



BARB has announced (16 October 2003) the appointment of its new Chief Executive, Bjarne Thelin, currently Director of Planning at Carlton Television, who will be taking up his appointment early in the New Year.

In this Newsletter, as promised, we provide updates on the status of the BARB panel, viewing trends, interactivity and sponsorship, together with new topics, including the implications for television audiences of the release of the results from the government's 2001 census.

PANEL

We have continued, throughout the summer, to increase the number of reporting homes on the panel. From week-ending 28 September the panel exceeded the target of 5,100 homes. These homes provide 11,500 reporting individuals – the largest ever BARB panel. Within this UK total all of the regional panels are either up to, or very close to, their designed reporting size.

Homes will continue to be recruited to the panel to ensure that these reporting panel sizes are maintained. Continuing recruitment will also help to maintain the panel size over the Christmas and New Year period when many homes acquire new TV equipment. When this happens we temporarily remove those homes from the panel so that their new equipment can be configured for monitoring.

Expansion of Multi-Channel

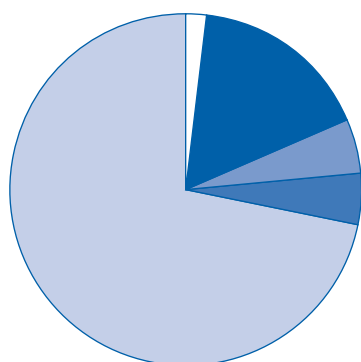
The growth in the number of UK households receiving multi-channel television is reflected in the BARB panel. There are currently 2,575 multi-channel homes on the panel, which is representative of the 47% of homes nationally that receive multi-channel television. BARB measures all the multi-channel platforms and the number of homes on the panel representing each platform is shown above right:

Platform	Panel Homes
Digital Satellite	1417
Analogue Satellite	18
Digital Cable	555
Analogue Cable	225
Digital Terrestrial Television	360

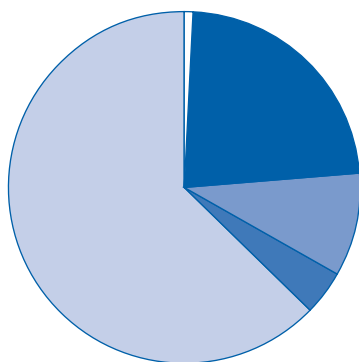
Since the March newsletter the number of panel homes with Digital Terrestrial Television has increased by 152 to 360, which reflects the increased penetration of Freeview.

The charts below show how digital broadcasts have taken a steadily increasing share of total in-home TV viewing. During September 2003, 38% of viewing took place via digital platforms, up from 23% for the same month two years ago. This includes digital viewing to BBC1, BBC2, ITV1, C4 and five. Digital Satellite (DSat) is currently the largest of the digital platforms, accounting for almost 25% of all viewing in September, while Digital Cable (DCab) was 10%. Digital Terrestrial (DTT) accounted for 3% of viewing, a significantly higher share for that platform than in September 2002, before the launch of Freeview.

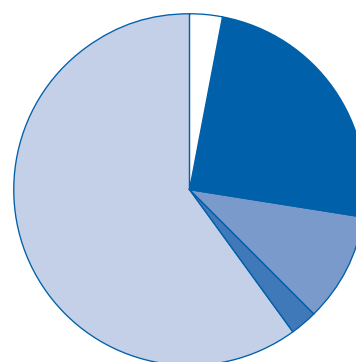
SHARE OF VIEWING BY PLATFORM - ALL INDIVIDUALS



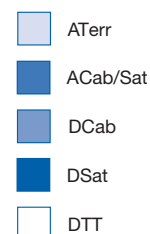
September 2001 - digital 23%



September 2002 - digital 33%



September 2003 - digital 38%



2001 CENSUS – IMPACT AND IMPLICATIONS

Universe changes

A BARB universe is the total population of an audience category in homes with televisions. The universe for 16-34 adults, for example, is the total number of 16-34 year olds living in UK households that have television sets. In common with all major research surveys, BARB will be incorporating the results of the latest ten-year government census data into the calculation of our population universe estimates. The results of the latest census, carried out in 2001, are being used to ensure BARB conforms to the official government definition of the demographic profile of the UK population, (nationally and by region) by age, sex and household size. In the ten years since the last government census, the profile of the UK population has changed and the published results are being used to produce the universe estimates. These updated universes will be released from January 2004. Further information, which is updated annually, such as the number of television sets and related equipment in the household, is ascertained from BARB's own Establishment Survey of UK television households.

