

TV MATTERS

viacom
GLOBAL INSIGHTS

egta.

The
Global
TV Group

Christian Kurz

Senior Vice President, Global Consumer Insights

viacom | BET★ 5 CMT colors COMEDY CENTRAL MTV nickelodeon Paramount Spike telefe TVLAND VH1

<https://insights.viacom.com>

VIACOM

180+
COUNTRIES

250+
NETWORKS

40+
LANGUAGES



*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, VIACOM

We Continue to Invest in “**Knowing Them**”

EVERYWHERE:

- Last year Viacom spoke to almost **1.5 million kids, teens, young adults, adults and families** covering **83 countries** from Sweden to South Africa and Argentina to Australia

EVERY WHICH WAY:

- Online & in-person surveys, focus groups, & workshops, panels, A/B tests, dial tests, in-home immersions, play dates, online communities, expert & artist interviews, semiotics, research safaris, fMRI's, neuroscience, biometrics and facial coding

Never Stop Knowing - Every Audience

Cross-demographics 6-54



Pre-schoolers 2-5



Kids 6-11



Teens 12-17



Young Adults 16-24



Adults 25+



Parents



- Little Big Kids & Their Toys
- Youth: The Bigger Picture
- Today's Social Universe
- TV Re[defined]
- Comedy Across Borders

- TV Matters
- LGBTI Social Acceptance Study
- My Digital Life
- Connected Kids
- F*** Boring, Ignite Passion

- Story of Me: Global Edition
- The Power of Laughter
- Youth Communication Strategies
- Family Recalibration

- Movie Moments
- Kid Power
- Fan Theory
- 2020 Vision
- TV S.M.A.R.T.

So We Know the Audience...

Let's Talk About **Television!**



News headlines continue to declare the death of TV ... and TV Advertising

VIDEO

Is Now the Time to Get Rid of Cable TV?

CR Consumer Reports
Published June 20, 2017

f t e

With one daughter headed to college and another was looking for ways to economize. One easy phone service.

Like many of those who responded to the latest [services](#), Baslow didn't think his bundle provided

"I never used the phone and only watched a few packages," he says. Baslow downsized to an ar

\$ engadget

USA TODAY

NEWS SPORTS LIFE MONEY TECH TRAVEL OPINION 76° INVESTIGATIONS CROSSWORDS

Story from **The Motley Fool**
To Educate, Amuse & Enrich

Cable TV is dying. Here's what comes next

Austin Smith, for Motley Fool Published 9:03 a.m. ET Nov. 15, 2016

Public Access

Community storytelling.

This post was created by a member of the Public Access community. It has not been edited for accuracy or truthfulness and does not reflect the opinions of Engadget or its editors.

Editor's Picks

Giving Dogs A Voice
01.17.17

Meet The DVR And Welcome The Death Of TV Advertising
Dr. Jeff Shuford, @techfromvets 09.30.16 0 Comments 3 Shares

Live from TV LAND

Credit Cards with 0% Balance Transfer Until August 2019

la fleur's

Home News Videos Conferences Magazine Shop White Page

The Death of TV Advertising?

Forbes

MAR 22, 2016 @ 01:05 PM 15,427

Is Traditional Advertising Dead?

f t in g

Jayson DeMers, CONTRIBUTOR
I demystify SEO and online marketing for business owners. [FULL BIO](#) ✓
Opinions expressed by Forbes Contributors are their own.

Traditional advertising might be dead. Marketers have been talking about the "death" of traditional advertising as early as the late 1990s, when it became obvious that the Internet was here to stay and the digital revolution was upon us. But despite various claims of traditional

Is This The Death Of TV Ads In Australia?

Posted by Rita Braby on Wed, Aug 31, 2016 @ 03:08 PM

[Twitter](#) [LinkedIn](#) [Share](#) 1 [Like](#) 0 [Share](#) [Google+](#)

JUST MEDIA

IS THIS THE DEATH OF TV ADS?

Advertising through YouTube and other shows during a week where popular

will be a fight over ad space, but it seems online. Due to the services like Netflix, on service. This drop in television on TV to online.

al, an advertising buying agency, be. They are making this shift because giving the in-depth data and insights in help them make smarter media buys.

strategy and recognize digital video and and information that is available when is they are backed with actionable at reasons to make the move to digital,

ion Advertising?

CNBC

ver. For th than both rkable bec took just 1 ne from ra available fo

TECH

[CYBERSECURITY](#) | [ENTERPRISE](#) | [INTERNET](#) | [MEDIA](#) | [MOBILE](#) | [SOCIAL MEDIA](#)

People are ready to abandon their TV sets in record numbers, study suggests

- Only 23 percent of people globally preferred watching TV on a TV set, a 55 percent decrease from the year before according to an Accenture survey
- More than 40 percent of TV viewers opted for a laptop or desktop computer
- Another survey by GfK suggested people without cable or satellite subscriptions

This isn't the first time new technology has impacted the entertainment industry...

In 1982, VCRs were perceived as a threat...

yet box office revenue continued to climb

“The investment of hundreds of millions of dollars each year to produce quality programs to **theaters and television will surely decline.**”

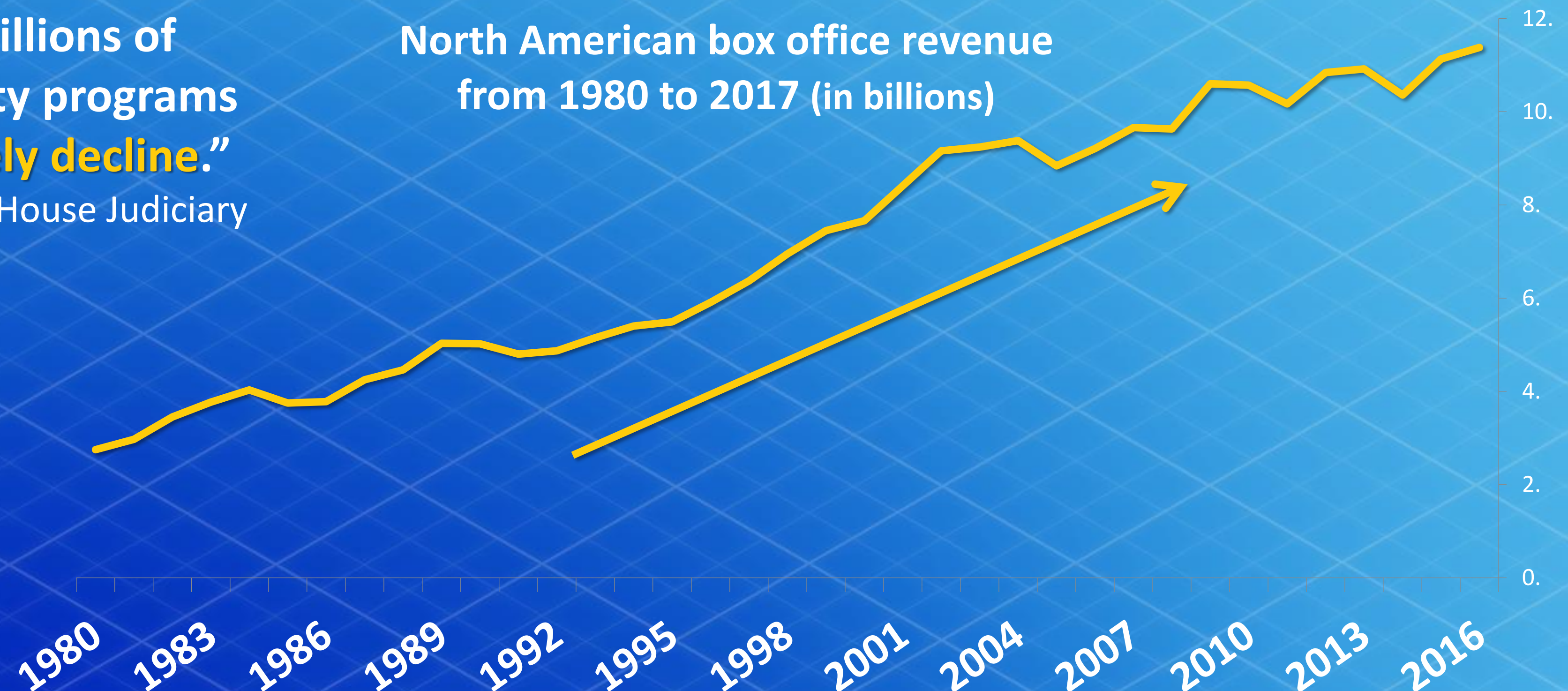
MPAA head Jack Valenti, testifying before a House Judiciary Subcommittee



VHS 1980s

Source: Box Office Mojo

North American box office revenue
from 1980 to 2017 (in billions)





I don't watch TV....
...and neither do my kids!

Just because you, **a media/advertising professional**, possess these behaviors does that mean everyone else in this country does too?



TV Nation / Ad Nation:
attitudes, behaviours
and motivations



Two Nations and
Their Perceptions of
Media Habits



Do We Have Consensus? – How the Ad Community's
Behaviors Became America's "Norms"



AdNation: Normal
Aussies like TV



Gens de com' / Gens
normaux

NO!

