

## **SUMMARY**

The Q2 2003 TV Trends Report shows that overall viewing was again high this quarter. This is the highest second quarter level since the start of the previous panel in 1992 and confirms the trend noted in the first quarter.

ITV's share of viewing is a little down on previous quarters, as the growth of the non-terrestrial channels continues to put pressure on the major terrestrial channels.

Channel 4 share is slightly up.

Channel 5 shows continued growth.

Demographically, channel performances retain much the same pattern as they have held for some time now.

The most significant development in the data by platform is the growth in the size of the digital terrestrial universe - now at almost twice the size reported in October 2002.



## **TRENDS IN TELEVISION VIEWING**

**Quarter 2 2003**

Jul-03

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

NOTES: 1. New panel commenced on 1st January 2002  
 2. Figures italics refer to previous panel

\* = Average of 8 weeks ending Sept 29th 1991 - new panel data only  
 # = No average quoted because of panel change

TABLE 2

## TRENDS IN CHANNEL SHARE

## ALL INDIVIDUALS

	<u>ITV</u>	<u>CH 4</u>	<u>Five</u>	<u>NON- ERRESTRI<sup>A</sup></u>	<u>TOTAL COMMERCIAL + NON-TERR.</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
2001 - Qtr 1	28.9	9.8	5.5	17.8	62.0	26.5	11.5	100.0
	46.6	15.8	8.9	28.7	100.0			
2001 - Qtr 2	27.5	10.4	5.7	19.4	63.0	26.2	10.7	100.0
	43.6	16.5	9.1	30.8	100.0			
2001 - Qtr 3	25.2	10.1	5.9	20.9	62.2	26.8	11.0	100.0
	40.6	16.2	9.5	33.6	100.0			
2001 - Qtr 4	25.2	9.6	5.8	20.4	61.1	27.8	11.2	100.0
	41.2	15.8	9.6	33.4	100.0			
<b>2002 - Qtr1</b>	<b>25.1</b>	<b>10.1</b>	<b>6.4</b>	<b>21.4</b>	<b>63.0</b>	<b>25.3</b>	<b>11.7</b>	<b>100.0</b>
	<b>39.9</b>	<b>16.0</b>	<b>10.1</b>	<b>34.1</b>	<b>100.0</b>			
<b>2002 - Qtr 2</b>	<b>24.2</b>	<b>10.2</b>	<b>6.4</b>	<b>21.3</b>	<b>62.1</b>	<b>27.2</b>	<b>10.7</b>	<b>100.0</b>
	<b>39.0</b>	<b>16.4</b>	<b>10.3</b>	<b>34.3</b>	<b>100.0</b>			
<b>2002 - Qtr 3</b>	<b>23.6</b>	<b>10.4</b>	<b>6.3</b>	<b>22.6</b>	<b>62.9</b>	<b>25.7</b>	<b>11.3</b>	<b>100.0</b>
	<b>37.5</b>	<b>16.6</b>	<b>10.0</b>	<b>36.0</b>	<b>100.0</b>			
<b>2002 - Qtr 4</b>	<b>23.9</b>	<b>9.5</b>	<b>6.2</b>	<b>22.2</b>	<b>61.8</b>	<b>26.6</b>	<b>11.6</b>	<b>100.0</b>
	<b>38.6</b>	<b>15.4</b>	<b>10.0</b>	<b>36.0</b>	<b>100.0</b>			
<b>2003 - Qtr1</b>	<b>24.0</b>	<b>9.2</b>	<b>6.4</b>	<b>22.8</b>	<b>62.3</b>	<b>26.4</b>	<b>11.2</b>	<b>100.0</b>
	<b>38.5</b>	<b>14.8</b>	<b>10.3</b>	<b>36.5</b>	<b>100.0</b>			
<b>2003 - Qtr 2</b>	<b>23.6</b>	<b>9.8</b>	<b>6.5</b>	<b>23.9</b>	<b>63.8</b>	<b>25.5</b>	<b>10.7</b>	<b>100.0</b>
	<b>37.0</b>	<b>15.4</b>	<b>10.1</b>	<b>37.5</b>	<b>100.0</b>			

