The Future of TV (and how we measure it)

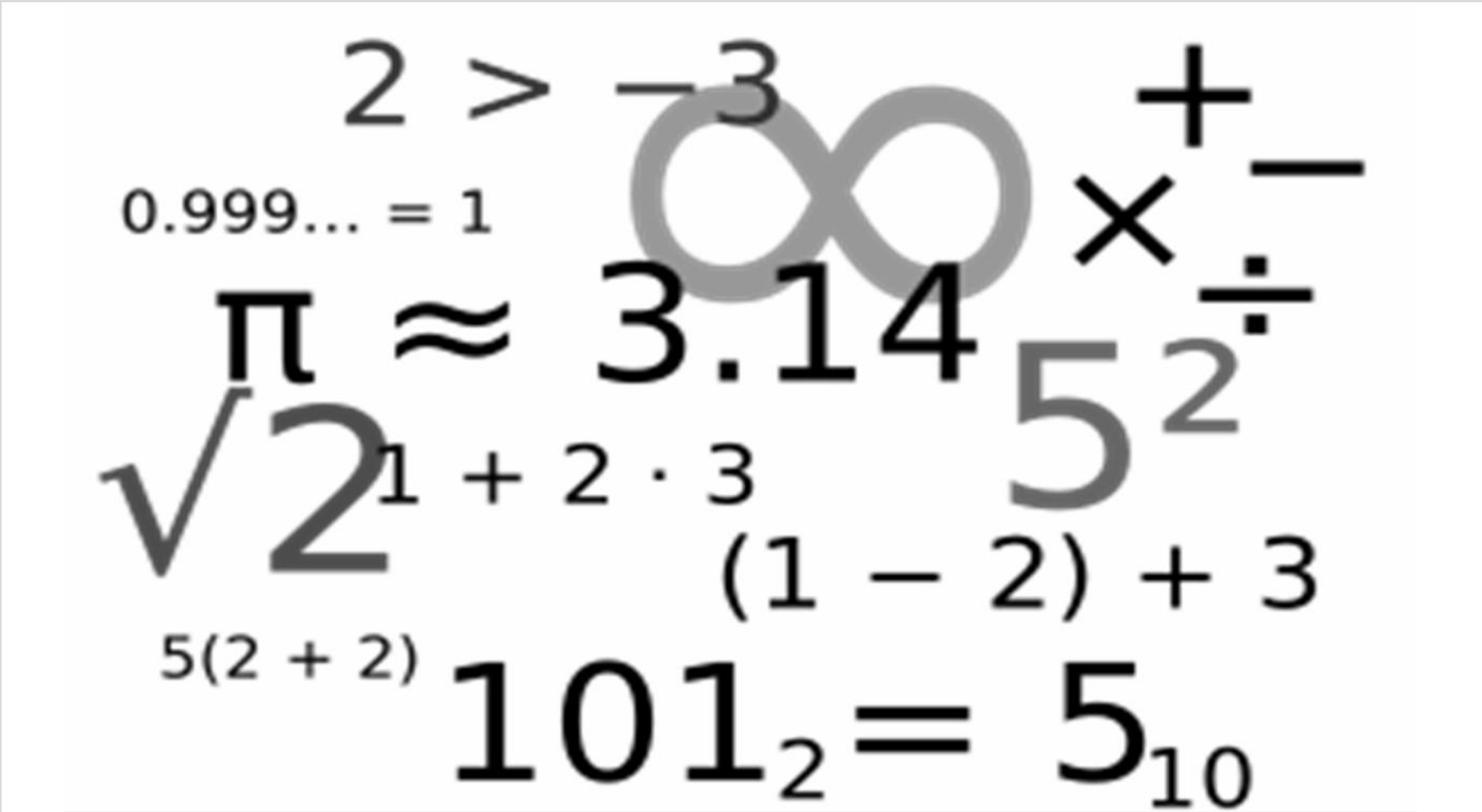
November 2014

asi

The 2014 European Radio & Television Symposia
will be held in Madrid, Spain
5th–7th November

BBC | Marketing & Audiences

In fact…


$2 > -3$
∞
$+$
$-$
$\times$
$\div$
$0.999... = 1$
$\pi \approx 3.14$
5^2
$\sqrt{2}$
$1 + 2 \cdot 3$
$(1 - 2) + 3$
$5(2 + 2)$
$101_2 = 5_{10}$

Plus…

To recap....

Faced with a multitude of ways of finding and accessing television content, how do audiences find their way to content and how might that change in future?

The approach

1st stage:
61 audience safaris – mixture of mainstream and emergent behaviours (e.g. online only, on the go viewing)