WE, the Media Professionals:

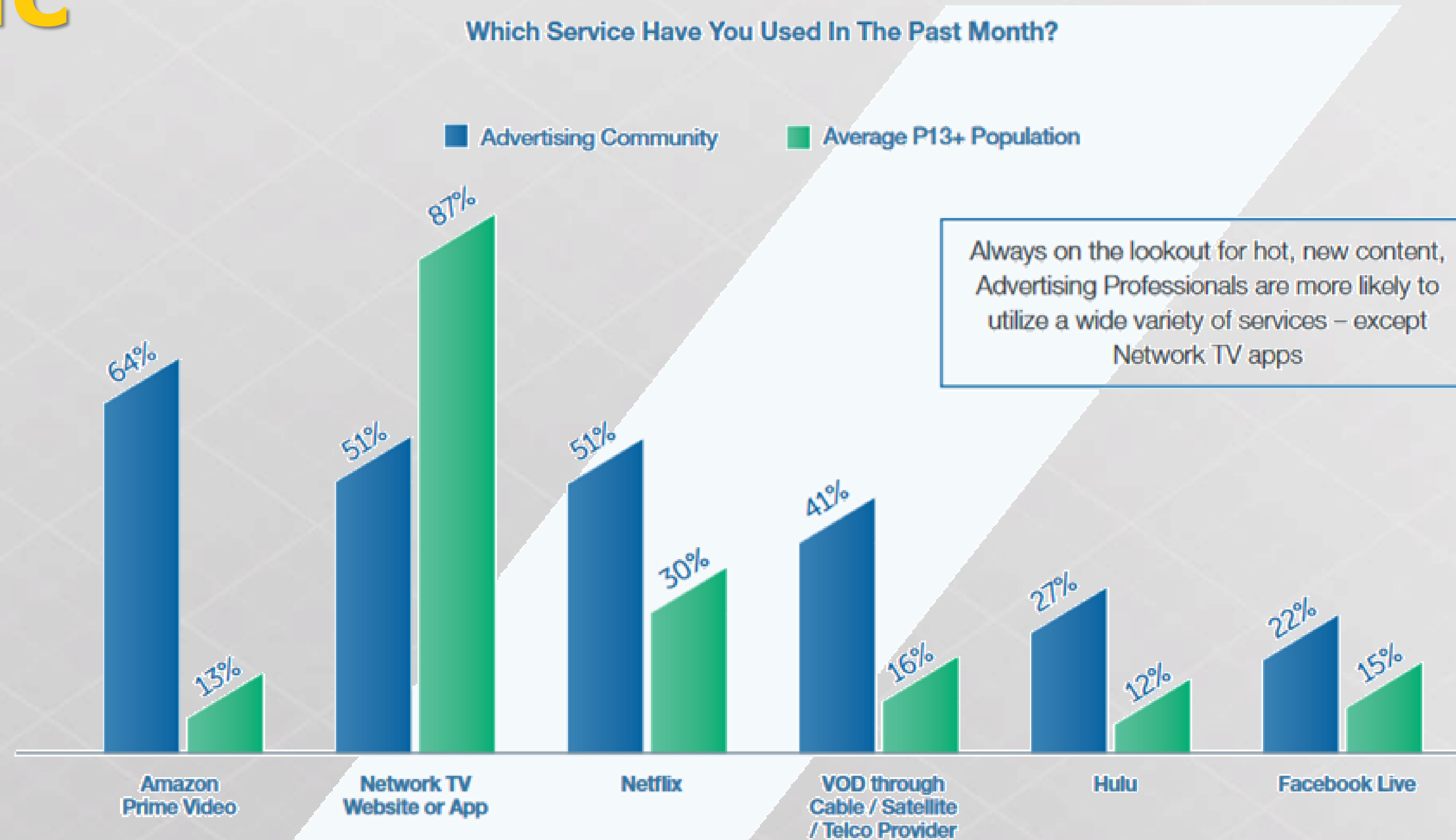
- Primarily Live In **Urban** Areas,
- Skew Male And **Younger**, And
- Are More **Affluent** Than The Average Population.

WE are also:

- Career-Driven **Workaholics**,
- More **Stressed** Than The Average Population,
- Always **Connected** And, Yes,
- More Likely To Be **Early Adopter** Gadget Gurus.

Source: VAB

We Are Content Thirsty And Platform Agnostic



Source: VAB / Research Now "Advertising Community" Survey, February 2017. Q17: Which of the following services have you used in the past month? Respondents = 254. "Average P13+ population" data based on GfK Comparing Streaming Services 2016 study, U.S., P13-64; "network TV website or app" based on comScore MediaMetrix Multiplatform data, January 2017. Facebook Live is based on VAB analysis of eMarketer November 2016 data and projected to the U.S. population.

We Vastly Under-Estimate How Much Time Is Spent With TV By The Average Adult

In an average day, approximately how much time do you spend, and how much time do you think the average adult spends, watching TV on a TV set?

The average adult spends **double** the time watching TV than estimated by most media professionals



Avg Daily Time Spent: 2 Hours Or Less



Avg Daily Time Spent
(hrs:mins)

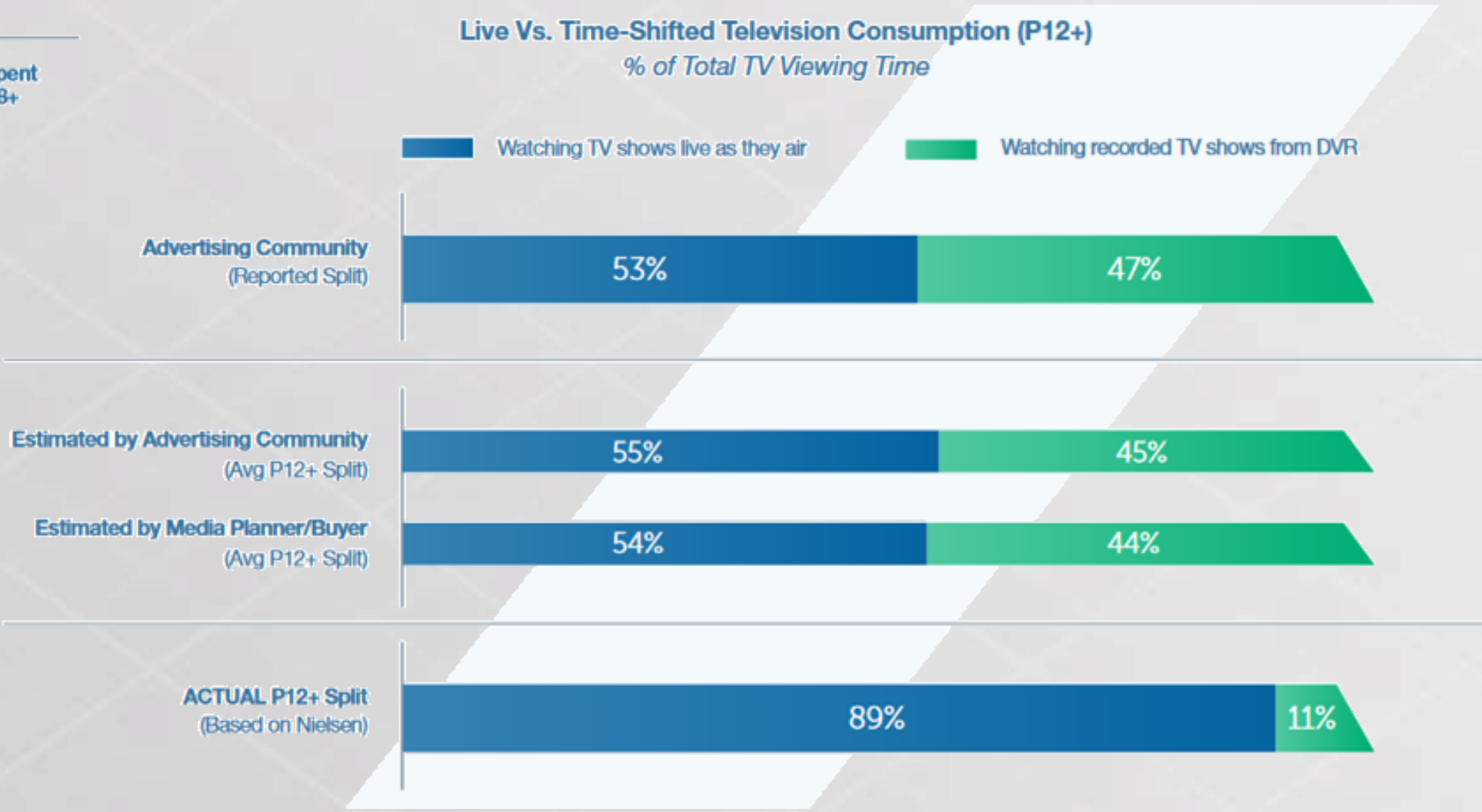
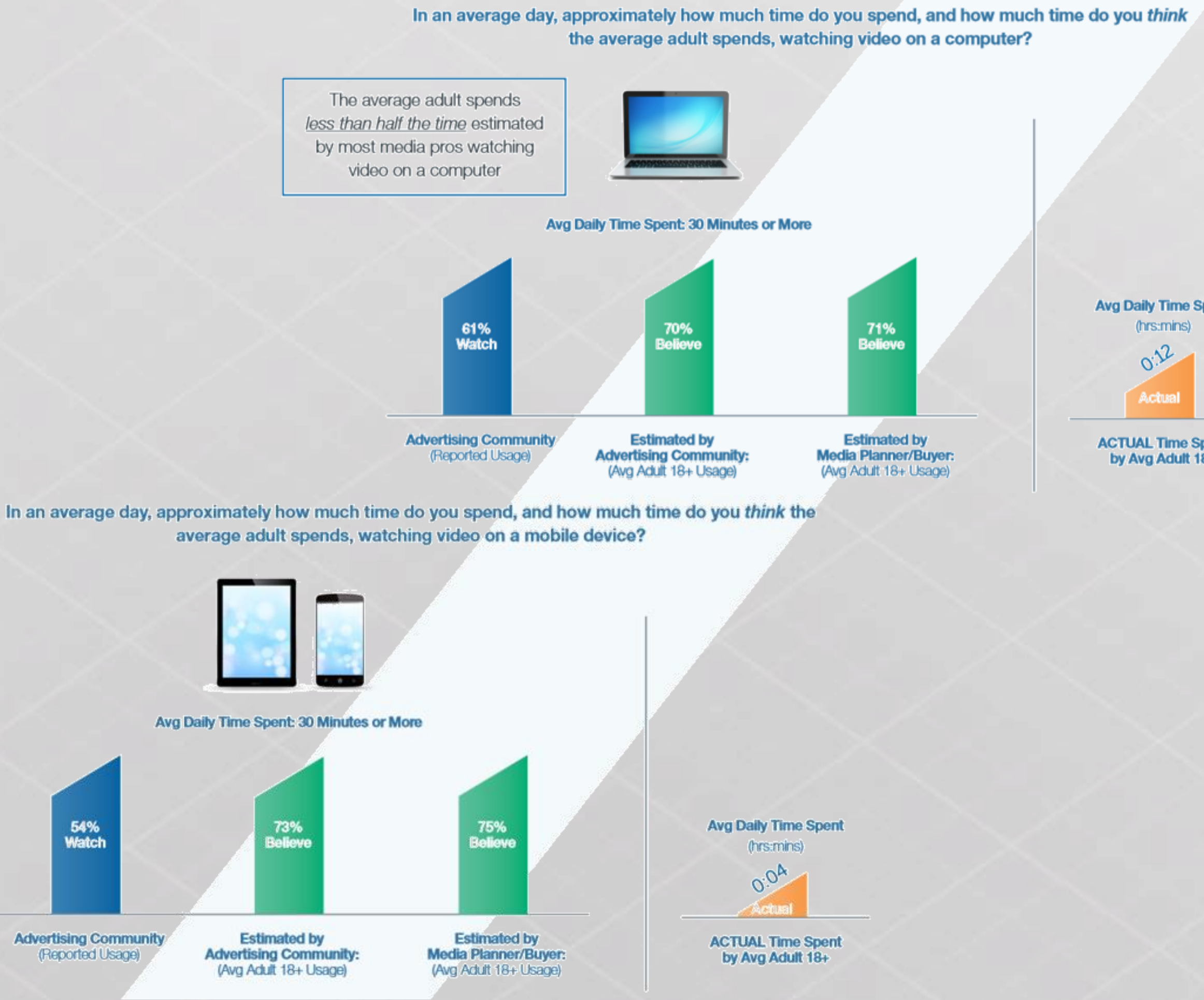
4:35

