



## CONSUMER INSIGHTS NOVEMBER/DECEMBER 2014

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## VIACOM'S "GETTING WITH THE PROGRAM: TV'S FUNNELS, PATHS AND HURDLES"

The goal of "Getting With The Program: TV's Funnels, Paths & Hurdles" was to answer a single, seemingly simple question: How do people watch TV? To arrive at this answer, the study explored how audiences discover, watch and become fans of TV shows. The findings reveal that the proliferation of devices and sources is having a positive impact on viewership and fandom. In our analysis of "yesterday's" viewing cycle, multi-screen viewers (those who used multiple screens and sources) demonstrated a higher preference for live TV and stronger network loyalty compared to single-screener (those who only used one screen).

### Key Findings

**Funnels to Fandom.** The process of becoming a fan occurs over the course of a five-stage process, or a TV viewing funnel. The journey starts with discovery of a show, followed by research, selection, fandom and ultimately sharing.

- **Discovery:** in-person word of mouth is the #1 source for show discovery with 90% of respondents indicating so, closely followed by TV promos and word of mouth online or via social media.
- **Research:** once aware of a show, viewers usually further investigate show details by watching an episode to find out more (55%), checking when it airs next (42%) or discussing with friends or family (35%).
- **Selection:** when deciding what device or source to trial a TV show on, live TV is the most popular source (57%), followed by streaming (22%), DVR (10%) and VOD (6%).
- **Fandom:** once a viewer becomes a fan, they first want to know when the show airs on TV (61%), whether it is on live TV (52%) and whether it is in-season or not (48%). The most popular source for continuing to watch a show is live TV, with 53% indicating so. Among fans, marathoning is popular across all age groups: 83% of Millennials say this is one of their favorite ways to watch, compared to 72% of Gen Xers and 65% of Digital Natives.
- **Sharing:** 61% of viewers recommend a show to others in-person, while 38% invite others to co-view. Among Digital Natives (ages 13-17), invitations to co-view are most prevalent at 47%, followed by Millennials (ages 18-34) at 40% and Gen Xers (ages 35-44) at 29%.

**Paths to Viewing.** Despite the growing number of devices and sources to watch TV, live TV still matters to all age groups.

- Gen Xers show a heavy reliance on live TV: 45% only watch live TV and 80% watch live TV at any point in a given viewing path.
- While Millennials tend to stream more than Gen Xers, they still rely on live TV: 33% only watch live TV and 66% watch live TV at any point in a given viewing path.
- Digital Natives rely on a mix of streaming and live TV: 45% only watch live TV and 70% watch live TV at any point in a given viewing path.

**The Future of TV is Bright.** Viewers are very positive about TV's future when asked to look ahead five years.

- 84% agree that they will have more options for where, how and what to watch.
- 83% will watch a greater variety of TV programs.
- 79% will keep up with more TV programs at the same time.

→ 76% expect better recommendations from sources and devices.

### **Implications:**

Understanding the often complex paths consumers take to discovering and becoming fans of content will help brands leverage multiplatform opportunities even more strategically.

### **Methodology:**

The study involved in-person interviews in Boston and Chicago and online surveys of more than 1,500 U.S. Viacom viewers ages 13-44. The online survey included digital diaries on TV viewing paths, for which respondents listed up to 10 TV programs in the order they watched them “yesterday,” and logged more than 7,000 shows.

## **VIMN’S “KNOWING YOUTH: 2020 VISION”**

In this global project, “MTV Knowing Youth: 2020 Vision” explores young people’s outlooks on the world and their visions for the future – specifically the year 2020. The project goes beyond the overall picture of Millennials’ attitudes that have been emerging over the years, to look at their opinions and predictions for the world overall, as well as their personal aspirations. The findings reveal an overwhelmingly positive outlook: Millennials envision a tomorrow that is better than today, and they are excited about what it means for them.

### **Key Findings**

#### **In general, the world will be a better place**

→ Millennials are optimistic about the future. They do have concerns — about the economy, their ability to find work, and technology getting out of hand — but they generally believe the only possible future is one that is better than today. They see changes to society as having great potential to improve the economic and political issues that they observe.

#### **There will be more renewable energy and less waste**

→ While environmental issues aren’t necessarily a frequent topic of conversation with friends, Millennials are an eco-minded generation because they were brought up with the realities of a planet running out of natural resources. They hope for a world that makes the most of what’s available. Technology can aid in this journey, as long as it doesn’t produce too much waste.

#### **The world will be more peaceful and tolerant of diversity**

→ While the desire for peace does not make Millennials unique from other generations, this is nonetheless a strong theme for them. They don’t want conflict in the world, and their first-hand experience in mixing with other cultures causes them to struggle with the concepts of intolerance and war. They see it possible to communicate, share, and identify with people who are different from them.

### **The Methodology**

This report was based on an online survey of over 6,800 people ages 15 to 24 across 32 countries, as well as qualitative work in 17 markets. The qualitative work had a sample of 72 participants and included in-person interviews in respondents’ hometowns, as well as user-generated, ethnographic videos.