



TRENDS IN TELEVISION VIEWING

QUARTER 3 2002

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Summary

This is the third issue of Trends in Television since the start of the new BARB panel in January 2002.

As before, some data is shown from the previous BARB 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. (Table 1)

ITV's share of viewing continues its slow decline, while non-terrestrial channels resume their growth. Channel Four has enjoyed a good quarter with a 10.4% share, and BBC1 has slipped back a little after the boost given to last quarter's performance by the World Cup. Table (2/3)

Demographically, channel performances retain much the same pattern as they have held for some time now. (Table 4)

For most channels, recorded patronage levels are a little higher than a year ago, this is a reversal in long term trends but may well be an effect of moving from the old BARB panel to the new. (Table 7)

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>#</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		

NOTES: 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 CHANNEL SHARE

ALL INDIVIDUALS

	<u>ITV</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>
	%	%	%	%	%	%	%	%
2001 - Qtr 1	29.3	10.0	5.5	17.7	62.5	27.0	10.6	100.0
	<i>46.9</i>	<i>16.0</i>	<i>8.8</i>	<i>28.3</i>	<i>100.0</i>			
2001 - Qtr 2	28.9	9.7	5.6	17.8	62.0	26.5	11.5	100.0
	<i>46.6</i>	<i>15.7</i>	<i>9.0</i>	<i>28.7</i>	<i>100.0</i>			
2001 - Qtr 3	27.1	10.5	5.7	19.4	62.7	26.5	10.7	100.0
	<i>43.2</i>	<i>16.7</i>	<i>9.1</i>	<i>31.0</i>	<i>100.0</i>			
2001 - Qtr 4	25.2	10.0	6.0	21.1	62.2	26.8	11.0	100.0
	<i>40.5</i>	<i>16.1</i>	<i>9.6</i>	<i>33.8</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>			

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

TABLE 3

WEEKLY CHANNEL SHARES - THIS QUARTER

ALL INDIVIDUALS

Week Ending:-	<u>ITV</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> %
07.07.02	22.0 35.5	11.9 19.2	6.7 10.8	21.3 34.4	61.9 100.0	27.4	10.7	100.0
14.07.02	22.9 35.8	12.6 19.7	6.1 9.5	22.3 34.9	63.9 100.0	24.8	11.3	100.0
21.07.02	22.4 35.0	13.1 20.5	6.3 9.8	22.2 34.7	64.0 100.0	24.5	11.6	100.0
28.07.02	21.9 34.4	13.8 21.7	6.2 9.7	21.7 34.1	63.6 100.0	25.2	11.2	100.0
04.08.02	22.9 37.2	9.8 15.9	6.4 10.4	22.5 36.5	61.6 100.0	26.2	12.2	100.0
11.08.02	23.5 37.4	9.7 15.4	6.4 10.2	23.3 37.0	62.9 100.0	25.6	11.5	100.0
18.08.02	24.1 38.0	9.8 15.4	5.6 8.8	24.0 37.8	63.5 100.0	25.1	11.3	100.0
25.08.02	24.0 38.5	9.5 15.2	5.9 9.5	23.0 36.9	62.4 100.0	25.7	11.9	100.0
01.09.02	23.8 37.5	10.0 15.8	6.2 9.8	23.4 36.9	63.4 100.0	25.3	11.3	100.0
08.09.02	25.7 40.9	9.3 14.8	5.8 9.2	22.1 35.1	62.9 100.0	25.5	11.6	100.0
15.09.02	24.7 39.6	8.8 14.1	6.5 10.4	22.4 35.9	62.4 100.0	26.5	11.1	100.0
22.09.02	24.5 38.8	9.0 14.3	6.6 10.5	23.0 36.5	63.1 100.0	25.9	11.0	100.0
29.09.02	24.3 38.9	8.1 13.0	6.8 10.9	23.2 37.2	62.4 100.0	26.8	10.9	100.0

