



EVOLUTION OF VIDEO BRANDING

How branding of networks, providers, and shows impacts what viewers choose to watch

FEB
2023



hub**10**^{YEARS}
ENTERTAINMENT RESEARCH

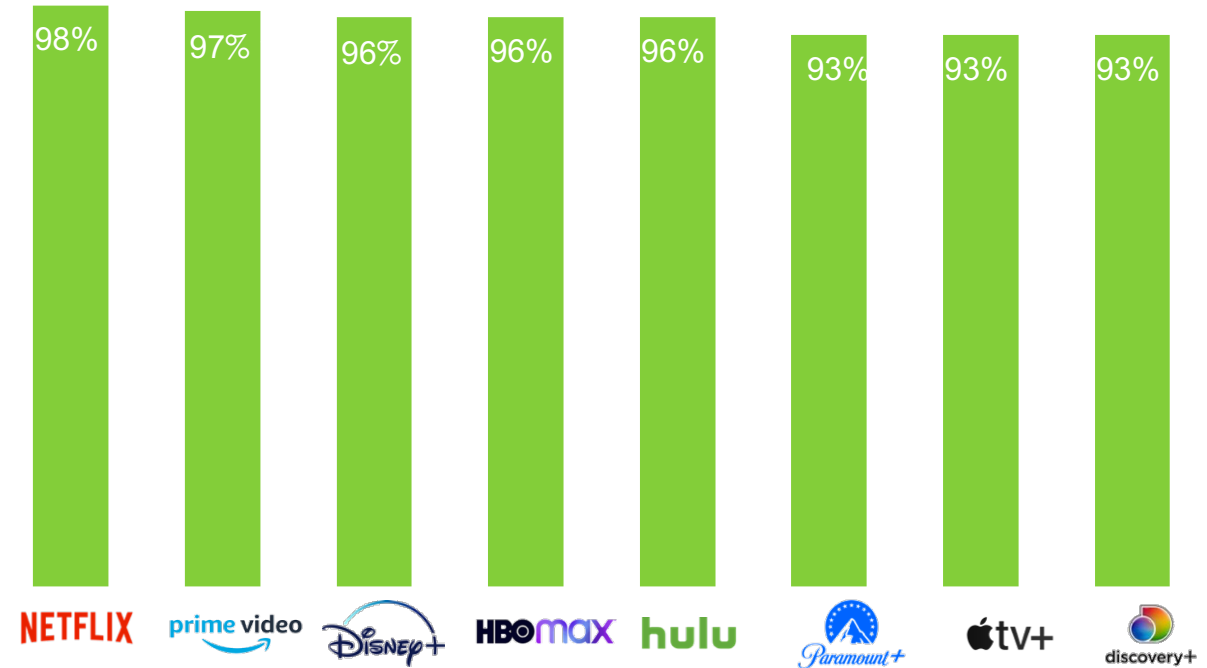
EXCERPT OF FINDINGS

THE HUGE MARKETING INVESTMENTS MADE DURING THE STREAMING WARS HAVE WORKED (AT LEAST PARTLY)



Awareness of all the major streamers (even the relatively new ones) is high – no small feat with such a crowded ecosystem

