

United Kingdom

January 2007 began with 18.6 million multi-channel homes, representing 74% of all UK households. By the end of the year, those figures had increased to 20.6 million and 82% respectively, meaning that the remaining universe of analogue-only homes had fallen well below 5 million. The vast majority of the growth once again came through Freeview on the Digital Terrestrial platform, having overtaken Sky's Digital Satellite proposition around the end of 2006. By year-end, including homes subscribing to more than one platform, industry research provider BARB was reporting 11.2m DTT homes (44%), 8.8m DSat homes (34%) and 3.3m Digital Cable homes (13%).

So with less than 5m, presumably somewhat reluctant, homes now remaining to be converted before the analogue signal is finally turned off, the major issue must be to which system they will turn for digital broadcasting. At the present rate of uptake it would appear likely that Freeview will account for the lion's share of these residual homes. Enforced digital switch-over began in Whitehaven during October 2007 and will continue on a phased regional basis until 2012.

Television viewership again held up really well during 2007, despite regular press accusations to the contrary. 77% of all UK Adults watched television on any given day, for an average of 288 minutes each. Far from being in decline, both these measures were marginally ahead of their respective 2006 equivalent. Even Young Adults, reputed to be deserting the medium in droves, declined only from 65.4% to 64.7% in terms of daily reach, while those who viewed continued to do so for an average of just over four hours per day.

In line with the universe shift towards multi-channel television, viewing shares reflected a general drift away from terrestrial core channels and into either their own range extensions, or other digital stations. Unsurprisingly, all major channels lost all-time Adult share during 2007 - BBC1 and 2 from 32.8% to 31.7%, ITV1 from 20.3% to 19.9%, Channel 4 from 9.9% to 8.7% and Five from 5.9% to 5.3%. As a consequence, a combination of all non-terrestrial channels grew from 31.1% to 34.2%.

In a year during which the major international sporting tournament from a British perspective was the Rugby World Cup, the most significant broadcasting events saw further exploitation of the viewing public's seemingly endless appetite for reality and talent-search programming. Quite apart from Big Brother, which completed an unprecedented eighth series, shows such as "The X-Factor", "Strictly Come Dancing", "Britain's Got Talent" and "Dancing On Ice" all delivered audiences in excess of 10 million.

The largest single programme audience in 2007 was, entirely predictably, attracted by the Christmas Day episode of BBC's enduring Soap, "Eastenders". This reached an average audience of 14.4m viewers, re-

presenting a share of about 55% amongst those watching at the time. The next two places in the annual ranking, however, would have been far harder to forecast. Second place was filled by another BBC1 Christmas Day show, the science-fiction drama "Doctor Who" which registered a remarkable 13.3m viewers. And third place went to the year's largest Sports programme, the final of the Rugby World Cup between England and South Africa. Played on an October Saturday evening, this ITV1 broadcast attracted an average audience of 13.1m (52% share). This was the first time that rugby has provided the top sports audience of the year. That accolade invariably falls to football but in 2007 the largest football audience was the 11.2m (42%) who saw England's inglorious exit from the Euro 2008 qualification competition, losing to Croatia at Wembley in November. Sky Sports coverage of live football did, however, provide the only two 2007 programme audiences in excess of 2m on the multi-channel platform.

The six most heavily-promoted television advertising categories were unchanged in 2007, although the rank order amongst them altered markedly. Retail jumped from fourth place to first, increasing advertising spend year-on-year by 38%, with television accounting for 42% of category expenditure. The Finance sector also increased ad spend across 2007, rising by 13% whilst retaining second place in the TV ranking. Entertainment and the Media fell back from first place to fourth, but there was a significant 42% increase in promotional spend behind the Cosmetics and Toiletries category. Procter & Gamble remained the largest TV advertiser, allocating 71% of their total advertising expenditure to the medium. They were followed, as in 2006, by Unilever (56% spent on TV) and Reckitt Benckiser (55%). These three companies were responsible for a little over 8% of all television advertising.

Finally, Television remained the dominant advertising medium accounting for 41% of all spend, ahead of Press, marginally down at 37%. Magazines and Radio saw the greatest percentage losses, while the best proportional gains came from Outdoor and Internet advertising.

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United Kingdom

General Data:

TV Landscape:

Viewing Patterns:

Audience Shares:

Top Programmes all Channels:

Top Programmes Channel by Channel:

Advertising:

General Data

COUNTRY	
Land area (km ²)	244 110
Total population	60 587 000 ¹
Number of households	26 110 000 ²
Average household size	2.3

¹BARB Population Estimates (March 2008); ²Establishment Survey June 2007
Source: ONS (2 Mid 2006 estimate)

ECONOMY	
GDP in million GBP (at current prices)	1 384 823
GDP per capita in GBP (at current prices)	21 469
GDP real growth rate in 2007 (in %)	3.0
Inflation rate in 2007 (in %)	2.5
Value of GBP in Euro (EUR)	1 EUR = 0.7358 GBP
Value of GBP in US-Dollar (USD)	1 USD = 0.5039 GBP

Source: ONS (2 Mid 2006 estimate)

HOUSEHOLD EQUIPMENT		
	Households in %	Individuals in %
Mobile telephone subscribers	87.7	88.8
PCs	71.8	75.9
Internet user	68.7	73.6 ¹
Broadband Internet access	51.4	56.6

¹Adults 15+ who have used the Internet in the last 12 months
Source: TGI 2008 Q1 (October 2006 – September 2007)

