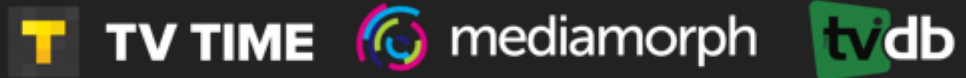


# THE STREAMING WARS

Engaging the Connected Consumer

WHIP MEDIA GROUP



**Carol Hanley** Chief Revenue & Strategy Officer

**OTT Supply Chain Academy**

March 3, 2020

# It's a New World

Key themes that we're hearing



**CUSTOMERS ARE  
IN CONTROL**

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**INSIGHTFUL  
AUDIENCE DATA**

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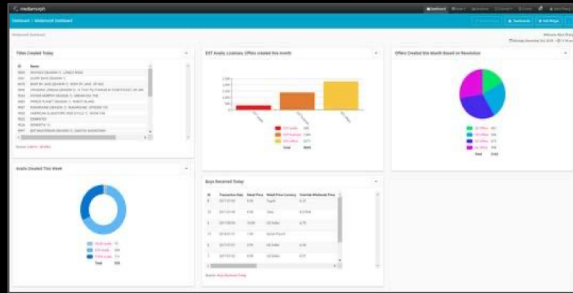


**FRICTIONLESS  
DISTRIBUTION**

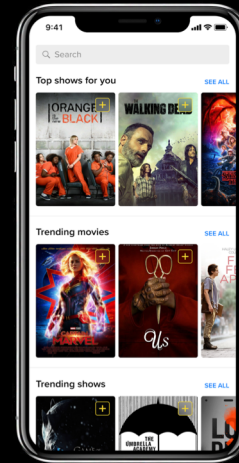
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# WHIP MEDIA GROUP

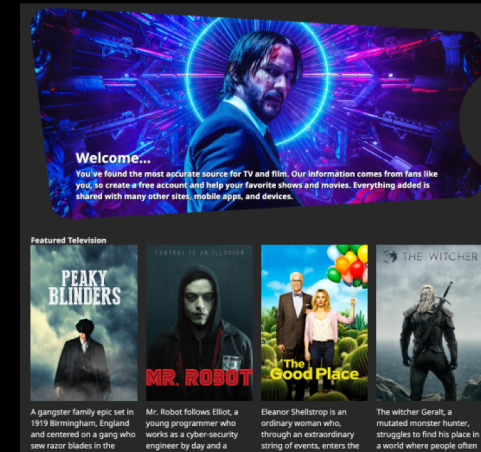
Powered by World Class Cloud Platforms to Optimize Your Content Value



Content Value Management



1st Party Audience Insights

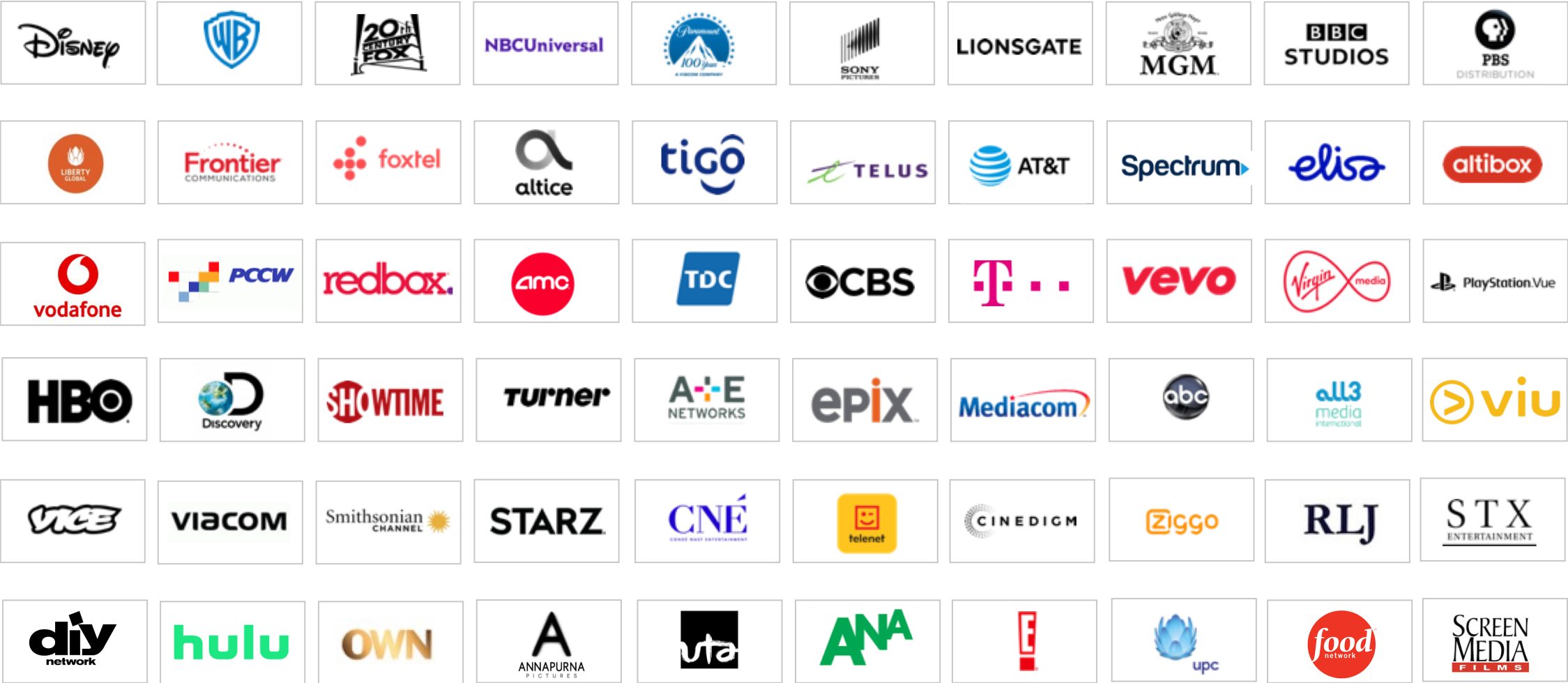


Metadata Solutions

# Powering the Leading M&E Companies



Studios, Operators, Broadcasters and OTT Platforms depend on Whip Media



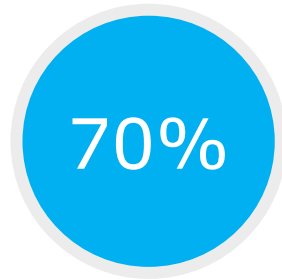
# Delivering Value at Unparalleled Scale

Tracking billions of consumer actions and financial transactions



## Content Licenses

Actively managed on behalf of content providers



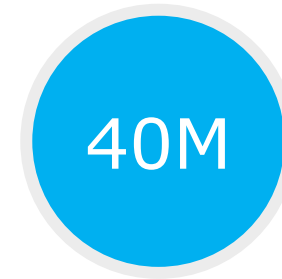
## Of the Total Universe

Global digital transactional by revenue



## TV VOD Platforms

Performance tracking (AVOD, SVOD, TVOD, EST, PPV)



## User Engagements (per Month)

Including emotions, ratings, and reactions



## TV Episodes & Movies

Tracked on a daily basis



# Content Choices Are More Complex Than Ever Before

The Consumer is in Control

# Choices are Changing Everything

No sign the streaming wars will slow down



# Competition for the Connected Consumer

Content is evolving with a new generation of "TV"



## SOCIAL NETWORKS



Tik Tok

## PUBLISHERS



## INTERESTS





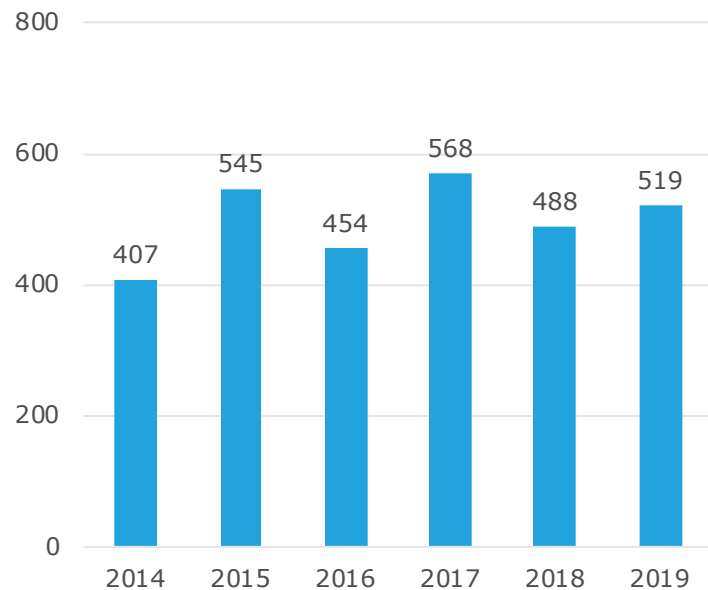
# Decline in Theatrical Attendance Fueling the Streaming Wars



