



mediabug

listening in on future media

Wave 9 Summary

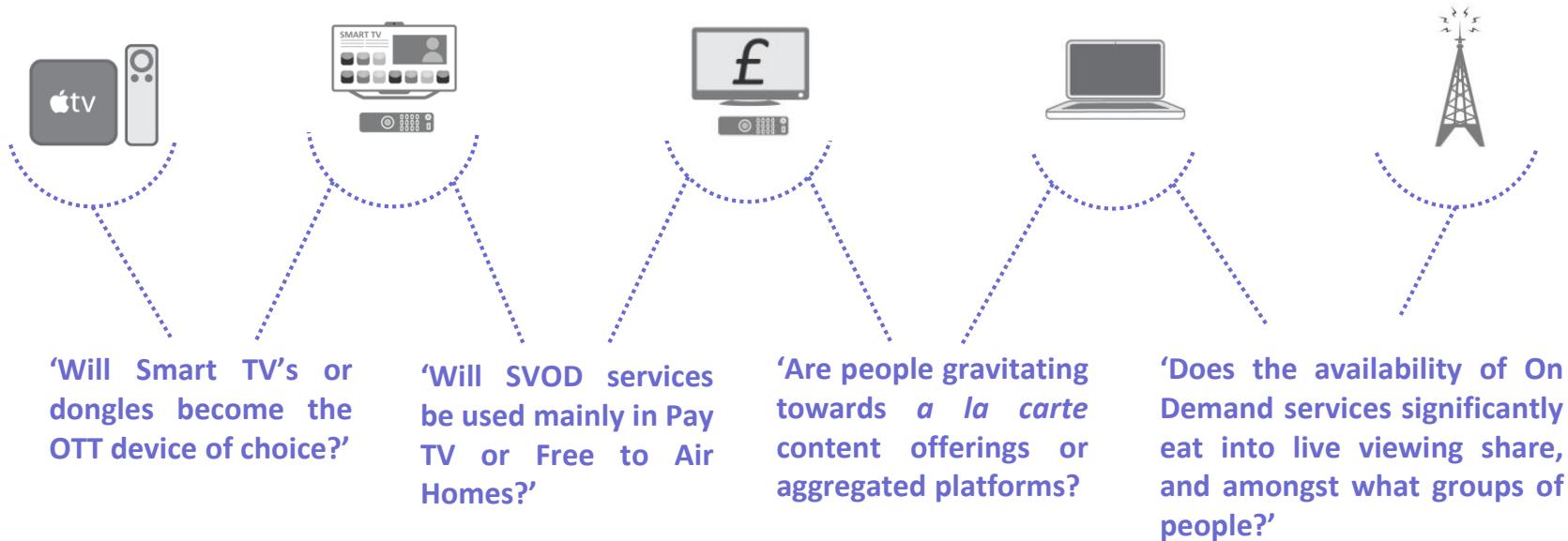
Sept 2016



www.decipher-blog.co.uk/mediabug

mediabug

Tracking how emerging media technology impacts behaviour & consumption



What does mediabug track?

mediabug is a special type of research tracker produced by Decipher that explores how UK media consumption is changing. It investigates the rapidly evolving digital media landscape and tracks its take-up and usage in the UK



demographics

- Gender
- Age Range
- Social Grade
- Combined Annual Income
- Domestic Status
- Age of Dependants
- Position in Household



devices

- TV set-top boxes from Sky, Virgin, TalkTalk BT, YouView, Freesat, EE TV, and YouView TV from Plusnet
- **NEW: Sky Q**
- **NEW: NOW Smart TV box**
- PCs & Laptops
- Smartphones
- Tablets
- Games consoles
- Smart TVs & BD Players
- **NEW: 4K Smart TV**
- Apple TV
- NOW TV & Roku box
- Google Chromecast
- Amazon Fire TV box



content & subscriptions

- Free online VOD services:
 - BBC iPlayer
 - ITV Hub
 - All 4
 - My 5
 - UKTV Play
- Online VOD subscription services:
 - Netflix
 - Amazon Prime
 - NOW TV & Sky Go
 - DisneyLife
 - **NEW: BT Sport**
- TVOD & EST services from:
 - iTunes
 - Google Play
 - Amazon Instant Video
 - Sky Store
 - Wuaki .TV
 - XBOX Video
 - PlayStation Store
 - Curzon On Demand
 - [TV EST] Sky & BT
 - TalkTalk TV Store
 - BBC Store



usage

- Awareness of new and existing services
- How often are they used?
- Where are they used?
- How is content discovered?
- What content is watched?
- Which device is content watched on?
- How is content paid for (subscription vs. PPV)?
- How does usage differ in pay/free households?
- Share of usage by device
- Usage of simulcast



services

- Internet Speed
- Mobile Phone Network
- Mobile Phone Operating System
- TV package
- Broadband Provider

