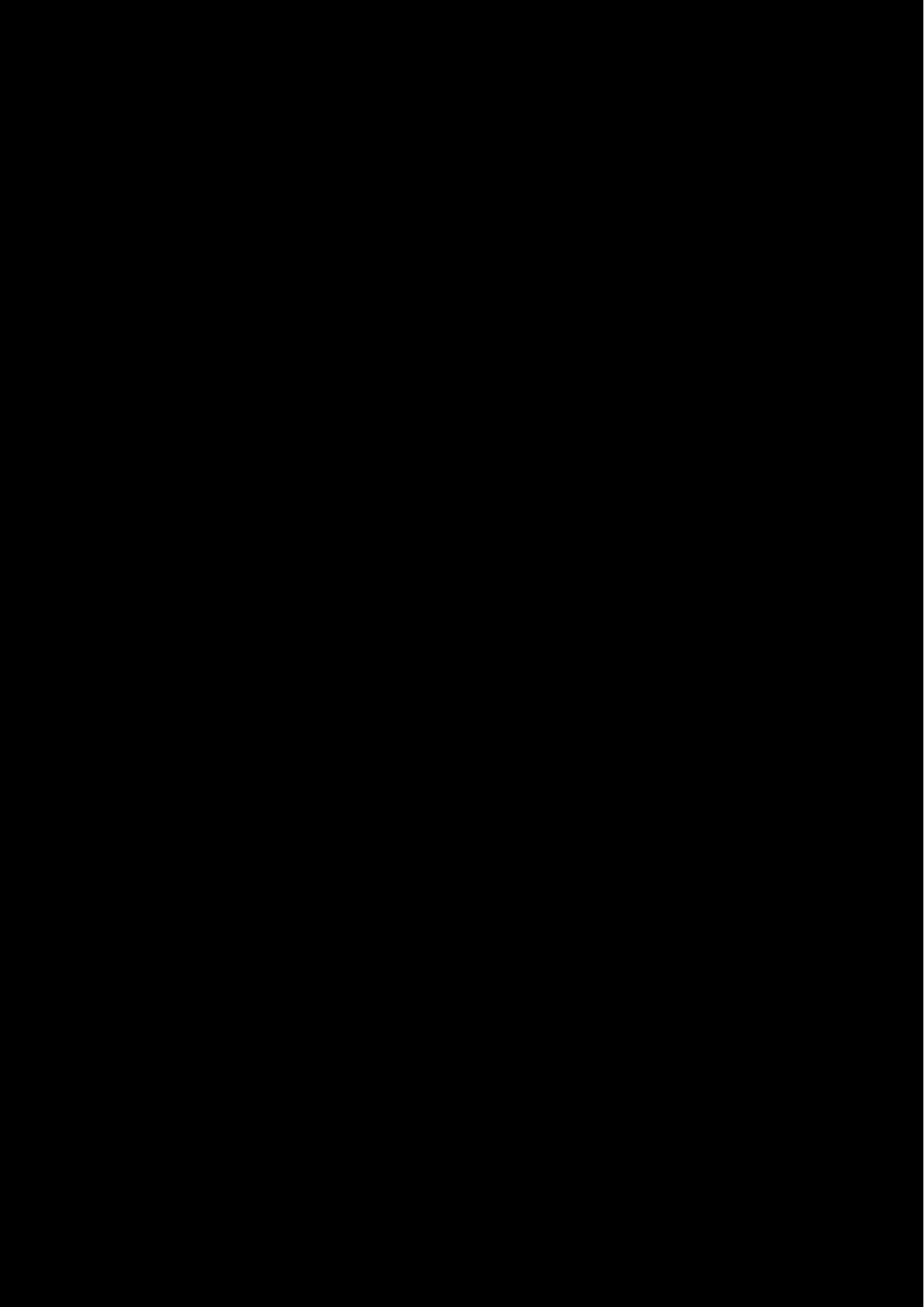



THE VIEWING REPORT

Our annual exploration of the UK's viewing habits

APRIL 2016



 bjective information is critical for the UK's television and advertising industry. Each year, £7bn is spent by broadcasters, marketers and agencies on the production and distribution of programme and commercial content. BARB provides a currency that is trusted to assess the return on this investment.

BARB can do this because we are owned by the industry that we provide services to. We deliver a Joint Industry Currency, which is rightly known as the gold standard.

BARB has been the official source of television figures in the UK since 1981. We constantly develop our measurement techniques in order to deal with fragmentation. We do so with rigour and vigilance, so that our data continues to meet the quality levels expected of BARB.

The Viewing Report brings to life the latest insights from BARB. We hope you enjoy reading it.

MEET OUR
CONTRIBUTORS



Tracy de Groose
Tracy was appointed UK CEO of Dentsu Aegis Network in 2014, having previously been the UK CEO of Carat. She applies her agency and client experience to the question of how Joint Industry Currencies can contribute to understanding the effect of marketing.



Torin Douglas
Torin has been reporting and analysing media issues for the business press and broadcasters for over 40 years, most notably on our screens as the BBC's Media Correspondent. In our opening essay, he considers the definition of television in the internet age.



Dan McGolpin
As Controller for BBC Daytime, Dan is responsible for all daytime commissioning across BBC One and BBC Two. In a Q&A, he brings a programme maker's view to the development of television audience measurement.



Pete Robins
Pete is the co-founder of media agency agenda21 and chairman of the IPA's Digital Media Group. Twenty years after buying his first online campaign, he reflects on the need for more objectivity in online measurement.

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HELLO,

Welcome to the 2016 edition of The Viewing Report.

Television continues to make conversations happen in the UK. You only have to watch an episode of Gogglebox to see the stimulating effect that it has in living rooms up and down the country. The debate in our industry about what makes great television can often be just as impassioned, not least because of the way that technology is perceived to be changing our media habits.

The Viewing Report opens this year with a question of definition: what is television in the modern age? Torin Douglas is well placed to contribute to this debate given the considerable change he's witnessed during his time as a commentator on the media industry.

We then feature new insight from BARB.

Firstly, we dig deeper into our panel data to understand how TV screens are being used for things other than watching live and catch-up programmes. How much screen time is spent gaming? What part of screen time includes viewing to SVOD services?

There is also fresh insight from our new, beta reporting of viewing through TV player apps. Launched last September, the TV Player Report is the first fruit of Project Dovetail and the first joint-industry, audited measure of online viewing in the UK. Here we go further into the data to understand when viewing is taking place and on which devices. Is there a rush hour peak as commuters view on their tablets and smartphones?

We're delighted to feature two guest contributors from the media planning industry. Tracy de Groose examines the role that data play in substantiating the effect of marketing campaigns, while Pete Robins argues that online measurement can learn lessons from media that have been proven over the years.

The view of programme makers comes from Dan McGolpin of the BBC. He highlights how it's as important to navigate through the explosion of channels as it is to understand

the rate at which viewers are migrating to new devices; objectivity, comparability and trust are watchwords along the way.

You'll also find some popular analyses of viewing behaviour from previous editions. That said, we haven't updated all the trendspotting features from previous reports, since we recently launched a companion report that focuses on changes in how people can watch television.

The UK Television Landscape Report is a quarterly review of data that are available from our Establishment Survey and is complementary to The Viewing Report. Side-by-side, these reports provide a rounded picture of changes in how people can watch television and how they do.

For 35 years, BARB has been dealing with fragmentation; it's the one constant in an era of perpetual change. As a Joint Industry Currency, we have a natural responsibility to deliver trusted, objective evidence on changes in viewing behaviour. We also need to develop our services so that we can provide insight on all the new ways that people are watching television. You'll find an update in here on Project Dovetail, which is synonymous with our development strategy.

For all the latest news and updates on our developments, please visit www.barb.co.uk.

Happy reading,



Justin Sampson
Chief Executive
BARB

BARB IS OWNED BY
THE TELEVISION
AND ADVERTISING
INDUSTRY:
OUR AUDIENCE
MEASUREMENT
STANDARDS ARE
TRANSPARENT
AND UNIVERSALLY
ACCEPTED

WHAT'S IN A NAME?

