

CULTURE OF *streaming*



volume 1



INTRODUCTION

The Evolving Content Streaming Landscape

Audiences today are not viewers but explorers, expert at shaping their personal digital spaces. They discover, filter, replay, and share like never before, curating and disseminating the world in their image. They make active choices and try out new tools. And with this god-like power over the content they stream comes great flexibility: individuals are free to carve their own paths through an ever-expanding slew of options, including which platforms they subscribe to and what devices they use to tune in.



In this evolving streaming landscape, content is all about personal control. Asynchronous viewing patterns allow people to stream what they want, when they want it—and this has only accelerated during the COVID-19 stay-at-home orders.

30%

**of American adults watched TV
while they were supposed to
be working from home.**



*"Things were slow at work
and I had the time to sneak
in an episode. It made me
feel great."*

-- Male, 48 / Maryland



Streaming content allows people to assert control in small but meaningful ways, taking breaks from “reality” to lean into pleasure and feeling. They can fast-forward to key scenes of favorite shows, or rewind to experience moments again. They can binge thrillers for hours to pump up their adrenaline, or tune into soothing programs to calm their minds. They can sing along to *Carpool Karaoke* and learn dance steps for their next TikTok video, fulfilling their creative fantasies. Stories, whether real or fictional, become reliable resources, available at our fingertips whenever we need them.



*Carpool Karaoke with Michelle Obama



*Carpool Karaoke with Elton John & James Corden

We use stories to build shared understandings of the world around us, turning our love of particular character arcs into life lessons and passionate connections. Content inspires relationships. It brings together fan communities through IRL activations and deep Reddit sub-threads, and audiences build out narrative worlds in collaborative feats of imagination.

“

“People use content for the same reason they ride roller coasters — it’s a strong emotional experience you can control.”

-- Peter G. Stromberg,
professor of anthropology
at the University of Tulsa
and author of *Caught in Play*



*Big Brother Live Feed



*Survivor Trivia & Viewing Parties

ViacomCBS' streaming platforms allow viewers to build their own content lineup without losing the ability to tune into the culturally defining moments of live and linear TV—and many say they miss those water cooler moments.

71%

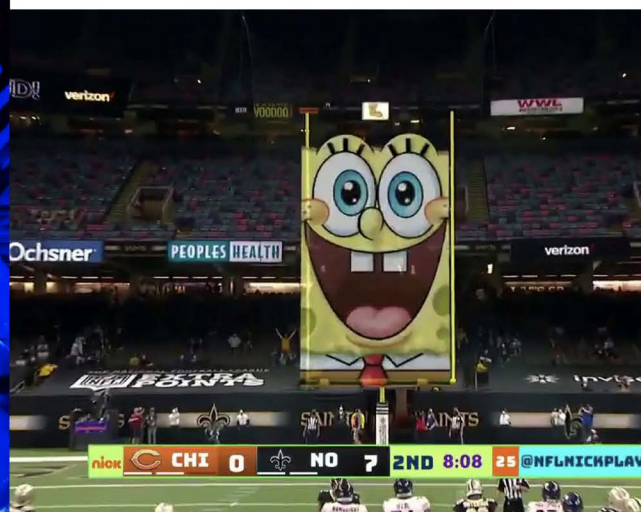
say they've been excited to talk with someone about something they watched but couldn't because the person hadn't watched it yet.



*Lady Gaga at the MTV VMAs



*The Weeknd at the Super Bowl



*NFL on Nickelodeon

The desire for content-based connections can further elevate the excitement behind must-see events, whether that's a tentpole entertainment event like the MTV VMAs, an up-to-the-minute breaking news feed, or a sports game broadcast from the other side of the world. Sometimes, people's relationship with content itself becomes the ultimate connection, an ongoing love story between humans and the stories that animate their worlds. At times, beloved programs become so important that people are willing to sacrifice their everyday needs just to get that content fix.

HOW MUCH WILL FANS SACRIFICE TO GET THEIR CONTENT FIX?

We're so committed to content that if threatened with missing our favorite show's finale, many of us would pay a shocking price to watch it. Fans would give up:



Today's audiences are undoubtedly passionate, ready to go to great lengths to access the content they love. These passionate fans are extra tuned-in to both their favorite shows and the advertisers seeking their attention. Advertisers who can find these highly engaged audiences, connected to culture-defining content, have the opportunity to turn passive consumers into brand fans.

TABLE OF CONTENTS

On-demand content is not just a way to pass the time—it is a library of feelings, a container for play in which we explore our fantasies and craft our identities. Our journeys through content are like fingerprints, but more malleable; they reflect what makes each of us unique, even reveal our hidden selves: who we are now, and who we want to be. This level of intimacy collapses the space between advertisers and their audiences, especially in the hyper-personalized spaces of digital video. Like streaming media, ads travel through the portals that shape our identities and connect our worlds. This changing landscape of streaming content creates new rules for media planning, helping planners bring fans together, inspire self-exploration, and connect audiences with the content they love.

Chapter 1:

BORDERLESS IDENTITIES

The explosion of streaming content, personalized algorithms, and accessible media has opened up the gates for private, identity-driven exploration.

*New Rules of Media Planning:
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LIBRARY FOR LIVING

We look to content to help us find meaning, regulate emotions, and guide new areas of personal growth.

*New Rules of Media Planning:
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INTIMATE SCREENS

The content we collectively consume enables us to feel a sense of belonging—and, sometimes, obsession.

*New Rules of Media Planning:
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Chapter 4:

VIACOMCBS EyeQ

The streaming revolution has undoubtedly shaped the ways audiences connect with content. ViacomCBS EyeQ allows planners to be where the audience is, however eclectic, unexpected, and varied their navigation of content might be.

