Reaching the age of 40 is a moment for both reflection and looking forward. BARB reaches this milestone in the summer, although celebrations will be suitably restrained.

Since 1981, our audience ratings have guided decisions on the commissioning, scheduling and distribution of television programmes. Equally, the advertising industry has relied on our data to support the planning and buying of television campaigns. And our audience viewing figures play an important role in the regulatory debate about how media services operate in the public interest.

To these ends, BARB’s service comprises three essential components.

Our 360° Audience View reports who watched what, when, with who and on which device. Having reported audiences for broadcasters’ linear channels since day one, we’ve added their VOD services in recent years. Veriça Djurdjevic, Channel 4’s Chief Revenue Officer, highlights in this year’s report how these audience ratings help broadcasters develop a multi-platform windowing strategy.

We also have an emerging capability to report audiences to SVOD and video-sharing services that don’t yet actively participate in our measurement. Vicky Fox, OMD’s Chief Planning Officer, takes a look at the new insights and considers how they will improve our collective understanding of the impact of these streaming services.

BARB launched a BVOD campaign-planning service in beta during 2020. Harnessing with our long-established reporting of linear campaign performance, the Advanced Campaign Hub helps buyers and sellers of advertising assess the incremental reach and frequency delivered by BVOD. Ruth Cartwright, Sky Media’s Director of Investment, reviews how this development — working in tandem with CFlight — is meeting the advertising industry’s need for comprehensive planning and reporting of total TV.

Critically, BARB has also embraced Big Data Integration. Our audience reporting is underpinned by a combination of panel data and census-level viewing for BVOD services, while our data can be ingested into customers’ own systems to facilitate business-planning processes. Emma Moorhead, General Manager at Wavemaker, showcases how our data flow into a proprietary cross-platform planning tool.

A big thanks to all our guest contributors for bringing to life how BARB’s continuous service development ensures we meet the needs of our industry.

Building on this strong set of foundations, we’ve just announced the award of long-term research contracts. This fresh news underscores the commitment of the UK television and advertising industry to independent, objective and transparent audience measurement.

There’s a great deal to look forward to as we deploy innovative metering technology in an expanded service. There will be the largest-ever increase in reporting sample to 7k homes, in which Kantar will install its new TV-set meter. This takes form of a tablet device and features an original avatar-based registration system.

Oh, and there’s a new website for you to keep in touch with news and insights throughout the year. Find out more about What People Watch — our dedicated portal for subscribers — on page 12 of this report.

Hello, Justin Sampson
Chief Executive
BARB
BARB’S 360° AUDIENCE VIEW INFORMS WINDOWING STRATEGY

Left: It’s A Sin © Channel 4

It’s A Sin is one of Channel 4’s biggest successes of 2021. It is also a really interesting case study in terms of how we at Channel 4 used BARB data and insights to inform an innovative windowing strategy going forward.

Let’s start at the beginning with the story of what we would expect from a normal drama, under normal transmission circumstances. So, once upon a time we would put the drama out, obviously with lots of marketing and promotion, and there would be excitement and build up to the first transmission on linear TV. That build up would generally be quite a good indicator of what we would expect from a normal broadcaster to keep or extend the audience, and it is hard for us to put a clear value on the audience for our advertisers.

With this in mind we thought a little bit differently with the release of It’s A Sin. We followed a very deliberate strategy to make this a landmark piece of PSB programming. We took a different approach to the window and how we were going to release the drama. What we did was run episode one live, and also then allowed — indeed promoted — box-set previewing on All4.

What was fascinating about this was that we saw a completely different set of viewing results than those that we might expect.

This approach allowed us to extend and build the audience as well as optimising the momentum of the show. As the weeks went by, we saw from the 360 degree BARB data that almost 4 million viewers watched episode five on All4 well before it ever went live on TV. In fact, two-thirds of the episode 5 audience watched it before transmission date, and 88% of these pre-broadcast viewers watched on All4 via the big screen in the corner of the room.

As a result of this approach, we also derived some very clear benefits in terms of the BARB data and the insight that it brought for us.

The first is that we can see exactly who watched the show when they watched it and indeed where they watched it, which helps me inform future decisions about the release patterns of upcoming shows.

