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Ways of Watching:
Categorising television viewers in an age of streaming

About the Research

Ways of Watching examines how and why television viewing habits have changed in the UK since the increased uptake of streaming services during 2020. It identifies the key factors that shape viewers' use of different TV services – from linear broadcast channels to subscription video-on-demand services (SVOD) – and identifies three new categories of TV viewer. These categories challenge the assumptions that changing viewing behaviours are largely driven by age and that viewers are shifting from linear to on-demand TV. They also reveal that how people watch TV aligns with the diversity of their viewing experiences and their attitudes towards television. In unpacking how and why people's ways of watching TV are changing, the report argues that a more nuanced understanding of changing audience behaviours is required in industry and policy responses to the rise of VOD.

Ways of Watching draws on data gathered through a representative survey of 1,495 UK participants in May 2021. It defines TV as any audiovisual content, from movies and television programmes to online videos, viewed on household screens, such as television sets, tablets, computers and mobile phones, including through TV channels, on-demand and video-sharing services.

Ways of Watching is the fourth report produced as part of the Routes to Content project. It builds on two waves of qualitative research in 2019 and 2020. Earlier reports based on this research can be accessed here.

Context

Use of SVOD services, such as Netflix, in the UK have significantly increased since 2019. And although the uptake of SVOD plateaued slightly in 2023, 66% of UK households subscribed to at least one service in Q1 of 2023.[1] Our previous report showed that despite the increased uptake of SVOD, most participants used four different types of audiovisual service to watch TV (e.g. free-to-air channels, broadcast video-on-demand (BVOD), video sharing *and* SVOD).[2] This accords with recent analysis of BARB data by TRP Research that demonstrated a significant amount of switching between different TV services.[3]

TRP Research categorises viewing behaviour according to the amount of linear TV that people watch. *Ways of Watching* takes a different approach. We analyse data collected about the frequency with which our participants used different kinds of TV services: free-to-air linear channels, free video-on-demand services (such as iPlayer and ITVX), SVOD services, free video-sharing platforms (such as YouTube), pay-TV services (such as Sky TV) and transaction video-on-demand (renting or purchasing streamed content). From this data we have identified three categories of viewer according to the likelihood of watching these different types of TV service.

This research helps us to understand how viewers are watching television as the uptake of video-on-demand increases and viewing of linear TV channels decreases. We identify key factors that shape people's use of linear television and adoption (or not) of online forms of television. With debates about the direction and relevance of public service television, which

[1] Ofcom, *Media Nations* 2023, p.15.

[2] Johnson et al, *Routes to Content After Covid-19: Interim Report*, 2022: 3.

[3] Ofcom, *Media Nations* 2023, p.17-21.

is primarily watched via linear television, in this digital television landscape and concerns about the future of the digital terrestrial television spectrum, this research offers insights into how and why viewers watch different types of television.

The report thereby also contributes to debates about diversity of media exposure. The centrality of algorithmic personalisation within SVOD services, and in online environments more generally, raises concerns that with the increased uptake of VOD viewers will be encountering, and therefore watching, a narrower range of programming. Furthermore, unlike public service broadcasters, SVODs in the UK have no requirements to make a range of genres available. This report advances these debates by exploring how ways of accessing television relate to the genres viewers select and prefer.

Executive Summary

Our UK-based research discovered that viewers cluster around three distinct ways of watching television by using a mix of services. We describe these three groups as:

All-Watchers (53%)	Free-Watchers (30%)	Subscribers (17%)
• Watched the full range of available services, from linear broadcast channels, to VOD, pay-TV and video streaming services.	• Primarily watched linear broadcast channels, BVOD services (such as BBC iPlayer) and free video streaming services (such as YouTube).	• Mainly watched SVOD services, such as Netflix.

These groups have been identified based on latent class analysis that predicts the probability of viewers in each group following six routes to access televisual content.

Latent Classes of Routes to Content
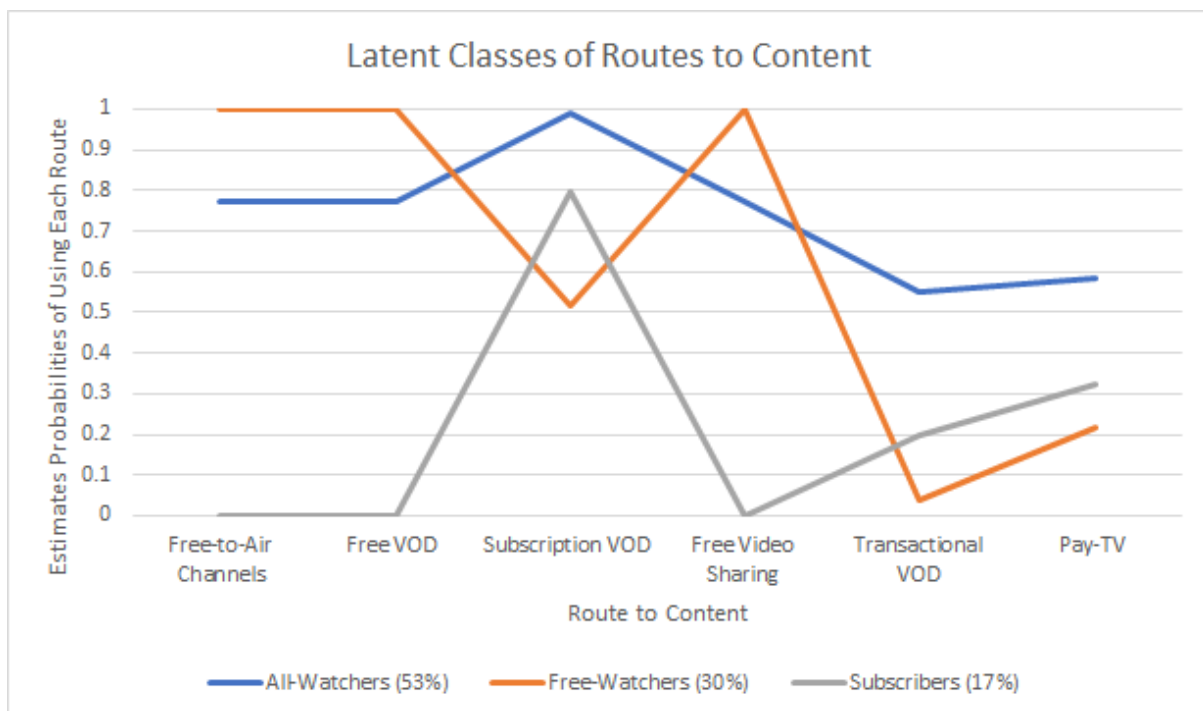
1. The Importance of Social and Economic Factors in Shaping TV Viewing:

The key differences between the All-Watchers, Free-Watchers and Subscribers can be summarised as follows:

Factor	All-Watchers (53%)	Free-Watchers (30%)	Subscribers (17%)
Demographics	• Average age of 44. • Highest household income.	• Average age of 58. • Lowest household income. • More likely white.	• Average age of 44. • Average household income.
Viewing Behaviour	• Highest TV viewing hours. • More likely to watch TV with others. • Used greatest variety of methods to discover new programmes to watch.	• Below average TV viewing hours. • More likely to watch TV alone. • Used fewest methods to discover new programmes to watch.	• Lowest TV viewing hours. • Most likely to watch TV alone and away from living room. • Least likely to discover programmes by chance.
Experience of TV	• More emotionally engaged with TV than the other groups. • Most likely to feel challenged when watching TV.	• Less likely to experience positive emotions when watching TV. • Least likely to feel connected to others and most likely to feel critical about the way the world works when watching TV.	• Less likely to experience positive emotions when watching TV. • Least likely to feel challenged by the content that they watch.
Expectations and Values of TV	• Above average support for public funding of TV. • See the primary function of TV as to 'switch off'.	• Above average support for public funding of TV. • See the primary function of TV as to inform/educate.	• Lowest support for public funding of TV.
Genre Preferences	• Watched a wide range of genres.	• Watched a narrower range of genres. • High TV news and factual viewer.	• Watched the narrowest range of genres. • Low TV news and factual viewer.

