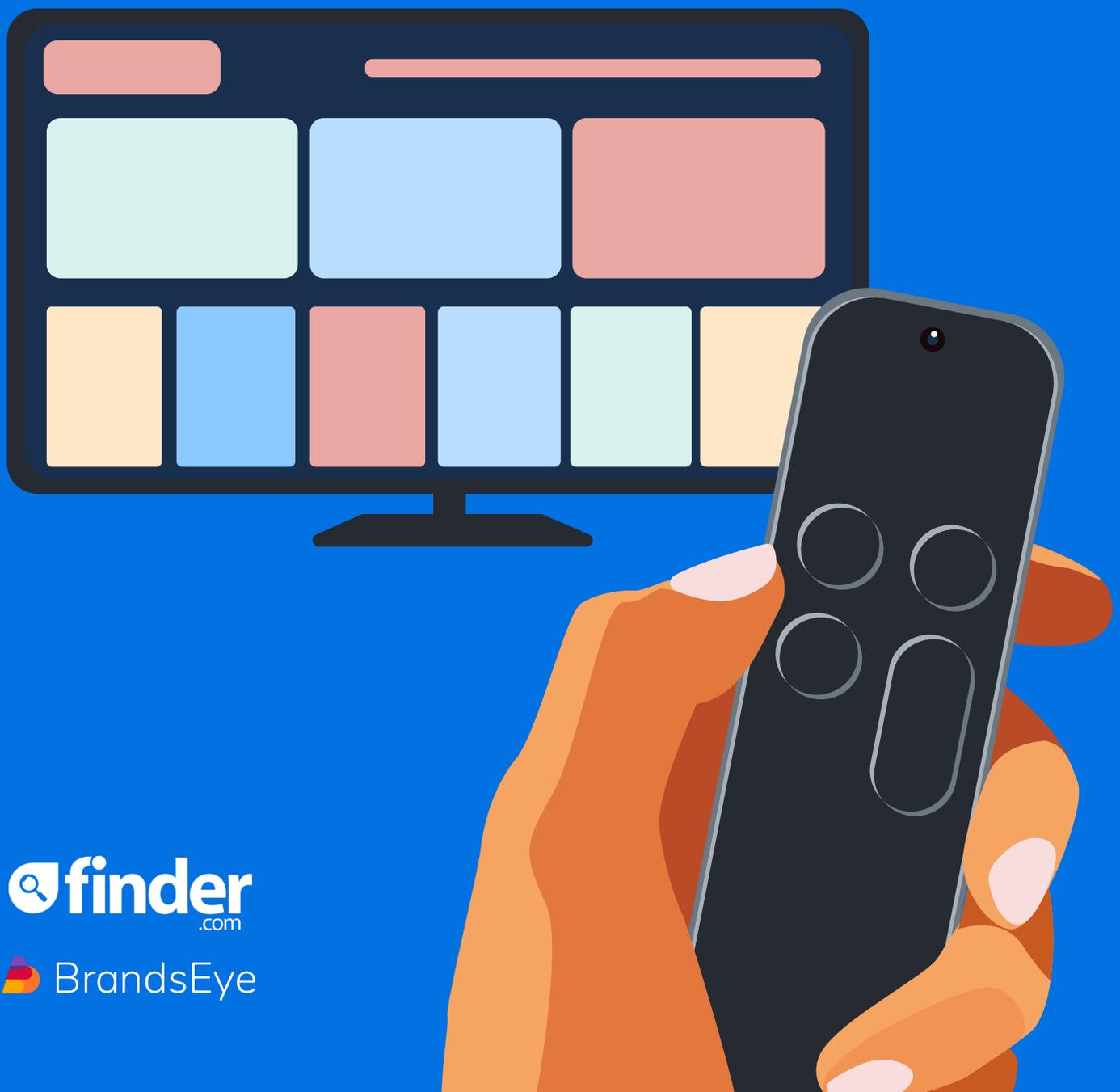


Lockdown and chill: How streaming won 2020

*An analysis of subscription video-on-demand services and
broadcasters in 2020, and the shows that set social media alight.*



 **finder**
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 BrandsEye

The extraordinary success of hit shows has driven TV streaming services into the UK mainstream in recent years, and traditional broadcasters are fighting for the nation's eyeballs like never before. Controversy has also played a part - *The Crown* in 2020 being a recent example.

An increasing number of Brits use subscription video-on-demand (SVoD) services - new data from Finder shows that 4 in 5 people in the UK (78%) have used at least one of these platforms in 2020. And this is a trend that looks set to stick - 30.4 million Brits (58%) are thinking about signing up to an additional streaming service in the next 12 months.

