



LONDON LIVE

Monthly BARB Performance: May 2015



Summary

- ❖ London Live enjoyed a bumper month with record viewing as well as strong commercial performance.
- ❖ 2.5 million adults watched the channel in May, almost 200k more than in April despite total TV reach in London staying flat. A significant 72% of them were returning audience* while 52% are ABC1 adults.
- ❖ London Live ranked 21st in terms of audience reach, attracting more viewers than 5USA (2.3m), Sky News (2.3m), Watch (2.2m) and ITVBe (1.9m).
- ❖ May saw a new record with 0.36% share of viewing; surpassing the 0.34% target set for end of this fiscal year. This represents a 13% jump on April and +112% y-o-y, driven by strong bank holiday weekend performance and improved daytime viewing.
- ❖ Commercially, London Live celebrates a year-to-date best with 752tvr among adults (up 21% m-o-m), ranking 46th in the market place with 0.54% share.
- ❖ May's profile saw a shift towards male viewers with 57% profile, credited to the gangster-themed programmes.
- ❖ May's strong performance was partly driven by "Bad Boys Bank Holiday" featuring a number of gangster documentaries and films including May's top programmes – *The Notorious Kray Twins* and *Fall of The Essex Boys* (delivered 20% of monthly viewing to the channel with just 3% of the channel output). During that week, London Live also achieved its highest ever weekly reach of 1.1m adults (w/c 4th May).
- ❖ Ealing Studio also played a crucial role in this growth, the dedicated slot at weekday 2pm proved to be effective in boosting daytime viewing. Across the month, 260k adults have tuned in to watch the 2pm films; generating a 126% uplift in slot performance vs. previous 6 weeks average. Among trading audiences, the biggest improvement is from women ABC1 with average rating tripled in May vs previous 6 weeks.
- ❖ In terms of viewing by platforms, May saw a 20% rise in audience reach from Sky homes; helped by gangster programmes as well as Made In Chelsea and Da Ali G Show.



MARKETPLACE: Audience Reach

| # | Channel | Adults |
|----|-----------------------|--------------|
| 1 | BBC 1 | 8,677 |
| 2 | CH4 (Total) | 7,986 |
| 3 | ITV (Total) | 7,831 |
| 4 | BBC 2 | 7,209 |
| 5 | Channel 5 (Total) | 7,021 |
| 6 | ITV2 (Total) | 5,864 |
| 7 | BBC 3 | 4,781 |
| 8 | E4 (Total) | 4,618 |
| 9 | More4 (Total) | 4,354 |
| 10 | Film4 (Total) | 3,991 |
| 11 | Dave (Total) | 3,931 |
| 12 | BBC 4 | 3,749 |
| 13 | ITV4 (Total) | 3,628 |
| 14 | ITV3 (Total) | 3,344 |
| 15 | BBC News | 3,252 |
| 16 | Sky 1 (Total) | 2,883 |
| 17 | 5* (Total) | 2,879 |
| 18 | Pick (Total) | 2,869 |
| 19 | Sky Living (Total) | 2,633 |
| 20 | 4seven | 2,517 |
| 21 | London Live | 2,477 |
| 22 | ITV Breakfast (Total) | 2,351 |
| 23 | 5 USA (Total) | 2,334 |
| 24 | Sky News | 2,303 |
| 25 | Watch (Total) | 2,215 |
| 26 | Yesterday (Total) | 2,168 |
| 27 | ITV HD | 2,009 |
| 28 | Really | 1,993 |
| 29 | ITVBe (Total) | 1,963 |
| 30 | Quest (Total) | 1,903 |

| # | Channel | A ABC1 |
|----|------------------------|--------------|
| 1 | BBC 1 | 5,172 |
| 2 | CH4 (Total) | 4,746 |
| 3 | ITV (Total) | 4,536 |
| 4 | BBC 2 | 4,389 |
| 5 | Channel 5 (Total) | 3,995 |
| 6 | ITV2 (Total) | 3,172 |
| 7 | BBC 3 | 2,734 |
| 8 | E4 (Total) | 2,658 |
| 9 | More4 (Total) | 2,567 |
| 10 | BBC 4 | 2,420 |
| 11 | Dave (Total) | 2,146 |
| 12 | Film4 (Total) | 2,121 |
| 13 | BBC News | 2,072 |
| 14 | ITV4 (Total) | 1,923 |
| 15 | ITV3 (Total) | 1,837 |
| 16 | Sky 1 (Total) | 1,621 |
| 17 | Sky Living (Total) | 1,546 |
| 18 | Sky News | 1,486 |
| 19 | 4seven | 1,467 |
| 20 | 5* (Total) | 1,442 |
| 21 | Pick (Total) | 1,414 |
| 22 | London Live | 1,294 |
| 23 | Watch (Total) | 1,208 |
| 24 | ITV HD | 1,127 |
| 25 | 5 USA (Total) | 1,124 |
| 26 | Yesterday (Total) | 1,104 |
| 27 | Comedy Central (Total) | 1,100 |
| 28 | Sky Atlantic (Total) | 1,092 |
| 29 | ITVBe (Total) | 1,089 |
| 30 | Really | 1,087 |

- ❖ 2.5m adults watched London Live in May, 196k more than in April and 37% up Y-O-Y.
- ❖ Despite the increase, market ranking dropped from 19th to 21st; overtaking by 4Seven and Sky Living. The latter saw 30% increase in monthly reach boosted by new drama "*The Enfield Haunting*" as well as "*The Blacklist*".

