

# Tune In: The Impact of Binge-Viewing

July, 2014



# What is binge-viewing?



Binge-viewing, or binge-watching, is a **growing pop cultural phenomenon**, whereby people watch multiple episodes of a TV program in one sitting



While there is **no single definition** of what constitutes a binge-viewer, the term 'binge-viewing' has been around **since 1990** with the **introduction of DVD sets and TV marathons**<sup>1</sup>



**Binge-viewing reached a new level of recognition in 2013** as Netflix and other video streaming services not only provided opportunities to watch multiple episodes of various TV series, but also offered original content<sup>1</sup>

## Sources:

1. The Atlantic, When, Exactly, Does Watching a Lot of Netflix Become a 'Binge?', February 2014

# Why is binge-viewing important?

**49%**

of U.S. households have at least one **television set connected to the Internet** via a video game system, Blu-ray player, smart TV set, and/or stand-alone device (like Roku, Apple TV, or Google Chromecast) – up from 24% in 2012<sup>1</sup>

**76%**

of TV streamers say watching **several episodes** of a great TV show is a **welcome escape** from their busy lives<sup>2</sup>

**47%**

of U.S. households subscribe to **Netflix, Amazon Prime and/or Hulu Plus services**<sup>1</sup>

**31%**

of adults **watch video on non-TV devices** (including computers and mobile devices) on a **daily** basis (up from 18% in 2012)<sup>1</sup>

**90%**

of US households pay for TV, but **4.7%** of all **subscribers are estimated to 'cut the cord'**<sup>3</sup>

## Sources:

1. Leichtman Research Group, Press Release, June 2014
2. Netflix: Binge-watching Is the New Normal for TV Streamers, December 2013
3. The New York Times, Ready to Cut the Cords?, April 2013

# Understanding binge-viewing

Annalect Primary Research & Insights explored binge-viewing with the following questions in mind:

1. How familiar are TV viewers with the phenomenon of binge-viewing?
2. Who are binge-viewers and what are their behaviors, attitudes and perceptions regarding binge-viewing?
3. What are TV viewers' (binge-viewers and non-binge-viewers) attitudes towards advertising?

## Methodology

- ✓ National online survey among A18+
- ✓ Fieldwork conducted in May, 2014
- ✓ 1,307 respondents who spend 5 or more hours a week watching televised content on any device
  - 826 binge-viewers (watch **three or more episodes** of the **same TV show** in **one sitting**)
  - 481 non-binge viewers (do not watch **three or more episodes** of the **same TV show** in **one sitting**)
- ✓ Respondents are representative of TV viewers based on key demographics including age, gender, race, ethnicity, and region

# While half of all TV viewers have heard of the term 'binge-viewing', nearly two-thirds are, in fact, binge-viewers\*

\*Annalect's proprietary study defines 'binge-viewing' as watching three or more episodes of the same TV show in one sitting

Among U.S. TV viewers (A18+)...

**63%**

... are binge-viewers\*

**55%**

... heard of terms 'binge-watching' or 'binge-viewing'

**30%**

... self-identify as 'binge-viewers'

I agree

Binge-viewers are more likely<sup>1</sup> to be:



**Female**

(67% vs. 59% male)

**Millennial**

(80% vs. 68% Gen Xer vs. 49% Boomer)

**African American**

(78% vs. 61% Caucasian)

**Hispanic**

(72% vs. 62% non-Hispanic)

**From the South**

(69% vs. 56% Midwest vs. 61% West vs. 64% Northeast<sup>2</sup>)



Base: TV viewers (n=1307); binge-viewers (n=826)

Q: In the past year, how many episodes of the same TV show have you typically watched in one sitting?

Q: Have you ever heard of the terms "binge-watching" or "binge-viewing"?

