



May 2014

VIDEO CONTENT ROUNDUP

Internet users are spending more time than ever with digital video, and marketers have noticed. To help you stay on top of the latest trends in video content, eMarketer has curated a roundup of some of our latest coverage on the subject, including statistics, insights and interviews.

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VIDEO CONTENT ROUNDUP

Overview

Internet users are spending more time than ever with digital video—and more of that time than ever is mobile. According to eMarketer's latest estimates of time spent with media daily by the average US adult, digital video takes up nearly an hour. And mobile accounts for more than half that time, or 33 minutes, most of which is viewed on tablets.

eMarketer estimates daily time spent with digital video has risen from just 6 minutes in 2010 for the average US adult to 55 minutes this year. In 2010, the average consumer spent no time at all watching video on mobile devices.

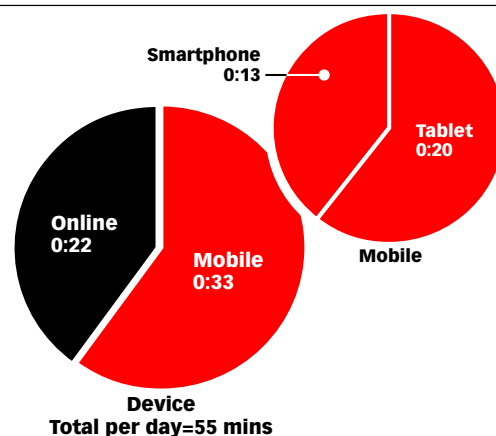
Research from Demand Metric and Ascend2, sponsored by Marketo, found that among large companies, video was the most common type of premium content produced for marketing purposes, far ahead of newsletters, white papers, webinars or case studies. Even smaller companies were more likely to produce videos than these types of content, though not as dramatically. The message is clear: Consumers are viewing large amounts of digital video, and marketers are responding, not just with ads but with content as well. What's more, large companies rated video the most effective form of content marketing, even though it was also the most difficult to implement.

And consumers tend to respond well. US internet users surveyed by Animoto in December 2013 said they perceived companies that produced digital video as more engaged with customers (77%). More than seven in 10 also said they had a generally positive impression of a brand, product or service after viewing digital video.

Overall, eMarketer estimates, 194.5 million people in the US will watch digital video at least monthly this year, or 41.4% of the overall US population. We estimate 104.2 million people will watch full-length movies via digital this year, while 141.8 million will watch full-length TV shows over the internet. By 2018, the US will boast 212.5 million digital video viewers, or nearly half the population overall.

Average Time Spent per Day with Digital Video by US Adults, by Device, 2014

hrs:mins



Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking online while on a mobile device is counted as 1 hour for online and 1 hour for mobile; excludes time spent watching via game console, connected TV or OTT device
Source: eMarketer, April 2014

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Premium Content Used by Enterprise* vs. SMB** Marketing Professionals Worldwide for Marketing Purposes, Jan 2014

% of respondents in each group

	Enterprise*	SMB**
Videos	72%	57%
E-newsletters	62%	56%
White papers	59%	54%
Webinars	54%	42%
Case studies	51%	54%
Research reports	41%	33%
Infographics	33%	35%
Product demos	32%	29%
Interactive apps	21%	10%
None of these	2%	6%

Note: n=521; *companies with 1,000+ employees (16% of respondents);

**companies with 10-1,000 employees (58% of respondents)

Source: Demand Metric, "Content Marketing in 2014: Benchmarks for Enterprise vs. SMB Organizations" in partnership with Ascend2 and sponsored by Marketo, March 12, 2014

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Tablets Challenge PCs as Leading Digital Video Channel in the US

Time spent with tablet video grows more than 50% over 2013, but video ad dollars stay online

The US market for tablet usage is maturing, and nearly half the population will use such a device at least monthly in 2014, according to new figures from eMarketer. In 2013, 132.2 million US consumers used a tablet, and that number is expected to grow 11.3% this year to reach 147.2 million. Growth rates will taper off into the low single digits over the next few years, reaching 171.3 million tablet users by 2018, or 52.1% of the population.