Admissions by Year (in millions)\*

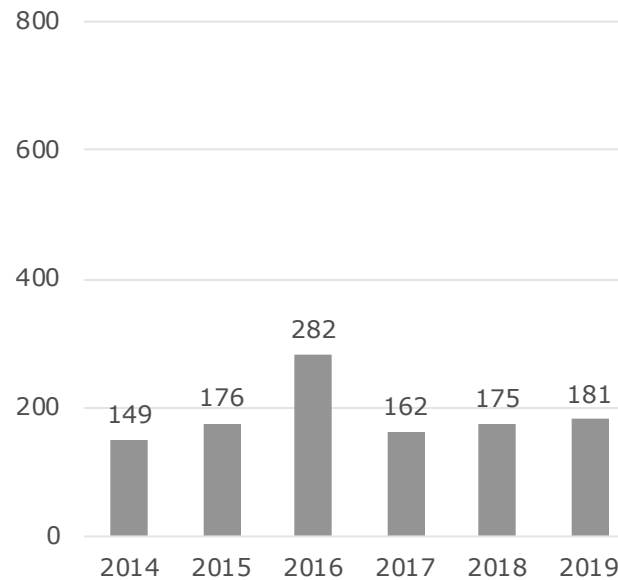
## Budget > \$100M

This has been the largest growth segment at the box office



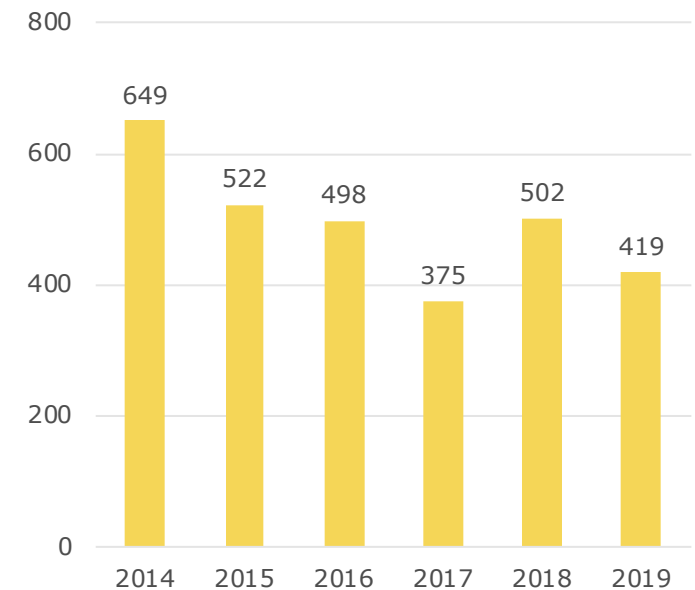
## Animation

With the exception of 2016, admissions have held steady over the past six years.



## Everything Else

This includes comedies, dramas, horror films, action/thrillers, documentaries, live-action family



