

The OTT Binge-Watching Phenomenon

White Paper | Kauser Kanji

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Key Highlights

- Binge-watching isn't reserved only for weekends, special occasions, or tentpole launches from the major streamers. Exactly 50% of our survey respondents like to binge most or all of their entertainment shows.
- 8 out of 10 viewers prefer all episodes of a new (or returning) show to be made available for binge-watching rather than dropping on a weekly basis. This finding has strategic implications for service providers and particularly broadcasters that come from a linear-release heritage.
- And 81% of our sample said that the availability of bingeable content was an important factor when thinking about subscribing to OTT services. 31% of people have churned from a service because of a lack of bingeable content.

Introduction

If you've ever had a *Star Wars* night on VCR, a *Friends* fest on DVD, or gotten lost in a *Lost* box set on Blu-ray, you'll know that TV and movie binge-watching isn't a new phenomenon. What's different now is the wide availability of titles to potentially binge on, the mode of consumption – via online streaming – and the scale both in terms of the number of people who enjoy watching multiple episodes of a title and how often they do it.

Whip Media, together with VOD Professional, wanted to learn more about viewers' current bingeing habits. To do that we canvassed the opinions of consumers through Whip Media's TV Time app, which is used by 19 million global users to keep track of the shows and movies they're watching, engage in spoiler-free reactions, and discover new content.

How, we asked, did they define a binge-watching session? What genres did they particularly binge on? Who did they binge-watch with? And were they aware of bingeing more over the past 18 months when global lockdowns may have led to more time at home?

Overall, we gathered 32,741 responses to our survey across seven countries: France, Germany, Italy, Spain, Sweden, the UK and the US. 92% of the respondents were aged 18-54.

The results, which are summarized over the following pages, may have important implications for the content release - as well as customer acquisition and retention - strategies of OTT streaming services.

32,741

survey respondents
across **seven countries**

7 / 10

think that binge-watching =
four+ episodes of a show
in a single session

87%

Serialized drama is the
genre most likely to be
binge-watched by viewers

50%

of viewers binge-watch
most or all their
entertainment shows

45%

of viewers enjoy the experience
of **watching multiple episodes** in
an accelerated time period

8 / 10

viewers prefer all episodes of a new show (or a
new season of a show) to be **made available to
watch** – rather than dropping on a weekly basis

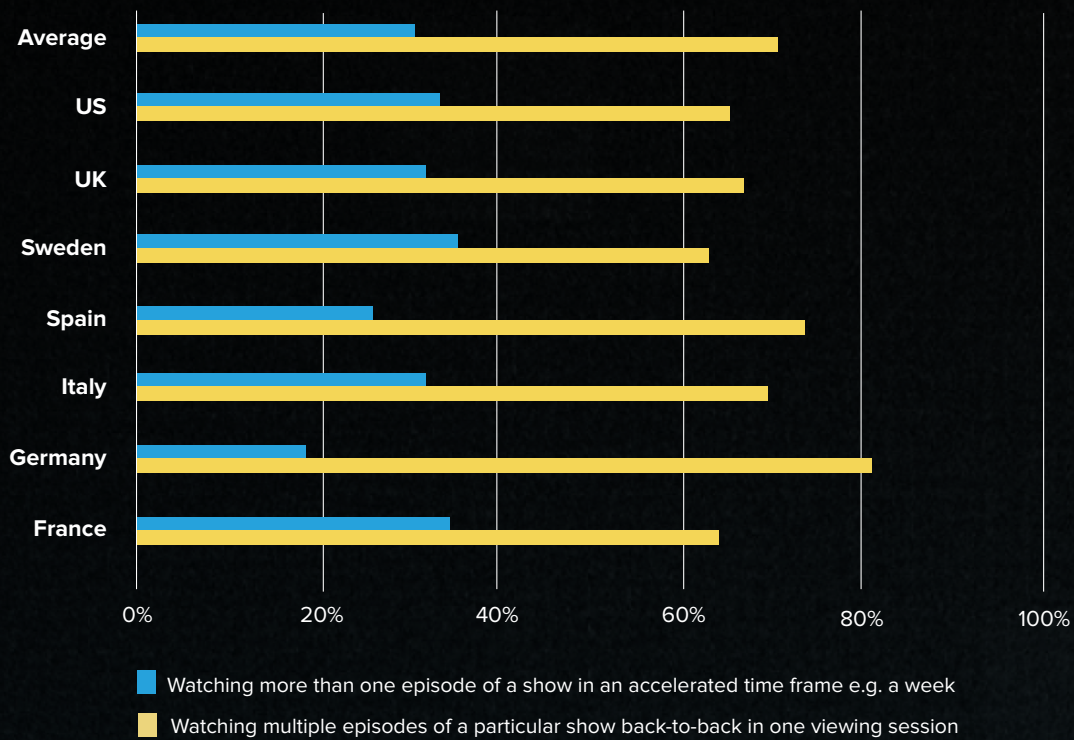
Definition of Bingeing

A Netflix survey from 2014 found that 73% of its sample considered binge-watching to mean “watching between two and six episodes of the same TV show in one sitting.” We can now update and refine this definition.

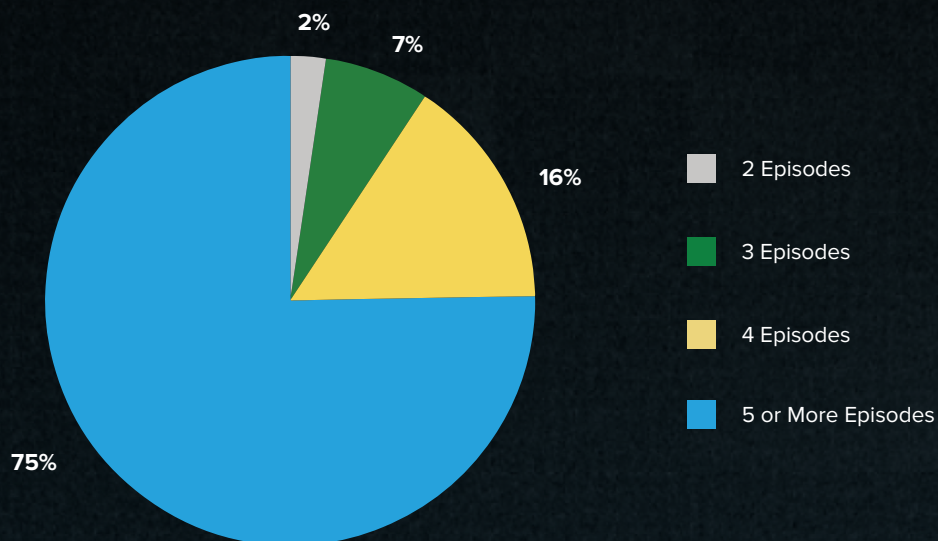
- 70% of our own 32,741 respondents think that bingeing means watching multiple episodes in one viewing session compared to 30% that believe it also applies to watching several episodes over a week
- 74% of the former think that you need to watch 4+ episodes in one session for it to count as bingeing
- Alternatively, 91% of the latter group say bingeing is also watching 4+ episodes in a week
- There are some interesting regional nuances too. 41% of Swedes, for example, consider bingeing as watching as few as 3 episodes in a single session. At the other end of the scale, 60% of Italians count 5+ episodes as a binge-session
- By age group, whereas 39% of over-55s think that 3 episodes is enough to be bingeing, only 16% of 18-25 year olds agree



What's Your Definition of Bingeing?

