



CONQUERING CONTENT

How viewers discover new shows, and why they choose some content over others

OCT
2022



ENTERTAINMENT
RESEARCH

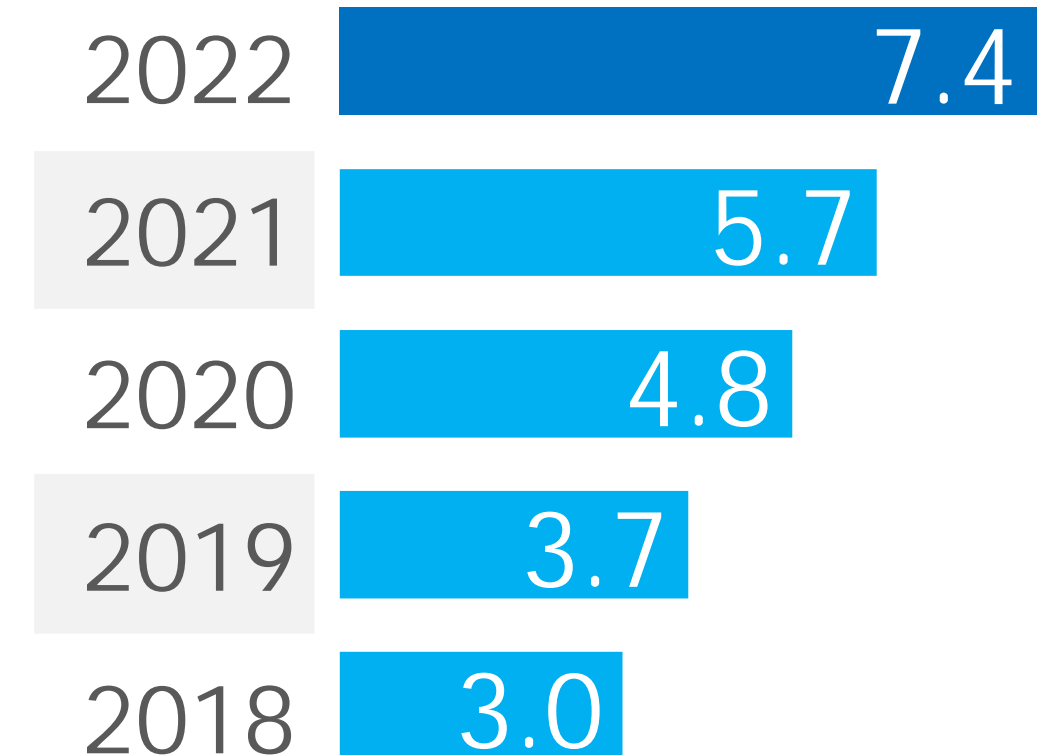
EXCERPT OF FINDINGS



MVPD, VMVPD, SVOD, AVOD,
FASTS, OTA, PVOD....

For TV consumers, this collection
of acronyms means one thing:
more sources of TV content than
ever. And this year sees the
biggest jump in the number of
sources since we've been
measuring them.

