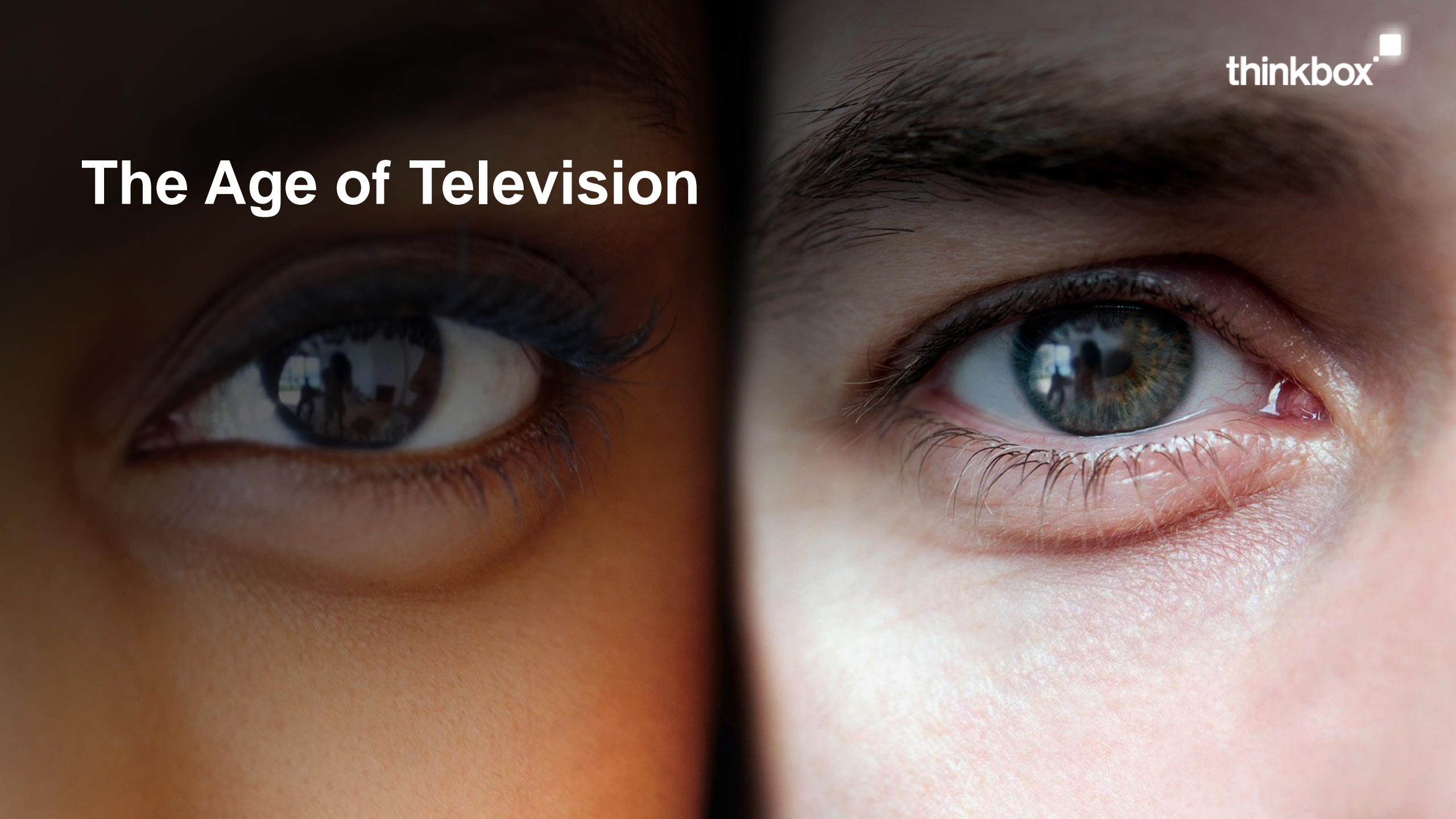
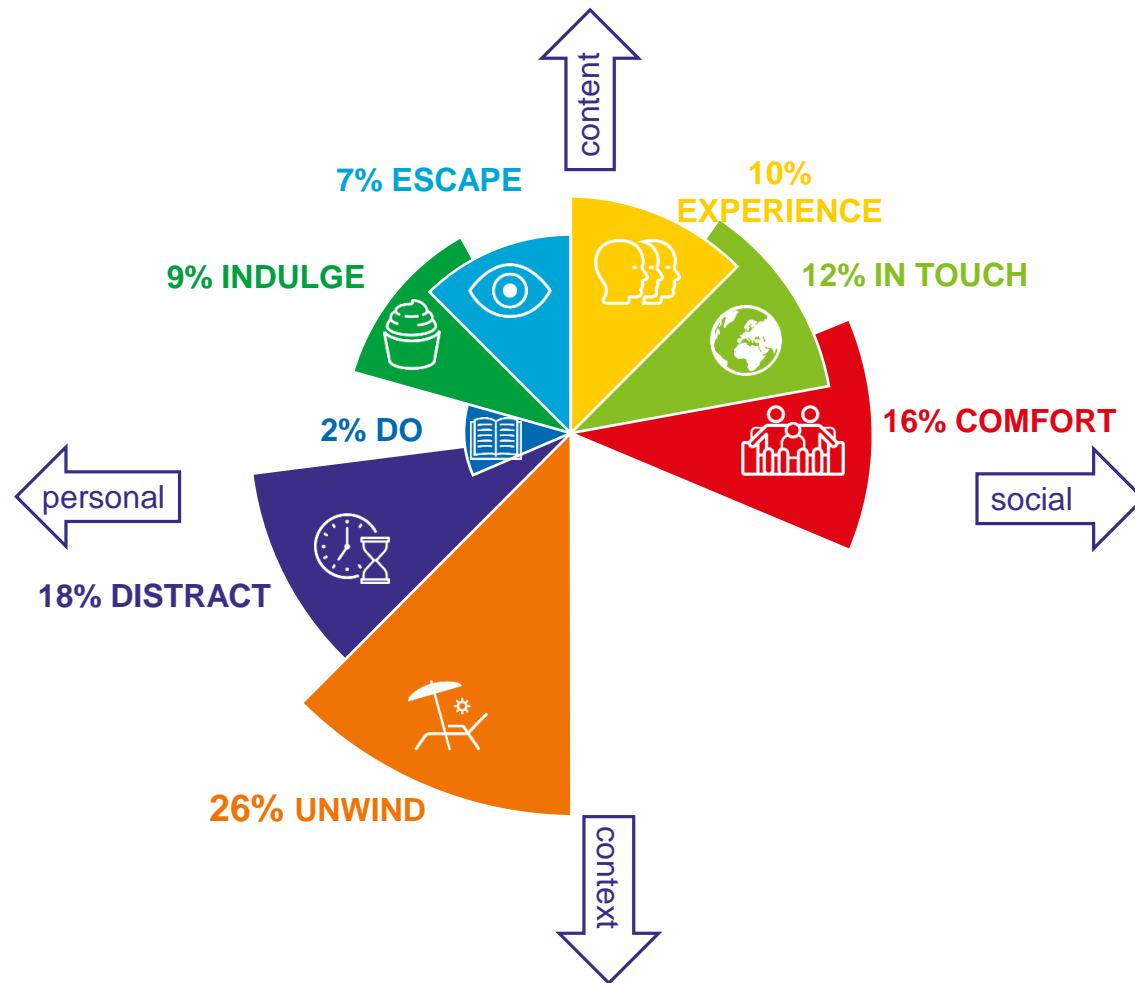


