

BARB

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Bulletin

In this, the first BARB Bulletin of 2008, we provide analysis from the BARB Establishment Survey about television set ownership and digital penetration. The award of the BARB Contracts to take effect from 2010 is highlighted and we signal updates to the “BARB Since 1981” section of our website.

- ▶ TV Sets and Digital
- ▶ BARB Awards New Six-Year Research Contracts
- ▶ Website Update – “BARB Since 1981”

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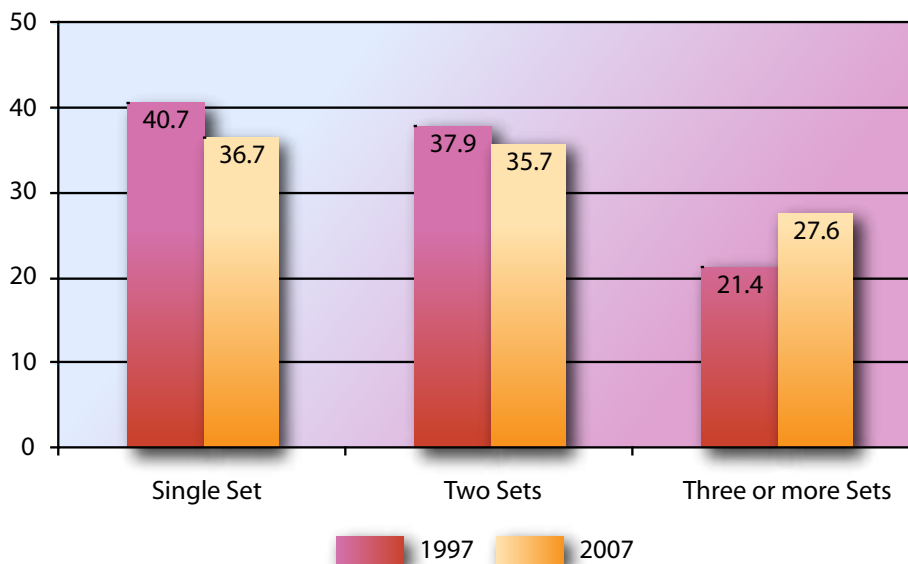


TV Sets and Digital

The BARB Establishment Survey provides data on the ownership of television equipment within, and demographic composition of, UK households. The data are used as a base for projecting universes and provide targets for panel control and weighting. The survey is carried out continuously across a sample of approximately 52,500 households annually.

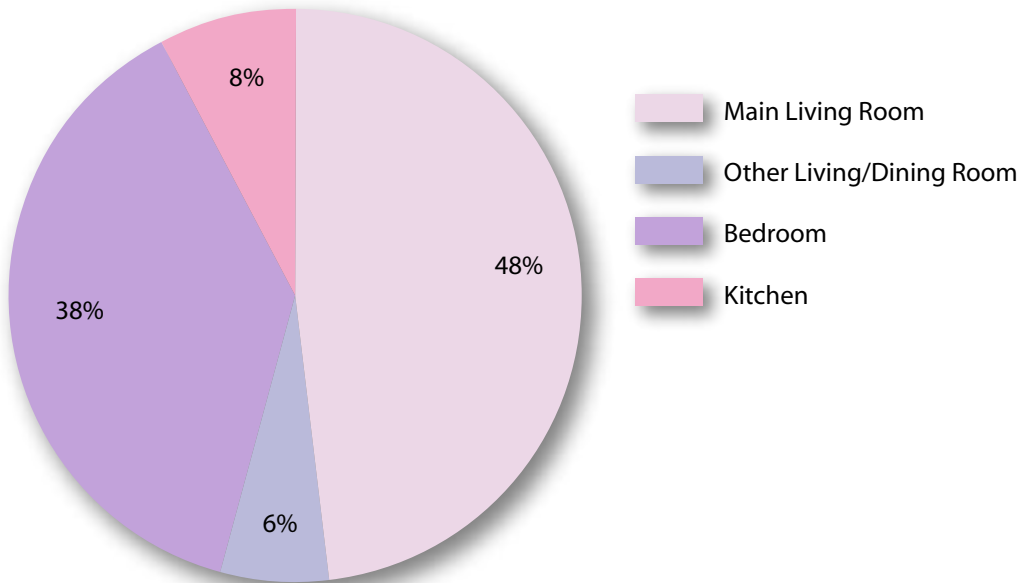
Main results from the survey are published in annual reports. These are available to all BARB subscribers and can be downloaded in pdf format from the BARB website. Chart 1 shows the proportion of television households owning one, two and three or more sets. Growth in 'multi-set' homes has slowed in recent years but there has still been a noticeable increase in the proportion of homes with three or more sets, to 27.6% in 2007, up from 21.4% ten years previously.

