GLOBAL VIDEO INDEX
Q1 2020
EVERYONE@HOME
To write anything about the first quarter of 2020 without focusing on the coronavirus pandemic would be, well, ridiculous. Every aspect of our industry – of our world – has been changed. But video remains a focal point for business, retail, news and, of course, entertainment.

The pandemic swept across the world like a wave across the ocean, arriving on the shores at different times and with differing results.

Surprisingly, COVID-19 didn’t reach crisis levels in some of the countries closest to its source as quickly as it did in countries – literally – halfway around the world. Just weeks after its outbreak in China, it had overwhelmed hospitals in Italy, while Japan didn’t declare a state of emergency until weeks later.

Stay-at-home edicts and social distancing made “home” the true center of our worlds. And as our children homeschooled, played video games, and chatted with friends, workers moved laptops to dens or spare bedrooms (or any flat surface with Wi-Fi) to stay connected and productive.

Video took on – and continues to take on – more importance. During the day, video chats were a line of communication to work teammates; company leadership increasingly communicated in company-wide “broadcasts” across the internet, and deals continued to get done. Video made “business as usual” possible. Video education became a norm, with teachers, many of whom were new to the technology, bringing structure and new methods to bear.

In the evening, virtual family meetings – or wine with friends – maintained and, in some cases, strengthened communal ties.

And, of course, the television in the living room again became a family gathering place – first to watch the news, where there were dramatic increases in consumption globally.

At night, after we had enough of the grim race of death across our communities, it provided a respite – and a sanctuary.

Globally, consumption of streaming video on almost all devices saw dramatic gains. Even sports viewing – there were sports? – saw gains through most of the quarter as we sought some form of normalcy.

Broadcasters in the U.S. reported significant month-over-month gains in viewers. But, in a nod to the pace of change in how we watch video, the season finale of “This is Us,” had its biggest audience of the year, but still, 4% fewer viewers than it had a year ago.

Streaming has become a way of life for an increasing number of consumers with more options coming to market. After a huge initial launch in November, streaming service Disney+ expanded its international launch and Quibi, a mobile-only streaming service, both launched in the first four months of the year, and there are several other high-profile launches still to come.

Both services were buoyed by long-term free trials. Disney+ allowed a year-long trial for Verizon customers who had one of its “Unlimited” plans. Quibi simply offered everyone three months for free.

A better indication of how hot streaming was during this phase of the pandemic? Netflix added more than 15.77 million subscribers in the first quarter... its biggest piece of new business ever.

But here’s the key point of this streaming splurge... consumers aren’t going to go back to where they were before the pandemic.

A quick story: I was managing editor of a newspaper a couple of decades ago when I first heard industry “experts” assure newspaper management that the younger readers who were turning to the internet for news, classified ads, and display ads wouldn’t stay...
away forever. These errant soothsayers predicted that once these young consumers grew older, got married, had kids, bought houses, and started paying taxes they’d come back to newspapers.

We all know how that worked out.

And, just like with newspapers, all of these new streamers aren’t going back to broadcast or cable TV. They’re here for good and will help bring others along.

The main story of the first quarter of 2020 has been the pandemic and its impact on our world. One footnote, however, will be that it also helped accelerate the evolution of the audience and the video industry.

Stay tuned – and stay well.

Jim O’Neill
Brightcove Principal Analyst
Editor-In-Chief, Videomind
COVID-19’S IMPACT ON ENTERPRISE VIDEO

91% Y/Y increase in video views.

173% Y/Y increase in time watched on connected TVs for content <20 minutes long.

35% Y/Y increase in time watched.

March saw the largest gains in views and time watched.

RETAIL & MARKETING VIDEO CONSUMPTION

135% rise Y/Y in retail and marketing views despite COVID-19’s spread.

18% increase in time watched.

253% rise Y/Y in smartphone views and 143% Q/Q.

188% Y/Y rise in video views in Europe. In N. America they doubled.
COVID-19’s Impact on News Video

- 47% increase in news video views.
- 57% increase in news video consumption in Australia/New Zealand.
- 4x increase in news viewing time in U.S.
- 58% growth in news views in the Middle East/North Africa region.
- 417% increase in views on connected TVs in the U.S.

Media & Entertainment Trends

- Smartphone growth stuttered as more viewers stayed home.
- Y/Y rise in views of media, entertainment, and sports in North America: 19%.
- Smartphone share in Asia Pacific; in MENA share hit 66% and in Latin America, 62%.
- Video view share on computers increased slightly.
- Y/Y increase in video views in Asia Pacific: 67%.
- Completion rates for all media in North America (the highest): 54%.
THE GLOBAL PICTURE

Business is about communication – staying connected to customers, suppliers, employees, and the public in general. But in Q1, we encountered a new kind of video comms need. Before stay-at-home orders even began to be handed down from governors, companies already were cutting travel and offering employees expanded work-from-home options.

