

Annex 4. Online Media Services

PSB Annual Report
December 2014

Contents

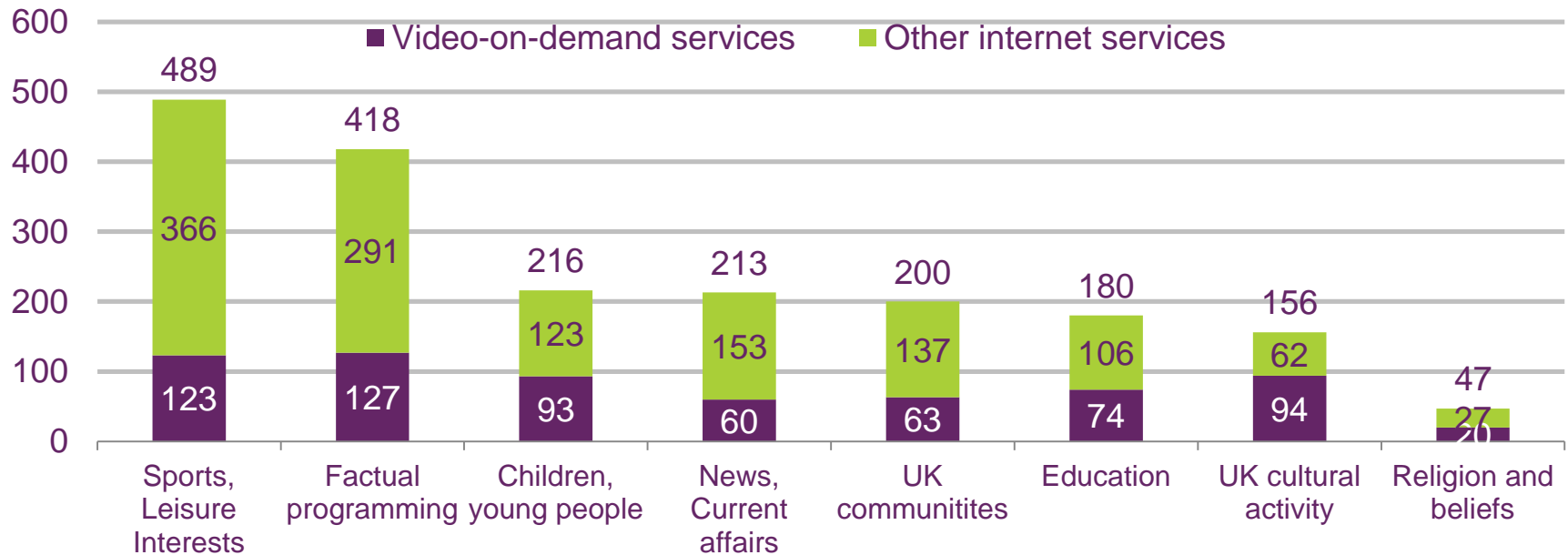
- Output
- Take-up and consumption
- Audience attitudes

OUTPUT

Figure 1

Online media services by public service objective, June 2014

Number of online media services

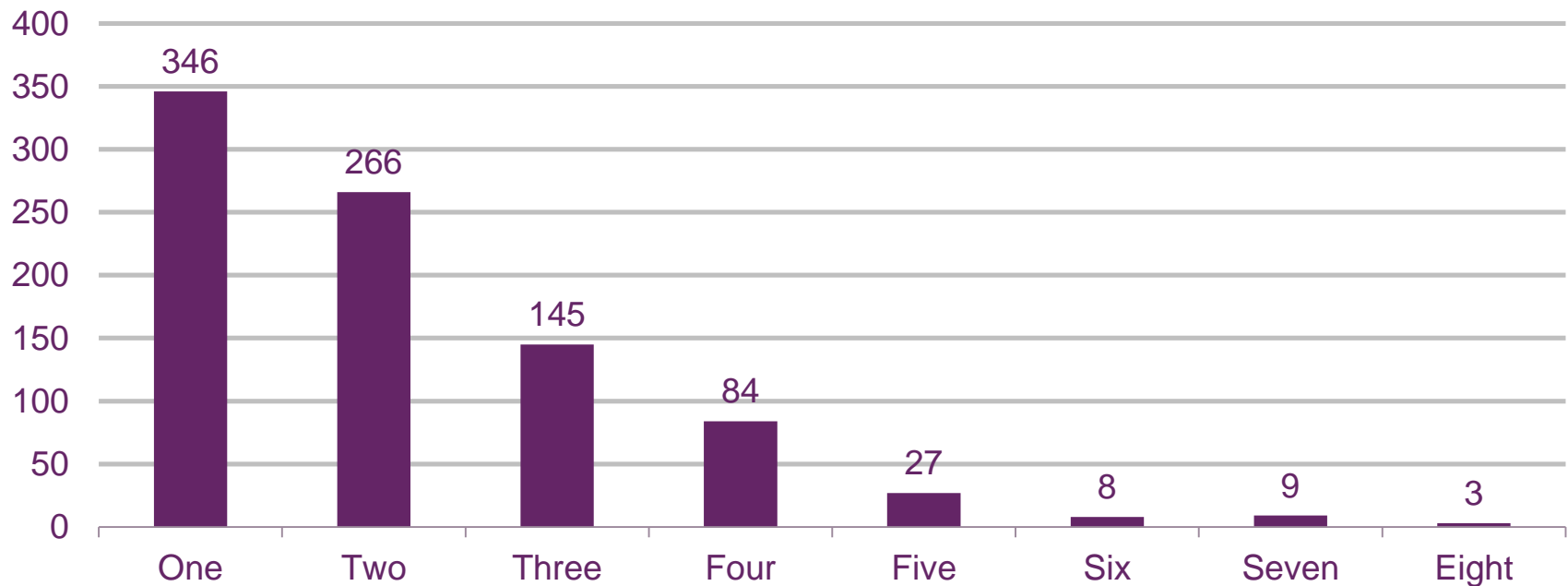


Source: How online media services have fulfilled the public service objectives, Enders Analysis, September 2014

Figure 2

Number of public services objectives fulfilled by online media services

Number of online media services

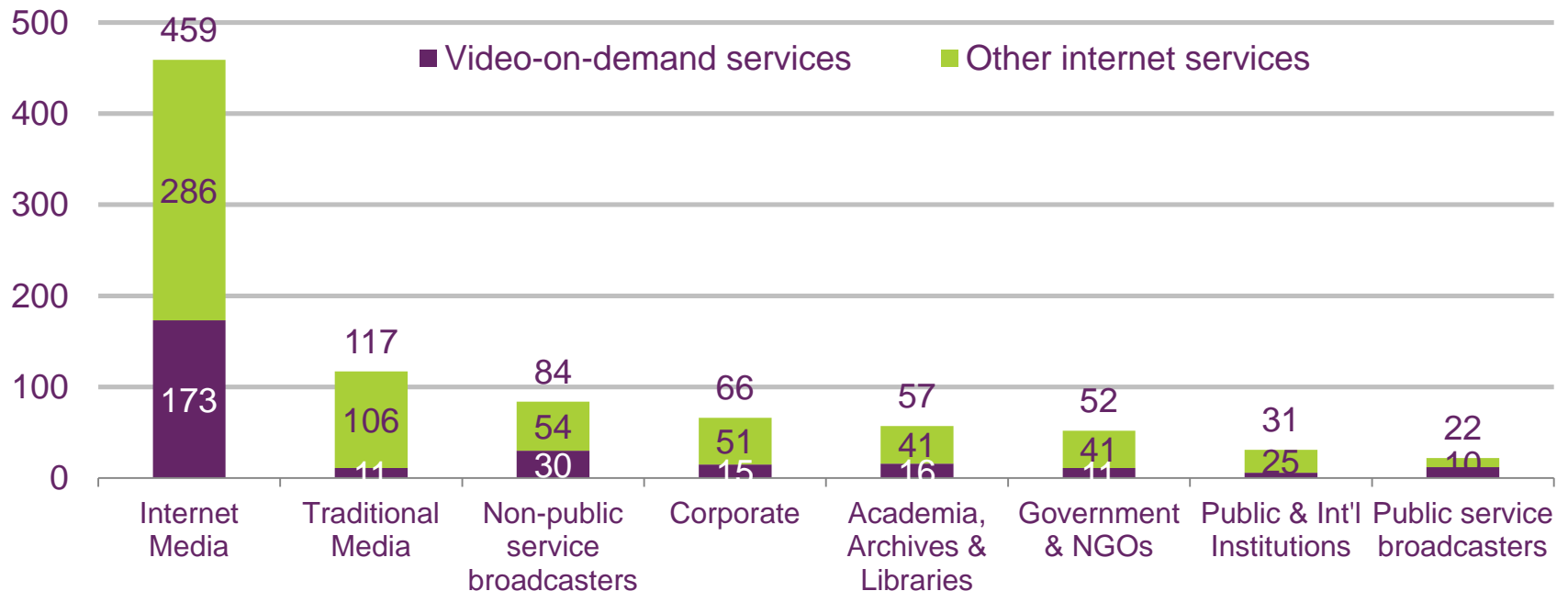


Source: Ofcom, Enders Analysis, September 2014

Figure 3

Online media services, by organisation type: June 2014

Number of online media services

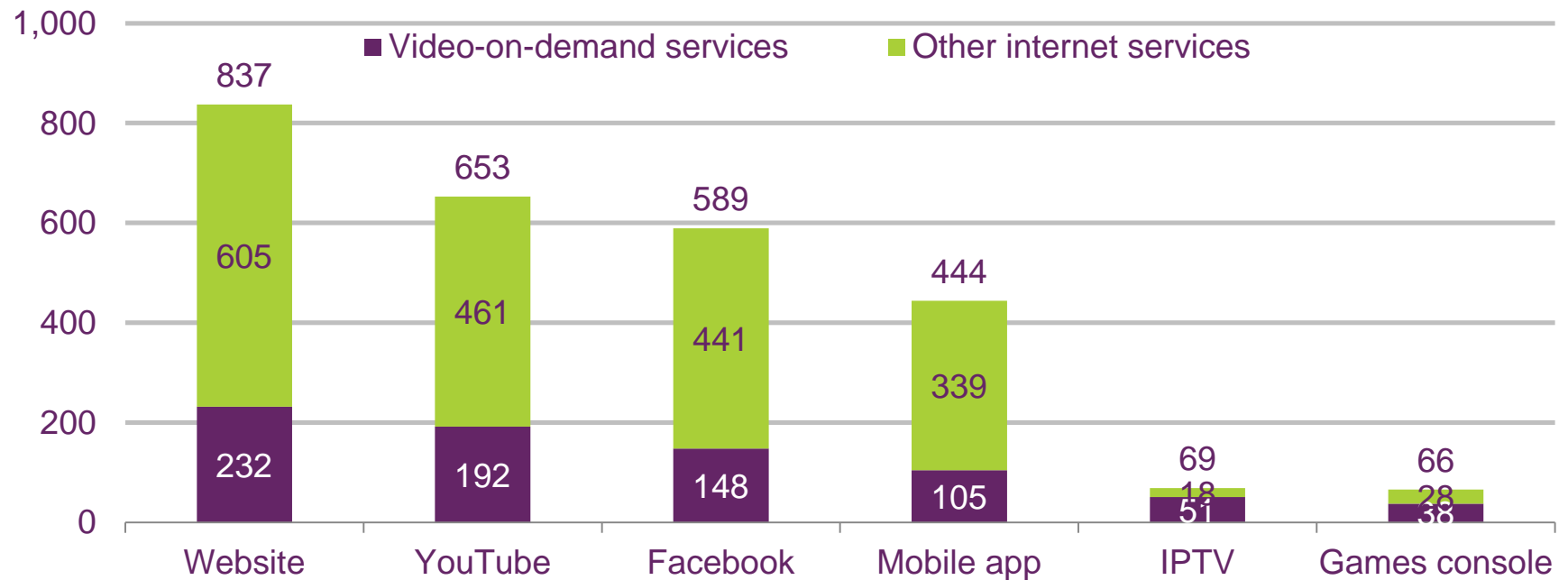


Source: How online media services have fulfilled the public service objectives, Enders Analysis, September 2014

Figure 4

Number of online media services, by platform: June 2014

Number of online media services



Source: Enders Analysis, How online media services have fulfilled the public service objectives, September 2014

Fig 5 Availability of VOD services, by device: H2 2013



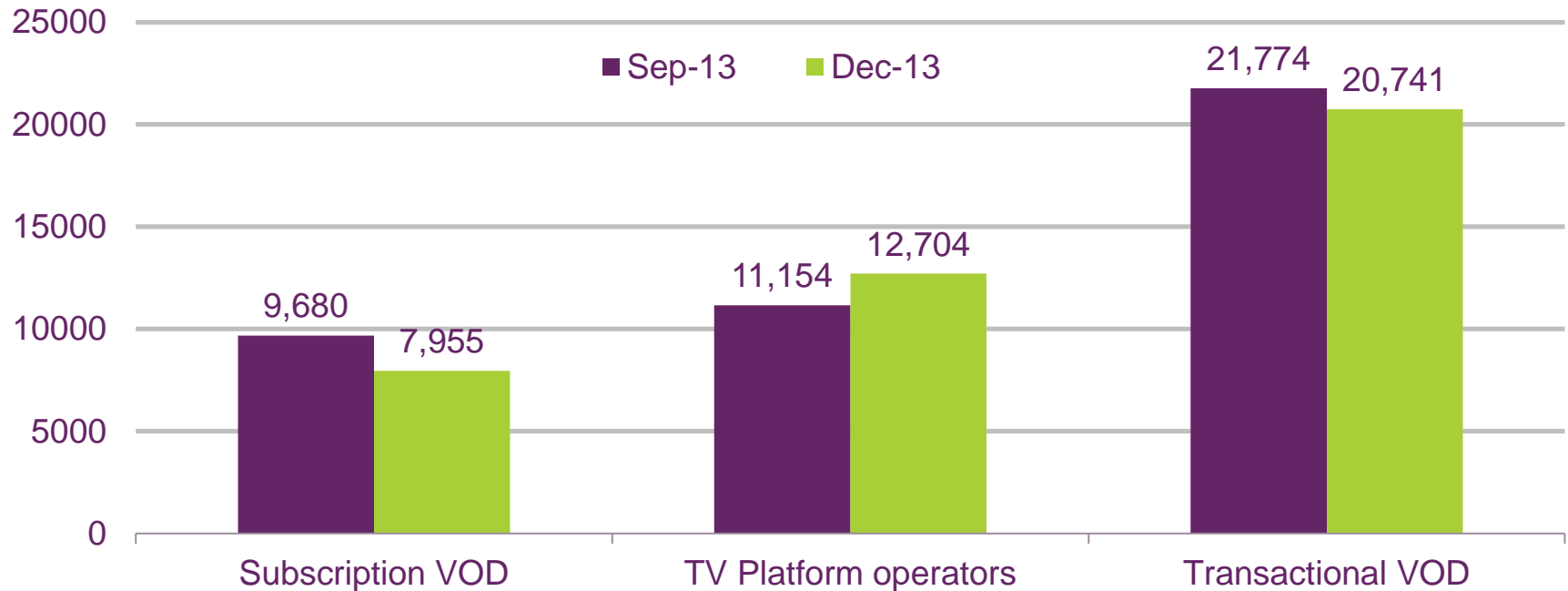
Device		VOD Service																							
		BBC iPlayer	ITV Player	4oD	Demand 5	Film4	Sky On Demand	Sky Go/ Sky Go Extra	Sky Store	NowTV	Virgin TV On Demand	Virgin TV Anywhere	BT Player	TalkTalk Player	iTunes	Google Play	BlackBerry World	Netflix	Love Film	Blink Box	Wuaki.tv	Sainsbury's Entertainment	Xbox Video	Sony Entertainment Network	Video Unlimited
Set top box		✓	✓	✓	✓	✗	✓	✗	✓	✓	✓	✗	✓	✓	✓	✗	✗	✓	✓	✓	✗	✗	✗	✗	✗
Smart TV (apps only)		✓	✓	✓	✓	✗	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	✗	✗	✓
Blu ray player		✓	✓	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✗	✗	✗	✗	✓
Game console	Xbox 360	✓	✗	✓	✓	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓	✗	✗
	PS3	✓	✓	✓	✓	✗	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✗	✗	✗	✗	✓
PC		✓	✓	✓	✓	✓	✗	✓	✓	✓	✗	✓	✗	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗
Tablet /smart phone	Android	✓	✓	✓	✓	✗	✗	✓	✗	✓	✗	✓	✗	✗	✗	✓	✗	✓	✓	✓	✓	✗	✗	✗	✓
	iOS	✓	✓	✓	✓	✗	✗	✓	✗	✓	✗	✓	✗	✗	✓	✗	✗	✓	✓	T	✓	✓	✗	✗	✗

