



inMOBI

Impact of COVID-19: Video Streaming Landscape

**with Robyn Meyers, Jeremy Huber
and Matthew Kaplan**

Welcome!

- **Logistics:** 30 minutes, questions at the end, you will get a recording and a copy of the slides
- **Brands reviewed:** Netflix, Hulu, Amazon Prime Video, Pluto TV, Quibi, Disney+, Tubi TV, HBO
- **Purpose:** To better understand consumer behavior and the role of mobile for video streaming platforms in these unprecedented times, and to highlight how video streaming service providers should be reaching and engaging mobile audiences.

What We'll Discuss Today

- **Speakers and Data Sources**
- **Content Trends**
- **What People are Watching**
- **How People are Watching Video**
- **What Media and Entertainment Need to Do to Succeed**
- **Navigating the Future**
- **Q & A**

Speakers



Robyn Meyers

VP, West Coast Brand
Partnerships at InMobi



Jeremy Huber

Head of Intelligence
Solutions, N.A. at InMobi



Matt Kaplan

Content Marketing
Manager at InMobi

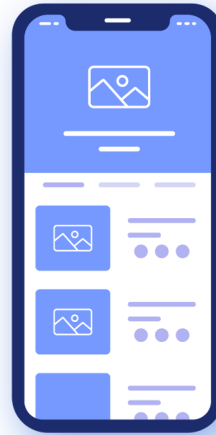
InMobi Intelligence Solutions: Data Overview

Observed: Who, What, When and Where



1st-Party Carrier Data

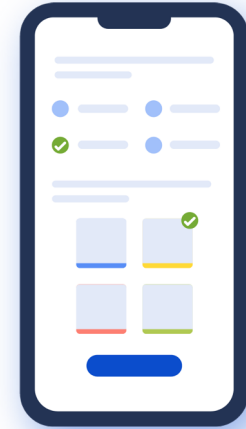
30+ Million Person Panel
24/7 Mobile Behaviors
Mobile Website Visits
App Install, Usage, Uninstalls
Location Signals (600+ daily pings)
Currently U.S. Only



App SDK Data

GPS Location Signals
App and Device Usage
O/O apps + SDK

Stated: Why



Stated Data (Survey)

from 1.3 billion users globally
across 30,000+ partner apps.
270MM in the U.S – 5,000 partner apps



Experian-verified data
deterministic demographic and
psychographic segments

INMOBI

People Are Watching More As We're All Stuck Inside



In May, **18%** of Americans between 26 and 35, and **16%** of Americans between 18 and 25 said they are **spending more on entertainment now.**