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Chapter 1:

BORDERLESS IDENTITIES

The explosion of streaming content, personalized algorithms, and accessible media has opened up the gates for private, identity-driven exploration. Content serves as a window, giving people the tools to bust open the silos and tribes that have surrounded our lives. **Today, audiences can use content to fuel their changing worldviews, complementing their journeys through hyper-fragmented online subcultures.**

FROM MASS CULTURE TO UNRESTRICTED IDENTITIES

Instant access to more ideas, characters, and worlds than one could ever consume in a lifetime has created audiences that are able to construct their identities from thousands of disparate pieces. Where once there were mass trends, digital flexibility is leading to positive fragmentation, allowing each of us to continually shape our identities in response to a changing world and in the pursuit of personal growth. From cross-industry mash-ups to the proliferation of online identities and evolving viral trends, outward manifestations reflect inward journeys of self-discovery, resulting in surprising contradictions and a malleable understanding of self.

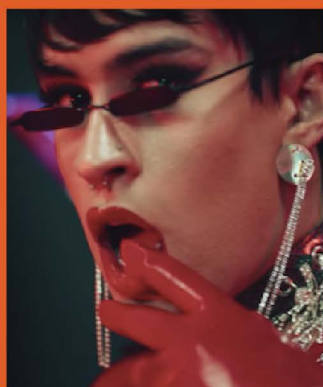


Exploring Identity in Virtual Space

Across popular games like *Animal Crossing*, *Pokémon Go*, and *Fortnite*, customizable avatars give individuals the opportunity to style themselves in unique ways, whether by donning high-fashion looks from brands like Gucci and Net-a-Porter, or by changing their skin colors and hairstyles to match their IRL personas. These virtual avatars can open up portals into spectacular new worlds, allowing gamers to explore the farthest reaches of their imaginations.

Bad Bunny Breaks Barriers

In his video for *Yo Perreo Sola*, Latin trap artist Bad Bunny explores his female side by styling himself in drag. The song—which calls for respect for women in a musical genre that tends to objectify them—is written from a female perspective. “I wanted a woman’s voice to sing it,” says Bad Bunny, “But I do feel like that woman sometimes.”

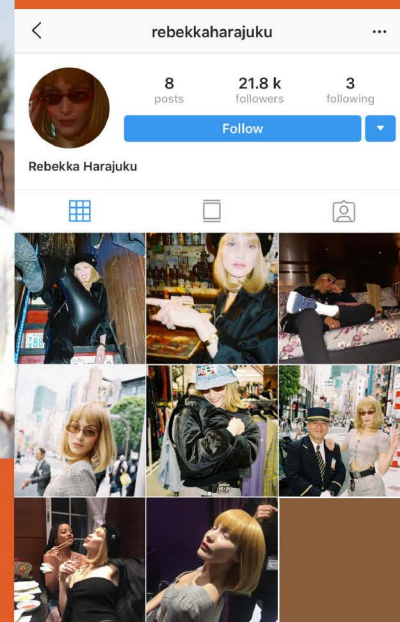


Lil Nas X Creates Genre-Bending Music

Country rap sensation Lil Nas X has forever cemented a new genre in our musical culture, collaborating with artist Billy Ray Cyrus on the chart-topping hit *Old Town Road*. Since skyrocketing from TikTok fame, the young rapper has become the first LGBTQ+ artist to win a Country Music Association Award.

Blending Beauty with Gaming

Beauty brand e.l.f. collaborated with Twitch star Loserfruit to connect with gamers who love makeup, and shine a light on underrecognized female gamers. e.l.f. is dedicated to reaching consumers through cross-industry mashups, allowing them to target growing cultural communities in untapped spaces.



Fake Instagrams for your True Identity

When public Instagram profiles feel too manicured, young people create “finstas”—fake Instagram accounts—that allow them to perform their more authentic selves for smaller, handpicked audiences. As digital identities get fragmented across platforms, individuals can choose what to share on which accounts, building tailored profiles for their multifaceted selves.

YOU'LL NEVER GUESS WHAT PEOPLE WATCH BY LOOKING AT THEM

People are full of surprises, especially in a world that supports their continually expanding interests. This means that audiences are not quite as predictable as media planners might think.

41%

of American adults say that there's a show, movie, or online video that they love to watch that a stranger would find surprising or funny because of how their life appears on the outside.



“

“This idea of identity is going through a transformation. In the past, we defined identity by every aspect of our being: our clothes, the shows we watch, our job, our hobbies. Everything had to make sense and be synonymous. But now we’re leaning into the idea that the image you present doesn’t have to encompass your full identity.”

-- Julia Alexander, Streaming & Entertainment Reporter, *The Verge*

Tastes aren’t strictly defined by age, gender identity, or even personal passions—and this can lead to unexpected compositions of streaming audiences. **While 56% of grandmas enjoy action and adventure films, 30% of active MMA fighters and boxers are drawn to intense historical dramas.** Moms who watch *Bellator* are just as likely to tune into *Ridiculousness* as they are to watch reruns of *The Office* on Comedy Central. Animated shows might be made for young people, but age is merely a state of mind: **more than a quarter of grandpas like watching *South Park*, and teens who’ve aged out of cartoons still watch *Spongebob Squarepants*.**

When 51% of bikers claim to enjoy *Golden Girls* and 36% of “very masculine” people sing along with musicals, it’s time to abandon assumptions about people’s watching patterns and get to know your audience’s quirks.

“

“I enjoy little kid shows which would surprise people because I seem very sophisticated and mature.”

-- Female, 34 / Virginia

“

*“I know a Baptist minister who loves *South Park*.”*

-- Male, 53 / Virginia

PEOPLE ARE CRAFTING NEW IDENTITIES BASED ON THEIR FAVORITE SHOWS

Role-play is not just for Live Action Role Players (aka LARPer)s, actors, or the kink-positive. People of all stripes are inspired by the media they consume to feel the fantasy of their favorite worlds. They might try out a new hairstyle, use one of *RuPaul's* famous catchphrases, or, like dedicated *Star Trek* fans, learn an entire new language.

him: call me by your name
me:



Despite being eliminated so quickly in season 10 of *RuPaul's Drag Race*, Miss Vanessa Vanjie Mateo became an internet sensation and viral meme with the iconic echoing of "Miss Vanjie, Miss Vanjie, Miss Vaaaaanjie" on the catwalk.



