

## **SUMMARY**

This is the seventh issue of Trends in Television since the start of the new BARB contract and 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 is again high compared with recent years. This is now the fourth consecutive quarter to have shown overall viewing at a higher level than comparable previous quarters.

ITV's share of viewing continues to decline, as the growth of the non-terrestrial channels puts pressure on the major terrestrial channels.

Channel Four's share reached a high at the end of last quarter, but has since declined a little, ending up only slightly higher over the quarter as a whole.

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 these tables.

The digital terrestrial platform continues to show strong growth. For the first time we now see the number of digital homes in total standing at over 10 million.

Patronage figures are a little higher for most channels than they were a year ago, especially for the non-terrestrial channels as they increase their subscriber base.



## **TRENDS IN TELEVISION VIEWING**

Quarter 3 2003

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>	<b>3.41</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- TERRESTRIAL</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
	<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>			
<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>			
<b>2003 - Qtr 3</b>	<b>23.2</b>	<b>10.1</b>	<b>6.5</b>	<b>24.1</b>	<b>63.9</b>	<b>25.1</b>	<b>11.0</b>	<b>100.0</b>
	<b>36.3</b>	<b>15.8</b>	<b>10.2</b>	<b>37.6</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-</u>	<u>TOTAL</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	<u>TERRESTRIAL</u>	<u>+ NON-TERR.</u>	%	%	%
06.07.03	21.3	11.2	6.5	22.8	61.8	28.4	9.8	100.0
	34.5	18.1	10.5	36.9	100.0			
13.07.03	22.1	11.5	6.3	24.5	64.4	24.7	10.9	100.0
	34.3	17.9	9.8	38.0	100.0			
20.07.03	23.3	11.2	6.4	22.9	63.8	24.9	11.4	100.0
	36.5	17.6	10.0	35.9	100.0			
27.07.03	21.5	11.7	7.2	24.7	65.1	23.8	11.1	100.0
	33.0	18.0	11.1	37.9	100.0			
03.08.03	23.4	10.4	6.8	24.6	65.2	23.7	11.2	100.0
	35.9	16.0	10.4	37.7	100.0			
10.08.03	23.0	9.3	6.6	25.3	64.2	24.7	11.0	100.0
	35.8	14.5	10.3	39.4	100.0			
17.08.03	22.7	9.9	6.2	25.4	64.2	24.8	11.0	100.0
	35.4	15.4	9.7	39.6	100.0			
24.08.03	23.1	10.1	6.1	24.4	63.7	24.9	11.4	100.0
	36.3	15.9	9.6	38.3	100.0			
31.08.03	22.9	9.4	6.2	25.2	63.7	23.8	12.4	100.0
	35.9	14.8	9.7	39.6	100.0			
07.09.03	24.8	10.0	6.5	23.1	64.4	25.0	10.7	100.0
	38.5	15.5	10.1	35.9	100.0			
14.09.03	24.7	9.1	6.2	22.7	62.7	25.7	11.5	100.0
	39.4	14.5	9.9	36.2	100.0			
21.09.03	24.6	9.0	6.8	23.7	64.1	25.4	10.4	100.0
	38.4	14.0	10.6	37.0	100.0			
28.09.03	23.9	9.0	7.1	23.6	63.6	25.8	10.6	100.0
	37.6	14.2	11.2	37.1	100.0			

TABLE 4

## CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 28th SEPTEMBER 2003

	<u>ITV</u>	<u>CH4</u>	<u>CH5</u>	<u>NON- TERRESTRIAL</u>	<u>TOTAL COMMERCIAL + NON-TERR.</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
All Individu:	23.1	10.0	6.5	24.4	64.0	25.0	10.9	100.0
All Adults	23.8	10.5	6.5	22.4	63.2	25.8	11.0	100.0
16-34	19.9	12.8	6.3	32.1	71.1	21.0	7.9	100.0
35-54	22.8	9.7	6.5	27.2	66.2	24.0	9.9	100.0
55+	27.3	9.7	6.8	12.0	55.8	30.4	13.8	100.0
ABC1	21.7	11.6	5.6	22.3	61.2	27.1	11.8	100.0
C2DE	25.4	9.7	7.2	22.4	64.7	24.9	10.4	100.0
16-34 ABC1	18.5	14.5	5.8	30.7	69.5	21.9	8.5	100.0
35-54 ABC1	21.4	10.7	5.9	25.9	63.9	25.3	10.8	100.0
55+ ABC1	24.4	10.2	5.0	11.7	51.3	33.1	15.6	100.0
16-34 C2DE	21.0	11.5	6.7	33.3	72.5	20.2	7.3	100.0
35-54 C2DE	23.9	8.9	6.9	28.1	67.8	22.9	9.3	100.0
55+ C2DE	28.8	9.4	7.7	12.3	58.2	29.0	12.9	100.0
CHILDREN	17.0	6.6	5.9	41.2	70.7	18.5	10.9	100.0

