

UK Television Market Survey 2010



The UK has well and truly embraced multi channel television at astonishing levels - over 90% of homes are now receiving such television services.

By January of 2009 22 million of the UK's 26 million homes had converted to multi channel television, be satellite, cable, or DTT. The last remaining terrestrial-only households will finish converting over by 2012 as the government enforced digital television switchover completes.

Ownership of technology, be it mobile phones, PC's, broadband internet, or TV's, are at similar levels to North America and consumption of services from such devices among the highest in the world.

Despite the multiple distraction, Britons are watching as much as ever with over 75% watching TV daily for an average of almost five hours.

Similar to in America, top programs are often talent-based competitions such as Pop Idol, Briton's Got Talent, and dancing with the Stars. The UK consumes more American content than any other European country, with many popular imports topping the viewership charts like CSI, 24, The Wire, and Big Love. Eight out of ten of the top watched feature movies on UK television were produced by American studios.

Besides a dip in the finance category, advertising's key sectors, retail, entertainment, and media advertising sectors showed some growth. P&G, as in the US, was the largest single advertiser followed by Unilever and Reckitt Benckiser.

Direct response television spending, although not recorded officially, still remains the fastest growing type of advertising across all television platforms.

Country Specific Data

THE UNITED KINGDOM (England, Wales, Scotland, Northern Ireland, and the Channel Islands)	
Total population	60 980 000
Number of households	26 430 000
Average household size	2.30
Total number of TV households (TVHH)	25 780 000
In % of all households	98.0
TV Universe	

ECONOMY	
GDP in million GBP (at current prices)	1 445 100
GDP per capita in GBP (at current prices)	24 000
GDP real growth rate in 2008 (in %)	0.7
Value of GBP in Euro (EUR)	1 EUR = 0.95 GBP
Value of GBP in US-Dollar (USD)	1 USD = 1.46 GBP
Inflation rate in 2008 (in %)	4.0

CONSUMER ELECTRONICS OWNERSHIP		
	<i>Households %</i>	<i>Individuals %</i>
Broadband Internet access	57.0	63.0
Internet user	72.0	77.0
Mobile telephone subscribers	89.0	90.2
PCs	73.0	78.0

TV Landscape

Channel	Launch	Diff.	Tech Reach	DRTV Formats
FIVE	1997	DT,T,C,S	93.00%	SF, LF
FIVER	2006	DT,C,S	54.00%	SF, LF
FIVE USA	2006	DT,C,S	52.00%	SF,LF
GMTV	1993	DT,T,C,S	64.00%	SF,LF
ITV	1955	DT,T,C,S	99.00%	SF

TV EQUIPMENT BREAKDOWN

	<i>in % of TVHH</i>
DVD Player	77.0
DVD Recorder	18.0
Multi TV Homes	62.0
PVR (Personal Video Recorder)	30.0
Teletext	90.0
TV Flat Screen	49.0
TV High Definition	30.0
VCR enabled	48.0

