

CMR 2015

Annex

Changes in TV viewing habits

August 2015

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About this slide pack

About this slide pack

- This slide pack was created as part of our assessment of the second consecutive year of decline and changing viewing habits in reported broadcast TV viewing.
- It uses viewing data from the Broadcasters' Audience Research Board (BARB) to analyse where the decline has taken place, and factors behind the decline, such as age, channel groups and slot times throughout the day.
- It informs much of the *Changes in TV viewing habits* section of the *Market in Context* chapter of the *UK Communications Market Report 2015*.
- This pack contains the slides used in the *Changes in TV viewing habits* section, for context and consistency, plus additional data and analysis not included within the chapter.

BARB-measured viewing

Industry-standard BARB data captures viewing of broadcast television programming, on TV sets, up to seven days after broadcast. This seven-day 'gold standard' dataset is the basis of much of the analysis within this pack.

Time-shifted viewing includes watching programmes on recording devices such as digital video recorders (DVRs) (e.g. Sky+, TiVo or YouView+) as well as catch-up services (like BBC iPlayer and All4) through smart TVs as well as devices such as games consoles and set-top boxes attached to the TV set .

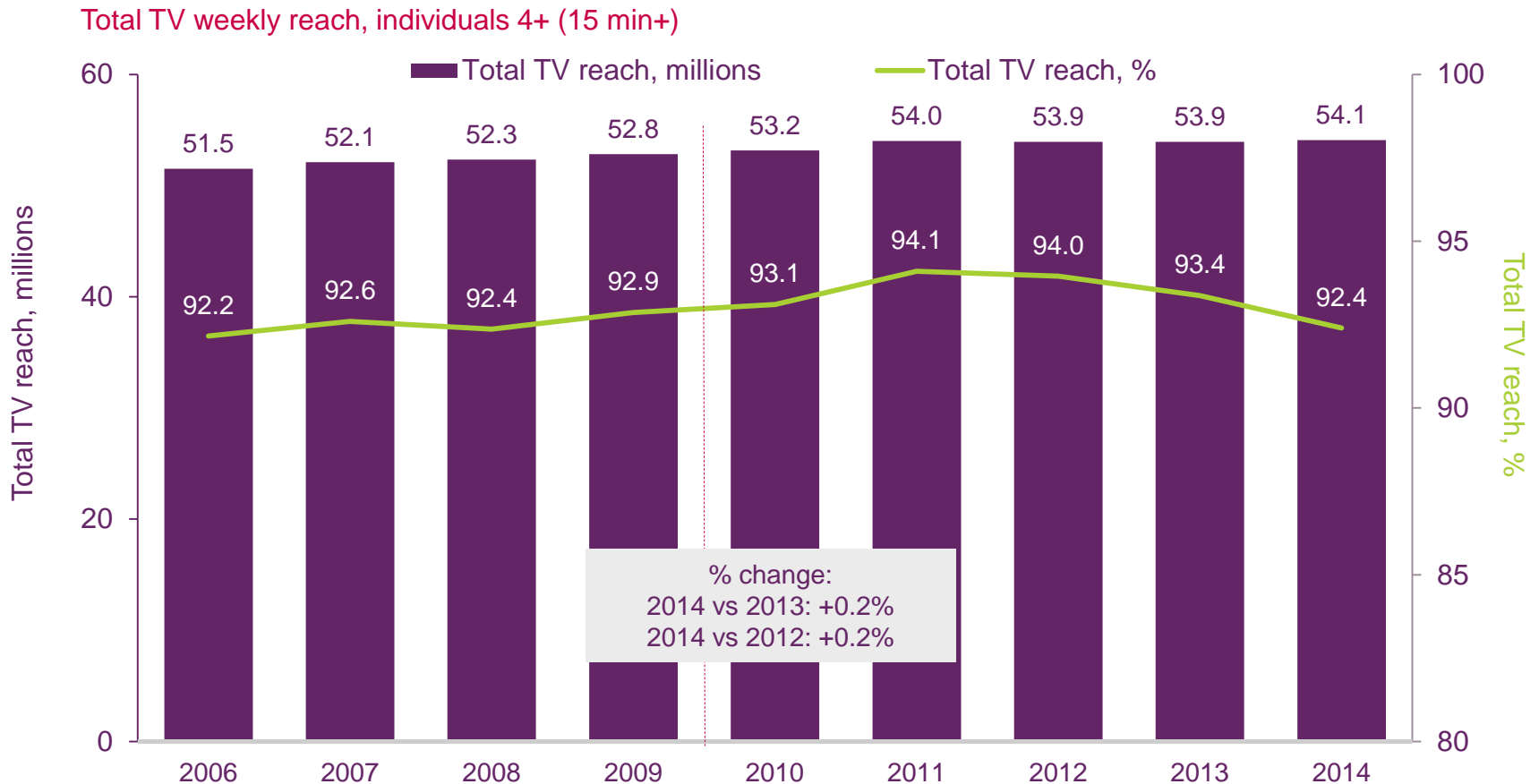
Currently not measured are: non-broadcast TV programmes and films, such as those accessed from pay-per-view on-demand library services, and subscription video-on-demand services such as Netflix, Amazon Prime Instant Video and Now TV.

Viewing to broadcast content that is done through laptops and tablets and other devices such as smartphones not attached to the TV screen are not currently included in reported viewing estimates.

BARB is developing a method of capturing online viewing, and viewing via devices that are not attached to the TV screen, to create a unified viewing metric, in an initiative known as Project Dovetail.

Overview of year-on-year viewing

The proportion of the population who watch broadcast TV in an average week remains high but has been falling since 2012. It fell from 93.4% in 2013 to 92.4% in 2014.



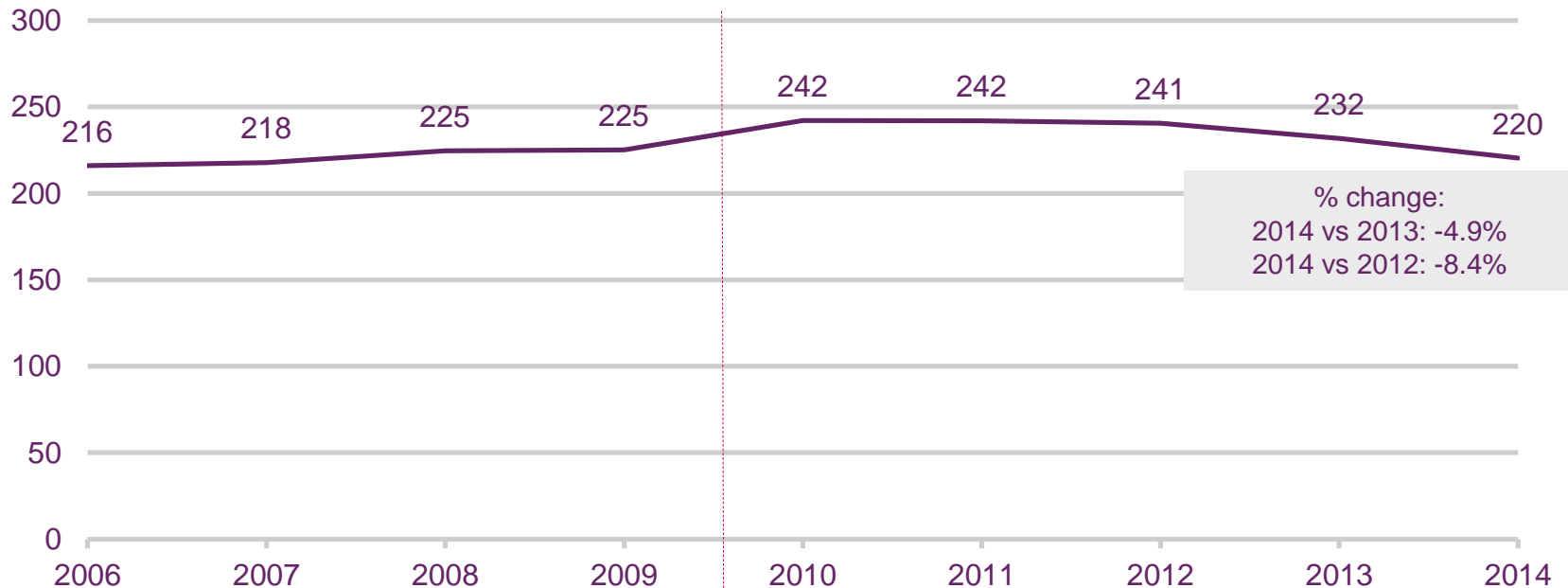
Source: BARB, individuals 4+, network, total TV

Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used.

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Average daily viewing to broadcast TV fell by 11 minutes from 232 minutes per person in 2013 to 220 minutes per day in 2014. This follows a 9-minute decline between 2012 and 2013, taking the combined fall to 20 minutes in the past two years.

Average minutes of broadcast TV viewing per person per day: Total TV, individuals 4+

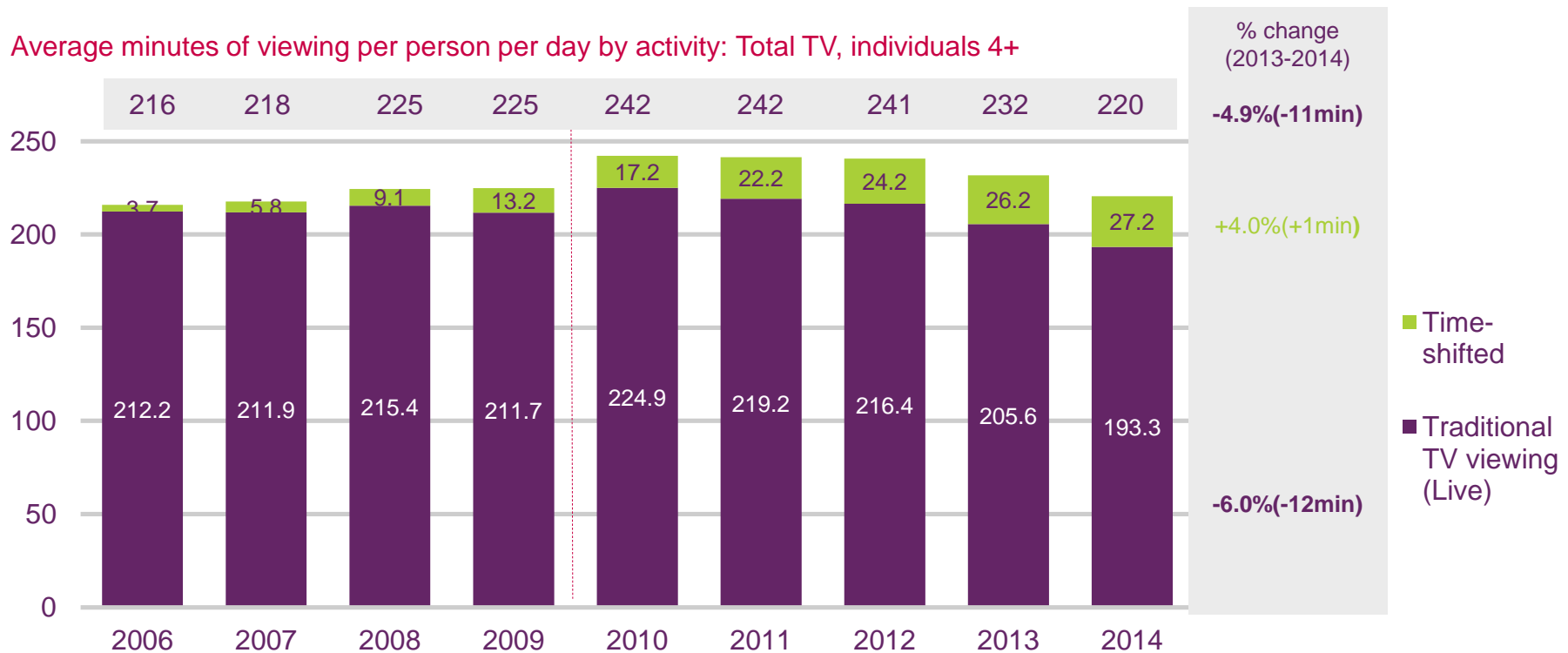


Source: BARB, individuals 4+, network. BARB gold standard viewing of live plus 7 day time-shifted.

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

All of the 2013-2014 decline was to traditional live TV (11 minutes); a one-minute rise in time-shifted viewing was unable to offset the loss.

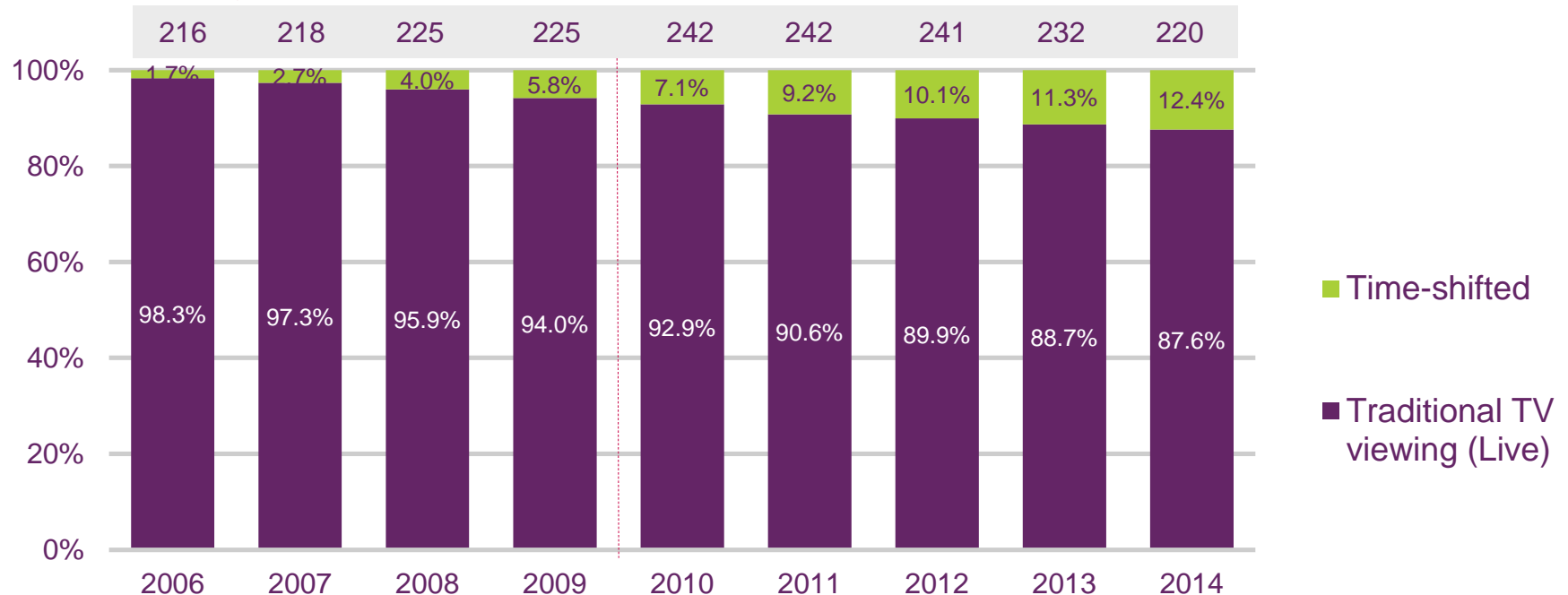
Average minutes of viewing per person per day by activity: Total TV, individuals 4+



Source: BARB, individuals 4+, network, total TV. Some variation in figures due to rounding
 - New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

As a proportion of all viewing, time-shifted viewing increased, and accounted for 12.4% of all broadcast TV viewing in 2014, up from 11.3% in 2013.

Share of viewing/day by activity: total TV, individuals 4+

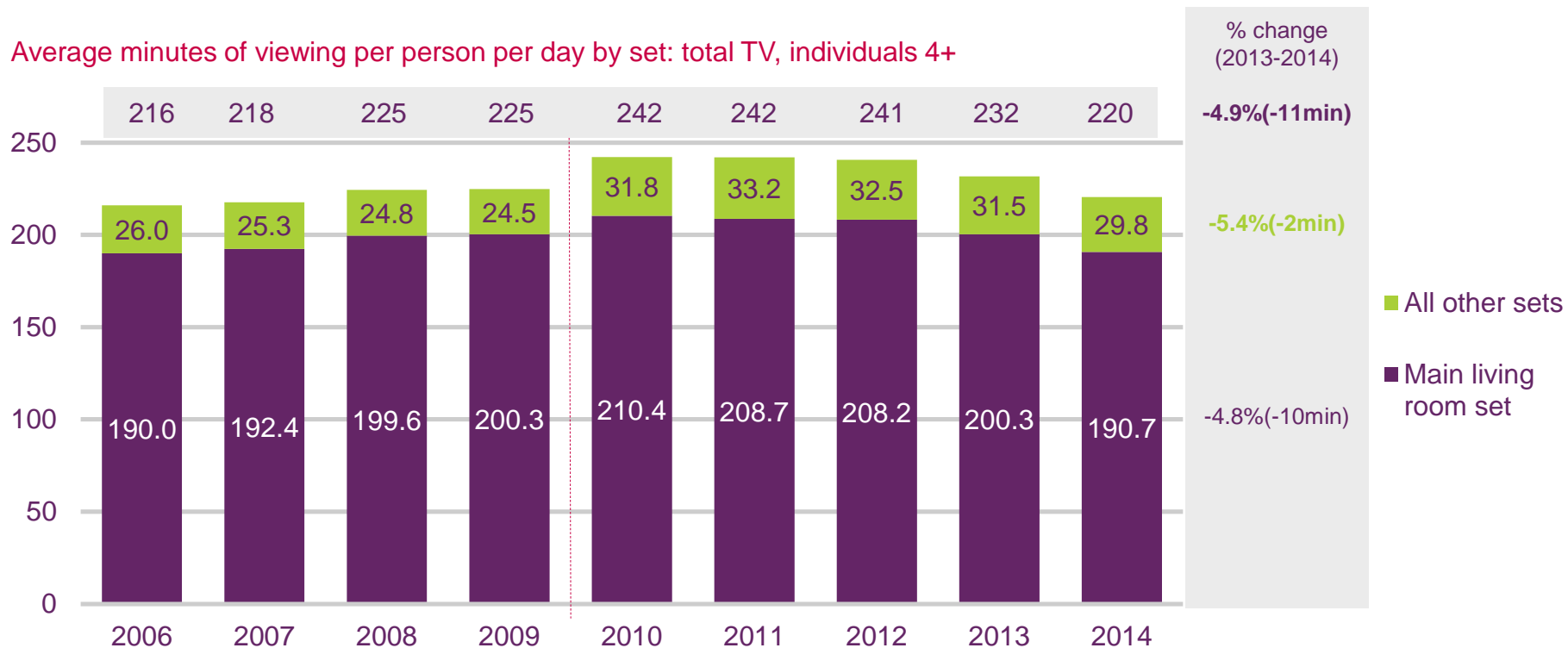


Source: BARB, network – Some variation in figures due to rounding

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Almost all the 11-minute fall in viewing between 2013 and 2014 was on the main living room set, but viewing also fell on secondary sets.

Average minutes of viewing per person per day by set: total TV, individuals 4+

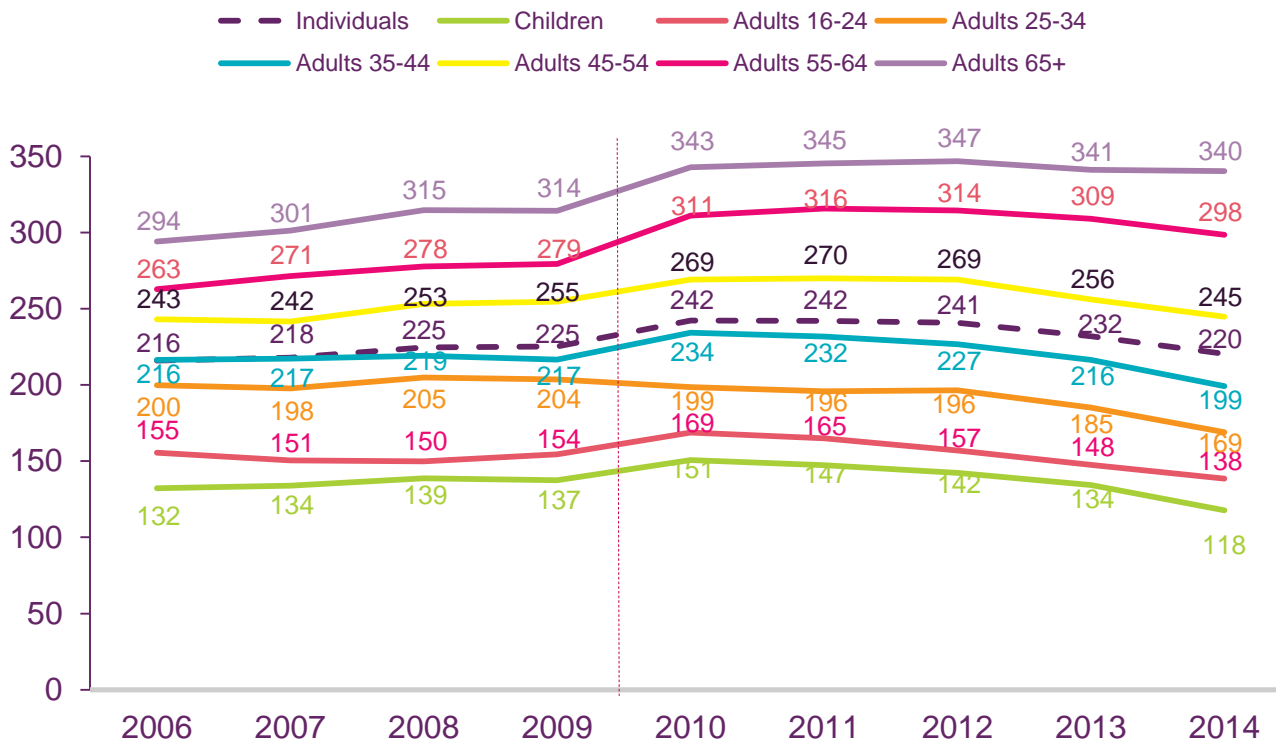


Source: BARB, network – Some variation in figures due to rounding

-New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

The 2013-2014 decline in daily viewing was across all age groups, with a distinct split between the under- and over-45s compared to the average. The reduction varied from 17 minutes a day among children to one minute per day among viewers aged 65 or over.

