

## **SUMMARY**

Once again, overall viewing levels have shown growth compared to the same quarter of the previous year. (Table 1)

With the exception of ITV, all terrestrial channels have lost a little share this quarter as the non-terrestrial channels continue their growth now almost taking 40% of viewing. (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)

Digital reception has now reached 78% of all homes. Digital terrestrial remains the fastest growing platform – now in over 40% of television homes. (Table 6)

The non-terrestrial channels patronage is also growing now reaching an all time high of 70% of all individuals in a week. (Table 7)

This table shows channel shares accumulated by broadcasting groups/companies. (Table 8)

Table 9 shows channel impact shares accumulated by the sales houses representing them – ITV dominates this with a 30.8% share of commercial impacts.

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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 long term context. Care should be taken in comparing data from the two different panels.



# **TRENDS IN TELEVISION VIEWING REPORT**

**Quarter 3 2007**

**Published: November 2007**

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>
<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>	<b>3.76</b>	<b>3.60</b>
<b>2007</b>	<b>3.85</b>	<b>3.46</b>	<b>3.38</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	% OF VIEWING TO ADVERTISING CHANNELS
	<u>BBC1</u> %	<u>BBC2</u> %	<u>ITV1 + GMTV</u> %	<u>CH 4</u> %	<u>Five</u> %	<u>TOTAL</u> %	%	%	
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	61.4
2006 - Qtr 2	23.5	8.6	19.9	10.4	5.7	68.0	32.0	100.0	61.5
2006 - Qtr 3	22.7	8.3	17.9	9.9	5.8	64.6	35.4	100.0	61.9
2006 - Qtr 4	22.5	8.8	19.9	8.8	5.5	65.5	34.5	100.0	61.7
2007 - Qtr 1	22.2	8.7	19.5	9.5	5.4	65.4	34.6	100.0	61.8
2007 - Qtr 2	22.2	8.6	18.8	8.8	5.3	63.6	36.4	100.0	61.6
2007 - Qtr 3	21.3	8.2	18.8	8.5	5.1	61.9	37.9	100.0	61.8

TABLE 3

## WEEKLY CHANNEL SHARES - THIS QUARTER

## ALL INDIVIDUALS

Week Ending:-	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	<u>BBC1</u> %	<u>BBC2</u> %	<u>ITV + GMTV</u> %	<u>CH 4</u> %	<u>Five</u> %	<u>TOTAL</u> %	%	%
08.07.07	22.0	8.1	19.0	9.6	5.2	63.9	36.1	100.0
15.07.07	20.5	7.9	18.3	10.0	5.7	62.4	37.6	100.0
22.07.07	21.0	9.0	18.9	8.3	5.2	62.5	37.5	100.0
29.07.07	20.4	8.8	18.1	8.8	4.8	61.0	39.0	100.0
05.08.07	20.3	7.8	19.8	8.8	4.9	61.6	38.4	100.0
12.08.07	20.9	8.3	17.8	8.6	5.4	61.1	38.9	100.0
19.08.07	20.5	8.5	18.0	8.4	5.3	60.7	39.3	100.0
26.08.07	21.2	8.3	18.2	8.6	5.2	61.9	38.1	100.0
02.09.07	19.9	8.4	17.7	9.2	4.8	60.6	39.4	100.0
09.09.07	23.2	8.0	18.5	7.7	5.0	62.8	37.2	100.0
16.09.07	22.6	7.9	19.2	7.8	4.6	62.6	37.4	100.0
23.09.07	22.0	8.0	19.7	7.3	5.2	62.5	37.5	100.0
30.09.07	22.5	7.8	21.0	7.2	4.9	63.8	36.2	100.0

