



# Is That a Connected TV in Your Pocket?

FACT PACK  
BROADCASTER VOD  
EDITION JAN-JUN 18

think 

# Broadcaster VOD: Live Streaming and On-Demand

Today's TV is everywhere; on the train, in your bed and even in your pocket. This BVOD Edition of ThinkTV's Bi-Annual Fact Pack takes a deep look into the rapid growth of TV anywhere, anytime.

To help advertisers and agencies understand how we TV and when we BVOD, ThinkTV has created a Fact Pack with all the stats you need to talk like a boss; anywhere, anytime.







# Never miss a minute

The popularity of BVOD has increased dramatically in the last year, driving strong growth that is undoubtedly due to the sheer convenience of being able to watch your favourite TV, anywhere, any time.

Playing on 4 screens and counting, TV is more accessible than ever before.

And Australians have ever more reasons to love the Big Tellie in the lounge room, with Connected TVs forming the beating heart of family entertainment in close to 50% of Australian households driving viewing on all connected devices up 76% in the first half of 2018.

Whether it's broadcast on mobiles, tablets, PCs or Connected TVs, OzTAM has the measure of viewers, bringing independent, audited, trustworthy viewing data that you need to make smart decisions about where to spend your advertising dollars.

So sit back and relax, and read all about the exploding world of broadcaster video on demand.

# TV AND ITS BABIES

## Television Viewing

When

Live  
(In-home Linear & Streaming)

On-Demand  
(Playback & VOD)

How

In-home Linear

Live Stream

Record & Playback

Broadcaster VOD

Screen

TV

Connected  
TV

Connected  
TV

Mobile

Tablet

PC

TV

Connected  
TV

Connected  
TV

Mobile

Tablet

PC

Device



# THE BVOD-o-SPHERE



# HOW DOES BVOD MEASURE UP?

**OzTAM measures and reports more than one hundred digital free-to-air and subscription channels both live and playback up to 28 days from original broadcast.**

Over the years OzTAM's panel has evolved to account for the ever-changing characteristics of Australian households and their adoption of new technologies.

To capture accurately and measure BVOD, OzTAM's service also includes the Video Player Measurement (VPM) Metric.

**OzTAM's VPM service captures all online video content streamed live or played on-demand from participating broadcasters' video players.**

These broadcasters currently include ABC, Seven Network, Nine, Network Ten, SBS and Foxtel.

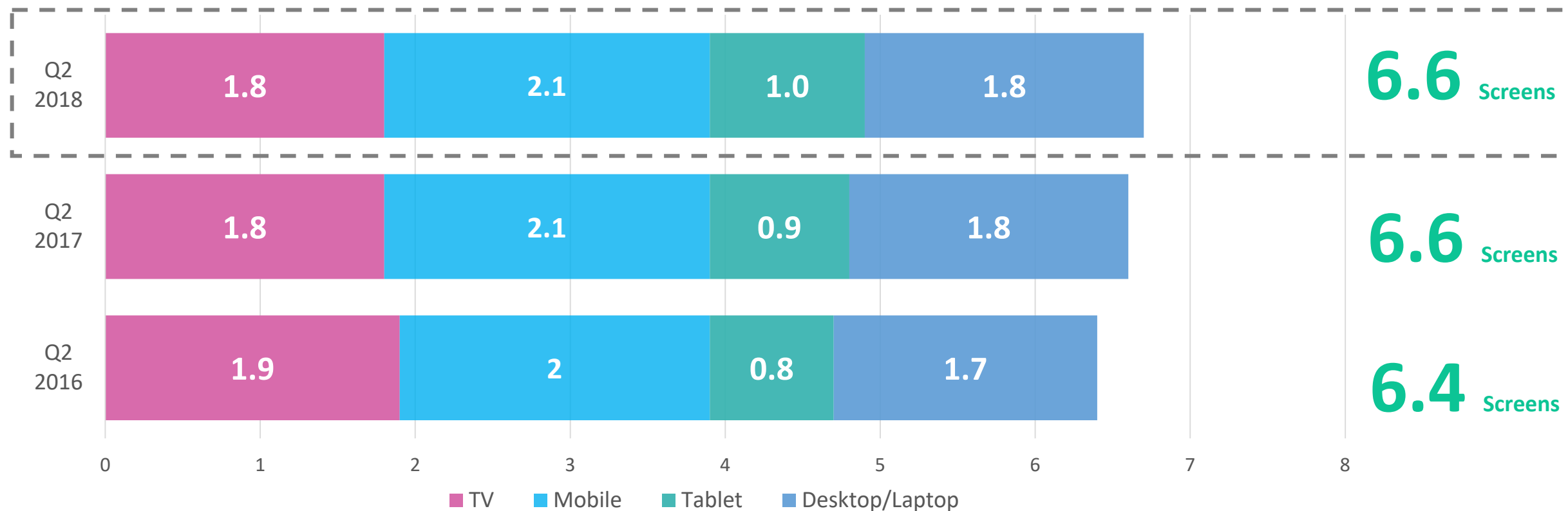
## OzTAM's VPM

- captures census level data on exactly what content is being played on connected devices;
- delivers metrics consistent across online video player services;
- measures actual video player activity;
- is accurate, transparent and independently verifiable; and
- uses terminology consistent with well-understood TV terms and definitions.

# THE SCREEN SCENE

The growth in the number of screens in the Australian home is a key enabler of changing audience behaviour. The majority of these screens are internet capable and many are also portable. Proliferation of screens has created new viewing opportunities in home and on the go.

## SCREENS IN AUSTRALIAN HOMES





# LOTSAS SCREENS, LOTSAS VIEWING



OzTAM's VPM data showed that across April to June 2018 a monthly average of **12 million unique devices** connected to Broadcaster VOD Services.

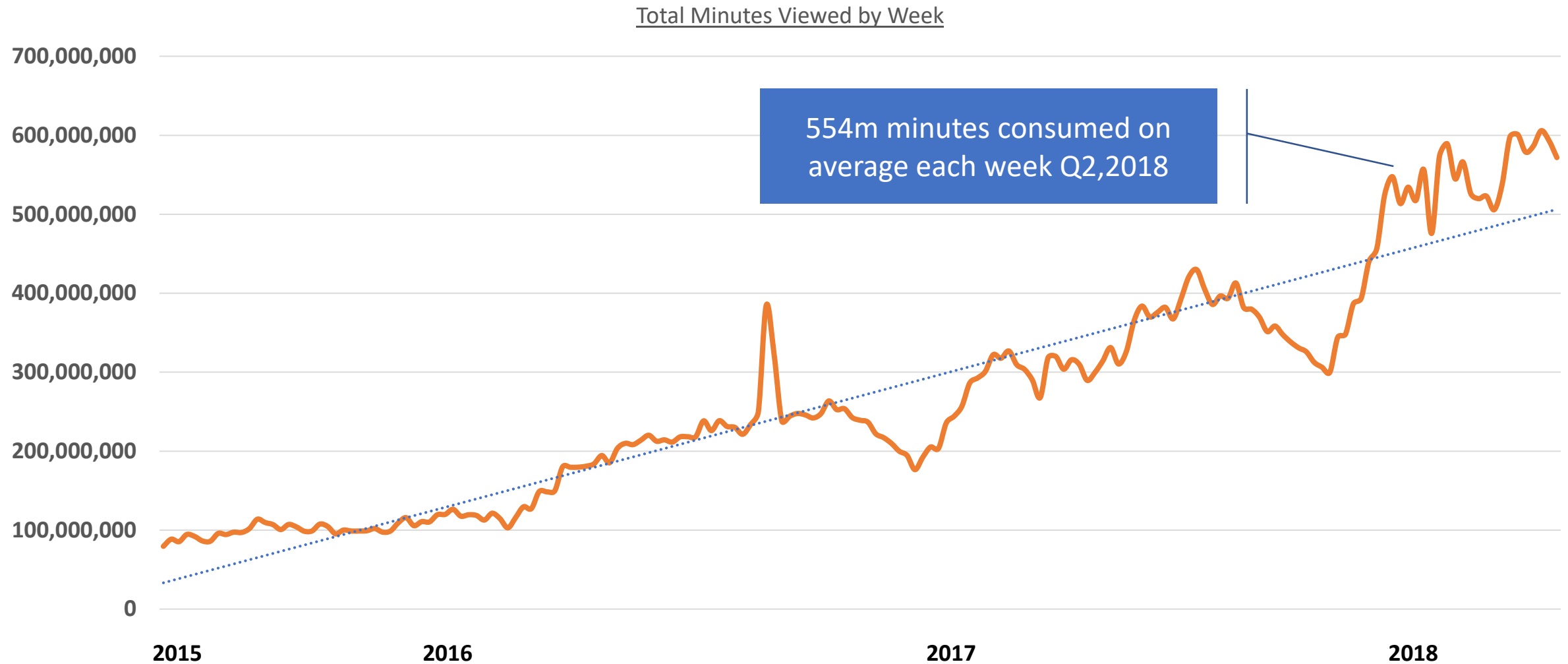
If you consider that there are around 10 million households in Australia, that means **multiple screens per home connected** and consumed...

**...554 million minutes** of content on average each week with **31% from live streaming** and **69% from VOD**

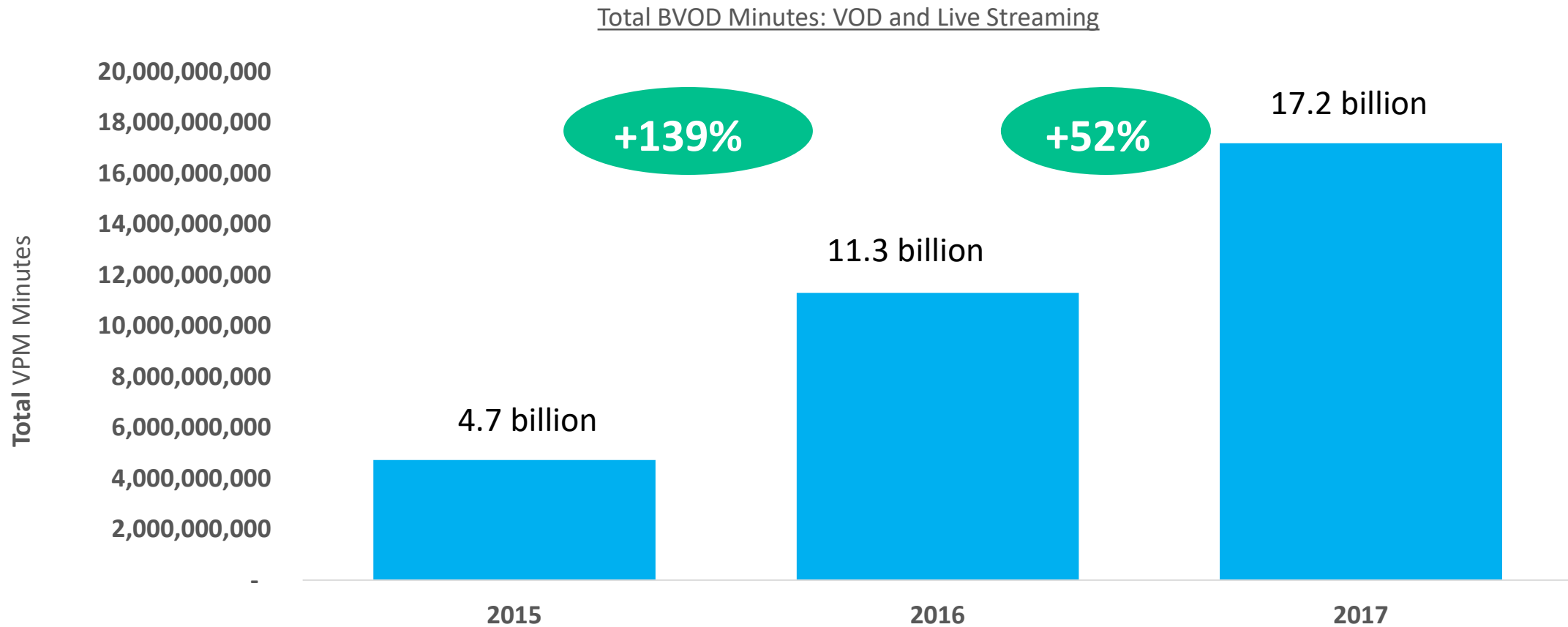
Which makes up **around 2% of all Total TV consumed each week.**