2. Diversity of TV Experience:

Our research indicates that the configurations of TV services viewers use align with the diversity and quality of their television viewing experiences. Those using the widest range of TV services had more diverse viewing experiences and engaged with a wider variety of genres.

Choices of TV services express different viewing motivations and contexts that we summarise as either *sociable* or *selective* approaches to television. All-Watchers (53% of our sample) had a sociable approach, commonly watching with others and most likely to learn about new content from friends, family and others, translating to a more varied TV viewing experience. Free-Watchers and Subscribers – together just under half (47%) of our sample – had a more selective approach to television, enjoying fewer genres. However, there were significant differences in genre preferences between these two groups: news and other factual programming were particularly popular among Free-Watchers and much less likely to be watched by Subscribers.

As sociable viewers, **All-Watchers** watched the widest range of different kinds of TV service and encountered new content through the broadest variety of methods. They reported watching the widest range of genres and experiencing the widest range of positive emotions when watching television. Despite being most likely to select 'switching off' as the primary function of TV, they were also most likely to report feeling challenged in their beliefs when watching television. We hypothesise that because they largely watched with other people, they were more likely to encounter programming that was less personalised or in line with their existing tastes.

As selective viewers, **Free-Watchers** used a narrower range of TV services and regularly watched a narrower range of genres than All-Watchers, but more than Subscribers. Free-Watchers reported lower than average daily hours of TV viewing and a less emotionally rewarding response when watching television. Their TV viewing appears to be driven by a desire for information and education. Free-Watchers were most likely to report using television to watch TV news and other factual genres, such as current affairs and science/nature programmes. This accords with their perception of the primary normative function of TV being to inform and educate. As with All-Watchers, they generally supported public funding for television. We hypothesise that their primary viewing of linear broadcast television stems, in part, from a preference for television underpinned by public service values.

Subscribers had the most selective approach to their media consumption. They used fewer TV services (largely just SVOD) and enjoyed the narrowest range of genres. They reported lower levels of positive emotions when watching television and were least likely to report feeling critical and challenged when watching television. They were less engaged with political, local, breaking and UK news than the other two groups and were more likely to access news from social media and newspapers. Their general experience of television was the least diverse of the three categories of viewer. We hypothesise that their preference for SVOD is associated with narrower tastes and interests.

Recommendations

1. It is not helpful to class TV viewers as either streamers or non-streamers. Most people use a range of services to watch TV, combining broadcast linear television with video-on-demand and online video services.
2. Just over half of our sample (All-Watchers) used a wide range of TV services, while the other half (Free-Watchers and Subscribers) had a more selective approach. As the media market shifts away from linear towards on-demand television, we need a greater understanding of those selective viewers to make informed industry and policy decisions.
3. *Ways of Watching* demonstrates that those relying on free television, including linear broadcast TV and free on-demand services (Free-Watchers), share more similarities in

their practices and experiences with on-demand focused Subscribers than with All-Watchers who use the full range of available routes and services to watch television. Industry and policy responses to changing audience behaviours need to consider the wide range of drivers and barriers to streaming and VOD adoption beyond the current focus on technology, infrastructure and literacy.

4. Where current debates tend to focus on age, our research suggests that demographically, race/ethnicity and income are also important factors in determining the types of TV services used. Beyond demographics, our research suggests that the following factors both shape and are shaped by people's ways of watching:
   a. Amount of TV viewing.
   b. Likelihood of watching alone or with others.
   c. Emotional responses to watching television.
   d. Genre preferences, including range of genres and preferences for news/factual television.

5. Our research indicates that maintaining a mixed broadcast ecology with access to a range of different kinds of television services appears to support a diversity of viewing experiences for a significant proportion of viewers (All-Watchers). However, it also suggests that providing access to a wide range of TV services alone is not enough to ensure engagement with a diverse range of content. Industry and policymakers need to address the role of viewers in the processes of content selection (rather than just content access) and their social and economic context, as much as the changing industrial and technological contexts.

6. Those with the lowest household incomes (Free-Watchers) rely heavily on TV for news and factual content. It is important that a range of high-quality trusted TV news and factual programming remains free at the point of use, easily accessible to all citizens.

7. Those with the lowest household incomes (Free-Watchers) also largely rely on linear broadcast TV. This points to the importance of the range and quality of TV services that can be accessed without a paywall or subscription. As we transition away from linear television, public service media need to do more to attract these viewers to their on-demand services. This includes making the news, current affairs and factual genres not found on SVODs more accessible and prominent within their on-demand services.

8. The majority of TV viewers watch with other people, and the extent to which TV is watched alone is strongly related to the kinds of TV services used, with All-Watchers, who have the most diverse viewing experiences, more likely to watch with others. Models of individualistic TV viewing need to be juxtaposed with approaches that pay close attention to the importance of social context – including watching with others and talking about television with others – in shaping viewing behaviours, choices, experiences and attitudes.

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October 2023

Detailed Findings: The Viewing Categories Explained

All-Watchers: Highly engaged, sociable viewers

All-Watchers made use of the full range of available television services: linear broadcast channels, broadcast video-on-demand (BVOD), video streaming services (such as YouTube), subscription video-on-demand (SVOD), transaction video-on-demand (TVOD, such as paying to rent or download content online), and pay-TV (such as Sky). They made up just over half of our sample (53%).

All-Watchers had a high engagement with television. They reported watching more hours of TV per day than the average for our sample overall and significantly more than both other groups. For this group, television was something that they enjoyed with other people. They were least likely to live alone, most likely to have children, and reported watching TV mostly with other people. This included their partner/spouse, but also other adult relatives, children, friends and housemates. For these people, television formed part of their social activities. They were most likely to describe the function of television as being able to 'switch off', and they reported watching in multiple rooms around the house, as well as in public and while travelling. When asked how frequently they experienced different emotions when watching TV, All-Watchers were far more likely to report greater emotional involvement. They were most likely to describe feeling 'surprised', 'challenged' and 'connected', as well as 'happy' and 'comforted', when watching television. This is a group, therefore, for whom TV viewing plays an important part in their everyday lives.

Demographically, All-Watchers had an average age of 44, which makes them the same average age as the Subscribers. Their average annual household income was above the average for the sample overall and the highest of the three groups, providing them with the resources to be able to pay for multiple different TV services. Although they accessed television through a wide range of different services, this group was as likely to report using linear channels (particularly the BBC and Channel 4) as the Free-Watchers and more likely to report watching SVOD services (Amazon Prime, Apple TV+, Disney+, BritBox, ITV Hub+ and Netflix) and YouTube than the other two groups. Despite using SVOD and pay-TV services, All-Watchers were above average in agreeing that public funding for television is important and attached far greater importance to British content than the Subscribers.