TABLE 4

## CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 30th SEPTEMBER 2007

	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	21.3	8.2	18.8	8.7	5.1	62.1	37.9	100.0
All Adults	22.3	8.5	19.6	8.8	5.3	64.4	35.6	100.0
Men	21.6	9.1	17.4	8.3	5.2	61.5	38.5	100.0
Women	22.9	8.0	21.3	9.1	5.3	66.6	33.4	100.0
Housewives	23.5	8.8	20.9	9.0	5.6	67.9	32.1	100.0
HW with children	16.6	5.2	16.8	9.8	4.6	53.0	47.0	100.0
16-34	14.8	5.6	13.7	11.5	4.5	50.1	49.9	100.0
35-54	19.9	7.2	18.2	8.9	5.0	59.2	40.8	100.0
55+	28.3	11.0	23.8	7.2	5.9	76.1	23.9	100.0
ABC1	23.7	9.3	17.2	8.8	4.1	63.2	36.8	100.0
C2DE	21.3	7.8	21.3	8.8	6.1	65.3	34.7	100.0
16-34 ABC1	16.7	6.6	13.1	11.9	3.9	52.2	47.8	100.0
35-54 ABC1	21.1	7.9	17.2	8.8	4.2	59.2	40.8	100.0
55+ ABC1	31.0	12.4	19.8	6.7	4.2	74.1	25.9	100.0
16-34 C2DE	13.2	4.8	14.3	11.1	4.9	48.2	51.8	100.0
35-54 C2DE	19.0	6.6	18.9	9.0	5.7	59.2	40.8	100.0
55+ C2DE	26.7	10.1	26.1	7.6	6.8	77.3	22.7	100.0
CHILDREN	11.9	6.0	11.6	7.9	3.5	40.9	59.1	100.0

TABLE 5

**CHANNEL SHARES BY DEMOGRAPHICS - PEAK TIME (1800-2259)****ALL INDIVIDUALS - 13 W/E 30th SEPTEMBER 2007**

	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	22.5	8.5	23.1	9.5	5.4	69.0	31.0	100.0
All Adults	23.1	8.8	23.5	9.3	5.6	70.4	29.6	100.0
Men	22.2	9.4	21.2	8.8	5.7	67.4	32.6	100.0
Women	23.9	8.4	25.3	9.7	5.5	72.8	27.2	100.0
Housewives	24.1	9.1	24.9	9.5	5.7	73.4	26.6	100.0
HW with children	18.5	5.5	19.9	13.1	4.9	61.9	38.1	100.0
16-34	16.0	6.3	16.0	14.5	5.2	58.1	41.9	100.0
35-54	20.5	7.7	21.3	10.3	5.6	65.4	34.6	100.0
55+	28.6	11.0	28.9	6.0	5.7	80.2	19.8	100.0
ABC1	24.6	10.3	20.1	9.6	4.6	69.1	30.9	100.0
C2DE	22.0	7.7	26.2	9.1	6.3	71.4	28.6	100.0
16-34 ABC1	17.7	7.8	14.8	14.3	4.6	59.1	40.9	100.0
35-54 ABC1	21.5	8.9	19.6	10.3	4.8	65.1	34.9	100.0
55+ ABC1	31.6	13.1	23.8	6.1	4.5	79.1	20.9	100.0
16-34 C2DE	14.4	4.9	17.2	14.7	5.7	57.0	43.0	100.0
35-54 C2DE	19.6	6.6	22.8	10.3	6.4	65.7	34.3	100.0
55+ C2DE	26.7	9.6	32.2	5.9	6.5	81.0	19.0	100.0
CHILDREN	14.9	4.6	17.8	11.9	4.0	53.1	46.9	100.0

TABLE 6

## PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
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>	<b>49.0</b>	<b>51.3</b>	<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>	<b>51.0</b>	<b>49.4</b>	<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>	<b>54.4</b>	<b>46.0</b>	<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>	<b>56.7</b>	<b>43.7</b>	<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>	<b>58.4</b>	<b>41.9</b>	<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>	<b>60.6</b>	<b>39.7</b>	<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>	<b>64.2</b>	<b>36.0</b>	<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>	<b>66.4</b>	<b>33.8</b>	<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>	<b>68.5</b>	<b>31.7</b>	<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>	<b>69.5</b>	<b>30.6</b>	<i>1.8</i>	<i>28.3</i>	<i>100.0</i>
01.01.07	8320	2933	8831	<b>18226</b>	<b>7167</b>	368	6682	25319
	<i>32.9</i>	<i>11.6</i>	<i>34.9</i>	<b>72.0</b>	<b>28.3</b>	<i>1.5</i>	<i>26.4</i>	<i>100.0</i>
01.04.07	8335	3074	9233	<b>18642</b>	<b>6788</b>	288	6383	25380
	<i>32.8</i>	<i>12.1</i>	<i>36.4</i>	<b>73.5</b>	<b>26.7</b>	<i>1.1</i>	<i>25.1</i>	<i>100.0</i>
01.07.07	8382	3134	9811	<b>19213</b>	<b>6285</b>	228	5949	25442
	<i>32.9</i>	<i>12.3</i>	<i>38.6</i>	<b>75.5</b>	<b>24.7</b>	<i>0.9</i>	<i>23.4</i>	<i>100.0</i>
01.10.07	8493	3225	10545	<b>19877</b>	<b>5663</b>	173	5382	25503
	<i>33.3</i>	<i>12.6</i>	<i>41.3</i>	<b>77.9</b>	<b>22.2</b>	<i>0.7</i>	<i>21.1</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 7