Source: Ofcom

Figure 6

Asset comparison, by VOD service type

Average number of assets



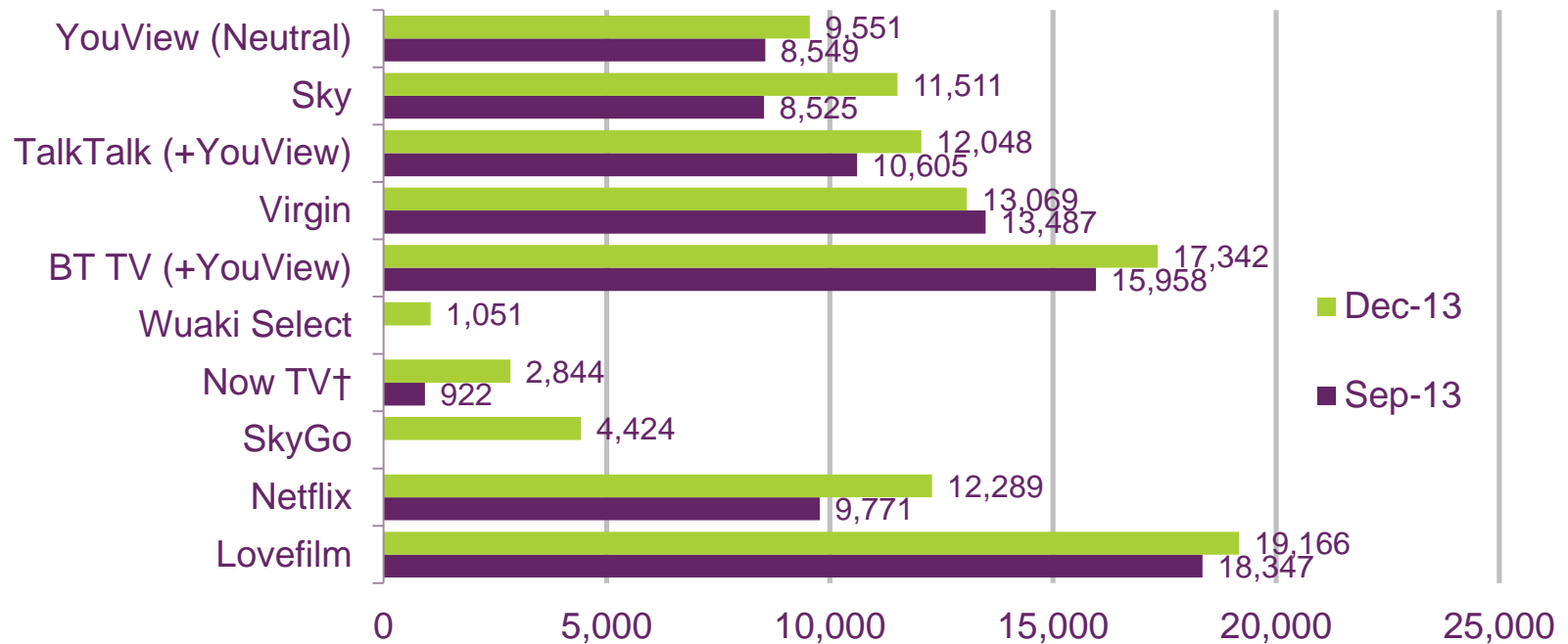
Source: Decipher, VOD Audit - Q4 2013

Note: Decipher's terminology has been adapted to match Ofcom's terms of reference.

Figure 7

SVOD and television platform VOD services: total asset comparison

Number of assets



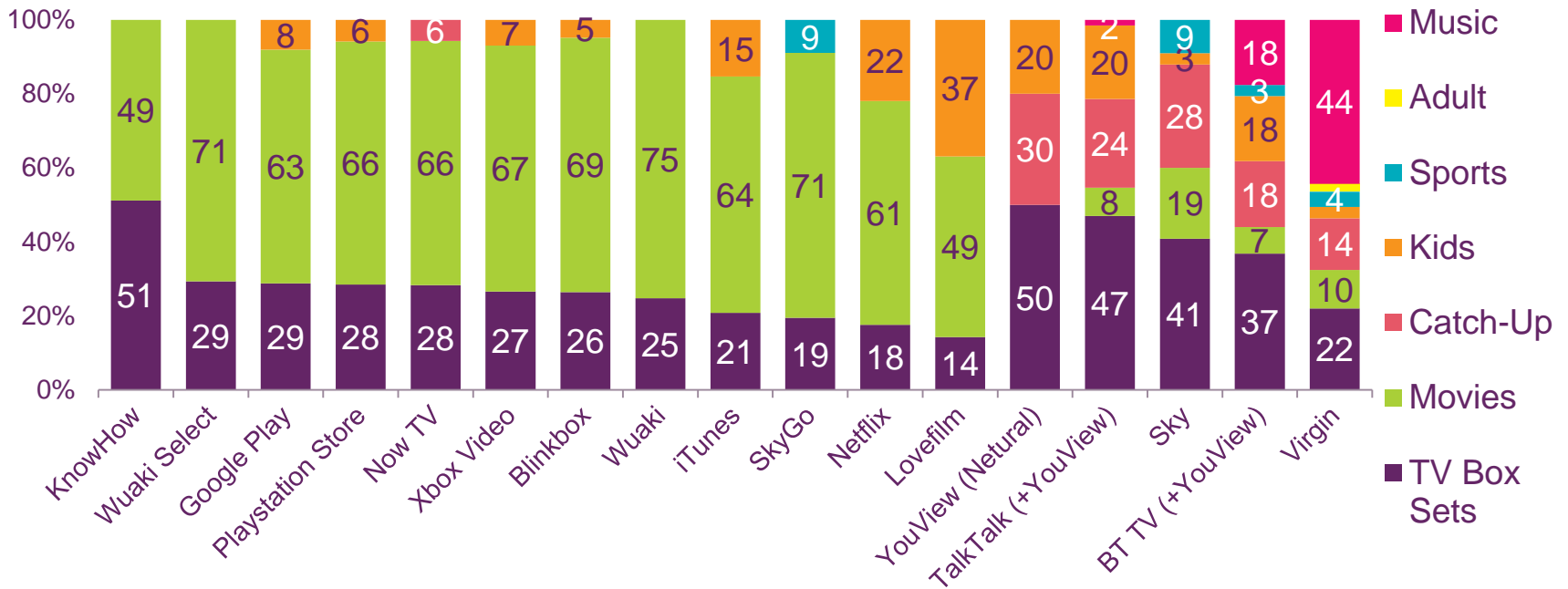
Source: Decipher VOD Audit - Q4 2013

Note: This edition of the VOD Audit no longer counts SD and HD versions of the same content as separate assets. Historical data included has been adjusted accordingly

Figure 8

Genre shares, by VOD service

% Share

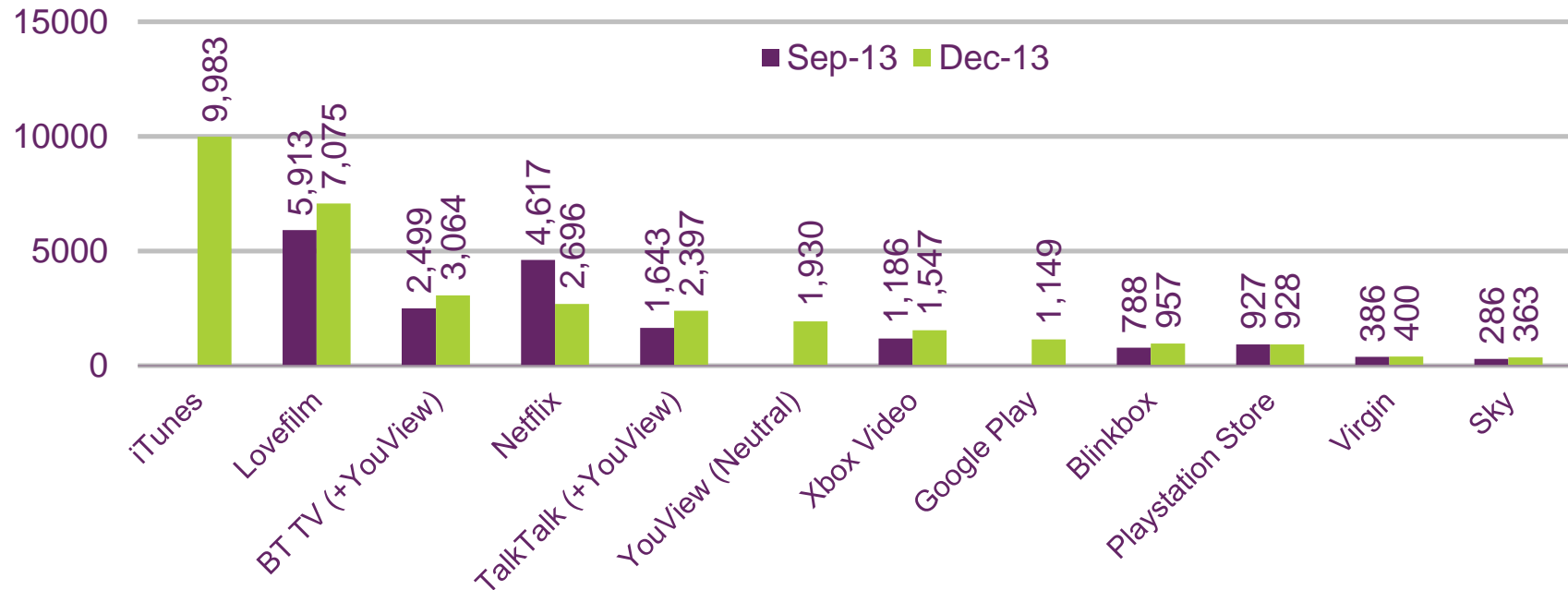


Source: Decipher VOD Audit - Q4 2013

Figure 9

Kids' on-demand

Number of kids' assets



Source: 140106 - VOD Audit - Q4 2013

*(x%) is difference to Sep-13

Note: Change in collection methodology accounts for drop in Netflix content.

Note: Any services not offering Kids content are not included

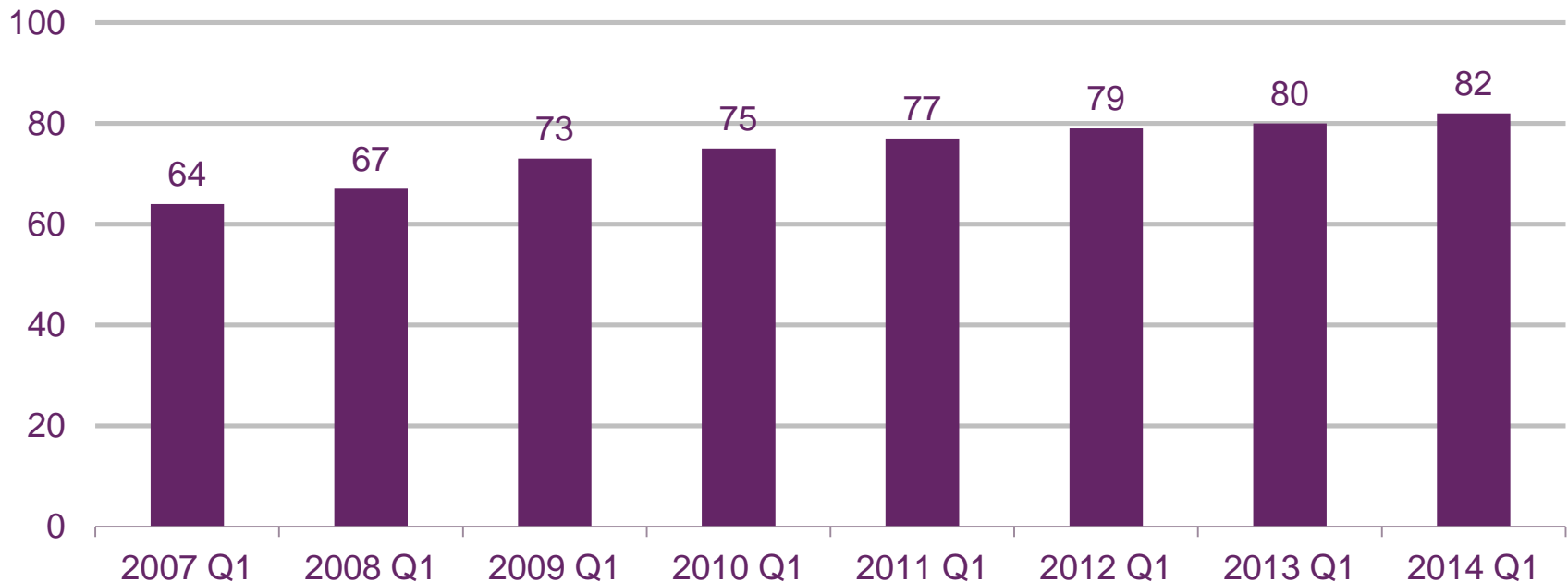
TAKE-UP AND CONSUMPTION

The internet

Figure 10

Internet access: 2007-2014

Adults 16+ (%)



Source: Ofcom technology tracker, Q1 2014

Note: From Q1 2009 the 'Internet' figure includes those who access the internet on mobile phones. QE2: Do you or does anyone in your household have access to the Internet/Worldwide Web at HOME (via any device, e.g. PC, mobile phone etc)? / QE9: Which of these methods does your household use to connect to the Internet at home?

Figure 11

Mobile internet access: 2009-2014

Adults 16+ (%)



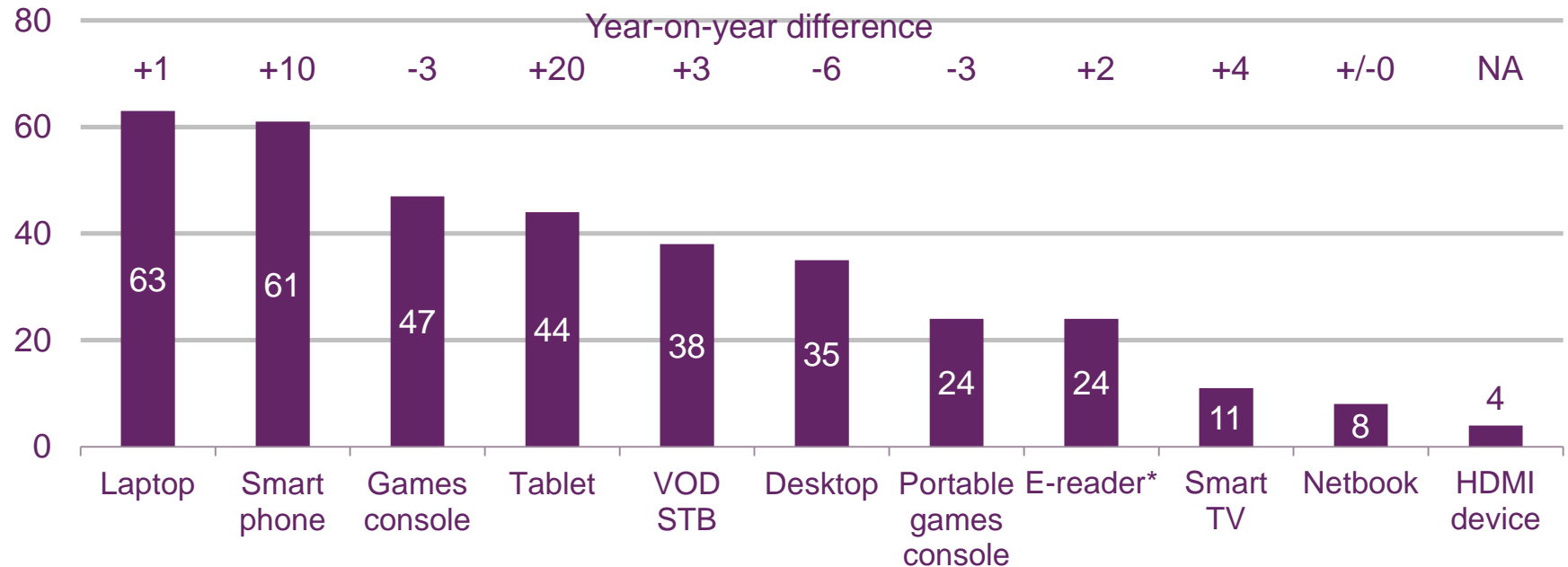
Source: Ofcom technology tracker, Q1 2014. Base: All adults aged 16+ (n=3740).