Forgive me for quoting Shakespeare, but on the 400th anniversary of his death, everyone else is. And in this digital age, BARB is just a fat finger away from the Bard.

The BBC, which can never resist an anniversary, is launching a Shakespeare Festival, with Judi Dench, Benedict Cumberbatch, David Tennant and 21 emojis “to introduce the Bard to the texting generation”. The cartoon faces will be linked to 250 quotes including, inevitably, “a rose by any other name would smell as sweet” in a project called ShakespeareMe.

The move has prompted accusations of dumbing down from some educationalists. But it also highlights the blurring of the lines between television and other forms of content and delivery (to use two jargon names that will never smell as sweet as real English).

What, these days, do we mean by television?

Is BBC Three *television* any more, now that it has forsaken the box in the corner of the room for the box on the desk and the laptop, tablet and phone? Surely the answer is still yes?

And what about other video content viewed over the internet? Netflix? Amazon Prime? YouTube? BT Sport? OTT? IPTV? They may not be *broadcast* television, but surely they're all television?

Recently, a media storm broke out about a “landmark change” in children’s TV viewing habits. “Young people are spending more time online than watching TV” said the 2016 Childwise Monitor report.

The story was prominently reported on Radio 4’s Today programme, Radio 5 Live and BBC Breakfast, which tweeted: “Does this sound familiar? Young people are spending more time online than watching TV”.

For the team at Thinkbox, the marketing body for commercial television, this was like a red rag to a bull. They started tweeting in response: “Please stop positioning the future of TV as broadcast vs. online - the broadcasters ARE online, they’re on any screen anywhere...”

So is it time for the broadcasting industry and bodies like BARB that serve it, to define what they mean by television in the age of the internet?

The internet propagandists won’t do this: they have been claiming for years that “TV is dead”. Yet arguably the reverse is true and TV, in all its forms, is now driving the growth of the internet.

For many years, we knew what we meant by television and radio. They were broad terms which included the electronic media used to transmit sound and moving images; the sets on which viewers and listeners received them; and the programme services and content. But then the internet pushed TV and radio into the same space as newspapers, music, films and emails, causing chaos and confusion.

The BBC, in a moment of modernist myopia, decided to abolish the terms television and radio and rename its two main departments *Vision* and *Audio and Music*. As its media correspondent, I had to add half a line to many reports, explaining that the Director of Vision was the person in charge of television (and not, by implication, the Corporation’s futurologist).

The BBC wanted to reflect the fact that it was creating audio and video content for delivery via the internet rather than the airwaves. But renaming the departments was wrong. Radio Times has listed television programmes for over 60 years, but it doesn’t keep changing its name to reflect the latest delivery system.

ARGUABLY,
TELEVISION IN
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INTERNET



In one of the first and most popular moves of Tony Hall’s regime as Director General, he brought back the departmental names *Television* and *Radio*.

Shouldn’t all broadcasters now reclaim those words, and define what they mean by them? How about “programme services for viewers and listeners”?

It may not be totally straightforward. BARB can now distinguish and measure radio listening via the TV set, which could cause a little confusion.

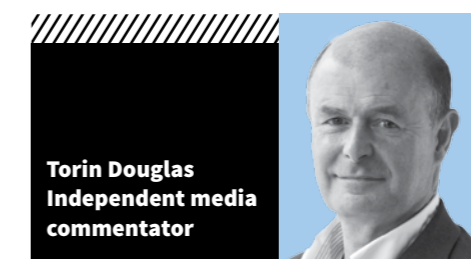
And, separately, law-makers have been trying for years to define the differences between broadcast and online content, since the European Union began amending its Television Without Frontiers policy to reflect the new world.

But it’s not that difficult. Giving evidence to a House of Lords committee in 2006, Martin Stott, then Channel 5’s deputy head of corporate affairs, said “if it looks like television, feels like television and smells like

television then it ought to be regulated by television”.

More recently, the law firm Dentons used a similar phrase, as it noted a trend “for the courts to look beyond technical differences between innovative and traditional broadcasters and distribution platforms, and instead focus on the service offered to viewers.”

As BARB’s Project Dovetail starts bringing together the old and new delivery systems, shouldn’t we be clear what it’s measuring? Television.



Torin Douglas
Independent media
commentator

TV OR NOT TV?

BARB launched a number of innovations last year, including the production of new figures that explore the different ways in which people use their TV screens.

Since Atari launched the home version of a computer game called Pong in 1975, we've all been fairly comfortable with the idea that your TV is not just for watching television programmes. To prove the point, we've continued to plug all sorts of gizmos into our TV sets.

By the millennium, with the digital revolution in full flow and our furniture firmly pointed in one direction, it seemed that this steady accretion of kit would eventually do for TV as a live, or near-live, communal experience. Of course that's still the assumption in some quarters of the digisphere, the latest theory being that the likes of Netflix and Amazon Video will soon govern an internet-connected TV world.

Until now, though, no one has had a detailed fix on what we actually use our TVs for when we're not watching conventional telly. So to plug this gap, we've been able to apply new analytic techniques to BARB panel data since December 2015.

Linear and timeshift TV continues to dominate use of the TV screen but there are a myriad of other uses, some you'd expect and some slightly less predictable. During the period of our analysis, people were watching live or catch-up for just under seven out of every eight hours when using their TV sets: that's 86.4% of TV screen time being devoted to watching TV programmes within four weeks of their appearance in a broadcast schedule.

This leaves an average of just over 40 minutes a day when the TV screen is being used for other activities. Break this out into a new bar chart and we find games and Blu-Ray/DVD

players dominating, with a combined 42% of the action. As you might expect, this picture is even more pronounced for 16-24 year olds who spent an average of 60 minutes a day on other activities on the TV screen; 57% of this was using a games console or a Blu-Ray/DVD player.

But it's the other slices of this subsidiary chart that will attract the most interest from those who believe we're on the verge of a new phase of television. There's quite a chunk of miscellaneous viewing related to the various mainstream distribution platforms. Some will be archived PVR programming, things we've recorded more than 28 days previously; some of it will be box-set viewing and pay-per-view movies.

Equally, some of this will be people accessing TV apps that are distributed by the platform operators. In other words, we're getting into Netflix and Amazon Video territory.

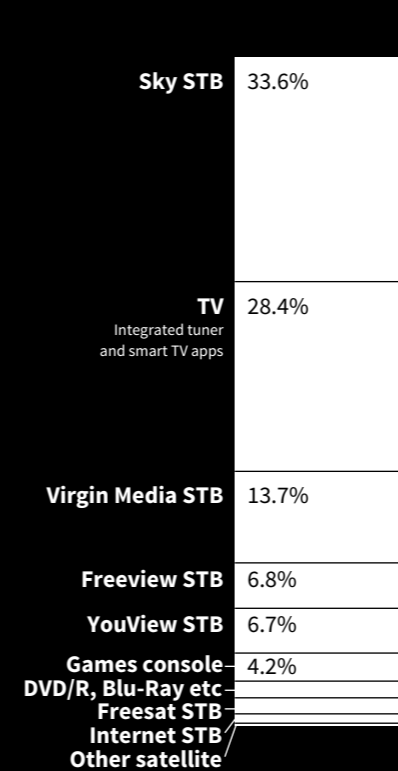
This is even more the case when we look at the 25% chunk designated as TV on our lower graphic. We don't yet have the sort of granular detail we'd like here, but this activity includes (and may indeed be dominated by) people accessing TV apps via smart TVs.

2016 is another important year for SVOD services, with Netflix investing in the creation of 600 hours of original content and Amazon Video investing in Jeremy Clarkson et al. To justify all that investment, both companies have to make major headway in living rooms. Dethroning the market's established players would be a mammoth task, but the data show where one of their most important routes to market may lie.

