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The video industry is evolving quickly, and the Brightcove Video Index seeks to uncover those evolving trends through data-driven insights. Through analyzing a rich dataset of hundreds of millions of anonymized video views, new insights are emerging, including usage of mobile, viewer preferences on devices, and engagement patterns. These trends inform how the video industry responds, and give us insight into what’s next.

While tablet viewers once were the emerging stars of video consumption, that mantle has firmly been grabbed by smartphone users who now watch more videos over 20-minutes long than do tablet users—or desktop computer users. Tablet users, however, still complete more long- and ultra-long videos than do smartphone users.

But, with the deployment of next-gen 5G wireless networks already happening, how long will that last? Another thing that hasn’t changed? The explosive growth of online video.

A recent Digital TV Research report indicates that the number of subscribers to SVOD services globally will double by 2024, to more than 462 million, increasing by 124 million this year alone. The biggest gains will come from companies like Netflix, which is expected to contribute 23% of the global total, along with Amazon (13%), Disney+ (8%), and Apple+ (1%). What stands out from this research is that there is an opportunity for the rest of the ecosystem to expand, with growth coming from a variety of direct-to-consumer providers.

Launching an OTT service can be a daunting experience. Launching it without enough data—and ongoing analytics—can be fatal. Knowing who your customers are, how they watch video, the devices they use, and even when they watch will help you monetize, personalize, and thrive in the OTT market. Brightcove’s Global Video Index can help you see what the rest of the industry is doing and give you a grand overview of developing trends several times a year. For weekly insights into the OTT world, take a look at the Videomind blog, which takes a daily dive into the evolving world of streaming video.

I hope you enjoy the view!

Jim O’Neill
Brightcove Principal Analyst, Videomind Editor-In-Chief
Tablet and smartphone video trends

> Video views on tablets and smartphones globally make up 53% of video views, compared to 47% for computers

> Smartphone views increased to 45% from 38% a year ago

> APAC saw mobile phone video starts top 84%

> Japan/Korea mobile phone starts reached 58%

> Middle East/Africa mobile phone video starts were 57%

> Tablets and smartphones took video share from desktop in every region but the Americas

iOS vs. Android

> iOS is losing its dominance over Android

> iOS share slipped to 36% from 44% in the past year

> Android smartphone video share increased to 68% from 59% over the past 12 months

> Android dominates in four regions, Latin America, Middle East/Africa, Europe, and APAC

> iOS dominates in three regions: Australia/New Zealand, Japan/Korea, and the Americas, with erosion in ANZ and the Americas

> Android has 92% of the video market in APAC and 70% in Europe

Engagement patterns by device

> Ultra-long-form video (41+ minutes long) made up the highest share of time watched on every device (smartphones, tablets, computers, and connected TVs)

> Long-form content (21–40 minutes) ranked second on all devices other than computers, where short-form (0-5 minutes) dominated

> Short-form video makes up the largest share of video views online

> Growth of long- and ultra-long video views Y/Y outpaced that of short- and medium-form video
THE GLOBAL PICTURE
Worldwide mobile traffic nearly doubled during 2018, and mobile video traffic is forecast to increase at a CAGR of 34% through 2024. That’s really not too surprising, as mobile video has been a significant driver of the video ecosystem since the iPad debuted in 2010 with video apps from Netflix, ABC, YouTube, and other providers on a global—and regional—basis.

As smartphones, especially, have become ubiquitous on a global scale, they’ve become a dominant screen for viewing everything from news stories and sports highlights to episodic television, movies, and sporting events. In fact, over the past 12 months, video views on phones and tablets have overtaken desktop views among Brightcove’s media customers globally, making up 53% of all video views compared to 47% for desktop computers.

Mobile phone share increased to 45.4% from 38.5% a year ago, an increase of 18% Y/Y. Tablet share was, essentially, flat at 7.5% from 7.9% a year ago. Overall video views for tablets and phones were up nearly 62% for the 12-month period. Tablets, once the perceived future of mobile video viewing, have largely been supplanted by the high-quality screens available on smartphones—even less expensive ones.
Nevertheless, even as their market share has declined, the number of plays on the devices continued to grow.

