LONDON
2020

THE SHOW
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MRG Conference

Results – in summary

# Appointment to view? Exploring Mental Availability in SVOD

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COG Research
Christopher White Consulting

STRAT7 ResearchBods

# True Collaboration

STRAT7 **Research**Bods

COG logo

**Christopher White**
Consulting

S7RB – best in class panel, research
services and media specialisms

COG consulting – experience
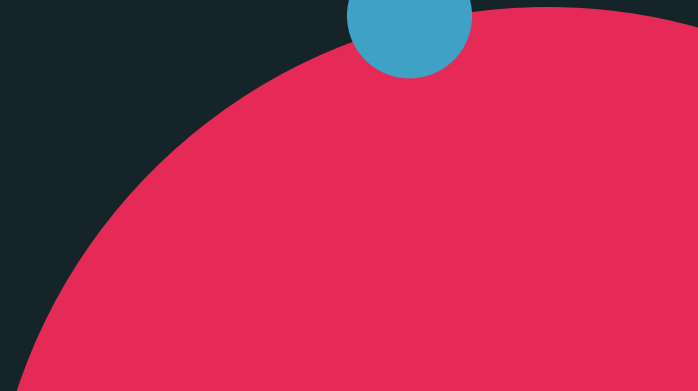/ leaders in implicit techniques

Chris White – pioneered use
of MA in this way

thinkbox

mtm

# Overview

# The context

Part 01

**NETFLIX**

23% YoY growth

————

**Disney+**

50 million new subscribers

————

**britbox**

Smashed Y1 targets

————

**but**, is too much choice in SVOD leading to analysis paralysis?

# What we did

Part 02

What we did.

# We set out to understand:

**01** The size and shape of the opportunity for SVOD in the UK – defining the key need states and viewing occasions
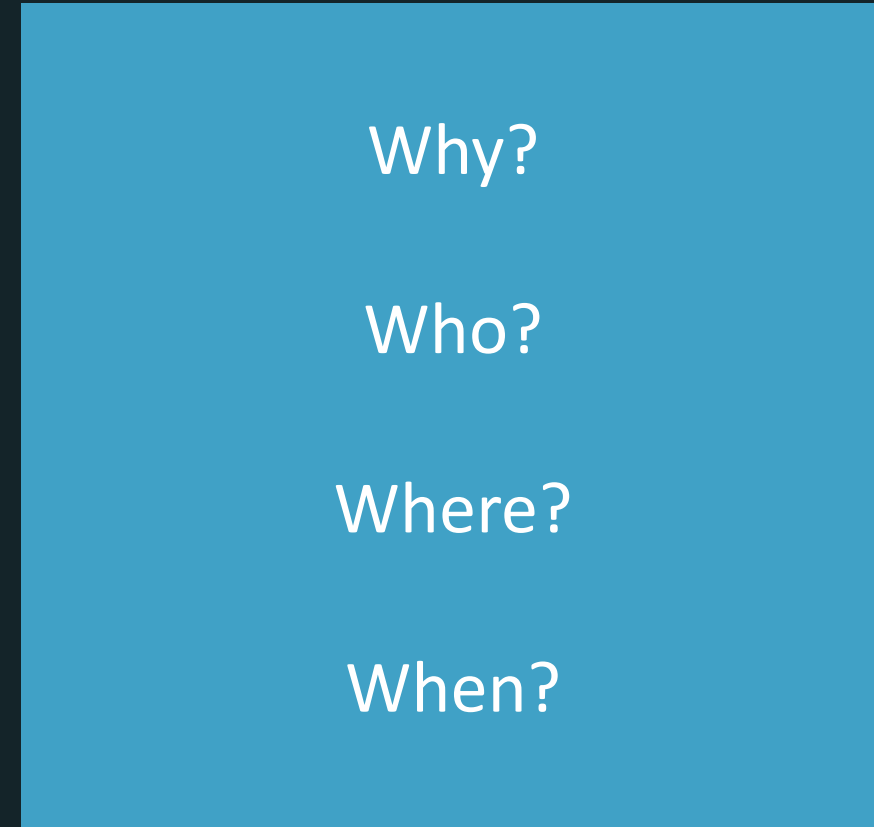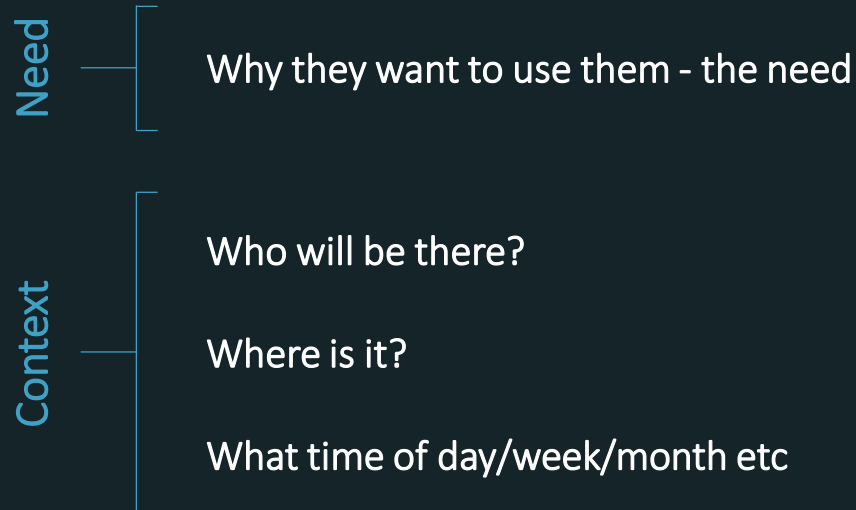
**02** How five of the UK's top SVOD brands fare in terms of mental availability and what they could learn from Byron Sharp's Mental Availability theory.

