

UKOM Insights

Netflix Wins For Time In Mobile Apps

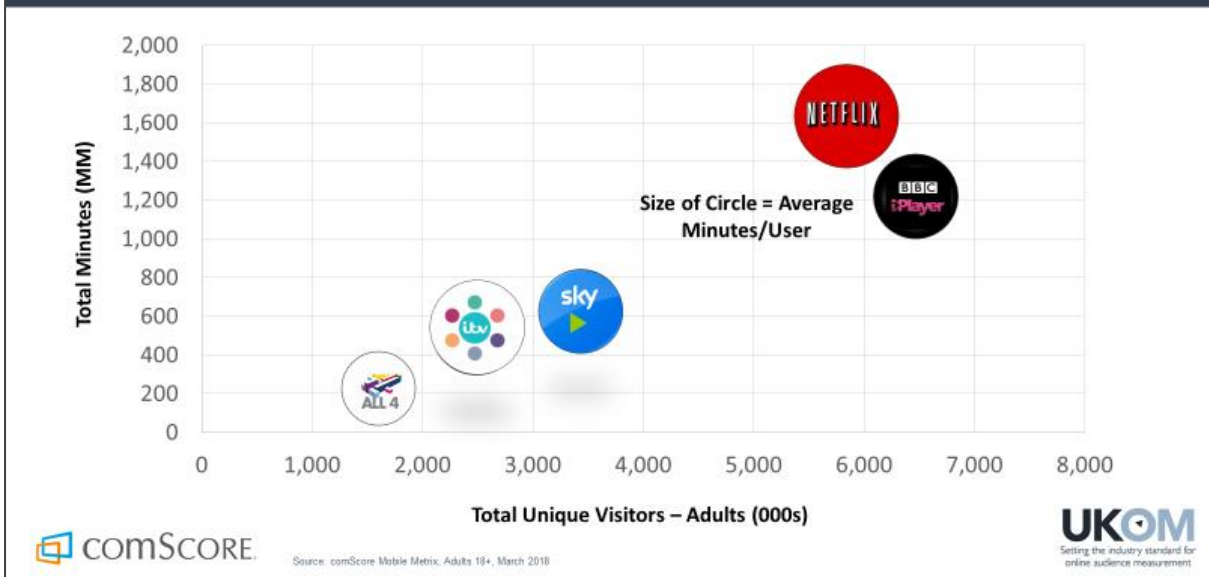
A recent article* focusing on global Netflix data, suggested that 70% of viewing to the service is carried out on a TV set. In the UK there is little visibility of comparative time spent on Netflix vs other broadcast TV channels and services, or how consumption varies across different devices and platforms because the company does not reveal its own data and BARB does not measure time spent on the service. Tablets and smartphones may account for the minority share of Netflix viewing worldwide, but the latest UKOM endorsed comScore data suggests that these devices still generate a significant volume of the time that viewers spend consuming the service's content in the UK.

Looking purely at UK based mobile app data** among adults, UKOM approved comScore data reveals that 5.8 million adults (17% of mobile internet users) accessed the Netflix app on either a smartphone or tablet in March 2018. While this might be lower than the total number who visited the BBC iPlayer app (6.5 million) it is significantly higher than the number of those who visited apps for each of Sky Go, the ITV Hub and All 4. Although BBC iPlayer leads the pack in terms of unique visitors, the total time these visitors spent in the apps paints a different picture. In March 2018, Netflix had higher overall minutes than BBC iPlayer, driven by the higher average minutes among users. Those accessing the BBC iPlayer mobile app spend on average 3 hours per month on the service but visitors to the Netflix app spend over 4½ hours (280 minutes) consuming its content on a mobile device.

	Total Minutes (MM)	Average Minutes /Visitor	Unique Visitors 18+ (000)
Netflix (Mobile App)	1,633	280	5,841
BBC iPlayer (Mobile App)	1,218	188	6,470
Sky Go (Mobile App)	626	182	3,435
ITV Hub (Mobile App)	531	214	2,487
All 4 (Mobile App)	226	141	1,601