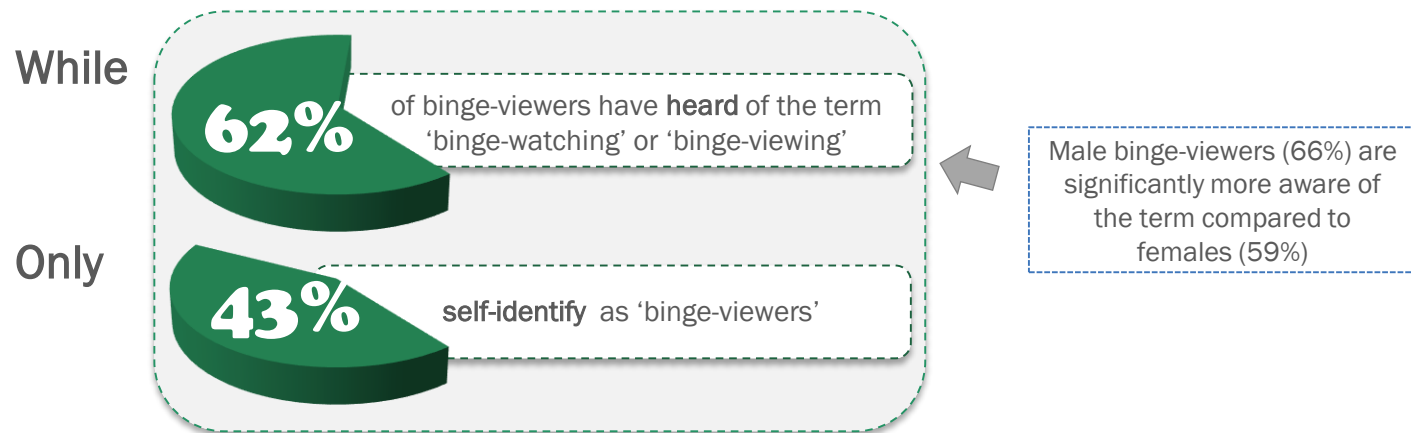
Q: Would you consider yourself to be a binge-viewer/binge-watcher?

<sup>1</sup> Statistically significant difference vs. counterpart at 95% confidence interval

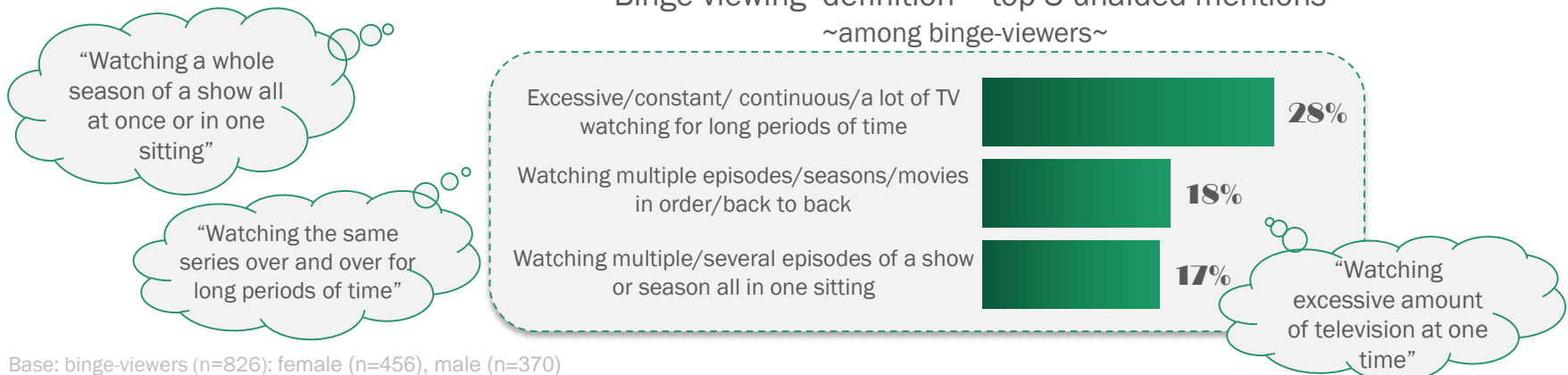
<sup>2</sup> Directional difference

# Of binge-viewers, less than half consider themselves to be bingers

This is likely because they think that it takes watching more than three episodes of a single TV show in one sitting to be a binge-viewer



## 'Binge-viewing' definition – top 3 unaided mentions ~among binge-viewers~



Base: binge-viewers (n=826): female (n=456), male (n=370)

Q: Have you ever heard of the terms “binge-watching” or “binge-viewing”?

