



Streaming and CTV Insights

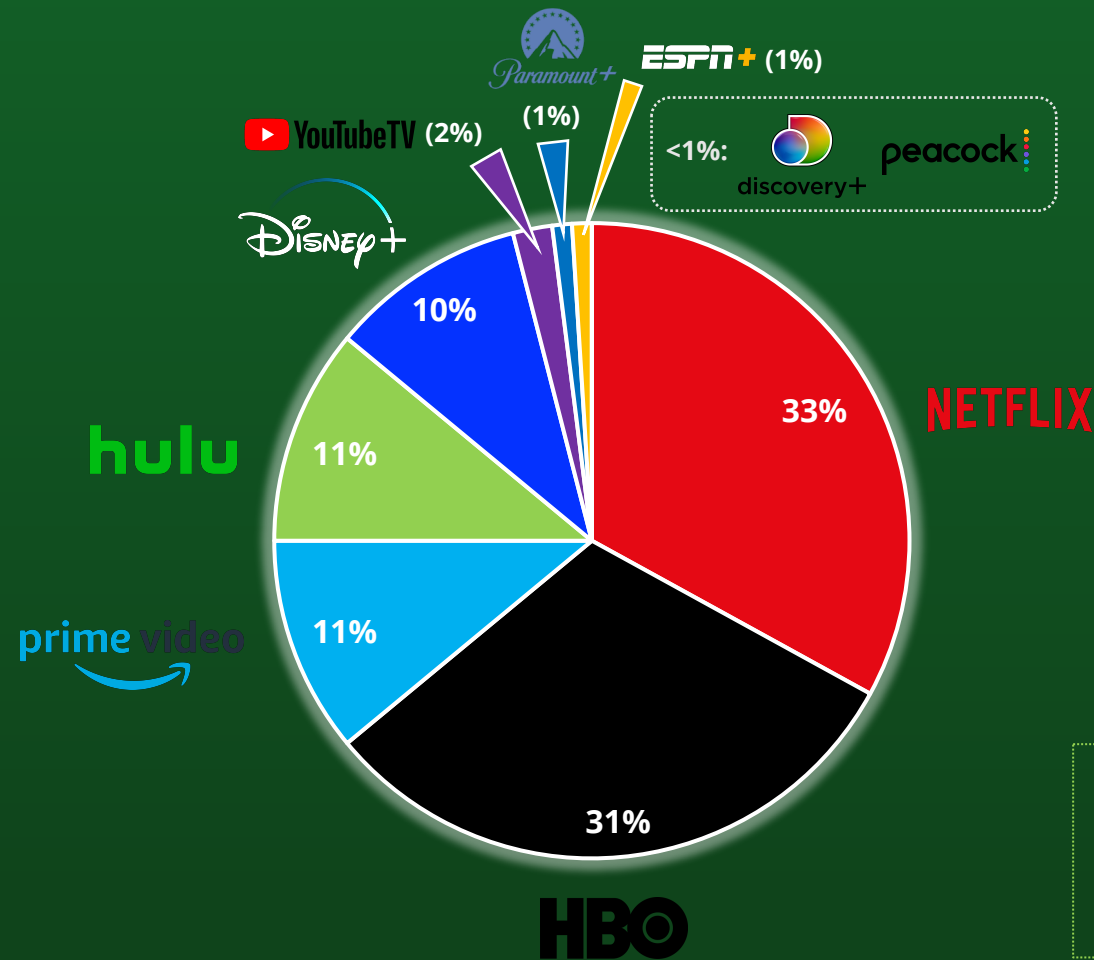
Geo: Global

Time Frame: March 2020 - May 2021

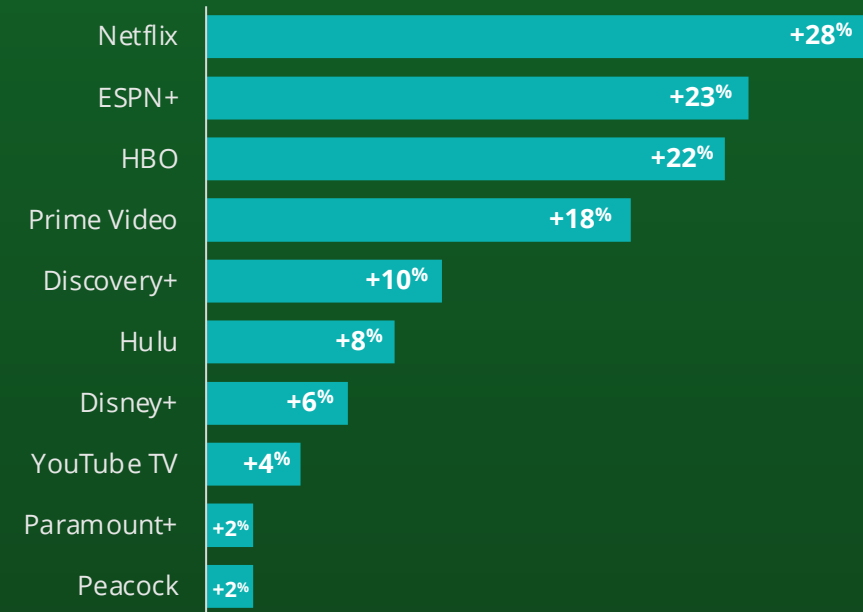
The Streaming Field is Narrow

Online Engagement by a Global CTV Audience

Percent Share of Engagement (%):



Recent Month-Over-Month Growth in Engagement (%):












There are five services that capture the majority of streaming engagement, and Netflix and HBO together double the share of voice of their competitors. Even as smaller services grow, Netflix and HBO continue to grow as well, keeping the field narrow. If the top competitors continue to innovate and buy out smaller services, they will keep their share of the market.



Services Are Searching for Their Niche

Online Engagement by Streaming Service Audiences

Streaming Service Index by Genre:

	 discovery+	 Disney+	 HBO	 hulu	 NETFLIX	 Paramount+	 peacock	 prime video	 YouTubeTV
Action & Adventure	0.02x	3.60x	5.37x	8.18x	4.45x	1.44x	0.01x	1.69x	1.09x
Animated & Family	0.02x	7.64x	5.26x	5.18x	5.68x	1.27x	1.11x	1.07x	0.08x
Comedy	1.13x	2.20x	3.93x	8.29x	3.74x	0.51x	1.28x	1.43x	1.30x
Documentary	1.12x	0.03x	3.20x	3.12x	2.55x	0.29x	0.84x	0.17x	0.09x