The second thing is that we can now put a total value on the program as a whole. So not just the live and consolidated picture but also the binge viewing. And that means we can get the reach of the total audience, and speak to advertisers about that for future shows.

This show had an extraordinary impact in the real world, as well as in terms of viewing. We saw record-breaking levels of demand for HIV testing, as well as the biggest ever fundraising months for leading HIV and AIDS supporting charities. It’s A Sin was a really powerful piece of PSB programming that had incredible viewing success and a real impact on society, which of course is the channel living up to its purpose of creating change through entertainment.

We’re committed to taking these learnings and others that we’re deriving from BARB data to feed into our test-and-learn approach for our future programme windows, and how we treat them.

Veriça recently spoke at the BARB Briefing event. To view the presentation, click here.

Veriça Djurdjevic, Chief Revenue Officer, Channel 4
WHAT’S NEXT FOR BARB’S 360° AUDIENCE VIEW

There’s a huge amount of trust in the BARB data as the gold-standard measurement currency for TV viewing. The incredibly rich dataset enables us to understand not just the volumes and the shares, but those nuances of audience flow across channels and how favourite shows deliver incredible loyalty from the audience. This insight powers our planning output.

We’ve seen the TV landscape change so incredibly quickly over the last 10 years that our planning job has required us to combine many different datasets together to build a true picture of someone’s media day. The types of viewing behaviour that we’ll soon be able to explore with BARB’s router-meter solution will essentially become the viewing norms of the future. Our viewing patterns are influenced by how we switch platforms when we view content. We might catch up on a tablet, watch a laptop in bed or use the streaming capabilities of connected TVs which have become the default technology.

So many people now have all those various devices, which is why we absolutely need to understand how audiences use apps and devices and navigate EPGs to view live television or catch-up. Understanding how reach and frequency across BT, Sky and Amazon Prime for the commercialised part of Amazon Prime – even though it’s a small part of their overall content portfolio. Live sport is crucial for building reach, and therefore I need to understand how I create joined-up plans across BT, Sky and Amazon Prime. BARB’s new dataset will enable that.

Understanding how reach and frequency builds is the essence of media planning. Balancing them out is key to why television is so incredibly powerful for brands at driving ROI. The new dataset from BARB is going to help agencies to plan both dimensions more effectively. BARB already helps us to understand how reach builds – per pound spent – through the programmes and channels people watch. This insight informs the emotional connection that advertising can make with the audience.

Very soon we will know more about how viewing overlaps across different platforms, which is a strong driver of frequency. Frequency is great for helping your advertising cut through, driving comprehension and emotional connection. But if you build too much frequency and not enough reach, you’re weakening the power of your television advertising. For example, if we keep spending against campaigns that aren’t driving reach but are driving excess frequency, it’s not just wasteful, it can start to have a negative impact by making the audience feel bombarded by that advertising.

I am really looking forward to the new data that’s coming from BARB later in 2021. Already, new data on programming are providing important insights to help us build our campaigns. For planners, that’s a stepping stone to the potential of that holy grail of managing the total inventory of our clients’ advertising across all the different platforms; and really getting a holistic view of television delivery for the future TV marketplace. BARB’s new developments will help us build more successful advertising campaigns.

Vicky Fox recently spoke at the BARB Briefing event. To view the presentation, click here.

THERE’S A HUGE AMOUNT OF TRUST IN BARB AS THE GOLD-STANDARD MEASUREMENT CURRENCY FOR TV VIEWING
BARB AND CFLIGHT COMBINE FOR TOTAL TV PLANNING

Sky uses BARB’s Advanced Campaign Hub alongside Sky Media’s CFlight to plan and evaluate campaigns across our VOD and linear channels. And Sky is pleased to be working with Channel 4 and ITV to ensure CFlight is the industry’s first unified advertising metric for live, on-demand and time-shifted commercial impressions across all mainstream viewing platforms in the UK.

The campaign planning side allows integrated planning across broadcast airtime and BVOD. BARB’s panel data on broadcast viewing combines with RSMB’s model of BARB panelists’ BVOD viewing of each broadcaster’s VOD player. And CFlight works alongside that as a post-campaign evaluation tool. While they have different purposes, they are now integrated to provide a holistic campaign performance report. It means we can now look at the full picture.