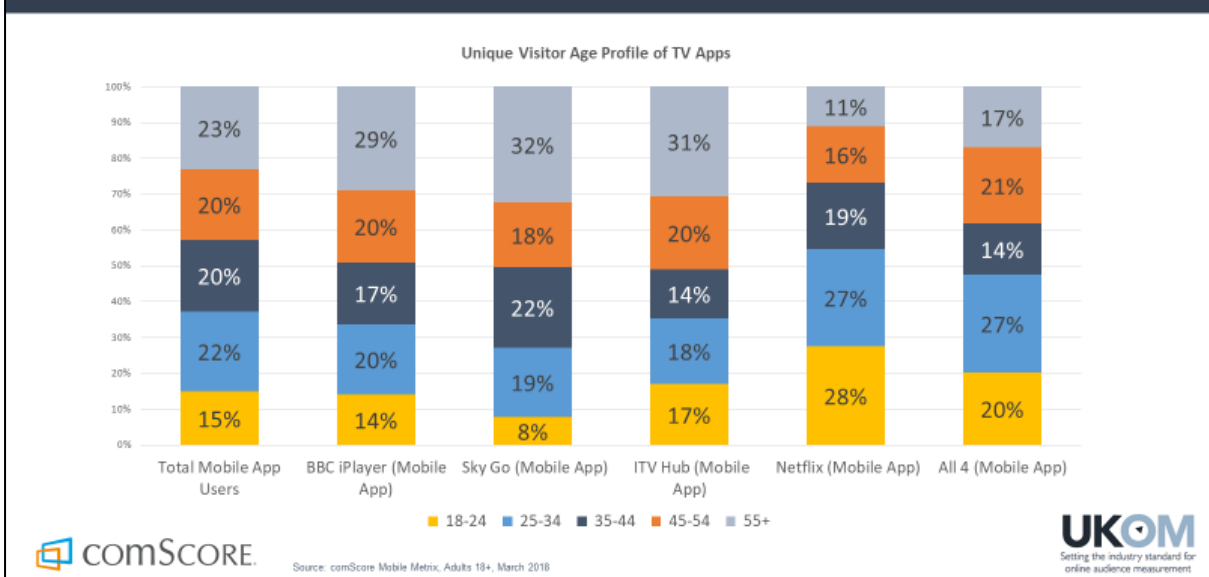
Source: comScore Mobile Metrix, Adults 18+, March 2018

Audience & Time Spent: TV Apps on Mobile Devices March 2018



The demographic profile of app users might go some way to explain the differences in usage. Netflix app visitors tend to be younger than visitors to the traditional broadcaster TV apps and the service has a much younger profile than the total mobile app universe. 55% of adult Netflix app users are aged under 35 compared to only 37% of all app users. Less than 40% of the adult audience for BBC iPlayer, Sky Go and ITV are aged 18-34 and they make up only 47% of All 4's mobile app users, which has the youngest profile of the traditional TV providers.

Visitor Age Profile of TV Apps in March 2018



Overall, UKOM total market data shows us that 18-34s spend most time on mobile apps – although they only account for 37% of mobile app users, they generate 44% of mobile app minutes and average time spent within apps decreases with increasing age.

Age is one demographic variable which differentiates mobile TV app usage but it is not the only one. The TV apps also have profile differences for both gender and presence of children. For example, given the significant presence of sport, it is probably no surprise that Sky Go was the only TV app which had a male bias (54% of users). UKOM is unable to drill down to programme level but it is likely that demographic profiles could change according to content genre and this could vary from month to month.

Measuring total TV viewing across all platforms remains challenging and there are a vast number of factors which influence why and when consumers choose a mobile device to view TV. Content genre, cost, speed of online connection, screen availability, location, desire to multi-task & convenience are just some of them but platform usage is clearly impacted by demographics. comScore's mobile app data which is endorsed by UKOM, can provide a good proxy for mobile TV viewing by telling us how many, who and how long for TV apps, both across smartphones and tablet devices.

For a more granular look at actual online video or TV viewing, in 2017 UKOM endorsed comScore's Video Metrix Multi-Platform methodology. This is limited to broadcasters and online publishers that choose to tag, but it does mean that there is now an independent UK industry standard for the measurement of online video audience across desktops, smartphones and tablets.

*<https://www.recode.net/2018/3/7/17094610/netflix-70-percent-tv-viewing-statistics>

**Mobile apps are measured when they are active and/or making server calls to display content, through panel measurement and census where the comScore tag is implemented. Duration covers the period when the app is in the foreground for use and stops when the app is closed or moves to the background of the screen. TV mobile app time is a good proxy for video viewing but will include any time spent in the app and is not limited solely to videos playing. All data in this analysis is based on adults 18+ and March 2018.