Chart 1: Proportion of TV Households with 1/2/3+ TV Sets



More detailed analysis of Establishment Survey data can be carried out via electronic data files, published quarterly. These enable analysis at the level of Individuals, Households and TV sets. Examples of an analysis of TV sets are shown in Charts 2 and 3.

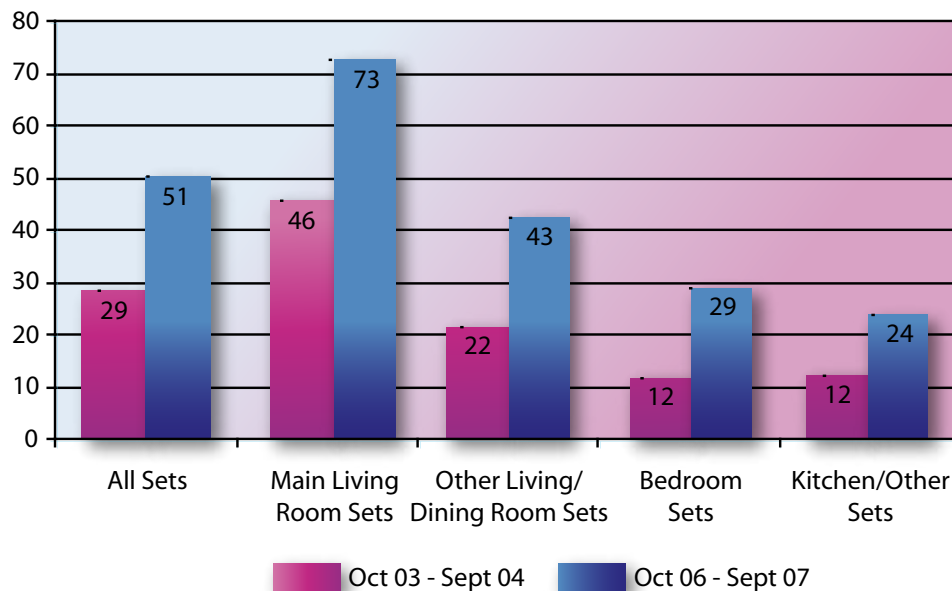
Chart 2: Location of TV Sets



The vast majority of main TV sets within the household are located in the main living room but the rise in multi-set homes means that sets are increasingly found in other rooms as well. As a result, as Chart 2 shows, main living room sets now represent less than half of the total TV sets found in private homes and there are a large number of secondary sets in other locations. As digital switchover progresses it will be interesting to see how many of these secondary sets are converted to receive digital.

Chart 3 shows the dramatic growth that has already taken place in digital sets over the past three years. It shows the proportion of sets able to receive digital, by the location of the set in the home. Averaged across October 2006 to September 2007, results from the Establishment Survey showed that 51% of all sets received digital, up from 29% in the equivalent period three years before. Over the same period, 73% of main living room sets received digital and it is hardly surprising that these sets would tend to be the first within a home to go digital. In other rooms a much lower proportion of sets were digital but in all cases there had been substantial growth across the three year period.

