

LINKING THE NEW WORLD TO THE KNOWN WORLD

Today we have an important agenda – which we hope you will engage with and we'll be interested in your thoughts. There's some opportunity for feedback in follow through dialogue.

We do need to hear from you as were an industry body – owned by the industry – and which aims to meet the collective needs of the industry – in an objective and independent manner.

What we want to cover this morning is very much about the future. We always have plenty to say about the core service, the current service - but today is predominately future focused – although grounded in reality, we hope.

To help us this morning, we'll hear from:

BARB's Research Director – Simon Bolus, Richard Foan – ABC's Director of Communication & Innovation, then Nigel Walley – MD of Decipher Media Consultants will host a panel session with input from: Professor Patrick Barwise - London Business School, Neil Mortensen - Research Director at Thinkbox, Steve Wilcox, MD of RSMB – BARB's QC and Methodological Contractor, along with Richard Foan.

We know that views are never universally held. But generally speaking we know that BARB scores highly amongst you for characteristics like:

Reliability, Trust, Dependability, Robustness, Quality, Solidity

But we also know that people have been unclear about how we've been grappling the future;

I hope that today we can bring you up to date on where we are, how our development work has progressed, and I hope express where we're heading.



The Bigger Picture





- BARB in 1 year
- Industry Involvement

We want to outline

-Where we want BARB to have got to in 1 year and I think it will be different from where we are now - because we're currently seeing several long term projects coming to fruition. We're gearing up to be able to do more.

-And we need to emphasise - What we think we can do with further industry involvement; and we want to be clear that we think that more industry involvement is necessary to ensure measurement potential

is developed.

However, if there's a single word to start today with it would be DATA.

There's a lot of talk about 'data' at present. People seem to use the word without necessarily defining what they mean by it and I think it can create a lot of confusion.

So What's a dictionary definition of DATA & does it help us?

A little but not really – it can be about anything - information. Maybe that is the point – but when we're talking about data we are actually talking about all sorts of things with people not always being sure that they're talking the same language at the same time.

In all the discussion about 'data' it's probably worth being very mindful of different purposes to which information sources / data sources can be put, what may be required of them and of different views that can be created from different perspectives – different sets of data.



da·ta 'deɪtə, 'dæɪtə, 'dɒtə Show Spelled [dey-tuh, dat-uh, dah-tuh]

noun

1. a plural of [datum](#).
2. **individual facts, statistics, or items of information.**
3. **a body of facts; information.**
a collection of facts, observations, or measurements from which conclusions may be drawn.

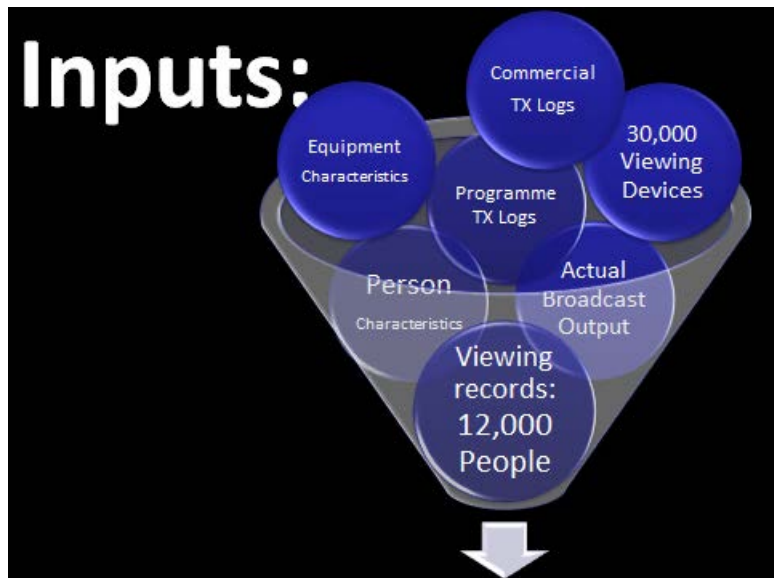
In considering the use that data gets put to we really do need to consider the quality of the inputs and whether the outputs or results have the meaning that we think they do.

Definitions, standards, common understanding.

So what about data in connection with the BARB service?