Avg. number of TV sources per viewer*



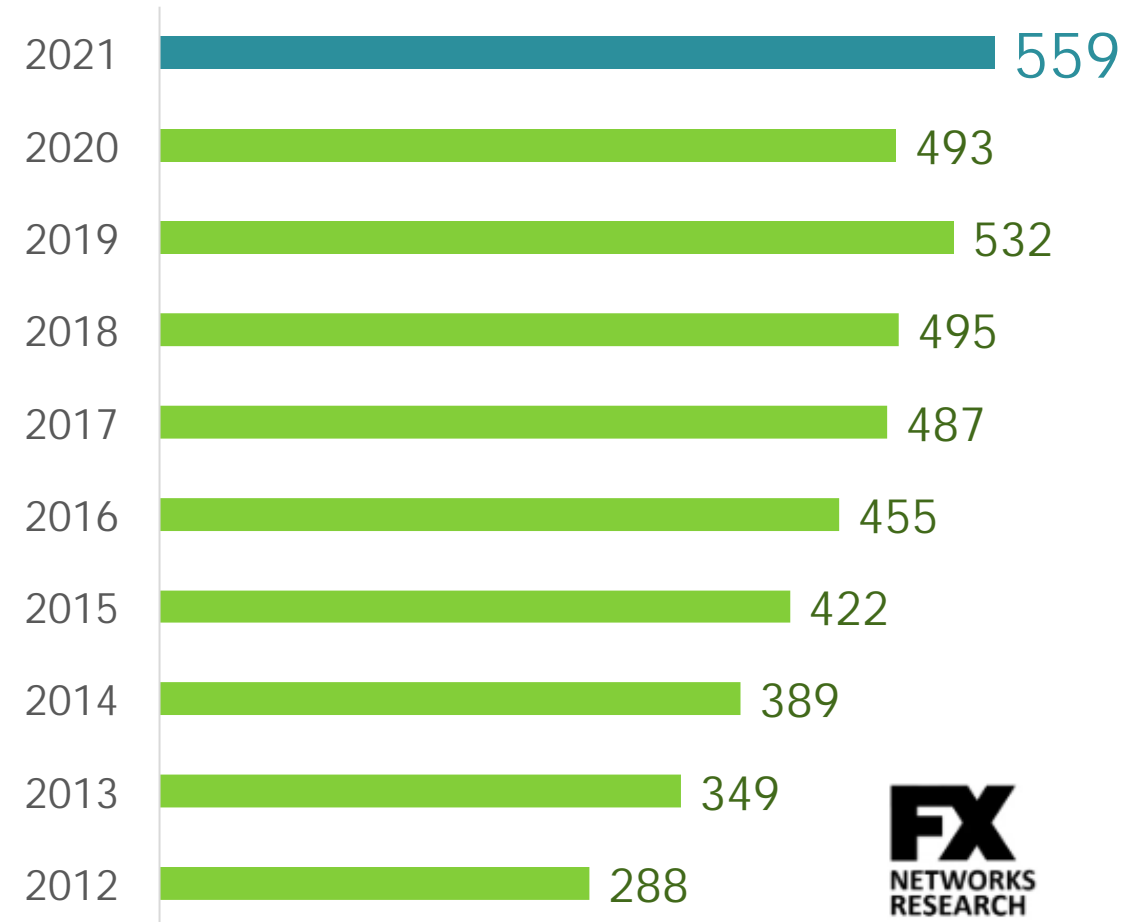
Note: calculation includes MVPD, VMVPD, SVOD, DTC,
AVOD, FASTs, OTA and transactional



The pandemic slowed TV production in 2020, but new shows came back with a vengeance in 2021.

The number of shows introduced each year is heading toward 600—and that's just scripted TV.

Number of Scripted TV Shows By Year, Across Sources





At the same time, there are signs that the days of virtually unlimited content spending may be coming to an end.

"If we did another 400 hours of content, maybe audiences would be a little happier, but we would make no money.... Would HBO be doing a lot better if it had three more really successful scripted series right now? It's not clear."

WB Discovery CEO David Zaslav, February 2022



In this study you'll learn...

- How viewers discover new shows
- Why they engage with some and not others
- How the path to discovery differs by platform or provider





WE SURVEYED 1,602 TV CONSUMERS

- Age 16-74
- Watch at least one hour of TV per week
- Have broadband
- U.S. census balanced
- Data collection completed in October 2022





WHAT WE COVER IN THIS STUDY

ATTITUDES

About the expansion of TV content and the methods of discovering new shows

PATH TO VIEWING

How viewers heard about a recently discovered favorite show and the source they use to watch it