# When do people think about brands?
## CUED RETRIEVAL

People think brands in particular buying and usage situations

This will be made up of?

**Need**
Why they want to use them - the need

**Context**
Who will be there?

Where is it?

What time of day/week/month etc

Why?

Who?

Where?

When?

Source: How Brands Grow, Byron Sharp, Part Two

# We looked at key contexts and need states in order to understand CEP's in SVOD

## Contexts

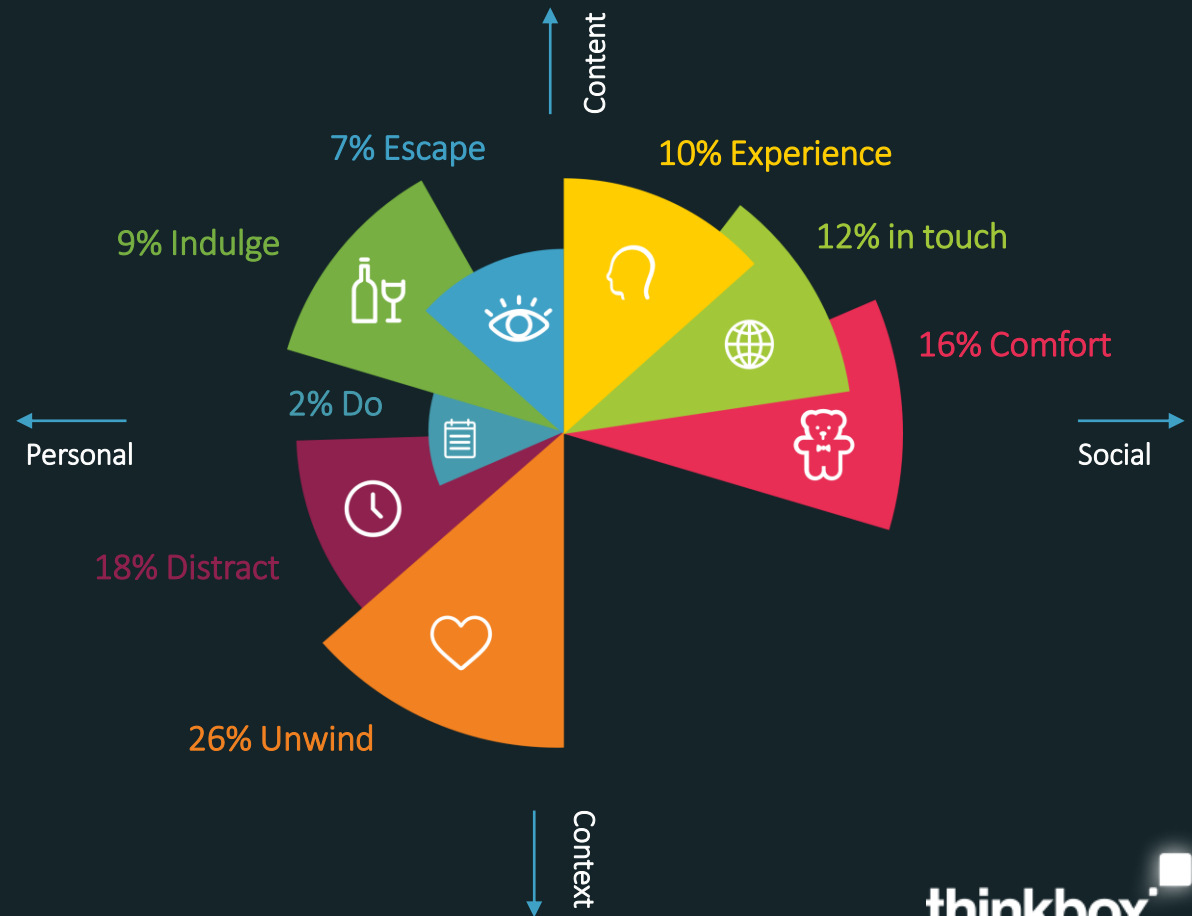WHO you watch with

WHEN you watch

WHERE you watch

## Needs

There are 8 states which drive video viewing

Content

7% Escape

10% Experience

9% Indulge

12% in touch

16% Comfort

2% Do

Personal

Social

18% Distract

26% Unwind

Context

thinkbox

# What is mental availability?

Mental Availability measures brand strength in terms of how consumers actually think when they want to use/buy a brand rather than abstract brand attributes.

It is even more pertinent in times of behaviour change.