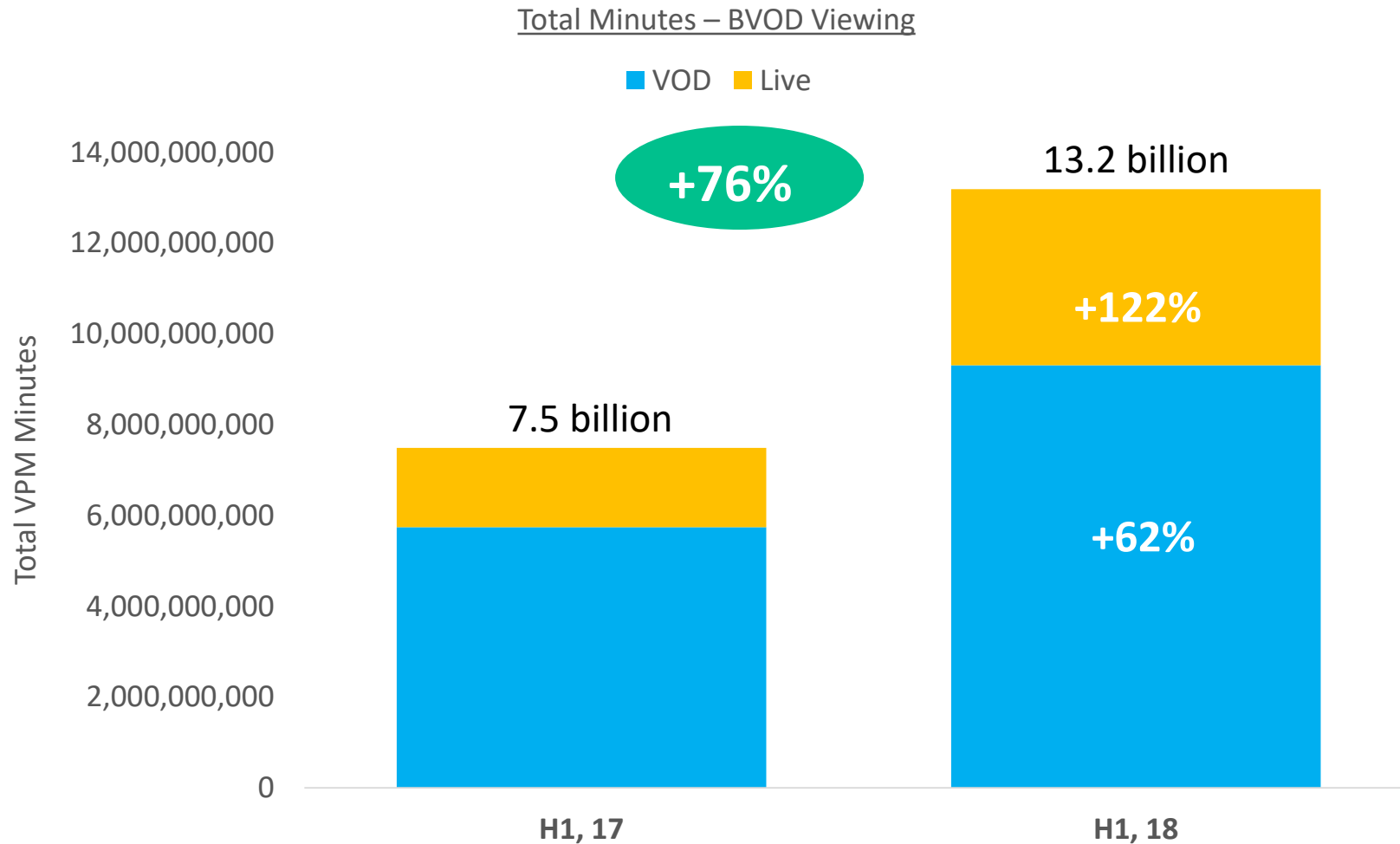
# BROADCASTER VOD CONTINUES TO GROW



# BVOD GREW 52% YEAR ON YEAR IN 2017



# 2018 IS ON TRACK TO SMASH 2017 VIEWING LEVELS



Viewing is up **76%** on the same period last year.

Technological advances and the rise of connected TVs, together with the increased popularity of watching whenever and wherever is most convenient, will only drive further BVOD growth.

# WHY IS BVOD SO SPECIAL?

## 1. ALWAYS FULL SCREEN AND USUALLY THE BIG SCREEN:

All BVOD players default to full-screen on tablets, mobiles, TVs and on over-the-top players such as Apple TV as soon as the play button is pressed - collectively that accounts for more than 80% of BVOD viewing. On computer-based browsers, which account for less than 20% of viewing, BVOD players default to a large proportion of the screen and many viewers make one click to trigger the player to play full-screen.

## 2. BVOD IS PROFESSIONALLY PRODUCED CONTENT

Not all video is equal. Different types of video exist along a quality spectrum. Knowing what content your ad is placed next to is crucial for both advertising effectiveness and brand safety. Right at the high-quality, highly-trusted end of the spectrum are the Broadcaster VOD (BVOD) services. And that is great news for advertisers.

## 3. BVOD IS THE MOST BRAND SAFE FORM OF VOD

There's no rubbing shoulders with inappropriate content in the world of BVOD; no accidentally funding activities you wouldn't want your brand to fund. And in BVOD, people are choosing to watch a TV programme, so they are relaxed and have the time to watch your ads – and indeed expect to find them.



# WHY IS BVOD SO SPECIAL?

## 4. VIEW THROUGH RATE AND VALUE EXCHANGE

A high proportion of BVOD advertising is watched from start to finish, this reflects the fact that viewers are happy to watch ads in exchange for great content they desire to watch.

## 5. HIGHLY ENGAGED VIEWERS

BVOD viewing is a special indulgent treat for viewers. BVOD viewers are highly engaged as they are catching up on their favourite shows at a time and place that is convenient for them.

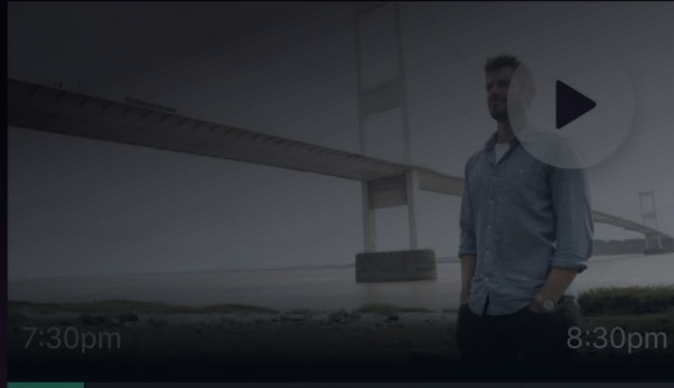
## 6. HIGHLY ADVANCED AD SOLUTIONS

The different BVOD offerings provide a suite of advanced advertising solutions spanning interactivity, personalisation, audience, genre and interest group targeting, as well as programmatic opportunities. The rise of live streaming and the rapid growth of connected TVs are both helping to enable addressable TV.

## 7. FIRST PARTY DATA

Many of BVOD's advanced advertising solutions are fuelled by high quality first party data – that is, highly reliable data that the broadcasters have collected themselves from willing users, not purchased from a third party.

## Live TV



 **SBS** World's Greatest Bri...




 **My Kitchen Rules**

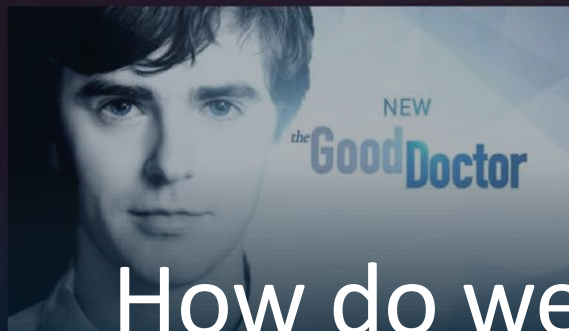


 **Twenty/20 - Australi...**



 **I'm a Celebrity**

## Favourites



How do we BVOD?

 **The Good Doctor**



 **Married at First Sight**



 **Gogglebox Australia**



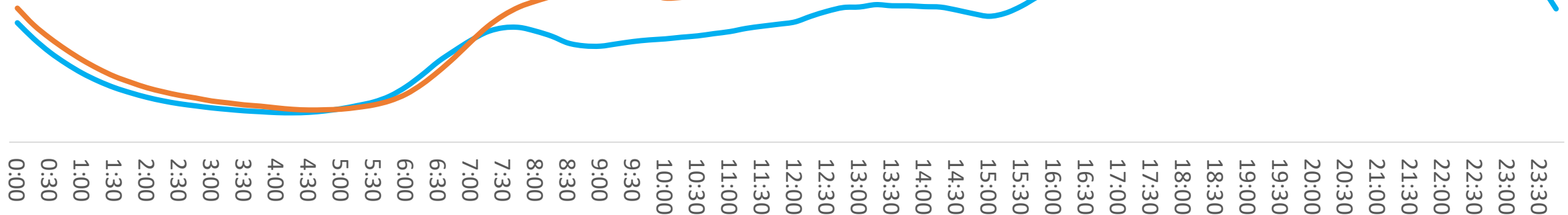
**think** 

# WE BVOD JUST LIKE LINEAR TV

Shape of the BVOD Day – VOD and Live Stream Viewing, 4 Week Average

— wkday — wkend

BVOD consumption peaks a little later than linear viewing, with a decent dose of daytime VOD across the weekend