Tablets are taking on a more important role in advertising and ecommerce. Many US consumers are replacing their PCs with tablets for activities at home because of their portability (what makes them a “mobile device”), as they can be taken everywhere, always on. In addition, their screen size lends to specific use cases better than other mobile devices.

Tablet video viewing is one of these use cases, and its rapid growth speaks to tablets’ growing influence. In 2014, 113.4 million US tablet users will watch video programming on their devices at least monthly, representing 77.0% of all tablet users. That penetration rate will grow to 87.0% by 2018, according to eMarketer, totaling 149.0 million tablet video viewers, or 70.1% of all digital video viewers. By comparison, the number of video viewers on smartphones will reach 89.0 million in 2014 and is projected to grow to 125.4 million by 2018—a large number, but video viewer penetration among smartphone users won’t surpass 60%.

As a result of the increase in tablet video viewers, the time US adults spend watching video on tablets is growing faster than on any other medium, according to eMarketer estimates. Based on current trends, it’s inevitable that tablets will overtake online video—that is, on desktops and laptops—in the near future as the leading device for watching digital video.

US Smartphone & Tablet Video Viewer Metrics, 2012-2018

	2012	2013	2014	2015	2016	2017	2018
Smartphone video viewers (millions)	61.2	74.4	89.0	101.3	110.4	117.4	125.4
—% change	46.5%	21.6%	19.6%	13.8%	8.9%	6.4%	6.8%
—% of smartphone users	50.2%	51.5%	54.3%	55.5%	56.1%	56.0%	57.0%
—% of digital video viewers	35.7%	40.0%	45.8%	50.6%	53.8%	56.2%	59.0%
—% of internet users	25.8%	30.3%	35.4%	39.5%	42.3%	44.4%	46.8%
—% of population	19.5%	23.5%	27.9%	31.5%	34.1%	36.0%	38.1%
Tablet video viewers (millions)	56.6	92.6	113.4	126.0	134.0	141.5	149.0
—% change	208.0%	63.7%	22.5%	11.1%	6.4%	5.6%	5.3%
—% of tablet users	60.0%	70.0%	77.0%	81.0%	83.0%	85.0%	87.0%
—% of digital video viewers	33.0%	49.7%	58.3%	62.9%	65.4%	67.7%	70.1%
—% of internet users	23.8%	37.6%	45.1%	49.1%	51.4%	53.5%	55.6%
—% of population	18.0%	29.3%	35.5%	39.2%	41.4%	43.4%	45.3%

Note: smartphone video viewers are individuals of any age who watch video content via smartphone (browser or app) at least once per month; tablet video viewers are individuals of any age who watch video content via tablet (browser or app) at least once per month

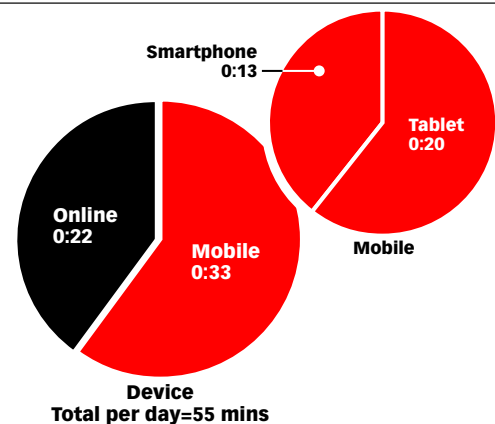
Source: eMarketer, March 2014

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Average Time Spent per Day with Digital Video by US Adults, by Device, 2014

hrs:mins



Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking online while on a mobile device is counted as 1 hour for online and 1 hour for mobile; excludes time spent watching via game console, connected TV or OTT device

