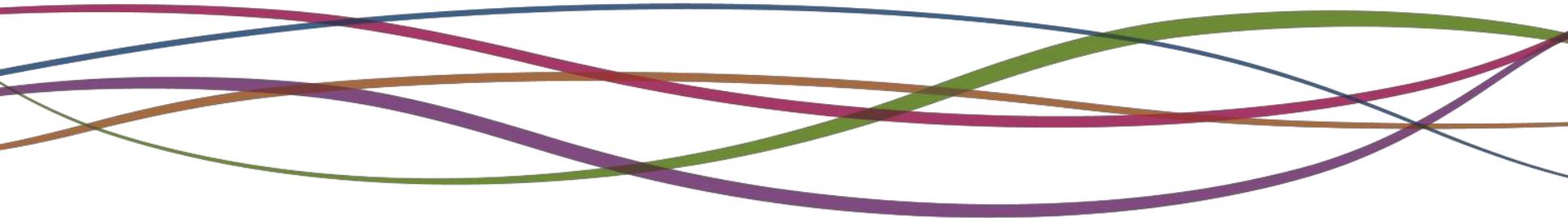




Audit of the panel management

Broadcast Audience Research Council

Audited period: July to November 2017



- Broadcasted Research Council (BARC) optimized the panel management of the TV audience measurement system in 2017. This innovation process was supported by new procedures, a new organization of the team and new software.
- Upon the request of BARC, CESP conducted an audit of this new panel management organization. Under the control of BARC, Meterology Data PVT LTD (MDL) is the organization in charge of the daily panel management.
- In 2017, the panel was expanded from 20,000 to 30000 installed households.
- The main objectives of this audit are to:
 - Evaluate the current panel management according to the Indian local environment and specificities
 - Analyze the efficiency of the current organization, monitoring and process according to the global guidelines of TV audience measurement (GGTAM) and international benchmarks.
 - Share actionable recommendations in order to improve the day to day panel management.
- Based on CESP experience, the main criteria to evaluate a panel management system are:
 - The organization of the panel management teams
 - The monitoring of the panel
 - The process in place
 - The panel management performance
- The editing rules, cleaning rules and data processing are not part of the scope of this audit.

Background and objectives (count.)



- This audit is based on:
 - 4 days of working sessions in Mumbai with BARC and MDL representatives between November 2017 28th and December 1st
 - The examination of documents provided by BARC and MDL
 - Regular conference calls
 - The interviews with MDL management and one relationship manager
 - The visit of five panellist households in Mumbai
- CESP has conducted TV audience measurement audits including panel management processes in more than 20 countries to date. CESP cannot share the conclusions of these audits for confidentiality reasons.
- However, this experience is very useful to benchmark the different systems in place versus the BARC system. Therefore, CESP shares in this report an anonymous benchmark on the main key performance indicators based on 10 audits conducted in the last 5 years.
- This benchmark is based on the TV audience measurement systems in Bulgaria, France, Kingdom of Saudi Arabia, Poland, Portugal, Russia, Serbia, Singapore, Ukraine and the United Arab Emirates.
- This report shares the main conclusions and recommendations of this audit.
- CESP underlines that this audit is based on CESP trust in all information shared by BARC and MDL.
- CESP would like to thank William McKenna, BARC consultant, BARC and MDL managements for their active cooperation during the mission.

Executive summary

CESP considers the panel management deployed by BARC as aligned with international standards. In the context of a major panel size expansion, the new process put in place in 2017 appears well designed. However, CESP recommends a few improvements of the current procedures.

CESP considers as satisfactory:

- The organization of the panel management team
- The involvement of the different teams
- The ticketing system to allocate the tasks and to track them
- The monitoring of the panel
- The new software in place to support the panel management activity
- The advanced security process to track corruption

CESP has 2 main recommendations:

- **Removing the criteria of minimum TV viewing to join the panel and increasing the probationary period to at least 10 days.**

The recruitment of panellist households is random but the integration of the new households in the panel results is only done if the household members reach a TV consumption threshold during the probationary period. This threshold could generate an underrepresentation of the light TV viewers in the panel. However, based on BARC statistics, this underestimation is quite low at this stage. Indeed, the percentage of households excluded from the panel for this reason is below 1%.

