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This time, it's personal

An international perspective on audience streaming trends

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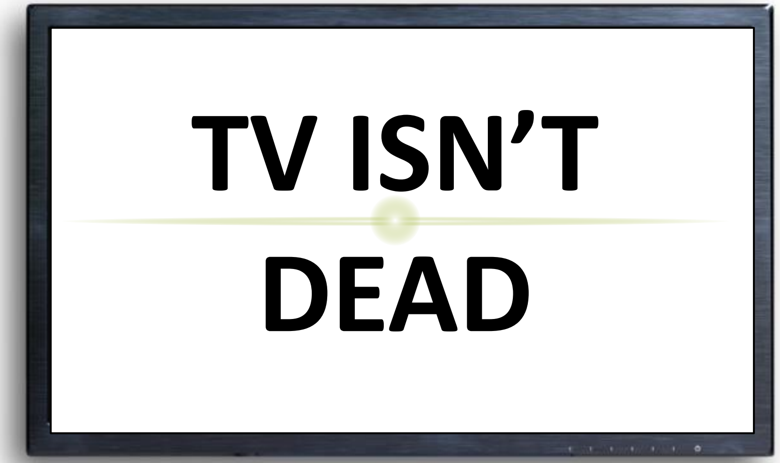
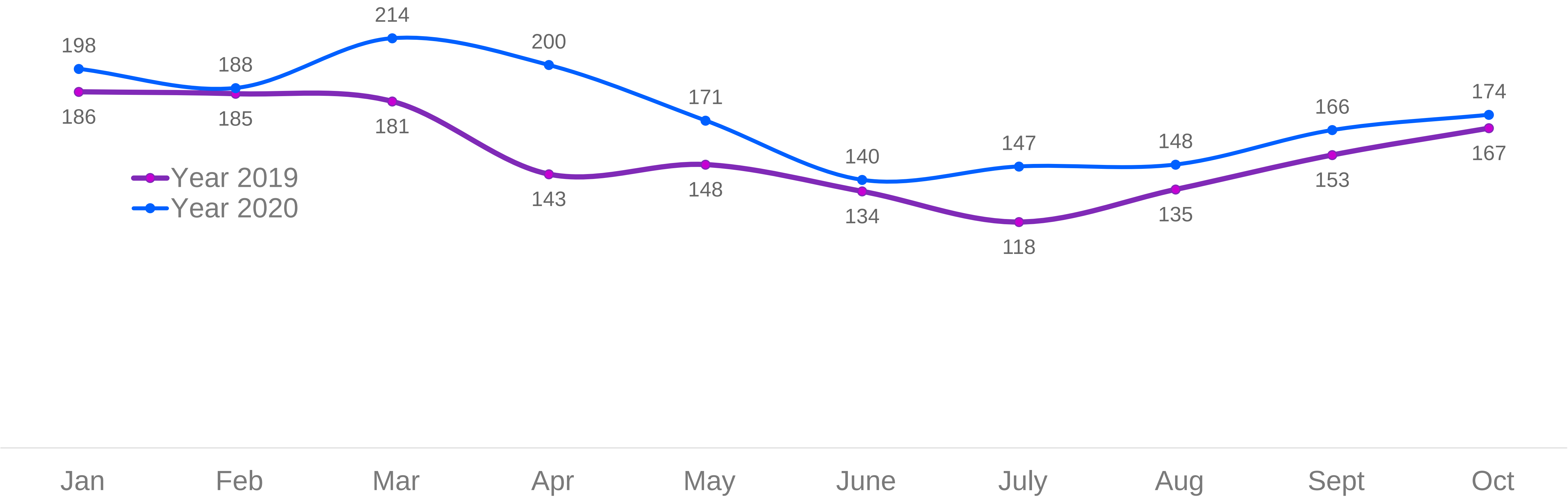
3 November 2020



It's just having babies

TV's children are growing up fast!

6% increase in total viewing time YTD - first time since 2009!