OnThisDayENT
@OnThisDayENT

2021- the year we normalize Moira Rose's pronunciation of 'baby.'

10:36 AM · 12/31/20 · Twitter for iPhone

Inspired by *Schitt's Creek's* Moira Rose, 2021 will be accepting both baby and bebé.



As real and fantasy worlds intersect, parents reprimand their children in Klingon.

39%

of American adults have gotten so obsessed with a TV show that they felt like it consumed their whole identity for a period of time.

This comes out to roughly 85 million American adults—more than the largest number of votes cast for a single presidential candidate!

Sometimes love for content can radically shift someone's identity. Whether this looks like repping the *Jersey Shore*, embracing their inner nerds like the scientists of the *Big Bang Theory*, or adopting the extravagant stylings of *Schitt's Creek's* Moira Rose, people are incorporating aspects of the shows they watch into their ever-morphing identities, and having fun while they do it.



A miniature David and Moira Rose bring *Schitt's Creek* styling to people of all ages.

Embracing their inner and outer Moira Rose, this person took to the farm to get the perfect shot.



"Very uninterested in that opinion."
-- David Rose, and probably this person

“

"I started watching *Survivor* long after the show aired (this year) and I began incorporating common words or statements from the show during conversations with family and friends."

-- Female, 34 / Virginia

“

"Yellowstone...I was so obsessed to a point where I started thinking and acting like them lol."

-- Female, 25 / Florida

Rule:

1



REFOCUS TARGETING FOR BORDERLESS IDENTITIES

In a world where bikers love *Golden Girls* and grandmas enjoy action films, it's clear that targeting can no longer be predicted by demographics alone. Broad demo targeting today should be mixed with advanced targeting that allows advertisers to find ROI in less obvious places—both to find your audiences and outwit your competitors. Used together with an understanding of your audience's less predictable watching patterns, broad demo and advanced targeting create the incremental gains in media performance that planners are hungry for.

“

"Media planners are missing so many creative targeting opportunities by being locked in our traditional assumptions [about who people are, where to find them and what they consume]."

-- Media Planner / NYC Metro Area

“

"There can be more of an art to media planning that involves identifying growing pockets of audiences in unexpected places."

-- Media Planner / NYC Metro Area



Chapter 2:

LIBRARY FOR LIVING

Content has always served as a portal into another world. But while passive viewing was once the norm, audiences now look for more purpose in the content they consume. TV shows have joined books and archival materials as manuals for how we want to live. **Indeed, we look to content to help us find meaning, regulate emotions, and guide new areas of personal growth.**

FROM PASSIVE VIEWING TO THERAPEUTIC CONTENT

With information traveling at hyperspeed to the screens around us, purposefully chosen content offers private ways for people to slow down and reconnect with themselves. On-demand content provides audiences an accessible way to process emotions, revel in beauty, or encounter mind-stretching adventures in a safe and predictable way. Content becomes part of a self-care toolkit, an emotional and sensory palette that gives audiences a feeling of comfort and control in a fast-paced, complex world.



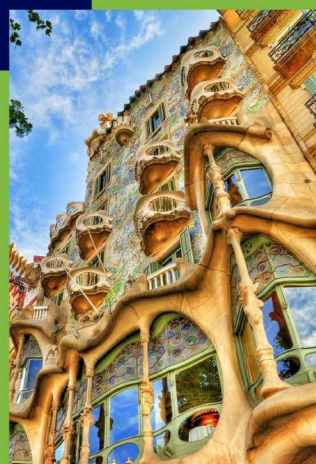
Anxiety Pop for Self-Soothing

Musicians like Billie Eilish, Rina Sawayama, and Kim Petras are part of a wave of young artists making "shiny pop songs about ambient dread," highlighting the emotional reality of being alive during dire times and providing a musical balm to soothe their anxious fans.



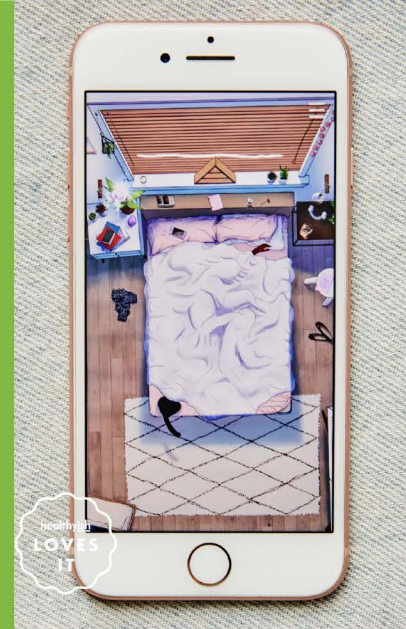
Finally, Some Good News

In the midst of a global pandemic, audiences across the country tuned into John Krasinski's *Some Good News*, a YouTube show featuring uplifting stories to help people through an emotionally challenging year.



Armchair Travel

From travel and nature documentaries to virtual museum and architectural tours, video provides would-be travelers with the exploration they crave from the comfort of their homes.



Mindful Gaming

While video games are often associated with violence and competition, gaming is now venturing into unexpected territory: encouraging self-care. Purpose-driven games like BuzzFeed's *Run Boggo Run!* emphasize the importance of friendship in defeating anxiety and stress, and the *#SelfCare* mobile app lets players drop into a virtual bedroom and enjoy calming activities that center relaxation over winning.



Burger King Gets Real

In an attempt to connect with people's various emotional states, Burger King debuted its "Unhappy Meals" to deliver an important message about mental health: that nobody is happy all the time, and their food can provide an excellent companion whether you're feeling blue or you DGAF.

PEOPLE CHOOSE WHAT THEY WATCH TO REGULATE THEIR EMOTIONS

If a good therapist is hard to find, quality content is more accessible. When people are looking for help with their emotional and mental health, they often turn to TV.