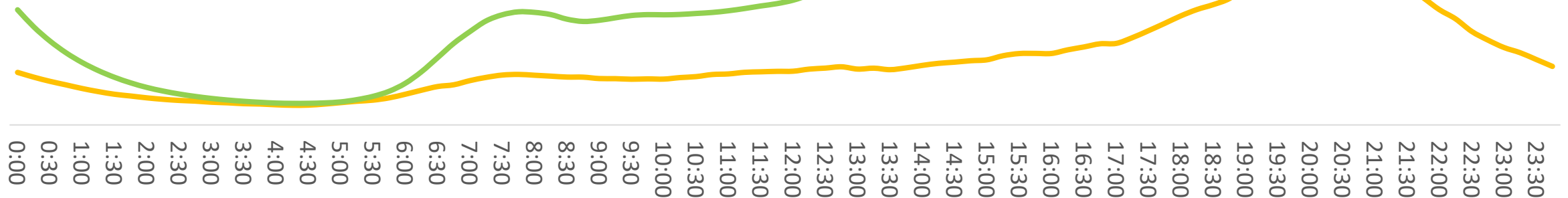


# BVOD IS THE SECOND COMING OF PRIME-TIME

Shape of the BVOD Day – VOD and Live Stream, 4 Week Average

LIVE VOD

A closer look at viewing type highlights the later peak of VOD viewing. Live linear prime-time shows take viewing precedence earlier in the evening, with viewers further increasing their on-demand viewing from around 9pm

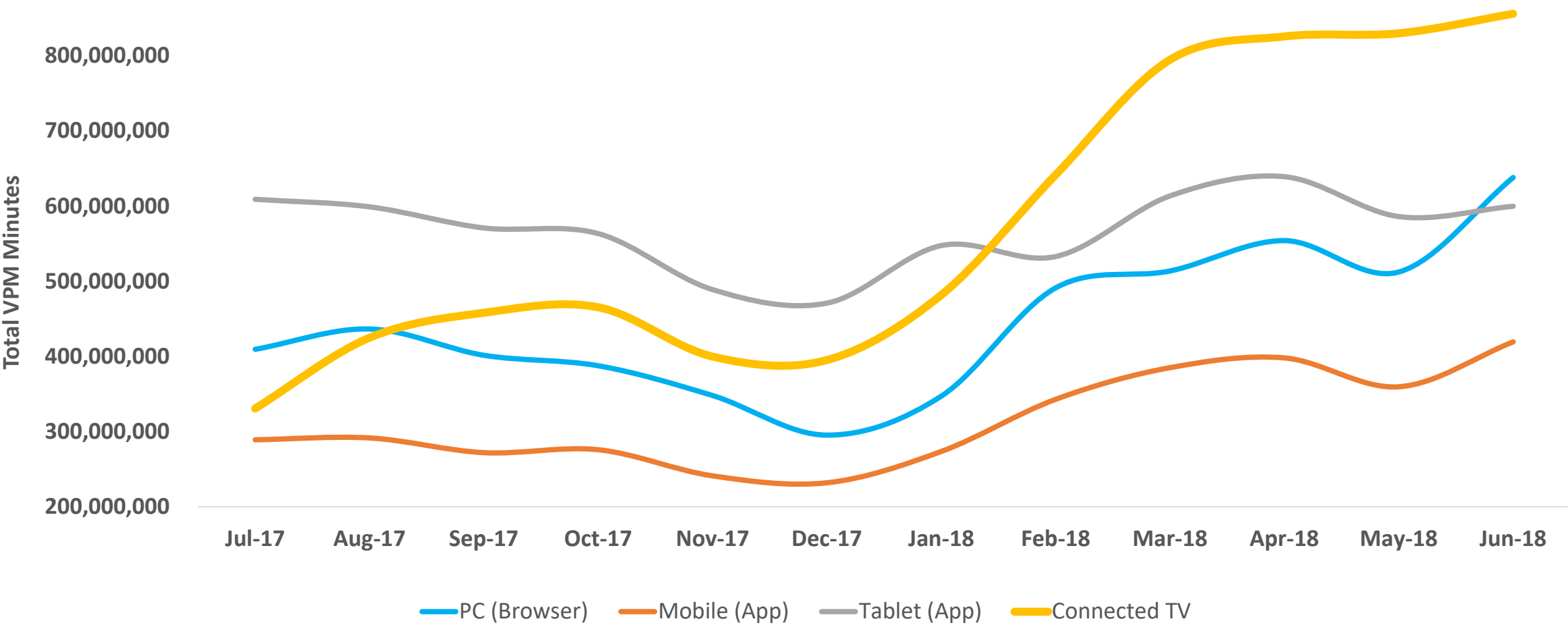




# CONNECTED TV USAGE IS DRIVING GROWTH OF BVOD



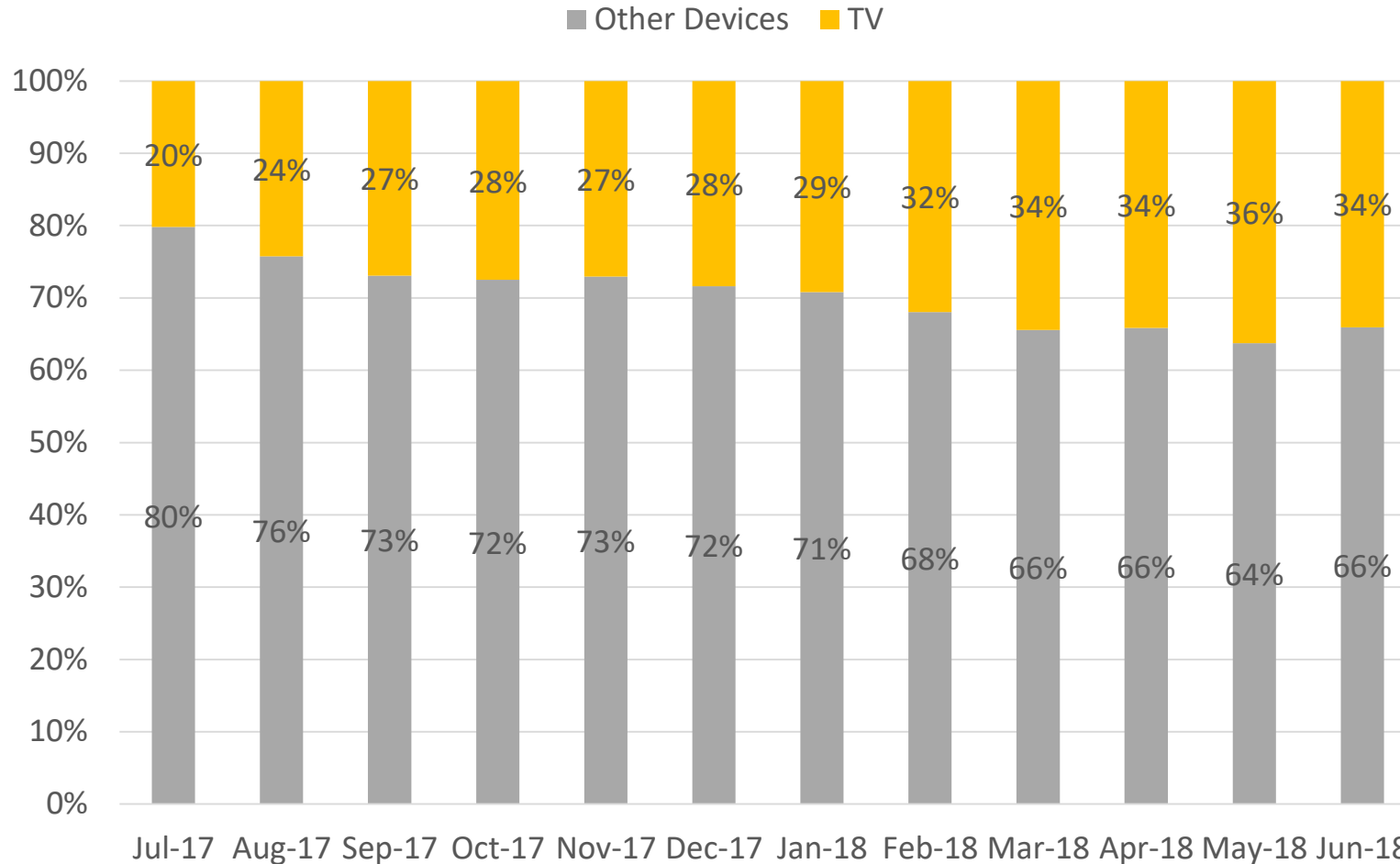
The evolution of broadcast video viewing, by month by device



Source: OzTAM Video Player Measurement (VPM), Total BVOD and Live Stream minutes, July 2017 to June 2018

# THE CONNECTED TV SCREEN IS NOW THE DOMINANT SCREEN FOR ONLINE VIEWING

Total BVOD: VOD and LIVE VPM Minutes, share by device



The TV set is still the screen of choice when catching up with online content, and this is set to continue.

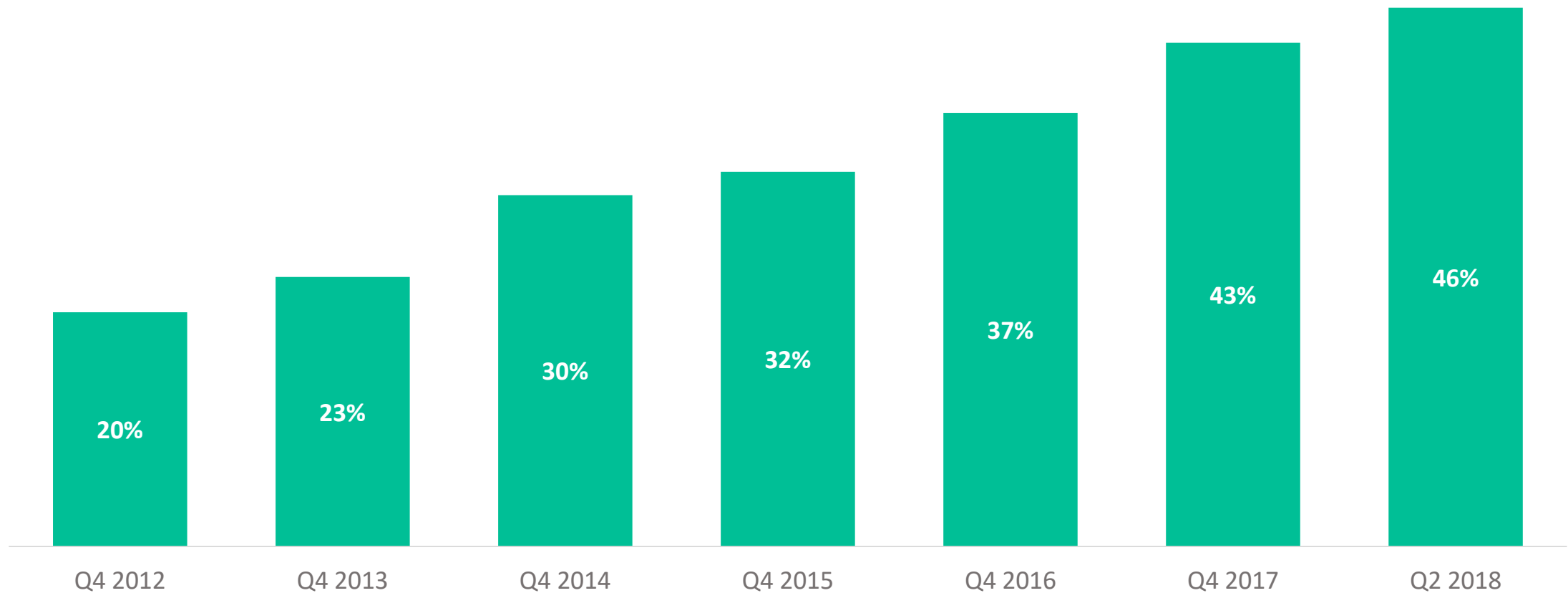
Viewers will always choose the “best and biggest screen” to watch content.

