

FACTSHEET 4

Consumption of broadcast TV

Oxford Media Convention March 2017



This factsheet has been compiled by Ofcom and provides some background information to aid discussion at the 2017 Oxford Media Convention. It explores consumption of broadcast TV, drawing on BARB* viewing data. Consumption of Video on Demand is covered in a separate factsheet.

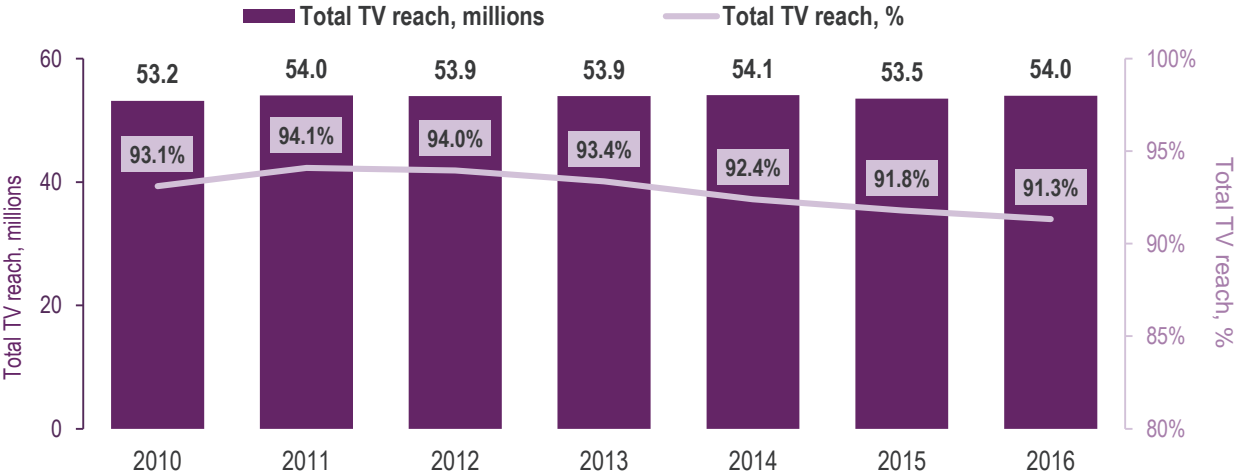
* BARB (Broadcasters' Audience Research Board) measures all scheduled TV content viewed on TV sets, including recordings and catch-up viewing to those programmes up to seven days after broadcast.

Key points

The following pages present TV viewing data drawn from the Broadcasters' Audience Research Board (BARB).

The proportion of TV individuals aged 4+ in the UK who tuned in to broadcast TV in a typical week dipped by 0.5pp between 2015 and 2016, but remained high at 9 in 10 people (Figure 1).

Figure 1: Average weekly reach, total TV: 2010-2016



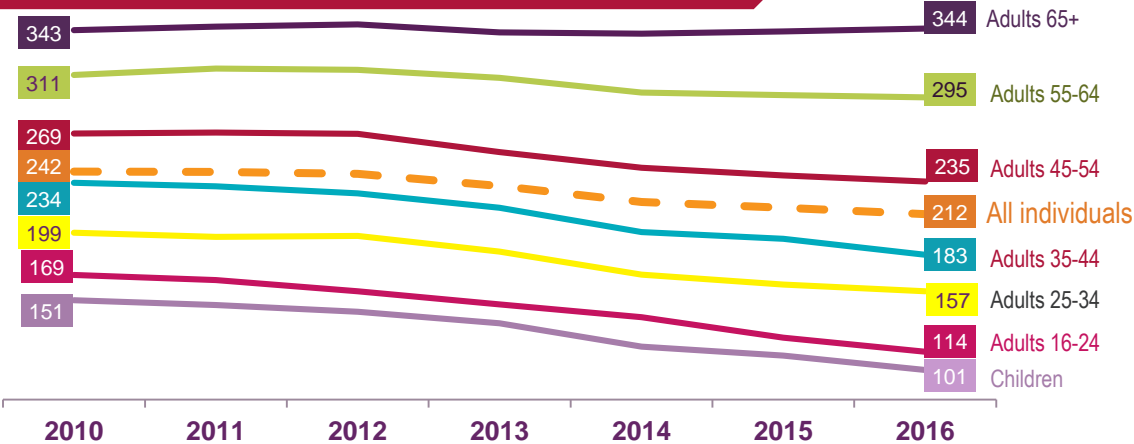
Source: BARB, Individuals 4+, Network. Reach criteria = 15 consecutive minutes of viewing, full weeks used per year

