

SUMMARY

This is the eighth issue of Trends in Television since the start of the new contract and new panel in January 2002.

As before, some data are shown from the previous panel to provide a context, but care should be taken in comparing data from the two different panels.

The total television viewing levels continue to grow, recording increases for both Quarter 4 and 2003 as a whole.

ITV's share of viewing has lifted slightly this quarter, mainly at the expense of Channel Four and the non-terrestrial channels. (Table 2)

The most noticeable feature of the weekly shares is the strong performance of BBC1 during Christmas week. This additional share seems to have been taken mostly from ITV. (Table 3)

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. (Tables 4 and 5)

The digital terrestrial platform continues to show strong growth. Total digital homes continue to grow, having passed the 10 million mark last quarter. (Table 6)

Patronage figures are a little higher for most channels than they were a year ago, especially for the combined non-terrestrial channels which are now nearing a weekly patronage figure of 50%. (Table 7).



TRENDS IN TELEVISION VIEWING

Quarter 4 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>
OLD PANEL					
<i>1991</i>			<i>3.41*</i>	<i>4.09</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>
NEW PANEL					
2002	3.54	3.47	3.36	3.80	3.54
2003	3.99	3.55	3.41	3.95	3.73

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

TABLE 2

TRENDS IN CHANNEL SHARE

ALL INDIVIDUALS

	<u>ITV1</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>			
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>			
2003 - Qtr 1	24.0	9.2	6.4	22.8	62.3	26.4	11.2	100.0
	<i>38.5</i>	<i>14.8</i>	<i>10.3</i>	<i>36.5</i>	<i>100.0</i>			
2003 - Qtr 2	23.6	9.8	6.5	23.9	63.8	25.5	10.7	100.0
	<i>37.0</i>	<i>15.4</i>	<i>10.1</i>	<i>37.5</i>	<i>100.0</i>			
2003 - Qtr 3	23.2	10.1	6.5	24.1	63.9	25.1	11.0	100.0
	<i>36.3</i>	<i>15.8</i>	<i>10.2</i>	<i>37.6</i>	<i>100.0</i>			
2003 - Qtr 4	23.8	9.6	6.5	23.7	63.5	25.4	11.1	100.0
	<i>37.5</i>	<i>15.0</i>	<i>10.2</i>	<i>37.3</i>	<i>100.0</i>			

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

TABLE 3

WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

Week Ending:-	<u>TIV1</u>	<u>CH4</u>	<u>Five</u>	<u>NON-</u>	<u>TOTAL</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	TERRESTRIAL	COMMERCIAL + NON-TERR.	%	%	%
05.10.03	23.4 36.8	9.5 14.9	7.3 11.5	23.4 36.8	63.6 100.0	25.9	10.5	100.0
12.10.03	24.7 38.3	9.9 15.3	6.6 10.2	23.3 36.1	64.5 100.0	25.0	10.6	100.0
19.10.03	23.9 37.3	9.4 14.7	7.4 11.5	23.4 36.5	64.1 100.0	25.0	10.9	100.0
26.10.03	24.3 38.1	9.4 14.8	6.9 10.8	23.1 36.3	63.7 100.0	25.4	10.9	100.0
02.11.03	23.3 36.3	9.6 15.0	6.4 10.0	24.9 38.8	64.2 100.0	24.5	11.3	100.0
09.11.03	24.6 37.8	10.4 16.0	6.9 10.6	23.1 35.5	65.0 100.0	24.1	10.8	100.0
16.11.03	24.2 38.3	9.6 15.2	6.3 10.0	23.1 36.6	63.2 100.0	25.4	11.3	100.0
23.11.03	24.6 38.9	9.3 14.7	6.6 10.4	22.7 35.9	63.2 100.0	26.1	10.8	100.0
30.11.03	23.3 36.5	9.8 15.4	7.1 11.1	23.6 37.0	63.8 100.0	25.1	11.2	100.0
07.12.03	23.9 37.3	9.3 14.5	6.7 10.5	24.2 37.8	64.1 100.0	24.6	11.3	100.0
14.12.03	23.5 36.9	9.6 15.1	6.0 9.4	24.5 38.5	63.6 100.0	24.9	11.5	100.0
21.12.03	24.4 38.5	9.2 14.5	5.4 8.5	24.4 38.5	63.4 100.0	24.9	11.5	100.0
28.12.03	21.5 35.8	9.2 15.3	4.8 8.0	24.6 40.9	60.1 100.0	28.5	11.4	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 28th DECEMBER 2003

