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Measuring and Understanding Public Opinion:

Viewing Live TV

December 2016

This public opinion data has been collected and analysed by NEMS from a survey of representative sample of UK adults conducted through NEMS Market Research's telephone omnibus, a national survey of 1000 adults conducted every week.

More details of our omnibus service can be found at:

<http://www.nemsmr.co.uk/omnibus/default.aspx>

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Viewing Live TV

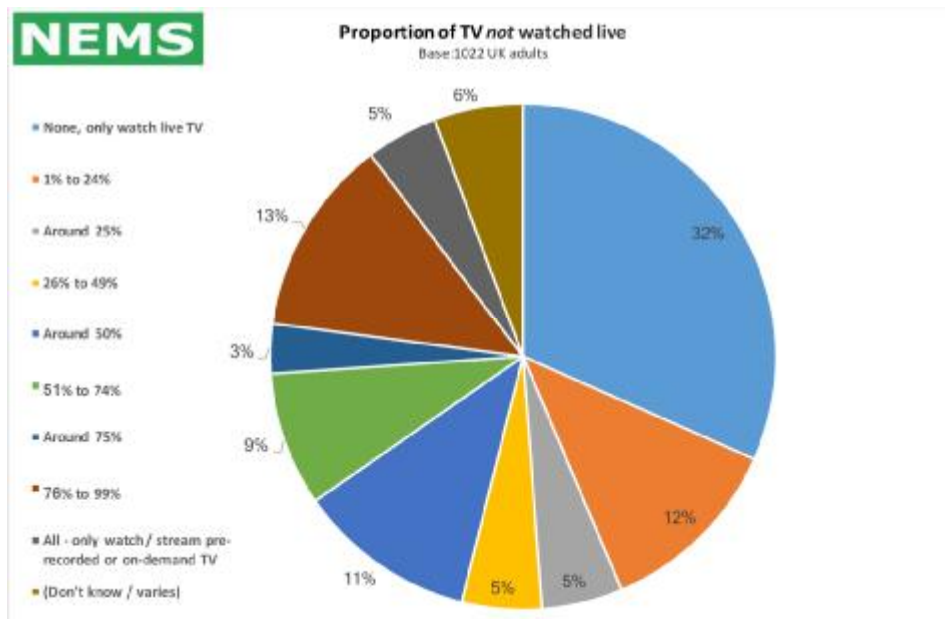
SPEED READ

- 1 in 20 of us never watch anything live
- 1 in 3 of us only watch TV live
- On average 36% of TV viewing is recorded / streamed / box sets, etc.
- Females, the younger age groups and the ABC1s are the most ardent fast forwarders
- This behaviour represents a challenge for media owners and advertisers alike.

Viewing Live TV

32% of the UK population only ever watch live TV, increasing to 48% among those aged 55+. Including pre-recorded TV, streaming, box sets, etc, 5% of the population watch all their TV, i.e. none of it live. This is more popular among the 16-34 year olds, where 1 in 11 watch TV in this manner.

In between these two extremes are 12% of adults who watch up to a quarter of all their TV viewing not live, the same proportion who watch around half their TV viewing not live and 13% of adults watch about three quarters of programmes not live.



