

## **SUMMARY**

Average daily hours of viewing of 3.97 hours were recorded for the first quarter of 2008 – this is the highest level they have been since the first quarter of 2004. (Table 1)

After a very good performance in the final quarter of 2007, BBC1's and ITV's shares have both fallen back to their previous levels. The non-terrestrial channels share of viewing continues to grow and now stands at 38.1%, compared to 36.4% in the first quarter of 2007. (Table 2)

The growth of the non-terrestrial channels' share of viewing can be seen progressing fairly steadily from week to week. (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)

The growth of digital terrestrial reception has slowed slightly this quarter, but still continues towards the 50% level – overall digital penetration reception now stands at 83%. (Table 6)

Patronage levels for the main channels (and for television overall) are at about the same levels as they were a year ago. Patronage of the non-terrestrial channels has now established itself at over 75%. (Table 7)

Table 8 shows channel shares accumulated by broadcasting company – the BBC takes the largest share with 33.3% of all viewing.

Table 9 shows channel impact shares accumulated by the sales houses representing them – here ITV dominates taking a 37.8% share across all its channels.

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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.



## **TRENDS IN TELEVISION VIEWING**

**QTR 1 2008**

**May 2008**

TABLE 1

## AVERAGE DAILY HOURS OF VIEWING - ALL TV

## ALL INDIVIDUALS

	Qtr 1	Qtr 2	Qtr 3	Qtr 4	FULL YEAR
<i>OLD PANEL</i>					
<i>1991</i>			3.41*	4.09	#
<i>1992</i>	4.13	3.52	3.55	4.03	3.81
<i>1993</i>	4.07	3.41	3.34	3.93	3.69
<i>1994</i>	3.91	3.38	3.28	3.82	3.60
<i>1995</i>	3.94	3.38	3.21	3.84	3.59
<i>1996</i>	3.95	3.39	3.25	3.78	3.59
<i>1997</i>	3.89	3.41	3.29	3.77	3.59
<i>1998</i>	3.84	3.46	3.34	3.78	3.61
<i>1999</i>	3.91	3.48	3.35	3.93	3.67
<i>2000</i>	3.86	3.49	3.43	3.91	3.67
<i>2001</i>	3.95	3.46	3.34	3.75	3.62
<b>NEW PANEL</b>					
<b>2002</b>	<b>3.54</b>	<b>3.47</b>	<b>3.36</b>	<b>3.80</b>	<b>3.54</b>
<b>2003</b>	<b>3.99</b>	<b>3.55</b>	<b>3.41</b>	<b>3.95</b>	<b>3.73</b>
<b>2004</b>	<b>4.00</b>	<b>3.50</b>	<b>3.46</b>	<b>3.89</b>	<b>3.71</b>
<b>2005</b>	<b>3.91</b>	<b>3.45</b>	<b>3.42</b>	<b>3.81</b>	<b>3.65</b>
<b>2006</b>	<b>3.89</b>	<b>3.43</b>	<b>3.31</b>	<b>3.76</b>	<b>3.60</b>
<b>2007</b>	<b>3.85</b>	<b>3.46</b>	<b>3.38</b>	<b>3.83</b>	<b>3.63</b>
<b>2008</b>	<b>3.97</b>				

## 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	% OF VIEWING TO ADVERTISING CHANNELS	
	BBC1	BBC2	ITV1 + GMTV	CH 4	CH4+1	Five				TOTAL
	%	%	%	%	%	%	%	%		
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	61.4
2006 - Qtr 2	23.5	8.6	19.9	10.4		5.7	68.0	32.0	100.0	61.5
2006 - Qtr 3	22.7	8.3	17.9	9.9		5.8	64.6	35.4	100.0	61.9
2006 - Qtr 4	22.5	8.8	19.9	8.8		5.5	65.5	34.5	100.0	61.7
2007 - Qtr 1	22.2	8.7	19.5	9.5		5.4	65.4	34.6	100.0	61.8
2007 - Qtr 2	22.2	8.6	18.8	8.8		5.3	63.6	36.4	100.0	61.6
2007 - Qtr 3	21.3	8.2	18.8	8.5		5.1	62.1	37.9	100.0	61.8
2007 - Qtr 4	22.4	8.6	19.7	7.6	0.5	4.8	63.5	36.5	100.0	61.4
2008 - Qtr 1	21.6	7.8	18.9	7.8	0.6	5.3	61.9	38.1	100.0	62.2

