BROADCASTER VOD

Premium Entertainment

WHAT'S COVERED

BVOD Market Overview

Why BVOD?

Pricing & Effectiveness BVOD v's TV

BVOD v's Other Video

BVOD MARKET OVERVIEW

ALL 4 IN NUMBERS

24m
REGISTERED VIEWERS

37.3% 1634
YOUNGER THAN FB
(Facebook = 36.7%)

61% ABC1
MORE UPMARKET THAN YT
(Youtube = 57%)

+31%
2020 VIEWING YOY

13,000
HOURS OF CONTENT

28
PLATFORMS & DEVICES

70%+
BIG SCREEN

80%
OF ALL 1634s IN UK

1.7
VIEWERS PER IMPRESSION

98%
COMPLETION RATE (MOAT)

47 MINS
AVERAGE VIEWING YTD

4 SALES

Source: April 2021

ALL 4 IN NUMBERS 2021

FUTURE 4

- DOUBLE ALL 4 VIEWING BY 2025
- DIGITAL ADVERTISING TO BE AT LEAST 30% OF TOTAL REVENUE BY 2025
- CHANNEL 4'S COMISSIONING, SCHEDULING AND COMMERCIAL STRATEGY WILL BE OPTIMISED TOWARDS GROWING VIEWS ON ALL 4

Q1 2021

- OFF TO A GOOD START
- YTD VIEWS UP 73%
- CONSEQUETIVE BIGGEST VIEWING WEEKS IN HISTORY
- ALL CONTENT TYPES UP

ITV IN NUMBERS

32m
REGISTERED VIEWERS

45% 1634
VIEWING

52% ABC1
VIEWING

+35%
VIEWING DES DRAMA

10,000
TARGETING OPTIONS

30
PLATFORMS & DEVICES

66%
BIG SCREEN

1.7
VIEWERS PER IMPRESSION

98%
COMPLETION RATE

35%
LIVE STREAMING

sky IN NUMBERS

30m
Adults every month
Across VOD portfolio

10m
Households with
SKY AdSmart

40% pop
SKY AdSmart reach of population

5,000
CUSTOMER PANEL

1.7
VIEWERS PER
IMPRESSION

75
Of TOP 100 advertisers
have used SKY AdSmart

200
DATA ATTRIBUTES

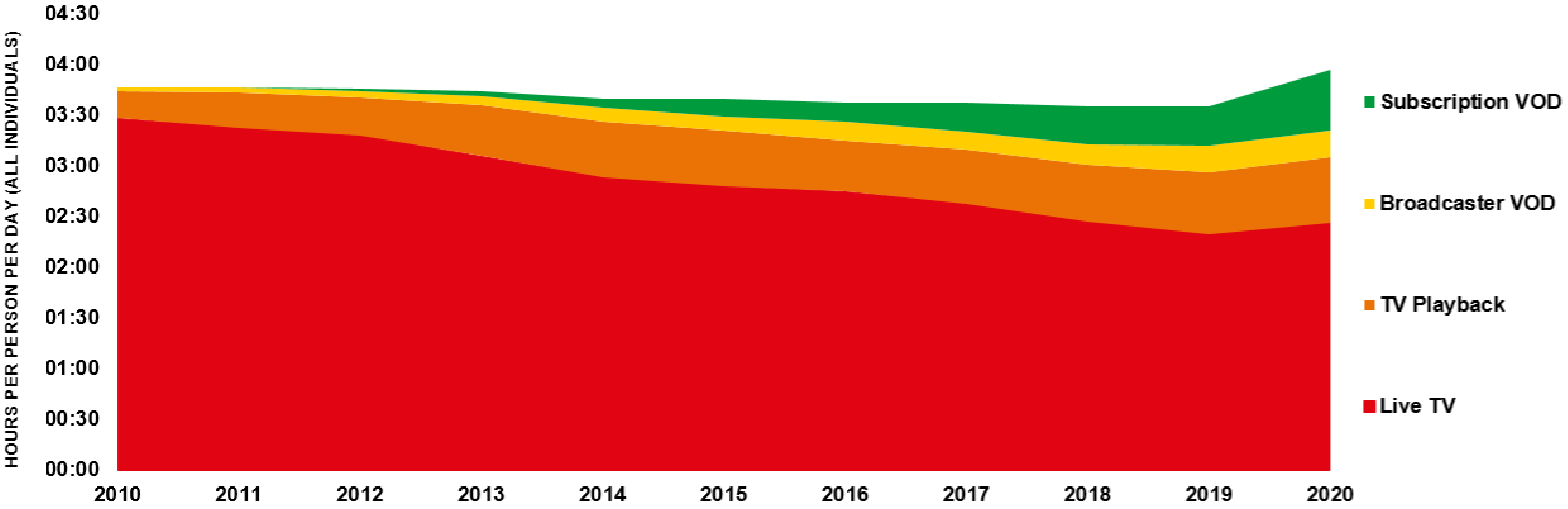
98%
COMPLETION RATE

1,000s
SME businesses use
AdSmart

47%
AdSmart reduction in
Channel switching

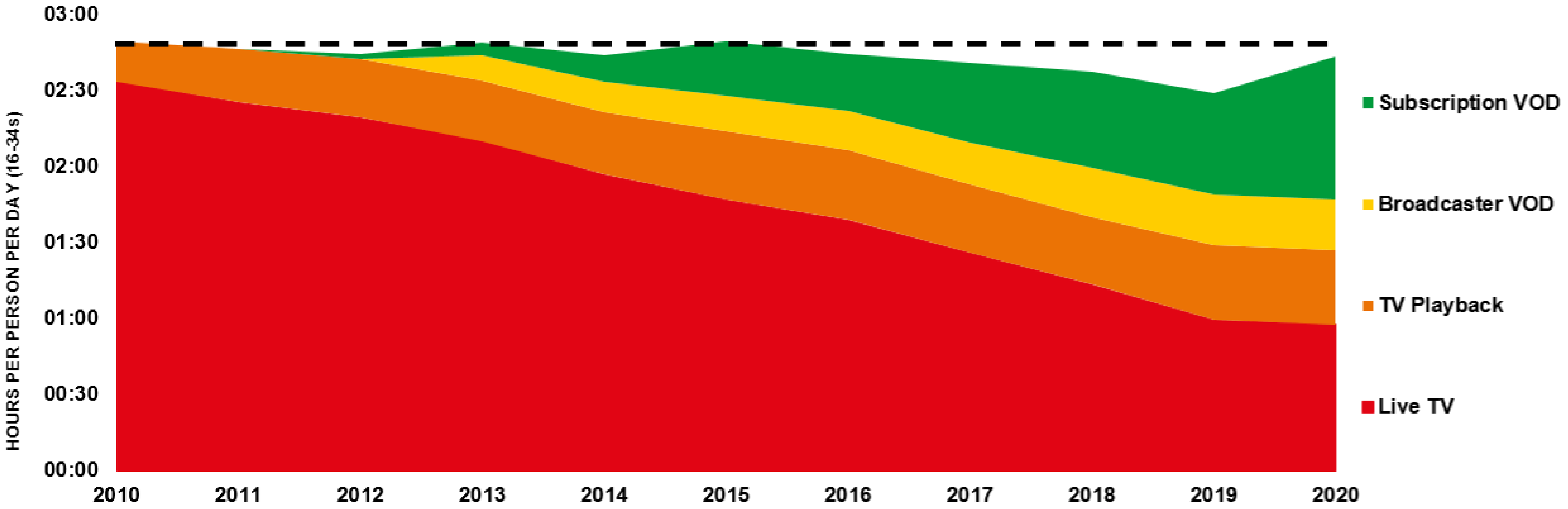
21%
AdSmart increases
Propensity to buy

ALL FORMS OF TV HAVE SEEN GROWTH IN 2020



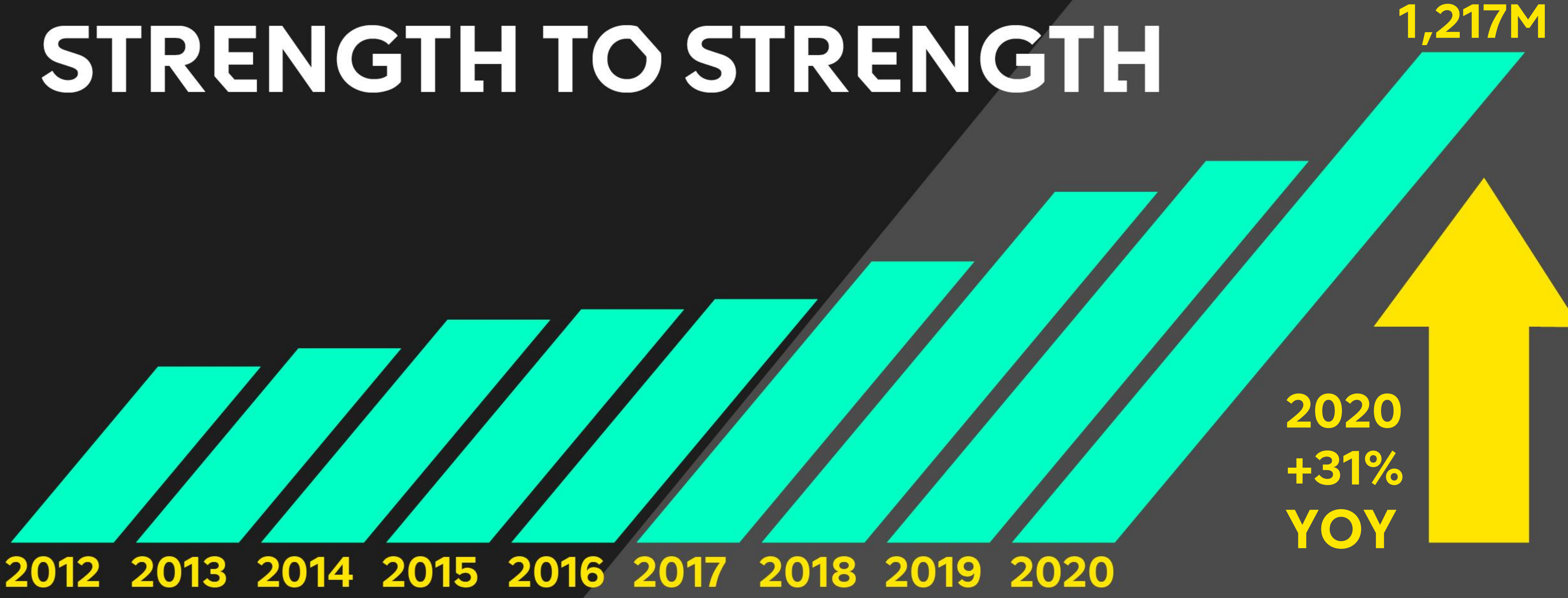
Source: 2010-2020, BARB / Broadcaster stream data / IPA Touchpoints 2020, Individuals