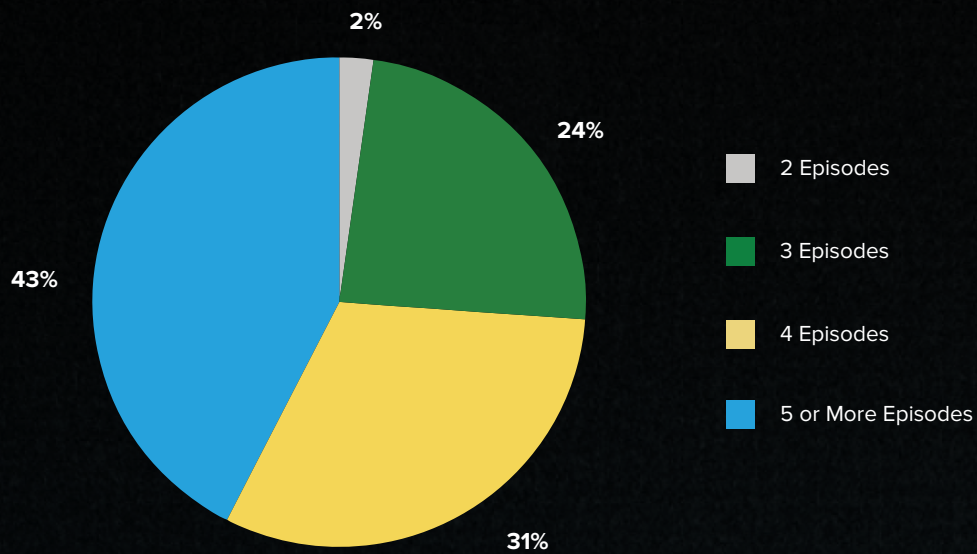


How Many Episodes in the Course of a Week = “Binge-Watching”?



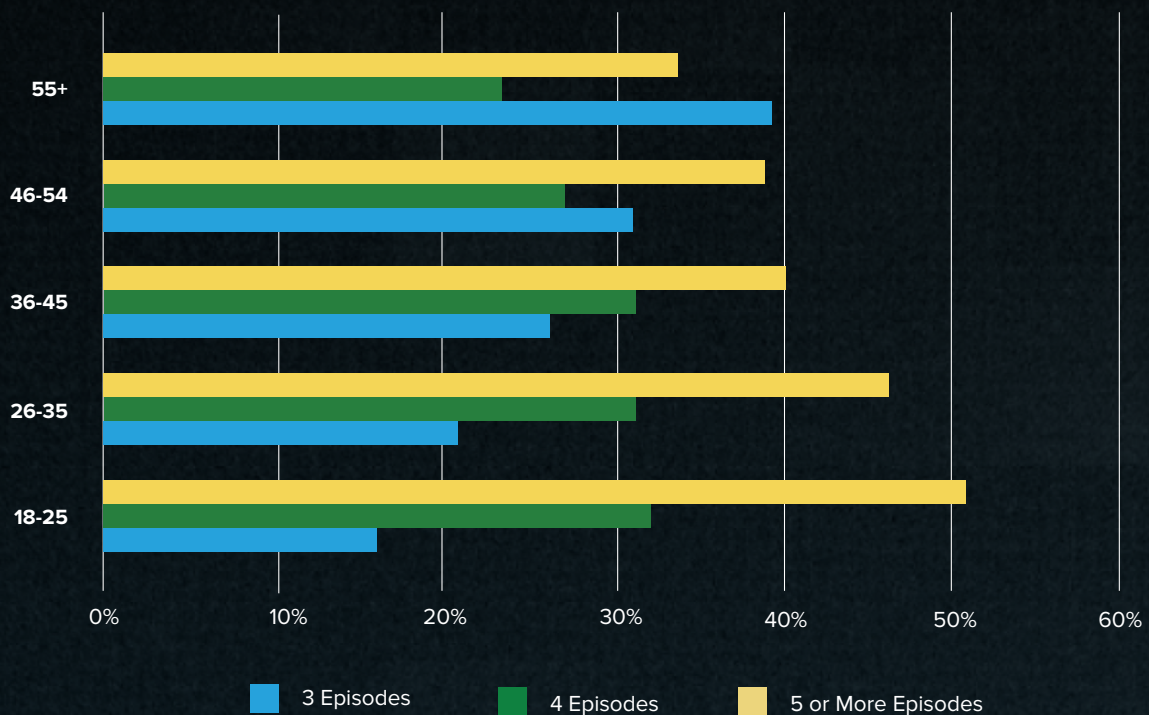
Among those who defined binge-watching as consuming multiple episodes in an accelerated time period, eg a week

How Many Episodes in a Single Viewing Session = “Binge-Watching”?



Among those who defined binge-watching as watching multiple episodes in a single viewing session

How Many Episodes in a Single Viewing Session = “Binge-Watching” (by age group)



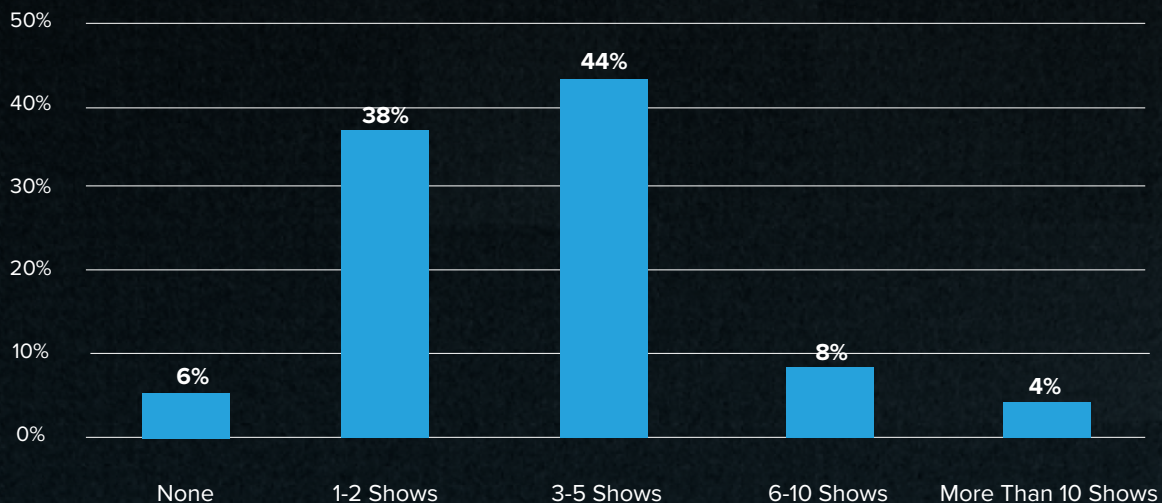
Scale of Bingeing

How widespread is binge-watching amongst AVOD users and SVOD subscribers? We ask this not just to satisfy any sense of latent curiosity but because it has multiple knock-on effects to OTT service providers – about how quickly viewers might exhaust their content catalogs (and maybe subsequently churn), their catalog replenishment strategies, and modelling ARPU.

