

THE REMOTE CONTROLLER

Captify's latest Impact study provides a pulse on how COVID-19 lockdown is **impacting consumer behavior** around the **at-home streaming and gaming economy** and how brands can connect with the 'remote control' consumer. Using dynamic, fresh and real-time onsite Search Data, Captify reveals what consumers are searching for as of today...

This global data was collected from January 1, 2020 to April 2, 2020 from billions of monthly onsite searches that Captify captures across its premium publisher network

COVID-19 = SHIFTING PRIORITIES

Routines, hobbies and lives have been turned upside down as people adjust to a **new normal** in light of COVID-19. Captify analyzes onsite search behavior for the at-home consumer to understand how global **interests** and **priorities have changed**, revealing the **brands, programs** and **games** that are **curing lockdown boredom**.

USED TO BE SEARCHING FOR (PRE COVID-19)

INTEREST	INDEX
BLOGS	28.4X
FITNESS	25.3X
SOCIALIZING	10.4X
CELEBRITIES	6.2X
FASHION	5.6X
BEAUTY & COSMETICS	3.8X
LUXURY LIFESTYLE	3.7X

STILL SEARCHING FOR

INTEREST	INDEX
TRAVEL	207.4X <small>Triggered by searches for cancellations & travel deals</small>
GAMING	113.9X
PETS	25.7X
COMPUTERS	7.3X
FOOD & COOKING	6.7X
FINANCE	6.0X
HEALTHCARE	1.4X

NEW SEARCH INTERESTS

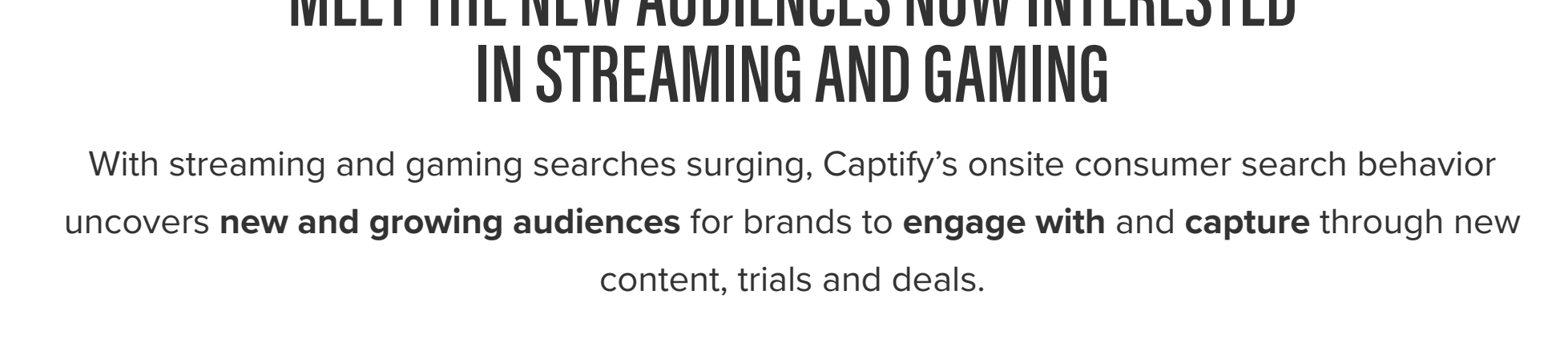
INTEREST	INDEX
TV & STREAMING	31.4X
SOCIAL MEDIA	14.7X
BRAND LOYAL	14.6X
GAMBLING	7.6X
HOME IMPROVEMENTS	6.5X
NEWS	3.1X
QUALITY SEEKING	1.9X

HOW IS STREAMING AND GAMING INTENT BEING IMPACTED?

With the world in lockdown, consumers are now trying to navigate this new reality and reassess their priorities—for the first time, **entertainment** and **connectivity** are being held up as necessities.

Through onsite search behavior analysis, Captify reveals how **consumer appetite for streaming and gaming** has shifted and how this trend correlates with rising search interest around COVID-19.