Actual

ACTUAL Time Spent
by Avg Adult 18+

Source: VAB / Research Now "Advertising Community" Custom Survey, February 2017. Q19: In an average day, approximately how much time do you spend watching TV on a TV set (live, recorded / from a DVR or VOD)? & Q20: In an average day, how much time do you think the American public (P18+) spends watching TV on a TV set. Total Respondents = 254; Media Planner/Buyer Respondents = 188. Data doesn't include those respondents who answered "don't know." "Average A18+ Population" data based on VAB analysis of on Nielsen Comparable Metrics Report, Q3'16, and reflects an average week between June 27th, 2016 - September 25, 2016 for total population.

And Vastly Over-Estimate Computer, Mobile and Time-Shifting



Source: VAB

We are NOT Normal

We are NOT the Customer

We are a (strange) Sample of 1

So, What **Does** The Consumer Think?

1. How do audiences **view the television landscape**
2. Gain a deeper understanding of the **continued value and power of TV**



We spoke to people all over the world

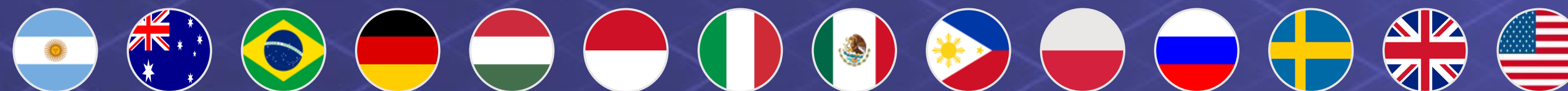
Online survey:

14
COUNTRIES

6-44
YEAR OLDS

15,600
PEOPLE

700
VIDEO VIEWING
SOURCES

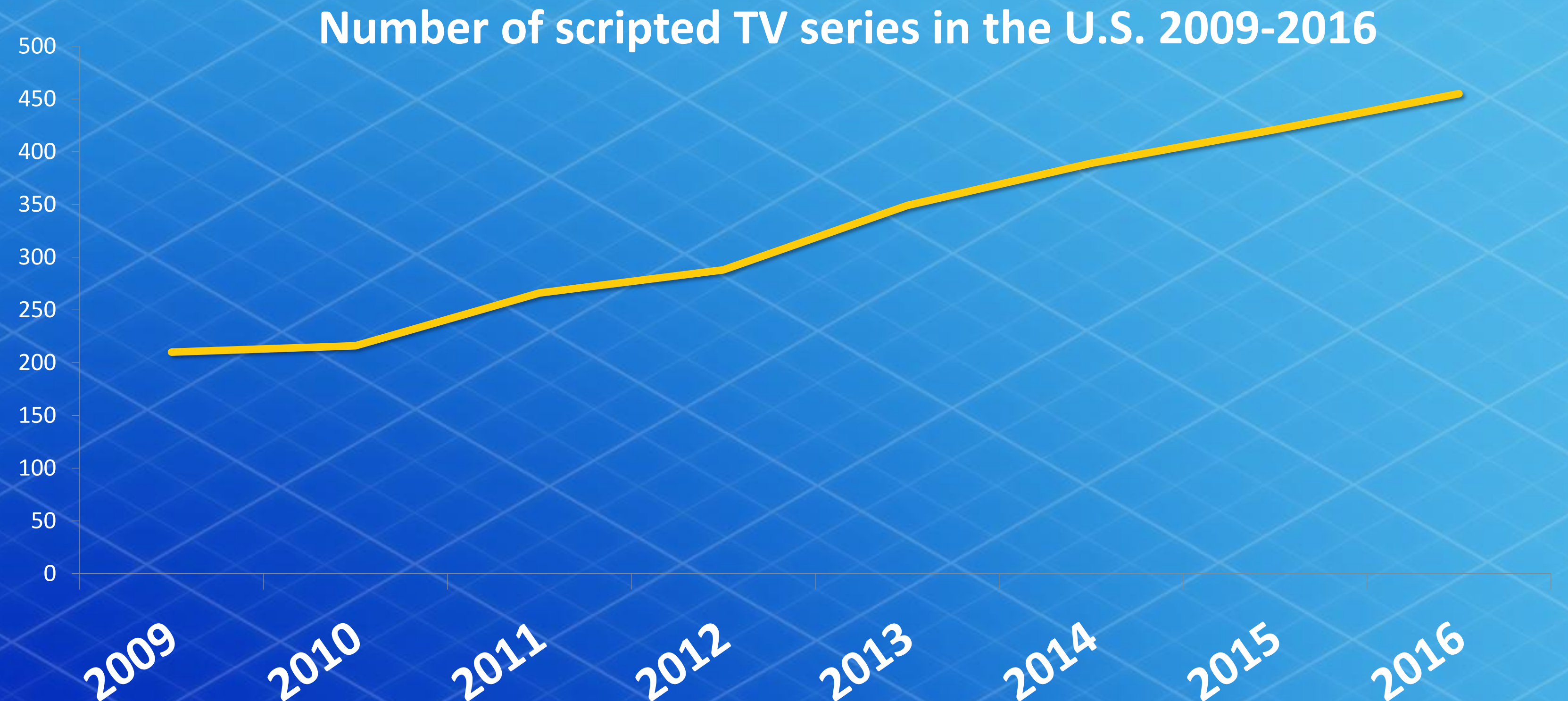


Argentina, Australia, Brazil, Germany, Hungary, Indonesia, Italy, Mexico, Philippines, Poland, Russia, Sweden, UK, USA

Television is experiencing a boom

"This is Peak TV. Not since the early 1980s — when cable became a serious challenger to the Big Three broadcasters — has the **television industry experienced such rapid growth.**"

- *Vulture, The Business of Too Much TV*



Various sources (FX Networks); Wall Street Journal; Nielsen; Wikipedia

Television is experiencing a boom and audiences around the world are benefiting

67%

TV is an important source of entertainment in my life

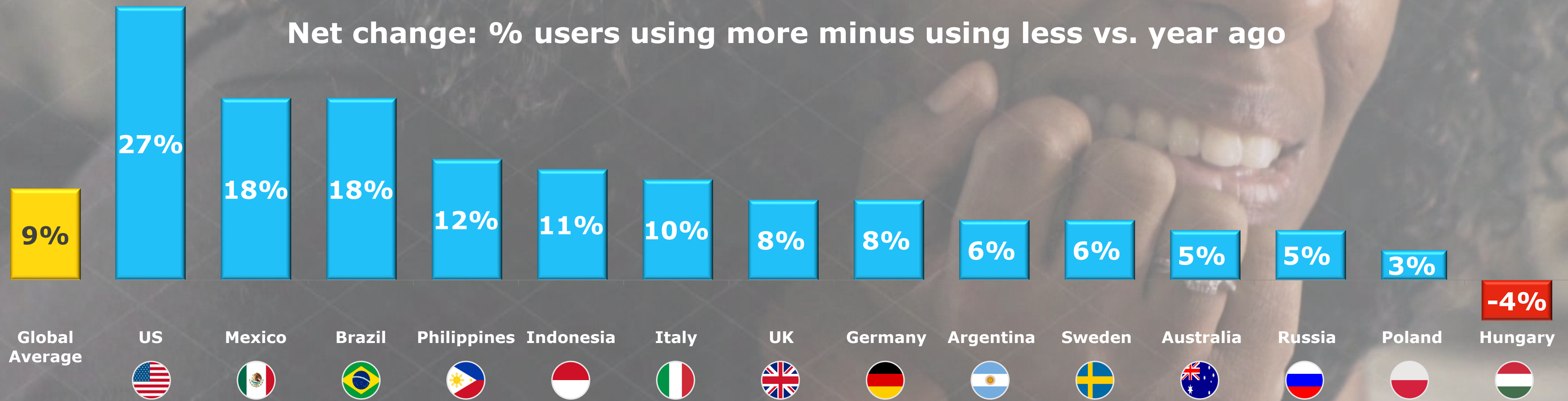
70%

I know where to find TV shows I want to watch

56%

Too many great TV shows to keep up with!

