



THE UK TELEVISION LANDSCAPE REPORT

A quarterly review of population
trends and changes in how people
can watch television

Q3 2017



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We track the metrics which define the TV landscape

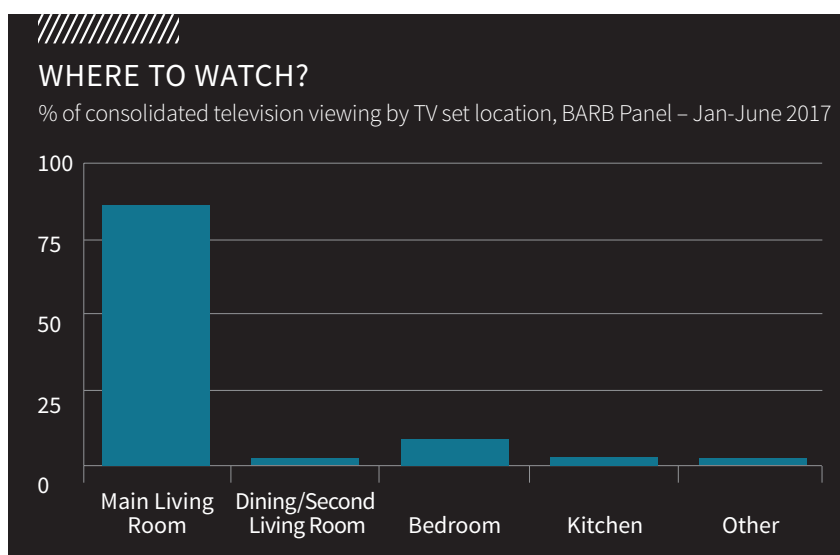


**THE PRIMARY
ROLE OF
SECONDARY
TV SETS**



THE PRIMARY ROLE OF SECONDARY TV SETS

Every year we purchase around ten million TV sets in the UK, and this number has been largely unchanged for some time. In Q3 this year, our Establishment Survey found that there are over 53 million TV sets in households across the UK; not quite one per person, but an average of 1.9 sets per home. Our previous research has shown that we are investing in bigger TV sets for the main living room, but what about the TV sets that we use as secondary sets, be it in the bedroom, kitchen or study?



We know from our panel data that television is not just for the living room, and whether it's because another member of the household is watching the main set, or because you're watching TV in bed, secondary set viewing accounts for around 14% of all consolidated 7-day TV set

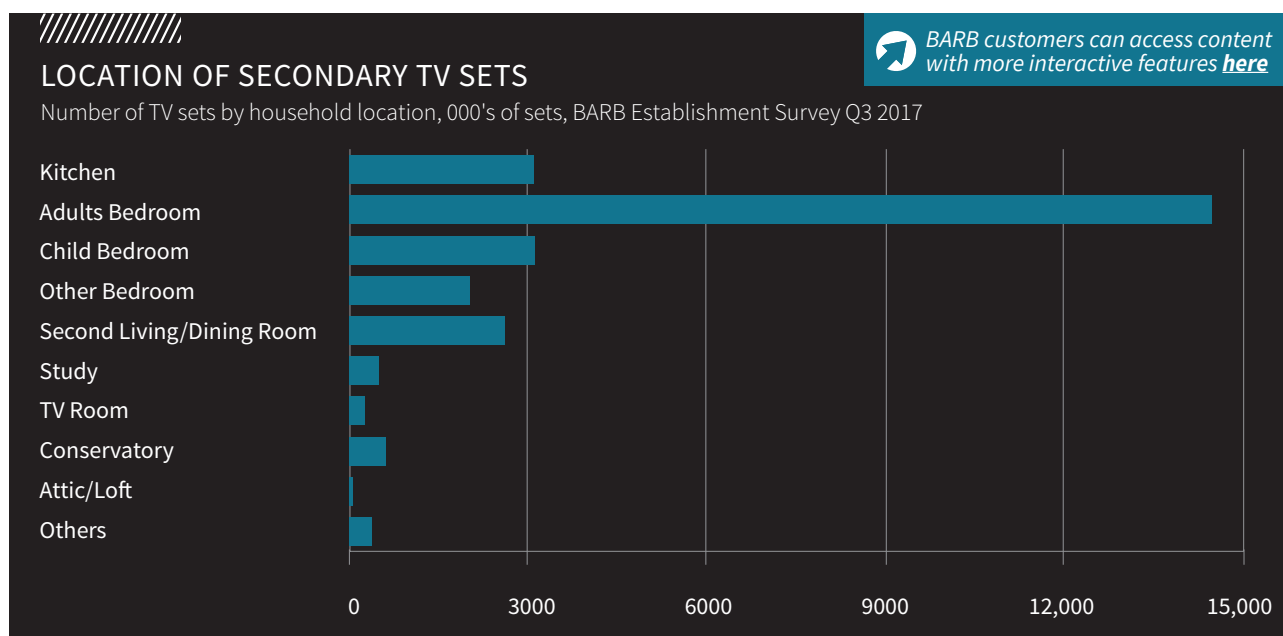
viewing in the UK.

