

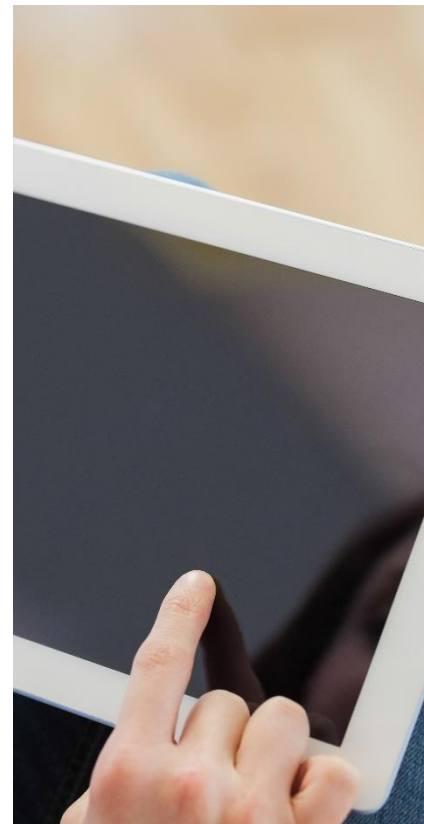
Understanding the Disney+ launch and SVOD viewing

June 2020

TRP Codex

Daily granular measurement of Netflix, Amazon Prime, Apple TV+, Disney+, YouTube, Gaming, DVD & Blu-Ray viewing.

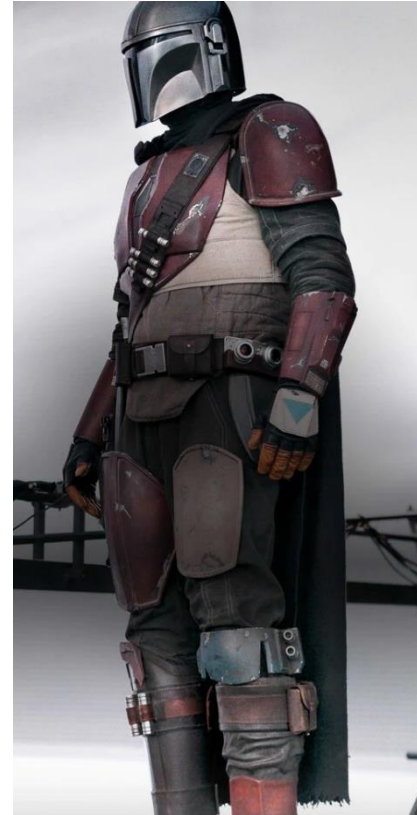
- Robust: 2,000+ daily responses
- Granular: programme level data, split by device, time viewed etc
- Insight: respondent level data for deeper analysis
- Equivalent: traditional TV metrics (average audience, reach)
- Total Viewing: captures all viewing, not just SVOD



An average audience of 2.3m adults 16+ watched the first episode of The Mandalorian across the first eight weeks after the launch of Disney+, although subsequent episodes have struggled to achieve those viewing levels

The series to date accounts for 7% of all viewing to Disney+ content in the period, making it the most watched content on the platform

How do we get people to reliably report what they watched?
How do we know which episodes were watched?
How do we report Average Audience, not streams or views?
How are we able to rank every piece of content viewed?



In total, Star Wars related series and movies contributed 18% of total viewing, Marvel content made up 23%, led by movies such as Captain Marvel and the Avengers franchise, and Pixar a further 10%

More traditional Disney content makes up the balance, with the top 10 content list including Moana and the 1994 version of The Lion King

How do we measure total consumption of each service?
How do we break it down into type of content?
How do we know it's the 1994 version of The Lion King?

The Disney logo in its signature script font.The Star Wars logo in a stylized, blocky font with a metallic, 3D effect.The Marvel logo in a bold, white, sans-serif font inside a red rectangular box.The Pixar logo in a simple, grey, sans-serif font.

In total, Disney+ viewers watch around 30 minutes of content per day on the platform, compared to Netflix subscribers' 60 minutes per day

This is partly a result of different volumes of content available - Netflix has approximately 10 times the volume of content available via Disney+

How do we know how many users each service has?
How do we know how large each service's library is?

