



TRENDS IN TELEVISION VIEWING

QUARTER 4 2002

Summary

This is the fourth issue of IPA Trends in Television since the start of the new BARB contract and new panel on the 1st 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 levels this quarter continue to be in line with recent historical levels as measured by the previous panel. The full year average is, however, depressed by the low level recorded during the first quarter of 2002. ([Table 1](#)).

Uniquely among the commercial channels and non-terrestrial channels, ITV shows a small growth in share this quarter. Both BBC channels have performed well, leaving the total commercial/non-terrestrial sector with the lowest share seen for two years. ([Table 2](#)).

This strong BBC performance comes largely from a very strong share during the last week of the quarter. ([Table 3](#))

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

For most channels, patronage figures are a little higher than a year ago, whereas most quarters we are commenting on a decline in patronage. However, it must be remembered that the two years are measured by different panels. ([Table 7](#)).

[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 29th December 2002 (consolidated viewing including non-terrestrial)

[Table 5](#) Channel shares by demographics - peak time (1800-2259) - all individuals - 13 W/E 29th December 2002 (consolidated viewing including non-terrestrial)

[Table 6](#) Channel Shares by Platform - all time - all individuals - 13 W/E 29th December 2002

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

TV Trends 2002 Q4 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>	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

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 2002 Q4 Table 2

TRENDS IN CHANNEL SHARE - ALL INDIVIDUALS

	ITV	CH 4	CH 5	Non Terrestrial	Total Commercial + Non-Terr	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>			

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

TV Trends 2002 Q4 Table 3

WEEKLY CHANNEL SHARES - THIS QUARTER ALL INDIVIDUALS

				NON-	TOTAL			
	ITV	CH 4	CH 5	TERRESTRIAL	COMMERCIAL + NON-TERR	BBC1	BBC2	TOTAL
	%	%	%	%	%	%	%	%
Week Ending: -								
06.10.02	24.5	8.8	7.0	21.9	62.2	26.8	11.0	100.0
	39.4	14.1	11.3	35.2	100.0			
13.10.02	23.6	8.9	6.6	21.5	60.6	27.2	12.1	100.0
	38.9	14.7	10.9	35.5	100.0			
20.10.02	24.3	8.7	6.2	21.3	60.5	27.4	12.1	100.0
	40.2	14.4	10.2	35.2	100.0			
27.10.02	23.5	9.1	6.1	23.0	61.7	26.5	11.9	100.0
	38.1	14.7	9.9	37.3	100.0			
03.11.02	23.9	8.5	6.2	22.3	60.9	26.5	12.6	100.0
	39.2	14.0	10.2	36.6	100.0			
10.11.02	24.4	9.6	6.3	22.4	62.7	25.9	11.5	100.0
	38.9	15.3	10.0	35.7	100.0			
17.11.02	24.6	9.4	6.7	21.2	61.9	26.3	11.7	100.0
	39.7	15.2	10.8	34.2	100.0			
24.11.02	23.4	10.4	6.3	21.4	61.5	26.4	12.1	100.0
	38.0	16.9	10.2	34.8	100.0			
01.12.02	23.1	10.8	6.7	22.1	62.7	25.6	11.7	100.0
	36.8	17.2	10.7	35.2	100.0			
08.12.02	24.4	10.5	6.1	22.9	63.9	25.3	10.7	100.0
	38.2	16.4	9.5	35.8	100.0			
15.12.02	24.6	10.0	5.7	23.0	63.3	25.8	10.9	100.0
	38.9	15.8	9.0	36.3	100.0			
22.12.02	24.1	10.1	5.9	23.5	63.6	25.3	11.1	100.0
	37.9	15.9	9.3	36.9	100.0			
29.12.02	22.1	9.1	4.6	22.4	58.2	30.1	11.7	100.0
	38.0	15.6	7.9	38.5	100.0			

TV Trends 2002 Q4 Table 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME ALL INDIVIDUALS - 13 W/E
29th DECEMBER 2002

