

# FAST and SVOD ad tiers



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# Consumers have never had it better

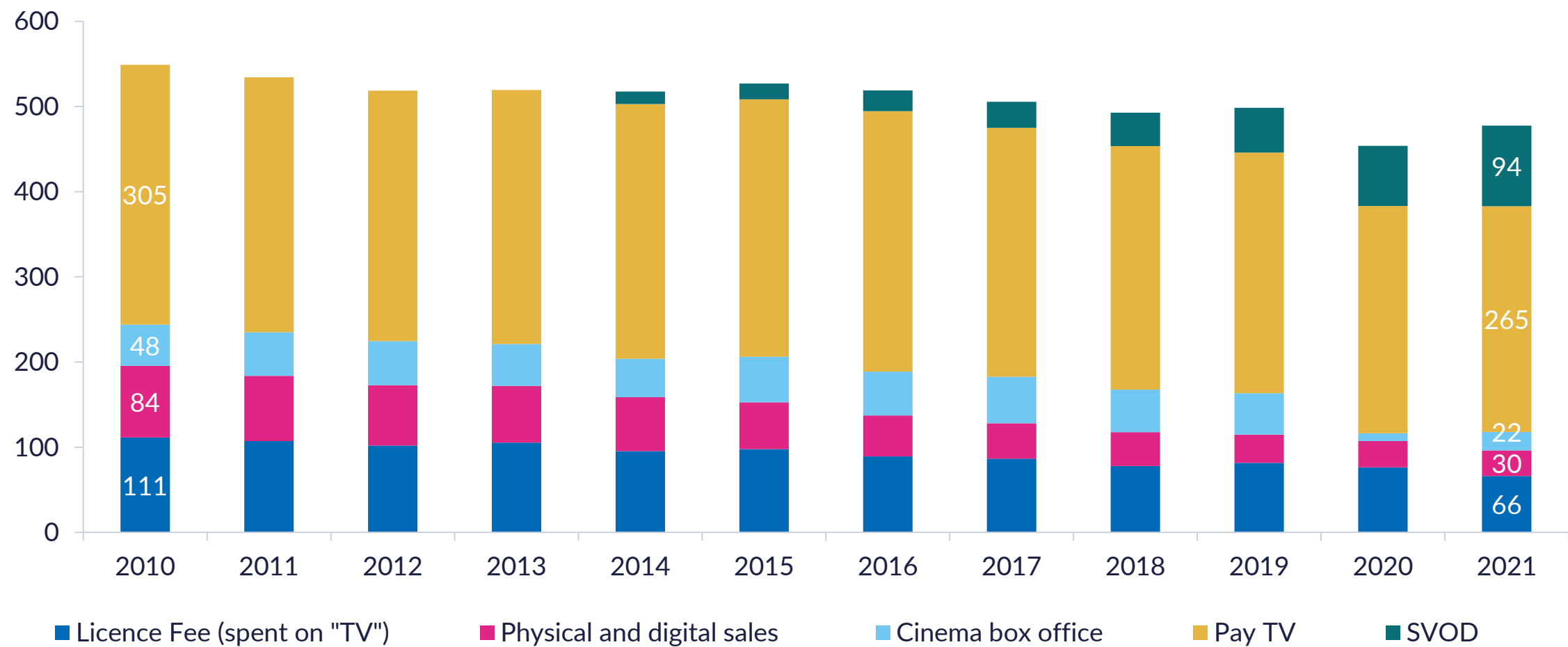
UK consumers have:

- Lowering discretionary expenditure on long-form video
- Rapidly increasing volumes of content accessible by the average household, despite that lower spend

This is balanced by:

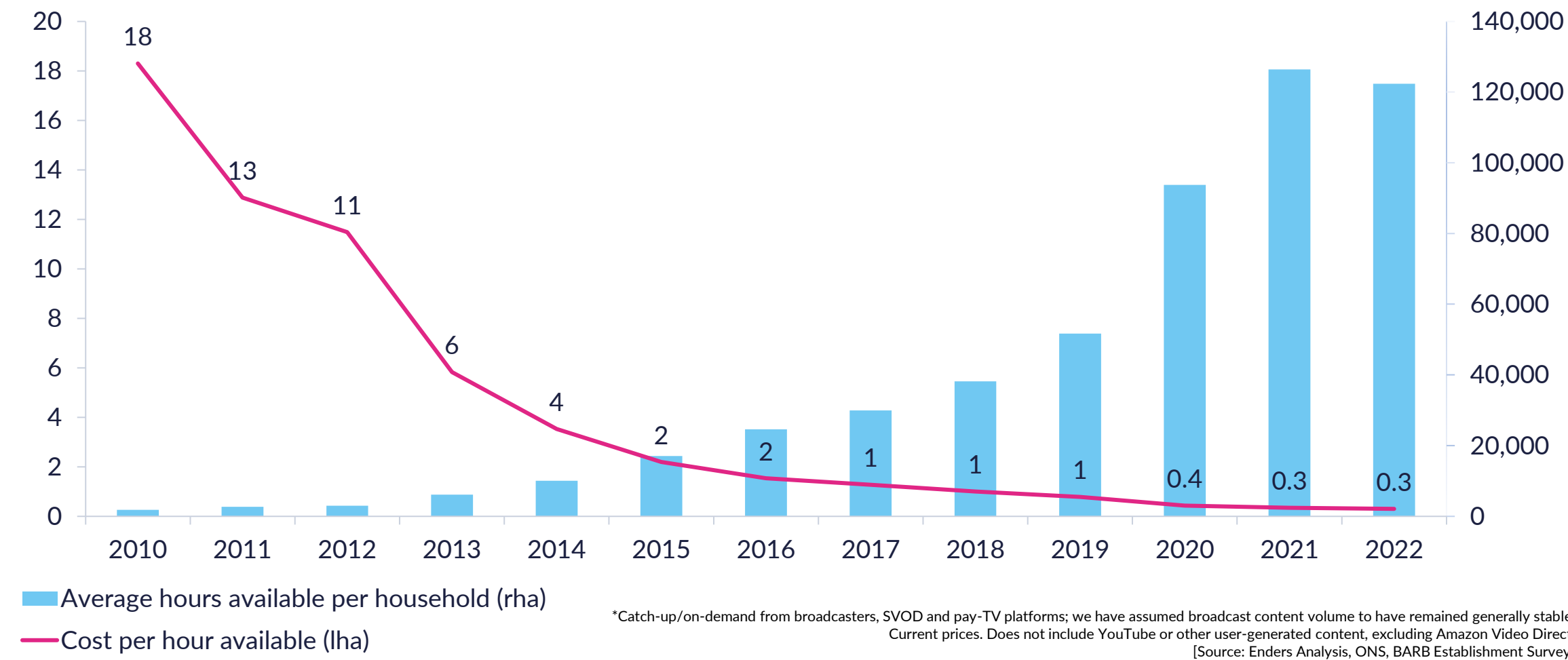
- Declining viewing of long-form content

