

Dovetail Boost Panel Invitation to Tender

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Appendix A: Specification

1 Introduction

- 1.1 Broadcasters' Audience Research Board Limited ("BARB") invites tenders from those wishing to act as a contractor ("Tenderers") to provide a boost panel ("the Service") that works alongside BARB's core panel. Tenders should be submitted in accordance with this invitation to tender ("ITT") not later than 31st January 2017.
- 1.2 BARB has prepared a final specification setting out its detailed requirements for the Service set out in Appendix A to this ITT (the "Specification").
- 1.3 A draft contract setting out the terms for the provision of the Service will follow by the end of November 2016.

2 Timetable

The tentative timetable is set below. Tenderers should be aware, however, that BARB reserves the right to vary the procurement procedure and timetable.

Issue ITT to Tenderers: 4th November 2016

Deadline for submission of bids: 31st January 2017

Independent testing of proposed solutions: March 2017

Evaluation of bid by BARB: March/April 2017

3 Commentary on the steps in the timetable

- 3.1 It is anticipated that the steps set out in the timetable will facilitate both BARB and the Tenderer fully understanding the requirements and concerns that the other may have as well as assisting BARB in ensuring that it receives the bids in the style, format and covering the subject areas it requires.

4 Further information

- 4.1 The procedure explained above is designed to enable both BARB and the Tenderers to better understand each other's requirements and aspirations and to facilitate informed negotiations between them. Any Tenderer seeking further information should put its request in writing to:

Justin Sampson, Chief Executive, Broadcasters' Audience Research Board Limited, 20 Orange Street, London WC2H 7EF (justin.sampson@barb.co.uk)

To enable such enquires to be comprehensively administered and for co-ordinated responses, all such enquiries will be dealt with via the Chief Executive's office in the first instance. Questions should be as concise as possible.

- 4.2 Tenderers should be aware that clarification of points raised by one organisation will, where BARB considers it to be appropriate, be made available to all Tenderers intending to respond to the ITT.
- 4.3 It is incumbent on the Tenderers to ensure that they have all the information required for the preparation of their response and that they satisfy themselves that they have fully understood this ITT.

5 The proposal

5.1 Each proposal must include the following:

- (a) an executive summary of the proposal of no more than two A4 pages;
- (b) a detailed description of the services to be provided, the plans for providing them and an explanation of how each of the requirements specified in the Specification is to be satisfied;
- (c) a detailed implementation plan for the pre-operational phase;
- (d) a detailed description of the proposed service levels, the method of monitoring them, the proposed redress for BARB in the event of failure to achieve them and the governance arrangements which will apply to administering the service level system;
- (e) details of the appropriate expertise and experience of those key personnel whom the Tenderer proposes to employ in connection with the Service;
- (f) a staff plan for performing the Service, indicating the grades and numbers of those grades to be employed to do so;
- (g) a list of any proposed sub-contractors and details of the obligations which those subcontractors are to perform with details of their staff;
- (h) a detailed description of the proposed arrangements for disaster recovery, such that a full set of audience data can be reported in respect of every day (without exception) of the term of the contract;
- (i) details of any comments on the Specification;
- (j) details of any issue of principle arising from the draft contract;
- (k) details of the Tenderer's proposals for those parts of the draft contract that remain to be agreed between the parties (such as the implementation plan, acceptance procedures, service levels, disaster recovery and exit management) and, if any variation of the wording of

the draft contract is proposed, particulars of the proposed variation and the reasons for seeking it in a marked up copy of the draft contract; and

(l) the information set out in paragraph 6.

- 5.2 Failure to address each and every requirement in paragraph 5.1 above may disqualify a proposal from further consideration. A simple statement that the requirements of the relevant Specification will be met is not sufficient.
- 5.3 Each proposal should also include all other information which would assist BARB in the evaluation of the proposal.

6 Tender

Each tender must include two clearly marked sections setting out the information and other matters required under the headings "General Information" and "Charges" as explained in paragraphs 7 and 8 (and having regard to paragraph 9) below.

7 General Information

Tenderers are to provide the following:

- 7.1 The full name of the Tenderer together with any trading name, its registered number, the address of its registered office and the address for communications under any resultant contract;
- 7.2 The names and business telephone numbers and other contact details of the Tenderer's representatives whom BARB may contact in connection with the tender;
- 7.3 Details of the Tenderer's technical ability and track record so far as relevant to the tender;
- 7.4 Audited accounts of the Tenderer for the most recently completed financial year (or draft accounts/management accounts if they are not yet available) and for the two preceding years;
- 7.5 A copy of the Tenderer's Memorandum and Articles of Association;
- 7.6 Details of the Tenderer's corporate structure and affiliations including details of any person holding more than twenty per cent of the equity share capital of the Tenderer or of any parent company of the Tenderer; and
- 7.7 Details of any financing arrangements required to fund the services to be provided.