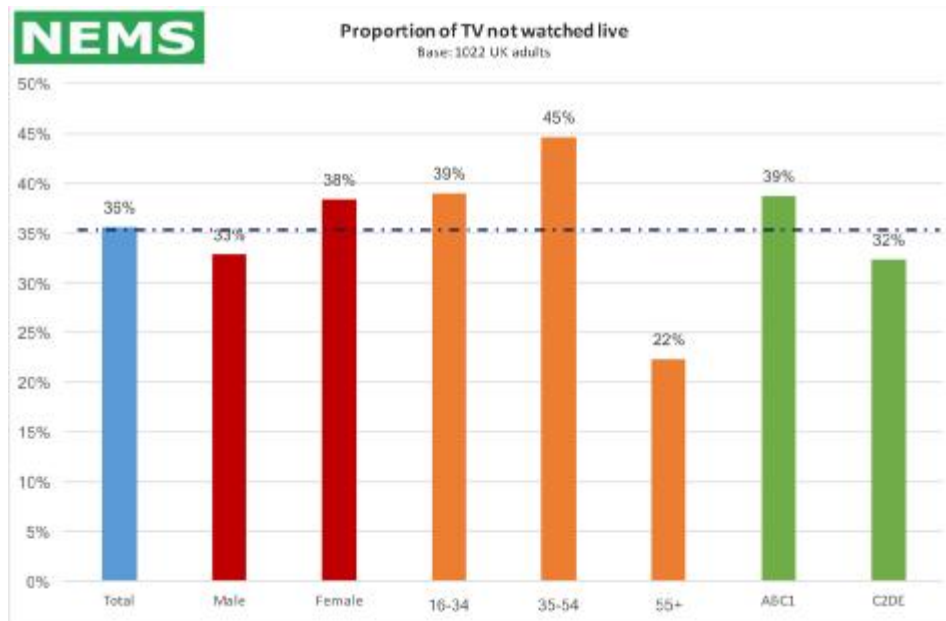
Proportion of TV not viewed live

The mean percentage of TV watched recorded is 36%.

However, as can be seen in the chart below there are noticeable differences between the different demographic groups.

Women are more likely than men to watch TV that has been recorded, those aged 35-54 are the most likely to watch their TV after it has been broadcast, in fact this how almost half the population in this age group watch their TV, whereas just over a fifth of the population aged 55+ watched their TV after it has been broadcast.

ABC1s watch more of their TV recorded than C2DEs.

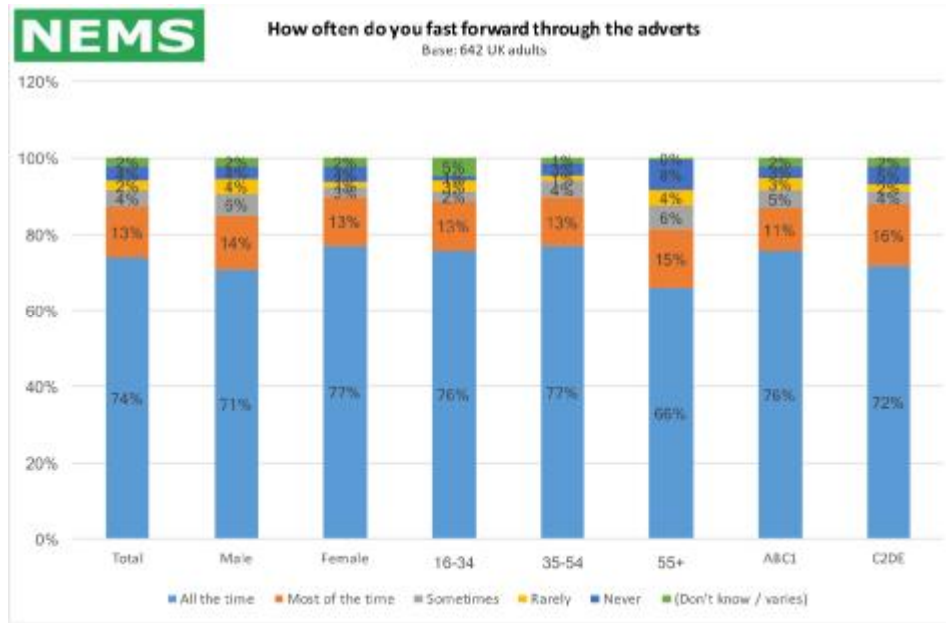


Frequency of fast forwarding through the adverts

Among those who watch pre-recorded TV, fast forwarding through the adverts is something that is done all the time by three out of four people.

More women than men fast forward all the time and those aged 55+ are least likely to behave this way.

Among the prime target audience of ABC1s, sadly for advertisers this group is more likely than C2DEs to fast forward.



