

SUMMARY

Most trend data in this report 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 television viewing levels are slightly lower than those reported for most previous first quarters. (Table 1)

With the notable exception of Channel 4, all the major terrestrial channels are losing share of audience due to the inexorable growth of the non-terrestrial channels, which now have a share of over 30% (Table 2). The positive impact of the Winter Olympics is evident on the weekly performance of BBC2. (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)

Table 5 has now been re-instated, and shows the performance of the major channels by platform. Analogue homes are now shown as a single row with no further breakdown. (Table 6)

Digital reception continues to grow. Digital terrestrial reception continues to grow rapidly and is now heading towards covering 30% of the television population. Digital television in all its forms is now in two thirds of television households (Table 7)

The non-terrestrial channels have extended their patronage significantly over the last year. The other channels have again shown a decline in their patronage compared to the same period last year, although Channel 4 has lost less than the others. (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. (Table 10)



TRENDS IN TELEVISION VIEWING

Quarter 1 2006

Produced in association with OMD UK

May 2006

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>
<i>OLD PANEL</i>					
<i>1991</i>			<i>3.41*</i>	<i>4.09</i>	<i>#</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	3.45	3.42	3.81	3.65
2006	3.89				

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 %	V1 + GM %	CH 4 %	Five %		%	%
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
2005 - Qtr 2	23.8	9.6	20.9	9.7	6.7	70.7	29.3	100.0
2005 - Qtr 3	22.2	9.3	20.5	11.0	6.5	69.5	30.5	100.0
2005 - Qtr 4	23.3	9.2	22.3	8.7	6.2	69.6	30.4	100.0
2006 - Qtr 1	22.4	9.4	20.6	10.0	5.9	68.4	31.6	100.0

TABLE 3

WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

Week Ending:-	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	<u>BBC1</u> %	<u>BBC2</u> %	<u>V + GMI</u> %	<u>CH4</u> %	<u>Five</u> %	<u>TOTAL</u> %	%	%
08.01.06	22.6	9.4	20.4	10.4	5.9	68.8	31.2	100.0
15.01.06	21.8	9.3	21.1	10.8	6.0	69.0	31.0	100.0
22.01.06	22.2	9.7	19.8	11.3	5.7	68.8	31.2	100.0
29.01.06	21.9	8.8	20.5	11.6	5.6	68.4	31.6	100.0
05.02.06	23.0	8.7	20.5	9.9	6.1	68.4	31.6	100.0
12.02.06	22.9	10.1	20.0	10.1	5.8	68.9	31.1	100.0
19.02.06	21.7	10.9	19.6	9.7	5.8	67.7	32.3	100.0
26.02.06	21.7	9.5	20.6	9.8	6.4	67.9	32.1	100.0
05.03.06	23.0	8.2	21.9	9.5	5.9	68.6	31.4	100.0
12.03.06	22.3	9.3	21.2	9.2	5.9	68.0	32.0	100.0
19.03.06	23.2	9.8	20.4	9.2	6.3	68.9	31.1	100.0
26.03.06	22.4	10.3	20.4	9.2	5.8	68.2	31.8	100.0
02.04.06	22.2	8.6	21.1	9.7	6.0	67.5	32.5	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 1st JANUARY 2006

	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	<u>BBC1</u>	<u>BBC2</u>	<u>V + GMI</u>	<u>CH 4</u>	<u>Five</u>	<u>TOTAL</u>	%	%
	%	%	%	%	%	%		
All Individuals	22.4	9.4	20.6	10.1	5.9	68.4	31.6	100.0
All Adults	23.3	9.8	21.2	10.2	6.1	70.7	29.3	100.0
Men	23.3	10.2	18.2	9.9	6.1	67.6	32.4	100.0
Women	23.3	9.5	23.7	10.6	6.1	73.2	26.8	100.0
Housewives	23.9	10.1	22.7	10.6	6.4	73.7	26.3	100.0
HW with children	17.9	5.8	19.1	9.9	5.7	58.4	41.6	100.0
16-34	17.2	6.4	16.2	12.8	5.7	58.3	41.7	100.0
35-54	20.7	8.0	19.8	9.9	6.0	64.3	35.7	100.0
55+	28.8	13.2	25.2	9.2	6.4	82.8	17.2	100.0
ABC1	24.7	10.6	18.5	10.5	5.3	69.6	30.4	100.0
C2DE	22.3	9.3	23.2	10.1	6.7	71.5	28.5	100.0
16-34 ABC1	18.4	7.5	14.6	13.7	5.5	59.6	40.4	100.0
35-54 ABC1	22.4	9.0	18.1	10.2	5.5	65.1	34.9	100.0
55+ ABC1	31.5	14.4	21.4	8.7	4.9	80.9	19.1	100.0
16-34 C2DE	16.2	5.5	17.5	12.0	5.9	57.1	42.9	100.0
35-54 C2DE	19.3	7.2	21.1	9.7	6.3	63.7	36.3	100.0
55+ C2DE	27.3	12.5	27.3	9.5	7.3	83.9	16.1	100.0
CHILDREN	13.8	5.9	14.7	8.0	4.5	46.9	53.1	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 1st JANUARY 2006