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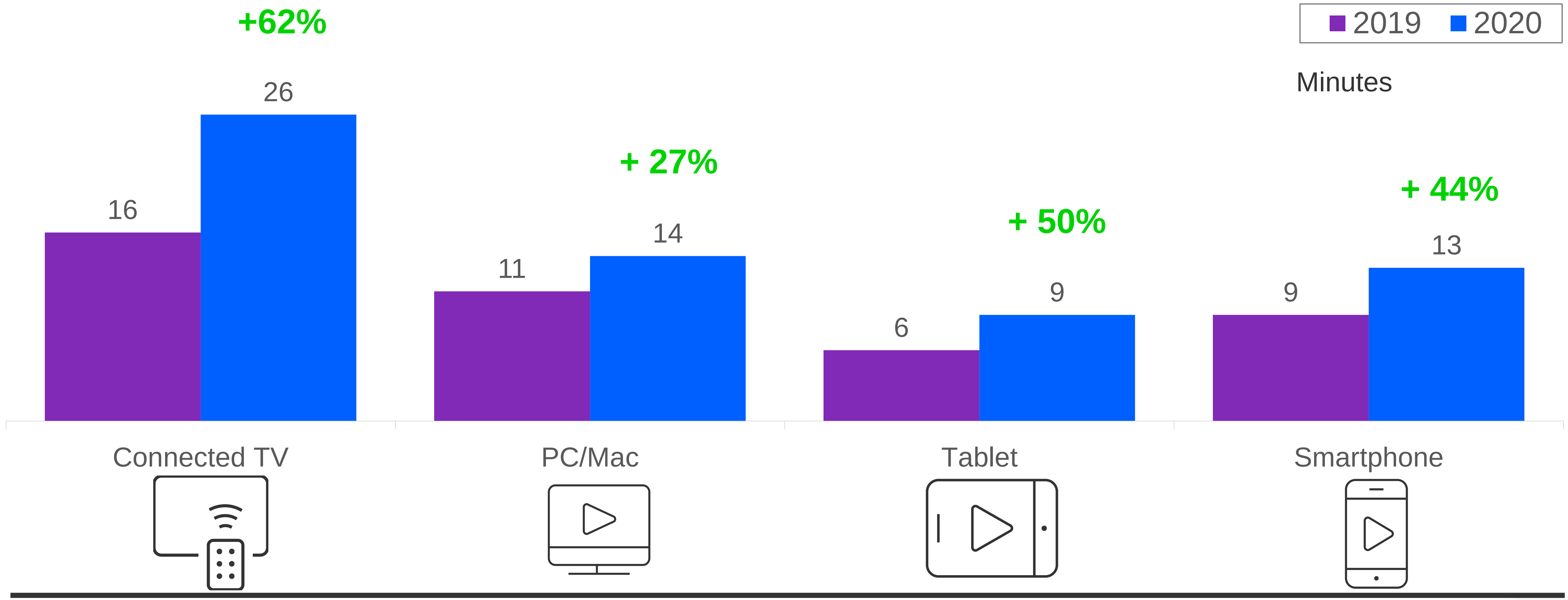
Source: TVOV Norway (Audience 10-79 years).
Daily viewing time (minutes) for linear TV, BVOD (NRK TV, TV2 Sumo, Dplay, Viaplay) and VOD (Netflix, HBO & YouTube).

The importance of true understanding of how people use different content on different screens

Huge increase for all screens



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Source: TVOV Norway (Audience 10-79 years).
VOD daily viewing time (minutes) – online Jan-Sept 2020 vs 2019

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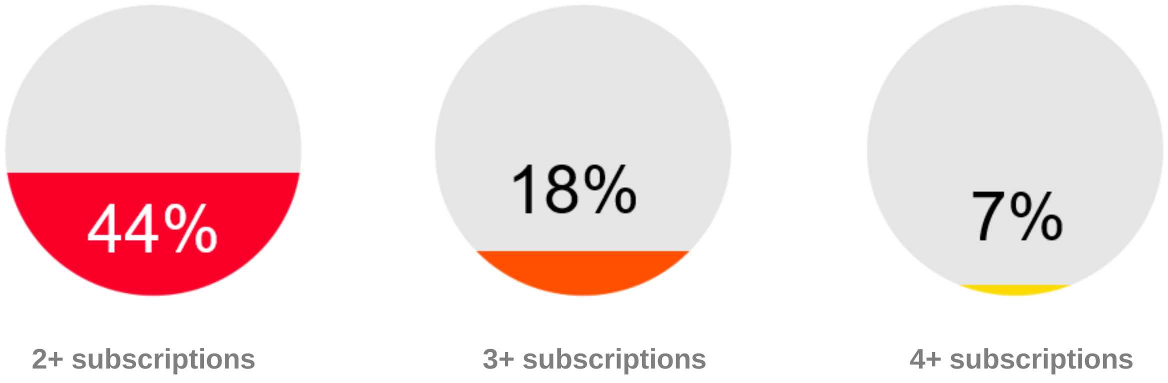
TV’s children are growing up, and the economic dynamics aren’t getting easier

