THE SYSTEM AND DEVELOPMENTS

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A brief overview of some key milestones shows us what has brought us to where we are today and puts the BARB service into perspective.

It may seem almost inconceivable these days but there was a time when television audience measurement was based around diaries.

A technique to identify what the TV set was tuned to was then developed, supplemented by diaries to determine the individuals who were watching.

People meters were then introduced with a dedicated handset that would allow people to register their viewing directly to the BARB meter.

Guest viewing was added to supplement viewing from household members.

The increasing population accessing multi-channel services had to be included and then expanded to accommodate digital delivery.

VCRs increased in availability and it was recognised that time-shifted viewing needed to be incorporated into live viewing.

An element of interactivity could also be accommodated on the digital satellite platform.

Often, when talking of television audience measurement, the sole reference is to the black box that is the electronic BARB meter. Get the right box, directly access the viewing – then you've cracked it!

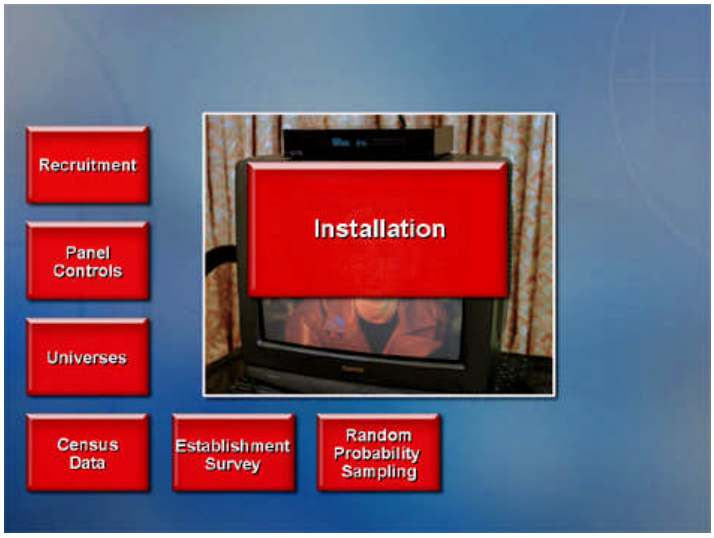
Well no. When we refer to a system it is just that – a system. And it's a system that has many critical component parts.

I'll run briefly through some of these if only to be reminded of the necessary complexity of the BARB system.

Our starting point is to ensure that everyone in the country has an equal opportunity to be contacted. Our Establishment Survey is one of the very few remaining random probability sampling

techniques in survey research. It's critical that we have a survey design from which nobody gets excluded from counting towards BARB measurement.

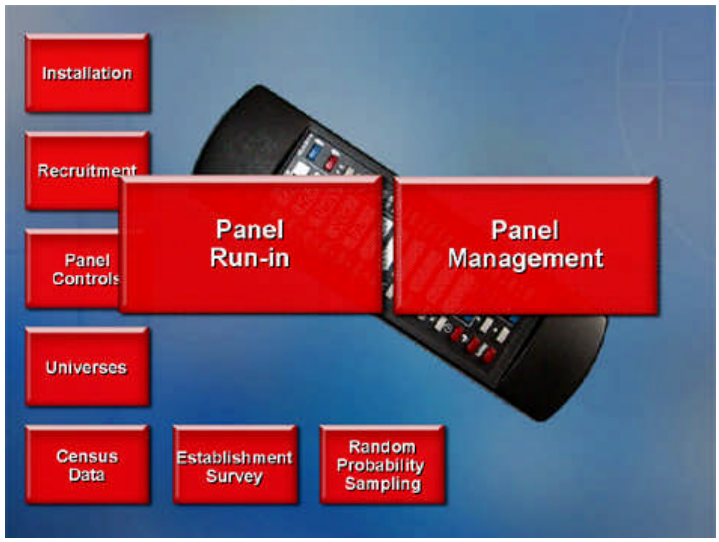
The Establishment Survey conducts 52,500 interviews annually. They are face-to-face, 25- minute interviews that capture the entirety of each household's TV equipment and demographic composition.



From these data, together with government census data, we produce the audience population figures. We can then produce an optimum panel control design to maintain the panels at a level that can deliver 5,100 homes with the correct demographic mix.

A critical part is recruiting members of the public. I think we often overlook the fact that we are recruiting viewers who are part of the general public. It's therefore crucial that we have an approach that is conducive for public participation and co-operation. People clearly have the right to not take part in our research. We therefore need to top-up the panel with new recruits to maintain the level necessary for consistent reporting.

After recruitment the next stage is for the metering equipment to be installed. The TV sets and VCRs are monitored to capture viewing within the household.