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

TABLE 3

## WEEKLY CHANNEL SHARES - THIS QUARTER

## ALL INDIVIDUALS

Week Ending:-	<u>ITV</u>	<u>CH4</u>	<u>Five</u>	<u>NON- ERRESTRI<sup>a</sup></u>	<u>TOTAL COMMERCIAL + NON-TERR.</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
06.04.03	23.9 37.9	8.8 14.0	6.3 10.0	24.0 38.1	63.0 100.0	27.1	9.9	100.0
13.04.03	23.3 36.9	9.2 14.6	6.8 10.8	23.8 37.7	63.1 100.0	26.8	10.2	100.0
20.04.03	23.8 36.2	9.2 14.0	6.6 10.0	26.1 39.7	65.7 100.0	24.0	10.3	100.0
27.04.03	24.2 37.6	9.4 14.6	6.0 9.3	24.8 38.5	64.4 100.0	24.1	11.4	100.0
04.05.03	25.5 40.4	9.1 14.4	6.0 9.5	22.5 35.7	63.1 100.0	24.5	12.5	100.0
11.05.03	25.2 39.1	9.4 14.6	6.2 9.6	23.6 36.6	64.4 100.0	23.8	11.8	100.0
18.05.03	24.7 39.3	8.7 13.9	6.4 10.2	23.0 36.6	62.8 100.0	26.5	10.7	100.0
25.05.03	23.3 37.0	10.1 16.0	7.1 11.3	22.5 35.7	63.0 100.0	26.1	10.9	100.0
01.06.03	23.1 35.9	10.5 16.3	6.1 9.5	24.6 38.3	64.3 100.0	25.1	10.6	100.0
08.06.03	22.3 35.1	10.3 16.2	6.5 10.2	24.5 38.5	63.6 100.0	26.0	10.4	100.0
15.06.03	22.0 34.6	10.8 17.0	6.8 10.7	23.9 37.6	63.5 100.0	26.4	10.0	100.0
22.06.03	22.4 34.8	11.4 17.7	6.4 9.9	24.2 37.6	64.4 100.0	24.8	10.8	100.0
29.06.03	22.2 34.9	11.5 18.1	6.9 10.8	23.1 36.3	63.7 100.0	26.3	9.9	100.0

TABLE 4

## CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 29th JUNE 2003

	<u>ITV</u>	<u>CH4</u>	<u>CH5</u>	NON- <u>ERRESTRIA</u>	TOTAL COMMERCIAL <u>+ NON-TERR.</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
All Individu:	23.5	9.8	6.4	24.3	64.0	25.4	10.6	100.0
All Adults	24.1	10.2	6.5	22.5	63.3	26.1	10.7	100.0
16-34	20.9	12.4	5.7	32.0	71.0	20.8	8.2	100.0
35-54	23.1	9.4	6.4	27.2	66.1	24.4	9.5	100.0
55+	27.0	9.4	7.1	12.3	55.8	31.0	13.3	100.0
ABC1	22.3	10.9	5.3	22.5	61.0	27.4	11.5	100.0
C2DE	25.4	9.6	7.3	22.5	64.8	25.2	10.1	100.0
16-34 ABC1	19.7	13.8	5.1	31.1	69.7	21.6	8.8	100.0
35-54 ABC1	22.1	10.2	5.6	25.9	63.8	25.9	10.3	100.0
55+ ABC1	24.6	9.5	5.2	11.8	51.1	33.9	15.0	100.0
16-34 C2DE	21.9	11.4	6.2	32.8	72.3	20.1	7.6	100.0
35-54 C2DE	23.9	8.8	7.0	28.2	67.9	23.3	8.9	100.0
55+ C2DE	28.3	9.4	8.1	12.6	58.4	29.3	12.3	100.0
CHILDREN	18.8	6.7	5.5	39.4	70.4	19.3	10.4	100.0