**Audience reach for channels with time-shift (+1) option are combined and reported as Total*

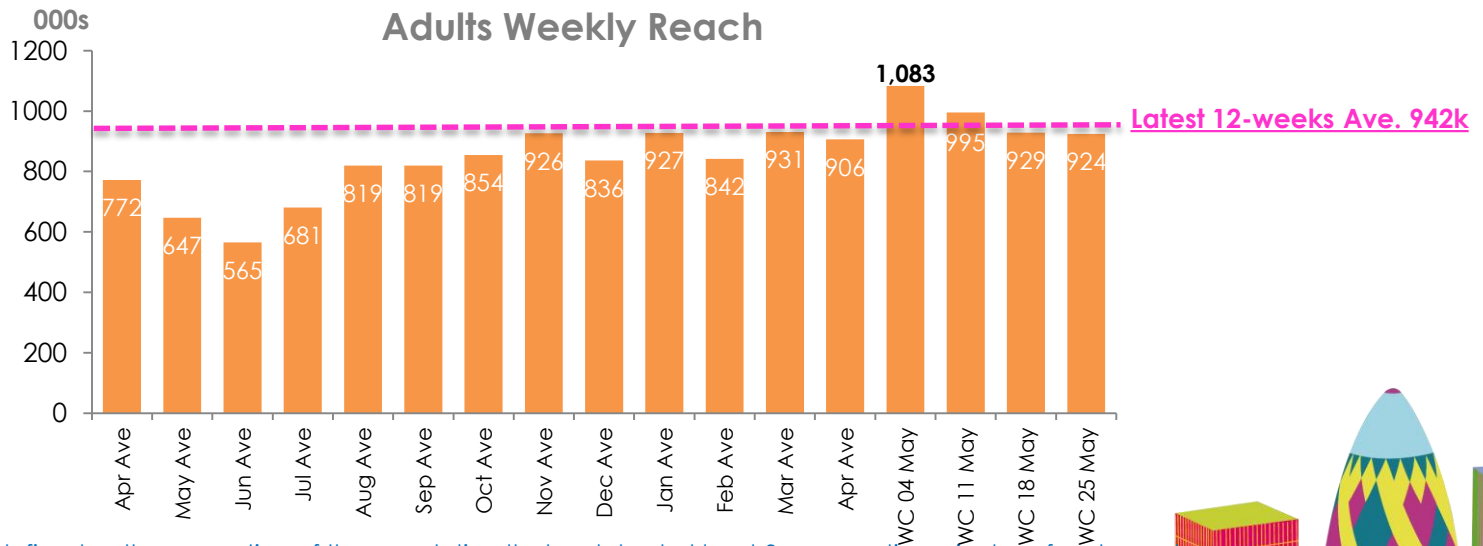
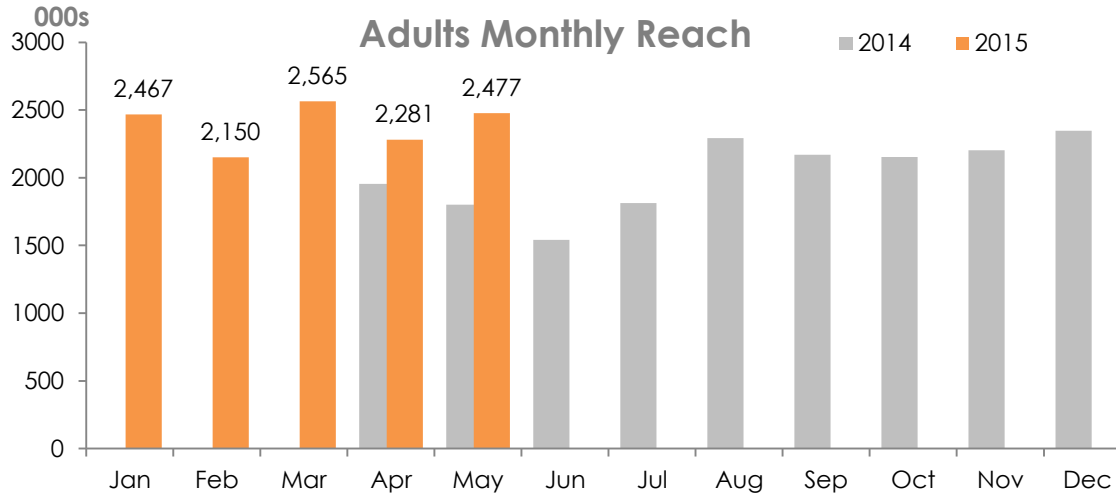


Source: BARB Consolidated data, ITV London region,
All Day/ 3min Reach 000s



2.5m Monthly Reach / 983k Weekly / 207k Daily Reach

Weekly reach hit new record with 1.1m adults watching on w/c 4th May; this is the 3rd time in 2015 London Live has achieved >1m weekly reach.



* Reach is defined as the proportion of the population that watched at least 3 consecutive minutes of a channel



Source: BARB/Techedge, ITV London region

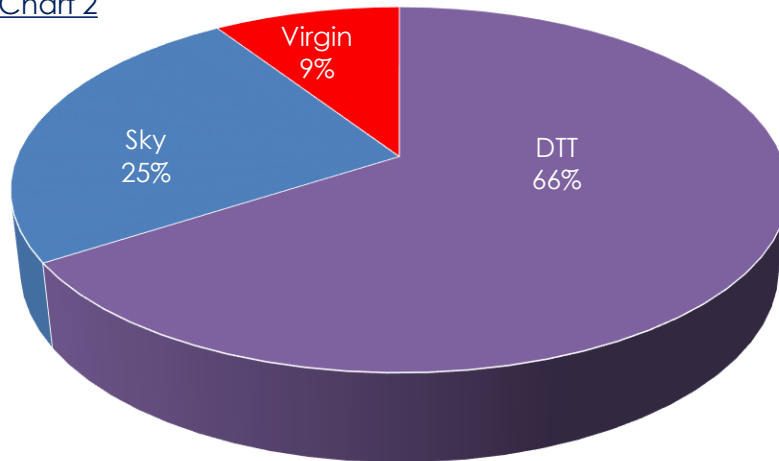


KPI – Viewing By Platform

Chart 1

| May KPI - Adults | Freeview | Sky | Virgin | YouView |
|----------------------|----------|------|--------|---------|
| % of London TV Homes | 69% | 41% | 19% | n/a |
| Average Audience | 3.0 | 1.2 | 0.5 | 0.3 |
| Share | 0.50 | 0.25 | 0.18 | 0.33 |
| Ave Mins (Viewers) | 37 | 37 | 41 | 33 |
| Monthly Reach (000s) | 1,277 | 765 | 232 | 158 |

Chart 2



Share of viewing by platform
(based on average audience)

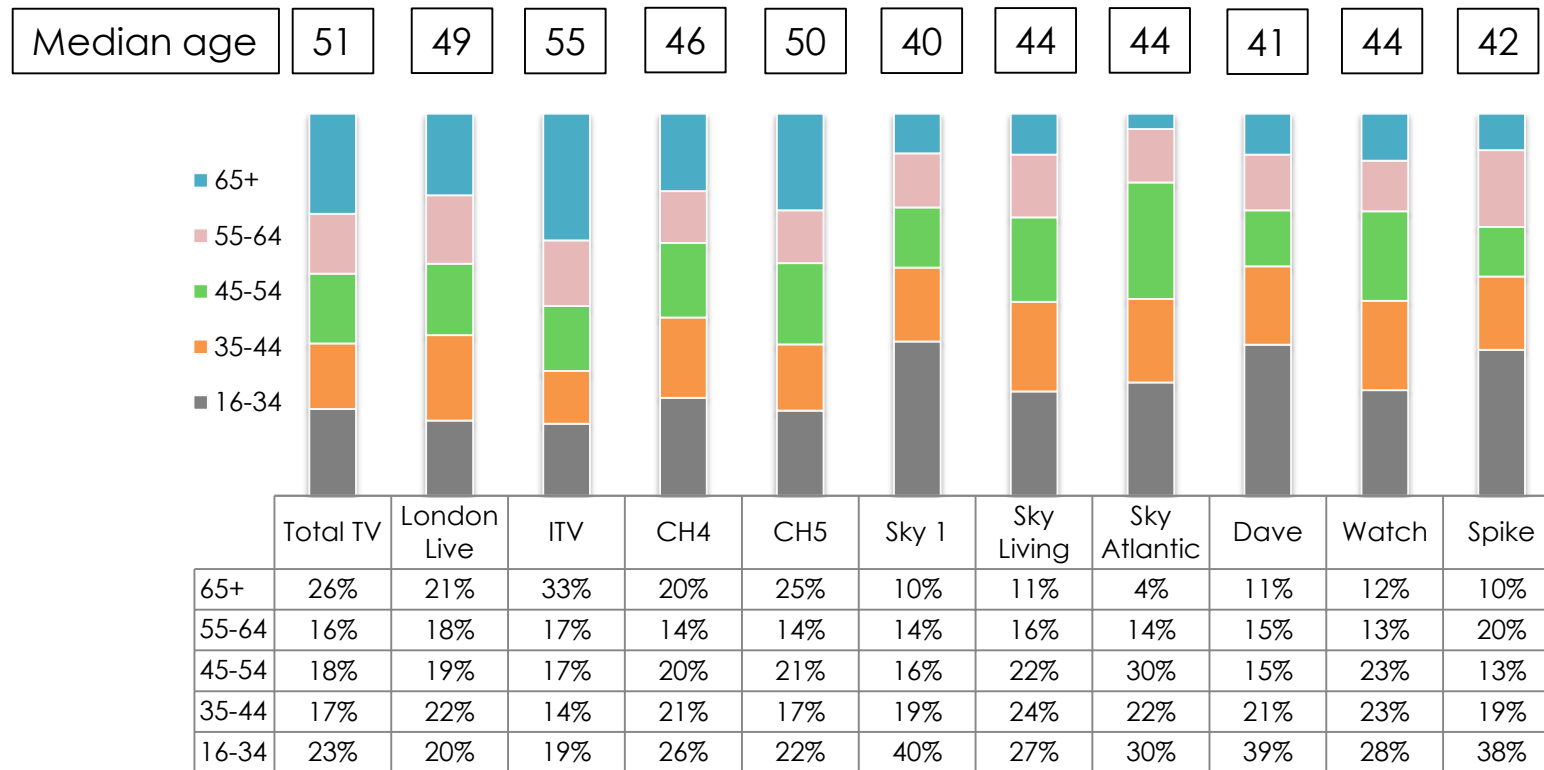
- ❖ Audience reach from Sky homes went up by 20% m-o-m, while share of viewing grew 39%; driven largely by London gangsters doc *The Notorious Kray Twins*, *Fall of the Essex Boys*, *Made In Chelsea* and *Da Ali G*.
- ❖ Reach from Freeview and Virgin Media homes has also increased but at a smaller scale.
- ❖ Although audience reach from Virgin Media homes remained low; share of its platform improved, driven by viewers watching longer (from 26min to 41min).