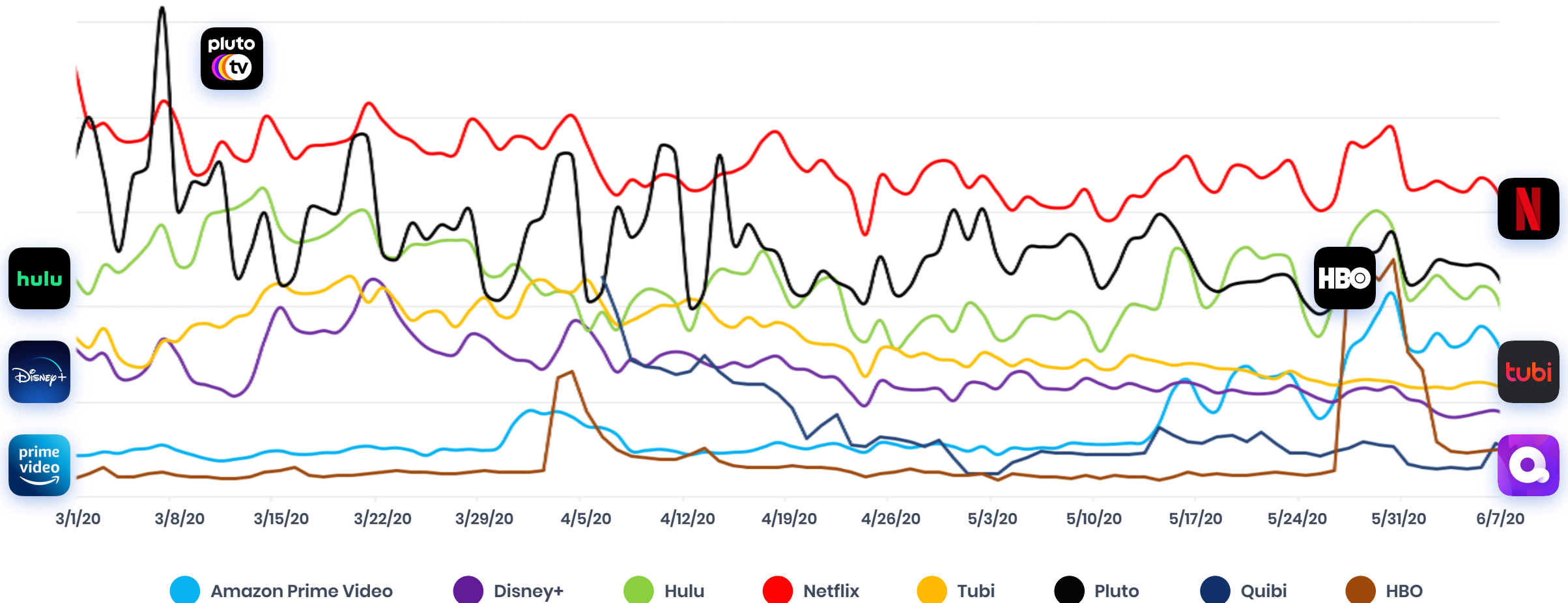
31% of Americans in June said they are streaming more TV now, **up from 25% in March.**



