

THE 360° AUDIENCE VIEW UNDERSTANDING VOD

April 2021

PRIVATE & CONFIDENTIAL

This report contains preliminary data from new techniques that BARB will launch later this year.

For limited distribution to BARB subscribers (broadcasters, production companies, advertisers, agencies and Ofcom only).

For many years, viewers have become increasingly accustomed to watching what they want, when they want.

The rise of video-on-demand (VOD) services has been a significant contributor to this trend, with UK broadcasters leading the way for many years by investing in BVOD services that complement their established linear channels. Stand-alone subscription VOD services are also increasing in popularity, while wider trends have accelerated this behaviour – a common question during the pandemic lockdowns has been “which box-sets are you watching?”

BARB has been a pioneer in measuring all forms of viewing and VOD is no exception. This white paper highlights our established reporting of broadcaster video on-demand services and previews examples of viewing figures for SVOD at both the service and content level.

Reporting SVOD audiences is a service enhancement we will launch alongside other developments later this year. These are enabled by installing a meter on WiFi routers in broadband homes on our nationally-representative panel. Importantly, these new meters will provide more certainty on whether post-broadcast viewing was through a BVOD service or via linear playback – another step in providing the full 360° audience view.

You can read more about the new meter technology in Notes on Methodology on page 11.

BVOD PROGRAMME AUDIENCES

As broadcasters’ on-demand platforms have grown and attracted bigger audiences, they have become places that not only offer catch-up viewing or the chance to watch an episode again. They are destinations in their own right. Individual episodes, or whole series, are often available on these services before a showing on linear TV, or even without a linear broadcast being planned.

Part of providing this 360° audience view is to deliver measurement for programmes on BVOD services that have not been broadcast on linear TV, something that BARB can do with the assistance of the broadcasters in providing audio assets. >>

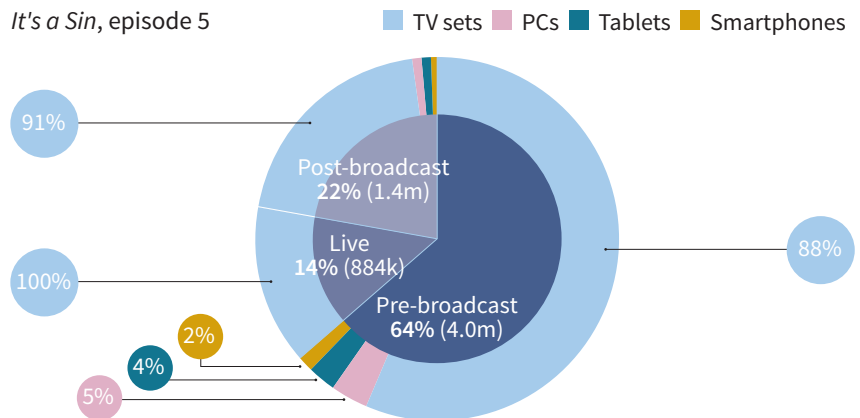
Our first example is episode 5, the series finale, of the Channel 4 drama *It's a Sin*. Broadcast on linear TV in January and February, the series was fully-available on All4 once the first episode had aired.

This means an engaged audience didn't need to wait for the weekly episode to watch the show. In fact, a large proportion sought out the whole series on-demand. When the episode 5 finale premiered on Channel 4 on February 19th, 4 million viewers had already watched it. This represents 64% of the 6.3m who watched the episode by March 19th, 28 days after its first linear broadcast.



