if skippable) can also prove effective.

The IAB's video viewability benchmark, which includes data from Comscore, IAS and MOAT, was 58% from October 2017 – April 2018. This varied significantly depending on whether the buy was direct (71.5%) or programmatic (48.2%). IAS's H2 2018 numbers do however imply viewability is much higher: 73% on desktop and 64% on mobile. In any case, we expect viewability will continue to be a focal point for advertisers in the future, and will therefore experience gradual growth over time.

What may begin to come under greater scrutiny is the viewability standard. From the IAS data, it is very clear that while viewability at the >1s standard may be sitting at over 50%, it dramatically declines as the standard rises. According to this data, 48% of ads were viewable at a >5s standard, while only 30% were viewable at a >15s standard.

In terms of ad fraud, there is a great deal of varying opinion on its proliferation. While a 2019 Pixalate report claimed overall ad fraud in Australia was 20%, the IAB has claimed it is less than 4%. The aforementioned IAS study put desktop video ad fraud at 1.3% and mobile ad fraud at 0.6%. It is therefore difficult to say with any certainty what its impact is in Australia.

Again, data around brand risk and safety is a little sparse. The same IAS study reported H2 2018 brand risk at 5.1% for desktop, with most risk coming for illegal drug and violent content. For mobile video the number is higher, at 8.7%, driven by offensive language and controversial news and violence. Brand safety is certainly a key focus for advertisers in Australia, and we are likely to see these numbers come under increased scrutiny over time.

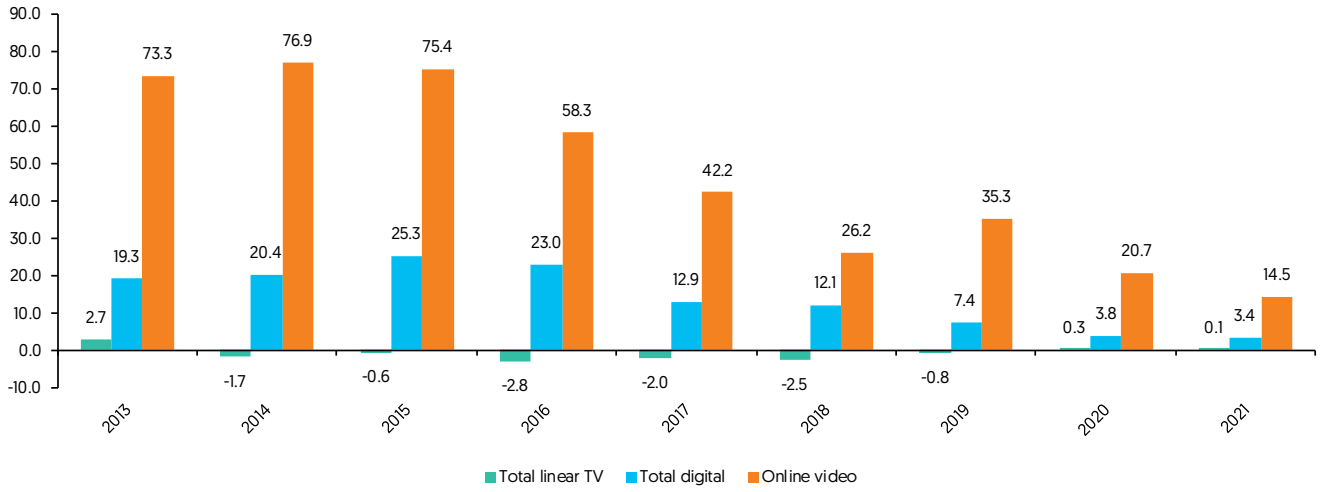
Digital is certainly the future of AV advertising in Australia – how rapidly this future emerges is up for debate. According to many, the biggest stumbling-block is measurement. In the IAB Australia Future of Measurement Survey (March 2019), cross-media measurement systems, measurement keeping pace with consumer behaviour, and the development of CTV measurement were the top three challenges advertisers identified. So while the technology may be developing fairly rapidly, the inability to quantify its impact on more traditional advertising routes is preventing OLV from replacing linear TV ad dollars altogether.

The introduction of Virtual Australia (VOZ) later this year should go some way towards remedying this. As an independent, single measurement solution, the entire industry is waiting on this development to help determine incremental reach from viewing on connected devices. At the moment, the solution is only geared towards measuring the effect of broadcaster VOD on linear TV reach, so will not take into account reach on YouTube, etc.

We expect to see growth in owned content being distributed in IGTV and Facebook Watch, to compete with YouTube (evidenced by increasing broadcast rights as a new distribution channel, i.e. AFL/NRL deal).

Online video viewing via smartphone is approximately 49%, according to Nielsen. We expect this to grow, though not necessarily in a dramatic way. Growth will occur as the population ages and the habits of younger age groups, more prone to watch digital video via smartphone (58% of time spent for 18-24s), become predominant. At the same time, growth may well be tempered by the penetration of smart TVs, which allow viewers to watch all forms of content, whether short- or long-form, via the TV screen.

Advertising expenditure year-on-year growth (%)



Source: CEASA, IAB, Zenith; total digital includes classified and search

Austria

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	352.4	225.3	142.0	11.0	1.1
2013	370.0	263.0	163.0	13.9	2.0
2014	378.1	307.6	182.6	17.8	5.4
2015	383.8	348.2	204.5	22.9	7.0
2016	397.2	388.0	227.0	28.0	9.0
2017	409.2	421.0	251.9	37.8	13.6
2018	417.3	450.0	270.8	48.7	18.5
2019	421.5	474.3	284.4	56.9	22.2
2020	427.8	497.5	297.2	62.4	25.0
2021	436.4	521.9	310.5	68.3	27.3

Source: Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	416.3	266.2	167.8	13.1	1.3
2013	437.1	310.7	192.6	16.4	2.3
2014	446.8	363.4	215.7	21.0	6.4
2015	453.5	411.4	241.6	27.1	8.3
2016	469.3	458.4	268.1	33.1	10.6
2017	483.4	497.4	297.6	44.6	16.1
2018	493.1	531.7	320.0	57.6	21.9
2019	498.0	560.4	336.0	67.2	26.2
2020	505.5	587.8	351.1	73.7	29.5
2021	515.6	616.6	366.9	80.7	32.3

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	-	3,976	3,382	3,703	3,864	3,676	3,378	3,209	3,048	2,896
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)**	3,283	3,413	3,631	3,946	4,243	4,538	4,885	5,227	5,593	5,928

Source: AGTT/GfK: TELETEST, Evogenius (12+), Media-Analyse (14+)
** daily ** monthly*

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	21.2	23.3	24.0	30.0	32.0	36.0	41.4	47.6
Time spent watching online video on mobile devices	-	-	-	-	5.0	8.0	8.0	9.0	10.8	13.0
Time spent watching online video on desktop/non-mobile	-	-	-	-	19.0	22.0	24.0	27.0	30.6	34.6

Source: AGTT Bewegtbildstudie 2016-2019, Zenith estimates

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	7,473	4,885
Gender (000s)		
Male	3,654	2,586
Female	3,819	2,299
Age (000s)		
under 16	146	135
16-24	953	879
25-34	1,112	973
35-44	1,146	926
45-54	1,415	923
55-64	1,146	578
65+	1,554	470
Socioeconomic status		
AB	2,242	1,656
C1C2	2,989	1,992
DE	2,242	1,236

Source: Media-Analyse 2018; 14+

All kinds of content are available, but mostly short-form and catch-up-TV.

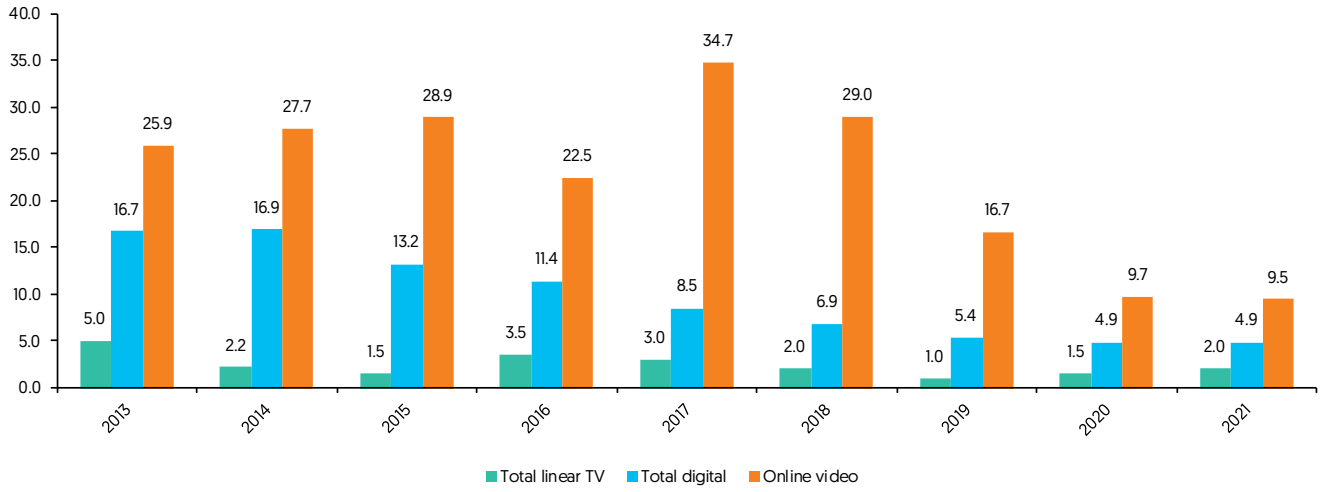
In terms of demographics, there is still a slight emphasis on male viewers aged under 45. Nevertheless, OLV is becoming a very broad media channel with consumers in all age categories. Mobile video is becoming ever more important, especially for young audiences.

The main platforms to book advertising on are broadcaster platforms, YouTube, Facebook and Teads. Most online video ads are pre-rolls; mid-rolls and post-rolls are also used. All in-stream ads have high click-through rates, but poor conversion rates after the click, so they are mainly used for awareness campaigns.

Because television is quite cheap in Austria, and in-stream ads are expensive (except on YouTube, or when bought programmatically), online video is only effective as a replacement for television for very young audiences or when using special strategies. One such strategy is to buy online video in real time, based on the previous day's TV ratings data. If a particular audience was underweight on yesterday's television, we can target it online today.

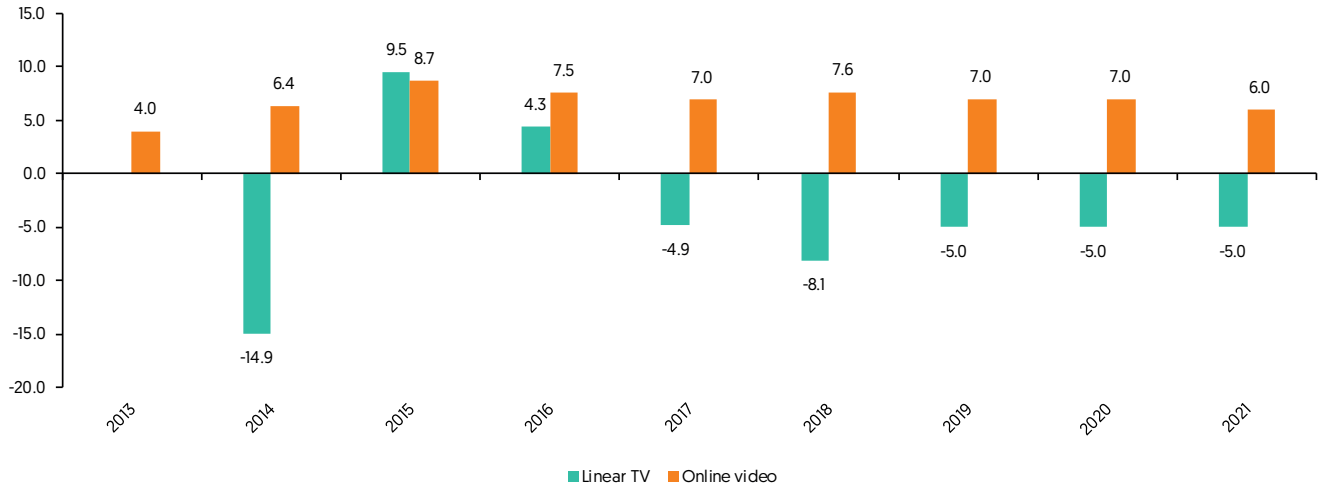
The fixed cost of video production is high, and Austria is a small market, so advertisers rarely produce owned video content for Austria, but international videos are often available on their YouTube channels.

Advertising expenditure year-on-year growth (%)



Source: Zenith

Regular viewer numbers year-on-year growth (%)



Source: AGTT/GfK: TELETEST, Evogenius (12+), Media-Analyse (14+)
** daily ** monthly*

Belarus

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	43.0	10.2	7.2	-	-
2013	59.6	15.5	10.6	0.3	0.1
2014	62.4	19.9	12.9	0.6	0.2
2015	44.8	16.9	10.7	1.1	0.5
2016	47.2	20.2	12.9	2.3	1.2
2017	57.1	25.3	15.3	3.2	1.5
2018	65.7	30.1	17.7	3.7	2.2
2019	73.6	32.8	19.2	4.4	2.6
2020	82.4	36.0	20.8	5.3	3.2
2021	90.6	39.4	22.6	5.8	3.4

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	9,403	9,308	9,213	9,118	9,023	8,928	8,833	8,738	8,643	8,324
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	-	-	3,240	-	3,988	-	-	-	-

Source: Gevs, Realnie izmerenia, Gemius Monthly

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	28.9	30.7	34.1	37.3	44.4	67.0	79.0	94.0	111.0
Time spent watching online video on mobile devices	-	4.6	9.2	15.0	20.5	27.3	34.0	36.0	41.0	58.0
Time spent watching online video on desktop/non-mobile	-	24.3	21.5	19.1	16.8	17.1	33.0	43.0	53.0	53.0

Source: marketing.by

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	-	-	-	50.0	66.8	76.0	78.0
Average proportion of online video ads that are fraudulent	-	-	-	-	-	-	-	-	-	-

Source: Zenith estimates

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	9,492	4,895
Gender (000s)		
Male	4,422	-
Female	5,070	-
Age (000s)		
under 16	1,684	332
16-24	878	1,014
25-34	1,495	1,326
35-44	1,355	819
45-54	1,299	468
55-64	1,363	585
65+	1,420	351

Source: Belstat, marketing.by, Zenith estimates

Online video is one of the fastest growing digital advertising segments. Online video advertising coverage is 30% to 40% cheaper than TV video coverage.

There are many online video platforms in Belarus, the most popular of which is YouTube. On average, users spend about 8 minutes 47 seconds per day watching online video, with the average number of unique page views per user at 5.07. Also gaining popularity is TikTok. The platform, which provides a niche service for the publication of mini-clips, attracted the audience of Vine (now closed).

Belarus has several websites, such as Ivi and Megogo, SeasonVar, Videomore, which offer paid subscriptions for the latest films in HD quality. VOKA is an online video service that broadcasts TV channels, films and TV shows, as well as its own content; it is available on any network and mobile device.

Audiences between the ages of 25 and 34 are the main consumers of online video content as they have 24/7 access to the internet.

In Belarus, the effectiveness of advertising in long form content is much higher than in a short user video. The following are indicators of advertising based on the duration of content:

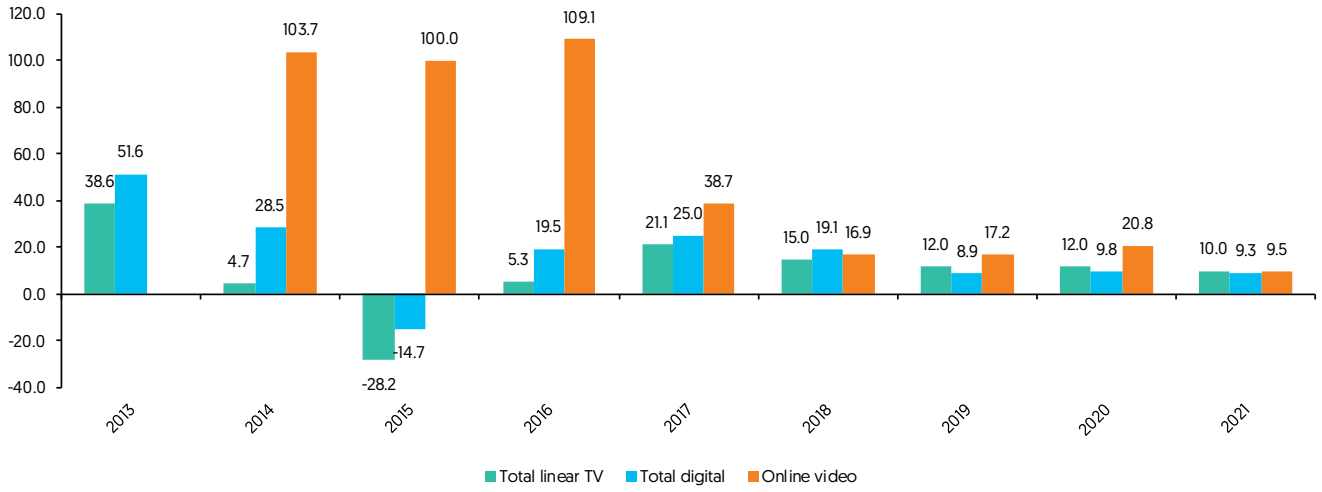
- Rollover memorability - long form 64%; short form 49%
- Brand memorability - long form 50%; short form 32%
- Message memorability - long form 40%; short form 24%
- Positive attitude - long form 28%; short form 20%

There are many video formats available in Belarus: all-roll, pre-roll, mid-roll, pause-roll, post-roll, multi-roll, in-stream/ TrueView in-stream, Оверлей/overlay, wow-roll, interactive, native video seeding, inRead video, mobile native scroller, video discovery, in-page видео, fullscreen, video billboard and 360 video.

Advertisers do not use online video as a substitute for linear TV advertising – instead it is used to complement TV campaigns. Advertising on television does not give an opportunity to get a direct response from the viewer, like a click on video, purchase of goods, etc. Video ads on the internet are the solution to this problem. It is also worth noting that despite television being the leading media in terms of audience reach, most viewers (about 60%) are online at the same time through various devices.

Belarussian advertisers have begun to talk more about brand safety and the quality of surrounding content, as well as the availability of advertising traffic for auditing by independent third parties. This trend contributes not only to the improvement of the ecosystem as a whole, but also to improving the competitiveness of local publishers. Advertisers want a guarantee of visibility (viewability) and a guarantee of coverage for real users, not bots.

Advertising expenditure year-on-year growth (%)



Source: Zenith

Belgium

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	7,157	7,352	7,505	7,504	7,643	7,751	7,481	7,406	7,480	7,450
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	-	-	2,355	3,016	3,458	3,771	4,073	4,318	4,577

Source: Linear TV: CIM, Live+7 (total 4+); Online video: Global Web Index (total 16-64) Daily

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	23.0	27.0	29.0	35.0	42.0	50.0	60.0
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: Global Web Index (16-64)

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	11,376	4,582
Gender (000s)		
Male	5,598	2,428
Female	5,778	2,153
Age (000s)		
under 16*	2,050	145
16-24	1,176	393
25-34	1,468	984
35-44	1,478	1,086
45-54	1,594	964
55-64	1,479	686
65+	2,131	324
Socioeconomic status		
Social group 1-2	2,730	1,112
Social group 3-4	2,844	1,158
Social group 5-6	2,616	1,065
Social group 7-8	2,958	1,204
other	228	42

Source: Stat Bel, CIM 12+, Global Web Index
**OLV 12-16*

In 2018, smartphone ownership surpassed that of laptops for the first time: 84% of Belgians own a smartphone (80% in 2017), while tablet and e-reader ownership decreased.

Belgians spent an average of four hours and 46 minutes daily watching screens in 2018. This breaks down to 71% television (49% live, 19% recorded and 3% in replay), 8.9% short internet video, 5.1% short video on social media, 5.6% downloaded films and series, 2.5% DVD, 7% video on demand, and 0.4% for cinema. Those aged 18-24 spent 30% of their screen time on short online video, with television representing just 45% of their screen consumption, whereas for those in the 35-44 category, TV accounted for 73%.

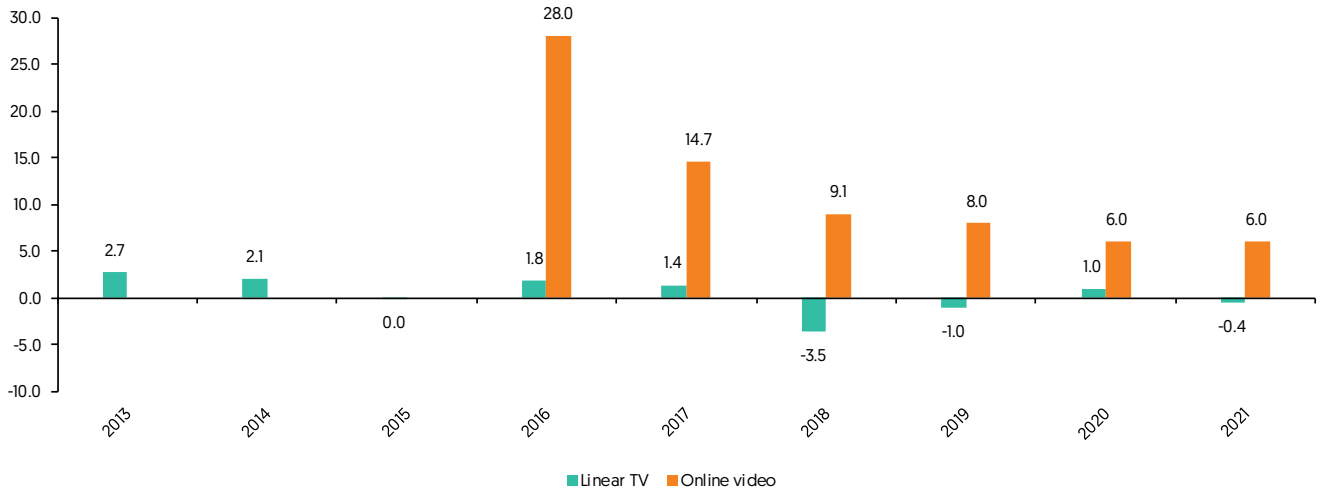
83.3% of online video viewers use their smartphone to watch online video, especially younger people; those over 45 report laptops as their preferred device.

One quarter of the Belgian population has access to video on demand, 23% having a subscription to Netflix. Video streaming is the most widely used subscription service on smartphones. The most popular platform is YouTube, used by 86% of internet users aged 16-64.

Digital adspend figures do not adequately represent the online advertising market in Belgium, because only display expenditure is taken into account. Spend on Google, Facebook and YouTube is not measured. Based on a recent study by IAB Belgium, digital is estimated to account for around 30% of all adspend, and this figure will rise in the years to come.

Following the last issue of the Adex Benchmark 2018 of IAB Europe, video's share of digital display reached 28% of digital investments (the European average is 32.8%), with digital video ad growth of 4.4% (the European average is 30.9%).

Regular viewer numbers year-on-year growth (%)



Source: Linear TV: CIM, Live+7 (total 4+); Online video: Global Web Index (total 16-64) Daily

Bosnia & Herzegovina

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	40.0	1.9	1.5	0.2	-
2013	39.1	2.4	1.9	0.2	-
2014	40.7	3.6	2.9	0.4	-
2015	40.2	3.8	3.0	0.4	-
2016	32.8	3.9	2.2	0.5	-
2017	32.4	4.1	2.3	0.5	-
2018	33.4	4.2	2.3	0.6	-
2019	33.7	4.4	2.4	0.6	-
2020	35.4	4.8	2.8	0.7	-
2021	36.4	5.4	3.1	0.9	-

Source: Marecco Index Bosnia, Ad monitoring, Zenith estimates

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	-	-	-	3,303	3,350	3,350	3,300	3,200	3,100	2,945
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	-	-	350	650	850	1,000	1,200	1,400	1,610

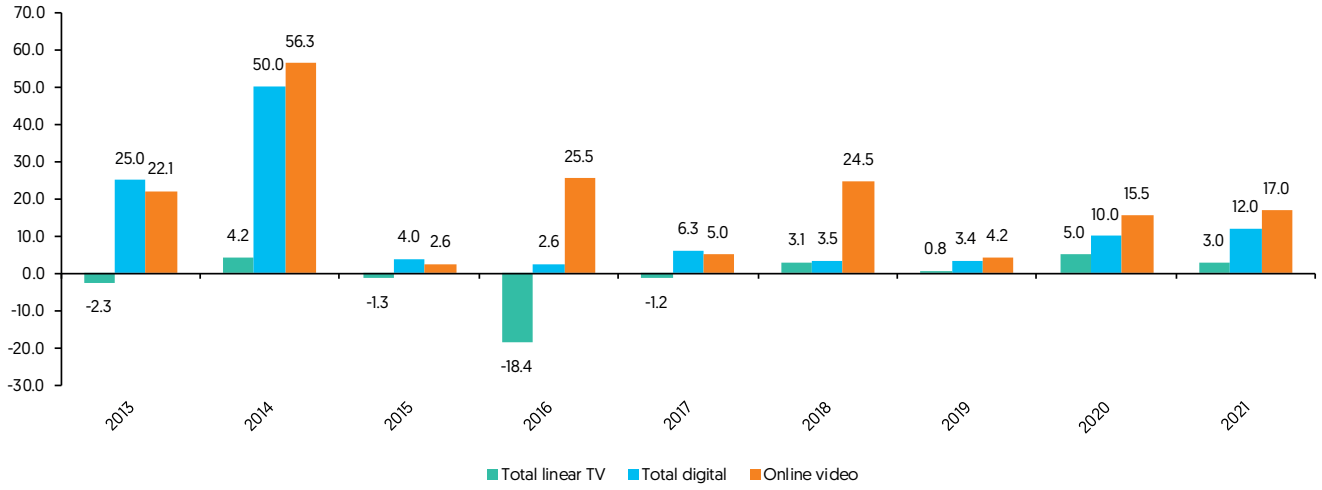
Source: Zenith

The most popular video platform is YouTube, followed by Facebook. Vimeo is only used a little. Most video watched is short-form and mid-length; movie streaming is done, but less so than music video streaming, for example.

Pre-roll ads are the most common video format, and most take the form of reused television ads. Generally, effectiveness has increased since the 'non-skippable' format was introduced. By the end of the year we expect 4G mobile networks to be well established and there should be a considerable expansion of mobile-based online video viewing.

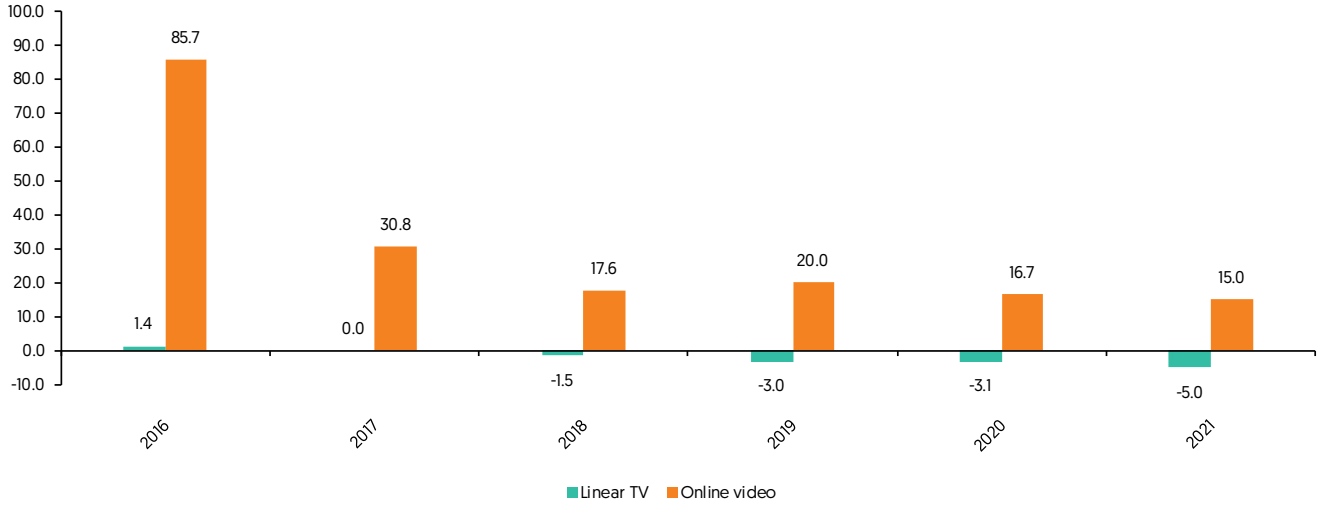
Video bloggers are popular, and there is a lot of scope for brands to create partnerships with them.

Advertising expenditure year-on-year growth (%)



Source: Marecco Index Bosnia, Ad monitoring, Zenith estimates

Regular viewer numbers year-on-year growth (%)



Source: Zenith

Bulgaria

Advertising expenditure (BGN million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	228.3	-	-	-	-
2013	236.5	42.1	29.5	-	-
2014	244.0	50.8	36.4	7.6	-
2015	245.3	69.0	45.0	9.7	-
2016	273.7	91.3	53.9	18.3	-
2017	303.9	91.9	46.9	18.4	-
2018	338.0	98.5	48.3	21.7	-
2019	368.7	105.0	49.8	25.6	-
2020	396.1	112.8	51.2	30.2	-
2021	416.9	120.7	52.7	35.7	-

Source: iAB Forum Bulgaria

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	137.9	-	-	-	-
2013	142.9	25.5	17.8	-	-
2014	147.4	30.7	22.0	4.6	-
2015	148.2	41.7	27.2	5.9	-
2016	165.3	55.2	32.5	11.0	-
2017	183.6	55.5	28.3	11.1	-
2018	204.2	59.5	29.2	13.1	-
2019	222.8	63.4	30.1	15.5	-
2020	239.3	68.1	31.0	18.2	-
2021	251.8	72.9	31.9	21.5	-

Source: iAB Forum Bulgaria

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	5,451	4,994	4,831	4,914	4,912	4,846	4,784	4,740	4,720	4,710
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	-	-	1,557	1,674	2,302	2,486	2,507	2,527	2,547

Source: TV GARB (2012-2013), Nielsen Admosphere (2014-2019); Gemius & Consumer Barometer Daily

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	7,000	3,863
Gender (000s)		
Male	3,430	1,893
Female	3,570	1,970
Age (000s)		
under 16	1,131	30
16-24	497	664
25-34	899	879
35-44	1,034	839
45-54	987	777
55-64	958	534
65+	1,493	139
Location (000s)		
Sofia	1,239	1,191
Big city ~100K	1,162	1,153
Town <100K	2,751	1,098
Villages	1,848	420

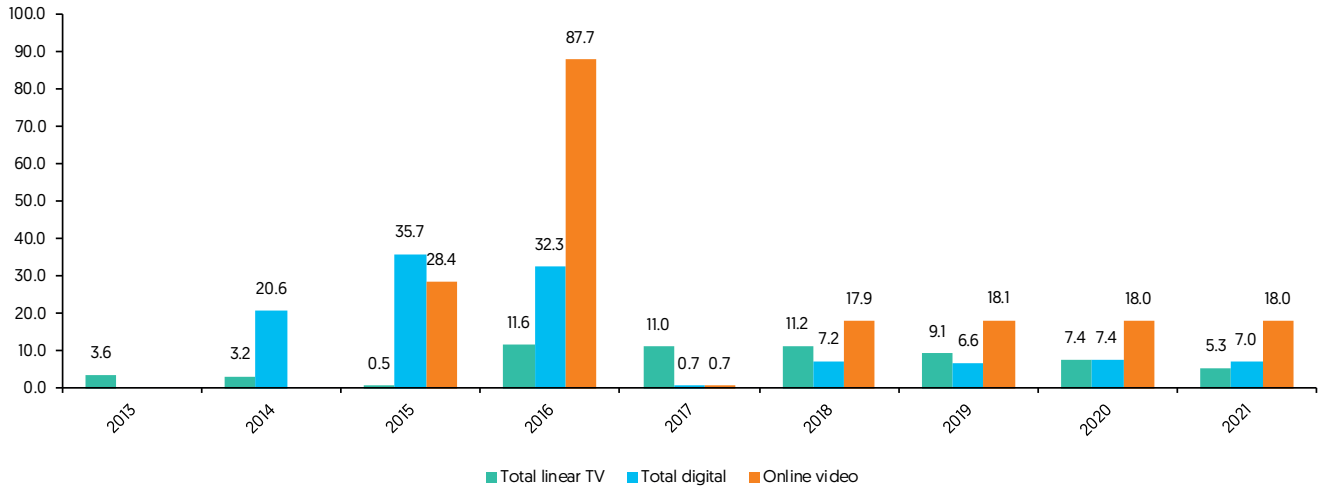
Source: NSI, Gemius, Consumer Barometer

Top websites include YouTube, vbox7.com, Facebook, Instagram and Netflix. The keenest consumers of online video are those in the 13-44 age group, who are also light viewers of TV. Generally, most advertisers use online video to complement TV advertising, as they will already tend to have video resources available for the campaigns.

Pre-roll formats deliver the best results from a media point of view. They usually achieve more than a 35% view rate across YouTube and the local publishers. Instagram Stories have the most impact as they use the whole screen and are a natural fit for mobile screens. Product placement is also gaining popularity, but it has to be much better managed and interwoven into the digital environment. It works very well, though, for increasing awareness and overall brand/product reputation. Companion banners are mainly used for remarketing and performance purposes.

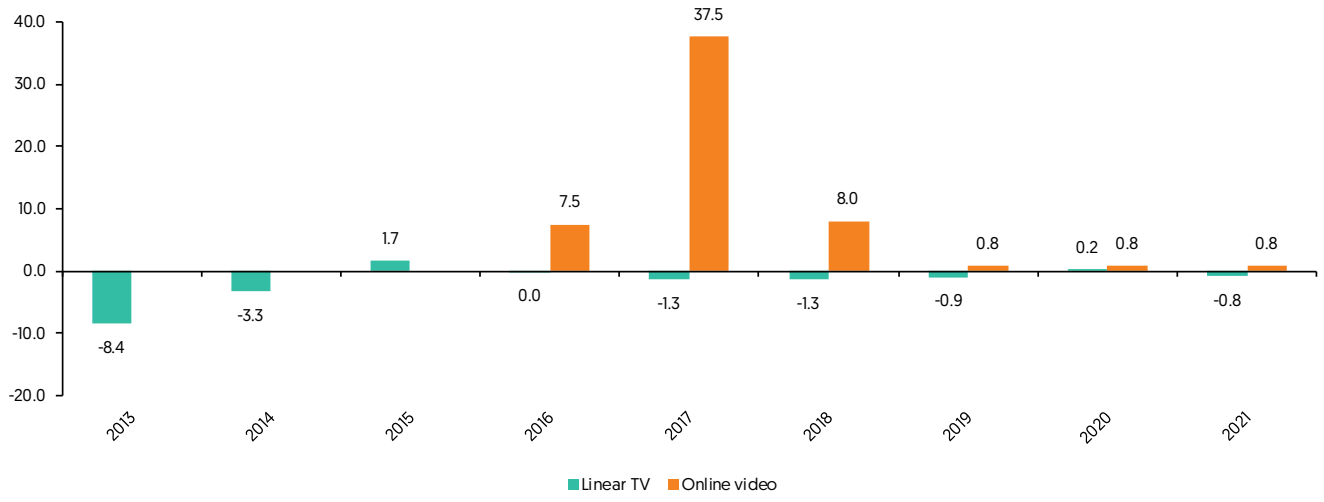
Agency observations show that as users go online they are predominantly accessing the internet on mobile devices, so short-form video viewing is shifting from desktop to mobile, as well. Advertisers and content creators must adapt their content for the mobile environment in order to maximize their viewership, impact and effectiveness in general.

Advertising expenditure year-on-year growth (%)



Source: iAB Forum Bulgaria

Regular viewer numbers year-on-year growth (%)



Source: TV GARB (2012-2013), Nielsen Admosphere (2014-2019); Gemius & Consumer Barometer; daily reach Daily

Canada

Advertising expenditure (CAD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	3,468.6	3,073.0	1,066.0	92.0	36.8
2013	3,386.2	3,408.0	1,299.0	208.0	83.2
2014	3,370.6	3,782.0	1,540.0	266.0	106.4
2015	3,081.1	4,599.0	1,912.0	358.0	143.2
2016	3,166.0	5,485.0	2,392.0	481.0	192.4
2017	3,293.0	6,771.0	3,250.0	928.0	176.0
2018	3,195.0	7,500.0	3,793.0	1,124.0	300.0
2019	3,163.1	7,875.0	4,013.0	1,223.0	600.0
2020	3,131.4	8,347.5	4,289.0	1,341.0	700.0
2021	3,100.1	8,848.4	4,560.0	1,470.0	800.0

Source: Numerator 2018, thinkTV, IAB, Zenith estimates

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	2,676.9	2,371.6	822.7	71.0	28.4
2013	2,613.3	2,630.1	1,002.5	160.5	64.2
2014	2,601.3	2,918.8	1,188.5	205.3	82.1
2015	2,377.8	3,549.3	1,475.6	276.3	110.5
2016	2,443.4	4,233.1	1,846.0	371.2	148.5
2017	2,541.4	5,225.5	2,508.2	716.2	135.8
2018	2,465.7	5,788.1	2,927.3	867.4	231.5
2019	2,441.1	6,077.5	3,097.0	943.9	463.1
2020	2,416.7	6,442.2	3,310.0	1,034.9	540.2
2021	2,392.5	6,828.7	3,519.2	1,134.5	617.4

Source: Numerator 2018, thinkTV, IAB, Zenith estimates

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s) *	5,547	5,531	5,545	5,540	5,411	5,083	4,842	5,014	5,115	5,218
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s) **	23,400	26,000	25,900	26,700	27,500	28,400	29,820	31,311	32,877	34,520

Source: Numeris, ind. 2+, comScore
**Average minute audience over broadcast year **Monthly*

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	52.0	61.0	65.0	70.0	75.0	80.0	88.0	98.0	108.0	118.0
Time spent watching online video on mobile devices	11.0	14.0	17.0	22.0	25.0	30.0	37.0	46.0	55.0	65.0
Time spent watching online video on desktop/non-mobile	41.0	47.0	48.0	48.0	50.0	50.0	51.0	52.0	53.0	53.0

Source: comScore

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	-	39.0	45.0	57.0	65.0	73.0	75.0
Average proportion of online video ads that are fraudulent	-	-	-	-	-	-	2.0	1.5	1.4	1.2

Source: eMarketer, Zenith estimates

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	36,048	29,820
Gender (000s)		
Male	17,950	14,849
Female	18,098	14,971
Age (000s)		
under 16	5,632	4,659
16-24	3,865	3,197
25-34	5,091	4,211
35-44	4,914	4,065
45-54	4,955	4,099
55-64	5,165	4,273
65+	6,425	5,315

Source: Numeris, ind. 2+

Online video expenditure and consumption have been steadily increasing since 2012, with mobile video consumption expected to eclipse desktop video consumption in 2020.

Over 50% of advertising budgets are now digital, of which around 15% goes to online video.