Methodology

BI-ANNUAL RELEASE

NEW REPORT



INTERVIEW STYLE: Online Survey
AVG DURATION: 13 minutes
FIELDWORK DATES: 14 SEP – 20 SEP 2016

SAMPLE SIZE

3018

Data weighted to national proportions (gender, age and region) using National Census Data from the Office of National Statistics

SAMPLE ATTRIBUTES

- Resident in UK
- Ages 16+
- Have broadband internet at home
- Nationally proportionate

SAMPLE SOURCING

- Recognised and accredited panel recruitment sources.
- All respondents are incentivised.

Pricing

ONE WAVE: £3,500^{+VAT}

TWO WAVES: £6,000^{+VAT}

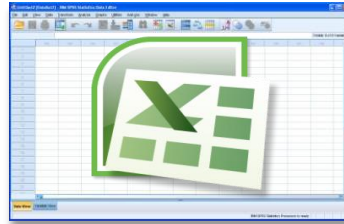
CUSTOM QUESTIONS*: £500^{+VAT} *each*

£1,000
discount

WHAT YOU GET...



WRITTEN REPORT
[PPTX & PDF]



CUSTOM ANALYSIS
REQUESTS ON MEDIABUG
DATASET FOR 6 MONTHS**



FACE TO FACE DEBRIEF
WITH DECIPHER ANALYSTS

What's NEW in Wave 9?

