

SUMMARY

Table 1 shows that the average daily hours of television viewing for all individuals stood at 3.96 hours for the first quarter of 2009 – maintaining the high levels recorded in previous quarters.

The share of total television viewing taken by the non-terrestrial channels continue to grow, now standing at 39.9% (Table 2)

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 this table. (Table 3)

86.5% of all homes now have digital reception capability, however, this figure is growing quickly at the moment as Digital Switchover gathers pace. (Table 4)

93.9% of all individuals claim to have viewed television at all in an average week – the average weekly patronages of the individual terrestrial channels are holding steady whilst the patronage of non-terrestrial channels again continues to grow, currently standing at 80.7% (Table 5)

Table 6 shows channel shares accumulated by broadcasting company. The BBC continues to take the largest share of viewing of any broadcaster at 32.8% - the BBC is followed by ITV with a 23.3% share. (Table 6)

Table 7 shows channel impact shares accumulated by the sales houses representing them. ITV has the largest with 28.1% for ITV1 only plus a further 8.5% share for the other ITV services. (Table 7)

Most trend data in this report are 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 2009

Published April 2009

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> | | | | | |
| 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 | 3.46 | 3.38 | 3.83 | 3.63 |
| 2008 | 3.97 | 3.57 | 3.54 | 3.88 | 3.74 |
| 2009 | 3.96 | | | | |

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 | |
|--------------|-------------|------|-------------|------|----------|------|-----------------|-------|-----------------|------|
| | BBC1 | BBC2 | ITV1 + GMTV | CH 4 | CH 4 + 1 | Five | TOTAL | % | | |
| | % | % | % | % | % | % | % | % | | |
| 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 | 61.4 |
| 2006 - Qtr 4 | 22.5 | 8.8 | 19.9 | 8.8 | | 5.5 | 65.5 | 34.5 | 100.0 | 61.5 |
| 2007 - Qtr 1 | 22.2 | 8.7 | 19.5 | 9.5 | | 5.4 | 65.4 | 34.6 | 100.0 | 61.9 |
| 2007 - Qtr 2 | 22.2 | 8.6 | 18.8 | 8.8 | | 5.3 | 63.6 | 36.4 | 100.0 | 61.7 |
| 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 | 61.6 |
| 2008 - Qtr 1 | 21.6 | 7.8 | 18.9 | 7.8 | 0.6 | 5.3 | 61.9 | 38.1 | 100.0 | 61.8 |
| 2008 - Qtr 2 | 21.7 | 7.8 | 18.8 | 7.8 | 0.7 | 5.0 | 61.8 | 38.2 | 100.0 | 61.4 |
| 2008 - Qtr 3 | 22.3 | 7.8 | 17.2 | 7.4 | 0.7 | 4.8 | 60.2 | 39.8 | 100.0 | 62.0 |
| 2008 - Qtr 4 | 21.6 | 8.0 | 18.8 | 7.0 | 0.7 | 4.9 | 61.0 | 39.0 | 100.0 | 62.4 |
| 2009 - Qtr 1 | 21.1 | 7.6 | 18.2 | 7.4 | 0.8 | 4.9 | 60.1 | 39.9 | 100.0 | 62.9 |

TABLE 3: CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 29th MARCH 2009

| | TERRESTRIAL | | | | | | NON-TERRESTRIAL | TOTAL |
|------------------|-------------|------|------------|----------|------|-------|-----------------|-------|
| | BBC1 | BBC2 | ITV + GMTV | CH 4/4+1 | Five | TOTAL | % | % |
| | % | % | % | % | % | % | | |
| All Individuals | 21.1 | 7.6 | 18.2 | 8.2 | 4.9 | 60.1 | 39.9 | 100.0 |
| All Adults | 22.0 | 8.0 | 18.8 | 8.4 | 5.0 | 62.2 | 37.8 | 100.0 |
| Men | 21.9 | 8.5 | 16.0 | 8.0 | 4.8 | 59.1 | 40.9 | 100.0 |
| Women | 22.2 | 7.6 | 21.1 | 8.7 | 5.2 | 64.8 | 35.2 | 100.0 |
| Housewives | 22.9 | 8.4 | 20.1 | 8.6 | 5.3 | 65.4 | 34.6 | 100.0 |
| HW with children | 16.6 | 4.6 | 17.5 | 8.6 | 4.7 | 52.0 | 48.0 | 100.0 |
| 16-34 | 14.5 | 5.0 | 13.2 | 9.6 | 4.1 | 46.5 | 53.5 | 100.0 |
| 35-54 | 19.7 | 6.7 | 17.8 | 8.3 | 4.9 | 57.4 | 42.6 | 100.0 |
| 55+ | 27.6 | 10.5 | 22.4 | 7.7 | 5.6 | 73.8 | 26.2 | 100.0 |
| ABC1 | 24.2 | 8.8 | 16.6 | 8.6 | 4.1 | 62.1 | 37.9 | 100.0 |
| C2DE | 20.4 | 7.4 | 20.5 | 8.2 | 5.8 | 62.3 | 37.7 | 100.0 |
| 16-34 ABC1 | 16.8 | 5.9 | 12.6 | 10.2 | 3.8 | 49.3 | 50.7 | 100.0 |
| 35-54 ABC1 | 21.4 | 7.4 | 16.6 | 8.3 | 4.1 | 57.8 | 42.2 | 100.0 |
| 55+ ABC1 | 30.9 | 11.8 | 18.8 | 7.8 | 4.2 | 73.5 | 26.5 | 100.0 |
| 16-34 C2DE | 12.5 | 4.3 | 13.8 | 9.1 | 4.4 | 44.1 | 55.9 | 100.0 |
| 35-54 C2DE | 18.2 | 6.1 | 18.9 | 8.3 | 5.6 | 57.1 | 42.9 | 100.0 |
| 55+ C2DE | 25.3 | 9.7 | 24.7 | 7.7 | 6.6 | 74.0 | 26.0 | 100.0 |
| CHILDREN | 11.8 | 4.0 | 12.6 | 6.6 | 3.4 | 38.3 | 61.7 | 100.0 |