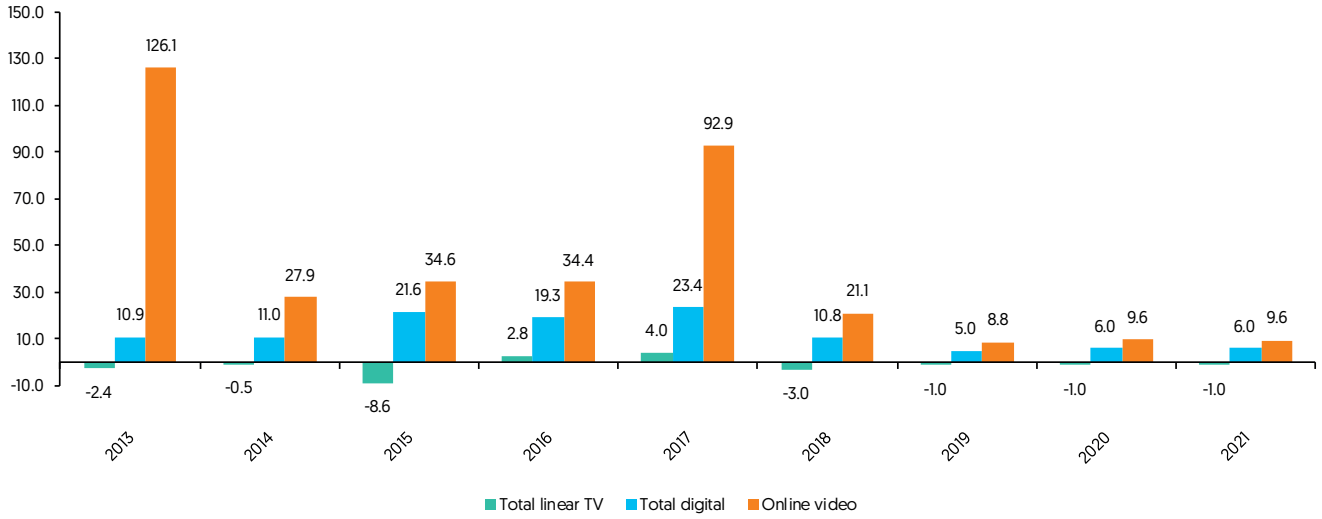
In Canada, online video is often used as an extension of TV to provide incremental reach.

According to the vividata Spring 2019 Survey, 14% of Canadians agreed that they search the internet for the products they see advertised on TV. Canadians are active online video consumers, with 63% having streamed online videos in the past month for an average of 4.7 hours.

YouTube is the biggest online video platform across all categories in the Canadian market, with 25.3% of the total ad revenue share, followed by Facebook with 11.7%.

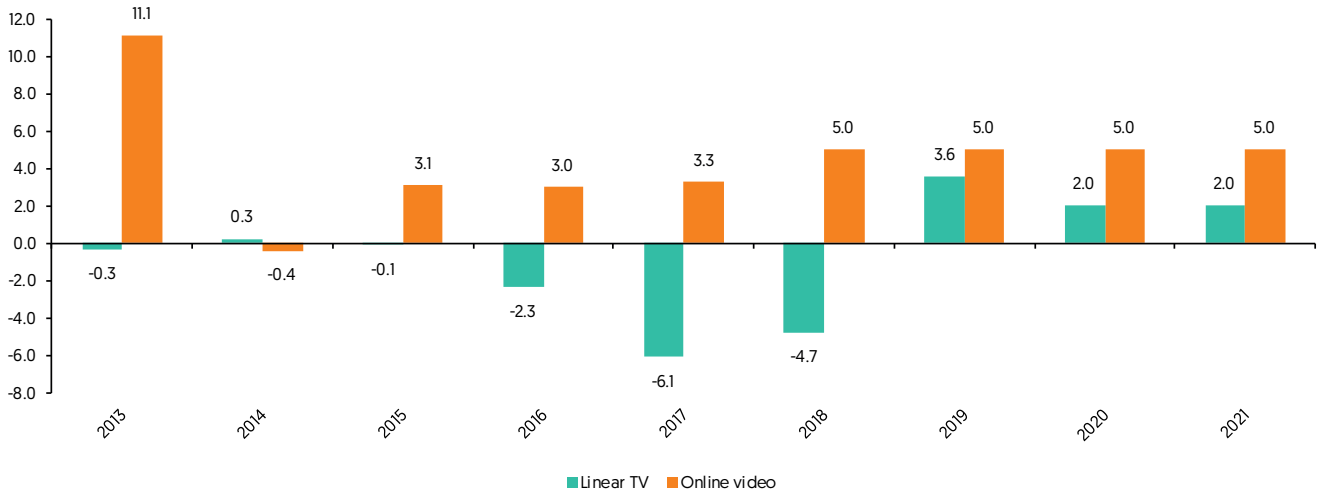
Netflix is the largest OTT video streamer, with around 14 million subscribers. Amazon Prime Video follows with around 3 million subscribers, and new to Canada is CBS All.

Advertising expenditure year-on-year growth (%)



Source: Numerator 2018, thinkTV, IAB, Zenith estimates

Regular viewer numbers year-on-year growth (%)



Source: Numeris, ind. 2+, comScore
**Average minute audience over broadcast year **Monthly*

China

Advertising expenditure (RMB million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	143,927.8	75,290.9	30,944.6	4,818.6	-
2013	149,972.7	110,000.0	39,270.0	7,810.0	-
2014	145,173.6	154,000.0	50,666.0	12,320.0	-
2015	137,189.0	209,440.0	63,250.9	17,174.1	6,698.8
2016	137,189.0	263,894.4	74,418.2	32,459.0	15,257.4
2017	123,470.1	306,117.5	71,631.5	35,815.7	18,984.2
2018	117,296.6	348,479.2	71,786.7	38,332.7	22,377.7
2019	105,567.0	379,279.2	75,476.6	39,824.3	24,443.2
2020	89,731.9	405,215.7	77,396.2	40,521.6	25,681.6
2021	71,785.5	420,769.5	78,263.1	40,814.6	26,479.5

Source: Publicis Media

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	21,754.6	11,380.2	4,677.3	728.3	-
2013	22,668.3	16,626.5	5,935.7	1,180.5	-
2014	21,943.0	23,277.1	7,658.2	1,862.2	-
2015	20,736.1	31,656.8	9,560.4	2,595.9	1,012.5
2016	20,736.1	39,887.6	11,248.3	4,906.2	2,306.2
2017	18,662.5	46,269.6	10,827.1	5,413.5	2,869.5
2018	17,729.4	52,672.5	10,850.5	5,794.0	3,382.4
2019	15,956.4	57,327.9	11,408.3	6,019.4	3,694.6
2020	13,563.0	61,248.2	11,698.4	6,124.8	3,881.8
2021	10,850.4	63,599.2	11,829.5	6,169.1	4,002.4

Source: Publicis Media

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	688,258	700,733	713,258	727,081	738,656	730,869	706,204	670,894	637,349	605,482
Number of regular connected TV viewers (000s)	8,692	15,175	23,850	33,340	50,357	121,834	174,395	209,274	240,665	264,732
Number of regular online video viewers (000s)	294,239	370,373	413,445	475,633	552,575	611,861	658,080	690,983	718,623	740,182

Source: China Market and Media Study (CMMS)

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	21.1	32.3	40.6	69.4	80.0	94.4	102.7	111.5	116.1
Time spent watching online video on mobile devices	-	4.8	13.9	15.6	39.3	44.8	55.8	61.1	65.1	68.3
Time spent watching online video on desktop/non-mobile	-	16.3	18.4	25.0	30.1	35.2	38.5	41.6	46.5	47.9

Source: iResearch

Demographics

	General population
	2017
Total (000s)	1,390,080
Gender (000s)	
Male	711,370
Female	678,710
Age (000s)	
under 14	233,480
15-64	998,290
65+	158,310
Socioeconomic status (000s)	
SES L1 - top 10% purchasing power	-
SES L2 - 20% purchasing power	-
SES L3 - 30% purchasing power	-
SES L4 - bottom 40% purchasing power	-

	Online video viewers			
	2018 - PC	2018 - Mobile		2018 - OTT*
Total (000s)	437,895	1,038,720		606,500
Gender (000s)				
Male	237,858	528,646		345,700
Female	200,037	510,074		260,790
Age (000s)				
18 or Under	37,998	68,192	**18 or Under**	24,260
19-24	123,419	199,504	**19-25**	121,300
25-30	91,708	249,364	**26-35**	236,530
31-35	72,393	245,362	**36-45**	145,560
36-40	56,793	125,150	**46-55**	60,650
40+	55,584	151,156	**55+**	18,190
Socioeconomic status (000s)				
SES L1 - top 10% purchasing power	15,752	-		-
SES L2 - 20% purchasing power	31,506	-		-
SES L3 - 30% purchasing power	47,251	-		-
SES L4 - bottom 40% purchasing power	63,003	-		-

Source: iResearch, All View Cloud, CMMS, stats.gov.cn
** Smart TV, TV Box or similar*

The top three video platforms in China are iQiyi, Tencent and Youku, in terms of device, unique visitors, total time spent and time spent per user. 89.6% of user volume was accounted for by these three sites in 2018. MangoTV and Bilibi showed strong growth in 2018, despite their limited share of the market.

Lifestyle video content (e.g. vlogs) has become the star performer in 2019. Led by a few key opinion leaders (KOLs), such as famous pop stars or internet celebrities, vlogging video content has increased massively in popularity.
As paid membership has become more popular in OTV platforms, the integration of ads and programmes remains important to drive effectiveness of OTV advertisements. Short video platforms such as TiKTok and Kuaishou have been performing aggressively over the past two years in China, but their ad formats are converted feeds or social ads. Hence, our spending and consumption data does not reflect the short video platforms. However, the short format content on online video platforms is considered.

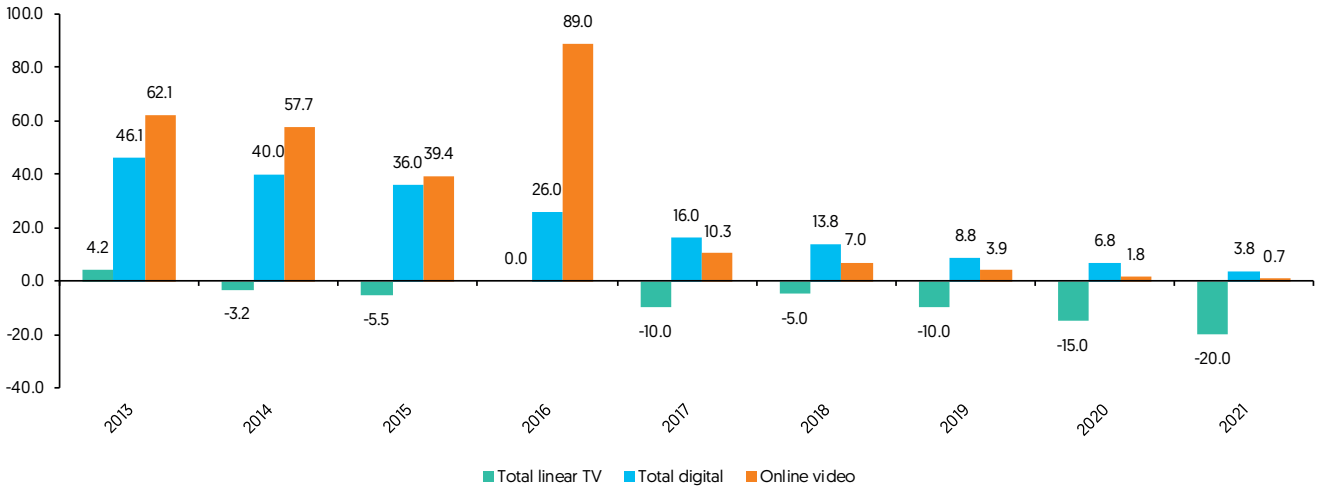
In terms of advertising embedded within the content, formats include pre-roll, insertion, tag/add on and corner ads.

The rise in OTT ads is also worth noting. The majority of OTT traffic is driven by video-on-demand services. OTT's media share of total digital is still small; however, OTT will become more important for digital media investment in the future. PSTV channels, such as Huanan PSTV, are launching their own online TV channels (e.g. MangoTV) to cope with the trend.

Mobile-based online video viewing will keep growing. However, the focus is moving towards short video platforms or social platforms. In the meantime, demographic changes mean that the number of new online video viewers will grow at a slower rate in coming years.

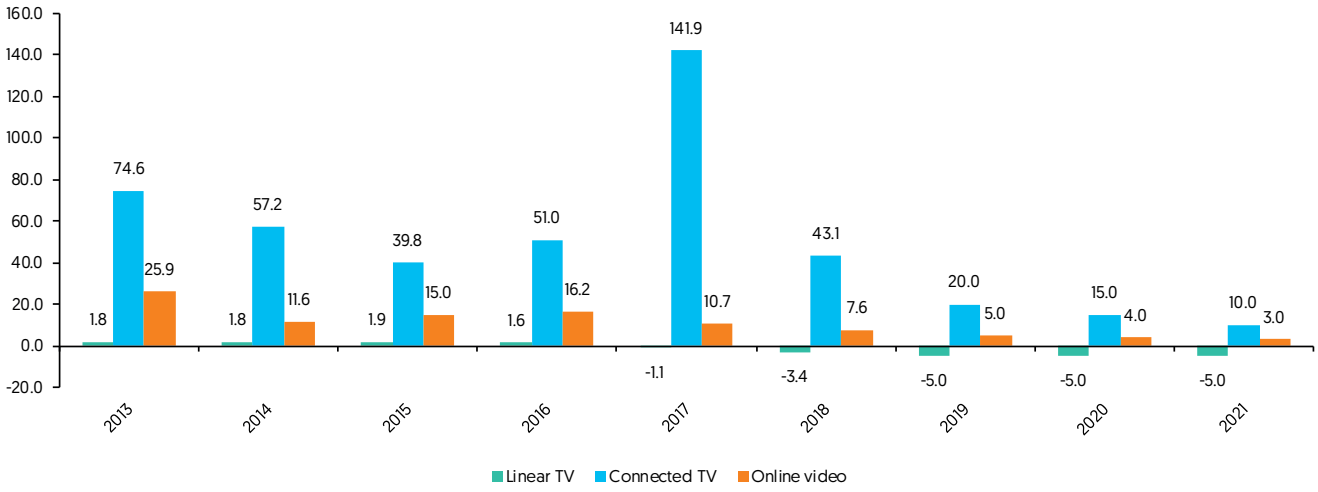
The government has launched several policies with the aim of regulating online content, which will increase the cost of licensing and production of online content, including OTV content. This will pose challenges for updating content and may make it more difficult to recruit viewers.

Advertising expenditure year-on-year growth (%)



Source: Publicis Media

Regular viewer numbers year-on-year growth (%)



Source: China Market and Media Study (CMMS)

Colombia

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	-	-	-	-	9,854	10,003	10,585	10,836	11,176	11,516
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)**	-	-	-	-	-	9,048	10,312	11,859	13,756	16,095

Source: TGI 2018
**Daily **Weekly*

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	13,671	10,312
Gender (000s)		
Male	6,552	4,975
Female	7,119	5,337
Age (000s)		
12-17	1,134	994
18-24	2,380	2,268
25-34	2,780	2,522
35-44	2,448	2,005
45-54	2,149	1,451
55+	2,780	1,073
Socioeconomic status (000s)		
NSE 5-6	1,399	1,192
NSE 3-4	7,077	5,429
NSE 2	5,194	3,691

Source: TGI 2018

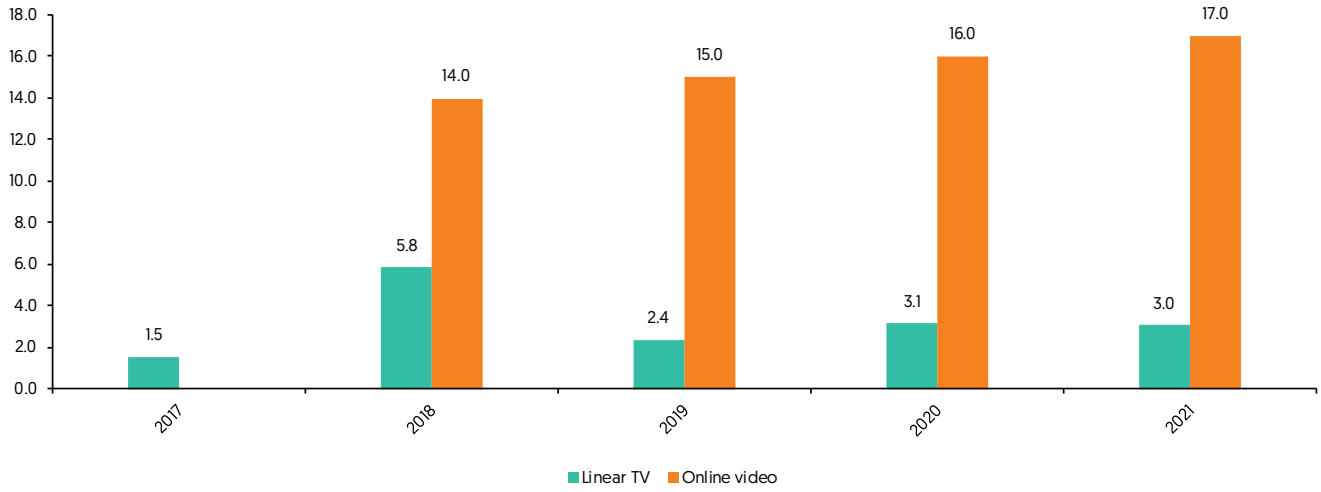
YouTube and Facebook are the main video platforms in Colombia.

Consumption is consistent across Colombia's regions, but within regions consumption tends to be highest in the cities.

Brand videos showing real-life content, providing useful information and connecting emotionally tend to attract the most views. For initial engagement, short videos (15 seconds long at most) are most effective, and if their content is relevant then users are willing to watch longer videos.

Most video consumption takes place on mobile devices, though desktop viewing is more common for long-form videos. Formats are generally adapted to mobile screens, with square and vertical videos most common.

Regular viewer numbers year-on-year growth (%)



Source: TGI 2018
**Daily **Weekly*

Croatia

Advertising expenditure (HRK million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	702.0	90.0	67.5	4.5	-
2013	685.0	107.0	78.1	6.4	-
2014	715.0	117.0	81.9	11.7	3.5
2015	740.0	168.0	112.6	20.2	6.7
2016	758.0	214.0	139.1	25.7	8.6
2017	741.0	245.0	154.4	34.3	9.8
2018	741.0	285.0	159.0	39.8	13.3
2019	755.0	330.0	167.0	51.8	17.3
2020	760.0	350.0	182.7	63.0	18.9
2021	765.0	380.0	198.0	79.0	21.0

Source: HURA, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	111.8	14.3	10.8	0.7	-
2013	109.1	17.0	12.4	1.0	-
2014	113.9	18.6	13.0	1.9	0.6
2015	117.9	26.8	17.9	3.2	1.1
2016	120.7	34.1	22.2	4.1	1.4
2017	118.0	39.0	24.6	5.5	1.6
2018	118.0	45.4	25.3	6.3	2.1
2019	120.2	52.6	26.6	8.3	2.8
2020	121.0	55.7	29.1	10.0	3.0
2021	121.8	60.5	31.5	12.6	3.3

Source: HURA, Zenith

Demographics

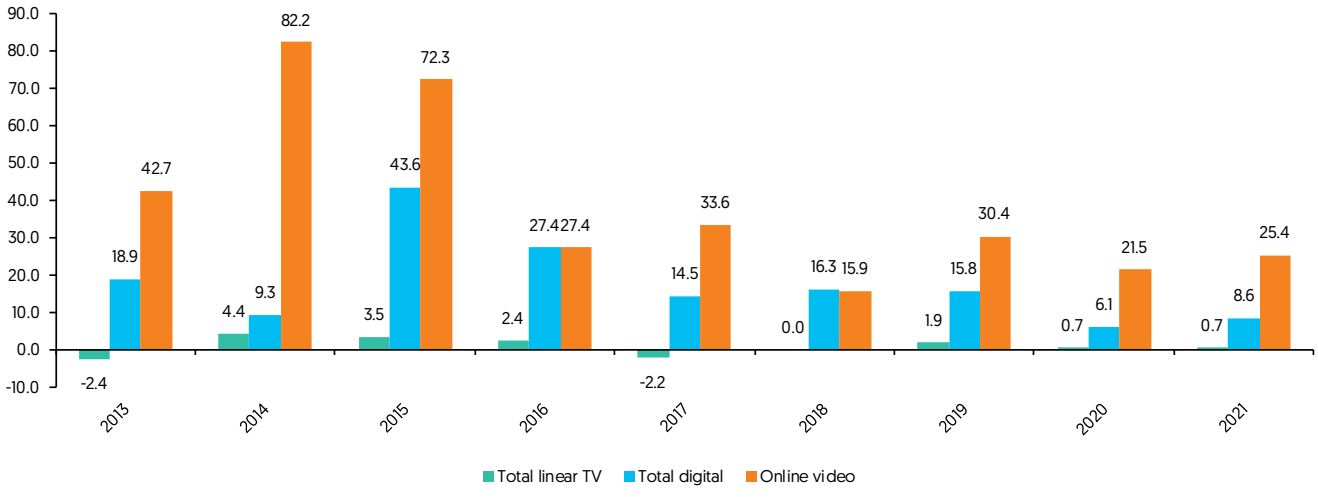
	General population	Online video viewers
	2017	2017
Total (000s)	2,874	769
Gender (000s)		
Male	1,413	424
Female	1,461	345
Age (000s)		
15-19	302	103
20-29	470	214
30-39	607	199
40-49	630	170
50-59	588	69
60-64	277	15
Socioeconomic status (000s)		
Lower income	645	108
Lower middle income	642	139
Higher middle income	649	205
Higher income	651	265
No answer	287	52

Source: BRANDpuls I. WAVE 2018

YouTube and Facebook are the dominant online video platforms in Croatia. The strongest local online video providers are TV sites, but other portals are also trying to tap into the online video market with in-article video positions and native online video content.

YouTube started to sell video ads in Croatia in 2014, and it was the turning point for video advertising as others followed. Exact data on online video consumption remains a challenge due to the lack of relevant and developed research.

Advertising expenditure year-on-year growth (%)



Source: HURA, Zenith

Czech Republic

Advertising expenditure (CZK million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	8,390	5,716	2,845	390	31
2013	7,600	6,035	3,133	580	70
2014	8,010	6,701	3,340	750	98
2015	8,490	7,196	3,540	875	131
2016	9,203	8,493	3,830	1,020	204
2017	9,740	9,919	4,062	1,180	283
2018	10,450	11,517	4,980	1,320	396
2019	11,120	12,374	5,321	1,390	445
2020	11,880	13,232	5,690	1,470	529
2021	12,560	14,033	6,034	1,580	632

Source: Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	386	263	131	18	1
2013	350	278	144	27	3
2014	369	308	154	35	4
2015	391	331	163	40	6
2016	424	391	176	47	9
2017	448	456	187	54	13
2018	481	530	229	61	18
2019	512	569	245	64	20
2020	547	609	262	68	24
2021	578	646	278	73	29

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	8,202	8,098	8,136	8,090	8,120	8,130	8,130	8,135	8,135	8,130
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	1,847	2,451	2,881	3,300	3,606	4,015	4,180	4,310	4,500

Source: MML-TGI 2018
Weekly

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	-	12.2	15.6	19.7	25.7	34.3	43.3
Time spent watching online video on mobile devices	-	-	-	-	0.7	1.5	3.2	7.0	13.5	20.6
Time spent watching online video on desktop/non-mobile	-	-	-	-	11.5	14.1	16.5	18.7	20.8	22.7

Source: Zenith

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	8,801	6,295
Gender (000s)		
Male	4,368	3,210
Female	4,433	3,085
Age (000s)		
under 16	151	97
16-24	1,073	946
25-34	1,456	1,279
35-44	1,813	1,513
45-54	1,312	1,047
55-64	1,454	869
65+	1,542	542
Socioeconomic status (000s)		
AB	2,017	1,731
C1C2C3	3,883	2,885
D1D2E	2,902	1,678

Source: MML-TGI 2018
**Monthly*

The position of video platforms in the Czech Republic is stable. The main platforms are YouTube, Stream, Facebook, iprima.cz, nova.cz, ceskatelevize.cz and iDnes Kino (the descendant of playtvak.cz). Netflix is in fourth position among VOD platforms.

Video streaming is growing steadily on mobile devices as mobile data gets ever cheaper.

There are several successful online TV channels – the first was DVTV, founded in 2014. The Czech online leader Seznam started at the end of 2016, offering the online news service Seznam Zprávy (Seznam News). This became the basis of the TV channel Televize Seznam, which was launched in January 2018.

Demographics vary according to the platform being used - for example, YouTube and Stream users tend to skew more male, whereas iprima.cz and nova.cz are more popular with women. Online video use is highest among users aged 15-44; use declines with age.

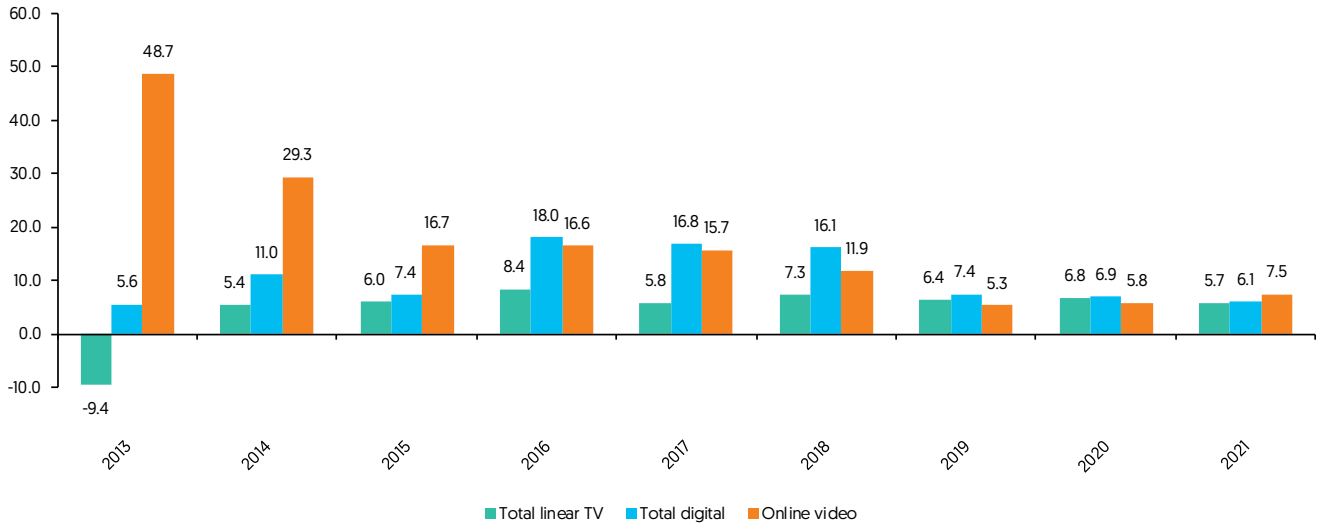
The amount of video content on YouTube is steadily increasing, and the number of users and the time they spend consuming video content are also rising year on year. Online video is now a necessary complement to television campaigns, and will only become more important in future.

Mobile viewing is very popular and is still growing, though YouTube still gets most of its views on desktop devices.

Advertisers mostly use pre-roll in-stream formats for brand awareness and brand consideration. Bumper ads are used for retargeting, cheap amplifying or teasing campaigns, while outstream formats are only used occasionally; to get incremental reach (especially on mobiles).

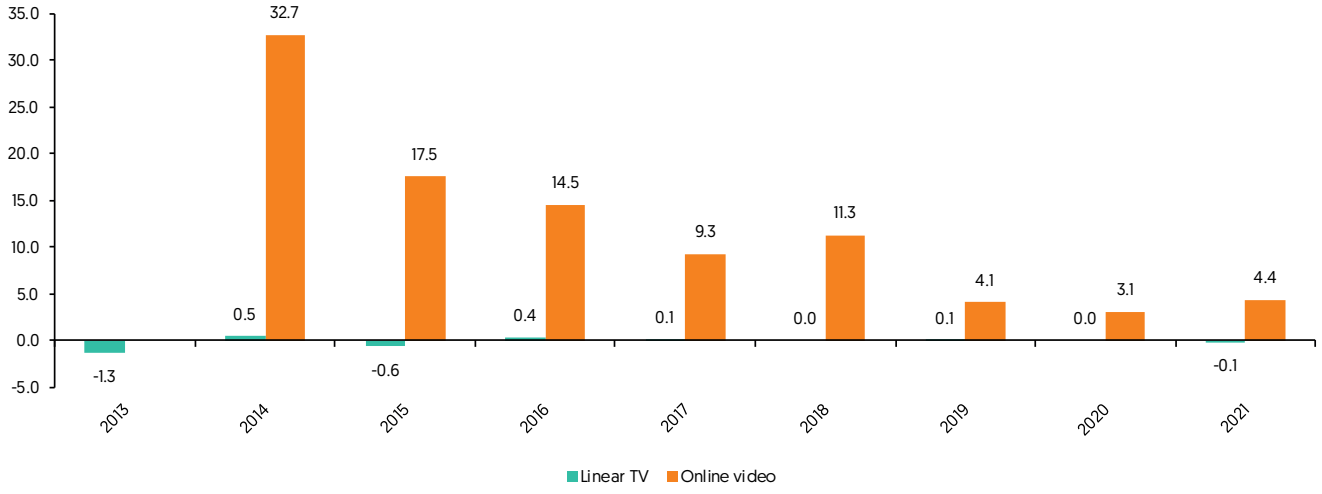
Platforms are developing formats for specific campaign goals, particularly YouTube, which has specific formats for impact, action, or shopping. By the end of the year we expect YouTube to be able to target connected TVs.

Advertising expenditure year-on-year growth (%)



Source: Zenith

Regular viewer numbers year-on-year growth (%)



Source: MML-TGI 2018 Weekly

Denmark

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	4,324	4,301	4,221	4,102	3,847	3,768	3,652	3,551	3,452	3,356
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)**	2,673	2,950	3,219	3,494	3,689	3,869	4,000	4,100	4,182	4,266

Source: TNS Gallup, Index Denmark, eMarketer, Zenith
**Daily **Weekly*

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	-	48.7	56.5	62.7	71.2	80.8	91.6
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: TNS Gallup, Index Denmark, Zenith

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	50	50	55	57	58	60	65	70	72	75
Average proportion of online video ads that are fraudulent	3	3	2	2	2	1	1	1	1	1

Source: Publicis Media, Zenith

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	4,987	4,000
Gender (000s)		
Male	2,469	2,060
Female	2,518	1,940
Age (000s)		
under 16	242	238
16-24	699	693
25-34	704	696
35-44	731	699
45-54	814	717
55-64	702	497
65+	1,095	460
Socioeconomic status (000s)		
High social class	1,087	1,001
Middle social class	2,133	1,658
Low social class	1,257	958

Source: TNS Gallup, Index Denmark 2018

More than two million Danes aged over 18 (44% of the total population) watch online video every day. There are many online video providers in Denmark, competing fiercely for viewers. Currently there are around 10 ad-free subscription-based providers – like Netflix, and they have about 0.9 million daily users. The largest advertising-based free provider is Viafree (NENT), with just below 300,000 users. This was the first mover in the Danish ad-based streaming market, establishing a strong market position. It remains the leading provider, despite competition from D-Play (Discovery).

Overall, the three largest platforms are YouTube, Netflix and DR (from the public-service TV broadcaster), which have 1.0 million, 0.7 million and 0.6 million regular viewers respectively.

Fewer 28-34 year-olds are watching linear TV, and those that do are devoting less time to it. The opposite is true for online video. Online video viewing is heavily skewed towards younger demographics, YouTube and ad-free subscription platforms in particular. Online viewing is also more common in the cities than in rural areas..

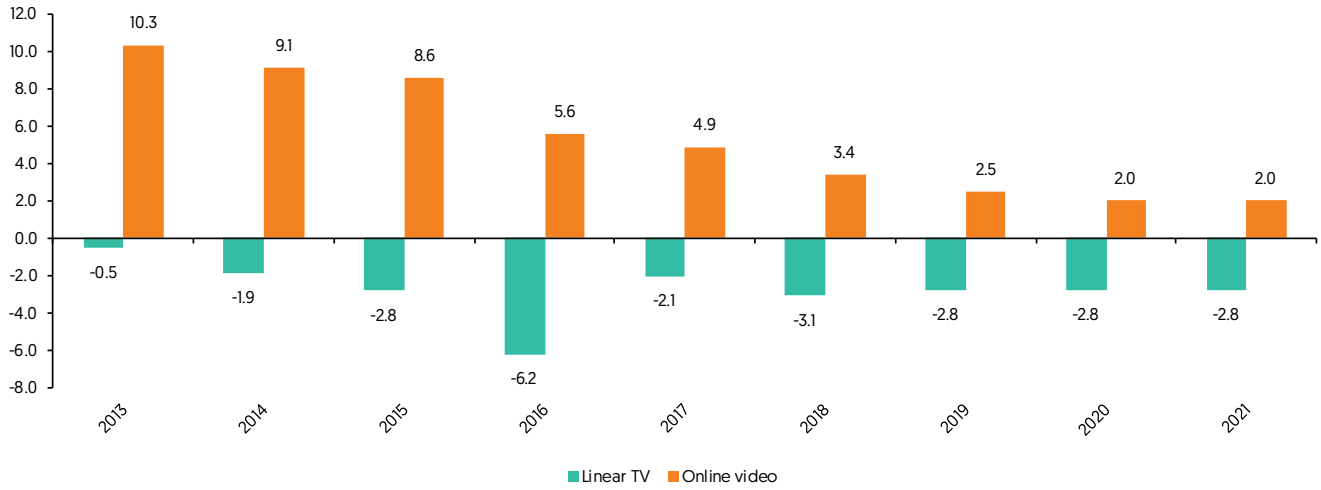
While it's not common for budgets to explicitly move from linear TV to online video, online video's share of budgets is rising rapidly. It is becoming ever more important for campaigns targeting young audiences and broad target groups.

Ad viewability and time-in-view is a hot topic. Talking openly about viewability is key to improving transparency, building trust and increasing ROI, while recognising that currently, there is a trade-off between price and transparency.

The ad formats most commonly used depend on the video content that the ads appear in. In longer-form content in streaming services, the longer ad formats of 15 to 30 seconds are still the most used. In short videos on social media or YouTube, for example, it is most common to use a 20-second ad followed by a six-second bumper.

Investment in mobile video ads is growing rapidly. However, Danish consumers have traditionally seen mobile ads as more intrusive, annoying and less trustworthy, so brands need to ensure that their ads are of high quality and are relevant to the context in which they appear to ensure continued growth.

Regular viewer numbers year-on-year growth (%)



Source: TNS Gallup, Index Denmark, eMarketer, Zenith
**Daily **Weekly*

Ecuador

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	250.3	5.6	1.8	-	-
2013	268.5	7.4	5.5	-	-
2014	269.1	20.0	14.0	-	-
2015	238.3	20.1	14.3	-	-
2016	177.7	28.4	21.3	-	-
2017	174.5	31.1	23.5	4.7	-
2018	156.1	50.7	41.2	6.1	-
2019	149.4	60.9	50.7	10.1	-
2020	143.1	73.1	60.8	12.2	-
2021	137.1	87.7	74.0	14.8	-

Source: Infomedia

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	-	-	-	6,712	6,506	6,300	6,094	5,972	5,883	5,824
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	-	-	2,312	3,298	4,283	5,269	5,532	5,698	5,812

Source: ENM, Zenith Weekly

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	9.9	11.3	15.8	40.5	47.2	49.5	51.0
Time spent watching online video on mobile devices	-	-	-	4.6	5.8	9.4	32.7	41.9	46.7	49.9
Time spent watching online video on desktop/non-mobile	-	-	-	4.4	4.7	5.2	7.8	5.3	2.8	1.0

Source: TGI, Zenith

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	6,428	5,269
Gender (000s)		
Male	3,149	2,543
Female	3,279	2,726
Age (000s)		
12-17	1,077	794
18-24	1,177	947
25-34	1,486	1,210
25-44	1,254	1,070
45-60	1,434	1,248
Socioeconomic status (000s)		
High/medium high	740	698
Mainstream	2,189	1,970
Low	3,499	2,600

Source: ENM

The main platforms in Ecuador are YouTube, Vimeo, Daily Motion, Twitch and TikTok.

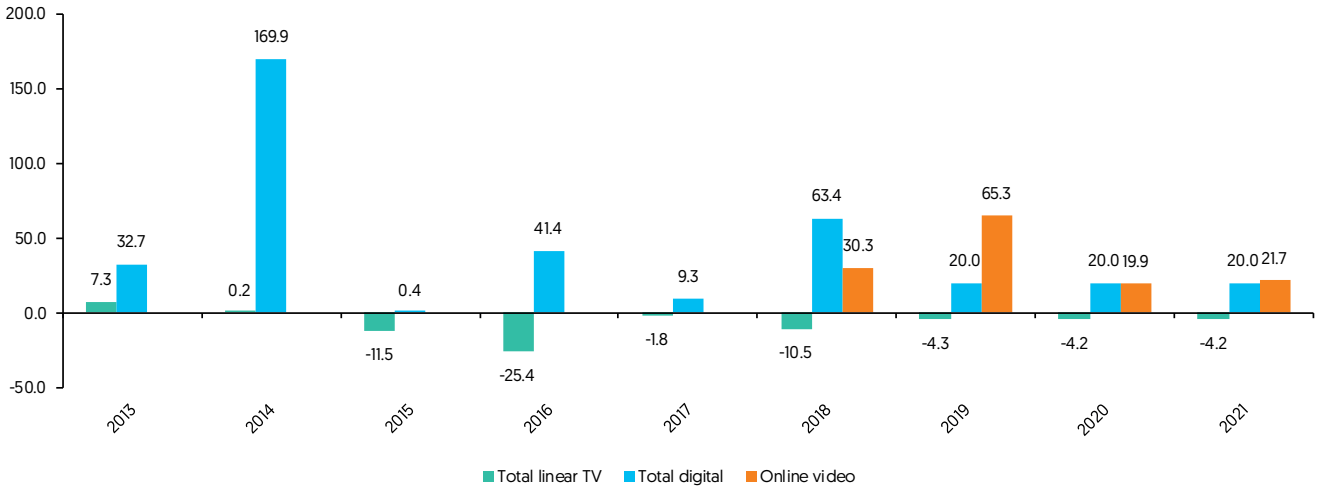
Short-form content is most popular, accounting for about two thirds of all views.

Brands use online video to complement linear TV by creating dedicated short videos that provide additional information. They mainly use bumper ads or video ads of less than 10 seconds for branding and promo purposes, and rewarded video ads for engagement.

Influencers and entrepreneurs use owned video for promotional activities.

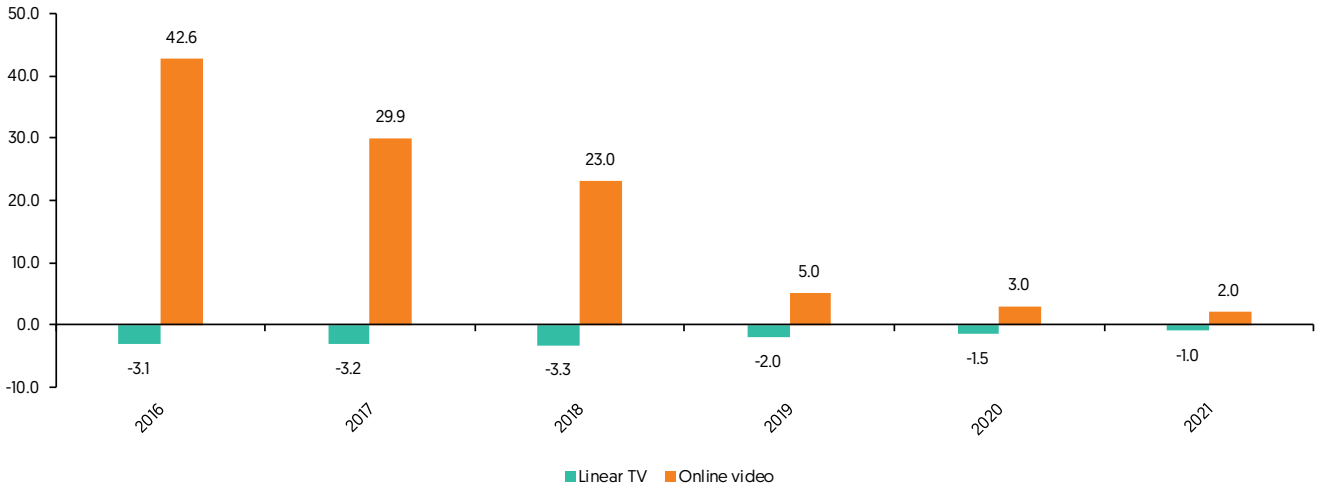
Local brands are not highly educated about viewability, brand safety and fraud issues, and generally follow the lead of big markets.

