THE VIEWING REPORT

Our annual exploration of the UK's viewing habits

MAY 2019

BARB
BROADCASTERS' AUDIENCE RESEARCH BOARD

Objective information is critical for the UK's television and advertising industry. Each year, £7.5 billion is spent by broadcasters and advertisers on the production and distribution of programme and commercial content. BARB provides 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 the use of BVOD services on TV sets, tablets, PCs and smartphones; pre-broadcast and box-set 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

Kelly Cates
Kelly Cates is a sports broadcaster for Sky Sports and BBC Radio 5 Live. She brings to life why 2018 was a year of sporting brilliance for British television.

Emma Moorhead
Emma Moorhead is Head of Activation Planning at Wavemaker. She lifts the lid on how multiple-screen viewing data are changing the way that media agencies plan television.

Becky Marvell
Becky Marvell is Head of Television Strategy for the BBC. She makes the case for why a joint industry standard is so important for broadcasters, platforms and talent alike.

GUEST ESSAYS

NEW INSIGHT

CENTREFOLD - THE TOP TENS OF 2018*

HOW DOES DOVETAIL WORK?

UPDATED INSIGHT

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

HELLO,

Welcome to the 2019 edition of The Viewing Report.

The thread to pick up on in this year's introduction is the need for unduplicated reporting of who's watching what. Broadcasters, advertisers and media agencies want a trusted measure of the number of people watching programmes and commercials on different services across multiple screens.

Trust is imperative to any currency. BARB has been delivering an audience measurement currency throughout the last four decades, and we're pleased to report the industry's trust in what we do shone through during a recent industry-wide consultation.

The consultation focussed on whether we should extend our services to cover online video platforms. Responses from advertisers and agencies vindicated our joint industry approach to providing an apples-with-apples comparison of different viewing audiences. Independence, objectivity and transparency underpin everything we do.

Metrics are a fundamental part of comparability, and the message was plain: advertisers and agencies support the duration-weighted metrics used by the television industry. But comparability isn't just about equivalent metrics. BARB reports audiences to channels and services that have equivalent responsibilities for the way they deliver editorial and commercial content to viewers.

All in all, the consultation revealed strong support for BARB. Yet we have to acknowledge that this support doesn't always mitigate frustration at our speed of delivery.

The good news is that 2018 was a year of delivery for BARB; in September we launched multiple-screen programme ratings. You'll find many examples of these new viewing figures in this report and, on page 24, an at-a-glance guide to the Dovetail Fusion method. Emma Moorhead of Wavemaker considers the impact of these new data in one of our guest essays.

Service development is a constant for BARB and there's more to do. One of this year's priorities is to deliver the next stage of Project Dovetail, which will provide unduplicated reach and time spent viewing across multiple screens.

We also need to address the rise of unidentified viewing on the TV set. The evidence to hand on page 22 shows this is likely to be driven by SVOD services such as Netflix. BARB hasn't yet cracked how to report viewing to services that don't want to be measured; we're getting closer and hope to have more news soon.

The importance of making progress in this space is highlighted by Becky Marvell of the BBC, who writes about the challenges of vying for talent and ideas in a highly-competitive market. It's clear that a standard audience currency is integral to informing creative and business decisions.

And the broadcasters are clearly succeeding. 2018 was a year of particularly big numbers, with high ratings for new dramas like Bodyguard as well as for returning entertainment favourites. Impressive as these viewing figures were, they were overshadowed by ratings for England's run to the World Cup semi-final in Russia. Kelly Cates shares a presenter's perspective on the enduring and vital relationship between sport and television.

I hope you enjoy reading this year's report as much as we've enjoyed putting it together for you.

Justin Sampson
Chief Executive
BARB

MEDIA CONTEXT IS CRUCIAL AND BARB PROVIDES FULL TRANSPARENCY ON THE PROGRAMME ENVIRONMENTS THAT COMMERCIALS ARE SEEN IN

2018: A YEAR OF TELEVISUAL SPORTING BRILLIANCE

A certain Liverpool manager is famously quoted as saying that while “some people believe football is a matter of life and death… it is much, much more important than that.” Many people would no doubt agree. The plethora of amazing sporting events that 2018 gave us unquestionably caused a huge range of emotions for the viewing public.

The Winter Olympic and Paralympic Games from South Korea, Commonwealth Games from Australia, Football World Cup from Russia and Ryder Cup from Paris were among the special events we were able to enjoy on top of the feast of fantastic sport we are served every year. Each of these events provided wonderfully rich storylines for TV journalists to capture, comment on or simply marvel at alongside the viewing public.

The viewing figures back up the theory that sport is extremely important to the nation. In 2018, almost every man, woman and child watched a sporting broadcast – 97.1% of the UK population in fact. Virtually all of those watched a live sporting broadcast. In a world of ever-expanding choice, where we are told that ‘old’ forms of entertainment are being replaced by new ones, it seems that the great British public are still firmly in love with watching sport – whether it be in the living room on the TV set or following via apps such as Sky Go on PCs, tablets and smartphones.

Viewing away from the TV set demonstrates the depth of commitment from fans. We saw the audience for the Friday morning fourballs at the Ryder Cup rise by 16%, while post-race coverage of the Mexican Grand Prix increased its audience by 18%. Making sure fans can get access to content when, where and how they want is crucial.

As a broadcaster working for Sky Sports and BBC Radio 5 Live, you have to have a keen interest in audience figures; who is

Above: 5th Test, England v. India © Sky Sports / Getty Images

Left: Netball Superleague © Sky Sports / Getty Images

watching what and how that changes. At Sky, for instance, we saw strong figures for our Premier League coverage in 2018. Liverpool’s dramatic victory over Man City back at the beginning of 2018 was Sky’s most watched Premier League game of the year, with an average audience of more than 2.2 million. In fact, there were 44 live games that were

viewed by more than a million people across Sky and BT Sport broadcasts. In 2009, that figure was only reached by 40 games.

The enduring popularity of the Premier League may not be surprising, but there were a number of other sporting moments that attracted large audiences throughout 2018. 7.8m people watched some aspect of cricket coverage on Sky Sports Main Event or Sky Sports Cricket, for instance.

Purists will be pleased to see that nine of the ten most-watched cricket broadcasts were from the closely-fought Test series between England and India. Alastair Cook, now Sir Alastair, announcing his retirement and scoring 147 in his final innings was a wonderful story that you couldn’t help but be moved by. As Steve James wrote in The Times: “It was emotional. Tears were shed. It was like being transported momentarily into another world.” Live sport delivers such spectacular moments time and again.

The viewing figures are impressive, but to return to Bill Shankly’s quote for a moment, I do believe that while sport, in itself, might not be a matter of life and death, it can certainly be a forum for debate about wider issues happening in our lives. There are numerous examples from sporting history, from the Black Power salute of Tommie Smith and John Carlos at the 1968 Olympics to Colin Kaepernick kneeling during the US national anthem in 2016. Closer to home, Raheem Sterling has spoken out about the treatment that black footballers receive in the media.

The sporting events that we choose to broadcast are important. In this respect, it has been wonderful to see increased coverage of women’s sport from broadcasters and more women in front of the camera. Alex Scott has been a brilliant addition to the Sky Sports Premier League team. Alex played 140 times for England and represented Team GB at the Olympics in 2012 – her knowledge of the game is phenomenal and can only serve to enhance our coverage.

In 2018 Sky covered the Netball Superleague, the World Rugby Women’s Sevens Series, all five women’s golf majors and more. In 2019 Sky will continue its commitment to covering women’s sport including the Ashes, Six Nations, Netball World Cup and Solheim Cup among others. We know that many other broadcasters also play a big role in covering women’s sport.

Women’s sport is getting closer to realising that virtuous circle of improving performance leading to increased media coverage and increased investment, creating increased participation and circling back to improving performance. Having female sports presenters and pundits is an important part of this – I want girls and young women who see me or Alex on TV to know that this world can be for them too.

Importantly, viewers want to watch. In April, more than 1.5m watched England and Wales play out a 0-0 draw as part of qualification for the Women’s World Cup in 2019. England and Scotland have qualified for the tournament that will be held in France in June this year. I for one will be watching the games, and the viewing figures that accompany them. If the Lionesses can go further than Gareth Southgate’s team did in 2018, I look forward to seeing some big numbers.

Kelly Cates, sports broadcaster, Sky Sports and BBC Radio 5 Live

IN 2018, ALMOST EVERY MAN, WOMAN AND CHILD WATCHED A SPORTING BROADCAST – 97.1% OF THE UK POPULATION

HOW ARE MULTIPLE-SCREEN DATA CHANGING THE WAY WE PLAN TV?

The media industry is in search of the Holy Grail: a single-source measurement of TV viewing across all screens and channels. In 2018, we got one step closer to this with the launch of multiple-screen viewing figures, the first stage of BARB's Project Dovetail initiative. While these additional data are very much welcomed, how do they change the way we deliver the best outcomes for our clients?

Overnight viewing figures have formed the bedrock of how we plan, buy and optimise television campaigns. The launch of a new campaign goes hand-in-hand with securing a kick-off spot in a top-rating programme to reach a mass audience. If a programme over- or under-performs, next-day negotiations ensue to secure the desired number of exposures. But in recent years, displacement of viewing has made this task more complicated.

Linear television viewing is now regularly timeshifted. On average, people watch 29.3 daily minutes of television timeshifted, and this timeshifted viewing accounts for an average increase of 15% on a typical overnight rating. Sometimes it can be more; the launch episode of Shipwrecked on January 28th 2019 was watched live by 219,000 people, but the consolidated 7-day figure more than tripled to 685,000. Consolidated ratings used as a proxy for reach become progressively difficult to estimate, making the buyer's job increasingly complex.

Some content is still watched live by the majority of its audience, in particular event programming – think of England in the World Cup. BARB data break down the numbers watching live or timeshifted within seven or 28 days, so we can buy the right spot when that live first-look is still the key metric; we're starting to see greater nuances in how we plan our television content.

In addition, while it's well-documented that linear television consumption is in decline, this is partially compensated for by the growth of BVOD services. The appetite to consume high-quality content for several hours a day remains, albeit fragmented across screens. BARB's new multiple-screen viewing data give us insight into how programmes are viewed across TV sets, PCs, tablets and smartphones. For example, in 2018, Love Island gained up to 27% incremental viewing uplift from non-TV devices, while Family Guy gained up to 8% uplift. Nonetheless, as a whole, non-TV set devices add less than 2% to TV set viewing; the TV set remains the favoured means of viewing. And despite these additional data on device consumption, we remain none the wiser as to the incremental reach BVOD can offer to a linear television campaign across all screens.

Using BVOD to supplement reach is centred in a linear television-first approach to planning. Interestingly, another aspect of BARB's data suggests that alternative approaches could be sensible to deliver impact in a fragmented viewing world. BARB can now measure viewing to programmes on BVOD services before they are broadcast. For example, 1.15m people chose to watch the second episode of Save Me via Sky On Demand pre-broadcast on TV sets; this was more than half of the total TV set audience of 2.19m. This increased throughout the series, with the final episode watched by 83% of people via Sky On Demand pre-broadcast.

BARB'S NEW MULTIPLE-SCREEN VIEWING DATA GIVE US INSIGHT INTO HOW PROGRAMMES ARE VIEWED ACROSS TV SETS, PCS, TABLETS AND SMARTPHONES

Understanding how programmes are consumed influences how we approach planning. A linear-first approach misses the opportunity to reach audiences when the content is at its most valuable; when it's providing the watercooler moment. We should instead be moving towards an audience and content-first approach – buying the right programming, at the right time for greatest impact amongst viewers.