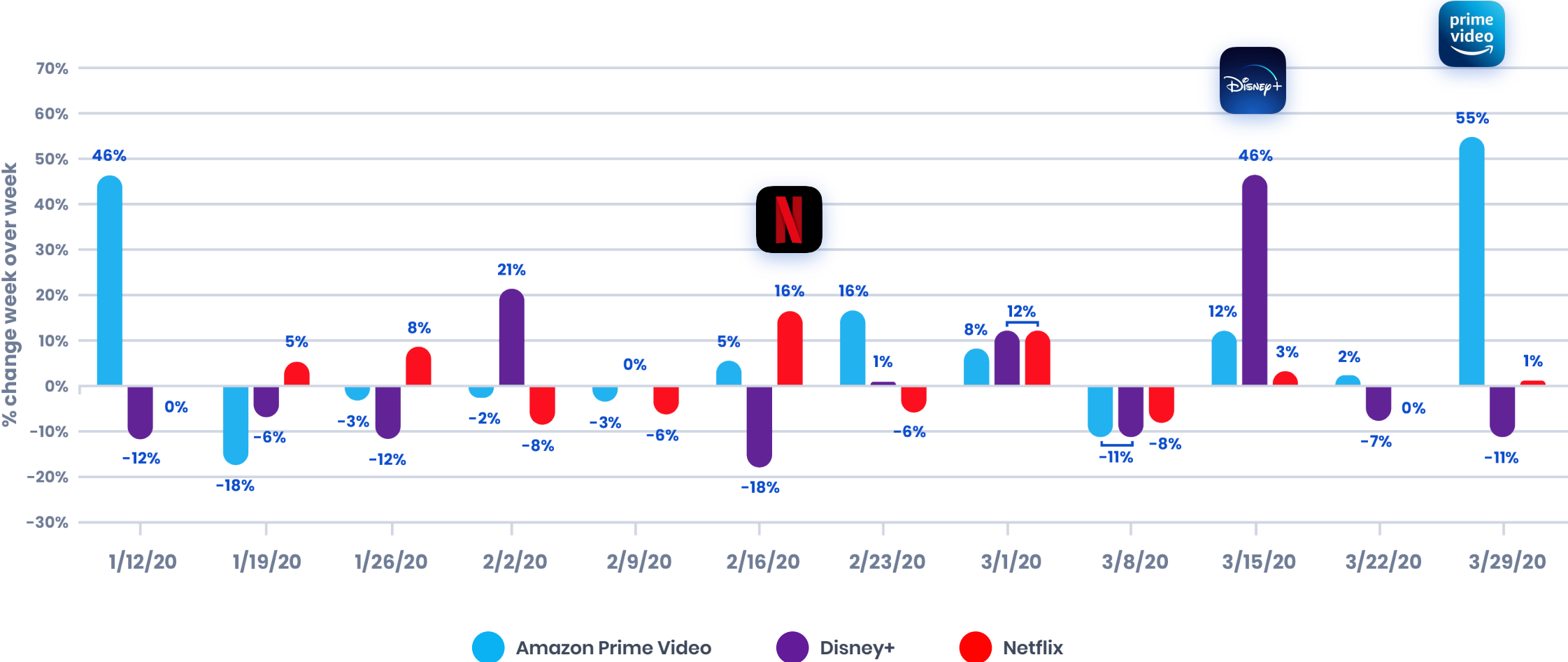
One in four Americans say they are **using entertainment apps more frequently of late.**