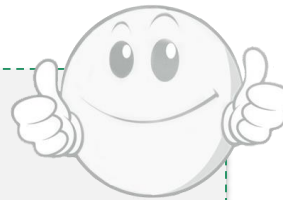
Q: Would you consider yourself to be a binge-viewer/binge-watcher?

Q: And how would you define “binge-watching” or “binge-viewing” if someone asked you what it meant?

But when informed they are binge-viewers, half of them say they do like watching TV this way, and plan to continue doing so

**1 in 2  
binge-viewers...**

...like to be a binge-viewer (51%)



**AND...**

...say they will continue binge-viewing as more TV shows are created (55%)



**BUT**

1 in 2 binge-viewers will also watch TV shows in real-time after they catch up via bingeing with all the episodes (49%)

Moreover, half of all binge-viewers discover new programs through bingeing



## **1 in 2 binge-viewers...**

- ...admit binge-viewing has introduced them to other TV shows (52%)
- ...don't plan to binge-view, but get hooked after a couple of episodes (50%)
- ...think that binge-viewing is a normal way to watch TV (47%)
- ...say that it's the best way to watch TV shows (53%)

## **AND...**

- ...discover new TV shows through streaming services and start watching the newest episodes as they air on TV (40%)

Base: binge-viewers (n=826)

Q: Please indicate your level of agreement with each of the following statements as they relate to your binge-watching experience (top 2 box agreement)



And while nearly three-quarters do not feel guilty after binge-viewing, men are more likely to see the “dark” side...

**7 in 10**  
binge-viewers...

**NOT  
GUILTY**

...do NOT feel guilty after binge-viewing (73%)  
...do NOT wish to stop binge-viewing (68%)



