

IPA TELEVISION TRENDS IN VIEWING REPORT:

QUARTER 3 2009

SUMMARY

Recorded average daily hours of viewing for individuals were 3.54 for the third quarter of 2009 – one of the highest levels ever recorded in recent years. However the recent growth pattern appears to be stabilising. (Table 1)

ITV, Channels Four and five are slightly down in share this period, whilst the non-terrestrial channels continue growing. (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, and has accelerated a little. Homes relying solely on analogue terrestrial signals are now below 10% for the first time. (Table 4)

All terrestrial channels are losing patronage with the exception of BBC2, whilst the non-terrestrial channels growth has stabilised for the moment. (Table 5)

Table 6 shows the channel shares accumulated by broadcasting company.

Table 7 shows channel impact shares accumulated by the sales houses representing them.

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

QUARTER 3 2009

October 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
NEW PANEL					
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	3.54		

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 - Qtr 3	22.7	8.3	17.9	9.9		5.8	64.6	35.4	100.0	61.4
2006 - Qtr 4	22.5	8.8	19.9	8.8		5.5	65.5	34.5	100.0	61.5
2007 - Qtr 1	22.2	8.7	19.5	9.5		5.4	65.4	34.6	100.0	61.9
2007 - Qtr 2	22.2	8.6	18.8	8.8		5.3	63.6	36.4	100.0	61.7
2007 - Qtr 3	21.3	8.2	18.8	8.5		5.1	62.1	37.9	100.0	61.8
2007 - Qtr 4	22.4	8.6	19.7	7.6	0.5	4.8	63.5	36.5	100.0	61.6
2008 - Qtr 1	21.6	7.8	18.9	7.8	0.6	5.3	61.9	38.1	100.0	61.8
2008 - Qtr 2	21.7	7.8	18.8	7.8	0.7	5.0	61.8	38.2	100.0	61.4
2008 - Qtr 3	22.3	7.8	17.2	7.4	0.7	4.8	60.2	39.8	100.0	62.0
2008 - Qtr 4	21.6	8.0	18.8	7.0	0.7	4.9	61.0	39.0	100.0	62.4
2009 - Qtr 1	21.1	7.6	18.2	7.4	0.8	4.9	60.1	39.9	100.0	62.9
2009 - Qtr 2	20.7	7.3	17.6	7.0	0.7	5.0	58.3	41.7	100.0	63.4
2009 - Qtr 3	20.8	7.7	16.3	6.5	0.7	4.9	57.0	43.0	100.0	62.6

TABLE 3**CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME****ALL INDIVIDUALS - 13 W/E 27th SEPTEMBER 2009**

	TERRESTRIAL						NON- TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL		
	%	%	%	%	%	%	%	%
All Individuals	20.8	7.7	16.4	7.3	4.9	57.0	43.0	100.0
All Adults	21.9	8.1	17.1	7.3	5.0	59.4	40.6	100.0
Men	21.9	8.7	14.2	6.7	4.8	56.3	43.7	100.0
Women	21.9	7.6	19.5	7.9	5.2	62.0	38.0	100.0
Housewives	22.9	8.4	18.8	7.7	5.4	63.2	36.8	100.0
HW with children	15.3	5.0	14.9	8.4	4.9	48.5	51.5	100.0
16-34	13.3	5.6	11.3	9.4	4.1	43.7	56.3	100.0
35-54	19.4	7.1	15.6	7.4	4.8	54.2	45.8	100.0
55+	28.6	10.1	21.5	6.2	5.7	72.0	28.0	100.0
ABC1	23.5	9.2	14.4	7.4	4.0	58.7	41.3	100.0
C2DE	20.7	7.2	19.1	7.2	5.8	60.0	40.0	100.0
16-34 ABC1	15.2	6.8	10.3	9.8	3.9	46.0	54.0	100.0
35-54 ABC1	20.8	8.1	13.9	7.5	3.9	54.3	45.7	100.0
55+ ABC1	31.3	11.8	17.5	5.9	4.3	70.8	29.2	100.0
16-34 C2DE	11.7	4.6	12.2	9.1	4.3	41.8	58.2	100.0
35-54 C2DE	18.1	6.3	17.0	7.3	5.5	54.1	45.9	100.0
55+ C2DE	26.8	9.0	24.0	6.4	6.6	72.9	27.1	100.0
CHILDREN	9.6	4.4	9.0	6.5	3.5	33.0	67.0	100.0

