

Q4 2007 TRENDS IN TV REPORT SUMMARY

Overall television viewing levels have recorded an increase for the third consecutive quarter, resulting in an average daily hours on viewing of 3.63 hours for 2007 compared to 3.60 hours in 2006. (Table 1)

In terms of audience share, BBC1 and ITV have both had a good fourth quarter – taking 22.4% and 19.7% shares, respectively (Table 2). In particular, BBC1 enjoyed an increased share of viewing of 24.7% during the Christmas week. (Table 3)

Demographically, individual 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 and is now covering over 82% of all television households. Digital terrestrial reception remains the fastest growing platform and is now serving 47% of the television population. (Table 6)

Patronage levels for the main channels (and for television overall) are at about the same levels as they were a year ago. Patronage of the non-terrestrial channels is now over 75% for the first time. (Table 7)

Table 8 shows channel shares accumulated by broadcasting company.

Table 9 shows channel impact shares accumulated by the sales houses representing them. ITV takes by far the largest share of 38.9% across all its channels

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.



TRENDS IN TELEVISION VIEWING

QTR 4 2007

February 2008

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>			3.41*	4.09	#
<i>1992</i>	4.13	3.52	3.55	4.03	3.81
<i>1993</i>	4.07	3.41	3.34	3.93	3.69
<i>1994</i>	3.91	3.38	3.28	3.82	3.60
<i>1995</i>	3.94	3.38	3.21	3.84	3.59
<i>1996</i>	3.95	3.39	3.25	3.78	3.59
<i>1997</i>	3.89	3.41	3.29	3.77	3.59
<i>1998</i>	3.84	3.46	3.34	3.78	3.61
<i>1999</i>	3.91	3.48	3.35	3.93	3.67
<i>2000</i>	3.86	3.49	3.43	3.91	3.67
<i>2001</i>	3.95	3.46	3.34	3.75	3.62
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
2006	3.89	3.43	3.31	3.76	3.60
2007	3.85	3.46	3.38	3.83	3.63

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
	BBC1	BBC2	ITV1 + GMTV	CH 4	CH4+1	Five	TOTAL			
	%	%	%	%	%	%	%	%	%	
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
2007 - Qtr 4	22.4	8.6	19.7	7.6	0.5	4.8	63.5	36.5	100.0	61.4

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:-									
07.10.07	21.9	8.4	20.8	7.1	0.4	5.0	63.7	36.3	100.0
14.10.07	23.3	8.1	20.7	7.4	0.4	5.0	64.9	35.1	100.0
21.10.07	21.9	7.7	22.6	7.5	0.4	4.9	65.1	34.9	100.0
28.10.07	21.1	8.6	19.3	7.1	0.4	5.0	61.5	38.5	100.0
04.11.07	22.4	8.5	20.0	7.5	0.4	4.7	63.5	36.5	100.0
11.11.07	22.3	8.8	19.7	7.6	0.5	5.1	63.9	36.1	100.0
18.11.07	22.8	8.9	19.7	7.5	0.4	5.1	64.5	35.5	100.0
25.11.07	23.1	8.4	20.0	7.5	0.5	4.9	64.4	35.6	100.0
02.12.07	21.9	8.7	20.4	8.4	0.5	4.7	64.6	35.4	100.0
09.12.07	21.9	8.4	19.3	8.2	0.5	4.8	63.1	36.9	100.0
16.12.07	21.7	7.9	20.2	8.2	0.5	4.5	63.0	37.0	100.0
23.12.07	21.3	9.4	17.8	8.1	0.5	4.8	61.9	38.1	100.0
30.12.07	24.7	9.6	16.2	6.6	0.5	4.3	62.0	38.0	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 30th DECEMBER 2007

	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%
All Individuals	22.4	8.6	19.7	8.0	4.8	63.5	36.5	100.0
All Adults	23.2	8.9	20.3	8.2	5.0	65.5	34.5	100.0
Men	22.4	9.5	17.8	7.9	5.0	62.5	37.5	100.0
Women	23.8	8.5	22.3	8.4	5.0	67.9	32.1	100.0
Housewives	24.2	9.2	21.6	8.4	5.3	68.6	31.4	100.0
HW with children	17.9	5.6	19.5	7.8	4.3	55.1	44.9	100.0
16-34	16.0	6.4	15.8	9.2	4.1	51.5	48.5	100.0
35-54	20.9	7.7	19.7	7.8	4.8	60.9	39.1	100.0
55+	28.8	11.2	23.1	8.0	5.5	76.5	23.5	100.0
ABC1	24.9	9.8	17.9	8.1	3.8	64.5	35.5	100.0
C2DE	22.0	8.3	22.0	8.2	5.8	66.3	33.7	100.0
16-34 ABC1	17.9	7.9	15.0	9.6	3.6	54.0	46.0	100.0
35-54 ABC1	22.3	8.6	18.5	7.6	3.8	60.8	39.2	100.0
55+ ABC1	31.8	12.3	19.2	7.6	4.0	74.8	25.2	100.0
16-34 C2DE	14.3	5.1	16.6	8.8	4.6	49.5	50.5	100.0
35-54 C2DE	19.8	7.0	20.6	7.9	5.5	60.9	39.1	100.0
55+ C2DE	27.0	10.6	25.4	8.2	6.5	77.6	22.4	100.0
CHILDREN	14.6	5.5	14.3	6.8	3.5	44.8	55.2	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 30th DECEMBER 2007