Shows are doorways to different emotional states: **67% of people watched something to put themselves in a different mood.** Audiences

rely on content to elate, alarm, soothe, inspire, or empathize. In

moments of emotional blockage, **33% say a show has helped them have a good cry.** And because of the emotive power of televisual narratives, people sometimes need to get into the right zone—leaning into levity for an episode of *Nora from Queens*, or getting serious for *The Good Wife*. **55% have actually waited to watch something until they were in a mood that matched what they were watching.**

50%

of Americans have used a show, movie, or online video as a form of therapy.

“

“That is the power of television and pop culture: no matter if you want to feel good or you want to stew there is something that will help you do that.”

-- Julia Alexander, Streaming & Entertainment Reporter, *The Verge*



“

“Recently I started watching Star Trek: The Original Series to combat depression.

-- Male, 39 / Texas

“

“I began watching The Good Wife while I was going through a very difficult period in my life. Watching it became a therapy for me because it allowed me to temporarily step away from my life.”

-- Female, 70 / Tennessee

At other times, content directly relates to people's off-screen lives. Maybe they're encountering a stressful work situation, or recently got ghosted by a date; maybe they're getting involved in political movements, or learning how to become more confident. A quarter of Americans say that a show has helped them understand a problem in their life. In this way, content can be a mood-regulator, emotional doula, and teacher.

AUDIENCES USE TV SHOWS TO FUEL SELF-IMPROVEMENT

Empowered audiences across the country find themselves on paths toward self-actualization, and the media they consume can guide them along the way. Popular Massive Open Online Course platforms and self-help podcasts are part of a larger content ecosystem built to teach and inspire, but inspiration can also come from wide-ranging corners of the streaming sphere.

28%

of Americans claim that a TV show has already helped them become a better person.



“

“My father traces his whole system of morality back to a single TV show: Star Trek.”

-- Female, 28 / Illinois

“

“Because of NCIS I started studying law.”

-- Male, 30 / Florida

*Mallorca



*Love Island



TV shows can help people discover new avenues for exploration. For instance, **29% say a show inspired them to try a new activity or hobby.** Others report that shows motivated them to learn about other cultures, or travel somewhere new. **Mallorca has seen a 23% increase in British tourism since the release of Love Island, directly fueling exploration—and driving local econo-**

¹Travel Weekly, “Love Island casues Majorca flight surge,” July 2017.

Self-improvement isn't always glamorous, and improvement-oriented content can have wide-ranging positive effects, including on public health outcomes. ViacomCBS shows like *16 and Recovering* model paths for young people dealing with addiction, offering strategies and support systems for people looking to change their lives. **Self-improvement is a lifelong process, and researchers found that *16 and Pregnant* ultimately led to a 5.7% reduction in teen births in the 18 months after its premiere.**

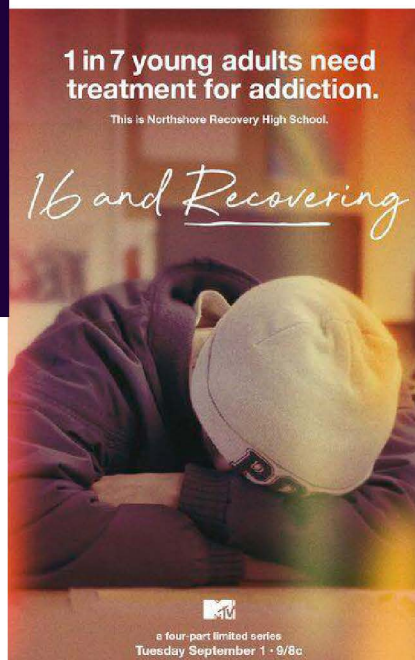
36%

say a TV show gave them an idea of how to respond to a real life situation.

“

“I watched a TV show because it dealt with something that had happened to me in the past. It made me deal with something I had not dealt with for nearly 40 years after it happened.”

-- Female, 60 / Oregon



“

“People want a social message — something to think about more critically from their content. We are learning something about our culture from TV and that is pretty powerful.”

-- Cat Zhang, Culture & Technology Writer, Pitchfork

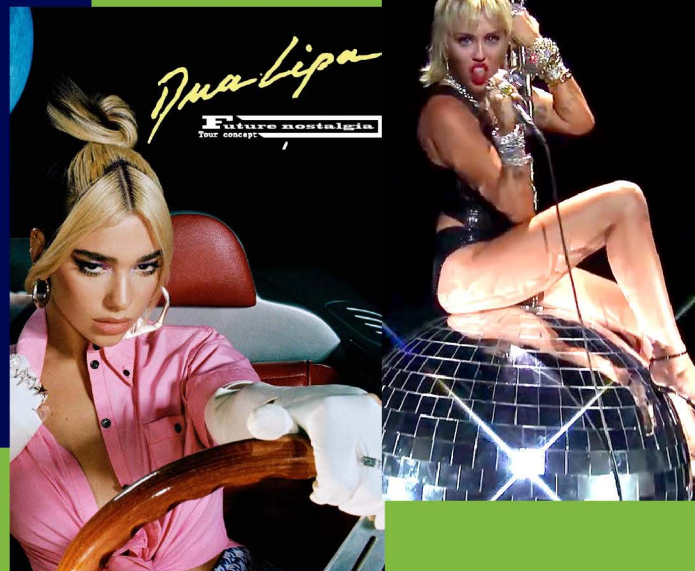
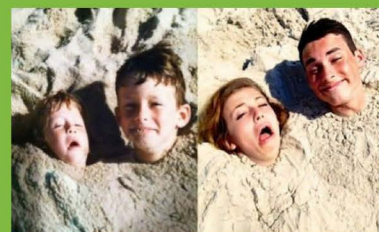
²National Bureau of Economic Research, “Media Influences on Social Outcomes: The Impact of MTV’s *16 and Pregnant* on Teen Childbearing,” August 2015.

FROM FIRSTHAND TO SECONDHAND NOSTALGIA

Nostalgia has long shaped our media, evoking bittersweet memories and familiar feelings. As the archives of content have opened up, audiences find themselves yearning not only for their own pasts, but also for the pasts of previous generations. Once popular shows resurface in reboots and syndicated streams, allowing culture and content from our televisual history to be reanimated in a new context. Anchoring ourselves in the past allows for cultural grounding in an increasingly unpredictable world.

