

Bulletin

This issue details newly reported services and provides analysis from the latest survey of other forms of viewing. There is an outline of BARB R&D priorities and a reminder of information relating to the development and testing of the 2010 BARB service including, for broadcasters, a call to action.

- ▶ Reporting “catch-up” VOD via STB
- ▶ Other Forms of Viewing – Latest Survey
- ▶ Development – Priorities for BARB
- ▶ BARB Service 2010 – Are you ready?



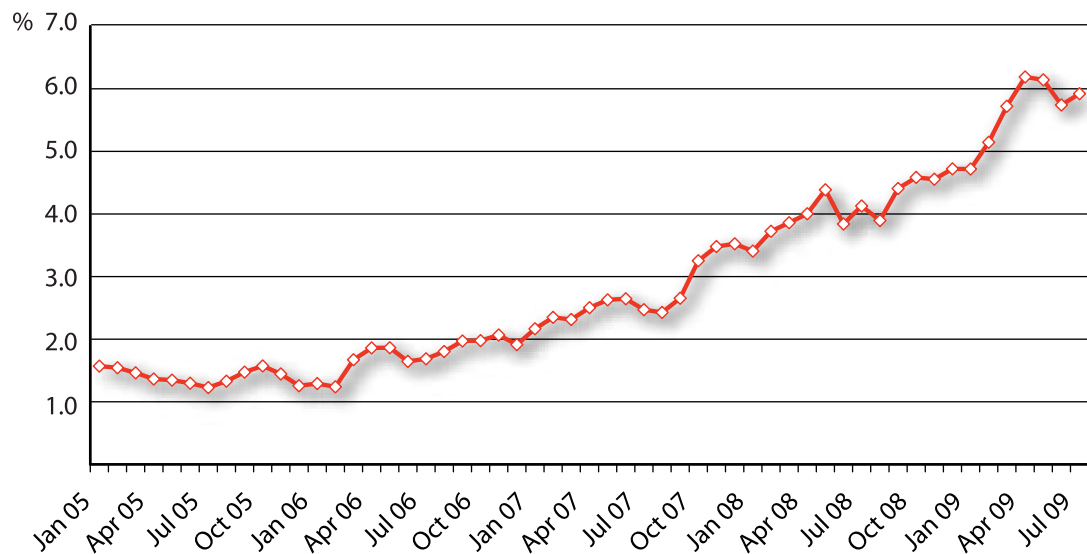


Time-shift viewing and VOD measurement

Time-shift viewing has been measured within the BARB service since 1991. Initially this covered playback from VCRs but in recent years new measurement techniques have been developed to capture new types of time-shift viewing. In 2006 the measurement was extended to report playback via digital recorders (such as Sky+ and DVD recorders) and at the end of 2008 was developed further to include viewing to video-on-demand (VOD) services available via TV set-top boxes.

Over the past four years time-shift viewing has accounted for an increasing proportion of total TV viewing (see chart below). This has mainly been driven by the rising penetration of digital recorders. In July 2009 time-shift amounted to 5.9% of total viewing, up from 1.2% in July 2005.

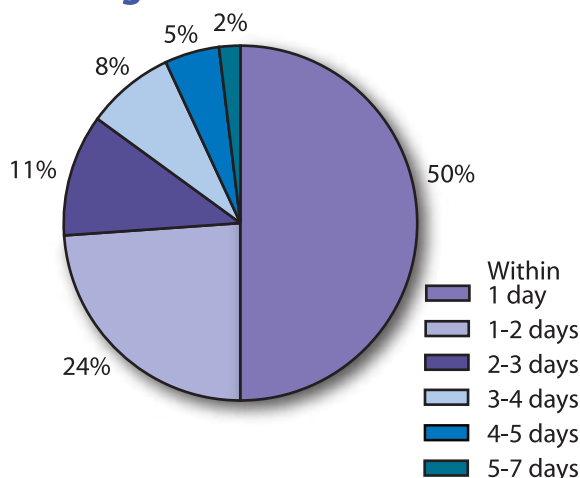
Time-shift as % of Consolidated Viewing



Network, Individuals aged 4+, calendar months. Source: BARB

The measurement of VOD is restricted to "catch up" VOD services provided by broadcasters of recently transmitted programmes. If the VOD viewing takes place within seven days of transmission it is included within the consolidated audience to the broadcast programme and channel as time-shift viewing. At present this is confined to households equipped with AGB Nielsen's Unitam meter (currently approximately 70% of digital cable homes on the panel have

Time between VOD viewing and original transmission



Source: BARB/AGB Nielsen Media Research

this meter). From the beginning of 2010 it will cover all digital cable households. From 1 July 2009 catch-up VOD via Sky Anytime has also been included in channel viewing.

