

A person is shown in profile, looking at a smartphone held in their hands. The phone screen displays a live-action sports scene, possibly a soccer match, with players on a field and stadium lights. The background is softly blurred, featuring a warm, glowing lamp that creates a cozy atmosphere. The overall color palette is warm, with oranges, yellows, and soft blues.

# TV & MEDIA 2015 FRANCE REPORT

The empowered TV & media  
consumer's influence

Ericsson ConsumerLab

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# ERICSSON CONSUMERLAB ANNUAL RESEARCH

REPRESENTING  
**1.1 BILLION**  
PEOPLE



MORE THAN  
**40**  
COUNTRIES

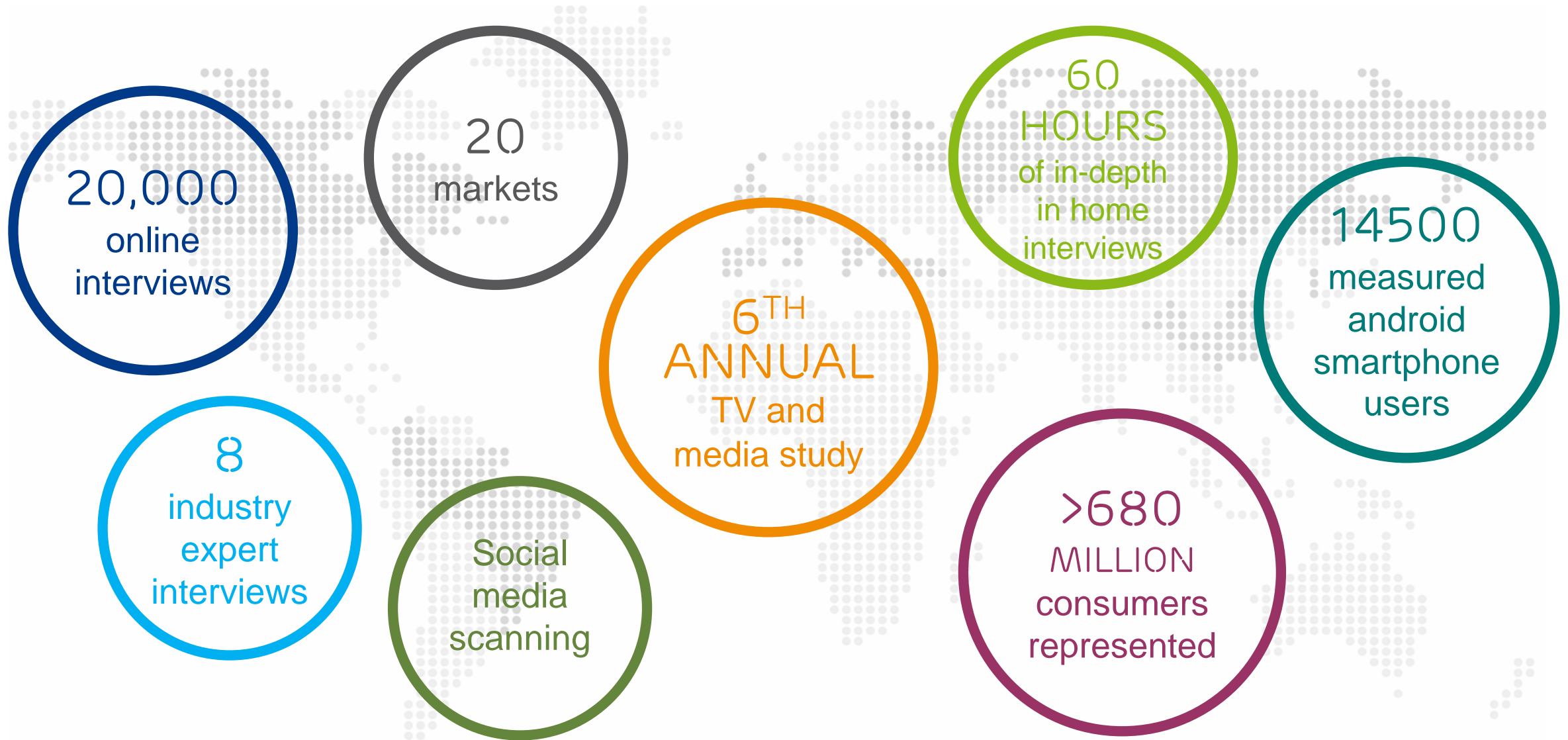


**100,000**  
RESPONDENTS



**15**  
MEGACITIES  
STUDIED

# TV & MEDIA 2015 STUDY





# REPRESENTING >680 MILLION CONSUMERS



- Qualitative and quantitative
- Quantitative

Qualitative: 30 in-depth interviews (San Francisco, Mexico City, Paris & Stockholm)

Quantitative: 20 000 online interviews (1000/country) age 16-59 + booster >2500 online interviews age 60-69

Base 20 Markets: Brazil, Canada, China, Colombia, France, Germany, Greece, Ireland, Italy, Mexico, Portugal, Russia, Spain, South Korea, Sweden, Taiwan, Turkey, UK, Ukraine, US

# GLOBAL KEY FINDINGS I



## › Streamed on-demand content is soaring

- Over 50 percent of consumers state that they watch streamed on-demand video content at least once a day, up from 30 percent in 2010
- Today, people estimate that they spend 6 hours a week watching streamed TV series, programs and movies on-demand. This has more than doubled since 2011, when weekly viewing was estimated to be 2.9 hours a week

## › Linear TV remains key

- The popularity of linear TV remains high, mainly due to its access to premium viewing and live content, like sports, and its social value
- Linear viewing is linked to age: 82 percent of 60–69 year olds say they watch linear TV on a daily basis, while only 60 percent of millennials (those aged 16–34) do so