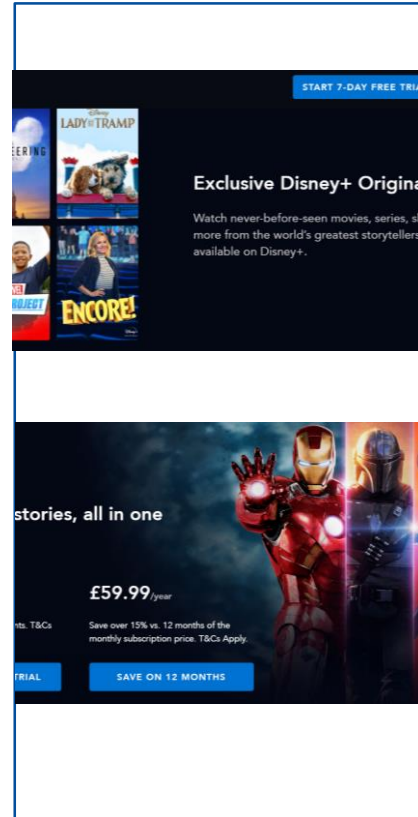


NETFLIX

When asked about reasons for subscribing to Disney+, respondents cited exclusivity of content and the value of the current offer as prime motivations

In fact, of all viewers who watched at least 30 minutes of The Mandalorian, 66% watched no other Star Wars content and 29% watched no other content at all on the platform

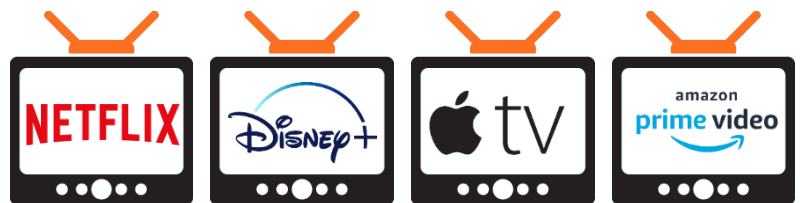
How do we understand subscribers' motivations?
How can we calculate unique and overlap reach?



TRP Content Warehouse allows identification of SVOD programmes

TRP Content Warehouse allows us to link content to meaningful metadata

TRP Content Warehouse



Full programme catalogue

All major titles

Content Metadata

Title

Tiger King

Series/Ep

S1, Ep1

Duration

49 mins

Synopsis

Meet Joe Exotic, the gun-toting operator of an Oklahoma big cat park. He's been accused of hiring someone to murder his chief rival, Carole Baskin.

TRP Surveys

The Panel



2000+ daily respondents
Weighted to be nationally representative
(age x gender x SVOD penetration)



Currently increasing the oversample of SVOD
subscriber panellists



TV specific initial survey (i.e. SVOD availability,
TV Package subscription), refreshed regularly

The Survey



Daily OTT/SVOD survey



Each panellist selects content from TRP Content
Warehouse



And adds details of when, how (platform), and
where they watched

The Survey

Completing the Survey

CQ2 powers intelligent programme search

If you can't find the programme you need in the list, select "No" below and enter manually

Title

Series

Episode

Episode Title

Synopsis

Programme List (8 displayed)

of hiring someone to murder his chief rival, Carole Baskin. (Factual)

Tiger King: Murder, Mayhem and Madness (Netflix), Series: 1, Ep: 2, Cult of Personality, Subjected to long hours, little (or no) pay and the whims of eccentric bosses: are big cat park employees just cogs in a web of personality cults? (Factual)

Tiger King: Murder, Mayhem and Madness (Netflix), Series: 1, Ep: 3, The Secret, An incident in Carole's past casts her in a suspicious light, and while she maintains her innocence, Joe is all too happy to point the finger at her. (Factual)

Tiger King: Murder, Mayhem and Madness (Netflix), Series: 1, Ep: 4, Playing with Fire, Joe ramps up his efforts to become an internet and TV star, but a mysterious fire and lawsuit threaten his plans – until an angel investor appears. (Factual)

Tiger King: Murder, Mayhem and Madness (Netflix), Series: 1, Ep: 5, Make America Exotic Again, As Joe dives into politics, he deals with turmoil and tragedy in his personal life. Meanwhile, the dynamics at the park change with the new owners. (Factual)