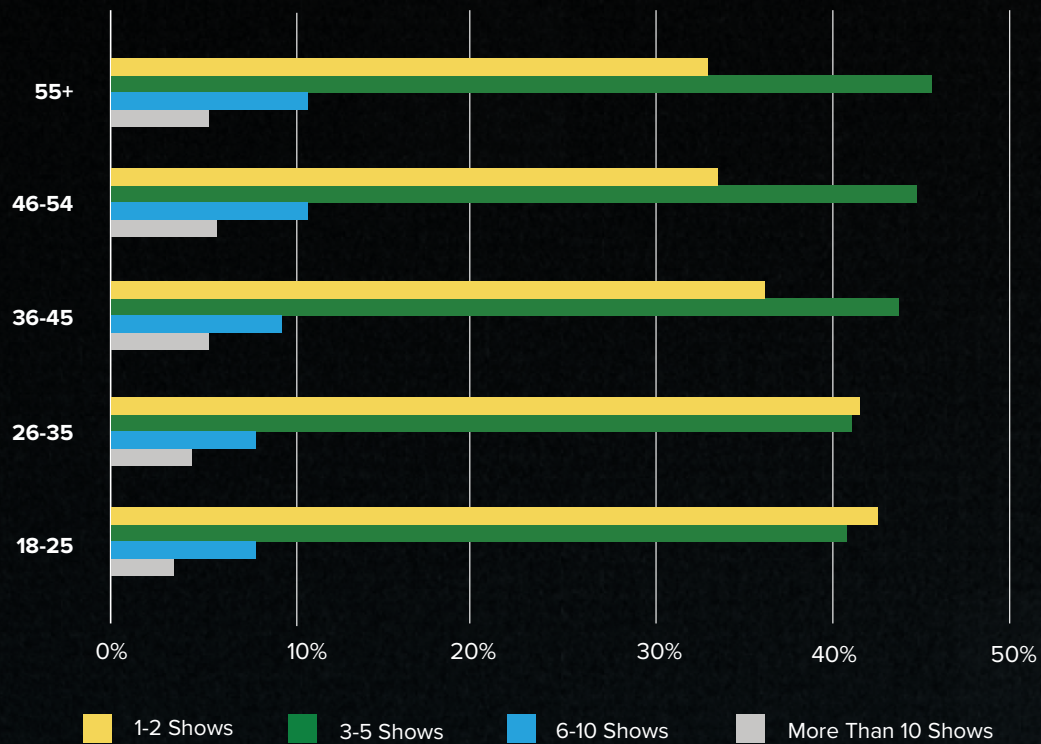
Our survey respondents told us that:

- On average, across all countries, 38% of them had binged 1-2 shows over the past month
- 44% had binged 3-5 shows in the same period
- And, significantly, 8% had binged 6+ shows. Indeed, 4% had binged over 10 shows
- Age variations were even more surprising. Whereas the number of people that had binged 1-5 shows was fairly uniform across our age cohorts (77 – 83%), we found that the biggest bingers of 6+ shows were 46–54-year-olds (17%) and over-55s (16%)
- And by country, the biggest bingers – who watched 10 or more shows over the previous month – were the Swedish (6.8%) followed closely by the US (6.3%)

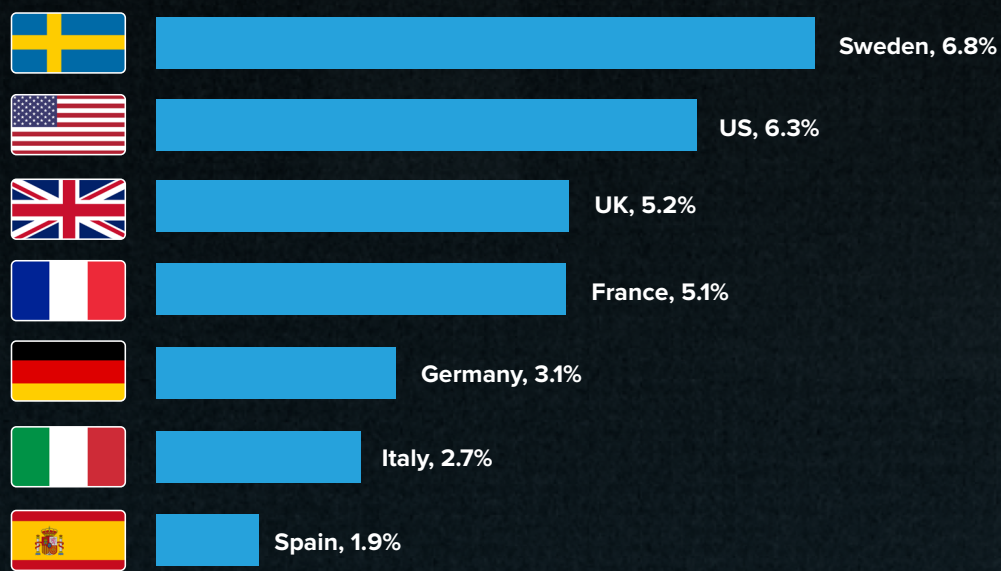
How Many Shows Have You Binged in the Past Month?



How Many Shows Have You Binged in the Past Month (by age group)?



The Biggest Bingers: Percent Who Watched More than 10 Shows in the Past Month

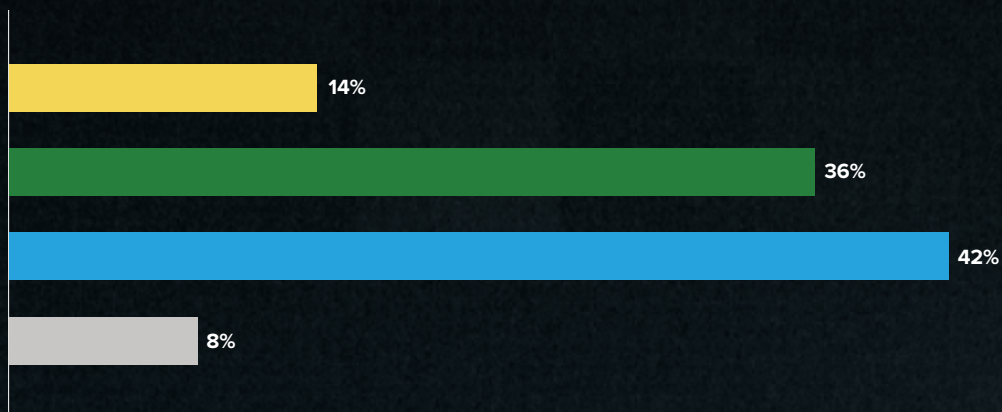


Bingeing Habits

Do people binge on TV shows and movies because they're easily available to watch; because, as humans, we can't resist the lure of instant gratification; or because the major streaming services have conditioned us into watching more and more through content recommendation and features like auto-play next episode? A detailed psychological analysis isn't in the scope of this paper (although we think it's well worth exploring) but, for now, we can say without understatement that viewers sure like to binge.

