



The London 2012 Olympic Games: media consumption

Research Report

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CONTENTS

The London 2012 Games: media consumption	3
1.1.1 Introduction	3
1.1.2 Key points	4
1.1.3 Television audiences during the Games	5
1.1.4 Take-up of communications devices and services	9
1.1.5 The international market during the Games	15

The London 2012 Games: media consumption

1.1.1 Introduction

Between 27 July and 9 September 2012, London hosted the Games of the XXX Olympiad and the XIV Paralympiad.

Prior to the Games, Ofcom undertook consumer research on people's intentions to follow the Games; which it published in August of 2012 in the *Communications Market Report 2012*¹.

Following the Games, Ofcom commissioned new consumer research into UK adults' consumption of the Games on different media and devices, and their reasons for using specific devices. This report presents findings from the research, together with analysis of people's viewing behaviour, using data from the Broadcast Audience Research Board (BARB). This report forms a part of the research that is presented in the *International Communications Market Report 2012*² and the *Ofcom and the London 2012 Olympic and Paralympic Games report*³.

The London 2012 Games opened to a UK communications market that had developed considerably since previous Games in Beijing and Athens. During the 2012 Games consumers had increased choice in how and when they could follow the Games. There was greater take-up of smart devices, while social networks, and broadband played larger roles this time round.

With near universal coverage, UK audiences to the 2012 Olympic Games were higher than figures recorded for previous Games. The opening and closing ceremonies attracted much larger audiences in 2012 than for previous Olympic Games, and equally impressive numbers tuned in to watch the stars of track and field perform. Traditional television broadcasting was the main means of experiencing the Games, but digital methods were also widely used, especially by younger consumers. While television was considered a convenient and high-quality method, digital devices offered availability at any time of day. Tablet devices were considered to offer a high-quality viewing experience, making them a mobile supplement to the main screen. Mobile phones were used to complement and extend viewing.

ICMR research methodology

Ofcom's *International Communications Market Report* consumer survey covered the communications behaviour of internet users in eight markets: the UK, Germany, France, Italy, Spain, the US, Japan, and Australia. The research looked at the ownership and use of communications services and devices such as TV, mobile, fixed landline and internet. The research looked in detail at how consumers used communication devices and services to follow the Olympic and Paralympic Games. A total of 9,152 interviews with internet users were completed – with at least 1,000 in each market. Age and gender quotas in each market were set in line with those employed in earlier waves, to ensure historical consistency.

¹ <http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr12/>

² <http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr12/international/>

³ <http://stakeholders.ofcom.org.uk/spectrum/olympics/>

1.1.2 Key points

- **Since the 2004 Olympic Games, take-up of audio-visual digital devices and services through which the Games could be experienced has grown significantly.** Broadband take-up has grown by 60 percentage points to reach 76% of households in the UK, whereas 39% of UK adults have a smartphone, 10% own a tablet and 50% have a social networking profile (Ofcom technology tracker, Q1 2012).
- **According to BARB, more than 51 million viewers aged 4+ watched television coverage of the Olympic Games, and over 31 million watched the Paralympic Games for 15 minutes or more,** making the events the most-watched Games ever on UK television. The opening and closing ceremonies for the Olympic Games drew the biggest Olympics audiences ever, peaking at around 27 million viewers each.
- **Over 28.6 million viewers used digital interactive TV channels during the Olympics.** Three of the 27 channels achieved over 10 million viewers, while 26 of the 27 channels specially designated for Olympics broadcasts had over 1 million viewers.
- **According to Ofcom's research, television was the most-used medium to follow Olympics coverage, with 78% of UK adults saying they watched on television.**
- **Around half (52%) of UK adults followed coverage online on any device.** This rose to 64% among 18-24s and 66% among 25-34s. Forty-five per cent of 18-24 years olds and 48% of 25-34 year olds used a mobile phone to stay up to date with the Games, compared to the UK average of 28%.
- **Twenty-three per cent of adults who used tablets to follow the Games cited high-quality pictures and the viewing experience as reasons for using this device.** 'Being available at any time of the day' (32%) and 'choice of things to watch' (21%) were the other top reasons given for using a tablet.
- **Thirty-five per cent of adults who used a mobile to follow the Games cited availability at any time of day as a reason for using the device.** Twenty-seven per cent cited convenience as a reason and 17% cited immediacy.
- **According to Topsy, there were more than 150 million tweets about the Olympics during the Games.** Athletes including Usain Bolt and Michael Phelps; performers like the Spice Girls; the Olympics, London and Rio were some of the most popularly tweeted topics
- **According to Ofcom's research, the UK and Spain were the highest users of mobile phones to follow the Games, each with 28% of the population using this device.** Germany had the lowest use of mobiles to follow the Games, with 18% using the device to follow coverage.

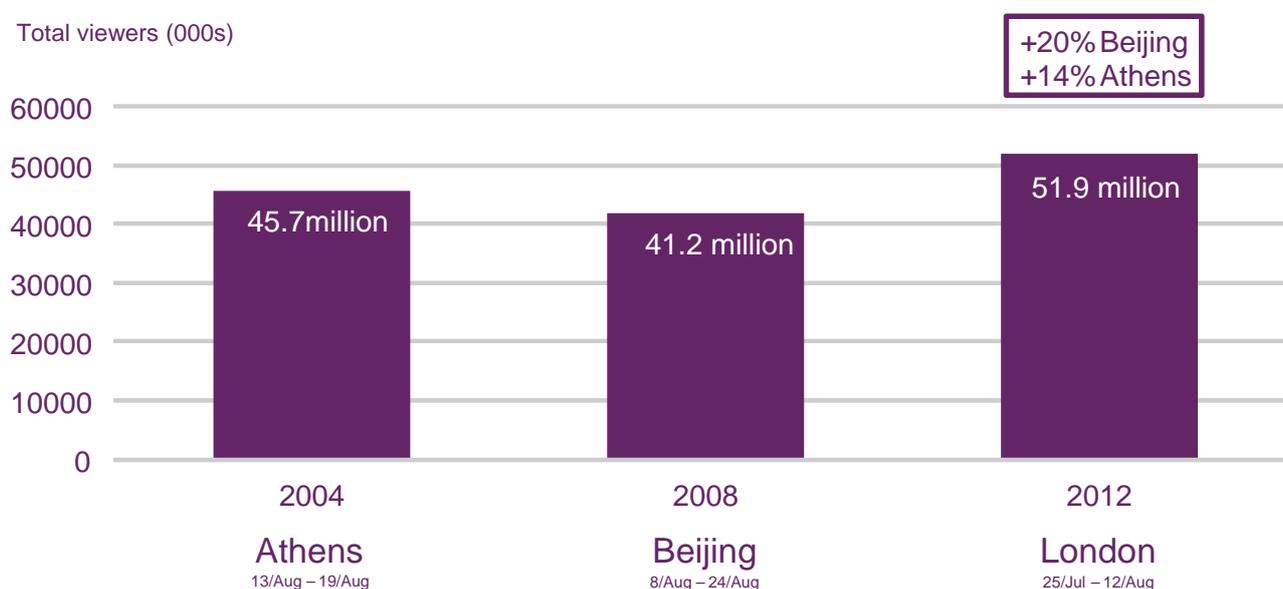
1.1.3 Television audiences during the Games

