



Spotlight on Catch-up TV

Television content on demand



Australian Government



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Over the past four years, all five free-to-air broadcasters have launched dedicated 'catch-up TV' websites offering recently broadcast television programs on demand. This commitment from established media players to delivering content via the internet is a clear indicator of the evolving ways in which audiences are engaging with long-form screen content.

The shift in consumption patterns is being fuelled by factors such as faster download speeds, a growing array of online rental, subscription and download services and, significantly, peer-to-peer file sharing.

However, free-to-air television broadcast viewing remains the most ubiquitous form of media consumption in Australia, with 94 per cent of the population watching an average of more than three hours per day.¹ Given this dominance, it is reasonable to expect that the networks' on-demand services will play a key role in attracting a critical mass to online viewing as the market matures.

While their primary purpose is to enable viewers to 'catch up' with popular programming, catch-up TV services do more than just duplicate the primetime broadcast schedule. They also provide alternative programming to the broadcast offerings, including archives of programs that have aired on Australian free-to-air TV in the past and a limited amount of content that has not aired locally at all.

What's on offer?

To better understand the types of content being offered by these on-demand sites, Screen Australia monitored each of the five free-to-air catch-up services for four weeks from 13 February 2012, coinciding with the start of the 2012 television ratings period.

During these four weeks, an average of 407 titles was available each week (approximately 1,308 hours of content). By comparison, 64 feature films screened in cinemas and 1,005 television programs were broadcast on free-to-air television each week over the same period.

Content offerings – weekly average

	iView	SBS On Demand	Plus7	NineMSN Video	Watch TV	TOTAL
Titles	184	87	43	23	71	407
% recently broadcast	97%	85%	51%	54%	60%	81%
Hours	305	214	192	345	251	1,308
% recently broadcast	98%	58%	21%	8%	60%	49%

The available content varies from week to week as episodes expire and are replaced by new ones, and, to a lesser extent, titles are added and removed from the catalogue. Back catalogue content tends to remain on the services for extended periods of time, so the range of this content on offer is fairly static on a week-to-week basis. The titles available on SBS On Demand vary more than the other services, due to the greater number of one-off programs such as feature films and documentaries.

Recently broadcast episodes or standalone programs made up 81 per cent of available titles and 49 per cent of the total hours. The remaining content comprised back catalogue that had

¹ Roy Morgan data compiled by Screen Australia, 2011, *Beyond the Box Office: Understanding Audiences in a Multi-Screen World* (www.screenaustralia.gov.au/research/beyond_box_office.aspx)

been broadcast on Australian television in the past and a limited number of titles that had not aired locally on free-to-air television.

Overall, the range of program types available on a network's catch-up service was more limited than its weekly broadcast offering, with some services providing little or no children's content, long-form news/current affairs, feature films or sport. Drama and documentary are well represented, as are reality and infotainment programming. Of the 407 titles available on the catch-up TV services:

- feature films and television drama accounted for 27 per cent
- documentaries for 21 per cent
- children's programs for 25 per cent and
- other program types (news/current affairs, infotainment, reality, sport, etc) for 27 per cent.

Content offerings by type – weekly average

	iView	SBS On Demand	Plus7	NineMSN Video	Watch TV	OVERALL
Titles	184	87	43	23	71	407
- Movies/drama	17%	29%	35%	57%	36%	27%
- Documentary	11%	47%	8%	17%	21%	21%
- Children's	49%	0%	16%	0%	7%	25%
- Other	23%	24%	41%	26%	36%	27%
Hours	305	214	192	345	251	1,308
- Movies/drama	17%	17%	46%	51%	20%	31%
- Documentary	8%	29%	3%	14%	8%	12%
- Children's	49%	0%	17%	0%	17%	17%
- Other	26%	53%	35%	35%	56%	40%

Australian content

Overall, 38 per cent of titles (157 programs) and 58 per cent of hours were Australian. In comparison, 33 per cent of titles (332 programs) and 36 per cent of hours broadcast on free-to-air television were Australian. The large proportion of Australian content on catch-up TV services in terms of hours is due in part to substantial back catalogue offerings of Australian programs such as *McLeod's Daughters* series 5–8 and *Sea Patrol* series 1–5 on NineMSN Video.

Australian titles accounted for:

- 17 per cent of drama titles
- 45 per cent of documentary titles
- 31 per cent of children's titles and
- 64 per cent of other types of programming.

Content offerings by source – weekly average

	iView	SBS On Demand	Plus7	NineMSN Video	Watch TV	OVERALL
Titles	184	87	43	23	71	407
- Local content	37%	34%	21%	46%	57%	38%
- Foreign content	63%	66%	79%	64%	43%	62%
Hours	305	214	192	345	251	1,308
- Local content	41%	55%	8%	89%	75%	58%
- Foreign content	59%	45%	92%	11%	25%	42%

Australian drama

On average, 19 Australian drama titles were available each week over the four-week survey period, excluding C and P programs. Just over half these titles had been broadcast recently (ie in the preceding four weeks) while eight were back catalogue titles.