Note: "Internet on mobile" is the % of adults who use a mobile phone for any of the following activities: Instant messaging, Downloading Apps or programs, Email, Internet access, downloading video, video streaming, visiting social networking sites.

Figure 12

Ownership of internet-enabled devices

Household take-up (%)



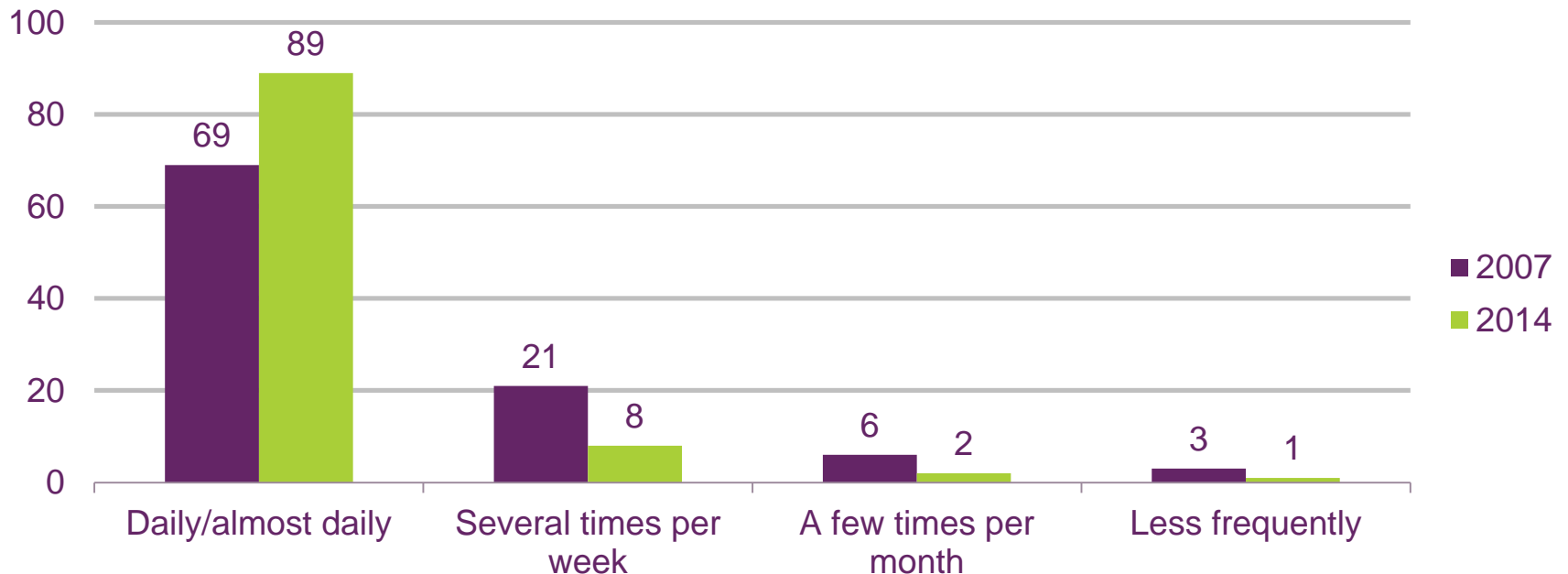
Source: Ofcom research, Q1 2014; Base: Adults aged 16+ n = 3740

Note: IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, PlayStation Portable/Vita), VOD STB (all Virgin TV customers, Sky+ HD, BT TV, TalkTalk TV and YouView), e-reader, tablet, netbook, smart TV, and HDMI device (Roku, Chromecast, Now TV). *E-reader take-up stated here is per household while elsewhere in the report we state figures by individual take-up.

Figure 13

Frequency of internet use: 2007 and 2014

Adults with internet access 16+ (%)



Source: Ofcom consumer research

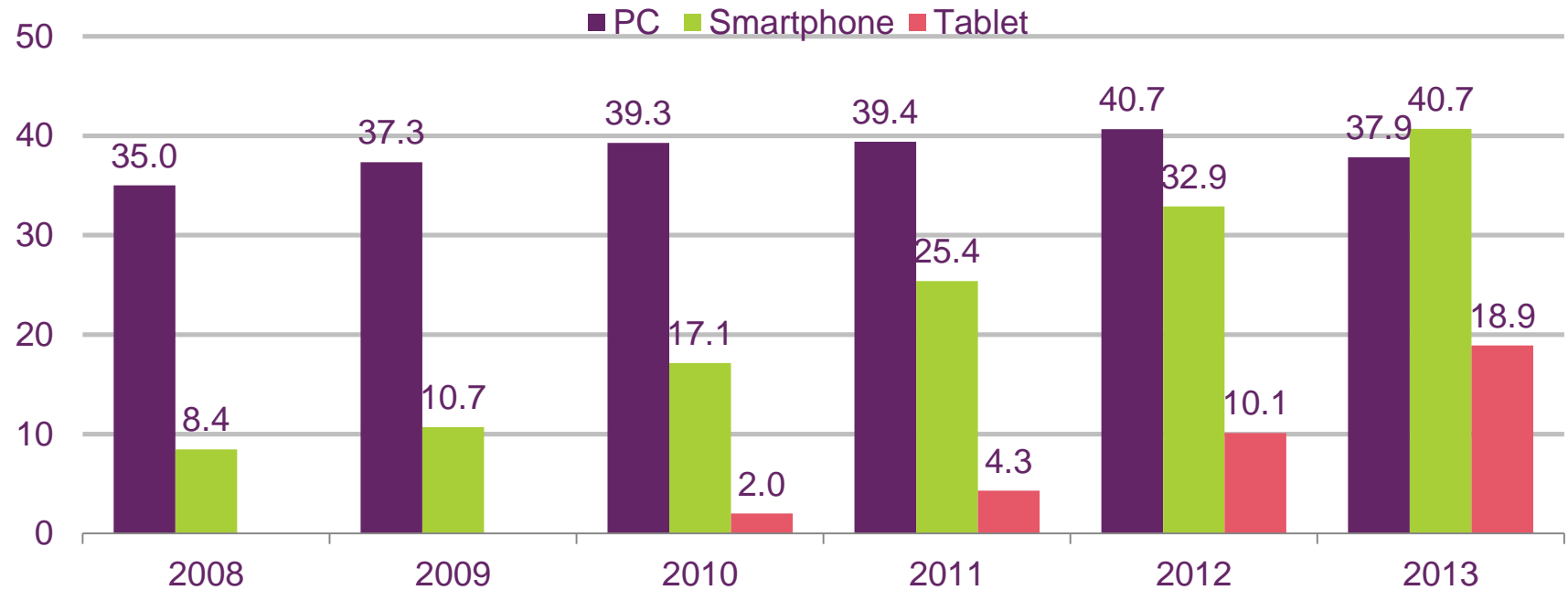
PSB review 2007 Q10 How often do you tend to use the internet? 2014 Q. TO10

Base: Residents with internet access

Figure 14

Internet users, by device (m)

Internet users 4+ (millions)



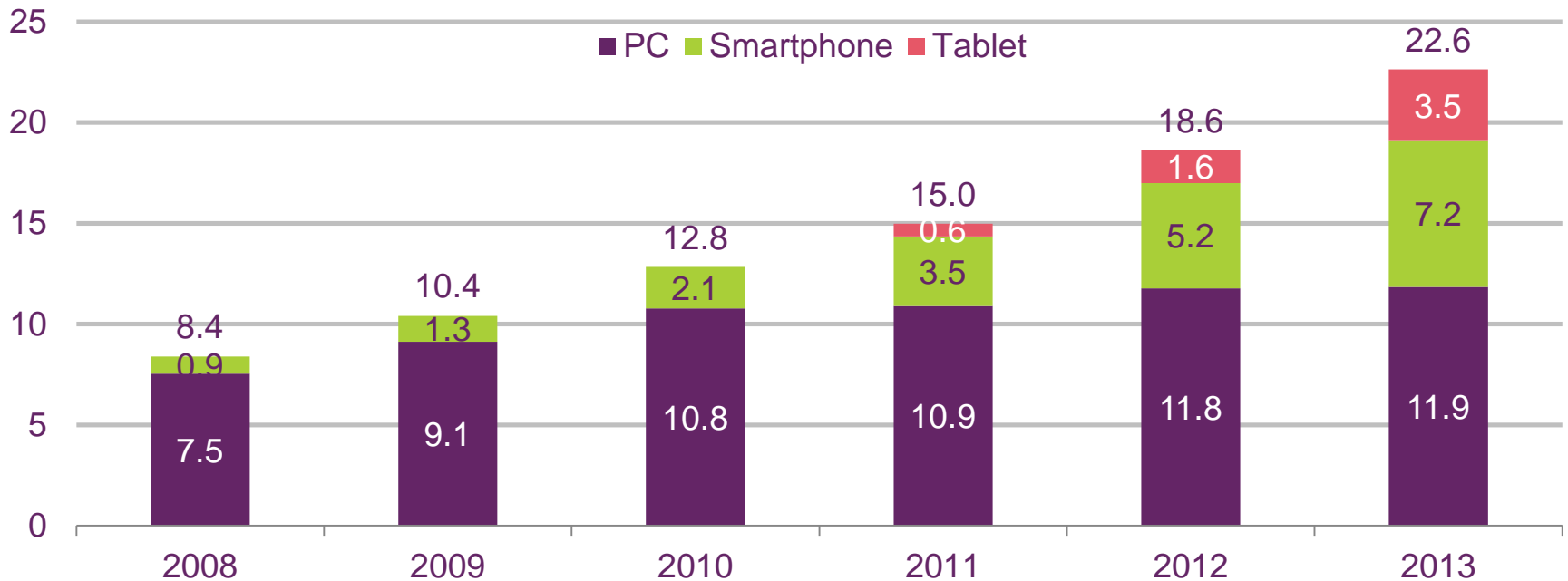
Source: Enders Analysis

Base: Internet users 4+

Figure 15

Total internet consumption

Hours (billions)



Source: Enders Analysis

Base: Internet users 4+, excludes offline app and TV-based consumption

Figure 16

Types of content for which the internet is a source: 2007 and 2014

Adults 16+ (%)



Source: Ofcom consumer research

PSB review 2007 Q12 And which of these different media would you say is a source for... ; PSB Review 2014 CPP1a .

Which of these different types of media available to you would you say you ever use as a source for...

* Question change between 2007 and 2014.** in 2014 asked as "relaxing and entertainment".

Online media services

Enders Analysis summary of the public service objectives

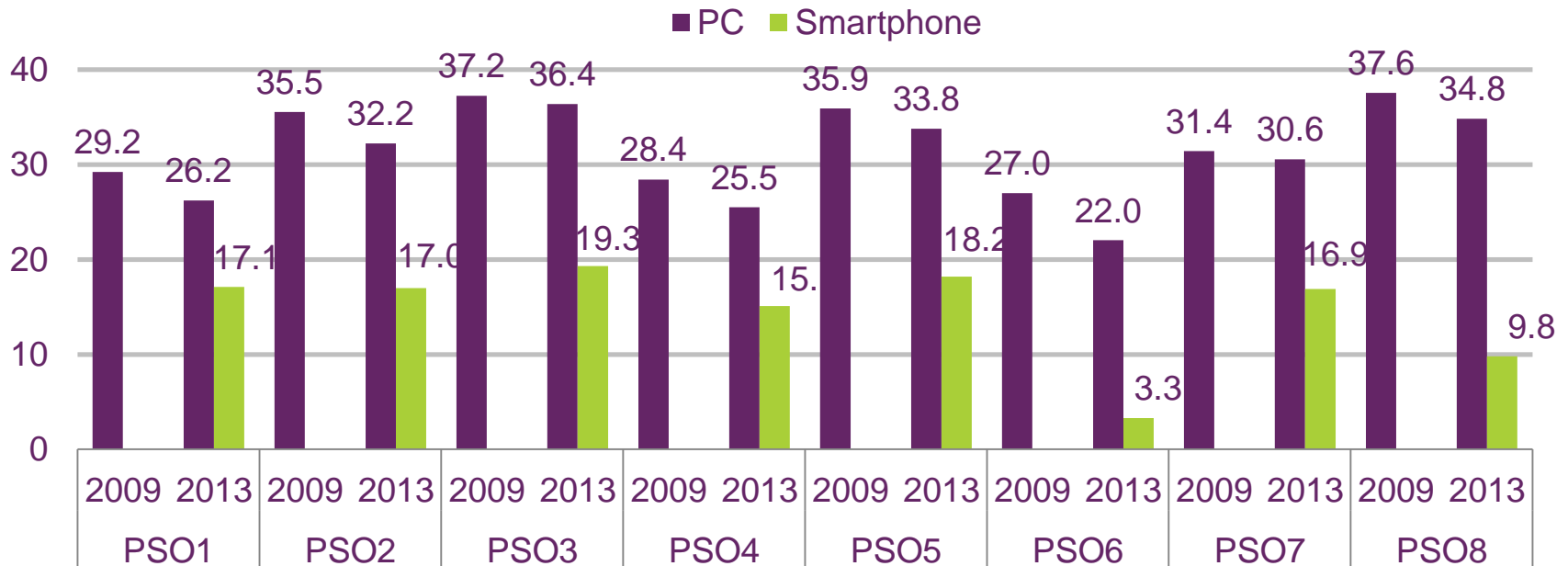
- PSO1 - Cultural activity: includes UK originated or financed drama or comedy content or in the case of music or visual or performing arts content, UK artists or events.
- PSO2 – News and current affairs: includes news and/or current affairs content
- PSO3 – Sports and leisure: provides sports and/or leisure interests content.
- PSO4 – Education: features educational or teaching material
- PSO5 – Factual programming: offers factual content, e.g. documentaries
- PSO6 – Religion: offers religious content or content related to beliefs
- PSO7 – Children’s and young people’s programming: provides original content for children or young people
- PSO8 – Community and regional: provides content for specific communities (UK or non-UK) or regions (UK only)

Source: How online media services have fulfilled the Public Service Objectives, Enders Analysis, September 2014

Figure 17

Internet audience accessing online media fulfilling each PSO, by device

Unique audience (millions)

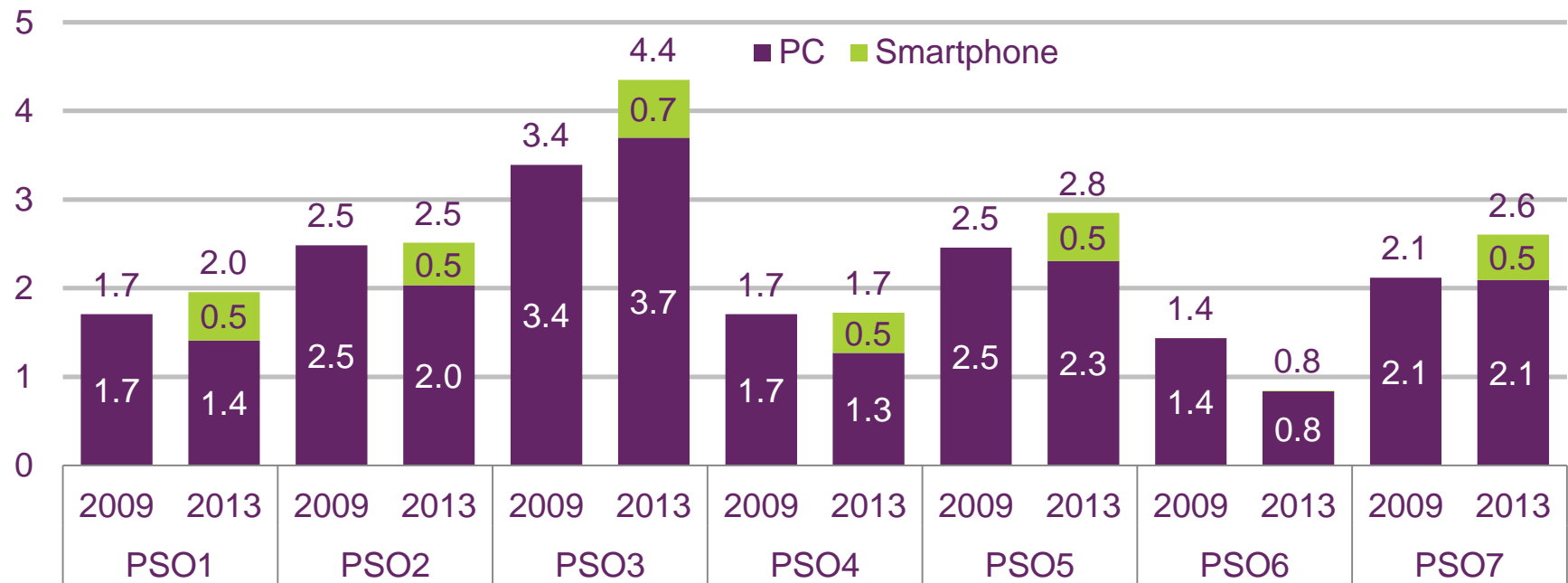


Source: Enders Analysis, comScore

Figure 18

Aggregate use of online media services on PC and smartphone, by PSO

Minutes (billions)