The need to re-evaluate our planning approach becomes even more prominent when we consider that changes in consumer behaviour are starkest among younger audiences. Ad-supported YouTube and SVOD services such as Netflix and Amazon remain the top challengers to television's incumbent media owners. BARB's measure of unidentified viewing – where the TV set is used to do something other than watch a BARB-reported channel or BVOD service – includes viewing to SVOD services and online platforms. In 2018, unidentified viewing accounted for 48 daily minutes for all individuals, rising to 71 minutes for 16-34-year-olds. Greater insight into this consumption would be very much welcomed.

YouTube has expressed a willingness to be part of BARB's Joint Industry Currency (JIC) model, but in its own words it wants to be "represented appropriately and fairly". Here remains a fundamental problem with reconciling television and online viewing. Television is measured by impacts in units of 30 seconds, whereas online is measured by impressions with no time exposure element.

For the two to be comparable, we need to use duration-based measurement for online viewing. Everything needs to be clearly labelled so we aren't comparing apples and pears.

Meanwhile, addressable television is on the rise but is far from ubiquitous. In order to realise the long-promised future where television is a more efficient, targeted and digital-like medium, we need to reach a point where content and distribution are more vertically integrated. In this future, new measurement opportunities may complement the data offered by BARB through the likes of set-top box data. A more digital-like television future offers the opportunity to deliver precision at scale.

Trusted and accurate measurement remains essential to accountability, planning and optimisation, and increasingly so in a world where we see displacement, fragmentation and disruption. Ultimately, we need to understand the value that each exposure drives for advertisers. The outcomes are what are important; measurement allows us to link exposure to value.

The industry must come up with a measurement solution enabling better understanding of viewing patterns across all screens and channels. This is still some years away, even in the most advanced markets. BARB's Project Dovetail in the UK is setting the example, although we must remain patient before we achieve multiple-screen advertising campaign performance. Regardless, the JIC principles underpinning BARB should not be weakened or compromised.

Despite everything, linear television has sustained advertiser demand, giving the impression that it is as effective and essential as ever, but for how long, and in what balance relative to the alternatives?

TRUSTED AND ACCOUNTABLE MEASUREMENT REMAINS ESSENTIAL TO ACCOUNTABILITY, PLANNING AND OPTIMISATION

Emma Moorhead, Head of Activation Planning, Wavemaker

THE IMPORTANCE OF A JOINT INDUSTRY STANDARD

The big SVOD services' viewing data have long been shrouded in secrecy. But in January, Netflix let us take a peek behind the curtain. Their Q4 earnings release featured the following claims:

"In its first four weeks on Netflix, we estimate that Bird Box from director Susanne Bier will be enjoyed by over 80 million member households, and we are seeing high repeat viewing."

"A week ago, we launched Sex Education from the UK and it is also tracking to be a huge hit (estimated over 40 million households watching the title within the first four weeks)."

But what should we make of this information?

Firstly, the numbers stated were forecasts of future performance – typical perhaps for financial releases, but relatively unheard of in TV ratings measurement.

Secondly, it wasn't entirely clear what the numbers meant. Netflix stated that "for series, due to their highly variable length, we count a viewer if they substantially complete at least one episode (70%)". This is not how the TV industry in the UK has typically measured performance (i.e. the average audience who watched the show throughout its run time) and could inflate the series' average figures (because it will not take into account the number of viewers who drop off during the series).

And thirdly, releasing data in this way highlights only the successes. Many of the big global digital companies are selective about the information they release. Until they sign up for a joint industry standard such as BARB here or work with Nielsen in the US, we – and they - will lack context and a common language to understand these numbers more fully.

THE CHALLENGE IS THAT WE ARE ALL VYING FOR TALENT AND IDEAS. BUT IF THERE IS NO STANDARD, THEN WE ARE NOT COMPETING ON A LEVEL PLAYING FIELD

The SVOD services will understandably point to other drivers for their approach to audience data. The data they are gathering from their own sophisticated user databases helps inform which programmes to commission and acquire, and how to surface those programmes to a viewer. Their company valuations and share prices are dependent on growth in subscriber numbers and ARPU, not the performance of any individual programme. And they've been clear that the act of revealing performance data is more about hinting at the cultural weight of their programmes – their 'cultural metrics', designed "to allow creatives to understand the reach of their work".

But for the BBC, and more importantly for the wider UK TV sector, the lack of context and transparency does matter. The challenge for the BBC, and for many other broadcasters and platforms, is that in an incredibly competitive market we are all vying for talent and ideas to make the best possible programmes for our audiences. But if there is no standard, then we are not competing on a level playing field.

And how will talent understand how many people have seen their programmes, and who is watching? Without a standard way of evaluating the performance of programmes, channels and services, it is harder for them to make the right decisions about who to work with, how to shape and improve their programmes, and the best ways for them to be scheduled and distributed.

For our commercial peers, where business models can rely heavily on generating advertising income, a standardised currency is essential to inform advertising prices.

It is this need for a standard that makes BARB's JIC measurement so valuable to the BBC, to commercial broadcasters and to the wider TV market. Having access to transparent, robust data is a critical part of the TV industry ecology in order to inform all of our creative and business decisions.

Left: Fleabag © BBC

HAVING ACCESS TO TRANSPARENT, ROBUST DATA IS A CRITICAL PART OF THE TV INDUSTRY ECOLOGY IN ORDER TO INFORM ALL OF OUR CREATIVE AND BUSINESS DECISIONS

But whilst a standardised currency is incredibly valuable, it's also essential that the standard evolves with audiences' changing viewing habits.

Despite significant progress with BARB's Project Dovetail, the TV industry still doesn't have a consistent way of measuring total consumption of a programme across all platforms, over the life of that programme. Our system is still primarily based around viewing in the first 28 days after a programme has broadcast. But as the industry experiments with longer availability on VOD platforms, this is increasingly becoming an anachronism. As much as 60% of viewing of the first series of Fleabag (pictured) occurred outside of 28 days of the first TX, through BBC Three on iPlayer.

Because of this, the BBC and our peers will continue to rely on a combination of both BARB's data and our own array of data sources. For the BBC, this is our signed-in analytics across all of our online services (including iPlayer), our Live+7 and Live+28 reports, as well as our cross-media measurement survey, to name a few. We look at who is watching a given programme or channel, but also what they think of the programme and the impact it has had on them.

Of course, it is creativity, not data, that is the lifeblood of the TV industry. As the BBC's Director of TV Charlotte Moore said last year: "I don't believe any amount of data can tell you what to commission next".

But having a common, shared understanding of what's working and what isn't – well, it isn't a bad place to start.

Becky Marvell, Head of Television Strategy, BBC

MEASURING PRE-BROADCAST

It is clear that UK viewers love having access to programmes on-demand via the BVOD service apps on their devices. Primarily, this is to catch up on shows they have missed in the linear schedule; but increasingly, viewers can see future episodes in a series before their linear transmission.

Series stacking is when an entire series is made available through a BVOD service, usually on the day the first episode is broadcast. Several UK broadcasters have made programming available this way and, with BARB measurement, this provides opportunities to observe how viewers behave in an even more on-demand world. Research by ITV and Channel 4 in 2018 showed that 11% of people 'have nothing in mind' when they go to BVOD services, a figure that's more than doubled in two years. Viewers are using these services not just to catch up, but to discover new things to watch.

Crucial to BARB's ability to identify this pre-transmission viewing is broadcaster collaboration by providing audio files that allow BARB to recognise the programme viewed. By December 2018, BARB was tracking over 2,500 non-linear programme audio assets, almost a ten-fold increase in under two years.

Sky Atlantic's Save Me illustrates how viewers behave when a series box set is available on-demand. The data are enhanced by BARB's ability to distinguish between post-transmission timeshifted and on-demand viewing on TV sets in Sky homes.

This chart shows that viewing on-demand makes up 80% of the total to the series. 69% of total viewing to episodes 2-6 was before the live transmission – a proportion that rises steadily, from 53% to episode 2 to 83% to the final episode. Separate analysis points to some box-set bingeing, with 128,000 people devouring all six episodes the day after episode 1's broadcast, and a further 623,000 polishing off the whole series in the days before episode 2 went out.

So-called traditional viewing behaviours – of live viewing (almost invisible in these data) and catch-up via timeshift – account for less than 20% of the total.

On the BBC, we have another example of how box-setting is transforming viewer behaviour. Killing Eve premiered on BBC1 on September 15th 2018, with all episodes available on BBC iPlayer simultaneously.

A snapshot of episode 6 breaks down viewing into pre-broadcast, live and post-broadcast; as well as identifying which devices were used for each. The inner part of the pie shows more than half of the audience (52%) viewing pre-transmission; almost a fifth watching live, and 29% viewing post-broadcast.

Pre-transmission viewing saw the highest use of non-TV devices, with an average audience of 812,000 on a PC, tablet or smartphone; the vast majority (83%) on the bigger two screens and only 136,000 on smartphones.

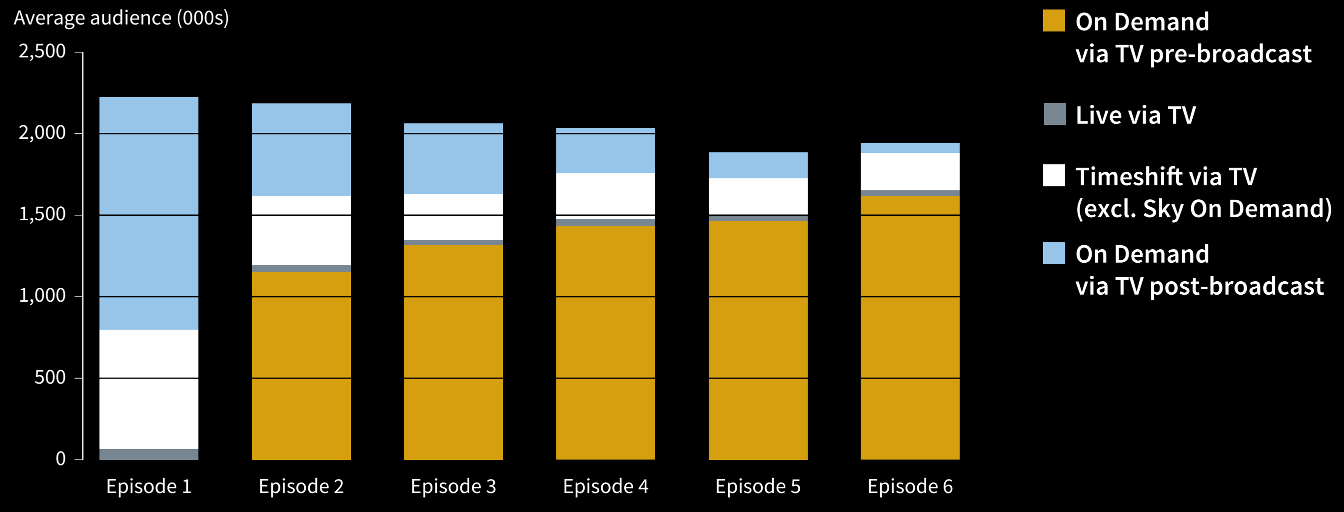
Live viewing was almost entirely on a TV set, with only 12,000 watching live on a PC, tablet or smartphone. Devices came back into the picture a little more for catching up, although only accounting for around 8% of viewing there.