59% of connected consumers claim to be able to access a subscription service, paid or not, on online TV or video. *

But **pockets aren’t bottomless****



- Base: 5,000 connected consumers (access a subscription service on online TV or video). Base: 2,879 connected consumers (reasons for subscribing). Source: Kantar DIMENSION study 2019 - Dimension Total Fieldwork being based on 5 countries [UK, USA, France, Brazil, China]

** Base: 18,672 connected consumers who pay for an online streaming service. Source: Kantar TGI Global Quick View, 2019

How is streaming data delivering value?

Securing sport content rights delivers real value as broadcasters strengthen their hybrid business models

Wider business model churn, CRM etc




	Everton v Brighton 4-2 Sat 3 October 2020	Leeds v Man City 1-1 Sat 3 October	Man U v Tottenham 1-6 Sun 4 October	Villa v Liverpool 7-2 Sun 4 October
Broadcast Monthly pay	**21,100**	26,200	46,400	48,300
TV2 App TV2 Sumo	**7,100**	12,100	35,700	17,900
Total audience	**28,200**	38,300	82,100	66,300

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Source: TVOV Norway (Audience 10-79 years) week 40 2020. Rating

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Securing sport content rights is a competitive market

As sports broadcasting rights continue to fragment, how many subscriptions can audiences afford?

Everton v Brighton
Sat 3 October 2020
15:00

673,000
(avg)

6.13%
of total TV

Leeds v Man City
Sat 3 October 2020
17:30

1,650,600
(avg)

10.34%
of total TV

Man U v Tottenham
Sun 4 October 2020
16:30

2,198,700
(avg)

14.75%
of total TV

Villa v Liverpool
Sun 4 October 2020
19:15

2,083,400
(avg)

9.77%
of total TV

Leicester v Liverpool
26 December 2019

7%
of total TV and
unidentified viewing
(20:00-21:59)

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Av Audience (000's) & Audience share (%) - Target All 4+
Source: BARB /TechEdge Live+7days
Cumulative totals across Sky Sports Main Event & Sky Sport Premier League SKY Channels