Desktop share fell 12% Y/Y to 47.2% from 53.6%, despite a 24% increase in overall plays.

The “Rise of Mobile” has been a steady one, initially driven by Millennials and other younger consumers who are decidedly mobile-first users. But older demographics have increasingly turned to mobile devices as primary screens, too.

Earlier this year, during quarterly earnings calls, both Charter and Comcast made it clear they were focusing on businesses that had higher profit margins than pay TV. Comcast, for example, said it already had made a successful “transition to a connectivity centric model.” Charter, too, made it clear video was simply a lever to “drive our core business, which is connectivity.”

A 2019 study from the Pew Research Center found that 37% of Americans say they go online primarily using a smartphone, nearly double the number in 2013. Not surprisingly, the share is significantly higher among younger adults, with 58% of 18- to 29-year-olds saying they primarily use a mobile service to access the Internet. But even the number of users 30-49 has nearly doubled to 47% from 24%, with growth accelerating even faster among 50-64s (to 27% from 6%) and users 65+ (15% from 2%).
REGIONAL MOBILE VIDEO GROWTH

There are multiple drivers for the increase in mobile video viewing. The increasing availability of premium content over the top to mobile devices—and consumers’ willingness to watch it on smaller screens—is key. And, as additional services—like Disney+, Apple+, and a slew of HBO offerings—make even more content available, more users will use mobile devices to access it.

Smartphone penetration is a major one. In mature markets like North America and Western Europe, smartphone penetration stands at 104% and 122% respectively. Central and Eastern Europe’s penetration is a whopping 141%. China stands at 114%. But even emerging markets are seeing huge penetration. APAC (not including China and India) is at 114%, the Middle East is 112%, Latin America is 102%, India is 85%, and Africa is 81%.

Of course, as new, less-expensive Android phones flood the market and the cost of mobile data drops, more users come online. In Q2, every region, except the Americas (the United States and Canada), saw double-digit growth in mobile phone video share. The regional results:

- Middle East/Africa: 57%, up from 40% (+43% Y/Y);
- Japan/Korea: 58%, up from 46% (+26% Y/Y)
- Europe: 36%, up from 29% (+24% Y/Y);
- Latin America: 33%, up from 26% (+27% Y/Y);

> Australia/New Zealand: 28%, up from 24% (+17% Y/Y);
> APAC: 84%, up from 76% (+11% Y/Y); and,
> The Americas: 23%, down from 29% (-21% Y/Y).

Add tablet’s viewing share to mobile phones, and mobile video took market share away from desktop in every market but the Americas. In three markets, share exceeded 60%: APAC (86%), Japan/Korea (77%), and Middle East/Africa (60%).

There’s no question that mobile video is firmly established in mature markets. But its real potential is in the explosive growth possible in emerging markets like those in Latin America, the Pacific Rim, and India—where emerging middle classes are pushing dramatic growth.
In India, for example, industry regulator TRAI reported average mobile data usage increased 86% to 7.7 GB/mo. in 2018, with total data traffic exceeding 20 million GB, a 131% jump since 2017. India had some 578 million mobile data users at the end of 2018, up from 424 million in 2017. India’s SVOD subscriptions, meanwhile, also increased to **140.2 million in 2019 from 28.7 million in 2017.** And even that’s expected to soar to 178.5 million in 2021.

While sizeable increases in views on most devices were routine during the past 12 months, desktop plays saw views decline in Australia/New Zealand (-3% Y/Y), Japan/Korea (-20% Y/Y), and the Middle East/Africa (-6% Y/Y). In fact, desktop share only rose in the Americas.