- 42% of our respondents told us that they binge-watched **SOME** of their entertainment shows, with Italians (54%) and the Spanish (54%) favoring this preference
- More significantly, however, 50% of the sample said that they binged **ALL** or **MOST** of their entertainment viewing
- Once again, the Swedish were the leaders here (63%) - they preferred the **ALL** or **MOST** options - whereas the French were relatively abstemious with 14% of respondents saying they **NEVER** or rarely binged
- And by age, 45% of 18-25 year-olds were the biggest cohort in the **ALL / MOST** camp vs. 41% of over-55s

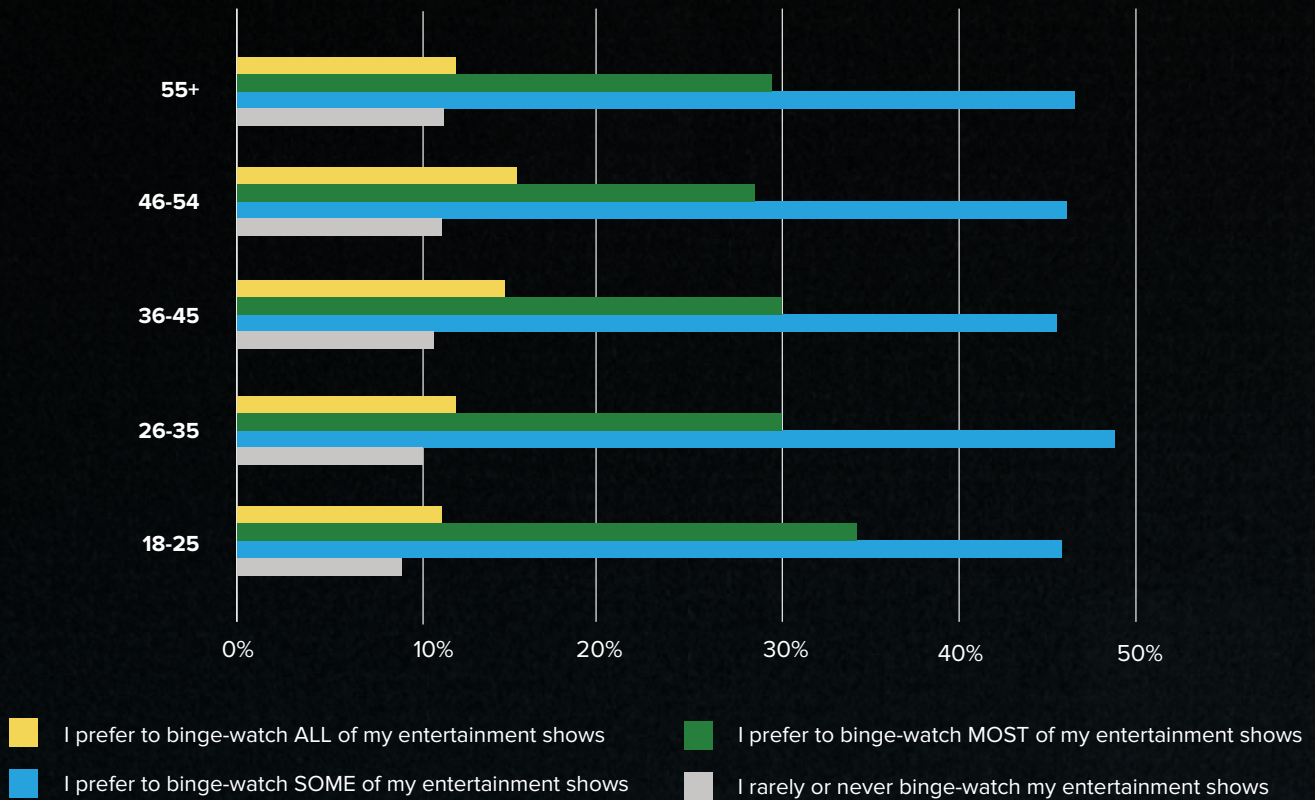
How Do You Like To Watch?



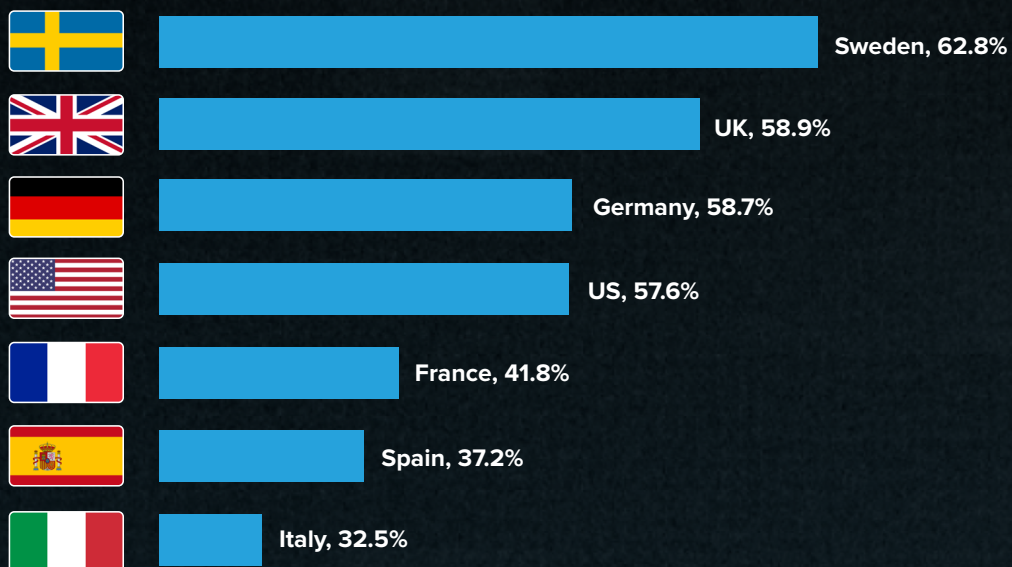
■ I prefer to binge-watch **ALL** of my entertainment shows
■ I prefer to binge-watch **SOME** of my entertainment shows

■ I prefer to binge-watch **MOST** of my entertainment shows
■ I rarely or never binge-watch my entertainment shows

How Do You Like To Watch (by age group)?



Prefer to Binge-Watch ALL or MOST Entertainment Shows (by country)



What Influences Bingeing?

In our survey we asked respondents to choose from a range of factors that, consciously or otherwise, influenced them to binge-watch. Options included availability of content on their favorite streaming platform, catching up on past seasons of a show, wanting to stay current with fan conversation or even just boredom / ennui.

We found that:

- The biggest influencer to bingeing, 64% across all countries, was that respondents were “really engaged” with a show. For OTT service providers, this begs the question: are viewers engaged with a show because they can binge-watch it or do they binge-watch because they’re engaged (which comes first?)
- In line with Sweden being the biggest bingers, and expressing the most emphatic preference for binge-watching ALL or MOST of their entertainment shows, 55% of our Swedish sample also said they binged because they actively enjoyed the experience of watching multiple episodes
- FOMO (or the fear of missing out) seems to be less of an influencing factor with only 12% of respondents choosing this option (wanting to stay current with fan conversation)
- And a full 18% say that they binge out of boredom. Again, this has ramifications for OTT service providers in terms of subscriber inertia, potential churn as well as search, recommendations and user interface navigation

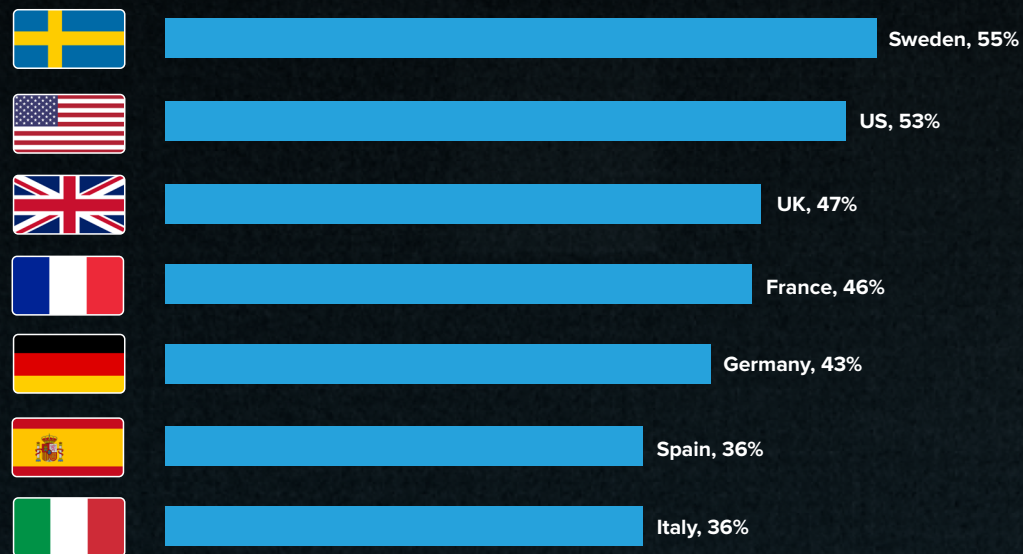
Why Did You Binge-Watch?