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%
All Individuals	24.6	9.6	24.2	7.6	5.0	70.9	29.1	100.0
All Adults	25.2	9.9	24.5	7.5	5.1	72.2	27.8	100.0
Men	24.0	10.5	22.4	7.3	5.2	69.5	30.5	100.0
Women	26.1	9.5	26.2	7.7	4.9	74.4	25.6	100.0
Housewives	26.1	10.1	25.5	7.6	5.3	74.6	25.4	100.0
HW with children	19.9	7.0	23.9	8.8	4.6	64.3	35.7	100.0
16-34	17.7	8.4	19.6	10.0	4.6	60.3	39.7	100.0
35-54	22.3	9.3	24.0	7.6	5.1	68.2	31.8	100.0
55+	31.2	11.2	27.4	6.2	5.3	81.3	18.7	100.0
ABC1	27.1	11.5	20.9	8.0	4.1	71.6	28.4	100.0
C2DE	23.7	8.7	27.4	7.1	5.9	72.7	27.3	100.0
16-34 ABC1	19.3	10.4	17.6	10.4	4.1	61.9	38.1	100.0
35-54 ABC1	24.1	10.6	21.7	7.9	4.1	68.5	31.5	100.0
55+ ABC1	34.8	12.9	22.2	6.6	4.1	80.6	19.4	100.0
16-34 C2DE	16.2	6.5	21.5	9.6	5.0	58.9	41.1	100.0
35-54 C2DE	20.7	8.0	26.1	7.3	6.0	68.0	32.0	100.0
55+ C2DE	28.8	10.1	30.8	5.9	6.1	81.8	18.2	100.0
CHILDREN	17.9	5.7	21.2	8.8	3.8	57.5	42.5	100.0

TABLE 6

PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
01.10.04	7001	2555	3451	12632	12241	813	11272	24779
	28.3	10.3	13.9	51.0	49.4	3.3	45.5	100.0
01.01.05	7146	2599	4216	13526	11420	764	10525	24852
	28.8	10.5	17.0	54.4	46.0	3.1	42.4	100.0
01.04.05	7337	2645	4674	14107	10874	718	10031	24900
	29.5	10.6	18.8	56.7	43.7	2.9	40.3	100.0
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

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		
	%	%	%	%	%	%	%
2005 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
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

* 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>	BBC1		ITV1	CH 4	Five	All Sky branded	All UK branded	All other Flextech	All Discovery branded	
	BBC2		ITV2	E4	Five Life(+1)	channels	channels	channels:-	channels & Animal	
	BBC3		ITV3	FILM FOUR	Five US(+1)			Bravo		
	BBC4		ITV4**	S4C				Challenge		
	BBC NEWS 24		ITN NEWS	More4***				Ex. Sports		
	CBBC/CBEEBIES		GMTV	CH4+1				FTN		
			Men & M					Living		
								Trouble		
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
2007 - Qtr 4	34.5	65.5	23.9	10.8	5.8	6.4	3.5	2.3	1.1	11.7

** 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>GMTV</i>	<i>CH 4</i>	<i>Five</i>	<i>----- See Appendix -----</i>		
		<i>ITV3</i>		<i>E4</i>				
		<i>ITN NEWS</i>		<i>FILM FOUR</i>				
		<i>ITV4**</i>		<i>S4C</i>				
		<i>Men & M</i>		<i>More4***</i>				
				<i>CH4+1</i>				
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
2007 - Qtr 4	31.6	7.3	2.1	17.5	9.7	12.7	11.0	8.1

** From Nov 2005

*** from Oct 2005

APPENDIX

LIST OF CHANNELS

Sky wholly owned	Sky Sales	(Discovery)	(EMAP)	IDS
Sky One	History	Discovery+1	Box	Trouble
Sky Mix = Sky 2	History+1	Dis H&L	Kerrang	Trouble R
Sky Sports 1	Nat Geog	Dis H&L+1	Smash	Bravo
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		(UKTV)
Flaunt	Vault	Dis Real +1		UK Gold
Scuzz	FTV	Dis Kids		UK 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			UK Drama
Sky Real Lives				UK Food
Sky Movies Active 1 - 8				UK Food+1
Diva				UK History
Zona Romantica				UK History+1
				UK Bright
				UK People
				UK People +1
				UK Style Leg
				All Setanta
				Virgin 1(+1)