THE VIEWING REPORT

Our annual exploration of the UK's viewing habits

APRIL 2017

BARB
BROADCASTERS' AUDIENCE RESEARCH BOARD

Objective information is critical for the UK's television and advertising industry. Each year, £7.5 billion is spent by broadcasters and advertisers 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 UK television and advertising industry. 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 continue 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.

CONTENTS

MEET OUR CONTRIBUTORS

Dino Myers-Lamptey
Dino was appointed Head of Strategy at the7stars, the UK's largest independent media agency, in 2012 having previously spent 10 years in the media agency business. He tackles the need for transparency in the provision of metrics and asks, are we counting what actually counts?

Sarah Rose
Sarah is Channel 4's Director of Consumer Insight, with a brief to use viewer data in a way that inspires new ideas. In 2006 she launched the ground-breaking 4OD, now All 4, and brings her experience to bear on the question of how to survive the evolution of television distribution platforms.

Rory Sutherland
Rory is Vice Chairman of Ogilvy UK. He argues that from politics to marketing communications to television, false narratives need to be countered by reliable signals that are placed in front of large audiences.

GUEST ESSAYS

6 Reliable signals in a post-truth world
Rory Sutherland

8 Are we counting what matters?
Dino Myers-Lamptey

10 A broadcaster's survival guide
Sarah Rose

BARB DEVELOPMENT ROADMAP

12 Frequently asked questions

NEW INSIGHT

14 Online TV: What we know

16 Top on-demand programmes
Online TV viewing

CENTREFOLD - THE TOP TENS OF 2016*

17 Top live programmes
Online TV viewing

18 The swinging sixties
Channel repertoire

20 Glued to the goggle box
TV screen time

UPDATED INSIGHT

22 British summer timeshift

24 Make cake not war
Share by genre

26 Portfolio planning
Share by broadcaster

27 Closing thoughts

28 Reboot

29 Find out more

* Please let us know if the centrefold has already been removed and you would like another.

HELLO,

Welcome to the 2017 edition of The Viewing Report.

2016's word of the year, for good reason, was post-truth. Political events might have been the primary stimulus, yet the steady stream of stories about online measurement mishaps provided a resonant echo in our industry. Advertisers' voices, in response, are louder than ever as they ask for clearer standards of audience measurement and more independent validation.

The thread of steel in this conversation is the need for transparency. Without transparency there is diminished accountability, and without accountability there is diminished trust and confidence. Audience measurement data are a critical input to understanding the effectiveness of the investment that's made in media campaigns, and with understanding comes confidence.

We feature two guest essays in The Viewing Report that consider the question of how to build trust in a post-truth world.

Our thanks to Rory Sutherland of Ogilvy UK, who highlights how advertisers can build confidence by choosing reliable signals and placing these in front of large audiences. We also welcome Dino Myers-Lamptey of the7stars, who focuses on the data used by advertisers and their agencies for buying and evaluating advertising campaigns. He asks, are we counting what actually counts?

BARB has been counting and reporting television audiences since 1981 and our viewing figures are accepted across the industry as an objective and independent currency. Like any currency, stability is important, yet this doesn't mean that we're not changing. Indeed, we've adapted continuously to meet the needs of a fragmenting marketplace.

We're pleased to publish a guest essay from Sarah Rose of Channel 4, who takes a long view on how broadcasters have evolved in the face of fragmentation. She offers a guide to surviving a future in which the internet becomes an increasingly important distribution platform for television.

BARB's own survival guide relies on harnessing new data sources that complement the strengths of our representative panel of UK homes. We now collect census data from TV player apps, which form the basis for the first joint-industry, audited measure on online TV viewing in the UK. We've been publishing these data since September 2015 and dig further into the viewing figures on page 14.

Next on our to-do list is the task of turning this census-level data set into robust information about who is watching what through online TV platforms. To this end, we've recently announced the appointment of Kantar Media to deliver Dovetail Fusion. You can read more about this on page 12, alongside other questions we're often asked about our development roadmap.

As in previous years, The Viewing Report delivers a state-of-the-nation review of the changing ways in which people are watching television. We've updated regular favourites while unearthing new insights into trends in total screen time, device in use and channel promiscuity.

And you'll find a centrefold pull-out this year. We've put together a collection of top tens to satisfy those of you who want to know the most watched programmes in 2016.

Happy reading.

Justin Sampson
Chief Executive
BARB

WITHOUT TRANSPARENCY THERE IS DIMINISHED ACCOUNTABILTY, AND WITHOUT ACCOUNTABILITY THERE IS DIMINISHED CONFIDENCE

RELIABLE SIGNALS IN A POST-TRUTH

The humorist HL Mencken once proposed that there should be a special type-style called "ironics" (like italics, but sloping in the opposite direction) to prevent people misunderstanding irony in print. In text, shorn of the pace, tone and timbre of spoken communication, there can be a yawning gap between what you intend to say and the emotional reaction it creates. We all know this.

Or do we? I sometimes wonder.

In the course of the US election, I was astounded to see media and communications professionals using social media to spread the kind of abuse of Trump's supporters which was, to my mind, very likely to get him elected. As one despairing liberal blogger wrote, "If you want Trump to win, carry on calling his supporters racist."

I am sure heaping abuse on middle-America made metropolitan, liberal media-types feel good about themselves, just as shouting abuse at an opposing team's supporters during a football match feels good. But it's worth remembering that a football match is rather different from an election. For one thing, you are not really attempting to change your rivals' allegiance; moreover the result of the match is not decided by the fans.

If even advertising experts failed to spot this, what hope is there?

This tone-deaf approach to persuasion even by supposed experts matters rather a lot. Because it suggests that something about our model of communication is wrong. Once we depart from face-to-face communication, even experts can lose the plot. We fall back on a communication schema which is primarily about transmitting information, rather than as a means of generating and arousing emotions: trust, confidence, affection. "This latest statement from Trump is clearly an outrage, therefore the more people who know of it the better. I must press Share & Retweet".

It doesn't work like that. This is not to say that factual information plays no part in advertising. But it takes a back seat to emotional responses almost every time.

At some level, metacommunication usually matters more than the message. "What does it mean that this person is saying this?" outweighs "What is he saying?"

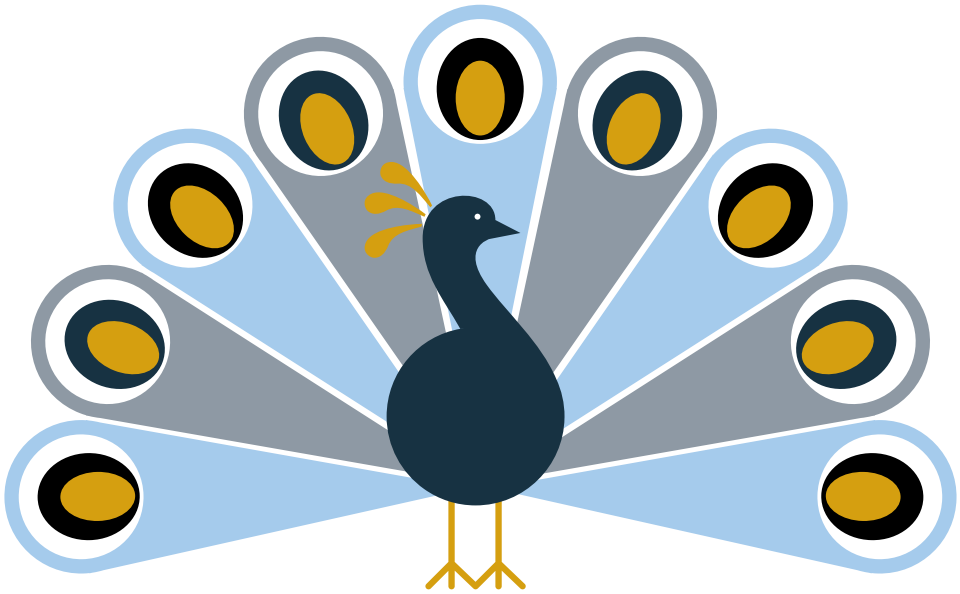
As proof of this, it is interesting to note that in Eastern Europe under communism, advertising often depressed demand for a product. The inference was that, in an environment where almost everything worth owning was in short supply, the only reason for the government to advertise anything was in those occasions where it had managed to produce goods of such irredeemable crappiness they weren't worth queuing for.

If you have time this month, spare a quarter of an hour to read Robert Heath and Paul Feldwick's paper "Fifty Years Using the Wrong Model of Advertising." Or spend a little time investigating the evolutionary psychologist Dan Sperber's ideas on communication and relevance theory. What all three point out is that our ideas on what communication is have been distorted by models of communication which are really about data transmission in telephony, rather than the kind of high-context communication skills which would have proved valuable to humans in the evolutionary environment, where they are used primarily to decide what to believe and whom to trust.

Yet the low-context "conduit model" of communication seems to dominate our thinking, even though it is better suited to a fax machine rather than a highly evolved social species.

"AS SEEN ON TV" CONVEYS SOMETHING WHICH "AS SEEN ON FACEBOOK" DOES NOT

WORLD



What makes this so important is that this "wrong model" now infects almost everything about decision making in marketing communications. How creative work is briefed, researched and evaluated; and how media is bought. It reduces every communications challenge to delivering the necessary bits of information to the required eyeballs at the lowest possible cost.

What if this is diametrically wrong? In the world of nature, what matters most is not the content of a message but the extent of its trustworthiness. Many flowers produce a smell, but bumblebees have learned to prefer those particular smells which can only be produced by plants which are capable of producing nectar (because the chemicals necessary for the smell are also necessary for the production of nectar).

Peahens (according to costly signalling theory of Amot Zahavi) admire peacocks for their large tails because to produce a large tail and to survive while keeping it in first rate condition requires a remarkable genetic feat: it proves the worth of the signaller precisely because it is difficult to do. We send wedding invitations on gilt-edged cards, and not by email, precisely because the expense of doing so signals our commitment to the union.