# The Age of Television



# There are 8 need states which drive video viewing



# The need states

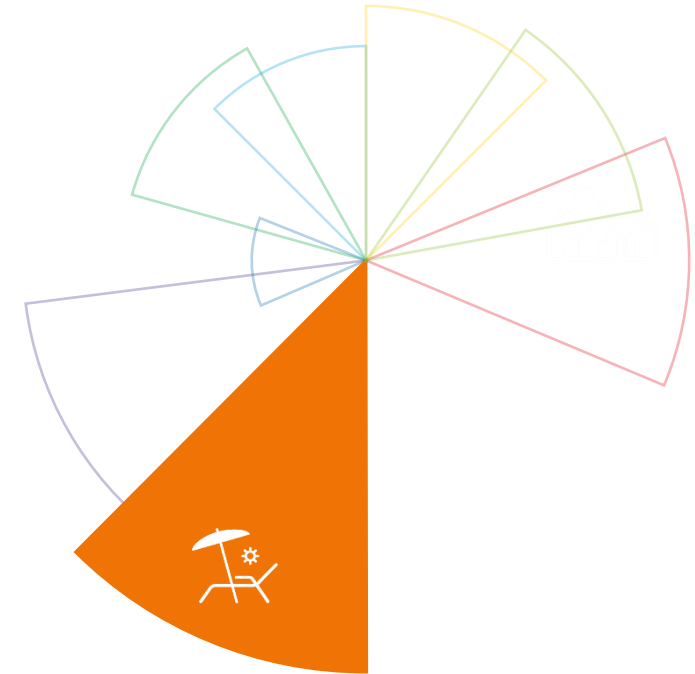


# Unwind

## 26% of viewing time

The need to relax and de-stress from the pressures of the day

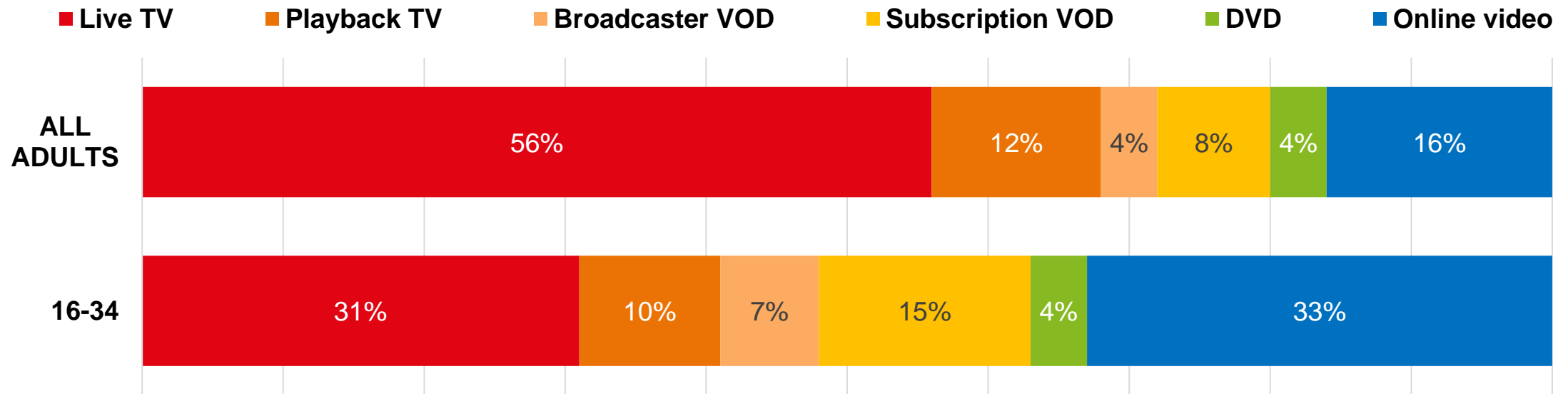
- Low effort need state
- Viewers are tired and don't want to think too much
- Content must be familiar and easy to watch
- Linear TV's EPG is often first destination



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (1,531)

# Unwind

## 26% of viewing time



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (1,531), 16-34 (430)

# Unwind

## 26% of viewing time

“ It’s a way of relaxing at the end of the day; it helps you switch off after a long day at work, to shift attention away from the day and start unwinding ”

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (1,531)



68% solo viewing

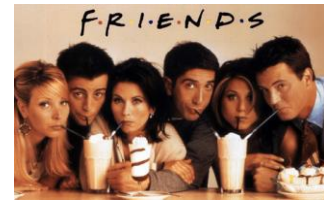


82% viewed on TV set



62% evening viewing

Served by light-hearted content:

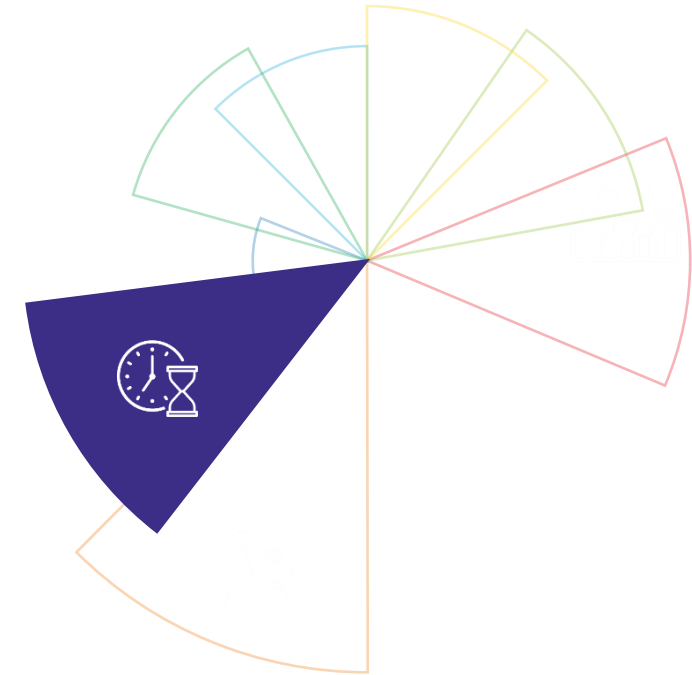


# Distract

## 18% of viewing time

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

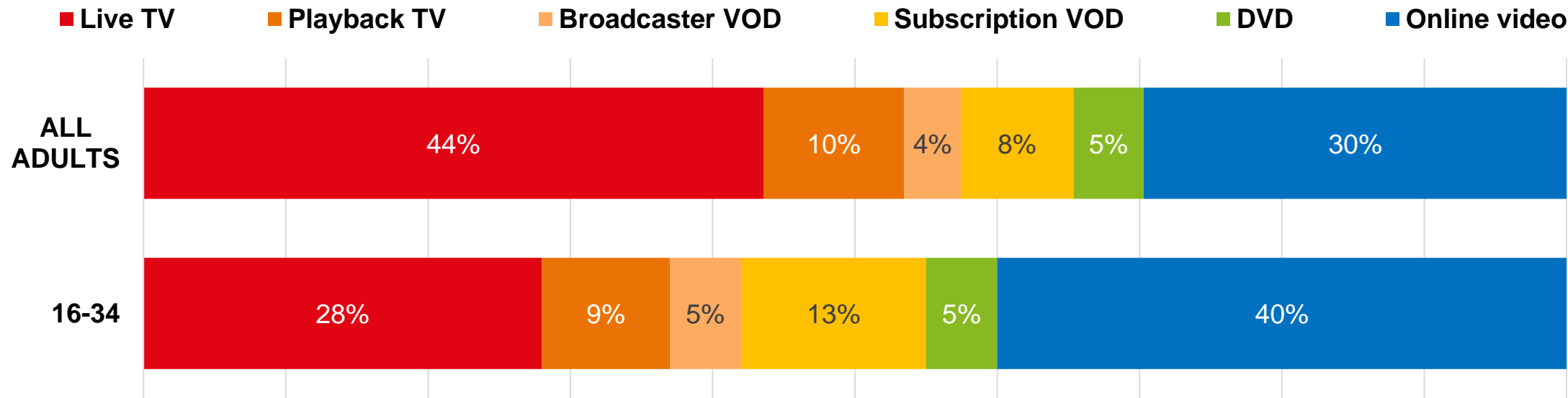
- Viewers are taking a break or filling time
- Looking to lighten mood/ put smile on face
- Platform choice influenced by context and time
- Short-form online video content covers a wide range of interests e.g. music, TV clips, gaming



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (1,150)

# Distract

## 18% of viewing time



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (1,150), 16-34 (503)

# Distract

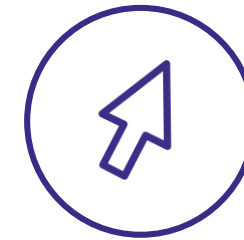
## 18% of viewing time

“ It’s low level entertainment, easy and quick. There’s less emotion than TV, it’s a short burst then you move on to the next one ”

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (1,150)



48% 16-34  
profile



30% online  
video



46% watched  
on device

Served by entertaining or informing content:



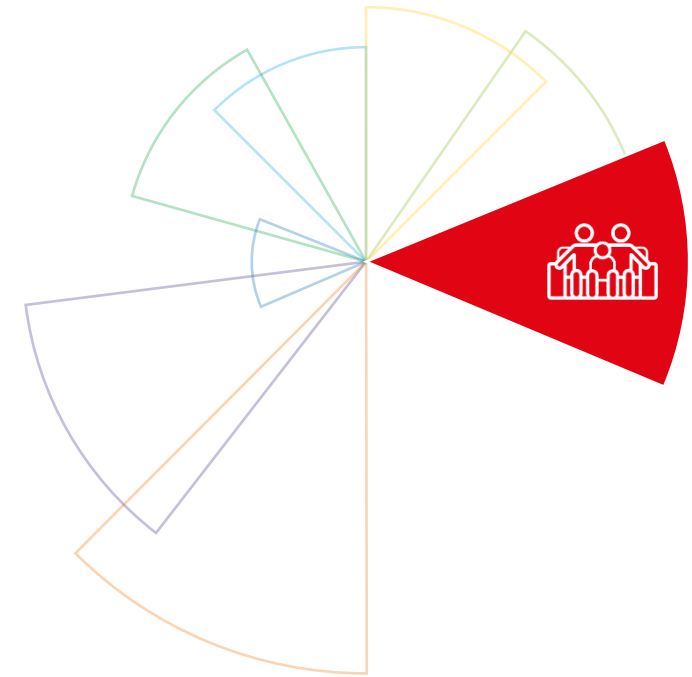
# Comfort

## 16% of viewing time

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### The need for shared family / couple time

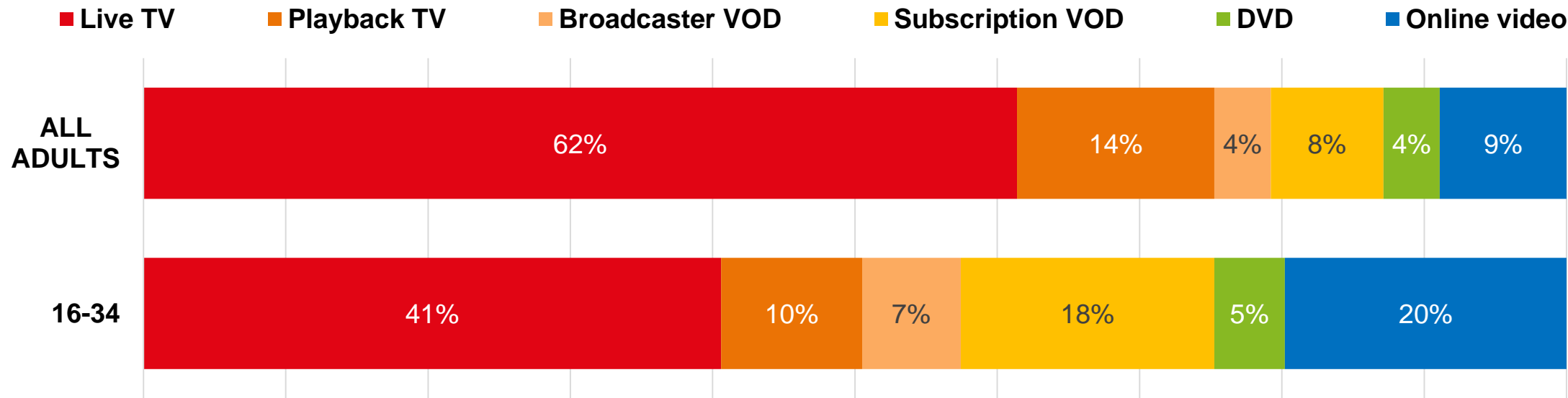
- Viewers are relaxed and sociable
- Priority is **watching together**
- **Familiar programmes** which can cater to everyone
- Linear **TV's EPG** is often the first port of call – most easy to navigate
- **Broadcaster VOD** is the second destination for missed episodes or content selection