- **Putting in place a coincidental survey aligned with international standards.**

Even if the fieldwork organization conducts some checks of the panellist compliance, CESP highlights the absence of coincidental surveys conducted by an independent team from the panel management organization.

● CESP also suggests to:

- Tracking the individual TV viewing. In 2017, the TV viewing tracking was mainly at the household level. The Panel Health Analyzer platform (PHA) launched at the end of December 2017 should support this necessary tracking.
- Continuing the action plan to recruit the under installed households generally belonging to the lower social classes (C,D and E) or living in rural areas and anticipate this issue for the next panel expansion phases.
- Continuing the action plan to reach at least 90% of the installed panellists reporting audience information. Additional pieces of technology could support this improvement.
- Optimizing the deployment of the ticketing system by improving the percentage of closed tickets.

● Following this first panel management evaluation, CESP recommends conducting household visits to audit the panel management in real life: alignment of the actual household status with BARC database, training of the panellists, panellist compliance with the panel management instructions. It would also be an opportunity to conduct real life tests of the peplemeter data collection.

Executive summary (count.)

Main steps	CESP audit results		
	Satisfactory	Adjustment suggested	Improvement required
Organization			
Organization directly involved in the panel management	✓		
Efficiency of the information processing from the panellist insights to the panel management team	✓		
Involvement of the panel management team	✓		
Security organization to avoid potential corruption of the panellists	✓		
Size of the team in charge of the technical panel maintenance	✓		
Monitoring			
Reporting in line with panel management objectives	✓		
Additional panel management reporting	✓		
Tools to support the panel activity	✓		

- **Satisfactory:** aligned with international standards or best practices
- **Adjustment suggested:** recommendation to further optimize the system potentially open to discussion with the industry
- **Improvement required:** mandatory action to improve the system based on international standards or best practices

Executive summary (count.)



Main steps	CESP audit results		
	Satisfactory	Adjustment suggested	Improvement required
Process			
Procedures leading to precise panel management actions		Track individual TV viewing	Conduct coincidental surveys by an independent team
Documentation of the procedures	✓		
Consistent deployment in the teams	✓		
Tracking of the deployment	✓		
Automatization of the process	✓		
Probationary period after installation			Remove the TV viewing threshold to join the panel
Security procedure	✓		Extend the probationary to at least 10 days

- **Satisfactory:** aligned with international standards or best practices
- **Adjustment suggested:** recommendation to further optimize the system potentially open to discussion with the industry
- **Improvement required:** mandatory action to improve the system based on international standards or best practices

Executive summary (count.)



Main steps	CESP audit results		
	Satisfactory	Adjustment suggested	Improvement required
Panel management performance			
Achievement of the panel size objectives	✓	Pay attention to the under represented profiles	
Stability of the panel size	Not relevant due to the current panel expansion		
Actual management of the panel management tasks	✓	Improve the number of closed tickets	
Ratio of reported households/Installed households		Continue to improve this ratio through technology and panellist training	
Panellist compliance to the peoplemeter registration		Put in place technology urging the panellists to register themselves as soon as the TV set is switched on	Deploy an independent coincidental survey

- **Satisfactory:** aligned with international standards or best practices
- **Adjustment suggested:** recommendation to further optimize the system potentially open to discussion with the industry
- **Improvement required:** mandatory action to improve the system based on international standards or best practices