All-Watchers had a varied TV diet. They reported watching the largest number and widest range of TV genres. They were also far more likely than the other two groups to describe participating in a range of different cultural activities. They also discovered new content from a range of sources. When asked how they find new content to watch, All-Watchers reported using the highest number of different pathways (8.4). They were most likely to discover new programmes by chance, through trailers or advertising, via word of mouth, through clicking on recommendations on a VOD service and clicking on-screen recommendations.

Overall, All-Watchers have a 'sociable' attitude towards television. These are people for whom watching television is an important aspect of everyday life, in the maintenance of interpersonal relationship and of their social fabric. Although they saw the primary function of TV to be able to switch off and relax, they were also most likely to feel challenged in their beliefs when watching television. We hypothesise that this is not because they specifically seek out television to inform or educate (as the Free-Watchers may do), but because they frequently watch with other people and thus encounter a wider range of new content.

All-Watchers: Key Data

Demographics:
- Average age of 44.
- Younger than Free-Watchers, same age as Subscribers.
- Above average household income.

Viewing Behaviours:
- Highly likely to use FTA, BVOD, free video-streaming services and SVOD and likely to also use pay-TV services and TVOD.
- Highest TV viewing hours.
- Mostly watched with other people.
- Used the highest number of methods to find new content to watch.

Viewing Context:
- Most likely to live with children.
- Least likely to live on their own.
- Participated in a wider range of social and cultural activities compared to the other two groups.

Experience of TV:
- Greater emotional response to TV, being more likely to report feeling happy, surprised, critical, challenged, connected, and comforted when watching TV.
- Most likely to report feeling their beliefs challenged when watching TV.

Genre Preferences:
- Watched the largest number and widest range of genres.
- Fairly likely to regularly watch TV news.

Attitude towards TV:
- Sociable – TV part of everyday sociality.
- Saw the primary function of TV as to switch off.
- More likely to support public funding for TV than Subscribers.

53% of the Sample

Free-Watchers and Subscribers: Less engaged, more selective

Compared to All-Watchers, television played a less central role in the lives of Free-Watchers and Subscribers in terms of the time spent watching television. For these groups, watching television was also less likely to foster a sense of happiness and belonging, articulated through feeling comforted and connected to others. Both Free-Watchers and Subscribers were more likely to live on their own and less likely to have children than All-Watchers. Both groups also had a significantly lower household income than All-Watchers. Despite these similarities, there are some key differences in behaviours, attitudes and genre preferences between the Free-Watchers and Subscribers. Subscribers – possibly reflecting a tendency to select content closely resembling existing tastes and preferences – were significantly less likely to experience their television viewing as challenging to their beliefs. By contrast, Free-Watchers were most likely to report feeling critical about the way in which the world works when watching television. Given the age difference between Free-Watchers and Subscribers, these differences might be reflective of generational attitudes.

Free-Watchers: Informative use of TV

Free-Watchers were the group most likely to be associated with watching linear broadcast TV. With an average age of 58, they were significantly older than the other groups (44) and the

sample overall (47). They were more likely to be white and had the lowest average household income of our three groups. Free-Watchers primarily watched linear broadcast TV channels, were least likely of the two groups to subscribe to SVOD and were very unlikely to use pay-TV and TVOD. However, members of this group were as likely to have used BVOD and free video streaming services (like YouTube) as linear TV. This challenges the assumption that VOD and video streaming are replacing linear TV. Rather, it suggests that Free-Watchers are integrating free video streaming and BVOD services into their linear viewing habits.

Although Free-Watchers had the lowest average household income of the three groups, their use of free linear, streaming and on-demand services is not solely a matter of cost. Their attitude towards and experience of watching television differs from the other groups. They are the group most likely to view informing and educating as important functions of television. And they share with the All-Watchers an above average assertion that public funding is important for television. They reported regularly watching news, current affairs, arts and gardening/DIY/house programmes on television at a higher rate than the other groups. Having commonly grown up in a pre-streaming media environment, they held stronger normative views about the purpose of television shaped by public service ideals and regularly watched content associated with public service television, such as news, current affairs and arts. Free-Watchers were also more likely than any other group to report feeling critical about the world when watching television and least likely to report feeling happy, surprised, connected or comforted.

Free-Watchers used a smaller number of different methods to discover new content to watch (average of 6.5). They were most likely to use 'linear' methods to find new content, such as reading a printed TV guide, and were least likely to discover new programmes through online methods, such as browsing or clicking on recommendations within VOD services, using search engines or online review sites. They were also least likely to find new content through word of mouth, which, combined with their comparatively low level of co-viewing supports the hypothesis that television viewing plays a less important role in their social interactions. They were far more likely to watch alone and on occasions when they did watch television with other people, they were most likely of the three groups to report that it was the other person who decided what to watch.

As with Subscribers, Free-Watchers have a more selective attitude towards television. However, their viewing preferences and association of TV with the normative values of public service broadcasting suggest that they primarily value TV as a source of information and education. We hypothesise that their primary viewing of linear broadcast television is related to a preference for television underpinned by public service values.

Free-Watchers: Key Data

Demographics:
• Average age of 58.
• More likely to be white than the other groups and the sample overall.
• Lowest average household income.
Viewing Behaviours:
• Equally likely to use FTA, BVOD and free video-streaming services. Least likely to subscribe to a VOD or pay-TV service, rent or pay to stream TV.
• Slightly below average TV viewing hours.
• More likely to watch alone that All-Watchers.

• Used the lowest number of methods to find new content to watch and least likely to use online methods.

Viewing Context:
    • Very unlikely to live with children.
    • Far more likely to live on their own than the All-Watchers.
    • Participated in a smaller range of social and cultural activities than All-Watchers.

Experience of TV:
    • Low emotional response to TV.
    • Least likely to report positive emotions when watching TV.
    • Most likely to report feeling critical when watching TV.

Genre Preferences:
    • Regularly watch a significantly smaller number of genres than All-Watchers.
    • Most likely to watch current affairs, arts, gardening/DIY/house, and news programmes.

Attitude towards TV:
    • Selective.
    • Informative – regularly watch informational and educational programs on television.
    • Saw the primary function of TV as to inform/educate.
    • More likely to support public funding for TV than Subscribers.

30% of the Sample

Subscribers: Highly selective use of TV

Like Free-Watchers, television appears to play a more selective role in the lives of Subscribers. This group watched the lowest number of hours of television per day. They also reported a lower emotional response to television and were statistically far more likely to live and watch television on their own than the All-Watchers. They did, however, have a higher household income than Free-Watchers, just under the average for our sample and were younger, with an average age of 44. Their higher household income and lower age might explain why they subscribed to SVOD services; however, they were equally likely not to use free video streaming services (like YouTube and Twitch) as free VOD services and linear channels. We can't, therefore, explain the differences in TV use between Subscribers and Free-Watchers solely in terms of costs – Subscribers being more likely to afford SVODs – or preferences for online services. What also matters are their attitudes towards and experiences of television.

Subscribers were the least likely of our three groups to describe feeling critical about the world or challenged in their beliefs when watching television, and more likely than Free-Watchers to report feeling happy. As with Free-Watchers, however, they were less likely to see escapism as a key function of television. Of the three groups, they reported regularly watching the smallest number of genres. Subscribers were most likely to watch genres associated with prominent fan cultures such as animation/cartoons, sci-fi/fantasy and user-generated content (although such genres were also popular among All-Watchers). Traditional televisual genres such as competition shows, comedy and panel shows, current affairs, food, game shows and quizzes, gardening/DIY/house programmes, hospital drama, music TV, news, soap operas, sport, talk shows, and travel/holiday shows were least popular among this group. This eclectic list might indicate that Subscribers were not driven to SVOD for specific genres of programmes to the same degree Free-Watchers appear to be motivated by informative and educative

programming. Rather what distinguishes Subscribers is less diversity in the range of genres that they watch, which points to a greater specificity in their tastes and preferences.