ORIGINALS

Which TV sources consumers feel offer the most, and least, original content

DRIVERS

How factors like the increased use of FASTs impact use of streaming services

BRAND

The role that network and streaming brands play in consumers' viewing decisions



menu

1

KEY FINDINGS

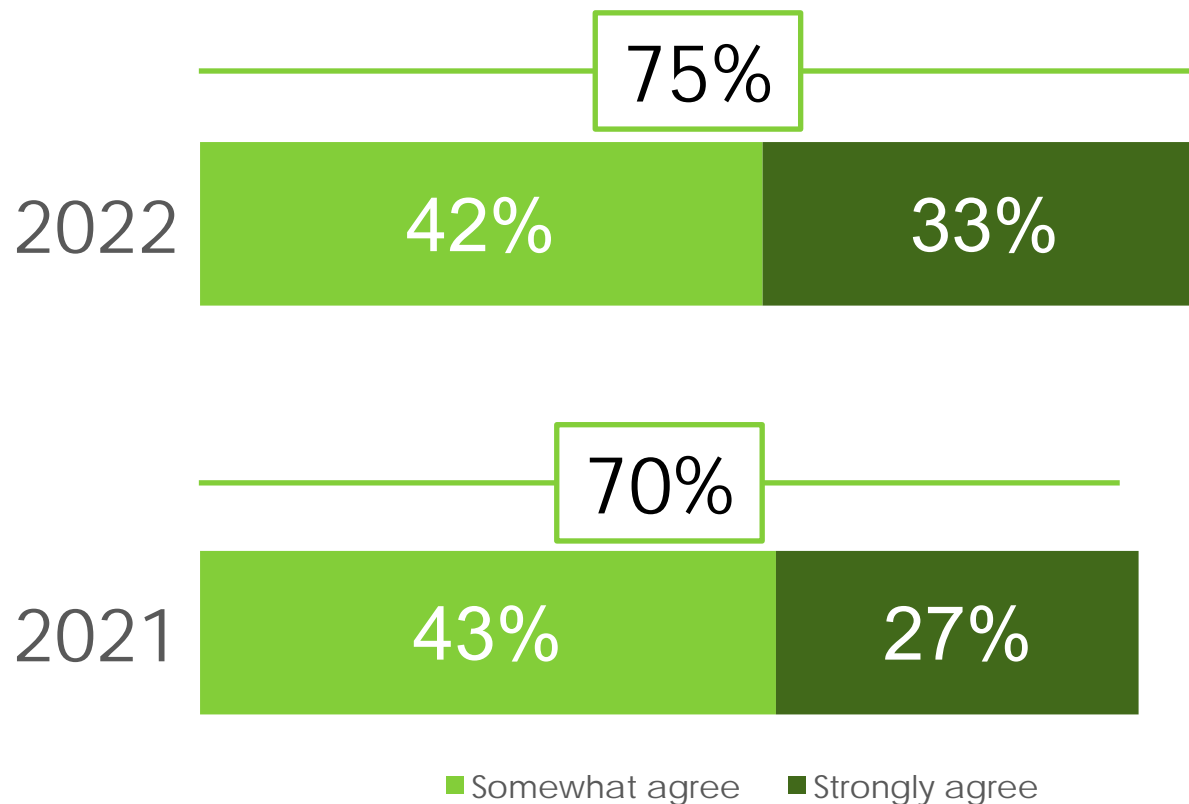
OK

PEAK TV MAKES TV A MORE COMPELLING FORM OF ENTERTAINMENT



Three quarters say they spend more time watching shows they really like than they did in the past

"More of my total TV time now is spent watching shows I really like"

