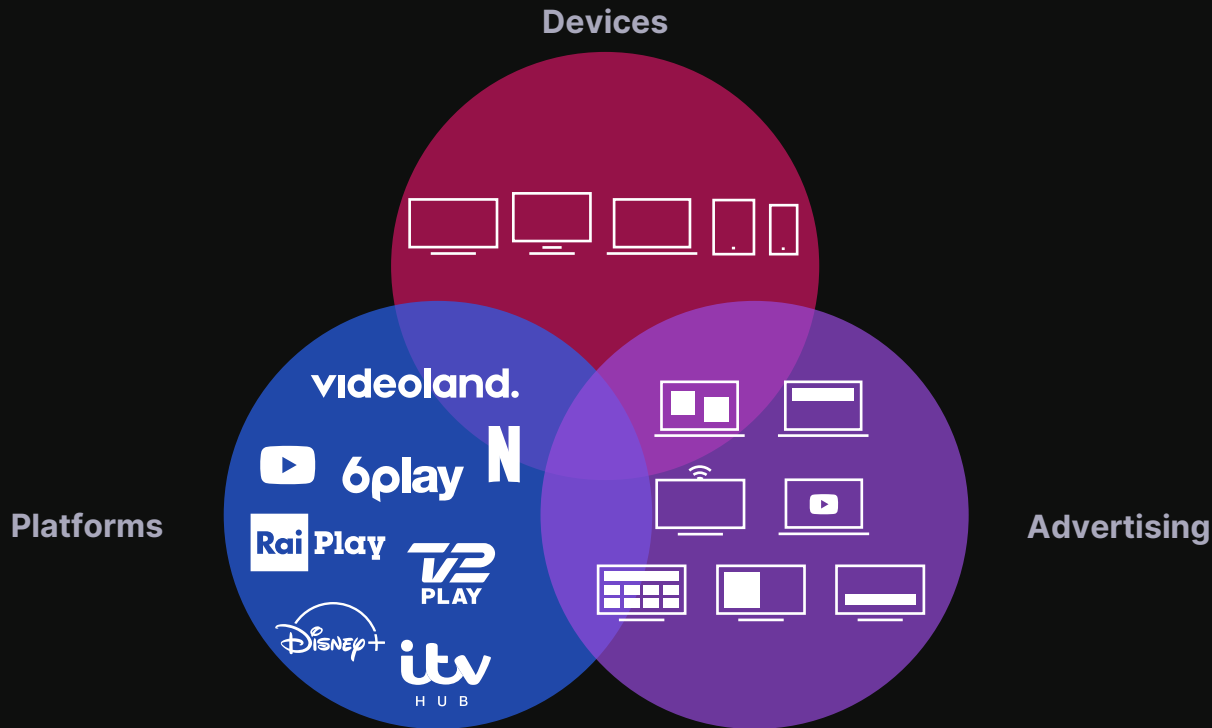
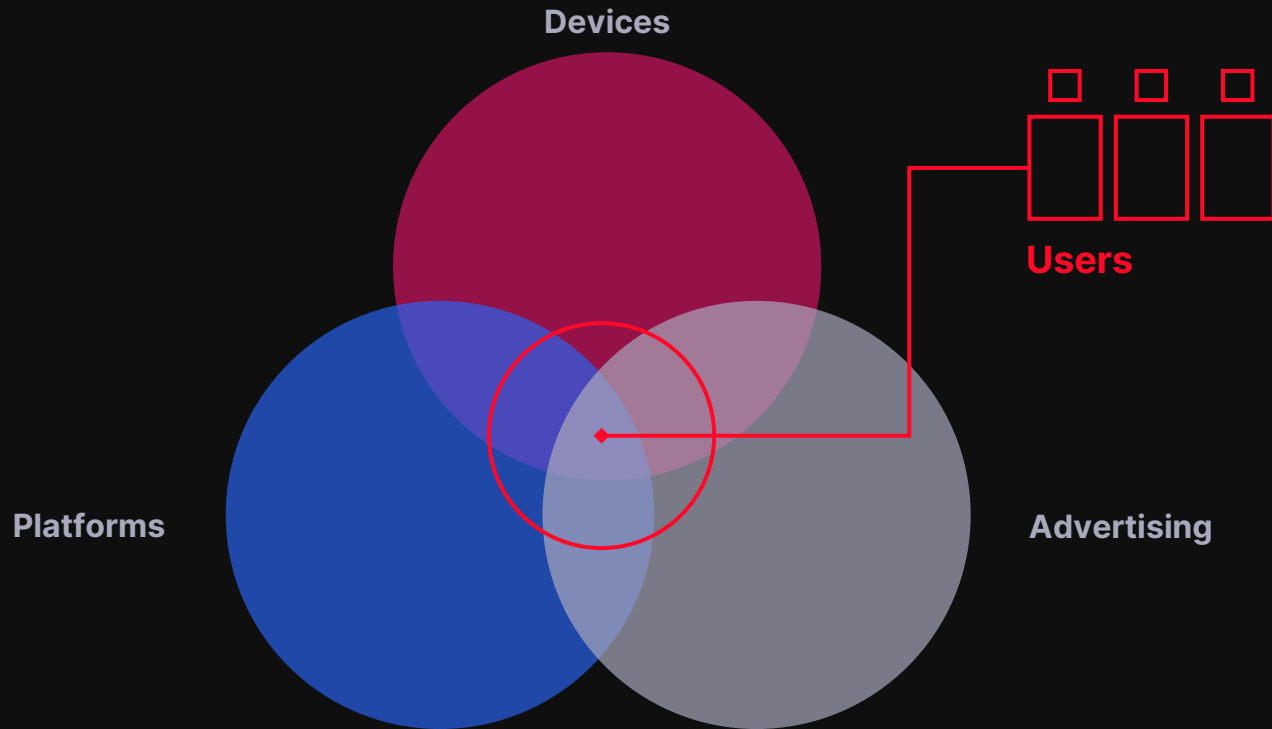