I Binge-Watch Because I'm Really Engaged with the Show (by country)



I Enjoy the Experience of Watching Multiple Episodes (by country)



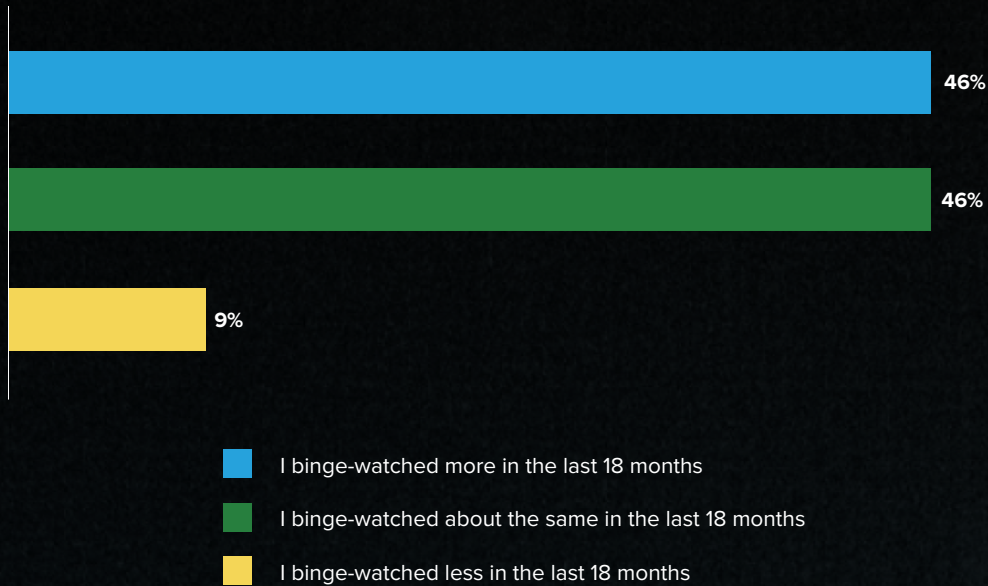
Bingeing During National Lockdowns

Many OTT service providers reported that viewing on their platforms had rocketed during the first pandemic-related national lockdowns in spring 2020. While audience figures eventually settled to a new plateau, we wondered how our respondents' TV habits had changed over the past 18 months.

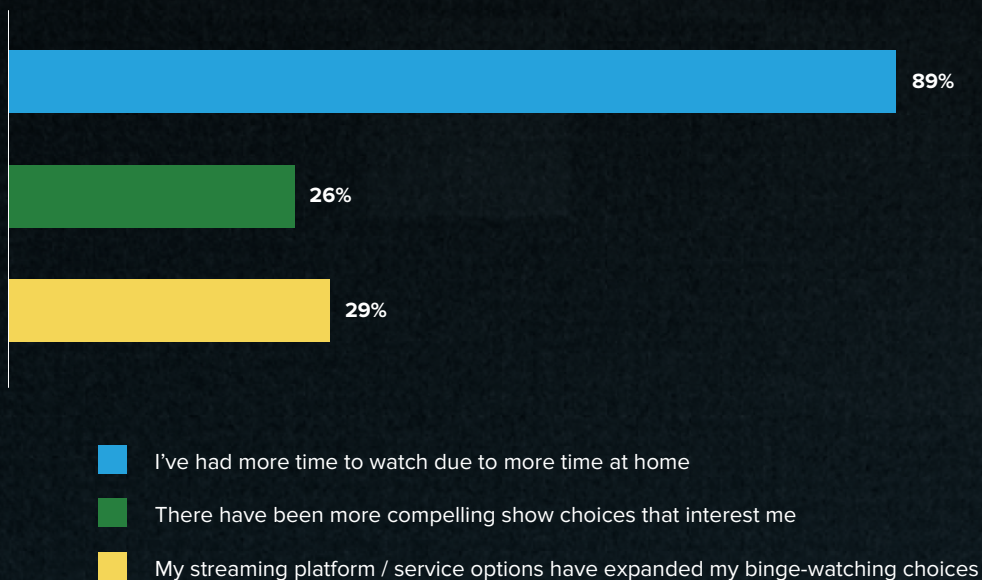
- 46% of our respondents told us that they had indeed binge-watched more content during the period. The biggest increases in binge-viewing were in Italy (57%), the UK (55%) and the US (54%)
- A similar number, 46%, said that they binge-watched about the same over the past 18 months as they had done before
- 8.5% of our sample said that they binge-watched less over the period
- When asked why they binge-watched more, unsurprisingly the biggest factor was spending more time at home (89% averaged across all countries)
- 29% also said they watched more because their streaming platforms have expanded their binge-watching choices. This makes sense as the major streamers have noticeably exploited the long tail in their catalogs and successfully surfaced foreign language shows like *Money Heist*



Binge-Watching During Lockdowns



Why Have You Binge-Watched More in the Past 18 Months?



The Types of Shows That People Like To Binge

It will come as no surprise that serialized drama shows – with continuing storylines and the use of dramatic devices like cliffhangers and wide character arcs – are, according to our respondents, the types of content they most like to binge on. It was interesting to us, however, that:

- Our sample, across all countries, were less likely to binge on competitive reality shows like *Britain's Got Talent* or *Dancing with the Stars*. Is that, we wondered, because these titles lose currency as they age and / or that any audience interactivity – like public voting – is negated when watching on-demand?
- Lifestyle / Food / Travel and Home / Garden shows were also less binge-popular. Our expectation had been that since many audiences had spent so much time at home (and, apparently, been cultivating their sourdough recipes or baking banana bread) this type of content might do better. Maybe this genre is less designed to be binge-worthy?



The Types of Shows That People Like To Binge On



Top Bingeing Country In Each Genre



Content Release Strategies

Netflix, arguably, kicked off modern binge-watching behaviors by pioneering the simultaneous release of all episodes of the new season of a show – a strategy that boosted the global success of titles as diverse as *House of Cards*, *The Crown*, *Emily in Paris* and *Bridgerton*. Amazon followed suit with its own award-winners like *Transparent* and *The Marvelous Mrs. Maisel*.

