

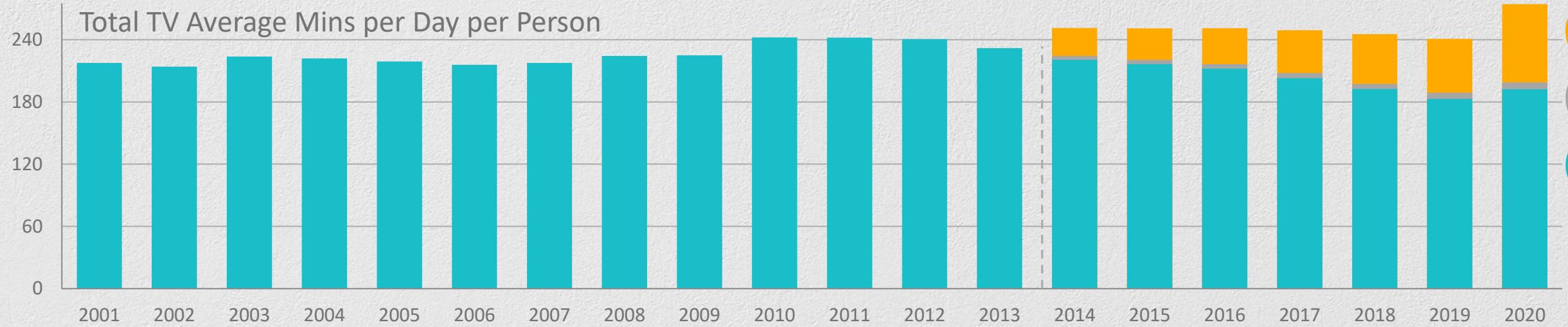
Tracking the Viewer Journey



Tony Mawer & Anthony Waithe, Edinburgh MRG 2021



Viewing has been continually disrupted, but BARB data reveals an emerging blind spot

