In the Content Needs Study, we set out to understand the core needs that drive people to watch different types of TV and video content. For example, the need-state that a viewer is seeking to fulfill in the morning with news is likely quite different than the need-state he or she seeks to fulfill in the evening with a prime-time comedy or drama. We sought to understand viewing need-states for a few different reasons. The first being that it allows us to plot our networks and programs against a consumer framework for TV viewing to see where our portfolio is currently satisfying needs, and the second being that it highlights white spaces where we can develop new programming or ad experiences that satisfy underserved needs.

OBJECTIVES

- Understand how need-state/viewer mindset impacts choice in TV/Video programming.
- Create need-state/viewer mindset taxonomies for different genres and sub-genres of programming (e.g. Drama, Comedy, News, Sports, Reality as core genres, sub-genres TBD depending on how viewers bucket the shows into similar need-state profiles.)
- Map out Turner networks and programs against the need-states to identify where we're fulfilling consumer need-states and where there are white spaces for development.

BUSINESS APPLICATION

Core foundational consumer framework to help us:

- Better match ads to programming context
- Understand the nuances of genre and sub-genre impact on ad receptivity
- Provide a grounding in consumer needs and receptivity to ID white spaces for new program and ad product development

METHODOLOGY

Two-phased qualitative and quantitative research:

1. In-depth qualitative research where we'll walk consumers through their typical viewing day and dig into the need-states that drove their programming, platform, and device choices. We'll use this phase of research to develop a working framework to test and validate with quant.

   Objective: identify 6-8 core viewing need-states that consumers seek to satisfy through TV and video content.

2. In-market survey and Three-day Mobile Viewing/Need-state/Ad Receptivity Diary: via a self-report survey and 5-day mobile diary, we'll track what consumers watch, what need-state drives their show selection, and when/where/how/with whom they're watching, and ask briefly about receptivity to ads in the moment

   Objective: size each of the viewing need-states within a typical viewing day (e.g., what proportion of viewing is driven by seeking escape versus needing info to get prepared for the day) and plot genres and networks against the need-states that drive tune-in.
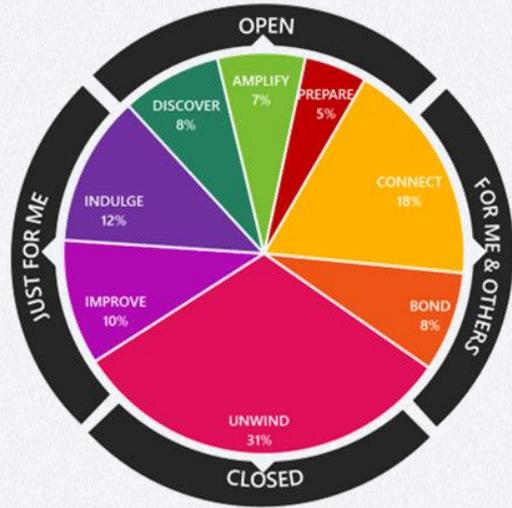
RESULTS

Phase 1: Q3 2016
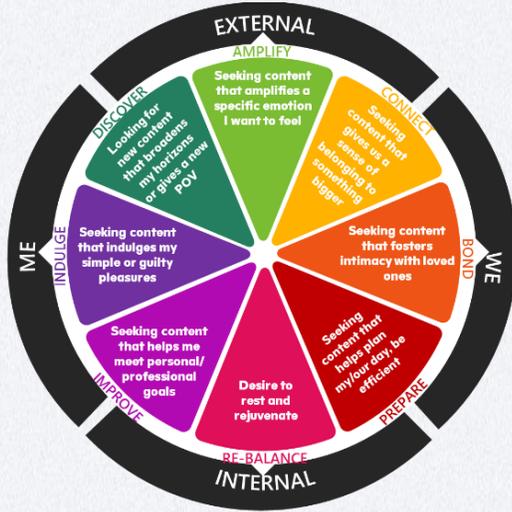
Phase 2: Q4 2016

Here are the 8 need-states discovered in Phase 1, using two dichotomies (plotted along x and y axes):
Y Axis- Open to Advertising (External) vs Closed (Internal)
X Axis- Just for me vs a shared experience

From the diary we can see the proportions of need-states throughout the day

This is the typical need-state profile of a day of video consumption

Viewers in an open state of mind are also more open to ads,
those in unwind are more likely to not mind them at all