	ITV	CH 4	CH 5	Non- Terrestrial	Total Commercial + Non-Terr	BBC1	BBC2	Total
	%	%	%	%	%	%	%	
All Individuals	23.7	9.5	6.1	22.3	61.6	26.5	11.6	100.0
All Adults	24.1	9.9	6.2	20.6	60.8	27.2	11.7	100.0
16-34	21.6	11.4	6.0	29.3	68.3	22.0	9.3	100.0
35-54	23.3	9.3	6.0	24.9	63.5	25.8	10.5	100.0
55+	26.3	9.5	6.6	11.5	53.9	31.6	14.3	100.0
ABC1	22.4	10.6	5.4	19.2	57.6	29.1	12.9	100.0
C2DE	25.2	9.4	6.8	21.5	62.9	25.8	10.9	100.0
16-34 ABC1	20.3	12.5	5.3	28.1	66.2	23.1	10.4	100.0
35-54 ABC1	22.3	10.1	5.4	22.3	60.1	28.0	11.6	100.0
55+ ABC1	24.1	9.7	5.4	9.0	48.2	35.2	16.3	100.0
16-34 C2DE	22.7	10.6	6.5	30.2	70.0	21.2	8.4	100.0
35-54 C2DE	24.1	8.7	6.4	26.8	66.0	24.1	9.7	100.0
55+ C2DE	27.4	9.3	7.3	12.8	56.8	29.7	13.2	100.0
CHILDREN	20.5	6.9	5.1	35.0	67.5	21.6	10.4	100.0

TV Trends 2002 Q4 Table 5

CHANNEL SHARES BY DEMOGRAPHICS - PEAK TIME (1800-2259)
ALL INDIVIDUALS - 13 W/E 29th December 2002

				NON-	TOTAL			
	<u>ITV</u>	<u>CH</u> <u>4</u>	<u>CH</u> <u>5</u>	<u>TERRESTRIAL</u>	<u>COMMERCIAL + NON-</u> <u>TERR</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
All Individuals	29.3	8.7	6.0	16.4	60.4	28.5	10.8	100.0
All Adults	29.7	8.9	6.1	15.3	60.0	29.0	10.9	100.0
16-34	25.1	11.6	6.0	22.5	65.2	24.4	10.1	100.0
35-54	28.0	9.0	6.0	19.0	62.0	27.7	10.6	100.0
55+	34.0	7.1	6.3	8.1	55.5	32.9	11.5	100.0
ABC1	26.5	10.0	5.3	14.3	56.1	31.3	12.6	100.0
C2DE	32.1	8.0	6.8	16.0	62.9	27.3	9.6	100.0
16-34 ABC1	23.1	12.8	5.4	21.4	62.7	25.6	11.5	100.0
35-54 ABC1	25.7	10.1	5.3	16.7	57.8	29.8	12.1	100.0
55+ ABC1	29.8	7.8	5.1	6.4	49.1	37.0	13.8	100.0
16-34 C2DE	26.8	10.7	6.5	23.5	67.5	23.3	8.9	100.0
35-54 C2DE	29.9	8.1	6.6	20.1	64.7	25.8	9.3	100.0
55+ C2DE	36.5	6.6	7.0	9.2	59.3	30.4	10.1	100.0
CHILDREN	26.1	7.3	5.4	26.0	64.8	24.5	10.4	100.0

TV Trends 2002 Q4 Table 6

CHANNEL SHARES BY PLATFORM - ALL TIME ALL INDIVIDUALS - 13 W/E 29th December 2002

				NON-	TOTAL			
	<u>ITV</u>	<u>CH 4</u>	<u>CH 5</u>	<u>TERRESTRIAL</u>	<u>COMMERCIAL + NON-TERR</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
All Platforms	23.5	9.7	6.3	22.3	61.8	26.4	11.8	100.0
Dig-sat	18.0	6.0	3.6	47.2	74.8	19.2	6.0	100.0
Dig-cable	18.6	6.1	5.3	45.3	75.3	18.6	6.1	100.0
Dig-terr	25.1	9.2	8.4	15.9	58.6	29.1	12.3	100.0
Total dig	19.0	6.0	4.4	44.4	73.8	19.8	6.4	100.0
Anlg-cable	16.4	4.9	6.6	49.1	77.0	16.4	6.6	100.0
Anlg terr	29.7	12.9	7.4	0.0	50.0	33.8	16.2	100.0
Total anlg	29.3	12.1	7.0	3.2	51.6	33.1	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	2,338	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	9.3	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	10.2	3.5	38.4	61.8	3.7	57.1	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 2002 Q4 Table 7

AVERAGE WEEKLY PATRONAGE * CONSOLIDATED DATA ALL INDIVIDUALS

	ITV	CH 4	CH 5	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	81.1	70.2	48.0	41.1	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

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