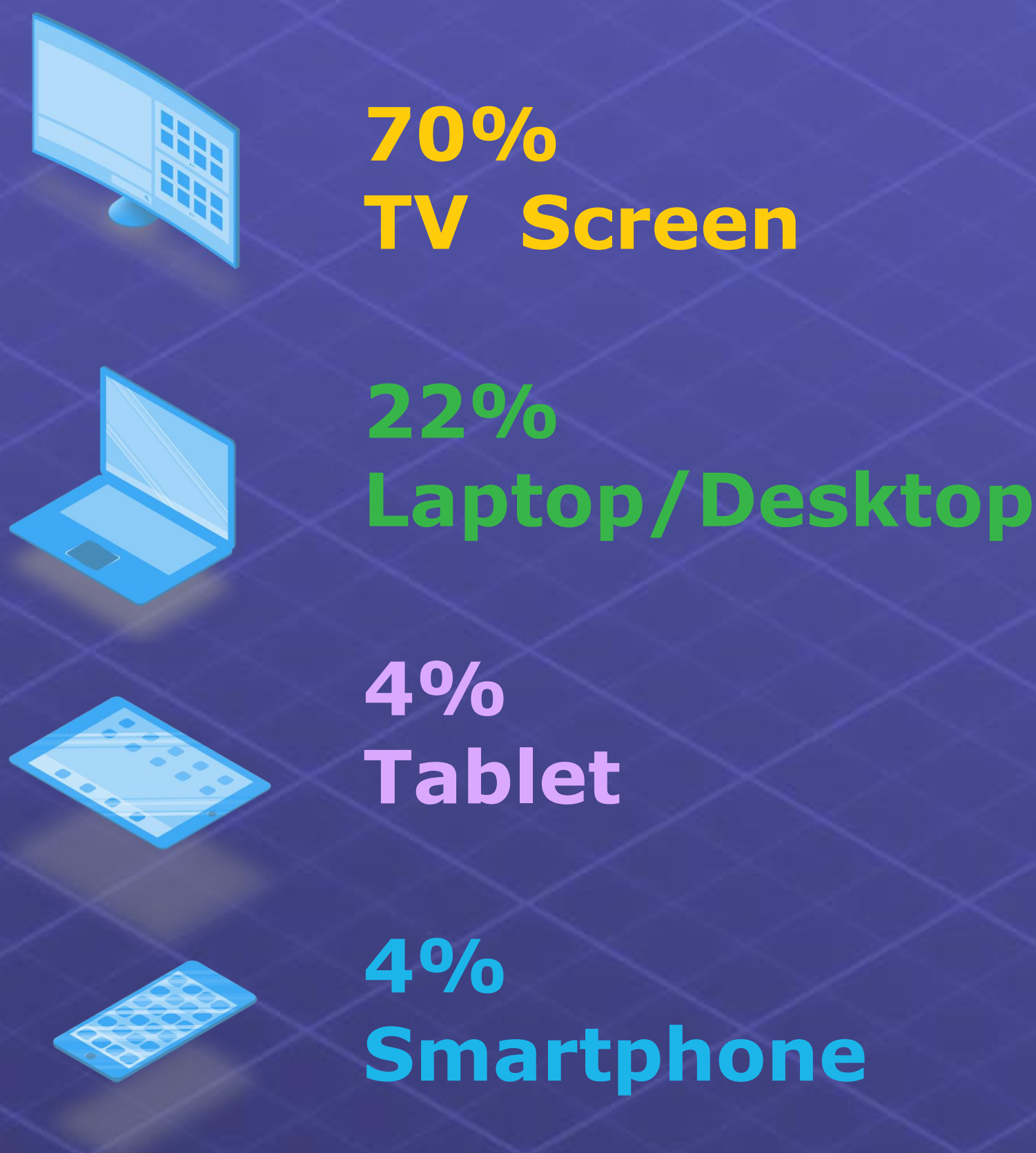
Viewers feel they are watching *more* content than last year



S6b And would you say you are spending more, less or the same number of hours a day watching TV shows or videos as you were a year ago? Base: All respondents 6-44 (n=15602)

When it comes to viewing content, the **larger screens** continues to win

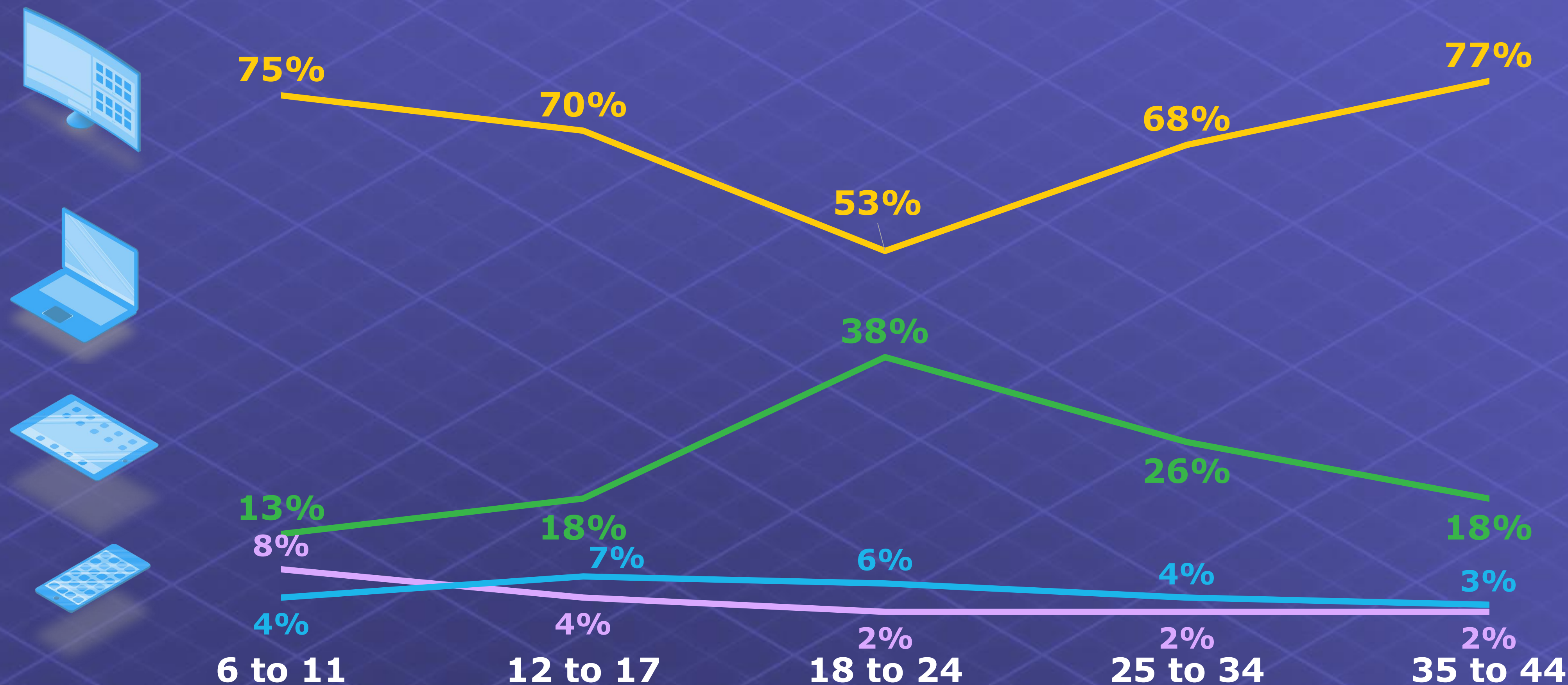
Preferred screen on which to watch content



C10.: You told us you use the following devices to watch TV shows or videos. Please can you select the one device that you most prefer to use in general to watch TV shows or videos on. Base: Respondents aged 6-44 (n=15602)

