

Section C – PSB Viewing

PSB Report 2012 – Information pack
June 2012

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Background and notes

- This document reports industry recognised television viewing figures provided by BARB (Broadcasters' Audience Research Board) - a panel of 5,100 homes providing TV measurement for the industry.
- **In 2010 a new BARB panel was introduced. The effect of this is data pre and post 2010 are based on different viewer panels and refined geographic boundaries were introduced. As a result, data comparisons pre and post 2010 should be considered with caution.**
- Changes to the BARB reporting system in 2010 now also allow broadcasters to retrospectively amend the genre labelling of broadcasts they have aired. These changes will apply to all historic data for respective programmes/films. The effect of this is analysis within this report is based on a snapshot of data at a given point in time (i.e. when analysis was conducted). All analysis is based on data as of March/April 2012. *(Note: The BARB viewing figures use different datasets to the output figures in information pack C, which have slightly different programme classifications. The main differences are described in the Background and Methodology appendix).*
- Unless stated all analysis is based on whole days. Peak time is defined as 6pm to 10.30pm.
- Analysis focuses on viewing of the following PSB channels; that is BBC One, BBC Two, ITV1, Channel 4, S4C, Five, BBC Three, BBC Four, CBeebies, CBBC, BBC News, BBC Parliament and BBC HD. *(Note: Channel 4 data for 2006-2009 includes S4C viewing. Following DSO in Wales in 2010, Channel 4 data from 2010 onwards relates to viewing to Channel 4 only, i.e. S4C is excluded as it is now a separate channel)*
- The majority of the analysis focuses on total annual viewing hours for genres, which shows the total annual hours of viewing by an average individual (aged 4+) of a given programme genre. Unless indicated, figures show viewing averages for all viewers aged 4+, the standard demographic group for BARB analysis.

Definitions: Channel groups

| Main five PSB channels | BBC portfolio channels | Commercial PSBs' portfolio channels | |
|------------------------|------------------------|-------------------------------------|----------|
| BBC One (inc HD) | BBC3 | ITV1+1 | More4 |
| BBC Two | BBC4 | ITV2 (inc HD) | More4+1 |
| ITV1 (inc HD) | BBC HD | ITV2+1 | Film 4 |
| Channel 4 (inc HD) | BBC News | ITV3 (inc HD) | Film 4+1 |
| Five (inc HD) | BBC Parliament | ITV3+1 | 4Music |
| | Cbeebies | ITV4 (inc HD) | Five +1 |
| | CBBC | ITV4+1 | 5* |
| | | CITV | 5*+1 |
| | | Ch4+1 | 5 USA |
| | | E4 | 5 USA+1 |
| | | E4+1 | |

Channel 4 data for 2006-2009 includes S4C viewing. Following DSO in Wales in 2010, Channel 4 data from 2010 relates to viewing to Channel 4 only.

Definitions: All genres analysis

| Genre label | Definition – BARB genres |
|------------------------|--|
| National News/Weather | News: National/International Weather: National |
| Current Affairs | Current Affairs (All) |
| Other Factual | Hobbies/Leisure (All) Documentaries: Human Interest Documentaries: Factual Entertainment Documentaries: Crime/Real Life Documentaries: Travel Documentaries: Fly on the Wall Documentaries: Misc |
| Specialist Factual | Documentaries: Natural History & Nature Documentaries: Science/Medical Documentaries: History Documentaries: Factual Drama |
| Arts & Classical Music | Arts (All) Music: Classical - Documentary Music :Classical - General |
| Education | Education (All) |
| Religion | Religious (All) |

| Genre label | Definition – BARB genres |
|---------------|--|
| Drama | Drama: Series/Serials (All) Drama: Single Plays (All) |
| Soaps | Drama: Soaps (All) |
| Sport | Sport (All) |
| Entertainment | Entertainment (All) |
| Films | Films: Cinema (All) Films: Made for TV (All) Other Films (All) |
| Children's | Children's (All) |
| Other | Music: Miscellaneous Music: Contemporary Doc Music: Contemporary General Music: Contemporary Chart Show Music: Contemporary Performance/Live Party Political Broadcast (All) Other: New Programme News: Regional Weather: Regional |

Unless stated, analysis is based on 'Network' programming as defined by the use of the 'number of areas' filter (4+ areas)

Definitions: PSB genres analysis

| Genre label | Definition – BARB genres |
|--------------------|--|
| National News | News: National/International |
| Current Affairs | Current Affairs (All) |
| Other Factual | Hobbies/Leisure (All) Documentaries: Human Interest Documentaries: Factual Entertainment Documentaries: Crime/Real Life Documentaries: Travel Documentaries: Fly on the Wall Documentaries: Misc |
| Specialist Factual | Documentaries: Natural History & Nature Documentaries: Science/Medical Documentaries: History Documentaries: Factual Drama |

| Genre label | Definition – BARB genres |
|------------------------|--|
| Arts & Classical Music | Arts (All) Music: Classical Documentary Music :Classical General |
| Education | Education (All) |
| Religion | Religious (All) |
| UK Drama | Drama: Series/Serials -UK Drama: Single Plays -UK |
| UK Soaps | Drama: Soaps -UK |
| Sport | Sport (All) |
| UK Sitcom | Entertainment: Situation Comedy-UK |

Unless stated, analysis is based on 'Network' programming as defined by the use of the 'number of areas' filter (4+ areas)