# GLOBAL KEY FINDINGS II



## › Binge viewing changes the game

- Bingeing, the watching of multiple episodes of TV and video content in a row, has rapidly become a key part of the TV and media experience
- This habit is prominent among Subscription Video-on-demand (S-VOD) users, where 87 percent binge view at least once a week, compared to 74 percent of non S-VOD users

## › Millennials prefer the mobile screen

- Those aged 16–34 spend 53 percent of all their video viewing time on a smartphone, laptop or tablet
- Since 2012 the number of consumers across all age groups who watch video on their smartphones has increased by 71 percent. The average time spent watching video on mobile devices is up 3 hours a week compared to 2012

# GLOBAL KEY FINDINGS III



## › The difficulty of finding content

- Half of consumers watching linear TV say they can't find anything to watch at least once a day. As many as 62 percent of consumers aged 25–34 face this challenge on a daily basis
- Consumers feel that recommendation features are simply not smart or personal enough

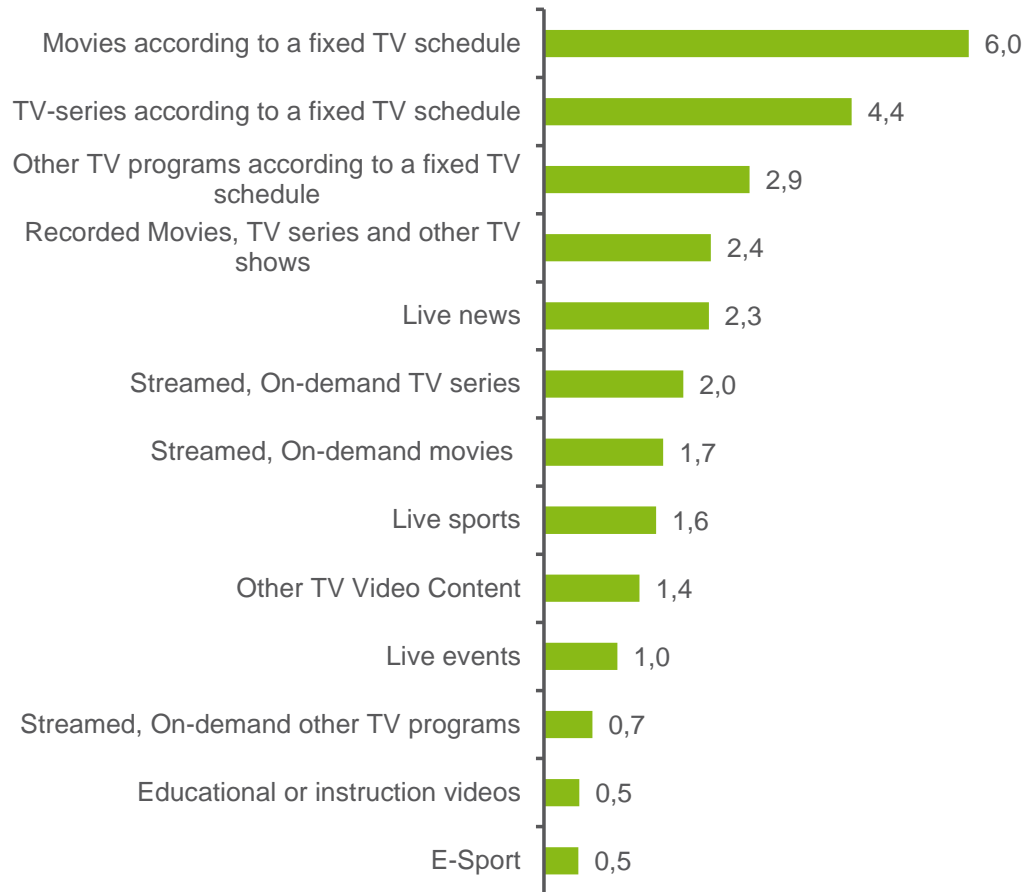
## › Non-believers in traditional pay TV may eventually change their minds

- For TV cord-nevers (consumers who have never had a pay TV subscription) it is difficult to understand the value as it is offered today. Long binding times, inflexible packages and high costs and advertising cause 50 percent to believe they will not pay for it, even in the future
- However, 22 percent of cord-nevers are already paying for over-the-top (OTT) content services, indicating a willingness to pay for subscription TV, albeit with a different bundle approach

# HALF OF VIEWING TIME IS TV SERIES & MOVIES



Average nr of self-reported hours watching per week and type



Family movies. More than series, family movies, funny movies. Sometimes I like to mix, start with children movies and then go on with action movies and closing with a funny movie to go to sleep happy.”  
- Veronica, 40 years, Mexico



**27 HOURS**  
per week is the average weekly active viewing time





# THE IMPORTANCE OF TV SERIES & MOVIES

- › Out of the total 4,3 hours per week consumers spend watching streamed on demand long content, we find that TV series is the content type with the highest viewing – claiming more than 45 percent of the total streamed on demand viewing. This is closely followed by movies, claiming ~40 percent of the total streamed on demand viewing

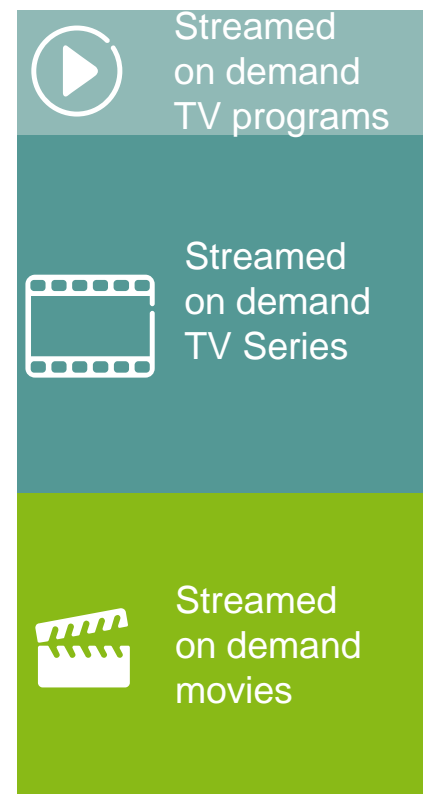


The world of series is so, so huge now, there's so many of them. And that's taken over from normal films from cinema."

