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Why we watch

Co-creating culture: how
viewers inform and influence
the content they love



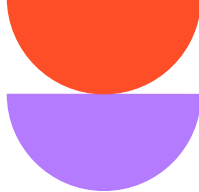


**Audio-visual culture is still in its infancy,
but is the cultural product of our time**



Objective

Why, out of all the forms of leisure activities available, like reading books, meeting friends, walks in the park, [...] people decide to **spend their time watching videos?**



NEW! Custom Research

27K

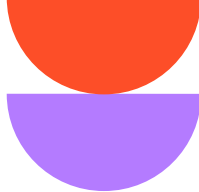
viewer surveys in nine countries across Europe and the Middle East completed, incl **video diaries** with 27K+ viewing occasions analysed.

15X

in-depth interviews with experts from a range of fields – including media industry experts, content creators, and academics

3

week-long longitudinal **qualitative research** program revealing decision-making within the video ecosystem, across >100 consumers



Research already available

16K

viewer surveys across EMEA markets, spanning across a series of topics: cTV, Short

180x

in-depth interviews with consumers across cTV, Shorts topics

Video has become the default format to address our everyday emotional and intellectual needs

“ Video plays a huge part in my life and I would definitely struggle without it. It’s part of my routine, the structure of my day, it provides a way of switching off, providing familiarity and comfort, or taking me on a thrilling rollercoaster. ”

FEMALE, 40-49



Source: Google/TBA, Why We Watch, 24 x Qualitative immersion in each market (UK, DE), 18-65yo, representative mix of male/ female, ethnicities, living situation, ABC1C2, employment status, locations. Mix of devices, days and amount of time spent watching video across platforms per week



Four key needs have remained constant

EMOTIONAL NEED

STIMULATE & ENTERTAIN

Video is an **engaging, enjoyable and low-effort** way to spend a bit of time – that can enhance how we feel in a moment

DO & LEARN

Information is easy to process through video, so we rely on it to provide knowledge, **helping us feel competent, capable and in-the-know**

CONNECT TO OTHERS

As social beings, video is a **powerful tool for connection**, both to those around us and on the screen

SELF IDENTITY & GROWTH


Video facilitates **exploration of the core of who we are** – it helps make sense of our history and our experiences



The **reasons we watch** have stayed the same.

But **why** does the video landscape feel **undeniably different?**

It's due to one key factor — **viewer agency.**



The **viewer agency** is not a new concept, but it takes a new meaning in the modern video landscape, where:

The audience is no longer a **passive recipient**.

They are an **Engaged Curator**, building their **own personal media universes**.

They are the **Co-Creators** of culture.

Viewers As Engaged Curators



01

ANCHORS

02

TECHNOLOGY

03

DEEP
RELATIONSHIP

How we navigate the media universe

CONSCIOUSLY

Considered browsing

“ I use Netflix and Prime for films – when we want to make more of the evening. ”

FEMALE, 50-65

UNCONSCIOUSLY

Instinctive habits

“ I didn't intend to watch this specific video it just came up on my Instagram home page. ”

FEMALE, 18-29

Routine habits

“ I usually watch YouTube, Netflix or Prime on my iPad in the evenings/ before bed. This is part of my usual routine. ”

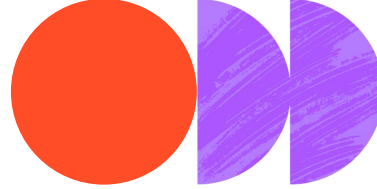
FEMALE, 30-39

ANCHORS

When we navigate consciously, we use “anchors”

This is a concept from behavioural science. With more time available we may allow ourselves to be guided by **the associations we make between content platforms and the specific emotional needs they answer.**

If the reward we experience is strong enough, these associations can become “anchors”.



