

# 99 STREAMERS BUT MY SHOWS NOT ON?

The challenge of discovery  
for today's viewers

**NOV**  
**2021**



**The Media Insights  
& Engagement Conference**

- 1. What's the TV experience like in 2021?**
- 2. What's the impact on TV discovery?**
- 3. What will impact which shows are discovered in the future?**





**What's the TV  
experience  
like in 2021?**





# THERE'S MORE COMPETITION FOR TIME THAN EVER

An existing trend  
that's been  
accelerated by  
COVID

Avg. number of TV sources per viewer

**2021** **5.7**

**2020** **4.8**

**2019** **3.7**

**2018** **3.0**

Note: calculation includes MVPD, VMVPD, SVOD, DTC, AVOD, OTA and transactional

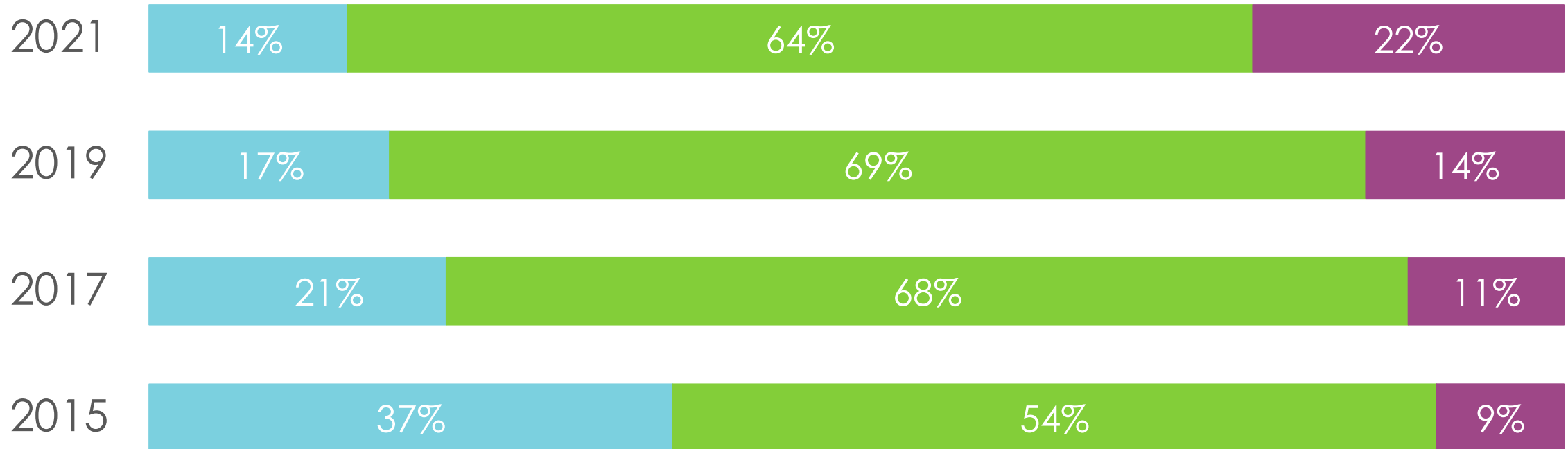




# MOST USE BOTH PAY TV AND STREAMING

Which TV services do you subscribe to?

■ Traditional only   ■ Traditional and Streaming   ■ Streaming Only



Base: Total respondents - 2021 (n=1,600), 2020 (n=1,600), 2019 (n=1,678), 2018 (n=1,933), 2017 (n=1,806), 2016 (n=1,217), 2015 (n=1,200)

Q2a. Do you currently have any of the following television services in your home?

Q3a. Do you have any of these online streaming subscriptions, where you pay a monthly or annual fee for access to shows and movies online?

**Traditional:** MVPD or over-the-air

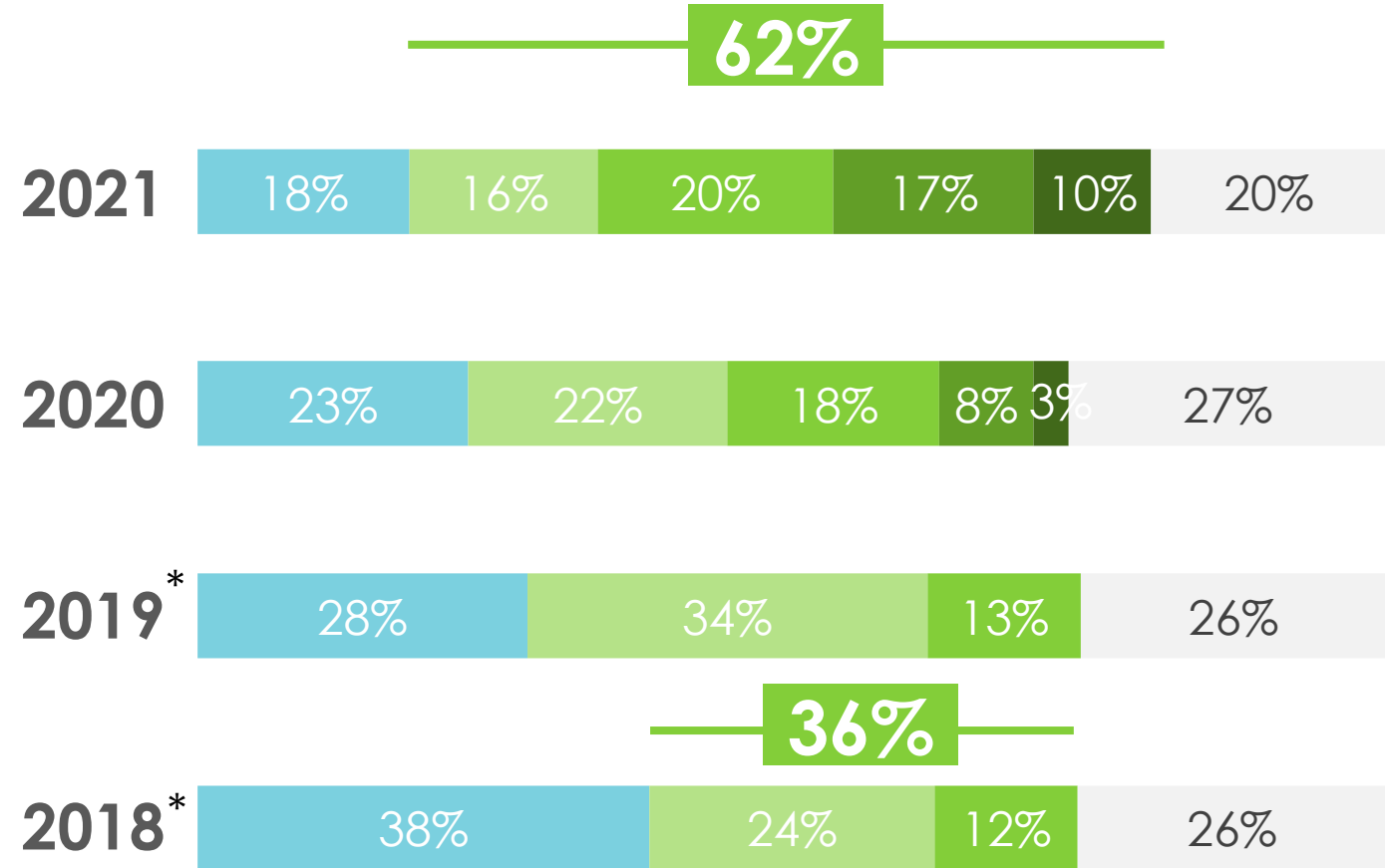
**Streaming:** SVOD, AVOD, direct-to-consumer, virtual MVPD, transactional



# SVOD STACKING DEFINES THE NEW TV ECOSYSTEM

More than a quarter use 4+ of the “Big 5”:  
Netflix, HBO Max,  
Hulu, Amazon, and  
Disney +

How many of the “Big 5” SVODS do you subscribe to?



■ Only one ■ Two ■ Three ■ Four ■ All Five ■ None

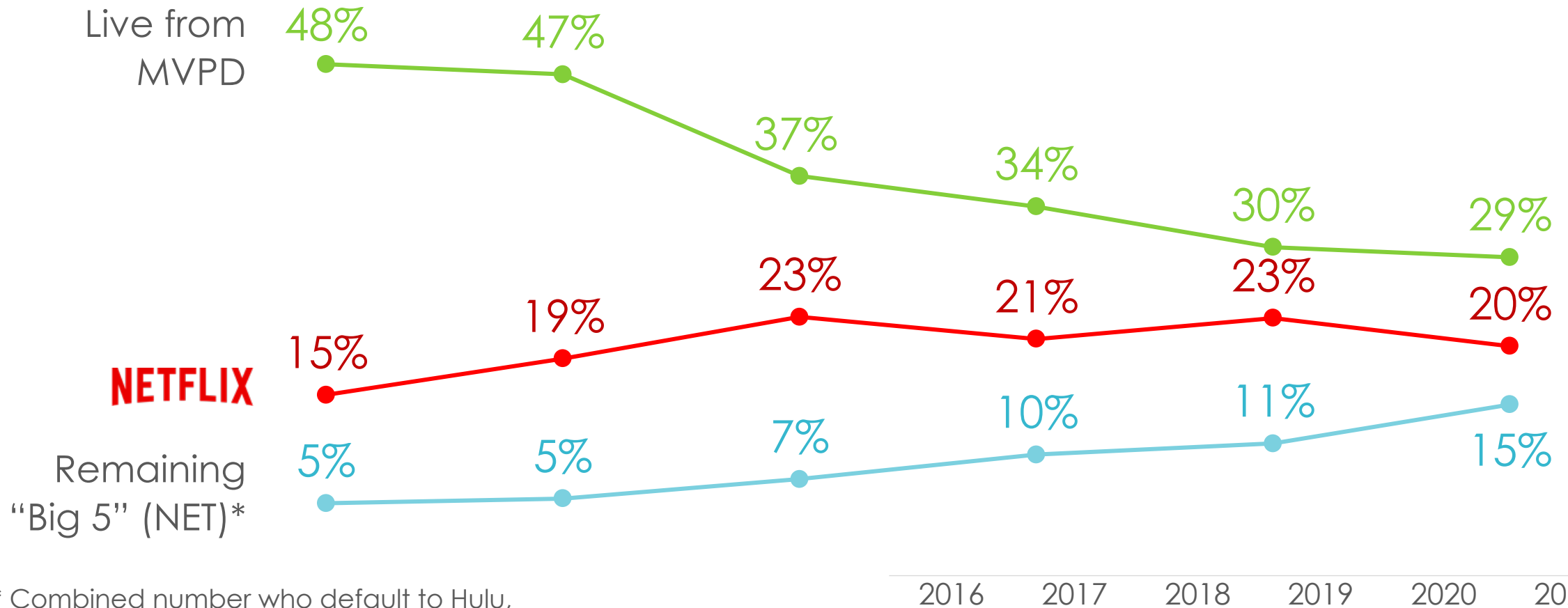
\*only three of big 5 available prior to 2020



# OTHER BIG STREAMERS ARE CUTTING INTO NETFLIX'S LEAD AS A "HOME BASE" FOR TV



What's your default source for TV?  
*"The first thing you turn on when you want to watch"*



\* Combined number who default to Hulu, Amazon, Disney +, and HBO Max

A horizontal, light gray search bar with a thin blue border, positioned to the right of the search button.