What this points to is a more selective approach to viewing. Despite watching lower levels of television and reporting a lower emotional response to TV than All-Watchers, Subscribers appear prepared to pay for a selective and personalised set of content. This hypothesis is corroborated when looking at their news consumption. Of the three groups, Subscribers were far more likely to use newspapers and social media sites to access news content and less likely to watch linear broadcast TV. Using newspapers and social media suggests a selective and personalised approach to media consumption that extends beyond television viewing. Subscribers are using TV in more specific ways, subscribing to services for selective, personalised content.

As with Free-Watchers, Subscribers used a smaller number of different methods to discover new content to watch (average of 6.69) than All-Watchers. Unsurprisingly, they were least likely to discover new content using linear methods, such as reading a printed TV guide, browsing an electronic programme guide, or watching the channel usually watched. However, they were also least likely to discover new content by chance, from reviews/discussions in the press or from trailers or advertising. While they were more likely that Free-Watchers to use online methods of discoverability, such as browsing a VOD service or using a search engine or online review site, they were less likely to use these methods than All-Watchers. This accords with the hypothesis that Subscribers adopt a selective approach to TV viewing.

Although this is the smallest group in our sample, given the age difference we hypothesise that the distinction between Subscribers and Free-Watchers might in part be generational. As such, we expect the size of the Free-Watchers group to decline and the size of the Subscribers group to increase. This is potentially problematic for civic notions of television, given the value that Subscribers ascribe to selective and personalised viewing. Being more likely to have grown up in an age of multi-channel television than the Free-Watchers, the Subscribers appear to have a more personalised approach towards television. With television, and in particular broadcast television, playing a less important role in their lives than in the other groups of viewers, they are significantly below average in valuing public funding for television. This group is prepared to pay for access to selective and personalised TV services and is less likely to use as full a range of methods to discover new content to watch. Possibly as a consequence, they are less likely to feel challenged or critical when watching television.

Subscribers: Key Data

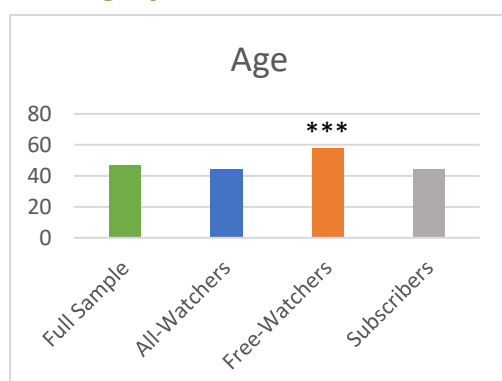| **Demographics:** |
| --- |
| Average age of 44. Younger than Free-Watchers, same age as All-Watchers. Higher average household income than Free-Watchers but lower than All-Watchers. |
| **Viewing Behaviours:** |
| Highly likely to subscribe to SVOD, don't use FTA, free VOD or free video sharing and unlikely to subscribe to pay-TV, rent or pay to stream TV. Lowest TV viewing hours. More likely to watch alone that All-Watchers. Least likely to watch in the living room. |

| |
|---|
| • Used a smaller number of methods to discover new content to watch than All-Watchers. |
| • Discovery of new content influenced by online forms of recommendation. |
| **Viewing Context:** |
| • Unlikely to live with children. |
| • Far more likely to live on their own than the All-Watchers. |
| • Participated in a smaller range of social and cultural activities that All-Watchers. |
| **Experience of TV:** |
| • Low emotional response to TV. |
| • Least likely to report feeling challenged or critical when watching television. |
| **Genre Preferences:** |
| • Watched the narrowest range of genres. |
| • Fairly eclectic genre preferences. |
| **Attitude towards TV:** |
| • Selective. |
| • Least likely to agree that public funding is important for television. |
| **17% of the Sample** |

Key Factors Shaping the Viewing Categories

This section unpacks the key factors that have emerged as significant in differentiating the ways in which these three categories of viewer watch television.

Demographics:

Age

The key demographic factors distinguishing these three categories of viewer were age, race/ethnicity and household income. [4]

All-Watchers and Subscribers had an average age of 44, younger that the sample average of 47, while Free-Watchers were significantly older, with an average age of 58. Free-Watchers were also statistically more likely to be white and had the lowest average household income, significantly below the average for the sample.

Percentage of White Participants

Household Income

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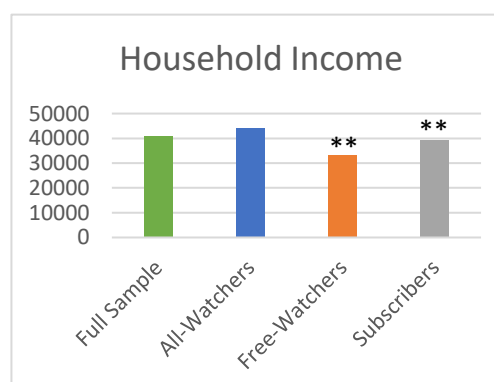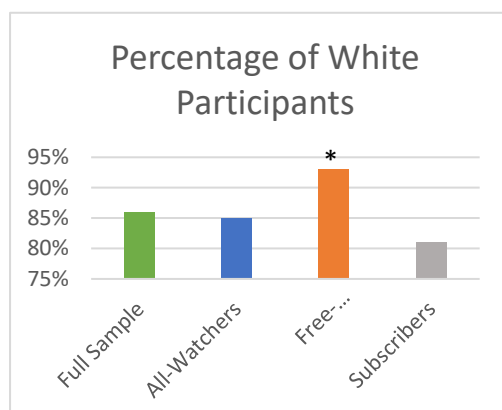
[4] Asterisks indicate significant differences (controlling for all other demographic variables) from the "All-Watchers" group at the following p values: *=p<.05, **=p<.01, ***=p<.001. The greater the number of asterisks, the higher the significance of the difference.