61%

of video viewers say they choose short-form videos to discover a new product or brand, while 57% choose long-form videos to go deep into a particular topic / type of content²

TECH

But ‘anchors’ are not the only thing that’s affecting viewer behaviour, **technology** is also playing its part in how viewers discover content they love

Algorithms have a fundamental role in helping viewers design their own personal media universes



TECH

YouTube technology helps raise the level of personal relevance for viewers

“ My YouTube homepage is incredibly personalised to me. The algorithm has known me for 15 years. I would never make a new account because it's so easy to find something that interests me on mine! ”

FEMALE, 25-34



Algorithms and platforms that bring familiar and novel content are highly valued across age groups

FAMILIAR

“Friends is something I could watch over and over again [...] there’s something very comforting about it.”

40-49, FEMALE



48%

of 45-60 year old viewers said that YouTube enables them to find new interests that could become important to them.¹¹

NOVEL

“I’m watching a documentary about Lionel Messi. I’m glad I’ve watched it. It gave me a new perspective. It was well put together and high quality.”

50-65, MALE



Viewers As Co-creators of culture

01

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DEEP
RELATIONSHIP

DEEP RELATIONSHIP

Viewer agency puts their preferences back out into the world, and open/UGC platforms have enabled it

“ My subscribers are vocal and tell me what they want, I have to be conscious of what I post. ”

YOUTUBE CREATOR ²

18-34

Professional creators are now the most watched category of content producers among 18-34 year olds, scoring higher than traditional production companies¹

Source: [1] Google/MTM, Mirrors and Windows, AE, DE, EG, ES, FR, GB, IT, NL, SA, 2023, n=10,497 viewing occasions among 18-34s who use at least one online video service a month (across YouTube, social media, Broadcast TV and streaming)

Source: [2] Google/TBA, Why We Watch, Creators interviews n=4 in UK/DE, +75K subscribers, producing content for at least 4-5 years, no vertical specific, creating content across different platforms. Quote from UK creator

DEEP RELATIONSHIP



1/4

of surveyed viewers said that they **feel** as though the **creators** in the content they watch **are friends to them**

Source: Google/MTM, Mirrors and Windows, AE, DE, EG, ES, FR, GB, IT, NL, SA, 2023, n=10,484 people who claim to use YouTube at least once a month

DEEP RELATIONSHIP

There is a strong reciprocal relationship between creators and audiences

“ Most of the time ads on YouTube don't really bother me at all. With some creators [...] I'll watch the ads because I want them to get the revenue and because I really appreciate the effort and time they put into their content. ”

MALE 25-34²



58%

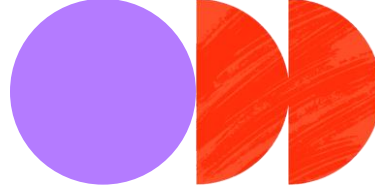
Of surveyed YouTube users said that they want to support the creators they relate to by watching ads alongside their content¹

IKEA EFFECT

The more empowered viewers feel, the more their desire to watch increases

Once viewers have invested time and effort curating and optimising their viewing experience, **they value it more and feel more invested in it.**

A possible explanation of this phenomenon can be found in **behavioral science.**



IKEA EFFECT



We disproportionately value things we've spent time and effort investing in¹

Sources: Google/TBA, UK, DE, Why We Watch, 24 x qualitative immersion in each market, 18-65yo, representative mix of male/female, ethnicities, living situation, ABC1C2, employment status, locations, 2023. Mix of devices, days, and amount of time spent watching video across platforms per week.

(1) The "IKEA Effect": When Labor Leads to Love, Michael I. Norton, Daniel Mochon, Dan Ariely, Harvard Business School, 2011.



Let's put everything together:

Audiences now use their agency **not just to choose, but to influence content.**

They become a **critical decision maker** alongside media owners and content producers.

The content we watch isn't just entertaining, edifying or resonant: **it's ours.**

Stay tuned, more is coming on the
IKEA Effect...

1) **Measuring** the IKEA effect

1) Running **Experiments** to gauge its
impact on Platform, Content, Ads

