



# Digital Day 2016 Overview of findings

Research Document

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# About this document

This document provides an overview of the core results from our 2016 Digital Day study, drawing comparisons with data from the previous study in 2014. It has also been published as a section within Ofcom's Communications Market Report (CMR) 2016.

Further material in support of this document can also be accessed online:

- The charts displayed in this document:

[http://stakeholders.ofcom.org.uk/binaries/research/cross-media/2016/Digital\\_Day\\_2016\\_Overview\\_of\\_findings\\_charts.pdf](http://stakeholders.ofcom.org.uk/binaries/research/cross-media/2016/Digital_Day_2016_Overview_of_findings_charts.pdf)

- A detailed technical appendix, outlining the approach and analysis definitions:

[http://stakeholders.ofcom.org.uk/binaries/research/cross-media/2016/technical\\_appendix.pdf](http://stakeholders.ofcom.org.uk/binaries/research/cross-media/2016/technical_appendix.pdf)

- An interactive micro-site that enables you to select pre-built PowerPoint slides, and apply a range of filters to them. It also allows you to download full pre-created chart decks where filters (e.g. adults 16+ or children aged 6-15) have already been applied.

[www.digitaldayresearch.co.uk](http://www.digitaldayresearch.co.uk).



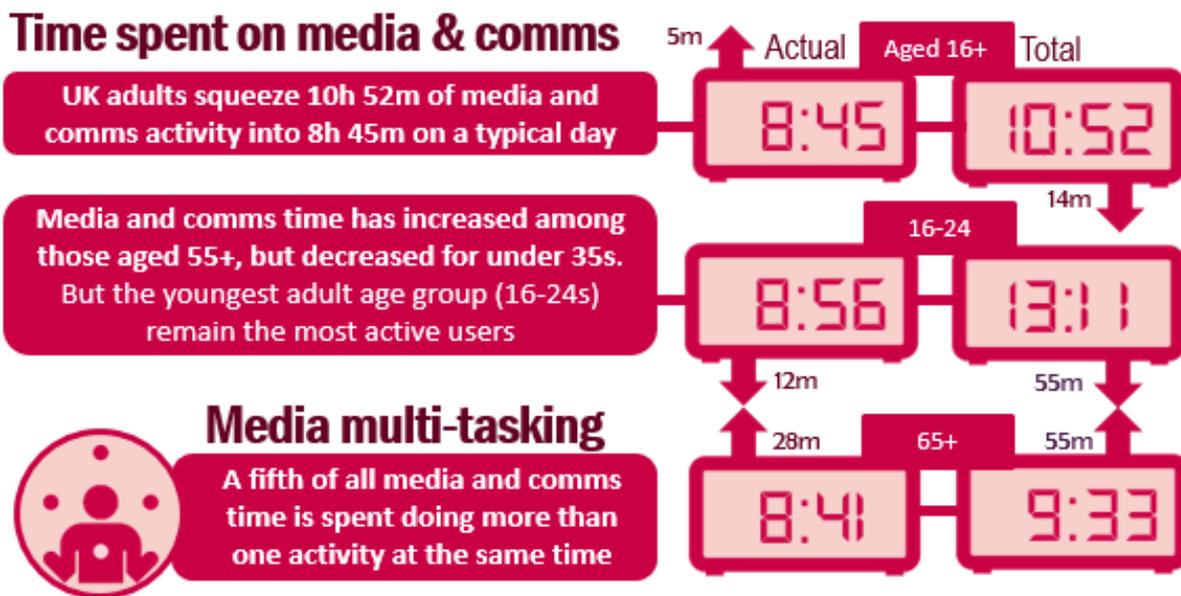
# 1.1 The Digital Day

## 1.1.1 Key findings

Our Digital Day research shows that we are spending more time on media and communications than on sleeping. The average UK adult uses media and communications services for 8 hours 45 minutes, and sleeps for 8 hours 18 minutes.

Overall, the amount of time spent on media and communications (8h 45m) has remained stable since 2014, but this does mask some generational shifts. Those aged 65+ have increased their time by 28 minutes to 8 hours 41 minutes. For younger people the time has fallen, with 16-24s spending 12 fewer minutes on media and communication. These shifts are explained in part by live TV viewing – with the younger age groups watching less of it and older people watching more.

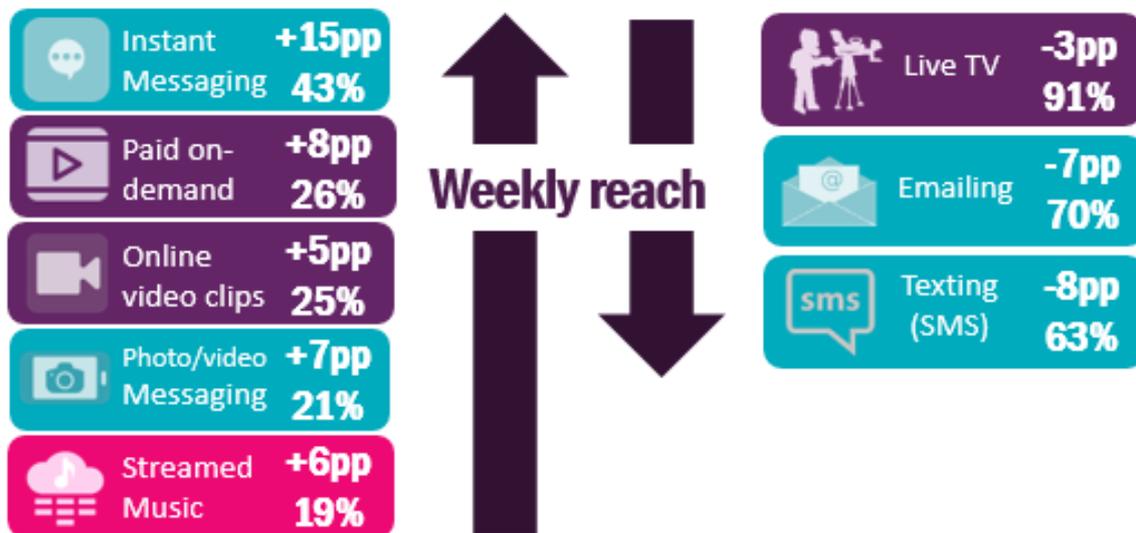
Engaging with two or more media or communications activities at the same time is still popular. Thanks to media multitasking, UK adults are squeezing 10 hours 52 minutes' worth of media and communications activity into the 8 hours 45 minutes of time actually spent over a typical day. This remains close to the 2014 findings: 11 hours 6 mins squeezed into 8 hours 40 mins each day.



Compared to 2014, many people in the UK are now even better connected, through superfast broadband and 4G mobile. Because of this, the communications and media habits of adults of all ages are shifting, as people embrace newer on-demand and online services, and take advantage of their smartphones and tablets to stay connected.

There have been some key shifts in the services that people are using, including watching TV programmes, listening to audio, and communicating with each other. Instant messaging (IM) has become increasingly popular; the proportion of people using IM services such as WhatsApp is up from 28% to 43%, and photo/ video messaging (MMS) has risen to more than a fifth of adults in a given week. This increase is at the expense of SMS text messaging and emailing; both of these are declining. The popularity of paid on-demand services such as Netflix and Amazon Instant Video has grown (from 18% to 26% weekly reach) as has the proportion of people watching video clips online (20% to 25%), while the proportion of people watching live TV has declined (albeit still reaching more than nine in ten people each week).

And while the proportion of people listening to live radio and making phone calls has remained the same since 2014, the proportion of people who are using newer online services like streaming audio and video calls has grown.