There's lots of inputs, but trying to keep it simple:

There's transmission logs with details of transmitted Progs & commercials, there's references of all reported stations actual broadcast outputs, then viewing records from about 12,000 people every day for every minute of the day, on around 30,000 viewing devices, and importantly the characteristics of those people – demographics and more – as well as the characteristics of their viewing equipment.



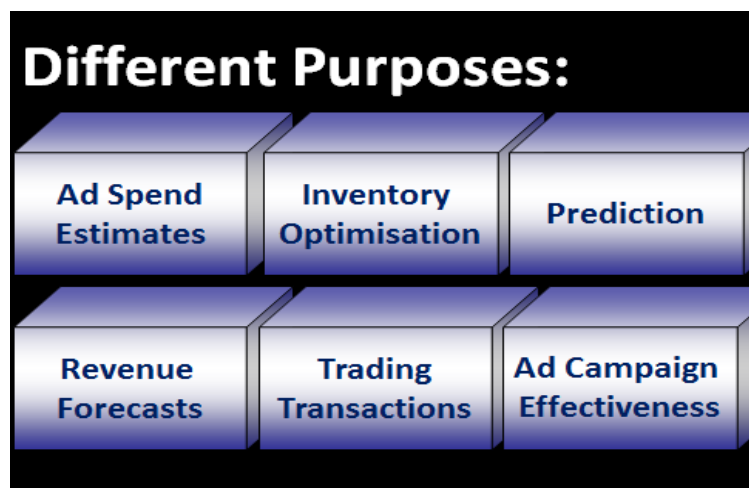
Knowing what you're starting with helps in understanding what it represents and how it could be used – and we have a lot of knowledge of the type of people & type of homes that we have on the panel, in order for our service to be as representative and as high quality as possible. Our Research contractors have to visit every home to (1) secure agreement to participate and (2) to install the electronic metering equipment. The origination points of BARB viewing data are important – are people (and their equipment)- and are known .

So that's inputs - and let's think about outputs

– Ratings / audience profiles / reach measures / patronage / audience flow / even some surrogates for programme engagement - such as hold factors.



And in combining BARB output with other knowledge or information such as revenues, sales, or inventory characteristics, it promotes ad spend estimates / inventory optimisation / prediction / econometric analyses for ad campaign effectiveness / revenue forecasts for channels, and lots of other uses including, Station Price and cost per thousand – which of course are after effects of analysis that could be performed on BARB output.



Also initiatives such as the IPA's Touch Points provide a hub through which other media consumption can be linked to.

Because there's time series output, any other time series data that people hold can be compared & correlated - in relation to programme or advertising transmissions
– whether that be call center activity, text messaging, website activity, twitter trending or whatever it may be

There's a lot of data. A lot of potential uses. . A lot of potential analyses.

Does the industry get as much as it could from BARB data? probably not - although it is put to incredible and extensive use.
..... And to be fair in some cases may get pushed a little too far.

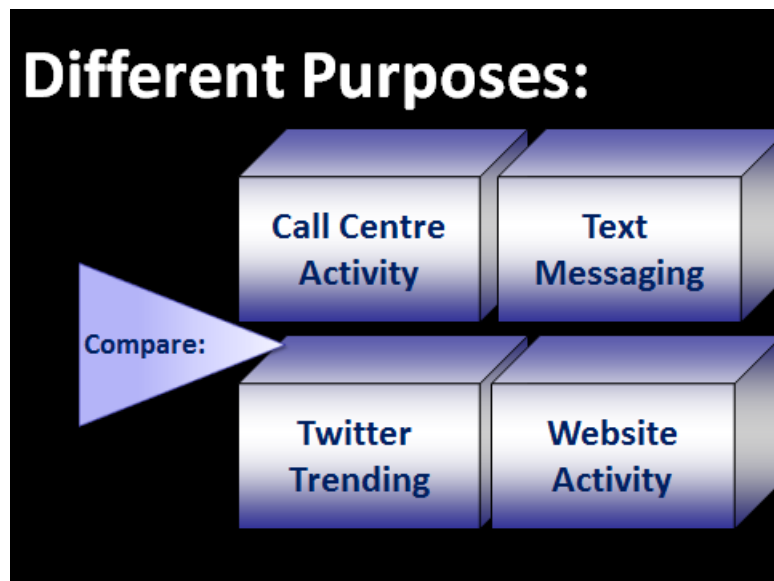
So what's the point of all this –

Well in thinking about Data – we need to recognise that a lot already exists – there are a lot of data functions that have been generated on the back of BARB output.
And a lot of lessons have been learned over the years about the need for input knowledge, data quality, database management, verification, consistency checks, quality control, definitions, protocols, processes, maintenance, representation, and so on.