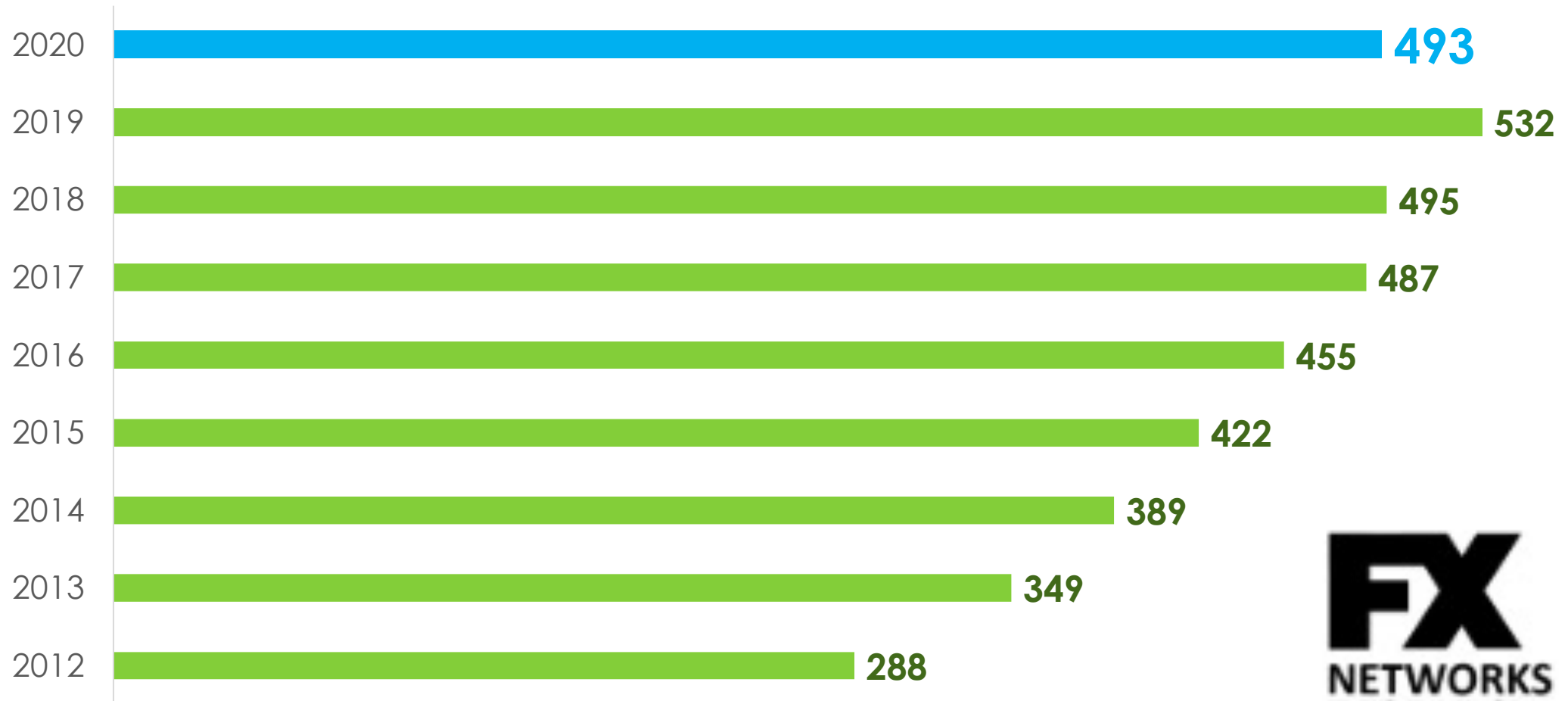
**How does this  
change TV  
discovery?**



# THE PANDEMIC STOPPED PRODUCTION – BUT THERE ARE STILL A LOT OF SHOWS



## Number of Scripted TV Shows By Year, Across Sources

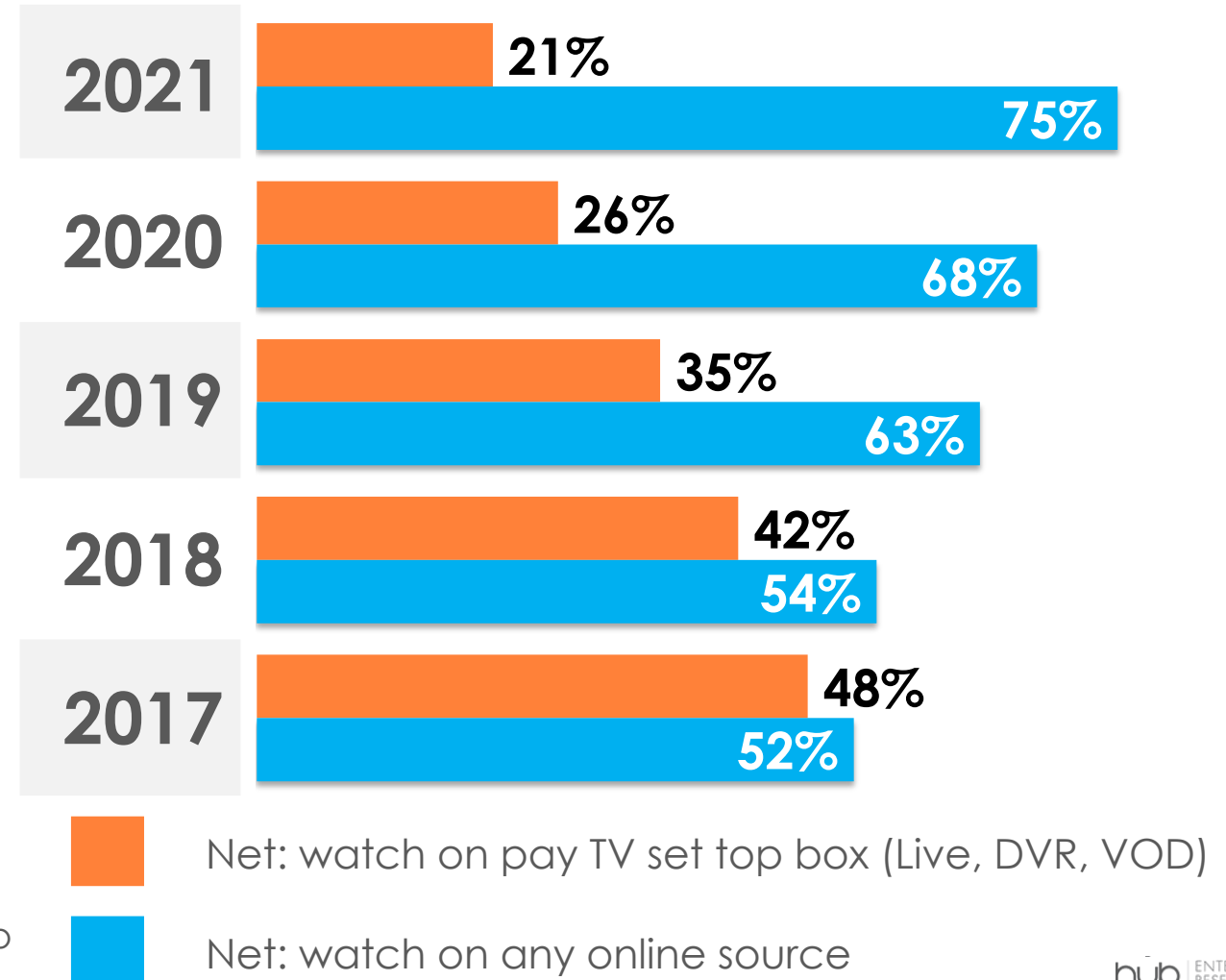


# STREAMERS' INVESTMENT IN CONTENT IS REFLECTED IN WHERE VIEWERS DO THEIR LEAN-IN VIEWING



When asked about a favorite show they've discovered in the past year, 3x as many watch online as on a set-top-box.

How do you watch your favorite show?