Recreating Childhood Memories

Nostalgia is high on TikTok, where challenges like #imjustakid, which called people to recreate childhood photos, garnered over 2.1B views.



Disco Gen Z

Disco is back, officially. Pop stars like Miley Cyrus, Dua Lipa, and BTS brought disco stylings into their hit 2020 songs, while young people on TikTok revelled in the return of the rollerskate, posting videos of themselves skating through tree-lined suburban streets in this combination of 70s aesthetics and pandemic-friendly exercise.



Doggface Revives “Dreams”

Viral TikTok sensation @420doggface208, aka Nathan Apodaca, rose to fame by skateboarding to Fleetwood Mac’s 1977 song “Dreams”. Not only did his video inspire a TV commercial and introduce a whole new generation to Stevie Nicks, but his use of the decades-old song sent “Dreams” to the top of the Billboard charts more than 40 years after its debut.



Back to the Drive-In

To ensure social distancing while still giving people their movie fix, drive-in theaters offer safe options for date night and family outings. The nostalgic pastime also caters to nostalgic cinema, and drive-ins during the pandemic have been regularly screening classic films from the 80s and 90s.



Analog Game Reboot

Nostalgic games like jigsaw puzzles and Rubik’s Cube have helped people entertain themselves offscreen while stuck at home. Jigsaw puzzle sales were up 370% in March 2020 compared to the previous year, and the #CubeAtHome challenge inspired young people to take on the popular 80s puzzle, generating more than 17 million views on TikTok.

Solve any Rubik Cube with just 2 moves!

AUDIENCES SEEK OUT COMFORT IN FAMILIAR PLACES

Within our ever-evolving and borderless identities lives a persistent desire for familiarity. As accelerating technological innovations draw us further away from our simple pasts, people turn to tried and tested pals to help them deal with the realities of today. Sometimes those are old friends or beloved pets, reliable comfort foods or a favorite book. Now, for generations who have grown up with TV, content fulfills people's nostalgic needs.

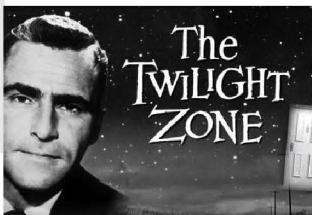
Re-watching familiar content is an increasingly popular behavior in a world shaken by the COVID-19 pandemic. Psychologists remind us that humans prefer order and predictability, and with uncertainty on the rise, repetition and known outcomes can offer much-needed comfort. Accordingly, people amass libraries of comfort content to get through trying times—**55% even have a go-to “feel good show” that they watch whenever they want to improve their moods.** And when they want to relive particular moments of their favorite shows, **26% rewatch segments so they can experience familiar emotions.** This can extend to iconic public speeches, sports highlights, and red carpet moments.

26%

of audiences have become obsessed with a show that was popular before they were alive.



*The Real World Season 1
(which debuted in 1992)



*The Twilight Zone

But familiarity is not just about personal experience. Sometimes, people want to tune into the vibes from previous eras, tapping into our televisual history to connect with members of other generations or catch up on something they might have missed. Whether they're streaming childhood favorites or historic hits like old seasons of *The Real World* or *The Twilight Zone*, viewers are escaping the paradox of choice by sticking to the comforting stories that they know and love.

Rule:

2



CONNECTING WITH **QUALITY**, CULTURE-DEFINING PROGRAMMING

Americans are watching shows to change their moods, feel their feelings, and inspire themselves to be better, all of which have stark implications for media planners. As the number of places advertisers can put their dollars grows exponentially, only certain programming has the quality to influence the emotional and cultural journeys of American audiences. Quality, culture-defining programming delivers higher engagement and offers a safe, dependable environment for brand messaging. Ad buys that ignore quality will risk missing out on the ROI that comes from being where it counts: in the heart of culture.

“

“A good buy is about so much more than video completion rates. You have to look at the full experience the audience is having.”

-- Media Planner / NYC Metro Area

“

“So much syndicated data lags behind culture — we need real viewer insights to understand how to resonate with real humans.”

-- Media Planner / NYC Metro Area



Chapter 3:

INTIMATE SCREENS

Audiences today don't just watch TV shows; they make memes and quote epic lines, comment on threads and follow stories down rabbit holes, finding community through shared references. The content we love can facilitate relationships and bridge gaps, making a stranger instantly feel like a friend. **The content we collectively consume enables us to feel a sense of belonging—and, sometimes, obsession.**

FROM FANDOMS TO STANDOMS

Being able to get that fix of your favorite content at a moment's notice means connections over content are becoming deeper and more important. Gone are the days of single episodes airing once a week. Now, TV shows spin off into content ecosystems, including fan-made fiction: Twitter threads, podcasts, reaction videos, zines, and sub-Reddits where details are endlessly debated.

This choose-your-own-adventure-style path through the rabbit holes of content facilitates connections with other stans, who self-organize to keep their icons looming large. These new standards can also deepen relationships with the content itself. There's never been an easier time to join a community of super-fans, and no shortage of spaces to perform one's zeal.



True Crime Communities

Young women have flocked to true crime TV shows and podcasts, leading to Facebook fan clubs and TikTok content. Fans have helped solve open cases and bring investigators' attention to others.



Tat My Name On You So I Know It's Real

Stans represent their passions with every fiber of their being, sometimes going so far as to have their favorite pop culture icons tattooed on their bodies. An Eminem superfan from Scotland just became the proud record-holder of most tattooed portraits of a musician, proving herself to be his biggest stan—a true tribute to Eminem, the popular term's originator.



Monumental Obsessions

Fans of Louisiana-born Britney Spears petitioned the governor to replace a Confederate statue with a monument to Britney, who they call the "True hero of the South!" Similar calls have been made by Chadwick Boseman's fans, asking that his statue be erected in his South Carolina hometown.



TikTok Cults

Platform-famous influencers are turning cults of personality into full-blown cults, complete with shared iconography, messaging systems, and loyalists willing to do their leader's bidding. The Step Chickens are one of over 50 TikTok cults that have emerged over the last year, mobilizing and empowering users to help their leaders' stars rise.