Key points

In 2016, time spent viewing traditional broadcast TV on a TV set was 3 hours 32 minutes per person (aged 4+) per day, on average (Figure 2). It is a 4 minute decline (-2%) from 2015, which continues the pattern of decline seen since 2011. However, this is slower than the rate of decline seen previously.

Since 2011 viewing has fallen across all age groups, except for those aged 65+ where it has remained fairly stable. The decline in viewing has been greatest, proportionally, among adults 16-24 and children aged 4-15 (by around a third). In 2016 the rate of decline year-on-year for adults 16-24 slowed slightly (-8.4%) compared to 2015 (-10.5%). However, the proportional decline for children increased; -8.8% in 2016 compared to -5.4% in 2015.

Figure 2: Average minutes of daily viewing, total TV: 2010-2016

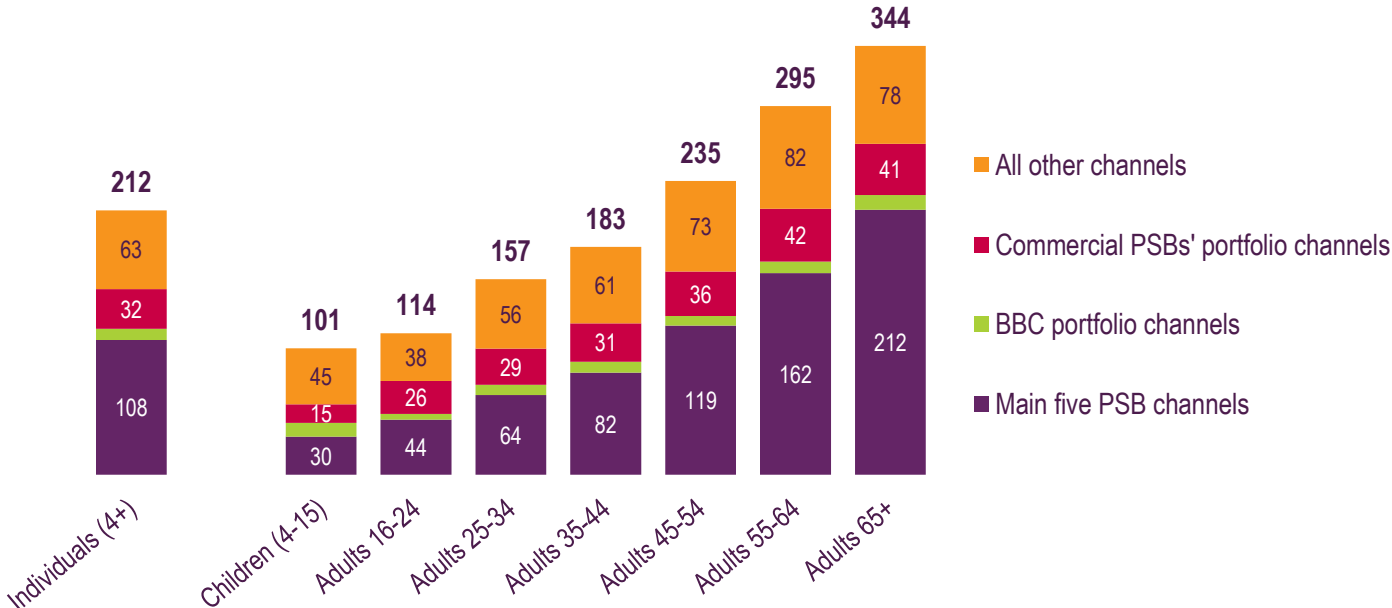


Source: BARB, Network.