So, it's clear that secondary TV sets are a vital source of the television we love to watch. Despite the widespread availability of new computer devices on which to watch television, the proportion of TV set viewing on

secondary sets is actually marginally up on the same period in 2010.

But just where do we place our secondary sets, which type of household has them and how are they changing? As usual, our Establishment Survey can explain all.

WHERE ARE SECONDARY TV SETS PLACED?



Viewing data shows that, given the chance, our preference is to watch television in our main living room, relaxing on the sofa in front of the big screen. However, that is not always possible, perhaps due to

disagreements on what to watch with others in your household, or for reasons related to circumstance and timing. This is reflected in the most common location of additional TV sets within the home. There are nearly

14.5 million sets located in adults' bedrooms, where we can watch breakfast TV as we get ready for work, or perhaps so we can hide under the covers when watching a scary late-night movie!

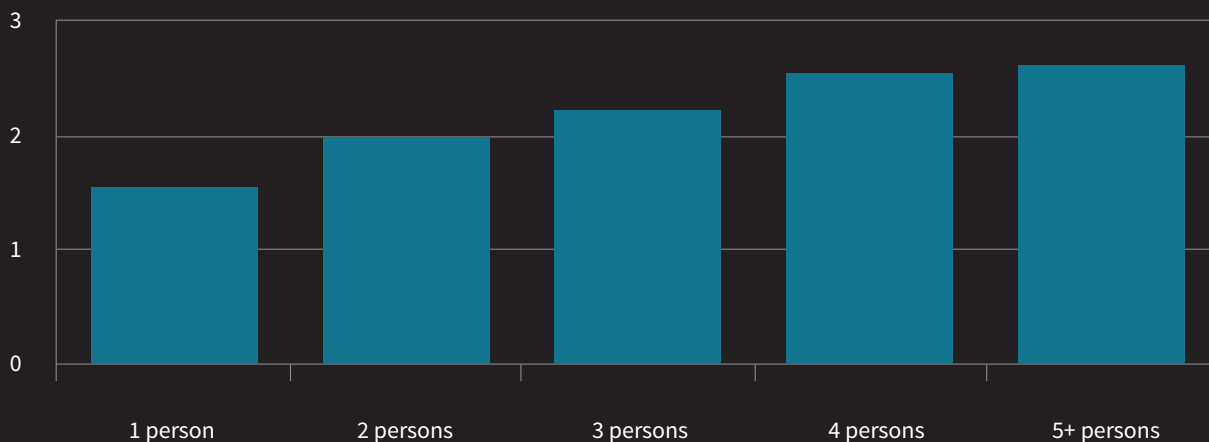


WHICH TYPE OF HOUSEHOLD HAS SECONDARY TV SETS?



HOUSEHOLD SIZE

Average number of TV sets by size of household, BARB Establishment Survey Q3 2017



Although being able to watch TV in another room is a luxury of convenience, it's apparent from our data that it is also likely to be a necessity. Household members' desire to watch different programmes

can often lead to disagreement on which programme is chosen, and we also like to watch the majority of television live, together with the rest of the UK. Looking at the chart above, we can see that as the number