Drama	0.01x	0.05x	2.62x	1.75x	1.30x	0.19x	1.04x	1.11x	0.04x
Horror	0.01x	0.07x	5.00x	2.19x	2.98x	0.67x	0.00x	1.37x	0.04x
Science Fiction & Fantasy	1.92x	1.30x	4.41x	6.72x	4.33x	8.25x	0.01x	0.34x	0.09x
Crime & Mystery	0.00x	0.02x	5.60x	2.08x	6.47x	0.04x	0.14x	0.19x	0.02x

Services are experimenting with genres to find the content their audiences are hungriest for, to prevent losing subscribers to other services. But if the bundling and buyouts continue, their niches will have to be clear to protect their corner of the streaming space.

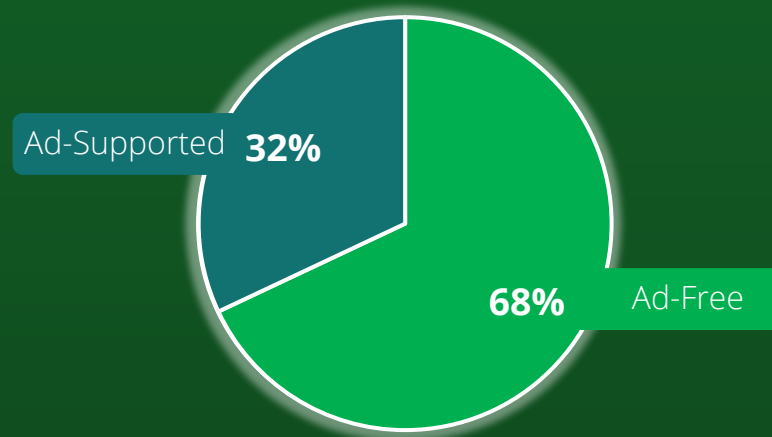
Online engagement is measured by searches, clicks, and shares | Geo: U.S | Time frame: March - May 2021 | Index Score (i.e., 7.64x) indicates how much more likely a user in this audience is to engage with a topic compared to the average ShareThis user



We're Approaching a Crossroads

Online Engagement by a Global CTV Audience

*Percent Share of Engagement for Ad-Free
Versus Ad-Supported Content (%):*



It looks as though consumers are more willing to pay more for ad-free content, though there is certainly a cap to the amount they will pay. Tiered subscription services are currently exploring that boundary.