1 360° AUDIENCE VIEW

It's a Sin, episode 5



Source: BARB. Individuals 4+ viewing to episode 5 between January 22nd-March 19th 2021
Post-broadcast category includes all viewing to linear repeat, up to 28 days after linear premiere

A LARGE PROPORTION OF VIEWERS SEEK OUT WHOLE SERIES ON-DEMAND

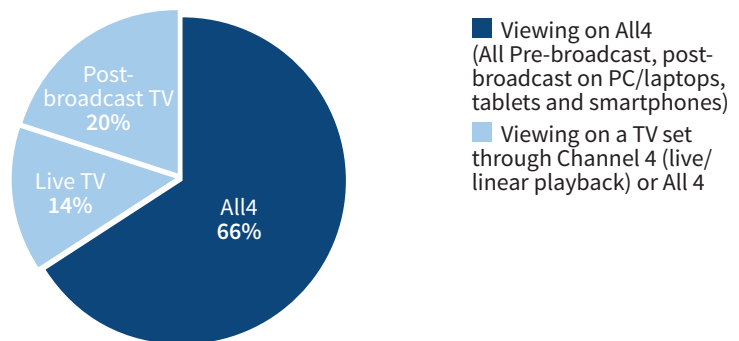
Cutting these data in a different way starts to answer another key question – to what extent did viewers watch this content via the BVOD service, All4?

While self-recorded PVR playback is available for TV sets, we know all viewing of episode 5 on a PC/laptop, tablet or smartphone will be via All4. We also know that all pre-broadcast viewing on a TV set will be through All4, as the programme had not yet been broadcast on Channel 4 for viewers to record. >>



2 360° AUDIENCE VIEW

It's a Sin, episode 5



Source: BARB. Individuals 4+ viewing to episode 5 between January 22nd-March 19th 2021
Post-broadcast TV includes viewing to linear repeat, up to 28 days after linear premiere

**INSIGHT INTO
PRE-BROADCAST
VIEWING
CONTRIBUTES
TO SHOWING
HOW AUDIENCES
BUILD OVER
64 DAYS**

Taking the same viewing data for episode 5 of *It's a Sin*, the total of all these segments is 4.1m viewers - at least 66% of the total audience who watched the episode from the start of its availability until 28 days after its first broadcast on Channel 4 had watched the show via All4.

That leaves two remaining segments, live viewing on a TV set, and post-broadcast viewing on a TV set. Seeing how much of this viewing comes from All4 will be possible when data from the router meters are available. It's likely the bulk of live viewing will be via linear, but with access to BVOD services increasingly integrated in smart TVs, viewers have more options for both live and post-broadcast viewing.

The immediate availability of whole series allows viewers to watch at their own pace. Splitting the BARB audience figures by date can demonstrate how viewing builds over time. We can see this by looking at the episode 12 finale of the BBC series *Normal People*, another show where all episodes were available in advance of a linear broadcast.

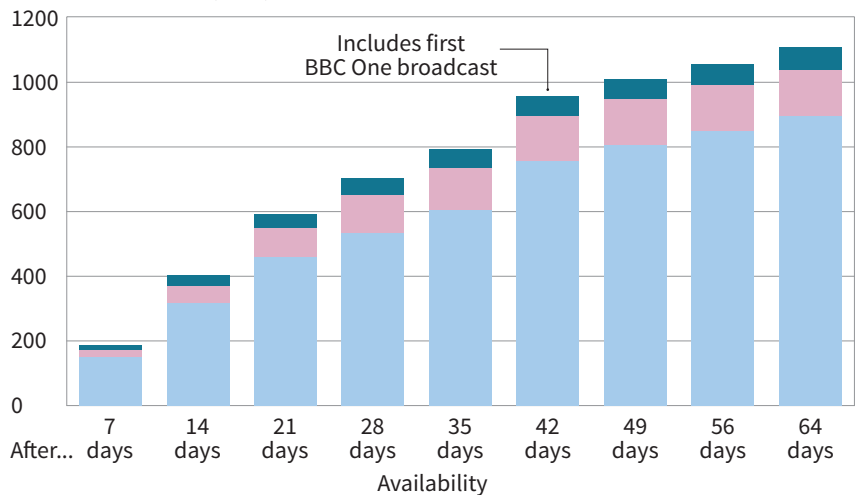


3 CUMULATIVE AUDIENCE BUILD

Normal People, episode 12, Adults 16-34

■ TV sets ■ PCs ■ Tablets

Cumulative viewers (000s)



