



TRENDS IN TELEVISION VIEWING

Quarter 4 2005

Produced in association with OMD UK

Mar-06

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	3.81	3.65

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>CH4</u> %	<u>Five</u> %	<u>TOTAL</u> %	%	%
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
2005 - Qtr4	23.3	9.2	22.3	8.7	6.2	69.6	30.4	100.0

TABLE 3

WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

Week Ending:-	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1 %	BBC2 %	TV + GMTV %	CH4 %	Five %		%	%
09.10.05	23.7	8.5	22.4	8.9	6.4	69.9	30.1	100.0
16.10.05	24.5	8.8	21.5	8.9	6.6	70.3	29.7	100.0
23.10.05	23.5	8.7	21.9	8.4	6.5	69.1	30.9	100.0
30.10.05	23.2	8.7	21.6	8.6	6.1	68.1	31.9	100.0
06.11.05	22.6	9.6	21.7	8.7	6.6	69.1	30.9	100.0
13.11.05	24.3	9.3	22.5	8.8	5.7	70.5	29.5	100.0
20.11.05	23.9	9.1	22.4	8.9	6.4	70.7	29.3	100.0
27.11.05	22.6	9.0	24.6	8.6	5.7	70.5	29.5	100.0
04.12.05	22.0	8.2	26.2	8.4	6.0	70.9	29.1	100.0
11.12.05	22.2	8.9	23.6	8.6	6.1	69.3	30.7	100.0
18.12.05	22.2	10.2	22.4	8.5	6.5	69.8	30.2	100.0
25.12.05	24.1	9.7	20.0	9.7	6.1	69.6	30.4	100.0
01.01.06	23.9	11.2	18.7	7.8	5.7	67.3	32.7	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 1st JANUARY 2006

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	TV + GMTV	CH4	Five		%	%
	%	%	%	%	%	%		%
All Individuals	23.3	9.2	22.2	8.7	6.2	69.6	30.4	100.0
All Adults	24.1	9.7	22.8	8.8	6.3	71.7	28.3	100.0
Men	23.1	10.3	19.8	9.0	6.1	68.3	31.7	100.0
Women	24.8	9.2	25.2	8.7	6.4	74.3	25.7	100.0
Housewives	25.0	9.9	24.3	8.9	6.6	74.7	25.3	100.0
HW with children	19.0	5.4	22.0	7.8	6.0	60.2	39.8	100.0
16-34	18.3	5.9	18.6	10.9	5.9	59.7	40.3	100.0
35-54	21.0	7.7	22.0	8.3	6.1	65.2	34.8	100.0
55+	29.8	13.4	25.8	8.1	6.7	83.8	16.2	100.0
ABC1	25.7	10.1	20.0	9.3	5.3	70.5	29.5	100.0
C2DE	22.9	9.4	24.8	8.5	7.0	72.6	27.4	100.0
16-34 ABC1	19.4	6.6	17.2	12.2	5.5	60.8	39.2	100.0
35-54 ABC1	23.1	8.5	20.7	8.6	5.3	66.3	33.7	100.0
55+ ABC1	32.6	14.1	21.3	8.0	5.0	81.1	18.9	100.0
16-34 C2DE	17.4	5.4	19.8	9.9	6.3	58.8	41.2	100.0
35-54 C2DE	19.2	7.1	23.2	8.0	6.7	64.2	35.8	100.0
55+ C2DE	28.2	12.9	28.5	8.1	7.7	85.4	14.6	100.0
CHILDREN	16.2	5.6	17.4	7.3	5.0	51.5	48.5	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 1st JANUARY 2006

	TERRESTRIAL					TOTAL	NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	TV + GMTV	CH 4	Five		%	%
	%	%	%	%	%	%		%
All Individuals	24.9	8.5	28.5	8.1	6.2	76.2	23.8	100.0
All Adults	25.6	8.9	28.9	8.0	6.3	77.7	22.3	100.0
Men	24.4	9.5	26.0	8.3	6.3	74.5	25.5	100.0
Women	26.6	8.5	31.2	7.8	6.2	80.2	19.8	100.0
Housewives	26.5	9.1	30.3	7.9	6.4	80.3	19.7	100.0
HW with children	21.2	5.3	27.5	8.4	6.6	69.0	31.0	100.0
16-34	20.3	6.2	22.9	11.7	6.7	67.9	32.1	100.0
35-54	22.6	7.5	27.8	8.0	6.4	72.3	27.7	100.0
55+	30.7	11.4	32.9	6.1	5.9	87.0	13.0	100.0
ABC1	27.5	10.1	24.3	9.1	5.4	76.4	23.6	100.0
C2DE	24.1	8.0	32.6	7.1	6.9	78.7	21.3	100.0
16-34 ABC1	21.2	7.1	20.4	12.9	6.4	68.0	32.0	100.0
35-54 ABC1	24.7	8.9	24.8	8.8	5.7	72.9	27.1	100.0
55+ ABC1	34.0	13.0	26.2	7.0	4.6	84.9	15.1	100.0
16-34 C2DE	19.4	5.3	25.2	10.7	7.1	67.7	32.3	100.0
35-54 C2DE	20.7	6.3	30.5	7.2	7.1	71.8	28.2	100.0
55+ C2DE	28.5	10.4	37.3	5.5	6.8	88.5	11.5	100.0
CHILDREN	18.2	4.6	24.4	9.2	5.4	61.9	38.1	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 1st JANUARY 2006