Weighted:

Viewing live TV

December 2016

	Total	Male	Female	16-34	35-54	55+	ABC1	C2DE								
Mean score (% of non-live TV watched):																
Q01 Thinking now about your television viewing, what proportion would you say is not watched live, i.e. you have recorded it to watch later, even if just a few minutes, or say box sets or on-demand?																
None, only watch live TV	31.6%	323	30.1%	156	33.2%	168	29.1%	97	19.0%	67	47.8%	159	26.6%	136	36.7%	188
1% to 24%	12.0%	122	15.0%	78	8.9%	45	6.8%	23	16.4%	58	12.5%	42	12.7%	65	11.3%	58
Around 25%	5.2%	53	7.2%	37	3.1%	16	7.4%	25	4.0%	14	4.1%	14	5.8%	30	4.5%	23
26% to 49%	5.1%	52	5.4%	28	4.8%	24	5.0%	17	4.6%	16	5.8%	19	6.2%	32	4.0%	21
Around 50%	11.4%	117	10.4%	54	12.5%	63	8.3%	28	16.8%	59	8.9%	30	13.3%	68	9.6%	49
51% to 74%	8.6%	88	8.6%	44	8.6%	43	12.2%	41	9.3%	33	4.2%	14	9.6%	49	7.6%	39
Around 75%	3.2%	33	3.2%	17	3.1%	16	3.9%	13	3.5%	13	2.0%	7	2.7%	14	3.7%	19
76% to 99%	12.6%	129	11.2%	58	14.1%	71	14.2%	47	17.0%	60	6.5%	22	13.5%	69	11.7%	60
All - only watch / stream pre-recorded or on-demand TV (Don't know / varies)	4.6%	47	2.9%	15	6.3%	32	4.0%	13	7.1%	25	2.5%	8	5.5%	28	3.7%	19
<i>Mean:</i>		35.60		32.86		38.38		39.03		44.64		22.29		38.73		32.37
Weighted base:		1022		517		505		334		355		333		510		512
Sample:		1022		499		523		98		431		493		560		462

Mean score: [All the time = 5, Most of the time = 4, Sometimes =3, Rarely = 2, Never = 1]

Q02 When you watch something which is not live, how often do you then fast forward through any adverts / commercial breaks? [PR]*Those who watch pre-recorded TV*

All the time	73.9%	473	70.9%	234	77.1%	239	75.8%	157	76.8%	214	66.0%	102	75.6%	267	71.8%	206
Most of the time	13.4%	86	14.1%	46	12.6%	39	12.9%	27	12.7%	35	15.3%	24	11.2%	40	16.0%	46
Sometimes	4.2%	27	5.8%	19	2.6%	8	2.5%	5	4.4%	12	6.2%	10	4.8%	17	3.5%	10
Rarely	2.4%	16	3.5%	12	1.3%	4	2.8%	6	1.2%	3	4.2%	6	3.1%	11	1.7%	5
Never	3.8%	25	3.6%	12	4.1%	13	1.5%	3	3.4%	9	7.9%	12	3.2%	11	4.7%	13
(Don't know / varies)	2.2%	14	2.1%	7	2.3%	7	4.6%	10	1.4%	4	0.5%	1	2.2%	8	2.3%	7
<i>Mean:</i>		4.55		4.48		4.61		4.66		4.61		4.28		4.56		4.52
Weighted base:		641		330		310		207		279		155		353		287
Sample:		642		319		323		65		334		243		394		248

SEX Sex of respondent

Male	50.6%	517	100.0%	517	0.0%	0	52.2%	175	52.0%	184	47.3%	158	53.3%	272	47.8%	245
Female	49.4%	505	0.0%	0	100.0%	505	47.8%	160	48.0%	170	52.7%	175	46.7%	238	52.2%	267
Weighted base:		1022		517		505		334		355		333		510		512
Sample:		1022		499		523		98		431		493		560		462

AGE To ensure we get a representative sample, could I ask how old you are ?

