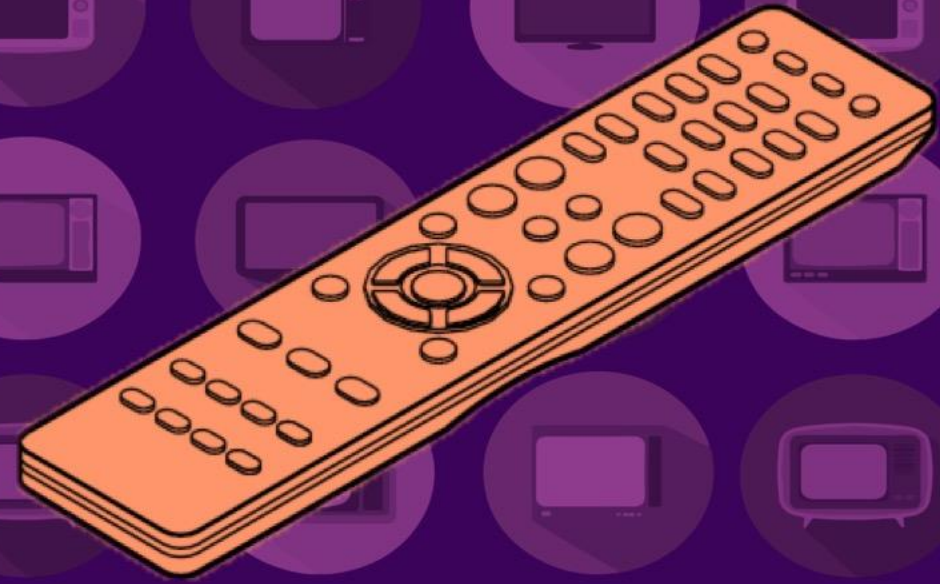


# Is Context the new “king”?

A NEW MODEL FOR WINNING THE CONTENT WARS

## **PRESENTER**

**Andrea Marker** SVP, Head of Content Strategy at Ipsos



# AGENDA

1

**Your Host**

**Andrea Marker** | SVP, Head of Content + Platform Strategy



2

**About Ipsos**

**Introducing Media Development**

3

**Is Context the New King?**

**Diving into the 2020 Content Wars**





Introducing...

# Ipsos Media Development

The expertise and service of a boutique, backed by the analytical power and global reach of the 3<sup>rd</sup> largest provider of insights in the world.

*Quant and Qual solutions across...*

Content  
Strategy



Tech and  
Media Platforms



Syndicated  
Audience Insights





# Introducing Streaming 360

markets

**US + UK**

Initial wave fielded in Q4  
2019

interviewed

**8,000**

Adults 18+ online

analytics

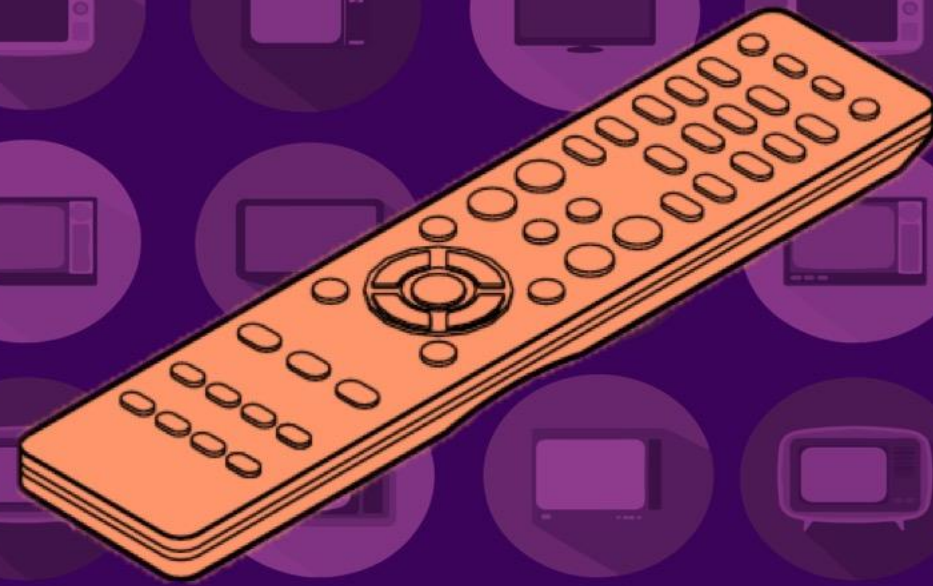
**DCM**

Data covering the  
landscape, audience,  
positioning, plus a  
discrete choice model



# Is Context the new “king”?

A NEW MODEL FOR WINNING THE CONTENT WARS



How do you **choose** how to spend  
your time when there are...