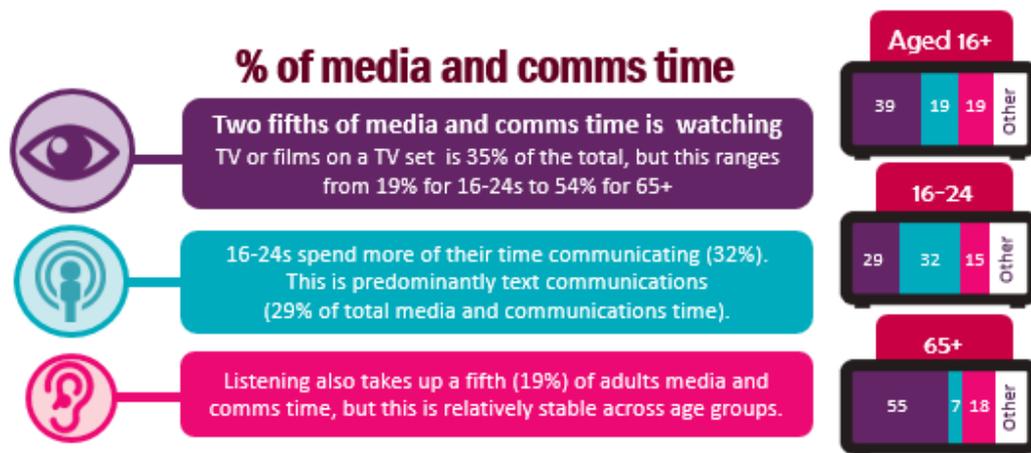


16-24 year olds are more likely to embrace these newer on-demand and online services. Today, instant messaging is more important to this age group than any other means of communication, and playing video games is seen as being as important as watching live, recorded or paid-for on-demand TV. However, for older adults, watching live TV remains the most important media activity.

Despite this older people are increasingly exploiting digital communications technology. Although they tend to use more established services such as linear TV, SMS or email, many are also embracing social media or on-demand services (among 55-64s, 51% use the former and 42% the latter in an average week).

Smartphones are playing an increasingly important role in keeping many of us connected throughout the day. Seventy-one per cent of UK adults now have one, up from 61% in 2014. Moreover, over two hours a day is spent using them, rising to nearly five hours for 16-24s.

While the relative popularity of different media and communications services has changed in two years, with a shift to on-demand and online services, the Digital Day research also highlights many areas unchanged since 2014. For example, watching audio-visual content still has the largest share of our total time spent on media and communications consumption, and live TV continues to represent the lion's share, despite recent declines.



### 1.1.2 Introduction

While Ofcom makes use of a wide range of industry research, to understand how people consume broadcast media and online content, this research generally provides limited insight into how people use all media and communications services and devices together, and how they form a central part of a consumer's day.

In Q1 2016 we conducted an in-depth quantitative diary study into UK adults' and children's<sup>1</sup> total media and communications activities, to provide an overview of the role of media and communications in people's lives. The study was last conducted in 2014, and so one of the primary objectives was to gauge how things have changed since then; the study was therefore designed to remain as consistent as possible in terms of methodology.

The research provides a snapshot of media and communications behaviour over a seven-day period, exploring when and how people use services and devices throughout the day, covering both personal and work/study use; in and away from home.

Adult participants recorded all their media and communications activities in a paper diary booklet for seven days, and this was transferred digitally on a daily basis using a dedicated website (completed by the respondent or with the help of a telephone interview)<sup>2</sup>:

### 1.1.3 Comparisons with industry data

As in the 2014 study, television industry data from BARB show weekly reach levels and volumes of activity comparable with this study. However, this study recorded lower reach and volumes than industry data for radio (comparing Digital Day results to the RAJAR database). A range of factors may have contributed to this difference. These include:

- The broad nature of the Digital Day survey; it covers a wide range of media, rather than focusing on one specific medium.
- Activities that receive lower consumer attention, or are undertaken passively, such as radio, may be less likely to be recalled.

These factors may explain differences between the two data sources.

<sup>1</sup> Within this report we focus on the data from the adults' diaries only. We plan to publish a separate children's report later on in the year alongside our children's media literacy annual report.

<sup>2</sup> A comprehensive description of the methodology is available in the technical appendix. This includes all questionnaire material, sample information and analysis definitions -

[http://stakeholders.ofcom.org.uk/binaries/research/cross-media/2016/technical\\_appendix.pdf](http://stakeholders.ofcom.org.uk/binaries/research/cross-media/2016/technical_appendix.pdf)

### 1.1.4 Activities and definitions

The 28 individual media and communications activities that were recorded by participants were as follows (including the abbreviated terms used in reporting):

	Activity	Abbreviation used
WATCHING	TV (live – at the time it is broadcast, including using the red button)	Live TV
	Recorded TV (programmes or films stored on your personal/ digital recorder box using e.g. TiVo, Sky+ or Freeview+)	Recorded TV
	On-demand / catch-up TV or films (free) e.g. BBC iPlayer, All 4, Sky or Virgin on demand	Free On-Demand
	Downloaded or streamed digital TV or films (paid-for) e.g. Amazon Instant Video, Netflix, iTunes, Blinkbox, Sky Store, Disney Life	Paid On-Demand
	TV or films on DVD, Blu-ray, VHS video	DVD/Bluray
	Short online video clips on e.g. YouTube, News sites (including those through Social Networking sites)	Online video clips
LISTENING	Radio (at the time of broadcast)	Live Radio
	On-demand/'Listen again' radio programmes or podcasts	On-Demand Radio
	Personal digital music or audio collection (e.g. on an ipod, smartphone, computer etc.)	Personal digital audio
	Streamed online music (e.g. Spotify, Apple Music, Amazon Music and Google Play)	Streamed music
	Personal music collection on CD, record or tape	CD/Vinyl
	Music videos (i.e. music video channels or sites that you mainly used for background listening such as through YouTube or on MTV)	Music videos
COMMUNICATING	Through a Social Networking site e.g. Facebook, Twitter (excluding checking updates)	Social networking
	By Instant Messaging (e.g. Facebook Messenger, WhatsApp, BBM)	Instant messaging
	By email (reading or writing emails)	Emailing
	By text message (SMS, including iMessage, reading or writing)	Texting
	By photo or video messages (MMS, viewing or sending) or Snapchat	Photo or video messaging
	By phone call	Phone calls
	By video calls (including Skype, Facetime, etc)	Video calls
READING/BROWSING/USING	Games (on an electronic device e.g. phone, games console)	Video games
	A newspaper/article (printed or online/digital including apps)	Newspapers (print or digital)
	A magazine /article (printed or online/digital including apps)	Magazines (print or digital)
	Other online news e.g. BBC News, Sky News (not through a newspaper site)	Other online news
	Sports news /updates (not through a newspaper site)	Sports news/updates
	A book (printed or eBook)	Books (print or digital)
	Online shopping or ticketing site/ app	Online shopping/ticketing
	Other websites or apps - including checking updates on a social network (e.g. Facebook, Twitter), online banking, etc	Other websites or apps
Other activities such as creating office documents/spreadsheets, creating or editing videos/music/audio, etc or other apps or software/programs	Other activities	