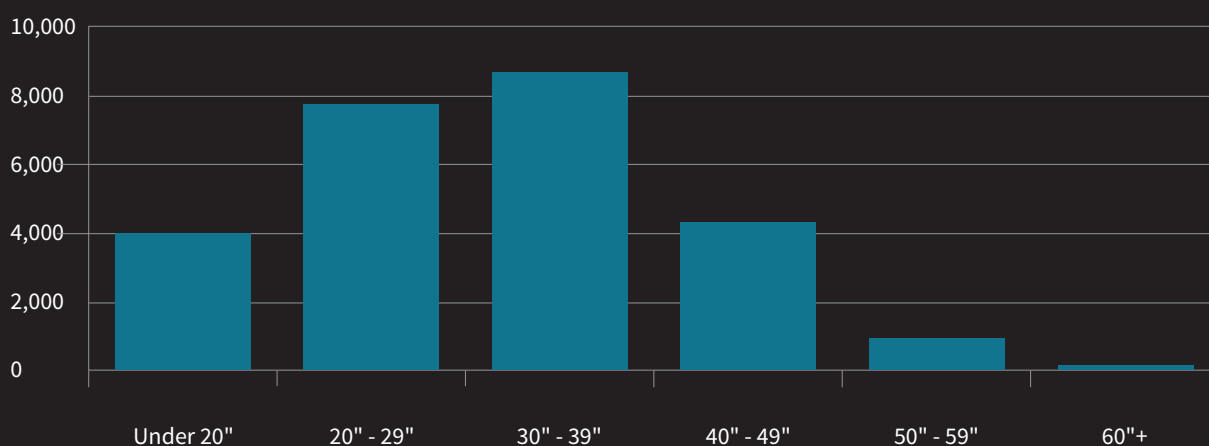
of people in the home increases, so too does the average number of TV sets. This suggests that multiple TV sets are necessary for household members to watch the wide variety of TV programming available.

HOW ARE SECONDARY TV SETS CHANGING?



SECONDARY TV SET SCREEN SIZE

Number of secondary TV sets by screen size, 000's of sets, BARB Establishment Survey Q3 2017



BARB customers can access content with more interactive features [here](#)

Our previous research has found that households are getting progressively larger TV sets for their main living room, but what about secondary TV sets? We can see that secondary TV sets are also increasing in size,

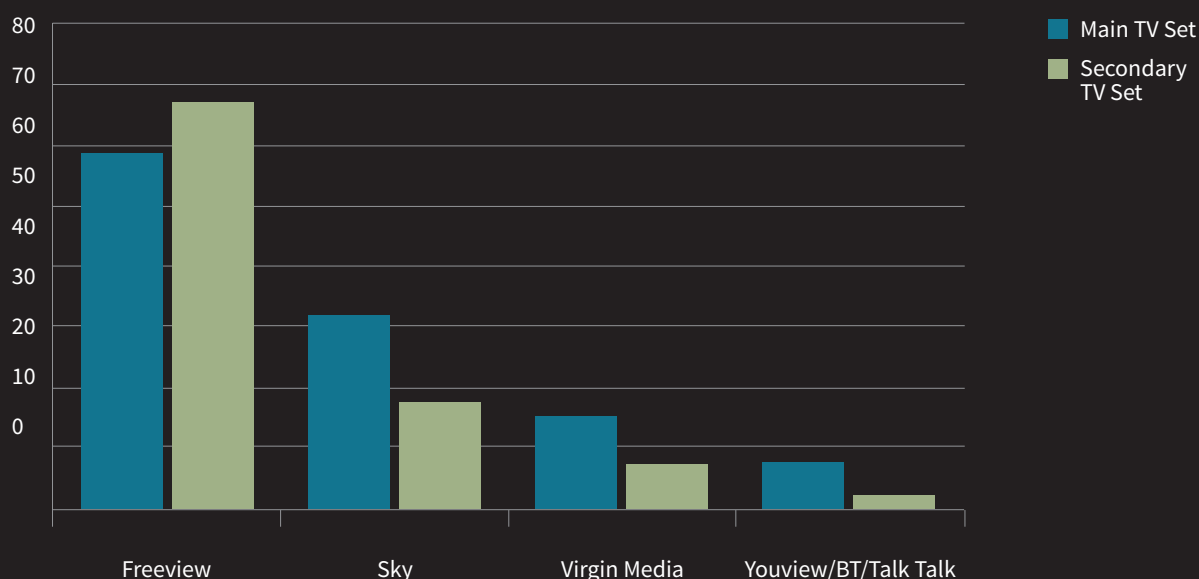
perhaps due to households taking advantage of wall bracketing in bedrooms, or the opportunity to move the old main TV set into another room. Today, nearly 20% of all secondary TV sets are at least 40

inches wide; in Q3 2010, this figure was only 3.2%, highlighting the sheer scale of transition and importance that secondary TV sets have in our homes and in our lives.



