

**Watch Together:
Is the Future of TV
Solitary or Social?**
June 2020



Thanks to Minerva Networks for sponsoring this edition.

Ring Digital #FutureOfTV Survey

Social TV Insights in a Personal-screen Era

Minerva is committed to building social TV experiences. Enjoy the insights!

Big Picture Insights

Part One: #FutureOfTV Surprises.

1. 38% felt “multi-tasking with background TV” was an important TV habit.
What if we built a TV service catering to it?
2. 31% selected Great Remote Control as critical content navigation feature.
Dynamic interfaces make this easier to achieve.
3. 48% Not at all Frustrated with their regular source of video / TV.
Surprising percentage of viewers have no complaints?

Sports Viewers Want Social TV

Part Two: Watch Together, Covid-style

1. Amongst Live Sports viewers, Top 2 Box interest for Watch Together is 39%
Seasonal TV Event & Movie Premiere viewers: 36%
2. For all TV Viewers, Top 2 Box interest in a virtual co-viewing concept is 26%
TV Yearning to be Social Again.
3. 30% want private, secure group sharing – *double* the number for public social sharing
High quality, private sharing, the operator superpower.



FutureOfTV + Watch Together

1.0: General Insights

2.0: Watch Together

3.0: Sports Interactivity

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1.0 Introduction to FutureOfTV Surveys

Surveys on streaming, time-shifting, personal screens and social interactivity.

Welcome. Ring Digital's June 2020 survey explores Social TV, Virtual Co-viewing, Sports Interactivities and Two-screen usage.

Panel of video and TV watchers. We probed viewing habits of 1,101 US internet users that watch five or more hours weekly.

Watch Together. Five questions dedicated to sports interactivity, simultaneous device usage and virtual "watch parties". Can social TV can fill the Sports Fandom gap?

Method. Ring Digital is responsible for the survey instrument, dataset collection and interpretations herein. Note that exploring latent demand in TV UX is a treacherous exercise in gut instinct, word-play and design. Feedback is encouraged. Any questions or comments? Email: Brian@RingDigital.tv

We used Google Surveys to field a representative sample of the US Internet User population. Sample is 1,101 complete responses from 6/9 to 6/12/20, a global Margin of Error ("MoE") of +/-2.95%. More detailed MoEs reported on specific slides.

Many thanks to the financial support of Minerva Networks, a leading enabler of today's best TV UX.

1.1 Survey Panel: All Video / TV viewers

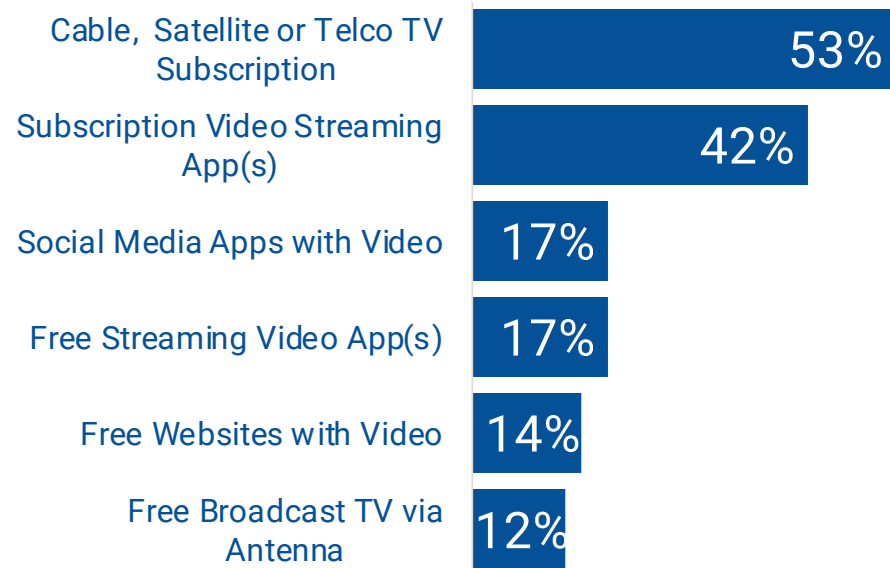
1,101 respondents that watch 5 or more hours video / TV weekly, any source

Sample size. 1,101 US Internet Users fielded by Google Surveys. All respondents claim to watch five or more hours of video and/or TV weekly. Pew Research estimates adult internet usage penetration at 90% in 2019.