The BARB BVOD Planner is of great value prior to a campaign going out, enabling us to understand potential cross-platform reach from the combination of broadcast airtime and VOD. Then post-campaign we get CFlight reporting which is based on an innovative methodology developed by RSMB based on the BARB gold standard. It means we’re working to high metrics, high standards.

Of course, BARB and CFlight are two different sources, so it’s important for agencies and their advertiser clients to have confidence about the comparability of the data and the ability of the two sources to be integrated well.

We can be confident. For the vast majority of campaigns, when we investigate platform reach using BARB’s BVOD Planner or CFlight’s campaign reporting, we see similar levels of reach reported by both. This validates campaign reporting, we see similar levels of reach using BARB’s BVOD Planner or CFlight when we investigate platform coverage when campaigns are validated in CFlight.

This is critical because we don’t want there to be a lack of confidence in the tools and the combination of them. We can see that it is actually very robust.

When we’re working on a proposal, the BARB BVOD Planner allows us to treat TV and VOD as part of the same video ecosystem, and not give them two different reach numbers. Until BARB offered the BVOD Planner, we simply couldn’t do this. We were very reliant for planning purposes on the IPA’s Touchpoints Channel Planner.

The real power of Touchpoints as a source for communications planners is that it’s completely cross-media, enabling the AV plan to be put into a wider context of people’s consumption of any kind of media. But when we’re focused on video and when our clients and agencies are talking about video, we are all best-placed if we can use a data-source built on the industry gold standard for broadcast video and continuously updated. That combination of pre-and-post analysis puts the broadcasters absolutely where we should be in leading the broader market for AV advertising.

At Sky, this works for us in a number of ways. One is when we’re able to identify how to add the VOD element to a campaign laydown and take it beyond natural delivery. In broadcast linear airtime, campaigns can be highly skewed towards certain channels, programming or dayparts as a certain type of viewer is targeted. The BVOD Planner demonstrates the value of incremental reach that VOD can add. We’ve used this for clients across many different categories, and it’s always a positive conversation. It allows us to plan campaigns by device and campaign reach across the Sky Media portfolio.

We often get asked about our ability to target every audience, and the BARB BVOD planner has helped us to demonstrate the value of our platforms in terms of the incremental reach they offer – for younger audiences for example. And it has been very useful too in demonstrating the potential of VOD for audiences you might not automatically think of for those sorts of campaigns.

And using CFlight to provide that post-campaign, full-circle analysis to advertisers, it reinforces perceptions of our ability as broadcasters to deliver campaigns that are deduplicated, focused on one reach outcome. We’ve long had to contend with different metrics and different viewing principles but that is now no longer an issue.

We’re in the early days of talking to advertisers and agencies about all this, so things will soon get moving quickly. Early in Q4 of this year, we’ll have the full launch of CFlight, so that media agencies and advertisers can look at the performance (for the All Adult audience) of their AV campaigns across linear and BVOD. The rollout is planned in phases across 2022 and 2023, so next year will see deduplicated reach figures available for additional audiences as well as functions like regionality.

In summary, the combination of CFlight and the BARB BVOD Planner is such a benefit to the AV ecosystem. Advertisers and agencies can build effective campaigns with much more confidence. It helps broadcasters highlight the value of premium content programming in advertising environments where brand safety is a given and where audience measurement is done with objectivity and transparency. The combination of the BARB BVOD planner with Sky’s CFlight enables advertisers to justify their spend with us, knowing how to balance their investments between linear and broadcast. And that’s a real positive.

Ruth recently spoke at the BARB Briefing event. To view the presentation, click here.
INTEGRATING BARB DATA TO OPTIMISE PLANNING

For the past 60 years, media planners have got lucky. We’ve had one major broadcast channel, capable of reaching multiple audiences, all at the same time. TV gave us a rock-solid foundation on which to construct a plan, especially in building brands in the priming stage. A single channel built emotion, created engagement and delivered visual impact, all in a neat 30” spot package.

Lots has of course changed but for me the real story is the drifting apart of audiences.

Audience fragmentation is making our jobs increasingly complicated. The inherent contradiction of 21st century complexity is that the more opportunities open up for us the more paralysed we can become. More opportunities offer more data for decisioning and yet this also requires more time to mine these data and line up the indicators for growth. Getting more data is rarely the problem, although the real meaning and consistency of such data is often debateable. We are not always gifted with a gold standard such as BARB. Lining up the indicators so they are harmonised to be comparable and then distilled down so that decisioning is fluent and without loss of context takes time.