SECONDARY TV SET PLATFORM OPERATOR

% of secondary TV sets by platform operator, BARB Establishment Survey Q3 2017



Well over 50% of households in the UK pay for broadcast television services, so it is clear that channel line-up is very important to us. However, traditional distribution techniques through cabling and set-top boxes have meant that extending pay-TV services to more than one room in the home has not only been costly but also physically difficult. As such, when we look at the platforms available on secondary TV sets, we can see a significant divergence from the main TV sets.

Whereas the majority of main TV sets get their TV services from pay-TV operators, for secondary TV sets, this stands at just 27%. 32% of main TV sets have a Sky box attached, but for secondary TVs this figure is just 18%. Likewise, only 7% of secondary TV sets receive Virgin Media, compared to 15% of main TV sets. The result is that Freeview is the dominant platform for TV channel selection on secondary sets. Of course, the way in which we get our television is now changing, with platform providers now offering easier in-home network distribution

of content to multiple TV sets, so it will be interesting to see whether this pattern changes over time.

The way in which we watch television is changing, but in amongst all of the new distribution techniques, platforms and technologies remains the constant that drives 99% of all viewing: the TV set. And whether its the 50-inch TV screen in the main living room or the 30-inch secondary set in the bedroom, TV sets remain the primary and fundamental method of consuming the UK's favourite medium, television.



TV LANDSCAPE TRACKERS

The UK Television Landscape Report tracks key metrics which define the television landscape over time. The trackers feature in each edition of the report, and we will add to the number of trackers as we go.

Tracking key metrics offers insights into the changing nature of the UK TV landscape. In many cases, the pace is slow; the question is, how steady?

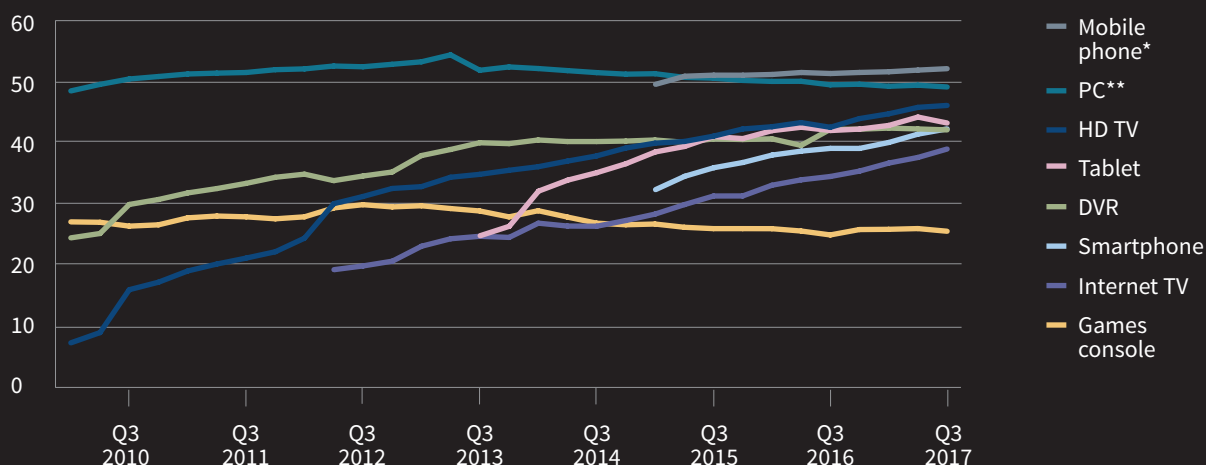


DEVICE ACCESS

DEVICE ACCESS

Q1 2010 - Q3 2017, millions of individuals

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The Establishment Survey considers devices on a household level, so if any member of a household owns a device, then every member of that household is considered to have access. The one exception to this is mobile phones (including smartphones), which are considered to be individual devices, so if a household member owns a mobile phone, other members of the household are not considered to have access.