The fight for attention is happening on multiple platforms - and not just those where the shows are available to view. Social media is a key battleground where 2020 has seen victories for traditional broadcasters as well as the SVoD challengers.

Working with the specialist social media analyst BrandsEye, which trawled through millions of social media conversations, Finder has compiled a list of the top 10 most talked about TV shows of 2020; the top 5 are dominated by the BBC, ITV and Channel 4.

But with a dip in viewing figures since lockdown and a wave of older generations turning towards SVoD services, what is 2021 likely to hold for the incumbents?

An issue that old and new services are both facing is the prevalence of illegal streaming. Based on our latest survey, at least 5.8 million Brits watched content illegally in 2020. So how is the industry addressing the problem?

In this paper, we've published our new research and exclusive data from BrandsEye, analysed how the pandemic has affected TV streaming habits across generations during lockdown and beyond, and gathered expert views on what lies ahead for the sector in 2021.

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About Finder

Appetite for TV streaming in the UK has risen sharply over the last decade. The sector includes traditional broadcasters' services, such as BBC iPlayer, and paid-for SVoDs such as Netflix. Finder polled 2,000 Brits in December 2020; 4 in 5 (78%) had used at least one paid-for SVoD service in the past year, up from 76% in June. We analyse the rise of Netflix on p4, but here we cover the other SVoDs.

Free players	SVoD
BBC iPlayer	Netflix
ITV Player	Amazon Prime Video
All 4	Disney+
Demand 5	Sky Go
	NOW TV

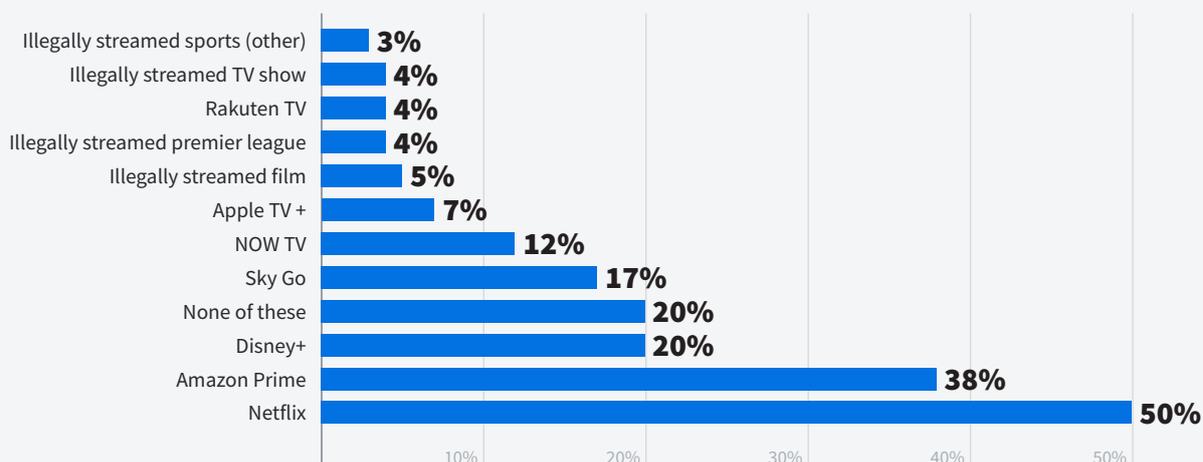
Amazon Prime Video. Amazon's video platform launched in 2006 in the US, but took off in 2011 in the UK when Prime members got access to over 5,000 movies and shows as part of their existing subscription. In 2020, 38% of Brits streamed content on Amazon Prime Video, and the service was most popular with generation X (44% of those born between 1965 and 1980 said they'd used it, in our poll). Also in 2020, the Prime Video app became available to view on Sky Q, Sky Ticket and NOW TV devices, giving Sky and Prime paying members a more seamless experience.

Disney+. This relative newcomer boasts remarkable growth in 2020. Having launched in the UK on 24 March, 2020, the service's big-name draws - including Pixar and Marvel titles, and the *Star Wars* spin-off series *The Mandalorian* - helped it to top 86.8 million subscribers worldwide in December. The brand's initial goal was to reach 90 million subscriptions by 2024, but Disney+ is already a significant challenger. In our poll, 20% had used the platform in 2020, and it was most popular among generation Z (40% of those born since 1996 said they'd used it).