Fielded. June 9 to June 12, 2020

Notes. 12% of overlap was reported between regular users of Cable, Satellite or Telco TV Subscriptions and Subscription Video Streaming Apps.

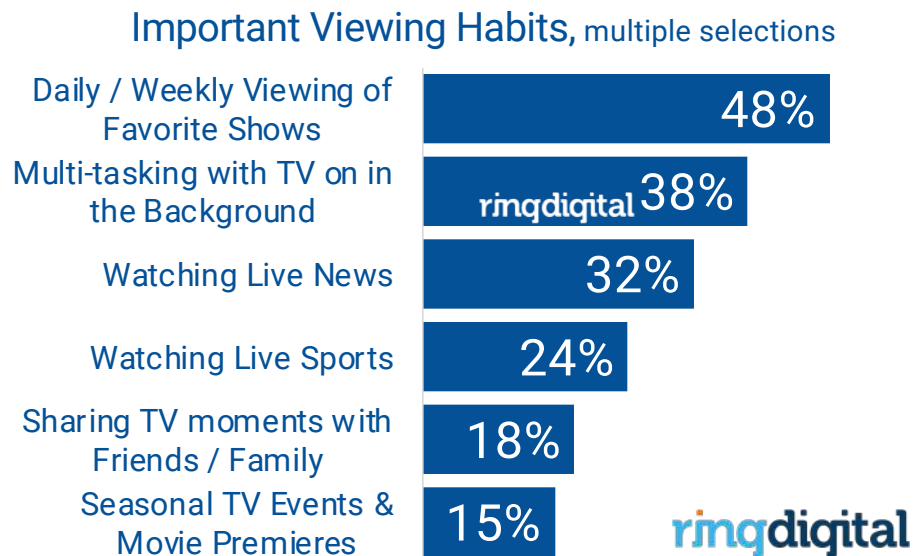
Regular Source(s) of Video / TV Viewing



1.2 Multitasking TV: A Strong 2nd place. *What if?*

Programmers won't like the idea but if subs love it, can operators monetize it?

Q: Which of the following video & TV viewing habits are most important to you?



38%: Multitasking with TV is a “most important” TV habit

18%: Sharing TV moments with friends/family “most important”

TV is many things to many people. Unique viewing modes support diverse value propositions. Users should be served with features and functions that delight, whatever their TV habits or economic utility. That's an opportunity for TV providers to differentiate.

Sample of 1,101 US Net Users, screened for 5 hours or more of video viewing weekly, Google Surveys, June 9 – 12 2020. Use caution interpreting Sports data during Covid.



1.3 TV Channels. Search. Remote Control.

Getting the basics right is still the most important job to do.

Three Takeaways at 50,000 Feet

TV Channels aren't dead. The basic channel program guide, still the bedrock of TV UX.

Search, not browse. Of course, search is key. But the low result for Content Browsing is worth a second look. Why? Poor execution? Something else? Inquiries for more research.

