



THE VIEWING REPORT

Our annual exploration of the
UK's viewing habits

MAY 2020



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 an independent, joint-industry currency that is trusted to assess the return on this investment.

Dealing with audience fragmentation has been a constant aspect of BARB's work since our formation in 1981. Fragmentation today is driven by the rise of programmes and commercials being delivered online and on-demand.

We constantly develop our measurement techniques to meet the needs of the industry with high-quality data. In recent years we have developed techniques to report viewing to BVOD services on TV sets, tablets, PCs and smartphones; pre-broadcast and non-linear viewing on TV sets and dynamically-served advertising.

The Viewing Report brings to life the latest insights from BARB. We hope you enjoy reading it.

MEET OUR CONTRIBUTORS



Rhiannon Murphy
Rhiannon Murphy is Head of AV at the7stars. She illustrates how the insights resulting from new measurement services open up further opportunities for clients, underlining the power of television as a medium.



Rachel Shaw
Rachel Shaw is Head of Content Portfolio for the BBC. She highlights the importance of drama and shows what BARB's multiple-screen viewing data reveal about audience behaviour for the BBC's top dramas.



Rhian Feather
Rhian Feather is Connections Planning Executive Business Director at OMD. She explains how the BARB and IPA TouchPoints data fusion helps to improve the impact of television planning in a complex landscape.

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HELLO,

BARB is starting its fifth decade in strange and testing times. I've [written separately](#) about the implications of the current public health crisis, and won't dwell on the implications here.

For all the short-term challenges, BARB continues to focus on three core purposes.

We began life in 1981, when the BBC and ITV came together to deliver a single measurement of what people watch, thereby demonstrating how they operated in the public interest. BARB's purpose of supporting the public service of television is as clear today as it was then. Our viewing figures are ingrained in broadcasters' ongoing conversation with Ofcom, government and the public.

Secondly, BARB supports the making of great television programmes. Our currency helps broadcasters commission more of the programmes that people want to watch, and supports how they judge the success of their programme investments.

Our third purpose is to support the trading of television advertising. Again, this is as true for BARB today as it was in 1981, while our currency also helps advertisers assess brand and sales outcomes. We make it relatively straightforward for advertisers and agencies to integrate our data with brand tracking studies, shopper panel data, or other effectiveness measures.

We deliver a trusted audience measurement currency to fulfil these purposes because of our core principles. These principles of independence, objectivity and transparency resonate with those articulated recently by the World Federation of Advertisers, for whom trusted audience measurement is a priority.

Our independent, people-based audience figures represent viewing by people from across the breadth of our society. Objective due diligence is needed to maintain our reporting standards. And comparability isn't just about metrics: fundamental to our reporting is transparency on the

editorial environment in which commercials are seen.

There has been one constant since 1981. Viewing audiences are fragmenting. It's in this context we deliver understanding of how people's behaviour is changing. This requires continuous development of a currency that is always on; we're continually changing wheels on a moving car.

Our service went through several upgrades during the last decade. As well as reporting post-broadcast audiences, we now know when people watch programmes before they've been broadcast. And it's not just about the TV set; we report multiple-screen programme ratings that cover viewing on tablets, PCs and smartphones. I could go on.

We expect more upgrades in this new decade. Two priorities are the need to report campaign performance including BVOD services and to deliver more insight on SVOD audiences. You can read more about what we already know on SVOD viewing on pages 22-25 of this report.

The good news is we've started the new decade with more progress. We now report unduplicated multiple-screen programme reach, and have integrated IPA TouchPoints audience classifications into our daily audience reporting. This year's guest essays from Rachel, Rhian and Rhiannon explore these developments from the broadcaster and the media agency perspective.

I hope you enjoy reading about these developments, and all our other measurement services, in this year's edition of The Viewing Report.



Justin Sampson
Chief Executive
BARB

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THE POWER OF KNOWLEDGE

Sadly, a shadow of doubt has been cast over television's power as a medium. In our view at the7stars, this is too often because advertisers are being wrongly advised. Whether they are experienced marketers with a history of advertising successfully on TV, or have less experience as an individual marketer or smaller organisation, brands have been reading headlines that suggest they should be sceptical and apprehensive about whether television can do a great brand-building job.

While advertisers are feeling pressure to be concerned about their television investment, their intuition is that TV is aspirational for their brand, effective for their business and provides an opportunity to put their message in front of potential customers in an environment that's entertaining, exciting and has social currency. In the AV team at the7stars, we have seen the power of television transform the businesses of many of our clients. Our recommendations are always bespoke to each client and planned with a channel-neutral view; but in TV, we are advocates for the wonderful medium we represent. It's been getting a bad rap!

But just as the ways in which people watch television are changing, so are the ways we can plan TV activity. Planning for 87%+ coverage with three opportunities to see an ad still does have its role for some clients and campaigns, but more and more we're finding ways beyond the classic spot campaign to deliver enormous value for clients. Our TV activity extends from our partnership for Deliveroo with Ant & Dec's Saturday Night Takeaway, to being the first agency to create an integrated partnership with Love Island for Ministry of Sound.

So our television planning repertoire is expanding – from campaigns to partnerships, convention to innovation, brand to performance. All these shifts heighten the

importance of understanding viewers' relationships with programmes and how they watch those programmes through the various devices available.

As audiences start shifting to platforms where we can't advertise, it's vital for us as planners to understand the relationship between programme, screen and consumer. There has been much speculation around the level of viewership that has migrated onto other devices. Now that BARB is reporting multiple-screen programme average audiences, we can see that the level of viewing on non-TV devices is very small, with 99% of viewing still happening on a TV set.

That's not to say that viewing on devices is unimportant. Now that BARB reports unduplicated programme reach across PCs and tablets and TV sets, we have more robust evidence to help us advocate for television advertising. For example, the first transmission of Love Island Winter in January 2020 delivered an additional 9% unduplicated reach from PC/tablet viewing on top of TV set viewing. This underlines the power of television and helps to reassure clients that viewing is shifting and diversifying rather than declining, and their advertising is reaching audiences in ways that were not previously measured.

Following the rollout of router meters into BARB panel homes, demographic profiles and unduplicated reach for viewing on smartphones will also be available. For clients that want to reach young adult viewers, these data will provide even more confidence.

While today we can use the multiple-screen programme average audiences and reach data in our discussions with clients about the best shows to target, the major game-changer will be the launch of the final stage of Project Dovetail: the measurement of

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TELEVISION
ADVERTISING



Left: © Saturday Night Takeaway / Deliveroo

commercials on BVOD services. Then we will finally be able to plan, measure and evaluate viewing to commercials across linear and BVOD services. This will unlock insights for all clients who use BVOD services. This is especially so for those in highly competitive categories such as Iceland which has tough competition with other supermarkets, fighting for share of viewing amongst an audience of housepersons with children that is increasingly shifting viewing from linear TV to BVOD services.

Ahead of the launch of the gold-standard solution next year, BARB is making a beta BVOD planner available. I write this before the tool is available for user testing, but we are excited about the opportunity to model reach across linear and BVOD services in our campaigns. As we get to grips with these data, they will become yet another example to clients of how we are deepening our understanding of viewers, and the value this can bring to their brands. It will be particularly helpful for entertainment clients that are very reliant on a cherry-picked approach, and have a short window of time to build reach ahead of release dates and music chart announcements. Understanding when and where audiences view genres or specific programmes will allow us to overlay linear and catch-up viewing habits to continue to drive mass reach, while also harnessing the best programme environments for each artiste.

Returning to the trend of viewing moving to platforms where our clients can't advertise, another service improvement that we will see

with the advent of BARB's router meters is the ability to find out how much of what BARB calls unidentified viewing is accounted for by viewing to SVOD services. Q4 2019 saw an average of 55 minutes of unidentified viewing each day, more than double the amount in the first quarter of 2014. As an industry, we are acutely aware of the ever-growing, ever-competitive SVOD market, and more detail on the make-up of unidentified viewing is crucial to understanding the television ecosystem in its entirety.

But what next? The market will continue to evolve, with new entrants producing more premium, captivating content. With more information than ever on viewing behaviour, we'll be able to develop our planning even further, with new insights that open up more TV-based opportunities for clients. Television will continue to provide a trusted, regulated environment offering an inherent quality stamp for brands.

At a time of change in viewers' behaviour, but without yet having a single source for campaign planning and measurement, we are as an industry improvising to gather comprehensive evidence for planning television. At the7stars, we have kept the faith with television advertising and our clients have reaped the rewards. We look forward to the completion of Project Dovetail for the comprehensive data that will – we're sure – renew confidence in client and agency minds.

The television industry may be evolving, but it's not yet giving up its prime position!

Rhiannon Murphy,
Head of AV,
the7stars



CAPTURING THE RISE AND RISE OF DRAMA

Drama has become the defining genre of the new video landscape. Drama titles dominate the list of top television shows – two thirds of 2019's top 100 shows in the UK came from this category. Each year this domination grows. And drama doesn't just make an impact in terms of audience volume; we know from speaking to viewers that it also creates deep and long-lasting memories. Drama provides emotional value, driving conversations and creating common bonds.

It's not surprising therefore that drama is as crucial for SVOD platforms as it is for linear television. Indeed, it's where the SVOD platforms are concentrating their efforts. Close to 60% of content hours on Netflix and Amazon in 2019 came from the drama category. It's where they spend both their commissioning and their marketing money.

Drama ticks a number of boxes for SVOD services. It's a great acquisition tool, driving subscription revenue and bringing people to trial the service for the first time. Drama series are also highly emblematic of a service: think of The Crown for Netflix, Transparent for Amazon or Game of Thrones for Now TV. These shows kickstarted the SVOD revolution. Returnable series amplify value; length of series drives habit. The modern-day linear scheduler must compete against both the present, and the past.

The BBC is leading the way in premium drama, with Line of Duty topping the top 10 broadcast television dramas in 2019. We, like all channels, continue to look for ways to amplify the impact of our dramas, such as through different forms of scheduling. Line of Duty moved from BBC2 to BBC1 to create greater exposure for younger audiences. When we brought back Luther in 2019, we stripped it across the week, creating a welcome appointment-to-view in the first week back at work in the new year. The



Above: Killing Eve © BBC

continued success of Silent Witness, now in its 22nd year, is in part testament to the power of the double-night scheduling. The purpose of all these scheduling strategies is of course to maximise scale and reach. But it's also more than that. We optimise through linear and on-demand to make it as easy as we can for viewers to complete a series. Viewers who watch a full series are more likely to recall and value it. It becomes a complete and memorable experience.

What can BARB tell us about audience behaviour? If you look at the profile of viewing to drama on BBC1 (Jan-Sept 2019), 6.9% of live viewing was by 16-34-year-olds, rising to 12.4% of VOSDAL viewing. The further away you get from the TX slot, the more 16-34s contribute to viewing: 13.8% for 1-7 days, 16% for 8-14 days and 17.1% for 15-28 days. When you add in device viewing,

DRAMA HAS
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OF THE NEW VIDEO
LANDSCAPE

you multiply the profile of 16-34s to BBC1 content to 25.4%. By opening up availability through a combination of live, timeshifted and on-demand opportunities, we ensure that audiences can enjoy programmes on their own terms. The same content delivered or consumed in different ways attracts a different audience.

We can also examine patterns longitudinally over the last five years. In 2015, consolidation would add around a third of viewing to the overnight figure for a typical BBC1 drama; by 2019, that figure was closer to 60%, plus there's an additional 8% of viewing taking place on devices. For the BBC, overnights are an indicator of performance rather than a true measure of audience value. It is only day one.

Some dramas have a significantly different audience when looking at device viewing. Peaky Blinders was the most-watched BBC1 drama series ranked by additional audience on devices on average in 2019. This is a known title where viewers feel the need to get up to speed before the next TX. Whereas The Capture, a brand-new drama, drew strength by word of mouth – with more viewing in the 8-28 day window than in the first seven days.