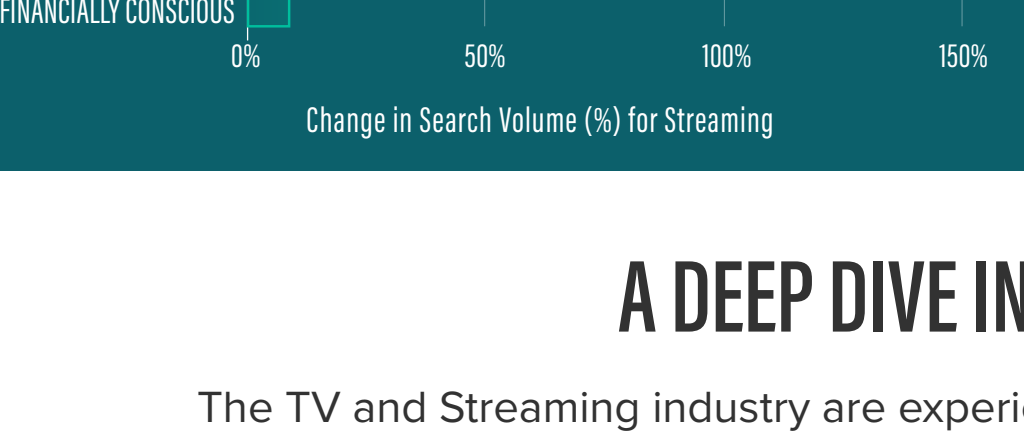
SEARCH TREND FOR STREAMING, GAMING AND COVID-19:



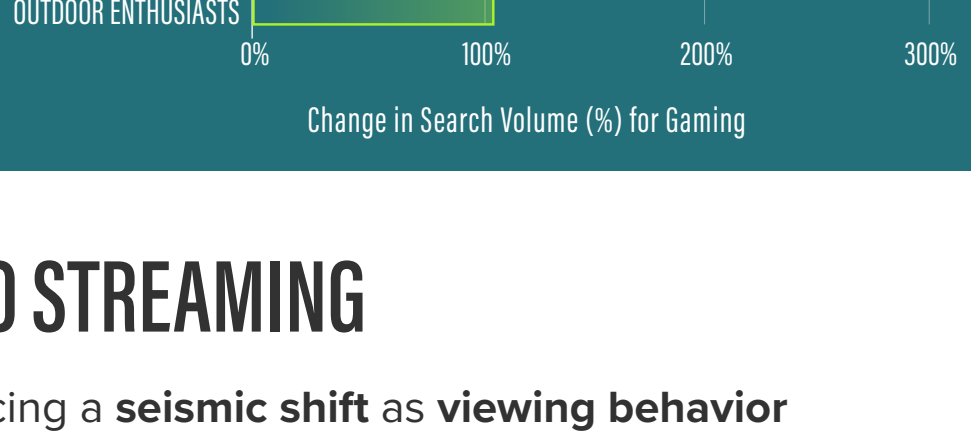
MEET THE NEW AUDIENCES NOW INTERESTED IN STREAMING AND GAMING

With streaming and gaming searches surging, Captify's onsite consumer search behavior uncovers **new and growing audiences** for brands to **engage with** and **capture** through new content, trials and deals.

TOP AUDIENCES SEARCHING AROUND STREAMING:



TOP AUDIENCES SEARCHING AROUND GAMING:



A DEEP DIVE INTO STREAMING

The TV and Streaming industry are experiencing a **seismic shift** as **viewing behavior accelerates** and audiences from Gen Z, Silver Surfers to Parents look to keep themselves entertained during lockdown. Through real-time Search Data, Captify deep dives into how **streaming interest** is shifting and which **brands** are **front of mind** for consumers.

CONTENT IS KING AND PRICE NO LONGER DOMINATES

While **streaming prices, offers and deals** were a key area of search interest for consumers in **January**, Captify reveals that when lockdown restrictions heightened, **importance shifted** towards **content offerings**.