Mobile Device App Install Trends

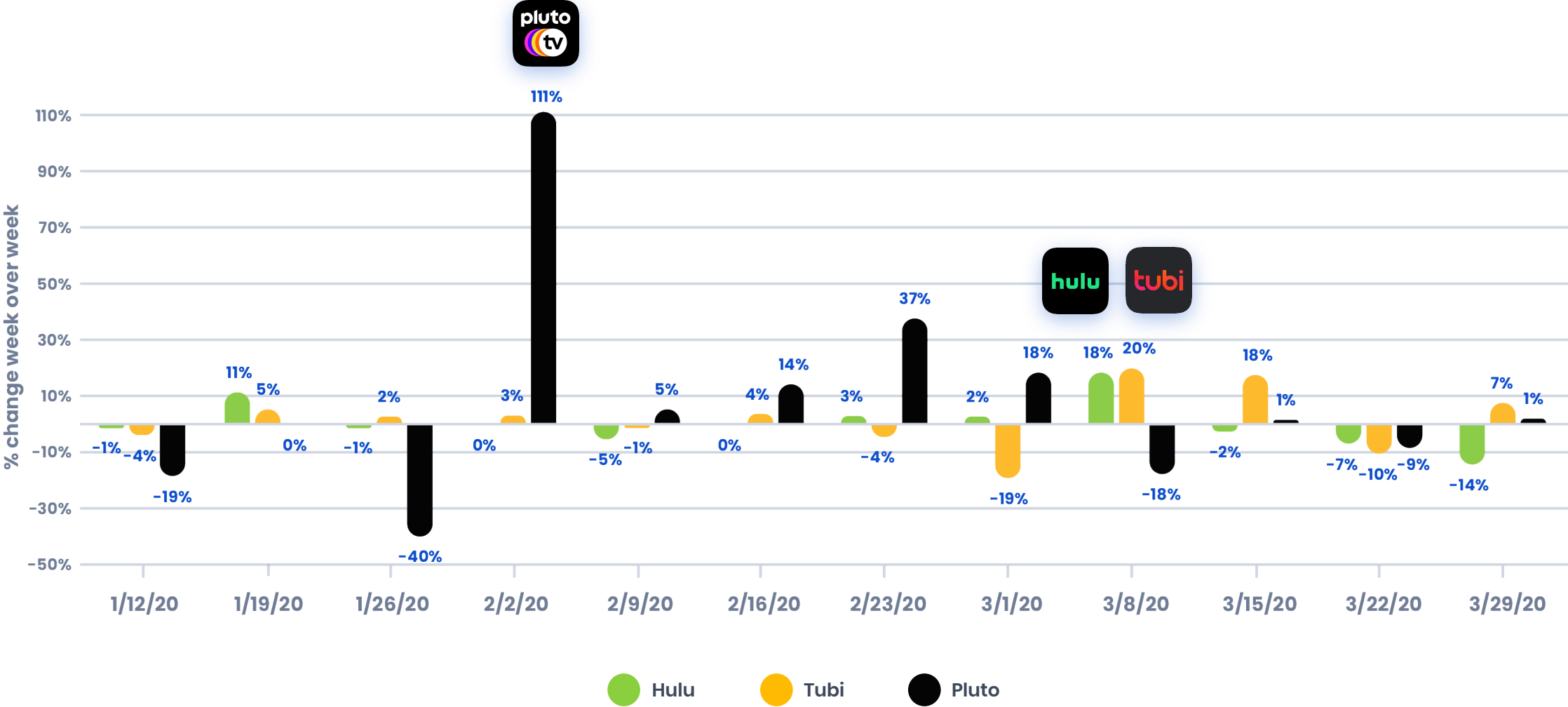
March 1 – June 7, 2020



People Watching More As We're Inside



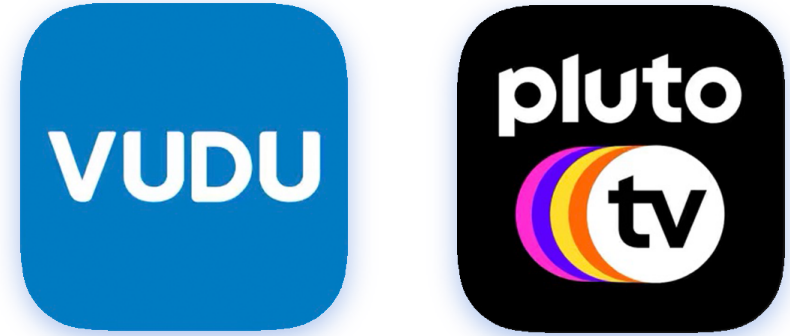
People Watching More As We're Inside



More Competitive Landscape Now



Quibi, HBO Max, Peacock
(plus Disney+ last year)



Consolidation/new ownership
for existing streaming
services like Vudu and Pluto

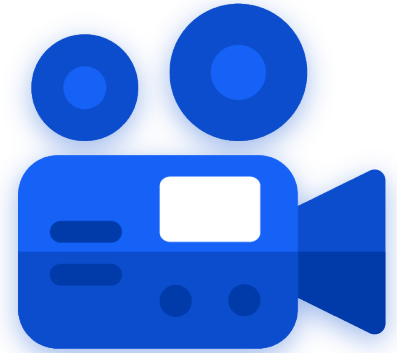
Difficult to Create and Release Content



Limited sports and
live events



Theatrical releases going
straight to streaming



Live shoots are still
out of the picture
right now

What People are Watching



Comforting content:

- Comedies
- Classic favorites



Both TV and streaming are up:

- **25%** in early June said they are watching more live TV, **up from 20% in March.**

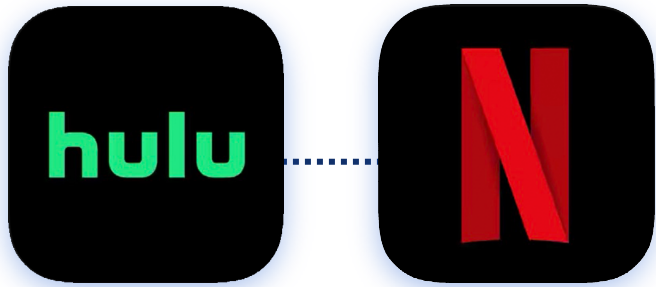


News consumption is starting to plateau/drop off – but recent events **may lead to a new uptick.**