Sky Go. The Sky Go app launched in 2006 and is included in Sky TV subscriptions. It allows users to watch live and on-demand Sky content, and 17% of Brits told us they'd used it. Unlike most other SVoD services, Sky Go is equally popular across generations, reflecting the broad range in the mix of content available.

NOW TV. Another subscription service from Sky, NOW TV launched in the UK in 2012, featuring content released on Sky channels, including *The Undoing* via Sky Atlantic and Premier League football via Sky Sports. We found that 12% of Brits had used it to stream in 2020.

Brits' use of streaming services, December 2019-2020



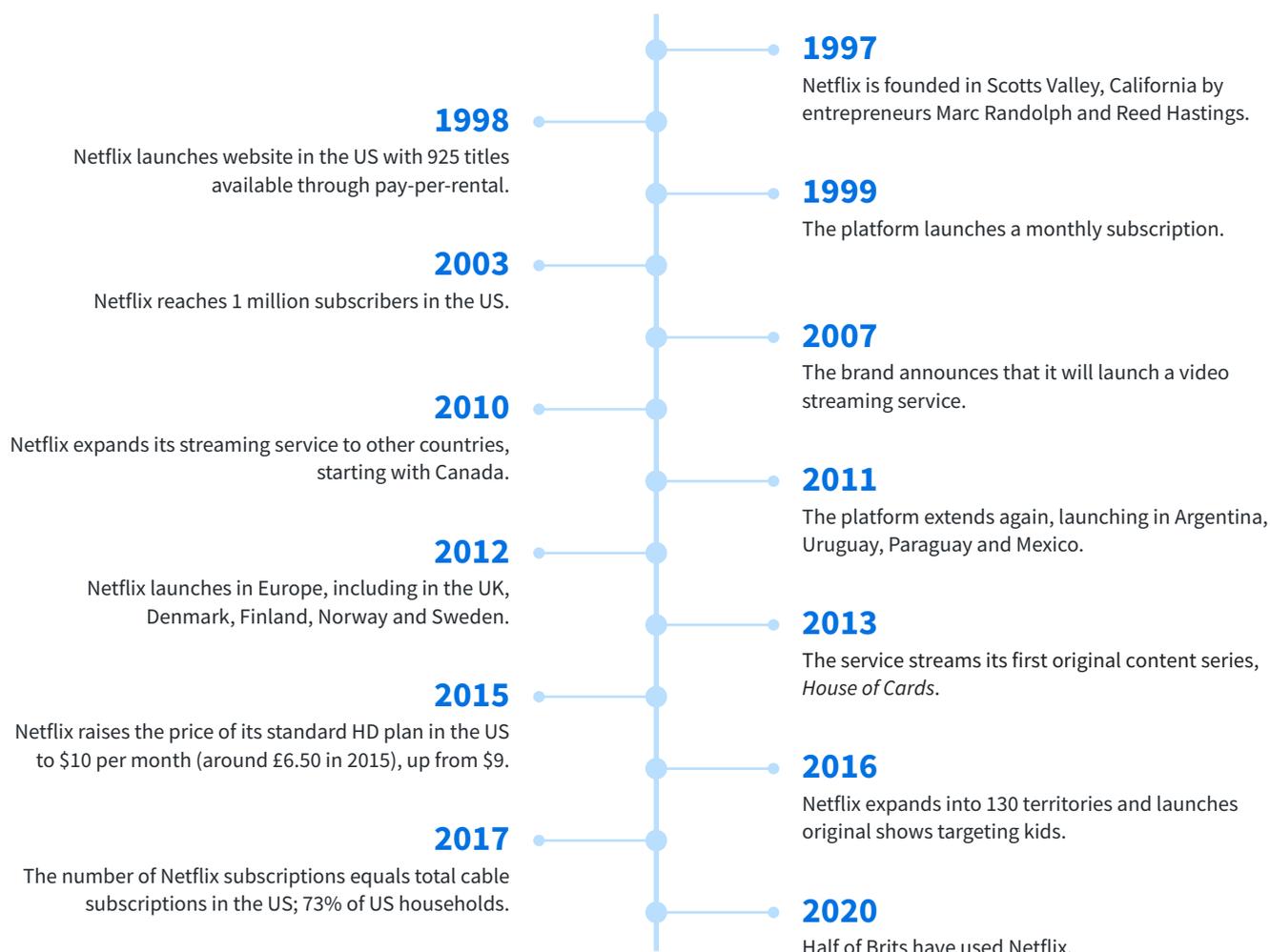
Source: Finder survey, December 2020



Netflix

From relatively humble beginnings as a film rental service based in California, Netflix has grown into the world's most popular streaming service, boasting nearly 200 million paid members.

