

BARB

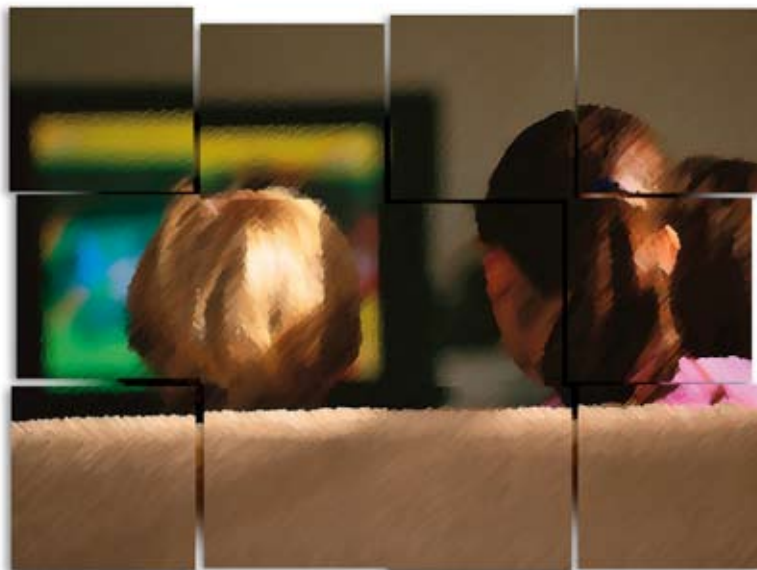
ISSUE 14
JUNE 2007

Bulletin

In this edition:

- ▶ "BARB Gold Standard" TV audience measurement data
- ▶ Expanded Programme Attribution and genre coding service
- ▶ Out-of-home viewing survey results
- ▶ Issue of invitation to tender for BARB contracts from 2010

BROADCASTERS'
AUDIENCE
RESEARCH
BOARD LTD





“BARB Gold Standard” TV audience measurement data

The BARB Gold Standard is the definition for any audience measure generated by applying the BARB defined calculation methodology and procedures to BARB audience data. It provides a set of figures that are the industry standard for the evaluation of television viewing and define the currency for trading commercials.

BARB'S Gold Standard calculation methodology encompasses a wide range of audience measures, such as minute ratings, audience reach, programme audiences, commercial spots and breaks audiences and reach and frequency calculations. All of this relies on data collected from BARB panel homes, as outlined below.

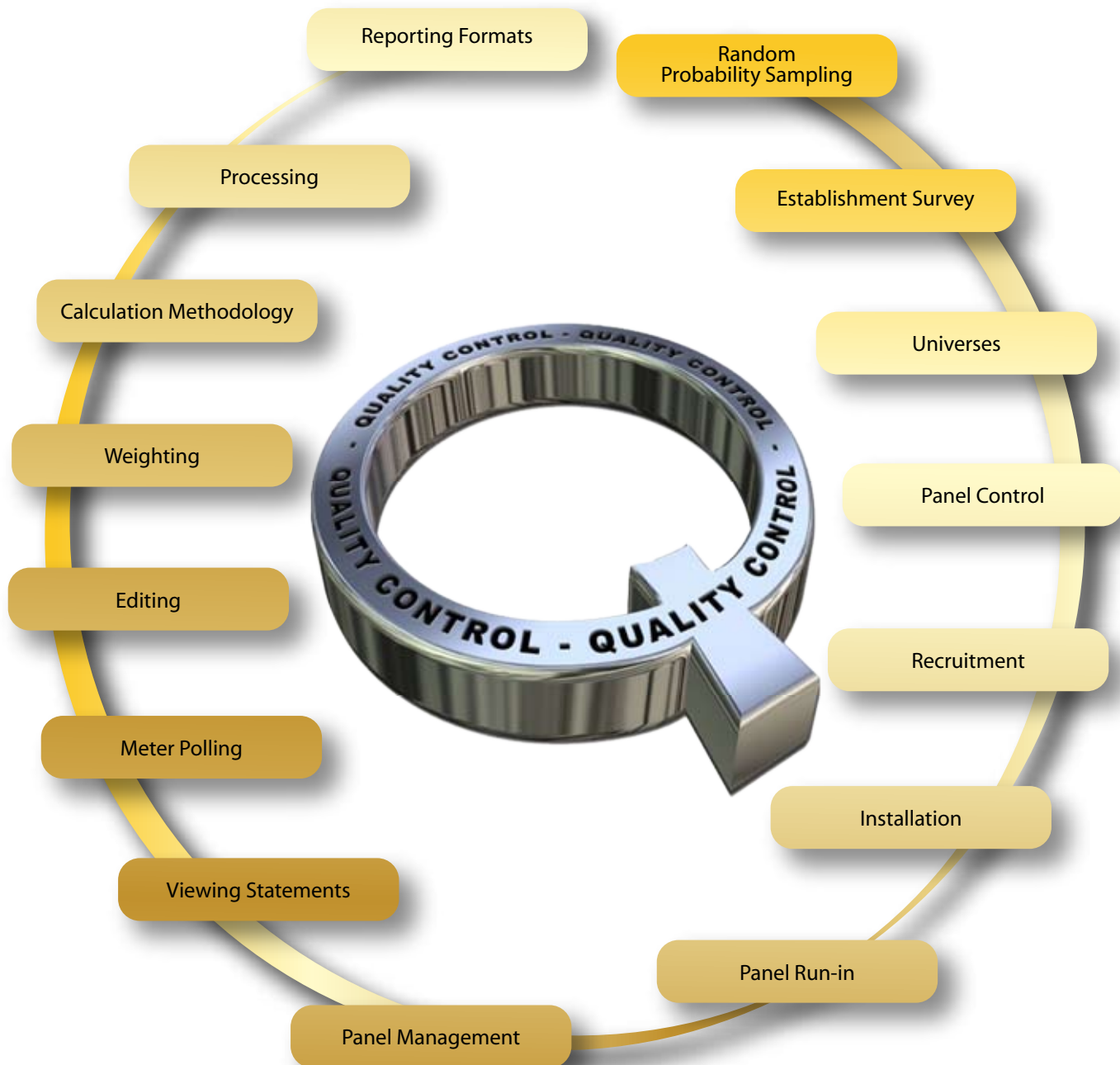
All BARB panel household residents and their guests register their presence when in a room with a television set on (the UK definition of television viewing). Each individual panel member does this by pressing the button allocated to them on each meter handset. An LED screen on the front of the meter reminds panel members periodically to register their presence if they have not already done so. Whenever a panel member leaves a room they de-register their presence. The metering system monitors all button presses made by each individual for each television in the home.