532

**scripted series**  
to binge

871

**movies**  
to support your popcorn habit

9,050

**video games**  
to wear out your wrists

750,000

**podcasts**  
to obsess over

262,000,000

hours of **YouTube** to scroll through

...released in just **one year?**





To understand how people make content decisions, we partnered with the **UT Austin Innovation Lab** and...

interviewed

**99**

13-54 year-olds in-person,  
in focus groups and  
in their homes

analyzed

**1,500**

Video diaries of  
viewing occasions

surveyed

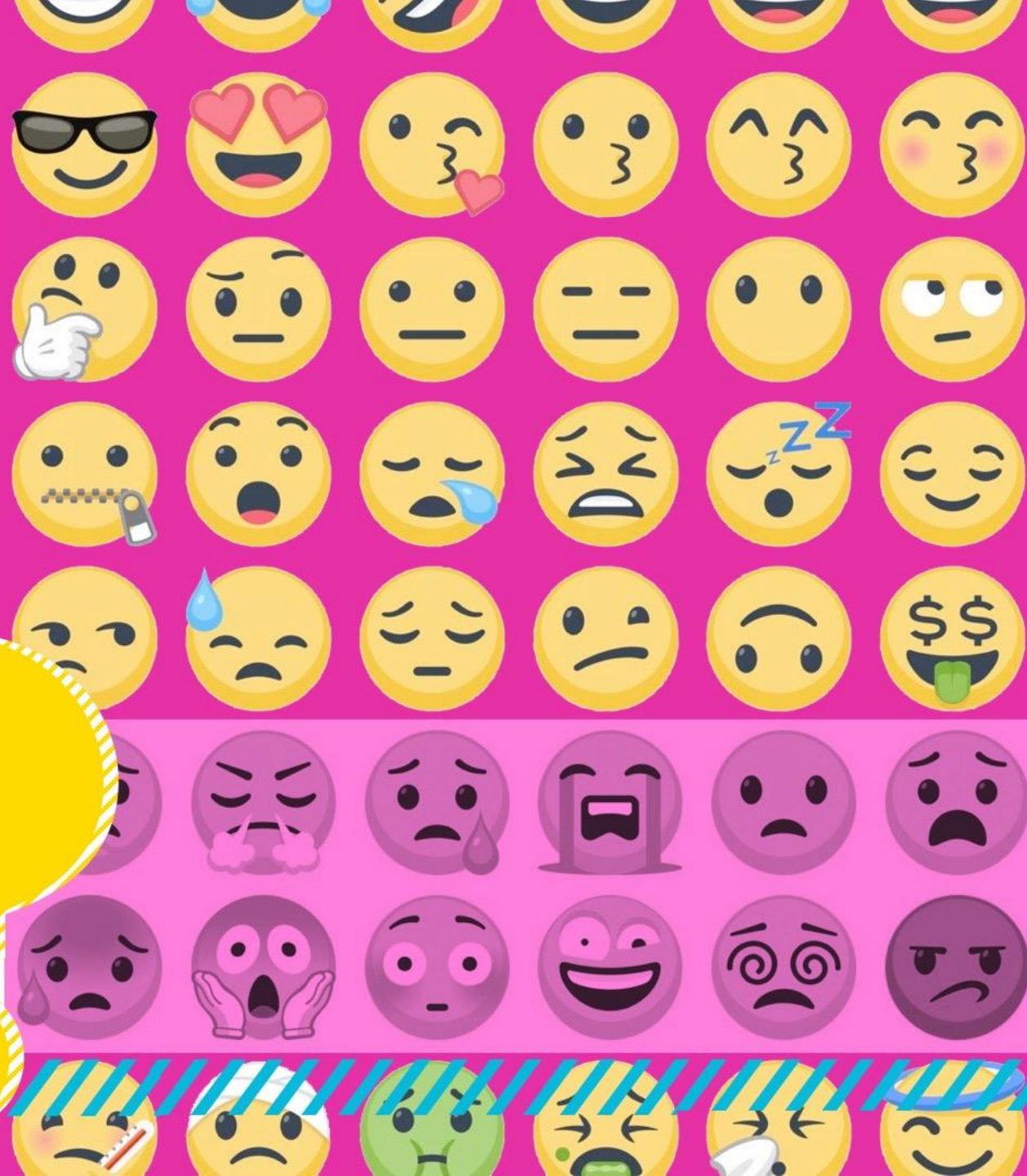
**17,000**

US consumers 13-54 via  
the Ipsos Knowledge  
Panel



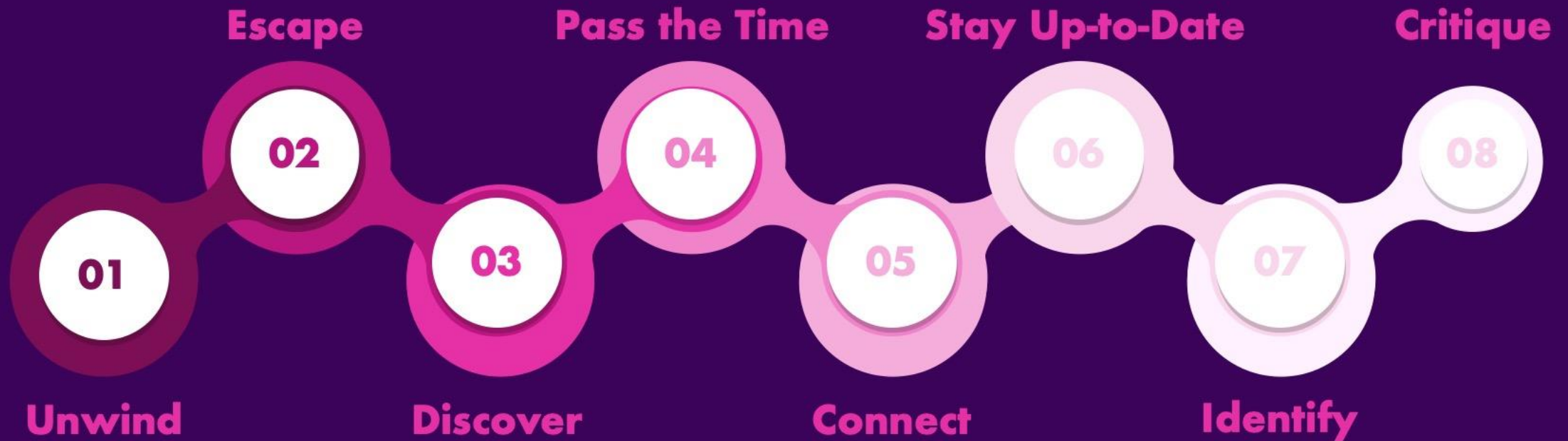
**We kicked off our  
research with a  
simple question:**

