

BARB STRATEGY STATEMENT

TOWARDS THE NEW DECADE: DEVELOPMENT PRIORITIES FOR BARB

PROTECT THE CORE SERVICE

- BARB will continue to ensure the integrity of the core service on current and new panels, and will not take any actions in R&D which are likely to pose a risk to this. This is in order to maintain integrity & clarity of existing BARB data, to maximise respondent participation rates, and to ensure 7 day timeshift consolidation remains as the core service (whilst continuing to monitor the extent of post-7 day playback).

DEVELOPMENT AGENDA DRIVEN BY 'BROADCAST' CONTENT

- The BARB2010 Service plans to incorporate a separate 'pilot' non-linear database – to enable additional reporting of content which falls outside the core BARB output. 'Recently broadcast' material which is anchored on a "recent" transmission (number of days to be defined) is planned to be included, as is other content which is "from the archives" (subject to the BARB contractor being supplied with materials required for monitoring). Initially this will relate to material viewed on a TV set.

R&D FOCUS: PROBING FEASIBILITY TO EXTEND MEASUREMENT

- BARB will continue to seek to find the means of detecting and reporting content viewed on PCs & laptops. The focus will be on establishing a small test 'hothouse' panel to confirm the ability to report PC/laptop viewing. At present, BARB is concentrating attention on these devices. Results of such further testing will determine feasibility of extending BARB measurement to incorporate such viewing.

SEEK TO USE PANEL OUTPUT TO ENHANCE SERVER DATA

- The successful discovery of a technique for PC/laptop measurement from a panel would open up the possibility to generate people oriented estimates for webTV viewing – with an aim to provide some colour to the larger quantities of server data representing 'machine connections or requests'.
- The methodological work required is likely to be informed by an investigation into how BARB data can be applied to Return Path Data.

REVIEW PROPOSITIONS FOR THE SMALLEST CHANNELS

- BARB intends to consult with key operators from smaller stations and from advertising agencies - to see if options that can be constructed could offer some greater level of satisfaction to such channels (with reference to trading etc.). This may include the development of an entry-level 'BARB-Lite' dataset for the very smallest channels, based on periodic averages (e.g. 4wk, Qtr, 6mth).

COMMUNICATION OF BARB2010 SERVICE

- The programme to communicate the nature and key features of the BARB2010 Service to stakeholders will be developed. This will aim to ensure that there is knowledge across different sectors of the industry about what is and is not included in the BARB2010 service, and changes in panel design and reporting geography.

BARB INVESTIGATIONS AND DEVELOPMENTS IN RECENT YEARS.

In recent years, BARB has continually sought to consider the future potential needs of the measurement of TV content. This has led to programmes of R&D in order to examine new potential measurement techniques as they have become available, to develop views on the nature and scale of possible future influences, and conceptual thinking regarding the measurement challenges of the future and options for methodologies, systems and approaches. Listed below are some of the activities that BARB has undertaken in R&D in recent years, including highlighting where this has led to **developments and enhancements in reporting**, or other **material published for industry information**.

OVERVIEW OF BARB R&D ACTIVITIES 2005-2009

• '05/'06/'07/'08/'09	<u>Tracking study of OOH / Mobile / Web TV, (via Ipsos MORI Capibus)</u>
• '05/'06: Sky+	<u>Continuously reporting TSV via Sky+ since March '06</u>
• '05/'06: Unitam meter testing	<u>New TV meter rolled out in 2006 to commence DVR reporting.</u>
• '05: RAJAR 2005 Tests:	Eurisko, PPM (Share in compliance data)
• '05/'06 (updated '08/'09)	<u>Future Scenario Forecasting</u>
• '06: Eurisko Test:	Small scale verification test (live viewing only – TSV not available)
• '06: BBC/others	Interactive barcode test
• '06/'07: Mobile	Prototype mobile phone viewing experiment
• '06/'07/'08: BARB/RAJAR	PPM Panel
• '06/'07/'08/'09: BMWG	Involvement in Broadband Measurement Working Group, with ABCe.
• '07: PPM	Verification tests
• '07: New Portable Meter Tests	Small scale verification tests
• '07: Fixed Meter Tests	Part of BARB2010 procurement process
• '06/'07/'08/'09: VOD	Assessment & protocols, <u>Catch-up VOD via DCab incl. (Dec '08).</u>
• '07/'08/'09: HD	Protocols determined, <u>first HD channel reported from May '08.</u>
• '08/'09 Freesat:	Exploratory discussions regarding measurement options.
• '08/'09 Sky Anytime:	<u>Catch-up VOD via Sky Anytime incl. in channel viewing (Jul '09).</u>
• '08/'09 Canvas	Exploratory discussions regarding measurement options.
• '08/'09 Web TV	Software Meter tests to address web tv viewing.

BARB PROGRESS TO DATE ON R&D FOR WEB TV STYLE CONTENT.

In relation to viewing via the web to TV style content, several metrics are already available that enable organisations (e.g. broadcasters) to have some appreciation & understanding of their own services - but they relate generally to: requests, or 'streams started', and to machines that these requests have originated from, or to which the streams have been delivered.

BARB is and has been seeking solutions that go beyond this - particularly being able to add a duration element (for amount of viewing), and a people element (relating to who is viewing).

A number of techniques have been tested, but BARB has not yet been able to confidently identify one that performs in the desired way. BARB's goal is to progress beyond the other existing types of measure, not merely to replicate them.

BARB necessarily has to take a considered approach - and is concerned about whether a technique could affect current BARB measurement (for example impacting respondent participation rates) - and obviously retaining the quality of the existing BARB measurement is a high priority.

If the techniques that are currently on BARB's radar cannot be proved to deliver to requirements, then alternative forms of approach may have to be considered.

It's a priority for BARB to extend capabilities of measurement to enable the reporting of viewing via web on PCs and laptops. A great deal has been examined in recent years - but it would be a disservice to the industry if something was introduced into BARB measurement before being fully tested to the point of bringing confident, positive conclusions.

BARB is aware of, has evaluated, or is still considering, the features of several techniques, including:

- Identifying traffic into modems (a non-content specific measure, but which purports to identify the supplying site and the volume of video material)
- Various software meters (tracking activity on a PC)
- User online log-in techniques (which purport to track media player actions)
- Meters applied to PC soundcards (to match back the audio of the content - similar to some current detection methods)
- Server data (and what may be able to be tracked via this route - through the work of the Broadband Measurement Working Group in collaboration with ABCe)

They all have many 'promises' but the 'provens' have been more difficult to establish and BARB continues to pursue as much clarity as possible about the various techniques. It is hoped to roll a test technique into a small test evaluation panel soon (for which we are currently building a bank of potential respondents). Progressing with this intention is dependent on more confidence that a technique is fully developed, proven and available for use.

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