

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.