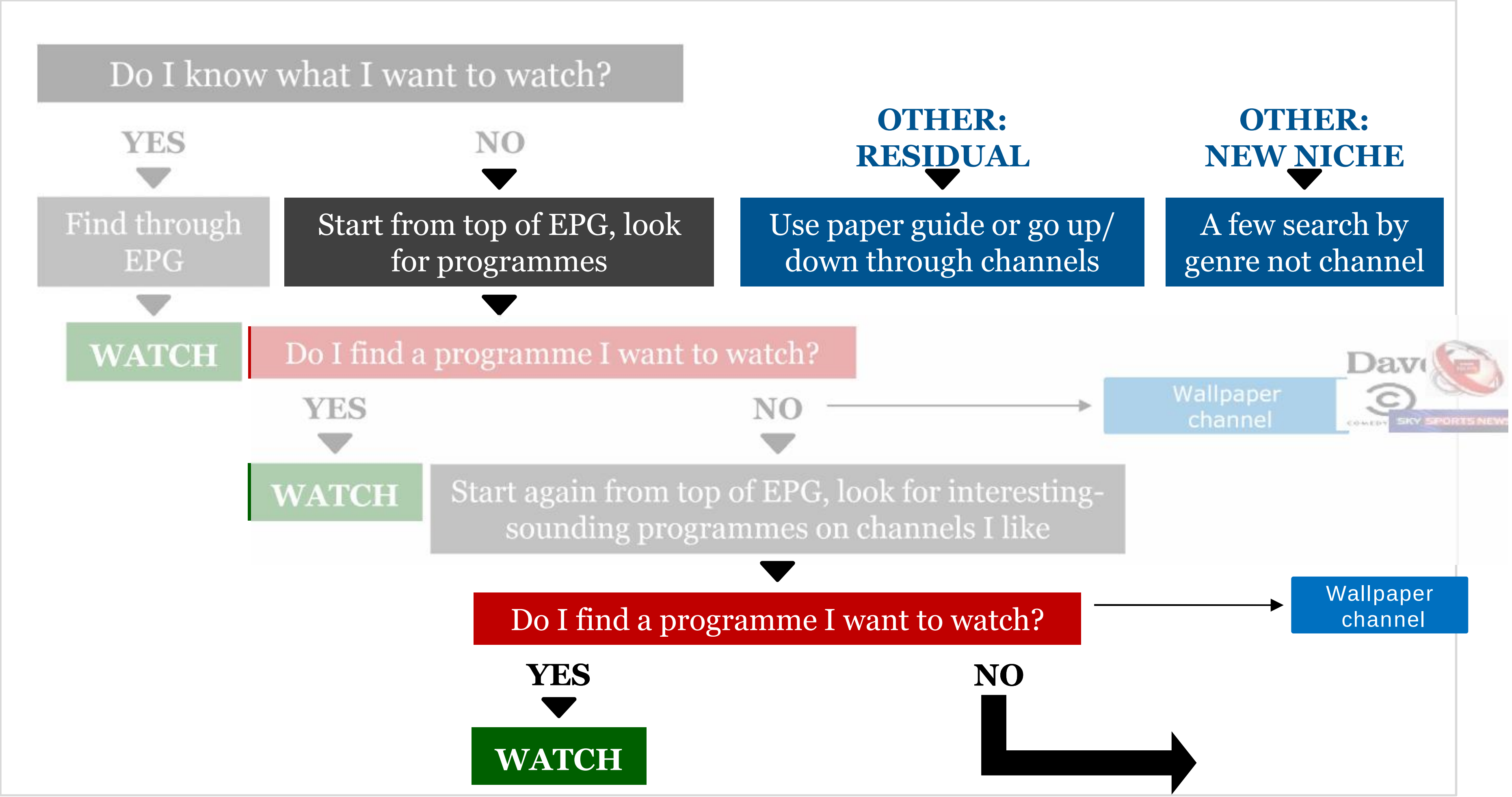
2nd stage:
2606 online interviews to quantify qualitative findings– 2 day TV diary and exploration of search and viewing behaviour

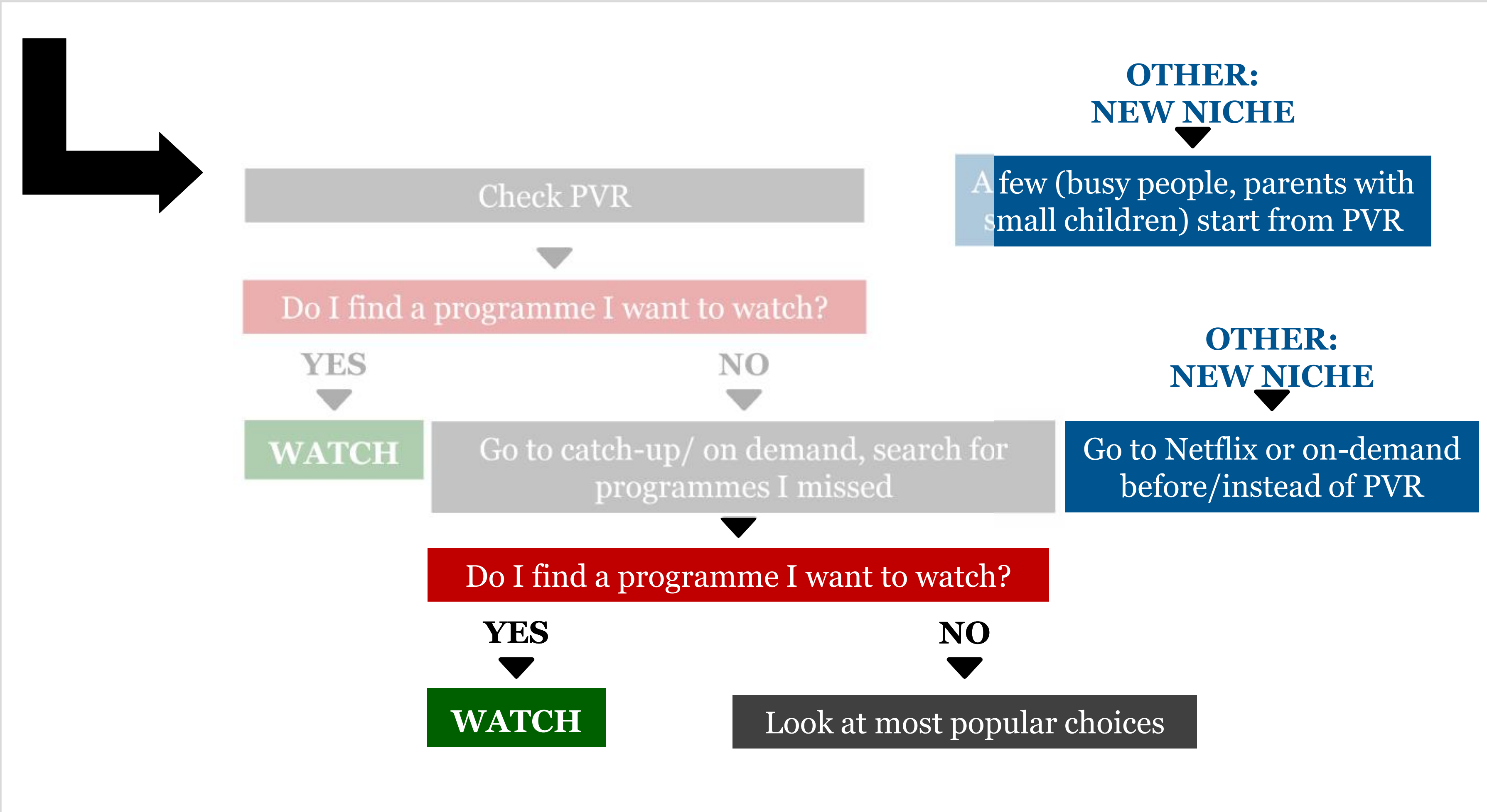
Leveraging behavioural economics – as a technique and analysis tool – to get at the sub-conscious drivers of behaviour. This involves a combination of observation followed by in-depth questioning.