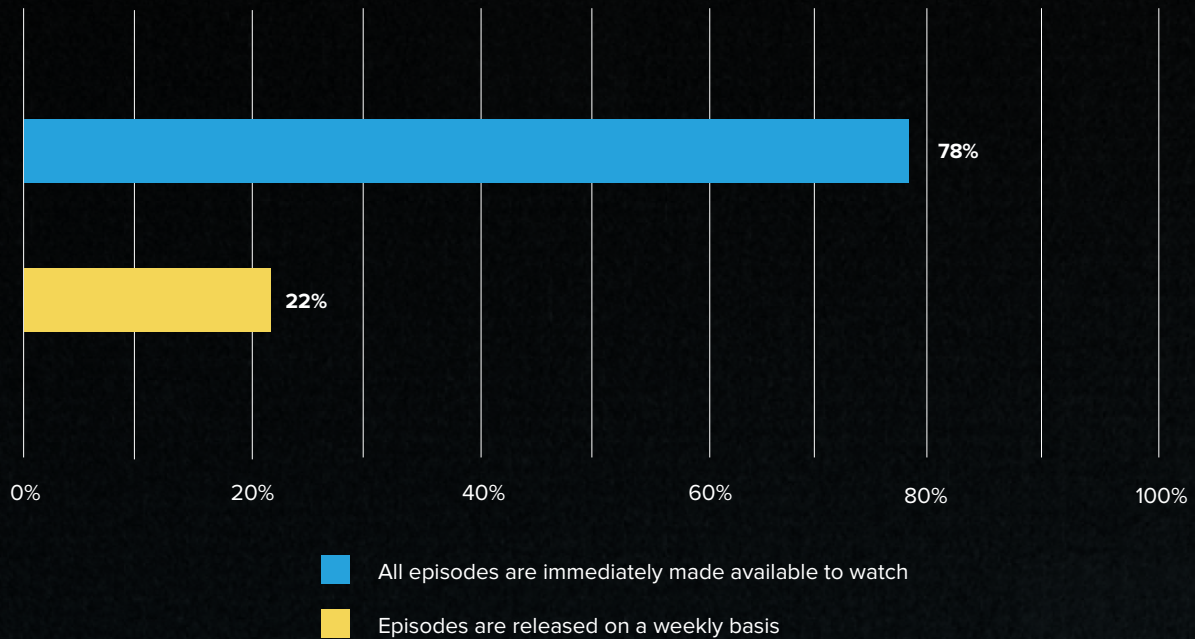
Newer streamers have followed suit but sometimes reverted back to a more linear schedule. Disney, for example, streamed weekly episodes of *Loki*, *WandaVision* and *The Mandalorian*; Apple has done the same with *Ted Lasso* and *The Morning Show*.

So, which experience do our respondents prefer?

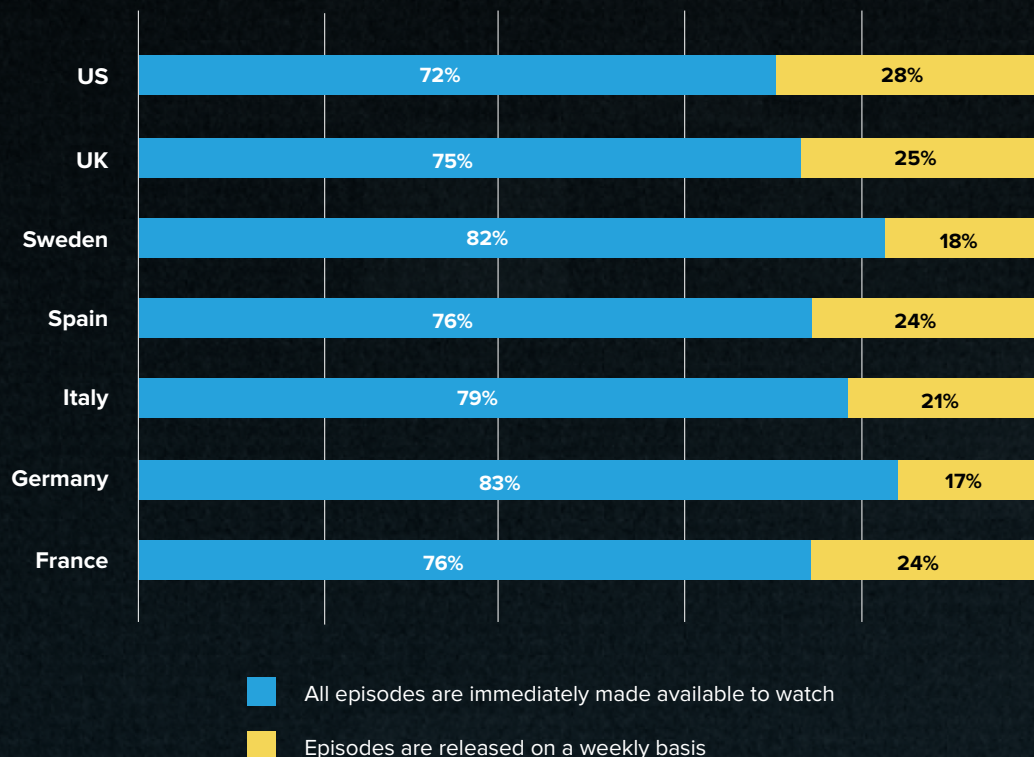
- 78% told us that they favored simultaneous – rather than weekly – release of all episodes
- Germans (83%) were the most emphatic in this preference; Americans (72%) were the most easy-going
- We found no significant differences in opinion among our age cohorts. 76% of 18-25 and 26-35 year-olds preferred a full-season release as did 80% of 46-54 year-olds and 79% of over 55s



Content Release Strategy - Which Do You Prefer?



Content Release Strategy By Country - Which Do You Prefer?



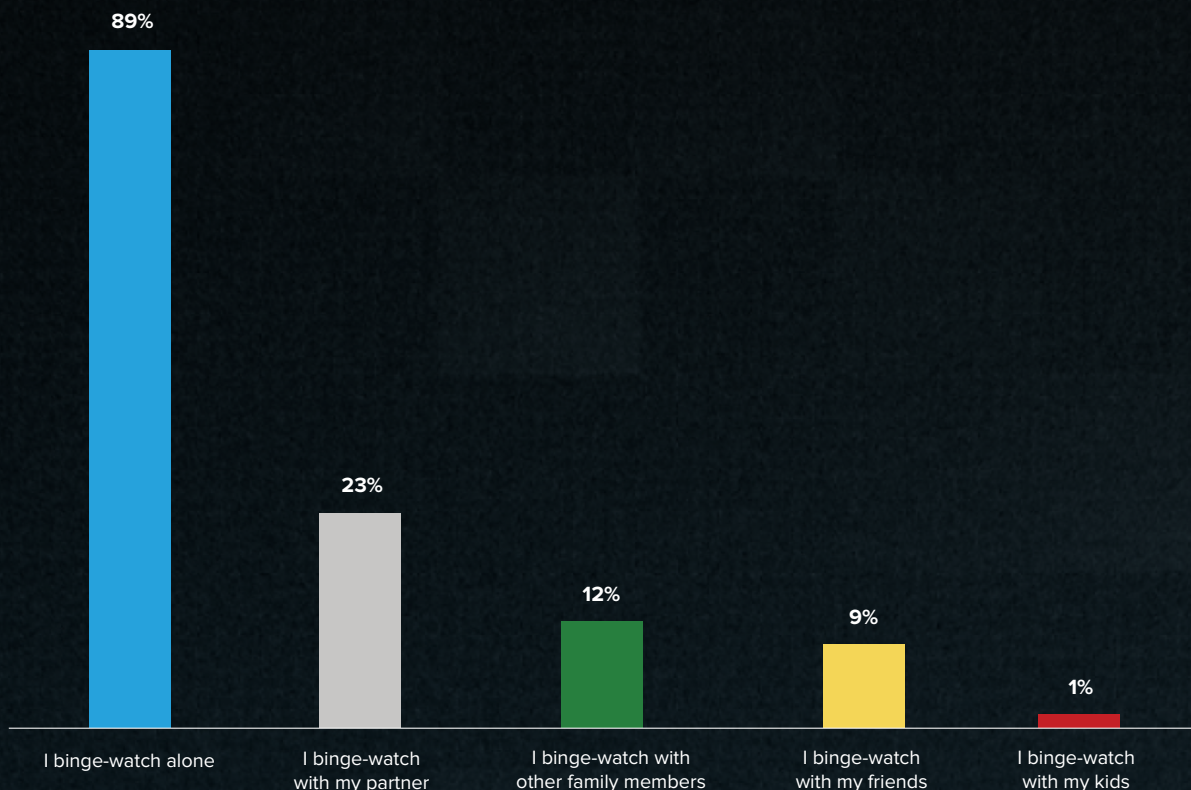
Who Do People Binge With?