The TV set still plays an important role in the Australian home and content distribution.

# DEMAND FOR CONNECTED TV IS STRONG

Penetration of Connected TVs has doubled in the past five years. Consumers are increasingly using Broadcaster VOD apps and websites to access TV content.

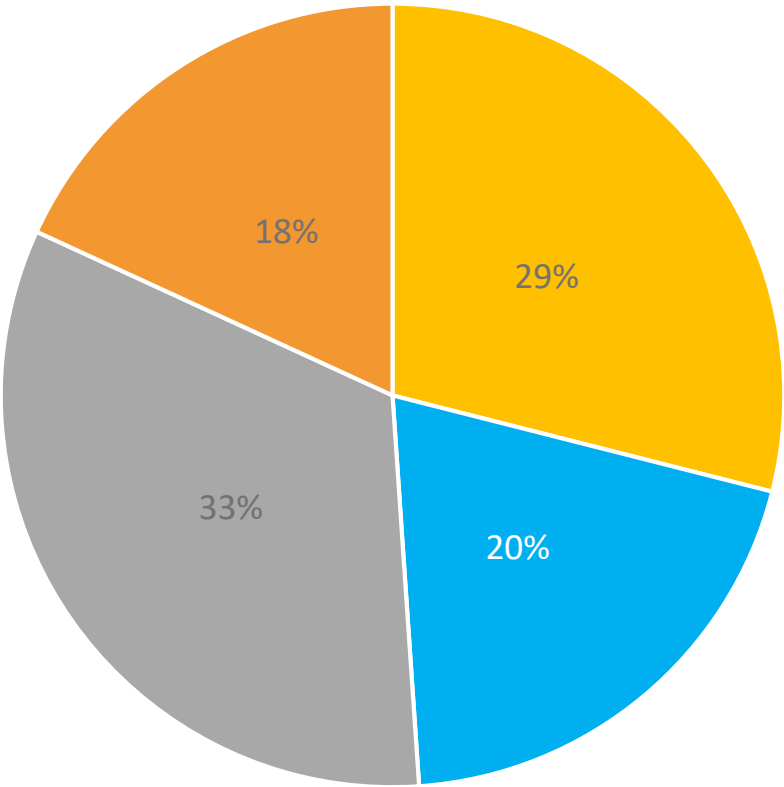
Connected TV Penetration Growth 2012-2018ytd



# CONNECTED TV IS USED FOR BOTH VOD AND LIVE STREAMING

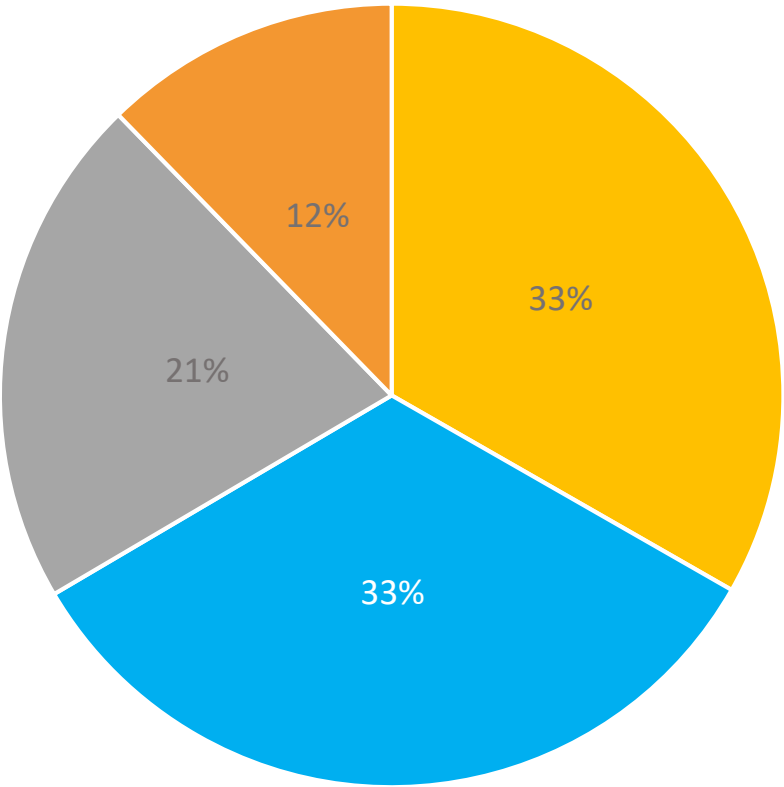


VOD VPM Share %



■ TV ■ Desktop ■ Tablet ■ Phone

LIVE Stream VPM Share %

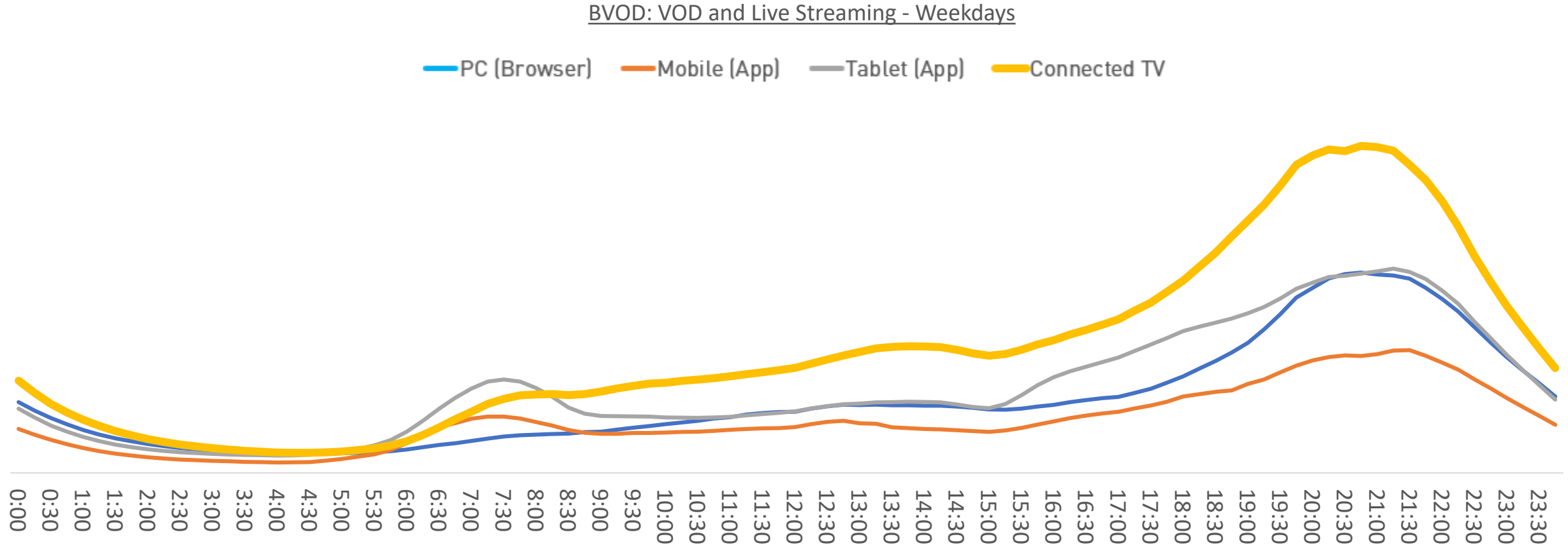


■ TV ■ Desktop ■ Tablet ■ Phone

Source: OzTAM Video Player Measurement (VPM), , Total BVOD minutes share by device, Average over July 2017 to June 2018



# TV SCREEN USAGE IS SIMILAR WHETHER IT'S ON CONNECTED OR NON-CONNECTED TV

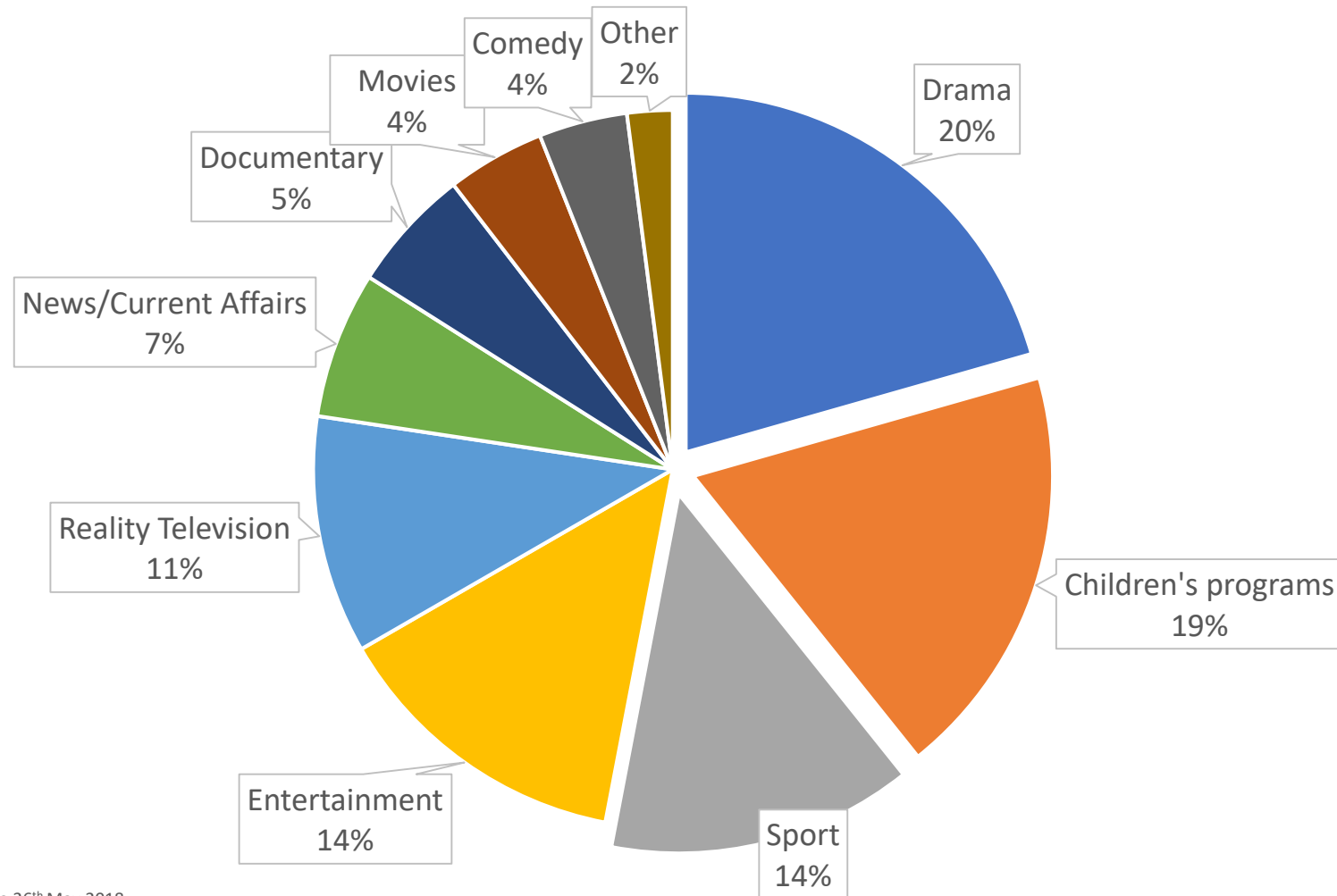


A woman with dark hair is lying in bed, propped up on white pillows. She is holding a tablet computer with both hands and looking at the screen. The room is dimly lit, with a patterned headboard visible in the background. The overall tone of the image is blue and serene.





