Average minutes of viewing per person per day by age group: total TV



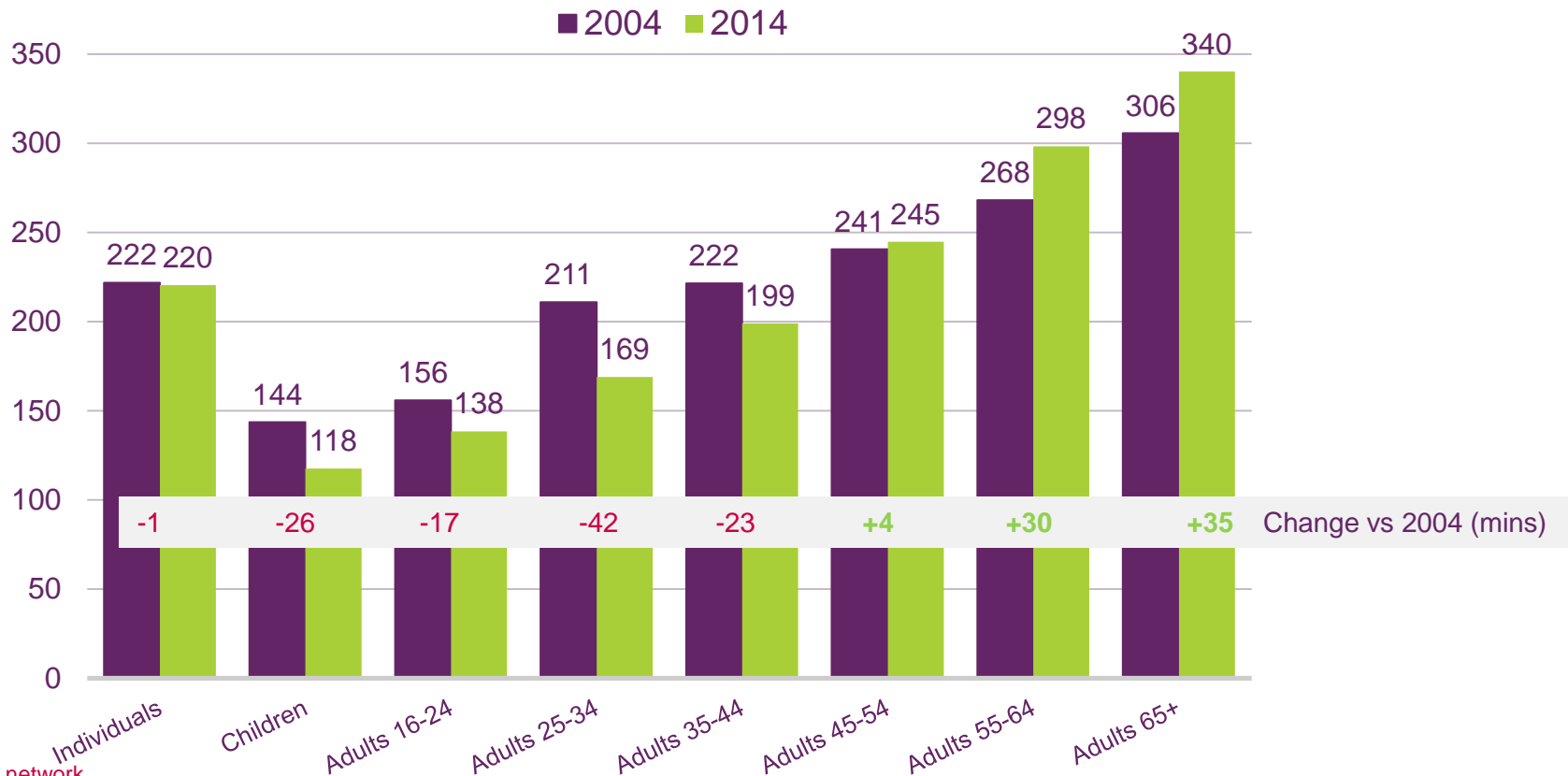
	% change: 2013-2014*
All Individuals	-4.9% (11min)
Children	-12.4%(-17min)
16-24	-6.2%(-9min)
25-34	-8.8%(-16min)
35-44	-8.0%(-17min)
45-54	-4.4%(-11min)
55-64	-3.4%(-10min)
65+	-0.3%(-1min)

Source: BARB, Network. *Data in bold represent above-average falls.

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Taking a longer-term view over ten years, the change in viewing levels varies significantly by age group. The largest falls have been among under-45s, particularly 25-34 year olds.

Average minutes of viewing per person per day by age group: total TV: 2004 vs. 2014

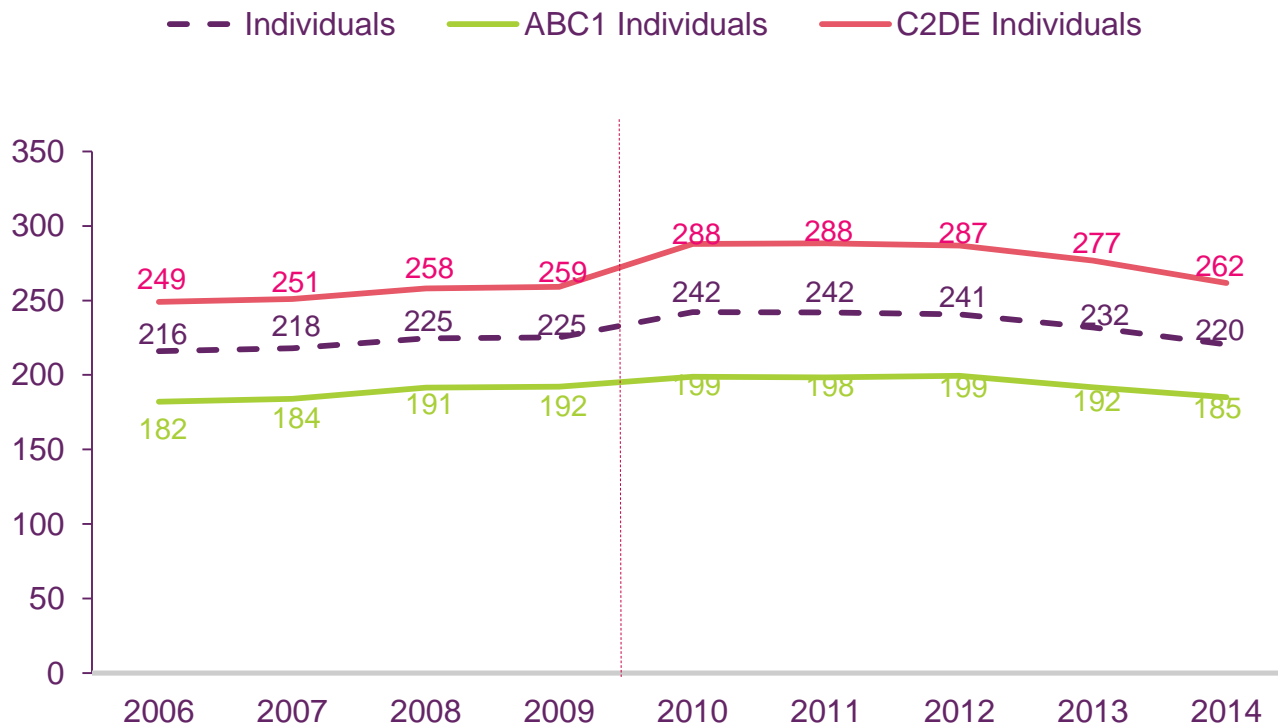


Source: BARB, network

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution.

By socio-economic group, viewing fell by more than average among C2DE viewers (15 minutes per person per day), compared to a below-average fall among ABC1 viewers (7 minutes).

Average minutes of viewing per person per day by SEG: total TV



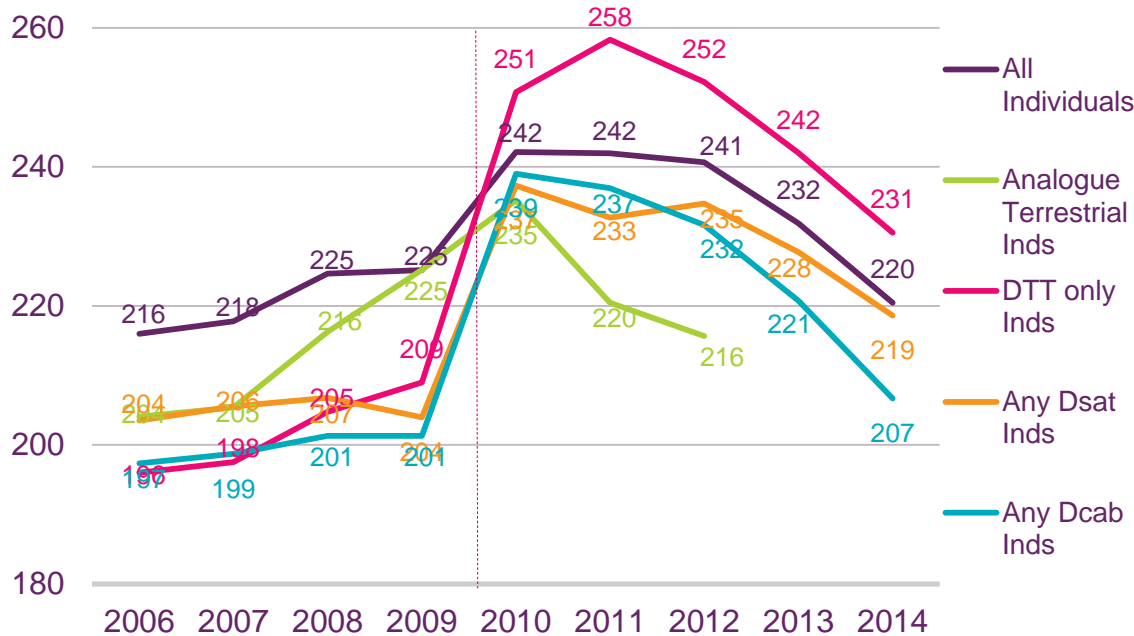
	% change: 2013-2014*
All Individuals	-4.9% (11min)
ABC1 Inds	-3.5%(-7min)
C2DE Inds	-5.5%(-15min)

Source: BARB, network. *Data in bold represent above-average falls.

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

By platform, viewing fell across all homes between 2013 and 2014. The decline in 2014 was highest among digital cable viewers, where TiVo customers can access Netflix on extended trials.

Average minutes of viewing/day by platform: total TV, individuals 4+



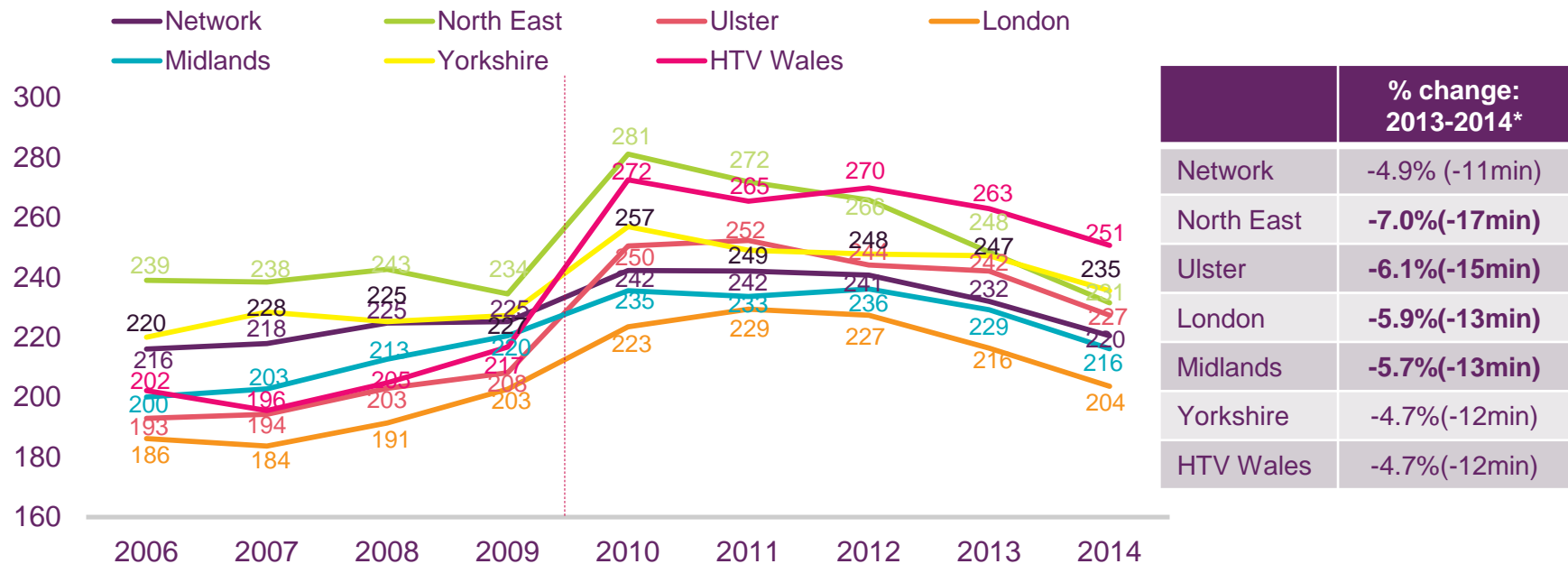
	% change: 2013-2014*
All Individuals	-4.9% (11min)
Analogue terrestrial inds	-
Digital terrestrial only inds	-4.7%(-11min)
Any digital satellite inds	-4.0%(-9min)
Any digital cable inds	-6.4%(-14min)

Source: BARB, All Inds & Analogue Terr: 2006+=Network. DTT only/Dsat/Dcab: 2006-2009=MC Network, 2010+=Network. *Data in bold represent above-average falls.

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

The decline in viewing varied across the nations and regions, with above-average falls in the North East, Northern Ireland, London and the Midlands...

Average minutes of viewing per person per day by TV region: total TV, individuals 4+

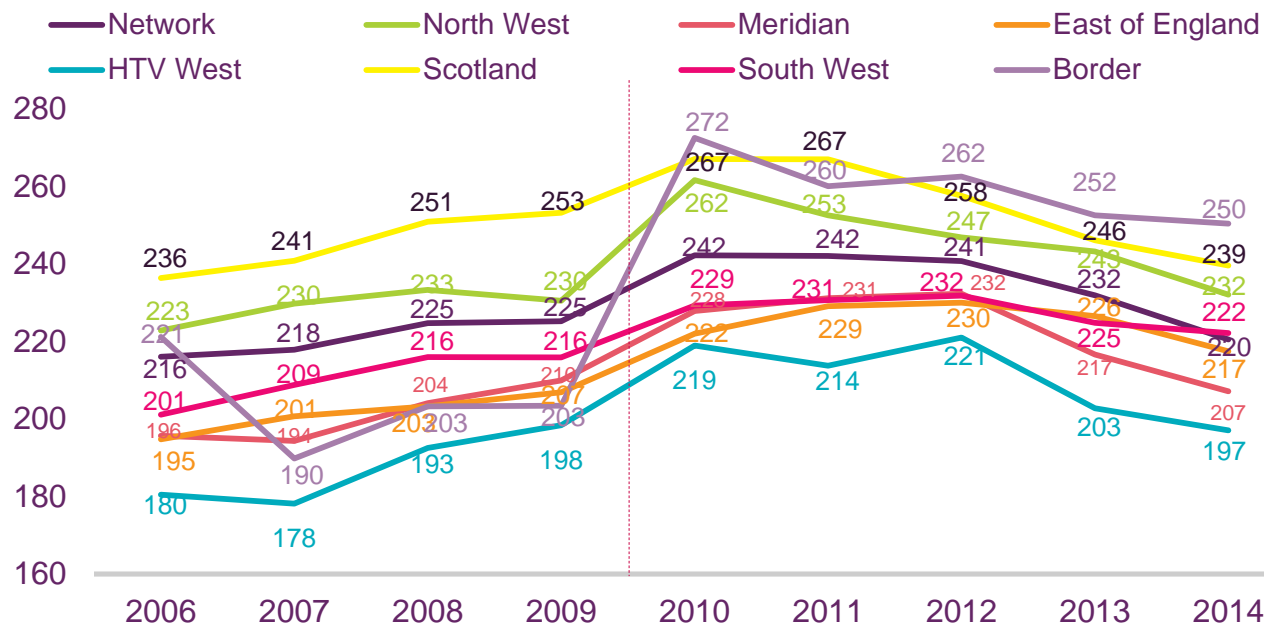


Source: BARB, network. *Data in bold represent above-average falls.

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

...while daily viewing fell least in Border, South West and Scotland.

Average minutes of viewing/day by TV region: total TV, individuals 4+

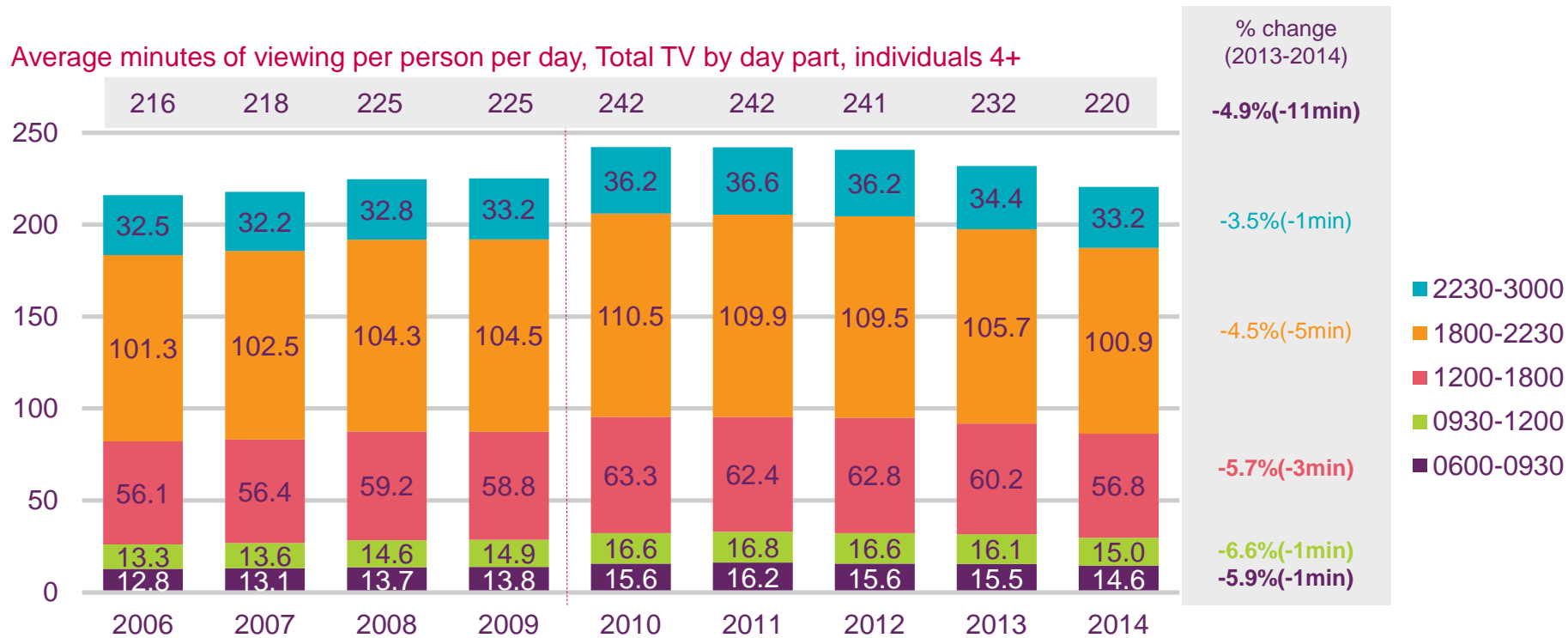


	% change: 2013-2014
Network	-4.9%(-11min)
North West	-4.6%(-11min)
Meridian	-4.4%(-10min)
East	-4.0%(-9min)
HTV West	-2.8%(-6min)
Scotland	-2.7%(-7min)
South West	-1.2%(-3min)
Border	-0.8%(-2min)

Source: BARB, network

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

By day part, the decline in viewing between 2013 and 2014 varied. The largest fall in volume terms was in peak time (6pm to 10.30pm), accounting for around half of the fall. The highest proportional falls were during the morning and daytime before 6pm.