**What mood  
were you in**





**We uncovered 8 need states that describe how people make content decisions.**







But everyone satisfies their  
need states **differently.**

Just look at **escape...**



It's not just about the content...

If everyone's way  
of satisfying their  
needs is different,  
then how do  
we understand  
content choices?

It's about  
context.

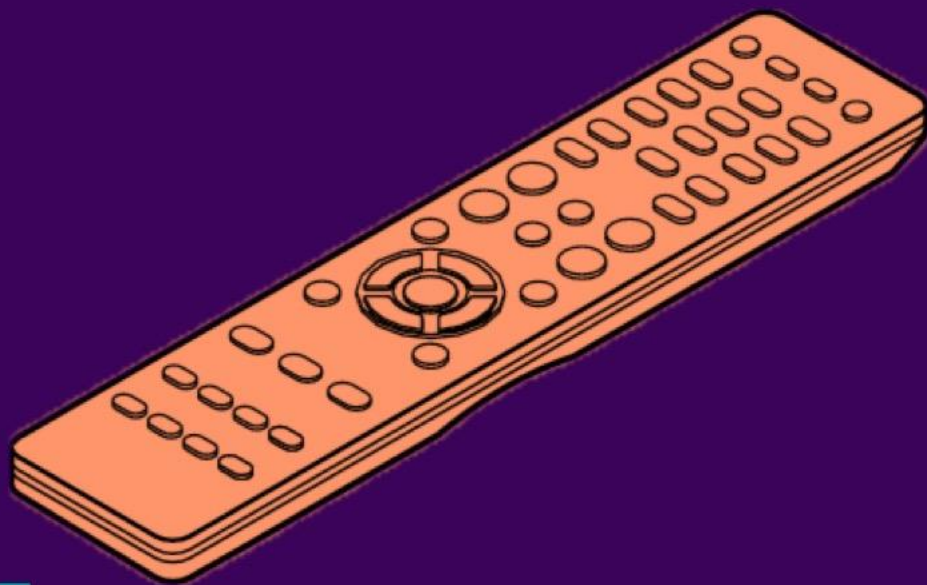
**We uncovered 4 context factors that determine how people select content:**

**A**ccess...how you watch.  
Audience...how you're socializing.  
Gender...how it fits into your day.  
Attractors...how it got on your radar.



# Content Context

A Framework for Understanding  
Consumer Content Decision-Making.