TV DISTRIBUTION BY PLATFORM

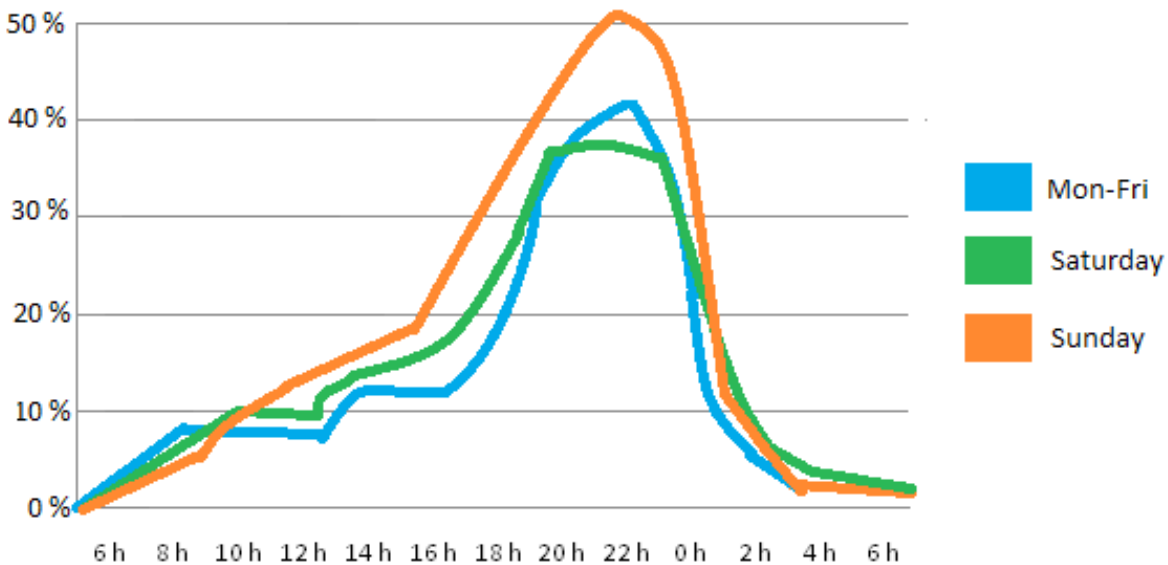
	<i>in % of TVHH</i>
Cumulative Digital	87.0
Digital Cable (Virgin Media)	13.0
Digital Satellite (Sky and FreeSat)	36.0
Digital Terrestrial (DTT)	55.0
IP TV (TV via DSL)	n.a.

Viewing Patterns

AUDIENCE MEASUREMENT	
Instrument used (people-meter, telephone, face-to-face)	People-meter
Interval of measurement	1 min
Launch of people-meter system	1981
Lower age limit	4
Main Contacting Party	BARB
Name of the Service and Institute: National audience measurement established in	AGB Nielsen Media Research, since 1980 1981
Panel/Sampling Size (number of households)	5 100
Panel Area/Population represented by the panel in %	100.0
	<i>Population Size in 000</i>
Individuals 4+	57 000
Adults 16+	48 000
Housewives 16+	26 000
Young Adults 16-34	14 000
Children 4-15	9 000

TOTAL TV RATING 2008

Average TV Rating in % Adults 16+



DAILY REACH AND DAILY VIEWING TIME (IN MINUTES)

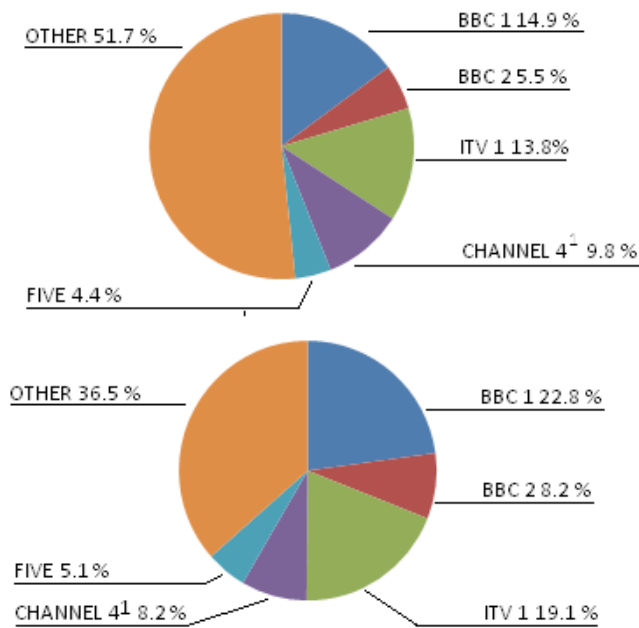
	Adults			Children			Young Adults			Housewives		
	2006	2007	2008	2006	2007	2008	2006	2007	2008	2006	2007	2008
Daily reach (in %)¹												
16+	77.0	77.0	77.0	63.0	64.0	64.0	65.0	65.0	65.0	82.0	83.0	83.0
4-15												
16-34												
16+												
Viewing time per Viewer												
Mon-Sun	290	290	290	190	180	190	240	240	250	300	300	320
Viewing time per Individual												
Mon-Sun	230	230	240	130	130	140	180	180	180	260	270	280
Mon-Fri	230	230	230	120	120	130	170	170	170	260	270	270
Sat	240	240	250	160	170	180	190	190	190	260	270	280
Sun	260	260	270	160	160	170	200	200	210	280	280	300