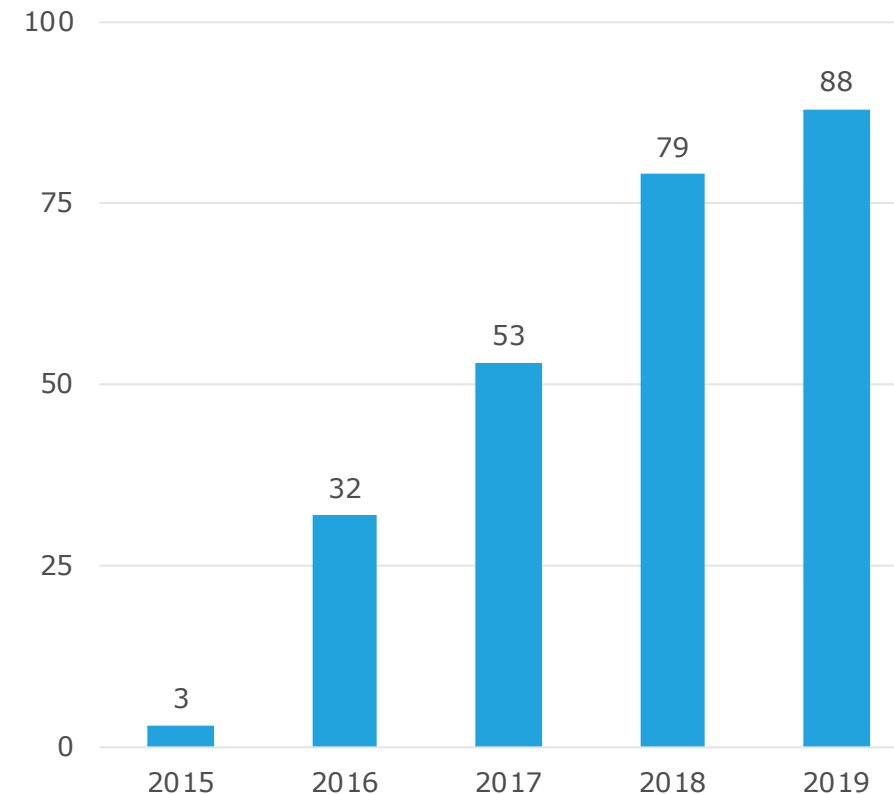
\*2020 Study by United Talent Agency

# Original Streaming Films



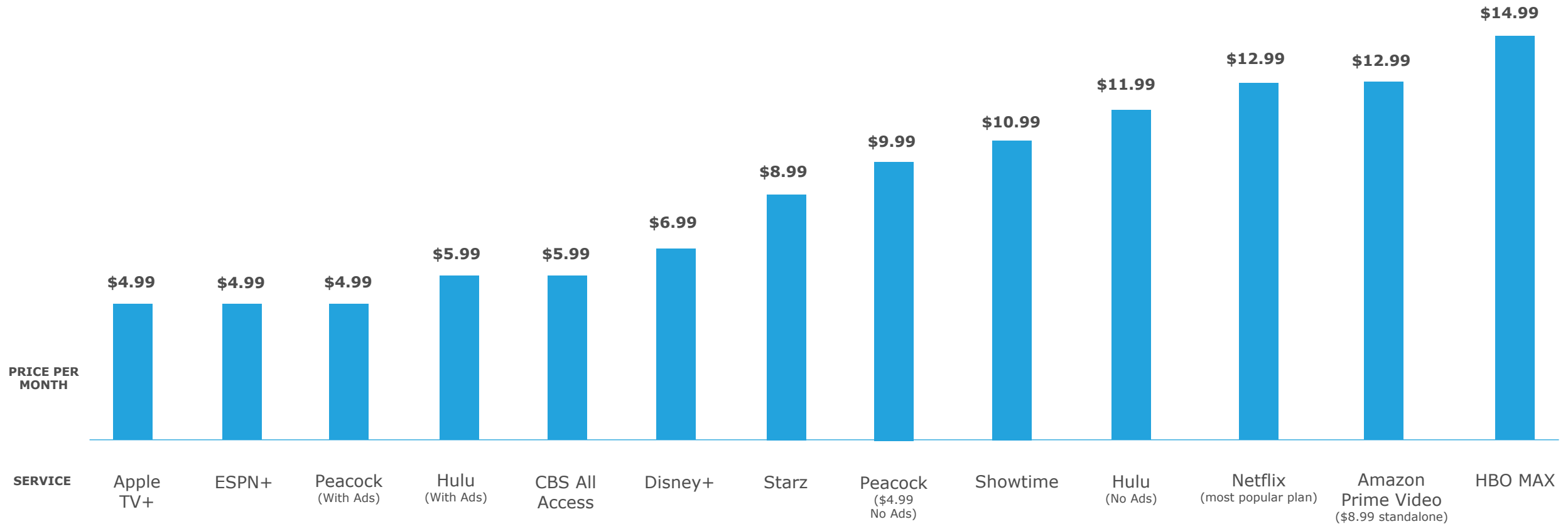
- Back in 2015, there was only three feature-length original film on the major (Netflix, Hulu, Amazon) streaming services
- Not only did two new streamers enter the mix in 2019 (Disney+, Apple TV+), but the number of original films ballooned to 88
- **These films compete most directly with the films in the “EE” Group**

## Feature-Length Streaming Originals



# The Big Question

How much are consumers willing to pay?

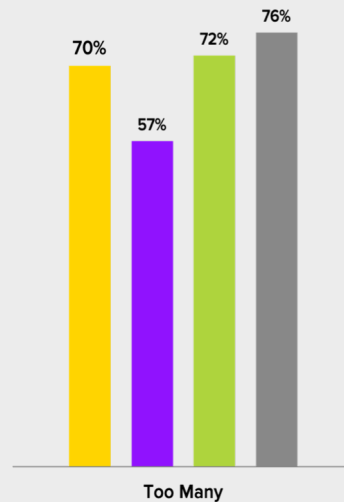


# What Do Consumers Think?

## 1<sup>st</sup> Party Insights: Consumer Sentiment

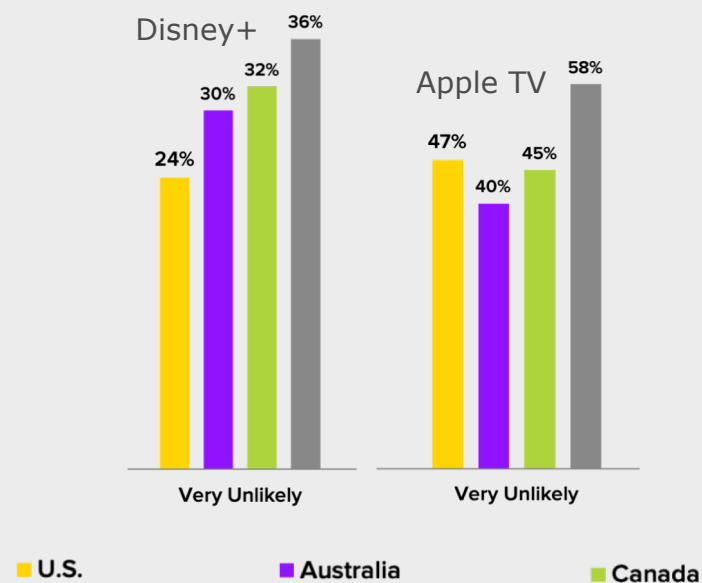


While consumers think there are too many choices...