The results from the 2001 census were widely publicised at the time of their release earlier this year. The Office for National Statistics has recognised that population projections for the intervening years since the previous census were not as robust as originally perceived. The results of the 2001 census have necessitated some significant readjustment in the population profile, in particular the number of younger men has declined and, within the male population, 25-34 year olds have declined by 9%, more than any other demographic.

BARB has calculated the effect of the universe changes by ITV region and the complete set of BARB audience universe categories is now available on the BARB website at www.barb.co.uk

Mapping Changes

We have been working throughout this year to introduce definitions of BARB's regional geography. These replace government administrative definitions and facilitate a more effective method of introducing population estimates incorporating data from the 2001 census.

Extension of the Genre Coding Service

We believe that broadcasters wish to have control over programme naming and genre

allocation, as they are best placed to know the correct conventions of their own schedules. To this end, the BARB genre coding service is now available to all BARB reported television channels and includes the ability to confirm programme titles which help maintain a consistent programme numbering convention.

We have always been dependent on broadcasters supplying programme logs with the appropriate information (start time, programme title etc.) in order to determine the overall week-in, week-out consistency of the data files. Logs are received daily and it is possible for programme titles to be compiled differently over time, which can lead to inconsistencies in the allocation of programme titles.

The originating broadcaster is required to confirm the origins of titles and genre allocation to facilitate a correctly maintained database. BARB then allocates viewing data to a unique title spelling. A unique identifier is also allocated to each programme so that different spellings of the same programme can be pulled together. This allows programme data to be correctly identified in analysis systems when producing, for example, trend data across a programme series.

Variations of title names are held together on the programme database with their title and allocated genre code (if provided). This is a constantly updated file that allows us to amend or correct a programme title or genre entry.

Interactivity

As reported in the March 2003 Newsletter, measuring interactive viewing is currently limited to the DSat platform and, where separate broadcasts are identifiable, via SI (Service Information) codes. Where interactive access does not have a unique SI code, our ability to report an event is limited. We are, however, able to identify where interactive access occurs when this additional information is provided by the broadcaster. We require the co-operation of other platform providers in order to obtain a similar level of measurement capability.

Having consulted with various industry parties, we now need to formulate proposals for how to best report the range of interactive services. As the various forms of interactive viewing – channels, programmes, commercials – all have differing requirements, a single approach to reporting interactivity is unlikely. Any extension to the current provision is also likely

to require the increasing involvement of all broadcasters in providing BARB with the relevant transmission information.

Sponsorship

We are currently drafting a specification to incorporate sponsorship measurement into the BARB reporting system. This will be reviewed by industry representatives to determine its acceptability. It is hoped that sponsorship measurement can be absorbed into the BARB measurement system with minimal disruption to broadcasters in the way they provide their programme logs.

Two components of the service have been identified as key to the measurement of sponsorship credits and will be incorporated into the service. First, there must be a systematic process by which the name of the sponsor is recorded so that analyses of sponsorship campaigns are consistent and, secondly, there must be a regular amendments process to prevent the reporting system from becoming too rigid.

The BARB Website

During the summer our website www.barb.co.uk was given a fresh new look and, as well as updating existing pages, we have included new sections.

In 'About BARB' there is now a glossary of BARB terminology and hyperlinks to other useful websites. The 'How to subscribe' section has also been expanded.

In the 'Subscriber' section we now provide BARB subscribers with monthly Universe updates for the 30 most popular audiences and the latest panel size. This section also contains an alphabetical list of all BARB subscribers. If you are a subscriber and do not have access to this section, please e-mail enquiries@barb.co.uk stating your name, company and job title and we will arrange access for you.

We have received encouraging feedback about our new look website which we will continue to develop and enhance. We welcome your views about its content and design.

We will be sending out further newsletters over the coming months to keep you up to date with developments.