TV OVERVIEW	
Total number of TV households (TVHH)	25 485 000
In % of all households	97.6
TV licence-fee cost per year	GBP 135.50/EUR 184.15

Source: Establishment Survey June 2007

TV EQUIPMENT	
	in % of TVHH
Multiset (homes with more than 1 TV set)	63.3
VCR (Videotaperecorder)	64.5
DVD Player	75.7
DVD Recorder	16.6
PVR (Digital Videorecorder)	18.1
Teletext	90.2

Source: Establishment Survey June 2007

TV DISTRIBUTION	
	in % of TVHH
Cable subscription (analogue + digital)	13.6
Satellite private dish/DTH (analogue + digital)	34.5
Satellite collective dish (analogue + digital)	0.2
Only analogue terrestrial	16.1

Source: BARB Population Estimates (March 2008)

DIGITAL TV	
	in % of TVHH
Digital Terrestrial	47.5
Digital Satellite	34.3
Digital Cable	12.8
IP TV (TV via DSL)	n.a.
Any Digital	83.2

Source: BARB Population Estimates (March 2008)

TV SUBSCRIPTION	
	in % of TVHH
Analogue Pay TV subscribers	0.6
Digital Pay TV subscribers	47.1

Source: BARB Population Estimates (March 2008)

TV Landscape

DOMESTIC PUBLIC CHANNELS							
Channel	Launch	Diff.	Tech.Pen. ¹	Language	Programming	Revenue	Sales House
BBC 1	1936	DT,T,S,C	100 %	English	Generalist	L-F	None
BBC 2	1964	DT,T,S,C	99 %	English	Generalist	L-F	None
BBC 3	1998	DT,S,C	77 %	English	Generalist	L-F	None
BBC 4	2002	DT,S,C	63 %	English	Arts	L-F	None
BBC NEWS 24	1998	DT,S,C	55 %	English	News	L-F	None
BBC PARLIAMENT	1992	DT,S,C	10 %	English	Politics	L-F	None
CBBC	2002	DT,S,C	41 %	English	Older Children	L-F	None
CBEEBIES	2002	DT,S,C	39 %	English	Younger Children	L-F	None
CHANNEL 4	1982	DT,T,S,C	98 %	English	Generalist	Adv.	In-house
S4C	1983	DT,T,S,C	7 %	English/Welsh	Generalist	Adv.	Optima
E4	2001	DT,S,C	70 %	English	Generalist	Adv.	Channel 4
FILM FOUR	1998	DT,S,C	65 %	English	Movies	Adv.	Channel 4
MORE 4	2005	DT,S,C	67 %	English	Generalist	Adv.	Channel 4

¹3+ minutes channel reach in homes from April 2006 to March 2007

Source: BARB/InfosysTV

DOMESTIC PRIVATE CHANNELS/FOREIGN CHANNELS WITH LOCAL AD WINDOW							
Channel	Launch	Diff.	Tech.Pen. ¹	Language	Programming	Revenue	Sales House
ITV 1	1955	DT,T,S,C	99 %	English	Generalist	Adv.	ITV
GMTV	1993	DT,T,S,C	64 %	English	Generalist	Adv.	In-house
FIVE	1997	DT,T,S,C	93 %	English	Generalist	Adv.	In-house
ITV 2	1998	DT,S,C	79 %	English	Generalist	Adv.	ITV
GMTV 2	1998	DT,S,C	17 %	English	Generalist	Adv.	GMTV
ITV 3	2004	DT,S,C	69 %	English	Generalist	Adv.	ITV
ITV 4	2005	DT,S,C	71 %	English	Generalist	Adv.	ITV
FIVE US	2006	DT,S,C	52 %	English	Generalist	Adv.	Five
FIVE LIFE	2006	DT,S,C	54 %	English	Generalist	Adv.	Five

¹3+ minutes channel reach in homes from April 2006 to March 2007

Source: BARB/InfosysTV

PAN EUROPEAN AND OTHER FOREIGN CHANNELS							
Channel	Nature	Diff.	Tech.Pen. ¹	Language	Programm.	Revenue	
EUROSPORT	Private	DT,S,C	22 %	English	Sports	Adv.	
SKY NEWS	Private	DT,S,C	39 %	English	News	Adv.	
MTV	Private	S,C	27 %	English	Music	Adv.	
CARTOON NETWORK	Private	DT,S,C	19 %	English	Cartoons	Adv.	
CNN	Private	S,C	n.a.	English	News	Adv.	

¹3+ minutes channel reach in homes from April 2006 to March 2007

Source: BARB/InfosysTV

PREMIUM PAY TV CHANNELS							
Channel	Launch	Diff.	Tech. Pen.	Language	Programming	Revenue	Sales H.
SKY MOVIES PREMIERE ¹	2007	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY MOVIES PREMIERE+1	2007	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY MOVIES CLASSICS	1999	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY MOVIES FAMILY	1999	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY MOVIES MODERN ³	1999	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY MOVIES INDIE	1999	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY MOVIES SCI & ⁴	1999	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY MOVIES ACTION & ⁵	1993	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY MOVIES DRAMA	1999	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY MOVIES COMEDY	1990	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
DISNEY CINEMAGIC	2006	C,S	4.4% ⁶	English	Movies	Sub., Adv.	Sky
DISNEY CINEMAGIC+ ¹	2006	C,S	4.4% ⁶	English	Movies	Sub., Adv.	Sky
SKY MOVIES SCREEN 1 ¹	2007	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY MOVIES SCREEN 2 ¹	2007	C,S	17.4% ²	English	Movies	Sub., Adv.	Sky
SKY SPORTS 1	1993	C,S	18.0% ⁷	English	Sports	Sub., Adv.	Sky
SKY SPORTS 2	1994	C,S	18.0% ⁷	English	Sports	Sub., Adv.	Sky
SKY SPORTS 3	1996	C,S	18.0% ⁷	English	Sports	Sub., Adv.	Sky
SKY SPORTS XTRA	1999	C,S	18.0% ⁷	English	Sports	Sub., Adv.	Sky