\*Note: percentages from 2018 on do not include those who watched via OTA

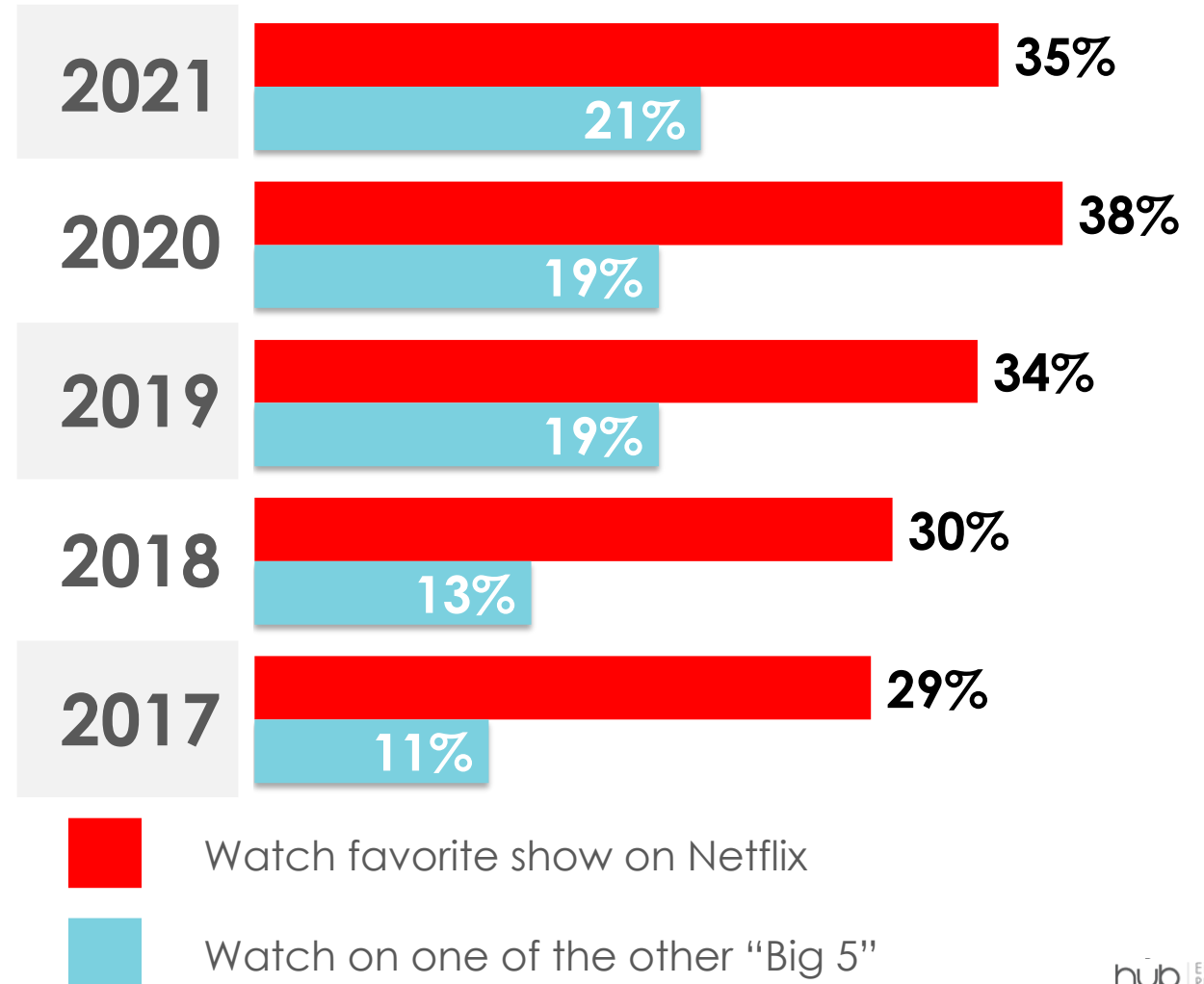


# FEWER SAID THEIR NEW FAVORITE SHOW WAS ON NETFLIX— THE FIRST DECREASE EVER



There's still no single platform that challenges Netflix. But other streamers are cutting its lead.

How do you watch your favorite show?

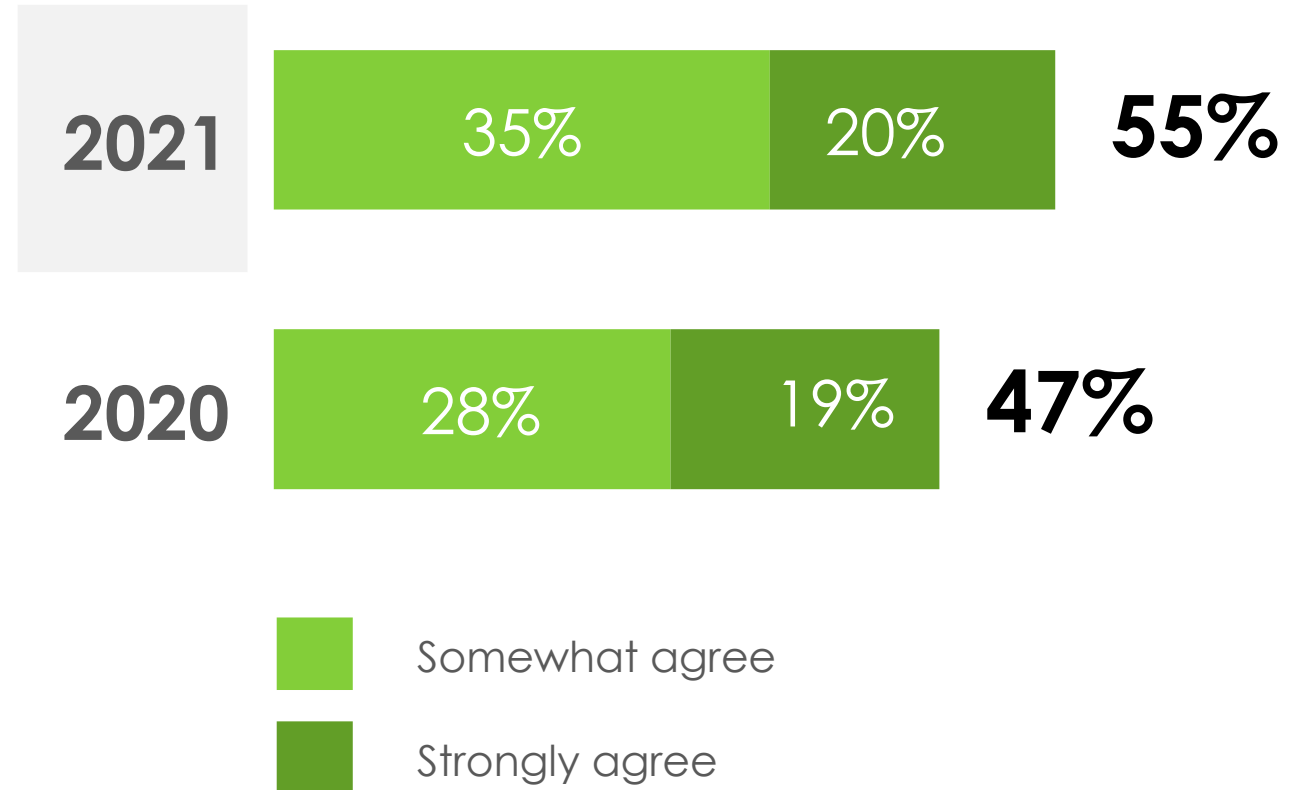


# ALL THE INVESTMENT IN CONTENT MAKES TV MORE COMPELLING FOR VIEWERS



“There are more good TV shows to choose from today than in the past”

Most people say there are more good shows to choose from today than in the past

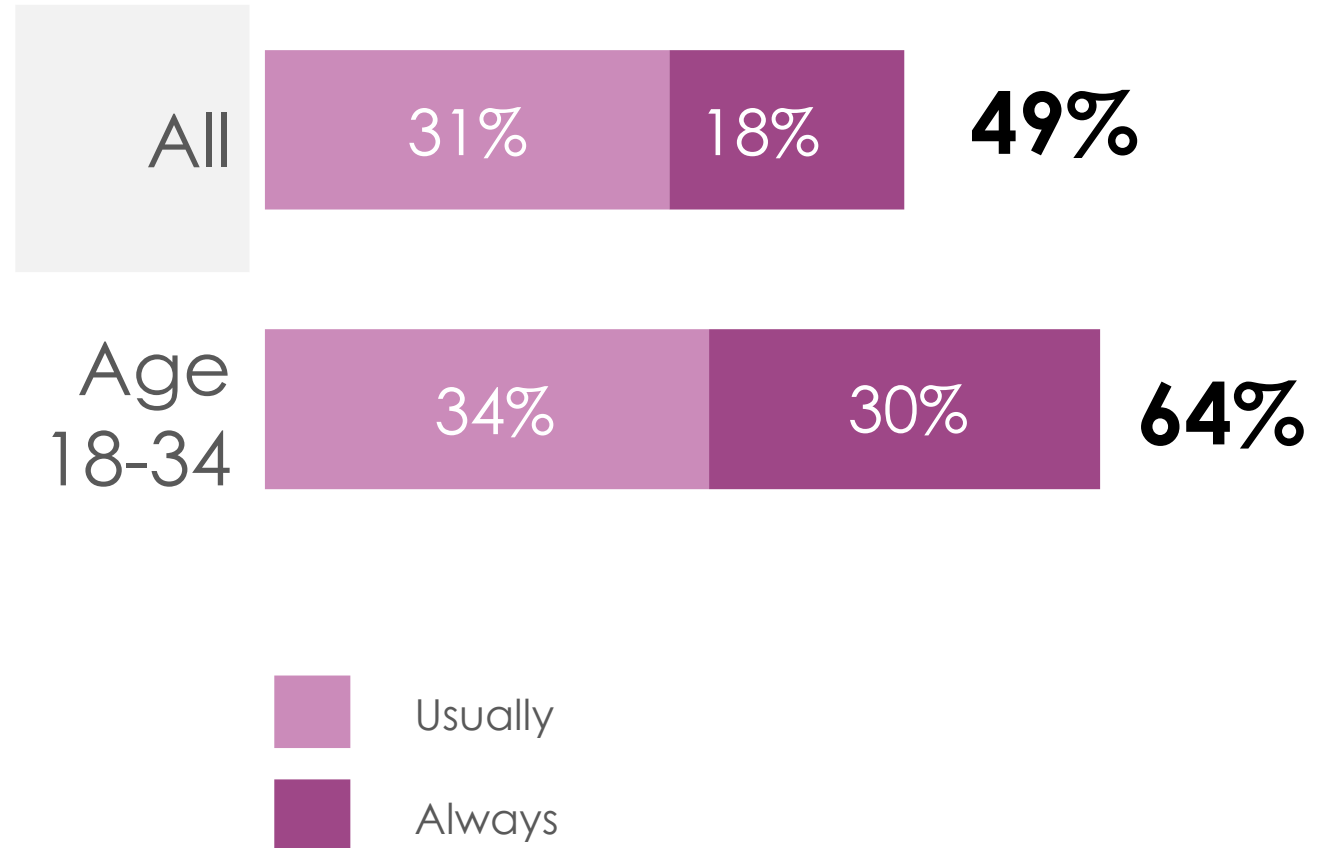




## BUT REQUIRES MORE DUE DILIGENCE

Trailers are an important tool (especially for younger viewers) to decide which shows are worth their time

How often do you watch a trailer before deciding to try a show for the first time?

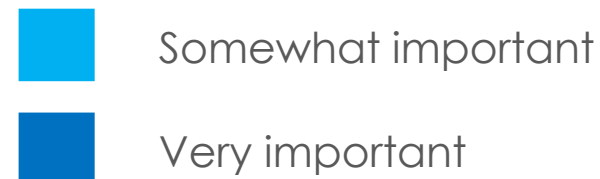




## AND A SIMPLER WAY TO USE ALL THAT CONTENT

The great majority say that being able to search across all providers is important in order to have a good viewing experience

How important is the ability to search for shows across all providers?