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
01.10.02	6,105 <i>24.8</i>	2,292 <i>9</i>	763 <i>3.1</i>	9,015 36.6	15,645 63.6	1,148 <i>4.7</i>	14,265 <i>58.0</i>	24,613 <i>100</i>
01.01.03	6,247 <i>25.3</i>	2,516 <i>10</i>	873 <i>3.5</i>	9,491 38.4	15,283 61.8	924 <i>3.7</i>	14,127 <i>57.1</i>	24,727 <i>100</i>
01.04.03	6,372 <i>25.7</i>	2,156 <i>9</i>	1,398 <i>5.6</i>	9,718 39.2	15,101 61.0	1,222 <i>4.9</i>	13,647 <i>55.1</i>	24,772 <i>100</i>
01.07.03	6,470 <i>26.1</i>	2,156 <i>9</i>	1,510 <i>6.1</i>	9,928 40.0	14,930 60.2	1,122 <i>4.5</i>	13,576 <i>54.7</i>	24,811 <i>100</i>
01.10.03	6,600 <i>26.6</i>	2,250 <i>9</i>	1,710 <i>6.9</i>	10,354 41.7	14,544 58.5	1,010 <i>4.1</i>	13,303 <i>53.5</i>	24,857 <i>100</i>
01.01.04	6785 <i>27.6</i>	2326 <i>9.5</i>	2075 <i>8.4</i>	10961 44.5	13688 55.6	951 <i>3.9</i>	12576 <i>51.1</i>	24612 <i>100.0</i>
01.04.04	6830 <i>27.7</i>	2356 <i>9.6</i>	2695 <i>10.9</i>	11579 46.9	13088 53.1	921 <i>3.7</i>	12011 <i>48.7</i>	24667 <i>100.0</i>
01.07.04	6981 <i>28.2</i>	2404 <i>9.7</i>	3084 <i>12.5</i>	12114 49.0	12679 51.3	921 <i>3.7</i>	11602 <i>46.9</i>	24723 <i>100.0</i>
01.10.04	7001 <i>28.3</i>	2555 <i>10.3</i>	3451 <i>13.9</i>	12632 51.0	12241 49.4	813 <i>3.3</i>	11272 <i>45.5</i>	24779 <i>100.0</i>
01.01.05	7146 <i>28.8</i>	2599 <i>10.5</i>	4216 <i>17.0</i>	13526 54.4	11420 46.0	764 <i>3.1</i>	10525 <i>42.4</i>	24852 <i>100.0</i>
01.04.05	7337 <i>29.5</i>	2645 <i>10.6</i>	4674 <i>18.8</i>	14107 56.7	10874 43.7	718 <i>2.9</i>	10031 <i>40.3</i>	24900 <i>100.0</i>
01.07.05	7595 <i>30.4</i>	2609 <i>10.5</i>	4940 <i>19.8</i>	14577 58.4	10446 41.9	679 <i>2.7</i>	9650 <i>38.7</i>	24948 <i>100.0</i>
01.10.05	7751 <i>31.0</i>	2649 <i>10.6</i>	5316 <i>21.3</i>	15149 60.6	9922 39.7	652 <i>2.6</i>	9153 <i>36.6</i>	24996 <i>100.0</i>
01.01.06	7815 <i>31.1</i>	2703 <i>10.7</i>	6363 <i>25.3</i>	16162 64.2	9060 36.0	594 <i>2.4</i>	8349 <i>33.2</i>	25164 <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>	%	%
	%	%	%	%	%		
2003 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
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

* 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 Channel</u> %
<i>Includes:-</i>	BBC1 BBC2 BBC3 BBC4 BBC NEWS 24 CBBC/CBEEBIE	ITV1 ITV2 ITV3* ITV4** ITN NEWS GMTV Men & M	CH 4 E4 FILM FOUR S4C More4***	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 4	37.9	24.8	10.0	6.3	6.5	2.4	1.4	1.3
2004 - Qtr 1	37.3	25.0	10.0	6.5	6.6	2.5	1.6	1.4
2004 - Qtr 2	36.2	23.6	11.2	6.9	6.3	2.6	1.9	1.4
2004 - Qtr 3	37.1	22.1	11.5	6.3	6.2	2.5	1.8	1.4
2004 - Qtr 4	35.7	25.2	9.5	6.4	6.9	2.7	1.8	1.2
2005 - Qtr 1	35.8	24.6	10.5	6.5	6.3	2.6	2.0	1.6
2005 - Qtr 2	35.9	23.3	11.1	6.7	6.0	2.9	2.2	1.5
2005 - Qtr 3	34.1	23.1	12.7	6.5	6.1	2.9	1.9	1.6
2005 - Qtr4	35.3	25.1	10.1	6.2	6.2	2.7	2.0	1.7
		* From Nov 2004	** From Nov 2005			*** from Oct 2005		

TABLE 10

TRENDS IN IMPACTS SHARE BY SALES HOUSE

	<u>ITV1</u> %	<u>Other ITV</u> %	<u>GMTV</u> %	<u>CH4</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 & 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>		
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	4.9	2.6	19.1	10.9	12.4	8.6	8
2005 - Qtr4	36.8	5.3	2.5	15.6	10.2	13.1	8.6	7.9

* 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
 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
 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