



TRENDS IN TELEVISION VIEWING

QUARTER 1 2003

Summary

This is the fifth issue of Trends in Television since the start of the new BARB panel in January 2002.

As before, some data is shown from the previous panel to provide a context, but care should be taken in comparing data from the two different panels.

Overall viewing has grown this quarter to almost four hours per day on average, the highest level for some years. In comparing this quarter with the same period a year ago, it must be remembered that the first quarter of 2002 was the first quarter of the new BARB panel, and as has been noted elsewhere, the viewing levels recorded then were probably artificially low. ([Table 1](#))

The decline in ITV1's share which was evident in the early part of 2002 appears now to have been contained. ([Table 2](#))

BBC1's share has averaged out only a little below that of last quarter, but it has shown clear growth on a week by week basis during the quarter. At the end of this quarter, the growth in the non-terrestrial channels' share has taken them to almost a quarter of all viewing. ([Table 3](#))

Demographically, channel performances retain much the same pattern as they have held for some time now. (Tables [4](#) and [5](#))

[Table 1](#) Average daily hours of viewing - all tv all individuals

[Table 2](#) Trends in Channel Share - all Individuals (consolidated - including non-terrestrial)

[Table 3](#) Weekly Channel Shares - This Quarter All Individuals (consolidated - including non-terrestrial)

[Table 4](#) Channel shares by demographics - all time - all individuals - 13 W/E 30th June 2002 (consolidated viewing including non-terrestrial)

[Table 5](#) Channel shares by demographics - peak time (1800-2259) - all individuals - 13 W/E 30th June 2002 (consolidated viewing including non-terrestrial)

[Table 6](#) Channel Shares by Platform - all time - all individuals - 13 W/E 30th June 2002

[Table 7](#) Average Weekly Patronage - All Individuals (Consolidated Data)

TV Trends 2003 Q1 Table 1

AVERAGE DAILY HOURS OF VIEWING - ALL TV ALL INDIVIDUALS

<u>Qtr 1</u>	<u>Qtr 2</u>	<u>Qtr 3</u>	<u>Qtr 4</u>	<u>FULL YEAR</u>	
OLD PANEL					
1991			<i>3.41*</i>	<i>4.09</i>	#
1992	<i>4.13</i>	<i>3.52</i>	<i>3.55</i>	<i>4.03</i>	<i>3.81</i>
1993	<i>4.07</i>	<i>3.41</i>	<i>3.34</i>	<i>3.93</i>	<i>3.69</i>
1994	<i>3.91</i>	<i>3.38</i>	<i>3.28</i>	<i>3.82</i>	<i>3.60</i>
1995	<i>3.94</i>	<i>3.38</i>	<i>3.21</i>	<i>3.84</i>	<i>3.59</i>
1996	<i>3.95</i>	<i>3.39</i>	<i>3.25</i>	<i>3.78</i>	<i>3.59</i>
1997	<i>3.89</i>	<i>3.41</i>	<i>3.29</i>	<i>3.77</i>	<i>3.59</i>
1998	<i>3.84</i>	<i>3.46</i>	<i>3.34</i>	<i>3.78</i>	<i>3.61</i>
1999	<i>3.91</i>	<i>3.48</i>	<i>3.35</i>	<i>3.93</i>	<i>3.67</i>
2000	<i>3.86</i>	<i>3.49</i>	<i>3.43</i>	<i>3.91</i>	<i>3.67</i>
2001	<i>3.95</i>	<i>3.46</i>	<i>3.34</i>	<i>3.75</i>	<i>3.62</i>
NEW PANEL					
2002	3.54	3.47	3.36	3.80	3.54
2003	3.99				

NOTES:

1. New panel commenced on 1st January 2002
 2. Figures in italics refer to previous panel
- * = Average of 8 weeks ending Sept 29th 1991 - new panel data only
 - # = No average quoted because of panel change