YOUNG PEOPLE'S VIEWING IS INCREASINGLY SPREAD ACROSS PLATFORMS

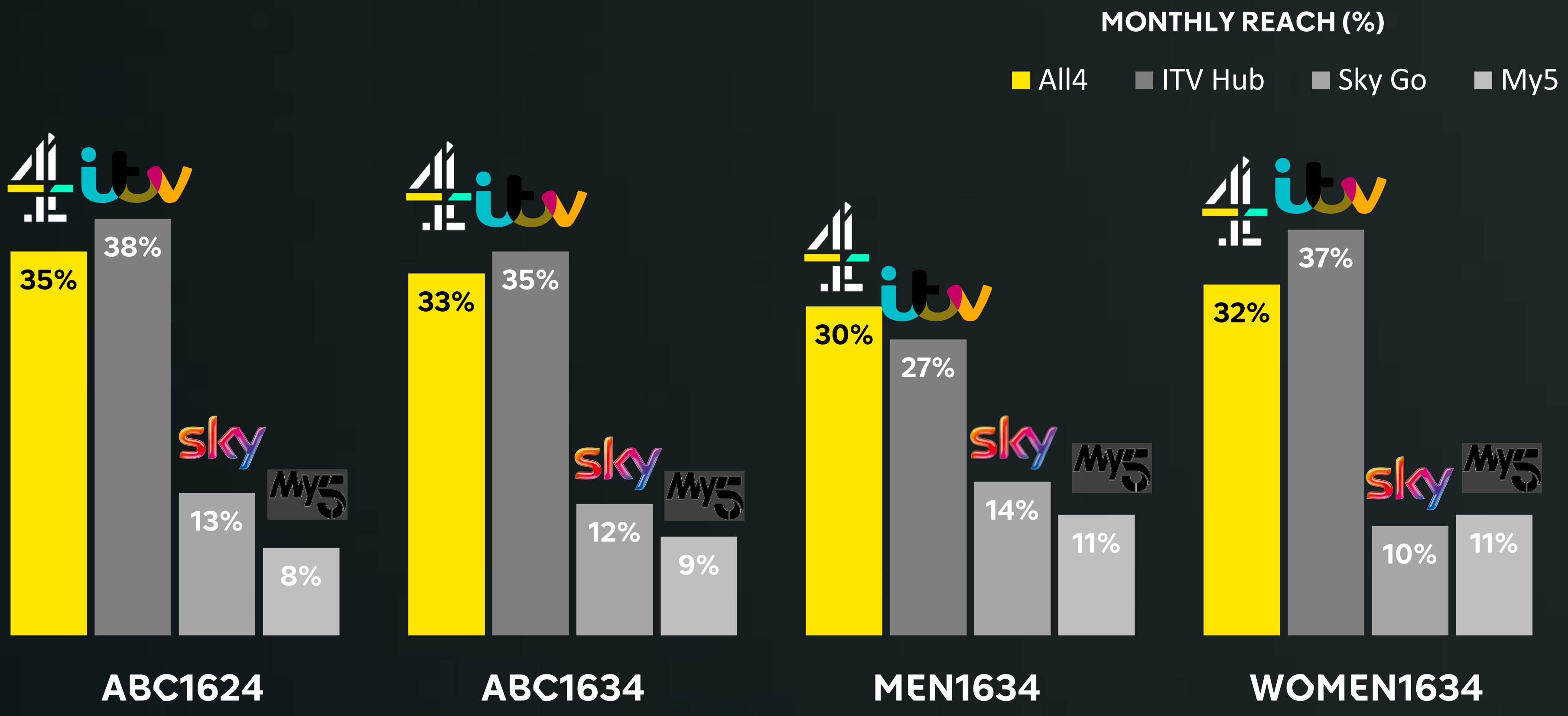


Source: 2010-2020, BARB / Broadcaster stream data / IPA Touchpoints 2020, 16-34

ALL 4 VIEWING IS GOING FROM STRENGTH TO STRENGTH



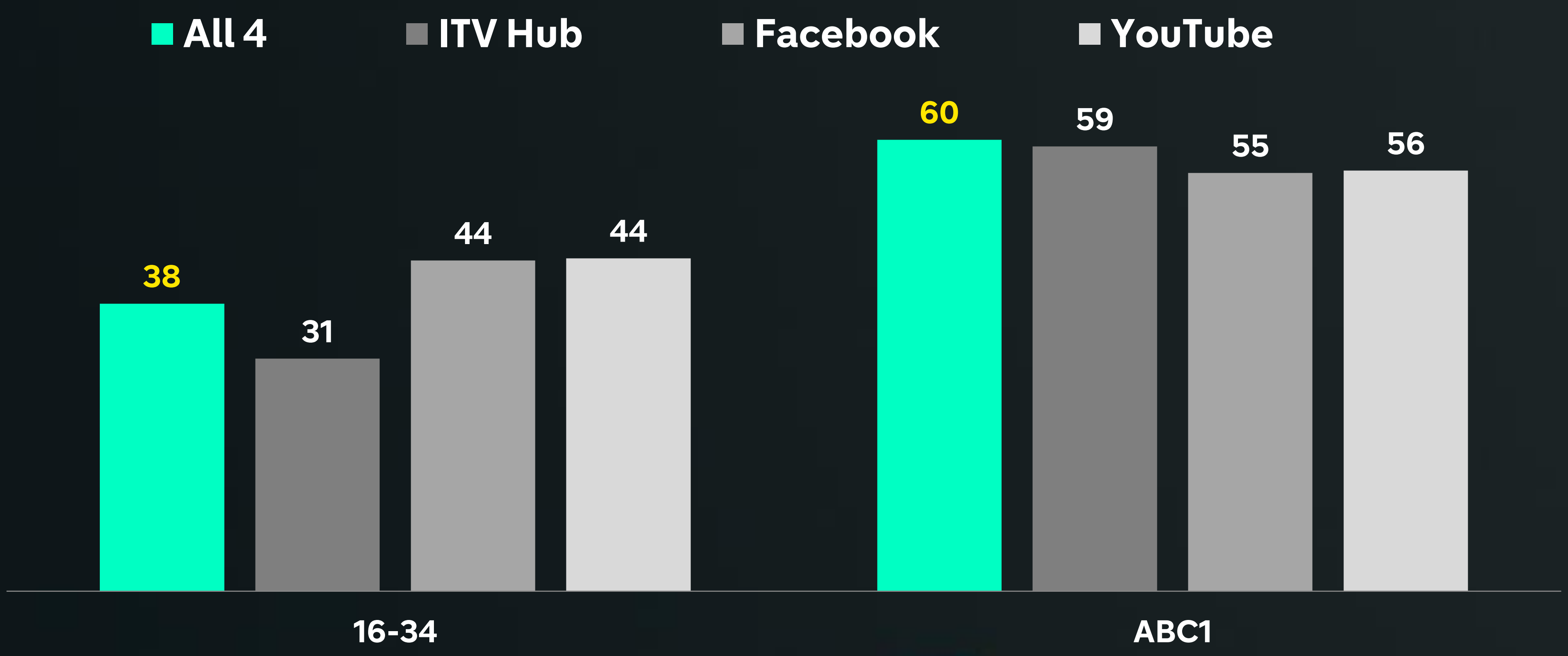
BVOD DELIVERS COMPETITIVE YOUNG & UPMARKET REACH



Note: Sample period during Love Island

Source: IPA Touchpoints 2020

UPMARKET VIDEO PLAYER PROFILE



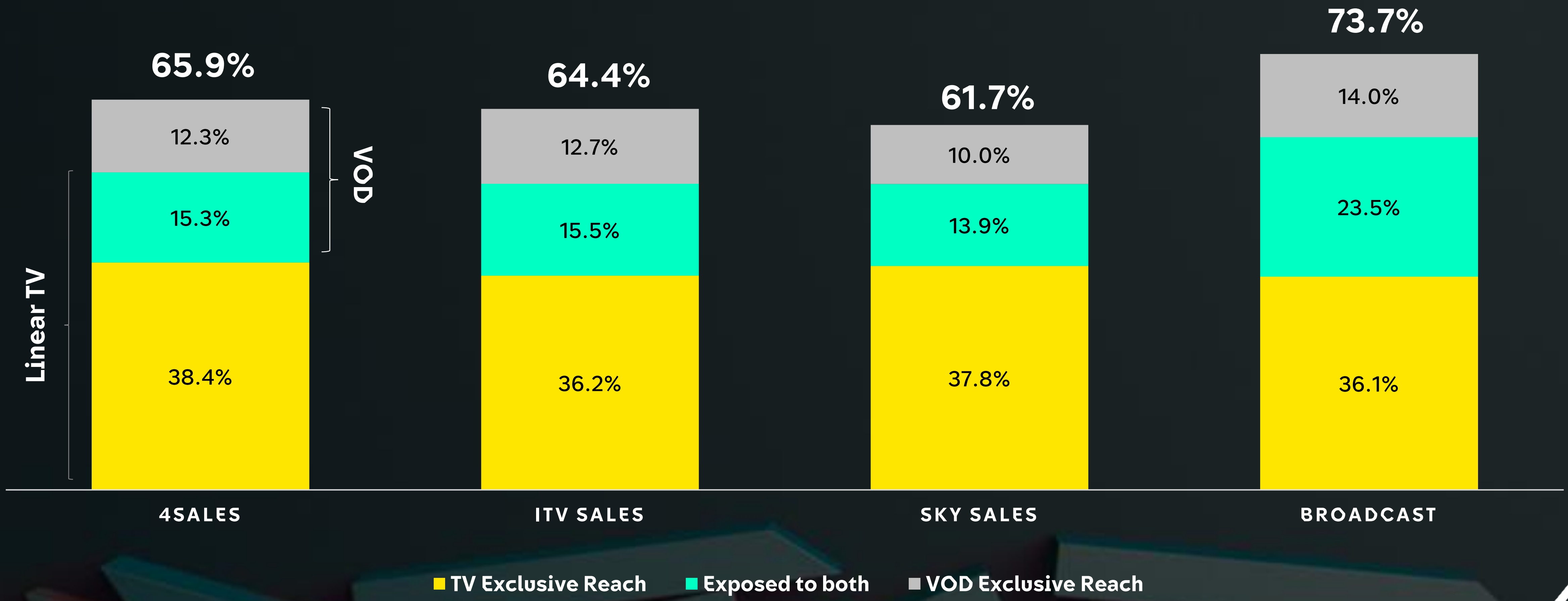
All 4 is the **most upmarket** of all the commercial TV players with Adults ABC1s making up 60% of it's audience each month…

And when it comes to the digital platforms it's more **upmarket** than YouTube and Facebook!