- Anne, 38 years, France

Average number of self reported weekly hours of active TV/video viewing:

4,3 h/week



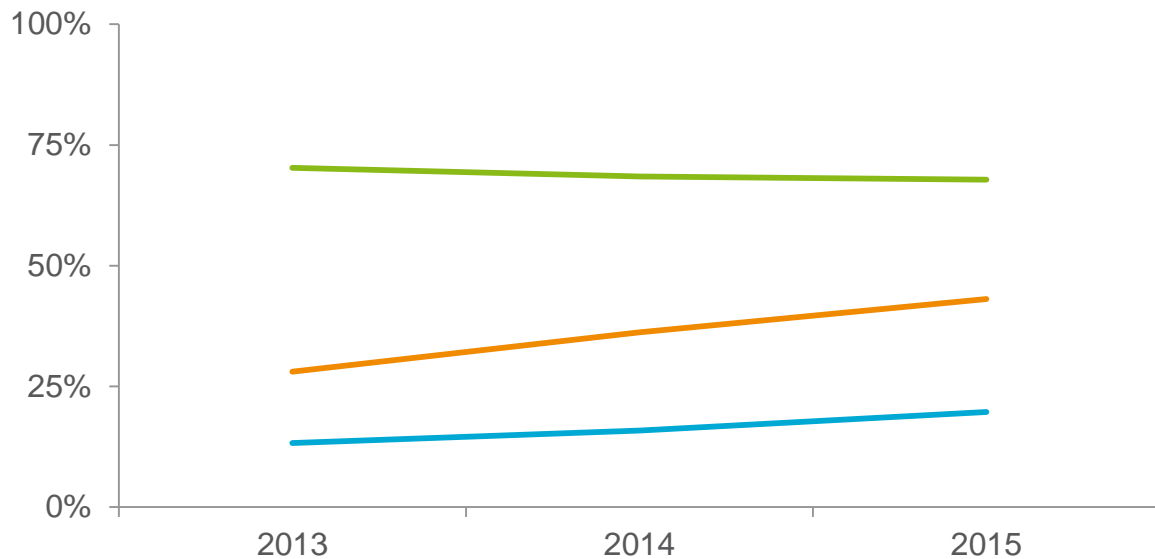
2015

# DAILY MEDIA HABITS



Percentage of people watching different media types at least once per day (self reported frequency of viewing)

- Scheduled linear TV
- Streamed on demand video (YouTube, short clips, movies, TV series and programs)
- Recorded linear TV



~45%  
watch streamed  
on-demand  
each day -  
almost a doubling  
compared to 2013



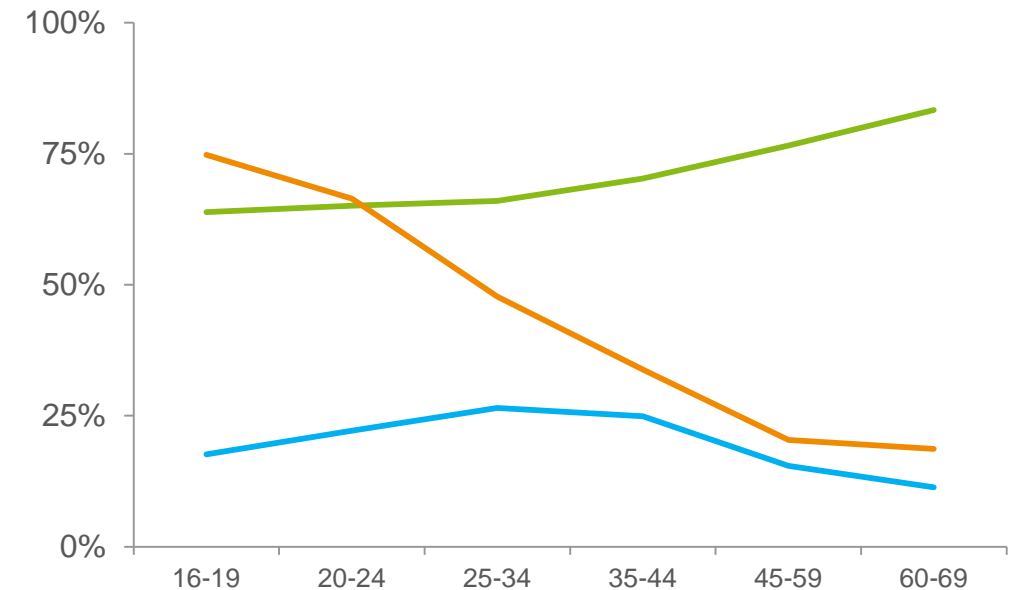
# DAILY MEDIA HABITS DIFFER WITH AGE



- › More than 7 out of 10 teenagers state they watch streamed on demand TV and video content at least once per day, compared to less than 2 out of 10 amongst those aged 60-69
- › Inversely, the daily habit of watching scheduled linear TV is significantly overrepresented in the older age groups, with more than 8 out of 10 amongst those aged 60-69 watch it at least daily, compared to roughly 6 out of 10 teenagers
- › Daily viewing of recorded linear TV is over represented in the 25-44 age groups

Percentage of people watching different media types at least once per day by age (self reported frequency of viewing)

- Scheduled linear TV
- Streamed on demand video (YouTube, short clips, movies, TV series and programs)
- Recorded linear TV