TABLE 5

## CHANNEL SHARES BY DEMOGRAPHICS - PEAK TIME (1800-2259)

## ALL INDIVIDUALS - 13 W/E 29th JUNE 2003

	ITV	CH4	CH5	NON- ERRESTRI <sup>A</sup>	TOTAL COMMERCIAL + NON-TERR.	BBC1	BBC2	TOTAL
	%	%	%	%	%	%	%	%
All Individu:	29.2	9.3	6.4	18.3	63.2	26.9	9.9	100.0
All Adults	29.6	9.5	6.5	17.1	62.7	27.3	10.0	100.0
16-34	23.9	13.2	6.0	25.1	68.2	23.5	8.3	100.0
35-54	27.6	9.3	6.6	20.8	64.3	26.3	9.4	100.0
55+	34.7	7.4	6.7	18.6	67.4	30.5	11.5	100.0
ABC1	26.3	10.8	5.4	17.3	59.8	28.9	11.5	100.0
C2DE	32.1	8.4	7.4	17.1	65.0	26.1	8.9	100.0
16-34 ABC1	22.0	14.7	5.2	24.5	66.4	24.2	9.5	100.0
35-54 ABC1	25.2	10.5	5.8	20.2	61.7	27.5	10.7	100.0
55+ ABC1	30.5	8.1	5.0	8.8	52.4	33.8	13.8	100.0
16-34 C2DE	25.6	11.8	6.7	25.8	69.9	22.8	7.2	100.0
35-54 C2DE	29.6	8.2	7.4	21.3	66.5	25.2	8.3	100.0
55+ C2DE	37.3	6.9	7.8	9.5	61.5	28.4	10.1	100.0
CHILDREN	25.0	7.8	5.5	29.8	68.1	23.0	9.0	100.0

TABLE 6

## CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 29th JUNE 2003

	<u>ITV</u>	<u>CH 4</u>	<u>CH 5</u>	NON- <u>ERRESTRI<sup>A</sup></u>	TOTAL COMMERCIAL <u>+ NON-TERR.</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
All Platform	23.5	9.8	6.4	24.4	64.1	25.3	10.6	100.0
Dig-sat	17.9	6.3	3.7	48.9	76.8	17.5	5.7	100.0
Dig-cable	17.7	6.4	4.9	47.8	76.8	17.4	5.8	100.0
Dig-terr	25.1	10.6	8.7	17.6	62.0	26.1	11.9	100.0
Total dig	18.7	6.8	4.6	45.0	75.1	18.5	6.4	100.0
Anlg-cable	15.9	5.0	5.4	54.8	81.1	14.1	4.8	100.0
Anlg terr	30.2	13.1	7.9	0.3	51.5	33.6	14.9	100.0
Total anlg	29.8	12.9	7.9	1.6	52.2	33.1	14.7	100.0

## PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	<b>Total dig</b>	<b>Total anlg</b>	Anlg cable	Anlg terr	All Platforms
01.04.02	5,583	2,223	974	<b>8,716</b>	<b>15,865</b>	1,637	14,013	24,528
	22.8	9.1	4.0	<b>35.5</b>	<b>64.7</b>	6.7	57.1	100
01.07.02	5,730	2,338	997	<b>8,905</b>	<b>15,731</b>	1,310	14,136	24,570
	23.3	10	4.1	<b>36.2</b>	<b>64.0</b>	5.3	57.5	100
01.10.02	6,105	2,292	763	<b>9,015</b>	<b>15,645</b>	1,148	14,265	24,613
	24.8	9	3.1	<b>36.6</b>	<b>63.6</b>	4.7	58.0	100
01.01.03	6,247	2,516	873	<b>9,491</b>	<b>15,283</b>	924	14,127	24,727
	25.3	10	3.5	<b>38.4</b>	<b>61.8</b>	3.7	57.1	100
01.04.03	6,372	2,156	1,398	<b>9,718</b>	<b>15,101</b>	1,222	13,647	24,772
	25.7	9	5.6	<b>39.2</b>	<b>61.0</b>	4.9	55.1	100
01.07.03	6,470	2,156	1,510	<b>9,928</b>	<b>14,930</b>	1,122	13,576	24,811
	26.1	9	6.1	<b>40.0</b>	<b>60.2</b>	4.5	54.7	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.



