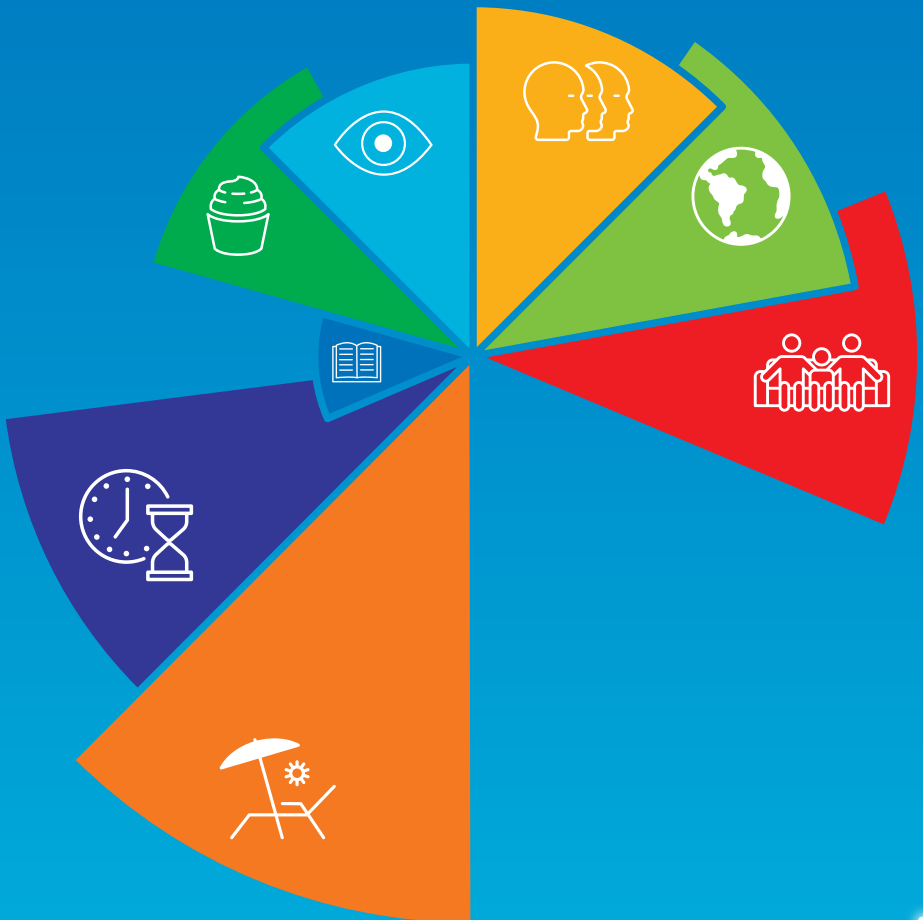
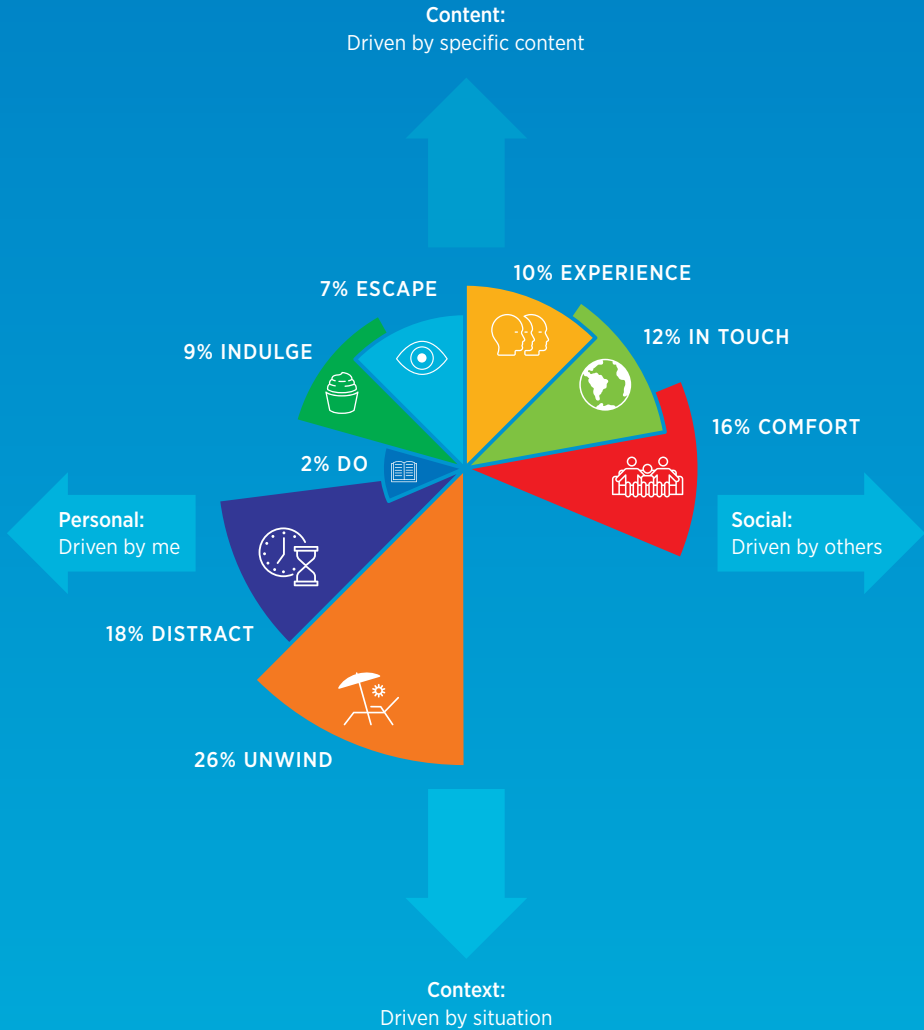