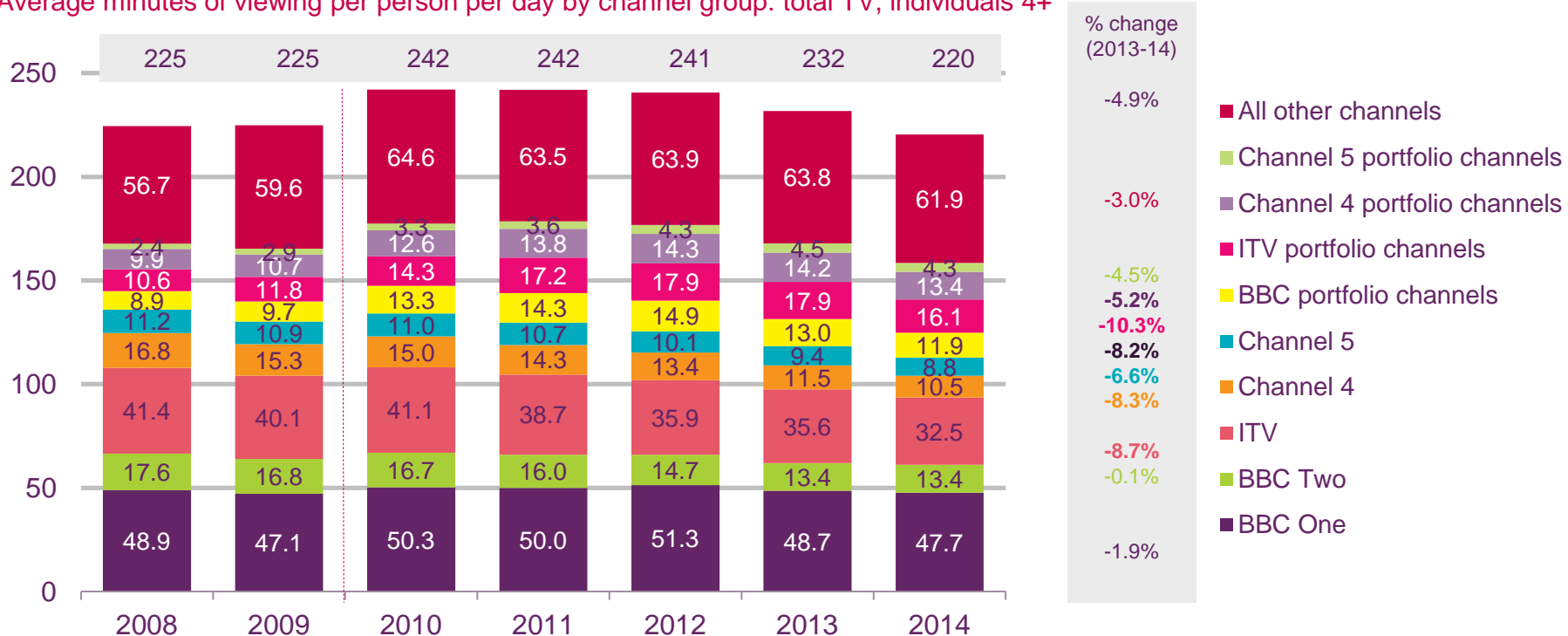


Source: BARB, individuals 4+, network, total TV

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Average daily minutes of television viewing fell across all channel groups between 2013 and 2014. Over 40% (5 minutes) of the total fall in daily viewing was attributed to ITV and its portfolio of channels.

Average minutes of viewing per person per day by channel group: total TV, individuals 4+

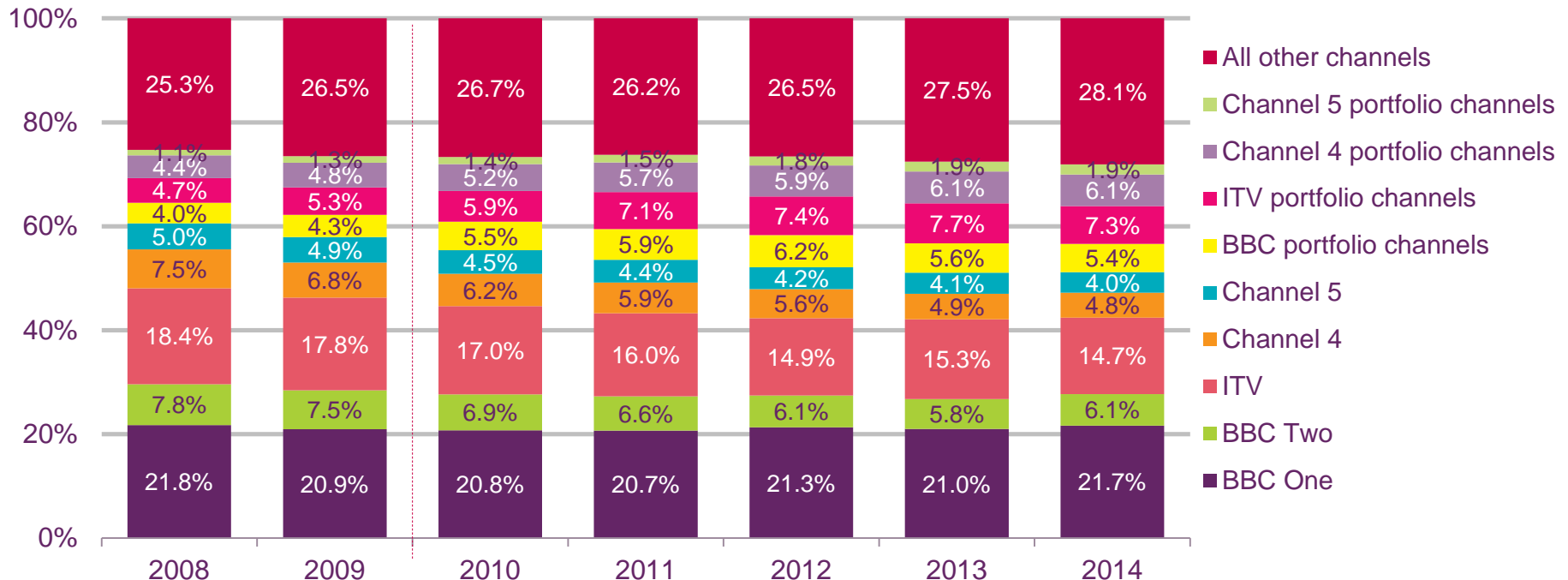


Source: BARB, network

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

As a share of total TV viewing, the ITV main channel and its portfolio channels had the most marked decline in 2014, following an increase between 2012 and 2013. BBC One and Two increased their share, while their portfolio share dipped, and Channel 4, Channel 5 and their portfolio channels stayed stable.

Share of viewing/day by channel group: total TV, individuals 4+

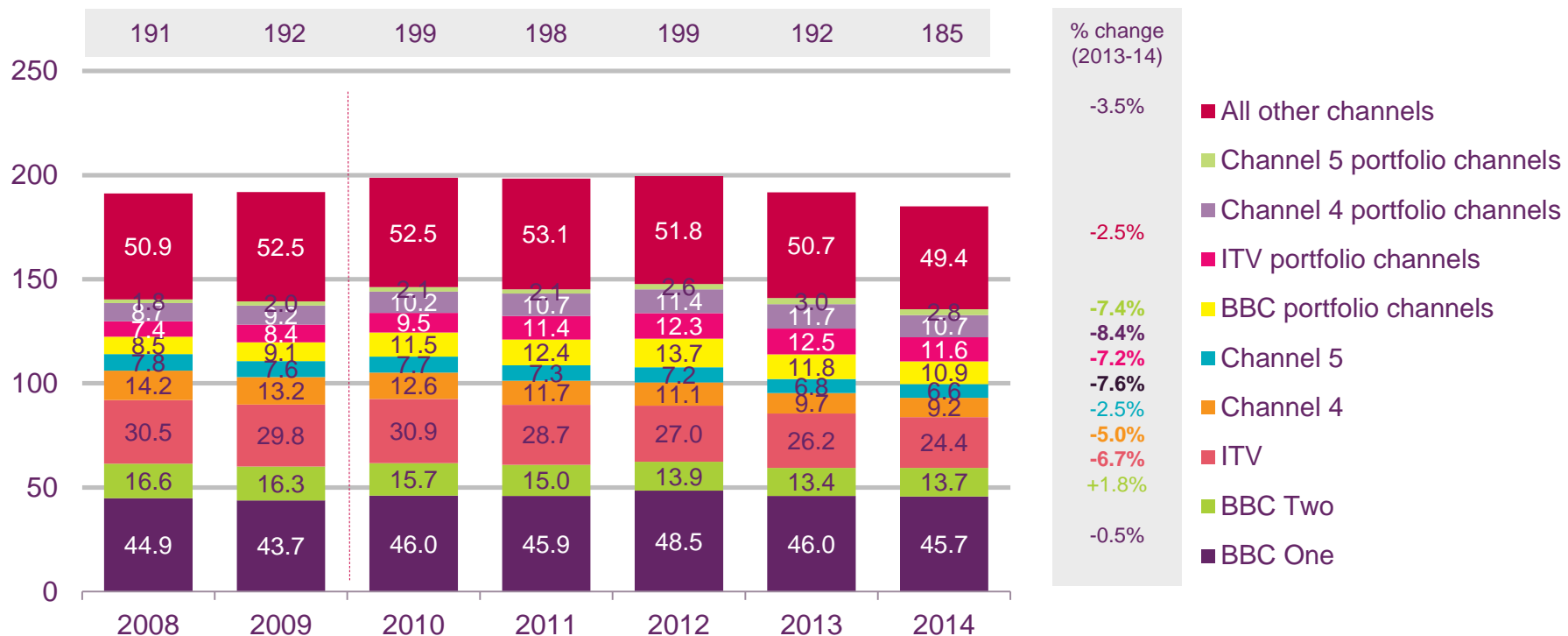


Source: BARB, network

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Among ABC1 viewers, there was a 7-minute decline in average daily viewing between 2013 and 2014. Above-average falls in viewing levels were seen across ITV and Channel 4-owned channels, while BBC Two was the only main PSB channel to see growth.

Average minutes of viewing per person per day by channel group: Total TV, ABC1 individuals

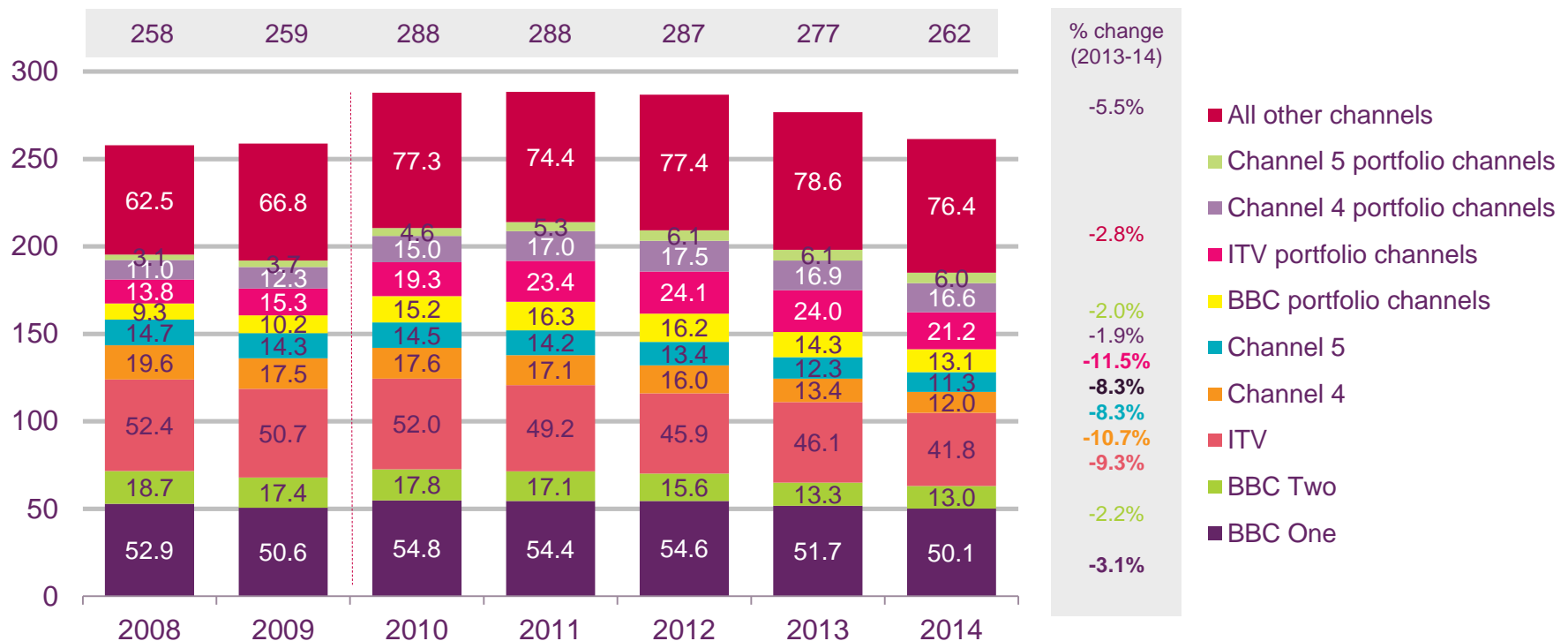


Source: BARB, network

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Viewing among C2DE individuals fell by almost double than among ABC1 individuals (by 15 minutes per day) and across virtually all channel groups. Most of this decline (7 minutes) was across ITV-owned channels.

Average minutes of viewing/day by channel group: total TV, C2DE individuals

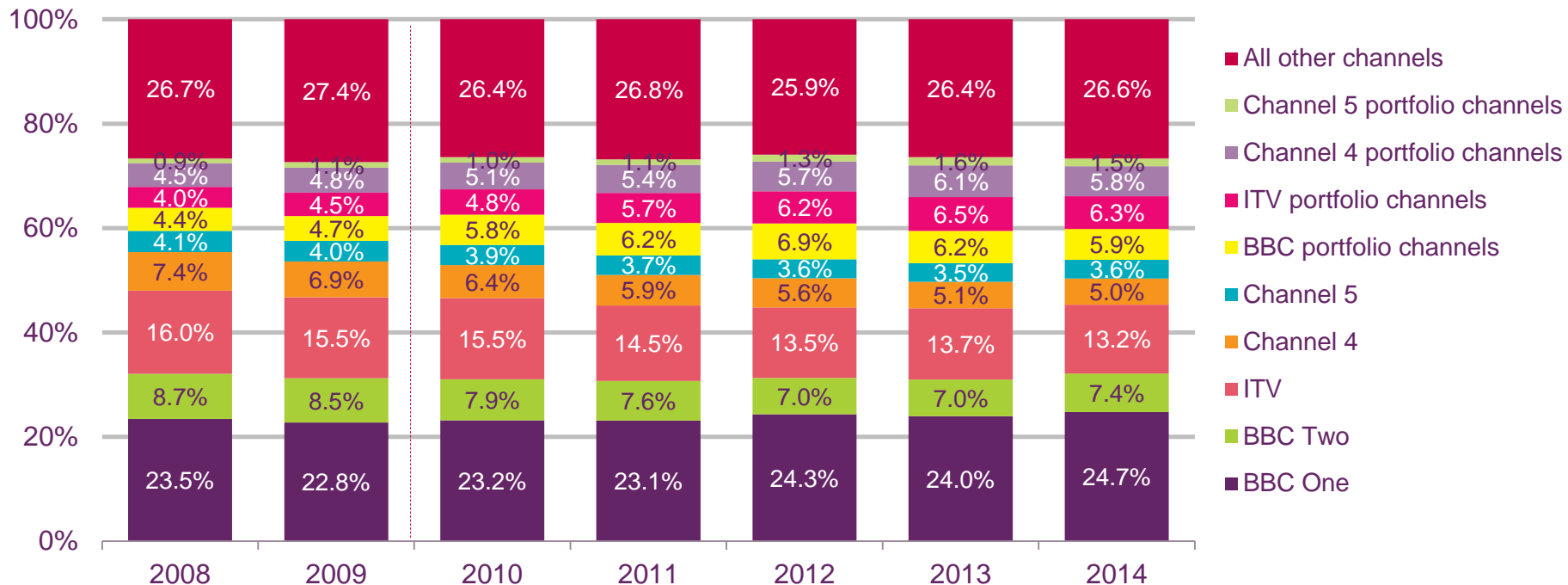


Source: BARB, network

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

As seen among all individuals, ABC1 individuals' share of viewing to BBC One and BBC Two increased as ITV's share fell...

Share of viewing/day by channel group: total TV, ABC1 individuals

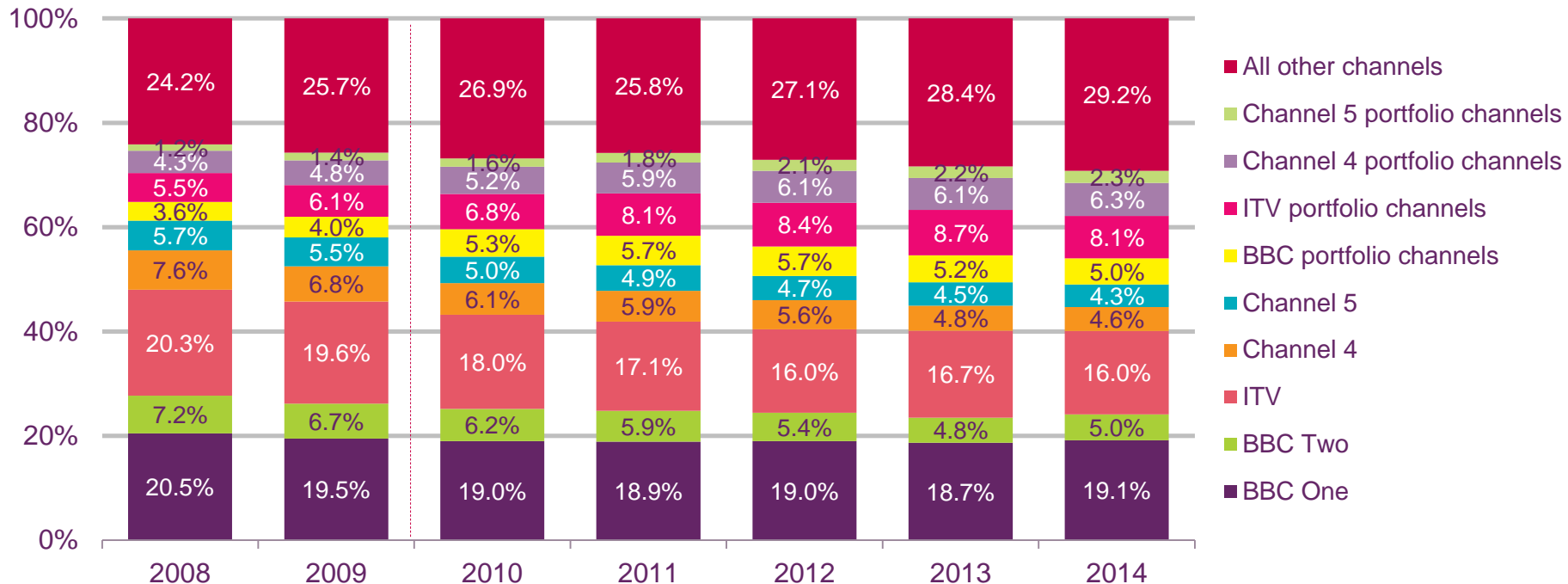


Source: BARB, network

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

...and a similar picture is observed among C2DE individuals.