Television advertising, it seems to me, is a trustworthy signal in a way that most online communication is not. It requires a considerable investment in scarce resources - talent, money, craft - to do it well. It is therefore a reliable signal of an advertiser's faith in the futurity of their own product. "As seen on TV" therefore conveys something which "As seen on Facebook" does not.

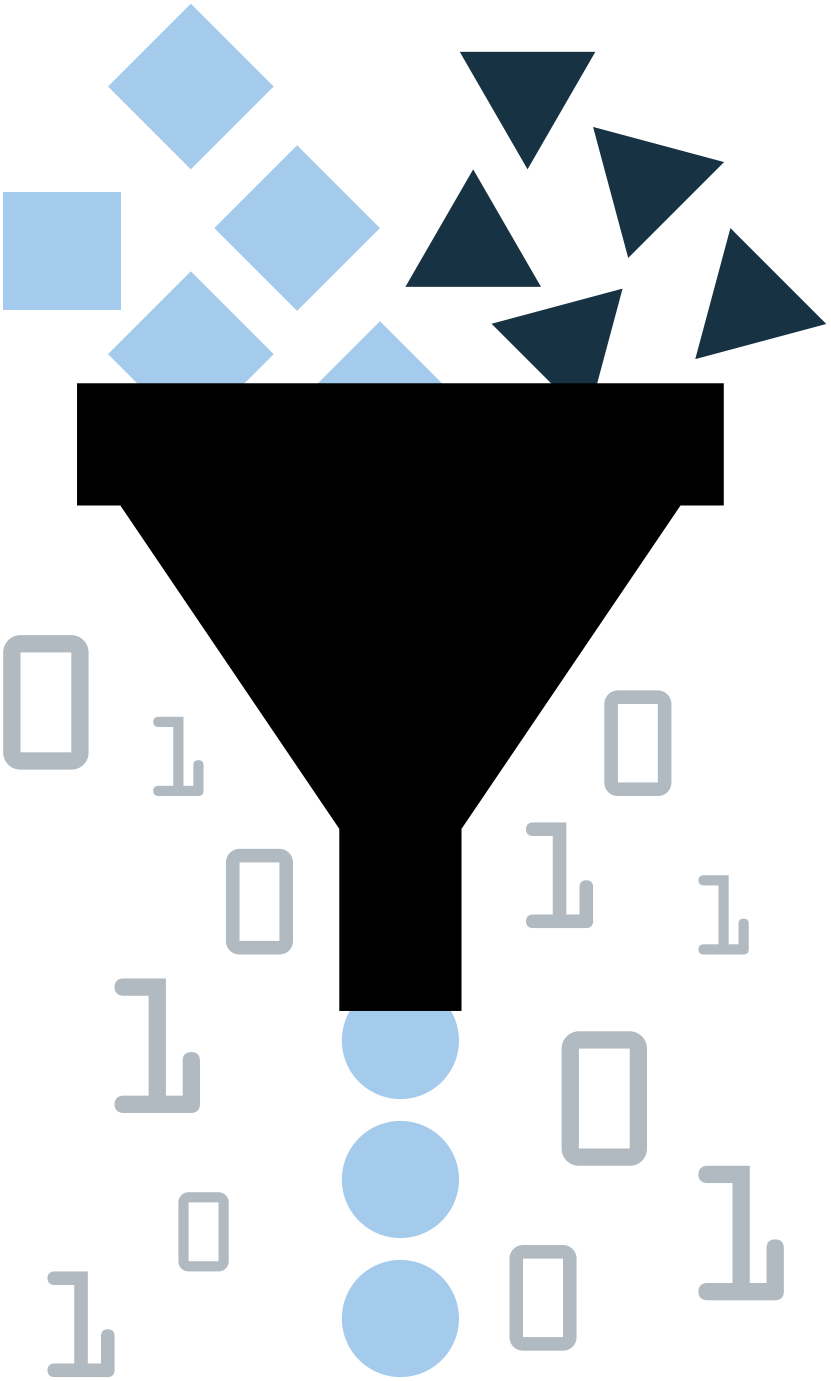
But there is another feature of mass television which is often overlooked. When we get married, not only do we send expensive invitations as a signal of our confidence in our future. We do something else: we make our vows in front of a large number of people simultaneously. We do not go door to door to each of our friends in turn, telling each of them how we plan to stick together in sickness and in health. We do it in front of a crowd.

At a time when many online media are being berated for fake news, this is a distinction worth remembering. It takes a great deal more confidence to make a claim in front of a large audience. You can't fool all of the people all of the time.

Rory Sutherland
Vice Chairman of Ogilvy Group UK

ARE WE COUNTING WHAT

22% of you will love what I'm about to write, 43% of you will support it, 38% will passionately disagree (7% violently), and more of you will believe in those stats than will have cared to calculate that the numbers don't add up to 100%.



This is inattentional blindness, the plague of our day, and an issue the media industry is partly to blame for.

Marketing pioneer John Wanamaker's infamous claim that 50% of his advertising spend was wasted has since rallied our industry to find out what half was actually working. Buoyed by endless data, we've rightfully attempted to become the masters of attribution, aiming to understand the algorithms of influence that lead to the all-important consumer acquisition.

When it comes to understanding the unknown, we aim for rational nirvana, yet underestimate the power of our emotional bias that almost entirely dictates our decisions. As a result, we believe "facts" that are presented to us and trust that a mere mention of them is proof of research and, more importantly, proof that it matters.

This is an industry that for too long considered a 0.01% click-through rate on an MPU, the mysteriously-named square ad units, as an acceptable benchmark. Not because it was effective, but because it could be counted and compared to all the other "clicking accidents" that were registered for other brands.

The industry has rightfully championed new channels, but has wrongly accepted whatever measurements they spit out as being proof of effect. In fairness to many, measures have only been used as temporary guides while the pursuit of something more robust has continued. But the stats and data can mesmerise, and when there's so much to

MATTERS?

THE INDUSTRY HAS RIGHTFULLY CHAMPIONED NEW CHANNELS, BUT HAS WRONGLY ACCEPTED WHATEVER MEASUREMENTS THEY SPIT OUT AS BEING PROOF OF EFFECT

understand we forget to ask the all-important question: are we counting what actually counts?

What we have right now is only good in parts, and that's not sufficient for the promises we make. We need to take the red pen out and not hold back on the editing of our metrics.

Digital data are providing all kinds of targeting and personalisation opportunities that are intuitively beneficial but, rather than swimming in it, we're treading water. Every new piece of data tends to bring a new metric for measurement. Centimetres or inches, kilos or pounds, maybe it's our history? These errors in measurement and data are not cultural quirks. At best, they are mistakes, and at worst, plain fraud. Humans rather than algorithms should be accountable.

To get a grip of it all, we desperately need to slow down, simplify and agree some consistency; even if it comes at the temporal rejection of some shiny new metrics. The industry needs to get a grip on understanding effectiveness and that must be done with industry standard agreements.

If we don't, the inevitable awaits and consumers will further avoid ads using ad-blockers or paying for/using ad-free subscription services like Netflix or Kodi. This path will only lead to more media providers struggling to survive, and will undoubtedly reduce the quality of content we have available today.

To save ourselves from drowning we have to be clear on what we need and value in data and measurement. This requires each of us to accept that there'll be little differentiation or competitive advantage when it comes to these metrics. The more simplicity and consistency, the better.

The answers must start with the single clear objective in mind: creativity. It's what our industry is built for. It's what wins and it's what counts.

For me, this is about simplifying and focusing on measuring the "inputs" ("real" reach, frequency and intensity) and "outputs" (impact, engagement and outcome), with universal currencies we all agree on, and across shared and open platforms we can all trust.

Learning to swim rather than drown in the data requires us to come together and learn in a clear and transparent pool rather than a deep and murky sea. So grab your armbands, put your reality goggles on and jump in!

Dino Myers-Lamptey
Head of Strategy,
the7stars

A BROADCASTER'S SURVIVAL GUIDE

I have been watching a lot of Walking with Dinosaurs with my six-year-old son recently. On a well-known SVOD service, on a variety of screens and always at a time of our choosing. He calls it television.

And of course it is television; amongst the best examples of the medium in recent times. Telling the tale of great species emerging, evolving, and dominating over three key eras, before ultimately expiring, and now residing in history and legend. A fate, it would seem, some media commentators have long since been foretelling for linear broadcasters themselves. Once dominant, they would allegedly struggle to compete on the global stage in face of A Time of Titans (episode 2, seeing as you ask). No longer the Giants of the Skies (episode 4...) themselves, their competitor landscape has fundamentally changed, and all because of the advent of that vast land of the internet.

I find myself wondering how far this metaphor really stretches. Spoiler alert: my version does not end in extinction. Television's Triassic period is long behind us. Those care-free days of five linear channels were supplanted when digital technology came along. Hundreds of channels exploded onto the scene in what had been heralded as our very own Jurassic bloodbath. But the incumbents adapted and evolved their own models to survive in the face of this new threat. Rather successfully, as it turns out. PSB portfolios still account for 70% of linear TV viewing two decades on.

Our Cretaceous period began when the rise of the internet first loomed large for audio-visual content. Rather than be swallowed up by it, the linear broadcasters played it at its own game. Streamed video to your mobile? Let's launch a broadcaster app! Smart TVs? No problem, we'll see you there. So you like watching TV content on your games console (and wow, you really do, don't you?), Ok, we'll make it work for you there too.

And so the BBC iPlayer, ITV Hub, All 4 and My5 are found on multiple platforms, extending their audience reach, building their brands and gathering the tools to explore new monetisation models. And in the process some are reaching corners of the land that even the mighty BARB cannot yet measure, giving access to a richer, deeper understanding of audience habits and preferences.

