



## **TRENDS IN TELEVISION VIEWING**

**QTR 4 2008**

**Published February 2009**

## **SUMMARY FOR QUARTER 4 2008**

**Average daily hours of viewing for the last quarter of 2008 stood at 3.88 hours for each individual, this is the highest recorded viewing figure for this quarter since 2004. (Table 1)**

**The non-terrestrial channels are close to achieving a 40% share of viewing. (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)**

**Digital reception continues to grow now standing at 86% of all homes- the greatest growth was in digital terrestrial which now stands at 54%. (Table 4)**

**Patronage levels for five are higher than a year ago, whilst BBC1, BBC2, ITV and Channel 4 show a decline over the year. Patronage of the non-terrestrial channels has now established itself firmly at over 75%. (Table 5)**

**Table 6 shows channel shares accumulated by broadcasting company. The BBC's share stands at 33.4%, slightly down on the quarter. Table 7 shows channel impact shares accumulated by the sales houses representing them.**

**We have slightly simplified this report, omitting the table showing individual weeks, and the demographic table showing only peak time shares.**

**The patronage table is now based on quarters – in line with the rest of this report – instead of months.**

**Most trend data in this report are 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.**

**TABLE 1:**

**AVERAGE DAILY HOURS OF VIEWING - ALL TV**

**ALL INDIVIDUALS**

	<b>Qtr 1</b>	<b>Qtr 2</b>	<b>Qtr 3</b>	<b>Qtr 4</b>	<b>FULL YEAR</b>
<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

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 1	22.4	9.4	20.6	10.0		5.9	68.4	31.6	100.0	
2006 - Qtr 2	23.5	8.6	19.9	10.4		5.7	68.0	32.0	100.0	
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

**TABLE 3:**

**CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME**

**ALL INDIVIDUALS - 13 W/E 28th DECEMBER 2008**

	TERRESTRIAL						NON-TERRESTRIAL	TOTAL
	BBC1	BBC2	ITV + GMTV	CH 4/4+1	Five	TOTAL	%	%
	%	%	%	%	%	%		
All Individuals	21.6	8.0	18.8	7.7	4.9	61.0	39.0	100.0
All Adults	22.6	8.4	19.3	7.9	5.0	63.1	36.9	100.0
Men	22.2	8.9	16.5	7.6	4.9	60.1	39.9	100.0
Women	22.9	7.9	21.5	8.1	5.1	65.5	34.5	100.0
Housewives	23.5	8.6	20.5	8.1	5.3	66.1	33.9	100.0
HW with children	16.4	5.1	18.6	7.6	4.7	52.4	47.6	100.0
16-34	14.0	5.7	15.1	8.9	4.2	47.9	52.1	100.0
35-54	20.0	7.3	18.6	7.7	4.9	58.5	41.5	100.0
55+	29.1	10.6	22.0	7.5	5.5	74.7	25.3	100.0
ABC1	24.4	9.3	16.9	7.6	4.0	62.4	37.6	100.0
C2DE	21.2	7.6	21.1	8.0	5.8	63.7	36.3	100.0
16-34 ABC1	15.8	7.0	14.7	9.0	3.8	50.3	49.7	100.0
35-54 ABC1	21.6	8.2	17.3	7.5	4.1	58.6	41.4	100.0
55+ ABC1	32.4	11.8	18.0	7.0	4.2	73.4	26.6	100.0
16-34 C2DE	12.5	4.6	15.4	8.8	4.6	45.8	54.2	100.0
35-54 C2DE	18.7	6.5	19.8	7.9	5.7	58.5	41.5	100.0
55+ C2DE	27.0	9.8	24.6	7.8	6.3	75.5	24.5	100.0
CHILDREN	11.9	4.5	14.0	6.6	3.7	40.7	59.3	100.0

TABLE 4:

## PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	Total anlg	Anlg cable	Anlg terr	All Platforms
01.10.05	7751	2649	5316	<b>15149</b>	<b>9922</b>	652	9153	24996
	31.0	10.6	21.3	<b>60.6</b>	<b>39.7</b>	2.6	36.6	100.0
01.01.06	7815	2703	6363	<b>16162</b>	<b>9060</b>	594	8349	25164
	31.1	10.7	25.3	<b>64.2</b>	<b>36.0</b>	2.4	33.2	100.0
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

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					NON- TERRESTRIAL	ANY TV AT ALL
		TERRESTRIAL						
		BBC1	BBC2	ITV + GMTV	CH 4	Five		
		%	%	%	%	%	%	%
2002	Qtr 3	84.7	73.9	81.9	71.7	49.4	41.6	91.5
	Qtr 4	88.0	78.1	84.9	74.8	52.4	43.3	93.3
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

\* 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>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</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		
2006 - Qtr 4	34.3	65.8	23.7	11.0	6.1	7.1	3.2	2.1	1.2	11.4
2007 - Qtr 1	34.0	66.0	23.1	12.3	6.1	6.6	3.1	2.2	1.2	11.4
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

\*\* From Nov 2005

\*\*\* from Oct 2005



**TABLE 7:**

**TRENDS IN IMPACTS SHARE BY SALES HOUSE**

	<b>ITV1</b>	<b>Other ITV</b>	<b>GMTV</b>	<b>CH 4</b>	<b>Five</b>	<b>BSkyB</b>	<b>IDS</b>	<b>All others</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<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>				
2006 - Qtr 4	32.5	6.8	2.2	16.8	10.2	13.6	9.8	8.1
2007 - Qtr 1	31.6	6.2	2.3	19.3	10.2	12.9	9.8	7.7
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	12.7	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

\*\* From Nov 2005

\*\*\* from Oct 2005