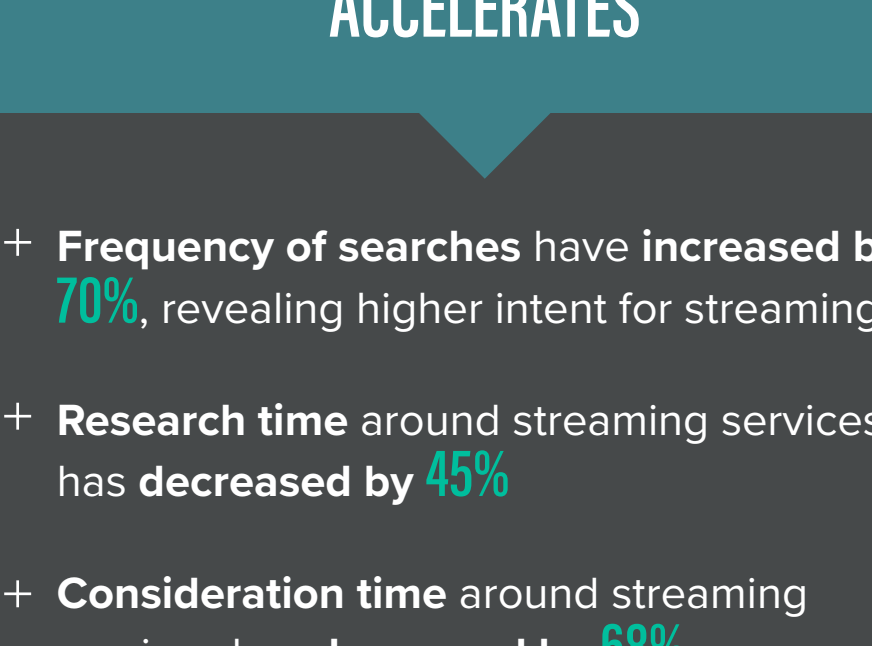
STREAMING WARS GETS EVEN MORE HEATED

As consumers browse for new shows and movies to keep them entertained throughout lockdown, Captify reveals which **streaming providers** consumers are turning to for their **entertainment fix**.

ANALYZING DEALS VS CONTENT SEARCHES FOR STREAMING:



GLOBAL SEARCH VOLUME (%) FOR TOP STREAMING SERVICES:



WHICH AUDIENCES ARE THINKING OF CORD-CUTTING IN LIGHT OF LOCKDOWN?

- SPORTS FANS **2.66X**
- STAY AT HOME PARENTS **2.59X**
- CAREGIVERS **2.18X**
- ECO-CONSCIOUS **2.13X**
- SILVER SURFERS **2.0X**

KILLER INSIGHTS:
 + In March, Cord-Cutters searched for **7 streaming brands** on average, in contrast to an overall streaming audience that searched for just **2 brands** on average.
 + When Cord-Cutters are looking for content inspiration, Disney+ accounts for over **95%** of streaming searches with Netflix only accounting for 3%

CORD-CUTTING CONSIDERATION ACCELERATES

- + **Frequency of searches** have increased by **70%**, revealing higher intent for streaming
- + **Research time** around streaming services has **decreased by 45%**
- + **Consideration time** around streaming services has **decreased by 68%**
- + **145% search uplift** for **subscription plans** as consumers look to upgrade their streaming subscription for **ad-free streaming** or to **extend their profile** with other family members

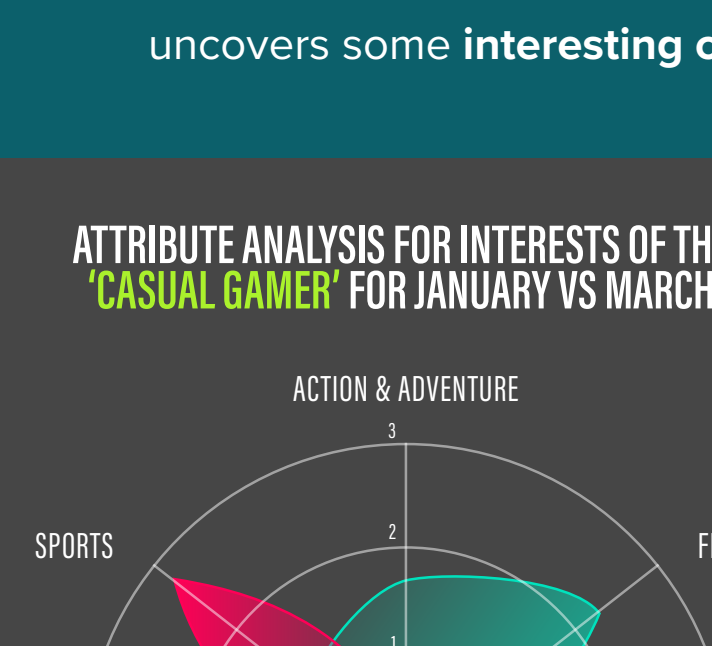
KILLER INSIGHT:
 + Consumer search interest for music streaming has actually **decreased by 35%** compared to the beginning of the year

A DEEP DIVE INTO GAMING

Social distancing and lockdown has already started to radically reshape all forms of human interaction. Consumers are looking for alternative and creative ways to continue their **social interactions** and **stay connected with friends and family**. Captify reveals how gaming is one of the verticals benefiting from this behavioral shift.

GAMING LEADERBOARD

With the gaming vertical seeing a **253%** search increase in March alone, Captify analyzes the Top 10 most searched for games by consumers:



Pokémon GO was originally created to encourage gamers to get outside & explore the world. Niantic recently announced they'll be adapting the game so players can team up with friends & battle from the comfort of their home

NETFLIX, BUT FOR GAMES

With the crisis causing consumers to avoid shops and human interaction, Captify reveals there's been a **89%** search increase for gaming **subscription services** since Jan 1 as consumers opt to stream over buying games outright. This might also suggest casual gamers are not as willing to invest in games as it's a temporary hobby.

