

SUMMARY

This issue of Trends in Television is the fourth in a new series. All the data contained in the previous reports are 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 are 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 have slipped a little this quarter after the growth seen recently. However, whilst down a little, the figure for this quarter is high when seen in the context of recent history. (Table 1)

ITV has slightly improved its share this quarter, largely at the expense of BBC1. Channel Four has also had a poor quarter. (Table 2)

Despite the general trend noted above, BBC1 achieved a very good share during Christmas week. This was partly at the expense of ITV, but also of the non-terrestrial channels. (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)

Digital reception is now clearly ahead of analogue reception for the first time. Digital terrestrial reception continues to be the fastest growing platform. (Table 7)

Patronage of all the terrestrial channels except five is lower than a year ago (Table 8).

A new table (Table 9) now shows channel shares accumulated by broadcasting company.

Another new table (Table 10) shows channel impact shares accumulated by the sales houses representing them.

TRENDS IN TELEVISION VIEWING

QTR 4 2004

Produced in association with OMD UK

- February 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

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 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
2004 - Qtr 4	23.8	9.6	23.3	9.0	6.4	72.1	27.9	100

TABLE 3

WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

Week Ending:-	TERRESTRIAL						NON- TERRESTRIAL	<u>TOTAL</u>
	<u>BBC1</u> %	<u>BBC2</u> %	<u>ITV + GMTV</u> %	<u>CH 4</u> %	<u>Five</u> %	<u>TOTAL</u> %	%	%
10.10.04	24.2	9.4	24.0	9.0	6.4	73.0	27.0	100.0
17.10.04	23.7	9.7	23.2	9.1	6.6	72.4	27.6	100.0
24.10.04	23.4	9.9	23.0	8.9	6.8	72.0	28.1	100.0
31.10.04	23.2	9.7	23.5	8.6	6.4	71.4	28.6	100.0
07.11.04	24.1	9.6	22.9	9.2	6.7	72.4	27.6	100.0
14.11.04	24.1	9.6	22.8	9.5	6.7	72.8	27.2	100.0
21.11.04	24.9	9.8	23.1	9.0	6.5	73.3	26.7	100.0
28.11.04	22.4	9.2	25.5	9.2	6.7	73.0	27.0	100.0
05.12.04	21.6	9.8	25.0	9.1	7.1	72.7	27.3	100.0
12.12.04	22.4	9.3	24.0	9.0	6.7	71.3	28.7	100.0
19.12.04	23.1	9.3	23.3	9.2	6.4	71.3	28.7	100.0
26.12.04	26.9	9.2	22.1	9.0	4.9	72.1	27.9	100.0
02.01.05	24.7	9.7	21.3	8.4	5.2	69.3	30.6	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 2nd JANUARY 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	23.8	9.6	23.4	9.0	6.4	72.2	27.8	100.0
All Adults	24.6	10.0	23.9	9.2	6.6	74.2	25.8	100.0
Men	23.8	10.6	20.9	9.3	6.4	71.0	29.0	100.0
Women	25.3	9.5	26.4	9.2	6.6	76.9	23.1	100.0
Housewives	25.6	10.3	25.6	9.4	6.8	77.6	22.4	100.0
HW with children	20.1	6.0	23.6	8.0	6.4	64.1	35.9	100.0
16-34	18.7	6.3	20.3	11.4	6.4	63.2	36.8	100.0
35-54	22.5	8.4	22.8	8.5	6.4	68.5	31.5	100.0
55+	29.8	13.5	26.9	8.7	6.7	85.5	14.5	100.0
ABC1	26.0	10.4	21.0	9.9	5.2	72.5	27.5	100.0
C2DE	23.6	9.7	26.0	8.8	7.5	75.5	24.5	100.0
16-34 ABC1	19.3	6.8	18.2	12.5	5.3	62.0	38.0	100.0
35-54 ABC1	24.4	8.8	20.9	9.2	5.6	68.9	31.1	100.0
55+ ABC1	32.4	14.4	23.0	8.8	4.8	83.4	16.6	100.0
16-34 C2DE	18.3	5.9	22.1	10.5	7.3	64.1	35.9	100.0
35-54 C2DE	21.0	8.0	24.4	7.9	7.1	68.2	31.8	100.0
55+ C2DE	28.3	13.0	29.2	8.6	7.8	86.8	13.2	100.0
CHILDREN	17.3	6.0	18.9	7.1	5.1	54.4	45.6	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 2nd JANUARY 2005

