

SUMMARY

Overall television viewing levels continue to be high in comparison with previous quarters. Average daily hours of viewing now stands at 3.57 hours compared to 3.46 hours for Quarter 2 2007. (Table 1)

The non-terrestrial channels share of viewing continues to grow, albeit marginally this quarter. However, the percentage of viewing to channels carrying advertising grew to 62%. (Table 2)

Channel Four +1's share of viewing is growing well, and this can be seen throughout the quarter. (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 percentage of all homes able to receive digital broadcasts now stands at 83.5%. All forms of digital reception – satellite, cable and terrestrial – recorded growth this quarter. (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 has now established itself at over 75%. (Table 7)

Table 8 shows channel shares accumulated by broadcasting company. The BBC has the largest audience share at 33.5% followed by ITV with 23.6%.

Table 9 shows channel impact shares accumulated by the sales houses representing them – ITV dominates this list with a 29.9% share, followed by Channel 4 with an 18.8% share.

Most trend data in this report are confined to the period of the current BARB contract, but as before, some data are 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 2 2008

August 2008

TABLE 1

AVERAGE DAILY HOURS OF VIEWING - ALL TV

ALL INDIVIDUALS

		Qtr 1	Qtr 2	Qtr 3	Qtr 4	FULL YEAR
OLD PANEL	1991			3.41*	4.09	#
	1992	4.13	3.52	3.55	4.03	3.81
	1993	4.07	3.41	3.34	3.93	3.69
	1994	3.91	3.38	3.28	3.82	3.60
	1995	3.94	3.38	3.21	3.84	3.59
	1996	3.95	3.39	3.25	3.78	3.59
	1997	3.89	3.41	3.29	3.77	3.59
	1998	3.84	3.46	3.34	3.78	3.61
	1999	3.91	3.48	3.35	3.93	3.67
	2000	3.86	3.49	3.43	3.91	3.67
NEW PANEL	2001	3.95	3.46	3.34	3.75	3.62
	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
	2008	3.97	3.57			

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 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	
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

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:-									
06.04.08	22.4	7.4	18.0	7.4	0.6	5.1	60.9	39.1	100.0
13.04.08	21.1	7.5	19.0	7.8	0.6	5.3	61.3	38.7	100.0
20.04.08	21.7	7.3	18.4	7.7	0.6	5.4	61.2	38.8	100.0
27.04.08	21.5	7.7	19.2	7.5	0.6	5.4	62.0	38.0	100.0
04.05.08	21.7	8.6	18.4	7.9	0.7	5.1	62.4	37.6	100.0
11.05.08	21.5	7.6	19.7	6.9	0.6	4.8	61.2	38.8	100.0
18.05.08	23.3	7.4	18.0	7.6	0.7	5.2	62.3	37.7	100.0
25.05.08	20.8	7.6	20.3	7.3	0.6	4.9	61.5	38.5	100.0
01.06.08	20.3	8.0	21.9	6.7	0.6	4.3	61.8	38.2	100.0
08.06.08	21.3	7.8	17.8	8.9	0.8	4.9	61.5	38.5	100.0
15.06.08	21.5	8.4	17.9	8.7	0.8	4.9	62.2	37.8	100.0
22.06.08	21.4	8.3	19.0	8.2	0.7	5.1	62.8	37.2	100.0
29.06.08	24.0	7.8	16.3	8.2	0.7	4.9	61.9	38.1	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 29th JUNE 2008