And in venturing ahead – the industry needs to know what it already knows – and not forget it, just because some of the practitioners are different and some of the data sources are new.

Focussing in more tightly.....In considering where we are and where we're going– lets think what BARB's main strategic options have been for delivering industry requirement for television audience measurement?

1. Continue to measure what we always did in the way we always did
2. Pursue development in the panel approach to measuring TV sets
3. Look to extend the service to enable viewing capture beyond the TV set.
4. Switch from a survey organisation to become a data aggregating and data mining organisation.



Thankfully for everyone we didn't do option 1 at any point in our history. If we had done that with the techniques used and processes available in 1989 we might now be measuring only 5% - 10% of the viewing we're currently reporting.

If we'd stuck with the techniques used and processes available 1999, perhaps only 60 - 70% of viewing might be captured with some confusion

As recently as 2009 we might now be reporting only around 95% of the viewing we report - with increasing blurring

1. Do what we always did, unchanged.		
1989	5-10%	?
1999	60-70%	?
2009	c95%	?

We've actually prioritised 2: the development of the panel approach to measuring TV sets & 3 (looking beyond TV sets) – but 3 subservient to 2 as the importance of the TV Set has not diminished - Particularly with HD and big screens, it remains the best screen available and where our tracking suggests circa 98% of domestic TV viewing occurs.

Even though the headline approach in option 2 remains the same headline approach as when BARB was born 30 years ago - a people meter

The reality is it's a different box, there are different tools in the box, and many more tools in the box which enabled measurement of new forms of viewing – such as :

- widescreens & Flatscreens
- PVRs & DVRs
- Catch-up VOD, including via
- Games consoles + PC's attached to TV sets

All of those form part of BARB's existing measurement & reporting.

I want to affirm that 2 remains a most crucial part of BARB's development plan but 3 (going beyond the TV Set) is now becoming deliverable after much work

2. Develop panel measurement of TV Sets.

3.
Extend reporting beyond the TV Set.

Item 4 is not our priority - we have been unashamedly a survey organisation [and let's be clear – we don't have lots of access to other people's stacks of data, and are realistic that that may never happen] – but in this area, we feel that BARB needs to have some more involvement and engagement now to help formulate the industry approach.

This is really about the alignment of other data for IP delivered TV programming, with panel data.

1.
Do what we always did, unchanged.
2.
Develop panel measurement of TV Sets.
3.
Extend reporting beyond the TV Set.
4.
Data aggregation & mining focus.

We don't have all the answers, nobody has all the answers and anyone who says they do is simply wearing the Emperor's New Clothes. But we can certainly see some high priorities

That's in broad terms that's where we're coming from – Simon Bolus, our Research Director, will outline 4 aspects of our development work in more detail a little later. Some of these are delivering real progress, and they are coming together in enabling the delivery of our vision for the future.

So Today we want to develop our theme of the bigger picture – which is about this vision of prioritising a fuller view of the universe and being able to see where there is greater detail.

- Prioritising a fuller view of the universe

By recognising the strengths of the BARB panel approach to audience measurement to give the Bigger Picture and the limitations of server/Return Path Data from IP connected devices.

- Being able to see where there is greater detail is about the opposite by recognising the strengths of server/RPD data and the limitations of a panel approach [in seeing deep into fragmented activities]



**Prioritising a
fuller view of
the universe.**

**Being able to
see where
there is
greater detail.**

We believe it is not one or the other both are absolutely crucial for making the most the future.

The BARB panel approach has a lot to give, has more to give, but also has limitations and the opportunity needs to be taken to make the most of new ways of being able to gather data of different sorts about IP served Television, while being realistic about what they mean.

A panel doesn't become less relevant - but the right ways of organising & looking at the data

may become more important – A panel approach to audience measurement could the way to make server data more meaningful, and tie it together.

