

TV's



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In partnership with:



VIACOMCBS

CBS

SHOWTIME



nickelodeon



COMEDY CENTRAL

BET

CBS ALL ACCESS

PLUTO TV

SIMON & SCHUSTER

5

10

telefe

colors

VidCon

VIACOMCBS



180+
COUNTRIES

4.3B
CUMULATIVE TV
SUBSCRIBERS

140,000+
PREMIUM TV
EPISODES



Last year **Viacom** connected with almost **1.9 million kids, teens, young adults and adults** through consumer insights, covering **35 countries** globally, from Sweden to South Africa and Argentina to Australia

“Research today is an inspiration. It’s where we begin. It informs our strategies. It informs both business and creative. It shapes our brands. It inspires our content and our marketing.”

**- Robert M. Bakish,
President and CEO,
ViacomCBS**

We set out to explore what TV means to people around the world today

- **10,000** people
 - 🇦🇺 1,090 people in Australia
- **10** countries
- **60+** hours of filmed footage

Using GoPro cameras, in-home ethnographies and online surveys, we got to see how consumers are watching TV today.



PEOPLE LOVE TV

“I think TV today is amazing.”

Jason, 45, USA

“I’m a real TV fan.”

Laura, 28, UK

“For me, TV is a great way to be inspired and entertained.”

Julien, 27, Germany

“TV is an easy way to socialize.”

Pawinee, 31, Australia



84%

feel that TV is a part of their daily lives

(vs. 69% globally)

83%

say TV is an important source of entertainment

(vs. 70% globally)



Both questions from A2. To what extent do you agree or disagree with the following statements about TV? Base: Total Sample, adults 13-54 in Australia (n=1,090)

TV has universal appeal

- In today's world, so much separates us
- But TV transcends age, ethnicity, gender, ability and country
- TV is for everyone



*"TV today is very advanced.
There's so much to watch for every
kind of taste, every kind of person
for any time of the day."*

Anita, 37, USA

**TV IS NOW BIGGER &
BETTER THAN EVER
BEFORE**



“Nowadays you have access to everything. If you don't want to see something, you search and look to another service. The possibilities are limitless.”

Julien, 27, Germany

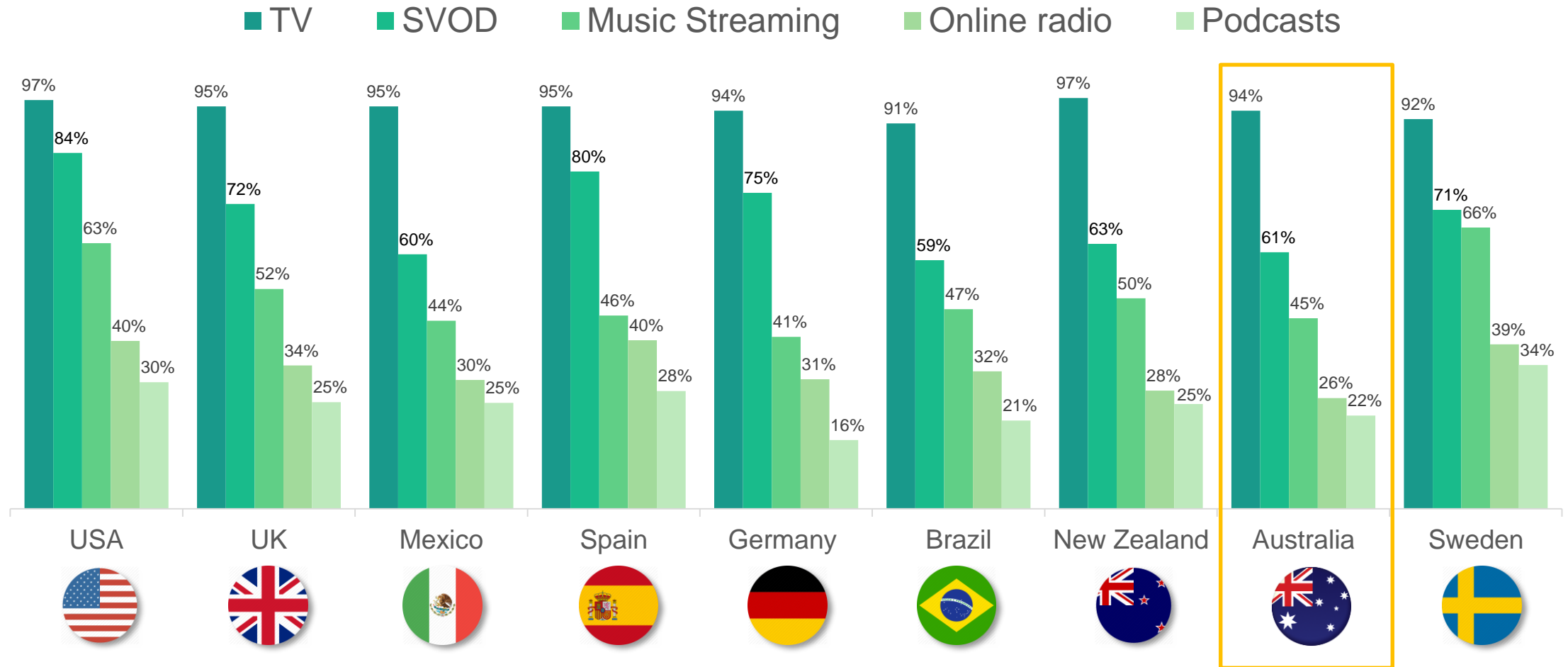
83%

feel excited by all the options they have to watch TV today

(vs. 77% globally)