BARC Response



Overview

CESP

BARC

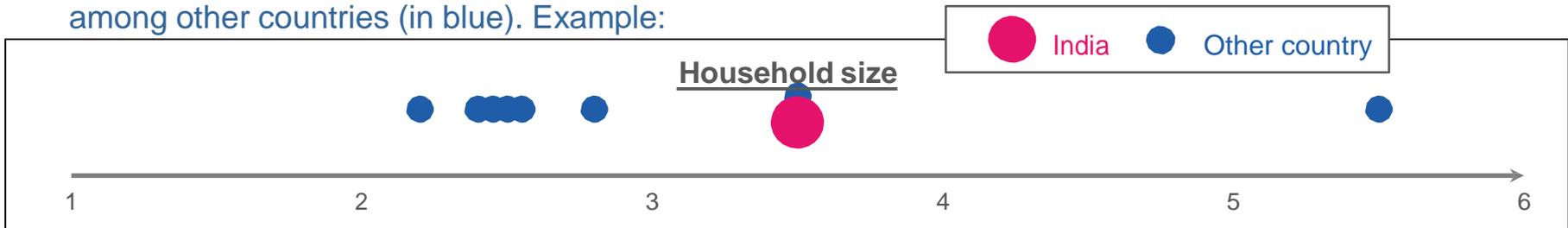
 Process Probationary period of installation	<ul style="list-style-type: none">Remove the criteria of minimum TV viewing to join the panelIncrease the probationary period to at least 10 days	<ul style="list-style-type: none">We will discontinue the viewership criteria for determining lapse households (currently less than 1% of total installed base)We will increase the probationary period for new households from current 7 days to 10 days
 Process Panel management actions	<ul style="list-style-type: none">Put in place a coincidental survey aligned with international standards	<ul style="list-style-type: none">We will conduct co – incidental surveys through an external independent agency for sample households on a quarterly basis, or through telephonic interview via our third party – managed call centre, to supplement the current co – incidental surveys conducted by the field team.
 Process Panel management actions	<ul style="list-style-type: none">Track the individual TV viewing	<ul style="list-style-type: none">The PHA (“Panel Health Analyzer”) platform that became operational in late December 2017 and is in daily use today provides MDL with the ability to track both HHs and individuals on a daily basis using a moving 28 historical reference window.

GfK response to the Audit Report Overview

CESP considers this BARC main action plan aligned with its recommendations. The deployment of these panel management improvements should be audited in the coming months.

Executive summary (count.)

- **The following slides present an anonymous benchmark of the different systems in place versus the BARC system.** This benchmark is based on 10 audits conducted by CESP in the last 5 years in Bulgaria, France, Kingdom of Saudi Arabia, Poland, Portugal, Russia, Serbia, Singapore, Ukraine and the United Arab Emirates.
- **This benchmark consists of:**
 - A preamble presenting the geography and demography heterogeneity of countries. It also highlights the main differences of panel characteristics.
 - A synthesis of the main qualitative and quantitative performance indicators analyzed in this audit.
 - An anonymous distribution of the quantitative indicators country by country to visualize the magnitude of the panel management indicators.
- For quantitative key performance indicators, CESP represents BARC system performance (in purple) among other countries (in blue). Example:



- For qualitative key performance indicators, CESP used a scale. Each cell represents a country, the cells colored in purple represent the country sharing the same characteristic as India. Example:



Only 2 countries, including India, face these issues

No specific electrical issue in the other 9 countries

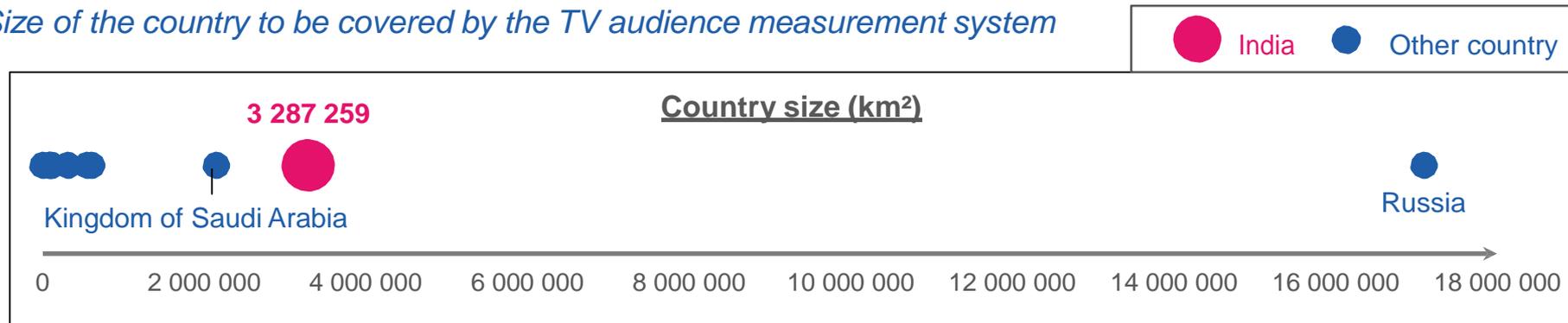
Preamble

Geographical and demographic differences



Geographical context

Size of the country to be covered by the TV audience measurement system

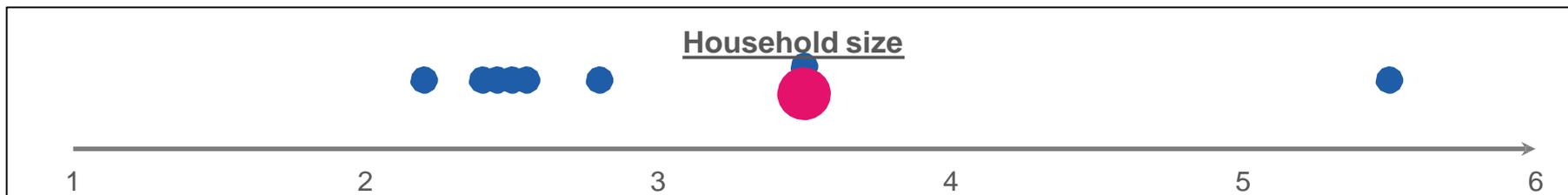


Source: The World Bank

- India is one of the largest audited countries, in terms of surface area.

Average number of household members

Level of difficulty to convince all the household members to be compliant to the TV audience measurement system



Source: United Nations, department of Economic and Social Affairs

- The average number of household members is higher than in most audited countries.



Cultural behaviors on plugging electrical devices all the time, electrical or communication infrastructure issues

It raises technical difficulties to collect peoplemeter information



Only 2 countries, including India, face these issues

No specific electrical issue in the other 9 countries

- India is one of the few countries facing behavior and electrical issues in CESP benchmark.

Preamble

Panel characteristics

Panel size

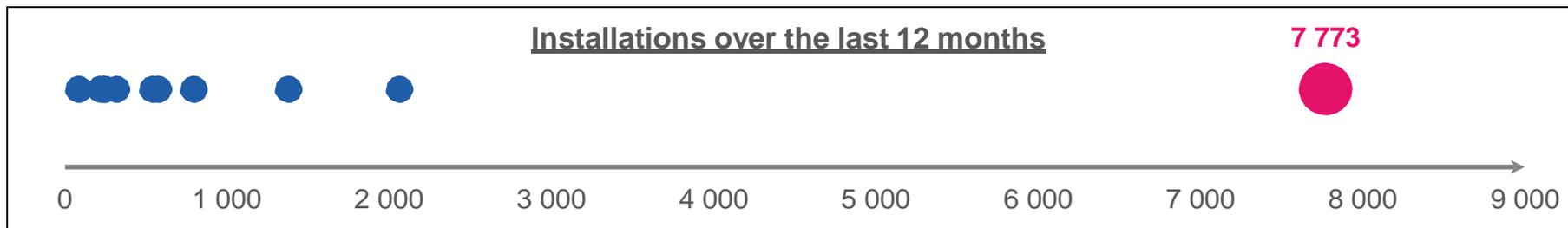
The larger the panel is, the more demanding the panel management is.



➤ BARC panel is much larger than the other panels CESP has audited .

Installation of new households

Installation is a demanding task



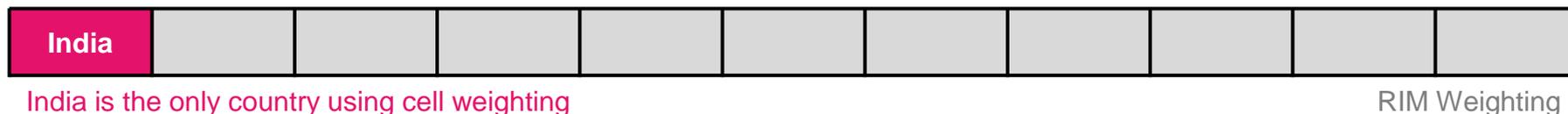
➤ BARC panel achieved the largest household recruitments in the world.