**Successful brands have multiple Category Entry Points (CEPs)**

Context: who, when, where

**Category Entry Point:**
To unwind alone on the sofa after a long day

Usage need: why you buy it

Methodology

# A UK-wide study with over 3000 nat rep viewers, across 2 waves

Our first survey established need states and usage situations for SVOD viewing:

- Who do viewers watch with?
- When do they watch (at which times of day)?
- On what device do they watch?
- What need does viewing meet?

**This allowed us to create Category Entry Points for SVOD**

We then utilised state-of-the-art implicit measurement questions across 22 need states and contexts and 5 of the biggest brands in the SVOD market

NETFLIX    britbox    prime video
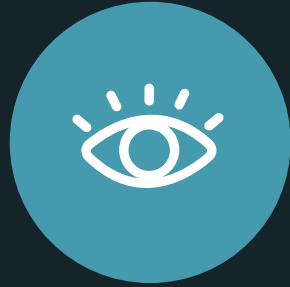
Disney+    NOW TV

# What we learned

Part 03

# Unwind and Escape are the top needs, followed by Distract and Comfort
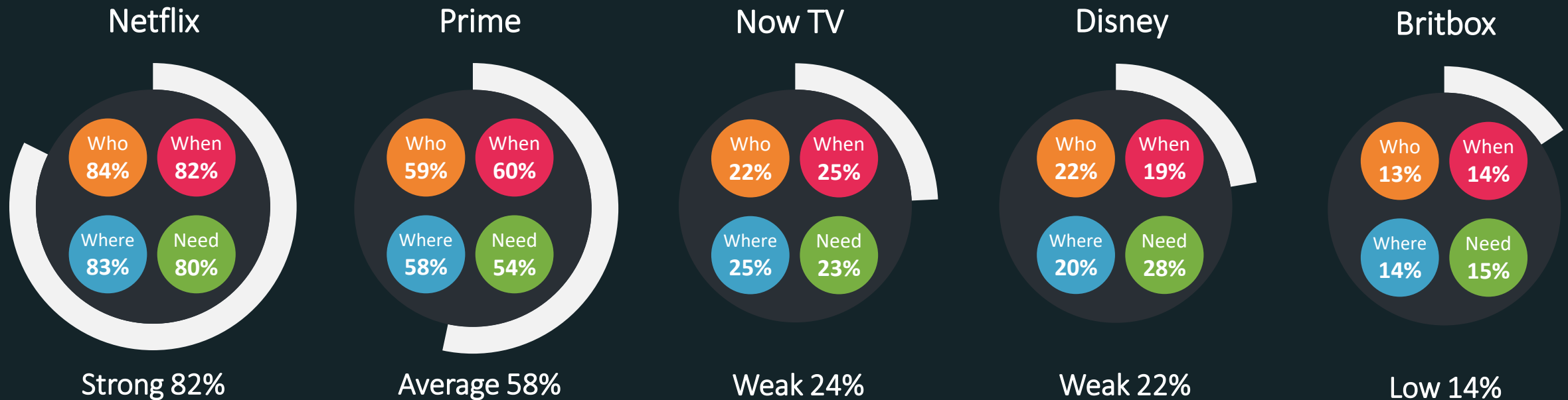
Unwind:
36%