Understanding the many driving forces in Total Video



By focusing on its gravitational center: the users!



The living room puts users in a positive mood

Safe

Warm Cozy

Enjoyable

Refuge

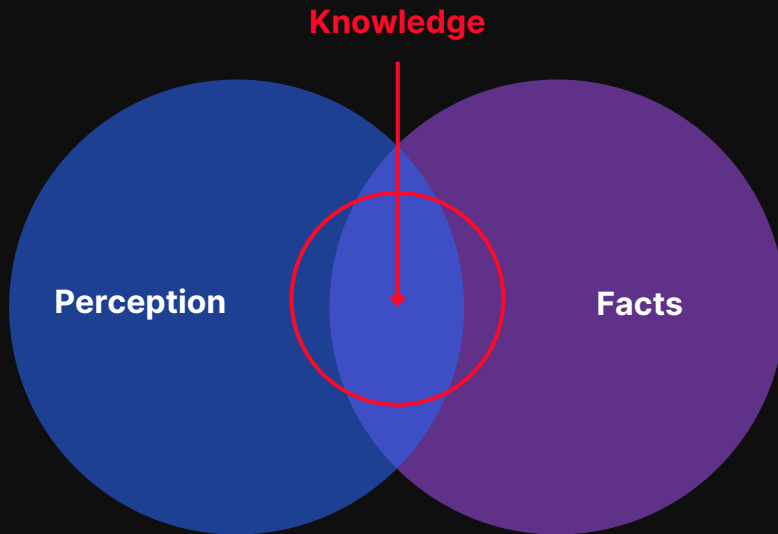
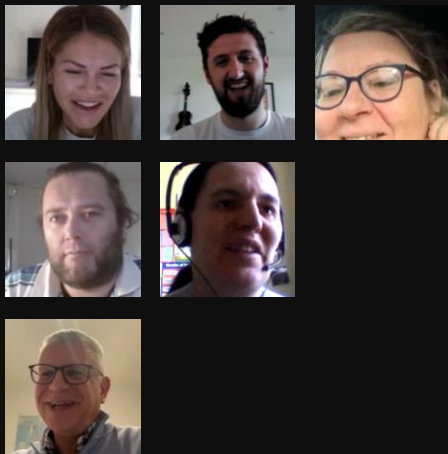
Feel Good Oasis

Relaxation

Favorite place

An epistemologic approach to build knowledge about users

A week spent
with the users
18 interviews
& whatsapp blogs



Prove & measure our gut feelings
beyond cultural differences
10 countries
8 500 respondents