More and more, the way we value content is becoming more nuanced. We look to the continued value of content over time, on all platforms.

Killing Eve: optimising audiences across platforms

Killing Eve is a great crime drama series that really lent itself to experimentation in scheduling. We knew that audiences reacted to it in a very emotive way. They described it as thrilling and gripping – both great virtues of crime drama. But they also felt it was weird, quirky and shocking. Knowing that

audiences spoke about it in such passionate terms meant that it was going to drive word of mouth viewing. We felt confident in making all episodes available on day one, allowing the audience to consume it at their own pace. And most importantly, it was a crime drama that did not hinge on who did it. The title itself was a great big spoiler! The entire series was about the process of Killing Eve.

By making the full series available on iPlayer and using the BBC1 transmission as grade A marketing, we were able to maximise viewing. That meant we got some spectacular viewing figures. Ahead of episode eight airing on BBC1, roughly 50% of viewing had already taken place. In other words, before it had even been transmitted, we banked an audience of four million. In fact, more viewers watched the finale before it was broadcast, than watched live and in the seven days following. But it's this unique combination of linear and on-demand that really drove viewing.

For younger audiences (16-34s), the figures were even more compelling. Younger audiences are far more likely to consume a series ahead of TX, or post TX. They are both fashionably late, and unfashionably early. And once they get into a series, they are voracious. By episode eight, over 80% of the younger audience's viewing had already taken place. Of course, I'm comparing viewing here to seven days after TX, or even 28 days. With our own iPlayer data, we can see continued viewing six months later, a year later and even longer. We saw the consumption of series two prompting revisits and fresh visits to series one. The content continues to give value.

For the BBC, by helping audiences find and complete a series, we create greater value. We continue to experiment in ways to help viewers find and enjoy the content they love.

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Rachel Shaw,
Head of Content
Portfolio, BBC



LINKING STRATEGIC AND IMPLEMENTATIONAL PLANNING

The pace of change in media has never been faster; nor has it ever been more exciting, challenging and at times overwhelming for planners. This change has made media planning more complex, with the number of tools, systems and data sources available to help build multimedia ecosystems constantly increasing. It can be difficult to understand where all of these new tools fit into the process and what the relevance of their output is.

Consumer insight has always been key, and never before have audiences been able to be defined as precisely as they can be now, with huge datasets owned by advertisers and powerful ways to combine these with third-party data. These data-led audiences help identify sources of demand to determine advertising strategy and drive business growth. But business impacts are only fully achievable if we can apply these bespoke audience definitions to every step of campaign planning and implementation. This becomes a challenge of planning in one data source but buying in another.

One of the key tools that we use for strategic planning is IPA TouchPoints. This enables us to build bespoke audiences and understand their moods and media behaviours across the day. These insights can help to drive incremental reach, frequency or word-of-mouth, and as we move to a “cookie-less” world, TouchPoints becomes an even more valuable tool. There has been, however, a limit to the practical application of TouchPoints media consumption information for television, since it is designed for strategic rather than implementational planning. We can use it to determine which television channels we should consider, but not the programming or formats that will work most effectively.

Television plays an important role in many media plans as it is one of the highest

returning channels across categories, according to Thinkbox’s Demand Generator. But we are always looking to make our television plans more effective. One of television’s strengths is in generating broad reach and BARB does an incredible job of delivering spot-by-spot measurement and insight across multiple audiences. That power increased when TGI was fused into BARB to deliver more category-specific audiences. We have been using this fusion for years and it has improved our television planning and activation.

Nothing excites me more than the opportunity to see a new data set in a traditional channel. So, the new fusion of TouchPoints into BARB, which launched in March, offers a number of interesting new ways to help us to improve the impact of our television planning:

1 Trade more effectively
We rarely want to reach a generic demographic audience; it’s usually a means to an end.

BARB’s fusion with TouchPoints provides an additional data source to not only understand a previously unknown attitudinal audience, such as vegetarian gamers, and how they watch television, but also to look at which trading audience converts best for this audience. The fused data for March 2020 show that vegetarian gamers’ viewing of commercial channels is closer to that of ABC1 adults than 16-34s or housepersons with children. This opens the potential to be more creative and rigorous in our trading decisions, to best reach our clients’ audiences.

2 Get a better understanding of how we can reach the elusive SVOD viewer

There is no topic bigger in the AV world than unidentified viewing, which has increased by almost 9% since 2018, driven by viewers’ appetite for SVOD services. And

it has only got bigger in 2020 following the launch of Apple TV+ and Disney+. These developments make it more difficult to reach these viewers on television, but it is important that we try, as we know how effective television advertising is. Using the integrated BARB and TouchPoints data, we can isolate the television viewing behaviours of heavy SVOD viewers, and generate a top programmes / channels list for reaching them with television advertising. The March 2020 fused data show that heavy SVOD viewers are light linear television viewers, but US reality, comedy and drama series still perform strongly on linear TV for them. We can therefore work with our broadcast partners to create schedules that maximise our chances of reaching them.

3 Integrate mood into television plans
TouchPoints allows us to understand people’s moods across the day and week. This is a metric that can be planned into cross-media strategies to align with specific creative opportunities or brand insight. Having the capability to understand which programme genres are associated with the moods of bespoke audiences can help us to align our advertisers’ messages with the most appropriate content.

4 Create television plans that make other media channels work more effectively

Within the Connections Planning team at OMD UK, we pride ourselves on understanding the interplay between channels and the role of each in driving reach. However, as the lines are blurred between on and offline and newer media channels are added, this becomes more difficult. The BARB and TouchPoints fusion enables our television plans to be integrated with newer media channels, as TouchPoints carries information on all media usage.

Being able to understand when audiences are consuming newer channels, such as influencers and gaming, and then in turn understand when and through which device they are also consuming television, helps us to allocate budget and activity more effectively. So, for example, the fused dataset for March 2020 shows the importance of films and entertainment to followers of influential vloggers (44% of their commercial television viewing is to these genres, compared with 40% among all adults). This becomes a media planning principle that can be leveraged across all media channels, not just television.

5 Plan television across devices
BARB’s Project Dovetail for programmes is the best view of how content is consumed across devices. We can take this gold-standard view and look at a level beyond pure demographics, including more behavioural data and the differences in device viewing across the day and week.

6 Improved audience understanding for broadcasters
We are lucky at OMD UK to work with advertisers who are themselves broadcasters. This data integration is a great opportunity for these advertisers to hone in on more specific audiences for channel growth, not only to influence advertising decisions but also to adjust schedules and pilot new programmes.

The media industry is constantly evolving, and as a planner it is great that television is continuing to innovate. This latest BARB and TouchPoints data fusion is a fantastic adaptation and one that will really help with planning television in a complex landscape.

THE FUSION OF TOUCHPOINTS AND BARB ENABLES OUR TELEVISION PLANS TO BE INTEGRATED WITH NEWER MEDIA CHANNELS, WHICH HELPS US TO ALLOCATE BUDGET AND ACTIVITY MORE EFFECTIVELY

BARB’S FUSION WITH TOUCHPOINTS OPENS THE POTENTIAL TO BE MORE CREATIVE IN OUR TRADING TO BEST REACH OUR CLIENTS’ AUDIENCES

Rhian Feather,
Connections
Planning Executive
Business Director,
OMD UK

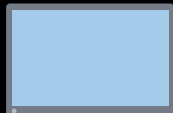


PROJECT DOVETAIL UPDATE

People are increasingly watching television programmes on devices other than the TV set; the UK television and advertising industry needs a trusted, independent source of these multiple-screen viewing figures. BARB established Project Dovetail to meet this need.

The table summarises the three stages of Project Dovetail that have been delivered:

- Census-level device data
- Multiple-screen programme ratings
- Unduplicated reach and time spent viewing

PROJECT DOVETAIL STAGE	DEVICE			
	TV	PC	Tablet	Smartphone
				
Collecting device data for programme viewing				
1 Census-level device data	n/a (panel data for TV set viewing)	BVOD services report (launched in 2015) – includes viewing time via all BARB-reported BVOD services on PCs, tablets and smartphones.		
Fusing panel and device data for programme viewing				
2 Multiple-screen programme ratings	Four-screen viewing dashboard (launched in August 2018) – multiple-screen programme audience figures for all individuals across TV sets, PCs, tablets and smartphones.			
	Demographic analysis of viewing on TV sets, PCs and tablets via BARB-registered data-processing bureaux (launched in August 2018).			Demographic analysis of viewing on smartphones to be included once router meter data are available in 2021*
3 Unduplicated programme reach & time spent viewing	Unduplicated programme reach & time spent viewing available across TV sets, PCs and tablets (launched January 2020).			Unduplicated programme reach & time spent viewing on smartphones to be included once router meter data are available in 2021*
	More extensive analysis, e.g. programme reach analyses for PCs/tablets and incremental programme reach analyses for these devices over TV sets, can be conducted via BARB-registered data-processing bureaux.			
* Router meters will enable us to track panel members' viewing on smartphones; deploying these meters in all panel homes means we will be able to track the demography of viewing on smartphones and unduplicated programme reach and time spent viewing on these devices. Kantar is installing router meters into the BARB panel. Initial data will be available from 2021.				
We include programme average audience figures for smartphones alongside other screens for all individuals by assuming that each smartphone viewing session is viewed by an individual of unknown demography, i.e. one viewer-per-view.				

WHAT'S NEXT?

The fourth and final stage of Project Dovetail, BVOD campaign performance, is in development. In the interim, we are launching a beta BVOD planner, to help agencies

and advertisers plan advertising campaigns across BARB-reported broadcasters' linear channels and BVOD platforms. Contact jim.jarrett@barb.co.uk for details.

TOTAL TELEVISION VIEWING

BARB introduced a new definition of total television viewing together with the launch of unduplicated programme reach and time spent viewing data in January 2020. The new definition is called total three-screen viewing. Once router meter data are available, smartphones will be included in the definition, which

will then be known as total four-screen viewing.

The previous definition of television viewing is now known as C7 TV set viewing. This table outlines the differences between what's currently included in the two definitions:

		TOTAL THREE-SCREEN VIEWING	C7 TV SET VIEWING
			
Devices	TV sets	Yes	Yes
	PCs	Yes – part of Project Dovetail	No
	Tablets	Yes – part of Project Dovetail	No
	Smartphones	No ¹	No
Programmes	Live linear viewing	Yes	Yes
	Timeshifted viewing through a PVR	Yes – up to 28 days post-broadcast	Yes – up to 7 days post-broadcast
	Timeshifted viewing through a BVOD service	Yes – up to 28 days post-broadcast ²	Yes – up to 7 days post-broadcast
	Pre-broadcast viewing through a BVOD service	Yes – if the broadcaster has supplied the asset	No
	On-demand only / non-linear viewing through a BVOD service	Yes – if the broadcaster has supplied the asset	No
Commercials	Live	Yes	Yes
	Timeshifted viewing through a PVR	Yes – up to 28 days post-broadcast ³	Yes – up to 7 days post-broadcast
	Timeshifted viewing through a BVOD service	No – in development	No
Universe ⁴	Private homes with a TV set	Yes	Yes
	Private homes with a broadband connection but no TV set	Yes	No
Reporting method		As viewed – viewing is counted as having taken place at the time of viewing	As broadcast – viewing is counted as having taken place at the time of broadcast
¹ Router meters will enable us to track panel members' viewing on smartphones. Once router meter data are available in 2021, smartphones will be included in the definition as part of Project Dovetail, and the new definition will then be known as total four-screen viewing.			
² 28-day limit only applies to TV sets; no time limit on PCs or tablets.			
³ The trading currency remains live and timeshifted viewing of commercials within seven days of broadcast.			
⁴ BARB's universes do not include: student halls of residence, military bases, pubs/bars, offices and prisons.			