Key points

Like viewing to all TV, time spent viewing the main PSB channels increases with age, with adults aged 65+ watching an average of 212 minutes per day of the main five PSB channels compared to 44 minutes amongst 16-24 year olds.

Figure 3: Average minutes of daily viewing by channel group, total TV: 2016

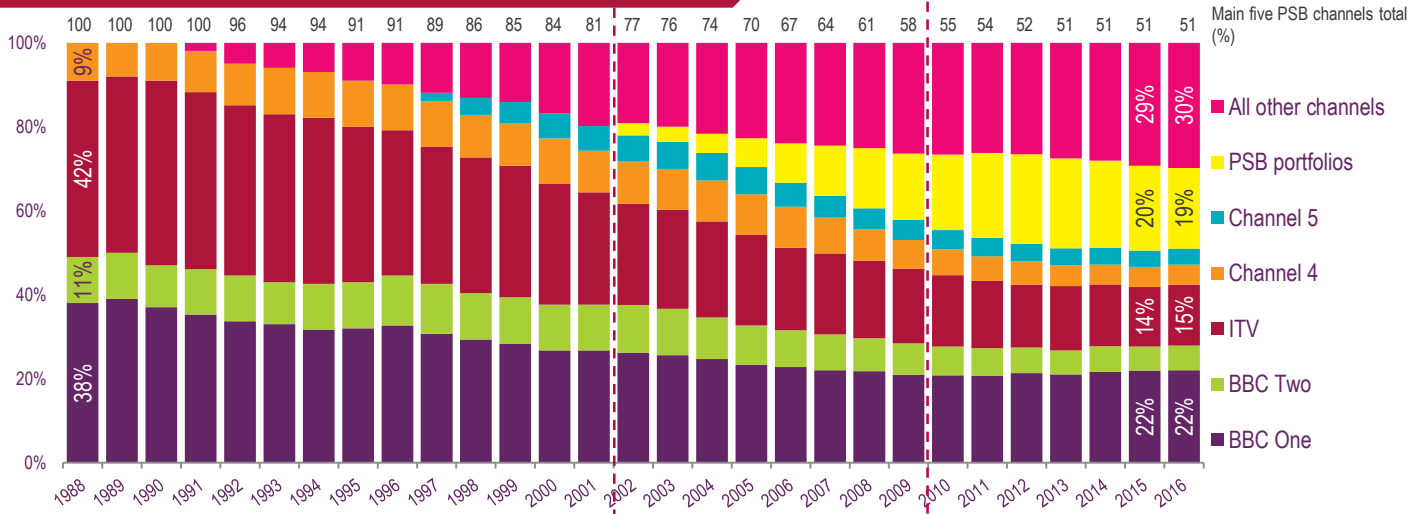


Source: BARB. Network. 2016

Key points

Over the long term, the main five PSB channels have each seen steady falls in share since the establishment and growth of cable and satellite TV in the early 1990s, and as digital switchover took place at the end of 2012 (Figure 4). Yet despite increased channel choice, they continue to maintain half of total broadcast TV viewing (51% in 2016). When their portfolio of channels are taken into account, the share of the PSB family of channels rises to over two-thirds (70% in 2016).