*The figures for mobile phones include smartphones
 **The figures for PC include tablets up to Q2 2013

Growth in smart (internet) TVs within UK households continues, with over 39m households now with an internet

TV. It is likely at current growth rates that access to smart TVs will overtake PVRs in 2018. HD TV ownership

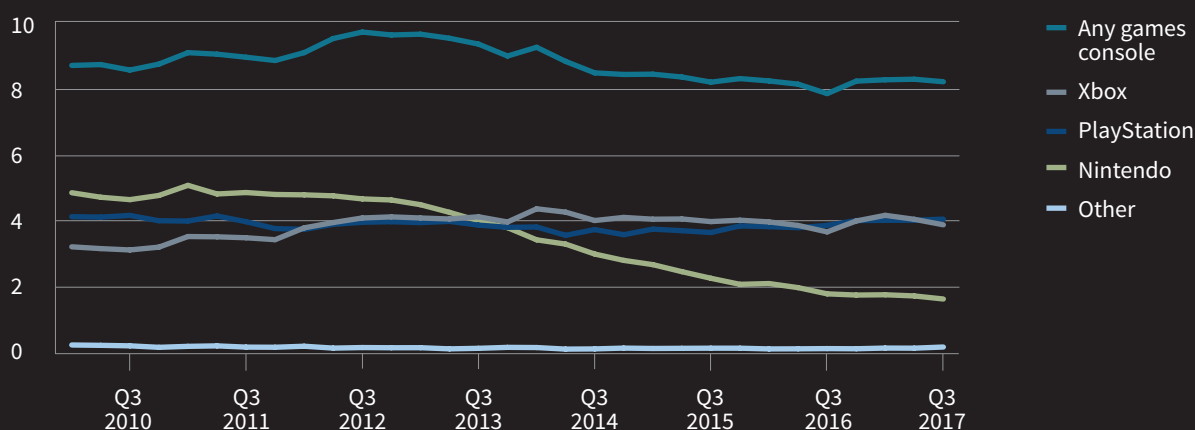
continues to grow as late adopters replace old legacy TV sets, with 46m households now watching in HD.

GAMES CONSOLE HOUSEHOLDS

GAMES CONSOLE HOUSEHOLDS

Q1 2010 - Q3 2017, millions of households

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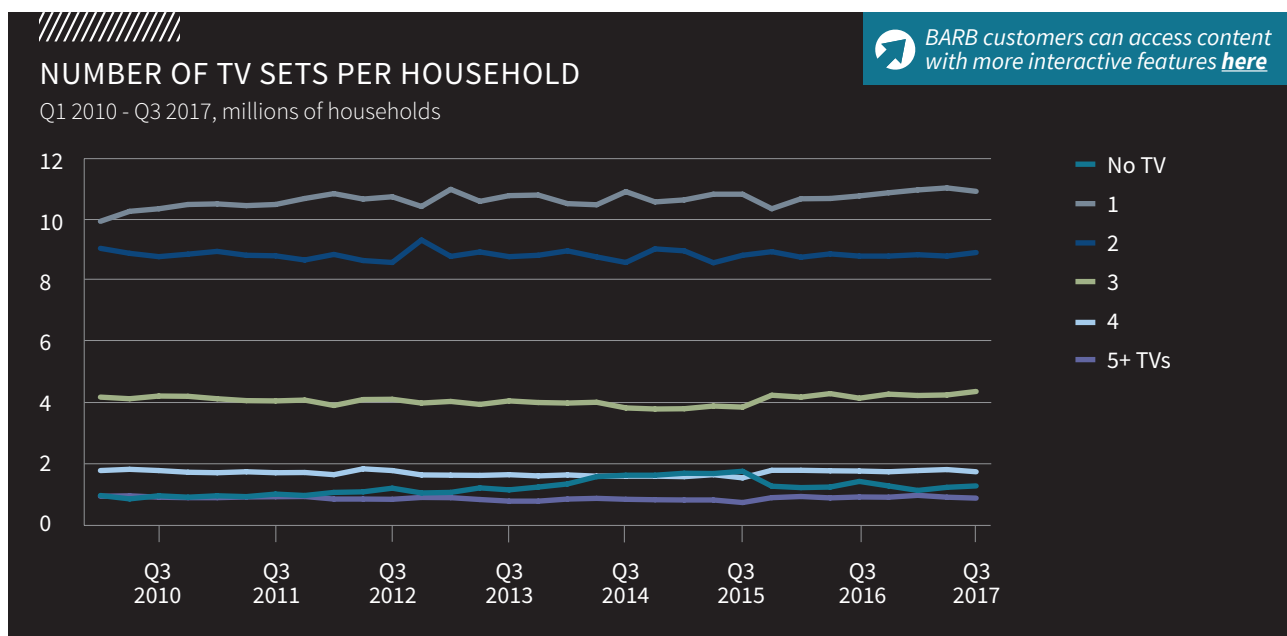
The games console tracker follows the number of homes with a games console connected to a TV set. The Establishment Survey tracks