Awareness vs. Understanding*:
% who have heard of each



* Full list of brands appears later in the report

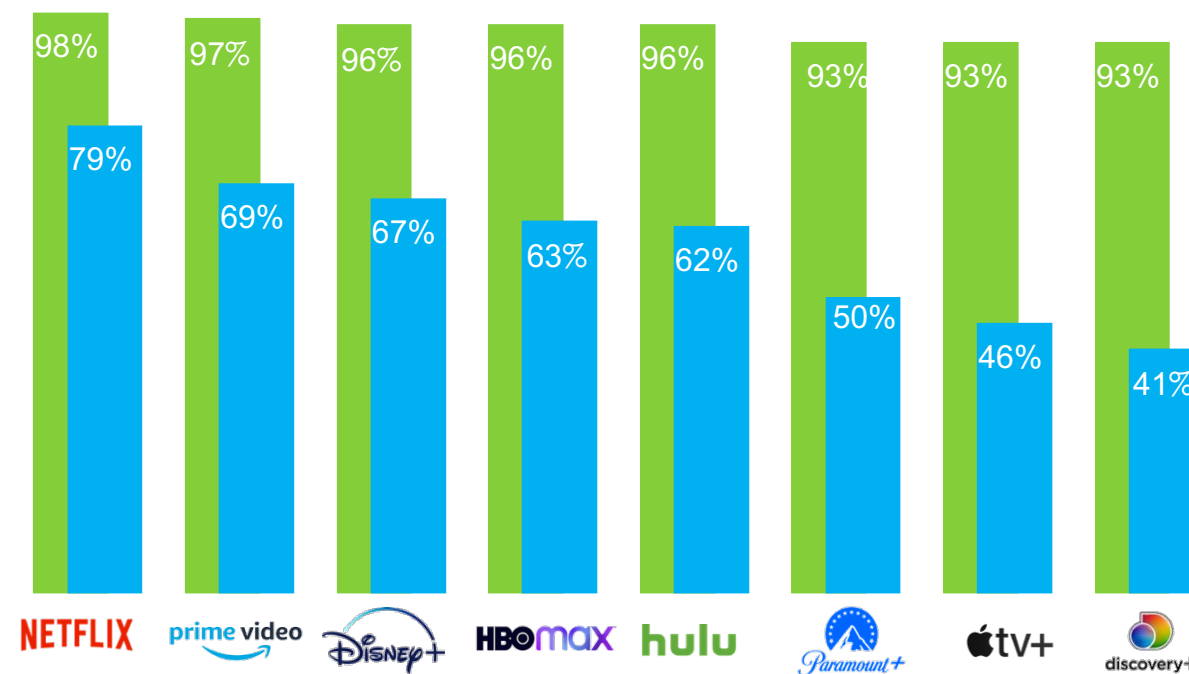
■ % aware

BUT BRANDS HAVE BEEN FAR LESS SUCCESSFUL COMMUNICATING WHAT MAKES THEM DIFFERENT



Awareness vs. Understanding*:
% who have heard of each, vs.
% confident could explain to someone else

Far fewer consumers
feel confident they
understand how one
platform is different
from the alternatives



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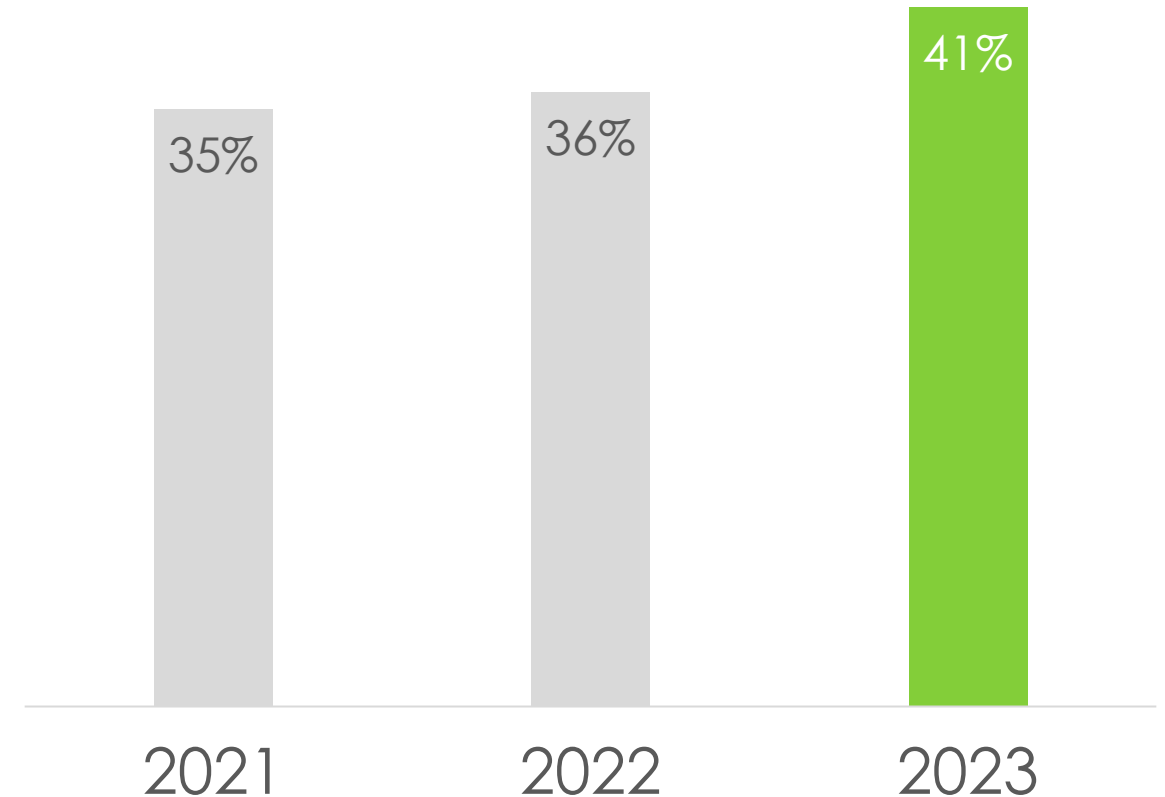
■ % aware ■ % confident