Deploying An Army of Stans

True stans have strong digital ties, and can be mobilized to take action in unlikely places. In the leadup to the 2020 election, K-pop superfans rallied together online to flood the #bluelivesmatter hashtag on Twitter with K-pop content, and signed up to inflate the presumed attendance of Donald Trump's controversial Tulsa rally—only to ditch their posts, leaving scores of empty seats.

PEOPLE BUILD RELATIONSHIPS THROUGH A SHARED LOVE OF CONTENT

If the fragmentation and polarization of media drive people apart, shared tastes in content can bring people together. Fan communities can be niche, but some are enormous, offering thousands of opportunities for connection.



"That's how I met my wife. We started to talk because of our obsession with reality TV shows, but we had different favorites and now over time she watches some of my guilty pleasures and I watch hers...we love our time watching together."

-- Male, 41 / Illinois

The total universe
of ViacomCBS fan
communities is

OVER 1B

almost as big as
the population of China!

All I want is someone
who wants to binge
watch the same
shows I do.



someecards
user card

People are passionate about the shows they watch, whether they're popular picks or guilty pleasures, and they use the shared language of fandom to connect with strangers—and even strengthen their existing relationships.



"My late wife was a big Star Trek fan like me. She loved it as much as I do. It brought us closer together before she passed away."

-- Male, 51 / Ohio

**Nearly a third
of Americans have
deepened their connection
with someone because
they realized they
were fans of the
same show.**



“

“Because of Tik Tok, Twitter, and Instagram, the cultural cache of standom is higher than ever. We reward people for their obsessions. Being a fan is no longer good enough, emotionally you have to go hard.”

-- Julia Alexander, Streaming & Entertainment Reporter, *The Verge*

30%

of people have found someone more attractive because of the TV shows they loved.



Social conversations are often dominated by responses to content, allowing shows to take on lives beyond their 30-minute slots. Strangers

connect on Twitter to comment on the latest *The Daily Show* interview or the most recent houseguest to get evicted on *Big Brother*, encouraging audiences to watch shows within a window to keep up with the latest fan debates—and avoid spoilers. In 2020, fans flocked to social media to document their reactions to the VMAs and GRAMMYS, making them the most popular award shows of the year. As shows build out their connective threads, audiences weave webs together.

“

“I went on a first date with someone because we both liked Survivor.”

-- Male, 29 / Illinois



*Big Brother Eviction



*The Daily Show

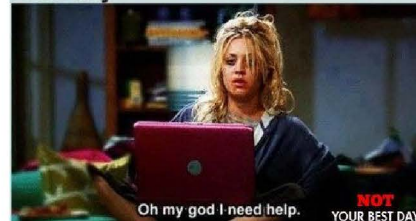
CONTENT IS THE RELIABLE PARTNER THAT PEOPLE NEED

When human relationships don't hit the right notes, people build relationships with the content they consume. TV shows become daily or weekly priorities, and audiences stay faithful to their streaming dates. **People say you don't need more than 3 good friends; on average, Americans stan 3 shows, committing deeply to the content they love.** Deep commitments mean that viewers give shows the attention they might ordinarily give to people, leading them into strange new territories: **30% found themselves "going down an internet rabbit hole," tracking down content across media**—from articles to podcasts to YouTube videos—to find out everything about their favorite show.

Why I Stopped Dating Men and Married a True Crime Podcast



When you get hooked on a tv show and watch every season in one day



10%

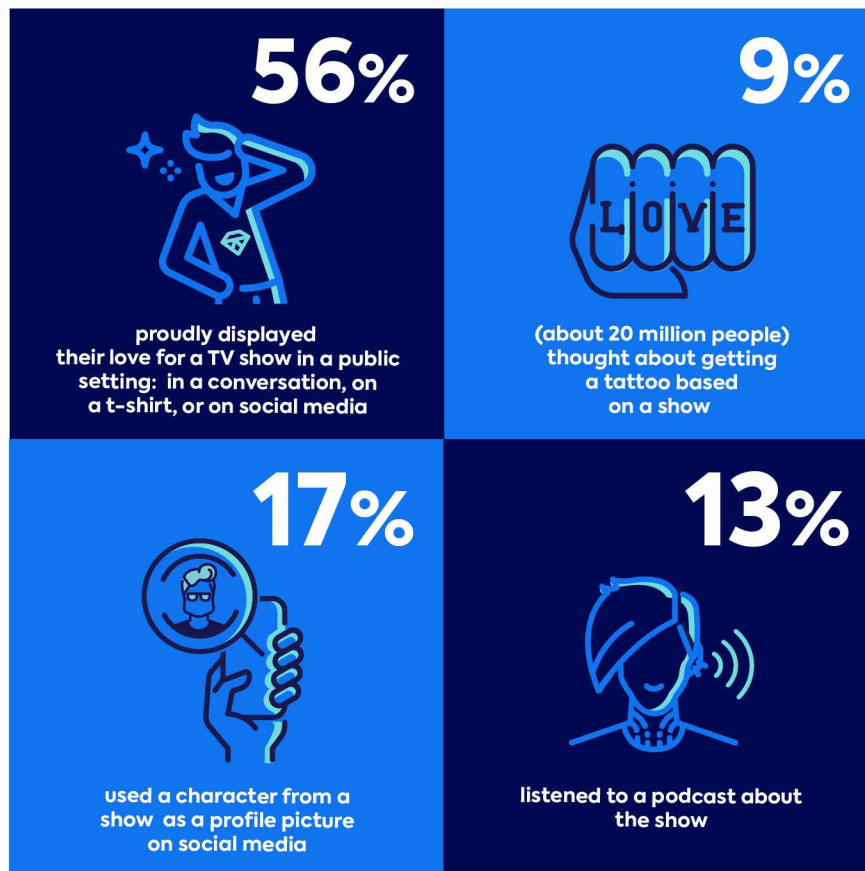
of Americans say that there was time when a show mattered more to them than their friends or family—even if it was a mostly one-sided relationship.