Each home then undergoes a minimum of seven days testing prior to them entering any part of panel reporting. This testing is crucial for us to be reassured that all of the metering equipment is working correctly and that panel members understand what is required of them. Not until we're satisfied that that's the case do we allow a home to contribute to the ratings.

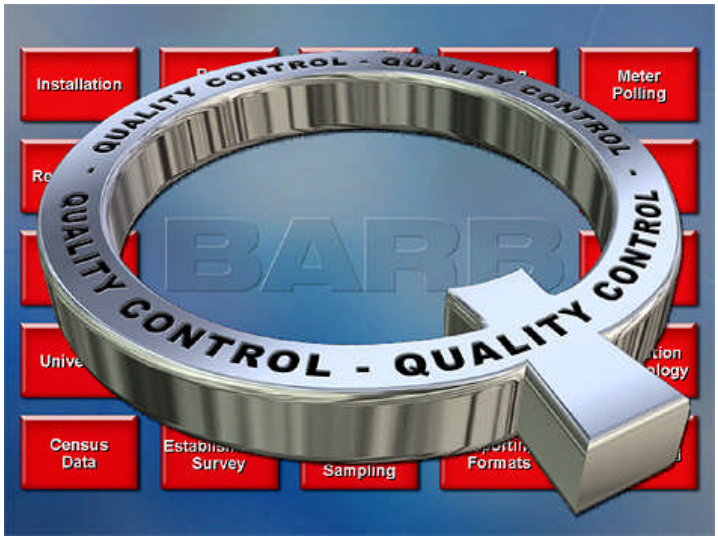
Homes are polled via the telephone line to retrieve each of their previous day's viewing. That's 5,100 homes, 11,500 individuals, each, on average, watching 200 minutes per day – that's 138 million second-by-second statements. Even with increasing computer capability this needs to be reduced to minute-by-minute data you can handle sensibly and reliably.

As the viewing statements are collected, editing rules are applied to ensure that the data is verified as a true record of each panel home. Homes that cannot be confirmed as providing correct viewing will be contacted to remedy the situation.

Having polled the data, it is inevitable that the sample will not be absolutely representative. We do need to correct for imbalances in the profile of reporting homes by weighting the data, a standard process for any survey reporting. The weighting process needs to be as simple as possible in terms of the level of corrections to be made, but as complex as possible to cover the vast range of demographics that are needed for reporting audiences.

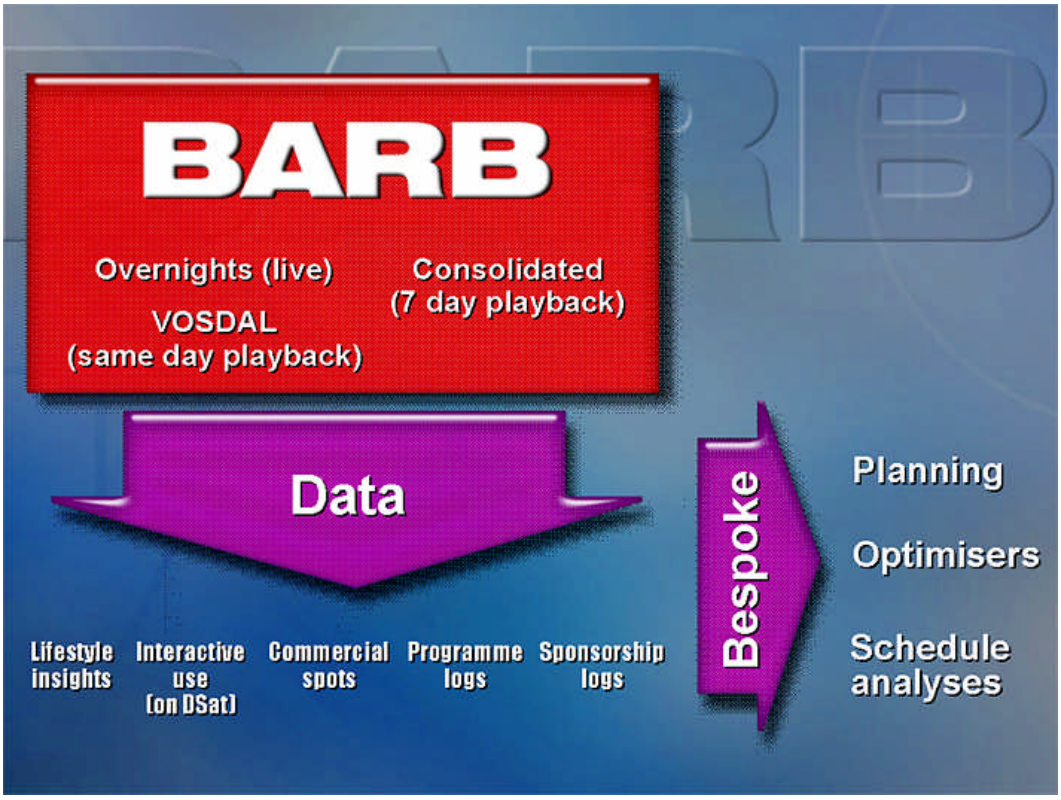
Edited and verified viewing statements are then subject to agreed calculation procedures to ensure that the processing of the data is in the correct format.