What do we BVOD?

# MORE THAN HALF BVOD VIEWING IS FROM THREE GENRES

Share of BVOD viewing by genre, 29th April - 26 May 2018



# TOP BVOD SERIES JAN TO JUNE 2018

PROGRAMME			CHANNEL	Total VPM Minutes	PROGRAMME			CHANNEL	Total VPM Minutes
1	Married at First Sight Season 5			552,807,004	11	The Bold and the Beautiful			68,469,251
2	Love Island Australia Season 1			320,183,191	12	Peppa Pig			67,981,961
3	My Kitchen Rules Season 9			300,228,121	13	PJ Masks			67,655,832
4	Bachelor In Paradise			182,374,937	14	The Good Doctor Season 1			64,831,746
5	Home And Away			146,196,242	15	I'm A Celebrity...Get Me Out Of Here!			63,620,210
6	The Handmaid's Tale Season 1			145,592,101	16	Mystery Road			60,370,239
7	MasterChef Australia			139,775,266	17	Harrow			58,082,790
8	House Rules			111,139,568	18	Neighbours			57,827,401
9	The Voice Season 7			106,583,872	19	Bing			55,305,958
10	The Handmaid's Tale Season 2			70,759,680	20	Ben And Holly's Little Kingdom			52,150,940



# TOP BVOD VIEWING STATS



	PROGRAMME	Total BVOD Mins
1	Married at First Sight Season 5	552,807,004
2	Love Island Australia Season 1	320,183,191
3	The Voice Season 7	106,583,872
4	Love Island Season 3	42,416,105
5	Young Sheldon Season 1	39,309,094



	PROGRAMME	Total BVOD Mins
1	My Kitchen Rules Season 9	300,228,121
2	Home And Away	146,196,242
3	House Rules	111,139,568
4	The Good Doctor Season 1	64,831,746
5	The Resident Season 1	46,323,457



	PROGRAMME	Total BVOD Mins
1	Bachelor In Paradise	182,374,937
2	MasterChef Australia	139,775,266
3	The Bold and the Beautiful	68,469,251
4	I'm A Celebrity...Get Me Out Of Here!	63,620,210
5	Neighbours	57,827,401

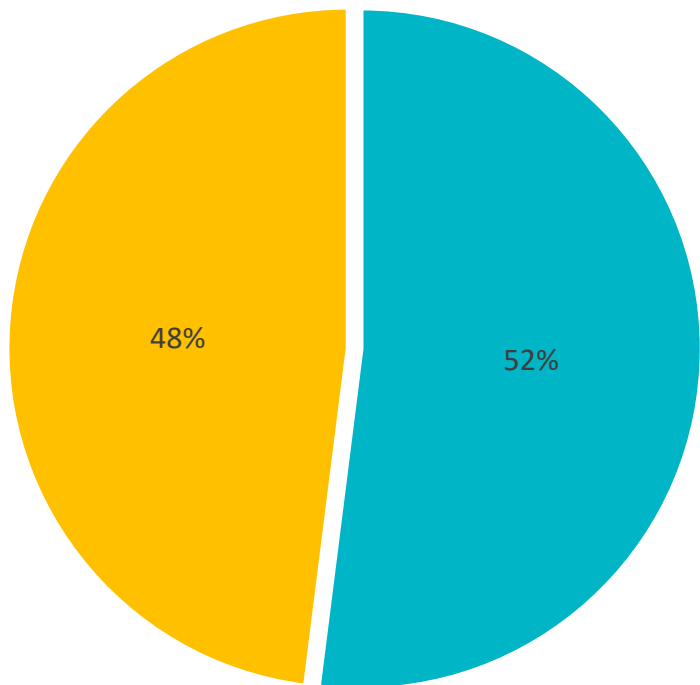


	PROGRAMME	Total BVOD Mins
1	The Walking Dead	25,401,901
2	Westworld Season 2	25,157,119
3	Real Housewives Of Melbourne	21,550,674
4	Westworld Season 1	18,345,667
5	Real Housewives of Beverly Hills	14,860,530

# LOVE ISLAND AND BVOD – A MATCH MADE IN HEAVEN

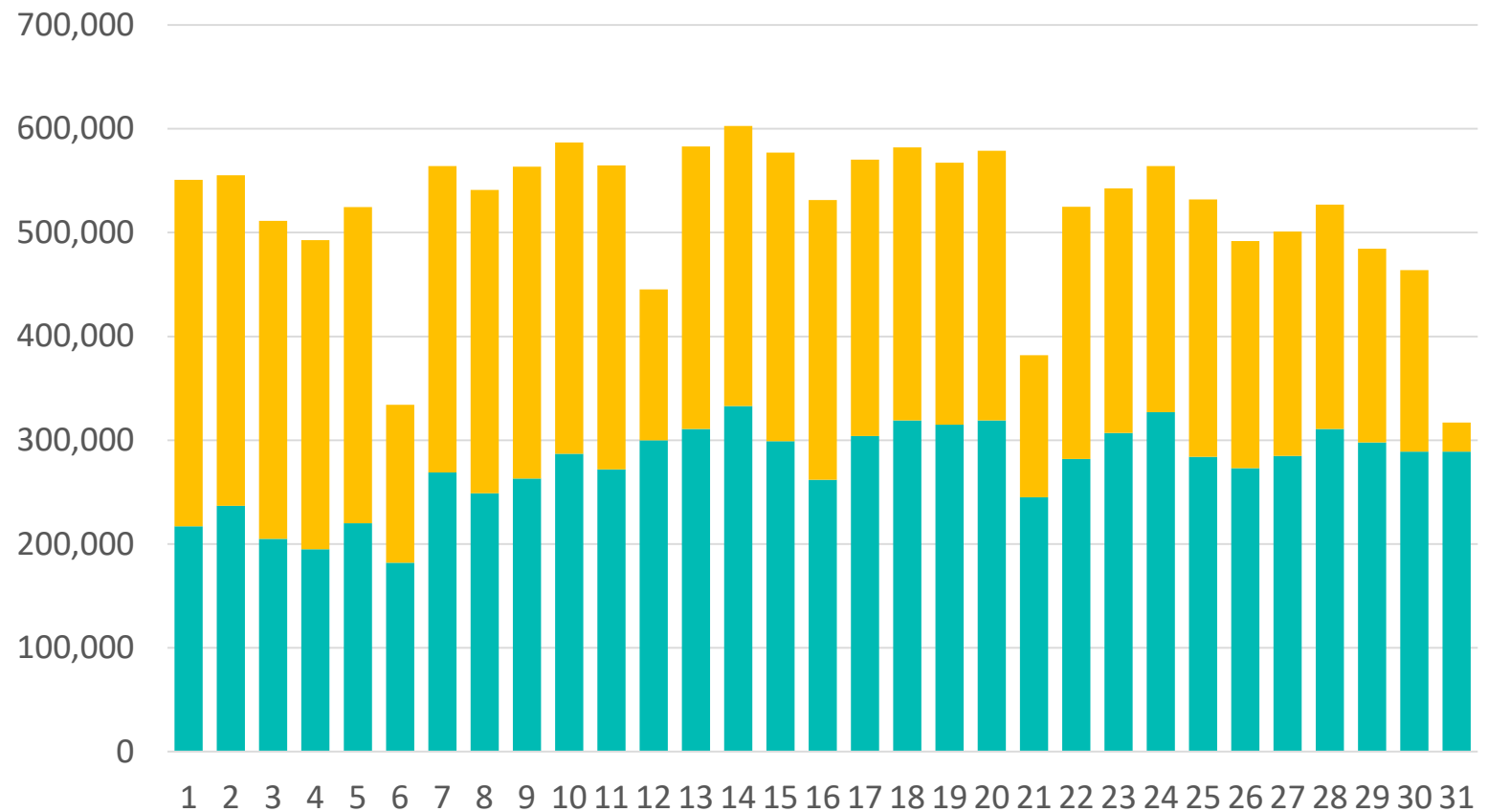
**52%** of Love Island viewing was from Linear TV and **48%** was from BVOD

■ Linear TV ■ BVOD



Love Island Viewing, by Episode

■ TOTAL LINEAR TV ■ TOTAL BVOD



Source: OzTAM Metro and Regional Data , Love Island Australia 2018 ex encores – GO Network. BVOD viewing sourced from OzTAM Video Player Measurement (VPM), Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600



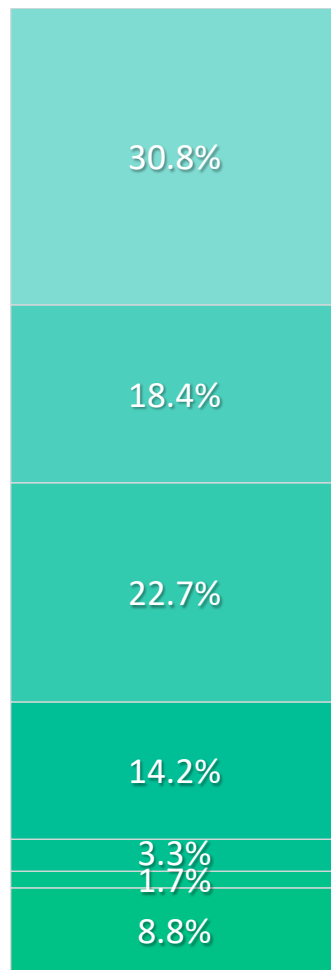
Jan to June 2018

# In-Home Linear TV: Who is watching?

# WHO WATCHES LINEAR TV?

36.9% 25-54s  
28.1% under 40  
71.9% Over 40

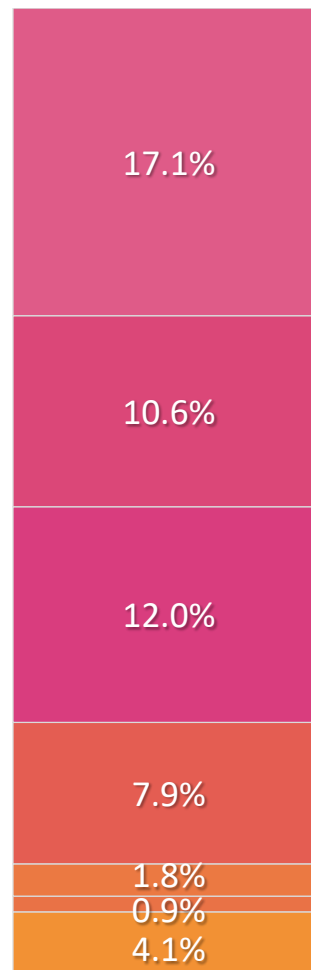
Ppl 65+  
Ppl 55-64  
Ppl 40-54  
Ppl 25-39  
Ppl 18-24  
Ppl 13-17  
Ppl 0-12



