

# United Kingdom

By January 2008, a total of 21.1m UK households had adopted multi-channel television. At year-end that figure had increased to 22.0m, leaving just 3.6m terrestrial-only homes still to be converted by the Government's 2012 deadline. The favoured domestic solution remained Freeview, the subscription-free DTT proposition, whose universe, including those homes additionally subscribing to services on other platforms, grew to 13.6m by year-end. Sky's Digital Satellite universe continued to grow, reaching 9.3m homes by December 2008, while Digital Cable transmissions were accessed in 3.5m households.

The Government's enforced digital switch-over programme, which had begun the previous October, continued on a phased basis, but at a low level, through 2008. This will now accelerate, region-by-region, until 2012, when the London area analogue signal will be switched off and digital signals effectively become universal. With larger households more likely to adopt at least one of these services, this meant that multi-channel television was already accessed by over 90% of the UK population in December 2008.

Increasing ownership levels of key durables and services also continued apace, with some significant levels reached. For instance, over 90% of the Adult population now own a mobile phone, while 73% of UK households possess a PC, virtually all of which are now Internet-enabled. DVD players are present in 77% of households, while over 30% now possess a TV set ready to receive transmissions in High Definition.

Hours of viewing continue to prove encouragingly resilient, with increases recorded amongst all key demographic groups, for both reach and viewership. Across 2008, more than 77% of adults watched television on any given day, for an average of just under five hours. More notable still was a marginal growth in viewership amongst those aged 16-34, a group widely believed to be watching significantly less television, as domestic Internet penetration rose above 76%.

The distribution of viewing generally continued the trend of previous years, with the terrestrial channels all losing share, but retaining much of this apparent loss through their own channel families. For instance, the Adult share of viewing for ITV's main channel fell from 19.9% in 2007 to 19.1% in 2008. However, their family share, including ITV2, ITV3 and ITV4, plus various other digital channels, only dropped from 23.9% to 23.8% over the same period. Comparable losses were recorded by the BBC and Channel 4 families. In fact, only the Five group of channels, rising from 6.15% to 6.24%, was able to demonstrate family channel Adult share growth. However, the major winners, once again, were the digital channels whose combined Adult share rose from 34.2% to 36.5%.

Although the public appetite for soaps and talent-based programming showed absolutely no sign of abating in

2008, the top audience, remarkably, was achieved by a cartoon: "Wallace and Gromit: A Matter of Loaf and Death" attracted an average audience in excess of 16.0m when it was slotted into the BBC1 Christmas Night schedule, between two episodes of perennial favourite "Eastenders". However, more indicative of general viewing trends was the fact that second and third places were filled by massive ITV1 successes – the respective Results Shows at the end of "Britain's Got Talent" and "The X Factor". BBC also contributed to this enormously successful genre with "Strictly Come Dancing", claiming fourth place.

Top soap audience in 2008 was achieved by ITV's "Coronation Street", ahead of "Eastenders" on BBC1. Largest sport audience was attracted, unsurprisingly, by the all-English Champions League final from Moscow in May. The clash between Chelsea and eventual winners Manchester United delivered an average ITV1 audience of just over 10m. Top movie audience was for a Christmas Week showing of "The Thirty-Nine Steps" on BBC1, but the ninth series of Channel 4's "Big Brother" continued the marked audience decline which has become increasingly pronounced over the last few years.

Leading advertising sectors, by spend, were little changed. Retail remained the heaviest-promoted category across all media, with TV taking an increased share of total expenditure, up to 43%. Finance, the second-largest TV category in 2007, dropped back to fourth, although the proportion allocated to television jumped to 45%. Entertainment and the Media filled second place (42% spent on TV), with Food rising from fourth to third, as advertisers within that category increased their proportion of spend on television from 57% to 68%.

The previous year's top five TV advertising companies remained unchanged in 2008, with only the rank order showing slight differences. Procter & Gamble continued to head the list, with 69% of all advertising expenditure placed on television. Unilever (59% spent on TV) remained in second place and Reckitt Benckiser in third, although the proportion of the latter's total promotional spend, allocated to television, increased sharply to 93%.

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## United Kingdom

General Data:	0
TV Landscape:	0
Viewing Patterns:	0
Audience Shares:	0
Top Programmes all Channels:	0
Top Programmes Channel by Channel:	0
Advertising:	0

# General Data

COUNTRY	
Land area (km <sup>2</sup> )	244 110
Total population	60 975 000 <sup>1</sup>
Number of households	26 447 000 <sup>2</sup>
Average household size	2.3

<sup>1</sup>Source: ONS (Mid 2007 estimate); <sup>2</sup>Source: Establishment Survey June 2008  
Source: ONS (Mid 2006 estimate)

ECONOMY	
GDP in million GBP (at current prices)	1 445 104
GDP per capita in GBP (at current prices)	23 700
GDP real growth rate in 2008 (in %)	0.7
Inflation rate in 2008 (in %)	3.6
Value of GBP in Euro (EUR)	1 EUR = 0.9525 GBP
Value of GBP in US-Dollar (USD)	1 USD = 1.4611 GBP

Source: ONS

HOUSEHOLD EQUIPMENT		
	Households in %	Individuals in %
Mobile telephone subscribers	88.8	90.2
PCs	73.2	78.3
Internet user	71.8	76.5 <sup>1</sup>
Broadband Internet access	57.3	63.0

<sup>1</sup>Adults 15+ who have used the Internet in the last 12 months  
Source: TGI 2009 Q1 (October 2007 - September 2008)

TV OVERVIEW	
Total number of TV households (TVHH)	25 778 000
In % of all households	97.5
TV licence-fee cost per year <sup>1</sup>	GBP 139.50/EUR 146.46

<sup>1</sup>Source: www.tvlicensing.co.uk  
Source: Establishment Survey June 2008

TV EQUIPMENT	
	in % of TVHH
Multiset (homes with more than 1 TV set)	62.2 <sup>1</sup>
VCR (Videotaperecorder)	48.0 <sup>1</sup>
DVD Player	77.4
DVD Recorder	18.3
PVR (Digital Videorecorder)	29.7
Teletext	90.2 <sup>2</sup>
TV Flat Screen	49.4 <sup>3</sup>
TV High Definition	30.2 <sup>3</sup>