Chart 3: Proportion of TV Sets Receiving Digital





Award of Contracts for the BARB Service from 2010

We have entered into four new research contracts to provide the basis of the BARB service from 1st January 2010. The contracts will run for six years, to the end of 2015, with an option to extend.

Our aim has been to devise a system that will service current industry needs while being adaptable to the demands of a new decade of television.

A contract for survey design, quality control & calculation methodology has been awarded to RSMB - taking on an increasingly future facing role to consider new televisual distribution routes.

A second contract, covering the BARB Establishment Survey, has been awarded to Ipsos MORI which will survey the characteristics of the television owning population and include an element of direct recruitment to the viewing panel. The survey's specification has been upgraded to ensure that it remains at the forefront of research practice.

The third contract, awarded to TNS, is a recruitment function to establish and maintain the new BARB viewing panel. This is the first time that BARB has awarded a separate contract dedicated to panel recruitment.

The fourth contract covering meter panel installation, data retrieval, processing and audience reporting functions has also been awarded to TNS.

RSMB and Ipsos MORI hold similar contracts in the current service. TNS previously operated the BARB Panel prior to 2002, when AGB Nielsen Media Research (formerly ATR UK) commenced provision of the service.

Our requirements have been developed in consideration of the extent of the growth of time-shift viewing, which will require additional processing capacity. BARB already reports playback from VCRs, PVRs and DVD Recorders and will extend this to encompass selected pieces of content available for on-demand consumption via TV sets. A new non-linear viewing database, for periodic issue, is expected to be introduced to include this and time-shifted viewing beyond the 7 days included in the main BARB databases.

For the commencement of the new contracts, BARB has committed to a fixed meter approach – but the contracts have been structured to allow new techniques to be introduced if warranted. In consideration of extending the scope of the service we will be further testing some new techniques, such as software and wireless meters, to assess their potential acceptability. At this stage they have not been proven sufficiently to BARB to be able to contribute to the base service for the industry.

There are a number of potential solutions for monitoring viewing via PCs, some of which could be extended to laptops and transportable devices. We expect to trial this with both fixed meters and software metering and, if successful, will consider rolling out the functionality to the full panel.

We have an option to test an innovative approach to wireless metering which combines the TNS Fixed Meter, to which BARB is committing for its base service, with the PPM (Portable People Meter) from Arbitron. If this is proven to BARB's satisfaction then a range of possibilities could open up to extend the range of viewing capture.

The sample design of the new service is based upon the UK as a whole, rather than constructed from overlapping regions, as currently. This will bring benefits to panel design and provide an increase in effective sample size, being more representative of the distribution of the UK population. Regional reporting will still be facilitated and regional controls will continue to apply. Whilst the BARB viewing panel sample size remains at 5,100 homes, statistical benefits will result from the design improvements.

In the lead-up to the award of contracts for 2010, system requirements were discussed with the industry prior to the launch and at key points throughout the tendering process. BARB's 'blueprint' (launched in 2006) remains the concept for the structure of the service, with modular elements able to be incorporated as techniques become proven and if the industry determines such additions to be beneficial.

The process has been thorough and extensive, involving consideration of new approaches and ideas. It has included examination of methodological approaches and evaluation of tenderers' submissions, including (where relevant) demonstration and lab tests, consultants' evaluations, field tests and an understanding of any requirements for broadcaster implementation. Metering equipment has been successfully tested in laboratory and home environments.

The set-up process has commenced and we expect to start building the new panel in the second half of this year. It is planned to test the functionality of the system from the beginning of next year and have the new panel completely installed and operating in parallel with the current reporting panel during the second quarter of 2009 - in preparation for "go-live" from January 2010.



"BARB Since 1981"

New information is available in this section of the BARB website to bring it up to date with the end of 2007. This includes the top 10 programmes for the year, a complete list of BARB reported channels and notable BARB and TV industry events and milestones.

BARB

We always encourage feedback, so do tell us what you think
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