Source: IPA Touchpoints 2020

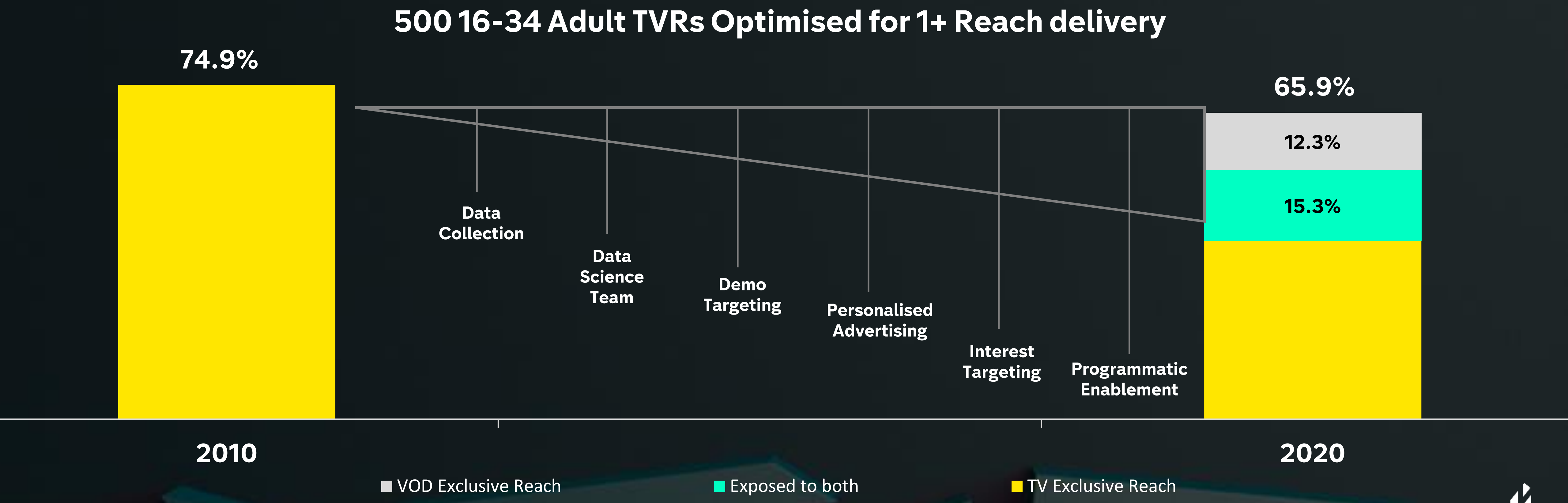
SALES HOUSE REACH AND THE CONTRIBUTION OF BVOD

500 TVRs vs 16-34 Adults



Source: BARB / IPA Touchpoints: 2020 VOD weight at 20% of total GRPs, reach calculated at Sales house level, rating splits in line with Adult impact delivery

C4'S REACH HAS EVOLVED OFFERING NEW TARGETING OPPORTUNITIES FOR ADVERTISERS



Source: BARB / IPA Touchpoints: 2018 VOD weight at 20% of total GRPs, reach calculated at Sales house level

ALL 4 IN YOUGOV'S UK TOP 5 BIGGEST MOVERS

YouGov

UK TOP 5 BIGGEST MOVERS : MARCH 2021

RANK	BRAND NAME	Media Metrics: Adaware	Media Metrics: WOM	Media Metrics: Buzz	Brand Health Metrics: Awareness	Brand Health Metrics: Index	Brand Health Metrics: Quality	Brand Health Metrics: Value	Brand Health Metrics: Impression	Brand Health Metrics: Reputation	Brand Health Metrics: Satisfaction	Brand Health Metrics: Recommend	Purchase Funnel: Consideration	Purchase Funnel: Purchase Intent	Purchase Funnel: Current Customer
1	Star	▲	▲		▲		▲		▲	▲	▲	▲	▲		▲
2	All 4	▲	▲	▲		▲		▲	▲		▲	▲			▲
3	Quorn	▲	▲					▲	▲		▲	▲	▲		▲
4	Center Parcs	▲	▲		▲	▲			▲		▲		▲		
5	Samsung Home Entertainment		▲	▲	▲	▲		▲		▲		▲			

Methodology: Month on month data comparison showing increases across all metrics, with data comparing January and February 2021

New series of YouGov BrandIndex Biggest Brand Movers, which reveal the top five brands that are **resonating the most positively** among UK consumers across all BrandIndex metrics every month throughout 2021.

All 4 took second place after record-high streaming numbers in January 2021! With uplifts across all three media metrics, a number of brand health metrics, and current customer scores increased.

Source: Internal All 4 view data

WHY BVOD?

WHY THE HELL NOT!

High Quality Programming
Immense Scale
Premium Environment
Brand Safe
Best of TV
Fully Viewed
Fully Viewable
Rich 1st Party Data
Custom Audiences
Data Match
Big Screen
Sound On
Shared Viewing
Extend Campaign Reach
Evolving Measurement
Geo -Targeting
Simplified Buying

BROADCASTER VOD: THE BIGGER PICTURE

70%

Bvod viewers watch on the big screen: vod is telly

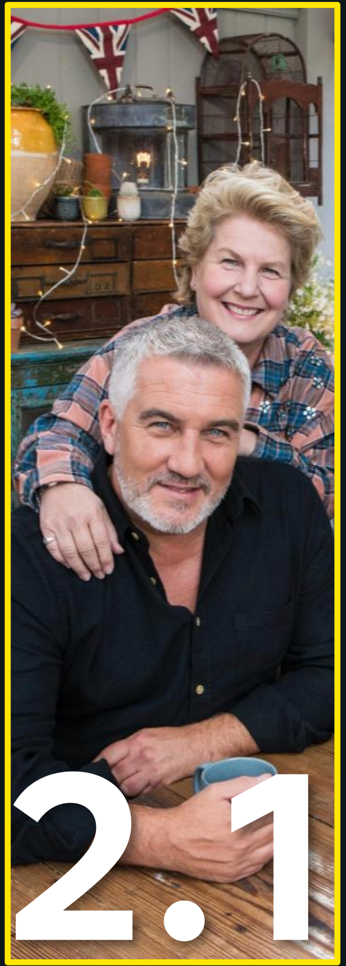
1.6

Viewers per view: impressions alone don't tell the bigger picture

+15% increase in purchase consideration
When added to linear

3.5x greater attn than other vod; 96% completion, non-skippable, full audio

WHAT DOES THIS MEAN FOR GBBO?



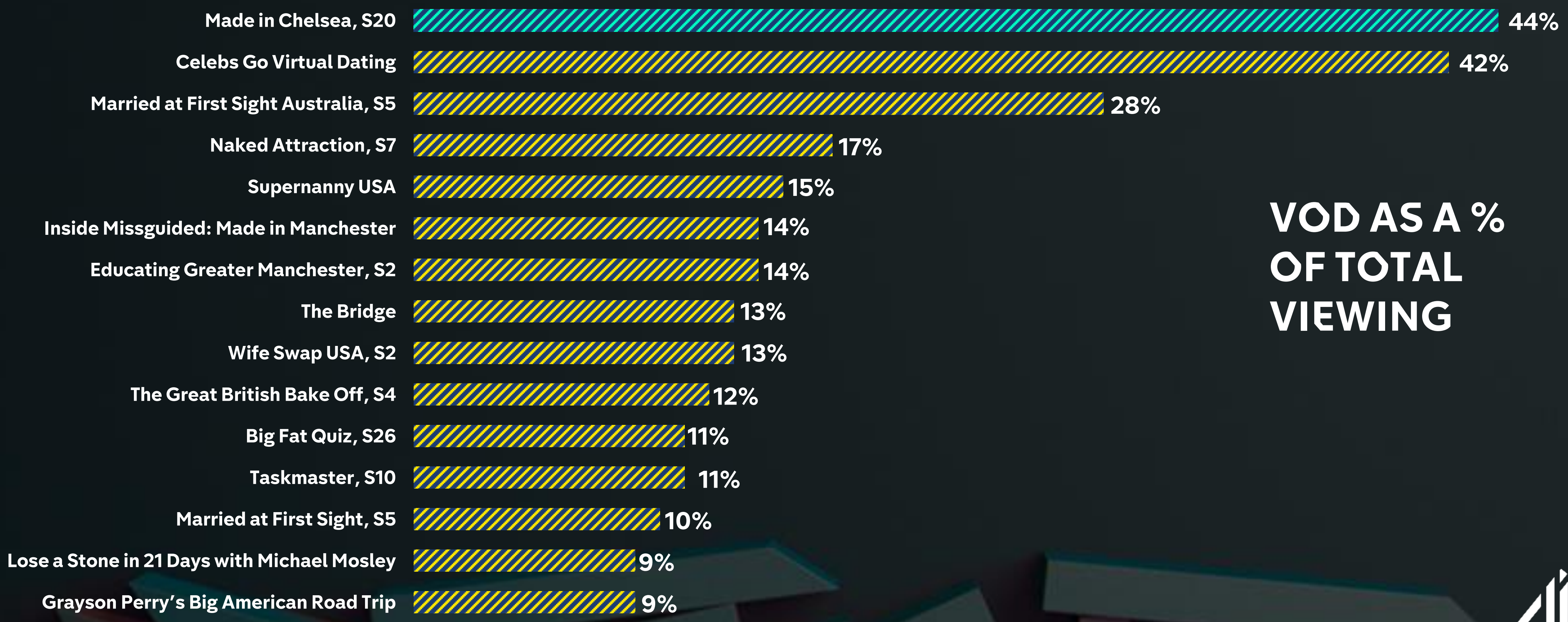
1,000 impressions bought

For every 1,000 16-34 impressions running in GBBO

+ 500 additional in target
You get 1,500 actual 16-34 impressions

+600 additional ‘out of target’
And a total of 2,100 impacts including ‘out of target’ (e.g.. Parents, teenagers)

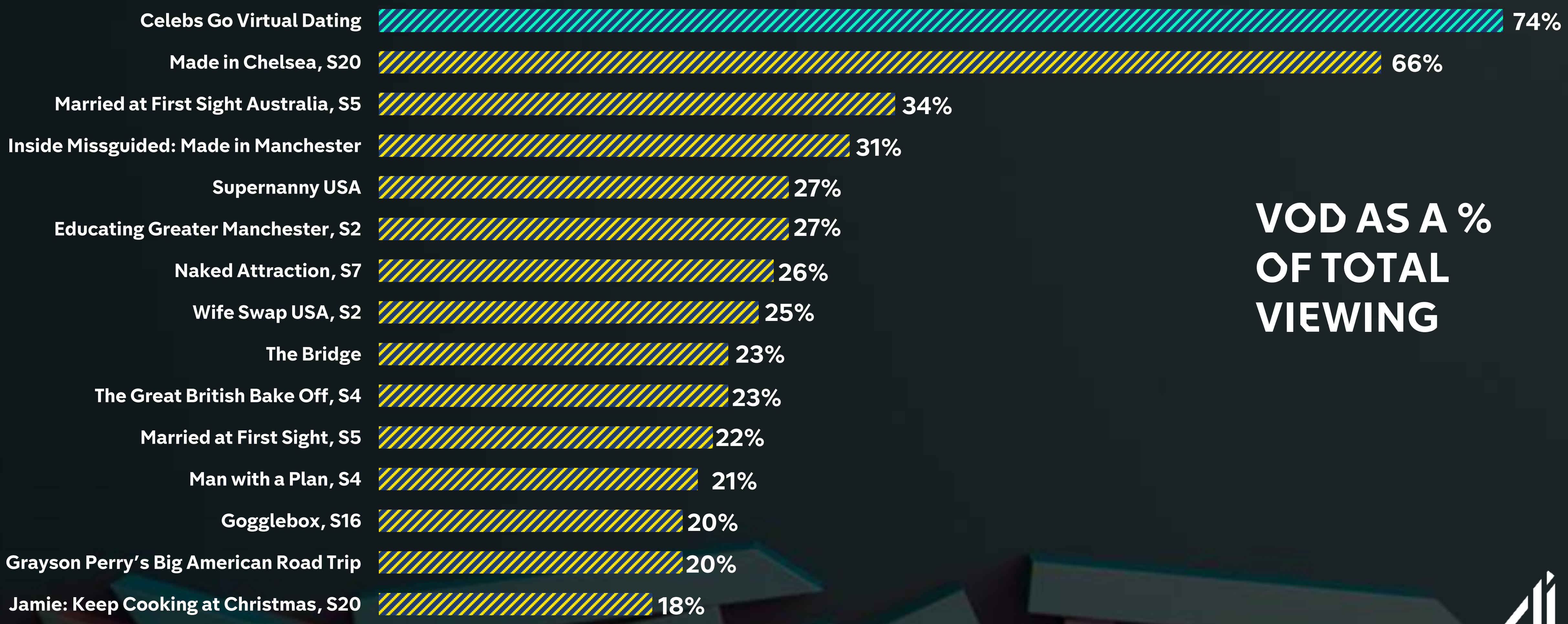
ALL 4 INCREASINGLY DELIVERS A LARGER SHARE OF VIEWING – INDIVIDUALS



VOD AS A % OF TOTAL VIEWING

Source: All 4 internal data H2 2020 01/07/20-31/12/20 linear and VoD viewing time de-duped, Individuals

ALL 4 INCREASINGLY DELIVERS A LARGER SHARE OF VIEWING – 16-34s



Source: All 4 internal data H2 2020 01/07/20-31/12/20 linear and VoD viewing time de-duped, 16-34 year olds

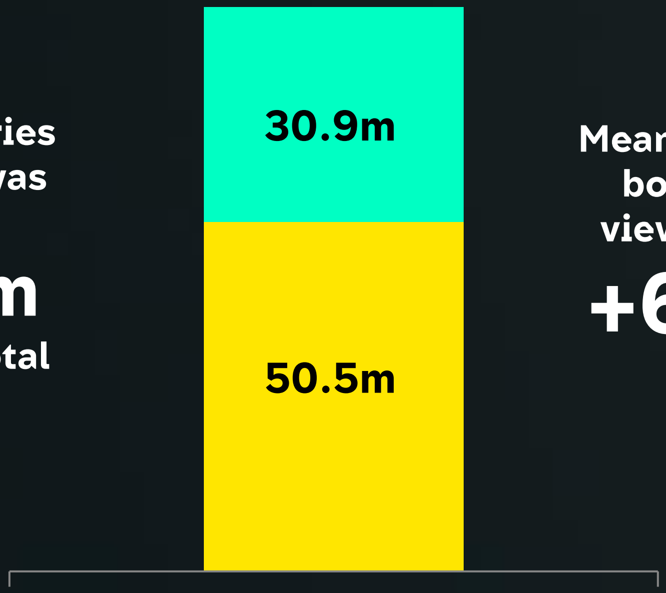
SERIES 6 OF MARRIED AT FIRST SIGHT AUSTRALIA WAS VIEWED 81.4M TIMES

Target = Individuals

The 6th series (40 eps) was viewed
81.4m
times in total

Audience

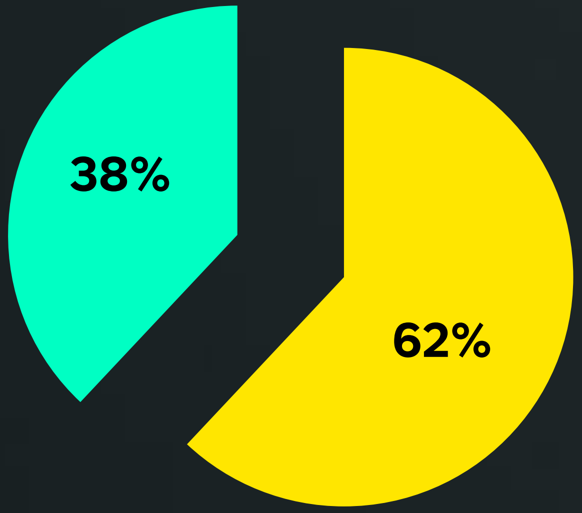
Linear All4



Meaning VoD boosted viewing by
+61%

Share of viewing

Linear All4



Source: BARB Dovetail Individuals 4+. TV VoD separated from total TV number by using 0.7 factor from Project Firefly (i.e. 70% of VoD Viewing is on the big screen, so taking small screen Dovetail figure as 30% of total VoD), includes repeat. Estimate using All 4 internal data.

YOUNG VIEWERS WATCHED SERIES 6 22.8M TIMES

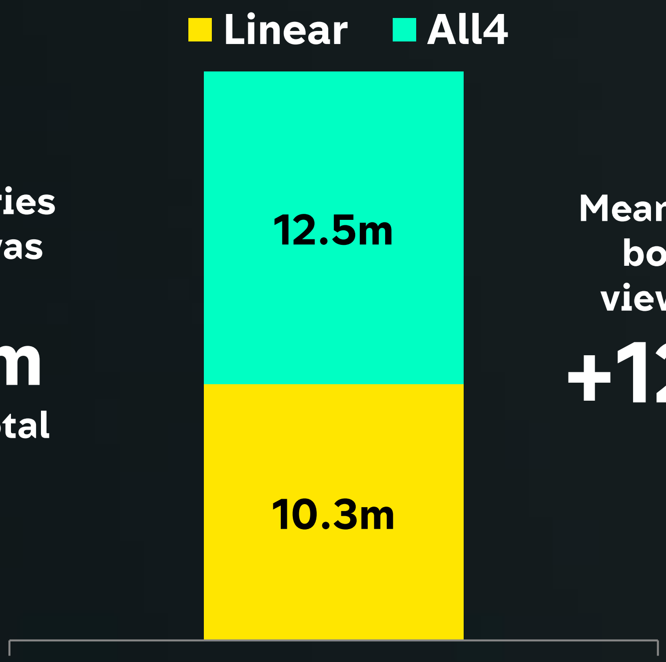
Target = 16-34s

The 6th series (40 eps) was viewed

22.8m

times in total

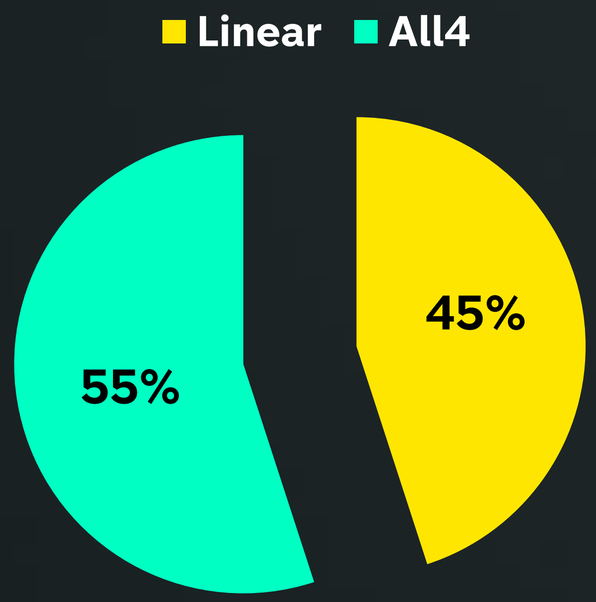
Audience



Meaning VoD boosted viewing by

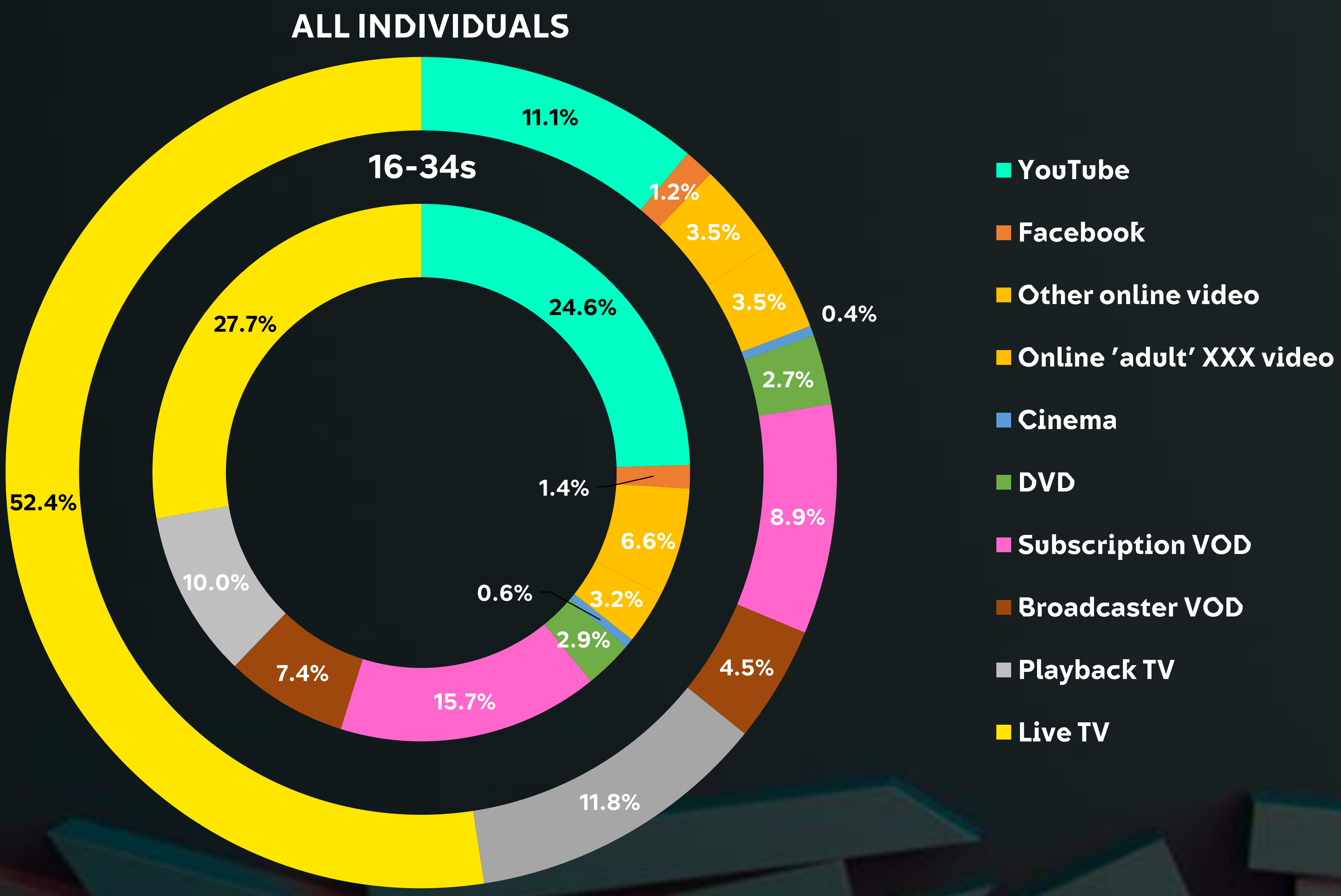
+122%

Share of viewing



Source: BARB Dovetail 16-34 year olds, TV VoD separated from total TV number by using 0.7 factor from Project Firefly (i.e. 70% of VoD Viewing is on the big screen, so taking small screen Dovetail figure as 30% of total VoD), includes repeat. Exc smartphone. Estimate using All 4 internal data.

TV ACCOUNTS FOR 69% OF OUR VIDEO DAY



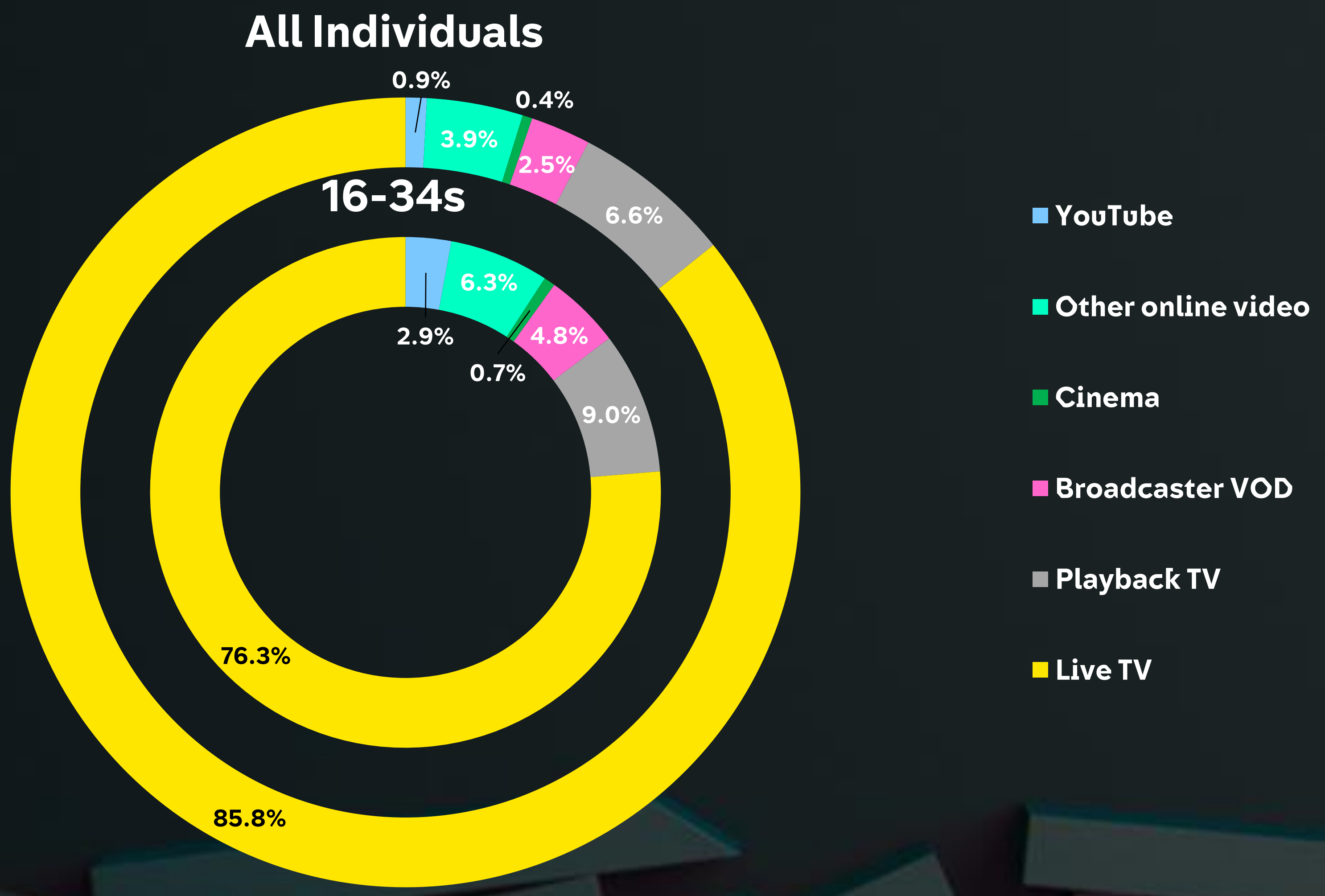
AVERAGE VIDEO TIME PER DAY

All Individuals: 4hrs, 41 mins

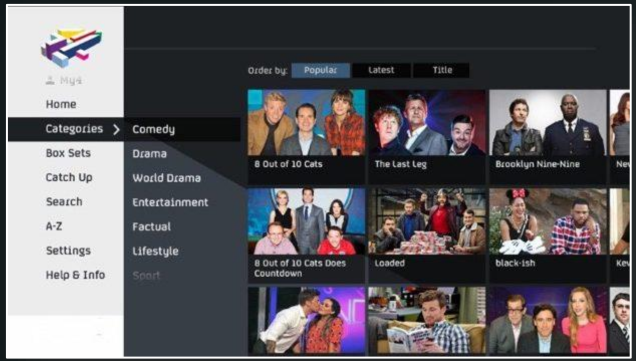
16-34s: 4hrs, 25 mins

Source: 2018, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2018 / Rentrak

BUT 95% OF AD VIEWING TIME



TV IS EVERYWHERE & BVOD IS TV



Live TV

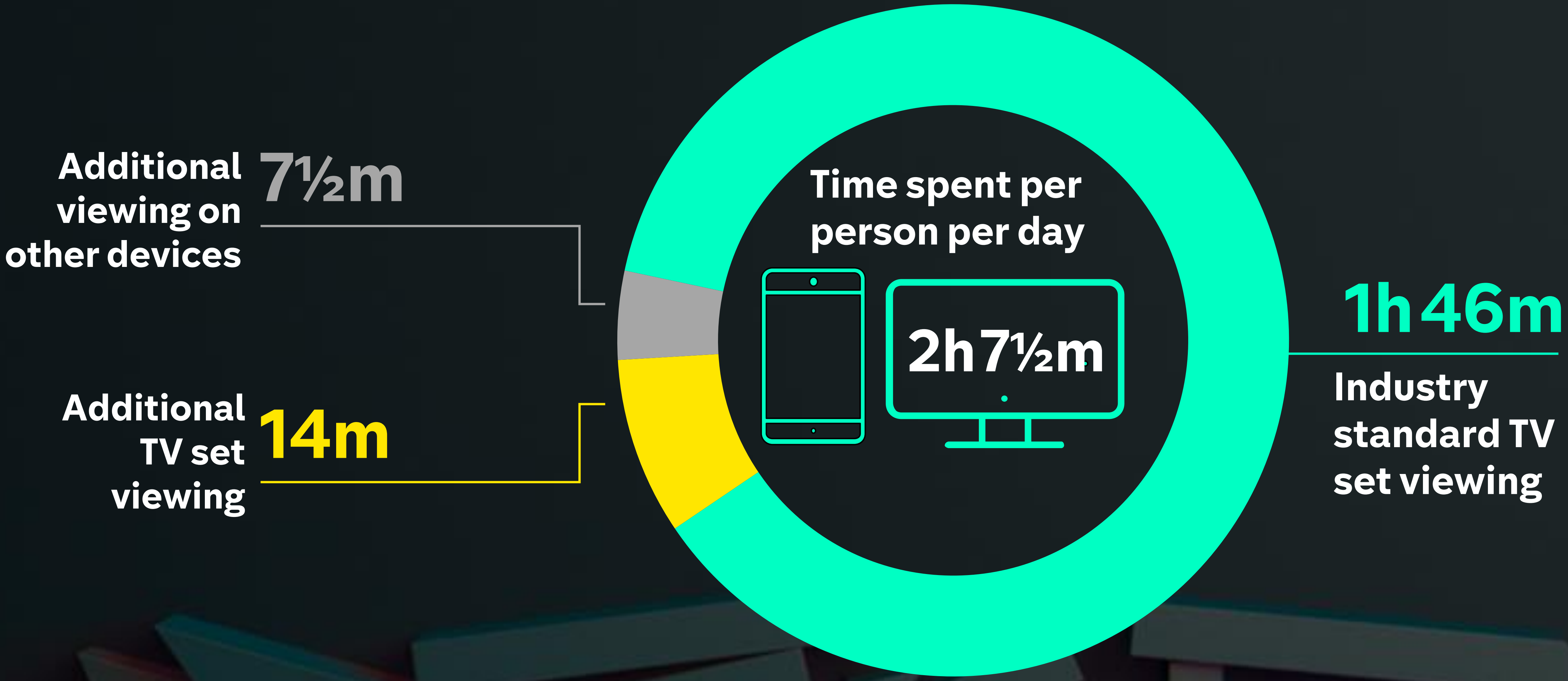
On demand on Smart TVs

On demand on S-Vod

On demand on tablet and mobile

TV houre watched per day on a TV set

THERE'S AN ADDITIONAL 20% OF TV VIEWING ON TOP OF 'INDUSTRY STANDARD' FOR 16-34S



Source: BARB and UK broadcaster data, 2018, 16-34

PRICING & EFFECTIVENESS

DIGITAL MEASUREMENT TOOLS

C FLIGHT

BARB PLANNING TOOL

IPA TOUCHPOINTS

Currently in development

Campaign reach & frequency across BVoD & linear

Available via Techedge

CFlight

Channel 4 data

BARB Data

Modelled by RSMB to deduplicate

But how much BVOD is enough?

THE METHODOLOGY

- IPA channel planning software on 200+ scenarios.
- The costs used reflect current SAP for linear TV and a typical BVOD CPM based at £30
- Impressions for BVOD are converted to impacts using on-target viewer per view factors, obtained as part of Project Firefly which recorded 27,000 separate BVOD viewing occasions, quantifying the volume and profile of those who were exposed.
- All major BVOD players (All4, ITV Hub, Sky Go, My5 and UKTV) have been used in the channel planning, with investment share in-line with volume of viewing as reported by BARB's 4-screen viewing reports.

- How Brands Grow: What Marketers Don't Know. Prof. Byron Sharp 2010
- Media In Focus: Marketing Effectiveness in the Digital Era. Les Binet & Peter Field 2017
- Project Firefly: The Bigger Picture. Research by C4 and ITV 2018
- Profit Ability: the business case for Advertising. Research by Thinkbox 2018

New Planning Tool Demonstrates an Under Investment in BVOD

1634 Adults		Percentage of Total Budget inveseted into Broadcaster VOD												
		0%	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	55%	60%
Total Budget		Modelled 1+ Reach vs the target audience												
£ 250,000	Combined	32%	34%	34%	35%	35%	36%	35%	36%	36%	36%	36%	36%	36%
	BVOD	0%	3%	6%	9%	11%	13%	15%	16%	18%	19%	20%	22%	23%
	TV	32%	31%	30%	29%	28%	28%	25%	25%	23%	22%	20%	19%	17%
	Incremental BVOD	0%	2%	4%	6%	7%	9%	11%	12%	13%	15%	16%	17%	18%
£ 500,000	Combined	45%	47%	49%	50%	50%	51%	51%	51%	52%	52%	51%	51%	50%
	BVOD	0%	6%	11%	15%	18%	20%	23%	25%	26%	28%	29%	30%	31%
	TV	45%	44%	43%	42%	41%	39%	38%	37%	35%	34%	32%	30%	28%
	Incremental BVOD	0%	3%	6%	8%	10%	12%	13%	15%	16%	17%	19%	20%	22%
£ 750,000	Combined	52%	55%	57%	58%	59%	60%	60%	60%	60%	60%	59%	59%	58%
	BVOD	0%	9%	15%	19%	23%	26%	28%	30%	31%	33%	34%	35%	36%
	TV	52%	51%	50%	49%	48%	47%	46%	44%	43%	41%	39%	38%	35%
	Incremental BVOD	0%	4%	7%	9%	11%	12%	14%	16%	17%	18%	20%	21%	22%
£ 1,000,000	Combined	56%	60%	62%	63%	64%	65%	65%	65%	65%	65%	64%	63%	63%
	BVOD	0%	11%	18%	23%	26%	29%	31%	33%	35%	36%	37%	38%	39%
	TV	56%	55%	54%	54%	53%	52%	51%	49%	48%	46%	45%	43%	41%
	Incremental BVOD	0%	4%	7%	10%	11%	13%	14%	16%	17%	18%	19%	21%	22%
£ 1,250,000	Combined	59%	63%	65%	67%	68%	68%	69%	69%	68%	68%	68%	67%	66%
	BVOD	0%	13%	20%	26%	29%	32%	34%	36%	37%	38%	39%	40%	41%
	TV	59%	58%	57%	57%	56%	55%	54%	53%	52%	51%	49%	47%	45%
	Incremental BVOD	0%	5%	8%	10%	12%	13%	14%	16%	17%	18%	19%	20%	21%
£ 1,500,000	Combined	62%	66%	69%	70%	70%	71%	71%	71%	71%	71%	70%	69%	69%
	BVOD	0%	15%	23%	28%	31%	34%	36%	38%	39%	40%	41%	41%	42%
	TV	62%	62%	61%	60%	59%	57%	56%	56%	54%	53%	52%	50%	48%
	Incremental BVOD	0%	5%	8%	10%	12%	13%	15%	15%	16%	17%	18%	19%	21%
£ 1,750,000	Combined	64%	69%	71%	72%	73%	73%	73%	73%	73%	72%	72%	71%	70%
	BVOD	0%	16%	25%	30%	33%	36%	38%	39%	40%	41%	42%	42%	43%
	TV	64%	64%	63%	62%	61%	60%	59%	58%	56%	55%	54%	52%	51%
	Incremental BVOD	0%	5%	8%	10%	12%	13%	14%	15%	16%	17%	18%	19%	20%
£ 2,000,000	Combined	66%	71%	73%	74%	75%	75%	75%	75%	74%	74%	73%	73%	72%
	BVOD	0%	18%	26%	31%	35%	37%	39%	40%	41%	42%	43%	43%	44%
	TV	66%	65%	65%	64%	63%	62%	61%	60%	59%	57%	56%	54%	53%
	Incremental BVOD	0%	5%	8%	10%	12%	13%	14%	15%	16%	17%	18%	18%	19%

New Planning Tool Demonstrates an Under Investment in BVOD

ABC1 Adults		Percentage of Total Budget invested into Broadcaster VOD												
		0%	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	55%	60%
Total Budget		Modelled 1+ Reach vs the target audience												
£ 250,000	Combined	56%	57%	56%	57%	57%	57%	56%	56%	54%	54%	52%	52%	50%
	BVOD	*0%*	*3%*	*6%*	*8%*	*11%*	*12%*	*14%*	*16%*	*17%*	*18%*	*19%*	*20%*	*21%*
	TV	*56%*	*55%*	*54%*	*53%*	*52%*	*50%*	*49%*	*47%*	*45%*	*43%*	*40%*	*39%*	*36%*
	Incremental BVOD	*0%*	*2%*	*3%*	*4%*	*5%*	*6%*	*7%*	*8%*	*9%*	*11%*	*12%*	*13%*	*14%*
£ 500,000	Combined	68%	69%	69%	70%	71%	71%	70%	70%	70%	69%	68%	67%	66%
	BVOD	*0%*	*6%*	*11%*	*14%*	*17%*	*19%*	*21%*	*23%*	*25%*	*26%*	*27%*	*28%*	*29%*
	TV	*68%*	*67%*	*66%*	*65%*	*64%*	*63%*	*62%*	*61%*	*60%*	*57%*	*56%*	*54%*	*52%*
	Incremental BVOD	*0%*	*2%*	*4%*	*5%*	*6%*	*7%*	*8%*	*9%*	*10%*	*11%*	*12%*	*13%*	*14%*
£ 750,000	Combined	74%	76%	77%	78%	78%	77%	77%	76%	76%	76%	75%	74%	73%
	BVOD	*0%*	*8%*	*14%*	*18%*	*21%*	*24%*	*26%*	*28%*	*29%*	*30%*	*31%*	*32%*	*33%*
	TV	*74%*	*74%*	*73%*	*72%*	*71%*	*70%*	*69%*	*67%*	*66%*	*65%*	*63%*	*61%*	*60%*
	Incremental BVOD	*0%*	*2%*	*4%*	*5%*	*6%*	*7%*	*8%*	*9%*	*10%*	*11%*	*12%*	*13%*	*14%*
£ 1,000,000	Combined	78%	79%	80%	81%	81%	81%	81%	81%	81%	80%	79%	78%	77%
	BVOD	*0%*	*11%*	*17%*	*21%*	*25%*	*27%*	*29%*	*31%*	*32%*	*33%*	*34%*	*35%*	*35%*
	TV	*78%*	*77%*	*76%*	*76%*	*75%*	*74%*	*74%*	*73%*	*71%*	*70%*	*68%*	*66%*	*64%*
	Incremental BVOD	*0%*	*2%*	*4%*	*5%*	*6%*	*7%*	*8%*	*9%*	*9%*	*10%*	*11%*	*12%*	*13%*
£ 1,250,000	Combined	80%	82%	83%	84%	84%	84%	84%	83%	83%	83%	82%	81%	80%
	BVOD	*0%*	*12%*	*19%*	*24%*	*27%*	*29%*	*31%*	*33%*	*34%*	*35%*	*36%*	*36%*	*37%*
	TV	*80%*	*80%*	*79%*	*79%*	*78%*	*77%*	*76%*	*75%*	*74%*	*73%*	*72%*	*70%*	*68%*
	Incremental BVOD	*0%*	*3%*	*4%*	*5%*	*6%*	*7%*	*8%*	*8%*	*9%*	*9%*	*10%*	*11%*	*12%*
£ 1,500,000	Combined	82%	84%	85%	85%	86%	86%	86%	85%	85%	84%	84%	83%	82%
	BVOD	*0%*	*14%*	*21%*	*26%*	*29%*	*31%*	*33%*	*34%*	*35%*	*36%*	*37%*	*38%*	*38%*
	TV	*82%*	*81%*	*81%*	*80%*	*80%*	*79%*	*78%*	*77%*	*76%*	*75%*	*74%*	*73%*	*71%*
	Incremental BVOD	*0%*	*3%*	*4%*	*5%*	*6%*	*7%*	*7%*	*8%*	*9%*	*9%*	*10%*	*10%*	*11%*
£ 1,750,000	Combined	83%	85%	86%	87%	87%	87%	87%	87%	86%	86%	85%	85%	84%
	BVOD	*0%*	*16%*	*23%*	*28%*	*31%*	*33%*	*34%*	*36%*	*36%*	*37%*	*38%*	*38%*	*39%*
	TV	*83%*	*83%*	*82%*	*82%*	*81%*	*80%*	*80%*	*79%*	*78%*	*77%*	*76%*	*75%*	*74%*
	Incremental BVOD	*0%*	*3%*	*4%*	*5%*	*6%*	*6%*	*7%*	*7%*	*8%*	*9%*	*9%*	*10%*	*10%*
£ 2,000,000	Combined	84%	86%	87%	88%	88%	88%	88%	88%	87%	87%	86%	86%	85%
	BVOD	*0%*	*17%*	*25%*	*29%*	*32%*	*34%*	*35%*	*36%*	*37%*	*38%*	*39%*	*39%*	*39%*
	TV	*84%*	*84%*	*83%*	*83%*	*82%*	*82%*	*81%*	*80%*	*80%*	*79%*	*78%*	*76%*	*75%*
	Incremental BVOD	*0%*	*3%*	*4%*	*5%*	*6%*	*6%*	*7%*	*7%*	*8%*	*8%*	*9%*	*9%*	*10%*

Total TV builds cost effective reach

Source: BARB BVOD Planner (6 weeks 29th June to 9th August 2020) / natural delivery using station average price for 2019 (to avoid COVID deflated 2020 pricing)