### The Bottom Line

The Rise of Mobile is a well-documented one as consumers embrace the idea of watching what they want, when they want, on any device they want. With next-gen 5G wireless services already being rolled out in select cities around the world, mobile devices will continue to accumulate market share. That’s especially true in emerging markets where a mobile screen may be the single screen consumers—especially younger ones—own.

The next few years will see a major expansion of wireless networks as next-gen 5G technology deploys globally. More than 10 million 5G subscriptions are expected by the end of this year, a relative drop in the bucket compared to the 1.9 billion 5G subscriptions expected by 2024, according to Ericsson. Of those subscriptions, some 95% are forecast to be for mobile broadband.

As more subscribers turn to mobile broadband to stay connected—and consume video content—it’s crucial that OTT providers look to the delivery of video to mobile devices as a pillar of their digital strategy. And, that they make sure the user experience is as clean as the one delivered to connected TVs and computers, including the ability to search and recommend content, which will help keep users engaged.
Android and iOS have dominated the video market for years, with iOS the early heavyweight because of the iPad and iPhone’s perceived ease of use.

But times have changed, even in the past year. The share of videos played on Android phones and tablets topped 64% in Q2 2019, up from 56% a year ago. iOS saw its share slip to 36% from 44%.

The increasing share was due to a big change in views on Android phones. Share of plays on Android phones was 68% in Q2, up from 59% a year ago. Smartphone share for iOS declined to 32% from 41% 12 months earlier.

Video plays on tablets remained, essentially unchanged, with iOS still dominant at 60% (down from 61% a year ago) and Android tablet plays at 40%, compared to 39% in Q2 2018.

How viewers consume videos on phones and tablets is only slightly different. They are more likely to watch a video to completion on tablets (44% of the time) than on smartphones (35% of the time). But, they’re more likely to complete a video on an iOS device versus an Android device, although the difference is small.

The average minutes spent watching video on iPhones and Android phones has increased over the past year. Viewing on Android phones rose 6% to 16.8 minutes. iPhones saw a more substantial jump of 20% to 22.3 minutes. Android still holds the edge in terms of total share of time watched at 62%.

For tablets, the story is markedly different. iOS holds the edge in average minutes watched and share of time watched overall. Both, obviously, due to the continued strength of the iPad in the market compared to other tablets.

iPad viewers watched an average of 23.8 minutes, up from 23.4 minutes a year ago. For Android tablets, the average was 21 minutes, slipping from 23.9 minutes a year earlier. iPads have a 2:1 edge over Android tablets in share of time watched. Over the past several years, tablets have become a smaller segment of the market, although they still see significant use and shouldn’t be ignored.
REGIONALLY, ANDROID LEADS iOS 4-3

iOS is the operating system of choice in just three of seven regions, and in two of those it’s seen its advantage erode in the past year.

The Americas, Australia/New Zealand, and Japan/Korea regions all see iOS as the operating system of choice. In the other four regions, it’s not even a horse race, as Android has already run away from the pack.

**In the Americas:**
Overall, iOS holds a 56% to 44% edge over Android in terms of share of videos viewed, down from 60% a year ago. On smartphone, nearly 42% of videos are on iPhones, compared to 39% on Android phones. And, iOS holds a 15% to 5% edge on tablets. Viewers average slightly more time watched on iOS devices than on Android devices.

**In Australia/New Zealand:**
iOS share was 60% in Q2, with smartphones at 42% and tablets at 18%. Those numbers were 64%, 44%, and 20% a year ago. Viewers averaged 25.9 minutes on iPads, the second most time watched on tablets in the world. They watched an average of 15.2 minutes on iPhones.

**In Japan/Korea:**
iOS actually saw its share increase, the only region in which that occurred. The share of videos watched on iOS devices rose to 67% in Q2 from 65% a year ago. Fifty-two percent of videos viewed were on iPhones and 15% of views were on iPads. iOS phone share was up from 48% and tablets down from 18% a year ago. Average viewing time in the region was huge: 40.9 minutes on iOS phones and 42.3 minutes on iOS tablets. Android phones and tablets were also strong, with average minutes viewed coming in at 39.3 and 42.4, respectively. All are highs among the seven regions.