UNWIND

ESCAPE

DISCOVER

PASS THE TIME

CONNECT

STAY UP-TO-DATE

IDENTIFY

CRITIQUE

**Access** is the  
biggest contributor  
to content choice.

**ACCESS**

AUDIENCE

AGENDA

ATTRACTORS

# Let's talk about **access.**

In 2019, there were...



# 192

**channels  
on TV**

---

Only **13** were used in an average household.

# 271

**streaming  
services**

---

Only **3** were used in an average household.





In 2019, consumers spent  
**\$121** a month on **cable**  
and **\$33** a month on  
**streaming...**

**...and they're getting  
close to being **tapped out.****

While 1 in 3 consumers are open to new streaming services, **only half as many** are willing to pay for them.

**36%**


open to adding  
a service

**18%**

willing to increase  
their spend

**72%** of consumers want to keep their streaming budget **as is**, so if they add a service, they'll need to cut—or share—one.



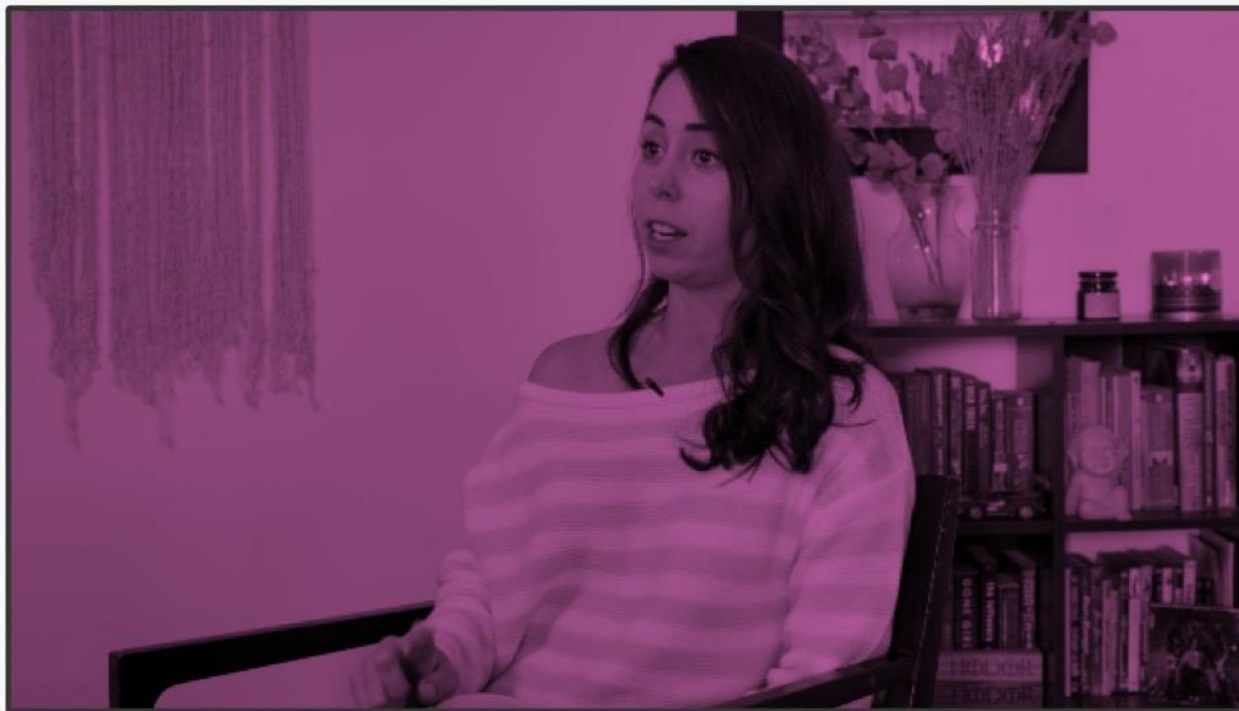


# So how do you entice someone to try a new streaming service?

It's about having their favorite shows exclusively, right?



Well...not quite. Ultimately,  
access trumps content.





A cartoon illustration of Homer Simpson sitting on a brown couch. He is wearing a black tank top with a yellow Superman logo. He has a surprised or concerned expression on his face. In the background, there is a framed picture of a sailboat on the wall and a rotary phone on a small table to the left.