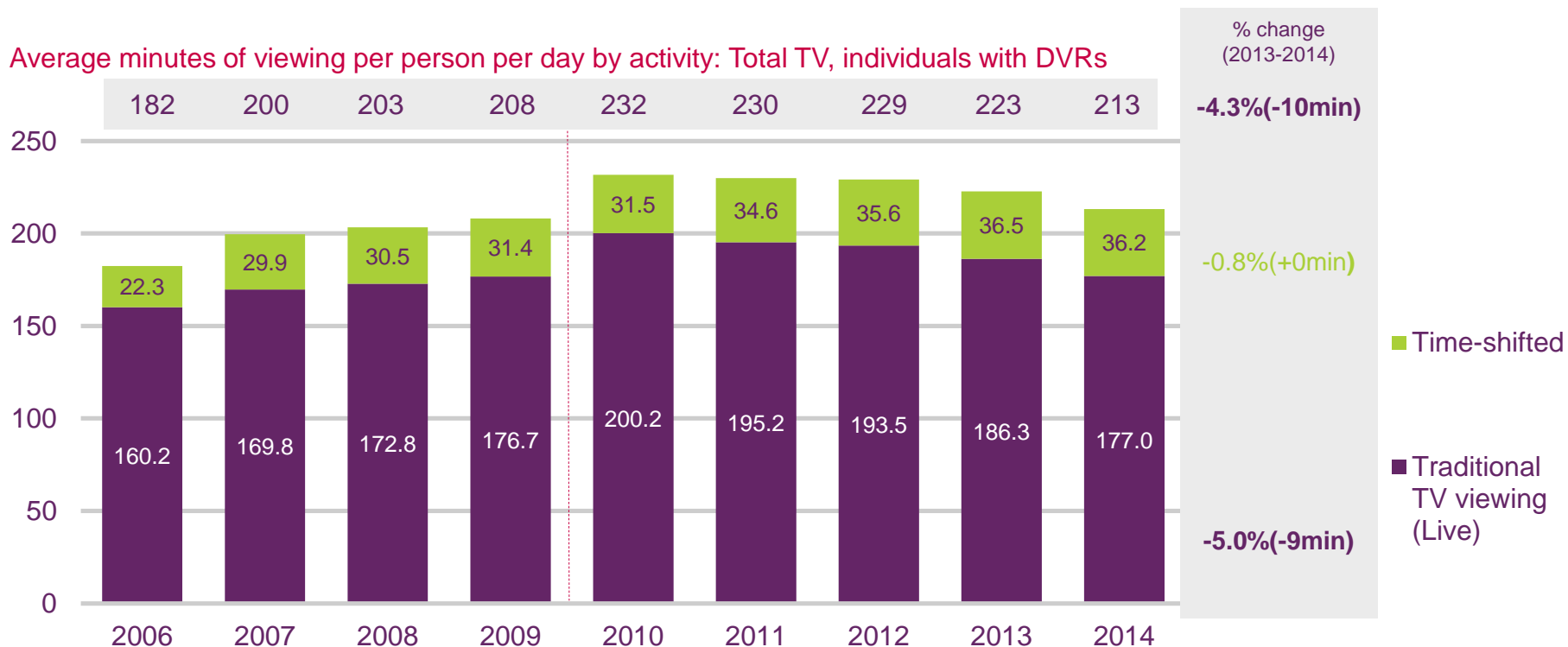
Share of viewing/day by channel group: total TV, C2DE individuals



Source: BARB, network

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Exploring time-shifted viewing further, among individuals with DVRs, live viewing fell by nine minutes between 2013 and 2014 (below average), while time-shifted viewing dipped for the first time, following annual growth since 2006.

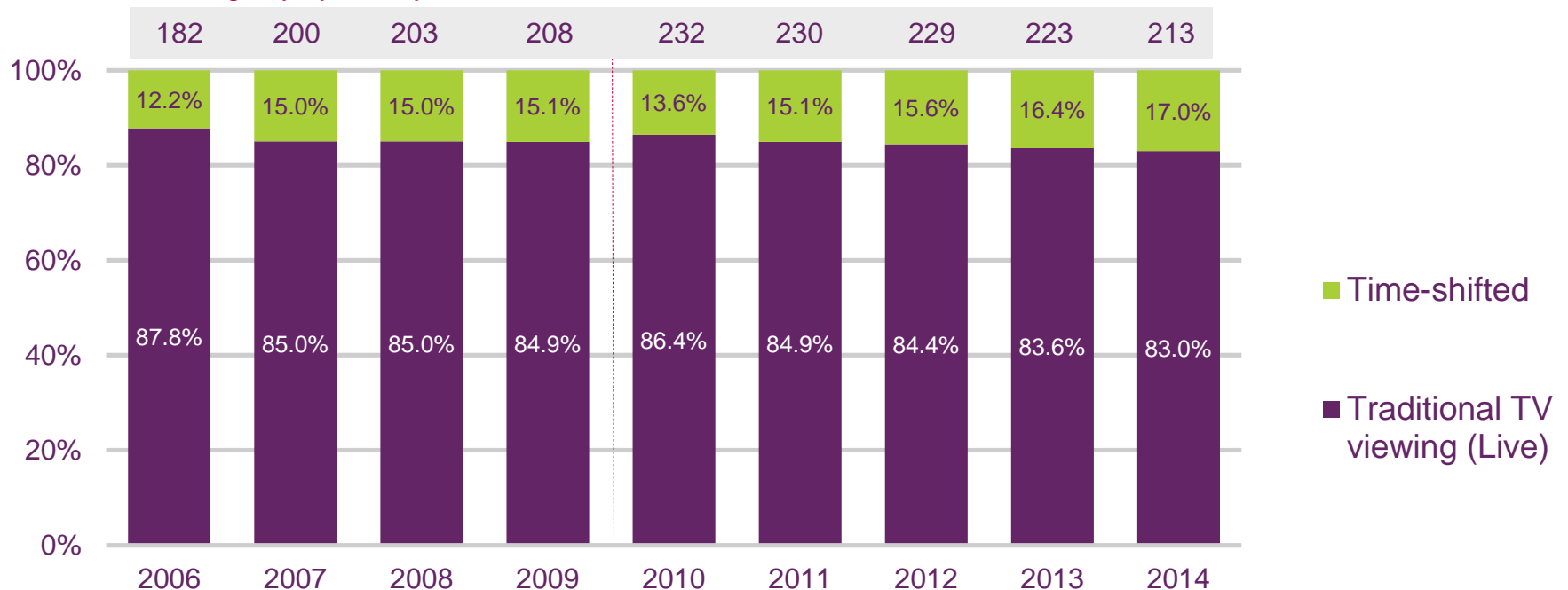


Source: BARB, individuals 4+, **network** – some variation in figures due to rounding

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

But as a proportion of all TV viewing, time-shifted viewing continued to grow, and accounted for 17.0% of all viewing among DVR individuals in 2014 (up from 16.4% in 2013).

Share of viewing/day by activity: total TV, individuals with DVRs

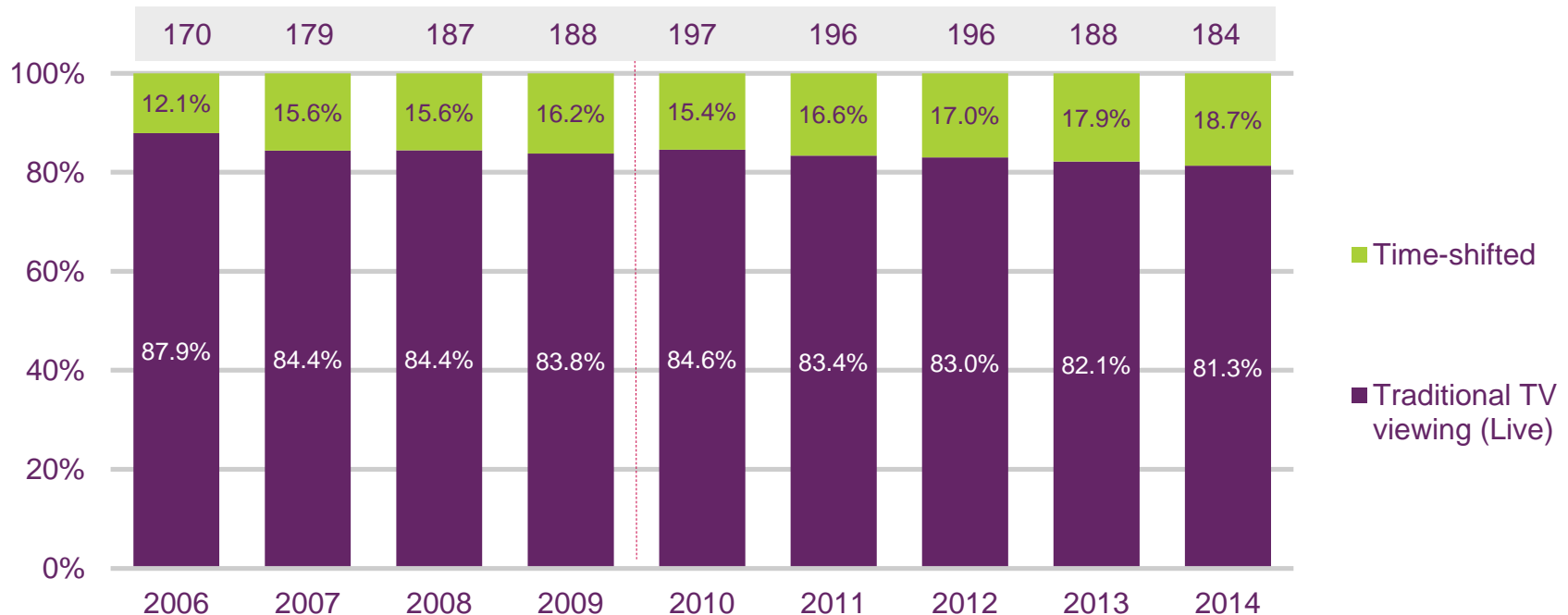


Source: BARB, network – Some variation in figures due to rounding

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Exploring the socio-economic split of DVR owners, time-shifted activity accounted for 18.7% of all viewing among ABC1 viewers with a DVR in 2014, an increase on 2013 and higher than the 17.0% among all DVR individuals.

Share of viewing/day by activity: total TV, ABC1 individuals with DVR

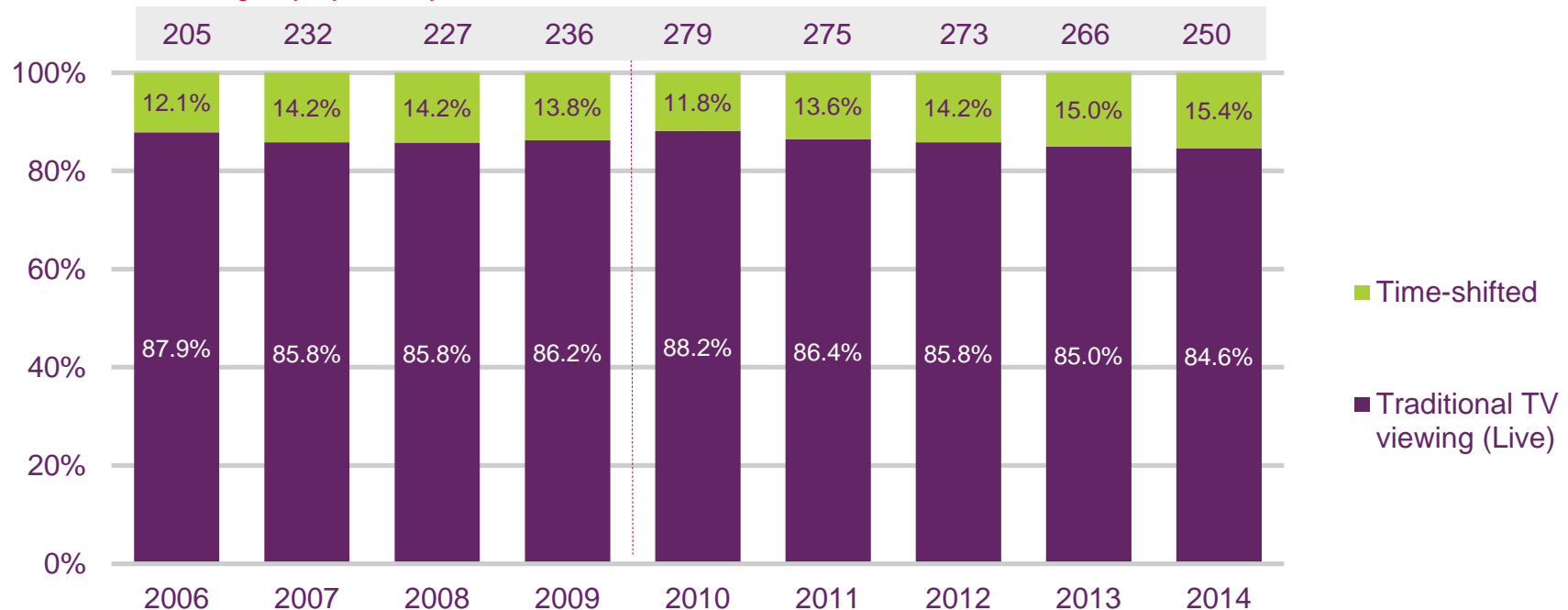


Source: BARB, network – Some variation in figures due to rounding

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Among C2DE viewers with DVRs, the proportion of viewing taking place after the original transmission accounted for 15.4% of viewing in 2014, a similar proportion to 2013 and lower than the ‘all DVR individuals’ average.

Share of viewing/day by activity: Total TV, C2DE individuals with DVR

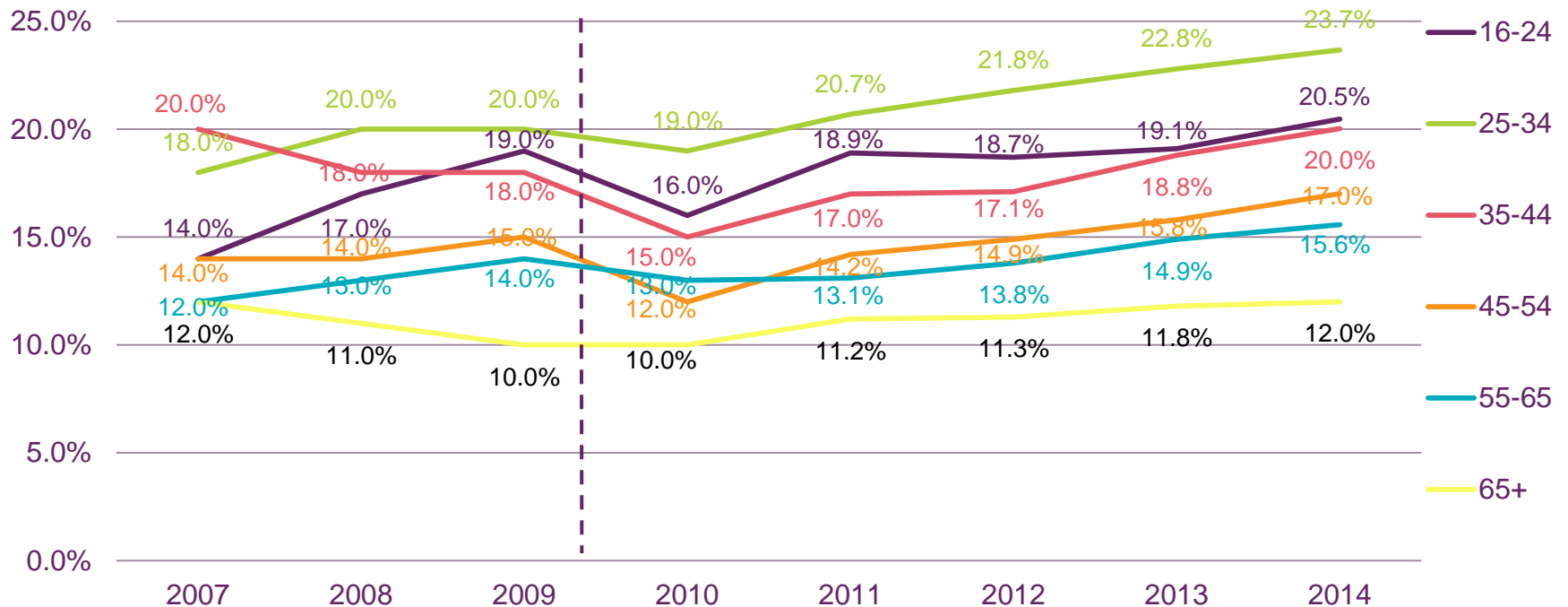


Source: BARB, network – Some variation in figures due to rounding

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

By age, time-shifting is most prevalent among the 25-34 age group, at nearly a quarter of all viewing (23.7% in 2014). Time-shifting increased in each age group between 2013 and 2014.

Proportion of TV viewing that is time-shifted: total TV, individuals with DVR (by age group)

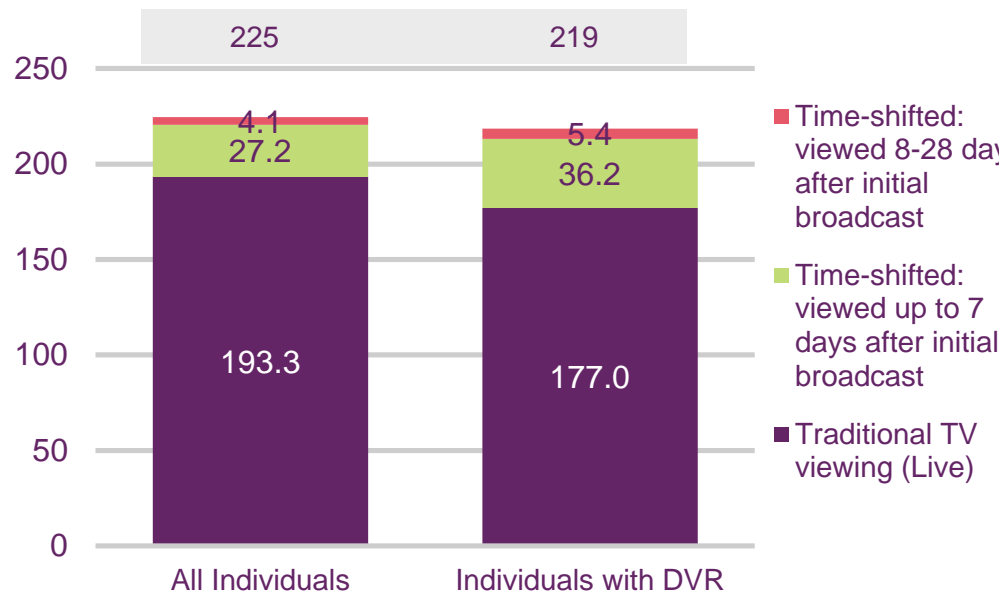


Source: BARB, network. Based on proportion total minutes of viewing up to seven days after broadcast.

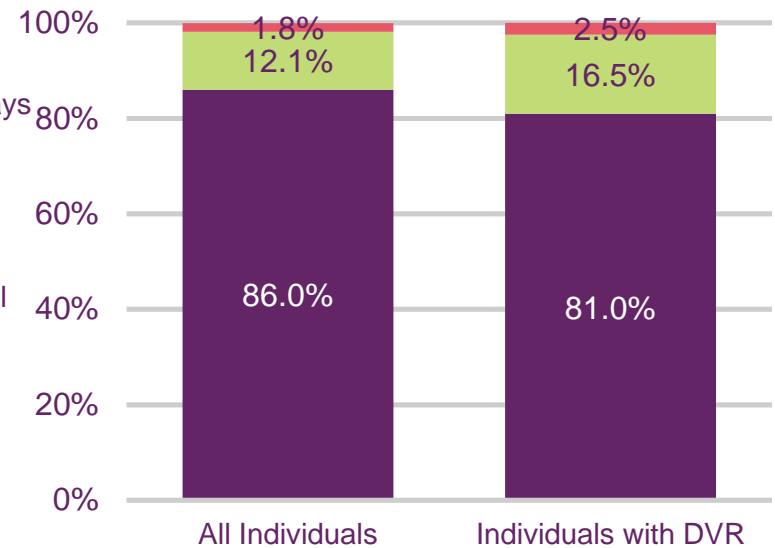
-New BARB panel introduced in 2010. As a result pre- and post-panel change data must be compared with caution (see dotted line).

BARB industry-standard data captures time-shifted viewing up to seven days after traditional live broadcast. Looking at the additional time-shifted viewing 8-28 days after a programme is aired shows a further 4.1 minutes of viewing (1.8%) in 2014. The additional minutes attributed to this viewing were not enough to counteract the overall decline in industry-standard 7 day viewing*.

