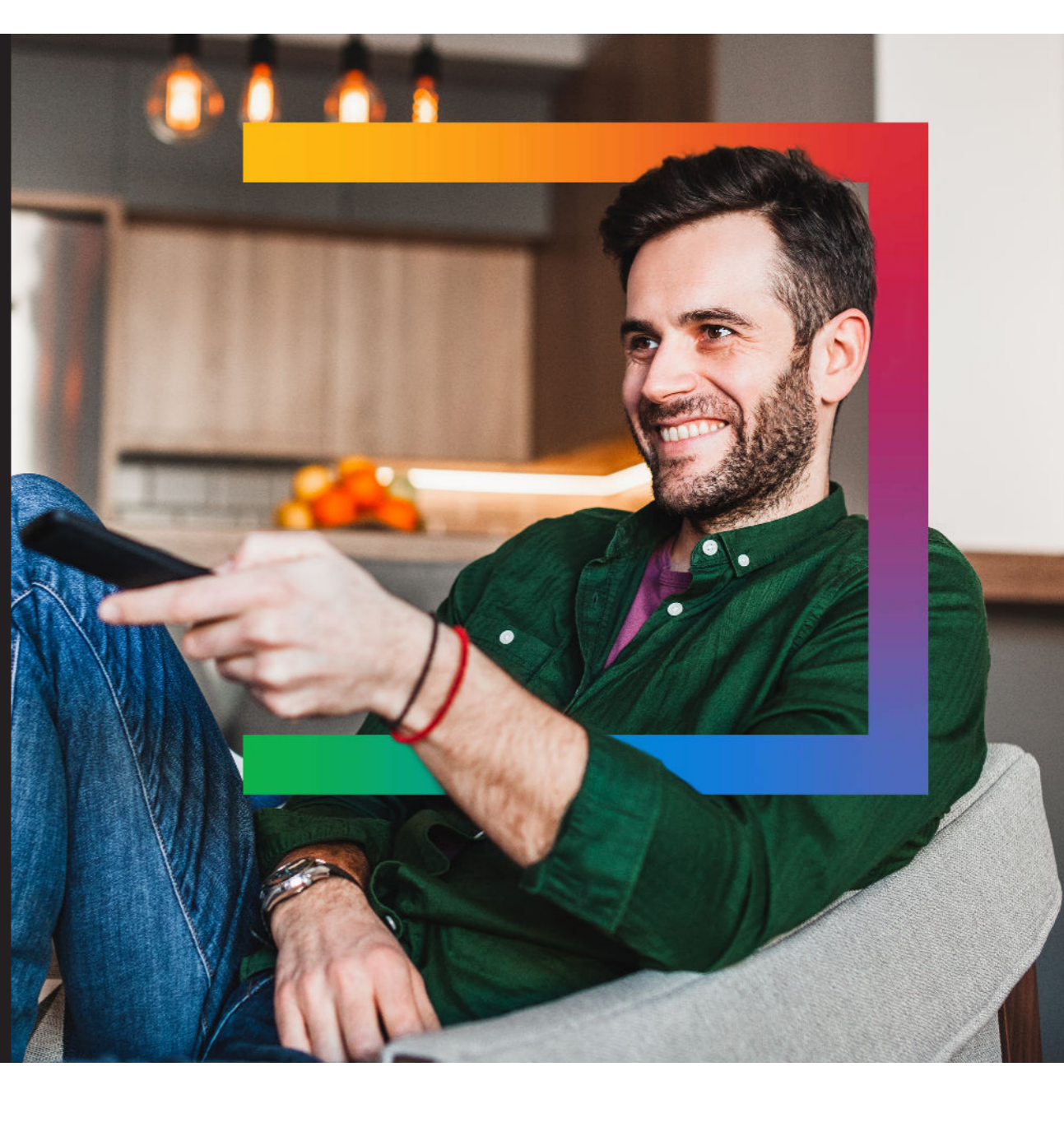


WHAT IS "TV"?