The dominance of TV set viewing - whether pre (84% of total), live (99%) or catch-up (92%) - is a reminder of how much viewers prefer the big screen.

As broadcasters continue to experiment with box-setting series, it seems certain that we'll see viewing behaviours continue to evolve in the emerging television ecosystem.

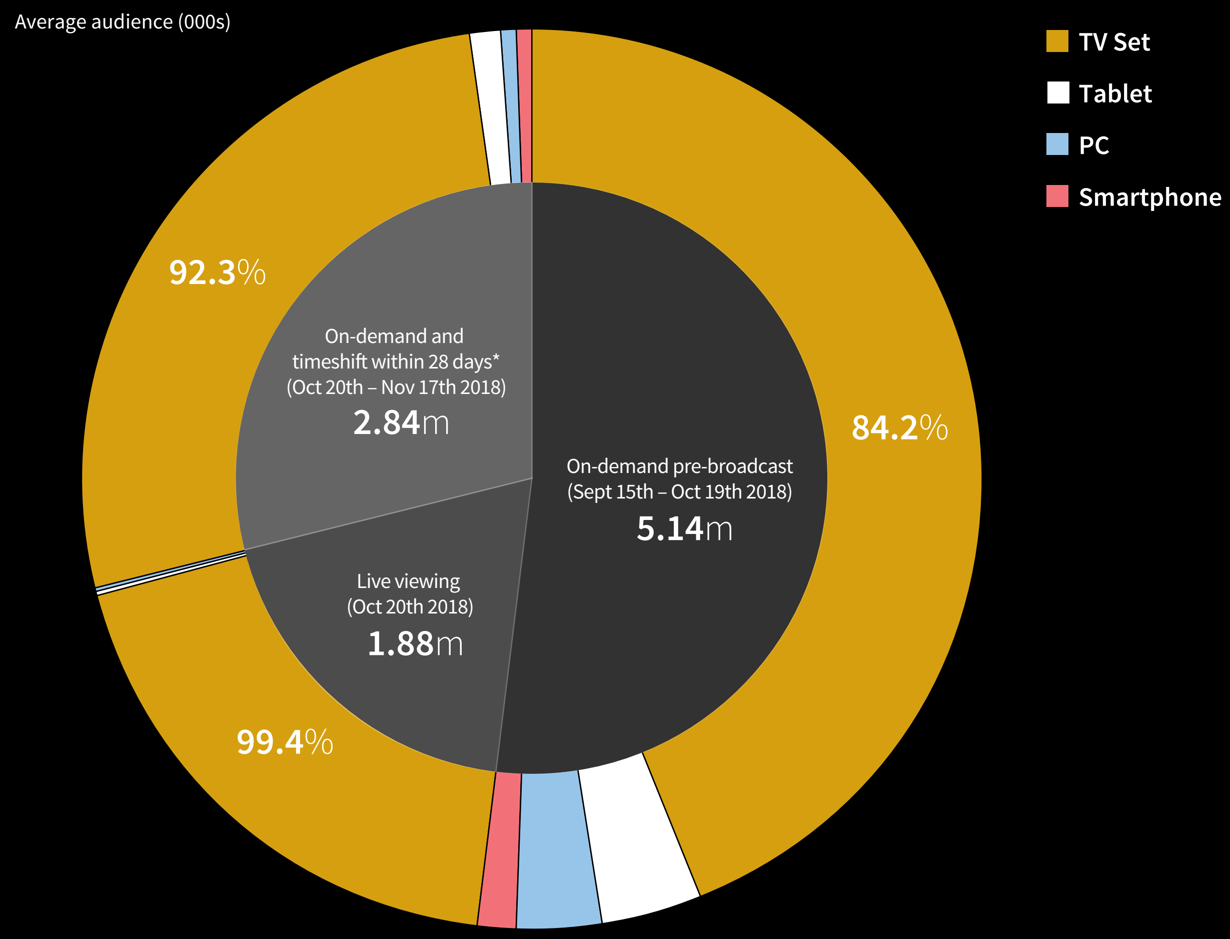
BOX-SETTING IS TRANSFORMING VIEWER BEHAVIOUR. 69% OF TOTAL VIEWING TO SAVE ME EPISODES 2-6 WAS BEFORE THE LIVE TRANSMISSION

SAVE ME (Sky Atlantic)



Source: BARB 28/02/18 – 02/05/18. Timeshift / On Demand data are 28-day consolidated figures

KILLING EVE Episode 6 (BBC 1)



Source: BARB, All individuals 4+, average audience
*Includes VOSDAL and on-demand viewing on day of linear broadcast, and viewing of the linear repeat on October 26th

DEVICES IN THE TV ECOSYSTEM

Smartphones and tablets have become so ubiquitous and so much a part of our everyday lives that it's easy to forget that it's only since 2007 (the first iPhone) and 2010 (the first iPad) that we've been using these kinds of devices (other brands are available). And while they have had a revolutionary impact on people's experience of television, allowing them to watch whenever and wherever they want, BARB data show that time spent with BVOD services on PCs, tablets and smartphones only adds approximately 1.3% to TV set viewing, and viewing seem to be stabilising there.

The enduring affection that UK viewers have for the TV set has been the story of recent years, influenced in part by the growing number of households with smart TV sets – internet-connected devices featuring BVOD services, SVOD services and social media apps. But while viewing on non-TV set devices has perhaps turned out to be much less of a revolution than was anticipated by the industry, these devices remain an important priority for BARB to report on. A fascinating source of insight about how people are adapting to a multi-device television world is emerging.

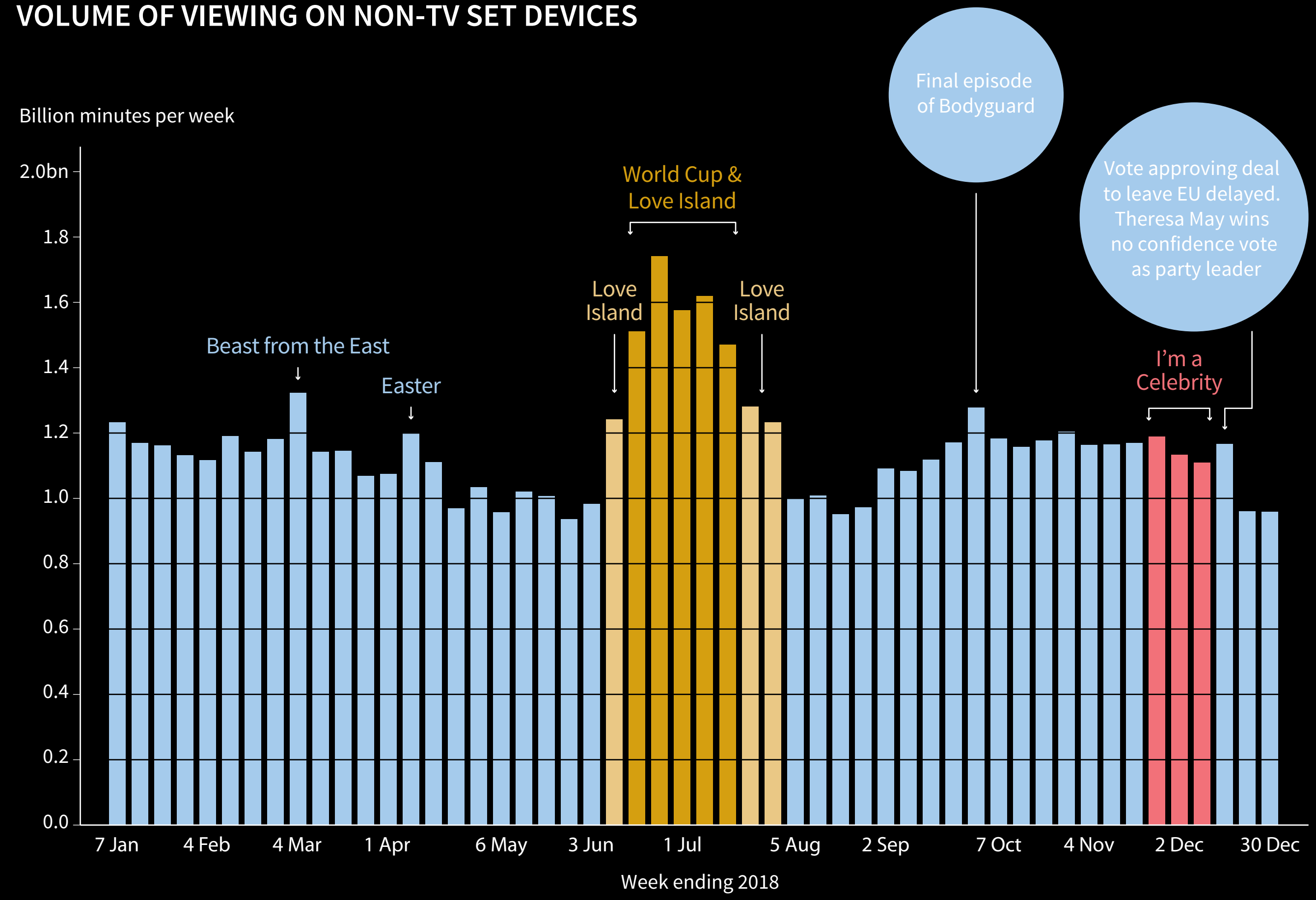
The first chart provides a snapshot of viewing on non-TV set devices, week by week across 2018. The peaks along this timeline are a reminder of those moments when we just can't manage to get home to see events unfolding live, or when someone else has got command of the TV set remote control. Sometimes it's been politics (breaking news on Brexit, anyone?), or the weather (Beast from the East) that's had us grabbing our devices; it's also been television's capacity to create events of its own making – whether the highly-addictive Love Island (that yet again attracted a younger, device-orientated summer audience in their droves), the final episode of Bodyguard or I'm a Celebrity that again took us to the sweltering jungle as we hunkered down for the winter. Many would say that it was the football World Cup, one of the biggest global television events of them all, that registered the year's biggest peaks in viewing on non-TV devices (whilst fans of Love Island would rightly remind us that it too was running throughout those World Cup weeks). It's all these kinds of events that can make our devices particularly irresistible.