each generation of the three main console brands: Sony PlayStation, Microsoft Xbox and Nintendo. Overall ownership of games consoles is

holding steady at 8.2m households. We featured the recent declines in ownership in the Q1 2016 edition of the UK Television Landscape Report.



NUMBER OF TV SETS PER HOUSEHOLD



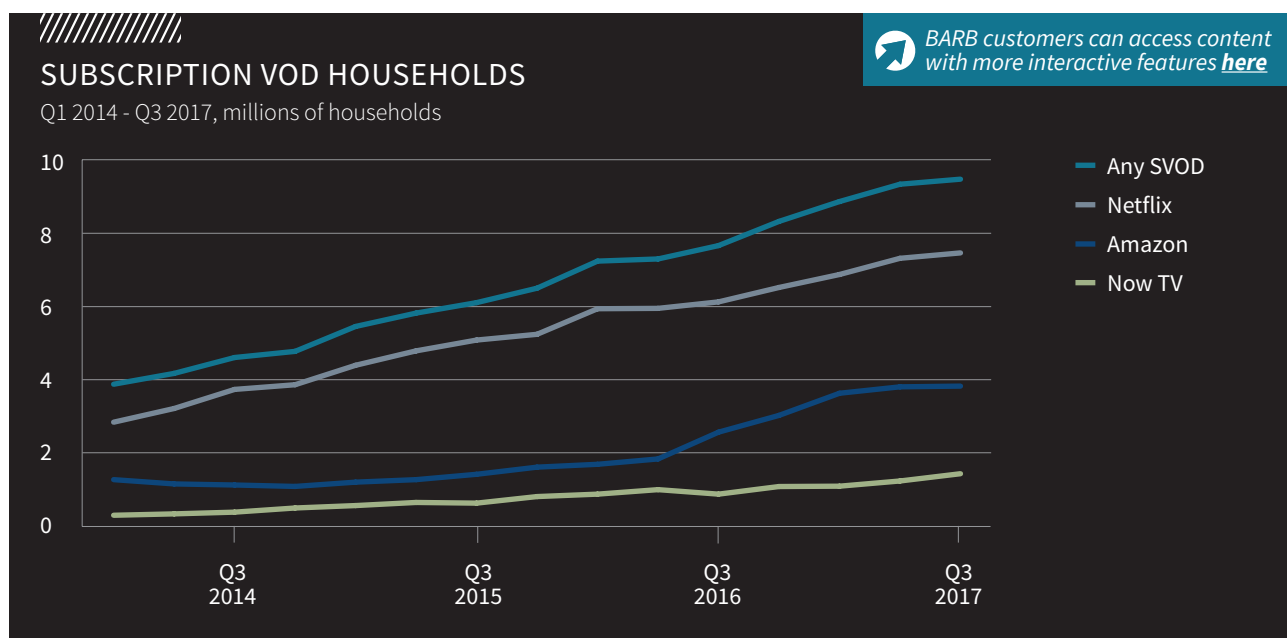
The definition of a working TV set changed at the end of 2015. Sets which respondents claimed had not been used to watch TV over the past six months and sets for which

respondents could not specify the means of reception (cable, satellite, terrestrial, etc.) are now included in the definition. A detailed description of the change in definition can be

found [here](#).

In Q3 2017, it was estimated that there were 1.3m households without a TV set.