CONSUMER RESEARCH CONDUCTED BY KANTAR



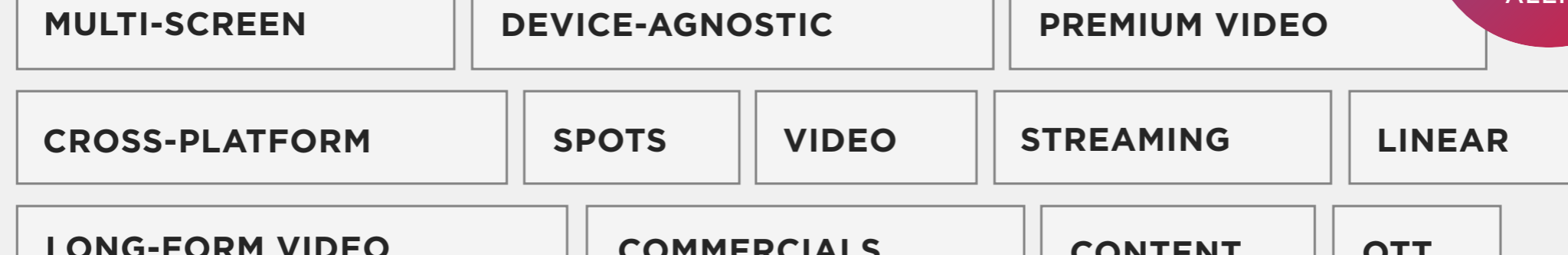
TV consumption is on the rise, and at the same time "TV" has evolved from the physical device in the living room to refer to many different aspects of premium content viewing.

Effectv conducted a consumer survey with Kantar to find out from consumers how they define TV. **The Answer?** Although there is a presumed attachment to the physical screen in the living room, TV is everywhere and not limited to that device alone. TV content can also be experienced on a smartphone, a tablet or a computer screen. Survey data shows the unifying characteristic for what counts as TV on those screens is premium, long-form content.

↓ Scroll down for some interesting findings.

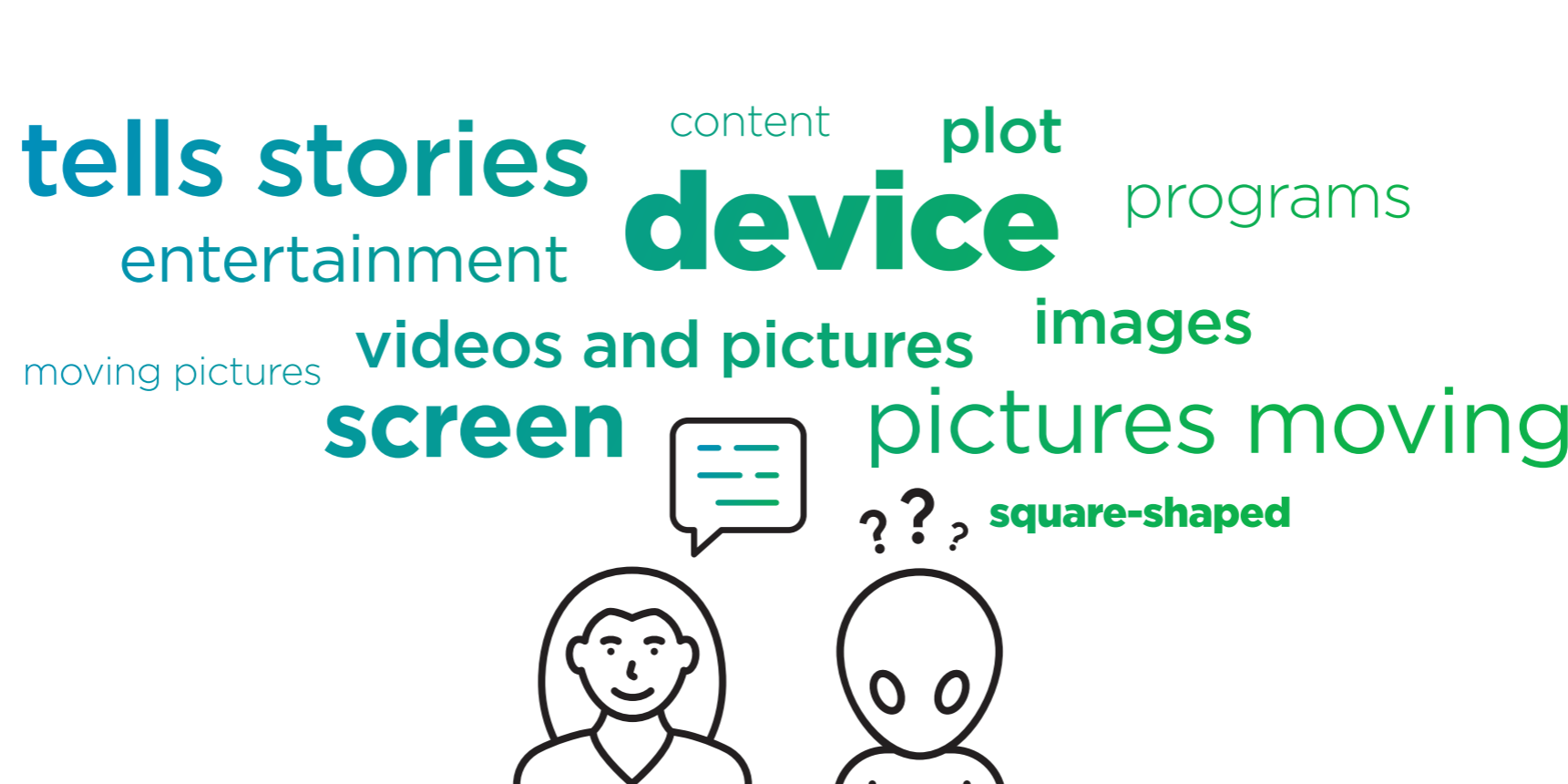
36% say they watch more TV this year compared to past years

