LOCKDOWN TV VIEWING: FROM ‘ME’ TO ‘WE’

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GAME CHANGERS

Ipsos

Aside from its immediate health dangers and economic reverberations, the Coronavirus has, for the time being, upended everyday life as we know it. “Social distancing,” working from home, foregoing outside activities and events, and staying in is the “current normal.” These new behaviors are impacting everything from online shopping, food and restaurants to TV usage.

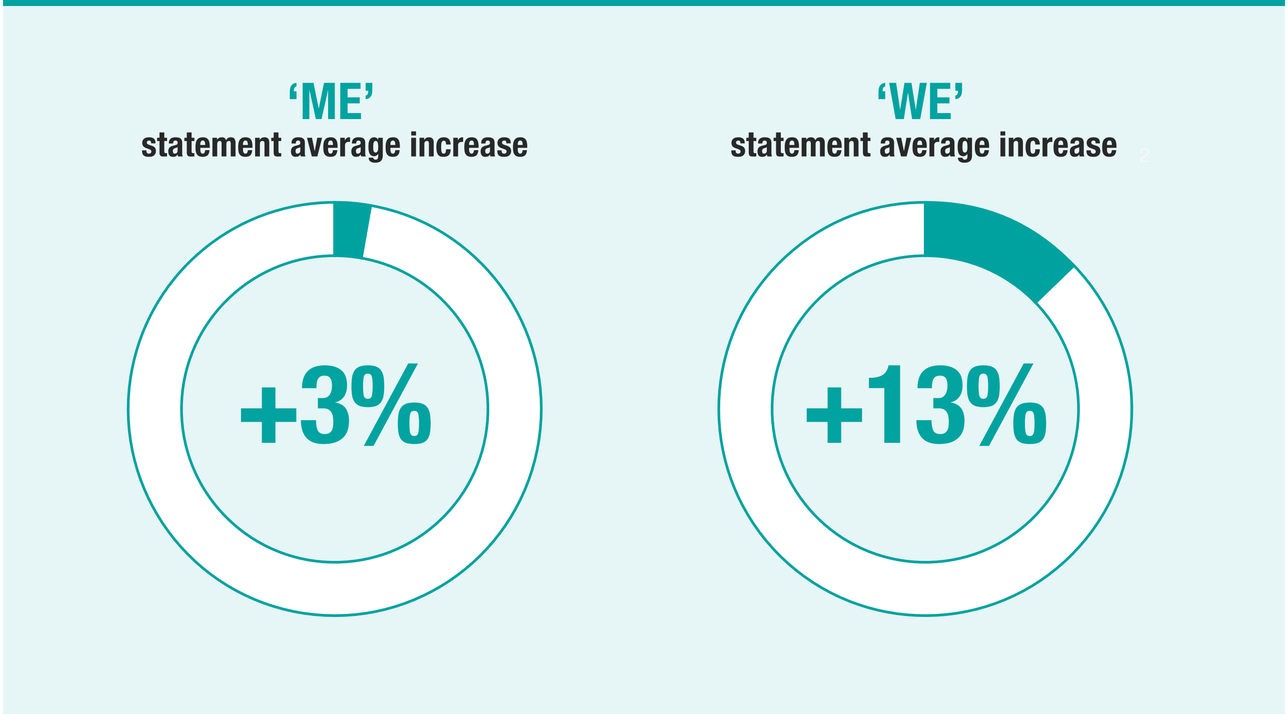
How should media companies be tailoring their programing to these emerging viewership patterns?

We have seen a lot of data around this upswing in TV viewing during this period. TV viewing is up across dayparts from news to entertainment of all types. Streaming is up, with Netflix viewership hitting all-time highs. Everything from Premium Cable to Local TV is well up year-over-year. **But as nationwide quarantines took hold in March, an interesting and clear shift occurred: The driver for consumers’ video choices changed from “Me” to “We,” according to Ipsos Streaming 360 research.** Media companies can tailor their programming to these newly emerging viewership behaviors to meet viewers where they are.

Ipsos has tracked consumer awareness, intent to subscribe and other attribute ratings of leading streaming providers since November 2019, as a complement to its newly launched Streaming 360 research. To inform subscriber acquisition and retention, driver analyses examined the impact attribute ratings have on driving likelihood of subscribing and continuing to subscribe.

Ipsos compared the key drivers for Netflix, Amazon Prime Video, Disney+, and Apple TV+ in the US and UK in late 2019 vs. data collected March 5-11 this year. When looking at these 4 streaming services across the US and UK for the March wave vs. prior wave, the impact of 'We' metrics on Likelihood to Subscribe/Continue Subscribing went up 13% on average vs. just 3% for "Me" attributes.

Drivers for likelihood to subscribe/continue to subscribe



One key 'We' attribute, *"Is popular with most members of my household"*, is the dominant driver across providers/markets. In six of eight cases, this 'We' attribute ranked #1 in March vs in just two of eight cases in November. Further, in most instances, this key driver shifted from a 'Me' attribute in the prior wave. In the US, the impact of popularity in one's household was up 23% for Apple TV+ and up 21% for Disney+ vs. Wave 3. In the UK, there was a 21% increase in the impact of the attribute for Apple TV+ and 11% for Disney+ vs. Wave 3.

This evolution makes intuitive sense. As consumers are watching TV and video together more, not surprisingly their selection criteria have become more focused on what they enjoy together. In essence, this more communal TV viewing experience hearkens back to earlier phases of TV history, when communal watching was the norm. Evolutions in technology, entertainment and overall culture have resulted in pushing family members apart – either physically (in different locations, doing different things) or digitally (different types of viewing, different devices, different social/communication tools). **With people sheltering in place, there's been a return to the importance of the communal viewing experience.**

How can Media companies and platforms leverage this insight and resonate with consumers in the immediate term?

Consider some of the following ideas:

01.

Content providers could be promoting and leveraging content that is appropriate and suitable for the entire family and complements co-viewing. That doesn't mean it has to be G-rated – no doubt many families are binge watching "Tiger King" just as much as "Lion King."

02.

This craving for shared, communal viewing experiences is being felt by families, as well as folks who live alone – it's human to seek company and connection, especially during times of anxiety. This has given rise to "party viewing" and other hacks to co-view shows remotely. Media companies should seek ways to leverage and extend these remote, co-viewing opportunities.

03.

One side effect of the rise of co-viewing is a commensurate rise in binging of classic, older TV shows, movies and sports events. It's likely not just nostalgia, but that parents desire to share their old favorites with their children. Content providers should consider leveraging this sharing behavior to get the biggest bang from their historical programming.

Will this "back to the future" approach to selection persist, even when our day-to-days and our TV viewing return to normal? Will the 'We' driver data also return to pre-COVID 19 status? Or will consumers maintain a focus on family agreement as the key driver of TV platform choice? This is hard to predict – but data from prior crises often shows that behaviors take a long time to return to pre-crises levels. Nevertheless, we'll be fielding another study to see how this behavior is evolving through the crisis, so stay tuned for an update.

If you're interested in the study and in Streaming 360, please contact Michael Baer at michael.baer@ipsos.com

About Ipsos Media Streaming 360

Streaming 360 is a new multi-client research product that helps clients refine platform positioning, enhance marketing strategy, and improve audience targeting and acquisition. It also delivers robust metric tracking of the ever-evolving streaming landscape. The cornerstones are customizable advanced analytics and insight delivery through powerful, predictive models and online tools. The study captures the interaction of consumer behavior and attitudes, and the metrics to model intentions towards more than 50 different SVODs, AVODs and vMVPDs.