Understanding GB Smartphone News Consumers

A Kantar report for Ofcom, September 2019

4 key findings

- **News consumption is a key online activity** for the average smartphone user. BBC is the main source they consume on their smartphone, though users frequently turn to Apple News, Sky News and Mail Online too

-

- BBC is serving **older, more affluent consumers** well, particularly for those seeking out information about a topic or news story via search engines and web browsers

- Younger audiences, who are more likely to get their **news from social media**, are less well served by the BBC. For them, BBC is less likely to be top of mind and less likely to be a top site visited when compared to older audiences.

- Higher **engagement with BBC News** mirrors higher engagement with **smartphone news** in general and vice versa. All the while, BBC maintains its position as the top website visited or top app recalled relative to other news brands

Our Approach

A mix of behavioural and survey data to understand smartphone news consumption

The 'What'

What are adults in Great Britain doing online when it comes to news

How:

Metered smartphone activities for 1,000 adults 16+ from 1 year of GB TGI clickstream behavioural data

The 'Who'

Who is undertaking typical news journeys

How:

News journeys merged with mobile only GB TGI Clickstream survey data. Users profiled by demographics, attitudes and media consumption

Stage 1- Journey Deep Dive

Understanding the sample composition and research methodology

Sample size:
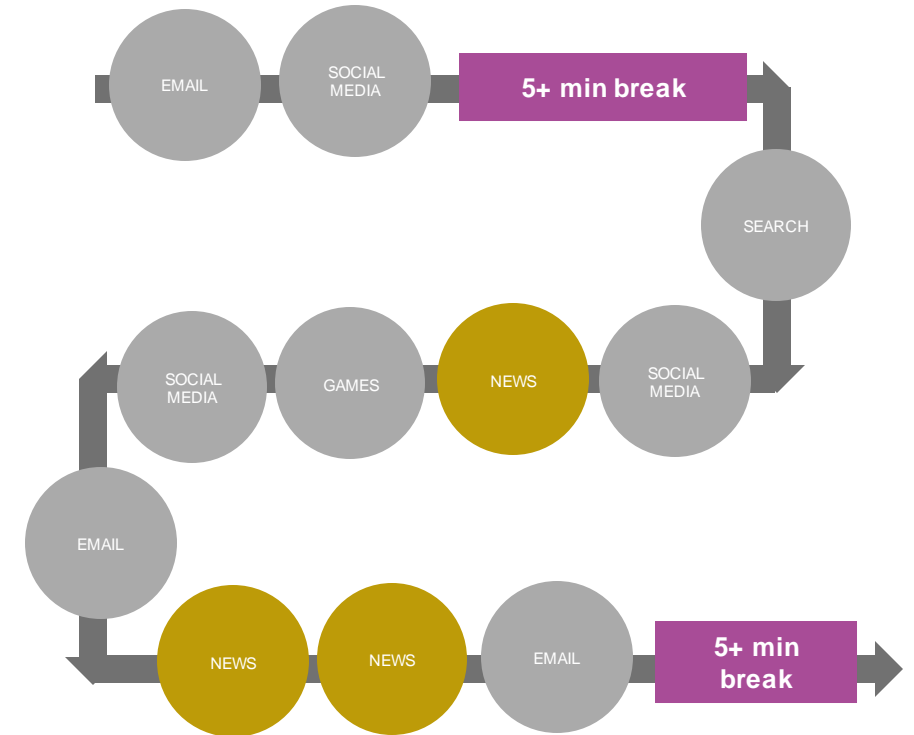879 panellists

Country:
GB

Dates:
January – December 2018

Tracking period:
Min: 2 days
Max: 26 days
Mean : 24 days

Note: We balanced the sample in order to have all users completing the same activity length, meaning all users' activity was of equal weight after this point.

	Nr. panellists	Nr. sessions
16-24	276	37
25-34	183	57
35-44	186	41
45-54	132	48
55-64	70	49
65+	32	27
Male	358	47
Female	521	42
Android	583	33
iOS	296	66

EMAIL — SOCIAL MEDIA — **5+ min break** — SEARCH
SOCIAL MEDIA — GAMES — NEWS — SOCIAL MEDIA
EMAIL
NEWS — NEWS — EMAIL — **5+ min break**

Step = Any change made by the user in their phone activity, including any clicks within the apps
Session = The whole activity of an user on their phone until a 5-min period of inactivity
Journey = The activity grouping including consisting of 2 steps before and after a news consumption

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: News Consumers (n=879)

6

News is a key category for the average user, with BBC being the main source they consume

	Average User
Number of steps in a session	**20** (mean) **/ 7** (median)
Time spent during session	**13 min** (mean) **/ 10** (median)
BBC activity per session	**1 in 2.6**

Repertoire of apps/websites visited (by number of times used)

NEWS	1. **BBC**	6. The Times
	2. Apple News	7. The Sun
	3. Daily Mail	8. Guardian
	4. Sky	9. Mirror
	5. Buzzfeed	10. Digital Spy

Repertoire of categories visited (by number of times used)

CATEGORIES	1. Web Browser	6. Search
	2. **News**	7. Rewards/Points
	3. Utilities	8. Email
	4. IM	9. Retailer
	5. Social networks	10. Video Stream

Consumers successfully engage with the BBC, integrating the channel in their broader goal-driven behaviour for information on their phone and social networks

	Apple News	BBC	Buzzfeed / Lad Bible	Daily Mail
Number of steps in a session	7	8	12	12
Time spent on a journey	2.1 min	3.5 min	2.4 min	3.9 min
Time spent *on news during journey*	0.8 min	1.5 min	0.9 min	1.6 min

Repertoire of apps/websites visited (over-indexing)

SOCIAL NETWORKS	Instagram, YouTube	Twitter, WhatsApp, Snapchat	Facebook, Instagram, YouTube	Facebook, WhatsApp
PHONE BEHAVIOUR	Siri, Appstore, Safari	Chrome, Google Search, Wikipedia	Maps, Fitness	Messaging, Email, Contacts, Chrome, Google Search, Wikipedia
APP	Instagram	Twitter	Instagram	WhatsApp
WEB	Buzzfeed	Wikipedia	Facebook	Google

KANTAR

Step = Any change made by the user in their phone activity, including any clicks within the apps
Session = The whole activity of an user on their phone until a 5-min period of inactivity
Journey = The activity grouping including consisting of 2 steps before and after a news consumption

8

Each subgroup behaves differently when it comes to news consumption

AGE

16-24 & 25-34:
- Communicate directly through apps and often get news in an alternative format through social media
- Prefer alternative news sources *(e.g. Buzzfeed)*
- More likely to use news apps and aggregators

35-44 & 45-54:
- Many rely heavily on BBC app & web
- Use their phone for communication and key social platforms
- Engage with a variety of news sources through social media

55-64 & 65+:
- Engage with singular news sources that trigger attention *(e.g. Daily Mail, The Sun)*
- Use less social media and more email
- Might come across BBC through web

GENDER

Male:
- More likely to exhibit info-led behaviour to search for information or browse the web
- Many use BBC app & web as a singular trusted source of info and further their exploration on Wikipedia
- More likely to prefer dynamic visual formats *(e.g. Snapchat, YouTube)* and microblogging *(e.g. Twitter)*

Female:
- Heavy users of messaging and social media browsing
- Have a vast repertoire of news sources, traditional and alternative publications that they consume mostly on web
- Many have a preference for static visual formats through social media *(e.g. Facebook, Instagram)*

SOCIAL MEDIA & NEWS USAGE

Social Media:
- Consume news in short, sharp bursts of activity
- Limited mobile behaviour *(e.g. Search, Email)*
- Read fewer news sources, especially easily-shareable content through the web

No Social Media:
- Average news activity through alternative and traditional news sources and aggregators
- Dedicated to BBC on both app & web

News App:
- Versatile behaviour switching between social media and news apps
- Use a few trusted providers (e.g. BBC) and diversify their sources through aggregators

Web News:
- Use web-based social media to communicate and consume news
- Rely on search to look directly for web news

Overall, age is the biggest differentiator to identify the key target groups

| 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |

16-24'S DIFFERENT BEHAVIOUR

Older users communicate through their phone whilst, younger users use social media for that.

Platforms have different uses:
- YouTube for entertainment
- Instagram for blogging
- Facebook/ Twitter for news consumption.

The desire to use multiple platforms to meet different needs is also translated to news. Younger groups rely on more news sources that they can get through or consume directly on social media, news aggregators or news publication apps.

GENDER-DRIVEN CONSUMPTION

Age is not such a big differentiator for 25+, but gender is:
- Men have stronger info-led behaviour, while women are more social.
- Men are more likely to read BBC through the app, getting their insights from there and continuing their exploration by browsing the web.
- By contrast, women are heavier social media users, consuming a bigger repertoire of web-based news sources.

SOCIAL VS. APP USAGE

Social media and app usage are key journey steps. Journeys that include social media are more similar to non-app news usage ones. Users consume multiple news sources through the web, likely due redirects from social media.

Journeys lacking a social media step are more in line with news-app ones. These users, similarly to men, rely on a few trusted news app providers such as BBC or news aggregators. They also have a more versatile phone behavior, using voice controls, messaging or downloading apps.

KANTAR

Journey Creation – from tracked session data to the most typical journeys

2. We created 5-step journeys with news consumption as the middle-step. Any sessions ending or starting with news led to 3-step journeys.
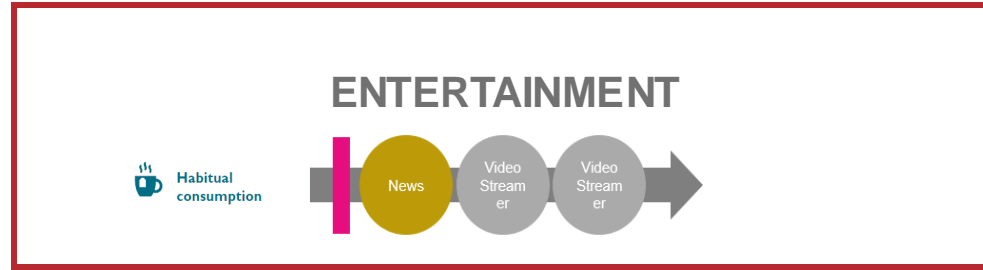
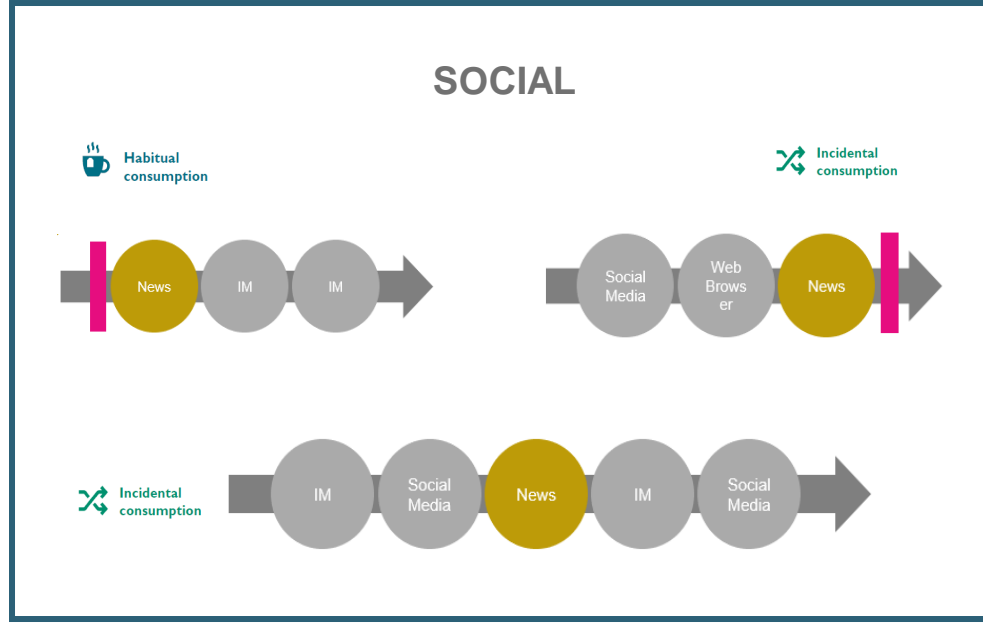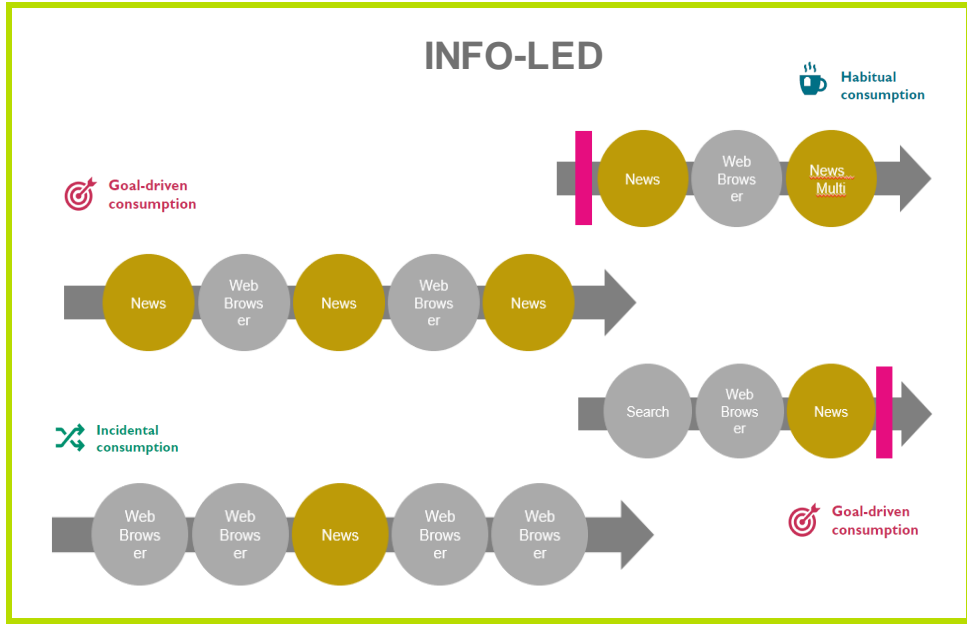Session example

1. We merged any grouping of several news steps in a session in order to capture the 2 steps before and after that news consumption instance. This was then unpacked for the analysis.

EMAIL · SOCIAL MEDIA · NEWS · NEWS · SEARCH · SOCIAL MEDIA · NEWS · GAMES · SOCIAL MEDIA

NEWS_MULTI

1st journey

2nd journey

3. Using these clear building blocks helped key categories emerge as the most frequently associated with news consumption.

2nd journey

Most visited domains
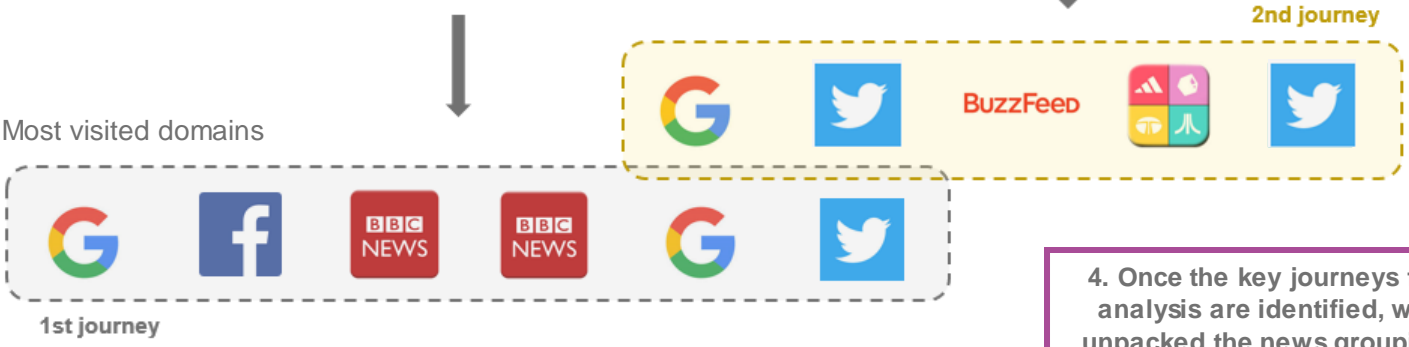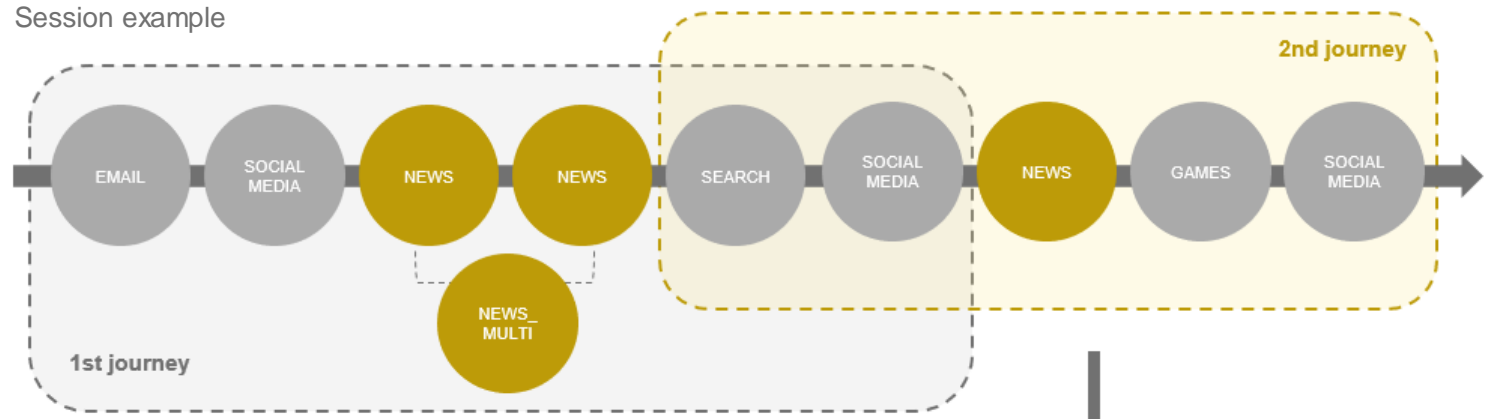
5. We chose the most frequent journeys split by domains that fall under the category patterns.

1st journey

4. Once the key journeys for analysis are identified, we unpacked the news grouping and looked at the different journeys by domains that fall under that pattern.

KANTAR

Selected journeys for analysis

INFO-LED

Goal-driven consumption

Incidental consumption

Habitual consumption

News — Web Browser — News Multi

News — Web Browser — News — Web Browser — News

Search — Web Browser — News

Web Browser — Web Browser — News — Web Browser — Web Browser

Goal-driven consumption

SOCIAL

Habitual consumption

Incidental consumption

News — IM — IM

Social Media — Web Browser — News

IM — Social Media — News — IM — Social Media

FUNCTIONAL

Habitual consumption

News — Location services — News

ENTERTAINMENT

Habitual consumption

News — Video Streamer — Video Streamer

Info-Led: user appeared to seek out information about a topic or news story via search engines and web browsers

Social: usually incidental and involved interaction with social media or messaging services around the news consumption

Functional: included steps in the journey such as location services

Entertainment: included steps in the journey such as video streaming
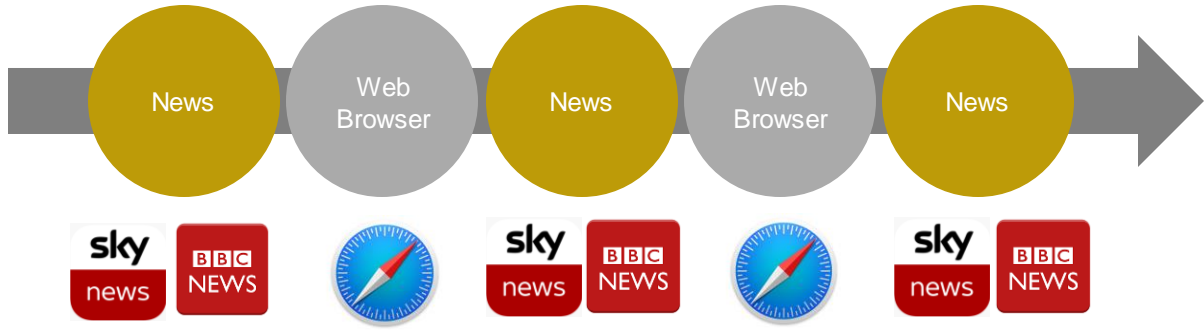
KANTAR

Four journeys fall into the Info-Led category
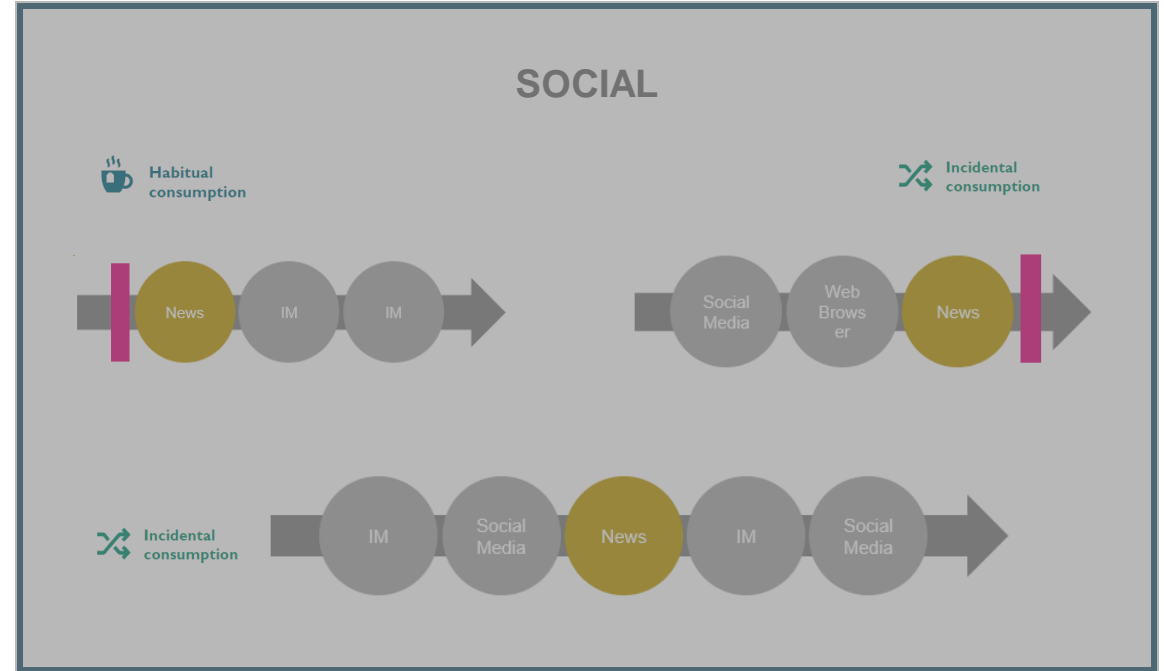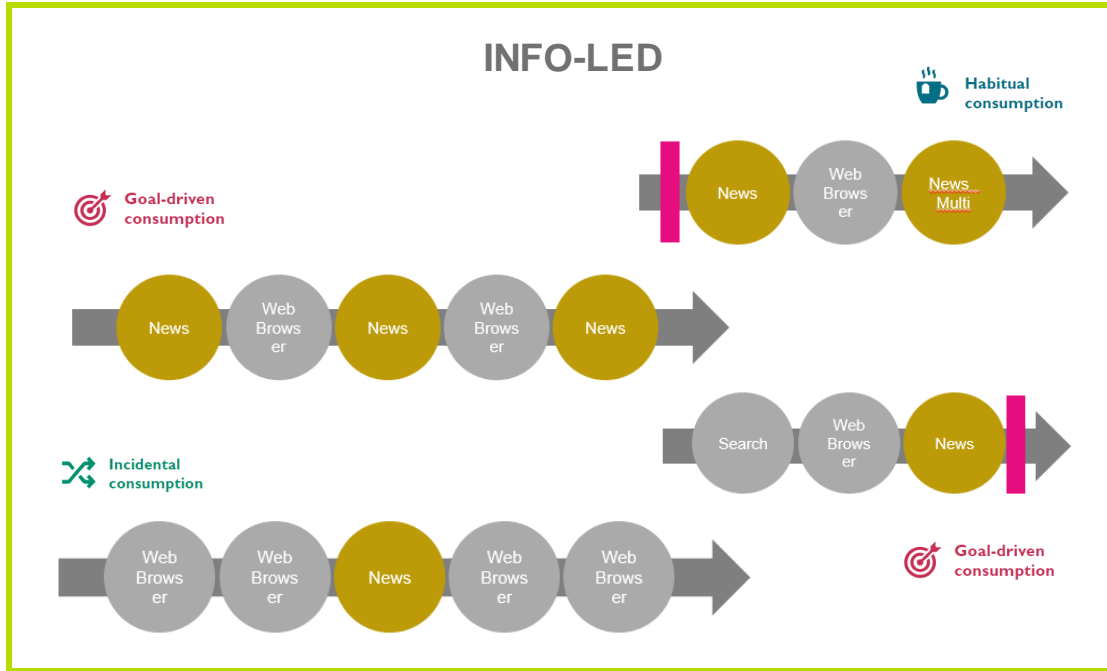
INFO-LED | Web browser, News Dominant

WHAT

Frequency	Users
1389	80

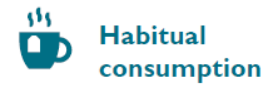News → Web Browser → News → Web Browser → News

Part of a longer session in the morning and at night, the journey suggests a routine. Although having a broad repertoire of news sources, the user sticks to one news publication most often through the app. They may use the web browser to engage further with the articles on the news app by clicking on external sources referenced there that open up in the web browser.

Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
37	19 min	2.3 min	10	1.1 min	**Average**

WHO

Subgroup Analysis

↑	Session start: Messaging & Email
↓	Format: Web News
↓	Channel: Apple News
↑	Timestamp: Morning & Night

Habitual consumption

Pen Portrait.

Female

45-54

ABC1

↑↓ = Over/Under Index from the average news consumption journey

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)

Base: Info-Led: Web Browser, News Dominant users (n=80)

INFO-LED | Web browser, Web Browser Dominant

WHAT

Frequency	Users
761	145

WHO

Web Browser — Web Browser — News — Web Browser — Web Browser
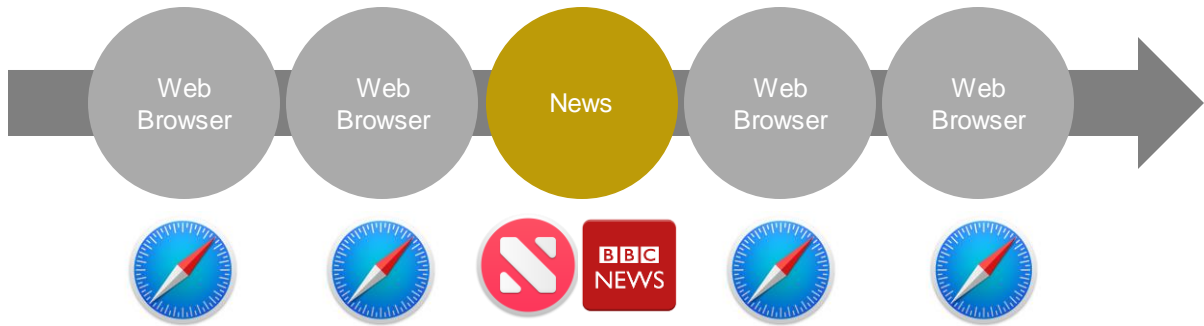
Lower engagement with news suggests this is an incidental or goal-driven news consumption as a result of a piece of information seen online. The user is most likely browsing while going about their night routine. They use both app and web formats, news being a key step with BBC and Apple News being used most frequently.

Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
39	9 min	2.6 min	10	0.5 min	**Low**

Subgroup Analysis

⬆ Session start: Search

⬆⬇ Format: News App/ Web

⬆ Channel: Apple News

⬆ Timestamp: Night

🎯 **Goal-driven consumption**   🔀 **Incidental consumption**
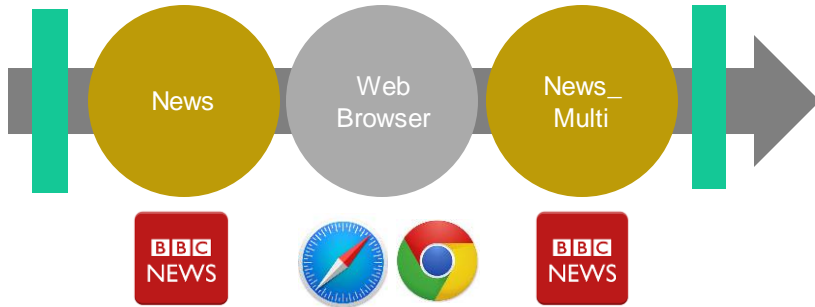
Pen Portrait.

Female

35-44

C2DE

KANTAR

⬆⬇ = Over/Under Index from the average new s consumption journey

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)

Base: Info-Led: Web Brow ser, Web Browser Dominant users (n= 145)

INFO-LED | News grouping

WHAT

Frequency	Users
100	50

WHO

News — Web Browser — News_Multi

BBC NEWS · Safari · Chrome · BBC NEWS

The journey is dedicated to news, with the user focusing on a few trusted sources they engage with heavily - such as the BBC - to either find specific information or explore as part of a routine. They may react to a notification or come across a topic through the other session steps, which could lead them to the news app to read about that piece of news more in depth.

Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
16	12.8 min	4.2 min	5	2.9 min	**High**

Subgroup Analysis

⬆ Session start: Email & News

⬇ Format: Web News

⬆ Channel: BBC

⬆⬇ Timestamp: All Day

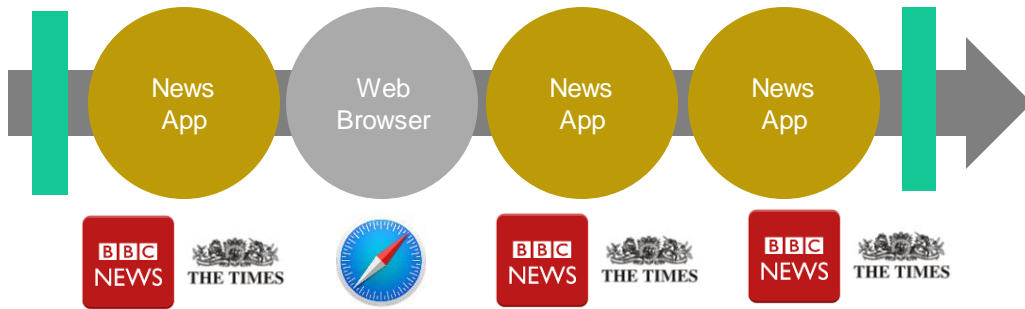☕ **Habitual consumption**

🎯 **Goal-driven consumption**

Pen Portrait.

GENIUS

Male

45-54 & 55-64

ABC1

⬆⬇ = Over/Under Index from the average news consumption journey

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)

Base: Info-Led: News Grouping users (n=50)

KANTAR

16

INFO-LED | News app

WHAT

Frequency	Users
41	26

The journey is more likely to start with the news step. Its duration almost entirely dedicated to news consumption suggests a routine. The user may rely on this short time to read through recent news from dedicated sources through the app rather than news aggregators. They are likely waiting for something interesting to catch their attention.
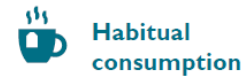
Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
21	11.5 min	2.9 min	2	2.3 min	**High**

WHO

Subgroup Analysis
↑ Session start: News
↑ Format: News App
↓ Channel: Apple News
↑ Timestamp: Afternoon & Night

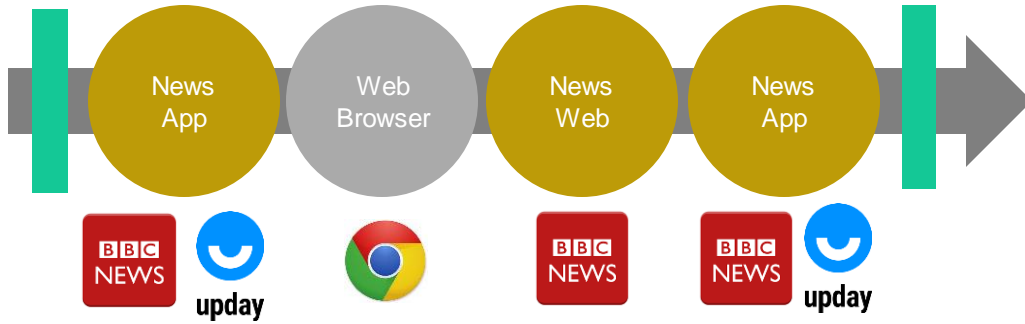☕ Habitual consumption

Pen Portrait.

Male

55-64

ABC1

↑↓ = Over/Under Index from the average news consumption journey

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)

Base: Info Led: News App users (n=26)

KANTAR

17

INFO-LED | News web

WHAT

Frequency	Users
23	11

WHO

News App — BBC NEWS, upday

Web Browser — Chrome

News Web — BBC NEWS

News App — BBC NEWS, upday

The user, although more likely to use BBC regardless of format, is also going on news aggregators. They could be consulting the news as part of an evening routine, either starting on news or arriving there through the session. They seem to engage more with external sources referenced in articles or may be browsing for something as a result of what they read.
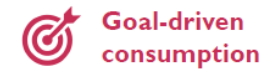
Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
11	13.3 min	4.2 min	2	2.7 min	High

Subgroup Analysis

⬆	Session start: Email & News
⬆⬇	Format: App/ Web News
⬆	Channel: BBC
⬆	Timestamp: Evening

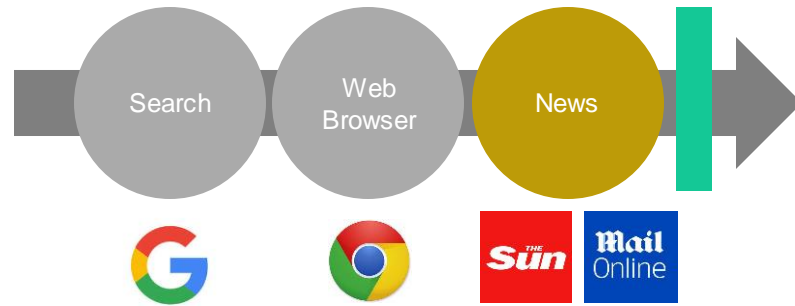Goal-driven consumption

Pen Portrait.

Male

45-54

ABC1

⬆⬇ = Over/Under Index from the average news consumption journey

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)

Info-Led: News Web users (n=11)
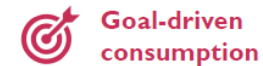
KANTAR

INFO-LED | Search

WHAT

Frequency	Users
200	79

Search — Web Browser — News

The short time spent on news as the last step suggests the end of a goal-driven consumption. The user is likely to have been exposed to a piece of information either through their session steps or other media they interact with as part of their morning routine (i.e. radio or TV). The may have been searching for something specific and once they open up the web article that they find relevant, they only read it briefly.

Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
11	5.2 min	3.3 min	4	0.5 min	Low

WHO

Subgroup Analysis

⬆ Session start: Email & Search

⬆ Format: Web News

⬆ Channel: Daily Mail

⬆ Timestamp: Morning

🎯 Goal-driven consumption

Pen Portrait.

Male

65+

C2DE

⬆⬇ = Over/Under Index from the average new s consumption journey

Social journeys are generally incidental or part of a routine

SOCIAL | Instant Messaging

WHAT

Frequency	Users
230	80
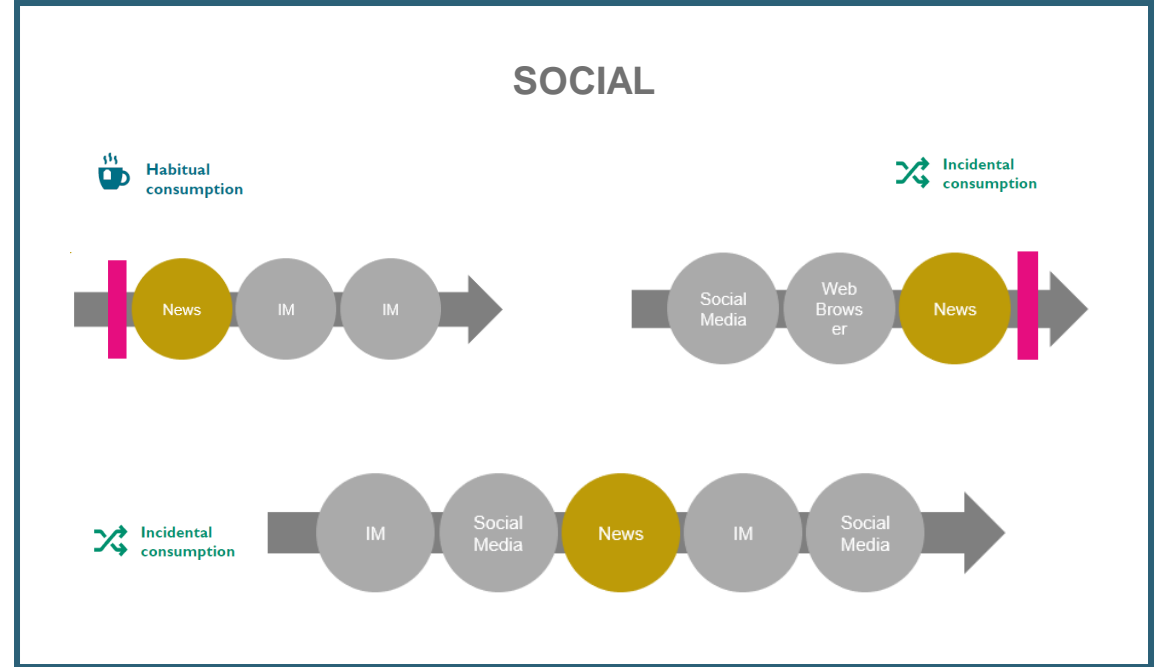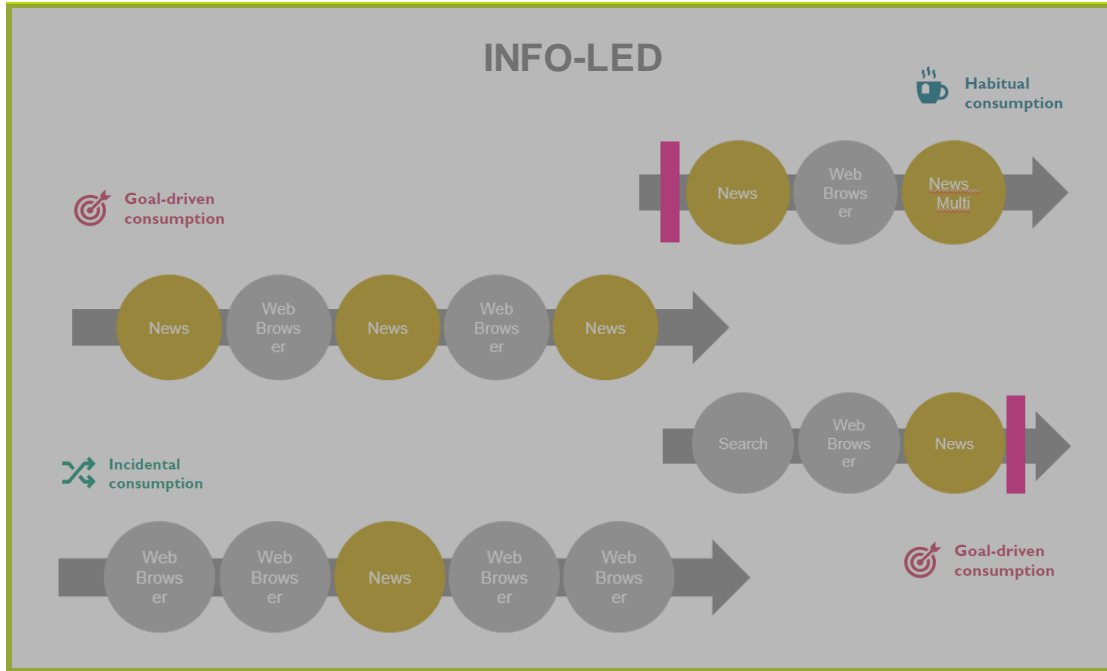
News → Instant Mess. → Instant Mess.
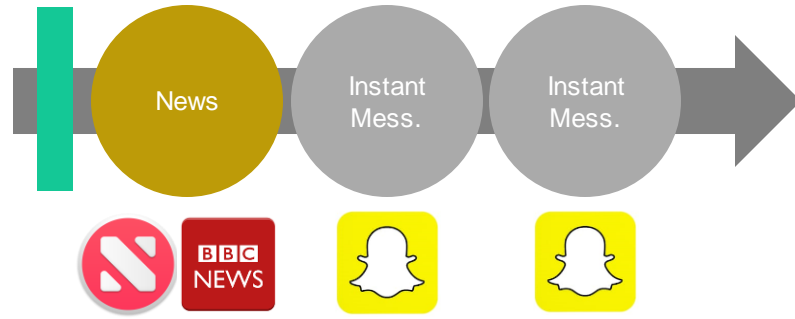
Users start their session on news, engaging with this step briefly before switching to messaging. Low engagement with this first step suggests a spontaneous news consumption. Receiving a notification from a dedicated or aggregator news app, the user may open the app and then moves onto a platform like Snapchat. BBC and Apple News may act as triggers for this type of journey, suggesting the user is in the habit of paying attention to these news sources.

Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
11	3.4 min	1.7 min	4	0.6 min	**Low**

WHO

Subgroup Analysis

⬆	Session start: News
⬇	Format: Web News
⬆	Channel: BBC & Buzzfeed
⬆	Timestamp: Afternoon

Incidental consumption

Pen Portrait.

Male

16-24

ABC1

⬆⬇ = Over/Under Index from the average news consumption journey

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)

Base: Social: Instant Messaging users (n=80)
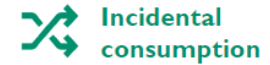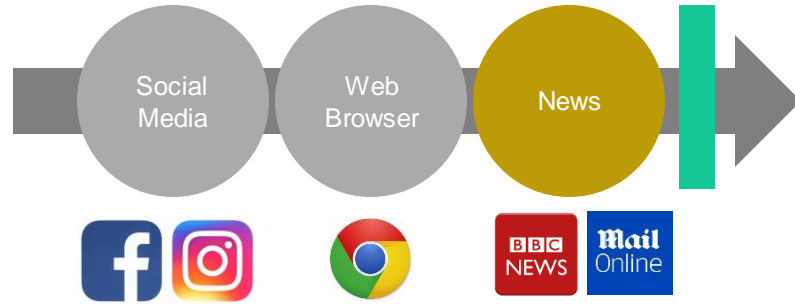
21

SOCIAL | Social Media

WHAT

Frequency	Users
156	68

Social Media → Web Browser → News

Users are coming across news through social media. They spend less time and consult fewer news sources, suggesting this journey might be part of a morning routine where they are incidentally consuming news. They prefer web formats and may search directly in the browser for something they saw on social media. BBC and Daily Mail are the key sources for different types of information required.

Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
10	4.5 min	3.3 min	3	0.5 min	**Low**

WHO

Subgroup Analysis

↓ Session start: News

↑ Format: Web News

↑ Channel: BBC

↑ Timestamp: Morning

⤬ Incidental consumption   ◎ Goal-driven consumption

Pen Portrait.

Female

25-34

ABC1

↑↓ = Over/Under Index from the average news consumption journey

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)

Base: Social: Social Media users (n=68)
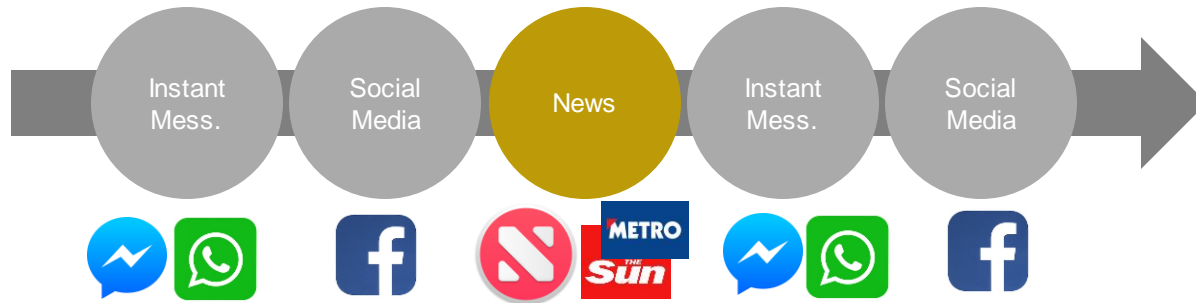
KANTAR

22

SOCIAL | Instant Messaging & Social Media

WHAT

Frequency	Users
64	23

WHO

Instant Mess. — Social Media — **News** — Instant Mess. — Social Media

The session is more likely to start through messaging or social media, with news coming up as a spontaneous step. Apple News is the main news app used, possibly as a result of a notification or to scan through headlines, while a collection of web news sources is accessed directly from social media for a longer read.

Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
48	13 min	4.8 min	1*	1.1 min	**Average**

Subgroup Analysis

⬆ Session start: Messaging & Social Media

⬆⬇ Format: App/ Web News

⬆ Channel: Daily Mail

⬆ Timestamp: Morning

⤫ **Incidental consumption**

Pen Portrait.

Female

25-34

ABC1 & C2DE

*Apple New s is the main new s source for this step with a solid frequency. How ever, several web new s sources add up in term of frequency to form a collection of w eb new s that the users might come across through social media.

⬆⬇ = Over/Under Index from the average new s consumption journey

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)

Base: Social: Instant Messaging and Social Media users (n= 23)
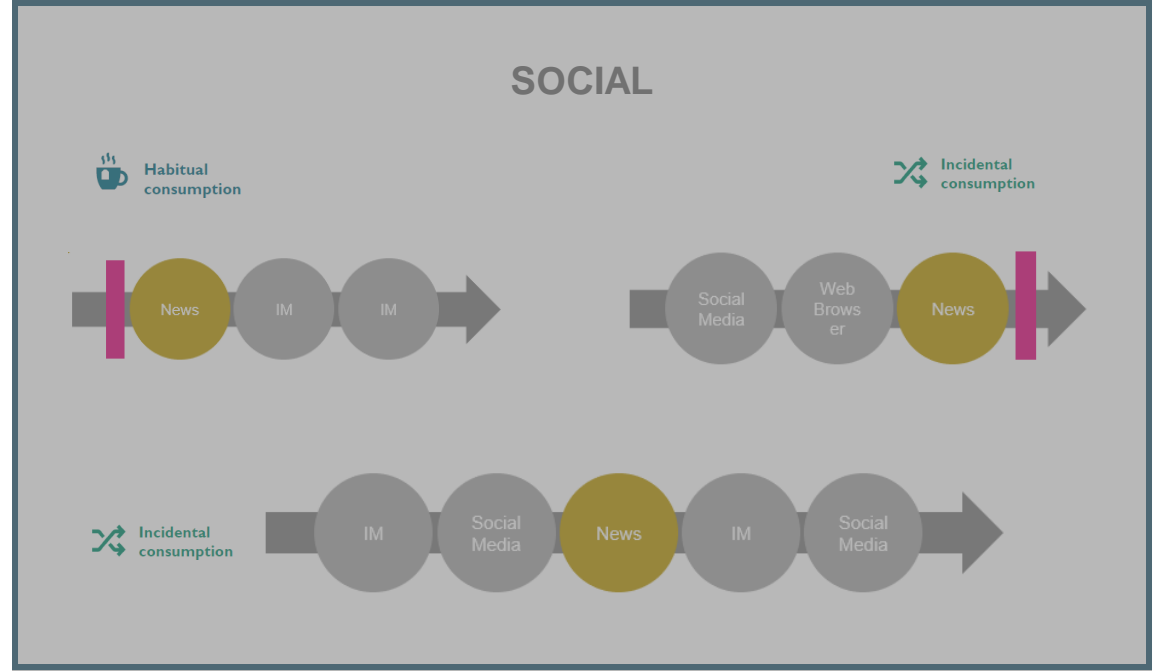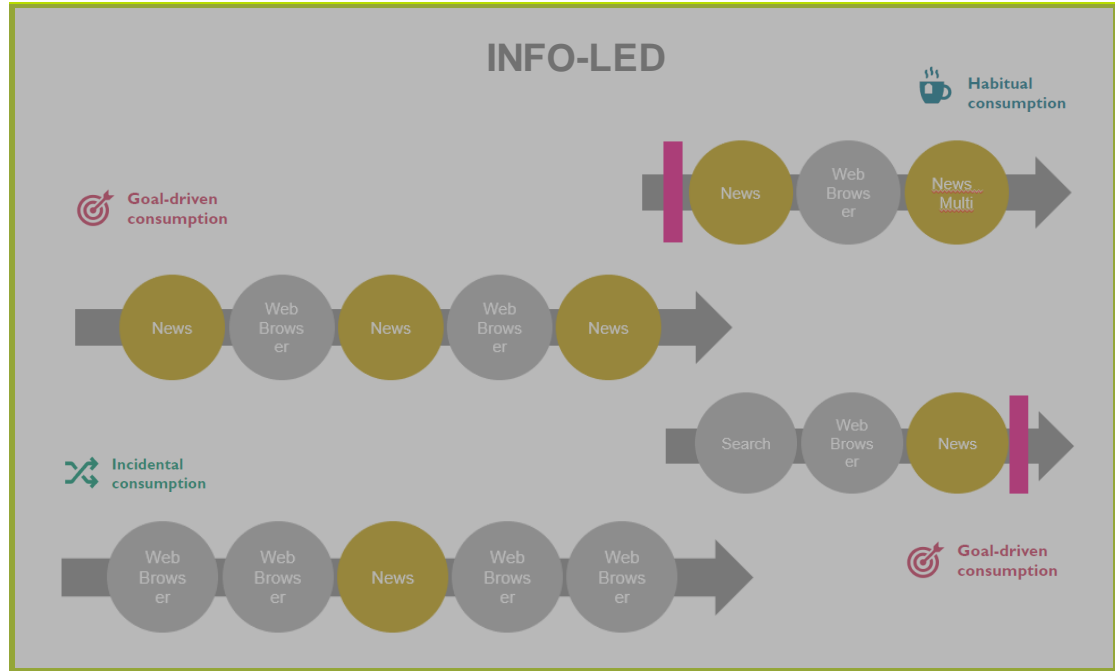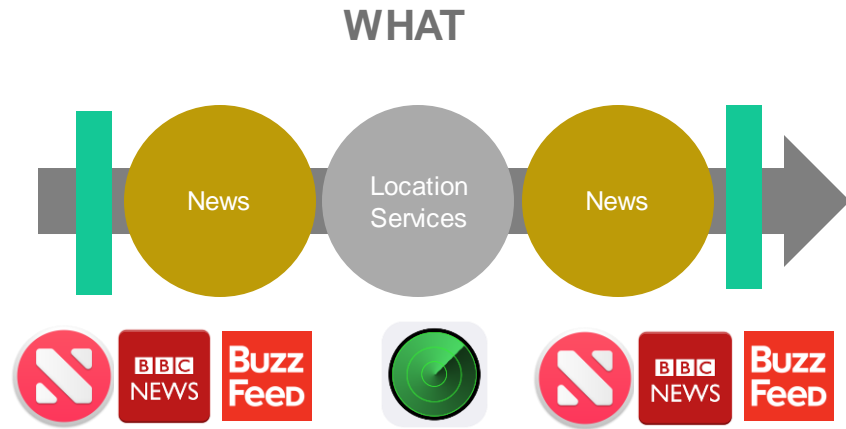
Functional journeys include steps such as location services whilst Entertainment journeys typically involve steps like video streaming
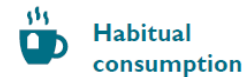
INFO-LED

Habitual consumption

Goal-driven consumption

| News | Web Browser | News Multi |

| News | Web Browser | News | Web Browser | News |

Incidental consumption

| Search | Web Browser | News |

| Web Browser | Web Browser | News | Web Browser | Web Browser |

Goal-driven consumption

SOCIAL

Habitual consumption

Incidental consumption

| News | IM | IM |

| Social Media | Web Browser | News |

Incidental consumption

| IM | Social Media | News | IM | Social Media |

FUNCTIONAL

Habitual consumption

| News | Location services | News |

ENTERTAINMENT

Habitual consumption

| News | Video Streamer | Video Streamer |

KANTAR

FUNCTIONAL | Location services

WHAT

Frequency	Users
176	35

News — Location Services — News

Starting or ending with news and less likely to be driven by search, this journey is an example of a habitual consumption around beginning and end of day. It is often linked to a larger family behaviour of checking various types of news as part of a routine, with Find my iPhone or Find my Friends being used briefly at key stages. News is consumed through the app and sources differ based on age.

Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
15	6.5 min	1.4 min	5	1.1 min	**Average**

WHO

Subgroup Analysis

⬇ Session start: Search

⬆ Format: News App

⬆ Channel: Apple News & Buzzfeed

⬆ Timestamp: Morning & Evening

☕ Habitual consumption

Pen Portrait.

Female & Male

16-24 & 45-54

ABC1

= Over/Under Index from the average news consumption journey

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)

Base: Functional: Location Services users (n=35)

ENTERTAINMENT | Video streaming

| Frequency	Users
45	28

WHAT

News | Video Stream. | Video Stream.

News is working as a trigger for video streaming. Mainly on Apple News or the BBC App, users are briefly engaging with news, possibly to get a quick update or perhaps finding something interesting to read. They then switch for the larger part of the journey to video content, possibly continuing from something they read or looking for new easier-to-digest content. This can suggest both spontaneous and habitual news consumption.

Session Steps	Session Length	Journey Length	News sources	News time / journey	Engagement
17	3.6 min	2.7 min	2	0.6 min	**Low**

WHO

Subgroup Analysis

⬆ Session start: News

⬇ Format: Web News

⬆ Channel: Apple News

⬆ Timestamp: Evening & Night

☕ **Habitual consumption**   ⤬ **Incidental consumption**

Pen Portrait.

Male

16-24

C2DE

⬆⬇ = Over/Under Index from the average news consumption journey

KANTAR

Overall, BBC is strongly positioned for info-led consumption among older demographics, but needs a better integration in the social journeys especially among younger audiences
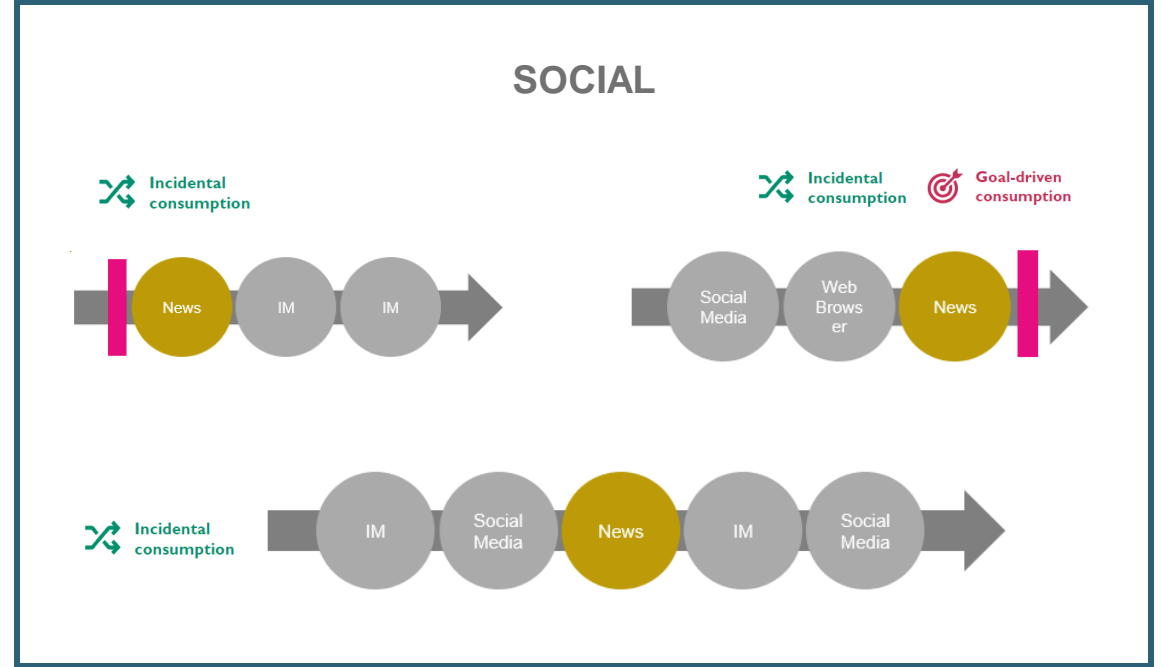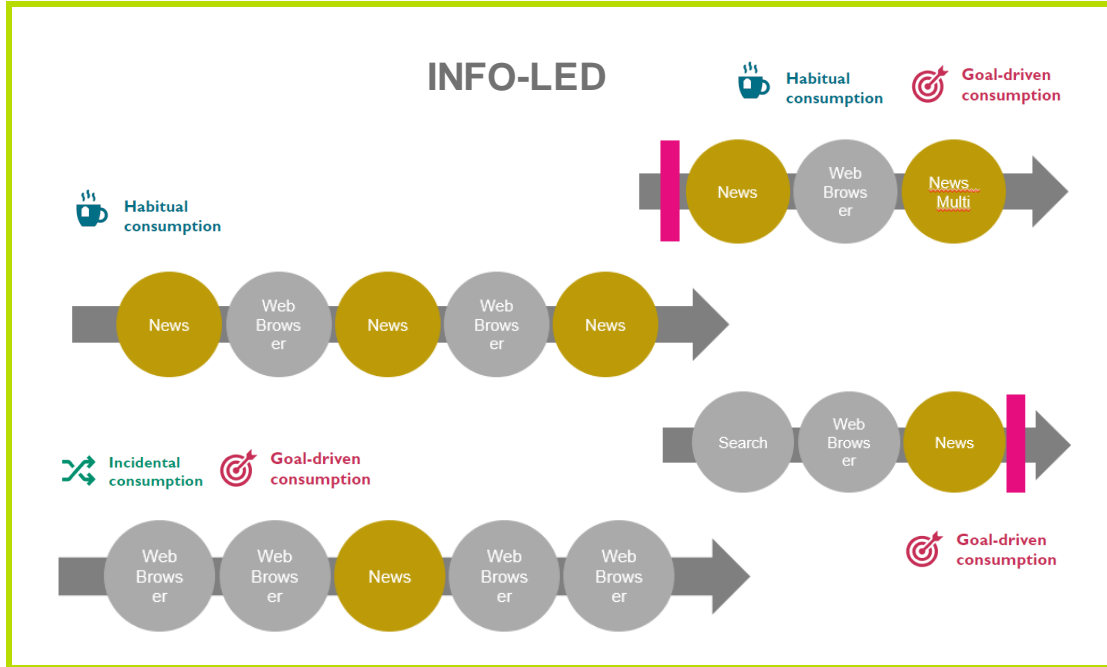
- BBC is used as a main source of info particularly across goal-driven and habitual behaviours
- Engagement around BBC is average to high, with people using it as a source of trusted and valid information
- Caters to both web and app format preferences, consulted at various moments throughout the day

- Good use of notifications through the app and presence on news aggregators works well within social journeys
- Increased presence on social media platforms can help BBC challenge other publications
- Adapting to youth-friendly design in line with news aggregators and catchy video formats can be a UX benefit

Stage 2- Profiling the Journey Types

How to read the TGI figures

Target B

I value the local paper because it covers local news	23%	**58**
I often find out about breaking news & events through social networking sites first	44%	**126**

3 Index:

An index of **58** means segment B is 42% (100 – 58) less likely than GB smartphone users aged 16+ to agree *"I value the local paper because it covers local news"*

With an index below 80, the finding is statistically below the average and marked in **red**

1 Profile %:

44% of segment B agree that *"I often find out about breaking news & events through social networking sites first"*

2 The corresponding index to the 44% is 126.

This means that segment B is **26% (126 -100)** more likely than GB smartphone users aged 16+ to agree that *"I often find out about breaking news & events through social networking sites first"*

With an index above 120, the finding is statistically above the average and marked in **green**

This increased propensity to turn first to social networking sites for breaking news is a typical trait that helps characterise the segment versus the population

4 The footnote always mentions the source of the data, the base of the %, the definition of the benchmark and their sample sizes. In case of multiple sources on a single chart, each source will be quoted next to the findings

How to read the figures

KANTAR

Source: GB TGI Clickstream 2019 Q2 (Smartphone only), Benchmark: GB smartphone users aged 16+

# Selection of the figures in the deck

Rules

In order to characterise the key target groups versus the benchmark of reference:

- We have displayed variables that combine a **high index** and a high profile percentage.

- For variables that are not significantly high, we have displayed variables with a **low index** as it still tells us something specific about the segment.

- For certain variables, the target's profile might not be particularly different from the average (neither high nor low). When it is the case, we have reported characteristics that represent the majority of people in the target and used the grey font. For instance most people in a target might be married, however this is no different from the average population.

KANTAR
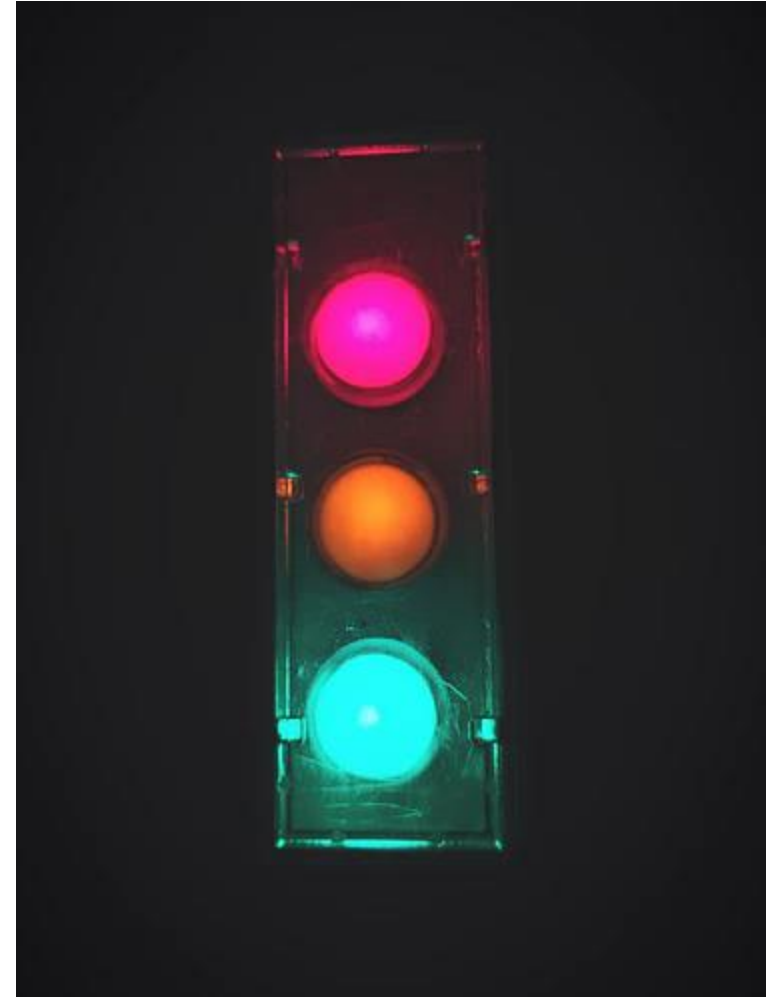
Smartphone news and the BBC
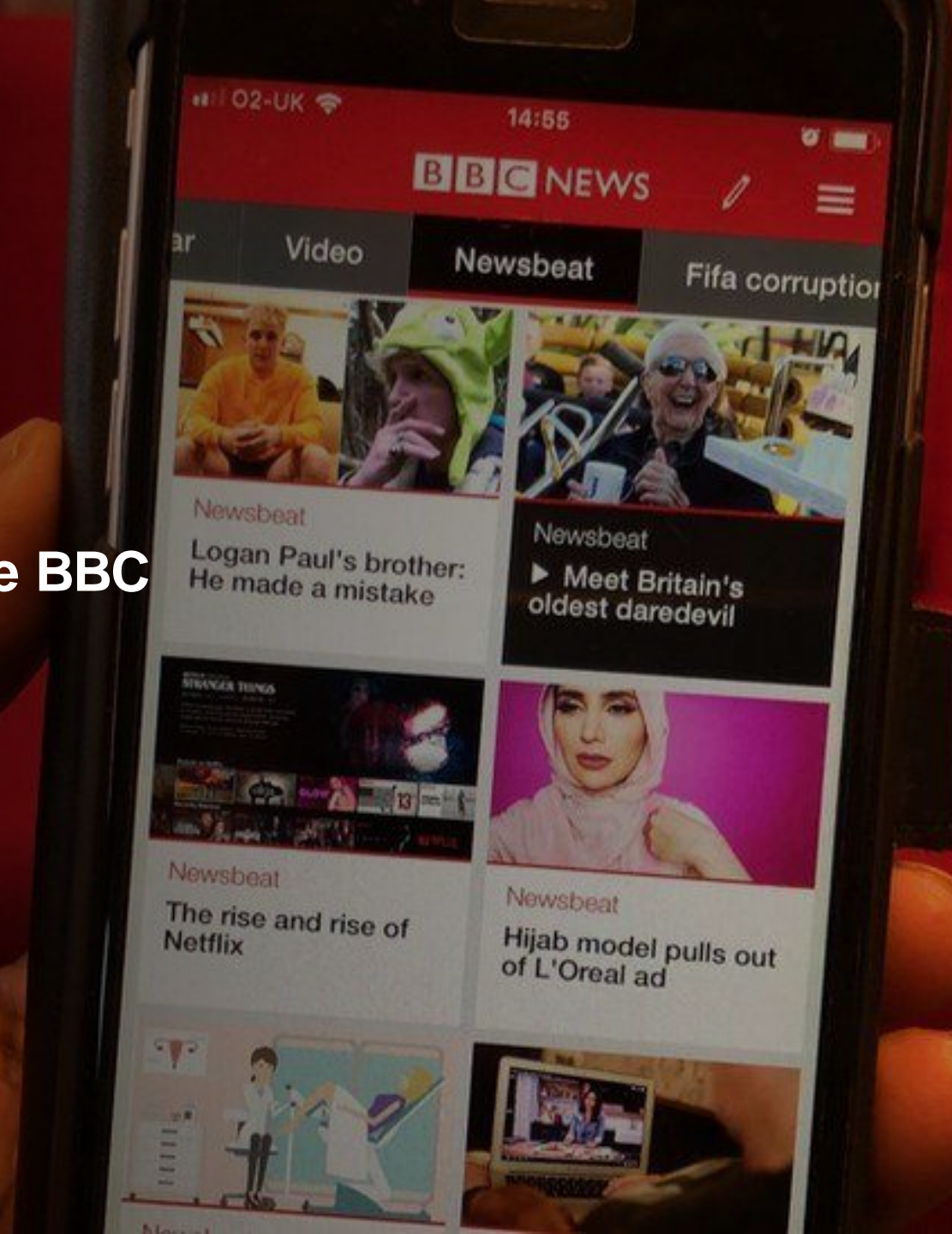
The sample composition and research methodology of stage 2

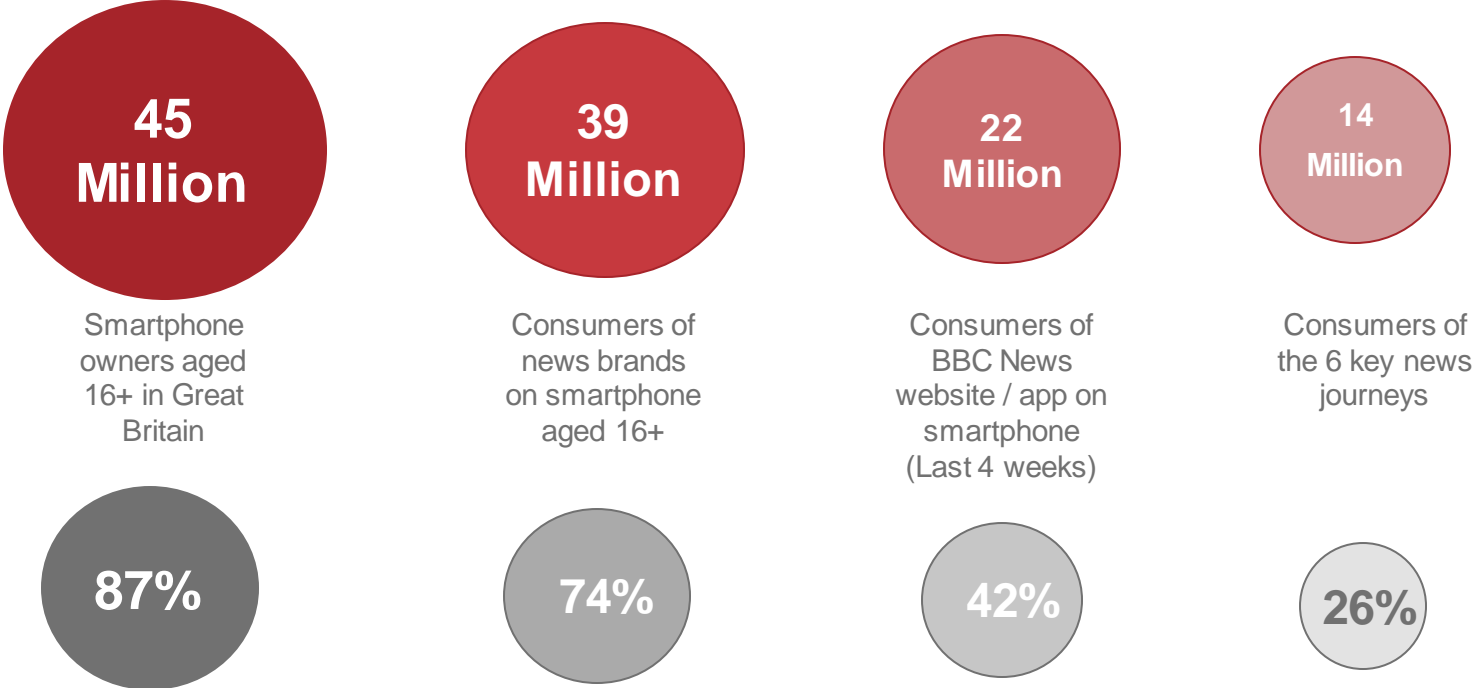**Sample size:**
1,016 respondents

Country:
GB

Dates:
January – December 2018

- The news journeys identified in stage 1 were appended to the GB TGI Clickstream and a smartphone users only version of the database was created.

- Data was weighted to levels representative of the smartphone population in GB to correct any imbalance in the demographic profile of respondents.

- The database was then used to analyse typical consumers of the different news journeys identified in stage 1 in terms of their demographics, attitudes, media preferences, news consumption and relationship to the BBC.

- To profile news consumers, the characteristics reported on each of the news consumers profiles were selected based on high indexing and high penetrating data points to best discriminate one profile from the other.

Note: a person could have more than one type of digital news journey, as news consumption could vary by day of week, time of day, and journey purpose.

KANTAR

74% of the GB population aged 16+ years consume news on their smartphone. 42% visit the BBC News website/ app on their device.

Smartphone and News Populations

45 Million	**39 Million**	**22 Million**	**14 Million**
Smartphone owners aged 16+ in Great Britain	Consumers of news brands on smartphone aged 16+	Consumers of BBC News website / app on smartphone (Last 4 weeks)	Consumers of the 6 key news journeys
87%	**74%**	**42%**	**26%**

**% of the GB population aged 16+ years**

KANTAR

33

Smartphone news consumers

'The Who'

- A group broadly representative of the smartphone population

- Majority exhibit progressive and forward thinking views

- Majority rely on their mobiles and the internet with many actively avoiding adverts.