Top Keywords from a CTV Audience:

Are we headed for a great rebundling or an all-out subscription war?

Platform Offerings Episodic Releases
Tiered Subscription Model Too Many Subscriptions
Live TV Multiple Subscription Apps Streaming Wars
Ad-Free Paywall Premium Content
Network Bundle Premium Subscription Welcome Bundle
Fewer Ads Subscription Fatigue Without Ads
The Great Rebundling No Ads Subscription Boom
Incremental Payment Model Package Streaming Services
Access Original Content Consolidate Plans Creator Economy
Flexible Plan Limited Ads Tiered Plan



Services Are Experimenting With Their Offerings

Online Engagement by a Global CTV Audience

Year-Over-Year Change in Online Engagement (%):



+213%

Live TV

While in-person events were on hold during the pandemic, live TV grew rapidly as an outlet for experiencing TV events along with other people.



+58%

Bundles, Buyouts, & Mergers

The CTV landscape is constantly in flux as content deals are negotiated and companies merge and buy each other out, the most recent of which is Amazon's purchase of MGM. Will this trend lead to a handful of super-services down the road?



+32%

Straight to Streaming & Paywall Releases

The pandemic accelerated this trend, but studios are anxious to get movie-goers back in theaters. However, exclusive streaming releases are likely to stick around because of their convenience for consumers.



-29%

Free Trials

Free trials are declining as services make the news with content acquisitions to lure in new subscribers, or offer other incentives like bundles.

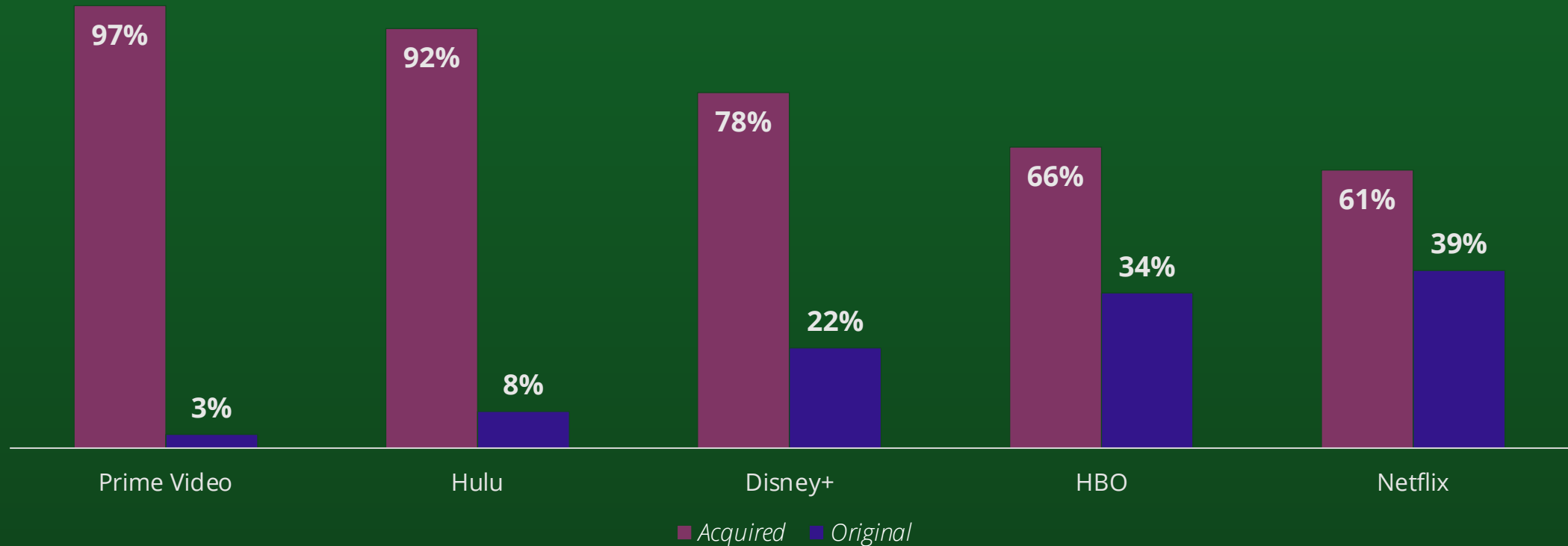


Online engagement is measured by searches, clicks, and shares | Geo: Global | Time frame: March 2020 - May 2021

Original Content is the New Frontier

Online Engagement by a Global CTV Audience

Percent Share of Searches for Acquired vs Original Content (%):



Searches for original content from streaming services versus acquired content show that original content is a successful diversification strategy, especially when it produces a hit like *Stranger Things* from Netflix or *Westworld* from HBO. The major streaming services are opting for more original content to draw in more viewers, and the trend has paid off - the more original content available on a service, the more viewers are seeking it out.

