



# Netflix UK - Heavy Medium and Light Viewers

**A SoDA UK Analysis Report by Digital-i**

January 2020 - June 2020

<https://www.digital-i.com/services/analytics/>

*Where are we getting  
this information from?*

The detailed viewing data for this report has been pulled directly from Digital-i's coveted SVOD Analysis software SoDA.



# Introduction

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**In 2019, we launched SoDA, our research tool designed to allow for detailed analysis of viewing to content on SVOD platforms.** The accuracy, granularity and novelty of this viewing data has begun to answer the same questions about Netflix as BARB data does about TV, and has been received with great interest.

Ever since, we have been experimenting with ways to add features onto our platform that enable even more detailed cuts of the data and, ultimately, **provide a deeper level of insight from the platform. This year,** we released a function that opens the door on viewing behaviour segmentation for advanced SoDA users, be it to particular programmes or genres, or by the amount a segment of households views. The possibilities for key strategic insight are endless.

In this report, we have used this functionality to produce a heavy/medium/light (HML) viewer analysis on the UK Netflix subscriber base in the first half of 2020, *including the lockdown period*. In this report we dive into the detail of HML Netflix households, to see what look like, how much they view and what particular content brings them into the platform.

**Understanding the difference between these types of viewers has always been a very important element of TV research, perhaps even more so in a world where SVOD continues to take viewing away from linear TV.** Subscriptions are now a major revenue driver in the industry, so keeping subscribers hooked into a service and using it often can be the key to maintaining this revenue. Equally, appealing to the less heavy SVOD viewer can be the best way to drive subscriber increases and increase market share. Netflix are the leading SVOD service in the world, and **being able to break their subscription base down in this way is a vital tool when it comes to understanding how they develop loyalty among viewers as well as continuing to grow subscription levels worldwide.**

In the first section of this report, we provide an overview of some **key facts** about the viewing of HML households on Netflix in general and move on to discussing the make up of these households. In section two, we investigate the different types of content that appeal to these groups, this includes a more in depth look at the differences between heavy and light households.

## Data Definitions

Heavy, Medium and Light groups based on 1/3 of sample, based on ranking each household on total streams across Jan - June 2020.

Time spent estimates based on the estimation that each stream is an average of 33.25 mins. (based on data modelling using BARB non-linear data).

All data reported at household level, no duplication of streaming for viewers per view.

Netflix originals based on any content labelled as an 'original' on UK Netflix (including content exclusive to Netflix in the UK).



## HML Households – An Overview

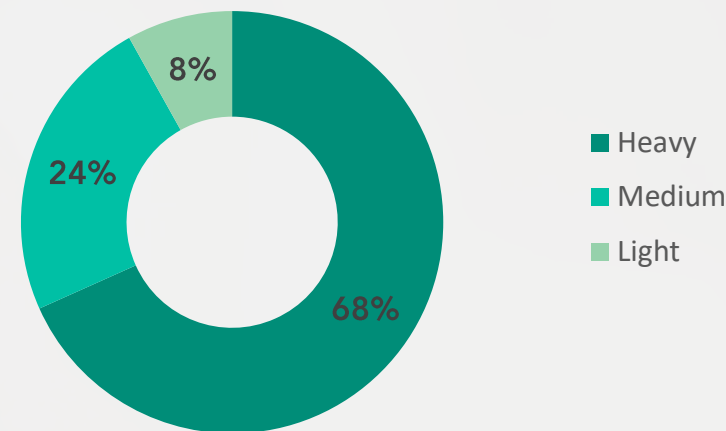
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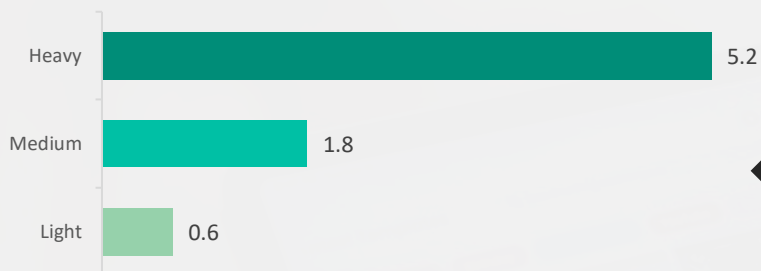
# Netflix HML Analysis Key Facts

The heaviest 33% of households (HH) contribute more than 2/3 of all streams on Netflix, the lightest only 8% of streams.