BASE: Population aged 16-69 with broadband at home who watch any type of TV/Video at least weekly in France  
[Showing: Use once per day or more]

Source: Ericsson ConsumerLab TV & Media 2015 Study

# S-VOD SERVICES DRIVE BINGE VIEWING

Although bingeing has been possible for a long time, e.g. by purchasing DVD boxes with entire TV series seasons, only with the advent of S-VOD services that enable easy bingeing at an affordable cost, has it become mainstream

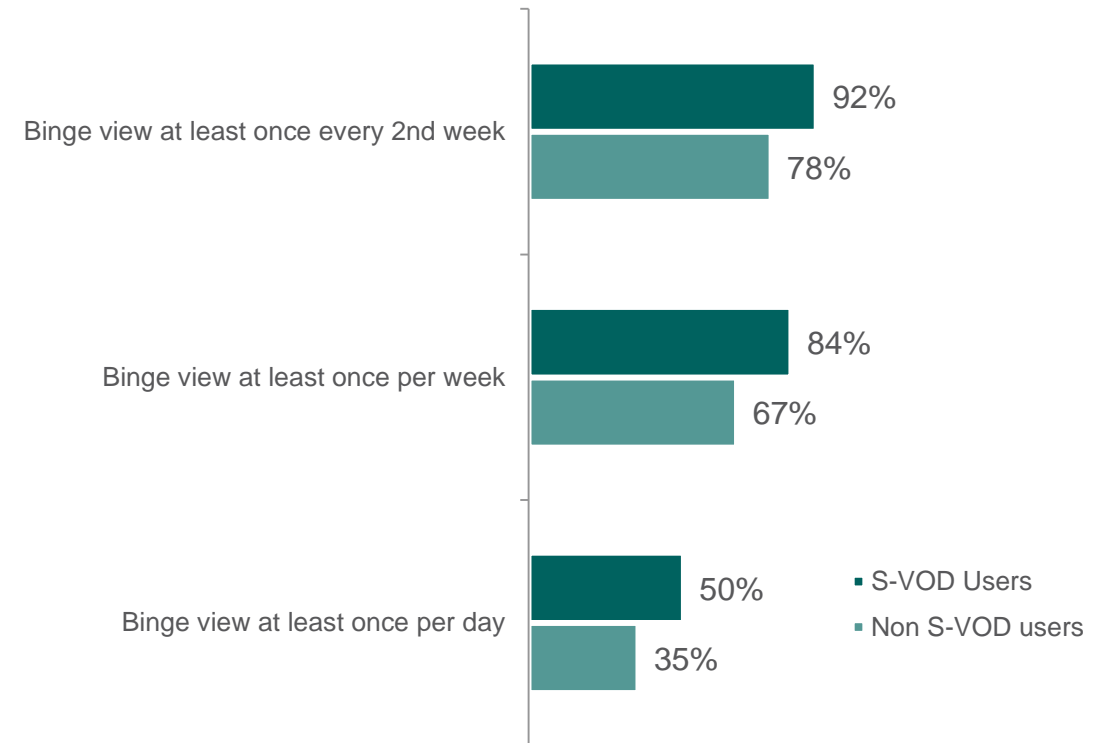
~85%  
of S-VOD  
users binge  
view at least  
once per week,  
compared to  
>65% of non-  
SVOD users



~40%  
binge daily  
  
>5%  
never binge



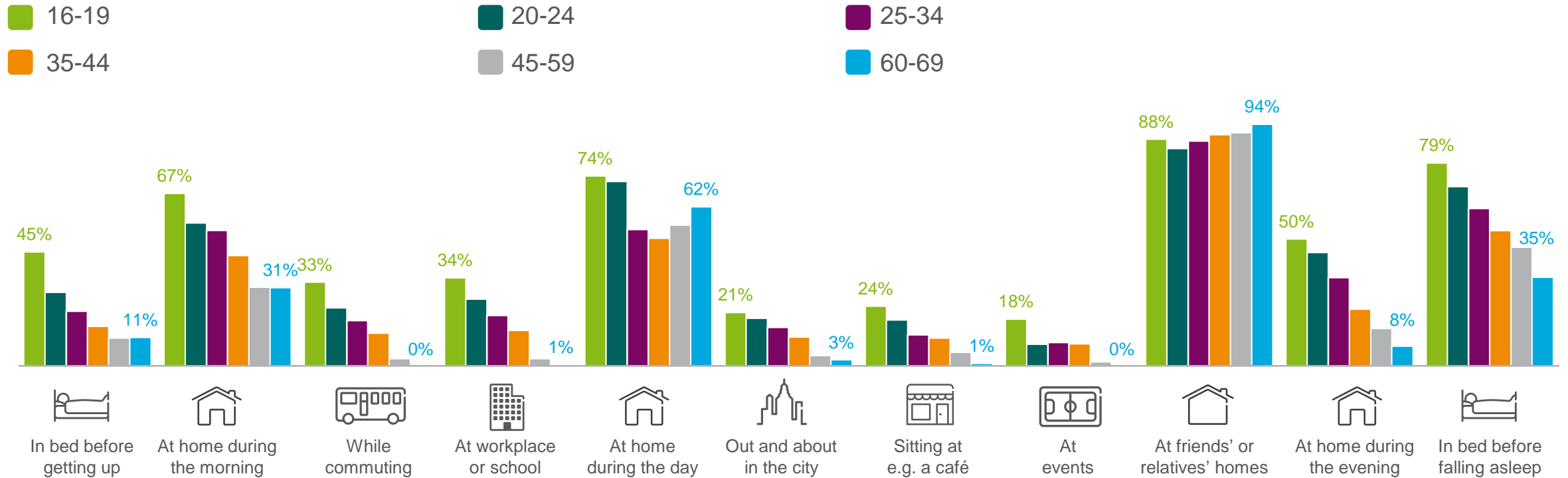
Self reported frequency of watching several TV series, other TV programs or user generated content (UGC) episodes in a row (so called binge viewing)