So far so resilient. But now a new era dawns; the digital giants are sharpening their claws and eying up our terrain, licking their globally dominant lips. Apple's new aggregation app doesn't hide its ambition: it's called TV. Facebook has just launched a dedicated video app, and Google is constantly developing its YouTube ambitions. Amazon's quieter entry onto the scene is now building to a roar with Alexa connecting our whole homes, including the entertainment consumed within them.

In the process they are not just feeding their own corporate ambitions but also enabling a raft of fleet-footed content creators and IP owners to reach consumers directly. So how will the great broadcaster survivors respond to this latest threat?

The answer, I believe, lies in a combination of maximising their natural attributes, while being willing to evolve and adapt yet again to the changing landscape around them. A few guidelines for survival, if I may:

1 Play to your strengths. In an ever more confusing world, familiar signposts matter: well-defined brands, a respected editorial tone, an understanding of your audience, and of course content, content, content. Despite all the noise about global budgets, the domestic broadcasters still spend around £2.5 billion per annum on UK

BROADCASTERS HAVE ADAPTED TO SURVIVE WHAT COULD HAVE BEEN A JURASSIC BLOODBATH

commissions which consistently dominate the viewing charts.

2 Know your terrain. Broadcasters have always had a good understanding of their audience, but their on-demand variants have opened up an altogether deeper knowledge of who they are catering for. Now well-established registration practices mean that they can target recommendations, personalise user interfaces and serve more relevant advertising.

3 Learn new tricks. Part of evolution is driven by changing behaviour. Organisational structures, investment profiles, skillsets being recruited and strategic focus all need to adapt to ensure survival: ad tech alongside ad sales, machine learning alongside scheduling, data science alongside marketing strategy, an adaptable business model. The need to keep moving and respond quickly is paramount.

4 Lay your tracks. If you want to be found, be sure that consumers come across you easily. Discoverability will become a key battleground for content owners, prominence must be protected and sophisticated metadata will be essential ammunition for both creative and commercial success.

5 Follow your tracks. Equally, measurement has never been more important. This is an age where transparency and accountability is ever more valued and the survivors will be those who can prove the value of their inventory with integrity, while enabling it to be tracked and monetised wherever viewing takes place.

6 Accept you may be stronger together. Not all species will survive. Identifying potential partners and working with them to defeat or elude your common foe may well be the trick to ensuring your own longevity. Co-productions, distribution deals, joint selling, deep linking or true aggregation to name but a few; forming natural - or unexpected - alliances could shore up your defences and put you strategically ahead.

7 Remember what you stand for. While broadcasters may no longer be the biggest beasts in town, they are still uniquely capable of delivering the biggest communal entertainment experience, and the cultural importance this holds for our nation as a whole shows no signs of abating. In addition, the public service broadcasters - and Channel 4 in particular - need to combine their natural strengths with their new technological tricks to ensure they continue providing diverse and surprising content while offering an ever more personalised service. A challenge, certainly, but one made thrillingly possible by television fully embracing the power of the internet.

There is only one series of Walking with Dinosaurs - for rather obvious reasons. But we all know how broadcasters love a returning format. I have a feeling their own survival guide will ensure they thrive for many eras to come.

BROADCASTERS DELIVER THE COMMUNAL ENTERTAINMENT EXPERIENCE THAT IS SO IMPORTANT TO THE CULTURE OF OUR NATION

Sarah Rose, Director of Consumer Insight, Channel 4

FREQUENTLY ASKED

WHAT IS BARB'S SCOPE FOR AUDIENCE MEASUREMENT?

BARB's first priority is to measure viewing to all programme and commercial content that is distributed by our established base of broadcast customers.

We need to do this across all platforms and all devices as this represents the vast majority of current monies at risk. We measure viewing live at the point of broadcast and timeshift viewing up to four weeks after broadcast. We can also measure viewing to non-linear content that hasn't been broadcast in the previous four weeks.

HOW CAN BARB DELIVER TOTAL REACH ACROSS ALL DEVICES?

Calculating total reach needs to recognise the challenges posed by a fragmenting market. This naturally demands larger samples to deliver robust results across the whole market.

Our solution for robust measurement of total reach relies on combining two data sources: people data from our established panel and data sourced directly from the devices that are used to watch online TV.

Our representative panel of homes is critical. Without this, it's not possible to understand the reach of a programme/campaign, demographic viewing profiles and the number of viewers per screen.

BARB also collects census data for online TV viewing. We've been publishing the UK's only fully-audited, joint industry measure of online viewing since September 2015. The viewing figures are generated from software code that's been added to TV player apps such as All 4, BBC iPlayer, ITV Hub, My5, SkyGo and UKTV Play.

Fusing these data sources will deliver robust cross-device reach for the television and advertising industry. We call this Project Dovetail. The first steps towards this have already been implemented.

WILL CROSS-PLATFORM REACH BE AVAILABLE FOR COMMERCIALS AS WELL AS PROGRAMMES?

Yes, BARB will publish data so that advertisers know how online VOD campaigns increase the reach and frequency of linear advertising campaigns. By way of an example, Advertiser A could see that its campaign for Brand B achieved the following.

- Linear campaign: 66% reach at an average frequency of 3.4 on TV sets.
- On-demand campaign: 12% reach at an average frequency of 1.6 on TV sets and computer devices.
- Linear + on-demand campaign: 68% reach at a frequency of 3.6 all devices.

WHAT ARE BARB'S METRICS FOR ONLINE TV VIEWING?

Our metrics for online TV viewing are comparable with established currency units such as average audience and TVRs. These are based on the principle of an average duration audience.

There are two metrics at the heart of our plans for reporting online TV viewing: average programme streams and average ad streams. The calculation for each metric divides the total amount of time spent viewing by the duration of the programme/ad.

These new currency units have been ratified by JICWEBS, the industry-owned body responsible for the independent development of standards for online measurement.

D QUESTIONS

WHEN WILL PROJECT DOVETAIL BE DELIVERED?

Project Dovetail delivers our strategy of dealing with fragmentation by combining the strengths of the data that we collect from our representative panel of people with data collected from the devices that are used to watch this content.

There are four deliverables.

- Generate census data for online TV viewing: BARB achieves this through software code that's embedded in TV player apps used by viewers. Over 30 different platforms have implemented this software and been audited by ABC to ensure the data meet BARB's standards. The results are reported each week in The TV Player Report, the first joint-industry, audited measure of online TV viewing in the UK. It's the first deliverable of Project Dovetail. It reports on the consumption of online TV content in TV player apps. The TV Player Report relies on census-level information that's generated whenever anybody, not just a BARB panel member, watches programmes on a TV player app.

CENSUS DATA DETERMINE ONLINE TV AUDIENCE LEVELS, WHILE THE DEMOGRAPHIC PROFILE COMES FROM OUR PANEL DATA

- Determine how people watch on personal computers, tablets and smartphones: Software meters are installed on the personal computers and tablets of our panel members. These software meters deliver information about what has been watched on these devices and who was watching. Currently, over half of eligible homes on the panel have these software meters installed; we are exploring how this might also be installed on our panel members' smartphones.

- Establish a fusion methodology: Dovetail Fusion will blend the data generated in the previous two steps. Kantar Media was appointed in February 2017 to deliver Dovetail Fusion. It's scheduled to launch in March 2018.

- Work with return path data: Set-top box data offer similar benefits to the online TV viewing census data that BARB is collecting. BARB has conducted successful pilot projects with data from Sky homes and hopes to start further pilot projects in 2017.

CAN BARB MEASURE VIEWING ON ALL ONLINE PLATFORMS?

BARB's strategy requires census-level measurement of online viewing for television programmes and commercials. This is made possible by software code that is embedded in online TV player apps. This code can be implemented by any online platform that wishes to be part of the BARB currency.

BARB would consider receiving server data direct from an online platform if it meets BARB's gold standards. Data need to be reportable on average duration audience principles, while there must be independent auditing of the process used to capture, clean and deliver data to BARB.

CAN BARB MEASURE AUDIENCES FOR AMAZON VIDEO AND NETFLIX?

BARB launched a solution for measuring our panel members viewing of non-linear content in January 2016. This could be used by rights owners who distribute content through SVOD services. They simply need to provide a copy of their programme assets to Kantar Media.

This material is added to the audio reference library that's used to determine which programmes have been watched by our panel members. BBC had provided over 300 non-linear assets for inclusion in the library by December 2016.

We are also exploring how router meters can be deployed in panel homes to deliver an aggregate level of viewing to SVOD services.

ONLINE TV: WHAT WE KNOW

In the late summer of 2015, BARB began publishing its weekly TV Player Report, which measures levels of viewing to on-demand and live-streamed content accessed via mobile and online TV player apps. This was the first, and remains the only, fully-audited, joint industry measure of online TV.

The evolution of this research and the ways in which it is being integrated with BARB measures of live and timeshifted viewing is covered more fully on pages 12 and 13; but it's worth looking here at some of the interesting findings to emerge from the TV Player Report in 2016.

And this is also a good opportunity to remind the industry of a new notion underpinning this research: average programme streams.

It's an industry-agreed metric calculated by taking the total time people spend viewing programmes on TV players (across all devices in the reported period) divided by the full length of the programmes.

As a duration-based metric, it's analogous to the well-established BARB notion of average audience.

The measurement of this activity will allow us to derive a new and more comprehensive measure of a programme's audience across all delivery channels.

In some instances app viewing can add significantly to the total audience. Take, for instance, the England versus Wales game at Euro 2016: the event that notched up the largest amount of live stream viewing in 2016, with 523,661 average programme streams. The live TV audience was 7m. In other words, online and mobile viewing boosted the viewing figure by around 7%.

In general, sport is the main driver for live streaming but as our chart shows, the US Presidential election was another notable catalyst.

