

SUMMARY

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

Again we see overall viewing in decline. Recorded average daily hours of viewing for the first quarter are 3.85 hours - these are the lowest they have been for almost ten years – with the exception of the artificially low figures for 2002. (Table 1)

Viewing shares by channel by quarter are very similar to those of the previous quarter, with the non-terrestrial channels continuing at the slightly lower levels seen last quarter. (Table 2)

The weekly share taken by the non-terrestrial channels improved slightly towards the end of the quarter, probably reflecting the start (in some areas) of the school holidays. (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 6 is still withheld this quarter due to issues with definitions.

Table 7 detailing platform universe trends shows that digital reception continues to grow, this now stands at 73.5% of UK homes.

The non-terrestrial channels are now being viewed by 71% of the population during the course of a week. (Table 8)

Table 9 shows channel shares accumulated by broadcasting company. (Table 9)

Table 10 shows channel impact shares accumulated by the sales houses representing them.



TRENDS IN TELEVISION VIEWING

QTR 1 2007

Produced in association with OMD UK

May 2007

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>					
1991			3.41*	4.09	#
1992	4.13	3.52	3.55	4.03	3.81
1993	4.07	3.41	3.34	3.93	3.69
1994	3.91	3.38	3.28	3.82	3.60
1995	3.94	3.38	3.21	3.84	3.59
1996	3.95	3.39	3.25	3.78	3.59
1997	3.89	3.41	3.29	3.77	3.59
1998	3.84	3.46	3.34	3.78	3.61
1999	3.91	3.48	3.35	3.93	3.67
2000	3.86	3.49	3.43	3.91	3.67
2001	3.95	3.46	3.34	3.75	3.62
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	3.43	3.31	3.76	3.60
2007	3.85				

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					NON-TERRESTRIAL	TOTAL	
	<u>BBC1</u>	<u>BBC2</u>	<u>ITV1 + GMTV</u>	<u>CH 4</u>	<u>Five</u>			<u>TOTAL</u>
	%	%	%	%	%	%	%	
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
2006 - Qtr 2	23.5	8.6	19.9	10.4	5.7	68.0	32.0	100.0
2006 - Qtr 3	22.7	8.3	17.9	9.9	5.8	64.6	35.4	100.0
2006 - Qtr 4	22.5	8.8	19.9	8.8	5.5	65.5	34.5	100.0
2007 - Qtr 1	22.2	8.7	19.5	9.5	5.4	65.4	34.6	100.0

TABLE 3

WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

Week Ending:-	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	ITV + GMTV %	CH 4 %	Five %	TOTAL %	%	%
07.01.07	22.9	9.1	17.5	10.3	5.5	65.3	34.7	100.0
14.01.07	22.1	8.7	20.4	10.4	5.2	66.7	33.3	100.0
21.01.07	21.5	8.6	19.8	10.8	5.3	66.0	34.0	100.0
28.01.07	22.5	8.6	19.1	10.8	5.4	66.4	33.6	100.0
04.02.07	22.7	8.4	20.1	9.3	5.8	66.3	33.7	100.0
11.02.07	23.2	8.9	19.9	9.3	5.0	66.3	33.7	100.0
18.02.07	22.3	9.2	19.0	8.9	5.6	65.0	35.0	100.0
25.02.07	21.7	8.7	19.7	9.0	5.5	64.6	35.4	100.0
04.03.07	21.1	9.0	20.1	9.3	5.2	64.7	35.3	100.0
11.03.07	22.8	8.8	19.8	8.9	5.7	66.0	34.0	100.0
18.03.07	23.6	8.3	19.6	8.5	5.5	65.9	34.1	100.0
25.03.07	21.0	8.4	19.8	8.9	5.5	63.6	36.4	100.0
01.04.07	21.5	8.3	19.0	8.2	5.4	62.5	37.5	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 1st APRIL 2007