## Average annual UK household direct video spend, 2022 prices (£)

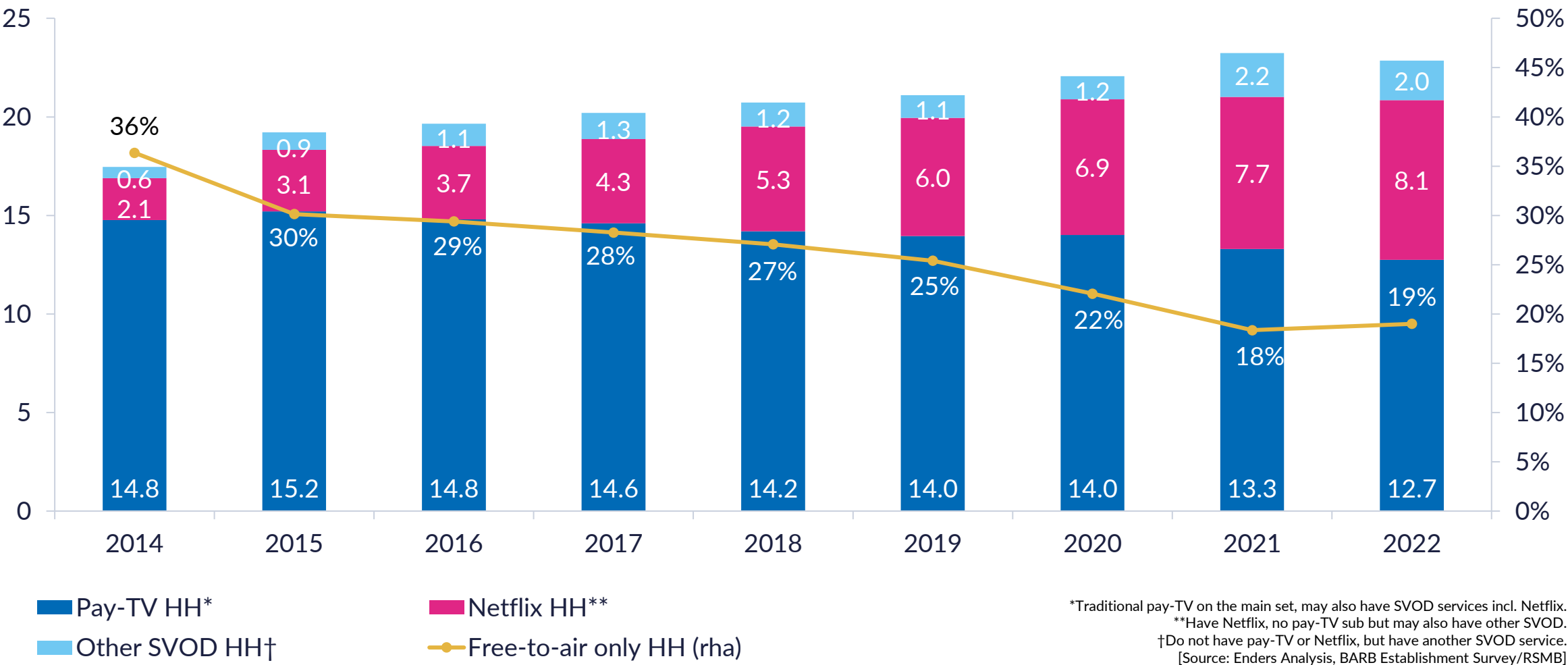


[Source: Enders Analysis, BBC, ERA, BFI, BARB Establishment Survey, OECD]