Figure 4: All day channel shares, all individuals: 1988-2016

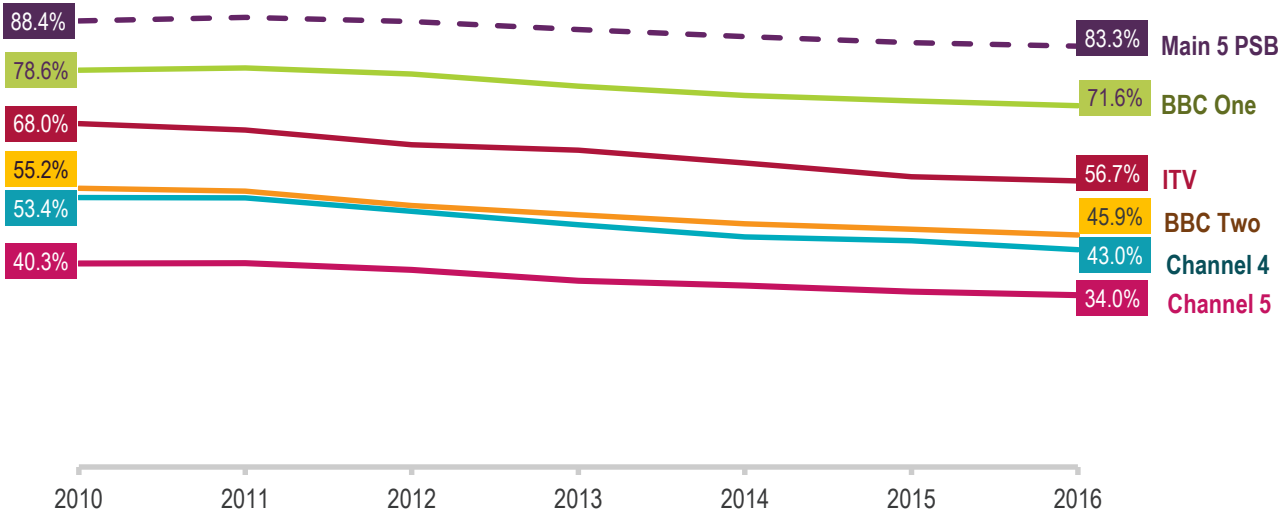


Source: BARB, TAM JICTAR and Ofcom estimates, individuals (4+). Network. New BARB panels introduced in 2002 and 2010, as a result, pre- and post-panel change data must be compared with caution (see dotted lines). The main five PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Key points

The proportion of the TV population who watch each individual main PSB channel in a typical week has fallen over the long term, but the PSBs' combined reach remains high at 83.3% in 2016 (Figure 5).

Figure 5: Average weekly reach of the main PSB channels, all individuals: 2010-2016



Source: BARB. All individuals (4+), Network. Reach criteria: 15 consecutive minutes, full weeks used.

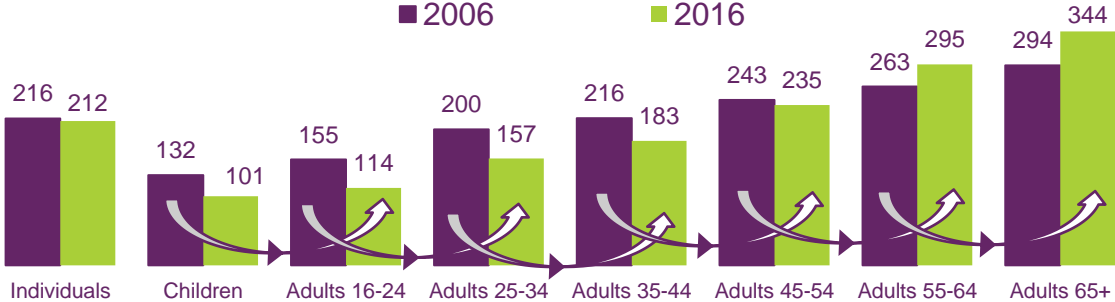
Key points

Compared to a decade ago, the time spent watching broadcast TV by the average individual remained broadly stable. However, age groups under 55 years old were watching less TV in 2016 than the same groups were in 2006 (Figure 6). The comparative drops in viewing is particularly pronounced among 16-24s, children (4-15) and 25-34 year olds.

The arrows illustrate how the viewing behaviour of each age group changes as they move into the next age bracket*. While viewing among 16-24s increases slightly as they become 25-34s, the opposite is true of children as they become 16-24 year olds and 25-34 year olds as they become 35-44 year olds. From 35 years old, viewing increases significantly as people age.

This suggests that the drivers of viewing are complex and multi-layered and that a mix of cohort (people taking their young viewing habits with them), life stage (people watching more TV as they get older) as well as technological and social influences are at play.

Figure 6: Average weekly reach, total TV: 2006-2016



Source: BARB, Network. New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.
*This analysis is not based on tracking the viewing habits of the same people but gives an indication of shifting viewing behaviours.