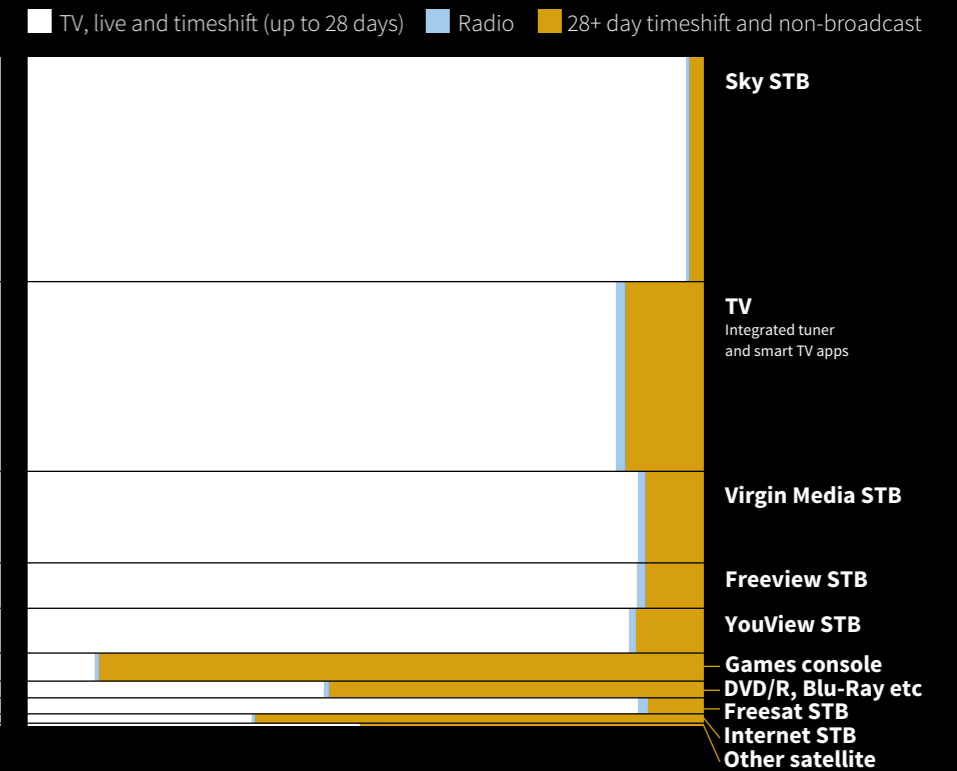
This snapshot analysis may not be completely representative and trends will emerge over the course of this year. Naturally this is something to keep an eye on.

TV SCREENS WERE USED ON AVERAGE FOR 40 MINUTES A DAY FOR ACTIVITIES OTHER THAN WATCHING LIVE OR CATCH-UP TV PROGRAMMES

TV SCREEN USE BY DEVICE

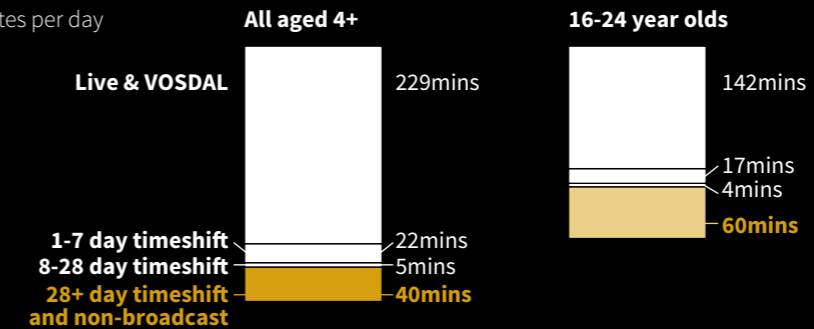


DEVICE USE BY CONTENT TYPE

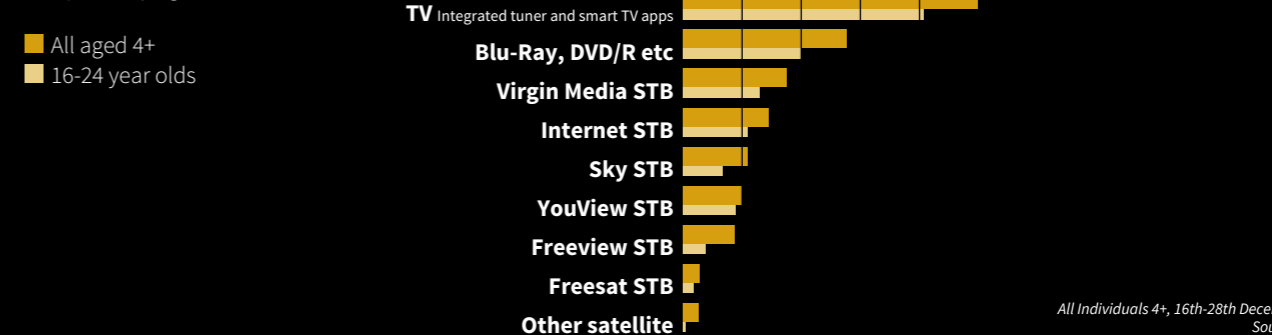


WHAT DO WE USE OUR TV FOR?

Average minutes per day



Breakdown of 28+ day timeshift and non-broadcast use of TVs, compared by age



All Individuals 4+, 16th-28th December 2015
Source: BARB

VIEWING THROUGH TV PLAYER APPS

BARB passed an important milestone in September 2015, when it launched the beta version of the TV Player Report. It's the first joint-industry, audited measure on viewing to online TV.

Since it started appearing on a weekly basis, the TV Player Report has shed light on what's being watched when viewers turn to popular apps such as All 4, BBC iPlayer, ITV Hub, Sky Go and UKTV Play. For the first time, we can now report findings from a deeper dive into the data that we publish each week on our website.

And what's of immediate interest is the fact that tablets and personal computers dominate. Some analysts have been predicting that growth in TV player viewing was going to be driven by people watching on their phones during rush hour but there's little evidence here to suggest that's actually happening.

Only 12% of viewing actually takes place on a smartphone, while less than 10% of viewing takes place between 6 and 10 in the morning. While there's more viewing during the afternoon/evening rush hour, the steady growth in viewing levels throughout the day is more in keeping with traditional viewing patterns on the TV screen.

The only hint of something slightly different is a bump in viewing on tablets during the morning rush hour. That said, the peak is nowhere near what happens during the evenings and at weekends: Saturday and Sunday are the most popular days for viewing while over 40% of all viewing takes place after 9pm. Interestingly, compared to conventional TV viewing, the peak hours of viewing continue later into the night. Are people watching in bed?

It's also interesting to note that while Android competes evenly with Apple for

sales of smartphones and tablets, the latter is more dominant in our measurement of online TV viewing. Whether it is the nature of the user experience or a reflection of the demographics that own devices from the different platforms, it's striking that far more online TV viewing comes through Apple's iOS platform.

Broadly, though, online viewing is clearly a phenomenon still in its infancy. Towards the end of 2015, viewing via TV player apps hit a high point of 855 million minutes during one week. Putting this in context, people spent a grand total of 95.2 billion minutes watching TV programmes on a television set during that same week.

And yes, clearly app viewing will not be evenly spread across the population, as will no doubt be clarified as we derive more granular data. But a glance at the most-watched programmes across the weeks tends to suggest that it won't be clustered in entirely unexpected ways. App viewing, in other words, isn't creating new and exotic programming tastes.

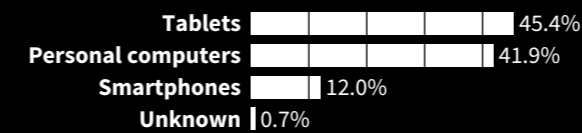
There are interesting nuances to be pursued here, though: Made in Chelsea and TOWIE figure far more prominently than they do in conventional ratings. There are also appearances from programmes that haven't been broadcast as part of a traditional linear schedule. Indeed in recent weeks the top 10 has featured BBC Three programmes such as Cuckoo and Life and Death Row.

The TV Player Report is the first stage of Project Dovetail: go to page 12 for a fuller update.