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%
All Individuals	21.7	7.8	18.8	8.4	5.0	61.7	38.3	100.0
All Adults	22.7	8.2	19.4	8.6	5.2	64.0	36.0	100.0
Men	22.9	8.7	17.4	8.1	4.7	61.8	38.2	100.0
Women	22.6	7.7	21.0	9.1	5.5	65.8	34.2	100.0
Housewives	23.5	8.5	20.4	8.9	5.6	67.0	33.0	100.0
HW with children	16.9	4.8	17.2	8.7	4.9	52.4	47.6	100.0
16-34	15.4	5.2	14.6	10.0	4.5	49.7	50.3	100.0
35-54	20.6	6.9	18.4	8.7	5.0	59.6	40.4	100.0
55+	28.3	10.7	22.7	7.8	5.7	75.3	24.7	100.0
ABC1	24.5	9.0	16.8	8.6	4.4	63.3	36.7	100.0
C2DE	21.4	7.5	21.3	8.6	5.8	64.5	35.5	100.0
16-34 ABC1	17.8	6.3	14.0	10.3	4.2	52.6	47.4	100.0
35-54 ABC1	21.9	7.7	16.9	8.7	4.3	59.4	40.6	100.0
55+ ABC1	31.4	12.2	18.5	7.4	4.6	74.1	25.9	100.0
16-34 C2DE	13.3	4.3	15.1	9.7	4.7	47.2	52.8	100.0
35-54 C2DE	19.5	6.3	19.7	8.7	5.5	59.7	40.3	100.0
55+ C2DE	26.4	9.8	25.3	8.1	6.4	76.0	24.0	100.0
CHILDREN	11.9	4.4	12.5	6.3	3.5	38.7	61.3	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 29th JUNE 2008

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%
All Individuals	23.6	8.7	22.5	8.5	5.1	68.4	31.6	100.0
All Adults	24.2	9.1	22.9	8.5	5.2	69.9	30.2	100.0
Men	23.9	9.3	21.5	7.9	5.1	67.8	32.2	100.0
Women	24.4	8.9	23.9	9.0	5.3	71.5	28.5	100.0
Housewives	24.8	9.5	23.5	8.8	5.5	72.1	27.9	100.0
HW with children	20.5	5.5	20.3	10.7	4.8	61.7	38.3	100.0
16-34	18.3	5.9	17.4	11.6	4.5	57.8	42.2	100.0
35-54	22.4	7.9	21.2	9.1	5.2	65.9	34.1	100.0
55+	28.6	11.6	27.0	6.5	5.5	79.2	20.8	100.0
ABC1	26.2	10.3	19.3	9.0	4.5	69.4	30.6	100.0
C2DE	22.5	8.0	25.8	8.1	5.8	70.3	29.7	100.0
16-34 ABC1	20.4	7.3	16.0	11.9	4.2	59.8	40.2	100.0
35-54 ABC1	24.1	8.9	18.8	9.5	4.6	65.9	34.1	100.0
55+ ABC1	31.8	13.6	21.9	6.9	4.5	78.7	21.3	100.0
16-34 C2DE	16.3	4.7	18.8	11.4	4.7	55.9	44.1	100.0
35-54 C2DE	20.8	7.0	23.5	8.9	5.8	65.9	34.1	100.0
55+ C2DE	26.4	10.2	30.4	6.2	6.2	79.5	20.5	100.0
CHILDREN	17.0	4.0	18.8	8.5	3.9	52.3	47.7	100.0

TABLE 6

PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
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
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

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	Five		
	%	%	%	%	%	%	%
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
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

* 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>Virgin</i>		
			<i>Men & M</i>					<i>Living</i>		
								<i>Trouble</i>		
2006 - Qtr 2	34.9	65.1	22.9	12.7	5.7	7	3	2.0	1.4	10.4
2006 - Qtr 3	34	66.0	21.5	12.8	5.8	7.6	3.3	2.2	1.5	11.3
2006 - Qtr 4	34.25	65.8	23.7	11.04	6.05	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

** 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>				
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
2008 - Qtr 1	30.0	7.8	2.1	18.9	10.5	12.3	10.7	7.9
2008 - Qtr 2	28.9	8.3	2.3	18.8	10.4	12.5	10.5	8.4

** From Nov 2005

*** from Oct 2005

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	Zone Horror +1			UK Food
Sky Movies Active 1 - 8	Discovery Knowledge +1			UK Food+1
Diva	Military History			UK History
Zona Romantica				UK History+1
				UK Bright
				UK People
				UK People +1
				UK Style Leg
				All Setanta
				Virgin 1(+1)