ABC featured the largest number of Australian drama titles, with iView showing first-run series *Outland*, *The Straits*, *Miss Fisher's Murder Mysteries* and *Woodley*, as well as short film *Last Race*.

NineMSN Video had the largest archive of back catalogue Australian drama with 118 episodes of *McLeod's Daughters*, *Sea Patrol* seasons 1–5 and *Rescue Special Ops* season 3. Other back catalogue titles included *Mark Loves Sharon* on Watch TV and *Stories from the Golf* on SBS On Demand.

Although several Australian feature films were broadcast on free-to-air television during this period, including *Welcome to Woop Woop* on Channel Nine, *Razzle Dazzle* on GEM and *My Husband My Killer* on Channel 7, no Australian feature films were made available on these services over the four-week period.

Australian documentary

On average, 38 Australian documentary titles were available each week over the survey period, of which 19 were recently broadcast. Most of the first-release Australian documentaries that aired on the broadcast channels also appeared on the catch-up services, with the exceptions of popular series *RBT* (Channel Nine) and *The Force* (Channel 7).

The Australian documentary titles on the commercial providers comprised long-running observational series such as *Border Security* (Channel 7) and *Bondi Rescue* (Channel 10) as well as some standalone titles on Watch TV.

In contrast, the documentary offering on SBS On Demand and ABC iView represented a range of styles and subjects, reflecting their respective broadcast schedules. Recently broadcast documentaries on iView and SBS On Demand included the series *Once Upon a Time in Cabramatta* (SBS) and the standalone programs *The First Interview* (ABC) and *Kangaroo Mob* (ABC). SBS On Demand also featured high-profile back catalogue titles such as *Go Back to Where You Came From*, *First Australians* and *Immigration Nation*.

How long are programs available?

Programs remain on on-demand services for various lengths of time. For content recently aired on broadcast television, episodes or programs are typically uploaded immediately after broadcast or at midnight and removed between one and four weeks later. During the survey period, 11 per cent of titles were available for 1–7 days, 41 per cent for 8–14 days, 31 per cent for 15–30 days and 17 per cent for more than 30 days.

Some series are 'stacked', meaning that episodes are uploaded after broadcast and remain on the site until the entire series has been broadcast. The stacked series tend to be highly promoted new inhouse or commissioned titles; for example ABC iView 'stacked' local productions *Miss Fisher's Murder Mysteries* and *The Straits* during the survey period.

Window of availability*

	% of titles	% of hours
1–7 days	11%	4%
8–14 days	41%	19%
15–30 days	31%	22%
Over 30 days	17%	56%

*Excludes Watch TV content as this service does not advise the window of availability

Programming strategies

All the catch-up TV services emphasise popular primetime content. Excluding news and sports, most primetime content is made available after broadcast and is promoted in a 'Featured Content' category on the homepage.

Beyond providing primetime content, each service has its own distinct programming strategy.

ABC iView

Of all the services, iView offers the largest amount of content in terms of titles. Over the four-week survey period, iView offered 184 titles on average each week, totalling approximately 305 hours of content.

iView primarily provides recently broadcast content, with back catalogue or exclusive content comprising only 3 per cent of titles and 2 per cent of hours. iView's back catalogue or exclusive content included UK documentary series *Peschardt's People*, classic animated series *Astro Boy*, and *Untidy Desk*, a series presenting live music performances.

iView is distinguished by the substantial amount of children's and preschool content, which is generally under-represented on the other services; in contrast, SBS On Demand and NineMSN Video had no children's content, while Plus7 and Watch TV had a handful of titles. The ABC reports that children's programs are amongst the most successful content on iView.² Children's content garners a relatively high number of plays in part because the programs typically have short durations, longer windows of availability and more episodes available at any one time.

SBS On Demand

SBS On Demand had the second-largest content offering in terms of titles, providing on average 87 titles a week, totalling approximately 214 hours of content.

SBS On Demand is the only catch-up TV service to regularly offer feature films, with 16 films available on average each week. Although feature films achieve relatively low ratings on SBS broadcast channels, due in large part to airing outside peak viewing periods, they frequently appeared in the 'Most Popular' category of SBS On Demand.

²*Inside Film*, 'ABC TV's Clean Sweep of the AIMIA Awards', 23 March 2012 (<http://if.com.au/2012/03/23/article/UNWYDJOBGY.html>)

The types of programs on SBS On Demand broadly reflect its recent broadcast schedule, with an emphasis on food programming and documentary. SBS On Demand also offers back catalogue content consisting primarily of local productions, for example variety show *RockWiz*, current affairs series *Living Black* and animated series *World Tales*.

