

SUMMARY

This issue of Trends in Television is the third in a new series. All the data contained in the previous reports is 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.

Overall viewing levels continue to rise. The level recorded during this latest quarter is higher than any recorded for many years. (Table 1)

The lower than usual share achieved by ITV is at least in part due to the high audiences to BBC1 and BBC2 during the Olympic Games. Channel Four again had a good quarter. (Table 2)

The impact of the Olympic Games can clearly be seen in the BBC figures for the second half of August. (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

Shares by platform show that all the terrestrial channels hold a larger share of viewing on the digital terrestrial platform (Freeview) than they do on any other digital platform. (Table 6)

The digital terrestrial platform continues to show strong growth. Digital homes continue to grow, now at over 12 million homes. Analogue homes are declining, and are now just below 50% of all homes (Table 7 – now a separate table)

Patronage of all the terrestrial channels except Five is lower than a year ago (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 3 2004

Produced in association with OMD UK

October 2004

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		

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 %		%	%
2002 - Qtr 1	25.3	11.7	25.1	10.1	6.4	78.6	21.4	100.0
2002 - Qtr 2	27.2	10.7	24.2	10.2	6.4	78.7	21.3	100.0
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

TABLE 3

WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

Week Ending:-	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	ITV + GMTV %	CH 4 %	Five %		%	%
04.07.04	28.3	8.2	20.5	11.7	6.2	75.0	25.0	100.0
11.07.04	23.5	9.8	22.4	11.7	6.2	73.6	26.4	100.0
18.07.04	24.0	10.2	21.0	12.4	6.1	73.7	26.3	100.0
25.07.04	22.7	9.9	20.9	13.2	6.2	72.9	27.0	100.0
01.08.04	23.6	8.7	20.0	13.6	6.8	72.7	27.3	100.0
08.08.04	23.2	10.3	19.7	12.3	6.2	71.6	28.4	100.0
15.08.04	26.3	10.8	20.0	8.9	6.4	72.4	27.6	100.0
22.08.04	29.2	11.7	19.7	8.6	5.9	75.0	24.9	100.0
29.08.04	30.6	10.5	19.2	8.1	6.2	74.5	25.6	100.0
05.09.04	25.7	8.8	21.8	9.0	6.3	71.6	28.4	100.0
12.09.04	24.5	9.6	22.9	8.9	6.0	72.0	28.0	100.0
19.09.04	23.8	10.0	22.0	9.1	6.8	71.7	28.3	100.0
26.09.04	23.6	9.0	23.1	9.7	7.2	72.7	27.3	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 26th SEPTEMBER 2004

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4	Five		%	%
	%	%	%	%	%	%		%
All Individuals	25.7	9.7	20.8	10.4	6.3	72.9	27.1	100.0
All Adults	26.8	9.8	21.6	11.1	6.5	75.8	24.2	100.0
Men	26.1	10.6	19.0	10.6	6.3	72.5	27.5	100.0
Women	26.8	9.8	23.8	11.0	6.7	78.0	22.0	100.0
Housewives	27.4	10.3	23.4	10.9	6.9	78.9	21.1	100.0
HW with children	21.2	6.4	20.5	10.9	5.8	64.7	35.3	100.0
16-34	19.8	6.6	17.4	14.0	5.8	63.6	36.4	100.0
35-54	24.3	8.8	20.3	10.1	6.8	70.3	29.7	100.0
55+	32.3	12.7	25.4	9.5	6.9	86.8	13.2	100.0
ABC1	28.5	10.8	18.5	11.5	5.4	74.6	25.4	100.0
C2DE	25.4	9.6	23.7	10.2	7.3	76.3	23.7	100.0
16-34 ABC1	20.2	7.3	15.6	15.6	5.5	64.2	35.8	100.0
35-54 ABC1	26.4	9.6	18.4	11.2	5.6	71.2	28.8	100.0
55+ ABC1	35.6	13.8	21.9	9.4	5.0	85.6	14.4	100.0
16-34 C2DE	18.5	6.7	19.3	13.3	6.7	64.4	35.6	100.0
35-54 C2DE	22.9	8.0	22.3	9.1	6.9	69.1	30.9	100.0
55+ C2DE	30.6	12.0	27.3	9.6	8.1	87.6	12.4	100.0
CHILDREN	16.1	8.6	15.1	7.5	5.4	52.7	47.3	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 26th SEPTEMBER 2004

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	ITV + GMTV %	CH 4 %	Five %		%	%
All Individuals	27.0	9.4	25.9	10.5	6.5	79.3	20.7	100.0
All Adults	27.8	9.6	26.5	10.6	6.5	81.0	19.0	100.0
Men	27.2	10.4	23.8	10.1	6.7	78.2	21.8	100.0
Women	28.2	9.2	28.5	10.9	6.3	83.2	16.8	100.0
Housewives	28.2	9.8	28.2	10.7	6.6	83.6	16.4	100.0
HW with children	23.7	6.7	23.1	13.2	6.5	73.1	26.9	100.0
16-34	21.6	7.3	19.5	16.4	6.6	71.4	28.6	100.0
35-54	26.1	9.0	23.9	10.9	6.8	76.6	23.4	100.0
55+	32.4	11.5	32.0	7.2	6.4	89.3	10.7	100.0
ABC1	29.6	11.0	21.7	11.9	5.5	79.7	20.3	100.0
C2DE	26.2	8.7	30.0	9.5	7.3	81.8	18.2	100.0
16-34 ABC1	23.0	8.5	16.3	17.8	5.6	71.1	28.9	100.0
35-54 ABC1	27.7	10.2	20.5	12.3	6.0	76.8	23.2	100.0
55+ ABC1	36.0	13.5	26.6	7.6	4.8	88.5	11.5	100.0
16-34 C2DE	20.5	6.3	22.5	15.2	7.3	71.9	28.1	100.0
35-54 C2DE	24.3	7.8	27.2	9.6	7.6	76.5	23.5	100.0
55+ C2DE	30.0	10.2	35.3	7.0	7.4	89.8	10.2	100.0
CHILDREN	19.8	6.4	20.9	10.2	5.9	63.1	36.9	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 26th SEPTEMBER 2004