Summary: Overview of hours watched

A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

Hours of viewing

- The average hours of total daily TV viewing increased between 2006 (3.6 hours) and 2011 (4.0 hours) – although year-on-year figures between 2010 and 2011 remained static (4.0 hours). The average hours of daily viewing to all PSB channels remained fairly stable over the same period. (See Figures 1 & 2)
- While Total TV viewing increased between 2006 and 2011 across all age groups, except 25-34 year olds, the greatest increase was seen between 2009 and 2010 – it is possible that part of this increase was attributable to effects of the BARB panel change. The greatest increases in viewing were among older viewers (55+) who also continue to be the heaviest television viewers. (See Figure 1).
- Viewing to PSB channels remained fairly stable between 2006 and 2011. The most marked change in viewing to these channels was among the 25-34 year olds, with their viewing falling from 2.0 hours in 2006 to 1.7 hours in 2011. (See Figure 2).
- When looking at the breakdown of Total TV viewing by channel groups, the main five PSB channels accounted for 2.2 hours of viewing per day, double the time spent watching Other multichannels. The BBC and Commercial PSB portfolio channels accounted for 0.8 hours of viewing per day, suggesting that taken together, any channels owned by the main five PSB channels accounted for 3.0 hours of viewing per day. (See Figure 3).

-PSB channels :BBC One, BBC Two, ITV1, Channel 4, S4C, Five, BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBBC and CBeebies.

Note: Channel 4 data for 2006-2009 includes S4C viewing. Following DSO in Wales in 2010, Channel 4 data from 2010 relates to viewing to Channel 4 only.

Summary: Overview of weekly reach

A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

Weekly reach*

- In multichannel homes, weekly reach for all BBC channels increased between 2006 and 2011; while ITV1, Channel 4 and Five all experienced some decline . (See Figure 4c).
- In multichannel homes, BBC One's weekly reach increased from 77% in 2006 to 79% in 2011; BBC Two saw an increase across this period, from 52% to 54%. ITV1's weekly reach declined marginally from 69% to 67%; while Channel 4 suffered the biggest decline – from 57% to 53%. Five's weekly reach also fell from 42% to 41%. (See Figure 4c).
- In multichannel homes, the average weekly reach of all of the PSB portfolio channels combined** increased from 60% in 2006 to 77% in 2011. The BBC, ITV and Channel 4 portfolio channels all reached between 45-49% of all viewers. (See Figure 5).
- Increased digital television penetration is likely to have been an important factor in the increase of reach of PSB portfolio channels, particularly the BBC channels - which are free-to-air across all multichannel platforms. (See Figure 5).

* Average weekly reach is defined as the proportion of the population that watched at least 15 consecutive minutes of a channel in an average week.

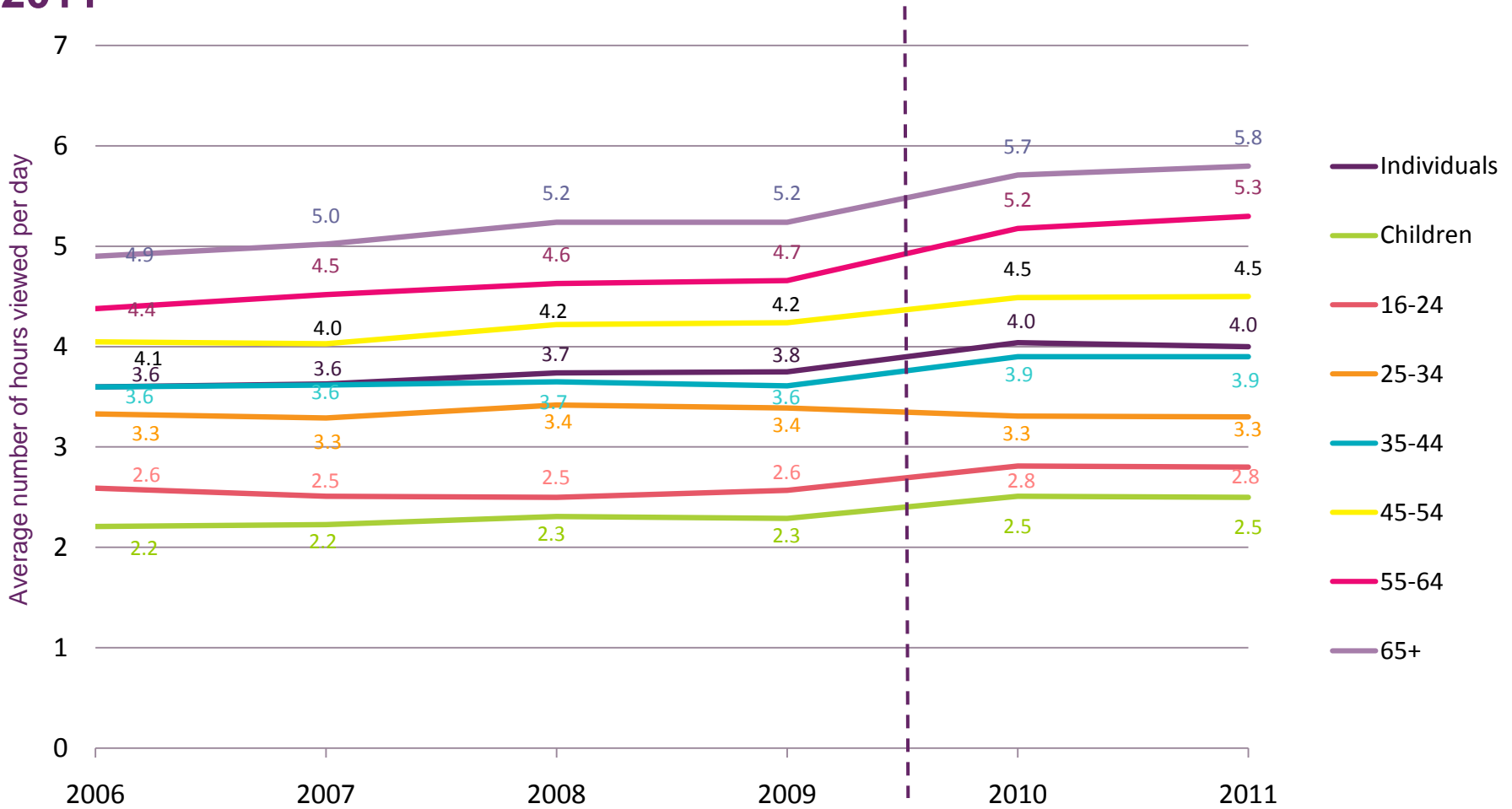
**Portfolio channels :BBC3, BBC4, BBC HD, BBC News, BBC Parliament, CBBC, CBeebies, ITV1+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, CH4+1, 4Music, E4 Total, More4 Total, Film4 Total, 5* Total, 5 USA Total.