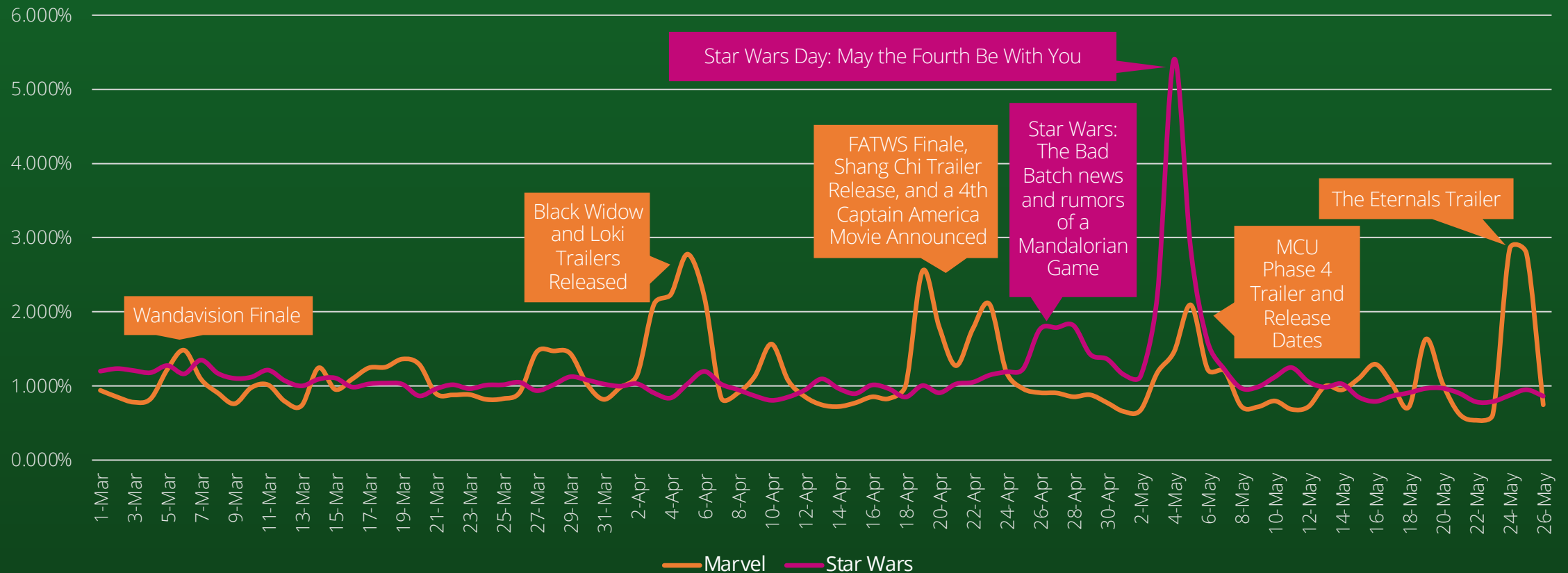


Online engagement is measured by searches, clicks, and shares | Geo: Global | Time frame: February - May 2021

Franchises and “Always On” Content Guarantee Continuous High Engagement

Online Engagement by the ShareThis Audience

Percent Share of Engagement With Marvel and Star Wars Franchises (%):



Marvel and Star Wars are great examples of franchises and universes that has content continuously available to fans through traditional movie releases, streaming TV, and social media events. Their news and releases ensured they were top of mind for their audiences this spring, and they have a long slate of upcoming content in all forms to look forward to.

