

# EVOLUTION OF DIGITAL VIDEO CONSUMPTION PATTERNS

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## ABSTRACT:

In today's markets, companies have greatly shifted their focus towards customers as the entities creating the demand for companies' products and sources of the revenues. The consumers shape and influence the current market trends with their desires and preferences; this requires reassessing and reshaping the offers and communications from companies. Most successful offer adjustments are built on relevant research and formed by consumer insights, often based on patterns of content consumption. The main aim of this article is to identify digital video marketing trends by combining two essential pillars: the data management possibilities related to the digital environment and the evolution of media consumption habits of consumers. The authors examine secondary data which is precisely selected, collected and shaped according to the research design requirements from available Consumer Barometer Research provided and processed by *Google*. Identification of the six most significant digital video trends to shape digital marketing in the following years can be considered the core of the authors' research. The results are centred on innovation progress and consumers' consumption habits and aim to outline possible approaches to digital video production and delivery to target groups for several future years.

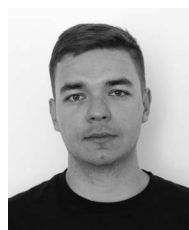
## KEY WORDS:

consumer behaviour, data mining, digital marketing, digital video, trend prediction

## 1 Introduction

When television entered markets as a mainstream product, it caught the attention of the masses very quickly; TV is nowadays at the centre of almost every living room. The primary and only format broadcast via TV is video and its variations. Huge amounts of people almost addicted to television and its streaming – from the marketers' point of view, concentrated in one place – make television the perfect channel for companies to communicate and deliver messages at the right time and to the right place. Television was, still is, and will for a long time be a mass audience medium, according to Draganska, Hartmann and Stanglein, wherein advertising is primarily aimed at influencing the mindset of a customer who may purchase at any time within a reasonably long horizon.<sup>1</sup> However, new media outlets have created a multitasking way of life. Consumers' attention is divided between several media types and the digital environment is 'stealing' an increasing number of people from television to mobile and desktop devices connected to the Internet.

<sup>1</sup> DRAGANSKA, M., HARTMANN, W. R., STANGLEIN, G.: Internet Versus Television Advertising: A Brand-Building Comparison. In *Journal of Marketing Research*, 2014, Vol. 51, No. 5, p. 578.



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The characteristics and qualities of the digital video format make it perfect for the digital environment, which offers a wider range of targeting options, broad reporting possibilities, and many more advantages in comparison with TV. There are several research studies reflecting on the digital video format that have been published over the past few years. Their purposes are to examine the impacts, positive and negative effects of video formats and to determine the potential of video in the digital environment. For instance, Brechman et al. acknowledge digital video as a trending, rapidly growing format offering new opportunities.<sup>2</sup> Under empirical research, the researchers generally understand the testing of the ad recall of pre-roll and mid-roll spots and their impact on consumers. Many studies have applied digital video formats into a particular area. For example, Malaga and Kopeclare have been testing variations of video formats in terms of their application to education and teaching processes.<sup>3</sup> These and other research articles confirm that the video format is trending and has a wide scale of use. However, none of the mentioned articles look further. This fact has shaped the space for the research presented in this article which has the potential of enriching the existing approaches to the video format and prepare marketers for future development and emerging possibilities.

As we have mentioned above, the main objective of this article is to identify digital video marketing trends by combining two essential pillars: the digital environment data management possibilities and the evolution of media consumption habits of consumers. Three partial goals have been set to support the achievement of the main objective:

1. To define the position and role of video in the digital advertising environment.
2. To determine the optimal video advertising format based on consumer behaviour and preferences.
3. To identify the most significant digital video trends to shape digital marketing in the years 2017-2019.

The efforts of all companies are based on available market possibilities and consumers' desires. Therefore, following trends and early adoption of new approaches might be the crucial factors in gaining a competitive advantage in the overcrowded market.

## 2 Methodology

Our research is based on two pillars which allow us to identify and present the current and future trends in digital marketing strategies: data mining and consumers' insights. Video is a trending format and both pillars are essential phenomena for effective video communication in digital marketing. The research began with an overview of the available theoretical sources, as noted in the introduction, which revealed the video format's history and its application in the digital environment. Online sources contributed to identification of the video format's position in the mix of other digital media formats and proved its vast diversity and data-based potential.