Average minutes of viewing/day by activity: total TV, 2014



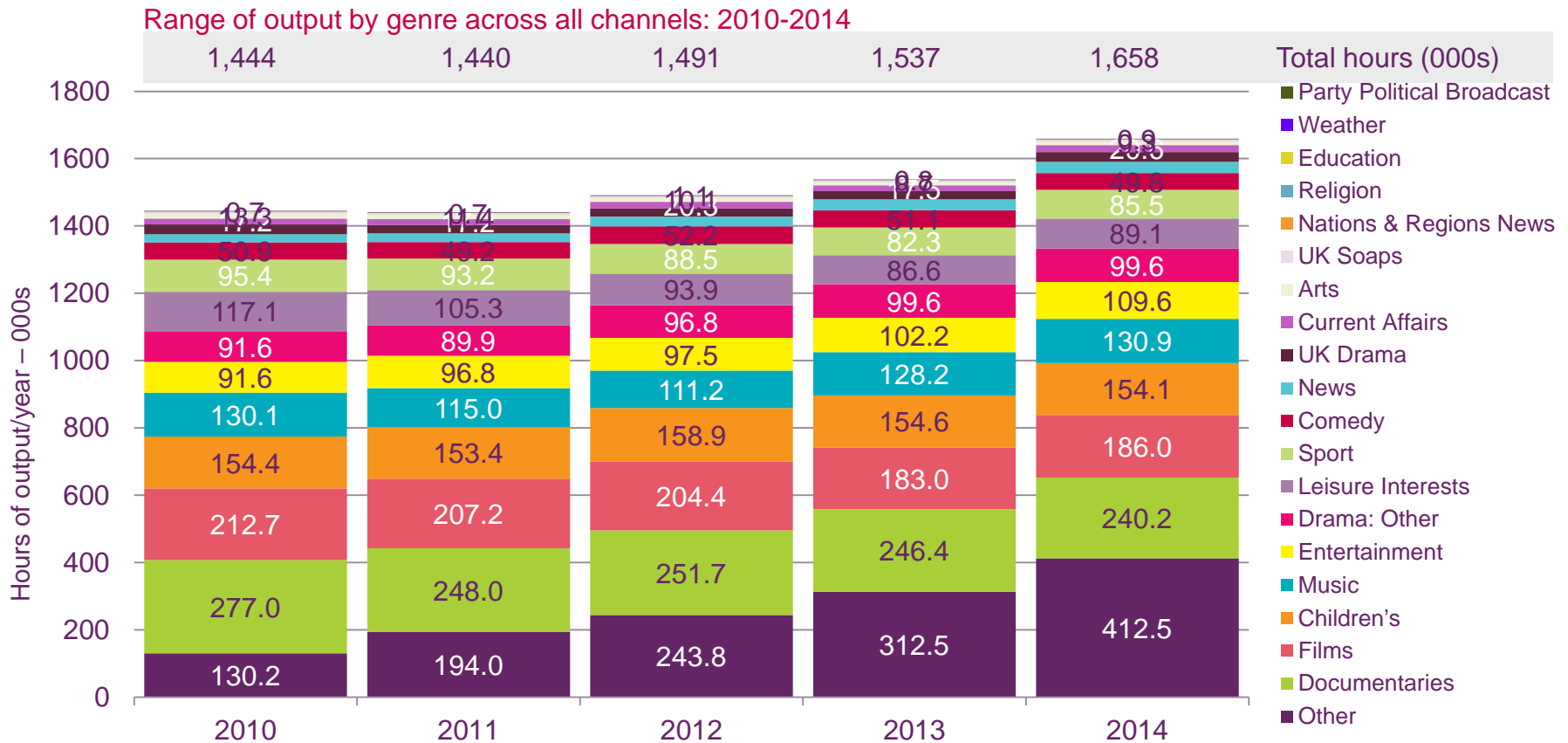
Share of viewing/day by activity: total TV, 2014



Source: BARB, network. Data based on time-shift viewing over 28 days. *Note: 8-28 day reporting of time-shifted viewing was introduced by BARB in July 2013 hence a year-on-year comparison is not possible. 8-28 day time-shifted viewing is not included in BARB gold standard data which remains as 7 days of viewing after broadcast.

Genre analysis

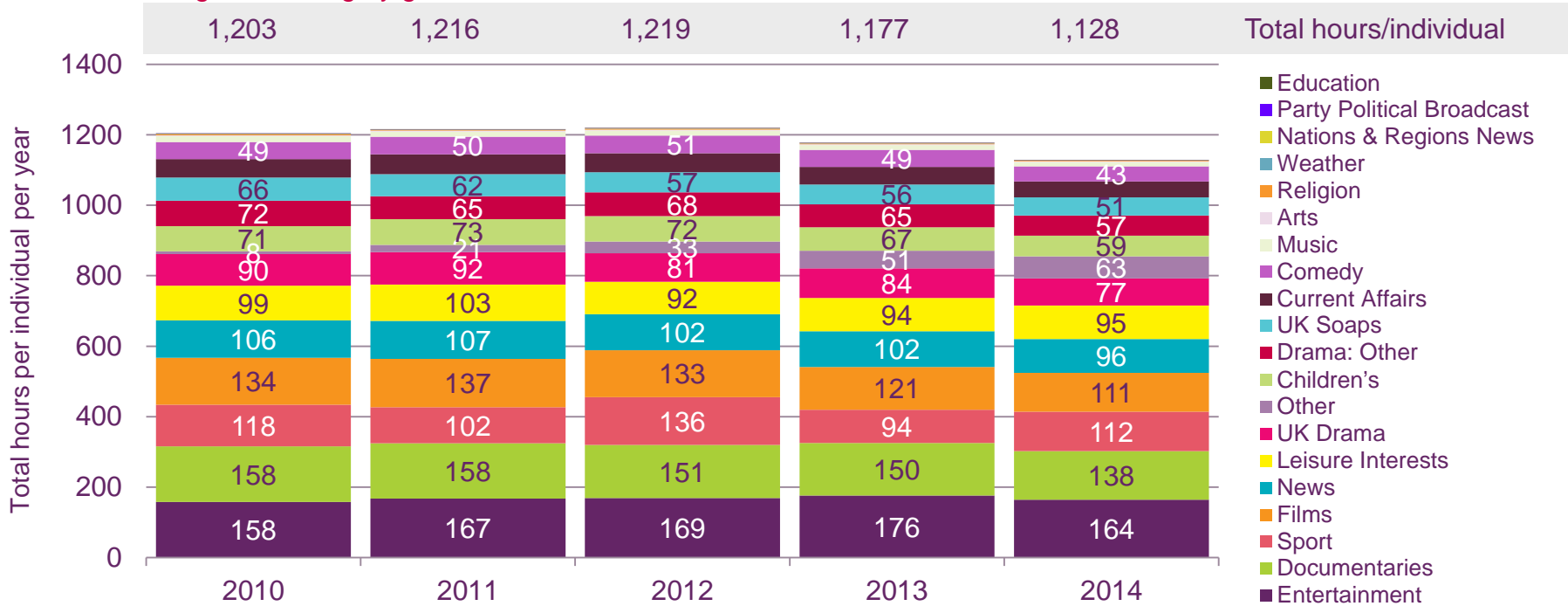
According to BARB, total output hours* of programming increased year on year. This was mainly driven by entertainment, UK drama, music, sport and films.



Source: BARB. 2008-2009: Network Plus/2010+: Network. Network programming based on 4+ area filter. Total TV viewing. **Note:** There have been very large increases in total viewing hours to the 'other: new programme' genre over the last few years. Programmes that fall in other genres may therefore be coded as *other: new programme*. *Output hours and the genre definitions presented from BARB data is different to the output hours and genre groupings collected by Ofcom directly from broadcaster returns.

There was an overall decline in total programme hours of viewing per individual, with some of the biggest year-on-year declines in entertainment, films and drama (non-UK and UK). Most of this programming is associated with on-demand viewing. There was a big uplift in viewing to sport, unsurprising in a World Cup year.

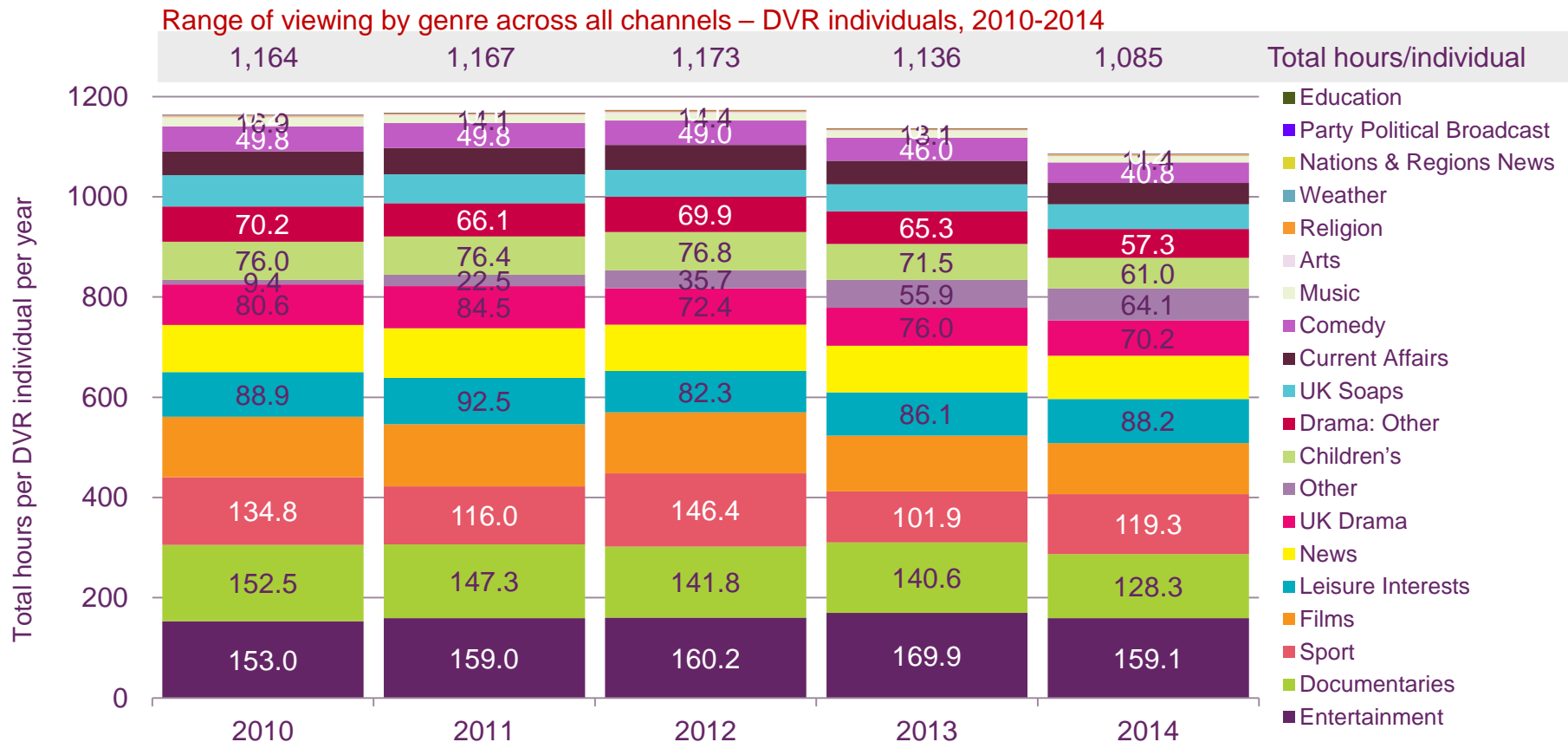
Range of viewing by genre across all channels, all individuals: 2010-2014



Source: BARB, individuals 4+, network programming based on 4+ area filter, total TV. Total hours of viewing/year.

Note: There have been very large increases in total viewing hours to the 'other: new programme' genre over the last few years (from 33.1 hours of viewing per person in 2012 to 62.6 hours in 2014). Programmes that may fall in other genres may therefore be coded as other: new programme and this should be considered in any genre-based analyses.

The overall decline in viewing per person among DVR individuals was slightly more than the average for all people. The documentaries, entertainment, children's and films genres saw the greatest drops.

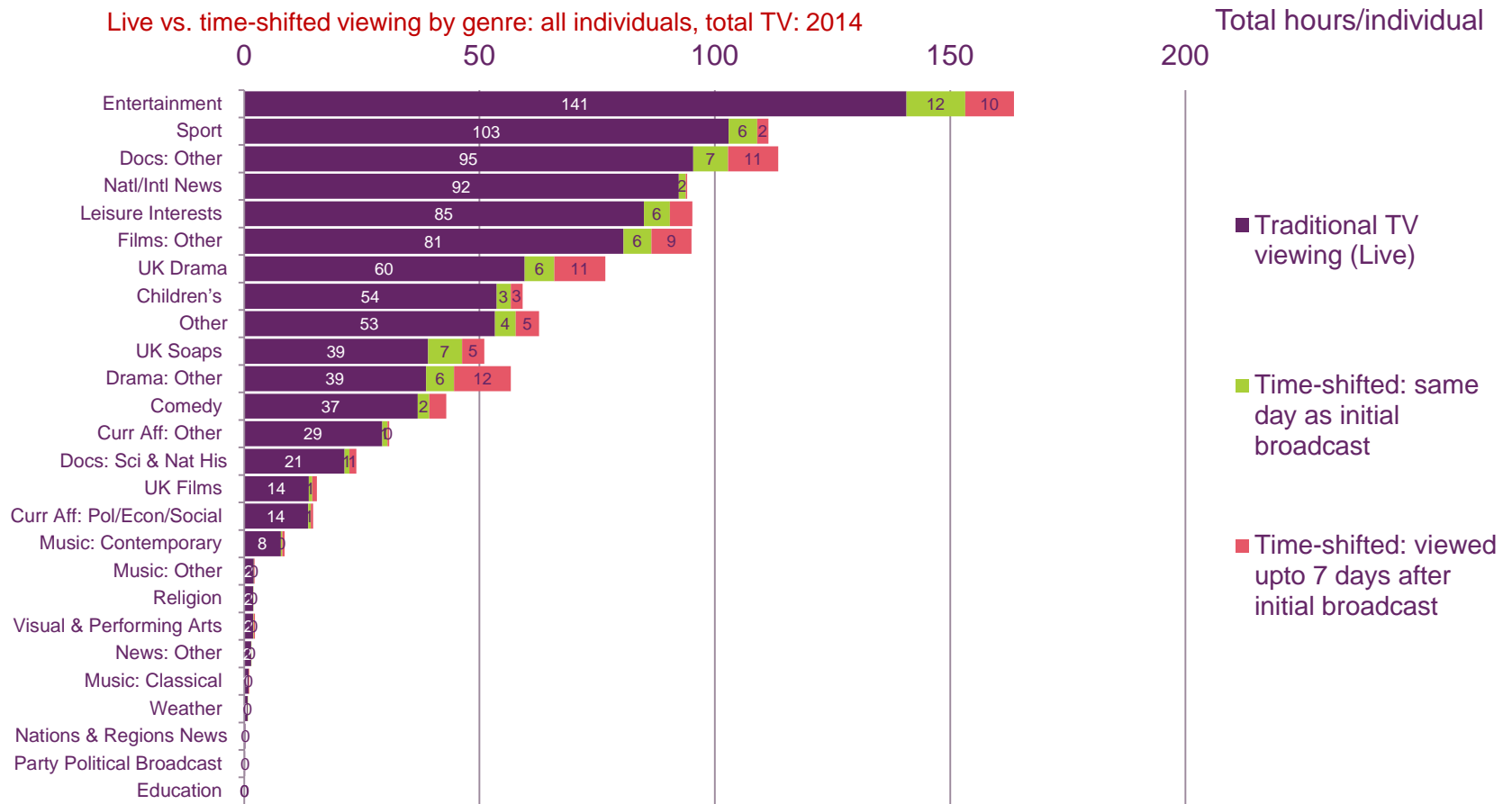


Source: BARB. DVR individuals (4+), 2008-2009: Network Plus/2010+: Network. Network programming based on 4+ area filter. Total TV viewing.

Note: There have been very large increases in total viewing hours to the 'other: new programme' genre over the last few years (from 33.1 hours of viewing per person in 2012 to 62.6 hours in 2014. Programmes that may fall in other genres may therefore be coded as other: new programme and this should be considered in any genre based analyses.

Exploring the split between live and time-shifting viewing by programme genre shows that live viewing continued to be the main way of watching programmes but with reductions in overall live minutes by genre over time. There were general increases in time-shifted minutes across most genres, but this varied widely by genre.

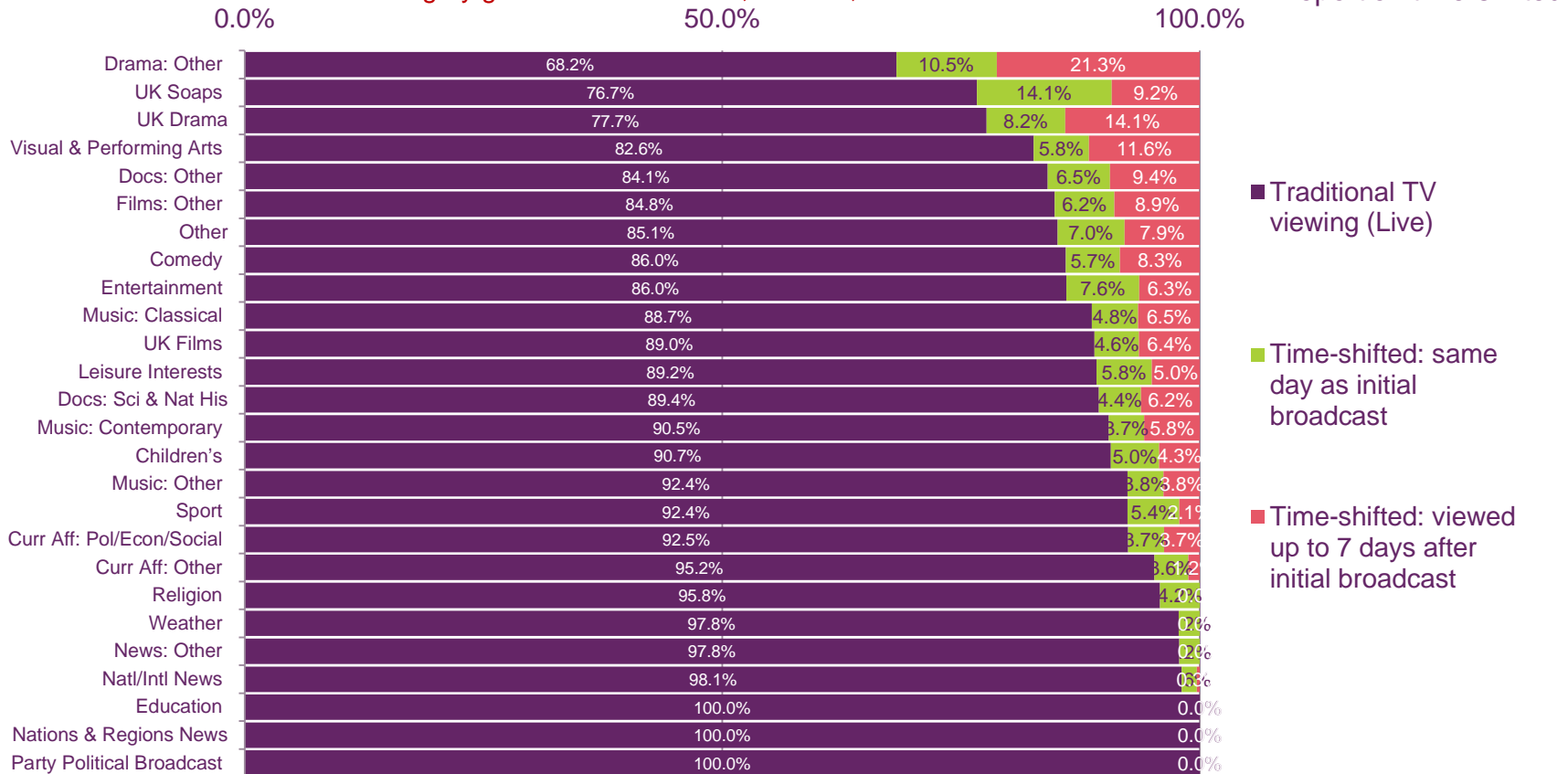
Live vs. time-shifted viewing by genre: all individuals, total TV: 2014



Source: BARB, individuals 4+, network, total TV. network programming based on 4+ area filter. Ranked by live, descending.

As a proportion of total viewing, there were wide variations in time-shifted activity among all individuals in 2014. Time-shifted viewing to drama:other constituted a third of total viewing to the genre, (31.8%) while it accounted for around a fifth for UK soaps (23.3%) and UK drama (22.3%).