**People are more loyal  
to platforms than  
shows.**

**It's a lot easier to passively find a  
new show to satisfy a need state  
than actively search for something  
new across multiple services.**

# Platform loyalty also trumps creator loyalty. Just ask **Microsoft**.

When Tyler “Ninja” Blevins ditched Twitch for Microsoft’s Mixer, his fans—and their views—didn’t follow.

twitch

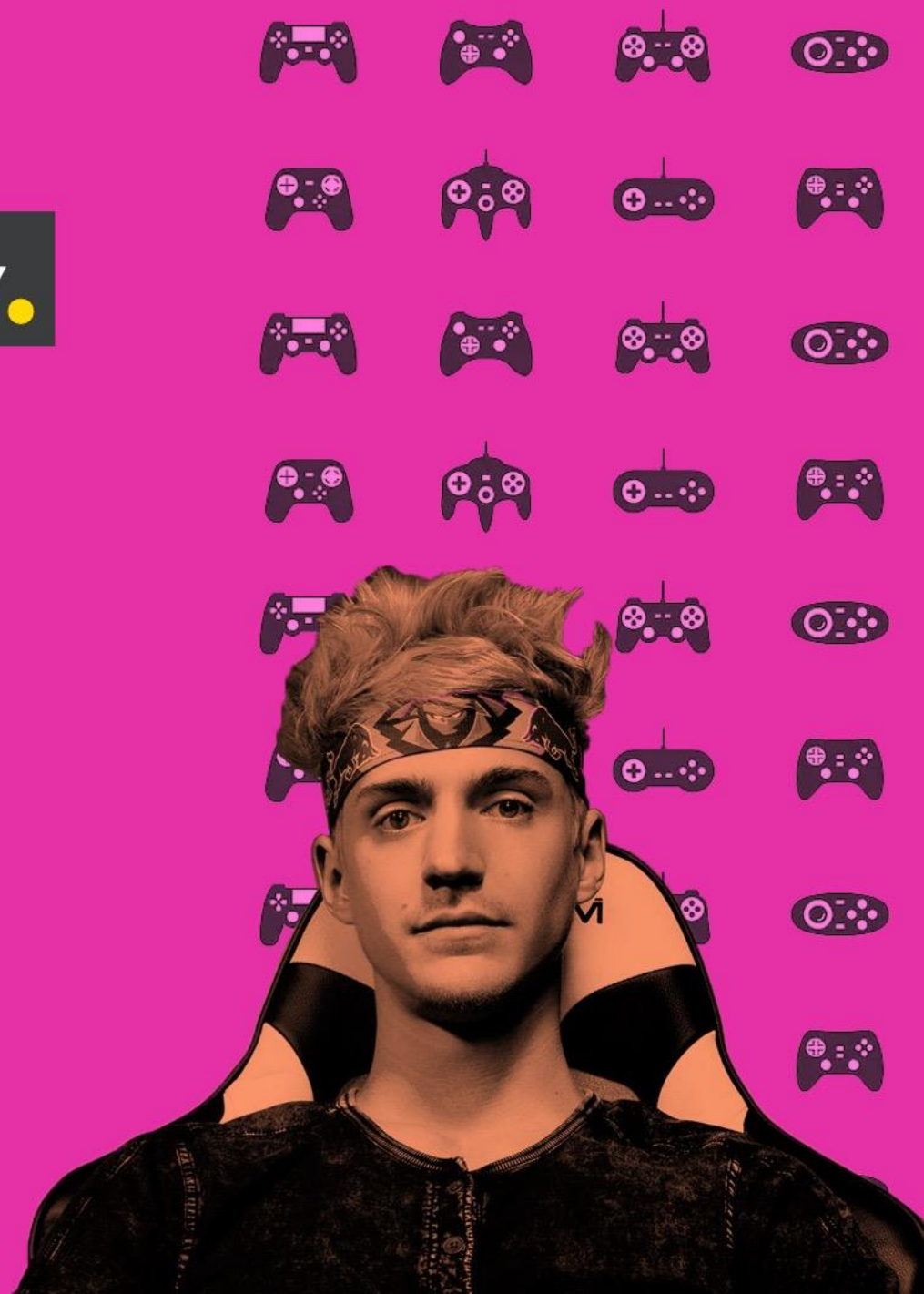
14.7

million followers  
August 2019

mixer

2.7

million followers  
January 2020





**Variety** is another form of **access** and a key driver of loyalty.



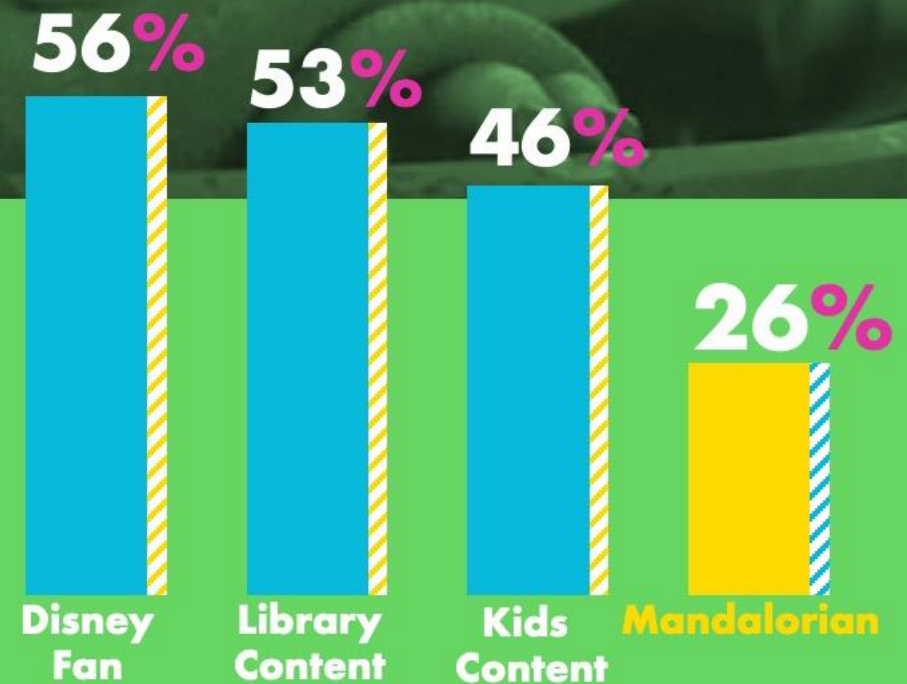
**Streaming is almost like a buffet. I like the choice. So if I feel like Chinese or Italian or Mexican, Netflix has that. Comedy, action, adventure, sci-fi, cooking shows for the missus. They have everything.**

**That's important, 'cause I never know what kind of mood I'm in to watch something, but I don't want to be in a mood to watch something and have that "cuisine" not available.**

**–Male, 38**



Even at peak Baby Yoda, direct Disney+ sign-ups were **more about variety** than **one particular show**.