In contrast, on-demand viewing via apps is driven mainly by drama, but event TV phenomena like The Great British Bake Off and the return of Planet Earth (anticipated as one of the biggest must-see TV moments in recent years) actually took the top slots.

Again, these leading examples added around 6-7% to the viewing figures, though it has to be remembered that these are stand-out performances. The average audience addition will be smaller than that.

And the device-in-use figures are fascinating too. While it's early days, the trend data would tend to indicate that viewing on mobiles increased slightly last year but it still remains, in the wider scheme of things, relatively small.

Intriguingly, the tablet continues to dominate. It will be interesting to see how this holds up. Many in the tech business believe that tablets are falling out of fashion. For instance, according to tracking data from IDC, across the last three months of 2016 global shipments of tablet computers were down for the ninth straight quarter.

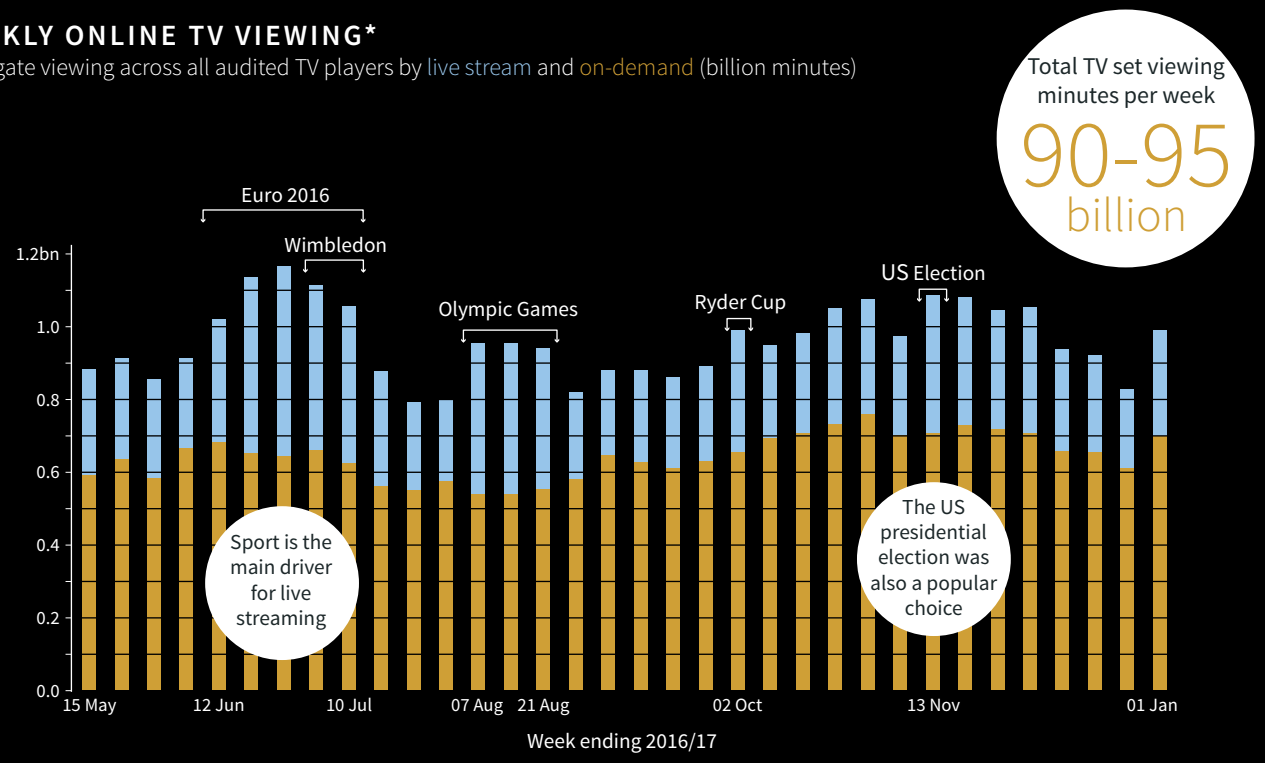
So we'll see. There's a lot happening in this area, lots to explore. But, in terms of establishing viewing levels and patterns in online TV, we've already moved well beyond square one. The next challenge is to fuse these data with BARB gold standard data.

Meanwhile it's vitally important that we keep all of this in perspective. Each week in the UK we view between 90 and 95 billion minutes of television on our TV sets. We only view 1 to 1.5 billion minutes on other devices. This is, as yet, a very small part of the total television picture.

ONLINE TV VIEWING BOOSTED THE ENGLAND V WALES AUDIENCE BY ABOUT 7%

WEEKLY ONLINE TV VIEWING*

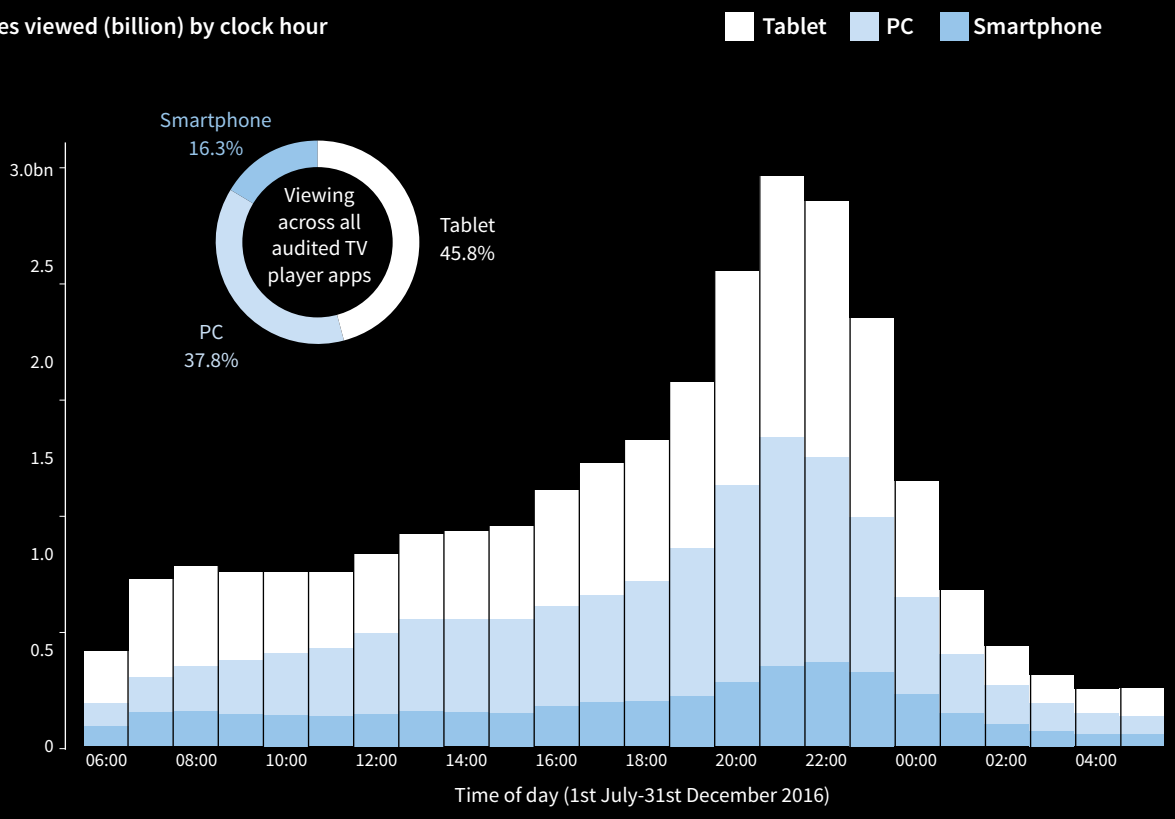
Aggregate viewing across all audited TV players by live stream and on-demand (billion minutes)



WHEN DOES ONLINE TV VIEWING HAPPEN, AND ON WHAT DEVICE?

Aggregate viewing across all audited TV player apps

Minutes viewed (billion) by clock hour



* PCs, tablets & smartphones only
Source: BARB

TOP ON-DEMAND PROGRAMMES*

	Programme	Broadcaster	Average Programme Streams (000s)
1	**Planet Earth II: Islands**	BBC	524
2	**The Great British Bake Off** Series 7: Botanical Week	BBC	481
3	**Eastenders** 24/05/2016	BBC	427
4	**Top Gear** Series 23 Episode 1	BBC	388
5	**The Apprentice** Series 12: Boat Show	BBC	380
6	**Outnumbered** Christmas Special	BBC	367
7	**Louis Theroux: Savile**	BBC	331
8	**The Missing** Series 2 Episode 7	BBC	316
9	**The Night Manager** Series 1 Episode 6	BBC	304
10	**Thirteen** Episode 5	BBC	265
11	**Our Girl** Series 2 Episode 4	BBC	264
12	**Sex, Drugs & Murder: Life In The Red Light Zone**	BBC	263
13	**The Insider: Reggie Yates In A Texan Jail**	BBC	254
14	**Love Island** Series 2 Episode 33	ITV	245
15	**Mrs Brown's Boys** Series 10 Episode 1	BBC	243
16	**Jade: Why I Chose Porn**	BBC	243
17	**Happy Valley** Episode 3	BBC	235
18	**The Only Way Is Essex** Series 18 Episode 1	ITV	233
19	**Frankie Boyle's American Autopsy**	BBC	227
20	**Made In Chelsea** Series 11 Episode 3	Channel 4	227
21	**Cuckoo** Series 3: The Application	BBC	215
22	**Have I Got News For You** Series 52 Episode 6	BBC	206
23	**Unsolved: The Boy Who Disappeared: The Night**	BBC	201
24	**I'm A Celebrity – Get Me Out Of Here!** Series 17 Episode 2	ITV	201
25	**Game Of Thrones** Series 6 Episode 10	Sky	201

*Table only includes single highest rated episode per programme title and sporting event