- Around 6 in 10 consume news and current affairs content on the internet

- Again, around 6 in 10 read newspapers (4 in 10 watch news/current affairs on TV)

- BBC news is visited most compared with other websites and new apps amongst this group

39m
86% of GB smartphone adults

KANTAR
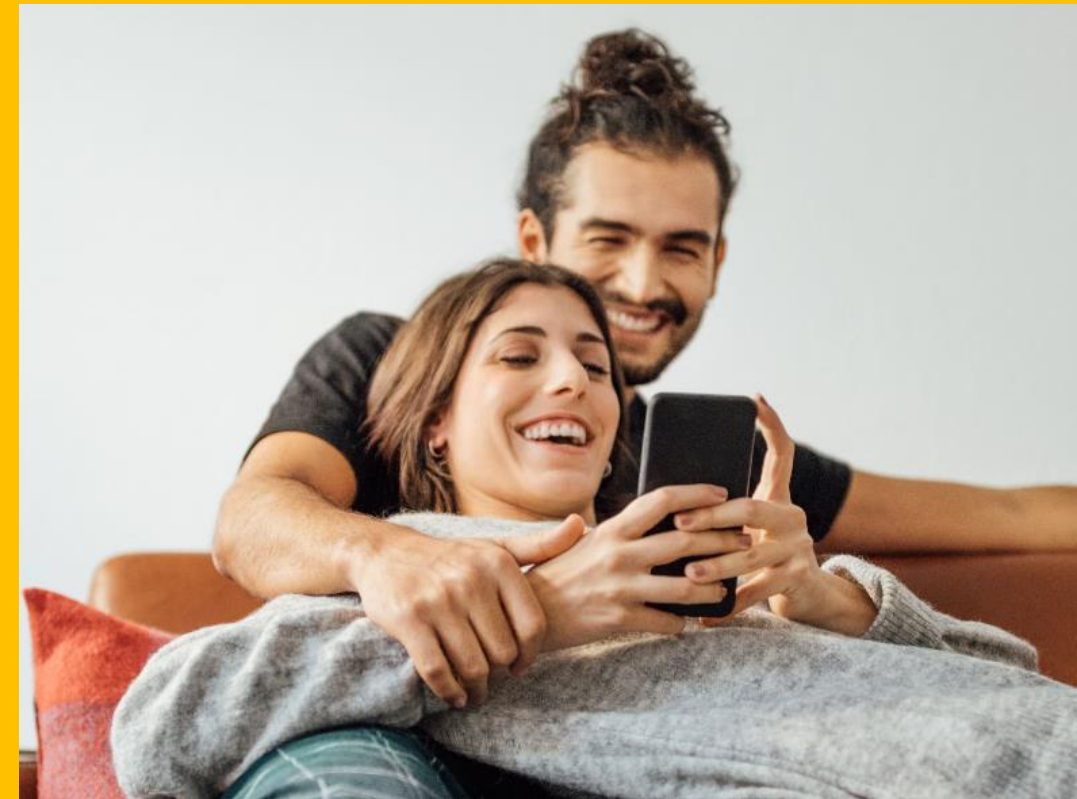
Smartphone users who do not consume news on the device tend to display traditional views

'The Who'

6.3m
14% of GB
smartphone adults

54%
Male

"I'm more likely to buy a product if I can feel and touch it first"

(ix: 113, 70%)

Span a range of ages

"I should do a lot more about my health"

(ix: 113, 65%)

64%
C2DE

"A mother should put her children before her career"

(ix:120, 57%)

Traditional forms of media and marketing are more likely to resonate with this group and they tend to be easily influenced by others

Media Attitudes

"I like to receive loyalty rewards through the post"

(ix: 110, 62%)

"Addressed mail can positively influence my opinion of a company or brand"

(ix: 109, 39%)

"I prefer local radio because it covers local news"

(ix:117, 35%)

Media Frequencies

Newspaper

Out of home media

Radio

Less likely to be heavy users

Most differentiating media

They overindex when it comes to:

Staying updated with the weather/ traffic reports on the radio

Learning about DIY in the newspapers

Choosing to read magazines with sports content

Please see additional information about media preferences and media attitudes in appendix

KANTAR

Above average: Index > 120   Below average: Index < 80

Below average consumption of news across all media types with search, social media and shopping leading types of website visited

Internet usage (last 6 months)

Emailing	**88%**	101
Instant messaging	**71%**	100
Watching online videos	**41%**	100
Games	**31%**	117
Playing games online (excluding gambling)	**27%**	102
Work related research	**25%**	103

News consumption across platform

Read newspapers	**52%**	90
Read/browse news/current affairs content on the Internet	**49%**	83
News/Current Affairs on TV	**38%**	88
Listen to news/current affairs on radio	**33%**	87
Use social networking sites for news/current affairs	**31%**	95

Ways of reading newspapers and magazines

A paper copy	**50%**	98
On a computer via the website of the magazine or newspaper	**18%**	86
On a computer via a downloaded digital version	**4%**	107

Websites visited (L4W)

Google	**74%**	99
Facebook	**58%**	84
Amazon	**45%**	**79**
YouTube	**37%**	81
eBay	**33%**	**79**
Argos	**23%**	85
BBC Sport	**17%**	**76**
Yahoo!	**16%**	89
Gumtree	**15%**	**135**
Tesco	**14%**	**73**
Asda	**12%**	**73**
AOL	**5%**	**123**

Above average: Index > 120   Below average: Index < 80

KANTAR

Typically, below average usage of the BBC, with the exception of news and local BBC content.

BBC Channels watched 'Last week'

59% (ix: 90)

30% (ix: **72)**

BBC TV 'specially choose to watch'

27% BBC Six O'clock News (ix:119)

23% BBC One Early Evening Regional News at 6.30 (ix:**121**)

BBC Radio 'Last week'

15% BBC Local (ix: **130**)

Please see additional information about the BBC relationship in appendix

Above average: Index > 120   Below average: Index < 80

Smartphone news consumers by news journey

News Journeys – User Profile Overview

		Info-Led: Web Browser: News Dominant	Info-Led: Web Browser: Web Browser Dominant	Info-Led: News Grouping	Info-Led: Search	Social: Instant Messenger	Social: Social Media
Size / share of smartphone population		3.8 mill (8%)	6.2 mill (14%)	2.3 mill (5%)	4 mill (9%)	2.8 mill (6%)	2.9 mill (6%)
Age and gender		Women 45-64	Slight skew women 25-44	Men 25-34	Men 65+	Women 16-34	Women 25-34
Income and working status		Full time workers, high income	Full time workers, high income	Full time workers, high income	Retired	Full time education, Full time workers	Full time workers, Average income
General attitudes		Conscious of social and environmental factors	Appreciates the finer things in life	Risk adverse, level headed and compassionate	Financially savvy and lead a healthy social life	Worried about both their image and their environment	Convenience is key. Interested in international events
Internet & Media attitudes		Digital dependents, rely on the internet	Rely on the internet Prefer TV on-demand	Bombarded by advertising, Listen to radio intently for news	Distrusting of advertising and favours local news sources	Digital natives, dependent on the internet	Check social media constantly Not open to TV or mail ads
BBC News app / site		29% (ix:137) 61% (ix:135)	39% (ix:184) 57% (ix:127)	40% (ix:195) 75% (ix:167)	33% (ix:158) 59% (ix:132)	22% (ix:106) 41% (ix:91)	36% (ix:174) 56% (ix:124)
Engage-ment with smartphone news		Average	Low	High	Low	Low	Low

# Overlap between the segments

It is possible for the same person to undertake multiple journeys, therefore they are not mutually exclusive

	Info - Led: Web Browser News Dominant	Info - Led: Web Browser WB Dominant	Info - Led: Search	Info - Led: News Grouping	Social: IM	Social: Social Media
Info - Led: Web Browser News Dominant	100%	30%	7%	62%	24%	12%
Info - Led: Web Browser WB Dominant	53%	100%	25%	53%	20%	26%
Info - Led: Search	8%	16%	100%	15%	12%	18%
Info - Led: News Grouping	42%	20%	9%	100%	8%	7%
Social: IM	20%	9%	8%	10%	100%	15%
Social: Social Media	10%	12%	13%	9%	15%	100%

Note: Those on Info-Led Web Browser, News Dominant journeys are also likely to have had an Info-Led Web Browser, Web Browser Dominant journey or an Info-Led: News Grouping journey. There is less cross over between the Social groups.

KANTAR

INFO-LED | Web browser, News Dominant

'The What'

Habitual consumption
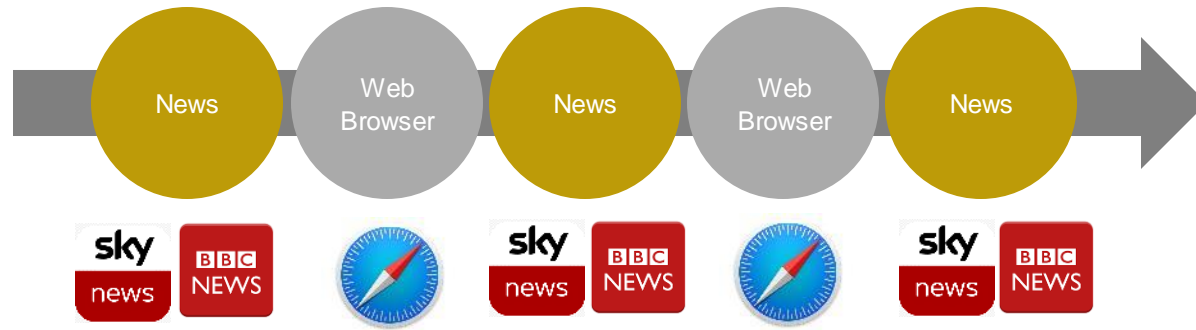
- Average news engagement

- Part of a longer session in the morning and at night - suggests a routine

- One news brand used most often - despite a broad news repertoire

- Web browser used to engage further with the articles

42

INFO-LED | Web browser, News Dominant

'The Who'

3.8m

8% of GB smartphone adults

57%

Female

42%

45-64 yrs

71%

ABC1

"I am interested in other cultures"

(ix: 120, 80%)

"I am worried about pollution and congestion caused by cars"

(ix: 125, 74%)

"I am prepared to pay more for products that make life easier"

(ix:130, 62%)

Please see additional information about demographics and lifestyle attitudes in appendix

Digital content is key for this group and many are influenced by brand placement and advertising

Media Attitudes

"I feel lost without my mobile phone"
(ix: 114, 71%)

"I often notice products or brands that appear in TV programmes and films"
(ix: 122, 43%)

"I like to follow on social media the magazines/ newspapers that I read"
(ix: 137, 32%)

Media Frequencies

Magazine

Less likely to be heavy users

Radio

More likely to be heavy users

Most differentiating media

They overindex when it comes to:

- Keeping up with national news in newspapers and magazines
- Getting their weather report from newspapers and on the radio
- They go online to keep up with politics, finance and the economy

KANTAR

Above average: Index > 120   Below average: Index < 80

Wide engagement with news amongst this group, with BBC News the preferred news brand

Internet Usage (last 6 months)

Reading other news articles	63%	137
Making video calls	62%	153
Making internet voice calls	59%	150
Reading newspaper articles	58%	127
Listening to music	55%	120

News apps (last 12 months)

BBC News	29%	137
Sky News	17%	238
Daily Mail	12%	142
The Sun	6%	127
The Times	6%	320

Websites visited (Last 4 Weeks)

Amazon	74%	131
BBC News	61%	135
eBay	59%	142
Twitter	40%	121
BBC Sport	36%	162
BBC iPlayer	36%	181
Mail Online	32%	190
Sky	25%	246
The Guardian	25%	158
Sainsbury's	23%	171
Groupon	23%	133
The Telegraph	21%	226

News consumption across platform

Read/browse news/current affairs content on the Internet	76%	128
Read newspapers	58%	99
Listen to news/current affairs on radio	47%	122
Use social networking sites for news/current affairs	37%	113
Watch news/current affairs on TV	36%	84

Ways of reading newspapers and magazines

A paper copy	42%	82
On a smartphone via the app/internet site of the newspaper or magazine	36%	191
On a computer via the website of the magazine or newspaper	25%	120
On a tablet via a downloaded digital version	10%	563
On a tablet via the app/internet site of the newspaper or magazine	10%	186

KANTAR

Above average: Index > 120   Below average: Index < 80

Over representation of BBC News viewers and heavy BBC Radio listeners, likely to turn to a mix of BBC stations

BBC

BBC Channels watched 'Last week'

74% (ix: 113)

63%
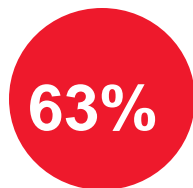
Light BBC One Viewers

(vs 52% of average smartphone user)

BBC TV 'specially choose to watch'

33% BBC 10 O'clock News (ix: **164**)

24% BBC One O'clock News (ix: **210**)

BBC Radio 'Last week'

BBC RADIO **2**   BBC RADIO **1**   BBC RADIO **4**

15%

Heavy BBC Radio listeners

(vs 6% of average smartphone user)

Please see additional information about the BBC relationship in appendix

KANTAR

Above average: Index > 120   Below average: Index < 80

INFO-LED | Web browser, Web Browser Dominant

'The What'

Web Browser | Web Browser | News | Web Browser | Web Browser
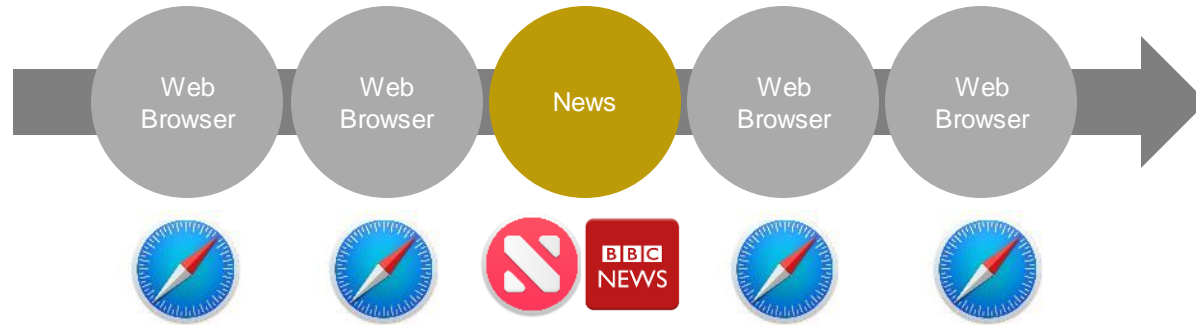
- Lower news engagement

- Incidental or goal-driven news consumption

- Browsing during night routine

Goal-driven consumption **Incidental consumption**

47

INFO-LED | Web browser, Web Browser Dominant

'The Who'

6.2m

14% of GB smartphone adults

53%

Female

47%

25-44 yrs

56%

ABC1

"I look on the work I do as a career rather than just a job"

(ix: 152, 57%)

"I do some form of sport or exercise at least once a week"

(ix: 122, 64%)

"I am prepared to pay more for products that make life easier"

(ix: 120, 57%)

KANTAR

Rely on the internet and mobile phone, with consumption of newspapers and magazine less likely. Many have strong preferences and opinions about TV

"I think people rely too much on TV for relaxation" (ix: 121, 69%)

"I am constantly looking to see if I have a message or e-mail on my mobile" (ix: 118, 57%)

"I read printed magazines less now that they are available online" (ix:132, 44%)

Magazine

Newspaper

Less likely to be heavy users

They overindex when it comes to:

Searching for information about food, drink and recipes in newspapers, magazines and online

Staying up to date with news and current affairs on the radio

Searching for music on the internet

Please see additional information about media preferences and media attitudes in appendix
Please see appendix for heavy user definitions

KANTAR

Above average: Index > 120 Below average: Index < 80

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: All smartphone users; Info-Led: Web Browser, Web Browser Dominant (n=145)

Digital and radio consumption of news is strong amongst this group with BBC News, BBC Sport and iPlayer amongst the top sites visited.

Internet Usage (last 6 months)

Instant messaging	78%	109
Paying bills and other admin	66%	114
Reading other news online (e.g. BBC News)	57%	124
Listening to music	55%	120
Making video calls	52%	128
Reading newspaper articles	51%	111

News apps (last 12 months)

BBC News	39%	184
Sky News	10%	144
Huffington Post	9%	326
Metro	4%	146
The Times	3%	141

Websites visited (Last 4 Weeks)

BBC News	57%	127
eBay	50%	122
Twitter	40%	121
BBC Sport	29%	129
BBC iPlayer	28%	143
Mail Online	26%	150
The Guardian	24%	151
The Telegraph	22%	230
ITV	17%	181
Your M&S (marksandspencer.com)	16%	130
Sainsbury's	16%	121
The Sun	15%	138

News consumption across platform

Read/browse news/current affairs content on the Internet	68%	115
Listen to news/current affairs on radio	50%	129
Read newspapers	50%	87
Use social networking sites for news/current affairs	37%	113
Watch news/current affairs on TV	35%	83

Ways of reading newspapers and magazines

A paper copy	36%	70
On a tablet via a downloaded digital version	7%	378
On a tablet via the app/internet site of the newspaper or magazine	13%	235
On a computer via a downloaded digital version	8%	219
On a smartphone via the app/internet site of the newspaper or magazine	29%	150

KANTAR

Above average: Index > 120   Below average: Index < 80

INFO-LED | News Grouping

'The What'

News — Web Browser — News_Multi

Habitual consumption

Goal-driven consumption

- High news engagement

- Journey dedicated to news

- Few trusted sources in journey engaged with heavily

- May react to a notification or come across a topic through the other session steps

KANTAR

INFO-LED | News Grouping

'The Who'

2.3m
5% of GB
smartphone adults

57%
Male

26%
25-34 yrs

67%
ABC1

"I check a number of sources before making a significant purchase"

(ix: 125, 94%)

"It is important to respect traditional customs and beliefs"

(ix: 124, 92%)

"To stay healthy, it is important to exercise regularly"

(ix:121, 92%)

Please see additional information about demographics and lifestyle attitudes in appendix

Heavy media and news consumers with many feeling harassed by advertising

Media Attitudes

"I find advertising on social media intrusive"

(ix: 121, 71%)

"I always listen to the radio more intently when the news comes on"

(ix: 136, 63%)

"I enjoy reading newspapers most days"

(ix:155, 44%)

Media Frequencies

Newspaper **Out of home media** **Radio** **Internet**

More likely to be heavy users

Most differentiating media

They overindex when it comes to:

Finding out the latest national and European news stories in newspapers

Keeping up with politics on the internet and in magazines

Listening out for news and current affairs, as well as traffic and weather updates on the radio

KANTAR

Above average: Index > 120   Below average: Index < 80

Wide engagement with news evident amongst this group as well as a strong representation of BBC touchpoints in their online behaviour

Internet Usage (last 6 months)

Paying bills and other admin	71%	**123**
Reading other news online	69%	**148**
Consulting maps/ route planning	68%	**142**
Reading newspaper articles	58%	**126**
Listening to music	58%	**126**
Looking for practical information (recipes, ideas for home décor etc.)	57%	**143**

News consumption across platform

Read/browse news/current affairs content on the Internet	81%	**136**
Read newspapers	62%	107
Listen to news/current affairs on radio	55%	**143**
Watch news/current affairs on TV	43%	101
Use social networking sites for news/current affairs	27%	83

News apps (last 12 months)

BBC News	40%	**194**
Sky News	19%	**259**
The Guardian	14%	**254**
The Times	6%	**332**
Huffington Post	4%	**156**

Ways of reading newspapers and magazines

A paper copy	49%	96
On a tablet via a downloaded digital version	15%	**832**
On a tablet via the app/internet site of the newspaper or magazine	18%	**327**
On a smartphone via the app/internet site of the newspaper or magazine	41%	**213**
On a computer via the website of the magazine or newspaper	40%	**191**

Websites visited (Last 4 Weeks)

BBC News	75%	**167**
Amazon	69%	**121**
eBay	61%	**149**
Twitter	41%	**124**
BBC Sport	38%	**172**
Mail Online	38%	**223**
The Guardian	35%	**220**
Argos	33%	**123**
The Telegraph	30%	**318**
BBC iPlayer	30%	**153**
IMDB	28%	**151**
Tesco	28%	**146**

KANTAR

Above average: Index > 120 Below average: Index < 80

Above average representation of heavy consumers of BBC One and BBC Radio; they seek out news programmes when watching BBC.

BBC

BBC Channels watched 'Last week'

BBC ONE

75% (ix: 114)

12%

Heavy BBC One Viewers

(vs 6% of average smartphone user)

BBC TV 'specially choose to watch'

42% BBC 10 O'clock News (ix: **207**)

31% BBC Six O'clock News (ix: **141**)

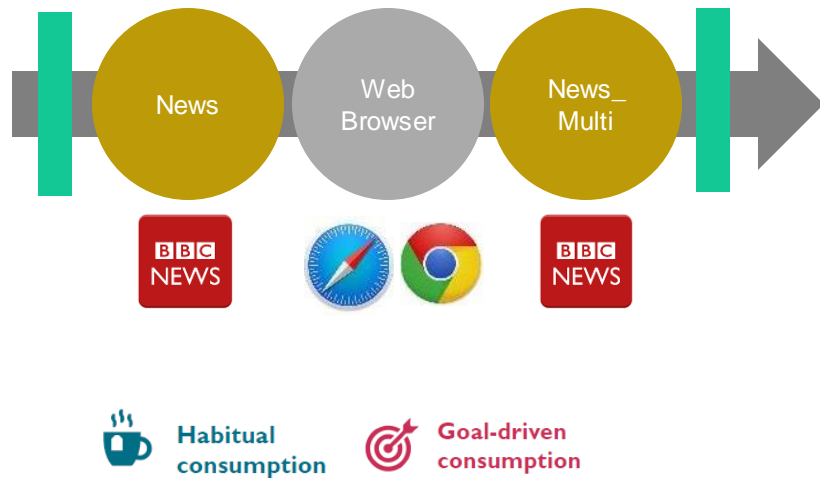**BBC Radio 'Last week'**

BBC RADIO **4**   BBC RADIO **2**

19%

Heavy BBC Radio listeners

(vs 6% of average smartphone user)

Please see additional information about the BBC relationship in appendix

KANTAR

Above average: Index > 120   Below average: Index < 80

INFO-LED | Search

'The What'

Search — Web Browser — News

Goal-driven consumption
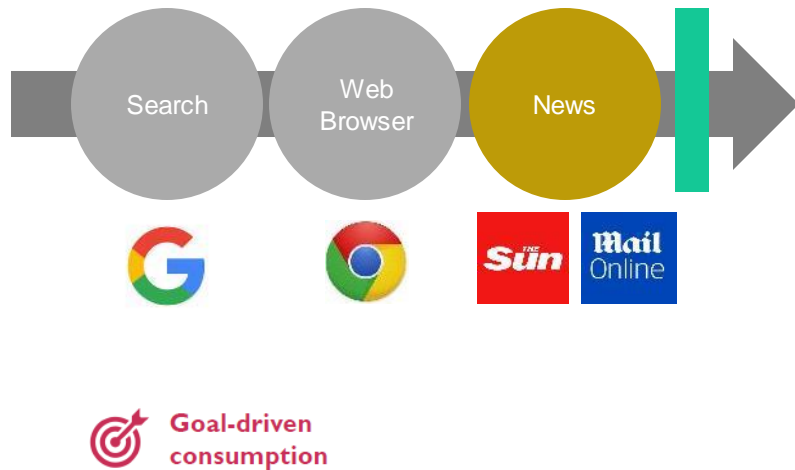
- Short time spent on news as a last step suggests goal-driven consumption

- Journey likely linked to exposure to some information

- Part of a morning routine

- Search is specific and relevant articles found are only read briefly

- Smartphone session completed once article is found

INFO-LED | Search

'The Who'

59%

Male

27%

65+ yrs

65%

ABC1

"Financial security after retirement is your own responsibility"

(ix: 126, 77%)

"Switching utility suppliers is well worth the effort"

(ix: 130, 76%)

"I consider my diet to be very healthy"

(ix:140, 54%)

Evidence of more traditional views and behaviour with regards media and advertising despite a high level of dependence on mobile phone internet

Media Attitudes

"I think quite a lot of TV advertising is devious"
(ix: 111, 53%)

"I set aside specific time to look through the mail I receive"
(ix: 132, 44%)

"I always listen to the radio more intently when the news comes on"
(ix:134, 63%)

Media Frequencies

Internet   Cinema

Magazine

Less likely to be heavy users

More likely to be heavy users

Most differentiating media

They overindex when it comes to:

Reading about local news in the papers

Tuning into the news and current affairs on the radio and on TV

Keeping up with the latest science and technology online and in magazines

Please see additional information about media preferences and media attitudes in appendix
Please see appendix for heavy user definitions

KANTAR

Above average: Index > 120   Below average: Index < 80

Broad engagement with news across media, especially online and radio. Using social media for news is unlikely, though.