Advertising expenditure year-on-year growth (%)



Source: Infomedia, Zenirth

Regular viewer numbers year-on-year growth (%)



Source: ENM, Zenith Weekly

Estonia

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	22.3	12.0	11.0	0.7	0.2
2013	24.1	13.3	12.1	0.9	0.4
2014	25.0	15.8	13.3	1.0	0.2
2015	25.4	17.2	14.3	2.4	0.4
2016	25.2	18.9	15.1	2.8	0.5
2017	25.6	20.1	16.4	3.2	0.5
2018	26.4	20.2	16.5	3.2	1.0
2019	27.5	21.2	17.0	3.3	0.5
2020	28.0	22.3	18.0	3.5	1.0
2021	28.5	23.5	19.0	3.7	1.0

Source: Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	26.4	14.2	13.0	0.8	0.2
2013	28.4	15.7	14.3	1.1	0.5
2014	29.5	18.7	15.7	1.2	0.2
2015	30.0	20.4	16.9	2.8	0.5
2016	29.8	22.4	17.8	3.3	0.6
2017	30.2	23.8	19.4	3.8	0.6
2018	31.2	23.9	19.5	3.8	1.2
2019	32.5	25.1	20.1	3.9	0.6
2020	33.1	26.3	21.3	4.1	1.2
2021	33.7	27.8	22.4	4.4	1.2

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	946	932	923	906	894	882	894	879	879	875
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	425	477	503	555	612	785	787	790	790

Source: Kantar Emor Media TGI (Adults 15-74), Zenith Monthly

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	49	54	47	51	52	54	55
Time spent watching online video on mobile devices	-	-	-	9	13	22	20	26	30	34
Time spent watching online video on desktop/non-mobile	-	-	-	40	41	25	31	26	24	21

Source: Kantar Emor Mediaday, Zenith

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	975	785
Gender (000s)		
Male	471	383
Female	504	401
Age (000s)		
15-24	119	116
25-34	187	185
35-44	199	186
45-54	168	124
55-64	166	121
65+	136	53

Source: Kantar Emor Media TGI (Adults 15-74)

The online video market is a combination of international platforms like YouTube, vk.com, Facebook, Instagram and Twitch.tv, and local ones like Postimees, Kanal2.ee, TV3Play.ee and tv.Delfi.ee.

The international platforms tend to be more popular with young viewers, while the local platforms have older viewers. Vk.com and Ok.ru are mainly watched by Russian speakers.

Local YouTubers/Instagrammers are steadily becoming more popular, and some have more than 100,000 followers, mostly teenagers.

Pre-roll ads are most common. On tv.Delfi.ee they can be as long as 30 seconds, but most play for 15-20 seconds. On Kanal2.ee, TV3Play.ee and YouTube.com, ads can last up to 60 seconds, but most are between 15 and 30 seconds long.

Brands are becoming more interested in online video, and are investing more in it. Outstream advertising is becoming more common.

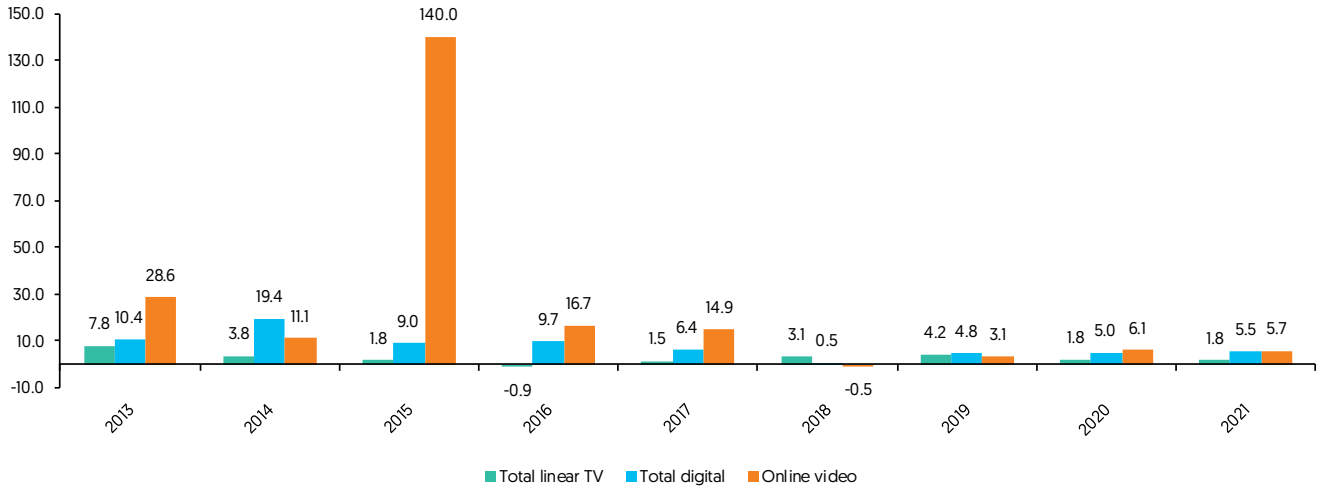
Brands generally use video ads for awareness purposes.

Channels claim high viewability rates of over 90%. Most ads on the local platforms are either not skippable, or only skippable after 15 seconds.

Local players continue to grow. Delfi TV and Postimees are making big efforts to stream more live events (such as sports and concerts), and produce more video news and other content. YouTube is getting more popular as both big and small clients invest in TrueView advertising. Facebook is getting more popular among small businesses and bloggers, because it is so easy to use.

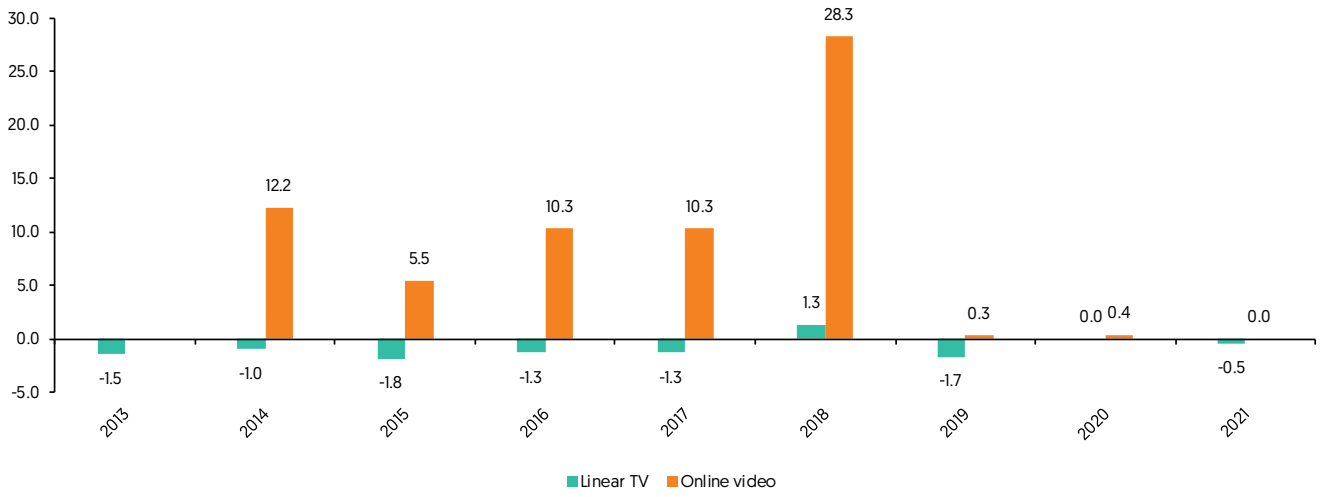
The production of owned content is increasing, and many advertisers now have in-house content specialists. This content is mostly shared via Facebook, Instagram and LinkedIn.

Advertising expenditure year-on-year growth (%)



Source: Zenith

Regular viewer numbers year-on-year growth (%)



Source: Kantar Emor Media TGI (Adults 15-74), Zenith Monthly

Finland

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	280.0	222.4	141.0	-	-
2013	275.0	237.7	152.0	-	-
2014	265.2	242.0	114.0	13.0	-
2015	255.8	285.9	153.0	16.0	-
2016	253.1	324.0	188.0	16.2	-
2017	240.0	370.0	222.0	19.6	-
2018	241.0	419.0	259.6	20.9	-
2019	237.0	463.0	291.7	23.5	-
2020	236.0	510.0	337.4	25.0	-
2021	235.0	540.0	363.0	27.0	-

Source: Kantar TNS; IAB Finland, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	330.8	262.8	166.6	-	-
2013	324.9	280.8	179.6	-	-
2014	313.3	285.9	134.7	15.4	-
2015	302.2	337.8	180.8	18.9	-
2016	299.0	382.8	222.1	19.1	-
2017	283.5	437.1	262.3	23.2	-
2018	284.7	495.0	306.7	24.7	-
2019	280.0	547.0	344.6	27.8	-
2020	278.8	602.5	398.6	29.5	-
2021	277.6	638.0	428.9	31.9	-

Source: Kantar TNS; IAB Finland, Zenith

Consumption - number of viewers (adults age 15-74)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	2,960	2,863	3,022	3,007	2,643	2,607	2,554	2,510	2,465	2,420
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	460	690	1,495	2,185
Number of regular online video viewers (000s)	-	-	-	-	1,852	2,036	2,179	2,350	2,500	2,660

Source: TNS Atlas 2018 Intramedia, Digita, Zenith Daily

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	-	50.0	61.0	69.4	77.0	82.0	84.0
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: TNS Atlas 2018 Intramedia, Digita, Zenith

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	-	-	-	90/50*	-	-	-
Average proportion of online video ads that are fraudulent	-	-	-	-	-	-	0.5	0.4	0.3	0.2

Source: Dagmar, Zenith
** in-stream/out-stream ads*

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	3,801	2,179
Gender (000s)		
Male	1,905	1,187
Female	1,897	992
Age (000s)		
15-24	574	470
25-34	615	455
35-44	606	383
45-54	644	320
55-64	699	294
65-74	663	257
Socioeconomic status (000s)		
Director/Upper white collar	544	328
Lower white collar	527	294
Blue collar, farmer	381	235
Entrepreneur	81	48
Pensioner	957	395
Student, pupil	439	355
Other	873	524

Source:

YouTube is the main platform, and local broadcasters' platforms are becoming more popular. Out-stream video on publishers' websites is growing rapidly.

The heaviest users of online video are 18-25 year-olds, but broadcasters' platforms and publishers' out-stream ads do reach older demographics as well.

The amount of long-form content available is increasing, particularly on broadcasters' platforms. Entertainment and escapism sell well. YouTube influencers are gaining in popularity rapidly.

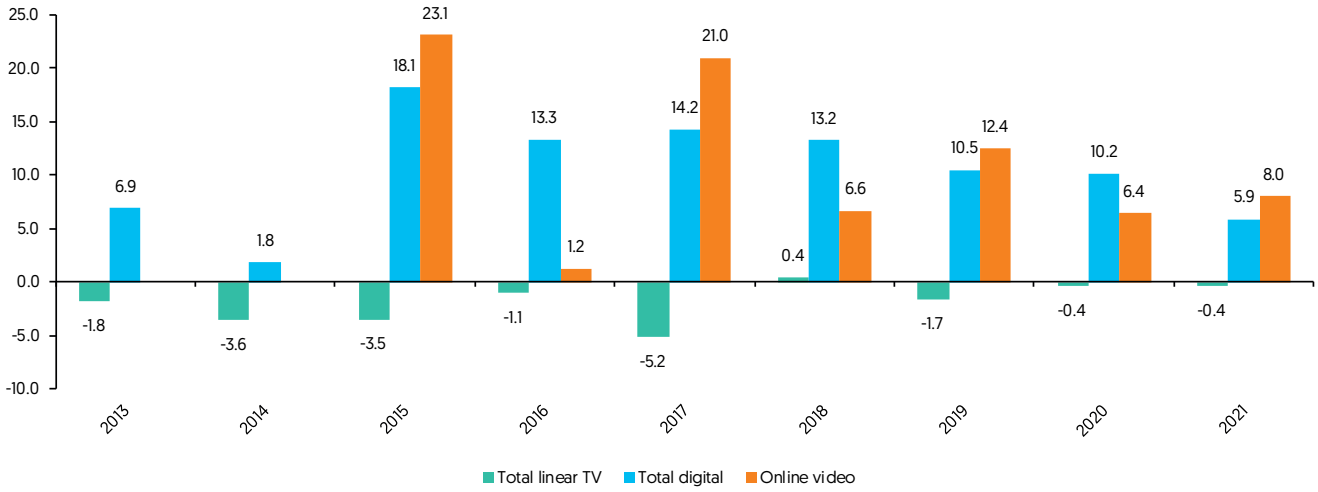
Influence marketing and product placement are common. Six-second bumper ads work best for cost-effective reach. Out-stream and pre-roll ads provide impact and wider visibility.

Hardly any advertiser has abandoned linear TV, but online video is steadily gaining ground as a complement. The direct use of TV ads in online video environments is being replaced by customised formats.

There is a growing demand for marketing-as-a-service, in which content must provide the customer with genuine added value; plain branded video is not enough.

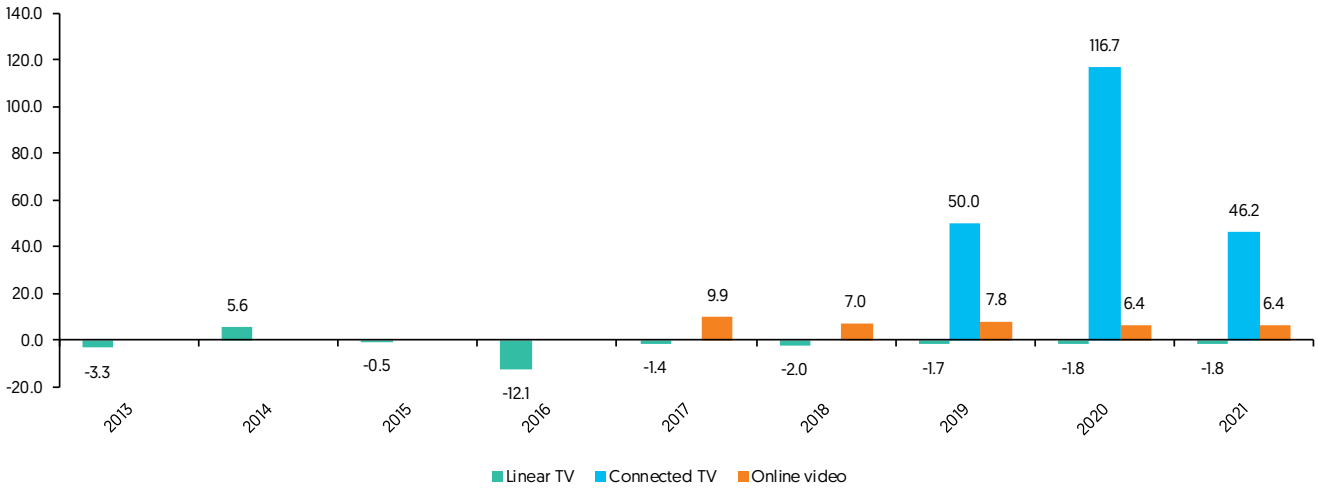
Mobile video viewing is still on the rise, thanks to huge improvements to the user experience, and rising without cannibalising much viewing on other devices.

Advertising expenditure year-on-year growth (%)



Source: Kantar TNS; IAB Finland, Zenith

Regular viewer numbers year-on-year growth (%)



Source: TNS Atlas 2018 Intramedia, Digita, Zenith Daily

France

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	3,285	2,551	738	102	0
2013	3,170	2,643	753	136	30
2014	3,222	2,911	958	230	70
2015	3,242	3,076	1,051	309	111
2016	3,254	3,323	1,204	417	158
2017	3,286	3,754	1,450	577	267
2018	3,294	4,521	1,974	847	468
2019	3,327	5,109	2,315	1,084	650
2020	3,347	5,681	2,643	1,312	853
2021	3,357	6,237	2,962	1,535	1,074

Source: IREP, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	3,881	3,014	872	121	0
2013	3,745	3,123	890	161	35
2014	3,807	3,439	1,132	272	83
2015	3,830	3,634	1,242	365	131
2016	3,844	3,926	1,422	493	187
2017	3,882	4,435	1,714	681	315
2018	3,892	5,342	2,332	1,001	553
2019	3,931	6,036	2,735	1,281	769
2020	3,954	6,712	3,123	1,550	1,007
2021	3,966	7,369	3,500	1,813	1,269

Source: IREP, Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	49,431	49,696	49,852	49,734	49,010	48,763	48,843	48,651	48,408	48,117
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	30,967	31,912	32,332	33,133	35,039	35,378	36,096	36,818	37,554	38,305

Source: Médiamétrie
Monthly

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	3.5	5.0	6.7	8.9	10.8	12.6	14.4	16.2	17.9	19.6
Time spent watching online video on mobile devices	-	0.7	1.5	2.8	3.6	6.0	9.0	11.8	14.2	16.4
Time spent watching online video on desktop/non-mobile	3.5	4.3	5.2	6.1	7.2	6.6	5.4	4.4	3.7	3.2

Source: Médiamétrie, Media In Life

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	53,025	36,096
Gender (000s)		
Male	25,383	17,868
Female	27,642	18,228
Age (000s)		
15-24	7,793	6,606
25-34	7,465	6,497
35-49	12,376	9,457
50-64	12,456	7,652
65+	12,934	5,884

Source: Insee, Médiamétrie

The most popular video platforms in France are YouTube and Facebook, distantly followed by Dailymotion, MyTF1, France.TV, BFM, 6 play, Allociné and LeFigaro.fr.

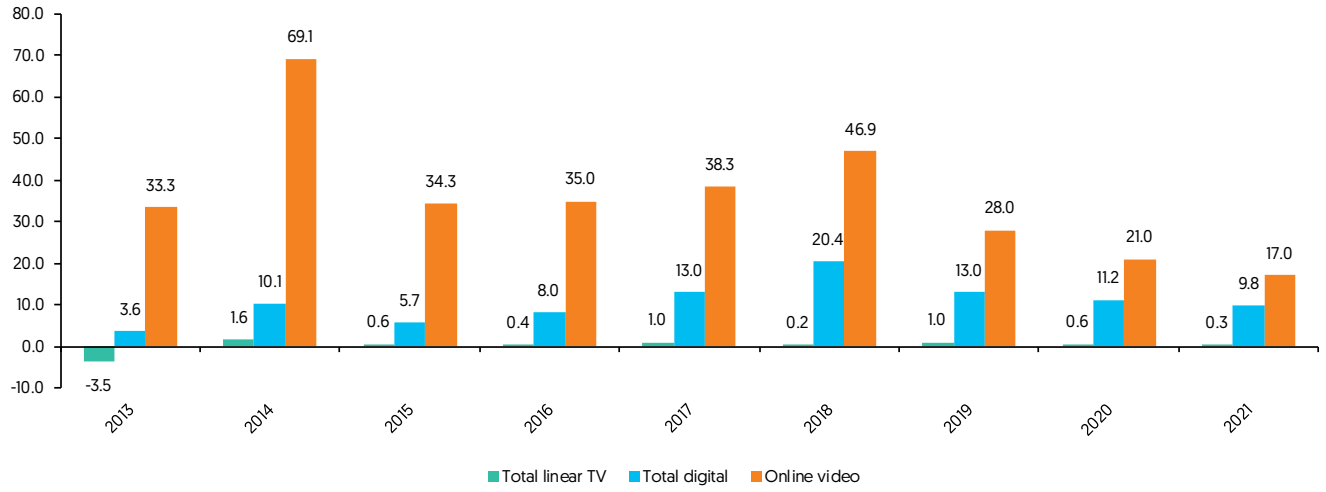
Online video viewers skew young and well-off.

Short-form videos are most popular, particularly clips, trailers, comedy videos and tutorials.

Pre-roll ads are most common, supplemented by mid-roll ads in some catch-up sites (like myTF1 and 6play).

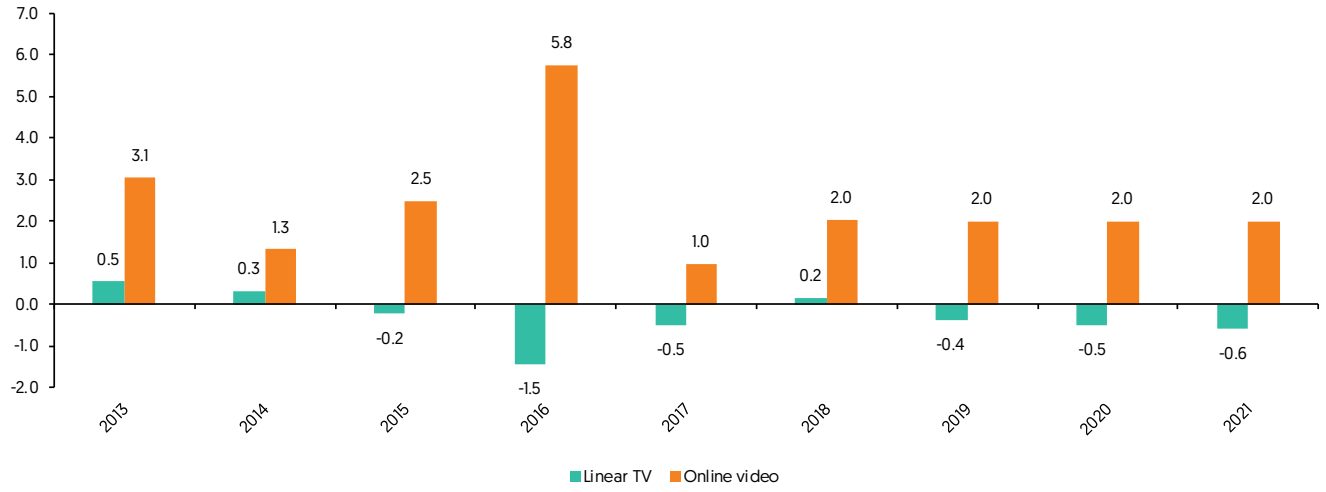
Video advertising (TV + online video) is a dynamic part of the ad market, and we expect it to grow by 5% per year between 2018 and 2021. Online video represented 20% of total video adspend in 2018, and we forecast it will take 31% in 2021. Mobile video is growing very quickly: it represented 55% of total online video online adspend in 2018 and we forecast it will grow to 70% in 2021, thanks to out-stream video.

Advertising expenditure year-on-year growth (%)



Source: IREP, Zenith

Regular viewer numbers year-on-year growth (%)



Source: Médiamétrie Monthly

Georgia

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	37.9	1.0	0.6	0.4	-
2013	40.1	2.9	1.0	0.6	-
2014	40.6	3.7	1.5	0.8	-
2015	32.8	3.2	1.4	1.0	-
2016	36.0	3.9	2.2	1.3	-
2017	35.3	5.0	2.9	1.6	-
2018	36.7	6.3	3.1	2.1	-
2019	37.8	6.6	3.8	2.1	-
2020	39.4	8.5	4.5	2.3	-
2021	41.4	9.4	5.2	2.8	-

Source: AGB, Zenith estimates

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	367	424	474	496	505	514	523	530	537	542

Source: AGB, Zenith estimates
Daily

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	3,730	523
Gender (000s)		
Male	1,792	234
Female	1,938	289
Age (000s)		
under 16	534	70
16-24	644	115
25-34	546	102
35-44	494	98
45-54	480	70
55-64	485	65
65+	546	3

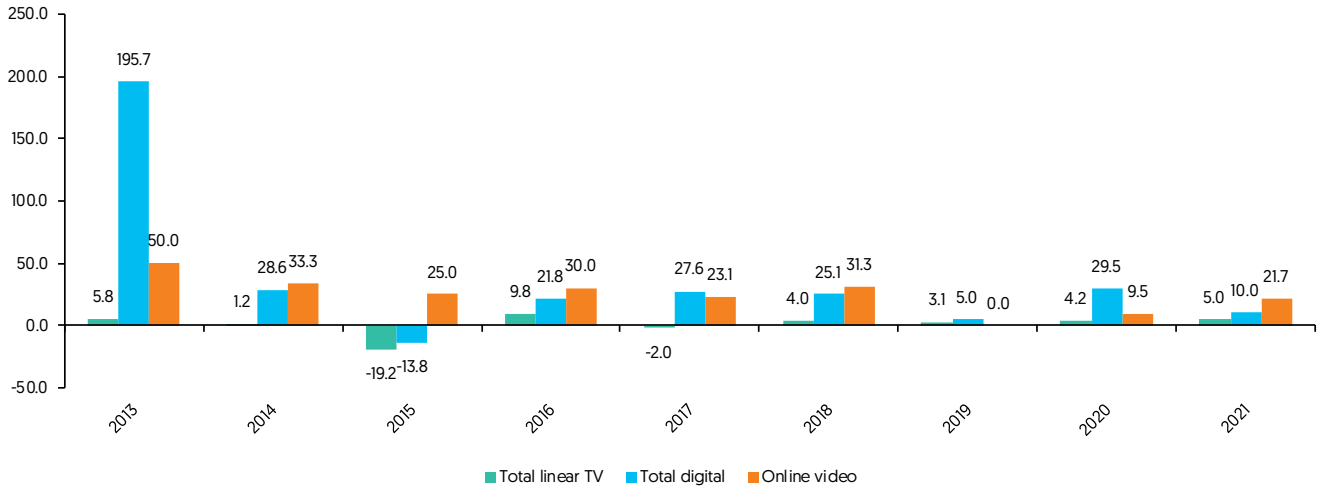
Source: Zenith

YouTube is Georgia's most popular online video platform. The most active online video viewers are aged 16-24.

Pre-rolls, bumper ads and in-stream videos are the top ad formats; bumper ads are used for reach and awareness, while in-stream videos are used for quality, true views.

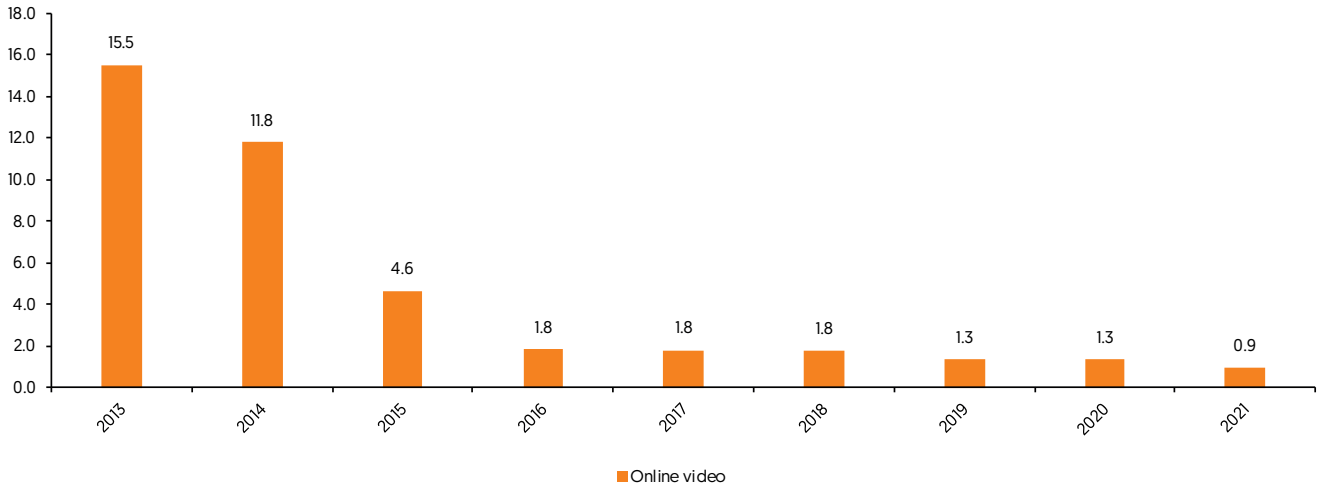
Mobile-based video has a big future. Internet consumption via mobile devices is on the up and so is mobile video viewing. At the moment, most publishers are not ready to sell mobile advertisements because their mobile platforms still do not work properly, with the result that clients are not investing in mobile. Nevertheless, over time mobile will come into its own as a platform.

Advertising expenditure year-on-year growth (%)



Source: AGB, Zenith estimates

Regular viewer numbers year-on-year growth (%)



Source: AGB, Zenith estimates
Daily

Germany

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	4,037.7	3,749.2	1,054.2	202.5	7.4
2013	4,125.1	4,150.0	1,261.3	228.2	14.6
2014	4,292.0	5,282.0	1,344.2	267.6	40.8
2015	4,422.0	5,804.0	1,424.7	329.1	70.3
2016	4,560.0	6,367.0	1,517.4	505.8	103.7
2017	4,591.0	6,791.0	1,638.8	569.4	224.5
2018	4,537.0	7,433.0	1,755.1	493.2	258.5
2019	4,455.3	7,944.0	1,876.2	469.0	334.5
2020	4,388.5	8,558.9	2,020.7	491.0	374.4
2021	4,388.5	9,182.0	2,168.2	505.0	423.6

Source: ZAW, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	4,770.3	4,429.4	1,245.4	239.3	8.7
2013	4,873.6	4,903.0	1,490.2	269.7	17.2
2014	5,070.8	6,240.4	1,588.1	316.1	48.2
2015	5,224.4	6,857.1	1,683.3	388.9	83.0
2016	5,387.4	7,522.3	1,792.7	597.5	122.5
2017	5,424.0	8,023.2	1,936.1	672.7	265.3
2018	5,360.2	8,781.7	2,073.6	582.6	305.4
2019	5,263.8	9,385.5	2,216.7	554.1	395.2
2020	5,184.8	10,111.9	2,387.4	580.1	442.3
2021	5,184.8	10,848.0	2,561.7	596.6	500.4

Source: ZAW, Zenith

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	16.0	20.0	23.0	31.0	35.0	42.0	44.0
Time spent watching online video on mobile devices	-	-	-	-	12.2	15.0	21.7	25.6	33.1	36.7
Time spent watching online video on desktop/non-mobile	-	-	-	-	7.8	8.1	9.3	9.5	8.9	7.3

Source: SevenOne Media, Zenith

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	61.0	59.0	56.0	61.0	59.0	60.0	61.0
Average proportion of online video ads that are fraudulent	-	-	-	-	-	-	-	-	-	-

Source: Meetrics

Demographics

	General population	Online video viewers
	2017	2017
Total (000s)	82,792	63,728
Gender (000s)		
Male	40,844	32,266
Female	41,949	31,462
Age (000s)		
under 16	11,172	-
16-24	8,683	-
25-44	20,540	-
35-64	24,688	-
65+	17,710	-

Source: Destatis

YouTube is the leading platform for online video in Germany. The most popular video on demand services are Amazon Prime/Amazon Video and Netflix.

The type of content viewed is user generated, semi-professional and professional. Premium video inventory is collected under the brand Google Preferred.

So far, few clients have a real channel strategy for owned video. Often they only have a platform where their video inventory lives, but collaborations with YouTube creators and influencers have become popular.

Different types of advertising are embedded within online video content, including non-skippable pre-roll (15 and 20 seconds) on a CPM/CPV basis; skippable video ads (TrueView in-stream) on a CPV basis; search video ads (TrueView discovery) on a CPV basis; and mastheads on the YouTube home page.

In general, all video ads have a viewability rate of 96% and are watched with sound on at 96%. There are awareness products: mastheads on the YouTube home page (big leaderboard), bumper ads (six seconds), Google Preferred and True View for reach; consideration products: TrueView discovery and TrueView in-stream; and action products: TrueView for action, TrueView for shopping, and TrueView for download. The effectiveness of video formats can be measured via brand lift surveys (ad hoc video questionnaires according to the campaign).

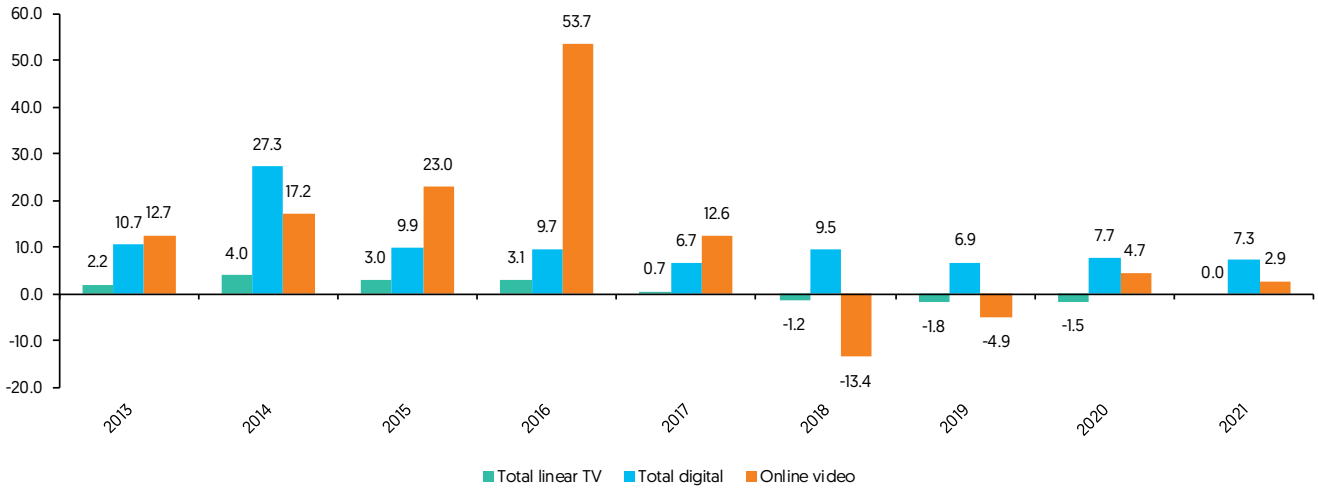
The extent to which advertisers have used online video to replace or complement linear TV advertising depends, of course, on the industry. Overall, however, there has been a huge shift towards online video (media consumption and media share). Our recommendation for classical TV buyers is 10% on YouTube, but there are already many clients that use only online video for their campaigns. YouTube has established itself as a performance channel for advertising with several new formats.

Ad pods have been introduced recently - a new delivery experience that shows two skippable pre-roll or mid-roll ads one right after the other to create an ad experience that is much more like linear TV. YouTube says viewers experienced up to 40% fewer interruptions when two ads were delivered in a single break versus being spread throughout a video.

The fastest-growing screen, though, is the screen in the living room (via PS4, XBox, Apple TV, Smart TV Apps, etc.). VR and AR is the next innovation level for online video (the first media campaigns using these have run already). Choice (let the user skip) and immersion (VR/AR) will become vital for successful campaigns.

The future of audiovisual advertising is mobile first. Last year, more than 50% of online videos were watched within the YouTube app on smartphones, and this is set to increase. New ad products are being developed for the mobile age (for example, six-second bumper ads), while others will disappear (30 second video ads).

Advertising expenditure year-on-year growth (%)



Source: ZAW, Zenith

Greece

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	21,860	17,051
Gender (000s)		
Male	10,539	8,039
Female	11,321	9,012
Age (000s)		
under 16	1,500	1,216
16-24	4,787	4,241
25-34	4,560	3,887
35-44	3,637	3,023
45-54	3,067	2,372
55-64	2,526	1,571
65+	1,785	742
Socioeconomic status		
High	4,601	3,973
Medium	6,710	5,468
Low	10,549	7,610

Source: TGI January - December 2018 (Kantar Ibope Media)

Greece's digital infrastructure has been inhibited by its troubled economy. Nowadays, though, the economy has started to show signs of mild strengthening, with economic growth expected to continue in upcoming months. Nevertheless, relatively few consumers have the disposable income to spend on paid-for digital video services or devices such as smartphones.

According to Google, watching online video is the most popular online activity in Greece alongside search, both reaching 85% of internet users monthly. The main video platform is YouTube, which served 2.7 billion videos per month to Greek viewers in 2018. Daily visits to YouTube are the norm among younger audiences. As well as music and entertainment, a wide variety of content is watched on YouTube, including movies and series, news, technology, arts and culture, travel, health and sport. Compared with TV viewers, YouTube users are younger, better educated, more male and more likely to be employed.

17% of internet users watch streaming services from broadcasters, either live or catch-up, and 11% watch video-on-demand services like Netflix or HBO.

According to Consumer Barometer, 59% of viewers watched their most recent online video alone. 67% of TV viewers go online whilst watching TV, and 38% watch online videos at the same time. Viewers generally prefer short videos to longer ones. People watch online video for entertainment and inspiration (47%), relaxation (46%), learning something new (33%) and seeing something that cannot be found elsewhere (23%).

Brands are slowly developing their online video capabilities; they are less likely to simply reuse television ads online, and more likely to create dedicated online content, but there is still room for improvement.

Video ads are expected to further develop in the next few years, across multiple platforms, as consumers become more receptive to this format.

Mobile advertising in Greece is still at a preliminary stage, except for technology, fashion and e-shop brands. Both brand teams and creative agencies need education about mobile consumption habits and developing mobile-first content.

Hungary

Advertising expenditure (HUF million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	47,723.0	32,078.0	15,028.0	285.0	-
2013	45,629.0	40,332.0	18,149.0	503.0	-
2014	50,024.0	48,188.0	20,962.0	1,225.0	-
2015	51,600.0	54,831.0	23,243.0	1,965.0	-
2016	56,033.0	67,145.0	28,967.0	2,169.0	-
2017	60,232.0	78,257.0	34,196.0	2,436.0	-
2018	60,742.0	89,300.0	39,100.0	3,992.0	-
2019	63,088.0	99,918.0	43,792.0	5,788.4	-
2020	68,302.8	109,582.8	48,171.2	6,540.9	-
2021	73,949.9	119,268.7	52,506.6	7,195.0	-

Source: Kantar Media, IAB

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	176.6	118.7	55.6	1.1	-
2013	168.9	149.3	67.2	1.9	-
2014	185.1	178.3	77.6	4.5	-
2015	191.0	202.9	86.0	7.3	-
2016	207.4	248.5	107.2	8.0	-
2017	222.9	289.6	126.6	9.0	-
2018	224.8	330.5	144.7	14.8	-
2019	233.5	369.8	162.1	21.4	-
2020	252.8	405.5	178.3	24.2	-
2021	273.7	441.4	194.3	26.6	-

Source: Kantar Media, IAB

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	7,595	7,530	7,381	7,362	7,360	7,560	7,382	7,389	7,425	7,395
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	1,579	1,564	1,690	1,724	1,810	1,938	2,134	2,369	2,606	2,814

Source: TGI, 15+
Weekly

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	7,680	2,134
Gender (000s)		
Male	3,722	1,103
Female	3,958	1,031
Age (000s)		
15-24	1,025	457
25-34	1,259	493
35-44	1,551	523
45-54	1,356	368
55-64	1,276	198
65+	1,212	95

Source: TGI, 15+

Online video consumption and advertising in Hungary have evolved over the past few years. Though TV is still the most consumed medium in Hungary, with each viewer consuming an average of just under five hours per day, the key Hungarian video providers have begun to shift their focus onto online video. Spend on online video increased by 64% in 2018.