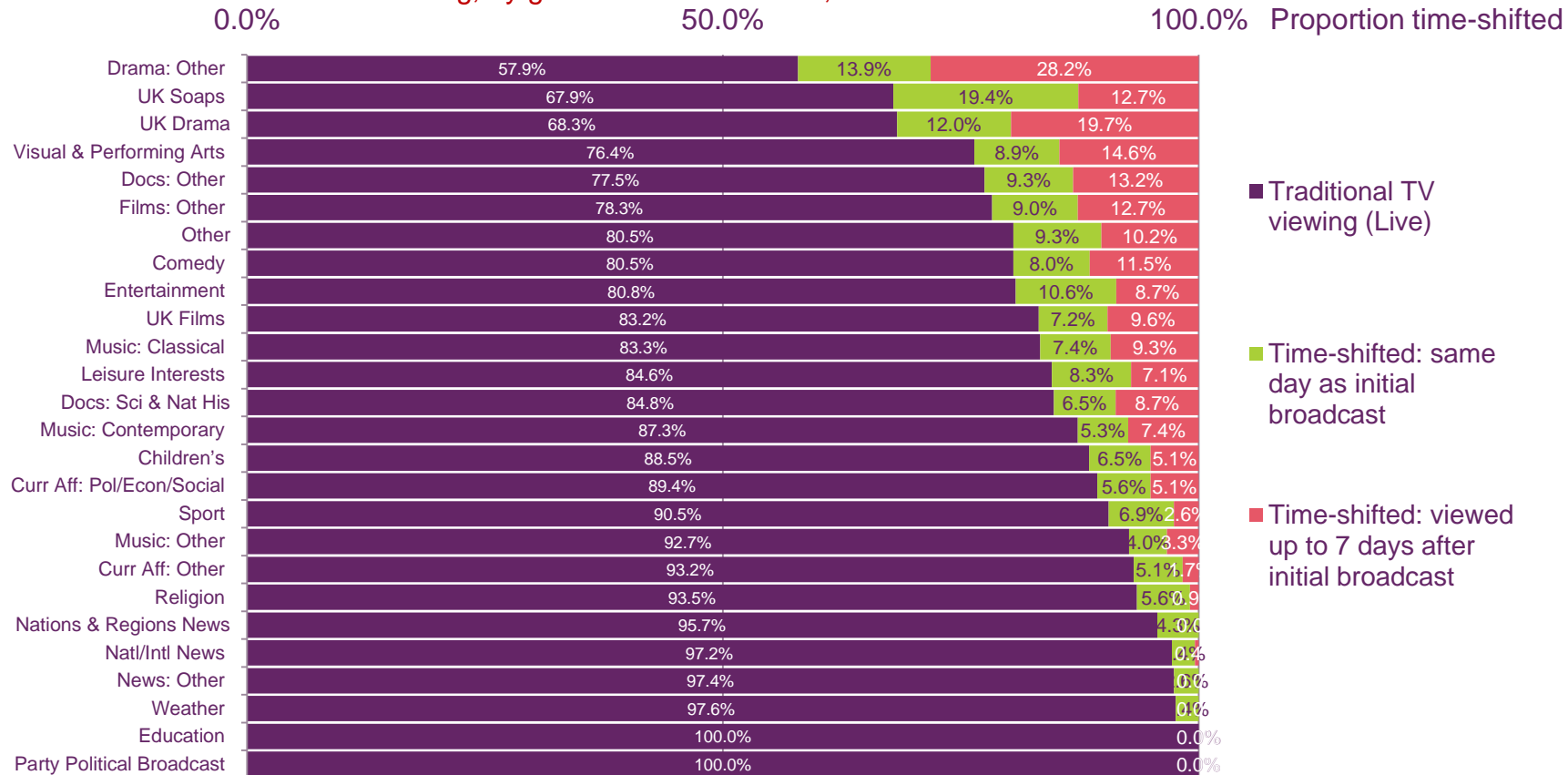
Live vs. time-shifted viewing by genre – All individuals, total TV, 2014



Source: BARB. All individuals, network plus. Network programming based on 4+ area filter. Ranked by time-shifted viewing, descending.

The genres with the highest proportions of time-shifted viewing among DVR owners were drama (non-UK and UK) and UK soaps in 2014.

Live vs. time-shifted viewing, by genre: DVR individuals, total TV: 2014



Source: BARB. All Individuals, network plus. Network programming based on 4+ area filter. Ranked by time-shifted viewing, descending.

TV and non-TV homes and subscription video-on-demand trends

While most homes still have at least one working TV set, the number of households without one has increased slowly over the past decade to 1.7 million (6.0% of all homes) in 2014. The rise has accelerated in the last two years. The number of homes with a TV set has increased steadily over the long term and began to decline in 2010.

Number and % of homes with/without a TV

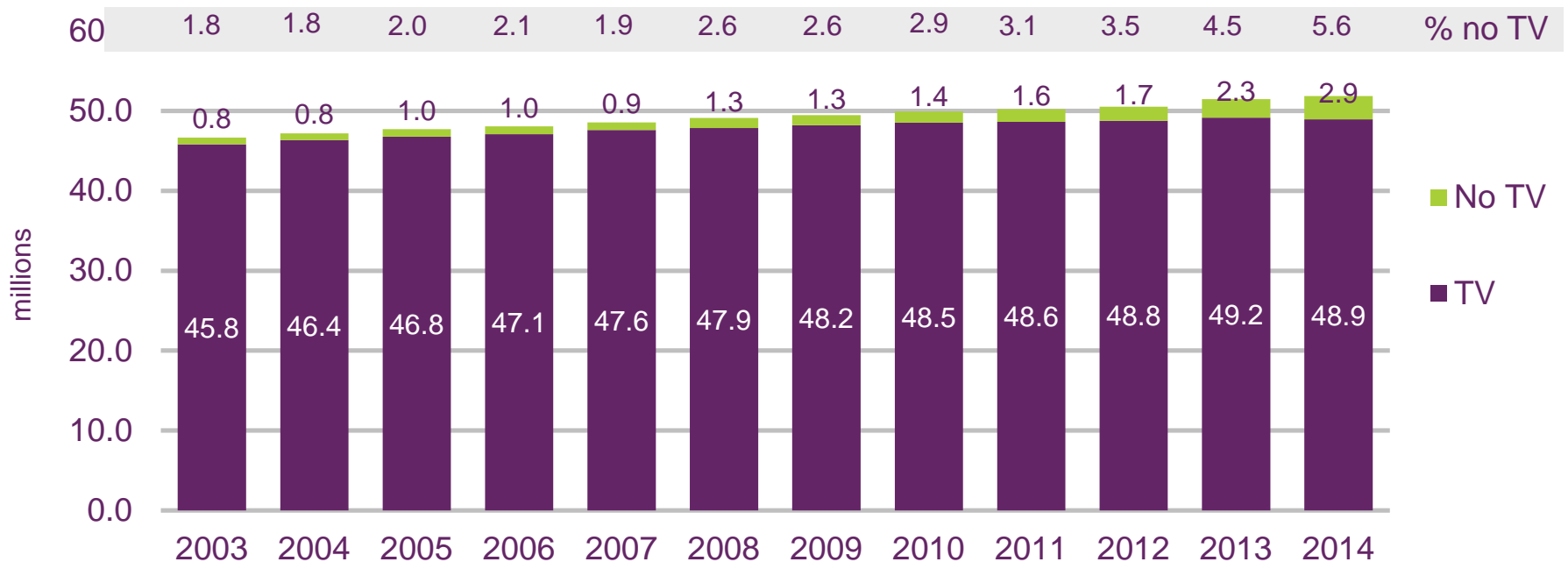


Source: BARB Establishment Survey. Universes are for Q4 in each year.

Based on BARB definition of "working TV set": used for watching TV programmes, used only for playback (DVDs, games consoles) or is only temporarily out of order. In 12Q2 the definition of a 'BARB Working Set' changed to include sets that were only connected to playback devices (DVD players / Games consoles). Previously such non-receiving sets had not been counted as 'BARB Working Sets'.

The number and proportion of adults without a working TV set in the home increased steadily between 2003 and 2012, and grew at a faster rate in 2013 and 2014 (to 5.6% of adults). Consequently, the proportion of TV set owners has fallen gradually, but remains high (94.4% in 2014).

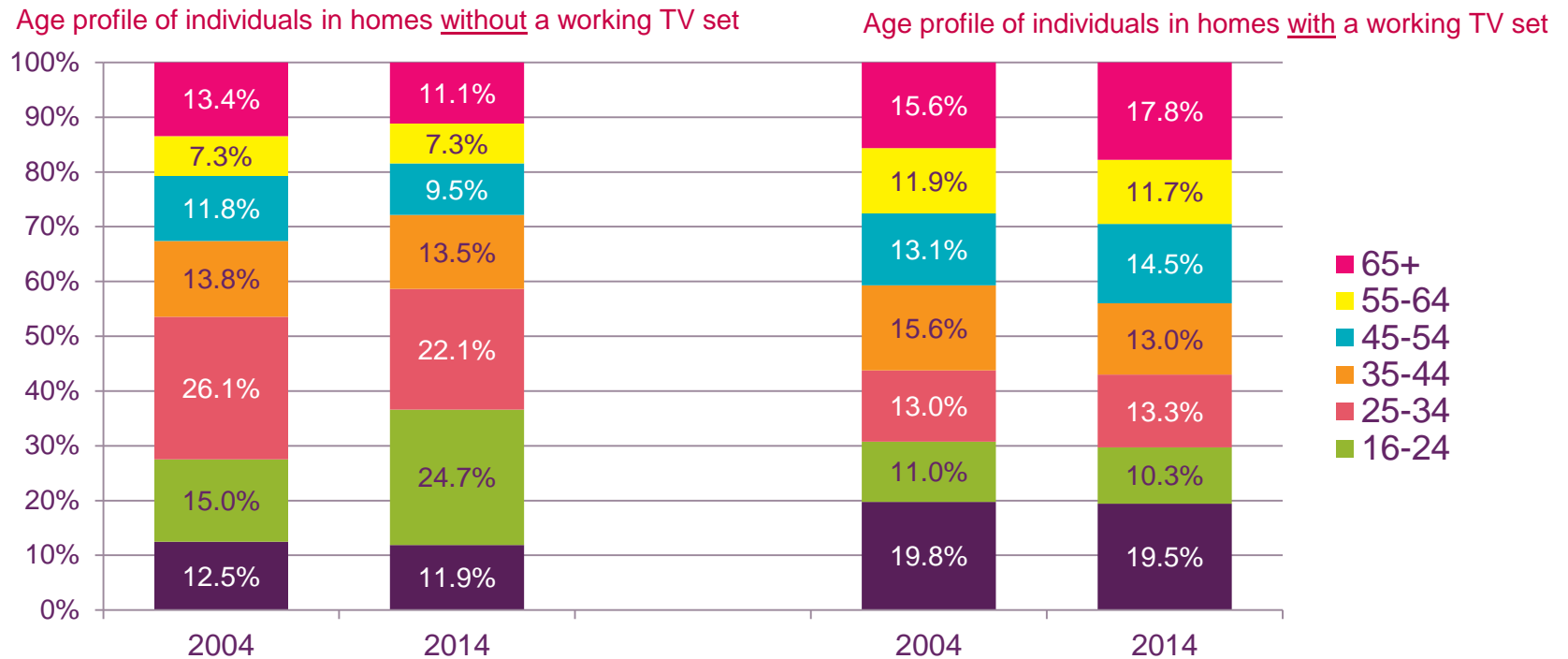
Number and % of adults 16+ with/without a TV in the home



Source: BARB Establishment Survey. Universes are for Q4 in each year.

Based on BARB definition of "working TV set": used for watching TV programmes, used only for playback (DVDs, games consoles) or is only temporarily out of order. In 12Q2 the definition of a 'BARB Working Set' changed to include sets that were only connected to playback devices (DVD players / Games consoles). Previously such non-receiving sets had not been counted as 'BARB Working Sets'.

Although the age profile of TV individuals is unchanged over the past decade, there are shifts in the profile of non-TV set individuals. Under-35s made up an above-average proportion (58.6%) of individuals in non-TV homes in 2014, with 16-34s the largest group overall. Within this, the 16-24 group has shown a marked increase in the past ten years.

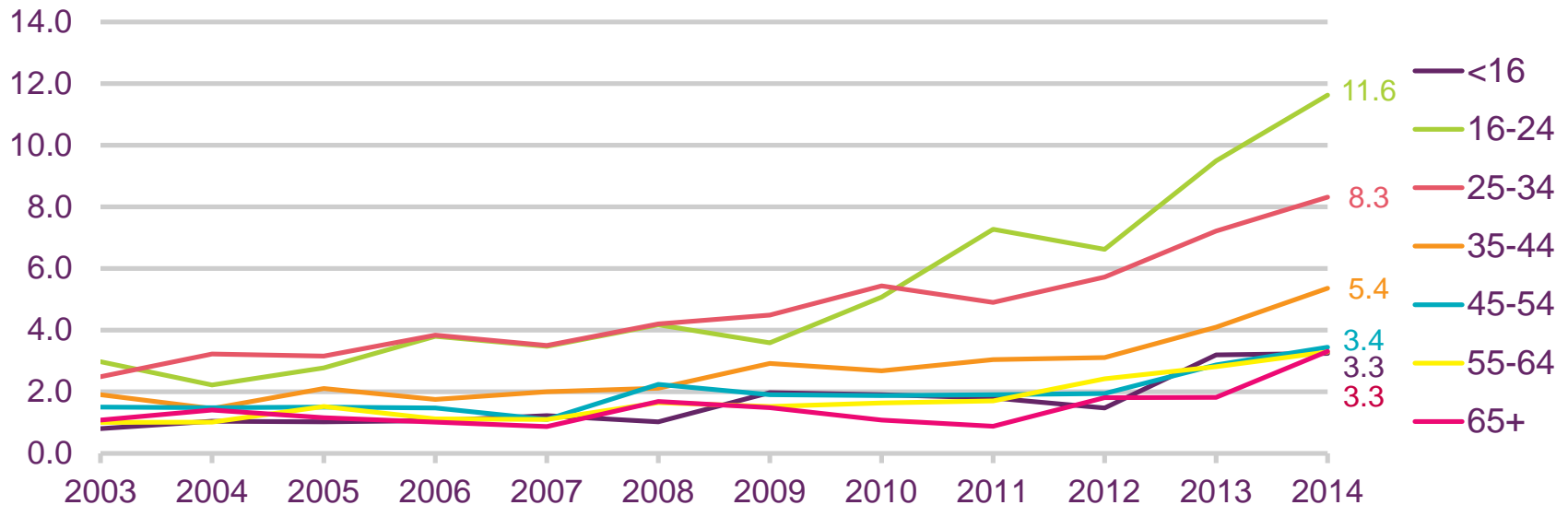


Source: BARB Establishment Survey. Universes are for Q4 in each year.

Based on BARB definition of "working TV set": used for watching TV programmes, used only for playback (DVDs, games consoles) or is only temporarily out of order. In 12Q2 the definition of a 'BARB Working Set' changed to include sets that were only connected to playback devices (DVD players / Games consoles). Previously such non-receiving sets had not been counted as 'BARB Working Sets'.

Looking at each age group individually, younger adults (16-34) are the most likely to be without a working TV set in the home; 11.6% of all 16-24s were in a no-TV-set home in 2014.

% of people without a TV in the home, by age

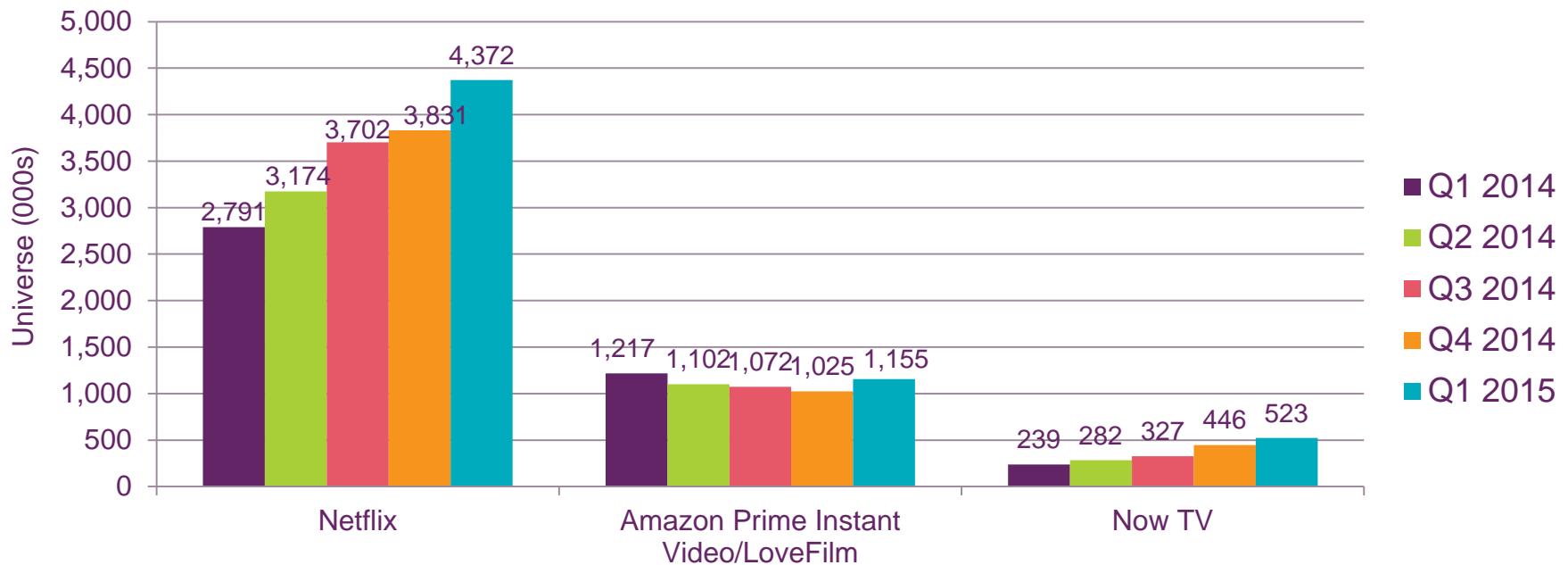


Source: BARB Establishment Survey. Universes are for Q4 in each year. Percentages are calculated from the total universe for each age group. Based on BARB definition of “working TV set”: used for watching TV programmes, used only for playback (DVDs, games consoles) or is only temporarily out of order. In 12Q2 the definition of a 'BARB Working Set' changed to include sets that were only connected to playback devices (DVD players / Games consoles). Previously such non-receiving sets had not been counted as 'BARB Working Sets'.

Netflix launched in 2012, and by Q1 2015 16% of households had a subscription, up from 10% in Q1 2014. Just over a million had Amazon Prime Instant Video and around half a million had Now TV.

Subscription video-on-demand (VOD) service take-up (HH)

10% 12% 14% 14% 16% 4% 4% 4% 4% 4% 1% 1% 1% 1% 2% Proportion of all HH

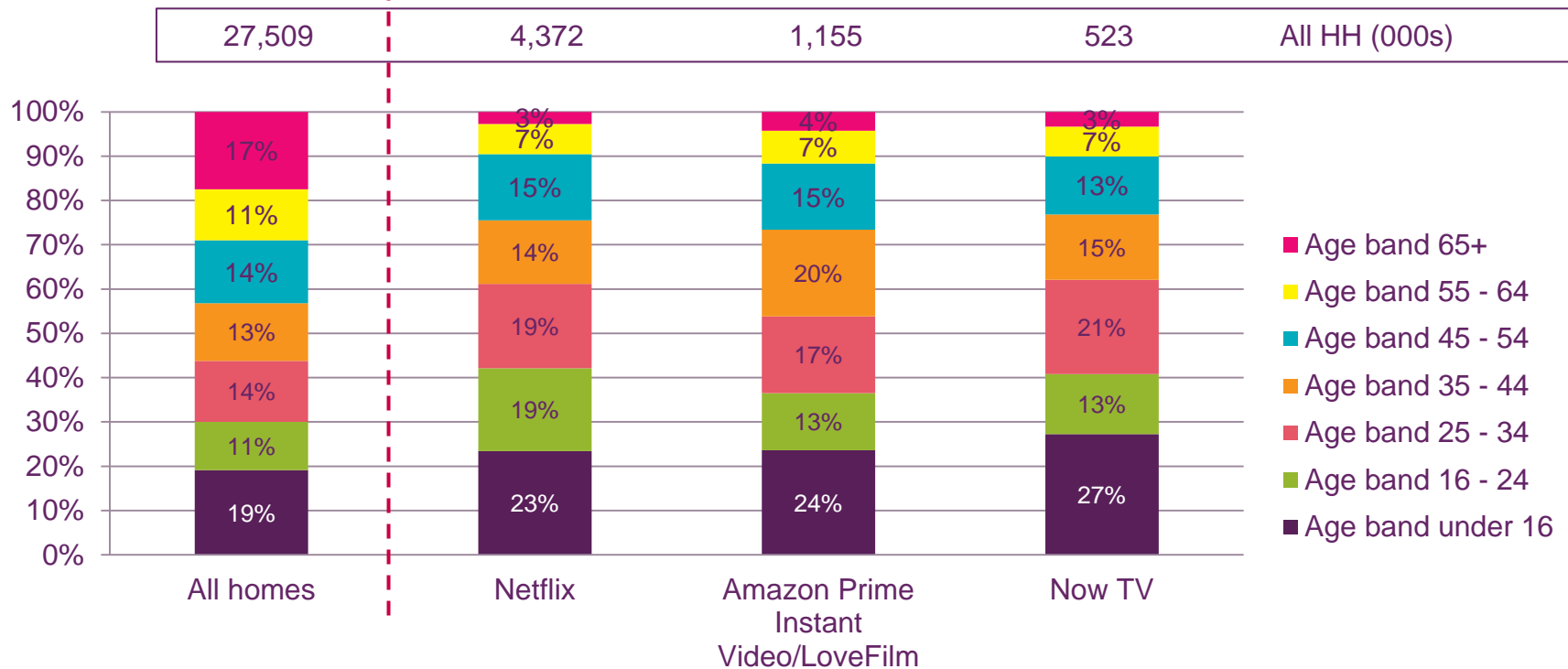


Source: BARB Establishment Survey Q1 2014 – Q1 2015

Q – Do you or anyone in your household, subscribe to any of the following...? (LoveFilm/Amazon Prime Instant Video; Netflix; NowTV) . Note: subscription numbers potentially may include households currently on free trials. There may be overlaps in each type of subscription home

The age profile of individuals in subscription VOD homes is younger than in all homes, with over half below the age of 35. Netflix homes had the highest under-35 profile of all the subscriber groups.