Half of those in our poll had used it, and its popularity cuts across generations - 58% of generation X, followed by 55% of millennials, 54% of generation Z, 42% of baby boomers and 33% of the silent generation had watched Netflix. But how did it achieve this domination?



Half of British adults have used **Netflix** in 2020



Source: Finder survey, Dec 2020

Households increased their watching time during lockdown, and SVoD services grew faster than traditional broadcasters - a trend that looks set to continue in 2021. During April 2020, Brits spent an average of 6 hours 25 minutes per person, per day watching content. That's 1.5 hours more than the average figure for 2019, according to data from the regulator, Ofcom, published in August.

Much of this can be attributed to viewers tuning into the government's daily coronavirus briefings, but SVoD platforms like Netflix and Disney+ held Brits' attention for an average of 1 hour 11 minutes a day – 37 minutes more than 2019's figure. And while the boost in audience numbers was short-lived for broadcasters, SVoD services retained much of their lockdown uplift - viewing hours were up 71% year on year in the last week of June, after restrictions had been eased.

New older viewers

The SVoD platforms enticed consumers who had never streamed before, thanks to “highly personalised experiences” and “richer content libraries” than their broadcaster counterparts, says Catherine Johnson, a professor in media and communication at the University of Huddersfield.

According to a study carried out by her team in May 2020, older participants were far more likely than other age groups to have discovered SVoD during lockdown and added it to their daily routine. One 68-year-old participant said: “[Lockdown has] meant that really, we've looked more at using the catch-up programmes. We have actually got Netflix now, which we didn't have before [...] And my son keeps saying we ought to get Amazon Prime.”

Data from Ofcom reflects this - nearly a third (32%) of the 12 million adults who accessed a new streaming subscription in the spring lockdown were aged 55-64, while 15% were 64+.

This shift looks set to stay: Finder data shows that 42% of baby boomers (born 1946-1964) are considering signing up to a streaming platform in the next 12 months.

“Given the very positive experiences that our participants had with SVoD in lockdown, it seems likely that it will remain an important part of their habitual TV viewing,” adds Professor Johnson.

The rise of Disney+

The spring lockdown also intensified competition within SVoD, with Disney+ the stand-out performer. The platform's subscriber numbers topped NOW TV's during the period, to make it the UK's third most popular SVoD service, according to Ofcom. A further 12% of Brits are considering signing up to Disney+ in the next 12 months, the latest Finder survey shows.

Ben Travers, TV critic on the Very Good TV Podcast from film industry site Indiewire, puts the rapid success of the platform down to its strategically amassed intellectual property.

“Long ago Disney acquired a variety of legacy brands with plans to expand. More Star Wars movies, more Pixar movies, more Marvel movies, and even more from Fox, be it huge TV shows like *The Simpsons* or film franchises like *Aliens* – and then there's the Disney classics.

“All of these brands have been beloved for decades, if not longer, and many of them are family-friendly, so a wide demographic of subscribers are all willing and eager to pay to access these movies and shows,” he says.

Disney+ also tapped into the power of the meme, with a gremlin officially called Grogu, but widely known as Baby Yoda. The lovable Zen master was a piece of marketing genius that appealed to fans of Star Wars, Disney and just cute animal GIFs. There have been more than 1.6 million posts about #BabyYoda on Instagram as of December 2020, and @baby.yoda.memes_ has become one of the more widely followed accounts on the platform (43.7K followers), devoted to countless memes of the little green character. Demand for Baby Yoda merchandise is booming - replica dolls, mugs, even Pandora charms are all available.

Disney+ also benefits from being considered as a supplementary service. Unlike any other SVoD platform, the vast majority (95%) of members also subscribe to one or both of Netflix and Amazon Prime Video, rather than streaming on Disney+ exclusively, according to Ofcom data.