Viewing to personal computers, tablets and smartphones
Source: BARB TV Player Report 2016 - weekly data

TOP LIVE PROGRAMMES*

	Programme	Channel	Average Programme Streams (000s)
1	Euro 2016: Eng v Wal 16/06/2016	BBC1	524
2	PL: Liverpool v Man Utd Live 17/10/2016	Sky Sports 1	131
3	Breakfast 24/06/2016	BBC1	121
4	I'm A Celebrity - Get Me Out Of Here! 13/11/2016	ITV	119
5	New Year's Eve Fireworks 31/12/2016	BBC1	113
6	EU Referendum - The Result 24/06/2016	BBC1	112
7	Live EFL Cup: Man Utd v Man City 26/10/2016	Sky Sports 1	112
8	The Great British Bake Off Final 26/10/2016	BBC1	105
9	Love Island 11/07/2016	ITV2	98
10	Friendlies: England v Spain 15/11/2016	ITV	79
11	Match Of The Day 13/08/2016	BBC1	78
12	World Cup 2018 Qualifier: England v Scotland 11/11/2016	ITV	78
13	The Apprentice: The Final 18/12/2016	BBC1	69
14	BBC London News 16/06/2016	BBC1	64
15	Wimbledon 2016: Men's Singles Final 10/07/2016	BBC1	59
16	The Missing 30/11/2016	BBC1	58
17	BBC News 02/07/2016	BBC1	57
18	Ten o'clock News 07/07/2016	BBC1	54
19	Olympics 2016 16/08/2016	BBC1	53
20	Election Night In America 08/11/2016	BBC1	51
21	Our Girl 05/10/2016	BBC1	51
22	Weather 10/09/2016	BBC1	49
23	Planet Earth II 13/11/2016	BBC1	47
24	US Election 2016: BBC News Special I 09/11/2016	BBC News 24	46
25	The X Factor Results 11/12/2016	ITV	46

*Table only includes single highest rated episode per programme title and sporting event

Viewing to personal computers, tablets and smartphones
Source: BARB TV Player Report 2016

THE SWINGING SIXTIES

So, it's official. Adults over 65 are becoming increasingly promiscuous - in terms of channel-hopping at least.

And they're bucking the market trend. This is the only age group to have increased the number of television channels it views each week, compared to 2012.

Across the rest of the age spectrum, the trend is downward.

Is this significant? Should broadcasters be worried? And what conclusions can we draw, if any, from the over-65s anomaly?

You could argue it proves there are more channels these days offering attractive diets of heritage programming. ITV Encore, for instance, launched in 2014. But this is to assume that the TV consumption behaviour of the over-65s is significantly driven by heritage programming.

And that might be deemed glibly prejudicial.

But putting aside the trend data for one second, one broad principle seems to hold: the older you are, the more channels you're likely to have in your weekly or monthly repertoire. At some level, this is probably a function of how much time you have on your hands.

But clearly it's the trend situation that will intrigue and perhaps alarm programme planners; and pessimists will probably focus on the age group recording the biggest decline from 2012 to 2016, children aged 4-15.

For many years, children's TV has not been a high priority for the largest commercial broadcasters; and some critics have been bemoaning the possibility that TV's business strategists have forgotten the old adage about catching 'em young and keeping 'em for life. Our figures certainly indicate that children now have the least expansive TV habits.

And yet, though there may be at least a grain of truth in this analysis, it may prove to be less than half the story. It could turn out, for instance, that children aged 4-15 are watching fewer broadcast channels because their attention is focused increasingly on other parts of the TV universe.

After all, we know that homes with children are more likely to buy box sets and to subscribe to subscription video on demand services like Netflix and Amazon. These services aren't (as yet) part of the channel promiscuity picture; so, if you're a big SVOD fan using, say, Netflix as your primary go-to platform, then this will almost inevitably impact on your total channel repertoire.

And in fact, more broadly, right across the demographic spectrum, it's probably true to say that a declining emphasis on live TV will have implications for our range of channel choices. If we're recording ever-greater amounts of programming on our PVRs, there's less motivation (or opportunity) for us to roam around the EPG so much these days.

But let's continue to keep this in perspective: as a nation, on average, we're engaging with just over 19 channels a month. That's hardly blinkered behaviour.

One thing's for sure, these numbers are fascinating; and this is something we'll continue to monitor.

THE OLDER YOU ARE, THE MORE CHANNELS YOU'RE LIKELY TO HAVE IN YOUR WEEKLY OR MONTHLY REPERTOIRE

CHANNEL REPERTOIRE

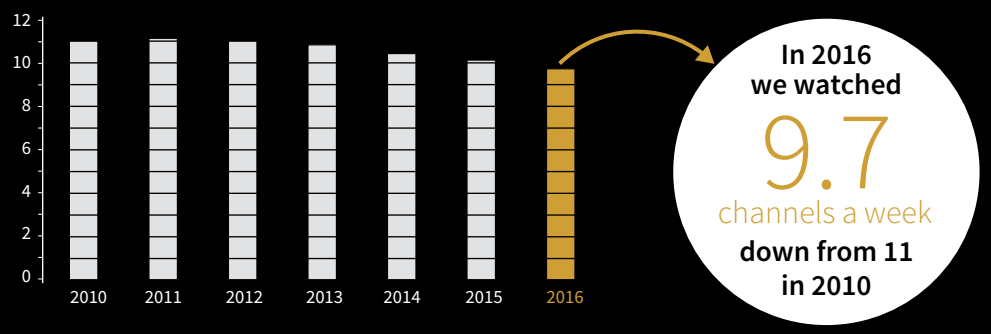
How many channels are we watching (for more than three consecutive minutes)

Per day
3.0

Per week
9.7

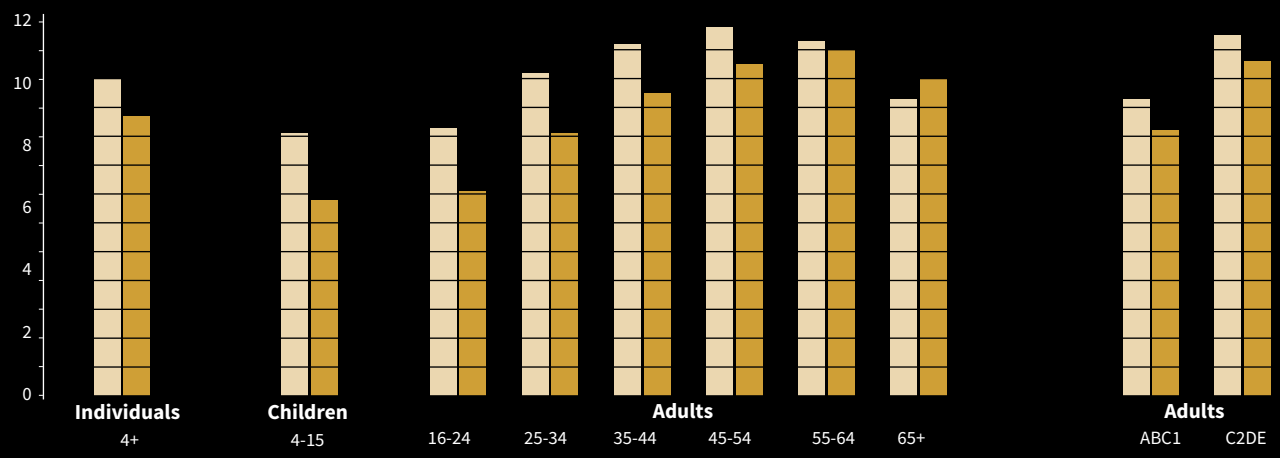
Per month
19.2

Freeview only
Freesat
Virgin
Sky



BREAKDOWN BY AGE GROUP AND SOCIAL GRADE

Number of channels watched per week 2012 2016



Channel selection based on a minimum three minutes consecutive reach.

Source: BARB

GLUED TO THE GOGGLE BOX

There's a fairly widespread notion, not least among those who are only vaguely well-acquainted with the relevant research, that we're falling out of love with our TV sets.

We're not, as our figures here show.

It's worth taking time to absorb this. It's perhaps the single most important revelation in this report.

Over the last few years, you've probably heard about "the death of TV" many times. In some respects it's an easy proposition to fall for, especially if your main sources of information are, ultimately, people whose job it is to sell mobile advertising.

Clearly, at some levels, the manner in which we access audio-visual content is changing. We're now watching more timeshifted content on our PVRs and sometimes the shift involved is considerable (a growth in 8-28 day and 29+ day viewing). We're also accessing catch-up programming through the online media players and the apps of established broadcasters, and via SVOD platforms like Netflix and Amazon Prime.

All of which impacts on the BARB gold standard audience figures, which includes viewing, both live and timeshifted, to programmes that were broadcast in the last seven days. This figure has been declining slightly. In 2016, for instance, it was down 2% year-on-year.

The decline in this headline figure is sometimes seized on as evidence in support of gloomy prognostications about the future prospects for existing broadcast companies. It's also used to argue the case that, if people are still watching audio-visual content, they're increasingly likely to be doing so on laptops, tablets and smartphones.

And of course we're seeing something of that.

But (and this is the bit you might struggle to absorb) we're actually spending more time in front of our TV sets. The increase is marginal: 0.1%. But still, that represents a huge chasm between perception (in some quarters of the industry) and reality.

And yes, there are some caveats to enter here. Some of the time we spend with eyes glued to the TV is time spent playing console games.

Some will also note with interest that year-on-year gold standard viewing is down most significantly against younger age groups: children and 16-24s. But even here it's important to note the small margins we're playing with. Children's total TV screen time was down year-on-year by only 3%.

And the 25-34 age group is particularly fascinating. These are the people whose formative years coincided with the digital revolution. You'd expect this group to exhibit the most radical changes in behaviour. Not so. This age group is, like other adult age groups, spending more time (up 1.4% year-on-year) in front of their TV sets.