TABLE 4

PLATFORM UNIVERSES - HOMES

| | Dig-sat | Dig-cable | Dig-terr | Total dig | Total anlg | Anlg cable | Anlg terr | All Platforms |
|----------|----------------|------------------|-----------------|------------------|-------------------|-------------------|------------------|----------------------|
| 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 |
| 01.07.07 | 8382 | 3134 | 9811 | 19213 | 6285 | 228 | 5949 | 25442 |
| | 32.9 | 12.3 | 38.6 | 75.5 | 24.7 | 0.9 | 23.4 | 100.0 |
| 01.10.07 | 8493 | 3225 | 10545 | 19877 | 5663 | 173 | 5382 | 25503 |
| | 33.3 | 12.6 | 41.3 | 77.9 | 22.2 | 0.7 | 21.1 | 100.0 |
| 01.01.08 | 8752 | 3274 | 12017 | 21104 | 4596 | 131 | 4357 | 25633 |
| | 34.1 | 12.8 | 46.9 | 82.3 | 17.9 | 0.5 | 17.0 | 100.0 |
| 01.04.08 | 8808 | 3277 | 12239 | 21316 | 4394 | 148 | 4138 | 25696 |
| | 34.3 | 12.8 | 47.6 | 83.0 | 17.1 | 0.6 | 16.1 | 100.0 |
| 01.07.08 | 8876 | 3336 | 12465 | 21506 | 4305 | 151 | 4046 | 25760 |
| | 34.5 | 13.0 | 48.4 | 83.5 | 16.7 | 0.6 | 15.7 | 100.0 |
| 01.10.08 | 9084 | 3379 | 12989 | 21618 | 4273 | 144 | 4021 | 25823 |
| | 35.2 | 13.1 | 50.3 | 83.7 | 16.5 | 0.6 | 15.6 | 100.0 |
| 01.01.09 | 9332 | 3442 | 14008 | 22294 | 3711 | 143 | 3460 | 25931 |
| | 36.0 | 13.3 | 54.0 | 86.0 | 14.3 | 0.6 | 13.3 | 100.0 |
| 01.04.09 | 9530 | 3465 | 14292 | 22483 | 3616 | 120 | 3388 | 25996 |
| | 36.7 | 13.3 | 55.0 | 86.5 | 13.9 | 0.5 | 13.0 | 100.0 |