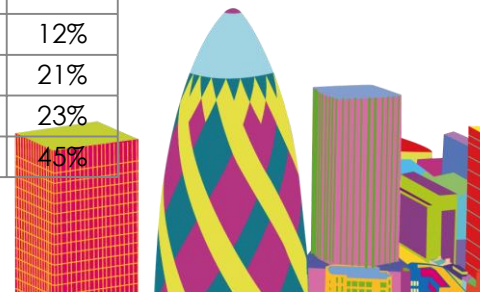
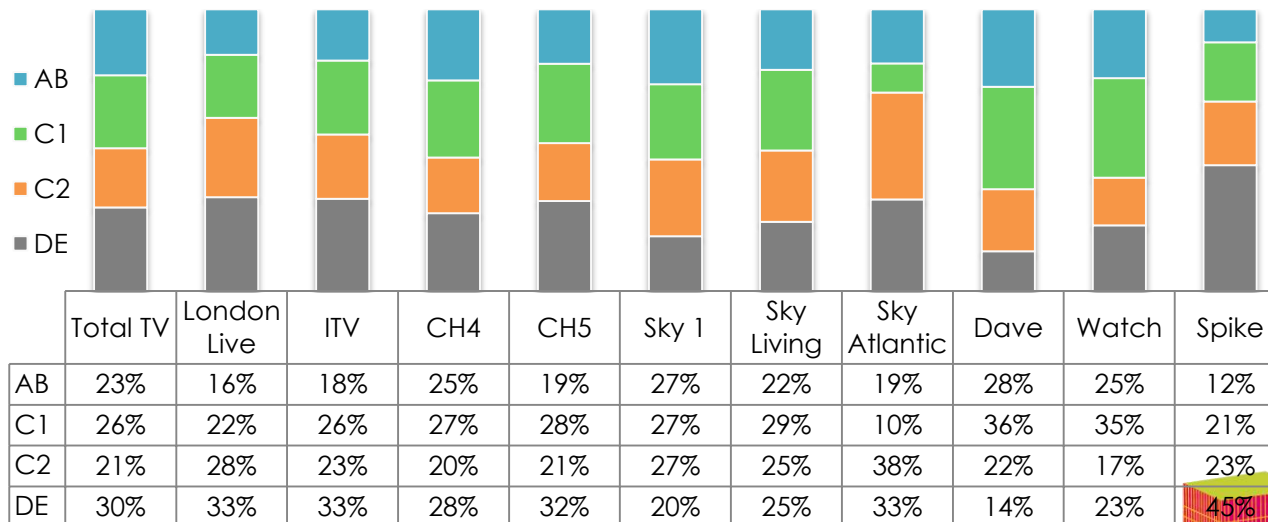
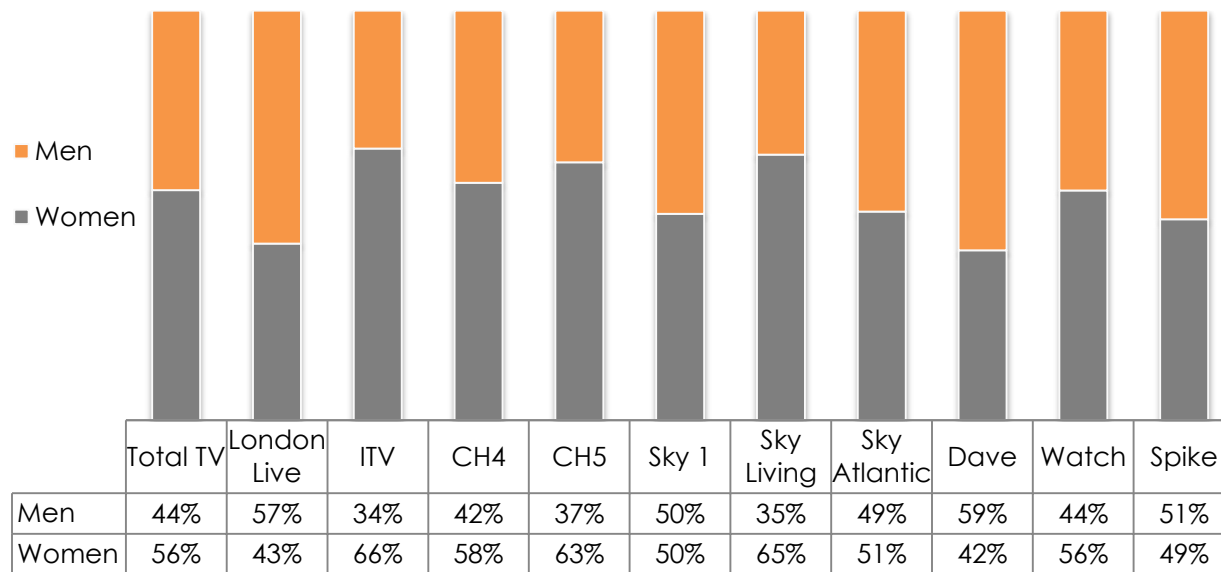
AUDIENCE PROFILE



London Live's viewer age profile is in line with market average while slightly older than competitive entertainment channels.



London Live saw a shift in viewer profile towards male and C2DE class, driven by the “Bad Boys Bank Holiday” stunt.



