FREE AUDIENCES: WHO ARE THEY REALLY?

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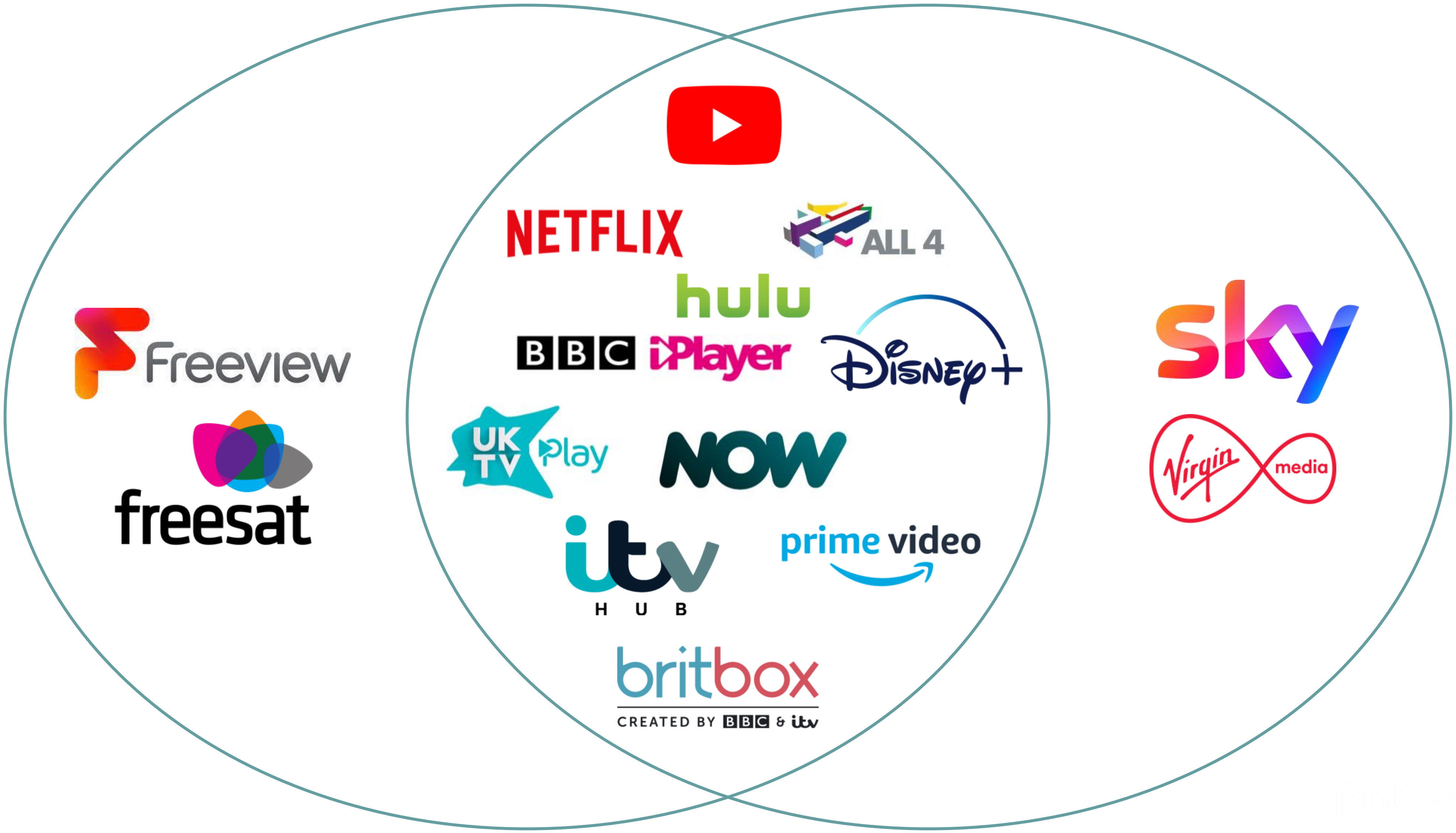
A UKTV and InSites Consulting project

Free audiences have access to more content than ever before



PHASE ONE: SEGMENTING OUR AUDIENCES

Comprehensive online survey of TV viewing behaviours and attitudes covering four main sections