TABLE 7

## AVERAGE WEEKLY PATRONAGE\*

## CONSOLIDATED DATA

## ALL INDIVIDUALS

	<u>ITV</u>	<u>CH 4</u>	<u>CH 5</u>	<u>NON- TERRESTRIAL</u>	<u>BBC1</u>	<u>BBC2</u>	<u>ANY TV AT ALL</u>
	%	%	%	%	%	%	%
<b>2001</b>							
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
<b>2002</b>							
January	<b>83.1</b>	<b>73.7</b>	<b>48.9</b>	<b>38.4</b>	<b>85.3</b>	<b>75.6</b>	<b>91.1</b>
February	<b>85.7</b>	<b>76.3</b>	<b>52.0</b>	<b>41.3</b>	<b>87.2</b>	<b>77.2</b>	<b>93.5</b>
March	<b>84.2</b>	<b>73.8</b>	<b>50.0</b>	<b>41.1</b>	<b>85.5</b>	<b>76.6</b>	<b>92.9</b>
April	<b>81.3</b>	<b>70.0</b>	<b>49.0</b>	<b>40.6</b>	<b>82.2</b>	<b>71.4</b>	<b>90.0</b>
May	<b>80.3</b>	<b>70.2</b>	<b>48.6</b>	<b>40.1</b>	<b>83.3</b>	<b>71.9</b>	<b>89.5</b>
June	<b>82.9</b>	<b>73.1</b>	<b>49.9</b>	<b>40.4</b>	<b>85.8</b>	<b>73.4</b>	<b>91.1</b>
July	<b>81.6</b>	<b>75.0</b>	<b>50.1</b>	<b>41.8</b>	<b>84.8</b>	<b>74.5</b>	<b>91.9</b>
August	<b>81.1</b>	<b>70.2</b>	<b>48.0</b>	<b>41.1</b>	<b>83.8</b>	<b>73.1</b>	<b>90.5</b>
September	<b>83.4</b>	<b>70.2</b>	<b>50.4</b>	<b>42.3</b>	<b>85.8</b>	<b>74.2</b>	<b>92.2</b>
October	<b>84.0</b>	<b>72.7</b>	<b>52.9</b>	<b>42.5</b>	<b>87.4</b>	<b>77.8</b>	<b>92.9</b>
November	<b>85.5</b>	<b>76.1</b>	<b>53.0</b>	<b>43.3</b>	<b>88.2</b>	<b>78.9</b>	<b>93.3</b>
December	<b>85.6</b>	<b>76.1</b>	<b>51.2</b>	<b>44.3</b>	<b>88.6</b>	<b>77.5</b>	<b>93.8</b>
<b>2003</b>							
January	<b>86.3</b>	<b>76.1</b>	<b>51.7</b>	<b>44.5</b>	<b>88.9</b>	<b>79.3</b>	<b>94.0</b>
February	<b>86.9</b>	<b>76.7</b>	<b>54.3</b>	<b>46.2</b>	<b>89.9</b>	<b>79.3</b>	<b>95.3</b>
March	<b>85.4</b>	<b>73.7</b>	<b>52.3</b>	<b>46.9</b>	<b>89.5</b>	<b>77.8</b>	<b>95.4</b>
April	<b>85.9</b>	<b>74.1</b>	<b>52.0</b>	<b>46.9</b>	<b>88.5</b>	<b>77.0</b>	<b>94.7</b>
May	<b>85.5</b>	<b>74.3</b>	<b>52.4</b>	<b>47.0</b>	<b>87.8</b>	<b>76.1</b>	<b>94.8</b>
June	<b>82.5</b>	<b>73.1</b>	<b>50.7</b>	<b>45.9</b>	<b>86.7</b>	<b>73.7</b>	<b>93.9</b>

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