PRE-BROADCAST VIEWING

Television informs popular culture in many ways and over the years has spawned new language to describe changing behaviour - from water-cooler moments to box-set bingeing. It may now be time for a phrase that captures people's viewing of episodes ahead of the broadcast schedule.

Several broadcasters have been experimenting with making a whole series available on-demand after the first broadcast episode. This extends on-demand viewing from playing catch-up to getting ahead - making workplaces risky territory for plot-spoilers when the tea-break chat turns to television.

BARB's ability to provide data about pre-broadcast viewing depends on the co-operation of the broadcasters; they supply audio assets to BARB so that the content can be recognised by the measurement system even before its linear broadcast. This is particularly important for assets that might never have a linear broadcast or have a linear broadcast much later - such as content on BBC Three. As BARB's library of audio assets continues to grow (now over 7,000, which has doubled in a year), we will be able to build a richer base of insight about this type of viewing.

The first example is Sky One's Manifest, where the entire series was made available on-demand after the first episode's airing. Pre-broadcast viewing climbed across the lifetime of the series to peak at over 92% of viewing to the final, sixteenth episode. Almost a quarter of a million people really went for it - BARB data show 241,000 viewers watched episode 16 (and presumably episodes 2-15 as well) within the week after the series debut and before the linear broadcast of episode two.

With live viewing to any episode of Manifest never achieving more than the 10% of

audience achieved in episode one, there's finally some encouragement here for those commentators who long ago predicted the death of the television schedule. Only one live broadcast (episode 14) of the last ten episodes in the series achieved more than 5% of its viewing live via the TV set. And while almost two thirds of the audience to the first episode used Sky On Demand to catch up post-broadcast, over two-thirds of the audience to the second episode used it to watch pre-broadcast, a proportion that climbed thereafter. Given the option to view ahead, viewers go for it.

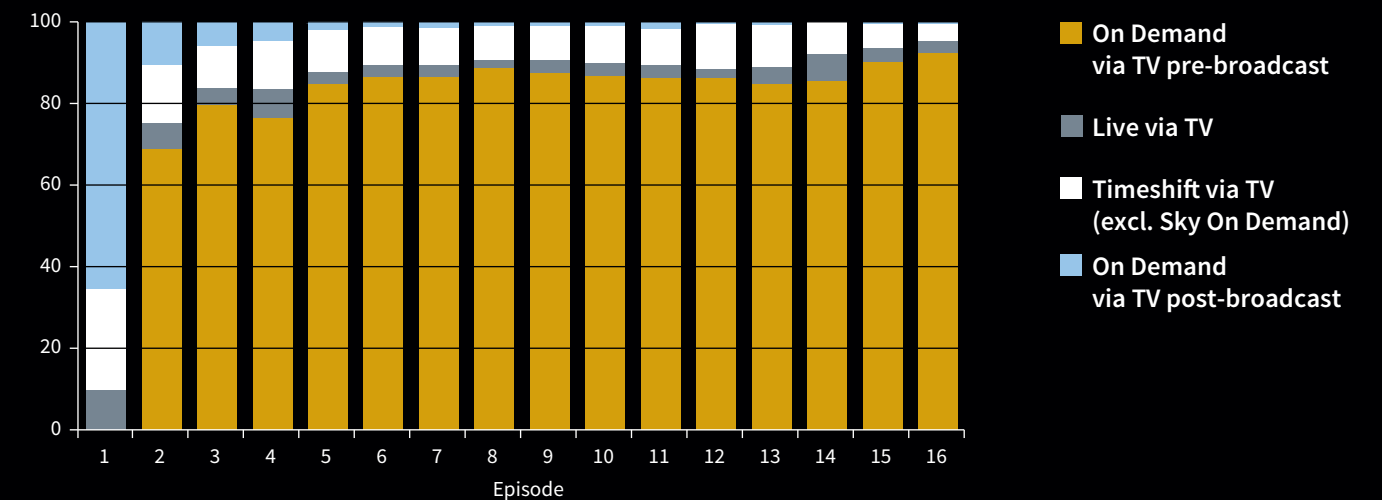
Our second example takes a look at episode six of BBC One's Gold Digger. It's not quite as revolutionary as Manifest - 30% of viewing was live and just about all of that was on the TV set - but pre-broadcast again took the lion's share of viewing at 44%, and this was where devices played their biggest role, taking almost a quarter of the pre-broadcast total across PCs (12%), tablets (8%) and phones (3%). The remaining 26% of the audience viewed post-broadcast, again largely (94.5%) on the TV set. Perhaps these more traditional BBC One viewers were less inclined to view ahead of the schedule.

So, as people are presented with a mix of technologies for timeshifting their television viewing, some are keener than others to adopt new behaviours. BARB is getting ever better equipped to provide the evidence and insight that helps broadcasters cater for all kinds of viewing preferences.

PRE-BROADCAST VIEWING CLIMBED ACROSS THE LIFETIME OF MANIFEST TO PEAK AT OVER 92% OF VIEWING TO THE FINAL EPISODE

MANIFEST (Sky 1)

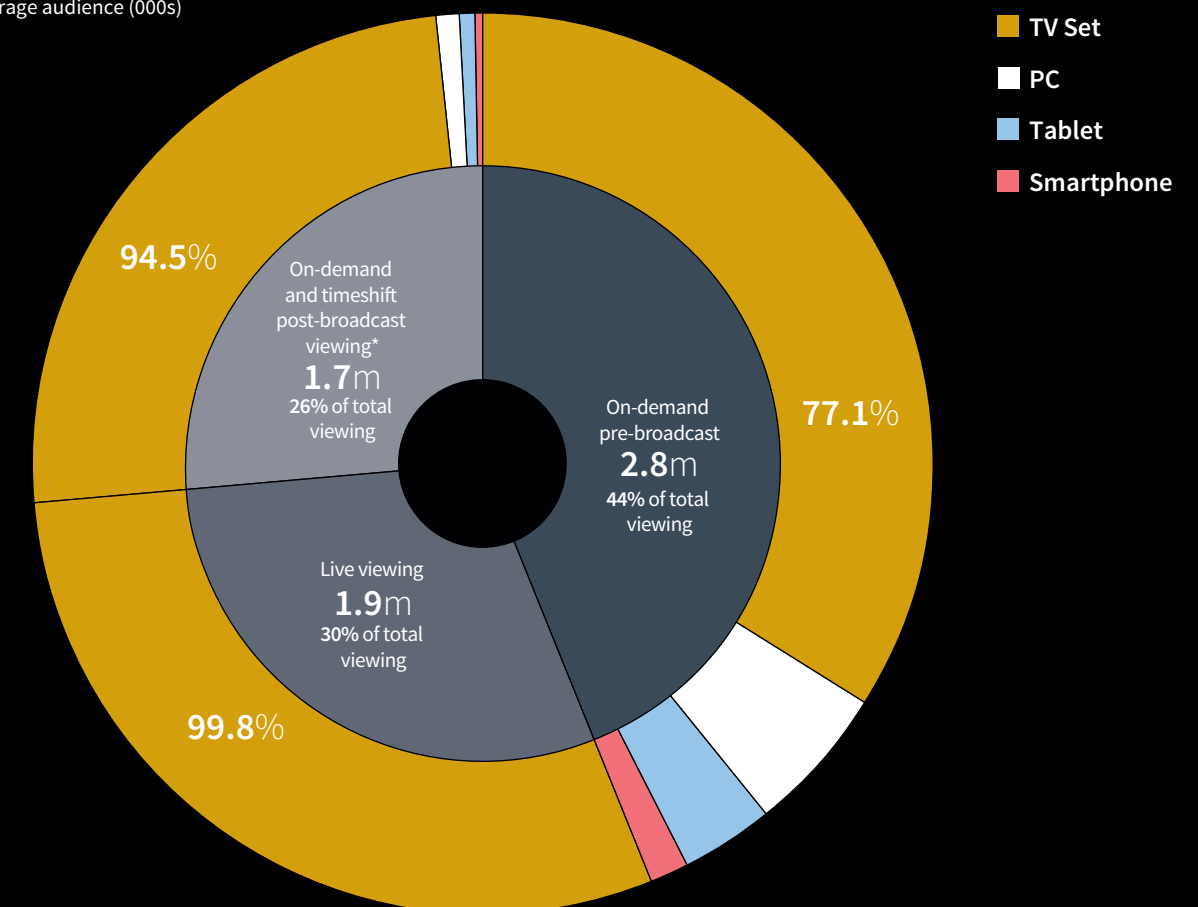
Percentage of total TV audience



Source: BARB 30/07/19 - 05/11/19. Timeshift / On Demand are 28-day consolidated figures

GOLD DIGGER Episode 6 (BBC 1)

Average audience (000s)



Source: BARB, All individuals 4+, average audience

* Includes VOSDAL, on-demand viewing on same day as linear broadcast, and all subsequent viewing within 28 days

DEVICES IN THE TV ECOSYSTEM

Ten years since the release of Apple's first-ever iPad in 2010, tablets are now commonplace devices. But taking under 1% of viewing minutes across 2019, it's clear that tablets have enhanced rather than disrupted TV set viewing. So, it's fascinating to delve into BARB data to investigate how people are using their various devices.

The first chart gives a 12-month picture of the billions of minutes viewed in 2019 on non-TV devices. It's clear that it's television's standout events that drive the peaks in viewing on devices, and the dips coincide with school and bank holidays, in line with what we see for TV set viewing. It seems that it's during typical working weeks that people use devices the most to catch up or get ahead of their viewing.

Looking underneath the peaks and troughs, tablets are the population's first-choice device in every week of the year: ranging from 38% to 51% of the volume of non-TV set viewing.

The popularity of Love Island amongst young adults drives the year's biggest device viewing peak. And Love Island's young audience, preferring smartphones and PCs to tablets, drive a different shape to the pattern of device use precisely during the show's weeks on air.

Viewing on devices was also high during September to December, driven by the Rugby World Cup and I'm a Celebrity. PC viewing in particular was high during the Rugby World Cup, perhaps unsurprising given that quite a few games were live during weekday business hours. In the final week of the year, The Gavin and Stacey Christmas Special deserves a special mention – leading to a festive peak in viewing on devices.

The second chart looks at device viewing across the day and overlays the familiar

shape of TV set viewing. Device viewing has come to reflect the settled daypart pattern that viewers are comfortable with for their TV set viewing, and builds to the same 2100 peak. (Note the difference in the scales here, though – with TV set viewing minutes almost 80 times the volume of minutes on devices.)

One key difference, however, is the steep increase in TV set viewing from 4pm onwards, outpacing the slower build in device viewing; perhaps a reminder of how the general population are watching at home rather than how commuters are viewing on smartphones and tablets in London and other cities. TV set viewing is disproportionately strong in the clock-hours from 1600 to 2000 – taking an average of 98.9% of all viewing minutes across that time.

Focusing on devices, tablets take the lion's share in every clock-hour, peaking at breakfast time and again after school, throughout the evening and then after the evening peak as people's first-choice non-TV device for late-night viewing.

PCs and smartphones jostle for second-place device throughout the day – smartphones are more popular before work, but PCs then edge ahead during the working day and are chosen ahead of smartphones for bigger-screen viewing across the evening from 1700 to 2300. It's tablets and smartphones that dominate non-TV set viewing in the wee small hours.