SKY Q
New SET TOP
BOX from
Sky



NOW TV SMART BOX
New OTT device from
NOW TV



New Device
4K SMART TV



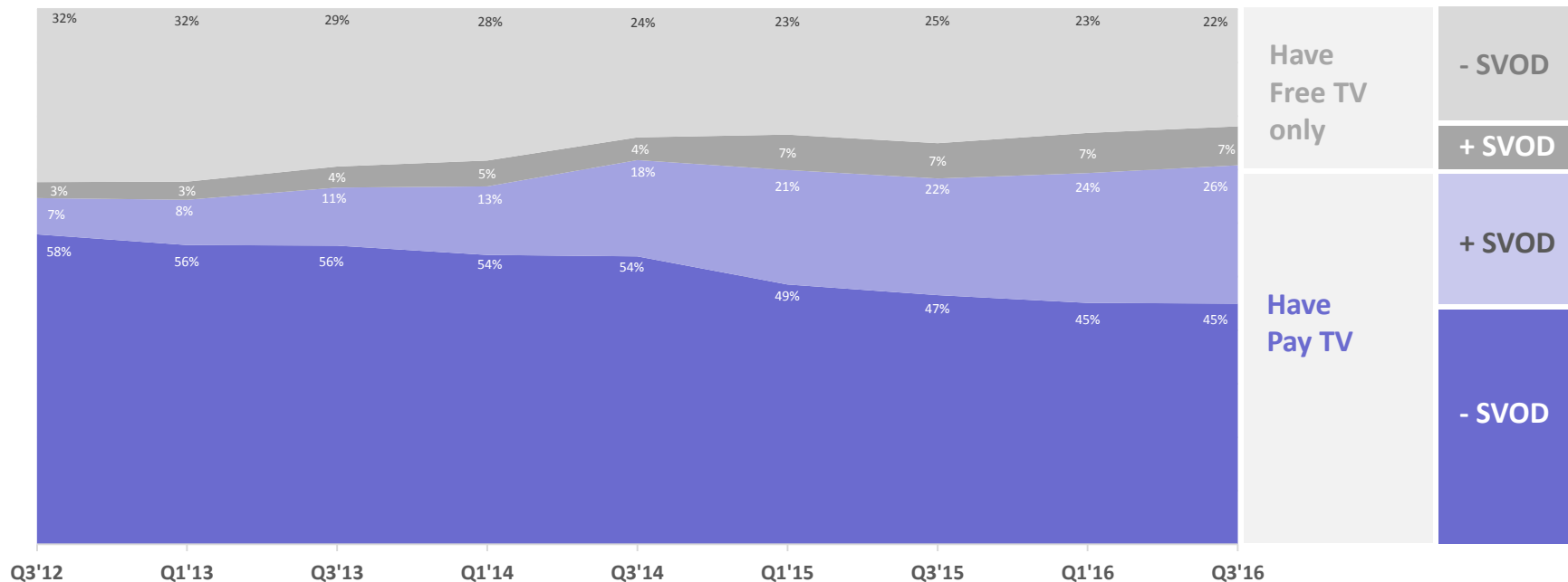


EXAMPLE EXTRACTS FROM WAVE 9

Cross-Platform Trends » Take up of TV and SVOD

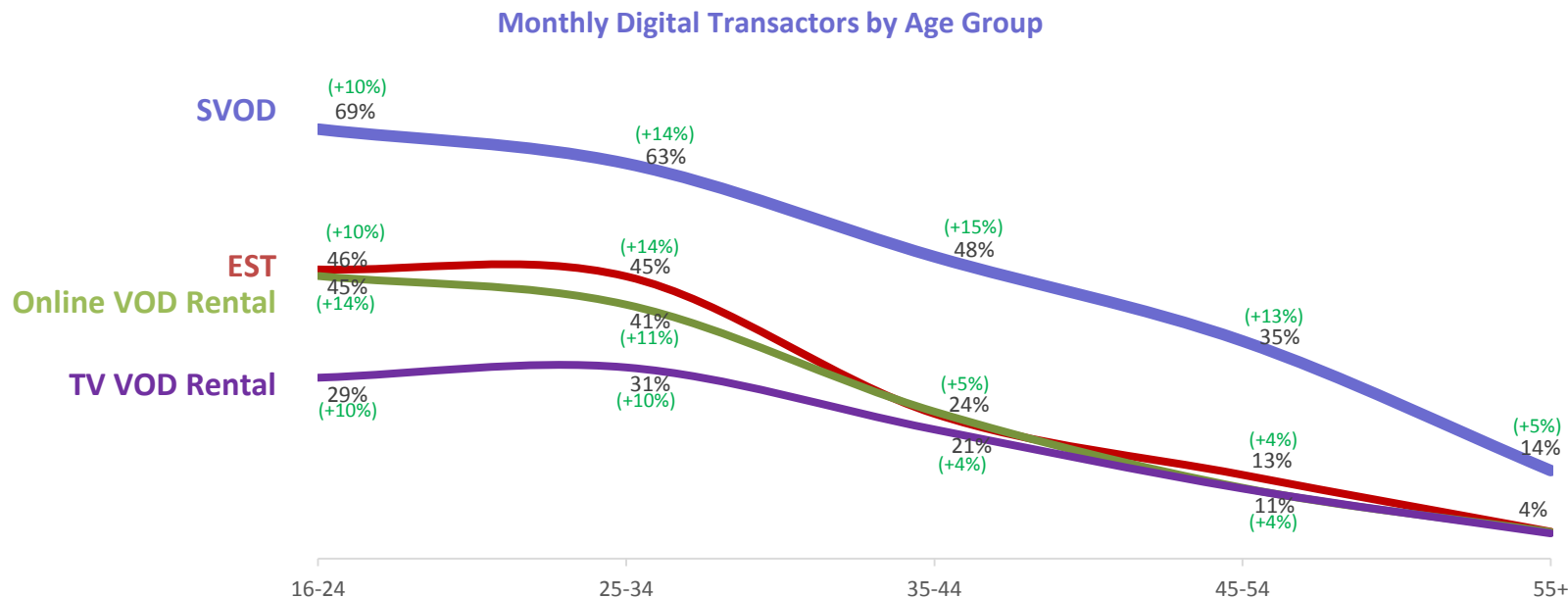
Whilst the Pay TV total base has grown against the non-Pay base over the last 4 years, SVOD has achieved more significant take up in Pay homes. Many non-Pay homes have taken up Pay TV, but only a small percentage have stayed 'Free' but taken up SVOD.