And finally, and by no means least, quality control processes. These go on continually across all aspects of the entire BARB service to ensure that processes are working to maintain accepted standards of performance. We need to ensure that reported viewing is as accurate as possible both technically and with the behaviour of our panel members.



So that completes a thumbnail sketch of the current system. But nothing that I've said here needs to be set in stone for the future - that is why we're here this afternoon to open up this discussion. My issue is just to make sure that we are aware of the necessary complexity of the BARB system. We may not need to have that complexity moving forward but we should be aware of what we could be moving away from.

It is a complex system that has been developed to meet all of your requirements. I would say, whatever BARB's requirements in the future, that many, if not all, and possibly even more complexities will need to feature in any future BARB operation.



So that's the overview. Let's talk a little about the output we get from the system.

Part of the BARB data we currently produce is 'overnights' - viewing that you get each morning as live ratings from the previous day's viewing.

On the 1st of July we will introduce an enhancement to the current overnight procedure that accommodates VOSDAL – 'Viewing On Same Day As Live'. With the advent and growth of personal recorders such as Sky+, we have implemented VOSDAL to incorporate viewing that has taken place on the same day of broadcast but not at the precise live transmission time.

Including this viewing will give you a more accurate picture of what actually took place on the previous day. Live viewing will continue to be supplemented with further time shifted viewing through to day seven. This won't, therefore, change our ultimate 7-day playback Gold Standard ratings.

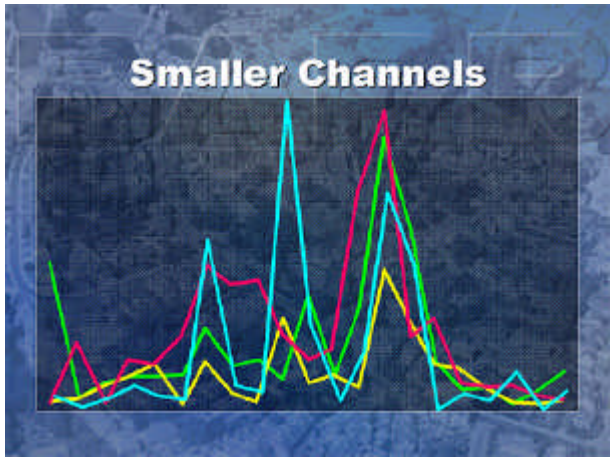
All of this data is supplemented with additional characteristics that help inform you as to what is actually going on within the viewing population. Lifestyle Insights are panel member classifications that are provided in addition to the standard demographic or household information. We have interactive viewing from digital satellite where the broadcast is provided with a code that BARB can identify. The minute-by-minute data is provided with both commercial and programme logs to be able to identify what has been viewed. We've also recently introduced an ability to provide sponsorship credits to both commercial and programme transmissions.

These data are delivered to the industry via data bureaux or to your own individual organisations as sets of databases. From these, bespoke analysis systems can be developed to meet your demands. These include, for example, planning systems, optimisers and schedule analyses. A vast range of information is provided to allow you to determine how best to use BARB audience data. It's provided down to the level of individual respondent and minute-by-minute viewing to give maximum flexibility for developing analysis systems.

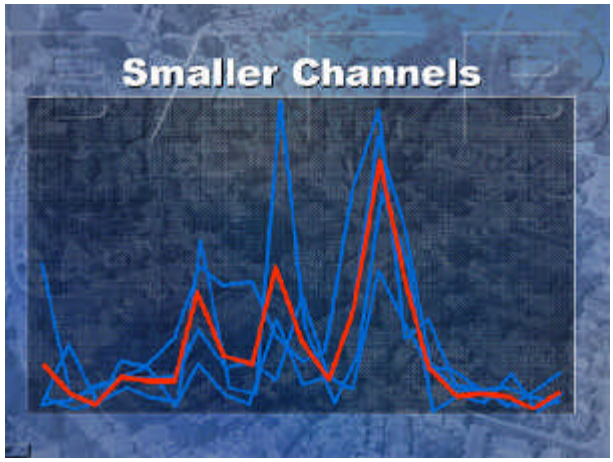
So that completes what I would wish to say by way of background to the current service. I would now like to talk about a couple of issues that have often been raised concerning the BARB service.