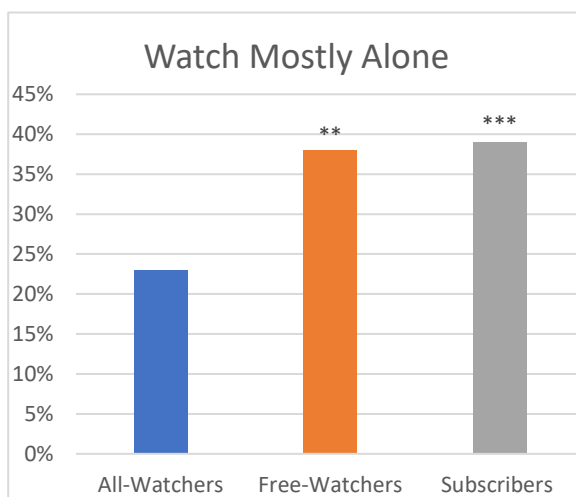## Amount of TV Viewing:
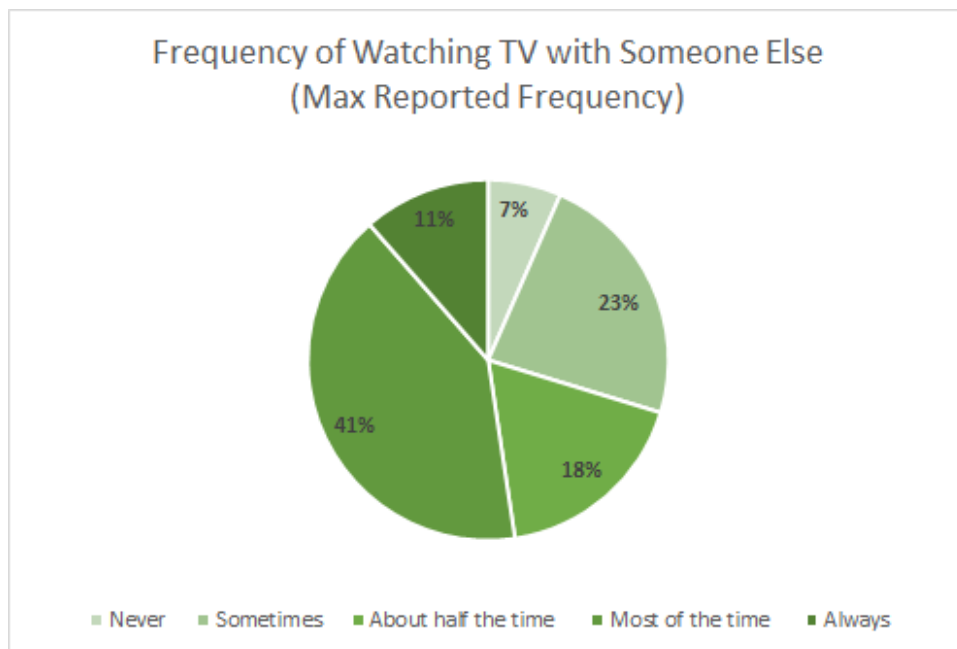
Hours of TV per Day
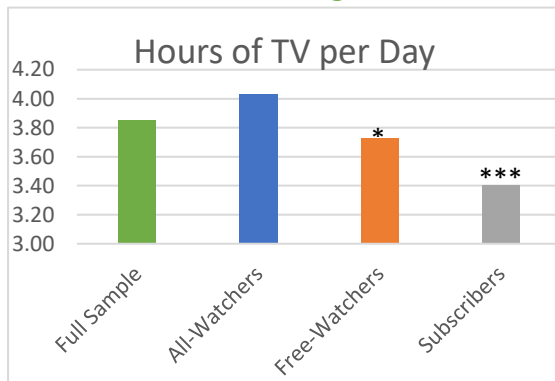
All-Watchers reported watching above-average amounts of TV compared to the sample overall and significantly more than the other two groups.

Subscribers and Free-Watchers reported below-average viewing hours, with Subscribers watching significantly less television than the other two groups.

Viewing Context:

The majority of TV viewing across our sample took place with other people. Only 7% of participants reported watching completely alone (or "never" watching with anyone) and 79% reported TV viewing with others at least sometimes.

Frequency of Watching TV with Someone Else (Max Reported Frequency)

■ Never ■ Sometimes ■ About half the time ■ Most of the time ■ Always

Watch Mostly Alone

However, Free-Watchers and Subscribers were far more likely to watch alone than All-Watchers. This corresponds in part to their domestic situations. While across the sample as a whole, the majority of our participants lived with a partner or spouse, both Free-Watchers and Subscribers were more likely to live alone than All-Watchers and they were less likely to have children. Furthermore, despite over half of Subscribers and Free-Watchers living with a partner/spouse they were less likely to watch TV with their partner/spouse than All-Watchers, and highly

unlikely to watch with other adult relatives, children, friends or housemates. Put simply, All-Watchers frequently watched television with a wide range of other people, while Free-Watchers and Subscribers were far more likely to watch *alone.*

Viewing Experience:

We asked our participants how frequently they experienced a range of different emotions when watching television.
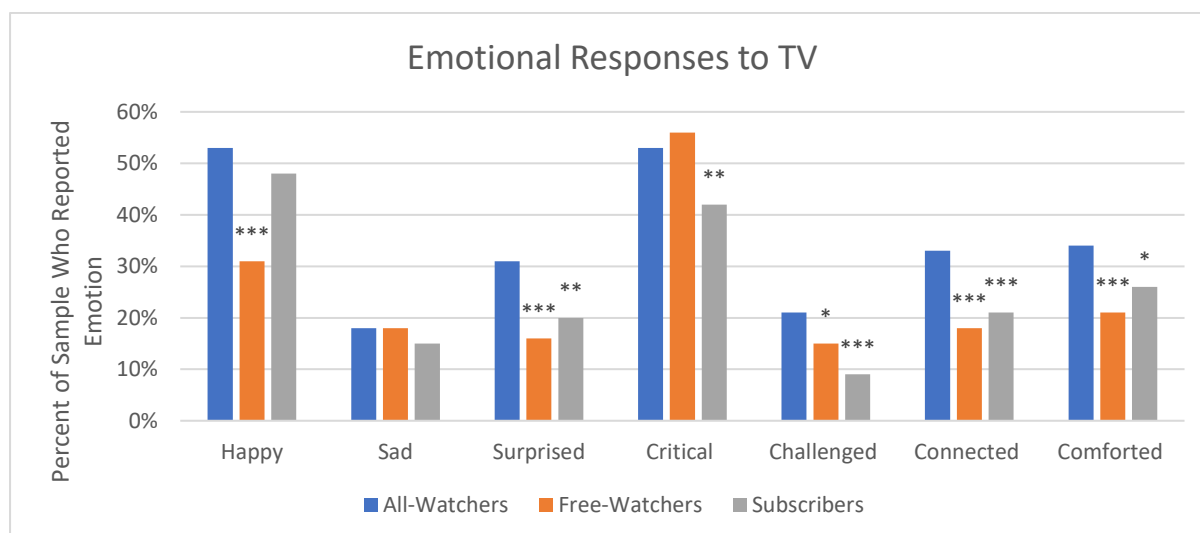
All-Watchers had a generally high emotional response to television and reported experiencing a wide range of emotions when watching TV: happy, sad, surprised, critical, challenged, connected and comforted. They were most likely to report feeling happy, challenged, connected and comforted.

Free-Watchers and Subscribers had a generally low emotional response to television, being less likely to experience positive and negative emotions when watching television. However, Free-Watchers were most likely to report feeling critical when watching television, particularly compared to Subscribers, and were least likely to report feeling happy when watching television.

Expectations and Values:
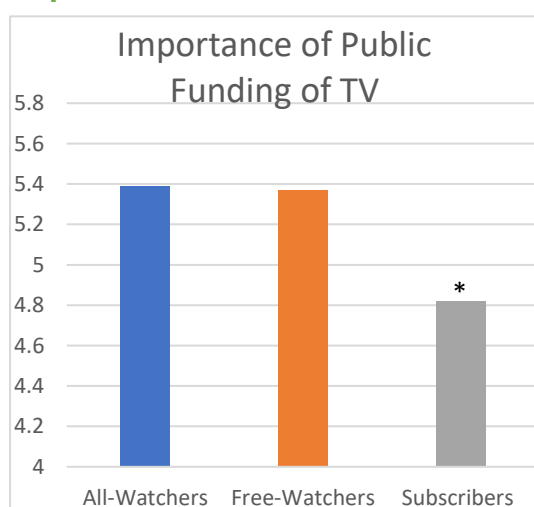
There were key differences between the expectations and values of TV across our three categories of viewer. Subscribers were statistically less likely to support public funding of television.