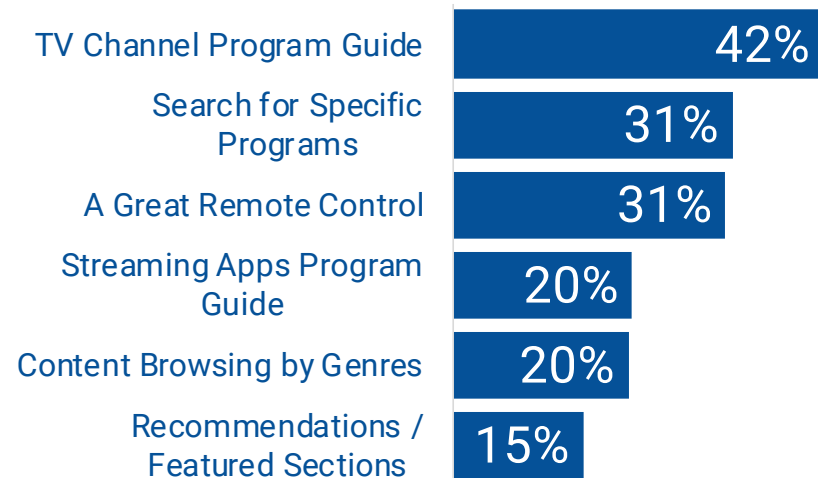
A Great Remote Control. An iconic TV innovation that still has relevance today.



For this question, consider the interface and program guide you use to find great content to watch.

Q: Which content navigation features are most important to you?

Important Content Navigation Features

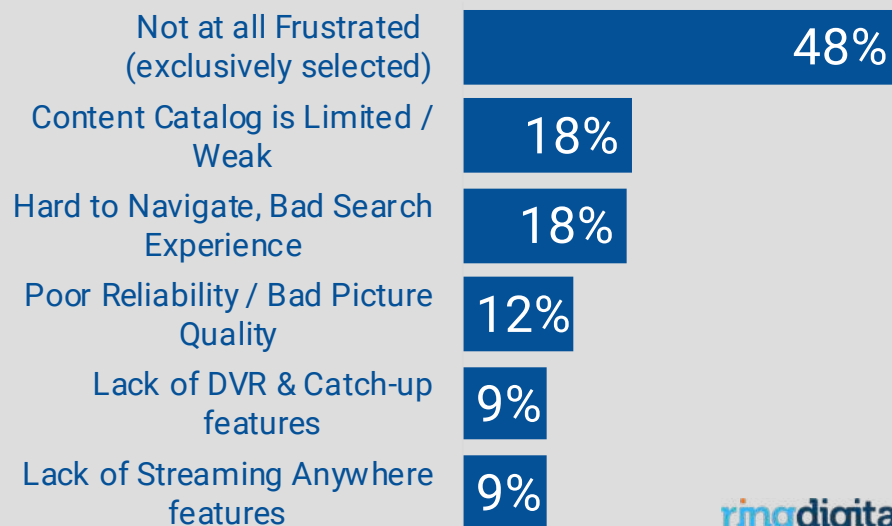


1.4 Amidst cord-cutting, improving C-Sat scores?

With disaffected subscribers leaving, is satisfaction improving?

Consider your regular source(s) of video / TV programming.
Q: Which aspects of this video / TV service are you most frustrated with?

Top Frustrations with TV



Is this a blip? Or a trend?

48% of respondents declined to complain about their TV service. The cross-tabs showed Cable, Satellite or Telco TV viewers were the **most satisfied cohort**, at 51%. (MoE +/-4%.) Next was Free Broadcast TV at 49%. (MoE +/-8%.)

This data surprised us. We dug into ACSI data, the industry standard for pay TV customer satisfaction benchmarks. 2020 brought higher customer satisfaction scores across major cable TV providers: Xfinity up 10.5%, Spectrum up 3.4%, Cox up 5.1%, and Optimum up 3.3%.