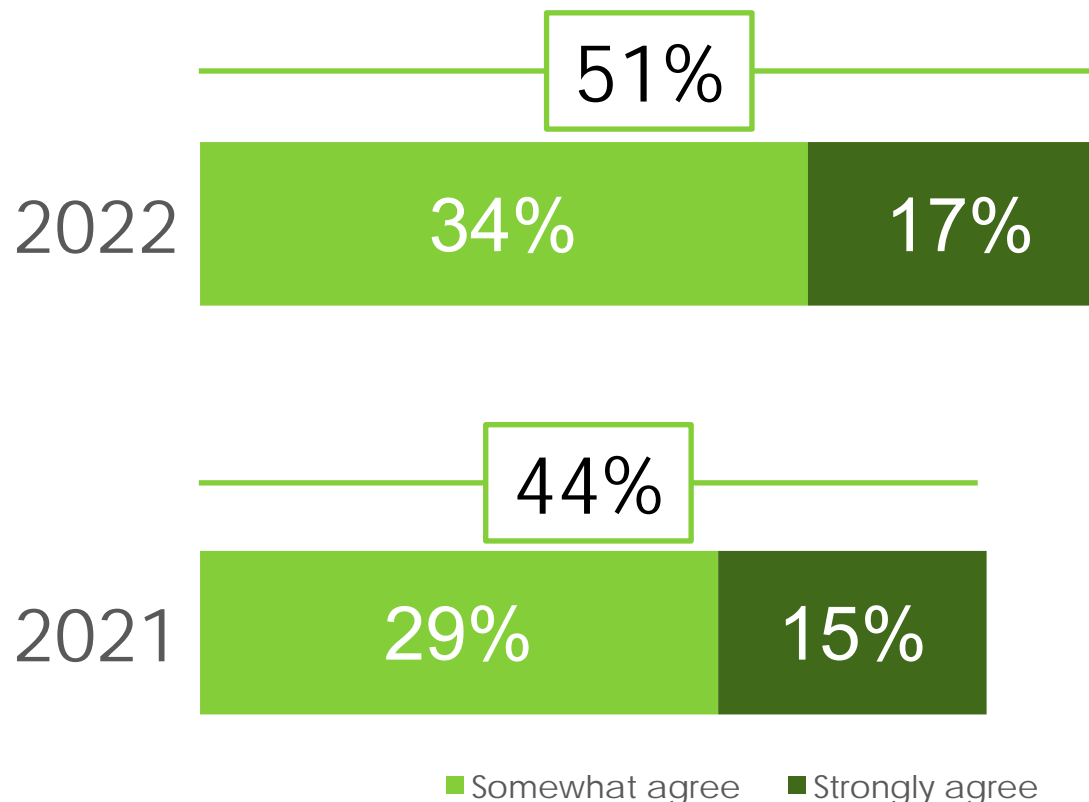


BUT IT ALSO MAKES DISCOVERY MORE OF A CHALLENGE



More than half say the volume of shows makes it hard to know where to begin

"There are so many shows to choose from it's hard to know where to start"