	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	<u>BBC1</u> %	<u>BBC2</u> %	<u>V + GMI</u> %	<u>CH 4</u> %	<u>Five</u> %	<u>TOTAL</u> %	%	%
All Individuals	23.7	9.4	26.2	9.5	6.0	74.9	25.1	100.0
All Adults	24.4	9.8	26.8	9.4	6.1	76.5	23.5	100.0
Men	24.3	10.1	23.7	9.1	6.3	73.4	26.6	100.0
Women	24.4	9.6	29.2	9.7	6.0	79.0	21.0	100.0
Housewives	24.9	10.1	28.4	9.5	6.2	79.1	20.9	100.0
HW with children	20.0	6.2	22.8	11.4	6.3	66.7	33.3	100.0
16-34	18.9	7.0	18.7	14.5	6.6	65.8	34.2	100.0
35-54	22.0	8.4	24.3	9.9	6.3	71.0	29.0	100.0
55+	29.0	12.4	32.7	6.5	5.7	86.3	13.7	100.0
ABC1	25.8	11.3	22.2	10.5	5.5	75.2	24.8	100.0
C2DE	23.2	8.7	30.4	8.6	6.6	77.5	22.5	100.0
16-34 ABC1	19.7	8.2	16.5	15.3	6.4	66.1	33.9	100.0
35-54 ABC1	23.5	9.9	21.1	10.9	5.9	71.3	28.7	100.0
55+ ABC1	31.9	14.5	26.7	7.1	4.5	84.8	15.2	100.0
16-34 C2DE	18.2	5.8	20.9	13.8	6.9	65.5	34.5	100.0
35-54 C2DE	20.6	6.9	27.2	9.1	6.8	70.7	29.3	100.0
55+ C2DE	27.1	11.1	36.6	6.0	6.4	87.3	12.7	100.0
CHILDREN	16.6	5.1	20.5	10.5	5.1	57.9	42.1	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 2nd APRIL 2006

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

TABLE 7

PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
01.01.03	6,247	2,516	873	9,491	15,283	924	14,127	24,727
	<i>25.3</i>	<i>10</i>	<i>3.5</i>	<i>38.4</i>	<i>61.8</i>	<i>3.7</i>	<i>57.1</i>	<i>100</i>
01.04.03	6,372	2,156	1,398	9,718	15,101	1,222	13,647	24,772
	<i>25.7</i>	<i>9</i>	<i>5.6</i>	<i>39.2</i>	<i>61.0</i>	<i>4.9</i>	<i>55.1</i>	<i>100</i>
01.07.03	6,470	2,156	1,510	9,928	14,930	1,122	13,576	24,811
	<i>26.1</i>	<i>9</i>	<i>6.1</i>	<i>40.0</i>	<i>60.2</i>	<i>4.5</i>	<i>54.7</i>	<i>100</i>
01.10.03	6,600	2,250	1,710	10,354	14,544	1,010	13,303	24,857
	<i>26.6</i>	<i>9</i>	<i>6.9</i>	<i>41.7</i>	<i>58.5</i>	<i>4.1</i>	<i>53.5</i>	<i>100</i>
01.01.04	6785	2326	2075	10961	13688	951	12576	24612
	<i>27.6</i>	<i>9.5</i>	<i>8.4</i>	<i>44.5</i>	<i>55.6</i>	<i>3.9</i>	<i>51.1</i>	<i>100.0</i>
01.04.04	6830	2356	2695	11579	13088	921	12011	24667
	<i>27.7</i>	<i>9.6</i>	<i>10.9</i>	<i>46.9</i>	<i>53.1</i>	<i>3.7</i>	<i>48.7</i>	<i>100.0</i>
01.07.04	6981	2404	3084	12114	12679	921	11602	24723
	<i>28.2</i>	<i>9.7</i>	<i>12.5</i>	<i>49.0</i>	<i>51.3</i>	<i>3.7</i>	<i>46.9</i>	<i>100.0</i>
01.10.04	7001	2555	3451	12632	12241	813	11272	24779
	<i>28.3</i>	<i>10.3</i>	<i>13.9</i>	<i>51.0</i>	<i>49.4</i>	<i>3.3</i>	<i>45.5</i>	<i>100.0</i>
01.01.05	7146	2599	4216	13526	11420	764	10525	24852
	<i>28.8</i>	<i>10.5</i>	<i>17.0</i>	<i>54.4</i>	<i>46.0</i>	<i>3.1</i>	<i>42.4</i>	<i>100.0</i>
01.04.05	7337	2645	4674	14107	10874	718	10031	24900
	<i>29.5</i>	<i>10.6</i>	<i>18.8</i>	<i>56.7</i>	<i>43.7</i>	<i>2.9</i>	<i>40.3</i>	<i>100.0</i>
01.07.05	7595	2609	4940	14577	10446	679	9650	24948
	<i>30.4</i>	<i>10.5</i>	<i>19.8</i>	<i>58.4</i>	<i>41.9</i>	<i>2.7</i>	<i>38.7</i>	<i>100.0</i>
01.10.05	7751	2649	5316	15149	9922	652	9153	24996
	<i>31.0</i>	<i>10.6</i>	<i>21.3</i>	<i>60.6</i>	<i>39.7</i>	<i>2.6</i>	<i>36.6</i>	<i>100.0</i>
01.01.06	7815	2703	6363	16162	9060	594	8349	25164
	<i>31.1</i>	<i>10.7</i>	<i>25.3</i>	<i>64.2</i>	<i>36.0</i>	<i>2.4</i>	<i>33.2</i>	<i>100.0</i>
01.04.06	7948	2748	6875	16748.0	8516.0	549	7850	25213
	<i>31.5</i>	<i>10.9</i>	<i>27.3</i>	<i>66.4</i>	<i>33.8</i>	<i>2.2</i>	<i>31.1</i>	<i>100.0</i>