Taking a longer-term view back to the beginning of 2017, the next chart can show us the evolution in share of device viewing, with tablets holding their own since 2017 as the device with the highest share; while smartphones are steadily taking share from PCs over the same period. It's well-reported that penetration of tablets and →

Above: Bodyguard
© BBC / World Pictures

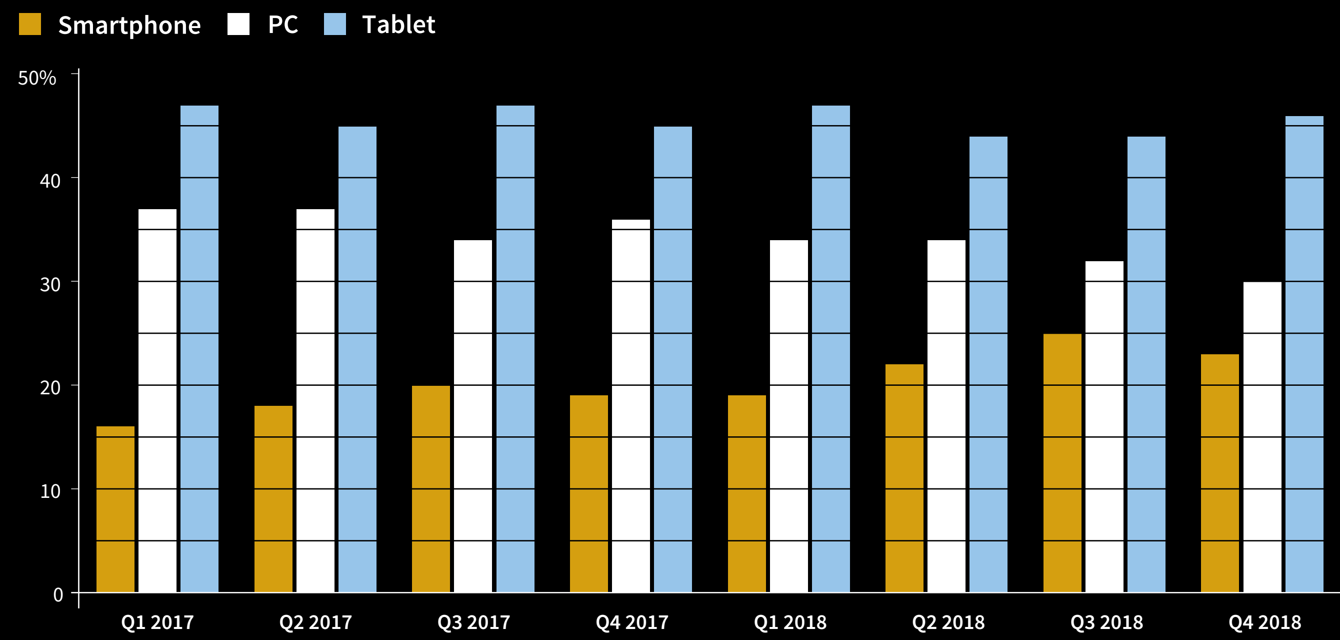
TIME SPENT WITH BVOD SERVICES ON PCS, TABLETS AND SMARTPHONES ONLY ADDS APPROXIMATELY 1.3% TO TV SET VIEWING

VOLUME OF VIEWING ON NON-TV SET DEVICES



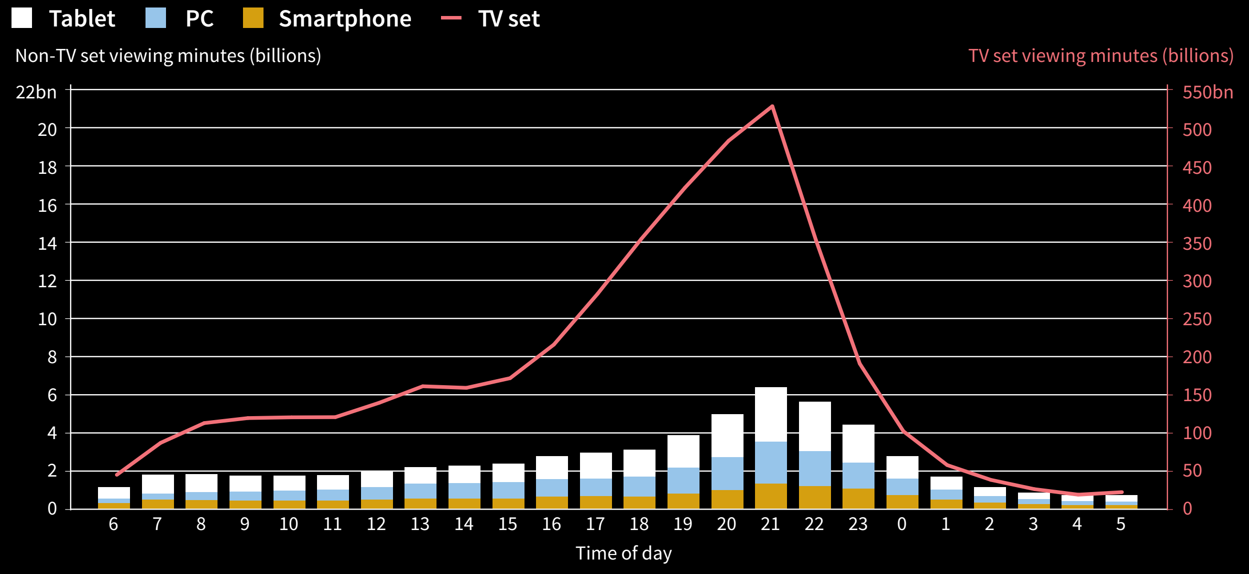
Source: BARB PC, tablet and smartphone census data, 2018

SHARE OF NON-TV SET VIEWING OVER TIME BY DEVICE



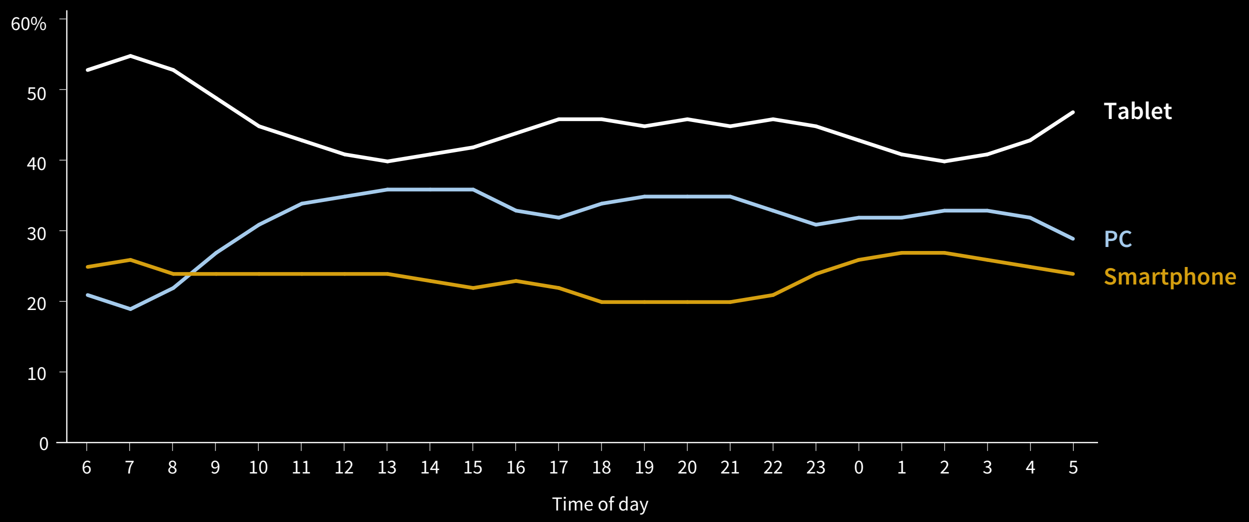
Source: BARB PC, tablet and smartphone census data, 2018.
Note: From Q2 2018, Sky PC viewing is not included in these data. Further analysis shows that this does not impact overall trends observed.

TELEVISION VIEWING BY TIME OF DAY BY DEVICE



Note: TV set viewing is plotted on a separate axis to device (smartphone, PC and tablet) viewing.
Data are for identified viewing to BARB-reported channels on TV sets / tagged BVOD services on devices. Device data are census data.
Source: BARB, 2018

SHARE OF NON-TV SET VIEWING BY TIME OF DAY AND DEVICE TYPE



Source: BARB PC, tablet and smartphone census data, 2018

Above: I'm a Celebrity… Get Me Out of Here!
© ITV

smartphones have both plateaued (at high levels) in recent years (Ofcom tells us that 58% of households have tablets, 78% have smartphones), so it appears there's a subtle behaviour change going on, not driven by device penetration but a simple preference for using smartphones rather than PCs for viewing television. The prevalence and utility of the BVOD service apps, and steadily enlarging smartphone screen sizes, are no doubt drivers of this.

So whilst there are some subtle evolutions still going on, it seems the overall landscape for viewing on devices is generally settling down. The first chart on page 16 reminds us that viewing on those devices (combined) still largely follows the daypart pattern that's been long-established for the TV set, building from late afternoon onwards to the familiar evening peak at 21.00. It's interesting, though, that device use seems to skew slightly later in the evening, with 22.00 being the second most-watched hour for devices, compared with 20.00 on TV sets. (Note that this chart combines two data-sets using two different scales on the vertical axes: the 21.00 peak accounting for over 500 billion minutes on the TV set and just over 6 billion minutes on devices.)

Not all devices are the same, though; and the second chart opposite gives us the 2018 picture of how we turn to different devices at different times of the day. Tablets account for the biggest share of non-TV set device viewing at every clock-hour. But the daypart pattern of viewing on tablets suggests that they continue to be devices generally used at home – gaining the most share before work (or school) and building share again in the late afternoon and all the way through the evening.

Viewing on PCs starts to look like it could be a guilty pleasure during working hours, but then takes a solid share throughout the evening too when it's still more popular than smartphones.

It's only in the 'wee small hours' that smartphones gain their peak share of viewing (night workers and insomniacs, perhaps) and only between 6am and 8am that smartphones take a higher share of device viewing than PCs; for many of us the first device we come into contact with on waking.

Generally, then, we're seeing a picture of viewing on devices that's settling into a stable pattern – with the TV set continuing to account for almost 99% of total viewing but with devices creating opportunities for must-see incremental viewing at other times and places.

WHILST THERE ARE STILL SOME SUBTLE EVOLUTIONS GOING ON, THE OVERALL LANDSCAPE FOR VIEWING ON DEVICES IS GENERALLY SETTLING DOWN

MOST-WATCHED ON DEVICES

When we want to watch an unmissable programme but can't get to our TV set, we often turn to other devices.

This set of tables takes things down to the programme level and identifies those television moments that drive uplifts in audience numbers because people have used their PCs, tablets and smartphones to get the content they love.

In the first table, we see those programmes where device viewing has driven the biggest percentage uplifts. The analysis sets a minimum TV set audience of 100,000 but includes shows that achieved many more TV set viewers – like The Only Way is Essex – and still gained substantial numbers of additional viewers on other devices. Similar reality entertainment shows had smaller TV set audiences but gained big audience uplifts from device viewing.

But taking the top slot in this table, and featuring strongly throughout, are children's drama series like Millie Inbetween and The Dumping Ground, where, from smaller TV set audiences, device viewing drove big percentage uplifts. Smartphone viewing was unusually high to these programmes, and often exceeded norms on tablets too. Recent reports from Ofcom and Childwise about 5-16s defaulting ever more to devices and away from the TV set would support this observation.

Special mention has to go to Avengers: Infinity War, which added 20% to its Christmas Day TV set audience with viewing on devices. Marvel superheroes not to everyone's taste at Christmas, perhaps.

The second table shows the programmes that achieved the biggest absolute audiences on non-TV set devices. Top slot goes to the finale of Bodyguard, which added 865,500 to its whopping TV set audience of over 14m (although this table is only for programmes broadcast from August 27th; if it was for all of 2018, then Love Island would have claimed top spot). These top-ranking programmes for device viewing were generally big hit series on the TV set too – the top five in this table all added over 400,000 to their TV set audience. A closer look at the broadcast dates reveals that it's often the series debut or finale that drives these big audiences on devices.

While drama series dominate, three very different programmes remind us that must-see television is when devices come into their own: They Shall Not Grow Old, the First World War documentary recreated from original footage and shown on Armistice Day; the Christmas Day edition of Call The Midwife and Love Island: The Christmas Reunion (which was a hit on TV sets as well as gaining a big uplift via device viewing).

And such is the reputation of Sir David Attenborough, that the debut episode of Dynasties commanded over 250,000 viewers on non-TV devices.