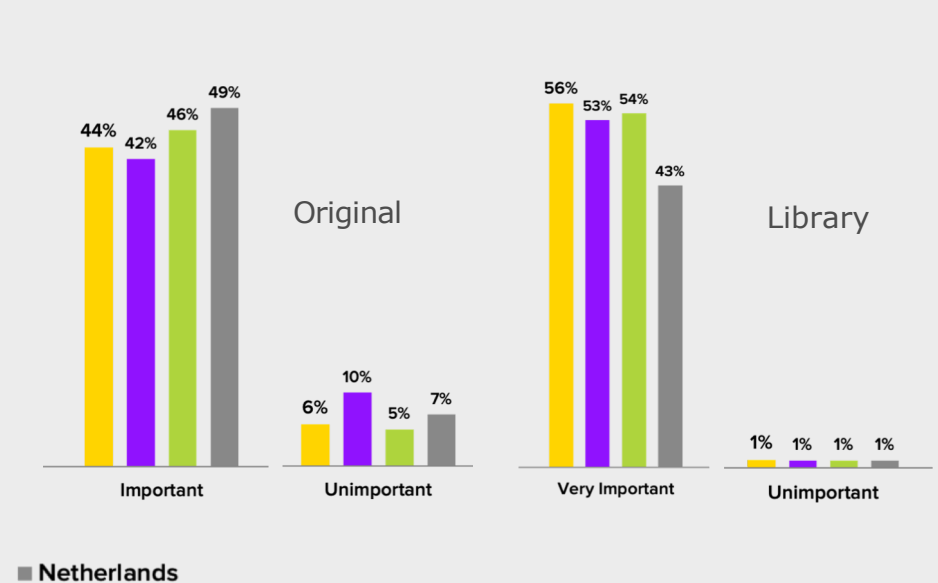
# of Streaming Services

...they're willing to pay for multiple services



Likelihood to drop a current service for a new one

...if the streaming service offers the right content.