<sup>1</sup>Source: Establishment Survey June 2008; <sup>2</sup>Data from 2007; <sup>3</sup>Source: TGI Q1 2009 (October 2007 - September 2008)  
Source: BARB Population Estimates (March 2009)

TV SUBSCRIPTION	
	in % of TVHH
Analogue Pay TV subscribers	0.5
Digital Pay TV subscribers	49.8

Source: BARB Population Estimates (March 2009)

TV DISTRIBUTION	
	in % of TVHH
Cable subscription (analogue + digital)	14.0
Satellite private dish/DTH (analogue + digital)	36.9
Satellite collective dish (analogue + digital)	0.2
Only analogue terrestrial	12.8

Source: BARB Population Estimates (March 2009)

DIGITAL TV	
	in % of TVHH
Digital Terrestrial	55.0
Digital Satellite	36.4
Digital Cable	13.3
IP TV (TV via DSL)	n.a.
Any Digital	86.7

Source: BARB Population Estimates (March 2009)

# TV Landscape

DOMESTIC PUBLIC CHANNELS							
Channel	Launch	Diff.	Tech.Pen. <sup>1</sup>	Language	Programming	Revenue	Sales House
BBC 1	1936	DT,T,C,S	99.5%	English	Generalist	L-F	None
BBC 2	1964	DT,T,C,S	98.8%	English	Generalist	L-F	None
BBC 3	1998	DT,C,S	77.1%	English	Generalist	L-F	None
BBC 4	2002	DT,C,S	62.7%	English	Arts	L-F	None
BBC NEWS 24	1998	DT,C,S	54.7%	English	News	L-F	None
BBC PARLIAMENT	1992	DT,C,S	10.1%	English	Politics	L-F	None
CBBC	2002	DT,C,S	40.6%	English	Older Children	L-F	None
CBEEBIES	2002	DT,C,S	38.6%	English	Younger Children	L-F	None
CHANNEL 4	1982	DT,T,C,S	98.5%	English	Generalist	Adv.	Channel 4
S4C	1983	DT,T,C,S	7.2%	English/Welsh	Generalist	Adv.	Optima
E4	2001	DT,C,S	70.1%	English	Generalist	Adv.	Channel 4
FILM 4	1998	DT,C,S	64.6%	English	Movies	Adv.	Channel 4
MORE 4	2005	DT,C,S	67.5%	English	Generalist	Adv.	Channel 4

<sup>1</sup>3+ minutes channel reach in homes from April 2007 to March 2008

Source: BARB/InfosysTV

DOMESTIC PRIVATE CHANNELS/FOREIGN CHANNELS WITH LOCAL AD WINDOW							
Channel	Launch	Diff.	Tech.Pen. <sup>1</sup>	Language	Programming	Revenue	Sales House
ITV 1	1955	DT,T,C,S	99.4%	English	Generalist	Adv.	ITV
GMTV	1993	DT,T,C,S	64.3%	English	Generalist	Adv.	GMTV
FIVE	1997	DT,T,C,S	92.7%	English	Generalist	Adv.	Five
ITV 2	1998	DT,C,S	79.3%	English	Generalist	Adv.	ITV
GMTV 2	1998	DT,C,S	17.5%	English	Generalist	Adv.	GMTV
ITV 3	2004	DT,C,S	68.8%	English	Generalist	Adv.	ITV
ITV 4	2005	DT,C,S	71.1%	English	Generalist	Adv.	ITV
FIVE USA	2006	DT,C,S	52.0%	English	Generalist	Adv.	Five
FIVER <sup>2</sup>	2006	DT,C,S	53.6%	English	Generalist	Adv.	Five

<sup>1</sup>3+ minutes channel reach in homes from April 2007 to March 2008; <sup>2</sup>Former name: Five Life

Source: BARB/InfosysTV

PREMIUM PAY TV CHANNELS							
Channel	Launch	Diff.	Tech. Pen. <sup>1</sup>	Language	Programming	Cost/Month	Revenue
SKY MOVIES PREMIERE	2007	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES PREMIERE +1	2007	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES CLASSICS	1999	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES FAMILY	1999	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES MODERN <sup>3</sup>	1999	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES INDIE	1999	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES SCI & HORROR	1999	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES ACTION & <sup>4</sup>	1993	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES DRAMA	1999	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES COMEDY	1990	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES SCREEN 1	2007	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
SKY MOVIES SCREEN 2	2007	C,S	18.1% <sup>2</sup>	English	Movies	n.a.	Sub., Adv.
DISNEY CINEMAGIC	2006	C,S	5.0% <sup>5</sup>	English	Movies	n.a.	Sub.
DISNEY CINEMAGIC +1	2006	C,S	5.0% <sup>5</sup>	English	Movies	n.a.	Sub.
SKY SPORTS 1	1993	C,S	17.0% <sup>6</sup>	English	Sports	n.a.	Sub., Adv.
SKY SPORTS 2	1994	C,S	17.0% <sup>6</sup>	English	Sports	n.a.	Sub., Adv.
SKY SPORTS 3	1996	C,S	17.0% <sup>6</sup>	English	Sports	n.a.	Sub., Adv.
SKY SPORTS XTRA	1999	C,S	17.0% <sup>6</sup>	English	Sports	n.a.	Sub., Adv.
SETANTA 1	2007	DT,C,S	10.6% <sup>7</sup>	English	Sports	n.a.	Sub., Adv.
SETANTA 2	2007	DT,C,S	10.6% <sup>7</sup>	English	Sports	n.a.	Sub., Adv.
SETANTA GOLF	2007	DT,C,S	10.6% <sup>7</sup>	English	Sports	n.a.	Sub., Adv.
SETANTA SPORTS NEWS	2007	DT,C,S	10.6% <sup>7</sup>	English	Sports	n.a.	Sub., Adv.