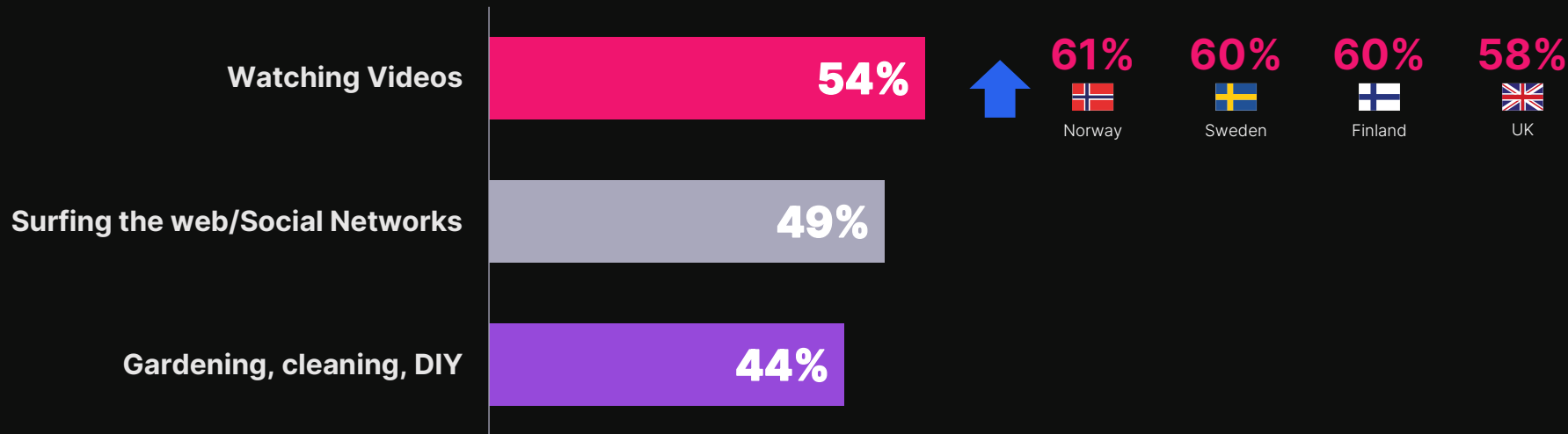
Denmark	
Finland	
France	
Germany	
Italy	
The Netherlands	
Norway	
Spain	
Sweden	
United Kingdom	


A photograph of a woman with blonde hair hugging a young child from behind. They are in a living room setting. On the wall behind them is a framed piece of paper with the handwritten text "F Scott Fitzgerald". The entire image is covered with a semi-transparent blue overlay. The text "THE NEW LIFE OF THE LIVING ROOM" is centered in white, bold, sans-serif capital letters.

THE NEW LIFE OF THE LIVING ROOM


Watching video is a the core of our home activity

What are the 3 activities you do the most at home? (Top 3 in %)





As soon as I am
in the living room
the TV is on.