Age profile of homes with SVOD service take-up

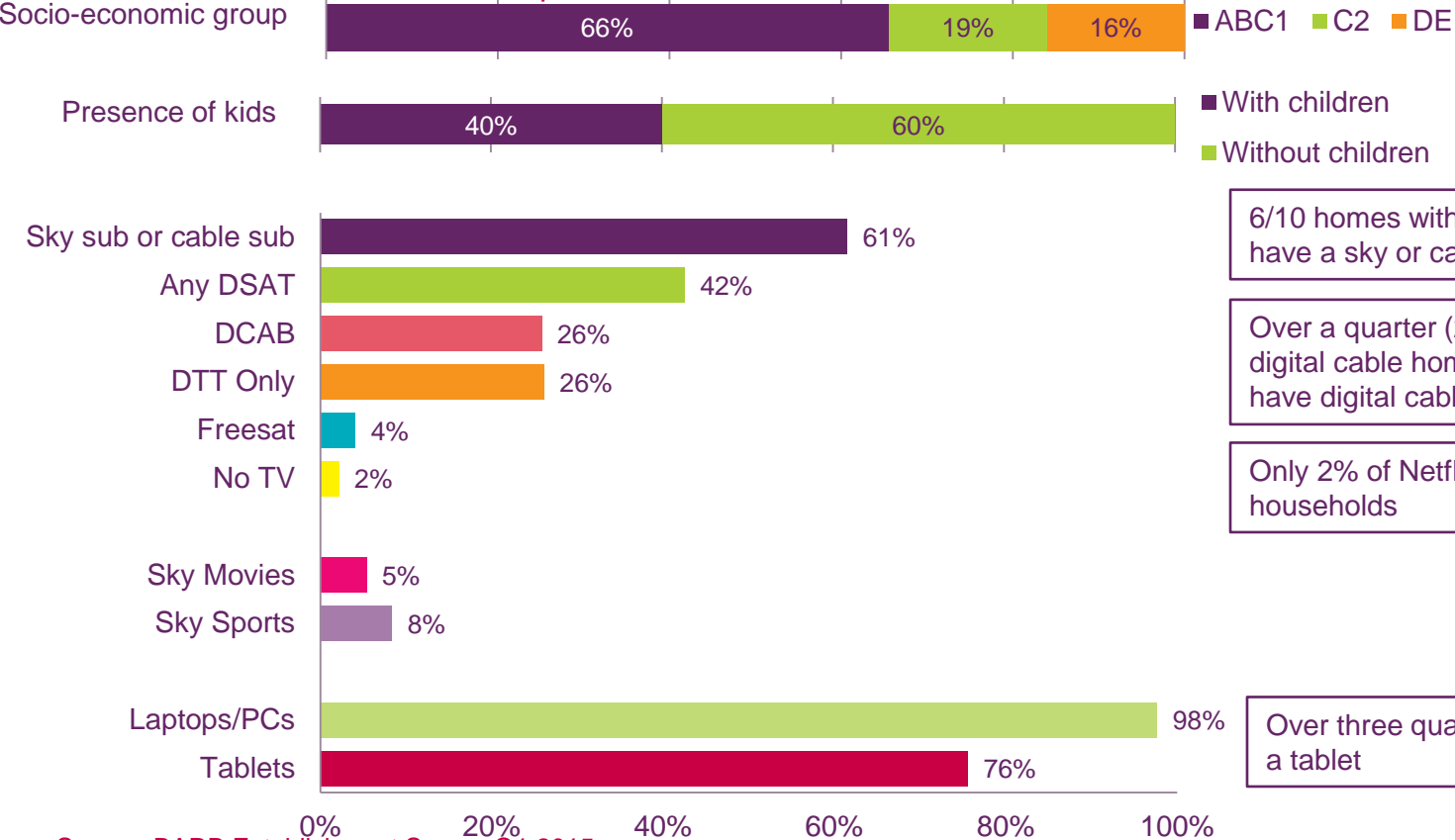


Source: BARB Establishment Survey Q1 2015

Q – Do you or anyone in your household, subscribe to any of the following...? (LoveFilm/Amazon Prime Instant Video; Netflix; NowTV). Note: subscription numbers potentially may include households currently on free trials.

Netflix homes are predominantly ABC1, 61% have pay TV (a Sky or cable subscription) while 27% have a digital terrestrial-only service, 76% have a tablet and just 2% do not own a working TV set.

Profile of homes with a Netflix subscription



Around two thirds of Netflix homes are ABC1

6/10 of Netflix homes do not have children in the household

6/10 homes with a Netflix subscription also have a sky or cable subscription.

Over a quarter (26%) of Netflix homes are digital cable homes (vs. 15% of all homes that have digital cable)

Only 2% of Netflix homes are no TV households

Over three quarters of Netflix homes have a tablet

Source: BARB Establishment Survey Q1 2015

Q – Do you or anyone in your household, subscribe to any of the following...? (Netflix). Note: subscription numbers potentially may include households currently on free trials.

Exploration of contributory factors

A number of inter-related factors may have affected broadcast television viewing:

- Recent years have benefited from significant 'event' programming such as the World Cup in 2010, the royal wedding in 2011, Euro 2012 and London 2012. While 2014 featured the World Cup, England's early departure from the tournament meant that there were fewer high-rating matches.
- The warmer, drier weather in 2014 may have had an impact on leisure activities including reduced viewing levels. Analysis shows warmer months throughout much of 2014, particularly March and April, compared with the same months in 2013. While 2014 was wetter than 2013, September and December 2014 were both much drier than in the previous years.
- Since July 2013 unemployment figures show that relatively higher numbers of adults were out of work between mid-2008 and mid-2013. These figures have been in steady decline in recent quarters possibly affecting the number of people at home and available to watch television.
- BARB has been reporting viewing data for unmatched* viewing and other activities taking place on TV sets not included in industry-standard 7-day viewing estimates**. This includes time-shifted 8-28 day viewing, as well as unmatched viewing using games, DVDs/box sets/archives, SVOD, apps on smart TVs and navigation around EPGs (where there is no in-picture linear broadcast). This allows for the calculation of 7-day gold standard viewing vs. over-7-day and non-Gold Standard viewing on the TV set (this can be referred to as 'total TV screen time').

Note: ***Unmatched** = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing to DVDs/ box sets/archives, SVOD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture linear content. Digital radio stations are excluded (reported by RAJAR). Unmatched viewing has been reported by BARB since July 2013. At the time of writing, it is not possible to analyse unmatched content further by the type of device used. ****Industry gold standard data** = refers to the seven day consolidated data which incorporates traditional TV viewing (live) and time-shifted viewing (viewed up to seven days after the initial broadcast). This is the official estimate of television viewing used in this slide pack.

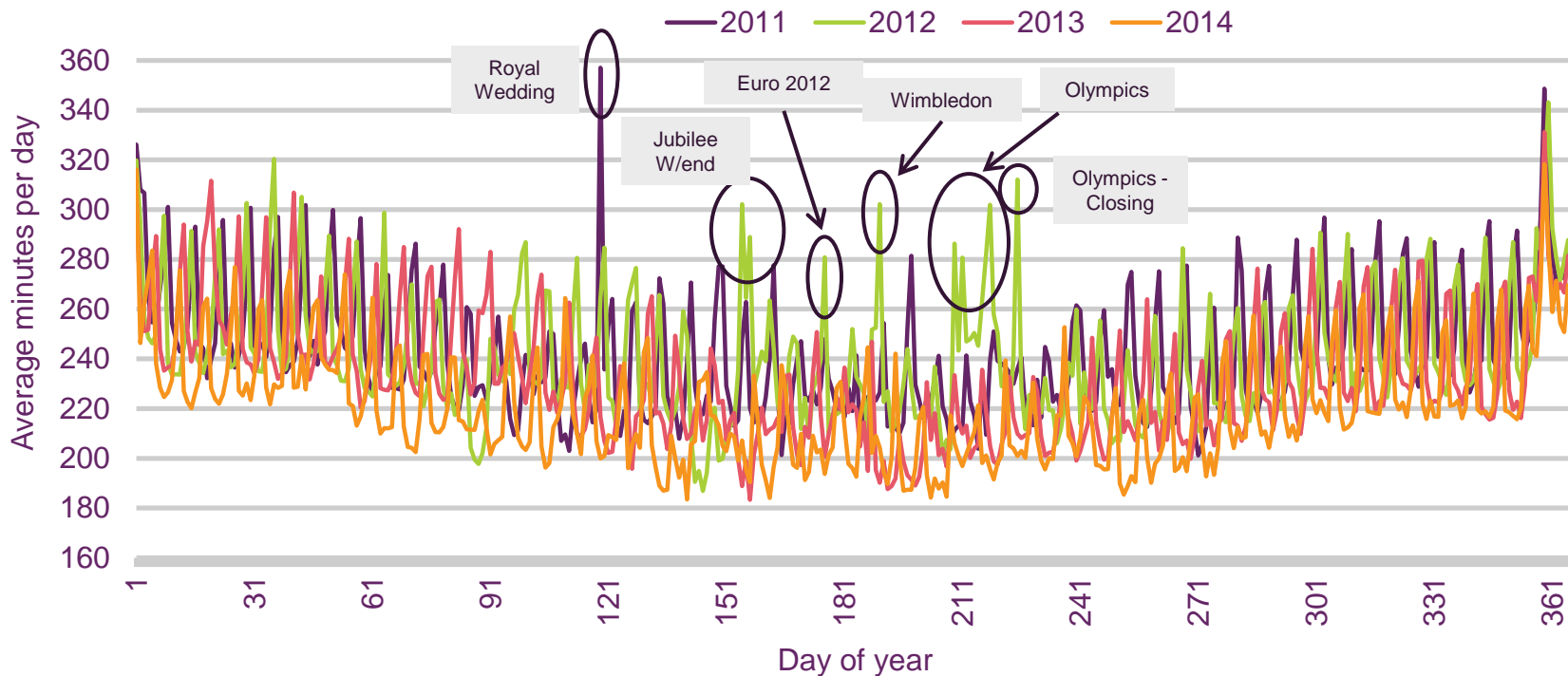
A number of inter-related factors may have affected broadcast television viewing:

- Indicative analysis comparing Q4 2014 to Q4 2013 shows that there was an eight-minute decline in 7-day Gold Standard viewing. There was also a one-minute increase in 8-28 day average daily time-shifted viewing per person (from four minutes to five minutes) and a three-minute increase in unmatched viewing (from 26 to 29 minutes). Taken together, 8-28 day viewing and unmatched viewing combined increased by four minutes. Based on this small case study, 50% (four of the eight minutes' decline) of the fall in viewing minutes (as measured by BARB) appears to be viewing types of content other than broadcast TV, on the TV set (slides 55 and 56).
- The growing popularity in take-up of non-broadcast, on-demand services such as Netflix and Amazon Prime Instant Video, as well as the growth in connectivity and mainstream adoption of smartphones (66% of adults) and tablets (54% of households) is likely to have reduced traditional and broadcast TV-set viewing.
- Measurement could also be a factor. Industry-standard viewing data, reported by BARB, currently captures broadcast TV on the TV set in private homes, up to seven days after a programme being first aired. Other forms of programming and delivery are not presently reported. BARB's ambition is to be able to report viewing on portable devices such as tablets and smartphones, and laptops and computers used to watch TV but not connected to the TV set. This will give a wider indication of consumption across devices and platforms.

Event programming

Recent years have benefited from significant 'event' programming, especially 2011 and 2012, but this does not fully explain the decline between 2013 and 2014.

Average minutes of viewing by day: total TV, individuals 4+, 2011-2013



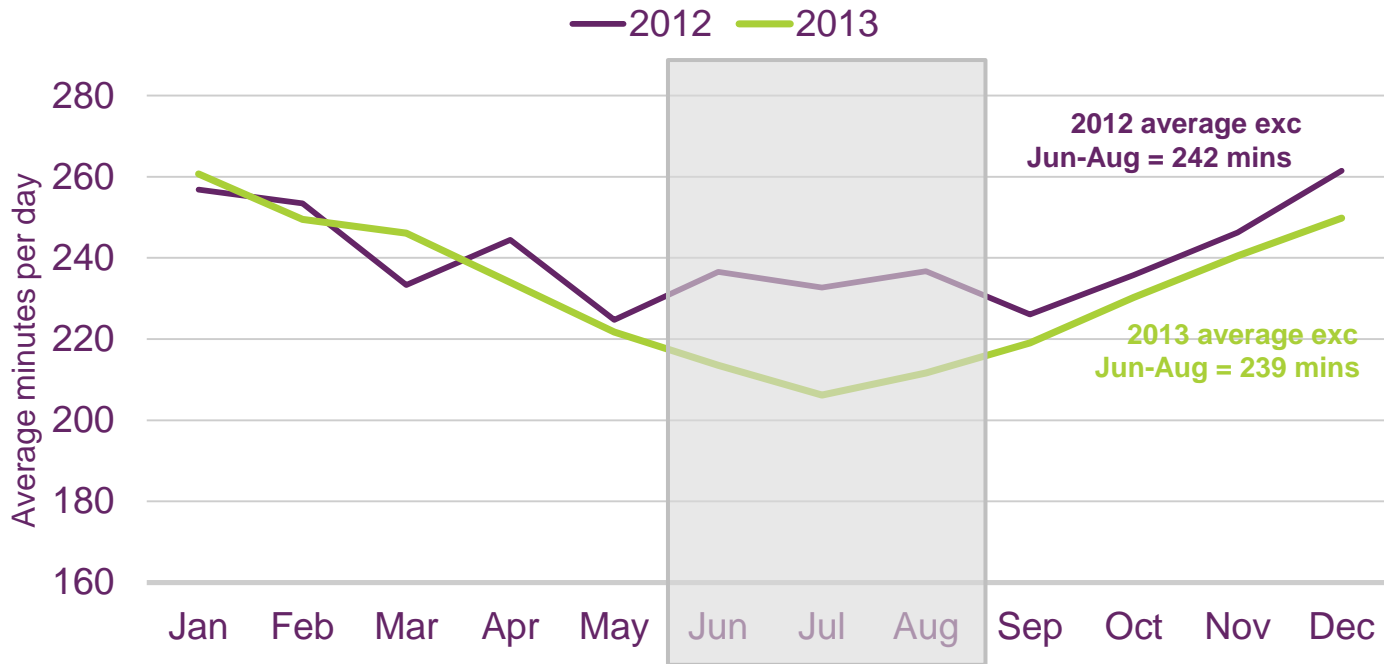
Source: BARB, network

Event programming



‘Significant events’ have a dramatic impact on viewing patterns. If we exclude the summer months (which included the Olympics) from the analysis in 2012 and 2013 we see a less dramatic fall in daily viewing (3 minutes compared to the annual loss of 9 minutes).

Average daily minutes of viewing by month: total TV, individuals 4+, 2012 and 2013



	% change: 2012-2013
Jan-Dec	-3.7%(-9min)
Jan	+1.5%(+4min)
Feb	-1.5%(-4min)
Mar	+5.5%(+13min)
April	-4.3%(-10min)
May	-1.3%(-3min)
Jun	-9.7%(-23min)
Jul	-11.4%(-26min)
Aug	-10.6%(-25min)
Sep	-3.1%(-7min)
Oct	-2.3%(-6min)
Nov	-2.3%(-6min)
Dec	-4.5%(-12min)

Source: BARB, network. Average daily viewing in 2012 = 241mins. 2013 = 232 mins.

- New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution.

The weather

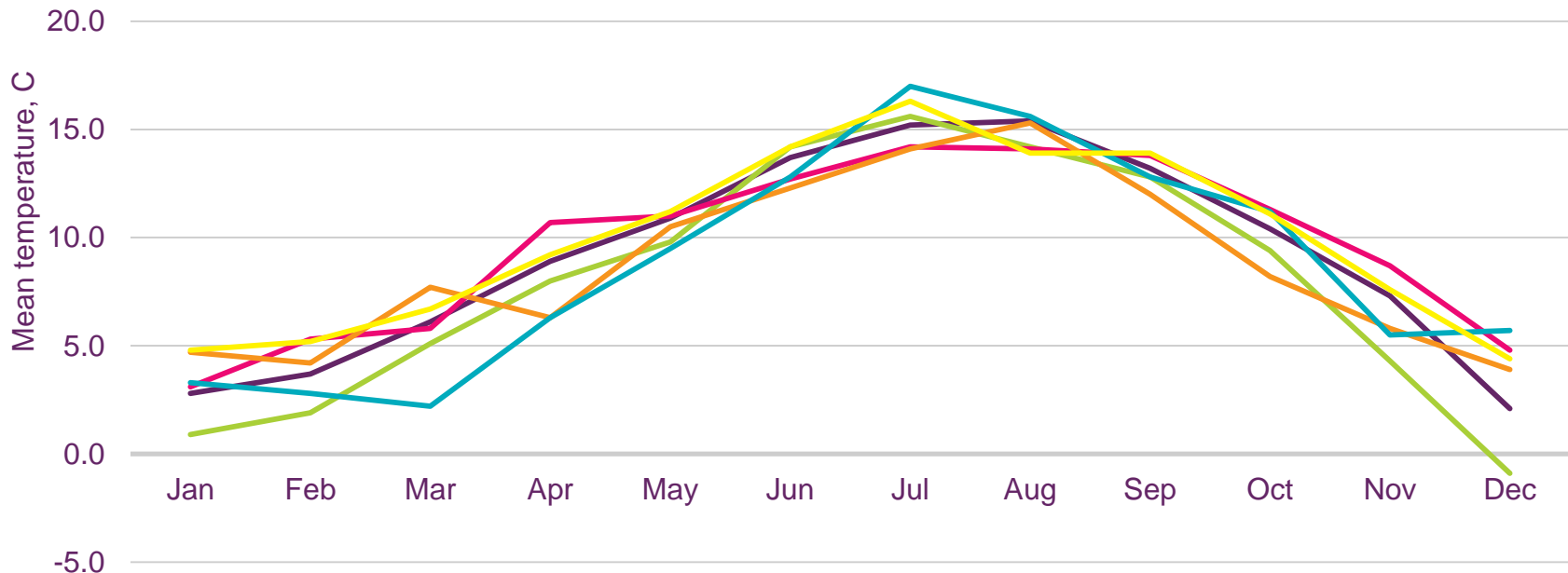
There are seasonal variations in TV viewing; it is generally lower during spring and summer as people spend more time outdoors.



Analysis of trends, looking at mean temperatures by month, shows comparatively warmer temperatures across most months in 2014 compared with 2013. In eight of the 12 months, 2014 temperatures were higher than in previous years.