This is one of the questions we were most interested in. Is binge-watching a solitary activity or can the experience of feasting on multiple episodes of a show be enhanced by sharing with others?

Our sample told us that:

- 89% *did* mostly binge-watch alone but this declines with age from 94% among 18-25 year-olds to 73% for over-55s
- 23% also liked to binge with a partner, 12% with other family members, 9% with friends and 1% with their kids
- Italians were the biggest lone-bingers (93%) but were also the most familial (16%) and friendly (12%). The Swedish were the most connubial (30% watching with a partner). The US was the nation most likely (4%) to binge-watch with children
- And whilst 81% were aware of new “Watch With” features on the major OTT platforms (suggesting that there has been some cut-through in terms of messaging), only 19% have actually used that functionality

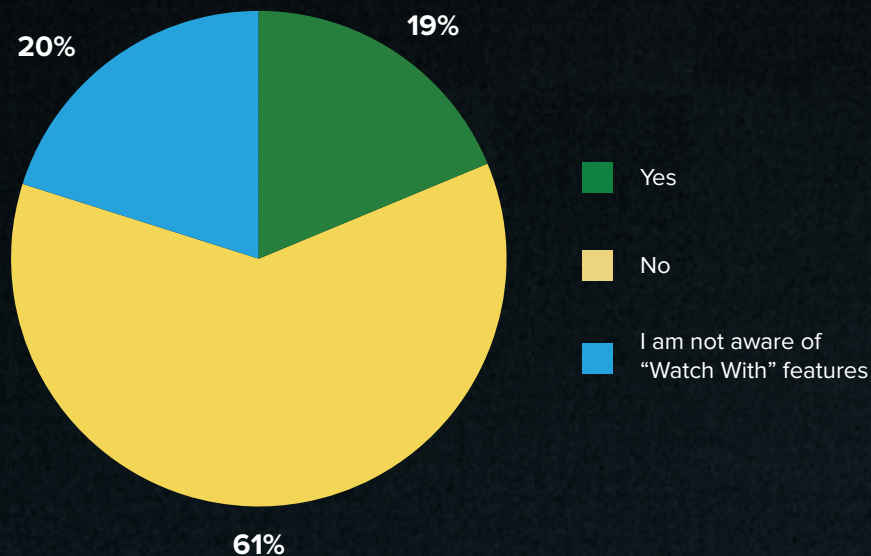
Who Do You Binge-Watch With?



Top Country By Who Do You Binge-Watch The Most With



Have You Ever Used Any “Watch With” Features on Netflix, Amazon, or Other Streaming Services?



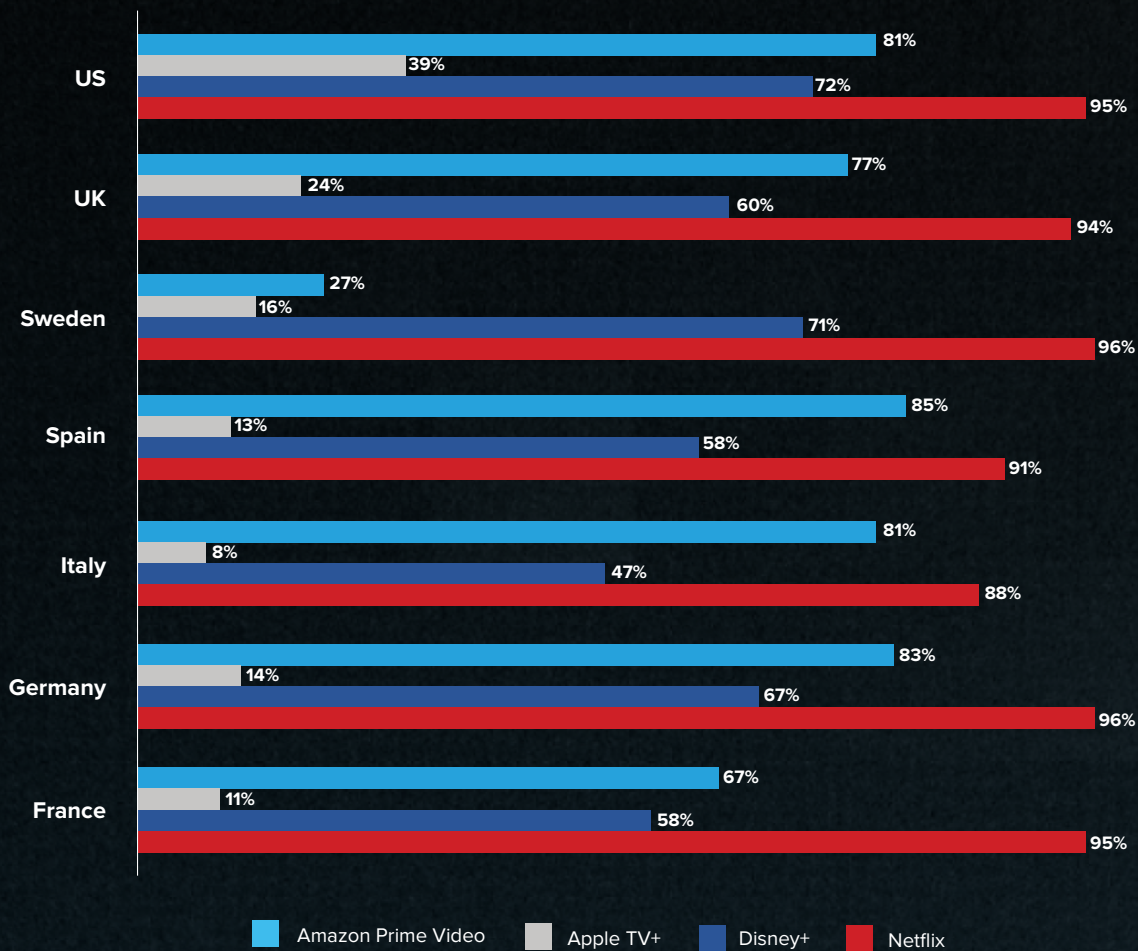
Most Popular Streaming Services by Country

Our survey presented each respondent with a list of up to 15 streaming services available in their country. This included the major OTT service providers like Netflix and Amazon Prime as well as regional streamers like, for example, BBC iPlayer in the UK, SVT Play in Sweden, Hulu in the US and Salto in France.

