

SUMMARY

This is the seventh issue of Trends in Television since the start of the new contract and new panel in January 2002.

As before, some data is shown from the previous panel to provide a context, but care should be taken in comparing data from the two different panels.

Overall viewing are again high compared with recent years. This is now the fourth consecutive quarter to have shown overall viewing at a higher level than comparable previous quarters.

ITV's share of viewing continues to decline, as the growth of the non-terrestrial channels puts pressure on the major terrestrial channels. (Table 2)

Channel Four's share reached a high at the end of last quarter, but has since declined a little, ending up only slightly higher over the quarter as a whole. (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)

The digital terrestrial platform continues to show strong growth. For the first time we now see the number of digital homes standing at over 10 million. (Table 6)

Patronage figures are a little higher for most channels than they were a year ago, especially for the non-terrestrial channels as they increase their subscriber base. (Table 7).



TRENDS IN TELEVISION VIEWING
Quarter 1 2004

Produced in association with OMD UK

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				

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

TABLE 3

**WEEKLY CHANNEL SHARES
ALL INDIVIDUALS**

THIS QUARTER

	TERRESTRIAL						NON- TERRESTRIA L	TOTAL
	<u>BBC1</u> %	<u>BBC2</u> %	<u>ITV + GMTV</u> %	<u>CH 4</u> %	<u>Five</u> %	<u>TOTAL</u> %	%	%
Week Ending:-								
04.01.04	26.3	12.1	23.6	8.7	5.1	75.8	24.2	100.0
11.01.04	25.2	11.4	23.7	9.6	6.6	76.4	25.2	100.0
18.01.04	25.5	10.8	24.8	9.5	6.3	76.8	23.2	100.0
25.01.04	25.6	11.0	23.7	9.5	6.7	76.6	23.4	100.0
01.02.04	23.7	10.7	25.9	9.3	6.8	76.3	23.7	100.0
08.02.04	23.7	10.8	26.5	9.3	6.8	77.2	22.8	100.0
15.02.04	25.1	9.9	24.8	9.6	7.2	76.6	23.4	100.0
22.02.04	23.8	11.5	23.6	9.8	6.3	75.1	25.0	100.0
29.02.04	25.2	10.4	23.5	9.8	6.9	75.8	24.2	100.0
07.03.04	25.2	10.8	23.0	9.4	7.0	75.5	24.5	100.0
14.03.04	24.4	10.7	23.0	9.4	6.7	74.1	25.9	100.0
21.03.04	24.5	10.5	22.7	9.6	7.0	74.4	25.5	100.0
28.03.04	24.9	10.9	22.5	9.3	7.1	74.8	25.2	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 28th MARCH 2004

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4	Five	TOTAL	L	
	%	%	%	%	%	%	%	%
All Individuals	24.8	10.8	24.0	9.4	6.6	75.6	24.4	100.0
All Adults	25.5	11.0	24.5	9.8	6.7	77.5	22.4	100.0
Men	24.9	11.5	21.8	9.6	6.8	74.6	25.4	100.0
Women	26.0	10.6	26.7	10.0	6.7	80.0	20.0	100.0
Housewives	26.2	11.2	25.8	10.1	6.9	80.2	19.8	100.0
HW with children	21.4	7.2	24.7	8.2	6.5	68.0	31.9	100.0
16-34	20.5	8.0	21.8	11.0	6.3	67.6	32.4	100.0
35-54	23.5	9.3	23.7	9.2	6.6	72.3	27.7	100.0
55+	30.0	14.2	26.7	9.7	7.0	87.6	12.5	100.0
ABC1	27.3	11.9	22.5	11.1	5.5	78.3	21.7	100.0
C2DE	24.2	10.4	25.9	9.0	7.5	77.0	23.0	100.0
16-34 ABC1	21.6	9.0	20.7	13.2	5.7	70.2	29.8	100.0
35-54 ABC1	25.3	10.1	22.4	10.4	5.8	74.0	26.0	100.0
55+ ABC1	33.3	15.8	23.8	10.3	5.2	88.4	11.7	100.0
16-34 C2DE	19.7	7.2	22.7	9.2	6.7	65.5	34.4	100.0
35-54 C2DE	21.9	8.7	24.8	8.2	7.3	70.9	29.1	100.0
55+ C2DE	28.1	13.2	28.3	9.4	8.0	87.0	12.9	100.0
CHILDREN	18.9	9.0	19.8	5.6	5.5	58.8	41.2	100.0