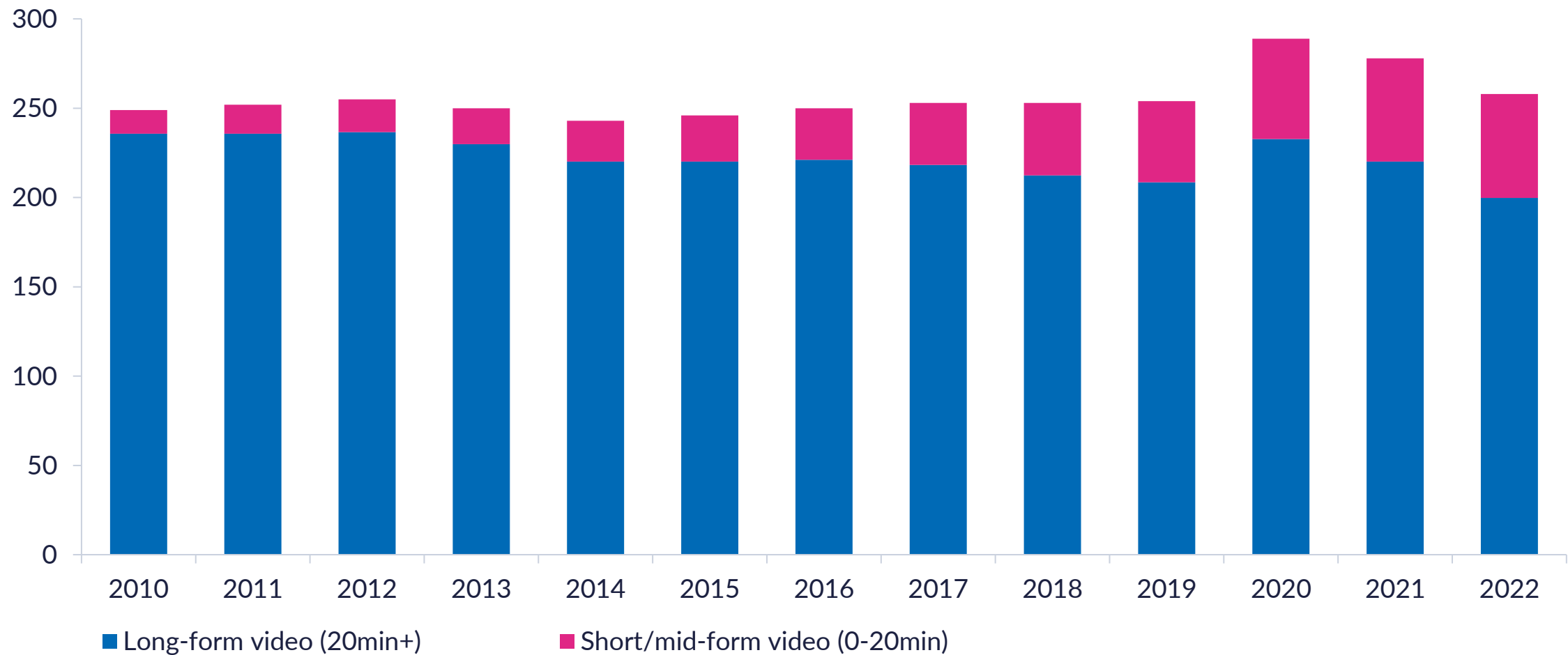
Average amount of long-form video content available\* (hours) and cost per hour available (pence), UK households



UK households paying for TV, 2014-2021 (m)

