

**FIRST LOOK:
ONLINE TV
VIEWING
PATTERNS
REVEALED**

November 2017

Whether it's Blue Planet II on BBC iPlayer or Love Island on the ITV Hub, watching television on your computer device (PC, tablet or smartphone) is now an established method of viewing for audiences across the UK. Broadband homes make up over 85% of the UK household population, and the majority of those have a computer device from which it is possible to watch one of the many available broadcaster player applications. In fact, BARB's TV Player Report shows that over one billion minutes of television are viewed on PCs, tablets and smartphones in the UK every week. That equates to between 1-1.5% of additional television viewing, on top of the traditional consolidated 7-day TV viewing.

But what the TV Player Report does not tell us is exactly who is doing this online TV viewing; from next March, BARB will report data on just that. This is the outcome of Project Dovetail, which will use BARB's people-based panel data to provide demographic context for the device-based census data that we capture from the UK population at large; the latter is reported in the TV Player Report.

Ahead of the launch of our cross-platform viewing data, we can share for the first time some findings from the BARB panel on just who it is that is viewing via PCs and tablets (we don't yet record viewing via smartphones for the BARB panel). All of these data are taken from September 2017.

ONLINE TV VIEWING BY AGE



1 AGE PROFILE – ALL VIEWING

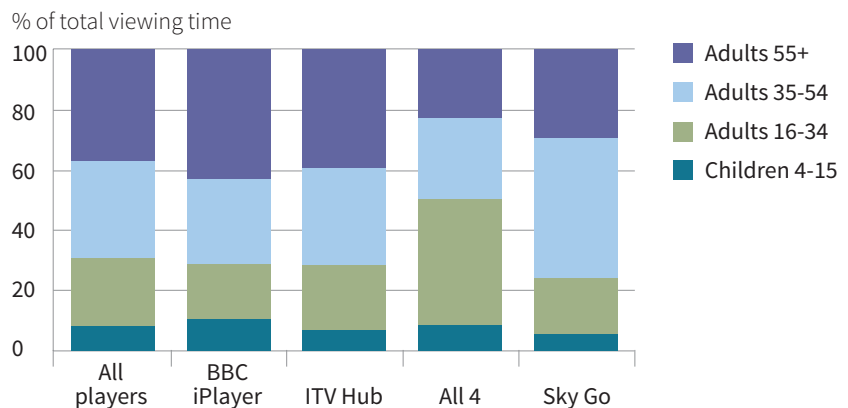


Chart 1 outlines the age profile for total viewing time to BARB-measured TV player apps via PCs and tablets this past September. This includes breaks for those players where measurement has been enabled across the iOS, Android and PC browser platforms.

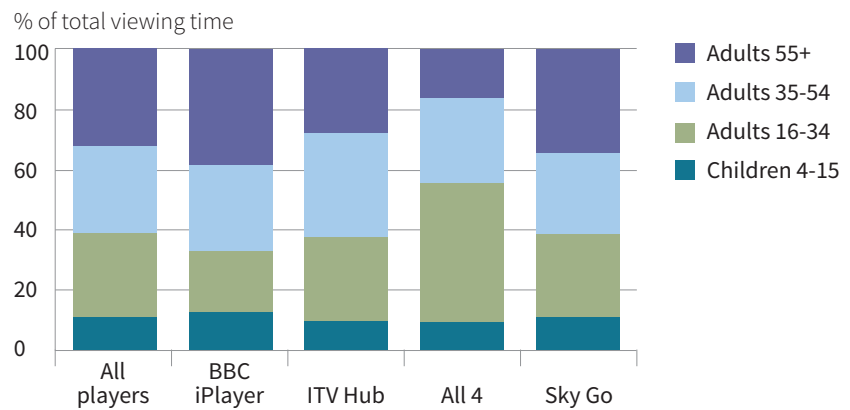
This chart shows that for all viewing via computer devices, 22% comes from 16-34-year-olds who, it is worth remembering, only account for 15% of all TV set viewing. However, for All 4, this figure rises to 42% of all viewing, highlighting the demographic differences between the online players. >>