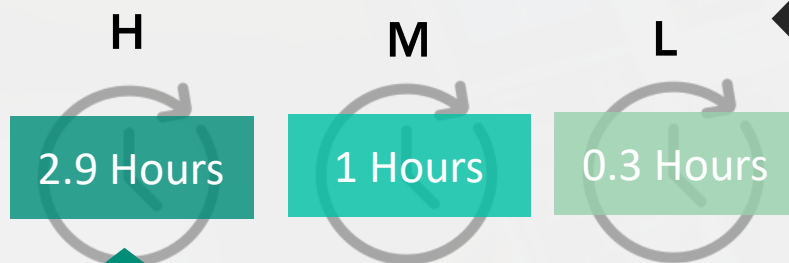
% of Total Streams



Ave Streams Per Day, Per Household



Ave Time Per Day, Per Household



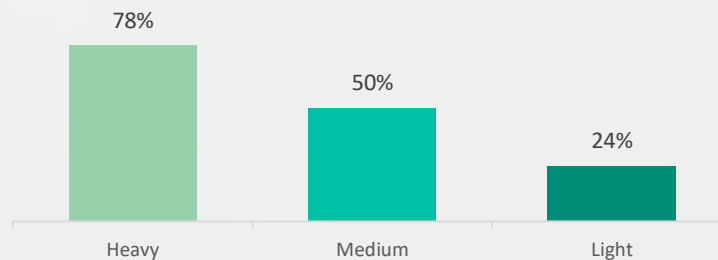
Heavy HH have been averaging more than 5 streams per day.

This equates to an estimated 2.9 hours of viewing per day.

Medium HH are spending an hour per day on Netflix whilst light HH spend approximately 20 mins per day.

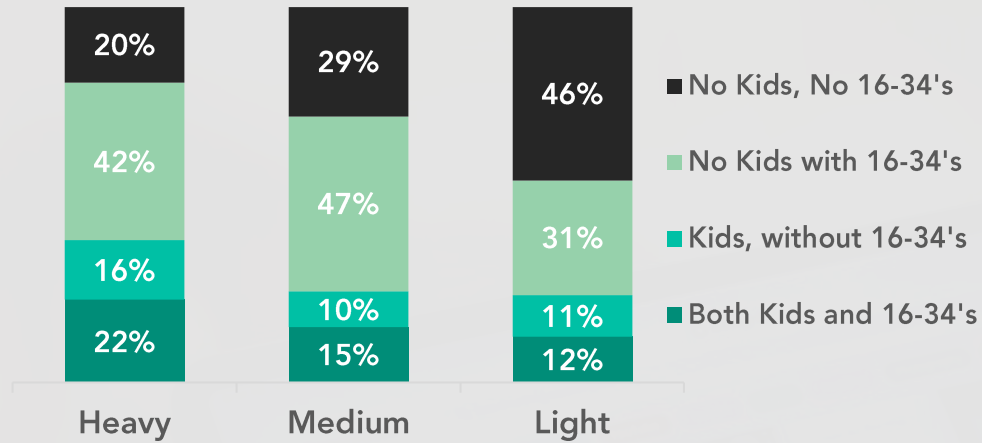
Only 24% of light HH watch Netflix every day. Half of medium HH and over 3/4 of heavy HH log on every day.