<sup>1</sup>In % of all viewers that tuned in for at least 3 minutes in December 2008; <sup>2</sup>In % of all homes (network panel) that tuned into any Sky Movies channel in December 2008; <sup>3</sup>GREATS; <sup>4</sup>THRILLER; <sup>5</sup>In % of all homes (network panel) that tuned into either Disney Cinemagic channel in December 2008; <sup>6</sup>In % of all homes (network panel) that tuned into any Sky Sports channel in December 2008; <sup>7</sup>In % of all homes (network panel) that tuned into any Setanta Sports channel in December 2008

Source: BARB, TNS, Company data

DIGITAL PACKAGES							
Channel	Launch	Diff.	Decoder	Subscr.	Language	No. of Ch.	Revenue
SKY DIGITAL	1998	S	Sky Digi-Box	9 238 000 <sup>1</sup>	English/Various	506 <sup>2</sup>	Sub., Adv.
FREESAT <sup>3</sup>	2008 <sup>4</sup>	S	Freesat Box/TV	597 000	English/Various	75 <sup>5</sup>	Adv.
VIRGIN MEDIA	1999	C	Cable Digi-Box	3 469 000 <sup>6</sup>	English/Various	203 <sup>7</sup>	Sub., Adv.
FREEVIEW	2002	T	Freeview Box/TV with <sup>8</sup>	13 556 000	English	48 <sup>5</sup>	L-F, Adv.
TOP-UP TV	2004	T	Freeview Decoder with <sup>9</sup>	400 000	English	<sup>10</sup>	Sub., Adv.
TISCALI TV	2007	ADSL	Tiscali Set Top Box	100 000 <sup>11</sup>	English	88 <sup>12</sup>	Sub., Adv.
BT VISION	2006	ADSL	BT Vision Digital <sup>13</sup>	376 000 <sup>14</sup>	English	<sup>15</sup>	Sub., Adv.

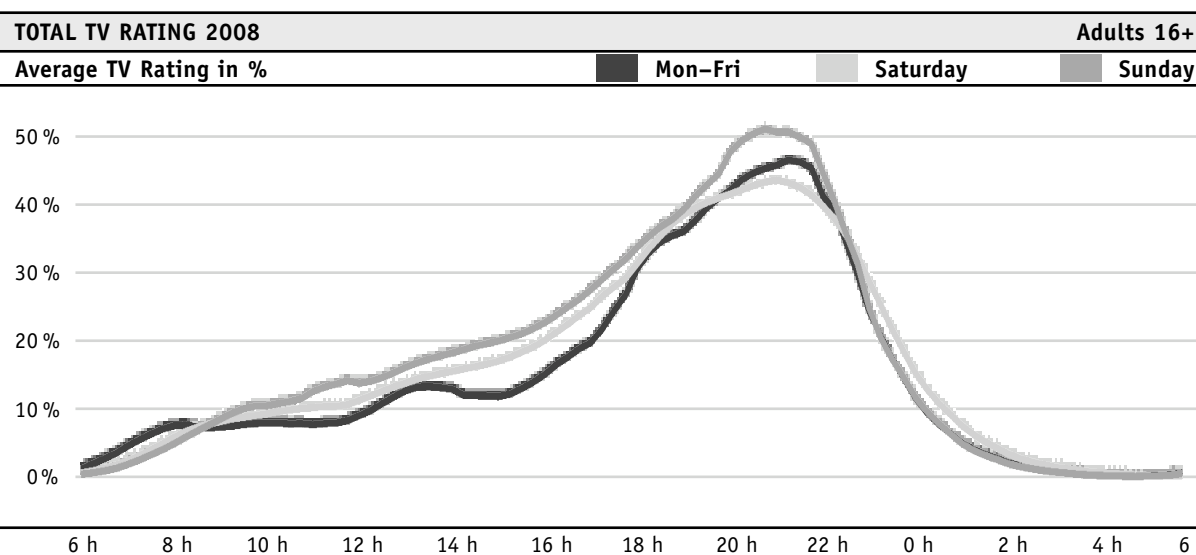
<sup>1</sup>Includes ROI; <sup>2</sup>Including HD channels + regional variations; <sup>3</sup>From Sky or BBC/ITV; <sup>4</sup>Launch date of BBC/ITV freesat service; <sup>5</sup>+ regional variations; <sup>6</sup>3 621 000 digital and analogue subscribers; <sup>7</sup>+ Video-on-Demand services; <sup>8</sup>built in decoder; <sup>9</sup>slot; <sup>10</sup>All freeview channels + selected content on demand from various channels; <sup>11</sup>Source: GKF Research in OFCOM report, rounded to nearest 100K; <sup>12</sup>+ Video-on-Demand content from selected channels; <sup>13</sup>Recorder Box; <sup>14</sup>As at Q3 2008; <sup>15</sup>All freeview channels + library of on-Demand content

Source: Company data, RSMB/BARB, OFCOM's "The Communications Market: Digital Progress Report" (Q4 2008)

# Viewing Patterns

AUDIENCE MEASUREMENT	
Main Contracting Party	BARB
Name of the Service and Institute:	AGB Nielsen Media Research, since 1980
Panel/Sampling Size (number of households)	5 100
Instrument used (people-meter, telephone, face-to-face)	People-meter
National audience measurement established in	1981
Launch of people-meter system	1981
Interval of measurement	1 min
Lower age limit	4
Panel Area/Population represented by the panel in %	100.0
<b>Population Size in 000</b>	
Individuals 4+	56 655
Adults 16+	47 985
Housewives 16+	25 739
Young Adults 16-34	14 309
Children 4-15	8 670