The general Behavioural Economic perspective

Rationalistic view	**Behavioural Economic view**
Abstract reasoning	Embodied, interactive reasoning
Focused, sustained, high-involvement processing	Partial, shifting, low-involvement processing
Conscious information processing is the norm	Unconscious processing is the norm
Seek best solution however long it takes	Settle for 'good enough' to save time/ effort
Recall of information	Recognition of presented cues
Individual in isolation	Individual subject to social urges and influences
Choice tasks addressed and solved directly	Choice tasks broken down into simpler proxy tasks

There was a very dominant behaviour pattern observed…


Do I know what I want to watch?
YES
NO
OTHER: RESIDUAL
OTHER: NEW NICHE
Find through EPG
Start from top of EPG, look for programmes
Use paper guide or go up/ down through channels
A few search by genre not channel
WATCH
Do I find a programme I want to watch?
YES
NO
Wallpaper channel
WATCH
Start again from top of EPG, look for interesting-sounding programmes on channels I like
Do I find a programme I want to watch?
Wallpaper channel
YES
NO
WATCH


OTHER:
NEW NICHE
A few (busy people, parents with small children) start from PVR
Check PVR
Do I find a programme I want to watch?
YES
NO
WATCH
Go to catch-up/ on demand, search for programmes I missed
OTHER:
NEW NICHE
Go to Netflix or on-demand before/instead of PVR
Do I find a programme I want to watch?
YES
NO
WATCH
Look at most popular choices

On the vast majority of occasions people know what they want to watch

Do I know what I want to watch?

YES
82%

WATCH

NO
18%

1st Search

They know what they want to watch because they want familiarity and they like habit & routine

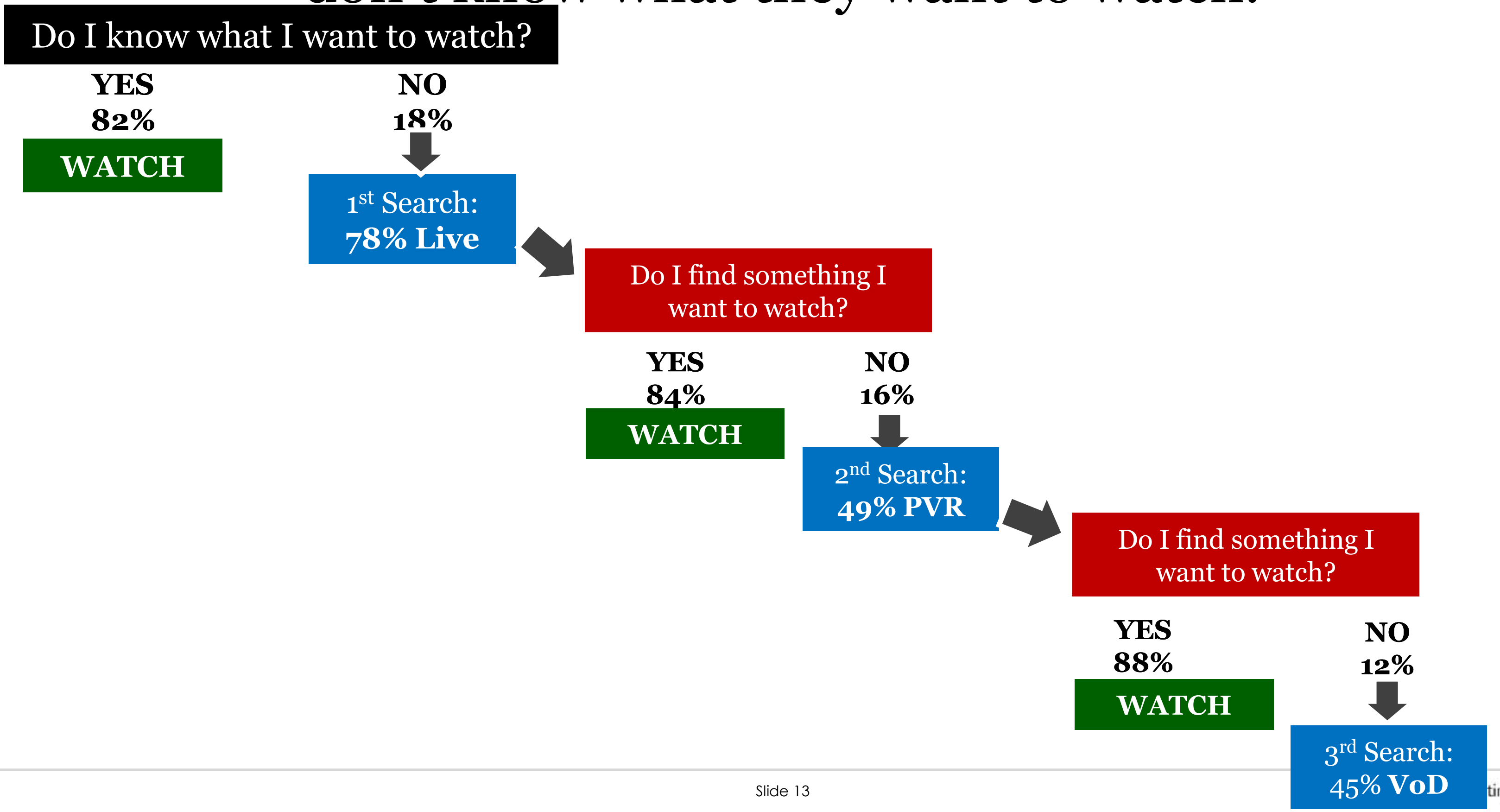
Of those live occasions when viewers know what to watch,

79%

of them are because they **always watch it at that time**

- The schedule is part of their routine and engrained to memory
- It aids relaxation by getting viewers to the content they want easily or by providing direction as to what to watch

Scheduled content still drives the first search for those who don't know what they want to watch.