COMMERCIAL

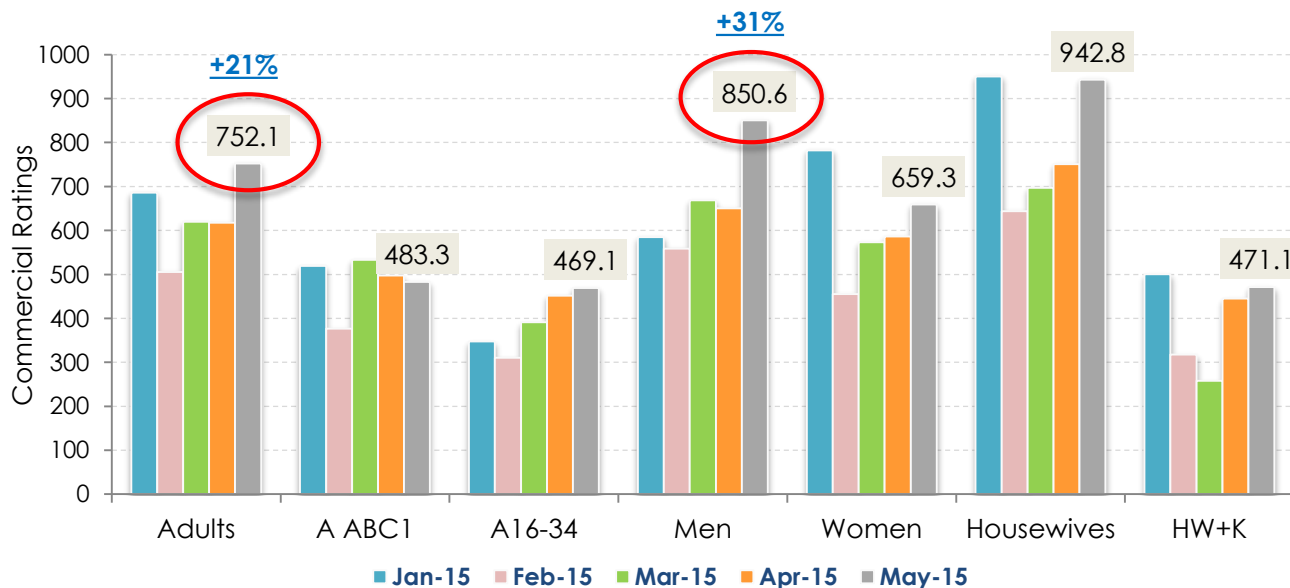


London Live achieved its strongest commercial performance in May with 752 ratings; taking 0.54% market share.

Films and gangster documentaries such as *The Notorious Kray Twins* and *Ealing Studio* classics were among the key drivers behind the positive results.

Demographically, ratings among men showed the biggest growth among key targets, up 31%.

Monthly Impact Among Key Demographics



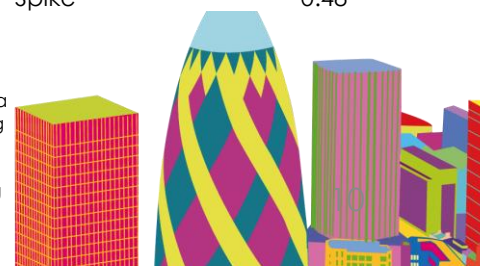
| Rank | Channel | Share of Impact |
|------|--------------------|-----------------|
| 1 | ITV | 15.3 |
| 2 | CH4 | 7.0 |
| 3 | Channel 5 | 5.3 |
| 4 | ITV3 | 3.9 |
| 5 | ITV2 | 2.9 |
| 6 | ITV HD | 2.4 |
| 7 | E4 | 2.3 |
| 8 | Dave | 2.1 |
| 9 | Film4 | 1.61 |
| 10 | More4 | 1.58 |
| 11 | Sky News | 1.57 |
| 12 | 5 USA | 1.48 |
| 14 | ITV4 | 1.44 |
| 15 | Sky 1 | 1.39 |
| 17 | Drama | 1.23 |
| 18 | Pick | 1.17 |
| 21 | Sky Living | 1.10 |
| 24 | Sky Sports 1 | 1.03 |
| 25 | Quest | 0.97 |
| 27 | ITVBe | 0.93 |
| 28 | Yesterday | 0.92 |
| 31 | True Entertainment | 0.84 |
| 32 | Comedy Central | 0.81 |
| 35 | CBS Reality | 0.74 |
| 36 | CBS Action | 0.69 |
| 37 | Really | 0.68 |
| 38 | Watch | 0.66 |
| 39 | 5* | 0.65 |
| 42 | Discovery | 0.56 |
| 43 | FOX | 0.56 |
| 46 | London Live | 0.54 |
| 47 | Food Network | 0.52 |
| 48 | Universal | 0.49 |
| 49 | Spike | 0.48 |

Impacts (R/W): 30sec weighted impacts

"One impact is equivalent to one person viewing one 30-second spot on one occasion. A total of 10 impacts could be achieved in a number of ways: by ten people viewing a single commercial; by one person seeing the commercial ten times; by five people seeing the commercial twice and so on."

TVR (R/W): 30sec weighted ratings

One TVR is numerically equivalent to one per cent of a target audience. Commercial campaigns are frequently assessed by adding the TVRs of their individual spots to produce a gross rating point total