There are many ways the industry refers to TV and television advertising...



However, when we asked more than 1,000 consumers to

DESCRIBE THE ACTIVITY OF "WATCHING TV" TO AN ALIEN, THEY USED WORDS AND PHRASES LIKE...

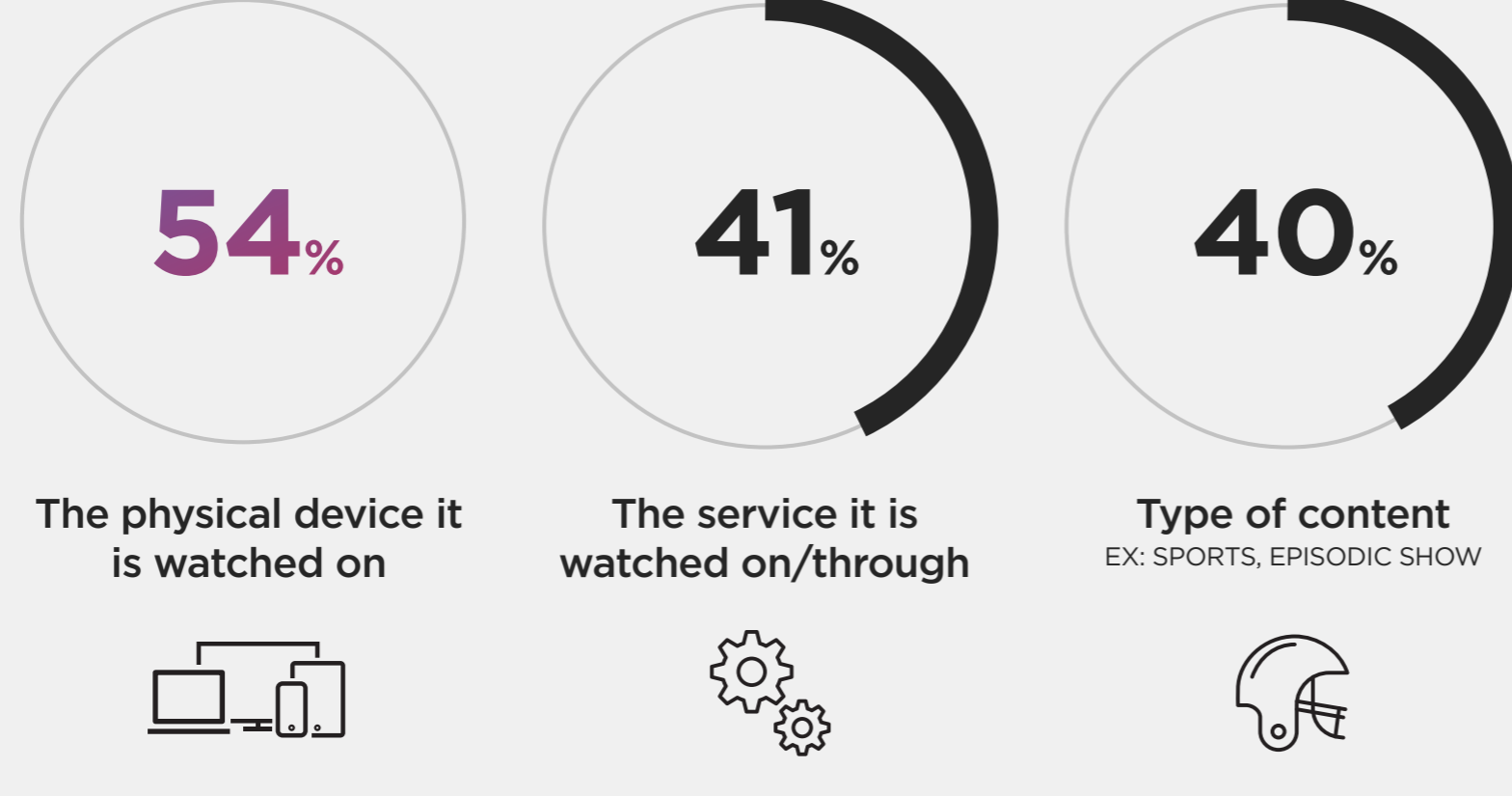