American Customer Satisfaction Index data: <https://bit.ly/2VhuNfe>

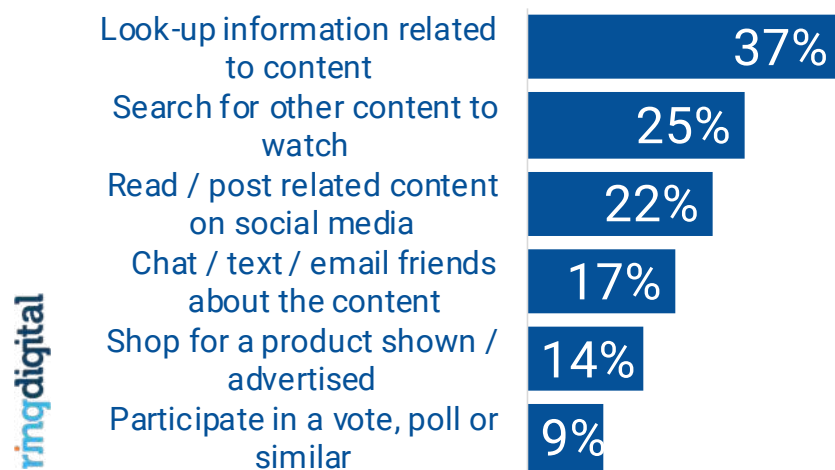


1.5 Two-screen Usage at 88%: Meeker, Nielsen

Top usage: Look up related content; find something else to watch; socialize.

Q: In what ways have you used a digital device to engage with content you were watching on TV?
(i.e. Mobile/tablet, laptop/computer, simultaneously w TV.)

Simultaneous Media Usage



Related Content, Top Use Case

| | |
|--|-----|
| Looking up information related to the TV content | 37% |
| Using the second screen as a TV Guide | 25% |
| TV-related Social Media Activity | 22% |

MoE +/- 2.5% for these selections

2.0 TV Viewers Yearning for Social

TV is personal; Social media is public; People yearning for water cooler TV.

Remember “watercooler TV”? Time-shifting, place-shifting & personalizing TV has made video viewing increasingly solitary. A 2017 study by Nielsen and Roku showed in-person co-viewing for OTT was 34% compared to 47% for traditional TV.

Then, Covid hit. **Do people want to co-view, while apart?** How interested are they in social or communal TV viewing? And what do they want from such an experience?

Part two examines the results of our Watch Together survey questions. Any behavioral data during a pandemic should be interpreted carefully. But given just how much change is afoot, it was well worth it to ask the questions.

<https://www.nielsen.com/us/en/insights/report/2017/co-viewing-on-ott-devices-similarities-and-differences/>

2.1 39% of Live Sports viewers are Interested

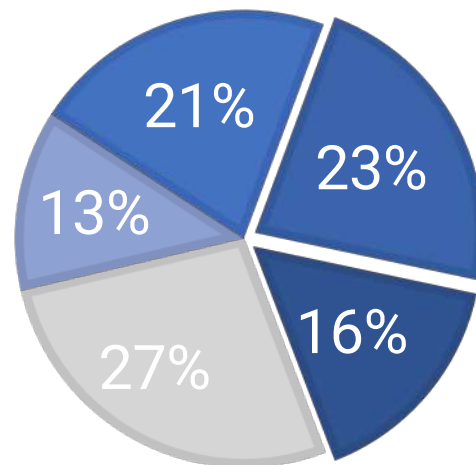
Stronger interest amongst certain cohorts, including Live Sports & TV Events



Q: What if you could watch TV with friends and family who are in different locations – and interact with them at the same time? (Any genre. Sports is an example.)

Level of Interest in the Concept
(clarifying example image shown)

1 = Not at all interested
1
2
3
4
5
5 = Very interested



Live Sports Viewers

Top Two Box

39%



Sample of 264 responses that selected Live Sports as most important TV habit. Margin of Error for this cross-tab is +/-6.0

2.2 26% of Video / TV viewers are Interested

A strong baseline top two box interest across the entire sample.



Q: What if you could watch TV with friends and family who are in different locations – and interact with them at the same time? (Any genre. Sports is an example.)