Source: eMarketer, April 2014

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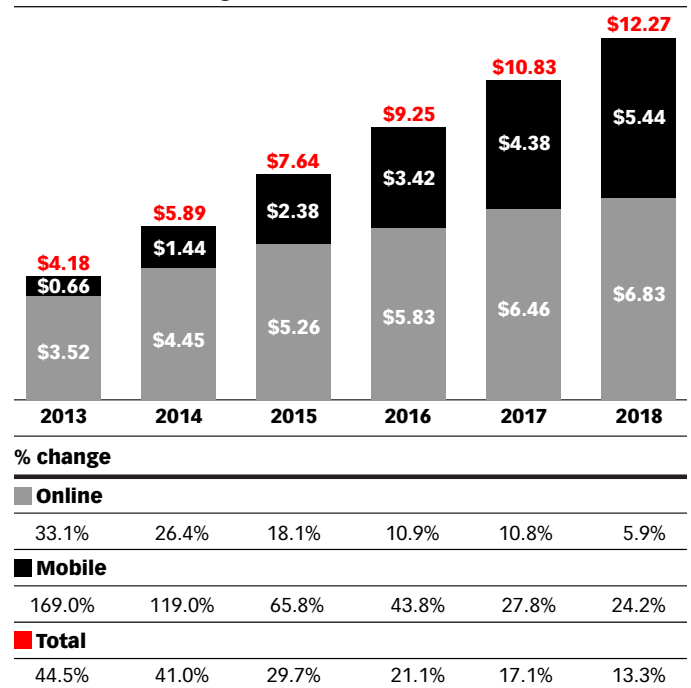
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Tablets Challenge PCs as Leading Digital Video Channel in the US (continued)

In 2014, time spent with video on tablets will increase nearly 54% to 20 minutes daily, from 13 minutes in 2013. Tablet video viewing is outpacing time spent with video on smartphones, gaining more share of overall mobile video time year over year. Time spent with video on smartphones will grow from 9 minutes in 2013 to 13 minutes this year. eMarketer expects US adults to spend 22 minutes watching online video on PCs in 2014—a figure that is flat year over year.

Despite the growth of mobile video viewing and the relative stagnation of video viewing on PCs, ad spending still skews heavily toward online video. According to eMarketer's most recent ad spending forecast, investments in online video ads in the US will reach \$4.45 billion this year, dwarfing mobile video ad spending, which will total \$1.44 billion. Throughout our forecast period, those numbers will grow closer together, and of the \$12.27 billion we expect to be spent on digital video in 2018, 55.7% will go toward online, despite the fact that time spent with mobile video is already 50% larger than time spent watching video online and is likely to continue increasing that gap.

US Digital Video Ad Spending, Mobile and Online, 2013-2018
billions and % change



Note: ad spending on tablets is included in mobile; ad spending on desktop and notebook computers included in online; numbers may not add up to total due to rounding

Source: eMarketer, March 2014

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Do Millennials Watch Online Videos Differently?

Younger viewers have less video ad recall than their older counterparts

Are millennials online video viewing habits substantially different than those of older viewers? Data from a November 2013 survey of online adults in the US conducted by YuMe and IPG Media Lab seems to indicate the answer is “yes.”

The survey found that millennials, defined in the survey as those ages 18 to 34, were more likely to watch digital videos in almost all content categories than their older counterparts. While 37% of millennials watched TV shows online frequently, only 26% of Generation Xers (those ages 35 to 54) and a mere 16% of baby boomers (those age 55 or older) did the same. The gap in watching user-generated content was also dramatic, coming in at 33% for millennials, 21% for Gen Xers and 15% for baby boomers. The only content category for which millennials did not lead other age demographics was online news.

Video apps emerged as a popular means of watching digital videos across all age demographics. But millennials used video apps on smartphones and tablets in slightly greater numbers than Gen Xers, and substantially higher numbers than baby boomers. Gen Xers were the most likely to stream video from a webpage on a tablet, while baby boomers used websites to watch videos on smartphones more than the other two age groups.

While using online video to target millennials seems to be a no-brainer at first glance, the study concluded that this group was also more likely to be distracted while watching content. In fact, 49% of millennials admitted to multitasking on a web-enabled device when watching videos on TVs, PCs, smartphones or tablets. That figure dropped to 36% for Gen Xers, and fell even further to 26% for baby boomers.

