BARB Consultation Feedback

FUTURE INTO VIEW

BARB's Future Into View Consultation was launched in June 2005 to receive feedback from the industry. A key aim in our consultation was to ensure that we're fully in touch – as the most effective system to serve the industry will be influenced by relevant views.

At the outset, we declared a desire to develop a picture of priorities and expectations for the future of the industry - how television itself is changing, which elements may be considered most important for the future, and how BARB should respond to those factors.

The consultation has taken a number of forms - the major phases being the initial on-line response mechanism, and then group forums and depth interviews that were undertaken during the autumn of 2005.

There has been an overwhelming positive response to the process, in terms of willingness to participate and at the notion of BARB 'opening its doors' to receive input. The doors having opened, we continue to encourage input from throughout the industry, as BARB further develops its plans.

Hundreds of responses have been received from representatives of almost 100 organisations connected with television and advertising (organisations from which participation was received are listed later in this document). The respondents ranged across disciplines and organisations – from research to media buying, and from programme makers to advertisers.

The input has been valuable: some of it simple reality checks on perceptions of the current service, along with other more detailed insights into how some wish the service to develop.

There is widespread agreement that technological change will dramatically impact the future generating a very different landscape for all, though there is great uncertainty over the speed of any change. It is clear that BARB should demonstrate that we have a handle on the future, and that many across the industry would like BARB to chart a clear path forward. Indeed some views have suggested BARB could be a potential leader to help the whole industry to navigate the future.

BARB's Gold Standard is highly respected and there is a strong belief that the role of BARB as a central body responsible for television data across platforms is really important. Even if our chosen path doesn't match all ambitions it seems there will be respect for a BARB service with clear objectives.

In some quarters there is nervousness of change, yet a recognition that in the developing television environment the challenges of audience measurement mean there may have to be some new ways of operating, possibly breaking out of current comfort zones.

We're happy to receive further input, and we're still working through the options open to BARB, but this document is intended to share what the industry has shared with us, and to outline our continuing work programme in defining the future shape of BARB.

Bjarne Thelin
Chief Executive, BARB

Consultation Responses

The following summarizes views expressed in the on-line consultation responses, group forums and depth interviews.

Note: charts which illustrate some of the issues are compiled from the on-line consultation responses only and may not be fully reflective of all views received.

KEY:

STRONGLY AGREE | AGREE | NEITHER AGREE NOR DISAGREE | DISAGREE | STRONGLY DISAGREE

Out-of-Home Viewing

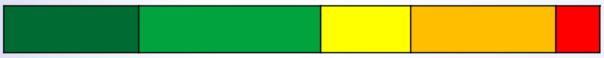
There is clear interest in the phenomenon of out-of-home viewing – perhaps not so much in terms of what is currently represented, but in terms of what it may represent once the new mobile viewing opportunities develop. There is great uncertainty over how important it will be, but a clear call for more knowledge in this area.

TO WHAT EXTENT DO YOU AGREE OR DISAGREE THAT OUT-OF-HOME VIEWING SHOULD BE PART OF BARB MEASUREMENT?

A Separate Measure for In-Home Viewing

Regardless of whether the BARB service extends to incorporate more out-of-home viewing (the biggest single element – that of viewing in other peoples homes - is already included in the BARB 'guest viewing' figures) there is a desire for the measurement of in-home viewing to be as complete as possible and to be the key priority for BARB to concentrate upon. The experience of viewing in-home is felt by many to be dramatically different from viewing out-of-home and that it should be separately quantified.

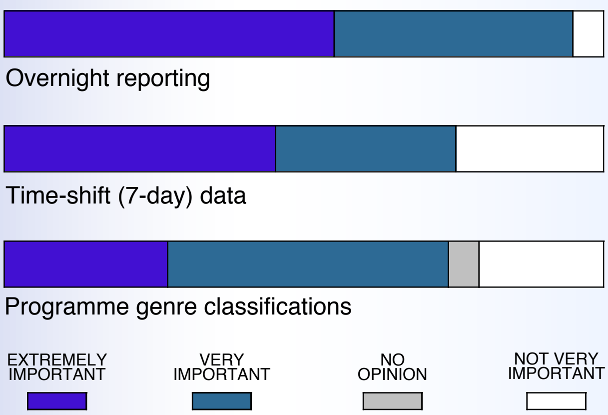
TO WHAT EXTENT DO YOU AGREE OR DISAGREE THAT MAINTAINING A SINGLE MEASURE FOR IN-HOME VIEWING SHOULD BE PART OF BARB MEASUREMENT?



Overnights, Time-shift Data and Programme Genre Classifications

The current BARB services of providing overnight data, incorporating 7day time-shift viewing, and maintaining programme genre classifications were overwhelmingly affirmed as positive attributes of the service.