Level of Interest in the Concept
(clarifying example image shown)

1 = Not at all interested

1

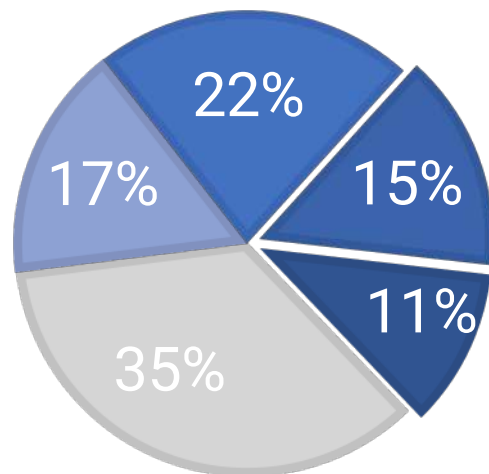
2

3

4

5

5 = Very interested



Yearning for Social

Top Two Box

26%

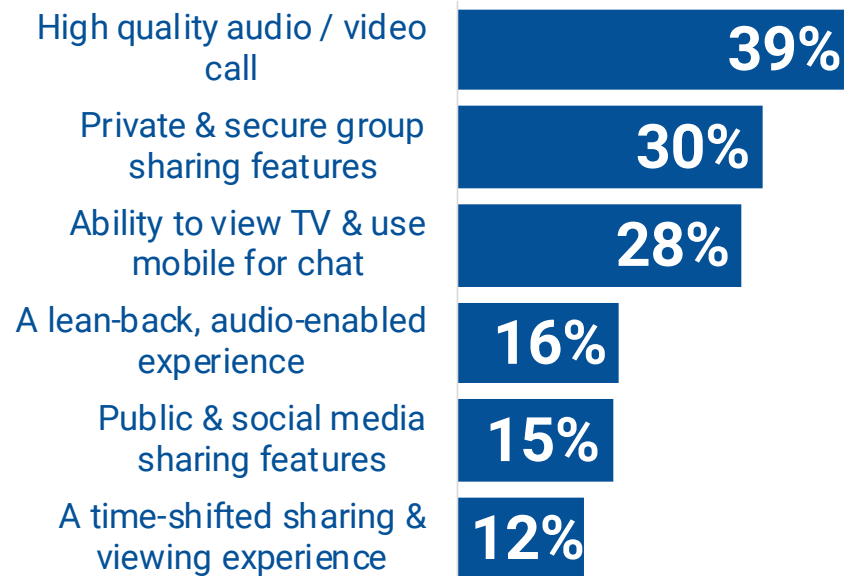


Amongst all 1,101 video & TV Viewers surveyed, all viewing habits. MoE +/-2.95

2.3 Social TV UX: Three Key Takeaways

It needs to work. Strong latent demand for Privacy. Two-screen is essential.

Q: Which of the following features are most interesting to you for this type of viewing?



Shared TV Experiences

Make sure it works. The basics, including high quality audio and video are job number one.

Privacy is hugely valued. Private and secure group sharing registered strong interest. And presumably.

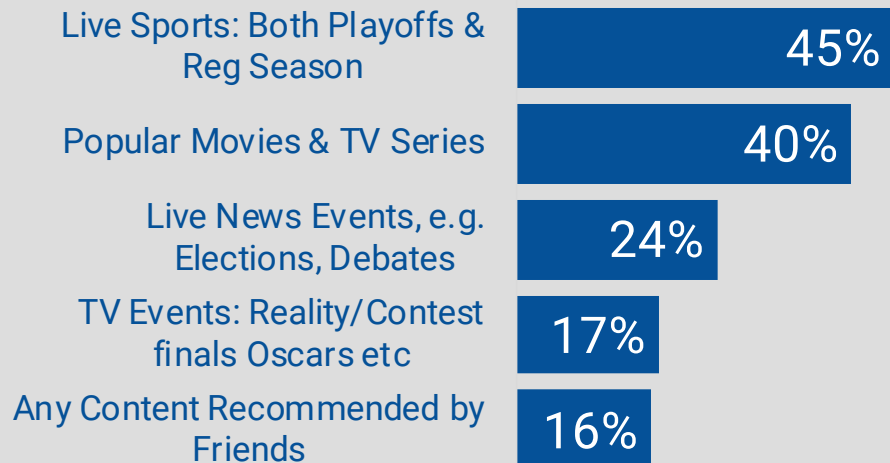
Two-screen comfort. Strong comfort with simultaneous device usage and two-screen UX.