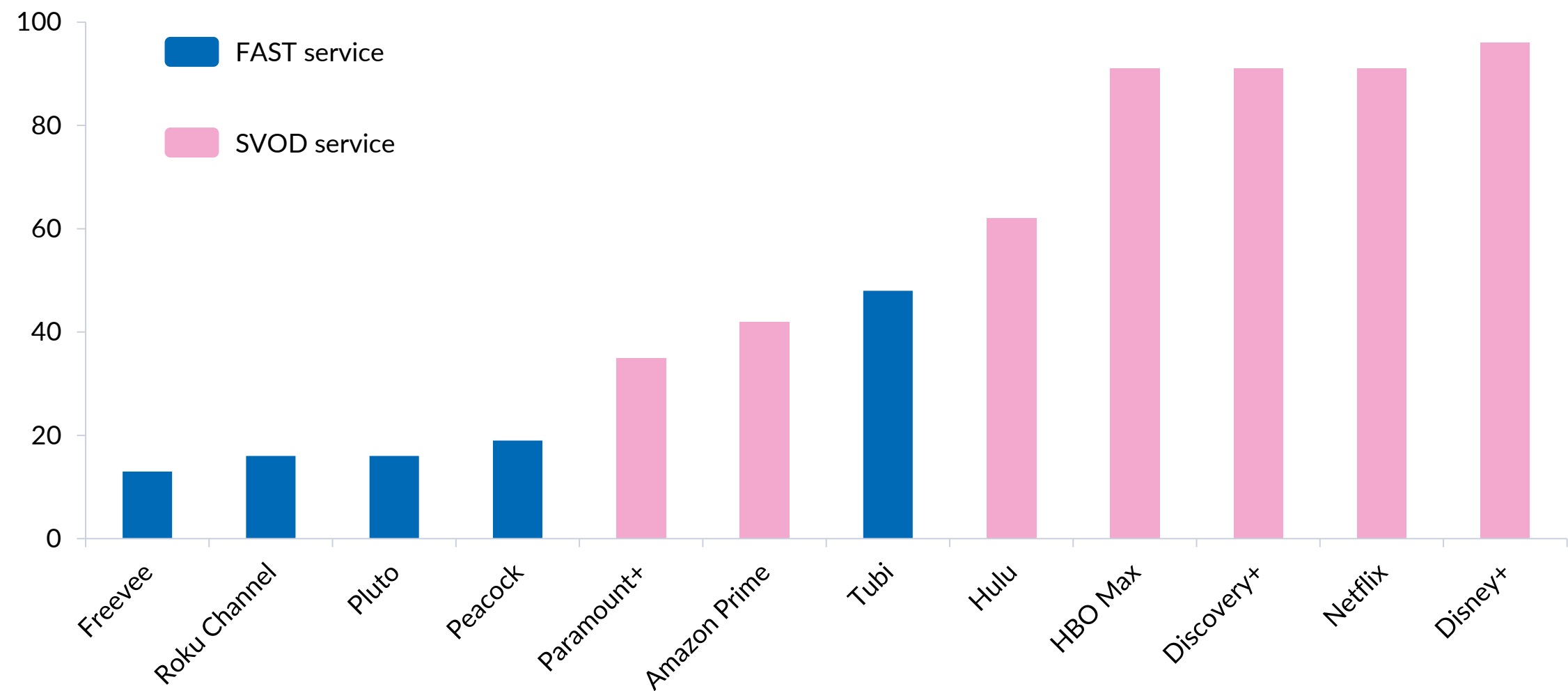


## Breakdown of video viewing, UK individuals 4+ (mins/person/day)



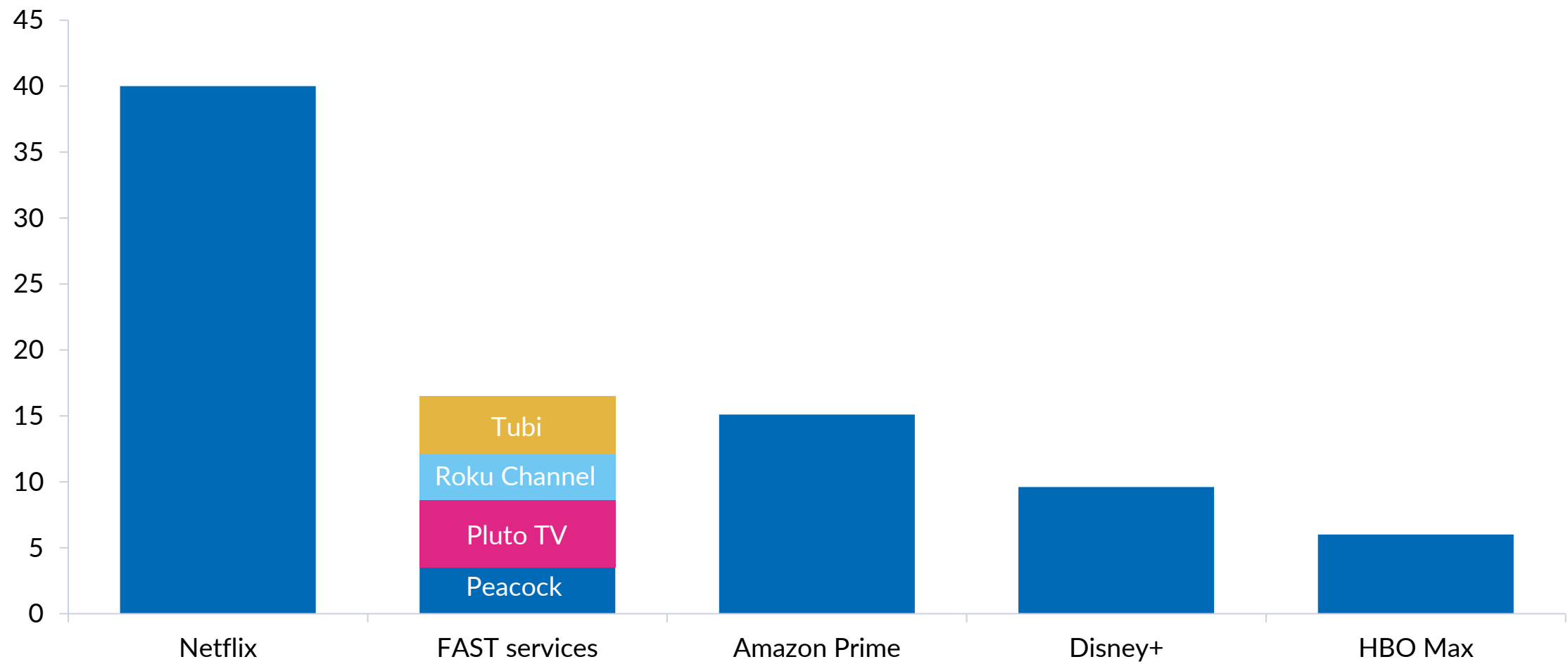
Excludes non-monetisable social video and online adult content.  
[Source: Enders Analysis based on BARB Establishment Survey/RSMB, BARB/AdvantEdge, Comscore, ONS, industry research]