Source: BARB. Adults 16-34 viewing to episode 12 between April 26th-June 29th 2020

Including the pre-broadcast period, the day of the first linear broadcast and then the 28 days of viewing that BARB measures after a linear transmission gives a period of 64 days during which viewing to this programme can be tracked. Chart 3 shows the growth in audience among Adults 16-34 and demonstrates how almost 800k had watched the episode before it was broadcast live. The linear broadcast produces a bump, before the post-broadcast viewing takes the total audience to 1.1m Adults 16-34 across this 64-day period.

This chart could be produced for individual days, if necessary, but is shown grouped into seven-day periods for clarity. >>

We can also see how the appetite for binge-viewing differs by age.

Taking the total three-screen viewing of the *Normal People* finale for people aged 4+ and those aged 16-34, we see how the rate of this audience-build differs. It's clear younger people are less likely to wait for episodes to be part of a linear schedule.

Of the 1.1m 16-34 year olds who watched the episode across the 64 days that BARB measures, more than half had done so after three weeks of availability. This same 50% threshold wasn't reached among all viewers aged 4+ until two weeks later, when the episode had been available for 35 days.

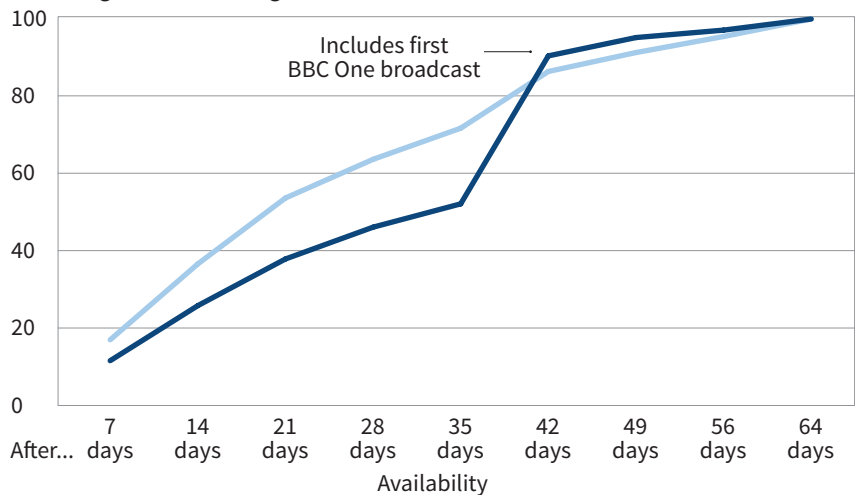


4 CUMULATIVE AUDIENCE BUILD, BY AGE

Normal People, episode 12

■ Individuals 4+ ■ Adults 16-34

Percentage of total viewing



Source: BARB. Viewing to episode 12 between April 26th-June 29th 2020

YOUNGER VIEWERS ARE MORE LIKELY TO TAKE THE OPPORTUNITY TO WATCH AHEAD

Comparing the curves, there is also a notable spike for the 4+ group in the 7-day period that includes the date this episode was first broadcast on BBC1. The proportion of total viewing jumps from 52% to 90% here – showing the large amount of viewing contributed by linear viewers. By contrast, although there is an increase at this point among Adults 16-34 – from 72% to 86% – it is smaller and from a higher starting point, showing that many younger adults had taken the opportunity to watch ahead.