The video format in the digital age has a compelling potential to utilize data generated by viewers, which is its biggest advantage. This sorted and interpreted data was completed by processing the secondary data on consumer insights collected from research questionnaires in the Connected Consumer survey provided by Google Consumer Barometer. The whole research process was enriched by informal collaboration with an external RTB specialist marketer who consulted, mentored and complemented all the investigated information.

## 3 Video in the Digital Environment

As Scott states in *New Rules of Marketing and PR*, video and audio clips were a part of websites from the very beginning of the Internet. However, they were used very occasionally due to difficulties in categorisation

<sup>2</sup> BRECHMAN, J. et al.: Limited-Interruption Advertising in Digital-Video Content. In *Journal of Advertising Research*, 2016, Vol. 56, No. 3, p. 290.

<sup>3</sup> MALAGA, R. A., KOPPEL, N. B.: A Comparison of Video Formats for Online Teaching. In *Contemporary Issues in Education Research*, 2017, Vol. 10, No. 1, p. 7.

and searchability.<sup>4</sup> Video advertising formats in the digital environment are very flexible and adaptable to the dynamic character of websites and their disposable inventory. A brief overview of available video and video ad formats shows that their selection depends on the platform where the format is published and on the possibilities which a particular platform offers.

### 3.1 Formats

Global IAB divides the video formats into in-display video ads and digital video in-stream ads.

#### In-display video ads

IAB's document titled *Digital Video In-Stream Ad Format Guidelines* published in 2016 characterises in-display video ads as video served outside any video content or video streaming content. Therefore, these are most common formats:

- video in standard banner;
- video on page;
- video in rich media;
- incentivised video;
- video in feed (mostly the domain of social networks).<sup>5</sup>

In-display video ads use standard or rich media formats in two particular ways:

- as a vehicle: video is adjusted to banner size (for example, in 300x300 pixels) while banner displays video format instead of static pictures;
- to replace banner placement: banner placement is adjusted for video, and video ad is shown (in default video format size) instead of banner;
- in-display video ads do not interrupt video content which the user is currently watching and are shown independently of video content on specific websites.

#### Digital video in-stream ads

Video ad formats are launched and displayed in video player while the user is watching video content. In-stream ads interrupt video and are mostly used in TV archives, on local websites, and in programmatic. The most common in-stream video ad formats are ad spots during video content. These video ad formats have similar principles to those on television:

- pre-roll spot: launched before the video content is played;
- mid-roll spot: launched while a user is watching the video content. There could be an unlimited number of mid-roll spots in the video content;
- post-roll spot: launched after the video content has finished.

Some of these in-stream video ad formats are skippable (skip form differs depending on supplier's preference). Most common are skips after five, ten or even twenty seconds.

### 3.2 Video ad format: Suppliers' overview

These are the three most common ways to purchase video as an advertising format on the Internet:

1. **local suppliers** – local websites and portals own and produce their own video content and create a video portfolio which has a regular or an occasional audience. Advertising formats are purchased on the basis of

<sup>4</sup> SCOTT, D.: *New Rules of Marketing & PR*. Bratislava: Eastone Books, 2010, p. 72.

<sup>5</sup> IAB TEAM: *Digital Video in Stream Ad Format Guidelines*. Released on 8<sup>th</sup> January 2016. [online]. [2016-12-22]. Available at: <[http://www.iab.com/wp-content/uploads/2016/01/DVAFG\\_2015-01-08.pdf](http://www.iab.com/wp-content/uploads/2016/01/DVAFG_2015-01-08.pdf)>.

regularly negotiating relationships between employees (traders on both sides: advertiser and supplier);

**2. social networks** – global social networks such as *Facebook*, *YouTube*, *Instagram*, *Snapchat*, etc. allow companies and individuals to upload video content on their social network profiles and, via unpaid and paid channels, spread it to precisely targeted audiences;

**3. programmatic buy (and RTB)** – programmatic automated auction systems are a substitute for negotiating processes and allow the purchase of video ad formats directly via software. Internal document named *Video Ad Possibilities on the Slovak Market* created by the Slovak media agency *Starmedia Co.* highlights that not so long ago it was possible to purchase banner positions only; nowadays it is possible to purchase a wide range of video ad formats.<sup>6</sup>

Every purchase form allows the purchase of both in-display and in-stream ads. Which form is preferred depends on individual rules and intentions.