2.4 Multi-genre Appeal: Live Sports, Movies & TV

Strong appeal across Sports, Movies and TV Series and Live News events.

Q: Which of the following content genres are most interesting to you for this type of social viewing?



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Notes. Sample size 1,101 complete responses. Highly viewed TV Events like the Oscars and Grammys are highly viewed and social, but relatively infrequent.

2.5 Regular Season, Big Games: A Social Edge

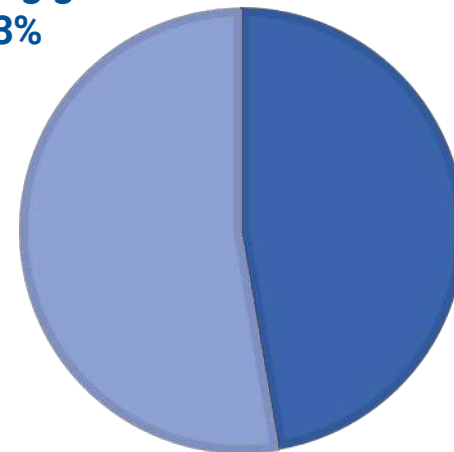
A positive reinforcement to a regular season habit is win-win engagement.

Social TV Oriented Content

Regular season insights. Big games and reunion rivalries provide particularly interesting shared TV viewing opportunities for particular social groups. For example, friends that may have met in college attending and watching NCAA sporting events but that have long since moved apart

Live Sports: Regular season, Big games
53%

Live Sports: Playoffs, Tourneys & Champ's
47%



3.0 Cheering and Chatting Resonate Best

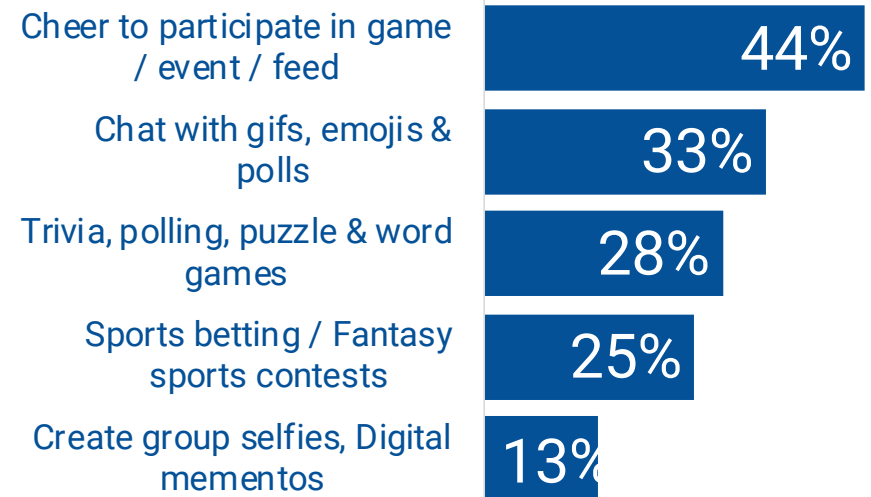
For this question, we focused on 708 respondents with interest in live sports.

Cheer up. In these difficult times, cheering has positively social meme potential.

Chat. Another great word helping to define a new and powerful streaming conversational medium.

Gamification. Combining Trivia games 28% and Sports betting 25% into 'Gamification' yields 53%.

Q: Imagine a 'Watch Party' experience for your favorite sport event(s), e.g. Playoffs, NCAA Madness, Football Bowls. Which interactive features are you most interested in?



Live Webinar: Watch Together, While Apart

Ring Digital is proud to bring Minerva and friends together for a special event!

Who: Brian Ring will host featured speakers from Minerva Networks, as well as other VIP guests.

What: Data, demos and discussion about how to build a better, more social TV experience. We will host an interactive session with plenty of Q&A covering “Watch Together” from every angle.