Ave Daily Reach %

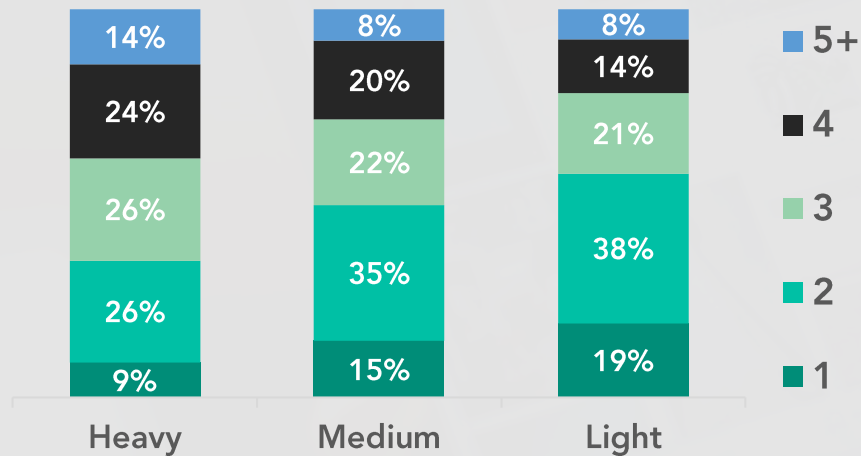


This means that approximately 20% of all households in the UK are spending an average of just under 3 hours per day on Netflix. That's around 15 million hours of viewing every day.

HML split by Household Characteristic



HML split by Household Size



## Household Information

Light Netflix HH tend to have a smaller household size than the other segments (1-3 people). A relatively small proportion of them have kids and 46% are made up of people aged 35+.

The medium group has the largest proportion of HH that contain people aged 16-34 and do not live with kids (47%), of these medium viewer households with young people, only 25% of them also have kids.

The heavy viewer group has the highest proportion of HH with kids (38%), and also the highest proportion of large HH (4 people +). There are relatively few heavy HH that only contain people aged 35+.



HML Households – Content Analysis



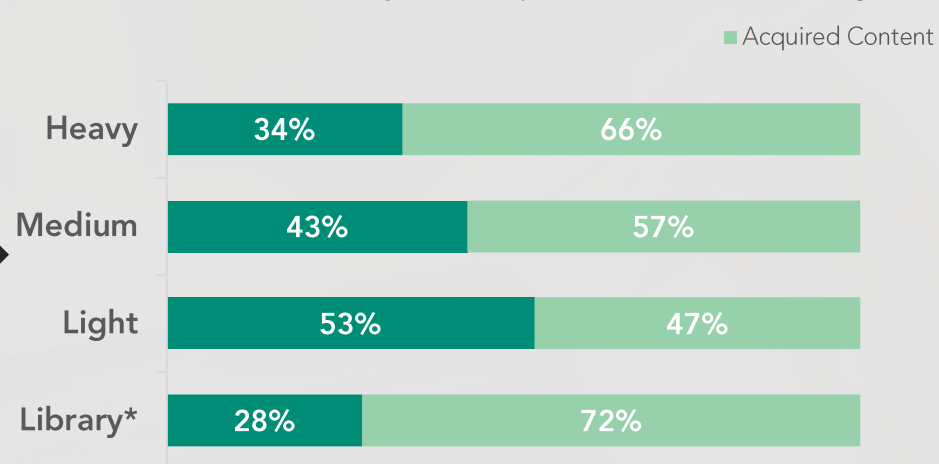
**There is a relatively significant difference in the way that different types of HH distribute their time between original Netflix content, and content acquired by Netflix.**

Only 28% of the Netflix library is made up of original content, however **all these HH groups spend more than 28% of their streaming time watching Netflix Originals.**

Having said that, acquired content is more popular with heavy HH than it is with light HH.

