



TRENDS IN TELEVISION VIEWING

QTR 3 2008

October 2008

SUMMARY

Average hours of television viewing for the third quarter of 2008 were 3.54 hours – the highest level recorded since the start of the current BARB panel. The non-terrestrial channels continued to grow and are now approaching a 40% share 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 continues to grow across each platform and now stands at 83.2% overall - the individual growth for each digital platform indicates that more homes are installing multiple platforms
(Table 6)**

Patronage levels for BBC2 and for five are higher than a year ago, whilst BBC1 and ITV show a decline over the year. Patronage of the non-terrestrial channels has now established itself at over 75%. (Table 7)

Table 8 shows audience shares accumulated by broadcasting company. The BBC services have the highest share at 34.1%, followed by the ITV services with a 21.9% share.

Table 9 shows channel impact shares accumulated by the sales houses representing them.

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.

TABLE 1

AVERAGE DAILY HOURS OF VIEWING - ALL TV

ALL INDIVIDUALS

	Qtr 1	Qtr 2	Qtr 3	Qtr 4	FULL YEAR
<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					
<i>2002</i>	<i>3.54</i>	<i>3.47</i>	<i>3.36</i>	<i>3.80</i>	<i>3.54</i>
<i>2003</i>	<i>3.99</i>	<i>3.55</i>	<i>3.41</i>	<i>3.95</i>	<i>3.73</i>
<i>2004</i>	<i>4.00</i>	<i>3.50</i>	<i>3.46</i>	<i>3.89</i>	<i>3.71</i>
<i>2005</i>	<i>3.91</i>	<i>3.45</i>	<i>3.42</i>	<i>3.81</i>	<i>3.65</i>
<i>2006</i>	<i>3.89</i>	<i>3.43</i>	<i>3.31</i>	<i>3.76</i>	<i>3.60</i>
<i>2007</i>	<i>3.85</i>	<i>3.46</i>	<i>3.38</i>	<i>3.83</i>	<i>3.63</i>
<i>2008</i>	<i>3.97</i>	<i>3.57</i>	<i>3.54</i>		

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
	BBC1	BBC2	ITV1 + GMTV	CH 4	CH 4 + 1	Five	TOTAL			
	%	%	%	%	%	%	%	%	%	
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	61.4
2006 - Qtr 3	22.7	8.3	17.9	9.9		5.8	64.6	35.4	100.0	61.5
2006 - Qtr 4	22.5	8.8	19.9	8.8		5.5	65.5	34.5	100.0	61.9
2007 - Qtr 1	22.2	8.7	19.5	9.5		5.4	65.4	34.6	100.0	61.7
2007 - Qtr 2	22.2	8.6	18.8	8.8		5.3	63.6	36.4	100.0	61.8
2007 - Qtr 3	21.3	8.2	18.8	8.5		5.1	62.1	37.9	100.0	61.6
2007 - Qtr 4	22.4	8.6	19.7	7.6	0.5	4.8	63.5	36.5	100.0	61.8
2008 - Qtr 1	21.6	7.8	18.9	7.8	0.6	5.3	61.9	38.1	100.0	61.4
2008 - Qtr 2	21.7	7.8	18.8	7.8	0.7	5.0	61.8	38.2	100.0	62.0
2008 - Qtr 3	22.3	7.8	17.2	7.4	0.7	4.8	60.2	39.8	100.0	61.1