BASE: Population aged 16-59 with broadband at home who watch any type of TV/video at least weekly in France  
Source: Ericsson ConsumerLab TV & Media 2015 Study



# WEEKLY VIEWING SITUATIONS

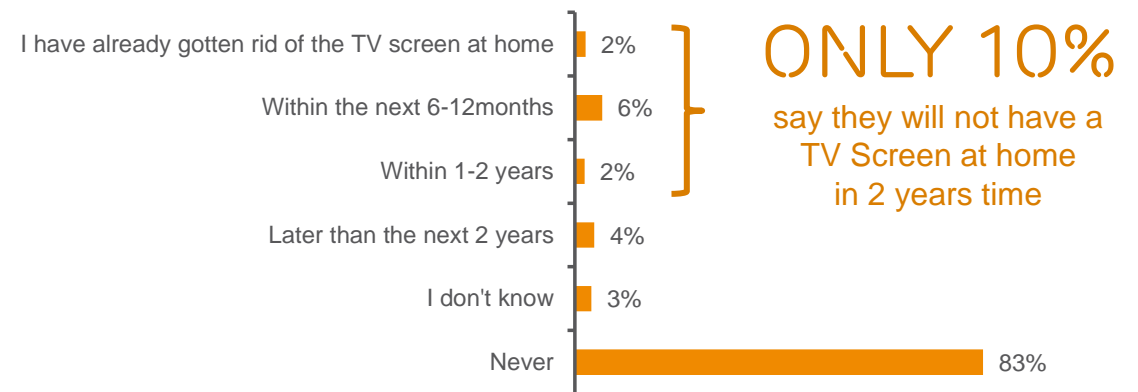


# THE HOME TV IS NOT GOING ANYWHERE

- › The big screen TV has become a versatile screen, used also for showing photos, playing games and listening to music
- › Consumers prefer to view certain types of TV and video content on the primary big TV screen
- › These preferences remain, regardless of the source of the content, be it linear TV or on-demand video



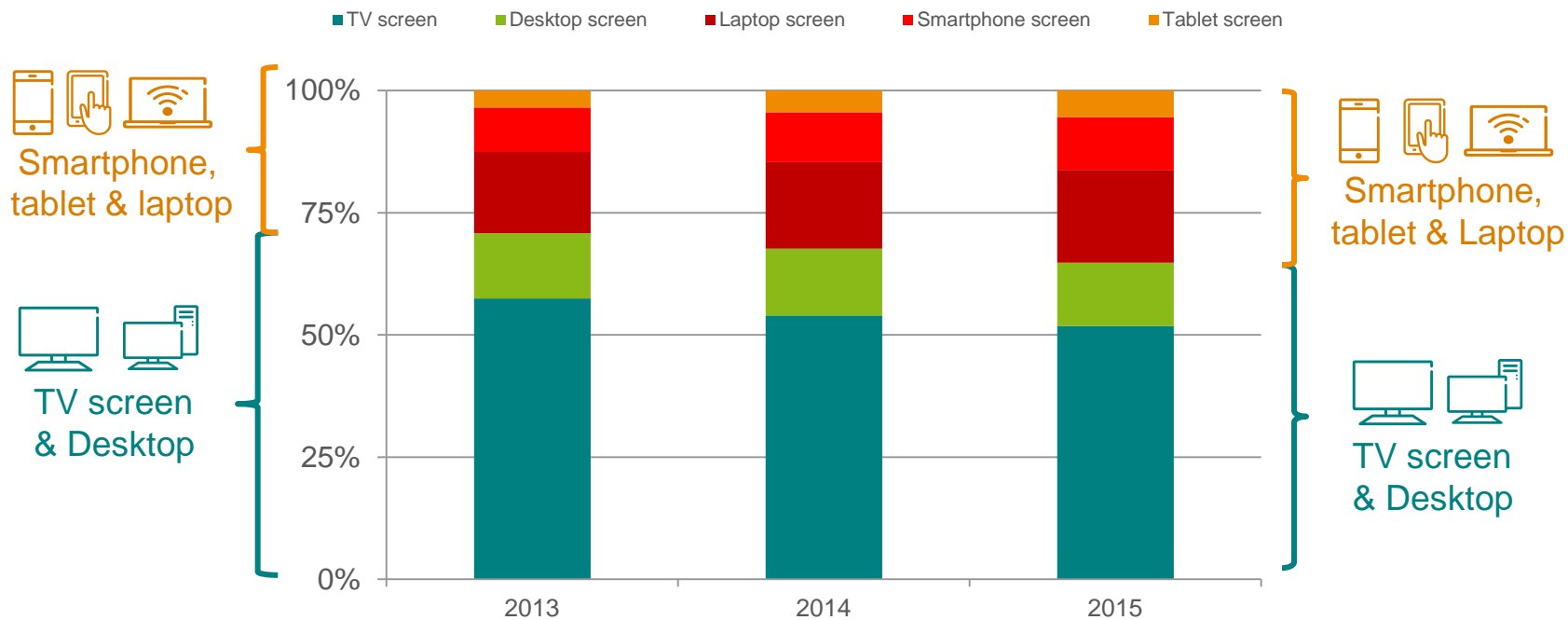
Future plans to get rid of the TV screen at home



# A SHIFT FROM FIXED TO MOBILE VIEWING



Share of estimated total weekly TV/video viewing time, per year, done on respective device \*\*



>45%

of consumers watch TV & video on their smartphones – an increase of >35% since 2013