Note: Sky Movies channels were rebranded in 2007; launch dates are based on when first reported by BARB. ¹There are HD versions available of these channels. ²In % of all homes (network panel) that tuned into any Sky Movies channel in Dec. 2007; ³GREATS; ⁴HORROR; ⁵THRILLER; ⁶In % of all homes (network panel) that tuned into either Disney Cinemagic channel in Dec. 2007; ⁷In % of all homes (network panel) that tuned into any Sky Sports channel in Dec. 2007

Source: Sky.com, BARB, digitalspy.co.uk, TNS

DIGITAL PACKAGES								
Channel	Launch	Diff.	Decoder	Subscr.	Language	No. of Ch.	Reven.	Cost/Month
SKY DIGITAL	1998	S	Sky Digi-Box	8 297 000 ¹	English ²	480 ³	Sub., Adv.	£16-£45 ^{4,5}
VIRGIN MEDIA	1999	C	Cable Digi-Box	3 478 100 ⁶	English ²	201 ⁷	Sub., Adv.	free-£45.50 ^{4,5}
FREEVIEW	2002	T	Freeview Box/TV ⁸	11 191 000	English	46 ⁹	L-F, Adv.	None
TOP-UP TV	2004	T	Freeview Box with slot n.a.		English	10	Sub., Adv.	£9.99-£24.98 ¹¹
TISCALI TV ¹²	2007	ADLS	Tiscali Set Top Box	36 000 ¹³	English	14	Sub., Adv.	£15.99-£75.98 ¹⁵
BT VISION	2006	ADLS	BT Vision Digi.Rec.Box	150 000+	English	16	Sub., Adv.	free-£46.99 ¹⁷

¹Does not include ROI which is another 535 000 subscribers; ²+ some foreign language channels; ³+ regional variations; ⁴Cost is monthly for most basic package up to all standard channels + Sky Movies and Sport. Additional specialist channels (asian/sports(non-sky)/kids/adult), can be purchased at additional cost. ⁵Both sky and virgin media offer reduced package rates for customers choosing their other services as well (eg. Phone/broadband). ⁶Virgin have 3 253 100 digital cable subscribers and 224 600 analogue subscribers. ⁷+VOD services; ⁸With built in decoder; ⁹+regional variations; ¹⁰Selected content from 26 channels; ¹¹Cost is for basic package up to basic package + Setanta Sports + Picturebox. ¹²Former name: Homechoice (launching in 1992); ¹³As at Sept. 2007; ¹⁴Selected content from 82 channels (+ movies on demand); ¹⁵Requires subscription to Tiscali internet and phone (included in price); Adult channels can be purchased for an extra £15.99 a month. ¹⁶All 46 freeview channels and library of on demand content; ¹⁷Requires subscription to BT Broadband; As well as monthly payments all programmes available as pay per view from 29p (music video) to £2.99 (film) a programme

Source: www.sky.com (sky no of subscribers: 31st Dec. 07), www.virginmedia.com (virgin no of subscribers: 31st Dec. 07), www.freeview.co.uk, RSMB, universe figures, www.topuptv.com, www.tiscali.co.uk, www.digitalspy.co.uk, www.btplc.com

Viewing Patterns

AUDIENCE MEASUREMENT

Main Contracting Party	BARB
Name of the Service and Institute:	IPSOS RSL/RSMB/AGB Nielsen, since 1980
Panel/Sampling Size (number of households)	5 100
Instrument used (people-meter, telefon, 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

Population Size in 000

Individuals 4+	56 036
Adults 16+	47 309
Housewives 16+	25 319
Young Adults 16-34	14 096
Children 4-15	8 727