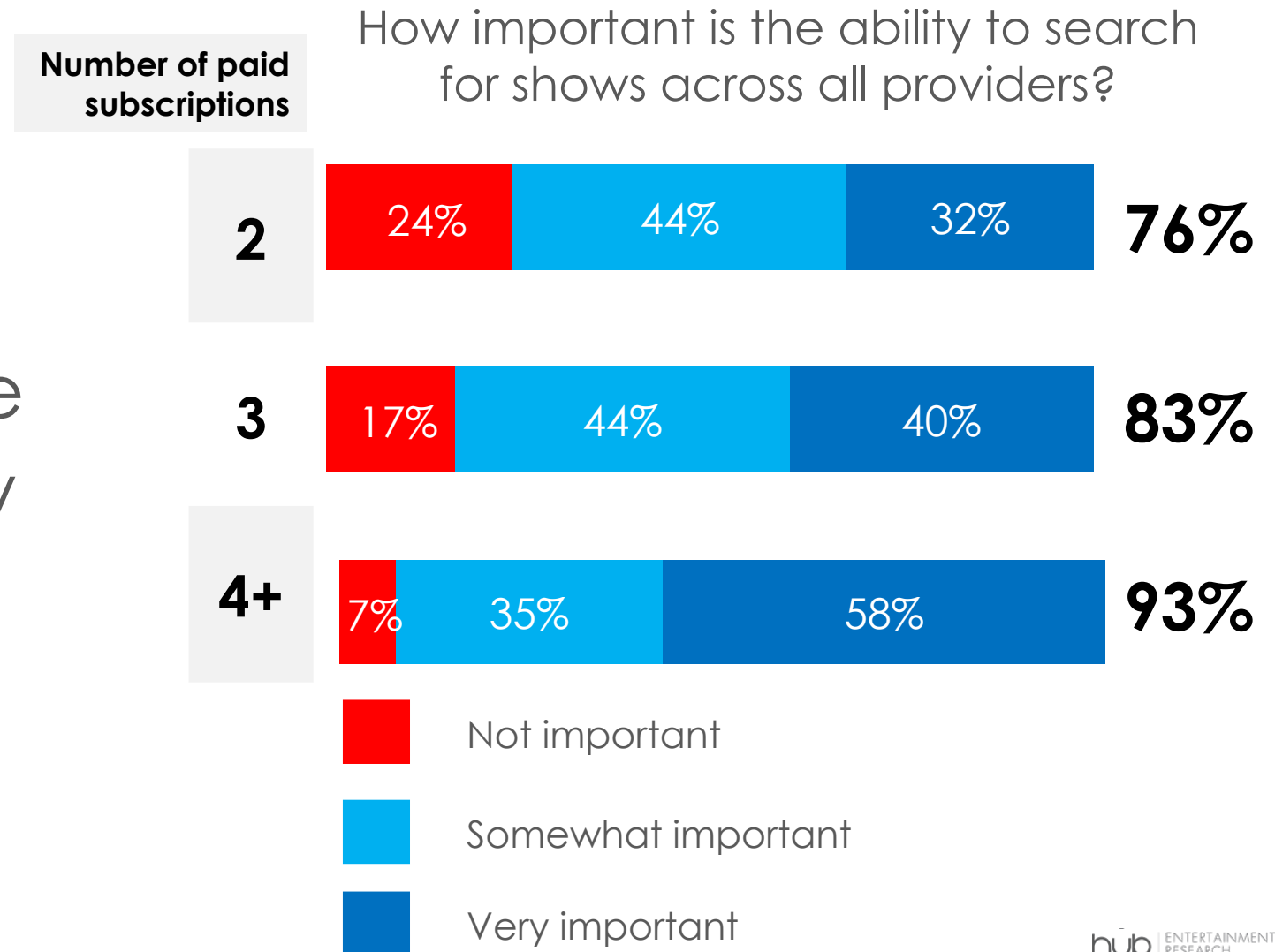




# AGGREGATION IS AMONG THE BIGGEST NEEDS CREATED BY PEAK TV



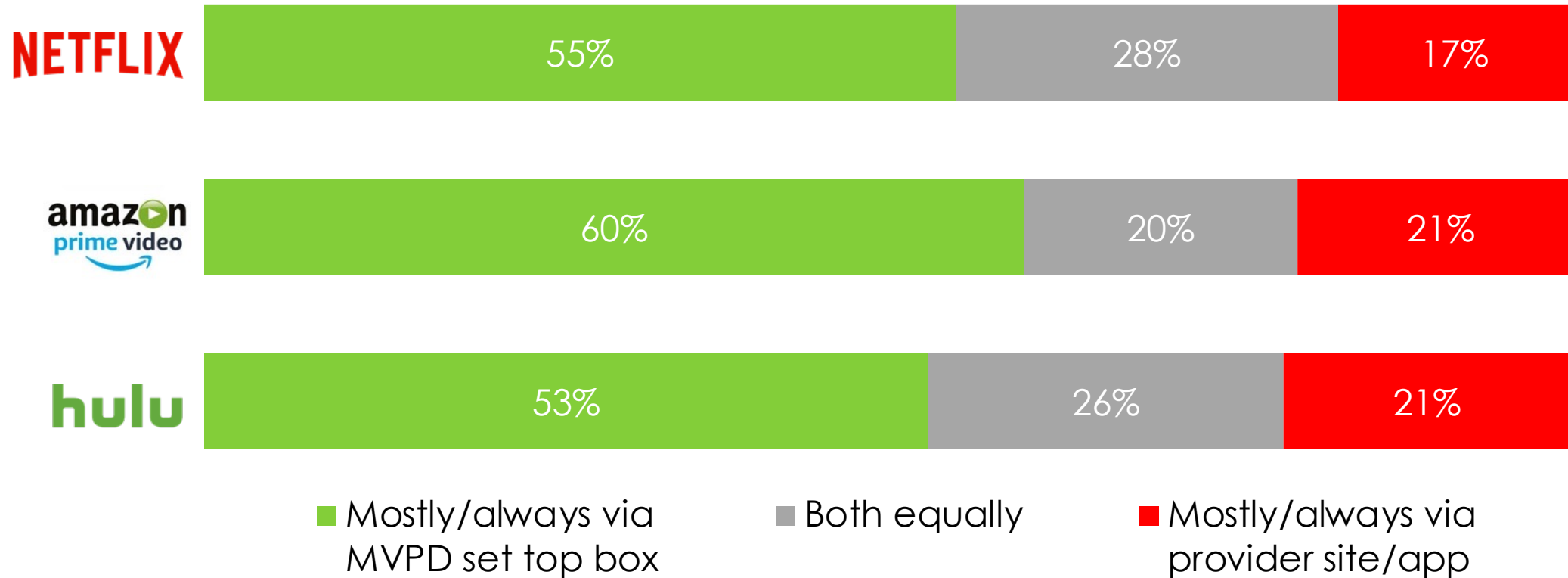
Among those with 4+ paid subscriptions, more than ninety percent say universal search is important





# IT'S A NEED BIG ENOUGH TO CHANGE HABITS

How do you usually watch [Netflix/Amazon/Hulu]?  
- Among those who stream on MVPD provider's set top box -



BASE: STREAM SHOWS ON MVPD SET TOP BOX – NETFLIX (n=339), AMAZON (n=200), HULU (n=106)  
Q8h. When you watch [SERVICE], do you...?

**What will impact discovery in  
the future?**

# 1. Smart TVs

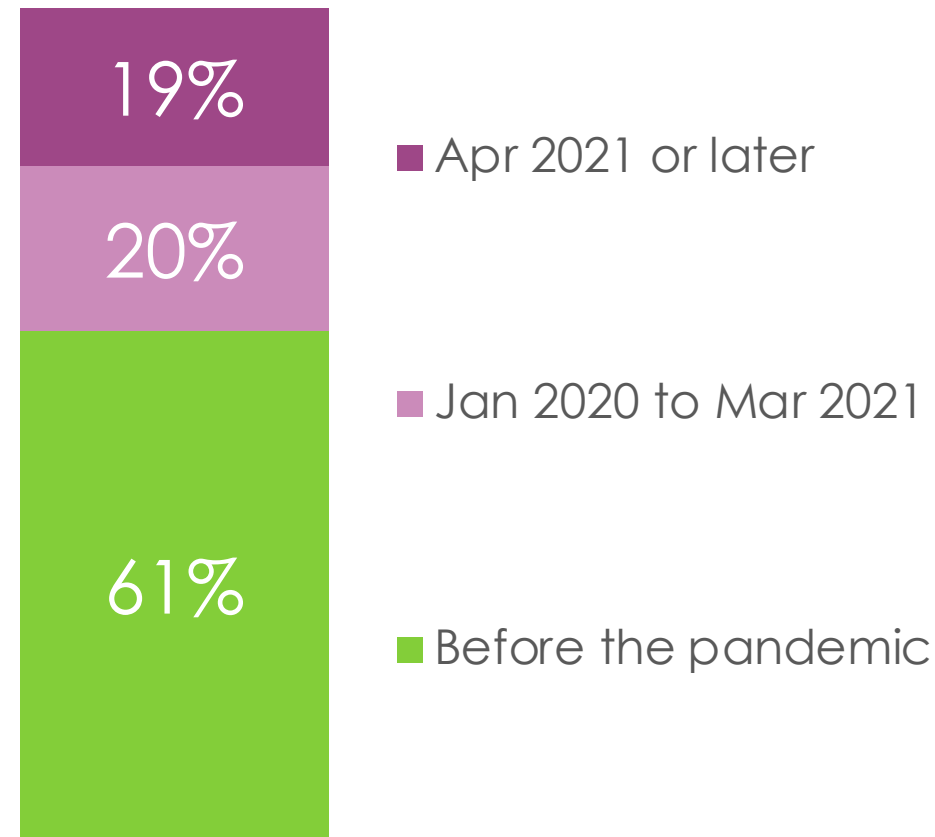




# VIEWERS BOUGHT MILLIONS OF SMART TVS DURING THE PANDEMIC



When did you last buy a smart TV?  
*Among those who watch on smart TV*

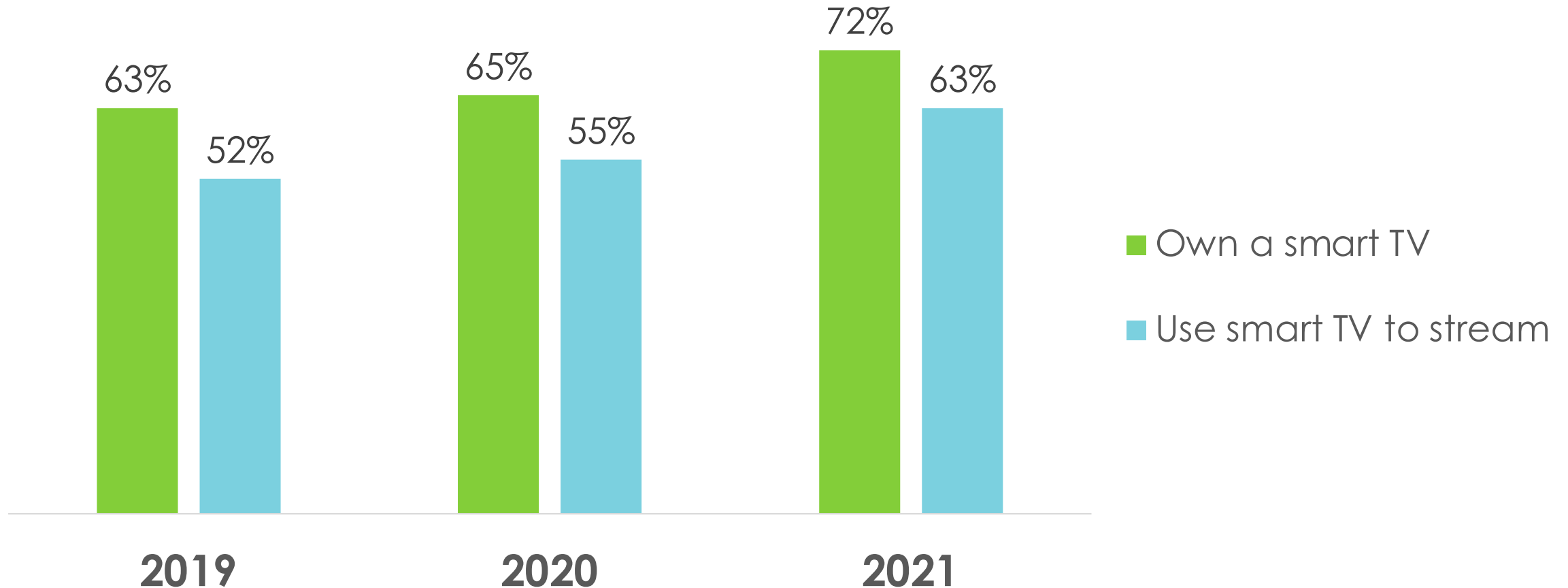


BASE: WATCH ON SMART TV JUN 2021 (n=1,535)  
Q5m. When did you buy your Smart TV? If you have more than one Smart TV, when did you buy your most recent Smart TV set?