Value of content when subscribing to a service

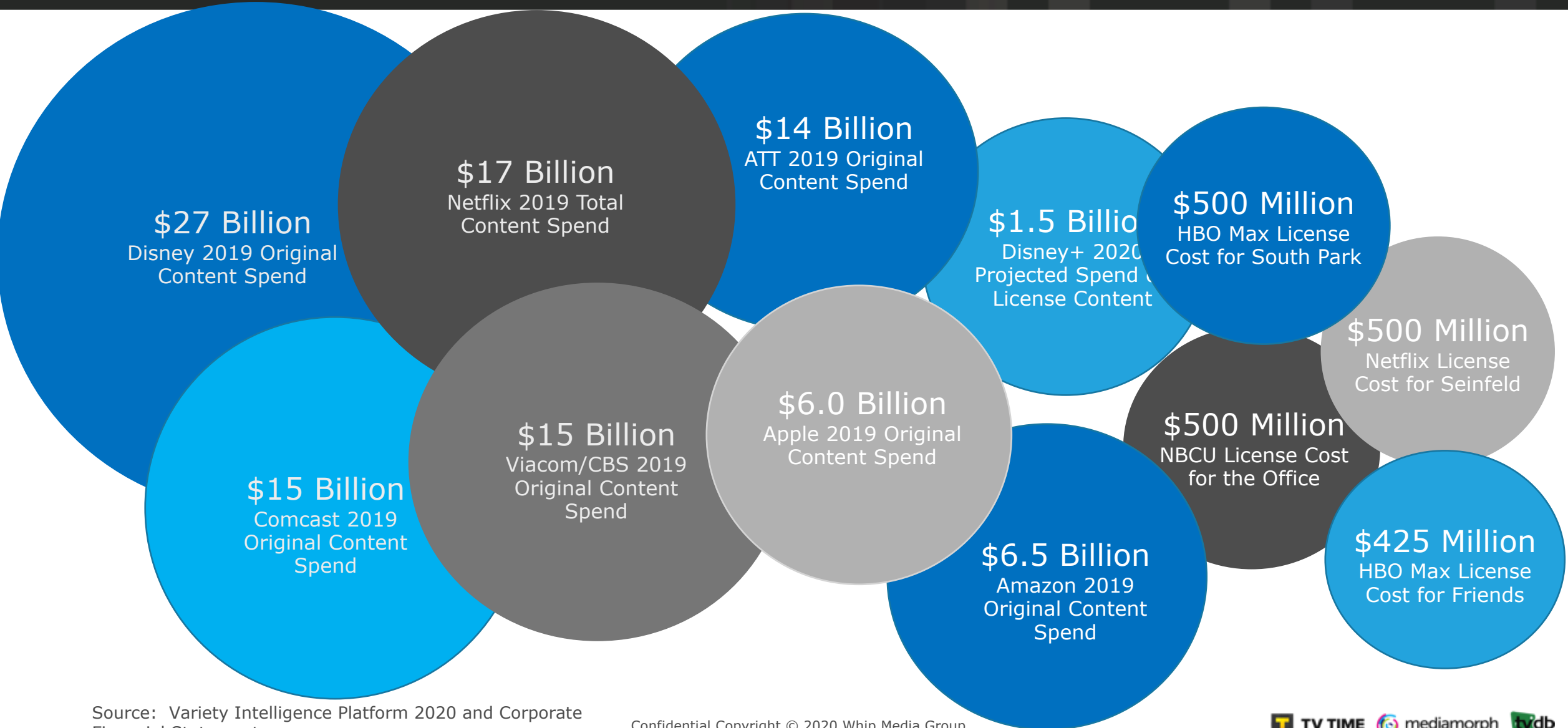
# Content Costs Drive Need For New Data

High stakes decisions

# Content Costs are Massive and Growing

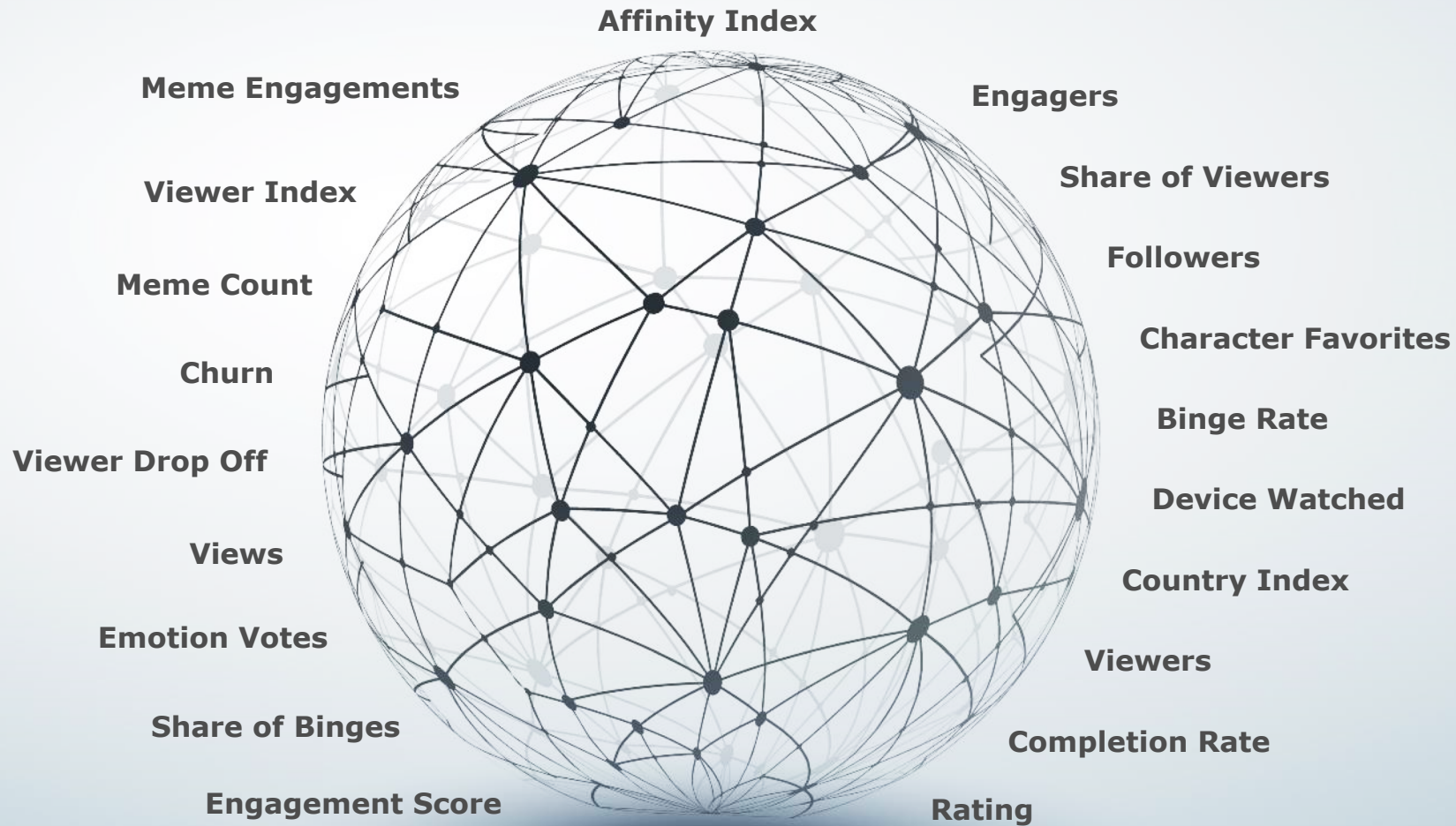


How can you get smarter about maximizing that investment?




# The Why Behind the Watch

The predictive power of data



*100+ Countries, Regions, Custom Geographies*

A man and a woman are standing in a library, looking at a book together. The woman is on the left, holding the book, and the man is on the right, looking at it. They are surrounded by bookshelves filled with books. The lighting is warm and focused on the book.