Source: Enders Analysis, comScore

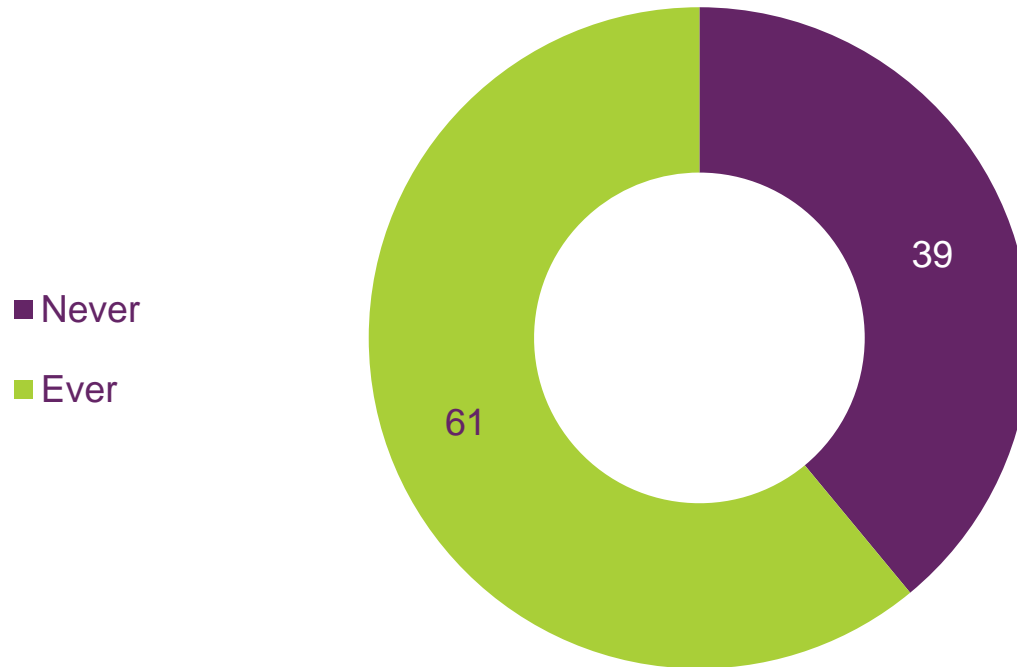
Note: Smartphone data unavailable for 2009. PSO8 increased substantially but excluded from this chart for reasons of legibility.

VOD services

Figure 19

Frequency of online/on-demand TV and film consumption

Adults 16+ (%)



Source: Ofcom quant research 2014

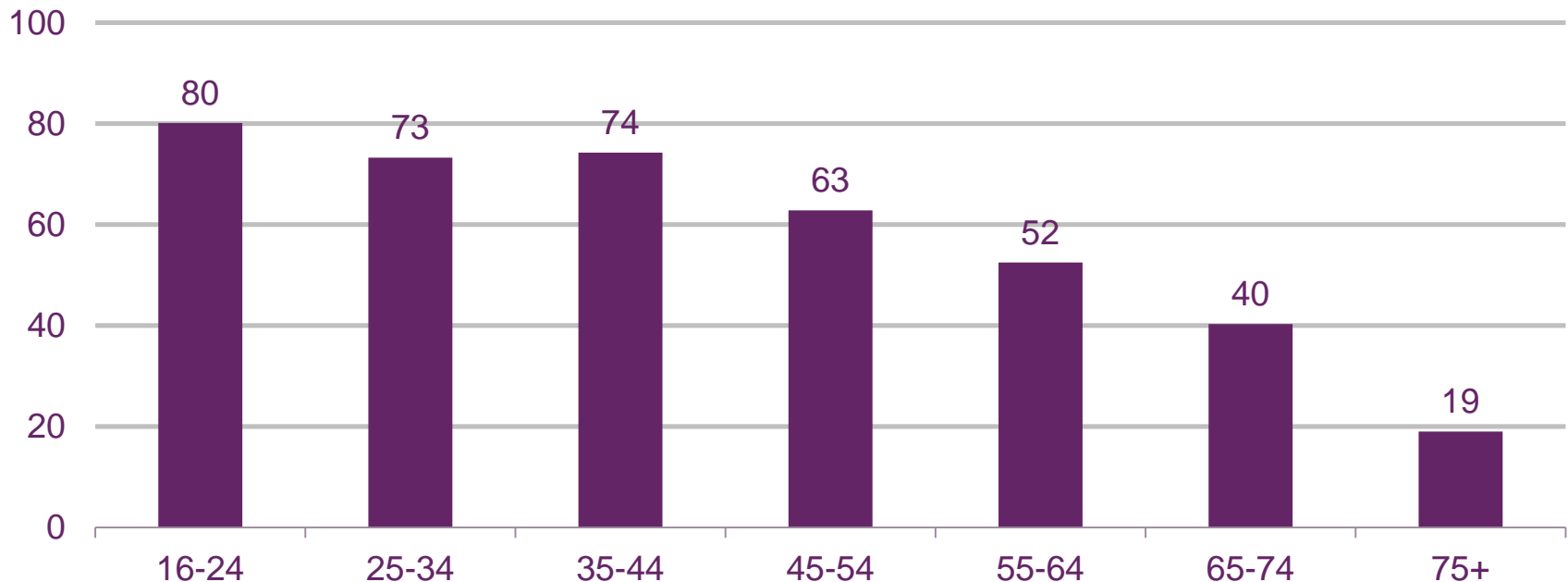
Base: Adults 16+ n=2026

TO12 How often, if at all, do you watch television programmes or films online or through an 'on demand service'?

Figure 20

Ever consumed TV or films online/on-demand, by age

All adults (%)



Source: Ofcom quant research

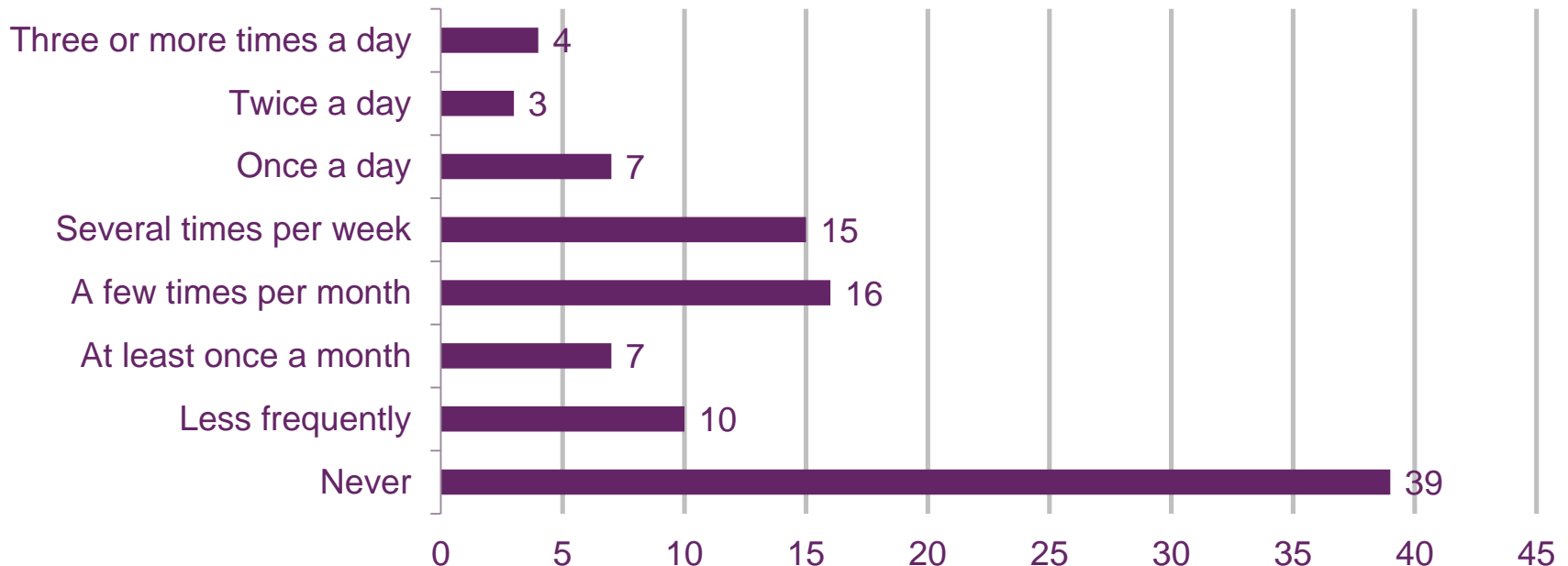
Base: All adults 16+ n=2026

TO12 How often, if at all, do you watch television programmes or films online or through an 'on demand service'?

Figure 21

Frequency of online/on-demand TV and film consumption

Adults 16+ (%)



Source: Ofcom Quant Research 2014

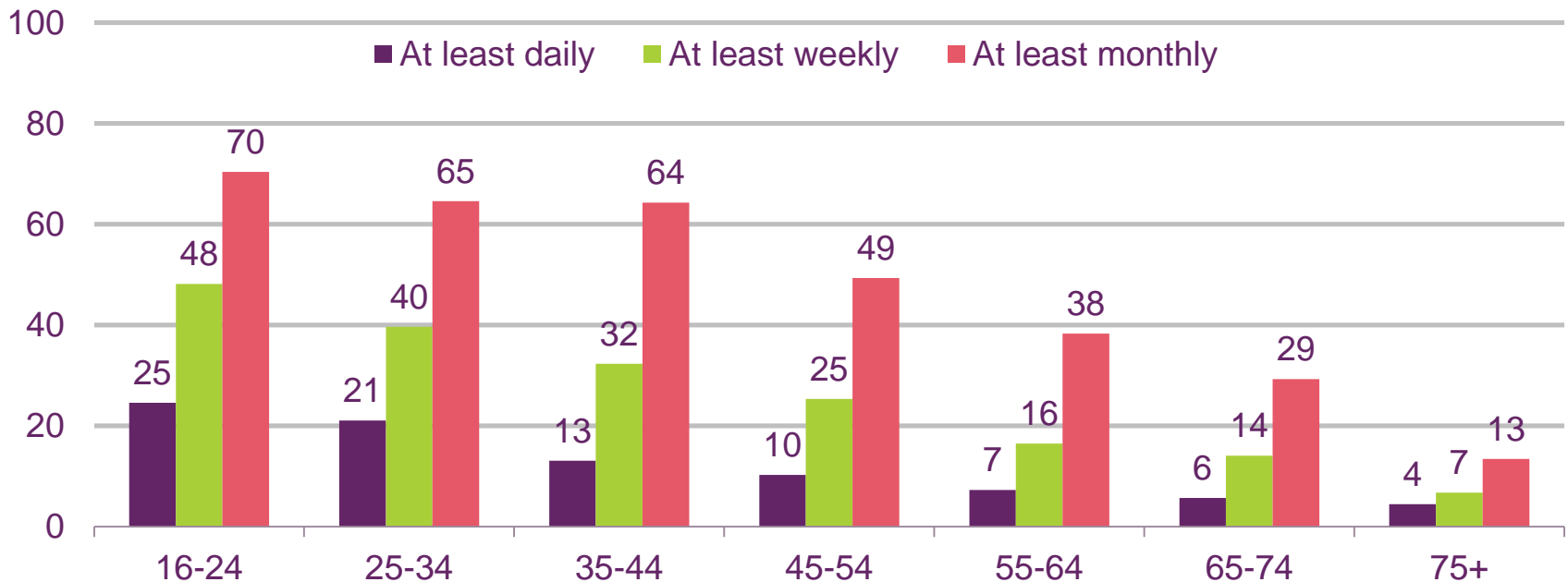
Base: Adults 16+ n=2026

TO12 How often, if at all, do you watch television programmes or films online or through an 'on demand service'?

Figure 22

Frequency of VOD service use, by age

All adults (%)



Source: Ofcom quant research

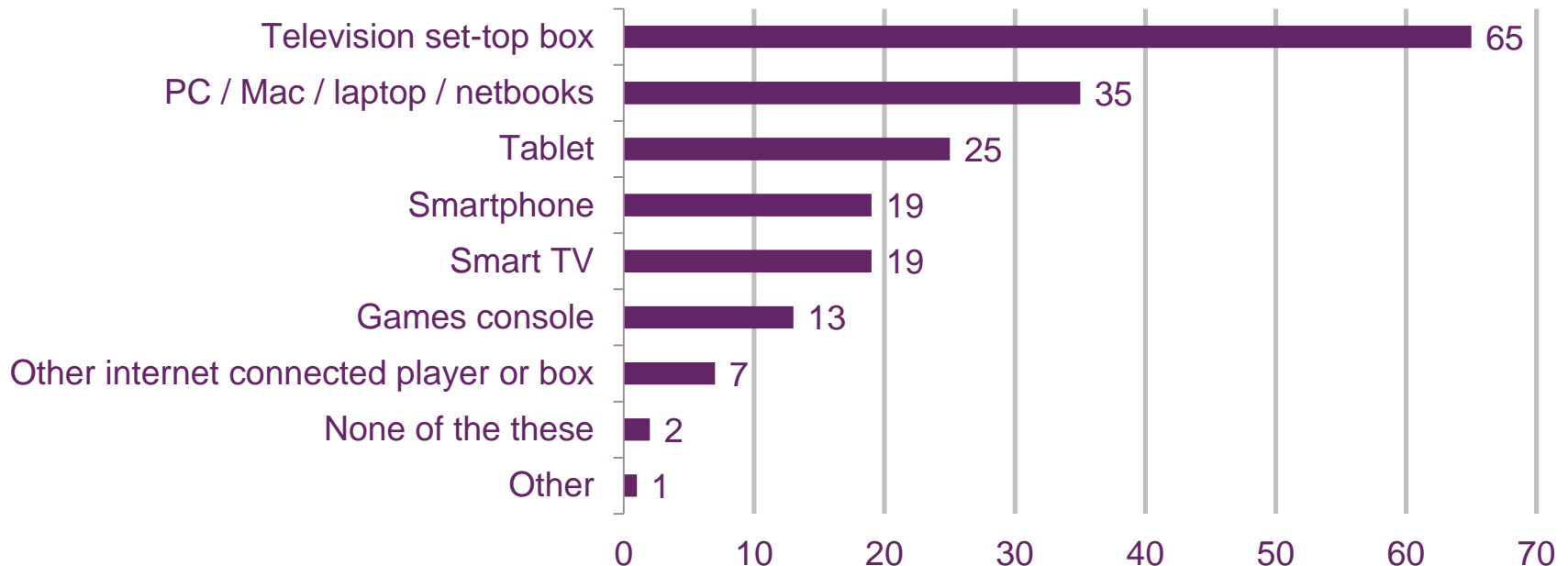
Base: All adults 16+ n=2026. 16-24 n=267; 25-34 n=309; 35-44 n=310; 45-54 n=373; 55-64 n=286; 65-74 n=278; 75+ n=202.

TO12 How often, if at all, do you watch television programmes or films online or through an 'on demand service'?