These distractions seem to result in digital video advertisements leaving less of an impact on millennials. The survey found that millennial video viewers recalled ads with less frequency than did Gen Xers, no matter what device was being used to watch content.

The gap was especially pronounced when viewers watched content on a PC.

Types of Video Content Frequently* Viewed by US Digital Video Viewers, by Generation, June 2013 % of respondents

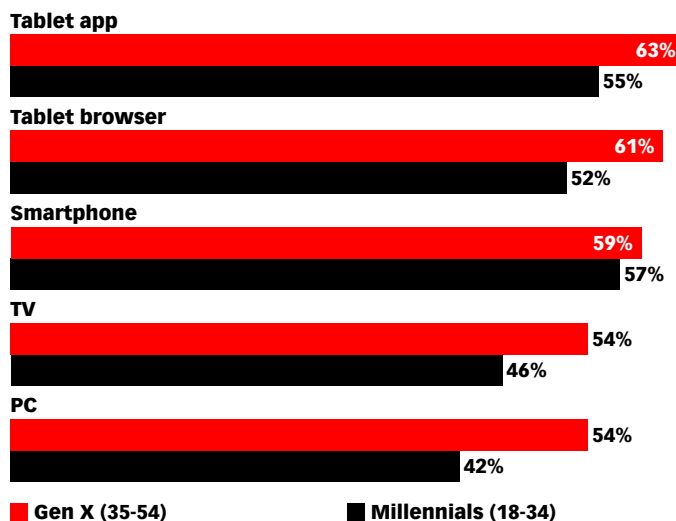
	Millennials (18-34)	Generation X (35-54)	Baby boomers (55+)
TV shows	37%	26%	16%
User-generated content	33%	21%	15%
Movies	28%	20%	14%
Music videos	19%	10%	5%
News	13%	21%	18%
Personal videos	11%	7%	6%
Web videos	10%	5%	2%

Note: viewed on a PC, smartphone, tablet or TV; *top-two box
Source: YuMe and IPG Media Lab, "Millennials and Digital Video," Nov 14, 2013

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Unaided Brand Recall* Among US Gen X vs. Millennial Digital Video Viewers, by Device, June 2013 % of respondents in each group



Note: *immediately following clip containing test/control ads
Source: YuMe and IPG Media Lab, "Millennials and Digital Video," Nov 14, 2013

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Long-Form Video Content Rivals Short, Even on Smartphones

Full-length movies, TV shows nearly as popular as snackable clips

The assumption that a small screen—like that of a smartphone—might be more typically used for viewing short, snackable video clips rather than long-form content seems simple. But research suggests full-length movies and TV shows come close to news clips and previews in popularity among smartphones video viewers.

According to research from Digitalsmiths, just over 42% of internet users in North America watched news video content on their smartphones, and more than 36% watched previews for TV shows or movies.

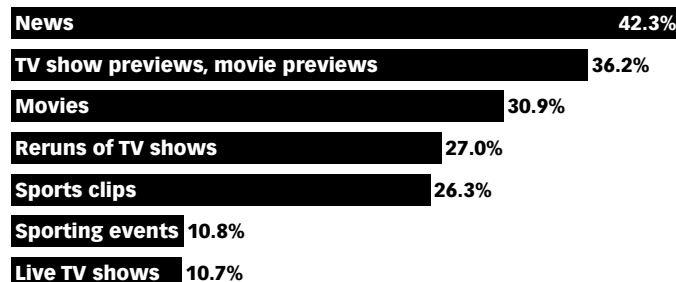
That compared with 30.9% of respondents who said they watched full-length movies on their phones, and 27% who watched TV show reruns.

Most respondents did not have any special subscription service to watch digital video content, but among those that did, Netflix was most popular, followed by Amazon Prime.

eMarketer estimates that in the US alone, 72.1 million smartphone users watched video on their devices at least monthly this year, a figure that will rise to 86.8 million by the end of 2014.