Most consumers use words like "device" and "screen" along with "stories" and "plot" to describe the act of watching TV

CONSUMER CRITERIA OF TV DEFINITION:

"To you, what makes the content you watch count as 'TV' when you say you are 'watching TV'?"

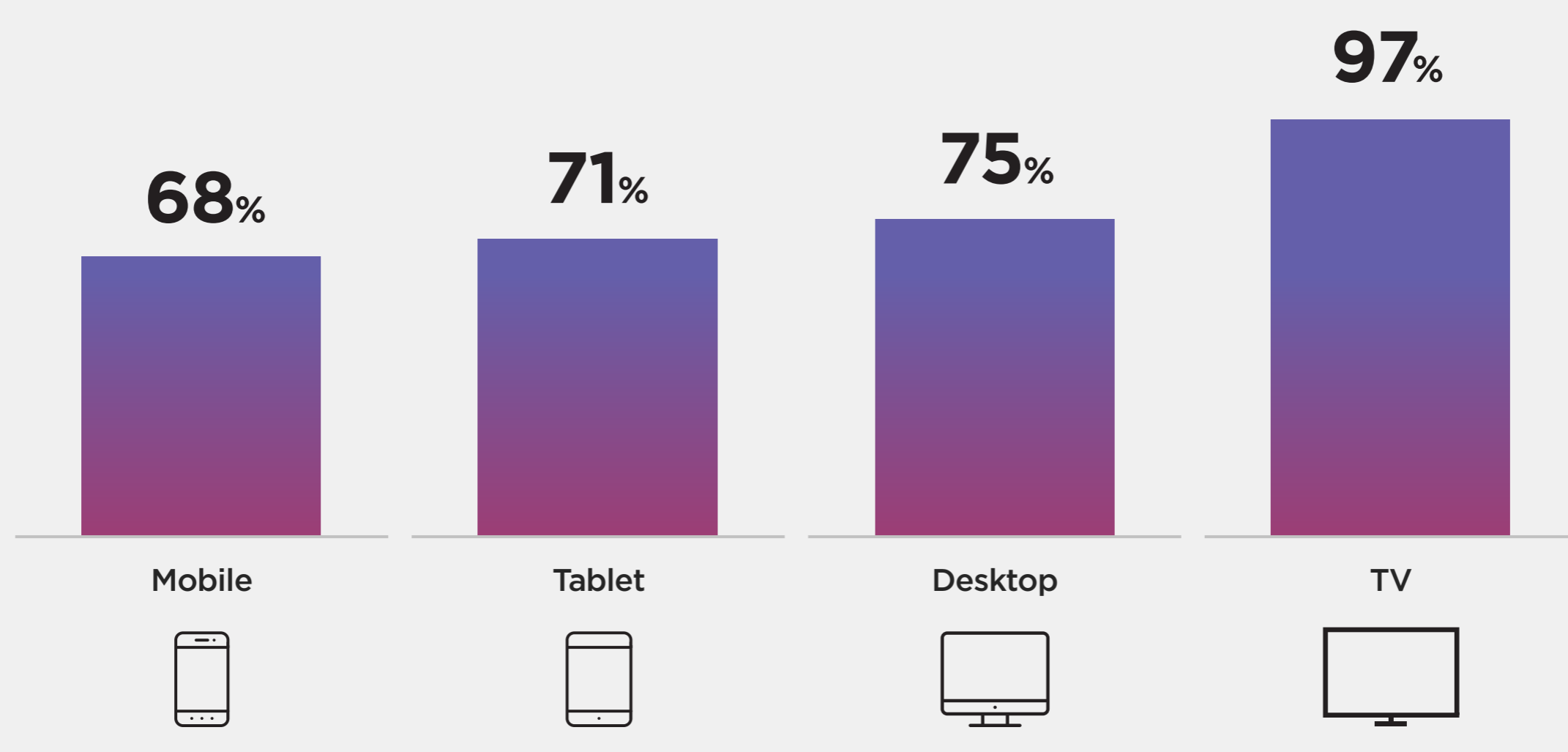
DISTRIBUTION OF TV DEFINING FACTORS (OVERALL SAMPLE, N=1173)