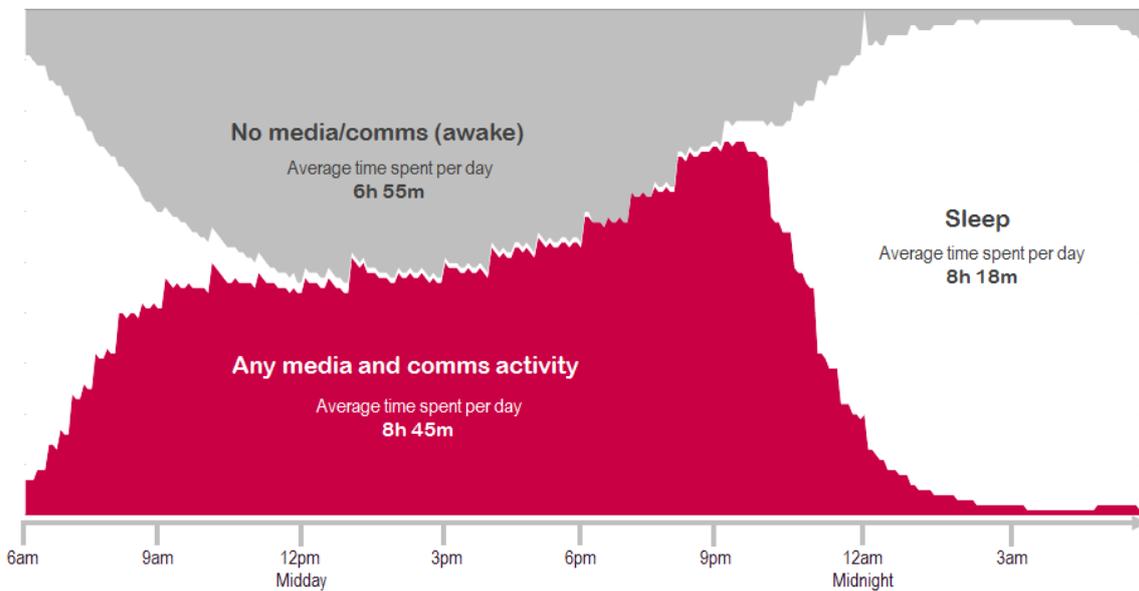
### 1.1.5 Overview of findings

#### More time is spent using media and communications than sleeping

On average, adults sleep for 8 hours 18 minutes in a 24-hour period. While awake they spend the majority of their time (8h 45m vs. 6h 55m) engaged in media or communications activity. These figures are very close to those in 2014, when media engagement was 8 hours 40 minutes per day.

Figure 1.1 shows that media and communications activity increases steadily across the day, reaching a peak in the evening when it accounts for a 74% share at 9pm.

**Figure 1.1 Media and communications activity, by time of day**

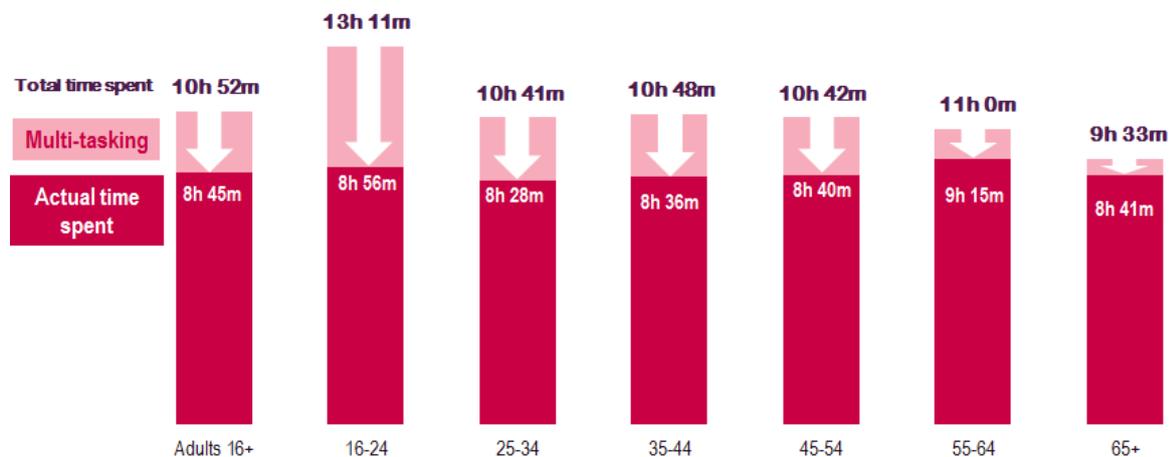


Base: Adults aged 16+ (1512)

**Thanks to multi-tasking, we are squeezing 10 hours 52 minutes of media and communications into 8 hours 45 minutes of actual time each day**

Taking into account activities that are performed simultaneously (e.g. watching and communicating concurrently, which 71% of respondents did at least once over the week), the total media and communications time undertaken by an individual equates to 10 hours 52 minutes. But as some of these activities are undertaken simultaneously, they are squeezed into 8 hours 45 minutes of actual time. Overall there has been little change in this respect compared to 2014, when 11 hours 6 minutes of activity was compressed into 8 hours 40 minutes.

**Figure 1.2 Average daily media and communications time, by age group**



Base: Adults 16+ (1512), 16-24 (129), 25-34 (189), 35-44 (282), 45-54 (299), 55-64 (259), 65+ (354)

## Older adults watch more live TV than in 2014 whereas younger adults watch less

There have been noticeable age shifts in 'total' and in 'actual' (excluding multi-tasking activity) time spent per day. Both figures have fallen for the two youngest age groups: although the decrease in actual time spent is relatively low for 16-24s (12 mins) and 25-34s (11 mins), the total time spent has decreased to a greater extent (55 and 60 mins respectively) This suggests a reduction in the amount of media multi-tasking undertaken by these age groups.

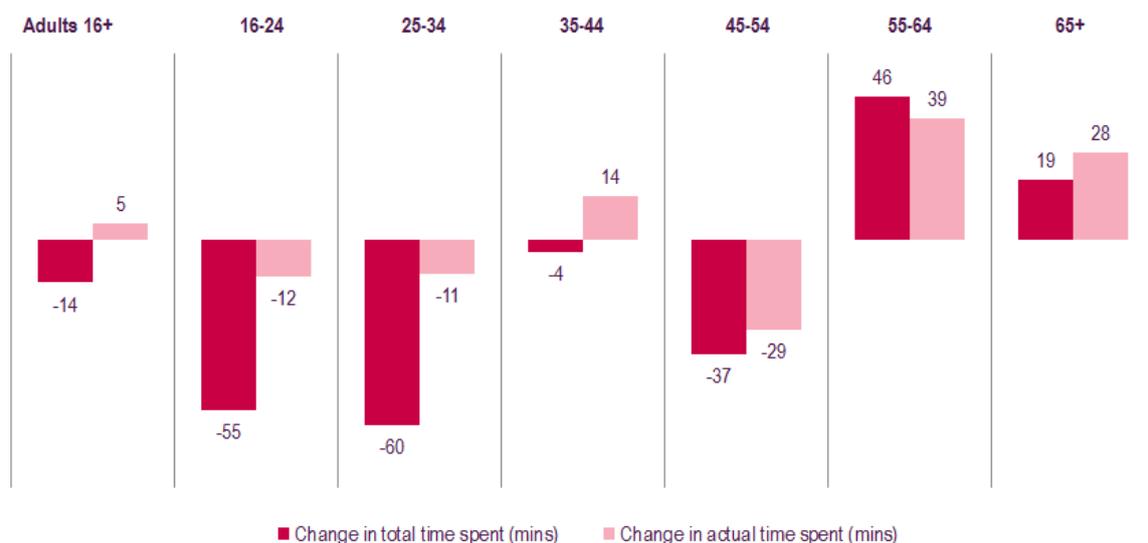
In terms of individual activities, live TV has decreased more than any other activity, among both age groups (42 mins for 16-24s and 37 mins for 25-34s), with on-demand viewing moving the other way (43 mins and 20 mins respectively).

It is evident from the data that on-demand viewing is less of a multitasking activity than live TV viewing; for example, seven of the top ten most popular media multi-tasking combinations involved live TV but none involved on-demand. This is most likely because content has been actively chosen and hence likely to generate more attention. As the other activities that have shown significant decreases in time spent by these age groups ('other websites or apps', texting and phone calls) are commonly associated with multitasking alongside live TV, this supports the theory.

The opposite has occurred for the over-55s. The actual time spent has increased by 39 minutes to 9h 15m for 55-64s, and by 28 minutes to 8h 41m for those aged 65 or over. Unlike the younger age groups, there is less of a gap between the increases in actual and total time spent, and the increase appears to be mainly driven by even more time consuming traditional broadcast content (live TV in the case of 45-54s and those aged 65 or over, and live radio and recorded TV in the case of 55-64s).