KEEPING A PULSE ON GAMERS - FROM THE CASUAL TO THE CORE AUDIENCE

Through analysis of search behavior around **two key gaming audiences**, Captify uncovers some **interesting changes in gaming preferences** in light of COVID-19.

ATTRIBUTE ANALYSIS FOR INTERESTS OF THE 'CASUAL GAMER' FOR JANUARY VS MARCH



ATTRIBUTE ANALYSIS FOR INTERESTS OF THE 'CORE GAMER' FOR JANUARY VS MARCH



KILLER INSIGHTS:

- + **SWITCHING HOCKEY STICKS FOR JOYSTICKS** — With mass live sports cancellations, consumers are looking for their sports fix elsewhere. Captify reveals consumer interest for **Sports Games** saw a **1054%** search uplift since Jan 1 with the top indexing audience being Sports Fans.
- + **MULTIPLAYER GAMES SEE A BOOST** — With consumers unable to socialize in person, they're looking for alternative ways to stay connected with friends. Online gaming is seeing a boost, with a **121%** search increase for multiplayer games since Jan 1.

TUNING IN AROUND THE WORLD

Captify analyzes at-home preferences across the globe to understand **what matters to different consumers** and which brands are sparking the most interest.

This local data was collected from January 1, 2020 to April 2, 2020 from billions of monthly onsite searches that Captify captures across its premium publisher network

US MARKET FOCUS

SEARCH UPLIFT FOR Streaming: ↑80%	SEARCH UPLIFT FOR Gaming: ↑48%
TOP 3 SEARCHED FOR STREAMING BRANDS:	TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING:
01 Disney+ 82%	01 Content 3.0X
02 NETFLIX 12%	02 Plans & Packages 0.5X
03 peacock 6%	03 Bundles & Extras 0.4X

UK MARKET FOCUS

SEARCH UPLIFT FOR Streaming: ↑134%	SEARCH UPLIFT FOR Gaming: ↑200%
TOP 3 SEARCHED FOR STREAMING BRANDS:	TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING:
01 Disney+ 58%	01 Contract Commitments 6.2X
02 NOW TV 37%	02 Content 2.2X
03 NETFLIX 7%	03 Trials 1.9X

FRANCE MARKET FOCUS

SEARCH UPLIFT FOR Streaming: ↑65%	SEARCH UPLIFT FOR Gaming: ↑58%
TOP 3 SEARCHED FOR STREAMING BRANDS:	TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING:
01 orange 66%	01 Content 2.5X
02 CANAL+ 24%	02 Contract Commitments 0.5X
03 NETFLIX 10%	03 Prices, Offers & Deals 0.2X

SPAIN MARKET FOCUS

SEARCH UPLIFT FOR Streaming: ↑125%	SEARCH UPLIFT FOR Gaming: ↑68%
TOP 3 SEARCHED FOR STREAMING BRANDS:	TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING:
01 Disney+ 52%	01 Content 2.5X
02 prime 25%	02 Contract Commitments 0.4X
03 NETFLIX 23%	03 Prices, Offers & Deals 0.1X

ITALY MARKET FOCUS

SEARCH UPLIFT FOR Streaming: ↑115%	SEARCH UPLIFT FOR Gaming: ↑31%
TOP 3 SEARCHED FOR STREAMING BRANDS:	TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING:
01 NETFLIX 82%	01 Streaming Quality 1.8X
02 Rai Play 9%	02 Content 1.5X
03 DAZN 9%	03 Plans & Packages 0.3X

AUSTRALIA MARKET FOCUS

SEARCH UPLIFT FOR Streaming: ↑125%	SEARCH UPLIFT FOR Gaming: ↑251%
TOP 3 SEARCHED FOR STREAMING BRANDS:	TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING:
01 Stan 60%	01 Content 1.6X
02 NETFLIX 24%	02 Functionality 1.1X
03 Disney+ 16%	03 Contract Commitments 0.7X



THE TRENDS DESK

Powered by Sight, the Insights Studio

Interested to find out how your brand is being impacted by global lockdown? Get in touch with Captify's Trends Desk.

REQUEST INSIGHTS

*For brands, agencies & publisher partners only

ABOUT CAPTIFY

Captify is the largest holder of consumer search data outside of Google, and its unique technology understands the intent and interests of consumers across all channels, including voice search, desktop on-site search and in-app search.

Captify's Search Intelligence powers media and insights for 800+ of the world's biggest brands.