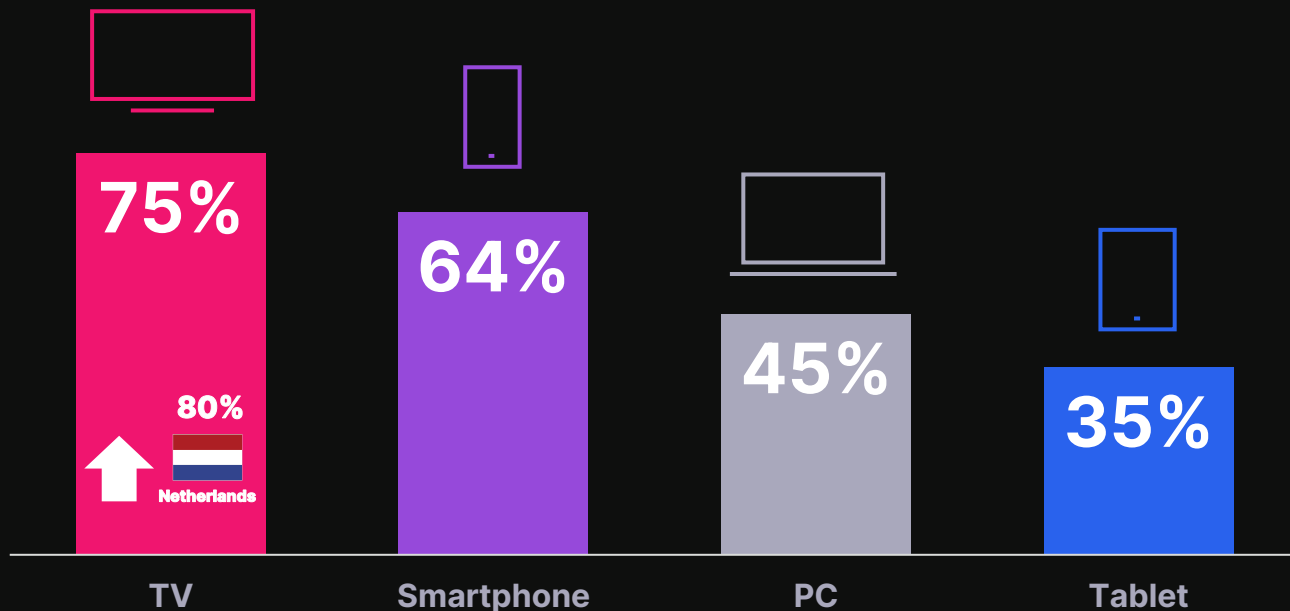
David

Midlife, France

TV Screen is where more of the viewing happens

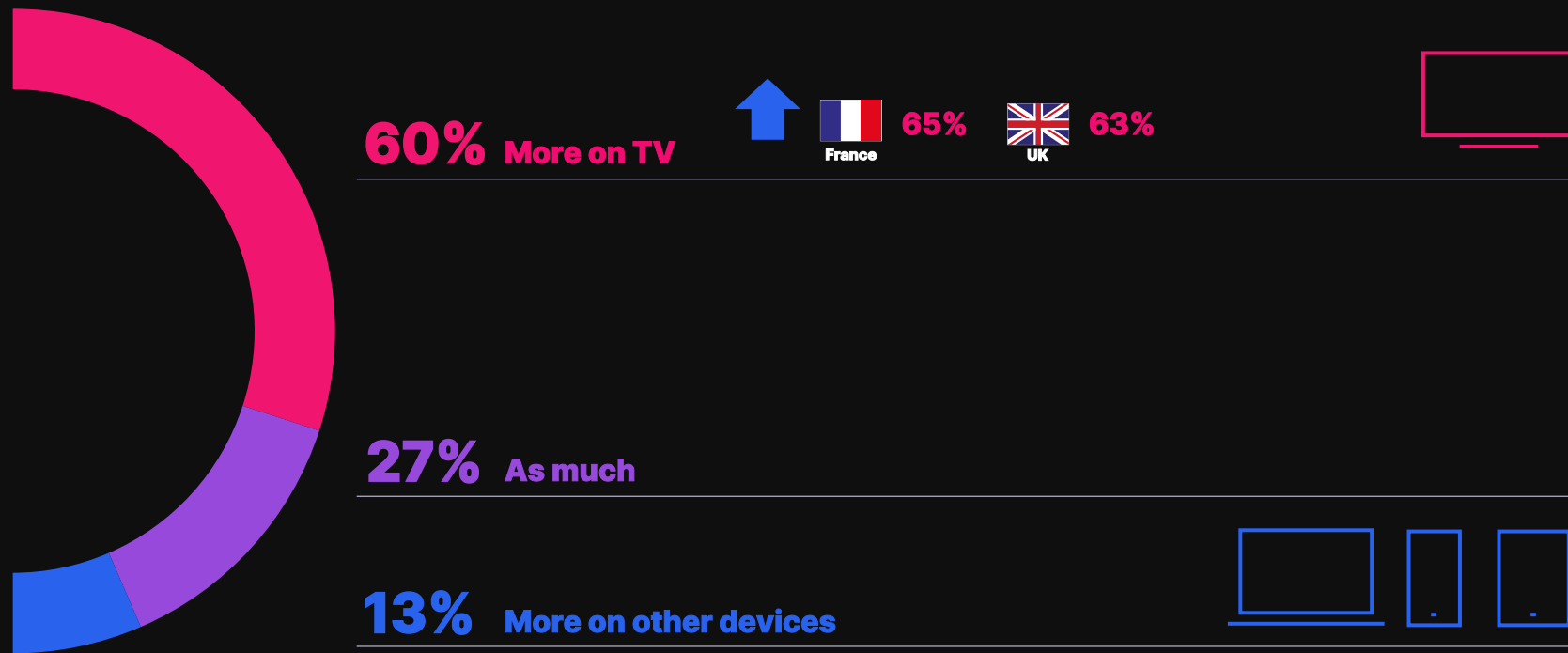
How often do you use them to watch video contents (series, films, sports, TV programs)?

Every day or almost everyday.



TV Screen is where more of the viewing happens

In general would you watch video content? Only one answer possible.



A trend accelerated by the pandemic

Since the current health crisis, would you say that you watch video content (series, films, sports, TV programs...) on TV Less or More?



We can't imagine the living room without TV

TV SETS

92%

of Europeans
own a TV set

SMART TV SET

71%

of Europeans
own a Smart TV set



Netherlands

77%

NEW TV

55%


purchased a Smart TV
in the last 2 years




Italy

68%

65% Young



TV has a great role [...] it's part of home decoration, flat screens look great & the room would look empty without it.