	<u>ITV1</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 Individuals	23.7	9.5	6.4	24.2	40.1	25.3	11.0	100.0
All Adults	24.3	9.9	6.4	22.3	62.9	25.9	11.2	100.0
16-34	21.5	11.9	6.2	31.2	70.8	20.9	8.4	100.0
35-54	23.5	9.2	6.4	27.1	66.2	23.8	9.9	100.0
55+	26.6	9.3	6.7	12.5	55.1	30.9	14.1	100.0
ABC1	22.6	10.9	5.4	21.5	60.4	27.4	12.1	100.0
C2DE	25.4	9.2	7.1	22.9	64.6	24.9	10.5	100.0
16-34 ABC1	20.4	13.6	5.9	28.3	68.2	22.0	9.7	100.0
35-54 ABC1	22.5	10.1	5.7	25.4	63.7	25.5	10.8	100.0
55+ ABC1	24.5	9.7	4.8	11.9	50.9	33.6	15.5	100.0
16-34 C2DE	22.3	10.4	6.4	33.5	72.6	20.1	7.3	100.0
35-54 C2DE	24.4	8.5	7.0	28.4	68.3	22.5	9.2	100.0
55+ C2DE	27.8	9.1	7.6	12.9	57.4	29.4	13.3	100.0
CHILDREN	19.3	6.2	5.6	39.4	70.5	20.1	9.4	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 28th DECEMBER 2003

	<u>ITV1</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 Individuals	29.1	9.0	6.3	18.4	62.8	27.2	10.1	100.0
All Adults	29.5	9.2	6.4	17.2	62.3	27.7	10.1	100.0
16-34	24.2	12.3	6.4	24.6	67.5	23.3	9.2	100.0
35-54	27.6	9.2	6.5	20.9	64.2	26.0	9.9	100.0
55+	34.1	7.4	6.3	9.6	57.4	31.8	11.0	100.0
ABC1	25.8	10.6	5.5	16.6	58.5	29.7	11.8	100.0
C2DE	32.3	8.0	7.1	17.6	65.0	26.2	8.8	100.0
16-34 ABC1	21.8	14.2	6.1	22.6	64.7	24.5	10.9	100.0
35-54 ABC1	24.9	10.5	5.8	19.7	60.9	27.8	11.4	100.0
55+ ABC1	29.7	8.3	4.6	9.0	51.6	35.4	13.0	100.0
16-34 C2DE	26.4	10.7	6.7	26.4	70.2	22.2	7.7	100.0
35-54 C2DE	30.1	8.0	7.2	22.0	67.3	24.3	8.5	100.0
55+ C2DE	36.8	6.7	7.3	10.0	60.8	29.5	9.7	100.0
CHILDREN	25.4	7.1	5.8	30.3	68.6	22.2	9.4	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 28th DECEMBER 2003

	<u>ITV1</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 Platforms	23.7	9.5	6.3	24.3	63.8	25.2	11.0	100.0
Dig-sat	18.1	5.9	3.7	49.3	77.0	17.4	5.6	100.0
Dig-cable	18.8	6.4	5.1	46.0	76.3	17.5	6.2	100.0
Dig-terr	24.3	10.0	8.0	17.3	59.6	27.9	12.5	100.0
Total dig	19.2	6.6	4.7	43.7	74.2	19.0	6.8	100.0
Anlg-cable	18.2	5.9	6.6	48.3	79.0	15.0	6.0	100.0
Anlg terr	30.2	13.0	7.9	0.0	51.1	33.3	15.6	100.0
Total anlg	29.6	12.7	7.9	1.8	52.0	32.7	15.3	100.0

PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platform
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	10	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
01.04.03	6,372	2,156	1,398	9,718	15,101	1,222	13,647	24,772
	25.7	8.7	5.6	39.2	61.0	4.9	55.1	100
01.07.03	6,470	2,156	1,510	9,928	14,930	1,122	13,576	24,811
	26.1	8.7	6.1	40.0	60.2	4.5	54.7	100
01.10.03	6,600	2,250	1,710	10,354	14,544	1,010	13,303	24,857
	26.6	9.1	6.9	41.7	58.5	4.1	53.5	100
01.01.04	6,785	2,326	2,075	10,961	13,688	951	12,576	24,612
	27.6	9.5	8.4	44.5	55.6	3.9	51.1	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.

TABLE 7

AVERAGE WEEKLY PATRONAGE*

CONSOLIDATED DATA

ALL INDIVIDUALS

	<u>ITV1</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							
July	81.8	72.6	48.2	<i>38.4</i>	86.0	72.8	<i>92.7</i>
August	79.8	69.9	48.9	<i>37.8</i>	84.4	72.3	<i>91.0</i>
September	82.6	72.5	49.1	<i>39.1</i>	87.4	74.6	<i>92.8</i>
October	83.5	74.1	50.7	<i>39.5</i>	88.3	75.5	<i>93.7</i>
November	85.2	74.8	52.3	<i>40.1</i>	88.6	77.5	<i>94.2</i>
December	85.2	73.4	49.8	<i>39.6</i>	87.8	75.4	<i>93.0</i>
2002							
January	83.1	73.7	48.9	<i>38.4</i>	85.3	75.6	<i>91.1</i>
February	85.7	76.3	52.0	<i>41.3</i>	87.2	77.2	<i>93.5</i>
March	84.2	73.8	50.0	<i>41.1</i>	85.5	76.6	<i>92.9</i>
April	81.3	70.0	49.0	<i>40.6</i>	82.2	71.4	<i>90.0</i>
May	80.3	70.2	48.6	<i>40.1</i>	83.3	71.9	<i>89.5</i>
June	82.9	73.1	49.9	<i>40.4</i>	85.8	73.4	<i>91.1</i>
July	81.6	75.0	50.1	<i>41.8</i>	84.8	74.5	<i>91.9</i>
August	81.1	70.2	48.0	<i>41.1</i>	83.8	73.1	<i>90.5</i>
September	83.4	70.2	50.4	<i>42.3</i>	85.8	74.2	<i>92.2</i>
October	84.0	72.7	52.9	<i>42.5</i>	87.4	77.8	<i>92.9</i>
November	85.5	76.1	53.0	<i>43.3</i>	88.2	78.9	<i>93.3</i>
December	85.6	76.1	51.2	<i>44.3</i>	88.6	77.5	<i>93.8</i>
2003							
January	86.3	76.1	51.7	<i>44.5</i>	88.9	79.3	<i>94.0</i>
February	86.9	76.7	54.3	<i>46.2</i>	89.9	79.3	<i>95.3</i>
March	85.4	73.7	52.3	<i>46.9</i>	89.5	77.8	<i>95.4</i>
April	85.9	74.1	52.0	<i>46.9</i>	88.5	77.0	<i>94.7</i>
May	85.5	74.3	52.4	<i>47.0</i>	87.8	76.1	<i>94.8</i>
June	82.5	73.1	50.7	<i>45.9</i>	86.7	73.7	<i>93.9</i>
July	81.8	72.3	50.8	<i>44.8</i>	85.4	73.4	<i>92.8</i>
August	81.5	70.1	49.4	<i>45.0</i>	84.7	73.4	<i>91.9</i>
September	84.2	72.0	54.2	<i>46.5</i>	87.4	75.2	<i>93.9</i>
October	85.9	74.1	55.4	<i>47.5</i>	88.3	76.3	<i>94.4</i>
November	86.8	75.8	56.0	<i>48.3</i>	89.1	78.5	<i>95.1</i>
December	86.4	75.3	52.3	<i>49.8</i>	89.8	78.4	<i>95.1</i>

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