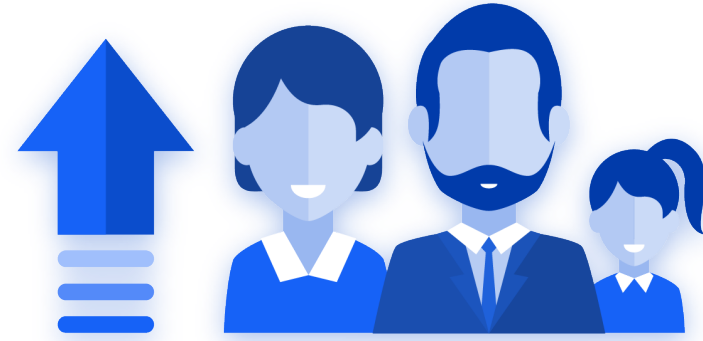
- **19%** in early June said they are using news apps more frequently, **down from 26%**

In March.

What Gets People Watching



Consumers are largely willing to pay for **1-2 streaming services at one time.**

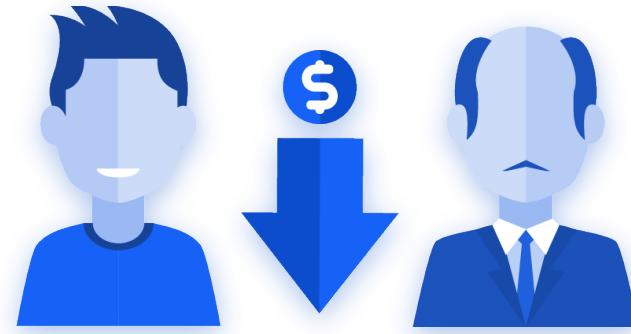


Of consumers age 56-65, **31% are not willing to pay for a streaming service. 28%** of households with kids **will pay for 3-4 services.**

What Gets People Watching



Most types of offers will encourage consumers to try a service, but **specific content followed by a discount offer are the strongest drivers.**



Discounts are an even stronger driver for those 18-25 (**52%**) and 56-65 (**44%**).

How People are Watching Video Content



Mobile video viewing is up 10% YoY since 2018, according to eMarketer. Americans spend close to 2x more time watching video on mobile over desktop/laptop.



Big players like Hulu and Netflix maintain their lead.*



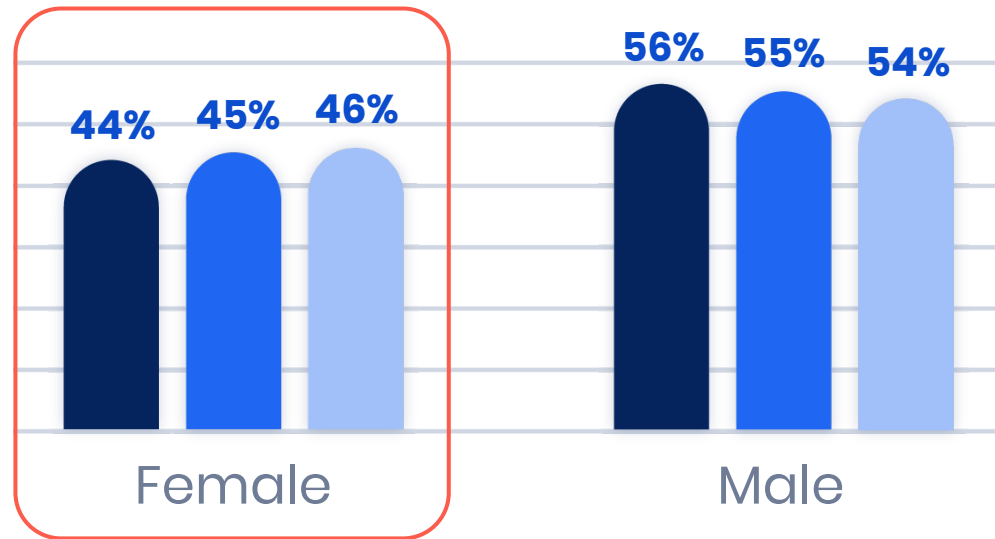
Ad-supported offerings gaining traction with people unwilling or unable to buy content subscriptions right now