# THERE ARE MORE SMART TVS, AND THEIR SMART CAPABILITIES ARE USED MORE WIDELY



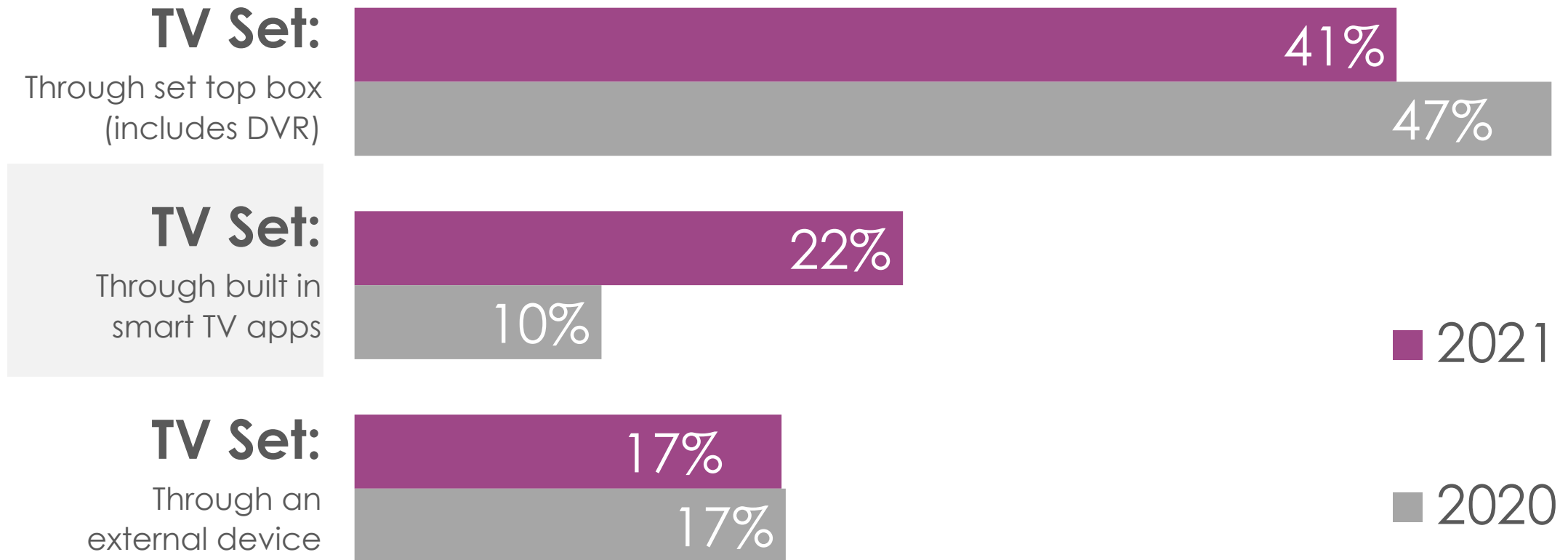
% of TV households that...





# ALMOST A QUARTER SAY THAT INTERNAL SMART TV APPS ARE THEIR TV “HOME BASE” – DOUBLE THE NUMBER IN 2020

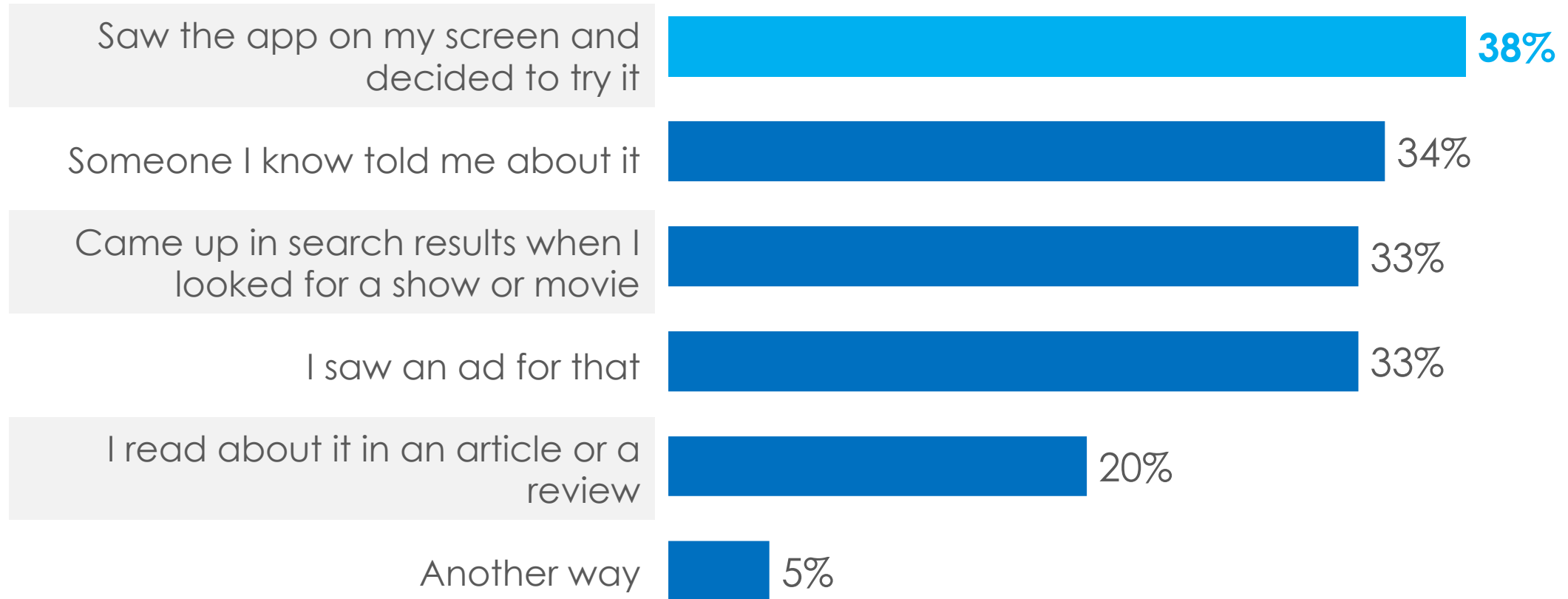
What's your default \*device\* for TV viewing?  
*The first thing you turn on when you want to watch*



# THE SMART TV HOME SCREEN DRIVES PLATFORM DISCOVERY



How did you first find out about that provider?







## 2. Lean-back viewing

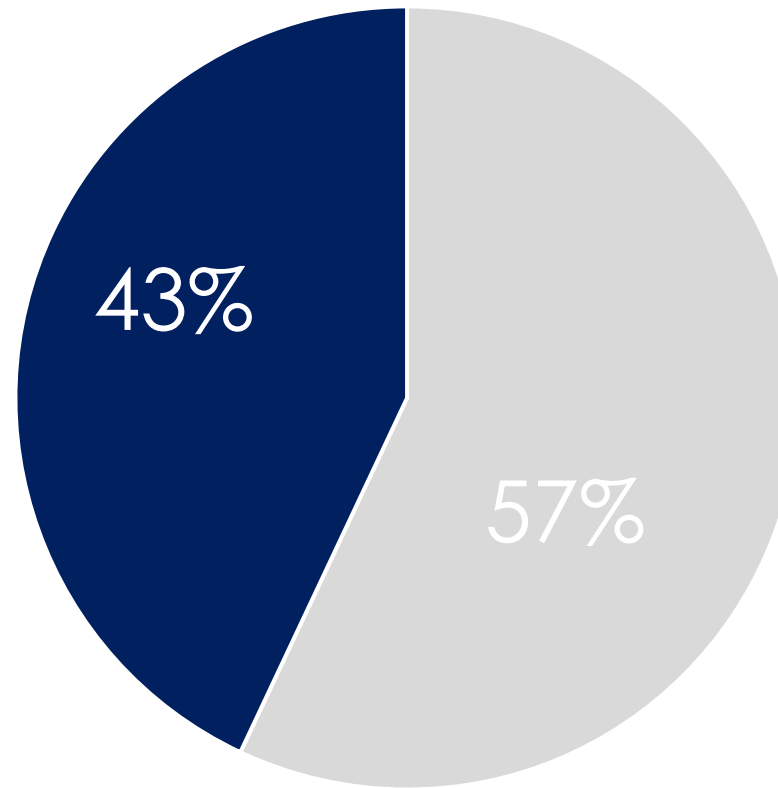


# LEAN BACK VIEWING HAS ALWAYS EXISTED

When you're ready to watch, what percent of the time do you

- Mean % -

Don't have anything  
specific in mind



Sit down with  
something specific  
already in mind

BASE: TOTAL RESPONDENTS (n=1,604)

Q6e2new. We have some questions about the way you find TV shows and movies to watch. We'd like you to think of typical situations when you're ready to watch TV. In those situations, about what percent of the time ...