Data source:
BARB panel, PCs & tablets
– September 2017

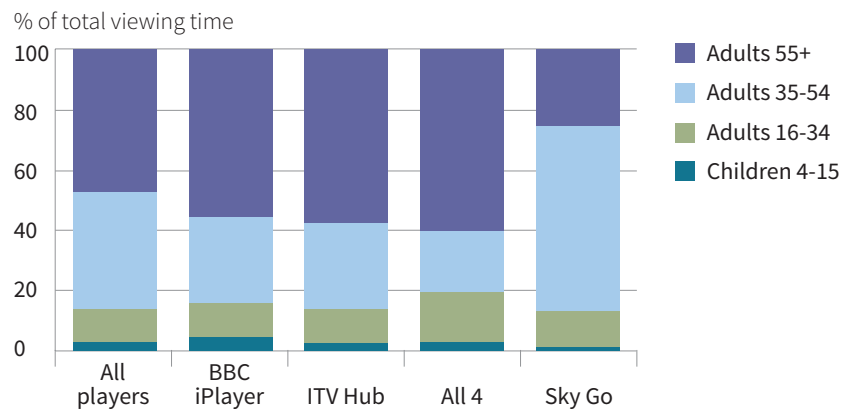
FOR ALL VIEWING VIA COMPUTER DEVICES, 22% COMES FROM 16-34-YEAR-OLDS WHO, IT IS WORTH REMEMBERING, ONLY ACCOUNT FOR 15% OF ALL TV SET VIEWING



2 AGE PROFILE – ON DEMAND



3 AGE PROFILE – LIVE STREAMING



OLDER PEOPLE ARE MORE LIKELY TO WATCH PROGRAMMING LIVE, WHILE YOUNGER AUDIENCES ARE HAPPY TO CATCH UP AT A LATER TIME

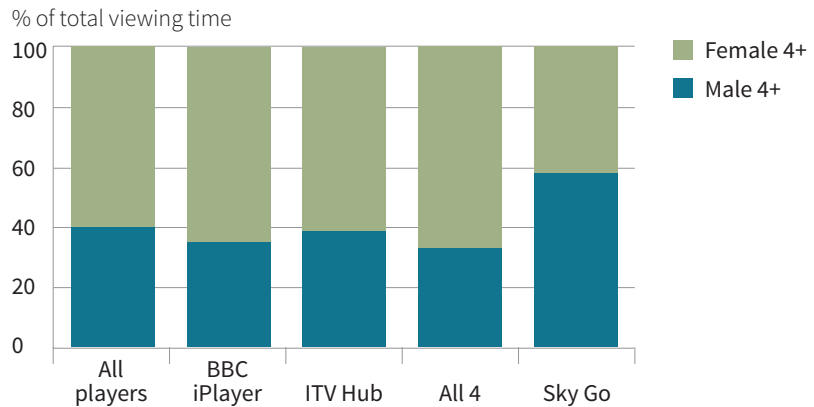
Age profiles also shift significantly when viewing is itemised by on-demand or live streaming (charts 2 and 3). Just under 40% of all on-demand viewing activity in September was from people aged under 35, whereas only 14% of live streaming across the month was from this age group. Sky Go, the largest of the players for live streaming, indexes strongly in favour of 35-54-year-olds, who contributed 62% of all live streaming in the month.