The EPG was critical in the search

67% of all TV browsing is via the EPG

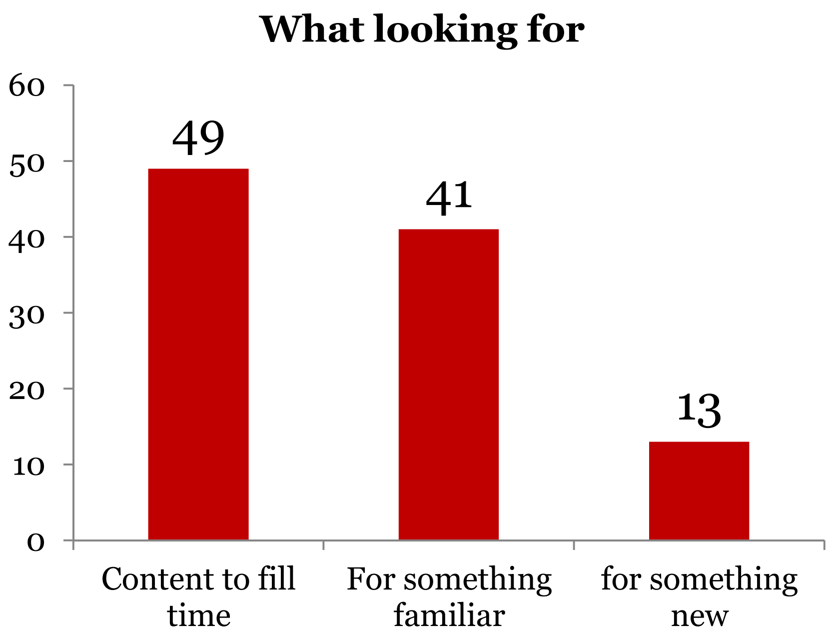
- 39% for 5-10 year olds

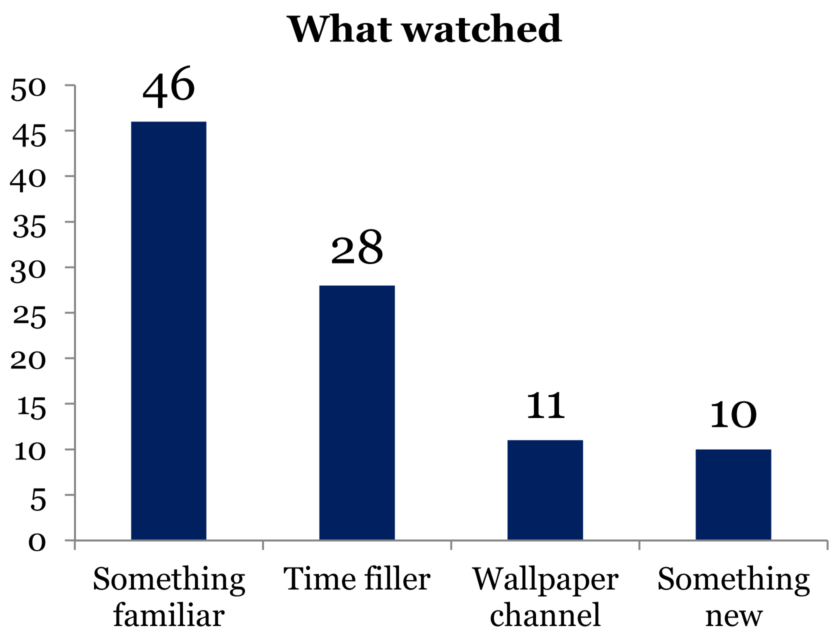
- 47% start searching at the top of the guide

- 50% of viewers pay most attention to channels they like/tend to watch

When searching, familiarity is key

An existing schedule takes less time and effort than self-curating





It was very similar for young audiences…

Do I know what I want to watch?

YES 75% → WATCH

NO 25% → 1st Search: **73% Live**

Do I find something I want to watch?

YES 78% → WATCH

NO 22% → 2nd Search: **32% PVR** **22% VOD**

Do I find something I want to watch?

YES 93% → WATCH

NO 7% → 3rd Search: 49% **VoD**

Most of the time what they want to watch, and end up watching, is live

75%

of all viewing occasions are live (at the point of broadcast)