TABLE 3

## WEEKLY CHANNEL SHARES - THIS QUARTER

## ALL INDIVIDUALS

	TERRESTRIAL							NON- TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4	CH4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%	%
Week Ending:-									
06.01.08	22.1	9.4	17.3	8.0	0.6	4.6	62.1	37.9	100.0
13.01.08	21.1	8.6	20.1	8.2	0.5	5.0	63.5	36.5	100.0
20.01.08	21.5	8.0	20.0	8.0	0.6	4.7	62.9	37.1	100.0
27.01.08	22.0	7.8	19.2	7.9	0.5	5.1	62.5	37.5	100.0
03.02.08	22.1	7.8	18.8	7.8	0.6	5.2	62.3	37.7	100.0
10.02.08	23.2	7.7	18.2	8.0	0.6	5.1	62.8	37.2	100.0
17.02.08	21.8	7.2	18.2	7.6	0.6	6.0	61.4	38.6	100.0
24.02.08	20.9	7.6	19.5	7.8	0.6	5.5	61.9	38.1	100.0
02.03.08	21.2	7.8	20.0	7.9	0.5	5.5	62.9	37.1	100.0
09.03.08	21.9	7.6	19.0	7.4	0.6	5.8	62.2	37.8	100.0
16.03.08	22.0	7.1	19.9	7.2	0.5	5.9	62.6	37.4	100.0
23.03.08	20.2	7.1	17.7	8.1	0.6	5.4	59.1	40.9	100.0
30.03.08	20.7	7.0	18.0	7.7	0.6	5.0	59.0	41.0	100.0

TABLE 4

## CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

## ALL INDIVIDUALS - 13 W/E 30th MARCH 2007

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%
All Individuals	21.6	7.7	18.9	8.4	5.3	61.9	38.1	100.0
All Adults	22.5	8.0	19.5	8.6	5.4	64.1	35.9	100.0
Men	22.5	8.4	16.5	8.3	5.3	61.0	39.0	100.0
Women	22.5	7.7	21.9	8.8	5.5	66.5	33.5	100.0
Housewives	23.3	8.4	21.1	8.8	5.7	67.3	32.7	100.0
HW with children	17.2	5.0	18.3	8.4	4.9	53.7	46.3	100.0
16-34	15.3	5.1	14.0	9.8	4.7	48.9	51.1	100.0
35-54	20.6	6.9	18.6	8.5	5.3	59.9	40.1	100.0
55+	27.7	10.5	22.9	8.1	5.9	75.1	24.9	100.0
ABC1	24.2	8.7	16.9	8.8	4.4	62.8	37.2	100.0
C2DE	21.3	7.6	21.4	8.5	6.2	65.0	35.0	100.0
16-34 ABC1	17.4	6.0	12.9	10.3	4.2	50.8	49.2	100.0
35-54 ABC1	21.7	7.4	17.2	8.5	4.4	59.2	40.8	100.0
55+ ABC1	30.7	11.5	19.0	8.0	4.4	73.7	26.3	100.0
16-34 C2DE	13.5	4.2	15.0	9.3	5.1	47.2	52.8	100.0
35-54 C2DE	19.6	6.4	19.8	8.5	6.0	60.4	39.6	100.0
55+ C2DE	25.8	9.9	25.4	8.1	6.9	76.0	24.0	100.0
CHILDREN	12.6	4.8	13.3	6.4	4.0	41.0	59.0	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 30th MARCH 2007