In order to meaningfully see the new detail of the picture - by combining new data sources - there needs to be the right relationship and development in both existing and new data sources.

There needs to be more co-ordination for industry agreed definitions, and how they're deployed and more common purpose. That's part of what today's about.

In the future I believe that BARB may have an even more important role to play for the industry than it has in the past. .. But I think it will be a different role.. An evolving role.

And require different and probably greater industry involvement than in the past - in order to prioritise and facilitate the enhancement of television measurement.

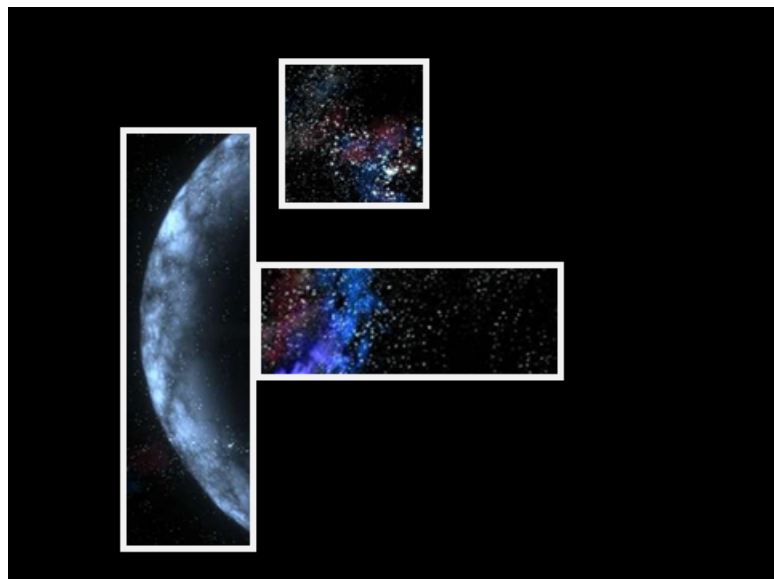
We've been laying new foundations for BARB for the future for quite some time now. The ground has been more difficult to break than either we or others thought it should be. But we think we're heading towards unveiling an enhanced system the opportunity to make the Big Picture about television even bigger.

This is why we seek to relate BARB data to Server data about video activity. If your view of the TV marketplace is only what you yourself do (from your own data) – you have very limited knowledge. It's like having a part of the picture – perhaps very detailed in its definition – but you don't necessarily know which part of the picture you're looking at, where it fits in to the bigger picture, or what else is in that picture.

We see this as an analogy to server data which organisations are able to collect from IP connected devices–

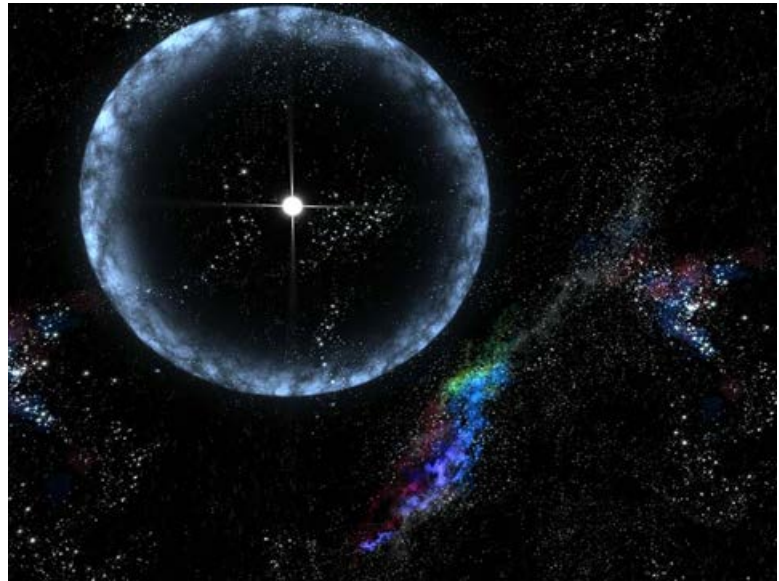
So with server data – if the right standards, protocols and definitions are used and the data is organised correctly, if reasonable assumptions are made & the right filtering carried out – it could be very detailed parts of the picture that are seen – but unless you can see where the data fits in to the marketplace view, it won't tell you as much as it could.