Video viewing saw year-over-year (Y/Y) and even month-over-month growth as enterprise turned to video to replace travel, annual conferences, company-wide meetings, and even casual meetings among employees.

Year-over-year gains in enterprise video views were substantial, increasing more than 90%. Time watched was up about 35% as well. Content less than 20 minutes long saw the biggest gains on computers. Time watched was up 42% Y/Y, with the number of views up 12%.

On mobile devices, as with computers, shorter content saw bigger growth in time watched and more views. Time watched increased by 57% and views by 65%. Tablets also saw growth in time watched and video starts for sub-20-minute content - 27% and 7% respectively. Longer content actually saw virtually flat growth in time, just 1%, and a 23% drop in views, the only decline in views in the category.

The biggest growth, not surprisingly, came on connected TVs. Time watched for shorter content was up 173%, with views up 239%. But it was time watched for longer-form content that saw the biggest growth, a whopping 310%. The number of views almost doubled, up 90% year-over-year.

But, make no mistake, shorter-form video on computers made up the bulk of time watched and of video views, 69% and 70% respectively in the quarter. Runner up? Smartphones, at 25% and 27% respectively. In fact, enterprise content was on an island in terms of streaming video time watched and views… it’s the only vertical that remained flat (time) or grew (views).

MONTH-OVER-MONTH GAINS

Looking at month-by-month usage reveals an interesting picture of how the health crisis evolved the communications pipeline. While January and February saw increases in video views of 81% and 78% respectively, March saw a more significant gain of 111%. 
Views on **computers** in March were up 137%, while views on **connected TVs** nearly tripled, +288% from March 2019. **Smartphones** saw March views increase 70% Y/Y, the biggest monthly increase for the device in the quarter, and views on **tablets** were up 47%, compared to declines in each of the previous months.

Clearly, the largest screens in the home, connected TVs and computers, were used most often to communicate in the enterprise space.

Computers, as one would anticipate, had the largest share of views in March – 70% – followed by smartphones, with 25% share of video views.

The amount of time watched increased in all three months over the previous year. Time watched was up 24% in January, 17% in February, and March time watched increased by 62% as more businesses had employees work from home.

Gains were significant on every device. Year-over-year, **connected TVs** saw >200% growth in every month. Time watched on **smartphones** also grew in every month, with March seeing the biggest increase Y/Y of 72%. **Tablets and computers** also saw time watched increase by 73% and 58% respectively in March.

In terms of total time watched in March, computers accounted for 70%, smartphones 23%.
THE BOTTOM LINE

Video has always played an important role in communication among enterprises, but the COVID-19 pandemic elevated it to a far more important one. Instead of simply being an easy way for teams to communicate or for companies to reach large groups of employees, during the pandemic it became a vital conduit of truth that employees, executives, customers, and vendors turned to for up-to-the-minute information about how the crisis was being handled.

For C-suite executives, it was a simple and effective way to maintain morale, focus, and drive basic company tenets. Sales forces were able to stay in front of prospects and customers, making sure that business didn’t come to a standstill.

A number of companies even used video to host virtual events, as the usual array of annual industry gatherings were canceled.

So, where do we go from here?

Like streaming video in general, corporate comms has been forced to evolve during the pandemic.

That evolution has included increased usage across all facets of business, and it’s been an easy process to provide scalable, secure video.

Look for enterprise to continue to adopt video as a primary way to do business. Is business travel dead? Will business travelers feel comfortable jumping onto a packed flight? Not likely.

Enterprise video is on a hot streak, and companies that don’t take advantage of it are in for a difficult time moving forward.
Retail and marketing video views grew in Q1 despite the emergence of the coronavirus. As the virus became a pandemic, retail and marketing video consumption grew late into the quarter. Video views globally increased by 135% year-over-year (Y/Y), and the growth between Q4 2019 and Q1 2020 was nearly as robust, at 108%.

Time watched globally grew just 18% Y/Y, but the growth between Q4 2019 and Q1 2020 was more than 3 times higher at 68%.

The biggest Y/Y growth in views occurred in Europe, which was up 120%. The amount of time spent with retail and marketing content in Europe also increased 26% Q/Q. Growth in North America was highest at 159%, with time watched increasing 75%.

Video views were essentially flat between January and February; March activity drove growth up 21% over the first month of the year. Percentages aside, the actual number of video views saw a small increase from
January to February, but a much larger one in March, which had 36% more video views than January.