Nowhere is this more true than in the massively expanded world of television. Addressability requires a redefinition of the purpose of reach, and the availability of AV content to ever-larger domestic TV sets and a multiplicity of smaller hand-held devices creates a massively uneven playing field.

Wavemaker has created Maximize to respond to the challenges of today’s media landscape fragmentation. It is a cloud-based and open-source platform that codifies the channel planning process enabling planners to get to the optimum budget split, flighting and phasing fast. Maximize is a single integrated tool stack that generates data-fuelled media and communications plans. This is the first global tool in our industry that optimises growth against multiple audience segments moving from traditional segment level planning to agent-based modelling.

This means rather than planning one audience at a time we can plan multiple audiences simultaneously for the priming and active stages of the purchase journey, across all online and offline touchpoints. There are three core modules which allow you to create and explore growth audiences, create brand-specific touchpoint lists, and build campaigns that will optimise the delivery of priming and active communication to your most valuable audiences.

1 We begin by creating and exploring growth audiences
No two people have the same media behaviours. Maximize allows us to move beyond the traditional socio-demo language of audiences by defining our own audiences using locally-available panel data (hello BARB). We can then explore audiences to identify salient traits compared to others, or compared to the total population. Excitingly the plans we produce can be optimised towards more than one audience segment.

2 We then add granularity and detail to the touchpoints
Every advertiser uses media differently so we make the system bespoke for every one of our clients by creating brand, advertiser or market specific touchpoint lists. At the Touchpoints stage we establish the parameters for campaign success accounting for nuances of brand and category, while balancing priming and active stage tasks.

We then define and optimise our campaign plan
Our AI planning engine models thousands of scenarios optimised for influence across multiple audiences. Sophisticated plans, focused on growth are built in minutes which optimise budget allocation across touchpoints and audiences and which are flighted to deliver campaign objectives.

It doesn’t produce the final plan, but it gets us 60% of the way there. From here our plans are fine-tuned to add real life elements and experience and create the perfect plan.

Why is this amazing?
Let’s bring this to life with a real example.

Back in July 2020, Nationwide challenged us with a simple but powerful provocation: “are we truly speaking to all of UK society, nationwide”? As a brand whose proposition is to help build society it is essential they actively include diverse audiences.

Our planners use human insight, ingenuity and creativity to create the very best plan, identify the very best partners and apply their media planning craft skills and tactics to give our clients the edge. Maximize is an example of using machines to do what machines do best, freeing up our planners to do the things that humans do best.

Emma recently spoke at the BARB Briefing event. To view the presentation, click here.

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Emma recently spoke at the BARB Briefing event. To view the presentation, click here.
BARB’s website has been refreshed and a new portal built for subscribers. You can log in from the main website using your existing login credentials and will be taken to the new What People Watch portal, where you will find access to data and reports only available to BARB subscribers.

Click on the What People Watch to log in to the new subscriber portal.

Side bar with main menu as well as news and views and BARB Explained articles.

Carousel with the latest news and views.

Dedicated sections for Broadcasters, Advertisers and Streamers with the latest interactive, downloadable reports.

The most-viewed programmes and the Viewing Report are accessible for non-subscribers.

Click on insights to read ad-hoc articles in addition to the Viewing Report.
THE TOP TENS OF 2020

Our popular listings of the most watched programmes of the previous year have been in a centrefold pull-out in previous years. In this year’s digital-only publication the top tens of 2020 are featured over the next three pages.