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (831)

# Comfort

## 16% of viewing time



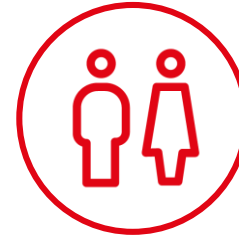
Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (831), 16-34 (279)

# Comfort

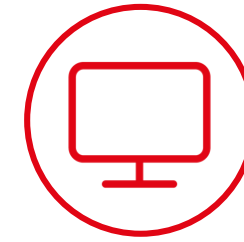
## 16% of viewing time

“ I do really enjoy the family time where we're watching together and having conversations and it's just our family time. That's what I enjoy most about it, our time together ”

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (831)



97% shared viewing



92% viewed on TV set



68% evening viewing

Served by familiar programmes:



# In Touch

## 12% of viewing time

### The need to feel aware of what's happening in the world

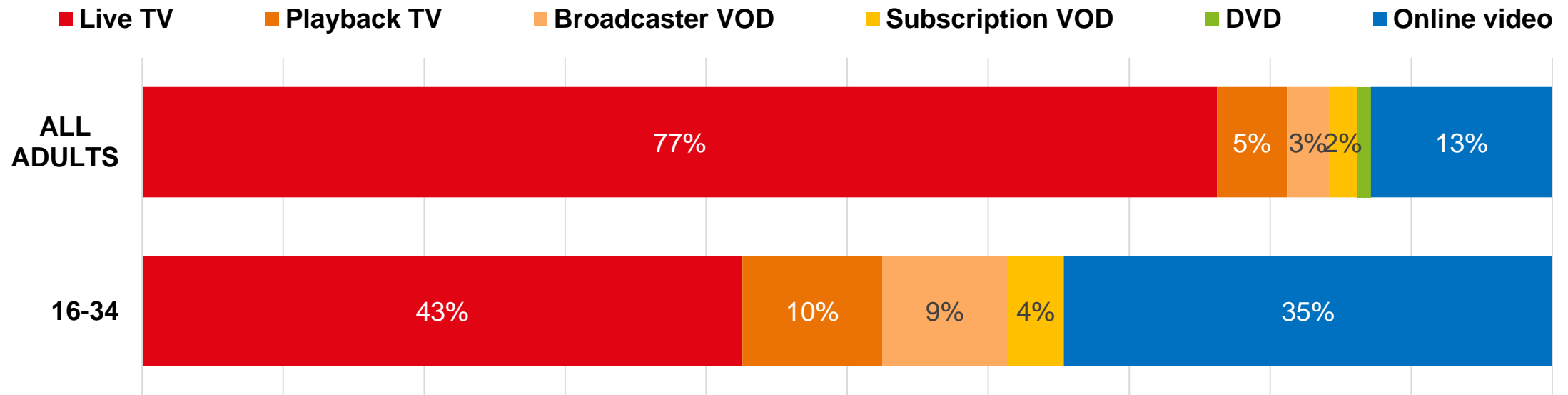
- Viewers **informed** about **political, social and cultural events**
- **Live TV** is important for **news and current affairs**
- For online video, viewers can actively seek out news/current affairs or watch content which appears while scrolling
- Younger audiences find **documentaries** on-demand

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (641)



# In Touch

## 12% of viewing time



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (641), 16-34 (151)

# In Touch

## 12% of viewing time

“ I think I’m interested in a lot of things; I always want to know and a lot of that knowledge is gained from watching TV. I think it’s a great of way of learning about things; travel, politics, whatever it might be ”

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (641)



64% 45+  
profile

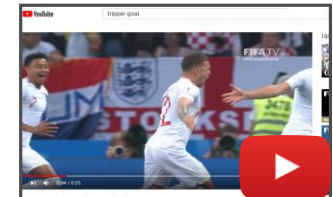
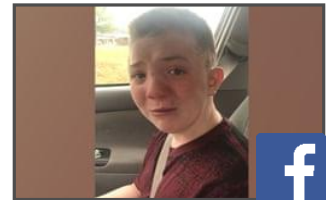


77% live TV



31% morning  
viewing

Served by thought-provoking content:



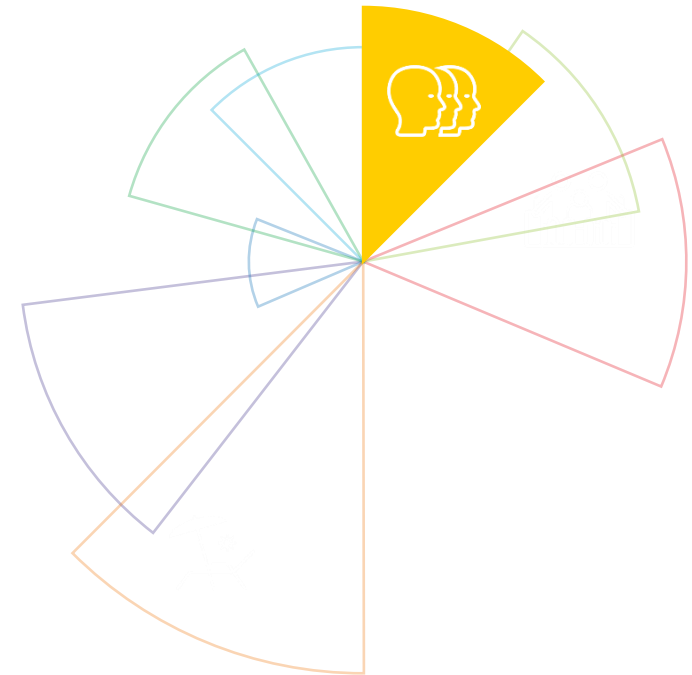
# Experience

## 10% of 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

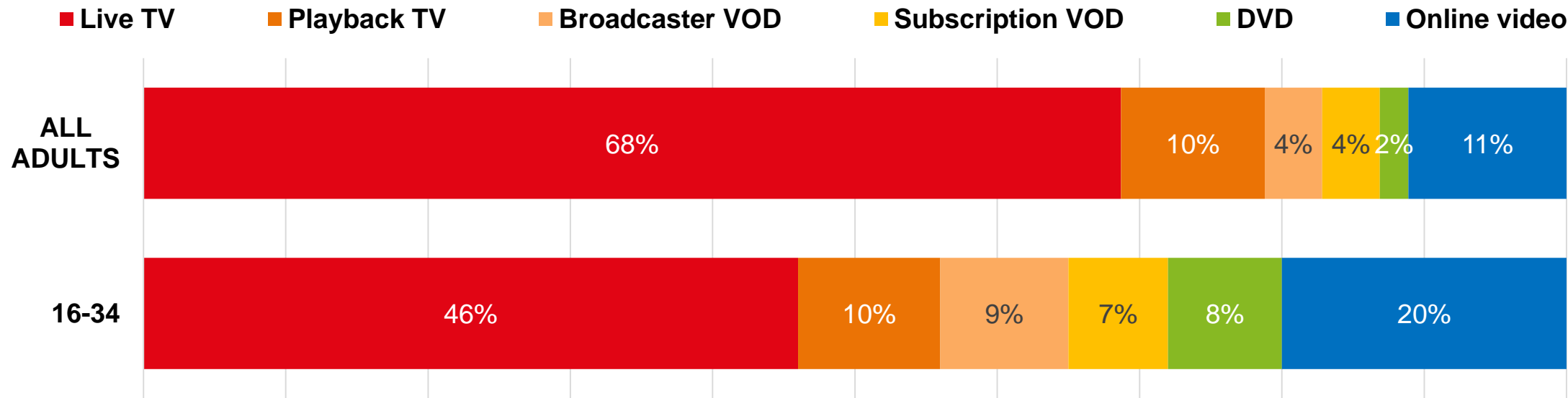
- Desire to be part of a **shared experience**
- **Not missing out** = key motivation
- Content has **high production values**
- **Linear TV** is first choice for large shared experiences e.g. sport, big drama
- Creates **talkability**
- **Broad age** appeal

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (514)



# Experience

## 10% of viewing time



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (514), 16-34 (161)

# Experience 10% of viewing time

“ I think I talk about TV a lot! At the moment it's Love Island and the World Cup. Those are our talking points in the morning, and whether that's seeing people or over text or WhatsApp, a lot of our conversations are TV based ”

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (514)



68% live  
TV



85% viewed  
on TV set



66% evening  
viewing

Served by content which drives talkability:



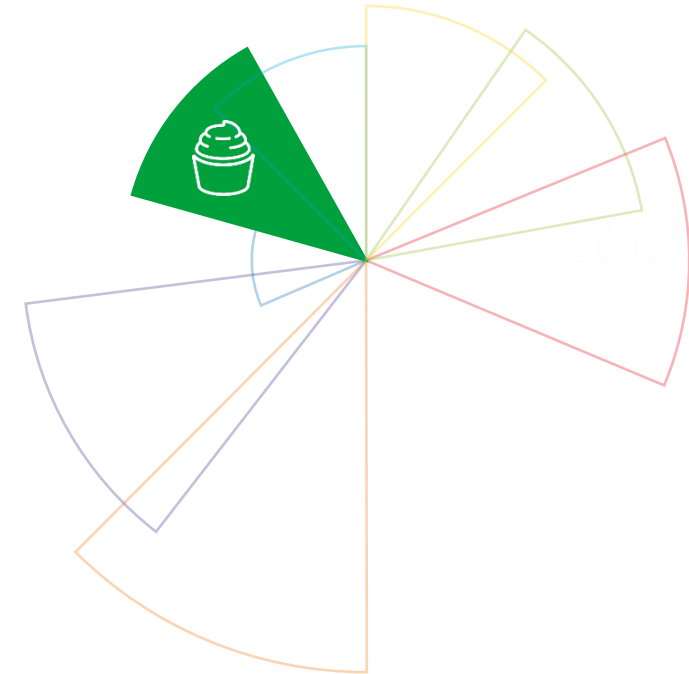
# Indulge

## 9% of viewing time

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

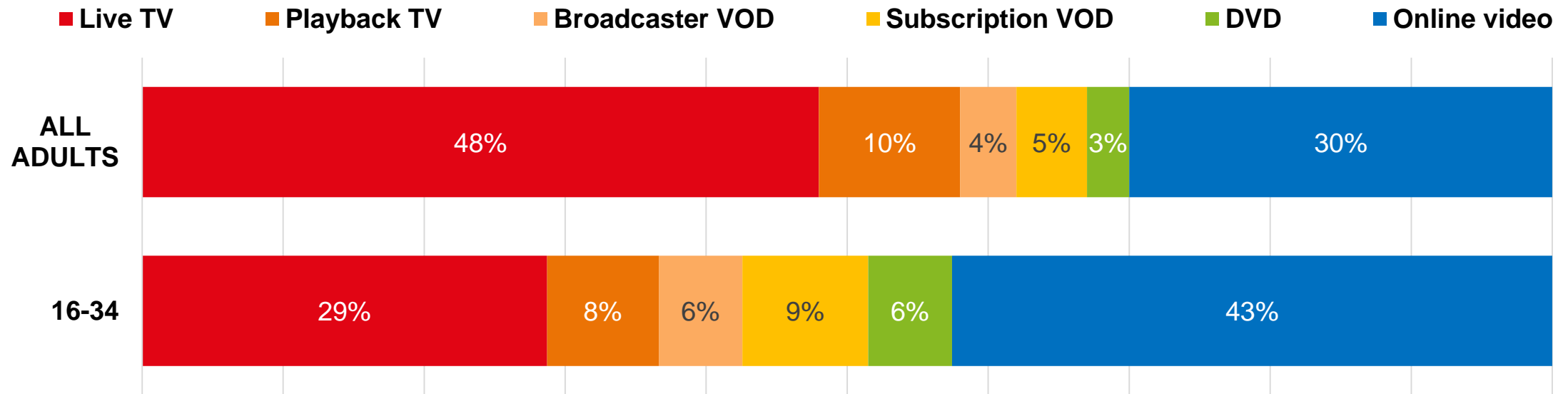
- Viewers are **active, engaged** and **relaxed**
- Moment is viewed as 'my time'
- Fulfils a **personal viewing need**
- Content is **long form** in addition to short online video covering a huge **range of topics**
- Niche **documentaries** and UK/US **reality series** are popular

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (532)



# Indulge

## 9% of viewing time



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (532), 16-34 (206)

# Indulge 9% of viewing time

“ The worst prisons in the world, like the ones in South America. I just love watching them. I used to want to be a prison officer when I was younger. I just love the inside of prison life and find it fascinating ”

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (532)



40% 16-34  
profile

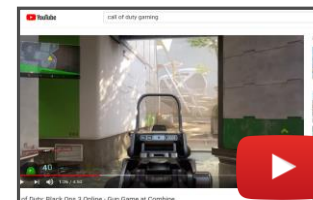
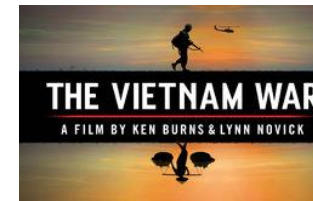


30% online  
video



60% solo  
viewing

Served by content relating to hobbies and interests:



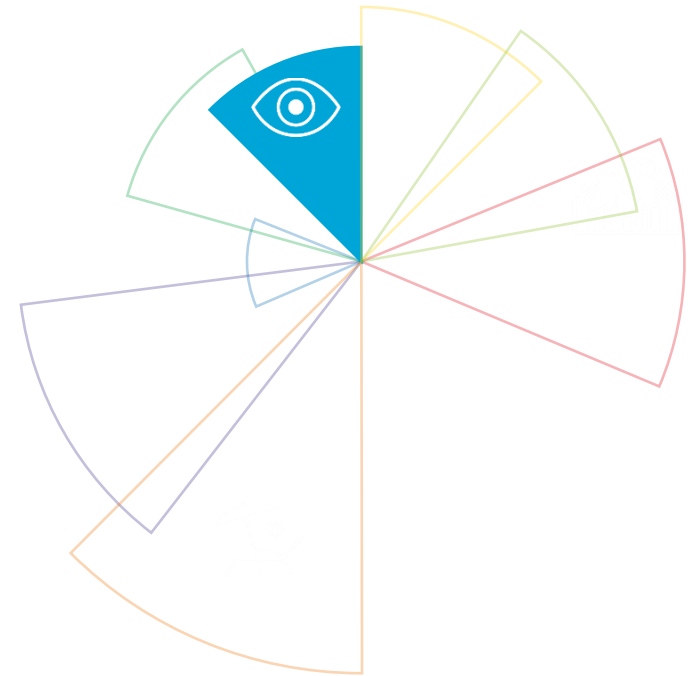
# Escape

## 7% of viewing time

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

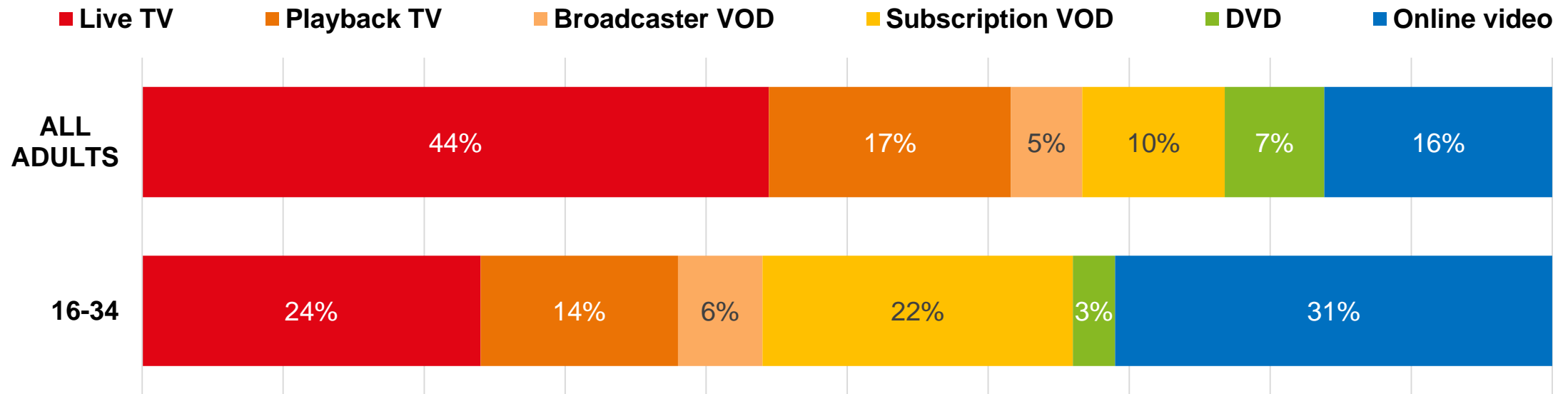
- Viewers wanting to ‘lose themselves’ in content
- Content has high production values
- Platform choice is driven by where content available
- Volume of content and flexibility of viewing is important
- British or American content

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (375)



# Escape

## 7% of viewing time



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (375), 16-34 (118)

# Escape

## 7% of viewing time

“ With The Sinner I was just gripped from start to finish, watching one after another. I was going to bed at 1am and then 3am the next night. There were so many twists and turns, it really had me! ”

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (375)



32% On-demand



38% Drama



68% evening viewing

Served by high quality drama:

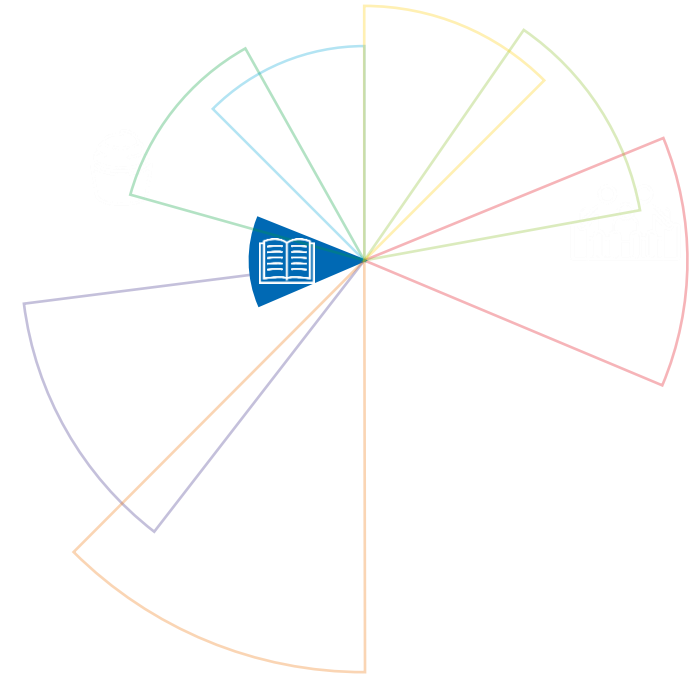


# Do

## 2% of viewing time

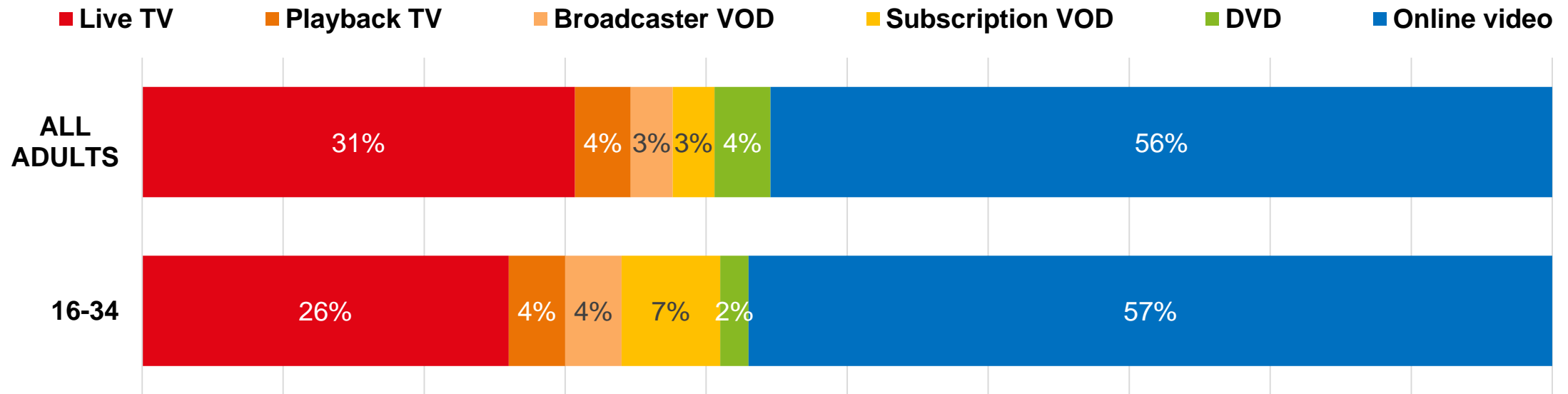
The need to find useful information that can be practically applied to any area of life