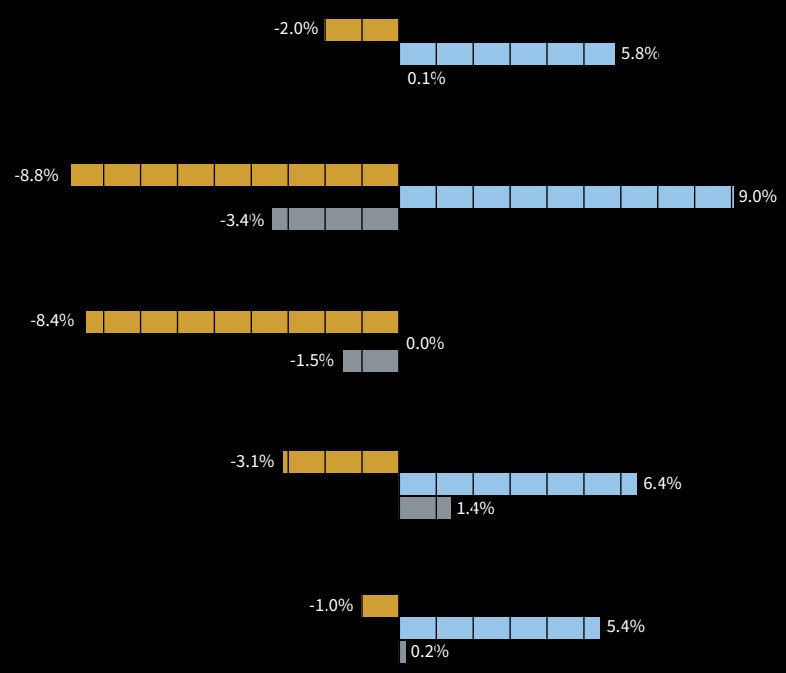
So, to repeat: while there's evidence in our figures of a shift of emphasis away from live and 7-day viewing, there is no evidence here of a fundamental rejection of the TV set per se.

At some point during the course of this year, it's likely that you'll witness someone taking to a conference platform to tell you in all sincerity that young people don't want TV any more. Or if they do, they do it only on their mobiles.

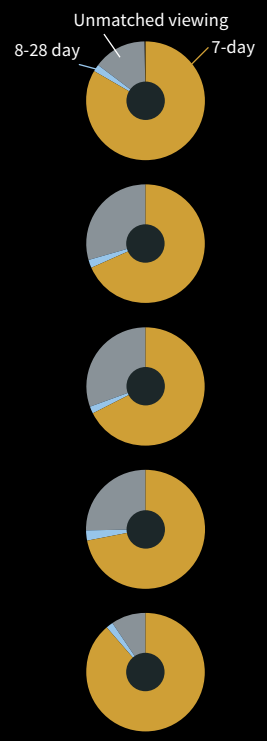
Feel free, when you hear this, to refer the speaker to these pages.

25-34 YEAR OLDS, ALSO KNOWN AS OLDER MILLENNIALS, ARE SPENDING MORE TIME IN FRONT OF THE TV SET

YEAR-ON-YEAR CHANGES (2016 v 2015) IN 7-DAY, 8-28 DAY TIMESHIFT AND TOTAL TV SCREEN TIME



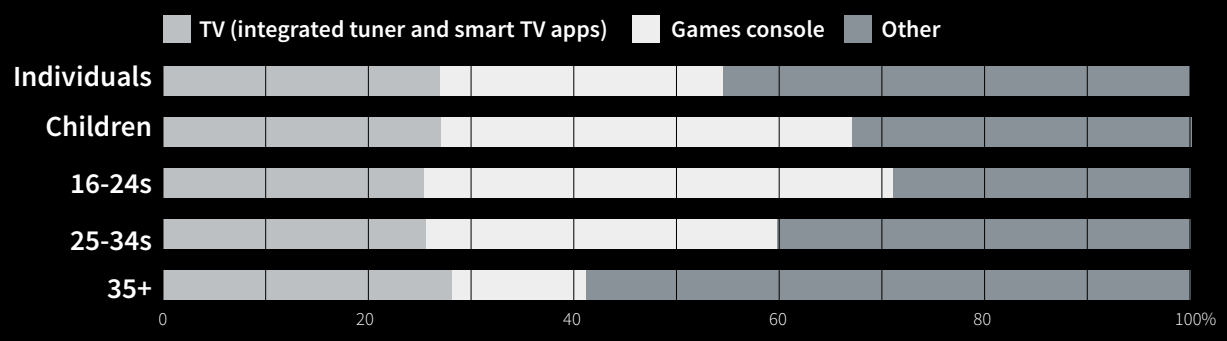
TV SCREEN USE BY TYPE OF VIEWING (2016)



Unmatched viewing includes 29+ day timeshift and viewing non-broadcast material, such as box sets, SVOD services and computer games.

WHAT KIND OF DEVICES ARE DRIVING THE UNMATCHED VIEWING?

Share of unmatched viewing by device, 2016



Source: BARB/Year-on-year Total TV screen time excludes radio listening via the TV set

BRITISH SUMMER TIMESHIFT

The nation's appetite for timeshifted TV continues to grow: in January 2010, just over 6% of viewing was timeshifted; the figure is now over 14%.

Those of us with PVRs tend to do more of it year by year. And that's a trend that's bound to continue, especially as the new kit on the market allows you to record a lot more programming: six shows while you watch a seventh.

And of course there are so many other ways to access timeshifted TV these days, via catch-up players and apps.

So it's increasingly important to stay on top of the detail of timeshifted viewing behaviour. Look, for instance, at the month-by-month timeshift percentage chart. Note the fact that, though the line heads ever upwards, it dips a little each summer.

This despite the fact that we're likely to be out and about more in the evenings, enjoying that perennial British treat, the barbeque summer. So you'd think that the PVR would come into its own in June, July and August.

Except, of course, that much of the must-see television around during those months are sporting events, which are usually more fun to watch live.

Just look at our detailed analysis of last summer's activity: the biggest dips in timeshifted viewing were during Euro 2016 and the Olympics. Andy Murray's Wimbledon exploits were also a factor too.

Generally speaking, however, drama (including series, soaps and single plays) is the genre with the most timeshifted viewing. And all the blockbuster drama and entertainment shows tend to be held back until the autumn.

Time-poor segments of the population are the most enthusiastic timeshifters. The 25-34 age group, it's worth assuming, either plays hard or works hard or both. And long commuting times in London and the South East are probably a prime factor in pushing these regions to the top of the regional bar chart.

Our primary focus is, as always, the 7-day timeshift viewing figures that are consolidated with the live figures to make up the BARB gold standard. But this only tells part of the story. Within BARB data, it is possible to look at viewing beyond even 28 days via our Sky+ data. This helps us understand how much we record and keep to watch back at a later date.

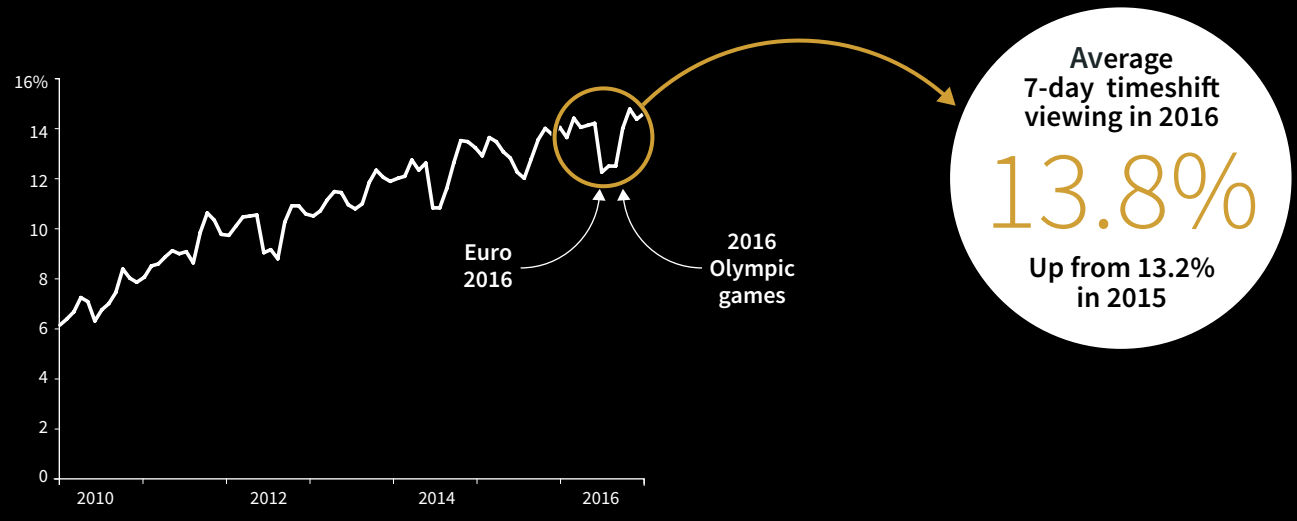
These figures represent a relatively small slice of overall viewing but they are utterly fascinating. Unsurprisingly, the sorts of programmes people tend to hold onto in perpetuity include cult epics like Game of Thrones, feature films generally and, most of all, timeless children's shows. In 2016, for instance, the most watched programme from timeshift's long tail was Stick Man, first broadcast on Christmas Day 2015.

This is much-loved deep-archive TV and as such, by and large, it's a shared experience: 56% of 29+ day timeshift is played back with more than one person watching.

We say by and large, because the oldest recorded programme watched last year was an edition of DIY SOS from July 2003. This, surely, is the most conclusive evidence we have ever produced in support of the proposition that it takes all sorts.