Julien

24 years old, France

Users expect more from their TV set

BIGGER



39%

Larger screen

Users expect more from their TV set

BIGGER

BETTER



32%

Image quality

Users expect more from their TV set

BIGGER

BETTER

SMARTER



38%

Smart features

Connecting to the internet is a must, directly or with a device

TV SETS

79%

of Europeans connect
their TV sets directly



86%

Netherlands

STICK OR DONGLE

55%

connect it with a stick
or a dongle



69%

Denmark



69%

Sweden

SET TOP BOX

68%

connect it to
a set top box



74%

France



United Kingdom



ADVERTISING CHALLENGES IN THE NEW LIVING ROOM

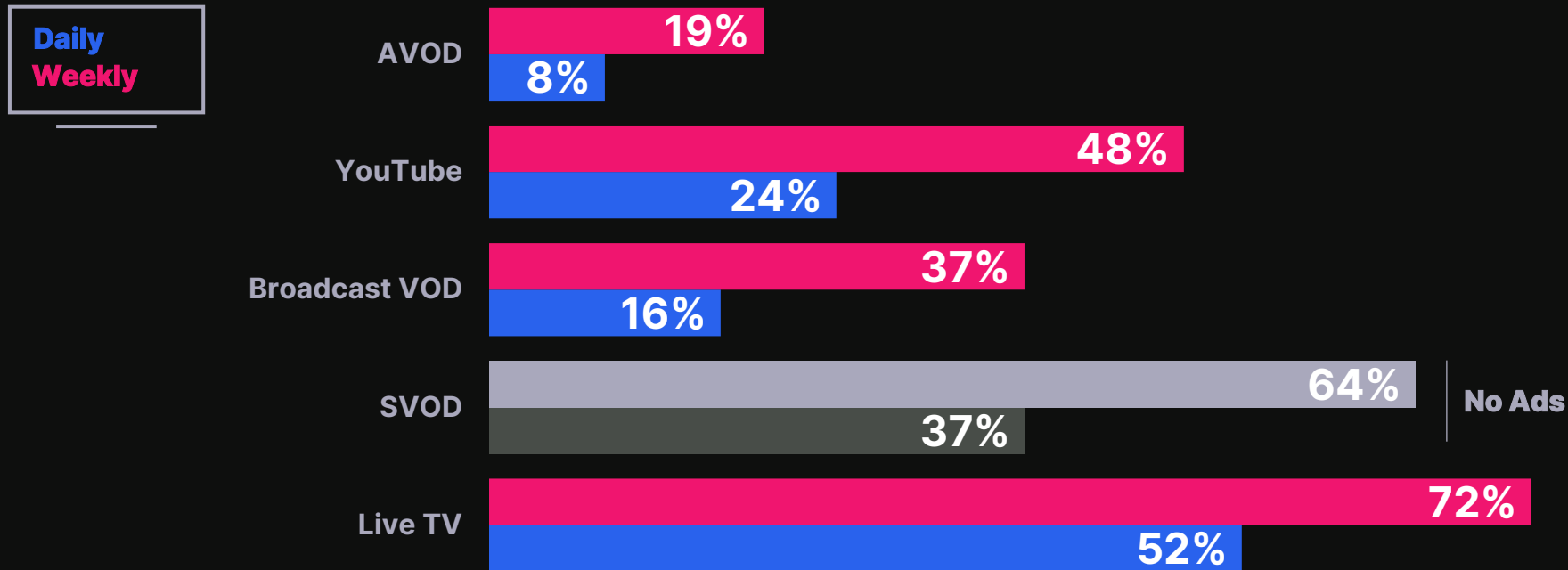
CHALLENGE 1

**ADJUSTING & GROWING
TACTICS TO ALIGN WITH NEW
VIEWERSHIP BEHAVIOURS**

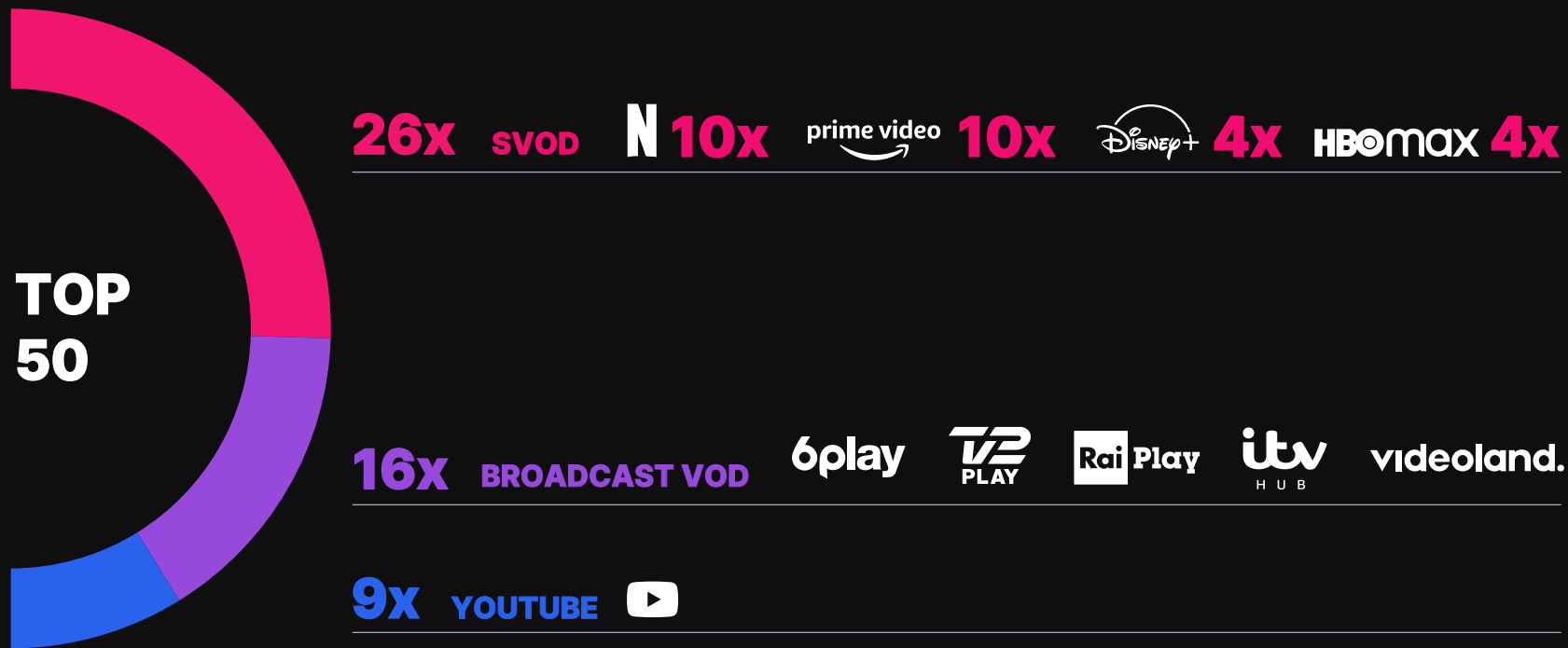
Connected TV is one screen but a lot of different platforms