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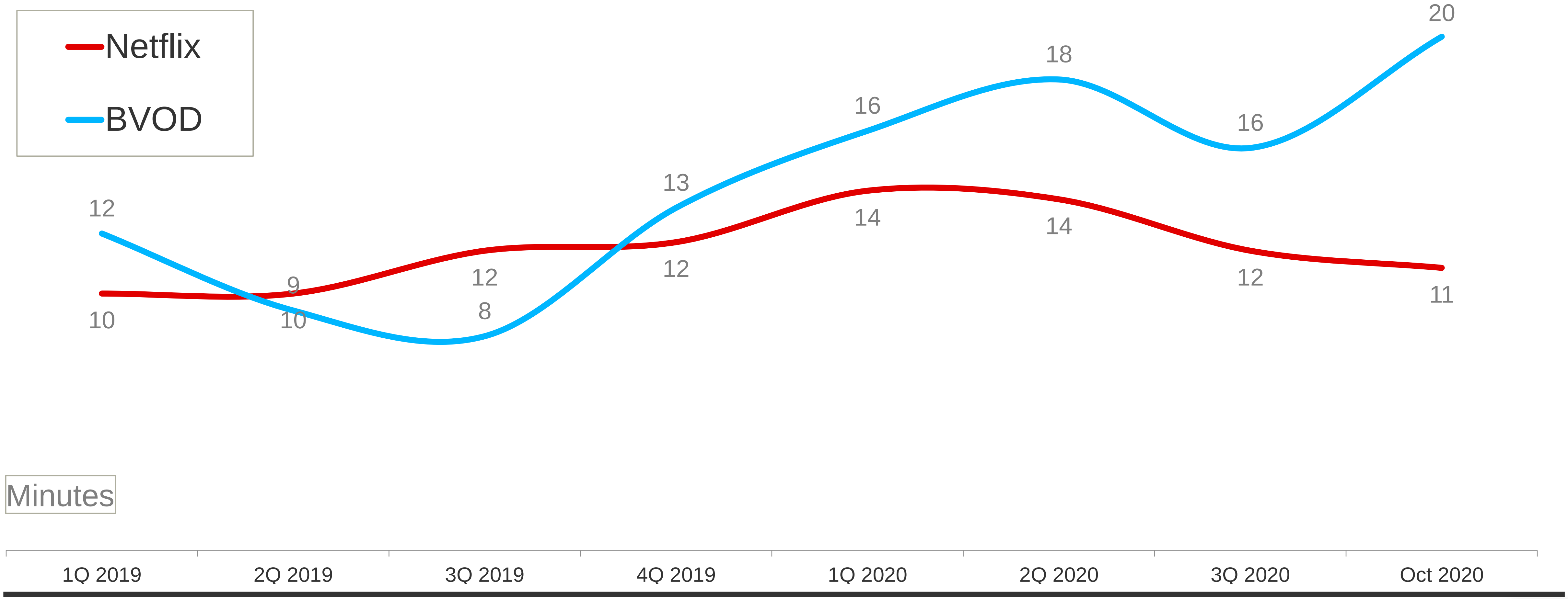
The broadcasters strike back

Daily viewing time 2019-2020



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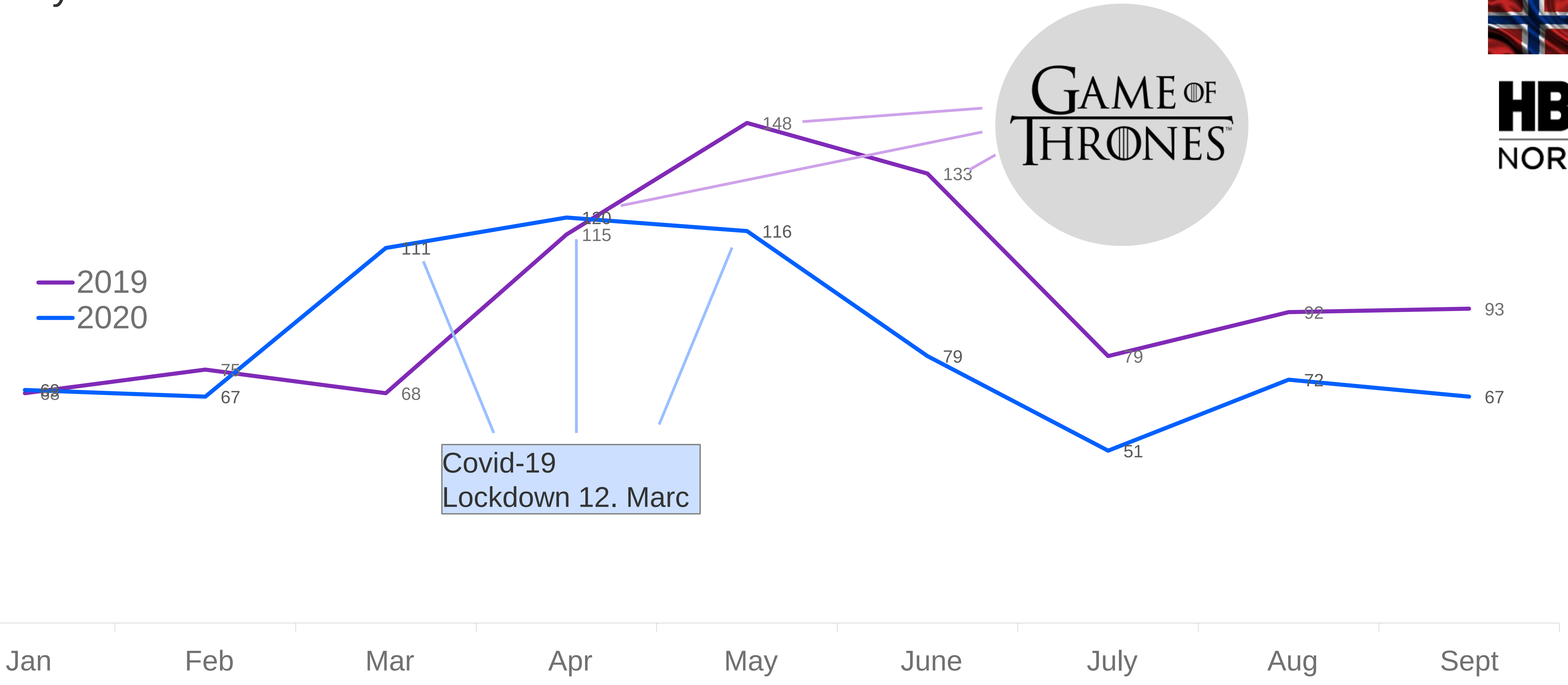
Securing and retaining content inventory is as important as keeping subscribers