THE TOP TENS OF 2020

1. Prime Ministerial Statement
   BBC One 15/05/2020
   18.99 millions (avg)

MOST WATCHED 2020

1. BBC News Special
   BBC One 25/12/2020
   14.62

2. Ant and Dec’s Saturday Night Takeaway
   ITV 25/12/2020
   10.67

3. I’m a Celebrity... Get Me Out of Here!
   ITV 12/01/2020
   18.99

4. The Salisbury Poisonings
   BBC One 14/06/2020
   10.35

5. Strictly Come Dancing
   BBC One 25/12/2020
   11.74

6. The Great British Bake Off
   Channel 4 26/11/2020
   10.98

7. Britain’s Got Talent
   ITV 11/04/2020
   10.98

TOP 10 CHRISTMAS DAY

1. Call the Midwife
   BBC One 25/12/2020
   8.19 millions (avg)

2. The Queen
   BBC One 25/12/2020
   7.29

3. Strictly Come Dancing
   BBC One 25/12/2020
   6.77

4. Coronation Street
   ITV 25/12/2020
   5.64

5. Blankety Blank
   Christmas Special
   BBC One 25/12/2020
   3.30

6. Emmerdale
   ITV 25/12/2020
   3.94

7. Mrs Brown’s Boys
   BBC One 25/12/2020
   3.60

TOP 10 DRAMAS

1. The Salisbury Poisonings
   BBC One 14/06/2020
   10.35 millions (avg)

2. Des
   ITV 14/09/2020
   9.05

3. Quiz
   ITV 04/04/2020
   9.05

4. Call the Midwife
   BBC One 17/10/2020
   8.80

5. White House Farm
   ITV 12/02/2020
   8.87

6. Silent Witness
   BBC One 07/01/2020
   8.15

7. Coronation Street
   ITV 25/11/2020
   8.16

8. Death in Paradise
   BBC One 09/01/2020
   7.82

9. Vera
   ITV 12/01/2020
   7.62

10. EastEnders
    BBC One 07/01/2020
    7.31

TOP 10 FACTUAL

1. Bradley & Barney Walsh: Breaking Dad
   ITV 15/01/2020
   4.36

2. Long Lost Family
   DNA without Trace
   ITV 02/02/2020
   5.72

3. Who Do You Think You Are?
   BBC One 19/10/2020
   5.36

4. Anne: The Princess Royal at 70
   ITV 29/01/2020
   5.84 millions (avg)

5. Bradley Walsh: Happy 60th Birthday
   ITV 03/02/2020
   4.07

6. Happy New Year Live!
   ITV 01/01/2020
   4.14

7. The Salisbury Poisonings
   Channel 4 14/06/2020
   3.56

8. I’m a Celebrity... Get Me Out of Here!
   ITV 12/01/2020
   3.56

9. The FA Cup: Manchester United v Manchester City
   03/04/2020
   3.65

10. Match of the Day Live - Southampton v Manchester City
    BBC One 01/07/2020
    3.60

TOP 10 FILMS

1. Darkest Hour
   BBC One 23/12/2020
   5.37 millions (avg)

2. Indiana Jones and the Kingdom of the Crystal Skull
   BBC One 13/04/2020
   4.27

3. Grease
   BBC One 26/12/2020
   4.17

4. The Greatest Showman
   Channel 4 18/10/2020
   3.56

5. Indiana Jones and the Temple of Doom
   BBC One 14/06/2020
   3.51

6. Jurassic World: Fallen Kingdom
   ITV 07/06/2020
   3.70

7. FilM: Toy Story 4
   Sky Cinema Premiere 14/02/2020
   3.66

8. Spider-Man: Homecoming
   BBC One 22/12/2020
   3.65

9. Raiders of the Lost Ark
   BBC One 10/04/2020
   3.63

10. Love Island
    ITV 12/05/2020
    4.84 millions (avg)

TOP 10 SPORT

1. Match of the Day Live - Manchester United v Manchester City
   BBC One 01/07/2020
   4.07

2. International Football - England v Wales
   ITV 06/10/2020
   4.02

3. Sport Relief
   BBC One 13/03/2020
   3.21

4. Match of the Day 2
   BBC One 04/10/2020
   3.68

5. Snooker: World Championship
   Channel 4 14/08/2020
   3.18

6. Premier League - Tottenham Hotspur v Manchester United
   Sky Sports Main Event 27/12/2020
   2.70

7. The Virtual Grand National
   Sky Sports Main Event 17/04/2020
   2.46

8. The Long Lost Family
   Channel 4 04/10/2020
   2.10

9. Who Do You Think You Are?
   BBC One 19/10/2020
   1.99

10. The Salisbury Poisonings
    Channel 4 14/06/2020
    1.99

TOP 10 MULTICHANNEL

1. FilM: Star Wars: Episode VIII
   Sky Cinema Premiere 21/12/2020
   3.66

2. FilM: Star Wars: Episode IX
   Sky Cinema Premiere 20/12/2020
   2.92

3. The Virtual Grand National