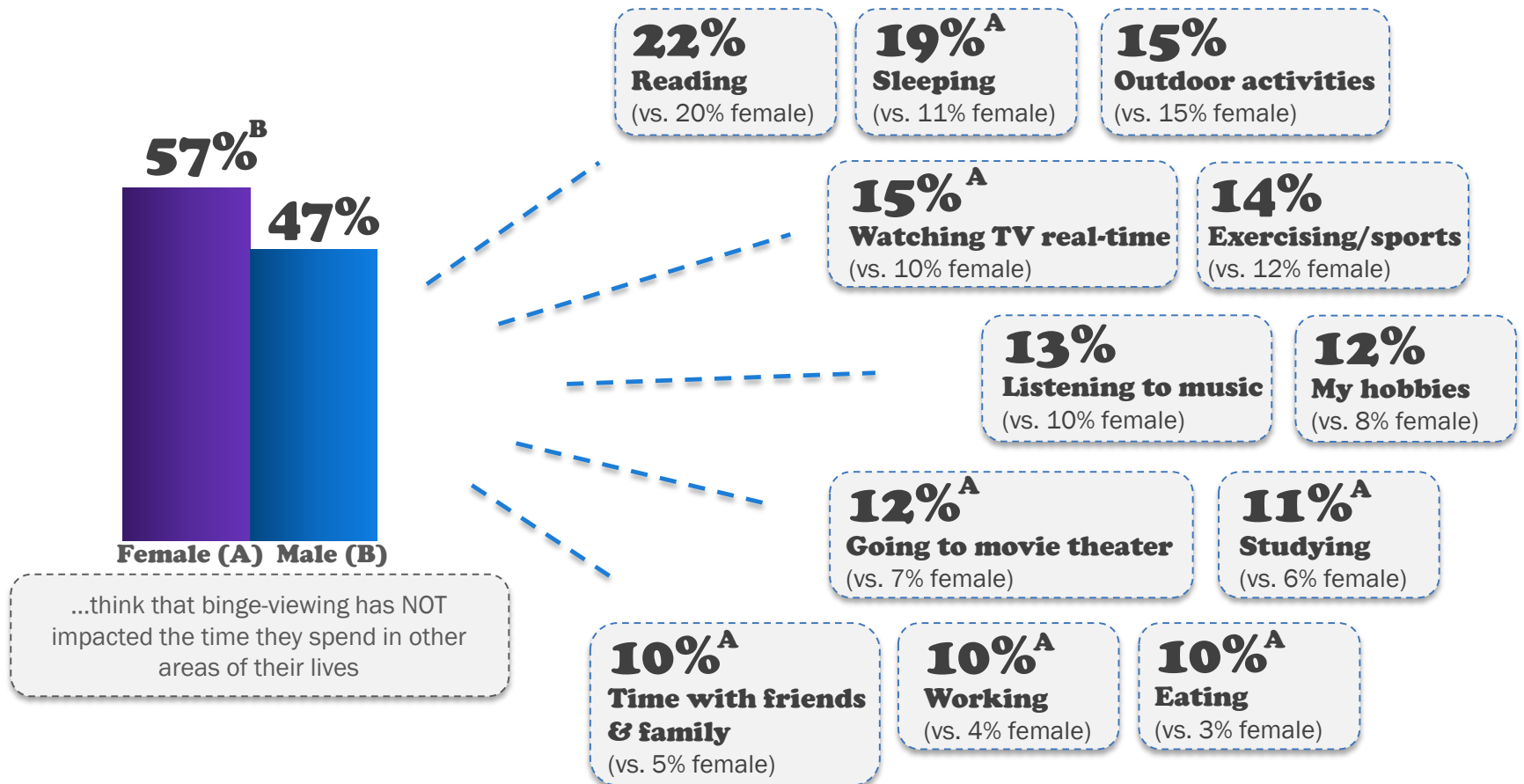
Base: binge-viewers (n=826): female (n=456), male (n=370)

Q: Please indicate your level of agreement with each of the following statements as they relate to your binge-watching experience.

Letters indicate statistically significant difference at 95% confidence interval

...and recognize that there are some negative side effects of binge-viewing

What binge-viewing has displaced



Base: female binge-viewers (n=456), male binge-viewers (n=370)

Q: As a binge-watcher, what do you find yourself having **less or no time for** in your life?

Letters indicate statistically significant difference at 95% confidence interval

# Nevertheless, while men are more invested in their binge-viewing experience...

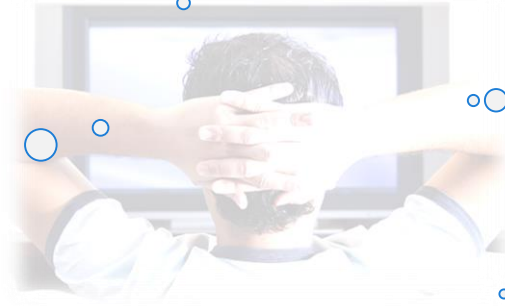
## Binge-viewing sentiments<sup>1</sup> – top 2 box ~among male binge-viewers~

Spend **more time watching TV** shows than I used to because of my binge-viewing (45% vs. 34% female)

I **wait until the full season** of a TV show is available before I start watching it (32% vs. 23% female)

Discover new TV shows through **streaming** services and **start watching** the newest episodes as they air **on TV** (44% vs. 37% female)

I would **pay more money** for immediate access to the full season of a TV show (32% vs. 24% female)



I **schedule my binge-viewing** ahead of time (34% vs. 22% female)