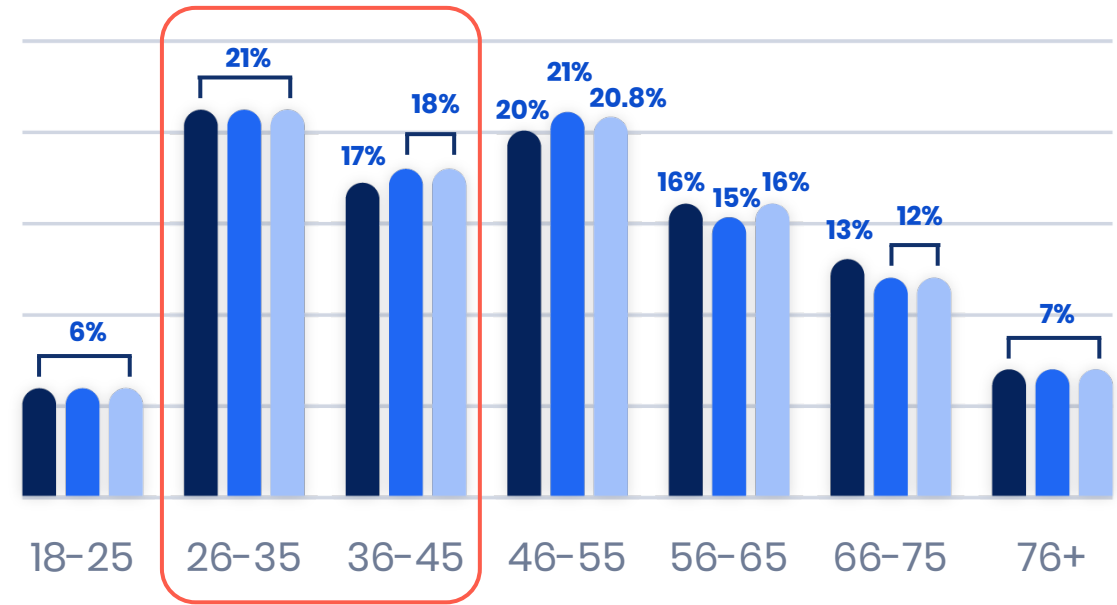
Among close to 900 Americans surveyed by InMobi recently, **68% said they use OTT apps on more than one device.***

Who's Watching Video Content on Apps?