Source: BARB/Establishment Survey 2007

TOTAL TV RATING 2007

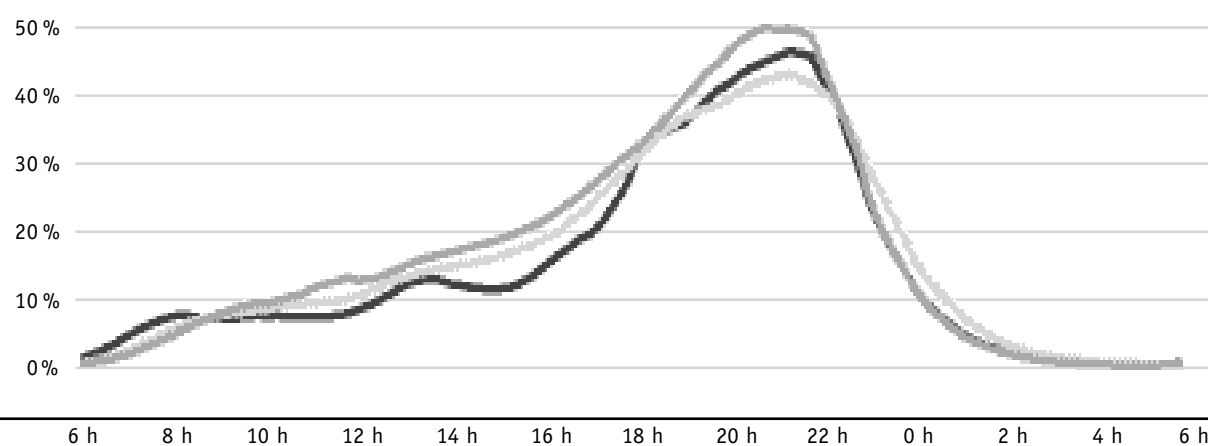
Adults 16+

Average TV Rating in %

Mon-Fri

Saturday

Sunday



Source: BARB

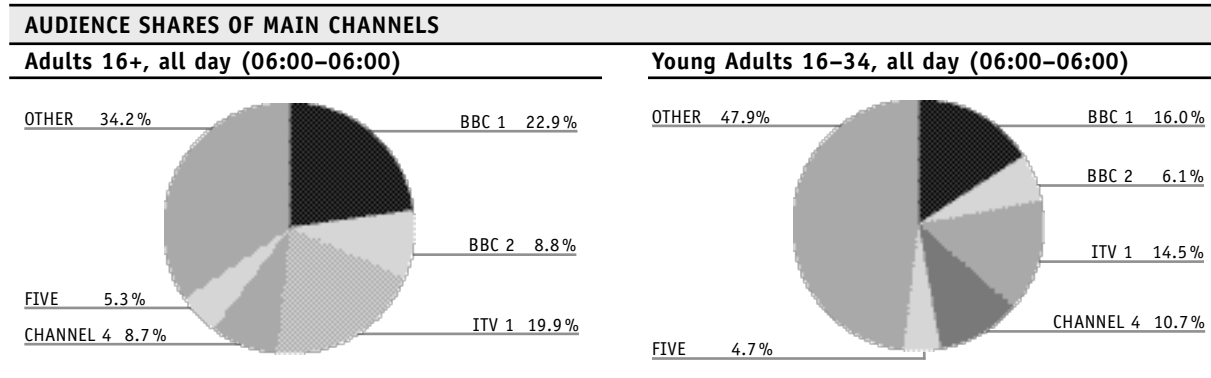
DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)

	Adults 16+			Children 4-15			Young Adults 16-34			Housewives 16+		
	2005	2006	2007	2005	2006	2007	2005	2006	2007	2005	2006	2007
Daily reach (in %) ¹	77.7	76.8	77.0	64.2	62.5	63.7	66.6	65.4	64.7	82.8	81.8	82.5
Viewing time per Viewer												
Mon-Sun	287	286	288	185	187	184	246	243	242	308	307	309
Viewing time per Individual												
Mon-Sun	235	232	233	135	132	134	185	179	176	269	264	268
Mon-Fri	229	225	227	125	121	123	177	172	168	267	261	266
Sat	245	241	242	166	164	167	198	191	188	268	263	267
Sun	257	258	257	154	158	157	211	207	202	280	280	283

¹At least 3 minutes consecutively watching TV

Source: BARB InfosysTV

Audience Shares



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

Channel	Adults 16+		Young Adults 16-34		Children 4-15		Housewives 16+	
	2006	2007	2006	2007	2006	2007	2006	2007
BBC 1	23.7	22.9	17.0	16.0	13.9	13.7	24.5	23.7
BBC 2	9.1	8.8	5.7	6.1	5.7	5.8	9.5	9.1
ITV 1	20.3	19.9	15.9	14.5	13.8	12.6	21.5	21.4
CHANNEL 4	9.9	8.7	12.5	10.7	8.0	7.4	10.3	9.1
FIVE	5.9	5.3	5.3	4.7	4.3	3.7	6.2	5.6
OTHER	31.1	34.2	43.5	47.9	54.2	56.7	28.0	31.0

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	22.9	24.5	15.1	18.0	10.7	17.3	23.8	25.3
BBC 2	8.7	9.5	5.0	7.3	6.5	5.2	8.9	9.7
ITV 1	16.9	25.0	13.3	18.1	7.4	19.5	18.7	26.3
CHANNEL 4	9.3	8.4	8.4	12.4	4.9	9.9	9.6	8.6
FIVE	4.8	5.3	3.6	5.3	3.1	4.1	5.2	5.5
OTHER	37.4	27.2	54.6	38.9	67.5	44.0	33.7	24.5