These data highlight how different age groups view programming on the online players. Older people are more likely to watch programming live, while younger audiences are happy to catch up at a later time; this may be a reflection of competing demands for media time. >>

ONLINE TV VIEWING BY GENDER



4 GENDER PROFILE – ALL VIEWING

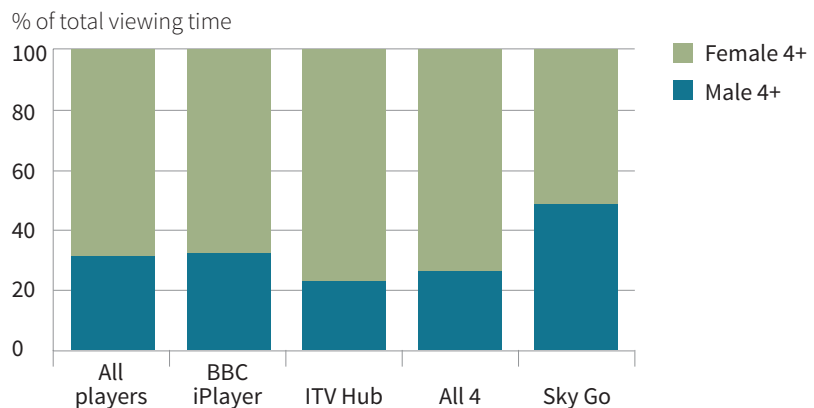


ACROSS SEPTEMBER, 60% OF VIEWING TO BROADCASTER PLAYER APPS WAS FROM FEMALES

Age is not the only discriminator when it comes to online TV viewing via devices. Gender also plays a part, and it's the female of the species that dominates online TV viewing, just as on the TV set (chart 4). Across September, 60% of viewing to broadcaster player apps was from females. This trend is largely consistent across players apart from Sky Go, which actually has a male skew with a 58% male profile; this isn't too surprising when you consider the high level of sports content on this platform.



5 GENDER PROFILE – ON DEMAND



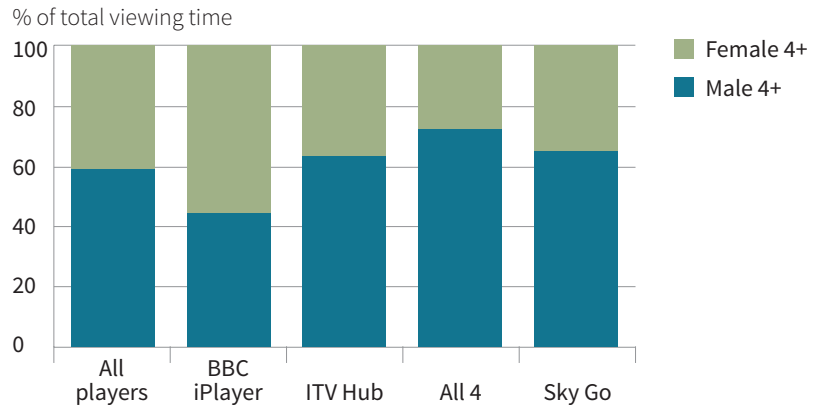
ON-DEMAND VIEWING THROUGH TV PLAYER APPS WAS LARGELY DRIVEN BY FEMALES. BUT FOR LIVE STREAMING, IT IS MALES WHO DOMINATE

As with age, the shifts by type of viewing are stark (charts 5 and 6). On-demand viewing through TV player apps was largely driven by females, who accounted for 69% in the month. But for live streaming, the profiles shift, and it is males who dominate with 59% of all live streaming. >>

However, these trends do not manifest across all players. For BBC iPlayer, female viewing dominates both on-demand and live streaming, while for Sky Go, 49% of on-demand viewing is male. So, profiles differ significantly within players, and not only at a total level but in the type of viewing too.