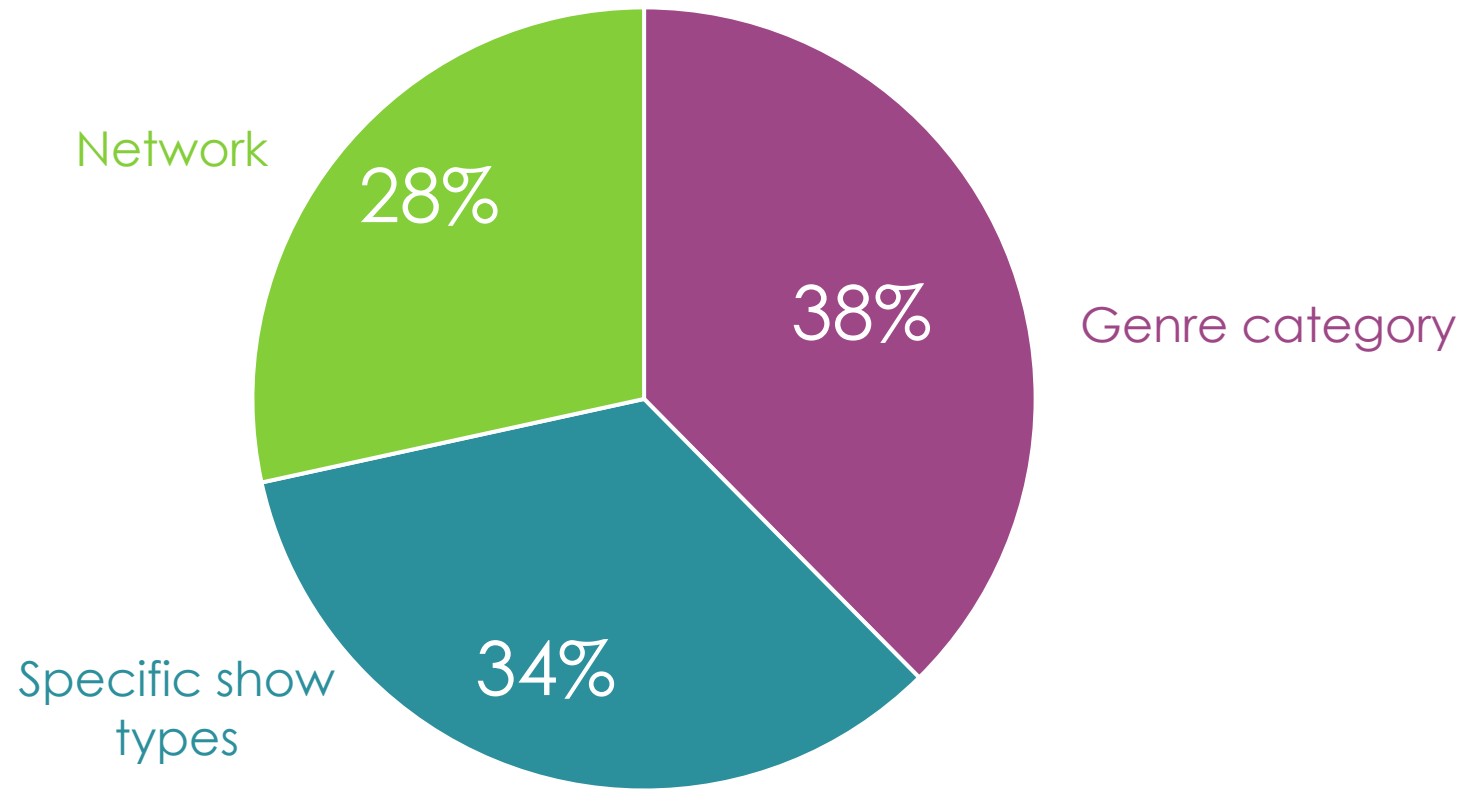
↑ = significantly higher than those not in subgroup

hub | ENTERTAINMENT  
RESEARCH



# MORE PEOPLE WHO ARE BROWSING PREFER TO SEARCH BY GENRE OR SHOW TYPE THAN BY NETWORK

Which way do you FIRST prefer to find something to watch?

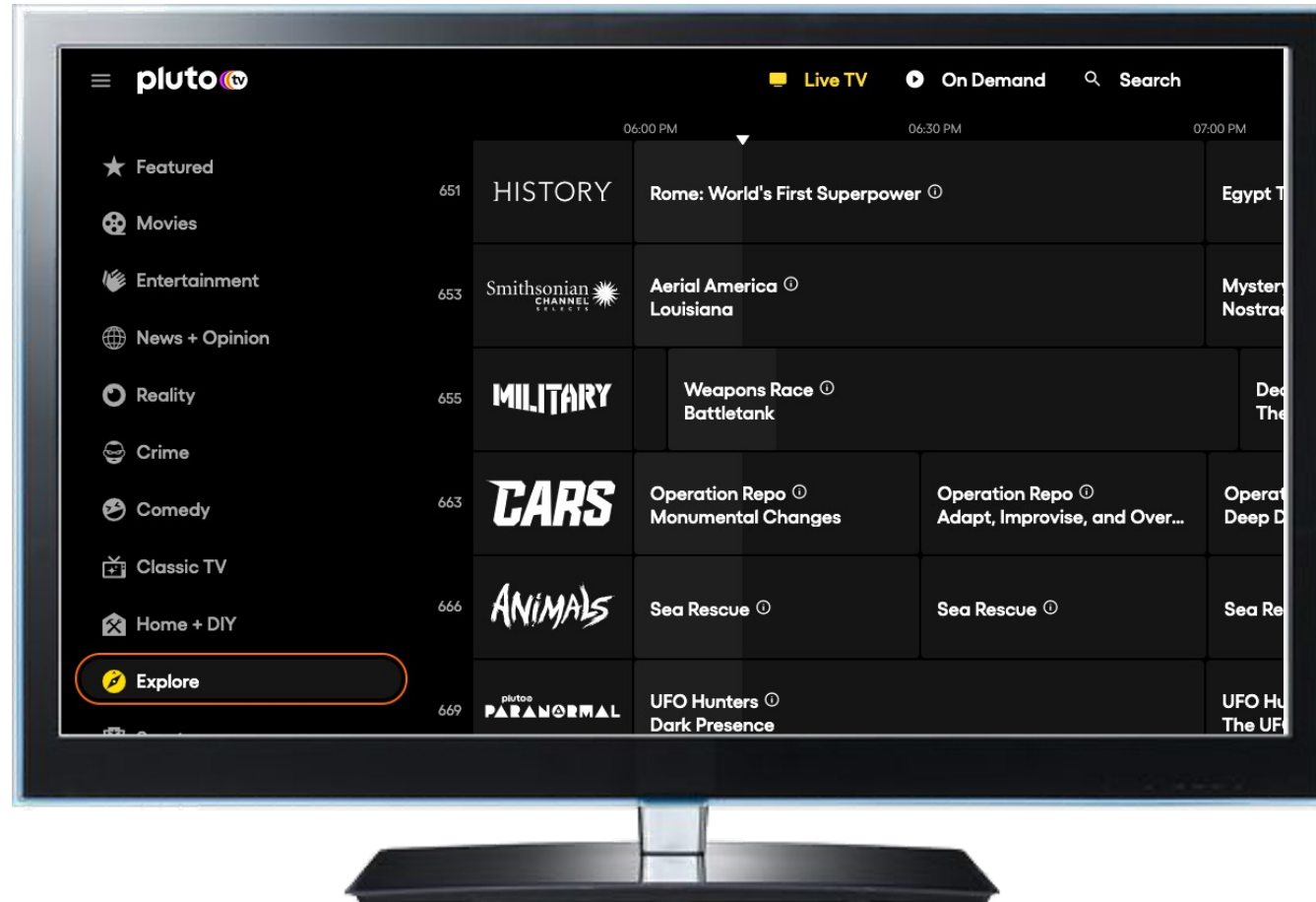


BASE: TOTAL RESPONDENTS (n=1,604)

Q6f1. Here are different ways TV shows and movies could be organized to help people find something to watch when they have nothing specific in mind. Rank these ways based on your preference—from the way you'd prefer most to the way you'd prefer least.



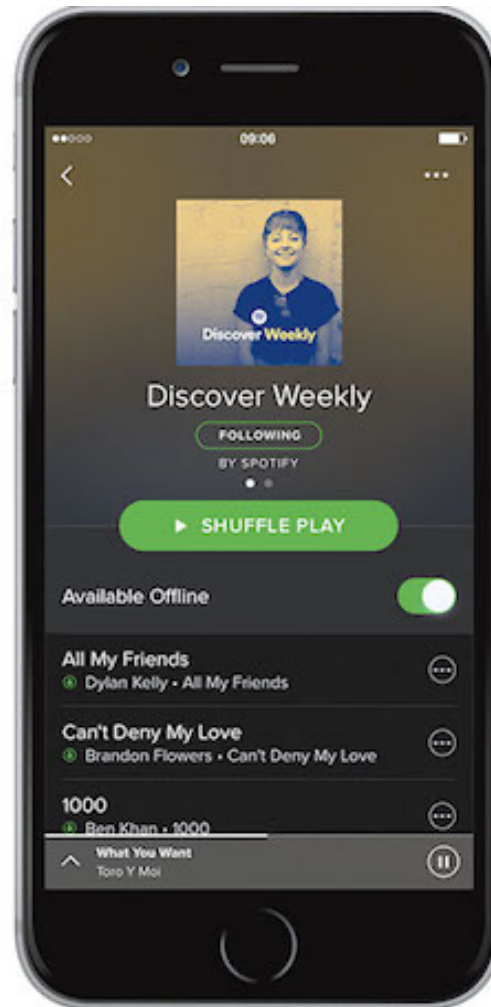
# FASTS LET DISCOVERY WORK JUST THIS WAY