One reason for the uptick? As evidenced later in the report, streaming video viewing in all regions — especially of news and ad-supported entertainment content — simply saw significant growth over the period as consumers turned to watching video. Retail and marketing video simply went along for the ride. As the pandemic intensified, ad spend began to decline. Consumers turned to videos about products and companies instead. We'll likely see an even bigger increase in video views for April and May.

**SMARTPHONES REMAINED THE DEVICE OF CHOICE**

In Q1, smartphones saw the biggest Y/Y increase in retail and marketing video views (+253%), and also saw time watched increase 83% in the quarter, as consumers continued to use smartphones to watch on the go, in stores, and at home. Smartphones also saw the biggest Q/Q increase in views (143%) as time watched increased 145%.

Computers also saw an increase in video views, up 20% over Q1 2019 and 37% over Q4. But time watched was a different story, remaining essentially flat year-over-year and seeing just 7% in viewing time over Q4. Interestingly, although tablets saw decreases in Y/Y video views and time watched — down 7% and 9% respectively — both metrics saw big increases in Q/Q comparisons.

For the year, time watched was up 67%. The quarterly increase, meanwhile, was more than 3X as big at 224%.

Obviously, tablet viewers saw a different mix of content than smartphone users, including lengthier retail and marketing content. In Q1 2020, tablet users viewed retail and marketing content to completion far more often than smartphone users (39% to 15%), which had a huge impact on time watched in the segment. In Q4 2019, tablets also saw more completed retail and marketing content vs. smartphones (46% to 28%), a gap that's been fairly constant for the past several quarters.

**Connected TV** views and time watched were down year-over-year, -26% and -29% respectively, although it’s likely to change as the pandemic goes forward. Data from an array of Brightcove’s biggest customers show that while connected TV views and time watched showed some growth between January and February this year (views increased <1% and time watched 36%), as more viewers sheltered in their homes those numbers soared. Between February and March, views more than doubled, while time watched increased 2.7X. Obviously, if the pandemic remains a threat and viewers remain indoors, more content will continue to be consumed on bigger screens.

**REGIONAL RETAIL & MARKETING VIDEO TRENDS**

Despite the worsening pandemic as we moved through Q1, virtually every region saw Y/Y increases in the amount of retail and marketing video views, with smartphones collecting the highest share.

Neither development is surprising. Most of the world saw a late-quarter impact from COVID-19, in some cases not until the last two weeks in March.
NORTH AMERICA:
Overall video views doubled, with smartphones seeing an increase of 201% and an overall share of 76%. Computer views increased by 2% and accounted for 20% of all views. Tablets and connected TVs (CTVs) both saw a decline in video views, 9% and 36% respectively, with tablet share slipping from 8% to 4% in the past 12 months. CTVs’ share was 1%, down from 2%. The completion rate was highest on computers (50%) and tablets (40%).

AUSTRALIA/NEW ZEALAND:
Retail and marketing video views increased by 50%. Smartphone views increased by 98% and earned a 67% share, up from 51% a year ago. Computers saw views increase 13% and lost share to 27% from 36%. Tablet views declined 35% and share fell to 5% from 11%. CTV views dropped 37% with share at 1%, a decline from 2% a year ago. Completion rates were twice as high on tablets as on smartphones, with computer completion rates nearly as strong.

ASIA PACIFIC:
Retail and marketing views on smartphones saw a >10X increase from a year ago, with share bouncing to 92% from 57% last year and 87% last quarter. Tablet views increased 80%, but still make up just 1% of all views. Computer views also were up, but the 60% increase only gave computers a 7% share of views compared to 38% a year ago. Completion rates were universally low in Asia-Pac, with connected TVs and computers leading at 25% each. The overall 12% completion rate (weighted heavily by a smartphone completion rate of just 11%) was the lowest in the world.

EUROPE:
The 188% increase in smartphone views helped the device build share to 67%, from 51% a year ago. Computers also had a strong quarter, increasing views to 66%. But share of views still dropped to 28% from 37% because of smartphones’ surge. Neither connected TVs (views down 18%) nor tablets (down 3%) managed any growth in the quarter, with tablet share declining to 4% from 10% and CTVs share remaining at 1%. Completion rates were highest for tablets (36%), followed by computers (33%) and CTVs (32%). Smartphone completion rates were 22%, in line with global rates kept low by wholesale use of ad blocking software.