The BBC held the domestic television and radio rights for the London 2012 Olympic Games and Channel 4 had the UK television rights for the Paralympic Games.

More than 51 million people aged 4+ (89.7%) in the UK watched at least 15 consecutive minutes of Olympics coverage on TV

For UK viewers, the London Olympics was the most-watched Olympics ever, with over 51 million viewers aged 4+ watching 15 consecutive minutes of Olympics coverage at some point during the Games. This represented 20% more viewers than the Beijing Games and 14% more than the Athens Games (source: BARB).

Figure 1.1 Viewers watching more than 15 consecutive minutes of Olympics on TV: 2004, 2008, 2012



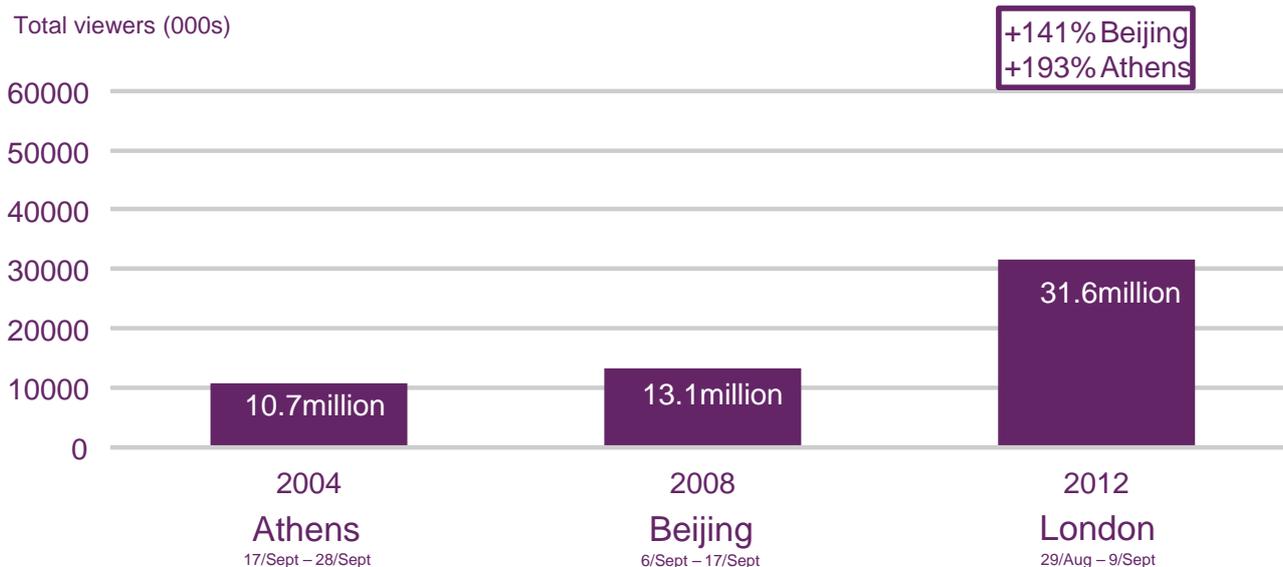
Source: BARB, 15 minutes + consecutive reach. Individuals 4+

More than half of all UK viewers watched at least 15 consecutive minutes of Paralympic coverage on TV

Figure 1.2 shows similar viewing trends for the Paralympic Games. At 31.6 million viewers (54.9%), the London Paralympics delivered 141% more viewers than the Beijing Games and 193% more viewers than the Athens Games.

Channel 4 provided three further channels, created for the sole purpose of carrying Paralympic coverage, and these channels were watched by an estimated 3.5 million viewers for 15 minutes or more. This represented 6% of UK viewers watching channels that didn't exist except during that period.

Figure 1.2 Viewers of at least 15 consecutive minutes of Paralympics on TV: 2004 - 2012



Source: BARB. Individuals 4+, 15 minutes+ consecutive reach. 2012 was broadcast on C4/More4/4Seven (C4 Paralympics channels did not report programme data and have therefore been excluded from the overall total reach). 2008/2004 Paralympic Games were broadcast on BBC One and BBC Two.

Both the opening and closing ceremonies of the Olympic Games in 2012 attracted peak audiences of around 27 million viewers

The opening and closing ceremonies of the Olympic Games achieved the largest audiences of the Games, each peaking at around 27 million viewers. The closing ceremony (26.9 million) attracted 35% more viewers than the next-highest audience in 2012: the half hour slot in which the men’s 100m final took place, at 19.8 million viewers.

All of the top five half-hour slots outperformed the top five slots of the last two Olympic Games. The smallest audience for the 2012 top five slots (for the men’s 200m final) delivered 37% more viewers than the highest audience in 2004 (the men’s 4x100 relay).

