



Welcome to the summer edition of the BARB Newsletter. In this issue we include a feature on seasonal variations of viewing habits. There are updates on interactivity, sponsorship, Personal Video Recorders (PVRs) and behaviour of the BARB Panel, as well as an explanation of the source of the BARB Panel, the Establishment Survey.

SPONSORSHIP

On 28 June 2004, BARB started to offer a new test service, providing rating data for sponsored programmes and it is intended that the service will be fully operational in the autumn.

Broadcasters which participate in the service will provide details of sponsored transmissions. Official BARB ratings will then be matched up with these details to provide a record of the ratings achieved for the sponsorship. This data will be provided in a separate daily file which will be available for BARB subscribers to purchase.

During the second half of 2004, broadcasters have been invited to develop their reporting systems to enable the details of their sponsored output to be included.

For the first time BARB Gold Standard sponsorship data will be available.

INTERACTIVITY

BARB is currently measuring interactivity on the DSat platform for applications where separate broadcasts are identifiable (this is achieved via Service Information (SI) Codes). Measurement is dependent upon how a broadcaster is delivering interactive content. We require co-operation from other platform providers to offer this reporting more widely than the DSat platform.

BARB has continued its assessment of other potential techniques to extend the level of interactive measurement being reported. Active consultation is taking place with broadcaster representatives involved in interactive development. This is helping to assess the feasibility of each technique, and to define the nature and level of service that BARB may be able to provide.

Any acceptable solution may, however, necessitate a significant development of the current metering capability, the implications of which will need to be evaluated fully.

We will continue the consultation process throughout the coming months.

ESTABLISHMENT SURVEY

The Establishment Survey plays a fundamental role in the BARB process and is instrumental in developing and shaping the BARB panel.

Data on a range of individual and household characteristics are needed to ensure that the panel is fully representative of the UK population. These data are used to calculate targets (panel controls) which determine the number and type of homes to be recruited to the panel. As estimates for the large majority of panel controls are not available from the 2001 Census data, it is necessary to conduct an Establishment Survey to obtain this information.

The BARB Establishment Survey is carried out on a continuous basis and involves some 52,000 face-to-face interviews per year. It is a random probability survey, which means that any household within the UK has an equal likelihood of being selected for interview. The survey ensures that any changes taking place in the population can be identified so that the panel can be updated and adjusted to ensure that it continues to reflect the television-owning population. An example of these changes is the monthly updates for the multi-channel universes.

In addition to being the prime source of television population information providing the population universe estimates, the Multi-Channel Establishment Survey also generates the recruits from which the 5,100 reporting panel member homes are selected.

BARB produces two Establishment Survey Reports. The ITV and BBC area Establishment Surveys are published annually. The Multi-Channel Establishment Survey is produced on a quarterly basis and reports on the demographic profile of 33 of the BARB reported channels.

The Establishment Survey provides a raft of information which is used by many companies, such as broadcasters, advertisers and research consultants, including data about:

- Television ownership
- Television reception
- Ownership of television related equipment
- Demographic characteristics of television homes within each broadcast region

The Establishment Survey is available direct from BARB.

PVR MEASUREMENT

Sky has been working on set-top box software that would allow the BARB meter to access viewing that is timeshifted in any way, whether time-delayed from pause, or subsequent play back of recorded programmes. The final development of this software is expected later this year, to enable BARB to fully report all viewing via the Sky+ box.

BARB will also be testing new metering technology over the summer period. This evaluation will include whether this new equipment has the ability to extend the PVR capability to other platforms where there is no BARB access directly via the set-top box.

PANEL UPDATE

The panel continues to deliver the designed number of homes both nationally and regionally. The Network panel has been consistently reporting at over its target size of 5,100 homes. All of the ITV regions have also been reporting at or above their targets.

Consistency of panel performance is continuously monitored through an extensive range of quality control checks. Extremes of viewing behaviour are investigated and verified.