Gender Distribution



Age Distribution



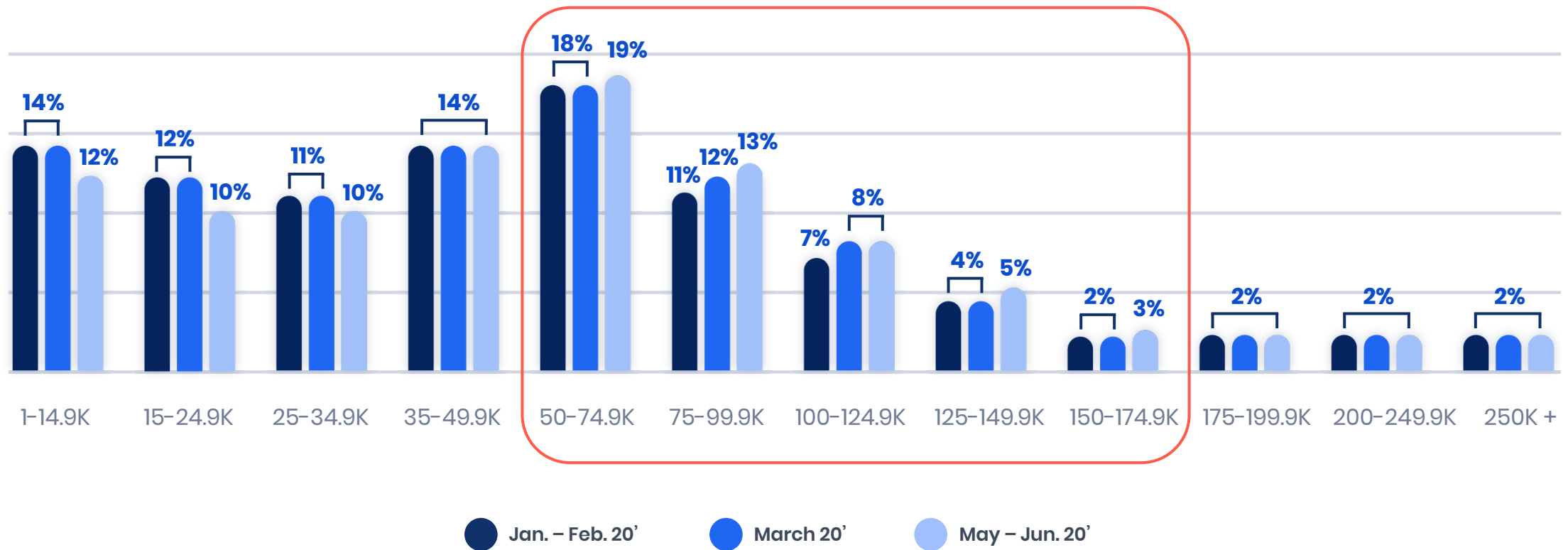
Jan. – Feb. 20'

March 20'

May – Jun. 20'

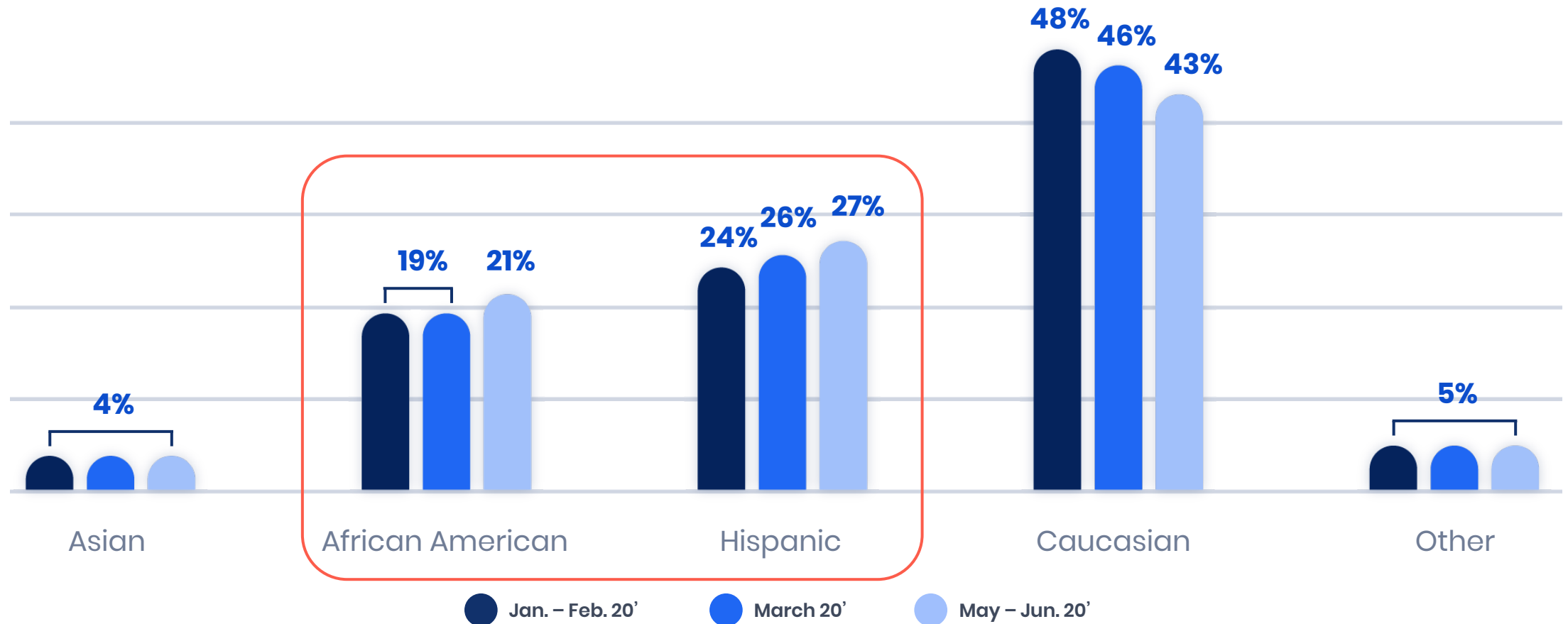
Who's Watching Video Content on Apps?