Figure 1.3 Top five half-hour slots for the last three Olympic Games



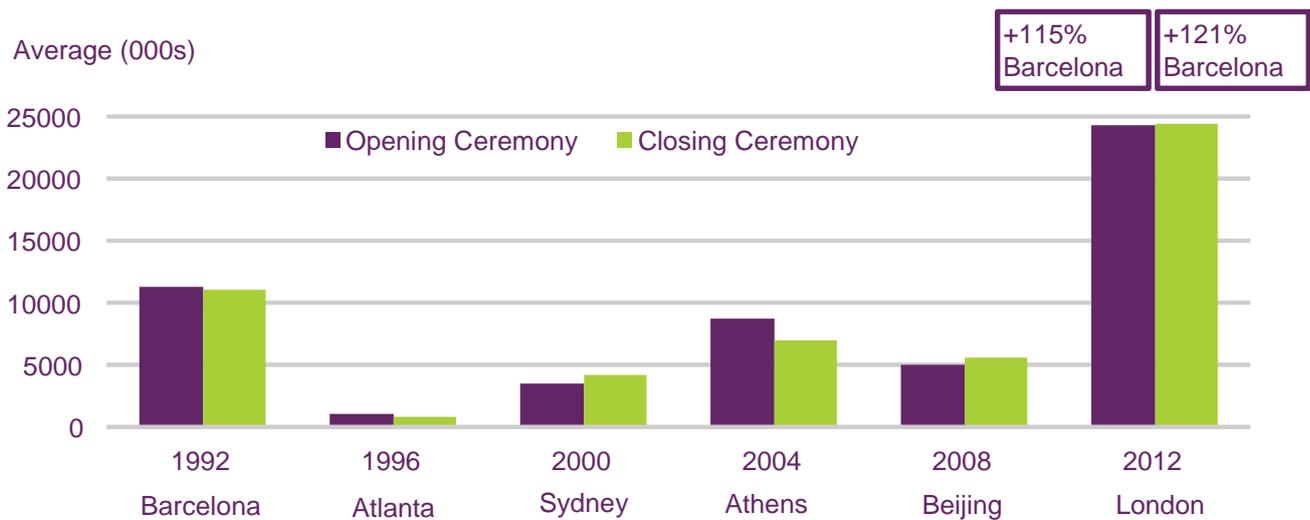
Source: BARB Individuals 4+, individual programme audience in 000s

The Olympics ceremonies had the highest UK audiences since the Barcelona Games in 1992

Figure 1.4 below compares audiences for the opening and closing ceremony programmes for six Olympic Games; from the Barcelona Games in 1992 to the London Games in 2012. The Barcelona Games had the second highest television audiences for the opening and closing ceremonies. As such, the London Games opening ceremony attracted 115% more viewers than the Barcelona Games ceremony, and 121% more watched the closing ceremony.

At 24.5 million people aged 4+, the London 2012 Olympic Games closing ceremony ranked the most watched programme of 2012 to date.

Figure 1.4 Audiences for Olympic Games opening and closing ceremonies: 1992-2012



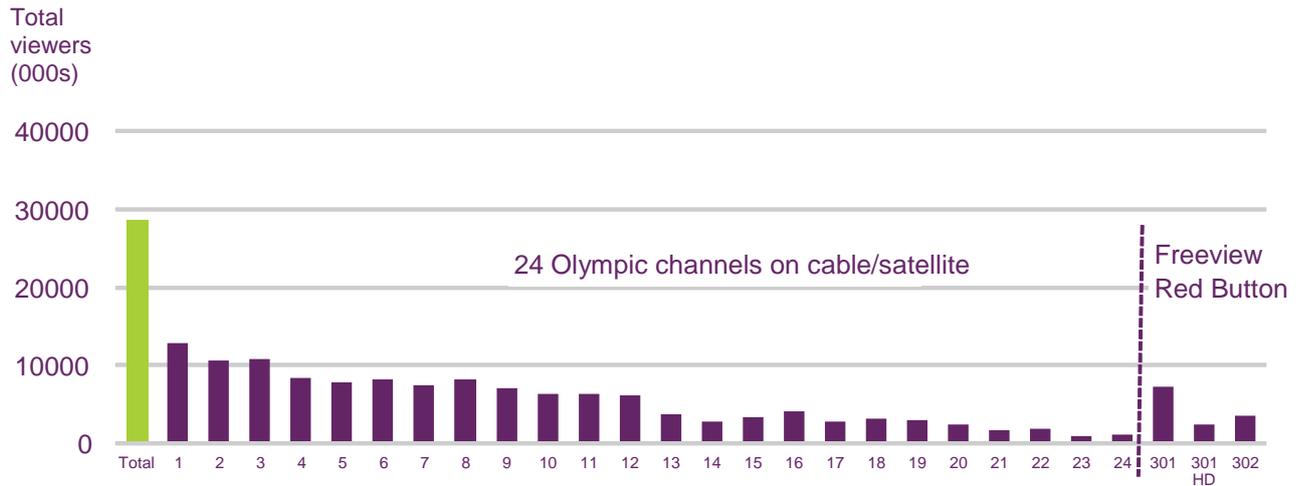
Source: BARB Individuals 4+, average audience

Almost half of the UK audience (28.6 million) used the red-button interactive service for viewing Olympics content

The BBC set out to provide live coverage of every London 2012 Olympic sport from every venue throughout the day. The BBC's red button service provided access to three additional channels of Olympics coverage available to those with Digital Terrestrial television (Freeview). Sky, Virgin Media and Freesat each offered their subscribers access to the BBC's 24 live stream channels available in both standard and high definition.

Across the 24 Olympics channels and the three Freeview red-button interactive channels, over 28.6 million people in the UK watched the Olympic Games for three minutes or more. Twenty-three of the 24 Olympic channels attracted more than 1 million viewers, and three channels attracted more than 10 million viewers. Across the three Freeview channels, 7.1 million viewers tuned in to the most-watched channel, while 2.3 viewers tuned into the least-watched one.

Figure 1.5 Viewers of additional Olympics digital channels across cable, satellite and Freeview