TABLE 5

CHANNEL SHARES BY DEMOGRAPHICS - PEAK TIME

(1800-2259)

ALL INDIVIDUALS - 13 W/E 28th MARCH 2004

	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>	L	
	%	%	%	%	%	%	%	%
All Individuals	26.3	9.2	30.5	8.9	6.6	81.5	18.5	100.0
All Adults	26.9	9.3	30.8	9.1	6.7	82.8	17.3	100.0
Men	26.1	10.3	28.0	8.8	6.9	80.1	19.9	100.0
Women	27.5	8.5	33.1	9.3	6.5	84.9	15.1	100.0
Housewives	27.4	9.2	32.3	9.3	6.7	84.9	15.1	100.0
HW with children	23.8	6.6	29.9	8.9	6.8	76.0	24.1	100.0
16-34	22.2	7.9	25.8	11.6	6.8	74.3	25.8	100.0
35-54	24.9	8.5	29.3	9.2	6.9	78.8	21.3	100.0
55+	31.0	10.7	34.8	7.8	6.4	90.7	9.5	100.0
ABC1	29.0	10.8	27.0	10.8	5.6	83.2	16.8	100.0
C2DE	25.3	8.1	33.8	7.8	7.5	82.5	17.6	100.0
16-34 ABC1	23.4	9.2	23.6	13.8	6.1	76.1	23.9	100.0
35-54 ABC1	26.8	9.7	26.4	10.7	6.1	79.7	20.2	100.0
55+ ABC1	34.6	13.0	29.8	9.0	4.8	91.2	8.8	100.0
16-34 C2DE	21.2	6.7	27.8	9.6	7.3	72.6	27.4	100.0
35-54 C2DE	23.2	7.4	31.9	7.7	7.7	77.9	22.2	100.0
55+ C2DE	28.6	9.1	38.0	7.0	7.4	90.1	9.9	100.0
CHILDREN	20.7	8.6	27.6	6.4	6.1	69.4	30.7	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM

ALL TIME

ALL INDIVIDUALS - 13 W/E 28th MARCH 2004

	TERRESTRIAL						NON- TERRESTRIA L	<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	24.8	10.9	24.0	9.4	6.6	75.7	24.3	100.0
Dig-sat	16.9	5.6	18.8	5.5	3.8	50.6	49.4	100.0
Dig-cable	17.7	6.2	19.0	6.3	5.1	54.3	45.7	100.0
Dig-terr	27.6	12.1	23.5	10.9	8.5	82.6	17.4	100.0
Total dig	19.1	7.0	19.7	6.7	5.0	57.5	42.5	100.0
Anlg-cable	14.7	5.8	17.1	6.0	5.7	49.3	50.7	100.0
Anlg terr	32.8	15.5	30.7	12.9	8.1	100.0	0.0	100.0
Total anlg	32.0	15.0	29.7	12.7	8.2	97.6	2.4	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
	22.8	9.1	4.0	35.5	64.7	6.7	57.1	100
01.07.02	5,730	2,338	997	8,905	15,731	1,310	14,136	24,570
	23.3	10	4.1	36.2	64.0	5.3	57.5	100
01.10.02	6,105	2,292	763	9,015	15,645	1,148	14,265	24,613
	24.8	9	3.1	36.6	63.6	4.7	58.0	100
01.01.03	6,247	2,516	873	9,491	15,283	924	14,127	24,727
	25.3	10	3.5	38.4	61.8	3.7	57.1	100
01.04.03	6,372	2,156	1,398	9,718	15,101	1,222	13,647	24,772
	25.7	9	5.6	39.2	61.0	4.9	55.1	100
01.07.03	6,470	2,156	1,510	9,928	14,930	1,122	13,576	24,811
	26.1	9	6.1	40.0	60.2	4.5	54.7	100
01.10.03	6,600	2,250	1,710	10,354	14,544	1,010	13,303	24,857
	26.6	9	6.9	41.7	58.5	4.1	53.5	100
01.01.04	6,785	2,326	2,075	10,961	13,688	951	12,576	24,612
	27.6	9.5	8.4	44.5	55.6	3.9	51.1	100.0
01.04.04	6,830	2,356	2,695	11,579	13,088	921	12,011	24,667
	27.7	9.6	10.9	46.9	53.1	3.7	48.7	100.0

NOTE: Included in the total are a small number of homes (less than 1%) still receiving analogue satellite signals