Android, meanwhile, has an enormous lead in APAC, LATAM, Middle East/Africa, and, somewhat surprisingly, Europe, the only mature market that favors Android devices over iOS. Its edge in emerging markets is based largely on less-expensive models that have come into those markets, primarily from China. India and China both have seen huge increases in mobile consumption on Android devices.

**In APAC:**
Android’s share of videos playing on phones was 92%, up from 89% last year. Combined with a 1% share of tablet views (2% in 2018), the 93% merged total is the highest in any region. iOS phones had 6% (9% in 2018) share and tablets 1% (2% in 2018). Average minutes viewed on Android tablets and phones were 23.6 minutes. iPads saw average viewing of 20.6 minutes and iPhone was at 20 minutes. Android tablet times were actually down slightly for the year.

**In Europe:**
Android’s combined share was 70%, up from 59% a year ago. Most of that gain was in phone share, which reached 61%, up from 52% a year ago, along with a small gain in tablet share to 9% from 8%. iOS saw its total share decline to 30% from 41%, with its share of views on iPhones at 23% from 31%, and tablets at 8% from 10%. Apple’s smartphone market
share has fallen to just 14.1% in Q2 after iPhone shipments declined 17% Y/Y. Samsung, meanwhile, has grown its share of the European market, which is also seeing an influx of less expensive devices from China’s Xiaomi and other bargain brands.

**In the Middle East/Africa:**
Android’s lead is building, with 79% of videos playing on Android devices, up from 74% a year ago. In Q2, almost 77% of smartphone plays were on Android (up from 71%) along with nearly 3% of tablet plays (flat from a year ago). Share of plays on iOS phones was 18% (down from 23%) and on tablets was 3% (flat from a year ago). Still, the average minutes watched on iOS devices was just slightly higher than on Android devices.

**In Latin America:**
More than 79% of video plays were on Android devices (up from 74% a year ago). More than 77% of videos were watched on Android phones (up from 71%), along with 2% of tablet plays (down from 3%). iOS plays on phones accounted for more than 17% of plays (down from 21%), and tablets saw 3% of plays (down from 5%). Average minutes watched on iOS devices was marginally higher than on Android devices.
THE BOTTOM LINE

Apple’s iOS is facing a couple of major challenges globally over the next few quarters: 5G and low-price challengers.

While Android-based competitors Samsung, Oppo, LG, Xiaomi, and OnePlus all have released next-gen 5G wireless devices—with more on the way—Apple hasn’t. And, while, at least one of Apple’s models to be released in 2020 will support 5G, the company’s delayed market entry could push Android to the forefront even more, as consumers look to take advantage of the speed and bandwidth benefits 5G offers. And, especially in emerging markets, a lower-cost option to the iPhone is hugely popular.

Regardless, the dominance of the Android platform globally means video distributors need to make certain content is maximized for both operating systems and for all of the related devices.

Knowing individual market trends is crucial; having access to detailed analytics that provide actionable business insights can be the difference between success and failure.

In terms of operating systems, the days of being able to roll out an app for the iPhone or iPad and believe that you had the market covered are gone. Even in iOS strongholds like the Americas, Australia/New Zealand, and Japan/Korea, the increased reliability, ease of use, and lower cost of Android devices is having an impact. While there’s no doubt iPhones and iPads remain major players in the video market, they no longer hold the caché they once did.

Video providers must have an option for Android users or risk losing customers—particularly in emerging markets.
“Screen democracy” is a term we’ve often used to explain the consumer trend to use the screen at hand as their primary one. On a commuter bus and want to catch up on the latest sports highlights? Watch them on your smartphone. Need a Walking Dead fix but Sunday Night Football is on all the big screens in your house? There’s always a tablet. And, of course, there’s always something to watch on your laptop.