The biggest players in terms of video are still Google and Facebook, which both have massive reach. There are also a number of smaller local providers. RTL, TV2, Viasat and the Hungarian National TV channels have their own TV catch-up platforms; RTL and TV2 have improved their online video offers.

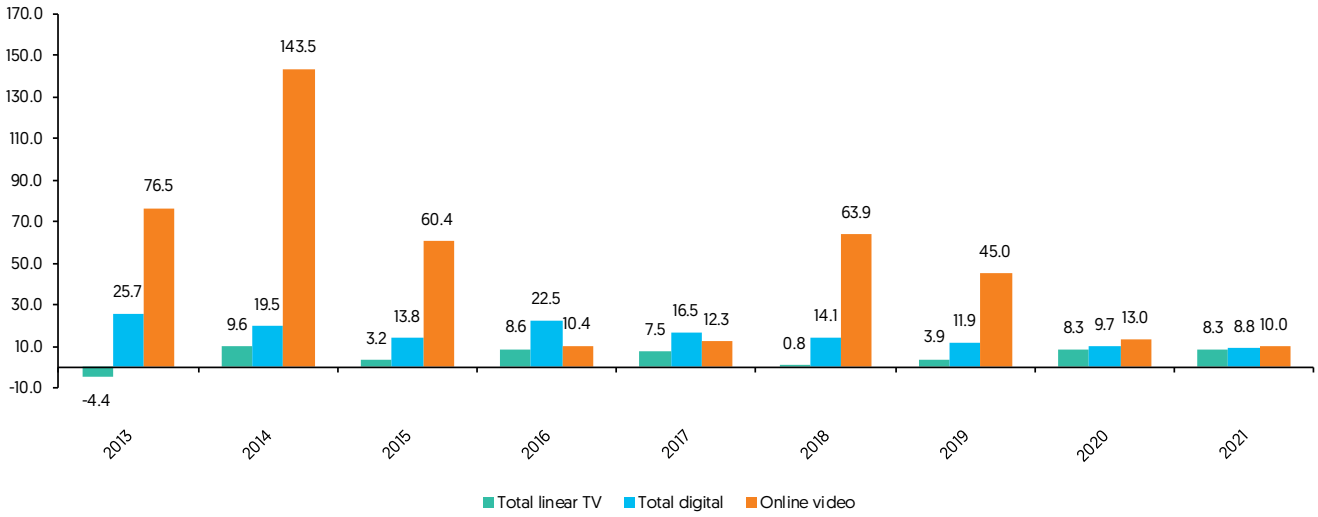
Indavideo (CEMP) and Videa (New Wave Media Group) are the biggest UGC platforms. Videa has moved from the New Wave Media Group to the Evomedia sales house.

Both global and local portals offer a wide range of advertising possibilities:

- Global players with global advertising offers.
- Web TV platforms allow advertising (usually up to 60 seconds) pricing by duration, similar to TV adverts – ads are skippable after 30 seconds.
- Local UGC platforms' limit is 30 seconds, with a number of options for ad-skipping.

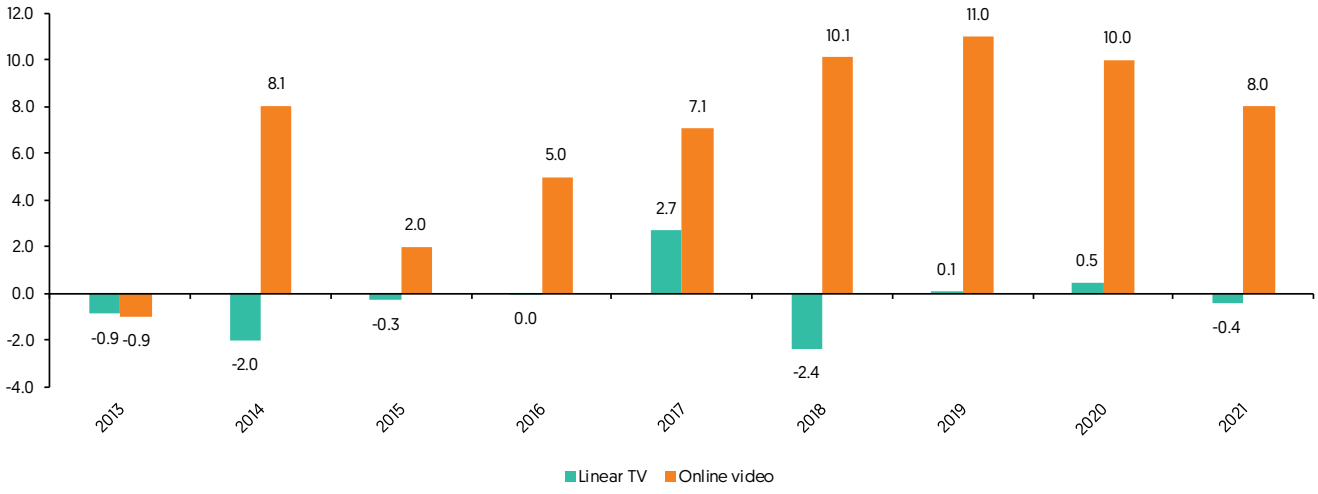
Video advertising in Hungary is predominantly in a pre-roll format.

Advertising expenditure year-on-year growth (%)



Source: Kantar Media, IAB

Regular viewer numbers year-on-year growth (%)



Source: TGI, 15+ Weekly

India

Advertising expenditure (INR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	112,326.5	10,015.6	5,620.8	460.0	175.0
2013	114,645.6	22,034.3	12,365.7	1,371.0	593.0
2014	142,583.8	28,203.9	15,828.0	2,788.0	1,377.0
2015	163,021.2	36,665.1	20,576.5	4,070.0	2,237.0
2016	178,997.2	50,530.3	34,902.3	9,285.0	4,040.4
2017	210,986.9	72,284.5	43,343.4	12,136.2	6,501.5
2018	241,568.7	97,522.7	57,538.4	18,412.3	10,356.9
2019	276,596.2	128,729.9	78,525.2	29,839.6	18,846.1
2020	313,512.7	167,348.9	97,062.3	38,824.9	27,177.5
2021	357,404.4	209,133.9	112,107.0	52,413.7	36,689.6

Source: TAM ADEX DATA, IAMAI, eMarketer, KPMG, exchange4media

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	1,600.1	142.7	80.1	6.6	2.5
2013	1,633.1	313.9	176.1	19.5	8.4
2014	2,031.1	401.8	225.5	39.7	19.6
2015	2,322.2	522.3	293.1	58.0	31.9
2016	2,549.8	719.8	497.2	132.3	57.6
2017	3,005.5	1,029.7	617.4	172.9	92.6
2018	3,441.2	1,389.2	819.6	262.3	147.5
2019	3,940.1	1,833.8	1,118.6	425.1	268.5
2020	4,466.0	2,383.9	1,382.7	553.1	387.1
2021	5,091.2	2,979.1	1,597.0	746.6	522.6

Source: TAM ADEX DATA, IAMAI, eMarketer, KPMG, exchange4media

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s) *	549,602	572,489	602,620	621,118	674,509	779,057	810,160	836,328	858,073	883,815
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s) **	47,000	58,000	72,000	110,000	200,000	216,000	250,000	289,000	323,000	356,000

Source: E&Y, Statistica, BARC
** Weekly ** At least once a month*

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	2.1	3.2	4.4	7.0	19.1	38.5	51.9	82.4	97.9	103.8
Time spent watching online video on mobile devices	0.8	1.4	2.2	4.0	12.4	28.2	39.3	64.3	79.0	84.2
Time spent watching online video on desktop/non-mobile	1.3	1.8	2.2	3.0	6.7	10.3	12.6	18.1	18.9	19.7

Source: GlobalWebIndex, Comscore, Similar web

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	1,350,000	225,000
Gender (000s)		
Male	694,440	135,000
Female	655,560	90,000
Age (000s)		
under 16	181,765	4,500
16-24	278,454	20,250
25-34	293,848	67,500
35-44	219,711	81,000
45-54	161,373	31,500
55-64	120,591	13,500
65+	94,258	6,750
Socioeconomic status (000s)		
ABC1	445,500	-
C2DE	904,500	-
Low	10,549	7,610

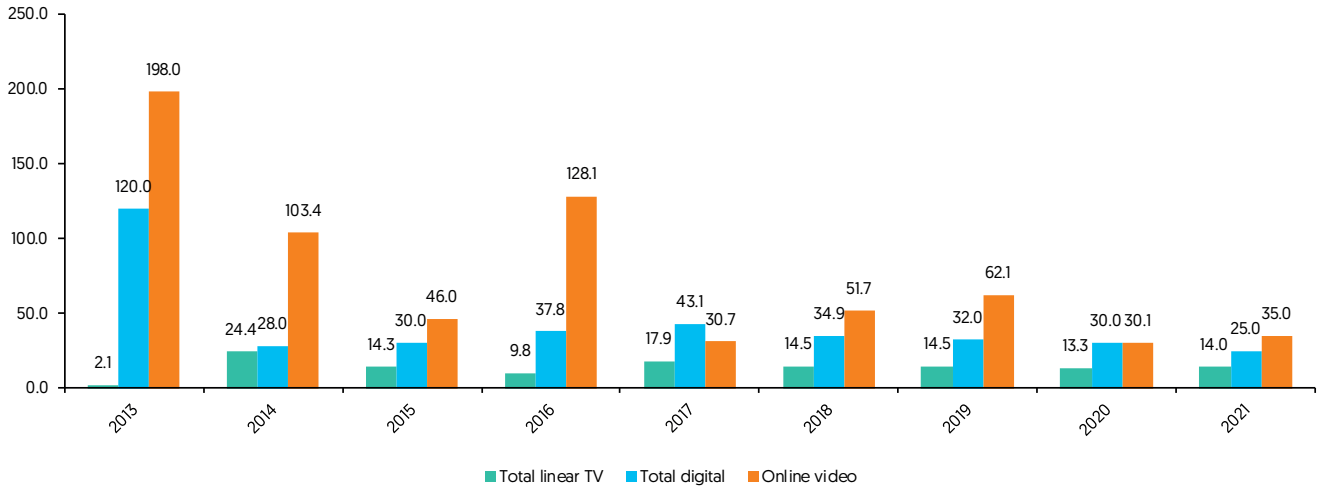
Source: Census data, TGI, E&Y, Facebook

The main video platform in India is YouTube. In terms of demographics, viewers are typically aged 18+. All types of content are viewed, except web original.

Digital continues to outperform the total ad market, and is expected to register 32% growth this year. Within digital, online video is expected to be up by 62% and mobile video by an impressive 82%.

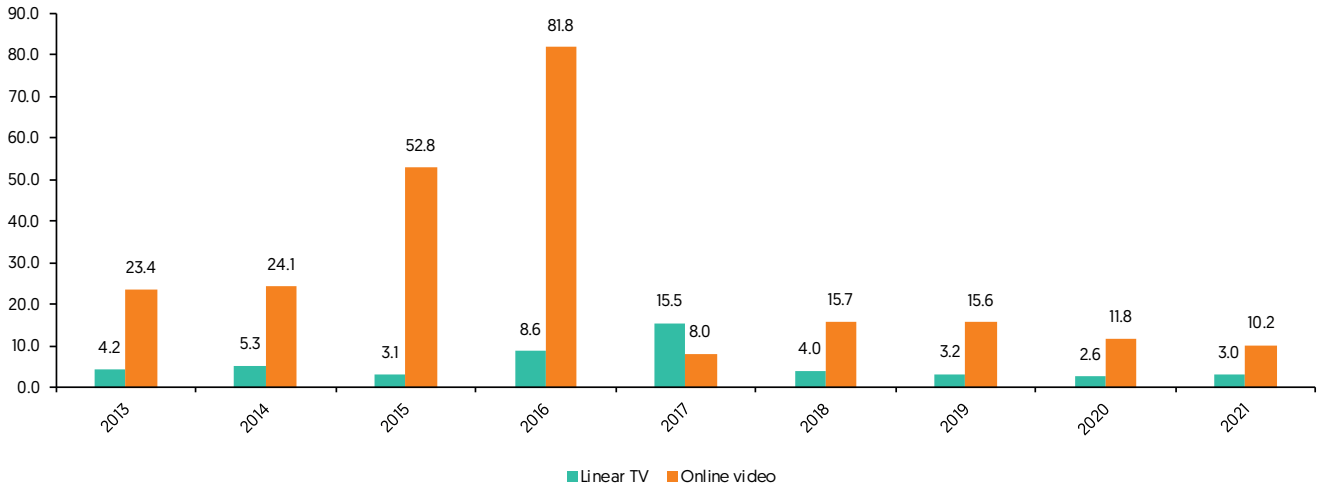
Ad formats in India include pre-rolls and mid-rolls.

Advertising expenditure year-on-year growth (%)



Source: TAM ADEX DATA, IAMAI, eMarketer, KPMG, exchange4media

Regular viewer numbers year-on-year growth (%)



Source: E&Y, Statistica, BARC
Weekly (Linear TV)/At least once a month (Online video)

Ireland

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	215.0	155.5	-	-	-
2013	205.3	172.4	-	-	-
2014	217.6	229.2	87.1	14.0	-
2015	228.9	282.3	112.7	24.0	-
2016	237.1	362.2	159.2	47.0	-
2017	219.1	453.1	218.4	48.0	-
2018	221.3	486.2	238.2	63.3	-
2019	214.9	522.0	266.2	79.8	-
2020	217.0	572.0	286.0	91.8	-
2021	219.7	609.0	304.5	101.0	-

Source: Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	254.0	183.7	-	-	-
2013	242.6	203.7	-	-	-
2014	257.1	270.8	102.8	16.5	-
2015	270.4	333.5	133.1	28.4	-
2016	280.1	427.9	188.0	55.5	-
2017	258.9	535.3	258.0	56.7	-
2018	261.5	574.4	281.5	74.8	-
2019	253.9	616.7	314.5	94.3	-
2020	256.4	675.8	337.9	108.4	-
2021	259.6	719.5	359.8	119.3	-

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	4,019	3,986	4,000	3,999	3,972	4,007	3,900	3,800	3,750	3,700
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)**	-	-	-	2,679	2,820	2,922	2,964	3,085	3,157	3,239

Source: Core Media, Zenith
**Monthly **Last six months*

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	22.7	36.9	35.1	40.7	43.0	47.0	52.1	53.9	58.5
Time spent watching online video on mobile devices	-	5.2	14.7	16.0	21.7	27.0	33.0	37.8	42.2	48.1
Time spent watching online video on desktop/non-mobile	-	17.5	22.2	19.1	19.0	16.0	14.0	14.3	11.7	10.4

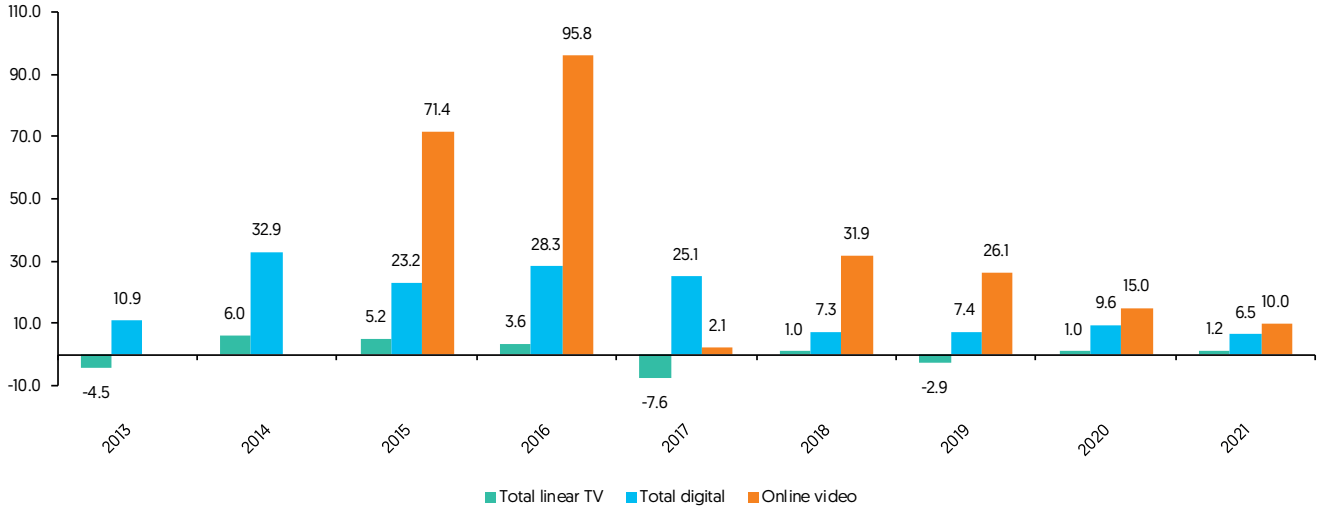
Source: Core Media, Zenith

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	42.0	44.0	58.0	69.0	74.0	78.0	80.0
Average proportion of online video ads that are fraudulent	-	-	-	-	-	-	1.0	1.0	1.0	1.0

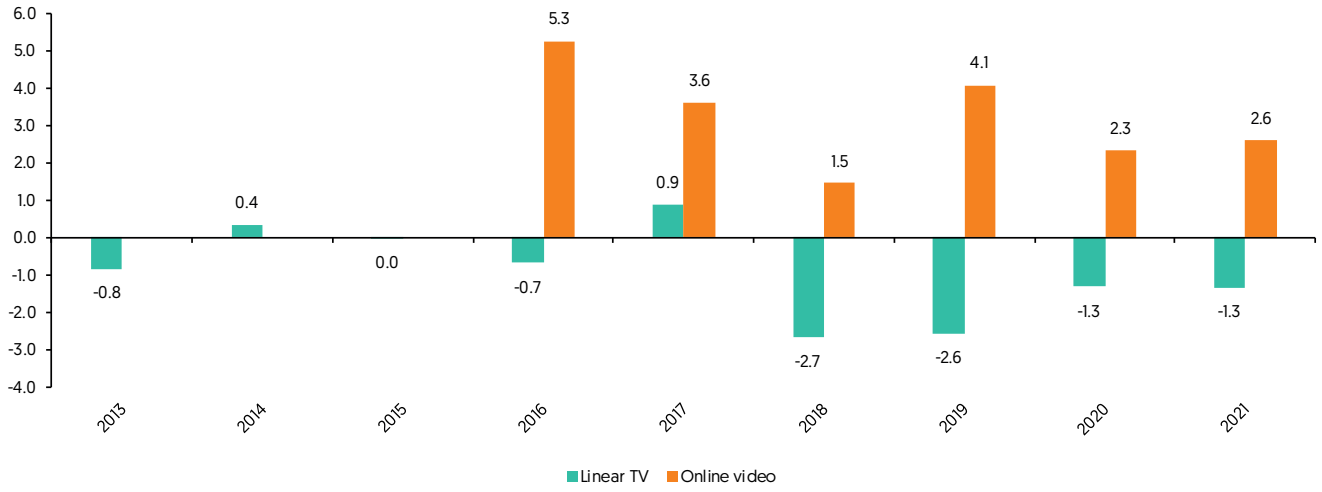
Source: Core Media, Zenith

Advertising expenditure year-on-year growth (%)



Source: Zenith

Regular viewer numbers year-on-year growth (%)



Source: Core Media, Zenith
Monthly (Linear TV)/Last six months (Online video)

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video*	Mobile video*
2012	3,620	1,438	708	140	8
2013	3,258	1,587	845	221	13
2014	3,242	1,709	914	241	23
2015	3,262	1,838	1,007	275	32
2016	3,437	1,983	1,115	345	152
2017	3,381	2,178	1,254	396	202
2018	3,402	2,489	1,500	457	260
2019	3,375	2,646	1,641	516	320
2020	3,471	2,823	1,803	601	378
2021	3,473	3,004	1,968	682	443

Source: Zenith
** Includes video on social media*

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	4,276	1,699	836	165	9
2013	3,850	1,875	998	262	15
2014	3,830	2,020	1,080	285	27
2015	3,853	2,171	1,190	325	37
2016	4,061	2,342	1,318	408	179
2017	3,995	2,573	1,481	467	238
2018	4,019	2,941	1,772	539	307
2019	3,987	3,126	1,939	610	378
2020	4,100	3,335	2,130	710	447
2021	4,103	3,549	2,325	806	524

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	58,063	58,353	57,202	56,061	54,800	54,765	55,758	55,765	55,487	55,263
Number of regular connected TV viewers (000s)	-	-	-	-	-	7,440	9,360	11,280	12,960	14,880
Number of regular online video viewers (000s)	20,791	22,477	23,531	24,059	25,257	27,872	36,377	37,832	38,589	39,360

Source: Auditel. A new methodlogy for monitoring online video viewers was introduced in 2018, after which figures are not compatible with earlier figures.
Monthly

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	3.2	3.5	3.7	4.1	5.1	5.7	11.7	13.6	16.3	19.6
Time spent watching online video on mobile devices	1.5	1.8	2.0	2.5	3.6	4.6	8.3	10.2	12.8	15.7
Time spent watching online video on desktop/non-mobile	1.7	1.7	1.6	1.6	1.4	1.1	3.4	3.4	3.5	3.9

Source: Auditel. A new methodlogy for monitoring online video viewing was introduced in 2018, after which figures are not compatible with earlier figures.

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	-	-	-	72.0	67.0	-	-
Average proportion of online video ads that are fraudulent	-	-	-	-	-	-	9.5	9.6	9.8	10.0

Source: Meetrics, IAS

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	21,860	17,051
Gender (000s)		
Male	10,539	8,039
Female	11,321	9,012
Age (000s)		
under 16	1,500	1,216
16-24	4,787	4,241
25-34	4,560	3,887
35-44	3,637	3,023
45-54	3,067	2,372
55-64	2,526	1,571
65+	1,785	742
Socioeconomic status		
High	4,601	3,973
Medium	6,710	5,468
Low	10,549	7,610

Source: TGI January - December 2018 (Kantar Ibope Media)

Online video attracts 36.3 million unique users per month, reaching 61% of the total population and 86% of internet users. The online video audience continues to grow, boosted by viewing on mobile devices, which accounted for 71% of viewing in 2018.

YouTube is the leading video platform, followed by Netflix, Mediaset Play, Vimeo and La Repubblica TV. The last is a video channel embedded in a news website, proving that online news users are happy to switch between text and video content according to topic. In 2018, DAZN entered the Italian market, offering a type of content – premium sport – that was not previously available online..

According to Audiweb, online video viewing is highest among 18-34 year-olds, but also strong among 35-54 year-olds. Desktop video viewers are more likely to be male, and mobile viewers are more likely to be female.

Online video viewers choose between short or long-form video according to the platform and the time of day. Short-form video is typically enjoyed on social media throughout the day, while long-form video is typically viewed on specialist platforms in the evening.

In 2018, Instagram TV (IGTV) launched in Italy, offering a new type of mobile video to users, who can watch vertical, long videos made by people they follow, without leaving the social network. Facebook has also launched its Watch platform in Italy.

There has recently been strong growth in demand for SVOD (Subscription Video On Demand). Free monthly trials are an important marketing tool – 60% use them to test the service before subscribing.

In-stream video accounts for 60% of total video advertising online, 75% of which is unskippable. Pre-roll is undoubtedly the most-used video format by the Italian advertisers; however, the available inventory is becoming ever more limited, as growing demand requires more and more video content to embed advertising within. The arrival of long-form video within social media may enlarge this kind of inventory.

Media owners offer a variety of out-stream placements, most commonly In-Banner Video, In-Article Video and In-Feed Social Video.

Video viewability rates are decreasing in Italy, although they are higher than the European average, at 67% in 2019 compared to 54%..

The industry is working to address brand safety and ad fraud as brands invest more in programmatic, where these problems are more frequent. A few players in Italy are developing applications using blockchain technology to make programmatic trading more transparent.

In-stream ads are the most-used formats for generating brand awareness, especially in combination with TV campaigns. Out-stream ads, in particular in social media, are particularly effective at storytelling and generating user engagement. The development of more engaging video formats (like 360° or vertical videos) will increase advertising effectiveness among mobile users. The audiences of TV and online video are complementary, with different age groups predominant in each, and while TV is the most important component of video viewing, digital video viewing is rising fast.

In 2018, 18% of total digital advertising expenditure in Italy was devoted to video advertising, with a value of €457 million, up 15% year on year. The growth of video advertising has mainly been driven by social and programmatic platforms. Online video is often used to generate incremental reach among users who are watching less TV, but now brands are making greater use of online video's storytelling abilities, and driving sales through call-to-action integrated formats in social media.

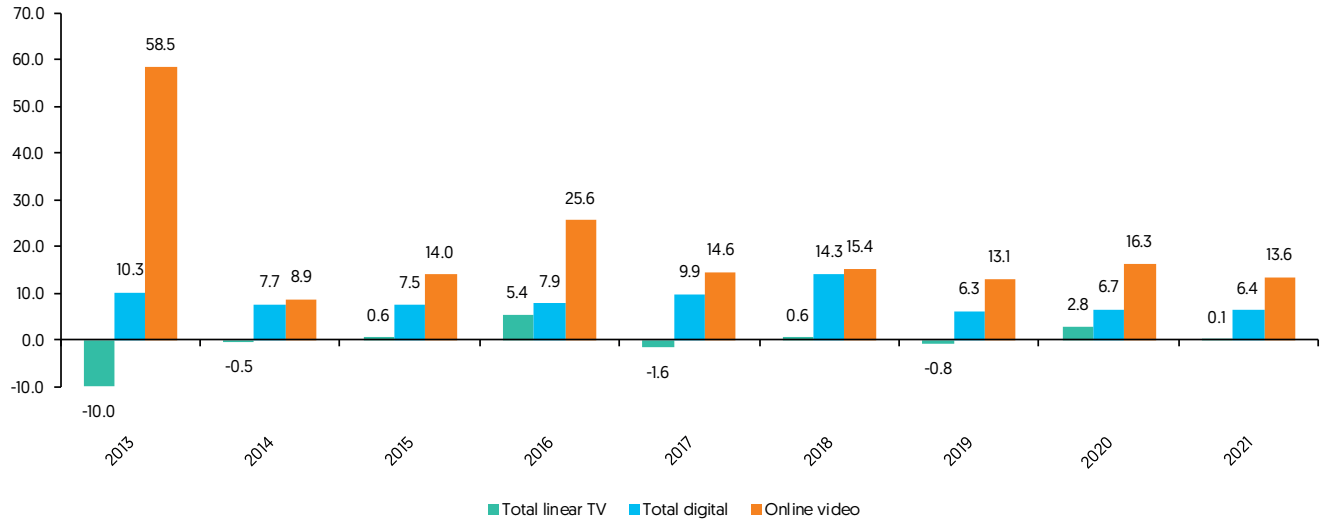
TV is becoming Addressable TV. This allows the delivery of different ads to people who are watching the same TV programme, based on user profiling. Expenditure on Addressable TV has already reached 2.5% of total television adspend, and is expected to reach 4.0% in 2021.

In the near future, YouTube and Facebook will remain the main platforms for video advertising, but as brands become ever more sensitive to brand-safety issues they will demand premium inventory environments and measurable online activities. Video on social networks will continue to grow, thanks to new video format placements in Social Stories channels (Facebook Stories are now following the successful example set by Instagram). Mobile video is one of the fastest growing formats, and will benefit from the improved quality of ad formats, such as Vertical Video. Video lengths will vary according to the platform used, but media owners will be more attuned to the user experience (YouTube has stopped using non-skippable pre-roll except the 6" spot, for example). 5G will enable the spread of Virtual Reality environments that may lead to new innovative opportunities for video online advertising.

Owned video will evolve as advertisers collaborate with influencers to build closer relationships with users through storytelling that emphasises brand assets. In particular, younger audiences spend more time watching owned content than professional content on some platforms. Beauty, food and travel are the three most popular categories, thanks to the authenticity of their content.

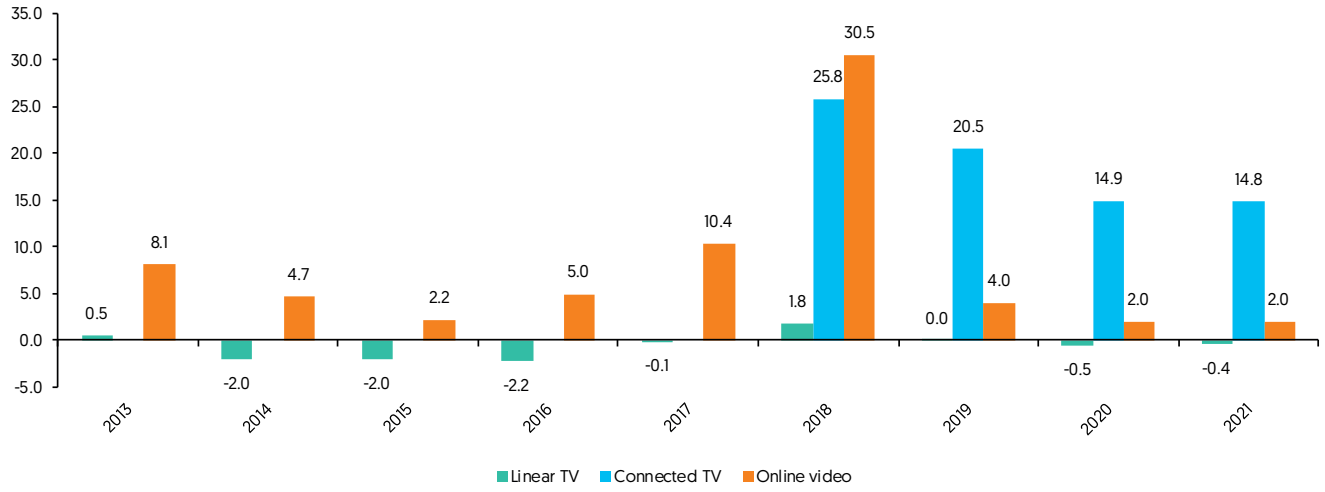
TV broadcasters are constantly renewing their online services to improve their customers' experiences. Free-to-air programmes are available on Smart TV and mobile devices, with on-demand and ad hoc content.

Advertising expenditure year-on-year growth (%)



Source: Zenith
** Includes video on social media*

Regular viewer numbers year-on-year growth (%)



Source: Auditel. A new methodlogy for monitoring online video viewers was introduced in 2018, after which figures are not compatible with earlier figures. Monthly

Kazakhstan

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	169.7	11.7	11.0	0.7	-
2013	181.0	15.2	10.6	1.0	-
2014	154.8	19.0	12.5	2.0	0.01
2015	119.7	19.6	13.3	2.9	0.02
2016	69.2	15.7	10.8	2.0	0.04
2017	78.7	17.7	11.8	3.1	0.2
2018	84.3	18.4	13.0	3.8	0.4
2019	82.4	20.2	14.9	4.9	1.9
2020	84.3	24.3	16.5	5.8	2.6
2021	89.1	29.6	17.3	6.3	3.7

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	4,938	5,208	4,909	5,000	5,075	4,948	4,685	4,601	4,532	4,396
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	-	1,378	1,820	2,352	3,190	3,186	3,349	3,430	3,472

Source: TNS CA, InfoSys TV, MMI, all 15+
Weekly

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	50.0	50.0	50.0	75.0	81.0	75.0	75.0	75.0
Average proportion of online video ads that are fraudulent	-	-	20.0	20.0	10.0	10.0	5.0	3.0	2.0	1.0

Source: Zenith

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	6,272	3,708
Gender (000s)		
Male	2,831	1,690
Female	3,441	2,018
Age (000s)		
under 16	94	65
16-24	1,024	778
25-34	1,653	1,182
35-44	1,161	729
45-54	976	539
55-64	738	294
65+	626	122
Socioeconomic status (000s)		
AB	924	617
CDE	5,348	3,090

Source: TNS CA, MMI, all 15+

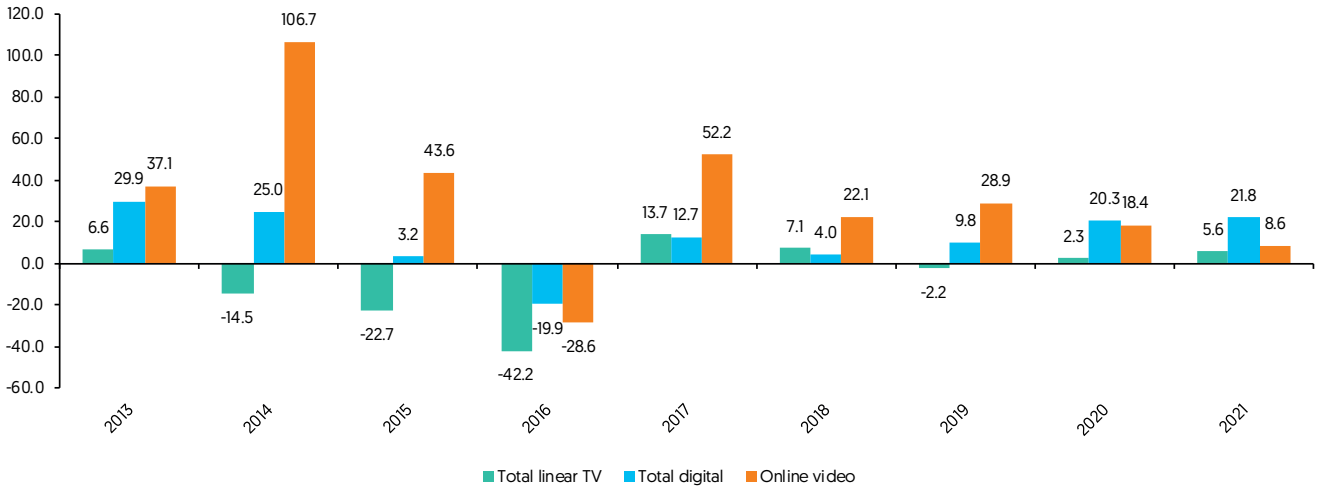
The top video platforms in Kazakhstan are YouTube and Instagram. Online video is most heavily used by those aged between 16 and 25, living in Almaty and Nur-Sultan (previously known as Astana). Mostly, people watch short-form UGC content and re-broadcasts from the national TV channels.

Looking at mobile-based online video viewing, it is important to focus on vertical videos/content, and keep up to date with the latest trends.

The types of advertising embedded within content include direct placement – multi-rolls and bumpers – and, to a lesser extent, product placement/overviews. Pre-rolls and bumpers are good for reach and frequency, while in-feed video and Instagram Stories are better for user engagement.

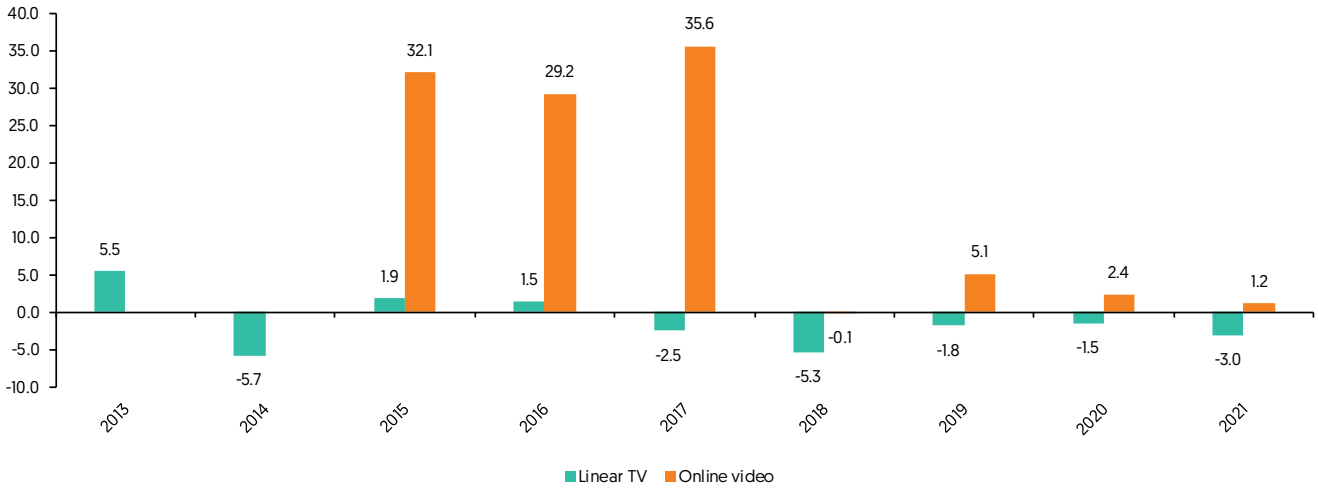
Viewability, brand safety and fraud are not measured widely, with only a few big players on board at the moment.

Advertising expenditure year-on-year growth (%)



Source: Zenith

Regular viewer numbers year-on-year growth (%)



Source: TNS CA, InfoSys TV, MMI, all 15+ Weekly

Latvia

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	1,398	1,339	1,350	1,346	1,316	1,269	1,260	1,235	1,216	1,210
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	552	663	-	827	901	1,002	1,043	1,095	1,139	1,185

Source: KANTAR TNS Media Day, KANTAR TNS Atlas/Spring 2018 Weekly

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	1,592	1,043
Gender (000s)		
Male	767	562
Female	825	481
Age (000s)		
under 16	12	12
16-24	186	175
25-34	316	275
35-44	283	218
45-54	297	187
55-64	261	118
65+	237	59
Socioeconomic status (000s)		
AB	477	354
CDE	569	400
FG	539	284

Source: KANTAR TNS Atlas/Spring 2018

YouTube is the top online video platform in terms of reach and audience targeting, followed by Facebook and Instagram. TvPlay is the leading local video platform, with a monthly audience of around 280,000-320,000. For Russian-speaking audiences the most popular platform is AdVideo Network, with a monthly reach of 540,000; AdVideo presents a great opportunity to reach the Russian-speaking audience, but there are concerns around possible brand safety violations because of the various other networks it features (Megogo.net, Rutube.ru etc.), which are hard to control.

Local media news portals, such as Delfi Tv, Tvnet Video and LSM (the digital platform of the state broadcaster), are growing rapidly, but still only take a very small share because of the small amount of inventory available (approximately 10,000 impressions daily for pre-roll). Niche portals (for example, sportacentrs.com) also take a very small share, but offer the opportunity to reach specific audiences.

VoD platforms show a variety of content, including original local TV shows, entertainment, news and sport. Owned video is being used for posting on social media and YouTube channels.

Users of online video tend to be: young, aged 15-40 years old; mostly male (73.5% of men use online video compared to 58.8% of women); live in cities; have a higher education; and are employed or a student.

Embedded within the content, ad formats include linear video ads, with the possibility to buy pre-, mid- or post-roll, although some offer an all-roll option only. Other popular formats:

- Skins (that cover the space around the video player), which can be bought in a synchronized mode, so that wallpaper appears together with a pre-roll video.
- Pause banner – a static image ad that appears when video is paused.
- In-video or reveal video – a video ad that appears between the text paragraphs if the text is long enough. Video appears without sound.
- Video skins.
- In-banner video.

In general, online video is used for awareness or reach campaigns. In programmatic buying (social, YouTube), video can be used for conversion campaigns as well as there are options to change buying strategies, and advanced options for conversion tracking and optimization.