## 4 Data Collection as Consumer Behaviour Indicator

Data mining represents the future of digital marketing. Every communication with consumers generates an enormous amount of data eligible for use in future campaigns. Exponential technology expansion, i.e. the new technologies seamlessly spreading all over the world are creating opportunities to gain competitive advantage by applying new data-based approaches to marketing communication. According to Rud, it is nowadays possible to generate various types of data based on demographics, behavioural patterns and psychological or attitudinal approaches. This data is available from internal databases, transactional databases, historical databases, or from external sources.<sup>7</sup> While standard banners and rich media formats report (in rough data) clicks, impressions, dwell rates or viewability, video formats are able to disclose much more about the consumers reached. Different video ad format suppliers are capable of reporting different data. Our brief overview below describes data available to mine from video formats regardless of supplier.

### Video as ad format

- Impressions: number of times video was viewed;
- Clicks: number of clicks on video format;
- Unique cookies: number of unique cookies video ad reached;
- Real users: number of real user video hits.

### Video consumption

- Three-second video views: the number of users who saw at least three seconds of video format;
- Ten-second video views: the number of users who saw at least ten seconds of video format;
- Video percentage watched: the average percentage of the video the user watched;
- Video watched at 25/50/75/95/100%: the number of times the video was watched for the declared length.

### Video engagement (primary matter of social networks)

- Video likes, shares, etc.: the number of times video has social network interaction;
- Video mouse-over: the number of times/time spent on 'mouse-overing' the video format.<sup>8</sup>

6 STARMEDIA INTELLIGENCE: *Video Ad Possibilities on the Slovak Market*. [Internal document]. Bratislava : Starmedia Co., Ltd, 2016.

7 RUD, O.: *Data Mining*. Brno : Computer Press, 2001, p. 22.

8 Video data report possibilities processed in accordance with *Facebook*'s and *YouTube*'s internal bidding systems complemented by local suppliers' capabilities (authors' own research, 2016).

This brief overview does not contain all data mining possibilities that video formats are able to offer. It should be underlined that all generated datasets are applicable in future campaigns. By means of data storing and processing software, it is, for example, possible to target and display video ad format only to consumers who saw the previous video for at least 50% of the total video length. Advertisers might also retarget consumers only with the part of the video which has not yet been seen. More importantly, knowledge is pointing to data mining across various devices: *Google* and *Facebook* recently released tracking technologies which are able to follow users through desktops, mobiles or tablet devices. It is only a matter of time before television will complement the three aforementioned devices in cross-platform tracking.

## 5 Digital Video Consumption Patterns

The third objective of the research has been proposed on the basis of the Consumer Barometer tool developed and operated by *Google*. Consumer Barometer collects and processes consumer behaviour data on the basis of questionnaires and helps us understand users' behaviour in the digital environment. Video-related data is described below. The selected questions had an average of 1,659 respondents and research was carried out in 2015.

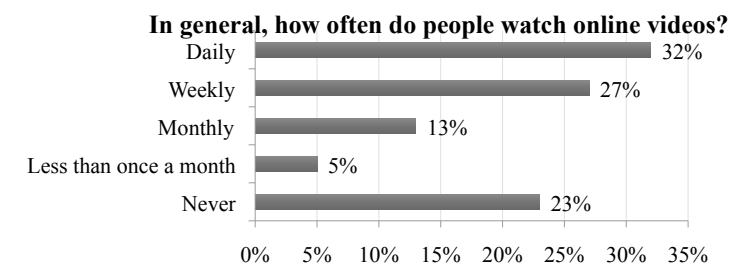


Figure 1: "Please think about your usage habits during the last month. I'm going to read you some activities that you may do for personal reasons on your [smartphone / tablet / PC or laptop]. How often do you...?"