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

TABLE 5

AVERAGE WEEKLY PATRONAGE* - CONSOLIDATED DATA

ALL INDIVIDUALS

| | TERRESTRIAL | | | | | NON-TERRESTRIAL | ANY TV AT ALL |
|------------|-------------|------|------------|------|------|-----------------|---------------|
| | BBC1 | BBC2 | ITV + GMTV | CH 4 | Five | | |
| | % | % | % | % | % | % | % |
| 2002 Qtr 4 | 88.0 | 78.1 | 84.9 | 74.8 | 52.4 | 43.3 | 93.3 |
| 2003 Qtr 1 | 89.6 | 79.3 | 86.5 | 75.8 | 53.2 | 45.8 | 94.8 |
| Qtr 2 | 87.7 | 75.6 | 84.7 | 73.9 | 51.7 | 46.6 | 94.5 |
| Qtr 3 | 85.8 | 74.0 | 82.4 | 71.5 | 51.4 | 45.3 | 92.9 |
| Qtr 4 | 89.0 | 77.6 | 86.3 | 75.0 | 54.6 | 48.5 | 94.8 |
| 2004 Qtr 1 | 88.7 | 76.6 | 85.5 | 74.2 | 55.1 | 50.7 | 94.9 |
| Qtr 2 | 86.3 | 70.7 | 83.3 | 72.4 | 52.2 | 52.0 | 94.1 |
| Qtr 3 | 84.7 | 70.7 | 79.7 | 70.1 | 51.6 | 52.3 | 92.7 |
| Qtr 4 | 87.1 | 72.1 | 83.9 | 72.9 | 56.1 | 55.7 | 94.6 |
| 2005 Qtr 1 | 87.2 | 71.8 | 82.9 | 74.6 | 56.0 | 59.0 | 94.4 |
| Qtr 2 | 84.6 | 68.1 | 80.2 | 70.9 | 52.9 | 59.1 | 93.3 |
| Qtr 3 | 82.0 | 67.0 | 77.4 | 70.6 | 51.7 | 59.1 | 91.8 |
| Qtr 4 | 86.0 | 70.3 | 81.3 | 72.1 | 54.5 | 62.2 | 94.1 |
| 2006 Qtr 1 | 85.4 | 70.7 | 80.7 | 73.6 | 55.0 | 65.2 | 94.1 |
| Qtr 2 | 83.7 | 64.9 | 78.7 | 70.0 | 50.6 | 65.2 | 92.9 |
| Qtr 3 | 80.9 | 63.9 | 74.3 | 66.9 | 49.7 | 65.3 | 91.5 |
| Qtr 4 | 84.4 | 68.4 | 78.8 | 70.5 | 52.2 | 68.6 | 93.6 |
| 2007 Qtr 1 | 84.9 | 69.7 | 78.7 | 72.4 | 52.5 | 70.6 | 94.4 |
| Qtr 2 | 83.7 | 65.3 | 76.3 | 68.7 | 48.4 | 70.5 | 93.7 |
| Qtr 3 | 80.4 | 63.7 | 74.4 | 64.7 | 46.4 | 70.2 | 91.7 |
| Qtr 4 | 84.6 | 69.7 | 79.4 | 69.0 | 50.7 | 74.6 | 93.8 |
| 2008 Qtr 1 | 84.3 | 68.1 | 78.4 | 70.6 | 53.2 | 77.7 | 94.1 |
| Qtr 2 | 83.2 | 64.9 | 76.4 | 66.6 | 50.5 | 77.0 | 93.6 |
| Qtr 3 | 80.3 | 65.2 | 72.7 | 62.5 | 48.9 | 75.6 | 91.6 |
| Qtr 4 | 83.3 | 67.9 | 77.7 | 67.0 | 51.9 | 78.1 | 93.4 |
| 2009 Qtr 1 | 83.7 | 65.7 | 77.4 | 68.3 | 50.9 | 80.7 | 93.9 |

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

TABLE 6

TRENDS IN AUDIENCE SHARE BY BROADCASTER

| | BBC | Non-BBC | ITV | CH 4 | Five | Sky | UKTV | Other Flextech | Discovery Channels | Other |
|-------------------|---------------|----------------|------------|-------------|-------------|-----------------|----------------|-----------------------|---------------------------|--------------|
| | % | % | % | % | % | % | % | % | % | % |
| <i>Includes:-</i> | BBC1 | | ITV1 | CH 4 | Five | All Sky branded | All UK branded | All other Flextech | All Discovery branded | |
| | BBC2 | | ITV2 | E4 | Fiver(+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 | | |
| 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 |
| 2008 - Qtr 2 | 33.5 | 66.5 | 23.6 | 11.7 | 6.1 | 5.7 | 3.3 | 2.2 | 1.2 | 12.7 |
| 2008 - Qtr 3 | 34.1 | 65.9 | 21.9 | 11.8 | 5.9 | 6.0 | 3.5 | 2.6 | 1.2 | 13.0 |
| 2008 - Qtr 4 | 33.4 | 66.6 | 24.0 | 11.2 | 6.0 | 6.3 | 3.6 | 2.5 | 1.2 | 11.8 |
| 2009 - Qtr 1 | 32.8 | 67.2 | 23.3 | 11.8 | 6.2 | 6.8 | 3.7 | 2.8 | 1.2 | 11.4 |

** From Nov 2005

*** from Oct 2005

TABLE 7

TRENDS IN IMPACTS SHARE BY SALES HOUSE

| | ITV1 | Other ITV | GMTV | CH 4 | Five | BSkyB | IDS | All others |
|-------------------|-------------|--------------------|-------------|------------------|--------------------|---------------------------------|------------|-------------------|
| | % | % | % | % | % | % | % | % |
| <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>Fiver(+1)</i> | | | |
| | | <i>ITN NEWS</i> | | <i>FILM FOUR</i> | <i>Five US(+1)</i> | | | |
| | | <i>ITV4**</i> | | <i>S4C</i> | | | | |
| | | <i>Men & M</i> | | <i>More4***</i> | | | | |
| | | | | <i>CH4+1</i> | | | | |
| 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 |
| 2008 - Qtr 2 | 29.9 | 7.8 | 2.1 | 18.8 | 10.5 | 12.3 | 10.7 | 7.9 |
| 2008 - Qtr 3 | 27.6 | 8.1 | 2.1 | 19.6 | 10.1 | 12.7 | 11.0 | 8.8 |
| 2008 - Qtr 4 | 29.0 | 8.9 | 2.0 | 18.1 | 10.0 | 13.2 | 10.7 | 8.2 |
| 2009 - Qtr 1 | 28.1 | 8.5 | 2.0 | 19.1 | 10.3 | 13.5 | 11.2 | 7.5 |

** From Nov 2005

*** from Oct 2005