

SUMMARY

This issue of Trends in Television is the fifth in a new series. All the data contained in the previous reports is continued, but some new tables have been added, allowing the relative performance of broadcasters' complete portfolios to be reviewed, and presenting an analysis of channels' impacts aggregated by sales houses.

Most trend data is confined to the period of the current BARB contract, but as before, some data is shown from the previous contract period to provide a context. Care should be taken in comparing data from the two different panels.

Overall viewing levels have declined to the lowest first quarter level for five years (discounting the probably artificially low figure for 2002). (Table 1)

There are no notable changes to channel share this quarter, except for an improvement by Channel Four from its low share last quarter. Non-terrestrial viewing continues its progress upwards in share. (Table 2)

BBC1 achieved a higher share during the second half of this quarter, especially during the week ending 13th March. (Table 3)

Demographically, channel performances retain much the same pattern as they have held for some time now. The strong bias of the non-terrestrial audience to the young age groups remains the key feature of these tables. (Tables 4 and 5) Note that new audience categories have been added to this table

The table which shows shares by platform has not been published this quarter whilst we undertake a review of the definitions used in the compilation of this table. (Table 6)

Digital reception is now heading strongly towards 60%. Digital terrestrial reception continues to be the fastest growing platform. (Table 7 - now a separate table)

Channels Four and Five have improved their patronage since a year ago, but the BBC channels and ITV show slight decline. (Table 8)

A new table now shows channel shares accumulated by broadcasting company. (Table 9)

Another new table shows channel impact shares accumulated by the sales houses representing them. This shows strong growth from the smaller ITV channels (ITV2, ITV3, and ITV News). This is attributable in part to the launch of ITV3 in November last year (Table 10), but ITV2 has also shown strong growth. (Table 10)



TRENDS IN TELEVISION VIEWING

Quarter 1 2005

Produced in association with OMD UK

July-05

TABLE 1

AVERAGE DAILY HOURS OF VIEWING - ALL TV

ALL INDIVIDUALS

	<u>Qtr 1</u>	<u>Qtr 2</u>	<u>Qtr 3</u>	<u>Qtr 4</u>	<u>FULL YEAR</u>
OLD PANEL					
<i>1991</i>			<i>3.41*</i>	<i>4.09</i>	#
<i>1992</i>	<i>4.13</i>	<i>3.52</i>	<i>3.55</i>	<i>4.03</i>	<i>3.81</i>
<i>1993</i>	<i>4.07</i>	<i>3.41</i>	<i>3.34</i>	<i>3.93</i>	<i>3.69</i>
<i>1994</i>	<i>3.91</i>	<i>3.38</i>	<i>3.28</i>	<i>3.82</i>	<i>3.60</i>
<i>1995</i>	<i>3.94</i>	<i>3.38</i>	<i>3.21</i>	<i>3.84</i>	<i>3.59</i>
<i>1996</i>	<i>3.95</i>	<i>3.39</i>	<i>3.25</i>	<i>3.78</i>	<i>3.59</i>
<i>1997</i>	<i>3.89</i>	<i>3.41</i>	<i>3.29</i>	<i>3.77</i>	<i>3.59</i>
<i>1998</i>	<i>3.84</i>	<i>3.46</i>	<i>3.34</i>	<i>3.78</i>	<i>3.61</i>
<i>1999</i>	<i>3.91</i>	<i>3.48</i>	<i>3.35</i>	<i>3.93</i>	<i>3.67</i>
<i>2000</i>	<i>3.86</i>	<i>3.49</i>	<i>3.43</i>	<i>3.91</i>	<i>3.67</i>
<i>2001</i>	<i>3.95</i>	<i>3.46</i>	<i>3.34</i>	<i>3.75</i>	<i>3.62</i>
NEW PANEL					
2002	3.54	3.47	3.36	3.80	3.54
2003	3.99	3.55	3.41	3.95	3.73
2004	4.00	3.50	3.46	3.89	3.71
2005	3.91				

NOTES: 1. New panel commenced on 1st January 2002
 2. Figures italics refer to previous panel

* = Average of 8 weeks ending Sept 29th 1991 - new panel data only
 # = No average quoted because of panel change