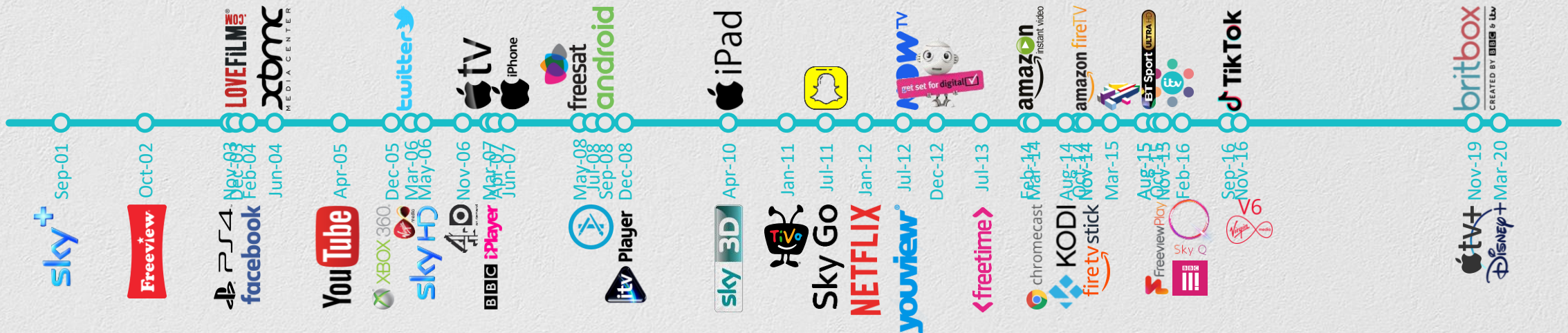


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28

7

Source: BARB. Includes 8-28 Day Timeshift and Unmatched set usage from 2014



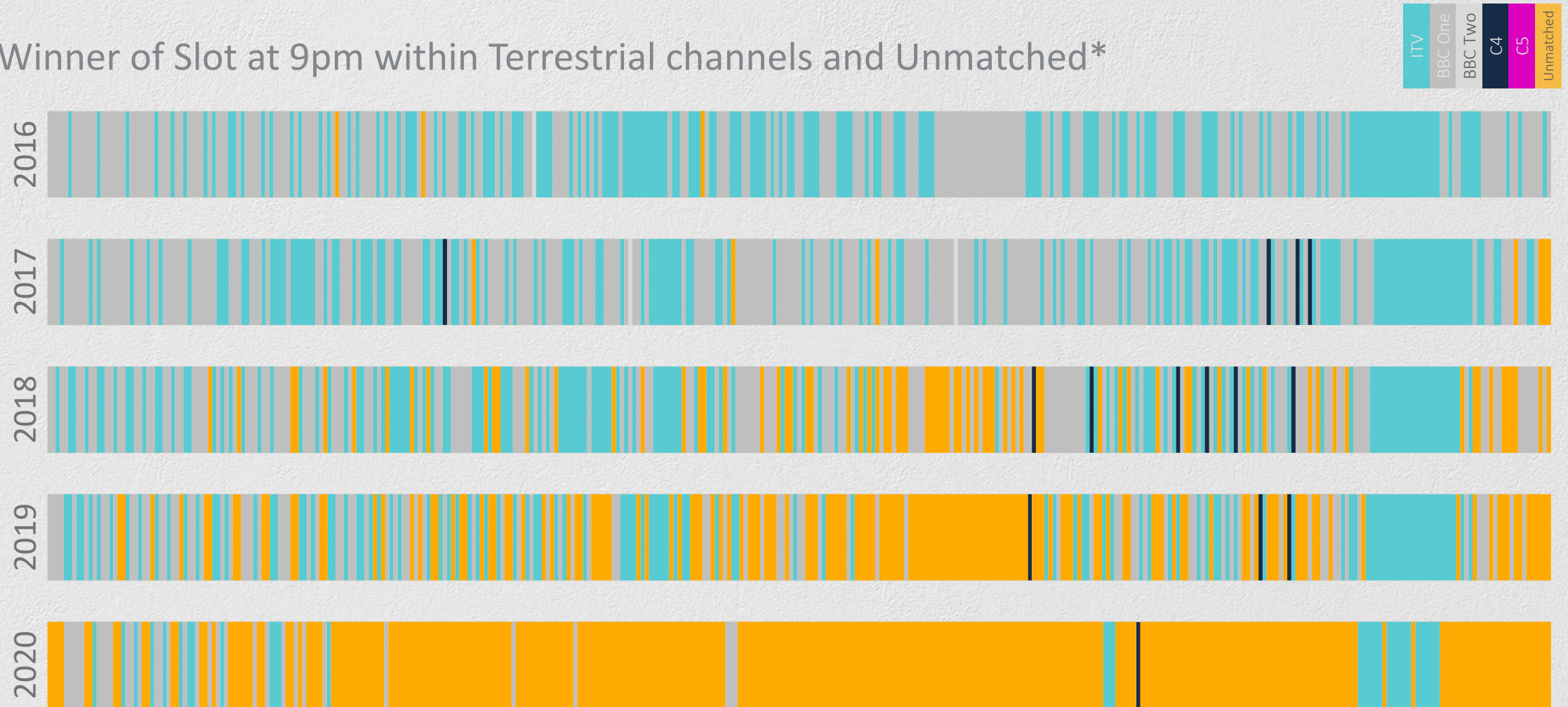
So, what are these other usage of the TV, this “yellow bit”



Physical Format (DVD / Blu-Ray / VCR), Gaming ,
Unaired broadcaster content, Archive (VOD & post 28 day PVR), TV Apps (i.e. YouTube), Subscription VOD, Streaming devices, Videoconferencing

Unmatched had been increasingly “winning” at 9pm, especially since first lockdown.