Once again, router-meter data will help BARB enhance the depth of insight into these audiences. Charts 3 and 4 don't include viewing from smartphones, which is not currently broken out by age. This will be possible once router-meter data are available. >>

SVOD PROGRAMME AUDIENCES

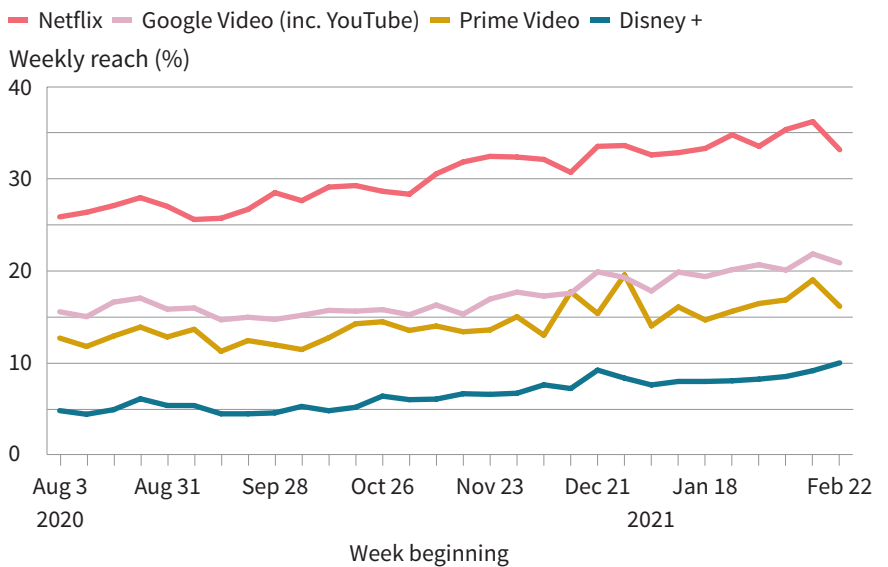
Another important requirement for the industry is to understand how people are watching SVOD and video-sharing platforms. Our previous white paper, *Coming Into Focus*, showed that another key benefit to the router meters is the ability to measure these services in broadband homes.

Chart 5 shows how the reach of the leading services continued to increase across 2020 and into 2021. By February 2021, the weekly reach of Netflix on a TV set was regularly hitting 33% of people aged 4+.



5 WEEKLY REACH OF SVOD AND VIDEO-SHARING PLATFORMS

TV set only, weeks from August 3rd 2020-February 22nd 2021



Source: BARB. Individuals 4+. TV set reach by week
Preliminary data collected from partial router-meter rollout

TV-SET REACH OF SVOD SERVICES REACHED 45% IN CHRISTMAS WEEK

There was an uplift for most services in Christmas week, when both Netflix and Disney+ achieved their highest weekly reach on a TV set of 2020. Of course, this is also a time when TV viewing as a whole is at a peak. For context, reach of BARB-reported linear channels in this week was 90%, while the overall reach of these SVOD and video-sharing platforms was 45%.

This analysis also shows the benefit of new content. It’s notable the 2020 peaks for Amazon Prime Video were not achieved in Christmas week, but in the weeks immediately before and after – both of which coincided with the streaming service’s coverage of full rounds of Premier League football fixtures.

During the period of this analysis, Disney+ saw reach build generally as access to the service increased, with the arrival of *The Mandalorian* season 2 perhaps helping sustain a higher level from November onwards. While the greater viewing opportunities around Christmas time were likely a factor in the increased reach during this period, the release of a new Pixar movie *Soul* in that week would have also contributed. Finally, the last week of the chart shows how the launch of the Star general-entertainment content enabled Disney+ to increase its reach on a TV set to a new high-water mark of 10%. >>

TWO EPISODES OF SEASON 4 OF *THE CROWN* WERE IN THE TOP-10 PROGRAMMES OF THE DAY

Chart 5 illustrated an increase in reach for Netflix in November, around the launch of season 4 of *The Crown*. The good news is we are developing another new capability that will allow us to report audiences for specific programmes on SVOD services. This SVOD content ratings solution will offer the same level of analysis that's available for programmes on BARB-reported channels.



