

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 viewing levels continue to show a decline. This is the seventh successive quarter that overall television viewing has recorded a year on year decline.

The major channels continue to suffer from the inexorable growth of the non-terrestrial channels, which have now consolidated their share at over 30%. Channel Four has, however, had another good quarter. (Table 2)

Some small effect from the World Cup is seen in the share figures for BBC1 and ITV. (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) Note that new audience categories have been added to this table

Table 6 is still omitted whilst we review the definitions used.

Digital reception continues to grow. Digital terrestrial reception in particular 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, and are now reaching 65% of the potential audience in a week. (Table 8)

A new table now shows the 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 2006

Produced in association with OMD UK

July 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>
OLD PANEL					
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			

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 %	ITV1 + GMTV %	CH 4 %	Five %			
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
2006 - Qtr 2	23.5	8.6	19.9	10.4	5.7	68.0	32.0	100.0

TABLE 3

WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

Week Ending:-	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	ITV + GMTV %	CH 4 %	Five %		%	%
09.04.06	22.0	8.9	20.0	9.6	5.9	66.5	33.5	100.0
16.04.06	21.9	8.9	19.3	9.7	5.7	65.5	34.5	100.0
23.04.06	22.9	9.2	19.0	9.7	5.8	66.6	33.4	100.0
30.04.06	22.4	10.4	19.9	9.6	5.9	68.3	31.7	100.0
07.05.06	22.3	9.9	19.2	10.2	5.6	67.2	32.8	100.0
14.05.06	24.6	8.6	19.1	9.4	5.9	67.5	32.5	100.0
21.05.06	22.9	7.8	20.0	11.1	5.8	67.6	32.4	100.0
28.05.06	22.1	8.3	19.7	11.4	5.7	67.3	32.7	100.0
04.06.06	23.3	8.7	18.3	11.3	5.3	66.9	33.1	100.0
11.06.06	24.9	7.9	19.8	11.5	5.7	69.8	30.2	100.0
18.06.06	24.2	7.5	23.3	11.0	5.3	71.3	28.7	100.0
25.06.06	27.2	7.4	20.8	10.2	5.3	70.9	29.1	100.0
02.07.06	25.1	7.8	20.3	11.1	5.4	69.7	30.3	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 2nd JULY 2006

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4	Five			
	%	%	%	%	%	%	%	%
All Individuals	23.5	8.6	20.0	10.4	5.6	68.1	31.9	100.0
All Adults	24.5	8.9	20.6	10.7	5.8	70.5	29.5	100.0
Men	24.5	9.4	19.2	9.6	5.4	68.1	31.9	100.0
Women	24.5	8.6	21.7	11.4	6.1	72.3	27.7	100.0
Housewives	25.3	9.3	21.6	11.2	6.3	73.6	26.4	100.0
HW with children	18.6	4.8	17.9	11.3	5.5	58.1	41.9	100.0
16-34	17.9	5.4	16.0	14.0	5.2	58.4	41.6	100.0
35-54	21.9	6.9	19.6	10.3	5.5	64.3	35.7	100.0
55+	30.5	12.6	24.0	9.0	6.4	82.6	17.4	100.0
ABC1	25.7	9.6	18.3	10.6	4.9	69.1	30.9	100.0
C2DE	23.6	8.5	22.3	10.7	6.4	71.4	28.6	100.0
16-34 ABC1	19.3	6.1	15.4	14.8	4.9	60.5	39.5	100.0
35-54 ABC1	23.4	7.7	18.3	10.2	4.9	64.4	35.6	100.0
55+ ABC1	33.0	14.1	20.4	7.9	4.9	80.4	19.6	100.0
16-34 C2DE	16.7	4.8	16.7	13.2	5.4	56.7	43.3	100.0
35-54 C2DE	20.7	6.4	20.7	10.4	6.0	64.2	35.8	100.0
55+ C2DE	29.0	11.7	26.1	9.7	7.3	83.8	16.2	100.0
CHILDREN	14.6	5.4	13.5	8.5	4.2	46.2	53.8	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 2nd JULY 2006