Source: Consumer Barometer by Google

As per Figure 1, almost 60% of consumers asked watch the video format on some of the available online platforms at least once a week. Only 23% declare that they never watch video online (mostly the older segment of the population without digital habits and competences). In Figure 2, the types of sites via which online videos are accessed commonly are discussed.

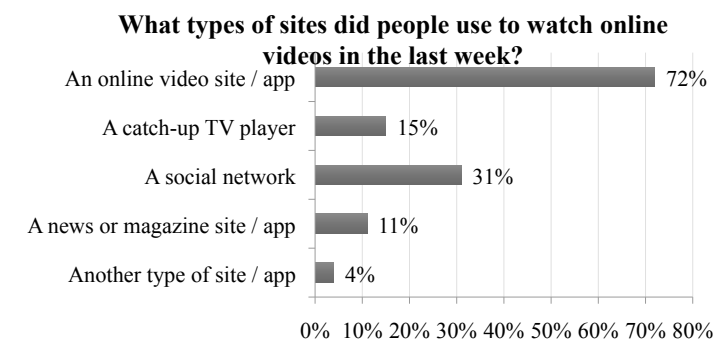


Figure 2: "Did you watch online video(s) via any of the following websites or apps in the past 7 days?"

Source: Consumer Barometer by Google

Specialised video websites and applications and social networks are the leading platforms for video consumption and the market predicts a continuous trend for these channels. The reason for this is that websites and social networks create favourable conditions for video formats. Reasons for watching online videos are visualised in Figure 3. Nine reasons common for most consumers were identified and statistically assessed while only 4% of the motivational factors are included in the last “Other” category.

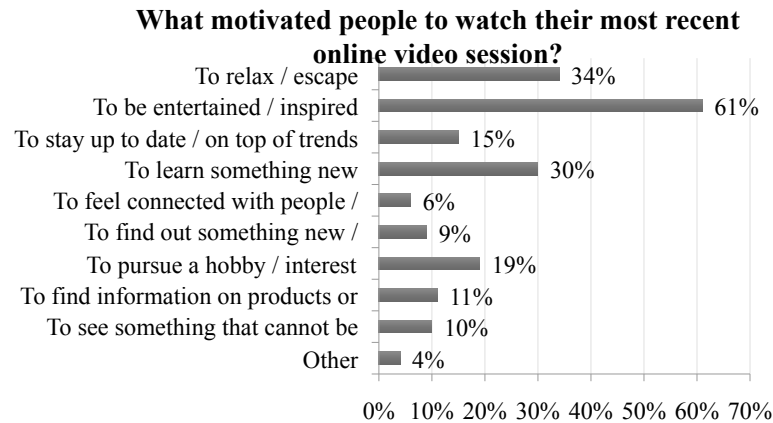


Figure 3: “Why did you watch online video(s)?”  
Source: Consumer Barometer by Google

Consumers watch videos mainly for education in various forms or for entertainment purposes. The main intention is to combine relaxation with a light form of education in free time.

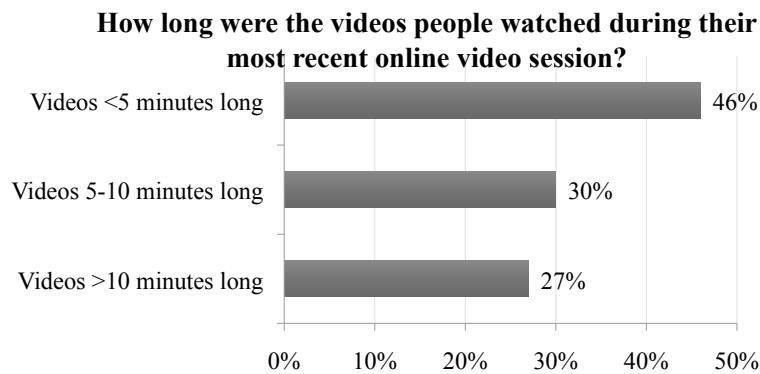


Figure 4: “How long were the video(s) you watched?”  
Source: Consumer Barometer by Google

According to data presented in Figure 4, in comparison with TV consumption, consumers prefer a shorter length of video while consuming in the digital environment. As they get used to portable devices, this time lengths. The answers presented in Figure 5 show how focused were people when watching their last video session.