6 LAUNCH WEEK VIEWING OF *THE CROWN* SEASON 4

Rank	Channel	Title	Average audience (m)
1	ITV	<i>I'm a Celebrity...Get Me Out Of Here...</i>	13.78
2	BBC One	<i>Strictly Come Dancing</i>	9.53
3	BBC One	<i>Countryfile</i>	6.34
4	BBC One	<i>BBC Weekend News</i>	5.90
5	ITV	<i>Family Fortunes</i>	5.07
6	BBC One	<i>His Dark Materials</i>	4.93
7	ITV	<i>ITV News</i>	4.76
8	Netflix	<i>The Crown, season 4, episode 1</i>	3.65
9	Netflix	<i>The Crown, season 4, episode 2</i>	3.17
10	BBC 2	<i>Cornwall with Simon Reeve</i>	3.05
15	Netflix	<i>The Crown, season 4, episode 3</i>	2.77
18	Netflix	<i>The Crown, season 4, episode 4</i>	2.58
20	Netflix	<i>The Crown, season 4, episode 5</i>	2.26
22	Netflix	<i>The Crown, season 4, episode 6</i>	2.05
23	Netflix	<i>The Crown, season 4, episode 7</i>	1.80
26	Netflix	<i>The Crown, season 4, episode 8</i>	1.60
29	Netflix	<i>The Crown, season 4, episode 10</i>	1.42
31	Netflix	<i>The Crown, season 4, episode 9</i>	1.36

Source: BARB. Individuals 4+. TV set viewing to *The Crown* season 4 from November 15th-22nd 2020. Linear data are consolidated 7-day TV set audiences for November 15th 2020, programmes of 5+ mins duration

Chart 6 shows average audiences per episode across the first week of availability of *The Crown* season 4, from November 15th-22nd 2020 inclusive. Ranked against consolidated 7-day TV set data for linear programmes on November 15th, the first episode came in at number eight with an average audience of 3.65m viewers.

As with the earlier examples from *Normal People* and *It's a Sin*, all episodes from season 4 of *The Crown* were released on the same day, and it becomes clear how many viewers devoured the series in the first week. Episode 10 delivered an average audience of 1.42m in the first week after launch, indicating that these viewers had likely watched all of season 4 during the first week it was available. ➡

THE PROFILE FOR *THE CROWN* BECOMES MORE SKEWED TOWARDS FEMALE AND YOUNGER VIEWERS BETWEEN THE FIRST AND LAST EPISODES

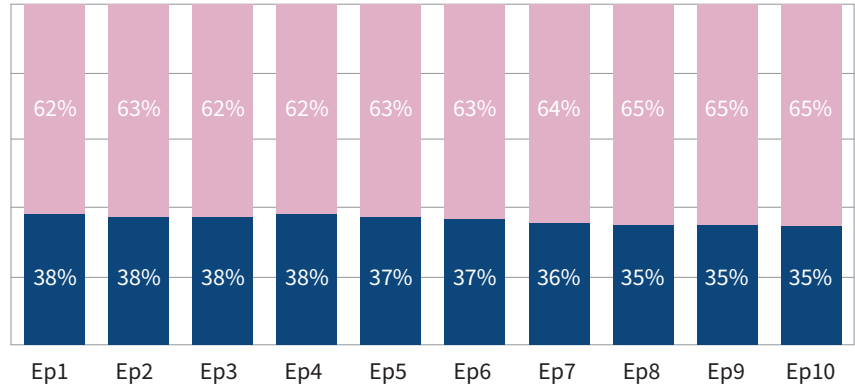
Not only do we know how many people watched *The Crown*, we also know what type of people they are.