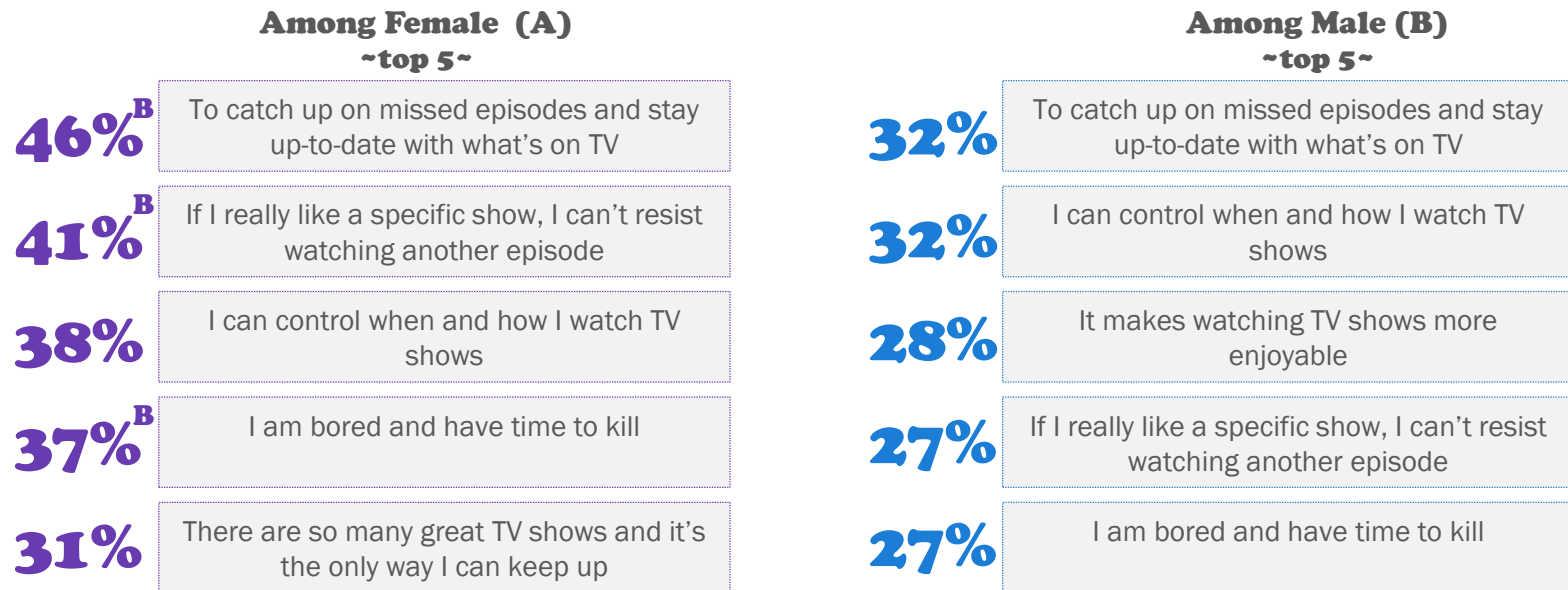
Base: female binge-viewers (n=456), male binge-viewers (n=370)

Q: Please indicate your level of agreement with each of the following statements as they relate to your binge-watching experience.

<sup>1</sup>Statistically significant difference vs. counterpart at 95% confidence interval

...for the most part, both men and women binge-view for the same reasons, with women doing so to a greater extent

## Reasons for binge-viewing



Further, women<sup>1</sup> binge-view because of a need for instant gratification:

- They don't have to wait to see what happens in the show (28% vs. 16% males)
- They get addicted after the first episode (25% vs. 19% males)

Base: binge-viewers (n=826): female (n=456), male (n=370)

Q: In general, for what reasons do you binge-watch?

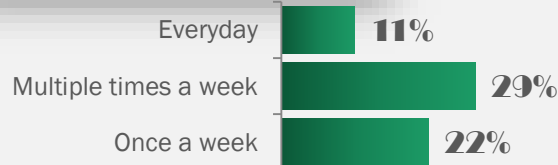
<sup>1</sup>Statistically significant difference vs. counterpart at 95% confidence interval

# Binge-viewing is a frequent activity done mostly during prime time...

How often do you binge-view?