Other indicators, such as dropout rate – the level at which homes

leave the panel, which is currently tracking at a rate of 25% per annum - are within the range expected.

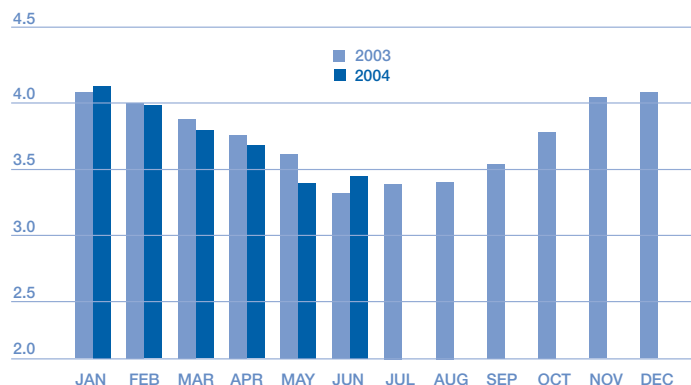
SEASONAL VIEWING HABITS

Television viewing varies seasonally and we are now at the time of year when viewing tends to be at its lowest level. During the summer months the average time spent watching television daily is approximately 3 hours 20 minutes per individual, compared with around 4 hours per individual during the winter.

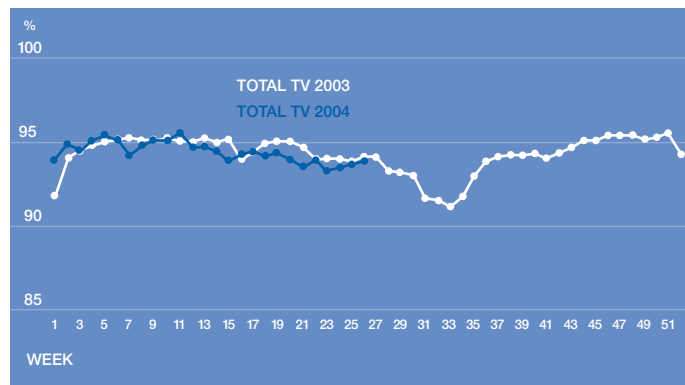
The charts illustrate the difference between summer and winter viewing levels with year on year comparisons. Although the pattern of viewing through the day is broadly similar, in winter viewing levels rise steeply during the early evening and reach their peak between 8.30pm and 9.00pm, while in the summer viewing rises more gradually and peaks slightly later. This is particularly evident at the weekend.

There is also a certain amount of seasonal change in weekly reach, that is, the percentage of the television population that has watched television during the week, although this does not vary as widely as viewing time. In fact, for much of the summer reach of television is only marginally below its winter levels. As might be expected, the lowest levels of reach are seen when viewers are most likely to be on holiday, during July and August.

AVERAGE DAILY VIEWING HOURS INDIVIDUALS 4+

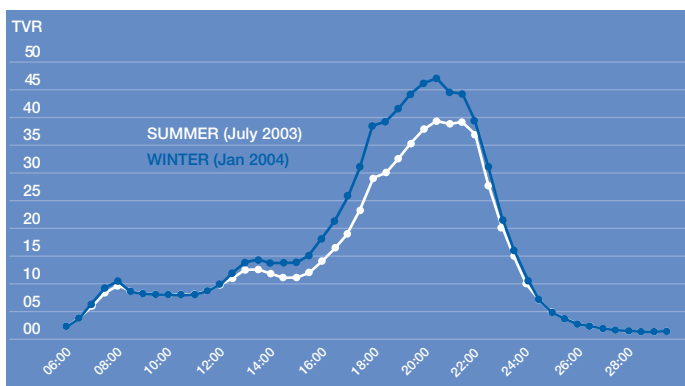


WEEKLY REACH INDIVIDUALS 4+, ALL TV



VIEWING THROUGH THE DAY WEEKDAY

Network Individuals, Total TV



VIEWING THROUGH THE DAY WEEKEND

Network Individuals, Total TV