It is not possible to separately identify VOD viewing within published BARB datasets. A one-off analysis of a sub-set of c500 digital cable households where VOD measurement is enabled covered the 4 weeks ending 29 March 2009. This showed that, on average, 23% of individuals within these households viewed some catch-up VOD content within a week and 39% viewed at some time over the 4 weeks. Viewing to catch-up VOD accounted for 1.4% of total viewing within these households.

The data suggest that viewers tend to watch catch-up VOD programming fairly soon after broadcast. The pie chart shows the time elapsed between VOD viewing and the original transmission; half of all VOD viewing within 7 days happens within 24 hours of broadcast and almost three-quarters within 2 days.



Other Forms of Viewing

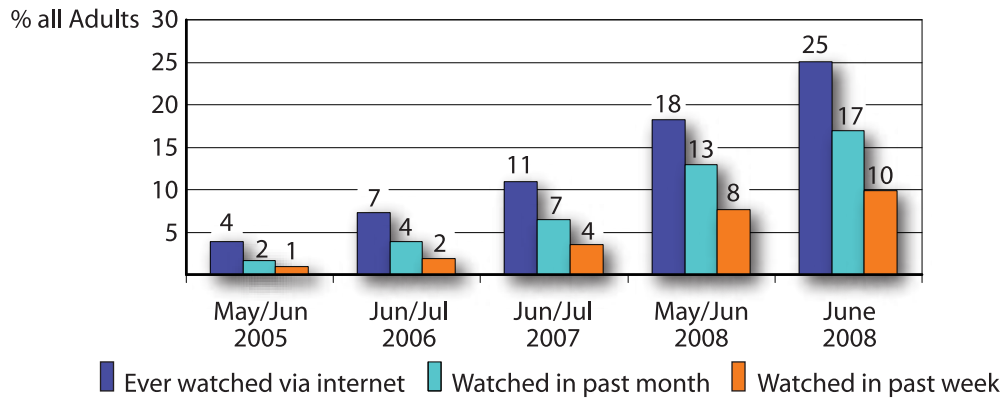
Broadcasters have continued to develop services to deliver TV programmes online, allowing consumers to watch a wide range of recently broadcast programmes.

Viewing that takes place on a PC or laptop is not currently captured within the TV audience measurement service and requires the development of new measurement techniques if it is to be monitored. Separately BARB has tracked the use of online TV services over the past four years via a short questionnaire on an omnibus survey, which has given a top-line view of the extent of take-up. The latest wave of this research was carried out across 5-18 June 2009.

The growth in use of online TV is shown clearly in the top chart. In June 2009 a quarter of adults claimed to have watched TV via the internet at some time, up from 18% a year before and just 4% in 2005, when the easy-to-use services were not as readily available. The proportion of adults claiming to view via the internet in the past week reached 10% this year, vs 8% in 2008.