For you personally, how often do you watch video content (series, films, sports, TV programs...) on your TV / Smart TV / Connected TV?

(Basis : Own a TV set) Multiple answers possible



A scattered landscape of streaming usage on CTV...



... and local specificities that require adaptation

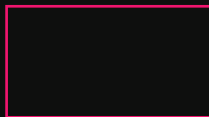
For you personally, how often do you watch video content (series, films, sports, TV programs...) on your TV / Smart TV / connected TV?

(Basis : Own a TV set). Multiple answers possible.

LIVE TV CHAMPIONS



France



84%

watch weekly

+12pts vs average

BVOD ADDICTS



UK



58%

watch weekly

+21pts vs average

SVOD LOVERS



Spain



77%

watch weekly

+13pts vs average

AVOD PIONEERS



Italy



26%

watch weekly

+7pts vs average

CHALLENGE 2

**MANAGE TO GO
BEYOND THE ANNOYING
ASPECT OF AD**

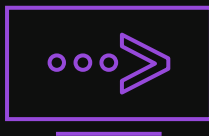
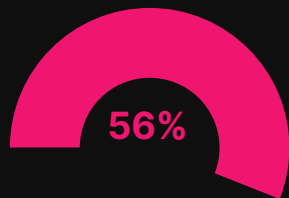
Ads are annoying whatever the video platform

To what extent are you annoyed by ads on each platform?

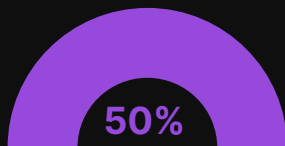
5 means it's very annoying, and 0 means it's not at all annoying. Use the numbers in between to moderate your opinion. One possible answer per platform.



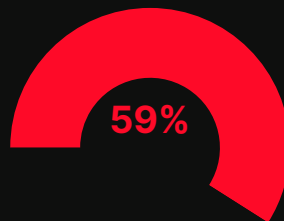
Linear



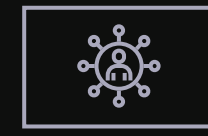
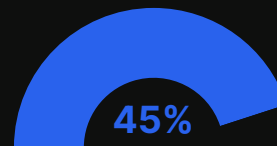
Broadcast VOD