8 Charges

8.1 The Tenderer shall provide details of its charges for performing the Service provided including details of how the charges may vary (if at all) according to whether the Tenderer provides other services to BARB, prices of any related goods, services and facilities, details of all charges relating to optional items (Tenderers are encouraged to offer additional, non-core services at separate prices), all discounts and all other relevant information, all such charges and prices to be shown exclusive of value added tax. Tenderers should, as far as practicable, include a range of charges and prices to cover foreseeable changes.

8.2 The charges should include:

- (a) set-up: all pre-operational items associated with the implementation of the Specification;
- (b) operational: all items associated with the provision of the Service, breaking out separately all optional items; and
- (c) exit: all items associated with exit management and delivery.

Costs attributable to any TUPE transfers (see below) should not be included at this stage.

9 Set-up costs, exit charges and specific project charges

9.1 Set-up charges will be performance-related by linking them to an appropriate quantitative measure at each milestone during the pre-operational period.

9.2 Tenderers should present details of the set-up charges in the tender on the basis that they will achieve all the relevant milestones.

9.3 With respect to any exit charges, the Tenderer should give the fullest possible explanation of how they are calculated and in what circumstances it is proposed that they should be payable.

9.4 Where the Tenderer has any proposals for specific projects or other services that would be available for BARB to call on as and when required, the Tenderer should give the fullest possible explanation of what they consist of and what charges would apply in respect of them whether by way of rate card or otherwise.

10 Delivery of proposals and tenders

10.1 The Tenderer must deliver the proposals and tenders in unlocked PDF format, free from password protection.

10.2 The proposals and tenders must be delivered in the form described in paragraph 10.1 to BARB at its address as set out above not later than noon on 31st January 2017. They must be

clearly labelled **Dovetail Boost Panel**. Late bids may be considered only at the absolute discretion of BARB.

- 10.3 Tenders are to be valid for a minimum of six months from the latest date for the delivery of bids.

11 TUPE

The Tenderers will be responsible for the consequences (if any) of any relevant transfer of an undertaking within the meaning of the Transfer of Undertakings (Protection of Employment) Regulations 2006 (the "Regulations") arising as a result of their provision of the Service. Costs attributable to any TUPE transfers should not be included in the tenders at this stage.

12 Interviews etc

- 12.1 After submission of any bid:

- (a) BARB may call for additional information from the Tenderer to clarify any matter arising out of the proposal or tender and may require interviews with its personnel;
- (b) BARB may call for further tests to be conducted on or in relation to any equipment or systems proposed to be used by the Tenderer in the provision of the Service, in which event the results of any tests shall belong to BARB;
- (c) BARB may call for consultations with the Tenderer with respect to any matters relating to the proposal and/or tender with a view to agreeing terms (subject to contract); and
- (d) BARB may in particular call for consultations with the Tenderer on the Specifications and the draft contract.

13 Agreeing final terms

- 13.1 BARB envisages that, following the evaluation of the bids, there will be a period during which it will seek to agree final terms with its preferred tenderers upon such terms and in accordance with such procedures as it may notify in writing to those concerned.
- 13.2 Tenderers should ensure that they have sufficient and sufficiently qualified resources in place to meet BARB's timetable requirements for discussion of final terms, best and final offer submission and contract signature should the Tenderer be selected for this purpose. Such resources should include any necessary legal support and personnel with authority or the appropriate delegated authority to agree terms on the Tenderer's behalf.

