



Co-viewing:

Who's **really**
watching?

All together now.

Premium content – whether it's on broadcast TV or online video – is a huge driver for bringing people together in the living room.

Watching TV is a social experience people want to share.



We were curious about this and wanted to **dig deeper**.

With the rise of Connected TV viewing, and the many ways viewers can watch video content, we wanted to know more about the occasions that drive co-viewing, in particular for online video.

We also know that one registered account on TVNZ OnDemand can often be used by more than one person, potentially having a greater effect on the reach of a campaign.

So we did some research...

The research methodology



Sample

- Quantitative online survey
- 25 mins
- Users of online video platforms aged 15-60 years old
- Sample size n = 1,500
- Reporting a total of 3,554 occasions of online video viewing behaviour
- A greater effect on the reach of a campaign



Questionnaire

A range of questioning techniques were implemented to maintain the quality of the data:

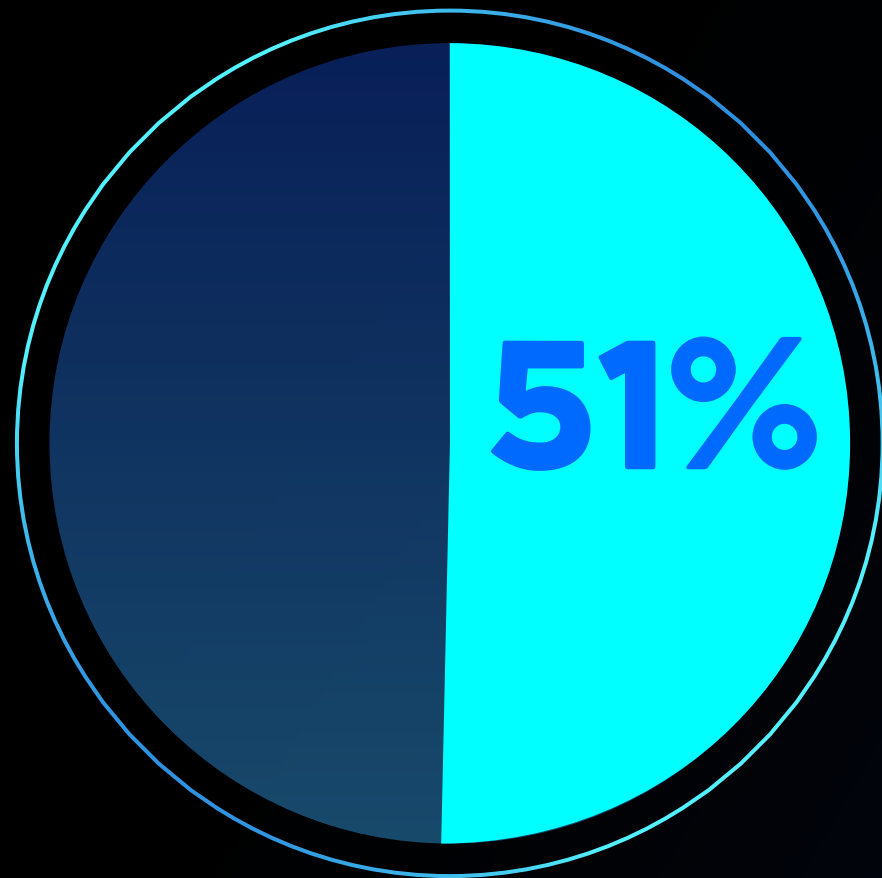
- Top down questioning approach when determining overall behaviour to prevent the summation of errors
- Incorporated cognitive interviewing principles to promote the accurate recall of viewing occasions from consumers' memories
- Focus on occasions that occurred in the last week



Modelling

- Logistic regression was used to determine the impact that different demographic and behavioural factors had on determining incidences of co-viewing
- The model's results were also used to generate a second dataset that increased the reliability of the point estimates of by utilising the points relationship with similar occasions
- CHAID clustering was used to identify key breaks in the data and combinations where co-viewing was most likely

Over half the time when people are watching online video, they're watching **with someone else.**



of online video viewing occasions across all devices are being viewed by more than one person.¹

Source 1: Kantar Research 2019 - Average across all measured video occasions

We then found **three major factors** that influence the dynamics of co-viewing:

**The device
used to
watch**

Time of day

**Content &
genres**

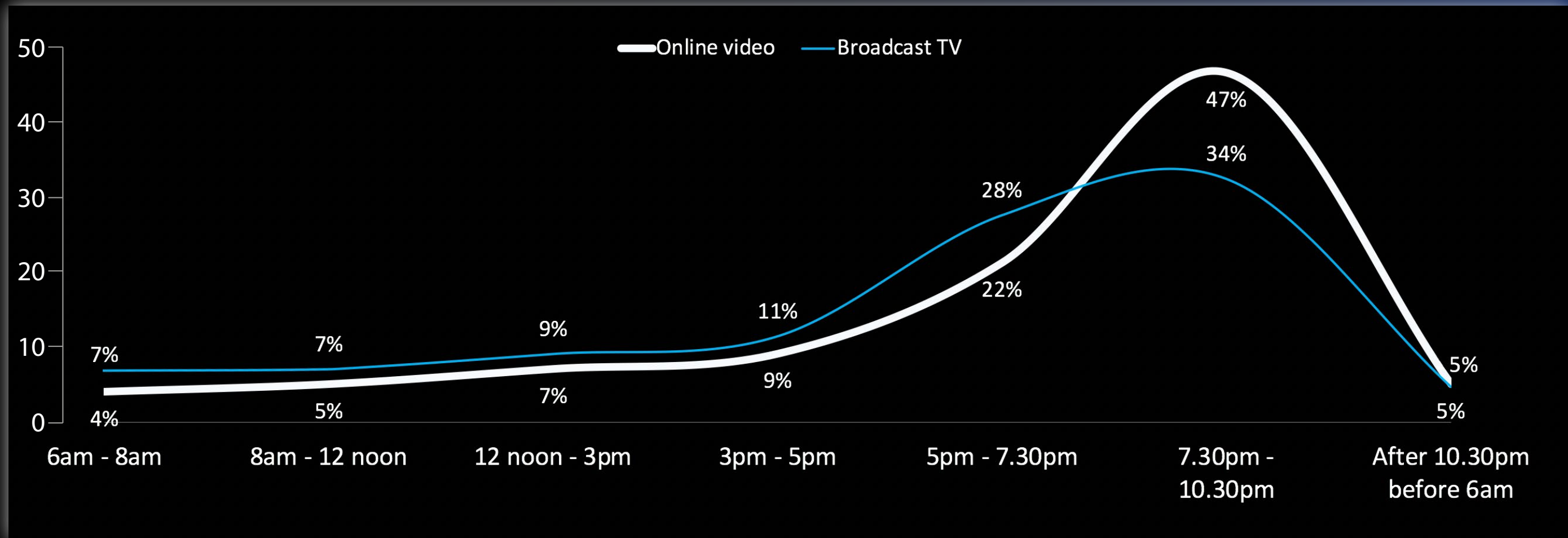
For online video, the device that viewers are using is the **key factor** to whether they watch alone or with others.

The likelihood of co-viewing is higher when the device used is a Connected TV:



It's clear that people love watching together on the big screen, and with more people watching on Connected TVs than ever before, this is only going to **increase**.

Predictably, online video is more likely to be watched later in the evening, while broadcast TV is watched across the whole evening.



Source: Kantar Research 2019 (Online viewing). Nielsen TAM (Broadcast viewing), Total TV, AP15-59, AUD, August 2019, Daypart share of total channel consumption

It's the combination of these factors – as well as the type of content people are watching – that show when it's highly likely more than one person will be

watching together.



Great storytelling has always captivated us, and connecting through the **shared experience** of stories is ingrained in our social fabric.

We see this in the results below that show the likelihood of **adults watching with another adult**.

		Primary Person					
		Male		Female			
		18-39	40-60	18-39	40-60		
Co-viewing Person	Male	Less than 17	17%	14%	14%	14%	
		18-39	12%	6%	45%	6%	
		40-60	6%	5%	12%	41%	
		60+	3%	2%	1%	11%	
	Female	Less than 17	9%	11%	13%	14%	
		18-39	44%	14%	9%	6%	
		40-60	7%	45%	5%	5%	
		60+	3%	2%	1%	4%	
				100%	100%	100%	100%

When targeting a specific demo group, there is a 40-45% probability that the person they are co-viewing with is in the same age group but the opposite gender.

For example, when males aged 18-39 are co-viewing, **44%** of the people they co-view with are females of a similar age and **12%** are males of a similar age.

Note: All online viewing occasions.

More people watch together when you combine premium content and mass reach, with BVOD coming out

higher for co-viewing than other online video platforms.

1.63

BVOD



1.47

Subscription channel



1.42

YouTube



NOTES:
Average occurrence of co-viewing +/- categories individual's impact on co-viewing
(determined by Logistic Regression)

This means that with TVNZ OnDemand you get:

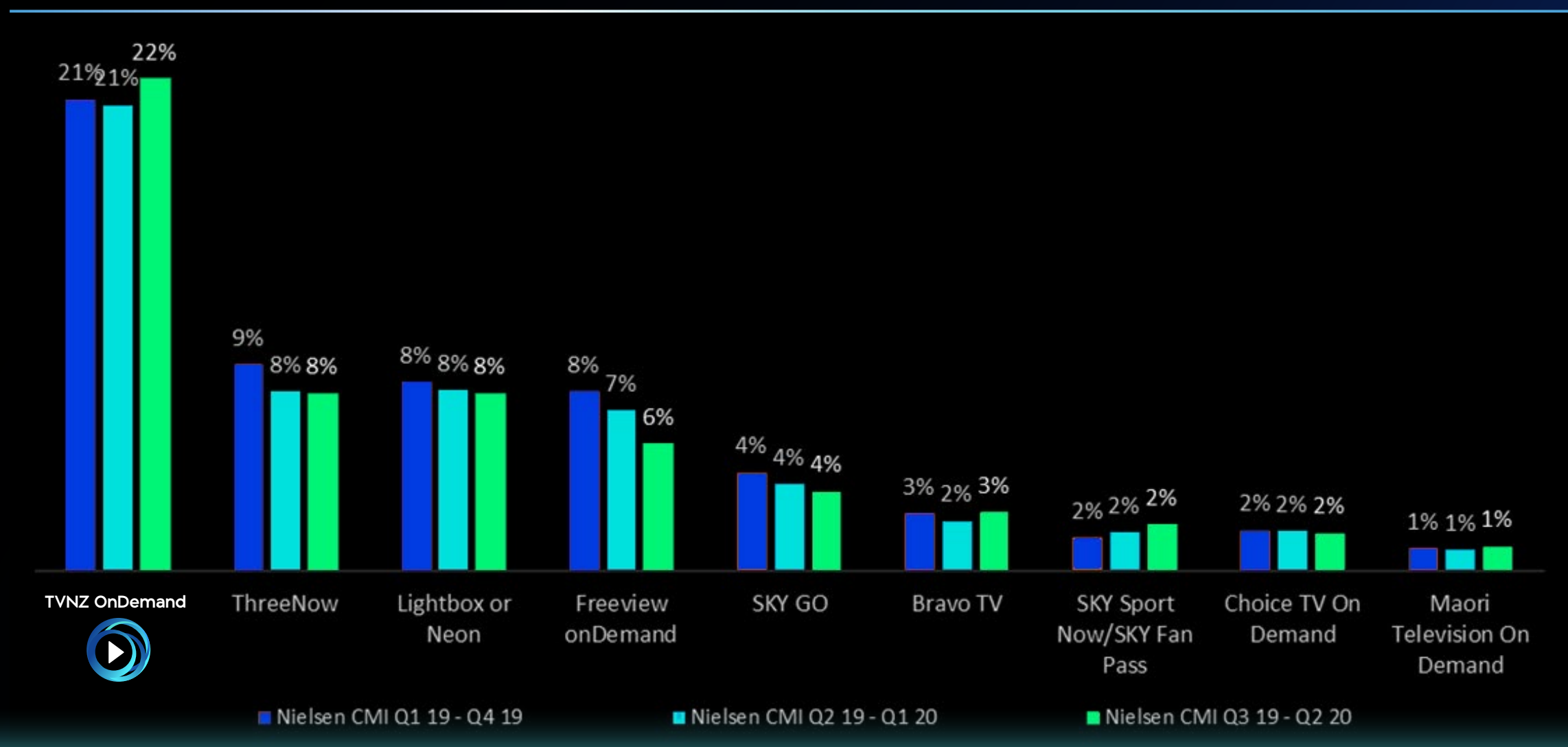
63%

more eyeballs on your brand
when you advertise with us.

TVNZ OnDemand is the biggest BVOD player in the market.

Bigger audiences mean more chances for co-viewing occasions.

Weekly NZ BVOD Reach (Total Pop 10+)





TVNZ OnDemand supported
Connected TV devices:
Chromecast, Samsung TV,
Playstation, Android TV,
Apple TV, Panasonic,
Vodafone TV, Xbox, LG,
Airplay



By device TVNZ OnDemand delivers...

54%

**of impressions on
Connected TV**

52%

**of streams on
Connected TV**

Source: Google Ad Manager & Google Analytics - Jan-Aug 2020



TVNZ OnDemand delivers 57% of impressions to genres that drive a higher incidence of co-viewing including drama, sports, comedy, reality TV, movies and news.

Source: Google Ad Manager & Google Analytics – Jan-Aug 2020



With viewing on Connected TVs, TVNZ OnDemand delivers twice the eyeballs on over half our impressions served...

TVNZ OnDemand has delivered
398 million impressions

**on Connected TVs between
Jan and August 2020**

So factoring in co-viewing, you get approximately
805 million eyeballs

on Connected TV with TVNZ OnDemand!

Connected TVs deliver 24% more eyeballs than other devices. When applied on the average BVOD co-viewing factor of 1.63, this gives us a BVOD Connected TV factor of 2.

Source: Google Ad Manager & Google Analytics - Jan-Aug 2020

Advertising on TVNZ OnDemand gives you the **biggest** online video platform with the **biggest** opportunity for co-viewing:

