Kelvin Storie

Principal: Media Strategy & Insights

Putting

More Power

In the viewers' hands

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The Accelerated Change

Most TV is still watched at scheduled times, and advertising is purchased accordingly, but more and more viewers are tuning to Broadcaster Video on Demand (BVOD).

What was something that was constricted to ones home has now expanded, the growing experience of viewers becoming more one-on-one with the viewing platform - people are watching on a mobile device, on a tablet, whilst commuting, etc.

Layering Your Video Plan

Linear TV (Live) is where the majority of TV investment goes in terms of advertising, however BVOD is a fast-growing, new area and is becoming more and more important to layered ones TV (Video) strategy to access the maximum amount of Reach.

What is Catch Up? (BVOD)

DStv Catch Up gives customers the ability to "catch up" on a selection of content ranging from series to movies, kids' shows, documentaries, and selected sporting highlights.

This gives the viewer the choice to access content when they want and how they want.

DStv Catch Up

Local Content – 7 days

International Content – 28 days.

Where do I access Catch Up

Set Top Box
Explora / PVR

DStv Catch Up

Set Top Box
Connected Explora
(utilizing the internet)

DStv Catch Up Plus

DStv Now
Streaming Service
(App/Web/Leanback)

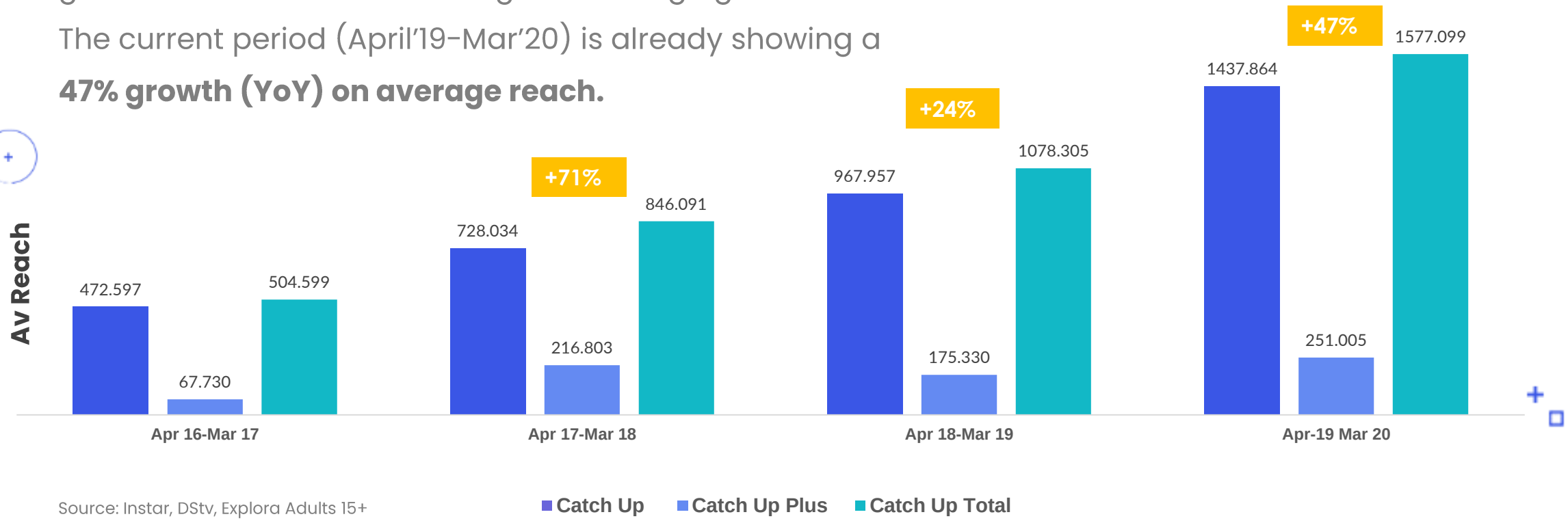
DStv Now Catch Up

Non-Linear World

Digital Streaming World

Viewership Trend - Total STB Catch Up

Within the South African market, Catch Up services have gained momentum with strong double-digit growth YoY. The current period (April'19-Mar'20) is already showing a **47% growth (YoY) on average reach.**



Source: Instar, DStv, Explora Adults 15+

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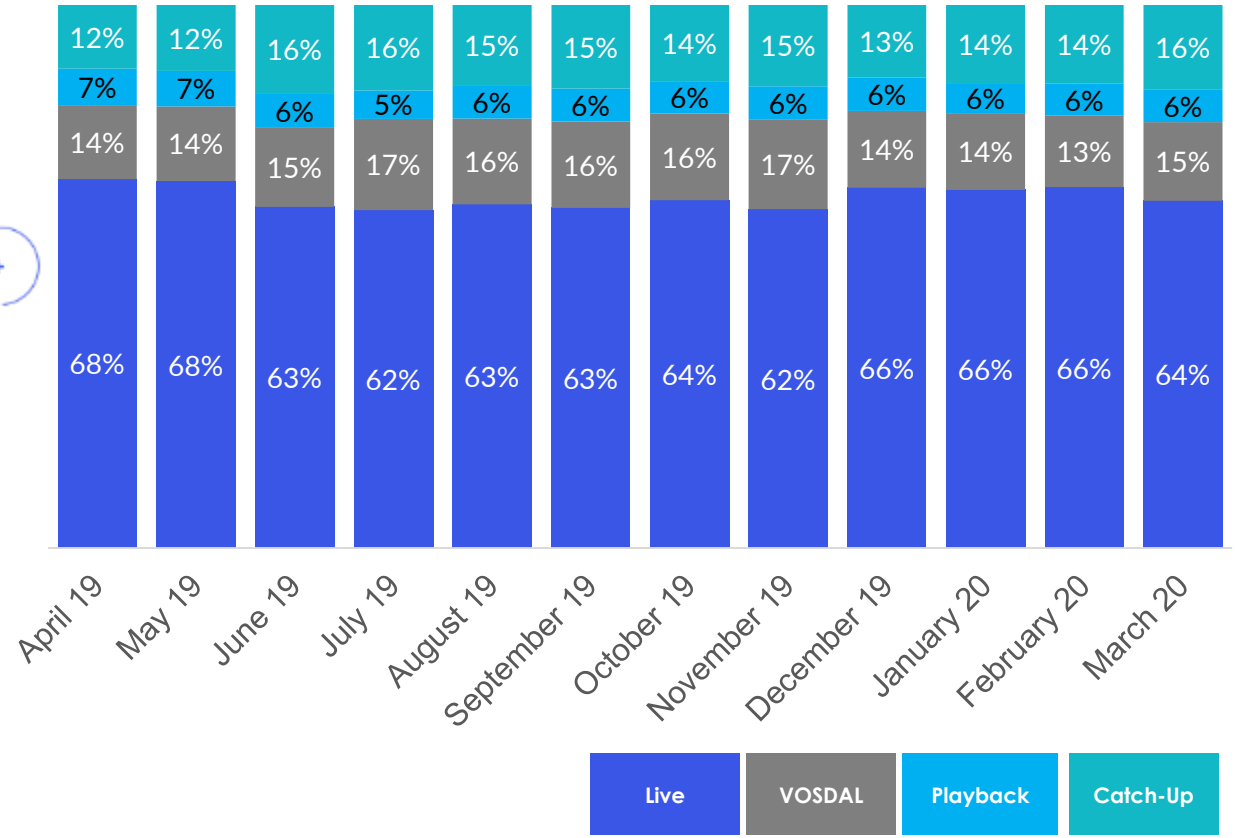
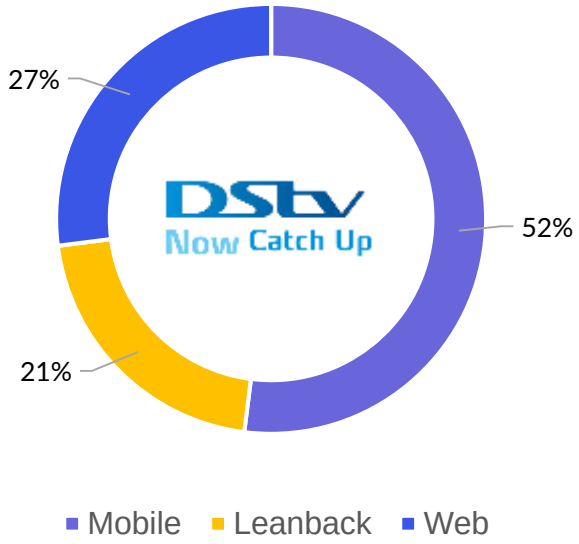
Total DMS Viewership Activities Breakdown

Total PVR/Explora Units



Source: Instar DStv-I, Total Viewing Panel, April 2019 – March 2020, Dayparts by activity 0-7 days, M-S 17:00-23:00, Explora Adults 15+, Audience in 000s

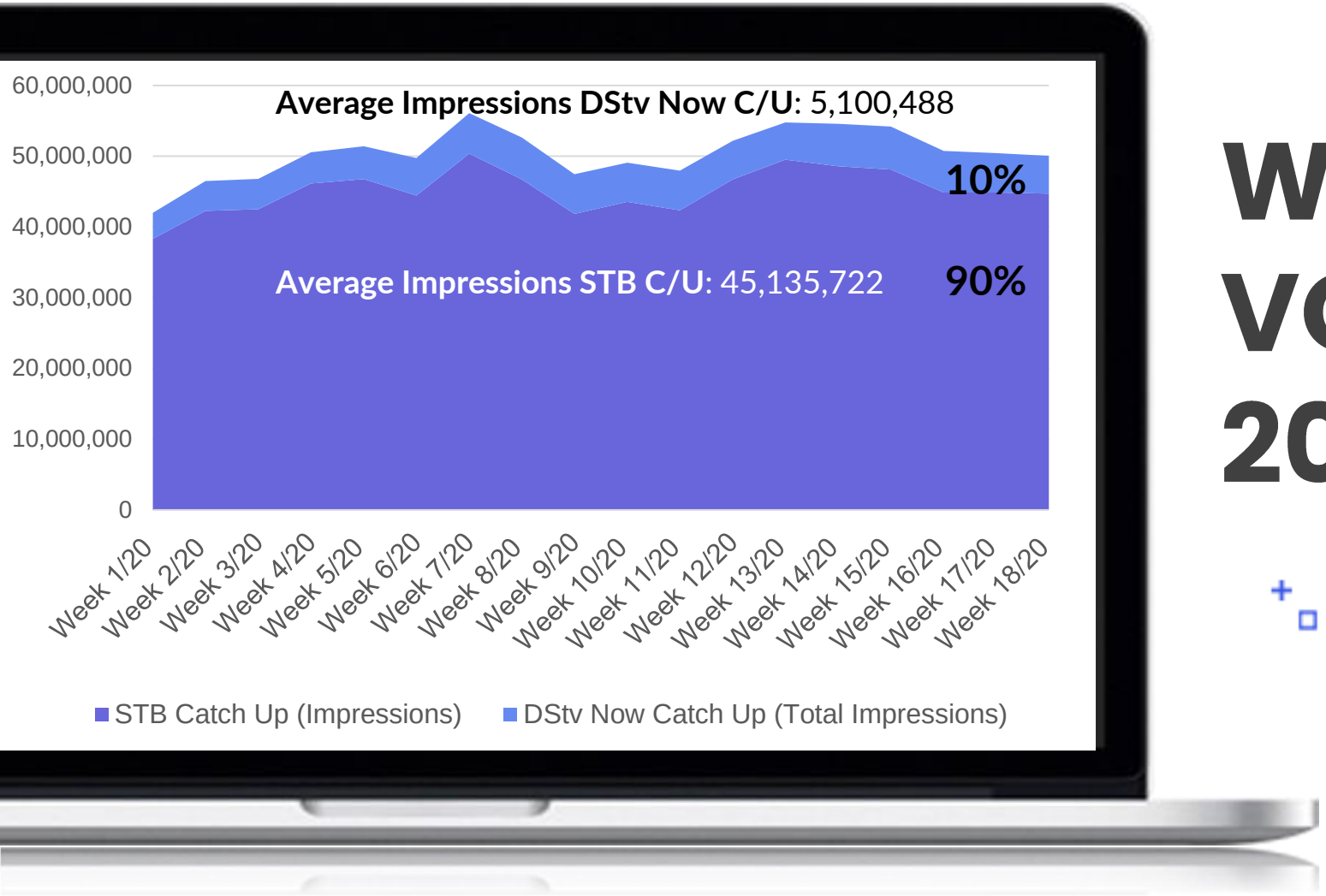
Event Totals



*Leanback – Smart TV, Xbox, Apple & Android Box

52% of Catch up Viewership is streamed via Mobile Device, followed by Web at 27%.

DStv Media Sales



Week on Week VOD Access – 2020

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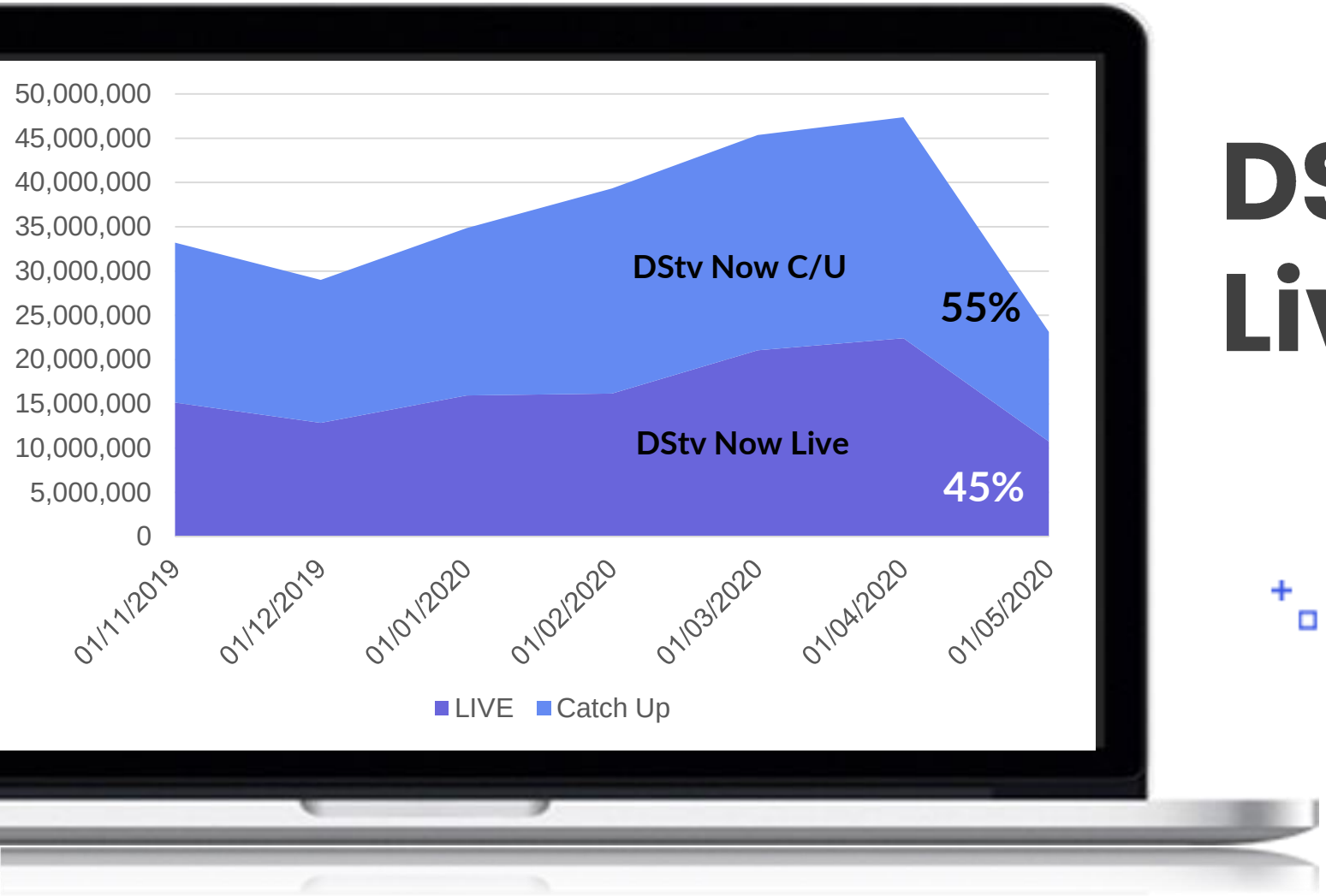

DStv Now Live vs Catch Up

Data up till 18th May 2020

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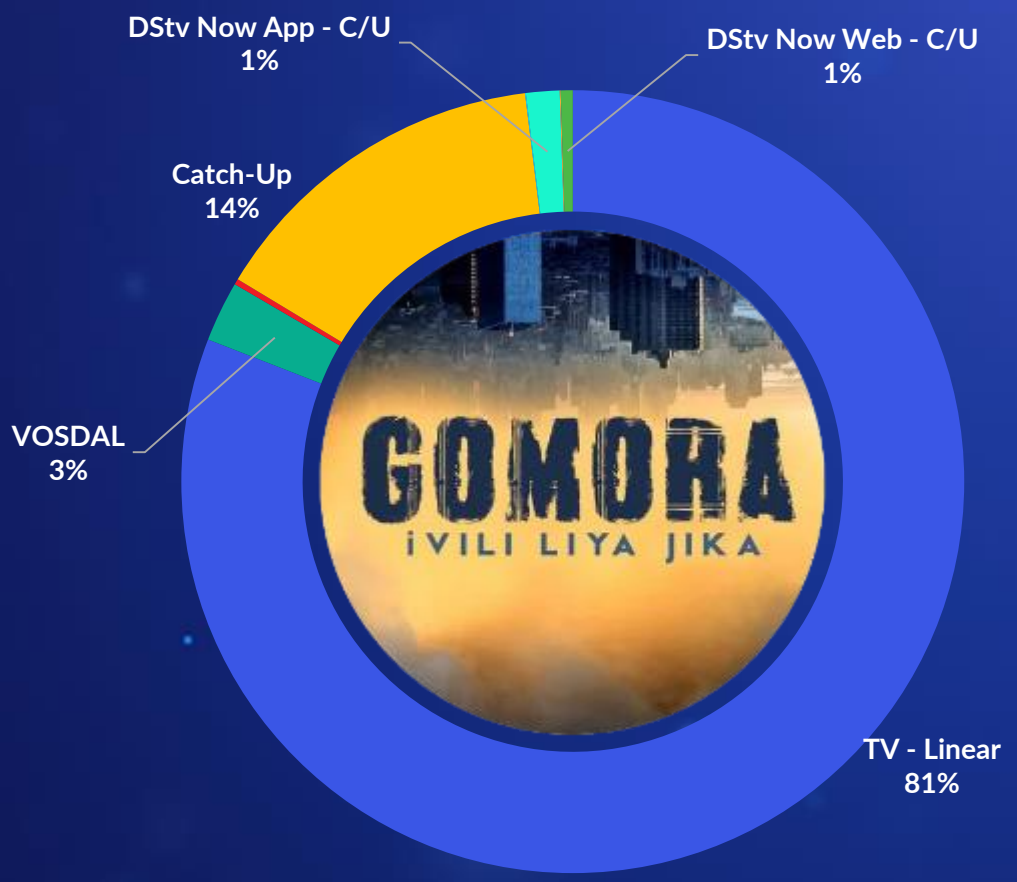
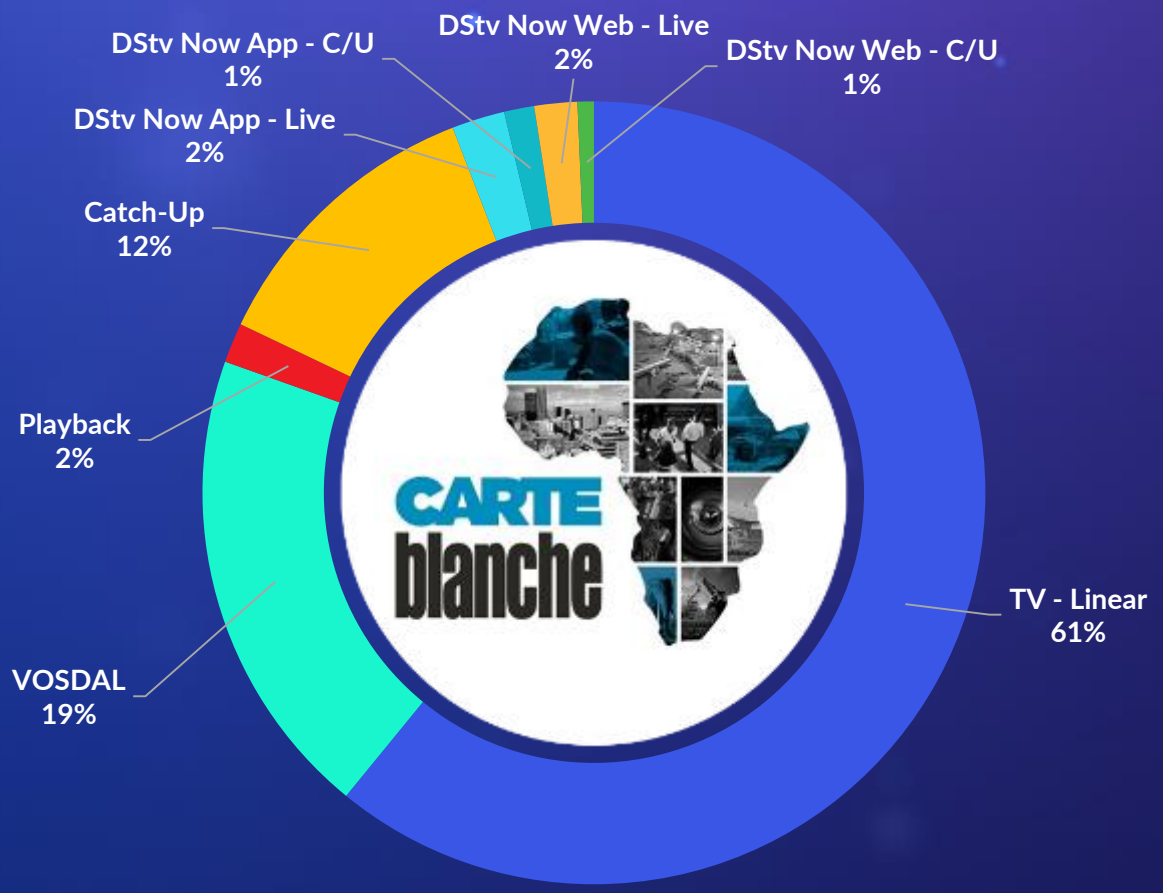
Stacking Your Video Buy





30 March – 6 April 2020

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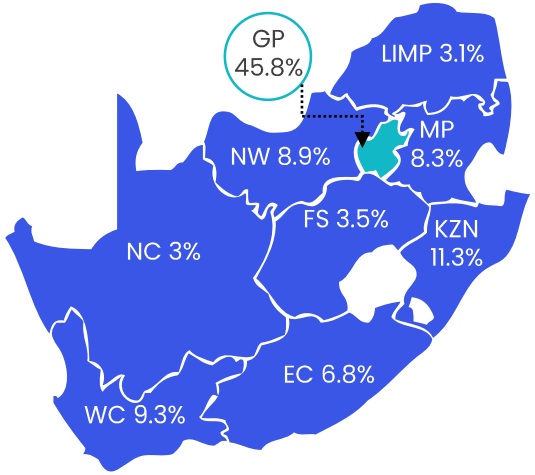
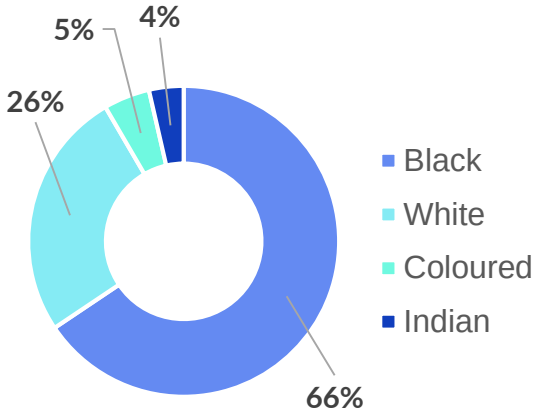
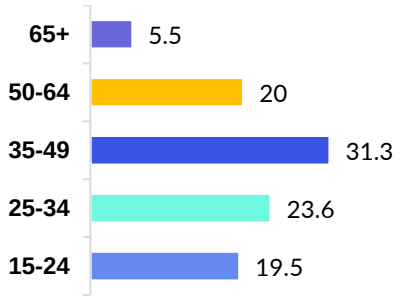
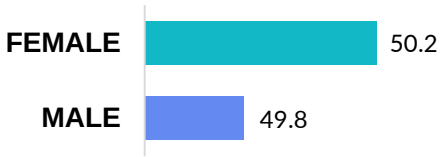
DStv Media Sales

Profile of the Catch Up Viewer – STB





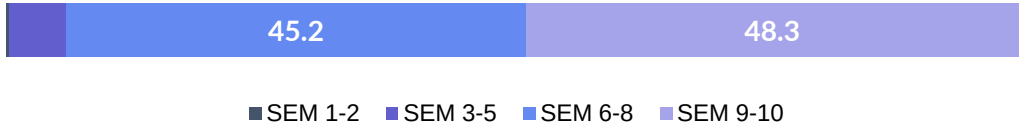




Monthly Household Income

R1-R13,999	R14,000 - R34,999	R35,000+
13.7	33.3	38.9

Socio-economic Measurement



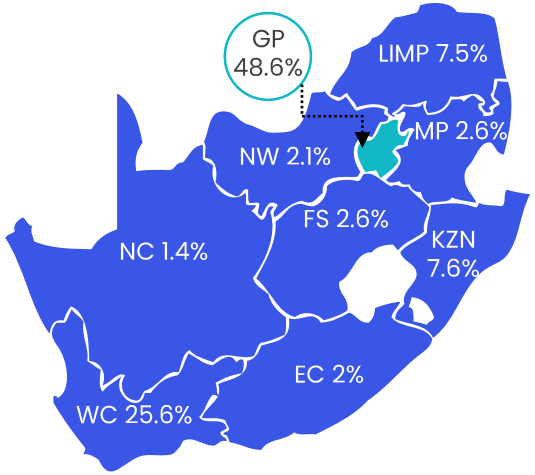
Work Status

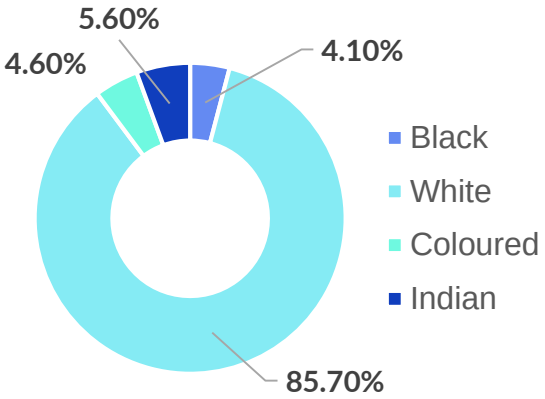
FULL TIME	PART TIME	SELF-EMPLOYED
50.5	8.2	1.3
HOUSEWIFE	**STUDENT**	**RETIRED**
4	16.8	6.6

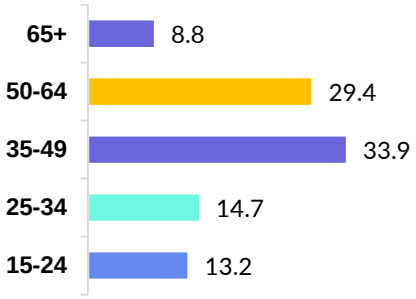
Source: Instar DStv-I | Explora Adults 15+ | Total Catch-Up Push Assets |March 2020 |

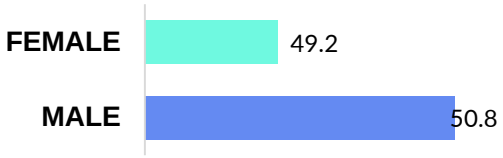
DStv Media Sales

Profile of the Catch Up Viewer – STB Plus





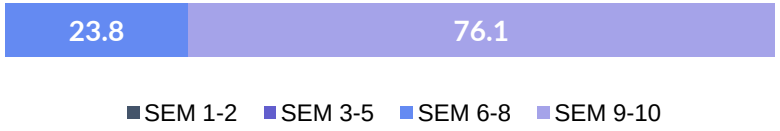




Monthly Household Income

R1-R13,999	R14,000 - R34,999	R35,000+
0.7	7.3	73.3

Socio-economic Measurement



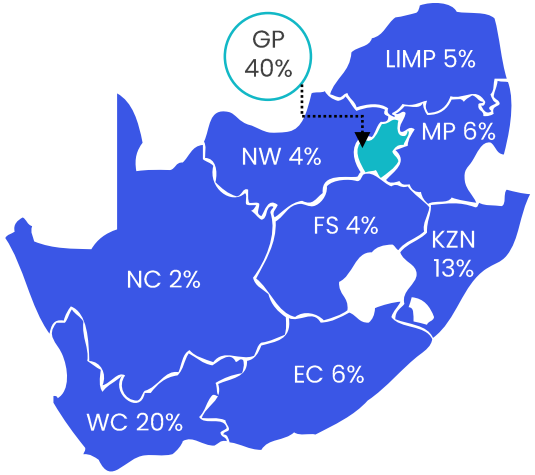
Work Status

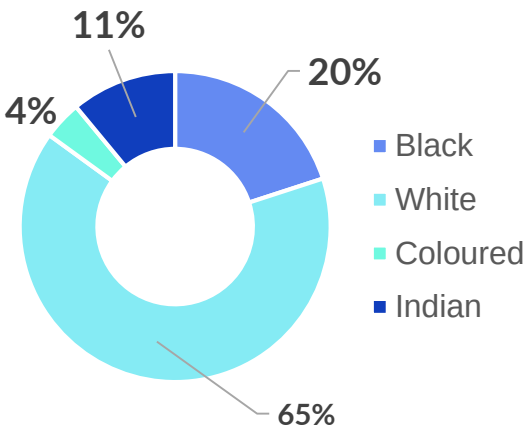
FULL TIME	PART TIME	SELF-EMPLOYED
64.9	7.6	4.2
HOUSEWIFE	**STUDENT**	**RETIRED**
4.9	10.7	5.1

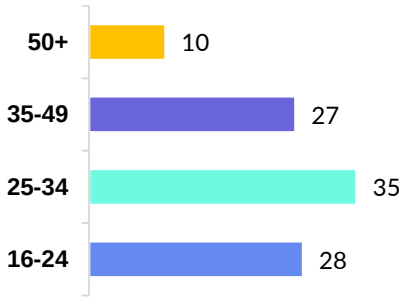
Source: Instar DStv-I | Explora Adults 15+ | Total Catch-Up Pull Assets | March 2020|

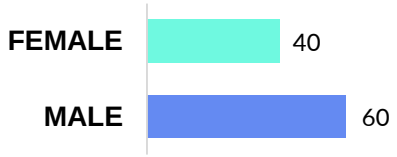
DStv Media Sales

Profile of the DStv Now Viewer









Monthly Household Income

R1-R19,999	R20,000 – R39,999	R40,000+
39%	20%	41%

Personality Traits

- Modern
- Family-Minded
- Charming
- Sociable
- Confident
- Successful

Source: Brand Atlas 2019 Wave 1

DStv Media Sales

Top DMS Shows by Viewing Activity

March 2020

Set Top Box

Top 5 Catch Up Shows

1	MZANSI MAGIC	512K Ave Viewers
2	MZANSI MAGIC	458K Ave Viewers
3	MZANSI MAGIC	448K Ave Viewers
4	MZANSI MAGIC	415K Ave Viewers
5	M-NET	340K Ave Viewers

DStv Now

Top 5 DStv Now Shows

1		88K Ave Viewers
2		83K Ave Viewers
3		63K Ave Viewers
4		62K Ave Viewers
5		60K Ave Viewers

April 2020

Set Top Box

Top 5 Catch Up Shows

1	MZANSI MAGIC	526K Ave Viewers
2	MZANSI MAGIC	478K Ave Viewers
3	MZANSI MAGIC	396K Ave Viewers
4	MZANSI MAGIC	370K Ave Viewers
5	MZANSI MAGIC	364K Ave Viewers

DStv Now

Top 5 DStv Now Shows

1		98K Ave Viewers
2		92K Ave Viewers
3		80K Ave Viewers
4		77K Ave Viewers
5		69K Ave Viewers

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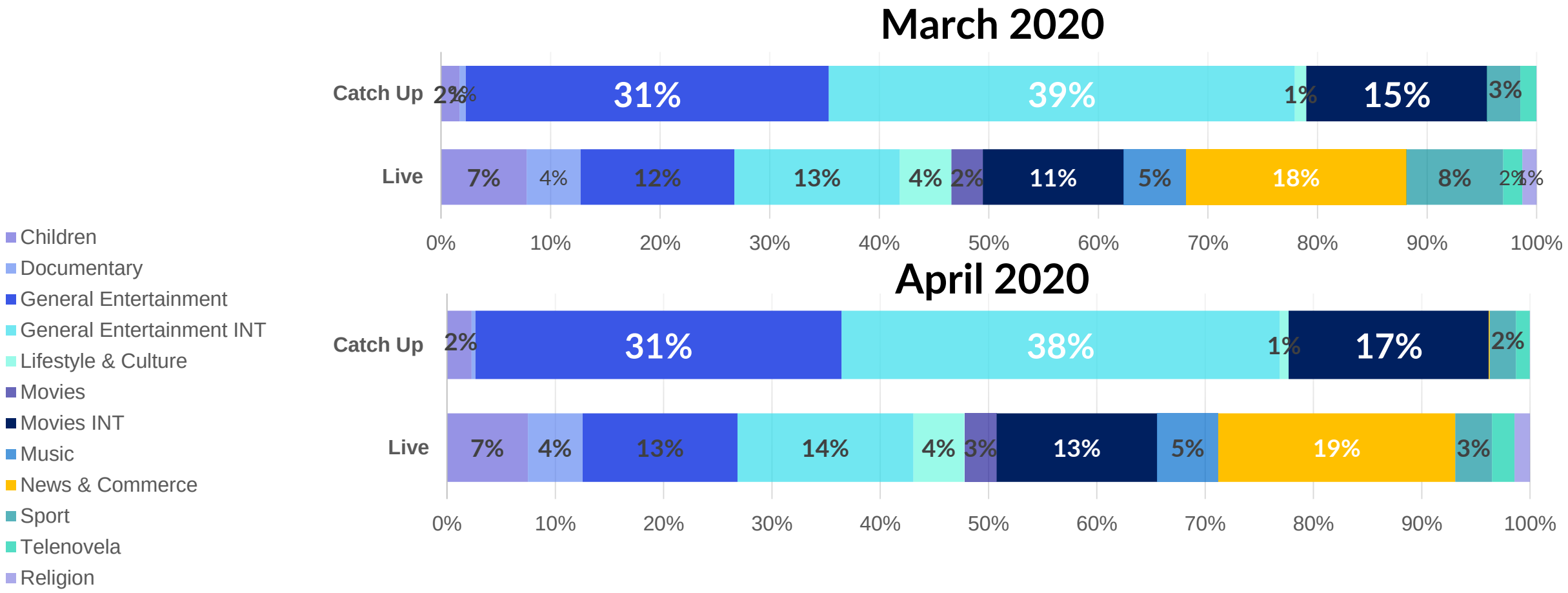
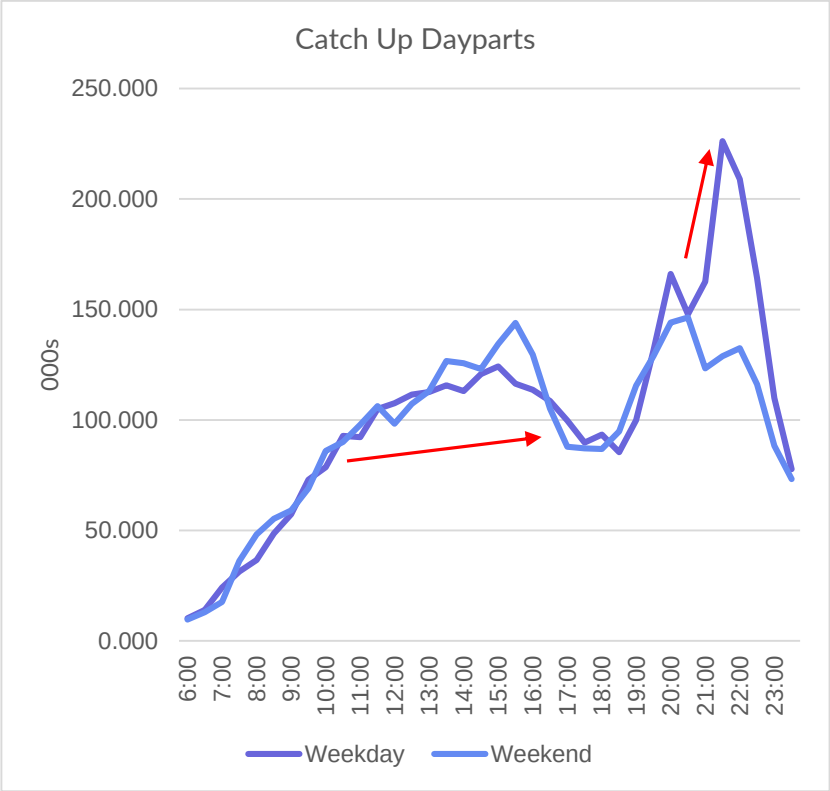
DStv Media Sales

Genre Split


March 2020
Catch Up
2%
1%
31%
39%
1%
15%
3%
Live
7%
4%
12%
13%
4%
2%
11%
5%
18%
8%
2%
1%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
April 2020
Catch Up
2%
31%
38%
1%
17%
2%
Live
7%
4%
13%
14%
4%
3%
13%
5%
19%
3%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Children
Documentary
General Entertainment
General Entertainment INT
Lifestyle & Culture
Movies
Movies INT
Music
News & Commerce
Sport
Telenovela
Religion

Catch Up Genre Clusters

Packages based on top most popular genres on Catch Up.



Local	TVR
1 The Queen	5.85
2 Isibaya	5.24
3 Gomora	5.09
4 Uyajola 9/9	4.03
5 Lockdown	3.99
6 Mnakwethu	3.93
7 Kwa Mam'mkhize	3.20
8 The River	2.99
9 Madam & Mercy	2.65
10 Papa Penny Ahee	2.45

Movies	TVR
1 The Hurricane Heist	1.36
2 Braven	1.24
3 Little	1.22
4 Beyond The Edge	1.09
5 Tyler Perry's Acrimony	1.01
6 Uncle Drew	0.91
7 Men In Black: International	0.88
8 Direct Action	0.86
9 Solomon Kane	0.82
10 Beneath Us	0.81

Series	TVR
1 Chicago PD	2.21
2 Young Sheldon	1.77
3 American Housewife	1.73
4 MasterChef Australia	1.72
5 Grey's Anatomy	1.67
6 9-1-1	1.64
7 Chicago Fire	1.59
8 Station 19	1.43
9 The Resident	1.29
10 Little Fires Everywhere	1.24

Sport	TVR
1 WWE SmackDown LIVE	0.56
2 WrestleMania 36	0.51
3 Seth Rollins	0.40
4 WWE Raw	0.38
5 A Nations Story	0.38
6 Wizards of Oz	0.37
7 UEFA Champions League	0.36
8 Orlando Pirates Legacy Chapters	0.36
9 Football's Greatest Club Teams	0.34
10 Premier League Classic Matches	0.33

Source: Instar DStv-I Total Viewing Panel |**April 2020**| Programmes Report| M- S 06:00-24:00, Explora Adults 15+

DStv Media Sales

Distinct segments amongst DStv Catch Up Viewers

Moving away from spot by spot purchasing to genre clustering on Catch Up enables us to focus on 4 key segments

Series Lovers

Series Seekers

Local Indulgers

Movie Fans

Movie Generalist

Factual & Sports

Sport Enthusiasts

Local Content: 7 days
International Content: 28 days

DStv Media Sales

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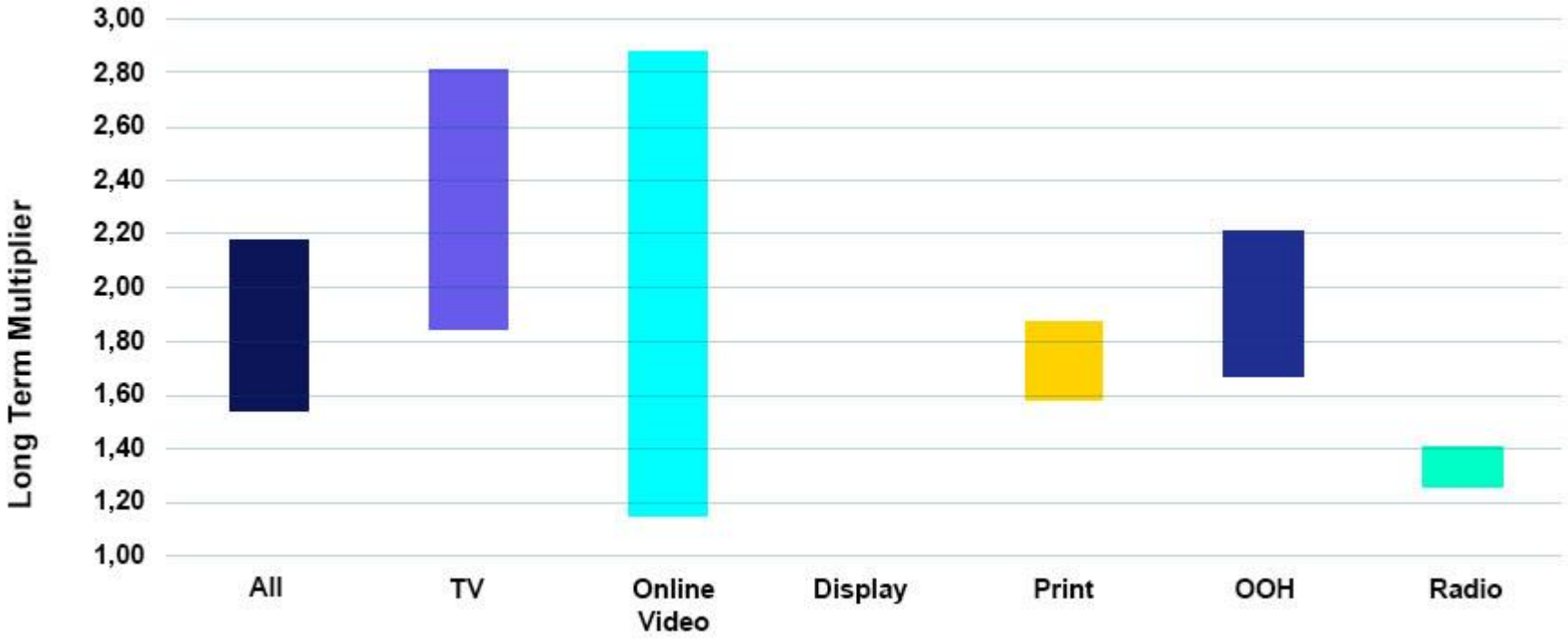
In Summary, what is video?



Online Video includes Broadcaster VOD, Youtube, Facebook video & online programmatic video

Source: FutureofTVGlobal2019

DSTV Media Sales

Thank You
End Section 1

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