Household Income Distribution



Who's Watching Video Content on Apps?

Ethnicity Distribution



How People are Watching Video Content

The Rise of Connected TV



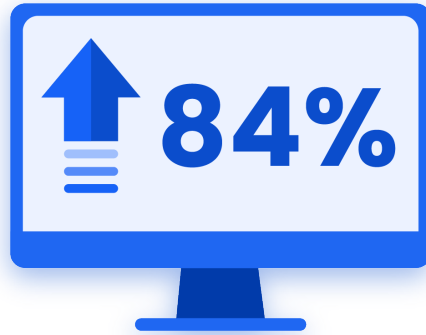
Growing in popularity
of late.



The vast majority of new TV sets
have internet capabilities, but
they're not always utilized.

How People are Watching Video Content

The Rise of Connected TV



84% of Americans who said they have the ability to connect their TV set to the internet **utilize that capability to watch streaming video.**



1-4 Apps

Americans with CTV capabilities typically have **1-4 apps for watching movies and/or TV shows.**



Americans with CTV capabilities **usually spend 2-4 hours a day** watching movies and/or TV shows on these devices.

How to Succeed Today



Use data to better understand, identify and engage your audience.



UA beyond organic: Paid support for incremental acquisition channels can help drive the bottom line.



Retention is key: How do you keep people around, especially if you lured them with a free trial?

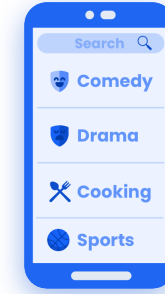


Employ platform-specific ad creatives that will actually resonate with your audiences today.

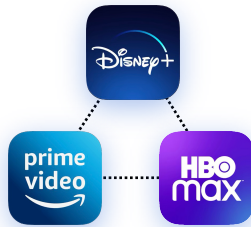
Navigating the Future



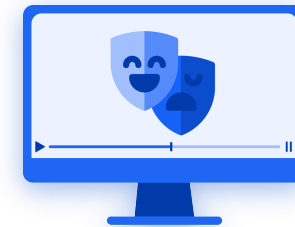
Streaming is the new normal,
and **it was even before COVID.**



**Mobile isn't the second screen
anymore**, as it's how people discover
and watch new content.



We will soon determine the
max number of subscriptions
(or even AVOD apps) people
are willing to consider.



It all revolves around content, but
**users need to know about you and
your content offerings.**

Questions?

For all follow-up queries, email us directly at matt.kaplan@inmobi.com and/or robyn.meyers@inmobi.com

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