-The actual number of channels that make up the PSB portfolios has increased over the years, and the proportion of people with multichannel television has also grown substantially year on year.

Overview of hours watched and reach



Fig 1 Average hours of daily viewing -Total TV, 2006-2011

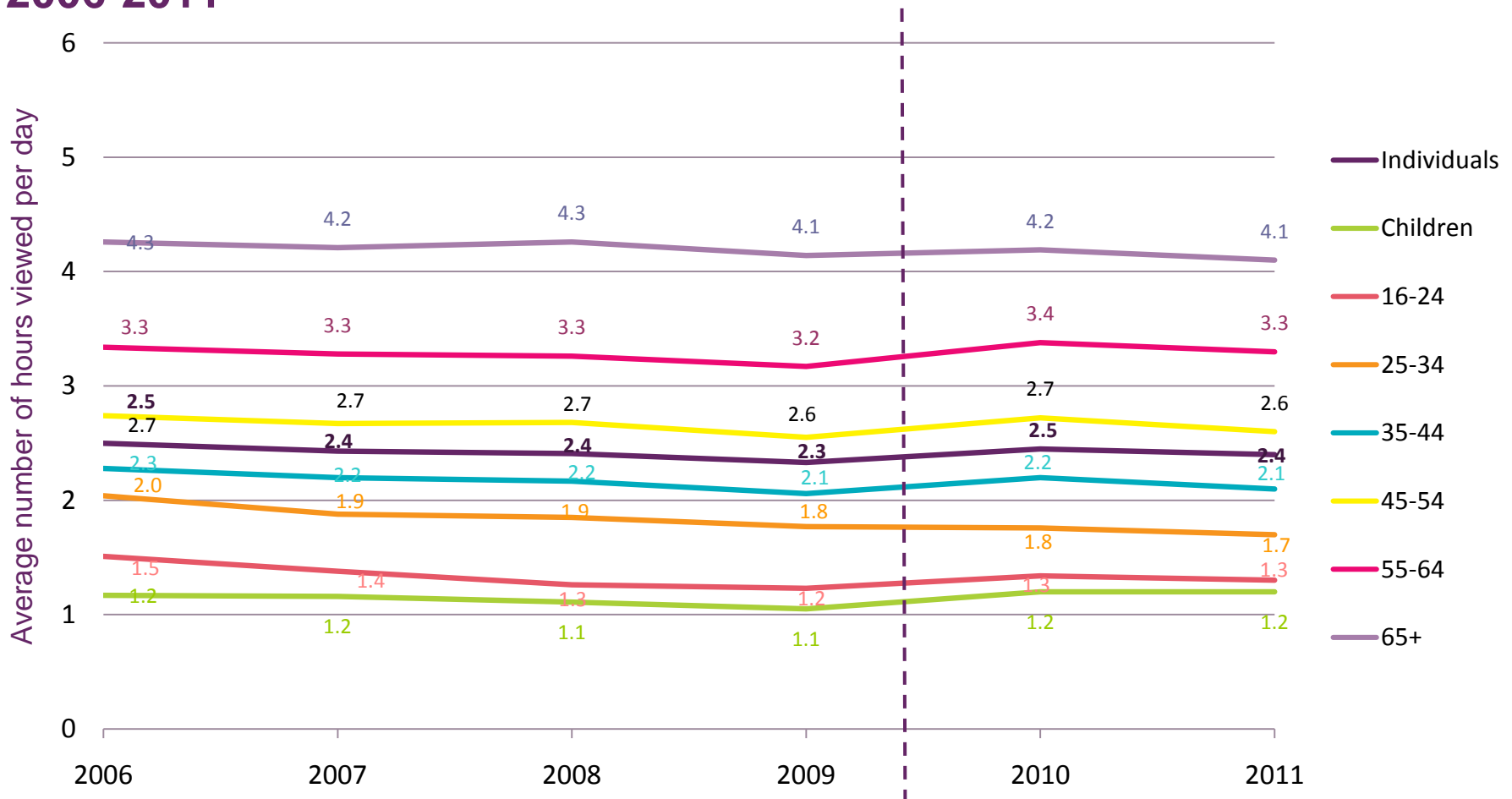


Source: BARB, All Individuals, Network. Individuals= 4+, Children= 4-15 years. Average hours of viewing per day, Total TV.
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Overview of hours watched and reach



Fig 2 Average hours of daily viewing - PSB channels, 2006-2011



Source: BARB, All Individuals, Network. Individuals= 4+, Children= 4-15 years. Average hours of viewing per day, PSB channels .

