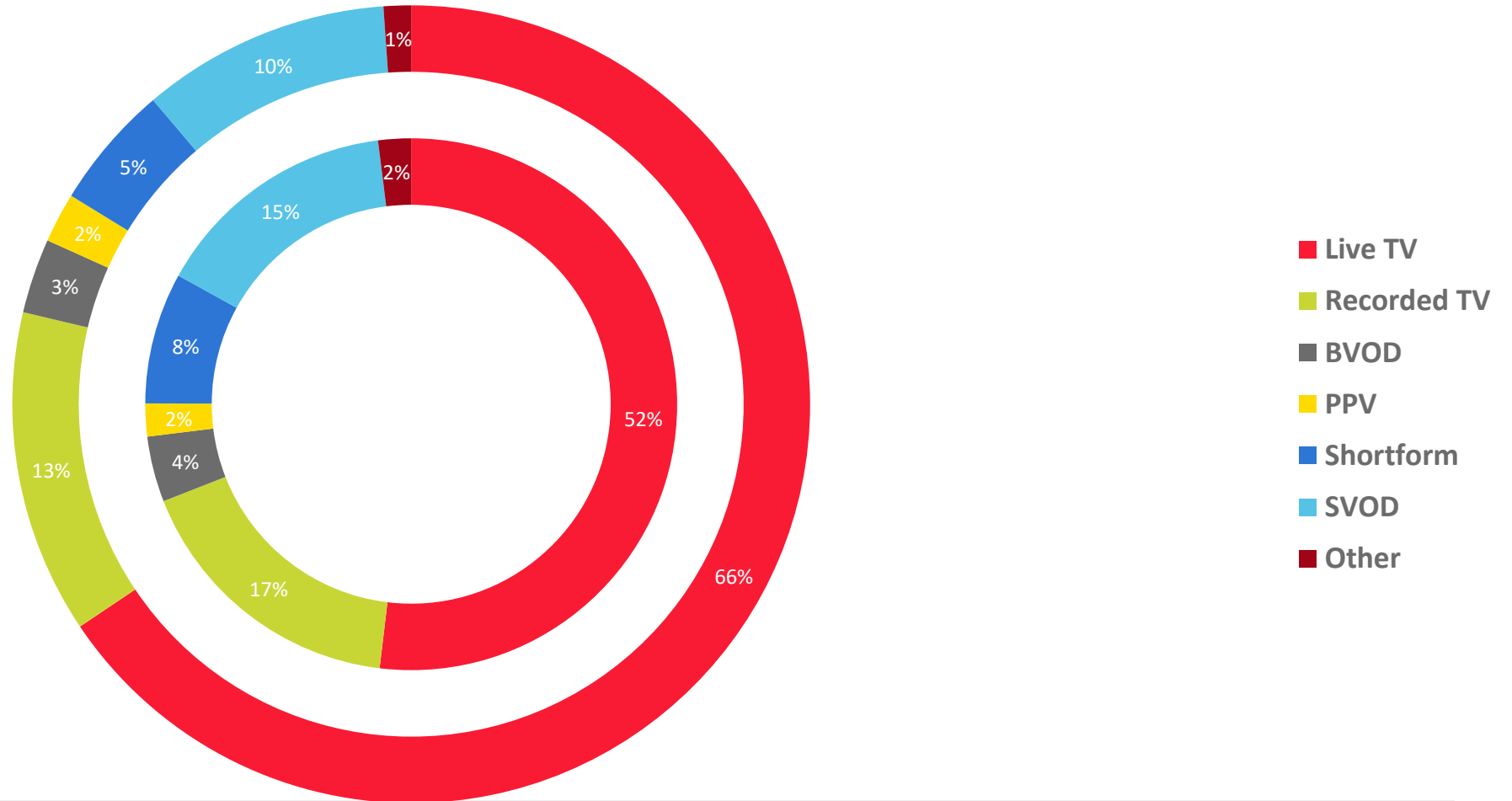


TV is at the heart of a video world

- All TV is video, but all video is NOT TV
- Don't assume one form of video is a substitute for another – they are not all equivalents
- People want quality content and TV programmes are the highest quality video content
- Broadcasters are putting immense effort and investment into helping people watch TV differently
- Time spent with different forms of video is important to know but advertisers should care most about time spent with different forms of video advertising.

TV is at the heart of a video world

TV accounts
for 80% of
our video day



TV is at the heart of a video world

- One key thing to remember when considering the video world is that newer forms of video are not necessarily substitutes for TV.
- The proliferation of content and ease of availability across platforms means that all forms of video coexist in harmony but each has now been liberated to do what it does best. Our Needstates research detangled the role that video plays in our lives to determine how the different video formats coexist and why viewers choose to invest their time in a range of video platforms.