That's why we see it as important to prioritise ways in which types of viewing as reported by BARB can be matched with batches of server data/activity logs in all likelihood held by lots of different organisations. – and probably not shared – either because organisations won't (due to business issues), or they can't (due to data privacy issues)

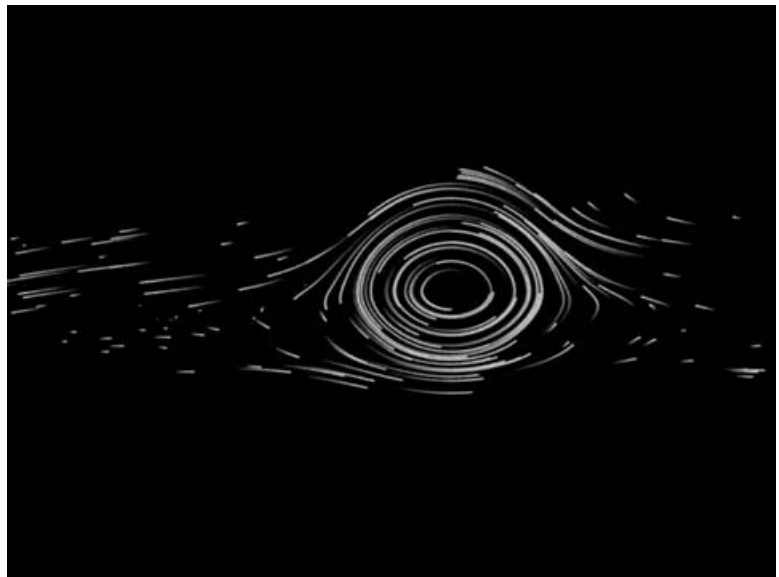


Source: NASA images

By understanding where the server data fits in relation to BARB reported viewing (from the panel) the place in the picture can be located and the server data be given more life and colour.



This is an example of data that's been gathered really cleverly, then structured, analysed, represented and visualised really well. But it helps if you know what it relates to. To make it mean more – not just be a really clever data visualisation. It helps that you know that it's the atmospheric patterns in the Great Red spot of Jupiter, it helps if you know where its located on Jupiter, that Jupiter is a planet, that it has a place in the solar system, and how Jupiter relates to the other planets. That gives it context and meaning.



BARB data can give marketplace context and relationship to what else is going on.

Detailed data on a part of the picture means more if you know where it fits into the bigger picture.

In the same way - Knowing your own viewing performance means more if you also know your competitors viewing performance.



Source: NASA Images

BARB provides the means to identify opportunities, competitive threats, where else your own viewers are viewing, where they may be able to be tempted to go next; or where they may be persuaded from.

This in addition to the analyses that can be run on advertising campaigns and inventories.

We want to concentrate on prioritising reference points and links between the new worlds and the known world.

We think this is a really important point - It's why we think all the development work we've done is relevant and why we feel the industry needs to engage to take our development work forward.

We know that there's lots of interesting work going on in different organisations to build the map and understanding of the new planet surfaces – but that needs to go on in the context of BARB being able to inform whether there are other planets near - how far away from the known world you are, what's similar & what's different - and whether you have asteroids hurtling towards you, and whether there's risks to the atmosphere, eclipses expected or other territory in space to be colonised, or being rapidly colonised by others.

Server data can create a phenomenally detailed model of a planet's surface and what's going on close to it in real time, but not whether people have been hopping at light speed between the planets and moons; or at warp speed from different galaxies.

Let me get out of my analogy and say it for real.

Lots of different organisations are doing their own thing building the future in the way that they currently see it making sense.