Daily reach 2019-2020 for HBO Nordic



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Source: TVOV Norway. Average daily reach number in thousands.
Audience 10-79 years. VOD viewing.

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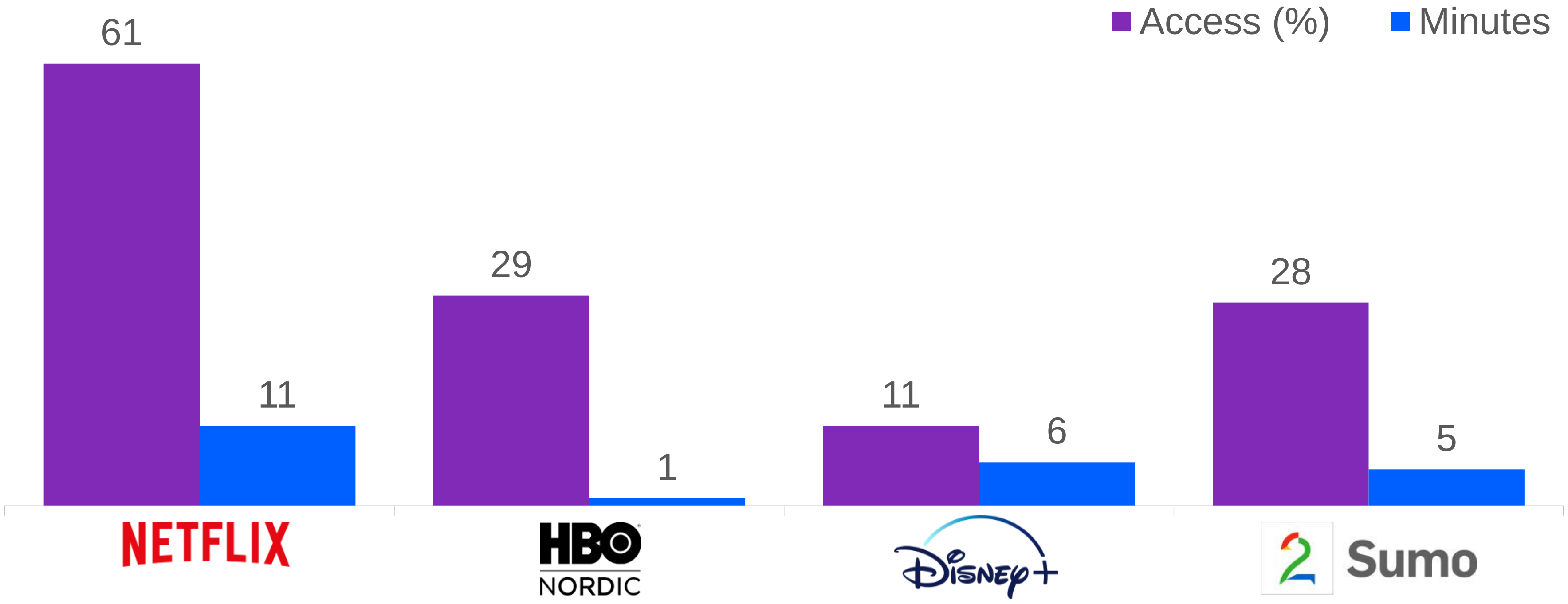
Viewing data gives valuable insight for pricing and churn

Subscription (access) and minutes used of SVOD



	Netflix	HBO Nordic	Disney+	Sumo
Index	17 (11/62)	3 (1/29)	55 (6/11)	18 (5/28)
Monthly subscription	€10	€10	€6	€50 (Premier League)

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Source: TVOV Norway. Average daily minutes among the whole population 2-79 years 28.09-22.10. Subscription from the TV equipment survey end of September 2020.