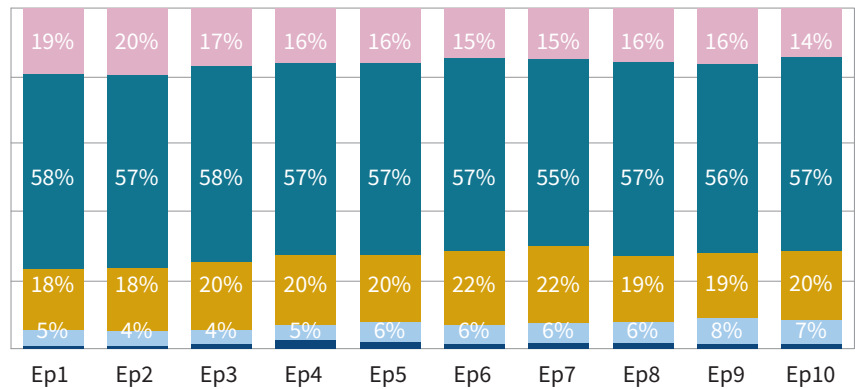
7 VIEWING PROFILES FOR *THE CROWN*, SEASON 4

Gender and age profiles, TV set only

Male Female



4-15 16-24 25-34 35-64 65+



Source: BARB. Based on viewing to *The Crown* season 4 in the first week after launch. Profiles based on average audience to each episode

Across the viewing to all ten episodes in the first week after release, *The Crown* had a female-skew, with over 60% of the audience for each episode. Viewing also skewed towards adults aged 35-64, with over 55% of the viewing. These data show only those viewers in the first week after launch, so it's clear that the early, engaged audience of this series was more likely to be female. >>

This white paper also gives us the opportunity to report on the performance of *The Mandalorian* season 2, which is available on Disney+. We know from our Establishment Survey that fewer UK homes subscribe to Disney+ than Netflix, so we should expect programme audiences to be lower than *The Crown*. But the season 2 launch episode ranked inside the top-25 shows based on consolidated 7-day TV set viewing to programmes broadcast on Friday, October 30th.



8 LAUNCH WEEK VIEWING OF *THE MANDALORIAN*, SEASON 2

Rank	Channel	Title	Average audience (m)
1	ITV	<i>Coronation Street</i>	6.42
2	Channel 4	<i>Gogglebox</i>	6.12
3	ITV	<i>Emmerdale</i>	5.41
4	BBC One	<i>BBC News at Six</i>	5.21
5	ITV	<i>The Chase</i>	4.39
18	BBC One	<i>Pointless</i>	2.52
19	BBC 2	<i>Autumnwatch</i>	2.21
20	Channel 4	<i>The Last Leg</i>	2.00
21	Channel 4	<i>The Great British Bake Off: Extra Slice</i>	1.93
22	Disney+	<i>The Mandalorian, season 2 episode 1</i>	1.92
23	BBC One	<i>The Royle Family</i>	1.66

Source: BARB. Individuals 4+. TV set viewing to *The Mandalorian*, season 2 episode 1 from October 30th-November 6th 2020. Linear data are consolidated 7-day TV set audiences for October 30th, programmes of 5+ mins duration

THE MANDALORIAN SEASON 2 PREMIERE WAS IN THE TOP-25 PROGRAMMES OF THE DAY

With the show premiering episodes weekly, there couldn't have been any binge viewing of multiple episodes of *The Mandalorian* during the launch-week. But we can see below how the launch of a new series can influence viewing to earlier seasons.

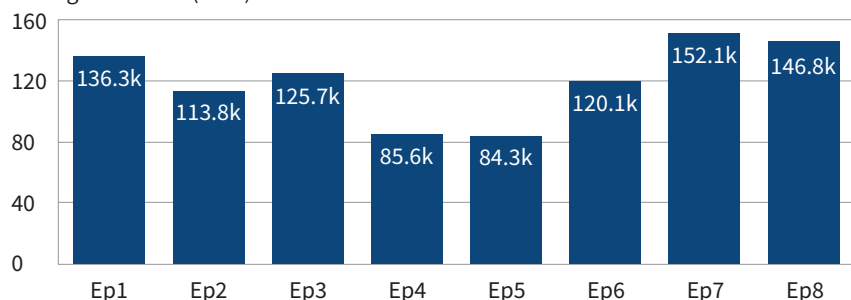
Across the week of the season 2 premiere, there was continued viewing to season 1 of *The Mandalorian*. >>