Despite this, 16-24s remain the most active media and communications users, by some distance, cramming 13h 11m worth of activity into 8h 56m, compared to 9h 33m worth of activity into 8h 41m for 65+ year olds.

**Figure 1.3 Changes in daily media and communications time since 2014, by age**



Base: Adults 16+ (1512), 16-24 (129), 25-34 (189), 35-44 (282), 45-54 (299), 55-64 (259), 65+ (354)

The following table shows the activities that have had the largest impact on the changes in total time spent per day, shown in the previous chart:

**Figure 1.4 Changes in time spent on specific activities since 2014, by age**

Age	Change	Activities driving changes in total media and communications time
16-24	-55 mins	'Other websites or apps' and 'Other activities' (both -14 mins) Live TV has decreased by 42 mins, but on-demand has increased by 43 mins
25-34	-60 mins	Texting (-31 mins) and phone calls (-13 mins) Live TV has decreased by 37 mins, but this is partly compensated by a 20 min increase for on-demand.
45-54	-37 mins	Live TV (-36 mins)
55-64	+46 mins	Live radio (+23 mins) and recorded TV (+17 mins)
65+	+19 mins	Live TV (+36 mins), although emailing has decreased by 11 mins.

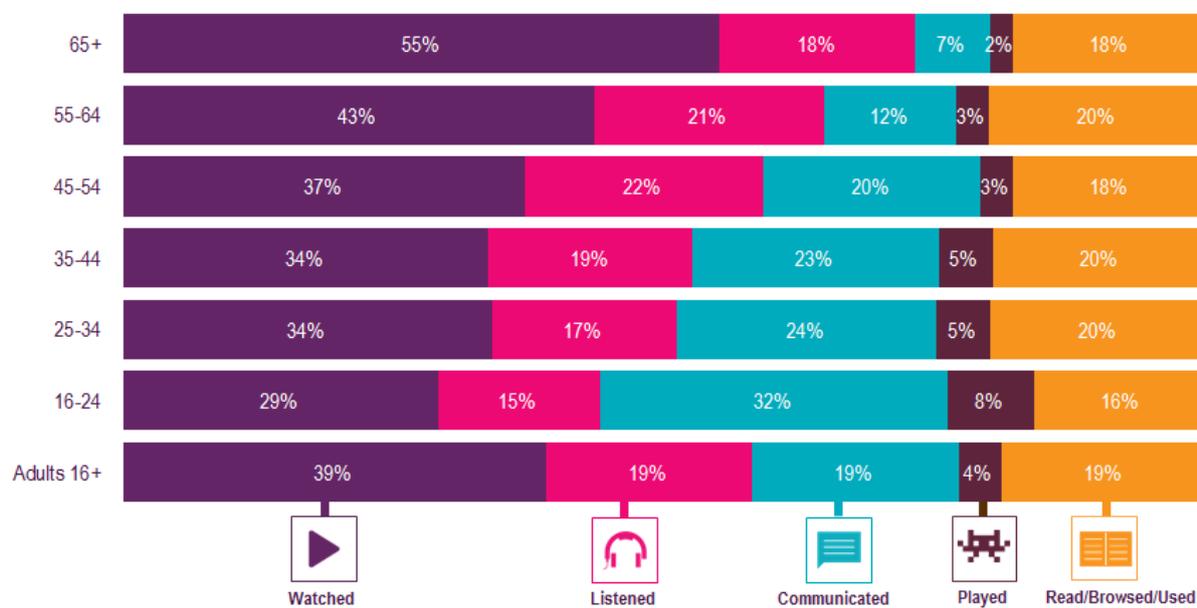
Base: Adults 16+ (1512), 16-24 (129), 25-34 (189), 35-44 (282), 45-54 (299), 55-64 (259), 65+ (354)

**While watching is the most popular activity overall, young adults spend more time communicating**

Watching accounts for 39% of the total time spent on media and communications. For most age groups it represents the most popular type of activity. However, 16-24s spend more of their time communicating (32% vs. 29% for watching).

The distribution of time spent on the five broad activity types (watching, listening, communicating, playing, and reading/browsing/using) has remained relatively stable since 2014 across all age groups, despite the changes in duration shown previously.

**Figure 1.5 Proportion of time attributed to activity types, by age group**

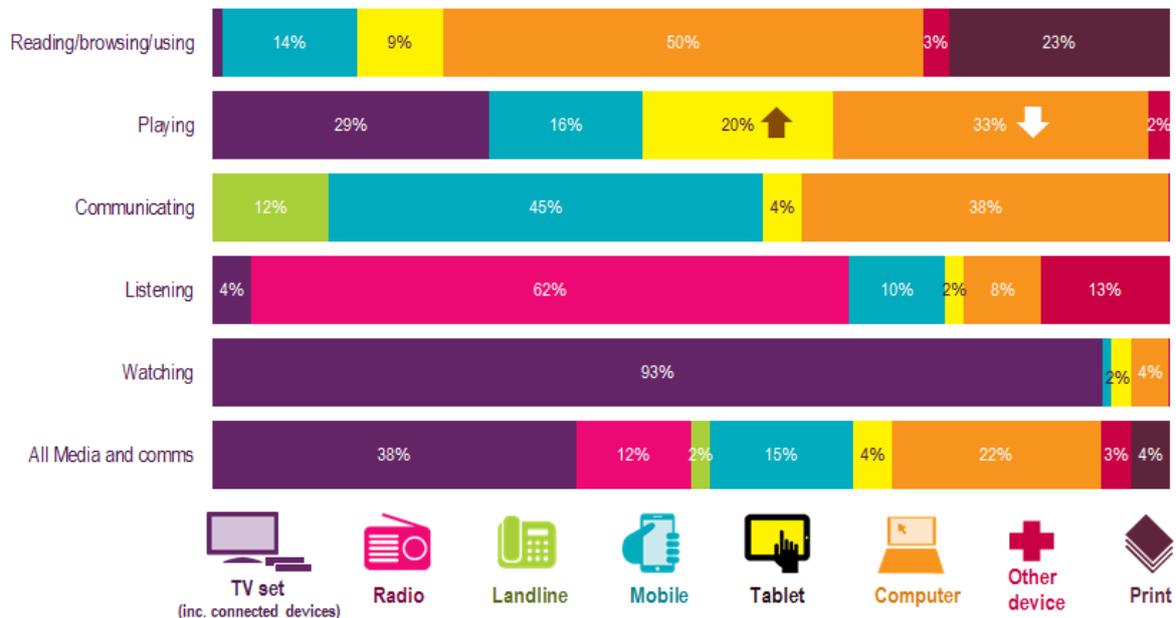


Base: Adults 16+ (1512), 16-24 (129), 25-34 (189), 35-44 (282), 45-54 (299), 55-64 (259), 65+ (354)

Looking at how these activities map onto device use, most watching takes place on a TV set (93%) and most listening takes place on a radio set (62%). Communication time is primarily spent on mobile phones (45%) and computers (including desktops or laptops: 33%), with the latter also accounting for half of the time spent reading/browsing/using.

Compared to 2014, the proportion of time spent playing video games on a tablet has increased from 15% in 2014 to 20% in 2016, while on computers it has decreased from 47% to 33%.