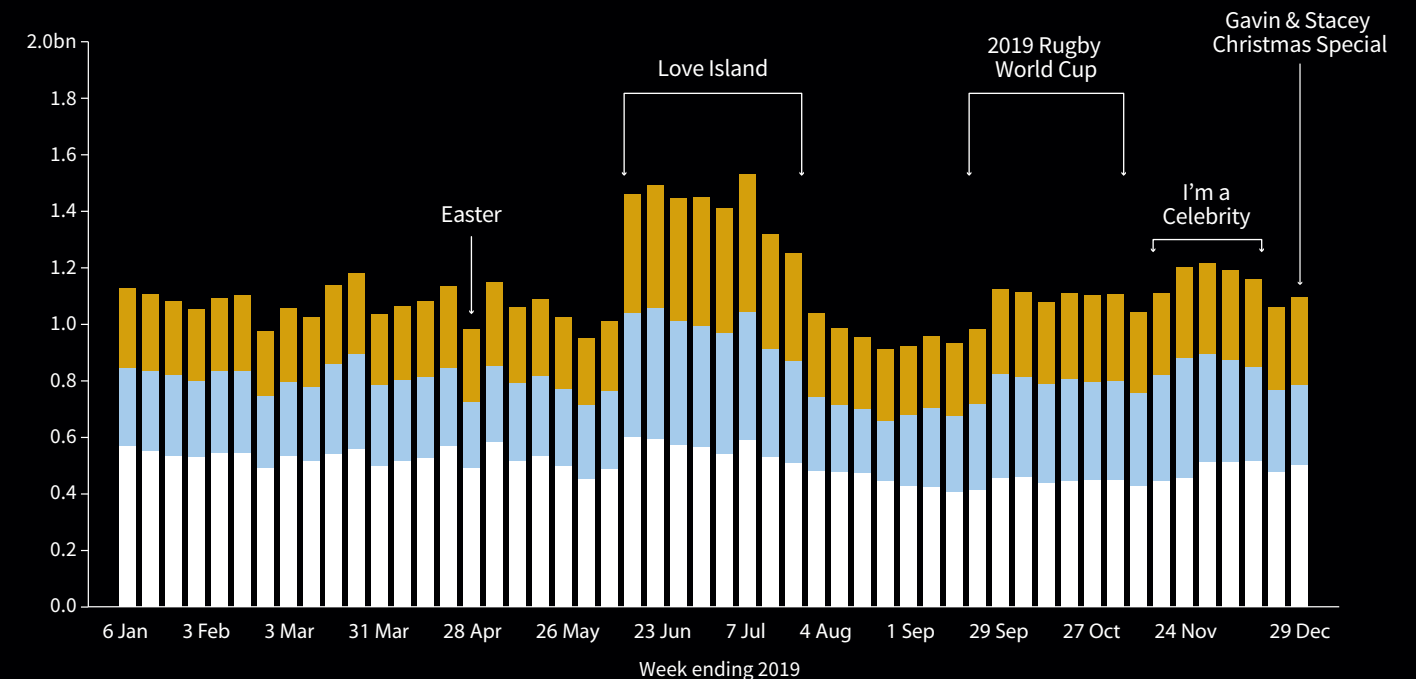
A decade on from the iPad's launch, we're now seeing a settled pattern in device usage for viewing: tablets as first-choice for most; and a familiar shape to viewing across the day.

A DECADE ON FROM THE IPAD'S LAUNCH, TABLETS ARE THE PREFERRED DEVICE WHEN PEOPLE CAN'T WATCH ON A TV SET

VOLUME OF VIEWING ON NON-TV SET DEVICES

■ Tablet ■ PC ■ Smartphone

Billion minutes per week



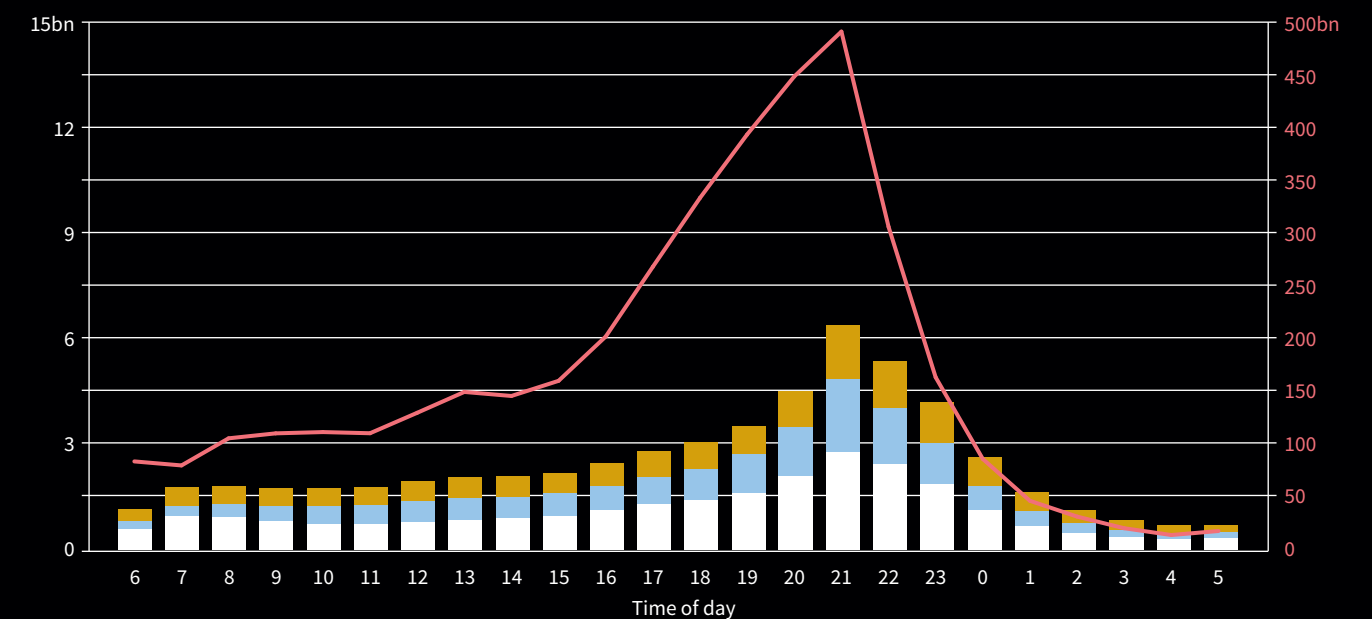
Source: BARB PC, tablet and smartphone census data, 2019

TELEVISION VIEWING BY TIME OF DAY BY DEVICE

■ Tablet ■ PC ■ Smartphone — TV set

Non-TV set viewing minutes (billions)

TV set viewing minutes (billions)



Note: TV set viewing is plotted on a separate, larger-scale axis compared to device (smartphone, PC, tablet) viewing. Volumes of viewing minutes to TV set are significantly higher at all times of day. Data are for identified viewing to BARB-reported channels on TV sets / tagged BVOD services on devices. Device data are census data

Source: BARB, 2019

MOST-WATCHED ON DEVICES

It no longer seems remarkable to watch television on a computer, tablet or phone. Whether it's to see something live, catch up on a show we missed or get ahead on a series we're hooked on, our devices seem like an everyday way to watch television when and where we like, even though the TV set remains the go-to device when possible.

By fusing census-level device data with panel data, BARB has been providing multiple-screen programme viewing figures since September 2018. We can now see these data across a whole year, giving an overview of the programmes that gained most device viewers in 2019.

Looking at the top table, we can see the programmes that achieved the highest absolute audiences on devices. It's a table dominated by the shows that earned must-see status (and achieved the highest television ratings) in 2019 – whether dramas (such as Killing Eve, Line of Duty, Peaky Blinders, Game of Thrones), entertainment (Love Island, The Apprentice, I'm a Celebrity) or sport (the Rugby World Cup semi-final between England and New Zealand). It was must-see premieres or series finales that almost always drove the highest device viewing to dramas; whether those series ran across several weeks or (in the case of Luther and The Victim) consecutive days.

Viewing on devices was also a reflection of the public's determination to catch a couple of legendary comedy comebacks: the Christmas Day edition of Gavin and Stacey – the UK's most-watched television comedy for 17 years; and the first-episode return of Steve Coogan's Alan Partridge.

Topping the table is Love Island, an early episode in its highest-rated fifth series. (For this table, we've taken out duplicates of the same programme. Without that adjustment,

Love Island would have claimed the 48 biggest audiences on devices in 2019, almost its entire broadcast run.) This particular episode achieved an average audience of over 1.5m on devices, or 27% of its total audience. Knowing its young audience appeal, it's perhaps not a surprise to see that Love Island achieved by far the biggest smartphone audience in this top-ranked table, with smartphone viewing comprising 11% of that episode's total four-screen audience or 41% of the non-TV device viewing. Other Love Island episodes drove the highest absolute levels of PC and tablet viewing. Clearly Love Island was – for its audience – something you just could not miss.

Jesy Nelson: Odd One Out was the highest-ranked documentary viewed on devices in 2019 – almost certainly related to its young appeal, but probably also that the documentary launched and earned a reputation on BBC Three and was later aired on BBC One (which is the broadcast that's picked up in this table).

The second table highlights the programmes where device viewing drove the biggest percentage uplift in viewing. Often off a smaller TV set base, the table is dominated by children's and young adult programming, with a sprinkling of sports across golf, football and cricket.

Love Island features again, with its sheer volumes of device viewing driving the biggest percentage uplifts on TV set viewing; and while some of the uplifts in this table are driven off smaller TV set audience sizes, that's not the case for lots of the young adult programmes here, which are achieving substantial audiences on all four screens.

WE CAN NOW SEE
MULTIPLE-SCREEN
PROGRAMME
VIEWING FIGURES
ACROSS A WHOLE
YEAR, GIVING AN
OVERVIEW OF THE
PROGRAMMES
THAT GAINED
MOST DEVICE
VIEWERS IN 2019

TOP PROGRAMMES ON DEVICES, RANKED BY NON-TV SET AUDIENCE

	Programme	Average audience – individuals (000s)					4-screen total
		PC	Tablet	Smartphone	Non-TV total	TV	
1	Love Island (ITV2, 14/06/2019)	582.8	308.9	611.0	1,502.6	3,993.7	5,496.3
2	Gavin and Stacey (BBC 1, 25/12/19)	411.7	233.3	203.1	848.2	17,072.5	17,920.7
3	Love Island: The Reunion (ITV2, 04/08/19)	212.0	145.8	268.7	626.5	3,296.9	3,923.4
4	I'm a Celebrity... Get Me Out of Here! (ITV, 17/11/19)	280.8	137.9	166.2	584.8	12,591.1	13,175.9
5	Line of Duty (BBC 1, 05/05/19)	283.9	185.7	86.0	555.5	12,137.5	12,693.0
6	Peaky Blinders (BBC 1, 25/08/19)	274.4	130.5	147.3	552.1	5,693.8	6,245.9
7	Jesy Nelson: Odd One Out (BBC 1, 12/09/19)	207.0	125.0	183.1	515.1	3,258.0	3,773.1
8	Killing Eve (BBC 1, 08/06/19)	265.6	133.9	91.5	491.0	6,624.1	7,115.1
9	Fleabag (BBC 1, 08/04/19)	208.3	136.5	95.9	440.7	2,491.6	2,932.3
10	EastEnders (BBC 1, 08/01/19)	147.0	122.7	150.3	420.0	5,196.3	5,616.3
11	The Apprentice (BBC 1, 02/10/19)	204.1	121.7	93.2	419.0	6,348.8	6,767.8
12	This Time with Alan Partridge (BBC 1, 25/02/19)	200.5	117.6	89.1	407.3	4,861.9	5,269.2
13	Leaving Neverland: Michael Jackson & Me (C4, 06/03/19)	242.7	91.1	62.5	396.2	4,671.5	5,067.7
14	The Capture (BBC 1, 01/10/19)	187.6	120.4	56.4	364.4	5,683.3	6,047.7
15	Silent Witness (BBC 1, 08/01/19)	186.8	122.0	54.2	363.0	7,270.6	7,633.6
16	Game of Thrones (Sky Atlantic, 28/04/19)	162.5	121.2	72.5	356.2	4,627.7	4,983.9
17	Luther (BBC 1, 04/01/19)	146.6	125.0	76.9	348.4	7,240.0	7,588.4
18	Rugby World Cup 2019: ENG v NZ (ITV, 26/10/19)	153.6	69.9	109.6	333.2	7,591.8	7,925.0
19	The Victim (BBC 1, 08/04/19)	142.0	124.9	46.2	313.1	6,198.7	6,511.8
20	Love Island: Unseen Bits (ITV2, 15/06/19)	110.2	78.2	117.9	306.3	1,478.2	1,784.5