14 Confidentiality and IPRs

- 14.1 Except as otherwise provided in this ITT, BARB and the Tenderers shall not make each other's confidential information available to any third party, or use each other's confidential information otherwise than for the purpose of the procurement process contemplated by this ITT. Confidential information shall mean all information that is marked as or otherwise indicated to be confidential at the time of disclosure and includes the Specification, or which otherwise has the necessary quality of confidence such to import an obligation of confidentiality. To the extent that any aspects of the proposals submitted in response to the ITT are confidential, Tenderers should include them in a separate schedule to the proposals ("Confidential Schedule"). Financial information in a tender will be assumed to be confidential and should be so marked. To the extent that the Tenderer wishes information to be treated as exempt from disclosure under the Freedom of Information Act 2000 ("FOIA") if applicable it should designate that information accordingly by notice in writing to BARB.
- 14.2 Tenderers may disclose BARB's confidential information in confidence to their professional advisers. BARB may disclose the Tenderer's confidential information to its members, professional advisers, agents, contractors, affiliates and members of any BARB workstream as part of this procurement process for the purposes of researching, comparing, assessing and evaluating the Tenderer's submissions. Confidential information shall not include any information that:
- (a) is publicly known (except by breach of this obligation of confidentiality);
 - (b) is received from a third party, who is not under an obligation of confidentiality;
 - (c) is independently developed without use of, or reference to, the confidential information;
- or
- (d) is required to be disclosed in accordance with the FOIA or otherwise by law.
- 14.3 If the FOIA is applicable, then BBC and Channel Four (which are members of BARB) may be required under the FOIA to release information that has been disclosed to them whether the information is held by them or another person on their behalf. In the event that either of them is requested to disclose confidential information in accordance with the FOIA (if applicable) BARB will provide the Tenderer with prompt written notice of any notice BARB receives from them in respect thereof and, if it is feasible and reasonable to do so on receipt of any such notice, will seek to ensure that they consult with the Tenderer prior to determining whether to disclose the information and/or the timing, manner and content of disclosure.
- 14.4 BARB may require a Tenderer to enter into a more detailed non-disclosure agreement during the course of this procurement process.
- 14.5 All intellectual property rights (including copyrights, trade marks and database rights) that subsist or are capable of subsisting in this ITT (or any additional material provided to the Tenderer by BARB or a third party for or on behalf of BARB) (the "Material") are or remain the

property of BARB or the third party. The Tenderer may use the Material solely for the purposes of this ITT or as permitted by BARB during the procurement process in writing. Tenderers, by submitting a response to this ITT, grant BARB a royalty-free licence to use any material they provide for the purposes of researching, comparing and evaluating the Tenderer's submissions and otherwise for the purposes of this procurement process.

15 General

- 15.1 Whilst all reasonable endeavours have been and will be used to inform Tenderers accurately in the Specification of BARB's requirements, Tenderers must form their own conclusions about the methods and resources needed to meet those requirements. BARB accepts no responsibility for any assumption or estimate that any Tenderer may make as to such methods or resources or for the results of any tests that the Tenderer may obtain through the use by the Tenderer of any facilities or information made available by BARB in connection with the proposed tender or otherwise. BARB have no responsibility or liability to the Tenderers whether in contract, tort or otherwise for the content of this ITT and the Tenderers' participation in the process contained herein.
- 15.2 BARB reserves the right at any time to alter the timetable and otherwise vary or terminate the procedure set out in this ITT by notice in writing either given to all Tenderers of which it is aware or published in such manner and to such persons as BARB may think fit.
- 15.3 BARB shall not be liable to any Tenderer for any costs or expenses that the Tenderer may incur as a consequence of the Tenderer taking part in the bid procedure set out in this ITT including (without limiting the generality of the foregoing) any costs or expenses arising from any alteration of the timetable or other variation or termination of such procedure.
- 15.4 BARB does not undertake to accept the lowest bid or any tender that may be submitted to it in connection with the Service.
- 15.5 Nothing in this ITT or in any invitation or other communication passing between BARB and any person who submits or may submit a proposal or tender in connection with the Service with respect to the subject-matter of this ITT shall constitute a contract or any agreement or representation which is binding on BARB save for a contract made in writing by BARB pursuant to and in accordance with this ITT. Without prejudice to the generality of the foregoing, nothing in this ITT or any such invitation or communication shall constitute an agreement or representation that any contract will be made pursuant to or in accordance with this ITT or at all.
- 15.6 This ITT shall be governed by the laws of England and Wales.

Dovetail Boost Panel: Specification

Appendix A: Invitation to Tender

Overview

As part of BARB's remit to enhance the measurement of television audiences, BARB is looking to commission the setup and running of a device meter panel ("Dovetail Boost Panel") to be added to the current peplemeter panel of 5.1k homes. The Dovetail Boost Panel will provide a nationally representative sample boost to the current core panel.

The specification consists of three parts; recruitment, TV set meter panel set-up/management and router meter panel set-up/management. Suppliers are welcome to submit proposals for one, two or three parts. Those suppliers submitting proposals for the second and third parts must be able to provide a fully-functional meter for independent testing in March 2017.

The sample will be built according to the design as stipulated within the sample design framework. It will be nationally representative and reflect current regional reporting requirements. An installed sample overage must be supplied in order to provide a daily reporting sample of 10/15/20k households.

Please ensure that for each element a proposal is submitted, all specified options are detailed and priced separately.

The contract period will run to 31 December 2022 and may be extended by BARB for further periods of one or more years until 31 December 2024. Thereafter the contract period will continue until terminated by either party giving the other not less than two years' notice in writing expiring on 31 December in any year but not earlier than 2022.

Submissions, including all supplementary documentation, must be provided to BARB no later than close of play 31st January 2017. The BARB Executive will be available for Q&A sessions with potential suppliers during week commencing 5th December 2016. In order to be considered, suppliers must provide BARB with a working TV set meter and/or router meter by the end of February 2017 to test and interrogate in a private laboratory fashion during March 2017.