Escape:
30%

Comfort:
11%

Distract:
10%

Indulge:
5%

Experience:
5%

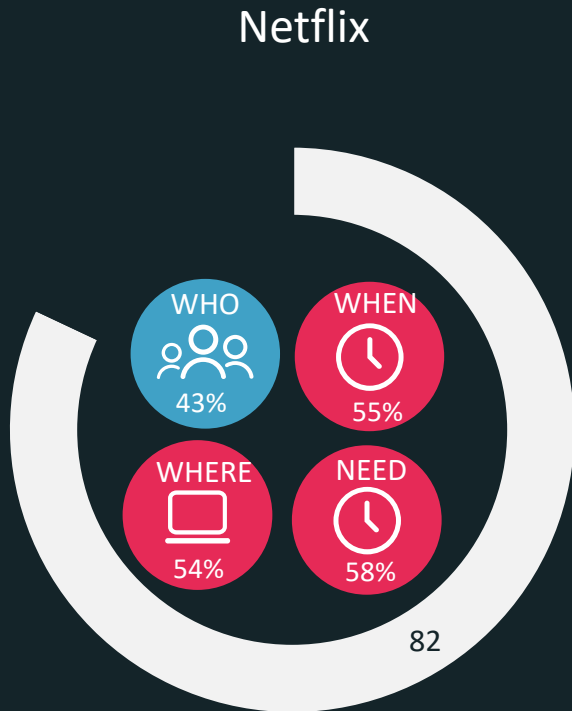# Netflix and Prime, unsurprisingly, score highest at explicit mental availability

| Netflix | Prime | Now TV | Disney | Britbox |
|---------|-------|--------|--------|---------|

**Netflix**
- Who 84%
- When 82%
- Where 83%
- Need 80%

Strong 82%

**Prime**
- Who 59%
- When 60%
- Where 58%
- Need 54%

Average 58%

**Now TV**
- Who 22%
- When 25%
- Where 25%
- Need 23%

Weak 24%

**Disney**
- Who 22%
- When 19%
- Where 20%
- Need 28%

Weak 22%

**Britbox**
- Who 13%
- When 14%
- Where 14%
- Need 15%

Low 14%

Legend:
- When
- Where
- Who With
- Need

Each components score looks at average % score from individual elements
Each component then weighted equally for total Mental Availability Score

The giants dominate but they have Achilles' heels

# Implicit reveals the mental maps are weak in key areas for the giants

## Netflix



| | |
|---|---|
| WHO 43% | WHEN 55% |
| WHERE 54% | NEED 58% |

82

## PRIME



| | |
|---|---|
| WHO 39% | WHEN 45% |
| WHERE 43% | NEED 47% |

58

Slow

Fast

Netflix have fast associations overall, sealing their position at the top.

But associations are slow on 'Who With' especially for:
- Alone
- With a Partner
- With Kids
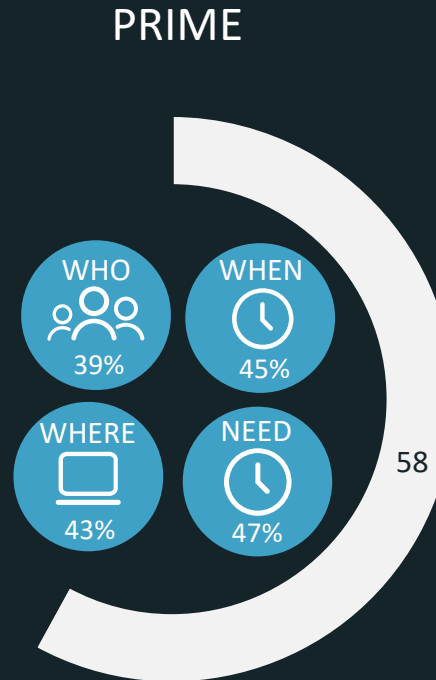
Prime has slow associations for all contexts and need states

This shows that the connections for the brand are weak compared to Netflix – consumers had to think about their answers before replying

Each components score looks at average % score from individual elements
Each component then weighted equally for total Mental Availability Score
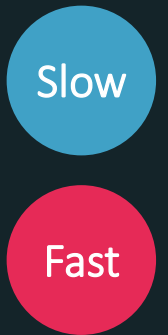
For marketers, the breakthrough insight is how the brands perform on the key category entry points.