TABLE 3

WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

	TERRESTRIAL							NON- TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4	CH4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%	%
Week Ending:-									
06.07.08	26.3	7.9	17.1	7.8	0.7	4.5	64.2	35.8	100.0
13.07.08	20.8	8.5	16.9	8.3	0.7	4.8	60.1	39.9	100.0
20.07.08	20.6	8.6	17.8	7.8	0.7	4.7	60.2	39.8	100.0
27.07.08	20.3	7.4	17.2	8.0	0.9	4.5	58.3	41.7	100.0
03.08.08	19.6	8.0	17.7	7.1	0.7	4.7	58.0	42.0	100.0
10.08.08	22.4	8.0	16.0	6.9	0.8	4.6	58.6	41.4	100.0
17.08.08	27.6	7.5	15.8	6.5	0.7	4.5	62.6	37.4	100.0
24.08.08	28.1	7.2	16.2	6.3	0.7	4.7	63.2	36.8	100.0
31.08.08	19.6	7.9	16.4	7.7	0.8	5.0	57.5	42.5	100.0
07.09.08	20.1	7.6	18.0	8.0	0.7	4.6	59.2	40.8	100.0
14.09.08	20.8	7.8	18.3	7.5	0.8	4.9	60.1	39.9	100.0
21.09.08	21.1	7.9	17.4	7.1	0.8	5.5	59.8	40.2	100.0
28.09.08	21.3	7.1	19.5	7.1	0.7	5.3	61.0	39.0	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 28th SEPTEMBER 2008

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%
All Individuals	22.3	7.8	17.2	8.1	4.8	60.3	39.7	100.0
All Adults	23.5	8.1	18.0	8.2	5.0	62.8	37.2	100.0
Men	23.5	8.7	15.7	7.5	4.7	60.1	39.9	100.0
Women	23.5	7.6	19.9	8.8	5.2	64.9	35.1	100.0
Housewives	24.5	8.4	19.3	8.5	5.3	66.0	34.0	100.0
HW with children	16.8	5.3	14.8	9.8	4.6	51.3	48.7	100.0
16-34	14.8	5.8	11.4	10.9	4.1	46.9	53.1	100.0
35-54	21.0	7.4	16.2	8.7	4.9	58.3	41.7	100.0
55+	30.0	9.8	22.9	6.4	5.5	74.7	25.3	100.0
ABC1	25.3	8.9	15.1	8.2	4.1	61.5	38.5	100.0
C2DE	22.2	7.5	20.2	8.3	5.6	63.7	36.3	100.0
16-34 ABC1	16.8	6.7	10.2	10.9	3.9	48.5	51.5	100.0
35-54 ABC1	22.2	8.1	14.6	8.6	4.0	57.5	42.5	100.0
55+ ABC1	33.5	11.0	18.8	6.0	4.2	73.6	26.4	100.0
16-34 C2DE	13.0	4.9	12.4	11.0	4.3	45.5	54.5	100.0
35-54 C2DE	20.0	6.8	17.7	8.8	5.6	58.9	41.1	100.0
55+ C2DE	27.9	9.1	25.5	6.7	6.3	75.4	24.6	100.0
CHILDREN	11.0	5.1	9.9	7.0	3.2	36.4	63.6	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 28th SEPTEMBER 2008

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%
All Individuals	23.0	8.7	21.1	9.5	4.9	67.1	32.9	100.0
All Adults	23.7	9.0	21.6	9.3	5.0	68.6	31.4	100.0
Men	23.1	9.6	19.4	8.5	5.1	65.7	34.3	100.0
Women	24.2	8.5	23.4	9.9	4.9	70.9	29.1	100.0
Housewives	24.6	9.2	22.9	9.5	5.1	71.3	28.7	100.0
HW with children	18.4	6.4	17.6	13.7	4.4	60.5	39.5	100.0
16-34	15.8	7.2	13.4	14.4	4.1	54.8	45.2	100.0
35-54	21.0	8.5	18.8	10.7	5.0	64.0	36.0	100.0
55+	29.7	10.2	27.7	5.8	5.4	78.8	21.2	100.0
ABC1	25.7	10.5	17.7	9.4	4.1	67.4	32.6	100.0
C2DE	22.1	7.8	24.8	9.3	5.7	69.6	30.4	100.0
16-34 ABC1	17.6	8.7	11.5	13.8	3.9	55.5	44.5	100.0
35-54 ABC1	22.6	9.8	16.3	10.4	4.2	63.3	36.7	100.0
55+ ABC1	33.4	12.1	22.5	5.9	4.2	78.2	21.8	100.0
16-34 C2DE	13.9	5.8	15.1	15.0	4.3	54.1	45.9	100.0
35-54 C2DE	19.5	7.3	21.1	10.9	5.8	64.7	35.3	100.0
55+ C2DE	27.2	9.0	31.2	5.8	6.1	79.3	20.7	100.0
CHILDREN	14.0	4.9	15.3	11.2	3.7	49.0	51.0	100.0