Tiger King: Murder, Mayhem and Madness (Netflix), Series: 1, Ep: 6, The Noble Thing to Do, James Garretson makes a shocking claim about Joe, leading to FBI involvement. Desperation sets in for Joe, who thinks Jeff and James have set him up. (Factual)

Tiger King: Murder, Mayhem and Madness (Netflix), Series: 1, Ep: 7, Dethroned, Joe faces the music in the courtroom but insists the story is far from over. Jeff's business prospects crumble. Former G.W. Zoo workers try to move on. (Factual)

Tiger King: Murder, Mayhem and Madness (Netflix), Series: 1, Ep: 8, The Tiger King and I, In this aftershow, Joel McHale talks with Jeff, Saff, Erik and more to get their reactions to the series, their portrayals and their new fame. (Factual)

Respondents type in a programme title, and are then presented with a list of episodes to select from. They can narrow this down by typing in series # if known, and can search using the Synopsis if needed, i.e. to search for "Vegas" to find the correct episode of Friends. For shows with multiple seasons, if the newest season is recent, this will be presented at the top, if not then seasons will be presented in chronological order.

The Survey

Completing the Survey

Respondents are then taken to a series of questions about each piece of content that they reported watching.

How much of the programme did they watch?

What time did they watch it? (by hour)

How did they watch?

Where did they watch?
(home/work/school etc)

Tiger King: Murder, Mayhem and Madness (Netflix)

Series: 1; Ep: 5; Make America Exotic Again; As Joe dives into politics, he deals with turmoil and tragedy in his personal life. Meanwhile, the dynamics at the park change with the new owners. (Factual)

How much of the programme did you watch?

Hardly any of it

Some of it

Around half of it

Most of it

All of it

How did you watch?



Watched on a TV



Watched on a PC



Watched on a Laptop



Watched on a Tablet



Watched on a Phone

The Survey

Completing the Survey

Respondents have an optional free text field to state their likes & dislikes.

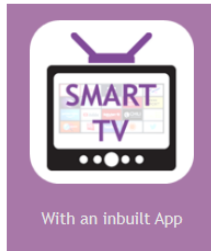
They then get asked for a more detailed breakdown of “how” they watched it, i.e. within their TV they watched via an inbuilt Smart TV platform.

What did you like and/or dislike about this programme? (optional)

Like

Dislike

How did you watch the programme on TV?



Via Sky Q



Cast to a TV



Via Apple TV



Via Amazon Firestick



Via a Games Console

The Content Viewing File

3 example records from the CVF

Panellist metadata

Date	Respondent ID	Gender	Age Group	Social Class	SVOD / Non-SVOD	TV Viewing Platforms	TV Subscription Packages	TV Services	Approximately how much do you pay each month for your TV subscription?	Do you watch/listen to/follow...?	Favourite Football Teams
05/04/2020	XXXX	Female	35-44	C1	SVOD	Sky	Sky Entertainment	Sky Sports BT Sport	£40-49.99	Football	Manchester United
07/04/2020	XXXX	Female	25-34	C1	SVOD	Virgin	Virgin Bigger Bundle V	None of These	£40-49.99	Football	
15/04/2020	XXXX	Male	25-34	C1	SVOD	Sky	Sky Entertainment + S	Sky Cinema Sky Sports B	£80+	Boxing Football	Liverpool England

Content metadata

SVOD Service	Content ID	Title	Series	Episode	Episode Title	Synopsis	Release Year	Original Status	Platform Genres	Short Genre	Date Added	Duration	Series Duration
Netflix	145621	Tiger King: Murder,	1	1	Not Your Average	Meet Joe Exotic,	2020	Netflix	True Crim	Drama	20/03/2020	49	318
Netflix	145614	Tiger King: Murder,	1	3	The Secret	An incident in Ca	2020	Netflix	True Crim	Drama	20/03/2020	47	318
Netflix	145574	Tiger King: Murder,	1	5	Make America E	As Joe dives into	2020	Netflix	True Crim	Drama	20/03/2020	44	318