All day

19.8% W25-54s  
14.6% W<40

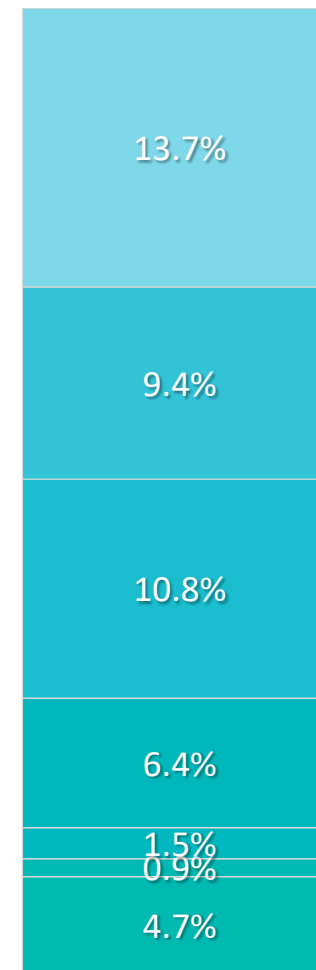
Women 65+  
Women 55-64  
Women 40-54  
Women 25-39  
Women 18-24  
Women 13-17  
Women 0-12



All day

17.1% M25-54s  
13.5% M<40

Men 65+  
Men 55-64  
Men 40-54  
Men 25-39  
Men 18-24  
Men 13-17  
Men 0-12



All day

# WHO WATCHES METRO LINEAR TV?



METRO TV H1 2018 (0200-2600)	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
<b>Audience</b>	1,685,000	179,000	321,000	637,000	177,000	290,000	786,000	899,000
<b>TARP %</b>	9.8	4.7	5.3	8.7	9.5	8.8	9.2	10.3
<b>Av Daily Reach % 1min</b>	62	51.3	46.3	60.9	66	62.4	60.4	63.6
<b>Average Time Viewed (Univ)</b>	2:21	1:07	1:16	2:05	2:17	2:07	2:13	2:29
<b>Average Age</b>	50	7	30	42	43	44	49	51
<b>Profile</b>	100.00%	10.60%	19.10%	37.80%	10.70%	17.60%	46.60%	53.40%

Source: OzTAM Metro Viewing to Total TV, 0200-2600, Consolidated 28 data, Jan to June 2018

# WHO WATCHES SUBSCRIPTION LINEAR TV?

NATIONAL STV H1 2018 (0200-2600)	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
<b>Audience</b>	986,000	119,000	179,000	386,000	127,000	201,000	472,000	514,000
<b>TARP %</b>	12.7	6.2	7.8	12.5	13.5	12.6	12.1	13.3
<b>Av Daily Reach % 1 min</b>	72.1	60	58.4	75	76.8	73.5	71	73.3
<b>Average Time Viewed (Univ)</b>	3:03	1:29	1:53	3:01	3:15	3:01	2:55	3:11
<b>Average Age</b>	49	7	30	42	44	44	49	49
<b>Profile</b>	100.00%	12.10%	18.20%	39.10%	13.20%	20.80%	47.90%	52.10%



# WHO WATCHES REGIONAL LINEAR TV?



REGIONAL TV H1 2018 (0200-2600)	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
<b>Audience</b>	904,000	93,000	130,000	299,000	89,000	135,000	421,000	483,000
<b>TARP %</b>	11.6	5.3	5.7	10.2	10	9.3	10.9	12.3
<b>Av Daily Reach % 1 min</b>	64.8	51.9	45.9	63.1	63.3	60.2	62.8	66.8
<b>Average Time Viewed (Univ)</b>	2:47	1:16	1:22	2:27	2:25	2:13	2:36	2:57
<b>Average Age</b>	53	7	30	43	43	43	52	53
<b>Profile</b>	100.00%	10.30%	14.40%	33.00%	10.10%	15.30%	46.50%	53.50%

Source: OzTAM Regional Viewing to Total TV, 0200-2600, Consolidated 28 data, Jan to June 2018



Jan to June 2018

In-Home Linear TV: How many?

# HOW MANY AUSTRALIANS VIEW LINEAR TV?



**15.6 million Australians** in a day  
**63%** of the population



**20.9 million Australians** in a week  
**83.3%** of the population



**23.3 million Australians** in a month  
**93.0%** of the population

# HOW MANY AUSTRALIANS DOES LINEAR TV REACH WEEKLY?

## AVERAGE WEEKLY CUME REACH 000s

000s	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
<b>Metro</b>	14,313	3,035	4,463	6,115	1,637	2,834	6,991	7,322
<b>Regional</b>	6,567	1,374	1,630	2,477	771	1,238	3,202	3,364
<b>Subscription TV</b>	6,950	1,635	1,869	2,830	888	1,484	3,443	3,506

## AVERAGE WEEKLY CUME REACH %

%	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
<b>Metro</b>	83.0%	78.8%	73.4%	83.2%	88.3%	86.0%	81.9%	84.1%
<b>Regional</b>	84.0%	77.8%	71.7%	84.4%	86.6%	85.0%	82.7%	85.4%
<b>Subscription TV</b>	89.5%	85.1%	81.9%	92.0%	94.4%	92.8%	88.7%	90.4%





Jan to June 2018

# In-Home Linear TV: How long?

# HOW LONG DO AUSTRALIANS SPEND WITH TV EACH DAY?



## TOTAL TV VIEWING 2017 - JAN TO JUNE 2018 (hh:mm)

	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
Metro/Regional	02:28	01:09	01:18	02:11	02:20	02:09	02:20	02:37
Subscription TV	3:03	1:29	1:53	3:01	3:15	3:01	2:55	3:11

Source: OzTAM Metro, RegTAM Regional Agg+WA and National STV. Total TV. Average Time Viewed (Universe), 0200-2600. Jan To June 2018  
Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600





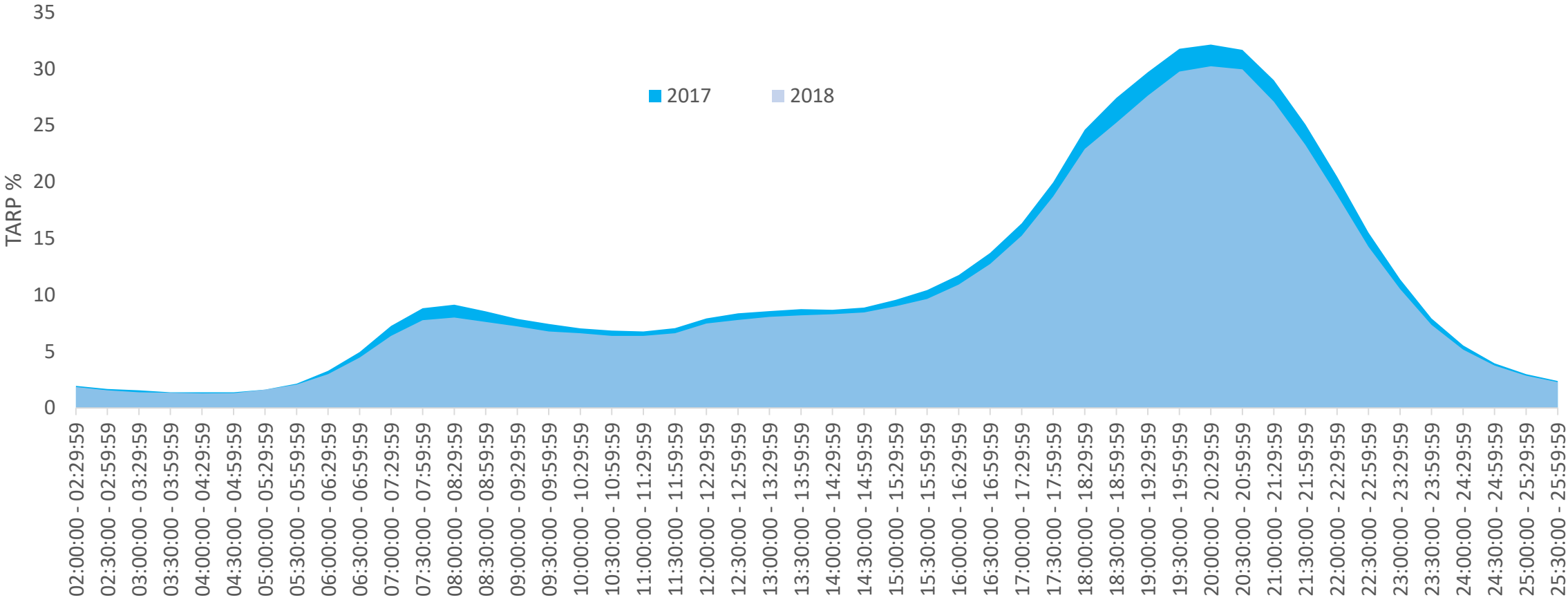
Jan to June 2018

# In-Home Linear TV: Where and When?

# WHEN DO WE EXPERIENCE LINEAR TV AT HOME?



SHAPE OF THE DAY  
TARP, Total Ppl, Metro and Regional



Source: OzTAM Metro and Regional Data. Total TV. TARP, 0200-2600. Jan to June 2017 V Jan to June 2018  
Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600

A hand holding a black smartphone, with the background featuring a bokeh effect of colorful lights in shades of blue, orange, and white.