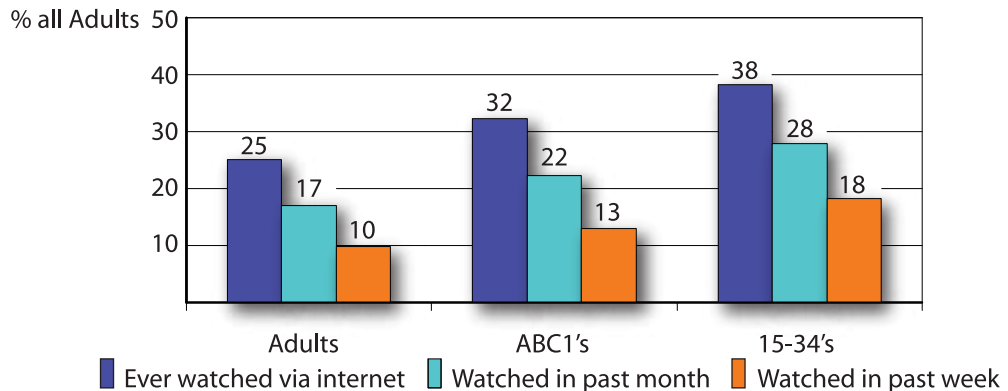
Higher proportions of ABC1 adults and 15-34 year olds view online, as shown in Chart 2. This has been a consistent finding across all waves of the research. Among ABC1s, 32% claimed to have watched online at some time, 22% in the past month and 13% in the past week. For 15-34s the proportions were 38%, 28% and 18% respectively.

Trend in Viewing of TV via Internet



Source: Ipsos MORI Capibus

Trend in Viewing of TV via Internet June 2009



Source: Ipsos MORI Capibus, 5-18 June 2009. Base: 4029 adults

Adults viewing online in the past week (10% of the population) claimed to spend approximately an hour and three-quarters doing so across the week. Scaled across the whole population this suggests an average for all adults of 0.17 hours, or approximately 10 minutes per week. Average viewing via standard TV sets over this period stood at 26 hours per week among adults. Among 15-34 year olds average online viewing time was much higher at approximately 23 minutes per week, relative to an average via standard TV sets of over 19 hours per week. This suggests that online viewing might account for roughly 2% of all viewing by this age group, but under 1% across all adults.



Development Priorities for BARB

BARB's development agenda is driven by "broadcast" content and its R&D programme is focused on exploring the feasibility of providing additional reporting of content which falls outside the core BARB output.

In recent years, BARB has continued to consider the future potential needs of the measurement of TV content. This has led to R&D activity in order to examine new potential measurement techniques as they have become available, to develop views on the nature and scale of possible future influences and conceptual thinking regarding the measurement challenges of the future and options for methodologies, systems and approaches.

Early in the BARB 2010 Service it will be planned to incorporate a separate non-linear database, initially in a 'pilot' mode. 'Recently broadcast' material which is anchored on a "recent" transmission (number of days to be defined) is planned to be able to be included, as is other content which is "from the archives". Initially this will relate to material viewed on a TV set.

BARB will continue to seek to find the means of detecting and reporting content viewed on PCs and laptops that is suitable for integration with TV audiences data. The current focus includes an ambition to establish a small test 'hothouse' panel to confirm the ability to report PC/laptop viewing. Results of such further testing will determine feasibility of extending BARB measurement to incorporate such viewing.

In relation to viewing via the web to TV style content, several metrics are already available that enable organisations (e.g. broadcasters) to have some appreciation and understanding of their own services - but they relate generally to: requests, or 'streams started', and to machines that these requests have originated from, or to, which the streams have been delivered.

BARB is and has been seeking solutions that go beyond this - particularly being able to add a duration element (for amount of viewing) and a people element (relating to who is viewing). A number of techniques have been tested, but BARB has not yet been able to confidently identify one that performs in the desired way.

BARB necessarily has to take a considered approach - including about whether a technique could affect current BARB measurement (for example impacting respondent participation rates) - and obviously retaining the quality of the existing BARB measurement is a high priority.

More detail on BARB's R&D priorities and recent activity is available on-line at www.barb.co.uk



Broadcasters - Are You Ready for BARB 2010?

Transmission and Spot As-Run Logs

Have you downloaded the specifications from TNS's website?

Are you sending test files to TNS yet? Don't run the risk of your logs being rejected because you are not prepared. You will be required to submit logs to an FTP site. Please note that **emailed logs will not be accepted in the new service.**

Sponsorship

Are you preparing to supply information for all sponsored content?

Regional Definitions

Become familiar with the new non-overlap net BARB regional geography.



BARB Service 2010

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 Contracts on 17 December 2007.

The BARB 2010 page is updated periodically to keep stakeholders in touch with the status of the implementation.

BARB

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