JAPAN/KOREA:
Growth in smartphone views was consistent with the rest of the world, as the device saw gains top 123% and share rise to 64% from 46% last year. Connected TVs saw views increase 43%, but share remains just 1% in the markets. Computers also saw an increase in views over the year. But the 14% increase couldn’t help it maintain share, dropping to 30% from 43% a year ago. Tablets were the only devices to not increase video views in the quarter, tumbling 13% from a year ago and closing the quarter with a 5% share, down from 10%. Completion rates were highest for tablets (47%) and lowest for connected TVs, which had the lowest completion rates for CTVs globally at just 20%.

LATIN AMERICA:
The region saw the lowest growth rate for video views in the world (26%), and that gain was driven by smartphones, which increased views 61% and netted a 64% share in the quarter, up from 50% a year ago. The only other device to see video views increase, connected TVs, jumped 17%. Nevertheless, share remained at 1%. Losers in the quarter were tablets (down 12%) and computers (down 9%). The decline in views pushed computer share to 32% from 44%, while connected TVs were stable at 1% share. Completion rates for retail and marketing content were highest for tablets (43%) and computers (41%). LatAm viewers watch retail and marketing content to completion more than those in any other region. The 35% is just ahead of MENA’s 34%.

MIDDLE EAST/NORTH AFRICA:
Just ahead of LatAm, MENA had a 35% increase in retail and marketing video views. The gains, as in other regions, were led by smartphones, which saw an increase of 114% to earn a 65% share, up from 41%. Connected TVs also saw views increase (19%), but share – because of smartphones’ dominance – declined to 2% from 3% a year earlier. Computers saw video views fall 23%, which caused share to slip to 31% from 53%. Tablet views also saw a decline of about 14%; share fell to 2% from 3%. As mentioned earlier, completion rates are relatively high compared to the rest of the world at 34% overall. The 64% completion rate on computers is the highest rate among all devices in all regions by 17 percentage points. Rates on smartphones, though, are among the lowest in the world.
THE BOTTOM LINE

A majority of marketers and brand managers late in Q1 said the COVID-19 pandemic forced them to rethink their ad spending, prompting them to pull back spend on traditional linear TV, pay TV, and, to a lesser extent, streaming video. Most said they were more optimistic about streaming video because it allowed them to be nimble, unlike traditional outlets, in terms of adjusting spend and campaigns. But they remained concerned and, obviously, conservative.

The impact of COVID-19 on streaming video for retail and marketing video views, though, has been mixed. On the one hand, there’s a lot more video being watched by consumers who have an extra 4.35 hours available each week simply because they’re not commuting the US average of 26.1 minutes each way to work.

As a result, marketing content that is available online is being seen. And that, as most marketing experts will tell you, is critical. The worst thing a brand can do is to go silent and hibernate while the world goes on around them.

Choosing the right content to market your brand is going to be hard for a while, but it’s critical that you remain on consumers’ radar, especially when video is so much of a focus.
All over the world, the COVID-19 pandemic drove news consumption as consumers used every device they had to drill deeper into breaking news at home, work, school, and on the go. **Globally**, news video views increased by 47% Y/Y, and time spent watching news grew 32% Y/Y.

How the world watched the pandemic was different than it had been in previous quarters.

Video views on all devices grew, but where, in the past several quarters, much of the growth was driven by smartphone consumption, viewers turned to bigger screens. Connected TVs saw the largest growth, nearly doubling Y/Y. The 94% was three times the Y/Y increase in news streaming to connected TVs in Q4. News views on smartphones increased by 58%, compared to a Y/Y 88% increase in Q4. Views on computers rose 45% and tablets saw a 15% increase.

In terms of share of views, smartphones continued to lead with 57% of all news views, the first quarter since Q4 2018 where share didn’t increase. Computers had a 34% share, flat Q/Q and the first time computers didn’t lose share since Q3 2018. Tablets had an 8% share, as they have in every quarter but Q2 2019 (9%), and connected TVs doubled share to 2%.

In **North America**, the number of video views increased just 29% in the quarter, but time watched more than doubled, growing 125%. Interestingly, the biggest gains in views were on connected TVs (+247%) and computers (+116%). Tablets were up 45% and smartphones just 1%. As with other devices, consumers increasingly turned to larger screens as the pandemic worsened and stay-at-home directives increased. Time watched growth was even bigger. Three devices saw triple-digit jumps in the quarter, with connected TVs (+254%), tablets (+174%), and smartphones (+119%); computers saw time watched increase by 76%. Smartphones had the biggest share of video views (56%), followed by computers (30%). Viewers spent about 34% of their time watching videos doing so on smartphones.

### U.S. SEES 4X GROWTH IN TIME SPENT WATCHING NEWS

In the **United States** time spent watching news during Q1 increased 320%, while video views were up just 53%. Americans tuned in to watch more in-depth reporting on the virus and watched streaming news programs to completion more often.