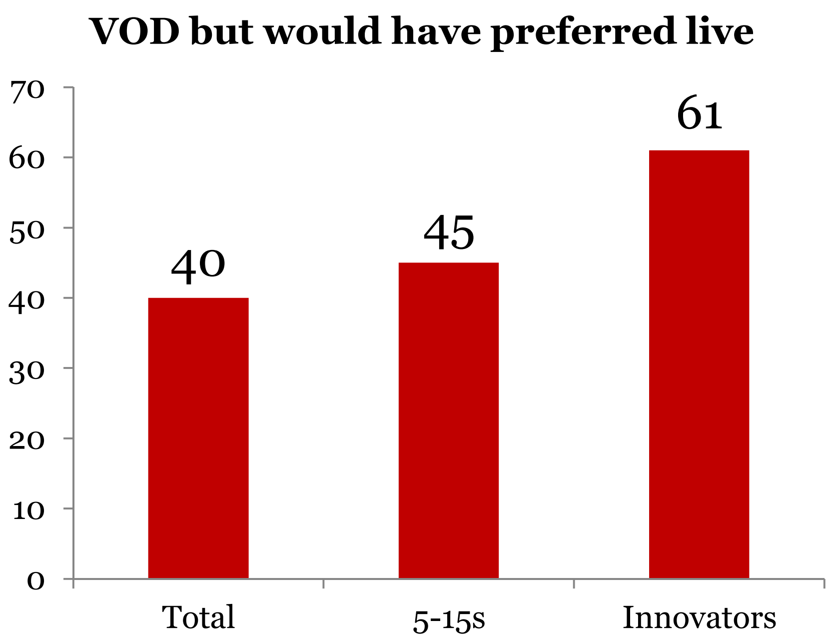
18%

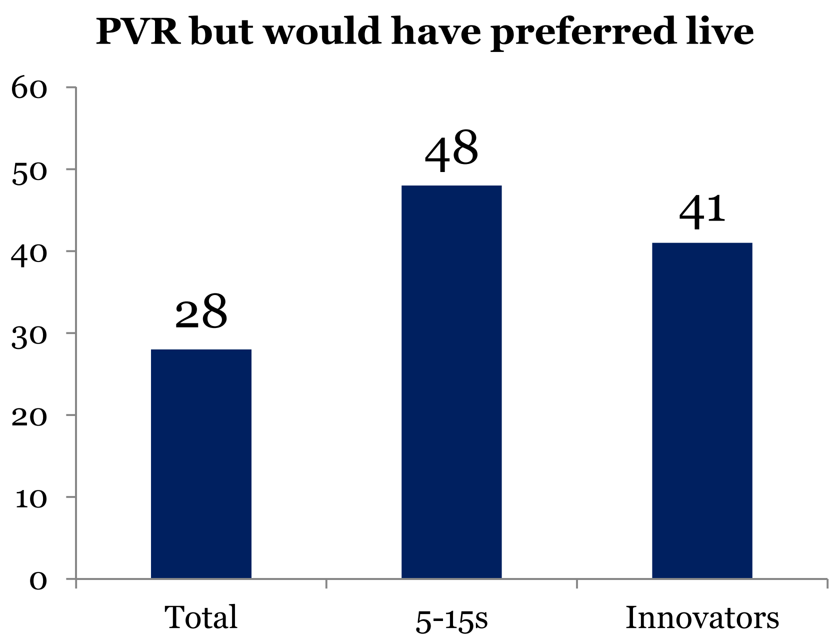
of all viewing occasions are recorded

3%

of all viewing occasions are free VOD

Live viewing is in fact the preference

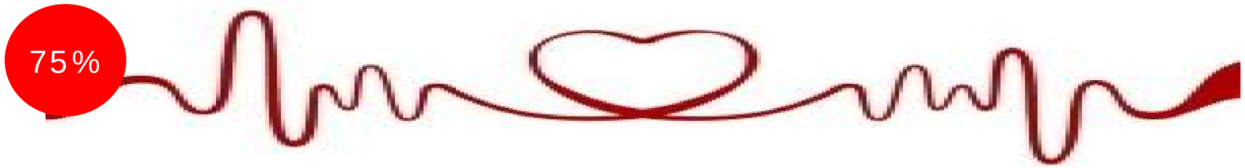




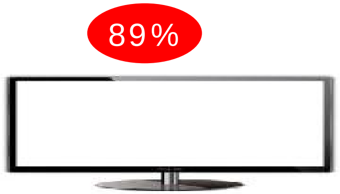
Television meets key needs very well

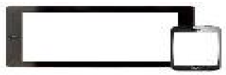
Sociability

Synchrony



Sensory Stimulus





Size matters even for those without a TV set

Amongst non-TV owners....

57% Laptop — +8% vs. total non-TV occasions

35% PC — +17% vs. total non-TV occasions

6% Tablet — -18% vs. total non-TV occasions

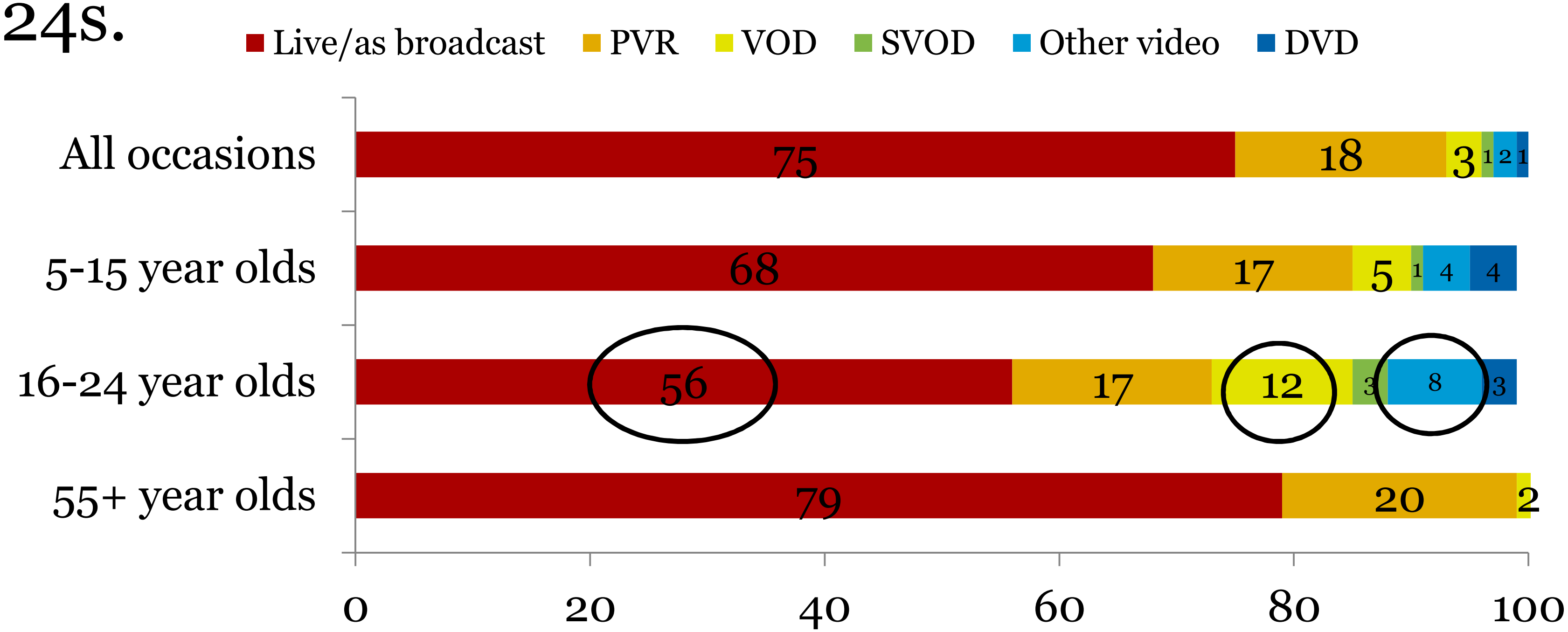
2% Mobile — -6% vs. total non-TV occasions

0% Games console — -1% vs. total non-TV occasions

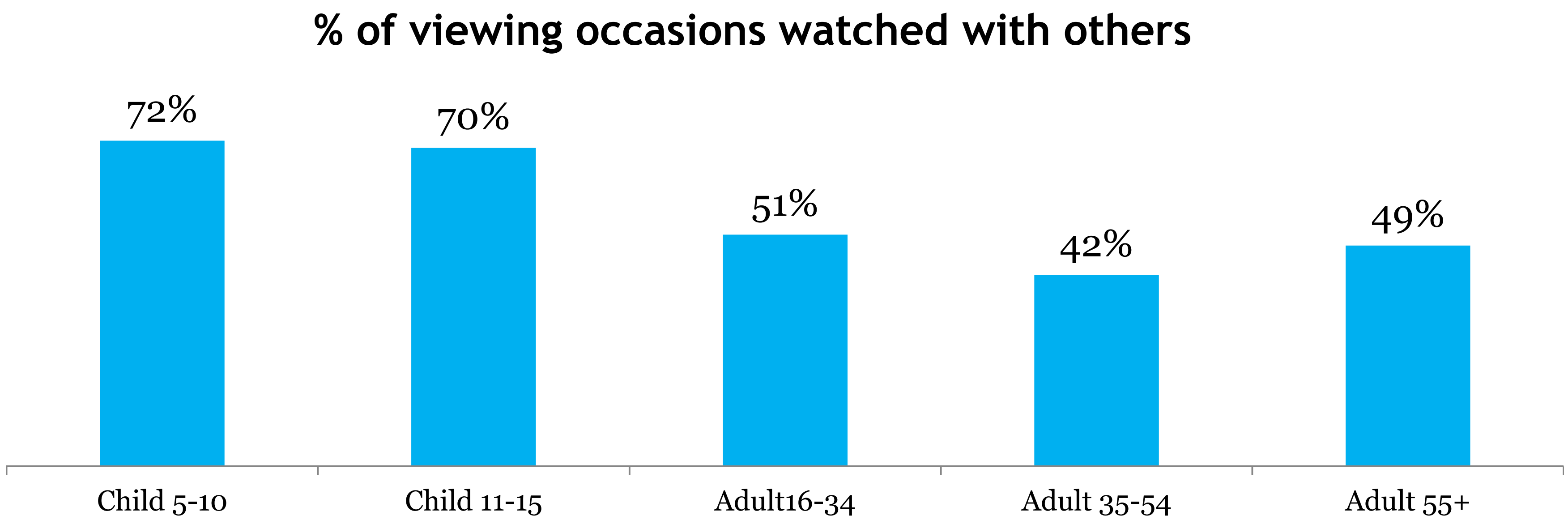
Not forgetting the need to relax….