MORE THAN FORTY PERCENT SAY THEY'VE SIGNED UP FOR A SERVICE IN ORDER TO WATCH A SPECIFIC SHOW



In the past year have you signed up for a service to watch a specific show?

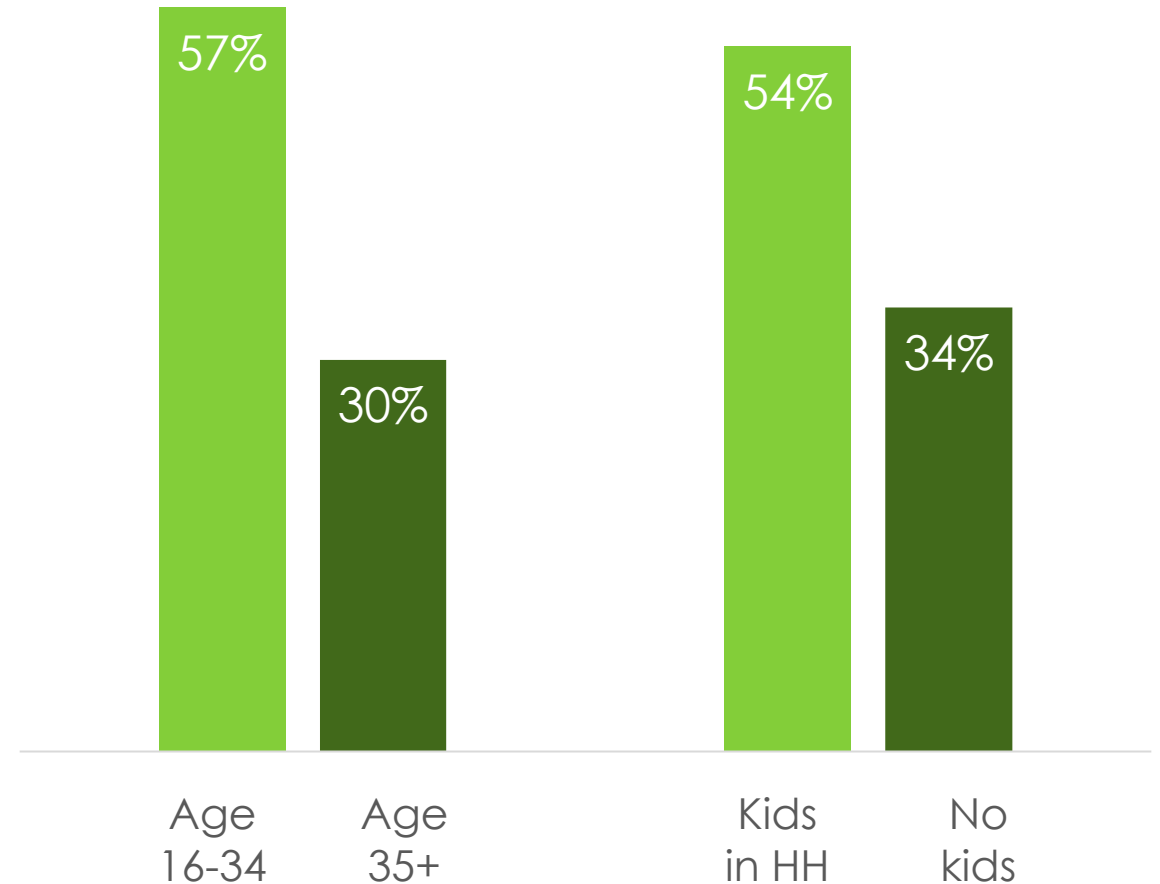
With so many platforms,
and an imperfect
understanding of how
they're different from
one another, exclusive
content is often the
deciding factor



SOME SEGMENTS ARE ESPECIALLY LIKELY TO CHOOSE PLATFORMS BASED ON A PARTICULAR SHOW

Younger viewers and those with kids at home are much more likely to sign up for a platform to watch a particular show