*2/3 of streaming from heavy HH is made up of viewing to acquired titles, whilst light HH spend over half of their time with original content.*

% of total streams x Netflix Original vs Acquired Content



\*based on number of episodes/movies

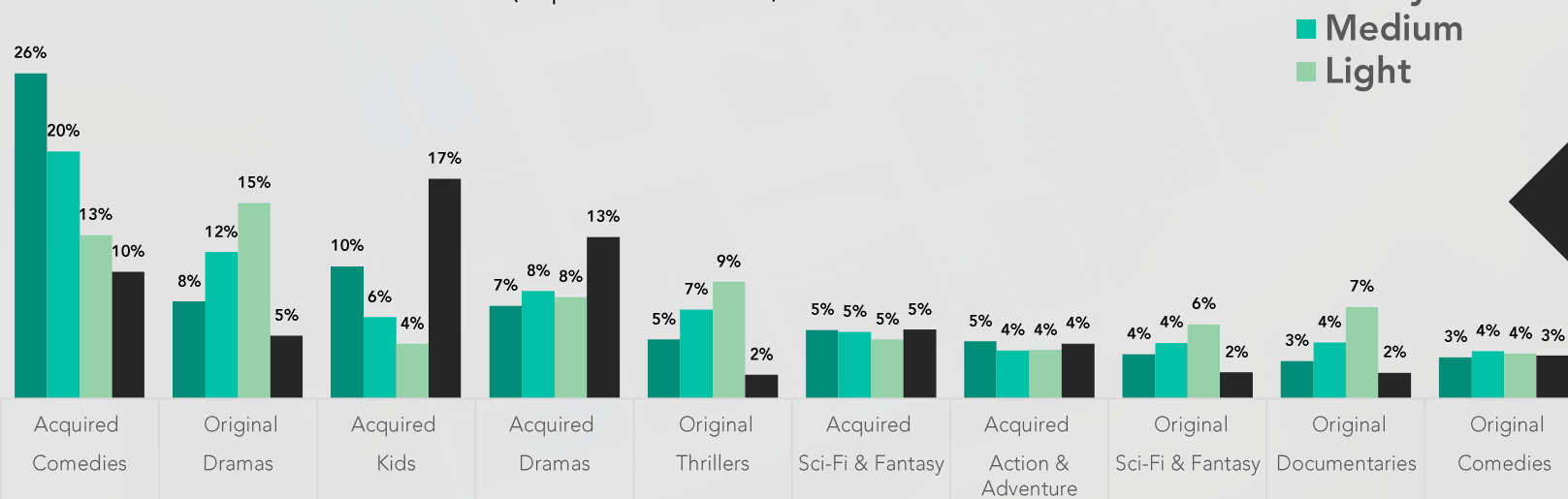


**You cannot underestimate the importance of Netflix's acquired comedy content.**

Netflix has developed a strong catalogue of acquired comedy content. The acquisition of the rights to house all 10 seasons of *Friends* at the beginning of 2018 was a huge scoop for the platform! In fact, the data points to this acquisition playing an important role in generating a wave of heavy viewing. Since then, Netflix has acquired many other similar, popular and long-running comedy series, which we will discuss in more detail later in this section.

**Heavy viewing is driven by acquired comedy and kids.** Acquired comedy makes up over 1/4 all their streaming sessions and kids content also makes up a strong proportion of viewing for heavy Netflix HH.

% of total streams x Classification & Genre (Top 10 combinations)



\*based on number of episodes/movies



Netflix's investment in its original content has often been cited as a major contributor to its continued success at driving subscriber numbers worldwide. How do we know this to be true? Because of light viewing households...

Original dramas make up 15% of all streaming for light HH with thrillers and docs also proving relatively popular. Interestingly, 13% of their viewing is to acquired comedy suggesting that light HH are also dipping into Netflix's rich library of comedy acquisitions.

**In contrast, acquired drama content tends to underperform across the board.** In fact, the library of acquired drama content is bigger on Netflix than acquired comedy, but its contribution to streams is significantly lower. These types of insight are invaluable when it comes to pitching to the likes of Netflix or planning acquisitions for a streaming platform.