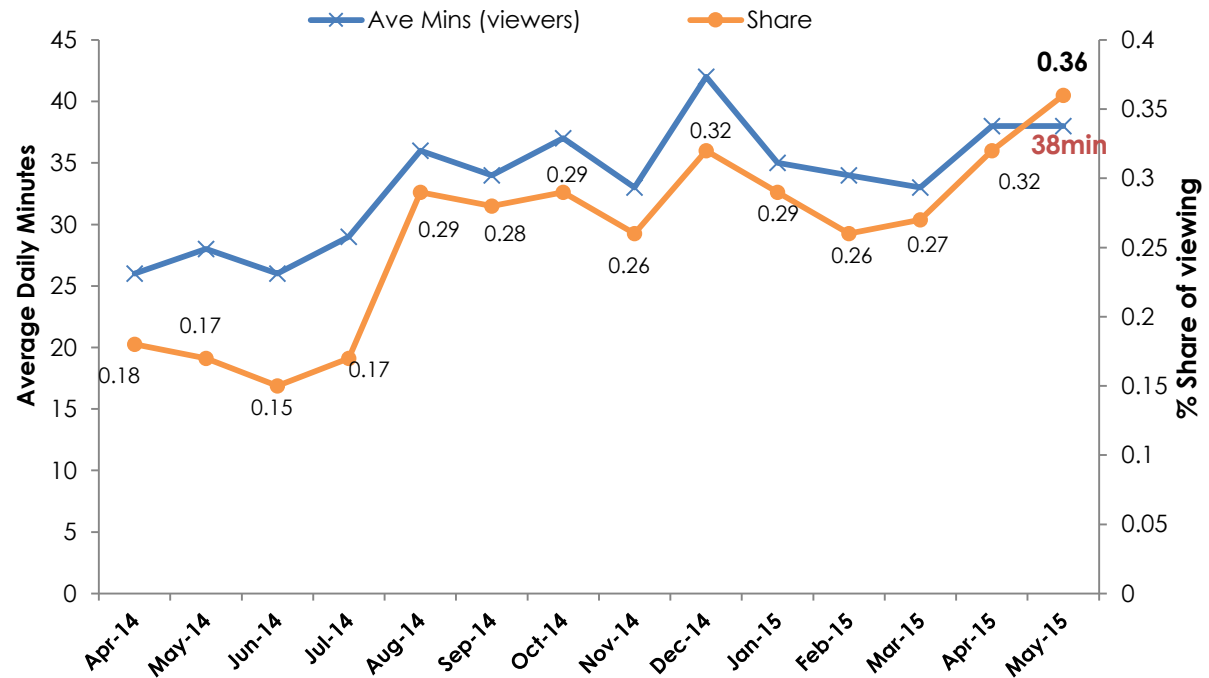


VIEWING

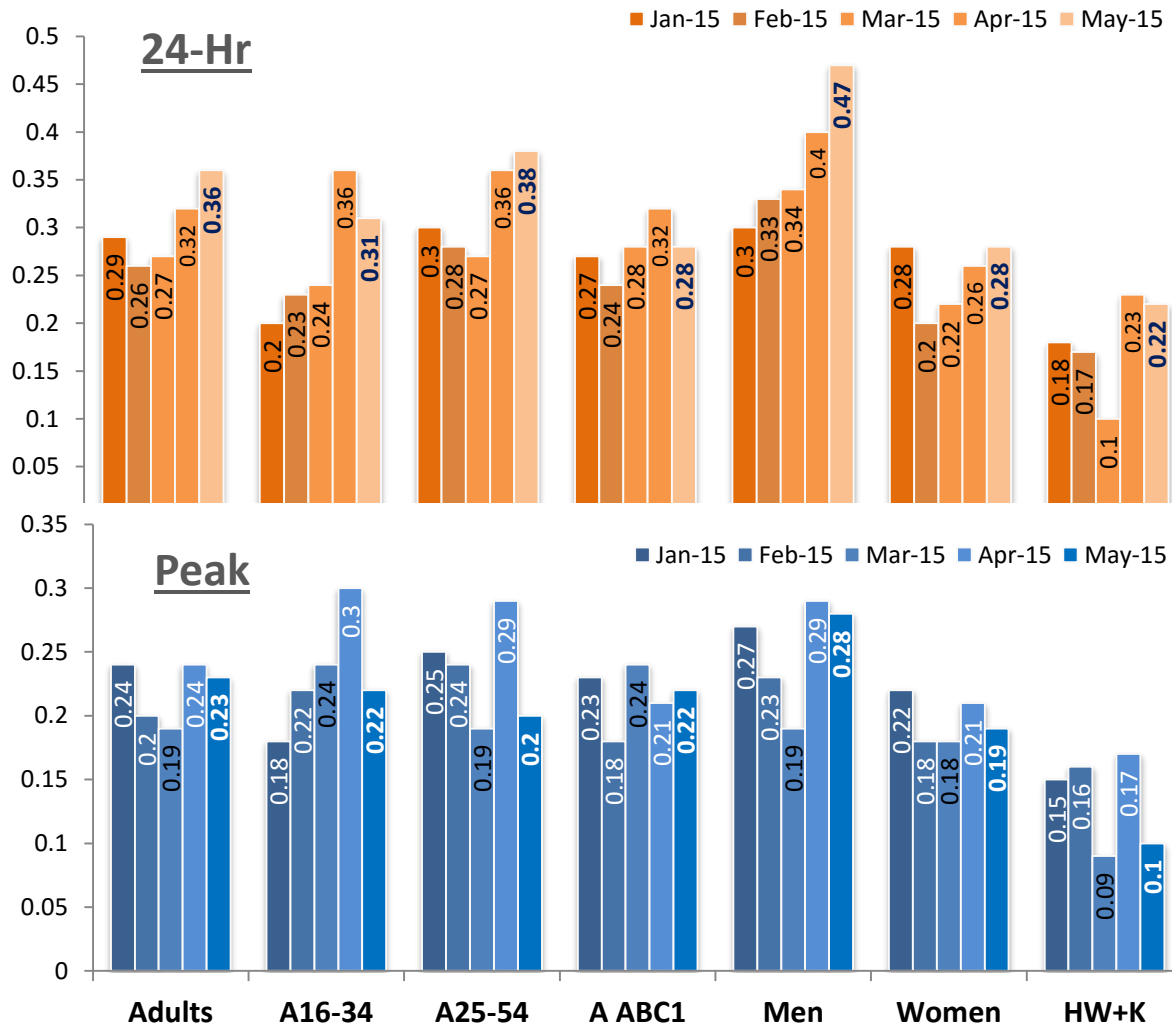


Share of viewing grew to 0.36%, up 13% m-o-m while more than doubling viewing share from this time last year. London Live ranks 50th in terms of share in ITV London region.

| Rank | Channel | Share |
|-----------|-----------------------|-------------|
| 1 | BBC 1 | 19.8 |
| 2 | ITV | 9.9 |
| 3 | BBC 2 | 5.4 |
| 4 | CH4 | 5.2 |
| 5 | Channel 5 | 3.6 |
| 6 | ITV3 | 2.2 |
| 7 | ITV2 | 1.7 |
| 9 | E4 | 1.4 |
| 10 | BBC News | 1.4 |
| 11 | BBC 3 | 1.2 |
| 12 | Film4 | 1.2 |
| 13 | Dave | 1.2 |
| 15 | Sky News | 1.1 |
| 19 | More4 | 1.0 |
| 22 | Sky Living | 0.9 |
| 23 | Sky 1 | 0.9 |
| 25 | 5 USA | 0.84 |
| 26 | Pick | 0.79 |
| 27 | Drama | 0.76 |
| 33 | Quest | 0.58 |
| 34 | True Entertainment | 0.52 |
| 37 | ITVBe | 0.50 |
| 38 | Sky Atlantic | 0.50 |
| 40 | Comedy Central | 0.46 |
| 44 | Watch | 0.40 |
| 47 | 5* | 0.39 |
| 48 | Really | 0.39 |
| 50 | London Live | 0.36 |
| 51 | FOX | 0.36 |
| 52 | Discovery | 0.35 |
| 53 | Universal | 0.34 |
| 55 | 4seven | 0.33 |
| 56 | more>movies/movie mix | 0.32 |
| 57 | Spike | 0.32 |
| 58 | Food Network | 0.30 |
| 59 | Horror Channel | 0.30 |