When asked what they considered to be important functions of television, there was significant consensus across the three groups. 'To switch off' and to 'inform/educate' were considered the two most important functions of television by all three groups. However, All-Watchers were statistically more likely to select 'to switch off' and Free-Watchers were statistically more likely to select to 'inform/educate'.

Functions of TV
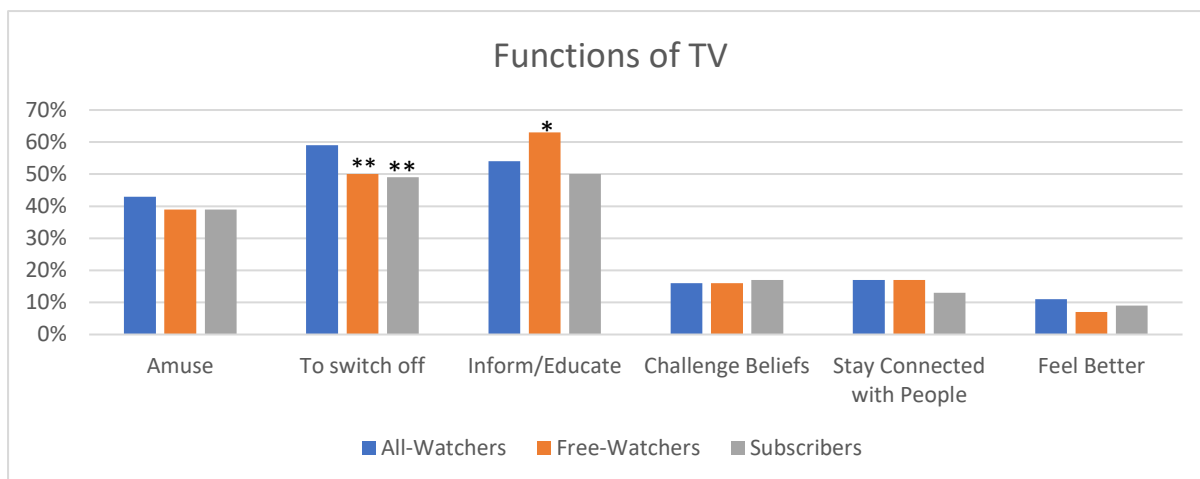
Genre Preferences:

There were significant differences between the kinds of genres that Free-Watchers, Subscribers and All-Watchers reported regularly watching. Free-Watchers and Subscribers reported regularly watching a smaller number of genres that All-Watchers. This suggests that the use of TV services is likely to be related to the kinds of genres that people prefer to watch.

Genres Regularly Watched by Class

Genres Regularly Watched by Class (Continued)
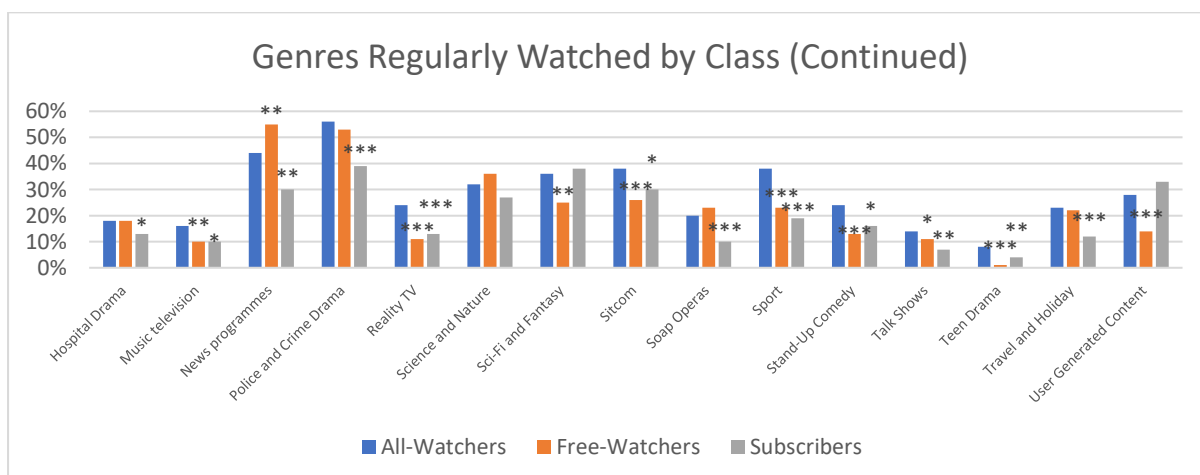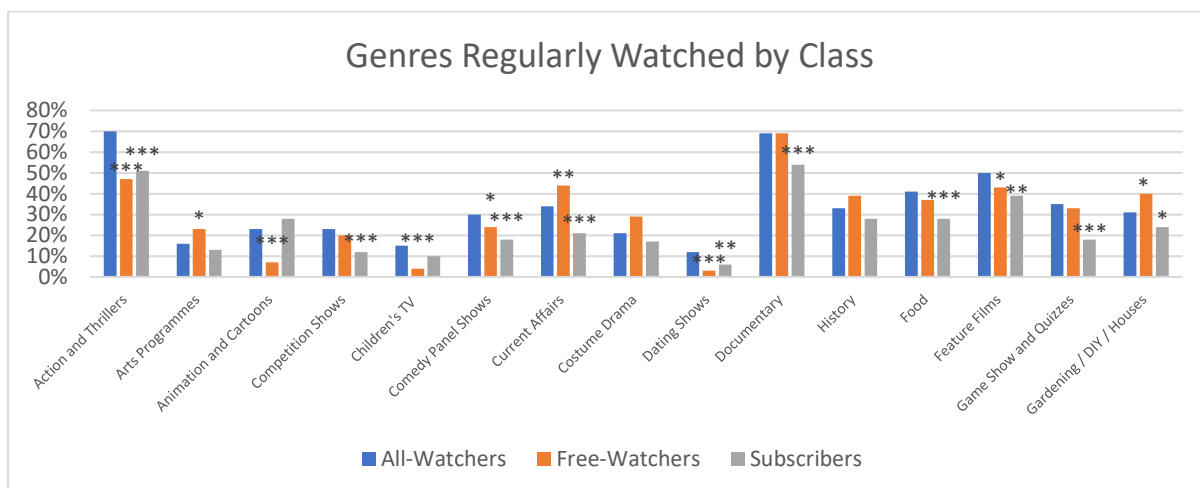
Of the three groups, Subscribers reported regularly watching the narrowest range of genres. They were most likely to report watching animation/cartoons, Sci-Fi/fantasy and user-generated content, but none of these were statistically significantly different to the All-

Watchers. This means that they weren't more likely to regularly watch these genres than the All-Watchers. By contrast, Free-Watchers were statistically most likely to report watching arts programmes, current affairs, gardening/DIY/house programmes and news programmes than the other two groups. These are genres commonly associated with linear television and not typically provided by SVOD services. News, current affairs and arts programmes are also associated with cultural discernment and public service broadcasting.

However, it is the All-Watchers that reported regularly watching the largest number and widest range of genres. This contributes to a broader picture of All-Watchers as engaging with a greater diversity of TV experiences than the other two groups. Beyond TV genre preferences, All-Watchers also reported engaging in a far wider range of cultural and sporting activities than the Subscribers and All-Watchers.