But there are some divergent behaviours….
Slide 22

VOD and other video (e.g. YouTube) are much more common, and live much less common amongst 16-24s.



Children are even more likely to watch with others



There are some occasions where audiences go straight to PVR or VOD

Do I know what I want to watch?

YES
82%

WATCH

NO
18%

1st Search

What they watched:

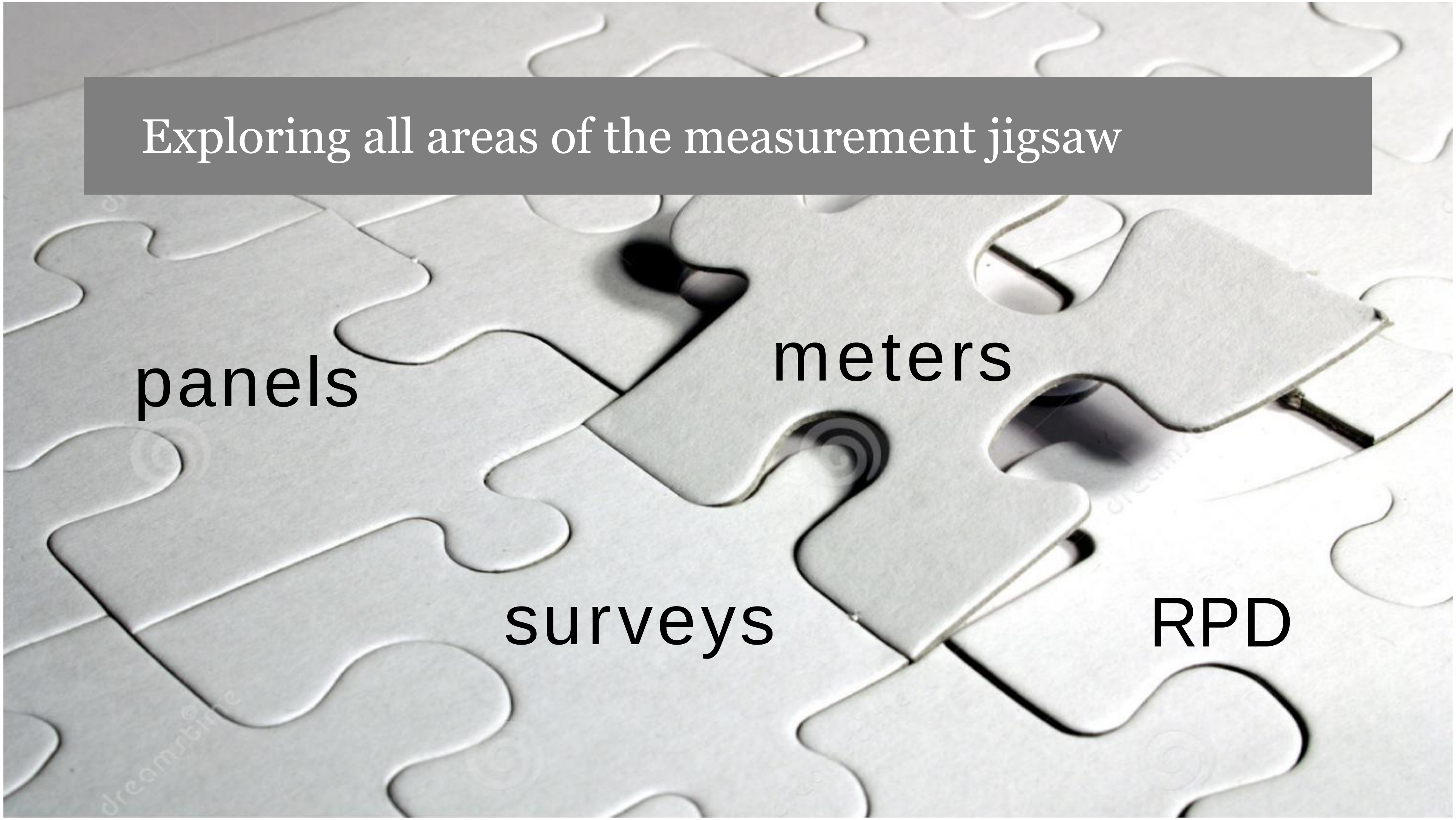
76%
Live

18%
Recorded

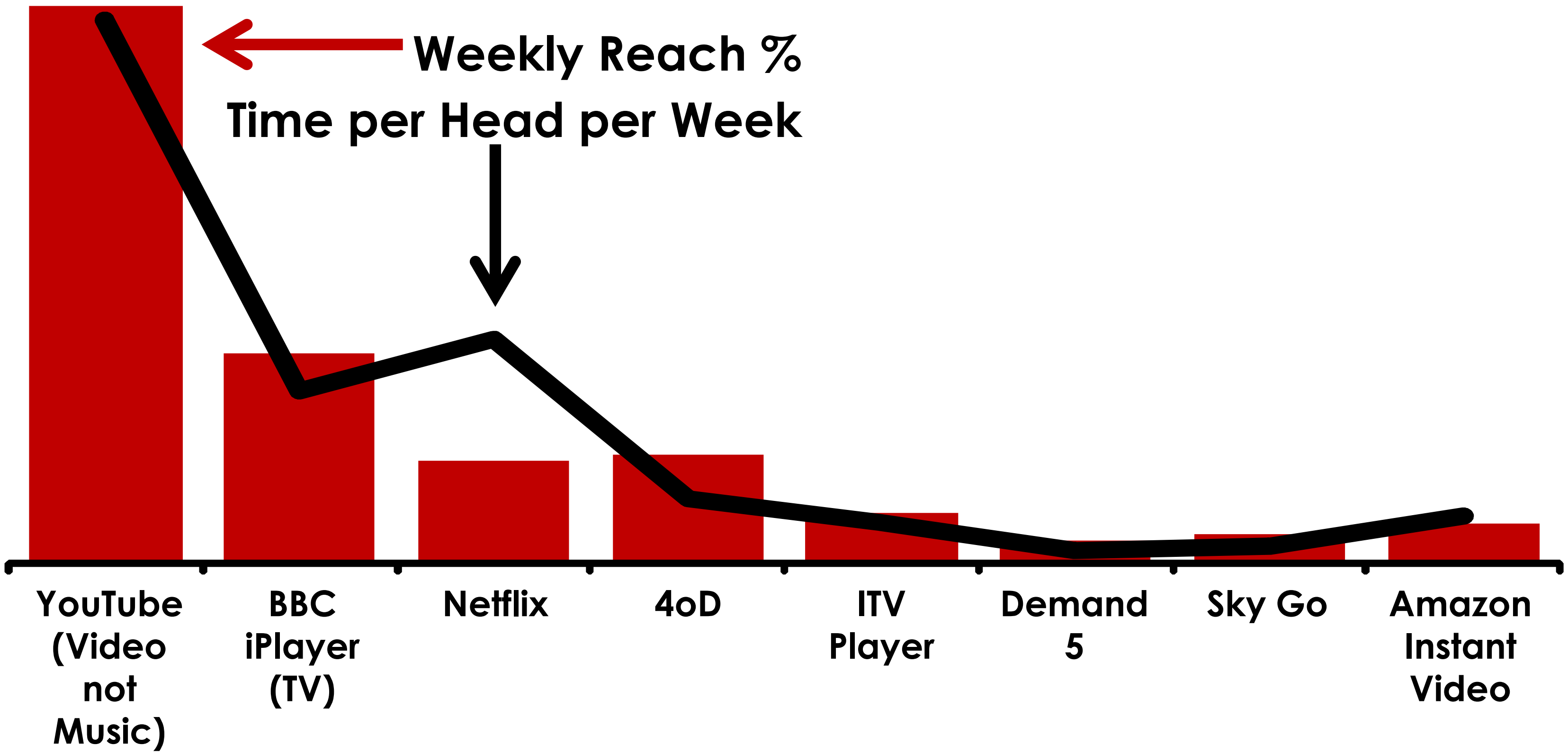
4%
Free VOD

1%
Sub VOD

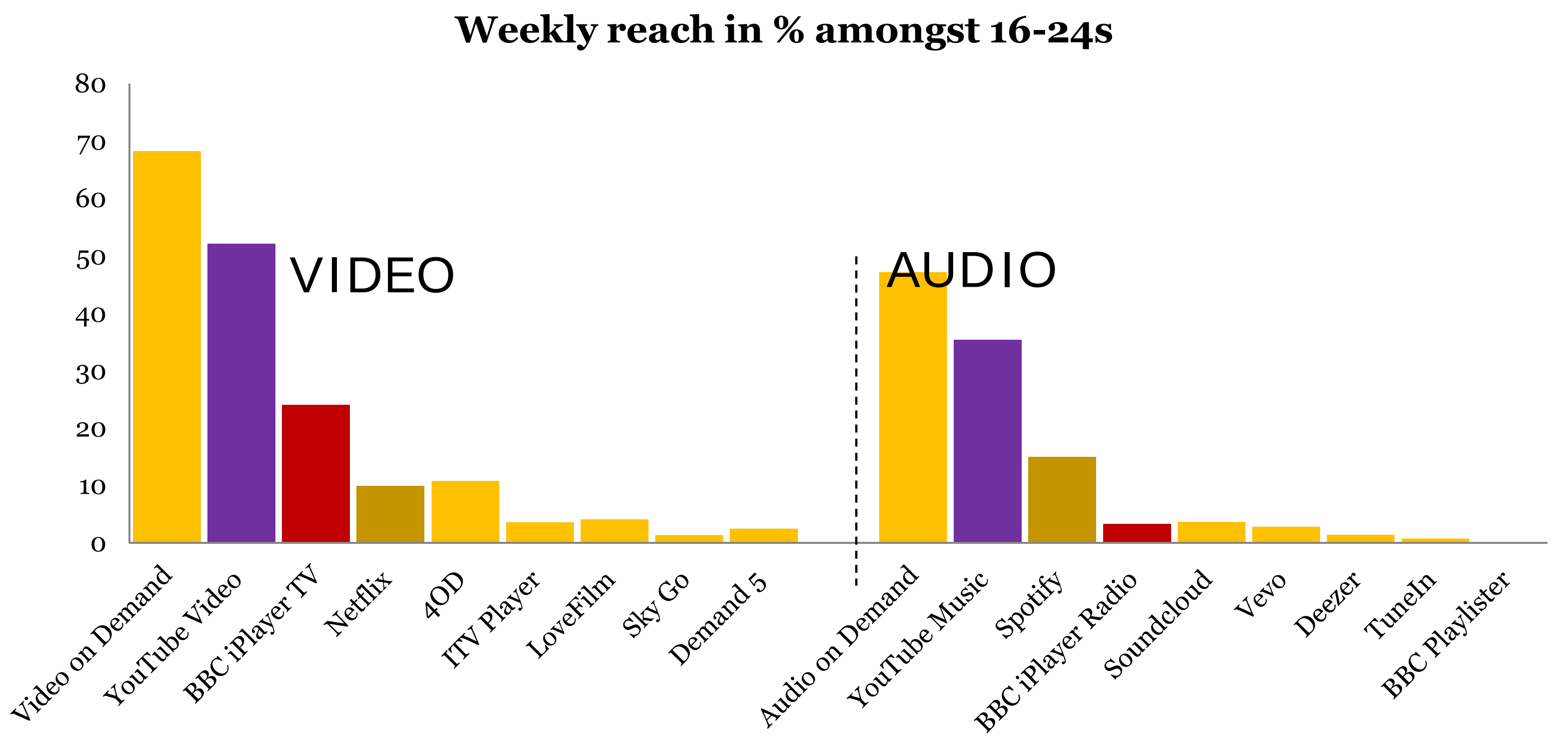
2%
Other online