**Figure 1.6 Proportion of time attributed to devices, by activity type**



Base: Adults aged 16+ (1512)

### Live TV and radio combined account for nearly two-fifths of adults' media and communications time

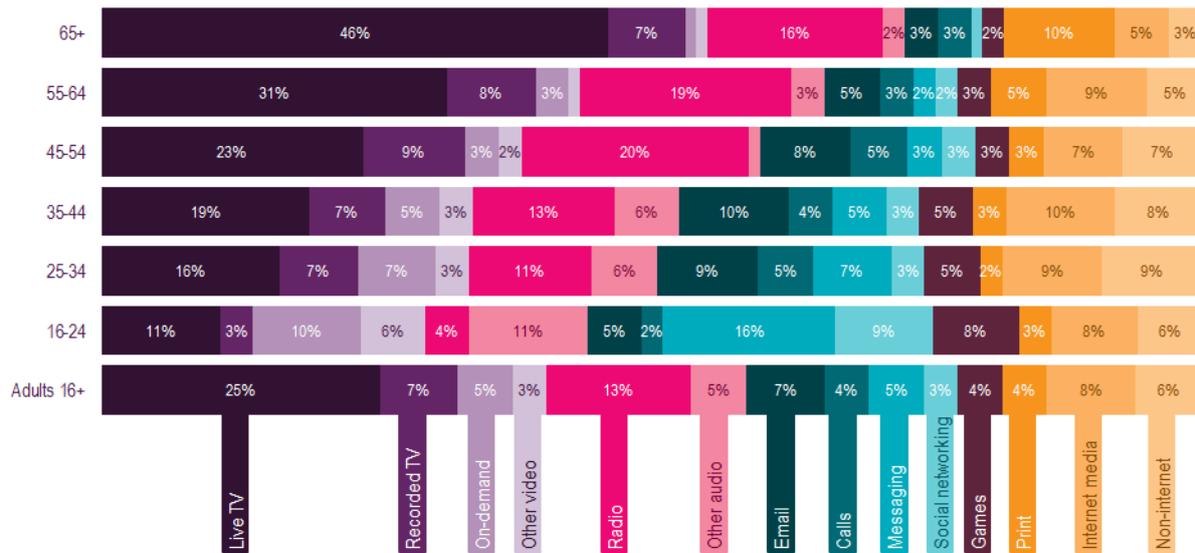
16-24s spend a similar amount of their media and communications time watching live (11%) and on-demand TV (10%). They also spend similar proportions of their time listening to non-radio content (11%), and social networking (9%), while 16% of their time is spent messaging<sup>3</sup> in one way or another. This differs from all other age groups, where live TV and radio dominate media time (generally increasing with age) and email is the most prominent communications method.

For watching TV, 16-24s are more likely to use devices such as smartphones, tablets and computers. They have the lowest proportion of overall time attributed to watching TV on a TV set, at 19% (a decrease from 24% in 2014), and a higher share on other devices (7%, compared to 3% of 65+ year olds). For 65+ year olds, watching TV on a TV set has actually increased in share, from 49% to 54%.

In total, 29% of 16-24s' total media and communications activity is text communication (an increase of 6pp since 2014), compared to 16% for all adults and just 4% for 65+ year olds.

<sup>3</sup> For the purpose of this analysis, messaging includes instant messaging (IM), photo/video messaging (MMS) and text messaging (SMS)

**Figure 1.7 Proportion of time attributed to activities, by age**



Base: Adults 16+ (1512), 16-24 (129), 25-34 (189), 35-44 (282), 45-54 (299), 55-64 (259), 65+ (354)

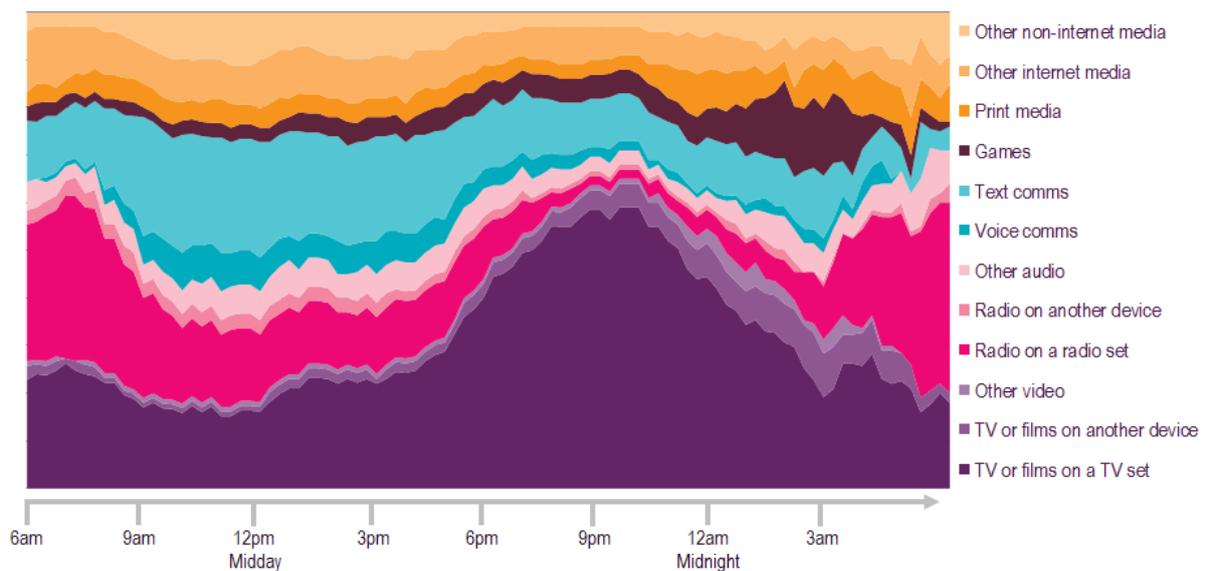
**Watching TV or films on a TV set still dominates evening media time**

Figure 1.8 shows the proportion of all media and communications activity participated in by time of day (across a week) among all adults. As we have seen throughout, this does differ substantially by age group:

- Watching TV or films on a TV set<sup>4</sup> is the most popular activity in the evenings, taking up 59% of media and communications activity time between 9.15 and 10pm, exactly the same share for this time period in 2014. This figure is 30% for 16-24s and 82% for those aged 65+. Although it does still constitute the majority share for the younger age group at this time of the evening, text communications are not far behind (25%).
- Radio on a radio set comprises 35% of time between 7.15 and 7.30am (51% for 65+ year olds vs. 25% for 16-24s). This is an increase since 2014 (30%), with TV on a TV set reducing its share from 31% to 25% at this time of day.
- Text communications retains a stable share (19-25%) at all times between 8.30am-5pm (largely driven by email at work). The highest share it reaches, at any time of day, for 65+ year olds is 11% (at 10am), compared to 43% at 9am for 16-24s.

<sup>4</sup> Watching TV or films on a TV set includes live, recorded, on-demand (paid or free) and DVD/Blu-ray

**Figure 1.8 Proportion of media and communications, by time of day**

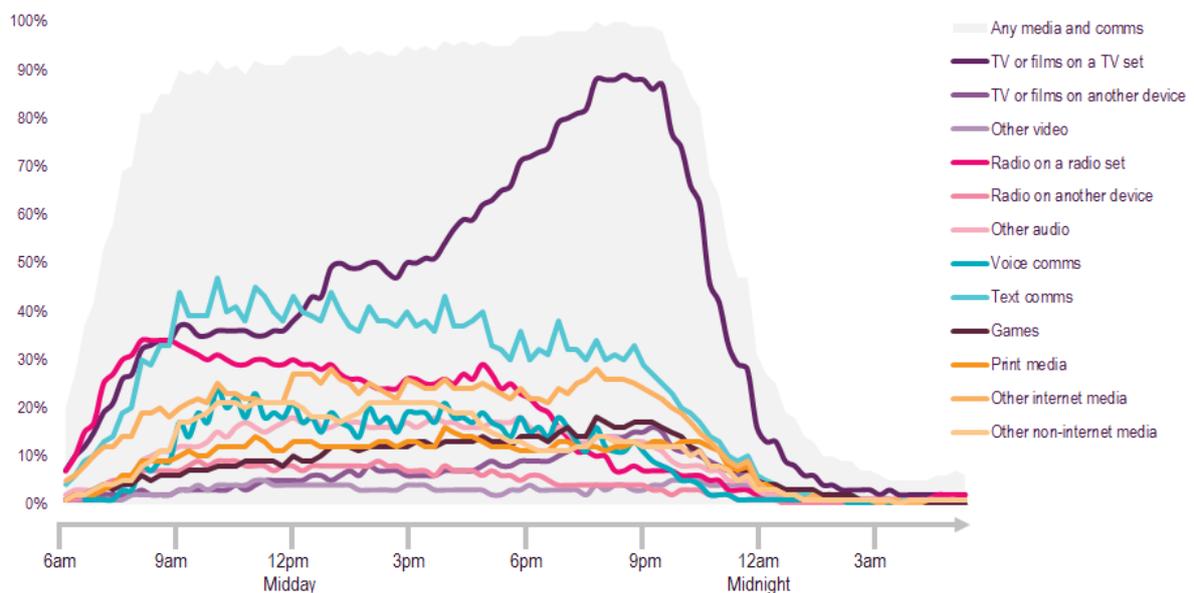


Base: Adults aged 16+ (1512)

The dominance of TV in the evening period, and the popularity of radio in the morning (this has the highest reach levels of all activities until 9am), is reflected in terms of ‘reach’ (the proportion of adults who do each activity) at specific times of the day.