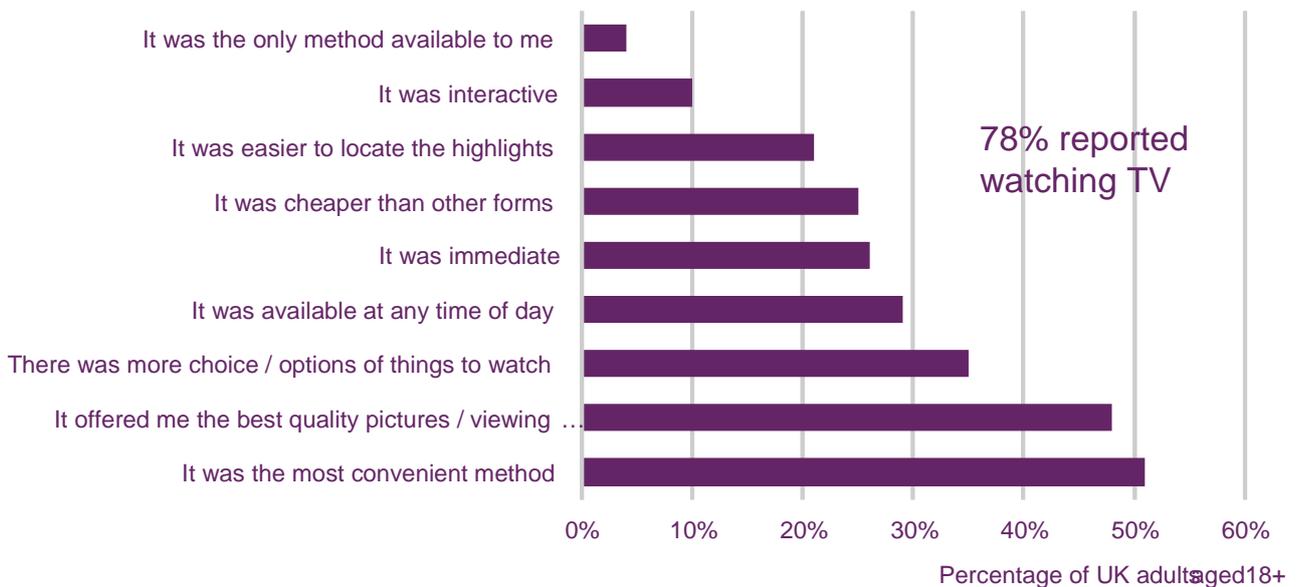
Source: BARB. 3 minutes+ consecutive reach. 24 Olympic Games channels (labelled as 1-24) on cable/satellite and three channels on Freeview (labelled as 301, 301 HD and 302). Individuals 4+

Half of those who watched on TV said they did this for convenience

According to Ofcom’s research, half of those who watched on TV (50%) said they did this for convenience, with a slightly lower proportion (48%) regarding television as a high-quality option to follow the Games (See Figure 1.6 below).

With 24 red-button channels on cable/satellite and three red-button channels on Freeview, in addition to the three main channels (BBC One, BBC Two, BBC Three), 35% of respondents said that they were afforded ‘more choice and options of things to watch’.

Figure 1.6 Reasons why UK adults watched London 2012 Olympics on television



Source: Ofcom market research, September 2012 Q. Why did you choose to follow the Games using this method? (Multicode) Through scheduled television Base: All respondents who watched any Olympics or Paralympics coverage using this method (n = 832)

1.1.4 Take-up of communications devices and services

Since the Athens 2004 Games, take-up of digital devices and services has grown significantly

According to Ofcom research, take-up of value-added services such as HD, 3D-ready and connected TVs has grown since the 2004 Olympic Games. Seventy per cent of UK adults own an HD or HD-ready television in Q1 2012. Nearly half (47%) of adults owned a DVR, compared to 10% penetration in 2004. Take-up of connected TVs reached 5% of UK households in Q1 2012.

Broadband penetration has also grown since previous Games. In 2004, 16% of UK adults had access to broadband at home, compared to 76% in Q1 2012. Digital devices such as laptops, smartphones and tablets were also more prevalent. Four in five UK adults (79%) now own a PC/laptop/netbook/tablet device, compared to 64% in 2004. Take-up of smartphones among UK adults reached two in five (39%) in 2012, and take-up of tablets reached one in ten (11%).

Facebook was launched in 2004, and eight years later according to Facebook, there were over a billion Facebook profiles globally⁴. Ofcom research, shows that half of all UK adults aged 16 or over claimed to have an active social networking profile in Q1 2012. Other social networking sites like Twitter and YouTube, which did not exist during the Athens Games, reported half a billion users globally, and 4 billion videos being watched on the internet per day, respectively.

Figure 1.7 Device and service penetration in Olympics years: 2004, 2008 and 2012

	2004 % UK adults	2008 % UK adults	2012 % UK adults
HD or HD-ready*	-	-	70
DVR	10	20	47
3D-ready*	-	-	6
Connected TV*	-	-	5
Broadband at home (excl. mobile)	16	58	76
PC/laptop/ netbook*/tablet*	64	69	79
Mobile ownership	89	92	94
Smartphone*	-	-	39
Tablets*	-	-	11
With a social network profile*	-	30 [‡]	50

Worldwide figures

	2004	2008	2012
Facebook	Launch	100 million profiles	1 billion+ profiles
Twitter	Not launched	3 million users	500 million users
YouTube	Not launched	100 million videos a day	4 billion videos a day

Source: Ofcom Technology Tracker Q1 2004/2008/ 2012. *Did not ask about these devices in 2004,2008 ‡ Q1 2009

Facebook Statistics provided by Facebook <http://newsroom.fb.com/Key-Facts> (retrieved September 2012)

Twitter Statistics provided by Twitter <http://blog.twitter.com/2011/09/one-hundred-million-voices.html> (September 2012)

YouTube Statistics provided by Youtube Youtube stats http://www.youtube.com/t/press_statistics (retrieved October 2012)

⁴ Facebook <http://newsroom.fb.com/Key-Facts>

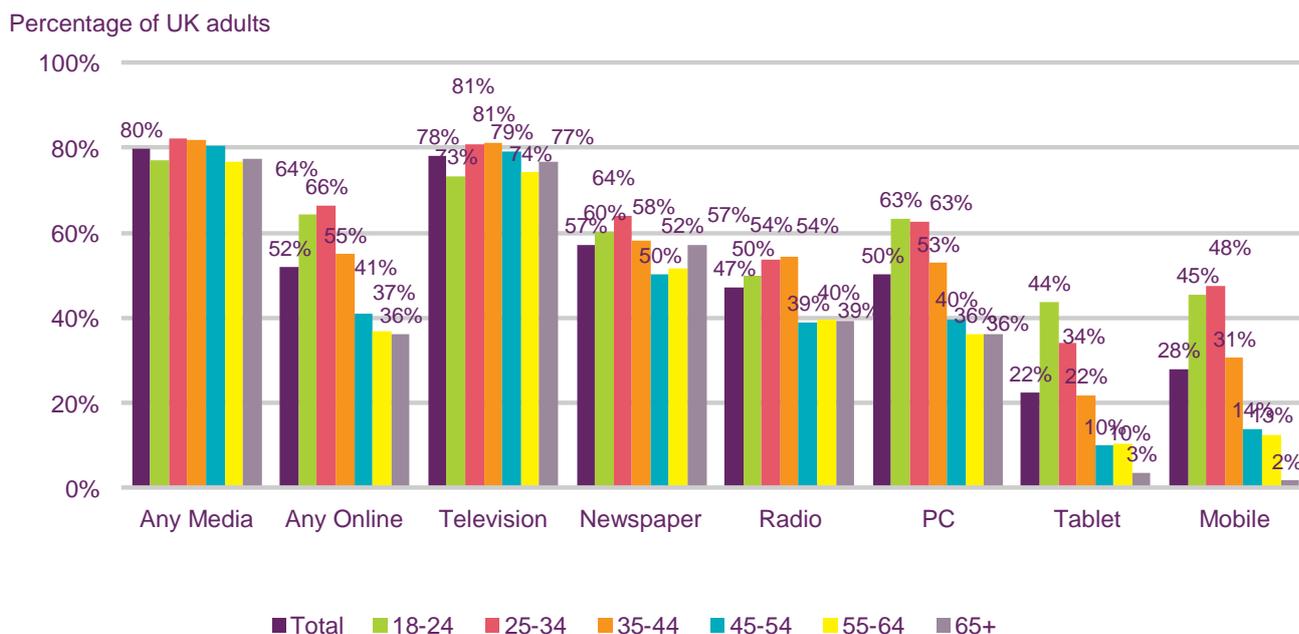
Almost half (48%) of 25-34 year olds used a mobile phone to follow the Games