Internet Usage (last 6 months)

Online Shopping	86%	107
Viewing weather forecasts	73%	124
Reading newspaper articles	61%	134
Reading other news online	54%	117
Looking for user reviews before purchasing	53%	129
Consulting maps/ route planning	52%	108

News consumption across platform

Read/browse news/current affairs content on the Internet	71%	120
Listen to news/current affairs on radio	54%	140
Read newspapers	54%	94
Watch news/current affairs on TV	43%	101
Use social networking sites for news/current affairs	21%	65

News apps (last 12 months)

BBC News	33%	158
Sky News	12%	163
Huffington Post	11%	404
Daily Mail	8%	93
The Sun	5%	97

Ways of reading newspapers and magazines

A paper copy	50%	98
On a smartphone via the app/internet site of the newspaper or magazine	34%	178
On a computer via the website of the magazine or newspaper	27%	129
On a tablet via the app/internet site of the newspaper or magazine	11%	199
On a computer via a downloaded digital version	10%	266

Websites visited (Last 4 Weeks)

BBC News	59%	132
eBay	52%	126
BBC Sport	34%	151
Tesco	32%	165
Mail Online	29%	170
The Sun	26%	239
IMDB	25%	136
The Guardian	24%	155
Yahoo!	24%	134
MSN	23%	222
ASDA	22%	131
The Telegraph	21%	219

KANTAR

Above average: Index > 120 Below average: Index < 80

These news journey consumers have a moderate relationship with the BBC across other channels

BBC

BBC Channels watched 'Last week'

BBC ONE

69% (ix: 106)

32%

Medium BBC One Viewers

(vs 20% of average smartphone user)

BBC iPlayer usage

iPlayer
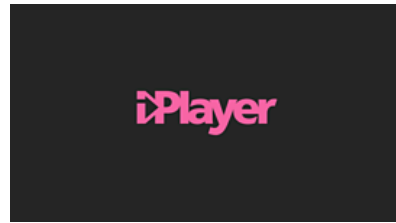
52% TV Set (ix: **156**)

BBC Radio 'Last week'

BBC RADIO 2 **BBC RADIO 1** **BBC RADIO 4**

25%

Medium BBC Radio listeners

(vs 14% of average smartphone user)

Please see additional information about the BBC relationship in appendix

KANTAR

Above average: Index > 120   Below average: Index < 80

SOCIAL| Instant Messenger

'The What'
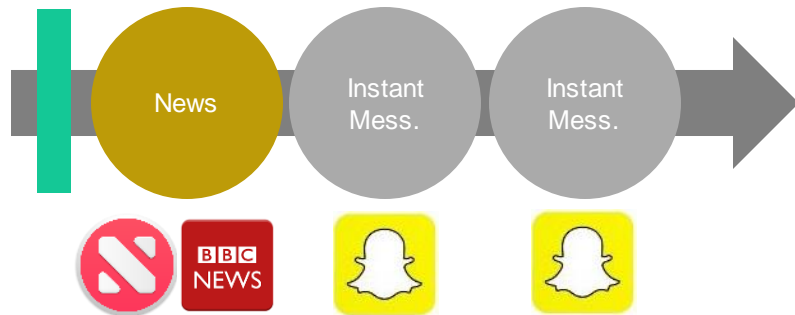
- Spontaneous news consumption suggested by low engagement with first step

- Journey could be triggered by notification from a dedicated or aggregator news app

- Habitually engaged by news app push alerts

SOCIAL | Instant Messenger
'The Who'

2.8m
6% of GB smartphone adults

58%
Female

61%
16-34 yrs

70%
BC1

"I am worried about pollution and congestion caused by cars"

(ix:125, 74%)

"I worry a lot about myself"

(ix:161, 67%)

"I like simple décor with minimal furniture and clutter"

(ix: 123, 68%)

Digital media is key amongst this group and for many, TV is a favourite pastime

"I feel the need to check social networking sites every day"
(ix: 131, 67%)

"I am constantly looking to see if I have a message or e-mail on my mobile"
(ix: 141, 68%)

"I save up programmes I've recorded or downloaded and watch them back to back"
(ix:125, 57%)

Less likely to be heavy users

Newspaper

Out of home media

Radio

They over index when it comes to:

Keeping up with the latest sports news on TV

Checking in on the latest political news in newspapers

Watching Comedy films in the cinema

KANTAR

Above average: Index > 120   Below average: Index < 80

Lower engagement with news and current affairs, favouring entertainment, social media and communications activities online

Internet Usage (last 6 months)

Instant messaging	**85%**	118
Social Networking (e.g. Facebook, MySpace)	**63%**	101
Listening to music	**54%**	117
Making video calls	**49%**	**121**
Making internet voice calls	**49%**	**125**
Watching online videos	**46%**	111

News consumption across platform

Read/browse news/current affairs content on the Internet	**55%**	92
Read newspapers	**46%**	80
Use social networking sites for news/current affairs	**38%**	116
Watch news/current affairs on TV	**31%**	**73**
Listen to radio for News/Current Affairs	**29%**	**74**

News apps (last 12 months)

BBC News	**22%**	106
Daily Mirror	**5%**	**236**
The Guardian	**5%**	85
Metro	**3%**	89
Huffington Post	**2%**	85

Ways of reading newspapers and magazines

Paper copy	**35%**	**69**
On a smartphone via the app/internet site of the newspaper or magazine	**17%**	92

Websites visited (Last 4 Weeks)

Google	**85%**	113
Facebook	**78%**	114
Amazon	**64%**	113
Twitter	**38%**	115
IMDB	**22%**	119
Sky	**16%**	**162**
Cineworld	**15%**	**167**
Metro	**15%**	**173**
Odeon	**12%**	**194**
Google+	**12%**	107
Channel 4	**10%**	111
Vue Cinemas	**10%**	**135**

KANTAR

Above average: Index > 120 Below average: Index < 80

Light engagement with the BBC across other platforms. Programmes of choice include reality shows such as The Apprentice and MasterChef.

BBC

BBC Channels watched 'Last week'

BBC One	**57%**	87
BBC Two	**26%**	**62**
BBC Four	**8%**	**43**

BBC iPlayer usage

iPlayer
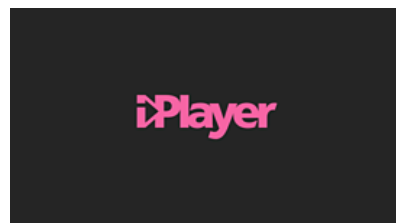
19% Computer (ix: **121**)

17% Mobile device (ix: **140**)

BBC Radio 'Last week'

Radio 1	**24%**	114
Radio 2	**19%**	**78**
Radio 5 Live	**6%**	**44**

Please see additional information about the BBC relationship in appendix

KANTAR

Above average: Index > 120 Below average: Index < 80

66

Note: Small sample size, margins of error may be relatively large

SOCIAL | Social Media

'The What'
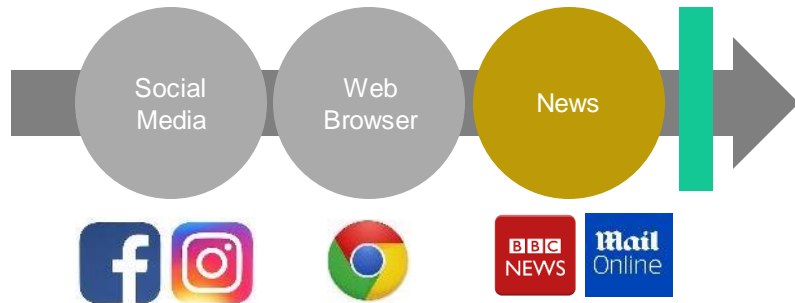
- Less time spent and fewer news sources consulted

- Incidental news consumption as part of morning routine

- Web formats preferred, with search triggered by social media

- Session closed after consuming news

SOCIAL | Social Media

'The Who'

2.9m
6% of GB
smartphone adults

55%	37%	66%
Female	25-34yrs	BC1

"I like to have technology that makes life easier at home"

(ix: 120, 77%)

"I am interested in international events"

(ix:130, 74%)

"I think smoking e-cigarettes in public places should be banned"

(ix: 135, 68%)

Please see additional information about demographics and lifestyle attitudes in appendix

Digital media is key amongst this group

"I couldn't live without the internet on my mobile phone"

(ix: 129, 79%)

"I feel the need to check social networking sites every day"

(ix: 120, 61%)

"Nearly all TV advertising annoys me"

(ix:124, 64%)

Media Frequencies

Newspaper   Radio   TV

Less likely to be heavy users

Out of home media

More likely to be heavy users

Most differentiating media

They overindex when it comes to:

Catching up with political news on the internet and in newspapers

Keeping up with their favourite sports in magazines

Staying up to date with European news in the newspapers

Please see additional information about media preferences and media attitudes in appendix
Please see appendix for heavy user definitions

KANTAR

Above average: Index > 120   Below average: Index < 80

69

Note: Small sample size, margins of error may be relatively large

Social media, messaging, and news consumption dominate internet usage. BBC News the top news app visited and third highest website

Internet usage (last 6 months)

Instant messaging	81%	113
Viewing weather forecasts	69%	117
Reading other news online (e.g. BBC News)	69%	149
Reading newspaper articles	61%	133
Looking for practical information (e.g. recipes, ideas for home décor etc)	52%	132
Reading Twitter feeds/Tweeting	51%	169

News consumption across platform

Read/browse news/current affairs content on the Internet	75%	127
Read newspapers	55%	95
Use social networking sites for news/current affairs	40%	124
Listen to news/current affairs on radio	35%	92
Watch news/current affairs on TV	33%	78

News apps (last 12 months)

BBC News	36%	174
Daily Mail	11%	131
Metro	9%	307
Daily Express	9%	533
Daily Telegraph	7%	483

Ways of reading newspapers and magazines

Paper copy	42%	82
Computer via website of magazine/paper	22%	106
Smartphone via app/ internet site	17%	92
Tablet via app/ internet site	12%	220

Websites visited (Last 4 Weeks)

YouTube	63%	138
Twitter	56%	169
BBC News	56%	124
Asda	31%	183
BBC Sport	29%	130
IMDB	25%	135
Mail Online	24%	144
The Guardian	23%	144
Pinterest	22%	132
Sainsbury's	20%	146
The Independent	18%	231
Gumtree	18%	154

Above average: Index > 120   Below average: Index < 80

KANTAR

Broadly average relationship with BBC TV channels, chat show content preferred. Likely listeners of Radio 2

BBC Channels watched 'Last week'

55% (ix: 85)

BBC TV 'specially choose to watch'

27% Breakfast on BBC One (ix: **163**)

18% Newsnight (ix: **219**)

BBC Radio 'Last week'

32% (ix: **134**)

12% (ix: **79**)

Please see additional information about the BBC relationship in appendix

KANTAR

Above average: Index > 120   Below average: Index < 80

Summary and implications

Higher engagement with BBC News mirrors higher engagement with smartphone news in general and vice versa

This group has the highest engagement with both Smartphone news and the BBC. They're typically more loyal with news brands and show higher levels of news consumption across other media platforms.

Info-Led: News Grouping

Those with low engagement are divided across age. The younger cohorts favour media activities such as social media over news. The older groups have a stronger relationship with radio and the BBC is successfully reaching them this way.

This group engage with a wide repertoire of news brands. Overall they have high engagement with BBC News but more so on the website than the BBC App.

Info-Led: Web Browser News Dominant

High

Engagement with Smartphone News

Social: Instant Messenger

Social: Social Media

Info-Led: Web Browser Web Dominant

Info-Led: Search

Low

Usage of BBC News Site

High

KANTAR

Summary and implications for the BBC

Smartphones play a vital role in the life of most GB adults, with many dependant on the device and its access to internet

The majority of smartphone owners consume news on their smartphone, which gives the BBC an enormous potential reach

Over half of smartphone news users have used the BBC News app or website on their smartphone, indicating a strong position but room to grow

BBC News is competing for attention in a crowded market of news websites, apps and aggregators, of social media and messaging services, and other online interests

Smartphone news is only part of the news landscape. Online across devices dominates news consumption but, for many, TV, radio, and newspapers are still strong

Older audiences are heavier listeners of BBC Radio than younger audiences, which may indicate that as this next generation age this form of media consumption may be less relevant

The BBC have a weaker hold on younger, social media focused audiences. This group get their news from social media and BBC is less likely to be top of mind for them

Appendix

TGI Lifestage

TGI Lifestage is a demographics-based segmentation of the entire population

Incorporating detailed household composition data, Lifestage allows you to move beyond standard demographic categorisation

This can be especially useful when used to prise apart market-sensitive differences between people who would otherwise be placed in the same broad target group

TGI Lifestage definitions (GB)
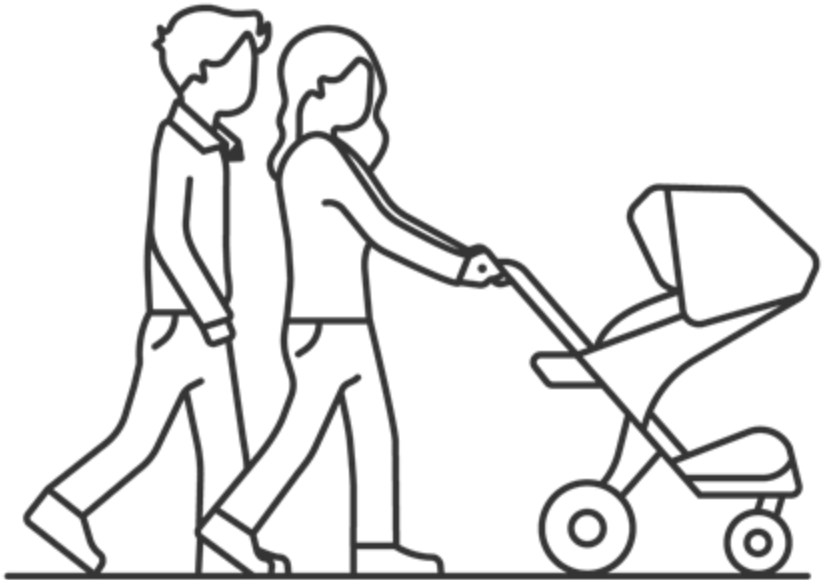
Lifestage	Definition
Fledglings	15-34, not married, no son or daughter, living with parents
Flown The Nest	15-34, not married, do not live with relations
Nest Builders	15-34, married, do not live with son/daughter
Playschool Parents	Live with son/daughter and youngest child 0-4
Primary School Parents	Live with son/daughter and youngest child 5-9
Secondary School Parents	Live with son/daughter and youngest child 10-15
Mid-life Independents	35-54, not married, do not live with relations
Unconstrained Couples	35-54, married, do not live with son/daughter
Hotel Parents	35+, live with son/daughter and no child 0-15
Senior Sole Decision Makers	55+, not married and live alone
Empty Nesters	55+ married and do not live with son/daughter
Non-standard Families	Unmarried, live with relations, not son/daughter, not parents if 15-34

KANTAR

Heavy user definitions

Newspapers: Frequency of reading: Everyday

Magazines: Number of magazines a week: 5+

TV: More than 40 hours per week

Internet: 40 hours or more

Cinema: Once a week or more often

Out of home media: Poster exposure: Travel 9 hours or more a week

Radio: Listen more than 28 hours a week

KANTAR

BBC usage definitions

Heavy	view 4 hours or more a day
Medium	view 2 hours a day
Light	view 1 hour or less a day

Heavy	listen more than 15 hours a week
Medium	5-15 hours a week
Light	Less than 5 hours a week

KANTAR

Smartphone users who do not consume news on the device

6.3m
14% of GB
smartphone adults

- Skew towards men and slight overrepresentation of 55-64 y/os. Tend not to be in work and are likely to be Secondary School Parents or Flown The Nest.

- Typically traditional in their views.

- They tend to be risk averse and influenced by what they read in online, see on TV, and by the companies they support.

- Somewhat less likely to consume news across any media type compared with the average population.

- Below average usage of the BBC, with the exception of local BBC content.

Smartphone users who do not consume news on the device

6.3m people – 14% of GB smartphone users

Who are they?

Men who span a range of ages. They are not in work and are likely to be Secondary School Parents or Flown The Nest.

Mindset

They are loyal to all things GB and old fashioned in their views. They are risk averse and influenced by what they read in online, see on TV, and by the companies they support.

Relationship with news

Slightly below average involvement with news content across media platforms. News sites don't feature in their top 12 sites visited.

Relationship with BBC

The local BBC offer trumps broader/national BBC channels and content amongst non-smartphone users.

Demographics

Non-smartphone news consumers tend to be male, married, and live in the East Midlands. More likely than the average to be retired/Long term illness/disabled and social grade D.

Gender & Lifestage*

54% ♂
46% ♀
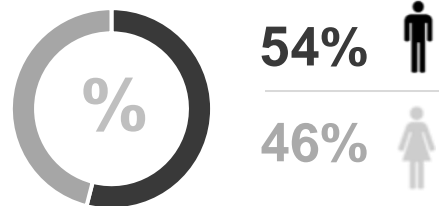
Empty Nesters	**14%**	97
Secondary School Parents	**13%**	**132**
Flown The Nest	**11%**	**178**

Age

16-24	**17%**	105
25-34	**17%**	87
35-44	**17%**	101
45-54	**19%**	106
55-64	**16%**	112
65+	**15%**	92

Other demographics

Marital status

Married	**41%**	97
Single	**30%**	101

Education

University undergraduate degree e.g. Bachelor's: **33%** **128**

Working status

Retired/Long term illness/disabled: **25%** 113

Social Grade

		All PWD
■ A	5%	5%
■ B	17%	17%
■ C1	28%	28%
■ C2	21%	21%
■ D	15%	15%
■ E	14%	14%

Donut chart values: 5%, 17%, 28%, 21%, 15%, 14%

Median HH income

£25,345 annually
10% less than average population

Geographic region

1	**15%**	108 — South East
2	**12%**	**175** — East Midlands
3	**10%**	107 — East of England

Above average: Index > 120   Below average: Index < 80

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: Smartphone users who do not consume news on the device (n=137)

KANTAR
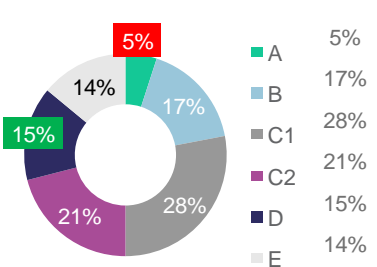
Lifestyle attitudes

The Non-Smartphone News Consumers are more patriotic and old fashioned in their views, agreeing that women should put their children before their career. They tend to be risk averse and easily influenced, more likely to believe recommendations from experts and shape their life based on crime reports in the news.

Most discriminating attitudinal statements (Any Agree) – Top 15*

I'm more likely to buy a product if I can feel and touch it first	70%	113
I should do a lot more about my health	65%	113
I am very good at managing money	64%	116
I am prepared to make lifestyle compromises to benefit the environment	61%	113
My fragrance expresses my personality	58%	117
A mother should put her children before her career	55%	116
Owning stocks and shares is too risky an investment for me	51%	117
When doing the household shopping I budget for every penny	50%	118
I prefer to work as part of a team than work alone	43%	118
I feel reassured using products recommended by an expert	43%	**121**
I would like to set up my own business one day	37%	113
I consider myself to be a spiritual person	36%	115
I would choose a GB car to support the national economy	34%	114
I like to take holidays in my own country rather than abroad	32%	113
Reports on violence and crime affect the way I lead my life	32%	**122**

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

Media preferences

The non-smartphone news consumer is less likely to be a heavy user of newspapers, radio and out of home media. They are more likely to enjoy watching game shows and chat shows on TV and choose to play video games online.

Media Frequencies (Heavy users)
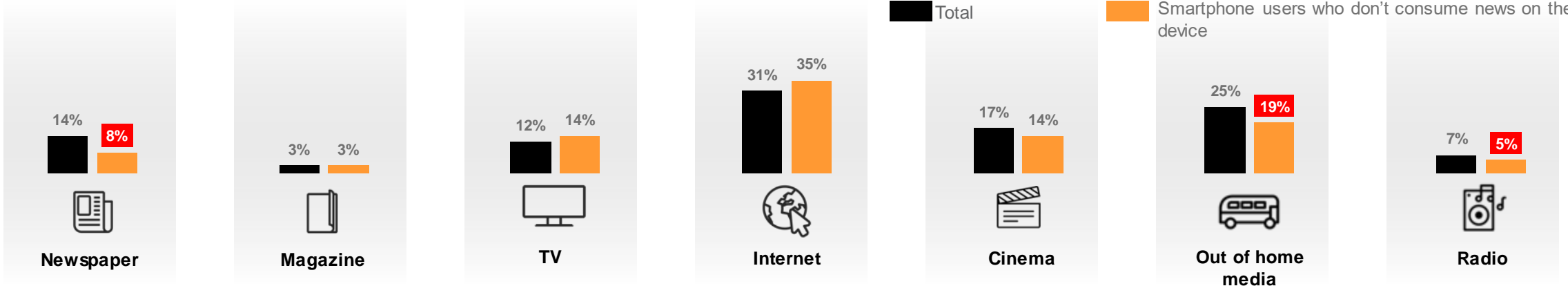
■ Total　■ Smartphone users who don't consume news on the device

Media type ▶

Media type	Total	Smartphone users who don't consume news on the device
Newspaper	14%	8%
Magazine	3%	3%
TV	12%	14%
Internet	31%	35%
Cinema	17%	14%
Out of home media	25%	19%
Radio	7%	5%

Most differentiating media

Note: Media preferences ranked on index vs universe then on penetration (%)

Newspaper	%	Index
Computing/Multimedia/Internet	11%	131
Do-it-Yourself	10%	138
National News	16%	112
Sport	14%	132

TV / Internet / Cinema	%	Index
Games Shows/Quizzes	21%	101
Chat Shows	14%	131
Video games	19%	166
Societal issues (employment, security, citizenship etc)	12%	181
Science Fiction	14%	128
Crime/Thrillers/Mystery	12%	122

OOH / Radio	%	Index
In supermarkets	35%	106
Outside supermarkets	26%	102
Weather/Traffic	29%	121
News/Current Affairs	25%	99

Newspapers: Topics of interest **/ Magazines:** Topics of interest **/ TV:** Types of programmes they watch **/ Internet:** Use for topics **/ Cinema:** Type of movie **/ OOH:** Advertising Seen In Past Week **/ Radio:** Type of radio show listened to

KANTAR

Above average: Index > 120　Below average: Index < 80

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: Smartphone users who do not consume news on the device (n=137)

Media attitudes

Traditional forms of media and marketing resonate with this group. They are likely to be influenced by others whether via addressed mail, online or TV, and are more susceptible to product sponsorship.

Most discriminating media statements (Any Agree) – Top 15*

Statement	%	Index
I like to receive loyalty rewards through the post	62%	110
I always choose not to have my name included on mailing lists	58%	**124**
Addressed mail can positively influence my opinion of a company or brand	39%	109
I prefer to watch television programmes at the time they are broadcast, rather than record them	39%	111
I prefer local radio because it covers local news	35%	117
I tend to be influenced by comments/reviews posted online by other Internet users	35%	111
Well designed poster sites improve the urban landscape	33%	110
I like to follow on social media the magazines/newspapers that I read	26%	112
TV programmes give me practical tips on how to live my life	23%	105
I wish I had a larger selection of TV channels	23%	118
I enjoy watching ads featuring my favourite celebrities	22%	111
I prefer to watch TV on a laptop, tablet or mobile	21%	**120**
TV tends to influence my opinions	21%	110
I prefer to buy products from companies who sponsor sports events and teams	19%	**141**
I prefer to buy products from companies who sponsor exhibitions or music events	17%	**143**

KANTAR

Above average: Index > 120 Below average: Index < 80

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: Smartphone users who do not consume news on the device (n=137)

*Selected based on high level of agreement and high level of differentiation with the avg.

BBC consumption

The local BBC offer appears to be stronger amongst this group than broader/national BBC channels and content. This group are not particularly engaged with BBC TV or iPlayer though may be found watching the BBC Six O'clock news or BBC One early evening regional news. Similarly, BBC radio holds little importance. The exception is BBC Local radio.

Frequency of watching BBC One
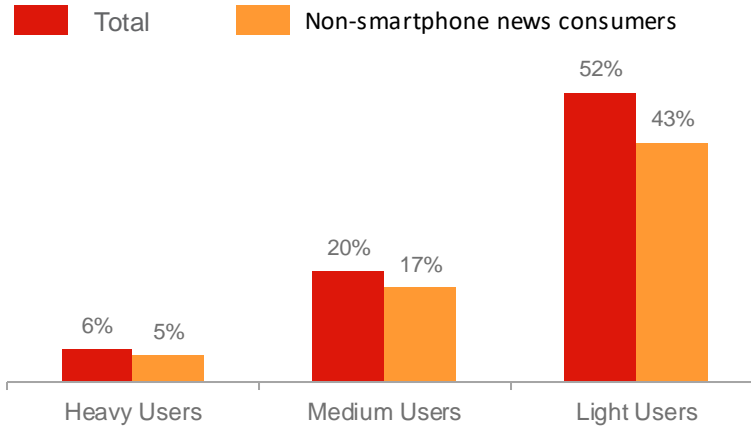
- Total
- Non-smartphone news consumers

	Heavy Users	Medium Users	Light Users
Total	6%	20%	52%
Non-smartphone news consumers	5%	17%	43%

Frequency of listening to BBC Radio

- Total
- Non-smartphone news consumers

	Heavy Users	Medium Users	Light Users
Total	6%	14%	16%
Non-smartphone news consumers	1%	12%	16%
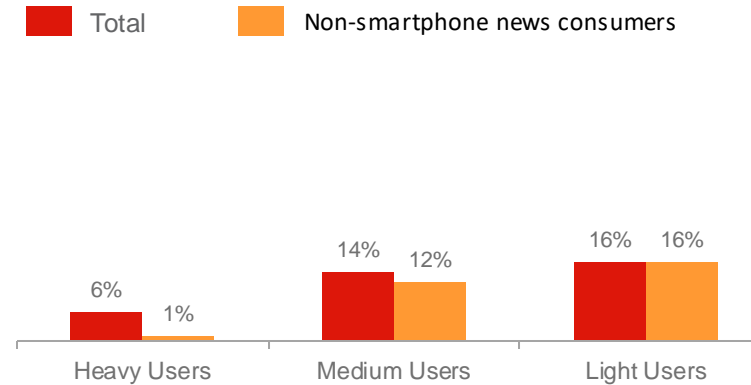
BBC Channels watched (last week)

BBC One	**59%**	90
BBC Two	**30%**	**72**
BBC Four	**18%**	95

BBC iPlayer usage

TV set	**22%**	**67**
Desktop/laptop	**11%**	**69**
Console (e.g. Xbox, Playstation)	**4%**	83

BBC Radio (last week)

Radio 1	**22%**	105
Radio 4	**16%**	107
BBC Local	**15%**	**130**

BBC TV Programmes specially choose to watch

Blue Planet II	**30%**	119
BBC Six O'Clock News	**27%**	119
BBC One Early Evening Regional News at 6.30	**23%**	**121**
The Graham Norton Show	**21%**	**131**
Bargain Hunt	**18%**	**182**

Above average: Index > 120   Below average: Index < 80

INFO-LED | Web browser, News Dominant

'The Who'

- Skew towards women, aged 25-34 or 45-64, live in South of England. Likely to be highly educated, full time workers with a higher than average income.