TABLE 5

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

## ALL INDIVIDUALS - 13 W/E 28th SEPTEMBER 2003

	ITV %	CH4 %	CH5 %	NON- TERRESTRIAL %	TOTAL COMMERCIAL + NON-TERR. %	BBC1 %	BBC2 %	TOTAL %
All Individu:	28.5	9.4	6.6	18.7	63.2	26.5	10.3	100.0
All Adults	29.0	9.6	6.7	17.5	62.8	26.9	10.4	100.0
16-34	22.4	13.8	6.6	25.5	68.3	23.6	8.2	100.0
35-54	27.0	9.5	6.8	21.4	64.7	25.5	9.9	100.0
55+	34.6	7.2	6.6	9.6	58.0	30.1	12.1	100.0
ABC1	25.3	11.0	5.8	17.6	59.7	28.3	12.0	100.0
C2DE	31.8	8.5	7.3	17.4	65.0	25.9	9.1	100.0
16-34 ABC1	20.0	15.5	6.2	24.6	66.3	24.5	9.3	100.0
35-54 ABC1	24.3	10.8	6.3	20.7	62.1	26.6	11.4	100.0
55+ ABC1	30.2	7.9	5.1	9.3	52.5	33.0	14.5	100.0
16-34 C2DE	24.5	12.2	7.0	26.3	70.0	22.8	7.1	100.0
35-54 C2DE	29.4	8.3	7.2	21.9	66.8	24.6	8.6	100.0
55+ C2DE	37.3	6.7	7.5	9.7	61.2	28.3	10.5	100.0
CHILDREN	23.7	7.8	5.9	31.3	68.7	21.8	9.6	100.0

TABLE 6

## CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 28th SEPTEMBER 2003

	<u>ITV</u>	<u>CH 4</u>	<u>CH 5</u>	<u>NON- TERRESTRIAL</u>	<u>TOTAL COMMERCIAL + NON-TERR.</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
All Platform	23.1	10.0	6.5	24.4	64.0	25.0	11.0	100.0
Dig-sat	16.8	6.5	3.7	49.9	76.9	17.4	5.7	100.0
Dig-cable	16.8	6.8	5.0	48.3	76.9	17.1	6.0	100.0
Dig-terr	24.1	10.7	8.7	18.4	61.9	26.0	12.1	100.0
Total dig	17.8	7.1	4.7	45.3	74.9	18.5	6.6	100.0
Anlg-cable	15.6	5.3	5.3	53.5	79.7	15.2	5.1	100.0
Anlg terr	30.1	13.5	8.0	0.0	51.6	33.0	15.4	100.0
Total anlg	29.6	13.2	8.1	1.6	52.5	32.3	15.2	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
01.10.03	6,600	2,250	1,710	<b>10,354</b>	<b>14,544</b>	1,010	13,303	24,857
	26.6	9	6.9	<b>41.7</b>	<b>58.5</b>	4.1	53.5	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>
	%	%	%	%	%	%	%
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	<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>
2003							
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>
July	<b>81.8</b>	<b>72.3</b>	<b>50.8</b>	<b>44.8</b>	<b>85.4</b>	<b>73.4</b>	<b>92.8</b>
August	<b>81.5</b>	<b>70.1</b>	<b>49.4</b>	<b>45.0</b>	<b>84.7</b>	<b>73.4</b>	<b>91.9</b>
September	<b>84.2</b>	<b>72.0</b>	<b>54.2</b>	<b>46.5</b>	<b>87.4</b>	<b>75.2</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