Panel members do not need to do anything else in order for BARB to capture all the viewing in their household everyday. Throughout the day the meter system stores all viewing undertaken by the entire household. Every night between 2am and 6am the data is automatically polled from every panel home.

Rim-weighting is applied to the panel data to incorporate numerous weighting and grossing variables before being released to the industry as “overnight” minute-by-minute television viewing data at 9.30 each morning. This includes any recorded material played back on the same day as the original transmission. This data is not the end of the process but this overnight data does provide broadcasters and all other data users with an immediate indication of how the previous day's programmes and advertising have performed.

PVR and VCR playback is subsequently reported if it takes place within 7 days of the original broadcast. This time-shifted viewing is added to the live and viewed-on-same-day-as-live data to produce the final, minute-by-minute consolidated audience, available 8 days after the original transmission date. This data becomes the “BARB Gold Standard” used by the industry to report and trade on.

Channels reported by BARB provide detailed timings of the programmes and commercials they transmit in their “as-run logs”. These records are then populated with the “BARB Gold Standard” minute-by-minute viewing data to produce the “BARB Gold Standard” audience estimates for programmes and commercials.





Expanded programme attribution & genre coding service

From the beginning of 2007, this service, operated for BARB by Ipsos MORI, has undergone a process of expansion. This increases the number of broadcasters defining genres for their programmes, in order to offer an enhanced service to the industry.

Most channels broadcast by BARB Underwriters: BBC; ITV; Channel 4; five and BSkyB, together with S4C have participated fully in the PAS service by providing genre and sub genre codes, in addition to programme attribution. BARB has recently been successful in an initiative to encourage broadcasters of other BARB reported channels to participate fully in the service. Since the beginning of 2007, eleven additional broadcasters with 75 channels (including +1s) between them have cooperated with the initiative, with more to follow. In total, the participating channels represent nearly 90% share of total TV viewing for all individuals 4+.

The Programme Attribution Service (PAS) and Genre Coding work in conjunction to provide a programme analytical service. Broadcasters can use an online facility to allow them to confirm the title of each programme and its assigned genre. This provides a search tool to give broadcasters access to up-to-date programme title and genre data and the names they have been assigned previously ("known as" names) to ensure consistency and continuity.

One of the tasks involved is completing the unmatched programme listing, whereby users select and complete unmatched programme listings for any outstanding transmission days. The search facility enables broadcasters to select and update "known as" names to delete or move. Online programme title amendments allow users to look up all their programmes in the database by PAS number, programme title, genre and/or channel and amend title and/or genre codes. There is an ongoing facility for amendments to be made. By this means errors, such as misattribution and duplication, that are unavoidable in the daily matching process can be identified and corrected.