Source: BARB/Establishment Survey 2008



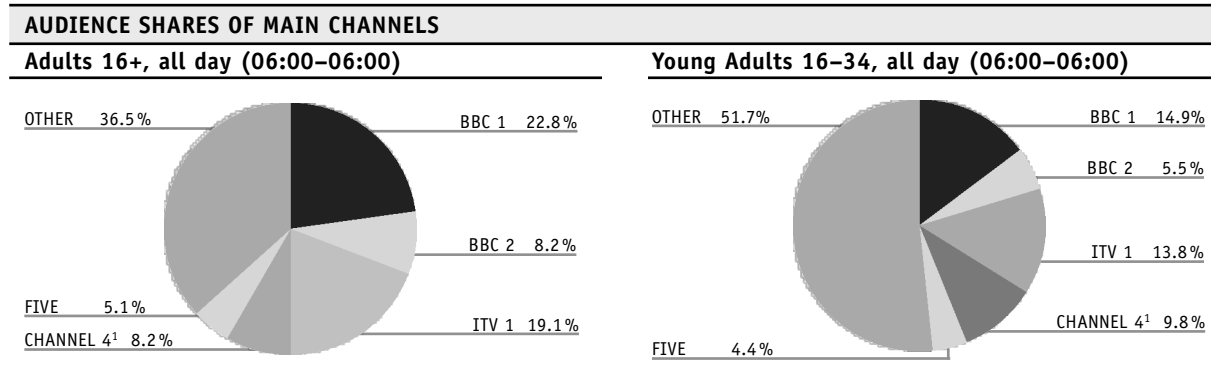
Source: BARB

DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)												
	Adults 16+			Children 4-15			Young Adults 16-34			Housewives 16+		
	2006	2007	2008	2006	2007	2008	2006	2007	2008	2006	2007	2008
Daily reach (in %) <sup>1</sup>	76.8	77.0	77.3	62.5	63.7	64.3	65.4	64.7	64.7	81.8	82.5	82.7
<b>Viewing time per Viewer</b>												
Mon-Sun	286	288	294	187	184	190	244	242	245	307	309	317
<b>Viewing time per Individual</b>												
Mon-Sun	232	233	240	132	134	139	180	176	179	264	268	277
Mon-Fri	225	227	233	121	123	126	172	168	170	261	266	273
Sat	241	242	251	164	167	176	191	188	194	263	267	279
Sun	258	257	268	158	157	165	207	202	208	280	283	296

<sup>1</sup>At least 3 minutes consecutively watching TV

Source: BARB InfosysTV

# Audience Shares



<sup>1</sup>Total, including Channel 4 +1

**AUDIENCE SHARES OF MAIN CHANNELS/ALL DAY 06:00–06:00 (IN %)**

Channel	Adults 16+		Young Adults 16–34		Children 4–15		Housewives 16+	
	2007	2008	2007	2008	2007	2008	2007	2008
BBC 1	22.9	22.8	16.0	14.9	13.7	11.9	23.7	23.5
BBC 2	8.8	8.2	6.1	5.5	5.8	4.7	9.1	8.4
ITV 1	19.9	19.1	14.5	13.8	12.6	12.5	21.4	20.3
CHANNEL 4 <sup>1</sup>	8.7	8.2	10.7	9.8	7.4	6.5	9.1	8.5
FIVE	5.3	5.1	4.7	4.4	3.7	3.6	5.6	5.5
OTHER	34.2	36.5	47.9	51.7	56.7	60.7	31.0	33.6

<sup>1</sup>Total, including Channel 4 +1

Source: BARB InfosysTV

**AUDIENCE SHARES OF MAIN CHANNELS/BY DAY PARTS (IN %)**

Channel	Adults 16+		Young Adults 16–34		Children 4–15		Housewives 16+	
	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time	Day Time	Prime Time
	06–18h	18–22:30h	06–18h	18–22:30h	06–18h	18–22:30h	06–18h	18–22:30h
BBC 1	22.7	24.7	13.1	17.5	8.7	16.0	23.4	25.4
BBC 2	7.5	9.2	4.1	6.8	4.9	4.7	7.7	9.3
ITV 1	16.7	23.5	12.4	17.3	7.4	19.4	18.3	24.6
CHANNEL 4 <sup>1</sup>	8.4	8.2	7.4	11.7	4.3	8.9	8.8	8.4
FIVE	5.0	5.1	4.4	4.5	3.2	3.9	5.5	5.2
OTHER	39.8	29.4	58.7	42.5	71.6	47.1	36.3	27.2

<sup>1</sup>Total, including Channel 4 +1

Source: BARB InfosysTV

## Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							Adults 16+	
Title	Land	Channel	Genre	Start. Time	Date	Ratings	Share	
WALLACE AND GROMIT IN <sup>1</sup>	UK	BBC 1	Cartoons	20:35	25/12	28.8%	53.3%	
BRITAIN'S GOT TALENT/DECISION <sup>2</sup>	UK	ITV 1	Reality Show	21:31	31/05	25.8%	55.0%	
THE X FACTOR/DECISION <sup>2</sup>	UK	ITV 1	Reality Show	21:45	13/12	25.5%	52.6%	
DANCING WITH THE STARS/FINAL <sup>3</sup>	UK	BBC 1	Variety Show	21:08	20/12	25.1%	51.3%	
CORONATION STREET	UK	ITV 1	Daily Soap	19:33	18/01	24.7%	52.1%	
THE X FACTOR/FINAL	UK	ITV 1	Reality Show	19:09	13/12	24.2%	48.0%	
DANCING ON ICE	UK	ITV 1	Variety Show	18:59	16/03	22.7%	44.5%	
DOCTOR WHO	UK	BBC 1	Series-Family	18:00	25/12	22.4%	49.8%	
EASTENDERS	UK	BBC 1	Daily Soap	19:59	24/03	22.1%	42.3%	
BRITAIN'S GOT TALENT	UK	ITV 1	Reality Show	21:01	30/05	21.8%	49.1%	
ANTIQUES ROADSHOW	UK	BBC 1	Magazine	19:14	16/11	20.2%	40.9%	
THE ROYLE FAMILY/CHRISTMAS <sup>4</sup>	UK	BBC 1	Series-Family	21:38	25/12	20.2%	42.0%	
FBAL CL MANCHESTER UNITED-CHELSEA <sup>2,5</sup>	UK	ITV 1	Sports	19:00	21/05	19.5%	43.3%	
NEW TRICKS	UK	BBC 1	Series-Crime	21:01	18/08	19.0%	37.5%	
LEWIS	UK	ITV 1	Series-Crime	21:04	24/02	18.2%	37.8%	
THE APPRENTICE	UK	BBC 1	Reality Show	20:59	11/06	18.1%	36.6%	
I'M A CELEBRITY – GET ME OUT <sup>6</sup>	UK	ITV 1	Reality Show	21:14	29/11	18.1%	38.4%	
CHILDREN IN NEED 2008	UK	BBC 1	Variety Show	19:00	14/11	17.7%	39.6%	
FBAL ENGLAND-SWITZERLAND <sup>5</sup>	UK	BBC 1	Sports	19:30	06/02	17.6%	35.2%	
TENNIS WIMBLEDON MURRAY-GASQUET	UK	BBC 1	Sports	20:30	30/06	17.6%	38.0%	