## Exclusive content as a proportion of library, US, August 2022



Note: Peacock has a premium, paid-for tier.  
[Source: Justwatch.com, Barclays Research]

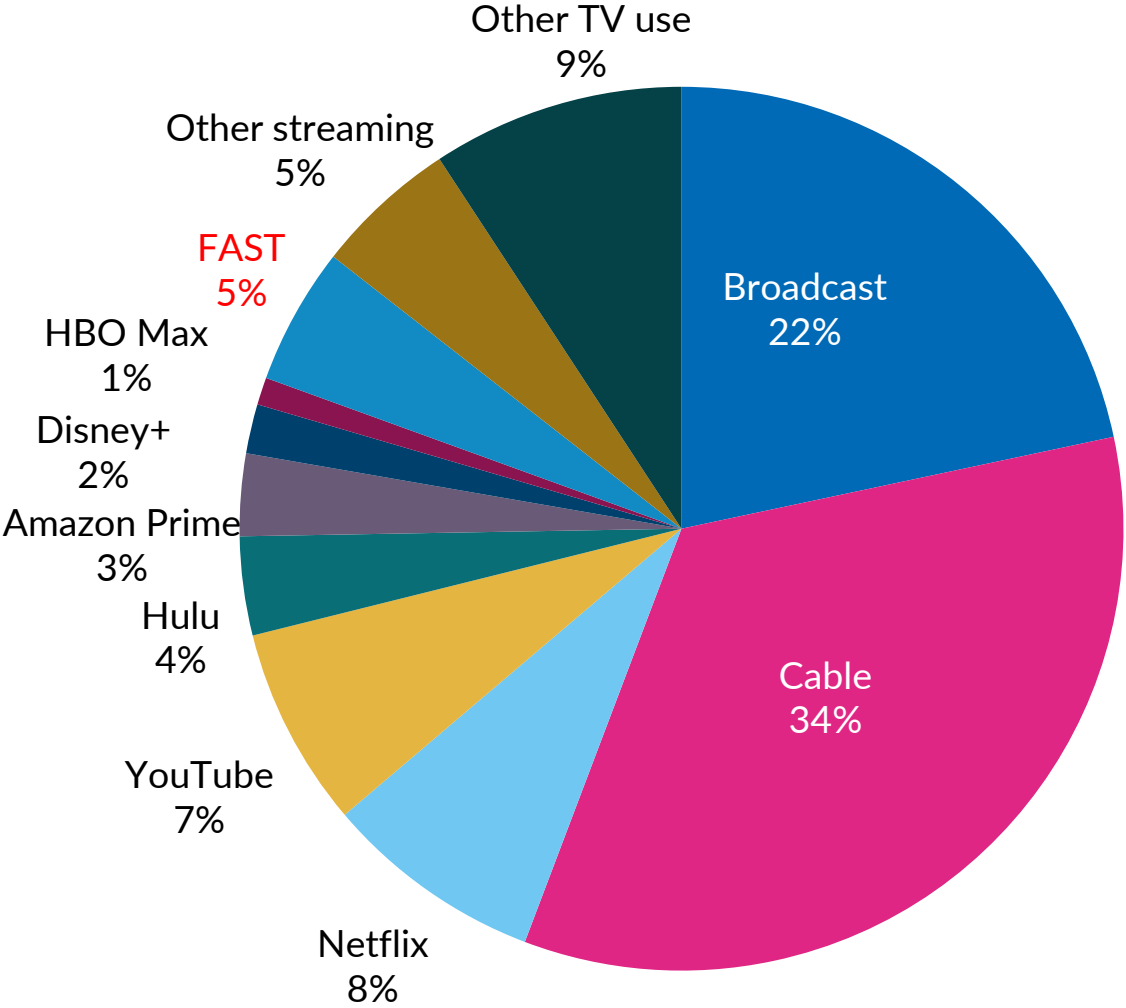
US weekly video viewing by streaming service, August 2022 (bn, min)



[Source: Nielsen, Barclays Research, Enders Analysis]

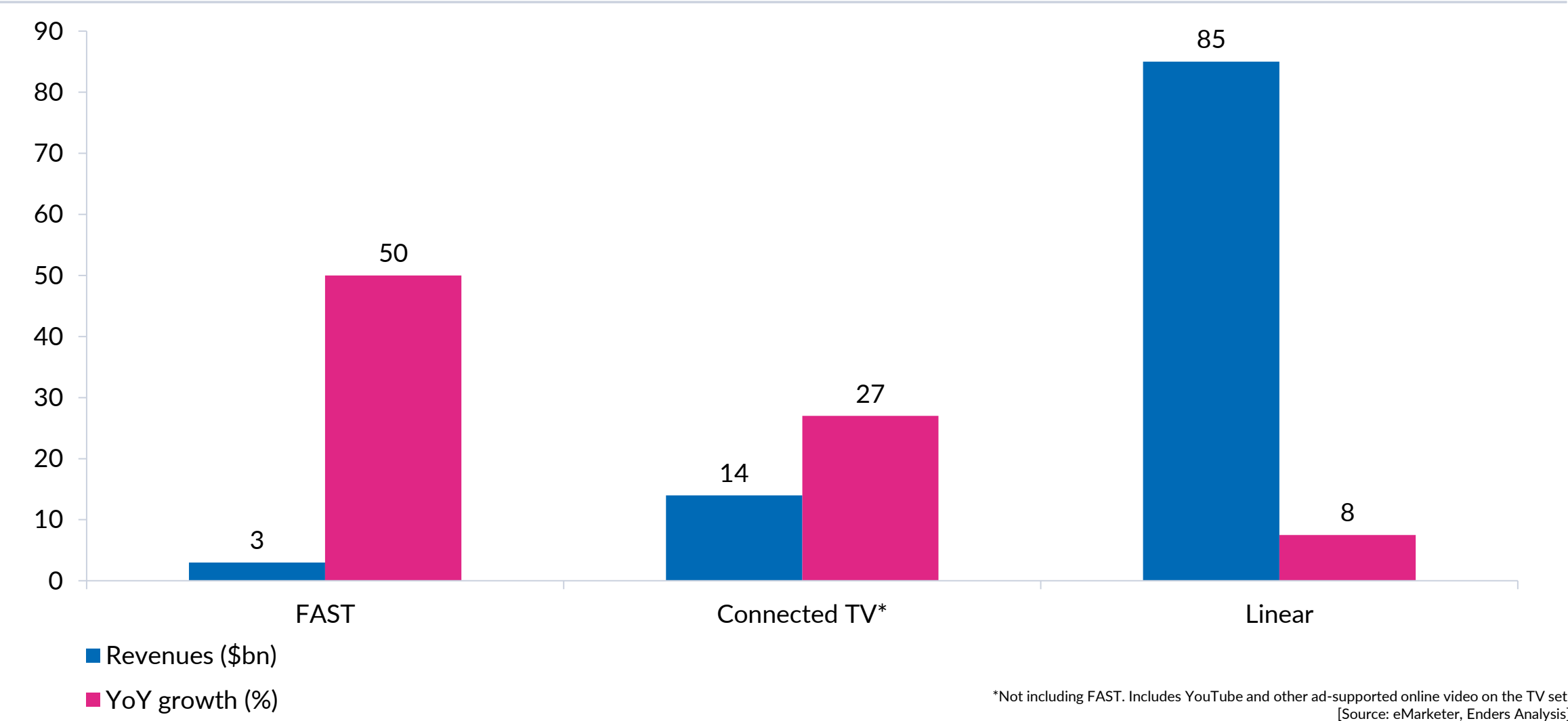


US total TV viewing, August 2022

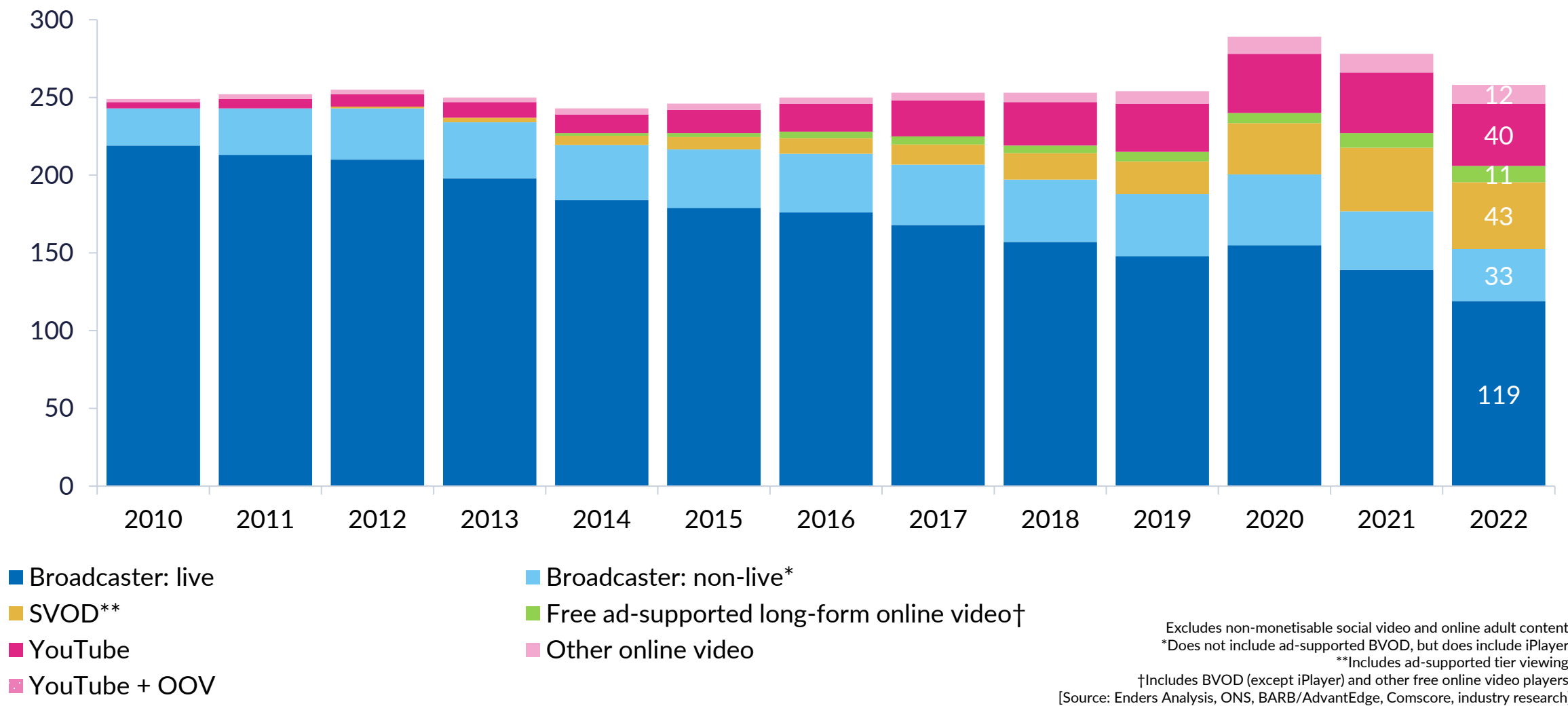


[Source: Nielsen, Enders Analysis]