   Sky Sports Main Event 13/09/2020
   2.46

4. Love Island
   ITV 12/05/2020
   4.84 millions (avg)

5. BBC News Special
   BBC One 23/09/2020
   3.68

6. The Great Pottery Throw Down
   More4 13/03/2020
   2.56

7. The Real ‘Des’: The Dennis Nilsen Story
   ITV 17/09/2020
   2.46

8. Bradley Walsh: Happy 60th Birthday
   Dave 03/02/2020
   1.72

9. FilM: Frozen 2
   Sky Cinema Premiere 03/07/2020
   1.61

10. FilM: Frozen 2
    Sky Cinema Premiere 03/07/2020
    1.61
Programmes of 5+ minutes duration are included, with only the top programme per programme title listed, with the exception of sport.

BARB’s 7-day consolidated data, apart from pre-broadcast and post-broadcast tables. The post-broadcast table includes viewing up to 28 days after linear transmission.

All tables are four-screen totals, except for Children 4-15 and Adults 16-24 (three-screen totals). All viewing figures include HD and +1 channels where relevant and are channel portfolio as of 31/12/19.

*Includes all Sky channels and the NBCUniversal portfolio of channels, all under Comcast ownership.

Source: BARB. Based on Total Three-Screen Viewing for Individuals 4+. All channels include HD and/or +1 variants where applicable. Broadcaster groups defined based on channel portfolio as of 31/12/2020.

### TOP TEN BROADCASTER SHARE BY BROADCASTER

<table>
<thead>
<tr>
<th>Broadcaster</th>
<th>% Share of Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC One</td>
<td>16.4%</td>
</tr>
<tr>
<td>BBC Two</td>
<td>7.0%</td>
</tr>
<tr>
<td>BBC News</td>
<td>3.1%</td>
</tr>
<tr>
<td>Others</td>
<td>4.2%</td>
</tr>
<tr>
<td>Discovery</td>
<td>4.8%</td>
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<tr>
<td>Quest</td>
<td>0.1%</td>
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<tr>
<td>Really</td>
<td>0.7%</td>
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<tr>
<td>Quest Red</td>
<td>0.6%</td>
</tr>
<tr>
<td>Others</td>
<td>2.3%</td>
</tr>
<tr>
<td>ITV</td>
<td>4.5%</td>
</tr>
<tr>
<td>Drama</td>
<td>1.4%</td>
</tr>
<tr>
<td>Dave</td>
<td>1.1%</td>
</tr>
<tr>
<td>Yesterday</td>
<td>0.7%</td>
</tr>
<tr>
<td>Others</td>
<td>1.4%</td>
</tr>
<tr>
<td>Sky News</td>
<td>2.0%</td>
</tr>
<tr>
<td>Sony Movies</td>
<td>3.3%</td>
</tr>
<tr>
<td>Sony Movies Action</td>
<td>1.8%</td>
</tr>
<tr>
<td>Others</td>
<td>0.8%</td>
</tr>
<tr>
<td>Channel 4</td>
<td>10.2%</td>
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<tr>
<td>E4</td>
<td>3.3%</td>
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<tr>
<td>Film4</td>
<td>3.3%</td>
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<tr>
<td>Others</td>
<td>2.0%</td>
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<tr>
<td>sky movies</td>
<td>6.8%</td>
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<tr>
<td>BLAZE</td>
<td>0.8%</td>
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<tr>
<td>Sony Movies Action</td>
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<tr>
<td>Others</td>
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<tr>
<td>A+E</td>
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<tr>
<td>BLAZE</td>
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</tr>
<tr>
<td>Sony Movies Action</td>
<td>0.8%</td>
</tr>
<tr>
<td>Others</td>
<td>0.8%</td>
</tr>
<tr>
<td>ViacomCBS</td>
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<tr>
<td>Channel 5</td>
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<tr>
<td>USA</td>
<td>0.8%</td>
</tr>
<tr>
<td>SSL</td>
<td>0.7%</td>
</tr>
<tr>
<td>Others</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

*Includes all Sky channels and the NBCUniversal portfolio of channels, all under Comcast ownership.