	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%
All Individuals	23.2	8.3	22.7	8.6	5.6	68.4	31.6	100.0
All Adults	23.9	8.6	23.0	8.6	5.7	69.8	30.2	100.0
Men	23.5	8.9	20.2	8.4	6.0	67.0	33.0	100.0
Women	24.3	8.4	25.2	8.7	5.5	72.0	28.0	100.0
Housewives	24.7	9.0	24.3	8.6	5.8	72.3	27.7	100.0
HW with children	19.5	5.7	21.5	10.3	5.1	62.0	38.0	100.0
16-34	17.3	6.0	16.5	11.6	5.1	56.5	43.5	100.0
35-54	21.9	7.7	21.5	9.1	5.8	66.0	34.0	100.0
55+	28.8	10.6	27.3	6.7	5.9	79.3	20.7	100.0
ABC1	25.7	9.7	19.4	9.3	4.7	68.8	31.2	100.0
C2DE	22.4	7.7	26.0	8.0	6.5	70.6	29.4	100.0
16-34 ABC1	18.9	7.2	14.5	12.1	4.6	57.3	42.7	100.0
35-54 ABC1	23.1	8.7	19.3	9.5	4.9	65.6	34.4	100.0
55+ ABC1	32.2	12.2	22.5	7.3	4.5	78.7	21.3	100.0
16-34 C2DE	15.7	4.8	18.5	11.1	5.6	55.7	44.3	100.0
35-54 C2DE	20.6	6.8	23.6	8.7	6.6	66.3	33.7	100.0
55+ C2DE	26.4	9.6	30.7	6.2	6.9	79.7	20.3	100.0
CHILDREN	15.8	4.5	20.1	8.6	4.4	53.4	46.6	100.0

TABLE 6

## PLATFORM UNIVERSES - HOMES

	<b>Dig-sat</b>	<b>Dig-cable</b>	<b>Dig-terr</b>	<b>Total dig</b>	<b>Total anlg</b>	<b>Anlg cable</b>	<b>Anlg terr</b>	<b>All Platforms</b>
01.01.05	7146	2599	4216	<b>13526</b>	<b>11420</b>	764	10525	24852
	28.8	10.5	17.0	<b>54.4</b>	<b>46.0</b>	3.1	42.4	100.0
01.04.05	7337	2645	4674	<b>14107</b>	<b>10874</b>	718	10031	24900
	29.5	10.6	18.8	<b>56.7</b>	<b>43.7</b>	2.9	40.3	100.0
01.07.05	7595	2609	4940	<b>14577</b>	<b>10446</b>	679	9650	24948
	30.4	10.5	19.8	<b>58.4</b>	<b>41.9</b>	2.7	38.7	100.0
01.10.05	7751	2649	5316	<b>15149</b>	<b>9922</b>	652	9153	24996
	31.0	10.6	21.3	<b>60.6</b>	<b>39.7</b>	2.6	36.6	100.0
01.01.06	7815	2703	6363	<b>16162</b>	<b>9060</b>	594	8349	25164
	31.1	10.7	25.3	<b>64.2</b>	<b>36.0</b>	2.4	33.2	100.0
01.04.06	7948	2748	6875	<b>16748</b>	<b>8516</b>	549	7850	25213
	31.5	10.9	27.3	<b>66.4</b>	<b>33.8</b>	2.2	31.1	100.0
01.07.06	8082	2829	7326	<b>17295</b>	<b>7999</b>	496	7386	25263
	32.0	11.2	29.0	<b>68.5</b>	<b>31.7</b>	2.0	29.2	100.0
01.10.06	8218	2880	7646	<b>17604</b>	<b>7737</b>	445	7175	25312
	32.5	11.4	30.2	<b>69.5</b>	<b>30.6</b>	1.8	28.3	100.0
01.01.07	8320	2933	8831	<b>18226</b>	<b>7167</b>	368	6682	25319
	32.9	11.6	34.9	<b>72.0</b>	<b>28.3</b>	1.5	26.4	100.0
01.04.07	8335	3074	9233	<b>18642</b>	<b>6788</b>	288	6383	25380
	32.8	12.1	36.4	<b>73.5</b>	<b>26.7</b>	1.1	25.1	100.0
01.07.07	8382	3134	9811	<b>19213</b>	<b>6285</b>	228	5949	25442
	32.9	12.3	38.6	<b>75.5</b>	<b>24.7</b>	0.9	23.4	100.0
01.10.07	8493	3225	10545	<b>19877</b>	<b>5663</b>	173	5382	25503
	33.3	12.6	41.3	<b>77.9</b>	<b>22.2</b>	0.7	21.1	100.0
01.01.08	8752	3274	12017	<b>21104</b>	<b>4596</b>	131	4357	25633
	34.1	12.8	46.9	<b>82.3</b>	<b>17.9</b>	0.5	17.0	100.0
01.04.08	8808	3277	12239	<b>21316</b>	<b>4394</b>	148	4138	25696
	34.3	12.8	47.6	<b>83.0</b>	<b>17.1</b>	0.6	16.1	100.0