Jan to June 2018

# In-Home Linear TV: Playback



**WONDERING ABOUT LIVE OR  
PLAYBACK (PVR) VIEWING?**

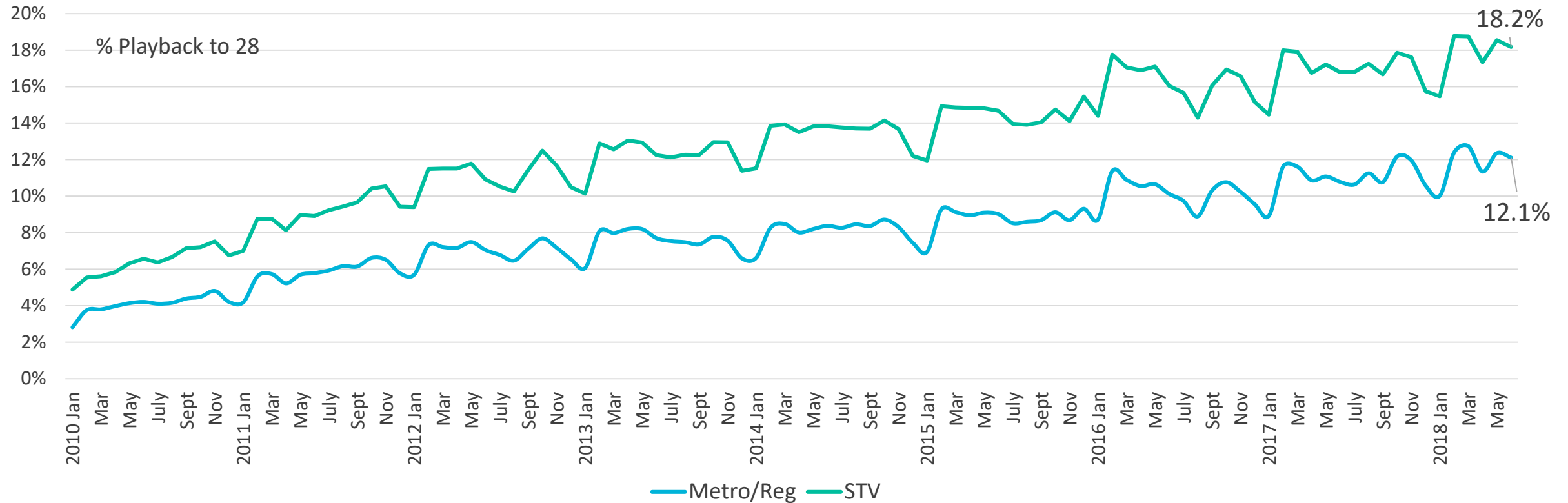
**HERE ARE THREE FACTS.**

- 1. 12% of all viewing is record and playback**
- 2. 62% of playback viewing occurs within 48 hours from live broadcast**
- 3. Drama audiences increase 21% with playback viewing**

# PLAYBACK VIEWING TREND

Playback as a proportion of overall viewing has grown since its introduction in 2010, but growth has slowed since the introduction of Broadcast On-Demand Services. The peaks at the start of each year are driven by competing 'must see' TV.

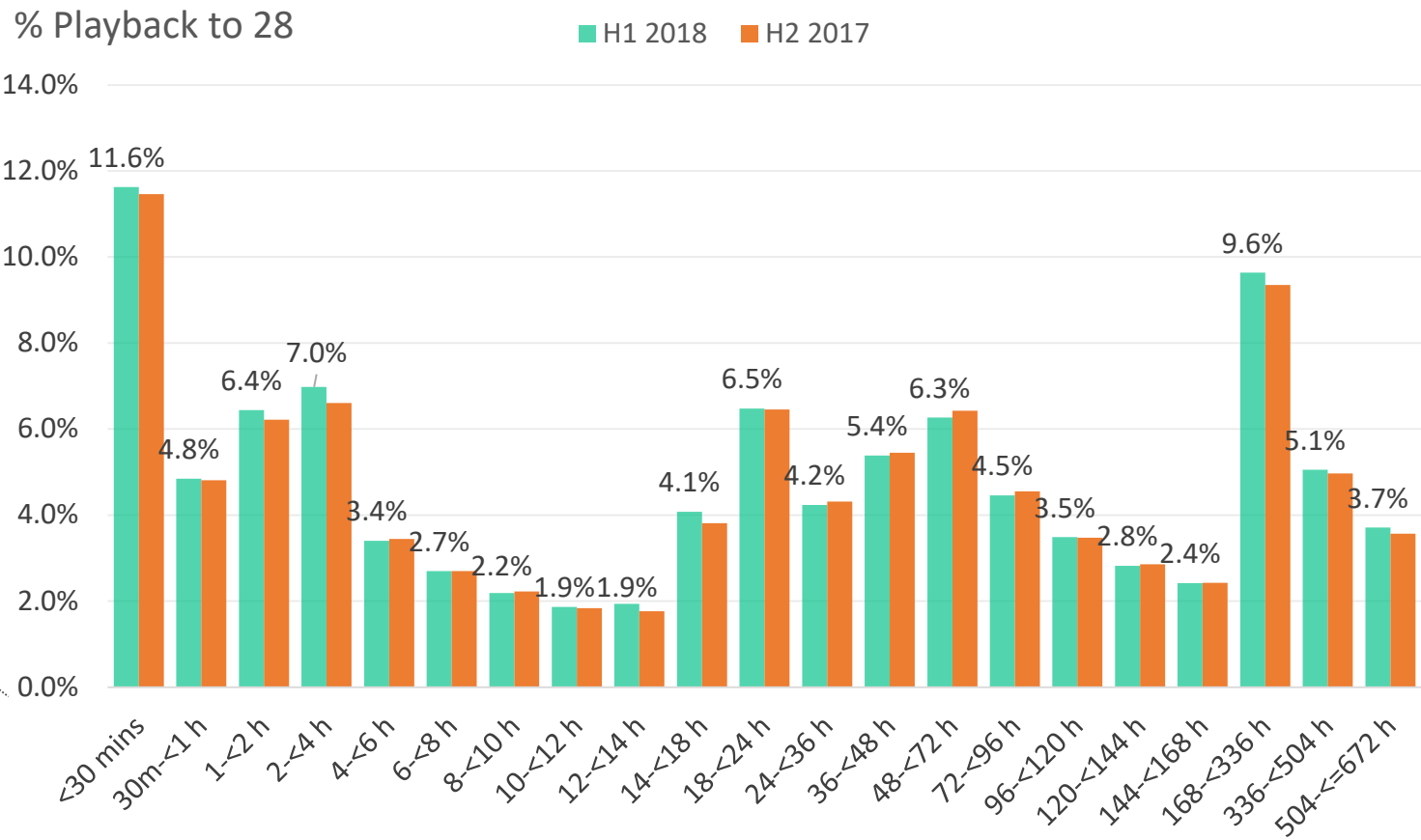
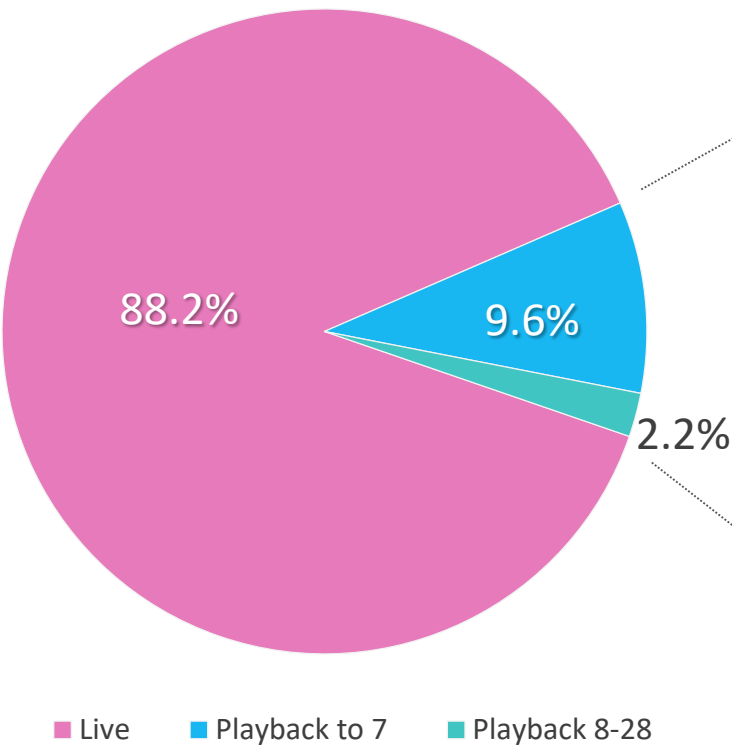
## PLAYBACK VIEWING



# ALMOST TWO THIRDS OF PLAYBACK IS WITHIN 48 HOURS OF BROADCAST



## 62% PLAYBACK TV PROGRAMS WITHIN 48 HOURS

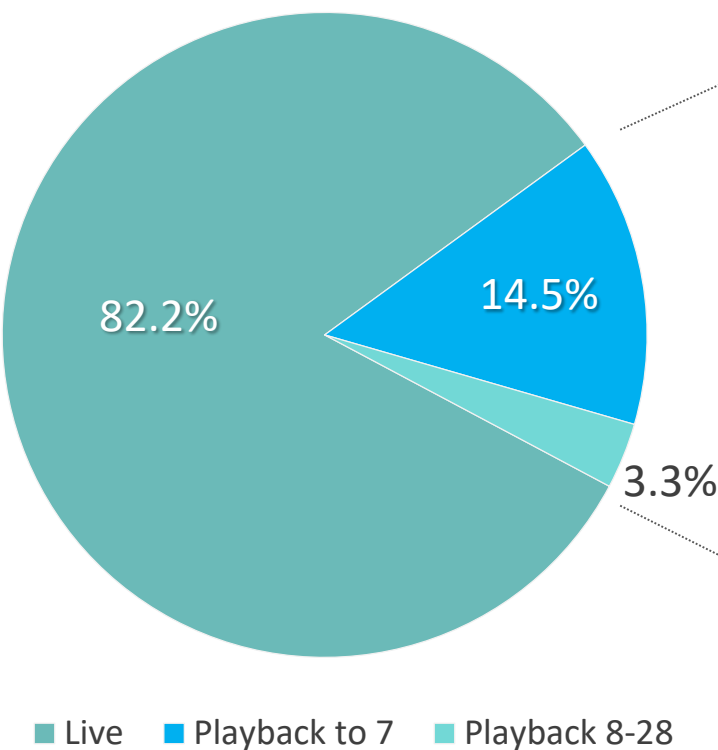


Source: OzTAM Metro and Regional Data. Total TV. 0200-2600. Jan to June 2018 V July 2017 to Dec 2017 . % of Playback viewing  
Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600