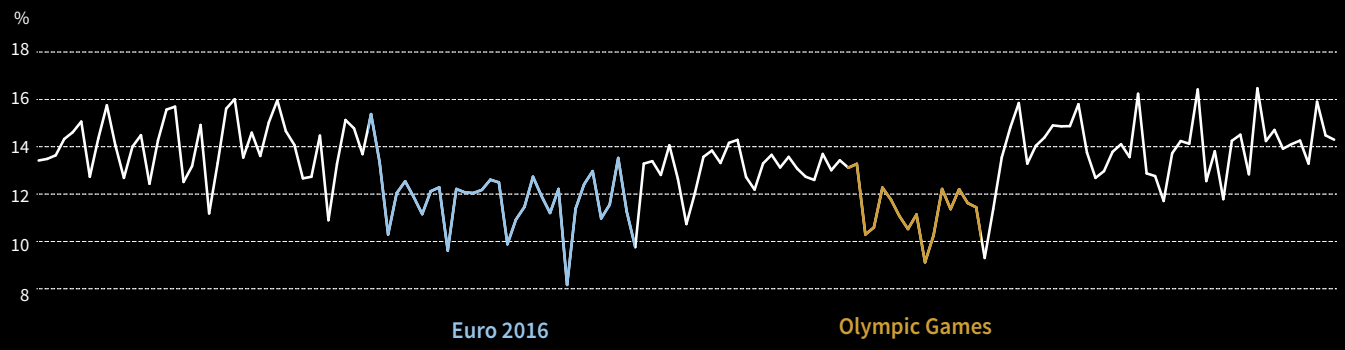
SUMMERTIME, AND THE VIEWING IS LIVE. SPORT'S ON TELLY AND THE DRAMA'S AWAY

WE CONTINUE TO WATCH MORE TIMESHIFTED TV

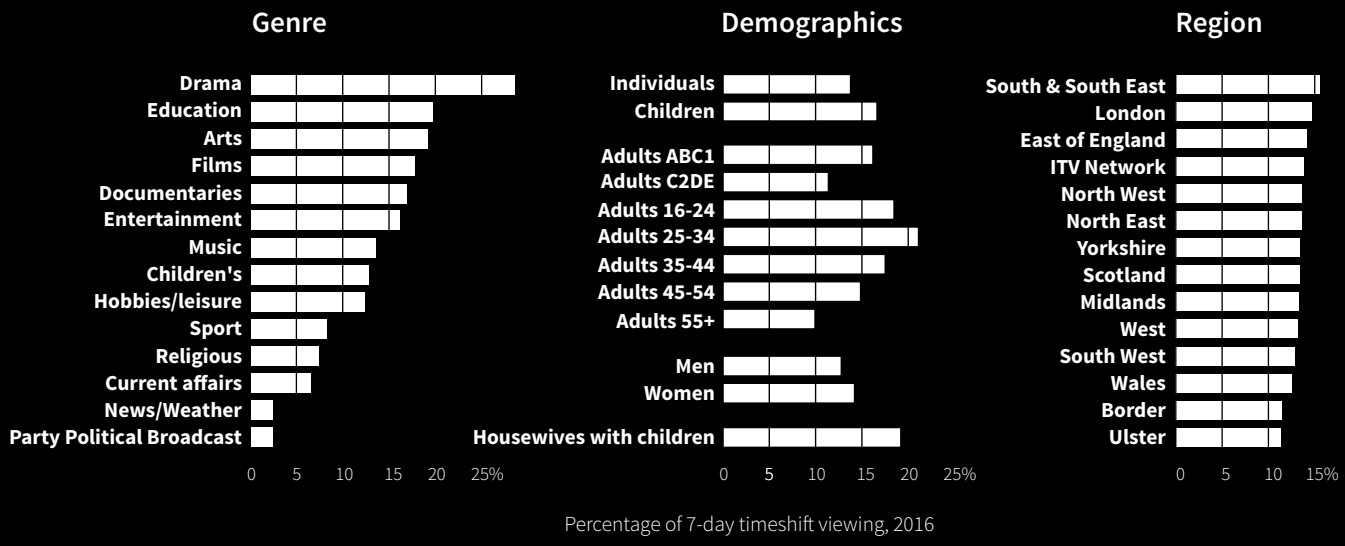


SPORTING EVENTS REDUCE TIMESHIFT VIEWING FIGURES

There was an evident dip in June and August due to the Euro 2016 football tournament and the Olympic games



TIMESHIFTING BY...



Source: BARB

MAKE CAKE NOT WAR

2016 was a year we'll never forget. Where were you when you heard the Referendum result? Who told you Trump had actually won? And if you weren't already watching TV, wasn't it your first instinct to get yourself in front of one?

So, all in all, you'd quite naturally assume 2016 was likely to be a good year for factual programming: news, documentaries, current affairs. And yes, they all increased their share of viewing year-on-year. But not by much: a tenth of a point in each case.

But then that's probably because news and related genres were already on a high in the previous year's genre share figures, thanks to a (not entirely unexpected) boost around the time of the 2015 General Election. Factual TV represented 25.6% of viewing in 2014, 27.0% in 2015, 27.4% last year.

And there are those who argue there's a continuing opportunity to consolidate these recent gains. 2016 was, famously, the year of fake internet news, which might just deliver a hugely welcome competitive advantage to TV. Thanks to the antics of a handful of maverick online news outfits, TV's stock as an honest news broker has never been higher. It will be fascinating to see if this translates into even higher viewing figures.

Meanwhile, TV's primary role is as it ever was: to keep us delighted, amused and imaginatively stimulated. In other words, we continue to watch a large amount of drama, films and light entertainment, with these categories adding up to 42.3% of viewing.

Intriguingly, though, all these categories seem to be in long term decline.

Drama, for instance, including series, soaps and single plays, notched up a share of 20.2% back in 2008; but it has lost ground in every year since. Perhaps this is because it's the part of the genre spectrum under most pressure from new delivery options. Thanks to increased competition from SVOD platforms like Netflix and Amazon, plus the growth in popularity of box sets, viewers have a far greater range of ways to access big-budget narrative TV these days.

The films category, as we have noted in past reports, has declined as a mass audience proposition over the years. So many of the big premieres are on pay-TV, where the audiences tend to be smaller than on free-to-air.

Meanwhile, entertainment has been on something of a rollercoaster ride over the last decade or so; and potential volatility in this genre is perhaps encapsulated by the story of The Great British Bake Off. An unlikely flagship proposition when it launched in 2010, it was one of British TV's biggest shows last year. Now, with its move to a new home, it may have to prove (pun only half-intended) itself all over again.

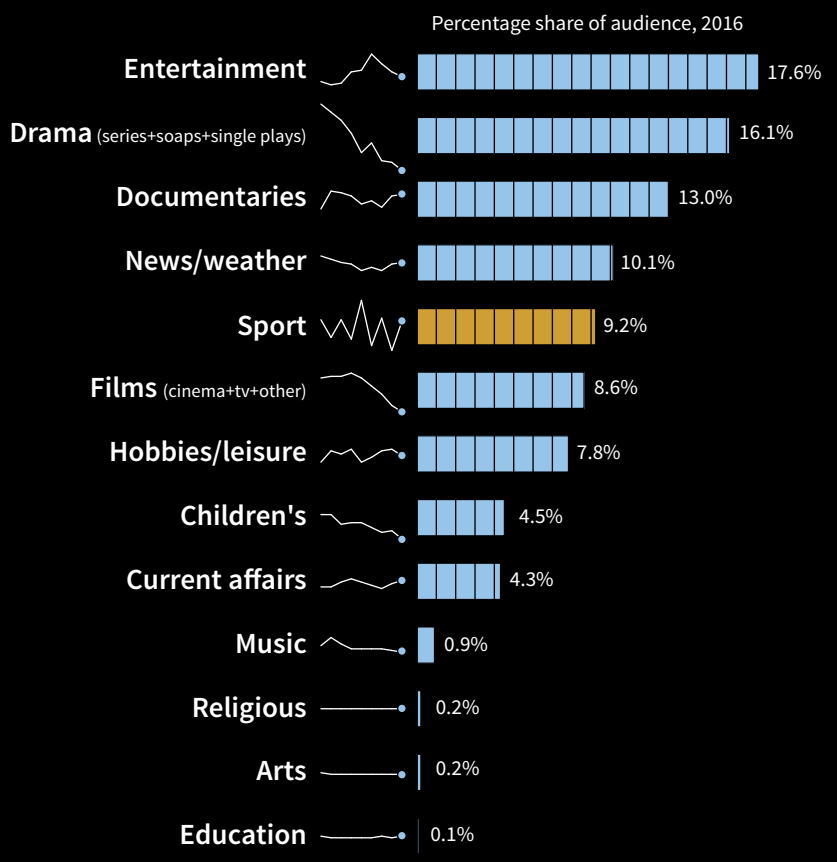
In contrast, sport exhibits a far more predictable volatility. In audience terms, it's television's yo-yo genre. It took a 9.2% share in 2016. We can confidently predict that it will be back down to around 7.5% in 2017. That's because odd-numbered years are relatively quiet compared to even-numbered years, which offer up either a FIFA World Cup or an Olympics coupled with a Euro football tournament.

So, forget Trump. Where were you when that first Iceland goal went in against England? Or when Sam Vokes glanced that glorious header beyond Courtois?