The use of online video by advertisers depends on many factors, like budgets and the target group that the advertiser is aiming for. Larger brands with bigger budgets are still mostly going for traditional TV, using online video mostly as a complementary medium. Smaller brands on the other hand are choosing to use online video because of the costs, but it still depends on the type of product that is being advertised and the target group. Yearly TV inflation, along with increasing consumption of online media, means that it is only a matter of time, however, before there is a shift from traditional TV to online video.

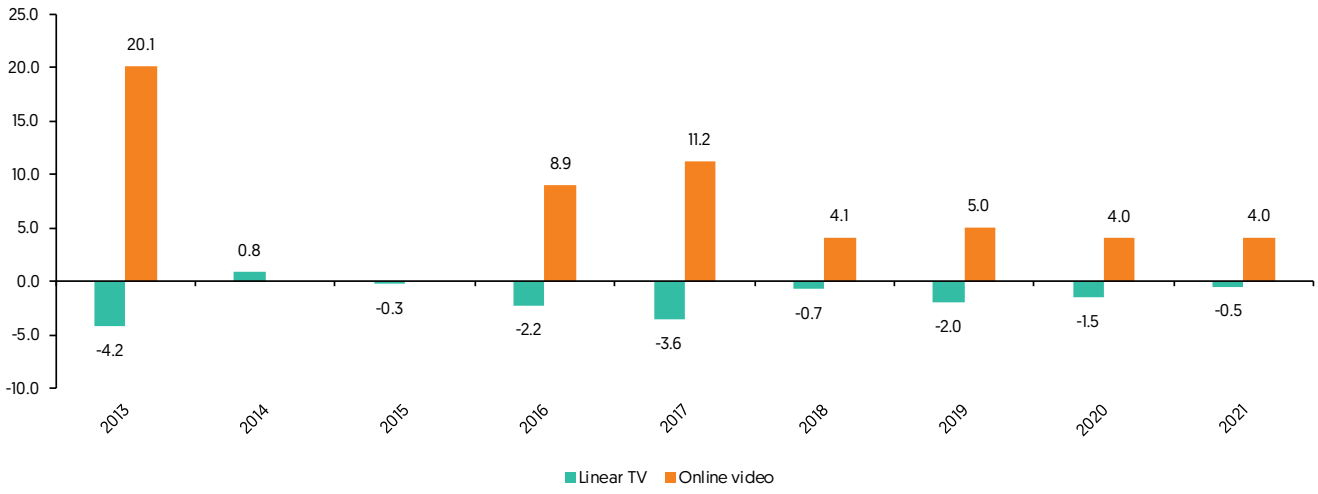
The steady increase of internet speed has dramatically increased internet's popularity and daily use, especially on mobiles. Yet the production of audiovisual ads often remains the main problem, and the lack of video content excludes many options for VoD placements. This problem affects mostly local clients, as they tend to have smaller budgets for production and shift priorities towards display formats. One option is to use an existing television ad without any adaptation for online video, which is very rarely a good solution. The situation is better with global clients as material is produced globally and only localization is necessary. The quality of these for online platforms tends to be much better as well.

Clients tend to follow trends, and media channels are trying to offer them new and interesting video solutions, but it is not a priority for local clients at the moment.

For mobile-based online video viewing, it is clear that advertisers must adapt their creatives. Media channels already allow the upload of vertical formats for ads that will be watched on mobile devices. But as with the problem mentioned above, financial resources are required for adaptation to various formats.

Average viewability for VoD platforms is high (around 97%); Facebook and YouTube ads are not served via third parties, so we do not have information regarding these platforms. To assure brand safety for our clients, various security measures are taken when setting up the campaigns in Google Ads. We choose to cooperate only with trusted partners (for example, TvPlay and other local media). Third party verification services are used.

Regular viewer numbers year-on-year growth (%)



Source: KANTAR TNS Media Day, KANTAR TNS Atlas/Spring 2018 Weekly

Lithuania

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	47.5	13.1	11.0	0.5	0.1
2013	46.9	18.8	13.0	0.8	0.1
2014	45.8	23.5	16.1	1.6	0.2
2015	46.1	34.0	20.4	2.3	0.9
2016	48.7	50.0	26.0	3.4	2.2
2017	50.0	58.4	30.4	4.3	2.9
2018	51.6	66.6	32.7	4.6	3.2
2019	53.8	73.1	35.8	4.8	3.3
2020	54.8	79.5	38.9	5.6	3.8
2021	55.3	78.5	34.9	6.5	4.4

Source: TNS Gallup, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	56.1	15.5	13.0	0.6	0.1
2013	55.4	22.2	15.3	0.9	0.1
2014	54.1	27.7	19.0	1.9	0.3
2015	54.5	40.2	24.1	2.7	1.1
2016	57.5	59.1	30.7	4.1	2.5
2017	59.1	69.0	35.9	5.1	3.4
2018	61.0	78.7	38.6	5.4	3.7
2019	63.6	86.3	42.3	5.7	3.9
2020	64.7	93.9	46.0	6.6	4.5
2021	65.3	92.8	41.3	7.7	5.3

Source: TNS Gallup, Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	2,161	2,009	1,881	1,803	1,818	1,840	1,811	1,719	1,820	1,830
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	406	386	476	488	483	539	539	592	640	690

Source: Instar, Kantar Daily

Demographics

	General population	Online video viewers
	2019	2019
Total (000s)	2,085	592
Gender (000s)		
Male	993	352
Female	1,092	241
Age (000s)		
16-24	265	169
25-34	380	151
35-44	364	104
45-54	400	94
55-64	374	61
65+	302	13
Average monthly income in € (000s)		
Up to 250	318	68
251-400	496	112
401-750	525	176
More than 750	272	89
Did not indicate	473	148

Source: Kantar

YouTube remains the most popular video platform, with a 61% weekly reach among internet users in 2019. Local video platforms are less popular, but their reach is growing: Delfi TV has increased by nine percentage points, Lrytas TV by eight, and Tvplay.lt by six compared to 2018.

16-34 year-olds, inhabitants of larger cities, people with higher income and men are the heaviest users of online video.

Videos of up to three minutes in length are most popular, and live broadcasts of sports matches (particularly basketball and football) attract large audiences.

In-stream video works best for brand awareness, particularly within video-on-demand content that's viewed with the sound on. Out-stream formats are usually played with sound-off and require higher frequency and video adaptation (with surtitles or subtitles) to achieve the same effect.

Viewability, brand safety and fraud are not big issues in Lithuania yet. Third-party tools like IAS, MOAT and Campaign Manager usually show less than 1% non-human impressions. Viewability for video-on-demand is relatively high – at 70%-90% – because ads are non-skippable and aired prior to content valuable for the user. Measurement of viewability for out-stream formats suffers from technical limitations on the publishers' side. Hence these formats are less popular.

Online video is gradually growing. More advertisers use it to extend their TV campaigns. The actual share of their budgets that they devote to online video depends on the target audience for the particular product or service on offer, since it has a much higher reach among young audiences.

VOD advertising is becoming more common among advertisers, especially if they already have video clips for TV campaigns. Brands now see it as natural to support their TV campaigns with VOD. VOD provides a better user experience, allowing consumers to find more information, participate in a contest or even buy something with just one click after seeing the ad. Web portals are investing in their VOD content.

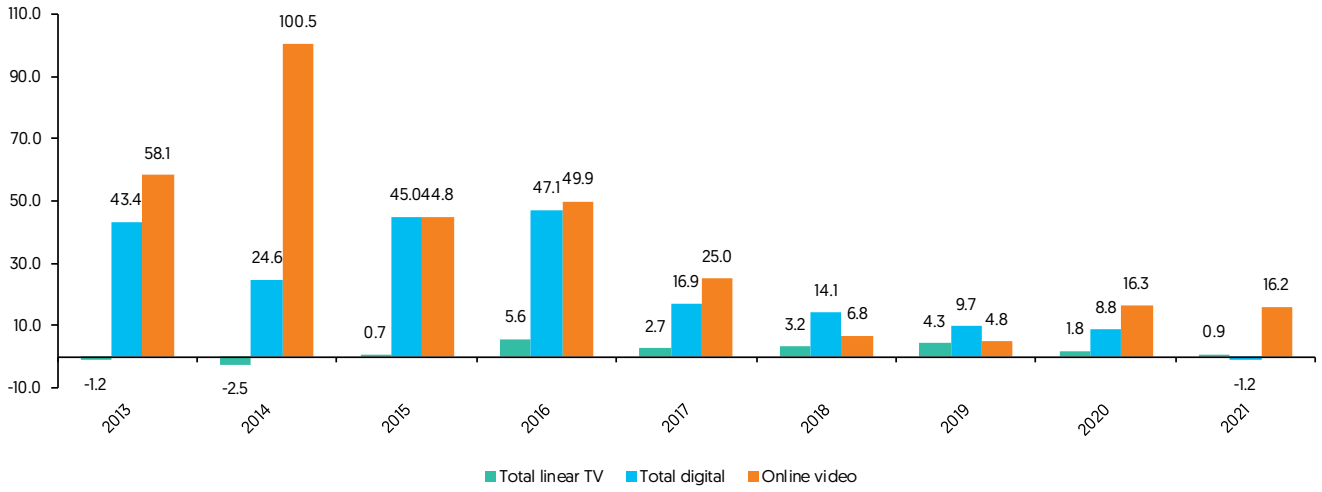
As programmatic buying grows, media agencies and clients are looking to buy VOD programmatically, and the biggest networks are starting to supply some other of their VOD inventory through programmatic buying platforms.

Dynamic creative has been available for a while in display, and is now coming to video as well. It has not yet caught on much with local brands, but will increase in popularity over time.

Owned video is not very popular in Lithuania. Some brands have YouTube video channels and some of those videos are used on YouTube advertising.

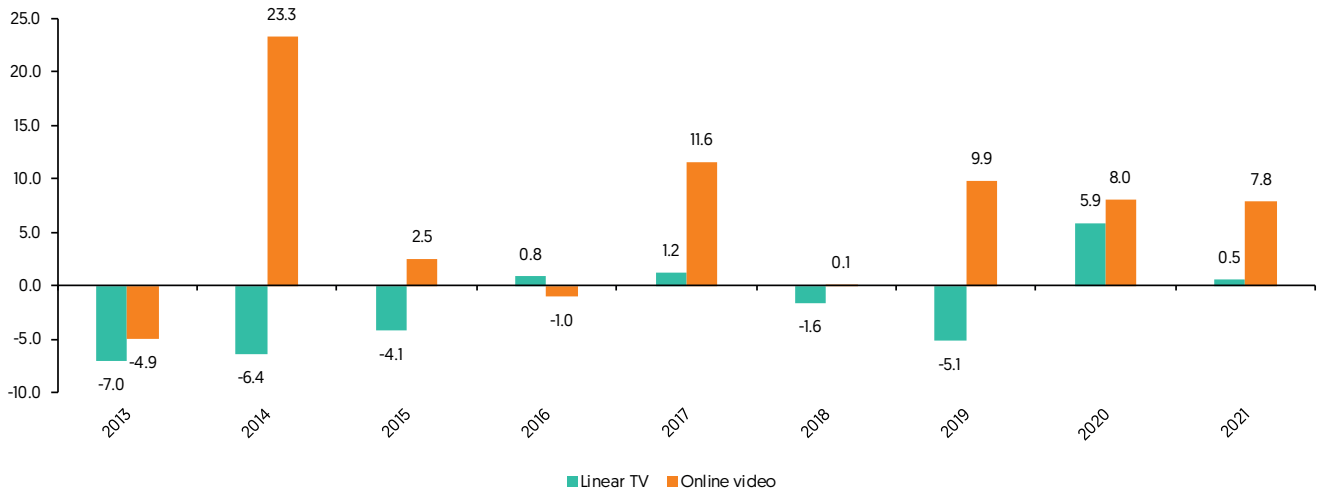
As in all of Western Europe, the importance of mobile is growing. Around 25% of video stream views on local platforms are on mobile devices. For global platforms like YouTube and Facebook, mobile accounts for 60%-70% of video impressions. We expect mobile video to continue to grow, but so too will Smart TV consumption. The future of video is multichannel, combining traditional TV, online video via mobile, tablet, desktop, and connected TV.

Advertising expenditure year-on-year growth (%)



Source: TNS Gallup, Zenith

Regular viewer numbers year-on-year growth (%)



Source: Instar, Kantar Daily

Mexico

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	22,643	26,197	27,801	27,127	28,881	42,023	61,047	64,994	69,196	73,669

Source: GlobalWebIndex, Zenith
Daily, weekly or monthly

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	-	-	35.8	79.8	90.3	101.9	112.9
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source:

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	-	61,047
Gender (000s)		
Male	-	30,486
Female	-	30,561
Age (000s)		
16-24	-	20,807
25-34	-	17,041
35-44	-	13,578
45-54	-	6,286
55-64	-	3,335

Source: GlobalWebIndex

The most important video platform in Mexico is YouTube with more than 59 million visits, followed by Netflix with 15 million in a month. Claro Video and Blim are Mexican platforms with 4.1 million visits in a month.

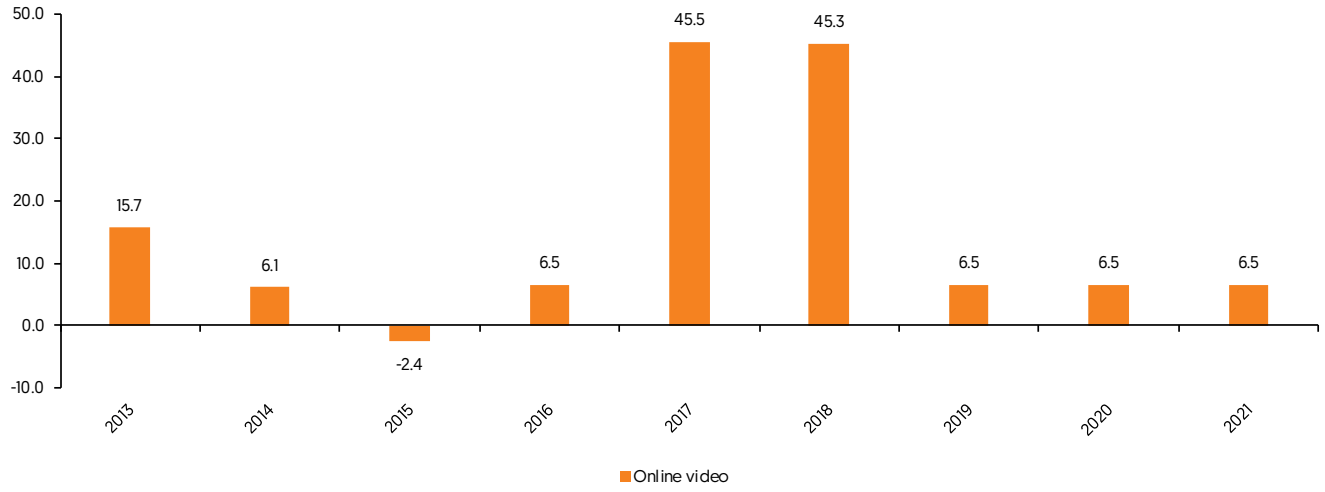
The average Mexican OTT consumer spends 13 hours a week watching Netflix. Its main users are young people aged 19-45 years.

Mexicans prefer music videos as their first choice of video content (44%), followed by user-generated video (34%), humour (33%), movies (26%) and tutorials (27%).

Ads are commonly pre-roll or mid-roll.

One big problem in the digital industry is that there's no panel that can measure the results from all channels, so it's difficult to measure performance using a consistent methodology.

Regular viewer numbers year-on-year growth (%)



Source: GlobalWebIndex, Zenith
Daily, weekly or monthly

Moldova

Advertising expenditure (MDL million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	221.6	19.4	18.7	2.8	0.9
2013	248.1	29.6	26.9	5.9	1.9
2014	269.8	38.8	38.8	10.5	3.9
2015	259.1	56.4	56.4	19.7	8.5
2016	253.0	72.8	72.8	30.6	12.4
2017	256.2	79.1	79.1	37.2	15.8
2018	269.0	91.3	95.0	57.0	23.7
2019	287.8	109.2	109.2	73.2	32.8
2020	302.2	125.6	120.1	87.7	39.6
2021	317.3	144.4	135.6	100.9	51.5

Source: AAPM, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	13.2	1.2	1.1	0.2	0.1
2013	14.8	1.8	1.6	0.4	0.1
2014	16.1	2.3	2.3	0.6	0.2
2015	15.4	3.4	3.4	1.2	0.5
2016	15.1	4.3	4.3	1.8	0.7
2017	15.2	4.7	4.7	2.2	0.9
2018	16.0	5.4	5.7	3.4	1.4
2019	17.1	6.5	6.5	4.4	2.0
2020	18.0	7.5	7.2	5.2	2.4
2021	18.9	8.6	8.1	6.0	3.1

Source: AAPM, Zenith

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	-	-	-	-	92	95	95
Average proportion of online video ads that are fraudulent	-	-	-	-	-	-	-	-	-	-

Source: MOAT, Zenith

In Moldova the main video platforms are YouTube, local news sites, streaming platforms and social media. 61% of the online video audience is between 16 and 24 years old, with an equal distribution by gender.

The most popular video content is short-form videos on YouTube and social media.

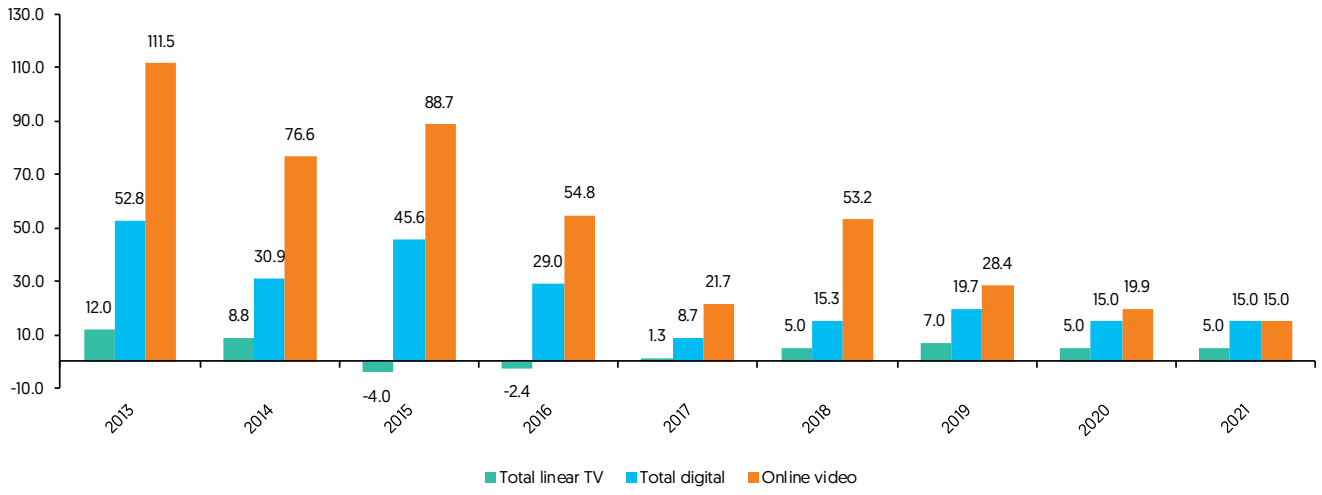
The ad formats used by most brands vary by platform. In social media, NewsFeed Video, In-Stream Ads and Stories are most common. TrueView ads are most common on YouTube, while Allroll Ads are favoured on streaming platforms and local news sites. In-Text Ads are also used in the latter.

As on YouTube, local news sites and streaming platforms are most effective for awareness purposes, while social media ads are best for driving traffic. Click-through rates are highest for News Feed Ads and Stories.

Most advertisers use the same message across all media, and employ online video to add incremental reach to TV (adding 10% to 15% to weekly reach, and 20%-25% for a whole campaign). Demand for online video inventory is rising, and platforms are struggling to produce enough content to supply it.

Mobile video is becoming more important for consumers and advertisers. To attain sufficient reach and engagement among mobile users, brands will need to adapt their video ads for the mobile environment.

Advertising expenditure year-on-year growth (%)



Source: AAPM, Zenith

Netherlands

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	962	1,158	476	-	-
2013	933	1,255	520	57.0	-
2014	964	1,397	582	76.0	-
2015	987	1,491	606	98.0	-
2016	991	1,649	649	123.0	-
2017	940	1,784	685	177.0	-
2018	910	2,067	817	216.0	-
2019	901	2,317	898	242.0	-
2020	890	2,579	979	277.0	-
2021	863	2,680	1,030	320.0	-

Source: Nielsen, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	1,137	1,368	562	-	-
2013	1,102	1,483	614	67.3	-
2014	1,139	1,650	688	89.8	-
2015	1,166	1,762	716	115.8	-
2016	1,171	1,948	767	145.3	-
2017	1,111	2,108	809	209.1	-
2018	1,075	2,442	965	255.2	-
2019	1,064	2,737	1,061	285.9	-
2020	1,051	3,046	1,157	327.3	-
2021	1,020	3,166	1,217	378.1	-

Source: Nielsen, Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	10,923	10,934	10,920	10,685	10,509	10,254	10,124	10,575	10,416	10,260
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	3,736	4,079	4,413	4,730
Number of regular online video viewers (000s)	-	-	-	-	5,763	6,398	7,544	7,548	7,550	7,552

Source: Advantedge/NPDM
Watch sometimes or often

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	22	36	39	44	51	54	63	67	71	75
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: GlobalWebIndex

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	-	-	-	-	-	-	-
Average proportion of online video ads that are fraudulent	0.99	0.99	0.99	0.99	0.99	0.99	0.99	0.99	0.99	0.99

Source: Zenith

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	14,565	7,548
Gender (000s)		
Male	7,201	4,108
Female	7,364	3,440
Age (000s)		
under 16	608	456
16-24	1,883	1,616
25-34	2,112	1,686
35-44	2,089	1,326
45-54	2,562	1,209
55-64	2,258	718
65+	3,053	537
Socioeconomic status (000s)		
AB1	6,619	3,815
B2CD	7,946	3,733

Source: NPDM

YouTube is the main video platform in the Netherlands, followed by Netflix and the traditional television broadcasters. The types of video most watched on YouTube are music videos, tutorials/how-to videos and trailers.

Online video viewers are more likely than the general population to be between 18 and 34 years and highly educated.

YouTube shows both short-form and long-form video, mostly original to the web. Netflix and the broadcasters mainly offer long-form content: TV programmes, or fragments of TV programmes, that can be watched on demand.

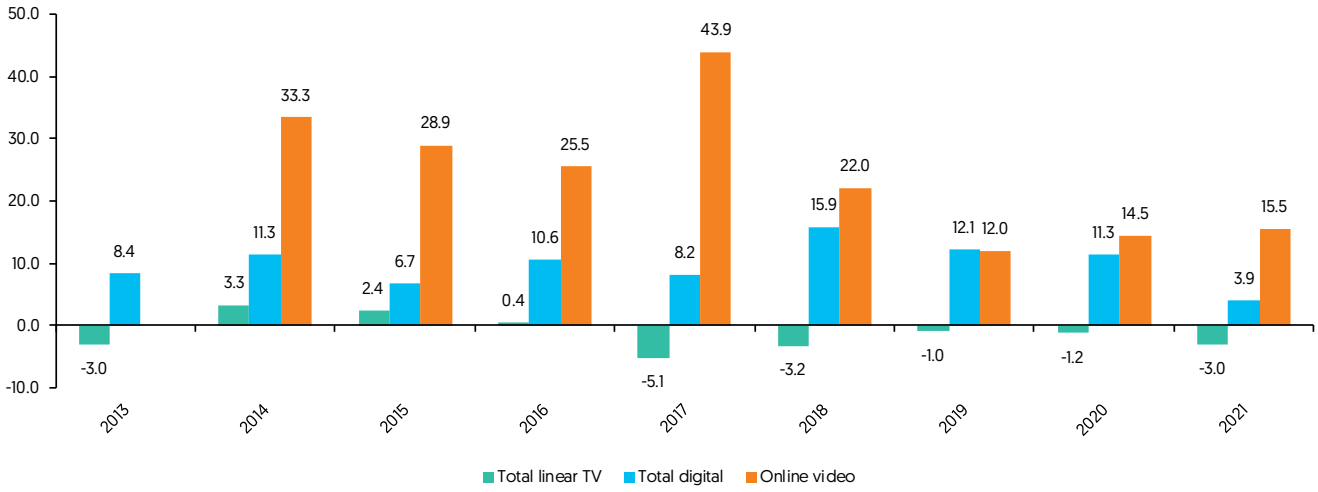
Advertisers running video advertising are using more and more interactive elements in their video ads.

The length of online video ads is of great importance. Although the recent trend has been towards shorter ads, in the belief that they are more powerful, very short videos have no room for delivering a message. The most important thing about a video is, and remains, relevance. Being relevant and responding to the audiences' needs makes an ad appealing. New technology that creates interactive experiences promises to make online video even more engaging.

Advertisers generally tend to combine television and online video, using the latter to add additional reach, mainly among younger audiences, using either a short edit of the television spot or creative specially tailored to digital devices and their capabilities.

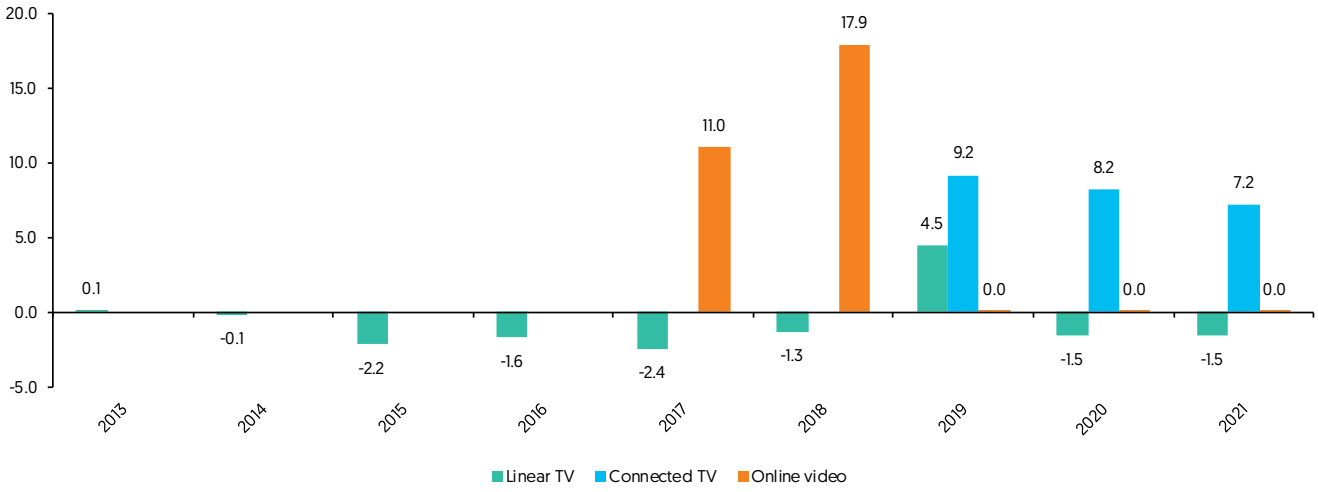
More Dutch people are using their smartphones to watch TV programmes – their numbers now equalling tablet viewers. YouTube, Netflix and Ziggo Go are the content apps most often frequently found on smartphones and tablets.

Advertising expenditure year-on-year growth (%)



Source: Nielsen, Zenith

Regular viewer numbers year-on-year growth (%)



Source: Advantedge/NPDM
Watch sometimes or often

New Zealand

Advertising expenditure (NZD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	614.0	365.9	113.8	12.2	-
2013	634.0	471.0	136.2	17.2	-
2014	614.0	589.4	139.7	26.2	-
2015	589.0	694.0	167.3	29.2	-
2016	580.0	870.0	194.1	31.0	-
2017	591.0	785.0	180.6	34.0	-
2018	587.0	903.0	180.0	39.4	-
2019	575.0	993.0	184.0	45.4	-
2020	557.0	1,072.0	186.0	52.2	-
2021	546.0	1,179.0	186.0	60.0	-

Source: ASA, IAB PWC, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	425.5	253.6	78.9	8.4	-
2013	439.3	326.4	94.4	11.9	-
2014	425.5	408.4	96.8	18.2	-
2015	408.1	480.9	115.9	20.3	-
2016	401.9	602.9	134.5	21.5	-
2017	409.5	544.0	125.1	23.6	-
2018	406.8	625.7	124.7	27.3	-
2019	398.4	688.1	127.5	31.4	-
2020	386.0	742.8	128.9	36.1	-
2021	378.4	817.0	128.9	41.6	-

Source: ASA, IAB PWC, Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	3,147	3,012	2,960	2,856	2,901	2,843	2,711	2,643	2,577	2,513
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	-	1,159	1,275	1,788	1,931	2,341	2,575	2,704	2,839

Source: Nielsen, Zenith Daily

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	24.0	28.5	40.0	47.0	60.0	69.0	75.9	83.5
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

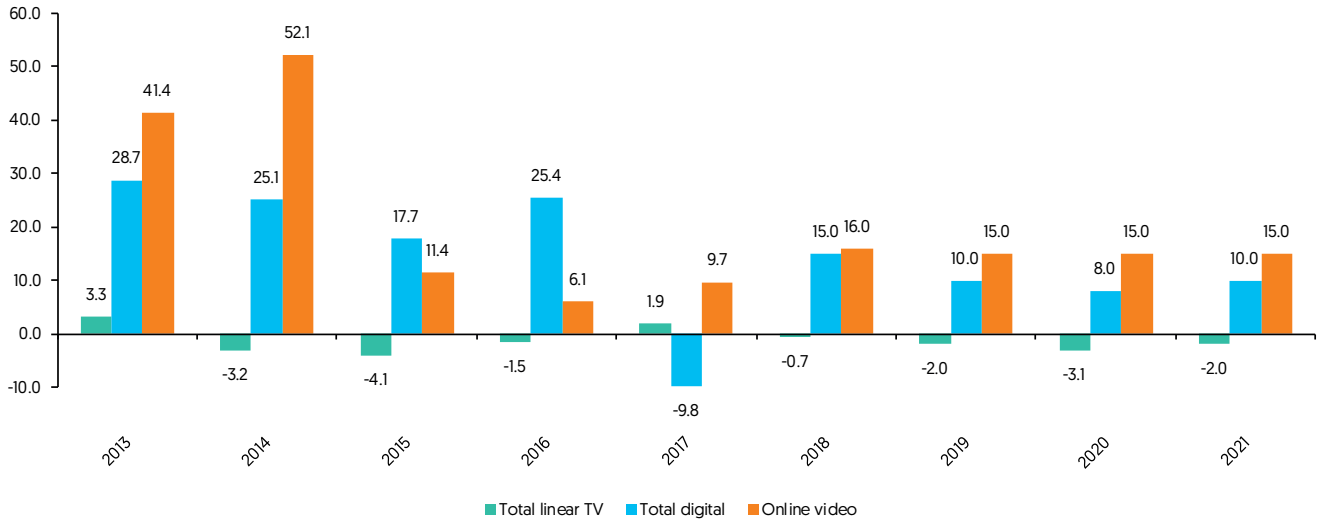
Source: Nielsen, Zenith

Online video adspend grew 16% to reach NZ$39 million in 2018. As video inventory and audiences continue to rise, video adspend will continue to grow at double-digit rates.

Experiencing video content through digital channels is rapidly becoming the norm, even among old audiences. This will come to a head in September 2019 when the nation tunes in to the Rugby World Cup through a live stream. While the streamed event is offered at a nominal subscription by the NZ telecoms operator Spark, a backup is on hand through the national broadcaster TVNZ, which will provide some games for free. This will be a true test of Spark's streaming platform, which could in the future support advertising.

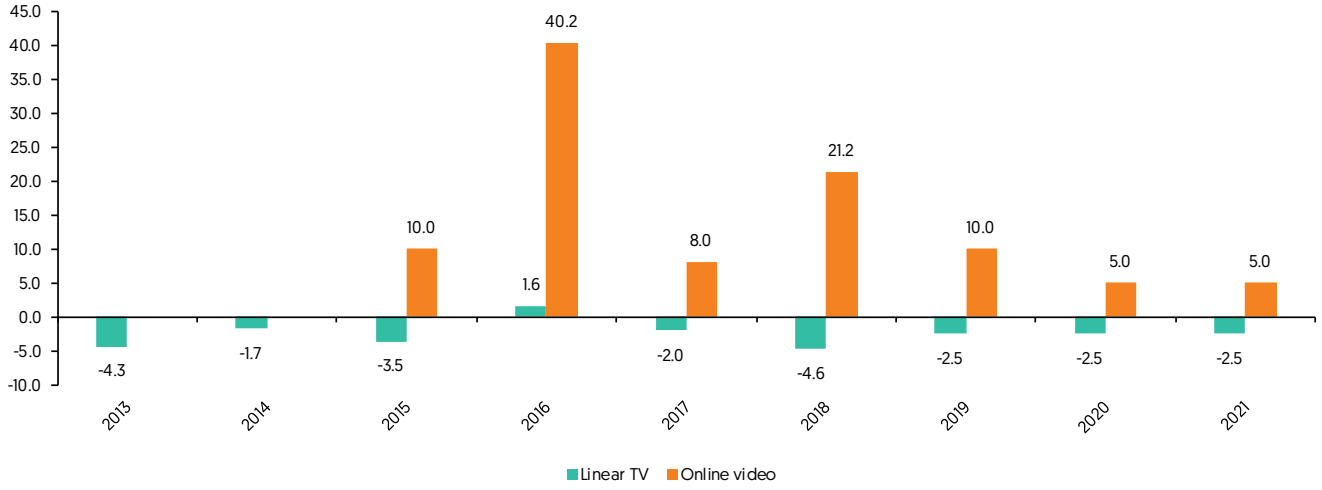
While the growth of digital video is propelled by the uptake of high speed fibre and connected TVs in NZ homes, the looming roll out of 5G will accelerate the use of mobile devices for viewing video content. Marketers will continue to be challenged to create video content which is optimised to both big and small screens to communicate effectively.

Advertising expenditure year-on-year growth (%)



Source: ASA, IAB PWC, Zenith

Regular viewer numbers year-on-year growth (%)



Source: Nielsen, Zenith Daily

Norway

Advertising expenditure (NOK million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	3,623.0	4,803.0	1,754.0	-	-
2013	3,829.0	5,564.0	2,269.0	143.0	-
2014	3,829.0	6,015.0	2,585.0	245.0	-
2015	3,858.0	7,513.0	2,723.0	307.0	-
2016	3,941.0	7,931.0	3,602.0	355.0	-
2017	3,971.1	9,108.0	4,138.7	384.3	-
2018	3,785.0	10,050.0	5,158.0	464.0	-
2019	3,552.2	10,606.0	5,729.4	493.6	-
2020	3,347.9	11,453.5	6,328.1	530.2	-
2021	3,111.8	12,252.6	6,980.5	572.6	-

Source: MBL, IRM, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	445.5	590.6	215.7	-	-
2013	470.8	684.2	279.0	17.6	-
2014	470.8	739.6	317.9	30.1	-
2015	474.4	923.8	334.8	37.7	-
2016	484.6	975.2	442.9	43.7	-
2017	488.3	1,120.0	508.9	47.3	-
2018	465.4	1,235.8	634.2	57.1	-
2019	436.8	1,304.1	704.5	60.7	-
2020	411.7	1,408.4	778.1	65.2	-
2021	382.6	1,506.6	858.3	70.4	-

Source: MBL, IRM, Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	3,596	3,568	3,769	3,849	3,809	3,778	3,662	3,627	3,553	3,487
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	-	-	-	-	-	1,274	1,513	-	-

Source: Gallup TV-meter (2012-2017), Kantar TVOV (2018)
Monthly

Demographics

	General population	Online video viewers
	2019	2019
Total (000s)	4,437	2,619
Gender (000s)		
Male	2,261	1,305
Female	2,175	1,314
Age (000s)		
under 16	389	239
16-24	587	383
25-34	731	512
35-44	702	511
45-54	739	433
55-64	618	298
65+	672	243

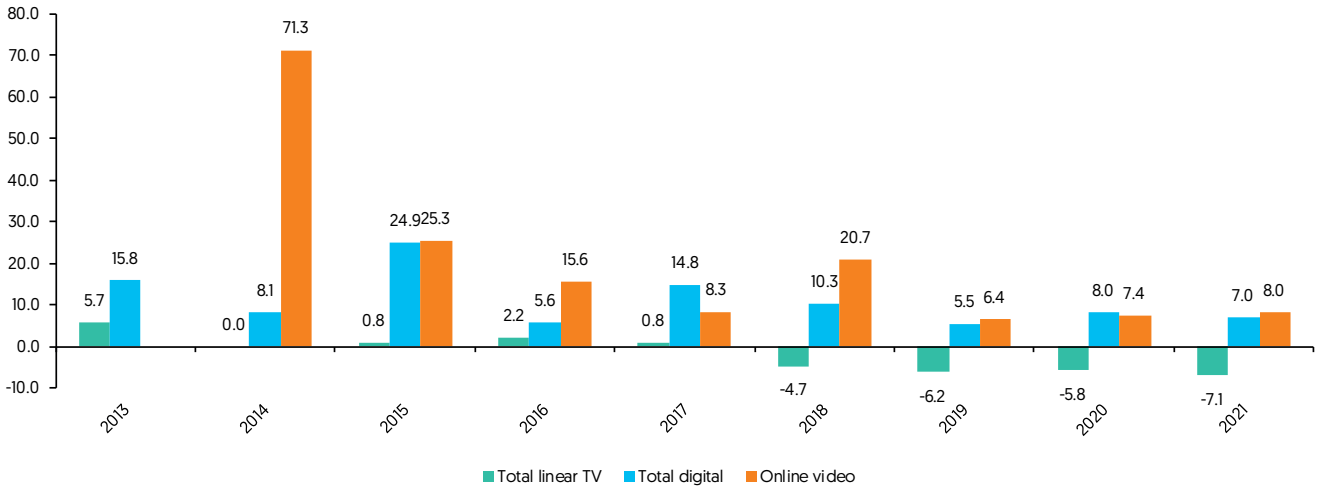
Source: Kantar TVOV

The online video market grew by 21% to NOK 464 million in 2018. People mainly use: YouTube - 39% state they use the platform daily (source: Rikets Medietilstand-Gallup); NRK (state channel/non-commercial); short-form content on large newspaper web-TV platforms, such as VGTV, DBTV and APTV; and long-form content on TV stations' streaming platforms Viafree, Dplay and TV 2 Sumo.

More and more advertisers use OLV in addition to traditional TV buys in order to reach target audiences that no longer watch linear TV. However, challenges exist in that vendors cannot deliver the same number of advertising minutes online as they are able to do on traditional TV. This means that, as more and more people shift to online platforms, broadcasters will not have the same potential for income, which again may affect the product they sell.