BARB's aim is to provide a comprehensive service to benefit the whole industry by allowing broadcasters and agencies full analysis of programme genres across all broadcasters. This enhances the data available to other industry sectors, for example, programme producers and analysts, rights management companies and regulators.

Out-of-home viewing

BARB audience data currently include a partial estimate of out-of-home viewing, via the surrogate measure of guest viewing. This provides an estimate of viewing that takes place outside the viewer's own home but within another private household.

To get an indication of how much other out-of-home viewing takes place BARB conducts a separate survey using face-to-face interviews. People are asked whether they have viewed television outside their own home, where it took place and, for each location, to give an estimation of how much time they spent viewing there in the past week. The survey has now run across 4 time periods giving an aggregated sample base of around 17,000 adults.

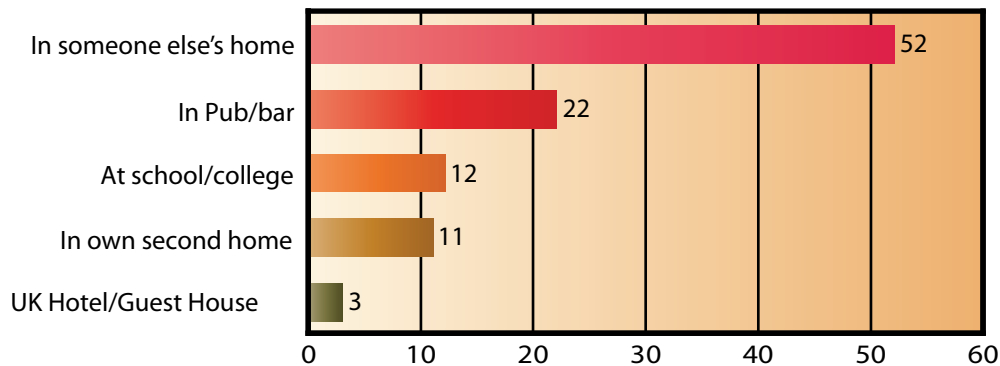
Percentage of Adults watching...	Past Month	Past Week
Any location	48	33
In someone else's home	33	22
In Pub/bar	15	8
At Work	5	4
In own second home	2	2
At school/college	2	1
UK Hotel/Guest House	5	1

Source:
Ipsos Capibus, May/Jun 2005, Nov 2005, Jun/Jul 2006, Nov 2006

Just under half of adults claimed to have watched television outside their own home within the past month, with 33% doing so in the past week. By far the most common location for out-of-home viewing was someone else's home where 22% of all adults said they had watched in the past week, followed by a pub at 8%, with relatively small proportions watching in other locations

The bar chart below shows the split of out-of-home viewing time by location. Around half of total out-of-home viewing hours were claimed to take place within someone else's home, while pubs account for 22% and other locations account for 26% between them. This suggests that BARB audience estimates currently account for about half of all out-of-home viewing.

Out-of-home Viewing Percentage Share by Location



Source: Ipsos Capibus, May/Jun 2005, Nov 2005, Jun/Jul 2006, Nov 2006



Issue of invitation to tender for BARB contracts from 2010

BARB has entered the second stage in the procurement process for new research contracts required from 2010. Seven separate companies have been issued invitations to tender.

Twenty-four proposals from twelve different organisations were received in December 2006 for the first stage of the process - the 'request for proposals'. Final tenders are anticipated to be received in July 2007 and new contracts are expected to be awarded at the end of the year.

Suppliers are being encouraged to continue to develop their proposals to ensure that the BARB service remains progressive. BARB has been and will continue to be actively assessing the feasibility and integrity of proposed techniques, including lab testing where appropriate. BARB also plans to field test some elements in the coming months.

Bidders are expected to demonstrate an ability to respond to the changing media landscape, such as providing the option to report and track non-linear content and to offer flexibility for the future. Maximising respondent participation is a key requirement.

As a primary goal BARB is seeking to cover televisual content wherever it is consumed within the home including, if feasible, via PCs and transportable devices. Quality control, functionality, continuous provision of service and appropriate methodologies are fundamental elements.

BARB intends to commission a service that ensures that "BARB Gold Standard" measurement - the industry standard - retains its current high regard and currency status.

Digital switchover is scheduled to complete in the early years of the new BARB contracts and needs to be considered by the successful suppliers. The service must reflect analogue and digital worlds at the start of the contracts and the progression towards a digital-only world.

If valued by the UK industry, approaches may be engaged which enable out-of-home viewing to be captured as a possible additional goal.

BARB

We always encourage feedback, so do tell us what you think
BARB, 18 Dering Street, London W1S 1AQ
Telephone: 020 7529 5529 Fax: 020 7529 5530 www.barb.co.uk