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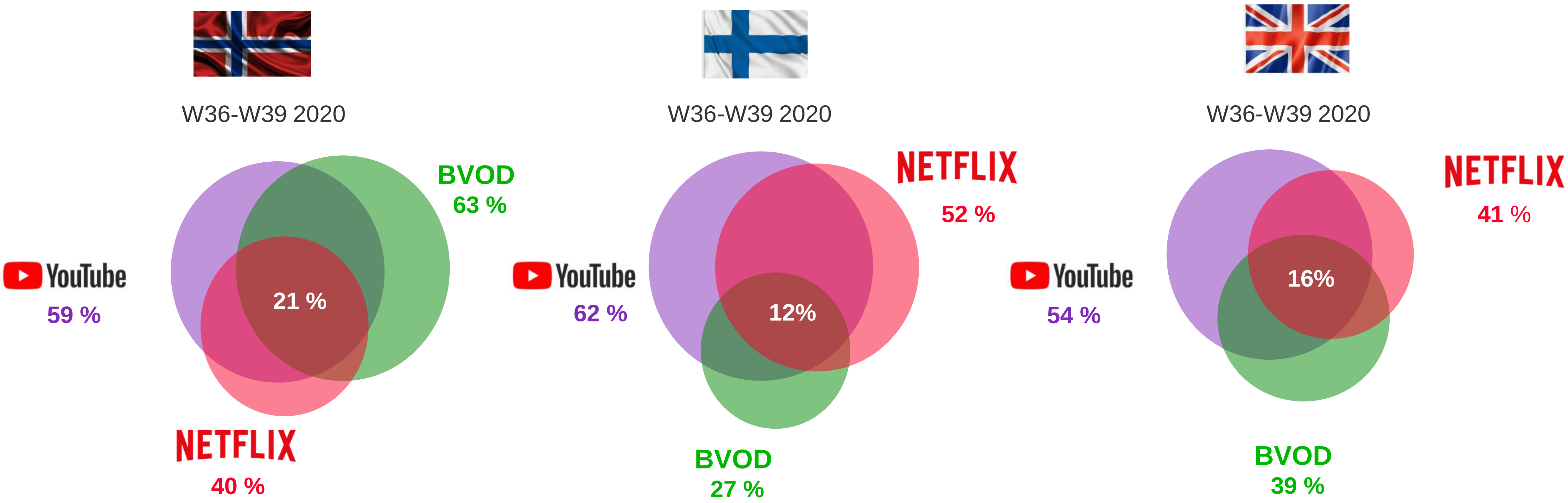
Competition for content is intensifying the battle for audience share