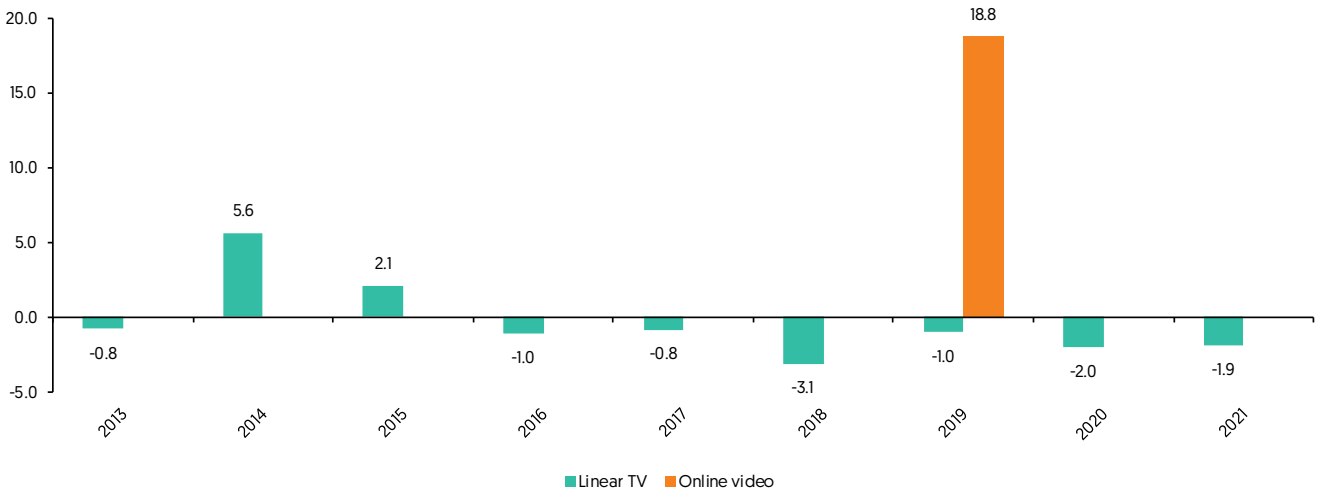
Advertising exposures are delivered as pre-, mid- and post rolls depending on the platform. On TV stations' platforms, exposures are delivered as part of longer ad breaks.

Advertising expenditure year-on-year growth (%)



Source: MBL, IRM, Zenith

Regular viewer numbers year-on-year growth (%)



Source: Gallup TV-meter (2012-2017), Kantar TVOV (2018)
Monthly

Peru

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	359.0	37.0	16.7	1.1	0.4
2013	391.0	44.0	20.2	2.6	1.3
2014	406.0	66.0	22.6	4.0	0.9
2015	385.0	77.0	26.6	7.2	1.0
2016	399.0	86.0	29.2	8.6	1.3
2017	348.0	96.0	26.9	9.6	1.5
2018	365.0	106.0	24.7	10.8	1.7
2019	383.0	119.0	22.7	12.0	2.0
2020	402.0	130.0	23.4	12.4	2.0
2021	422.0	141.0	24.4	13.0	2.1

Source: CPI, IAB, Publicis One

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	6,917	6,919	7,016	7,076	7,655	7,783	8,016	8,257	8,422	8,506
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)**	1,325	1,416	2,277	2,545	3,243	5,429	6,243	7,180	7,898	8,490

Source: TGI Lima
** Last 7 days ** Last 30 days*

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	18.6	22.2	25.6	30.7	35.3	40.5	45.0	47.0

Source: Comscore

Demographics

	General population	Online video viewers
	2017	2017
Total (000s)	31,826	5,429
Gender (000s)		
Male	15,939	2,768
Female	15,887	2,661
Age (000s)		
under 16	9,217	458
16-24	5,145	1,490
25-34	5,200	1,361
35-44	4,375	1,012
45-54	3,366	673
55-64	2,327	303
65+	2,196	132
Socioeconomic status		
AB	8,275	1,611
C	13,685	2,589
DE	9,866	1,228

Source: Genaral Population of Peru, INEI, TGI
** TGI, Lima only, viewers of YouTube in last 30 days*

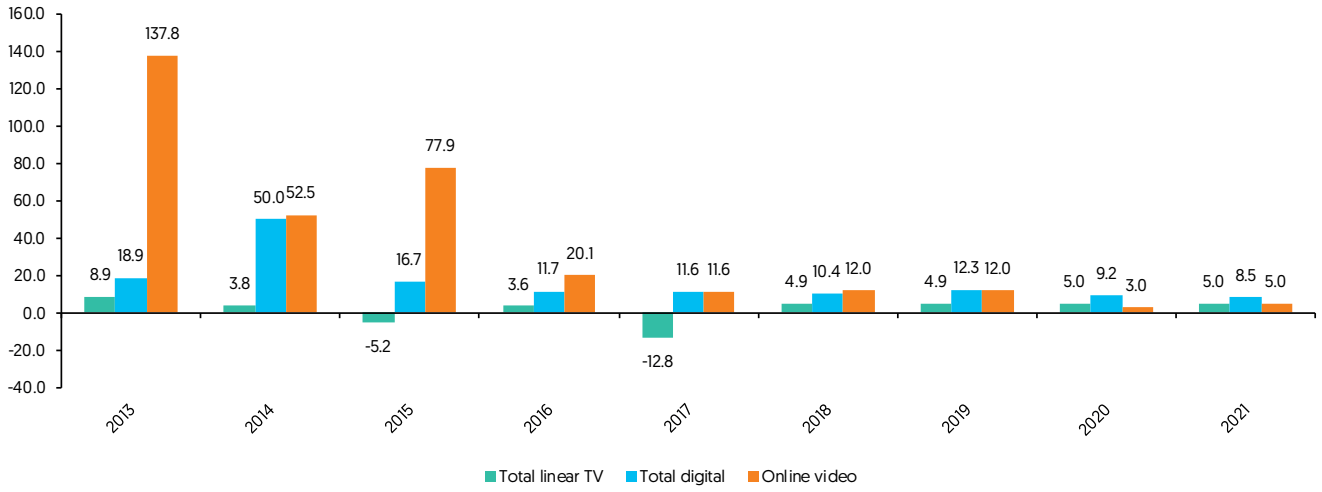
The principal online video platforms in Peru are YouTube, Teads, Facebook and various newspaper video services. Online video is most popular among 15-34 year-olds.

Content includes the rebroadcasting of TV shows, TV ads, music, tutorials and original content (from YouTubers). The type of advertising embedded within the content includes pre-roll, in video (banners), contextual, and mobile (app, standard banners, vertical video, etc.). Vertical video and Facebook/Instagram Vertical videos with mobile/YouTube pre-roll and bumper ads are common as a multiscreen strategy.

Between 5% and 10% of TV spend has been transferred to digital video (not only YouTube, but also to Facebook Video, Teads, video websites and mobile video).

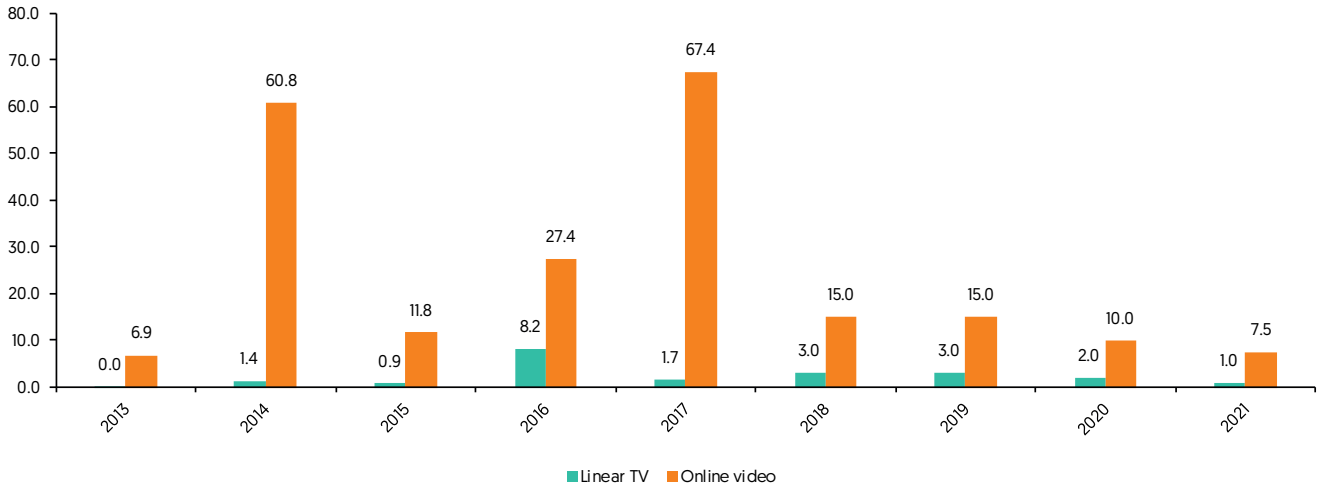
The future of video is mobile, and video must be created specifically for mobile and based on programmatic intelligence.

Advertising expenditure year-on-year growth (%)



Source: CPI, IAB, Publicis One

Regular viewer numbers year-on-year growth (%)



Source: TGI Lima
** Last 7 days ** Last 30 days*

Philippines

Advertising expenditure (PHP million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	50,600	2,500	-	200	-
2013	56,000	3,500	-	420	-
2014	61,103	5,000	-	850	-
2015	65,840	10,050	-	2,312	-
2016	75,436	17,400	-	5,916	-
2017	95,049	32,000	-	14,400	-
2018	84,594	36,000	-	19,080	-
2019	89,669	47,250	-	30,713	-
2020	92,359	59,420	-	40,406	-
2021	96,054	62,100	-	43,470	-

Source: Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	960.9	47.5	-	3.8	-
2013	1,063.4	66.5	-	8.0	-
2014	1,160.3	94.9	-	16.1	-
2015	1,250.3	190.8	-	43.9	-
2016	1,432.5	330.4	-	112.3	-
2017	1,804.9	607.7	-	273.4	-
2018	1,606.4	683.6	-	362.3	-
2019	1,702.8	897.2	-	583.2	-
2020	1,753.8	1,128.3	-	767.3	-
2021	1,824.0	1,179.2	-	825.5	-

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	-	49,910	46,485	47,844	46,232	44,594	47,136	52,132	52,862	52,333
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	10,805	17,941	22,142	29,350	53,104	55,413	54,582	55,455	58,228

Source: Nielsen, Zenith
Monthly

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	83,300	38,793
Gender (000s)		
Male	41,720	19,542
Female	41,580	19,252
Age (000s)		
under 16	24,990	13,999
16-24	15,030	9,343
25-34	13,740	7,714
35-44	11,010	4,271
45-54	8,710	2,243
55-59	3,270	648
60+	6,550	574
Socioeconomic status (000s)		
AB	261	196
CDE	83,039	38,596

Source: Nielsen

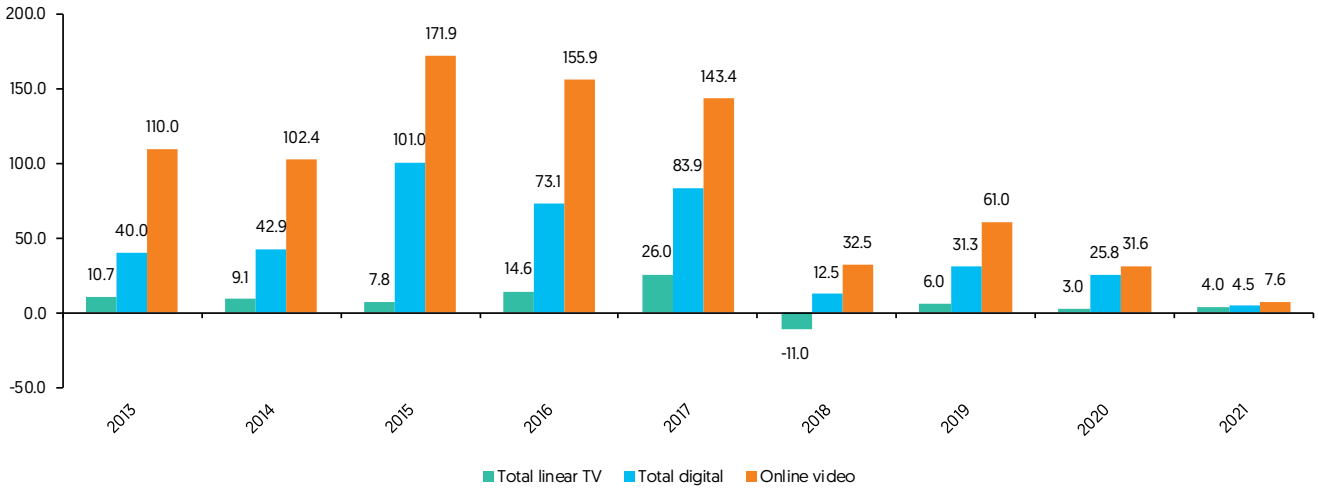
YouTube is the main video platform in this market, with an estimated 35 million impressions daily. Among regular internet users, 89% of millennials, 85% of mothers and 82% of those aged over 35 are YouTube users. 56% of its users watch music videos and concerts, 47% watch how-to videos and 46% watch movies.

The most common ad formats are short pre-roll videos or longer story-telling videos, often extended versions of the 30-second TV spots. The pre-roll ads are particularly good at maximising reach and awareness, and are used to communicate straightforward value propositions or pricing.

Advertisers sometimes ask consumers to submit video entries to a contest that they can then use to extend the life of a campaign and to provide real-life testimonials on how the brand affects consumers' lives.

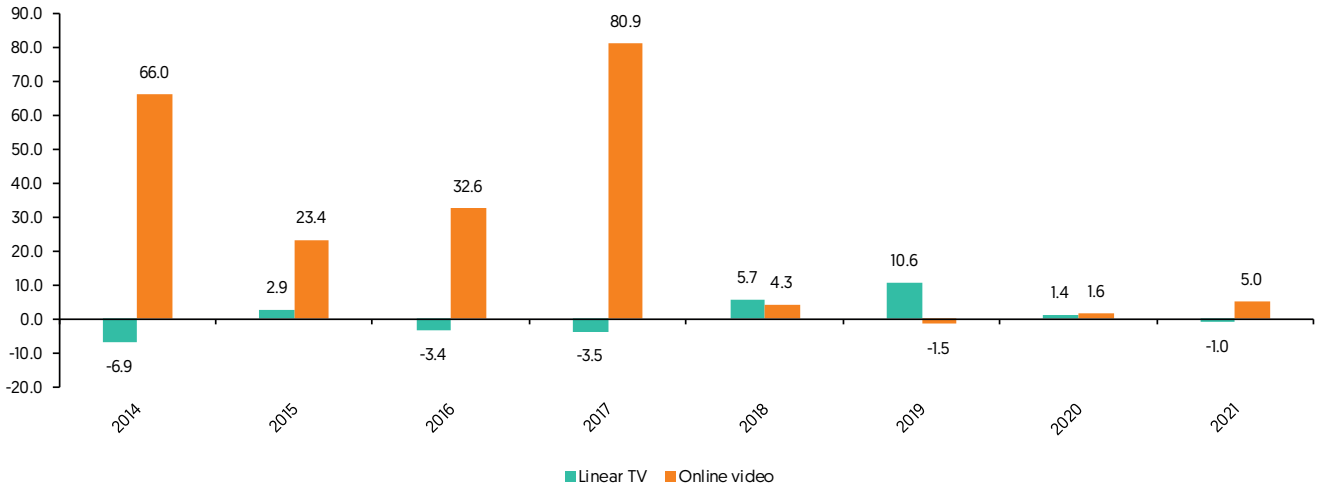
Most video viewing, like most internet use in general, is mobile. The spread of high-speed mobile services has led to growth in the number of subscribers to services like Netflix, HBO GO, Hooq and to local TV content like Iwant TV of ABS CBN TV Network.

Advertising expenditure year-on-year growth (%)



Source: Zenith

Regular viewer numbers year-on-year growth (%)



Source: Nielsen, Zenith Monthly

Poland

Advertising expenditure (PLN million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	3,499	1,211	-	-	-
2013	3,345	1,300	-	-	-
2014	3,446	1,458	-	-	-
2015	3,545	1,614	859	226	43
2016	3,601	1,807	917	285	54
2017	3,619	2,025	1,010	356	97
2018	3,865	2,304	1,086	470	165
2019	3,983	2,582	1,276	560	230
2020	4,128	2,903	1,428	645	297
2021	4,249	3,228	1,585	709	348

Source: Kantar, Nielsen, IGRZ, IAB, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	968.9	335.3	-	-	-
2013	926.2	360.0	-	-	-
2014	954.2	403.7	-	-	-
2015	981.6	446.9	237.9	62.6	11.9
2016	997.1	500.3	254.0	79.1	15.0
2017	1,002.1	560.7	279.7	98.5	26.9
2018	1,070.2	638.1	300.7	130.1	45.5
2019	1,102.9	715.0	353.2	155.1	63.6
2020	1,143.1	803.8	395.4	178.6	82.2
2021	1,176.6	893.8	438.9	196.3	96.4

Source: Kantar, Nielsen, IGRZ, IAB, Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	28,270	28,061	27,864	27,749	27,267	26,619	26,539	25,491	25,473	25,346
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	15,016	17,002	17,983	20,640	22,696	24,346	25,750	26,650	27,250	27,795

Source: TGI, MegaPanel, PBI, Zenith
Monthly

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	24	31	29	34	35	40	49	56	60	65
Time spent watching online video on mobile devices	9	12	11	13	15	18	23	27	30	34
Time spent watching online video on desktop/non-mobile	15	19	18	21	20	22	26	29	30	31

Source: Zenith

The biggest video platform is YouTube, but there are several strong domestic video-on-demand platforms, such as VOD.pl, player.pl, TVP VOD, Ipla, and WP TV. HBO Go, Netflix and Showmax compete for OTT subscribers.

Online video is most popular among 16-44 year-olds, who represent 60% of total viewers. The popularity of online video falls steadily by age.

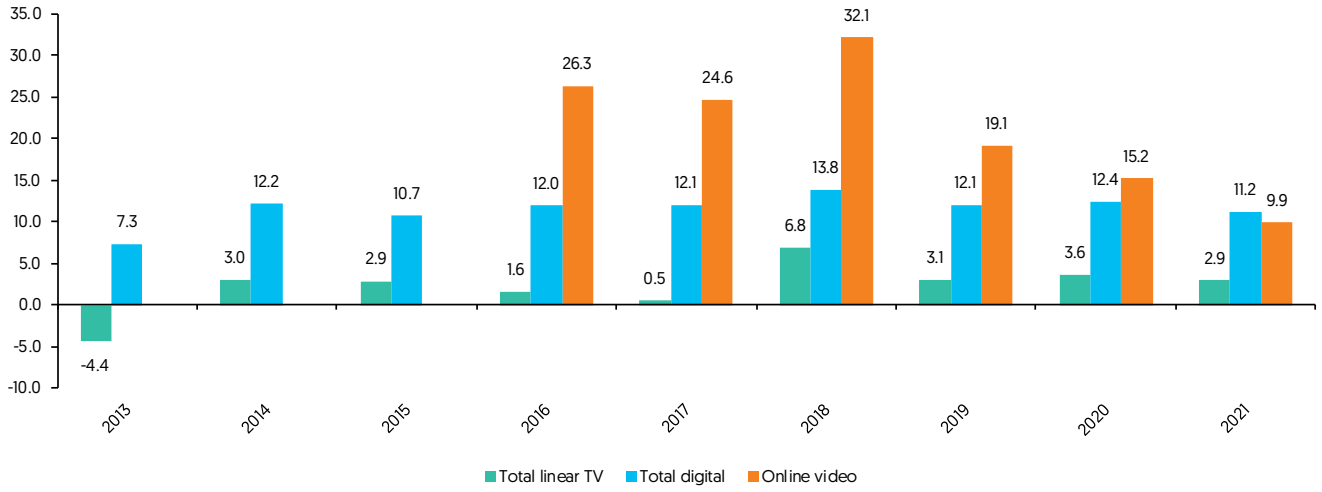
We expect online video advertising will grow by 19% this year, and will account for 22% of total internet adspend.

As well as standard formats such as pre-roll and mid-roll, which are used to build brand awareness and reach, online video platforms offer product placement and endorsements in their original productions. They also offer non-standard ads that allow advertisers to embed extra information in video content, which can generate higher engagement than the standard formats.

Poland's biggest advertisers now commonly use online video to complement linear TV, by extending the incremental reach of their campaigns.

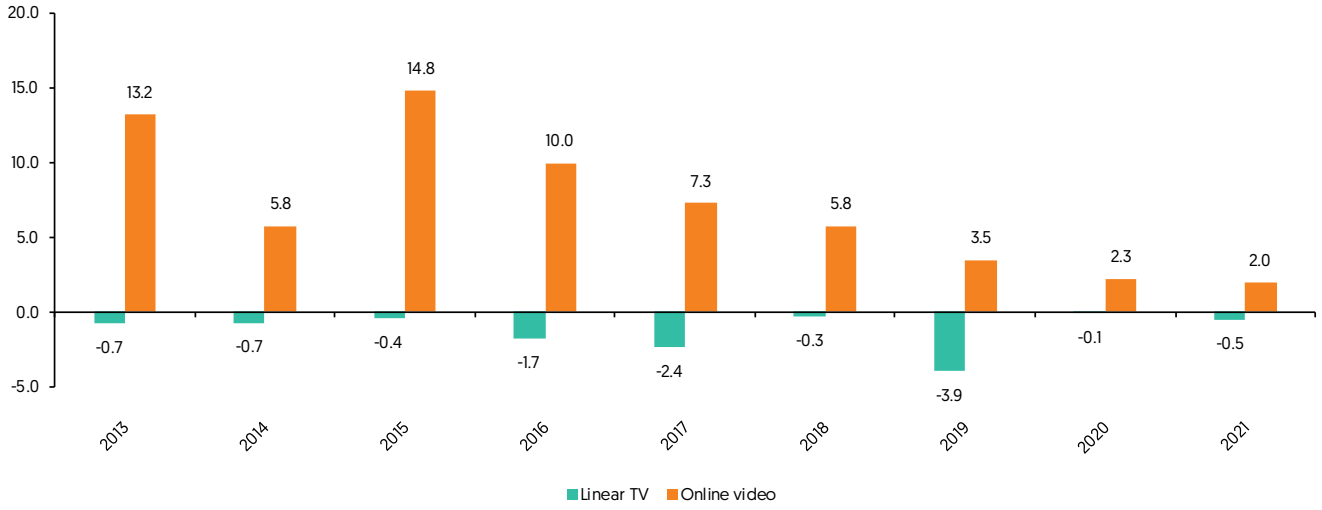
Brands' owned video content is normally spread through their owned media platforms, such as their YouTube channels, Facebook pages, home pages and mobile apps. But occasionally brands use bloggers, vloggers and opinion leaders to spread their videos to their own followers.

Advertising expenditure year-on-year growth (%)



Source: Kantar, Nielsen, IGRZ, IAB, Zenith

Regular viewer numbers year-on-year growth (%)



Source: TGI, MegaPanel, PBI, Zenith Monthly

Romania

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	189.7	32.9	29.0	-	-
2013	184.1	36.2	30.8	-	-
2014	189.6	40.5	34.1	-	-
2015	202.8	50.7	41.6	-	-
2016	230.2	60.8	48.7	6.8	1.1
2017	272.0	73.0	59.8	9.8	2.0
2018	299.2	83.9	68.8	12.2	3.0
2019	314.2	96.5	79.1	14.6	4.4
2020	314.2	111.0	88.8	16.4	4.9
2021	314.2	122.1	95.9	17.7	5.3

Source: Zenith estimates

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	224.2	38.9	34.2	-	-
2013	217.4	42.8	36.4	-	-
2014	224.0	47.9	40.2	-	-
2015	239.6	59.9	49.1	-	-
2016	272.0	71.8	57.5	8.1	1.3
2017	321.4	86.2	70.7	11.5	2.3
2018	353.5	99.1	81.3	14.4	3.6
2019	371.2	114.0	93.5	17.3	5.2
2020	371.2	131.1	104.9	19.4	5.8
2021	371.2	144.2	113.3	20.9	6.3

Source: Zenith estimates

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	6,922	7,010	6,674	6,339	6,320	6,026	5,881	5,895	5,600	5,040
Number of regular connected TV viewers (000s)	-	-	-	-	467	484	425	435	450	450
Number of regular online video viewers (000s)	1,377	1,413	2,017	2,018	2,140	2,298	2,308	2,560	2,816	3,098

Source: Kantar Romania (TV)/SNA Focus (online video); Target: 14-74 Urban Daily

The main platform in Romania is YouTube, which is especially popular among 14-34-year-olds. YouTube users are three times more likely to pay attention to online video ads than TV ads. 38% of total Romanian internet users declare they visit YouTube daily, while 15% do it weekly, meaning 53% of users visit the platform at least once per week. Young users (16-34) are more inclined to visit YouTube daily. Shorter videos of between five and ten minutes are the most popular format. The average internet user in Romania spends around 1 hour and 50 minutes watching online TV streaming.

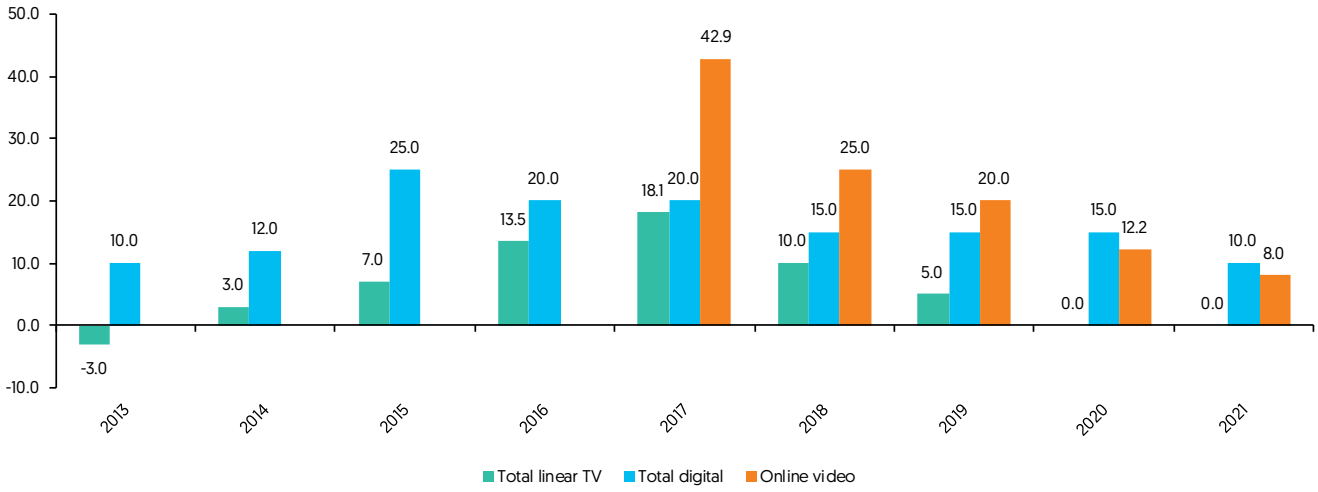
Netflix is currently the leading service for watching shows/videos/movies online, with 40% penetration among Romanian internet users (of which 20% are using a paid account). Followed by Google Play (36%).

Mobile device penetration is on the rise (62% for smartphones in 2019, up from 60% in 2018), and mobile devices are perceived to be the main device used for accessing the internet by 57% of users. Consequently, the number of internet-connected devices used per person is growing, to 2.8 in 2019, up from one in 2012. Fully 84% of all Romanian internet users declare they also use their mobile while watching TV, mainly for social media and email.

More and more advertisers are starting to use third party verification services such as MOAT, IAS and Double Verify; there is pressure on local publishers to increase inventory quality in terms of viewability and brand safety.

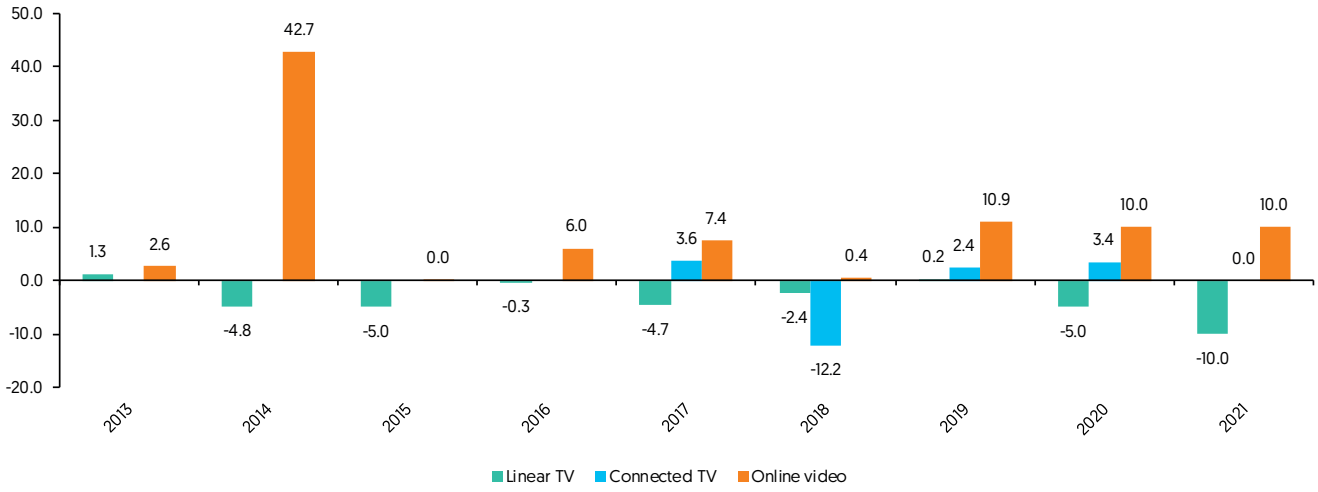
Display video ranks third in total revenue for internet advertising according to IAB Romania, with a share of 18% in H1 2018 (after display embedded and display social media). It also has the second highest year on year increase (+135%), after social media display (+147%).

Advertising expenditure year-on-year growth (%)



Source: Zenith estimates

Regular viewer numbers year-on-year growth (%)



Source: Kantar Romania [TV]/SNA Focus [online video]; Target: 14-74 Urban Daily

Russia

Advertising expenditure (RUB million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	143,210.0	59,000.0	20,600.0	-	-
2013	156,200.0	77,000.0	25,400.0	3,400.0	-
2014	159,800.0	97,000.0	31,500.0	4,760.0	-
2015	136,700.0	112,000.0	24,700.0	5,600.0	-
2016	150,800.0	136,000.0	27,840.0	6,640.0	-
2017	170,896.0	166,340.0	34,340.0	8,340.0	-
2018	187,034.2	202,965.6	39,991.4	10,091.4	-
2019	189,196.8	232,218.2	44,797.9	11,907.9	-
2020	198,132.8	257,200.4	49,050.8	13,694.0	-
2021	207,513.0	281,859.8	52,895.2	15,063.4	-

Source: AKAR

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	2,285.2	941.5	328.7	-	-
2013	2,492.5	1,228.7	405.3	54.3	-
2014	2,549.9	1,547.8	502.6	76.0	-
2015	2,181.3	1,787.2	394.1	89.4	-
2016	2,406.3	2,170.2	444.2	106.0	-
2017	2,727.0	2,654.3	548.0	133.1	-
2018	2,984.5	3,238.7	638.1	161.0	-
2019	3,019.0	3,705.5	714.8	190.0	-
2020	3,161.6	4,104.2	782.7	218.5	-
2021	3,311.3	4,497.7	844.1	240.4	-

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	29,270	29,050	28,837	27,942	27,557	26,741	25,807	25,291	25,038	24,787
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)*	-	10,277	11,185	12,252	12,524	12,646	13,497	13,362	13,228	13,096

*Source: Mediascope TV Index; WEB Index - All 16-54, new methodology since 2018, which reports video player audience (previously video site visitors), MediaScipe pixel; Dec 2018 Daily * Desktop only*

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	14.0	24.0	33.0	62.0	72.7	77.0	85.2	91.4	97.4
Time spent watching online video on mobile devices	-	-	-	-	24.0	25.7	29.0	34.8	40.0	46.0
Time spent watching online video on desktop/non-mobile	-	14.0	24.0	33.0	38.0	47.0	48.0	50.4	51.4	51.4

Source: 2013-2018 - MediaScope [WebIndex, Russia 100K+ for Desktop and 700K+ for Mobile [2013-2016] [Mobile usage for 100K+ since 2017], P12-64

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	-	-	58.2	65.9	65.9	66.5	67.2
Average proportion of online video ads that are fraudulent	-	-	-	-	-	4.7	4.8	4.8	4.8	4.8

Source: 2017-2018 - Zenith estimates based on MOAT benchmarks

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	60,956	22,403
Gender (000s)		
Male	27,006	11,238
Female	33,950	11,165
Age (000s)		
16-24	6,781	3,845
25-34	13,451	7,234
35-44	11,251	5,345
45-54	9,353	3,278
55-64	9,758	1,881
65+	10,362	819
Socioeconomic status		
A (low income)	14,372	4,900
B (medium income)	35,801	12,520
C (high income)	9,549	4,490
other	1,234	493

Source: Mediascope M'Index 2018/1+2 half-year - Russia 100k+, All 16+

The biggest video platforms are YouTube (around 80% of Russians watch at least monthly), VK (the most popular social network in Russia, with a huge video section), and OK. In general, digital video viewing is skewed to youth; the younger the person, the more video content they consume online. However, YouTube has very general profile and covers all of the digital audience fairly evenly.

Short content is the most popular, supported by increasing mobile usage. Around 60% of all video viewing is of short content with a duration of less than five minutes. Mobile is the main source of growth for digital. Currently, almost 90% of YouTube inventory belongs to mobile.

The most common ad formats are the multi-rolls (pre- (60%)/ mid- (30%)/post-rolls (10%)) and interactive video with call to action elements.

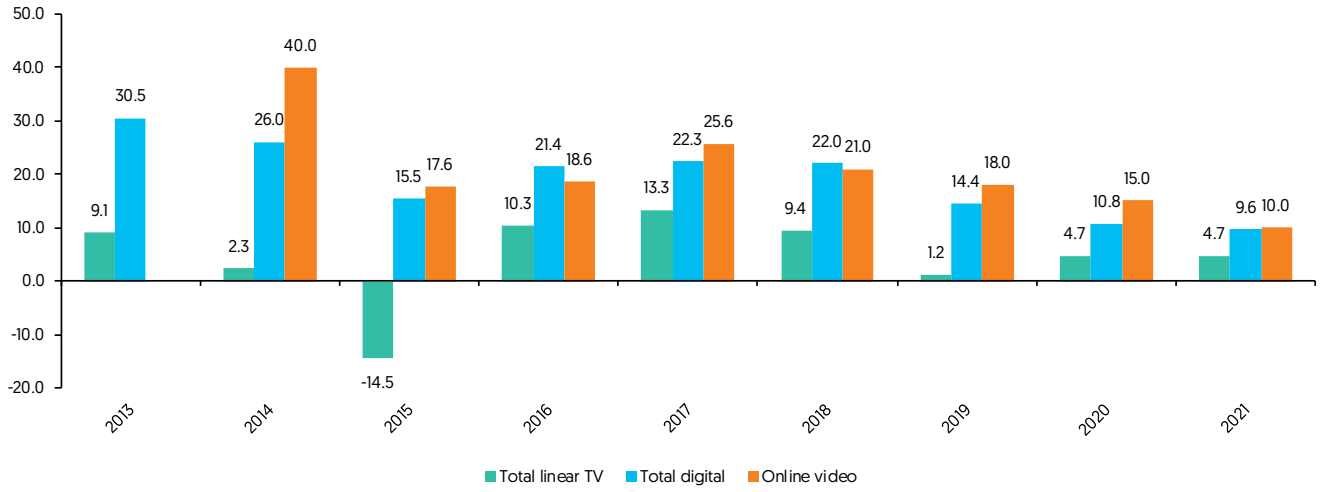
Top advertisers use online video in the media mix to complement TV. Many of them run standalone OLV campaigns as part of complex non-TV activation.

Standard online video works effectively for building brand awareness. However, it is becoming more popular to add call to action buttons to drive purchase intent and online purchases.

Many publishers offer the vCPM (viewable CPM) buying model, where the advertiser pays only for viewable impressions. As more and more advertisers prefer such deals, this has been leading to increased viewability.

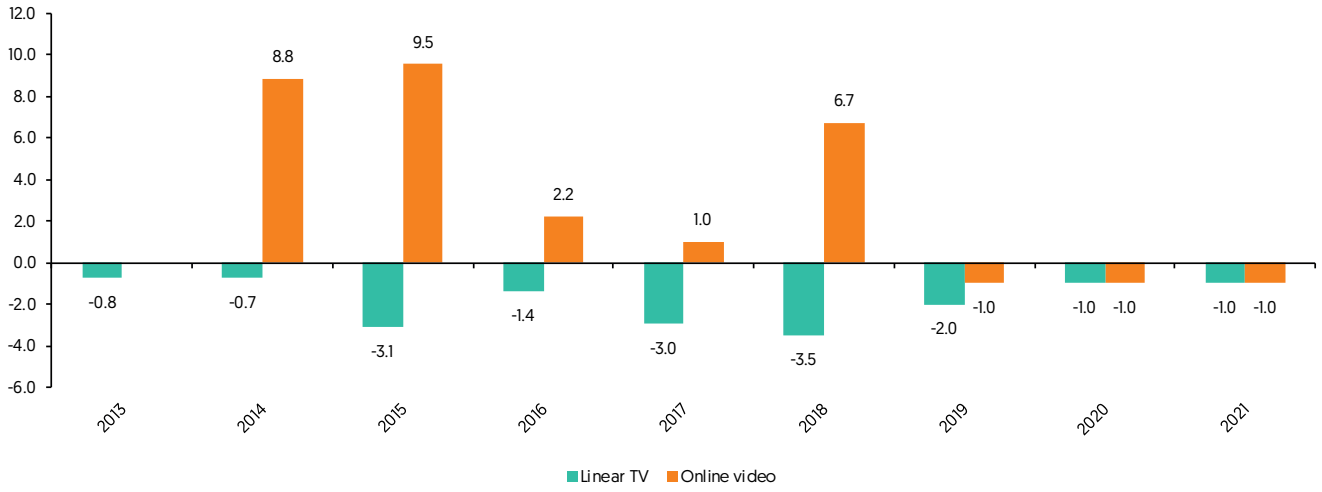
Fraud is low: 2%-5%. This could fluctuate if new types of fraud appear as technology develops.