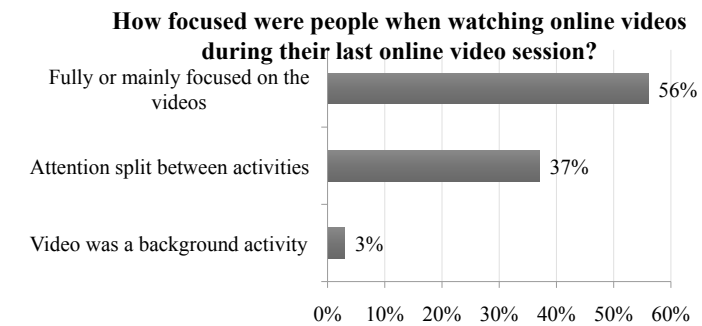


Figure 5: “And how would you best describe the attention you gave to the video(s)?”  
Source: Consumer Barometer by Google

In Figure 6, the source of activity parallel to watching online video is discussed.

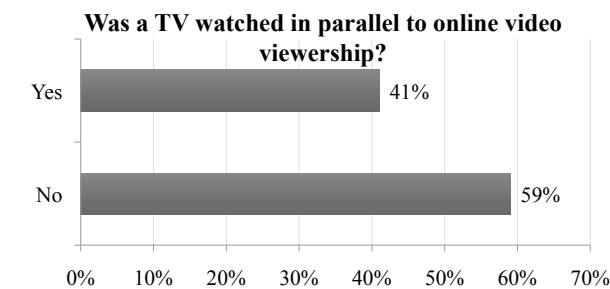


Figure 6: “Were any of the following devices also being used by you or in the background while you were watching these video(s) the last time?”  
Source: Consumer Barometer by Google

Almost a half of users regularly watch online video while watching television. There are many more activities consumers can carry out while watching television that support statements on TV use as a ‘background noise’, the most significant of which are devices such as smartphones, which are used parallel to TV watching. Whereas the TV as a medium offers the most suitable environment for horizontal video formats, simultaneously used smartphones are oriented vertically, which enhances vertically-oriented content consumption.

The selected data is used to analyse digital video consumption and focus on changes in video consumption habits. The secondary research on the collected responses confirms that the flexibility and dynamism of digital video formats ensure increased interest and attract consumers who are shifting from ‘pre-served’ TV video content to on-demand digital video platforms. The analysed data shows that consumption of video content is daily, and users consume video content mostly with the intention of entertainment or education. The shorter videos are preferred due to the users’ desire to absorb a huge amount of information in a relatively short time spent online. The digital video format is in most cases not the only platform consumed at the time.

All this know-how, supplemented by the data-based knowledge available from video, allows us to determine the right format with the right delivery method to the right consumer. If the video supplier ascertains that a user watched only 50% of the served video, he is able to serve only the remaining 50% to complete the story the consumer was not able to gain at the first attempt. The length of the consumed part of the video also indicates interest in receiving similar videos with similar stories and creativity. Changing media consumption habits are disposed towards the digital environment and video especially offers a huge area to enhance the performance of marketing communication. For advertisers using digital video the largest and most easy to use space are in-stream ads, which interrupt the currently watched video content. However, this type of video advertising might be considered as intrusive and might provoke the exact opposite effect to that intended by the supplier when displaying the advertisement.

The figures above illustrate the digital video consumption habits so advertisers should adapt to consumers' preferences and produce and serve entertaining videos, preferably on a daily basis, with added value for consumers, complementing stories from television. However, this know-how can be applied in many different video formats. The last part of our study identifies the most trending formats containing the factors mentioned above.

## 6 Six Video Trends Shaping the Digital Market

The trend of digital video began in European markets around 2012 and is still 'trending'. Some of the digital marketing trends are actually one or two years old; however, the video trend as such is still evolving and is creating its own subcategories. Due to consumers' behaviour and video consumption, there is a prediction for continual evolution of digital video and its commercial uses. On the basis of collected information and data from the third, fourth and fifth chapter, we are able to predict the following trends in applying video formats in the digital environment.