Watch TV News Regularly
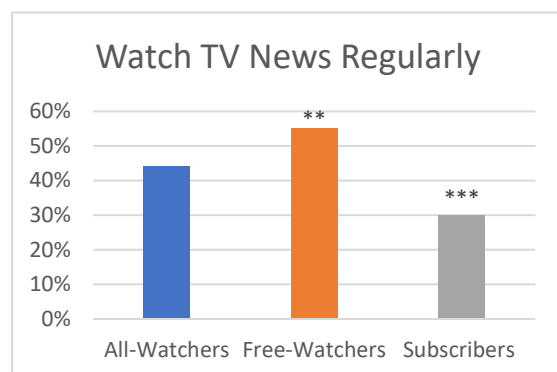
These differences in genre preference appear to carry over into the sources used by each category of viewer to access news. Free-Watchers were far more likely than the other two groups to regularly watch TV news. By contrast, Subscribers were far less likely to report watching TV news and more likely to access news from newspapers and social media sites. They were also less interested in political, local, breaking and UK news than the other groups.

Discoverability:

We asked our participants what methods they used to discover new content to watch.

Discoverability of Content
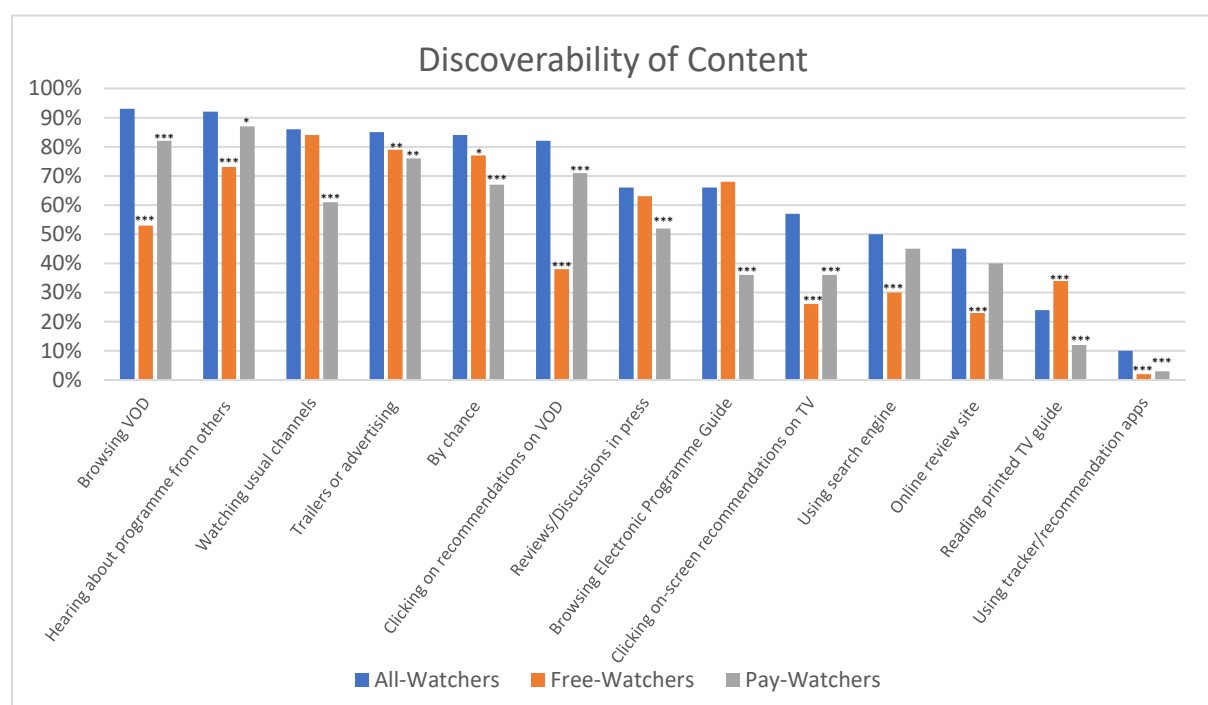
All-Watchers were most likely to use a wide variety of different methods to discover something new to watch than the other two groups. This accords with their broadly sociable approach to television, in which they drew on a range of sources and influences to discover new

