

Bulletin

This issue contains some updated future scenarios, an outline of the commencement of VOD reporting and analysis of viewing in 2008, as well as highlighting aspects of the relaunched BARB website.

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Future Scenarios

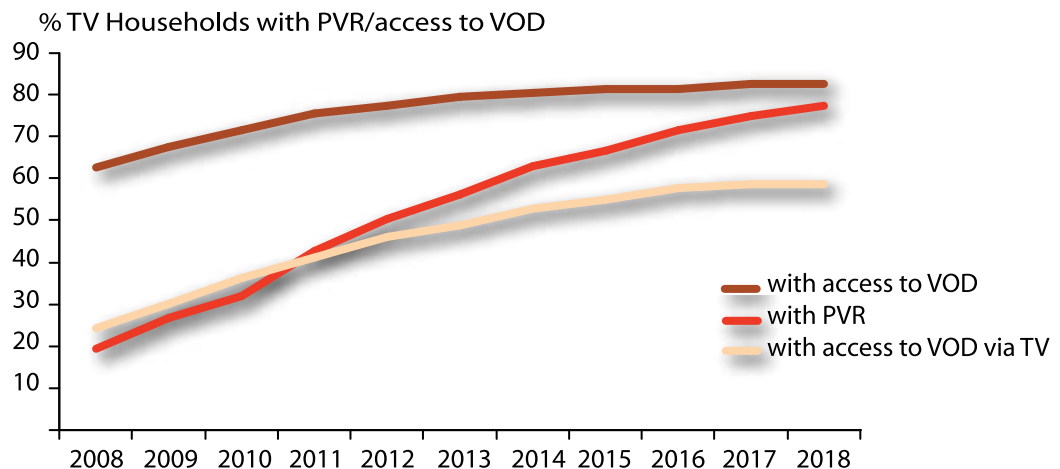
The development of new ways to watch television is a key feature of the industry currently and is likely to continue for the next few years. BARB is considering the possible impact of new technologies from the perspective of audience measurement.

The current panel-based system for TV audiences has developed over the years to accommodate changes in the TV landscape. Past developments, up to the introduction of PVRs and HD, have tended to focus around the television set. Future innovations based around the TV set should, at least in principle, also be measurable by the current method (with appropriate enhancement).

There are now, however, opportunities for viewers to watch programmes away from a TV set: for example via a PC or laptop, handheld device or mobile phone. So far, these have been taken up to varying degrees but all require the development of new techniques if audiences are to be measured. Predicting the speed of adoption of new technology among viewers is not easy; a wide range of different future scenarios is possible. The charts that follow summarise just one of these possible scenarios.

The growth of PVRs has made the time-shifting of viewing much easier and the proportion of viewing that is time-shifted has grown as a result. Currently, around 20% of TV households have a PVR, suggesting plenty of potential for future growth. One assumption of this scenario is that the uptake of PVRs with digital terrestrial tuners will increase significantly, stimulated in part by the process of digital switchover.

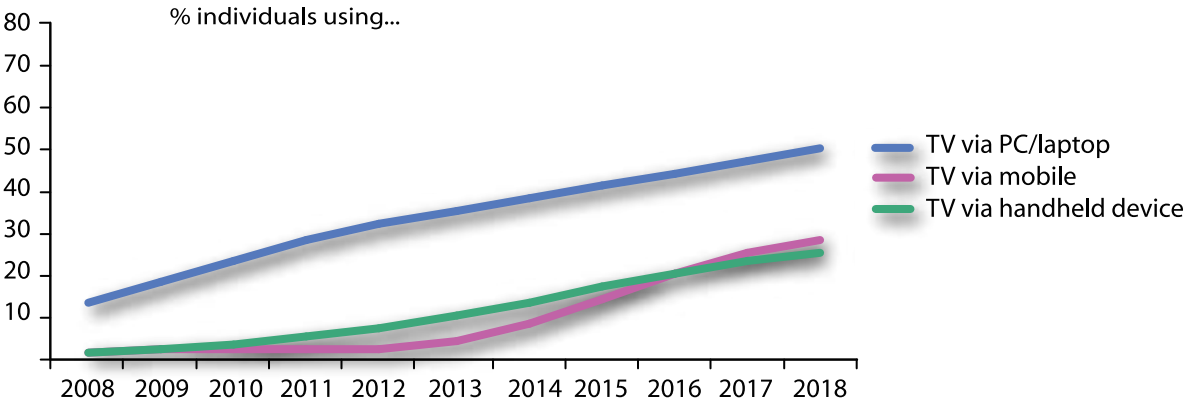
Chart 1: PVRs and On-Demand



Video-on-Demand (VOD) is another option for time-shifting. A wide selection of recently transmitted programmes is available via PC/laptop on broadcaster websites; thanks to the fast growth of broadband internet these services are already available to a large majority of the population. Availability of VOD via TV is currently more limited but likely to grow substantially over the next ten years.