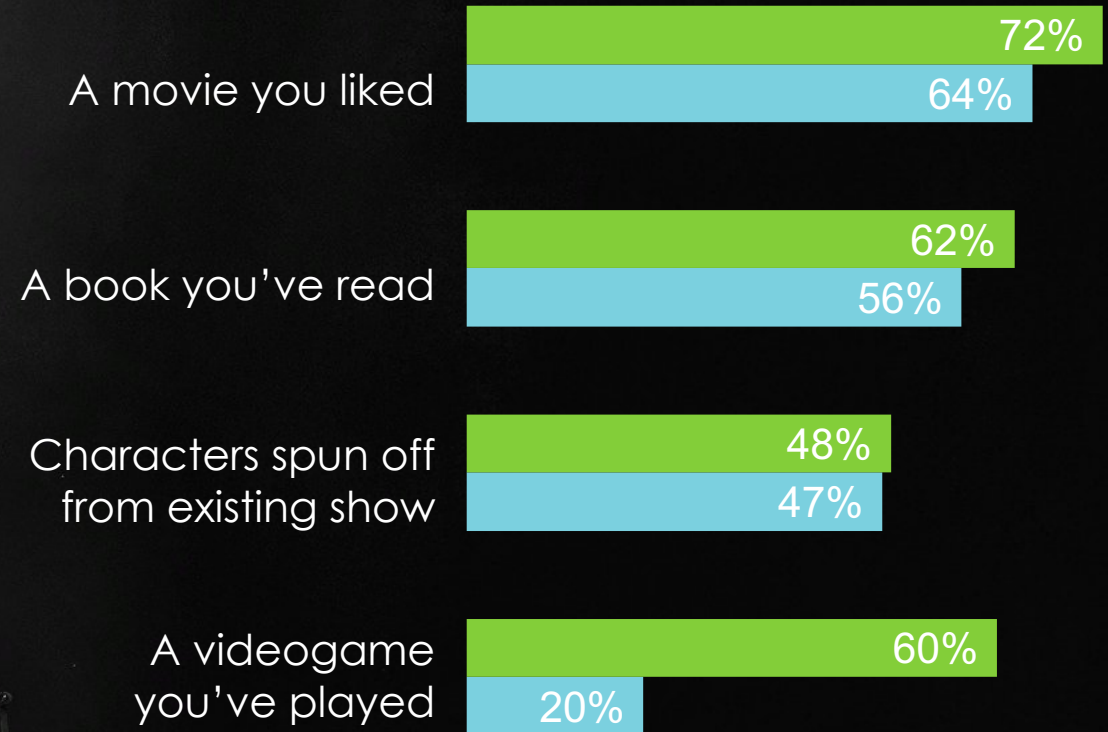
In the past year have you signed up for a service to watch a specific show?



IP TAKEN FROM OTHER CATEGORIES IS ALSO EFFECTIVE AT DRIVING INTEREST IN NEW SHOWS

IP from books, movies and games are an effective way to brand and differentiate new shows

