

## SUMMARY

Average daily hours of viewing for all individuals stood at 3.56 hours in Quarter 2 – maintaining the high levels of viewing which have been recorded in recent quarters. (Table 1)

The non-terrestrial channels broke through the 40% share of viewing mark for the first time and now achieving a 41.7% share. The share of viewing to commercial channels grew marginally to 63.4% (Table 2)

Demographically, channel performances retain much the same pattern as they have held for some time now. The strong bias of the non-terrestrial audience to the young age groups remains the key feature of this table. (Table 3)

The switch to digital platforms continues with digital homes penetration now standing at 87.3%. (Table 4)

The terrestrial channels continue to lose overall patronage whilst the non-terrestrial channels have recorded marginal year on year growth. (Table 5)

Table 6 shows channel shares accumulated by broadcasting company. The BBC continues to be the largest broadcaster taking a 32.2% share.

Table 7 shows channel impact shares accumulated by the sales houses representing them. ITV continues to have the largest overall share of 35.7%; however, the balance between ITV1 and the other ITV services continues to change as ITV1 declines and the other ITV services grow.

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Most trend data in this report is confined to the period of the current BARB contract, but as before, some data is shown from the previous contract period to provide a context. Care should be taken in comparing data from the two different panels



## **TRENDS IN TELEVISION VIEWING**

**QTR 2 2009**

**April 2009**

TABLE 1

## AVERAGE DAILY HOURS OF VIEWING - ALL TV

## ALL INDIVIDUALS

	Qtr 1	Qtr 2	Qtr 3	Qtr 4	FULL YEAR
<i>OLD PANEL</i>					
1991			3.41*	4.09	#
1992	4.13	3.52	3.55	4.03	3.81
1993	4.07	3.41	3.34	3.93	3.69
1994	3.91	3.38	3.28	3.82	3.60
1995	3.94	3.38	3.21	3.84	3.59
1996	3.95	3.39	3.25	3.78	3.59
1997	3.89	3.41	3.29	3.77	3.59
1998	3.84	3.46	3.34	3.78	3.61
1999	3.91	3.48	3.35	3.93	3.67
2000	3.86	3.49	3.43	3.91	3.67
2001	3.95	3.46	3.34	3.75	3.62
<i>NEW PANEL</i>					
2002	3.54	3.47	3.36	3.80	3.54
2003	3.99	3.55	3.41	3.95	3.73
2004	4.00	3.50	3.46	3.89	3.71
2005	3.91	3.45	3.42	3.81	3.65
2006	3.89	3.43	3.31	3.76	3.60
2007	3.85	3.46	3.38	3.83	3.63
2008	3.97	3.57	3.54	3.88	3.74
2009	3.96	3.56			

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 AUDIENCE SHARE BY CHANNEL

## ALL INDIVIDUALS

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL	% OF VIEWING TO ADVERTISING CHANNELS	
	BBC1	BBC2	ITV1 + GMTV	CH 4	CH 4 + 1	Five	TOTAL			
	%	%	%	%	%	%	%	%		
2006 - Q <sub>Tr</sub> 2	23.5	8.6	19.9	10.4		5.7	68.0	32.0	100.0	
2006 - Q <sub>Tr</sub> 3	22.7	8.3	17.9	9.9		5.8	64.6	35.4	100.0	61.4
2006 - Q <sub>Tr</sub> 4	22.5	8.8	19.9	8.8		5.5	65.5	34.5	100.0	61.5
2007 - Q <sub>Tr</sub> 1	22.2	8.7	19.5	9.5		5.4	65.4	34.6	100.0	61.9
2007 - Q <sub>Tr</sub> 2	22.2	8.6	18.8	8.8		5.3	63.6	36.4	100.0	61.7
2007 - Q <sub>Tr</sub> 3	21.3	8.2	18.8	8.5		5.1	62.1	37.9	100.0	61.8
2007 - Q <sub>Tr</sub> 4	22.4	8.6	19.7	7.6	0.5	4.8	63.5	36.5	100.0	61.6
2008 - Q <sub>Tr</sub> 1	21.6	7.8	18.9	7.8	0.6	5.3	61.9	38.1	100.0	61.8
2008 - Q <sub>Tr</sub> 2	21.7	7.8	18.8	7.8	0.7	5.0	61.8	38.2	100.0	61.4
2008 - Q <sub>Tr</sub> 3	22.3	7.8	17.2	7.4	0.7	4.8	60.2	39.8	100.0	62.0
2008 - Q <sub>Tr</sub> 4	21.6	8.0	18.8	7.0	0.7	4.9	61.0	39.0	100.0	62.4
2009 - Q <sub>Tr</sub> 1	21.1	7.6	18.2	7.4	0.8	4.9	60.1	39.9	100.0	62.9
2009 - Q <sub>Tr</sub> 2	20.7	7.3	17.6	7.0	0.7	5.0	58.3	41.7	100.0	63.4

**CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME**

**ALL INDIVIDUALS - 13 W/E 28th JUNE 2009**

	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%
All Individuals	20.7	7.3	17.6	7.7	5.0	58.3	41.7	100.0
All Adults	21.7	7.6	18.2	7.8	5.2	60.5	39.5	100.0
Men	21.6	8.2	15.4	7.2	4.8	57.2	42.8	100.0
Women	21.8	7.2	20.5	8.3	5.5	63.2	36.8	100.0
Housewives	22.7	8.0	19.6	8.2	5.6	64.3	35.7	100.0
HW with children	16.1	4.3	16.9	8.2	5.0	50.4	49.6	100.0
16-34	14.0	4.7	13.1	9.2	4.3	45.2	54.8	100.0
35-54	19.4	6.2	17.2	7.7	5.0	55.5	44.5	100.0
55+	27.6	10.4	21.7	7.2	5.8	72.9	27.1	100.0
ABC1	23.6	8.7	15.8	7.8	4.2	60.2	39.8	100.0
C2DE	20.2	6.8	20.1	7.8	5.9	60.8	39.2	100.0
16-34 ABC1	16.4	5.7	12.2	9.4	4.2	47.9	52.1	100.0
35-54 ABC1	21.0	7.0	16.0	7.7	4.1	55.9	44.1	100.0
55+ ABC1	30.7	12.1	17.8	7.0	4.4	71.9	28.1	100.0
16-34 C2DE	12.0	3.7	13.9	8.9	4.3	42.8	57.2	100.0
35-54 C2DE	18.0	5.4	18.4	7.7	5.7	55.1	44.9	100.0
55+ C2DE	25.7	9.3	24.3	7.4	6.8	73.4	26.6	100.0
CHILDREN	10.7	3.9	11.9	6.5	3.4	36.4	63.6	100.0

TABLE 4

## PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
01.04.06	7948	2748	6875	<b>16748</b>	<b>8516</b>	549	7850	25213
	31.5	10.9	27.3	<b>66.4</b>	<b>33.8</b>	2.2	31.1	100.0
01.07.06	8082	2829	7326	<b>17295</b>	<b>7999</b>	496	7386	25263
	32.0	11.2	29.0	<b>68.5</b>	<b>31.7</b>	2.0	29.2	100.0
01.10.06	8218	2880	7646	<b>17604</b>	<b>7737</b>	445	7175	25312
	32.5	11.4	30.2	<b>69.5</b>	<b>30.6</b>	1.8	28.3	100.0
01.01.07	8320	2933	8831	<b>18226</b>	<b>7167</b>	368	6682	25319
	32.9	11.6	34.9	<b>72.0</b>	<b>28.3</b>	1.5	26.4	100.0
01.04.07	8335	3074	9233	<b>18642</b>	<b>6788</b>	288	6383	25380
	32.8	12.1	36.4	<b>73.5</b>	<b>26.7</b>	1.1	25.1	100.0
01.07.07	8382	3134	9811	<b>19213</b>	<b>6285</b>	228	5949	25442
	32.9	12.3	38.6	<b>75.5</b>	<b>24.7</b>	0.9	23.4	100.0
01.10.07	8493	3225	10545	<b>19877</b>	<b>5663</b>	173	5382	25503
	33.3	12.6	41.3	<b>77.9</b>	<b>22.2</b>	0.7	21.1	100.0
01.01.08	8752	3274	12017	<b>21104</b>	<b>4596</b>	131	4357	25633
	34.1	12.8	46.9	<b>82.3</b>	<b>17.9</b>	0.5	17.0	100.0
01.04.08	8808	3277	12239	<b>21316</b>	<b>4394</b>	148	4138	25696
	34.3	12.8	47.6	<b>83.0</b>	<b>17.1</b>	0.6	16.1	100.0
01.07.08	8876	3336	12465	<b>21506</b>	<b>4305</b>	151	4046	25760
	34.5	13.0	48.4	<b>83.5</b>	<b>16.7</b>	0.6	15.7	100.0
01.10.08	9084	3379	12989	<b>21618</b>	<b>4273</b>	144	4021	25823
	35.2	13.1	50.3	<b>83.7</b>	<b>16.5</b>	0.6	15.6	100.0
01.01.09	9332	3442	14008	<b>22294</b>	<b>3711</b>	143	3460	25931
	36.0	13.3	54.0	<b>86.0</b>	<b>14.3</b>	0.6	13.3	100.0
01.04.09	9530	3465	14292	<b>22483</b>	<b>3616</b>	120	3388	25996
	36.7	13.3	55.0	<b>86.5</b>	<b>13.9</b>	0.5	13.0	100.0
01.07.09	9738	3497	14735	<b>22763</b>	<b>3395</b>	132	3155	26062
	37.4	13.4	56.5	<b>87.3</b>	<b>13.0</b>	0.5	12.1	100.0