Winner of Slot at 9pm within Terrestrial channels and Unmatched*

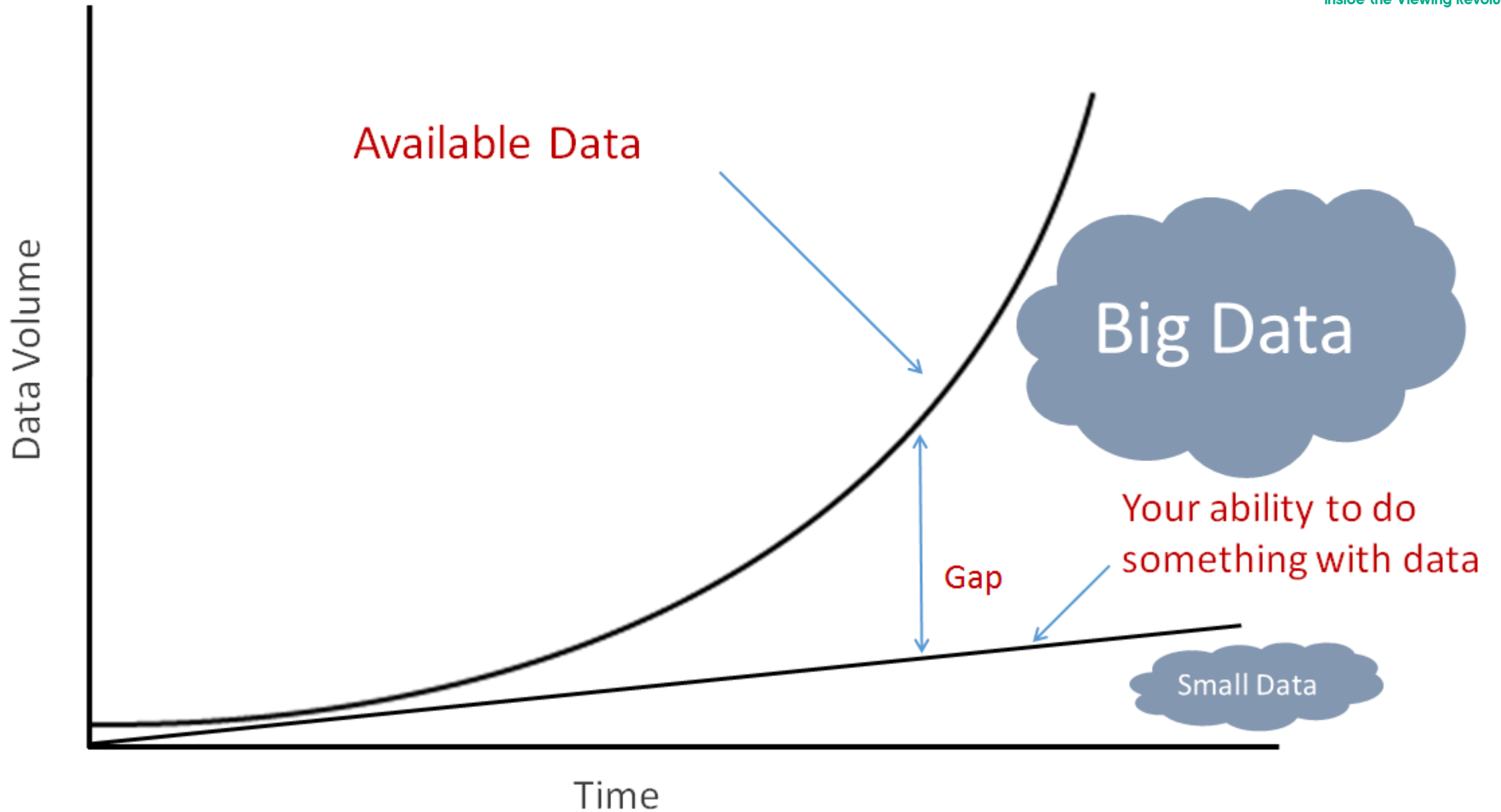


Digital-i

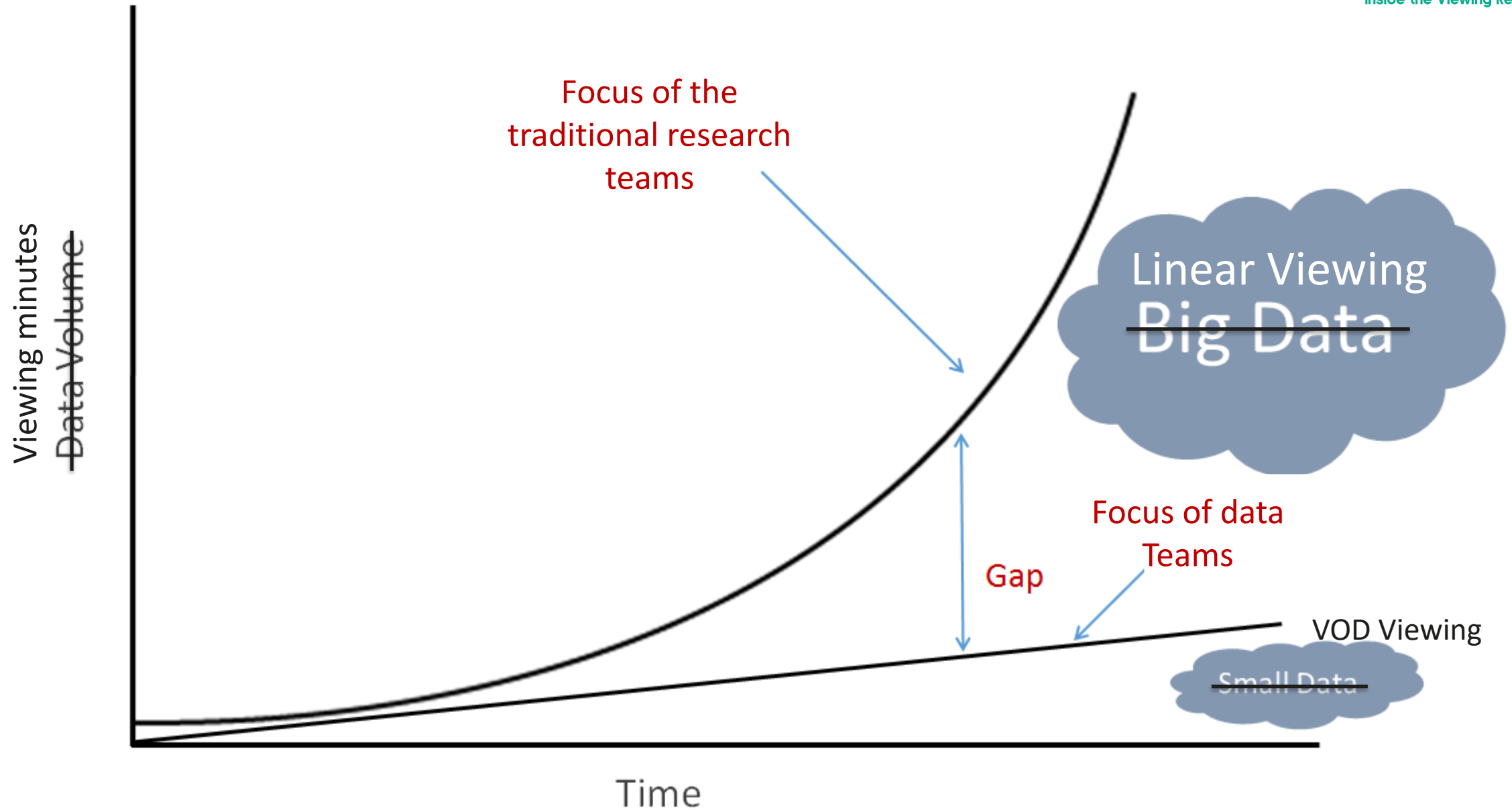


Inside the Viewing Revolution

Data Explosion



Data Explosion



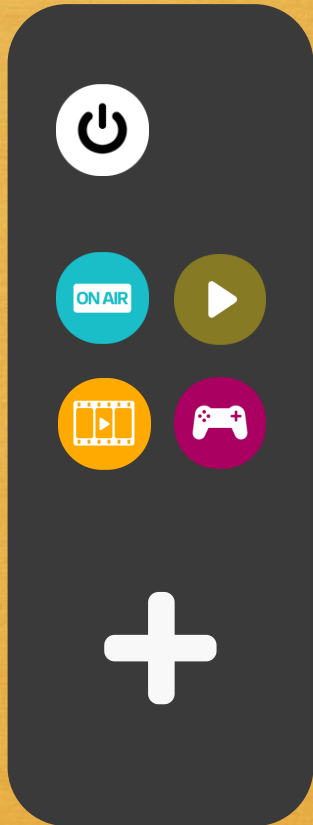
The power of respondent level BARB data

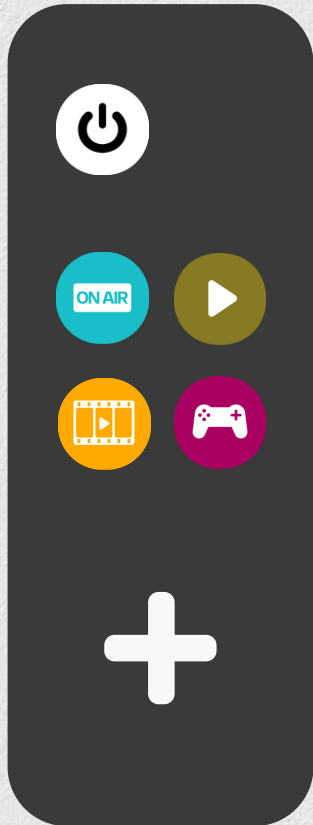
