



BARB recently announced an extension of our research contracts, which is covered in this issue of the newsletter, together with updates on Lifestyle Insights and BARB's current capability for reporting interactivity. With Christmas nearly upon us we also take a look at viewing during the festive season.

Contract Extension

BARB has announced that we have taken up the options to extend our research contracts for three years from 1st January 2007. The contracts were issued to run from 2002 to 2006 with options to extend to 2009.

The current BARB measurement system was designed for the digital television environment and remains the most relevant base for the foreseeable future. The BARB methodology is a proven means of conducting television audience measurement and providing a representative assessment of television viewing in the UK. Throughout this year, BARB has thoroughly reviewed the provision of the service and the flexibility for future developments available in the contracts. We expect to maintain and expand the relevance of the BARB system by continual exploration of new methods and technologies and, where appropriate, integrate new approaches to upgrade the system.

During the next five years BARB will continue to develop the service. It has already been expanded, with the facility to report ratings against sponsored programmes. We will shortly be issuing the results of our Lifestyle Insights survey, which will complement standard audience viewing data with additional panel classifications, covering how viewers spend their time and their money. New developments capable of measuring PVRs are being integrated into the BARB system and we expect to start reporting PVR playback in the first half of 2005. We are progressing with investigations into techniques to expand the measurement of interactive services (see over).

The four BARB audience measurement contracts are held by three companies:

RSMB is responsible for the overall survey and sample design, producing the most appropriate means to ensure the integrity of the BARB panel in representing the UK television viewing audience, developing the highest standard of audience calculation methodology and ensuring that the best systems of quality control are in place to ensure that BARB delivers the highest standard of television audience measurement research.

Ipsos UK is responsible for the BARB Establishment Survey, including questionnaire design, random address selection, conducting the survey and producing the results. This survey produces detailed independent estimates of the characteristics of the UK television viewing population, as well as providing a pool of homes from which the panel is recruited.

ATR UK has responsibility for two BARB contracts. One deals with recruiting the panel homes and providing the metering equipment used to collect viewing data from those homes. The other contract is concerned with processing and distributing the data.

The UK is one of the world's most advanced TV markets to measure and BARB's goal is to continue to provide this world-leading UK television market with an objective, credible, gold-standard service.

Throughout next year we will be consulting with the industry on future needs and we plan to share our thinking on options for detection techniques and methodologies for the years ahead.

- BARB provides in-home TV viewing measurement for the UK
- This is obtained from a panel of 5,100 homes
- These homes return data from around 11,500 viewers
- Viewing by visitors to the home is included (guest viewing)
- Viewing figures are available to subscribers the morning after transmission
- VCR playback is incorporated within 7 days of transmission
- Audiences are reported on a minute-by-minute basis
- The panel design is representative of the whole of the UK
- People are recruited from all sectors of the population
- All viewing environments in the home are represented
- Multiple TV sets are measured
- BARB measures both analogue and digital delivery via cable, satellite and terrestrial distribution

Interactive Measurement

At the recent ASI 2004 European Television Symposium BARB outlined some of the steps it has been taking on interactive measurement. Challenges are being faced in the UK ahead of many other countries and BARB is at the forefront of development for reporting interactive services.

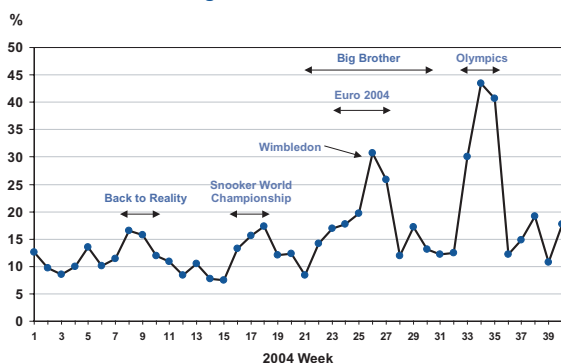
BARB already provides data on usage of interactive applications from the digital satellite platform, where these services are separately identifiable as part of the broadcast (via a specific Service Information code). The data shows that programme-related interactive applications are used in a typical week by 10-15% of individuals in homes with digital satellite. There is a dramatic increase in the use of interactivity when tied into a particular event, such as Wimbledon or The Olympics, for example, over 40% viewed interactive content during the two weeks covered by the Olympics. A summary of weekly use of interactive content by individuals within digital satellite homes is shown in the chart.

To extend current reporting, new detection techniques are being investigated to determine which has the best potential for the future. These include identifying infrared activity to tag a minute as 'interactive time', the extension of the use of audio detection for certain types of interactive content (currently part of the range of techniques available to BARB for identification of TV content) and two possible methods of inserting codes into the video output - video watermarking and video bar-coding.

Each technique is being assessed according to the amount of information that could be captured, the type of data that could be expected as output, the level it would be statistically appropriate to report and, ultimately, whether it will deliver to the industry something of value.

Interactive Live Weekly Reach, 2004

% Reach of Digital Satellite Individuals



Website Update

Visit the BARB website at www.barb.co.uk to see what's new. The top 30 programmes for terrestrial channels are now available within the Viewing Summary section, accessible to all. We encourage feedback about our website, so tell us what you think!



BARB 18 Dering Street, London W1S 1AQ

Telephone 020 7529 5529 Fax 020 7529 5530 Website www.barb.co.uk

Suzanne Wilkinson – Commercial Director, Tony Wearn – Research Director

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

Lifestyle Insights Classifications

Responses to our Lifestyle Insights questionnaire have now been returned by our panel members. They are being processed and compiled in a format that will allow users to add greater depth to the current range of individual and household classifications. These extra classifications include types of holiday undertaken, financial investments and type of car owned.

The file containing all of the questionnaire responses will be available in January, with top-line findings available before the end of the year.

Christmas Viewing

As we approach the end of the year and the days get shorter, television viewing levels tend to increase. During the Christmas period viewing is particularly high relative to other times of year. This is most apparent on the main public holidays. The chart shows average daily television viewing across this period last year for Individuals 4+.

Average viewing on Christmas Day 2003 was just under 5 hours per head, compared with an average for the year as a whole of 3 hours 44 minutes. Although the Christmas Day programme schedules attract the majority of the press coverage about TV at this time of year, viewing levels are actually often higher on New Year's Day. This was the case last year, when average viewing on New Year's Day 2004 exceeded 5 hours per head.

Average Viewing by Day, Christmas and New Year 2003/4