“

"When I'm obsessed with a series, I spend days and days watching it without leaving the room until I finish it. I only go out to bathe and eat."

-- Female, 22 / Texas

Sometimes, a connection with content can become the most important relationship in someone's life. Content also feeds people back, giving them the emotional support and much-needed cheer we detailed in chapter 2, and the reliable, always accessible bond that humans can't always provide. In this world, shows can become friends and TV characters turn into crushes—**15% of adults had a sexual fantasy about someone from a show.**



“

“This is the beauty of film and television — there are parts of us as humans we can never fully explain or fill; part of us is always searching for something. We turn to stories because they fill something in us that even a great family, great job or great friends can’t.”

-- Julia Alexander, Streaming
& Entertainment Reporter, *The Verge*

“

“I frequently find myself obsessed with RuPaul’s Drag Race. I have watched countless fan videos, stalked spoiler blogs, and purchased tons of merchandise. I have even seen the live show twice.”

-- Male, 23 / Massachusetts

Rule:

3



ALL SCREENS, AT SCALE

Audiences are connecting with each other over content in increasingly deep ways, and in a staggering number of places. With all of this fragmentation of consumption comes the challenge of scale: where can you find a large portion of your audiences across these tens of millions of touchpoints? As audiences have unprecedented levels of control over what, why, and when they watch, it has never been so important for media planners to push for scale in their buys. Prioritizing scale will help planners maximize efficiency and access passionate audiences.

A low-angle, upward-looking shot of a dark, glossy tiled floor. Several neon arrows are mounted on the tiles, pointing in various directions. One large magenta arrow points towards the top left. A yellow arrow points towards the top right. A blue arrow points towards the bottom right. A yellow arrow points towards the bottom left. The tiles are dark and reflective, showing some ambient light.

Chapter 4:

VIACOMCBS
EyeQ

& The New Rules
of Media Planning

THE NEW RULES OF MEDIA PLANNING

The streaming revolution has undoubtedly shaped the ways audiences connect with content. ViacomCBS EyeQ, the integrated product suite of streaming and creative ad solutions for brands, allows planners to be where the audience is, however eclectic, unexpected, and varied their navigation of content might be.

#1: **Refocus Targeting for Borderless Identities:**

EyeQ has the targeting to understand those personal moments of meaning-making where content speaks directly to our innermost selves. It helps media planners connect with the increasingly borderless identities of today's audiences and combine broad demo and advanced targeting to meet the needs of brands and consumers alike.

#2: **Connect with Quality, Culture-Defining Programming:**

EyeQ harnesses the power of ViacomCBS' quality programming to turn fandoms into standoms. It allows media planners to leverage the culture-defining programming airing across ViacomCBS channels to influence the consumer journeys of audiences across America.

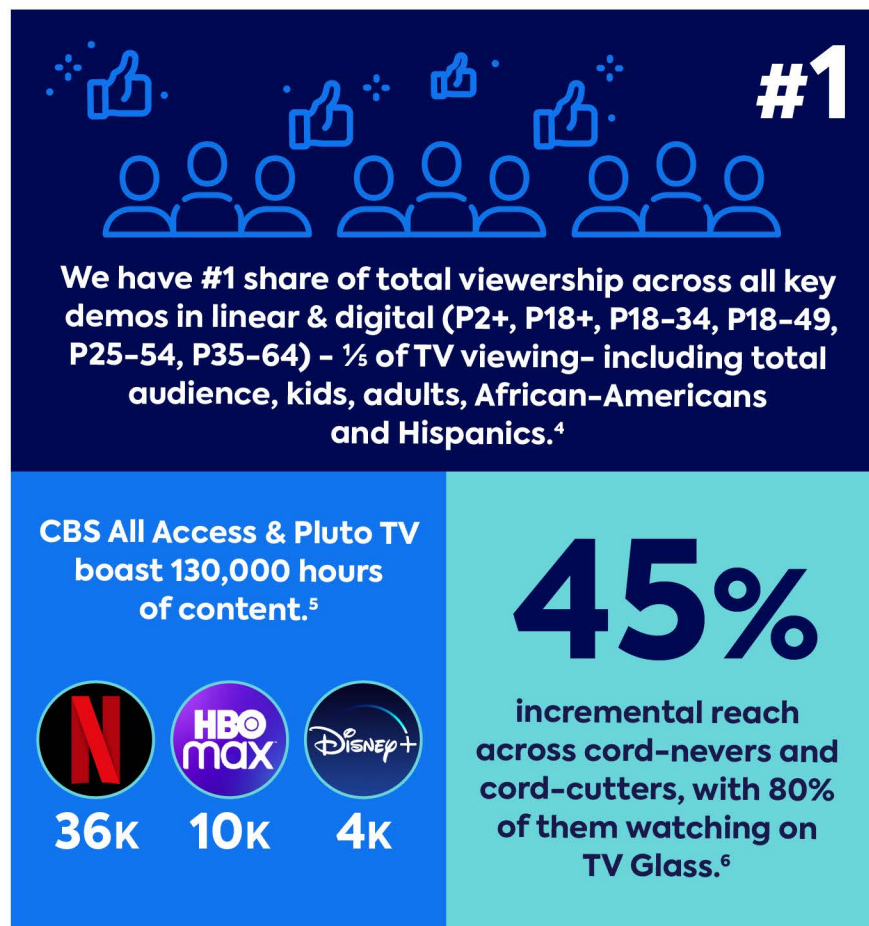
#3: **All Screens, At Scale:**

EyeQ has the scale to encompass all the places we turn to for self-expression. It gives media planners access to the increasing number of touchpoints where viewers connect with the content they love, allowing them to maximize efficiency as they search for passionate audiences.

