

## **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.

Again we see overall viewing in decline. This is the seventh consecutive quarter to show a decline on its equivalent of the previous year. (Table 1)

The major channels continue to suffer from the inexorable growth of the non-terrestrial channels, which have now reached a share of 35%. (Table 2)

Despite a poor start, ITV's share has been much improved in the last four weeks of the quarter. Conversely, Channel 4 did much better in the early part of the quarter. (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)

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 almost 70% 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 audience in a week. (Table 8)

Table 9 shows channel shares accumulated by broadcasting company.

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

# **IPA TRENDS IN TELEVISION VIEWING**

**QTR 3 2006**

Produced in association with OMD UK

November 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>
<b>OLD PANEL</b>					
<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>
<b>NEW PANEL</b>					
<b>2002</b>	<b>3.54</b>	<b>3.47</b>	<b>3.36</b>	<b>3.80</b>	<b>3.54</b>
<b>2003</b>	<b>3.99</b>	<b>3.55</b>	<b>3.41</b>	<b>3.95</b>	<b>3.73</b>
<b>2004</b>	<b>4.00</b>	<b>3.50</b>	<b>3.46</b>	<b>3.89</b>	<b>3.71</b>
<b>2005</b>	<b>3.91</b>	<b>3.45</b>	<b>3.42</b>	<b>3.81</b>	<b>3.65</b>
<b>2006</b>	<b>3.89</b>	<b>3.43</b>	<b>3.31</b>		

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>TV1 + GMT</u>	<u>CH 4</u>	<u>Five</u>	<u>TOTAL</u>		
	%	%	%	%	%	%	%	%
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
2006 - Qtr 3	22.7	8.3	17.9	9.9	5.8	64.6	35.4	100.0

TABLE 3

## WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

Week Ending:-	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	<u>BBC1</u> %	<u>BBC2</u> %	<u>TV + GMTV</u> %	<u>CH 4</u> %	<u>Five</u> %	<u>TOTAL</u> %	%	%
09.07.06	27.9	6.9	16.5	11.5	5.8	68.7	31.3	100.0
16.07.06	21.9	8.1	17.9	11.7	6.5	66.1	33.9	100.0
23.07.06	22.9	9.7	16.4	11.6	6.3	66.8	33.2	100.0
30.07.06	22.2	9.3	16.3	10.6	5.9	64.2	35.8	100.0
06.08.06	22.4	8.0	17.0	10.7	5.6	63.7	36.3	100.0
13.08.06	21.6	8.6	16.7	10.8	5.9	63.6	36.4	100.0
20.08.06	21.7	8.5	16.8	10.5	5.6	63.0	37.0	100.0
27.08.06	22.2	8.3	17.8	8.1	6.0	62.4	37.6	100.0
03.09.06	22.8	8.2	17.5	8.8	5.3	62.5	37.5	100.0
10.09.06	23.1	8.1	19.0	8.3	5.7	64.1	35.9	100.0
17.09.06	22.4	8.2	19.6	8.6	5.8	64.7	35.3	100.0
24.09.06	22.0	8.0	20.7	8.5	5.2	64.4	35.6	100.0
01.10.06	22.4	7.9	20.8	8.8	6.0	65.8	34.2	100.0

