

Sentiment Insights Series



Social Distancing and Streaming



TV Viewing Takes on New Behaviours
and Characteristics with the Coronavirus

► UK EDITION

March 2020 | White Paper

Adapting to this rapidly changing environment requires the ability to quickly understand why viewers are engaging in content, beyond just traditional viewership metrics, and to interpret and adjust to those patterns in real-time.

About This Study

The impact of the coronavirus has spread to the United Kingdom and every continent around the world (Antarctica is the only region spared thus far). Outbreaks are accelerating in major cities and metropolitan areas across the UK and the collective population is being directed to avoid crowds, cancel events, stay at home and work remotely to reduce the risk of contracting the disease or infecting others. As they adjust to this new life of isolation and social distancing, people are staying inside, hunkering down and turning to television. While TV viewership is already up, today's situation is beyond what we've come to think about as binge watching. It's not voluntary or by choice. It's an extended period of content engagement to pass the time as consumers wait out the crisis.

As the entire country vacillates between being worried and bored, anxious and reconciled, TV Time, a Whip Media Company, conducted a UK-based study in March 2020. The study leverages the UK based users of TV Time App's global community of more than 13 million connected users of its TV tracking platform on both iOS and Android devices.

Between the 16th of March and the 19th of March, at the onset of the social isolation request, we set-out to take an early pulse on peoples' emotional state-of-mind and how this would impact their TV viewing habits.

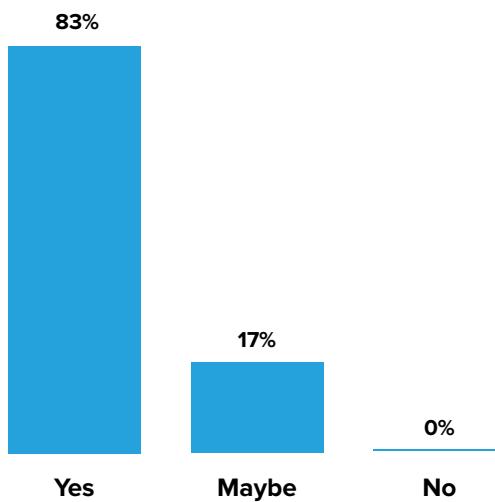
Our goal was to assess how consumers are feeling during this volatile time of self-isolation and examine not just what they're watching, but why they're watching. With the entertainment industry spending on content at an unprecedented pace, it's critical that streaming service providers better understand their consumers and offer the right content choices that are right for their platform.

Findings

We have an unprecedented opportunity to measure changes in viewing behaviour and content engagement that has been brought about in a highly accelerated manner by COVID-19. What is the trending mood and emotional sentiment now that many viewers are social distancing? So, for example, according to our recent UK study; in which 847 active users of the TV Time app participated, most indicated they are intending to increase their TV consumption during this period of self isolation. By comparison to other countries where we conducted the same study, specifically the United States, the UK was more likely to state that they were going to increase their TV consumption. This is just one example of the types of insights captured by our study.

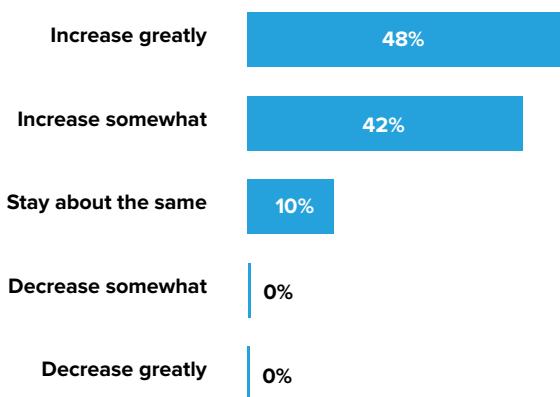
During the time that this survey was fielded, the vast majority (83%) of respondents said they were planning to socially distance/isolate to some degree, with another 17% considering it.

Are you making plans to stay home or limit your social interactions in the near future?