Source: BARB InfosysTV

Top Programmes all Channels

TOP 20 PROGRAMMES (ALL CATEGORIES)							Adults 16+	
Title	Land	Channel	Genre	Start. Time	Date	Ratings	Share	
EASTENDERS	UK	BBC 1	Daily Soap	20:03	25/12	25.8%	53.7%	
THE VICAR OF DIBLEY	UK	BBC 1	Series-Family	21:33	01/01	25.5%	45.3%	
CORONATION STREET	UK	ITV 1	Daily Soap	20:30	15/01	25.4%	49.4%	
RUGBY W. CUP ENGLAND-SOUTH AFRICA		ITV 1	Sports	19:29	20/10	24.8%	51.5%	
CONCERT FOR DIANA	UK	BBC 1	Variety Show	20:10	01/07	24.0%	48.0%	
DANCING WITH THE STARS ¹	UK	BBC 1	Variety Show	21:27	22/12	23.5%	46.9%	
DOCTOR WHO	UK	BBC 1	Series-Family	18:50	25/12	22.9%	49.1%	
THE X FACTOR/RESULTS	UK	ITV 1	Reality Show	21:36	15/12	22.7%	50.4%	
BRITAIN'S GOT TALENT	UK	ITV 1	Reality Show	22:06	17/06	22.3%	47.0%	
FBAL EU CHMP (QUAL.) ENGLAND-CROATIA		BBC 1	Sports	19:30	21/11	21.6%	42.1%	
THE X FACTOR	UK	ITV 1	Reality Show	19:14	15/12	21.3%	46.6%	
DOC MARTIN	UK	ITV 1	Series-Family	21:01	05/11	20.9%	41.3%	
TO THE MANOR BORN/SPECIAL	UK	BBC 1	Sitcom	21:35	25/12	20.2%	43.6%	
WAKING THE DEAD	UK	BBC 1	Series-Crime	21:01	07/01	19.5%	36.6%	
SIX O'CLOCK NEWS	UK	BBC 1	News	18:05	25/12	19.0%	50.9%	
NEW TRICKS	UK	BBC 1	Series-Crime	21:01	21/05	19.0%	40.4%	
DANCING ON ICE	UK	ITV 1	Variety Show	18:29	17/03	18.9%	45.1%	
BBC NEWS	UK	BBC 1	News	22:30	01/07	18.8%	47.8%	
EMMERDALE	UK	ITV 1	Daily Soap	19:02	08/01	18.4%	43.9%	
LEWIS	UK	ITV 1	Series-Crime	21:05	04/03	18.3%	38.8%	

¹ British title: Strictly come dancing

Source: BARB

TOP 10 CINEMA MOVIES							Adults 16+	
Title	Land	Channel	Start. Time	Date	Ratings	Share		
THE QUEEN	UK/France/Italy	ITV 1	21:05	02/09	17.7%	38.7%		
SHREK II	USA	BBC 1	16:41	25/12	16.3%	49.0%		
HARRY POTTER AND THE ¹	UK/USA	ITV 1	18:49	13/01	14.7%	32.9%		
INSTINCT	USA	ITV 1	21:00	26/02	12.7%	28.1%		
PIRATES OF THE CARIBBEAN: ²	USA	BBC 1	20:33	24/12	12.1%	26.5%		
SHREK	USA	BBC 1	19:15	10/02	11.3%	25.7%		
ICE AGE	USA	ITV 1	18:52	06/01	11.2%	26.2%		
BRIDGET JONES: THE EDGE OF ³	UK/France/Germany ⁴	ITV 1	21:04	31/01	11.1%	24.6%		
MEET THE FOCKERS	USA	BBC 1	20:30	28/12	11.0%	23.7%		
OCEAN'S ELEVEN	USA/Australia	ITV 1	21:02	28/05	10.3%	23.1%		

¹PRISONER OF AZKABAN; ²THE CURSE OF THE BLACK PEARL; ³REASON; ⁴Ireland/USA

Source: BARB

TOP 10 SPORT EVENTS					Adults 16+	
Title	Channel	Start. Time	Date	Ratings	Share	
RUGBY W. CUP ENGLAND-SOUTH AFRICA	ITV 1	19:29	20/10	24.8 %	51.5 %	
FBAL EU CHMP (QUAL.) ENGLAND-CROATIA	BBC 1	19:30	21/11	21.6 %	42.1 %	
FBAL CL LIVERPOOL-CHELSEA	ITV 1	19:30	01/05	18.2 %	40.3 %	
FBAL ENGLAND-BRAZIL	BBC 1	19:29	01/06	15.5 %	38.3 %	
FORMULA 1 BRAZIL	ITV 1	16:04	21/10	14.5 %	42.4 %	
RUGBY SIX NATIONS ITALY-FRANCE	BBC 1	16:54	03/02	14.1 %	42.9 %	
FBAL CL MANCHESTER UNT.-AS ROMA	ITV 1	19:29	02/10	10.6 %	23.5 %	
FORMULA 1 USA	ITV 1	17:02	17/06	10.5 %	33.5 %	
TENNIS WIMBLEDON/FINAL NADAL-FEDERER	BBC 1	13:30	08/07	9.6 %	37.5 %	
FORMULA 1 CANADA	ITV 1	17:01	10/06	9.3 %	32.1 %	

Source: BARB

TOP 10 SERIES					Adults 16+		
Title	Land	Genre	Runs	Channel	Start. Time	Ratings	Share
CORONATION STREET	UK	Daily Soap	263	ITV 1	19:34	19.1 %	44.7 %
DOC MARTIN	UK	Family	7	ITV 1	21:01	18.3 %	37.0 %
CRANFORD	UK	Family	5	BBC 1	20:59	15.9 %	28.3 %
WILD AT HEART	UK	Family	10	ITV 1	19:59	15.4 %	29.2 %
HEARTBEAT	UK	Family	19	ITV 1	19:59	15.3 %	31.4 %
LEWIS	UK	Crime	4	ITV 1	21:05	14.9 %	31.7 %
THE ROYAL	UK	Family	12	ITV 1	20:00	14.5 %	30.2 %
EMMERDALE	UK	Daily Soap	302	ITV 1	19:02	14.5 %	37.9 %
DOCTOR WHO	UK	Family	12	BBC 1	18:59	14.1 %	38.2 %
KINGDOM	UK	Family	6	ITV 1	21:02	13.5 %	27.9 %