Exploring all areas of the measurement jigsaw
panels
meters
surveys
RPD

Improving measurement of 'other video' on our cross media panel



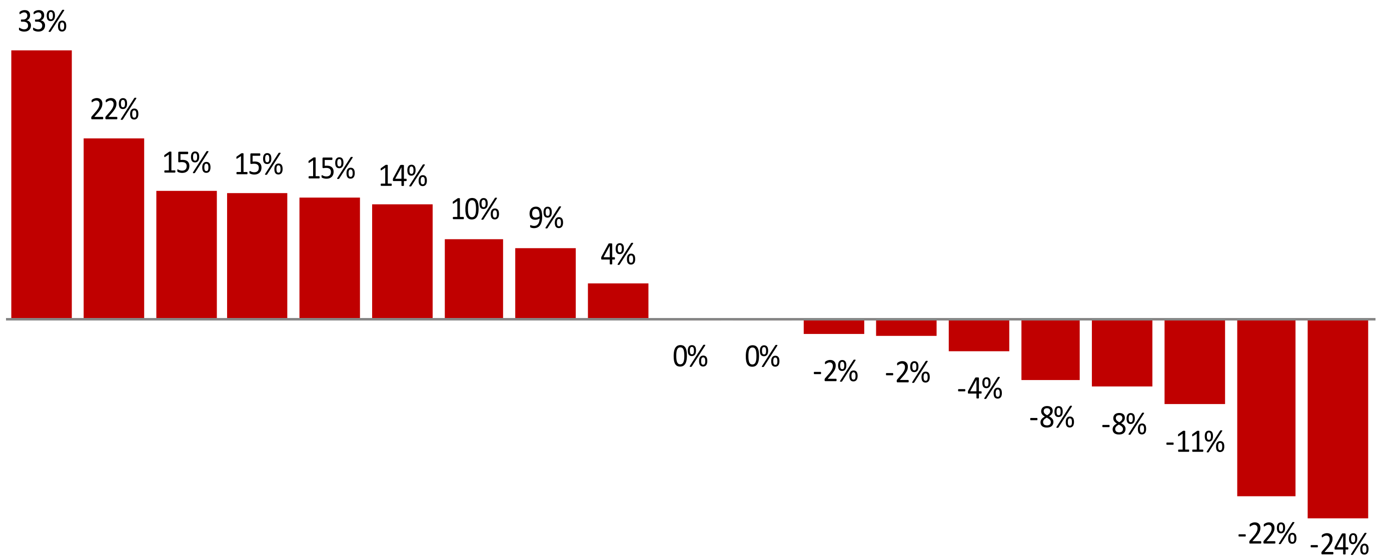
Separating out video vs audio on YouTube



Measuring momentum and checking on new entrants

Used more, less or the same in last 6 months – Net More

Base: users



Exploring passive measurement on the panel

1. Audio matching / fingerprinting of radio - panellists download ‘listening app’ on smart phones

2. Capture online behaviour via software meters downloaded by the panel members to PC, laptop, mobile and tablet