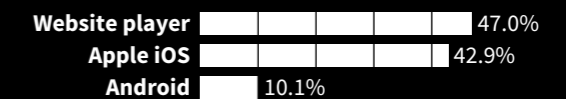
OVER 40% OF ALL TV PLAYER VIEWING TAKES PLACE AFTER 9PM WITH VIEWING LEVELS TAILING OFF LATER THAN ESTABLISHED VIEWING PATTERNS

TOTAL TV PLAYER APP VIEWING

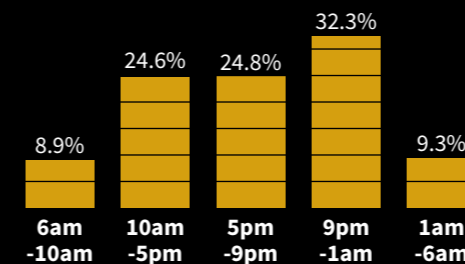
By device



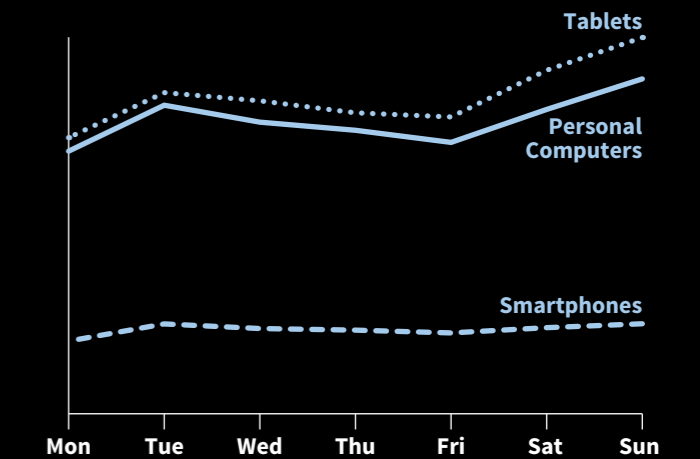
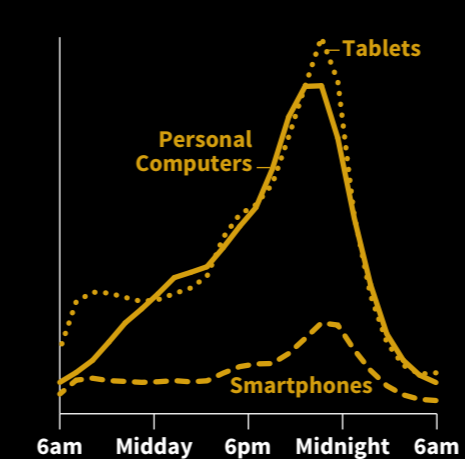
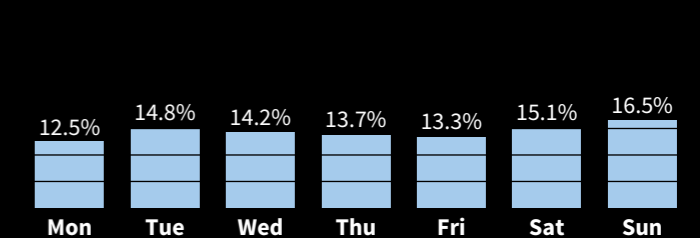
By operating system



By time of day



By day of the week



Aggregate viewing across all audited TV Player Apps, 1st December 2015-31st January 2016
Source: BARB TV Player Report data

UPDATE: PROJECT DOVETAIL

Project Dovetail has become synonymous with BARB's development strategy. The objective is to deliver robust viewing data across platforms and devices.

The strategic context is set by the increasing fragmentation that is brought on by the growth of timeshift viewing, new on-demand services, content distribution through the internet and the advent of dynamically inserted advertising.

Here are six things to know about Project Dovetail.

1 Hybrid measurement is the future.

Collecting data from devices that are used to watch television is a cost-effective way of building large samples. Yet viewing information from devices doesn't tell you who is watching: this limitation is balanced by the strengths of BARB's panel of 5,100 homes. The viewing information collected from our panel delivers programme reach, demographic viewing profiles and measurement of viewers per screen. Project Dovetail will harness the complementary strengths of device data and panel data.

2 Generating census data.

BARB is now collecting data from software code that has been included in TV player apps such as All 4, BBC iPlayer, ITV Hub, Sky Go and UKTV Play. Each software implementation is independently validated and audited before BARB publishes the viewing levels; these are generated from across the whole population, not just from a nationally representative panel of homes. The data are published each week in the TV Player Report and feature on pages 10-11 of this publication.

3 New metrics are needed for online TV.

It's important to report the average duration audience for programmes and commercials to provide comparability with established TV audience metrics. BARB

already reports *average programme streams* in the TV Player Report and plans to start collecting *average ad streams* in the coming months. Each of these new metrics, which have been ratified by JICWEBS, is a measure of device usage, rather than a measure of how many people are viewing.

4 Device data need to be converted into people data.

The hooks for creating a data fusion will come from BARB's panel of homes: we have installed software meters on the personal computers and tablets of over 2,000 homes on our panel. This is generating observations of how people are watching online TV, insight that will be critical to the data fusion process.

5 Data fusion is not straightforward.

While not a new concept, our aim is to provide a fresh data fusion every day. BARB also has to ensure that our chosen method stands up to the scrutiny of the television and advertising industry. To this end, we have commissioned two research agencies to deliver prototypes of their proposed solutions. We expect to complete our review of these approaches during the second half of 2016.

6 Other data sources may be available.

Set-top box data offers similar benefits to the information BARB is collecting from TV players. We don't envisage sourcing census counts from set-top boxes, although working with large samples would achieve a number of objectives; an increase in effective sample sizes, reduction in data variability and providing certainty on the identification of new forms of dynamically inserted advertising. BARB has successfully conducted pilot projects with data from Sky homes and expects to complete further development work during 2016.

RELATIVITY IN A COMPLEX WORLD

We are truly living in the age of complexity from the marketers' perspective.

Client-side guidelines for generalised marketing approaches, once followed remorselessly and, it has to be said, efficiently by most brand owners, have been cast aside. The rules of the road have changed.

As a result, traditional industry specialisms are evolving. From the functional fusion of CMOs and CIOs on the brand owner side, to the collision of offline with online, all exist now at the intersection of data, technology and content.

There is absolute magic to be had in these collisions. And those that forge fruitful connections across silos and agency offerings will win the future, building both campaign traction and brands.

The devil though, is always in the detail. And Joint Industry Currencies, known as JICs, have always been at the centre of what makes sense, and what does not. They are unique and remain pivotal, and have a responsibility to continue to leverage transparent, robust measurement approaches, to keep them fit. They apply both to the trading currency, as well as the insight mining perspective.

And data fusions, such as BARB's Project Dovetail, can only be welcomed, as are supplementary agency driven initiatives such as Dentsu Aegis Network's own CCS-Fusions, that feed deep insight mining.

Simultaneously, we are also truly living through a golden age of TV. Audiences will talk about TV, binge on it, carry it with them on the bus and train to work, force it on their friends, tweet, blog, make fan pages and engage with it with a passion.

There are a plethora of viewing habits, platforms and timeframes for all that content.

Not all of them exist in line with traditional measurement techniques, and not all of them get ratings that would traditionally be associated with the great content of the past. The long tail of programme performance figures has to be seen in this light. Content also of course requires funding, and JICs have a wider responsibility to ensure that good things get renewed and relative value determined.

To round off this holy trinity of trends, we have also entered the world of fragmented personalised content consumption.

Water cooler moments of chatter surrounding anything but big TV events have dissipated. We live in content ghettos and demand varying degrees of personalisation. Whilst this is welcome if you are a viewer, it remains significantly challenging to design communications experiences that feel personal, without them feeling creepy. And we also run the risk of developing content that is invisible to anyone other than whom it was designed for.

As an industry we should support any effort to understand these pockets of content consumption, regardless of platform. We should welcome the chance to connect the dots, and unpack behaviours for the benefit of brand and consumer alike.