Figure 23

Device used for online/on-demand TV and film consumption

Online/on-demand consumers (%)



Source: Ofcom Quant Research 2014

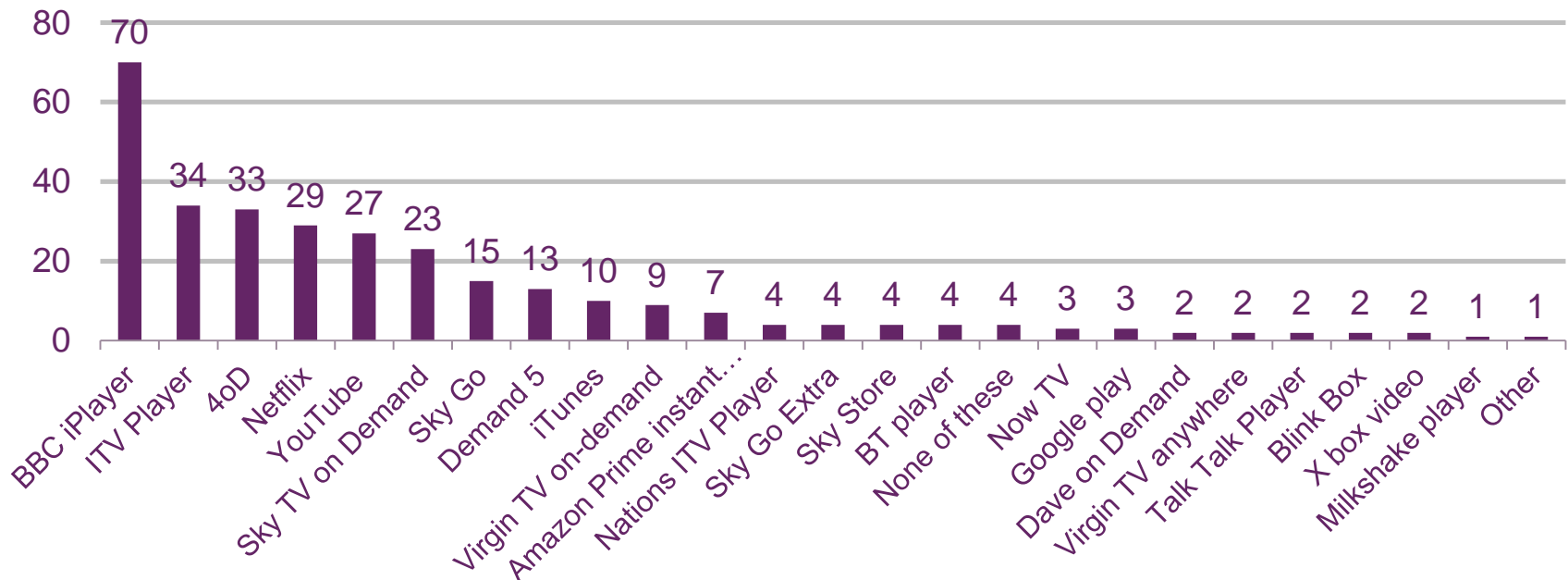
Base: Adults 16+ that use online/on-demand TV and film services n = 1229

TO13 And in which of these ways do you personally watch television programmes online or on demand at home or anywhere else? Again, please think about all the different ways you access this type of content.

Figure 24

VOD service used at least monthly

Monthly VOD service users (%)



Source: Ofcom Quant Research 2014

Base: Adults 16+ that use online/on-demand TV and film services at least once a month n = 990

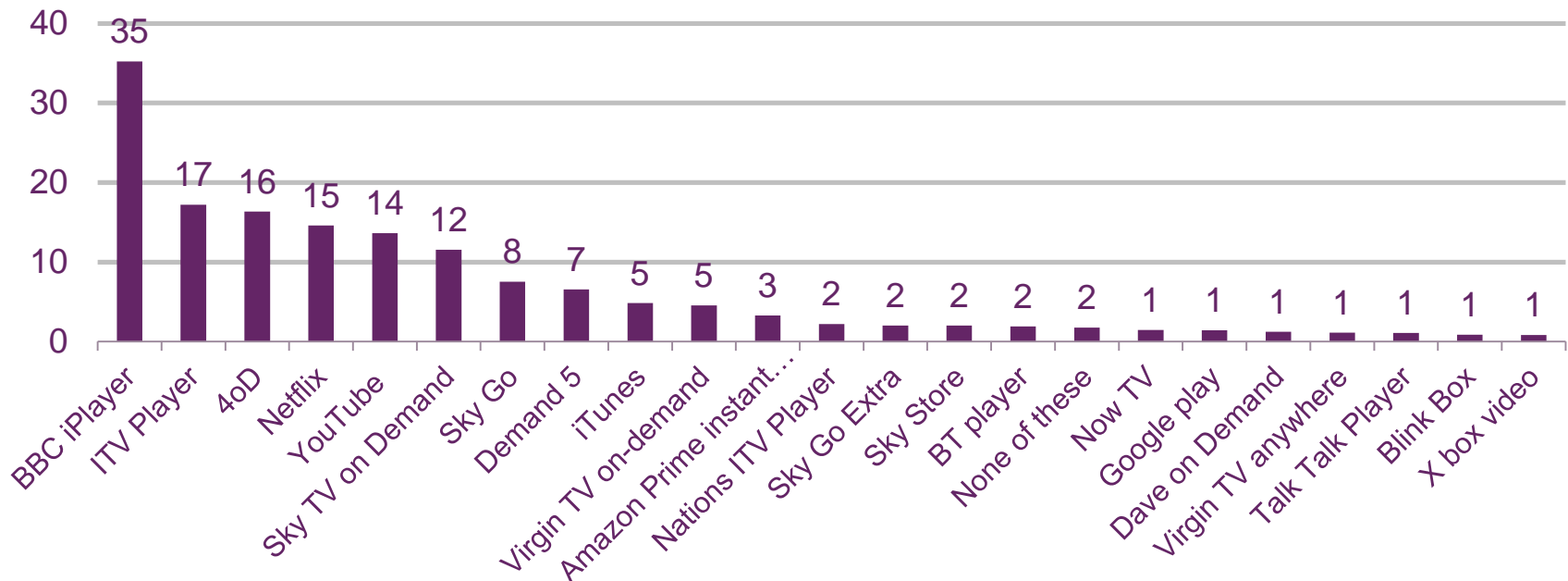
TO14 Which, if any, of the following services do you use to watch television programmes or films online or on demand?

Please tell me which services you use at least once a month or more often?

Figure 25

Service used for monthly online/on-demand TV and film consumption

All adults (%)



Source: Ofcom Quant Research 2014

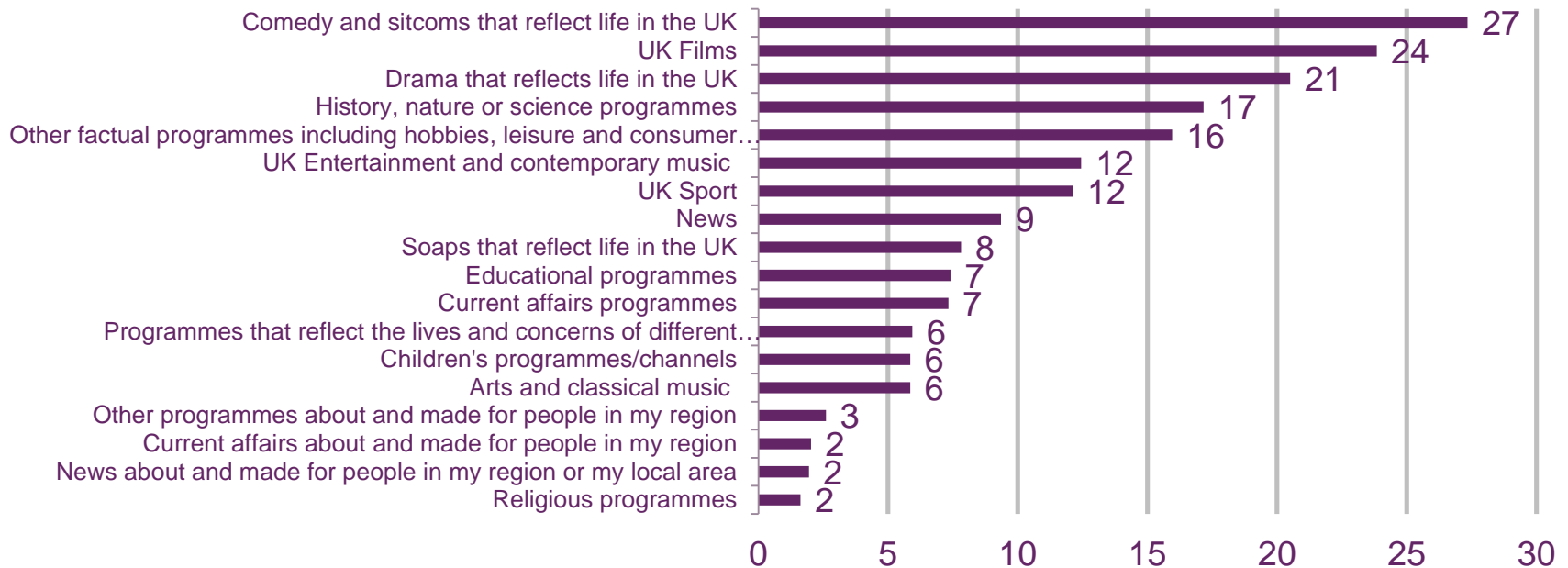
Base: All Adults 16+ n = 2026

TO14 Which, if any, of the following services do you use to watch television programmes or films online or on demand? Please tell me which services you use at least once a month or more often?

Figure 26

Use of any VOD service at least monthly, by genre

VOD service user (%)



Source: PSB 2014 Quant Research

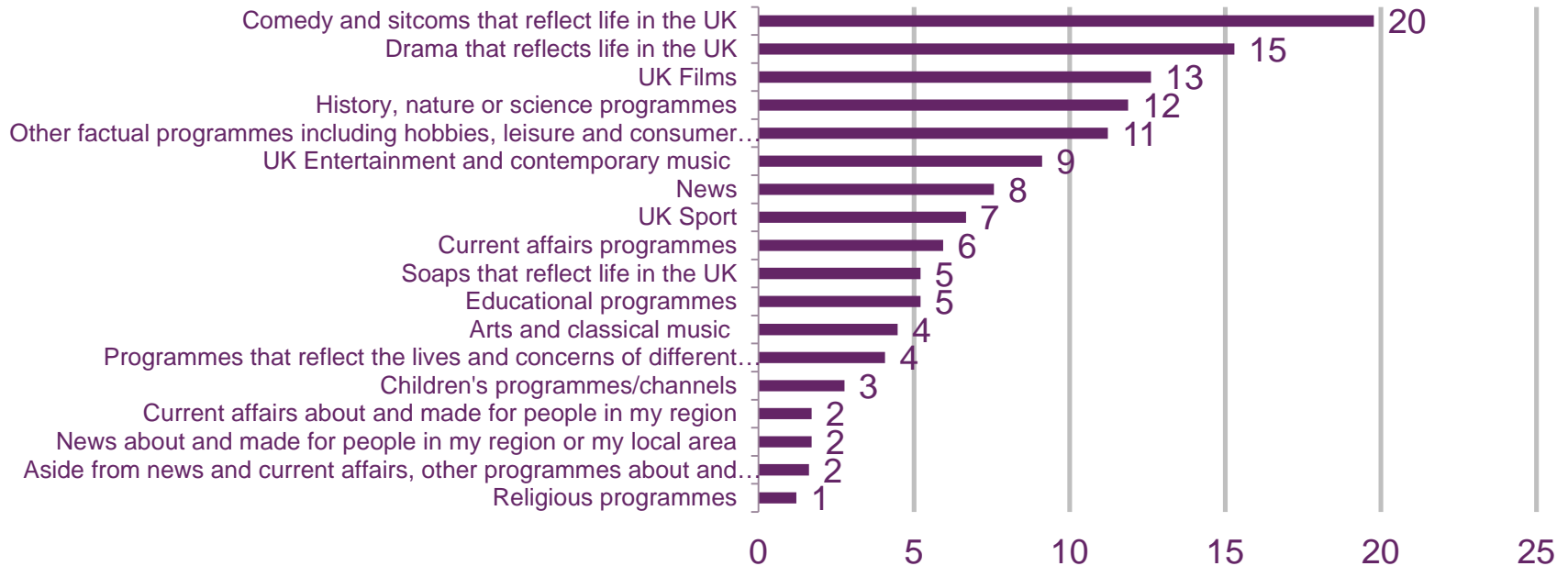
Base: All on-demand users 16+ as per Q. TO12 n=1229

CCP2b Which channels or media services do you use to watch this type of programme at least once a month or more often?

Figure 27

Use of PSB VOD services at least monthly, by genre

On-demand user (%)



Source: PSB 2014 Quant Research

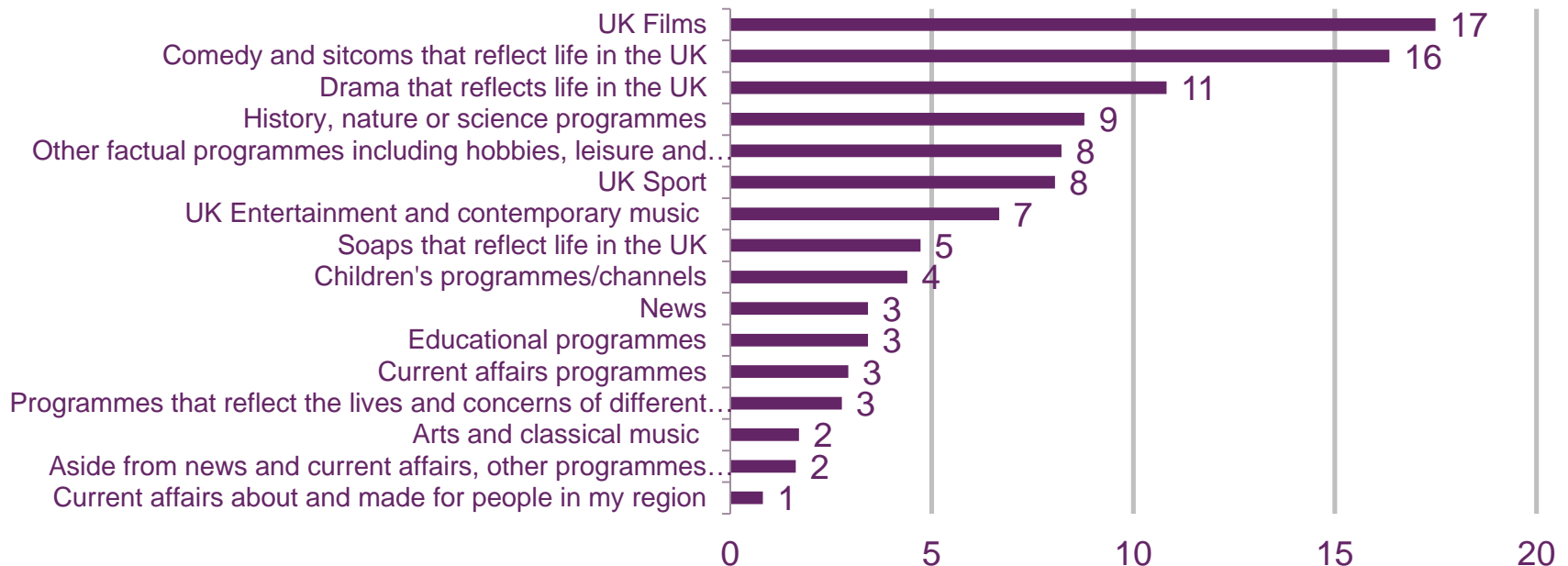
Base: All on-demand users 16+ as per Q. TO12 n=1229

CCP2b Which channels or media services do you use to watch this type of programme at least once a month or more often?

Figure 28

Use of other VOD services at least monthly, by genre

On-demand user (%)



Source: PSB 2014 Quant Research

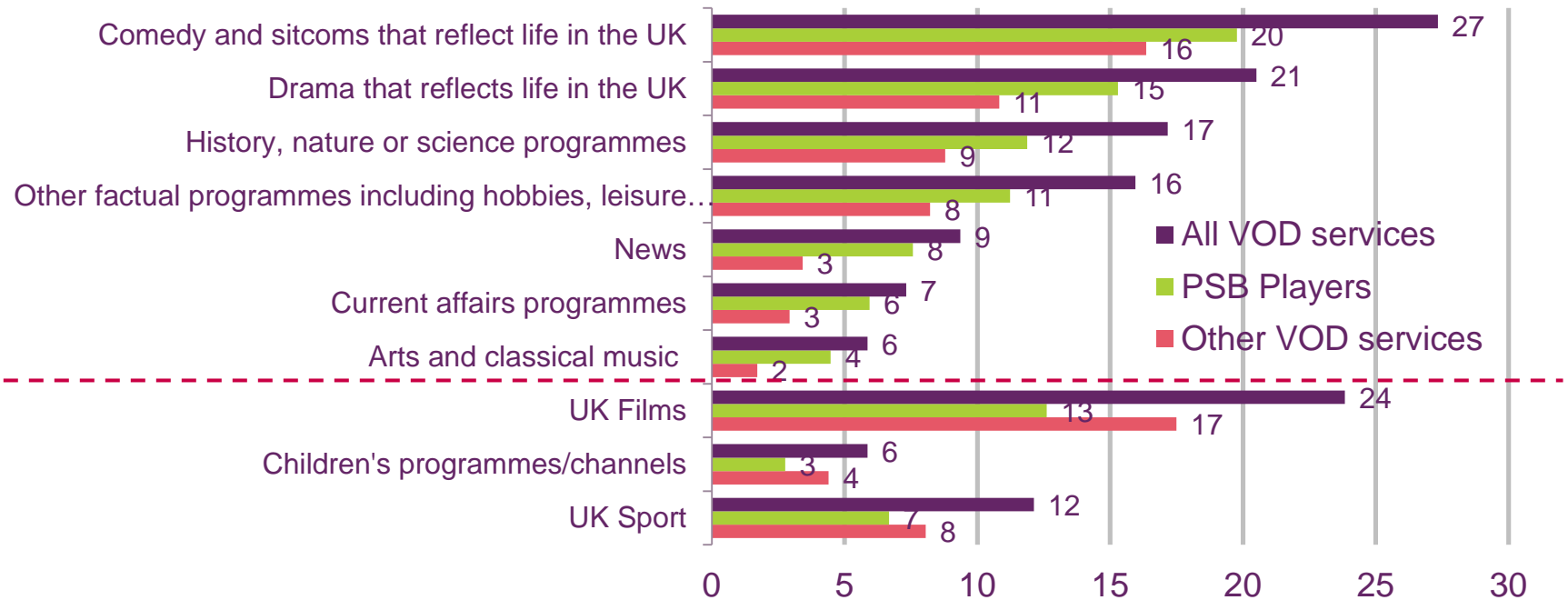
Base: All on-demand users 16+ as per Q. TO12 n=1229

CCP2b Which channels or media services do you use to watch this type of programme at least once a month or more often?