The **vast majority (90%)** are intending to increase their **TV consumption** during this period. At a minimum, all respondents plan to keep their current level of viewership, with no respondent saying they will decrease their TV consumption.

During this period, do you expect your TV viewing will:



So, when looking at how the UK compares to other countries and specifically the United States, on these two factors - intent to isolate and level of TV consumption - the UK was 17% more likely to state that they were going to be isolating and indexed 7% higher for planning to watch more television. This could be due to timing of the study and indicate that as time goes on and more people around the world take self-isolation seriously, it's reasonable to expect that TV levels will continue to climb and that the UK will be among one of global leaders in television consumption.

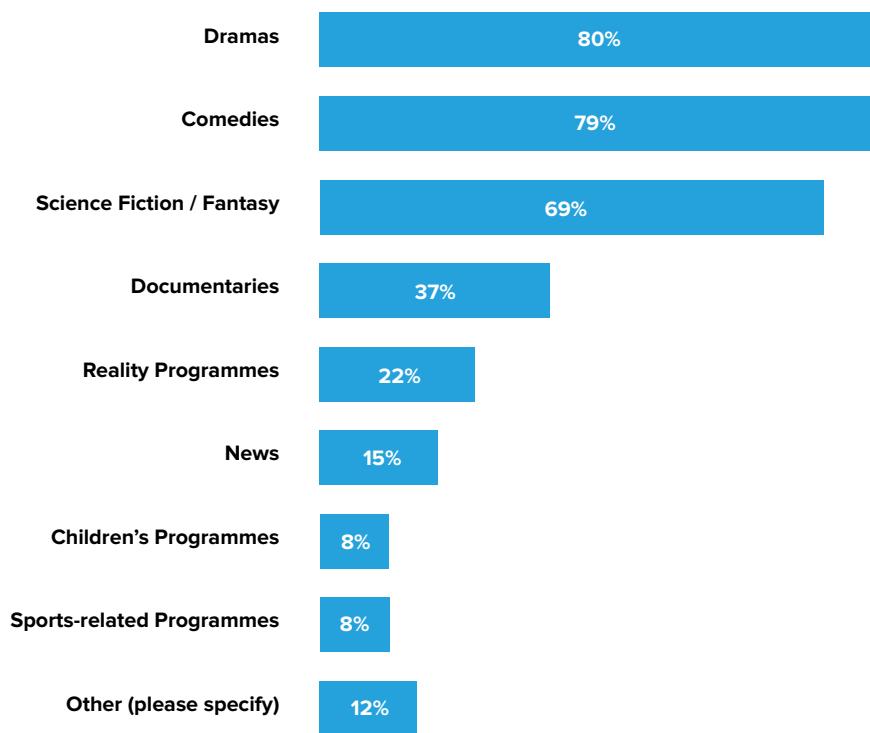
One bright spot for the consumer is that they will have an ever-expanding choice of streaming services. In November last year Apple TV+ entered the market and on the 24th of March, saw the highly anticipated UK launch of Disney+. Following on its heels, we expect to see the UK debut of NBC Universal's Peacock to Sky customers in the Summer, along with new disruptors such as Quibi. These players will join others in the already crowded streaming landscape in the UK including Netflix, Amazon, Now TV, BritBox, and Sky Go.



With the convergence of these two key factors -- the coronavirus-driven intent to increase consumption and more streaming content and services available -- TV viewership has the potential to exceed levels never seen before.