CURRENT USAGE & IN-HOME SET UP	ATTITUDES TO TV & VIDEO CONTENT	VIEWS ON FREE & PAY TV	OTHER MEDIA BEHAVIOURS

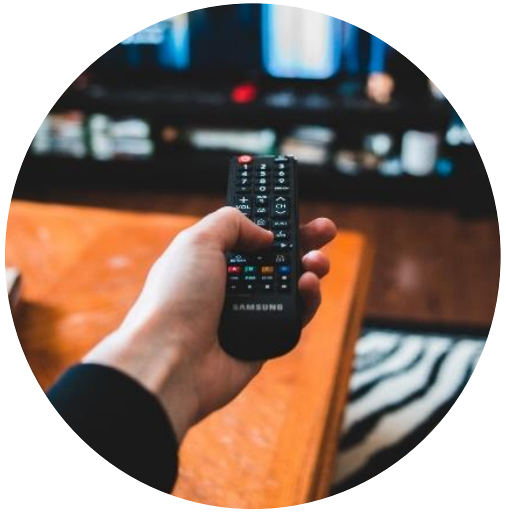
PHASE ONE: SEGMENTING OUR AUDIENCES

Three key axes drove distinct differences within the Free audience

1. LIFESTAGE

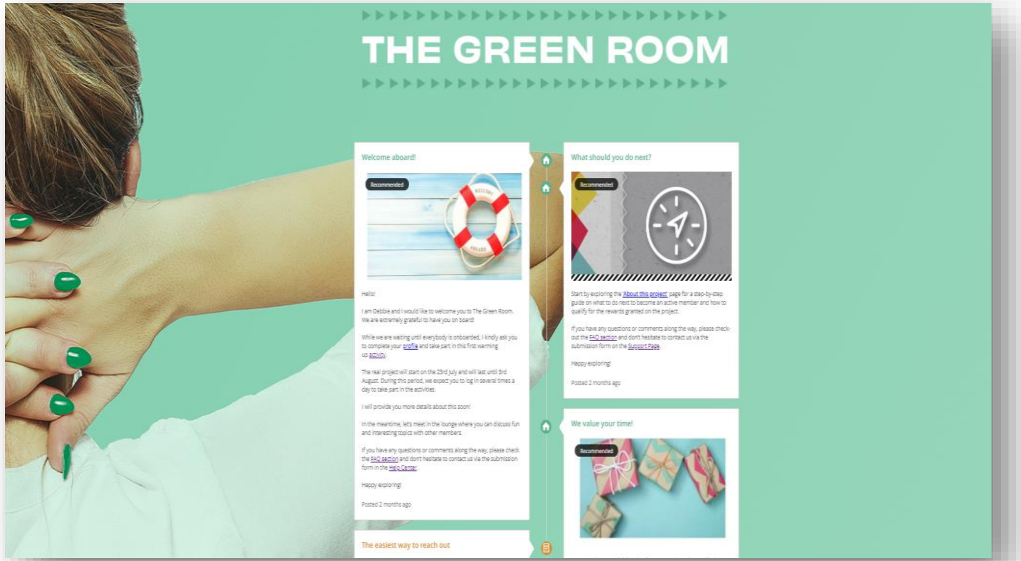
2. BEHAVIOURAL

3. ATTITUDINAL



PHASE TWO: ONLINE QUAL

10-day online community and 6 focus groups enabled us to delve deeper

ONLINE COMMUNITY	ONLINE FOCUS GROUPS
	

INTRODUCING YOUR FREE AUDIENCE SEGMENTS

Segment summary and key characteristics

Discerning Millennials

Uses lots of SVOD and BVOD services

Strong desire for new content

Low rating of Freeview content

High rating of SVOD services

Always On Families

Consume the most TV

Wide repertoire of services

No strong loyalty/aversion to Freeview

Happy to 'graze' TV and watch repeats too

Golden Traditionalists

No SVOD use at all

Some BVOD and online

Very enthusiastic about Freeview

Low or no opinion on SVOD due to lack of familiarity

Comfortable Explorers

Moderate to heavy TV viewing

Biggest range of SVOD, BVOD usage

Rate Freeview, BVOD and SVOD highly

Disengaged Millennials

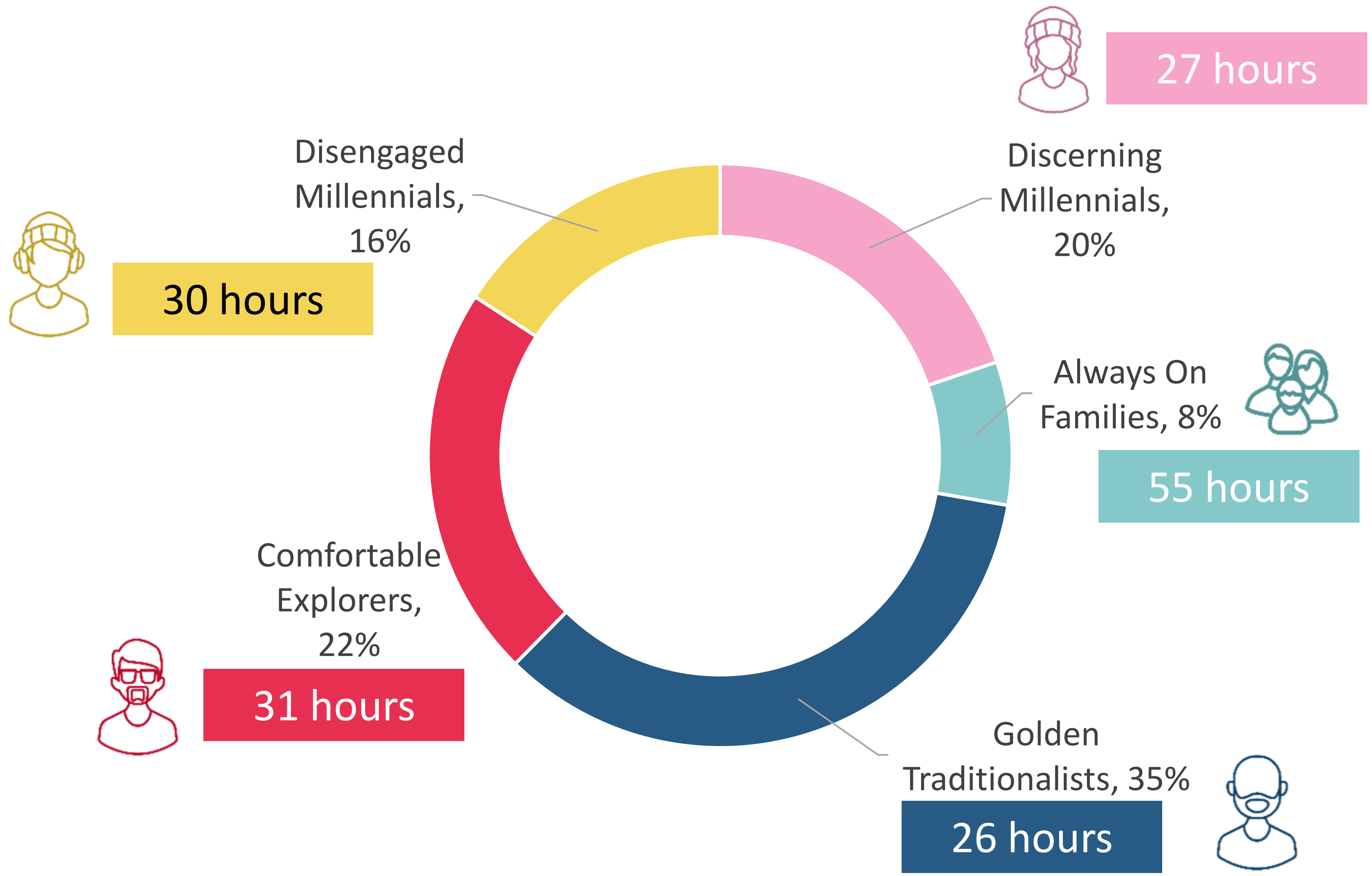
Tend to only use one SVOD service

Generally unengaged with TV

SEGMENT SIZE

Relative size of each segment as a % of total audience population

Hours in boxes = median # of hours watch TV/video a week