Digital Video Content Watched via Smartphone According to Internet Users in North America, Q3 2013

% of respondents



Source: Digitalsmiths, "Q3 2013 Video Discovery Trends Report: Consumer Behavior Across Pay-TV, VOD, OTT, Connected Devices and Next-Gen Features," Dec 4, 2013

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Digital Video Subscription Services Used* by Internet Users in North America, Q3 2013

% of respondents



Note: *monthly for movies or TV shows

Source: Digitalsmiths, "Q2 2013 Video Discovery Trends Report: Consumer Behavior Across Pay-TV, VOD, OTT Connected Devices and Next-Gen Features," Dec 4, 2013

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Smartphone, Tablet Users Take Video Outside the Home

Mobile video viewers more open to ad support

While connected TVs are decidedly the most popular way for US internet users to watch streaming TV shows and movies overall, various apps, websites and video services are also making it possible to untether TV from the living room entirely. Research conducted by Frank N. Magid Associates for Crackle suggests tablets and smartphones are more likely to be used for out-of-home viewing.

One-quarter of internet users reported using their smartphones to watch streaming TV and movies while on the go, and nearly as many said the same about tablets. Both devices were less likely to be used for this purpose at home.

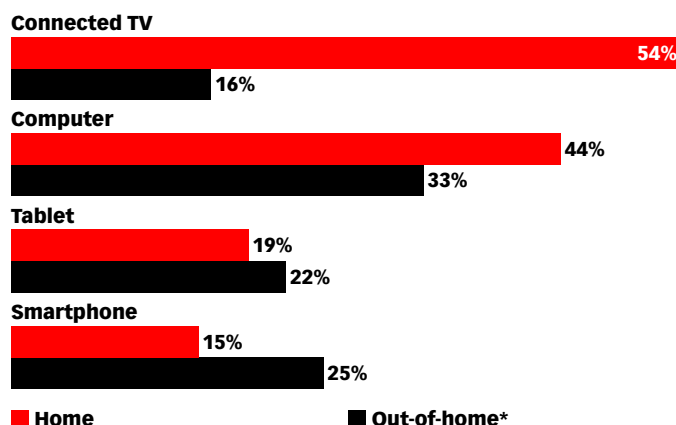
Mobile devices are also the video viewing channel where Magid found internet users least likely to be willing to pay for the service—but, at the same time, most likely to be open to ad support.

More than six in 10 respondents said they would prefer to watch TV or movies on their tablet or smartphone for free with commercials. This was the majority preference across devices, but connected TV viewers were more willing to pay subscription fees, and just half were interested in free, ad-supported programming.

eMarketer estimates that 91.4 US internet users viewed either streamed or downloaded movies at least monthly this year, while 120.7 million did the same with TV shows. With the bulk of these viewers more than open to watching ads, brands have a bigger opportunity than ever to reach them with video ads, still the fastest-growing format in the country.

US Internet Users Who Watch Streaming TV Shows/Movies at Home vs. Out-of-Home*, by Device, Sep 2013

% of respondents



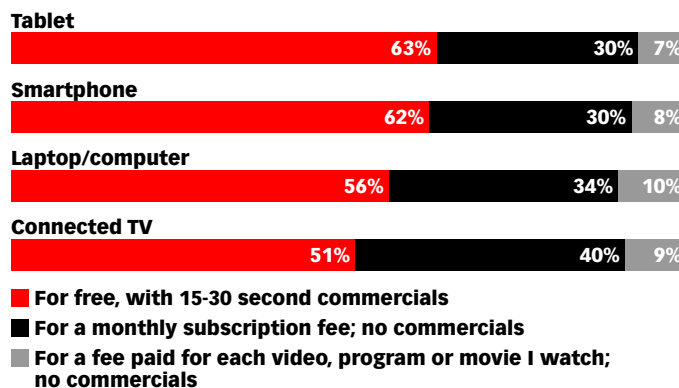
Note: n=1,200 ages 18-49; *via apps, websites or video services
Source: Crackle, "The New Living Room: Your Connected TV Guide" conducted by Frank N. Magid Associates, Nov 15, 2013

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US Internet Users Who Are Willing to Pay to Stream TV/Movies*, by Device, Sep 2013

% of respondents



Note: n=1,200 ages 18-49; *via apps, websites or video services
Source: Crackle, "The New Living Room: Your Connected TV Guide" conducted by Frank N. Magid Associates, Nov 15, 2013

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TV Watchers Want Original Content, No Matter the Platform

Netflix follows cable for highest percentage with subscriptions

The days of cable companies maintaining a stranglehold on content pipelines are a distant memory. Today, TV viewers have a wealth of options available to them, with some of the most appealing TV content coming through digital channels. But research shows that those who watch TV content place a premium on the ability to watch original programming.