Figure 29

Differences between VOD services of monthly use, by genre

On-demand user (%)



Source: PSB 2014 Quant Research

Base: All on-demand users 16+ as per Q. TO12 n=1229

CCP2b Which channels or media services do you use to watch this type of programme at least once a month or more often?

Figure 30



PSB VOD service programme requests by genre: 2011-2013

Genre	2011		2012				2013			
	Requests	Genre share	Requests	YoY Growth	Genre share	Change in share	Requests	YoY Growth	Genre share	Change in share
Drama	685,503,179	31.0%	739,236,549	7.8%	29.1%	-1.9%	896,636,569	21.3%	29.4%	+0.3%
Entertainment and comedy	593,773,413	26.8%	715,160,109	20.4%	28.1%	+1.3%	773,402,942	8.1%	25.4%	-2.8%
Factual	456,621,913	20.6%	476,667,273	4.4%	18.8%	-1.9%	584,354,879	22.6%	19.2%	+0.4%
Children's	280,289,260	12.7%	381,912,331	36.3%	15.0%	+2.4%	534,951,291	40.1%	17.5%	+2.5%
Films	46,889,221	2.1%	59,637,454	27.2%	2.3%	+0.2%	66,563,210	11.6%	2.2%	-0.2%
Sport	40,016,083	1.8%	58,698,044	46.7%	2.3%	+0.5%	56,204,332	-4.2%	1.8%	-0.5%
Current affairs	46,343,238	2.1%	51,661,339	11.5%	2.0%	-0.1%	50,140,603	-2.9%	1.6%	-0.4%
Arts and classical music	21,922,094	1.0%	24,519,270	11.8%	1.0%	-	33,308,885	35.8%	1.1%	+0.1%
Education	12,121,425	0.5%	13,577,514	12.0%	0.5%	-	25,285,581	86.2%	0.8%	+0.3%
News	10,022,536	0.5%	12,509,886	24.8%	0.5%	-	15,180,808	21.4%	0.5%	-
Religious	6,097,652	0.3%	5,250,956	-13.9%	0.2%	-0.1%	8,460,834	61.1%	0.3%	+0.1%
Other	13,361,841	0.6%	2,046,576	-84.7%	0.1%	-0.5%	4,976,063	143.1%	0.2%	+0.1%
Total	2,212,961,855		2,540,877,301	14.8%			3,049,465,997	20.0%		

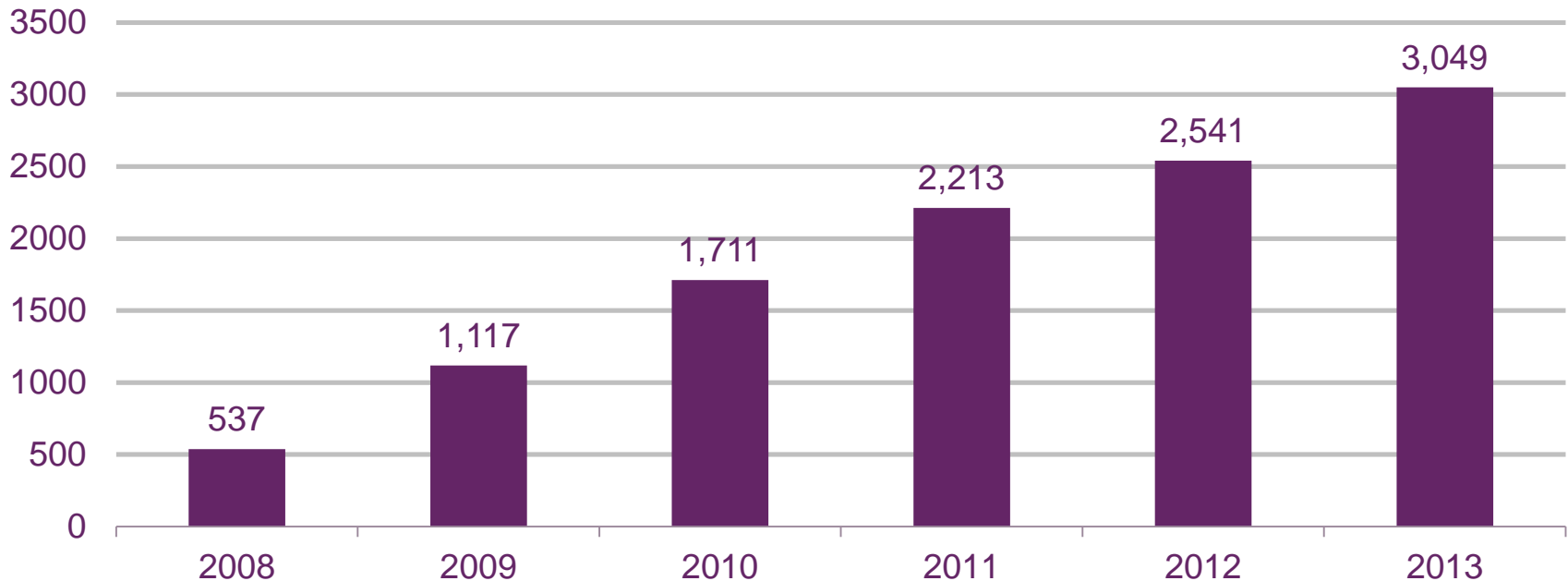
Source: Broadcaster data

Note: on-demand programmes only, no simulcast data is included. Offline downloads are counted as one request.

Figure 31

PSB VOD service programme requests: 2008-2013

Requests (millions)



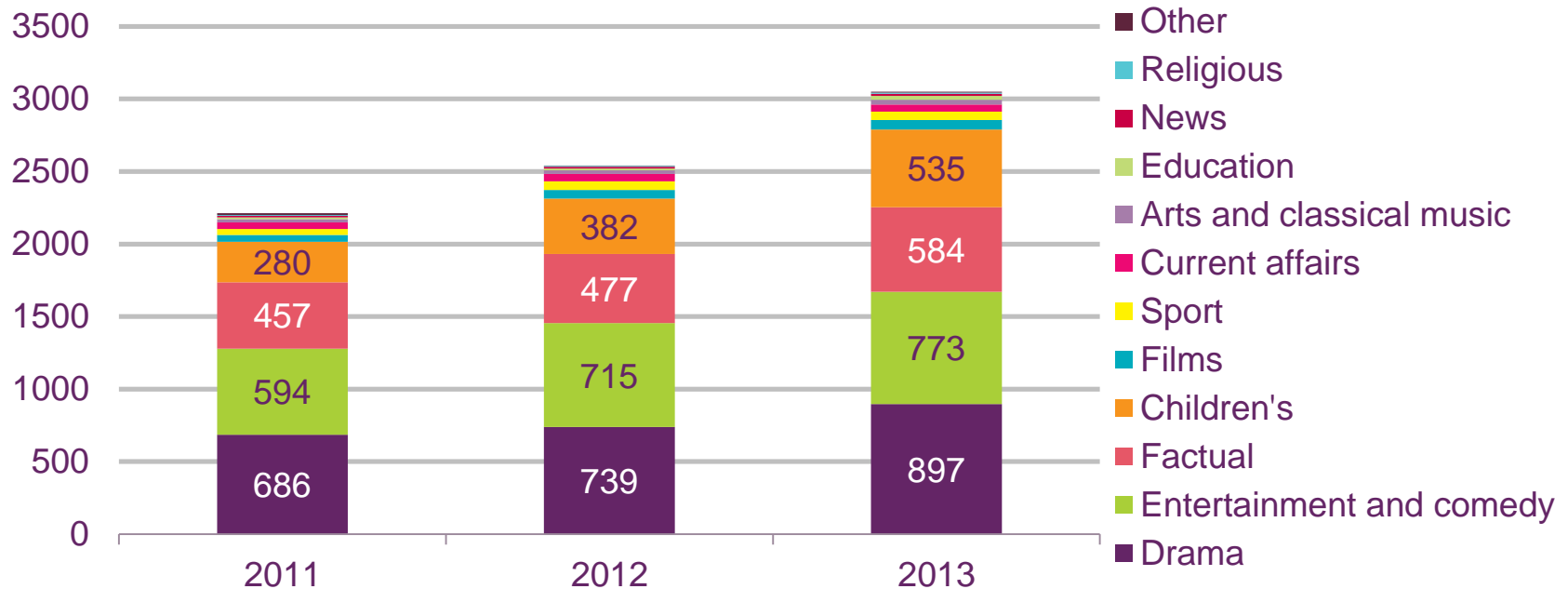
Source: Broadcaster data

Note: on-demand programmes only, no simulcast data is included. Offline downloads are counted as one request.

Figure 32

PSB on-demand programme service requests, by genre: 2011-2013

Requests (millions)

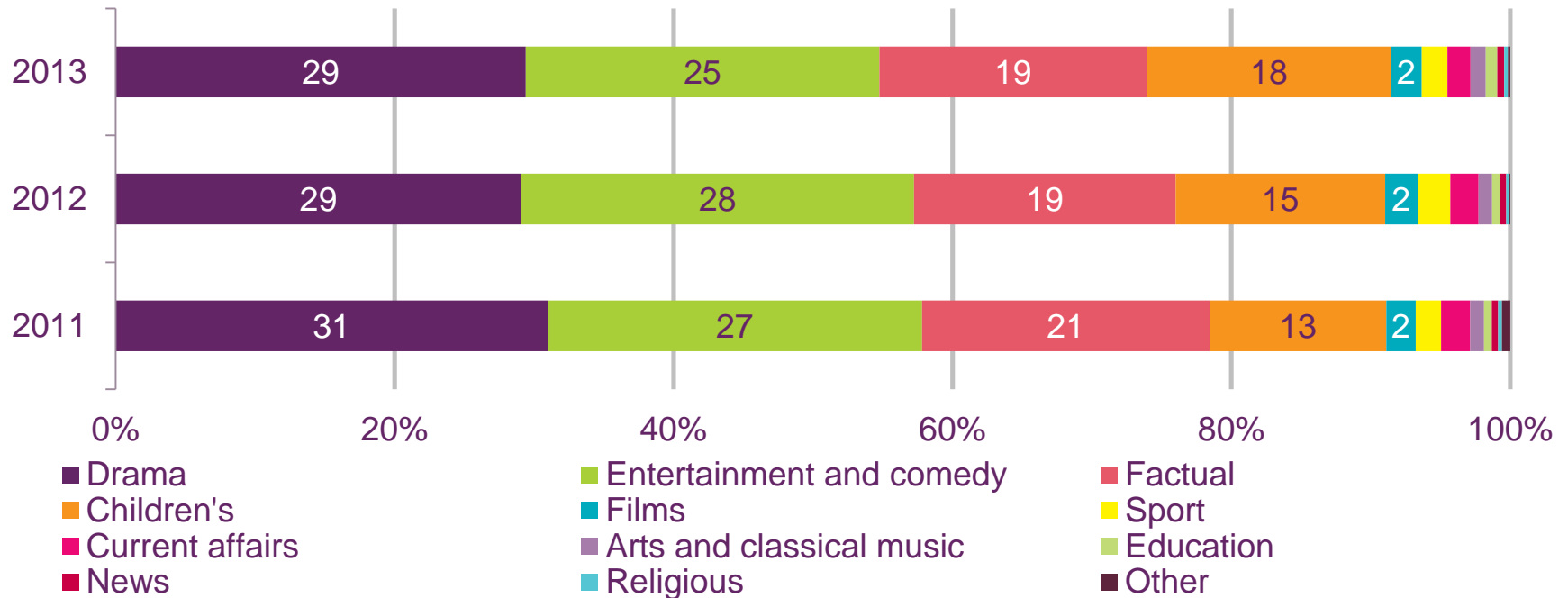


Source: Broadcaster data

Figure 33

PSB on-demand programme service requests, by genre: 2011-2013

Share of requests (%)

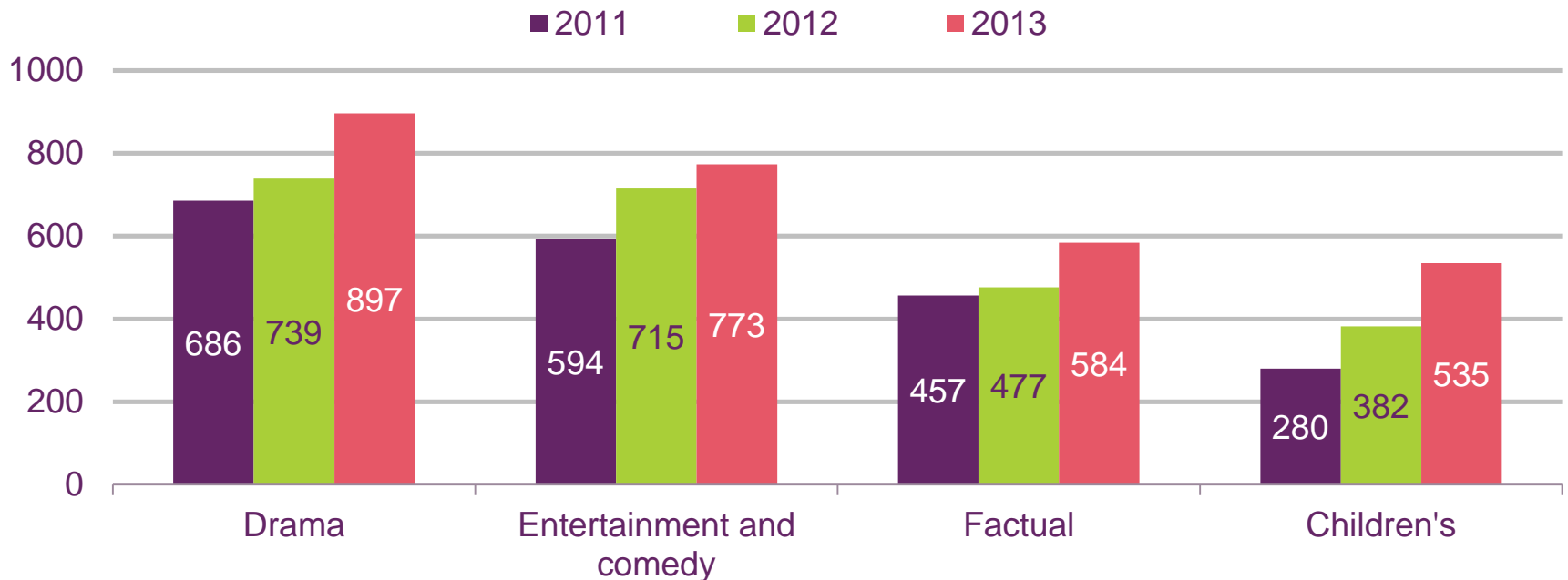


Source: Broadcaster data

Figure 34

PSB on-demand programme service requests, by genre: 2011-2013

Requests (millions)