9 VIEWING TO PREVIOUS EPISODES

TV set viewing to *The Mandalorian* season 1, October 30th-November 6th

Average audience (000s)



Source: BARB. Individuals 4+. TV set viewing to *The Mandalorian*, season 1 in the week after the launch of season 2

THE MANDALORIAN VIEWERS ARE MORE MALE-SKEWED THAN THE TOTAL TV AVERAGE

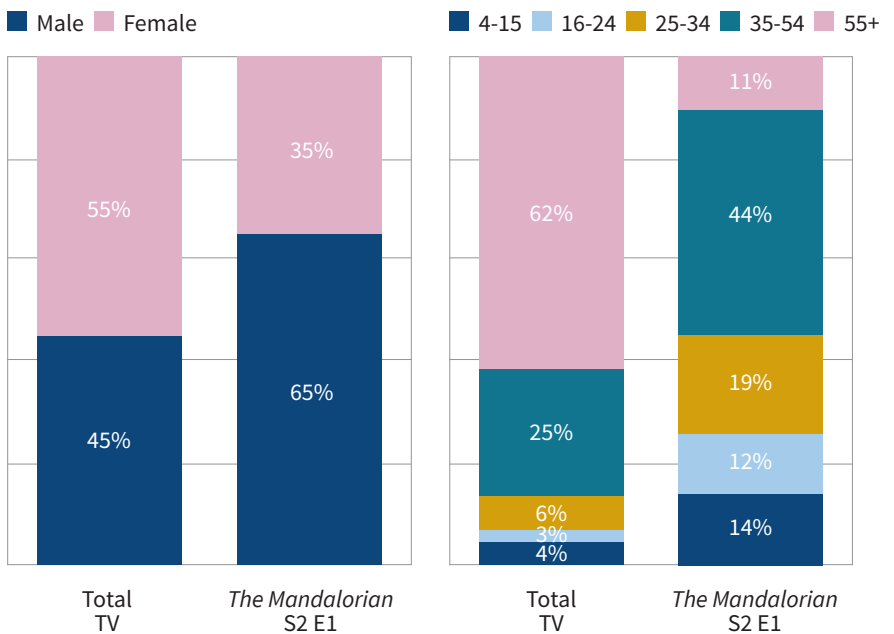
Episode 1 of the first season was one of the most-watched episodes with 136k viewers, perhaps indicating viewers new to the whole series, or new subscribers. We also see higher viewing for episodes 7 (152k) and 8 (147k), which may be viewers returning to the earlier series for a reminder before embarking on season 2.

Compared to the audience profile for *The Crown*, it's not a huge surprise to see viewers of *The Mandalorian* are quite different. Males account for almost two-thirds of the first-week viewing, effectively the inverse of the gender-profile from *The Crown*, with 75% aged between 16-54. For both age and gender, *The Mandalorian* also differs markedly from the total TV audience profile during the same period. >



10 VIEWING PROFILES FOR THE MANDALORIAN, SEASON 2

Gender and age profiles, TV set only



Source: BARB. Based on viewing to *The Mandalorian* season 2 in the first week after launch, versus Total TV viewing in the same period

As mentioned on page 5, Amazon Prime Video saw an uplift in reach during the week of December 15th, which included coverage of a round of Premier League fixtures. Our emerging SVOD content-measurement solution also allows us to track the viewing to these matches.



