

## SUMMARY

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Average daily hours of television rose to 3.94 hours in the last quarter of 2009 – a 1.5% year on year increase. This contributed to an overall annual figure for 2009 of 3.75 hours – the highest level recorded during the course of the BARB 2002-2009 contract. (Table 1)

In terms of share of viewing, ITV+ GMTV increased their combined share of viewing to 19% - their highest recorded level for two years. (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 to accelerate with digital terrestrial penetration increasing from 59.6% to 65.1% over the quarter Homes relying solely on analogue terrestrial signals are now down to 7.4%. (Table 4)

All channels recorded increases in patronage levels this quarter. (Table 5)

Table 6 shows 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 are confined to the period of the current BARB contract, however, some data are shown from the previous contract period to provide a historical context. Care should be taken in comparing data from the two different panels. A new BARB panel came into operation on the 1<sup>st</sup> of January 2010, this again will bring some discontinuity to the data in any subsequent reports.



## **TRENDS IN TELEVISION VIEWING**

**Quarter 4 2009**

**Published: February 2010**

**TABLE 1: AVERAGE DAILY HOURS OF VIEWING - ALL TV**

		<b>ALL INDIVIDUALS</b>				
		<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
<b>NEW PANEL</b>						
	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
	<b>2009</b>	<b>3.96</b>	<b>3.56</b>	<b>3.54</b>	<b>3.94</b>	<b>3.75</b>

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 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
2009 - Qtr 4	21.0	7.3	19.0	6.2	0.6	4.6	58.8	41.2	100.0	62.7

**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	21.0	7.3	19.0	6.9	4.6	58.8	41.2	100.0
All Adults	22.1	7.7	19.5	7.0	4.7	60.9	39.1	100.0
Men	22.0	8.1	16.5	6.6	4.5	57.8	42.2	100.0
Women	22.1	7.3	22.0	7.3	4.9	63.5	36.5	100.0
Housewives	22.9	8.0	20.9	7.3	5.1	64.2	35.8	100.0
HW with children	15.9	4.6	20.1	7.0	4.9	52.4	47.6	100.0
16-34	13.8	4.7	16.1	8.0	4.2	46.8	53.2	100.0
35-54	19.3	6.5	19.2	6.7	4.7	56.5	43.5	100.0
55+	28.4	10.1	21.4	6.7	5.0	71.6	28.4	100.0
ABC1	23.9	8.8	17.1	7.0	3.9	60.8	39.2	100.0
C2DE	20.6	6.8	21.3	7.0	5.3	61.0	39.0	100.0
16-34 ABC1	16.0	5.8	15.0	8.2	3.9	49.0	51.0	100.0
35-54 ABC1	21.3	7.6	18.0	6.8	4.0	57.6	42.4	100.0
55+ ABC1	31.2	11.7	17.6	6.6	3.8	70.9	29.1	100.0
16-34 C2DE	11.9	3.8	17.0	7.9	4.4	45.0	55.0	100.0
35-54 C2DE	17.5	5.6	20.4	6.6	5.3	55.5	44.5	100.0
55+ C2DE	26.6	9.0	23.9	6.8	5.8	72.1	27.9	100.0
CHILDREN	11.1	3.7	14.4	5.8	3.9	38.8	61.2	100.0

**TABLE 4: PLATFORM UNIVERSES - HOMES**

	<b>Dig-sat</b>	<b>Dig-cable</b>	<b>Dig-terr</b>	<b>Total dig</b>	<b>Total anlg</b>	<b>Anlg cable</b>	<b>Anlg terr</b>	<b>All Platforms</b>
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
01.04.09	9530	3465	14292	<b>22483</b>	<b>3616</b>	120	3388	25996
	36.7	13.3	55.0	<b>86.5</b>	<b>13.9</b>	0.5	13.0	100.0
01.07.09	9738	3497	14735	<b>22763</b>	<b>3395</b>	132	3155	26062
	37.4	13.4	56.5	<b>87.3</b>	<b>13.0</b>	0.5	12.1	100.0
01.10.09	9966	3543	15562	<b>23542</b>	<b>2643</b>	117	2418	26127
	38.1	13.6	59.6	<b>90.1</b>	<b>10.1</b>	0.4	9.3	100.0
01.01.10	10262	3664	16882	<b>23831</b>	<b>2136</b>	119	1909	25950
	39.5	14.1	65.1	<b>91.8</b>	<b>8.2</b>	0.5	7.4	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
Qtr 4	84.0	65.6	78.5	65.4	51.3	84.6	94.5

\* 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**

	<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>
	%	%	%	%	%	%	%	%	%	%
<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		
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
2009 - Qtr 4	32.7	67.3	24.5	10.5	<b>5.8</b>	6.6	3.7	2.4	1.2	12.6

\*\*\* 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>				
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
2009 - Qtr 4	29.4	9.3	1.8	17.1	9.7	13.7	10.8	8.1

\*\*\* from Oct 2005