Preamble

Panel characteristics (count.)

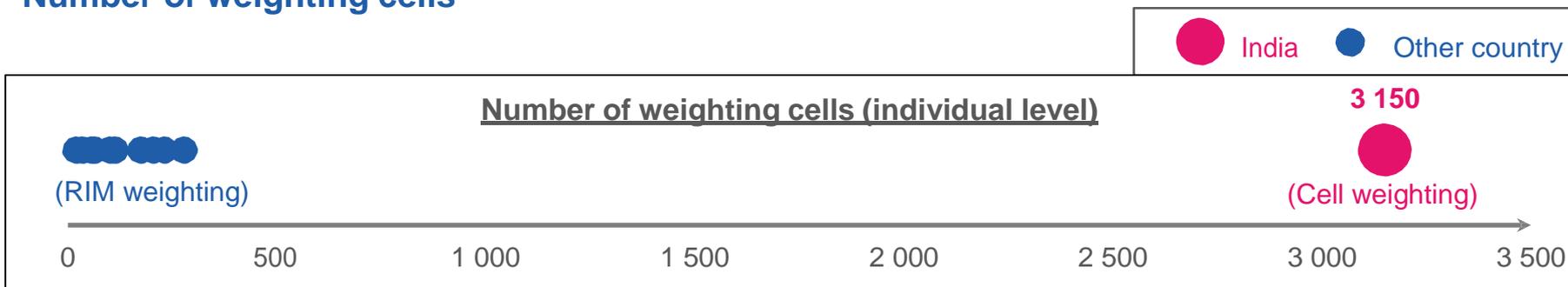
Weighting method

Cell weighting versus RIM weighting



- Most of the weightings are conducted using the RIM Method.

Number of weighting cells



- India has a much higher number of weighting cells.

Audit

1. Organization



Usage of external agency



2 countries, including India, use external agencies

9 countries do not use external agencies

- BARC uses external agencies for the panel technical support. It is only the case of 1 country other out of the 10 included in CESP benchmark.

Efficiency of the information processing from the panellist insights to the panel management team



All audited countries have a satisfactory level of efficiency

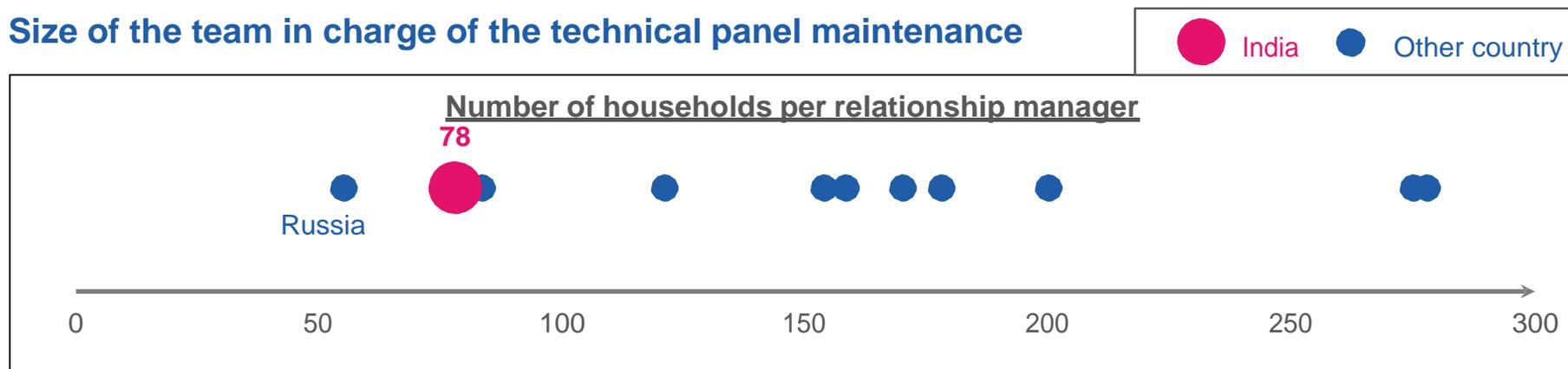
- In comparison with the 10 TV audience measurement benchmark, BARC is aligned with all TV audience measurement benchmark in terms of main organization.