The research results are supported by discussions with renowned digital marketing practitioners, participation on several research projects dealing with digital marketing-related research questions and continual observation of the digital trends in question. It can be expected that the declared digital video trends will remain valid at least until the end of year 2019. Due to dynamism of digital technologies and the evolution of marketing approaches, small updates might be needed before the end of the aforementioned period.

**1. Split message between several devices.** The research above shows that users' attention while watching TV is split between several activities and 41% of television content's consumers are watching online videos in parallel. However, online video is not the only activity users are focused on while consuming TV content. Smartphones, tablets and portable computers allow users to divide their attention between more devices and use TV only as a background noise. The multiscreen phenomenon creates space for multi-channel communication strategies aimed towards the final consumer. Nowadays it is possible to outline a story in a TV video commercial and deliver the rest of the story via the digital environment. Attention is more stimulated and ad message delivery diversified between more devices. Additionally, users are seamlessly switching from online to offline and back again, which will encourage significant effort to be able to track consumers' 'media journey' to be present, more accurate and occurring in real time.

**2. Small screen addiction.** According to research by Nielsen, the mobile phone became the third biggest platform for video in 2016, gaining 27 minutes' watching per day, and this time is still growing.<sup>9</sup> Ooyala's Global Video Index report also outlined increased mobile consumption in a statement that since 2013, video views have grown more than 233% and users are now consuming even longer videos via their mobile or tablet device. Previous research by Roettgers declares that 48% of all video viewing on smartphones is now related to clips that are five minutes or longer: a year ago, that number was still at 23%. In all, 30% of viewing is of videos that last 20 minutes or longer.<sup>10</sup>

**3. Laziness to 'flip over'.** Standard digital video format has horizontal orientation (to be accurate, the aspect ratio is 16:9). However, mobile displays are vertical and consumption of vertical aspect ratio videos is more comfortable. The study by Griffiths found out that vertical mobile video views are six times higher than the interaction rate of horizontal mobile video, so we should expect to see more brands and publishers shifting to a vertical-focused experience on mobiles.<sup>11</sup> This trend is supported by Figures 4 and 6 in the Chapter 5 of this article, where the most significant of the declared statistics is the increasing media consumption on smartphones.

9 NIELSEN COMPANY: *Internal Report of Nielsen (the company specialising in consumer research), 2016*. [online]. [2017-06-12]. Available at: Paid access via the company's interface.

10 ROETTGER, J.: *More Than Half of All Video Viewing Now on Mobile, Tablet Viewing Flat (Report)*. Released on 6<sup>th</sup> December 2016. [online]. [2016-12-27]. Available at: <<http://variety.com/2016/digital/news/mobile-video-viewing-stats-1201934907/>>.

11 GRIFFITHS, A.: *Unruly's Video Advertising Prediction for 2017*. Released on 22<sup>nd</sup> December 2016. [online]. [2016-12-28]. Available at: <<https://unruly.co/blog/article/2016/12/22/video-advertising-predictions-2017/>>.

**4. Possibility of looking 'behind the corner'.** New technologies and recording possibilities allow the production of interactive 360-degree videos thanks to which the consumer is able to look around by tapping the display on her/his phone or by using the mouse on a computer. Rowntree's article mentions Hillier's declaration that 2016 was a breakthrough year for 360-degree video content; 2017 could be the year it becomes ubiquitous. However, we are still missing more landmark examples of the format in action to take it past the tipping point, a gap that adventurous brands will surely be trying to fill in the year ahead. Brands that create more immersive video content could benefit from the introduction of 'repeat view' metrics, as users absorb video content multiple times to see each part of a story.<sup>12</sup> 360-degree videos have the capability to be used as in-stream and in-display ads, with the potential to capture users' attention more effectively due to format interaction possibilities and human curiosity.