Around nine in ten adults watch TV or films on a TV set between 8pm and 10pm at any point across a week. This compares to a peak of 47% for text communications (at 10am), which is higher than TV from 9am to midday, but decreases thereafter.

**Figure 1.9 Weekly reach of grouped activities, by time of day**

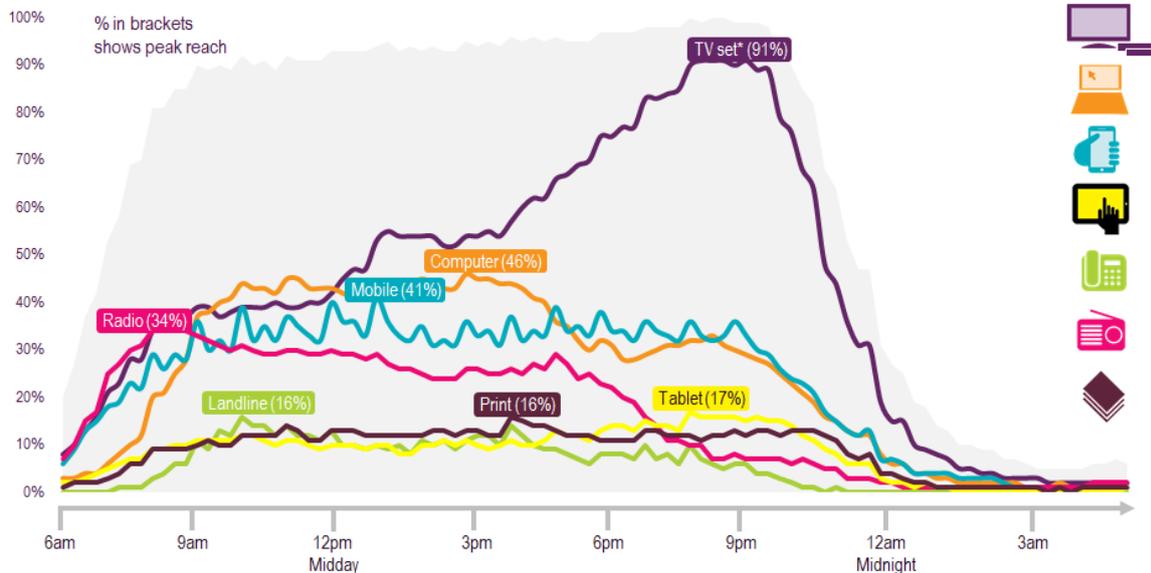


Base: Adults aged 16+ (1512)

The patterns shown above for TV and radio content across the day are clearly mirrored by their primary associated devices, i.e. the TV set and radio set, as shown in Figure 1.10.

The use of mobile phones also closely mirrors text communication, remaining relatively steady from 9am to 9pm with a peak of 41% at 1pm. Use of computers has a slightly higher peak (46%) at 3pm, and is then steady during the day, with at least two-fifths of adults using one between 9.45am and 5pm (reflecting its reliance for work). Use of tablets, landlines and print media is also fairly stable at most times of the day, but never achieves a reach of more than 20% throughout the day.

**Figure 1.10 Weekly reach of devices, by time of day**



Base: Adults aged 16+ (1512)

### Instant messaging has become more popular, at the expense of SMS and email

Figure 1.11 shows the proportion of adults who did each activity at least once during their diary week. Despite its decrease of 3pp, live TV still reaches a higher proportion of adults than any other media and communications activity, at 91%, as was the case in 2014. This is followed by phone calls (83%) and live radio (76%).

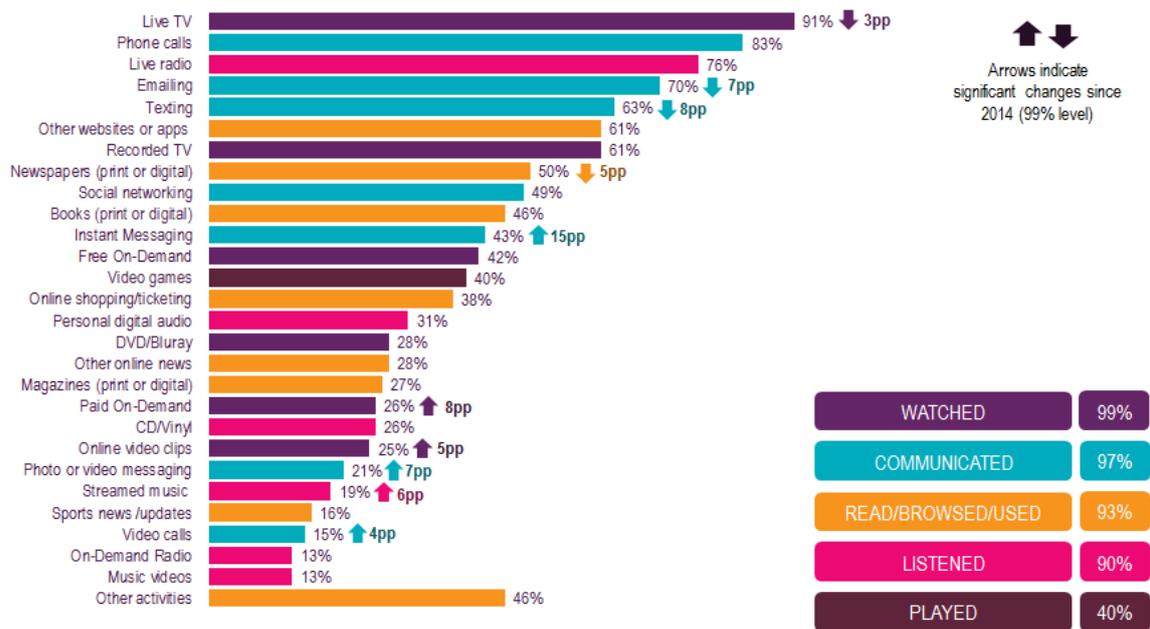
Although emailing and texting remain the most commonly-used text communication methods at 70% and 63% respectively, they have both decreased since 2014 (by 7pp and 8pp), while instant messaging and photo/video messaging have increased (by 15pp and 7pp).

For instant messaging, the increase has occurred across all age groups. Although 16-24s are the prominent users, at 53%, the increase among this age group (+15pp from 2014) has been less substantial than for 25-34s (+28pp) and 35-44s (+22pp).

### Subscription on-demand has become popular but TV reach remains high

There have also been significant increases in weekly reach for paid-for on-demand TV (26% from 18%), online video clips (25% from 20%) and streamed music (19% from 13%). All three of these activities now reach over half of 16-24s in a given week (57%, 59% and 51% respectively). The only other activity to show a decrease is reading newspapers (including print and digital versions), which fell by 5pp to 50% of adults.

