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Morse on the Evolution of TV Viewing

The current state of affairs in TV programming presents a truly competitive market place for TV creators and providers. The dramatic surge in viewing options comes as a result of the large variety of sources that are now available including the fact that 77% of people with broadband access get at least some of their content online.

Dr. John Morse of Byron Media noted, "The media ecosystem continues to evolve with declines in live viewing and increases in SVOD and online digital video usage. It's difficult to project where this will all be several years from now. Who will be the winners and losers?"

A diverse variety of content has also led to new viewing patterns and the programs that consumers choose to view. These include:

- Seventeen percent of respondents prefer to marathon view all the programming content of a series when that option is available. In addition, almost 60% prefer to marathon view the vast majority of their viewing choices when that is an option.
- Over 80% of viewers like the idea of having an entire season of a program's episodes available at the same time. This "simultaneous release" has contributed greatly to the popularity of programs like House of Cards. 76% are more likely to watch shows when they have this option
- Another part of the changing viewing landscape is that, among consumers who use more than one content source, only 50% choose live TV as their default source i.e. the first place they turn to watch TV, An additional 21% choose programs recorded via DVR and 13% prefer Netflix.

It is also important to understand that more viewing choices have a direct relationship on the evolving variation of consumers' viewing habits. Research has shown:

- Twenty two percent of viewers seek out specific shows with which they are already familiar while 15% search for new program choices.
- When a viewer has a TV connected to the Internet, 31% look for new shows and only 12% prefer to stick with their current program choices. When a TV is connected through a game console, 37% of viewers look for new content.
- Of Netflix subscribers, 29% believe that, with so many new program viewing options, it is easy to find new shows that they might like.

Of course advertising and promotion are also key components in the viewing choice puzzle. Almost 90% of viewers report that they heard of new shows via advertising, 61% by word of mouth, 78% of viewers indicate that a TV promo made them aware of a new show while 11% got that information on a website. Interestingly the specific network on which a program is found has little impact on the new program choices of many consumers as 43% indicate this did not play a role in their decisions.

Additional Content Notes

- The most often viewed shows on line most likely still air on live TV. Many viewers find the web is a convenient means on which to catch up on missed episodes of a favorite show.
- Netflix is highly represented on line and in general the highest consumption level of shows being viewed are distributed across a smaller number of shows
- Sixty seven percent of respondents who watch Pay TV view their new shows on live TV while on-line 54% of viewers choose Netflix as their top choice
- Landmark episodes of a show are the most likely types of content to be watched live

	On Line	Set-top Box
Season finale	16%	80%
Season premiere	17%	79%
Series finale	18%	78%
Series premiere	19%	77%
Show in its first season	20%	76%
Watch with others	17%	76%
Show In its final season	20%	73%

From broadcast network	21%	73%
Hour-long drama	20%	72%
Sitcom	20%	72%
Watch by yourself	27%	70%
From basic cable network	27%	70%
Getting a lot of buzz	22%	69%

- Shows most often delayed 6 months are more likely to be viewed on line or on a DVR
- Netflix has joined the four major networks as being perceived to produce the best sitcoms and competition reality shows
- Top dramas list includes other cable networks AMC HBO. AE, Showtime and Netflix plus NBC and ABC.. CBS is not listed among the top eight.

Hub Entertainment Research, November, 2013

Whether its audience measurement, distribution or ad sales, marketing/promotion, multi-platform, or program content and scheduling, Byron Media has made the bottom-line difference for companies like yours. For further information please contact John@ByronMedia.com or call 212-726-1093