Viewing session

How much of the programme did you	Unweighted Mins	Device	TV Platform	Where did you watch?	Other (Specify)	Time	Like	Dislike
All of it	49	TV	TV: Inbuilt	At home		21:00	Intriguing story	
Some of it	12	TV	TV: Inbuilt	At home		13:00		
All of it	44	TV	TV: Sky Q	At home		22:00	Great stor	Nothing I c

- Details of every recorded viewing session
- Contains panellist metadata, content metadata and session metadata in every record for easy analysis
- ~80,000 records (and building daily)

Strategic Questions

Data is robust, allowing deeper analysis in addition to performance tracking

OTT Binging & Anchoring

How does releasing episodes weekly (*The Mandalorian*, *Picard*, *The Grand Tour*) impact on viewers likelihood to stick with and anchor to a show?

Do shows with a weekly release benefit from higher stickiness than comparable linear TV shows? Does this indicate that ease of finding a show (continue watching...) is helping, despite i.e. series recording on linear TV?



Value of sampling an SVOD show

How valuable (in terms of total season viewing) is getting viewers to sample a show for SVOD providers?

What types of show are viewers sampling and rejecting vs what type do they stick with?



Slow-burners v starting with a bang

How quickly do SVOD shows become hits? Which types of show build due to word of mouth recommendations (*Tiger King*, *Cheer*) vs which shows receive major promotion?



Scheduling - when is SVOD the biggest competitor?

When are viewers most likely to watch SVOD titles (and in particular, premier/prestige shows) - when is this the biggest competitor to linear TV?



Evolution of a platform

Will Disney+ sustain its launch audiences, or will viewers quickly exhaust its back catalogue and return to Netflix/linear TV?

Do people watch across multiple SVOD providers at once, or focus on one at a time?

Total Consumption: The Survey

Completing the survey

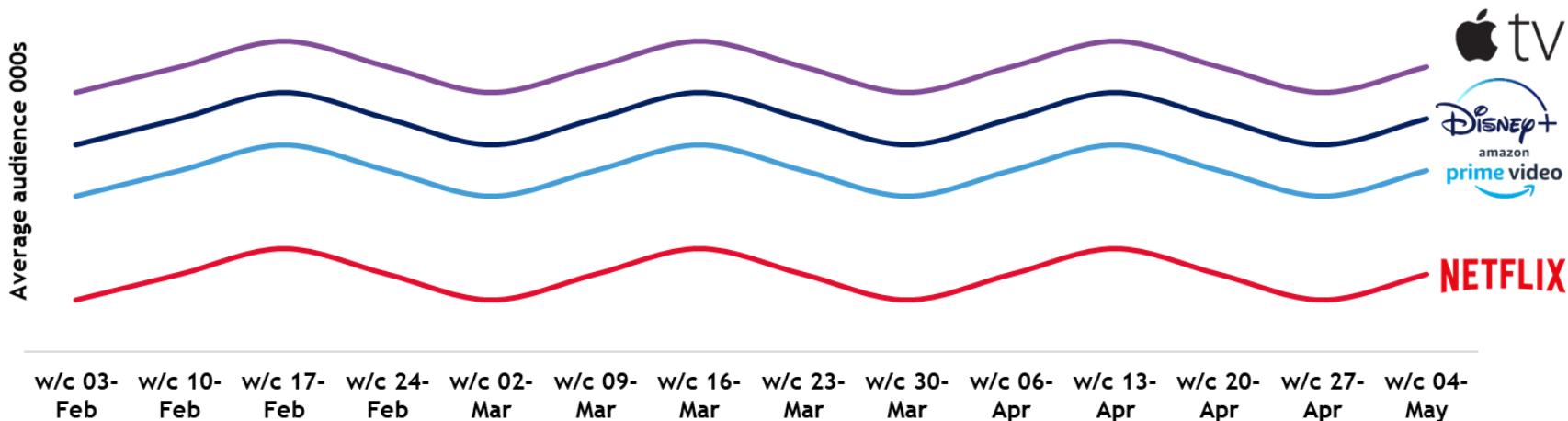
Respondents are asked how long they spent doing each of these activities, on each of these platforms, either in their own or someone else's home