WHY DID YOU SIGN-UP? (11/19)





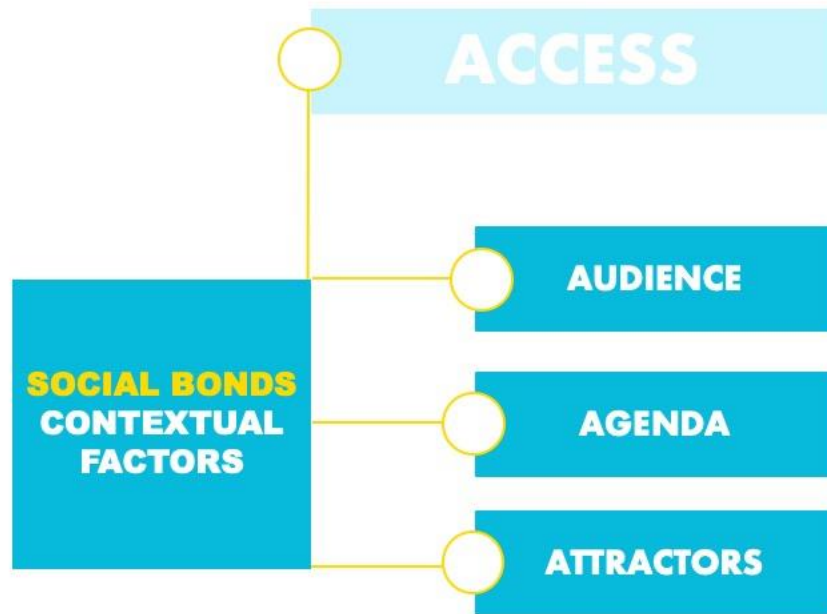
But **access** isn't enough.  
What drives content and  
platform usage?

Ultimately, it's about having a **social bond** with  
what you're watching or experiencing...



# ...It's just what we think of as **social** has evolved.

Technology has disrupted the boundary between media and non-media interactions, changing the relationships viewers have with what they view.



It used to be about your world IRL – now your world has gotten a lot bigger.





# We used to have **parasocial** relationships with content.

pa•ra-so•cial | adjective

One-sided relationships, where one person extends emotional energy, interest and time, and the other party, the persona, is completely unaware of the other's existence.

For example, back in pre-Facebook

# 2004

you probably had an opinion on...