<sup>1</sup>A MATTER OF LOAF AND DEATH'; <sup>2</sup>FINAL; <sup>3</sup>British title: Strictly Come Dancing; <sup>4</sup>SPECIAL; <sup>5</sup>Includes pre- and post-match analysis; <sup>6</sup>OF HERE!  
Source: BARB

TOP 10 CINEMA MOVIES							Adults 16+	
Title	Land	Channel	Start. Time	Date	Ratings	Share		
THE THIRTY-NINE STEPS	UK	BBC 1	20:02	28/12	15.3%	28.5%		
INDIANA JONES III	USA	BBC 1	20:02	18/05	14.2%	30.0%		
WALLACE AND GROMIT IN 'THE <sup>1</sup>	UK	BBC 1	16:29	25/12	13.6%	40.0%		
HARRY POTTER IV	UK/USA	ITV 1	19:15	05/10	13.6%	27.1%		
PIRATES OF THE CARIBBEAN II	USA	BBC 1	20:33	26/12	13.0%	30.2%		
THE CHRONICLES OF NARNIA	USA/UK	BBC 1	17:49	26/12	11.8%	29.6%		
CALENDAR GIRLS	UK/USA	BBC 1	20:44	03/02	10.8%	21.1%		
CHARLIE AND THE CHOCOLATE <sup>2</sup>	USA/UK	ITV 1	19:05	29/03	10.6%	24.3%		
MISS POTTER	UK/USA	BBC 1	20:02	03/08	10.5%	22.9%		
INDIANA JONES II	USA	BBC 1	20:08	11/05	10.4%	22.5%		

<sup>1</sup>CURSE OF THE WERE-RABBIT'; <sup>2</sup>FACTORY  
Source: BARB

TOP 10 SPORT EVENTS <sup>1</sup>					Adults 16+	
Title	Channel	Start. Time	Date	Ratings	Share	
FBAL CL MANCHESTER UNITED–CHELSEA/FINAL	ITV 1	19:00	21/05	19.5 %	43.3 %	
FBAL ENGLAND–SWITZERLAND	BBC 1	19:30	06/02	17.6 %	35.2 %	
TENNIS WIMBLEDON MURRAY–GASQUET	BBC 1	20:30	30/06	17.6 %	38.0 %	
FORMULA 1 BRAZIL	ITV 1	16:05	02/11	17.4 %	43.1 %	
FBAL EU CHMP GERMANY–SPAIN/FINAL	BBC 1	18:55	29/06	17.0 %	36.5 %	
FBAL EU CHMP NETHERLANDS–RUSSIA	ITV 1	19:30	21/06	14.2 %	34.6 %	
FBAL W. CHMP (QUAL.) ENGLAND–KAZAKHSTAN	ITV 1	19:30	19/11	13.8 %	30.1 %	
FBAL MANCHESTER UNITED–ARSENAL	BBC 1	17:10	16/02	13.6 %	32.2 %	
FBAL EU CHMP PORTUGAL–GERMANY	ITV 1	19:30	19/06	13.4 %	31.2 %	
FBAL EU CHMP RUSSIA–SPAIN/SEMIFINAL	ITV 1	19:30	26/06	13.2 %	30.4 %	

<sup>1</sup>All football matches include pre- and post-match analysis

Source: BARB

TOP 10 SERIES						Adults 16+	
Title	Land	Genre	Runs	Channel	Start. Time	Ratings	Share
LEWIS	UK	Crime	4	ITV 1	21:00	17.5 %	36.7 %
EASTENDERS	UK	Daily Soap	210	BBC 1	19:30	15.5 %	36.4 %
WILD AT HEART	UK	Family	8	ITV 1	19:50	15.3 %	29.8 %
EMMERDALE	UK	Daily Soap	262	ITV 1	19:00	13.5 %	34.9 %
CASUALTY	UK	Family	47	BBC 1	20:20	12.5 %	28.0 %
DOCTOR WHO	UK	Family	17	BBC 1	18:20	12.2 %	34.0 %
NEW TRICKS	UK	Crime	29	BBC 1	21:00	11.8 %	24.7 %
TRIAL & RETRIBUTION	UK	Family	10	ITV 1	21:00	11.2 %	22.6 %
CORONATION STREET	UK	Daily Soap	292	ITV 1	20:30	11.1 %	35.7 %
ASHES TO ASHES	UK	Family	11	BBC 1	21:00	10.2 %	20.2 %

Source: BARB

# Top Programmes Channel by Channel

BBC 1							Adults 16+	
Top 10 Recurrent Programmes	Land	Genre	Runs	Start. Time	Length (m)	Ratings	Share	
DANCING WITH THE STARS <sup>1</sup>	UK	Variety Show	30	20:15	45	18.1%	39.1%	
EASTENDERS	UK	Daily Soap	210	19:30	30	15.5%	36.4%	
THE APPRENTICE	UK	Reality Show	12	21:00	60	14.3%	29.1%	
CASUALTY	UK	Series-Family	47	20:20	60	12.5%	28.0%	
DOCTOR WHO	UK	Series-Family	17	18:20	40	12.2%	34.0%	
NEW TRICKS	UK	Series-Crime	29	21:00	60	11.8%	24.7%	
I'D DO ANYTHING	UK	Variety Show	22	19:30	30	11.2%	27.7%	
THE ONE & ONLY	UK	Variety Show	14	18:30	120	10.4%	24.1%	
CELEBRITY MASTERMIND	UK	Quiz Show	8	19:00	30	10.3%	24.4%	
MOTORWAY COPS	UK	Documentary	5	21:00	60	10.2%	22.5%	