Case Study

# YOU: Lifetime to Netflix

Lifetime had a hit on their hands and did not know it



# YOU is a Hit on Netflix

We predicted its success even before it's original premier on Lifetime



## Lifetime Then

### Anticipation Report (Global)

Published in Aug. for Sep. 2018 shows

**TV TIME'S ANTICIPATION REPORT  
TOP SEPTEMBER SHOWS**

Millions of viewers from around the world use the TV Time app to track and react to the cable, broadcast, and OTT shows they're watching. Based on global data from our users, these are the most anticipated series for September 2018.

NEW SHOWS			
1	YOU	9/09/18	LIFETIME
2	Maniac	9/21/18	NETFLIX
3	The Purge	9/04/18	USA
4	Manifest	9/24/18	NBC
5	Mayans M.C.	9/04/18	FX

RETURNING SHOWS			
1	Marvel's Iron Fist	9/07/18	NETFLIX
2	Atypical	9/07/18	NETFLIX
3	American Horror Story	9/12/18	FX
4	BoJack Horseman	9/14/18	NETFLIX
5	The Good Place	9/27/18	NBC

**T** Methodology: TV Time ranked the tens of millions of show follows for TV series in our app to determine the most anticipated shows of September 2018.

## NETFLIX Now

### Anticipation Report (Global)

Published in Nov. for Dec. 2019 shows

**TV TIME'S ANTICIPATION REPORT  
TOP DECEMBER SHOWS**

Millions of viewers from around the world use the TV Time app to track and react to the cable, broadcast, and OTT shows they're watching. Based on global data from our users, these are the most anticipated series for December 2019.

NEW SHOWS			
1	The Witcher	12/20/19	NETFLIX
2	V Wars	12/05/19	NETFLIX
3	The L Word: Generation Q	12/08/19	SHOWTIME
4	Reprisal	12/06/19	hulu
5	Truth Be Told	12/06/19	Apple tv+

RETURNING SHOWS			
1	You	12/26/19	NETFLIX
2	Lost in Space	12/24/19	NETFLIX
3	Vikings	12/04/19	HISTORY
4	The Marvelous Mrs. Maisel	12/06/19	prime
5	Marvel's Runaways	12/13/19	hulu

Discover what to watch next. [App Store](#) [Google Play](#)

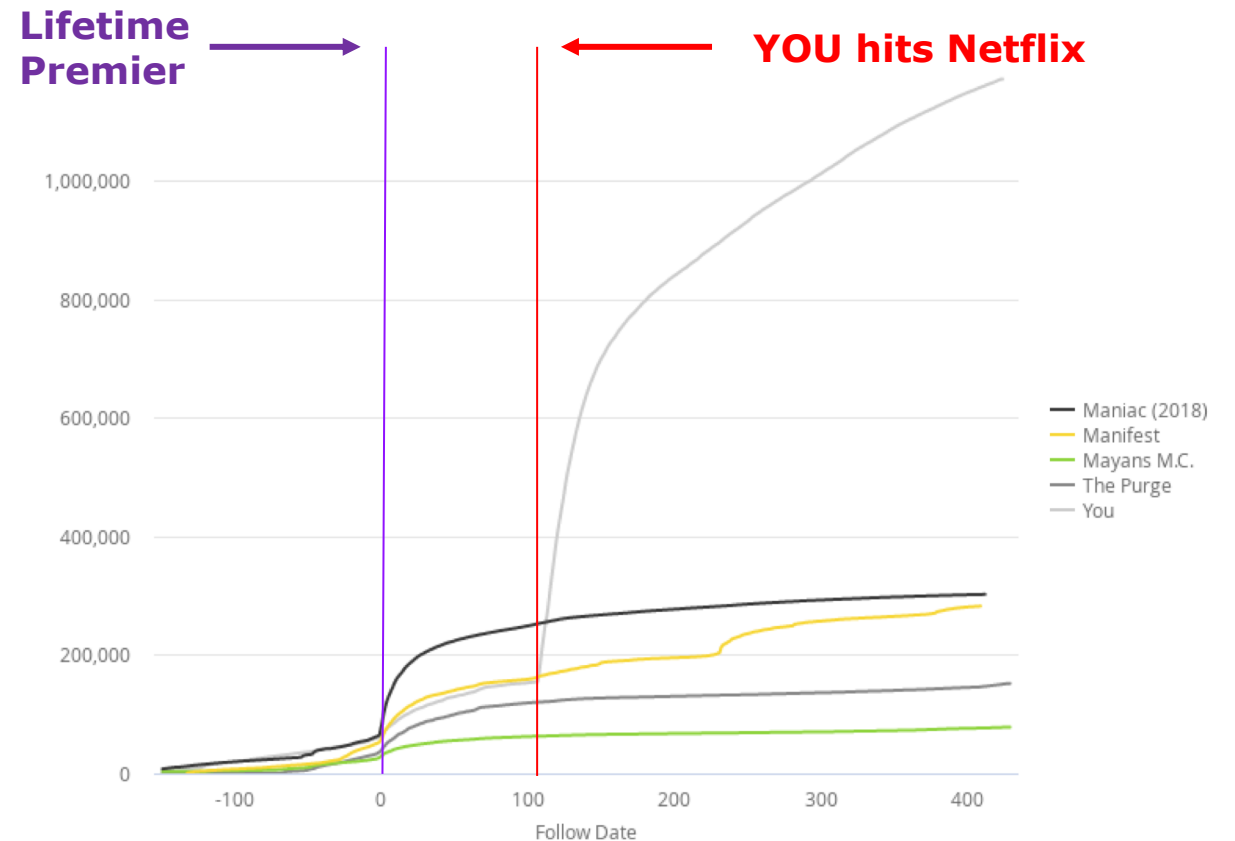
To receive the "Anticipation Report" each month, email [datereports@tvtime.com](mailto:datereports@tvtime.com) **T** TV TIME [www.tvtime.com](http://www.tvtime.com)