Further analysis (not shown here) gives us the top-ranking programmes on each device. Bodyguard takes top position on every device, but all the other top-ranking device-led programmes punched above expectations on particular devices – The Apprentice to PC (seems appropriate); I'm a Celebrity and The Cry to tablet; and Love Island: The Christmas Reunion to smartphone.

So, it's clear that different devices suit different audiences, genres and programmes, and markedly different behaviour patterns may emerge over time. Fortunately, BARB data will allow us to keep an eye on it all.

IT'S CLEAR THAT DIFFERENT DEVICES SUIT DIFFERENT AUDIENCES, GENRES AND PROGRAMMES, AND MARKEDLY DIFFERENT BEHAVIOUR PATTERNS MAY EMERGE OVER TIME

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

	Programme	Average audience – individuals (000s)					
		PC	Smartphone	Tablet	TV	Non-TV total	Non-TV uplift
1	**Millie Inbetween** (CBBC, 10/12/18)	7.0	25.2	33.1	104.4	65.4	63%
2	**The Dumping Ground** (CBBC, 07/12/18)	12.9	48.2	46.3	199.0	107.4	**54%**
3	**Love Island: Australia** (ITVBe, 04/09/18)	17.6	19.8	24.8	135.4	62.2	**46%**
4	**Celebs Go Dating** (E4, 16/10/18)	58.3	62.5	40.8	569.4	161.7	**28%**
5	**Absolutely Ascot** (ITVBe, 04/11/18)	11.7	18.1	19.0	180.8	48.9	**27%**
6	**Love Island: The Christmas Reunion** (ITV2, 17/12/18)	199.6	200.3	128.9	1,967.4	528.8	**27%**
7	**Sam & Billie Faiers: The Mummy Diaries** (ITVBe, 14/11/18)	28.5	30.7	39.8	380.5	99.0	**26%**
8	**The Only Way is Essex** (ITVBe, 21/10/18)	66.3	73.0	70.4	819.4	209.7	**26%**
9	**Reported Missing** (BBC1, 11/09/18)	35.8	25.7	45.0	421.8	106.4	**25%**
10	**Show Me What You're Made Of** (CBBC, 19/11/18)	2.5	6.9	15.8	110.5	25.2	**23%**
11	**The Inbetweeners** (E4, 30/12/18)	3.4	13.8	7.7	109.7	24.9	**23%**
12	**Made in Chelsea** (E4, 15/10/18)	73.4	59.1	49.2	802.6	181.6	**23%**
13	**Gemma Collins: Diva Espana** (ITVBe, 29/08/18)	17.6	21.0	29.1	309.5	67.7	**22%**
14	**Topsy and Tim** (CBeebies, 24/12/18)	2.0	7.8	31.1	187.1	40.9	**22%**
15	**The Story of Tracy Beaker** (CBBC, 02/12/18)	2.1	7.9	12.5	104.0	22.5	**22%**
16	**Weekender: Boat Party** (ITV2, 30/10/18)	11.5	13.3	13.5	178.5	38.3	**21%**
17	**The Next Step** (CBBC, 28/11/18)	3.0	9.9	12.9	122.6	25.8	**21%**
18	**Avengers: Infinity War** (Sky Cinema Action & Adv, 25/12/18)	8.1	6.6	17.3	156.5	**32.0**	**20%**
19	**People Just Do Nothing** (BBC2, 19/11/18)	27.2	29.9	23.1	401.6	80.1	**20%**
20	**Made in Chelsea: Croatia** (E4, 27/08/18)	65.2	38.5	53.6	795.6	157.3	**20%**

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

	Programme	Average audience – individuals (000s)					
		PC	Smartphone	Tablet	TV	Non-TV total	Non-TV uplift
1	**Bodyguard** (BBC1, 23/09/18)	397.9	160.9	306.7	14,335.2	865.5	6%
2	**Love Island: The Christmas Reunion** (ITV2, 17/12/18)	199.6	200.3	128.9	1,967.4	**528.8**	27%
3	**The Apprentice** (BBC1, 03/10/18)	256.7	111.9	147.4	6,555.1	**516.0**	8%
4	**I'm a Celebrity... Get Me Out of Here!** (ITV, 19/11/18)	223.1	125.7	160.6	12,627.6	**509.3**	4%
5	**The Great British Bake Off** (Channel 4, 23/10/18)	187.8	125.8	113.9	9,075.2	**427.6**	5%
6	**Doctor Who** (BBC1, 07/10/18)	234.4	80.1	110.5	10,535.0	**425.0**	4%
7	**The Cry** (BBC1, 21/10/18)	129.3	72.2	159.7	6,990.3	**361.3**	5%
8	**Killing Eve** (BBC1, 15/09/18)	161.1	60.0	135.5	5,423.5	**356.7**	7%
9	**EastEnders** (BBC1, 09/10/18)	81.8	129.6	117.9	4,543.5	**329.4**	7%
10	**Mrs Wilson** (BBC1, 11/12/18)	83.2	50.5	158.6	7,221.6	**292.3**	4%
11	**Louis Theroux's Altered States: Love Without Limits** (BBC2, 04/11/18)	150.0	47.8	80.1	2,438.2	**277.9**	11%
12	**They Shall Not Grow Old** (BBC2, 11/11/18)	135.6	36.4	80.7	3,653.0	**252.7**	7%
13	**Dynasties** (BBC1, 11/11/18)	150.2	34.8	65.5	7,384.4	**250.5**	3%
14	**The Only Way is Essex** (ITVBe, 30/09/18)	73.1	80.1	73.9	915.1	**227.1**	25%
15	**Call The Midwife** (BBC1, 25/12/18)	47.1	40.9	135.1	8,718.2	**223.2**	3%
16	**The Little Drummer Girl** (BBC1, 28/10/18)	101.7	25.7	94.1	6,588.0	**221.5**	3%
17	**Wanderlust** (BBC1, 04/09/18)	73.1	39.8	101.4	3,900.9	**214.3**	5%
18	**Informer** (BBC1, 16/11/18)	81.6	44.4	80.1	4,333.2	**206.2**	5%
19	**Have I Got News For You** (BBC1, 12/10/18)	101.6	33.7	66.7	4,720.7	**201.9**	4%
20	**Celebs Go Dating** (E4, 14/10/18)	71.7	78.6	49.7	811.6	**200.0**	25%

Source: BARB 27/08/18 - 31/12/18 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

Since September 2018, BARB has reported programme average audiences for the most commonly-used demographics by combining two data sources: device-based census data from BVOD services showing the number of PCs, tablets and smartphones used to watch programmes; and BARB panel data that tell us the number of people watching and who they are.

The combination of these two sources enables the production of multiple-screen viewing figures, with demographic information available for PCs and tablets. BARB doesn't yet produce panel measurement of viewing on smartphones.

The first chart shows us the age profile of three-screen viewing to the second episode of the 2018 series of I'm a Celebrity… Get Me Out of Here!, one of ITV's biggest shows for the 16-34 audience. Here we see a broad age profile for the audience watching on TV sets. But if we consider device viewing as a mark of an audience's passion for a show, it looks like the passion for I'm a Celebrity wanes around the age of 55. Those aged 55 and over comprise over 32% of the TV set viewing audience, but only tiny proportions of the tablet (6.5%) and PC (4.2%) audiences. While viewers aged 16-44 account for a big share of I'm a Celebrity's audience on devices, it seems the show has remarkable appeal to the 45-54 age range: comprising a whopping 37.2% of its PC-viewing audience and a chunky 28.4% of the tablet audience. That looks like a really motivated audience – closer in age to celebrities John Barrowman (52) and Nick Knowles (56) than winner Harry Redknapp (72) or runner-up Emily Atack (29).

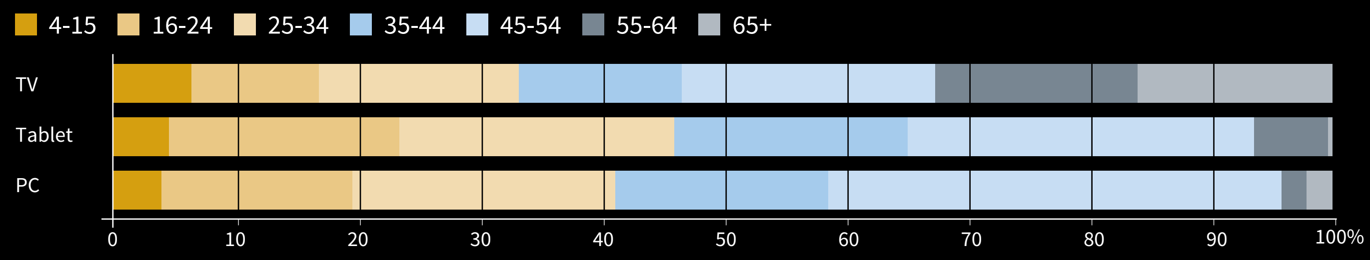
The following chart illustrates the age profile of three-screen viewing to the launch episode of the latest series of The Great British Bake Off, C4's highest-rating broadcast show and also one of its biggest deliverers of 16-34 audiences. It has broad appeal across the age range, as we can see from the TV set viewing profile. The age profile of viewing on tablets and PCs is broad too, but with noticeably smaller proportions of the youngest (aged 4-15) and older (55 and over) viewers. PC and tablet viewing are particularly concentrated in the 16-34 age group; with 16-24s accounting for a huge 27.8% of viewing on PCs, almost three times the proportion that they comprise of the TV set viewing audience. Bake Off provides a welcome break from studying or work, perhaps. The next age cohort of 25-34s are a big chunk of device viewing too, accounting for 29.1% of tablet viewing to this show and over 26% of viewing on PCs.

Meanwhile, the final episode of the BBC's political drama Bodyguard drew a TV set audience, perhaps not surprisingly, skewed strongly to the ABC1 social grade (67% of the total). The audience viewing on PC was even more upscale, with ABC1s accounting for 89% of the total. In contrast, viewing to this show on tablets, while still biased to ABC1, was a little more evenly spread.

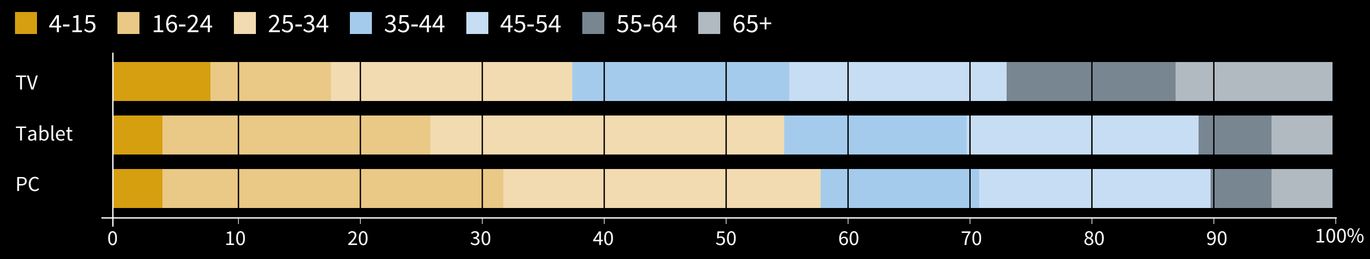
But if the social grade of Bodyguard's audience conforms to expectations, it might be a surprise to see the gender profile of device viewing to Taskmaster on UKTV's Dave. The gender split of TV set viewing to this show gives us a predictable skew to men – 52% of the audience. But women account for 59% of viewing on tablets and 58% of viewing on PCs. So Taskmaster's not as blokey as you might have thought, or maybe Greg Davies and his crew have a female fan-base that's taking (secretly?) to tablets and PCs to follow the show.