>30%

think it is very important to watch their TV and Video content wherever they are

# THE VALUE OF PERSONAL DATA

1 IN 2

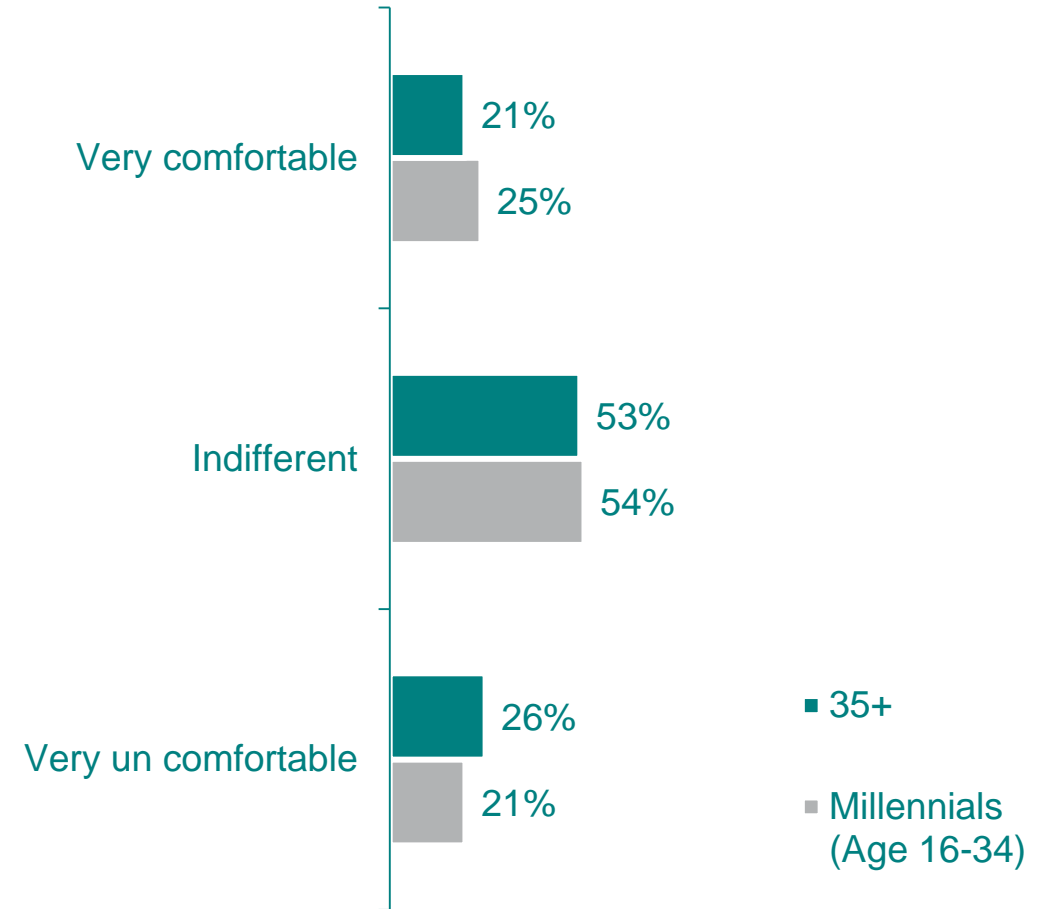
consumers trust that their current TV service provider handles their personal data securely and responsibly



Millennials have the highest acceptance to providing personal information to improve recommendations



Self-reported percentage of consumers in levels of comfort in having their devices tracking information about their behaviors and preferences in order to improve upon the viewing experience:





# NEED FOR TECH UPGRADE



When it came to the streaming experience, the families felt an immediate need for an upgrade of their technology infrastructure at home.

Want better broadband connection

Want an internet connected TV

Want more tablets

Want additional services



We had the technical glitches, but we didn't realize – well, we were able to figure out what rooms or what area of the house has good Wifi, see what it's really weak in. And then where are areas where certain apps work the best and work the worst at”

- Sheryl, 39 years, USA

Consumers that have cut their managed TV service are **the least satisfied** with the stability and speed of their home network, which drives a willingness to pay for better broadband!

BASE: Population aged 16-59 with broadband at home who watch any type of TV/Video at least weekly in Brazil, Canada, China, Colombia, France, Germany, Greece, Ireland, Italy, Mexico, Portugal, Russia, Spain, South Korea, Sweden, Taiwan, Turkey, UK, Ukraine, US

Source: Ericsson ConsumerLab TV & Media 2015 Study

# IMPORTANCE OF QUALITY



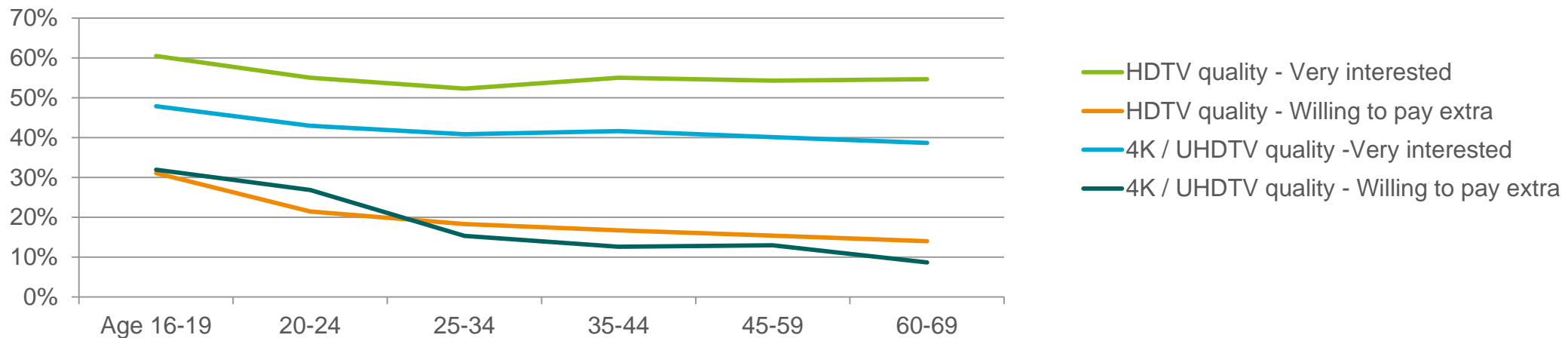
## HD QUALITY



## UHD QUALITY



Percentage of consumers stating that HD and UHD quality is very important and worth paying extra for, by age [self-reported]:



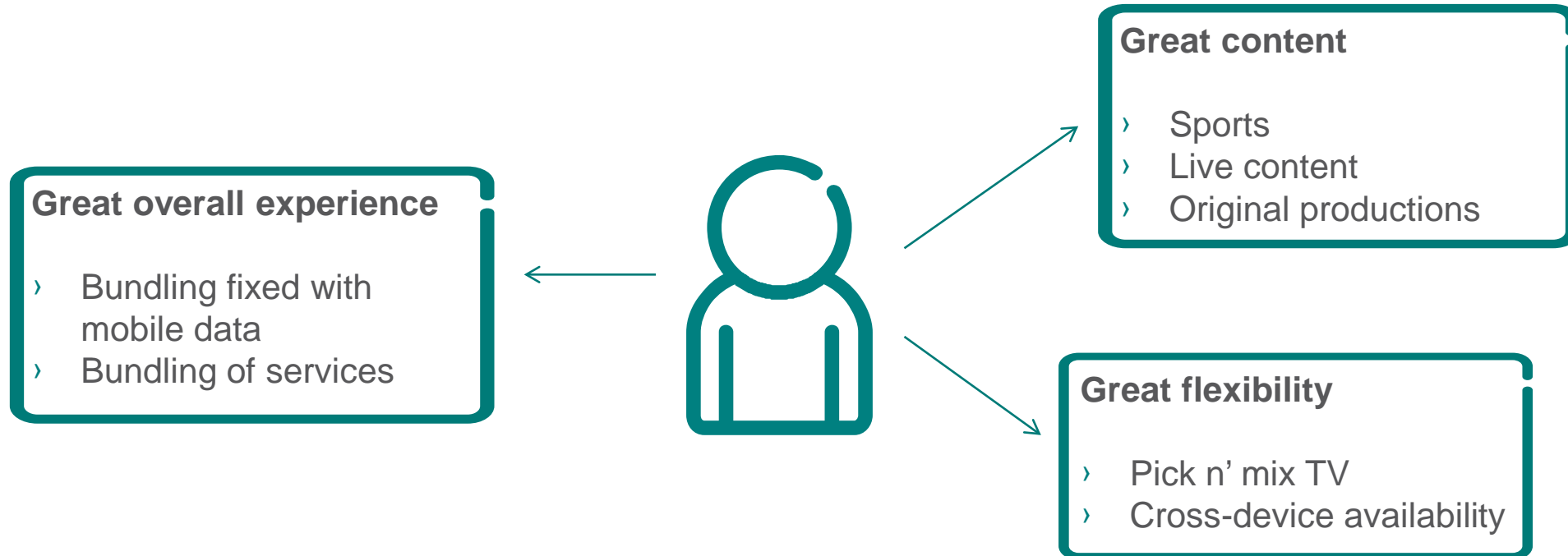
BASE: Population aged 16-59 with broadband at home who watch any type of TV/Video at least weekly in France  
 [Interest, top 2 answers on 7-graded scale and willingness to pay]

Source: Ericsson ConsumerLab TV & Media 2015 Study

# CONSUMER EXPECTATIONS



To meet the needs and expectations of consumer today, there are three specific areas that have strong influences on the service experience for the consumers. Aspects such as aggregating and offering content at the convenience of the consumer, creating flexible offerings and packages as well as focusing on providing high quality content.