TABLE 6

PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
01.07.05	7595	2609	4940	14577	10446	679	9650	24948
	30.4	10.5	19.8	58.4	41.9	2.7	38.7	100.0
01.10.05	7751	2649	5316	15149	9922	652	9153	24996
	31.0	10.6	21.3	60.6	39.7	2.6	36.6	100.0
01.01.06	7815	2703	6363	16162	9060	594	8349	25164
	31.1	10.7	25.3	64.2	36.0	2.4	33.2	100.0
01.04.06	7948	2748	6875	16748	8516	549	7850	25213
	31.5	10.9	27.3	66.4	33.8	2.2	31.1	100.0
01.07.06	8082	2829	7326	17295	7999	496	7386	25263
	32.0	11.2	29.0	68.5	31.7	2.0	29.2	100.0
01.10.06	8218	2880	7646	17604	7737	445	7175	25312
	32.5	11.4	30.2	69.5	30.6	1.8	28.3	100.0
01.01.07	8320	2933	8831	18226	7167	368	6682	25319
	32.9	11.6	34.9	72.0	28.3	1.5	26.4	100.0
01.04.07	8335	3074	9233	18642	6788	288	6383	25380
	32.8	12.1	36.4	73.5	26.7	1.1	25.1	100.0
01.07.07	8382	3134	9811	19213	6285	228	5949	25442
	32.9	12.3	38.6	75.5	24.7	0.9	23.4	100.0
01.10.07	8493	3225	10545	19877	5663	173	5382	25503
	33.3	12.6	41.3	77.9	22.2	0.7	21.1	100.0
01.01.08	8752	3274	12017	21104	4596	131	4357	25633
	34.1	12.8	46.9	82.3	17.9	0.5	17.0	100.0
01.04.08	8808	3277	12239	21316	4394	148	4138	25696
	34.3	12.8	47.6	83.0	17.1	0.6	16.1	100.0
01.07.08	8876	3336	12465	21506	4305	151	4046	25760
	34.5	13.0	48.4	83.5	16.7	0.6	15.7	100.0
01.10.08	9084	3379	12989	21618	4273	144	4021	25823
	35.2	13.1	50.3	83.7	16.5	0.6	15.6	100.0

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
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five		
	%	%	%	%	%	%	%
2006 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
October	83.2	67.9	79.7	66.3	50.6	72.7	93.2
November	85.2	70.7	79.3	69.8	50.4	75.0	94.3
December	85.1	70.4	79.2	70.7	51.2	76.2	93.8
2008 January	85.2	69.2	78.9	72.0	50.8	77.3	94.1
February	83.6	67.4	77.7	70.0	53.5	77.7	94.1
March	83.9	67.4	78.6	69.7	56.1	78.3	94.1
April	84.1	65.5	77.9	67.9	53.1	77.5	94.1
May	83.2	63.8	76.8	66.2	49.7	77.1	93.6
June	82.3	65.6	74.3	65.9	48.8	76.4	93.0
July	79.3	64.4	70.8	61.5	48.1	75.1	91.5
August	80.6	66.8	72.2	61.6	49.3	75.2	90.9
September	81.2	64.8	75.5	64.7	49.5	76.5	92.4