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



TABLE 7

## AVERAGE WEEKLY PATRONAGE\* - CONSOLIDATED DATA

## ALL INDIVIDUALS

	TERRESTRIAL					NON- TERRESTRIAL	ANY TV AT ALL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five		
	%	%	%	%	%	%	%
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
April	83.2	65.4	76.3	67.7	48.0	70.1	93.5
May	84.3	65.6	76.6	69.9	49.0	70.7	94.1
June	83.4	64.9	76.0	68.1	48.0	70.7	93.5
July	80.2	63.9	74.0	65.8	46.5	69.7	91.7
August	79.3	62.9	73.2	63.3	45.1	69.3	90.7
September	82.0	64.6	76.5	65.3	47.8	72.0	92.9
October	83.2	67.9	79.7	66.3	50.6	72.7	93.2
November	85.2	70.7	79.3	69.8	50.4	75.0	94.3
December	85.1	70.4	79.2	70.7	51.2	76.2	93.8
2008 January	85.2	69.2	78.9	72.0	50.8	77.3	94.1
February	83.6	67.4	77.7	70.0	53.5	77.7	94.1
March	83.9	67.4	78.6	69.7	56.1	78.3	94.1

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

TABLE 8

## TRENDS IN AUDIENCE SHARE BY BROADCASTER

	<b>BBC</b>	<b>Non-BBC</b>	<b>ITV</b>	<b>CH 4</b>	<b>Five</b>	<b>Sky</b>	<b>UKTV</b>	<b>Other Flextech</b>	<b>Discovery Channels</b>	<b>Other</b>
	%	%	%	%	%	%	%	%	%	%
<i>Includes:-</i>	BBC1		ITV1	CH 4	Five	All Sky branded	All UK branded	All other Flextech	All Discovery branded	
	BBC2		ITV2	E4	Five Life(+1)	channels	channels	channels:-	channels & Animal	
	BBC3		ITV3	FILM FOUR	Five US(+1)			Bravo		
	BBC4		ITV4**	S4C				Challenge		
	BBC NEWS 24		ITN NEWS	More4***				Ex. Sports		
	CBBC/CBEEBIES		GMTV	CH4+1				FTN		
			Men & M					Living		
								Trouble		
2006 - Qtr 1	34.7	65.3	23.8	12	5.9	6.7	3.1	1.8	1.5	10.5
2006 - Qtr 2	34.9	65.1	22.9	12.7	5.7	7	3	2	1.4	10.4
2006 - Qtr 3	34	66.0	21.5	12.8	5.8	7.6	3.3	2.2	1.5	11.3
2006 - Qtr 4	34.3	65.8	23.7	11.0	6.1	7.1	3.2	2.1	1.2	11.4
2007 - Qtr 1	34.0	66.0	23.1	12.3	6.1	6.6	3.1	2.2	1.2	11.4
2007 - Qtr 2	34.2	65.8	22.7	11.9	6.1	6.3	3.2	2.3	1.2	12.1
2007 - Qtr 3	33.4	66.6	23.1	11.9	6.0	6.1	3.2	2.3	1.3	12.8
2007 - Qtr 4	34.5	65.5	23.9	10.8	5.8	6.4	3.5	2.3	1.1	11.7
2008 - Qtr 1	33.3	66.7	23.4	11.7	6.3	6.1	3.5	2.2	1.2	12.3

