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
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**.

Wave 1 (3/19/20 – 3/23/20) n=2,533; Wave 2 (4/2/20 - 4/10/20) n=1,550; Wave 3 (5/7/20 – 5/13/20) n=1,543; Wave 4 (6/11/20 – 6/18/20) n=1,552
Mobile Device App Install Trends
March 1 – June 7, 2020

Amazon Prime Video
Disney+
Hulu
Pluto
Quibi
Netflix
Tubi
HBO
People Watching More As We’re Inside

Amazon Prime Video
Disney+
Netflix

% change week over week

1/12/20: -12%
1/19/20: 5%
1/26/20: 8%
2/2/20: 21%
2/9/20: 0%
2/16/20: 16%
2/23/20: 16%
3/1/20: 8%
3/8/20: 12%
3/15/20: 46%
3/22/20: 3%
3/29/20: 1%
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.

Wave 1 (3/9/20 – 3/23/20) n=2,533; Wave 2 (4/2/20 – 4/10/20) n=1,550; Wave 3 (5/7/20 – 5/13/20) n=1,543; Wave 4 (6/11/20 – 6/18/20) n=1,552
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.

Surveyed 6/11–6/16/20: Streaming apps willing to pay for n=1,545; Drivers for paying for streaming service n=905
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%).

Surveyed 6/11/20–6/16/20; Streaming apps willing to pay for n=1,545; Drivers for paying for streaming service n=905.
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.*

*Surveyed 4/27/20 – 5/8/20; n=899
Who’s Watching Video Content on Apps?

Gender Distribution

- Female: 44%, 45%, 46%
- Male: 56%, 55%, 54%

Age Distribution

- 18-25: 6%
- 26-35: 21%
- 36-45: 17%
- 46-55: 18%
- 56-65: 20%
- 66-75: 21%
- 76+: 20.8%

Source: InMobi telco data + Experian-verified demographics
Who’s Watching Video Content on Apps?

Household Income Distribution

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Jan. – Feb. 20’</th>
<th>March 20’</th>
<th>May – Jun. 20’</th>
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<tbody>
<tr>
<td>1-14.9K</td>
<td>14%</td>
<td>12%</td>
<td>11%</td>
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<tr>
<td>15-24.9K</td>
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<td>25-34.9K</td>
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<td>250K +</td>
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Source: InMobi telco data + Experian-verified demographics
Who’s Watching Video Content on Apps?

Ethnicity Distribution

- **Asian**: 4%
- **African American**: 19% (Jan. – Feb. 20')
- **Hispanic**: 21% to 24% (Jan. – Feb. 20', March 20', May – Jun. 20')
- **Caucasian**: 48% to 43% (Jan. – Feb. 20', March 20', May – Jun. 20')
- **Other**: 5%

Source: InMobi telco data + Experian-verified demographics
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.

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.

Surveyed 4/27/20 – 5/8/20; n=381-1,044
How to Succeed Today

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

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

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

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