Top 10 Single Programmes	Land	Genre	Date	Start. Time	Length (m)	Ratings	Share
WALLACE AND GROMIT IN <sup>2</sup>	UK	Cartoons	25/12	20:35	30	28.8%	53.3%
THE ROYLE FAMILY/CHRISTMAS <sup>3</sup>	UK	Series-Family	25/12	21:38	60	20.2%	42.0%
CHILDREN IN NEED 2008	UK	Variety Show	14/11	19:00	180	17.7%	39.6%
FBAL ENGLAND-SWITZERLAND <sup>4</sup>		Sports	06/02	19:30	150	17.6%	35.2%
TENNIS WIMBLEDON MURRAY-GASQUET		Sports	30/06	20:30	60	17.6%	38.0%
FBAL EU CHMP GERMANY-SPAIN/FINAL <sup>4</sup>		Sports	29/06	18:55	195	17.0%	36.5%
THE THIRTY-NINE STEPS	UK	Movie	28/12	20:02	90	15.3%	28.5%
THE ROYAL VARIETY PERFORMANCE	UK	Variety Show	17/12	19:30	150	15.1%	32.4%
INDIANA JONES III	USA	Movie	18/05	20:02	120	14.2%	30.0%
EUROSONG/FINAL		Variety Show	24/05	20:00	195	13.7%	34.4%

<sup>1</sup> British title: Strictly Come Dancing; <sup>2</sup> 'A MATTER OF LOAF AND DEATH'; <sup>3</sup> SPECIAL; <sup>4</sup> Includes pre- and post-match analysis  
Source: BARB

BBC 2							Adults 16+	
Top 10 Recurrent Programmes	Land	Genre	Runs	Start. Time	Length (m)	Ratings	Share	
AUTUMNWATCH	UK	Documentary	8	20:00	60	6.4%	14.0%	
SPRINGWATCH	UK	Documentary	13	20:00	60	6.3%	14.7%	
MASTERCHEF	UK	Docu-Soap	34	20:30	30	6.3%	12.9%	
NIGELLA'S CHRISTMAS KITCHEN	UK	Cooking Show	5	20:30	30	6.0%	13.2%	
CRUFTS 2008	UK	Variety Show	5	20:00	60	5.9%	12.6%	
TOP GEAR	UK	Docu-Soap	47	20:00	60	5.8%	13.6%	
THE RHS CHELSEA FLOWER SHOW	UK	Variety Show	6	20:00	60	5.1%	12.7%	
THE WEAKEST LINK	UK	Quiz Show	32	17:15	45	5.0%	17.5%	
DANCING WITH THE STARS <sup>1,2</sup>	UK	Magazine	68	18:30	30	5.0%	13.3%	
THE BEST OF TOP GEAR	UK	Docu-Soap	7	20:00	60	4.8%	9.5%	

Top 10 Single Programmes	Land	Genre	Date	Start. Time	Length (m)	Ratings	Share
FBAL EU CHMP SWITZERLAND-TURKEY <sup>3</sup>		Sports	11/06	19:30	150	7.4%	16.3%
THE REAL ITALIAN JOB: JAMES <sup>4</sup>	UK	Documentary	28/12	21:15	60	7.1%	14.4%
WONDERLAND - THE SECRET LIFE <sup>5</sup>	UK	Documentary	18/01	21:50	40	6.6%	14.7%
DAD'S ARMY IN COLOUR	UK	Comedy Show	13/12	20:25	35	6.6%	12.8%
DON'T PANIC! THE DAD'S ARMY STORY	UK	Documentary	02/08	20:40	50	6.4%	16.3%
FILTH: THE MARY WHITEHOUSE STORY	UK	TV Movie	28/05	21:00	90	6.3%	13.1%
SHERLOCK HOLMES AND THE CASE <sup>6</sup>	UK	TV Movie	29/12	21:00	130	6.0%	13.2%
THE POLES ARE COMING!	UK	Documentary	11/03	21:00	60	5.5%	11.4%
JAMES MAY'S TOP TOYS	UK	Documentary	28/12	19:00	60	5.5%	12.5%
KINKY BOOTS	USA/UK	Movie	22/06	21:00	130	5.5%	11.3%

<sup>1</sup> British title: Strictly Come Dancing; <sup>2</sup> - IT TAKES TWO; <sup>3</sup> Includes pre- and post-match analysis; <sup>4</sup> MARTIN'S MILLE MIGLIA; <sup>5</sup> OF NORMAN WISDOM AGED 92 3/4; <sup>6</sup> OF THE SILK STOCKING  
Source: BARB

ITV 1							Adults 16+
Top 10 Recurrent Programmes	Land	Genre	Runs	Start. Time	Length (m)	Ratings	Share
LEWIS	UK	Series-Crime	4	21:00	90	17.5%	36.7%
I'M A CELEBRITY – GET ME OUT <sup>1</sup>	UK	Reality Show	18	20:30	90	16.1%	33.0%
WILD AT HEART	UK	Series-Family	8	19:50	40	15.3%	29.8%
EMMERDALE	UK	Daily Soap	262	19:00	30	13.5%	34.9%
ANT & DEC'S SATURDAY NIGHT <sup>2</sup>	UK	Variety Show	6	20:20	60	12.8%	29.6%
BRITAIN'S GOT TALENT	UK	Reality Show	23	20:00	60	12.6%	35.6%
THE X FACTOR/RESULTS	UK	Reality Show	19	21:40	70	11.8%	33.9%
TRIAL & RETRIBUTION	UK	Series-Family	10	21:00	60	11.2%	22.6%
CORONATION STREET	UK	Daily Soap	292	20:30	30	11.1%	35.7%
THE X FACTOR	UK	Reality Show	39	19:30	105	11.0%	33.9%