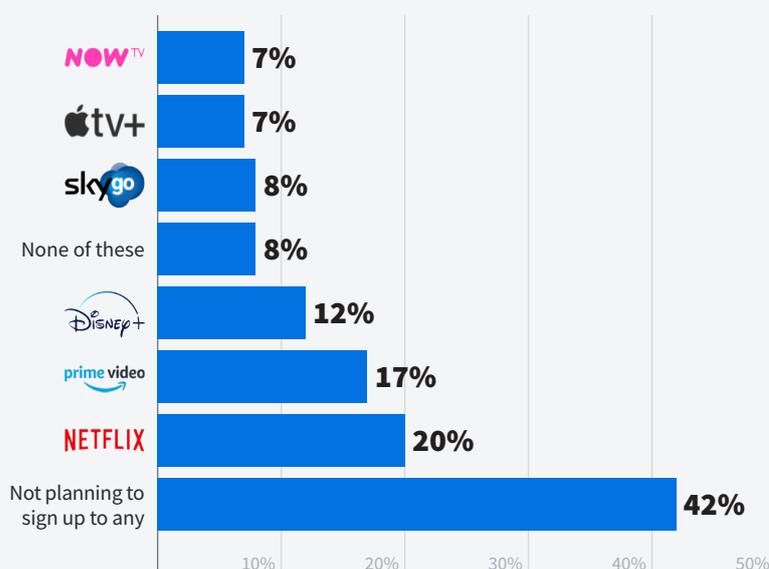
Premium video-on-demand

The spring lockdown hugely disrupted the distribution plans of film studios - several blockbusters were postponed until 2021, and others were released as premium video-on-demand (PVoD) content, boosting the sector further.

Universal Pictures made *Trolls World Tour* available on Google Play and iTunes, and the live-action remake of *Mulan* skipped the cinema for exclusive release on Disney+. Both films were priced higher than a single cinema ticket - Disney+ offered *Mulan* for a one-off £19.99, while a 48-hour rental of *Trolls World Tour* cost £15.99. This is set to continue: Warner Bros announced it would release every 2021 film, including *The Matrix 4*, via American SVoD platform HBO Max on the same day each movie debuts in the cinema. Disney has also revealed that two of the brand’s upcoming blockbusters, *Peter Pan & Wendy* and *Pinocchio*, will be released directly on Disney+, totally skipping cinemas.

Liz Shannon Miller, senior TV editor at American entertainment website Collider, believes there’s still hope for cinemas: “I don’t think the theatrical window is dead (especially given the industry’s virulent reaction to the HBO Max announcement...), but I do think it’ll change the conversation around release strategies.”

SVoDs that Brits are considering joining in 2021



Source: Finder survey, December 2020



While 2020 has been the year of the streaming platform, traditional broadcasters have generated an impressive swathe of free publicity for their content.

Finder collaborated with the social media analyst BrandsEye to trawl nearly 2.3 million UK conversations on Twitter, talking about 65 of the UK's most popular TV shows from 7 streaming platforms. The research covered the 12 months to 1 December, 2020.

Of the top 10 most discussed shows, 6 were from the traditional broadcasters, including the BBC, ITV and Channel 4. The only SVoD show to make the top five was *The Mandalorian*, from Disney+, while the other four were shows featuring an element of competition which sparked a huge volume of conversations on social media. Top was *Love Island*, which generated almost 10 times more posts than the second most popular show, *I'm A Celebrity... Get Me Out Of Here*.

1. **Love Island** 1,099, 301 mentions

ITV's hit reality show *Love Island* returned to screens in January, with its first winter edition, for series seven.

This show accounted for the highest conversation volume on Twitter of all shows aired in 2020 by far, accounting for nearly half of all mentions in the research.

Most comments touched on the relationships between couples but Brits also aired their concerns about the lack of inclusivity and LGBTQ+ representation.

Some press coverage - including that from *The Independent* and *Metro* - also criticised the show for the lack of LGBT people; one commentator called it "irresponsible."

This contentious topic would resurface later in 2020, when the 18th series of *Strictly Come Dancing* launched in October with its first same-sex couple (we cover this on p8).

The premature death of the former *Love Island* presenter Caroline Flack in February sparked a huge reaction. "Caroline Flack" was searched for on Google more times than "coronavirus symptoms" in 2020, Google has revealed.

Hundreds of Brits took to Twitter to express their condolences, while others criticised internet trolls.

Top 10 on Twitter

Show	Volume	Engagement
Love Island	1,099,301	210,563
I'm a Celebrity	136,575	23,852
Strictly Come Dancing	133,925	31,537
The Mandalorian	109,761	6,663
GBBO	98,180	73,945
Britain's Got Talent	92,130	37,893
Tiger King	80,172	6,523
The Witcher	64,064	4,616
Killing Eve	61,657	4,278
Money Heist	52,421	4,077



Source: Brandseye

2. *I'm A Celebrity... Get Me Out Of Here!* 136,575 mentions

The British survival TV show returned for its 20th anniversary season on ITV in November, set in a Welsh castle rather than the Australian jungle.