Submissions must include a comprehensive project plan that assumes contracts are awarded on 19th May 2017. BARB expects a parallel run to start on 1st July 2018 so that the new panel can go live on 1st January 2019. The Dovetail Boost panel must, at least, be balanced and representative at the start of the parallel run.

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PART 1

Recruitment for the Dovetail Boost Panel

Introduction

This section specifies the methodology and scope for the contract to provide set-up recruitment activity to build a representative panel of UK households to have metering equipment installed in order to measure broadcast and online viewing activity.

The aim of the set up recruitment activity is to build a reporting panel of 10/15/20k households within a 12 month panel set-up period. The panel will be balanced as far as possible to reflect the profile of the population of TV and/or broadband households in the UK. Guidance on overage levels should be discussed with BARB as part of the process of preparing tenders.

The aim of the set-up recruitment activity is to achieve a balanced sample of installed set meter households. Consequently, some over-recruitment of household-types where the drop-out rate is higher may be required.

1.1 Sample design, geographical coverage and fieldwork

The Dovetail Boost panel will cover the whole of the UK, i.e. England, Scotland, Wales and Northern Ireland, including the Channel Islands and Isle of Man.

Please provide costed proposals for 10/15/20k households for each of the 4 recruitment options specified below.

Option 1: Face-to-face nationally representative, stratified probability sample

The set-up recruitment sample will be a stratified probability sample of residential households. The sample may be stratified via geodemographic group, or other geographical classifications. Balance will be assessed against a range of demographic criteria, including a set of household-based control cells within region such as the following:

	UK TV HH profile %
Non White	9
White 16-24 Householder	3
White Non 16-24 Householder Pre-Family Set 1 TV set	6
White Non 16-24 Householder Pre-Family Set 2+ sets	5
White Non 16-24 Householder Young-Family Set 1 set	3

White Non 16-24 Householder Young-Family Set 2+ sets	5
White Non 16-24 Householder Older-Family Set 1 set	3
White Non 16-24 Householder Older-Family Set 2+ sets	11
White Non 16-24 Householder Post-Family Set 1 set	7
White Non 16-24 Householder Post-Family Set 2+ sets	15
White Non 16-24 Householder Inactive Set 1 set	16
White Non 16-24 Householder Inactive Set 2+ sets	18

The desired geographical distribution of the installed Dovetail Boost Panel is expected to be proportional to population on a regional basis. However, differential participation rates by region and demographic mean that the sample generated for recruitment will need to diverge from this proportionality.

Interviewers will be provided with pre-selected addresses. Demographic filters may need to be applied to the recruitment process within the questionnaire script.

The level of clustering permitted in the recruited sample will be agreed between BARB and the recruitment contractor. A restriction may be applied, for example, to the number of homes that may be recruited from a single Census Output Area, or set of adjacent Output Areas.

Interviews will be conducted face to face at the respondent's home address, using a CAPI or similar approach.

Fieldwork must be conducted to the highest research standards, and in accordance with all relevant legislation, the Market Research Society (MRS) Code of Conduct and other MRS regulations.

Every effort must be made to maximise contact rates and response rates, including varying the day and time of visits, plus making evening and weekend visits.

A minimum of four contact attempts must be made at an address before it can be regarded as a *non-contact*. Of these, at least one attempt must be made during a weekday evening (between 6 and 9pm), and one attempt during a weekend (Saturday/Sunday).

Addresses may be reissued if the contact rate is considered to be too low relative to an agreed service level.

An objective procedure must be specified to deal with instances where multiple households are found to exist at an issued address.

Recruitment material will be left with the household explaining what is involved in participation in the metered panel.

Within Wales respondents are entitled to ask for the recruitment interview to be conducted in Welsh. This may require a re-visit by an interviewer fluent in the language.

Option 2: Face-to-face nationally representative, quota sample

Face-to-face recruitment of a nationally representative sample of UK TV/broadband households with quotas applied for demographics and geo-demographics within region similar to that specified in Option 1. Whilst there is no necessity for generating pre-selected addresses with this option, some level of clustering restriction will need to be applied in order to achieve a balanced and representative sample.

Fieldwork must be conducted to the highest research standards and in accordance with all relevant legislation, the Market Research Society (MRS) Code of Conduct and other MRS regulations.

Recruitment material will be left with the household explaining what is involved in participation in the Dovetail Boost Panel.

Within Wales respondents are entitled to ask for the recruitment interview to be conducted in Welsh. This may require a re-visit by an interviewer fluent in the language.