**2 in 3**

... binge-view at least once a week (62%)



When do you typically binge-view?



**Weekday**

**58%**

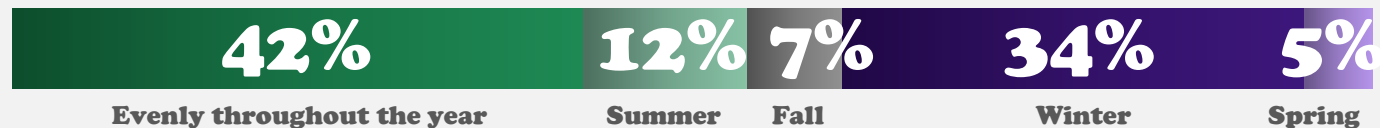
in the evening

**Weekend**

**60%**

in the evening

When do you binge-view the most?



Females (46%) are significantly more likely to binge-view evenly throughout the year than males (38%)

Northeasters (43%) and Midwesterners (46%) are more likely to binge-view during Winter than Southerners (26%) and Westerners (29%)

Base: binge-viewers (n=826): female (n=456), male (n=370), Northeast (n=152), Midwest (n=178), South (n=307), West (n=189)

Q: How often do you typically binge-watch TV shows?

Q: And when do you typically binge-watch TV shows?

Q: Thinking about the past year, when did you binge-watch TV shows the most?

...and occurs primarily at home through a video streaming service or broadcast/cable TV

### Binge-viewing happens via:



Male binge-viewers (46%) are significantly more likely to binge-view via broadcast/cable TV compared to females (59%)

### Hence, the most common devices are:



54%



27%



23%

They binge-view at home (98%)...



...either alone (67%)...

...or with a significant other (38%)

Base: binge-viewers (n=826)

Q: How do you typically binge-watch TV shows?

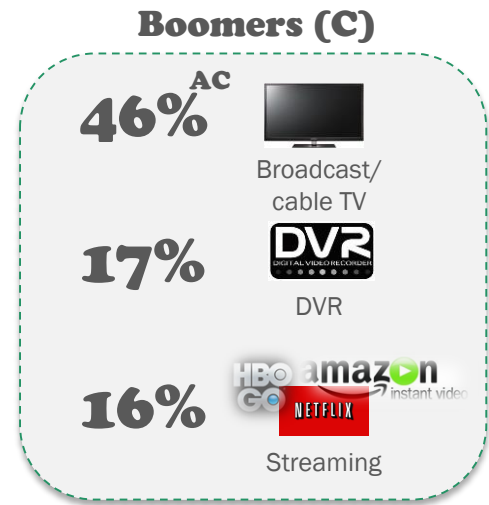
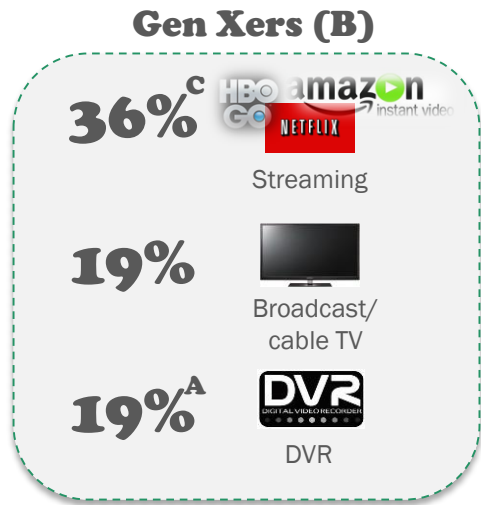
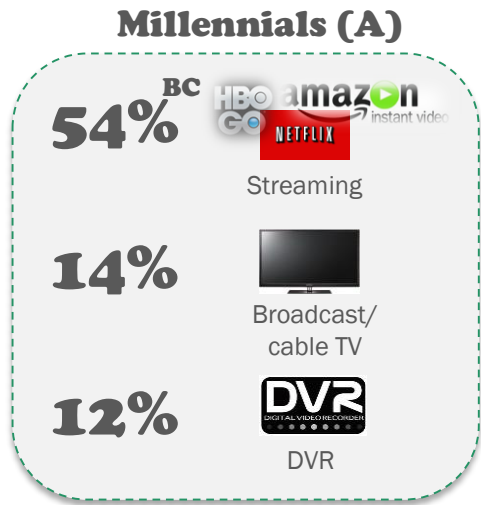
Q: And what device do you typically use to binge-watch TV shows?