Involvement of the panel management team



- In their large majority, the teams in charge of the panel management are motivated by their mission except in 1 audited country. MDL appears in the upper bracket of the involvement. It is a strong asset for the current BARC projects.

Size of the team in charge of the technical panel maintenance



- BARC is on the upper bracket of the audited countries in terms of number of technicians versus panel size. It is mainly due to the size of the country. BARC is strictly aligned with the largest audited country i.e. Russia.

Audit

2. Monitoring



Reporting in line with panel management objectives



Satisfactory monitoring

Not satisfactory monitoring

- Among the 10 benchmark audits, CESP identified 2 countries where this monitoring was insufficient to achieve an effective panel management.

Tools to support the panel activity



All audited countries have a satisfactory panel management tool.

- All the audited TV audience measurement systems include a dedicated panel management tool. A software is usually deployed internationally by the headquarters of the main media research companies. The BARC system is based on a suite of software covering the different required specifications.

Audit

3. Processes

Procedures leading to precise panel management actions



Satisfactory recruitment and daily management

- The recruitment and the daily management of the panel are aligned with the other 10 audited TV audience measurement systems.

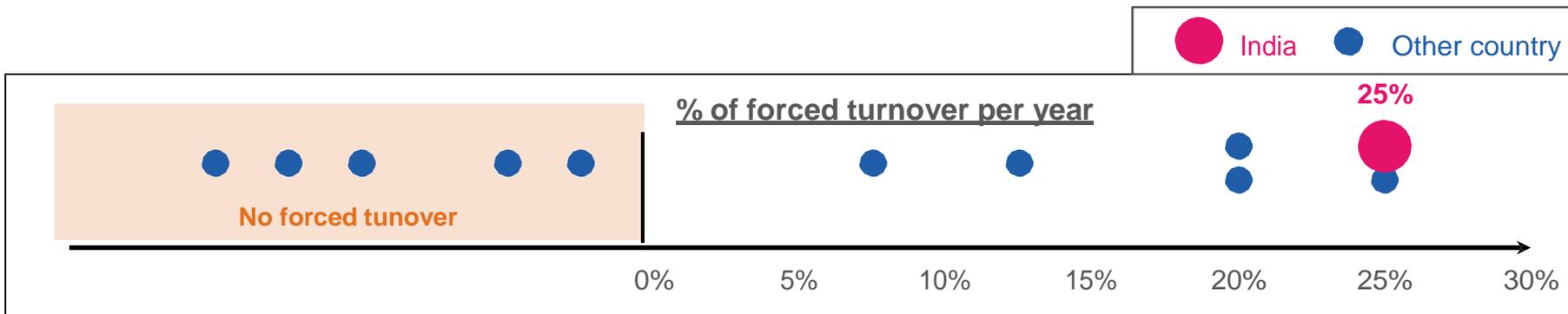


Incentives: cash money

Incentives: gift and vouchers

- Only 3 countries use money as panellist incentive instead of gifts or vouchers.

Procedures leading to precise panel management actions (cont.)



- 5 countries out of 10 TV audience measurement systems put in place a forced turnover of the panel

Coincidental survey conducted by an independent team from the panel management team



- In 9 countries out of 10 the coincidental is conducted by an independent team. BARC does not conduct this standard quality process.

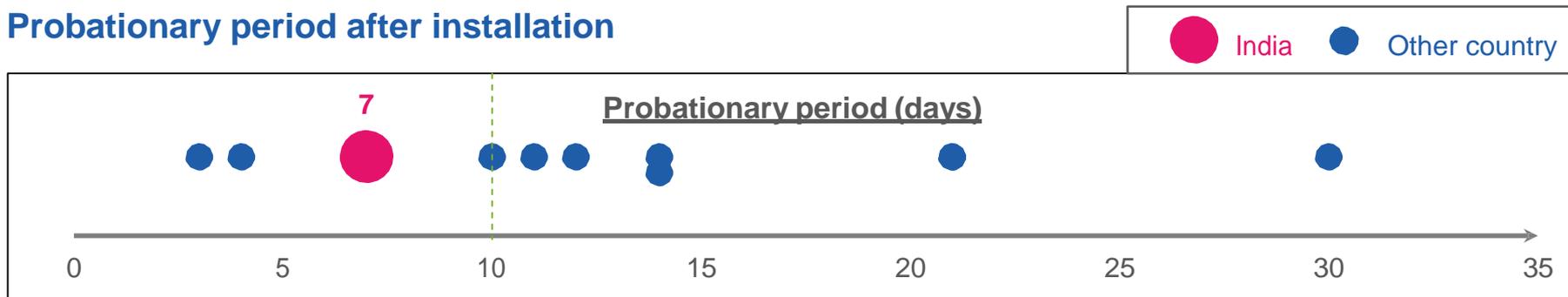
Documentation and deployment of the procedures