Source: NASA images

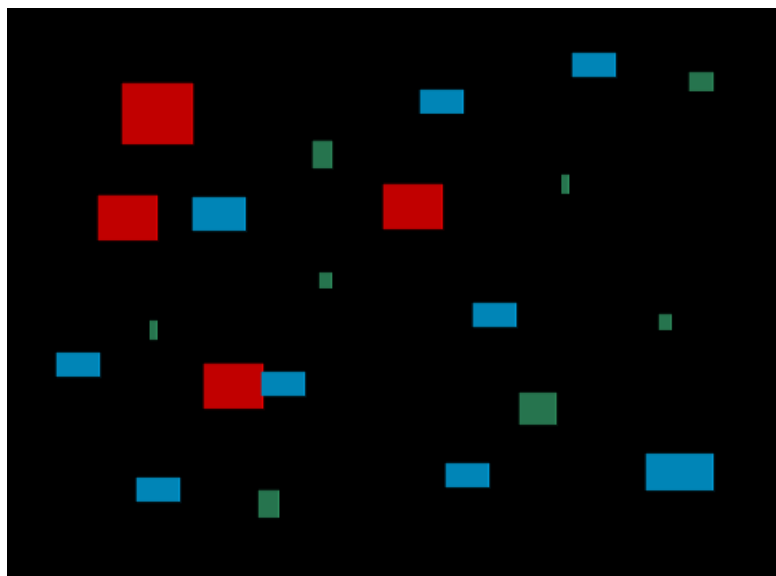
There's a concern that lots of people could be doing different things.

There is a danger that some will be better than others at validating their own thing or that different assumptions or logic is being used in different places to come up with some numbers - not comparable to each other

As well as the possibility of making the market add up to 150% - which might strike fear in the minds of every advertiser

We're in difficult territory here – because this is potentially about competitive advantage.

Do we really want the industry to end up with separate collections of incompatible data sets that for all intents and



purposes are just floating around in empty space occasionally bumping into each other.

We believe that we have a way forward in terms of viewing measurement that protects holders of data from having to release it in the first instance, also protecting privacy requirements. Whilst ensuring the industry can see the bigger picture - and give greater meaning to all the other work with different data sets that everyone is rightly keen on pursuing.

We see an opportunity to liberate server data and give it greater meaning for the industry as a whole:

We need the following:

1. To identify batches of server data relating to specific slices of content/output.
2. To define these equivalent slices of content/programming/commercials' within BARB data.

In order to make 1 happen (in a way that can be used) it's about common standards, definitions, an industry approach.

In order to make 2 happen to insert measurement identifiers ((BARB) encoding or data feeds) into types of output or equipment.

A Way Forward:

- | | |
|---|--|
| 1. Identify batches of server / RPD data relating to specific content. | • Common standards, definitions, an industry approach. |
| 2. Define the equivalent slices of content within BARB data. | • Insert measurement identifiers into types of output or equipment. |

There could soon be so many IP connected devices about that some numbers that will fly about could start to be unfeasible.

It's why a panel approach is needed based on real people and their activities across different sources in order to keep a broad reality into which server data can be made to make more sense and deliver the insight and learning of the new world that everyone wants.

Within BARB data - with the right co-operation - we should be able to identify on the panel the new television platforms, and content, & with enough motivation the advertising.

The level of detail we're able to capture will be partly dependent upon the level of industry priority and co-operation there is.

We do believe that advertising transactions (on some of the new planets) may well take place in the server data but with the right mechanism and technique they can be validated at headline level via BARB data.

It's a difficult task, but unless we persevere with it as an industry [advertisers, agencies, content producers, broadcasters, platform operators, research suppliers]

We could otherwise end up in a few years time in enlightened confusion.

Enlightened – because we have lots more data.

Confusion – because we've lost some of the basic meaning of it, and how it fits into the Bigger Picture.

So my challenge to this industry is be alert, and very aware of the importance of industry standards, definitions, validation, transparency and the need for panel and server data to work together in a way that not only recognises it – but also prioritises it.

There is a real opportunity to build on lots of good work to take some leaps forward – but it will only come with industry liaison – which might require a few defences to be taken down a little.

If ever there was a need for the industry to define its common needs it's now – not only to pursue separate uncoordinated projects all aiming for the same place but ending up in different places

– At the end of this morning I'll announce the BARB Measurement Sciences Forum which we will hope will facilitate better industry co-ordination but now. I'm going to hand over to BARB's Research Director, Simon Bolus – who will explain how we've been developing capabilities to enlarge the view of the universe to enable new elements to be part of the picture.



Beyond recognition to priority:

**Importance of Industry Standards:
definitions,
validation,
transparency.**

**The need for panel & server data to
work together.**