TABLE 4

CHANNEL SHARES BY DEMOGRAPHICS - ALL TIME

ALL INDIVIDUALS - 13 W/E 29th SEPTEMBER 2002

	<u>ITV</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	23.6	10.4	6.3	22.6	62.9	25.7	11.3	100.0
All Adults	24.2	10.7	6.4	20.8	62.1	26.8	11.3	100.0
16-34	20.9	13.4	5.8	29.9	70.0	21.1	9.0	100.0
35-54	23.5	10.1	6.1	25.2	64.9	24.9	10.2	100.0
55+	26.9	9.5	7.0	10.7	54.1	32.1	13.8	100.0
ABC1	22.1	11.9	5.4	19.5	58.9	28.7	12.4	100.0
C2DE	25.5	10.0	7.0	21.6	64.1	25.5	10.5	100.0
16-34 ABC1	19.3	14.9	5.0	29.1	68.3	22.3	9.5	100.0
35-54 ABC1	22.3	11.4	5.4	22.1	61.2	27.2	11.7	100.0
55+ ABC1	24.5	10.0	5.8	8.5	48.8	35.6	15.6	100.0
16-34 C2DE	22.2	12.2	6.5	30.4	71.3	20.2	8.5	100.0
35-54 C2DE	24.4	9.2	6.6	27.5	67.7	23.1	9.1	100.0
55+ C2DE	28.1	9.3	7.7	11.9	57.0	30.2	12.8	100.0
CHILDREN	19.3	7.8	4.9	36.8	68.8	19.3	12.1	100.0

TABLE 5

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

ALL INDIVIDUALS - 13 W/E 29th SEPTEMBER 2002

	<u>ITV</u>	<u>CH 4</u>	<u>CH 5</u>	NON- <u>TERRESTRIAL</u>	TOTAL COMMERCIAL <u>+ NON-TERR.</u>	<u>BBC1</u>	<u>BBC2</u>	<u>TOTAL</u>
	%	%	%	%	%	%	%	%
All Individuals	29.3	9.7	6.3	16.6	61.9	27.6	10.5	100.0
All Adults	29.7	9.8	6.5	15.5	61.5	28.0	10.6	100.0
16-34	24.7	13.9	5.8	23.3	67.7	23.7	8.7	100.0
35-54	28.1	10.0	6.2	19.2	63.5	26.4	10.1	100.0
55+	34.0	7.1	7.1	7.8	56.0	31.9	12.2	100.0
ABC1	26.3	11.2	5.4	14.7	57.6	29.9	12.5	100.0
C2DE	32.1	8.7	7.2	16.2	64.2	26.6	9.2	100.0
16-34 ABC1	22.1	15.5	4.9	22.7	65.2	25.0	9.9	100.0
35-54 ABC1	25.7	11.4	5.4	16.9	59.4	28.3	12.3	100.0
55+ ABC1	30.1	7.7	5.9	6.4	50.1	35.2	14.7	100.0
16-34 C2DE	26.9	12.4	6.6	23.8	69.7	22.6	7.7	100.0
35-54 C2DE	30.1	8.8	6.9	21.1	66.9	24.8	8.3	100.0
55+ C2DE	36.3	6.8	7.8	8.6	59.5	30.0	10.6	100.0
CHILDREN	25.8	9.1	6.4	26.8	68.1	23.3	9.7	100.0

TABLE 6

CHANNEL SHARES BY PLATFORM - ALL TIME

ALL INDIVIDUALS - 13 W/E 29th SEPTEMBER 2002

	<u>ITV</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 Platforms	23.6	10.4	6.3	22.6	62.9	25.7	11.3	100.0
Dig-sat	17.4	6.8	3.7	48.2	76.1	18.0	5.9	100.0
Dig-cable	18.3	7.3	5.1	45.4	76.1	18.1	5.8	100.0
Dig-terr	25.0	11.8	9.4	12.5	58.7	29.7	11.6	100.0
Total dig	18.2	7.2	4.4	45.2	75.0	18.7	6.3	100.0
Anlg-cable	15.3	6.8	6.8	47.4	76.3	16.9	6.8	100.0
Anlg terr	29.9	13.5	7.5	0.1	51.0	33.3	15.7	100.0
Total anlg	28.9	13.1	7.5	3.1	52.6	32.3	15.1	100.0

PLATFORM UNIVERSES - HOMES

	Dig-sat	Dig-cable	Dig-terr	Total dig	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	2338.0	997	8905	15731	1310	14136	24570
	23.3	9.5	4.1	36.2	64.0	5.3	57.5	100
01.10.02	6,105	2292.0	763	9015	15645	1148	14265	24613
	24.8	9.3	3.1	36.6	63.6	4.7	58.0	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>ITV</u>	<u>CH 4</u>	<u>CH 5</u>	NON- <u>TERRESTRIAL</u>	<u>BBC1</u>	<u>BBC2</u>	ANY TV <u>AT ALL</u>
	%	%	%	%	%	%	%
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							
November							
December							

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