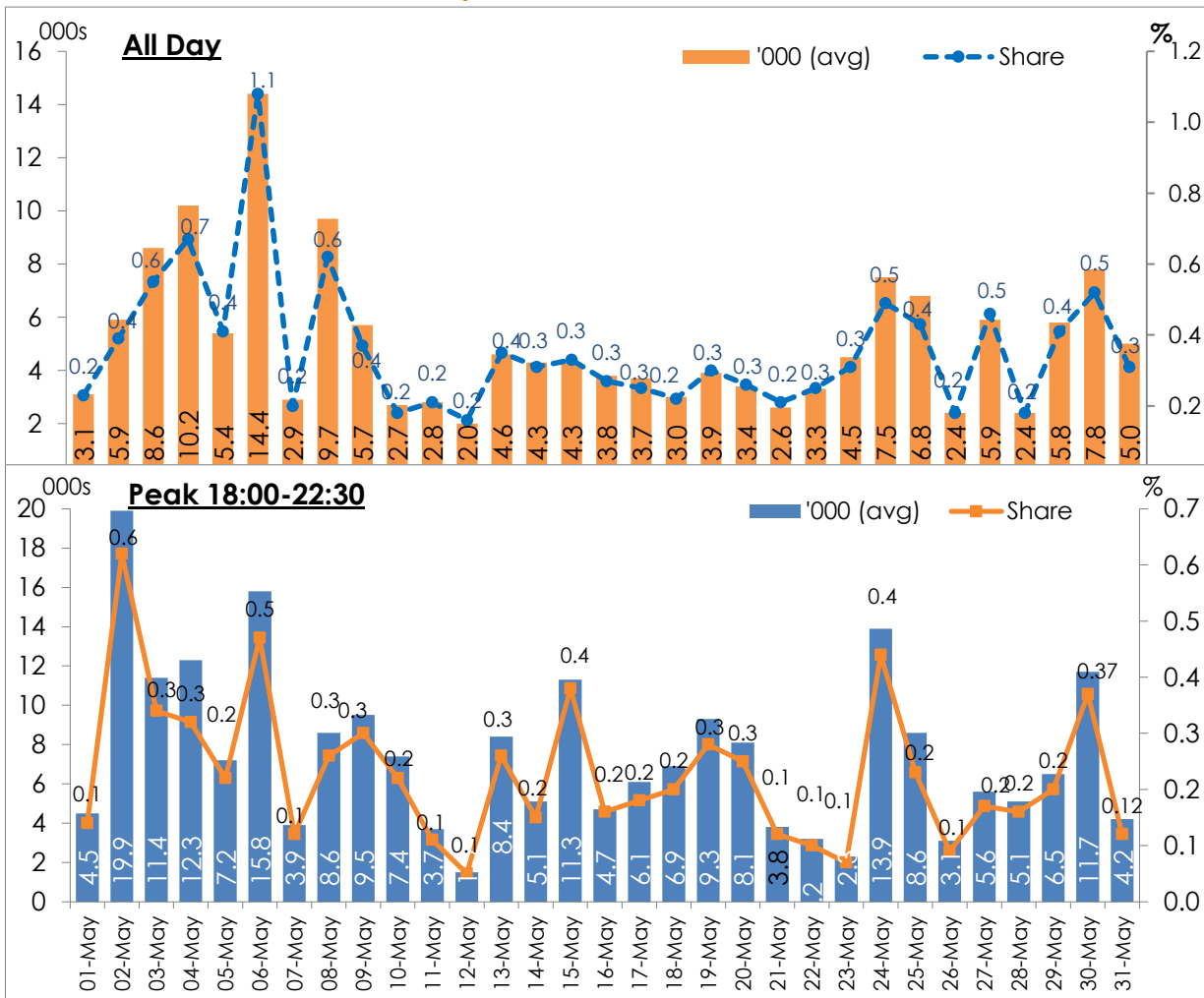
Monthly Share By Demographics



- May achieved record viewing among adults and Men 16+.
- Monthly growth also seen among A25-54 and Women; driven by daytime viewing.
- However, peak time viewing fell m-o-m across all key demographics.

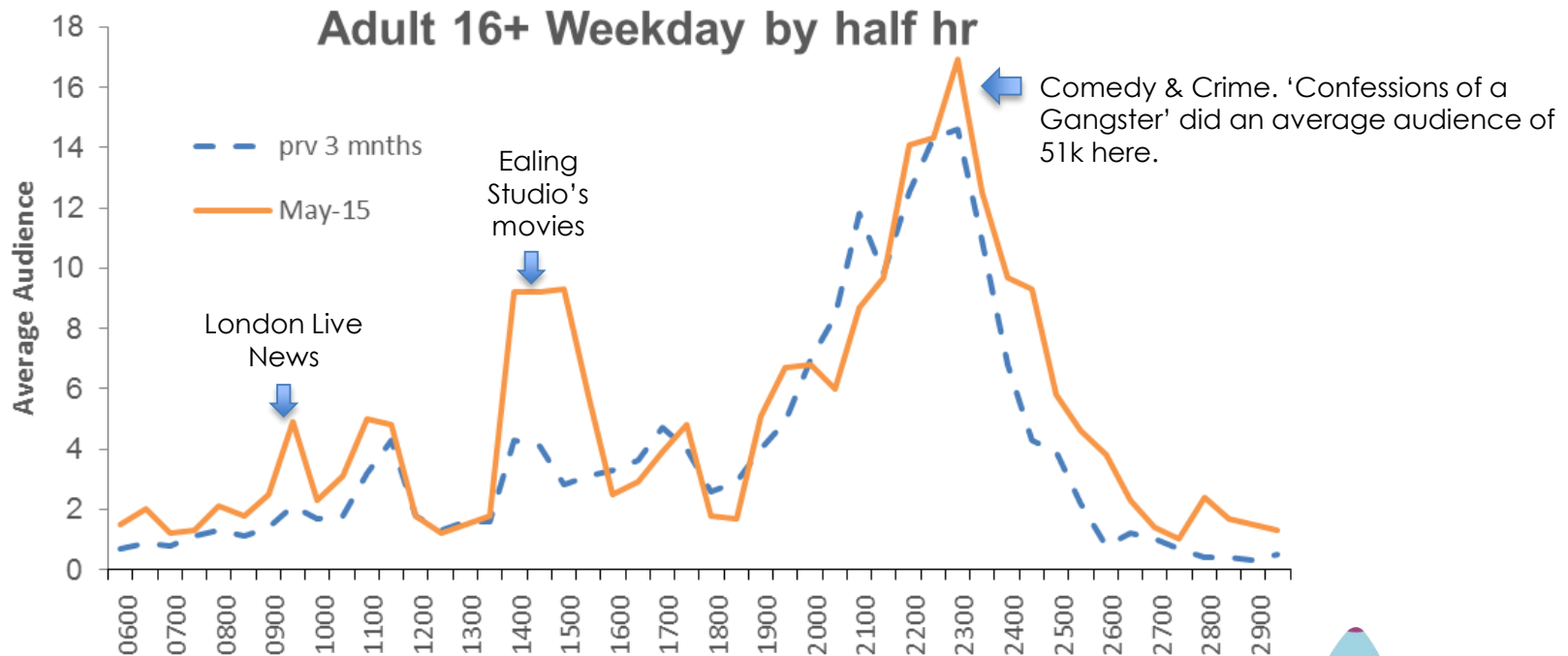


Viewing boosted by bank holidays – viewing pattern in May followed that of April's with a strong start boosted by bank holiday, followed by a quiet mid-month before picking up again at the 2nd bank holiday.