But there is a dip for 18-24s where laptop/desktop becomes more important

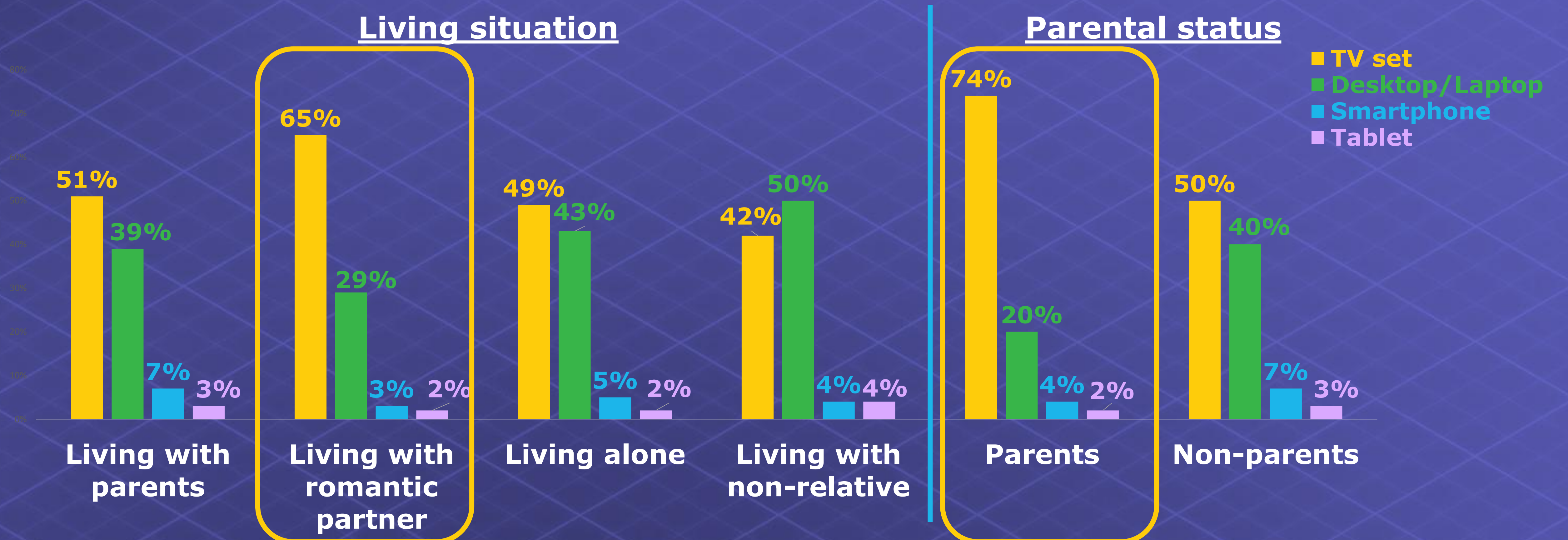
Preferred screen on which to watch content



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Taking a closer look at 18-24s, living situation has a significant impact on screen choice

Preferred screen on which to watch content

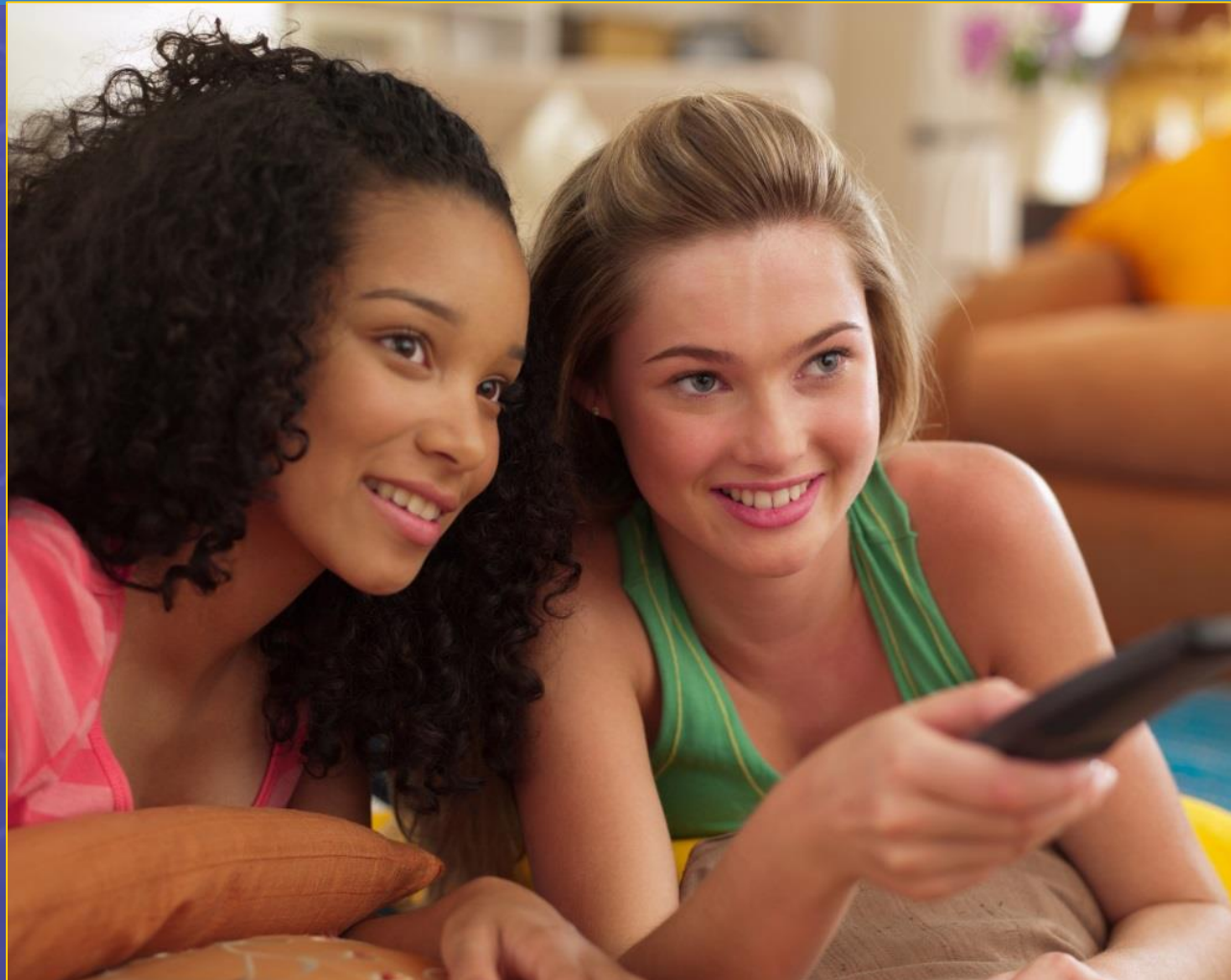


C10.: You told us you use the following devices to watch TV shows or videos. Please can you select the one device that you most prefer to use in general to watch TV shows or videos on. Base: Respondents aged 6-44 (n=15602)

Background on each life stage

KIDS 6-11

- Supported By Family
- Tight Restrictions



18-24

- Time Of Transition
- Reprioritizing Time
- \$ Poor
- Price Sensitive



TEENS 12-17

- Supported By Family
- Increasing Independence

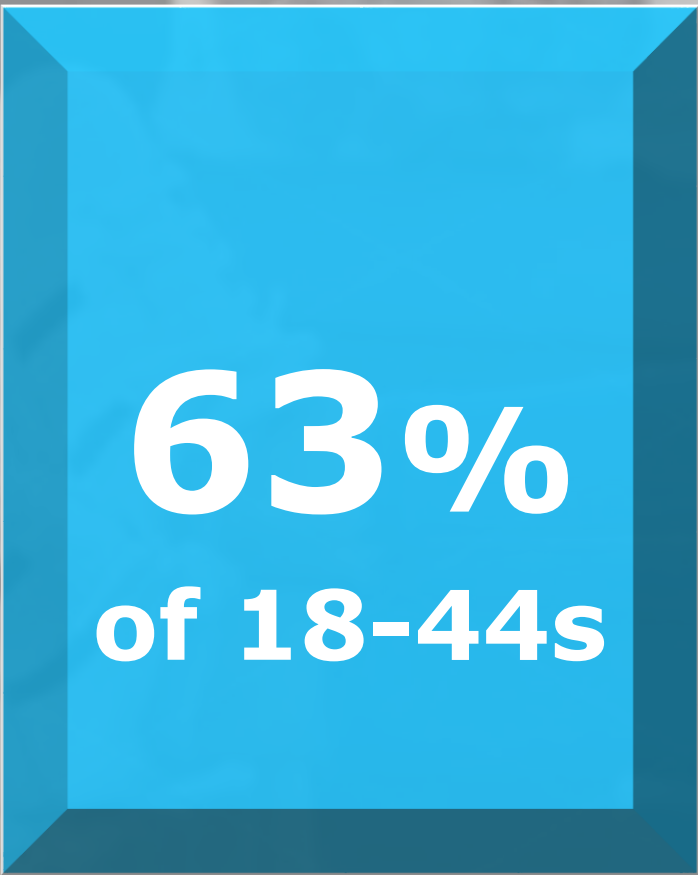


25+

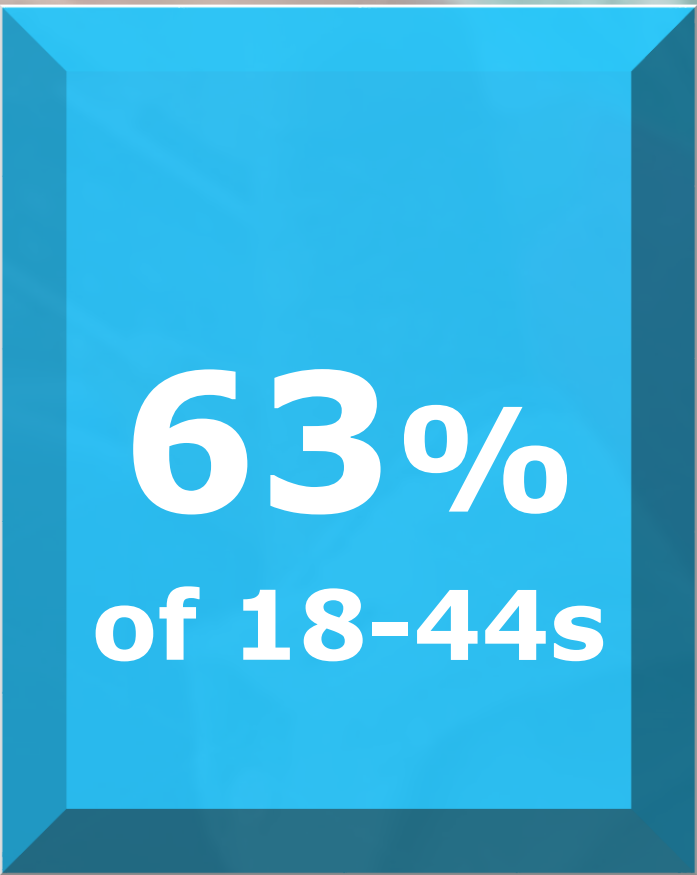
- More Established (often w/ kids)
- More Reliable Income
- Time Poor