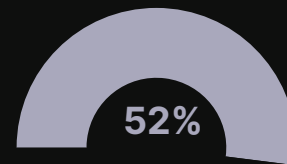
YouTube



Ad Supported VOD



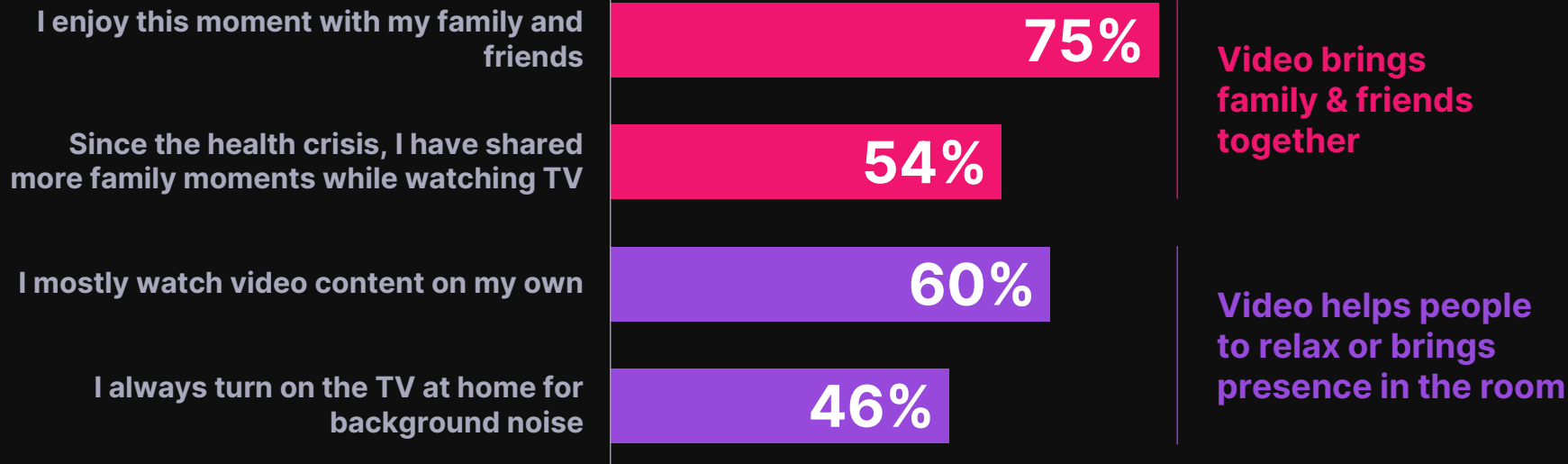
Social Networks



Video covers a wide range of different experiences

Here is a series of statements about how you watch TV programs or streaming platforms.

For each of them, please indicate the extent to which you agree? One possible answer per statement.

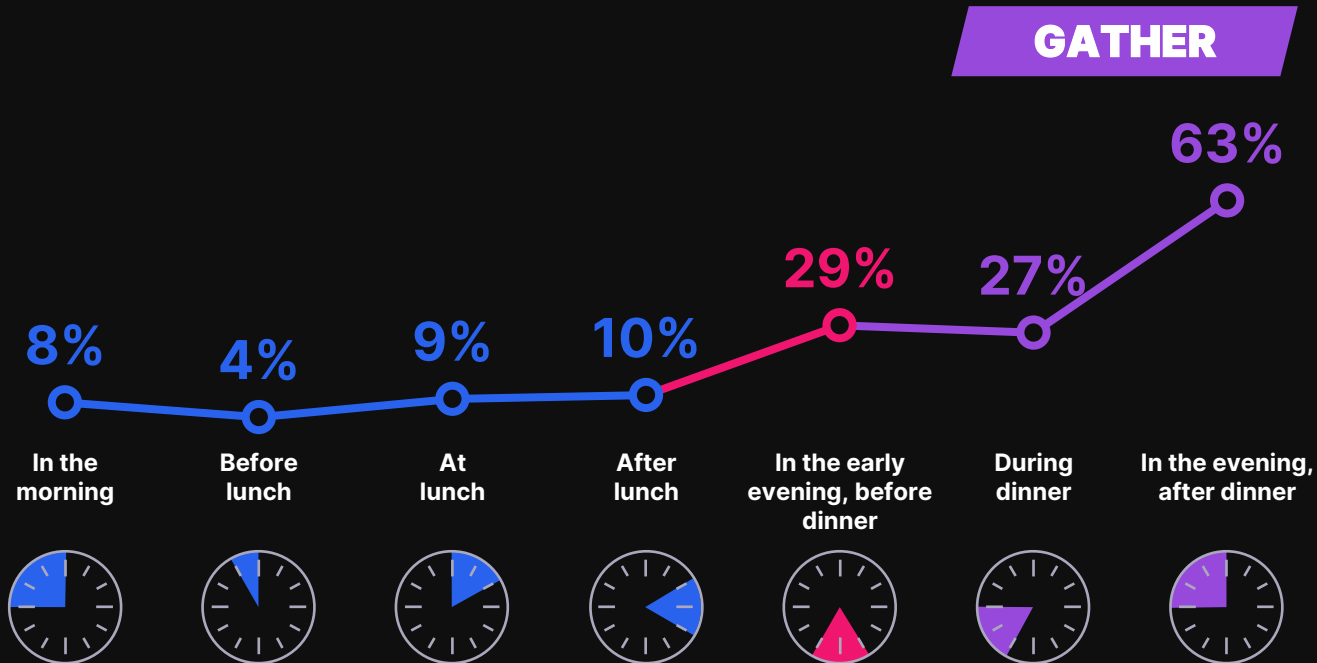


Mood are tied to viewing moments



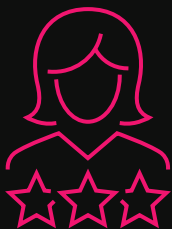
A great moment of togetherness!
Five friends eating pizza in front
of TV.