SINCE SEPTEMBER 2018, BARB HAS REPORTED PROGRAMME AVERAGE AUDIENCES FOR THE MOST COMMONLY-USED DEMOGRAPHICS BY COMBINING TWO DATA SOURCES: DEVICE-BASED CENSUS DATA AND BARB PANEL DATA

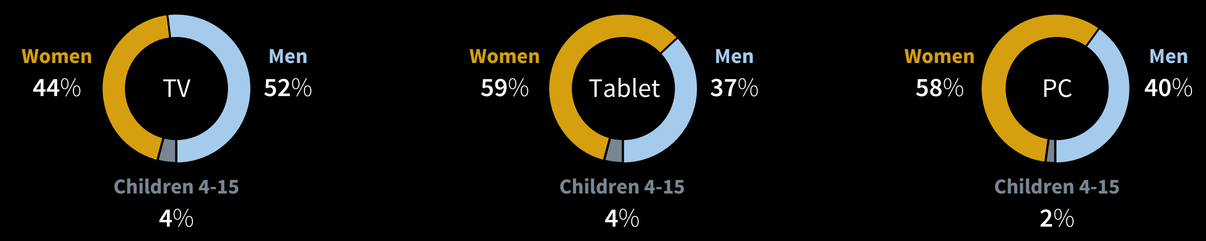
I'M A CELEBRITY...GET ME OUT OF HERE! (ITV, 19/11/18) AGE PROFILE BY DEVICE



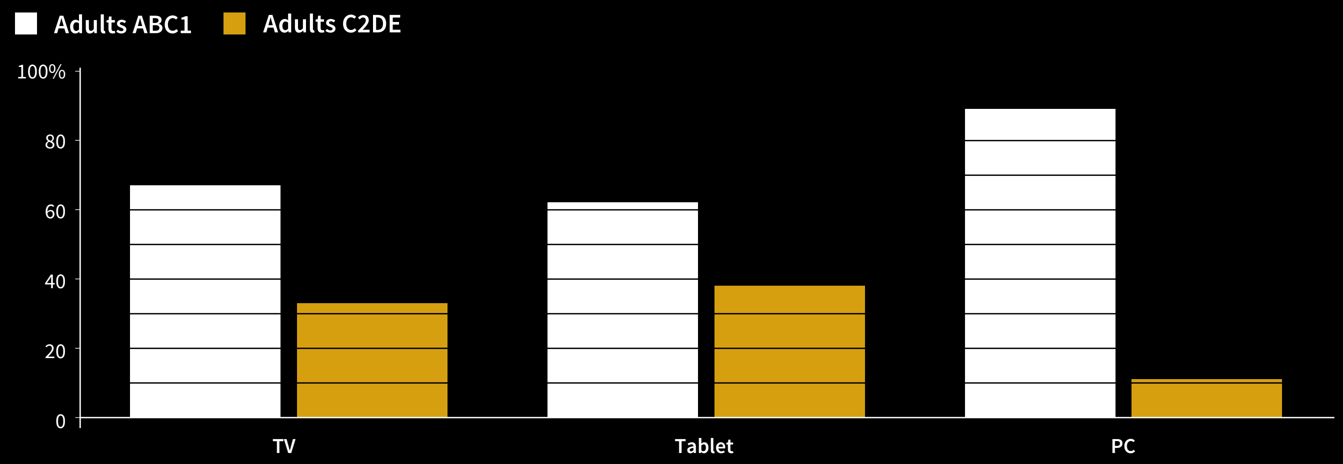
THE GREAT BRITISH BAKE OFF (CHANNEL 4, 28/08/18) AGE PROFILE BY DEVICE



TASKMASTER (DAVE, 07/11/18) GENDER PROFILE BY DEVICE



BODYGUARD (BBC1, 23/09/18) SOCIAL GRADE BY DEVICE



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

THE GROWTH OF SVOD SERVICES

The fragmentation of the media landscape is far from a new concept, but the growing competition for viewers' time is increasingly evident. In 2018, time spent on unidentified viewing – where the TV set was used to do something other than watch a BARB-reported channel or on-demand service – increased to 20% of all TV set activity, up from 17% in the preceding 12 months. That is a rise from 41 to 48 minutes a day on average.

What is driving this growth in unidentified viewing? As the name suggests, we can't be certain, but we do have a growing body of evidence that points to SVOD services being a primary catalyst.

One angle of investigation is to compare unidentified viewing with SVOD penetration figures from our Establishment Survey, which has included a question about SVOD subscriptions since 2014. Plotting the number of SVOD homes against the average quarterly levels of unidentified viewing shows a strong correlation between the two: an R^2 of 0.95.

Establishment Survey data also tell us that 12.3 million homes in the UK had at least one of Netflix, Amazon Prime Video or Now TV in Q4 2018 – a year-on-year increase of 20%. Netflix is the main driver of this increase, having added 2.2 million homes compared to Q4 2017. Amazon too has shown impressive growth, adding more than a million homes, while Now TV has added just under 100,000. We have also seen the number of homes with two or more services rise by 32% from 3.26 million to 4.3 million in the past year.

We can also find out more about the kinds of households that are likely to subscribe to an SVOD service from the Establishment Survey data. Looking at household size, we can see that one or two-person households - 72% of which have adults aged 55+ present – are less likely than the UK average to subscribe to an SVOD service.

By contrast, households with three or more people, which are more than 2.5 times more likely to have children present, are 47% more likely to subscribe to one of the three main SVOD services than the UK average. These multi-person households could also be occupied by young people. We know that 16-24-year-olds are 70% more likely than the UK average to have access to an SVOD service. This age group's daily unidentified viewing in 2018 was 65 minutes.

It's important to bear in mind that unidentified viewing is still a fifth of the time spent with the TV set, and not all unidentified viewing is to SVOD services; it also includes games playing on consoles and watching programming more than 28 days after broadcast. However, it's clear that SVOD services are very likely to account for a significant proportion of this viewing.

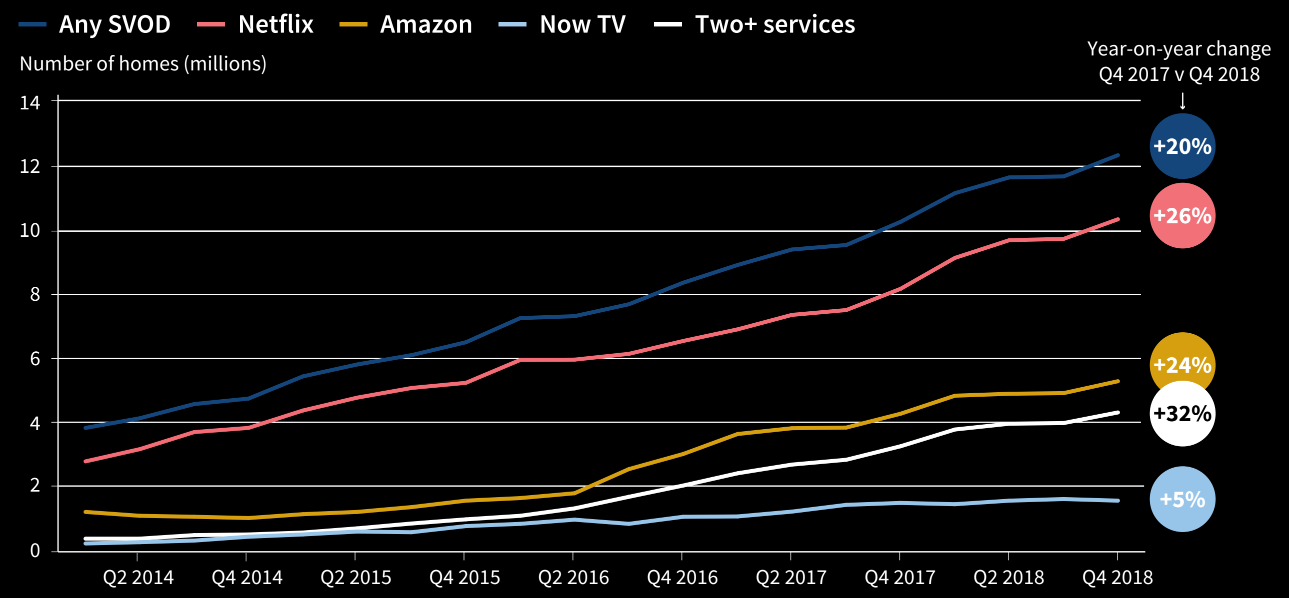
We recognise the industry's desire to unpack unidentified viewing, regardless of whether the service provider wants to be measured by BARB. This is why we are investigating the use of router meters in panel homes as a potential solution for identifying SVOD viewing. We are testing two router meter solutions, with the aim of providing the best possible view of the television ecosystem in which SVOD services are so very clearly already a part. Keep an eye on the BARB website for further updates.

To read BARB's recent SVOD report with further analysis, visit: *www.barb.co.uk/trend-spotting/the-svod-report/*

To see the latest data on SVOD household subscriptions, visit: *www.barb.co.uk/tv-landscape-reports/tracker-svod/*

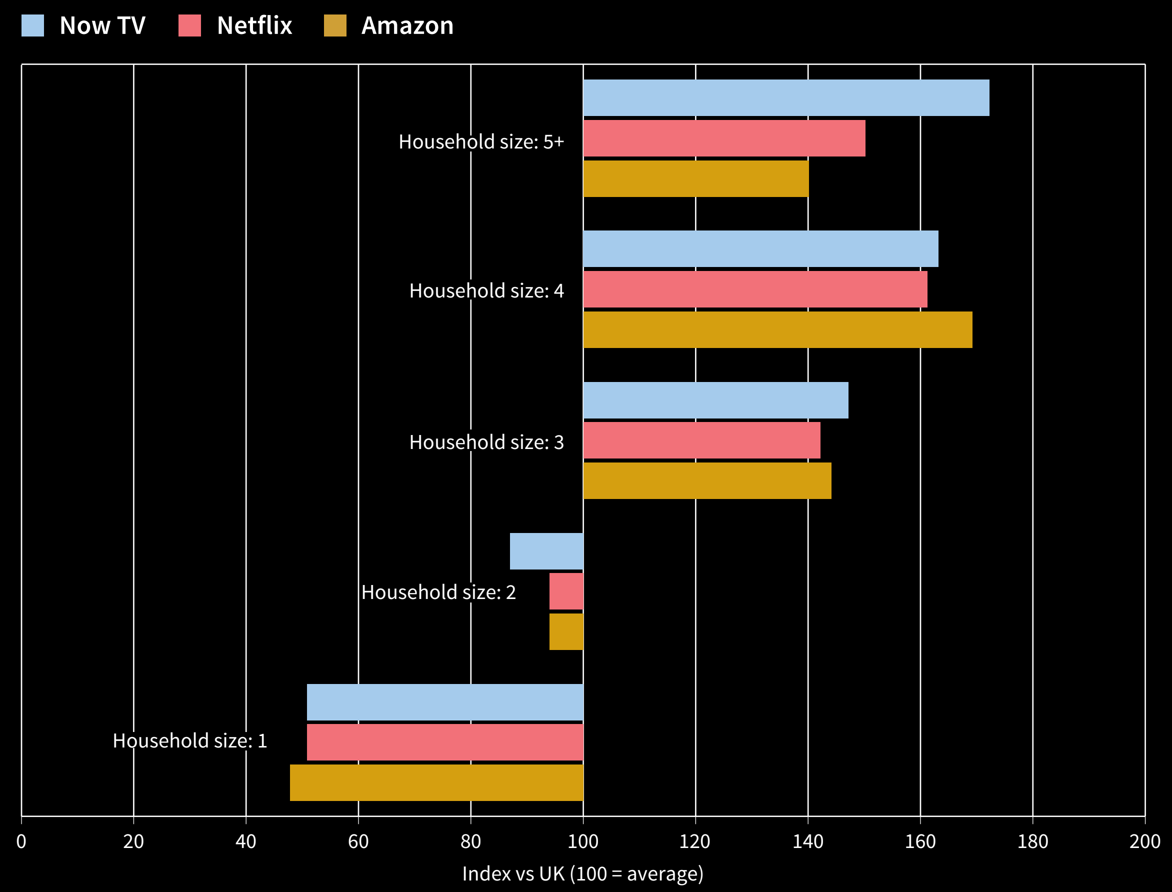
IN 2018, UNIDENTIFIED VIEWING INCREASED TO 20% OF ALL TV SET ACTIVITY; SVOD SERVICES ARE VERY LIKELY TO ACCOUNT FOR A SIGNIFICANT PROPORTION OF THIS

SVOD HOUSEHOLDS



Source: BARB Establishment Survey

HOUSEHOLD COMPOSITION



Source: BARB Establishment Survey Q4 2018

DOVETAIL FUSION

AN ILLUSTRATED GUIDE

1 COLLECT DATA FROM OUR TWO SOURCES

SOURCE A BARB PANEL
5,300 nationally-representative UK households. Meters track viewing on TV sets, tablets and PCs.

