

SUMMARY

This quarter two 2005 issue of Trends in Television is the sixth in a new series. All the data contained in the previous reports are 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.

As with the report for the previous quarter, the table (Table 6) showing channel shares by platform is blank. This table will be resumed once a review of some definitional issues has been completed.

Overall viewing levels are again low by comparison with those reported for previous second quarters (Table 1)

The increase in share taken by non-terrestrial channels has been almost exclusively at the expense of ITV, which reports what is probably its lowest ever quarterly share at 20.9%. (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 these tables. (Tables 4 and 5)

Note that new audience categories have been added to this table

Table 6:- see note above.

Digital reception continues to grow. Digital terrestrial reception remains the fastest growing platform. (Table 7)

The non-terrestrial channels continue to extend their patronage, showing a 6-7 point growth over the same period last year. (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 2 2005

Produced in association with OMD UK

Sept 2005

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			

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
	BBC1 %	BBC2 %	ITV1 + GMTV %	CH 4 %	Five %	TOTAL %	%	%
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
2005 - Qtr 2	23.8	9.6	20.9	9.7	6.7	70.7	29.3	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 %	%	%
10.04.05	24.6	9.4	21.9	8.9	6.3	71.1	28.9	100.0
17.04.05	24.2	8.9	21.8	9.5	7.1	71.5	28.5	100.0
24.04.05	22.9	9.7	21.9	9.3	7.0	70.8	29.1	100.0
01.05.05	22.8	10.7	20.1	11.0	6.8	71.4	28.6	100.0
08.05.05	22.9	10.3	21.2	9.2	7.2	70.8	29.3	100.0
15.05.05	23.4	8.7	22.2	9.2	6.3	69.8	30.1	100.0
22.05.05	25.6	9.5	21.6	8.3	6.1	71.1	28.8	100.0
29.05.05	23.0	8.9	22.6	9.7	6.6	70.8	29.2	100.0
05.06.05	23.5	10.0	19.1	10.1	6.5	69.2	30.8	100.0
12.06.05	22.9	9.9	20.4	9.9	6.6	69.7	30.3	100.0
19.06.05	22.9	9.8	19.9	9.4	7.1	69.1	30.8	100.0
26.06.05	24.9	8.8	19.6	10.8	6.7	70.8	29.3	100.0
03.07.05	25.3	9.8	19.4	11.3	6.5	72.3	27.8	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 3rd JULY 2005

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	ITV + GMTV %	CH 4 %	Five %	TOTAL %	%	%
All Individuals	23.9	9.6	21.0	9.7	6.7	71.0	29.0	100.0
All Adults	24.8	9.9	21.5	9.9	6.9	73.1	26.9	100.0
Men	24.0	10.7	19.1	9.8	6.6	70.3	29.7	100.0
Women	25.5	9.3	23.5	10.1	7.1	75.4	24.6	100.0
Housewives	25.8	10.0	22.8	10.1	7.3	76.0	24.0	100.0
HW with children	18.7	5.9	20.5	10.0	6.2	61.4	38.6	100.0
16-34	17.7	6.3	17.7	13.6	5.8	61.1	38.9	100.0
35-54	22.1	7.9	20.7	9.6	6.6	66.8	33.2	100.0
55+	31.2	13.6	24.3	8.0	7.8	84.9	15.1	100.0
ABC1	26.4	10.5	18.3	10.8	5.3	71.4	28.6	100.0
C2DE	23.7	9.5	23.8	9.3	8.0	74.4	25.6	100.0
16-34 ABC1	18.5	6.9	16.1	14.8	5.1	61.4	38.6	100.0
35-54 ABC1	24.2	8.8	18.3	10.5	5.4	67.2	32.8	100.0
55+ ABC1	34.3	14.9	19.8	8.1	5.2	82.3	17.7	100.0
16-34 C2DE	17.0	5.9	19.2	12.6	6.3	61.0	39.0	100.0
35-54 C2DE	20.3	7.2	22.6	8.8	7.5	66.5	33.5	100.0
55+ C2DE	29.4	12.9	27.0	8.0	9.2	86.4	13.6	100.0
CHILDREN	15.4	6.6	16.2	8.1	4.9	51.3	48.7	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 3rd JULY 2005