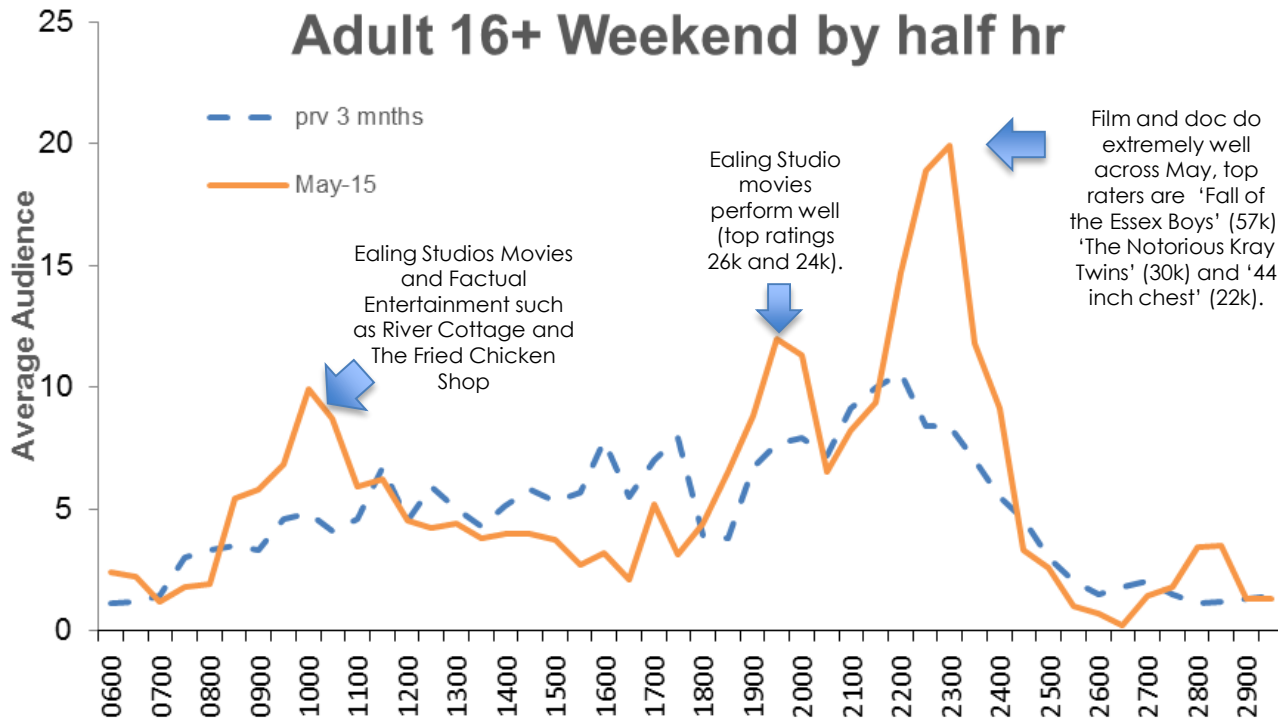
Day-part Review: Weekday A16+

Weekdays: Up +29% vs prev. 3 months in May and +20% M-o-M.



Day-part Review: Weekend A16+

Weekend: Up +15% vs previous 3 months in May and up +15% M-o-M.



PROGRAMMING



15 programmes achieved 100k+ ind. 4+ audience reach in May

- ❖ Adult 16+ reach in May boosts to 2.5 million up +9% M-o-M and +6% on previous 3 months.
- ❖ 15 programmes achieved over 100k reach (individuals), a small drop from 16 in April.
- ❖ The largest reaching programme in May is *London Live News* with 501k, this is the highest it has achieved since launch (previous high 401k).
- ❖ *The Notorious Kray Twins* followed closely with 452k reach based on just 6 showings and an average audience of 30k.
- ❖ *Fall of the Essex Boys* also achieved high reach of 325k from just 3 TXs.

| Programme Title | Adult 16+ Viewing | | | Reach 3 min+ | | |
|------------------------------------|-------------------|----------------|-------|--------------|--------|-----------------|
| | TVR | Av Aud 000s | Share | Individuals | Adults | 25-44 Adults |
| London live news | 0.03 | 2.6 | 0.19 | 501 | 487 | 214 |
| The notorious kray twins | 0.31 | 29.9 | 1.33 | 452 | 439 | 167 |
| Made in chelsea | 0.04 | 3.9 | 0.17 | 430 | 397 | 185 |
| Fall of the essex boys | 0.6 | 57.1 | 2.33 | 325 | 317 | 130 |
| Movie talk | 0.03 | 2.8 | 0.23 | 269 | 264 | 126 |
| Da ali g show | 0.03 | 3.2 | 0.3 | 218 | 210 | 56 |
| The end: confessions of a gangster | 0.27 | 25.4 | 0.98 | 193 | 176 | 79 |
| The tube | 0.06 | 5.9 | 0.47 | 181 | 146 | 59 |
| The fried chicken shop | 0.1 | 9.5 | 0.58 | 175 | 157 | 105 |
| Place invaders | 0.02 | 1.9 | 0.28 | 150 | 150 | 23 |
| Trigger happy tv | 0.03 | 3 | 0.41 | 147 | 139 | 67 |
| Ali g in da usaii | 0.06 | 5.7 | 0.33 | 136 | 118 | 82 |
| Ealing studios: the feminine touch | 0.12 | 11.5 | 0.73 | 125 | 119 | 25 |
| Ten years younger | 0.03 | 3.1 | 0.38 | 109 | 105 | 22 |
| London's burning | 0.04 | 3.4 | 0.62 | 106 | 106 | 62 |



Top 10 Drivers of Viewing

Adults 16+ (sorted by % of viewing)

- ❖ The top 10 shows in terms of viewing contribution accounted for 51% of the channel's viewing in May vs 41% for the top 10s in April.
- ❖ *The Notorious Kray Twins* has been the lead driver of viewing at 12.8%, effective considering it was only in the schedule for 2.2% of the time. Similarly, *Fall of the Essex Boys* delivered 8% of viewing vs just shy of 1% in the schedule.
- ❖ *London Live News* drives the strongest monthly reach at 487k, providing an excellent platform to bring in new viewers. Average audience went up by 13% m-o-m driven by some strong breakfast and lunchtime showings.
- ❖ *Made in Chelsea* maintained its high reach with interested output; though viewing is dropping and as a result, efficiency index fell below 100 for the first time since its launch in March.

| Programme Title | First Run Av Aud 000s | Av Aud 000s | MoM % change | Max Aud 000s | Share % | 3 min+ reach | No of TX's | % of Time in Schedule | % of Viewing | Index Viewing vs. Time |
|------------------------------------|-----------------------------|----------------|-----------------|-----------------|---------|-----------------|---------------|-----------------------------|-----------------|------------------------------|
| The notorious kray twins | 26 | 30 | - | 60 | 1.33 | 439 | 6 | 2.2 | 12.8 | 582 |
| Fall of the essex boys | 57 | 57 | - | 82 | 2.33 | 317 | 3 | 0.7 | 8.0 | 1143 |
| London live news | 2 | 3 | 13% | 18 | 0.19 | 487 | 77 | 16.0 | 8.0 | 50 |
| Made in chelsea | 8 | 4 | -13% | 30 | 0.17 | 397 | 66 | 9.0 | 6.7 | 74 |
| The end: confessions of a gangster | 22 | 25 | - | 51 | 0.98 | 176 | 3 | 0.8 | 3.8 | 475 |
| London's burning | 0 | 3 | -6% | 11 | 0.62 | 106 | 35 | 4.6 | 3.0 | 65 |
| Ealing studios: nowhere to go | 26 | 23 | - | 26 | 1.07 | 98 | 2 | 0.6 | 2.4 | 400 |
| Ealing studios: out of the clouds | 25 | 14 | - | 25 | 0.85 | 96 | 4 | 0.9 | 2.4 | 267 |
| Movie talk | 5 | 3 | 87% | 27 | 0.23 | 264 | 95 | 4.3 | 2.3 | 53 |
| The tube | 0 | 6 | 37% | 13 | 0.47 | 146 | 16 | 2.1 | 2.3 | 110 |

Ranked by % of viewing. The Index shows the % of viewing vs. the % in schedule demonstrating the return each programme delivers against the time it has been given within the schedule, relative to all other programmes on the channel.