In a June 2013 survey from PricewaterhouseCoopers, 63% of US internet users said that an offer of original content was at least somewhat important in influencing their decision to select a particular subscription service. And the importance of original content offerings was most pronounced among those ages 25 to 34.

Netflix, clearly realizing that studios and other content producers are moving into the digital distribution game, have fired back with their own attempts at content creation. And they've already met with success—the David Fincher-directed online show “House of Cards” recently won an Emmy, marking the first time an online video distributor snagged such an honor.

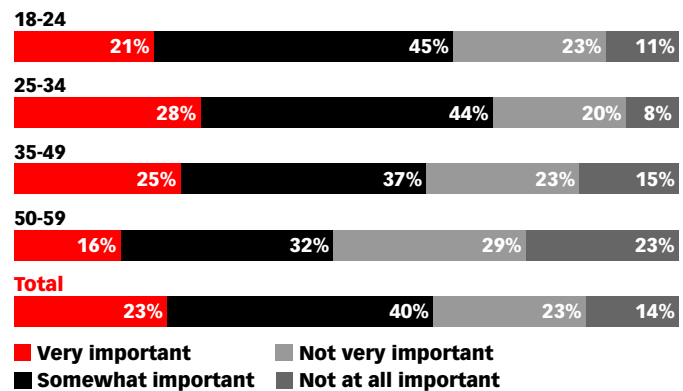
When it came to assessing the popularity of online sites hosting TV content, Netflix took top honors. More than six in 10 respondents said they relied on Netflix to watch shows. In comparison, just under half visited TV network sites, while just over one-third used Hulu, and almost three in 10 subscribed to Amazon Prime.

But when it came to pay TV packages that respondents subscribed to, cable TV still dominated. Seventy percent of respondents shelled out for cable TV, while only 41% splurged on Netflix. Amazon Prime was the next most popular digital channel users subscribed to, at 18%, followed by iTunes (16%) and Hulu (8%).

Cable was especially popular with those ages 18 to 24, with the data providing a counterargument to the idea that younger consumers are more willing to cut the cable cord.

Importance of Original Programming When Selecting a Video Subscription Service According to US Internet Users, by Age, June 2013

% of respondents



Note: ages 18-59

Source: PricewaterhouseCoopers (PwC), "Consumer Intelligence Series: Video Content Consumption," Sep 1, 2013

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Pay TV Services to Which US Internet Users Currently Subscribe, by Age, June 2013

% of respondents

	18-24	25-34	35-49	50-59	Total
Cable	77%	73%	64%	66%	70%
Netflix	56%	51%	37%	19%	41%
Satellite	20%	24%	33%	27%	26%
Amazon Prime	18%	26%	18%	8%	18%
iTunes	14%	18%	20%	10%	16%
Hulu	7%	10%	8%	5%	8%
Other	2%	1%	1%	6%	2%

Source: PricewaterhouseCoopers (PwC), "Consumer Intelligence Series: Video Content Consumption," Sep 2013

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B2B Perspective: Intel Defines ‘Must-Haves’ for Effective Video



Neda Stoll

Senior Marketing Manager

Intel

YouTube may be a powerhouse for consumer brand play, but business-to-business video offerings are gaining viewership, says Intel, which has been shifting more money into video. Neda Stoll, senior marketing manager at Intel, spoke to eMarketer's Danielle Drolet about attracting the B2B crowd effectively through online video.

eMarketer: eMarketer: What type of videos work best in the B2B space?