programmes and films. Unsurprisingly, given that they primarily only use SVOD, Subscribers were highly unlikely to use linear methods of discoverability, such as browsing the electronic programme guide and watching favoured TV channels, which were more regularly used by Free-Watchers.
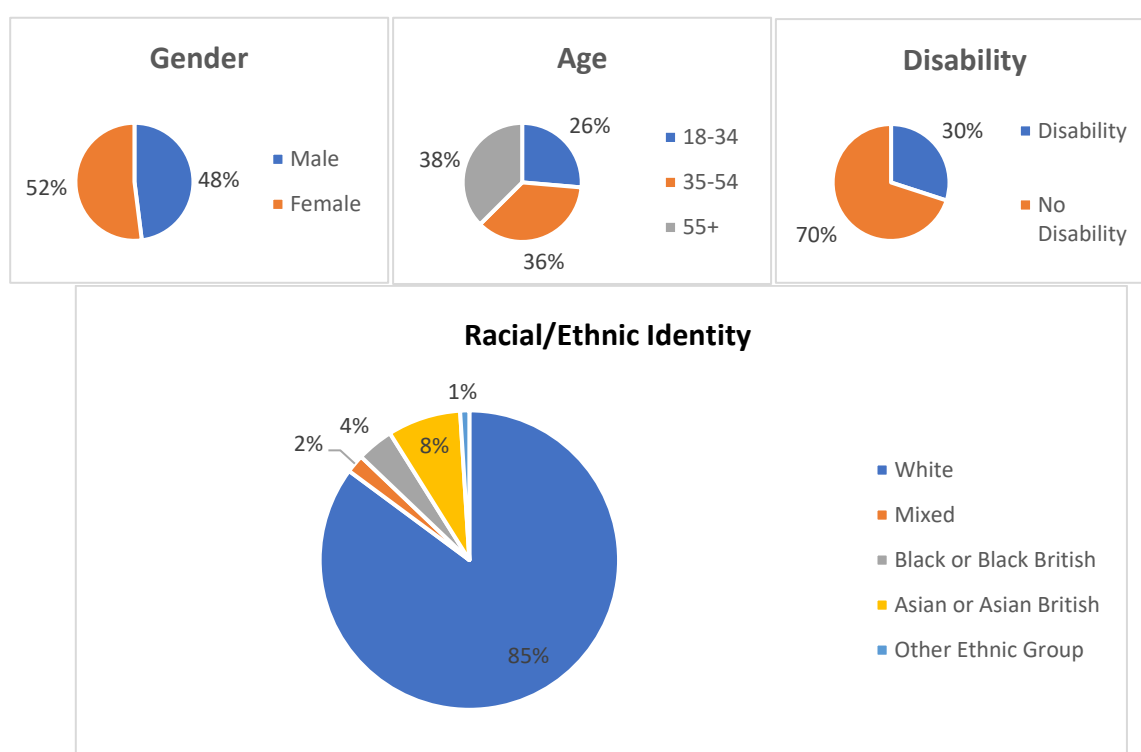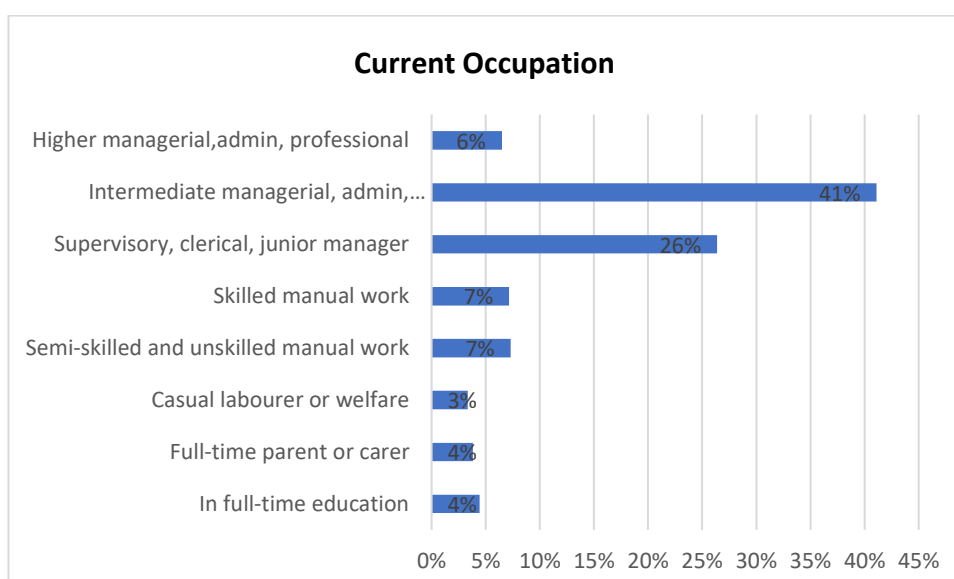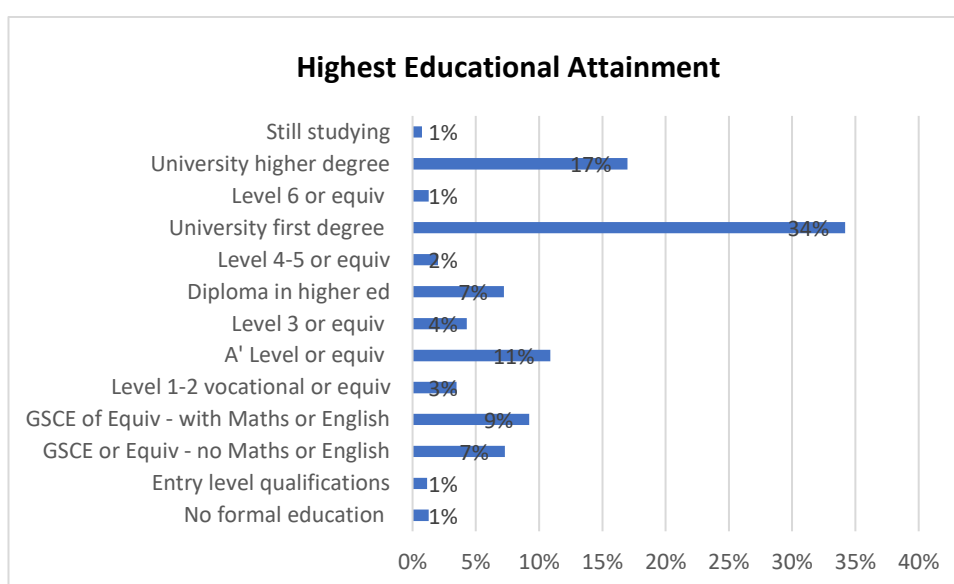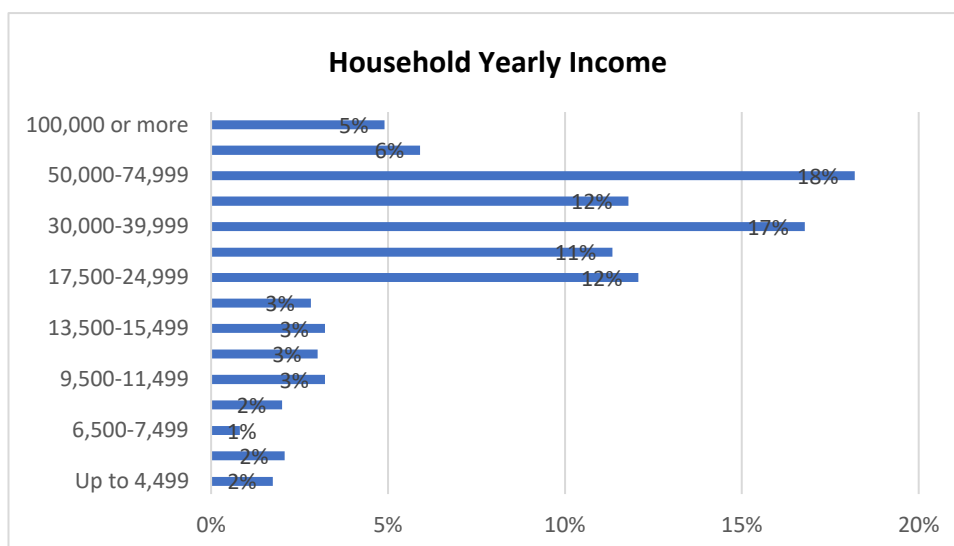
Methodology

The data presented in this report is based on a survey consisting of computer-assisted self-interviews of a representative sample of 1,495 people in the UK conducted in May 2021. The data relies on individuals' own self-reports of the TV habits and was conducted during the COVID-19 pandemic.

The three categories of viewers (All-Watchers, Free-Watchers, and Subscribers) were found using unconditional latent class analysis (LCA) conducted using MPlus. Differences between classes were found using t-tests of differences in the distribution of key variables between classes, as well as multinomial logistic regression controlling for all demographic variables using Stata. Latent class analysis has been described as a "person-centered" method that locates underlying patterns among individuals, rather than more "variable-centered" approaches. Although LCA allows for any number of latent classes, we found that three classes was the best fit by a variety of information criteria (such as the AIC, BIC, Entropy, Vuong-Lo-Mendell-Rubin Likelihood, and the Parametric Bootstrapped Likelihood Ratio Test).

These results (and the three categories we found) essentially show the underlying and distinct ways that individuals in this survey access television content (in whether they use free-to-air channels, free VOD, SVOD, free video sharing, TVOD, or pay TV). Our descriptions of how the groups differ focus on how the individuals in those categories are also statistically more or less likely to approach a number of other aspects of their television-watching differently.

The demographic distribution of the sample was as follows:

Household Yearly Income

- 100,000 or more: 5%
- (90,000-99,999): 6%
- 50,000-74,999: 18%
- (40,000-49,999): 12%
- 30,000-39,999: 17%
- (25,000-29,999): 11%
- 17,500-24,999: 12%
- (15,500-17,499): 3%
- 13,500-15,499: 3%
- (11,500-13,499): 3%
- 9,500-11,499: 3%
- (7,500-9,499): 2%
- 6,500-7,499: 1%
- (4,500-6,499): 2%
- Up to 4,499: 2%

Highest Educational Attainment

- Still studying: 1%
- University higher degree: 17%
- Level 6 or equiv: 1%
- University first degree: 34%
- Level 4-5 or equiv: 2%
- Diploma in higher ed: 7%
- Level 3 or equiv: 4%
- A' Level or equiv: 11%
- Level 1-2 vocational or equiv: 3%
- GSCE of Equiv - with Maths or English: 9%
- GSCE or Equiv - no Maths or English: 7%
- Entry level qualifications: 1%
- No formal education: 1%

Current Occupation

- Higher managerial, admin, professional: 6%
- Intermediate managerial, admin,…: 41%
- Supervisory, clerical, junior manager: 26%
- Skilled manual work: 7%
- Semi-skilled and unskilled manual work: 7%
- Casual labourer or welfare: 3%
- Full-time parent or carer: 4%
- In full-time education: 4%

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