Mean monthly temperatures: UK average

— 2009 — 2010 — 2011 — 2012 — 2013 — 2014



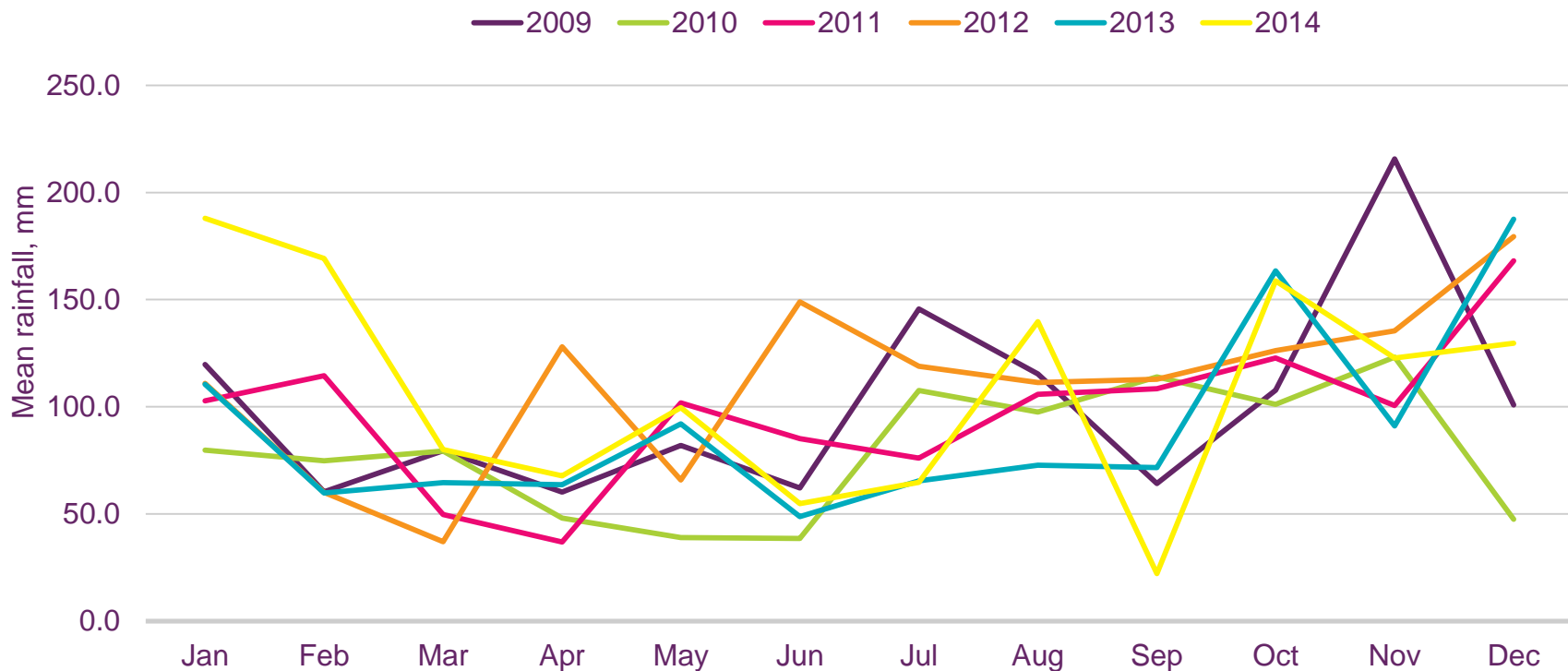
Source: <http://www.metoffice.gov.uk/climate/uk/summaries>

The weather



While January, February and August were particularly wet in 2014, it was generally drier than 2013, particularly during September, potentially encouraging people to spend more time away from the TV set.

Mean monthly rainfall: UK average



Source: <http://www.metoffice.gov.uk/climate/uk/summaries>

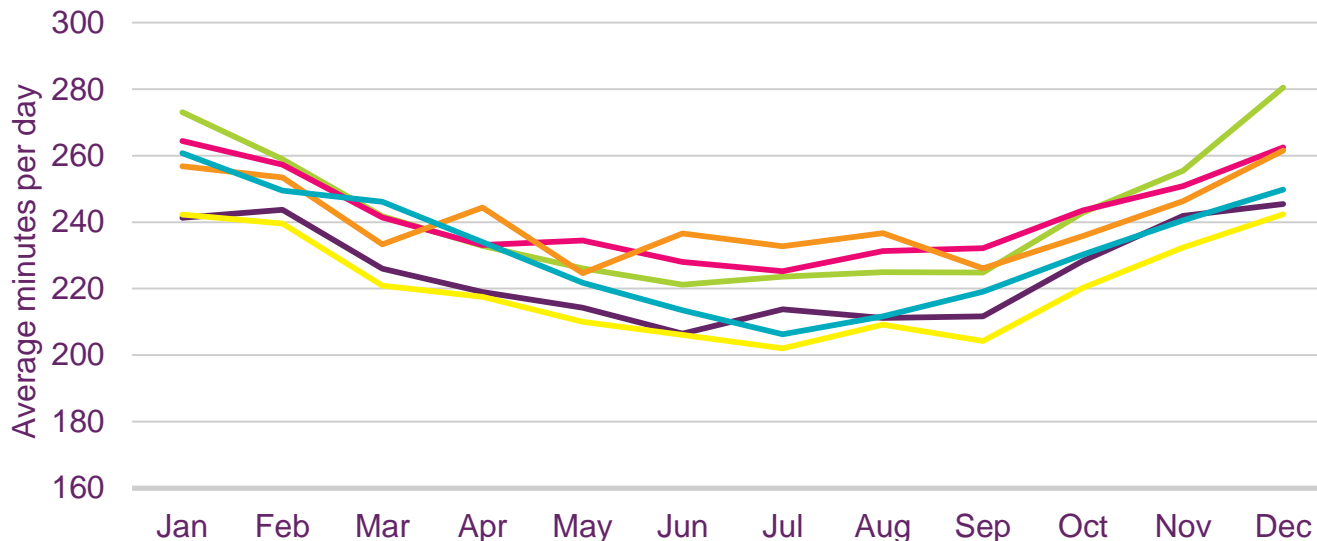
The weather



Considering the warmer, drier 2014 compared to 2013, and looking at average daily viewing by month, 2014 had the lowest month-by-month viewing since 2009: which affected the whole-year 2014 average. There were above-annual-average falls in January, March, April and September 2014 (in bold).

Average minutes of viewing by month: total TV, individuals 4+, 2009-2014

— 2009 — 2010 — 2011 — 2012 — 2013 — 2014



	% change: 2014-2013*
Jan-Dec	-4.9%(-11min)
Jan	-7.1%(-18min)
Feb	-4.0%(-10min)
Mar	-10.3%(-25min)
April	-7.0%(-16min)
May	-5.3%(-12min)
Jun	-3.5%(-7min)
Jul	-2.0%(-4min)
Aug	-1.2%(-3min)
Sep	-6.7%(-15min)
Oct	-4.4%(-10min)
Nov	-3.4%(-8min)
Dec	-3.0%(-7min)

Source: BARB, network. Figures in bold represent above the annual average decline of 11 minutes.

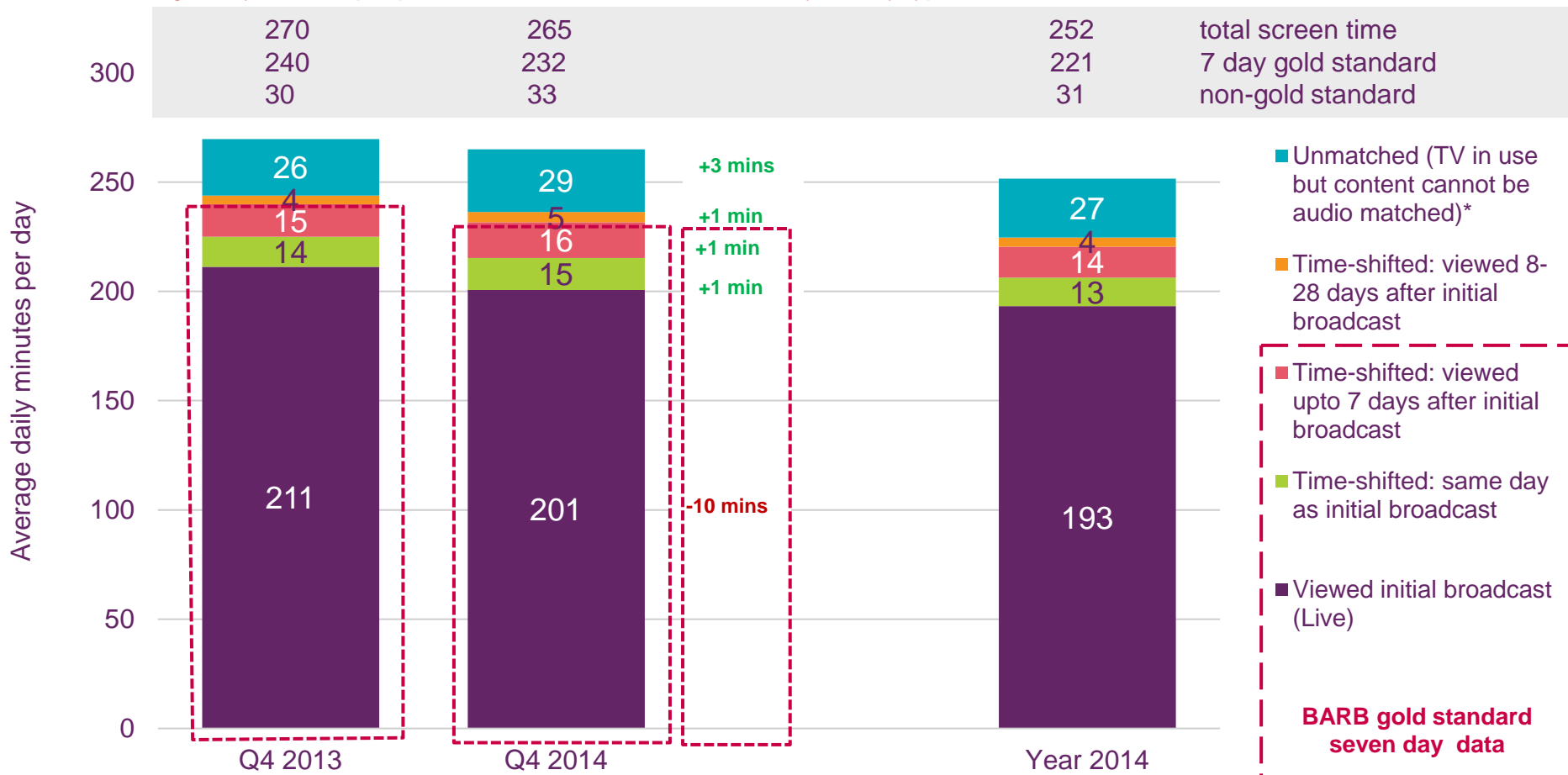
- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Viewing on TV sets other than to gold standard TV

Indicative BARB data suggest that half of the daily viewing minutes lost from Gold Standard 7-day viewing may have shifted to unmatched, unknown content on the TV set.



Average daily minutes per person of TV screen time, total TV : by activity type, Q4 2013 vs. Q4 2014, all individuals



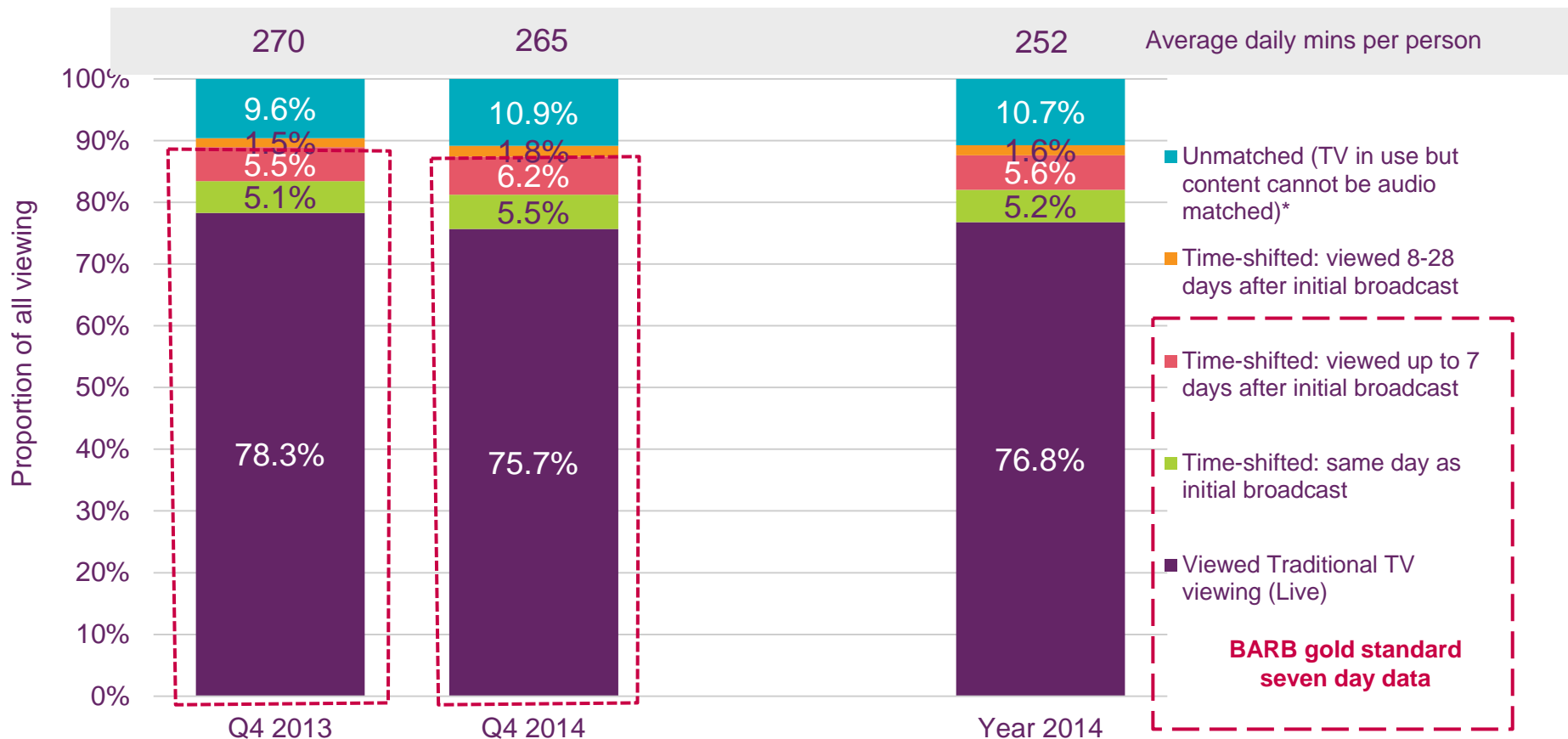
Source: BARB. Average mins per person, Total TV, network. *Note: **Unmatched** = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing to DVDs/Box sets/archives, SVOD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture linear content. Digital radio stations are excluded (reported by RAJAR). Unmatched viewing has been reported by BARB since July 2013. It is currently not possible to break down unmatched content by type of device used (BARB have paused on this development). Values may not appear to sum up to due to rounding.

Viewing on TV sets other than to gold standard TV

Increases in 7-day time-shifted viewing (1.5pp combined) were not enough to stem an overall fall in 7-day Gold Standard viewing. The combined share of non-Gold Standard viewing increased (by 1.5pp), with a bigger increase to unmatched viewing (1.3pp of the 1.55).



Proportion of viewing to all TV screen time by activity type, Q3 2014 vs Q4 2014, all individuals



Source: BARB. Average minutes per person, Total TV, network. **Unmatched** = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing to DVDs/Box sets/archives/SVOD, apps on smart TVs and navigation around EPG guides where there is no in-picture linear content. Digital radio stations are excluded (reported by RAJAR). Unmatched viewing has been reported by BARB since July 2013. It is currently not possible to break down unmatched content by type of device used.

Definitions

Definitions : terminology

Broadcast TV viewing

BARB analysis is based on viewing to scheduled TV programmes such as those listed in TV listings magazines or on electronic programme guides (EPG) on TV sets. 'Broadcast TV viewing' refers to TV programmes watched on the TV set live at the time of broadcast (traditional TV viewing) and recordings of these programmes or viewing of these programmes through catch-up services (referred to as time-shifted) up to seven days after they were televised.

Traditional TV viewing

'Traditional TV viewing' refers to TV programmes watched live at the time of broadcast on the TV set.

Time-shifted viewing

'Time-shifted viewing' is defined by BARB as viewing of programmes recorded and subsequently played back on a television set within seven days of live broadcast, as well as viewing after pausing or rewinding live TV. Recording devices included in BARB analysis include video cassette recorders (VCR); DVD recorders (which store programmes on writable DVDs); digital video recorders (DVRs) which use a hard disk to store programmes chosen from an electronic programme guide, and combination devices (which use a combination of internal hard disk and removable DVDs to store programmes).

Viewing any catch-up TV services through the TV set is also captured if the content has been broadcast live in the last seven days. This includes catch-up services accessed through apps on smart TVs and games consoles, and any viewing on a laptop or personal computer connected to the television set. Viewing outside the seven-day window, viewing catch-up services on devices that are not connected to the TV set, and video on-demand (VOD) services (such as Amazon Instant Video and Netflix) which have not been scheduled on a television channel, are not reported as time-shifted viewing.

Definitions : terminology

BARB Gold Standard

The BARB Gold Standard refers to the consolidated data which incorporates traditional TV viewing (live) and time-shift viewing (viewed up to seven days after the initial broadcast). This is the official estimate of television viewing used in this report. It does not include time-shifted viewing between 8 and 28 days after the initial broadcast, or 'unmatched' viewing.

Unmatched viewing

'Unmatched viewing' refers to activities when the TV set is in use but the content cannot be audio-matched or otherwise identified. This includes the TV being used for gaming, viewing DVDs/ box-sets/ archives, subscription video-on-demand (SVOD), time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture linear content. Digital radio stations are excluded (these are reported by RAJAR). Unmatched viewing has been reported by BARB since July 2013

Definitions: Channel groups

Main five PSB channels	BBC portfolio channels	Commercial PSBs' portfolio channels		
		ITV portfolio channels	Channel 4 portfolio channels	Channel 5 portfolio channels
BBC One	BBC Three	ITV+1	Channel 4+1	Channel 5 +1
BBC Two	BBC Four	ITV2	E4	5*
ITV	BBC HD	ITV2+1	E4+1	5*+1
Channel 4*	BBC News	ITV3	More4	5 USA
Channel 5	BBC Parliament	ITV3+1	More4+1	5 USA+1
	CBeebies	ITV4	Film4	Channel 5+24
	CBBC	ITV4+1	Film4+1	
	BBC Olympics channels	CITV	4Music	
	BBC red button	ITV Encore	4seven	
		ITV Encore+1	Channel 4 Olympics channels	
		ITVBe		
		ITVBe+1		

*Channel 4 data for 2007-2009 includes S4C viewing. Following DSO in Wales in 2010, Channel 4 data from 2010 relates to viewing to Channel 4 only. Channels include HD variants where applicable

Definitions: Genre analysis

Genre label	Definition – BARB genres	Genre label	Definition – BARB genres
UK Drama	Drama: Single Plays – UK Drama: Series/Serials - UK	Comedy	Ent: Situation Comedy – UK Ent: Situation Comedy – US Ent: Situation Comedy - Rest of World Ent: Other Comedy Ent: Comedy Stand Up
UK Soaps	Drama: Soaps - UK		
Drama: Other	Drama: Single Plays - Non-UK Drama: Single Plays – Generic Drama: Soaps - Non-UK Drama: Soaps – Miscellaneous Drama: Series/Serials - Non UK Drama: Series/Serials - Generic		
UK Films	Cinema Films: UK TV Films: UK	Entertainment	Ent: Variety/M.O.R.Music Ent: Variety/Youth Ent: Chat Shows – General Ent: Chat Shows - Audience Participation Ent: Quiz, Panel and Game Shows Ent: Lottery Show/Updates Ent: Animations – Cartoons Ent: Animations – Puppets Ent: Family Shows Ent: Special Events Ent: Reality Ent: Cookery Ent: Bollywood Ent: Generic
Films: Other	Cinema Films: US Cinema Films: Rest of World - Foreign Language Cinema Films: Rest of World - English Language Cinema Films: Bollywood Cinema Films: Generic TV Films: US TV Films: Rest of World - Foreign Language TV Films: Rest of World - English Language TV Films: Bollywood TV Films: Generic Other Films (All)		
		Music: Classical	Music: Classical – General Music: Classical - Documentary
		Music: Contemporary	Music: Contemporary – General Music: Contemporary – Documentary Music: Contemporary – Performance/Live Music: Contemporary – Chart Show or Countdown
		Music: Other	Music: Generic

Unless stated, analysis is based on 'Network' programming as defined by the use of the 'number of areas' filter (4+ areas).

Genres shown in bold represent PSB genres. Some sub-genres have been combined to produce an overall genre figure in our analysis. This includes music, news and films.

Definitions: Genre analysis

Genre label	Definition – BARB genres
Visual & Performing Arts	Arts (All)
National/ International News	News: National/International
Nations & Regions News	News: Regional
News: Other	News: Generic
Weather	Weather: National Weather: Regional
Current Affairs: Political/Economical/Social	Current Affairs: Political/Economical/Social
Current Affairs: Other	Current Affairs: Consumer Affairs Current Affairs: Special Events Current Affairs: Magazine Current Affairs: Generic
Leisure Interests	Hobbies/Leisure (All)
Documentaries: Science & Natural History	Documentaries: Natural History & Nature Documentaries: Science/Medical

Genre label	Definition – BARB genres
Documentaries: Other	Documentaries: Human Interest Documentaries: Factual Drama Documentaries: Factual Entertainment Documentaries: History Documentaries: Crime/Real Life Documentaries: Travel Documentaries: Fly on The Wall Documentaries: Celebrity Documentaries: Generic
Religion	Religious (All)
Sport	Sport (All)
Children's	Children (All)
Party Political Broadcast	Party Political Broadcast (All)
Education	Education (All)
Other	Other: New Programme

Unless stated, analysis is based on 'Network' programming as defined by the use of the 'number of areas' filter (4+ areas). Genres shown in bold represent PSB genres. Some sub-genres have been combined to produce an overall genre figure in our analysis. This includes music, news and films.