**Figure 1.11 Weekly reach of media and communications activities**

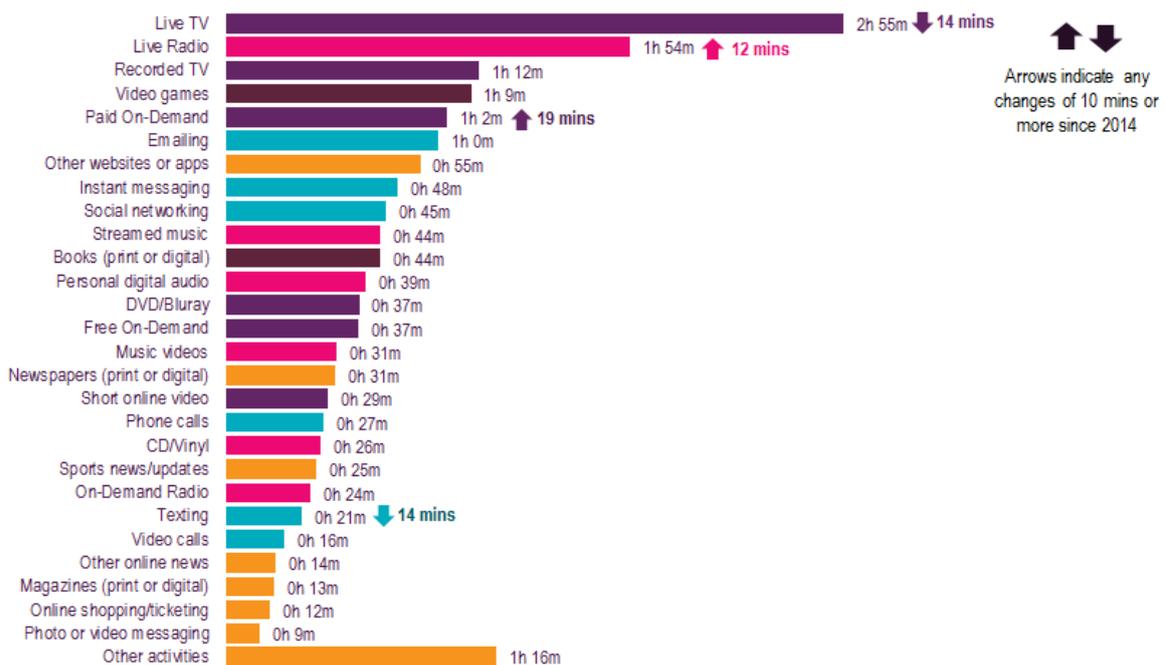


Base: Adults aged 16+ (1512)

Earlier on we discussed how overall time spent on media and communications activities has remained relatively consistent across *all adults*, but there have been a number of significant shifts within age groups, driven by certain activities. We can look at these changes among only those people who do each specific activity across the week.

Among those who watch live TV at all during a week, the average duration per day has decreased by 14 minutes since 2014 to 2h 55 mins. However, this activity still accounts for about an hour more than the second highest activity, live radio (up by 12 minutes since 2014, averaging 1h 54m per day). Two other activities have changed by ten minutes or more since 2014: watching paid on-demand TV (up by 19 mins) and texting (down by 13 mins).

**Figure 1.12 Average time spent on activities per day (excluding zeros)**



Base: Adults aged 16+ (1512)

By age group, findings are largely consistent with those mentioned earlier in connection with the breakdown of total media and communications time):

- The decrease in time spent watching live TV is more prominent among those aged under 35: from 2h 24m to 1h 45m for 16-24s, and from 2h 32 to 1h 59m for 25-34s. For these age groups, time spent watching paid-for on-demand content has increased by 37 minutes (to 1h 19m) and by 20 minutes per day (to 1h 8m).
- In contrast, the 4h 24m spent by 65+ year olds watching live TV is an increase of 27 minutes since 2014. Even among paid or free on-demand viewers, the average time spent watching this type of content per day (35 mins) is much lower for 65+ year olds than for 16-24s (1h 28m).
- The two generic reading/browsing/using activities, 'Other websites or apps' (down by 22 mins to 1h 3m) and 'Other activities' (down by 31 mins to 1h 19m) have fallen considerably among 16-24 year olds since 2014. There are several factors that may have contributed to the reduction in these types of activities:
  - Many people now have access to faster connections on 4G / superfast broadband, allowing online tasks more quickly and efficiently.
  - The increased use of apps on mobile devices tends to be more task-driven, with a reduction in browsing, thereby enabling more efficient use of time.
  - Other sources suggest that a significant number of people are consciously limiting the amount of time they spend online ('digital detoxing').
  - Our media literacy work<sup>5</sup> has found that since 2014 an increased number of people are only using websites they know, thereby limiting their repertoire to services that provide multiple services in the same place (e.g. Facebook).

### **16-24s consider instant messaging as their most important means of communication**

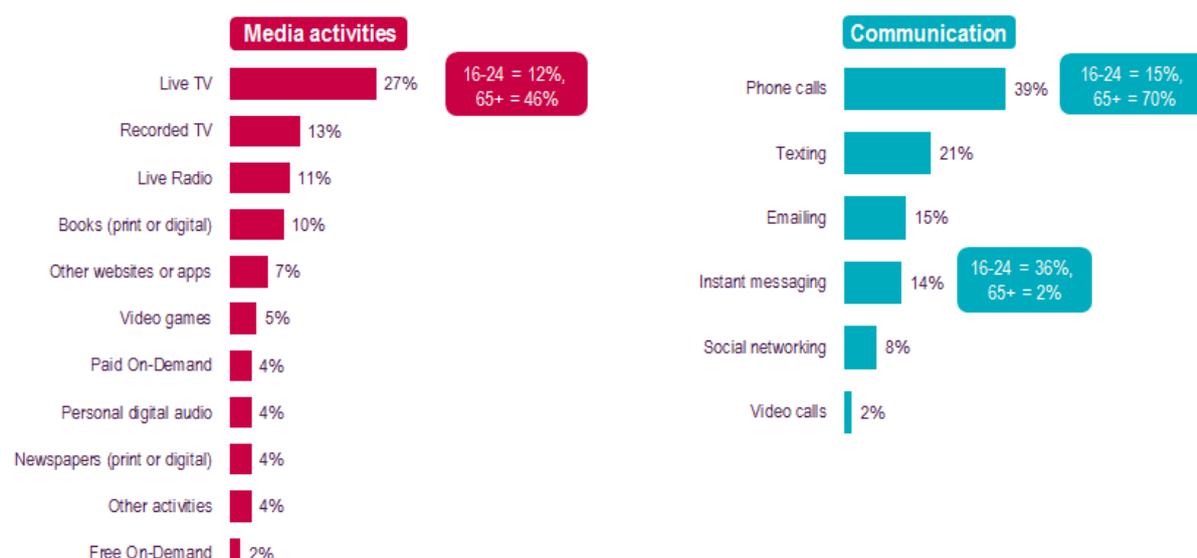
Perceived importance of media activities largely reflects usage. When asked which media activities, from a list, they considered to be the most important to them, live (27%) and recorded TV (13%) were, taken together, cited by a fifth of adults. However, this varies substantially by age, ranging from 12% of 16-24s to 46% of those aged 65+. For the former, responses are much more varied: video games (12%), personal digital audio (11%), books (10%) and paid-for on-demand video (10%) all rank alongside live (12%) and recorded TV (11%).

When we asked the same question, but in relation to communication methods, the results also varied heavily by age. While on average two-fifths of adults thought phone calls were the most important method, this ranged from 15% of 16-24s to 70% of 65+ year olds. In contrast, 36% of the younger age group felt that instant messaging was most important, compared to 2% of the older age group.