	TERRESTRIAL					NON- TERRESTRIAL	<u>TOTAL</u>	
	<u>BBC1</u>	<u>BBC2</u>	<u>ITV + GMTV</u>	<u>CH 4</u>	<u>Five</u>			<u>TOTAL</u>
	%	%	%	%	%	%	%	
All Individuals	25.6	8.5	29.4	8.3	6.6	78.4	21.6	100.0
All Adults	26.2	8.9	29.8	8.3	6.7	79.8	20.2	100.0
Men	25.1	9.7	26.8	8.6	6.7	76.8	23.2	100.0
Women	27.1	8.2	32.2	8.1	6.7	82.2	17.8	100.0
Housewives	27.1	8.9	31.5	8.2	6.9	82.6	17.4	100.0
HW with children	22.7	5.4	28.6	8.6	7.2	72.5	27.5	100.0
16-34	20.7	6.3	24.4	11.8	7.3	70.4	29.6	100.0
35-54	24.2	7.8	28.1	8.2	6.9	75.2	24.8	100.0
55+	30.8	11.1	33.9	6.5	6.2	88.5	11.5	100.0
ABC1	28.1	10.0	25.3	9.5	5.4	78.3	21.7	100.0
C2DE	24.7	8.0	33.3	7.4	7.7	81.0	19.0	100.0
16-34 ABC1	21.5	7.2	21.6	13.0	6.0	69.1	30.9	100.0
35-54 ABC1	26.3	8.9	24.6	9.3	5.9	75.1	24.9	100.0
55+ ABC1	34.0	12.8	28.3	7.4	4.6	87.2	12.8	100.0
16-34 C2DE	20.1	5.5	27.0	10.7	8.4	71.6	28.4	100.0
35-54 C2DE	22.2	6.7	31.3	7.3	7.8	75.3	24.7	100.0
55+ C2DE	28.6	10.0	37.6	5.9	7.2	89.3	10.7	100.0
CHILDREN	19.6	4.5	25.7	8.6	6.1	64.4	35.6	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 2nd JANUARY 2005

	TERRESTRIAL					NON- TERRESTRIAL	<u>TOTAL</u>	
	<u>BBC1</u> %	<u>BBC2</u> %	<u>ITV + GMTV</u> %	<u>CH 4</u> %	<u>Five</u> %	<u>TOTAL</u> %	%	
All Platforms	23.9	9.4	23.5	9.0	6.4	72.2	27.8	100.0
Dig-sat	17.4	5.0	18.4	5.5	3.9	50.2	49.8	100.0
Dig-cable	16.5	5.3	18.7	5.6	5.0	51.1	48.9	100.0
Dig-terr	25.7	10.5	22.9	10.2	7.8	77.1	22.9	100.0
Total dig	18.8	6.3	19.2	6.5	5.0	55.8	44.2	100.0
Anlg-cable	14.0	6.2	18.2	5.4	6.2	50.0	50.0	100.0
Anlg terr	33.0	14.5	31.3	13.0	8.2	100.0	0.0	100.0
Total anlg	31.4	13.7	29.7	12.5	8.2	95.5	4.5	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	2,223	974	8,716	15,865	1,637	14,013	24,528
	<i>22.8</i>	<i>9.1</i>	<i>4.0</i>	<i>35.5</i>	<i>64.7</i>	<i>6.7</i>	<i>57.1</i>	<i>100</i>
01.07.02	5,730	2,338	997	8,905	15,731	1,310	14,136	24,570
	<i>23.3</i>	<i>10</i>	<i>4.1</i>	<i>36.2</i>	<i>64.0</i>	<i>5.3</i>	<i>57.5</i>	<i>100</i>
01.10.02	6,105	2,292	763	9,015	15,645	1,148	14,265	24,613
	<i>24.8</i>	<i>9</i>	<i>3.1</i>	<i>36.6</i>	<i>63.6</i>	<i>4.7</i>	<i>58.0</i>	<i>100</i>
01.01.03	6,247	2,516	873	9,491	15,283	924	14,127	24,727
	<i>25.3</i>	<i>10</i>	<i>3.5</i>	<i>38.4</i>	<i>61.8</i>	<i>3.7</i>	<i>57.1</i>	<i>100</i>
01.04.03	6,372	2,156	1,398	9,718	15,101	1,222	13,647	24,772
	<i>25.7</i>	<i>9</i>	<i>5.6</i>	<i>39.2</i>	<i>61.0</i>	<i>4.9</i>	<i>55.1</i>	<i>100</i>
01.07.03	6,470	2,156	1,510	9,928	14,930	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	10,354	14,544	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	10961	13688	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	11579	13088	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	12114	12679	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	12632	12241	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	13526	11420	764	10525	24842
	<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>

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
	<u>BBC1</u>	<u>BBC2</u>	<u>ITV + GMTV</u>	<u>CH 4</u>	<u>Five</u>	%	%
	%	%	%	%	%		
2002 October	87.4	77.8	84.0	72.7	52.9	42.5	92.9
November	88.2	78.9	85.5	76.1	53.0	43.3	93.3
December	88.6	77.5	85.6	76.1	51.2	44.3	93.8
2003 January	88.9	79.3	86.3	76.1	51.7	44.5	94.0
February	89.9	79.3	86.9	76.7	54.3	46.2	95.3
March	89.5	77.8	85.4	73.7	52.3	46.9	95.4
April	88.5	77.0	85.9	74.1	52.0	46.9	94.7
May	87.8	76.1	85.5	74.3	52.4	47.0	94.8
June	86.7	73.7	82.5	73.1	50.7	45.9	93.9
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

* 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 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
2004 - Qtr 4	35.7	25.2	9.5	6.4	6.9	2.7	1.8	1.2	10.6

* 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 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
2004 - Qtr 4	39.6	3.5	2.7	15.4	10.5	12.3	8.4	7.6

* 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

(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
 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