TOP PROGRAMMES ON DEVICES, RANKED BY PERCENTAGE UPLIFT ON TV SET

	Programme	Average audience – individuals (000s)					% uplift
		PC	Tablet	Smartphone	Non-TV total	TV	
1	The Dumping Ground (CBBC, 04/01/19)	12.4	38.0	37.5	87.9	191.0	46.0%
2	The Next Step (CBBC, 13/12/19)	10.8	23.9	16.1	50.8	123.3	41.2%
3	Love Island (ITV2, 14/06/19)	582.8	308.9	611.0	1502.6	3993.7	37.6%
4	4 O'Clock Club (CBBC, 06/02/19)	6.9	16.5	15.1	38.5	103.3	37.3%
5	Love Island: Australia (ITVBe, 05/11/19)	13.8	11.9	11.1	36.8	112.5	32.7%
6	Golf: Masters - Live (Sky Sports Main Event, 11/04/19)	9.2	19.8	7.3	36.2	115.6	31.3%
7	Live Renault Super Sunday (Sky Sports Premier League, 11/08/19)	24.4	35.8	29.2	89.4	288.5	31.0%
8	The End of the ****ing World (C4, 05/11/19)	97.2	30.9	53.8	181.9	625.7	29.1%
9	Made in Chelsea (E4, 09/12/19)	55.8	34.0	28.3	118.0	407.9	28.9%
10	The Only Way is Essex (ITVBe, 24/03/19)	65.8	65.3	73.3	204.4	733.9	27.9%
11	The Worst Witch (CBBC, 07/01/19)	10.2	24.9	14.6	49.7	183.4	27.1%
12	Live EFL SF: Portsmouth v Sunderland (Sky Sports Football, 16/05/19)	7.6	20.2	8.8	36.6	135.5	27.0%
13	Sam & Billie Faiers: The Mummy Diaries (ITVBe, 27/03/19)	41.1	48.7	39.0	128.8	482.9	26.7%
14	Shipwrecked (E4, 05/02/19)	38.6	26.9	40.5	106.0	400.2	26.5%
15	Almost Never (CBBC, 29/10/19)	6.2	15.8	8.6	30.6	116.3	26.3%
16	Live ICC World Cup SF: AUS v ENG (Sky Sports Main Event, 11/07/19)	22.5	31.1	37.2	90.8	348.2	26.1%
17	Live PL: Fulham v Man Utd (Sky Sports Premier League, 09/02/19)	16.3	22.9	18.2	57.6	227.6	25.3%
18	Love Island USA (ITVBe, 21/09/19)	7.7	9.9	9.1	26.7	107.5	24.8%
19	Live EFL SF: Derby v Leeds (Sky Sports Football, 11/05/19)	15.4	25.6	15.4	56.5	227.7	24.8%
20	The Missing (BBC 4, 20/03/19)	10.9	10.8	3.8	25.5	102.8	24.8%

Source: BARB 2019. Note: Data are for programmes with a minimum duration of 15 minutes and TV set audience of 100k+. Only the top programme per programme title is included. TV set data include SD, HD and +1 where relevant.

DEMOGRAPHY ON THREE SCREENS

When BARB viewing figures are reported in the media, they're usually the total audience for the biggest Christmas Day shows or a major sporting event. But for BARB's customers, it's crucial to know not just how many people are watching, but who they are. As viewing behaviour changes and new platforms become more important, our industry wants answers to that question for viewing on all platforms and devices – but often the data available are for devices, not people.

That's where representative panels come in, and it's how BARB has been able to report programme average audiences across four screens for all individuals aged 4+ since September 2018. We do this by combining device-based census data from BVOD services (showing the number of PCs, tablets and smartphones used to watch programmes) with our panel data, which show the number of people watching and who they are.

For viewing on TV sets, PCs and tablets, wider demographic profiles are also available. And once the roll-out of router meters to panel homes is completed, demographic profiling will be available for smartphone viewing too.

The current multiple-screen viewing data allow us to discover examples of programmes where viewer profiles really differ across devices.

The first example is Cold Call, a four-episode original drama broadcast on Channel 5 in November 2019. Its TV set audience had the kind of age profile we might expect for a linear television drama, with just under half the audience over 65 and less than 13% under 45. Device viewing typically drives a younger audience profile but did so strongly in the case of this series – with 25% of viewing on tablets, and over 45% on PCs, accounted for by under-45s.

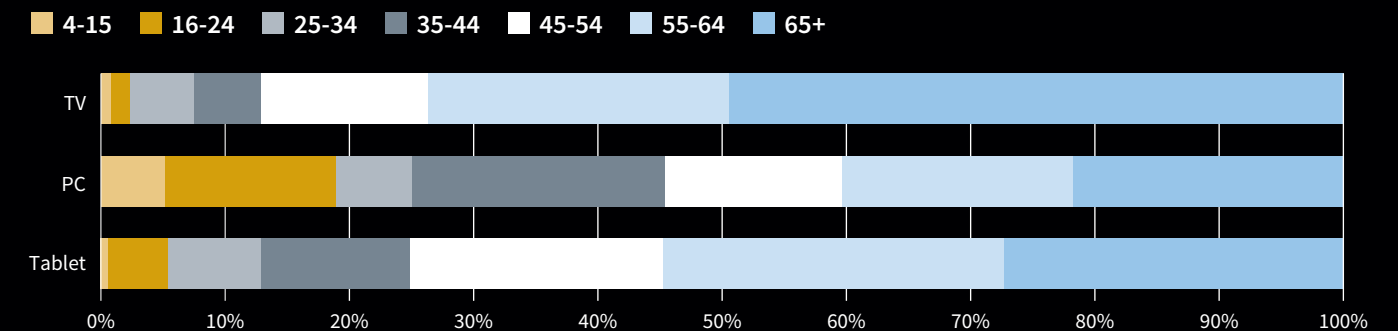
In the second example, we see again the impact of device viewing in enabling younger audiences to access a programme, even when in this case (Love Island) the baseline age profile in linear television is already skewed very young (60% under 35). Device viewing takes that young audience skew even further, with the under-35s accounting for 67% of this episode of Love Island's viewing on tablets and 81% of viewing on PCs. We'll be able to see the demographics of smartphone viewing to this show when the enhanced data become available.

In 2019's Viewing Report, we saw that UKTV's Taskmaster's male bias on linear television was contrasted by a female bias in viewing on devices.

This year, it's Fleabag that challenges gender expectations. In the third chart, we see the gender split of Fleabag across TV set, PC and tablet, contrasting each time with the average for BBC One on those devices. The gender mix of Fleabag viewers on the TV set was 50/50 male/female, showing a slight female bias relative to the BBC One average. Typically, BBC One viewing on PCs and tablets show a strong female bias, with women making up around two thirds of the audience. But Fleabag broke that rule, with men accounting for a remarkable 51% of the tablet audience, and 46% of the PC audience. Volumes of viewing to Fleabag on devices remained high for women, so the difference in gender mix was about growth in male viewing, not fewer female viewers.

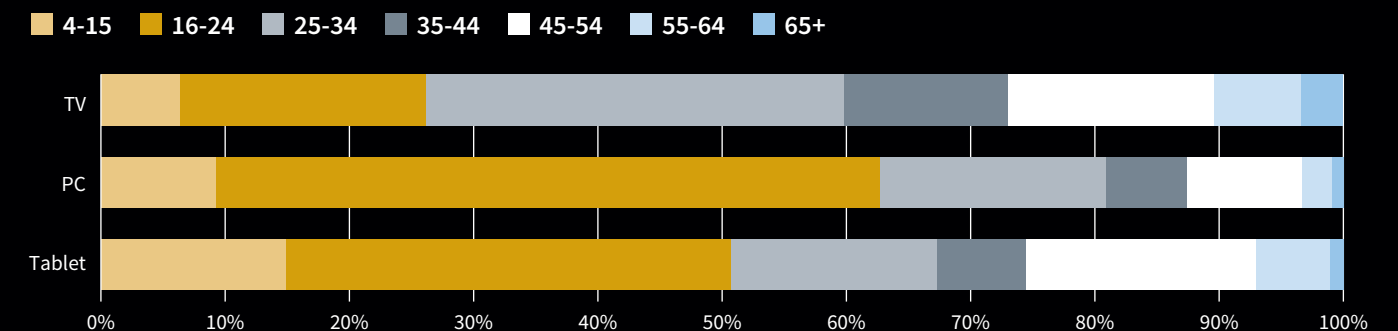
IT'S CRUCIAL TO
KNOW WHO IS
VIEWING – ACROSS
ALL PLATFORMS
AND DEVICES

COLD CALL (CHANNEL 5, 18-21/11/19), AGE PROFILE BY DEVICE



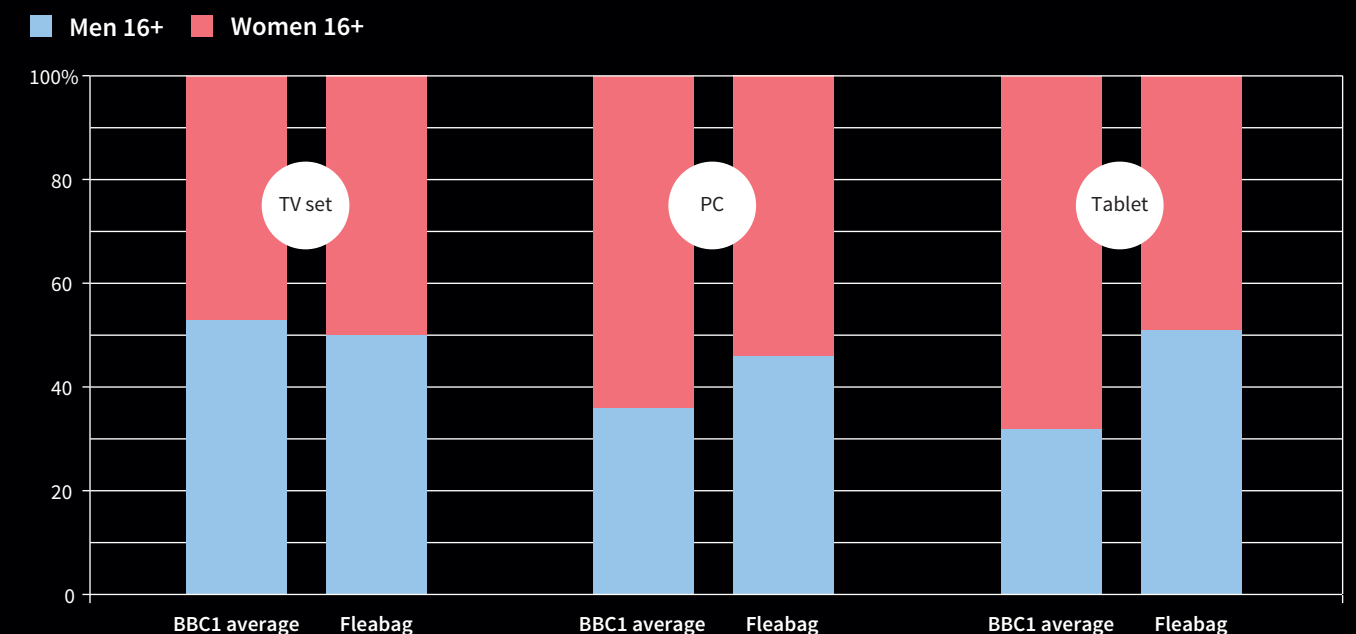
Source: BARB, profiles calculated on live and 7-day consolidated viewing

LOVE ISLAND (ITV2, 14/06/19), AGE PROFILE BY DEVICE



Source: BARB, profiles calculated on live and 7-day consolidated viewing

FLEABAG (BBC1, 04/03/19-08/04/19), GENDER PROFILE VS AVERAGE



Source: BARB, profiles calculated on live and 7-day consolidated viewing

Note: Average gender profile for TV set is based on the BBC1 timeslot average for 2019. Average gender profile for PCs and tablets is based on all BBC1 programmes with device viewing in March-April 2019.

