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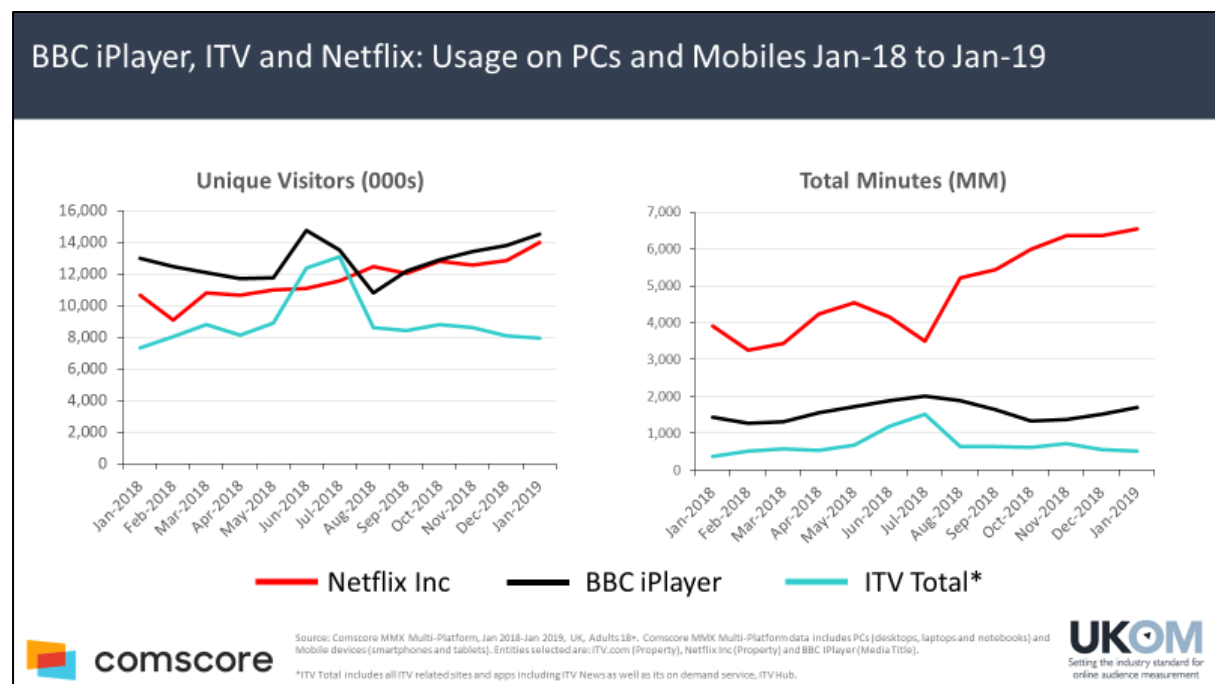Setting the industry standard for
online audience measurement

UKOM Insights

Online Video Streaming Services

The battle of the video streaming services is hotting up as two newcomers are aiming to compete with Netflix. In February, the BBC and ITV announced their new venture, BritBox, and last month global giant Apple announced it is set to enter the race with the launch of Apple TV+.

In the UK, BARB does not identify time spent on Netflix and UKOM-endorsed data from Comscore does not currently cover Smart TVs, so there is little comprehensive comparative data on the video streaming market across all devices and services. However, as below, UKOM-approved data reports monthly audience numbers and duration metrics for online activity across PCs and mobile devices, including smartphones and tablets, for ITV, BBC iPlayer and Netflix. Online video streaming on PCs and mobile devices accounts for a minority share of total time spent viewing but makes a growing contribution and provides a strong indication of performance and trends.

The chart below shows unique visitors and total online time* spent for ITV, BBC iPlayer and Netflix across PC and mobile devices and how usage has changed over the last year. Note that for Netflix and BBC iPlayer it is primarily video content while the ITV total includes all ITV related sites and apps such as ITV News as well as its on demand service, ITV Hub.

BBC iPlayer, ITV and Netflix: Usage on PCs and Mobiles Jan-18 to Jan-19

Source: Comscore MMX Multi-Platform, Jan 2018-Jan 2019, UK, Adults 18+. Comscore MMX Multi-Platform data includes PCs (desktops, laptops and notebooks) and Mobile devices (smartphones and tablets). Entities selected are: ITV.com (Property), Netflix Inc (Property) and BBC iPlayer (Media Title).
*ITV Total includes all ITV related sites and apps including ITV News as well as its on demand service, ITV Hub.