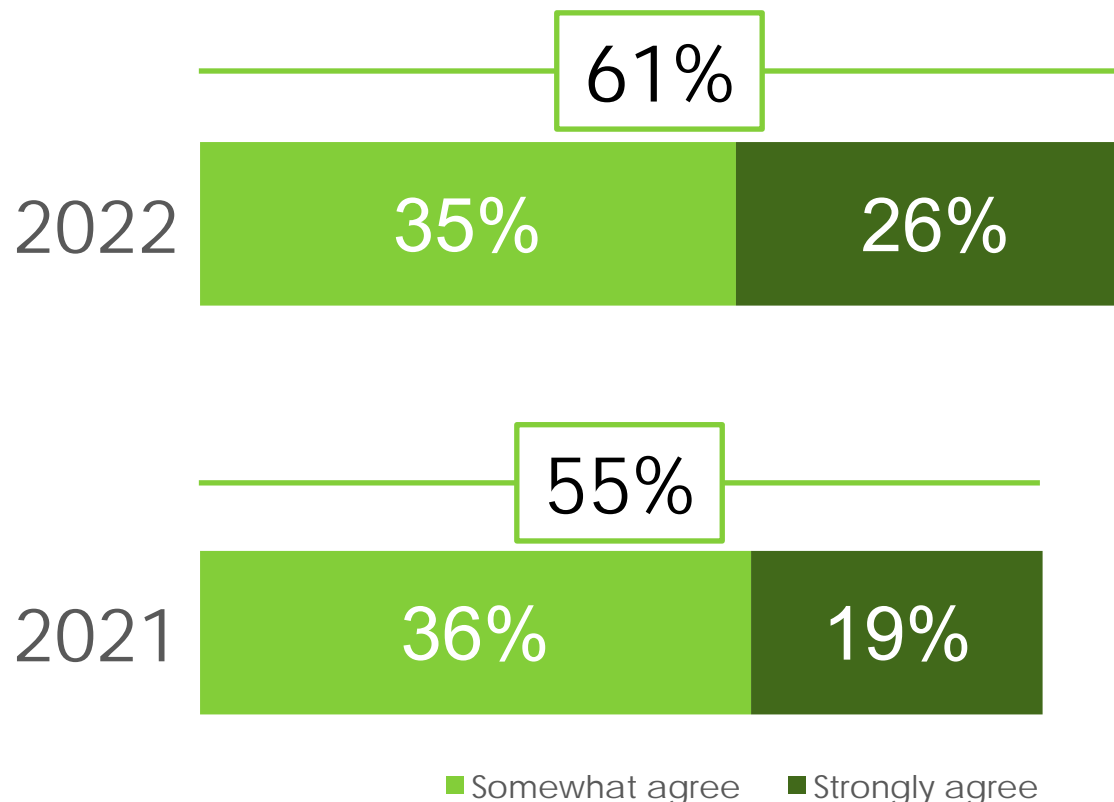


AS A RESULT, UNIVERSAL LISTINGS ARE BECOMING EVEN MORE IMPORTANT



61 percent say they need a universal listing to search all their platforms in one place

"I want a universal listing to find shows from any source, live TV or online"



BUT UNIVERSAL SEARCH IS UNDERPERFORMING



Those with universal search capability are only using it about 40% of the time

How do you find a show or movie when you don't know what service it's on?
- Among those who have access to universal search-



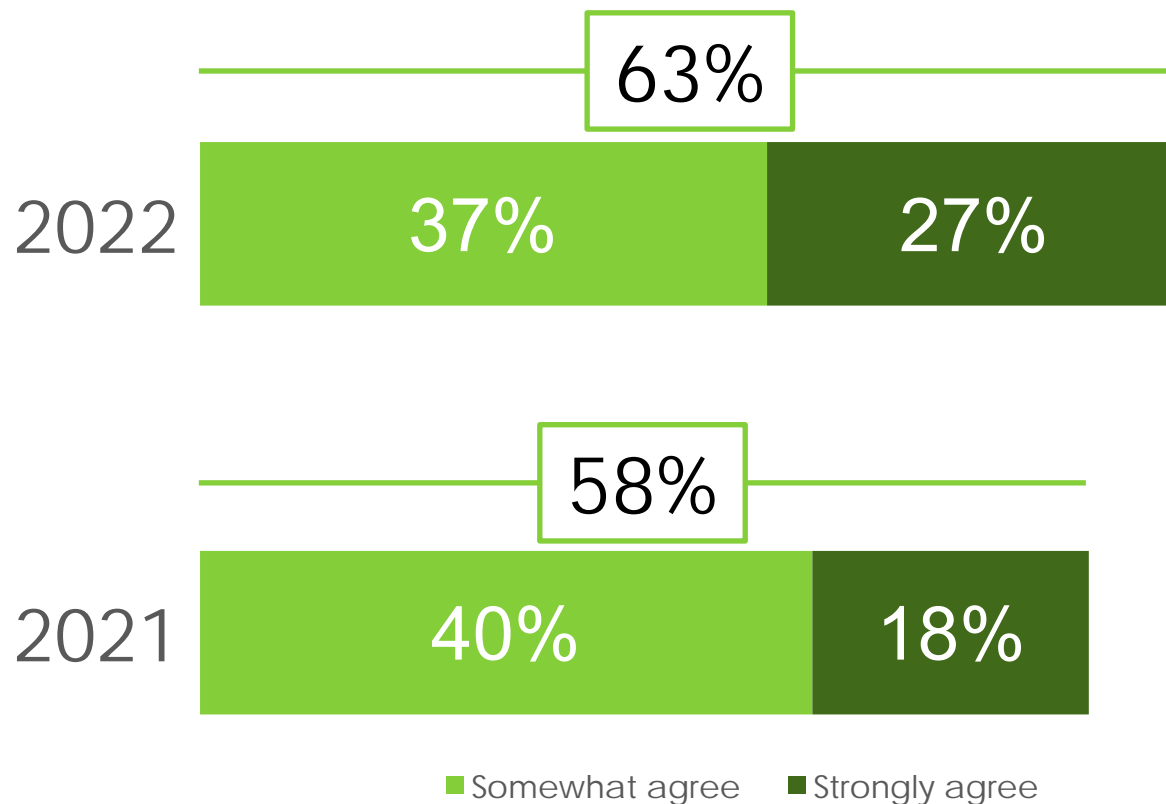
- Use universal search feature
- Search on service-by-service basis
- Some other method of searching