- PSB channels: BBC One, BBC Two, ITV1, C4, S4C, Five, BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, Cbeebies, CBBC

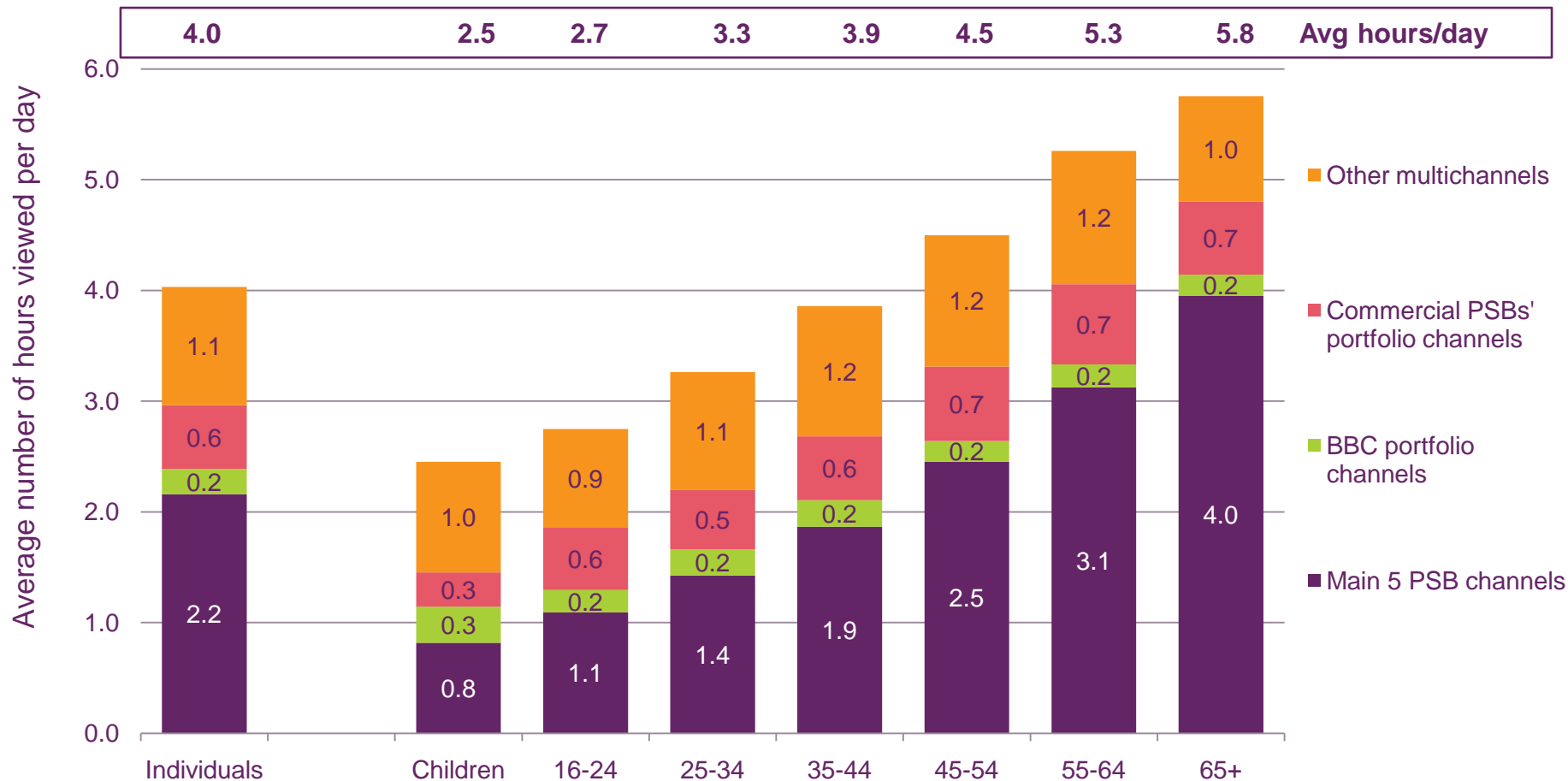
- C4 2006-09 includes S4C; from 2010 it is excluded as S4C became a separate channel following DSO in Wales.

- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Overview of hours watched and reach