TV is mostly defined by the device, the service and the type of content

AS FOR DEVICE TYPES,

More than two-thirds of those surveyed agree that the devices below can be used to watch TV content. The larger the screen, the greater the association with TV.

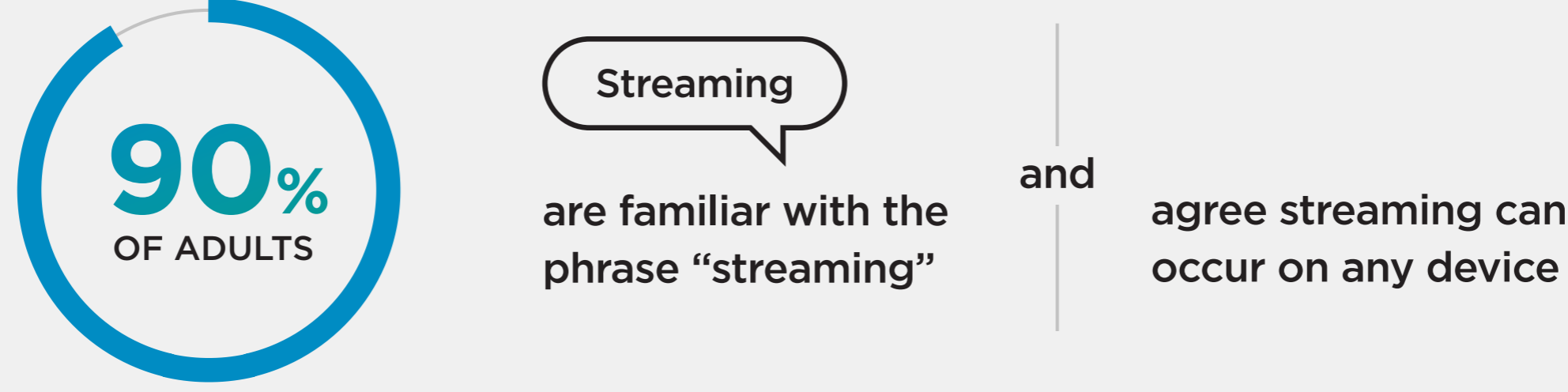


TV IS LONGFORM, PREMIUM CONTENT

Adults 18-54 are more likely to believe content length must be 20+ minutes to be TV.



55% of consumers refer to watching short-form video clips by the site/platform name, while 43% simply say "watching videos"



SUMMARY OF FINDINGS

Whether it's the device, the service or the content itself, "TV" is defined by consumers as the very best of viewing experiences.

Consumers define TV by various factors beyond the TV set
What they do agree on is that TV can happen on any device

"Watching TV" = 20+ Min.
Adults 18-54 are more likely to believe content length must be 20+ minutes to be "TV"

Streaming as a concept is now mainstream
90% of surveyed consumers said they were familiar with streaming, but many say that streaming happens with an internet connection, not a cable box

The larger the screen, the greater the association with TV
Of those surveyed, 68% said mobile devices could be used to watch TV, 71% said a tablet could be used and 75% said a desktop computer was also an option