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 ¹	UK	Variety Show	26	18:49	50	17.4%	39.9%	
CRANFORD	UK	Series-Family	5	20:59	60	15.9%	28.3%	
DOCTOR WHO	UK	Series-Family	12	18:59	45	14.1%	38.2%	
JUDGE JOHN DEED	UK	Series-Family	4	20:59	60	13.5%	26.4%	
FIVE DAYS	UK	Series-Family	5	21:00	60	13.2%	26.6%	
CASUALTY	UK	Series-Family	49	20:37	45	12.7%	28.7%	
MONARCHY: THE ROYAL FAMILY ²	UK	Documentary	5	20:59	60	12.4%	24.5%	
ANY DREAM WILL DO	UK	Reality Show	19	21:49	25	11.7%	29.9%	
SILENT WITNESS	UK	Series-Crime	13	21:00	60	11.6%	24.8%	
DALZIEL AND PASCOE	UK	Series-Crime	6	21:00	60	11.5%	24.4%	

Top 10 Single Programmes	Land	Genre	Date	Start. Time	Length (m)	Ratings	Share
CONCERT FOR DIANA II	UK	Variety Show	01/07	20:10	140	24.0%	48.0%
FBAL EU CHMP (QUAL.) ENGLAND-CROATIA		Sports	21/11	19:30	150	21.6%	42.1%
TO THE MANOR BORN/SPECIAL	UK	Sitcom	25/12	21:35	60	20.2%	43.6%
CONCERT FOR DIANA I	UK	Variety Show	01/07	15:30	270	17.5%	44.8%
EUROSONG		Variety Show	12/05	20:00	190	16.5%	38.6%
SHREK II	USA	Movie	25/12	16:41	100	16.3%	49.0%
FBAL ENGLAND-BRAZIL		Sports	01/06	19:29	150	15.5%	38.3%
THE DINNER PARTY	UK	TV Movie	09/09	21:00	60	14.7%	31.1%
RUGBY SIX NATIONS ITALY-FRANCE		Sports	03/02	16:54	50	14.1%	42.9%
BBC SPORTS PERSONALITY OF THE ³	UK	Variety Show	09/12	19:00	120	13.3%	26.1%

¹British title: Strictly come dancing; ²AT WORK; ³YEAR
Source: BARB

BBC 2							Adults 16+	
Top 10 Recurrent Programmes	Land	Genre	Runs	Start. Time	Length (m)	Ratings	Share	
TOP GEAR	UK	Docu-Soap	34	19:01	60	8.2%	17.7%	
SPRINGWATCH	UK	Documentary	13	20:01	60	7.1%	16.8%	
AUTUMNWATCH	UK	Documentary	8	20:01	60	7.1%	15.1%	
NIGELLA EXPRESS	UK	Cooking Show	13	20:32	60	6.0%	12.6%	
CRUFTS 2007	UK	Variety Show	5	20:02	60	6.0%	13.1%	
AN ISLAND PARISH	UK	Documentary	8	20:31	60	5.6%	11.2%	
THE RHS CHELSEA FLOWER SHOW	UK	Variety Show	6	20:01	60	5.5%	13.2%	
UNIVERSITY CHALLENGE	UK	Quiz Show	46	20:01	60	4.9%	11.0%	
MASTERCHEF GOES LARGE	UK	Docu-Soap	55	18:30	30	4.9%	12.6%	
DANCING WITH THE STARS ¹ -IT ²	UK	Variety Show	55	18:30	30	4.9%	12.9%	

Top 10 Single Programmes	Land	Genre	Date	Start. Time	Length (m)	Ratings	Share
TOP GEAR OF THE POPS	UK	Variety Show	16/03	21:59	30	12.2%	27.8%
RICHARD HAMMOND MEETS EVEL ³	UK	Documentary	23/12	21:02	60	8.1%	16.8%
THE RETURN OF 'ALLO 'ALLO!	UK	TV Movie	28/04	21:01	90	8.0%	18.6%
THIS LIFE TEN YEARS ON	UK	Documentary	02/01	21:00	80	7.3%	14.9%
LOUIS THEROUX - UNDER THE KNIFE	UK	Documentary	07/10	21:02	60	6.8%	13.6%
TOP GEAR - POLAR SPECIAL	UK	Docu-Soap	25/07	19:59	60	6.6%	14.8%
AN AUDIENCE WITH KEN DODD	UK	Variety Show	24/12	22:11	60	6.4%	15.5%
CAPTURING MARY	UK	TV Movie	12/11	21:02	80	6.4%	14.1%
BLACKADDER'S CHRISTMAS CAROL	UK	TV Movie	24/12	19:16	45	6.2%	13.6%
MAXWELL	UK	TV Movie	04/05	21:03	90	6.2%	14.4%

¹British title: Strictly come dancing; ²TAKES TWO; ³KNIEVEL; Source: BARB

ITV 1							Adults 16+
Top 10 Recurrent Programmes	Land	Genre	Runs	Start. Time	Length (m)	Ratings	Share
CORONATION STREET	UK	Daily Soap	263	19:34	30	19.1%	44.7%
DOC MARTIN	UK	Series-Family	7	21:01	60	18.3%	37.0%
WILD AT HEART	UK	Series-Family	10	19:59	60	15.4%	29.2%
HEARTBEAT	UK	Series-Family	19	19:59	60	15.3%	31.4%
LEWIS	UK	Series-Crime	4	21:05	60	14.9%	31.7%
THE ROYAL	UK	Series-Family	12	20:00	60	14.5%	30.2%
EMMERDALE	UK	Daily Soap	302	19:02	30	14.5%	37.9%
I'M A CELEBRITY – GET ME OUT ¹	UK	Reality Show	22	21:02	90	14.0%	29.0%
BRITAIN'S GOT TALENT	UK	Reality Show	11	21:00	90	13.9%	32.6%
KINGDOM	UK	Series-Family	6	21:02	60	13.5%	27.9%