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4	Five			
	%	%	%	%	%	%	%	%
All Individuals	24.4	9.1	25.2	10.1	6.0	74.7	25.3	100.0
All Adults	24.9	9.5	25.7	10.0	6.1	76.3	23.7	100.0
Men	24.8	9.7	24.5	9.2	5.7	74.0	26.0	100.0
Women	25.0	9.4	26.7	10.7	6.4	78.1	21.9	100.0
Housewives	25.5	10.0	26.7	10.3	6.4	78.9	21.1	100.0
HW with children	20.4	5.3	21.5	13.3	6.4	66.9	33.1	100.0
16-34	19.0	6.1	19.0	16.3	6.1	66.4	33.6	100.0
35-54	22.8	7.7	24.0	10.5	6.1	71.1	28.9	100.0
55+	29.8	12.8	30.7	6.3	6.1	85.7	14.3	100.0
ABC1	26.1	10.6	21.8	10.9	5.4	74.9	25.1	100.0
C2DE	24.0	8.6	28.9	9.3	6.6	77.4	22.6	100.0
16-34 ABC1	19.8	7.1	17.7	17.0	5.7	67.4	32.6	100.0
35-54 ABC1	23.8	8.8	21.4	11.2	5.6	70.8	29.2	100.0
55+ ABC1	32.6	14.8	25.0	6.5	5.0	84.0	16.0	100.0
16-34 C2DE	18.1	5.1	20.3	15.5	6.5	65.5	34.5	100.0
35-54 C2DE	21.8	6.6	26.4	9.8	6.5	71.3	28.7	100.0
55+ C2DE	28.0	11.5	34.4	6.2	6.7	86.9	13.1	100.0
CHILDREN	18.5	4.2	19.2	11.2	4.8	57.9	42.1	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

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
01.04.03	6,372 25.7	2,156 9	1,398 5.6	9,718 39.2	15,101 61.0	1,222 4.9	13,647 55.1	24,772 100
01.07.03	6,470 26.1	2,156 9	1,510 6.1	9,928 40.0	14,930 60.2	1,122 4.5	13,576 54.7	24,811 100
01.10.03	6,600 26.6	2,250 9	1,710 6.9	10,354 41.7	14,544 58.5	1,010 4.1	13,303 53.5	24,857 100
01.01.04	6785 27.6	2326 9.5	2075 8.4	10961 44.5	13688 55.6	951 3.9	12576 51.1	24612 100.0
01.04.04	6830 27.7	2356 9.6	2695 10.9	11579 46.9	13088 53.1	921 3.7	12011 48.7	24667 100.0
01.07.04	6981 28.2	2404 9.7	3084 12.5	12114 49.0	12679 51.3	921 3.7	11602 46.9	24723 100.0
01.10.04	7001 28.3	2555 10.3	3451 13.9	12632 51.0	12241 49.4	813 3.3	11272 45.5	24779 100.0
01.01.05	7146 28.8	2599 10.5	4216 17.0	13526 54.4	11420 46.0	764 3.1	10525 42.4	24852 100.0
01.04.05	7337 29.5	2645 10.6	4674 18.8	14107 56.7	10874 43.7	718 2.9	10031 40.3	24900 100.0
01.07.05	7595 30.4	2609 10.5	4940 19.8	14577 58.4	10446 41.9	679 2.7	9650 38.7	24948 100.0
01.10.05	7751 31.0	2649 10.6	5316 21.3	15149 60.6	9922 39.7	652 2.6	9153 36.6	24996 100.0
01.01.06	7815 31.1	2703 10.7	6363 25.3	16162 64.2	9060 36.0	594 2.4	8349 33.2	25164 100.0
01.04.06	7948 31.5	2748 10.9	6875 27.3	16748 66.4	8516 33.8	549 2.2	7850 31.1	25213 100.0
01.07.06	8082 32.0	2829 11.2	7326 29.0	17295 68.5	7999 31.7	496 2.0	7386 29.2	25263 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	%	%
2004 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
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

* 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 FIN Living Trouble	All Discovery branded channels & Animal	
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
2006 - Qtr 2	34.9	22.9	12.7	5.7	7.0	3.0	2.0	1.4	10.4

* 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>		
2004 - Qtr 2	38.1	2.0	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	8.0
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

* 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