#### Q1 2020 US NEWS VIEWS, TIME WATCHED (DEVICE)

<table>
<thead>
<tr>
<th>Device</th>
<th>Views Y/Y</th>
<th>Time Y/Y</th>
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</thead>
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<td>53%</td>
<td>120%</td>
</tr>
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<td><strong>TV</strong></td>
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<td>477%</td>
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<td><strong>Tablet</strong></td>
<td>115%</td>
<td>583%</td>
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<tr>
<td><strong>Smartphone</strong></td>
<td>7%</td>
<td>265%</td>
</tr>
<tr>
<td><strong>Computer</strong></td>
<td>306%</td>
<td>356%</td>
</tr>
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As the virus spread and news of the pandemic worsened, more states and cities issued stay-at-home orders in an effort to
News viewing in the **Australia/New Zealand** region saw a 57% Y/Y increase in Q1, with smartphones seeing the biggest increase (77%). Computers (54%) and connected TVs (52%) also saw strong growth, with tablets adding just 1% Y/Y. Australia already had big increases in news streaming during Q4 as wildfires roared across the country. Connected TVs saw a big gain in terms of time watched (+65%), followed by desktop computers (+53%). Despite smartphones seeing a big gain in video views, the device actually saw time watched fall (-16%) in the quarter compared to a year ago. More than half of all time watched (57%) was on computers.

Viewers in **Europe** increased their views of news 47%, with gains on every device in Q1. Connected TVs saw the biggest gains, about 323%, followed by smartphones (71%), computers (38%), and tablets (17%). Time spent watching news saw a more modest gain of just 28%. Smartphone time watched was up 48%, with computers seeing an increase of 26%. Share of views remained the purview of computers (55%) and smartphones (36%), with tablets (8%) and CTVs (1%) seeing fewer than 10%. Time watched share saw a similar breakdown, although computers controlled 60% of time watched and smartphones 29%. Tablets had a 12% share with connected TVs under 1%.

The **Middle East/North Africa** region was the only other one to record an increase in news content consumption. Smartphone views more than tripled (up 224%), while views on CTVs increased 170%, and views on computers doubled. Even tablets saw big gains – about 85% Y/Y. News views on smartphones increased to 69% from 58% a year ago. Computer plays declined to 27% of all news views, down from 37%. Tablet video view share ended the quarter at 3%, down from 5%, and connected TV views are still under 1% share. In terms of time watched, there was positive gain across all devices, with time watched on smartphones up 142%, connected TVs up 119%, computers seeing a gain of 45%, and tablets up 38%. Smartphone share of time watched was 55%, with computers at 40%. Tablets saw share of time watched slip to 5%, with CTVs under 1%.

**Asia-Pac and Japan/Korea** both saw news viewing decline in the quarter, -60%, and -13% respectively. News views fell across all devices in Asia-Pac, with time watched dropping on every device but connected TVs, which saw views increase 17%. Asia-Pac video views were dominant on smartphones, with a share of 82%. Share of time watched also was highest on smartphones at 78%. Computer views and time spent share was 16% and 19% respectively.

**Latin America** saw news consumption fall on all devices but connected TVs, which increased 75%. Smartphones remained dominant in terms of share of views at 64%.

“flatten the curve” of COVID19’s spread, a strategy aimed at easing potential strain on hospitals. By March 23, just nine states had issued blanket stay-at-home orders to Americans in an effort to help minimize the spread of the COVID-19 virus. By March 26, that number had reached 21, and by March 30, there were 30 such orders.

The pandemic prompted Americans to watch news for longer periods of time; it also changed the devices on which they watched.

During the first full week of March (3/3-3/9), before there were any stay-at-home orders issued, more than two-thirds (69%) of news video views were on mobile devices (smartphones and tablets). And, those mobile devices saw 62% of viewing time. One-quarter of views (27%) were on computers and just 4% on connected TVs. (Each had about 19% of total time watched.)

Americans gradually shifted more of their views and time watched to larger screens at home, with computers seeing 3X growth in the number of videos watched and connected TV viewing rising 38%. Views on both smartphones (109%) and tablets (113%) more than doubled. Mobile devices maintained the lion’s share of views (57%) and time watched (55%).

The biggest single date for streaming viewing in the U.S. during the first quarter was March 13, when a national state of emergency was declared in the United States. Overall, viewing increased more than 200% in March over March 2019.

This year, between the first week of March (2/28-3/5) and the last week of March (3/20-3/26), the time viewers spent watching news increased 50% in the U.S., while the total number of news views increased more than 70%.