- Panellist Volatility
- Creative segmentation
- Rights evaluation
- Measuring promo effectiveness
- The Viewer Journey

Key Methodological issues

- Excluded Games Console
- Created Activity Type sessions
- Changing between Live TV Channels doesn't break session
- For Joint viewing, person leaving / joining room doesn't break session for existing session
- Switch between Live and VOSDAL doesn't break session if programme is same
- 3 min minimum session
- Change of device does break session

Viewer Journeys to Unmatched





Turn TV Set On / Off

Live TV

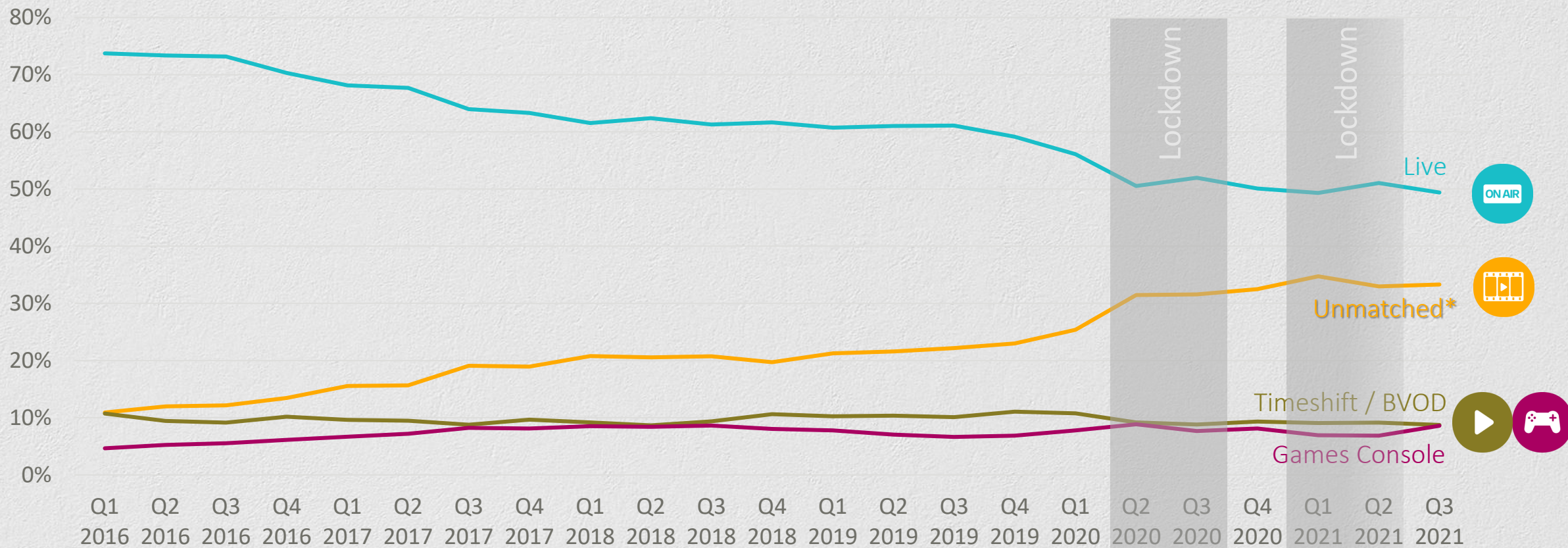
Timeshift Viewing / BVOD

Unmatched Viewing (ex Consoles)