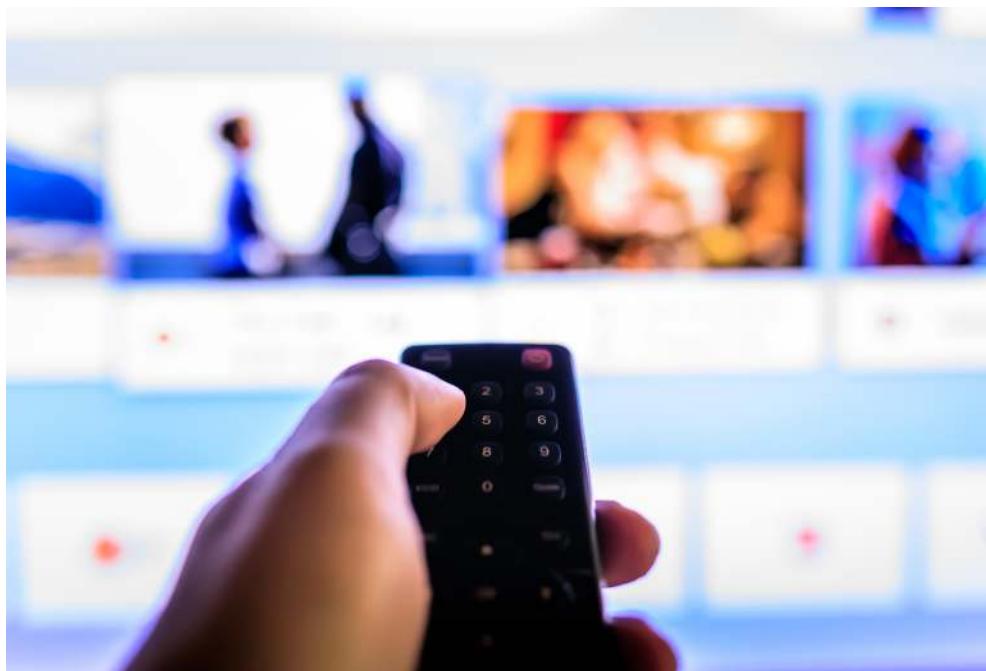
When asked what types of shows respondents were planning to watch during this time period, **the most popular choices were Dramas (80%) and Comedies (79%), followed by SciFi/Fantasy at 69%**. It appears that viewers are looking for some combination of lighter entertainment and escapism from today's ominous headlines. A notable group of viewers (22%) also said they are interested in Reality TV viewing.

What types of content do you mostly intend to watch during this period?



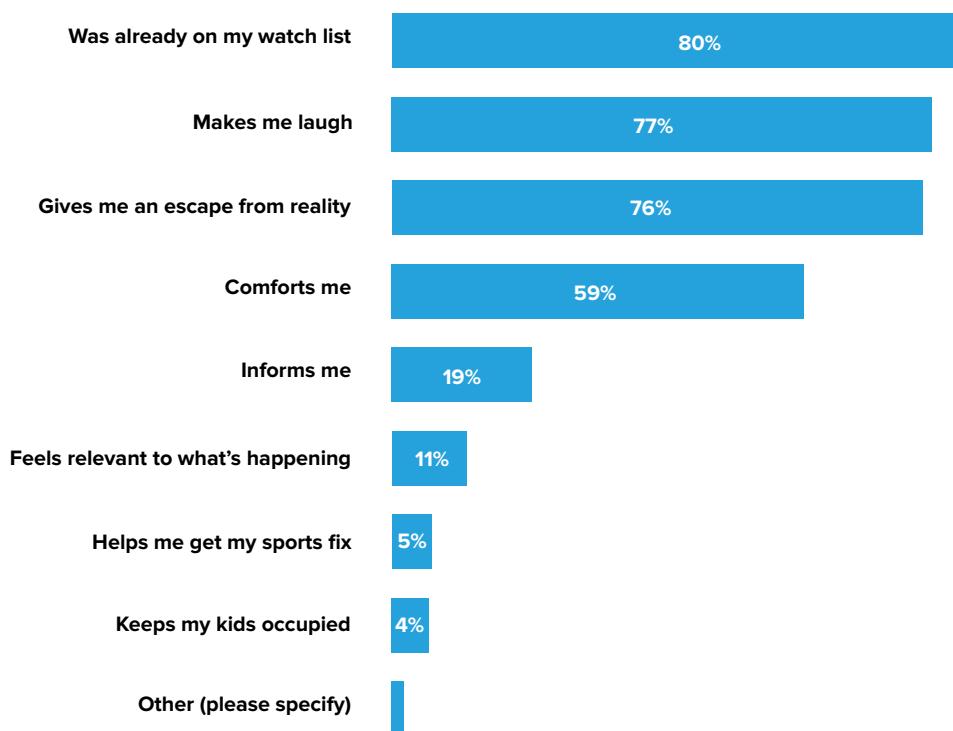
Less than 10% of respondents selected Children's Programmes as popular choices, which could be due to the timing of when the survey was fielded. School closures in the UK were not in effect until the 20th of March. Now, with country-wide school closures in full effect, this percentage is likely to increase. By comparison, in the United States where rolling school closures began in early March, 16% of respondents selected Children's Programmes as popular choices.