Of the new forms of viewing available beyond the conventional TV set, it is viewing via PCs/laptops that has been most widely adopted so far. According to an Ipsos Capibus survey in November 2008, take up of mobile TV services has been limited and may be partly constrained by the technology available. Post digital switchover, frequencies may become available to allow the launch of true broadcast-to-mobile services; this may stimulate growth in use of mobiles for TV services post-2012. Use of other handheld devices to view TV is hard to predict; as before survey data suggests that presently this is only done by a small proportion of the overall population. It is important to bear in mind that take up of new technologies is likely to take place at different speeds in different sections of the population. Broadly speaking, younger adults might be expected to adopt new services more quickly than older age groups.

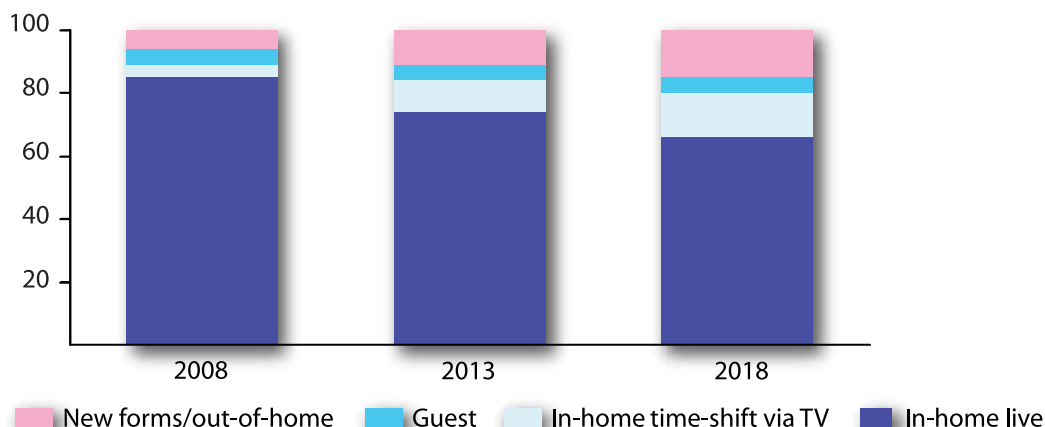
Chart 2: New Forms of Viewing - Individuals



Combining these estimates of possible future take-up, with estimates of the amount of usage, allows a view to be taken on the impact of new forms of television on the overall split of viewing between different types. This is summarised in Chart 3 which shows how TV viewing time breaks down across four types: live in-home viewing; time-shifted in-home viewing; guest viewing and finally other forms of out-of-home viewing, together with new forms of viewing (via PC/laptop, mobile, etc). Within this split the first three types of viewing can, in theory, be captured via the current fixed meter-based measurement but the final category cannot.

Looking at all individuals in 2008, live in-home viewing is estimated to account for 85% of the total, time-shift via TV 4% and guest viewing 5%; the remaining 6% comprises other out-of-home viewing and new forms of viewing. So the estimate is that the current peplemeter method is able to cover 94% of all viewing but 'misses' the remaining 6%.

Chart 3: Individuals Viewing by Type, 2008-2018



Source: BARB and Ipsos Capibus Nov '08

By 2018 the split is predicted to be as follows: live in-home viewing now only accounts for 66% of the total; time-shift has grown to 14%; guest viewing remains at 5%. Under this scenario 85% of all viewing in 2018 would in theory be measurable via peoplemeter, while growth in new forms of viewing would mean that the proportion unable to be captured would increase to 15%.

BARB has been testing techniques which may open up the measurement of new forms of distribution and is focussed on what such new techniques could deliver and how they may be able to be combined to provide more comprehensive measurement for the future. Consideration is being given to what value there is in BARB adding different options to the service and the development that will be required to pursue some of these routes.



BARB Website Relaunch www.barb.co.uk

The new look BARB website went live at the end of 2008. It has been rewritten in an up-to-date code to facilitate additional features and improved functionality.