**5. Modern role models.** As Wen et al. state, in recent years, vlogging has gained much attention worldwide, especially with Google's acquisition of *YouTube* in November 2006 for \$1.65 billion. YouTube is a popular vlog site that lets users upload, tag and share video clips, thereby making them known to the world. Since a video can show a lot more than a text, vlogs provide vloggers with a much more expressive medium to communicate with the outside world than text blogs.<sup>13</sup> The most popular vloggers have thousands of subscribers and millions of video views. Vlogs express actors' opinions, thoughts and attitudes which are stated by the spoken word, occasionally accompanied by special video effects, pictures or text boxes. Vlogs are video-on-demand platforms catching precisely defined target audiences; vloggers are often opinion leaders and trendsetters who create appropriate channels for brand communication.

**6. Video consumption as a marathon.** This is a relatively new phenomenon wherein people are watching more episodes of their preferred TV or online show consecutively without any break. According to recently released GfK MRI research brought together by Stanton, binge-viewing is more than mainstream; it is prevalent, with almost six out of ten (57%) TV viewers saying they have regularly watched three or more episodes of the same show in one sitting, whether via streaming, DVR, VOD or TV marathons. According to Wen, regular binge-viewing includes the three categories as follows:

- usually – binge all or most of the time: 14%;
- frequently – binge more than half the time: 18%;
- sometimes – binge about half the time: 25%.<sup>14</sup>

As stated in Arlen's publication *TV Binge-Viewing: Primarily a Solo Act* from 2015, binge-viewing is primarily a solo act, with 60% of binge-viewers watching shows alone, 43% with a partner, and only 19% with friends.<sup>15</sup> The binge-viewing trend is influencing today's media culture,<sup>16</sup> creating new consumer behaviour models and changing the media consumption habits users had before the entrance of video-on-demand platforms.

## 7 Conclusion

Initially, the video format seemed to be the domain only of television due to its familiar character and its ability to reach a huge number of consumers. However, consumers' gradual shift towards the digital environment and increasing consumption of the Internet content have pointed to digital platforms as suitable channels

12 ROWNTREE, L.: *Expert Views on What Will Become of Video Advertising in 2017*. Released on 22<sup>nd</sup> December 2016. [online]. [2016-12-28]. Available at: <<https://www.exchangewire.com/blog/2016/12/22/expert-views-will-become-video-advertising-2017/>>.

13 WEN, G. et al.: *Vlogging: A Survey of Videoblogging Technology on the Web*. In *ACM Computing Surveys*, 2010, Vol. 42, No. 4, p. 2.

14 STANTON, D.: *57% of TV Viewers Report Regular Binge Viewing – Up 12% in Just 10 Months*. Released on 19<sup>th</sup> July 2016. [online]. [2016-12-30]. Available at: <<http://www.businesswire.com/news/home/20160719006011/en/>>.

15 ARLEN, G.: *TV Binge-Viewing: Primarily a Solo Act*. In *Multichannel News*, 2015, Vol. 36, No. 32, p. 17.

16 The topic has been recently discussed by: RADOŠINSKÁ, J.: *New Trends in Production and Distribution of Episodic Television Drama: Brand Marvel-Netflix in the Post-Television Era*. In *Communication Today*, 2017, Vol. 8, No. 1, p. 4-29.

for this dynamic format. The current digital data management options in combination with consumers' ever-changing media consumption habits represent a space for new video marketing strategies and approaches.

Properly processed and subsequently stored data, generated from previous marketing activities combined with knowledge of consumer media consumption preferences, offers customizable targeting options in the digital environment. Video is an inseparable part of the modern digital marketing strategies and should be considered an inherent brand building format along with standard and rich media formats. Theories mostly describe and evaluate traditional advertising formats; however, it is time to consider the digital video format as an effective tool with wide options for theoretical elaboration, especially since online digital video is affecting media consumption behaviour and forming future digital marketing trends. Companies and marketers also need to assimilate communication channels in accordance with dynamic consumer preferences, which are aiming for digital video consumption instead of more traditional banner formats in the digital environment or on TV.

Our article has identified six very specific digital video trends which will shape the advertising market and communication with consumers in 2017. This research might extend the theoretical perception of digital marketing formats and guide companies through the next year with recommendations by which to establish more effective and precise digital marketing approaches.

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