Posts generated 23,852 reshares and replies, and feelings were mixed. Positive conversations included fans sharing memes - for example the *Coronation Street* actress Beverley Callard during a Bushtucker

Trial. But some authors described the show as “vile” and accused the producers of “animal cruelty.” This was sparked by Twitter comments from the animal welfare organisation the RSPCA.



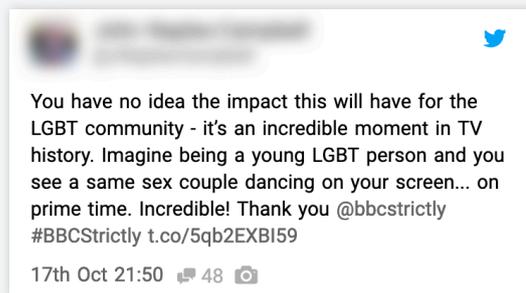
Source: Brandseye

The contest also drew criticism for failing to relate to viewers’ lockdown experiences - fans felt they were being “taunted” as campmates got a night out at a makeshift pub while the rest of the UK was in its second lockdown.

3. *Strictly Come Dancing* 133,925 mentions

BBC One’s ballroom dancing contest excited viewers when it returned for the 18th anniversary series in October. *Strictly* heavily promotes its social channels during the show, and these efforts were rewarded: it topped the volume and engagement rankings for all shows aired on BBC iPlayer in 2020.

The show featured its first same-sex couple: Olympic boxing gold medallist Nicola Adams was paired with dancer Katya Jones. *Strictly* achieved its best opening ratings for three years, attracting peak viewing figures of 9 million Brits on the first Saturday evening, with an audience share of 42.2%, according to BBC data. This was reflected in the sentiment of online posts - “at last” and “about time” were popular comments from those celebrating the news.



Source: Brandseye

4. *The Mandalorian* 109,761 mentions

After launching in the US in November 2019, Disney+ debuted in the UK in March, releasing its most popular show to date, the *Star Wars* spin-off series *The Mandalorian*.

Posts generated an impressive 6,663 reshares and replies. The show’s popularity was driven by *Star Wars* fans, who found it reminiscent of the original George Lucas trilogy. However, the standout topic of conversation was Baby Yoda.

Twitter users celebrated the character by sharing memes of him swaddled in oversized robes, eating a frog and holding a cup.



Source: Brandseye

5. *The Great British Bake Off* 98,180 mentions

The 11th series of *The Great British Bake Off* (GBBO) topped the charts for Channel 4 after launching in September. Social posts generated 73,945 reshares and replies - most of which were sparked by regular tweets from GBBO's verified account.

A major theme among posts was a parody of prime minister Boris Johnson by show co-host Matt Lucas. This alone drove over 4,000 engagements, with huge numbers of *Bake Off* fans commenting that the actor had "nailed" the impression. But not everyone loved it: Ofcom revealed it had received over 200 complaints about the sketch.

Below, we show Twitter posts and engagement, by show. *Tiger King* was credited with giving Netflix a boost in 2020.



Source: Brandseye

The *Tiger King* dividend:

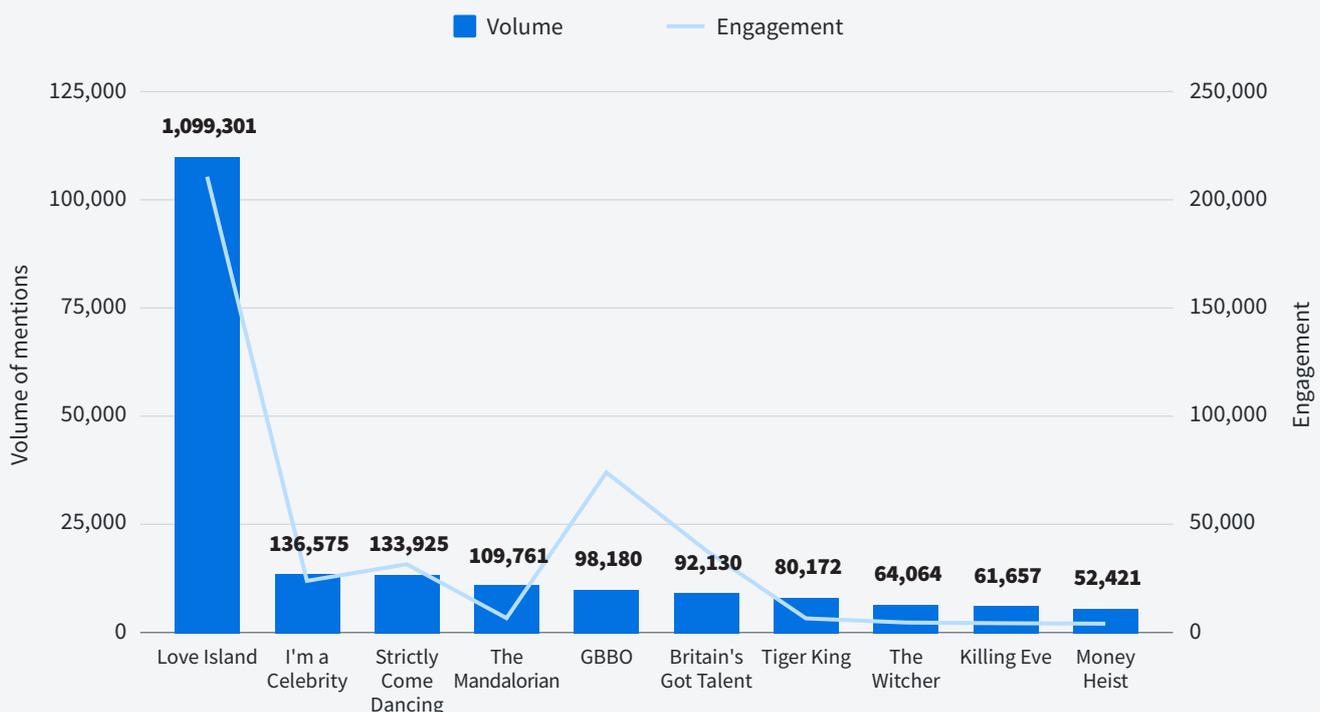
15.8m new Netflix global subs in **spring 2020**

64m globally watched *Tiger King*, launched 20 March

80,000 UK tweets about the show

finder.com
Source: Finder

Most discussed shows by volume, year to December 2020



Source: BrandsEye, Dec 1, 2019-Dec 1, 2020

finder.com

Shifts in behaviour triggered by the pandemic have added to challenges - and opportunities - for traditional broadcasters and SVoD services. There are a few perennial challenges that the whole industry faces, too.

Illegal streaming

Despite an ever-growing list of legitimate options, Brits are still bypassing legal platforms - 5.8 million viewers (11%) streamed illegally in the year to December, up from 3.1 million Brits (6%) who admitted to doing so in June, according to the latest Finder survey.

5.8 million
viewers (11%)
streamed **illegally**
during **2020**



Source: Finder survey,
December 2020



Film piracy is the biggest category - around 2.6 million Brits - followed by TV programmes and Premier League football matches, streamed illegally by an estimated 2 million Brits each.

The Federation Against Copyright Theft (FACT), the trade body set up to protect film and TV intellectual property, revealed a spike in illegal streaming during lockdown.

“In May, our scanning team removed more than double the volume of film links and illegal streams [that were live] in April, compared to February,” says FACT CEO Kieron Sharp.

Aaron McAllister, TV publisher at Finder, says: “People want shows the minute they are released and the longer a country has to wait for a new season or movie, the more likely it is consumers are going to go looking for alternative ways to watch them. Services need to do better with the timing of worldwide releases.”

One solution is a broader range of subscription models and prices. DAZN, a sports streaming service that launched in Europe in 2016, has recently begun offering boxing coverage in the UK. “DAZN is available in the UK for just £1.99 per month and creates a low barrier to entry for consumers. It’s far cheaper than the traditional ways of having to pay for boxing pay-per-view, which helps to discourage illegal streams,” adds McAllister.

A crowded market

While the largest SVoD players are Netflix and Amazon Prime Video, Finder research found that 30.4 million Brits (58%) are considering signing up to a streaming service in 2021, leaving plenty of scope for their competitors.

Meanwhile, traditional broadcasters are innovating - with new services such as the BBC/ITV collaboration BritBox - and will be fighting to keep their share. One tactic is to deepen the appeal to younger audiences through interactive content - Channel 4 partnered with Snap Inc. (parent of Snapchat) in June 2020 to stream a collection of mobile-episode edits of its series *Hollyoaks*. Snapchatters were able to create their own cliff-hanger ending, with an augmented reality lens experience including the *Hollyoaks* theme tune and end credits.

Channel 4's *Celebs Go Dating*, *Don't Tell the Bride* and *Tattoo Fixers* have followed in the same vein, reaching over 19 million unique viewers on Snapchat, most of whom were aged 13-24, according to the broadcaster's data.