Neda Stoll: It's important to remember when you're looking at the B2B space, and a B2B audience, that they're human. At the end of the day, regardless of what kind of a video it is, it has to be interesting. It has to tell a good story, and have a catchy headline. This is extremely critical. When I say "catchy headline," I mean a headline that is going to say what is interesting about this video.

There isn't necessarily one type of video that works. Overall, it's important to be creating something interesting, engaging and that tells a good story.

eMarketer: What objective does video satisfy for the B2B market?

Stoll: Ultimately, we want the video to be a means to an end. As a brand, you never want to have people watch a video and then have that be the end of it. We want to engage our audience with video and then have a call to action that invites somebody to go to Intel.com for more information.

"There isn't necessarily one type of video that works. Overall, it's important to be creating something interesting, engaging and that tells a good story."

For example, if it's about a specific product that they're interested in, we want to refer them to a place where they can get more information, such as reviews, more options and prices. It depends on the objective or the content in the video, but certainly it's a starting point. The video is the icebreaker with your audience. Then there are actions that you want them to take based on that video.

eMarketer: What are the three most important best practices to follow to cause a video to get views?

Stoll: The video should be educational about a theme, topic or product. An example of a theme could be if Intel talked about the benefits of private cloud versus public cloud, or what does Big Data mean for a company.

Secondly, it's got to solve a problem, especially if it's product-focused. You need to think about what value you're bringing to your audience, and what are they going to get out of your video.

Last, make it just fun and engaging. Tell an interesting story. Ask yourself, will people want to share it with friends and colleagues in their social network? I would not emphasize being too "sales-y." That gets brands in trouble. Don't push the product too much in the video.

eMarketer: How important is length? And what are some best practices for timing?

Stoll: It depends. For example, if an audience is consuming content on a mobile device, we often find that it has to be snackable. These are people who are on the go—on a train, at an airport or waiting somewhere. Most B2B audiences will not engage with a piece of content or a video on their mobile device if it's 10 minutes long. We find that when it comes to small screens, we have to keep everything ideally between 30 seconds and two minutes.

"Most B2B audiences will not engage with a piece of content or a video on their mobile device if it's 10 minutes long."

Desktop is a bit different. Length does matter in most B2B Perspective: Intel Defines 'Must-Haves' for Effective Video cases, because if you can get your message across in an effective way in 30 seconds, then you don't need a 25-minute video. However, what we've seen at Intel is that if we have a really good storyline and the video is extremely engaging and educational, users will stay on and watch a 10-minute video. So quality is first, length is second.

eMarketer: What are some of the gaffes that you see people make in their B2B marketing videos?

Stoll: The No. 1 mistake that I've seen made—and we've certainly made it at Intel—is making videos too commercial and "sales-y." For example, take the Ultrabook, it's thin and light. Everybody says that in the marketplace. That's not new or exciting. Essentially, you're not differentiating the product versus our other products or competitors. It's not saying anything that the audience doesn't already know.

There's also too much emphasis on pushing and selling a product, which is a turnoff to your audience. You can't do a hard sell when you're engaging through video. We've made that mistake with some of our Ultrabook videos. People won't get through 10 seconds of the video if right off the bat it's not what they were looking and hoping for.

Success with Video Content Means Pushing Boundaries



Steve Baer

Managing Partner, Director of Brand Design Group

Code and Theory

Interactive agency Code and Theory has found video content to work effectively in various stages of the marketing funnel, whether it's discovery, education or purchase for its clients, including Dr Pepper Snapple Group and Maybelline New York. Steve Baer, managing partner and director of Code and Theory's brand design group, spoke with eMarketer's Danielle Drolet about how brands can successfully integrate video content into digital campaigns.

Marketer: What should brands be thinking about first when planning a video content marketing strategy?

Steve Baer: Figure out who you're talking to, and then what you need to tell them to move them along the funnel. First, we want to know what story the brand is trying to tell. If you don't have a story to tell, you've got to figure one out.

There are cases now that you have many stories to tell. This is a departure from how a lot of brand marketing has been done, where many advertising campaigns went with more singular messaging. With content, you might have lots of truth as a brand, and therefore many stories to tell. The key is to figure out which of those story streams will yield the most interesting content and will build best alongside the objectives you set.

eMarketer: What's most difficult for brand marketers?