TV Trends 2003 Q1 Table 2

TRENDS IN CHANNEL SHARE - ALL INDIVIDUALS

	ITV1	C4	Five	Non Terrestrial	Total ITV1, C4, Five + Non Terrestrial	BBC1	BBC2	TOTAL
	%	%	%	%	%	%	%	%
2001 - Qtr 1	28.9	9.8	5.5	17.8	62.0	26.5	11.5	100.0
	<i>46.6</i>	<i>15.8</i>	<i>8.9</i>	<i>28.7</i>	<i>100.0</i>			
2001 - Qtr 2	27.5	10.4	5.7	19.4	63.0	26.2	10.7	100.0
	<i>43.6</i>	<i>16.5</i>	<i>9.1</i>	<i>30.8</i>	<i>100.0</i>			
2001 - Qtr 3	25.2	10.1	5.9	20.9	62.2	26.8	11.0	100.0
	<i>40.6</i>	<i>16.2</i>	<i>9.5</i>	<i>33.6</i>	<i>100.0</i>			
2001 - Qtr 4	25.2	9.6	5.8	20.4	61.1	27.8	11.2	100.0
	<i>41.2</i>	<i>15.8</i>	<i>9.6</i>	<i>33.4</i>	<i>100.0</i>			
2002 - Qtr 1	25.1	10.1	6.4	21.4	63.0	25.3	11.7	100.0
	<i>39.9</i>	<i>16.0</i>	<i>10.1</i>	<i>34.1</i>	<i>100.0</i>			
2002 - Qtr 2	24.2	10.2	6.4	21.3	62.1	27.2	10.7	100.0
	<i>39.0</i>	<i>16.4</i>	<i>10.3</i>	<i>34.3</i>	<i>100.0</i>			
2002 - Qtr 3	23.6	10.4	6.3	22.6	62.9	25.7	11.3	100.0
	<i>37.5</i>	<i>16.6</i>	<i>10.0</i>	<i>36.0</i>	<i>100.0</i>			
2002 - Qtr 4	23.9	9.5	6.2	22.2	61.8	26.6	11.6	100.0
	<i>38.6</i>	<i>15.4</i>	<i>10.0</i>	<i>36.0</i>	<i>100.0</i>			
2003 - Qtr 1	24.0	9.2	6.4	22.8	62.3	26.4	11.2	100.0
	<i>38.5</i>	<i>14.8</i>	<i>10.3</i>	<i>36.5</i>	<i>100.0</i>			

NOTE: Figures *not* in bold print refer to the previous panel

WEEKLY CHANNEL SHARES - THIS QUARTER ALL INDIVIDUALS

				NON-	TOTAL			
	<u>ITV</u>	<u>CH</u>	<u>Five</u>	<u>TERRESTRIAL</u>	<u>ITV1, C4, Five +</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	<u>1</u>	<u>4</u>			<u>NON-TERR</u>			
	%	%	%	%	%	%	%	%
Week Ending:-								
05.01.03	23.2	9.0	4.9	22.6	59.7	25.5	14.7	100.0
	38.9	15.1	8.2	37.9	100.0			
12.01.03	25.1	9.6	6.1	21.7	62.5	25.7	11.8	100.0
	40.2	15.4	9.8	34.7	100.0			
19.01.03	25.6	9.1	6.2	22.4	63.3	25.7	11.0	100.0
	40.4	14.1	9.8	35.4	100.0			
26.01.03	24.7	9.6	6.6	22.1	63.0	25.7	11.2	100.0
	39.2	15.2	10.5	35.1	100.0			
02.02.03	24.3	9.7	6.5	22.5	63.0	26.0	11.1	100.0
	38.6	15.4	10.3	35.7	100.0			
09.02.03	25.2	9.3	6.3	22.1	62.9	25.7	11.3	100.0
	40.1	14.8	10.0	35.1	100.0			
16.02.03	22.5	9.2	7.1	23.2	62.0	26.6	11.3	100.0
	36.6	14.8	11.5	37.4	100.0			
23.02.03	22.9	9.4	6.9	23.4	62.6	26.0	11.4	100.0
	36.6	15.0	11.0	37.4	100.0			
02.03.03	24.0	9.6	7.0	23.2	63.8	25.3	10.9	100.0
	37.6	15.0	11.0	36.4	100.0			
09.03.03	24.5	9.0	6.4	22.4	62.3	27.2	10.6	100.0
	39.3	14.4	10.3	36.0	100.0			
16.03.03	22.9	8.9	7.3	21.6	60.7	28.5	10.8	100.0
	37.7	14.7	12.0	35.6	100.0			
23.03.03	23.4	8.4	5.8	24.2	61.8	27.9	10.3	100.0
	37.9	13.6	9.4	39.2	100.0			
30.03.03	23.4	8.6	6.3	24.6	62.9	28.1	9.0	100.0
	37.2	13.7	10.0	39.1	100.0			