The difference was bigger year-over-year, with time spent watching news March 20-26 more than doubled, increasing 130%. The actual number of videos viewed during that period was up 78% year-over-year.

During the entire first quarter, time spent watching news in the United States increased 261%, with views up 38%, compared to Q1 2019.

**THE BOTTOM LINE**

The COVID-19 pandemic has viewers glued to their video screens, most often watching on smartphones (more than 53% of all views), although time spent on connected TVs per session was 15X as long as on smartphones.

Not only are viewers watching more news, they’re watching it twice as long as they did before the COVID-19 pandemic. And, over the first three months of this year, news viewing increased in every month year-over-year and increased dramatically as COVID-19 news dominated the airwaves.
THE BOTTOM LINE

As the coronavirus spread across the world – being declared a pandemic in mid-March – media news organizations and publishers discovered consumers were hungry for news, and many traditional broadcasters turned to streaming to provide more content than they were able to within the rigid constraints of broadcasting and pay-TV distribution. News will continue to grow through April as consumers’ hunger for content continues. Mobile delivery – on smartphones and tablets – generally saw small declines in views and time watched as March closed. The reality is that the trend will continue as long as stay-at-home rules are in effect across the world. April, and perhaps May, will see those declines continue. But consumers spending more time at home will spend a good share of it in front of connected TVs and computers. Overall, news content increases in viewing and time spent should be substantial.

GLOBAL NEWS VIDEO VIEWS

47%
MEDIA & ENTERTAINMENT VIDEO TRENDS

MOBILE DEVICES LOSE SHARE TO COMPUTERS

After six consecutive quarters of growing video share for smartphones, Q1 2020 saw the growth come to an abrupt halt. Blame the coronavirus pandemic, as consumers increasingly worked from home, learned from home, and increased their consumption of video overall.

Smartphones’ share of video views decreased from 54.6% in Q4 2019 to 53.4% in Q1 2020. Tablets, which saw their smallest share of video in Q4 (7.8%), regained some popularity among consumers in the first quarter, gaining a small piece (0.3%) of share back. Share of video views increased on computers to 38.5% from 37.6% in the quarter. In Q2 2018, computers had a 49.1% share of all video views.

Year-over-year, smartphone views still increased by 47%, while computers were up just 6%. But, between Q4 and Q1, smartphone plays increased just 36%, trailing increased views on computers (42%) and tablets (44%). (Overall, video views increased 39% from Q/Q.) Simply put, consumers who had been committed to watching video on their smallest screens changed course as the COVID-19 pandemic kept them inside, returning to their biggest screens.

Looking at the change week-to-week, there’s a marked falloff in mobile views during the first two weeks of March, and an even bigger decline over the final two weeks of the month.

GLOBAL: DEVICE SHARE OF VIDEO
(VIEWS 2018-2020)
ALL DEVICES – REGIONAL

NORTH AMERICA:

Video views for entertainment, news, and sports on all devices increased 19% in the quarter from a year ago. Connected TVs saw video views increase 277%, enough to double the devices’ share of views to 2% from 1% in Q4. But the number of assets viewed on CTVs remains small in comparison to other devices, primarily because the bulk of views on CTVs are longer-form content (in excess of 21 minutes), while smartphones, computers, and even tablets see many more pieces of content less than 20 minutes long. Interestingly, completion rates on connected TVs, despite their longer-form, often premium content, remain the lowest in the world, just 17%. Some of that may be due to the way we count “completion,” requiring more than 80% of an asset to be watched to fit that category.

Smartphones, meanwhile, saw video views increase 77%, behind only Asia-Pac and Europe in terms of pure numbers. (North America in Q1 had the second-highest number of assets viewed on smartphones, behind only Europe). Share of video views on smartphones was 37%, down from 40% last quarter, and an indication that COVID-19 is changing streaming viewing habits in North America. Look for April and May to show steeper losses in share. Completion rates for content on smartphones was 44%, ahead of completion rates for most of the world. (Only the Middle East/No. Africa had a higher completion rate for smartphones, at 46%).

Tablets also saw the number of assets streamed increase, up about 16% from a year ago and up 11% from Q4. Much of that gain came in March as the pandemic drove more viewers inside, where the tablet screen may have been seen as the “next best thing” to bigger TV screens. But share declined to 6% from 7% regardless, part of a long-term erosion in popularity. Completion on tablets for most content was 50%, the same as Q4 but down from a year ago when it was 56%.