UK Population with Pay TV, SVOD, both, or neither, since 2012



Trends by Demographic » Monthly digital usage by age group

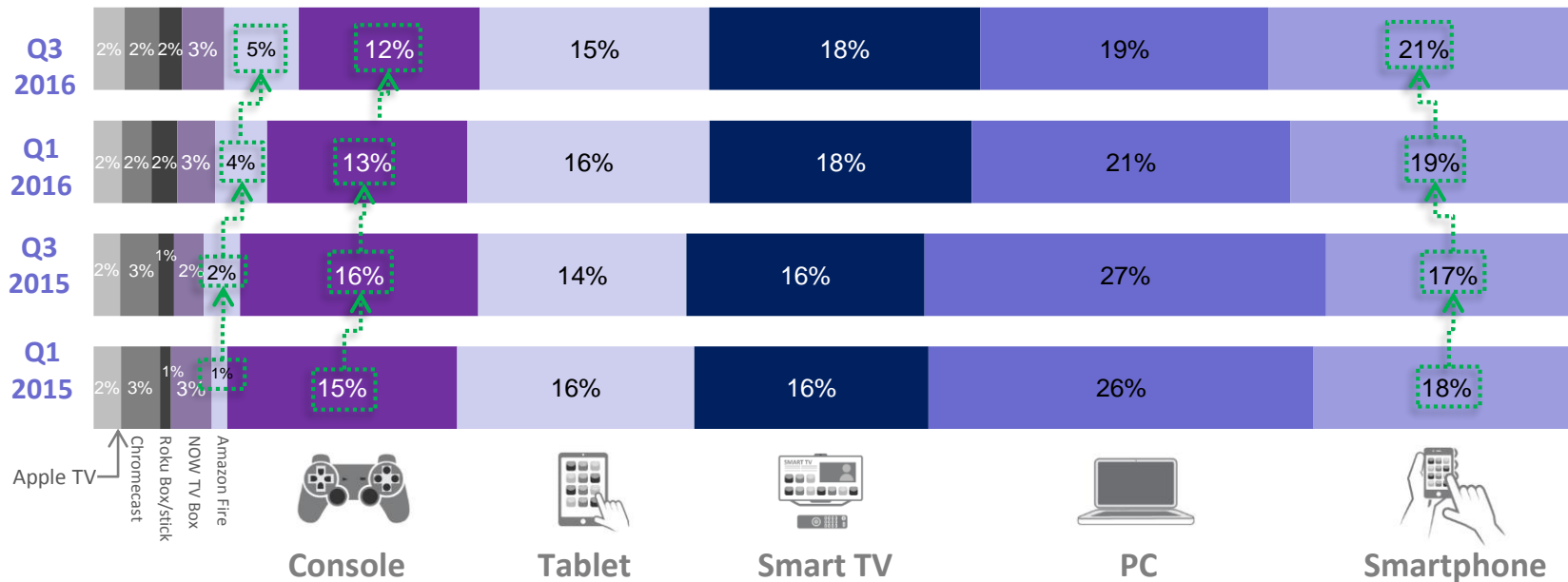
There is growth across all ages ranges. Increases in young users of SVOD continues, although older age ranges are now also growing. Regular users of EST have increased amongst 16-34's, but growth is less pronounced amongst older age ranges.