"Pushing the boundaries of the brand's tone and personality is what's keeping brand marketers up at night."

Baer: Clients know they need to become serious about content marketing. The best examples of video content marketing tend to be the ones that are edgy and push the boundaries. And the lesson that you could take away from that is the only way to do content marketing and succeed—with video in particular—is to do things that might get me in trouble on the client side. Pushing the boundaries of the brand's tone and personality is what's keeping brand marketers up at night. They are thinking that if they don't do something risky, it won't succeed.

eMarketer: Is "viralness" still important?

Baer: Many clients are starting to realize that viral in large part is a myth or has become one. Building something, sending it out there, and getting the views and impressions to move a needle for a brand is quite difficult to do without getting some paid media behind it.

There's a pay-to-earn ratio that needs to be considered, and many people, especially in the marketing world, think something went viral—it was amazing and went viral on its own. They don't realize there's been some propulsion behind it from a media spending perspective that has gotten it to a certain place, and then it took off from there.

eMarketer: How long are the best videos?

Baer: The best video length is between 2 and 5 minutes. We typically make them less than 3 minutes. However, if it's a great piece of content it will play, even if it's a long piece of content, such as 5-minute minifilm.

It's also great to create a toolbox of formats against a story line. We like to look at a piece of content, but against a story. One story line might be expressed through three, four or five different formats. One of them is the long video. Another is a short cut-down of the video. Then, there could be an Instagram video aspect or Vine aspect. In addition, an animated GIF. We like to get efficiencies and create many different formats of a single story line because, quite frankly, sometimes the really lightweight stuff performs really, really well. It's got to be parsed across different formats.

Success with Video Content Means Pushing Boundaries (continued)

eMarketer: What channels do you use to distribute your video content? Is YouTube really the biggest channel out there right now?

Baer: If you're a marketer, putting it out in as many places where it can live isn't necessarily a bad thing. If you have a huge Facebook following, push it out there. YouTube is also a very obvious place. Most of the world searches for video happening there. You should be there, too. VEVO is another that's been popping up on people's radars lately because of Robin Thicke's "Blurred Lines" music video. VEVO has done some risqué videos that are exclusive and a little bit off the chart. It's been successful in creating a separate community.

Distribution can sit on lots of platforms. But where it gets interesting is how you're pushing the message out, how it exists and drives people to those places.

"VEVO has done some risqué videos that are exclusive and a little bit off the chart. It's been successful in creating a separate community."

eMarketer: Is the brand site just as important?

Baer: It is. It can depend on the category, too. There are always arguments as to how much upkeep is needed on a brand site. But with brands I've worked on, there's always been some organic traffic to their sites, even the ones you wouldn't expect. There's an argument to be made that if you have content it should live in all the channels, certainly your own channels. By that, I also mean your social channels that you have access to and control. The website is just another touchpoint for it.

In addition, the brand site can be the perfect place for content when it comes to where in the funnel or where in that circle you need to hit people. For example, if you're a beauty brand or a home improvement retailer, people may be looking for information on how to use your products. Consumers may go to Google or YouTube, but there's a big chance they'll go to the brand site. From an education standpoint, it makes sense to be there.

eMarketer: How would you like to see video content marketing evolve over the next two years?

Baer: I want to see it reprioritized within the marketing mix. It's relatively new, so we'll see clients prioritizing advertising and some of the other expected marketing tactics ahead of the content piece. This is why you see a lot of repurposed advertising happening.

I'd also like to see closer integration between paid, owned and earned media. At the moment, there's media buying and planning typically happening at a media agency, and then content creation across a slew of agencies or the client itself. I think using the two in tandem is the secret. We need to be asking how to distribute it in an organic way, as well as how to boost it with paid media. How can we use the two in close orchestration? Right now, there's a lot of separation there.

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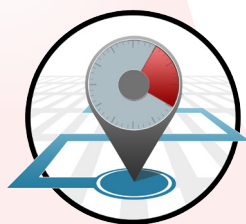
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