Q: Where do you typically binge-watch TV shows?

Q: With whom do you typically binge-watch TV shows?

# Platform preference is consistent with typical binge-viewing behavior, and is indicative of one's generational TV viewing habits

Preferred binge-viewing platform – top 3  
~among total binge-viewers~

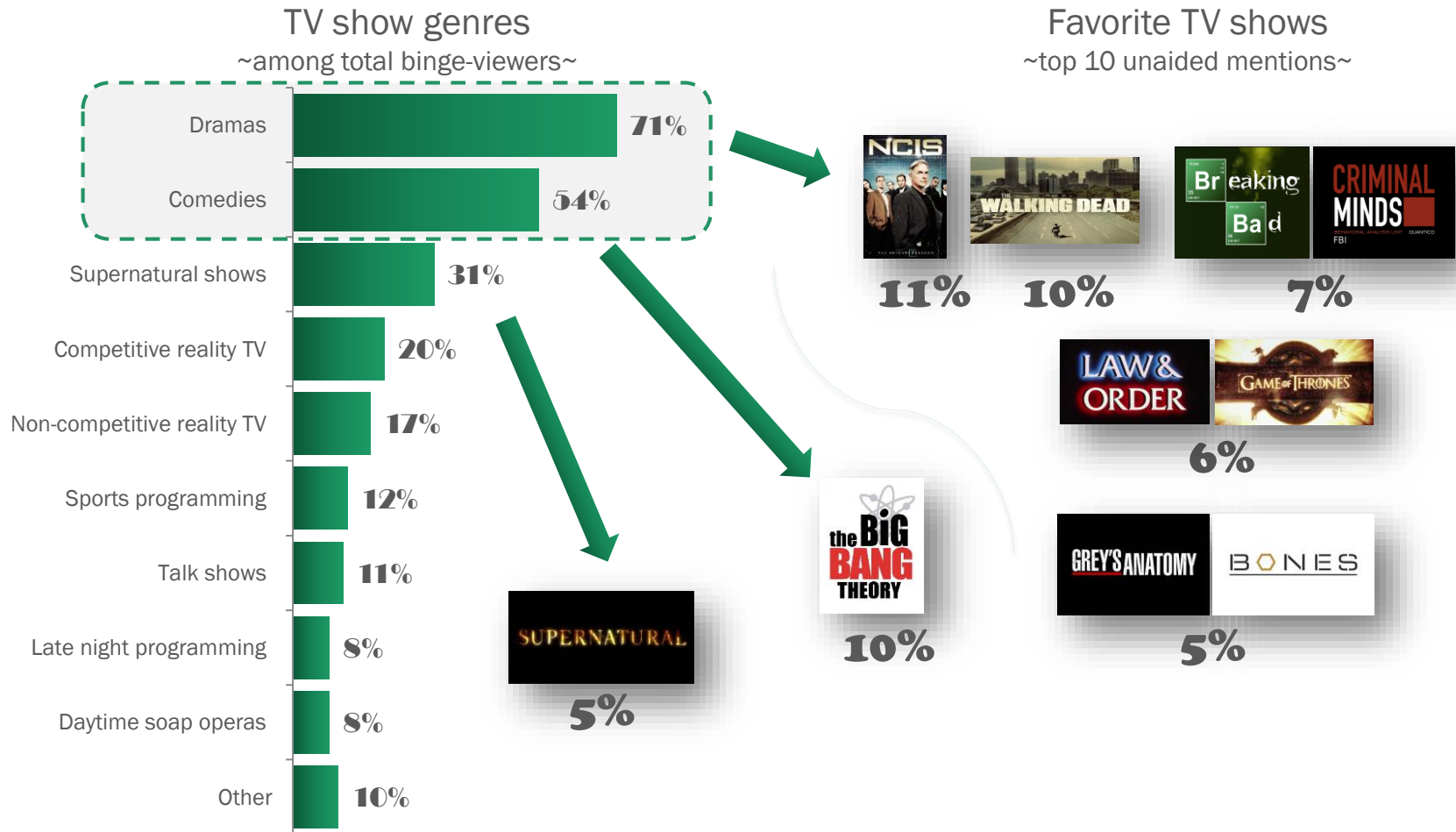


Base: binge-viewers (n=826): Millennials (n=290), Gen Xers (n=247), Boomers (n=289)

Q: And what is your preferred way to binge-watch?

Letters indicate statistically significant difference at 95% confidence interval

# Drama and comedy prevail as the most binge-viewed genres



Base: binge-viewers (n=826)

Q: Which types of TV shows do you typically binge-watch?

Q: What are your favorite TV shows to binge-watch?



# Binge-viewers tolerate ads, even though they say it takes away from their binge-viewing experience

Advertising sentiments – top 2 box  
~among binge-viewers~

## 1 in 2 binge-viewers...

- ...enjoy binge-viewing because they don't have to watch ads (58%)
- ...think that ads take away from enjoyment of TV shows (57%)
- ...think that ads have no place in binge viewing experience (53%)
- ...are more annoyed by ads when binge-viewing compared to when watching TV in smaller doses (40%)

## BUT...

- ...1 in 2 binge-viewers also agree that binge-viewing or not, ads come with the territory (49%)



Male binge-viewers are significantly more positive towards ads compared to females

## Further...

- ...over a third of binge-viewers wouldn't mind seeing ads while binge-viewing if it lowered their subscription rate (38%)
- ...over a third agree that ads provide a break during the binge-viewing experience (35%)

# More importantly, binge-viewers are significantly more receptive to ads compared to non-bingers



Base: binge-viewers (n=826), non-binge-viewers (n=481)

Q: How much do you agree or disagree with each of the following statements about advertising?