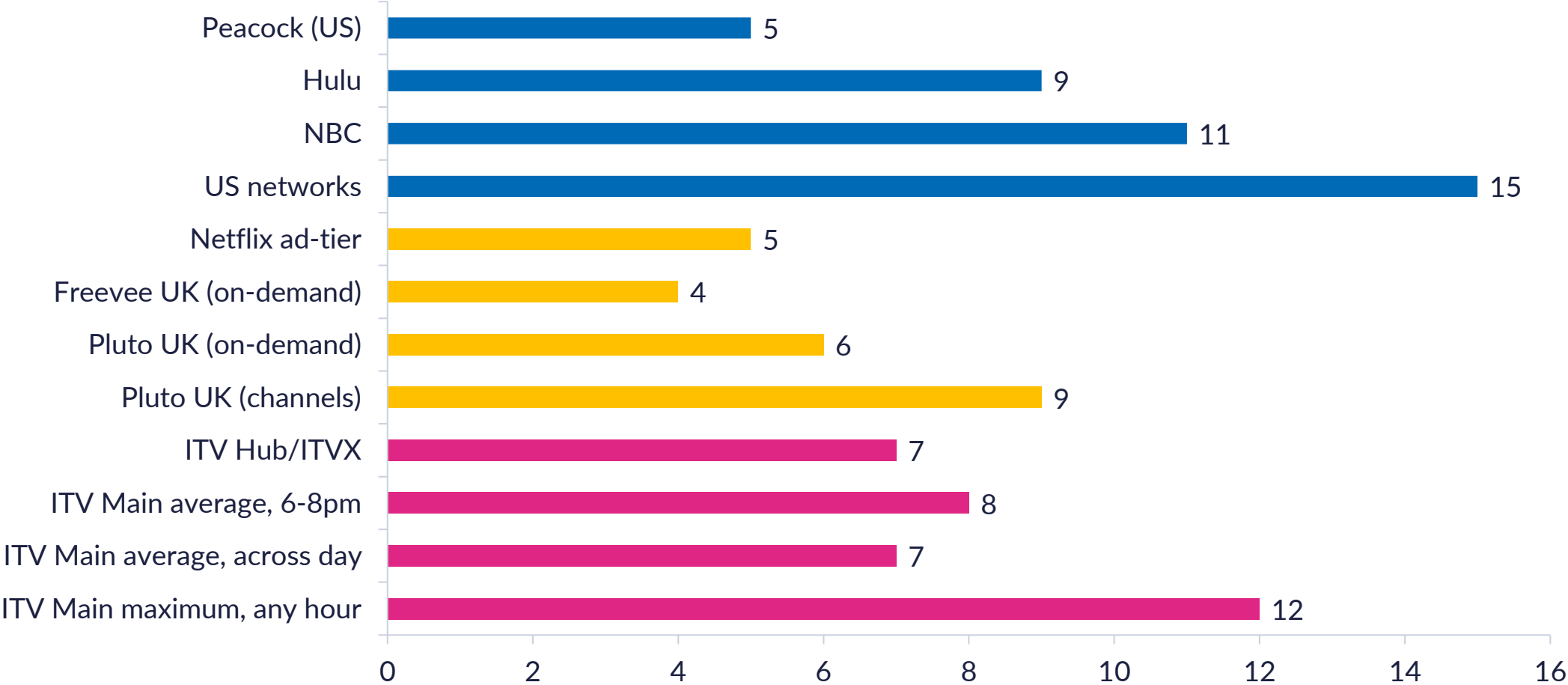
# US advertising revenues, 2022



## Breakdown of total video viewing, UK individuals 4+ (mins/person/day)

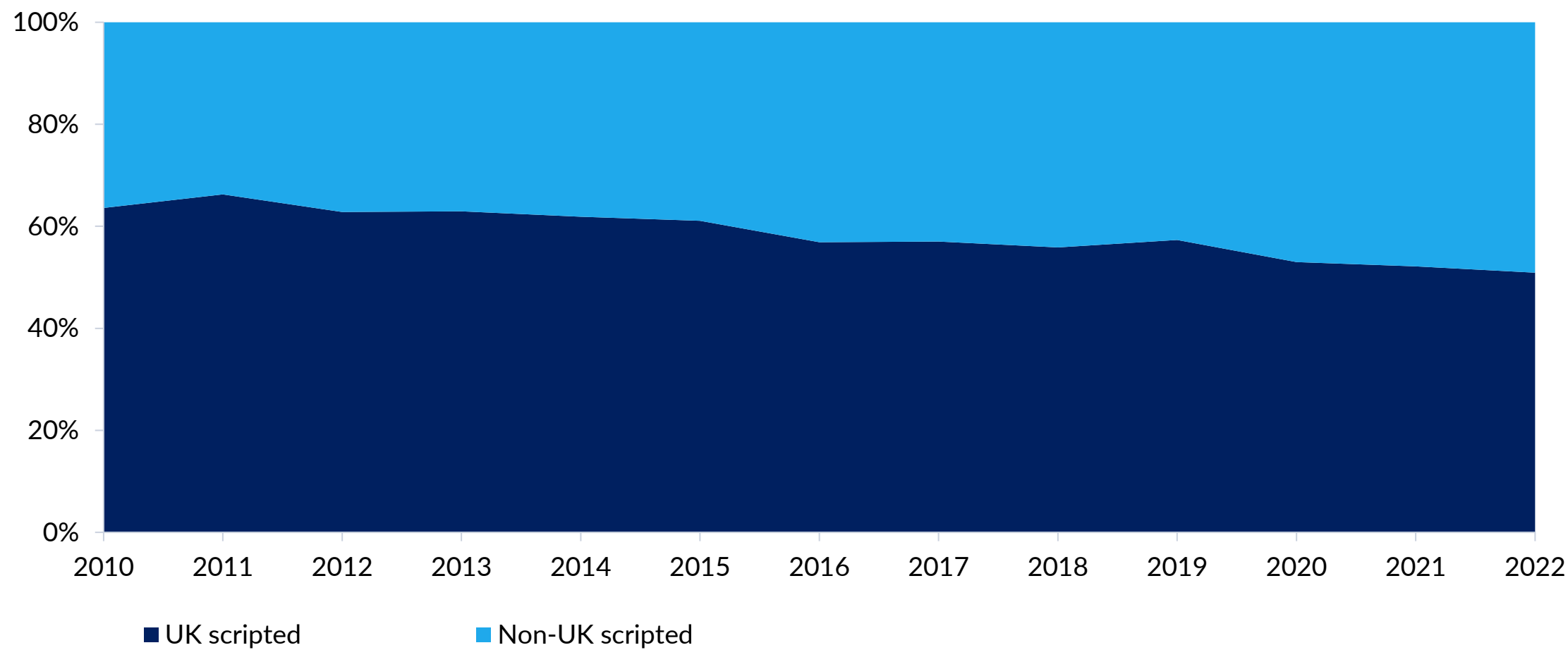


Maximum advertising loads by platform, per hour (min)



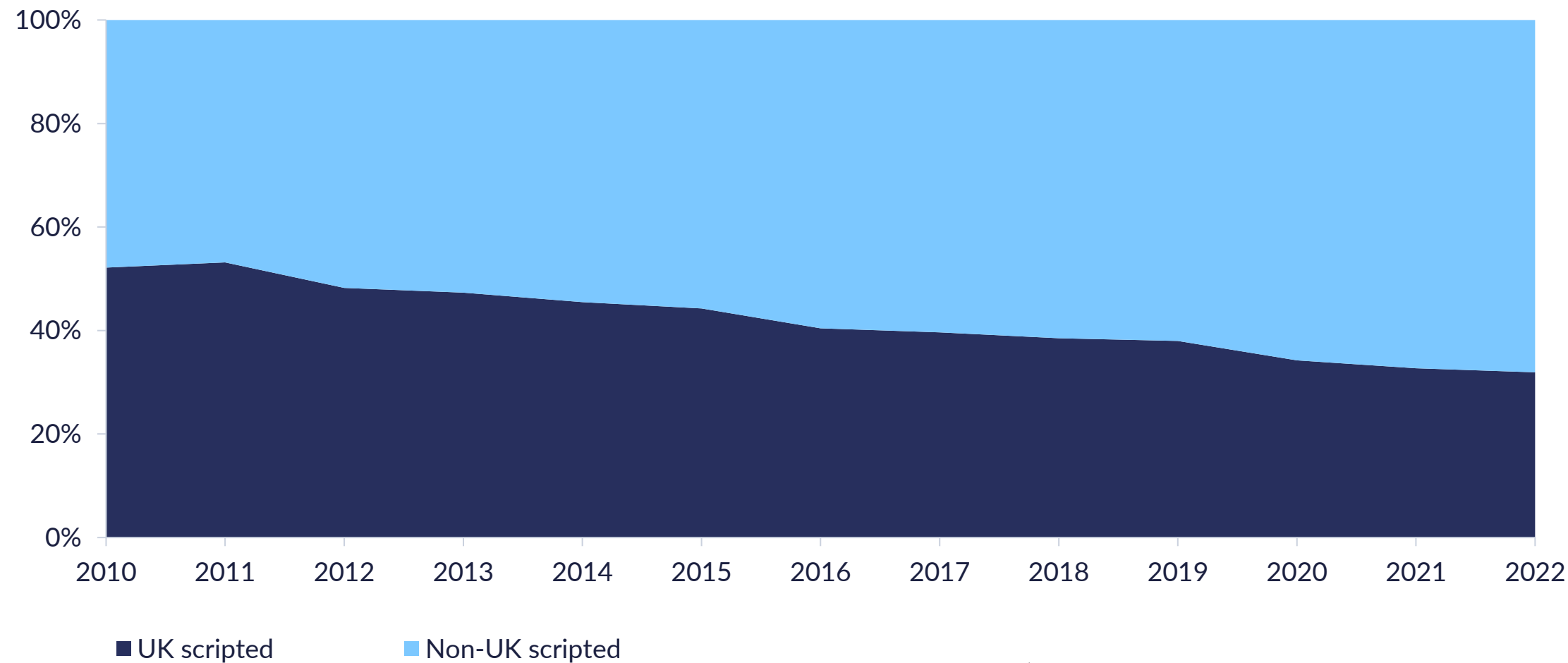
[Source: Enders Analysis]