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<sup>5</sup> <http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/media-lit-2016/>

**Figure 1.13 Media and communications activities cited as most important**



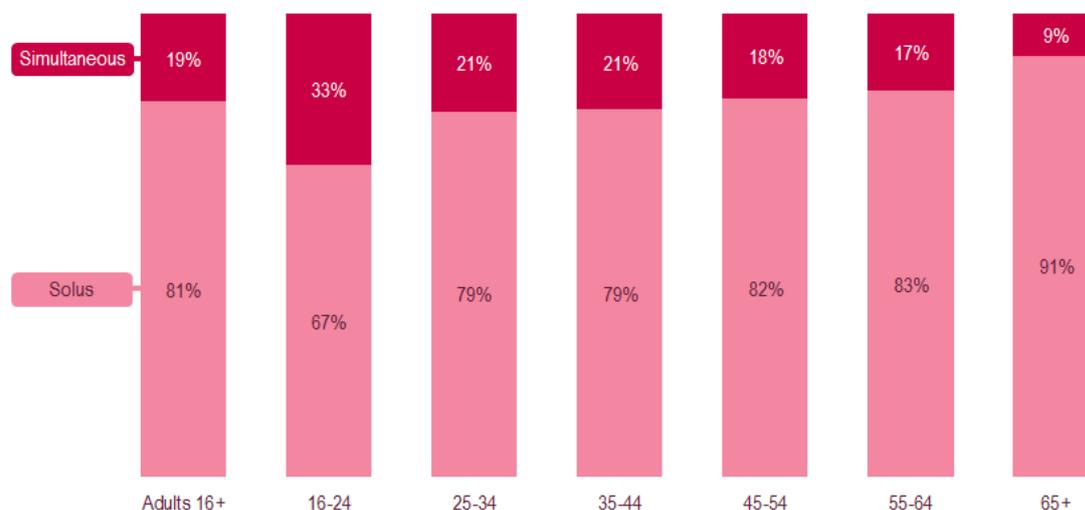
Base: Adults aged 16+ (1512)

Q. Which of the following media activities/communications activities is most important to you personally?

**A fifth of all media and communications time is spent media multi-tasking**

Across a week, 92% of adults engage in any media multi-tasking (i.e. doing two or more activities simultaneously)<sup>6</sup>. This constituted around a fifth (19%) of all media and communications activity, ranging from 9% for those aged 65+ to 33% for 16-24s.

**Figure 1.14 Proportion of solus vs. simultaneous minutes, by age**

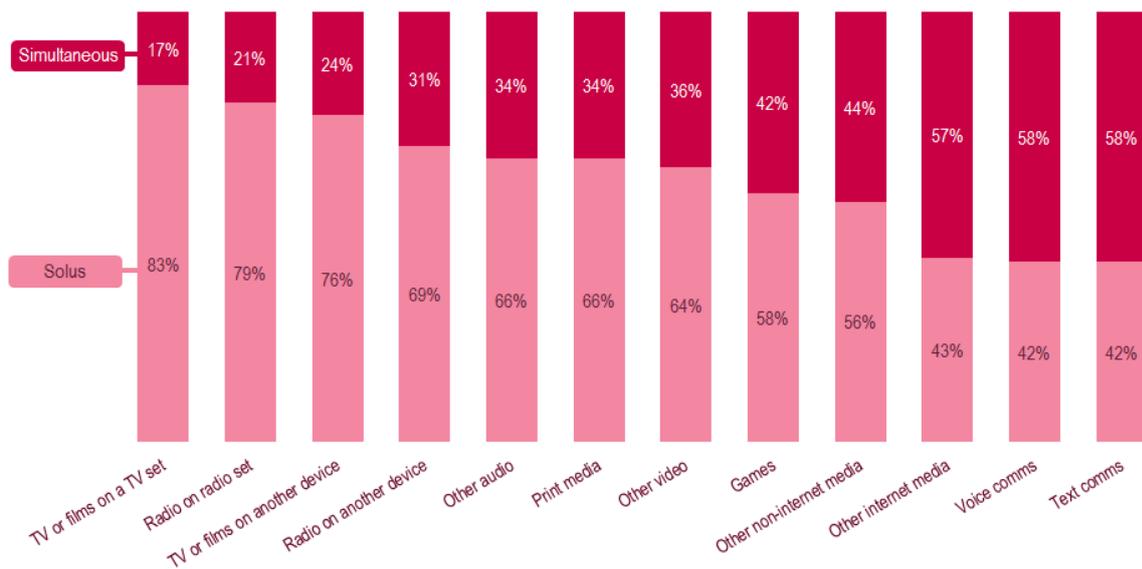


Base: Adults 16+ (1512), 16-24 (129), 25-34 (189), 35-44 (282), 45-54 (299), 55-64 (259), 65+ (354)

Watching TV or films on a TV set was the activity most likely to be undertaken on its own (83% of total viewing), whereas the majority of text communication (56%) was undertaken at the same time as doing other media activities, such as watching TV (e.g. 30% of adults engaged in a phone call while watching TV).

<sup>6</sup> Note: the definition used for media multi-tasking has changed slightly from 2014, and so although they are similar, the results can't be directly compared accurately. Multi-tasking is calculated whenever there is a 1+ minute overlap of activities recorded on the diary. So if one activity finishes at 12:00 and another starts at 12:00, this is not counted as multi-tasking (as it was in 2014).

**Figure 1.15 Proportion of solus vs. simultaneous minutes, by grouped activities**



Base: Adults aged 16+ (1512)

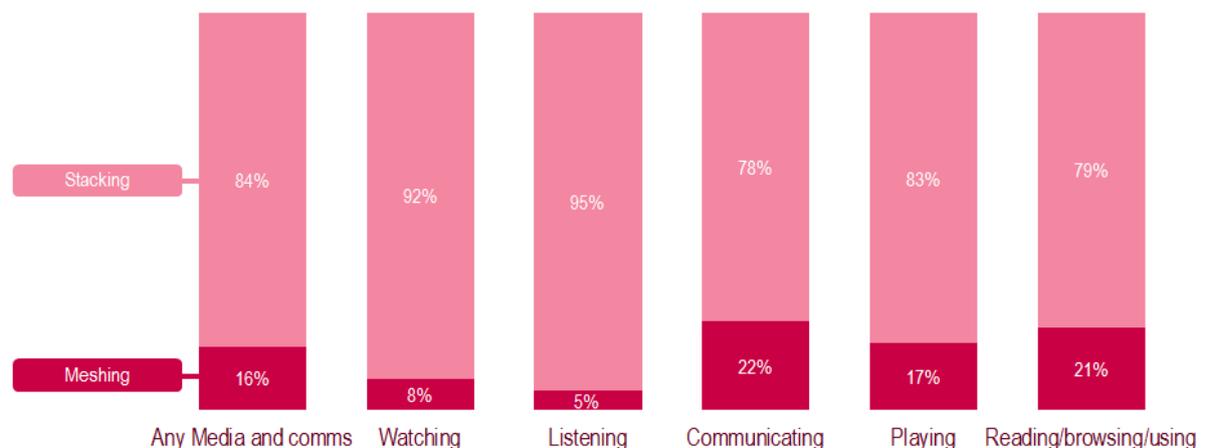
Media multi-tasking can be segmented into a further two categories<sup>7</sup>:

**Meshing** - When the simultaneous activities are related e.g. searching for info on a TV programme online while watching it.

**Stacking** - When the simultaneous activities are not related e.g. instant messaging with a friend while watching TV (not in relation to the programme).

The research showed that doing two or more unrelated activities ('stacking') is much more common (done by 90% of people across the week) than doing two or more related activities ('meshing'); just under four in ten do this in a week. This pattern is also shown in the overall distribution of time, with media stacking representing the largest share of multi-tasking (84%). Media stacking was most likely to occur in combination with watching TV or listening to the radio – watching live TV while talking on the phone was the most popular combination.

**Figure 1.16 Proportion of stacking vs. meshing minutes, by activity types**



Base: Adults aged 16+ (1512)

<sup>7</sup> Note: This was a new element introduced in the 2016 study, so no comparable data are available for 2014.