TV Trends 2003 Q1 Table 4

**CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME ALL INDIVIDUALS
- 13 W/E 30th March 2003**

	ITV	C 4	Five	Non- Terrestrial	Total ITV1, C4, Five + Non-Terr	BBC1	BBC2	Total
	%	%	%	%	%	%	%	
All Individuals	24.0	9.2	6.4	22.9	62.5	26.4	11.2	100.0
All Adults	24.5	9.6	6.4	21.3	61.8	27.0	11.2	100.0
16-34	21.7	10.5	6.1	30.9	69.2	21.9	8.9	100.0
35-54	23.5	8.7	6.1	26.0	64.3	25.5	10.2	100.0
55+	27.1	9.7	7.0	11.4	55.2	31.4	13.5	100.0
ABC1	23.1	10.3	5.3	21.0	59.7	28.5	11.8	100.0
C2DE	25.5	9.0	7.3	21.5	63.3	26.0	10.7	100.0
16-34 ABC1	20.6	11.6	5.3	30.7	68.2	22.3	9.4	100.0
35-54 ABC1	23.0	9.5	5.4	24.1	62.0	27.2	10.9	100.0
55+ ABC1	25.1	10.3	5.2	10.2	50.8	34.6	14.7	100.0
16-34 C2DE	22.7	9.6	6.7	31.1	70.1	21.5	8.4	100.0
35-54 C2DE	23.9	8.1	6.7	21.1	59.8	24.2	9.7	100.0
55+ C2DE	28.1	9.4	8.0	12.0	57.5	29.7	12.8	100.0
CHILDREN	19.6	6.0	5.4	36.6	67.6	21.3	11.1	100.0

TV Trends 2003 Q1 Table 5

**CHANNEL SHARES BY DEMOGRAPHICS -
PEAK TIME * - ALL INDIVIDUALS - 13 W/E 30th March 2003
(CONSOLIDATED VIEWING INC NON-TERRESTRIAL)**

				NON-	TOTAL			
	<u>ITV1</u>	<u>C 4</u>	<u>Five</u>	<u>TERRESTRIAL</u>	<u>ITV1, C4, Five, + NON-TERR</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
All Individuals	30.1	8.6	6.1	17.1	61.9	28.1	10.1	100.0
All Adults	30.5	8.8	6.2	16.0	61.5	28.5	10.0	100.0
16-34	25.6	10.9	6.2	24.1	66.8	23.9	9.2	100.0
35-54	28.6	8.7	6.1	19.5	62.9	27.1	10.0	100.0
55+	35.1	7.7	6.2	8.1	57.1	32.5	10.4	100.0
ABC1	27.6	10.2	5.2	15.8	58.8	30.1	11.1	100.0
C2DE	32.8	7.7	7.0	16.1	63.6	27.3	9.1	100.0
16-34 ABC1	23.8	12.3	5.5	24.1	65.7	24.4	10.0	100.0
35-54 ABC1	26.8	10.1	5.4	18.3	60.6	28.5	11.0	100.0
55+ ABC1	31.3	8.9	4.7	7.2	52.1	35.9	12.1	100.0
16-34 C2DE	27.3	9.8	6.8	24.2	68.1	23.5	8.5	100.0
35-54 C2DE	30.3	7.5	6.8	20.5	65.1	25.8	9.2	100.0
55+ C2DE	37.5	6.9	7.2	8.7	60.3	30.3	9.4	100.0
CHILDREN	25.9	6.6	5.6	27.7	65.8	23.5	10.8	100.0

*** 1800-2259**

TV Trends 2003 Q1 Table 6

CHANNEL SHARES BY PLATFORM - ALL TIME ALL INDIVIDUALS - 13 W/E 30th March 2003

				NON-	TOTAL			
	<u>ITV1</u>	<u>C4</u>	<u>Five</u>	<u>TERRESTRIAL</u>	<u>ITV1, C4, Five, + NON-TERR</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
All Platforms	24.0	9.2	6.4	22.8	62.4	26.4	11.2	100.0
Dig-sat	18.5	5.5	3.5	47.9	75.4	18.6	6.0	100.0
Dig-cable	19.1	5.6	5.1	44.8	74.6	19.1	6.3	100.0
Dig-terr	24.4	9.4	8.5	17.1	59.4	27.8	12.8	100.0
Total dig	19.2	5.8	4.5	44.3	73.8	19.6	6.6	100.0
Anlg-cable	16.9	5.1	6.8	50.8	79.6	15.3	5.1	100.0
Anlg terr	30.3	12.5	7.8	0.1	50.7	33.9	15.4	100.0
Total anlg	29.9	12.3	7.8	1.0	51.0	33.7	15.3	100.0