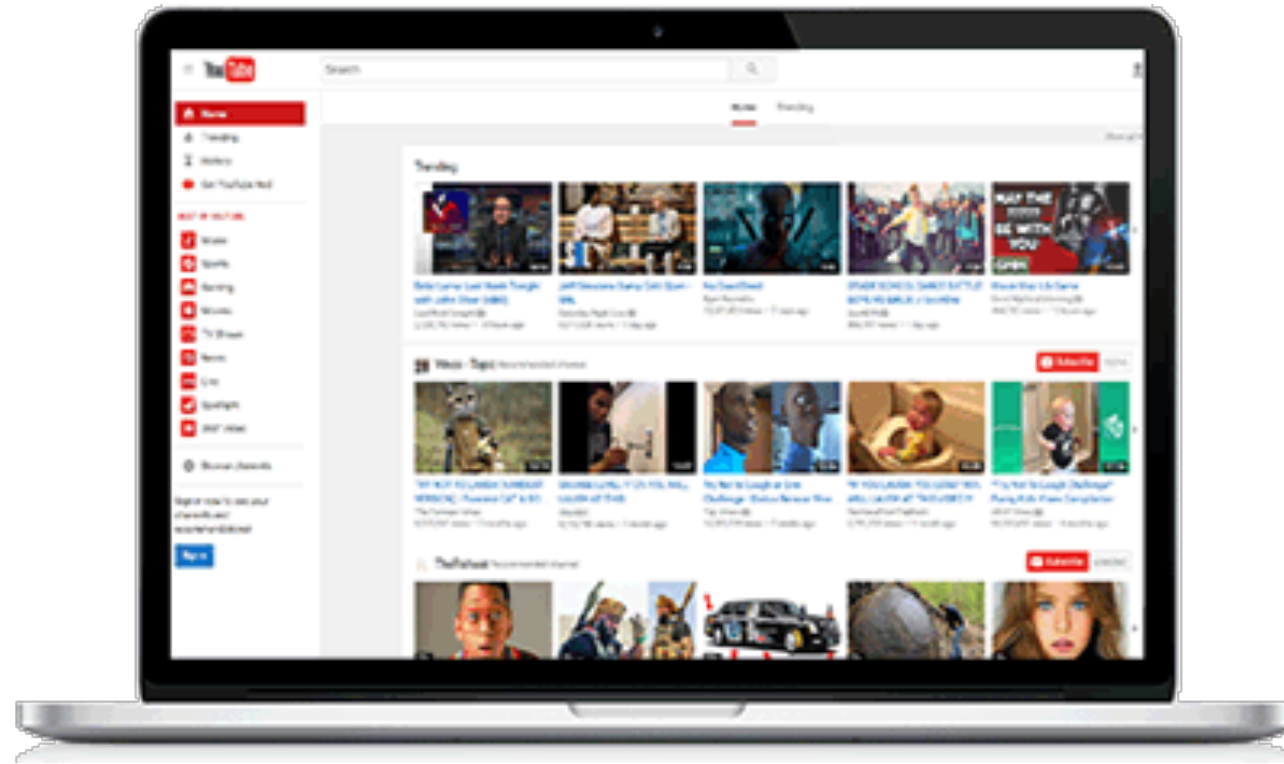


# THIS IS A DISCOVERY METHOD VIEWERS ARE FAMILIAR WITH

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# THIS IS A DISCOVERY METHOD VIEWERS ARE FAMILIAR WITH





**In the Netflix era,  
will people still  
watch TV with ads?**

**In the Netflix era,  
will people still  
watch TV with ads?**

The Pluto TV logo is centered on the right side of the slide. It features the word "pluto" in a lowercase, white, sans-serif font, followed by a circular icon containing the letters "tv" in white. The background of the slide is a vibrant, abstract pattern of colorful lines and dots in shades of purple, blue, yellow, and orange, radiating from the center. A small white gear-like icon is visible in the top right corner.

**pluto tv**

**DEADLINE**

**Pluto TV Reaches \$1 Billion Annual Revenue  
Milestone A Year Ahead Of Schedule**

# FOR MANY VIEWERS, ADS ARE AN ACCEPTABLE TRADEOFF FOR SAVING MONEY



Which statement comes closest to how you feel about ads?

Among all



■ | **I'd rather save money:**

If watching ads will cost \$4-\$5 less than watching ad-free, I'll choose that option

■ | **I'd rather avoid ads:**

If there is an ad-free option, I'll choose it even if it costs \$4-\$5 more per month



# ...INCLUDING MANY WHO RANK THEMSELVES AMONG THE MOST AD-INTOLERANT



Which statement comes closest to how you feel about ads?

Among all



Among most "ad-intolerant"



■ | **I'd rather save money:**

If watching ads will cost \$4-\$5 less than watching ad-free, I'll choose that option

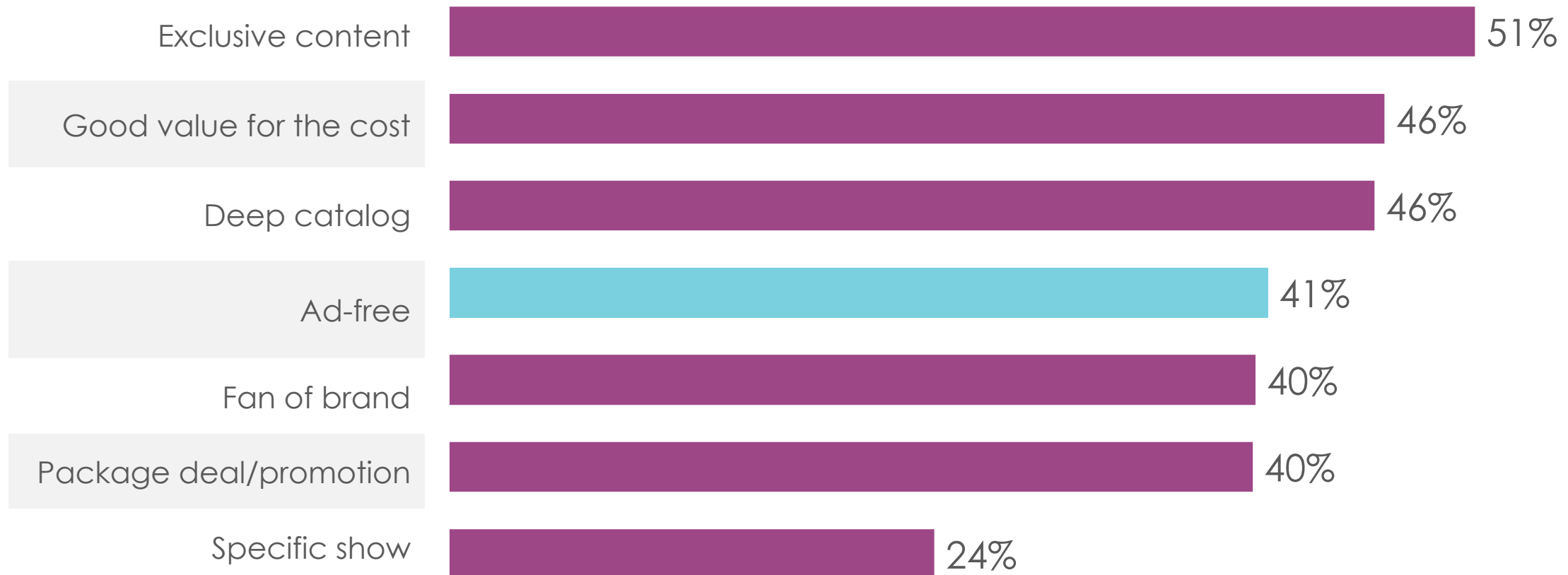
■ | **I'd rather avoid ads:**

If there is an ad-free option, I'll choose it even if it costs \$4-\$5 more per month

# PEOPLE DON'T SIGN UP FOR AD-FREE PLATFORMS TO AVOID ADS - THEY SIGN UP FOR CONTENT



What were the main reasons you signed up?  
Among those who subscribed to a new ad-free service in past 6 mos





A reason to watch  
FASTs besides the fact  
that they're free





# 3. Unique content

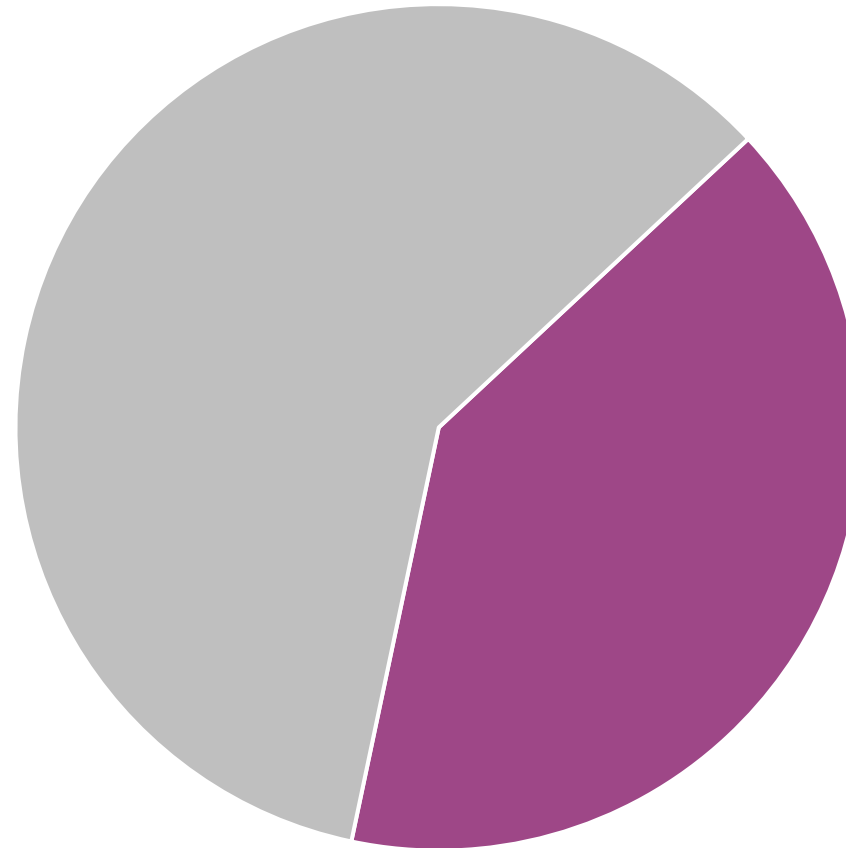






# A FULL 4 IN 10 TV CONSUMERS SAY THEY'VE SIGNED UP FOR A STREAMING SERVICE JUST TO WATCH ONE "EXCLUSIVE" SHOW

Have you ever signed up for a **streaming service** just to watch one show not available elsewhere?



**40%**  
YES,  
have added a  
**service** to  
watch one  
specific show



# WITH ORIGINALS & EXCLUSIVES UBIQUITOUS, THE PROPORTION SIGNING UP FOR JUST ONE SHOW IS UP 6 POINTS FROM 2020



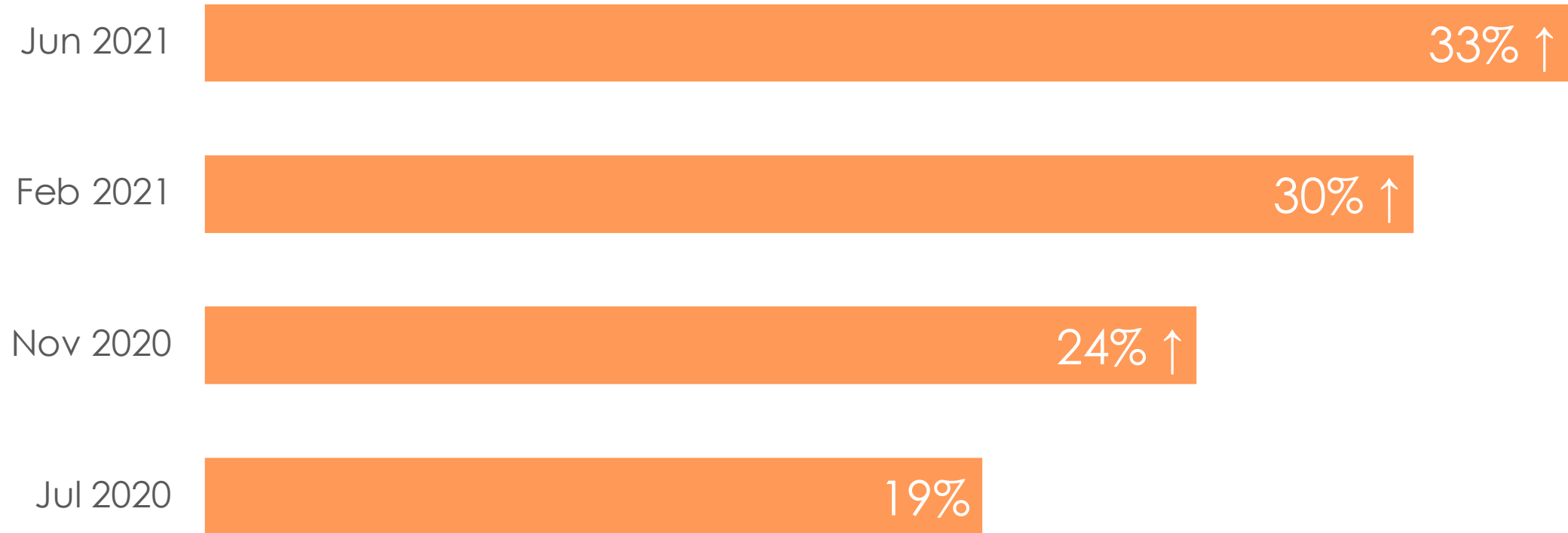
Have you ever signed up for a **streaming service** just to watch one show not available elsewhere?