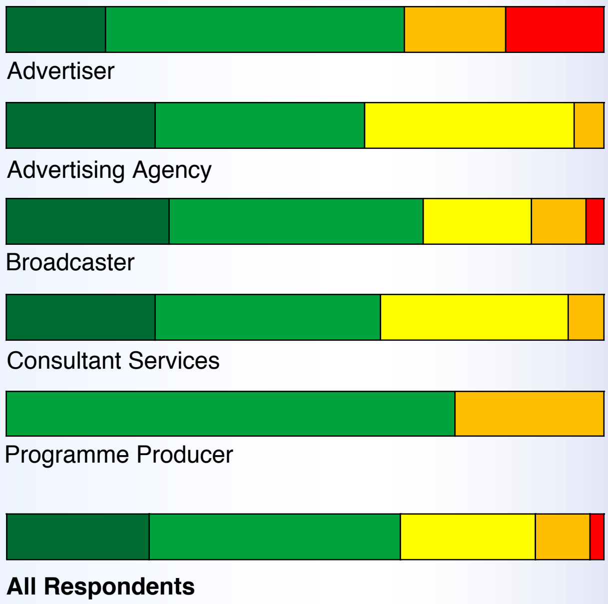
HOW IMPORTANT DO YOU CONSIDER IT IS THAT BARB SHOULD CONTINUE WITH:



An Alternative Measurement for Smaller Channels

There was overall support for developing measurement for smaller channels due to the reality of more variable figures caused by smaller audiences. BARB had outlined a possible approach of generating 'official' 4 week averages for channels which would be less dynamic and more stable. This approach was encouraged by a number of respondents – although some other suggestions have been put forward, and some respondents were opposed to the approach. Options from BARB will stimulate the debate.

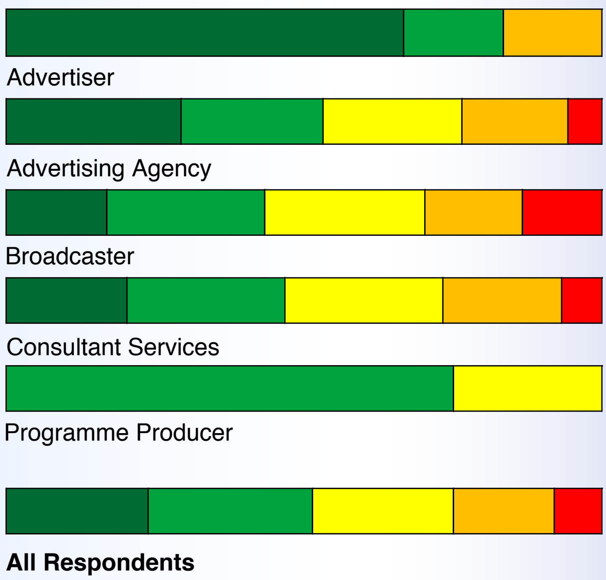
TO WHAT EXTENT DO YOU AGREE OR DISAGREE THAT AN ALTERNATIVE MEASURE FOR SMALLER CHANNELS BE PART OF BARB MEASUREMENT?



Single-Source Multi-Media Measurement

There were strong opinions on both sides with regard to the incorporation of other broadcast media measurement within a single-source service. Overall there was great interest in this concept and a yearning for knowledge of whether techniques could suitably deliver this as a realistic working proposition.

TO WHAT EXTENT DO YOU AGREE OR DISAGREE THAT IT IS IMPORTANT FOR BARB TO INCORPORATE OTHER BROADCAST MEDIA MEASUREMENT WITHIN A SINGLE-SOURCE SERVICE?



Changes in TV Trading

On the whole there is a belief that the trading of television will significantly change over the next 5 years, though there is no clear direction as to how this will be evidenced. Much was thought to depend upon the outcome of Ofcom's [at the time] proposed review of the airtime trading market-place.

Platform Identification

A common view expressed was that BARB data should continue to be structured to reflect TV platform diversity. Understanding within platform environments was identified as a key goal for the industry, and will become a greater challenge in the future.

Content Lifecycle

An emerging need is being identified of tracking a single piece of content across the various stages of its life, and the need for the ability to link associated variants.

Interactive/Transactional TV

The industry is divided and uncertain about the future of interactivity. Views were expressed that BARB should be flexible in its approach, and put forward alternatives. There was no consensus of opinion about the degree to which transactional TV (e.g. downloads) needs to be measured.

Definition of Viewing

There is widespread acknowledgement that the definition of viewing may be less clear going forward. It may have to change with new forms of viewing to track, and in part dependent upon the technology available to detect viewing.