THINKBOX

# THE AGE OF TELEVISION

NEED STATE SUMMARY







## The study

‘The Age of Television’ was conducted by research and strategy consultancy MTM, commissioned by Thinkbox

Its findings are based on qualitative analysis of 150 days of TV and video viewing filmed through camera glasses worn by 30 people, alongside a quantitative study of 6,000 people.

It explains the different reasons why people watch live TV, broadcaster on-demand TV, and subscription services like Netflix. It has also revealed why people use online video platforms like YouTube.

### **The 8 reasons we watch**

There are 8 different ‘need states’ which people watch TV and video to satisfy.

This booklet provides some top-line detail across these need states; what’s the driving context behind them; to what degree do different types of video satisfy these needs and what genres are most commonly chosen.

### **Key headlines**

- We watch different types of TV to fulfil our different viewing need states and broadcaster TV remains the most popular for all but one of these needs.
- Live TV excels at helping us stay in touch with the world and our desire to share viewing experiences with others.
- Online video like YouTube is popular for distraction and our more practical needs.
- Subscription VOD services such as Netflix are good at offering additional ways to escape through content like high end drama.

For more detail on The Age of Television research please visit [thinkbox.tv](http://thinkbox.tv).



# Unwind

26% of all viewing time

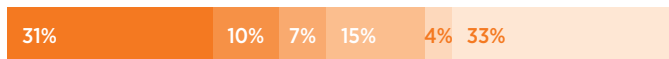
The need to relax and de-stress from the pressures of the day, through familiar and undemanding content

## Breakdown by video type:

All adults



16-34s



- Live TV
- Playback TV
- Broadcaster VOD
- Subscription VOD
- DVD
- Online Video

- Viewers are often tired, don't want to think too much and are looking for light-hearted content
- Content needs to be familiar and easy to watch
- Linear TV's EPG often first destination
- Low effort need state; playback TV, broadcaster VOD and subscription VOD tend to be secondary destinations for content
- In some contexts, online video is first destination for younger audiences (e.g. when in bed)

## Key features:



Live TV



Solo Viewing



Evenings



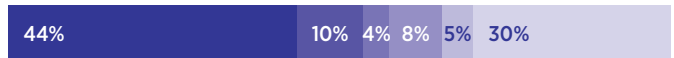
# Distract

18% of all viewing time

The need for instant gratification to fill time, counter boredom or provide a short break from other tasks

## Breakdown by video type:

All adults



16-34s



■ Live TV

■ Playback TV

■ Broadcaster VOD

■ Subscription VOD

■ DVD

■ Online Video

- Viewers may be taking a break or filling time
- Instant gratification either through entertainment or information
- Often looking to lighten mood and put a smile on face
- Choice of platform influenced by context and time
- Short-form online video content covering a wide range of interests – such as music, TV clips, gaming, comedy

## Key features:



Younger Profile



Online Video



Device



# Comfort

16% of all viewing time

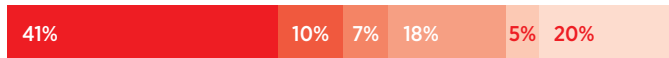
The need for shared family / couple time, which tends to be served by familiar programmes and viewing routines