11 PREMIER LEAGUE VIEWING ON AMAZON PRIME VIDEO

Rank	Channel	Title	Average audience (m)
1	ITV	Coronation Street (7:30pm)	5.80
2	BBC One	BBC News at Six	5.26
3	ITV	Emmerdale	4.95
4	ITV	Coronation Street (8:30pm)	4.87
5	ITV	The Chase	4.38

18	BBC One	BBC News Special	2.14
19	BBC One	Antiques Road Trip	2.09
20	ITV	ITV News at Ten	2.01
21	BBC 2	Our Dementia Choir with Vicky McClure	1.91
22	Prime Video	Liverpool vs Tottenham Hotspur	1.82

129	Prime Video	Arsenal vs Southampton	0.28
182	Prime Video	West Ham United vs Crystal Palace	0.21

Source: BARB. Individuals 4+. Kantar test data based on Live and same-day viewing from December 16th 2020

AUDIENCES FOR AMAZON PRIME VIDEO COVERAGE OF PREMIER LEAGUE GAMES ARE COMPARABLE TO THOSE FOR MATCHES SHOWN ON OTHER PLATFORMS

The leading fixture of the round was Liverpool’s 2-1 win over Tottenham Hotspur on December 16th, which achieved an average audience of 1.82m, ranking it just outside the top 20 broadcasts of that day on all linear channels.

As all audience data are compiled from the same representative panel, the figures for Amazon Prime Video can be compared directly to the broadcasts of fixtures on other channels.

Looking at a comparable round of midweek fixtures from January 12th-14th, which were broadcast across Sky Sports and BT Sport, the highest-rated fixture was the match between Burnley and Manchester United, averaging 1.3m viewers. So the Liverpool game on Amazon Prime delivered a higher average audience from a similar kick-off time, although the remaining Amazon Prime games from December were below the level of the January comparatives in similar kick-off slots. ➤

CLOSING THOUGHTS

Perpetual change has been - and will remain - a hallmark of BARB's trusted, always-on measurement of how people watch all forms of television programming.

Having reported on viewing across multiple screens since 2018, BARB already delivers a huge amount of insight to the UK's television and advertising industry on the ways in which people consume content. As the examples in this white paper have shown, this includes a range of data on timeshifted and non-linear viewing, whether via a broadcaster's own on-demand service or via self-recorded catch-up. And soon we will be adding insight into how people are watching SVOD services.

It's widely expected that access to subscription services will continue growing. We wait to see if speculation is true about new market entrants such as Peacock, HBO Max or Paramount+. Thanks to the new measurement capabilities we will launch this year, BARB has the capacity to measure any new services and to maintain continuous development of our audience measurement services.

NOTES ON METHODOLOGY

Over the past year, our research contractor Kantar has been installing a meter on the WiFi routers in the broadband homes on BARB's representative panel of homes. We expect to start reporting data collected from these meters when all eligible broadband homes have been installed; currently we are collecting preliminary data from over 60% of eligible homes.

Some data in this white paper (chart 5) are based on this partial router meter rollout, with data that will use different reporting rules when published – therefore these data should be treated as preliminary only. Other data (charts 6-11) are not yet available as part of our daily reporting. For these reasons this report is being distributed on a limited basis to selected BARB subscribers.

The aggregate data on viewing to SVOD and video-sharing services are collected from router-meters that measure the internet traffic in broadband homes to a BARB-defined list of sites, across all devices. The use of these meters also has other benefits, such as allowing BARB to measure whether viewing on a TV set is via linear playback or via an on-demand service. They also allow the collection of data from a wider range of devices, and for demographic information on smartphone viewing to be measured. The data are expected to be ready for daily release in Q3 2021.

The SVOD programme performance in this report is based on a content-measurement solution BARB has commissioned from Kantar. This works by matching audio-signatures taken from TV sets with a reference database, in a similar way to the method already used for TV programmes. We are aiming to have over 20,000 hours of content available for measurement across Netflix, Amazon Prime Video and Disney+ when data are released in Q3 2021. This solution measures viewing on TV sets only. 🏠