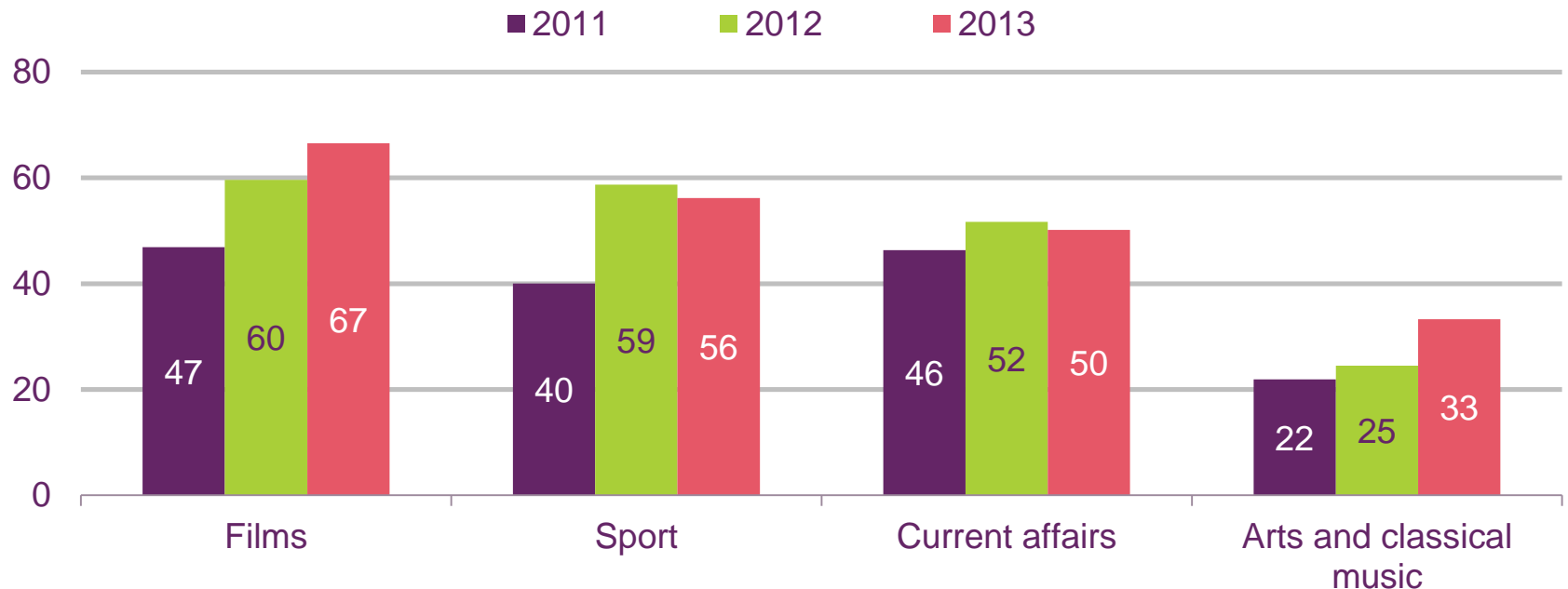


Source: Broadcaster data

Figure 35

PSB on-demand programme service requests, by genre: 2011-2013

Requests (millions)

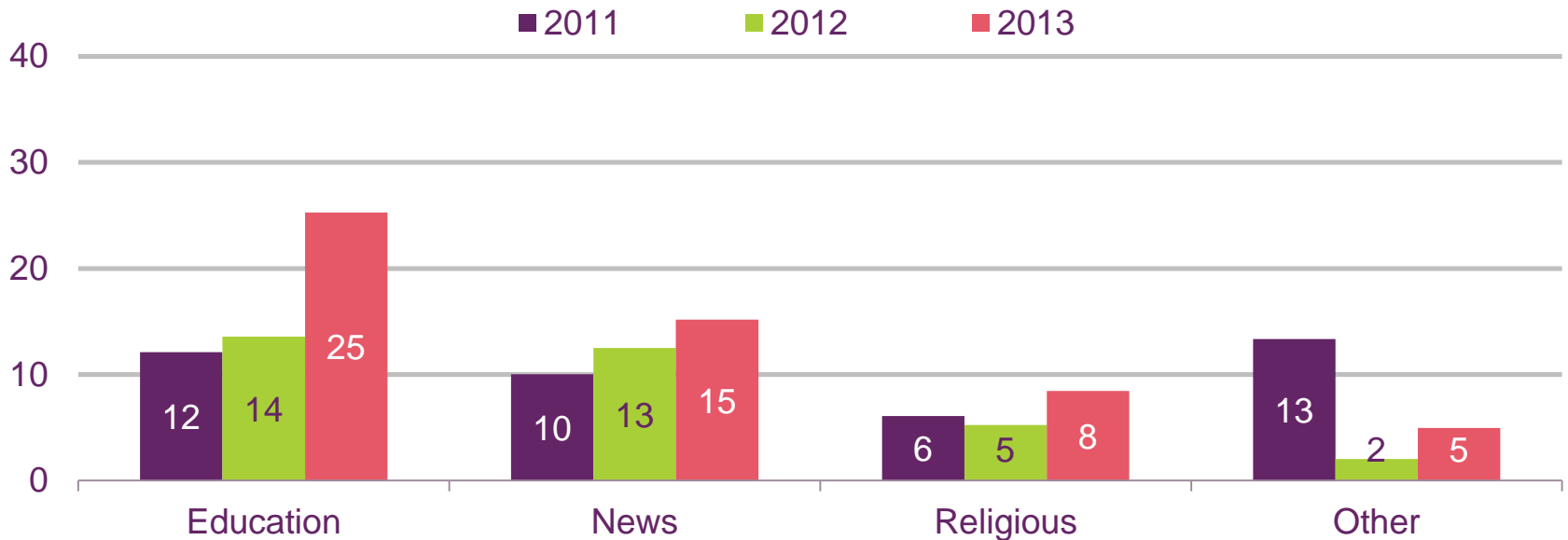


Source: Broadcaster data

Figure 36

PSB on-demand programme service requests, by genre: 2011-2013

Requests (millions)



Source: Broadcaster data

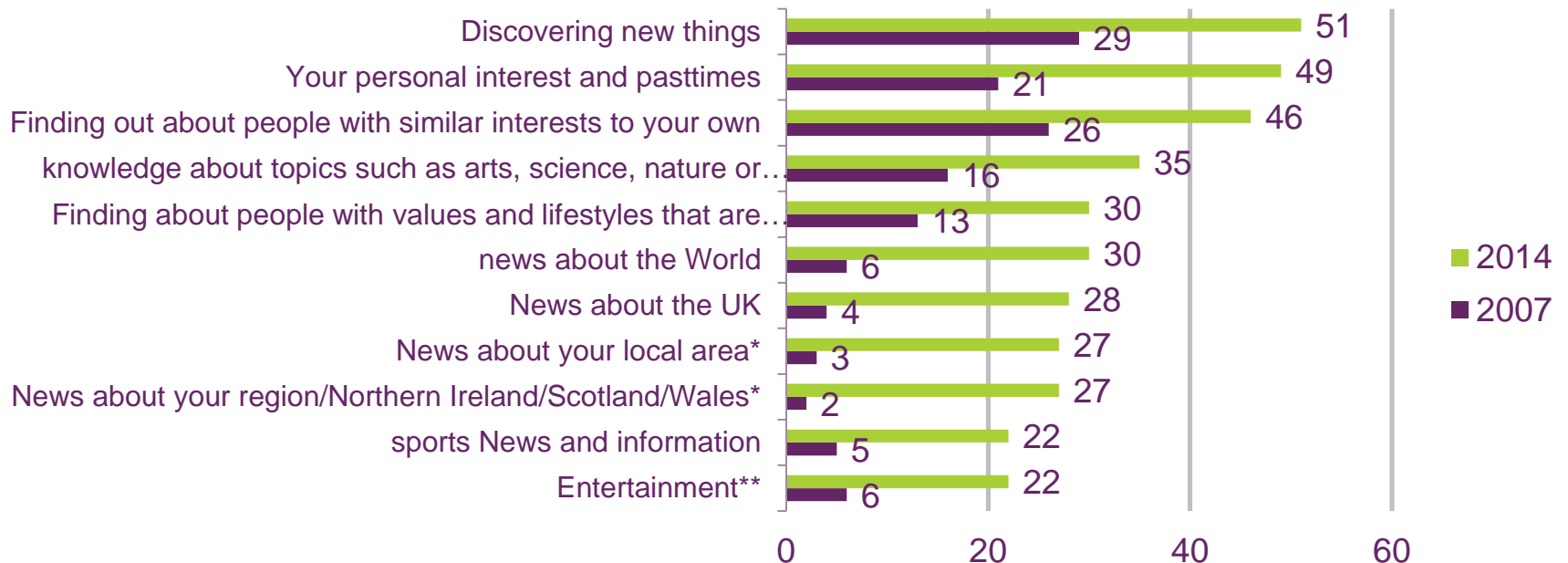
Note: Other data includes requests for programmes that did not meet the specifications of the other genres, or for which there was not enough meta data to assign the request to a genre.

ATTITUDES AND OPINIONS

Figure 37

Types of content for which the internet is the main source: 2007 and 2014

Adults 16+ (%)



Source: Ofcom consumer research

PSB review 2007 Q12 And which of these different media would you say is your main source for...

PSB Review 2014 CPP1b Which one of these is your most important source for this content?

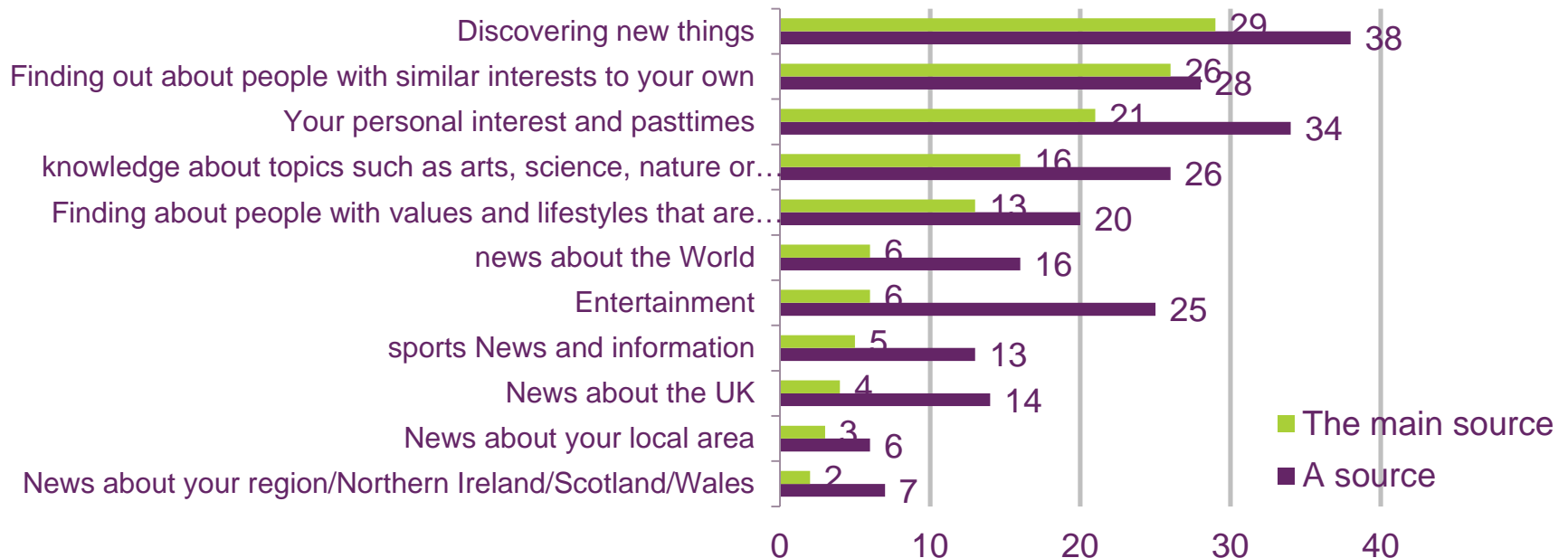
* In 2014 asked as "Finding out news about what's happening in your region or locally?"

** in 2014 asked as "relaxing and entertainment".

Figure 38

Types of content the internet is a source for, and the main source for in 2007

Adults 16+ (%)



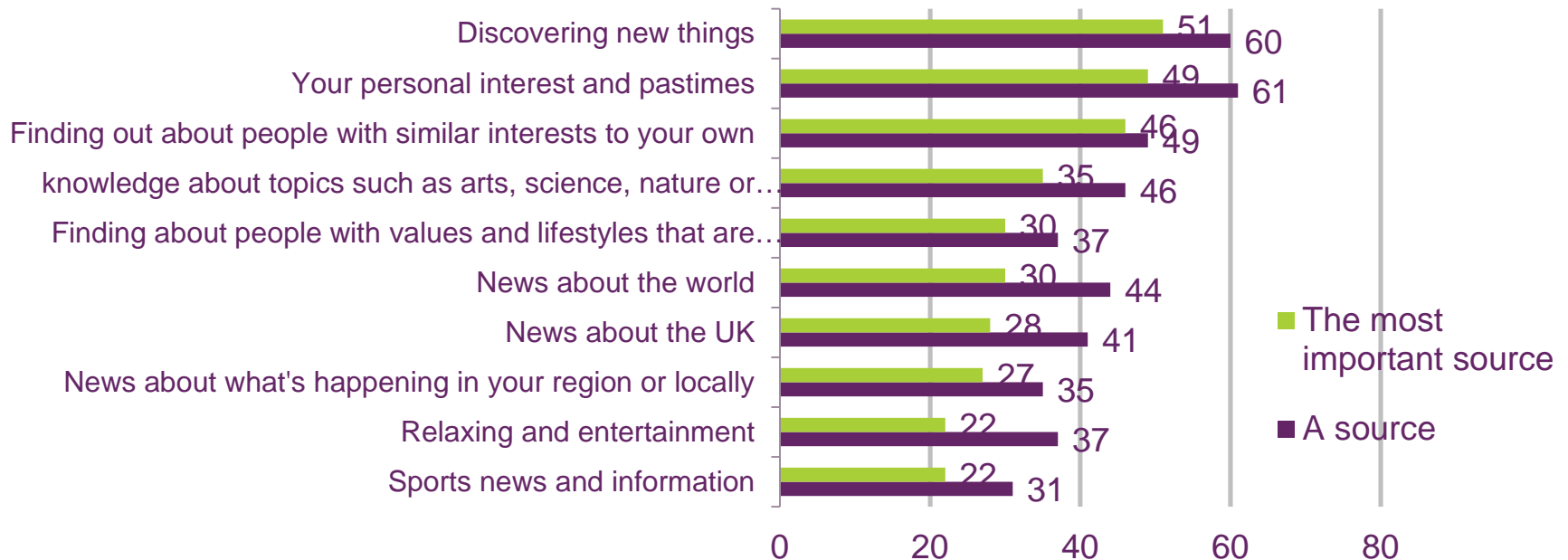
Source: Ofcom consumer research

PSB review 2007 Q11 Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for... Q12 And which of these different media would you say is your main source for...

Figure 39

Types of content the internet is a source for, and the most important source for in 2014

Adults 16+ (%)



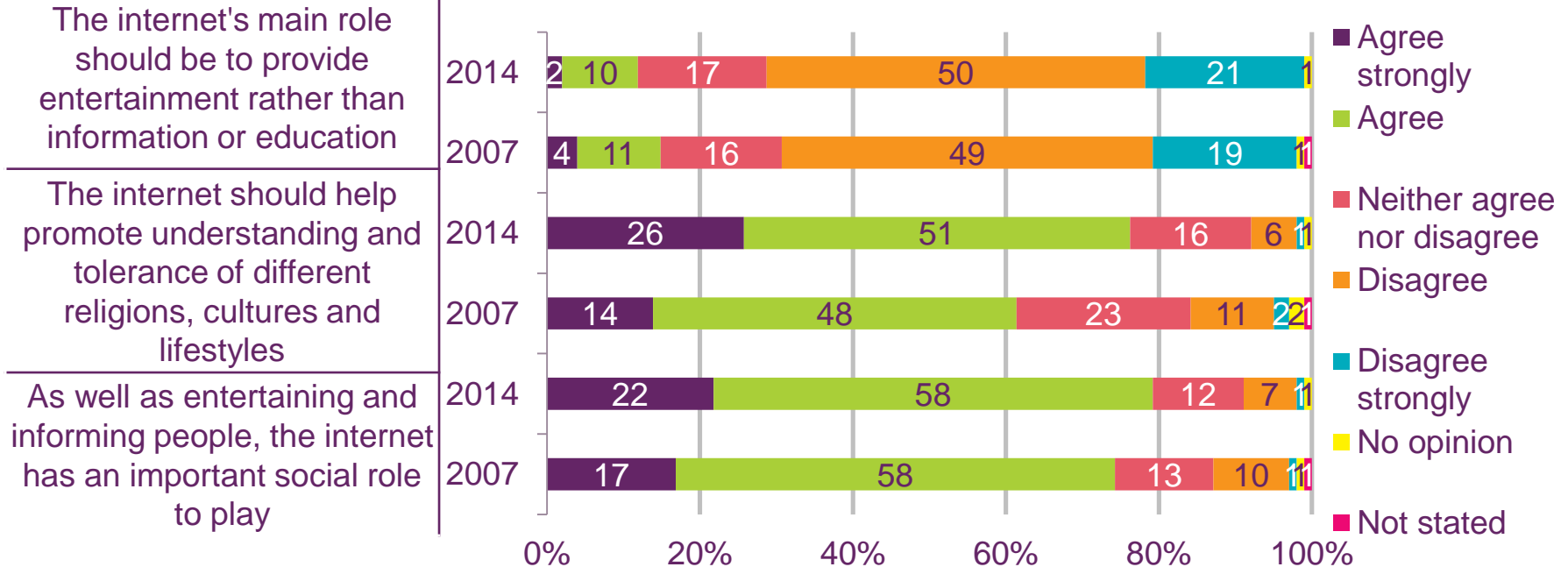
Source: Ofcom consumer research

PSB review 2007 Q11 Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for... Q12 And which of these different media would you say is your main source for...