- Tend to be environmentally and socially conscious individuals who are willing to pay extra for good quality and convenience.

- 76% consume news/current affairs content on the internet (ix: 128)

- 47% listen to news/current affairs on the radio (ix: 122)

- BBC News ranked top news app visited second ranked website. Above average representation of heavy BBC radio listeners and light BBC One viewers.

3.8m
8% of GB smartphone adults

Info-Led: Web Browser, News Dominant

3.5m people – 8% of GB smartphone users

Who are they?
Women, aged 45-64 in the South of England. They are more likely to be highly educated, full time workers with a higher than average income.

Mindset
The are both environmentally and socially conscious individuals who are willing to pay extra for good quality and convenience. They are more reliant on the internet for their news consumption and decision making.

Relationship with news
Digital news consumption is favoured whilst radio news consumption is also common.

Relationship with BBC
Skew towards heavy BBC radio listeners and light BBC One viewers.

Demographics

Smartphone news consumers who have an info-led: Web Browser dominant journey skew towards female, highly educated, full time workers with higher than average social grade and income. Most likely to be aged 45-64 and considered senior sole decision makers.

Gender & Lifestage*

43% (male)
57% (female)

Senior Sole Decision Makers	16%	266
Secondary School Parents	12%	118
Unconstrained Couples	9%	119

Age

16-24	14%	89
25-34	23%	123
35-44	14%	80
45-54	24%	135
55-64	18%	125
65+	7%	44

News Journey

News → Web browser → News → Web browser → News
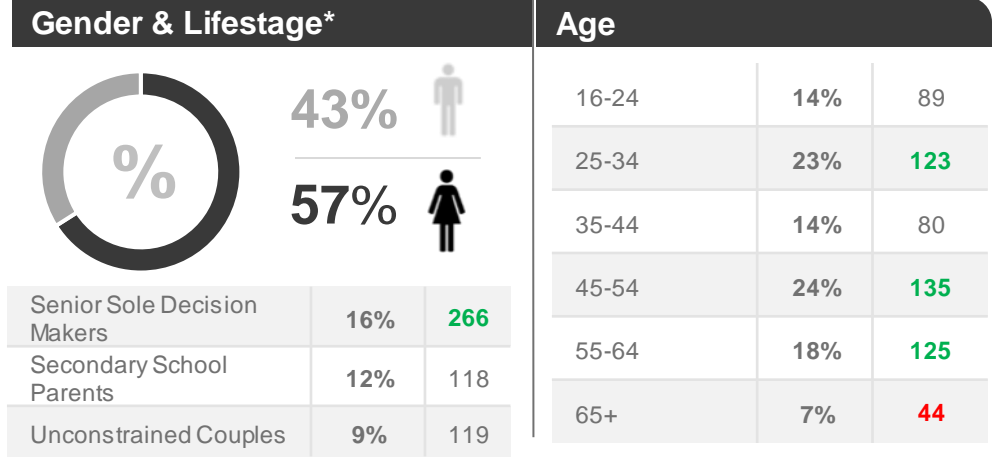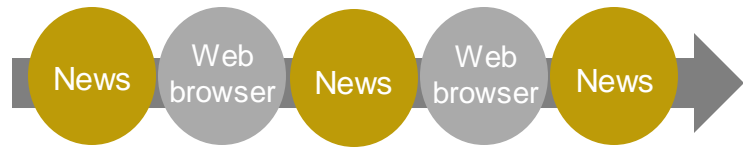
News makes up part of a longer session in the morning and evening, suggesting they are in a routine when it comes to news consumption.

They may search news stories on the web to engage further with articles they have seen on the app.

Other demographics

Marital status

Single	34%	115
Married	34%	81

Working status
Full time – 30+ Hours per week

56%	147

Median HH income

£38,281 annually
35% more than average population

Education
University degree
e.g. Bachelor's / Master's

40%	118

Further qualification
(between high school & university)

21%	124

Social Grade

All PWD

A		14%
B		18%
C1		39%
C2		17%
D		5%
E		8%

Donut chart values: 14%, 18%, 39%, 17%, 5%, 8%

Geographic region

21%	152
London	
16%	175
East of England	
15%	165
South West	

Above average: Index > 120 Below average: Index < 80

KANTAR

Lifestyle attitudes

These individuals are conscious of both social and environmental factors. Many take an interest in cultures and the wider world around them, worry about pollution and are mindful about buying good quality products. Some also care about getting nutritional food and purchasing free range when possible.

Most discriminating attitudinal statements (Any Agree) – Top 15*

Statement	%	Index
I am interested in other cultures	80%	124
It's important to me to feel respected by my peers	76%	120
I tend to always buy the same beauty products	74%	130
I am worried about pollution and congestion caused by cars	74%	125
I try to include plenty of fibre in my diet these days	73%	123
I am interested in international events	73%	128
I am an optimist	72%	121
It's worth paying extra for quality goods	71%	122
The Paralympics made me more positive about what people with disabilities can achieve	69%	127
It is important to be well insured for everything	67%	120
I buy free range products whenever I can	67%	127
My car should be equipped with all possible safety features	65%	120
I always check the nutritional content of food	64%	141
It is important to me to look well dressed	64%	127
I am prepared to pay more for products that make life easier	62%	130

KANTAR

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

Info-Led: Web Browser, News Dominant

Media preferences

Individual with this type of news journey are likely to be heavy radio consumers, listening to updates on current affairs, and weather/ traffic on this platform.

Media Frequencies (Heavy users)

■ Total   ■ Info-Led: Web Browser, News Dominant

Media type ▶

Media type	Total	Info-Led
Newspaper	14%	15%
Magazine	3%	1%
TV	12%	12%
Internet	31%	30%
Cinema	17%	15%
Out of home media	25%	20%
Radio	7%	14%
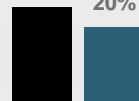
Most differentiating media

Note: Media preferences ranked on index vs universe then on penetration (%)

		%	Index
Newspaper	National News	44%	127
	Weather	26%	163
Magazine	Local News	23%	165
	National News	18%	203

		%	Index
TV	Documentaries	34%	126
	Reality TV	24%	156
Internet	Politics	26%	184
	Finance and the economy	25%	184
Cinema	Comedy	18%	142
	Crime/Thrillers/Mystery	12%	124

		%	Index
OOH	Advertising in supermarkets	41%	124
	Any Advertising on the Underground Network	24%	200
Radio	News/Current Affairs	32%	128
	Weather/Traffic	30%	126

Newspapers: Topics of interest / **Magazines:** Topics of interest / **TV:** Types of programmes they watch / **Internet:** Use for topics / **Cinema:** Type of movie / **OOH:** Advertising Seen In Past Week / **Radio:** Type of radio show listened to

KANTAR

Info-Led: Web Browser, News Dominant

Media attitudes

The internet and mobile phones play a critical role in the lives of these individuals. Many are cognizant of brands featured in TV/films and can be influenced by direct mail and TV adverts. Some take pleasure in reading newspapers most days and read the financial pages. What was traditionally printed content is these days most likely read online and via a publication's social media pages.

Most discriminating media statements (Any Agree) – Top 15*

Statement	%	Index
I feel lost without my mobile phone	71%	114
I couldn't live without the internet on my mobile phone	70%	114
I enjoy seeing films at the cinema more than on TV	55%	128
I trust the Cloud to keep my data secure	49%	116
I often record a programme on TV then don't get a chance to watch it	48%	115
I often notice products or brands that appear in TV programmes and films	43%	122
Addressed mail can positively influence my opinion of a company or brand	43%	118
I prefer to watch television programmes at the time they are broadcast, rather than record them	41%	116
I read printed magazines less now that they are available online	41%	122
I enjoy reading newspapers most days	32%	114
I like to follow on social media the magazines/newspapers that I read	32%	137
Whilst watching TV, I search on the internet for products I see advertised	31%	117
Relevant direct mail can change my opinion of a company or brand	31%	133
I read the financial pages of my newspaper	28%	138
TV programmes give me practical tips on how to live my life	26%	115

Above average: Index > 120   Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

BBC consumption

This group displays an over representation of heavy BBC Radio listeners but light BBC One viewers despite the majority of the group watching the channel. This group use a variety of devices to catch up on content on BBC iPlayer

Frequency of watching BBC One
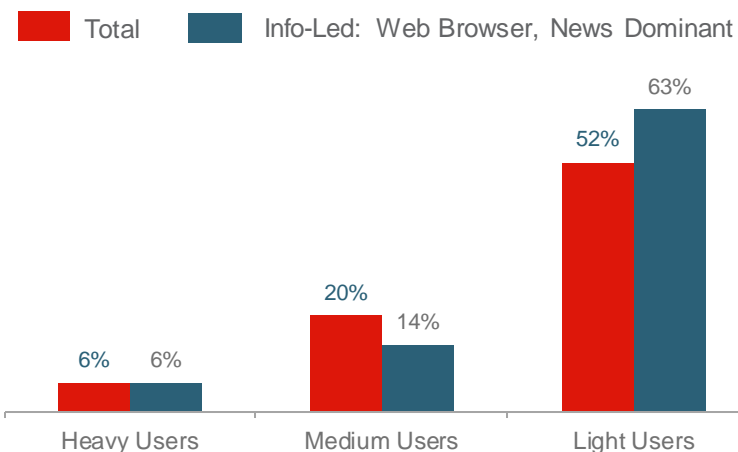
■ Total   ■ Info-Led: Web Browser, News Dominant

	Heavy Users	Medium Users	Light Users
Total	6%	20%	52%
Info-Led	6%	14%	63%

Frequency of listening to BBC Radio

■ Total   ■ Info-Led: Web Browser, News Dominant

	Heavy Users	Medium Users	Light Users
Total	6%	14%	16%
Info-Led	15%	12%	9%
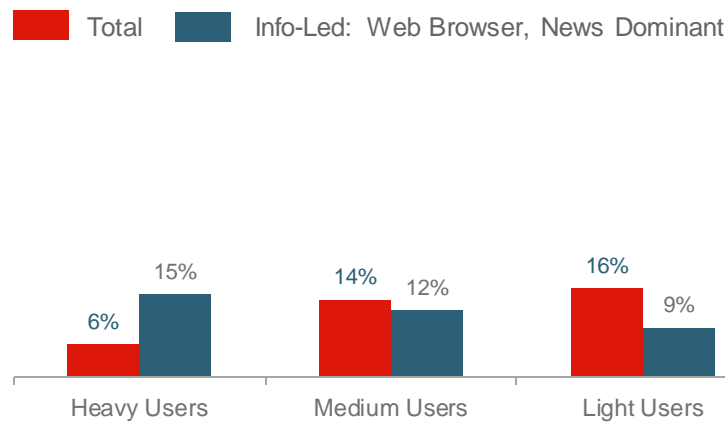
BBC Channels watched (last week)

BBC One	**74%**	113
BBC Two	**44%**	104
BBC Four	**17%**	94

BBC iPlayer usage

TV set	**39%**	118
Mobile Phone/Tablet/Other Mobile Device	**27%**	**230**
Desktop/Laptop	**25%**	**160**
Console	**8%**	**174**

BBC Radio listened to (last week)

Radio 2	**27%**	116
Radio 1	**26%**	**124**
Radio 4	**23%**	**149**

BBC TV Programmes specially choose to watch

2018 FIFA World Cup	**38%**	**162**
BBC 10 O'clock News	**33%**	**164**
Strictly Come Dancing	**24%**	**122**
BBC One O'clock News	**24%**	**210**
Have I Got News For You	**21%**	**122**

Above average: Index > 120   Below average: Index < 80

KANTAR

INFO-LED | Web browser, Web Browser Dominant

'The Who'

- Skew towards females, aged 25-44, children in the home. Tend to be full time workers with higher than average income who have completed high school or attained a postgraduate degree.

- Tend to be career focused, health conscious and convenience seeking

- 68% consume news/current affairs content on the internet (ix: 115)

- 50% listen to news/current affairs on the radio (ix: 129)

- Above average listening to BBC Radio and moderate viewing of BBC One whilst BBC News is ranked number one site/app visited

6.2m
14% of GB
smartphone adults

Info-Led: Web Browser, Web Browser Dominant

6.2m people – **14**% of GB smartphone users

Who are they?
Likely to be 25-44 year olds and living in the South of England. Many work full time and have completed high school or postgrad degree.

Mindset
They're likely to take care of their health and wellbeing, making sure to exercise, enjoy good quality food and shell out on devices that make their lives easier. They rely on the internet but don't place much importance on TV, preferring to watch on-demand when it suits them

Relationship with news
They turn primarily to the internet for news and use a variety of news brands online. Radio is also important for news with this group.

Relationship with BBC
Above average listening to BBC Radio and moderate viewing of BBC One whilst BBC News is ranked number one site/app visited.

Demographics
Slight skew towards females, aged 25-44, with children in the home. They tend to be full time workers with higher than average income who have completed high school or attained a postgraduate degree.

Gender & Lifestage*

47% (male)
53% (female)

Hotel Parents	16%	143
Fledglings	15%	115
Playschool Parents	14%	134

Age

16-24	15%	91
25-34	24%	126
35-44	23%	135
45-54	10%	57
55-64	12%	88
65+	16%	101

News Journey

Web browser → Web browser → **News** → Web browser → Web browser
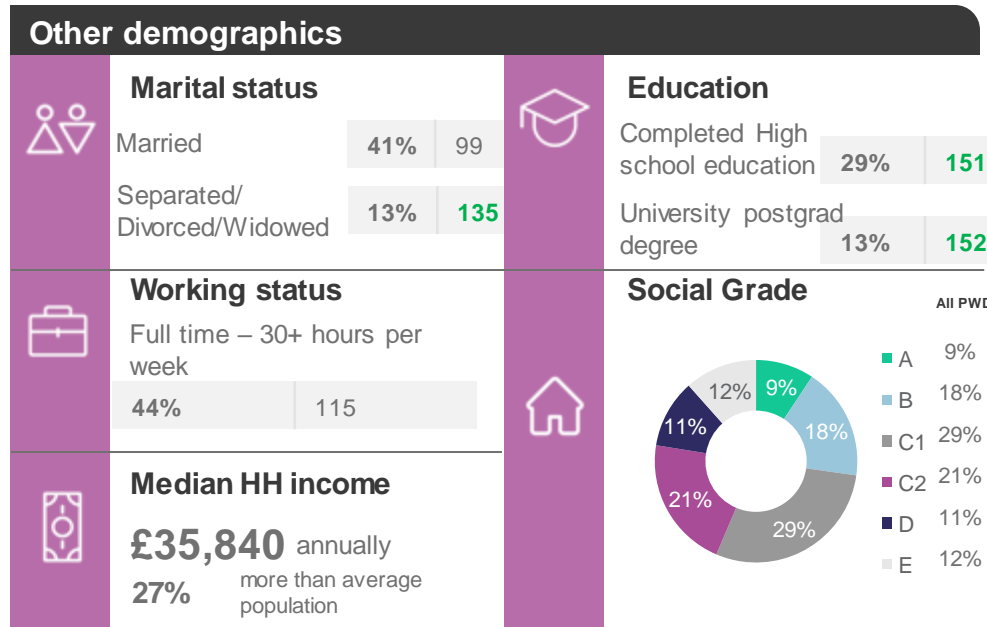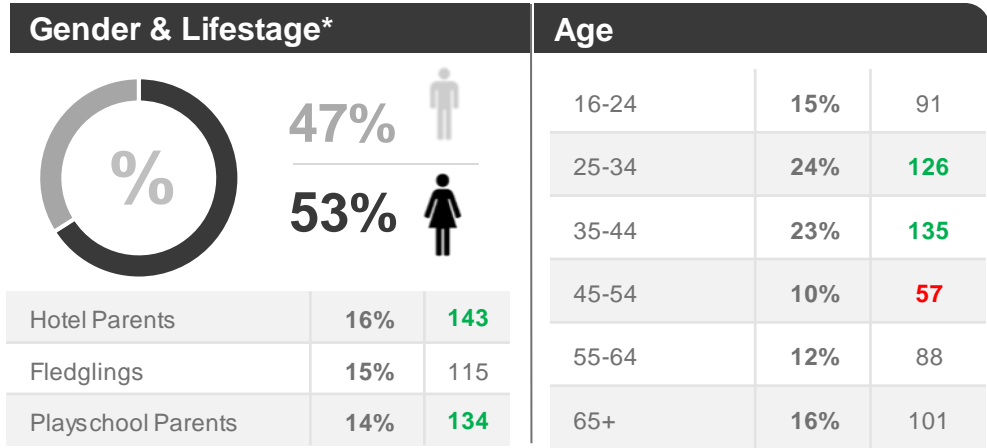
This is likely to be an incidental or goal driven news journey as a result of seeing information online.

They are likely to be browsing the web at night, using both app and web formats to consume small snippets of news.

Other demographics

Marital status
Married	41%	99
Separated/ Divorced/Widowed	13%	135

Working status
Full time – 30+ hours per week
44%	115

Median HH income
£35,840 annually
27% more than average population

Education
Completed High school education	29%	151
University postgrad degree	13%	152

Social Grade

All PWD
A	9%
B	18%
C1	29%
C2	21%
D	11%
E	12%

(donut: 9%, 18%, 29%, 21%, 11%, 12%)

Geographic region

17%	120
London	
13%	140
South West	
11%	121
East of England	

KANTAR

Lifestyle attitudes

This group are likely to appreciate the finer things in life, good quality wine and beer, staying fit and paying extra to make things easier. Many are career driven, quick to make decisions and clever when it comes to investing. Some in this group care what others think about them and take their opinions on board when it comes to purchase decisions.

Most discriminating attitudinal statements (Any Agree) – Top 15*

Statement	%	Index
I do some form of sport or exercise at least once a week	64%	122
I look on the work I do as a career rather than just a job	57%	152
I am prepared to pay more for products that make life easier	57%	120
It's worth paying extra for good quality beer	56%	131
I am prepared to pay more for good quality wine	52%	148
Because of my busy lifestyle, I don't take care of myself as well as I should	50%	129
I tend to make decisions quickly, based on 'gut feeling'	50%	123
I look for profitable ways to invest my money	48%	124
It is important my household is equipped with the latest technology	47%	132
I really enjoy a night out at the pub	47%	121
To me, being beautiful means asserting my personality, my difference	44%	137
I ask people for advice before buying new things	43%	124
I don't normally eat between meals	39%	128
People's opinion on my appearance is very important to me	37%	124
I worry about work during my leisure time	36%	128

KANTAR

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

Info-Led: Web Browser, Web Browser Dominant

Media preferences

This group are less likely to be heavy readers of newspapers and magazines, however when engaging with these media they turn to food and cooking articles. They prefer to watch films and soaps on TV and select action adventure or horror films in the cinema.

Media Frequencies (Heavy users)
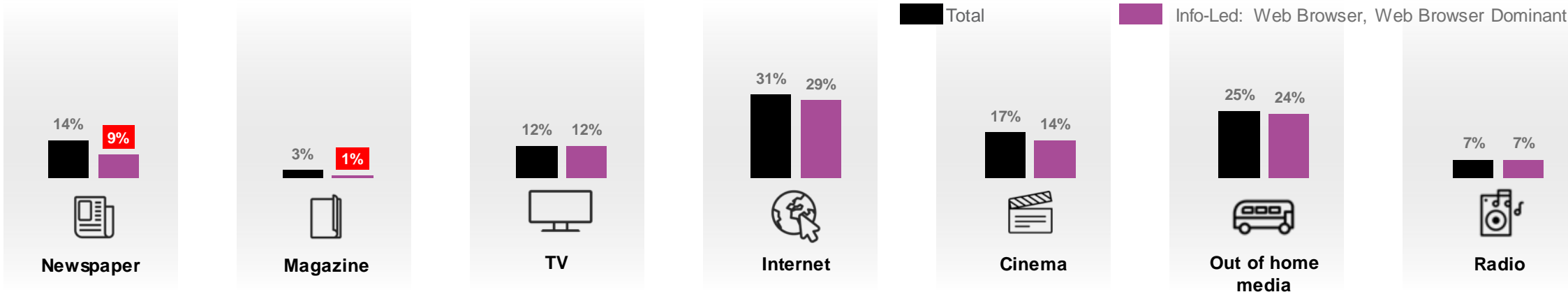
■ Total   ■ Info-Led: Web Browser, Web Browser Dominant

Media type ▶

Media type	Total	Info-Led
Newspaper	14%	9%
Magazine	3%	1%
TV	12%	12%
Internet	31%	29%
Cinema	17%	14%
Out of home media	25%	24%
Radio	7%	7%

Most differentiating media

Note: Media preferences ranked on index vs universe then on penetration (%)

Newspaper	%	Index
Food and Drink	22%	193
Weather	21%	133

Magazine	%	Index
Cooking/Recipes	21%	167
Science and Technology	16%	179

TV	%	Index
Films	45%	110
Soaps	27%	110

Internet	%	Index
Music	27%	134
Food	26%	128

Cinema	%	Index
Action Adventure	13%	111
Horror	10%	145

OOH	%	Index
On the side of a bus	44%	109
Outside supermarkets	28%	109

Radio	%	Index
News/Current Affairs	38%	152
Weather/Traffic	29%	120

Newspapers: Topics of interest **/ Magazines:** Topics of interest **/ TV:** Types of programmes they watch **/ Internet:** Use for topics **/ Cinema:** Type of movie **/ OOH:** Advertising Seen In Past Week **/ Radio:** Type of radio show listened to

KANTAR

Above average: Index > 120   Below average: Index < 80

Media attitudes

Most in this group rely on the internet and their mobile phone. They don't rate the quality of live TV stations, with many preferring to create their our schedule using on demand services. Watching TV inspires some to take up new interests or search for products they've seen.

Most discriminating media statements (Any Agree) – Top 15*

Statement	%	Index
I feel lost without my mobile phone	75%	**120**
I couldn't live without the internet on my mobile phone	72%	118
I think people rely too much on TV for relaxation	69%	**121**
Online TV streaming services have changed the way I watch television	58%	117
I am constantly looking to see if I have a message or e-mail on my mobile	57%	118
The growth in stations is diluting the quality of television	52%	**122**
I use 'on demand' TV Services to create my own TV schedule	50%	116
I trust the Cloud to keep my data secure	49%	118
I read printed magazines less now that they are available online	44%	**132**
Addressed mail can positively influence my opinion of a company or brand	42%	116
I set aside specific time to look through the mail I receive	39%	116
TV often inspires me to take up new interests	34%	**122**
I listen to the radio mainly for companionship	33%	116
Whilst watching TV, I search on the internet for products I see advertised	33%	**122**
I tend to remember companies who send me mail	29%	117

KANTAR

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: All smartphone users; Info-Led: Web Browser, Web Browser Dominant (n=145)

BBC consumption

The Web Browser group are more frequent listeners of BBC radio compared with the average population, favouring Radio 4 and the BBC World Service. Viewing of BBC one is broadly in line with the average and nature shows such as Countryfile and Springwatch top the list when it comes to BBC programmes they're more likely to choose.