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	CH 4	Five		
	%	%	%	%	%	%	%
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	59.0	94.5
February	87.1	71.4	83.0	74.7	57.3	59.0	94.5
March	87.0	71.1	82.7	73.0	55.4	58.9	94.2
April	86.4	68.6	81.7	72.8	55.0	58.9	94.0
May	85.0	67.8	81.7	70.7	53.7	59.6	93.5
June	82.8	67.9	77.8	69.5	50.6	59.0	92.6
July	81.7	67.8	76.9	69.0	51.0	58.6	91.6
August	80.3	66.7	75.3	71.1	50.2	57.8	90.5
September	83.8	66.6	79.6	71.6	53.4	60.6	93.1
October	85.3	67.9	80.1	71.3	54.4	61.8	93.9
November	86.5	71.6	82.3	72.5	54.9	62.3	94.7
December	86.1	71.3	81.5	72.6	54.3	62.4	93.9
2006 January	85.6	70.2	80.6	75.1	55.0	64.8	94.1
February	85.6	71.9	80.8	73.6	55.8	65.2	94.1
March	85.2	70.2	80.8	72.4	54.3	65.6	94.1

* 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>CH 4</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/CBEEBIE	ITV1 ITV2 ITV3* ITV4** ITN NEWS GMTV Men & M	CH 4 E4 FILM FOUR S4C More4***	Five	All Sky branded channels	All UK branded channels	All other Flextech channels:- Bravo Challenge Ex. Sports FTN Living Trouble	All Discovery branded channels & Animal	
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	35.8	24.6	10.5	6.5	6.3	2.6	2.0	1.6	10.1
2005 - Qtr 2	35.9	23.3	11.1	6.7	6.0	2.9	2.2	1.5	10.4
2005 - Qtr 3	34.1	23.1	12.7	6.5	6.1	2.9	1.9	1.6	11.1
2005 - Qtr 4	35.3	25.1	10.1	6.2	6.2	2.7	2.0	1.7	10.7
2006 - Qtr 1	34.7	23.8	12	5.9	6.7	3.1	1.8	1.5	10.5

* From Nov 2004

** From Nov 2005

*** from Oct 2005

TABLE 10

TRENDS IN IMPACTS SHARE BY SALES HOUSE

	<u>ITV1</u> %	<u>Other ITV</u> %	<u>GMTV</u> %	<u>CH 4</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>ITV4**</i> <i>Men & M</i>	<i>GMTV</i>	<i>CH 4</i> <i>E4</i> <i>FILM FOUR</i> <i>S4C</i> <i>More4***</i>	<i>Five</i>	<i>----- See Appendix -----</i>		
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
2005 - Qtr 2	34.7	4.3	2.8	18.0	11.3	11.9	8.8	8.2
2005 - Qtr 3	33.6	4.9	2.6	19.1	10.9	12.4	8.6	8
2005 - Qtr 4	36.8	5.3	2.5	15.6	10.2	13.1	8.6	7.9
2006 - Qtr 1	33.6	5.8	2.6	18.6	9.9	13	8.9	7.5

* From Nov 2004

** From Nov 2005

*** from Oct 2005

APPENDIX

LIST OF CHANNELS

Sky wholly owned

Sky One
 Sky Mix = Sky 2
 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 S
 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
 FTV
 Artsworld
 FX+
 Horror
 Races
 Reality
 Reality +1

(Discovery)

Discovery+1
 Dis H&L
 Dis H&L+1
 Dis T&A
 Dis Civil
 Dis Sci
 Dis Wings
 Dis Health
 Animal
 Animal+1
 Dis Real TM
 Dis Real +1
 Dis Kids
 Dis Real Ex

(EMAP)

Box
 Kerrang
 Smash
 Magic
 Kiss
 Q Chan
 Hits

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
 UK People +1
 UK Style Leg