# Data Insights Predict a Hit

Not all channels are created equal for the same piece of content



- YOU had momentum in followers leading up to its premiere and the first few months (post-launch) on Lifetime
- Demographics for "YOU" skew female and young
- Lifetime demographics skew female, so high demand anticipated
- Landing on Netflix exposed the show to both a female AND younger global audience, driving a higher demand trajectory



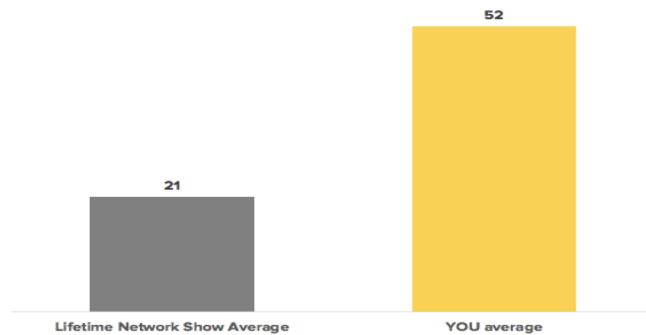
# Engagement a Stronger Predictor of Show Success



Viewership metrics insufficient for predictive insights

## Average Engagement Score

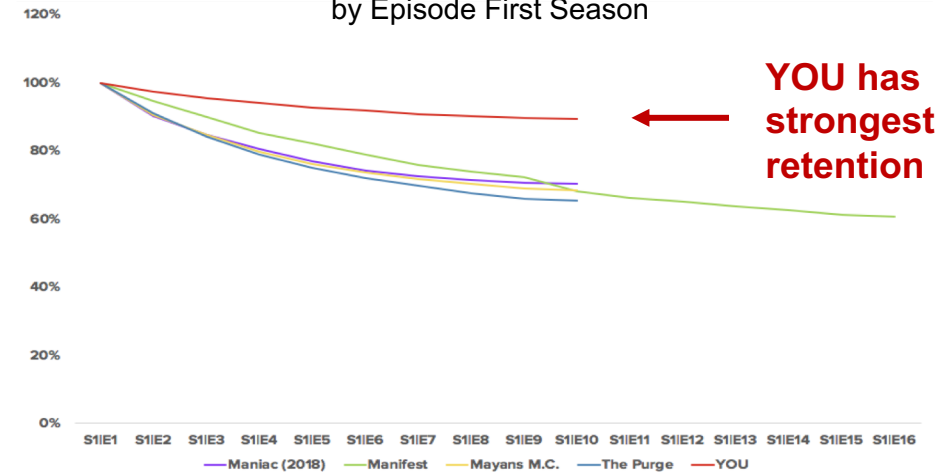
Fall 2018 (Sep 1 - Dec 25, 2018)



## YOU Audience More Engaged than Other Lifetime Shows

- When considering Lifetime's most viewed shows during the Fall 2018 time period, YOU had more the double the engagement score than Lifetime's other original fare
- S1E1 to S1E10, YOU engagement grew 30%

## Viewer Retention, by Episode First Season



## Stronger Viewer Loyalty

- Viewers watched all the way through S1, with a full 90% completing. This was at least 20 points higher than competition (e.g. other highly anticipated new shows debuting in the same month) when it comes to retention

A photograph of two men standing in a kitchen, looking at each other. The man on the left is wearing a dark patterned shirt, and the man on the right is wearing a dark button-down shirt. In the foreground, there is a table with various snacks, including a box of TCHO chocolates, a basket of candy, and a vase of flowers. The background shows a kitchen counter, a mirror, and a window with a floral pattern.

# Conclusion: Traditional Metrics Failed

## Consumer Engagement, Data Insights and Frictionless Distribution

**THANK YOU**

**Carol Hanley**

**[chanley@whipmedia.com](mailto:chanley@whipmedia.com)**