Frequency of watching BBC One
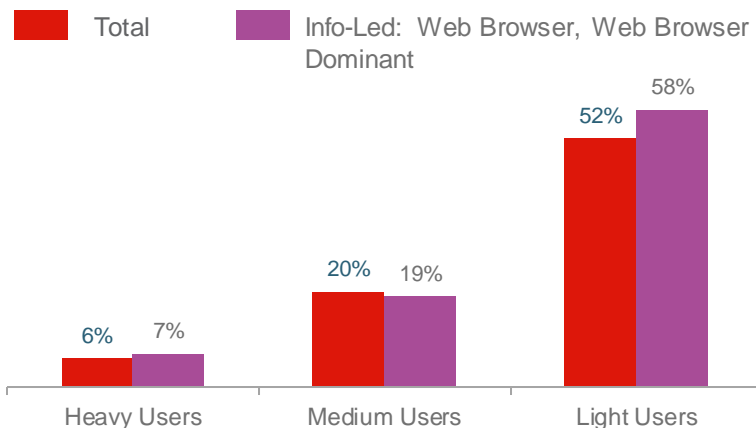
Legend: ■ Total ■ Info-Led: Web Browser, Web Browser Dominant

	Heavy Users	Medium Users	Light Users
Total	6%	20%	52%
Info-Led	7%	19%	58%

Frequency of listening to BBC Radio

Legend: ■ Total ■ Info-Led: Web Browser, Web Browser Dominant

	Heavy Users	Medium Users	Light Users
Total	6%	14%	16%
Info-Led	12%	20%	10%
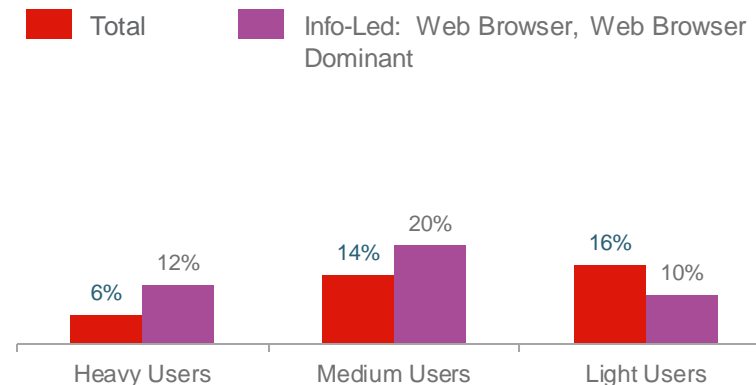
BBC Channels watched (last week)

BBC One	**67%**	102
BBC Two	**40%**	96
BBC Four	**13%**	**72**

BBC iPlayer usage

TV set	**36%**	110
Mobile Phone/Tablet/Other Mobile Device	**21%**	**182**
Desktop/laptop	**16%**	104

BBC Radio listened to (last week)

Radio 4	**24%**	**155**
Radio 1	**23%**	109
BBC World Service	**11%**	**182**

BBC TV Programmes specially choose to watch

Countryfile	**16%**	**124**
Springwatch	**14%**	**165**
The One Show	**12%**	**169**
Horizon	**12%**	**143**
Poldark	**4%**	**160**

Above average: Index > 120 **Below average: Index < 80**

KANTAR

INFO-LED | News Grouping

'The Who'

- Skew towards males, aged 25-34, full-time workers with above average income and higher social grade.

- Tend to be considerate, passionate about inclusion and careful not to make hasty decisions.

- 81% consume news/current affairs content on the internet (ix: 136)

- 55% listen to news/current affairs on the radio (ix: 143)

- Above average listening to BBC Radio and moderate viewing of BBC One whilst BBC News is ranked number one site/app visited

2.3m

5% of GB
smartphone adults

Info-Led: News Grouping

2.3m people – **5**% of GB smartphone users

Who are they?
Men aged 25-34 who are spread out across the country. They are educated, ABC1 individuals who fall into the Fledglings lifestage.

Mindset
These individuals are more likely to be considerate, passionate about inclusion and careful not to make hasty decisions. Some feel overwhelmed by advertising and are influenced by the TV they watch.

Relationship with news
Internet and radio are key media for news consumption.

Relationship with BBC
Above average listening to BBC Radio and moderate viewing of BBC One whilst BBC News is ranked number one site/app visited.

Demographics
Skew towards males, aged 25-34, full-time workers with above average income and higher social grade. They are located across the country, either living at home with parents (if aged under 35 years) or by themselves (if aged 55+).

Gender & Lifestage*

57% (male)

43% (female)
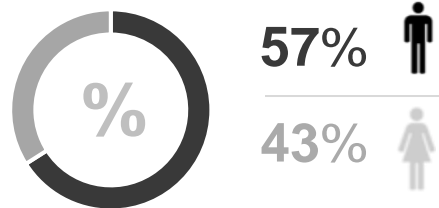
Fledglings	16%	122
Senior Sole Decision Makers	13%	215
Hotel Parents	12%	106

Age

16-24	8%	50
25-34	26%	139
35-44	13%	79
45-54	20%	110
55-64	15%	107
65+	17%	109

News Journey

News → Web browser → News-Multi

They are heavily engaged with the few news sources that they trust.

They may react to a notification or topic which leads them to read about that new story in more depth.

Other demographics

Marital status
Married	50%	118
Divorced	15%	201

Working status
Full time – 30+ hours per week
57%	148

Median HH income
£36,867 annually
30% more than average population

Education
University undergraduate degree e.g. Bachelor's
39%	151

Social Grade
All PWD

A	20%
B	21%
C1	26%
C2	20%
D	4%
E	9%

Geographic region

23%	**257**	South West
14%	**156**	East of England
13%	**142**	Scotland

Above average: Index > 120 Below average: Index < 80

KANTAR

Info-Led: News Grouping

Lifestyle attitudes

These individuals are likely to be considerate when it comes to other people's beliefs and their own health. Many don't make hasty purchases or decisions, preferring to weigh up their options in a calculated way. This group tend to be more risk adverse and level headed.

Most discriminating attitudinal statements (Any Agree) – Top 15*

Statement	%	Index
I check a number of sources before making a significant purchase	94%	125
It is important to respect traditional customs and beliefs	92%	124
To stay healthy, it is important to exercise regularly	92%	121
Beauty comes from within	91%	131
Before making any big outlay, I think about it for a while	88%	120
I don't like to judge other people on the way they choose to live their life	87%	122
I would be willing to volunteer my time for a good cause	86%	138
I am worried about pollution and congestion caused by cars	80%	134
In a job, security is more important than money	79%	158
Supermarket brand products are of an equal quality to big brand products	79%	124
Most of my drinking is done at home	77%	168
I welcome the National Lottery's contribution to charitable causes	76%	123
Children should be allowed to express themselves freely	75%	121
I always discuss major decisions with my partner	74%	124
Companies tend to over claim their green credentials	72%	140

KANTAR

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: All smartphone users; Info-Led: News Grouping (n=50)
Note: Small sample size, margins of error may be relatively large

Info-Led: News Grouping

Media preferences

Compared to the average Smartphone user, these news consumers are heavy users of the internet, radio, and newspapers everyday and are exposed to a lot of out of home media. Politics feature in both their internet searches and topic of choice of magazines.

Media Frequencies (Heavy users)
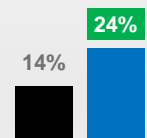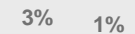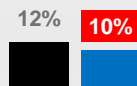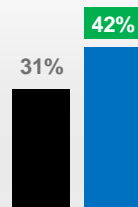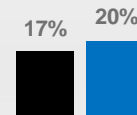
Legend: ■ Total ■ Info-Led: News Grouping

Media type ▶

Media type	Total	Info-Led: News Grouping
Newspaper	14%	24%
Magazine	3%	1%
TV	12%	10%
Internet	31%	42%
Cinema	17%	20%
Out of home media	25%	34%
Radio	7%	16%
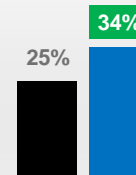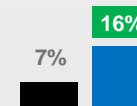
Most differentiating media

Note: Media preferences ranked on index vs universe then on penetration (%)

Newspaper
	%	Index
National News	56%	159
European News	35%	217

Magazine
	%	Index
Science and Technology	22%	244
Politics	21%	224

TV
	%	Index
Documentaries	42%	154
Comedy	32%	126

Internet
	%	Index
Finance and the economy	30%	228
Politics	29%	202

Cinema
	%	Index
Action Adventure	15%	126
Superhero	13%	122

Out of home media
	%	Index
Advertising in supermarkets	44%	133
At railway stations/platforms	33%	229

Radio
	%	Index
News/Current Affairs	43%	172
Weather/Traffic	33%	139

Newspapers: Topics of interest **/ Magazines:** Topics of interest **/ TV:** Types of programmes they watch **/ Internet:** Use for topics **/ Cinema:** Type of movie **/ OOH:** Advertising Seen In Past Week **/ Radio:** Type of radio show listened to

Above average: Index > 120 Below average: Index < 80

Media attitudes

Some of this segment take pleasure in reading newspapers, with some using them to stay up to date and willing to pay to access digital newspaper and magazine content. Many feel harassed advertising and find adverts on social media intrusive. Despite this, many do like to get to the cinema on time to watch the adverts. Some find TV a source of inspiration when it comes to practical tips and taking up new interests.

Most discriminating media statements (Any Agree) – Top 15*

Statement	%	Index
I couldn't live without the internet on my mobile phone	75%	122
I find advertising on social media intrusive	71%	121
I feel bombarded by advertising	67%	121
I always listen to the radio more intently when the news comes on	63%	136
I enjoy seeing films at the cinema more than on TV	59%	138
I often notice products or brands that appear in TV programmes and films	54%	153
I get to the cinema on time to watch the adverts and trailers	46%	132
I enjoy reading newspapers most days	44%	155
Well designed poster sites improve the urban landscape	40%	135
I read the financial pages of my newspaper	40%	200
TV often inspires me to take up new interests	38%	137
I rely on newspapers to keep me informed	33%	136
TV programmes give me practical tips on how to live my life	28%	124
I would be willing to pay to access content on newspaper websites	20%	163
I would be willing to pay to access content on magazine websites	13%	131

KANTAR

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: All smartphone users; Info-Led: News Grouping (n=50)
Note: Small sample size, margins of error may be relatively large

Info-Led: News Grouping

BBC consumption

These news consumers are more likely to be heavy listeners of BBC Radio with above average representation of heavy BBC One users (though the majority are light users). Likely to view BBC Two and likely to listen to a range of BBC radio stations when compared to the average. They are likely to seek out news programmes when watching BBC.

Frequency of watching BBC One
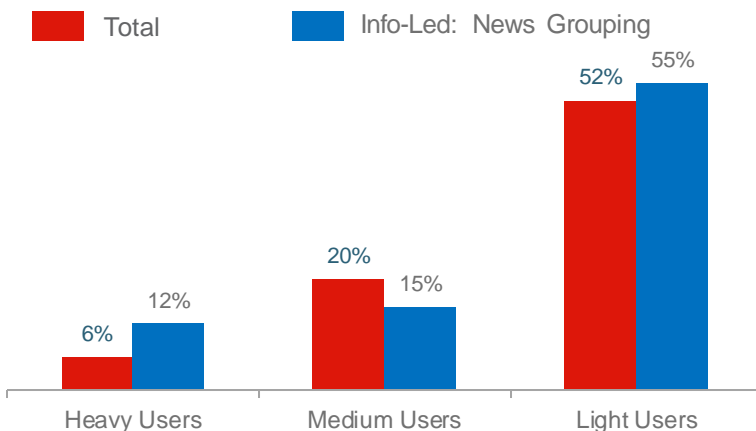
Legend: **Total** | **Info-Led: News Grouping**

	Heavy Users	Medium Users	Light Users
Total	6%	20%	52%
Info-Led: News Grouping	12%	15%	55%

Frequency of listening to BBC Radio

Legend: **Total** | **Info-Led: News Grouping**

	Heavy Users	Medium Users	Light Users
Total	6%	14%	16%
Info-Led: News Grouping	19%	11%	15%
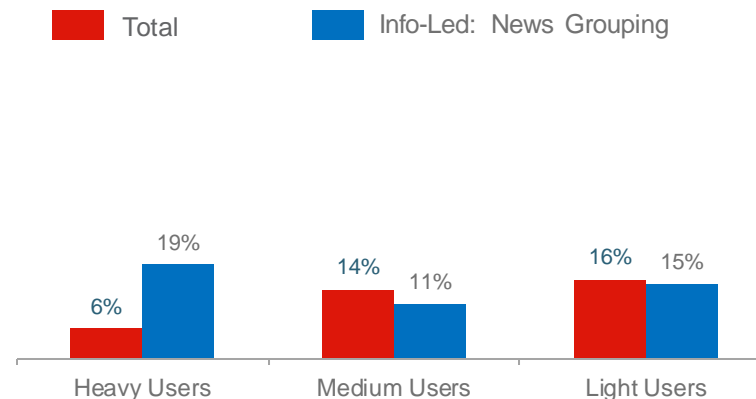
BBC Channels watched (last week)

BBC One	**75%**	114
BBC Two	**55%**	132
BBC Four	**18%**	98

BBC iPlayer usage

TV set	**43%**	129
Mobile Phone/Tablet/Other Mobile Device	**35%**	297
Desktop/laptop	**25%**	163

BBC Radio listened to (last week)

Radio 4	**36%**	239
Radio 2	**34%**	141
Radio 3	**10%**	189

BBC TV Programmes specially choose to watch

BBC Ten O'clock News	**42%**	207
BBC Six O'clock News	**31%**	141
Doctor Who	**30%**	146
BBC One O'clock News	**29%**	257
Horizon	**29%**	344

Above average: Index > 120   Below average: Index < 80

KANTAR

INFO-LED | Search

'The Who'

- Skew towards retired men who are married and have grown up children. They are likely to be university educated and reside in either Wales or the far North.

- This segment are likely to be financially savvy and responsible, looking out for utility savings and profitable investments.

- 71% consume news/current affairs content on the internet (ix: 120)

- 54% listen to news/current affairs on the radio (ix: 140)

- Likely to be moderate BBC Radio listeners and moderate BBC One viewers whilst BBC News is ranked number one site/app visited

4m

9% of GB smartphone adults
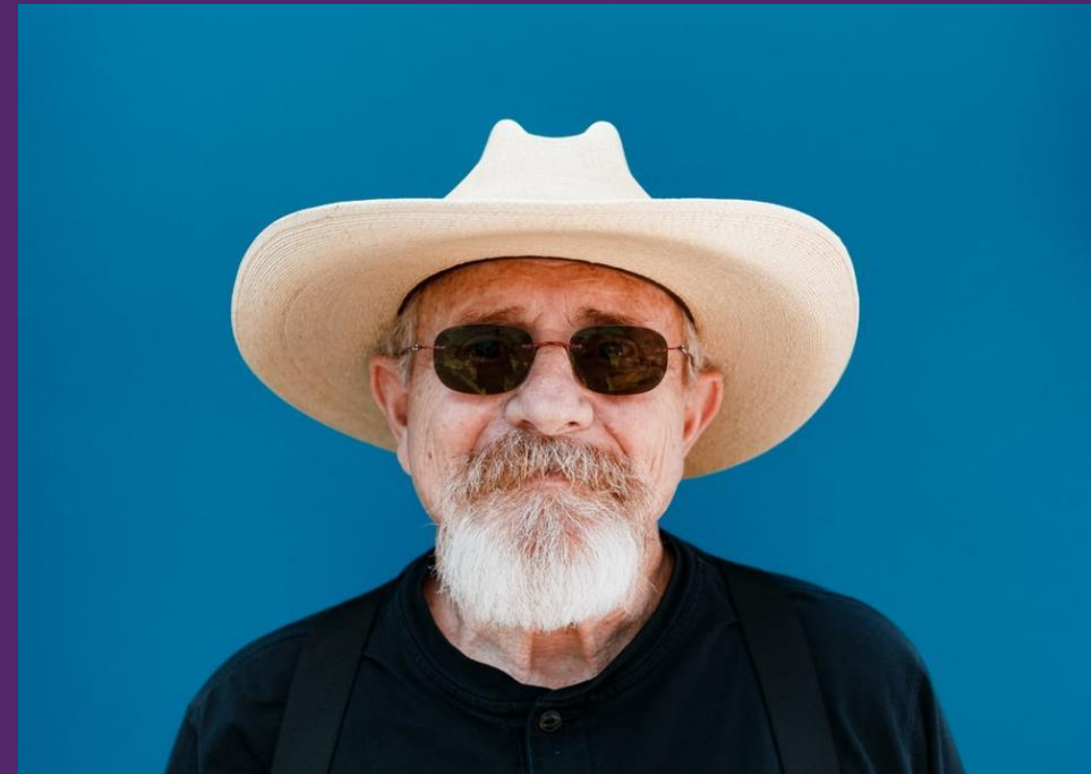
Info-Led: Search

4m people – **9**% of GB smartphone users

Who are they?
Men aged 65+ who are more likely to live in Wales and the North. They are social grade B and C1, retired Empty Nesters who are married.

Mindset
Many are financially confident and responsible with their retirement pot. They often have an active social life but balance this with a healthy diet and sport.

Relationship with news
They get their news in snippets from many sources. Once they've consumed news their news journey ends.

Relationship with BBC
This group are light watchers of BBC One and medium listeners of BBC Radio, favouring Radio 4 and 2.

Demographics

Skew towards retired men who are married and have grown up children. They are likely to be university educated and reside in either Wales or the far North.

Gender & Lifestage*

59% (male)
41% (female)
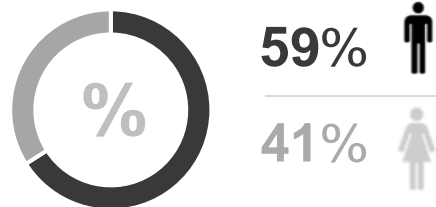
Empty Nesters	27%	191
Hotel Parents	13%	116
Secondary School Parents	11%	113

Age

16-24	11%	71
25-34	16%	84
35-44	16%	95
45-54	19%	105
55-64	10%	74
65+	27%	171

Other demographics

Marital status
Married
59% — 140

Working status
Full-time
32% — 85
Retired
18% — 110

Median HH income
£29,673 annually
5% more than average population

Education
University degree e.g. Bachelor's/Master's
39% — 113

Social Grade

All PWD

A	9%
B	23%
C1	33%
C2	12%
D	12%
E	11%

News Journey

Search → Web browser → News
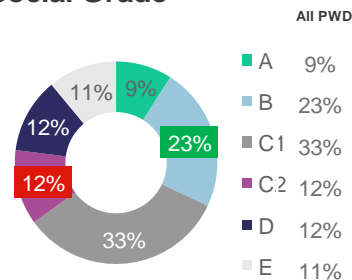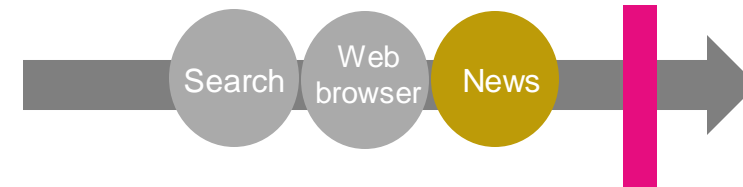
They have short journeys with news as the last step, suggesting a goal-driven consumption.

Their search is specific and once they've found the article they find relevant, they read it briefly before ending the session.

Geographic region

1	14%	287	Wales
2	11%	218	North East
3	19%	212	Scotland

Above average: Index > 120   Below average: Index < 80

Lifestyle attitudes

This segment are more likely to be financially savvy and responsible, looking out for utility savings and profitable investments. Many say they tend to lead a healthy social life, entertaining guests at home as well as splashing out on meals and good quality beer. To keep the balance, some take care to maintain a healthy diet and partake in sport.

Most discriminating attitudinal statements (Any Agree) – Top 15*

Statement	%	Index
Financial security after retirement is your own responsibility	77%	126
Switching utility suppliers is well worth the effort	76%	130
Companies tend to over claim their green credentials	63%	122
It is important to me to look well dressed	62%	123
I enjoy splashing out on a meal in a restaurant	62%	123
I enjoy entertaining people at home	59%	123
I consider my diet to be very healthy	54%	140
It's worth paying extra for good quality beer	54%	125
Sport is mainly about having fun, rather than a form of exercise	53%	123
I look for profitable ways to invest my money	50%	131
I would be prepared to pay more for environmentally friendly products	49%	124
The economic outlook heavily affects my purchasing behaviour	49%	146
I am prepared to pay more for good quality wine	48%	137
Supermarkets and retailers should not get involved in personal finance	48%	121
I ask people for advice before buying new things	46%	135

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: All smartphone users; Info-Led: Search (n=79)
Note: Small sample size, margins of error may be relatively large

Info-Led: Search

Media preferences

Compared to the average person, this group aren't heavy users of the internet or the cinema. This segment get their news from a variety of sources including Newspapers, Magazines, TV and Radio.

Media Frequencies (Heavy users)
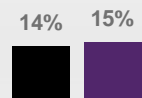
■ Total ■ Info-Led: Search

Media type ▶

Media type	Total	Info-Led: Search
Newspaper	14%	15%
Magazine	3%	2%
TV	12%	11%
Internet	31%	22%
Cinema	17%	13%
Out of home media	25%	25%
Radio	7%	7%
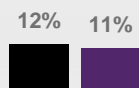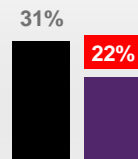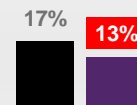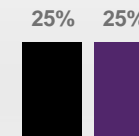
Most differentiating media

Note: Media preferences ranked on index vs universe then on penetration (%)

Newspaper		
National News	52%	**149**
Local News	38%	**160**

Magazine		
National News	22%	**146**
Science & Technology	20%	**220**

TV		
News/current affairs	39%	112
Documentaries	30%	111

Internet		
Technology	27%	**173**
Food	25%	**124**

Cinema		
Period Drama	4%	**152**
Superhero	9%	84

Out of home		
On the side of a bus	60%	**147**
On a bus stop/shelter	54%	**148**

Radio		
News/Current Affairs	40%	**160**
Sports	25%	**138**

Newspapers: Topics of interest **/ Magazines:** Topics of interest **/ TV:** Types of programmes they watch **/ Internet:** Use for topics **/ Cinema:** Type of movie **/ OOH:** Advertising Seen In Past Week **/ Radio:** Type of radio show listened to

KANTAR

Above average: Index > 120 Below average: Index < 80

Media attitudes

This group are likely to distrust the volume of advertising across TV and social media and believe the choice of TV channels is diluting the quality. Despite this, some are open to addressed mail and take notes of brands who contact them in this way. Some members of this group are loyal to local newspapers and radio stations as they appreciate keeping up to date with local news.

Most discriminating media statements (Any Agree) – Top 15*

Statement	%	Index
I couldn't live without the internet on my mobile phone	80%	131
I think people rely too much on TV for relaxation	70%	124
I find advertising on social media intrusive	66%	112
I always listen to the radio more intently when the news comes on	63%	134
I find advertising a waste of my time	55%	131
The growth in stations is diluting the quality of television	55%	128
I think quite a lot of TV advertising is devious	53%	111
I read printed magazines less now that they are available online	50%	151
I set aside specific time to look through the mail I receive	44%	132
I value the local paper because it covers local news	42%	115
Addressed mail can positively influence my opinion of a company or brand	41%	113
I prefer local radio because it covers local news	33%	111
I would not change the newspaper I read	32%	115
I tend to remember companies who send me mail	31%	124
Whilst watching TV, I search on the internet for products I see advertised	31%	117

KANTAR

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

BBC consumption

Medium listeners of BBC Radio and medium viewers of BBC one are over represented in this group when compared to the average. These news journey consumers are more likely to use their TV set to watch iPlayer and choose to watch entertainment programmes.

Frequency of watching BBC One
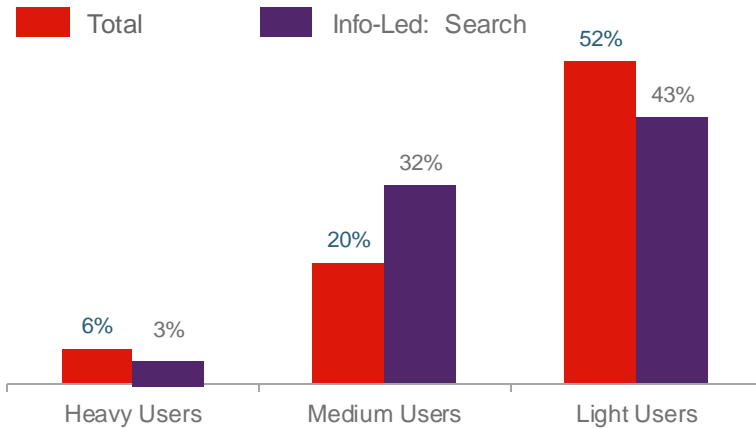
Legend: ■ Total ■ Info-Led: Search

User Type	Total	Info-Led: Search
Heavy Users	6%	3%
Medium Users	20%	32%
Light Users	52%	43%

Frequency of listening to BBC Radio

Legend: ■ Total ■ Info-Led: Search

User Type	Total	Info-Led: Search
Heavy Users	6%	5%
Medium Users	14%	25%
Light Users	16%	14%
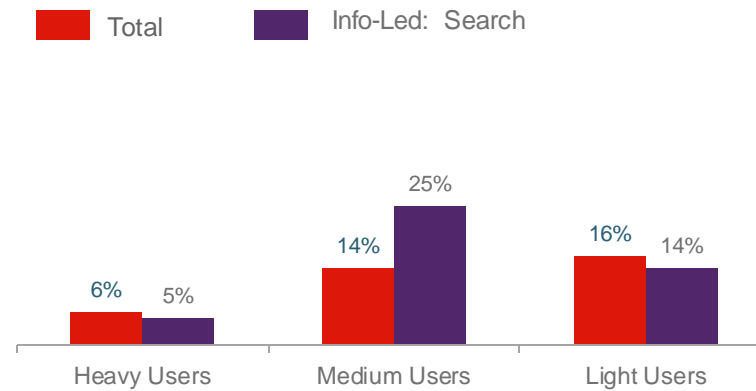
BBC Channels watched (last week)

Channel		
BBC One	**69%**	106
BBC Two	**34%**	82
BBC Four	**16%**	89

BBC iPlayer usage

Device		
TV set	**52%**	**156**
Mobile Phone/Tablet/Other Mobile Device	**13%**	110
Console (e.g. Xbox, PlayStation)	**5%**	97

BBC Radio (last week)

Station		
Radio 2	**26%**	108
Radio 1	**25%**	117
Radio 4	**21%**	**137**

BBC TV Programmes specially choose to watch

Programme		
2018 FIFA World Cup	**33%**	**140**
Mrs Brown's Boys	**30%**	**151**
Breakfast on BBC1	**27%**	**165**
The Apprentice	**24%**	**122**
Top Gear	**21%**	**181**

KANTAR

Above average: Index > 120 Below average: Index < 80

SOCIAL | Instant Messenger

'The Who'

- Skew towards young, single, ABC1 women. They are spread out across the East of the country, from Yorkshire to the South East. They are likely to be in full time education, though many have now entered the workforce

- They could be perceived as "feeling the weight of the world on their shoulders". They are more likely to be concerned about the effects of pollution and congestion and how they are perceived

- 55% consume news/current affairs content on the internet (ix: 92)

- 38% Use social networking sites for news/current affairs (ix: 116)

- Low engagement with news though BBC News top news app visited. Light engagement with the BBC's other media channels

2.8m
6% of GB
smartphone adults

Social: Instant Messenger

2.8m people – 6% of GB smartphone users

Who are they?
Women aged 16-34 who are social grade BC1 and are spread out across the country. They are likely to be in full time education, though many have now entered the workforce.