A1. How much would you say you agree or disagree with these statements about TV? Base: Total Sample, adults 13-54 in all Australia (n=1,000)

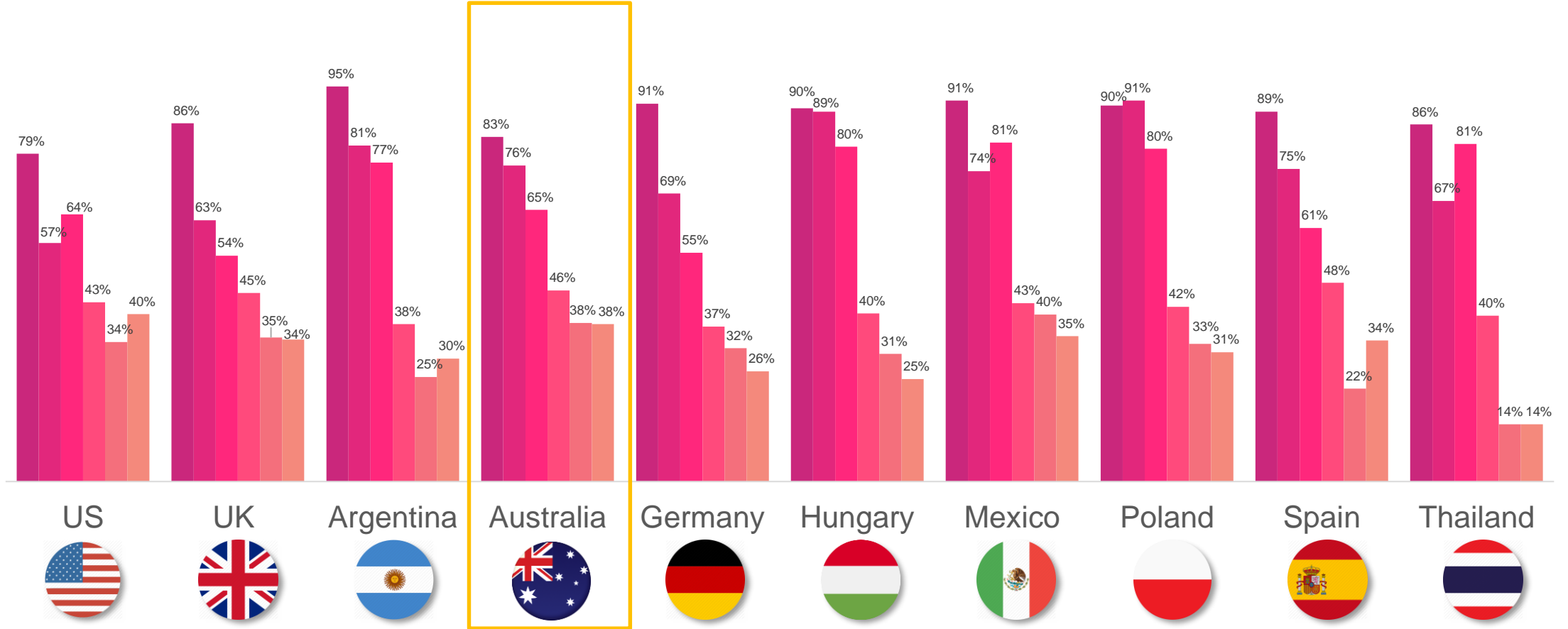
We've seen a proliferation of services



Source: TV:US: Nielsen, AU: FreeTV, NZ: ThinkTV, SE: Statista, others Viacom Global Insights, SVOD Series S5. Which of the following do you have in your household? NET: Regular TV. SVOD: S8. Which, if any, of these online video services do you use at least once a month to watch full-length TV shows?; Nat Rep 13-49 (12,954); Global Web Index: Q2 2018 – Q1 2019, 16-64: Music Streaming, Online radio, Podcasts: In the past month, which of the following things have you done on the internet via any device? Used a music-streaming service, Listened to an online radio station / service, Listened to or watched a podcast.