Option 3(a): Face-to-face nationally representative, stratified probability sample PLUS RDD sample boost

This would require the same overall design as Option 1 only without the selection of potential recruits filter outlined in section 1.2 below. To balance the recruited panel, and make up for any shortfall in hard-to-reach groups, a RDD telephone recruitment boost would be used to top-up potential recruits. All recruited leads would qualify as eligible to recruit to the panel.

Option 3(b): Face-to-face nationally representative, quota sample PLUS RDD sample boost

This would require the same overall design as Option 2 only without the selection of potential recruits filter outlined in section 1.2 below. To balance the recruited panel and make up for any shortfall in hard-to-reach groups, RDD telephone recruitment boost would be used to top-up potential recruits. All recruited leads would qualify as eligible to recruit to the panel.

1.2 Selection of potential recruits (not required for Options 3a/3b)

The aim of the set-up recruitment activity is to produce a balanced panel of set meter households. To cope with differential participation across different demographic groups, it will be necessary to run a probability-based selection process to determine which households are attempted for recruitment.

The probability of a household being selected will depend upon the demographic or other segment in the population in which it sits. This will be determined by data collected from classification questions at the start of the interview, and/or by other known factors such as the household's geographic location or postcode.

The CAPI system therefore needs to be capable of supporting a probability-based decision-making process to determine which households will enter the recruitment process.

It is the responsibility of the contractor to design and maintain a matrix of demographic variables, and selection probabilities, for each panel control region, to govern this process. Data from the BARB Establishment Survey will be made available to inform this.

It is anticipated that the probabilities may be updated on a monthly basis during the panel build. The contractor must supply BARB with monthly updates on the matrix design and sample performance.

The decision to attempt to recruit a household must be made solely within the interviewing software. Interviewers must have no discretion over this, and it is not permissible for respondents to volunteer to join the panel on their own initiative.

The following sections apply to ALL Options

1.3 The recruitment interview

The recruitment process must be designed to maximise rates of recruitment and participation in the panel, while also ensuring that respondents clearly understand what is involved.

The interview must be carried out with a responsible adult in the home, such as the head of household or person responsible for household duties.

The recruitment interview must provide respondents with a clear understanding of what is involved in participating in the Dovetail Boost Panel.

This must include clear information on the need to measure all relevant devices in the household, and for every household member to consent to viewing data being collected.

The scope of BARB's TV audience measurement, and therefore the scope of the data to be collected, may include measurement of viewing of audio and video content consumed via TV sets and connected equipment, computers, tablets, mobile phones and any other device capable of delivering audiovisual content.

Every recruited household must provide at least one valid contact telephone number (landline or mobile).

At the respondent's request, the interviewer may return at a later time or date to complete the recruitment process.

Accurate demographic details must be collected for each household, including social grade.

It is vital that the recruitment interview collects accurate classification data, and there must be a facility to provide help and further information for participants (for example via the use of visual prompts or help screens within the CAPI script).

Staff managing the recruitment process must be highly knowledgeable about the broadcast and online TV market in the UK. Interviewers must be thoroughly briefed on the recruitment process and questionnaire, and about the variety of TV, computer and phone equipment in use in the UK.

The contractor is responsible for creating and maintaining the recruitment questionnaire and script, and must ensure that it remains up to date and relevant for its defined purpose. It is expected that the questionnaire will be able to be modified as often as required to ensure its continued relevance.

Changes to the questionnaire are subject to BARB approval.

1.4 Recruitment material

Supporting material must be produced to aid the recruitment process. This may include a video to explain how the panel works and what participation entails; as well as hard copy leave-behind documents or leaflets.

A dedicated website must also be set up to make this information easily available.

A telephone number that is free to call from either landlines or mobiles must also be available to allow for queries from recruited homes. An email address must also be available for responding to these queries. All contact details must be available on the dedicated website.

Interviewers may be given a replica of the metering equipment to show to prospective recruits.

Appropriate reference material explaining the panel task must be left with the recruited household. Or in the case of RDD sample, sent by mail to the respondent.

Recruitment material should be available in several different languages (at least four languages in addition to English and Welsh).

1.5 Validation of recruits

All face-to-face recruits must be followed up within a few days to confirm their agreement to join the panel, and that all household members are willing to participate. This follow-up must be independent from the field worker/interviewer responsible for the initial recruitment.

1.6 Provision of recruits to set meter/router meter contractor

Information on validated recruited households, including contact details and household and demographic classifications must be provided to an agreed specification via a secure process to the set/router meter panel contractor on a daily basis.

A CAPI or similar approach to interviewing provides an opportunity to check apparent inconsistencies in a respondent's answers during the interview itself, and it is expected that such checks will be carried out. There may also be a requirement for some subsequent editing or cleaning of the data collected to ensure that the final delivered data is consistent and usable.