## Breakdown by video type:

All adults



16-34s



- Live TV
- Playback TV
- Broadcaster VOD
- Subscription VOD
- DVD
- Online Video

- Viewers are relaxed and sociable
- The choice of content is sometimes a compromise and secondary to the household's desire to be able to watch something together
- Often served by familiar programmes which can cater to everyone
- Linear TV's EPG is often the first port of call - most easy to navigate
- Broadcaster VOD is the second destination for missed episodes or content selection

## Key features:



Live TV



Shared Viewing



TV Set



## In Touch

12% of all viewing time

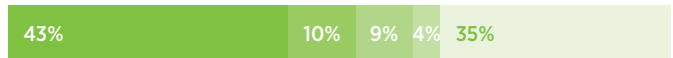
The need to feel aware of what's happening in the world, by being informed about political, social and cultural events

### Breakdown by video type:

All adults



16-34s



■ Live TV

■ Playback TV

■ Broadcaster VOD

■ Subscription VOD

■ DVD

■ Online Video

- For TV, viewers are engaged, interested and want to be informed
- Live TV is important for news and current affairs
- For online video, viewers can actively seek out news/current affairs or watch content which appears while scrolling
- Younger audiences find documentaries on-demand (often after checking the linear TV EPG)
- Content is thought-provoking and taps into current issues in an accessible way

### Key features:



Live TV



Older profile



Mornings



# Experience

10% of all viewing time

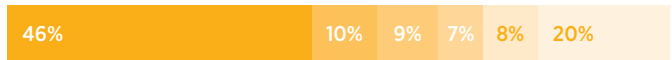
The need to feel part of a shared viewing experience, either by watching live or being able to participate in a wider social conversation

## Breakdown by video type:

All adults



16-34s



- Live TV
- Playback TV
- Broadcaster VOD
- Subscription VOD
- DVD
- Online Video

- Desire to be part of a shared experience
- Not missing out is a key motivation for viewing
- Content has high production values and high profile talent
- Live TV is first choice for certain shared experiences e.g. biggest dramas, sport
- Creates talkability
- Appeals across age and gender

## Key features:



Live TV



TV Set



Evenings





# Indulge

9% of all viewing time

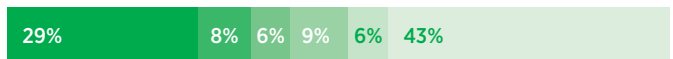
The need to pursue personal interests, hobbies and fulfil guilty pleasures

### Breakdown by video type:

All adults



16-34s



- Live TV
- Playback TV
- Broadcaster VOD
- Subscription VOD
- DVD
- Online Video

- Viewers are active, engaged and relaxed
- Moment is viewed as 'my time'
- Fulfils a personal viewing need
- Content choice varies by context, age-group and interests of viewer
- Content is long form in addition to short online video covering a huge range of topics
- Niche documentaries and UK/US reality series are popular

### Key features:



Younger Profile



Online Video



Solo Viewing



# Escape

7% of all viewing time

The need to lose yourself in another world and become fully immersed in highly involving and engaging content

### Breakdown by video type:

All adults



16-34s



- Live TV
- Playback TV
- Broadcaster VOD
- Subscription VOD
- DVD
- Online Video

- Viewers looking to 'lose themselves' in the content
- Content has high production values, high profile talent and engaging or complex storylines
- Platform choice is driven by where the content is available to view
- Volume of content and flexibility of viewing are important (e.g. box sets)
- Can be British or American content

### Key features:



Evenings



Drama



On Demand Viewing



# Do

## 2% of all viewing time

The need to find useful information that can be practically applied to any area of life

### Breakdown by video type:

All adults



16-34s



- Live TV
- Playback TV
- Broadcaster VOD
- Subscription VOD
- DVD
- Online Video

- Focussed and task / goal-orientated
- Often met through short-form video content
- Instructional / how-to videos
- YouTube is first destination for many
- Covers huge variety of everyday tasks and needs
- Production values and quality are not priorities

### Key features:



Online video



Device



How-to videos

## Want to hear more?

If you'd like more information about this research or how you can make the most of TV then get in touch; we can come and present key research and other TV related information to your business.

Contact [tom.minster@thinkbox.tv](mailto:tom.minster@thinkbox.tv) and he'll arrange for us to pop round.

[www.thinkbox.tv](http://www.thinkbox.tv)