Content plays an *even greater* role in the lives of kids & teens

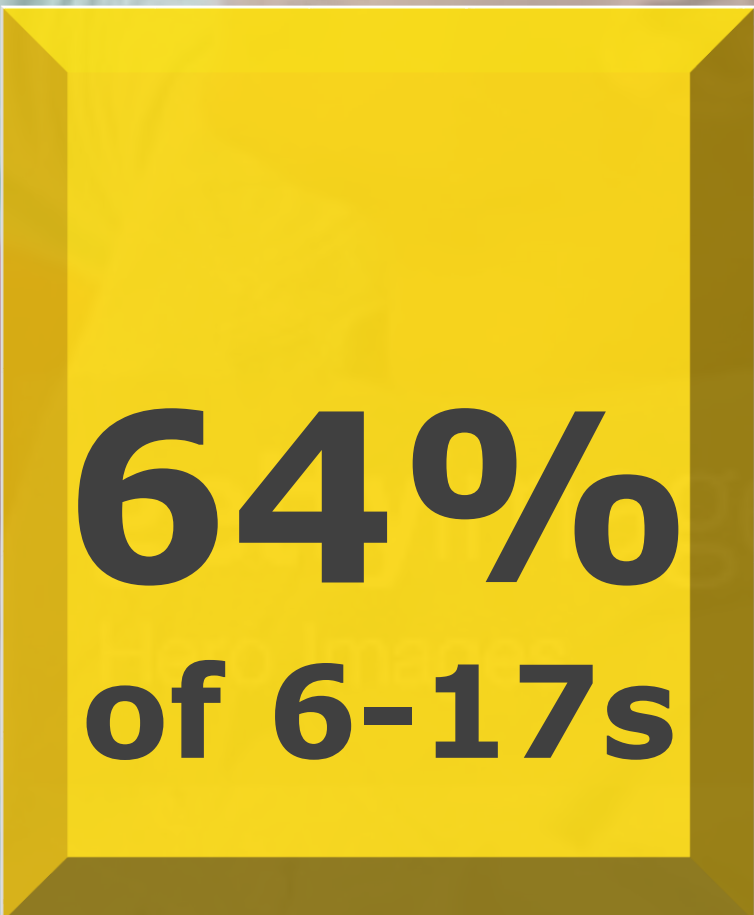
“TV is an important source of my entertainment”



“TV part of my daily routine”



“Important to watch new episodes of my favorite shows when first shown”



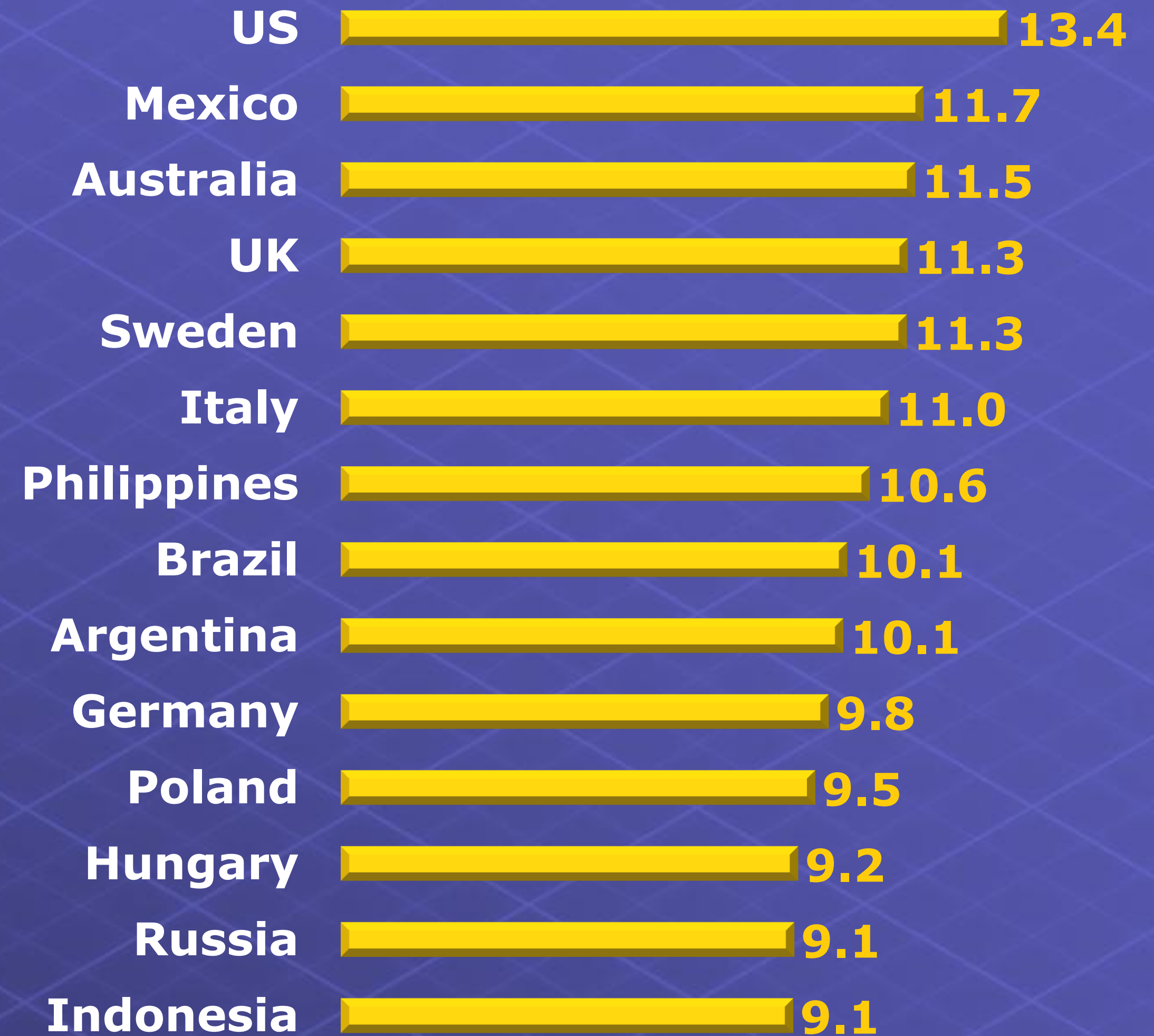
% agreeing

B1. To what extent do you agree or disagree with the following statements about TV? Base: All respondents with TV 6-17 VS. 18-44, aged 6-44 (n=14613), percentage points difference (for both 64% 6-17s vs 75% 18-44)

Growing
number of
devices on
which to
access content

On average,
people access

10.5 devices
in the home
(teens highest at **13.0**)



Average number of each type of device in household

S5c. What is the total number of each of the following devices in your household? Base: All respondents aged 6-44 (n=15602)

Simply Put:

TV
MATTERS

VIACOM

BET★

5

CMT

colors

COMEDY C TVLAND

MTV

nickelodeon

Paramount

Spike

telefe

TVLAND

VH1

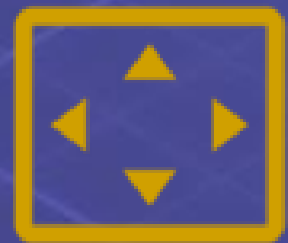
TV is the **prime real estate** for advertising overall and video advertising in particular!