# THE PANDEMIC MADE WATCHING SAME DAY AS THEATER MOVIES A MORE MAINSTREAM ACTIVITY



Have you paid to stream any new movies that skipped the theater because of COVID?

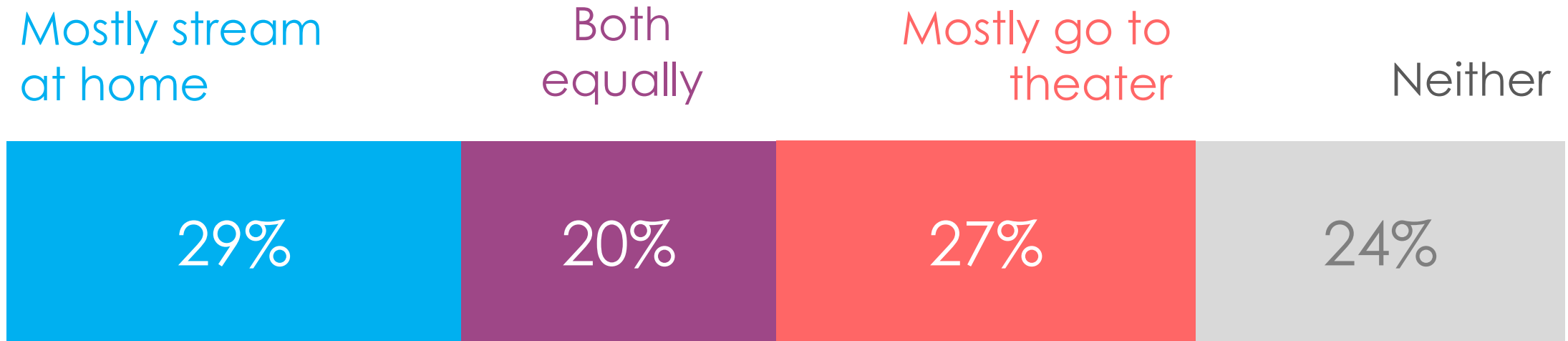


↑↓ Significantly greater/less than prior wave

# ...AND A HABIT THAT WILL STICK



How do you expect to watch first-run movies in the next year?

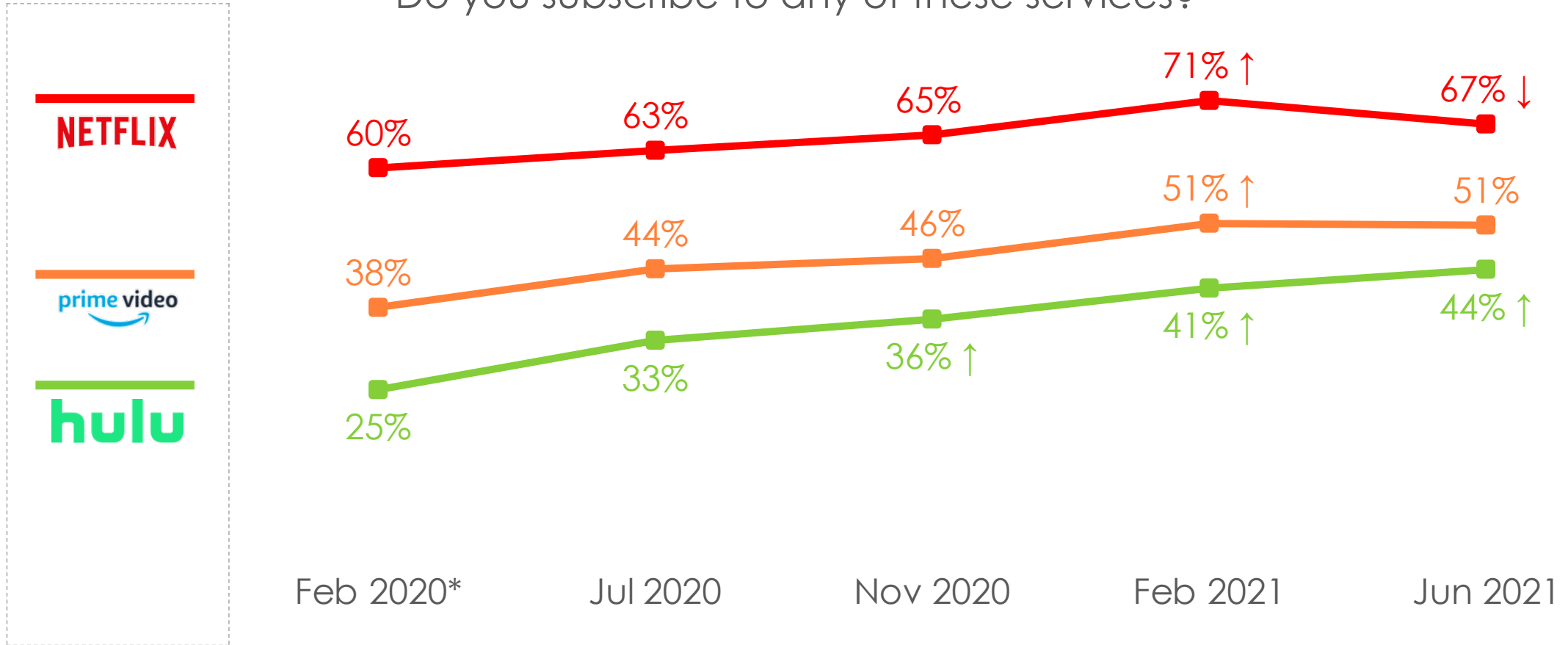


BASE: TOTAL SAMPLE JUN 2021 (n=3,000)  
Q10a1. As pandemic restrictions ease and movie theaters reopen, how do you expect to watch movies in the next year?



# DIFFERENTIATION WORKS

Do you subscribe to any of these services?

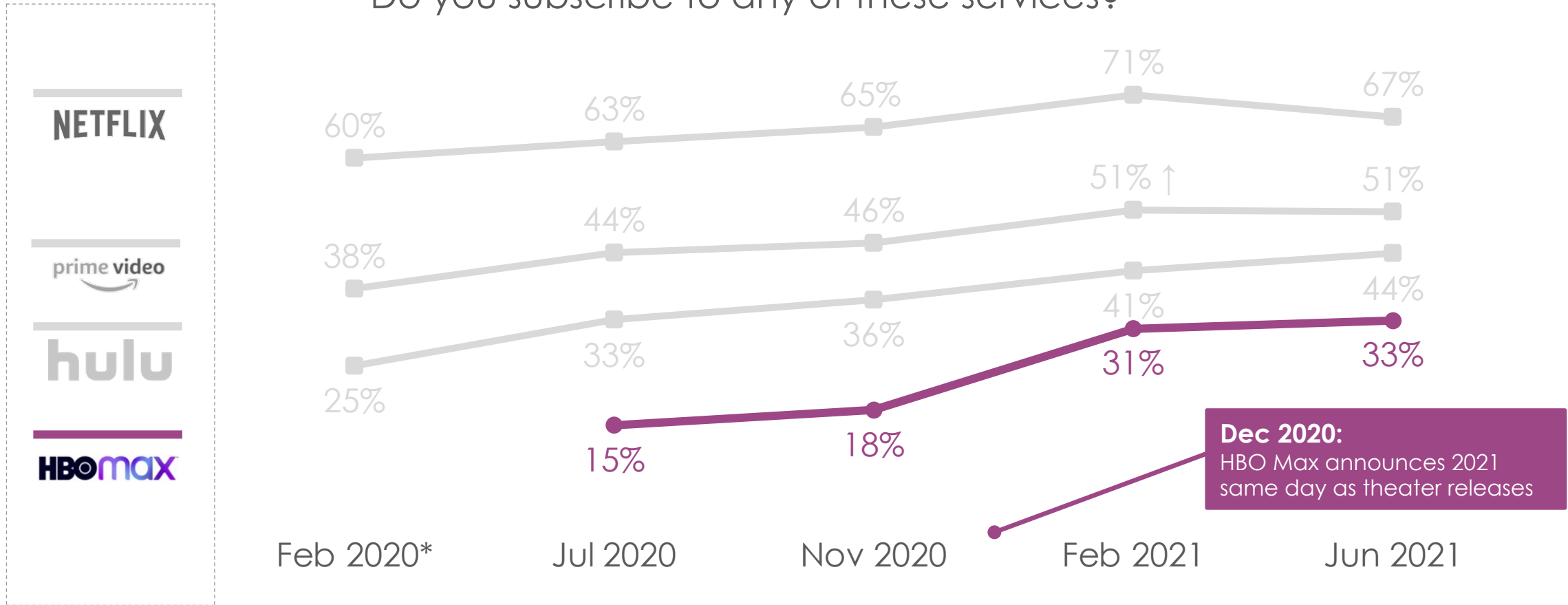


\* Data from Evolution of Video Branding (Q2a, Q3a), a Hub Report  
 BASE: TOTAL RESPONDENTS IN EACH GROUP – FEB 2020 (n=2,015), JUL 2020 (n=3,026), NOV 2020 (n=3,000), FEB 2021 (n=3,008), JUN 2021 (n=3,000)  
 Q4a. Do you currently have any of the following television services in your home?  
 Q5a. Do you have any of these online streaming subscriptions, where you pay a monthly or annual fee for access to shows and movies online?



# DIFFERENTIATION WORKS

## Do you subscribe to any of these services?



\* Data from Evolution of Video Branding (Q2a, Q3a), a Hub Report  
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 Q4a. Do you currently have any of the following television services in your home?  
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## UNIQUE VS. "NEW"

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- Content from other categories
- NFTs based on IP
- Integrated sports betting





# CONCLUSIONS

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#1

The TV ecosystem is more crowded than ever

#2

Aggregation is more important than ever

#3

Smart TVs will change discovery of shows but also providers

#4

FASTs have more to offer than just being free

#5

Exclusive content differentiates from backdrop of similar options



QUESTIONS?

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