In September 2012, Ofcom undertook research into UK adults' media consumption of the Games. The research showed that television was the most-used medium for following the Games, with 78% of UK adults aged 18 and over reporting that they watched the Games on TV (see Figure 1.8 below). The other media we measured added only 2% additional reach, illustrating the popularity of television as the main source for following the Games.

Over half of the respondents said that they used a PC to follow the Games, while 41% used catch-up TV. More than one in four (28%) used a mobile phone to follow the Games and one in five (22%) used a tablet.

While television was popular with all age groups, a more nuanced picture emerged in relation to consumption on PCs, tablets and mobiles. Almost two in three (63%) 18-24 year-olds and 63% of 25-35 year-olds followed coverage on a PC/laptop, while slightly more than two in five adults aged 35+ were likely to do this. Mobile devices such as tablets and mobile phones showed even greater differences in use by age. More than two in five (44%) 18-24 year olds and one in ten (10%) 55-64 year olds used a tablet to follow the Games. Similarly, close to half (45% and 48% respectively) of UK adults aged 18-24 and 25-34 used a mobile phone to follow the Games, while slightly more than one in ten (13%) adults aged 55-64 and 2% of adults aged 65+ used a mobile to follow the Games.

Figure 1.8 Type of media used to follow London 2012 Olympic and/or Paralympic Games, by age



Source: Ofcom market research, September 2012

Q. In which of the following ways did you personally follow coverage of the London 2012 Olympic and/or Paralympic Games and how often did you do follow the Games in this way? (Multicode)

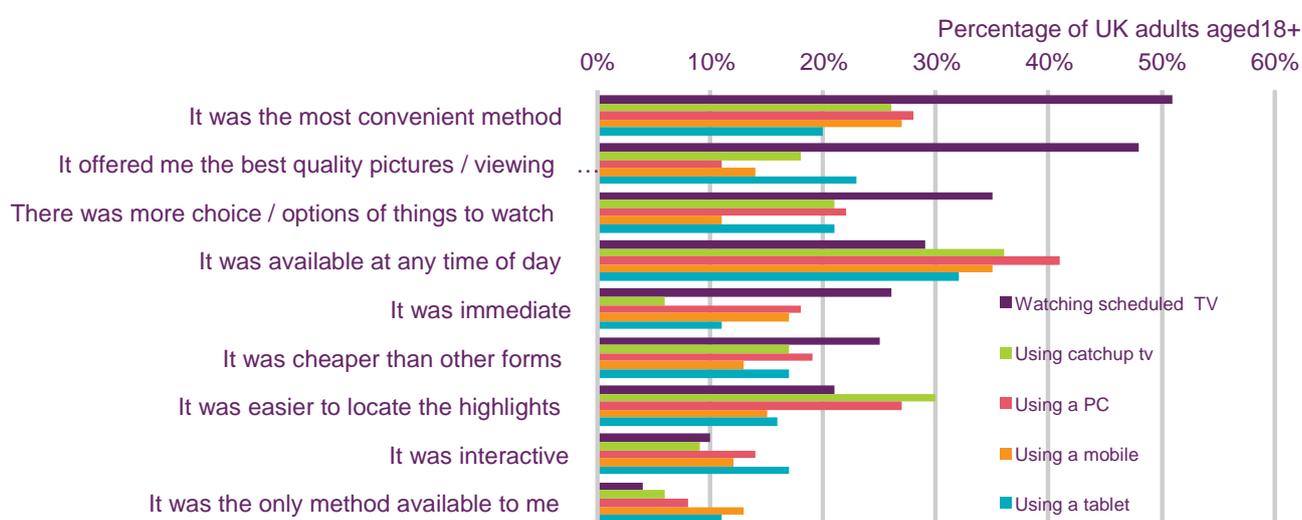
Base: All respondents who watched any Olympics or Paralympics coverage (n = 797) Rebased to all adults (n=1000)

The most-cited reason for using digital devices and services was 'being available at any time of day'

According to Ofcom's research, reasons for choosing to watch the Games on a PC were availability at any time of day (41%), convenience (28%), and ease of locating the highlights (27%). Similarly, for those who used catch-up on TV, the most common reason given for using this method was 'availability at any time of day' (36%). The other top reasons given for using these devices were: 'ease of locating the highlights' (30%) and 'convenience' (26%).

With mobile phones and tablets, the stories were slightly different. For those who used mobile phones, while availability (35%) and convenience (27%) remained top, the third most popular reason was that it was immediate (17%). People who chose tablets to keep up with the Games gave availability (32%) as a reason, but also cited best-quality pictures/ viewing experience (23%) and choice/option of things to watch (21%) as reasons to use the device for the Games.