TABLE 2

TRENDS IN AUDIENCE SHARE BY CHANNEL - ALL INDIVIDUALS

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	FIV1 + GMTV %	CH4 %	Five %		%	%
2002 - Qtr 2	27.2	10.7	24.2	10.2	6.4	78.7	21.3	100.0
2002 - Qtr 3	25.7	11.3	23.6	10.4	6.3	77.4	22.6	100.0
2002-Qtr 4	26.6	11.6	23.9	9.5	6.2	77.8	22.2	100.0
2003 - Qtr 1	26.4	11.2	24.0	9.2	6.4	77.2	22.8	100.0
2003 - Qtr 2	25.5	10.7	23.6	9.8	6.5	76.1	23.9	100.0
2003 - Qtr 3	25.1	11.0	23.2	10.1	6.5	75.9	24.1	100.0
2003 - Qtr 4	25.4	11.1	23.8	9.6	6.5	76.3	23.7	100.0
2004 - Qtr 1	24.9	10.9	24.0	9.4	6.6	75.8	24.2	100.0
2004 - Qtr 2	24.8	9.7	22.5	10.1	6.9	74.0	26.0	100.0
2004 - Qtr 3	25.4	9.8	21.0	10.5	6.4	73.1	26.9	100.0
2004 - Qtr 4	23.8	9.6	23.3	9.0	6.4	72.1	27.9	100.0
2005 - Qtr 1	23.7	9.6	22.3	9.7	6.4	71.7	28.3	100.0

TABLE 3

WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

Week Ending-	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	TIV + GMTV %	CH4 %	Eire %		%	%
09.01.05	23.1	9.5	21.9	10.4	6.5	71.3	28.7	100.0
16.01.05	22.5	9.5	21.9	10.7	6.5	70.9	29.1	100.0
23.01.05	22.8	9.4	22.0	10.7	6.6	71.4	28.6	100.0
30.01.05	23.2	9.7	23.2	10.0	5.9	72.0	27.9	100.0
06.02.05	23.2	9.8	21.8	10.6	6.1	71.4	28.6	100.0
13.02.05	23.7	9.1	23.1	9.5	6.8	72.1	27.9	100.0
20.02.05	23.8	9.6	21.7	9.0	7.2	71.2	28.8	100.0
27.02.05	24.0	9.6	22.4	9.6	6.5	72.2	27.8	100.0
06.03.05	22.8	10.2	23.7	9.6	6.4	72.7	27.4	100.0
13.03.05	26.6	10.2	21.3	8.9	6.4	73.4	26.6	100.0
20.03.05	24.2	9.5	23.2	8.9	6.4	72.1	27.9	100.0
27.03.05	24.8	9.5	21.7	8.5	6.3	70.8	29.2	100.0
03.04.05	24.0	9.1	22.1	9.3	6.2	70.7	29.3	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 3rd APRIL 2005

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	ITV + GMTV %	CH4 %	Five %			
All Individuals	23.8	9.6	22.3	9.7	6.5	71.8	28.2	100.0
All Adults	24.5	10.0	23.0	9.8	6.6	73.9	26.1	100.0
Men	24.2	10.5	20.1	9.8	6.4	70.9	29.1	100.0
Women	24.9	9.5	25.3	9.9	6.7	76.2	23.8	100.0
Housewives	25.3	10.3	24.7	10.0	6.9	76.9	23.1	100.0
HW with children	20.0	6.0	21.1	9.5	6.3	62.6	37.4	100.0
16-34	19.2	6.1	17.8	12.8	6.2	62.1	37.9	100.0
35-54	22.4	8.3	21.5	9.4	6.5	68.1	31.9	100.0
55+	29.3	13.5	27.2	8.5	6.8	85.3	14.7	100.0
ABC1	26.1	10.1	20.0	10.7	5.4	72.3	27.7	100.0
C2DE	23.4	9.8	25.2	9.2	7.5	75.1	24.9	100.0
16-34 ABC1	20.0	6.5	16.3	14.4	5.5	62.6	37.4	100.0
35-54 ABC1	24.1	8.7	19.6	10.4	5.6	68.3	31.7	100.0
55+ ABC1	32.1	14.1	22.8	8.6	5.1	82.7	17.3	100.0
16-34 C2DE	18.5	5.8	19.1	11.5	6.7	61.6	38.4	100.0
35-54 C2DE	21.1	7.9	23.0	8.6	7.3	68.0	32.0	100.0
55+ C2DE	27.5	13.1	29.8	8.5	7.9	86.9	13.1	100.0
CHILDREN	17.1	6.4	16.5	8.3	5.0	53.2	46.8	100.0

