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
In fact...
2 > -3

\[ 0.999... = 1 \]

\[ \pi \approx 3.14 \]

\[ \frac{\sqrt{2}}{1 + 2 \cdot 3} \]

\[ \frac{5^2}{(1 - 2) + 3} \]

\[ 101_2 = 5_{10} \]
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

<table>
<thead>
<tr>
<th>Rationalistic view</th>
<th>Behavioural Economic view</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstract reasoning</td>
<td>Embodied, interactive reasoning</td>
</tr>
<tr>
<td>Focused, sustained, high-involvement processing</td>
<td>Partial, shifting, low-involvement processing</td>
</tr>
<tr>
<td>Conscious information processing is the norm</td>
<td>Unconscious processing is the norm</td>
</tr>
<tr>
<td>Seek best solution however long it takes</td>
<td>Settle for 'good enough’ to save time/ effort</td>
</tr>
<tr>
<td>Recall of information</td>
<td>Recognition of presented cues</td>
</tr>
<tr>
<td>Individual in isolation</td>
<td>Individual subject to social urges and influences</td>
</tr>
<tr>
<td>Choice tasks addressed and solved directly</td>
<td>Choice tasks broken down into simpler proxy tasks</td>
</tr>
</tbody>
</table>
There was a very dominant behaviour pattern observed...
Do I know what I want to watch?

- **YES**
  - Find through EPG
  - Watch

- **NO**
  - Start from top of EPG, look for programmes
  - Do I find a programme I want to watch?
    - **YES**
      - Watch
    - **NO**
      - Start again from top of EPG, look for interesting-sounding programmes on channels I like
      - Do I find a programme I want to watch?
        - **YES**
          - Watch
        - **NO**
          - Wallpaper channel

**OTHER: RESIDUAL**
- Use paper guide or go up/down through channels

**OTHER: NEW NICHE**
- A few search by genre not channel
Check PVR

Do I find a programme I want to watch?

YES

WATCH

Go to catch-up/ on demand, search for programmes I missed

Do I find a programme I want to watch?

YES

WATCH

NO

Look at most popular choices

NO

Go to Netflix or on-demand before/instead of PVR

OTHER: NEW NICHE

A few (busy people, parents with small children) start from PVR

OTHER: NEW NICHE
On the vast majority of occasions people know what they want to watch

Do I know what I want to watch?

YES
82%

NO
18%

WATCH

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.

Do I know what I want to watch?

- **YES** 82%
- **NO** 18%

1st Search: 78% Live

Do I find something I want to watch?

- **YES** 84%
- **NO** 16%

2nd Search: 49% PVR

Do I find something I want to watch?

- **YES** 88%
- **NO** 12%

3rd Search: 45% VoD

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

**What looking for**

<table>
<thead>
<tr>
<th>Content to fill time</th>
<th>For something familiar</th>
<th>for something new</th>
</tr>
</thead>
<tbody>
<tr>
<td>49</td>
<td>41</td>
<td>13</td>
</tr>
</tbody>
</table>

**What watched**

<table>
<thead>
<tr>
<th>Something familiar</th>
<th>Time filler</th>
<th>Wallpaper channel</th>
<th>Something new</th>
</tr>
</thead>
<tbody>
<tr>
<td>46</td>
<td>28</td>
<td>11</td>
<td>10</td>
</tr>
</tbody>
</table>
It was very similar for young audiences...

Do I know what I want to watch?
- YES 75%
- NO 25%

1st Search: 73% Live

Do I find something I want to watch?
- YES 78%
- NO 22%

2nd Search: 32% PVR 22% VOD

Do I find something I want to watch?
- YES 93%
- 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

VOD but would have preferred live

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>5-15s</th>
<th>Innovators</th>
</tr>
</thead>
<tbody>
<tr>
<td>40</td>
<td>45</td>
<td>61</td>
<td></td>
</tr>
</tbody>
</table>

PVR but would have preferred live

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Television meets key needs very well

Sociability
- 52%
- 50%

Synchrony
- 75%

Sensory Stimulus
- 89%
Size matters even for those without a TV set

Amongst non-TV owners....

- Laptop: 57% (up +8% vs. total non-TV occasions)
- PC: 35% (up +17% vs. total non-TV occasions)
- Tablet: 6% (down -18% vs. total non-TV occasions)
- Mobile: 2% (down -6% vs. total non-TV occasions)
- Games console: 0% (down -1% vs. total non-TV occasions)
Not forgetting the need to relax....
But there are some divergent behaviours....
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

% of viewing occasions watched with others

- Child 5-10: 72%
- Child 11-15: 70%
- Adult 16-34: 51%
- Adult 35-54: 42%
- Adult 55+: 49%
There are some occasions where audiences go straight to PVR or VOD.

**Do I know what I want to watch?**

- **YES** 82%
- **NO** 18%

What they watched:

- 76% Live
- 18% Recorded
- 4% Free VOD
- 1% Sub VOD
- 2% Other online
Exploring all areas of the measurement jigsaw
Improving measurement of ‘other video’ on our cross media panel

Weekly Reach %

Time per Head per Week

YouTube (Video not Music)
BBC iPlayer (TV)
Netflix
4oD
ITV Player
Demand 5
Sky Go
Amazon Instant Video
Separating out video vs audio on YouTube

Weekly reach in % amongst 16-24s
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

This is ComScore’s tag

This is ComScore’s server
This is Comscore’s

Generic Competitor News Site
Generic Search Engine
Modelling brand footprint

Radio 1 brand footprint – May 2013 (Ave week)

Listen
- Audio downloads (UK)
- Programme requests (UK)
- Short-form audio clips (UK)

Share
- Facebook fans
- Twitter followers
- Youtube subscribers
- Youtube views

Interact
- SMS received
- UK mobile USSD
- Website visits

Watch
- On-demand video clips (UK)

Live ave. weekly reach (104) 11,172

All figures in 2013. Note that Radio 1 and iPlayer charts are on different scales. BBC Radio AV was under-reported from 20th – 21st May and therefore should be ignored when comparing data.

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Thank you!