Top 10 Single Programmes	Land	Genre	Date	Start. Time	Length (m)	Ratings	Share
FBAL CL MANCHESTER UNITED-CHELSEA/FINAL <sup>3</sup>		Sports	21/05	19:00	240	19.5%	43.3%
FORMULA 1 BRAZIL		Sports	02/11	16:05	190	17.4%	43.1%
THE GIRLS ALOUD PARTY	UK	Variety Show	13/12	20:45	60	15.2%	30.0%
FLOOD	UK/ <sup>4</sup>	TV Movie	04/05	20:00	120	14.2%	30.2%
FBAL EU CHMP NETHERLANDS-RUSSIA <sup>3</sup>		Sports	21/06	19:30	180	14.2%	34.6%
WE ARE MOST AMUSED	UK	Variety Show	15/11	20:40	60	13.8%	32.1%
FBAL W. CHMP (QUAL.) ENGLAND-KAZAKHSTAN <sup>3</sup>		Sports	19/11	19:30	150	13.8%	30.1%
HARRY POTTER IV	UK/USA	Movie	05/10	19:15	165	13.6%	27.1%
FBAL EU CHMP PORTUGAL-GERMANY <sup>3</sup>		Sports	19/06	19:30	150	13.4%	31.2%
FBAL EU CHMP RUSSIA-SPAIN/SEMIFINAL <sup>3</sup>		Sports	26/06	19:30	150	13.2%	30.4%

<sup>1</sup>OF HERE!; <sup>2</sup>TAKEAWAY; <sup>3</sup>Includes pre- and post-match analysis; <sup>4</sup>South Africa/Canada  
Source: BARB

CHANNEL 4							Adults 16+
Top 10 Recurrent Programmes	Land	Genre	Runs	Start. Time	Length (m)	Ratings	Share
RAMSAY'S KITCHEN NIGHTMARES	UK	Docu-Soap	9	22:00	60	7.7%	19.9%
RELOCATION, RELOCATION	UK	Docu-Soap	13	20:00	60	6.8%	14.1%
GRAND DESIGNS	UK	Documentary	26	21:00	60	5.5%	11.9%
THE SECRET MILLIONAIRE	UK	Docu-Soap	16	21:00	60	5.4%	12.4%
COUNTRY HOUSE RESCUE	UK	Documentary	4	21:00	60	5.0%	10.6%
SUPERSIZE VS SUPERSKINNY	UK	Docu-Soap	8	20:00	60	4.8%	9.9%
HUGH'S CHICKEN RUN	UK	Documentary	6	21:00	60	4.5%	10.2%
HOW TO LOOK GOOD NAKED	UK	Docu-Soap	15	20:00	60	4.4%	9.7%
DEAL OR NO DEAL	UK	Game Show	290	16:15	45	4.3%	21.3%
10 YEARS YOUNGER	UK	Docu-Soap	12	20:00	60	4.1%	9.8%

Top 10 Single Programmes	Land	Genre	Date	Start. Time	Length (m)	Ratings	Share
PETER KAY'S BRITAIN'S GOT THE <sup>1</sup>	UK	Variety Show	12/10	20:00	60	11.0%	21.9%
ELF	USA/ <sup>2</sup>	Movie	14/12	18:20	100	9.0%	20.6%
MIRACLE ON 34 <sup>TH</sup> STREET	USA	Movie	07/12	18:20	120	7.3%	15.3%
PETER KAY: LIVE AT THE <sup>3</sup>	UK	Comedy Show	08/02	21:00	60	7.2%	15.4%
PETER KAY'S BRITAIN'S GOT THE <sup>4</sup>	UK	Variety Show	12/10	22:20	40	7.1%	16.6%
FANTASTIC FOUR	USA/ <sup>5</sup>	Movie	01/01	20:15	110	6.4%	12.0%
HALF TON MUM	UK/USA	Documentary	02/01	21:00	60	6.4%	12.4%
THE 9/11 FAKER	UK	Documentary	11/09	21:00	60	6.1%	13.7%
BIG BROTHER: CELEBRITY HIJACK/ <sup>6</sup>	UK	Reality Show	03/01	21:00	60	5.9%	12.2%
THE 9/11 HOTEL	UK	Documentary	10/09	21:00	60	5.8%	12.5%

<sup>1</sup>POP FACTOR; <sup>2</sup>Germany; <sup>3</sup>MANCHESTER ARENA; <sup>4</sup>POP FACTOR/FINAL; <sup>5</sup>Canada/Germany; <sup>6</sup>PREMIERE  
Source: BARB

FIVE							Adults 16+	
Top 10 Recurrent Programmes	Land	Genre	Runs	Start. Time	Length (m)	Ratings	Share	
CSI: MIAMI	USA	Series-Crime	45	21:00	60	4.3%	10.3%	
CSI	USA/ <sup>1</sup>	Series-Crime	51	21:00	60	4.2%	9.4%	
CSI: NY	USA/ <sup>1</sup>	Series-Crime	68	22:00	60	4.0%	10.1%	
NAVY NCIS	USA	Series-Crime	131	21:00	60	2.9%	6.6%	
PAUL MERTON IN INDIA	UK	Documentary	10	22:00	60	2.7%	6.4%	
EXTRAORDINARY PEOPLE	UK	Documentary	25	21:00	60	2.7%	5.8%	
SHARK	USA	Series-Crime	16	22:00	60	2.4%	6.2%	
LAW & ORDER: SPECIAL VICTIMS UNIT	USA	Series-Crime	76	22:00	60	2.4%	8.1%	
ICE ROAD TRUCKERS	USA	Documentary	42	20:00	60	2.2%	6.3%	
SECRETS OF EGYPT	UK	Documentary	7	20:00	60	1.9%	6.4%	