Trends in Share of Usage » Share of Usage by Device

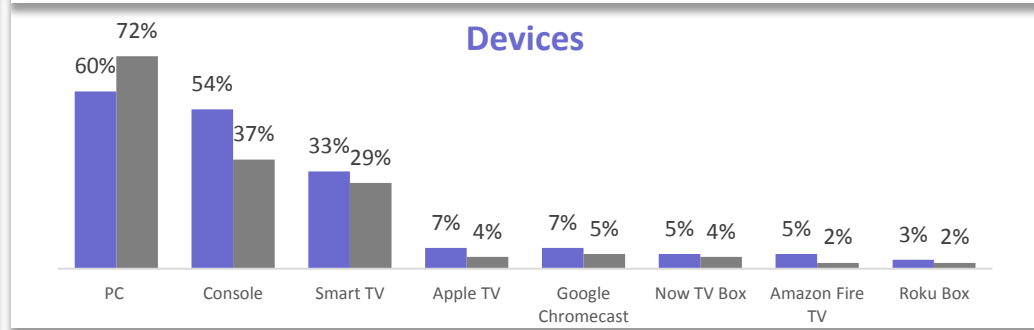
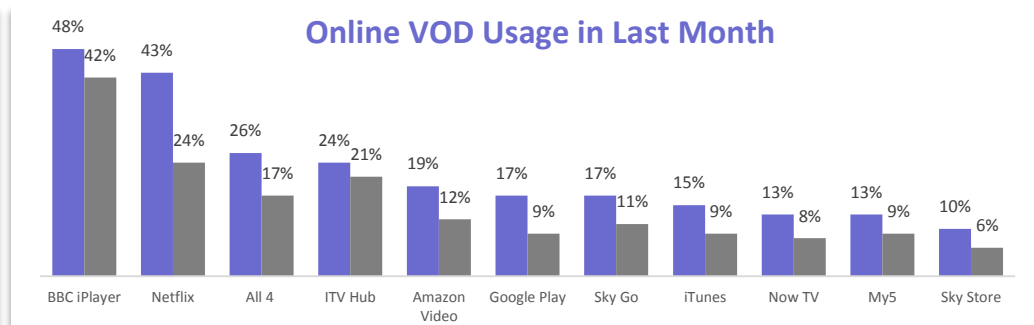
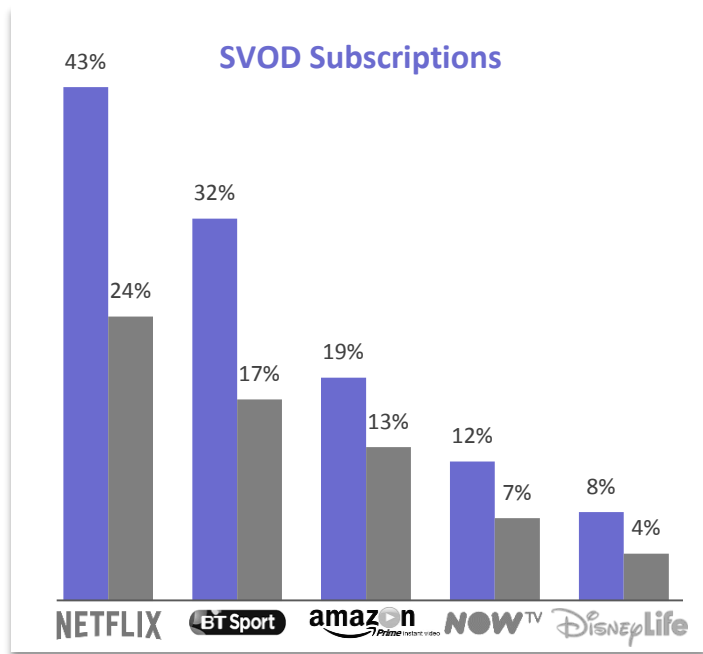
Amazon Fire Stick continues its sharp growth in share of VOD viewing, rising another +1% since March. Smart TV's held their 18% share from March; a +2% rise YOY. Consoles and PC's continues to lose share of VOD usage, however Smartphones appear to have recovered from a 2015 dip; and have now achieved a higher share of usage than both. Perhaps large smartphones are the cause.

Share of online VOD usage by device vs. penetration:



Consumer profiles » Millennials

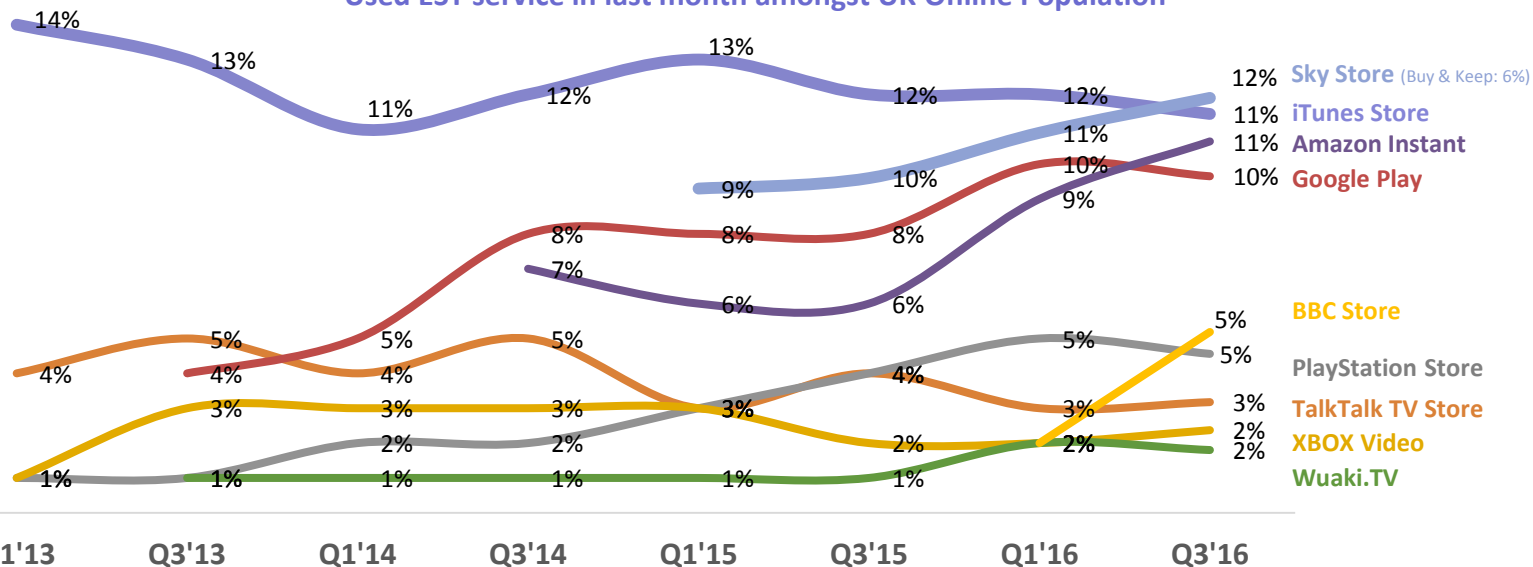
Millennials are more likely to have SVOD subscriptions than the general population. 43% have Netflix in the home, followed by BT Sport with 32%. They are more likely than the average to consume any type of Online VOD. They index lower on PC's and Laptops, but higher on OTT devices and Smart TV's.



Usage Trends » Regular EST usage by digital platform

iTunes' position as the service attracting the most regular purchasers has now been taken by Sky Store. 12% of the population claim to have purchased from Sky Store in the last month. Interestingly, 6% of these purchased from Buy & Keep; the version of Sky Store that exists on Sky set top boxes. Without the B&K figures Sky Store would be at 8%, so evidence is mounting that the ability to purchase digital content directly on a set top box has traction, and is converting new digital transactors.

Used EST service in last month amongst UK Online Population



The Decipher Media Research Team



Dr Hamish McPharlin

Director | Decipher Media Research

hamish.mcpharlin@decipher.co.uk

Hamish is Director of Decipher Media Research. He has conducted market & consumer research since 2003, and joined Decipher in 2007; working with a large number of broadcasters, platforms, trade bodies and agencies. Has extensive qualifications in both qualitative and quantitative disciplines from experience and training. He has a Bachelor of Marketing and the Media with First Class Honours, and a PhD in Communications. He has won several research awards for excellence, including Mediaweek 2008 & 2012, and IAB Europe 2011.



Silvia Santos

Head of Research

silvia.santos@decipher.co.uk

Silvia has over 15 years of research experience. Before Decipher she worked at leading global media owners Time Inc., Disney and JCDecaux. Her relentless curiosity has provided her with extensive experience in both qualitative and quantitative methodologies. As Head of Research at Decipher, Silvia oversees all quantitative fieldwork and insight, and she is also responsible for producing Decipher's bi-annual **mediabug** report, which looks at trends of TV viewing habits as well as the consumer adoption of new technologies in the APAC. She has a BA honours degree from the University of Creative Arts in Media & Cultural studies.



Samantha Eales

Research Executive

sammie.eales@decipher.co.uk

Sammie has a Bachelor of Science degree in Geography from University of Exeter, specialising in Excel modelling. She has worked across various media companies and brings substantial experience of statistical analysis. Her degree has given her a strong foundation in data collection, analysis and producing high-quality quantitative reports with considerable attention to detail.