4 SALES

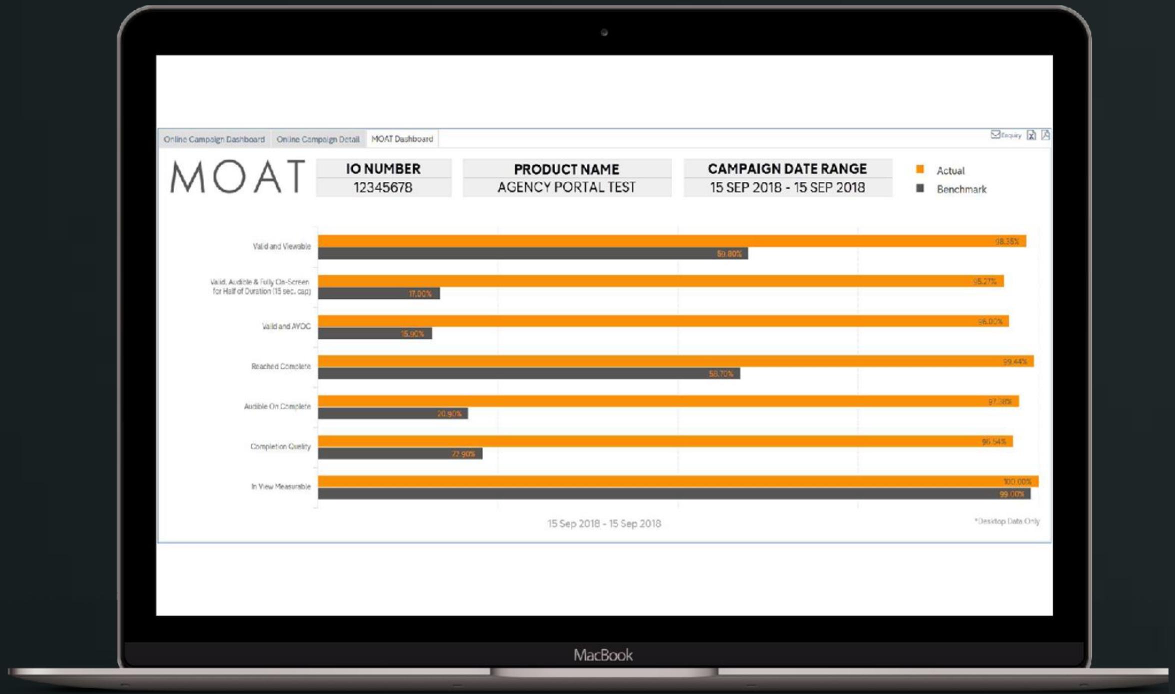
MOAT VIEWABILITY

METRICS OFFERING STATS ON:

- Viewable on screen
- Viewing completion
- Audible
- Viewed by a human

HIGHEST SCORES GLOBALLY

FIRST BROADCASTER TO MARKET



Brand Safety: No:1 MOAT Performer

MOAT

97.4%
Valid and Viewable Rate

97.4%
Completion Quality

95.1%
Valid and AVOC Rate

95.1%
Audible on Complete Rate

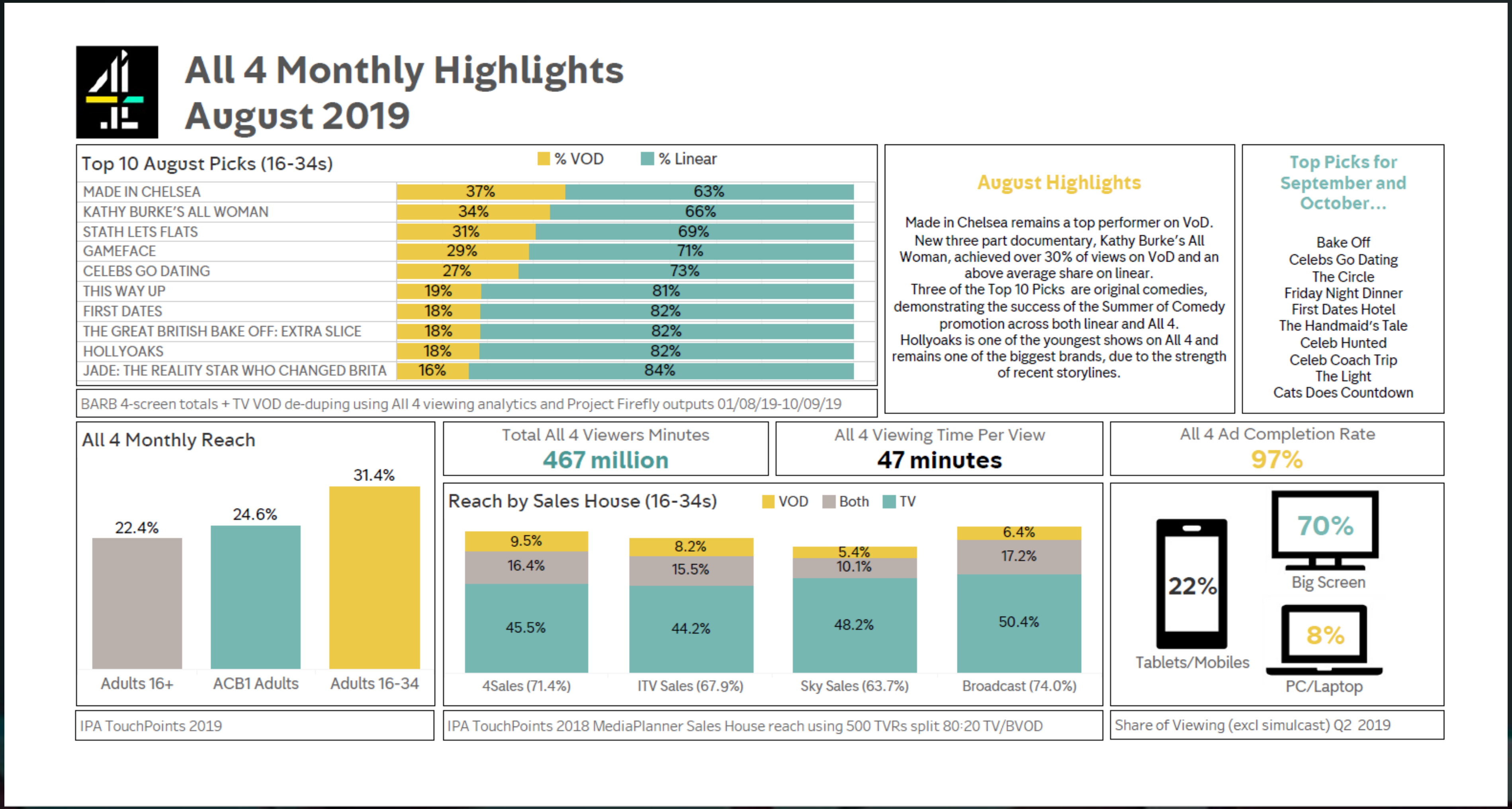
94.1%
Valid, Audible and Fully On-Screen for Half of Duration

100%
In-View Measurable Rate

98.3%
Reached Complete Rate

Average All 4 Moat performance, Jul 1st - Dec 16th 2019

Improved Digital Reporting



All 4 Monthly Highlights August 2019

Top 10 August Picks (16-34s) — % VOD / % Linear

	% VOD	% Linear
MADE IN CHELSEA	37%	63%
KATHY BURKE'S ALL WOMAN	34%	66%
STATH LETS FLATS	31%	69%
GAMEFACE	29%	71%
CELEBS GO DATING	27%	73%
THIS WAY UP	19%	81%
FIRST DATES	18%	82%
THE GREAT BRITISH BAKE OFF: EXTRA SLICE	18%	82%
HOLLYOAKS	18%	82%
JADE: THE REALITY STAR WHO CHANGED BRITA	16%	84%

BARB 4-screen totals + TV VOD de-duping using All 4 viewing analytics and Project Firefly outputs 01/08/19-10/09/19

August Highlights

Made in Chelsea remains a top performer on VoD.
New three part documentary, Kathy Burke's All Woman, achieved over 30% of views on VoD and an above average share on linear.
Three of the Top 10 Picks are original comedies, demonstrating the success of the Summer of Comedy promotion across both linear and All 4.
Hollyoaks is one of the youngest shows on All 4 and remains one of the biggest brands, due to the strength of recent storylines.

Top Picks for September and October…

Bake Off
Celebs Go Dating
The Circle
Friday Night Dinner
First Dates Hotel
The Handmaid's Tale
Celeb Hunted
Celeb Coach Trip
The Light
Cats Does Countdown

IPA TouchPoints 2019

Total All 4 Viewers Minutes
467 million

All 4 Viewing Time Per View
47 minutes

All 4 Ad Completion Rate
97%

IPA TouchPoints 2018 MediaPlanner Sales House reach using 500 TVRs split 80:20 TV/BVOD