Other Issues for Consideration for the Future

There is wide recognition that a significantly larger panel would be unlikely to be agreed to be funded by the industry, but the issue of smaller channels reporting and the fragmentation of viewing was one of the most frequently mentioned issues for BARB to consider. New means of consumption and distribution, such as PVRs, Broadband/IPTV, Mobile TV, and Video On Demand were other issues which came to the fore.

Some participants put forward the notion that, in addition to the main viewer survey, BARB's role could develop into a consolidating body gathering TV measurement data from across new platforms and offering an aggregation and 'kite-marking' service for new forms of data.

Attitudes to BARB

There was strong support for the statement that overall BARB provides the industry with reliable audience data, and there is a healthy respect for BARB. BARB scored highly on the following attributes: Trustworthy, Reliable, Good Value, Delivers on its Remit, Up to Date, and Accurate.

Some respondents expressed some dissatisfaction with particular problems that they had experienced.

On the whole, respondents felt that they had sufficient knowledge of the BARB system. Some views were expressed that in certain segments of the industry there may be a lack of knowledge and that more education emanating from BARB would be beneficial.

There was a suggestion that communication from BARB could improve, and that the organisation needed to adapt more quickly and be more proactive.

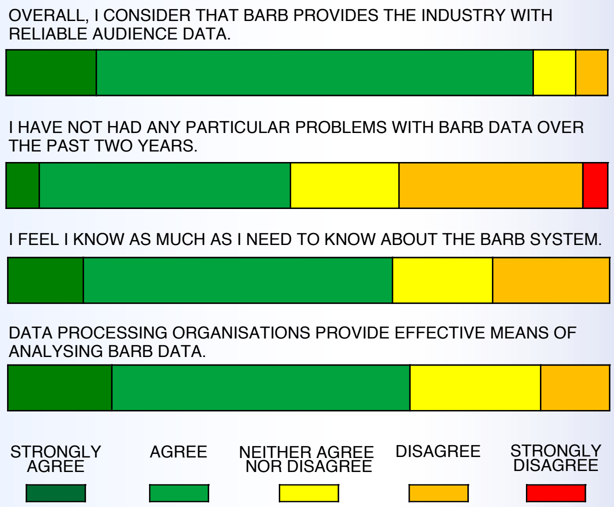
Data Processing organisations were affirmed as providing effective means of analysing BARB data.

BARB's Gold Standard is respected as an authoritative trading currency. The organisation is seen as world class and at the forefront regarding delivery (scale, range and speed).

There's some ambition for BARB to deliver more, though acknowledgement that there are many scenarios of how the future of television will develop creating an uncertain environment. There was also some acknowledgement that in order to develop the service overall, some elements may have to be simplified.

The industry wants BARB to embrace the challenges of the future and feel that the role of BARB as a central body responsible for television data across platforms is really important.

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?



Consultation Comments:

The following examples give an indication of the range and nature of comments received:

Whilst it may seem impossible now, the ability to measure mood, attentiveness and interaction, amongst other attributes, will help to deliver a better TV plan.

An important feature will be the continued technology developments in out-of-home viewing - mobile TV is going to rise exponentially and TV on the move whether watched on a PSP, mobile, 'SkyPod'.

There will be a marked increase in the consumption of TV output through PVRs, PCs, handheld formats. Any consumption of TV that takes place in home - regardless of format – should be measured.

It is essential to be realistic about the cost of providing everything that will be asked for. Everyone wants more data, better data and faster data – but very few people will be prepared to pay the dramatically increased costs that the "ideal" BARB service would need to charge!

Without an unmanageably expensive panel size we do need to find a way of addressing audience measurement of small stations.

The idea of exploring aggregate ratings is very interesting and should be explored.

Combine 'return path data' figures with BARB data to give much more robust output.

The programme data should match where possible the EPG Genres and be controlled centrally for all channels.

Cover all output by broadcasters, e.g. promotions & enhanced/interactive TV.

More light beyond flat demographics – more lifestyle statements, media habits.

We need clear communication from BARB as to what they will and won't be measuring in order to follow alternative measurements

BARB should not dilute its existing measurement by trying to 'catch-all'.

Concentrate on in-home, real-time, quality viewing and let other research tools approximate more "general" out-of-home viewing.

Good to incorporate other media but must make sure TV measurement doesn't suffer.

A single source panel covering more than one medium – i.e. TV and radio combined would be wonderful.

BARB should be at the forefront of measurement changes ensuring that it remains the gold-standard for media measurement and trading in the years ahead.

The feedback we received from the various phases of the consultation has highlighted where there is consensus and non consensus within the industry.