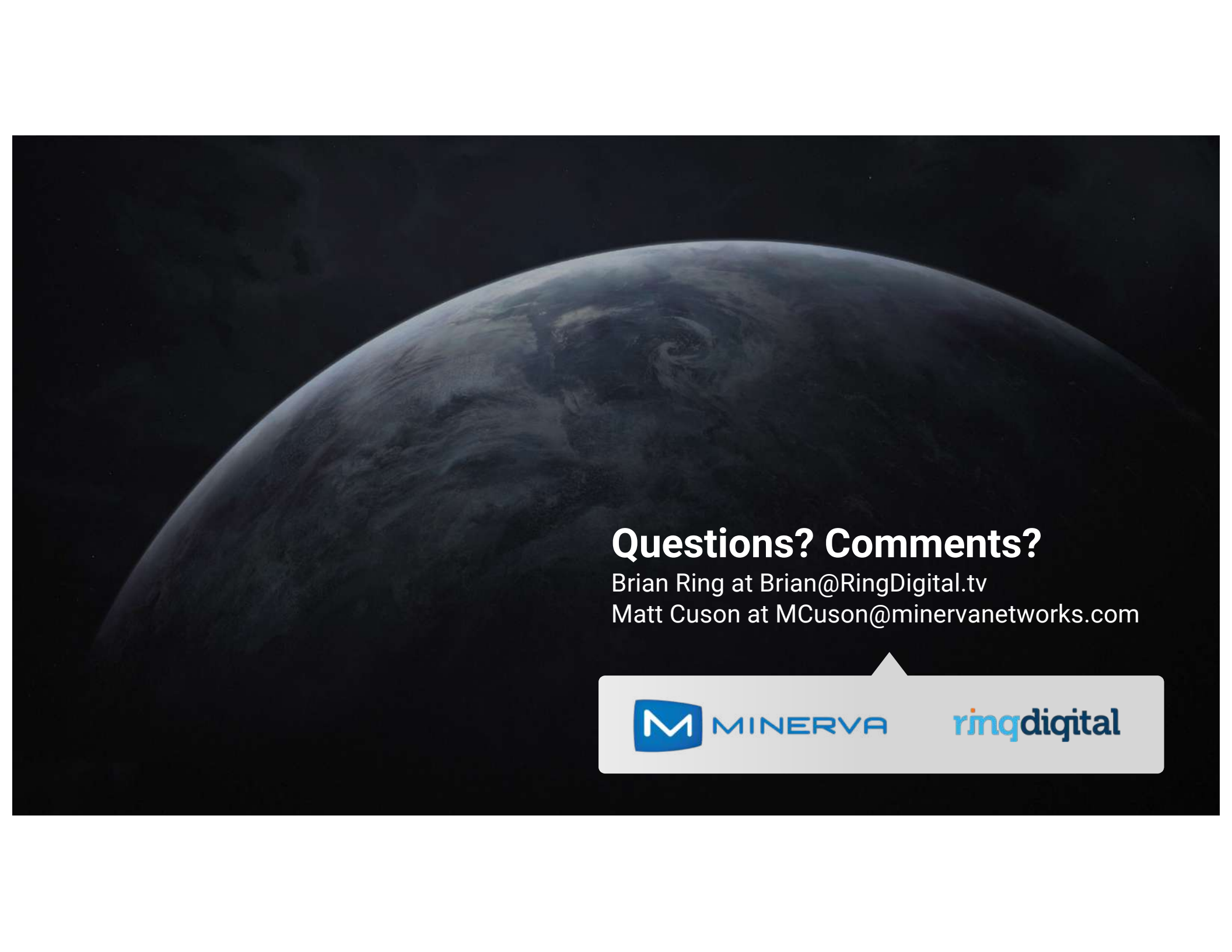
When: July 23, 11am PT

Where: Zoom. Register: [Bit.ly/31rYjpF](https://bit.ly/31rYjpF)

Why: Because TV operators can help local sports teams fill the content, economic and fandom gap resulting from Covid-19. We'll explain.

Register for the webinar
Watch Together While Apart:
Sports TV Fandom, Covid-style
at this link below

<https://bit.ly/31eYjpF>



Questions? Comments?

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