Top 10 Single Programmes	Land	Genre	Date	Start. Time	Length (m)	Ratings	Share
RUGBY W. CUP ENGLAND–SOUTH AFRICA		Sports	20/10	19:29	165	24.8%	51.5%
FBAL CL LIVERPOOL–CHELSEA		Sports	01/05	19:30	180	18.2%	40.3%
THE QUEEN	UK/France/ ²	Movie	02/09	21:05	120	17.7%	38.7%
THE ROYAL VARIETY PERFORMANCE	UK	Variety Show	09/12	20:01	160	15.2%	27.9%
FORMULA 1 BRAZIL		Sports	21/10	16:04	180	14.5%	42.4%
THE NATIONAL TELEVISION AWARDS	UK	Variety Show	31/10	20:33	120	14.0%	30.8%
THE MIRROR PRIDE OF BRITAIN ³	UK	Variety Show	10/10	21:02	90	13.9%	30.5%
FALLEN ANGEL	UK	TV Movie	11/03	21:01	90	12.8%	27.9%
MANSFIELD PARK	UK	TV Movie	18/03	21:05	120	12.7%	29.4%
THE BRITISH SOAP AWARDS 2007	UK	Variety Show	30/05	20:03	120	12.3%	26.2%

¹OF HERE!; ²Italy; ³AWARDS
Source: BARB

CHANNEL 4							Adults 16+
Top 10 Recurrent Programmes	Land	Genre	Runs	Start. Time	Length (m)	Ratings	Share
RELOCATION, RELOCATION	UK	Docu-Soap	13	20:00	60	7.2%	15.2%
GRAND DESIGNS	UK	Documentary	19	21:00	60	6.8%	15.8%
JAMIE'S CHEF	UK	Docu-Soap	4	21:00	60	6.4%	13.7%
PROPERTY LADDER	UK	Docu-Soap	17	20:00	60	5.8%	13.0%
HOW TO LOOK GOOD NAKED	UK	Docu-Soap	14	20:00	60	5.6%	12.8%
EMBARRASSING ILLNESSES	UK	Documentary	8	20:30	30	5.3%	12.3%
RAMSAY'S KITCHEN NIGHTMARES	UK	Docu-Soap	16	21:00	60	5.1%	14.0%
GORDON RAMSEY'S F WORD	UK	Documentary	15	21:00	60	5.1%	14.6%
10 YEARS YOUNGER	UK	Docu-Soap	14	20:00	60	4.9%	11.0%
YOU ARE WHAT YOU EAT: ¹	UK	Docu-Soap	9	21:00	60	4.9%	10.5%

Top 10 Single Programmes	Land	Genre	Date	Start. Time	Length (m)	Ratings	Share
ELF	USA	Movie	02/12	17:49	90	8.7%	19.6%
THE DAY AFTER TOMORROW	USA	Movie	11/02	20:02	130	8.3%	15.3%
DIANA: THE WITNESSES IN ²	UK	Documentary	06/06	21:02	60	8.1%	17.4%
THE BIG FAT QUIZ OF THE YEAR	UK	Quiz Show	30/12	21:00	120	7.0%	15.5%
I, ROBOT	USA/Germany	Movie	04/03	21:02	120	6.9%	14.8%
ONE HUNDRED AND EIGHTY: THE ³	UK	Documentary	25/03	21:31	30	6.9%	15.4%
STRICTLY BABY BALLROOM	UK	Documentary	06/02	21:03	60	6.6%	13.3%
PETER KAY LIVE AT THE ⁴	UK	Comedy Show	25/03	22:31	60	6.2%	20.5%
CELEBRITY WIFE SWAP	UK	Docu-Soap	01/04	19:59	60	6.1%	12.8%
VERA DRAKE	UK/France ⁵	Movie	17/02	21:07	80	6.1%	15.0%

¹GILLIAN MOVES IN; ²THE TUNNEL; ³TOUR DOCUMENTARY; ⁴MANCHESTER ARENA ; ⁵New Zealand
Source: BARB

FIVE							Adults 16+	
Top 10 Recurrent Programmes	Land	Genre	Runs	Start. Time	Length (m)	Ratings	Share	
CSI: MIAMI	USA	Series-Crime	51	21:00	60	5.0%	11.7%	
CSI: NY	USA/Canada	Series-Crime	47	22:00	60	4.8%	12.2%	
PAUL MERTON IN CHINA	UK	Documentary	4	21:00	60	3.7%	7.8%	
SHARK	USA	Series-Crime	22	22:00	60	3.3%	8.8%	
NAVY NCIS	USA	Series-Crime	115	21:00	60	3.1%	7.1%	
EXTRAORDINARY PEOPLE	UK	Documentary	15	21:00	60	2.8%	5.9%	
BUILD A NEW LIFE: WAS IT ¹	UK	Documentary	4	21:00	60	2.8%	6.2%	
LAW AND ORDER	USA	Series-Crime	48	22:00	60	2.8%	7.6%	
LAW AND ORDER: SPECIAL VICTIMS ²	USA	Series-Crime	42	23:00	60	2.7%	9.9%	
LAW AND ORDER: CRIMINAL INTENT	USA	Series-Crime	52	22:00	60	2.6%	8.8%	