PLATFORM UNIVERSES - HOMES (000's)

	Dig-sat	Dig-cable	Dig-terr	Total Digital	Total anlg	Anlg cable	Anlg terr	All Platforms
01.04.02	5,583	2,223	974	8,716	15,865	1,637	14,013	24,528
	22.8	9.1	4.0	35.5	64.7	6.7	57.1	100
01.07.02	5,730	2,330	997	8,905	15,731	1,310	14,136	24,570
	23.3	9.5	4.1	36.2	64.0	5.3	57.5	100
01.10.02	6,105	2,292	763	9,015	15,645	1,148	14,265	24,613
	24.8	9.0	3.1	36.6	63.6	4.7	58.0	100
01.01.03	6,247	2,516	873	9,491	15,283	924	14,127	24,727
	25.3	10.0	3.5	38.4	61.8	3.7	57.1	100
01.04.03	6,372	2,156	1,398	9,718	15,101	1,222	13,647	24,772
	25.7	9.0	5.6	39.2	61.0	4.9	55.1	100

NOTE:

Included in the total are a small number of homes (less than 1%) still receiving analogue satellite signals

DEFINITION:

For the purposes of this table, viewing is allocated according to the home's reception capability rather than the set being used. Thus viewing to any analogue sets in digital homes is classified as "digital" in this table.

TV Trends 2003 Q1 Table 7

AVERAGE WEEKLY PATRONAGE - ALL INDIVIDUALS (CONSOLIDATED DATA)

	ITV1	C4	Five	Non- Terrestrial	BBC1	BBC2	Any TV At All
	%	%	%	%	%	%	%
2001							
January	88.4	79.7	51.0	36.7	90.6	80.5	95.2
February	87.7	78.2	50.2	37.4	90.3	80.5	95.3
March	88.0	77.2	50.1	37.2	90.1	80.0	95.1
April	87.0	77.1	50.0	38.5	89.7	76.9	95.0
May	84.4	74.3	48.3	38.4	87.7	74.2	94.1
June	84.0	74.4	47.5	38.1	87.1	73.1	93.7
July	81.8	72.6	48.2	38.4	86.0	72.8	92.7
August	79.8	69.9	48.9	37.8	84.4	72.3	91.0
September	82.6	72.5	49.1	39.1	87.4	74.6	92.8
October	83.5	74.1	50.7	39.5	88.3	75.5	93.7
November	85.2	74.8	52.3	40.1	88.6	77.5	94.2
December	85.2	73.4	49.8	39.6	87.8	75.4	93.0
2002							
January	83.1	73.7	48.9	38.4	85.3	75.6	91.1
February	85.7	76.3	52.0	41.3	87.2	77.2	93.5
March	84.2	73.8	50.0	41.1	85.5	76.6	92.9
April	81.3	70.0	49.0	40.6	82.2	71.4	90.0
May	80.3	70.2	48.6	40.1	83.3	71.9	89.5
June	82.9	73.1	49.9	40.4	85.8	73.4	91.1
July	81.6	75.0	50.1	41.8	84.8	74.5	91.9
August	81.8	70.2	48.0	41.4	83.8	73.1	90.5
September	83.4	70.2	50.4	42.3	85.8	74.2	92.2
October	84.0	72.7	52.9	42.5	87.4	77.8	92.9
November	85.5	76.1	53.0	43.3	88.2	78.9	93.3
December	85.6	76.1	51.2	44.3	88.6	77.5	93.8
2003							
January	86.3	76.1	51.7	44.5	88.9	79.3	94.0
February	86.9	76.7	54.3	46.2	89.9	79.3	95.3
March	85.4	73.7	52.3	46.9	89.5	77.8	95.4

NOTE: Figures not in bold print refer to the previous panel

PATRONAGE is defined as the percentage of the population tuning to a channel for at least three minutes during the week