Advertising expenditure year-on-year growth (%)



Source: AKAR

Regular viewer numbers year-on-year growth (%)



*Source: Mediascope TV Index; WEB Index - All 16-54, new methodology since 2018, which reports video player audience (previously video site visitors), MediaScipe pixel; Dec 2018 Daily * Desktop only*

Serbia

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	97.0	12.0	9.2	0.003	-
2013	87.9	14.3	10.5	0.001	-
2014	87.9	17.4	12.6	0.1	-
2015	90.9	20.3	15.0	0.2	-
2016	101.9	21.5	15.1	0.3	0.004
2017	101.0	26.0	17.9	3.5	2.0
2018	102.0	32.5	24.0	5.0	3.5
2019	108.4	36.5	24.5	6.0	5.0
2020	113.0	40.0	24.6	7.0	7.0
2021	118.0	44.0	26.0	8.0	8.0

Source: Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	114.6	14.2	10.9	0.004	-
2013	103.9	16.9	12.4	0.001	-
2014	103.8	20.5	14.8	0.1	-
2015	107.4	24.0	17.8	0.2	-
2016	120.4	25.4	17.8	0.4	0.005
2017	119.3	30.7	21.2	4.1	2.4
2018	120.5	38.4	28.3	5.9	4.1
2019	128.1	43.1	28.9	7.1	5.9
2020	133.5	47.3	29.1	8.3	8.3
2021	139.4	52.0	30.7	9.5	9.5

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	6,942	6,834	6,834	6,830	6,830	6,830	6,830	6,700	6,700	6,700
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	500	900	1,500	2,300	2,722	2,864	3,159	3,220	3,400	3,800

Source: TGI, Nielsen, Zenith estimates

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	-	-	-	70.6	74.5	77.0	80.0
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: TGI, Zenith estimates

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	5,250	3,159
Gender (000s)		
Male	2,597	1,596
Female	2,653	1,563
Age (000s)		
15-17	157	134
18-24	686	524
25-34	974	734
35-44	964	695
45-54	1,005	557
55-64	1,058	392
65-69	406	123
Socioeconomic status		
Personal Income Q1	1,249	836
Personal Income Q2	1,272	785
Personal Income Q3	1,247	626
other	1,482	912

Source: TGI

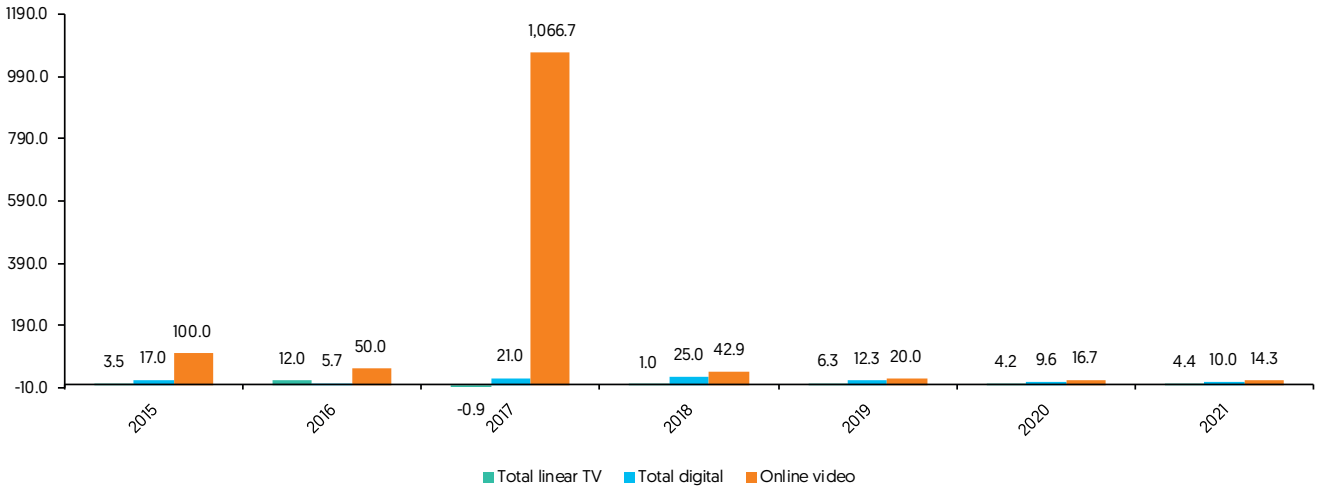
The most dominant video platform is YouTube, which is attracting a fast-growing number of users. The profile of OLV users is similar to that for internet in general; users tend to be younger and better educated – although usage by older segments of the population is growing all the time. People under 35 watch more YouTube than traditional linear TV.

With the rise of influencers, we are seeing a shift upwards in the popularity of lifestyle, fashion and gaming videos, all representing popular influencer categories. In terms of formats, short forms of up to six seconds' duration and with sound branding included are the best performing.

Serbia is still a TV-dominant market, and we are still seeing brands placing TV ads online without adaptation for social media. However, recently we have seen a slight push from media and creative agencies towards shorter, online-optimized formats, which can be drivers of digital, better complementing TV advertising. We have also seen an increase in in-stream ads and Instagram Stories ads, particularly targeting younger people. Instagram Stories are great for building reach with short, impactful videos that can deliver the message quickly and effectively. Longer videos are usually abandoned after 40%-45% view rate, but are great for raising awareness about a certain topic among the target group.

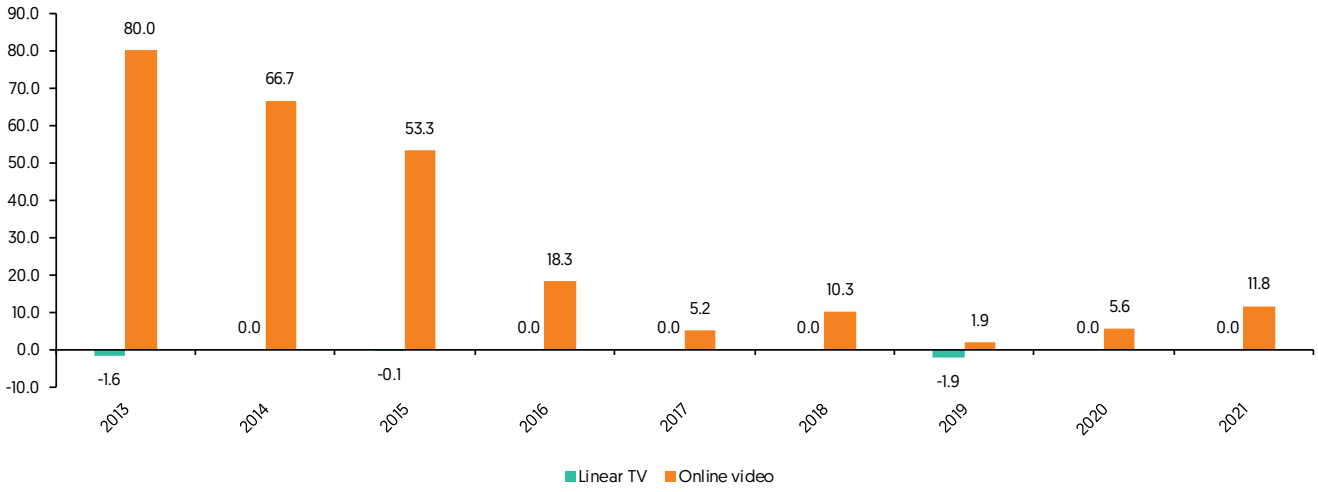
Mobile-based video viewing is extremely important as most of the traffic comes from mobile these days. With the increase in mobile consumption, and reduction in consumer attention span, there is an ever-increasing need for better and more effective mobile video formats.

Advertising expenditure year-on-year growth (%)



Source: Zenith

Regular viewer numbers year-on-year growth (%)



Source: TGI, Nielsen, Zenith estimates

Slovakia

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	4,042	3,999	3,899	3,898	3,770	3,572	3,296	3,200	3,100	3,100
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)**	700	950	1,226	1,300	1,340	1,423	1,508	1,600	1,750	1,900

Source: MML TGI
** daily ** monthly*

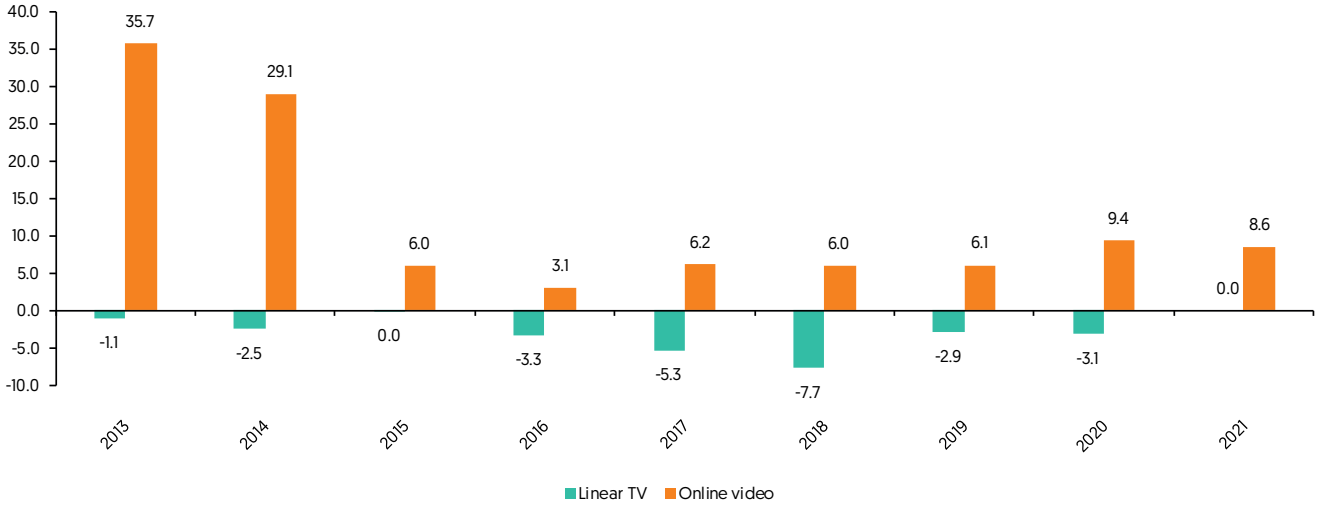
Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	4,472	1,508
Gender (000s)		
Male	2,187	784
Female	2,285	724
Age (000s)		
under 16	48	23
16-24	613	298
25-34	846	396
35-44	861	327
45-54	723	201
55-64	744	177
65+	637	86
Socioeconomic status		
AB	1,332	562
CDE	3,140	947

Source: Zenith

The main platforms in Slovakia are YouTube, Valentin, Joj.sk, Huste.tv and Markiza.sk. About 65% of viewed content is short-form, the rest being long-form. Pre-roll, mid-roll and post-roll ads are all used within this content. At the moment, advertisers only use online video to complement television campaigns. We expect audiovisual advertising to remain the most important form of advertising, but more viewing will take place on mobile screens instead of television and desktop screens, which currently dominate.

Regular viewer numbers year-on-year growth (%)



Source: MML TGI
** daily ** monthly*

Slovenia

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	43.4	7.8	5.7	-	-
2013	55.5	8.7	6.3	-	-
2014	58.0	10.5	7.5	-	-
2015	67.0	12.0	9.3	-	-
2016	67.0	12.0	9.5	3.5	-
2017	84.0	14.0	11.0	4.5	-
2018	91.0	14.0	11.0	5.9	-
2019	95.0	16.0	13.0	6.9	-
2020	100.0	18.0	15.5	7.2	-
2021	101.0	19.0	16.0	7.5	-

Source: IBO Mediana, IAB, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	51.2	9.2	6.7	-	-
2013	65.6	10.3	7.4	-	-
2014	68.5	12.4	8.9	-	-
2015	79.2	14.2	11.0	-	-
2016	79.2	14.2	11.2	4.1	-
2017	99.2	16.5	13.0	5.3	-
2018	107.5	16.5	13.0	7.0	-
2019	112.2	18.9	15.4	8.2	-
2020	118.1	21.3	18.3	8.5	-
2021	119.3	22.4	18.9	8.9	-

Source: IBO Mediana, IAB, Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	1,288	1,276	1,287	1,289	1,298	1,262	1,255	1,255	1,250	1,248
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)**	-	-	-	-	946	-	1,074	1,100	1,105	1,150

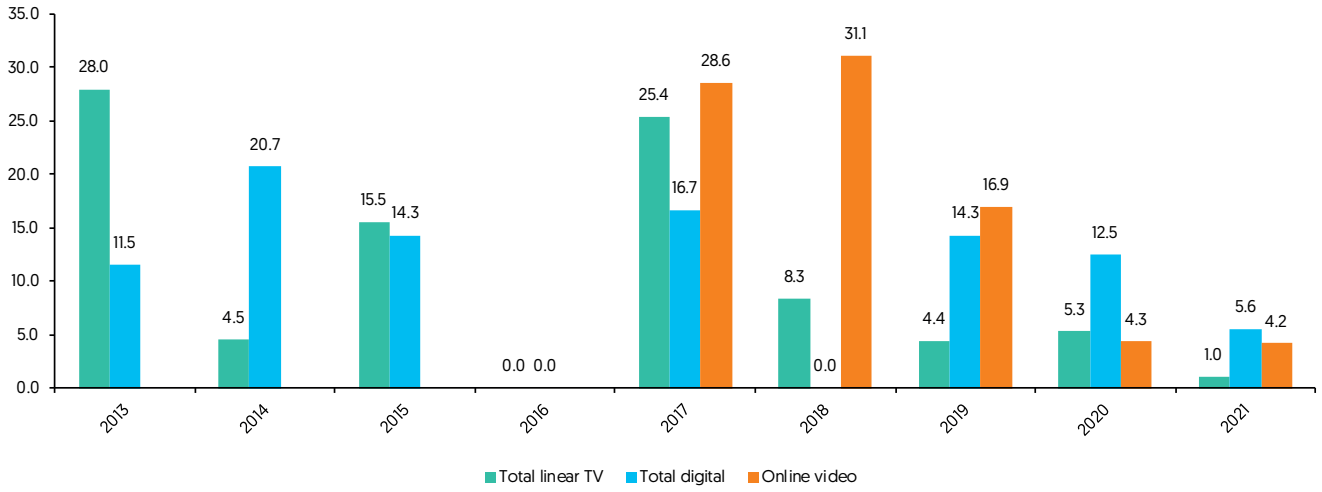
Source: AGB Nielsen, SURS, Zenith
** Monthly, **Annual*

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	2,070	703
Gender (000s)		
Male	1,030	402
Female	1,040	301
Age (000s)		
under 16	330	-
16-24	175	145
25-34	253	204
35-44	309	162
45-54	301	113
55-64	295	80
65+	407	-
Monthly income €(000s)		
up to 450	180	96
451-950	396	170
951-1,200	286	143
1,201-1,400	118	94
1,401-1,700	118	58
1,701-2,100	100	34
over 2,100	91	46

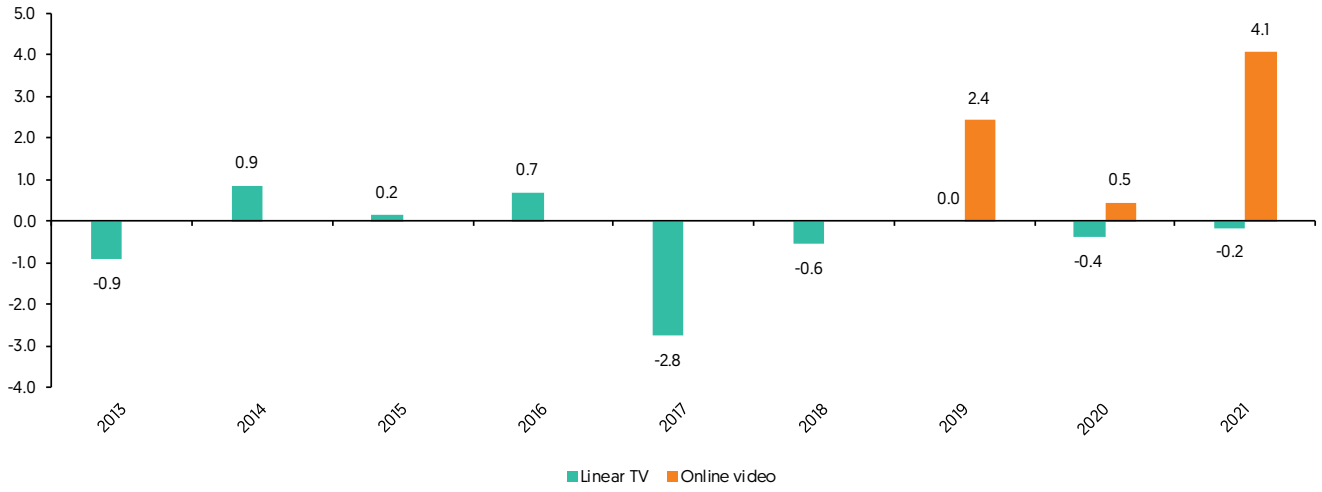
Source: SURS, Brand Pulse IPSOS

Advertising expenditure year-on-year growth (%)



Source: IBO Mediana, IAB, Zenith

Regular viewer numbers year-on-year growth (%)



Source: AGB Nielsen, SURS, Zenith
** Monthly, **Annual*

Spain

Advertising expenditure (EUR million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	1,815.0	880.0	462.0	-	-
2013	1,703.4	896.3	408.6	-	-
2014	1,890.4	1,148.6	578.3	71.5	-
2015	2,011.3	1,287.4	637.8	117.1	7.1
2016	2,122.0	1,470.8	735.0	158.6	9.9
2017	2,143.3	1,548.1	735.8	187.7	18.8
2018	2,127.2	1,742.7	822.2	211.0	21.1
2019	2,095.3	1,916.3	906.5	244.8	24.5
2020	2,032.4	2,071.1	974.6	283.9	28.4
2021	1,961.3	2,217.3	1,035.7	329.3	32.9

Source: Infoadex, IAB, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	2,144.3	1,039.7	545.8	-	-
2013	2,012.5	1,058.9	482.7	-	-
2014	2,233.4	1,357.0	683.2	84.5	-
2015	2,376.3	1,521.0	753.5	138.3	8.4
2016	2,507.0	1,737.7	868.4	187.4	11.7
2017	2,532.2	1,829.0	869.3	221.8	22.2
2018	2,513.2	2,059.0	971.4	249.3	24.9
2019	2,475.5	2,264.0	1,071.0	289.2	28.9
2020	2,401.2	2,446.9	1,151.4	335.4	33.5
2021	2,317.2	2,619.6	1,223.6	389.1	38.9

Source: Infoadex, IAB, Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	7,505	7,446	7,360	7,249	7,111	6,954	6,753	6,584	6,420	6,259
Number of regular connected TV viewers (000s)**	-	-	1,881	2,436	2,854	4,884	6,027	7,232	8,679	10,415
Number of regular online video viewers (000s)***	-	-	-	-	-	31,886	32,555	33,206	33,870	34,548

Source: Kantar, AIMC, Video Metrix, Zenith
**Daily, **Annual, ***Monthly*

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	-	-	42.2	48.5	53.4	58.7	64.6
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: Video Metrix, Zenith

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	21,860	17,051
Gender (000s)		
Male	10,539	8,039
Female	11,321	9,012
Age (000s)		
under 16	1,500	1,216
16-24	4,787	4,241
25-34	4,560	3,887
35-44	3,637	3,023
45-54	3,067	2,372
55-64	2,526	1,571
65+	1,785	742
Socioeconomic status		
High	4,601	3,973
Medium	6,710	5,468
Low	10,549	7,610

Source: TGI January - December 2018 (Kantar Ibope Media)

Google's YouTube leads the online video market by some distance in terms of both viewers and video views. However, the Spanish market has a complex ecosystem in which several players fight for ad revenues:

- Pre-roll networks - Sunmedia, SmartClip and Yume
- In-banner networks - GDN and Teads
- Social video networks (blogs and vblogs) - Adman and Teads
- SSPs - Aunia (MediaSet or Atresmedia) and Facebook LiveRail
- TV channel properties - Atres and MiTele are making huge efforts to offer more and better content on their sites and connected TV apps

In Spain, TV and the internet dominate media consumption; however, the average time spent viewing TV is decreasing, especially among millennials and Generation Z. This reduction in consumption is due the consumption of audiovisual content on other devices such as smartphones, tablets and PCs.

OTT has come to Spain. From its launch in Spain in 2015, Netflix had achieved penetration of 9.1% by the end of 2017 (a 406% increase since mid-2016). Meanwhile, Movistar+ grew 73% in the same period, penetration now standing at 13.5%. This is driving the traditional television channels to look for new solutions to adapt to new consumer demands. RTVE (Spanish public television), Atresmedia and Mediaset recently announced a joint HbbTV (hybrid broadcast broadband) platform for all open-access TV channels, with the objective of adding an OTT service in the future.

People using online video platforms are mostly young. 63.8% of people who watch online video are under 44 years old.

According to TGI Net, the five types of video content most watched in Spain are:

- Music videos/concerts (with a reach of 38.7% of total internet users)
- Humour videos (37.6%)
- News (35.6%)
- Tutorials (32.8%)
- Movie trailers/shorts (31.7%)

Younger people prefer watching movies, video blogs and gameplay videos, while older people tend to watch more tutorials and news.

Long-form videos are mainly supplied by TV channels, OTT and YouTube.

Most advertisers use online video as a complement to linear TV and to reach light TV viewers and younger target audiences. Several categories, such as food, beauty and motors, use this strategy.

In-stream video is becoming more common. This was launched by Twitter in Spain at the end of October 2018. According to Nielsen, it enhances brand recall by up to 194%. Nevertheless, the limited inventory is inconvenient, especially in peak TV timeslots. Advertisers understand that in-stream combined with out-stream is the best way to maximise reach.

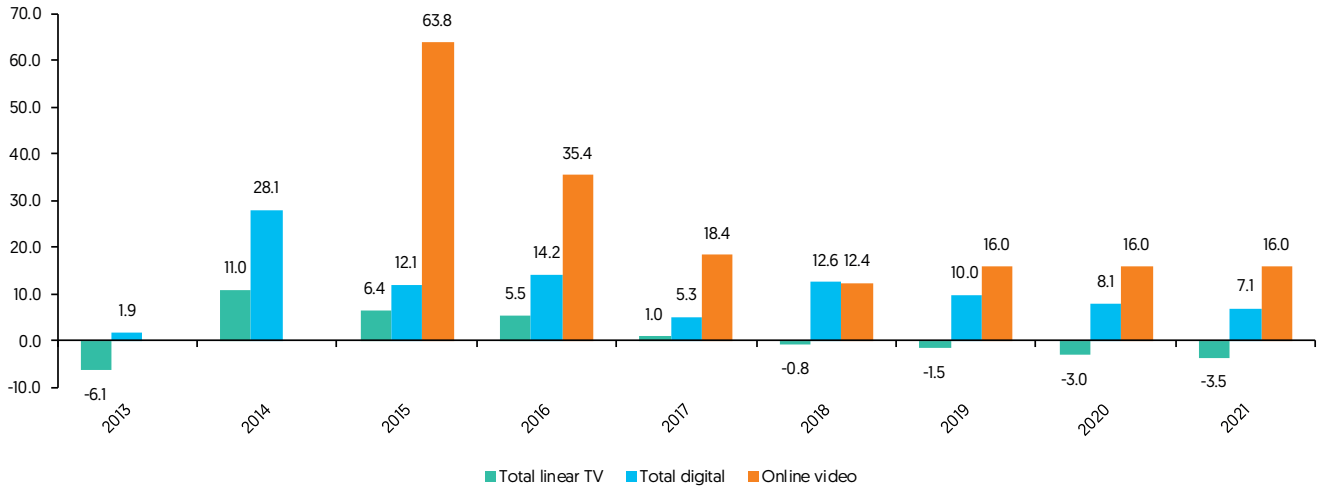
Online video is positioned as the most effective format for recall. According to our study 'Net Radar', video is the key format on PCs, with recall 25% above average. Not all video formats have the same recall performance, however. Video in-banner gets the best results (+58% of recall above average). We can highlight also the effectiveness of video in other devices, such as tablets and mobiles – video achieves good results on both.

Other research has shown that video viewers' attention and recall drops after five seconds, so it is important for advertisers to show their most important messages at the beginning of their spots.

Advertisers are using their own video channels and social networks more and more, and multiscreen budgets are normal. Videology estimated that 78% of all campaigns in Q4 2017 combined PC and mobile impressions.

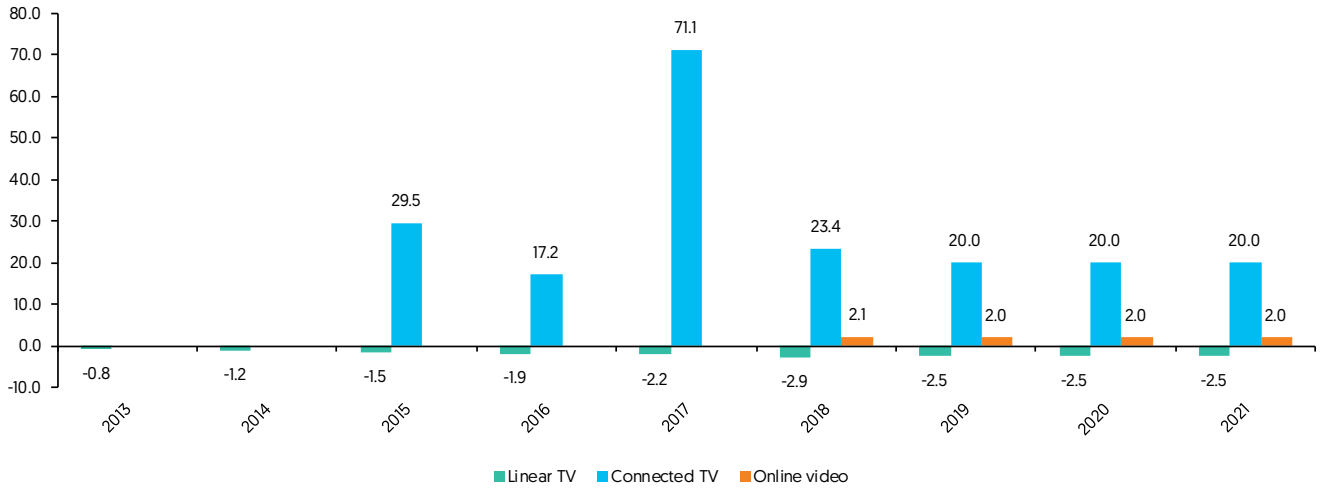
Mobile video is expected to keep growing in Spain. Telecoms companies are improving their data packages still to remain competitive and justify their price increases. Companies are adding more data to their plans, and in some cases offer data for free. This will encourage people to consume more video content, as well as uploading more of their own.

Advertising expenditure year-on-year growth (%)



Source: Infoadex, IAB, Zenith

Regular viewer numbers year-on-year growth (%)



Source: Kantar, AIMC, Video Metrix, Zenith
**Daily, **Annual, ***Monthly*

Sweden

Advertising expenditure (SEK million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	5,946	7,689	2,583	288	-
2013	5,961	8,232	2,763	412	-
2014	5,769	10,796	3,785	648	-
2015	5,494	12,981	4,297	922	-
2016	5,397	15,801	4,687	1,143	-
2017	5,490	19,054	5,100	1,518	-
2018	5,953	21,430	5,460	1,819	-
2019	5,971	23,616	5,803	2,109	-
2020	5,803	26,722	6,480	2,701	-
2021	5,721	29,127	6,849	3,002	-

Source: IRM, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	684	885	297	33	-
2013	686	947	318	47	-
2014	664	1,242	435	75	-
2015	632	1,493	494	106	-
2016	621	1,818	539	131	-
2017	632	2,192	587	175	-
2018	685	2,465	628	209	-
2019	687	2,717	668	243	-
2020	668	3,074	745	311	-
2021	658	3,351	788	345	-

Source: IRM, Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	5,822	5,945	6,005	6,094	5,853	5,493	5,191	5,355	5,241	5,042
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	-	-	-	-	-	3,896	4,130	4,380	4,619	4,861

Source: Kantar Sifo Orvesto Daily

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	-	-	-	-	-	92.9	96.6	103.2	106.6	109.9
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: Kantar Sifo Orvesto

Demographics

	General population	Online video viewers
	2019	2019
Total (000s)	7,837	4,380
Gender (000s)		
Male	3,968	2,395
Female	3,969	1,985
Age (000s)		
under 16	N/A	
16-24	1,043	841
25-34	1,431	1,093
35-44	1,276	828
45-54	1,346	720
55-64	1,164	469
65+	1,576	430
Socioeconomic status (000s)		
AB	2,208	1,427
CDE	4,049	2,125
FG	242	156

Source: Kantar Sifo

The most popular video platforms in Sweden are YouTube, Netflix, Facebook, newspapers' web-TV services, HBO, and the largest broadcasters' play channels (commercial TV4Play & public service SVT Play).

Younger men consume the most YouTube, while younger women consume the most social media. Older people mainly consume play channels, web-TV and Netflix.

Online content is shifting to video on most platforms. Social and mobile platforms mainly show short clips, but longer formats are becoming more popular. Play channels, web-TV and subscription video-on-demand services mainly offer longer content. Play channels show live TV and programme clips, plus web original and re-broadcast content.

On top of paid spots, advertisers use branded content, influencers and sponsorships. Call-to-action video and shoppable content are becoming more common.

Reach and brand awareness campaigns mainly use cost-effective short-format ads, while longer-format ads can be used to drive consideration and time spent with brand.

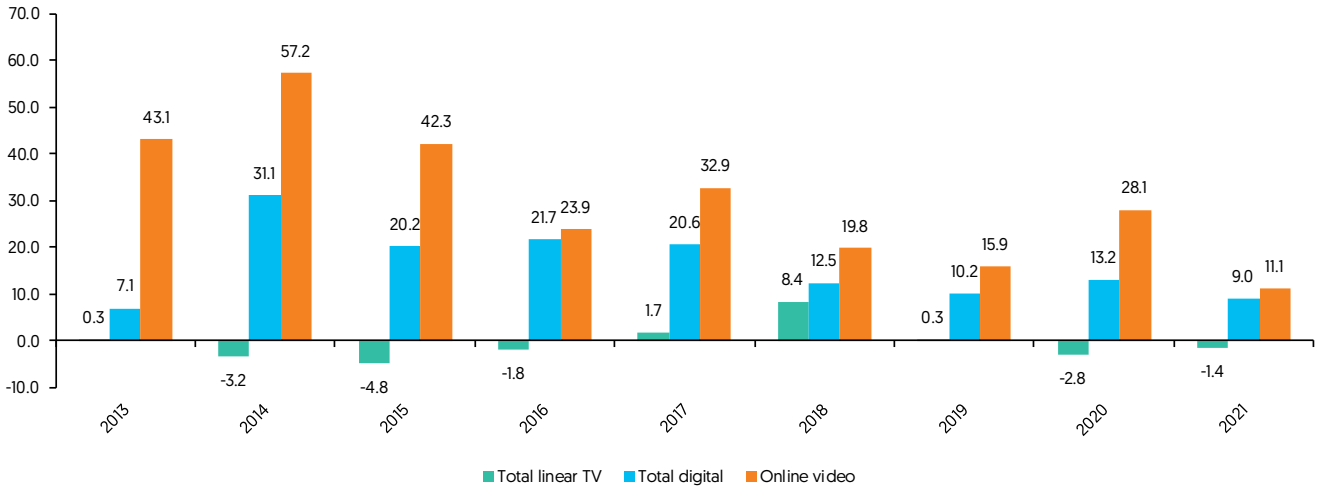
Brands are paying more attention to ensuring high viewability and brand safety and avoiding fraud, and more tools are becoming available to address their concerns.

Most large advertisers complement TV with online video, while some advertisers with small budgets use online video to replace TV altogether, especially those with younger target audiences.

Owned video content is most often used on owned social channels and corporate websites.

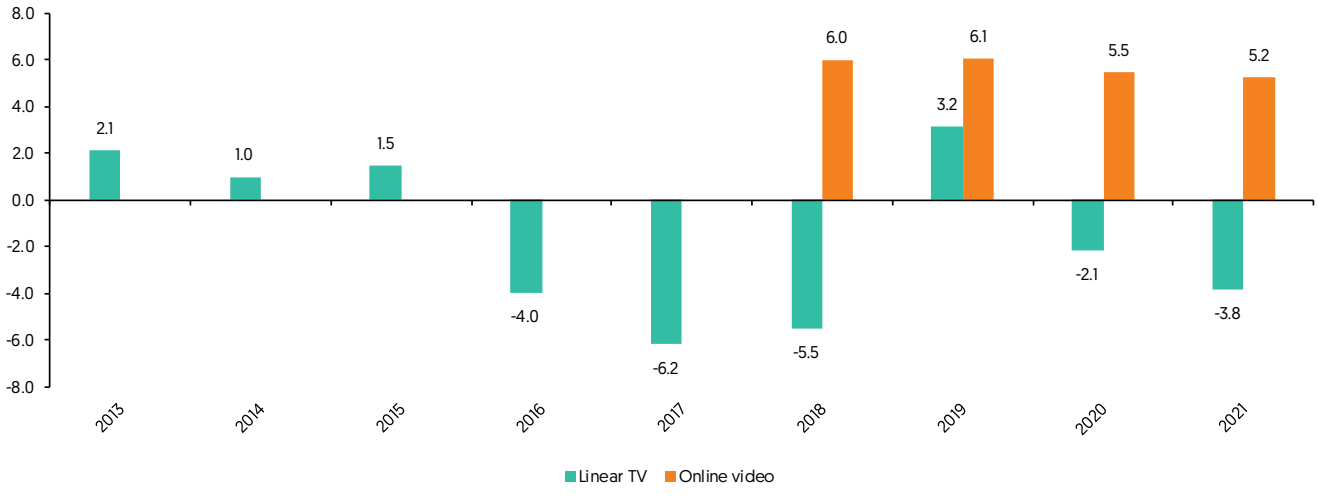
We expect audiovisual advertising to continue to grow, both in expenditure and consumption. Mobile video will grow in importance. Mobile campaigns now generally use mobile-first creative rather than adapting existing TV spots.

Advertising expenditure year-on-year growth (%)



Source: IRM, Zenith

Regular viewer numbers year-on-year growth (%)



Source: Kantar Sifo Orvesto Daily

Switzerland

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	-	5,295	5,383	5,314	5,292	5,342	5,221	5,200	5,150	5,100
Number of regular connected TV viewers (000s)**	-	-	-	-	-	3,511	3,640	3,769	3,898	4,027
Number of regular online video viewers (000s)***	-	-	-	2,798	3,050	2,878	2,943	3,008	3,073	3,138

Source: MA Stategy Basic/NetMetrix Base/IGEM digiMonitor
**Total reach **Weekly ***Several times monthly*

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	6,772	3,888
Gender (000s)		
Male	3,356	2,228
Female	3,416	1,660
Age (000s)		
under 16	230	186
16-24	790	683
25-34	1,060	798
35-44	1,041	711
45-54	1,321	723
55-64	956	439
65+	1,376	348
Socioeconomic status (000s)		
AB	2,121	1,442
CDE	4,651	2,446
FG	-	-

Source: NetMetrics Base 2018-2

In Switzerland YouTube is the most used platform. The rest of the online video market is fragmented, consisting of live TV platforms (such as Zattoo) and catch-up TV portals with broadcasters' content (such as pro7.ch and sat1.ch).

The younger the audience, the more they view online video. As the content on offer becomes more diverse, it is becoming more popular with older viewers as well.

Live TV delivered by internet is becoming more important, especially when there are big sport events. Video viewing is getting more fragmented as viewers follow their individual preferences. Most types of content are getting longer.

A wide range of online video ad formats are available. Google offers its TrueView format for in-stream and bumper ads. Advertisers are also investing more in pre-roll and mid-roll ads as well as out-stream formats within news content. Online videos are also adding interactive and commerce, such as shoppable story ads.

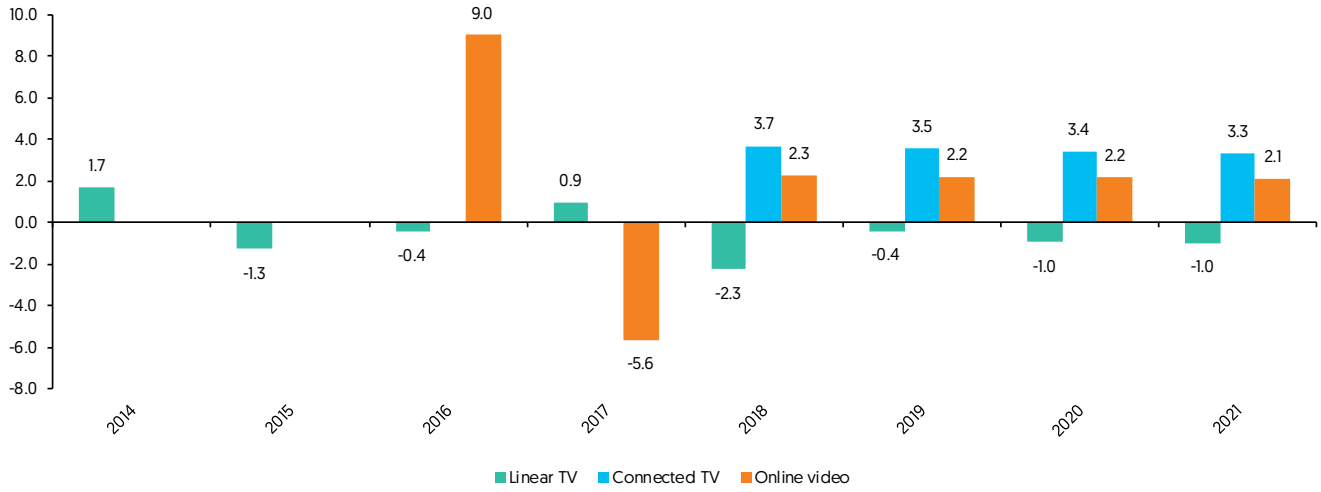
Online video is mostly used for awareness, so completion rate and costs-per-view are the key performance indications. Many publishers force users to watch at least 5 to 15 seconds of the video. It is becoming more important to create dedicated creative material for online video to convey the brand message effectively and engage users to watch the full video. This especially on platforms like Facebook where it is much easier to scroll away from ads than for in-stream formats.

Nearly all advertisers that spend large sums on TV are now spending part of their budgets on online video. For some young target audiences, advertisers are starting to use only online video, which is better able to target these small audiences.

Advertisers are using their owned video content to attract consumers' attention through their interests, and are producing various formats of online video content with different lengths and content. Larger advertisers are building hubs for their video content, mostly on YouTube or Facebook, especially for content that provides viewers with advice or instructions.

Most online video campaigns include smartphone and tablet devices to ensure maximum reach. Mobile-based viewing is currently at 50%-60% of the total, depending on campaign. As this proportion rises it will be even more important to make sure that creative works on all sizes of screen and can adapt to vertical and square formats.

Regular viewer numbers year-on-year growth (%)



Source: MA Stategy Basic/NetMetrix Base/IGEM digiMonitor
**Total reach **Weekly ***Several times monthly*

Taiwan

Advertising expenditure (TWD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	24,059.0	11,601.0	-	-	-
2013	24,810.0	13,680.0	-	-	-
2014	24,584.0	16,177.0	-	-	-
2015	24,165.0	19,352.0	-	-	-
2016	22,534.0	25,871.0	11,913.0	4,944.0	-
2017	21,359.8	33,097.0	10,296.0	5,266.0	-
2018	20,664.3	37,393.5	11,453.0	6,317.0	-
2019	20,251.0	39,825.4	12,136.1	6,948.7	-
2020	19,845.9	42,238.4	12,674.3	7,435.1	-
2021	19,647.5	44,488.2	13,046.1	7,806.9	-

Source: Nielsen Media Research, DMA

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	797.7	384.6	-	-	-
2013	822.6	453.6	-	-	-
2014	815.1	536.3	-	-	-
2015	801.2	641.6	-	-	-
2016	747.1	857.7	395.0	163.9	-
2017	708.2	1,097.3	341.4	174.6	-
2018	685.1	1,239.8	379.7	209.4	-
2019	671.4	1,320.4	402.4	230.4	-
2020	658.0	1,400.4	420.2	246.5	-
2021	651.4	1,475.0	432.5	258.8	-

Source: Nielsen Media Research, DMA

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	32.2	34.5	45.9	47.4	48.5	51.6	52.6	55.2	57.1	58.5
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: GWI

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	17,954	13,504
Gender (000s)		
Male	8,986	6,664
Female	8,968	6,841
Age (000s)		
under 16	654	527
16-24	2,944	2,643
25-34	3,278	2,985
35-44	3,855	3,339
45-54	3,617	2,463
55-64	3,606	1,547

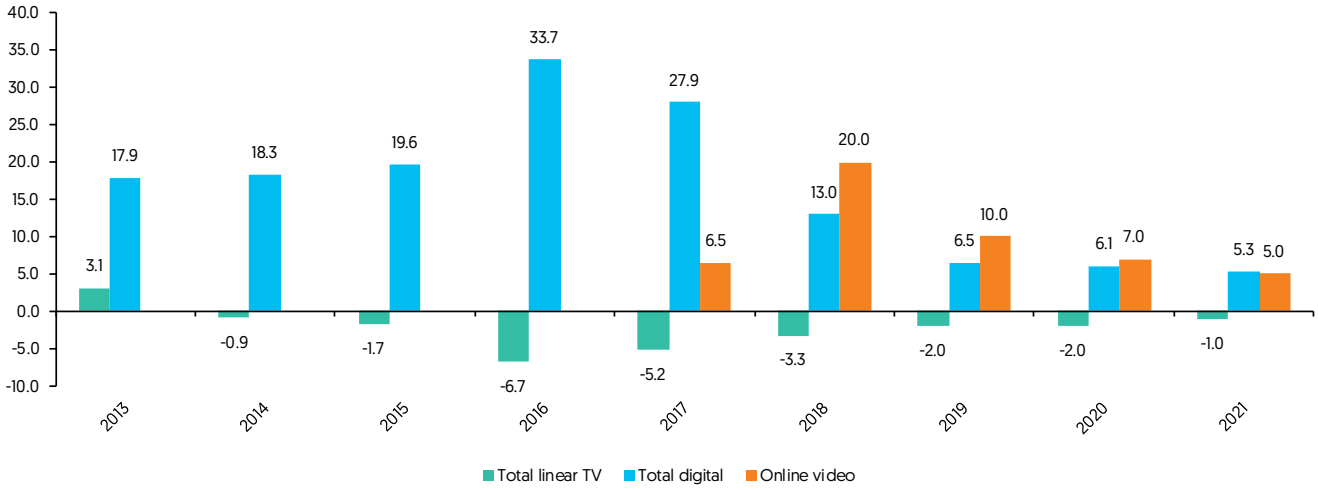
Source: Nielsen Media Research

The reach of online video in Taiwan rose to 75% in 2018, with particularly strong figures seen in the 25-34 age group, where reach was 91%. The percentage of people watching online video on mobile phones increased from 66% to 71% in 2018.