Integrating surveys with analytics

This is GfK's survey web page

GfK

This is ComScore's tag

comScore

This is Comscore's server

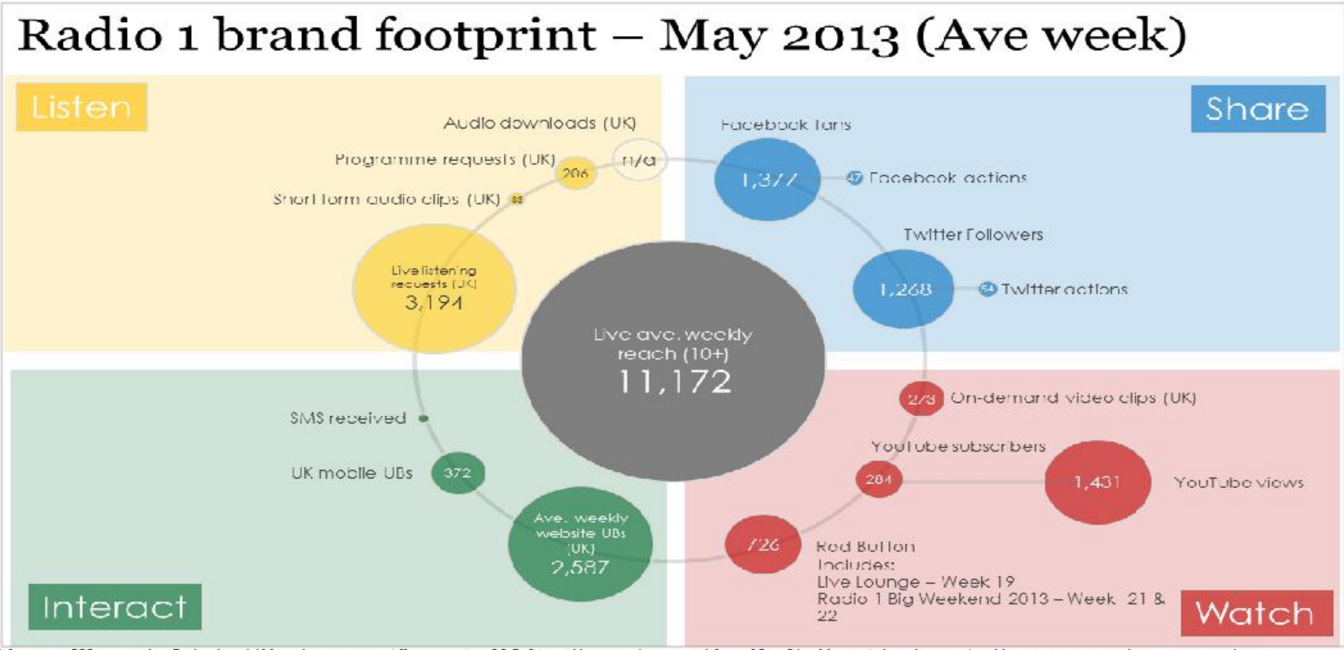
comScore

Generic Competitor News Site

Generic Search Engine

This is Comscore's

Modelling brand footprint



All figures in 000s; note that Radio 1 and 1Xtra charts are on different scales. BBC iStats AV was undercounted from 20th - 21st May and therefore is advisable to use caution when comparing data.

BBC | Marketing & Audiences


Thank you!