TABLE 4

PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
01.07.06	8082	2829	7326	17295	7999	496	7386	25263
	32.0	11.2	29.0	68.5	31.7	2.0	29.2	100.0
01.10.06	8218	2880	7646	17604	7737	445	7175	25312
	32.5	11.4	30.2	69.5	30.6	1.8	28.3	100.0
01.01.07	8320	2933	8831	18226	7167	368	6682	25319
	32.9	11.6	34.9	72.0	28.3	1.5	26.4	100.0
01.04.07	8335	3074	9233	18642	6788	288	6383	25380
	32.8	12.1	36.4	73.5	26.7	1.1	25.1	100.0
01.07.07	8382	3134	9811	19213	6285	228	5949	25442
	32.9	12.3	38.6	75.5	24.7	0.9	23.4	100.0
01.10.07	8493	3225	10545	19877	5663	173	5382	25503
	33.3	12.6	41.3	77.9	22.2	0.7	21.1	100.0
01.01.08	8752	3274	12017	21104	4596	131	4357	25633
	34.1	12.8	46.9	82.3	17.9	0.5	17.0	100.0
01.04.08	8808	3277	12239	21316	4394	148	4138	25696
	34.3	12.8	47.6	83.0	17.1	0.6	16.1	100.0
01.07.08	8876	3336	12465	21506	4305	151	4046	25760
	34.5	13.0	48.4	83.5	16.7	0.6	15.7	100.0
01.10.08	9084	3379	12989	21618	4273	144	4021	25823
	35.2	13.1	50.3	83.7	16.5	0.6	15.6	100.0
01.01.09	9332	3442	14008	22294	3711	143	3460	25931
	36.0	13.3	54.0	86.0	14.3	0.6	13.3	100.0
01.04.09	9530	3465	14292	22483	3616	120	3388	25996
	36.7	13.3	55.0	86.5	13.9	0.5	13.0	100.0
01.07.09	9738	3497	14735	22763	3395	132	3155	26062
	37.4	13.4	56.5	87.3	13.0	0.5	12.1	100.0
01.10.09	9966	3543	15562	23542	2643	117	2418	26127
	38.1	13.6	59.6	90.1	10.1	0.4	9.3	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 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
Qtr 3	80.0	64.3	71.0	60.2	47.9	80.3	92.5

* 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

	BBC	Non-BBC	ITV	CH 4	Five	Sky	UKTV	Other Flextech	Discovery Channels	Other
	%	%	%	%	%	%	%	%	%	%
<i>Includes:-</i>	<i>BBC1</i>		<i>ITV1</i>	<i>CH 4</i>	<i>Five</i>	<i>All Sky branded</i>	<i>All UK branded</i>	<i>All other Flextech</i>	<i>All Discovery branded</i>	
	<i>BBC2</i>		<i>ITV2</i>	<i>E4</i>	<i>Fiver(+1)</i>	<i>channels</i>	<i>channels</i>	<i>channels:-</i>	<i>channels & Animal</i>	
	<i>BBC3</i>		<i>ITV3</i>	<i>FILM FOUR</i>	<i>Five US(+1)</i>			<i>Bravo</i>		
	<i>BBC4</i>		<i>ITV4**</i>	<i>S4C</i>				<i>Challenge</i>		
	<i>BBC NEWS 24</i>		<i>ITN NEWS</i>	<i>More4***</i>				<i>Ex. Sports</i>		
	<i>CBBC/CBEEBIES</i>		<i>GMTV</i>	<i>CH4+1</i>				<i>FTN</i>		
			<i>Men & M</i>					<i>Living</i>		
								<i>Trouble</i>		
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
2009 - Qtr 3	32.9	67.1	21.7	11.2	6.2	7.2	3.9	2.7	1.2	13.1

** 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>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 & M</i>		<i>More4***</i>				
				<i>CH4+1</i>				
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
2009 - Qtr 3	25.3	9.1	2.0	18.6	10.4	14.3	11.8	8.6

**** From Nov 2005**

***** from Oct 2005**