Information provided:
- Who is watching (demographic profiles)
- How many people watching: viewers-per-view
- Programmes watched
- Device used

Output: People-based data

SOURCE B DEVICE-BASED CENSUS DATA
Collected whenever anyone in the UK watches TV via a BVOD service on a PC, tablet or smartphone.

Information provided:
- Programmes watched
- Duration watched
- Device used

Output: Average programme streams (device data)

2 CONVERT DEVICE DATA TO ALL-INDIVIDUALS FIGURE

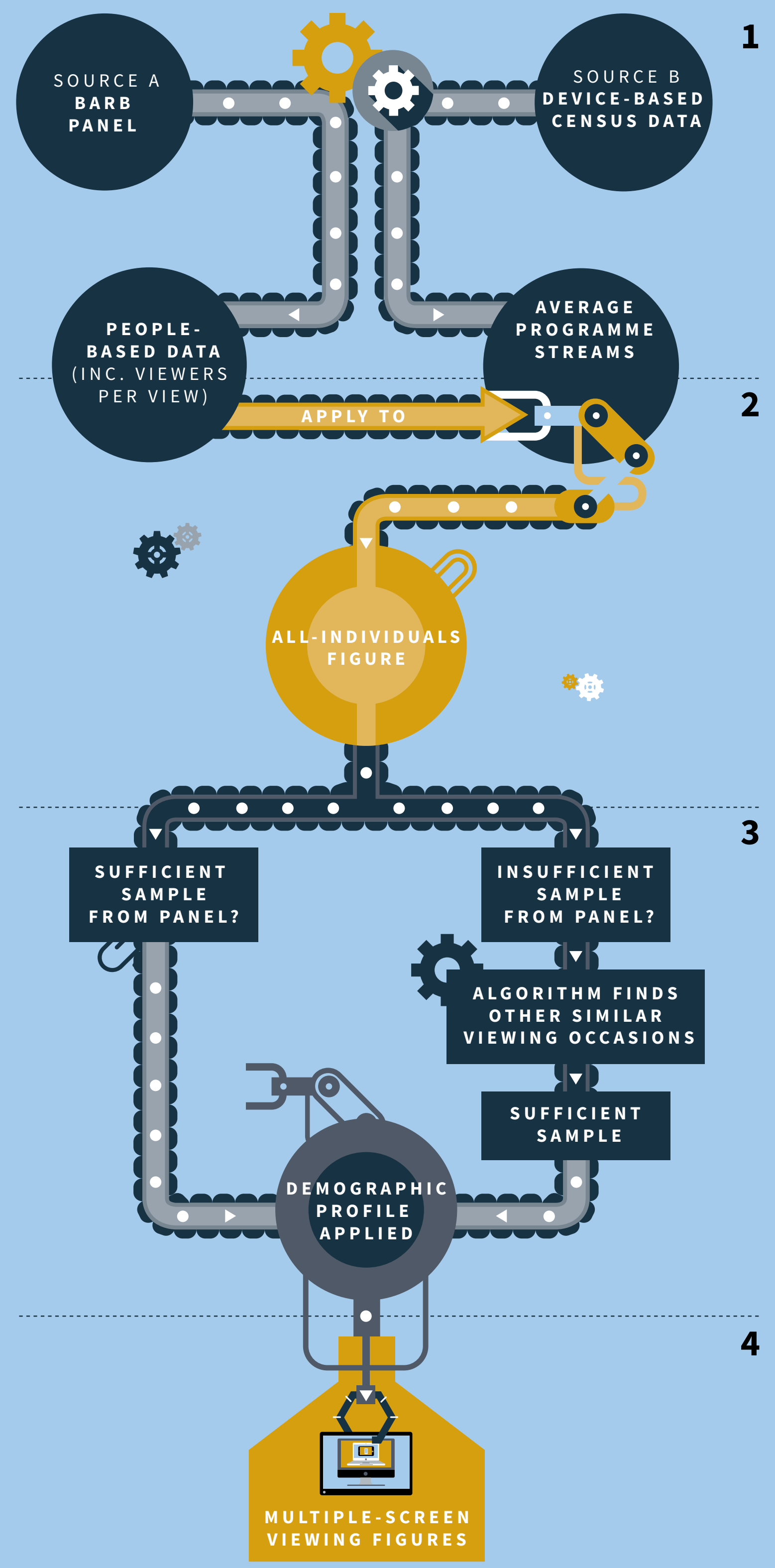
- Source viewers-per-view factor from the panel, which shows the extent of joint viewing for different programme types and devices
- Viewers-per-view factor applied to device data

3 APPLY DEMOGRAPHIC PROFILES TO ALL-INDIVIDUALS FIGURE (PC/tablet only)

- Check which BARB panel members have viewed a programme on their PC/tablet
- Sufficient sample? Demographic profile applied
- Insufficient sample? Algorithm finds other similar viewing occasions to generate sufficient sample. Demographic profile applied

4 RESULT: MULTIPLE-SCREEN VIEWING FIGURES

- Average audience for every programme on TVs, PCs, tablets and smartphones each day
- Demography of viewing on TVs, PCs and tablets



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?

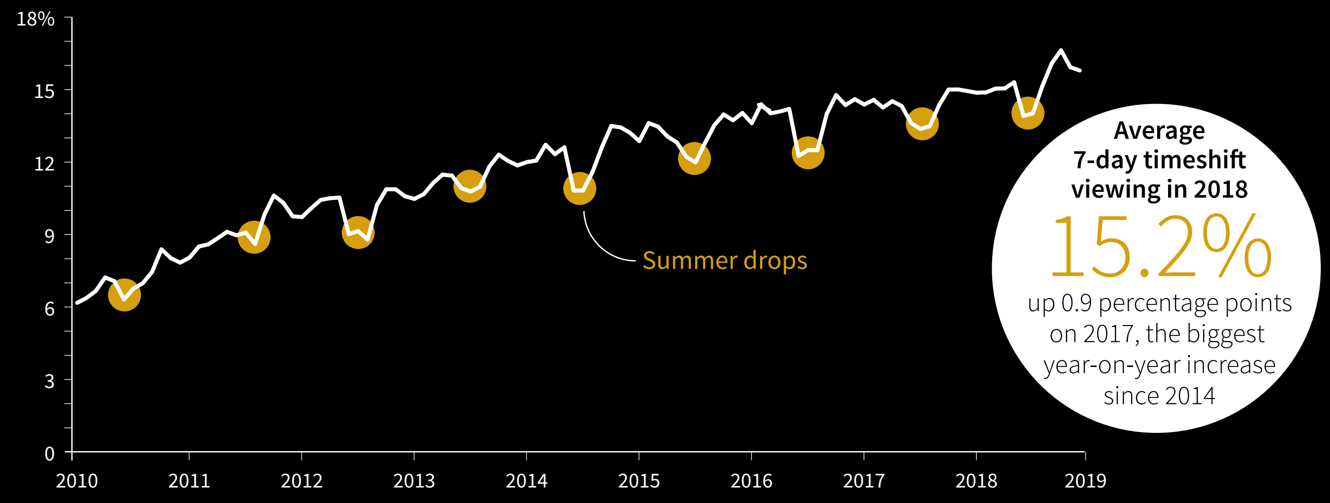
Share by genre – How did the genres rank by share of total TV viewing? Which genres saw significant increases or decreases in their share, and why?

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 2018 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.

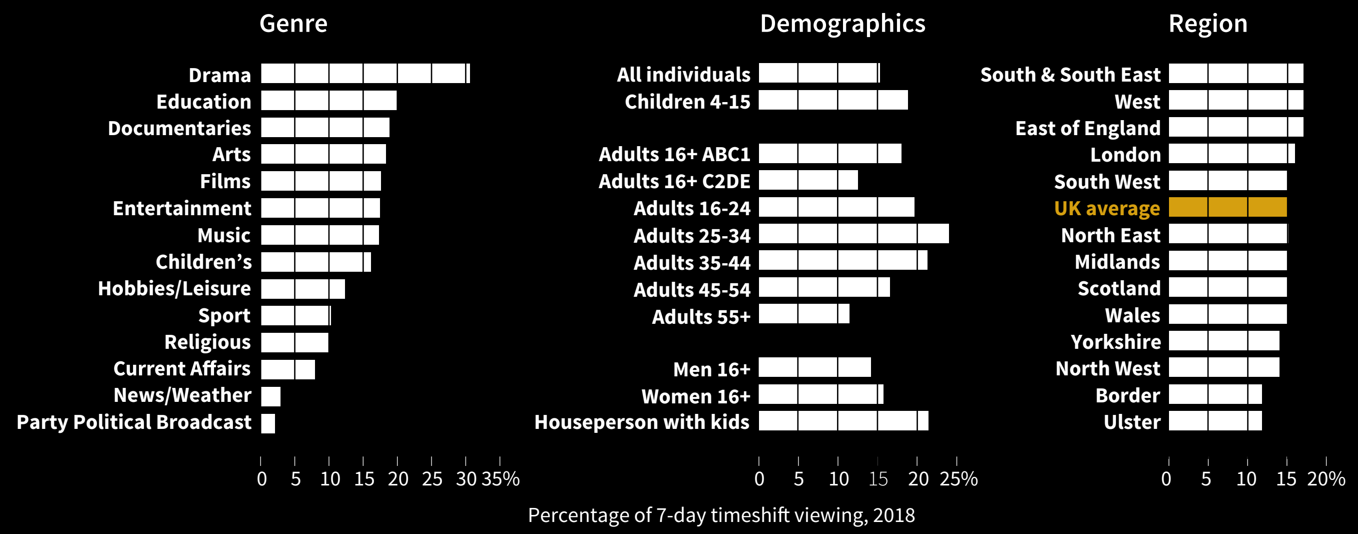
WE CONTINUE TO WATCH MORE TIMESHIFTED TELEVISION



Having grown more slowly in 2016 and 2017, timeshifted viewing increased by 0.9 percentage points in 2018, the highest growth in four years. This growth is likely driven by increased use of BVOD services.