SCALE

Harness the Ability to Reach Incremental Audiences at Scale

Given that audiences now have unprecedented levels of control over what, why, and when they watch, it has never been so important for media planners to push for scale in their buys. **With over 50M+ full episode viewers monthly**, EyeQ provides unrivaled scale and direct access to these built-in audiences whenever and wherever they watch. With a scale that large, EyeQ rivals the reach of other leading platforms, including Hulu, Roku, and Amazon.³



³Freewheel, Google Ad Manager and ComScore total unique devices, de-duplicating those across each supply tranche (legacy CBSi, including All Access, Pluto, Viacom Video), accounting factors for co-viewing and viewing on multiple devices.

⁴Nielsen Media Research (cable & broadcast) & Nielsen Npower (syndication), L7 data for the selected demos, CY2019, all English-language networks & syndicators including pay cable and commercial-free children's TV (DSNY & DSJR), weighted by program duration.

⁵Internal ViacomCBS Global content data, Medium: The Story of Netflix, CNBC HBO Max total content in hours, TV Technology: Disney+ total content by hours cable and commercial-free children's TV (DSNY & DSJR), weighted by program duration.

⁶The Harris Poll Company audience survey across legacy Viacom, CBS, All Access, CBSN, CBS Sports HQ, and ET Live, 2019.

QUALITY

Deliver Your Message in a Brand Safe Environment with High Impact

Only some shows and networks are able to impact and influence culture and fuel the private fantasies and identities of Americans. Audiences across the country increasingly expect brands to join cultural conversations, understanding and wielding their influence when appropriate. Ad buys that ignore quality and relevance risk missing out on key branding and ROI opportunities. EyeQ offers modern marketers and brands an opportunity to seamlessly join the cultural conversation and meet evolving consumer expectations.

From The Super Bowl to the MTV VMAs to the GRAMMYS, ViacomCBS is home to more tentpole events than anyone else in the industry, allowing brands to buy across 40+ major cultural moments. Advertisers can use these opportunities to engage audiences in fun and meaningful conversations.

In addition, ViacomCBS' broad portfolio across social media speaks to consumers from all angles. Unique programming on social media reaches fans across our portfolio, from *The Late Show with Stephen Colbert* to GenZ-focused AwesomenessTV to the latest viral moments across CBS Sports and beyond. Our massive footprint and highly engaged audiences help your brand engage audiences on social platforms, communicating directly with fans and inspiring user generated content.



⁷ViacomCBS Global Social Media Presence across Twitter, Facebook, Instagram, YouTube, Tumblr, Snapchat and TikTok as of December 2020.

⁸Tubular Labs - total monthly unique viewers across ViacomCBS properties on Facebook and YouTube, November 2020.

⁹Nielsen TV Reach (all CBS and Viacom networks combined), comscore unduplicated reach (CBS interactive, Viacom Digital, Pluto.tv), May 2020.

TARGETING

Leverage the Power of Targeting and Data to Reach Audiences Everywhere

For media planners, it is simply not enough to rely on broad targeting data, because what people watch can't be predicted by demographics alone.

EyeQ unlocks access to every portal of ViacomCBS content consumption and brings the incrementality in ad buying that media planners crave, finding the true (and sometimes surprising) audiences for their products. With EyeQ, you can serve ViacomCBS viewers with relevant ads that directly address their real-time needs.

EyeQ makes it easy for planners to maximize buys across platforms and demos with strategic targeting, frequency management, and different ways to buy:

- Content segments: verticalize spend under news, sports, entertainment etc.
- Broad or specific demos: maximize reach across all viewership and platforms
- Advanced targeting: leverage first or third-party data, behavioral/intent sets, or custom audiences
- Ability to opt-in and opt-out

VIACOMCBS

Vantage has the largest addressable footprint in the TV industry with over

41M

addressable TV households.¹⁰

ViacomCBS' Advanced Targeting product *Vantage* enables marketers to go beyond traditional demos to deliver audience-driven campaigns across linear, addressable and connected TV channels. Marketers can connect segments to the *Vantage* platform, which will match your segment to viewing data. EyeQ's *Vantage* uses predictive modeling and analytics to understand how your custom audience aligns with linear, addressable, and connected TV viewership. *Vantage* helps you design a campaign that reaches audiences in the places that have the greatest impact.

¹⁰Travis Scoles, SVP Product Management - BeetTV, 2020.

IN CONCLUSION

The streaming landscape of tomorrow puts audiences in the driver's seat, letting them develop individualized content pathways in service of their emotional needs and exploratory impulses. Whether they're seeking out nostalgic shows to calm their minds, escaping into fantasy portals or live experiences that connect them with other superfans, audiences know that on-demand streaming media is a trusted partner, helping spark their imagination so they can build and embellish their worlds. For brands and media planners who want to connect with audiences in these formative moments, ViacomCBS EyeQ provides the targeting to meet audiences where they live and dream; the quality content that excites and inspires Americans of all demographics, identities, and interests; and the scale to reach all the touchpoints in a viewer's content journey.

For more information, or to view the presentation, please contact your ViacomCBS digital sales representative.

METHODOLOGY

ViacomCBS Velocity's Creative Strategy & Cultural Intelligence team conducted the following combination of quantitative & qualitative research approaches:

Culture Tracking

Insights unearthed through semiotics, cultural and social analysis, AI and machine learning, and consumer research to harness a deep cultural understanding of macro drivers and shifts in behavior.

Nationwide Quantitative Study

The quantitative sample was collected over a one-week period in December 2020, totaling 1,503 completed responses, using a 95% confidence level and a 2.53% margin of error based on a total US population of 328,000,000.

An original sample was collected which was then balanced to demographic characteristics of the US population including but not limited to geography, age, gender, ethnicity, income, education level, job type, and political affiliation. Balancing is combinatorial in nature, such that demographic characteristics are mapped to known American Community Survey (also known as the Census) data rather than individually weighted in a vacuum.

The approach also utilizes a technique called "known sampling" in which the identity of respondents is verified for accuracy.

Consumer Interviews

Eight 1:1 conversations conducted in late 2020 with US media consumers across ages, genders, and ethnicities. Respondents were compensated for their time.

Expert Interviews

Six 1:1 phone interviews were conducted in late 2020 with US media influencers, luminaries, and media planners. Experts were compensated for their time.

