

Multi-screen Viewership Boosts TV Fandom and Loyalty, According to Viacom's "Getting With the Program: TV's Funnels, Paths and Hurdles"

New Research Explores How Audiences Discover, Trial and Watch TV Shows

NEW YORK--(BUSINESS WIRE)-- Viacom (NASDAQ: VIAB, VIA) today unveiled the results of "Getting With the Program: TV's Funnels, Paths and Hurdles," a new study exploring how audiences discover, watch and become fans of TV shows. The findings reveal that the proliferation of devices and sources is having a positive impact on viewership and fandom. Additionally, multi-screen viewers (those who used multiple screens and sources) demonstrate a preference for live TV and stronger network loyalty compared to single-screenerers (those who only used one screen).

The study involved in-person interviews in Boston and Chicago and online surveys of more than 1,500 U.S. Viacom viewers ages 13-44. The online survey included digital diaries on TV viewing paths, for which respondents listed up to 10 TV programs in the order they watched them "yesterday," and logged more than 7,000 shows.

"The goal of our research was to uncover the often complex paths audiences take to discovering and becoming fans of our content," said Colleen Fahey Rush, Executive Vice President and Chief Research Officer, Viacom Media Networks. "What we're seeing is that the myriad of sources and devices has taken fandom to new heights, making TV a bigger part of our audiences' lives than ever before."

The study shows that, compared to a few years ago, a vast majority (79%) of viewers say having more ways of accessing shows helps them try more programs and 78% wouldn't have become fans of some shows if they couldn't watch in multiple ways. Multi-screen viewership is also connected to a stronger preference for live TV and network loyalty:

- 47% of multi-screenerers say it's important to watch their favorite shows live, versus 23% of single-screenerers;
- 45% of multi-screenerers are loyal to a few networks, versus 28% of single-screenerers; and
- 45% of multi-screenerers wouldn't give up pay TV because they rely on DVR, versus 22% of single-screenerers.

Funnels to Fandom

The process of becoming a fan occurs over the course of a five-stage process, or a TV viewing funnel. The journey starts with discovery of a show, followed by research, selection, fandom and ultimately sharing.

- **Discovery:** in-person word of mouth is the #1 source for show discovery at 90%, closely followed by TV promos at 85% and word of mouth online or via social media at 78%.
- **Research:** once aware of a show, viewers usually watch an episode to find out more (55%), check when it airs next (42%) or discuss with friends or family (35%). Nearly a quarter usually discuss the show online and via social media.
- **Selection:** when deciding what device or source to trial a TV show on, live TV is the most popular source (57%), followed by streaming (22%), DVR (10%) and VOD (6%).
- **Fandom:** once a viewer becomes a fan, they first want to know when the show airs on TV (61%), whether it is live (52%) and whether it is in-season or not (48%). When they've decided to continue watching, 53% watch on live TV.
 - Among fans, marathoning is popular across all age groups: 83% of Millennials say this is one of their favorite ways to watch, followed by 72% of Gen Xers and 65% of Digital Natives.
- **Sharing:** 61% of viewers recommend a show to others in-person, while 38% invite others to co-view. Among Digital Natives (ages 13-17), invitations to co-view are most prevalent at 47%, followed by Millennials (ages 18-34) at 40% and Gen Xers (ages 35-44) at 29%.

TVs are the most-used device for show discovery and fandom, while computers are most used for research. Live TV is the most-used source for show trial and continuing to watch a show.

Within the TV viewing funnel, audiences are dedicating more time to the discovery and research stages, which is driving greater fandom and sharing. Compared to a few years ago:

- 73% become interested in new shows more quickly;
- 50% spend more time researching shows before watching;
- 81% watch a greater variety of shows;

- 83% are fans of more shows at the same time; and
- 61% agree that TV is a bigger part of their social life.

Paths to Viewing

Drawing on data from the digital diaries, the study explores the different ways viewers watch TV programs, or their viewing path. While the growing number of devices and sources makes watching TV more complicated, it also promotes viewing.

- Gen Xers show a heavy reliance on live TV: 45% only watch live TV and 80% watch live TV at any point in a given viewing path.
- While Millennials tend to stream more than Gen Xers, they still rely on live TV: 33% only watch live TV and 66% watch live TV at any point in a given viewing path.
- Digital Natives rely on a mix of streaming and live TV: 45% only watch live TV and 70% watch live TV at any point in a given viewing path.

Hurdles, Encountered and Overcome

There are a number of hurdles viewers encounter when looking for specific TV shows. The most common is not having access to the latest episode (79%), followed by not being able to find the show on TV (77%).

Audiences turn to alternate devices and sources to overcome these hurdles. For example, when a viewer cannot find their show on TV, they usually watch something else on live TV, DVR or VOD. If they are looking for the same show, they first go to network/show apps or sites, followed by download-to-own sources like iTunes or Amazon. Viewers ranked "deciding not to watch TV" as the least likely solution for each hurdle.

"Our fans are very driven and solution-oriented when it comes to finding their favorite shows," continued Rush. "We want to encourage that fandom by making content available whenever, wherever our audiences' TV viewing paths take them. Understanding these paths will help us leverage multiplatform opportunities even more strategically."

The Future of TV is Bright

Viewers are very positive about TV's future when asked to look ahead five years.

- 84% agree that they will have more options for where, how and what to watch.
- 83% will watch a greater variety of TV programs.
- 79% will keep up with more TV programs at the same time.
- 76% expect better recommendations from sources and devices.

About Viacom

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