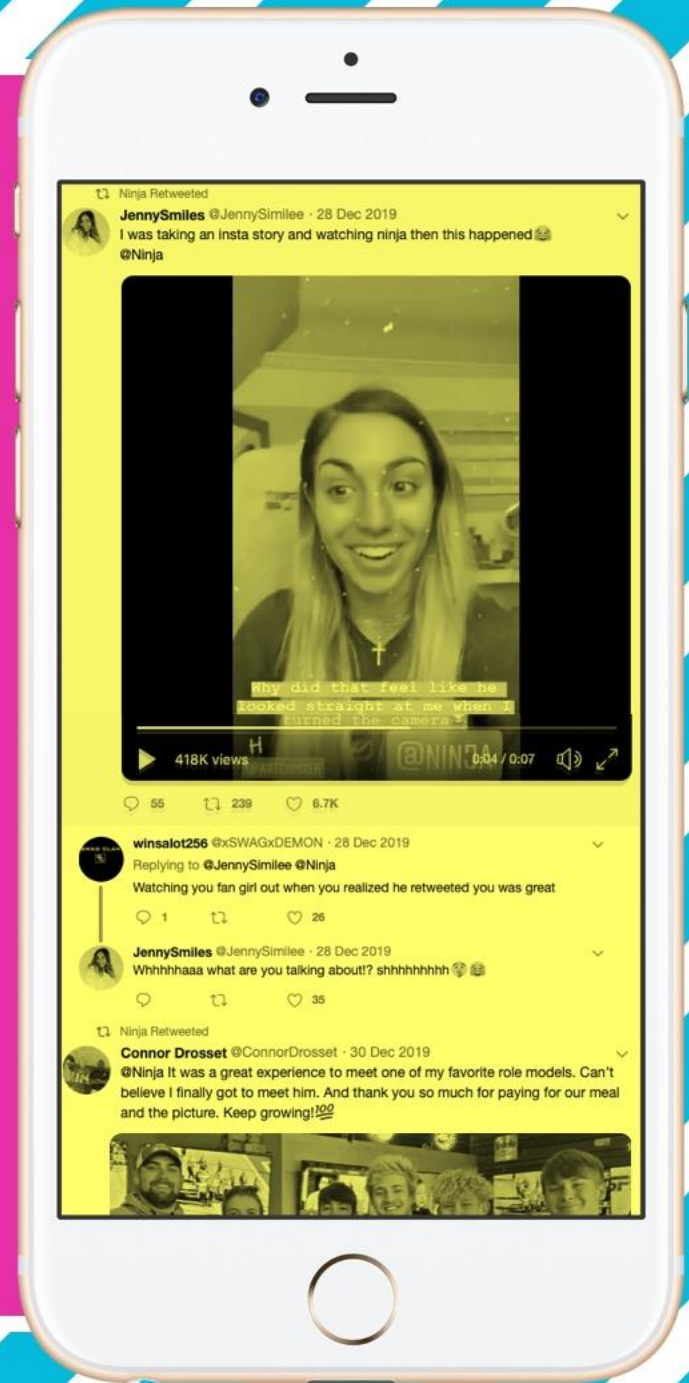


# In 2020, why settle for a parasocial relationship when you can have a social one?

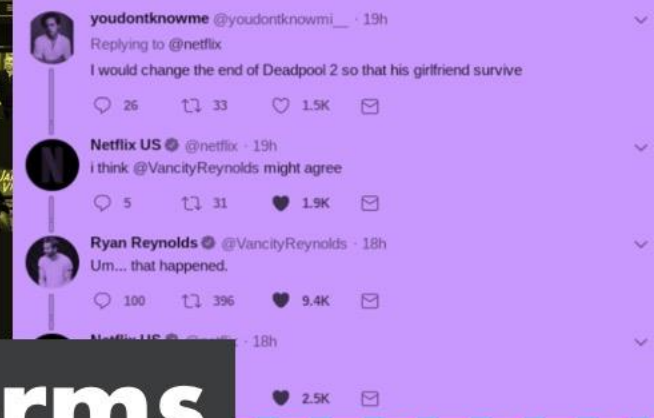
Instead of talking about a character, you can now talk to one. And if you're lucky, they'll talk back.



Fans didn't miss Ninja because he wasn't really gone. He's still in their lives – just not on Twitch.