**AVERAGE WEEKLY PATRONAGE\* - CONSOLIDATED DATA**  
**ALL INDIVIDUALS**

	TERRESTRIAL					NON- TERRESTRIAL	ANY TV AT ALL
	<u>BBC1</u>	<u>BBC2</u>	<u>ITV + GMTV</u>	<u>CH 4</u>	<u>Five</u>		
	%	%	%	%	%	%	%
2005 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
October	83.4	66.5	78.2	69.4	51.6	67.6	93.3
November	84.7	69.9	79.5	70.9	51.9	69.2	94.1
December	85.0	68.3	78.5	70.9	53.3	68.8	93.2
2007 January	85.2	69.2	78.8	74.7	52.6	70.2	94.3
February	85.2	71.5	79.2	72.9	53.7	70.8	94.6
March	84.4	68.8	78.4	70.3	51.4	70.8	94.3
April	83.2	65.4	76.3	67.7	48.0	70.1	93.5
May	84.3	65.6	76.6	69.9	49.0	70.7	94.1
June	83.4	64.9	76.0	68.1	48.0	70.7	93.5
July	80.2	63.9	74.0	65.8	46.5	69.7	91.7
August	79.3	62.9	73.2	63.3	45.1	69.3	90.7
September	82.0	64.6	76.5	65.3	47.8	72.0	92.9

\* Patronage is defined as the percentage of the population tuning to a channel for at least three minutes during the week

TABLE 8

## TRENDS IN AUDIENCE SHARE BY BROADCASTER

	<u>BBC</u> %	<u>Non-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/CBEEBIES</i>		<i>ITV1 ITV2 ITV3 ITV4** ITN NEWS GMTV Men &amp; M</i>	<i>CH 4 E4 FILM FOUR S4C More4*** CH4+1</i>	<i>Five Five Life(+1) Five US(+1)</i>	<i>All Sky branded channels</i>	<i>All UK branded channels</i>	<i>All other Flextech channels:- Bravo Challenge Ex. Sports FTN Living Trouble</i>	<i>All Discovery branded channels &amp; Animal</i>	
2005 - Qtr 3	34.1	65.9	23.1	12.7	6.5	6.1	2.9	1.9	1.6	11.1
2005 - Qtr 4	35.3	64.7	25.1	10.1	6.2	6.2	2.7	2.0	1.7	10.7
2006 - Qtr 1	34.7	65.3	23.8	12	5.9	6.7	3.1	1.8	1.5	10.5
2006 - Qtr 2	34.9	65.1	22.9	12.7	5.7	7.0	3.0	2.0	1.4	10.4
2006 - Qtr 3	34.0	66.0	21.5	12.8	5.8	7.6	3.3	2.2	1.5	11.3
2006 - Qtr 4	34.3	65.8	23.7	11.0	6.1	7.1	3.2	2.1	1.2	11.4
2007 - Qtr 1	34.0	66.0	23.1	12.3	6.1	6.6	3.1	2.2	1.2	11.4
2007 - Qtr 2	34.2	65.8	22.7	11.9	6.1	6.3	3.2	2.3	1.2	12.1
2007 - Qtr 3	33.4	66.6	23.1	11.9	6.0	6.1	3.2	2.3	1.3	12.8

\*\* From Nov 2005

\*\*\* from Oct 2005

**TABLE 9**

**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>		
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
2006 - Qtr 4	32.5	6.8	2.2	16.8	10.2	13.6	9.8	8.1
2007 - Qtr 1	31.6	6.2	2.3	19.3	10.2	12.9	9.8	7.7
2007 - Qtr 2	30.0	6.7	2.4	19.2	10.4	12.9	10.0	8.5
2007 - Qtr 3	30.8	7.6	2.3	19.5	10.6	9.7	10.5	9.0

*\*\* 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  
 All Sky Movies  
 Sky Cinema 1 - 2  
 Sky News  
 Sky Travel  
 Sky Travel +1  
 Sky Travel S  
 Sky Travel 2  
 Sky Movies Active 1 - 8  
 Diva  
 Zona Romantica

**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  
 Diva  
 Zona Romantica

***(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  
***(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  
 All Setanta  
 Virgin 1(+1)