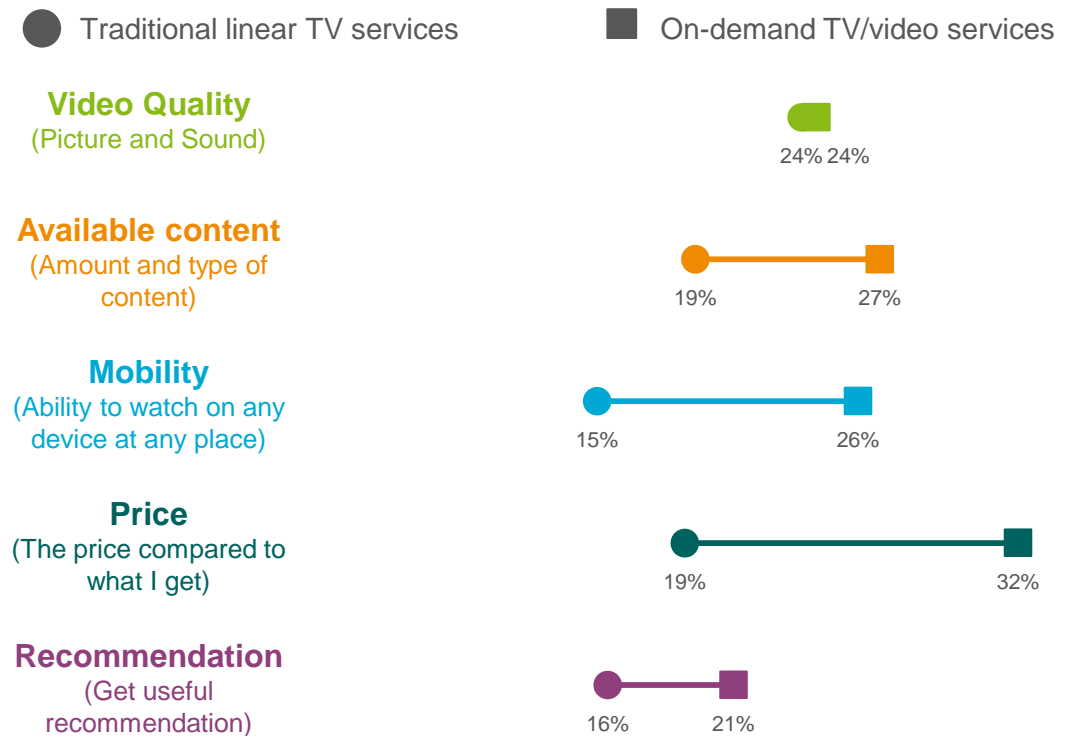


# SATISFACTION WITH ASPECTS OF TV



- › The levels of satisfaction with the on-demand TV/Video services is higher across 4 out of the 5 aspects that were studied
- › On-demand services leads in price, mobility, available content and recommendation capabilities
- › Only video quality of traditional services is perceived to be on the same level as On-demand TV/Video services

Satisfaction with video quality, available content, mobility, price and recommendation amongst those who use it - Anonymized distribution for the France market



BASE: France population aged 16-59 with broadband at home who watch any type of TV/Video at least weekly [Current users of each service]

Source: Ericsson ConsumerLab TV & Media 2015 Study



# TRADITIONAL MANAGED TV VS ON-DEMAND TV -FRANCE



Consumer evacuation of content providers

● Traditional linear TV providers

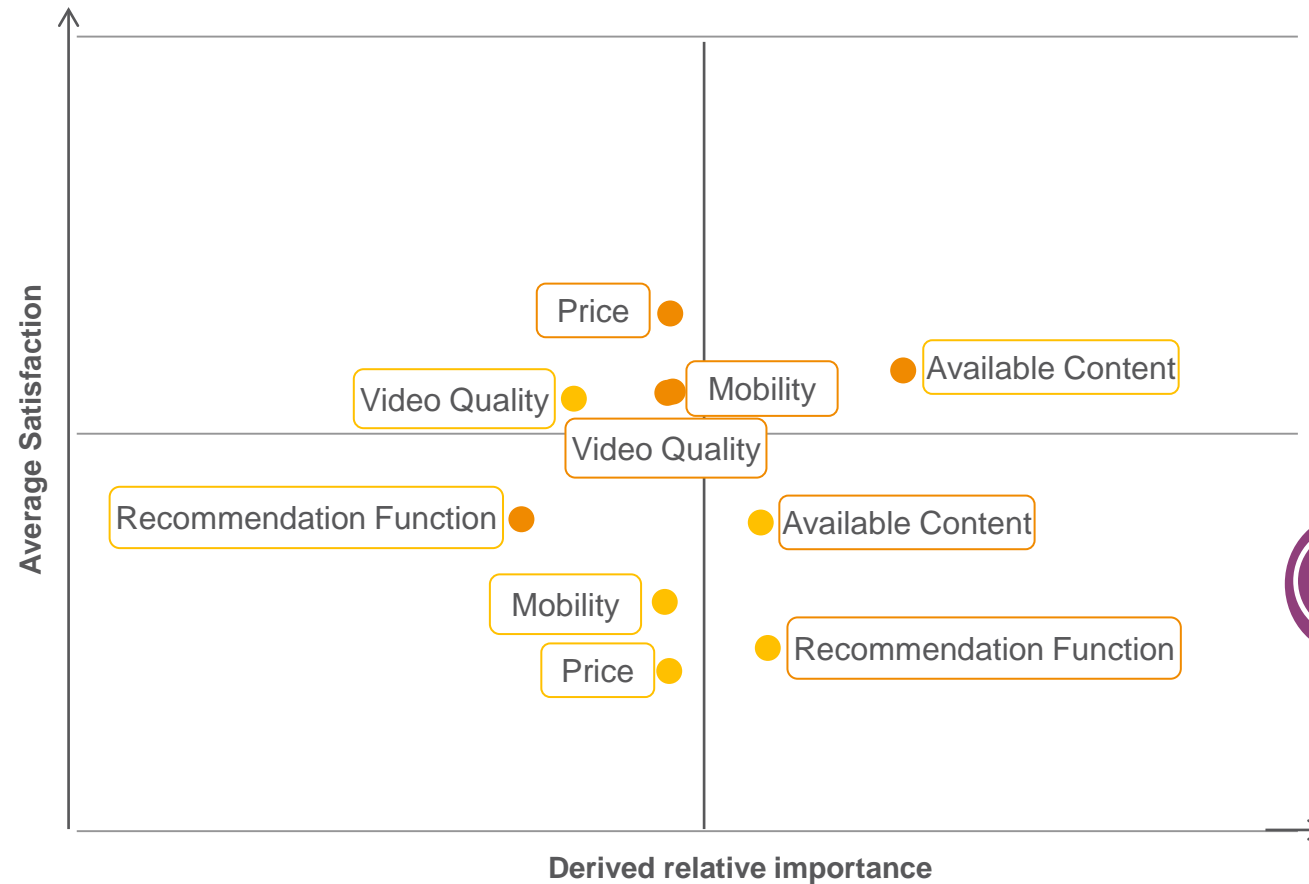
● On-demand services

**Maintain**

Aspects that satisfy the consumer and should continue to be supported

**Monitor**

Less important aspects that need to be monitored  
In case they increase  
In importance



**Reinforce**

Highly important aspects to the experience, and are the most satisfactory

**Fix**

Highly important aspects that are not satisfactory and need immediate improvement

BASE: Population aged 16-59 with broadband at home who watch any type of TV/Video at least weekly in France

Source: Ericsson ConsumerLab TV & Media 2015 Study



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