IN 2022, VIEWERS ARE HIGHLY LIKELY TO "KICK THE TIRES" BEFORE DECIDING WHAT TO WATCH



Almost two thirds are more likely to choose a show if they can watch a trailer first

"I'm more likely to try a new show if I can watch a trailer first"

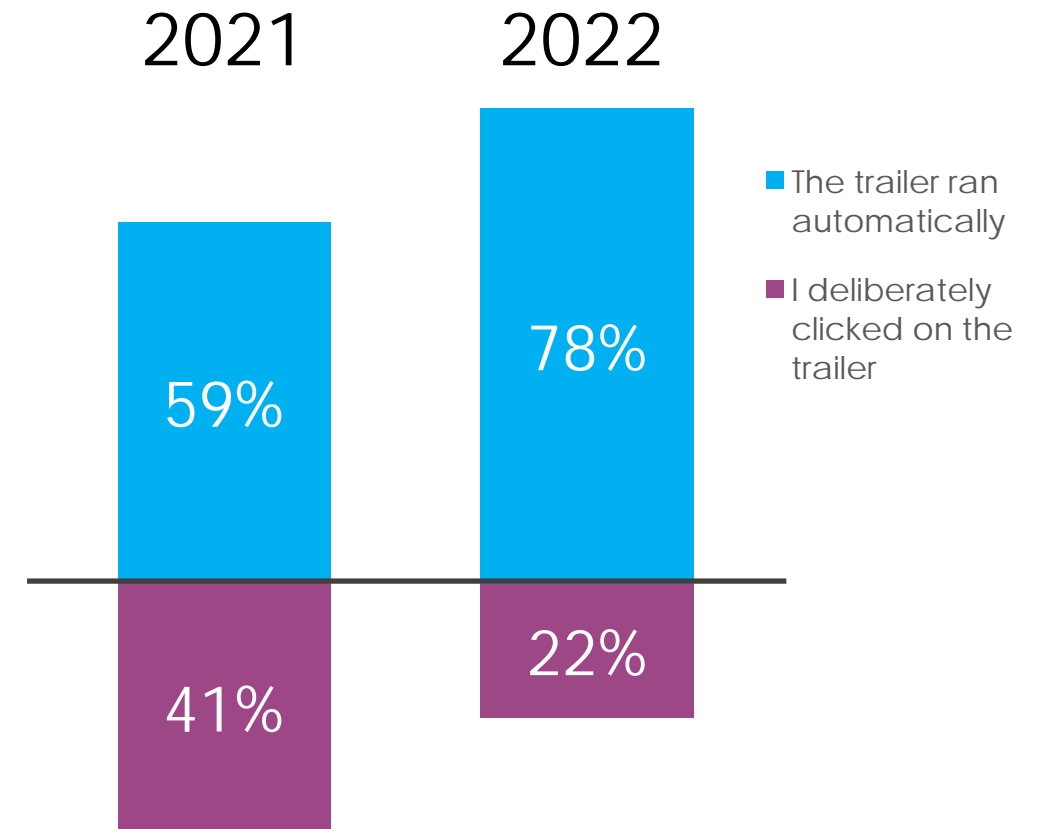


TRAILERS THAT RUN AUTOMATICALLY ARE AN EFFECTIVE WAY TO “CUT THROUGH THE CLUTTER”



$\frac{3}{4}$ of those who discovered a new favorite show via a trailer said the trailer they watched ran automatically – much higher than last year

How did you see the trailer for this show that became a favorite?
- Among those who discovered show from trailer -