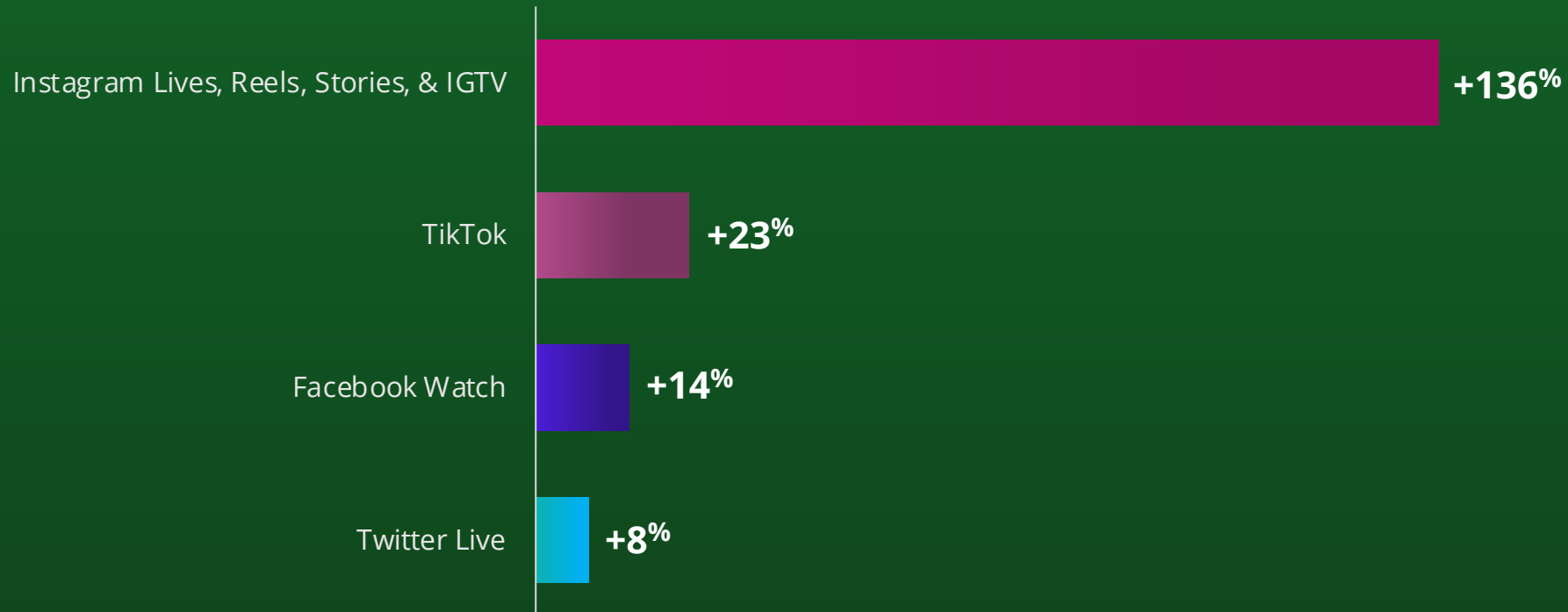
Online engagement is measured by searches, clicks, and shares | Geo: Global | Time frame: March - May 2021



Streaming Now Has to Compete With Social Media

Online Engagement by the ShareThis Audience

Year-Over-Year Change in Online Engagement (%):



Social media has officially entered the streaming TV arena. You can now watch TV live on Twitter, mark your calendar for TV-like events launched on Instagram, and watch short form content on all of these channels. The differences are shrinking between our big screens and our small screens, and social media is now a major competitor for CTV.



Online engagement is measured by searches, clicks, and shares | Geo: Global | Time frame: March 2020 - May 2021

ShareThis Predictions

Conclusions Drawn by Our Data In the CTV Space



We expect more merges, bundles, and buyouts between entertainment giants who have similar genre-based audiences, until there are a few key participants in the CTV space, each with their own niche.



We anticipate more franchises, universes, and “always on” content across all entertainment mediums.



We suspect the lines will continue to blur between social media, streaming content, and traditional channels until everything is simply referred to as “content.”



Audiences to Activate

Tap into ShareThis audiences to create a well-rounded and holistic campaign. Consider the following segments in your activation strategy:

Relevant Categories

- Arts & Entertainment > Movies > Action & Adventure Films
- Arts & Entertainment > Movies > Animated Films
- Arts & Entertainment > Movies > Comedy Films
- Arts & Entertainment > Movies > Documentary Films
- Arts & Entertainment > Movies > Drama Films
- Arts & Entertainment > Movies > Horror Films
- Arts & Entertainment > Movies > Science Fiction & Fantasy Films
- Arts & Entertainment > Movies > Thriller Crime & Mystery Films
- Arts & Entertainment > Online Media > Streaming
- Arts & Entertainment > TV & Video
- Online Communities > Social Networks

Custom

Craft your own custom audiences using relevant privacy compliant signals, such as streaming bundles, ad-free content, original streaming content, and more.



Thank You