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4	Five			
	%	%	%	%	%	%	%	%
All Platforms	25.5	9.8	21.0	10.6	6.3	73.2	26.8	100.0
Dig-sat	17.9	5.1	14.8	7.2	3.4	48.4	51.6	100.0
Dig-cable	17.7	5.7	15.7	7.2	4.8	51.1	48.9	100.0
Dig-terr	27.6	10.9	21.4	11.7	8.5	80.1	19.9	100.0
Total dig	20.1	6.5	16.5	8.2	4.9	56.2	43.8	100.0
Anlg-cable	14.5	5.7	16.2	6.8	6.0	49.2	50.8	100.0
Anlg terr	34.7	14.4	28.5	14.3	8.1	100.0	0.0	100.0
Total anlg	33.3	13.8	27.3	13.8	8.3	96.5	3.5	100.0

DEFINITION: For the purposes of this table, viewing is allocated according to the home's reception capability rather than the set being used. Thus viewing to any analogue sets in digital homes is classified as "digital" in this table.

TABLE 7

PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
01.04.02	5,583 22.8	2,223 9.1	974 4.0	8,716 <i>35.5</i>	15,865 <i>64.7</i>	1,637 6.7	14,013 57.1	24,528 100
01.07.02	5,730 23.3	2,338 10	997 4.1	8,905 <i>36.2</i>	15,731 <i>64.0</i>	1,310 5.3	14,136 57.5	24,570 100
01.10.02	6,105 24.8	2,292 9	763 3.1	9,015 <i>36.6</i>	15,645 <i>63.6</i>	1,148 4.7	14,265 58.0	24,613 100
01.01.03	6,247 25.3	2,516 10	873 3.5	9,491 <i>38.4</i>	15,283 <i>61.8</i>	924 3.7	14,127 57.1	24,727 100
01.04.03	6,372 25.7	2,156 9	1,398 5.6	9,718 <i>39.2</i>	15,101 <i>61.0</i>	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 <i>40.0</i>	14,930 <i>60.2</i>	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 <i>41.7</i>	14,544 <i>58.5</i>	1,010 4.1	13,303 53.5	24,857 100
01.01.04	6785 27.6	2326 9.5	2075 8.4	10961 <i>44.5</i>	13688 <i>55.6</i>	951 3.9	12576 51.1	24612 100.0
01.04.04	6830 27.7	2356 9.6	2695 10.9	11579 <i>46.9</i>	13088 <i>53.1</i>	921 3.7	12011 48.7	24667 100.0
01.07.04	6981 28.2	2404 9.7	3084 12.5	12114 <i>49.0</i>	12679 <i>51.3</i>	921 3.7	11602 46.9	24723 100.0
01.10.04	7001 28.3	2555 10.3	3451 13.9	12632 <i>51.0</i>	12241 <i>49.4</i>	813 3.3	11272 45.5	24779 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
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<i>Includes:-</i>	<i>BBC1</i>	<i>ITV1</i>	<i>CH 4</i>	<i>Five</i>	<i>All Sky branded channels</i>	<i>All UK branded channels</i>	<i>All other Flextech channels:-</i>	<i>Discovery branded channels & Animal</i>	
	<i>BBC2</i>	<i>ITV2</i>	<i>E4</i>				<i>Bravo</i>		
	<i>BBC3</i>	<i>ITN NEWS</i>	<i>FILM FOUR</i>				<i>Challenge</i>		
	<i>BBC4</i>	<i>GMTV</i>	<i>S4C</i>				<i>Ex. Sports</i>		
	<i>BBC NEWS 24</i>						<i>FTN</i>		
	<i>CBBC/CBEEBIES</i>						<i>Living</i>		
							<i>Trouble</i>		
2003 - Qtr 1	39.1	24.8	9.8	6.3	6.9	2.3	1.3	1.1	8.4
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

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>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 1	43.3	1.6	2.8	16.7	10.8	11.2	6.5	7.1
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

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 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

(Discovery)

Discovery+1
 Dis H&L
 Dis H&L+1
 Dis T&A
 Dis Civil
 Dis Sci
 Dis Wings
 Dis Health
 Animal
 Animal+1

(EMAP)

Box
 Kerrang
 Smash
 Magic
 Kiss
 Q Chan

IDS

Trouble
 Trouble R
 Bravo
 Bravo+1
 Challenge
 Living
 Living+1
 Ex Sports
 FTN
(UKTV)
 UK Gold
 UK Gold+1
 UKG2
 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