# The top Category Entry Points for SVOD are:

**Forget about reality in the evening**

**Entering another world with partner**

**To relax by yourself after a long day**

**Decompress with your partner on the sofa**

**A diversion from chores during the day**

**Something familiar to watch with kids/partner**

The biggest entry points were around unwinding / decompressing, escaping with a bit of comfort and distraction thrown in

# Viewers know where to go to Escape and Unwind

Escape

Unwind

Forget about reality in the evening

Entering another world with partner

To relax by yourself after a long day

Decompress with your partner on the sofa
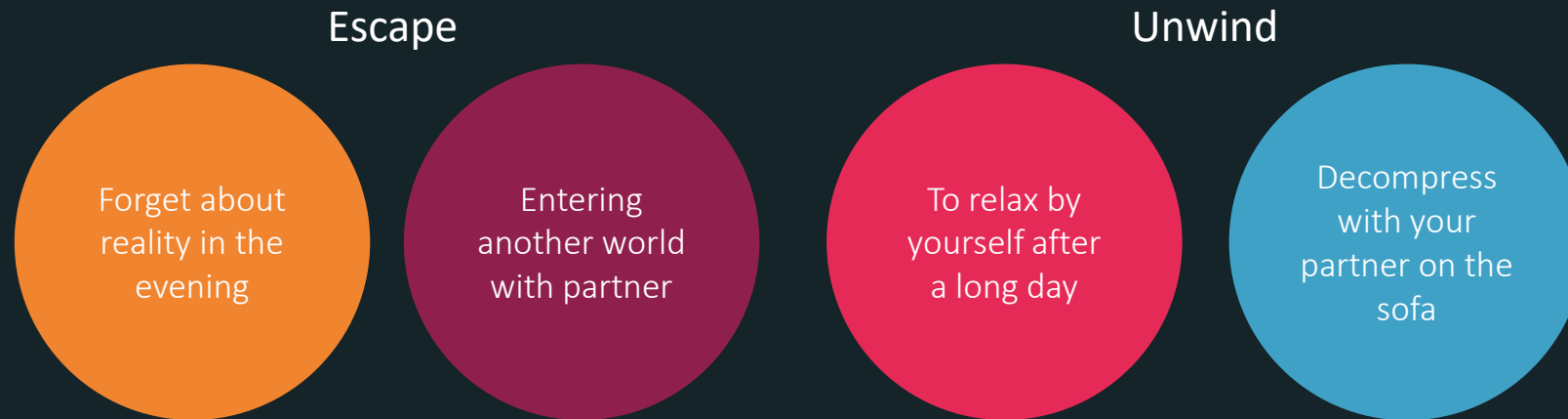
Mental Availability was high for need states around Escaping and Unwinding

Though viewers were less sure about which services were for solo, partner or family viewing with slow reactions

# No one owns Distract or Comfort

"There is so much going on in the whole world right now that **comfort** is what a lot of people are looking for."

"Lockdown has been pretty tough on my mental health... so being able to **distract** myself with lots of films and TV shows has been very important"

Something familiar to watch with kids/partner

A diversion from chores during the day

No SVOD provider is readily mentally available when viewers watch to distract or for comfort (despite these needs making up 10% of viewing time)

# Conclusions

Using Mental Availability as a framework for category analysis unearths new opportunities

As SVOD fragments, providers need more distinction

Success in SVOD comes from understanding key entry points and positioning accordingly

# Build a network of CEP's

## Distract — 5%
- Morning commute on mobile
- During work looking for an short break
- Afternoon with kids needing a breather

## Unwind — 23%
- Alone after a hard day at work
- With your partner on the sofa decompressing form the day
- With kids after they get in from school
- A Friday Night turn off with friends

## Escape — 26%
- Escape to another world with your partner
- Escape from reality of the world alone in the evening
- Late evening escape with friends

## Comfort — 9%
- Something familiar to watch with extended family
- Favourite series as a treat after work
- With the kids in the morning
- One of my favourite shows from the past

## Experience — 11%
- You and your partner watching a new experience
- Live sport or concert
- All the family
- Friends coming round at weekend

## Indulge — 4%
- Guilty pleasures late in the evening
- A box set for a quiet weekend

*Example only*

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# Implications for Prime – focus on key segments

Its associations are weak.

**It needs to try and build on all the main category entry points**

It could try and strategically build against Netflix – focusing on key areas in its comms to try and build stronger mental maps e.g.

- Partner viewing

- Friend Viewing

**prime video**

**Escape**

Escape to another world with your partner

Late evening escape with friends

**Unwind**

With your partner on the sofa decompressing form the day

**Experience**

You and your partner watching a new experience

Friends coming round at weekend

# Thank you

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**STRAT7** **ResearchBods**

21 Queen Street, Leeds, LS1 2TW, United Kingdom

T: +44 (0)113 246 9994
W: www.researchbods.com

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