Computers saw a decline of 3% in plays Y/Y and a 28% decline from Q4. Share was down to 56% from 68% over the past year but is showing some gains (from 52% in Q4), likely as a result of the COVID-19 pandemic. Completion rates on computers are high: 62% in Q1, up 2% from Q4 and a whopping 10% from a year ago. We expect computers in April and May to see large gains as a result of increased use during the ongoing pandemic.

AUSTRALIA/NEW ZEALAND:

Connected TVs and smartphones saw similar growth – percentage wise – in video views, but in terms of pure numbers, viewers watched three times as many assets on smartphones as on CTVs. BUT, at 13% of all video views, CTVs in ANZ make up the highest share for the device in any market, a sign that there’s big adoption of streaming on CTVs going on down under. By comparison, smartphones have a share of views just over 37%, up from a year ago (31%) but down a point from Q4. CTVs have seen share increase from 10% in Q1 2019 to 11% in Q4 and finally 13% this quarter. Completion rates on smartphones hovers around 38%, slightly above CTV’s 36%. Again, we’re seeing the devices on two different tracks. A year ago, completion rates on smartphones was at 45%; on connected TVs, it was just 31%. Look for it to cross over in the next two quarters as changing viewer habits accelerate due to stay-at-home orders.

Tablets in ANZ saw views increase 14% from a year ago, but they remain a fraction of plays on smartphones and computers and are even fewer than on CTVs, a unique distinction not duplicated in any other region. But content is completed 40% of the time on tablets, better than CTVs (36%) or smartphones (38%).

Computers have the highest completion rate in the region (49%) and have a 42% share, which has been declining. A year ago, it stood at 49%. Will it rebound? Not likely, as consumers already are turning to CTVs. Video views were up 20% Y/Y, a smaller gain than CTVs and smartphones, and just barely ahead of tablets.

ASIA PACIFIC:

Can you say smartphone? If not, you’re probably not playing in the Asia-Pac market, where the smartphone isn’t just the device of choice, it plays at being the only device. Video views on smartphones doubled Y/Y, although they fell off slightly from Q4. Video views on smartphones are 4X as prevalent as on the next closest device, computers.

Smartphones share of plays is just below 80%, down a point from Q4, but up from 66% a year ago. If smartphones were a song on Billboard, there would be a bullet next to their data (and, actually there is... the Asia-Pac market is one of a kind for smartphones).
Content views actually grew by single digits on computers (5%) and CTVs (4%) and declined 15% on tablets Y/Y. Share reflects a similar dominance with computers at 20%, tablets at 1%, and CTVs below 1%. Despite their dominance in terms of views, smartphones have the lowest completion rates of any device in the region at just 33% – a lower rate than any other region but Japan (31%). Computers have the highest completion rate (47%), followed by tablets (40%) and CTVs (36%).

**EUROPE:**
The other market with a 100% increase in smartphone content views Y/Y (along with Asia-Pac), which isn’t too surprising since Europe has the highest number of mobile assets among all seven regions, more than 2X any other. Views were down slightly from Q4, about 6%, likely due to a lack of sports content through most of March. Also not surprising: Mobile has a 59% share of video views, up from 47% a year ago and essentially flat Q/Q. Completion rates on smartphones are a respectable 41%.

**Computers** are the device used second most often to watch video. But for how long? A year ago, computers had a share of 43%; in the past 12 months, that share has dipped to 33%. Video views increased 21%, and on a head-to-head basis with smartphones, computers trail about 2:1 in terms of views. But, no other device has as high a completion rate… computers are at 58% and have held steady at that rate for the past year.

**JAPAN/KOREA:**
Video views on all devices faced strong headwinds in the Japan/Korea market in Q1. Computers were the lone highlight, of sorts, ending the quarter essentially unchanged from a year ago. Computers have 28% share of all video views, up from 21% in the past few quarters. Completion rates of 37% are the lowest in the world for the device, down sharply from Q4 when they were at 52%. Smartphone views were down 31% Y/Y, tablets were off 42% and connected TVs were down 4%. Of the three devices, smartphones have the largest share at 49%, followed by tablets at 13% and CTVs at 10%. Completion rates were 31% for smartphones, 38% for tablets, and 23% for CTVs.

**LATIN AMERICA:**
Connected TVs saw video views increase 143% in the quarter, rebounding from a slightly down Q4. Nevertheless, share for connected TVs remains below 1%, as adoption of the devices for streaming has been slow.

**Smartphone** video views increased by 34% Y/Y, reversing losses seen in Q4. Share bounced to 62%, as other devices struggled to attract views. Share was up from 57% in Q4 and just 49% a year ago. Like other emerging markets, LatAm should continue to see strong smartphone growth in the video space, especially as Apple’s latest iPhone comes to market. Smartphone video completion rates of 43% are the median for emerging markets and likely will increase as more premium content becomes available.