Figure 40

Attitudes about the internet: 2007 and 2014

Adults with internet access 16+ (%)



Source: Ofcom consumer research

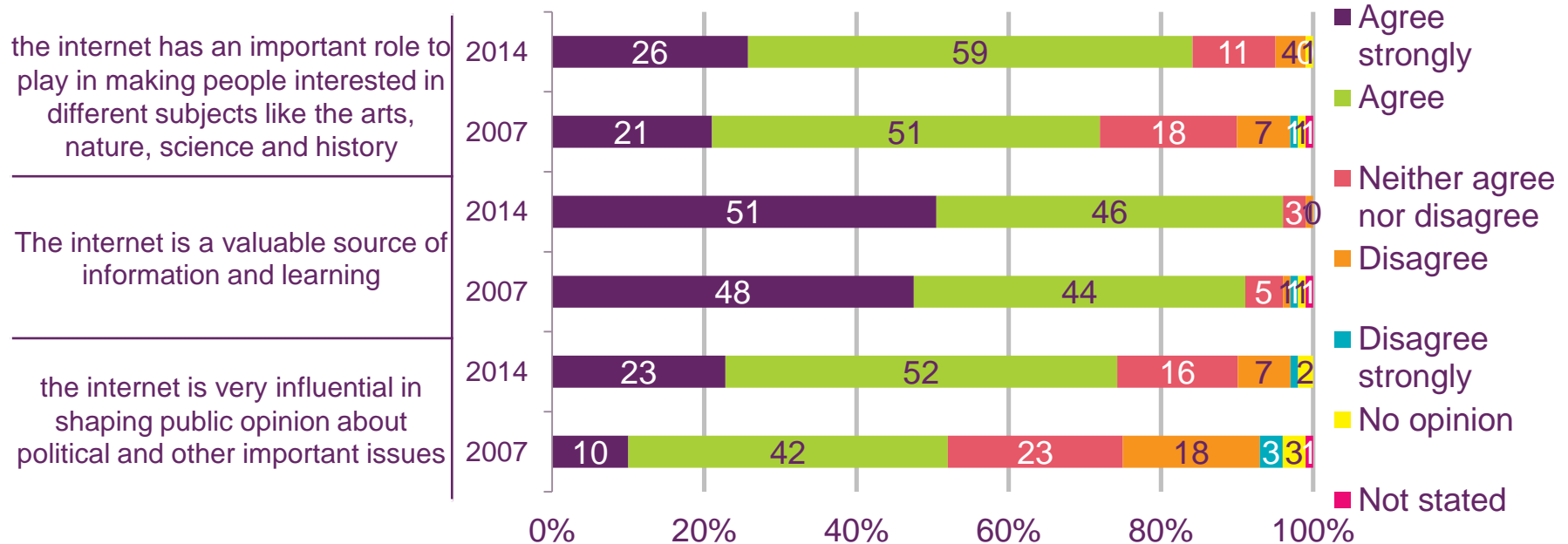
PSB Review 2007 Q15; PSB Review 2014 AT2. And to what extent do you agree or disagree with each of the following statements about the internet?

Base: Adults with internet access 16+ (%)

Figure 41

Attitudes about the internet: 2007 and 2014

Adults with internet access 16+ (%)



Source: Ofcom consumer research

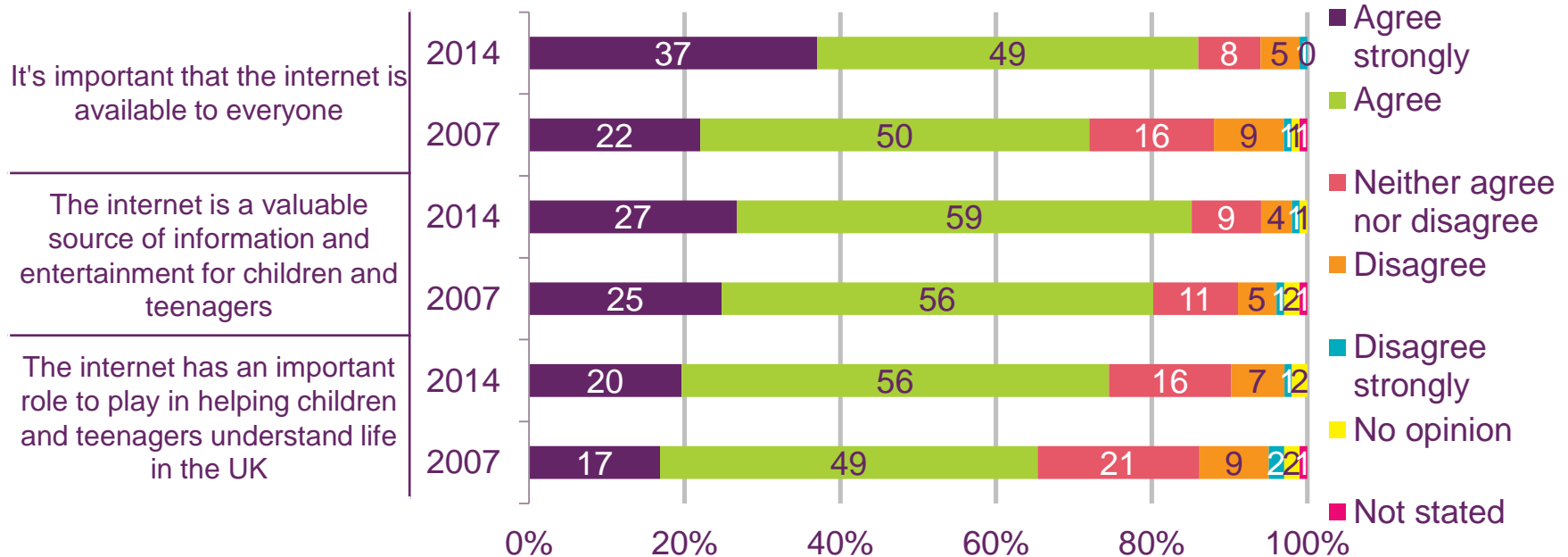
PSB Review 2007 Q15 And to what extent do you agree or disagree with each of the following statements about the internet?

Base: Adults with internet access 16+ (%)

Figure 42

Attitudes about the internet: 2007 and 2014

Adults with internet access 16+ (%)



Source: Ofcom consumer research

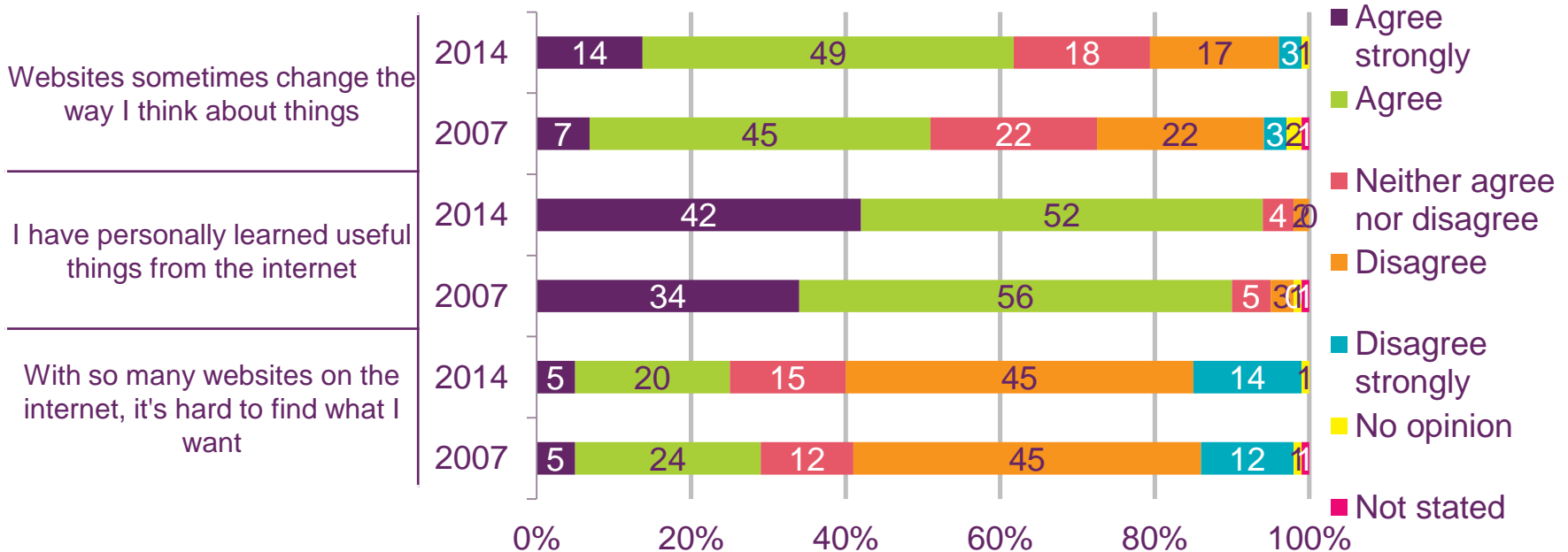
PSB Review 2007 Q15 And to what extent do you agree or disagree with each of the following statements about the internet?

Base: Adults with internet access 16+ (%)

Figure 43

Attitudes about the internet: 2007

Adults with internet access 16+ (%)



Source: Ofcom consumer research

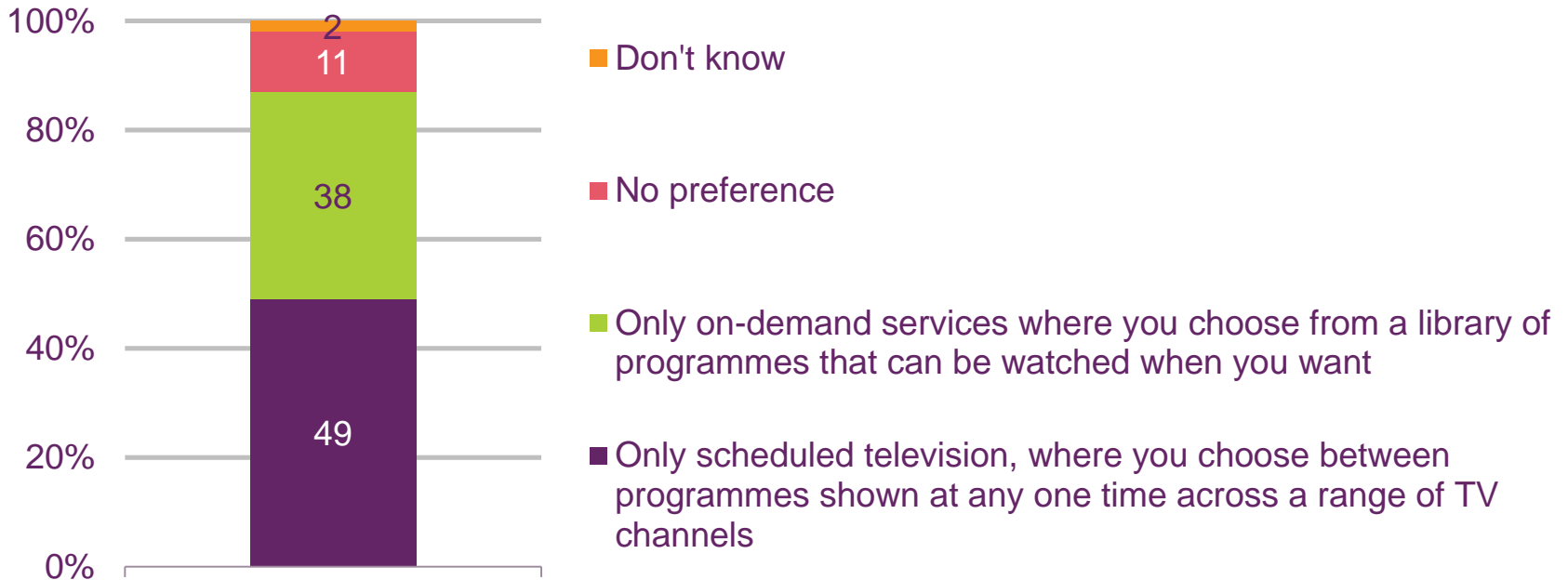
PSB Review 2007 Q15 And to what extent do you agree or disagree with each of the following statements about the internet?

Base: Adults with internet access 16+ (%)

Figure 44

Scheduled television vs. on-demand television

All adults 16+ (%)



Source: 2014 research

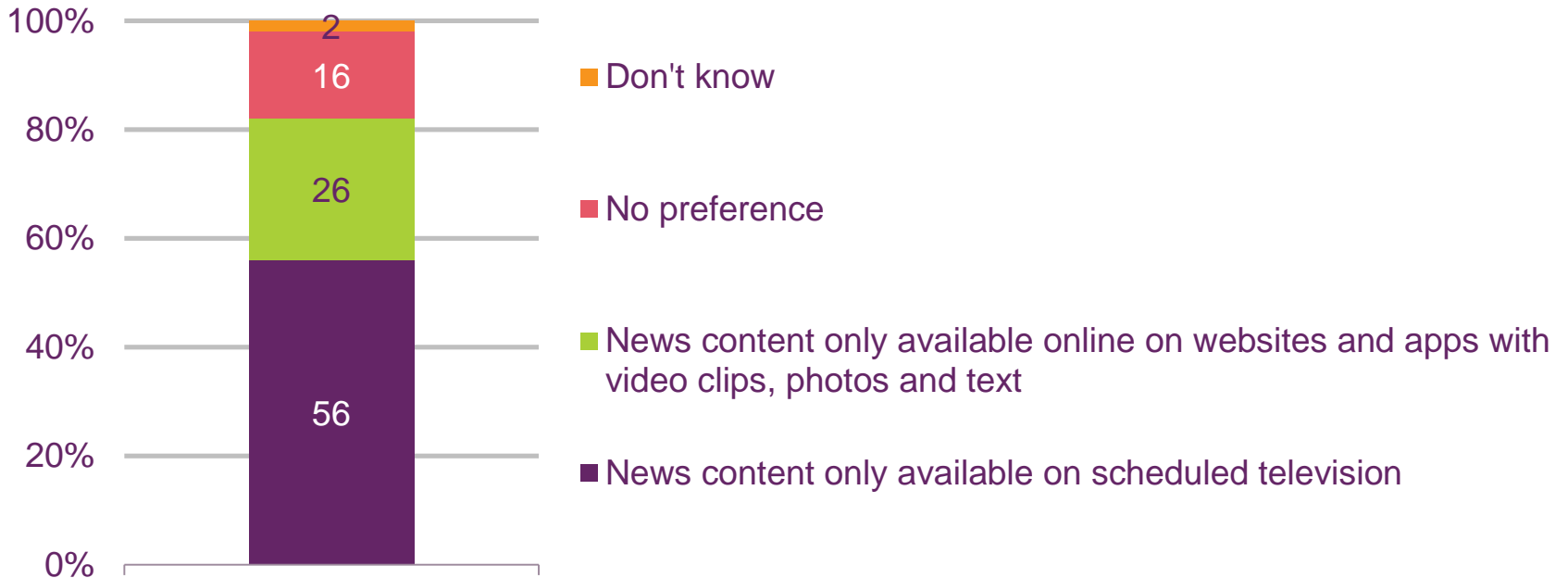
Base: All adults 16+ n = 2026

HCP2 Would you most like to see [A] or [B]?

Figure 45

TV news vs. online news

All adults 16+ (%)



Source: 2014 research

Base: All adults 16+ n = 2026

HCP4 Thinking about news content produced by the BBC, Channel 4 and Channel 5, would you most like to see [A] or [B]?