Would you be more likely to watch a new show based on...
% more likely to watch



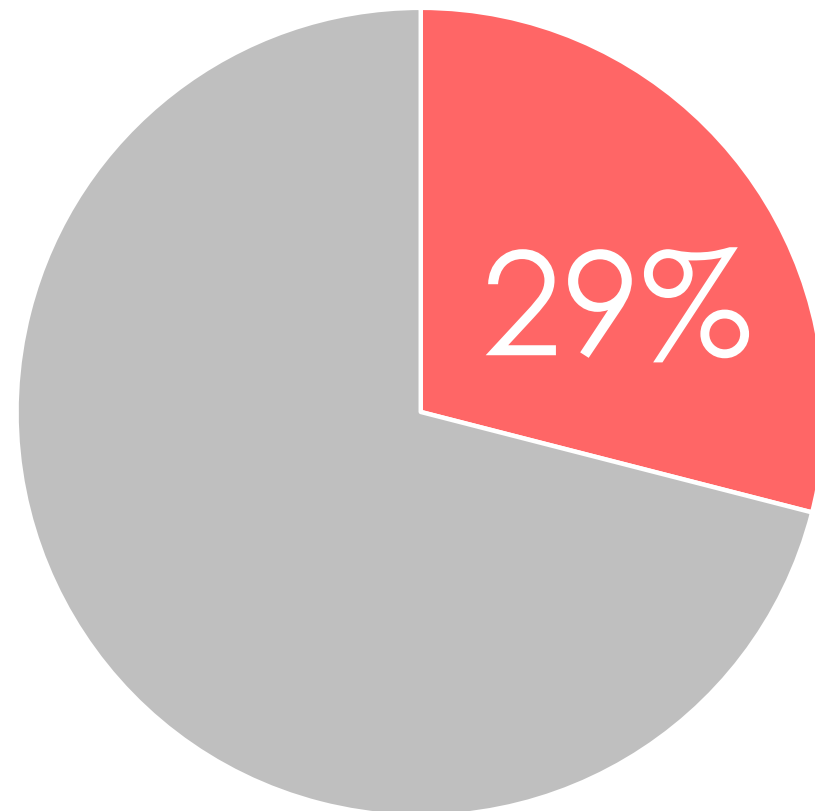
■ Age 16-24 ■ Age 35+

ONE SUCCESSFUL PIECE OF IP CAN FORM A DISCOVERY “CHAIN” THAT GENERATES NEW VIEWERS, AND ALSO KEEPS THEM



Have you watched “Yellowstone,” the modern Western starring Kevin Costner?

For instance: almost a third of all respondents say they have watched “Yellowstone”...

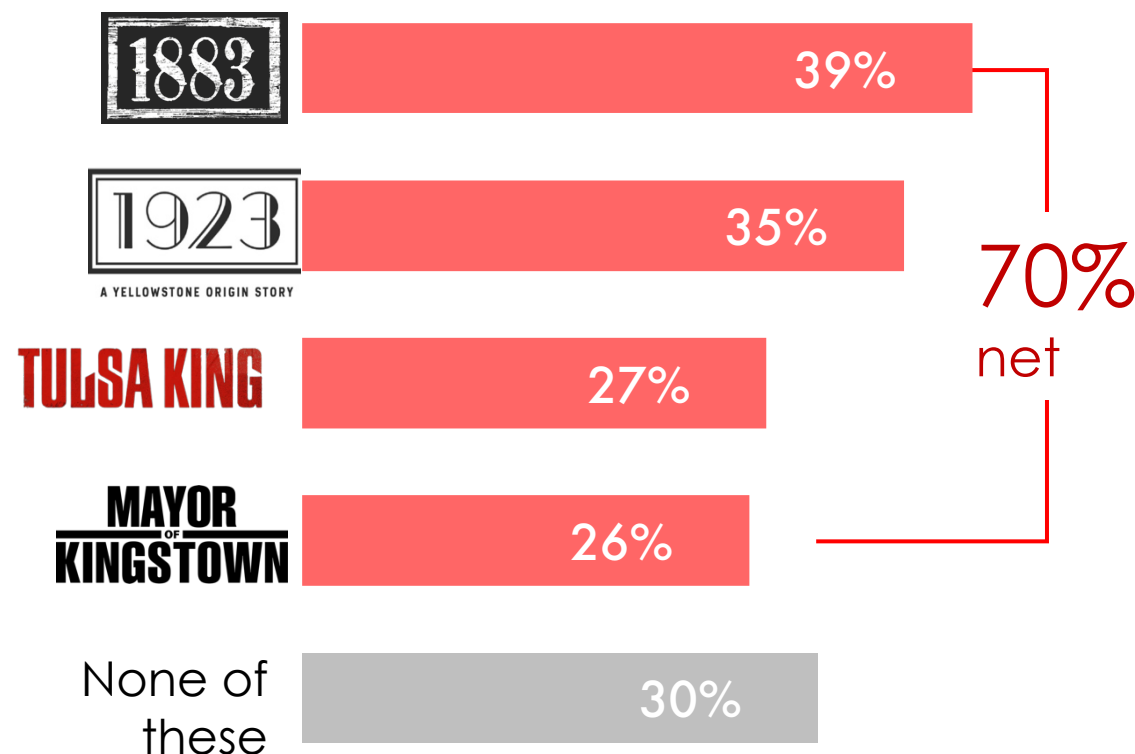


SUCCESSFUL IP CREATES A DISCOVERY “CHAIN” THAT GENERATES NEW VIEWERS, EVEN ACROSS PLATFORMS



...and among those who have, 70% have watched one of the subsequent shows in the Taylor Sheridan “universe” – even though they’re all on Paramount +, and Yellowstone is not

Have you watched at least one episode of any of the following TV series?





QUESTIONS?

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