Only 8% selected "Sports-Related" content as most likely to watch, which again may be due to the timing of the survey and not reflecting the full impact of cancellation of live sports by the Premier League, ECB, RFU, and others. Among those who selected "Other," Anime and Thrillers emerged as popular choices.



To tap into the mood or emotional sentiment among viewers, the survey asked what was motivating their viewing choices. A full 80% of respondents said they wanted to watch shows already on their watch list, implying that this period of viewership could be used to watch shows that people have been meaning to get around to. **Other popular motivations were to give them an escape from reality (76%) and to make them laugh (77%),** with comforting them at about half (59%).

During this period, I really want to watch content that...



What is interesting to note is that both staying informed of the coronavirus crisis (19%) and watching content that “feels relevant” (11%), are less popular. According to the “2019 New Consumption Study” from Ofcom, 66% of adults in the UK get news online. Our findings clearly indicate that consumers are largely turning to TV for entertainment.

Implications

Consumer sentiment will no doubt evolve in the coming weeks as more and more people self isolate in their homes. **Streaming services are poised to be among the biggest beneficiaries to capture consumers' viewership and engagement.** Disney+ has included *Frozen 2* in its line-up earlier than planned. Additionally, as the coronavirus takes its toll on the cinema business (national chains such as Cineworld, Vue Cinemas, and Odeon have shut down), consumers are being driven to in-home streaming entertainment. In a break from the established release windowing, content providers such as NBCUniversal have announced that they will make their movies available in-home, on-demand on the same date as their global theatrical releases. This could be the beginning of a large-scale shift to give consumers faster access to box office hits in the home in a post-coronavirus age.

What other announcements will follow to captivate sports enthusiasts who can no longer watch live events? Or remote workers who want content in the background while checking periodic news updates? And Gen Z and younger audiences who need entertainment with school closures?

Clearly **the coronavirus era is fueling different types of viewing habits and new content release strategies to satisfy an ever more connected consumer.** It will also be interesting to see how services such as Quibi, which will come to market in the second half of 2020 with a new concept of short form content of no more than 10 minutes, perform in this environment. We may also see other strategies, such as content providers capitalizing on their libraries by bringing classics and other popular programming to new audiences. In essence, using diverse and new content choices to attract consumers who may not normally be watching streaming TV.

Today's "**social distancing and streaming**" dynamic is beyond what we've come to think about as **binge watching**. It's redefining the viewing landscape. Based on the early indicators of the UK survey, it's reasonable to expect that TV levels will continue to climb and that the UK will be among one of global leaders in TV consumption. Adapting to this rapidly changing environment requires the ability to quickly understand why viewers are engaging in content, beyond just traditional viewership metrics, and to interpret and adjust to those patterns in real-time. The TV Time's app uniquely captures these sentiments to inform an industry in a state of flux as never before.

ABOUT TV TIME

TV Time, a Whip Media Group brand, is the world's largest TV and movie tracking app for consumers. Every day, nearly a million people use TV Time to keep track of the shows and movies they're watching, discover what to watch next and engage in a global community of more than 13 million registered fans.

ABOUT WHIP MEDIA GROUP

Whip Media Group's products, including Mediamorph, TV Time and TheTVDB, offer a data-driven integrated cloud solution that empowers the world's leading entertainment organizations to intelligently acquire, distribute and monetize their content. Together, our companies track billions of consumer actions and financial transactions that accelerate innovation for buyers and sellers of content, in real-time.

For more information, visit whipmedia.com