Downloadable content, more reliable Wi-Fi (with low-latency 5G delivery on the near horizon), high-resolution smartphones, and content owners’ willingness to go wherever their customers are has pushed an increasing amount of content onto the smallest screens.

**Short-form video (0–5 minutes long)**
There are more pieces of short-form video—news stories, sports highlights, trailers for movies, and the like—online than any other category of video, by a very-large margin.

Not surprisingly, in sheer number of assets, they make up the largest number of videos watched on smartphones, tablets, and computers—and their share of time watched on each screen has stayed relatively consistent in the past year. In Q2 2019, they made up about 6% of time watched on computers (flat from a year ago), 8% on smartphones (again, unchanged), 3% on tablets, and 3% on CTVs (both, essentially, flat from a year ago).

**Medium-form video (6–20 minutes long)**
For medium-form video (think sitcoms and other half-hour shows), it appears viewers are pretty much agnostic as to screen size. It made up about 6% of time watched on computers (flat from a year ago), 8% on smartphones (again, unchanged), 3% on tablets, and 3% on CTVs (both, essentially, flat from a year ago).

**Long-form video (21–40 minutes long)**
For long-form content (episodic TV is a good example), time watched ranked second highest on every device but computers. On smartphones, 31% of time watched was long-form (up from 29% a year ago). CTV followed at 27% (flat Y/Y), and tablets were at 24% (also flat Y/Y). On computers, long-form time watched was 16% (also flat from a year ago).

**Ultra-long-form video (41+ minutes)**
Good examples of ultra-long-form video include movies, documentaries, events, and sports. And, the category made up the lion’s share of time watched on every device by a significant margin. As you’d expect, 70% (up from 69% Y/Y) of time watched on CTVs was ultra-long-form, with tablets at 66% (down from 67%), smartphones at 52% (flat Y/Y), and desktops at 42% (down from 46%).

Overall, the expansion of long- and ultra-long-form video views outpaced that of short- and medium-form, which is to be expected as more video providers move more high-value assets over-the-top. It’s also interesting to note that short-form video, once a fixture on mobile phones, now appears to be more at home.
on computers (by a 2:1 margin), with smartphones seeing growth in excess of 62% in the number of video views for all lengths of content—except short-form, which grew at a still respectable 44%.

**THE BOTTOM LINE**

Increasingly, data shows that the most important screen for video viewing is the one that’s most convenient, whether that convenience is based on proximity, cost, or the robustness of a network. In many markets, mobile isn’t just one of the options for viewing, it’s the primary option. And the length of the content—as the numbers make clear—is just as flexible.

The trend toward mobile-centric video is continuing, although it’s clear that consumers really don’t discriminate against any sized screens when it comes to watching video.

Every screen presents opportunities, and that’s important to remember whether your content is 50,000 short video clips, 500 movies, or a season of pretty much any sport. Expecting your content to be watched on any one screen is a mistake—consumers will watch it on the screen at hand.

We’ve said it before, but it bears repeating: Make sure your content is as at home on a six-inch screen as it is on a 60+ inch screen. Focus on any one screen and you’ll be passing up opportunities to grow your business.
ABOUT BRIGHTCOVE AND BRIGHTCOVE’S GLOBAL VIDEO INDEX

Brightcove Inc. (NASDAQ:BCOV) is the leading global provider of powerful cloud solutions for managing, delivering, and monetizing video experiences on every screen. A pioneering force in the world of online video since the company’s founding in 2004, Brightcove’s award-winning technology, unparalleled services, extensive partner ecosystem, and proven global scale have helped thousands of companies in over 70 countries achieve better business results with video. To learn more, visit www.brightcove.com.

The Brightcove Global Video Index report reflects the anonymized, aggregated, online video metrics of Brightcove customers, whose collective audience of hundreds of millions of viewers spans nearly every country in the world. This report does not document the online video consumption patterns of the Internet as a whole. But the size of Brightcove’s video footprint, along with the variety of our customers, delivers a representative view of global consumption and engagement trends.