Share of Viewing (excl simulcast) Q2 2019

BRANDM4TCH

RESULTS

mtm

6 Test partners
independently researched

OVERALL BRAND UPLIFTS

+180%

UPLIFT IN MTHLY ORDERS FROM BRANDMATCH SEGMENT OF LAPSED CUSTOMERS

+20%

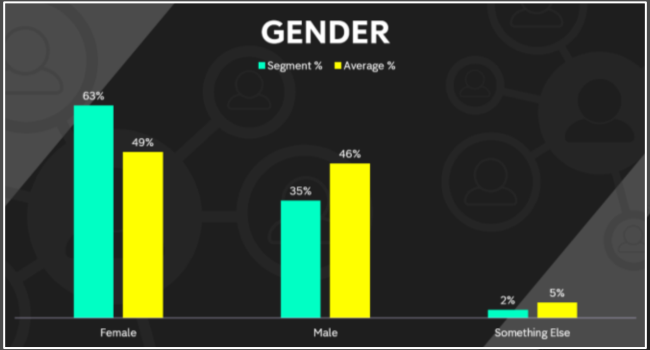
UPLIFT IN BRAND CONSIDERATION OF CUSTOMERS

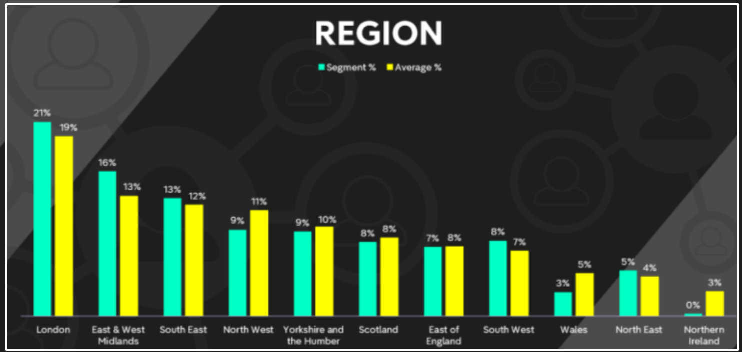
INDIVIDUAL BRAND UPLIFTS

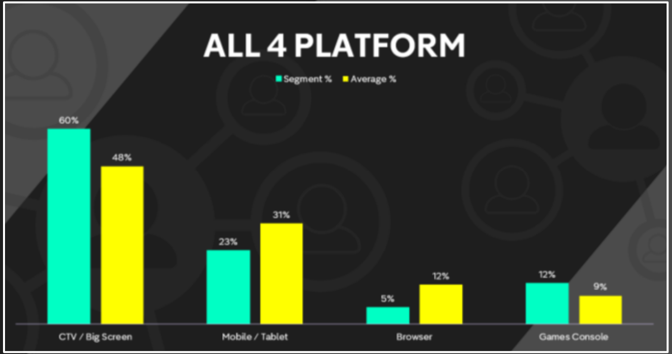
All Campaigns

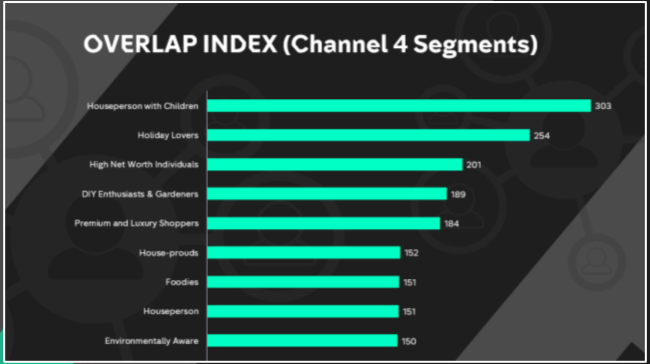
CUSTOMER PROFILE REPORT

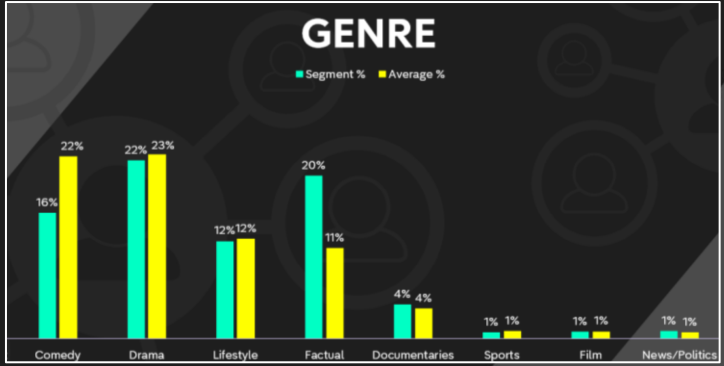
The BRANDM4TCH Audience Profile report allows us to report back on the way that a matched audience views All 4 content index vs the average All 4 user. This understanding can be used to inform future campaigns across All 4 and beyond.

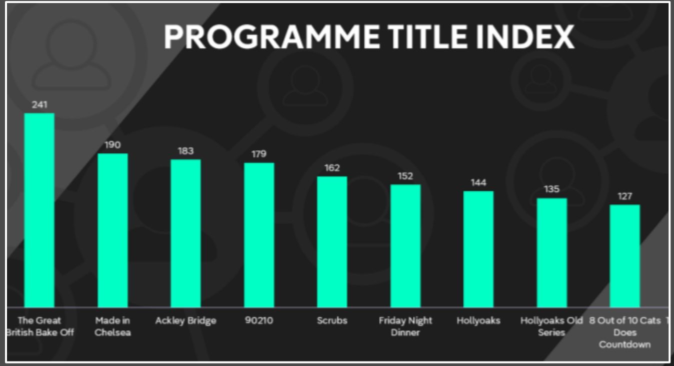










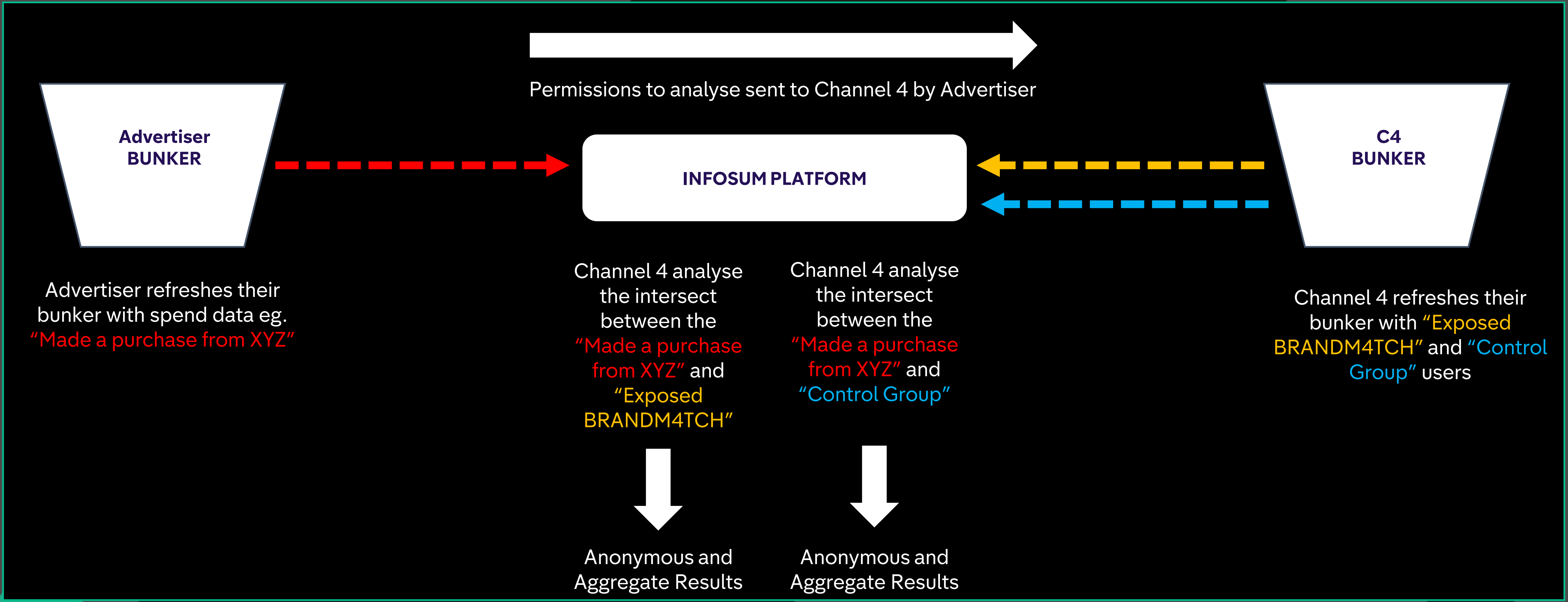


SALES

Suitable for Direct Response Campaigns

ATTRIBUTION STUDY

5% of BRANDM4TCH users will be randomly selected by C4 as a control group and will not be shown the BM campaign



PERSONALISATION WORKS

OPTIMUM UPLIFT BETWEEN AD LAB TEST SCORES FOR DYNAMIC AD VS. REGULAR AD

AD RECALL	RELEVANCY	TALKABILTY	BRAND POSITIVITY	CONSIDERATION
+17%	+83%	+175%	+41%	+50%
(PROMPTED)	(NET SCORE: 8-10)	(NET SCORE: 8-10)	(SCORE: VERY POSITIVE)	(PROMPTED 1ST CHOICE)

Source: BVA BDRC Dynamic TV ad tests (stage 1) across 5 dynamic ads, covering 5 different categories. N= 600 respondents

BVOD V'S
OTHER VIDEO

NOT ALL VOD IS THE SAME 1

What

A Research project demonstrating evidence that Broadcaster VoD is better than non-broadcaster VoD (YouTube) and justifies its premium positioning and price

Takeaways

#1 Advertising on broadcaster VoD has 3.5x greater attention levels than advertising on Youtube

#2 People are more receptive to advertising on broadcaster VoD because they view it in the same relaxed state that they view the content

#3 Viewers themselves perceive ALL4 as a quality VoD platform, and accept the ads as part of the experience

NOT ALL VOD IS THE SAME 2

What?

Phase 2 of project, we wanted to understand if anything had changed. We wanted to make the research more 'real world' by offering agencies a practical application of the results.

Takeaways

1) All 4 attracts higher attention levels compared to YouTube, with viewers being more involved with the content.

2) Adverts on All 4 are more likely to be viewed in full, in full screen mode and with sound.

3) Broadcaster VOD completed ads is 20% cheaper than YouTube and a third of the cost of Facebook.

Not all VoD is the same

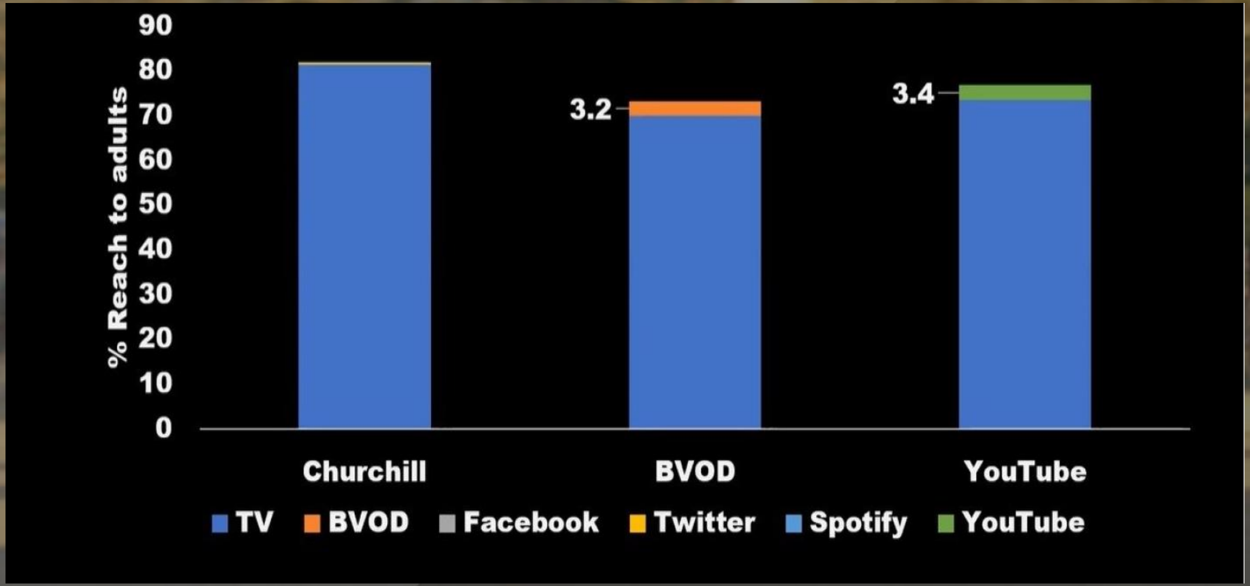
Research

Durham University

HEADLINE CPMS ARE NOT WHAT YOU WOULD THINK

	All 4	YouTube	Facebook
Completion Rate	96%	59%	17%
Watched (Not distracted)	85%	53%	53%
Add back in Organic views	1.7	1.0	1.0
True CPM	***£22***	***£28***	***£67***
Vs All 4	***Par***	***+27%***	***+300%***

DIRECT LINE CASE STUDY



HEADLINE STATS:

Incremental Reach
0.1% Facebook, Spotify and Twitter
3.2% for BVOD
3.4% Youtube

Price
BVOD 30% cheaper than TV
YouTube 40% cheaper than TV
Facebook 14 times more expensive!!

BROADCASTER VOD

Premium Entertainment