TABLE 4

## CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 1st OCTOBER 2006

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	TV + GMTV %	CH 4 %	Five %		%	%
All Individuals	22.8	8.3	17.9	9.9	5.8	64.6	35.4	100.0
All Adults	23.8	8.5	18.6	10.0	6.0	67.0	33.0	100.0
Men	23.2	9.1	16.3	9.3	5.8	63.7	36.3	100.0
Women	24.4	8.1	20.5	10.7	6.1	69.6	30.4	100.0
Housewives	24.8	8.8	19.7	10.4	6.4	70.1	29.9	100.0
HW with childre	17.2	4.7	16.9	10.8	5.5	55.2	44.8	100.0
16-34	16.1	5.4	14.3	13.5	5.3	54.6	45.4	100.0
35-54	20.5	6.9	17.8	9.7	5.8	60.7	39.3	100.0
55+	31.1	11.7	21.8	8.3	6.5	79.4	20.6	100.0
ABC1	25.0	9.2	15.8	10.2	4.9	65.1	34.9	100.0
C2DE	23.0	8.1	20.6	9.9	6.8	68.3	31.7	100.0
16-34 ABC1	17.2	5.9	13.3	14.4	4.7	55.5	44.5	100.0
35-54 ABC1	21.9	7.6	16.3	9.8	5.1	60.7	39.3	100.0
55+ ABC1	33.9	13.2	17.2	7.6	4.8	76.7	23.3	100.0
16-34 C2DE	15.0	4.8	15.3	12.6	5.9	53.7	46.3	100.0
35-54 C2DE	19.4	6.3	19.0	9.7	6.4	60.7	39.3	100.0
55+ C2DE	29.4	10.9	24.4	8.7	7.5	80.9	19.1	100.0
CHILDREN	12.7	6.0	11.8	8.3	4.0	42.8	57.2	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	TV + GMTV	CH 4	Five		%	%
	%	%	%	%	%	%	%	%
All Individuals	24.5	8.6	22.7	10.1	6.1	72.0	28.0	100.0
All Adults	25.2	9.0	23.1	10.0	6.2	73.5	26.5	100.0
Men	24.3	9.5	20.8	9.4	6.2	70.2	29.8	100.0
Women	25.9	8.6	25.0	10.5	6.2	76.3	23.7	100.0
Housewives	26.0	9.3	24.3	10.2	6.5	76.4	23.6	100.0
HW with childre	19.3	5.0	20.8	13.2	6.3	64.7	35.3	100.0
16-34	17.8	6.0	17.2	16.1	6.2	63.2	36.8	100.0
35-54	21.9	7.4	21.7	10.6	6.3	67.9	32.1	100.0
55+	31.7	11.8	27.3	6.3	6.2	83.4	16.6	100.0
ABC1	26.4	10.2	18.9	10.9	5.4	71.8	28.2	100.0
C2DE	24.3	8.1	26.4	9.3	6.9	74.9	25.1	100.0
16-34 ABC1	18.6	6.8	15.3	16.8	5.6	63.1	36.9	100.0
35-54 ABC1	23.0	8.6	19.1	11.2	5.7	67.5	32.5	100.0
55+ ABC1	34.7	13.9	21.2	6.7	5.0	81.5	18.5	100.0
16-34 C2DE	16.9	5.1	19.0	15.4	6.7	63.2	36.8	100.0
35-54 C2DE	20.9	6.3	24.1	10.0	6.9	68.2	31.8	100.0
55+ C2DE	29.7	10.5	31.2	6.1	7.0	84.6	15.4	100.0
CHILDREN	16.8	4.2	18.1	11.3	4.8	55.3	44.7	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
01.07.03	6,470	2,156	1,510	<b>9,928</b>	<b>14,930</b>	1,122	13,576	24,811
	<i>26.1</i>	<i>9</i>	<i>6.1</i>	<i>40.0</i>	<i>60.2</i>	<i>4.5</i>	<i>54.7</i>	<i>100</i>
01.10.03	6,600	2,250	1,710	<b>10,354</b>	<b>14,544</b>	1,010	13,303	24,857
	<i>26.6</i>	<i>9</i>	<i>6.9</i>	<i>41.7</i>	<i>58.5</i>	<i>4.1</i>	<i>53.5</i>	<i>100</i>
01.01.04	6785	2326	2075	<b>10961</b>	<b>13688</b>	951	12576	24612
	<i>27.6</i>	<i>9.5</i>	<i>8.4</i>	<i>44.5</i>	<i>55.6</i>	<i>3.9</i>	<i>51.1</i>	<i>100.0</i>
01.04.04	6830	2356	2695	<b>11579</b>	<b>13088</b>	921	12011	24667
	<i>27.7</i>	<i>9.6</i>	<i>10.9</i>	<i>46.9</i>	<i>53.1</i>	<i>3.7</i>	<i>48.7</i>	<i>100.0</i>
01.07.04	6981	2404	3084	<b>12114</b>	<b>12679</b>	921	11602	24723
	<i>28.2</i>	<i>9.7</i>	<i>12.5</i>	<i>49.0</i>	<i>51.3</i>	<i>3.7</i>	<i>46.9</i>	<i>100.0</i>
01.10.04	7001	2555	3451	<b>12632</b>	<b>12241</b>	813	11272	24779
	<i>28.3</i>	<i>10.3</i>	<i>13.9</i>	<i>51.0</i>	<i>49.4</i>	<i>3.3</i>	<i>45.5</i>	<i>100.0</i>
01.01.05	7146	2599	4216	<b>13526</b>	<b>11420</b>	764	10525	24852
	<i>28.8</i>	<i>10.5</i>	<i>17.0</i>	<i>54.4</i>	<i>46.0</i>	<i>3.1</i>	<i>42.4</i>	<i>100.0</i>
01.04.05	7337	2645	4674	<b>14107</b>	<b>10874</b>	718	10031	24900
	<i>29.5</i>	<i>10.6</i>	<i>18.8</i>	<i>56.7</i>	<i>43.7</i>	<i>2.9</i>	<i>40.3</i>	<i>100.0</i>
01.07.05	7595	2609	4940	<b>14577</b>	<b>10446</b>	679	9650	24948
	<i>30.4</i>	<i>10.5</i>	<i>19.8</i>	<i>58.4</i>	<i>41.9</i>	<i>2.7</i>	<i>38.7</i>	<i>100.0</i>
01.10.05	7751	2649	5316	<b>15149</b>	<b>9922</b>	652	9153	24996
	<i>31.0</i>	<i>10.6</i>	<i>21.3</i>	<i>60.6</i>	<i>39.7</i>	<i>2.6</i>	<i>36.6</i>	<i>100.0</i>
01.01.06	7815	2703	6363	<b>16162</b>	<b>9060</b>	594	8349	25164
	<i>31.1</i>	<i>10.7</i>	<i>25.3</i>	<i>64.2</i>	<i>36.0</i>	<i>2.4</i>	<i>33.2</i>	<i>100.0</i>
01.04.06	7948	2748	6875	<b>16748</b>	<b>8516</b>	549	7850	25213
	<i>31.5</i>	<i>10.9</i>	<i>27.3</i>	<i>66.4</i>	<i>33.8</i>	<i>2.2</i>	<i>31.1</i>	<i>100.0</i>
01.07.06	8082	2829	7326	<b>17295</b>	<b>7999</b>	496	7386	25263
	<i>32.0</i>	<i>11.2</i>	<i>29.0</i>	<i>68.5</i>	<i>31.7</i>	<i>2.0</i>	<i>29.2</i>	<i>100.0</i>
01.10.06	8218	2880	7646	<b>17604</b>	<b>7737</b>	445	7175	25312
	<i>32.5</i>	<i>11.4</i>	<i>30.2</i>	<i>69.5</i>	<i>30.6</i>	<i>1.8</i>	<i>28.3</i>	<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