LIFE CYCLE OF THE SEGMENTS

Lifestage plays a strong role in these segments

COMFORTABLE EXPLORERS

Platforms

Shows

Key Characteristics

- Live TV is king
- Plan TV ahead of watching
- Friends, family, social media influence viewing
- Value nostalgic, comforting and familiar content
- Happy to watch a repeat

ALWAYS ON FAMILIES

Platforms

Freeview

Shows

James Martin's Saturday Morning

this morning

Key Characteristics

- Live TV is often first port of call
- TV viewing fits around family needs
- Looking for known favourites
- Watching to relax and de-stress
- Channel choice is secondary to content

DISCERNING MILLENNIALS

Platforms

Shows

Key Characteristics

- Strong desire for new content
- Easily transitions between platforms
- Like the flexibility of SVOD/BVOD
- Choice is influenced by those around them
- Live TV used for big events

The project identified several challenges for TV brands

1. DIGITAL START

2. IN NETFLIX WE TRUST

3. SOCIAL INFLUENCE

4. NEW CONTENT IS KING

5. BRAND SECONDARY TO CONTENT

6. LOW RISK: LOW REWARD

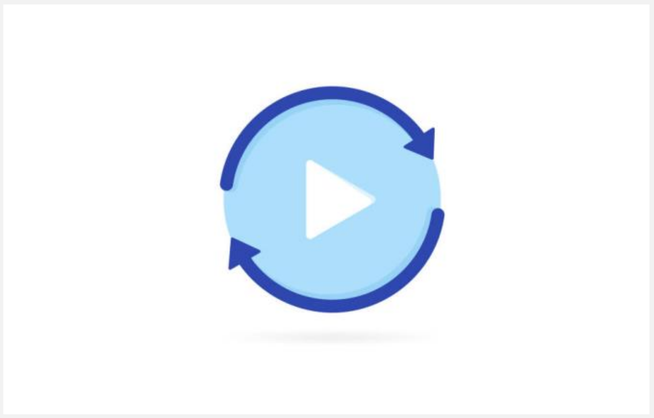
But also, clear opportunities to engage these audiences

1. COMMUNICATION IS KEY

2. TALENT TO HOOK

3. TAP INTO DISTINCT NEED STATES

4. EASE REPEAT FRUSTRATIONS



5. THE NEED FOR NAVIGATION

6. SHOWCASE VIA SOCIAL & STREAMING

SO, FREE AUDIENCES: WHO ARE THEY REALLY?

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