In particular, the Weekly and Monthly Viewing sections have been redesigned for ease of navigation and accessing back data, available from 1992. The Top 10s now contain top 10 programmes for all BARB reported channels and the Top 30s include the top 30 programmes across multi-channel broadcasters. The trends graphs allow the selection of several years of data, or a specific channel. The FAQ section has been expanded and the BARB Bulletins have been separated from the News section and are available to download.



VOD Reporting

Time-shift viewing now arises in two main ways, via recording or via a Video-on-Demand (VOD) service.

The BARB system has, since 1991, reported 7-day time-shift viewing from broadcast transmissions as part of consolidated viewing figures, initially via VCR playback. In 2006 Sky+ DTR playback reporting commenced on the same basis. From 2006 material played back on other types of DTR equipment has been reported, including DVD-Recorders. This has ensured that reported viewing from homes with recording devices has developed, prompted by an increasing variety of playback equipment attached to TVs.

New forms of distribution are expanding the availability of televisual content. A number of service providers now offer access to material (that has been broadcast within the previous 7 days) on-demand via set top boxes. From 15 December 2008 BARB has been incorporating this “catch-up” on-demand viewing on the Digital Cable (DCab) platform in published data if it exactly matches a scheduled broadcast. The number of homes monitored in this way has been progressively increasing on DCab.

In order for commercials that are played-out with on-demand content to be reported, the commercials, sequence and timing need to be identical to the original broadcast. If the commercials are different they will not be reported. Similarly if there is any difference in the remainder of the content from the original broadcast that unmatched part will not be reported.

The BARB 2010 service, currently in set-up phase, is also being developed to be capable of reporting VOD TV content. All meters installed in the new panel homes will have the capability to capture time-shifted viewing from scheduled broadcasts, including all PVRs, “catch-up” VOD options (as described above) and Sky Anytime.



BARB 2010 Service

Click on the “BARB 2010” box on the home page of the BARB website, www.barb.co.uk, for information about progress since the award of the 2010 Contract on 17 December 2007.

Find out about the number of installed panel homes and confirmation of the finalisation of file specifications and calculation procedures and the development of processing routines.



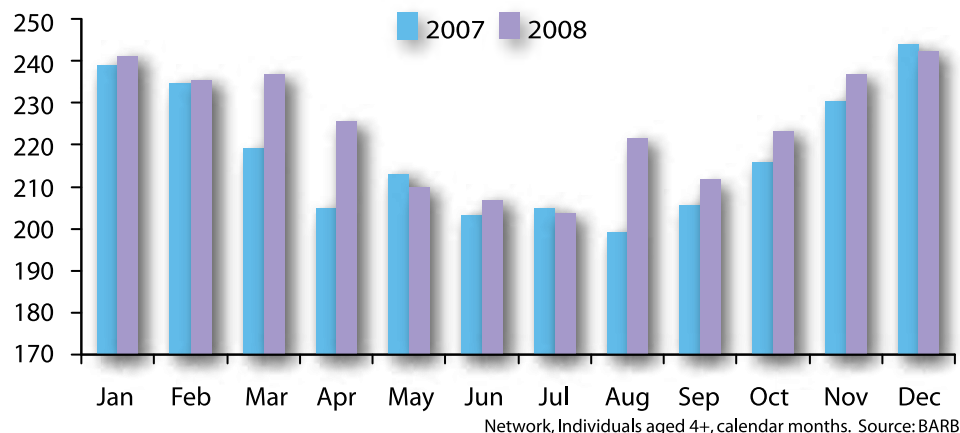
2008 Viewing Analysis

Average daily television viewing among Individuals aged 4+ reached 3 hours 45 minutes per head in 2008, a 3% increase on 2007 and the highest level seen in recent years.

Chart 4 shows the seasonal pattern of viewing throughout the year. The normal pattern of higher viewing in the winter months and lower levels in the summer months is evident in both years but there were some large year-on-year increases in some months, notably March, April and August. Differences in weather between the two years is likely to have played a part in these large changes, with poor weather tending to produce higher viewing levels. April 2008 was in general a cool, wet month, whereas April 2007 was the warmest April on record.

August was an exceptionally wet and dull month for most of the country and coverage of the Beijing Olympics is also likely to have contributed to the large year-on-year increase in viewing in this month.

Chart 4: Average Daily Viewing by Month, 2007-2008



Another interesting aspect of the year was the continuing increase in the levels of time-shifted viewing, driven by further take-up of digital recorders and PVRs. Time-shift accounted for 4.1% of total consolidated viewing among All Individuals 4+ in 2008, up from 2.7% in 2007.

BARB

We always encourage feedback, so do tell us what you think
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