- Netflix and BBC iPlayer are now level for monthly online unique visitors on PC and mobile devices. Both reached over 14 million adults in January 2019, one third of the UK online population.
- Netflix added 3.4 million adult visitors to its PC and mobile services between Jan '18 and Jan '19, a growth of 32%. Netflix growth was higher than BBC iPlayer (+12%) and ITV (+8%).

- Aside from a peak in June and July, attributable to England's progress in FIFA's World Cup, time spent and visitor numbers for ITV was largely flat across the year.
- Netflix continues to grow its total time online on PC and mobile (+67% yr-on-yr). Time spent on Netflix was down in June and July as BBC and ITV benefitted from The World Cup.
- Despite a similar number of visitors, Netflix outperforms BBC iPlayer for time spent. The average time spent per visitor for Netflix across PCs and mobile devices was 466 mins (nearly 8 hrs) in January, up 27% year on year. By comparison, the average time spent on BBC iPlayer was only 117 mins, an increase of only 7%.

The World Cup clearly benefitted ITV and BBC. While the World Cup did not impact the total number of people visiting Netflix via a PC or mobile device, it seems to have had an impact on time spent using the subscription service. Total minutes online on Netflix in July last year, the peak of England's World Cup euphoria, was down 23% compared to May, across PC and mobile devices.

Netflix is not the only challenge facing video streaming businesses. Video services are also up against a number of entertainment and social media apps vying for consumers' screen time. Time spent on *all* mobile apps is up 22% yr-on-yr. Many big players including Spotify, WhatsApp and YouTube continue to grow minutes and new entrants like TikTok are increasingly popular.

The table below looks specifically at mobile app performance of the video streaming services – comparing the growth of the 'free' British video streaming apps - BBC iPlayer and ITV Hub - to the subscription video on demand services (SVOD) from the two leading global players – Netflix and Amazon.

Video Streaming Apps: Unique Visitors and Total Minutes: Jan-18 to Jan-19

	Total Unique Visitors (000)			Total Minutes (MM)		
	Jan-18	Jan-19	% Change	Jan-18	Jan-19	% Change
BBC iPlayer (Mobile App)	7,138	8,579	20	1,343	1,554	16
Netflix (Mobile App)	5,785	8,215	42	1,623	2,686	65
Amazon Prime Video (Mobile App)	2,007	2,890	44	161	465	189
ITV Hub (Mobile App)	2,370	2,802	18	351	473	35

Source: Comscore Mobile Metrix, Jan 18 and Jan 19 data, UK, Age 18+
Please note that 'mobile' includes smartphone and tablet usage combined
For Mobile App Data, the entities selected are: BBC iPlayer, Netflix, Amazon Prime Video and ITV Hub.

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Over the last year, each of four services has grown monthly app user numbers, but Netflix and Amazon Prime Video growth rate was double that of the two free traditional TV broadcasters. Netflix added over 2.4 million new 'mobile app' users between Jan 18 and Jan 19, a growth of 42%. Over the same period, the rate of growth for BBC and ITV, was much slower, at around 20%. Amazon Prime Video's mobile app audience and time spent have grown significantly and it is now on par with the ITV Hub app in terms of monthly viewers and total minutes. In addition to growth from new users, Amazon Prime Video also saw double the average time visitors spent using its mobile app, from 80 mins in

January 2018 to 161 mins in January 2019.   Average time spent on the ITV Hub, BBC iPlayer and Amazon Prime video mobile apps are now all similar – around 2.5 to 3 hours per person per month compared to almost 5.5 hours for Netflix.

Only time will tell how much room the market has for multiple SVOD services and whether Del Boy and Rodney can compete with the glamour of Hollywood. UKOM will continue to track the UK audiences of video streaming services on PCs, smartphones and tablets and will report back when new services have launched.

Notes on Data:

All UK data is based on UKOM industry standard approved Comscore MMX Multi-Platform data across Desktop PCs (including laptops and notebooks) and Mobile devices (smartphones and tablets). Mobile app data is based on Comscore Mobile Metrix. All data is based on UK adults 18+, January 2018-19.

*PC and Mobile Time spent is total time spent online on the service on pcs/desktops and mobile devices - mobile devices includes smartphones and tablets. This includes video and non- video time within the app/website and does not include time spent viewing offline after content has been downloaded. Mobile App time online is time online on smartphone and tablets apps.

For PC and Mobile data, the entities selected are: ITV.com (Property), Netflix Inc (Property) and BBC iPlayer (Media Title). For Mobile App Data, the entities selected are: BBC iPlayer, Netflix, Amazon Prime Video and ITV Hub. Please note that the BBC iPlayer app is tagged. Non tagged apps do not have Android tablet representation but this portion of traffic is relatively small (6.5% of total BBC iPlayer UVs in Jan 19).