THE GREAT BRITISH BAKE OFF HELPED ENTERTAINMENT CATEGORIES TO PREVAIL OVER FACTUAL PROGRAMMING

THE GENRE RANKINGS

Trend in % share of total TV viewing, 2008–2016



SPORT STATS

Big sporting events are watched by a huge number of people*

The Euro 2016 football tournament reached

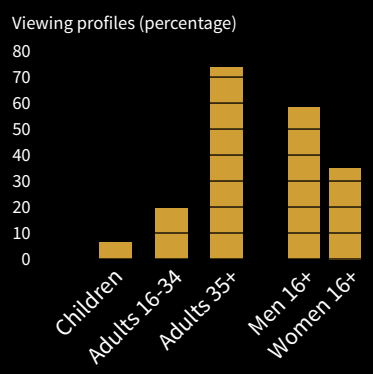
50.4m

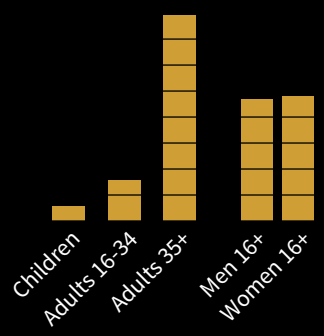
The Olympic Games reached

50.2m

*All individuals aged 4+ that viewed for at least three consecutive minutes

Euro 2016 skewed heavily male while the Olympics was more balanced





Source: BARB

PORTFOLIO PLANNING

It's not every year that a major broadcaster radically reconfigures one of its flagship assets. Back in February 2016, BBC Three ceased to exist as a linear broadcast TV channel and became an internet-only phenomenon, with its content available for streaming via BBC iPlayer and social media platforms.

So of course we were intrigued to see how this would impact on the viewing share league table. In 2015, BBC Three had a 1.1% share of viewing. Surely, many people reasoned, its departure from the EPG would impact directly on the BBC family proposition as a whole.

Well, were the naysayers right? The short answer is… sort of. The BBC's collective share slipped by 0.7% in 2016, so not as much as BBC Three's share in 2015. That said, we should remember that these audience share figures don't yet include viewing through PCs, tablets and smartphones.

It's a salutary reminder that this isn't a simplistic zero-sum game: viewer behaviour is fiendishly difficult to model or predict. Because of course we may feel loyalty not just to programmes and channels but to broadcast companies and institutions too.

As indeed is evident when we look at the bigger picture and the table as a whole. The 2016 rankings contain exactly the same broadcaster groups as last year's, and they're pretty much in the same order. The only substantive change sees Sony and Discovery swap places.

The year-on-year changes in share are minimal. And the first five channels on the EPG still command just over 52% of UK viewing. It is, in short, a picture of stability and continuity. On this evidence, Britain's TV execs are peerless portfolio managers.

ITV is a great case in point: its flagship channel is down slightly but that's more than offset by creditable performance elsewhere in the group. Its overall figure is actually up.

Meanwhile Channel 4 continues to hold its own while fulfilling a tricky remit to be innovative and challenging while being commercially funded by advertising.

And we're seeing the continuation of a fascinating story in mid-table. For the last few years the rivalry between Sky and Viacom has been nip and tuck. Both are clearly ambitious companies that see potential for growth in the UK - and both have high hopes of closing in on a top three place. But there were no fireworks here in 2016. Sky is down a fraction, Viacom is up a sliver, and the gap between the two, which was small last year, has now closed.

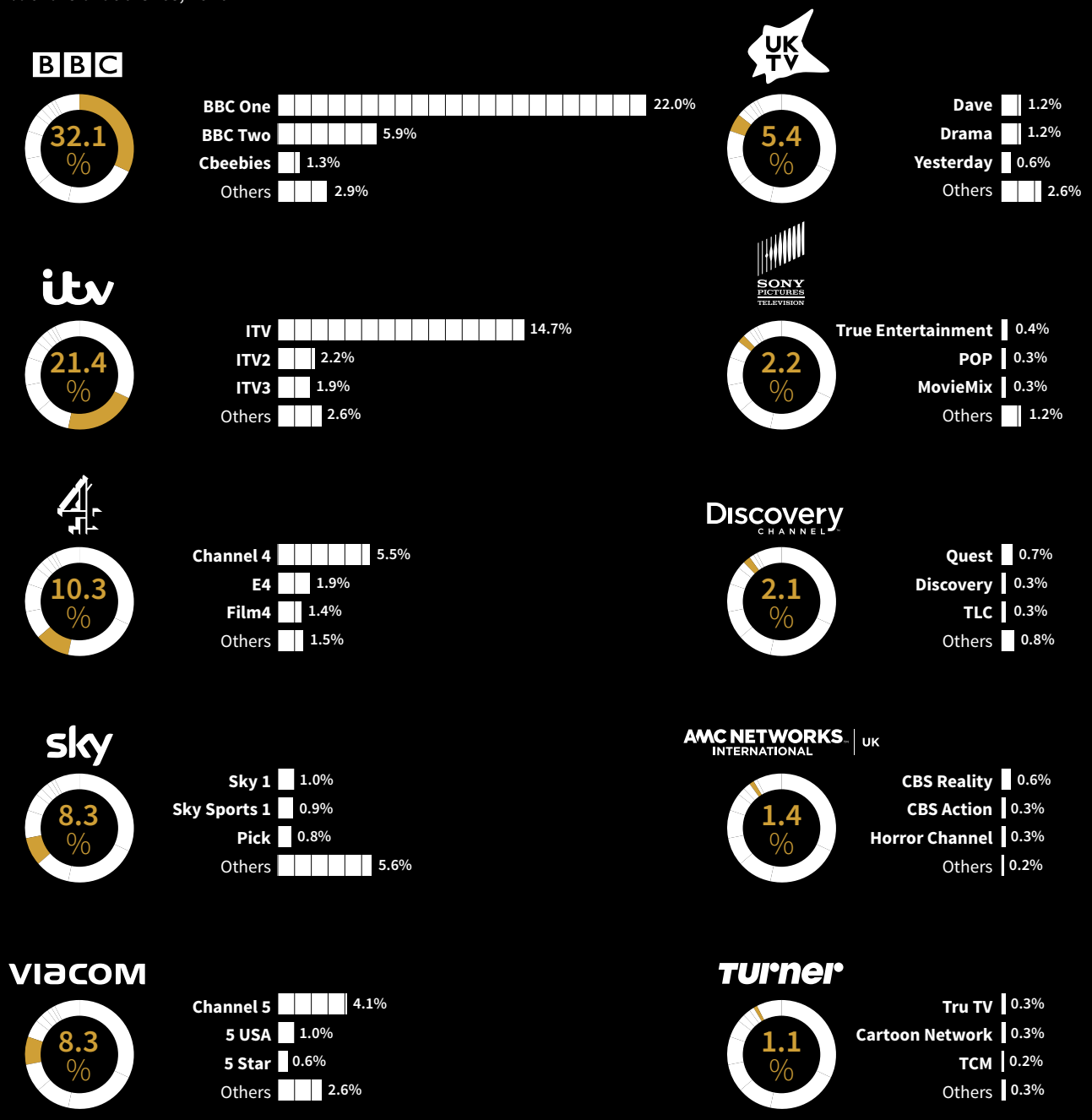
Meanwhile, the group showing the greatest year-on-year improvement was UKTV, up one-third of a point. This is surely a ringing endorsement of its portfolio management (it boasts 11 channels) and its ability to knit schedules together from distinctive new commissions alongside shows originally aired on the BBC, ITV and Channel 4.

AMC, which claimed a place in the top ten for the first time in 2015, has retained its place at number nine. Turner can view this table with satisfaction too. It narrowly missed out on the top ten in 2014 but re-entered the chart last time. Retaining its place at number ten is no mean achievement.

THIS ISN'T A SIMPLISTIC ZERO-SUM GAME: VIEWER BEHAVIOUR IS FIENDISHLY DIFFICULT TO MODEL OR PREDICT

TOP TEN BROADCASTER GROUPS

% share of audience, 2016



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

Source: BARB

CLOSING THOUGHTS

It's been another eventful year for television, and television viewing. As we've seen in this year's report, we're certainly not falling out of love with the TV set. We're spending as much time in front of the TV set as last year although what we're doing with it is changing. And for BARB, it's important to make sure we keep understanding how and what people are watching.

The Great British Bake Off took the crown again for most popular programme. This was in no small part helped by the viewers' ability to catch up with the programme via their own recording device or through BBC iPlayer. So much so that of the 13.5m people who watched the second episode in the series, 6.2m did not watch it live - a new UK record for a timeshift audience.

We've also seen how timeshift is no longer just constrained to the last seven days. From our Sky+ data, we can see viewing from recordings as far back as 2003 and how viewing to recordings of Stick Man on Christmas Day 2015 throughout 2016 added an extra 709k to its 28-day audience, which proves the longevity and power of recording on our PVRs.

Possibly one of the most interesting insights from this year's report was the finding that we're becoming choosier in the number of broadcast channels we visit on a weekly basis. This will in part be driven by more viewing opportunities on the TV set that don't conform to a broadcast channel, such as an SVOD service, although this decline is also a potential sign of increased channel brand effectiveness.

On the one hand this is great for channels looking to attract specific audiences, such as science fiction geeks like me, yet it may pose issues for more generalist entertainment channels. How can you expose viewers to programming they might not normally choose if they are spending less time navigating around the EPG? The topic of how channels are positioned on the EPG and how on-demand services are promoted alongside linear channels is one that will gain traction in the coming years.

We hope you have enjoyed this year's report and the insight we've delivered.

If you have any questions regarding this report, or would like further information, then please get in touch.

Joe Lewis
Head of Insight, BARB

This summer, BARB will begin new Reboot training sessions to augment the current Boot Camp programme. Reboot training will cover more about our data and help you understand their potential, including how new developments will shape the future of the BARB service.

Reboot sessions are free to BARB customers and held at our offices in central London.

In the sessions, we will cover the following aspects to help you get more from our data.

- What demographics do we collect from our panel?
- How are the BARB data structured and how can they help you analyse TV viewing?
- Tips on segmenting and creating dynamic audiences.
- Using the BARB Establishment Survey to understand your potential audience and size.
- How are SVOD services growing and overlapping with TV platforms?
- Project Dovetail: How will it work and what will you get?

To find out more, please contact **reboot@barb.co.uk.**

FIND OUT MORE

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 now includes further details about our plans for the future.

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.

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