Unmatched Viewing on Gaming Console

The First Lockdown caused a step change in behaviour

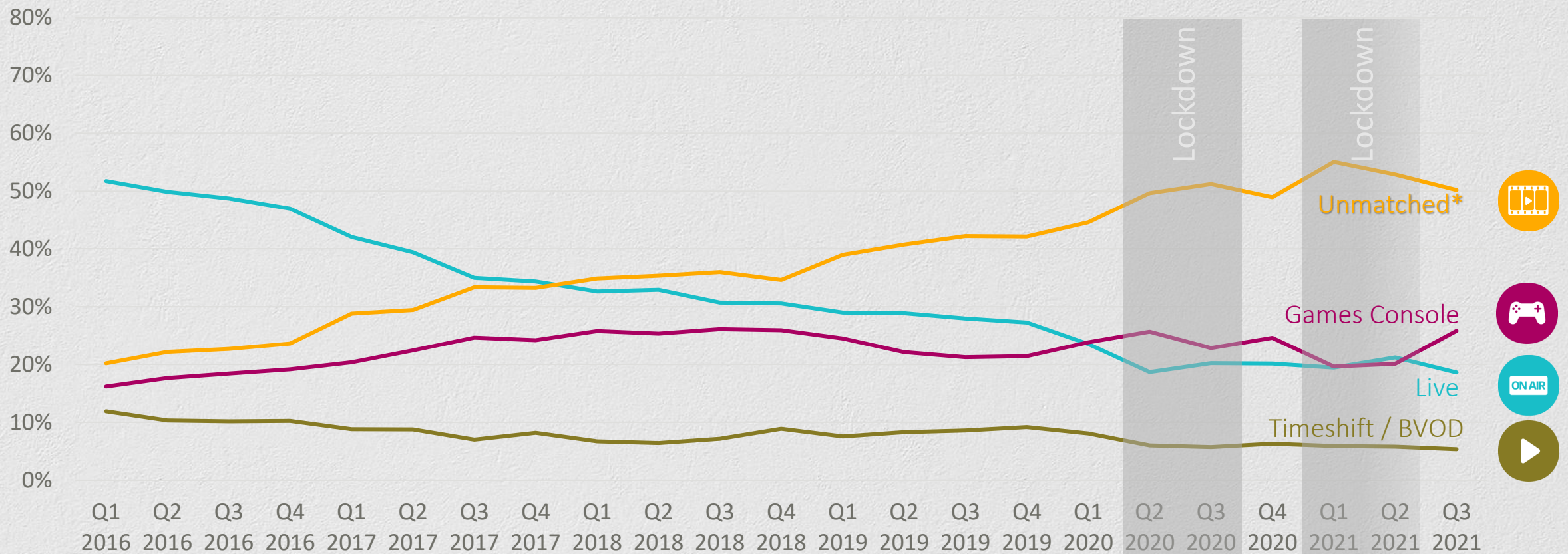
All Adults First Viewing Session – Split by Viewing Type (% of Total First Session Minutes)