SUBSCRIPTION VOD HOUSEHOLDS



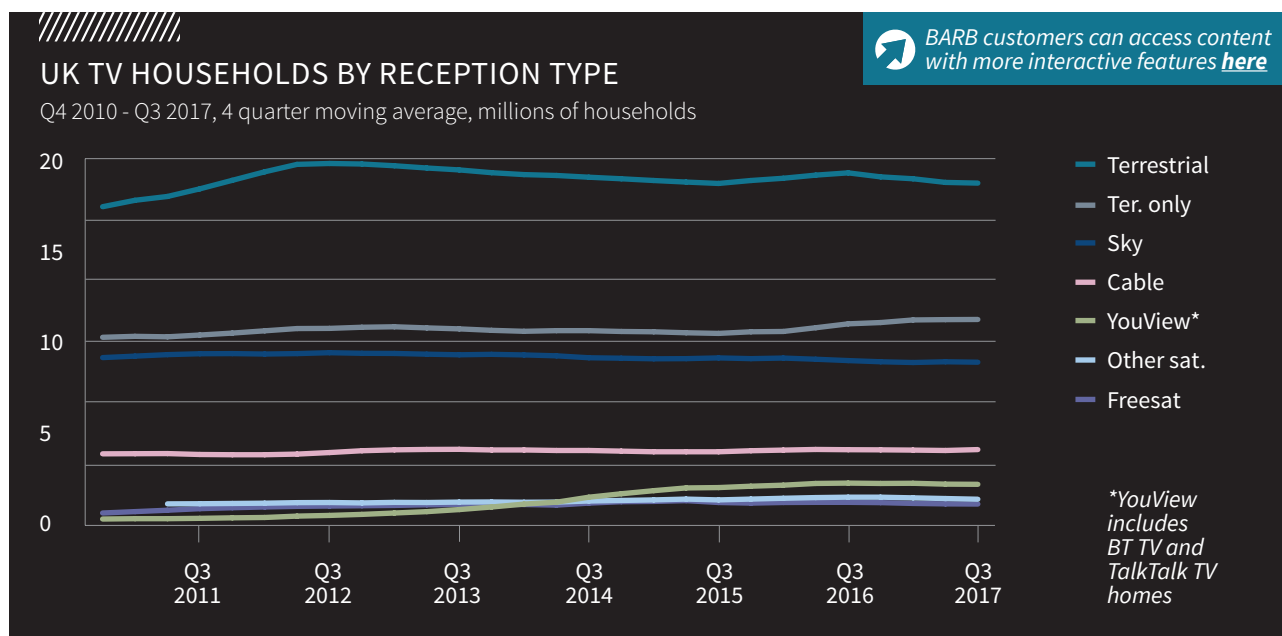
Access to subscription VOD services grew at the slowest rate for the last 12 months with a quarterly increase of 1.5% in Q3 2017, with just over 9.5m households subscribing to at

least one of these services. Amazon Video grew at the slowest pace in the latest quarter at just 0.5% and is now available in more than 3.8m subscribing households. Netflix,

available in 7.5m homes, grew at 2% in the quarter. Now TV grew strongly at 17% and is available in over 1.4m households.



UK HOUSEHOLDS BY TV PLATFORM



This tracker focuses on the platforms viewers use to watch linear TV. The platform categories used are as follows.

Cable: households that claim to receive cable; these households are almost entirely Virgin Media customers.

Freesat: homes which have access to Freesat, either through a set top box or integrated into the TV set. This does not include former Sky homes who do not have a live subscription but continue to use their Sky set top box to watch free satellite channels.

Other satellite: this category includes former Sky subscribers as well as viewers watching smaller, typically international, satellite service providers like Polsat.

Sky subscription: homes who pay for a Sky subscription package (not including Now TV customers who don't pay for a Sky subscription package).

Terrestrial: all homes which have access to digital terrestrial TV via their aerials. This includes any homes across all categories which also have access to terrestrial.

Terrestrial only: the subset of terrestrial households that do not have access to either cable or satellite reception. This includes most BT TV, TalkTalk TV and YouView homes.

YouView: all households who have the BT, TalkTalk or YouView platforms. The great majority of these homes will be using the YouView interface, but the figure will include a small number of homes using older versions of BT TV and TalkTalk TV.