And while we of course live in an increasingly device driven world, don't forget the human. It is still, for the most part, people that buy things. Demonstrating how people, not devices, respond to marketing interventions remains pivotal to demonstrating marketing effectiveness.

JICs like BARB of course do not provide all the essentials. Yet their outputs are fundamental building blocks in any assessment of campaign effect and the development of great content.

JOINT INDUSTRY CURRENCIES HAVE ALWAYS BEEN AT THE CENTRE OF WHAT MAKES SENSE AND ARE RESPONSIBLE FOR ENSURING THAT RELATIVE VALUE IS DETERMINED

Tracy de Groose
Chief Executive
Officer, Dentsu
Aegis Network



ONLINE: TOWARDS MEASUREMENT

WE NEED AN OBJECTIVE GOLD STANDARD; THIS WILL TAKE TIME TO WORK THROUGH, SOMETHING AT ODDS WITH TODAY'S SPEED OF MEDIA

I bought my first online campaign in 1996. I made up how to do it.

The site I bought some ad impressions from at the time faxed me over a web trends report of all the files that had been delivered by their web server. I looked for my gif file name and wrote down the number. I was confident this was all correct as quite frankly I had nothing else to go on. At that time there were absolutely no standards on anything to do with online. None.

I had no idea that 20 years later there would follow a whole range of impassioned discussions around a myriad of things such as standardising formats, adserving, measurement, brand safety, fraud, viewability and latterly ad-blocking.

Equally I had no idea that bodies like the

IPA, IAB and ISBA would have spent the last few years huddled together in rooms trying to establish cross-industry, cross-body, cross-border rules about what constitutes the base level of measurement standards and expectation, without getting everybody cross.

The UK is now the most advanced market in the world based on share of advertising spend aligned to digital platforms and, I would argue, the most advanced when it comes to intuitive media planning and buying. To the people involved in the everyday planning of ad activity across the everyday three-screen digital world of desktop, tablet and mobile, video is an ever increasing part of everyday life.

But of course it's not just a three-screen world, as TV is and will continue to be the big brother for some time yet.

However, while we are advanced we're not very well joined up; well, certainly not as joined up as we're going to be. There are technical and territory-protecting reasons for this, as well as a whole bunch of stuff to learn about cross-platform planning and evaluation.

The recent broadcaster developments in partnering with bits of digital tech are to be applauded, but the holy grail of cross-platform understanding and optimisation at a granular level is very difficult. We're all playing with probabilistic and deterministic modelling, which is a struggle to say let alone do, and we're all trying to get better at it at pretty much exactly the same pace.

OBJECTIVE

It's also a reality that media-neutral planning doesn't really exist, as planners and clients all have their personal biases. Business models, both agency and media owner side, can place false restrictions on true neutrality based on their own agendas.

However, there is at the most basic level of media planning still a need to understand audiences, reach and frequency alongside confidence of delivery and associated costs for that validated delivery. But we're not quite there yet.

And whether you like it or not we have to deal with the consequences, and opportunities, that the greater level of granular data digital activity gives us to plan, buy, learn, twist and turn. But as we're seeing, the paradox of this detail is that it's also telling us some quite painful, meritocratic truths: smart trumps clout.

I used to be frustrated that TV could only be bought against audiences that increasingly seemed too blunt. But maybe I was alone in that as I've basically never met a client who didn't want to be on the telly; and I can't say that about digital advertising.

However relatively simplistic the targeting, advertisers like TV; in fact they like it a lot. And part of that has to be about confidence of the delivery, robustly and independently verified. It's a good lesson to take note of.

But regardless of platform, size of screen, the cleverness of the adserving tech used, the microscopic data all this investment creates,

and the various trade bodies shouting their medium's worth, we are firmly in an age of video. There is no going back, which is great.

So where now?

It's an agency's job to give their clients leadership, to act with agility with increasing speed. Clearly many will have their own opinions, but one of the things I believe we need in this video-led world is a snippet of commonality.

It's an opportunity for a solid, objective view on the whole video-led market and this is where a body like JICWEBS plays a crucial role to agree a gold standard. It's also where something as trusted as BARB can too.

These things take time to work through, something at odds with today's speed of media, but the time investment is needed to get this right. And crucially it still allows agencies, tech players and media owners to embellish, to apply their own special entrepreneurial flair and ideas; which is, after all, how we've gone from faxing nearly pointless numbers all those years ago.

Pete Robins
Founder, agenda21
and Chairman, IPA
Digital Media Group



A PROGRAMME MAKER'S VIEW

Q&A with Dan McGolpin, Controller of BBC Daytime and Early-Peak

You've worked in channel management roles for 15 years. What's the biggest change that's happened in that time?

It's tempting to think that the biggest changes have been in the way that people watch and the devices they are using, that it's gone online, mobile and so on. But the biggest change was simply the explosion of choice in the multi-channel era, going from five channels to hundreds of them.

Now of course there are services that no longer look like channels in the traditional sense but given this explosion of choice in what's available, it's remarkable how resilient the traditional broadcasters have remained by attracting viewers through a wider range of programmes across their portfolios. Also, the most popular programmes, such as The Great British Bake Off, can still unite huge audiences for a moment in time.

How do you think the attitude of programme commissioners to audience measurement has changed? Why is that?

I think they recognise that audience measurement has become more complicated because viewers can watch across a greater timeframe and on an increased number of devices. After a programme is first broadcast you now need to wait a week to obtain an accurate level of viewing rather than finding out the full picture by the following morning. For some genres, namely drama and comedy, the difference a week later can be quite dramatic, especially where younger viewers are concerned.

Online viewing is harder to measure than recorded viewing and although it's not huge currently in overall percentage terms, it's becoming increasingly important for some audiences. The danger is that people ignore online viewing in the decision-making or



Dan McGolpin
Controller of BBC Daytime
and Early-Peak

start contrasting apples with pears through different measurement systems. This is why what BARB is doing is so important because BARB can help to simplify measurement across platforms and time periods – that's what we need.

How much do BBC commissioners use the new BARB data such as the TV Player Report in their commissioning decisions?

I couldn't say that it's had an influence on commissioning decisions, yet. People have got used to the internal ways of measuring

online viewing but I think that the TV Player Report will become increasingly useful. Being able to look across the industry at data that you can rely on to be robust, comparable and consistent will become really important and BARB can bring together leading broadcasters and media agencies to ensure a common approach. The TV Player Report will also become increasingly useful in its next phase of development when the data are integrated with the rich demographic detail of the BARB panel. We need comparable metrics that we can trust.

If you could ask for one single form of measurement to be top of BARB's development list what would it be and why?

It would be measuring subscription video on-demand (SVOD) services. They are commercial organisations and it's up to them what data they'd like to share but I think that a transparent cross-industry approach to audience measurement should be encouraged so that we can all understand to what extent audience behaviour is changing and how quickly.

In an age when major proprietary datasets are created and available, how important is it to have joint-industry measurement systems?

Proprietary datasets can provide a lot of insight for particular businesses but we also need a robust audience overview of the industry. We know we can trust BARB. It has high standards and robust research approaches which have been emulated around the world.

Tell us about your live+7 and underserved overnight reports and how they sit alongside BARB.

These are BBC reports that we use internally for editorial conversations and each is grounded in BARB data but designed to supplement the overnights. The BBC's

WE KNOW WE CAN TRUST BARB: IT HAS HIGH STANDARDS AND ROBUST APPROACHES THAT HAVE BEEN EMULATED AROUND THE WORLD

underserved overnight report provides a colour-coded illustration of how shows are reaching different audience demographics so that we can see which programmes are the most effective at attracting audiences who tend to watch less of the BBC than other groups. The live+7 report offers a total audience figure for each programme encompassing four sets of data: live and viewed on same day as live (the overnight), recorded playback across the week (consolidated), narrative repeats and iPlayer viewing.

Looking at your first year in this role, what programme have you brought to our screens that you're most proud of and why?