# Breakdown of UK TV scripted viewing\*, 4+



\*Includes viewing via broadcasters and streaming services of films and scripted series.  
[Source: Enders Analysis, BARB/AdvantEdge, Comscore, ONS, industry research]

# Breakdown of UK TV scripted viewing\*, 16-34



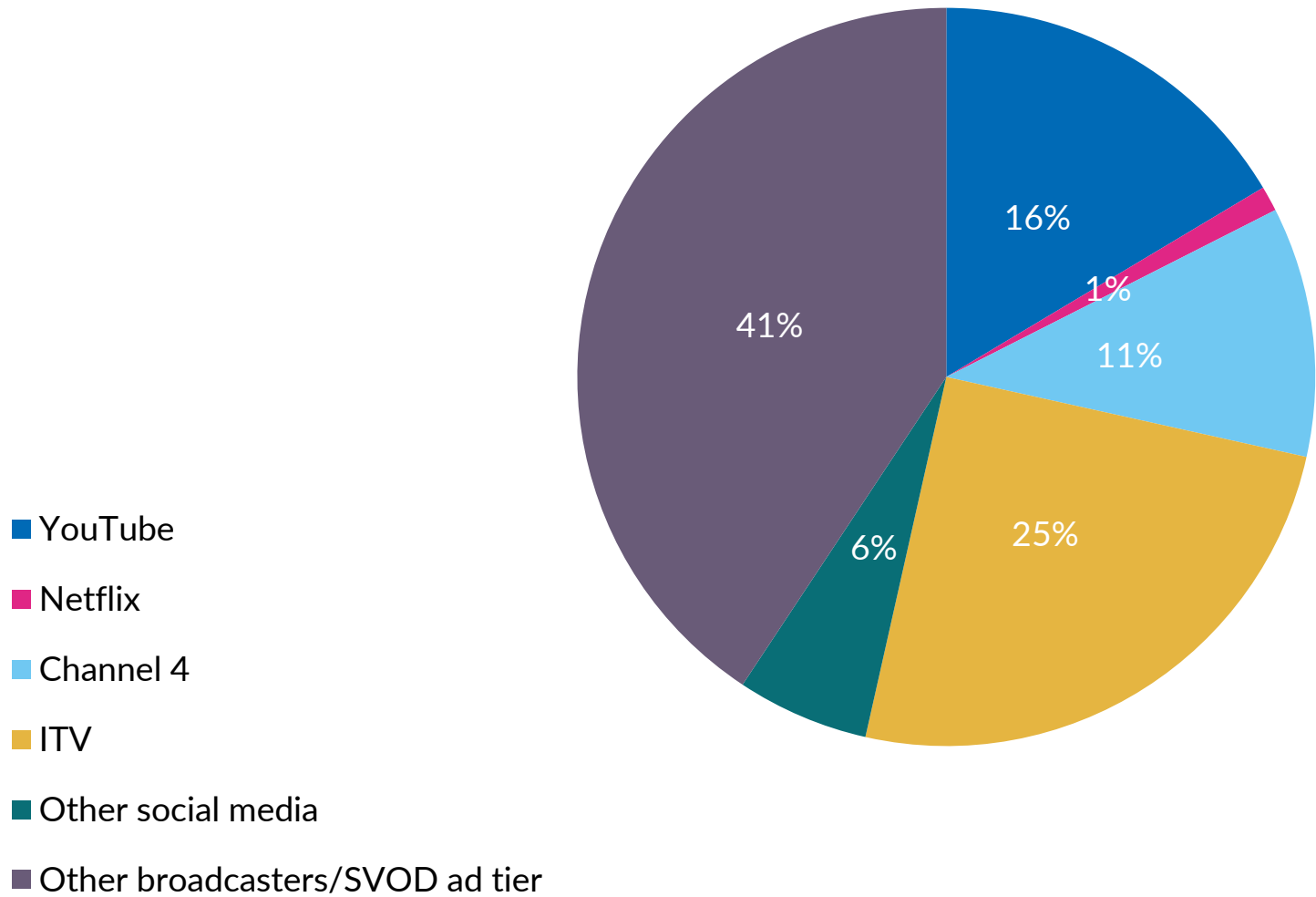
\*Includes viewing via broadcasters and streaming services of films and scripted series.  
[Source: Enders Analysis, BARB/AdvantEdge, Comscore, ONS, industry research]

# Estimated proportion of US Netflix subscribers for each tier



[Source: Enders Analysis]

Potential\* proportions of UK ad-supported video viewing



\*Assuming 10% of Netflix viewing via ad-supported tier.  
[Source: Enders Analysis based on BARB Establishment Survey/RSMB, BARB/AdvantEdge, Comscore, ONS, industry research]



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