16 to 24	15.2%	155	15.9%	82	14.4%	73	46.3%	155	0.0%	0	0.0%	0	15.1%	77	15.2%	78
25 to 34	17.6%	179	17.9%	92	17.2%	87	53.7%	179	0.0%	0	0.0%	0	19.7%	101	15.4%	79
35 to 44	18.4%	188	18.9%	98	17.9%	90	0.0%	0	53.0%	188	0.0%	0	21.0%	107	15.8%	81
45 to 54	16.3%	167	16.8%	87	15.8%	80	0.0%	0	47.0%	167	0.0%	0	17.1%	87	15.5%	79
55 to 64	13.1%	134	13.4%	69	12.8%	65	0.0%	0	0.0%	0	40.2%	134	10.6%	54	15.6%	80
65 +	19.5%	199	17.1%	88	21.9%	111	0.0%	0	0.0%	0	59.8%	199	16.4%	84	22.6%	115
Weighted base:		1022		517		505		334		355		333		510		512
Sample:		1022		499		523		98		431		493		560		462

SEG Socio-economic group

A	2.6%	26	3.4%	17	1.8%	9	1.9%	6	3.4%	12	2.4%	8	5.2%	26	0.0%	0
B	16.1%	164	16.5%	85	15.7%	79	17.8%	59	18.0%	64	12.4%	41	32.2%	164	0.0%	0
C1	31.3%	320	32.8%	169	29.7%	150	33.5%	112	33.5%	119	26.6%	89	62.6%	320	0.0%	0
C2	22.9%	234	25.4%	131	20.4%	103	23.3%	78	24.7%	88	20.7%	69	0.0%	0	45.8%	234
D	13.4%	137	12.4%	64	14.4%	73	14.8%	49	14.2%	50	11.1%	37	0.0%	0	26.7%	137
E	13.7%	140	9.6%	49	18.0%	91	8.7%	29	6.2%	22	26.8%	89	0.0%	0	27.5%	140
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1022		517		505		334		355		333		510		512
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Weighted:

December 2016

	Total	Male	Female	16-34	35-54	55+	ABC1	C2DE								
EMP Which of the following best describes your current employment status ? [PR]																
Working full-time (30+ hours a week)	44.8%	458	58.4%	302	31.0%	156	51.2%	171	65.0%	231	17.0%	56	50.3%	257	39.4%	202
Part-time	14.1%	144	7.5%	39	20.9%	106	12.3%	41	19.4%	69	10.3%	34	15.5%	79	12.7%	65
Not working - e.g. full-time student, not looking for work, unemployed (excluding retired / invalid)	15.2%	155	12.3%	63	18.2%	92	33.1%	111	8.8%	31	4.0%	13	13.2%	67	17.2%	88
Not working (retired / invalid)	24.8%	253	19.7%	102	30.0%	151	1.1%	4	5.8%	21	68.7%	229	21.0%	107	28.5%	146
(Refused)	1.1%	11	2.2%	11	0.0%	0	2.3%	8	1.0%	3	0.0%	0	0.0%	0	2.2%	11
Weighted base:		1022		517		505		334		355		333		510		512
Sample:		1022		499		523		98		431		493		560		462
ADU How many adults aged 16 years or older, including yourself, live in your household ?																
One	23.2%	237	23.5%	121	22.9%	116	14.0%	47	18.7%	66	37.2%	124	20.5%	105	25.8%	132
Two	46.3%	474	44.6%	230	48.2%	243	41.7%	139	50.3%	179	46.8%	156	53.4%	272	39.3%	201
Three	20.0%	205	21.8%	113	18.2%	92	32.6%	109	17.6%	63	10.0%	33	17.5%	89	22.6%	116
Four	7.0%	71	6.5%	34	7.5%	38	7.7%	26	10.4%	37	2.6%	9	5.7%	29	8.2%	42
Five	1.6%	17	1.6%	8	1.7%	8	2.5%	8	1.6%	6	0.8%	3	1.1%	6	2.1%	11
Six or more	0.6%	6	0.3%	2	0.9%	4	0.8%	3	0.5%	2	0.5%	2	0.3%	2	0.8%	4
(Refused)	1.3%	13	1.7%	9	0.8%	4	0.7%	2	0.9%	3	2.3%	8	1.5%	8	1.1%	5
Weighted base:		1022		517		505		334		355		333		510		512
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CHI How many children live in your household, aged 15 years and under ?																
None	70.8%	724	73.4%	379	68.2%	345	66.7%	223	51.8%	184	95.1%	317	67.9%	346	73.7%	377
One	13.6%	139	10.5%	54	16.9%	85	19.3%	65	19.3%	68	2.0%	7	13.0%	66	14.3%	73
Two	9.8%	100	9.1%	47	10.5%	53	7.7%	26	20.7%	74	0.2%	1	12.7%	65	6.8%	35
Three	3.4%	35	4.8%	25	2.0%	10	2.9%	10	6.6%	23	0.5%	2	3.8%	19	3.1%	16
Four	0.5%	5	0.5%	3	0.5%	2	1.4%	5	0.1%	0	0.0%	0	0.8%	4	0.2%	1
Five	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Six or more	0.2%	2	0.1%	0	0.3%	2	0.0%	0	0.6%	2	0.0%	0	0.4%	2	0.0%	0
(Refused)	1.7%	17	1.7%	9	1.6%	8	1.9%	6	0.9%	3	2.2%	7	1.5%	8	1.8%	9
Weighted base:		1022		517		505		334		355		333		510		512
Sample:		1022		499		523		98		431		493		560		462
HLD Size of household																
One	19.9%	203	21.9%	113	17.9%	90	9.5%	32	13.7%	49	36.9%	123	16.7%	85	23.1%	118
Two	33.6%	343	31.6%	163	35.6%	180	31.6%	106	24.4%	87	45.4%	151	35.6%	181	31.6%	162
Three	18.1%	185	18.8%	97	17.4%	88	24.4%	82	19.2%	68	10.6%	35	20.0%	102	16.2%	83
Four	18.8%	192	18.0%	93	19.6%	99	23.1%	77	29.4%	104	3.1%	10	17.6%	90	20.0%	102
Five or more	7.9%	81	8.0%	41	7.9%	40	9.5%	32	12.3%	44	1.7%	6	8.6%	44	7.3%	37
(Refused)	1.7%	17	1.7%	9	1.6%	8	1.9%	6	0.9%	3	2.3%	8	1.5%	8	1.9%	10
Weighted base:		1022		517		505		334		355		333		510		512
Sample:		1022		499		523		98		431		493		560		462
IS2 ISBA region																
Ulster	2.6%	26	1.2%	6	4.0%	20	1.7%	6	1.8%	6	4.2%	14	2.1%	11	3.0%	15
Scotland	8.8%	89	9.5%	49	8.0%	40	8.1%	27	8.2%	29	10.0%	33	9.3%	48	8.2%	42
North / Borders	6.3%	64	5.0%	26	7.6%	39	5.2%	17	6.5%	23	7.2%	24	6.2%	31	6.4%	33
Lancashire	11.3%	115	10.7%	55	11.8%	60	11.1%	37	11.5%	41	11.1%	37	12.0%	61	10.5%	54
Yorkshire	9.9%	101	7.5%	39	12.3%	62	5.5%	18	6.3%	22	18.2%	61	8.2%	42	11.6%	59
Wales & South West	11.3%	115	14.0%	72	8.5%	43	12.3%	41	13.0%	46	8.5%	28	11.4%	58	11.1%	57
Midlands	15.9%	163	20.5%	106	11.2%	57	16.1%	54	18.0%	64	13.6%	45	16.8%	86	15.1%	77
East England	7.1%	73	7.6%	39	6.7%	34	10.2%	34	6.4%	23	4.8%	16	5.2%	27	9.1%	46
London	17.4%	178	14.0%	72	20.9%	106	17.2%	58	19.2%	68	15.8%	53	19.6%	100	15.3%	78
Southern	9.5%	97	10.1%	52	8.9%	45	12.7%	43	9.2%	33	6.6%	22	9.2%	47	9.7%	50
Weighted base:		1022		517		505		334		355		333		510		512
Sample:		1022		499		523		98		431		493		560		462