Audience Shares

AUDIENCE SHARES OF MAIN CHANNELS

Adults 16+, all day (06:00-06:00)

Young Adults 16-34, all day (06:00-06:00)



¹ 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	23.0	23.0	16.0	15.0	14.0	12.0	24.0	24.0
BBC 2	9.0	8.0	6.0	6.0	6.0	5.0	10.0	8.0
CHANNEL 4	9.0	8.0	11.0	10.0	7.0	7.0	9.0	9.0
FIVE	5.0	5.0	5.0	4.0	4.0	4.0	6.0	6.0
ITV 1	20.0	19.0	15.0	14.0	13.0	13.0	21.0	20.0
OTHER	34.0	37.0	48.0	52.0	57.0	61.0	31.0	34.0

Popular US/UK Channels

Broadcasters/Media Owners:

BBC
bSkyb
CBS Europe
Channel Four
Discovery Networks
Five
NBC Universal
Turner
Viacom
Virgin Media



Cable and Satellite Television

COUNTRY	Cable	Cable % R	Just Analogue Terrestrial	Sat	Sat %	TV Households
	<i>(in 000)</i>	<i>in %</i>	<i>in %</i>	<i>(in 000)</i>	<i>in %</i>	<i>(in 000)</i>
BELGIUM	4 500	95 %	2 %	3 930	8 %	4 740
CZECH REPUBLIC	920	23 %	51 %	630	16 %	3 960
DENMARK	710	29 %	n.a.	1 250	51 %	2 460
FRANCE	2 640	11 %	34 %	4 780	19 %	25 130
GERMANY	18 650	53 %	0 %	14 940	43 %	34 990
IRELAND	600	40 %	32 %	4 470	30 %	1 490
ITALY	1 400	1 %	64 %	4 880	21 %	23 110
NETHERLANDS	5 660	79 %	2 %	5 750	8 %	7 190
NORWAY	1 020	50 %	14 %	6 110	30 %	2 040
POLAND	4 820	36 %	46 %	2 860	21 %	13 540
PORTUGAL	1 590	45 %	51 %	210	6 %	3 490
SPAIN	1 720	11 %	62 %	3 260	21 %	15 820
SWEDEN	2 580	57 %	0 %	8 380	18 %	4 560
SWITZERLAND	2 470	79 %	5 %	3 390	11 %	3 140
TURKEY	1 350	8 %	42 %	8 860	53 %	16 690
UNITED KINGDOM	3 470	14 %	16 %	8 840	35 %	25 490
UNITED STATES	68 810	61 %	n.a.	30 460	27 %	112 800

DIGITAL TELEVISION PACKAGES

Channel	Launch	Diff.	Decoder	Subscriber	Language	No. of Channel	Revenue
BT VISION	2006	ADSL	BT Vision Digital	376 000	English	-	Sub., Adv.
FREESAT	2008	S	Freesat Box/TV	597 000	English	75	Adv.
FREEVIEW	2002	T	Freeview Box/TV with Sky	13 556 000	Various English	48	L-F, Adv.
SKY DIGITAL	1998	S	Digi-Box	9 238 000	English	506	Sub., Adv.
TISCALI TV	2007	ADSL	Tiscali Set Top Box	100 000	Various English	88	Sub., Adv.
TOP-UP TV	2004	T	Freeview Decoder with Cable	400 000	English	-	Sub., Adv.
VIRGIN MEDIA	1999	C	Digi-Box	3 469 000	English Various	203	Sub., Adv.