Broad Industry Consensus on Core Requirements

- In-home viewing on all sets, including broadband access.
- Minute-by-minute viewing
- TV distribution platform identification
- PVR viewing
- Time-shift – BARB's new VOSDAL (Viewing On Same Day As Live) definition for over nights is welcomed.
- Broad (reluctant) acceptance of alternative aggregated measure for smaller channels.
- Regional reporting
- Data for Video-On-Demand catch-up services
- Sponsorship and other broadcast events reporting, in addition to commercial spots and programmes.
- More reporting beyond standard demographics
- Fusion hooks, to enable BARB data to be aligned with data from other surveys.

Non-Core Desires, Non-Consensus

- Viewing of content on mobile devices, wherever it occurs
- Interactive content
- Out-of-home (pubs, hotels, offices etc.)
- Measure of engagement
- Cross-Media (e.g. TV & Radio)
- Product placement

Some views were expressed that, if not included in the main service, some elements should be monitored with a view to including when take-up is sufficiently large. Possible occasional viewer surveys covering use of multiple devices, multiple media, demographics, attitudes and brand usage were suggested by some.

Many thanks to representatives from the following organisations for their input into the Future Into View consultation:

118 118; a2a; All 3 Productions; All Response Media; Anheuser-Busch; AV Brown Advertising; BBC; billets media consulting; BJK&E; Booth Lockett Makin; Boots; BSkyB; Carat; CCA International; Channel 4; Channel Television; DDS; DGA; Discovery Europe; Disney; DMS; Dolphin TV; EMAP; Feather Brooksbank; Five; FLE Media; Flextech; Fremantle Media; GlaxoSmithKline; GMTV; Golf TV; guerillascope; Honda; Human Capital; ids; Initiative Media; IPA; ISBA; ITV; John Ayling & Associates; Manning Gottlieb OMD; Masterfoods; MCM Communications; MediaCom North; MediaCom UK; Mediaedge:cia; Mediaedge:cia Manchester; Media Planning Group; MediaVest (Manchester); MindShare; MTV; Nickelodeon; Nylon; OFCOM; ohal; OMD; Optimal Media Sales; Pawson Media; Performance Channel; PHD; Poker Channel; Proctor & Gamble; RSMB; RTE; S4C; Sci-Fi; SComm Research; SMG; Starcom; TAP; Tape Services; Teletext; TNS; Total Media; TRP; Turner; UKTV; Universal McCann London; Universal McCann Manchester; UTV; Viacom; Vizeum; Walker Media; Wall To Wall; WARC; WarnerBros; Xtreme Newcastle; ZenithOptimedia; Zonevision.

Acknowledgements: Cassidy Media Partnership; MediaTel; The Creative Bit.

BARB's Activities in the Development of the Service

The Future Into View consultation results are helping to shape BARB's planning priorities for the future of the service.

BARB has additionally been undertaking some ad-hoc surveys into out-of home viewing to assess the scale of this phenomenon, and to provide some early benchmarks against which the take-up of e.g. mobile viewing devices can be assessed. This will be an ongoing exercise to help assess the relevance of this kind of viewing. The results of the first survey were included in BARB's Autumn 2005 Newsletter and remain available on the BARB website: www.barb.co.uk.

BARB has been developing perspectives for the future regarding features of the nature and extent of viewing. This framework is helping BARB to understand the potential of various possible influences and how the BARB service may be affected by the growth of different factors which impact on television. It is intended that a summary of BARB's work on future outlook will shortly be made available to the industry for further comment and feedback.

BARB outlined at the launch of the Future Into View consultation that the alternatives of fixed people meters (currently used), portable meters for individuals, and return path and server data would be investigated for their future potential – and for the possibilities that may exist for combining within a single system. This work is continuing.

BARB is investigating potential alternative designs for the future of the service, and the alternative measurement solutions on offer from possible suppliers. This process is generating questions and issues of feasibility of alternative designs for the system. These need to be further worked through before any firm conclusions on the long-term shape of the service can be reached.

BARB is in dialogue with industry experts regarding technological developments which may impact on the take-up of television distribution, their roll-out, and the ability to measure new offerings.

BARB will seek dialogue with other measurement organisations to investigate whether any potential exists for working together on measurement solutions. BARB has participated in RAJAR tests of portable meters in order to increase knowledge of this possible route to audience data.

The current service continues to be developed – the inclusion of PVR playback data from Sky+ devices has been introduced into reporting and a generic solution to capture other PVR devices and recordable-DVDs is undergoing final tests for integration into the system. Early trials of a new 'barcode' technique to provide more detail on interactive measurement are currently underway, prior to a decision being taken on the inclusion of this technique into the service.

Further communication from BARB can be expected in the coming months as we clarify the options for the future shape of the service.

BARB
BROADCASTERS' AUDIENCE RESEARCH BOARD LTD