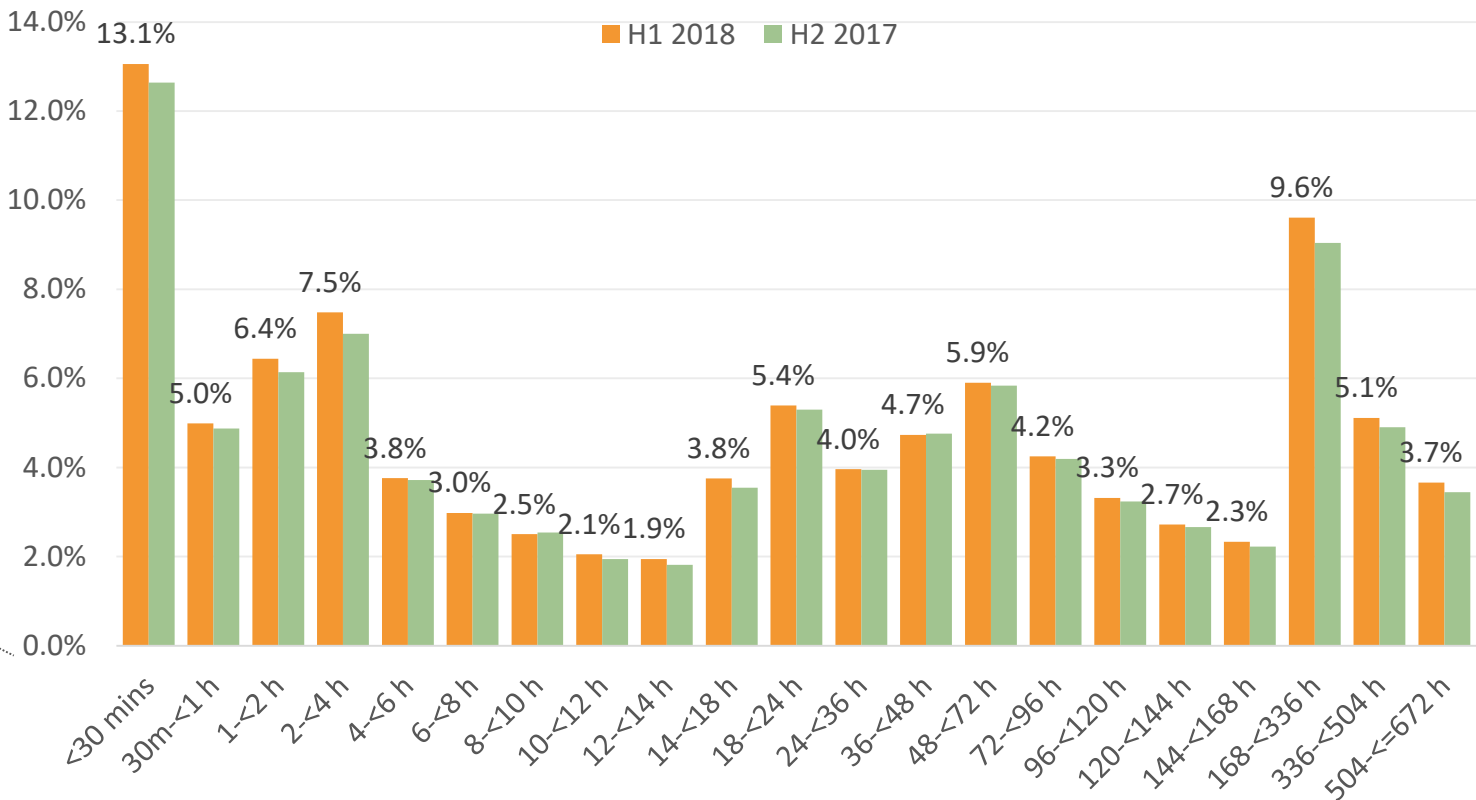


# ALMOST TWO THIRDS OF STV PLAYBACK IS WITHIN 48 HOURS OF BROADCAST

## 63% PLAYBACK TV PROGRAMS WITHIN 48 HOURS FOR STV

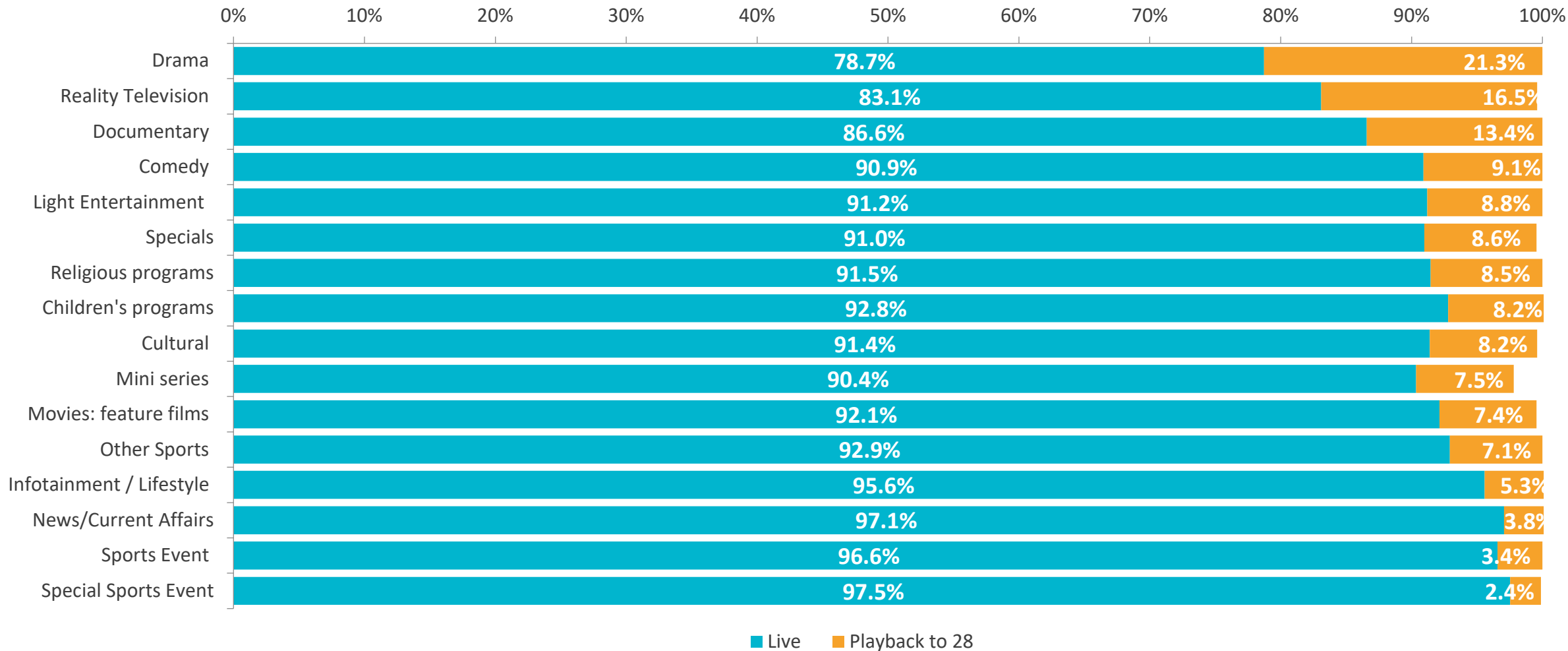


% Playback to 28



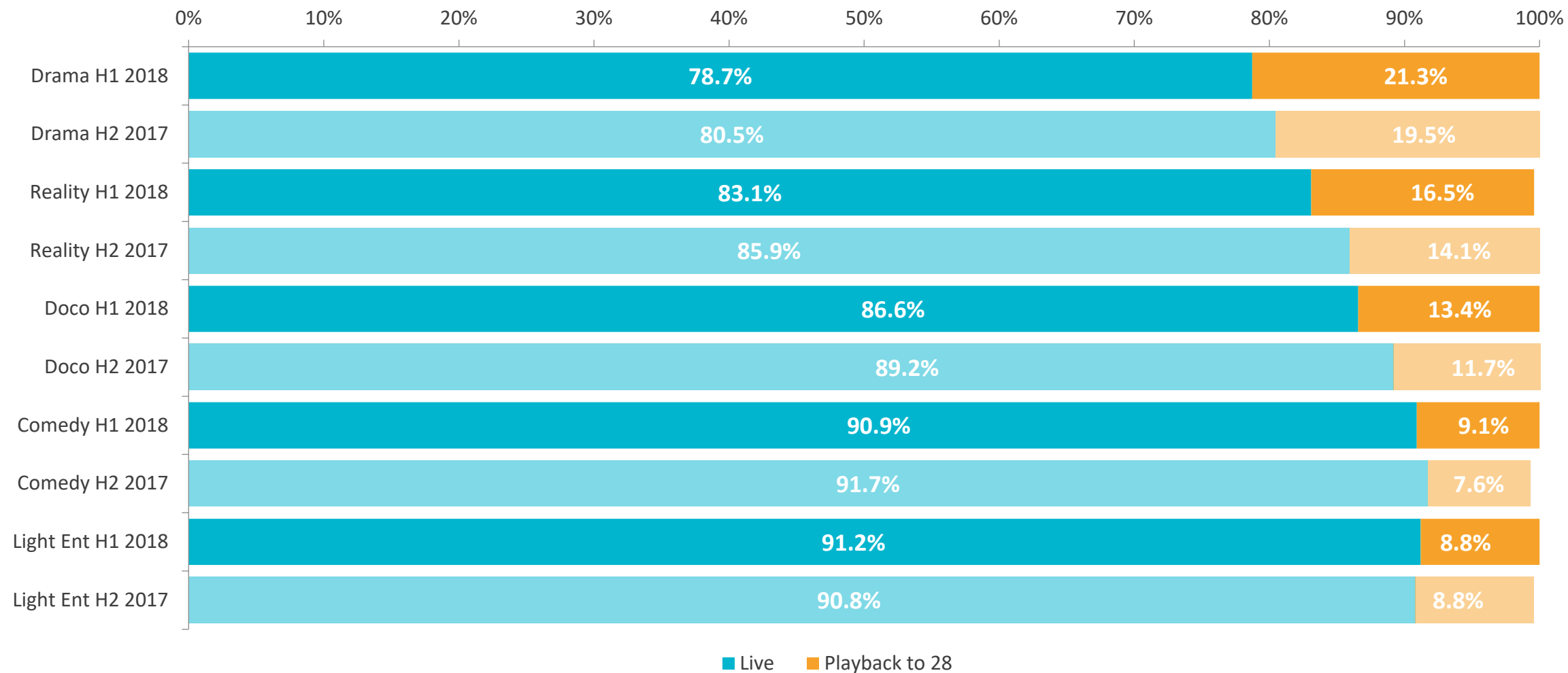
Source: OzTAM National STV. Total TV. 0200-2600. Jan to June 2018 v July 2017 to Dec 2017. % of Playback viewing  
Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600

# PLAYBACK CAN INCREASE AUDIENCES BY UP TO 21%



Source: OzTAM Metro and Regional Data , Total TV. 0200-2600. Jan to June 2018 – FTA Networks only  
Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600

# GENRE PLAYBACK IS CONSISTENT



Source: OzTAM Metro and Regional Data, Total TV. 0200-2600. Jan to June 2018 versus July 2017 to Dec 2017 – FTA Networks only  
Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600



Jan to June 2018

# In-Home Linear TV: Program All Stars



## **WHO WAS WATCHING WHAT IN 2018?**

**HERE ARE THREE KEY FACTS  
TO KEEP YOU IN THE KNOW.**

- 1. Sport was the number one genre in first half of 2018**
- 2. The top sporting programme of the year was State of Origin Game 1**
- 3. The top Entertainment programme of the year was The Good Doctor**

# KEY VIEWING STATS



Avg Linear TV Audience

1,842,000



Total BVOD Mins

552,807,004



Avg Linear TV Audience

1,798,000



Total BVOD Mins

300,228,121



Avg Linear TV Audience

927,000



Total BVOD Mins

182,374,937



Avg Linear TV Audience

11,216



Total BVOD Mins

25,401,901

Source: OzTAM Metro and Regional Data , Jan to June 2018 . BVOD viewing sourced from OzTAM Video Player Measurement (VPM), includes Catch Up and Live, Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600





For more information contact us  
[contact@thinktv.com.au](mailto:contact@thinktv.com.au)