THE SVOD REPORT 2020

The 2010s saw a seismic change in how British viewers could watch television, with an explosion in the number of platforms, devices and catch-up services available. The only constant was that the British love affair with the TV set remained undiminished; the total daily time spent with a TV set in 2019 was 242 minutes, the same as in 2010. However, TV set use changed significantly over the decade.

One change is the ability to access subscription video on-demand (SVOD) services, and with the BARB Establishment Survey tracking the take-up of SVOD subscriptions in UK homes (chart 1), the trend is clear. In Q4 2019, the proportion of homes that had a subscription to at least one of Netflix, Amazon Prime Video or Now TV was 50.5%, a majority of homes for the first time. Overall, 14.3 million UK households had one of these SVOD services, an increase of 2.0 million homes (16%), compared with Q4 2018.

Netflix and Amazon saw similar levels of growth in the number of households that subscribe to their services. Amazon's increase represents a larger year-on-year percentage growth of 35% to 7.1 million homes, versus Netflix's 20% increase to 12.4 million homes, due to Amazon's lower number of subscribers.

The number of homes with access to more than one SVOD service has also gone up. As of Q4 2019, 6.0 million homes had access to two or more services.

We can also look at the progression of these overlapping subscriptions. Chart 2 compares the Q4 2019 data with Q4 2017 and Q4 2015. Compared with Q4 2015, the number of UK homes with a subscription to at least one of the three SVOD services has more than doubled. Of these homes, just over 42% take more than one service – with the proportion

that takes only one continuing to decline. In Q4 2015, homes that had Netflix as their only service represented almost two-thirds of SVOD households. That figure is now at 45%, but we can see that Netflix has not lost those customers, rather these Netflix homes have added other SVOD services.

Netflix and Amazon is the most popular combination and has increased significantly, from 9% of SVOD homes in Q4 2015 to almost one in three now. This may be because Amazon offers other benefits as well as television content. The number of households that can't miss out on any service is also growing; homes with a subscription to all three services now represent 6% of total SVOD households.

The UK SVOD market is continuing to fragment with the launch of new services like Disney+ and Apple TV+, so it will be interesting to monitor how the various overlaps develop.

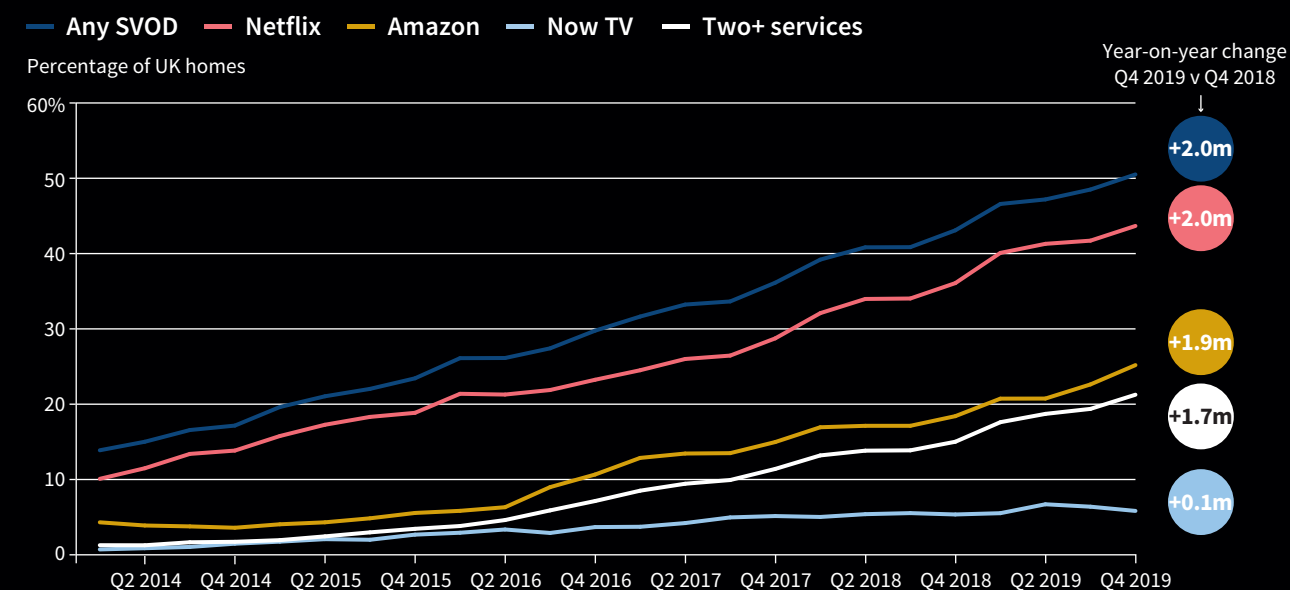
Establishment Survey data also provide an insight into the age profile of SVOD users. We can compare Q4 2014 data with Q4 2019 data to see how the proportion of subscribers from different age groups has changed for each of the three SVOD services.

Chart 3 illustrates that in Q4 2014, younger age groups made up the highest proportion of users for the SVOD services, as you might expect from early adopters of new technology. For example, 62% of Netflix users were then aged under 35, with similar proportions for the other two services.

A younger skew to these services remains in Q4 2019, but there has been a larger proportional growth among older audiences. Users aged 55-74 have increased the most of any group, particularly for Amazon, where the proportion of these users doubled from 2014 to 2019 to 16% of the total.

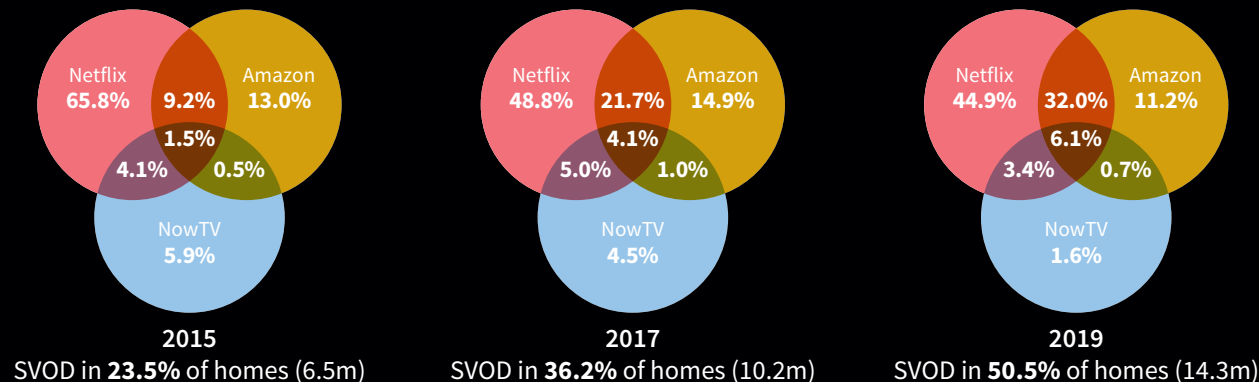
IN Q4 2019, A MAJORITY OF HOMES HAD A SUBSCRIPTION TO AT LEAST ONE OF NETFLIX, AMAZON PRIME VIDEO OR NOW TV

CHART 1: SVOD HOUSEHOLDS



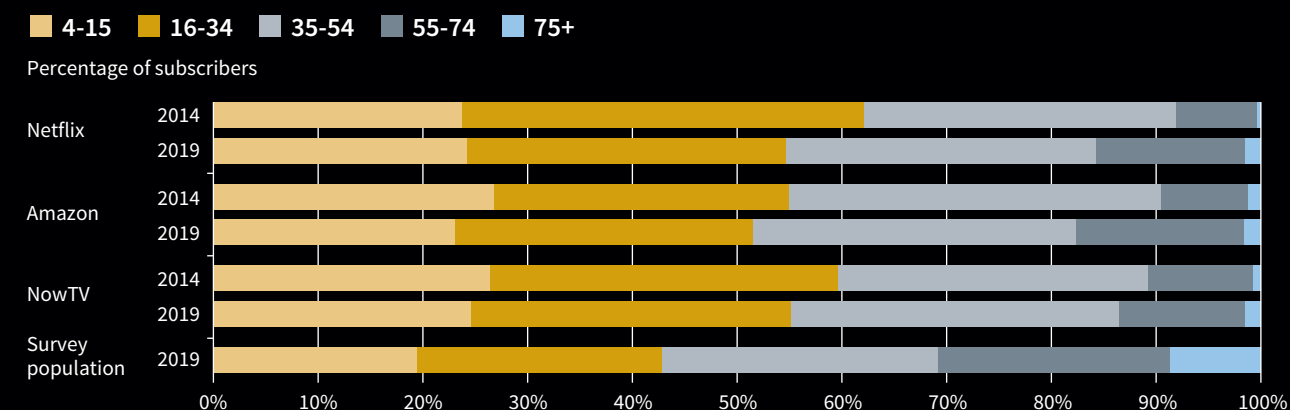
Source: BARB Establishment Survey. Household weight

CHART 2: SVOD SUBSCRIPTIONS OVERLAP



Source: BARB Establishment Survey Q4 2015, 2017, 2019. Household weight. Percentages based on homes with an SVOD subscription

CHART 3: AGE PROFILE OF SVOD SUBSCRIBERS



Source: BARB Establishment Survey, Q4 2014 v Q4 2019. Population weight. Survey population data based on Establishment Survey Q4 2019

→ Although older SVOD audiences have grown over the last five years, these groups are still under-represented when compared to their proportion of the general population (see final bar), with younger audiences over-represented. Those aged 55-74 were 22% of the UK population in Q4 2019. While it may be unlikely that the age profile of SVOD service users will reach parity with the general population, it suggests that older audiences could be a subscriber growth opportunity for SVOD services.

As SVOD subscription levels rise, we have seen an increase in unidentified viewing, which includes all TV set use that BARB cannot yet identify. This includes viewing to programmes more than 28 days after broadcast, gaming, watching DVDs and watching SVOD services or online video platforms. Unidentified viewing now accounts for 52 minutes of TV set viewing per day on average, or a 21% share of TV set viewing for all individuals, an 8.5% growth since 2018. Over the same period, viewing to BARB-reported channels fell by 4% to 191 minutes per day.

It is possible to break down unidentified viewing by ethnic group (chart 4). It's clear that the increase in unidentified viewing is universal – every ethnic group does more unidentified viewing now than five years ago.

There is a wide spread in the levels of unidentified viewing. For example, in black Caribbean (including mixed white/black Caribbean) homes, unidentified viewing is now 66 minutes a day on average, higher than for all individuals. This is more than 15 minutes a day greater than the 49 daily average minutes in Bangladeshi/Indian/Pakistani homes. However, these two figures are both around 30% of the total TV set viewing time in these homes – so there is also a higher amount of TV set usage in black Caribbean homes, compared to other ethnic groups.

In fact, for all ethnic groups apart from white homes, the proportion of total TV set viewing time that is unidentified is greater than the average for all individuals. Whether these high levels of unidentified viewing are driven by SVOD services, gaming, or by viewing to overseas-based channels not measured by BARB (or any combination of these), it is clear that viewer behaviour is not one-size-fits-all.