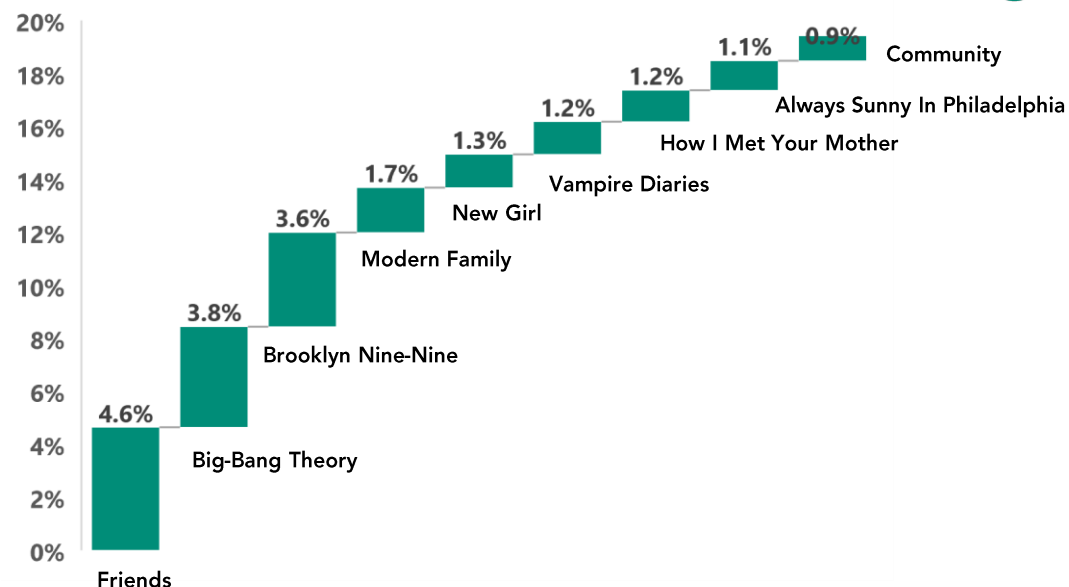
## US acquired content maintains engagement with loyal viewers who want to 'unwind'.

Each of the long-running American series in the chart below have in excess of 100 episodes available on Netflix, in total they amass over 1600 episodes! If we sum these US behemoth series together they make up **almost 20% of all viewing for heavy HH**. But, why is this content so popular?

Thinkbox identified 'unwind'\* as one of the key need states that the consumption of content satisfies. They said, "Familiarity is key. Content which lightens the mood, such as comedy, light entertainment or familiar dramas are preferred. People will happily watch programmes they have already seen when in this need state." There is clearly a lot of this going on here, with heavy viewers using light and recognisable titles to fulfil the unwind need state.

Netflix is particularly strong in this area and it is likely that many heavy Netflix viewers are reliant on Netflix to fulfil this need state.

% of streams x Title, Heavy HH (Top 9)



## HEAVY VIEWERS: CONTENT

### Netflix Originals drive up reach with the perfect content for escapism.

When we start to look at HH reach, the picture is slightly different. This refers to the % of HH that have watched at least one episode of the series, or the movie at least once. The top 10 is entirely made up of Netflix Original content, showing that Heavy HH are also heavily invested in the original content that Netflix are producing.

**Generally speaking, on Netflix, this is the content that has the power to bring in the highest numbers in terms of reach, especially when shows feature prominently on Netflix's home page and in the new daily top 10 feature.**

This content serves to satisfy the 'escape' need state identified by Thinkbox, all the series and movies in this list provide their viewers with an opportunity to escape and get lost in stories or the lives of others (much needed in 2020!). *Tiger King* and *The Stranger* in particular have experienced astronomical levels of reach with heavy HH in the first half of 2020.