I.e. if a programme delivered an index of 150 then it returns 50% more viewing per hour of schedule than the average programme on London Live. Programmes that account for a large percentage of viewing and deliver a good index are hugely valuable to a channel.



Top 10 Drivers of Viewing

25-54s (sorted by % viewing)

- ❖ The top 10 programmes drive 53% of all 25-54 viewing vs 39% of their time in the schedule.
- ❖ As with all adults *The Notorious Kray Twins* drove the most viewing with 12.8%, closely followed by *Fall of the Essex Boys* with 10% and a maximum average audience of 57k achieved on 8th May (70% of total viewers).
- ❖ Factual Entertainment resonate well with this audience, with '*The Tube*', '*Fried Chicken Shop*' and '*Ten years younger*' all featuring in the top 10 drivers for May's viewing as well as delivering M-o-M growth.

| Programme Title | First Run Av Aud 000s | Av Aud 000s | MoM % change | Max Aud 000s | Share % | 3 min+ reach | No of TX's | % of Time in Schedule | % of Viewing | Index Viewing vs. Time |
|------------------------------------|-----------------------------|----------------|-----------------|-----------------|---------|-----------------|---------------|-----------------------------|-----------------|------------------------------|
| The notorious kray twins | 4 | 16 | - | 32 | 1.31 | 271 | 6 | 2.2 | 12.8 | 582 |
| Fall of the essex boys | 32 | 39 | - | 57 | 2.94 | 196 | 3 | 0.7 | 10.2 | 1457 |
| London live news | 1 | 1 | 56% | 14 | 0.22 | 293 | 77 | 16.0 | 8.0 | 50 |
| Made in chelsea | 2 | 1 | 0% | 13 | 0.11 | 259 | 66 | 9.0 | 4.1 | 46 |
| The end: confessions of a gangster | 6 | 15 | - | 36 | 1.07 | 101 | 3 | 0.8 | 4.1 | 513 |
| The tube | 0 | 5 | 158% | 11 | 0.78 | 74 | 16 | 2.1 | 3.6 | 171 |
| 44 inch chest | 0 | 10 | - | 21 | 0.88 | 61 | 3 | 0.8 | 2.8 | 350 |
| The fried chicken shop | 0 | 8 | 17% | 29 | 1.04 | 140 | 7 | 1.0 | 2.8 | 280 |
| Movie talk | 3 | 2 | 114% | 21 | 0.25 | 175 | 95 | 4.3 | 2.3 | 53 |
| Ten years younger | 0 | 2 | 5% | 20 | 0.53 | 46 | 26 | 2.9 | 2.3 | 79 |

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 I.e. if a programme delivered an index of 150 then it returns 50% more viewing per hour of schedule than the average programme on London Live. Programmes that account for a large percentage of viewing and deliver a good index are hugely valuable to a channel.



Top 10 Best Episodes By Demographic

| <u>Adults</u> | | | | | |
|------------------------------------|--------|-------|------|-------|------|
| Programme Title | Date | Time | TVR | Share | '000 |
| Fall Of The Essex Boys | 08-May | 22:01 | 0.87 | 2.8 | 82 |
| The Notorious Kray Twins | 06-May | 21:00 | 0.63 | 1.8 | 60 |
| Fall Of The Essex Boys | 03-May | 22:03 | 0.60 | 1.9 | 57 |
| The End: Confessions Of A Gangster | 06-May | 23:44 | 0.54 | 5.9 | 51 |
| Spaced | 06-May | 01:39 | 0.39 | 9.3 | 37 |
| The Notorious Kray Twins | 25-May | 22:01 | 0.37 | 1.6 | 35 |
| Fall Of The Essex Boys | 04-May | 22:58 | 0.34 | 2.2 | 32 |
| The Notorious Kray Twins | 31-May | 22:02 | 0.32 | 1.4 | 30 |
| Made In Chelsea | 13-May | 19:59 | 0.32 | 0.9 | 30 |
| The Fried Chicken Shop | 15-May | 19:00 | 0.32 | 1.1 | 30 |

| <u>Adults ABC1</u> | | | | | |
|------------------------------------|--------|-------|------|-------|------|
| Programme Title | Date | Time | TVR | Share | '000 |
| Made In Chelsea | 13-May | 19:59 | 0.52 | 1.5 | 30 |
| The Notorious Kray Twins | 06-May | 21:00 | 0.51 | 1.6 | 29 |
| Green Wing | 30-May | 22:03 | 0.37 | 1.1 | 21 |
| Coupling | 30-May | 21:33 | 0.37 | 1.1 | 21 |
| Movie Talk | 10-May | 20:47 | 0.36 | 0.9 | 21 |
| Ten Years Younger | 30-May | 10:00 | 0.34 | 3.9 | 20 |
| Smack The Pony | 30-May | 23:01 | 0.33 | 1.4 | 19 |
| The End: Confessions Of A Gangster | 06-May | 23:44 | 0.30 | 4.4 | 17 |
| Fall Of The Essex Boys | 03-May | 22:03 | 0.30 | 1.1 | 17 |
| Coupling | 30-May | 21:03 | 0.29 | 0.9 | 17 |

| <u>Women</u> | | | | | |
|------------------------------------|--------|-------|------|-------|------|
| Programme Title | Date | Time | TVR | Share | '000 |
| Fall Of The Essex Boys | 08-May | 22:01 | 0.82 | 2.5 | 40 |
| The Notorious Kray Twins | 06-May | 21:00 | 0.53 | 1.4 | 26 |
| Ealing Studios: Nowhere To Go | 24-May | 19:00 | 0.38 | 1.2 | 19 |
| Da Ali G Show | 22-May | 23:02 | 0.35 | 1.2 | 17 |
| London Live News | 30-May | 12:00 | 0.34 | 2.6 | 17 |
| The End: Confessions Of A Gangster | 06-May | 23:44 | 0.34 | 3.4 | 17 |
| The Notorious Kray Twins | 25-May | 22:01 | 0.34 | 1.4 | 17 |
| Dead Body Squad | 20-May | 20:59 | 0.31 | 0.6 | 15 |
| 44 Inch Chest | 17-May | 22:02 | 0.31 | 1.1 | 15 |
| Ealing Studios: Out Of The Clouds | 02-May | 19:03 | 0.31 | 0.9 | 15 |

| <u>Men</u> | | | | | |
|------------------------------------|--------|-------|------|-------|------|
| Programme Title | Date | Time | TVR | Share | '000 |
| Fall Of The Essex Boys | 03-May | 22:03 | 0.93 | 2.9 | 43 |
| Fall Of The Essex Boys | 08-May | 22:01 | 0.92 | 3.2 | 42 |
| The End: Confessions Of A Gangster | 06-May | 23:44 | 0.74 | 9.4 | 34 |
| The Notorious Kray Twins | 06-May | 21:00 | 0.74 | 2.3 | 34 |
| Spaced | 06-May | 01:39 | 0.56 | 14.1 | 26 |
| The Notorious Kray Twins | 02-May | 20:59 | 0.53 | 1.7 | 25 |
| Fall Of The Essex Boys | 04-May | 22:58 | 0.50 | 3.0 | 23 |
| Real Crime: A Face From The Past | 03-May | 04:01 | 0.48 | 22.9 | 22 |
| The Notorious Kray Twins | 25-May | 22:01 | 0.41 | 1.9 | 19 |
| Made In Chelsea | 13-May | 19:59 | 0.38 | 1.2 | 18 |