TABLE 5

CHANNEL SHARES BY DEMOGRAPHICS - PEAK TIME (1800-2259)

ALL INDIVIDUALS - 13 W/E 3rd APRIL 2005

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	TIV + GMTV	CH 4	Five			
	%	%	%	%	%	%	%	%
All Individuals	25.3	8.5	28.1	9.8	6.7	78.3	21.7	100.0
All Adults	25.8	8.9	28.6	9.6	6.8	79.7	20.3	100.0
Men	25.0	9.6	25.8	9.6	7.0	77.0	23.0	100.0
Women	26.5	8.3	30.8	9.7	6.6	81.9	18.1	100.0
Housewives	26.6	9.0	30.4	9.6	6.9	82.2	17.8	100.0
HW with children	23.2	5.4	25.0	11.4	7.0	71.6	28.4	100.0
16-34	21.4	6.1	20.7	14.7	7.1	70.0	30.0	100.0
35-54	24.1	7.8	26.4	10.0	7.0	75.3	24.7	100.0
55+	29.5	11.2	34.4	6.7	6.4	88.2	11.8	100.0
ABC1	27.6	9.9	24.1	11.0	5.6	78.1	21.9	100.0
C2DE	24.4	8.1	32.2	8.5	7.8	81.0	19.0	100.0
16-34 ABC1	22.0	6.6	18.4	16.5	6.2	69.7	30.3	100.0
35-54 ABC1	25.6	8.8	23.3	11.2	5.9	74.8	25.2	100.0
55+ ABC1	32.9	12.8	28.3	7.4	4.9	86.4	13.6	100.0
16-34 C2DE	20.8	5.6	22.9	13.2	7.9	70.3	29.7	100.0
35-54 C2DE	22.7	6.8	29.3	8.9	8.0	75.8	24.2	100.0
55+ C2DE	27.2	10.1	38.5	6.2	7.5	89.2	10.8	100.0
CHILDREN	20.0	4.8	22.7	11.7	5.6	64.8	35.2	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 3rd APRIL 2005

This table has been withheld for this quarter pending a review of the definitions used

DEFINITION: For the purposes of this table, viewing is allocated according to the home's reception capability rather than the set being used. Thus viewing to any analogue sets in digital homes is classified as "digital" in this table.

TABLE 7

PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
01.04.02	5,583	2,223	974	8,716	15,865	1,637	14,013	24,528
	22.8	9.1	4.0	35.5	64.7	6.7	57.1	100
01.07.02	5,730	2,338	997	8,905	15,731	1,310	14,136	24,570
	23.3	10	4.1	36.2	64.0	5.3	57.5	100
01.10.02	6,105	2,292	763	9,015	15,645	1,148	14,265	24,613
	24.8	9	3.1	36.6	63.6	4.7	58.0	100
01.01.03	6,247	2,516	873	9,491	15,283	924	14,127	24,727
	25.3	10	3.5	38.4	61.8	3.7	57.1	100
01.04.03	6,372	2,156	1,398	9,718	15,101	1,222	13,647	24,772
	25.7	9	5.6	39.2	61.0	4.9	55.1	100
01.07.03	6,470	2,156	1,510	9,928	14,930	1,122	13,576	24,811
	26.1	9	6.1	40.0	60.2	4.5	54.7	100
01.10.03	6,600	2,250	1,710	10,354	14,544	1,010	13,303	24,857
	26.6	9	6.9	41.7	58.5	4.1	53.5	100
01.01.04	6,785	2,326	2,075	10,961	13,688	951	12,576	24,612
	27.6	9.5	8.4	44.5	55.6	3.9	51.1	100.0
01.04.04	6,830	2,356	2,695	11,579	13,088	921	12,011	24,667
	27.7	9.6	10.9	46.9	53.1	3.7	48.7	100.0
01.07.04	6,981	2,404	3,084	12,114	12,679	921	11,602	24,723
	28.2	9.7	12.5	49.0	51.3	3.7	46.9	100.0
01.10.04	7,001	2,555	3,451	12,632	12,241	813	11,272	24,779
	28.3	10.3	13.9	51.0	49.4	3.3	45.5	100.0
01.01.05	7,146	2,599	4,216	13,526	11,420	764	10,525	24,852
	28.8	10.5	17.0	54.4	46.0	3.1	42.4	100.0
01.04.05	7,337	2,645	4,674	14,107	10,874	718	10,031	24,900
	29.5	10.6	18.8	56.7	43.7	2.9	40.3	100.0