A few key players dominate online video platforms in Taiwan, and YouTube is the main platform. The top five online video platforms are YouTube (with a reach of 66.8%), iQiyi (17.6%) Yahoo TV! (15.6%), bilibili (9.3%) and 8Maple (8.7%). There are more male viewers on bilibili, while women focus more on Yahoo TV! And iQiyi. In addition, the videos on YouTube and iQiyi are most popular with those aged 15-44, on bilibili 18-34, while Yahoo TV! attracts an older audience.

According to comScore, the most popular online video categories in Taiwan are drama/serial drama (59.5%), variety shows (21.7%), music/MV (13.7%), and news/financial (11.2%).

Advertising expenditure year-on-year growth (%)



Source: Nielsen Media Research & DMA

Thailand

Advertising expenditure (THB million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	68,105	2,368	1,792	303	-
2013	69,250	3,670	2,731	472	-
2014	83,084	5,510	4,115	856	-
2015	84,511	7,230	6,252	1,921	-
2016	71,010	8,332	7,266	2,034	-
2017	65,473	11,244	10,210	3,461	-
2018	68,400	15,047	13,396	5,179	-
2019	68,100	15,803	13,793	4,657	-
2020	68,500	19,000	17,190	5,220	-
2021	70,000	21,500	19,500	6,200	-

Source: AGBNielsen. DAAT, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	2,033.7	70.7	53.5	9.1	-
2013	2,067.9	109.6	81.6	14.1	-
2014	2,481.1	164.5	122.9	25.6	-
2015	2,523.6	215.9	186.7	57.4	-
2016	2,120.5	248.8	217.0	60.7	-
2017	1,955.1	335.8	304.9	103.4	-
2018	2,042.6	449.3	400.0	154.7	-
2019	2,033.6	471.9	411.9	139.1	-
2020	2,045.5	567.4	513.3	155.9	-
2021	2,090.3	642.0	582.3	185.1	-

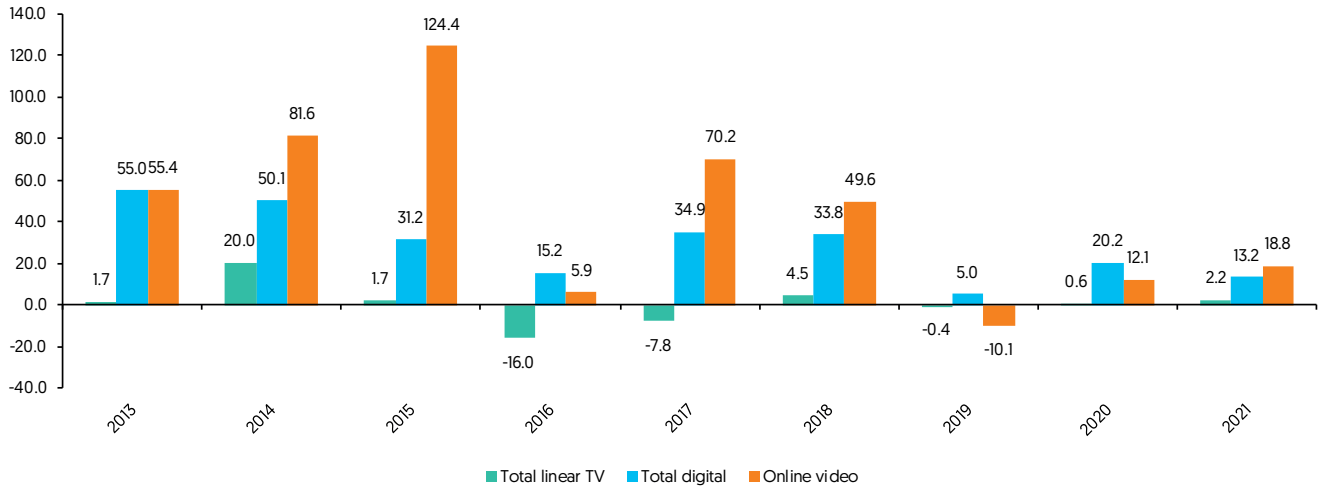
Source: AGBNielsen. DAAT, Zenith

YouTube and Facebook are the main video platforms in Thailand, and are most commonly used by people aged 18-35.

Advertisers use pre-roll, mid-roll, post-roll and bumper ads, in either short-form or long-form format. Short-form ads last from six to 15 seconds and are used to generate awareness and recall, while long-form ads last from 30 seconds to three minutes, and are used to tell the brand story and supply product details.

More than 70% of video views in Thailand are from mobile devices.

Advertising expenditure year-on-year growth (%)



Source: AGBNielsen. DAAT, Zenith

Turkey

Advertising expenditure (TRY million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	2,606	421	380	45	-
2013	2,908	495	446	70	-
2014	3,052	1,182	507	101	-
2015	3,270	1,484	600	135	-
2016	3,680	1,736	738	180	-
2017	3,834	2,077	1,265	270	-
2018	3,875	2,385	1,438	353	-
2019	4,069	2,671	1,611	450	-
2020	4,493	3,135	1,890	530	-
2021	4,986	3,731	2,250	620	-

Source: IAB Turkey, AA Turkey, Zenith Forecast

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	539.7	87.2	78.6	9.3	-
2013	602.3	102.5	92.4	14.4	-
2014	632.1	244.8	105.0	20.9	-
2015	677.2	307.3	124.3	27.9	-
2016	762.1	359.5	152.8	37.2	-
2017	794.0	430.1	262.0	55.8	-
2018	802.5	493.9	297.8	73.0	-
2019	842.6	553.2	333.6	93.2	-
2020	930.4	649.2	391.5	109.8	-
2021	1,032.5	772.6	465.9	128.4	-

Source: IAB Turkey, AA Turkey, Zenith Forecast

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)*	33,294	33,307	31,203	34,542	45,007	40,175	44,533	46,188	48,376	50,564
Number of regular connected TV viewers (000s)**	-	-	9,057	10,408	9,178	10,996	13,834	13,737	14,751	15,766
Number of regular online video viewers (000s)***	717	3,975	4,542	6,131	8,643	6,986	13,830	13,469	15,236	17,002

Source: TGI, GlobalWebIndex, Zenith
**Daily **Monthly **Weekly*

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	1.2	6.8	8.1	12.1	13.7	11.5	36.3	29.8	35.0	40.5
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: TGI

Demographics

	General population	Online video viewers
	2018	2018
Total (000s)	55,055	23,171
Gender (000s)		
Male	27,398	12,351
Female	27,657	10,820
Age (000s)		
15-24	11,892	6,814
25-34	11,979	6,324
35-44	11,048	5,147
45-54	8,510	2,862
55-64	7,803	1,586
65+	3,824	438
Socioeconomic status (000s)		
AB	8,620	4,772
C1	12,421	6,091
C2	17,355	7,867
DE	16,659	4,441

Source: TGI

In 2018 there were 45 million regular TV watchers, and 14 million regular online video viewers. The number of regular online video viewers doubled between 2017 to 2018 and is expected to grow by 23% over the next three years. This growth in audience has stimulated growth in adspend too: online video adspend grew 31% in 2018 and is forecast to grow 76% between 2018 and 2021.

The main trend in Turkish online video is the use of data to power interactivity. Data-driven creative, playable ads in TV platforms and YouTube shopping ad campaigns are opening new horizons in marketing as well as e-commerce.

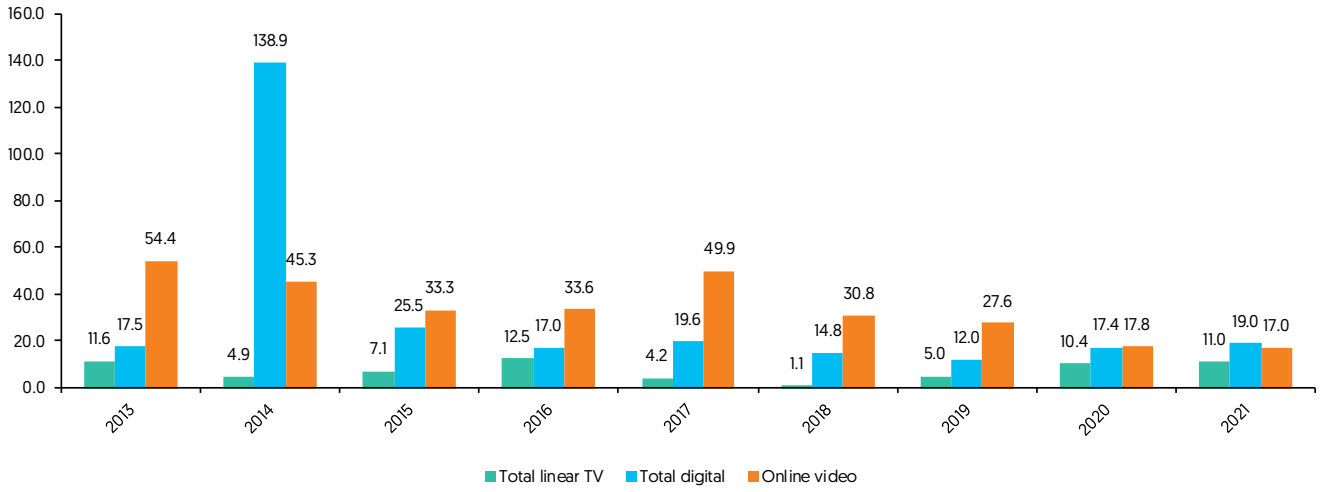
YouTube is the main video platform in Turkey. Its reach is as high as 92% among internet users and it is widely used in integrated screen planning to add incremental reach to TV. TrueView ads and bumper ads are the most effective formats. Longer-form video ads with TrueView are used to generate reach, and bumper ads are used for frequency.

Influencer channels are still popular, and are widely used by brands. Also popular are the online video platforms that TV channels use to stream their own content, mainly popular TV series. These series run without censorship or long ad breaks and bring incremental reach. Monthly page views can be as high as 90 million.

Turkey has three domestic online-only video platforms: Puhu TV, bluTV and Foxplay. These platforms provide original and platform-owned content, mainly online video series. Puhu TV and bluTV are well established and have been successful: Puhu TV has ten million unique visitors and bluTV has three million. Netflix was launched in Turkey three years ago but has a very limited subscriber base. Foxplay is the new online video platform powered by Fox TV, supplying existing offline content and digital-exclusive content to viewers. Although Netflix and bluTV do not allow advertising, Foxplay differentiates itself with its interactive playable ads, giving viewers the opportunity to buy items directly from the content they've seen.

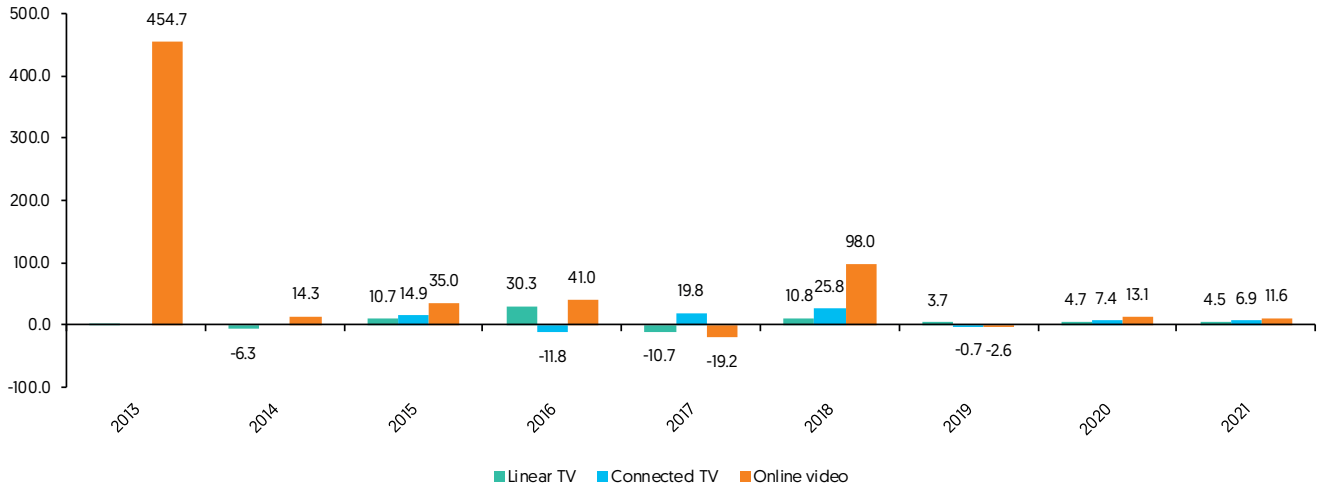
Turkey is a mobile-friendly country. Mobile device penetration is 98% and smartphone penetration is 77%. There are 59 million active mobile internet users and 88% of them view online video over their phones at least occasionally.

Advertising expenditure year-on-year growth (%)



Source: IAB Turkey, AA Turkey, Zenith Forecast

Regular viewer numbers year-on-year growth (%)



Source: TGI, GlobalWebIndex, Zenith
**Daily **Monthly **Weekly*

Ukraine

Advertising expenditure (UAH million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	3,850.0	670.0	-	-	-
2013	4,800.0	2,000.0	-	-	-
2014	3,850.0	2,150.0	-	-	-
2015	4,200.0	2,365.0	-	-	-
2016	5,500.0	3,100.0	1,800.0	511.1	255.6
2017	7,300.0	4,300.0	2,400.0	797.8	438.8
2018	9,200.0	5,600.0	3,200.0	1,725.7	949.1
2019	11,040.0	6,720.0	4,020.0	2,461.9	1,354.0
2020	13,248.0	7,764.0	4,700.0	3,055.0	1,680.3
2021	15,898.0	9,676.8	5,760.0	4,032.0	2,217.6

Source: Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	141.6	24.6	-	-	-
2013	176.5	73.5	-	-	-
2014	141.6	79.1	-	-	-
2015	154.4	87.0	-	-	-
2016	202.2	114.0	66.2	18.8	9.4
2017	268.4	158.1	88.3	29.3	16.1
2018	338.3	205.9	117.7	63.5	34.9
2019	406.0	247.1	147.8	90.5	49.8
2020	487.2	285.5	172.8	112.3	61.8
2021	584.6	355.8	211.8	148.3	81.5

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	38,380	37,616	34,250	29,372	27,757	26,644	23,408	20,582	17,963	15,343
Number of regular connected TV viewers (000s)	-	-	-	-	-	-	-	-	-	-
Number of regular online video viewers (000s)	5,836	5,969	6,318	6,141	6,123	5,752	6,507	6,290	6,339	6,389

Source: SSC Ukraine, GFK, Nielsen, MMI 2018/3 + 2018/4, TNS Ukraine Monthly

Demographics

	General population	General population cities 50+	Online video viewers cities 50+
	2018	2018	2018*
Total (000s)	37,764	13,516	5,003
Gender (000s)			
Male	17,488	6,391	2,426
Female	20,276	7,125	2,577
Age (000s)			
under 16	6,381	599	237
16-24	3,530	1,566	747
25-34	5,873	3,174	1,480
35-44	5,418	3,075	1,316
45-54	5,100	2,349	735
55-64	5,116	2,368	434
65+	6,345	385	54

Source: SSC Ukraine, GFK, Nielsen, MMI 2018/3 + 2018/4, TNS Ukraine
** 12-65 years old only*

YouTube is the leading video platform, with 76% monthly reach. There are many pirate video websites that illegally show films, dramas and other TV shows. Despite the introduction of new laws to regulate them better, they are still popular, with roughly a fifth of the population using them each month. The most popular legal sources of online films are ivi.ru and megogo.net. The platforms owned by TV channels are growing in popularity, and collectively reach more than 65% of the population each month (up 126% year-on-year).

The online video audience is similar to the general online audience, watching videos being one of the most popular uses of the internet. The core audience is under-39s, with under-35s more strongly represented in the audience for entertainment, movies and music - news videos are particularly popular among the over-35s.

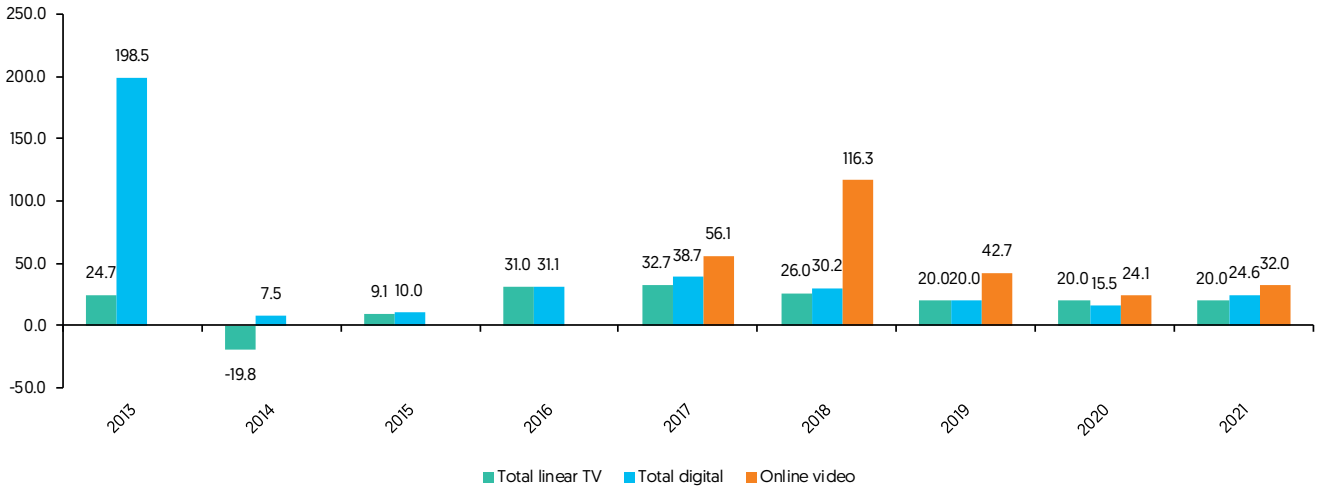
Ukrainians prefer long-form videos, with more than ten minutes of content, to short-form videos, though smartphone viewers tend to watch shorter videos than desktop viewers. Smartphone viewers are more likely to watch, share and feel connected to ads and branded videos than desktop viewers. Mobile devices now account for over 50% of total internet traffic, a proportion that has grown rapidly since the launch of 3G in 2015, and particularly since 4G was introduced in 2018.

Video ads are generally less than 20 seconds long. Shorter videos are more likely to be watched to completion, and there is no strong relationship between ad length and ad recall. In-stream formats like pre-roll ads are most popular and effective, but there is limited inventory of high-quality video, so it can be difficult to maximise coverage with these. So brands frequently use out-stream video ads embedded within the text of high-quality non-video websites to extend coverage. Video ads in social networks are also becoming more popular and are offering more inventory. According to Consumer Barometer, 51% of online video users watch video content on social networks.

Video advertising has been growing rapidly since 2013, and is expected to grow 43% in 2019 (compared to +6% for display ads). Many brands – especially FMCG companies – use video to add incremental reach to television (generally video ad budgets are around 12%-15% of the total TV budget), which remains the principal communications channel.

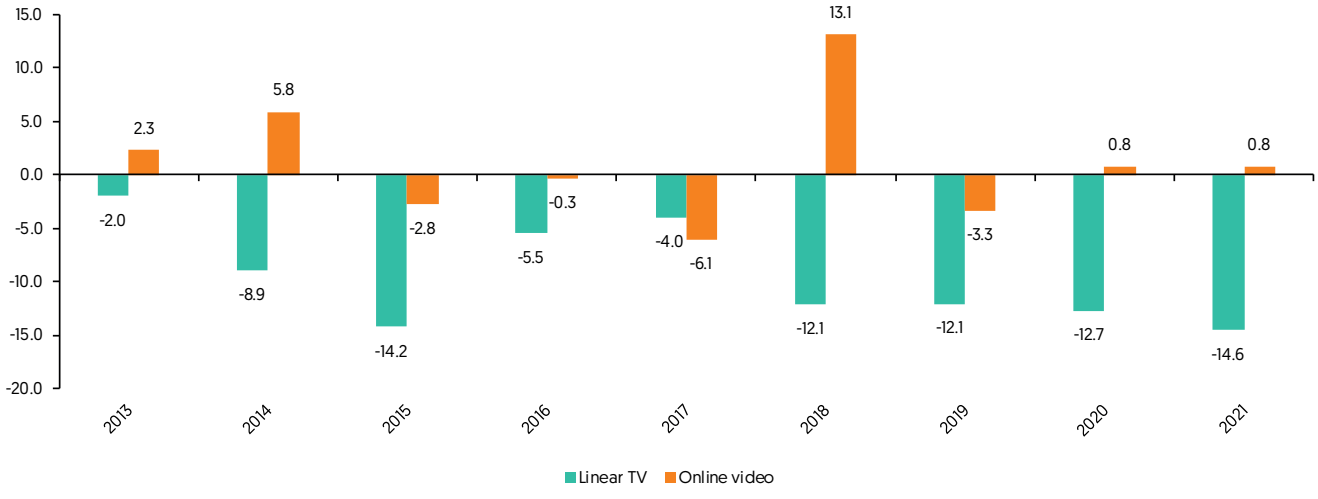
Content marketing is becoming more popular among advertisers, but only a minority have established owned video channels with high-quality branded content, which requires heavy investment in creative and production. Most brands still focus on paid advertising in online video.

Advertising expenditure year-on-year growth (%)



Source: Zenith

Regular viewer numbers year-on-year growth (%)



Source: SSC Ukraine, GFK, Nielsen, MMI 2018/3 + 2018/4, TNS Ukraine Monthly

United Kingdom

Advertising expenditure (GBP million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	3,258.0	5,551.0	1,478.0	200.0	16.0
2013	3,420.0	6,357.0	1,825.0	310.0	68.0
2014	3,632.0	7,451.0	2,421.0	471.0	179.0
2015	3,941.0	8,988.0	3,259.0	661.0	322.0
2016	3,992.0	10,230.0	3,765.0	1,098.0	694.0
2017	3,913.0	11,469.0	4,178.0	1,706.0	1,170.0
2018	3,951.8	13,356.0	5,249.0	2,307.0	1,748.0
2019	3,991.3	14,186.8	5,754.6	3,049.0	2,457.0
2020	4,071.1	15,167.2	6,295.1	3,705.0	3,084.0
2021	4,111.8	16,223.9	6,854.8	5,118.0	4,473.0

Source: Advertising Association, IAB, Zenith

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	4,351.7	7,414.5	1,974.2	267.1	21.4
2013	4,568.1	8,491.0	2,437.7	414.1	90.8
2014	4,851.3	9,952.3	3,233.7	629.1	239.1
2015	5,264.0	12,005.3	4,353.0	882.9	430.1
2016	5,332.1	13,664.2	5,028.9	1,466.6	927.0
2017	5,226.6	15,319.2	5,580.6	2,278.7	1,562.8
2018	5,278.4	17,839.6	7,011.1	3,081.5	2,334.8
2019	5,331.2	18,949.3	7,686.5	4,072.6	3,281.8
2020	5,437.8	20,258.9	8,408.3	4,948.8	4,119.3
2021	5,492.2	21,670.3	9,156.0	6,836.1	5,974.6

Source: Advertising Association, IAB, Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	57,491	57,915	58,514	58,172	59,200	59,869	60,138	60,138	60,499	60,681
Number of regular connected TV viewers (000s)	-	14,100	20,100	23,300	26,700	30,200	33,300	34,755	36,520	37,500
Number of regular online video viewers (000s)	-	-	37,184	38,605	46,533	48,045	49,486	50,724	51,739	52,412

Source: BARB, Comscore, Zenith
Monthly

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	41.4	46.1	49.3	65.0	68.9	80.0	88.0	95.0	100.7	105.6
Time spent watching online video on mobile devices	-	-	-	-	-	-	-	-	-	-
Time spent watching online video on desktop/non-mobile	-	-	-	-	-	-	-	-	-	-

Source: Thinkbox, BARB, comScore, IPA, broadcasters, eMarketer, Zenith

Advertising delivery (%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Average viewability of online video ads	-	-	-	-	-	60.5	58.8	59.8	60.4	61.3
Average proportion of online video ads that are fraudulent	-	-	-	-	-	4.7	9.6	10.4	11.4	12.5

Source: MOAT, IAS, Zenith

Demographics

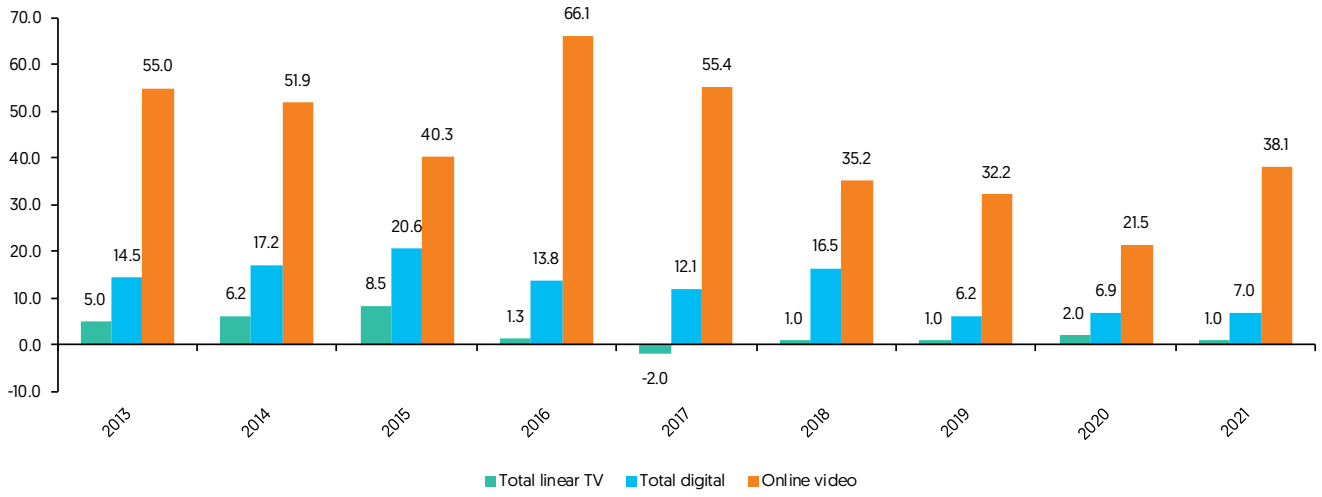
	General population	Online video viewers
	2018	2018
Total (000s)	66,465	49,072
Gender (000s)		
Male	32,576	24,993
Female	33,889	24,079
Age (000s)		
under 16	10,556	5,522
18-24	5,435	5,512
25-34	9,251	8,639
35-44	9,003	8,014
45-54	10,005	8,241
55+	22,216	13,144
Socioeconomic status (000s)		
ABC1	36,472	29,922
C2DE	29,993	19,150

Source: comScore, Office for National Statistics, BARB

Online video is driving growth in display, accounting for 44% of the total £5.25 billion display spend in 2018. Whilst television still plays a pivotal role in digital video viewing behaviour, viewing content via smartphones has increased by 45% since 2017 (most notably with younger consumers). As the quality of smartphone handsets continues to improve, coupled with the roll out of 5G this year, users will undoubtedly spend more time consuming video content on their phones in the future, therefore increasing ad opportunities available for monetisation.

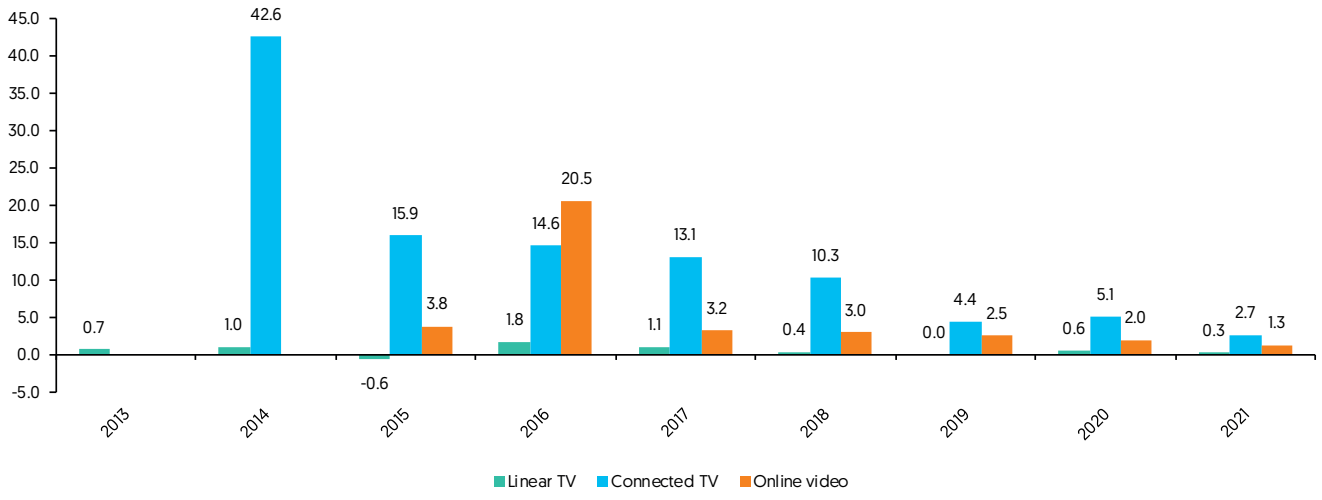
Out-stream (including social in-feed), the most prevalent placement within video, has continued to increase its majority of total video spend (up 45% from 2017) as more advertisers see the value of customising video creative for digital platforms. Comparatively, whilst pre-mid-post roll continues to increase total video spend (up 20% from 2017), when relative to the total video share of spend per placement, it is actually down 4%, illustrating TV's digitally migrating audiences. That said, though mobile video is rising fast and the perception of the demise of the television set is dramatically inflated, the prevalence of smart and connected TV units, such as Chromecast and Apple TV, means TV will continue to dominate the digital video landscape going forward.

Advertising expenditure year-on-year growth (%)



Source: Advertising Association, IAB, Zenith

Regular viewer numbers year-on-year growth (%)



Source: BARB, Comscore, Zenith Monthly

United States of America

Advertising expenditure (USD million)

	Total linear TV	Total digital	Digital display	Online video	Mobile video
2012	62,547	33,322	16,840	4,043	340
2013	64,348	39,661	21,212	5,216	659
2014	67,004	47,338	26,993	6,765	1,079
2015	66,725	56,435	34,143	8,524	1,943
2016	68,139	66,838	42,208	10,058	3,017
2017	68,457	84,125	54,987	12,894	5,802
2018	68,214	104,108	69,608	16,532	11,573
2019	67,233	120,181	81,711	20,368	14,258
2020	65,978	135,126	93,395	24,402	17,570
2021	64,890	151,700	106,204	29,126	21,262

Source: Zenith

Consumption - number of viewers

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of regular linear TV viewers (000s)	283,302	282,949	285,394	287,839	287,297	292,457	283,905	282,859	281,728	280,601
Number of regular connected TV viewers (000s)	-	-	-	-	79,701	123,605	167,157	179,595	184,983	188,683
Number of regular online video viewers (000s)	171,600	186,200	195,600	204,640	213,578	221,398	228,828	234,510	241,358	251,012

Source: Nielsen, comScore, Zenith Monthly

Consumption - time spent (average minutes per day)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Time spent watching online video	50.0	52.0	54.8	67.1	71.8	75.7	80.4	86.8	92.9	98.5
Time spent watching online video on mobile devices	15.0	22.8	25.0	27.0	29.0	32.0	35.4	27.8	27.9	28.6
Time spent watching online video on desktop/non-mobile	35.0	29.2	29.8	40.1	42.8	43.7	45.0	59.0	65.0	69.9

Source: Nielsen, comScore, Zenith. Includes OTT from 2015.

Demographics

	General population	Online video viewers
	2019	2019
Total (000s)	315,620	234,510
Gender (000s)		
Male	154,214	116,781
Female	161,406	117,729
Age (000s)		
2-17	65,870	48,253
18-24	30,660	29,257
25-34	43,260	41,556
35-44	40,760	35,983
45-54	41,140	31,682
55-64	42,060	24,719
65+	51,870	23,059
Annual income (000s)		
Over US$100,000	115,730	91,167
Under US$100,000	199,890	143,343

Source: Niielsen, comScore, eMarketer

Zenith expects digital video spending to increase on average by 21% annually to 2021. With strong inflation in the linear TV upfront amid declining ratings, advertisers are looking to digital video more aggressively.

Online video remains in high demand, with interest in quality environments leading conversations. Long tail, lower quality contexts have come under increased scrutiny, with demands for TV-like programming for TV-like dollars. We have seen fluid media planning between linear and video GRPs with shifts occurring in those areas where delivery and efficiency can be maximized.

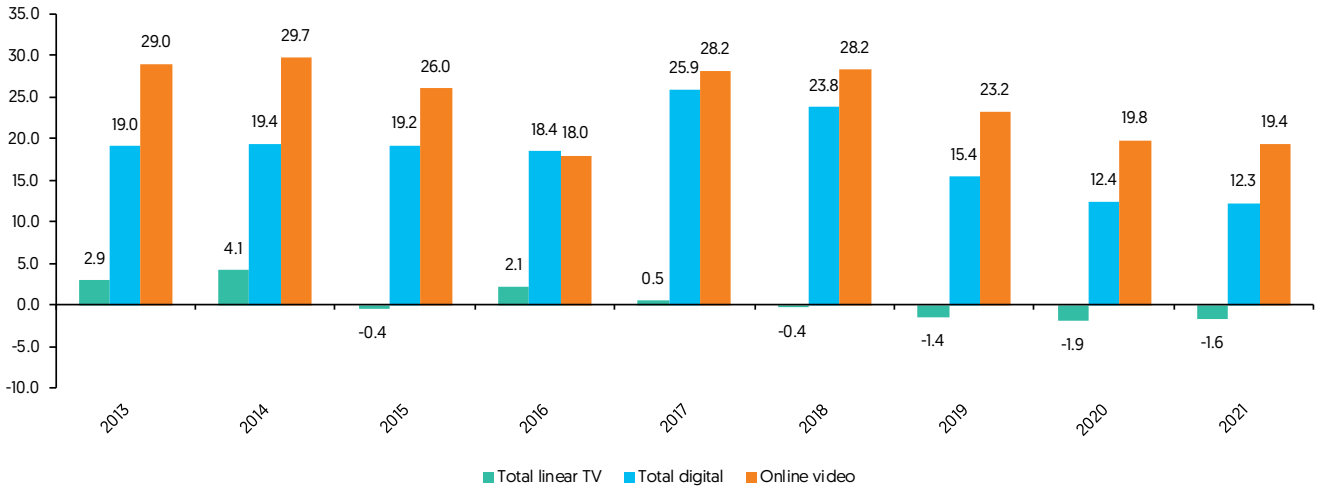
The video marketplace can no longer be neatly divided along TV or digital lines, as data, interactivity and new ad formats reshape traditional 'lean back, mass media' TV – and long-form premium content, pre/mid-rolls and commercial breaks become a digital norm.

We expect OTT/SVOD consumption to continue to grow as consumers embrace tailored content options that are on-demand, content-driven and offer flexibility.

Over-the-top (OTT) encompasses the on-demand video services (movies, TV, clips) that are delivered over the internet through connected devices, independent of a cable or satellite service provider (and their pay TV package).

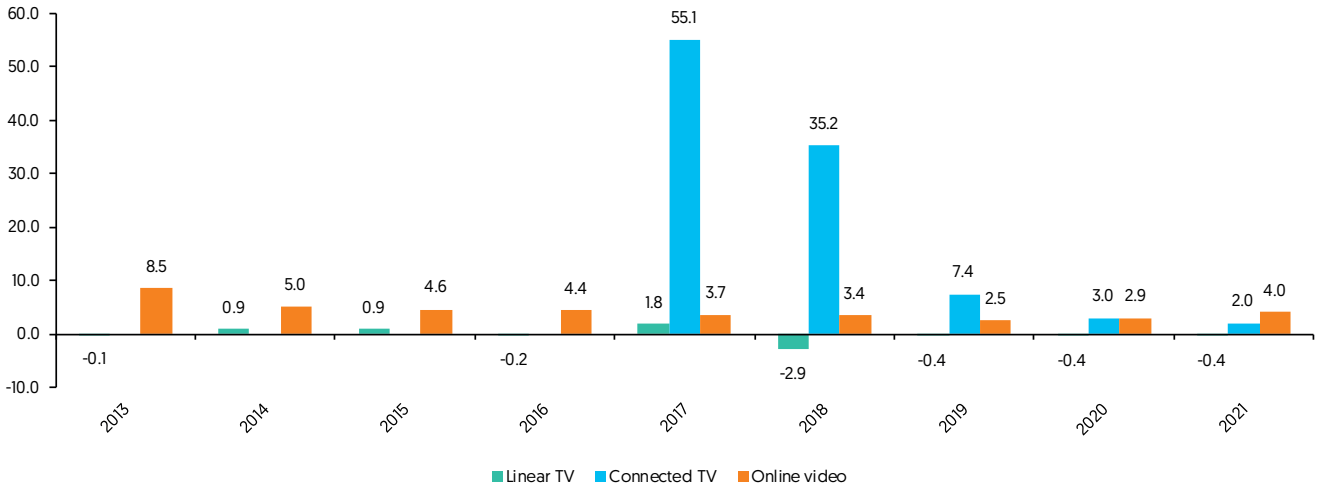
OTT video services are direct-to-consumer from individual networks like HBO (HBO Now) and CBS (CBS All Access), as well as slimmed-down multichannel TV services from the likes of Dish Network (Sling TV), Sony (PlayStation Vue), and Google/YouTube. Netflix, Hulu and Amazon Prime are the most visible OTT video services in the US.

Advertising expenditure year-on-year growth (%)



Source: Zenith

Regular viewer numbers year-on-year growth (%)



Source: Nielsen, comScore, Zenith Monthly

Online Video Forecasts 2019
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