* 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

	BBC	Non-BBC	ITV	CH 4	Five	Sky	UKTV	Other Flextech	Discovery Channels	Other
	%	%	%	%	%	%	%	%	%	%
<i>Includes:-</i>	<i>BBC1</i>		<i>ITV1</i>	<i>CH 4</i>	<i>Five</i>	<i>All Sky branded</i>	<i>All UK branded</i>	<i>All other Flextech</i>	<i>All Discovery branded</i>	
	<i>BBC2</i>		<i>ITV2</i>	<i>E4</i>	<i>Five Life(+1)</i>	<i>channels</i>	<i>channels</i>	<i>channels:-</i>	<i>channels & Animal</i>	
	<i>BBC3</i>		<i>ITV3</i>	<i>FILM FOUR</i>	<i>Five US(+1)</i>			<i>Bravo</i>		
	<i>BBC4</i>		<i>ITV4**</i>	<i>S4C</i>				<i>Challenge</i>		
	<i>BBC NEWS 24</i>		<i>ITN NEWS</i>	<i>More4***</i>				<i>Ex. Sports</i>		
	<i>CBBC/CBEEBIES</i>		<i>GMTV</i>	<i>CH4+1</i>				<i>FTN</i>		
			<i>Men & M</i>					<i>Living</i>		
								<i>Trouble</i>		
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
2007 - Qtr 4	34.5	65.5	23.9	10.8	5.8	6.4	3.5	2.3	1.1	11.7
2008 - Qtr 1	33.3	66.7	23.4	11.7	6.3	6.1	3.5	2.2	1.2	12.3
2008 - Qtr 2	33.5	66.5	23.6	11.7	6.1	5.7	3.3	2.2	1.2	12.7
2008 - Qtr 3	34.1	65.9	21.9	11.8	5.9	6.0	3.5	2.6	1.2	13.0

** From Nov 2005

*** from Oct 2005

TABLE 9

TRENDS IN IMPACTS SHARE BY SALES HOUSE

	ITV1	Other ITV	GMTV	CH 4	Five	BSkyB	IDS	All others
	%	%	%	%	%	%	%	%
<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>CH4+1</i>	<i>Five</i>	----- <i>See Appendix</i> -----		
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
2007 - Qtr 4	31.6	7.3	2.1	17.5	9.7	12.7	11.0	8.1
2008 - Qtr 1	30.0	7.8	2.1	18.9	10.5	12.3	10.7	7.9
2008 - Qtr 2	29.9	7.8	2.1	18.8	10.5	12.3	10.7	7.9
2008 - Qtr 3	27.6	8.1	2.1	19.6	10.1	12.7	11.0	8.8

** From Nov 2005

*** from Oct 2005

APPENDIX

LIST OF CHANNELS

<u>Sky wholly owned</u>	<u>Sky Sales</u>	<i>(Discovery)</i>	<i>(EMAP)</i>	<u>IDS</u>	
Sky 1/2/3	History	Discovery +1	Box	Trouble	Virgin 1(+1)
Sky Mix = Sky 2	History +1	Dis H&L	Kerrang	Trouble R	Watch
Sky Sports 1	Nat Geog	Dis H&L +1	Smash	Bravo	Watch +1
Sky Sports 2	Nat Geog +1	Dis T&A	Magic	Bravo +1	
Sky Sports 3	Nat G Adv1	Dis Knowledge	Kiss	Challenge	
Sky Sports News	Hallmark	Dis Sci	Q Chan	Challenge +1	
Sky Sports Extra	Biograph	Dis Wings	Hits	Living	
Premier Plus	FX	Dis Health		Living+1	
Sky Box Office	MUTV	Animal		Living2	
Sky Sport Active 1 - 8	B4	Animal +1		Ex Sports	
The Amp	Chart	Dis Real TM		<i>(UKTV)</i>	
Flaunt	Vault	Dis Real +1		Gold	
Scuzz	FTV	Dis Kids		Gold+1	
All Sky Movies	Artsworld	Dis Real Ex		UKG2	
Sky Cinema 1 - 2	FX+	DMAX (+1)		UKG2+1	
Sky News	Horror			UK Doc	
Sky Travel	Races			UK Doc+1	
Sky Travel +1	Reality			UK Style	
Sky Travel (+1)	Reality +1			UK Style+1	
Sky Travel Extra	Diva			UK Style 2	
Sky Travel Shop	Zona Romantica			Alibi	
Sky Real Lives	Zone Horror +1			Alibi +1	
Sky Movies Active 1 - 8	Discovery Knowledge +1			UK Food	
Diva	Military History			UK Food+1	
Zona Romantica	Hallmark +1			UK History	
	Diva +1			UK History+1	
	DMAX +1.5			UK Bright	
	Sky Arts +1			UK People	
				UK People +1	
				UK Style Leg	
				All Setanta	