NOTE: Included in the total are a small number of homes (less than 1%) still receiving analogue satellite signals

TABLE 8

AVERAGE WEEKLY PATRONAGE* - CONSOLIDATED DATA

ALL INDIVIDUALS

	TERRESTRIAL					NON-TERRESTRIAL	ANY TV AT ALL
	BBC1	BBC2	ITV + GMTV	CH4	Five		
	%	%	%	%	%	%	%
2003 January	88.9	79.3	86.3	76.1	51.7	44.5	94.0
February	89.9	79.3	86.9	76.7	54.3	46.2	95.3
March	89.5	77.8	85.4	73.7	52.3	46.9	95.4
April	88.5	77.0	85.9	74.1	52.0	46.9	94.7
May	87.8	76.1	85.5	74.3	52.4	47.0	94.8
June	86.7	73.7	82.5	73.1	50.7	45.9	93.9
July	85.4	73.4	81.8	72.3	50.8	44.8	92.8
August	84.7	73.4	81.5	70.1	49.4	45.0	91.9
September	87.4	75.2	84.2	72.0	54.2	46.5	93.9
October	88.3	76.3	85.9	74.1	55.4	47.5	94.4
November	89.1	78.5	86.8	75.8	56.0	48.3	95.1
December	89.8	78.4	86.4	75.3	52.3	49.8	95.1
2004 January	89.3	77.9	85.9	74.8	54.0	50.2	94.7
February	88.2	75.6	85.7	74.3	55.5	50.2	94.9
March	88.4	75.9	84.8	73.2	56.2	51.7	95.1
April	87.2	71.7	84.3	72.7	53.4	52.1	94.5
May	85.3	70.7	82.1	71.9	52.4	52.0	94.1
June	86.1	69.6	83.3	72.5	50.6	52.0	93.5
July	84.3	69.6	79.6	72.5	50.0	52.0	92.9
August	83.8	72.2	77.3	68.2	49.8	51.5	91.2
September	85.7	70.5	81.7	69.4	54.7	53.2	93.6
October	86.2	71.2	83.1	70.7	55.7	54.6	94.3
November	87.5	72.7	84.7	74.0	56.5	56.0	95.1
December	87.6	72.2	84.0	73.8	56.0	56.5	94.5
2005 January	87.7	73.2	83.3	76.6	55.6	58.2	94.5
February	87.1	71.4	83.0	74.7	57.3	58.4	94.5
March	87.0	71.1	82.7	73.0	55.4	58.3	94.2

* Patronage is defined as the percentage of the population tuning to a channel for at least three minutes during the week