Brand building



High quality programming



Full Screen



Sound on



Shared viewing



Viewed by humans



High completion rates



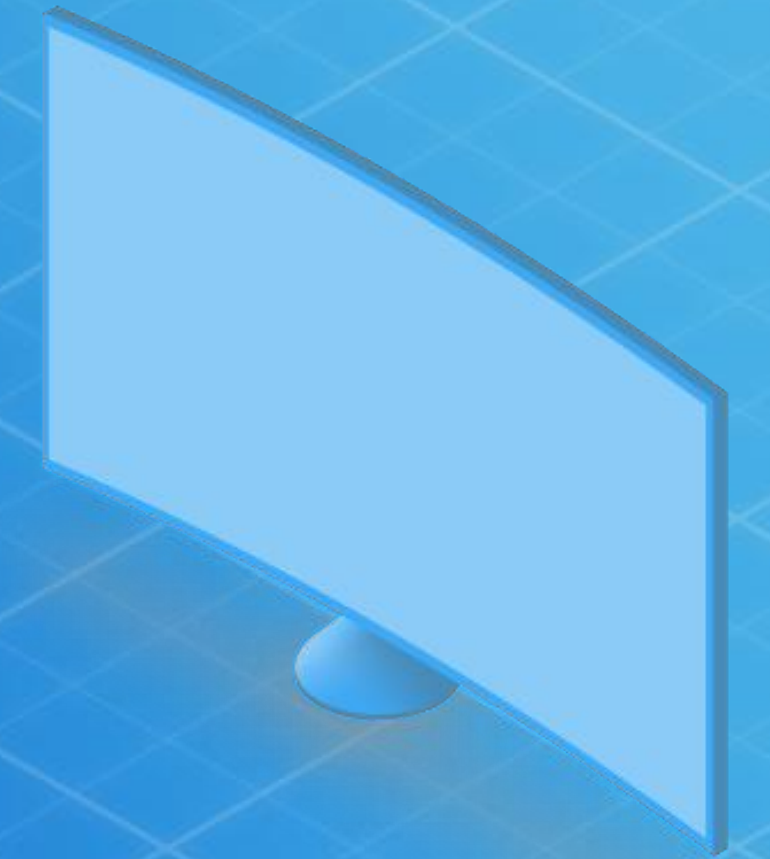
Robust measurement

... And TV Is **Brand Safe!**

- **Whitelisted**
- **100% transparency**
- **Highest rate of viewers' trust**
- **Regulations**
- **Measurement**

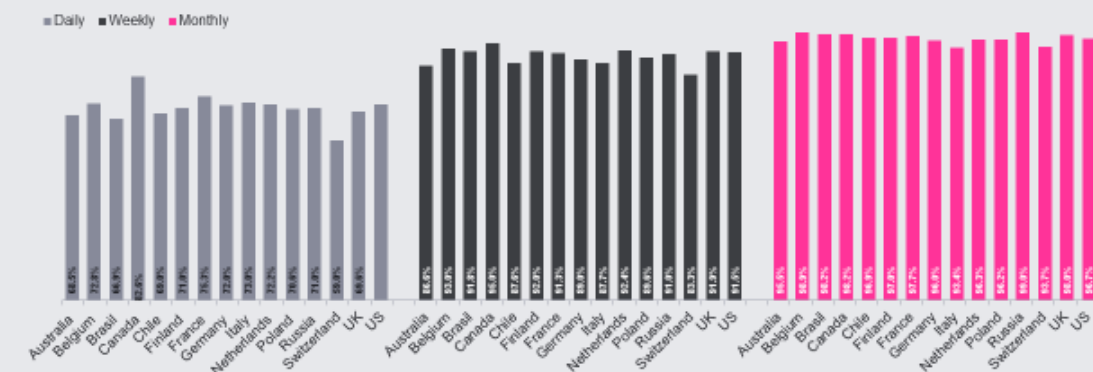
Proof of TV's **Power and Popularity**

- ▶ **Reach**
Unbeatable scale and reach
- ▶ **Resilience**
TV viewing is steady throughout a decade of innovation and different stages of life
- ▶ **Popularity**
TV has by far the biggest share of attention
- ▶ **Impact**
TV is the most trusted and impactful form of advertising
- ▶ **Effectiveness**
Advertisers invest in TV advertising because it pays back
- ▶ **Complementarity**
TV makes all other media more effective



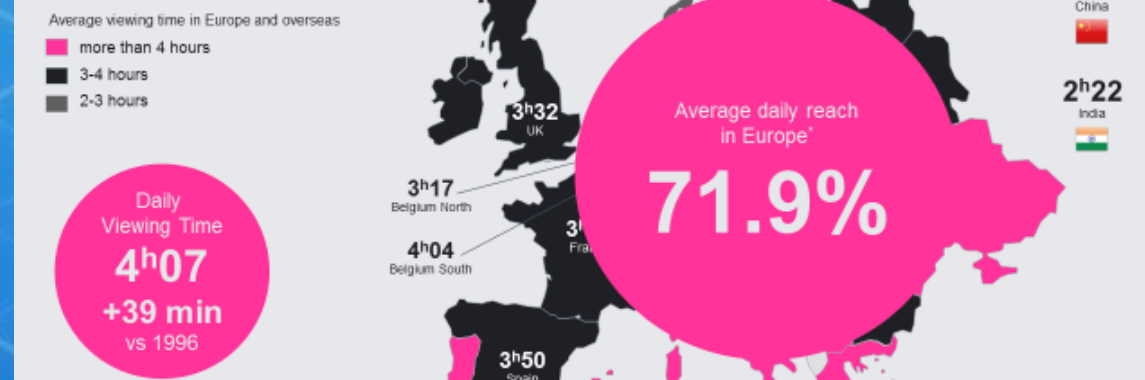
There's Data/Measurement For All Of This!

Incomparable reach all over the world

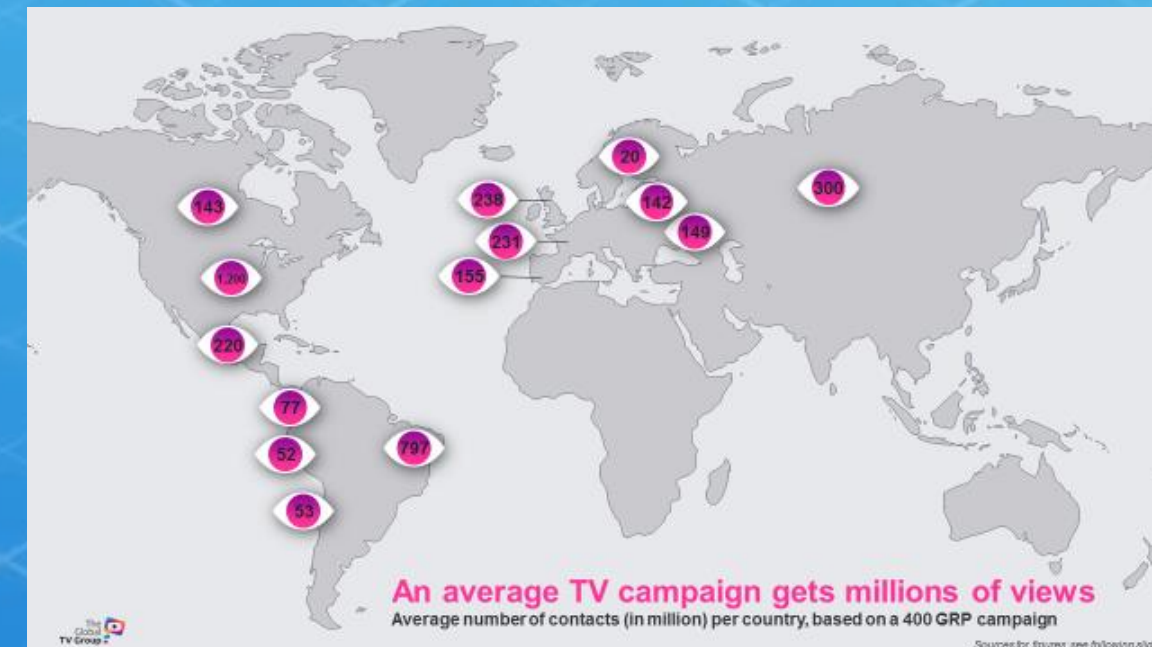


GLOBAL

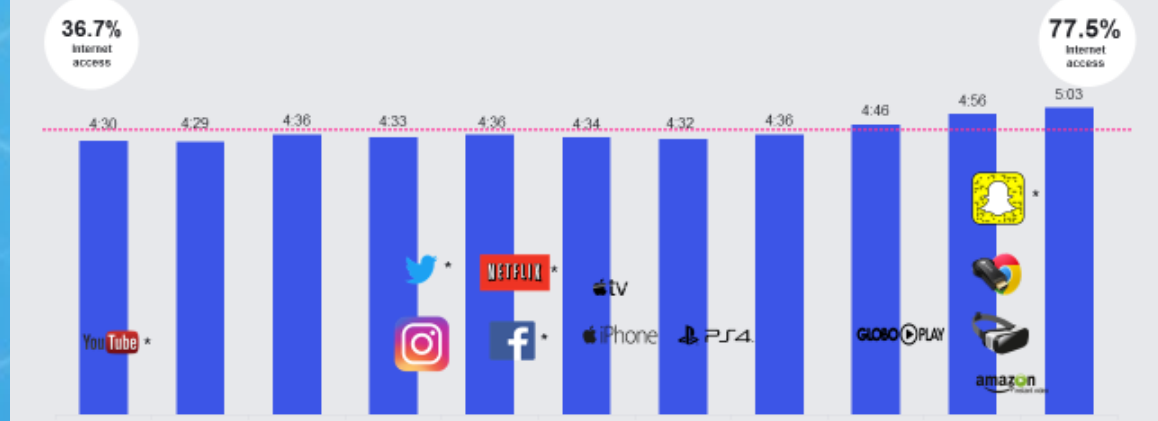
Linear TV is resilient and at the core of the Total Video ecosystem