	TERRESTRIAL					NON-TERRESTRIAL	ANY TV AT ALL
	<u>BBC1</u>	<u>BBC2</u>	<u>TV + GMTV</u>	<u>CH 4</u>	<u>Five</u>		
	%	%	%	%	%	%	%
2004 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
July	80.6	63.0	72.7	67.2	48.4	64.1	91.5
August	80.3	63.5	73.5	66.5	49.2	65.1	90.7
September	81.9	65.2	76.8	67.1	51.6	66.6	92.4

\* 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>	<i>BBC1 BBC2 BBC3 BBC4 BBC NEWS 24 CBBC/CBEEBIE</i>	<i>ITV1 ITV2 ITV3* ITV4** ITN NEWS GMTV Men &amp; M</i>	<i>CH 4 E4 FILM FOUR S4C More4***</i>	<i>Five</i>	<i>All Sky branded channels</i>	<i>All UK branded channels</i>	<i>All other Flextech channels:- Bravo Challenge Ex: Sports FTN Living Tronble</i>	<i>All Discovery branded channels &amp; Animal</i>	
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
2006 - Qtr 3	34.0	21.5	12.8	5.8	7.6	3.3	2.2	1.5	11.3

TABLE 10

\* From Nov 2004      \*\* From Nov 2005      \*\*\* from Oct 2005

**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 &amp; 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 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
2006 - Qtr 3	29.2	6.7	3.0	19.9	9.7	12.9	10.1	8.6

\* 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  
 y 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) (EMAP)*

Discovery+1 Box  
 Dis H&L Kerrang  
 Dis H&L+1 Smash  
 Dis T&A Magic  
 Dis Civil Kiss  
 Dis Sci Q Chan  
 Dis Wings Hits  
 Dis Health  
 Animal  
 Animal+1  
 Dis Real TM  
 Dis Real +1  
 Dis Kids  
 Dis Real Ex

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