Average weekly reach (%), September 2020 - Individuals 20-49 years



Source: TVOV Kantar

Source: Finnpanel

Source: BARB panel*

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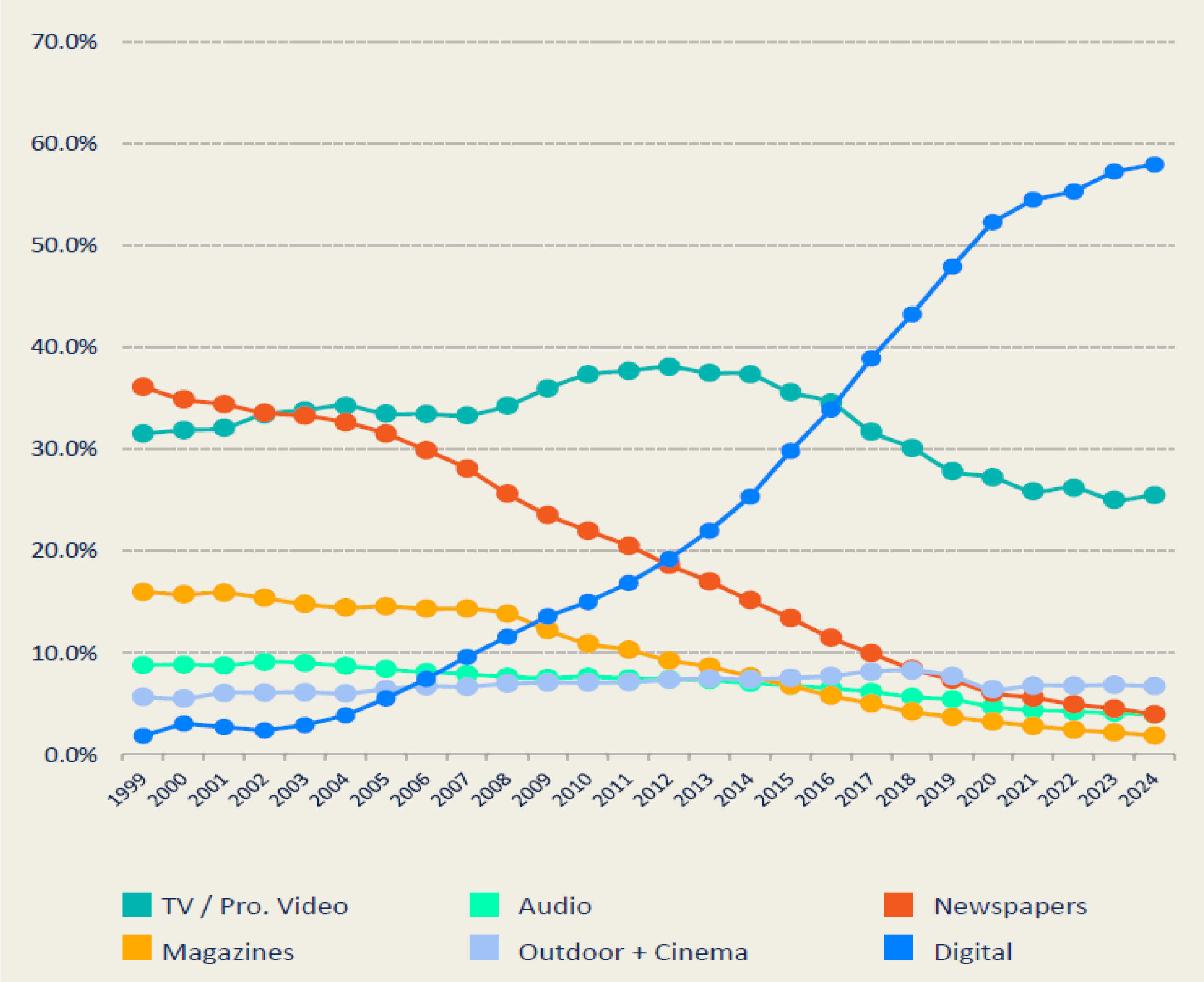
* Data from sub-set of BARB panel (Focal Meter roll-out underway). Sample: 1,324 A20-49. Includes whitelisted BVOD (BBC, ITV, Ch5, UKTV) and tagged BVOD on all screens, as well as audio matched BVOD via the TV where audio references are in place. TV, Smartphone, PC and tablet data for SVOD

How are advertisers – and the disruptors - responding?



Advertising spend on US national TV
January-July 2020 vs 2019

prime video	+63%
NETFLIX	-54%
hulu	+143%

SOURCE: GroupM – TYNY - the global mid-year report - June 2020 *includes digital extensions in traditional media categories)*
ADEX DATA SOURCE – Calculation based on Kantar USA Advertising spend on national TV (TBC) Jan-July 2020 vs same period 2019

All content providers will find richer value in a total view of their audience.

- We must take measurement across all screens and platforms seriously to understand viewer migrations.
- Media trading currencies must reflect the reality and totality of audience behaviour.
- As media companies move streaming to the heart of their growth strategy, content providers and platforms must work together in response to changing audience behaviour to ensure media planning and buying is based on the totality of the audience.

"One accurate measurement is worth a thousand expert opinions."

Grace Hopper