This gives us a complete Top-Down measure of screen time

	TV	PC	Laptop	Tablet	Mobile Phone
Watched live TV	1-2 Hours	Please sele...	Please sele...	Please sele...	Please sele...
Watched recorded TV	16-30 Mins	Please sele...	Please sele...	Please sele...	Please sele...
Watched TV via a Catch Up service - e.g. BBC iPlayer, All 4, Sky On Demand etc	16-30 Mins	Please sele...	Please sele...	Please sele...	Please sele...
Watched Sky Boxsets	31-60 Mins	Please sele...	Please sele...	Please sele...	Please sele...
Watched Netflix	Please sele...	Please sele...	Please sele...	Please sele...	Please sele...
Watched Amazon Prime Video	Please sele...	Please sele...	Please sele...	Please sele...	Please sele...
Watched Apple TV+	Please sele...	Please sele...	Please sele...	Please sele...	Please sele...
Watched Disney+	16-30 Mins	Please sele...	Please sele...	Please sele...	Please sele...
Watched YouTube	Please sele...	Please sele...	Please sele...	Please sele...	1-5 Mins
Watched Other Online Video	Please sele...	Please sele...	Please sele...	Please sele...	Please sele...
Watched a DVD/Blu-Ray	Please sele...	Please sele...	Please sele...	Please sele...	Please sele...
Played video games	Please sele...	Please sele...	Please sele...	Please sele...	Please sele...
Spent time searching for something to watch	1-5 Mins	Please sele...	Please sele...	Please sele...	Please sele...

Tracking total consumption

Total Consumption data is included in the weekly report for overall viewing levels



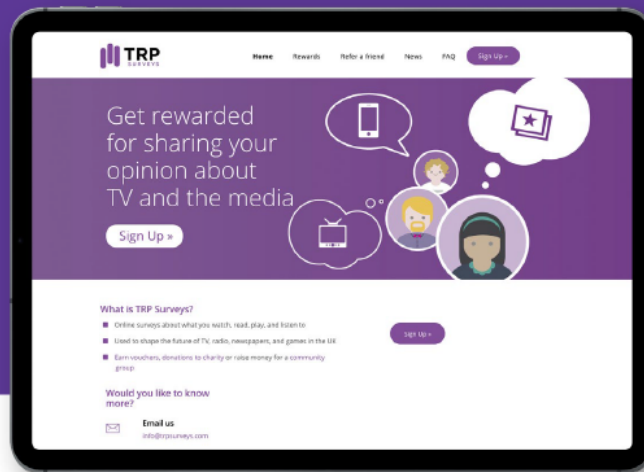
Top-Down data is robust enough to allow regular, weekly tracking of all SVOD platforms.

Recently it has illustrated the extent of the sharp increases during Lockdown, and allows us to identify how Netflix, Amazon Prime and Disney+ viewing changes from week to week based on content releases & other factors.

TRP Surveys Panel

Daily sample of 2,000 from our large online panel.

TRP Surveys is a UK nationally representative panel of adults aged 16+, each having completed a detailed media-centric recruitment questionnaire enabling rich and media-focused demographic splits.



Panellist Attributes

We have collected a comprehensive range of panellist attributes on recruitment.

These include:

- Basic demographic data (eg Age, Gender, Geographic Area)
- Household composition
- Online TV Services used (eg Netflix, Sky Go, BBC iPlayer, etc)
- TV Platforms available in household (eg Sky, Virgin, Freeview, TalkTalk)
- Type of Pay-TV Subscription (eg Bundle)
- Premium Pay TV service availability (eg Sports, Movies, Box Sets)
- Monthly Pay-TV Subscription £ spent
- Internet usage by device
- Sports followed
- Favourite Sports Team for a range of sports including Football, Cricket, Rugby, American Football

All activities follow the Market Research Society (MRS) Code of Conduct and we are accredited with Cyber Essentials.

Our TRP Surveys Privacy notice can be found here: <https://trpsurveys.com/privacy-notice/>



TRP Contacts

TRP Codex



Contact
codex@trpresearch.com or
your usual TRP contact for
more details



Data and overnight reports
available now



jrobinson@trpresearch.com
07792 893374

James Robinson



draybould@trpresearch.com
07967 657122

David Raybould



tcowell@trpresearch.com
07989 425092

Tim Colwell