Query handling and liaison with other BARB contractors: All queries or complaints from respondents regarding the recruitment interviews must be taken seriously and dealt with promptly and appropriately. BARB must be made aware of any serious complaints from respondents involving a breach of legislation or MRS guidelines.

To run the service successfully it will be necessary to develop constructive relationships and co-operate fully with other BARB contractors. Liaison between contractors will determine the most effective ways of working together and methods for data transfer.

1.7 Quality control reporting

Regular (monthly and quarterly) reports on fieldwork achievement will be provided to BARB.

The main purpose of these reports is to quantify response rates and enable objective assessment of the quality of the sample achieved.

QC measures will be monitored at national and regional level, and using other available classifications (e.g. geodemographics).

For recruitment potentials that are not recruited, data must be collected as to the stage of the recruitment process reached in each case.

1.8 Service levels

A high level of fieldwork performance is expected. Service levels will be applied to the performance of the delivery. Tenderers are asked to suggest service levels which may include the following.

- ▶ Contact rate
- ▶ Recruitment rate – overall and by demographic group
- ▶ Installation rate (the rate at which recruited homes are installed on the panel) – overall and by demographic group and by compliance: full installation (all TVs/devices)/ TVs only in non-broadband households/TVs only in broadband households/ router meter only in non-TV households.

1.9 Delivery schedule

We require a balanced and representative panel of installed households to have been recruited by 1st July 2018. Please provide costs and proposed schedule of delivery for the following range of recruitment options/household sample sizes.

Costs:

	Option 1	Option 2	Option 3a	Option 3b
10,000				
15,000				
20,000				

Delivered in (months):

	Option 1	Option 2	Option 3a	Option 3b
10,000				
15,000				
20,000				

Please indicate whether, and if so how, these costs and schedules would differ for recruiting a panel that is installed with; a) a set meter and a router meter, b) only a set meter, and c) only a router meter.

PART 2

Dovetail Boost Panel: TV set meter requirements

The sample design for this panel is described both in the overview on page 1 and throughout part 1 of the specification.

A panel of 10/15/20k in tab reporting homes to report daily following agreed and specified QC and panel management processes. All homes in the daily sample must have all TV sets monitored to an agreed standard, with accurate classification of household and individual demographics collected on an annual basis

Additionally, we would like to explore the possibility of installing router meters in all qualifying households (those with broadband). This is described in part 3 of the specification and may be proposed either as a stand-alone option or as an add-on to the TV set meter proposal.

2.1 Installation

The contractor is responsible for installing TV set meters (and router meters if a router meter solution is part of the proposal). Please specify the recommended means by which these meters will be installed e.g. professional technician, self-installation etc. If technician installations are recommended then this must be at a time convenient to the household and include evening and weekend appointments. If a self-installation method is proposed, then full details of the process, customer support and quality control procedures must be included in the proposal.

- ▶ Each installation must involve the configuration of a TV set meter to an agreed measurement specification (see meter capabilities in 2.2).
- ▶ All television sets in the household that are in working order and connected to the power supply must be measured, regardless of usage status.
- ▶ Any TV homes without **total** TV set measurement must be excluded from the sample.
- ▶ The installation must not interfere with the working or the capability of the TV set or TV set equipment in any manner.
- ▶ The installation of metering equipment must be tidy, neat, and in keeping with the environment of the panel home.
- ▶ All recruited households must agree fully to the measurement of their home, and written consent should be obtained confirming that all household members agree to the collection and use of their viewing data.
- ▶ Each set meter must be line tested to ensure correct capture and validation of viewing data to the television set.

- ▶ Following installation, all household details must be checked and panel members agreeable with the appearance and safety of the equipment.

There are two additional considerations for suppliers who are proposing a router meter.

- ▶ All broadband homes must be measured for all IP delivered broadcaster content. The router meter being installed in all qualifying households and *in addition* to set meters for those with TV set(s).
- ▶ Broadband-only homes (with no TV set) must be included in the router meter samples.

Further details of router meter requirements are described in Part 3.

2.2 TV set meter capability

- ▶ Each TV set meter must accurately capture TV set on and off across all television makes and models.
- ▶ The set meter must capture viewing to all BARB reported channels.
- ▶ It is envisaged measurement will be conducted via an audio fingerprinting technique to a specified granularity by the tenderer.
- ▶ The set meter must also have the facility to detect audio watermarks embedded within broadcaster audio. The audio watermark may be first-party to the tenderer, but the tenderer must also be willing to accept third-party licensed watermarks designated by BARB.
- ▶ It is desirable that platform or device source detection be part of the set meter measurement. This may be from a direct method or other derived mechanisms. The tenderer must outline their approach in their proposal.
- ▶ No person registration is required from the TV set meter measurement.
- ▶ TV set meter data must be collected and polled in real-time. This can be either via mobile networks or the household broadband connection, if available. The tenderer must outline their approach in their proposal and extent of incremental costs of real-time collection in comparison to current single polling window.
- ▶ Where viewing is identified via IP to the TV set, viewing data must be augmented to identify the source and or distribution method of the viewing.

2.3 Panel management & QC

- ▶ The tenderer must apply standard business rules for all data captured in order to designate an in-tab reporting sample for data production.

- ▶ Business rules, to be agreed with BARB must ensure only homes that fully and accurately capture all TV set activity are included in the sample.
 - The tenderer must outline business rules within their proposal to ensure accuracy of the sample.
- ▶ Set meter diagnostics must be regularly assessed to ensure no interference from panel members.
- ▶ Quality control procedures must be applied to identify outlier behaviours that may be a symptom of error in the measurement. These must include (but not be limited to), excessive channel or TV set viewing, nil TV set on, or nil TV channel viewing.
- ▶ Panel homes must be contacted at a regular interval in order to update panel demographic records. Multiple contact options must be applied to ensure regular update. Methods should include but not limited to, telephone, postal mail and email.
- ▶ All panel homes to receive a monthly participation incentive for taking part. Please detail proposed level of incentives.
- ▶ All panel homes to receive a regular newsletter including details of accrued incentives and how to redeem.
- ▶ The tenderer should outline in full their vision for panel management and engagement, taking into account changes in attitudes and behaviours.
- ▶ A household record file including active reporting status to be maintained.

2.4 TV set meter data processing

All TV set data must be collected for the polling day by 2am each morning. TV set data must be processed, and following editing rules, a full dataset of TV set records to the second granularity produced. Pre-imputation data must be made available to BARB.

2.5 Data production/imputation

TV set meter data for panel homes is transformed into person data through the application of BARB agreed probability models. This may be conducted by the contractor or a separate third-party data processor. Please provide costs and process for each of the following options.

Option 1: Contractor provides raw panel viewing files and household demographic data/reporting status to a third-party data processor appointed by BARB by 6am each morning

Option 2: Contractor applies algorithm supplied by BARB

Option 3: Contractor develops and applies algorithm. It is envisaged that probability models will vary over time and therefore maintenance of the models will be required. Please provide an additional price for a licensable algorithm that could be used by BARB in perpetuity.

For options 2 & 3.

- ▶ Ascription models, agreed by BARB are applied on a daily basis as part of daily production.
- ▶ The application of models will require interrogation and dissemination of the current full BARB peoplemeter data on a daily basis. Data will include but not limited to, daily channel and demographic audiences, as well as event based metadata relating to genre and series information required for accurate ascription. Please detail proposed process for receiving or accessing appropriate data in a timely manner to allow over-night reporting.
- ▶ TV set meter activity data must become individual viewing data, with panel member responses imputed to TV set meter statements. Genuine uncovered set viewing should be maintained in the new dataset.
- ▶ Where an error occurs in processing, the contractor must be prepared to re-process where necessary. The period of re-processing is not limited and is at the discretion of BARB.
- ▶ The full respondent level data file to be provided to Dovetail Fusion Contractor and BARB by no later than 9am* each morning. (*Time to be confirmed)
- ▶ It is envisaged that service level requirements will be applied to the performance of the delivery. The tenderer is asked to suggest service levels.

Part 3

Dovetail Boost Panel: Router Meter Option

Background

Project Dovetail incorporates BARB's intention to integrate panel operation with external census based data for online TV viewing. This is with a view to creating consistency between BARB's demographic panel audiences and site centric equivalents, and increasing the precision and granularity of BARB's audience analytics, such as cross-platform reach.

In this context, BARB is exploring how to capture the in-home viewing of panel members who have explicitly agreed to the monitoring and recording of activity on their connected devices including Smart TVs, PCs, laptops, tablets and smartphones. This part of the specification describes the ideal dataset and technology framework for monitoring the home networks of panel members who have explicitly agreed to such monitoring and whose demographics are known.

As a general principle, BARB expects interested contractors' proposed usage monitoring solutions to minimise disruption to these panel members. The technology must also be easy to maintain, configure and operate.

We recognise that alternative data or information may provide an adequate substitute to what is specified, and data may be usable in a different format, so some discussion of requirements is expected. BARB is not necessarily aware of the full potential of network monitoring systems and would welcome suggestions and advice from potential contractors and data suppliers.

The sample design for this panel is described both in the overview on page 1 and throughout part 1 of the specification.

3.1 Installation

BARB expects that the monitoring solution will involve a combination of hardware and software that may include an appropriately configured router. The contractor will be expected to provide the support necessary for the solution to be installed and maintained properly in panel member homes.