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	ITV + GMTV %	CH 4 %	Five %	TOTAL %	%	%
All Individuals	24.9	9.1	25.8	10.4	6.9	77.1	22.9	100.0
All Adults	25.5	9.5	26.2	10.4	7.1	78.5	21.5	100.0
Men	24.5	10.3	23.9	10.1	7.1	75.8	24.2	100.0
Women	26.2	8.8	28.0	10.6	7.0	80.7	19.3	100.0
Housewives	26.4	9.6	27.4	10.4	7.2	81.0	19.0	100.0
HW with children	21.2	5.5	24.2	12.4	6.7	70.1	29.9	100.0
16-34	19.4	6.1	20.9	16.0	6.5	68.9	31.1	100.0
35-54	23.3	7.6	24.8	10.7	7.0	73.5	26.5	100.0
55+	30.3	12.7	29.9	7.0	7.3	87.2	12.8	100.0
ABC1	27.2	10.6	21.6	11.8	5.6	76.8	23.2	100.0
C2DE	24.1	8.6	29.8	9.2	8.2	79.9	20.1	100.0
16-34 ABC1	19.7	6.9	18.7	17.4	5.8	68.5	31.5	100.0
35-54 ABC1	25.2	8.9	21.2	12.1	5.9	73.3	26.7	100.0
55+ ABC1	33.9	14.6	23.7	7.8	5.2	85.2	14.8	100.0
16-34 C2DE	19.1	5.4	23.0	14.6	7.2	69.4	30.6	100.0
35-54 C2DE	21.6	6.5	28.1	9.5	8.0	73.7	26.3	100.0
55+ C2DE	27.9	11.5	33.9	6.5	8.7	88.5	11.5	100.0
CHILDREN	18.6	4.7	21.7	11.3	5.2	61.6	38.4	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 3rd JULY 2005

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
01.07.02	5,730 <i>23.3</i>	2,338 <i>10</i>	997 <i>4.1</i>	8,905 <i>36.2</i>	15,731 <i>64.0</i>	1,310 <i>5.3</i>	14,136 <i>57.5</i>	24,570 <i>100</i>
01.10.02	6,105 <i>24.8</i>	2,292 <i>9</i>	763 <i>3.1</i>	9,015 <i>36.6</i>	15,645 <i>63.6</i>	1,148 <i>4.7</i>	14,265 <i>58.0</i>	24,613 <i>100</i>
01.01.03	6,247 <i>25.3</i>	2,516 <i>10</i>	873 <i>3.5</i>	9,491 <i>38.4</i>	15,283 <i>61.8</i>	924 <i>3.7</i>	14,127 <i>57.1</i>	24,727 <i>100</i>
01.04.03	6,372 <i>25.7</i>	2,156 <i>9</i>	1,398 <i>5.6</i>	9,718 <i>39.2</i>	15,101 <i>61.0</i>	1,222 <i>4.9</i>	13,647 <i>55.1</i>	24,772 <i>100</i>
01.07.03	6,470 <i>26.1</i>	2,156 <i>9</i>	1,510 <i>6.1</i>	9,928 <i>40.0</i>	14,930 <i>60.2</i>	1,122 <i>4.5</i>	13,576 <i>54.7</i>	24,811 <i>100</i>
01.10.03	6,600 <i>26.6</i>	2,250 <i>9</i>	1,710 <i>6.9</i>	10,354 <i>41.7</i>	14,544 <i>58.5</i>	1,010 <i>4.1</i>	13,303 <i>53.5</i>	24,857 <i>100</i>
01.01.04	6785 <i>27.6</i>	2326 <i>9.5</i>	2075 <i>8.4</i>	10961 <i>44.5</i>	13688 <i>55.6</i>	951 <i>3.9</i>	12576 <i>51.1</i>	24612 <i>100.0</i>
01.04.04	6830 <i>27.7</i>	2356 <i>9.6</i>	2695 <i>10.9</i>	11579 <i>46.9</i>	13088 <i>53.1</i>	921 <i>3.7</i>	12011 <i>48.7</i>	24667 <i>100.0</i>
01.07.04	6981 <i>28.2</i>	2404 <i>9.7</i>	3084 <i>12.5</i>	12114 <i>49.0</i>	12679 <i>51.3</i>	921 <i>3.7</i>	11602 <i>46.9</i>	24723 <i>100.0</i>
01.10.04	7001 <i>28.3</i>	2555 <i>10.3</i>	3451 <i>13.9</i>	12632 <i>51.0</i>	12241 <i>49.4</i>	813 <i>3.3</i>	11272 <i>45.5</i>	24779 <i>100.0</i>
01.01.05	7146 <i>28.8</i>	2599 <i>10.5</i>	4216 <i>17.0</i>	13526 <i>54.4</i>	11420 <i>46.0</i>	764 <i>3.1</i>	10525 <i>42.4</i>	24852 <i>100.0</i>
01.04.05	7337 <i>29.5</i>	2645 <i>10.6</i>	4674 <i>18.8</i>	14107 <i>56.7</i>	10874 <i>43.7</i>	718 <i>2.9</i>	10031 <i>40.3</i>	24900 <i>100.0</i>
01.07.05	7595 <i>30.4</i>	2609 <i>10.5</i>	4940 <i>19.8</i>	14577 <i>58.4</i>	10446 <i>41.9</i>	679 <i>2.7</i>	9650 <i>38.7</i>	24948 <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	%	%
2003 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	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

* 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/CBEEBIES	ITV1 ITV2 ITV3* ITN NEWS GMTV	CH 4 E4 FILM FOUR S4C	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	
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	35.8	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

*From Nov 2004

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>GMTV</i>	<i>CH 4</i> <i>E4</i> <i>FILM FOUR</i> <i>S4C</i>	<i>Five</i>	<i>----- See Appendix -----</i>		
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
2005 - Qtr 2	34.7	4.3	2.8	18.0	11.3	11.9	8.8	8.2

* From Nov 2004

APPENDIX

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 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

(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

(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