Source: BARB \ Digital-i. Unmatched Viewing * Excludes viewing via Games Console

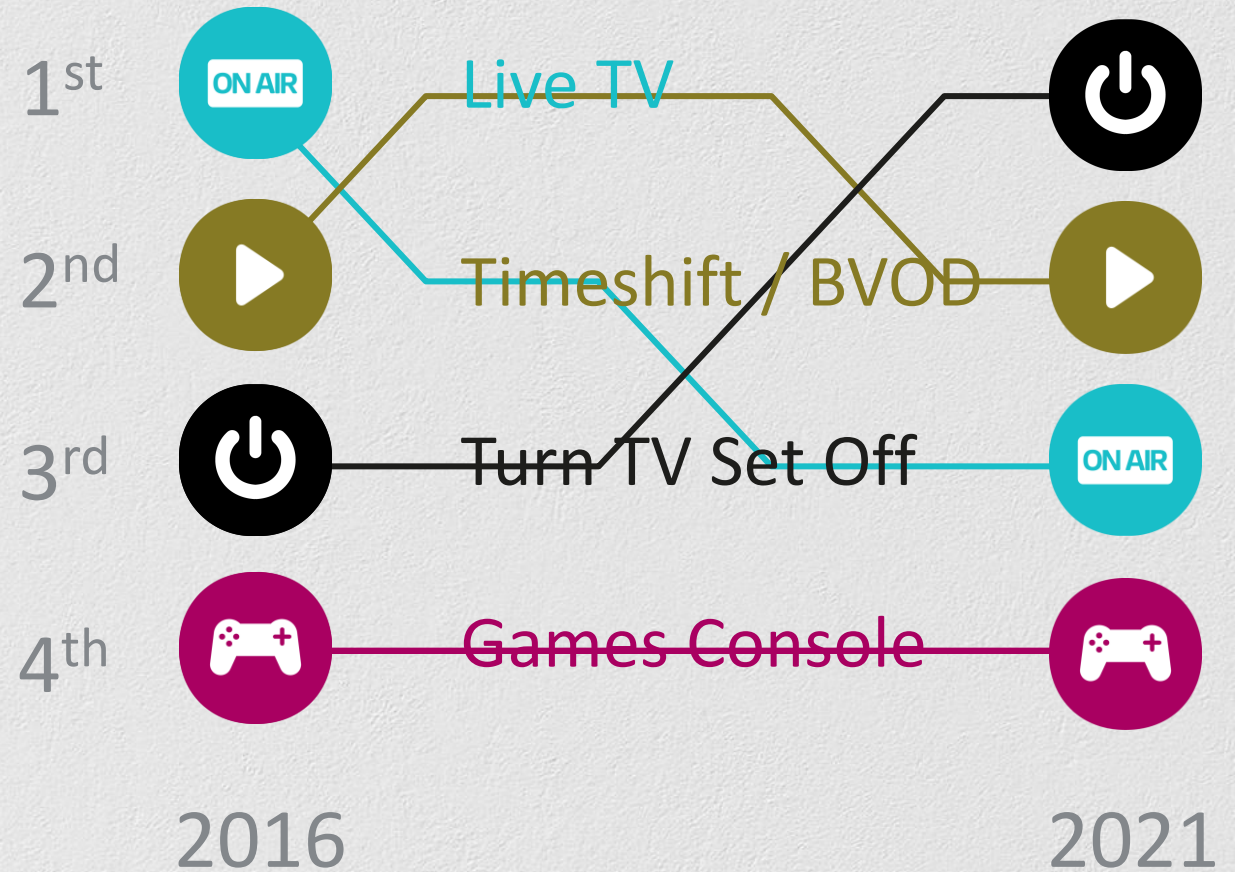
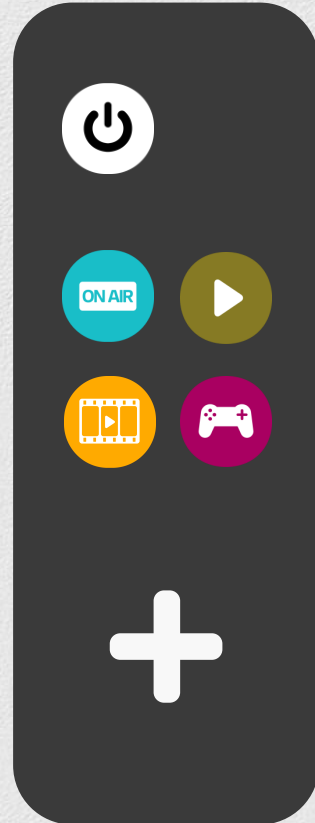
16-34s have long preferred unmatched viewing to Live when they turn on the Telly

16-34s First Viewing Session – Split by Viewing Type (% of Total First Session Minutes)