UK Multi-Channel Development 1992-2010 (Homes 000's)

Date	Satellite	Cable	DTT	Total
1992	1 900	410	-	2 300
1993	2 400	630	-	3 010
1994	2 800	740	-	3 490
1995	3 100	970	-	4 030
1996	3 500	1 400	-	4 940
1997	3 800	1 850	-	5 650
1998	4 100	2 480	-	6 590
1999	4 200	2 900	-	7 130
2000	4 000	3 350	300	7 620
2001	5 000	3 500	530	9 010
2002	6 000	3 800	790	10 320
2003	6 000	3 440	870	10 600
2004	7 000	3 280	2 080	12 040
2005	7 000	3 360	4 220	14 330
2006	8 000	3 300	6 360	16 820
2007	8 000	3 300	8 830	18 640
2008	9 000	3 410	12 020	21 280
2009	9 000	3 440	14 010	22 290
2010	10 000	3 660	16 880	23 830

European/US/UK Household Comparison Perspective

COUNTRY	AVG SIZE	BROADBAND	HOUSEH.	INTERNET USER	MOBILE	PC	POP.
BELGIUM	2.3	51 %	4 800	64 %	83 %	62 %	10 600
CZECH REPUBLIC	2.6	26 %	4 100	45 %	87 %	43 %	10 400
DENMARK	2.2	64 %	2 500	81 %	90 %	n.a.	5 500
FRANCE	2.5	43 %	25 800	51 %	81 %	57 %	64 100
GERMANY	2.1	49 %	39 800	51 %	104 %	70 %	82 300
GREECE	2.9	7 %	3 800	36 %	99 %	33 %	11 000
HUNGARY	2.5	24 %	4 000	37 %	86 %	41 %	10 000
IRELAND	2.8	25 %	1 500	49 %	116 %	57 %	4 300
ITALY	2.4	23 %	23 600	39 %	91 %	48 %	56 600
LITHUANIA	2.5	n.a.	1 400	49 %	139 %	42 %	3 400
NETHERLANDS	2.3	n.a.	7 200	76 %	n.a.	n.a.	16 400
NORWAY	2.3	71 %	2 100	83 %	97 %	76 %	4 700
POLAND	2.7	28 %	14 200	37 %	73 %	41 %	38 000
PORTUGAL	2.9	42 %	3 700	47 %	88 %	56 %	10 600
SPAIN	2.8	39 %	15 900	42 %	82 %	47 %	45 200
SWEDEN	2	83 %	4 600	81 %	99 %	72 %	9 200
SWITZERLAND	2.2	54 %	3 300	66 %	84 %	76 %	7 600
TURKEY	4.2	15 %	17 000	27 %	63 %	35 %	70 600
UKRAINE	2.7	n.a.	17 000	12 %	61 %	23 %	46 300
UNITED KINGDOM	2.3	51 %	26 000	74 %	89 %	72 %	60 600
JAPAN	2.5	68 %	52 000	69.00%	74 %	85 %	127 100
UNITED STATES	2.6	54 %	114 900	71.00%	76 %	78 %	304 700

TOP 10 CINEMA MOVIES						Adults 16+	
Title	Land	Channel	Start. Time	Date	Ratings	Share	
CALENDAR GIRLS	UK	BBC 1	20:44	03/02	11 %	21 %	
CHARLIE AND THE CHOCOLATE ²	USA	ITV 1	19:05	29/03	11 %	24 %	
HARRY POTTER IV	UK	ITV 1	19:15	05/10	14 %	27 %	
INDIANA JONES II	USA	BBC 1	20:08	11/05	10 %	23 %	
INDIANA JONES III	USA	BBC 1	20:02	18/05	14 %	30 %	
MISS POTTER	UK	BBC 1	20:02	03/08	11 %	23 %	
PIRATES OF THE CARIBBEAN II	USA	BBC 1	20:33	26/12	13 %	30 %	
THE CHRONICLES OF NARNIA	USA	BBC 1	17:49	26/12	12 %	30 %	
THE THIRTY-NINE STEPS	UK	BBC 1	20:02	28/12	15 %	29 %	
WALLACE AND GROMIT IN THE ¹	UK	BBC 1	16:29	25/12	14 %	40 %	

Notable DRTV Advertisers Active in the UK/Ireland





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