\*\* From Nov 2005

\*\*\* from Oct 2005

TABLE 9

## TRENDS IN IMPACTS SHARE BY SALES HOUSE

	<b>ITV1</b>	<b>Other ITV</b>	<b>GMTV</b>	<b>CH 4</b>	<b>Five</b>	<b>BSkyB</b>	<b>IDS</b>	<b>All others</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<i>Includes:-</i>	<i>ITV1</i>	<i>ITV2</i>	<i>GMTV</i>	<i>CH 4</i>	<i>Five</i>	<i>----- See Appendix -----</i>		
		<i>ITV3</i>		<i>E4</i>				
		<i>ITN NEWS</i>		<i>FILM FOUR</i>				
		<i>ITV4**</i>		<i>S4C</i>				
		<i>Men &amp; M</i>		<i>More4***</i>				
				<i>CH4+1</i>				
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
2007 - Qtr 2	30.0	6.7	2.4	19.2	10.4	12.9	10.0	8.5
2007 - Qtr 3	30.8	7.6	2.3	19.5	10.6	9.7	10.5	9.0
2007 - Qtr 4	31.6	7.3	2.1	17.5	9.7	12.7	11.0	8.1
2008 - Qtr 1	30.0	7.8	2.1	18.9	10.5	12.3	10.7	7.9

\*\* From Nov 2005

\*\*\* from Oct 2005

## LIST OF CHANNELS

<b>Sky wholly owned</b>	<b>Sky Sales</b>	<b>(Discovery)</b>	<b>(EMAP)</b>	<b>IDS</b>
Sky One	History	Discovery+1	Box	Trouble
Sky Mix = Sky 2	History+1	Dis H&L	Kerrang	Trouble R
Sky Sports 1	Nat Geog	Dis H&L+1	Smash	Bravo
Sky Sports 2	Nat Geog+1	Dis T&A	Magic	Bravo+1
Sky Sports 3	Nat G Adv1	Dis Knowledge	Kiss	Challenge
Sky Sports News	Hallmark	Dis Sci	Q Chan	Challenge+1
Sky Sports Extra	Biograph	Dis Wings	Hits	Living
Premier Plus	FX	Dis Health		Living+1
Sky Box Office	MUTV	Animal		Living2
Sky Sport Active 1 - 8	B4	Animal+1		Ex Sports
The Amp	Chart	Dis Real TM		<b>(UKTV)</b>
Flaunt	Vault	Dis Real +1		UK Gold
Scuzz	FTV	Dis Kids		UK Gold+1
All Sky Movies	Artsworld	Dis Real Ex		UKG2
Sky Cinema 1 - 2	FX+	DMAX (+1)		UKG2+1
Sky News	Horror			UK Doc
Sky Travel	Races			UK Doc+1
Sky Travel +1	Reality			UK Style
Sky Travel (+1)	Reality +1			UK Style+1
Sky Travel Extra	Diva			UK Style 2
Sky Travel Shop	Zona Romantica			UK Drama
Sky Real Lives				UK Food
Sky Movies Active 1 - 8				UK Food+1
Diva				UK History
Zona Romantica				UK History+1
				UK Bright
				UK People
				UK People +1
				UK Style Leg
				All Setanta
				Virgin 1(+1)