

BARB

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Bulletin

BARB has been reporting UK television audiences since August 1981, providing the industry-standard audience measurement service for television broadcasters and the advertising industry.

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BROADCASTERS' AUDIENCE
RESEARCH BOARD LIMITED



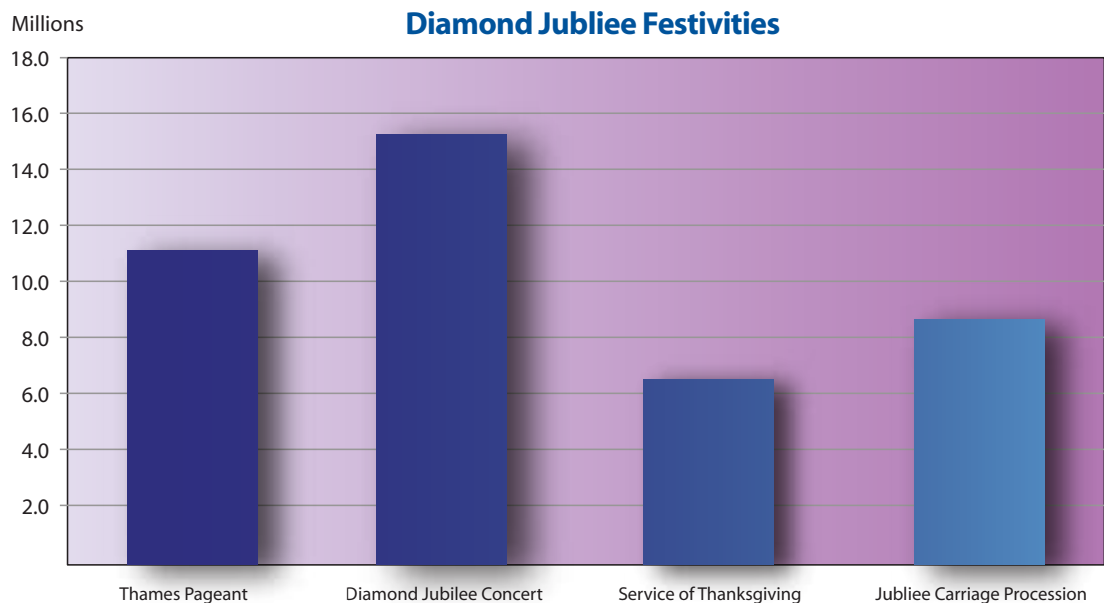
The Diamond Jubilee Celebrations

With Queen Victoria being the only other British Monarch to reign for more than 60 years (63 years and 7 months) the recent Diamond Jubilee was a great celebration.

When Queen Elizabeth II ascended to the throne upon the death of her father, King George VI, on 6th February 1952 and crowned as Queen on 2nd June 1953 commercial television did not exist. In fact it was to be another 2 years before ITV started transmitting in London on 22nd September 1955. When Queen Elizabeth II was crowned it was the first time that a Monarch's coronation was televised live. 20 million people watched the coronation with friends and family huddled around a small television set, with 1 million sets purchased specifically for the event. When the Queen had been on the throne for just 4 years (1956) only 36.5% of all homes had a TV set compared to the 96.7% of homes today.

During the Queen's reign television has transformed from black and white transmission, to colour and now high definition and 3D. She has seen the launch of different platforms for viewing – digital satellite, digital cable and digital terrestrial and of course the newest forms of internet connected TV sets and games consoles such as Xbox and PS3. When Queen Elizabeth II commenced her reign there was just 1 channel available (BBC) which broadcast for just 50 hours a week; today BARB reports on just under 300 channels, the majority broadcasting 24 hours a day, 7 days a week.

The main events connected with the Diamond Jubilee weekend at the beginning of June prompted high viewing levels, as shown in the chart below.