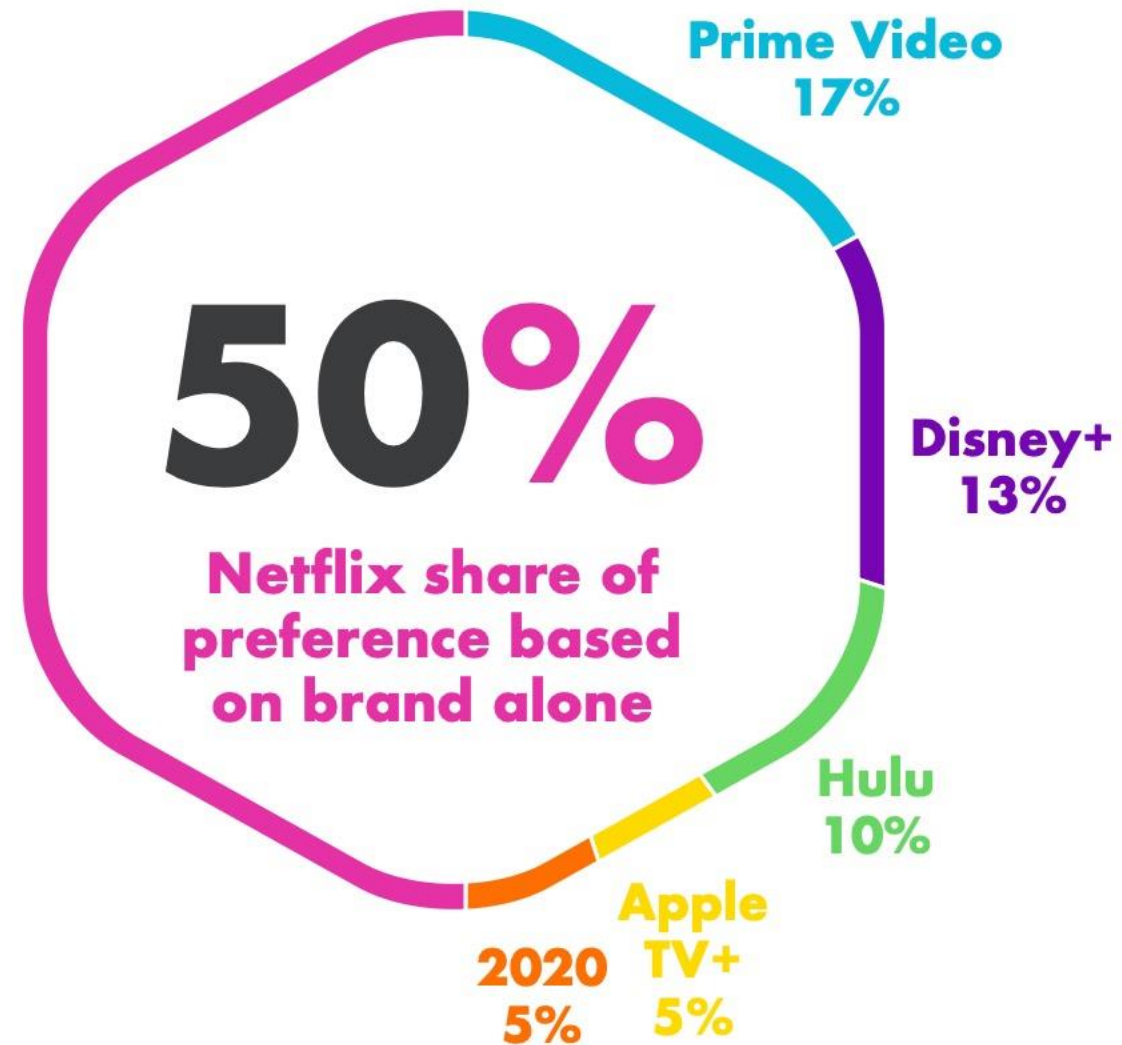
These social bonds extend to how people talk about platforms as well, serving as a key attractor.





Netflix's strength is also apparent when analyzing brands in a discrete choice exercise.

The 2020 content wars aren't about dethroning Netflix – they're about the battle for second and third place.





# What are the **attractors** other services can leverage to grow their share?

## Non-Subscribers

**#1** Value  
driver

Index **157**

## 1-2 Paid Subscriptions

**#1** Diversity  
driver of Content

Index **220**

## 3+ Subscriptions

**#1** Buzzy  
driver Content

Index **162**

# Content Context

So if **context is the new king**, how do you win in the 2020 content wars?

Use this framework to think about how you...

**1** Satisfy a **variety** of  
● need states with your library.

**2** Make it **easy** on the consumer  
● to **access**.

**3** Strengthen your **social bonds**  
● with your audience.

UNWIND

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IDENTIFY

CRITIQUE

ACCESS

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AGENDA

ATTRACTORS



**Thank You!**





# Ipsos Audience Intelligence



## AFFLUENT INTELLIGENCE

The longest running study of affluents in the world.



## TV DAILIES

The industry standard for TV title tracking, 15 years running.



## KIDS & FAMILY

An in-depth snapshot of the American family and the intersection of media and tech.



## STREAMING 360

Empowers clients to refine platform positioning, enhance marketing strategy, and improve audience targeting and acquisition.