Figure 1.9 Reasons why people followed the Games using digital devices



Source: Ofcom market research

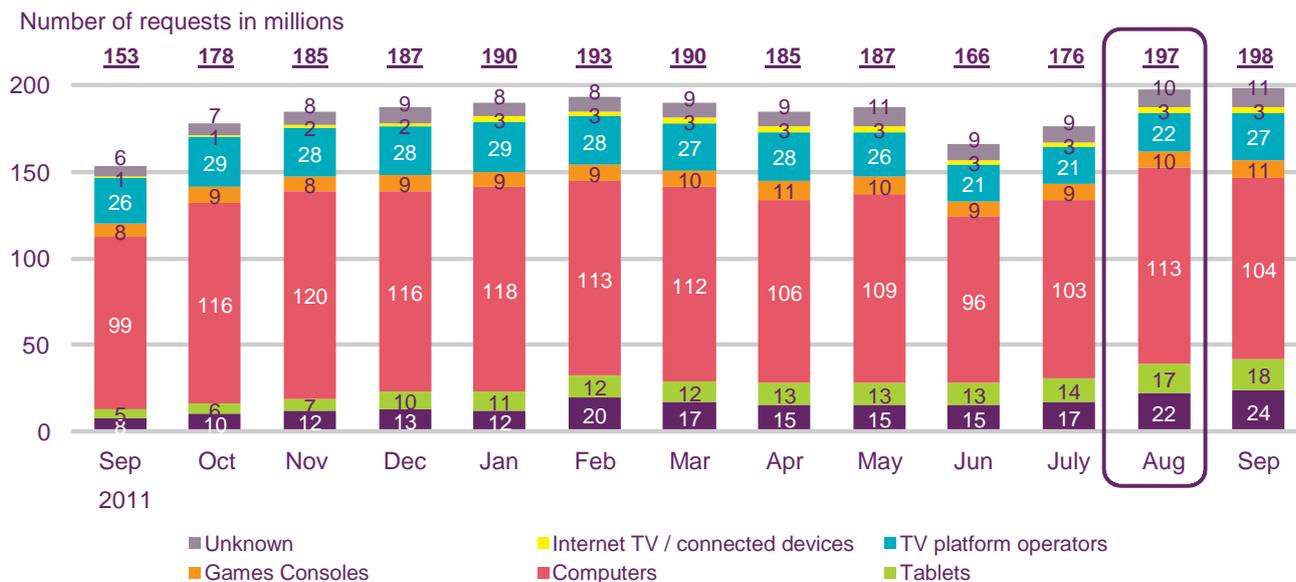
Q.G6 Why did you choose to follow the Games using this method? (Multicode)

Base: All respondents who watched any Olympics or Paralympics coverage using this method.

On-demand requests to BBC iPlayer from PCs rose by 10% during the month of the Olympics.

According to BBC iPlayer statistics, on-demand requests to the BBC iPlayer rose in August, probably driven primarily by Olympics viewing. Total on-demand requests rose from the previous month to over 197 million; including over 10 million (10%) more requests from PCs, 3 million (21%) more requests from tablet devices, and 5 million (29%) more requests from mobiles, compared to the previous month. This unseasonal rise in on-demand requests broke all previous records. In September 2012 viewing of on-demand content via the BBC iPlayer continued at this higher level, with 198 million requests, but driven instead by a 22% month-on-month rise in requests via TV platforms and a 9% rise in requests via tablet devices.

Figure 1.10 Number of on-demand requests via BBC iPlayer



Source: BBC iPlayer statistics: BBC iStats

<http://www.bbc.co.uk/mediacentre/latestnews/2012/iplayer-performance-sep12.html>

During August 2012, Twitter, BBC Sport and London 2012 websites each saw record unique audiences

The LOCOG official London 2012 website (www.london2012.com) was created in 2002⁵. The website featured news, a real-time map of the torch relay, venues, tips about how to get around and medal counts of athletes and countries. It served, and continues to serve, as the official internet record of the 2012 Games. According to Nielsen statistics, during July 2012, when the torch relay was being carried ‘virtually’ on the London2012 website, the London2012 website received over 5 million unique visitors from the UK. And in August, while the Games were ongoing, the London 2012 website had 5 million unique visitors. The numbers were double those in May (207%) and June (211%). Unsurprisingly, once the Games were over, the intensity and volume of internet traffic declined as the site evolved to provide a legacy function.

According to Nielsen statistics, during August 2012 the BBC Sport section of its website (www.bbc.co.uk/sport) had 40% more UK visitors via desktop and laptop internet users than in August of the previous year. With 9.6 million unique visitors in the month of the Olympic Games, BBC Sport had 14% more people than in the previous month (July) and 33% more than the subsequent month (September).

Unique audiences to the Twitter website was 19% above its level in August 2011; it received 6.9 million unique visitors from the UK. After the Games, Twitter’s online blog reported huge volumes of tweets about sports and events, and especially about individual athletes such as Usain Bolt (80,000 tweets per minute) and Andy Murray (57,000 tweets per minute).⁶

Twitter

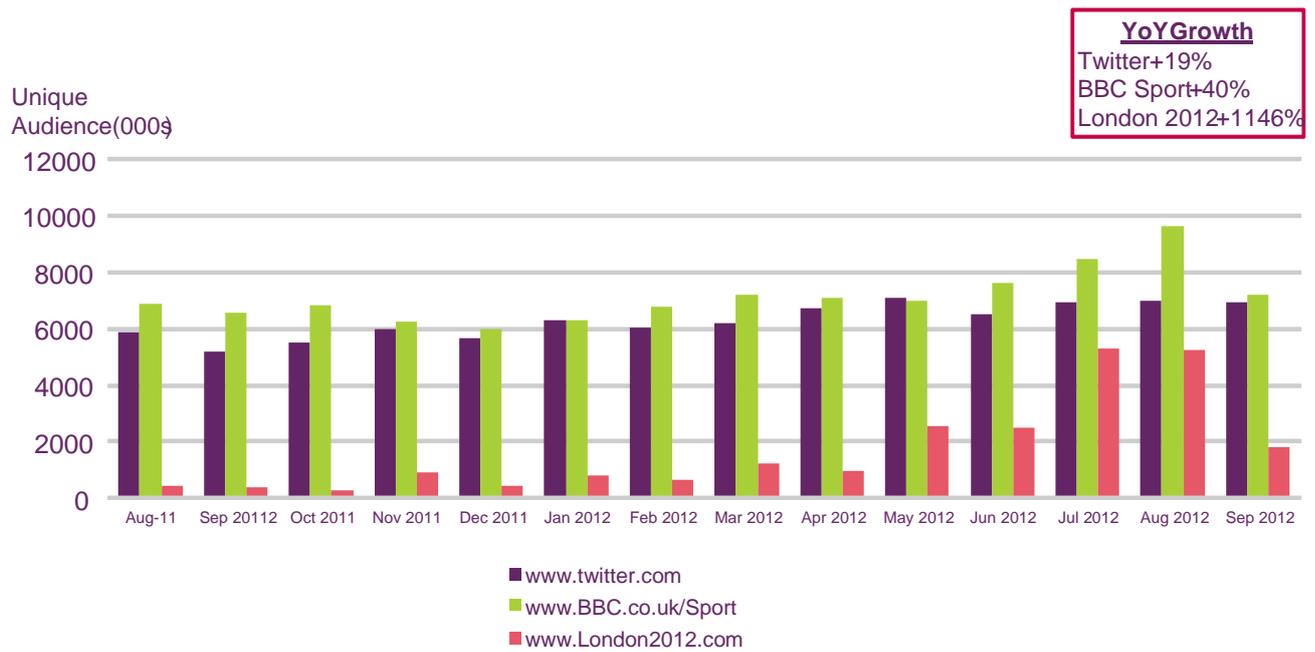
Twitter is a globally-used information network which typically carries 350 million packets of information per day, posted by users.⁷ Each packet is called a ‘tweet’ and can carry informational text or links to web pages, pictures and audio-visual content. Most tweets are open to the public, and the content can be measured by simply counting common phrases or indexed phrases. These phrases are indexed using a hash tag (#) placed in front of the word.