- Focussed and **task/ goal-orientated**
- Often met through **short-form video** content
- **YouTube** is first destination for many
- Production values and quality less important



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (136)

# Do 2% of viewing time



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (136), 16-34 (53)

# Do 2% of viewing time

“ If you need to know how to do something, being able to see someone doing it is something new that wasn't available before...I don't have to wait for a broadcaster to produce it, I can find it myself. ”

Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (136)



56% online  
video

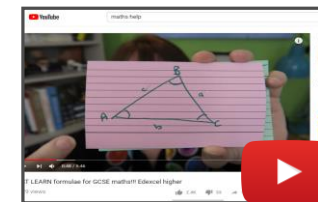
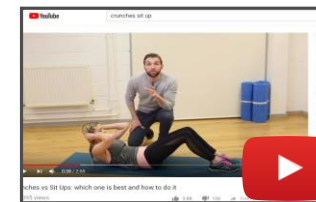
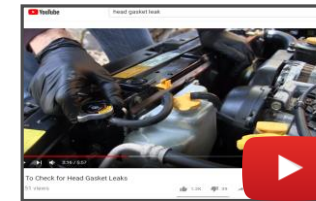


69%  
watched on  
device



54% how-to  
videos

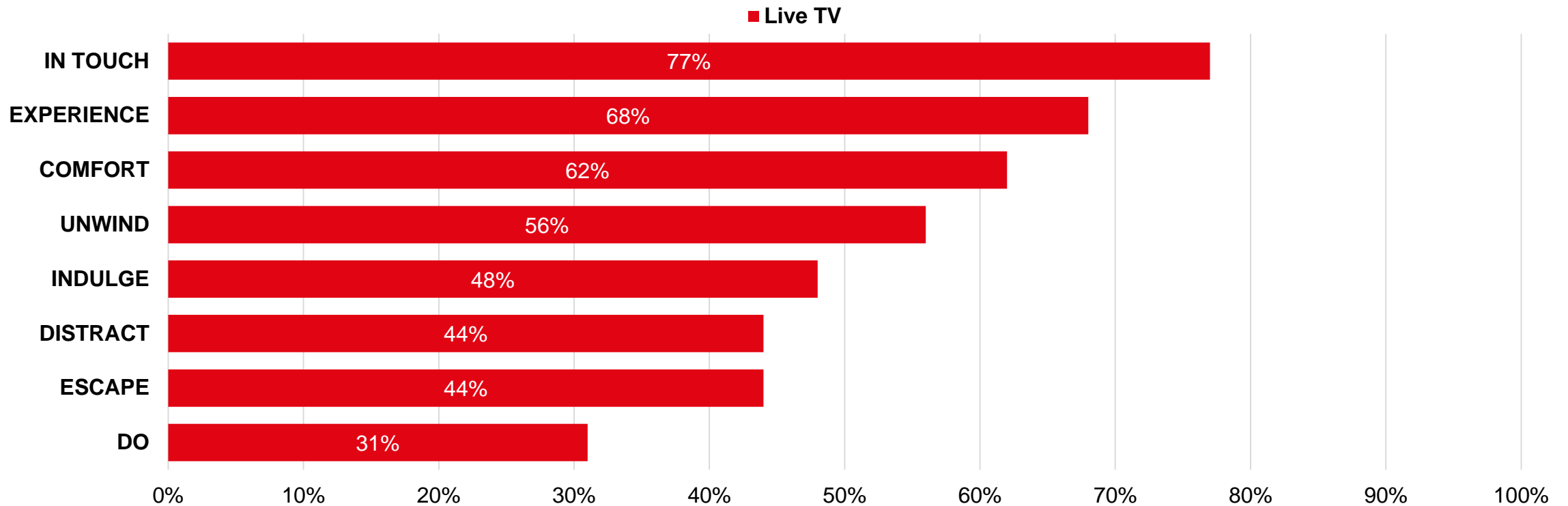
Served by instructional/ how-to videos:



# Device viewing & life-stage

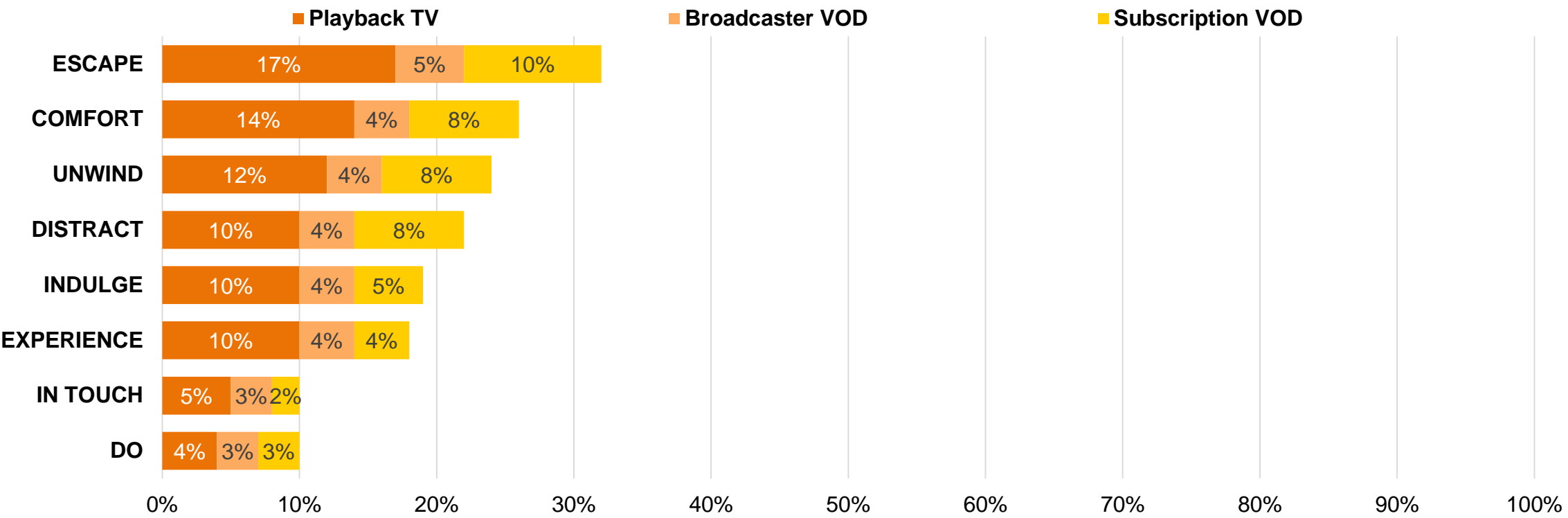


# Live TV viewing is driven by need to keep in touch and experience viewing with others



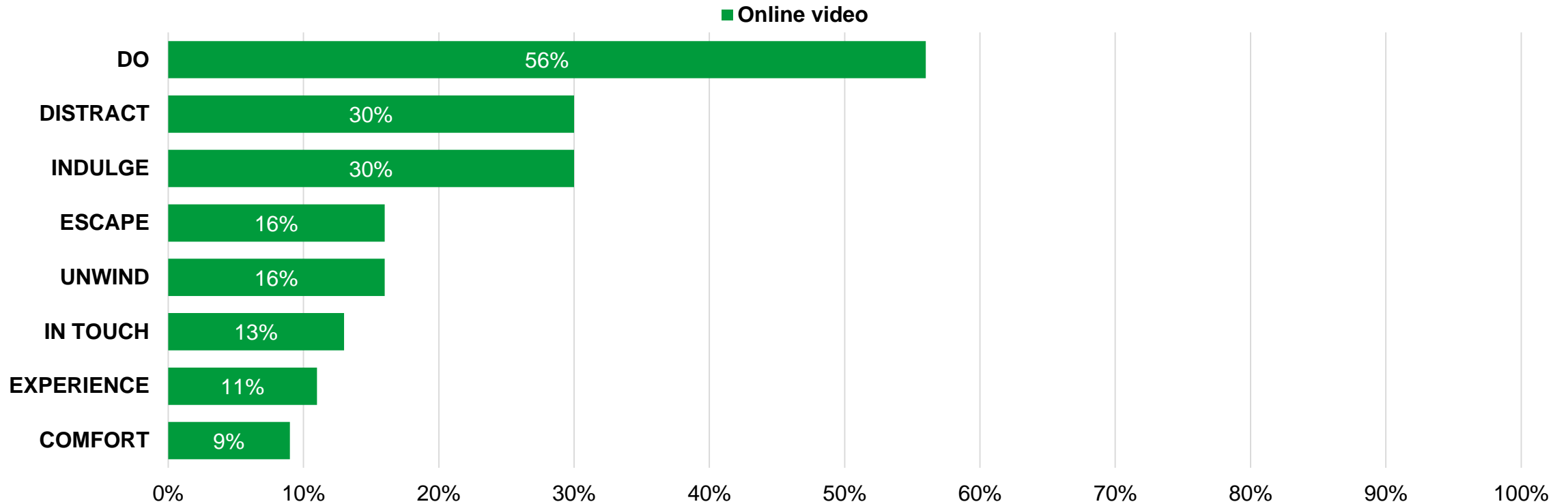
Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (53 – 1,531)

# The need to immerse ourselves in content to ‘escape’ drives on-demand viewing



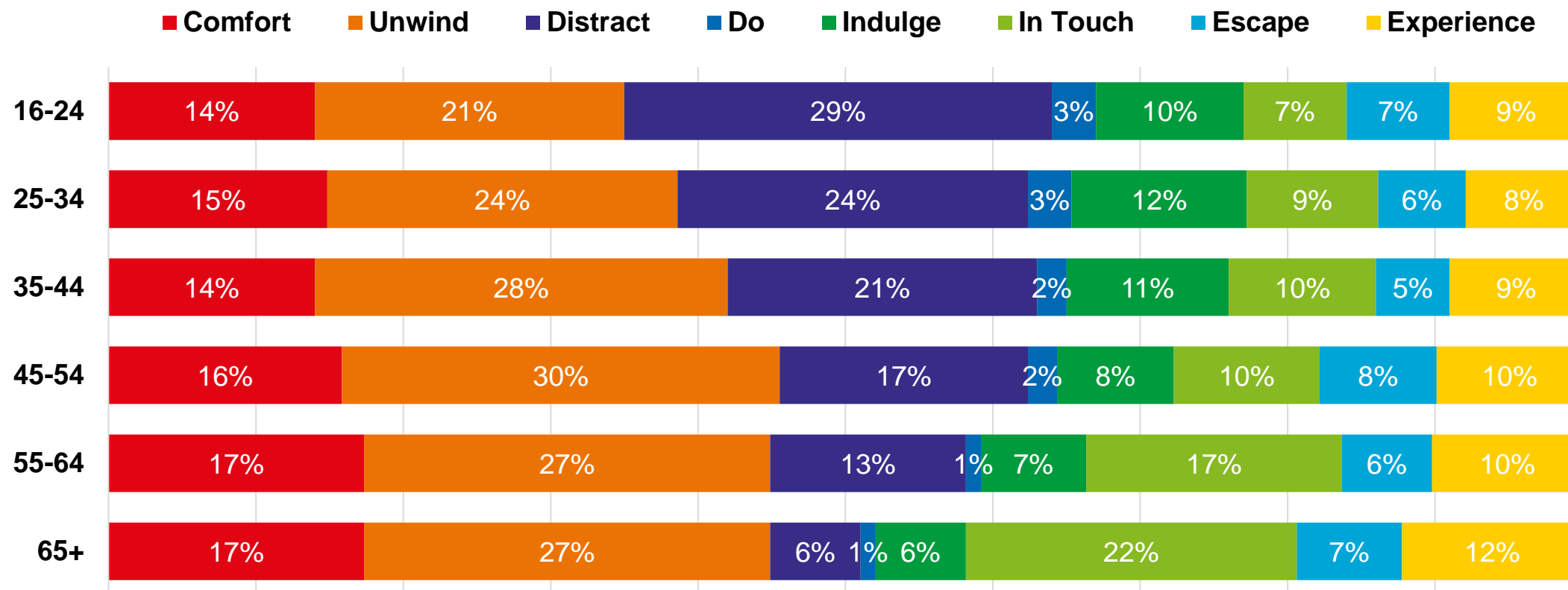
Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (53 – 1,531)

# Viewing for practical tasks, or to distract ourselves, has high online video usage



Source: The Age of Television, 2018, MTM/Thinkbox. Base: all adults (53 – 1,531)

# Almost a third of 16-24's viewing is in the 'distract' need state



Source: The Age of Television, 2018, MTM/Thinkbox. Base: 16-24 (908), 25-34 (1082), 35-44 (996), 45-54 (919), 55-64 (898), 65+ (907)