As I've already stated, we have a panel of 5,100 homes. It's quite often argued as to whether this is adequate. Ultimately, the optimum level sensible for the market place as a whole determines the panel size as well as what is economically sustainable. There is trade off as there has always been in the past - as there will again be in the future with any size of panel.

Another issue is how BARB can best report smaller audiences. This chart illustrates, for one day across four separate weeks, total viewing to a single channel. It shows the degree of variability that can exist when you are looking at small sample sizes. It should be remembered that this viewing is still reflective of real behaviour from real people.



There are instances where particular peaks are occurring to the ratings. Variability of the data will increase with smaller samples. One way of reducing this variability is to look at how viewing data could be reported differently than at present.



Here you can see what happens when you take those four individual weeks' data and aggregate them together. It takes into account the ratings for each individual week but effectively smoothes out some of the extremities that often will occur.

Is this how BARB should report smaller audiences? Is this a sensible alternative to investing heavily into increasing the panel size? This alternative approach of reporting will produce data that is more robust and consistent over time.

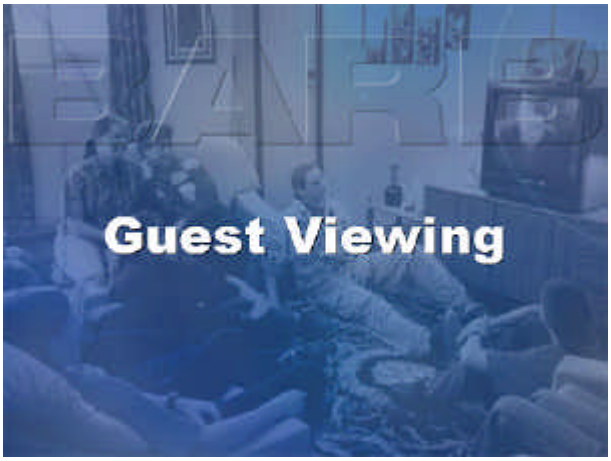
It could be applicable to channels, or programmes, or day parts when the sample is low and thereby subject to a larger degree of variability.

How much effort should BARB put into increasing the panel size to address this issue bearing in mind that increasing the size of the panel would have to be to a five figure level for it to have any significant effect on decreasing variability.

When looking at the panel over the past years we can see how the sample available to the reporting of multi-channel services has increased. The total UK panel has always reflected the natural take-up of homes to multi-channel.

Over the last eleven years the number of individuals reporting multi-channel services on the BARB panel has increased from 2,300 to 8,000 today. As multi-channel penetration grows within the population, so does the multi-channel sample.

Another issue often raised is that of extending BARB's measurement of in-home viewing to include out-of-home viewing.



Previous studies have suggested the level of out-of-home viewing as being between 5 and 10% of all viewing. The largest proportion of this is within other people's homes. BARB already includes this viewing by the inclusion of guests. Anyone visiting a panel home will have their viewing included.

But there are concerns as to whether viewing in pubs, clubs, hotels or the office is significantly different from that undertaken within the home. The way people view television within an out-of-home environment is readily understood as being different from the way people view within their own homes.

If there were to be a desire for measuring out of home viewing, should this be incorporated as part of the current trading currency, or handled as an entirely separate measure? Locations of out-of-home viewing need to be determined and techniques investigated as to their feasibility to capture such viewing.

We've listed here some of the developments - not a comprehensive list - but some of the major ones that are either currently being developed or have already been incorporated within the BARB service.

We have a service that provides the ability to measure sponsorship. We have delivered Lifestyle Insights, providing additional ways of slicing viewing data.

We are about to introduce an electronic form of analysing our Establishment Survey for the first time.

We are going to introduce VOSDAL - viewing on same day as live - to incorporate the increasing level of non-live viewing. Sky Plus measurement is imminent and we are pursuing investigations with other PVR providers.

Interactivity as we stated earlier is in place on digital satellite where we have been provided with an identifiable code and we are looking at alternative means of augmenting this with bespoke systems that can identify all interactive applications.

Broadcast-on-Demand investigations continue as to how we can incorporate the 'seven day' catch up option proposed by some platform operators.

So it may prove necessary to incorporate measurement from different techniques or sources.

We continue to progress developments with people meters. We are going to investigate personal metering options to evaluate their feasibility for measuring television audiences. And we will include in our investigations the potential for incorporating return path data as a means of BARB measurement.

So from a rich heritage of past developments through to a service that still continues to evolve, we now need to consider how we may best move forward.