EUROPE

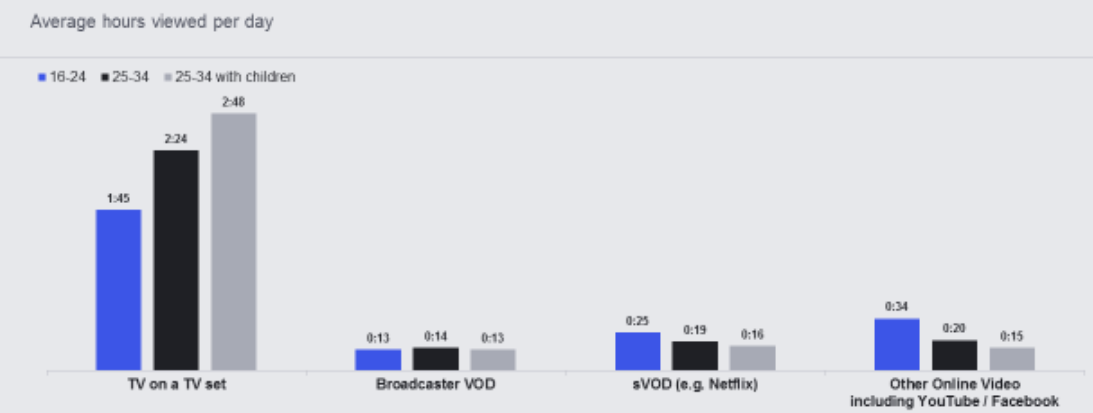


Hours of TV viewed on a TV set per day



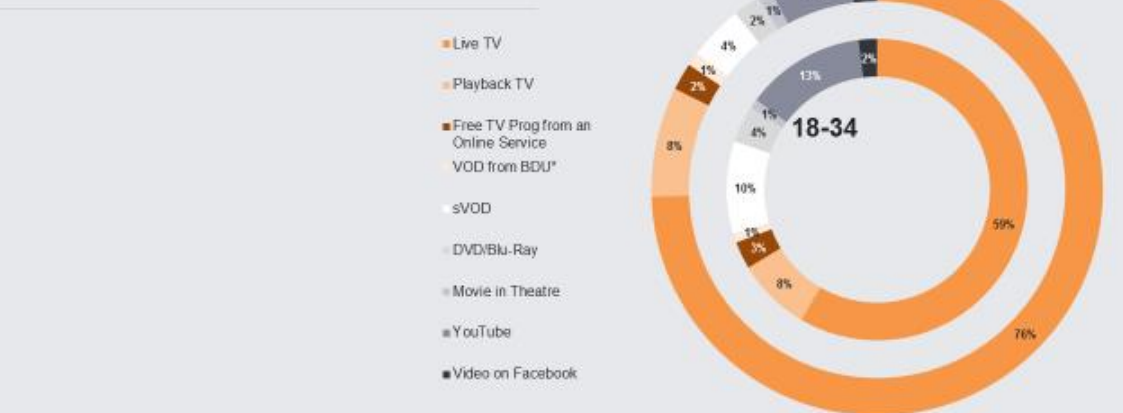
BRAZIL

British Millennials' TV viewing increases as they get older and have kids



UK

TV is 87% of video time in Canada



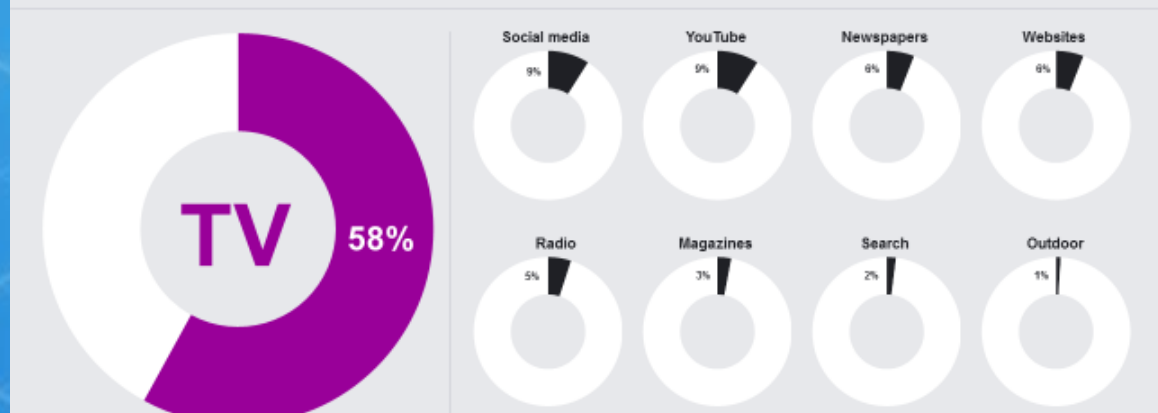
CANADA

In the US, 83% of TV is watched live



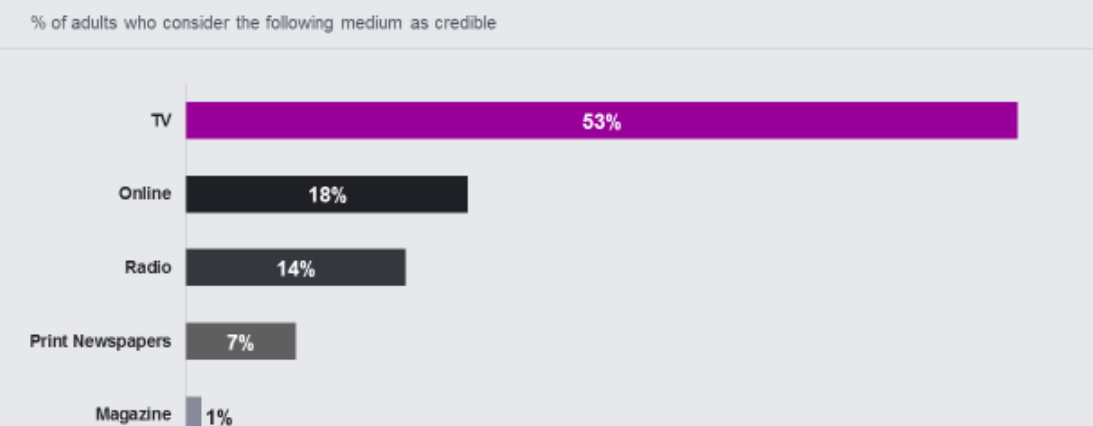
US

TV ads evoke emotions more than ads in other media



UK

TV is by far the most trusted form of advertising



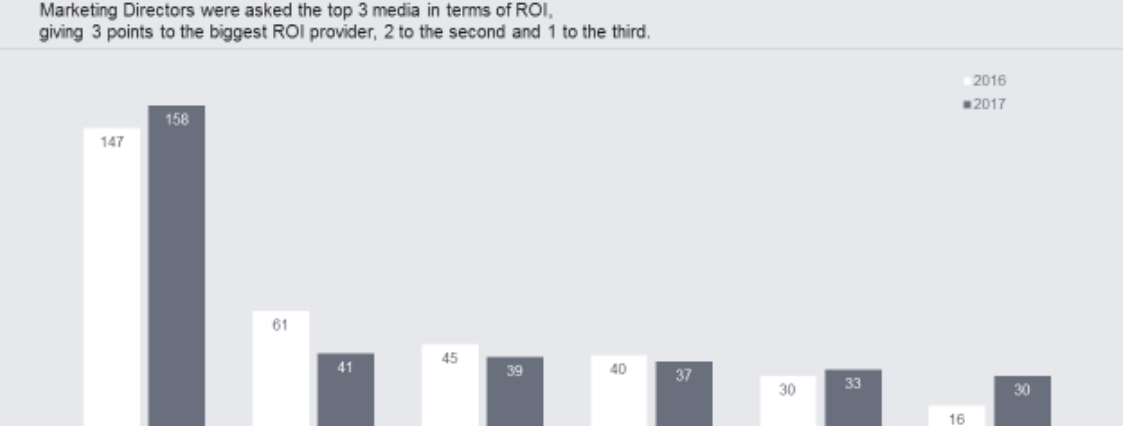
PERU

TV is the most efficient medium to drive sales



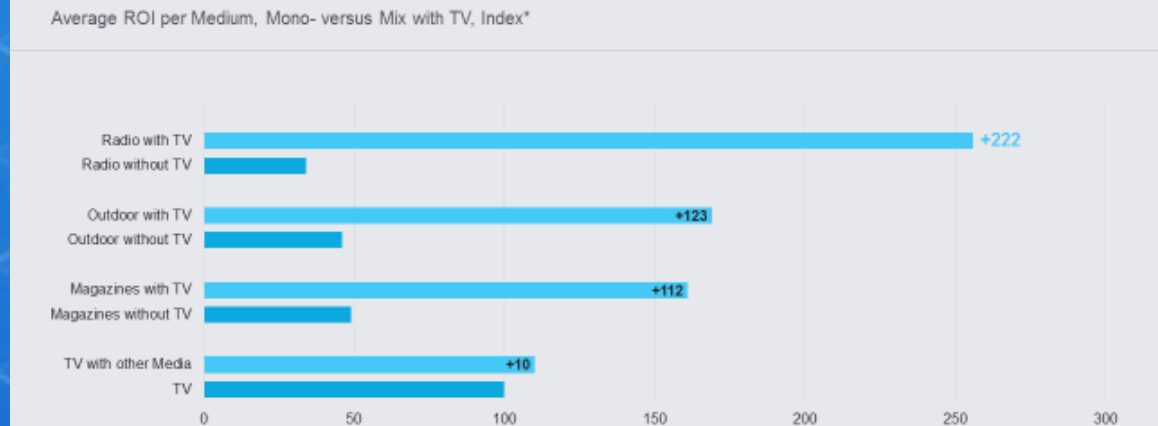
CANADA

TV provides the best ROI for advertisers



SPAIN

TV boosts other media



GERMANY

The Global TV Deck:

http://bit.ly/Global_TV_Deck

In Conclusion:

- TV is not dead and it's not dying, in fact it **is booming**
- Media/Marketing professionals are **not normal**
- Audiences benefit and **consume more TV overall**
- The **Hierarchy of Screens** remains in tact
- Lifestage and living situation drive behavior, **NOT Generation**
- **TV Advertising works** and is accountable
- **TV = Reach, Emotion & Trust**



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Thank You, Merci, Gracias, Danke, Grazie,
Obrigado, Спасибо, köszönöm,
Salamat, Dziękuję Ci, Tack