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

TABLE 5

## AVERAGE WEEKLY PATRONAGE\* - CONSOLIDATED DATA

## ALL INDIVIDUALS

	TERRESTRIAL					NON- TERRESTRIAL	ANY TV AT ALL
	BBC1	BBC2	ITV + GMTV	CH 4	Five		
	%	%	%	%	%	%	%
2003 Qtr 1	89.6	79.3	86.5	75.8	53.2	45.8	94.8
Qtr 2	87.7	75.6	84.7	73.9	51.7	46.6	94.5
Qtr 3	85.8	74.0	82.4	71.5	51.4	45.3	92.9
Qtr 4	89.0	77.6	86.3	75.0	54.6	48.5	94.8
2004 Qtr 1	88.7	76.6	85.5	74.2	55.1	50.7	94.9
Qtr 2	86.3	70.7	83.3	72.4	52.2	52.0	94.1
Qtr 3	84.7	70.7	79.7	70.1	51.6	52.3	92.7
Qtr 4	87.1	72.1	83.9	72.9	56.1	55.7	94.6
2005 Qtr 1	87.2	71.8	82.9	74.6	56.0	59.0	94.4
Qtr 2	84.6	68.1	80.2	70.9	52.9	59.1	93.3
Qtr 3	82.0	67.0	77.4	70.6	51.7	59.1	91.8
Qtr 4	86.0	70.3	81.3	72.1	54.5	62.2	94.1
2006 Qtr 1	85.4	70.7	80.7	73.6	55.0	65.2	94.1
Qtr 2	83.7	64.9	78.7	70.0	50.6	65.2	92.9
Qtr 3	80.9	63.9	74.3	66.9	49.7	65.3	91.5
Qtr 4	84.4	68.4	78.8	70.5	52.2	68.6	93.6
2007 Qtr 1	84.9	69.7	78.7	72.4	52.5	70.6	94.4
Qtr 2	83.7	65.3	76.3	68.7	48.4	70.5	93.7
Qtr 3	80.4	63.7	74.4	64.7	46.4	70.2	91.7
Qtr 4	84.6	69.7	79.4	69.0	50.7	74.6	93.8
2008 Qtr 1	84.3	68.1	78.4	70.6	53.2	77.7	94.1
Qtr 2	83.2	64.9	76.4	66.6	50.5	77.0	93.6
Qtr 3	80.3	65.2	72.7	62.5	48.9	75.6	91.6
Qtr 4	83.3	67.9	77.7	67.0	51.9	78.1	93.4
2009 Qtr 1	83.7	65.7	77.4	68.3	50.9	80.7	93.9
Qtr 2	82.2	62.5	75.0	64.3	48.5	80.7	93.9