Source: BARB, Programme average audience, all individuals 4+

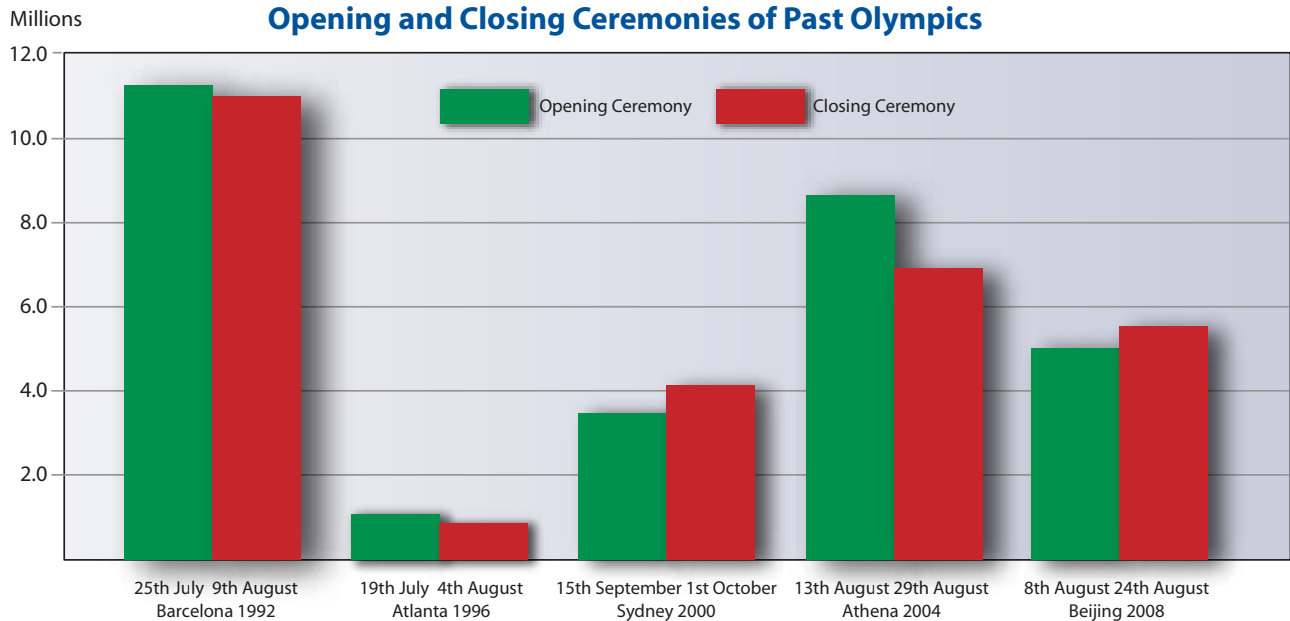
The Thames Pageant, 'Flotilla', was shown across BBC1, BBC News and Sky News generating an average viewing audience of 11.2 million people. It had a combined reach of 36.2% of individuals 4+.

The concert at the Palace on Monday 4th June (shown on BBC1 SD +HD) was watched by an average 15.3 million people (just under 3 million more than the Golden Jubilee concert on 3rd June 2002, averaging 12.5 million). The Service of Thanksgiving on Tuesday 5th June, shown across BBC1, ITV1/+1, BBC News and Sky News, was watched by an average 6.6m individuals (less than the 9.0m who watched the Service of Thanksgiving back on 4th June 2002). The state procession, covered by the same channels, averaged 8.7 million individuals. Combined reach was 24.6%. For the 2002 Golden Jubilee the state procession took place before the Service of Thanksgiving and was watched by 8.0 million people.

Opening and Closing Ceremonies of Past Olympics

As London and the rest of the UK prepares itself for the Olympics starting on 27th July we thought it would be interesting to take a look at past Olympics and the viewing they received.

The opening ceremonies are spectacular extravaganzas and set the stage for the events ahead. Looking at the past 5 Olympics, the viewing was varied, with a high of 11.3 million viewers for the Barcelona Olympics in 1992 and a low of 1.1 million viewers for the Atlanta Olympics in 1996. The opening ceremonies are broadcast live and the time differences explains the wide variation in viewing figures.



Source: BARB, Programme average audience, all individuals 4+

The closing ceremonies are equally as spectacular and achieved similar viewing levels to the opening ceremonies. From the chart opposite, the Barcelona closing ceremony on 9th August attracted the highest level of viewing with 11.1 million viewers with the Athens closing ceremony on 29th August attracting 7.0 million viewers. Both ceremonies were shown in the evening with Barcelona at 9pm and Athens at 7pm. In contrast the closing ceremony in Atlanta on 4th August achieved viewing of just 0.9 million but this was shown at 2.00am.

We are sure that the London 2012 opening and closing ceremonies will be equally spectacular. So the very best of luck to Team GB and let's hope the rain stays away.