And a proliferation of devices used to watch TV

■ TV Set ■ Laptop/Desktop ■ Smartphone ■ Tablet ■ DVD/Blu-ray player ■ Video Game Console



B1. Which of these devices do you have in your household and use to watch TV shows and movies? Please select all that apply. Base: Total Sample (n=12,020), adults 13-54 in Argentina (n=1216), Australia (n=1090), Germany (n=1225), Hungary (n=1214), Mexico (n=1289), Poland (n=1173), Spain (n=1134), Thailand (n=1113), UK (n=1221), USA (n=1345).

But content remains king



57%

define TV as “TV
shows and movies”
and not by platforms or
devices
(vs. 62% globally)

28%

define TV as
“binge viewing”
(vs. 15% globally)

Both are
content-
driven!

B6. Looking at the list below, which of the words or phrases describe what TV is today? Base: Total Sample, adults 13-54 in Australia. (n=1,090)

In fact, the device and platform are almost irrelevant

76%

feel that as long as
they can access
what they want to
watch, the device
and service don't
matter

(vs. 73% globally)



A2. To what extent do you agree or disagree with the following statements about TV? Base: Total Sample, adults 13-54 in Australia (n=1,090)

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Too much choice is overwhelming



74%

say there are so many great TV shows coming out, it's difficult to keep up
(vs. 65% globally)

"We get plenty of television, we don't really have a need for any more. There are too many shows to watch!"

Kal, 33, UK

A1. How much would you say you agree or disagree with these statements about TV? Base: Total Sample, adults 13-54 in Australia (n=1,090)

VIEWERS ACTIVELY SEEK EASE & SEAMLESSNESS

People are using TV to help reduce stress



"In our day-to-day we are always running around, with the kids, work, schedules. To sit down and just watch TV, I stop thinking, it relaxes me."

Lionel, 45, Argentina

"TV for me is a way to relax... either from work or school."

Katelyn, 15, USA

88%

find comfort
in TV

(vs. 66% globally)

A2. To what extent do you agree or disagree with the following statements about TV? Base: Total Sample, adults 13-54 in Australia (n=1,090)

Searching for content is time-consuming and frustrating

VOD services require significant effort

7 min

Average time spent in U.S. deciding what to watch on streaming services

Statistic source: The Nielsen Total Audience Report, Q1 2019

"Netflix bothers me because it's so much looking to find something, it takes so long to find a movie."

Mariana, 40, Argentina

"Netflix, Hulu or Amazon...they have their top picks. Sometimes it's a hit but sometimes it's a miss!"

Anita, 37, USA

Viewers want simplicity



85%

wish they were able to
access all their TV
content through one
service

(vs. 80% globally)

79%

wish it were easier to
find the TV shows
and movies they
love

(vs. 77% globally)

Both questions from A2. To what extent do you agree or disagree with the following statements about TV? Base: Total Sample, adults 13-54 in Australia (n=1,090)

People also default to content they know

“If we start spending a lot of time flipping through stuff, we usually go back to something we know. That’s relaxing. Even though we’ve seen it 50 times, we just don’t have the patience to look for something new!”

Anita, 37, USA

Linear TV delivers on simplicity



"I usually just watch 'normal' TV the most because it's the most simple. You just turn on the TV and there is a variety of programs available, where you simply watch what you're interested in."

Julien, 27, Germany

**WHILE TV HAS CHANGED, THE
NEEDS IT SATISFIES ARE MORE
RELEVANT THAN EVER**

TODAY'S TV...

1

INDULGES ME

TV provides an opportunity to indulge in favorite shows

70%

never miss an episode
of their favorite TV
show

(vs. 65% globally)



A1. How much would you say you agree or disagree with these statements about TV? Base: Total Sample, adults 13-54 in Australia (n=1,090)

TODAY'S TV...

2

BRINGS US TOGETHER

TV is easy quality time, as a family or with friends



“For family time, we all enjoy sitting on the couch and cuddling up and watching a movie or TV”

Karen, 33, Australia

#1

activity for bringing the family together is

Playing Outside,
followed by
Watching TV

(globally watching TV is #1)

Q6a. Which, if any, of the following activities bring your family closer together? Base: Total Sample, adults 18-54 in Australia. (n=650)

TODAY'S TV...

3

OPENS OUR MINDS

TV allows for instant global access and there's a need for all voices to be heard

"I feel like it's important to include everyone in TV. For example, when an autistic guy is the main character it makes it interesting and different."

Adrian, 25, USA

"TV today is the gateway to the world. You have access to what's going on locally, nationally and internationally."

Jason, 45, USA

In summary, Today's TV...

Is loved
more than
ever!

Is bigger than
ever, but also
more complex

Needs to be
simplified and
create ease for
consumers

Indulges people,
brings them
together and
opens their minds





“In the future TV will still be just as important to me, probably more.”

Nadine, 33, Germany

Tomorrow's TV

1

Tomorrow's TV will be more important than ever!



2

Yet, as content becomes hyper-personalized through VOD platforms, viewers will experience *more* choice overload and have *less* ability to connect with others.

3

The simplicity of linear TV can tap into viewers' need for seamless experiences.





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