I'm very proud of Food: Truth or Scare, because what we eat is so important for the health of the nation but the advice that people receive can often be confusing and contradictory. Increased levels of obesity and diabetes are worrying trends and in this series I think we gave viewers a lot of useful information. We were able to put some of the scientific data in a context that can be hard to convey in individual news reports. This was done using a very accessible tone that meant people could enjoy watching a programme about healthy-eating.

What three qualities do you need to be a good commissioner?

Audience empathy, creativity, focus.

What's the biggest programming risk you've ever taken?

The Voice UK, which recently completed its fifth and final series on the BBC. When we commissioned it to play in the peak-time Saturday night schedule on BBC One there was a huge amount of press interest. Many people thought that it would struggle alongside other more established shows but it's been one of the biggest entertainment hits of recent years.

SMALL SHIFTS IN TIMESHIFT

Year after year, perhaps unsurprisingly, we're watching slightly more timeshifted TV: the 7-day figure was 13.2% in 2015 compared to 12.3% in 2014.

And the demographic breakdown proves yet again that it's the busiest people who do it most. Busiest or, in the case of children, those subject to other time pressures, like parents telling them it's time for bed.

But by and large, the most avid viewers of recorded TV programmes are those who have a life outside the home: adults between the ages of 16 and 44, with a pronounced peak in the 25-34 banding.

These are people who, if they're not working late, are out and about on the town. And as ever there are some interesting regional variations. Bottom (or top, depending on your point of view) of our table is the Ulster region. A foolhardy social anthropologist might conclude from this figure that there's not much to do in Northern Ireland aside from watching live telly. There are similarly low levels of timeshifted viewing in Wales, Scotland and the Border regions.

We believe the levels have more to do with commuter patterns and work life balance issues: those low timeshift viewers in Ulster, Wales, Scotland and the Borders are probably enjoying all the benefits of living away from the cities. The biggest timeshifters are Londoners and those in the south and south-east, many of whom are often forced to spend long hours at work sandwiched between soul-destroying long commutes.

Where timeshifted genres are concerned, there's clear evidence again this year that we're a nation that stockpiles soaps and other forms of popular TV drama. It's also worth noting that, though children watch a lot of timeshifted TV, kids TV isn't a big timeshifted genre. So, in all probability, kids

are actually contributing to the high figures for soaps.

And again, fairly obviously, sports, news, weather and current affairs are down at the bottom of the table. Half the fun of participating in a big sporting event is the notion that you're playing your part, however vicariously, within a wider community beyond your living room. And there's another ontological factor in play here too.

Even if you manage to avoid discovering the final score of, say, a football match, you can never successfully timeshift the outcome anxiety that adds spice to a sporting event. Similarly, watching old news is surely an acquired taste.

Lastly, our graph of kit uptake reinforces a notion we discussed in last year's report: that the percentage of people living in a PVR household seems to be hitting a plateau at around 75 per cent.

In some senses, this is counter-intuitive. After all, historically speaking, if a piece of household hardware becomes popular (breaking, say, the 50 per cent barrier), then it tends to go on to become universal.

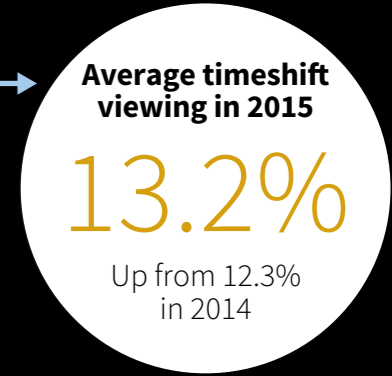
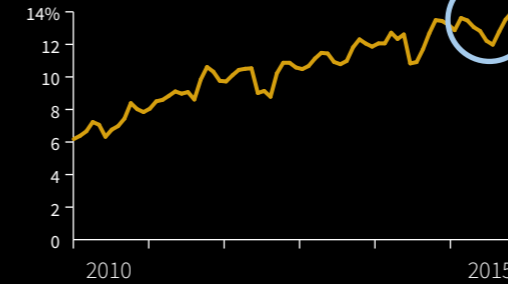
Underlying the anomalous PVR adoption curve is that its slowdown is being determined by both technophobes (who like a bit of telly but have found other ways of catching up with their favourite programmes) and technophiles, who presumably see PVRs as already rather passé.

But whichever way you explain it, the PVR refuseniks add up to a quarter of the population: an intriguingly large chunk of the market. One way or another, different players in the market will see opportunities here.

THERE IS CLEAR EVIDENCE THAT TIMESHIFTING IS LINKED TO TIME POVERTY AND WORK LIFE BALANCE

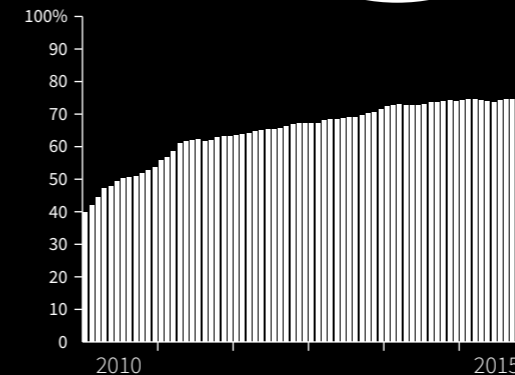
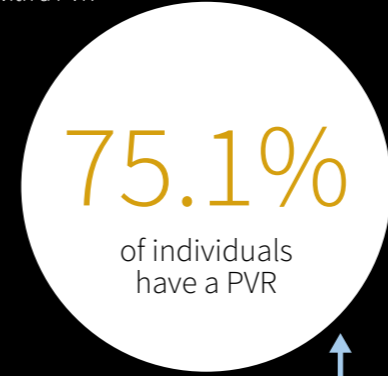
WE CONTINUE TO WATCH MORE TIMESHIFTED TV

% timeshift viewing

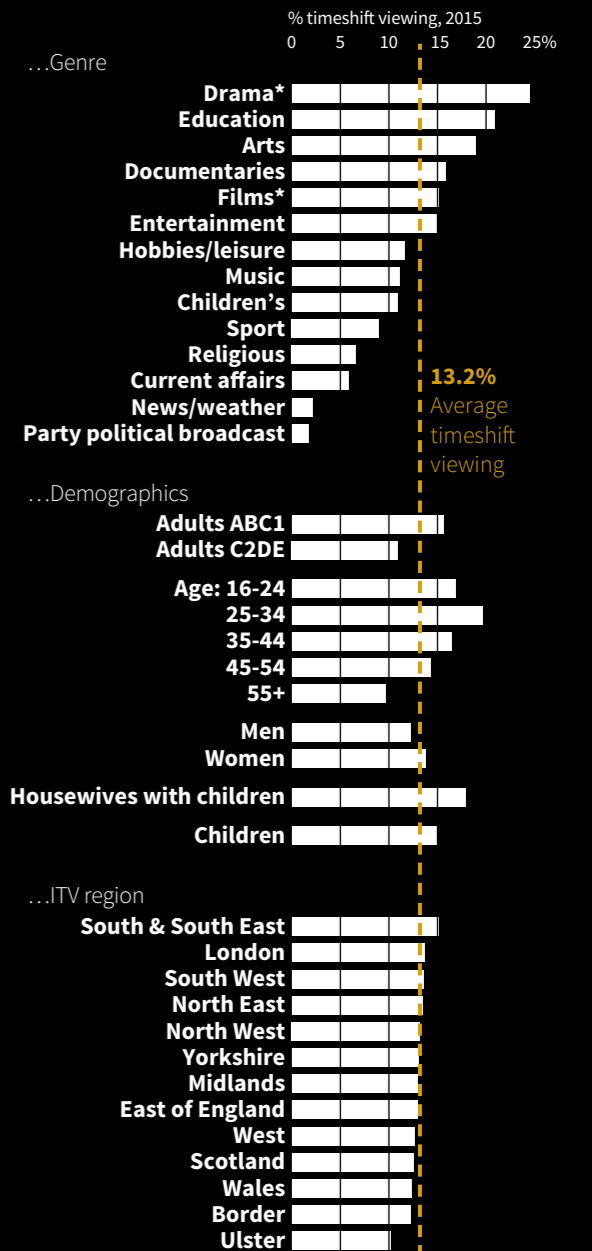


PVR ADOPTION PLATEAU

% of individuals with a PVR



TIMESHIFTING BROKEN DOWN BY...