Top 10 Single Programmes	Land	Genre	Date	Start. Time	Length (m)	Ratings	Share
MATILDA	USA	Movie	18/11	17:01	105	5.9%	15.6%
DIRTY DANCING	USA	Movie	21/10	20:00	110	5.8%	11.9%
GHOST	USA	Movie	04/11	21:03	140	5.0%	12.4%
TERMINATOR III	USA	Movie	14/01	21:03	110	4.9%	10.8%
SPIDER-MAN II	USA	Movie	08/04	17:33	140	4.6%	14.6%
HELLBOY	USA	Movie	23/09	20:02	120	4.4%	9.1%
XXX II: THE NEXT LEVEL	USA	Movie	25/11	21:00	105	4.3%	8.9%
THE BELLY OF THE BEAST	USA	Movie	20/08	21:03	95	4.3%	10.2%
FBAL FC METALIST KHARKIV-EVERTON		Sports	04/10	19:31	150	4.2%	9.9%
S.W.A.T.	USA	Movie	14/10	21:00	125	4.1%	10.4%

¹WORTH IT?; ²UNIT
Source: BARB

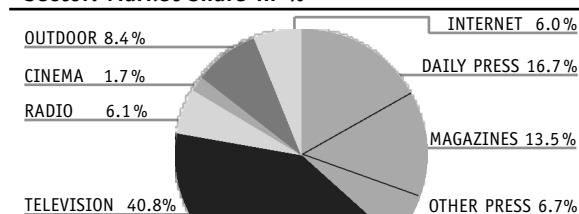
Advertising

ADVERTISING EXPENDITURE	GROSS ¹
Total adspend (in million GBP) ²	9 698.42
Total adspend (in million EUR)	13 180.15
Total adspend (in million USD)	19 243.02
TV adspend (in million GBP)	3 955.53
TV adspend (in million EUR)	5 375.56
TV adspend (in million USD)	7 848.33
TV adspend in % of GDP	0.29
TV adspend per capita (EUR)	88.72

¹Figures for TV are gross. The remaining media are neither gross nor net but estimates used as industry standard. ²Internet is included. Source: Nielsen Media Research

SHARE OF MEDIA EXPENDITURE	GROSS ¹
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Sector: Market Share in %



Total revenue

in million GBP: 9 698.42

in million EUR: 13 180.15

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

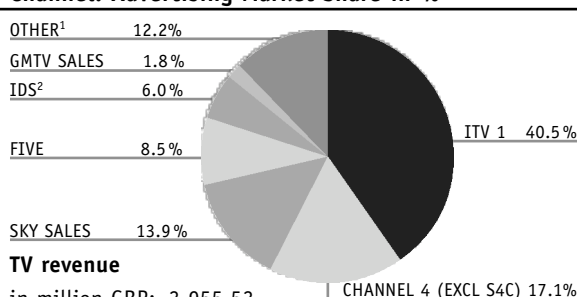
ADVERTISING STATISTICS	
Total number of spots broadcast ¹	32 038 372
Average spot length (in sec.)	26.3
Total number of advertisers	>32 600
Number of TV advertisers	3 380
Total number of advertised products	>32 600
Number of products advertised on TV	8 861

¹For 237 stations

Source: Nielsen Media Research

SHARE OF TV ADVERTISING REVENUE	GROSS
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Channel: Advertising Market Share in %



TV revenue

in million GBP: 3 955.53

in million EUR: 5 375.56

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

TOP 10 TV ADVERTISING FIGURES	GROSS			
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TV Advertising Sectors	Television ¹	6 Media ²	Spent in TV	Share of TV Exp.
RETAIL	463.05	1 093.45	42.3 %	11.7 %
FINANCE	456.27	1 157.84	39.4 %	11.5 %
ENTERTAINMENT & MEDIA	445.21	668.04	66.6 %	11.3 %
FOOD	356.63	622.11	57.3 %	9.0 %
COSMETICS & TOILETRIES	335.00	838.84	39.9 %	8.5 %
MOTORS	326.35	778.03	41.9 %	8.3 %
PHARMACEUTICAL	207.65	311.92	66.6 %	5.2 %
HOUSEHOLD STORES	197.40	258.14	76.5 %	5.0 %
DRINK	193.51	373.71	51.8 %	4.9 %
TELECOMMUNICATION	152.45	445.13	34.2 %	3.9 %
OTHER	822.02	3 151.22	26.1 %	20.8 %

TV Advertisers				
PROCTER&GAMBLE	145.66	204.91	71.1 %	3.7 %
UNILEVER UK	90.54	160.45	56.4 %	2.3 %
RECKITT BENCKISER	87.53	157.98	55.4 %	2.2 %
KELLOGGS CO OF GB	61.62	154.31	39.9 %	1.6 %
COI COMMUNICATIONS	54.34	98.43	55.2 %	1.4 %
NESTLE	48.67	93.78	51.9 %	1.2 %
LÓREAL PARIS	42.73	91.02	47.0 %	1.1 %
TESCO PLC	39.91	89.66	44.5 %	1.0 %
MARKS&SPENCER	36.98	83.64	44.2 %	0.9 %
VAUXHALL MOTORS	34.93	80.16	43.6 %	0.9 %
OTHER	3 312.61	8 484.08	39.0 %	83.7 %
Total (in million GBP)	3 955.53	9 698.42	40.8 %	100.0 %
Total (in million EUR)	5 375.56	13 180.15	40.8 %	100.0 %

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