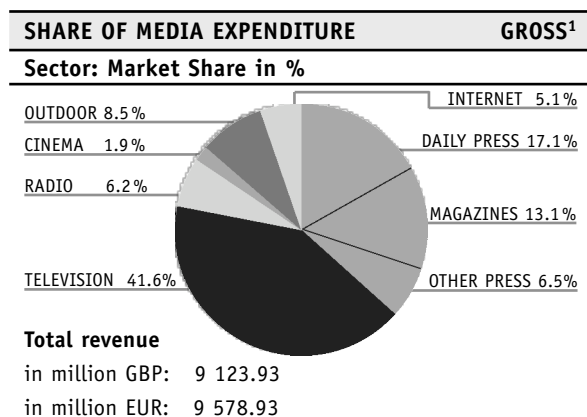
Top 10 Single Programmes	Land	Genre	Date	Start. Time	Length (m)	Ratings	Share
HELLBOY	USA	Movie	17/08	20:00	125	5.4%	11.3%
FBAL UEFA PSV EINDHOVEN-TOTTENHAM <sup>2</sup>		Sports	12/03	19:30	180	5.1%	10.9%
HOME ALONE	USA	Movie	07/12	17:10	110	5.0%	12.5%
BAD SANTA	USA/ <sup>3</sup>	Movie	11/12	21:00	110	4.2%	10.6%
MEN IN BLACK II	USA	Movie	13/01	19:25	90	4.1%	7.6%
MATILDA	USA	Movie	23/11	17:00	105	4.1%	10.5%
TERMINATOR III	USA/ <sup>4</sup>	Movie	09/03	21:00	110	4.0%	8.6%
FBAL UEFA SLAVIA PRAGUE-TOTTENHAM <sup>2</sup>		Sports	14/02	19:30	150	4.0%	8.3%
DIRTY DANCING	USA	Movie	19/10	21:00	110	4.0%	8.4%
TODAY YOU DIE	USA	Movie	17/02	21:00	90	3.9%	8.2%

<sup>1</sup>Canada; <sup>2</sup>Includes pre- and post-match analysis; <sup>3</sup>Germany; <sup>4</sup>Germany/UK  
Source: BARB

# Advertising

ADVERTISING EXPENDITURE	GROSS <sup>1</sup>
Total adspend (in million GBP)	9 123.93
Total adspend (in million EUR)	9 578.93
Total adspend (in million USD)	13 300.97
TV adspend (in million GBP)	3 799.20
TV adspend (in million EUR)	3 988.66
TV adspend (in million USD)	5 551.01
TV adspend in % of GDP	0.26
TV adspend per capita (EUR)	65.41

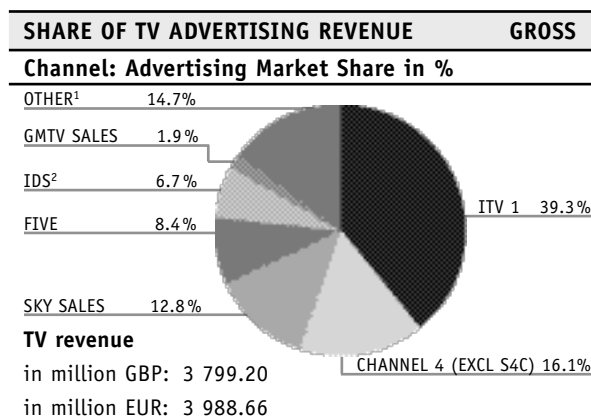
<sup>1</sup>Figures for TV are gross. The remaining media are neither gross nor net but estimates used as industry standard. Source: Nielsen Media Research



<sup>1</sup>Figures for TV are gross. The remaining media are neither gross nor net but estimates used as industry standard. Source: Nielsen Media Research

ADVERTISING STATISTICS	
Total number of spots broadcast <sup>1</sup>	39 192 051
Average spot length (in sec.)	25.7
Total number of advertisers	>32 600
Number of TV advertisers	3 520
Total number of advertised products	>32 600
Number of products advertised on TV	8 832

<sup>1</sup>For 266 stations  
Source: Nielsen Media Research



<sup>1</sup>Includes ITV's and Four's digital channels, i.e. ITV 2, ITV 3, CITV, E4, Film 4 & More 4; <sup>2</sup>Sales house of UK Gold, UK Style, Living TV, etc.; Source: Nielsen Media Research

TOP 10 TV ADVERTISING FIGURES	GROSS			
TV Advertising Sectors	Television <sup>1</sup>	6 Media <sup>2</sup>	Spent in TV	Share of TV Exp.
RETAIL	626.87	1 450.71	43.2 %	16.5 %
ENTERTAINMENT & MEDIA	445.39	1 067.50	41.7 %	11.7 %
FOOD	392.60	574.81	68.3 %	10.3 %
FINANCE	390.61	875.90	44.6 %	10.3 %
COSMETICS & TOILETRIES	334.74	574.81	58.2 %	8.8 %
MOTORS	286.80	739.04	38.8 %	7.5 %
HOUSEHOLD STORES	176.08	228.10	77.2 %	4.6 %
DRINK	166.48	328.46	50.7 %	4.4 %
PHARMACEUTICAL	159.30	246.35	64.7 %	4.2 %
GOVERNMENT, SOCIAL AND POLITICAL ORGANISATIONS	141.34	428.83	33.0 %	3.7 %
OTHER	678.99	2 609.44	26.0 %	18.0 %
<b>TV Advertisers</b>				
PROCTER&GAMBLE	126.52	183.73	68.9 %	3.3 %
UNILEVER	90.72	152.88	59.3 %	2.4 %
RECKITT BENCKISER	87.55	93.70	93.4 %	2.3 %
COI COMMUNICATIONS	71.71	188.71	38.0 %	1.9 %
KELLOGG'S	62.83	79.72	78.8 %	1.7 %
L'ORÉAL	50.19	76.85	65.3 %	1.3 %
NESTLÉ	38.26	64.42	59.4 %	1.0 %
DIRECT LINE	36.05	44.52	81.0 %	0.9 %
TESCO PLC	35.72	92.02	38.8 %	0.9 %
SAINSBURY'S SUPERMARKETS	35.48	62.78	56.5 %	0.9 %
OTHER	3 164.16	8 084.60	39.1 %	83.3 %
<b>Total (in million GBP)</b>	<b>3 799.20</b>	<b>9 123.93</b>	<b>41.6 %</b>	<b>100.0 %</b>
<b>Total (in million EUR)</b>	<b>3 988.66</b>	<b>9 578.93</b>	<b>41.6 %</b>	<b>100.0 %</b>

<sup>1</sup>Sponsoring is not included. <sup>2</sup>TV, Press, Radio, Outdoor, Cinema, Internet; Source: Nielsen Media Research