*Drama includes series, soaps, single plays; films include cinema, TV and other Source: BARB

HERE IS THE NEWS

Those among us of a cynical disposition will feel chastened by a perusal of these genre figures. There is nothing, say some, more likely to put you off current affairs than a General Election.

Well, they're just plain wrong. We went to the polls on May 7th last year. Did this inspire the great British public to prove its indifference by watching more soaps and general entertainment programmes? No, it did not.

News as a genre was up 0.4 of a percentage point in the share figures. This may seem rather negligible on its own, but look also at this: documentaries up 0.7 of a point; current affairs up 0.3. And if you suspect this reflects a dumbing down process at the major broadcasters then think again.

Because we also watched stuff cobbled together by the dullest and most incompetent broadcasters on the planet: the politicians themselves. From the official start of the election period until Polling Day, over 25 million people watched a Party Election Broadcast. And of the top 2,500 programmes last year, 599 (24%) were news bulletins. In 2015, over 40 million people each week watched at least some TV news: that's 70% of people in TV households. If anything is going to make you proud to be British, then this is it.

To cap it all, look at the share commanded by entertainment programming. Though we hesitate to posit any simplistic mechanism of cause and effect here, it's worth noting that this genre was down half a point last year.

This is the programming department most at the mercy of waxing and waning fashions. It's also the one most subject to scrutiny along the top-floor corridors of broadcasting power. The reckoning being that if you win here you win big, especially on a Saturday night.

But entertainment's share of viewing is yet to replicate the high point of 19% it achieved in 2013. Suffice to say, we've reached a point in the cycle when viewers seem to be tiring of one or two formats.

Also feeling the pinch last year was sport, down two points. This will cause only a moderate outbreak of fingernail chewing. Like entertainment, sport on TV is subject to cyclical effects, but they're more regular and predictable: in short, even-numbered years are always best, offering, as they do, either a summer Olympics or a football World Cup.

Last year, our keynote sporting event was England's embarrassingly early departure as host nation in the rugby union World Cup. 2016, with its carnival Olympics in Rio and European football championships should be better.

It's also worth noting the continuing ratings demise of cinema films as a television genre. Blockbusters are still terrifically important to television as a business, but they're subscription and pay-per-view revenue drivers rather than a ratings bellwether. These days, all the good stuff airs first on dedicated film channels that, by definition, draw small but perfectly-formed audiences.

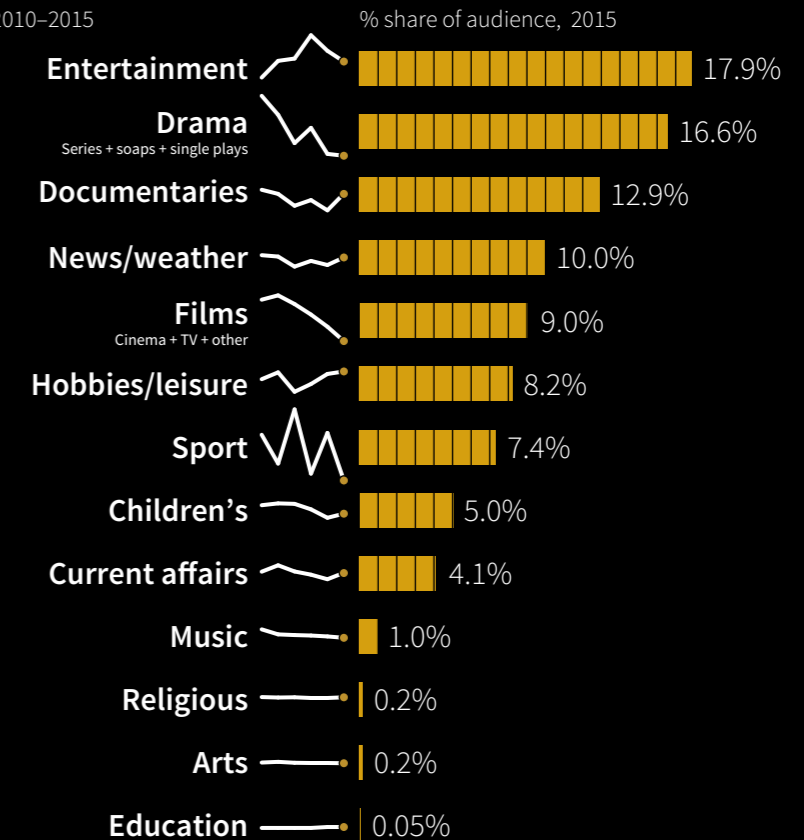
And finally, in last year's report we bemoaned the seemingly inexorable decline of children's programming. We attempted to argue that this genre was the industry's coalmine canary: its health tends to be indicative of the medium's faith in its own future.

Treat your youngest audiences with contempt, so the argument runs, and they'll repay the compliment somewhere down the line. So it is with pleasure that we can report this genre's performance in climbing, albeit by 0.1 of a percentage point.

NEWS BULLETINS
ACCOUNTED FOR
NEARLY ONE
QUARTER OF
THE TOP 2,500
PROGRAMMES
IN 2015

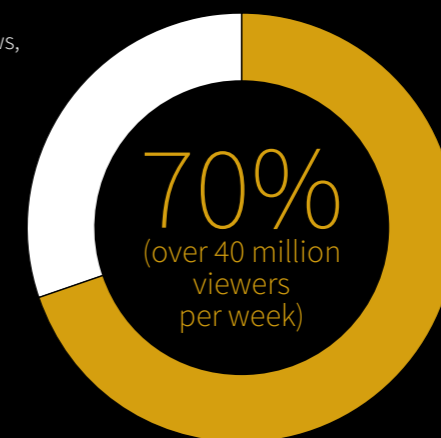
THE GENRE RANKINGS

Trend in % share of audience, 2010–2015



% OF PEOPLE WATCHING TV NEWS

People in TV households who watched at least three continuous minutes of TV news, 2015 weekly average



Source: BARB

SHARING FAMILY VALUES

As ever, the underlying story here is one of continuity: the top four places in our table are pretty much as they were last year, give or take a fraction of a percentage point here and there.

Viewing, in other words, is still dominated by the established channels formerly known as the terrestrials. For instance, almost 37% of all viewing is accounted for by BBC One plus ITV; and the first five channels on the EPG take more than 52% of total audience share.

Both of these aggregate figures are actually up year on year: a notable performance during what is, supposedly, such a volatile era in the television industry.

But there are some fascinating evolutionary stories here too. Last year, we referred to speculation that BBC Three might soon become an online-only brand. Well, we need speculate no longer. Earlier this year, back in February, the channel departed from programme guides and became a brand distributed exclusively via the BBC iPlayer.

Will its audience follow it online, explore different BBC offerings, or drift off somewhere else? There has been much speculation about the wisdom of this strategy; one way or another it's going to provide food for thought and material for a case study or two.

ITV may also be in two minds about the figures here. In recent years, as a group, it has been very successful in managing its high-profile programme brands across a portfolio of channels, compensating for audience pressures on its flagship channel with gains across the family as a whole.

This year, there's a slightly different story underlying these figures. ITV, the channel, is up year on year, which is no mean achievement in the current marketplace. At the same time, its portfolio properties

gathered under the other heading (the likes of ITV4 and Encore) have seen their share decline.

The Channel 4 family had a good year in terms of awards and critical acclaim: and it reaped the rewards in ratings terms, with yet another reassuringly steady performance at number three on our rankings.

Meanwhile, in mid table, Sky continues to perform solidly, slightly up year on year. Similarly, UKTV and Discovery have gained ground with share increases of 0.1 and 0.2 percentage points respectively.