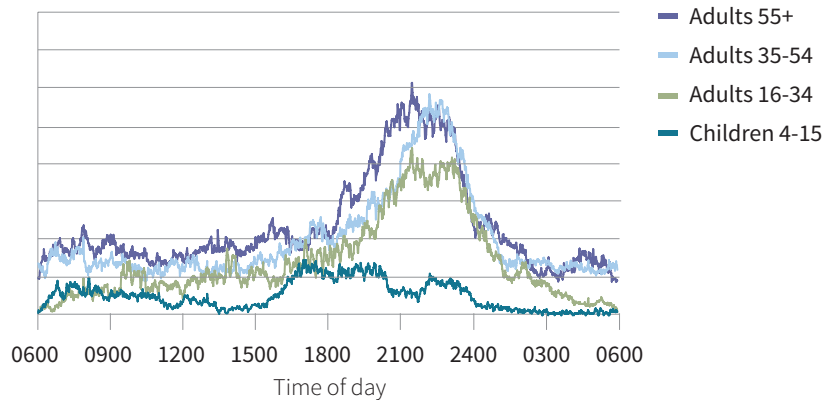
6 GENDER PROFILE – LIVE STREAMING



ONLINE TV VIEWING BY TIME OF DAY



7 ONLINE TV THROUGHOUT THE DAY



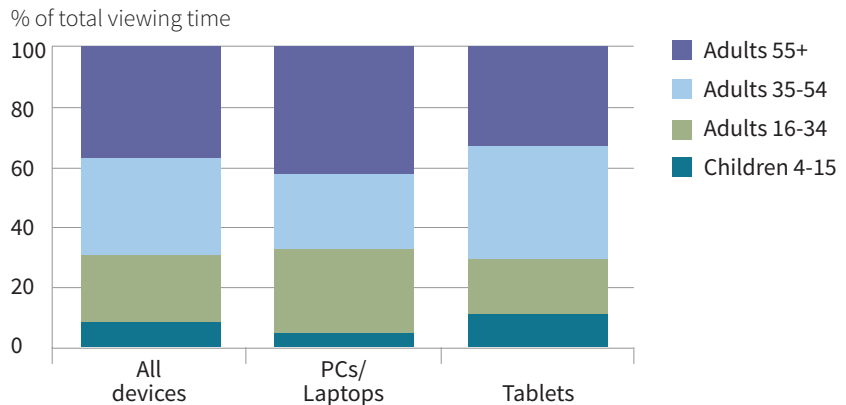
As with traditional TV set viewing, when we watch on PCs and tablets differs depending on who we are (chart 7). Children’s viewing on devices understandably peaks in after-school hours, before decreasing as the evening wears on. That said, there is a bump in viewing at around 10pm, a possible indicator of surreptitious bedroom viewing after ‘lights out’.

Adults aged 55+ appear to follow the traditional TV set viewing curve with device viewing peaking around 9pm, whereas for 16-34s and 35-54s, peak viewing is an hour later, before tailing off from 11.30pm onwards. ➤

ONLINE TV VIEWING BY TYPE OF DEVICE



8 PROFILE BY DEVICE



YOUNG ADULTS AGED 16-34 ARE MORE LIKELY TO USE THEIR PC OR LAPTOP TO WATCH TELEVISION THAN THEIR TABLET. OLDER ADULTS 35-54 PREFER TABLETS

The device on which we choose to watch television matters, and each age group has its own preferences (chart 8). This might be due to the size or availability of the screen, but one size certainly does not fit all. Young adults aged 16-34 are more likely to use their PC or laptop to watch television than their tablet. This makes sense on the basis that 16-34-year-olds are, for the first time, taking ownership of a laptop for study and/or work. On the reverse side, older adults 35-54 prefer tablets; this is likely to be because of their convenience and the fact that they are an antidote to spending even more time in front of a PC. Children also prefer watching on tablets, with many parents using these devices to entertain their children.

ADDITIONAL WEEKLY REACH

From the census data in BARB’s TV Player Report, we know that the amount of time spent viewing via PCs and tablets adds just over 1% to the consolidated 7-day TV viewing in a week. This clearly suggests that while these devices offer additional opportunities for viewing, they’re not an alternative to the big screen for most of us.