Tristan
Young, France



Consumers expect to find personalized marketing

PERSONALIZATION



71%

of consumers expect
personalization from brands

RECOMMENDATIONS



67%

want relevant product
recommendations

TAILORED



66%

want messages to be tailored
to their needs

It's also true for the advertising they see on their TV screens

Would you be interested in receiving targeted advertising on your TV that suits more your interests?





CHALLENGE 3

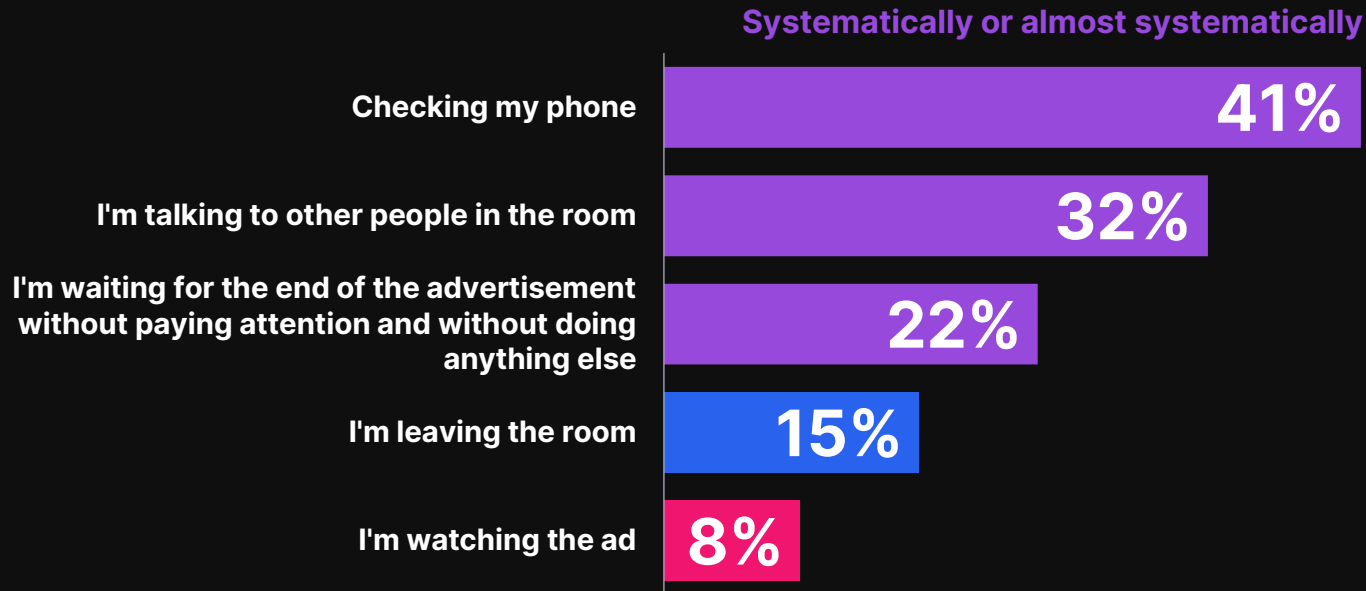
GRAB ATTENTION!




Video Ads draw mostly passive attention

In general, what do you do during the ad regardless of the device used?


One possible answer per statement.



Remaining
in front of
the screen



I'm discovering that
I don't switch channels
systematically.



David

Midlife, France

But great ads have the power to draw attention

PRODUCTION



// I can watch it again
and again.

Vivan
Family, DE

EMOTION



// It usually makes
you smile.

Karen
Family, UK

HUMOR



// It was pretty
cool.

Eric
Young, DE

MUSIC



// A lot of rythm,
a great design.

Tristan
Young, FR

Platform & screen play a great role in generation attention

SCREEN COVERAGE

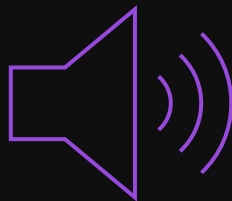


Linear TV & VOD cover

100%

of screen

SOUND

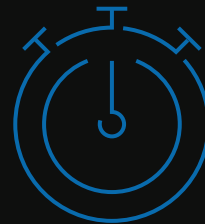


VOD has sound on

90%

of time

DURATION



TV & VOD ads are

50%

longer than YouTube

Ready to join us in the living room ?

EPICENTRE

THE NEW LIFE

THE CHALLENGES

***THE NEW LIFE
OF THE
LIVING ROOM***