- ▶ Meters will need to be line-tested
- ▶ Authorised contractor staff must be able to make configuration changes remotely and securely.
- ▶ All broadband homes must be measured for all IP delivered broadcaster content. The router meter being installed in all qualifying households and *in addition* to set meters for those with TV set(s).
- ▶ Broadband-only homes (with no TV set) must be included in the router meter samples.

3.2 Device capabilities

The solution must enable BARB to monitor panel member activity in the home and capture high-quality information on this activity, i.e. *viewing statements*. The specific fields to be captured and expected data format are outlined in section 3.3 below.

3.2.1 Hardware and operational capabilities

The solution must be able to fulfil the following hardware requirements.

Discover and connect to, or replace, the panel member's home network

If the solution integrates with an existing network, perhaps by connecting to the household's existing router, it must self-discover and automatically connect to the network. The solution provider must assure that the hardware chosen is compatible with all reasonable implementations of home networks (ISPs, router versions etc.).

Capture identifiers of all devices that use the home network

All devices must be uniquely identified so that their own activity can be captured and isolated. The contractor must ensure that they are regularly updated with information about all the devices in the home, such as device type, main user and main streamer.

Store and upload the viewing statements logged when devices on the home network engage in viewing online.

The contractor must explain the process used to store and upload the viewing statements, in particular the frequency of upload, the expected traffic load on the monitored network and fail-safe mechanisms to cope with, for example, lack of network connectivity or malfunction in the monitoring system. Data must be uploaded with sufficient regularity to conform to the overnight processing specified in Section 3.3 below.

Quality control information about the uploaded viewing statements must be available for each day to enable evaluation of the quality of each household's set of viewing records. This must include:

- ▶ date and time when viewing statements were uploaded
- ▶ upload response codes (e.g. data collected successfully)
- ▶ logged technical faults (e.g. engineer visit requested/pending, service down in locality), and
- ▶ any other suitable information which confirms correct operation of the system and quality and completeness of data.

3.3. Data capture capabilities

Within each home, we need to understand viewing on a second-by-second basis, and therefore need to capture detailed information about the viewing sessions, also known as viewing statements.

These viewing statements will feed into the data processing and modelling system outlined in 2.5. Resulting data will be delivered to BARB's appointed contractors as part of Project Dovetail, which is designed to produce equivalent audience analytics to those available for the core BARB panel.

The data captured must therefore be converted to a format which is meaningful to allow for the processing outlined in section 2.5 to be conducted either by the supplier or BARB's data modelling contractors. The output must be a clean set of processed, edited statements. Tenderers are requested to provide a spec for the output file from their router as part of their submission. The following fields are a minimum requirement. This will effectively create a stripped-down version of the standard BARB Panel Viewing File for basic analytic functionality:

- ▶ Identifier of the device (each smart TV; PC/laptop; tablet and smartphone in the home)
- ▶ Where possible, identity of the owner/main streamer of the non-TV device so that devices can be mapped to individuals
- ▶ Identifier of the household
- ▶ Start date and time (to the second) of viewing session
- ▶ Duration of viewing session (to the second)
- ▶ Session identifier
- ▶ Type of activity (e.g. live streaming, on-demand play, download play etc.)
- ▶ Broadcaster content identifier of the content being viewed (if live, can optionally be replaced by channel identifier)

Any change of state, such as changing channels, must instigate a new session. Both programmes and commercials must be assigned content identifiers; advertising content identifiers must meet a known industry standard where available, such as the Clearcast clock number.

To fit with BARB's reporting cycle, the captured data must be made available overnight on a daily basis.

Broadcaster apps

The BARB analytics tags embedded into broadcaster players and detectable by a properly configured monitoring solution will already capture much of this information. The key requirement for the monitoring contractor is to provide a reliable link between this census analytics and the panel member household's devices using appropriate identifiers as specified above.

Other online video content

BARB's mission is to capture and understand the patterns of all viewing in the home. To this end, BARB is interested in additional information on viewing of online video on players and apps that are not yet tagged with the BARB analytics referred to above. Contractors are expected to outline how they will measure video viewing on such untagged players.

Some video players of interest communicate via the encrypted HTTPS (secure HTTP) protocol rather than simple HTTP. The solution provider must therefore:

- ▶ explain to what extent information about non-tagged players and, in particular, encrypted viewing can be captured;
- ▶ explain, if using technology that is claimed to see inside HTTPS traffic, the process used to BARB and obtain explicit agreement from panel members that these elements of their secured data flows can be recorded;
- ▶ demonstrate how it will reassure panel members that the scope of monitoring relates specifically to TV audience measurement only, explain the extent of monitoring to the panel member on request.