⁵ <http://whois.domaintools.com/london2012.com>

⁶ <http://blog.twitter.com/2012/08/olympic-and-twitter-records.html>

⁷ <http://twitter.com/about>

Figure 1.11 Unique audiences of three Olympics-related websites on laptop and desktop computers



Source: Nielsen UKOM

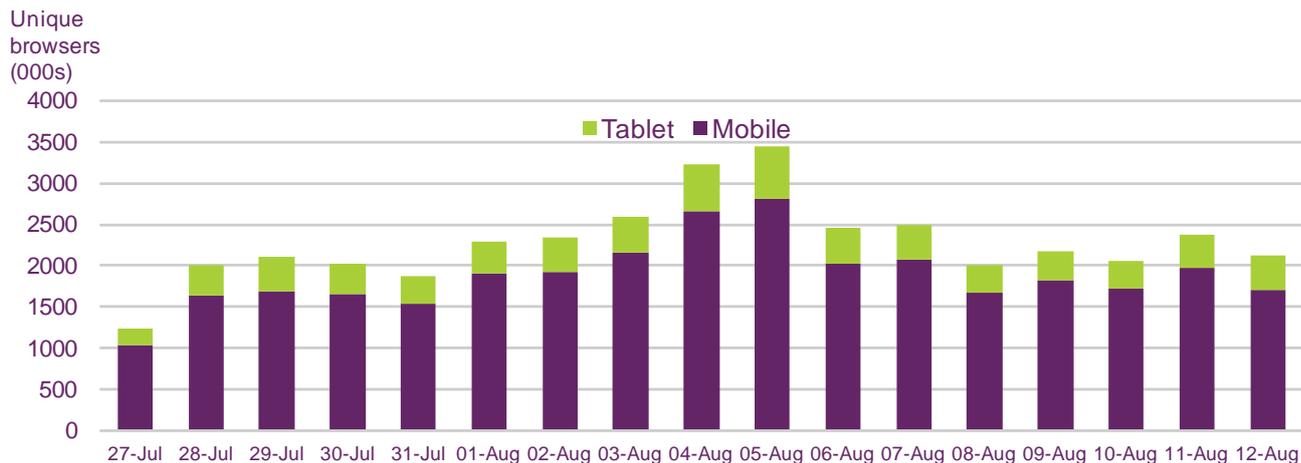
(Netview UK) Unique audience is defined as the total number of unique persons who visited the website or used an application at least once in the specified reporting period. The (000) designates that the number is in thousands - for example, 3 million is 3,000 instead of 3,000,000.

On 5 August, the day of the men’s 100m final, tablet and mobile traffic to the BBC Sport website peaked at 3.4 million unique browsers

Traffic from mobile devices and tablets to the BBC Sport website fluctuated throughout the course of the Games, peaking on 5 August, the day of the men’s 100m final, at over 3.4 million unique browsers (see Figure 1.12 below).

The fluctuation followed a cyclical pattern, peaking at weekends. During the first weekend (28-29 July), around 1.7 million unique mobile phone browsers visited the site. Following a mid-week decline, this figure grew back to over 2.8 million unique users, then declined again and on 11 August, rose to over 1.9 million. Tablet traffic, while not as numerous, followed a similar pattern, peaking during weekends. Tablet traffic during the Games started at around 160,000 on 27 July and peaked at over 600,000 on 5 August; a 226% rise since the beginning of the Games.

Figure 1.12 Web traffic via tablets and mobile devices to the BBC Sport website



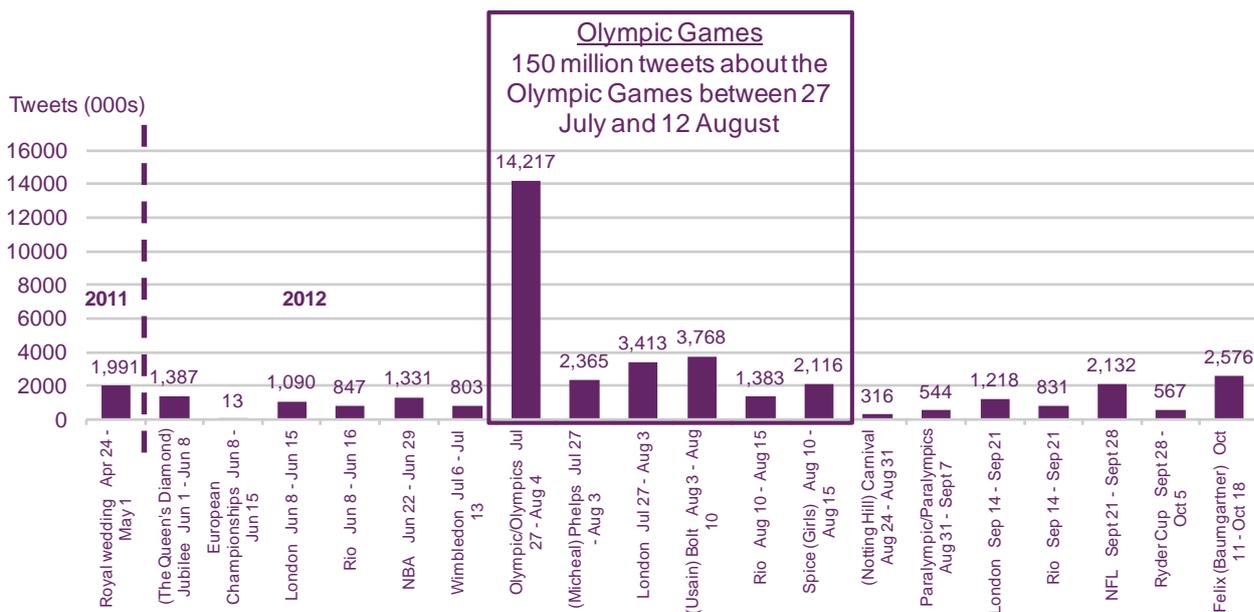
Source: BBC Digital Olympics blog: BBC iStats
http://www.bbc.co.uk/blogs/bbcinternet/2012/08/digital_olympics_reach_stream_stats.html
 Unique browsers are counts of unduplicated web browser visits to the website. using BBC iStats.