BARB data reveal that unidentified use

of the TV set is increasingly becoming a primetime activity. Chart 5 looks specifically at the 9-10pm slot for every day of the year to see whether it was won by unidentified viewing as a whole, or a BARB-reported channel. There were 110 days in 2019 when aggregate unidentified viewing was ahead of any single BARB-reported channel in the 9pm slot, almost double the 2018 figure. In a timeslot where broadcasters air their best programming, they are increasingly competing with unidentified use of the TV set as well as with one another.

It is important to note that by taking unidentified viewing as a whole, we are not comparing BARB-reported channels with SVOD viewing alone, let alone viewing to individual SVOD services, as unidentified viewing includes anything that isn't viewing to a BARB-reported channel. We have excluded unidentified viewing via a games console from this analysis, to reduce the likelihood that the use of the TV set is for gaming. That said, the pattern is clear.

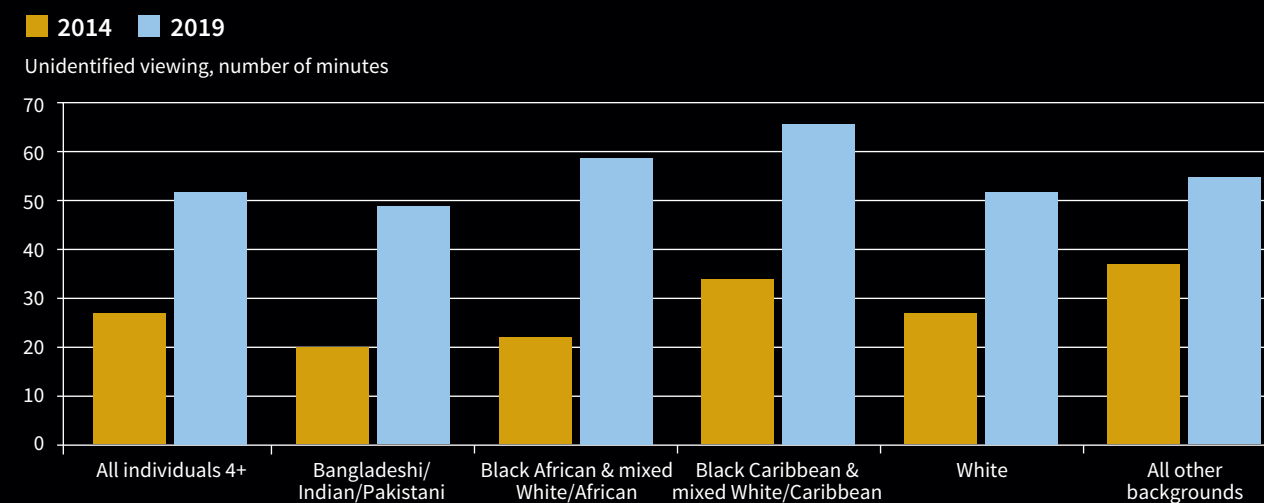
We know that there is a significant correlation between the increase in unidentified viewing and the rise in the number of SVOD subscriptions. Chart 6 demonstrates the strength of this correlation since 2014, with an almost-perfect R^2 of 0.97. This illustrates that SVOD services are the major factor leading to the growth in unidentified viewing.

The SVOD services have been the catalyst for significant transformation over the past decade; that these three services have got into half of UK homes in this time is a major change to the television landscape.

We know that finding out how much TV set viewing is accounted for by SVOD services is high on the industry's wish list. BARB began rolling out router meters to panel homes in October 2019. One of the major benefits is that router meters will enable us to measure SVOD viewing at an aggregate level. Alternatively, should these services decide to be BARB-reported, we can also measure audiences to their individual programmes with the same technology we use to measure viewing to broadcasters' non-linear content. Either way, by 2021, we expect to have a great deal more insight into SVOD viewing.

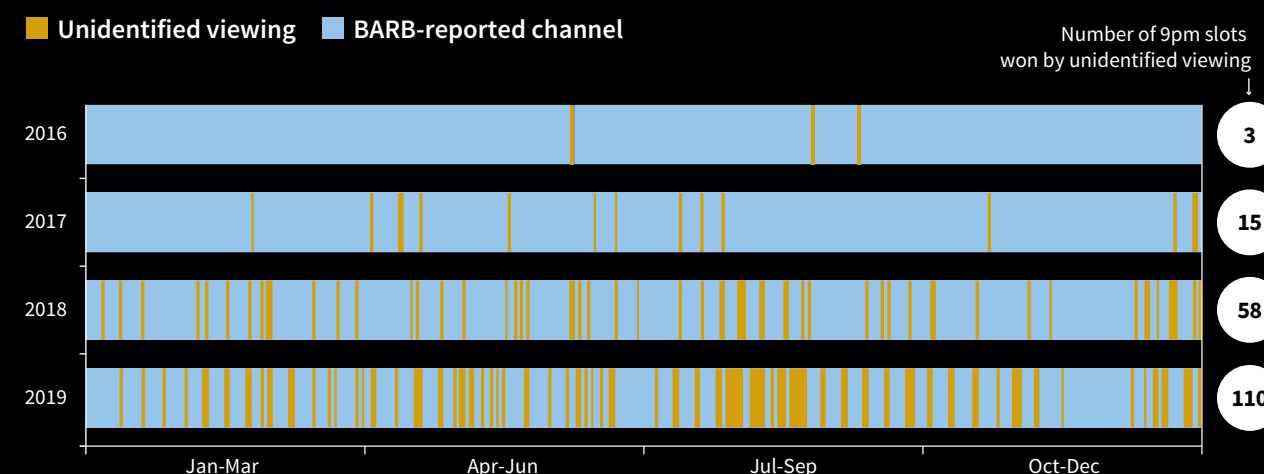
EVERY ETHNIC
GROUP
DOES MORE
UNIDENTIFIED
VIEWING NOW
THAN FIVE
YEARS AGO

CHART 4: UNIDENTIFIED VIEWING BY ETHNIC GROUP



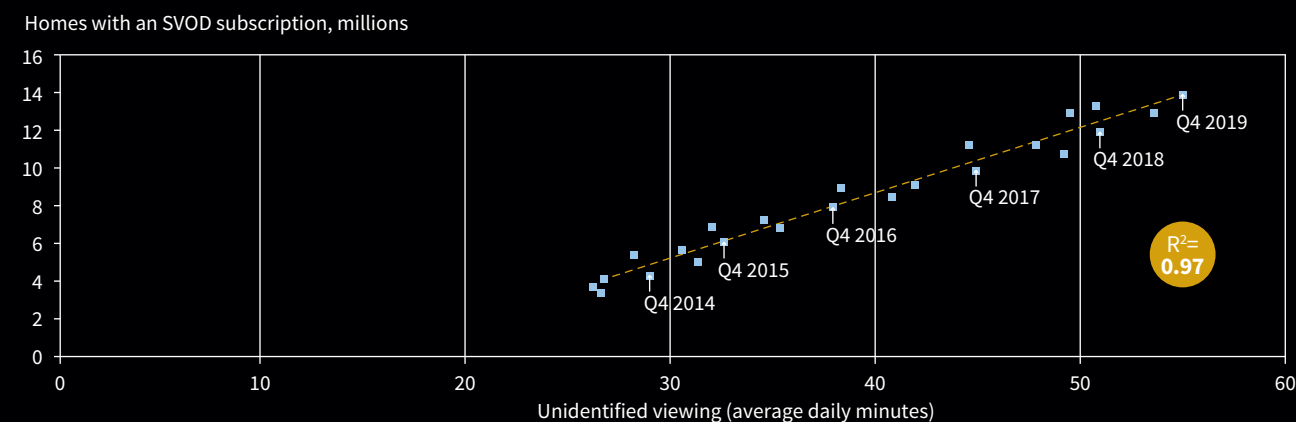
Source: BARB All individuals 4+

CHART 5: 9PM TIMESLOT WINNER: UNIDENTIFIED VIEWING VS BARB-REPORTED CHANNEL



Source: BARB TV set viewing for all individuals 4+. Analysis excludes games consoles from unidentified viewing. Average minutes viewed in 9pm slot defined as 21:00:00 – 21:59:59

CHART 6: UNIDENTIFIED VIEWING VS SVOD PENETRATION



Sources: BARB panel: average quarterly unidentified viewing; BARB Establishment Survey: SVOD penetration

TREND SPOTTING

Every year in The Viewing Report, BARB examines UK television viewing behaviour in the previous year from three key angles:



Timeshift – how much timeshifted television did UK viewers watch? When and why did timeshifted viewing peak and dip? Which genre was the most timeshifted? And which demographic and region were responsible for the most timeshifted viewing?



Share by genre – How did the genres rank by share of total TV viewing? Which genres saw significant increases or decreases in their share, and why?

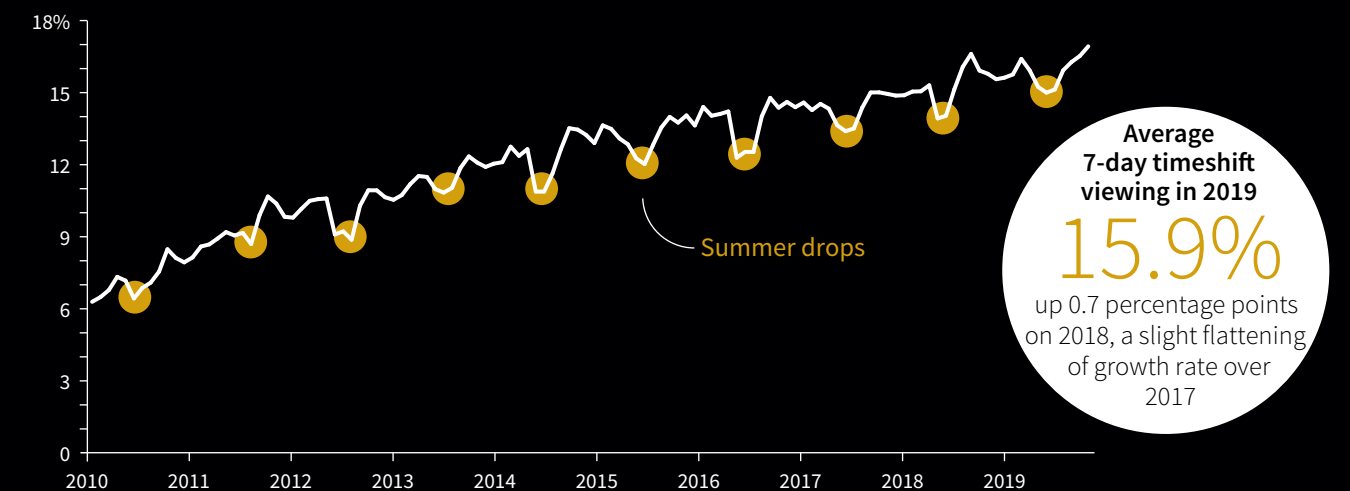


Share by broadcaster – How did the major broadcaster groups rank by share of audience? Which of their channels had the highest share?

Over the next three pages, we'll find out the answers to these questions for 2019 viewing.

For further updates on viewing trends, check out the Trendspotting tab on the BARB website, which features quarterly trackers of metrics such as device access, SVOD households and UK households by TV platform.