TABLE 8

AVERAGE WEEKLY PATRONAGE*
ALL INDIVIDUALS

CONSOLIDATED DATA

						NON- TERRESTRIAL	ANY TV AT ALL
TERRESTRIAL						L	
	<u>BBC1</u>	<u>BBC2</u>	<u>TV + GMTV</u>	<u>CH 4</u>	<u>Five</u>		
	%	%	%	%	%	%	%
2002 January	85.3	75.6	83.1	73.7	48.9	38.4	91.1
February	87.2	77.2	85.7	76.3	52.0	41.3	93.5
March	85.5	76.6	84.2	73.8	50.0	41.1	92.9
April	82.2	71.4	81.3	70.0	49.0	40.6	90.0
May	83.3	71.9	80.3	70.2	48.6	40.1	89.5
June	85.8	73.4	82.9	73.1	49.9	40.4	91.1
July	84.8	74.5	81.6	75.0	50.1	41.8	91.9
August	83.8	73.1	81.1	70.2	48.0	41.1	90.5
September	85.8	74.2	83.4	70.2	50.4	42.3	92.2
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

* 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
ALL INDIVIDUALS

	<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 Char</u> %	<u>Other</u> %	<u>TOTAL</u> %
<i>Includes:-</i>	<i>BBC1</i> <i>BBC2</i> <i>BBC3</i> <i>BBC4</i> <i>BBC NEWS 24</i> <i>CBBC/CBEEBIES</i>	<i>ITV1</i> <i>ITV2</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>All Sky branded channels</i>	<i>All UK branded channels</i>	<i>All other Flextech channels</i>	<i>Discovery branded channels & Animal</i>		
2003 - Qtr 1	39.1	24.8	9.8	6.3	6.9	2.3	1.3	1.1	8.4	100.0
2003 - Qtr 2	37.6	24.5	10.8	6.4	6.6	2.3	1.6	1.2	9.0	100.0
2003 - Qtr 3	37.6	24.1	10.9	6.5	6.2	2.5	1.5	1.3	9.4	100.0
2003 - Qtr 4	37.9	24.8	10.0	6.3	6.5	2.4	1.4	1.3	9.4	100.0
2004 - Qtr 1	37.3	25.0	10.0	6.5	6.6	2.5	1.6	1.4	9.1	100.0

TABLE 10

TRENDS IN IMPACTS SHARE BY SALES HOUSE
ALL INDIVIDUALS

	<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>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%	%
<i>Includes:-</i>	<i>ITV1</i>	<i>ITV2</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	44.5	1.6	2.8	17.4	11.0	11.0	6.5	5.4	100.0
2003 - Qtr 2	42.6	1.9	2.8	18.6	11.1	10.6	6.7	5.9	100.0
2003 - Qtr 3	41.4	1.9	3.0	18.2	11.3	10.9	7.1	6.4	100.0
2003 - Qtr 4	42.3	1.9	2.9	17.3	10.9	11.3	6.8	6.5	100.0
2004 - Qtr 1	42.7	1.8	2.8	16.9	11.0	11.4	7.3	6.0	100.0

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
 Sky Sport Active 2
 Sky Sport Active 3
 Sky Sport Active 4
 The Amp
 Flaunt
 Scuzz
 Sky Movies 1
 Sky Movies 2
 Sky Movies 3
 Sky Movies 4
 Sky Movies 5
 Sky Movies 6
 Sky Movies 7
 Sky Movies 8
 Sky Movies 9
 Sky Cinema 1
 Sky Cinema 2
 Sky News
 Sky Travel
 Sky Travel S
 Sky Travel 2

Sky Sales

History
 History+1
 Nat Geog
 Nat Geog+1
 Nat G Adv1
 Hallmark
 Biograph
 FX

 Discovery
 Discovery+1
 Dis H&L
 Dis H&L+1
 Dis T&A
 Dis Civil
 Dis Sci
 Dis Wings
 Dis Health
 Animal
 Animal+1

 Box
 Kerrang
 Smash
 Magic
 Kiss
 Q Chan

IDS

Trouble
 Trouble R
 Bravo
 Bravo+1
 Challenge
 Living
 Living+1
 Ex Sports
 FTN
(UKTV)
 UK Gold
 UK Gold+1
 UKG2
 UK Doc
 UK Doc+1
 UK Style
 UK Style+1
 UK Drama
 UK Food
 UK Food+1
 UK History
 UK History+1
 UK Bright