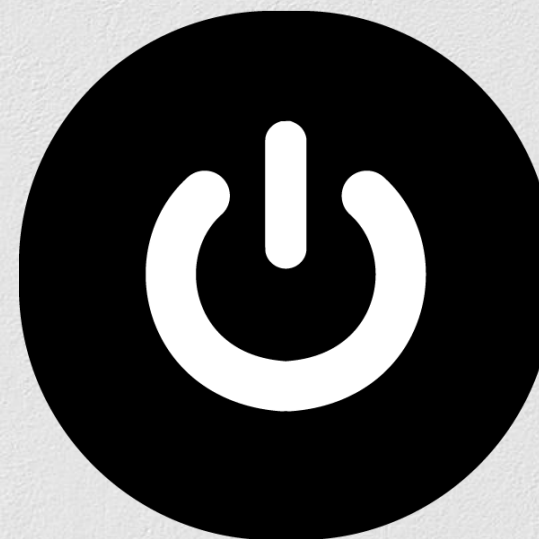
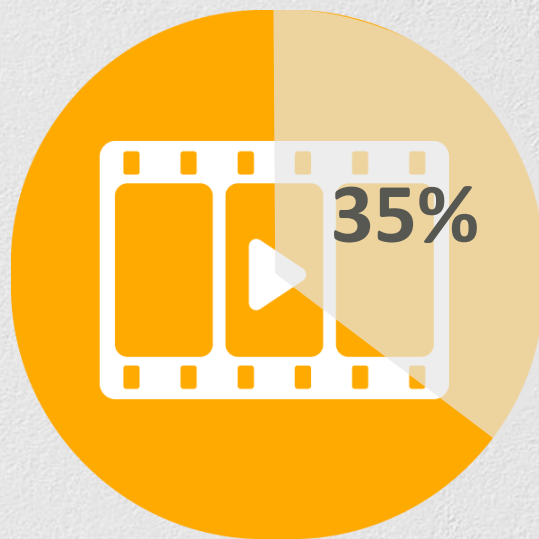
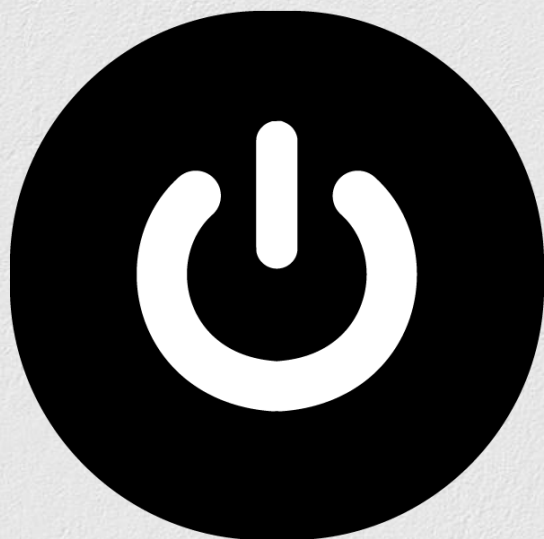


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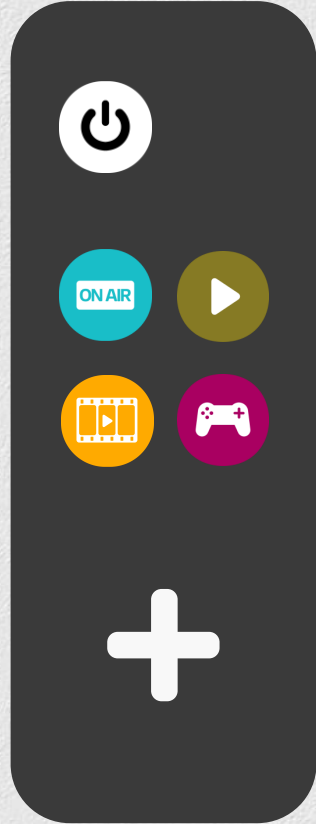
After an unmatched viewing session – what happens next?



What about viewing sessions that involve nothing but unmatched?



Unlocking this blind spot informed our Strategy



Hub Acceleration plan

Marketing Investment / Strategy

Regulatory Strategy



End