A big story can be seen following Viacom's acquisition of Channel 5 from Richard Desmond's Northern and Shell. The enlarged Viacom family features an impressive portfolio of established brands like MTV, Comedy Central and Nickelodeon; and the addition of Channel 5 enabled the group to capture an 8.2% share at number five in the table. Viacom recently stated that it sees significant potential for audience growth at its new UK flagship channel, so the forthcoming battle with its mid-table rivals will be fascinating.

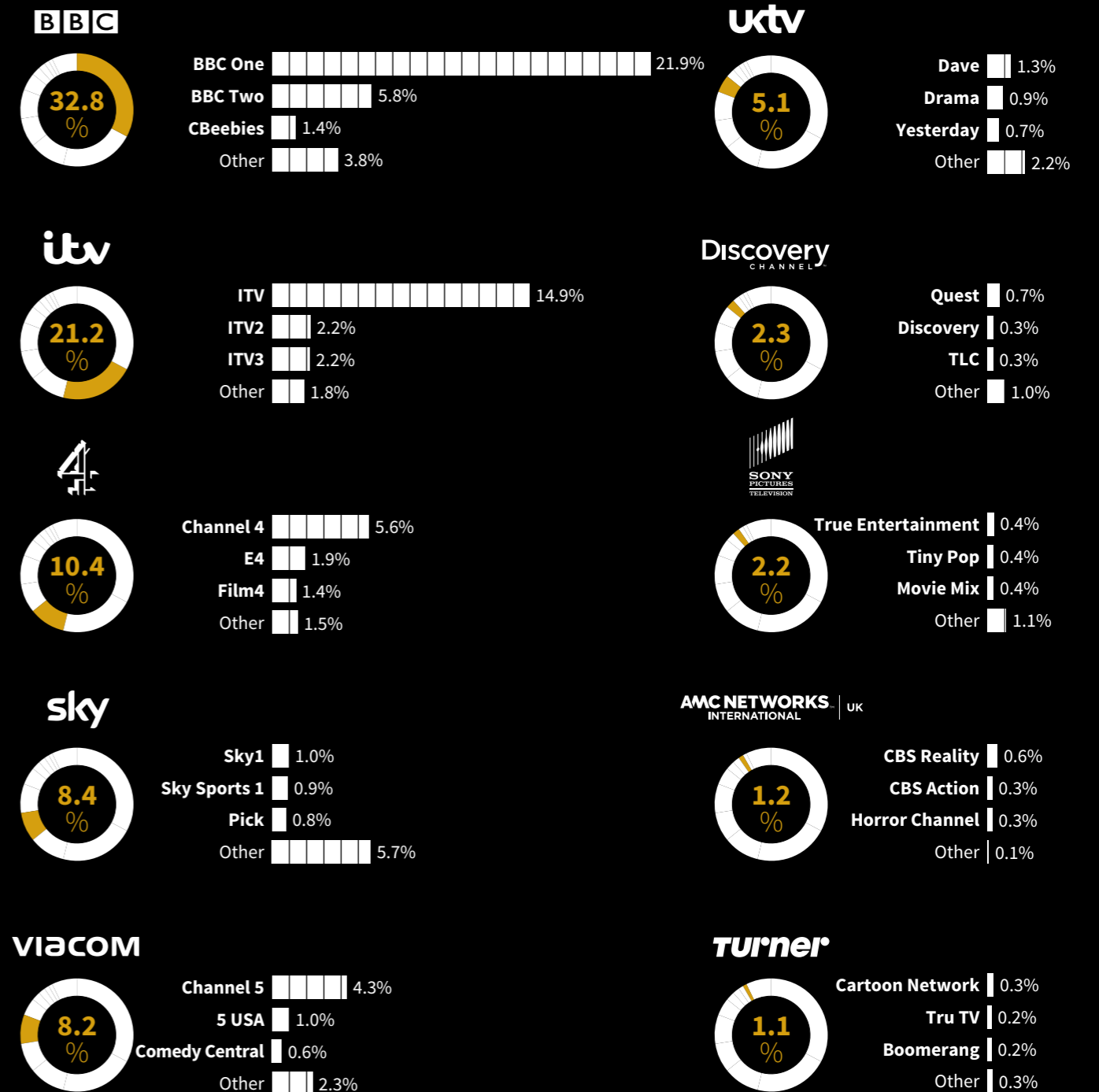
Changes in ownership also explain one of the new entries in the lower reaches of the Top Ten. Sony Pictures Television comes in at number seven, thanks largely to its acquisition of CSC Media Group with its eclectic mix of music, general entertainment and children's channels.

Also appearing for the first time is the portfolio of channels managed in a joint venture between CBS Studios International and AMC Network International (formerly Chellomedia). And lastly, it's also worth acknowledging the re-entry, at number ten, of the Turner family of channels, which narrowly missed out on last year's chart.

THE FIRST FIVE CHANNELS ON THE EPG CONTINUE TO TAKE OVER 52% OF TOTAL AUDIENCE SHARE: A NOTABLE PERFORMANCE IN SUCH A VOLATILE ERA

TOP TEN BROADCASTER GROUPS

% share of audience, 2015



Where applicable, channels include HD and +1 variants. Channel share within family may not add up due to rounding. Source: BARB



Last year BARB launched IPA-accredited training sessions to help those in the media and advertising industries get the most out of our data.

The two hour Boot Camp module offers an overview of the BARB panel, how it works and how the data are collected. There is also input from broadcasters, schedulers and advertisers on how the data are used. Whether you are new to the industry or just need a refresher, this module is the perfect opportunity to ask questions and get to know BARB.

So far over 350 people have attended and we thank them for their enthusiasm and feedback. Here is what some of them had to say:

“ I thought that the content was very fresh, which made it very easy to relate to ‘real world’ scenarios.
Media Planner, PHD Media

“ It was a great cover of what BARB does and how it works, especially for someone who doesn’t know much about it! The last part on Project Dovetail was particularly useful.
Broadcast Assistant, Total Media

We are also launching a more advanced training session called BARB Reboot. This will go into more detail about our data and help you explore their potential.

These courses will not only help you get to grips with how the BARB data work but also why they are so valued in our industries.

“ BARB data underpin some £5 billion of television trading. As the medium and the measurement become ever more complex it is essential for users to keep on top of the basics. These courses will ensure that users understand the accountability BARB provides and appreciate what it takes to create a gold standard.
Lynne Robinson, Research Director, IPA

Boot Camp sessions are free and held at our offices in central London. Last year we also ran private workshops in Manchester, Edinburgh and Belfast.

To book a place or receive more information, please contact Client Services: sarah.mowbray@barb.co.uk



Thank you for reading The Viewing Report 2016.

If you have any questions or would like to know more about other reports from BARB, please contact charlotte.martin@barb.co.uk.

There is also plenty of information on our website, which has recently been freshened up and enhanced for viewing on tablet and mobile devices.

In the *About us* section of our website you can also find contact details for all members of the BARB team.

To keep up to date with BARB and the latest reports, follow us on Twitter and LinkedIn or request to be added to our *What’s new from BARB?* mailing list.

We hope you have enjoyed reading this report and we look forward to your feedback.

www.barb.co.uk

enquiries@barb.co.uk

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The Joint Industry Currencies are unique.

The industry created them to provide audience numbers and trading metrics for each advertising medium.

They are owned and developed by the communications industry. Advertisers, agencies and media owners work in concert to deliver one, credible and objective trading currency for each medium.

As well as creating the standard metrics that serve as the bedrock for evaluating and trading advertising media, the Joint Industry Currencies also provide critical inputs that enable advertisers and their agencies to understand the effectiveness of cross-media marketing campaigns.

How they are built and how they work is open to scrutiny – they are transparent in what they do. The currencies are the most robust and comprehensive datasets available. Each is produced and offered at cost, delivering unrivalled value for money.

The UK Joint Industry Currencies are ABC, BARB, JICPOPS, JICREG, JICWEBS, PAMCO, RAJAR and ROUTE.

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