**Computers** hold the second-largest share of video views in LatAm at about 35%. But that share has been shrinking; a year ago it was 47% and just last quarter it was 39%. Look for that trend to continue. Completion rates are reasonably high for computers in the market at 57%, down just 2% from a year ago.

Aside from Asia-Pac, where **tablets** make up just 1% of the market, there isn’t another market with a smaller share or actual number of the devices.

LatAm has about one-third as many tablets in play as in Asia-Pac, and their 3% share declined 25% in the past year. Also declining? The number of video plays – down 25% in the quarter, it follows a 14% drop in Q4. Nonetheless, LatAm is tied with North America for the video completion rates on tablets at 50%, just off the 52% from a year ago. Go figure.

**MIDDLE EAST/NORTH AFRICA:**
Overall, MENA has rebounded well in terms of video views. After slipping 10% in Q4, it’s up 14% in Q1 from a year ago, with strong Y/Y and Q/Q increases in video views.

Leading the charge, of course, are **smartphones**, which saw a 47% increase in video views over a year ago. They now number 2X as many as desktop views. The jump in plays has helped smartphones muscle away additional share of the market. In Q1, 66% of all plays were on smartphones, up from 64% in Q4 and just 51% in Q1 2019. Completion rates on smartphones are the highest in the world at 46%. (North America is second at 44%.)

**Connected TVs** also saw strong growth in video views with an increase of 24%. But the number of views is so small as to make connected TVs a non-factor in terms of share. But, again, completion rates are good: 52%, just behind the world leader of 54% from North America.

**Tablets**, after gaining views and share in Q4, struggled to repeat in Q1. Views were down 9%, dropping share to 3% from 4% a quarter ago. The region had the second-lowest number of tablet plays in the world – and the lowest number of plays on connected TVs – pointing to a focus on smartphones and computers.
Q1 2020 CHANGE IN Y/Y REGIONAL DEVICE VIEWS & SHARE (ENTERTAINMENT)

Q1 2020 COMPLETION RATES BY DEVICE AND REGION (ENTERTAINMENT)
THE BOTTOM LINE

Tablets. Computers. Connected TVs. Smartphones. Which device is the device of the future for watching streaming video? Computers have long been the easiest device in developed markets to watch video on, and they’ve served well. But there isn’t a market in the world that hasn’t seen share of video plays decline on computers in the past couple of years, and especially in the past couple of quarters.

In mature markets, obviously, connected TVs have seen huge growth. In the U.S., connected TV users are projected to increase from an estimated 183 million in 2018 to 204 million by 2022, eMarketer says. But smartphones are ubiquitous. Mobile-centric streaming service Quibi, which launched in April, is just one example of a new generation of video services aimed specifically at mobile devices. With just 2.7 million downloads so far, it’s obviously not in the league of a Disney+, but there obviously is a place for it, even in a mega-mature market like the U.S. Its new plan to allow users to cast content to large screens is a good example of the flexibility streaming services have – and need to have – to unseat traditional content distributors.

Similar mobile-oriented services – like Viu from telco PCCW – are seeing strong growth in Asia-Pac, using a hybrid monetization model, unique content, and low barriers to consumer entry to spread quickly in the market.

Are smartphones the future hubs through which all content will be delivered? Is the missing link 5G wireless?

Again, a strong maybe.

While CTVs might have the brightest future in developed markets, smartphones are replacing tablets and computers in emerging markets like MENA, LatAm, and Asia-Pac.

How far will the trend go? Will it replicate in developed markets?

Yes.

Supplanting that big screen TV will be a lot tougher. We’re still seeing growth in smartphone plays in developed markets, however, while views on computers and tablets are standing still or, more often than not, declining. It’s happening, albeit at a slower pace.
ABOUT BRIGHTCOVE AND THE GLOBAL VIDEO INDEX

About [Brightcove Inc.](NASDAQ:BCOV)
We are the people behind the world’s leading video technology platform. With our award-winning technology and services, we help organizations in more than 70 countries meet business challenges and create strategic opportunities by inspiring, entertaining, and engaging their audiences through video.

Since Brightcove was established in 2004, we have consistently pushed boundaries to create a platform for people who are serious about video: one that is robust, scalable, and intuitive. Benefiting from a global infrastructure, unrivalled customer support, an extensive partner ecosystem, and relentless investment in R&D, Brightcove video sets the standard for professional grade video management, distribution, and monetization. To learn more, visit [www.brightcove.com](http://www.brightcove.com)

The Brightcove Global Video Index 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.