During the Olympics there were an estimated 150 million tweets about the Olympics Games

According to Topsy, the Olympic Games sparked an estimated 150 million tweets between 27 July and 12 August. This large volume consisted of tweets about Olympics events, mentions of athletic stars, locations and ceremonies. Compared to another British sporting event, the Wimbledon tennis championship, ‘Olympic’ or ‘Olympics’ received 16 times more mentions on Twitter.

Olympics stars and locations were also the subject of many tweets. The word ‘Bolt’ (for Usain Bolt) reached 3.7 million tweets between August 3 and August 10. The closing ceremony of the Olympic Games featured the Spice Girls: the number of tweets mentioning ‘Spice’ rose during the week of that event. Between August 10 and August 15 the word ‘Spice’ was mentioned 2.1 million times.

Figure 1.13 Number of tweets about events and Olympics personalities, by date



Source: Topsy Social media dashboard: numbers of tweets per (time period)

1.1.5 The international market during the Games

Among eight comparator countries, around three-quarters (75%) of people in each location said they followed the Games on television

Ofcom's consumer research covered a range of international markets. Results showed that adults in Italy and Japan (both at 84%) were the most likely to say that they followed the Games using any device, 4 percentage points more than in the UK. Those in the USA, France and Germany were the least likely to say they used any of these devices to follow the Games.

Seventy-eight per cent of UK adults said that they followed coverage of the Olympic and/or Paralympic Games on scheduled television. A higher proportion of adults in Italy and Japan said they watched TV, at 83% and 81% respectively. Among the countries that we looked at, Germany and the US were the least likely to use scheduled television.

About one in five people in the UK used catch-up television to follow Olympics coverage. Across the nations that we measured, Ofcom research showed that three in five adults in France used catch-up TV to keep up with the Games. German and Spanish adults (25% and 31% respectively) were the least likely to use this service.

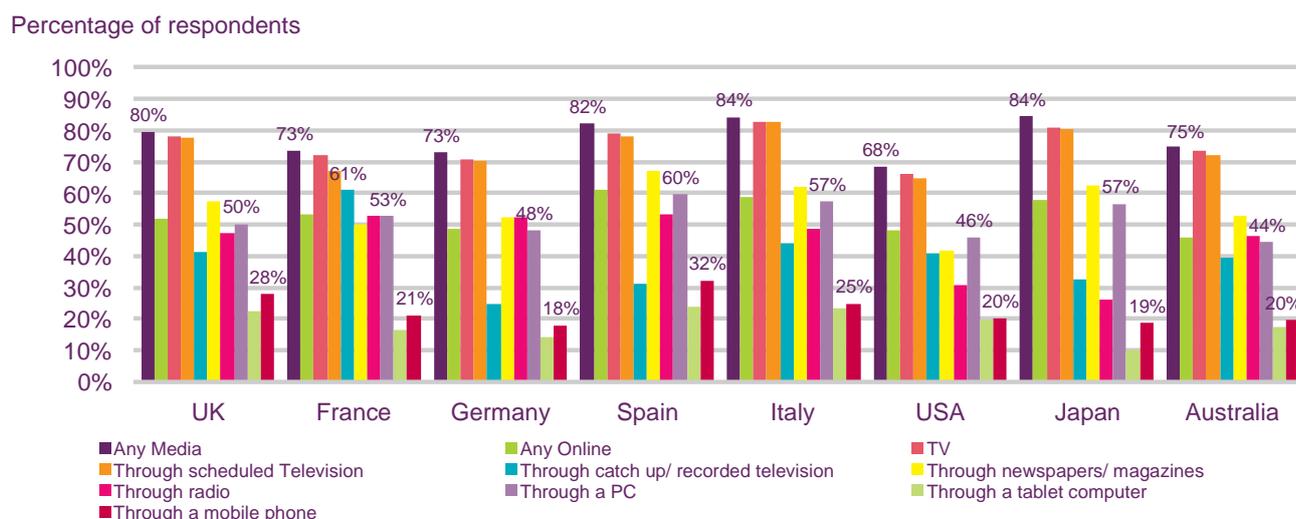
In terms of radio use, almost half (47%) of UK adults used this as a means of catching up with the Games. Conversely, in Spain and France, 53% of adults in each country reported using the radio. Use was lower in Japan and the US, where 26% and 31% reported using the radio for Games coverage.

In the UK, half of all adults over 18 said that they used a PC to follow the Games. Following the Games via a PC was highest in Japan and France, at 57% and 53% respectively; and lowest in the US and Australia, at 46% and 44% respectively.

Adults in Spain and Italy were the most likely to use a tablet computer to follow the Games (24% and 23% respectively), while French and German adults were the least likely (16% and 14% respectively). Twenty-two per cent of UK adults were likely to use a tablet to follow the Games.

Using mobile devices to follow the Games was slightly higher than the use of tablets, at 28% of adults in the UK and in Spain. Adults in Germany and Japan, at 18% and 19% respectively, were the least likely to use a mobile to follow the Games.

Figure 1.14 Means of accessing the Games, by comparator country



Source: Ofcom market research, September 2012

Q. In which of the following ways did you personally follow coverage of the London 2012 Olympic and/or Paralympic Games and how often did you do follow the Games in this way?

Base: All respondents (weighted base) (n = 9000) UK=1000, France=1000, Germany=1000, Spain=1000, Italy = 1000, USA =1000, Japan=1000, Australia=1000