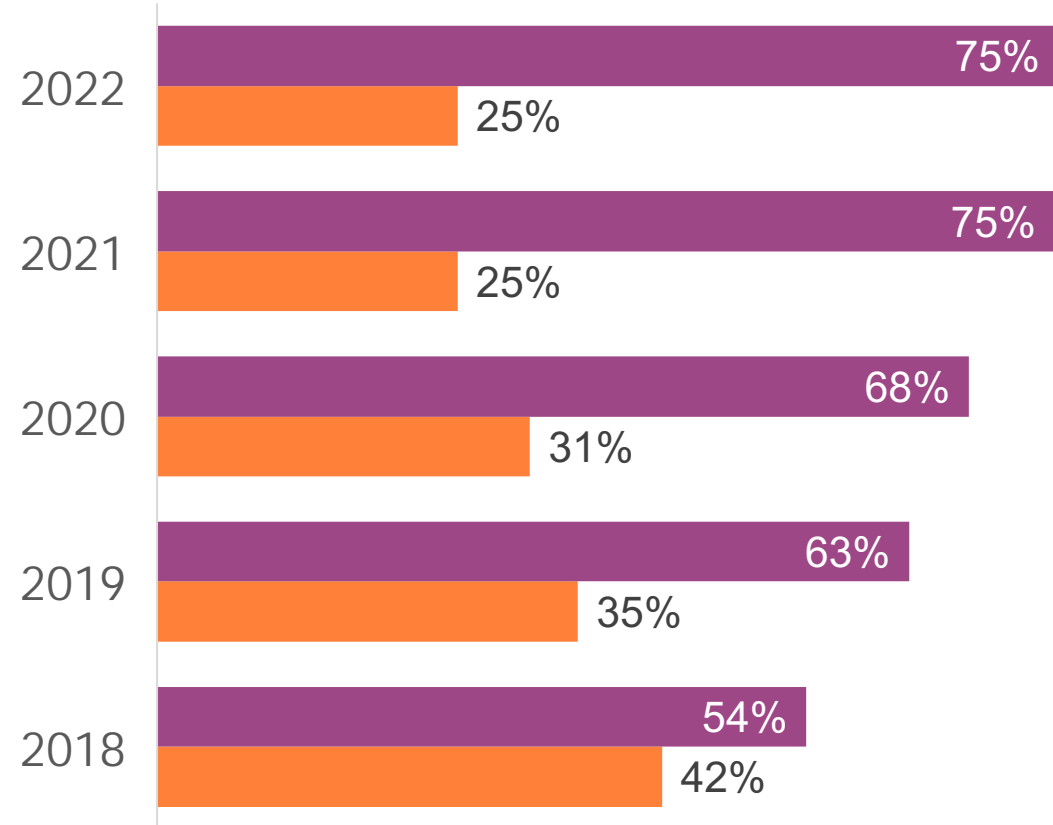


MOST VIEWERS STILL WATCH THEIR FAVORITE SHOWS ON STREAMING PLATFORMS...



...however, for the first time since we launched this study, its share over cable and broadcast did not grow

How do you watch that show?
- Among those who discovered new favorite show in past year -



NET: Any streaming platform

NET: "Traditional"
(Live, DVR, VOD, or Antenna)

ONE LIKELY REASON: VIEWERS FOLLOW SHOWS MORE THAN THEY FOLLOW PLATFORMS



This year, new episodes of many of the most popular shows **were on live TV** before (or at least at the same time) as they were available to stream

Tell us a new show you've discovered in the past year that's become a favorite
Top 10 most mentioned shows

- | | | | |
|----|---|-----|---|
| 1. |  | 6. |  |
| 2. |  | 7. |  |
| 3. |  | 8. |  |
| 4. |  | 9. |  |
| 5. |  | 10. |  |

A hand is raised in the air, palm facing forward, with fingers slightly spread. The hand is wearing a watch with a dark, textured strap. The background is a blurred crowd of people at night, with warm, out-of-focus lights creating a bokeh effect. The overall tone is dark and atmospheric.

QUESTIONS?

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