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4	Five		%	%
	%	%	%	%	%	%		%
All Individuals	22.2	8.7	19.5	9.5	5.4	65.3	34.6	100.0
All Adults	23.1	9.0	20.2	9.6	5.6	67.5	32.5	100.0
Men	23.1	9.5	17.0	9.1	5.5	64.1	35.9	100.0
Women	23.0	8.7	22.8	10.1	5.6	70.2	29.8	100.0
Housewives	23.7	9.2	22.0	10.0	5.9	70.8	29.2	100.0
HW with children	18.1	6.0	18.1	9.6	5.1	56.7	43.3	100.0
16-34	16.6	6.5	14.4	11.3	5.2	53.9	46.1	100.0
35-54	20.9	7.5	18.9	9.3	5.4	61.9	38.1	100.0
55+	28.3	11.6	24.4	9.1	5.9	79.4	20.7	100.0
ABC1	24.6	9.5	17.7	10.1	4.5	66.3	33.7	100.0
C2DE	22.0	8.7	22.1	9.3	6.3	68.3	31.7	100.0
16-34 ABC1	18.6	7.3	13.5	12.8	4.7	56.9	43.1	100.0
35-54 ABC1	22.3	8.0	17.3	9.5	4.5	61.5	38.5	100.0
55+ ABC1	30.8	12.4	20.8	8.8	4.5	77.3	22.7	100.0
16-34 C2DE	14.8	5.8	15.2	9.9	5.6	51.2	48.8	100.0
35-54 C2DE	19.7	7.1	20.1	9.1	6.1	62.2	37.9	100.0
55+ C2DE	26.8	11.1	26.6	9.2	6.8	80.5	19.5	100.0
CHILDREN	14.2	6.0	12.7	7.7	4.0	44.6	55.4	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 1st APRIL 2007

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4	Five		%	%
	%	%	%	%	%	%	%	%
All Individuals	23.2	9.0	24.7	9.3	5.7	71.9	28.1	100.0
All Adults	23.8	9.3	25.2	9.2	5.8	73.2	26.8	100.0
Men	23.5	9.7	22.3	8.8	5.8	70.1	29.9	100.0
Women	24.1	8.9	27.4	9.6	5.8	75.8	24.2	100.0
Housewives	24.4	9.4	26.8	9.5	5.9	76.0	24.0	100.0
HW with children	19.7	6.7	21.3	11.6	5.6	64.9	35.1	100.0
16-34	17.8	7.4	17.1	13.1	6.3	61.7	38.3	100.0
35-54	21.5	8.2	23.1	9.9	5.8	68.4	31.6	100.0
55+	28.7	11.1	30.9	6.7	5.6	82.9	17.1	100.0
ABC1	25.2	10.3	21.2	10.3	4.9	71.9	28.1	100.0
C2DE	22.7	8.4	28.4	8.3	6.5	74.3	25.7	100.0
16-34 ABC1	19.4	8.5	15.4	14.4	5.8	63.5	36.5	100.0
35-54 ABC1	22.5	9.2	20.6	10.6	4.9	67.8	32.2	100.0
55+ ABC1	31.4	12.5	25.3	7.6	4.4	81.1	18.9	100.0
16-34 C2DE	16.2	6.3	18.9	11.8	6.8	59.9	40.1	100.0
35-54 C2DE	20.5	7.3	25.3	9.3	6.5	68.9	31.1	100.0
55+ C2DE	26.9	10.1	34.5	6.2	6.3	84.0	16.0	100.0
CHILDREN	17.0	5.6	19.3	10.3	4.6	56.8	43.2	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 1st APRIL 2007