Mindset
It could be said that they feel the weight of the world on their shoulders. They are likely to be concerned about how they are perceived and the effects of pollution and congestion.

Relationship with news
They have a short attention span when it comes to reading news articles, switching to social media once they have consumed news.

Relationship with BBC
Not a strong relationship with the BBC but they tune in for the reality shows. They overindex when it comes to watching iPlayer on mobile.

Demographics

Skew towards young, single, BC1 women. They are spread across the East of the country, from Yorkshire to the South East. Some are still in education.

Gender & Lifestage*

42% (male)
58% (female)
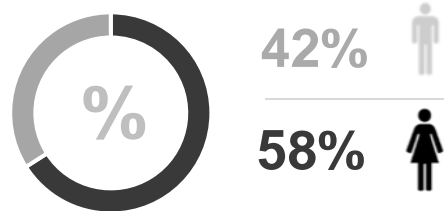
Fledglings	26%	195
Nest Builders	12%	234
Flown The Nest	10%	171

Age

16-24	32%	200
25-34	29%	155
35-44	13%	74
45-54	13%	72
55-64	13%	93
65+	0%	0

Other demographics

Marital status
Single

48%	160

Working status
Full-time – 30+ Hours Per Week

41%	107

Full-time student/at school

16%	178

Median HH income

£30,987 annually
9% more than average population

Education
Further qualification (between high school & university)

20%	122

Social Grade

	All PWD
A	5%
B	23%
C1	47%
C2	16%
D	3%
E	5%

(chart values: 5%, 3%, 5%, 16%, 23%, 47%)

News Journey

News → IM → IM
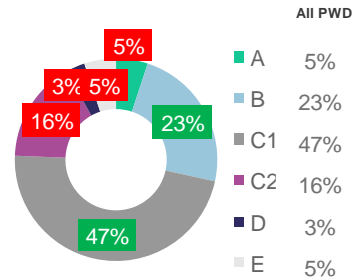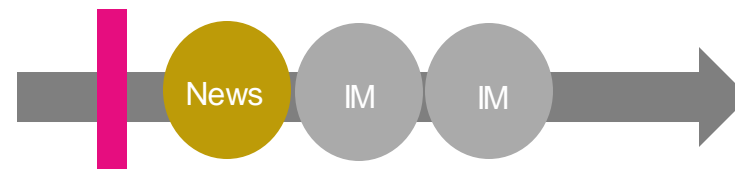
They start their journey on news before switching to messaging services, indicating low engagement.

Their journey could begin with receiving a notification from a news aggregator app which they respond to before moving onto social media services such as Snapchat.

Geographic region

1	23%	161 — South East
2	16%	198 — Yorkshire and The Humber
3	12%	132 — East of England

Above average: Index > 120 Below average: Index < 80

KANTAR

Lifestyle attitudes

The Social IM group are more likely to be worried about how they are perceived and as a result they can place quite a bit of value on the quality of their appearance and lifestyle. Compared to others, they tend to take great care when it comes to their home, preferring minimalistic, tidy and up to date décor.

Most discriminating attitudinal statements (Any Agree) – Top 15*

Statement	%	Index
I am worried about pollution and congestion caused by cars	74%	125
I should make an effort to read more books	74%	133
I like simple décor with minimal furniture and clutter	68%	123
I worry a lot about myself	67%	161
It is important to me to look well dressed	63%	125
I can't bear untidiness	62%	125
Product reviews have a major influence on my purchasing decisions	61%	123
I'm always looking for new ideas to improve my home	61%	123
Beauty/styling products help me feel good about myself	59%	131
It's important my family thinks I'm doing well	55%	128
Because of my busy lifestyle, I don't take care of myself as well as I should	53%	136
I love anything new	52%	126
I am not interested in what goes on under the bonnet of a car	52%	123
I like taking risks	51%	146
It is important to be attractive to others	50%	132

KANTAR

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

Media preferences

The social IM group underindex when it comes to reading newspapers and magazines, listening to the radio and exposure to out of home media. They are more likely to catch up on sports news on TV and also chose to listen to sports on the radio (when engaging with that platform) and read magazines about sports.

Media Frequencies (Heavy users)
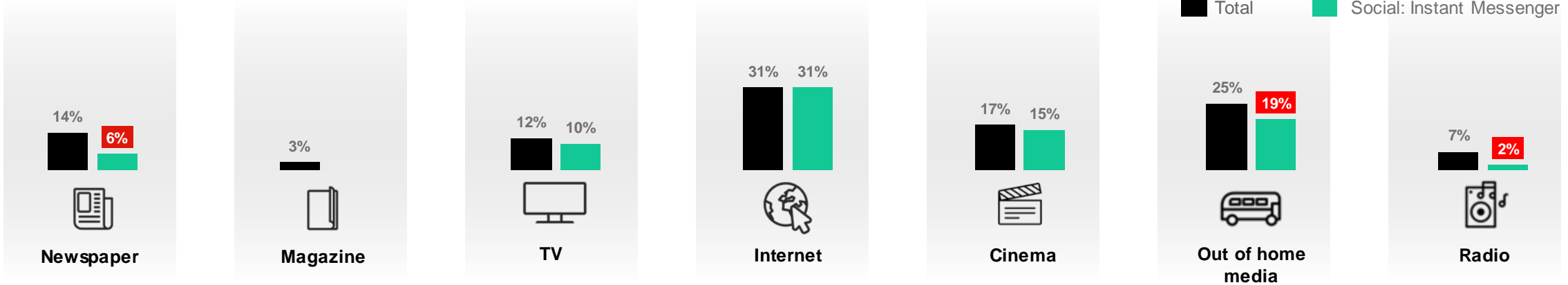
	Total	Social: Instant Messenger

Media type ▶

Newspaper	Magazine	TV	Internet	Cinema	Out of home media	Radio
14% / 6%	3%	12% / 10%	31% / 31%	17% / 15%	25% / 19%	7% / 2%

Most differentiating media

Note: Media preferences ranked on index vs universe then on penetration (%)

Newspaper		
Politics	19%	126
Film & Video	14%	108

Magazine		
Sports	12%	106
Politics	10%	106

TV		
Reality TV	28%	179
Sports News	22%	128

Internet		
Cinema and films	23%	117
Food	22%	110

Cinema		
Comedy	17%	131
Superhero	13%	118

Out of home		
In convenience shops/stores	14%	120
In clubs or pubs	10%	124

Radio		
Sports	14%	76
News/Current Affairs	16%	63

Newspapers: Topics of interest **/ Magazines:** Topics of interest **/ TV:** Types of programmes they watch **/ Internet:** Use for topics **/ Cinema:** Type of movie **/ OOH:** Advertising Seen In Past Week **/ Radio:** Type of radio show listened to

Above average: Index > 120 Below average: Index < 80

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: All smartphone users; Social: Instant Messenger (n=80)
Note: Small sample size, margins of error may be relatively large

KANTAR

Media attitudes

As the name suggests, most of this segment depend on the internet and social media and often find themselves checking for messages. For many, watching TV is a favourite pastime, however some tend to prefer to curate their own viewing schedule, using on-demand services, recording programmes or streaming online.

Most discriminating media statements (Any Agree) – Top 15*

Statement	%	Index
I couldn't live without the internet on my mobile phone	71%	115
I am constantly looking to see if I have a message or e-mail on my mobile	68%	141
I feel the need to check social networking sites every day	67%	131
I always choose not to have my name included on mailing lists	57%	123
I save up programmes I've recorded or downloaded and watch them back to back	57%	125
I use 'on demand' TV Services to create my own TV schedule	55%	126
I enjoy seeing films at the cinema more than on TV	53%	122
Watching TV is my favourite pastime	49%	126
I find advertising a waste of my time	49%	116
Because of online TV streaming I now watch more television than I used to	41%	129
I like to follow on social media the magazines/newspapers that I read	36%	155
Well designed poster sites improve the urban landscape	34%	115
I am a TV addict	33%	122
I like to interact with advertising on touch screens in shopping centres, cinemas, airports etc.	28%	138
I prefer to watch TV on a laptop, tablet or mobile	27%	156

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: All smartphone users; Social: Instant Messenger (n=80)
Note: Small sample size, margins of error may be relatively large

Social: Instant Messenger

BBC consumption

They tend to be light watchers of BBC One and have lower than average interest in the other BBC Channels too. For some, their programmes of choice include reality shows such as The Apprentice and MasterChef. BBC iPlayer content is likely tuned in to on computer or mobile devices.

Frequency of watching BBC One
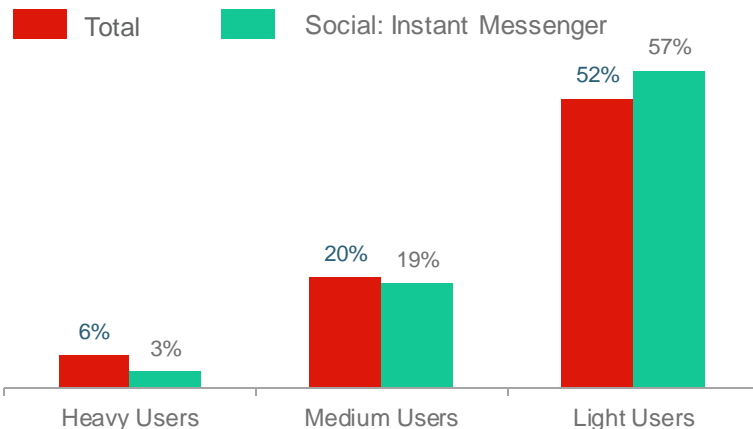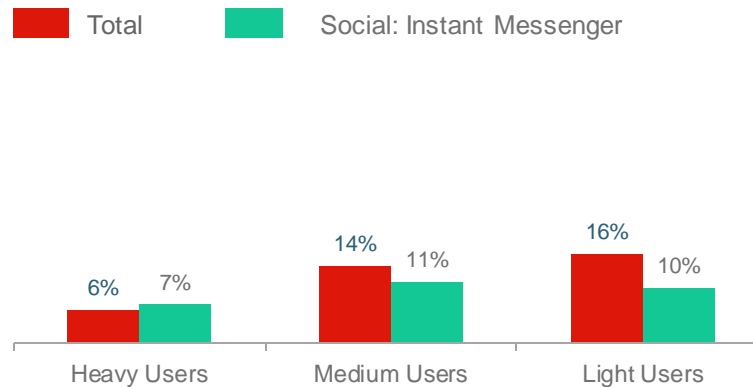
Legend: ■ Total   ■ Social: Instant Messenger

	Heavy Users	Medium Users	Light Users
Total	6%	20%	52%
Social: Instant Messenger	3%	19%	57%

Frequency of listening to BBC Radio

Legend: ■ Total   ■ Social: Instant Messenger

	Heavy Users	Medium Users	Light Users
Total	6%	14%	16%
Social: Instant Messenger	7%	11%	10%

BBC Channels watched (last week)

BBC One	**57%**	87
BBC Two	**26%**	62
BBC Four	**8%**	43

BBC iPlayer usage

TV set	**32%**	98
Desktop/laptop	**19%**	121
Mobile Phone/Tablet/Other Mobile Device	**17%**	140

BBC Radio (last week)

Radio 1	**24%**	114
Radio 2	**19%**	78
Radio 5 Live	**6%**	44

BBC TV Programmes specially choose to watch

The Apprentice	**35%**	**176**
Mrs Brown's Boys	**24%**	**120**
MasterChef	**19%**	116
Top Gear	**15%**	**131**
Doctor Foster	**14%**	**170**

Above average: Index > 120   Below average: Index < 80

SOCIAL | Social Media

'The Who'

- Women who are likely to have completed high school and are working full time. This group are likely to be single, Fledglings and social grade BC1.

- They like to use technology and services that make daily life easier. Many are interested in international events and some are outspoken about their views on current legislation.

- 75% consume news/current affairs content on the internet (ix: 127)

- 40% Use social networking sites for news/current affairs (ix: 124)

- This group don't have as strong a relationship with the BBC as other segments. They are light watchers of BBC One and Medium/Light listeners of BBC Radio

2.9m
6% of GB
smartphone adults

Social: Social Media

2.9m people – 6% of GB smartphone users

Who are they?
Women who are likely to have completed high school and are working full time. They are single, Fledglings and social grade BC1.

Mindset
They like to use technology and services that make daily life easier. Many are interested in international events and some are outspoken about their views on current legislation.

Relationship with news
Internet and social media are the dominant avenues for accessing news content, though newspapers are still strong.

Relationship with BBC
This group don't have as strong a relationship with the BBC as other segments. They are light watchers of BBC One and Medium/Light listeners of BBC Radio.

Demographics

Skew towards young, professional, BC1, women residing in the South. Many are university educated, though there is an above representation of individuals who have completed high school only. Many work full time and are single.

Gender & Lifestage*

45% (male)
55% (female)
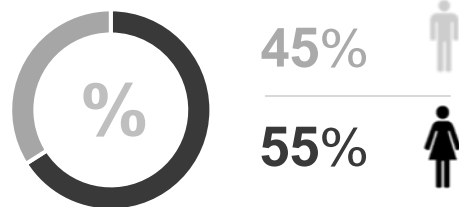
Fledglings	20%	155
Playschool Parents	14%	131
Flown the Nest	7%	126

Age

16-24	15%	91
25-34	37%	193
35-44	10%	58
45-54	10%	57
55-64	10%	70
65+	19%	117

News Journey

Social media → Web Browser → News

They start their journey into news through social media. They spend limited time on articles, suggesting they are incidentally consuming news.

They prefer web formats and may search directly in the browser for something they saw on social media.

Other demographics

Marital status
Single
41%   136

Working status
Full time – 30+ Hours Per Week
48%   126

Median HH income
£28,857 annually
2% more than average population

Education
Completed High School
25%   132
University degree (Bachelor's/Master's)
38%   112

Social Grade   All PWD

A	6%	
B	35%	
C1	31%	
C2	17%	
D	10%	
E	2%	

Geographic region

1	16%	177	South West
2	13%	144	East of England
3	10%	196	Wales

KANTAR

Lifestyle attitudes

Convenience is key for this Social Media group, with most seeking out technology and apps that make daily life easier. Many take an interest in international events and some have strong opinions on legislations such as smoking, drugs and a single European currency.

Most discriminating attitudinal statements (Any Agree) – Top 15*

Statement	%	Index
Convenience often plays a part in my purchase decisions	78%	122
I like to have technology that makes life easier at home	77%	120
I am interested in international events	74%	130
I am worried about pollution and congestion caused by cars	73%	124
I prefer using deodorants/shower gels to smell nice rather than perfumes	71%	130
I tend to always buy the same beauty products	71%	124
I think smoking e-cigarettes in public places should be banned	68%	135
Apps make my daily routine easier	66%	126
It's worth paying extra for good quality beer	53%	123
I look on the work I do as a career rather than just a job	51%	135
I really enjoy a night out at the pub	48%	124
Cannabis should be legalised	47%	123
A single European currency would be a good thing for Britain	32%	136
I don't have time to spend preparing and cooking food	28%	153
You can judge a person by the car they drive	28%	132

KANTAR

Above average: Index > 120 Below average: Index < 80

*Selected based on high level of agreement and high level of differentiation with the avg.
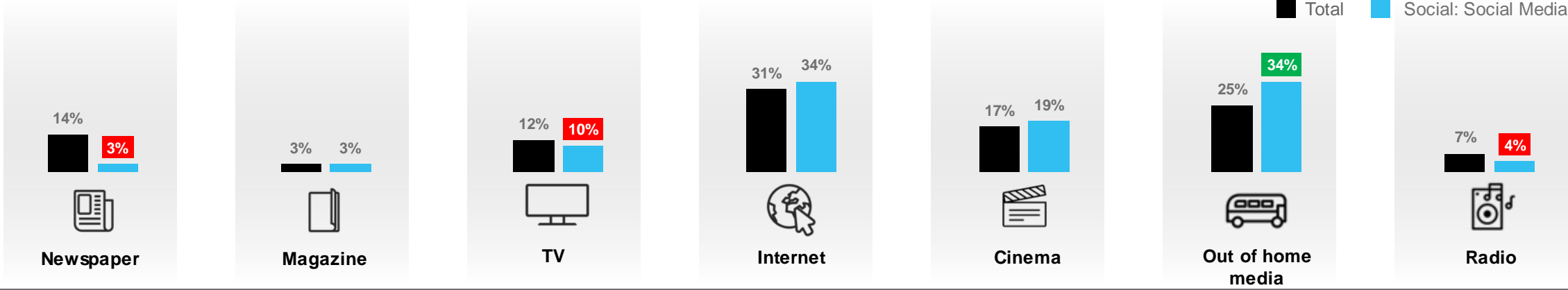
Media preferences

Some in this group enjoy live music, reality TV and engaging with politics, both online and in newspapers. They are much more likely to be exposed to out of home advertising, particularly on and around buses.

Media Frequencies (Heavy users)

Legend: ■ Total ■ Social: Social Media

Media type	Newspaper	Magazine	TV	Internet	Cinema	Out of home media	Radio
Total	14%	3%	12%	31%	17%	25%	7%
Social: Social Media	3%	3%	10%	34%	19%	34%	4%

Most differentiating media

Note: Media preferences ranked on index vs universe then on penetration (%)

Newspaper

	%	Index
Politics	29%	190
European News	30%	189
Sport	21%	191
National News	18%	123

TV

	%	Index
Serials	40%	119
Reality TV	19%	123

Internet

	%	Index
Politics	28%	196
Cinema and films	23%	118

Cinema

	%	Index
Action Adventure	18%	154
Drama excl. Period Drama	13%	323

Out of home media

	%	Index
On the side of a bus	45%	109
On a bus stop/shelter	41%	111

Radio

	%	Index
Live Concerts	16%	133
Live Bands In-Studio	13%	167

Newspapers: Topics of interest **/ Magazines:** Topics of interest **/ TV:** Types of programmes they watch **/ Internet:** Use for topics **/ Cinema:** Type of movie **/ OOH:** Advertising Seen In Past Week **/ Radio:** Type of radio show listened to

KANTAR

Above average: Index > 120   Below average: Index < 80

Media attitudes
Over half of this group check social media daily and cannot manage without the internet. Many are not open to TV advertising, nor communications via mailing lists. Some enjoy crafting their own TV schedule using on-demand and streaming services, however many still prefer to see films in the cinema.

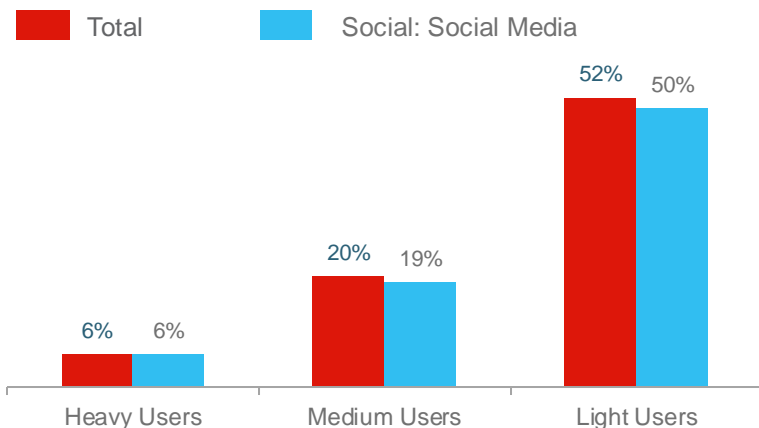**Most discriminating media statements (Any Agree) – Top 15***

Statement	%	Index
When I need information the first place I look is the internet	95%	105
In this day and age, I cannot manage without the internet	80%	105
I couldn't live without the internet on my mobile phone	79%	**129**
I feel lost without my mobile phone	66%	106
Nearly all TV advertising annoys me	64%	**124**
I feel the need to check social networking sites everyday	61%	**120**
Online TV streaming services have changed the way I watch television	59%	117
I read printed magazines less now that they are available online	56%	**168**
I think interactive TV services are a good idea	56%	**133**
I always listen to the radio more intently when the news comes on	53%	113
I am constantly looking to see if I have a message or e-mail on my mobile	51%	106
I always choose not to have my name included on mailing lists	50%	107
I enjoy seeing films at the cinema more than on TV	50%	116
I use 'on demand' TV Services to create my own TV schedule	49%	113
I trust the Cloud to keep my data secure	49%	117

KANTAR

Above average: Index > 120 Below average: Index < 80
*Selected based on high level of agreement and high level of differentiation with the avg.

Source: GB TGI Clickstream 2019 Q2 (Smartphone only)
Base: All smartphone users; Social: Social Media (n=68)
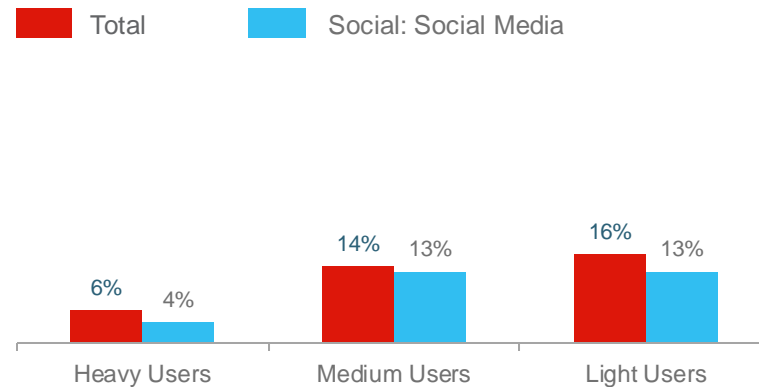Note: Small sample size, margins of error may be relatively large

BBC consumption

Frequency of watching BBC One and of listening to BBC Radio is broadly in line with the average smartphone user. Some in this group enjoy watching the news and talk shows on the BBC, and preferring BBC One over the other channels (though less than average). They overindex when it comes to listening to Radio 2 and using their Mobile/tablet to use iPlayer.

Frequency of watching BBC One

- **Total**
- **Social: Social Media**

	Heavy Users	Medium Users	Light Users
Total	6%	20%	52%
Social: Social Media	6%	19%	50%

Frequency of listening to BBC Radio

- **Total**
- **Social: Social Media**

	Heavy Users	Medium Users	Light Users
Total	6%	14%	16%
Social: Social Media	4%	13%	13%

BBC Channels watched (last week)

BBC One	**55%**	85
BBC Two	**41%**	97
BBC Four	**19%**	101

BBC iPlayer usage

TV set	**37%**	112
Mobile Phone/Tablet/Other Mobile Device	**24%**	**204**
Desktop/laptop	**18%**	114

BBC Radio listened to (last week)

Radio 2	**32%**	**134**
Radio 1	**19%**	88
Radio 4	**12%**	**79**

BBC TV Programmes specially choose to watch

Breakfast on BBC One	**27%**	**163**
The Graham Norton Show	**22%**	**137**
Newsnight	**18%**	**219**
Doctor Foster	**14%**	**162**
The One Show	**11%**	**145**

KANTAR

Above average: Index > 120 Below average: Index < 80