In a year in which England performed well at a summer football tournament, we saw a sharper downturn in timeshifted viewing during the summer months than in odd-numbered years.

TIMESHIFTING BY...

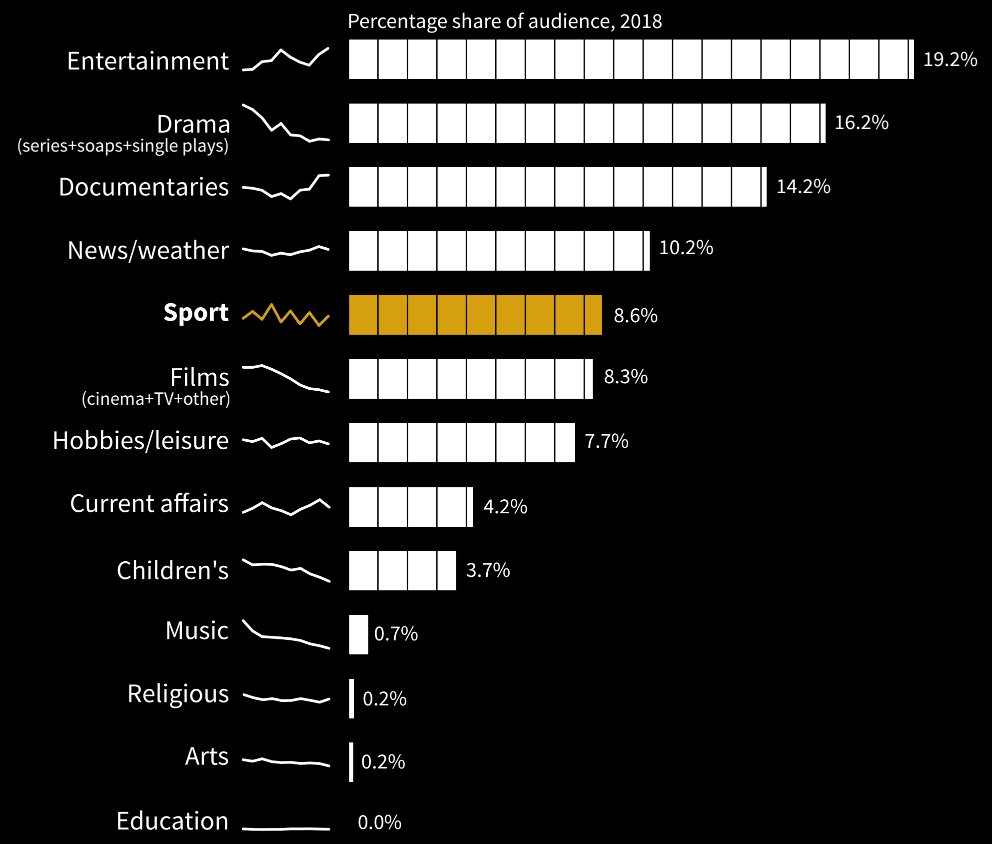


In 2018, drama increased its lead as the most timeshifted genre, with 31% of viewing timeshifted. Adults 25-34 and those in the South & South East continued to be the demographic and regions doing the most timeshifted viewing. Interestingly, those in the South West moved ahead of the national average for timeshifting, having been behind it during 2017.

Source: BARB

THE GENRE RANKINGS

Trend in % share of audience, 2008–2018



In 2018, sport enjoyed its bi-annual upswing to claim 8.6% of viewing – 1.5 percentage points higher than 2017. This was the biggest year-on-year gain for any genre in terms of share. However, in spite of England's strong World Cup performance, victory for Europe at the Ryder Cup and a Winter Olympics, this high was lower than the share achieved by sport in other even-numbered years in the last decade.

Entertainment enjoyed its highest share in a decade to take 19.2% of viewing. 2018 did not diminish the appeal of I'm a Celebrity, Strictly Come Dancing or Britain's Got Talent, among others. Viewers devoted a little less time to news and current affairs as a news agenda dominated by President Trump and Brexit took its toll. Children's programming continued to shed share – losing a further 0.4% to sit at 3.7% of viewing.

SPORTS STATS

In an even-numbered year, major sporting events attracted significant audiences

Sports fans were treated to a hearty diet in 2018, as Kelly Cates discusses on pages 6-7 of this report. The World Cup in Russia clearly delivered large audiences, but a less heralded event, The Winter Olympics from PyeongChang, also reached a significant number of viewers. Below we take a look at some of the broad differences between the two groups of viewers.

Winter Olympics reached*

44.1m

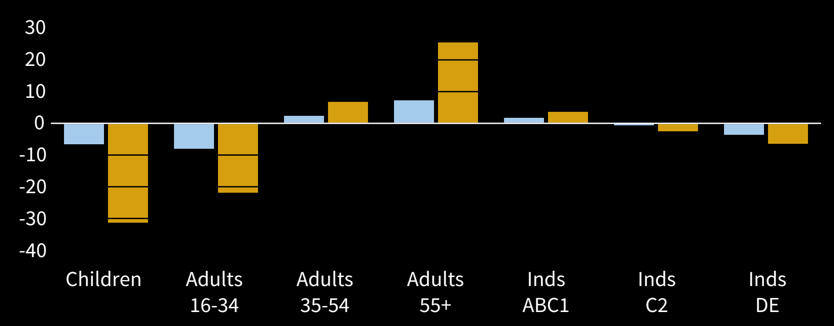
World Cup reached*

53.1m

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

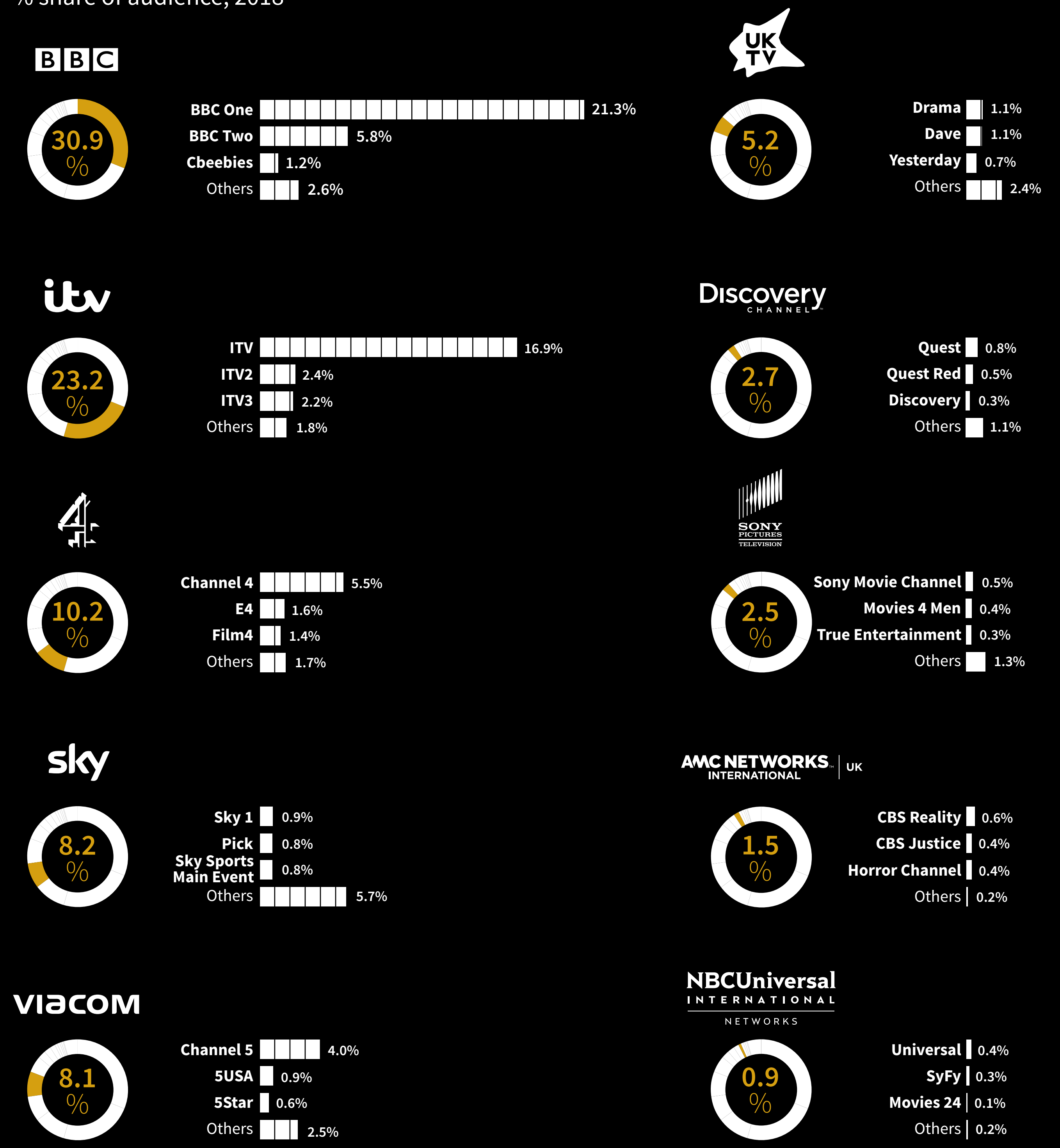
The Winter Olympics skewed significantly older, while the World Cup had a more even social class profile

Viewer index (against total universe)



Source: BARB

TOP TEN BROADCASTER GROUPS
% share of audience, 2018



The top ten broadcaster groups remain unchanged on 2017. Sky moved back above Viacom into fourth place, but the two are now only separated by 0.1 percentage point. Discovery climbed to seventh spot, having increased its share from 2.3% to 2.7% in 2018. The most significant change saw the narrowing of the gap between BBC and ITV. Standing at 9.9 percentage points in 2017, ITV closed the gap to 7.7 points by the end of 2018.

BARB TRAINING

Training module

BARB has launched a new training module on multiple-screen viewing to enable BARB customers to understand what new data are available and how they can be used. This module is available free-of-charge for customers. To access the training, visit:
barb.kineotrack.com/login/index.php

Training sessions: BARB Boot camp and Reboot

BARB also runs free training sessions for customers to help the media and advertising industry better understand the strength of the TV broadcast currency.

There are two sessions to choose from; one to support the emerging generation of media agency, broadcaster and advertiser talent, and another to advance the skills of those already established in the television industry.

BARB Boot camp gives you an introduction to who we are and what we do. It will take you through how the BARB panel is formed and how we measure viewing from panel households. It will also give you an insight into our plans for the future.

This is a great session for those who are new to the industry or want to brush up on the latest jargon and reports. To book places for you and your colleagues, or to organise a private presentation for your team, please contact Client Services Manager Sarah Mowbray: **sarah.mowbray@barb.co.uk.**

For those who already use BARB data but are curious to find out what more they can do, then we recommend our Reboot sessions. These sessions help you understand their potential, including how new developments will shape the future of the BARB service.

Reboot focuses on the following topics and questions:

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

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

Boot camp and Reboot sessions last 1-2 hours and are held at BARB's offices in central London. They are free and for BARB customers only.

If you have any questions or would like to know more about other reports from BARB, please contact **jessica.bromley@barb.co.uk.**

There is also plenty of information on our website, which includes further details about our plans for the future. In the About us section of our website you can also find contact details for all members of the BARB team.

To keep up to date with BARB and the latest reports, follow us on 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.

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