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

TABLE 6

## TRENDS IN AUDIENCE SHARE BY BROADCASTER

	<b>BBC</b>	<b>Non-BBC</b>	<b>ITV</b>	<b>CH 4</b>	<b>Five</b>	<b>Sky</b>	<b>UKTV</b>	<b>Other Flextech</b>	<b>Discovery Channels</b>	<b>Other</b>
	%	%	%	%	%	%	%	%	%	%
<i>Includes:-</i>	BBC1		ITV1	CH 4	Five	All Sky branded	All UK branded	All other Flextech	All Discovery branded	
	BBC2		ITV2	E4	Fiver(+1)	channels	channels	channels:-	channels & Animal	
	BBC3		ITV3	FILM FOUR	Five US(+1)			Bravo		
	BBC4		ITV4**	S4C				Challenge		
	BBC NEWS 24		ITN NEWS	More4***				Ex. Sports		
	CBBC/CBEEBIES		GMTV	CH4+1				FTN		
			Men & M					Living		
								Trouble		
2007 - Qtr 2	34.2	65.8	22.7	11.9	6.1	6.3	3.2	2.3	1.2	12.1
2007 - Qtr 3	33.4	66.6	23.1	11.9	6.0	6.1	3.2	2.3	1.3	12.8
2007 - Qtr 4	34.5	65.5	23.9	10.8	5.8	6.4	3.5	2.3	1.1	11.7
2008 - Qtr 1	33.3	66.7	23.4	11.7	6.3	6.1	3.5	2.2	1.2	12.3
2008 - Qtr 2	33.5	66.5	23.6	11.7	6.1	5.7	3.3	2.2	1.2	12.7
2008 - Qtr 3	34.1	65.9	21.9	11.8	5.9	6.0	3.5	2.6	1.2	13.0
2008 - Qtr 4	33.4	66.6	24.0	11.2	6.0	6.3	3.6	2.5	1.2	11.8
2009 - Qtr 1	32.8	67.2	23.3	11.8	6.2	6.8	3.7	2.8	1.2	11.4
2009 - Qtr 2	32.2	67.8	23.0	11.5	6.3	7.0	3.7	2.8	1.3	12.2

\*\* From Nov 2005

\*\*\* from Oct 2005



TABLE 7

## TRENDS IN IMPACTS SHARE BY SALES HOUSE

	ITV1	Other ITV	GMTV	CH 4	Five	BSkyB	IDS	All others
	%	%	%	%	%	%	%	%
<i>Includes:-</i>	<i>ITV1</i>	<i>ITV2</i>	<i>GMTV</i>	<i>CH 4</i>	<i>Five</i>	<i>----- See Appendix -----</i>		
		<i>ITV3</i>		<i>E4</i>	<i>Fiver(+1)</i>			
		<i>ITN NEWS</i>		<i>FILM FOUR</i>	<i>Five US(+1)</i>			
		<i>ITV4**</i>		<i>S4C</i>				
		<i>Men &amp; M</i>		<i>More4***</i>				
				<i>CH4+1</i>				
2007 - Qtr 2	30.0	6.7	2.4	19.2	10.4	12.9	10.0	8.5
2007 - Qtr 3	30.8	7.6	2.3	19.5	10.6	9.7	10.5	9.0
2007 - Qtr 4	31.6	7.3	2.1	17.5	9.7	12.7	11.0	8.1
2008 - Qtr 1	30.0	7.8	2.1	18.9	10.5	12.3	10.7	7.9
2008 - Qtr 2	29.9	7.8	2.1	18.8	10.5	12.3	10.7	7.9
2008 - Qtr 3	27.6	8.1	2.1	19.6	10.1	12.7	11.0	8.8
2008 - Qtr 4	29.0	8.9	2.0	18.1	10.0	13.2	10.7	8.2
2009 - Qtr 1	28.1	8.5	2.0	19.1	10.3	13.5	11.2	7.5
2009 - Qtr 2	26.8	8.9	2.1	18.7	10.6	13.5	11.2	8.3

\*\* From Nov 2005

\*\*\* from Oct 2005