All audited procedures are satisfactory

- The procedures are clear and well deployed in the TV audience measurement systems that CESP audited.

Probationary period after installation



- The probationary period is minimum 10 days in 8 audits out of 10 TV audience measurement systems used as a benchmark.

Security procedure



Country where security procedures are put in place

- All the audited countries have security procedures in place.



Dedicated system to the corruption issue

No dedicated system

- BARC has put an extensive procedure in place. Only 1 other country reinforced the security of the panellist addresses in the benchmarked countries.

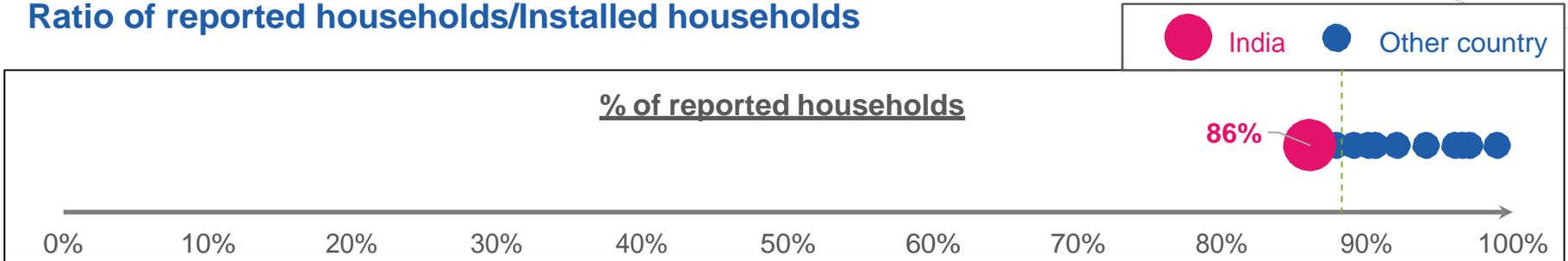
Achievement of the panel size objectives



All countries achieve their panel objective

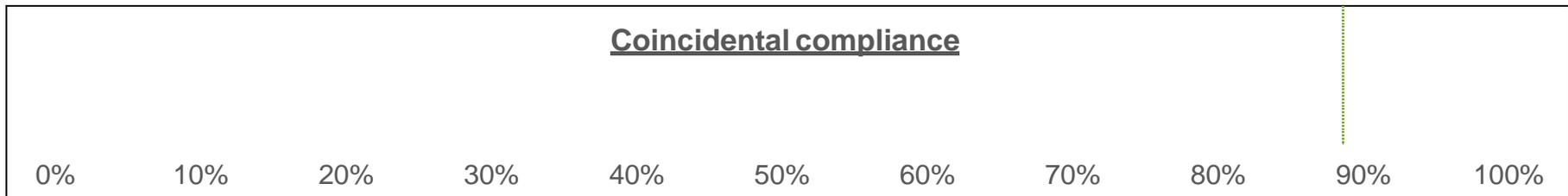
- In the context of the panel expansion or running mode, the 10 audited TV audience measurement systems reached their commitment in terms of panel size.

Ratio of reported households/Installed households



- 9 out of the 10 audited TV audience measurement systems reach this ratio of 90% reported households. BARC is close to this objective with 86% of connectivity with its panellists.

Panellist compliance to the peplemeter registration



- Only 2 countries do not reach the ratio of 90% compliant panellists. BARC does not conduct this standard quality process.