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

TABLE 7

PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
01.01.04	6785	2326	2075	10961	13688	951	12576	24612
	27.6	9.5	8.4	44.5	55.6	3.9	51.1	100.0
01.04.04	6830	2356	2695	11579	13088	921	12011	24667
	27.7	9.6	10.9	46.9	53.1	3.7	48.7	100.0
01.07.04	6981	2404	3084	12114	12679	921	11602	24723
	28.2	9.7	12.5	49.0	51.3	3.7	46.9	100.0
01.10.04	7001	2555	3451	12632	12241	813	11272	24779
	28.3	10.3	13.9	51.0	49.4	3.3	45.5	100.0
01.01.05	7146	2599	4216	13526	11420	764	10525	24852
	28.8	10.5	17.0	54.4	46.0	3.1	42.4	100.0
01.04.05	7337	2645	4674	14107	10874	718	10031	24900
	29.5	10.6	18.8	56.7	43.7	2.9	40.3	100.0
01.07.05	7595	2609	4940	14577	10446	679	9650	24948
	30.4	10.5	19.8	58.4	41.9	2.7	38.7	100.0
01.10.05	7751	2649	5316	15149	9922	652	9153	24996
	31.0	10.6	21.3	60.6	39.7	2.6	36.6	100.0
01.01.06	7815	2703	6363	16162	9060	594	8349	25164
	31.1	10.7	25.3	64.2	36.0	2.4	33.2	100.0
01.04.06	7948	2748	6875	16748	8516	549	7850	25213
	31.5	10.9	27.3	66.4	33.8	2.2	31.1	100.0
01.07.06	8082	2829	7326	17295	7999	496	7386	25263
	32.0	11.2	29.0	68.5	31.7	2.0	29.2	100.0
01.10.06	8218	2880	7646	17604	7737	445	7175	25312
	32.5	11.4	30.2	69.5	30.6	1.8	28.3	100.0
01.01.07	8320	2933	8831	18226	7167	368	6682	25319
	32.9	11.6	34.9	72.0	28.3	1.5	26.4	100.0
01.04.07	8335	3074	9233	18642	6788	288	6383	25380
	32.8	12.1	36.4	73.5	26.7	1.1	25.1	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	CH 4	Five		
	%	%	%	%	%	%	%
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
April	84.0	66.3	78.2	70.6	53.2	65.0	92.8
May	83.5	66.3	78.7	71.5	51.6	65.7	93.3
June	83.7	62.7	79.2	68.5	47.7	65.0	92.5
July	80.6	63.0	72.7	67.2	48.4	64.1	91.5
August	80.3	63.5	73.5	66.5	49.2	65.1	90.7
September	81.9	65.2	76.8	67.1	51.6	66.6	92.4
October	83.4	66.5	78.2	69.4	51.6	67.6	93.3
November	84.7	69.9	79.5	70.9	51.9	69.2	94.1
December	85.0	68.3	78.5	70.9	53.3	68.8	93.2
2007 January	85.2	69.2	78.8	74.7	52.6	70.2	94.3
February	85.2	71.5	79.2	72.9	53.7	70.8	94.6
March	84.4	68.8	78.4	70.3	51.4	70.8	94.3

* 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>Non-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/CBEEBIES		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	
2005 - Qtr 1	35.8	64.2	24.6	10.5	6.5	6.3	2.6	2.0	1.2	10.6
2005 - Qtr 2	35.9	64.1	23.3	11.1	6.7	6.0	2.9	2.2	1.6	10.1
2005 - Qtr 3	34.1	65.9	23.1	12.7	6.5	6.1	2.9	1.9	1.5	10.4
2005 - Qtr 4	35.3	64.7	25.1	10.1	6.2	6.2	2.7	2.0	1.6	11.1
2006 - Qtr 1	34.7	65.3	23.8	12	5.9	6.7	3.1	1.8	1.7	10.7
2006 - Qtr 2	34.9	65.1	22.9	12.7	5.7	7.0	3.0	2.0	1.5	10.5
2006 - Qtr 3	34.0	66.0	21.5	12.8	5.8	7.6	3.3	2.2	1.4	10.4
2006 - Qtr 4	34.3	65.8	23.7	11.0	6.1	7.1	3.2	2.1	1.5	11.3
2007 - Qtr 1	34.0	66.0	23.1	12.3	6.1	6.6	3.1	2.2	1.2	11.4

* 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>		
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	8.0
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	13.0	8.9	7.5
2006 - Qtr 2	31.7	5.7	3.0	20.6	9.8	12.2	9.1	7.9
2006 - Qtr 3	29.2	6.7	3.0	19.9	9.7	12.9	10.1	8.6
2006 - Qtr 4	32.5	6.8	2.2	16.8	10.2	13.6	9.8	8.1
2007 - Qtr 1	31.6	6.2	2.3	19.3	10.2	12.9	9.8	7.7

* 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