Plus7

There were on average 43 titles available on Plus7 each week, totalling approximately 192 hours of content.

The recently broadcast programs largely consisted of primetime Australian and US drama and reality series. Exceptions included infotainment series *Better Homes and Gardens*, sports panel series *Santo Sam and Ed's Sports Fever* and US documentary series *Universe*.

Plus7 is notable for its large back catalogue, which accounted for 79 per cent of the hours available per week on average. This programming comes from a range of content partnerships including Sony Pictures International Television and Comcast International Media Group and includes offerings such as episodes of US variety series *Saturday Night Live* dating back to 1976 and US drama series *Just Shoot Me*, *The Jeff Foxworthy Show* and *Ned and Stacy*. These content partnerships allow Plus7 to offer television programs that have not aired on Australian free-to-air TV or have aired on other local networks.

NineMSN Video

Although NineMSN Video had the most limited offering in terms of titles, on average 23 per week, these titles accounted for a large number of hours – approximately 345 per week. 92 per cent of the hours available on NineMSN Video were back catalogue content. With the exception of UK series *Thunderbirds*, all were local productions.

The recently broadcast content on NineMSN Video comprised US, UK and Australian drama, reality and documentary programs.

Watch TV (Network Ten)

Watch TV had the largest and most varied content offering of the commercial networks, presenting programs from across the broadcast day and from a greater variety of genres. There were on average 71 titles available each week, totalling approximately 251 hours of content.

Watch TV differs from the other services by offering separate websites for Ten's digital multi-channels Eleven and One, whereas the other services integrate multi-channel content and main channel content on the one website. Watch TV also provides separate catch-up TV iOS apps for the main broadcast channel, Eleven and Ten Sports.

Watch TV features comprehensive archives of local reality and infotainment productions such as *Masterchef*, *Junior Masterchef*, *Ready Steady Cook* as well as preschool series *Wurrawhy*. Watch TV's online exclusive content also includes a monthly set of episodes from classic TV series airing on digital multi-channel Eleven, which can only be accessed online.

Access to catch-up TV services

Catch-up TV content can be watched through various platforms: computers, television sets and mobile devices such as smartphones and tablets. Access through computers is achieved by way of the broadcaster's catch-up TV websites. For mobile devices, programs are also accessed through the broadcaster's websites or, for ABC iView and Ten's Watch TV, via

dedicated iOS apps. Some catch-up TV services can be accessed on television sets via PlayStation 3 and Xbox 360 games consoles or television apps for selected brands of internet-connected television sets and Blu-ray players.

At present audiences are primarily accessing catch-up TV via computers. However, with the increasing penetration of internet-connected televisions coinciding with more accessible fast broadband, the ability to watch catch-up TV services on television sets is expected to become increasingly ubiquitous.

Australian catch-up TV services, average weekly offerings, February 2012.

	iView	SBS On Demand	Plus7	NineMSN Video	Watch TV	OVERALL
TITLES: All programs*	184	87	43	23	71	407
- % Australian	37%	34%	21%	46%	57%	38%
- % recently broadcast	97%	85%	51%	54%	60%	81%
Movies/drama	17%	29%	35%	57%	36%	27%
- % Australian	12%	19%	13%	18%	12%	17%
- % recently broadcast	100%	86%	61%	75%	64%	80%
Documentary	11%	47%	8%	17%	21%	21%
- % Australian	38%	32%	31%	80%	86%	45%
- % recently broadcast	85%	89%	69%	20%	38%	75%
Children's	49%	0%	16%	0%	7%	25%
- % Australian	29%	n/a	0%	n.a.	100%	31%
- % recently broadcast	99%	n/a	100%	n.a.	100%	92%
Other programs	23%	24%	41%	26%	36%	27%
- % Australian	70%	54%	34%	83%	76%	36%
- % recently broadcast	99%	75%	60%	33%	61%	76%
HOURS: All programs*	305	214	192	345	251	1,308
- % Australian	41%	55%	8%	89%	75%	58%
- % recently broadcast	98%	58%	21%	8%	60%	49%
Movies/drama	17%	17%	46%	51%	20%	31%
- % Australian	12%	13%	3%	82%	16%	44%
- % recently broadcast	100%	89%	27%	7%	81%	40%
Documentary	8%	29%	3%	14%	8%	12%
- % Australian	36%	51%	9%	98%	80%	65%
- % recently broadcast	87%	78%	28%	2%	39%	51%
Children's	49%	0%	17%	0%	17%	17%
- % Australian	32%	n.a.	0%	n.a.	100%	40%
- % recently broadcast	99%	n.a.	100%	n.a.	100%	85%
Other programs	26%	53%	35%	35%	56%	40%
- % Australian	79%	72%	17%	95%	87%	77%
- % recently broadcast	99%	38%	22%	11%	44%	41%

Source: Screen Australia

Notes: * Weekly average four weeks from 13 February 2012