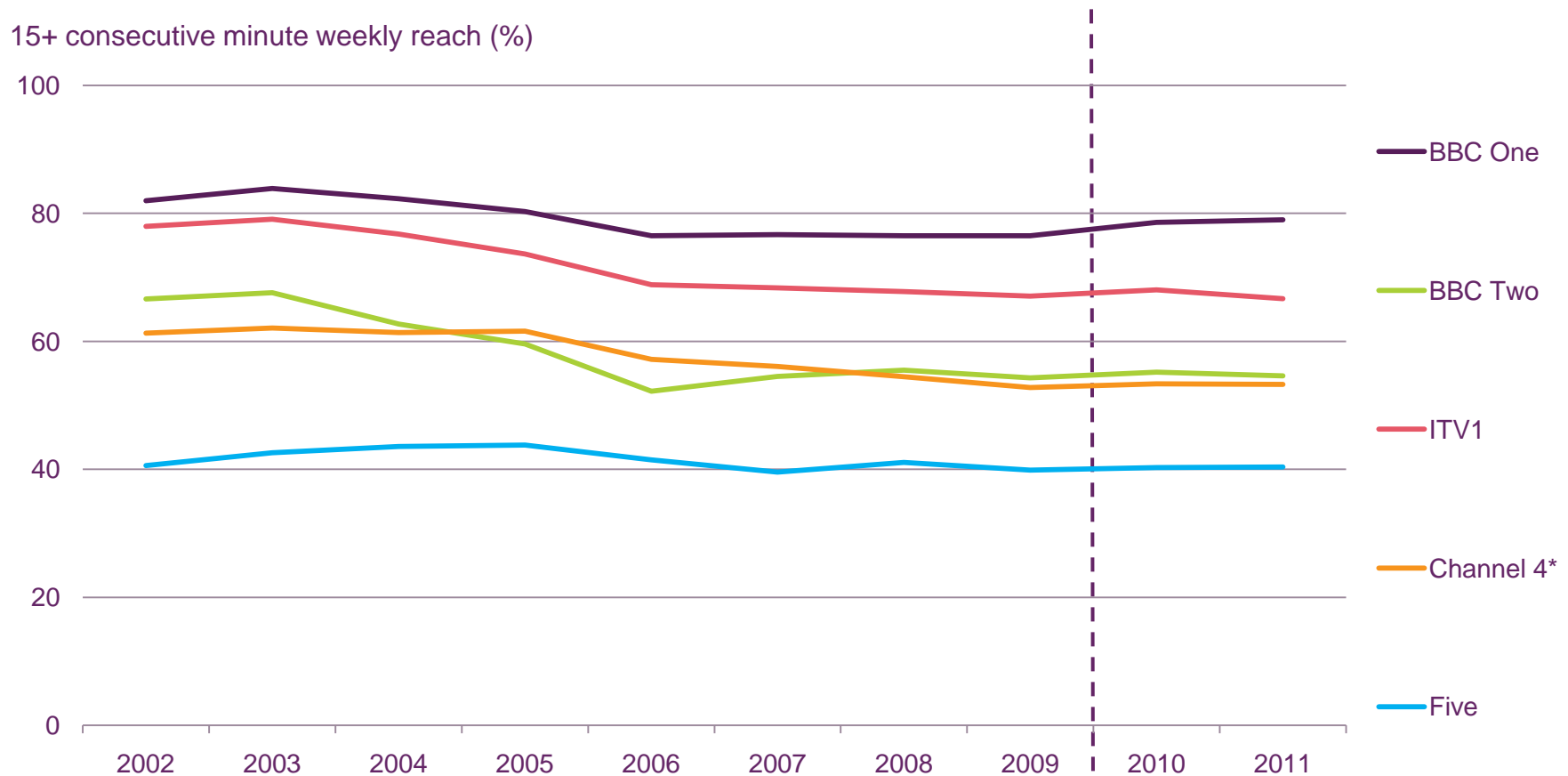


Fig 3 Average hours of daily viewing by age group, 2011



Source: BARB, All Individuals, Network. Individuals= 4+, Children= 4-15 years. Average hours of viewing per day, Total TV.

Fig 4a: Average weekly reach of the main PSB channels, all homes, 2002-2011



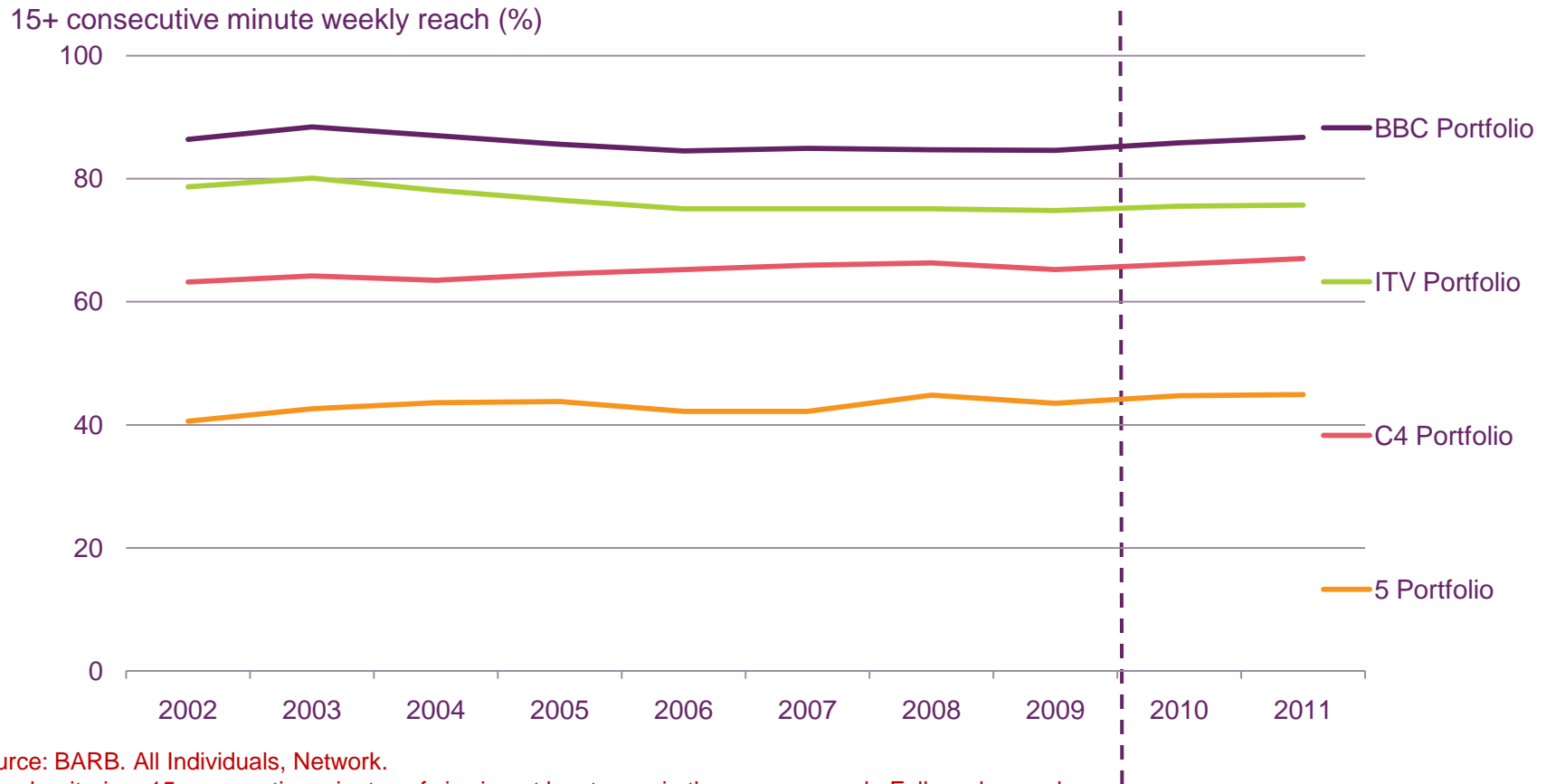
Source: BARB. All Individuals, Network.

- Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used.

- *C4 2006-09 includes S4C; from 2010 it is excluded as S4C became a separate channel following DSO in Wales. S4C weekly reach 2011 = 0.6%.

- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Fig 4b: Average weekly reach of PSB groups, 2002-2011.
All homes, includes the main PSB channels



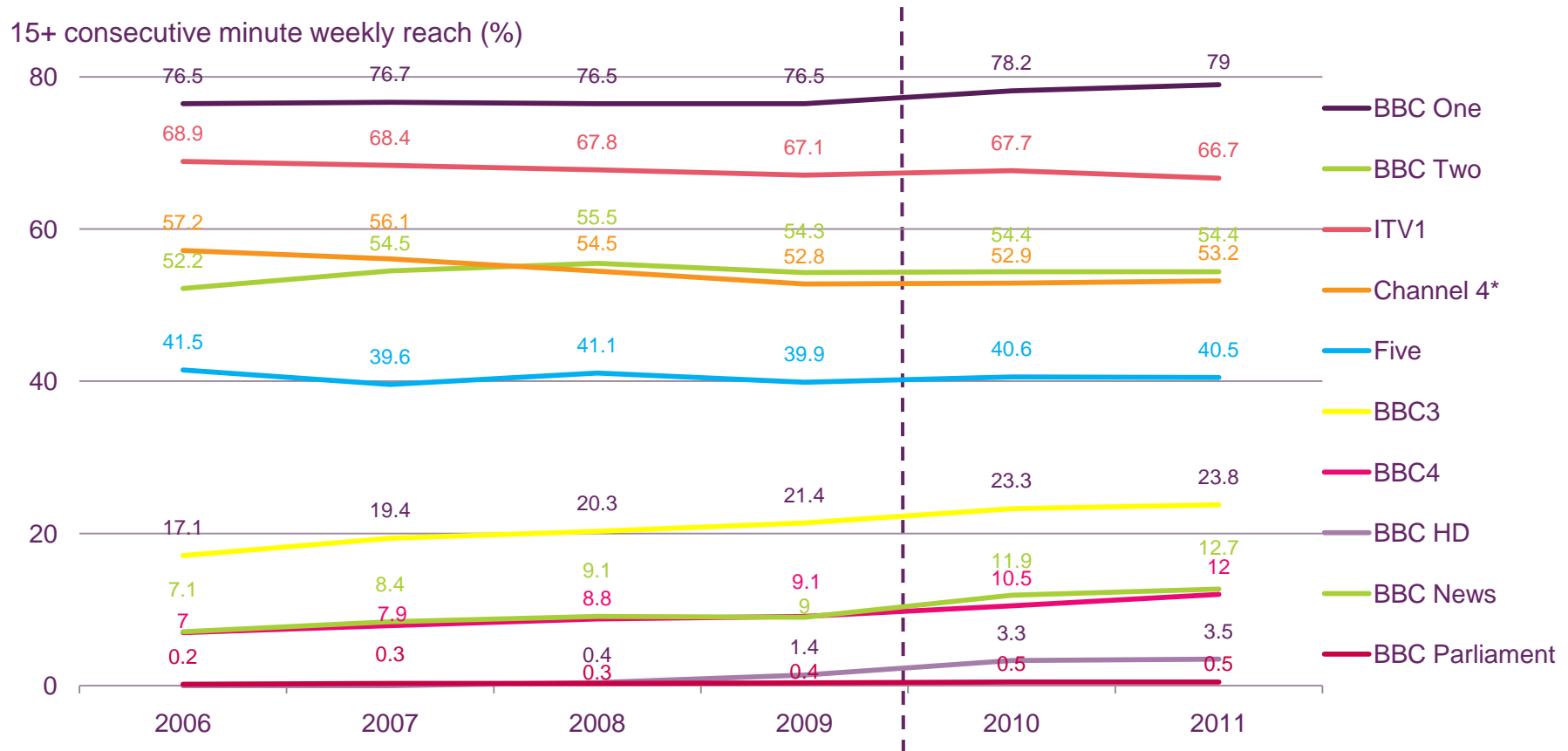
Source: BARB. All Individuals, Network.

-Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used.

-Portfolio channels: BBC3, BBC4, BBC HD, BBC News, BBC Parliament, CBBC, Cbeebies, ITV1+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, CH4+1, 4Music, E4 Total, More4 Total, Film4 Total, 5* Total, 5 USA Total

- The actual number of channels that make up the PSB portfolios has increased over the years, and the proportion of people with multichannel television has also grown substantially year on year. New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).

Fig 4c Average weekly reach of PSB channels – Multichannel homes, 2006-2011



Source: BARB. 2006-2009: All individuals, Multichannel universe/ 2010+: All individuals in multichannel homes, Network universe.

- Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used.

- *C4 2006-09 includes S4C; from 2010 it is excluded as S4C became a separate channel following DSO in Wales. S4C weekly reach 2011 = 0.6%.

- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Fig 5 Average weekly reach of the PSB portfolio digital channels – Multichannel homes, 2006 - 2011



Source: BARB. 2006-2009: All individuals, Multichannel universe/ 2010+: All individuals in multichannel homes, Network universe.

-Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used.

-Portfolio channels: BBC3, BBC4, BBC HD, BBC News, BBC Parliament, CBBC, Cbeebies, ITV1+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, CH4+1, 4Music, E4 Total, More4 Total, Film4 Total, 5* Total, 5 USA Total

- The actual number of channels that make up the PSB portfolios has increased over the years, and the proportion of people with multichannel television has also grown substantially year on year.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).

Summary: Overview of share



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- The combined share* of the main five PSB channels in all homes fell marginally from 55% in 2010 to 54% in 2011 - while most of the individual PSB channels saw their share remain flat, much of this decline was represented by the fall in ITV1's share from 17% to 16%. (See Figure 6).
- Similarly, within peak time (18:00-22:30), the main five PSB channels saw their shares either remain flat or decline by less than 1% from 2010 to 2011 – again, ITV1 experienced the greatest decline from 22% to 21%. (See Figure 7).
- The main five PSB channels combined with their respective portfolio channels accounted for 74% of all viewing across the day – rising to 79% during peak time. While shares vary across age groups, combined viewing to the main five PSB channels and their portfolio channels accounted for the majority of viewing amongst all - ranging from 59% among children to 83% among the 65+. (See Figures 8 & 9).
- Differences in viewing trends across age groups are further highlighted by looking at the number of channels that represented 75% of viewing for each group. The average individual's channel repertoire consisted of 24 channels – this ranged from 8 channels among those aged 65 or over, who spent 69% of their viewing time on the main five PSB channels, to 33 among children who spent over 40% of their viewing time watching Other multichannels. (See Figures 10).

*Share of viewing is the percentage of the total TV viewing audience watching over a given period of time.

-The actual number of channels that make up the PSB portfolios has increased over the years, and the proportion of people with multichannel television has also grown substantially year on year.

Summary: Overview of share



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

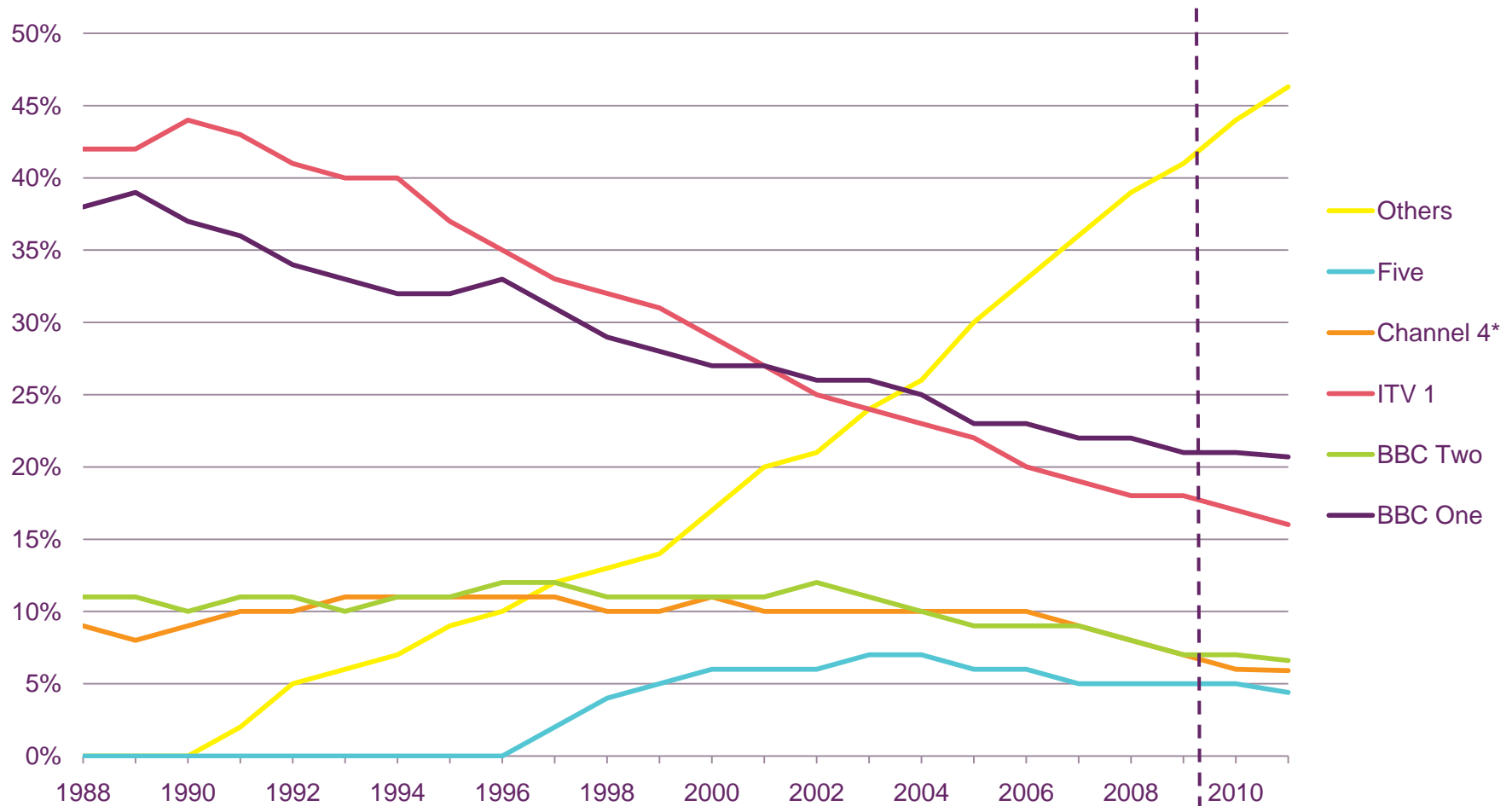
- While the main five PSB channels continued to maintain a higher share of viewing in Freeview only homes* (63% in 2011) compared with cable/satellite only homes (46%), this share remained fairly stable in cable/satellite only homes. In Freeview only homes there has been a steady decline in viewing to the main five PSB channels from 75% in 2006 to 63% in 2011 – a fall of 12 points. (See Figure 11).
- Looking back from 2011 to 2002, among multichannel viewers, there was a decrease in the combined share of viewing to the main five PSB channels from 58% in 2002 to 53% in 2011. This decline, however, was offset by an increase in the combined share of BBC and Commercial PSB portfolio channels from 6% in 2002 to 20% in 2011. As a result, despite the large increases in the number of channels broadcasting, PSB channels saw their total combined shares increase from 64% to 73%. Over the same period, share of viewing represented by Other multichannels decreased from 37% to 27%. (See Figure 12c).
- In recent years, as well as launching new channels, the PSBs have introduced variants of the main PSB channels such as HD and '+1' channels. Figures demonstrate that these variants are establishing strong channel share, particularly in the case of Channel 4+1 which has been operating since 2007. In December 2011, Channel 4 +1 added 1% to Channel 4's share. (See Figures 13-15).