The future of SVoD services

SVoD services have enjoyed phenomenal growth in 2020, but one of the biggest questions is whether the binge-watching model, which requires a substantial pipeline of content to keep viewers engaged, can be maintained. For example, binge pioneer Netflix allows users to consume thousands of titles in one hit, including multiple series of costly original content such as *House of Cards* and *The Crown*.

Professor Catherine Johnson, of the University of Huddersfield, says: "Until recently, Netflix has been able to benefit from buying the secondary rights to content from a wider range of other providers, from US networks to UK public service broadcasters.

"Moving forward, this could get harder. Disney has taken some of its content off Netflix, at least in the short term, and made it available exclusively on Disney+. BBC, ITV and Channel 4 may also decide to license their content to BritBox, rather than to Netflix. If Netflix has to increasingly rely on filling its catalogue with original content, this could get pretty expensive," she adds.

In a bid to ward off competitors, Netflix recently announced a 50% increase in its UK budget for 2020. Netflix, as well as other SVoD platforms, will need to work harder to reach new subscribers, and in the midst of an economic downturn, this won't be easy.

"I suspect that Netflix will look to increase its subscriber numbers in those overseas markets where it has had less take-up. Another option which it is already exploring is to integrate its subscriptions with other services. We've seen this with Sky now enabling consumers to include a Netflix subscription in their pay-TV package," says Professor Johnson.



30.4 million Brits
(58%) are considering **signing up**
to another **streaming service**
in 2021



Catherine Johnson, professor in media and communication, University of Huddersfield

“Netflix is in a very strong position in having a first-to-market advantage and a transnational scale not currently matched by any other SVoD provider. Looking forward, I suspect the picture will continue to be complex. Some content will remain exclusive to specific SVoD services, but there will still be a vibrant market in the sale of rights to content, simply because it is unlikely that any one provider will be able to afford to make enough content to fill their catalogues.”



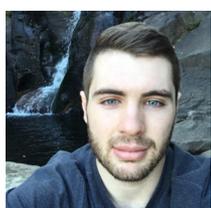
Liz Shannon Miller, senior TV editor, Collider

“I think that growth [of SVoD] is just part of the natural evolution of the industry that's been happening, though of course exaggerated by the fact that other entertainment venues were no longer available. There are lots of question marks — like how the new Fox fits into that equation, and if Disney+ is poised to evolve and incorporate ABC programming and/or Hulu — but a vaccine won't change how streaming is shifting our viewing patterns away from traditional broadcast.”



Ben Travers, TV critic, Indiewire's Very Good TV Podcast

“Given the high priority placed on streaming services by a majority of companies, as well as the continued uptick in subscribers to the newest streaming services, it's safe to say growth will continue in 2021 and beyond. Disney+ has seen enormous success, and has upped its subscriber projections accordingly. HBO Max has committed to debuting Warner Bros' full 2021 film slate on streaming, which shows just how committed WarnerMedia is to the service.”



Aaron McAllister, TV publisher, FINDER

“SVoD services are here to stay. In the last year alone, Disney+ and Apple TV+ have penetrated the global market. We've also seen older viewers streaming during lockdown, many of whom had never done so before. Reaching these non-users was one of the biggest obstacles facing SVoD services, and the pandemic has helped to solve that. On the other hand, free streaming services like BBC iPlayer will need to pump more resources into new content to compete for viewers in an incredibly saturated market.”

Conclusion

The spring 2020 lockdown changed UK viewing habits and gave multiple subscription services an opportunity to gather more members, most notably first-time streamers from older generations. And this is a trend that looks set to stick - 30.4 million Brits are considering signing up to an additional platform in the next 12 months, which includes 42% of baby boomers.

But amid an economic downturn, SVoD platforms will likely need to innovate their charging models if they are to persuade more Brits to part with their money. And broadcast competitors will no doubt look to build on the victories achieved on social media, and other lessons learned over the last 12 months, to mount challenges in 2021.

About Finder

Finder is a personal finance website which helps consumers compare products online so they can make better-informed decisions. Consumers can visit the website to compare utilities, mortgages, credit cards, insurance products, shopping voucher codes, and so much more before choosing the option that best suits their needs.

finder.com/uk launched in the UK in February 2017 and is privately owned and self-funded by two Australian entrepreneurs – Fred Schebesta and Frank Restuccia – who successfully grew finder.com.au to be Australia's most visited personal finance website (Source: Experian Hitwise).

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