Measurement Sciences

Measurement sciences activities have revolved around understanding opportunities to align other sources of viewing/usage data from return path or server data sources - defining links, setting guidelines, creating standard models, or ingesting other data sources in appropriate ways.

There has been interaction with interested parties to comprehend the range of requirements/ desires of the industry, the possible sources of data, and options for linkage between panel and server data.

BARB's work will also be dependent upon the activities of other industry groups, such as the Digital Content Working Party (previously BMWG - to which BARB provides input) – developing standards for server data sources.

Connections between BARB data and server data are dependent upon also being able to identify equivalent services in both sources for comparison or connection. Kantar Media is enhancing processing of BARB data in order to facilitate the ability to 'mark'/'flag' viewing data for the BARB panel. Proof of concepts and experiments are being undertaken at broadcasters and BARB's contractors to determine if the concepts are deliverable in practice.

This is an active process of investigation, development and iteration to explore the possibilities of panel data and RPD/server data being utilised together to deliver greater benefit than each source on its own.

Input is always welcome and interaction with the industry is an important part of BARB's Measurement Sciences activities. Please contribute to dialogue@barb.co.uk.

▶ **BARB Continues Deployment of Web-TV Meter**

BARB is continuing with the rollout of a web-TV meter into the core BARB panel, having trialled its production capability.

After some extensive testing, the production system has now been proven on the initial 100 homes rollout. Over the last 2 years capability has been created in the BARB system to introduce this new approach to measure viewing via laptops and PCs. A version is also in development to transfer the capability to tablet devices.

Integrating the next 500 homes with the web-TV meter is the immediate step in the coming months, then BARB will continue to extend the technique to more homes on the panel.

This project has been ground-breaking work with Kantar Media Audiences (who operate the panel for BARB). It has been taken from proof of concept, through test, pilot, and into production capability. The task is now to scale-up production, and agree and implement reporting formats with the industry.

The first reports in early 2013 can be expected to be some initial broad summaries. Then, when the number of homes with the web-TV meter on the panel increases further, and the data is more understood, additional detail in reporting could be introduced.

Web-TV Meter Development Process



▶ **Whys and Wherefores?**

BARB Measurement of VOD (Video on Demand)

Currently any viewing to programmes broadcast within the past 7 days is picked up and reported as time-shifted viewing, provided it takes place on a TV set. (BARB is at the first stage of installing meters in its panel homes to measure TV viewing on PCs and laptops).

The main technique for measuring viewing is audio matching, which captures time-shifted viewing, so long as what is being viewed matches what was broadcast. This is the case whether a programme is recorded and being played back or is being accessed from a VOD service. One current limitation, however, is that it is not possible to distinguish between VOD viewing and play back of a recording using audio matching alone. Another is that, for VOD services in particular, if the commercials differ from those in the original broadcast (which is usually the case) viewing to VOD commercials cannot be picked up.

BARB Announces New Chief Executive

The Board of BARB has appointed Justin Sampson as the new Chief Executive of BARB. He will succeed Bjarne Thelin, who announced in February that he would be leaving BARB at the end of the year after nine years at the helm. Justin will take up his post on 1 November to allow a handover period prior to Bjarne's departure.

Announcing the appointment, BARB Chairman Nigel Walmsley said, 'The Board is delighted that Justin is to join us. His wide experience in senior roles in broadcasting, research, marketing and television audience measurement will be invaluable. He will bring to the job both hands-on understanding of the core BARB gold standard service and an active engagement in digital media developments.'

Justin's most recent position was Chairman of the ICM Group. Prior to that he was UK Managing Director of AGB Nielsen, which specialises in TV audience measurement. His previous positions included ITV's Director of Customer Relations, in which he was instrumental in the establishment of ThinkBox, and Managing Director of the Radio Advertising Bureau.

Prior to taking up his CEO role, Justin will be joining BARB in mid August on a project basis to work with Bjarne on some of BARB's strategic projects to deploy new technology and data sources to measure changing audience behaviour.

Justin Sampson said, 'Viewers have a wide array of choices for how and when they watch their favourite programmes thanks to digital developments, while businesses have more and more data on patterns of behaviour. The challenge for BARB is to maintain its gold standard television audience measurement regardless of the platforms and devices used by viewers. Leading BARB's strategy through this changing environment is an exciting prospect.'



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