

SUMMARY

Most trend data in this report are confined to the period of the current BARB contract, but as before, some data are 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 are lower than the same quarter a year ago, but high by comparison with historical levels. (Table 1)

The share taken by non-terrestrial channels is now over 30% for the first time. Channel Four has enjoyed its most successful quarter for a long time, whilst ITV, BBC1, BBC2 and five have all lost share this quarter. (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: This table which shows channel shares by platform has been left blank whilst some definition issues have been evaluated.

Digital reception continues to grow. Digital terrestrial reception remains the fastest growing platform and is now serving 20% of the television population. Digital television in all its forms is now in 60% of television households (Table 7)

The non-terrestrial channels continue to extend their patronage. In line with its very high share, Channel Four also has achieved good patronage levels - roughly in line with last year's. The other channels have again shown a decline in their patronage since the same period last year. (Table 8)

Table 9 shows channel shares accumulated by broadcasting company.

Table 10 shows channel impact shares accumulated by the sales houses representing them.



TRENDS IN TELEVISION VIEWING

Quarter 3 2005

Produced in association with OMD UK

November 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	3.42		

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
	<u>BBC1</u> %	<u>BBC2</u> %	<u>ITV1 + GMTV</u> %	<u>CH 4</u> %	<u>Five</u> %	<u>TOTAL</u> %	%	%
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
2005 - Qtr 3	22.2	9.3	20.5	11.0	6.5	69.5	30.5	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 %	%	%
10.07.05	23.7	9.4	21.1	10.0	6.4	70.6	29.4	100.0
17.07.05	22.7	10.0	20.4	10.8	6.9	70.8	29.2	100.0
24.07.05	21.8	9.8	19.9	11.6	7.4	70.6	29.4	100.0
31.07.05	22.7	10.3	19.3	10.0	6.5	68.9	31.1	100.0
07.08.05	21.4	10.2	19.6	12.6	6.4	70.1	29.9	100.0
14.08.05	21.4	9.8	18.4	13.9	6.2	69.8	30.2	100.0
21.08.05	21.8	9.8	20.2	9.9	6.4	68.1	31.9	100.0
28.08.05	21.2	9.7	18.7	13.5	6.6	69.8	30.2	100.0
04.09.05	22.7	8.8	19.8	8.9	6.7	66.9	33.1	100.0
11.09.05	22.8	8.7	20.5	12.2	6.7	70.9	29.1	100.0
18.09.05	22.7	8.2	21.9	10.8	5.9	69.4	30.6	100.0
25.09.05	22.1	7.5	24.0	8.7	6.3	68.5	31.5	100.0
02.10.05	22.2	8.3	22.9	9.5	6.1	69.0	31.0	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 2nd OCTOBER 2005

	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	ITV + GMTV %	CH 4 %	Five %	TOTAL %	%	%
All Individuals	22.4	9.3	20.7	11.0	6.5	69.9	30.1	100.0
All Adults	23.2	9.5	21.3	11.3	6.7	72.1	27.9	100.0
Men	22.0	9.8	19.0	12.2	6.3	69.2	30.8	100.0
Women	24.3	9.3	23.2	10.5	6.9	74.2	25.8	100.0
Housewives	24.3	9.9	22.7	10.9	7.0	74.7	25.3	100.0
HW with children	17.9	5.8	19.3	10.6	6.3	60.0	40.0	100.0
16-34	16.7	6.1	16.9	14.5	5.9	60.1	39.9	100.0
35-54	20.3	7.7	19.9	10.7	6.6	65.2	34.8	100.0
55+	29.4	12.9	25.0	9.8	7.2	84.2	15.8	100.0
ABC1	24.2	10.0	18.2	12.3	5.2	69.9	30.1	100.0
C2DE	22.5	9.2	23.6	10.5	7.7	73.5	26.5	100.0
16-34 ABC1	17.3	6.5	14.8	15.7	5.3	59.6	40.4	100.0
35-54 ABC1	21.8	8.5	18.3	11.6	5.5	65.7	34.3	100.0
55+ ABC1	31.7	13.9	20.6	10.5	4.9	81.7	18.3	100.0
16-34 C2DE	16.2	5.9	18.7	13.4	6.3	60.4	39.6	100.0
35-54 C2DE	19.1	7.1	21.2	10.0	7.5	64.9	35.1	100.0
55+ C2DE	28.0	12.4	27.6	9.4	8.5	85.8	14.2	100.0
CHILDREN	13.8	6.8	14.0	8.6	4.9	48.0	52.0	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 2nd OCTOBER 2005

	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	<u>BBC1</u>	<u>BBC2</u>	<u>ITV + GMTV</u>	<u>CH 4</u>	<u>Five</u>	<u>TOTAL</u>	%	%
	%	%	%	%	%	%		
All Individuals	24.1	8.9	26.0	10.5	6.9	76.4	23.6	100.0
All Adults	24.8	9.3	26.4	10.4	6.9	77.9	22.1	100.0
Men	23.6	9.7	24.0	10.4	7.0	74.7	25.3	100.0
Women	25.7	8.9	28.3	10.4	6.9	80.2	19.8	100.0
Housewives	25.6	9.5	27.7	10.3	7.0	80.2	19.8	100.0
HW with children	20.5	5.7	22.8	12.8	7.1	68.8	31.2	100.0
16-34	18.5	6.4	19.4	16.3	6.8	67.5	32.5	100.0
35-54	22.3	7.7	24.3	10.7	7.3	72.3	27.7	100.0
55+	29.9	12.0	31.6	7.0	6.7	87.1	12.9	100.0
ABC1	26.1	10.4	21.6	11.6	5.7	75.4	24.6	100.0
C2DE	23.7	8.4	30.2	9.5	7.9	79.6	20.4	100.0
16-34 ABC1	19.1	7.2	16.5	17.5	6.1	66.4	33.6	100.0
35-54 ABC1	23.7	9.1	21.4	11.6	6.1	71.9	28.1	100.0
55+ ABC1	33.0	13.9	25.3	7.8	5.0	85.0	15.0	100.0
16-34 C2DE	18.0	5.7	22.2	15.4	7.4	68.7	31.3	100.0
35-54 C2DE	21.1	6.5	26.9	10.0	8.3	72.7	27.3	100.0
55+ C2DE	28.0	10.8	35.7	6.4	7.8	88.6	11.4	100.0
CHILDREN	16.5	4.7	20.4	11.6	5.8	59.1	40.9	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 2nd OCTOBER 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 23.3	2,338 10	997 4.1	8,905 36.2	15,731 64.0	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 36.6	15,645 63.6	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 38.4	15,283 61.8	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 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	7741 31.0	2649 10.6	5316 21.3	15149 60.6	9922 39.7	652 2.6	9153 36.6	24996 100.0

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

TABLE 8

RAGE WEEKLY PATRONAGE* - CONSOLIDATED DATA

ALL INDIVIDUALS

	TERRESTRIAL					NON- TERRESTRIAL	ANY TV AT ALL
	BBC1	BBC2	ITV + GMTV	CH 4	Five	%	%
2003 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
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

* 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 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
2005 - Qtr 3	34.1	23.1	12.7	6.5	6.1	2.9	1.9	1.6	11.1

* 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 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
2005-Qtr 3	33.6	4.2	2.6	19.1	10.9	12.1	8.7	8.8

* 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
 FTV
 Artsworld

(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

(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