Top 10 New Series/Movies\*, Heavy HH, Reach %

Title	Season Number	Reach %
Tiger King	1	80.2%
The Stranger	1	77.6%
Sex Education	2	59.2%
After Life	2	54.8%
Locke and Key	1	54.2%
Spenser Confidential	-	53.3%
Extraction	-	50.5%
White Lines	1	48.1%
The Hustle	-	46.7%
Love Is Blind	1	45.9%

\*Released onto Netflix between 01/01/20–31/05/20



# LIGHT VIEWERS: CONTENT

## Do not underestimate the importance of Light Viewers.

In content analysis, light viewers provide a particularly interesting case study as they, more than the other groups, represent the floating voters. We can think of them as swing states or constituencies in politics. In a market that is becoming increasingly crowded with SVOD services, these types of HH will be vital in the competition for market share. Netflix will need to make sure it continues to serve these viewers with enough new content that engages them in order to keep them on board.

Content such as *The Stranger* and *After Life* are perfect examples of this, both shows achieved relatively high levels of coverage with light HH, and also had high levels of engagement. 76% of those who watched at least 1 episode of *The Stranger* went on to view the whole series, this figure was 84% for *After Life*.

Content is the greatest weapon in the battleground for the light viewer, understanding the types of content that appeal to these more fickle viewers may well be the difference between success and failure in the increasingly competitive SVOD market.

## Another key factor in this battle for SVOD supremacy will be identifying groups who are looking for niche content and supplying them with enough content to keep them on board.

One area where this has become particularly apparent in recent months has been in sports based content. Amazon have been particularly active in this area with their *All or Nothing* series and documentaries about sports personalities such as Andy Murray.

Netflix have also had some success in this area, in particular with their recent documentary *The Last Dance* which was co-produced with ESPN TV and centred around Michael Jordan and the Chicago Bulls in the 1990s.

Interestingly, this content appears to be particularly appealing to the light viewer. When you isolate the series for which light viewers make the most significant contribution of their total streams, all the top 4 are sports based series. 27% of all streaming to *The Last Dance* came from light viewers, they also contributed over 25% of the streams to the second series of the popular *Formula 1 docuseries Drive To Survive*. Considering that these viewers only contribute 8% of all streams on the service, these are relatively significant figures and show how appealing to the interests of light SVOD users could well be an important tool for attracting these floating voters.



Top 10 New Series/Movies\*, Light HH, Reach %

Title	Season	Reach %
Tiger King	1	46.8%
The Stranger	1	45.0%
After Life	2	30.2%
White Lines	1	23.3%
Jeffrey Epstein: Filthy Rich	1	21.1%
Sex Education	2	18.5%
Locke and Key	1	18.4%
Messiah	1	18.3%
Uncut Gems	-	17.9%
The Hustle	-	15.9%

\*Released onto Netflix between 01/01/20– 31/05/20

Top 10 Series\*\*, % of total streams delivered by light HH

Title	Season	% of Streams Delivered by Light
The Last Dance	1	27.0%
Formula 1: Drive to Survive	2	25.4%
Sunderland 'til I Die	2	24.4%
The English Game	1	24.3%
Narcos: Mexico	2	23.8%
Better Call Saul	5	23.5%
Jeffrey Epstein: Filthy Rich	1	20.6%
After Life	2	20.6%
Mindhunter	1	20.0%
Lost in Space	2	19.9%

\*\*Excluding any content with less than 5m streams (total)

# Gain access to Digital-i's incredible SVOD data through SoDA

SoDA (Subscription on Demand Analytics) is an online portal that allows users to navigate a large database of international Netflix viewing data.

Digital-i pioneered a method of measuring Netflix viewing from all devices (including TVs), back-data from 2017 and episode-level reporting.

Our services are used by the UK's biggest broadcasters and international American studios to improve their SVOD and VOD players, content catalogues and release strategies.

For more information about SoDA and its capabilities contact

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*"SoDA is opening the door on Netflix viewing like never before, enabling us to deliver insights that were simply unattainable a year ago."*

Philip Martin and Paul Craigen, ITV