Letters indicate statistically significant difference at 95% confidence interval

# KEY TAKEAWAYS

- ✓ Binge-viewing is not an atypical behavior – two-thirds (63%) of all TV viewers binge-view frequently, and mostly during prime time
- ✓ Despite the assumption that binge-viewing primarily occurs through video streaming, bingeing is almost equally split between streaming services (50%) and broadcast/cable TV (43%); platform preference is indicative of one's generational TV viewing habits
  - As bingeing becomes even more widespread, there will surely be impact on video content consumption via streaming services, as well as through broadcast/cable networks
- ✓ Binge-viewing leads to program discovery, bringing TV viewers back to real-time TV watching after they have caught up with all episodes (e.g., 'Breaking Bad' success)
- ✓ Despite a conventional wisdom that binge-viewers are avoiding ads, they are not only tolerant of ads, but are even more receptive to them compared to non-bingers
  - Binge-viewers are twice as likely than non-bingers to see and share ads on social media, as well as talk about ads with friends and family – marketers could leverage binge-viewers' engagement with ads and look for cross-marketing opportunities and branded integration efforts with the most popular programs
- ✓ Binge-viewing behaviors differ by gender – men binge-view by appointment, whereas women are more impulsive, and binge-view because of a need for instant gratification
- ✓ There is no shame in bingeing – nearly three-quarters of binge-viewers do not feel guilty about their binge-viewing experience, even though they are aware of some negativity that comes with it, especially as recognized by men
  - Binge-viewers enjoy watching TV this way, and plan to continue doing so in the future

# For questions about this research please contact:

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