TABLE 9

TRENDS IN AUDIENCE SHARE BY BROADCASTER

	<u>BBC</u> %	<u>ITV</u> %	<u>CH4</u> %	<u>Five</u> %	<u>Sky</u> %	<u>UKTV</u> %	<u>Other Flextech</u> %	<u>Discovery Channels</u> %	<u>Other</u> %
<i>Includes:-</i>	BBC1 BBC2 BBC3 BBC4 BBC NEWS 24 CBBC/CBEEBIES	ITV1 ITV2 ITV3* ITN NEWS GMTV	CH4 E4 FILM FOUR J4C	Five	All Sky branded channels	All UK branded channels	All other Flextech channels:- Bravo Challenge Exc. Sports FIN Living Trouble	All Discovery branded channels & Animal	
2003 - Qtr 1	39.1	24.8	9.8	6.3	6.9	2.3	1.3	1.1	8.4
2003 - Qtr 2	37.6	24.5	10.8	6.4	6.6	2.3	1.6	1.2	9.0
2003 - Qtr 3	37.6	24.1	10.9	6.5	6.2	2.5	1.5	1.3	9.4
2003 - Qtr 4	37.9	24.8	10.0	6.3	6.5	2.4	1.4	1.3	9.4
2004 - Qtr 1	37.3	25.0	10.0	6.5	6.6	2.5	1.6	1.4	9.1
2004 - Qtr 2	36.2	23.6	11.2	6.9	6.3	2.6	1.9	1.4	9.9
2004 - Qtr 3	37.1	22.1	11.5	6.3	6.2	2.5	1.8	1.4	11.1
2004 - Qtr 4	35.7	25.2	9.5	6.4	6.9	2.7	1.8	1.2	10.6
2005 - Qtr 1	35.7	24.6 <i>* From Nov 2004</i>	10.5	6.4	6.9	2.7	1.9	1.6	9.7

TABLE 10

TRENDS IN IMPACTS SHARE BY SALES HOUSE

	<u>ITV1</u> %	<u>Other ITV</u> %	<u>GMTV</u> %	<u>CH4</u> %	<u>Five</u> %	<u>BSkyB</u> %	<u>IDS</u> %	<u>All others</u> %
<i>Includes:-</i>	<i>ITV1</i>	<i>ITV2</i> <i>ITV3*</i> <i>ITN NEWS</i>	<i>GMTV</i>	<i>CH4</i> <i>E4</i> <i>FILM FOUR</i> <i>S4C</i>	<i>Five</i>	<i>----- See Appendix -----</i>		
2003 - Qtr 1	43.3	1.6	2.8	16.7	10.8	11.2	6.5	7.1
2003 - Qtr 2	41.4	1.8	2.9	17.9	10.8	10.8	6.7	7.7
2003 - Qtr 3	40.0	1.9	3.0	17.5	11.1	11.0	7.1	8.4
2003 - Qtr 4	41.2	1.9	3.0	16.6	10.7	11.5	6.7	8.4
2004 - Qtr 1	41.7	1.8	2.9	16.2	10.7	11.4	7.3	8.0
2004 - Qtr 2	38.1	2	2.7	18.4	11.1	11.1	7.8	8.8
2004 - Qtr 3	36.3	2.2	2.9	19.1	10.7	11.3	8.1	9.4
2004 - Qtr 4	39.6	3.5	2.7	15.4	10.5	12.5	8.4	7.4
2005 - Qtr 1	37.4	4.3	2.7	16.9	10.6	12.2	8.6	7.3

* From Nov 2004

LIST OF CHANNELS

Sky wholly owned

Sky One
 Sky One Mix
 Sky Sports 1
 Sky Sports 2
 Sky Sports 3
 Sky Sports News
 Sky Sports Extra
 Premier Plus
 Sky Box Office
 Sky Sport Active 1 - 8
 The Amp
 Flaunt
 Scuzz
 Sky Movies 1 - 9
 Sky Cinema 1 - 2
 Sky News
 Sky Travel
 Sky Travel +1
 Sky Travel 5
 Sky Travel 2
 Sky Movies Active 1 - 8

Sky Sales

History
 History+1
 Nat Geog
 Nat Geog+1
 Nat G Adv1
 Hallmark
 Biograph
 FX
 MUTV
 B4
 Chart
 Vault

(Discovery)

Discovery+1
 Dis H&L
 Dis H&L+1
 Dis T&A
 Dis Civil
 Dis Sci
 Dis Wings
 Dis Health
 Animal
 Animal+1

(EMAP)

Box
 Kerrang
 Smash
 Magic
 Kiss
 Q Chan

IDS

Trouble
 Trouble R
 Bravo
 Bravo+1
 Challenge
 Challenge+1
 Living
 Living+1
 Living2
 Ex Sports
 FTN
(UKTV)
 UK Gold
 UK Gold+1
 UKG2
 UKG2+1
 UK Doc
 UK Doc+1
 UK Style
 UK Style+1
 UK Drama
 UK Food
 UK Food+1
 UK History
 UK History+1
 UK Bright
 UK People