Which services, we asked, did they subscribe to? We found that:

- Only four platforms were present in all seven of the countries that we appraised. They are Amazon Prime Video, Apple TV+, Disney+ and Netflix
- Of those, Netflix is the big winner with 94% of our respondents saying that they were subscribers (or users). Amazon Prime was second (72%), Disney+ third (62%) and Apple TV+ fourth (18%)

Do You Subscribe To... (by country)?



For further breakdowns of popular streaming services – by country – please reach out to Whip Media

Subscribing to - and Churning From - OTT Services Because of Bingeable Content

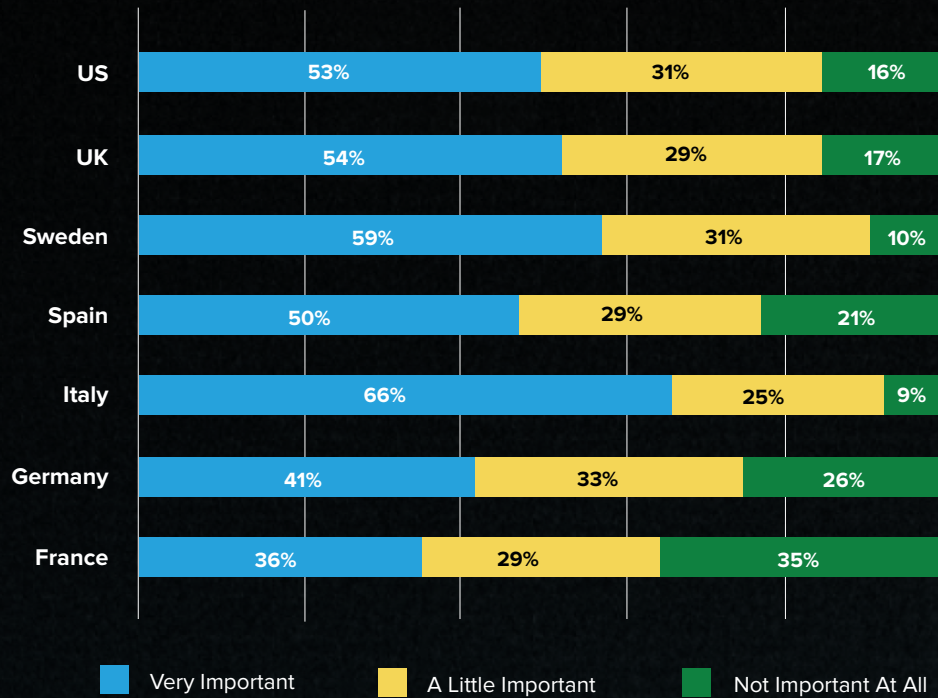
Although on-demand video has only been available to viewers for around 15 years (YouTube launched in 2006 as did Hulu; BBC iPlayer came on to the scene in 2007 and Netflix was positively tardy, making its OTT appearance only in 2011), it's hard to imagine going back to a world of scheduled, linear TV. Viewers now expect to be able to watch titles where they like, when they like and on their preferred devices.

That said, do consumers need OTT services to offer bingeable content before they'll consider becoming subscribers? Equally, would they, could they, churn if there's not enough binge-worthy content to suit their viewing habits?

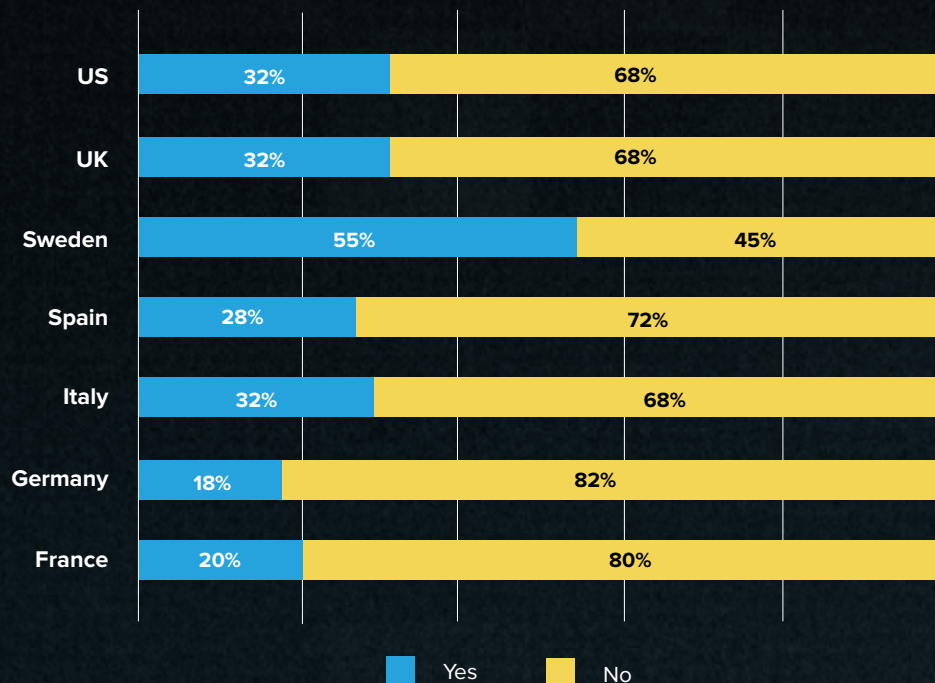
- 50% of our sample said that it was very important that OTT services have a catalog of bingeable content in their decision to subscribe. A further 30% said that it was a little important
- Only 19% of people said that it's not important at all
- The French (35%) were the most laissez-faire about this whilst Italians (66%) were the most in need of bingeable content
- Despite this, only 31% of people have unsubscribed from a service because of a lack of bingeable content (we say "only" advisedly. If 30% of a streamer's audience might churn because of a lack of content, that's a pretty big deal)



How Important Was The Availability Of Bingeable Content In Your Decision To Subscribe To An OTT Streaming Service?



Have You Ever Cancelled an OTT Streaming Subscription Because of a Relative Lack of Bingeable Content?



About Kauser Kanji | VOD PROFESSIONAL

Kauser Kanji has been working in the OTT industry since 2005 and has formerly held senior roles at NBCUniversal, Virgin Media and the British news broadcaster ITN. He started his consulting company, VOD Professional, in 2011 where he writes analyses and reports for clients and hosts a weekly debate show, via Zoom, called *OTT Question Time*. Kanji has successfully completed consultancy projects for Netflix, the BBC, Sony Pictures, A+E Networks and UKTV as well as a range of national and international broadcasters from all over the world.

ABOUT WHIP MEDIA

Whip Media is transforming the global content licensing ecosystem with a market leading enterprise software platform that centrally connects data, processes and teams throughout the digital distribution journey. Powered by proprietary data and predictive insights, we enable the world's top entertainment organizations to efficiently distribute, control and monetize their TV and movie content to drive revenue and direct-to-consumer growth.

ABOUT TV TIME

TV Time is the world's largest TV and movie tracking app for consumers. Every day, over 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 19 million registered fans.

For more information, visit whipmedia.com

METHODOLOGY

Active users (ages 13+) of Whip Media's TV Time were surveyed in-app among 7 countries from September 17-20, 2021, as follows: US (n=5,504), UK (n=2,915), France (n=6,201), Germany (n=1,798), Italy (n=9,160), Spain (n=6,413), and Sweden (n=750).