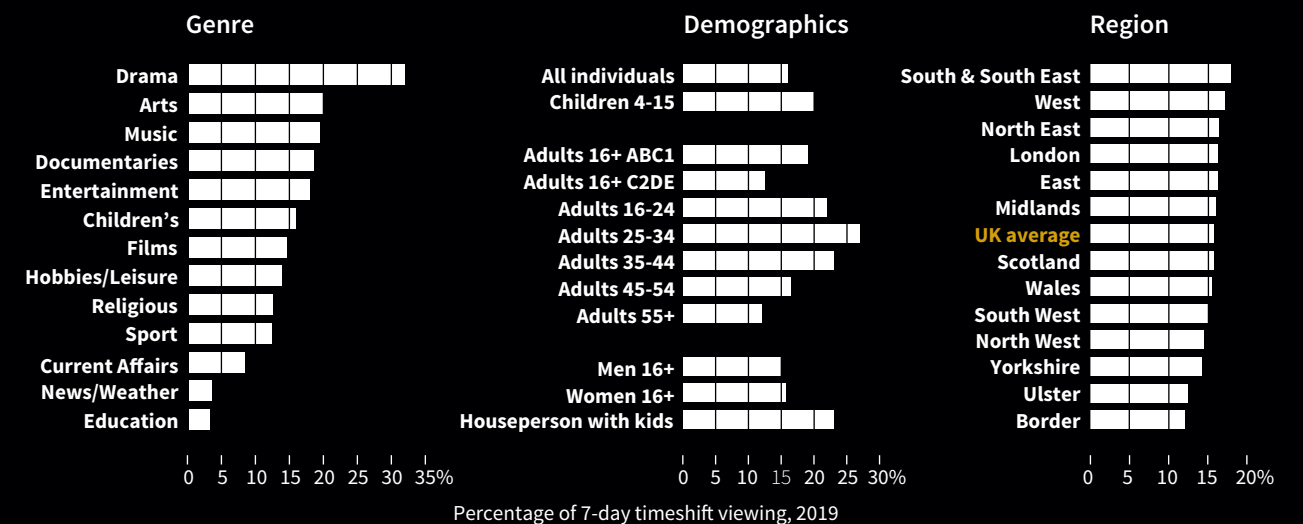
WE CONTINUE TO WATCH MORE TIMESHIFTED TELEVISION



Although timeshifted viewing continues to see overall increases in the long-term, there was a slight flattening in the growth rate this year, with a 0.7 percentage point rise over 2018. This

compared to 0.9 points from 2017 to 2018. With no summer football tournament this year, declines in this period were less than in 2018.

TIMESHIFTING BY...

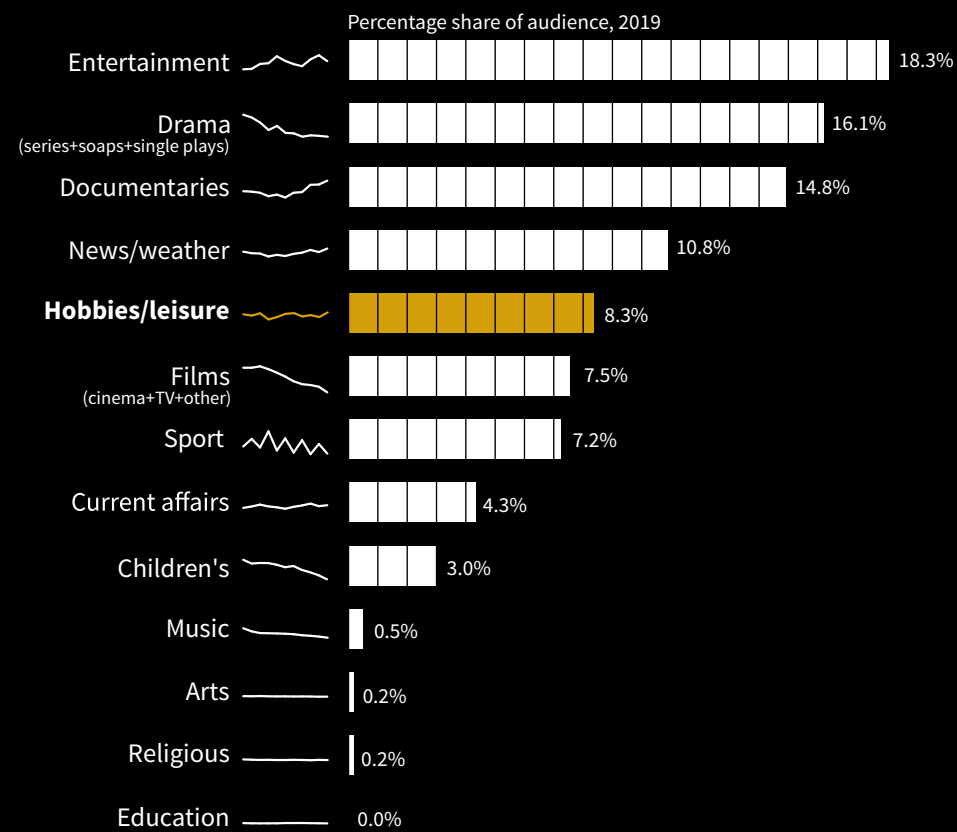


In 2019, drama continued to be the genre that saw the most timeshifted viewing, with almost 33% of viewing occurring after a live broadcast. Once again, adults 25-34 led the way in timeshifted viewing, with a 2.7 percentage point uplift on 2018,

to over 25% of their viewing. The North East saw an uplift in timeshifted activity, increasing 1.4 percentage points over 2018 and moving above the national average.

THE GENRE RANKINGS

Trend in % share of audience, 2009-2019



With entertainment remaining the leading genre, it's interesting to note that the drama category has stabilised somewhat after declines in the early 2010s. Levels for drama have now been flat since 2016. With 2019 lacking a sporting event on the same scale as the 2018 FIFA World Cup, this genre experienced its usual odd-year drop, despite the strong showing of the FIFA Women's World Cup and the Men's Rugby World Cup. This fall for sport, along with the continued longer-term decline in the amount of viewing taken by the film genre, has allowed hobbies/leisure to move up two ranking places to fifth overall, its highest-ever position. And in a year where there were also plenty of talking points for the news genre, this increased to 10.8% of viewing, another record amount.

FOCUS ON HOBBIES/LEISURE

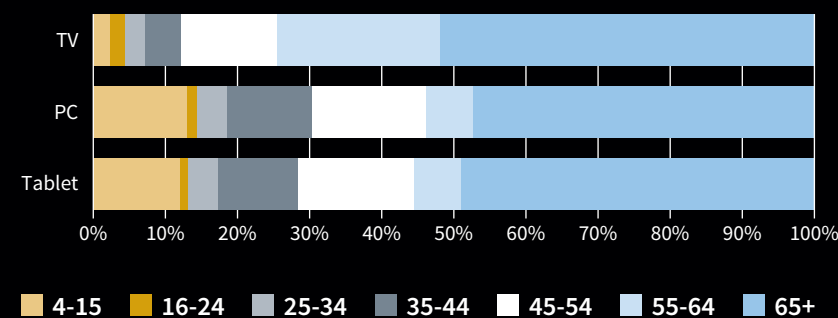
From long-running stalwarts like BBC1's Antiques Roadshow, to newer favourites like Channel 4's Escape to the Chateau or ITV's Love Your Garden, the hobbies/leisure genre continued to strengthen in 2019. The Christmas special of BBC1's The Repair Shop, one of the most-watched broadcasts in the genre this year,

also demonstrated that viewing on a non-TV device is not always only for younger demographics. 51% of the show's audience on TV sets was from viewers 65+, and viewing on PCs and tablets also saw a similar skew, with 47% and 49% respectively.

Over
55%
of all individuals 4+
watched 50 or more broadcasts
from the hobbies/leisure
genre in 2019*

THE REPAIR SHOP AT CHRISTMAS, BBC1, 29/12/19

Viewers, percentage by age



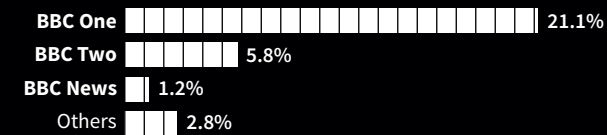
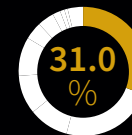
* All individuals aged 4+ that viewed for at least three consecutive minutes

Source: BARB

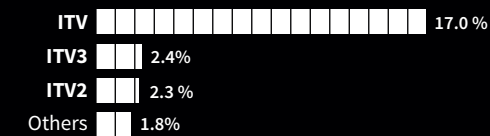
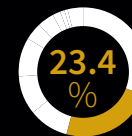
TOP TEN BROADCASTER GROUPS

% share of audience, 2019

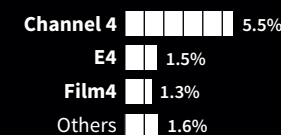
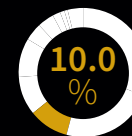
BBC



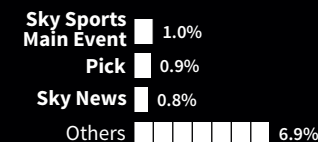
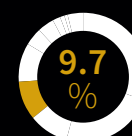
itv



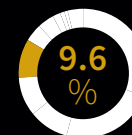
4



sky



VIACOMCBS

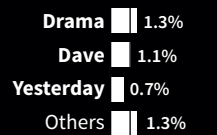
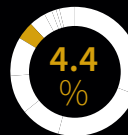


A number of mergers and acquisitions impacted the top ten broadcaster groups in 2019: the addition of the NBCUniversal channels to Sky; the merger of Viacom and CBS; and Discovery's acquisition of some former UKTV channels. These moves

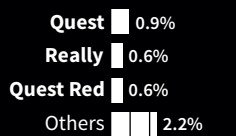
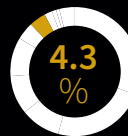
*Includes all Sky channels and the NBCUniversal portfolio of channels, all under Comcast ownership.

Source: BARB. All channels include HD and/or +1 variants where applicable. Share based on Individuals 4+. Broadcaster groups have been defined based on channel portfolio as of 31/12/19.

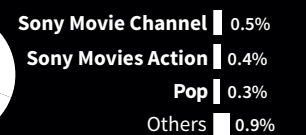
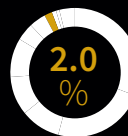
UKTV



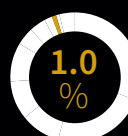
Discovery CHANNEL



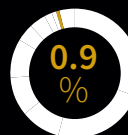
SONY PICTURES TELEVISION



Disney



A+E NETWORKS UK



created space in the top ten for A+E Networks and The Walt Disney Company, the latter of which benefited from the arrival of the former Fox Networks Group channels into its portfolio.

BARB TRAINING

There are a number of ways in which BARB customers can access training and support:

● **BARB online training module** – this viewing training course has been updated to include the new unduplicated multiple-screen programme reach and time spent viewing data. It is available free-of-charge to BARB customers, who can complete the course at their own pace. Visit www.barb.co.uk/training/ to sign up.

● **BARB Boot camp** – This two-hour session for BARB customers provides an introduction to BARB for new starters in the industry, covering what BARB is and how viewing data are collected.

● **BARB Reboot** – This two-hour session for BARB customers is designed for more experienced BARB data-users who want to

find out what more they can do. It covers the structure of the data and more advanced analyses.

● **BARB roadshow presentation** – BARB takes a tailored presentation covering the latest insights, project launches and future development roadmap out to BARB clients.

To book a BARB Boot camp session, please email BARB's Client Services Manager, Sarah Mowbray: sarah.mowbray@barb.co.uk.

To book a BARB Reboot session, roadshow presentation, or for any questions related to the online training module, please contact BARB's Insight Manager, Jeremy Martin: reboot@barb.co.uk



FIND OUT MORE

If you have any questions on The Viewing Report, please contact BARB's Communications Manager, Jessica Bromley: jessica.bromley@barb.co.uk.

There is also plenty of information and viewing data available on our website.

To keep up to date with the latest news and insight from BARB, follow us on LinkedIn and Twitter 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.

🌐 www.barb.co.uk

✉️ enquiries@barb.co.uk

🌐 **Broadcasters' Audience Research Board**

🐦 [@BARBtelevision](https://twitter.com/BARBtelevision)

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