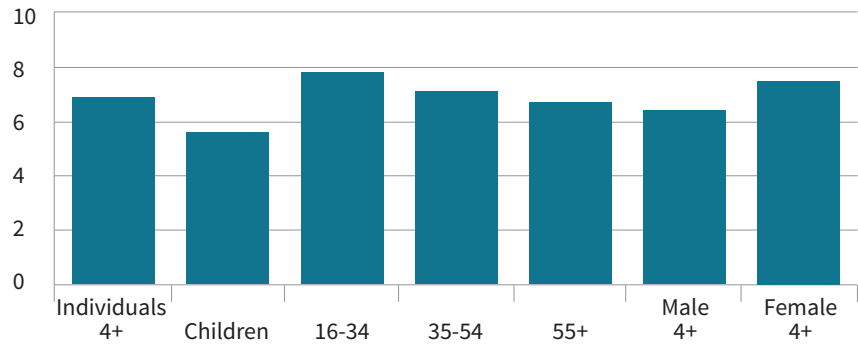
But just how many of us actually watch on these devices?

At this point we need to highlight that our analysis of viewing on PCs and tablets includes homes that have broadband, but no TV. In other words, we are including non-TV homes in the base. This is an important consideration given that the industry is used to calculating weekly reach as a percentage of the TV homes universe. So, readers should bear in mind that a lower weekly reach percentage doesn’t mean there are fewer viewers. ➡



9 WEEKLY REACH % – PCS/LAPTOPS & TABLETS

% of weekly reach



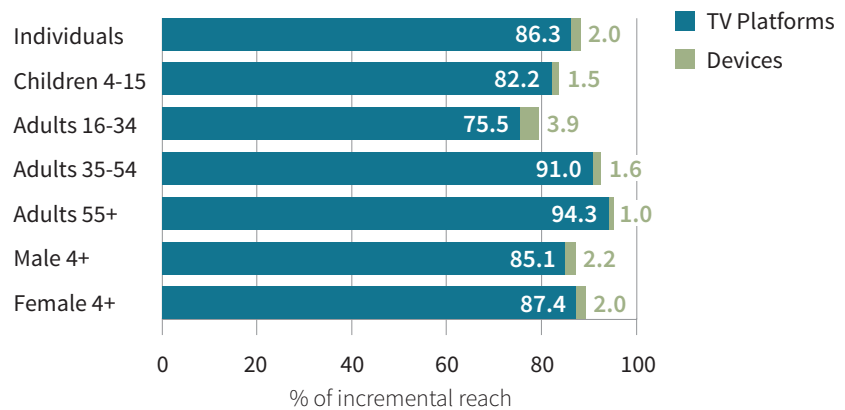
WEEKLY REACH IS HIGHEST AMONG 16-34-YEAR-OLDS AT 7.8%

In BARB panel data from September, viewing to PCs and tablets achieved an average weekly reach of around 7% (chart 9). The picture varies by demography, with just 5.6% of children aged 4-15 watching during the course of a week. Weekly reach is highest among 16-34-year-olds at 7.8%.

Are these new viewers to television in the week, or just the same viewers taking advantage of another device to catch their favourite programming? BARB panel data can identify just how many viewers are added to TV reach with the inclusion of these devices (chart 10). And it's not insignificant.



10 TV REACH AND INCREMENTAL REACH VIA DEVICES – WEEKLY %



ACROSS ALL INDIVIDUALS, VIEWING ON PCS AND TABLETS DELIVERS INCREMENTAL REACH OF 2% ON TV SET VIEWING IN THE WEEK

Across all individuals, including those without a TV set, viewing on PCs and tablets delivers incremental reach of 2% on TV set viewing in the week. As you might expect, this differs by age group, with 16-34s adding nearly 4% to their weekly reach totals. For children aged 4-15, computer device viewing delivers incremental reach of 1.5%, while there is a similar uplift (1.6%) for adults aged 35-54.

These are just a few highlights of what is to come in March 2018, when the launch of Dovetail Fusion will see BARB report programme audience levels across PCs, tablets and TV sets for the first time. 🏠