*The number of channels on the Freeview platform has grown over this period.

-Portfolio channels: BBC3, BBC4, BBC HD, BBC News, BBC Parliament, CBBC, Cbeebies, ITV1+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, CH4+1,



Fig 6 All day channel shares in all homes, 1988 – 2011

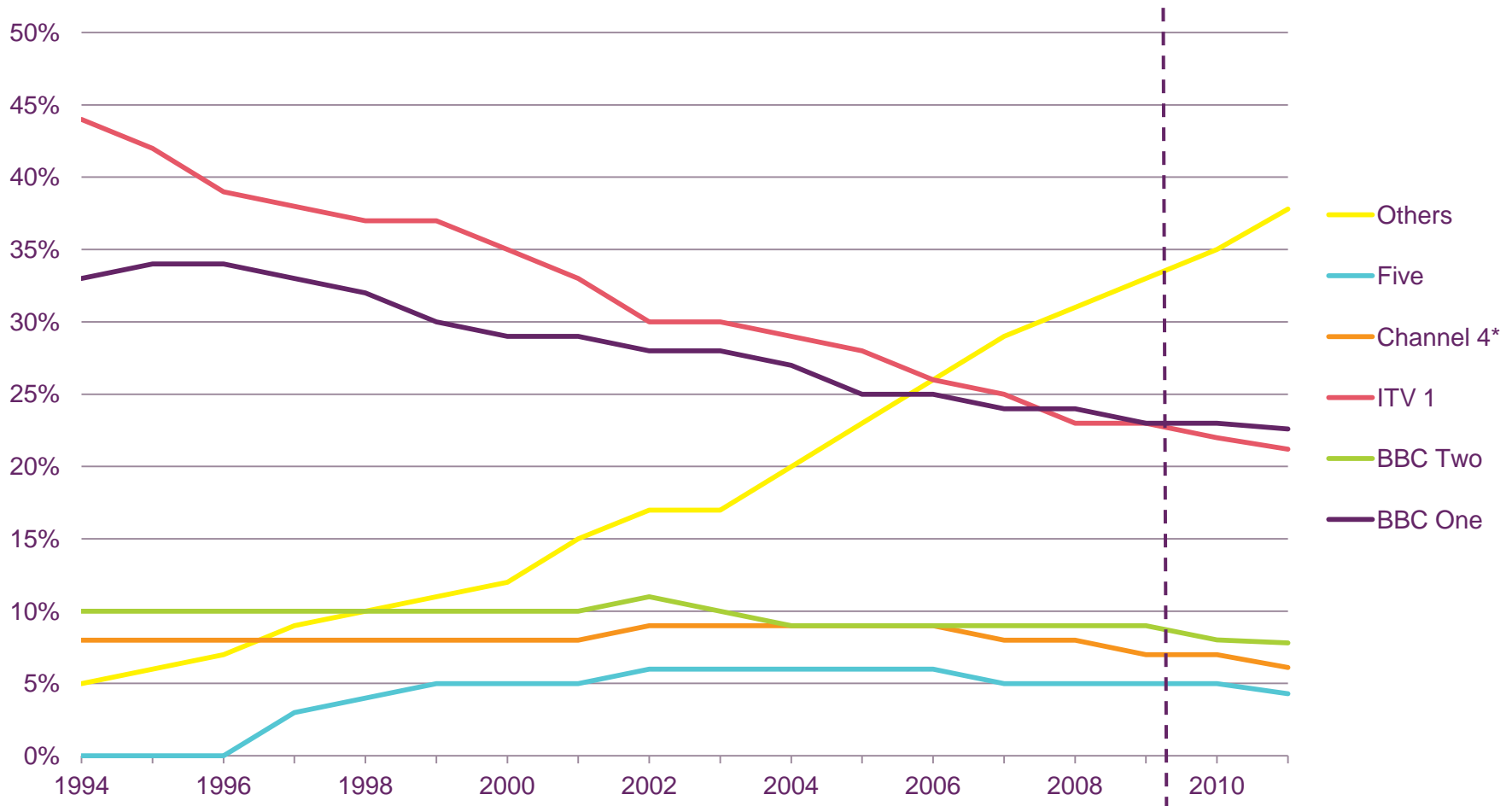


Source: BARB, All Individuals, Network.

-* C4 data 2006-09 includes S4C; from 2010 it is excluded as S4C became a separate channel following DSO in Wales. S4C 2011 share = 0.1%

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).

Fig 7 Peak time channel share in all homes, 1994 - 2011



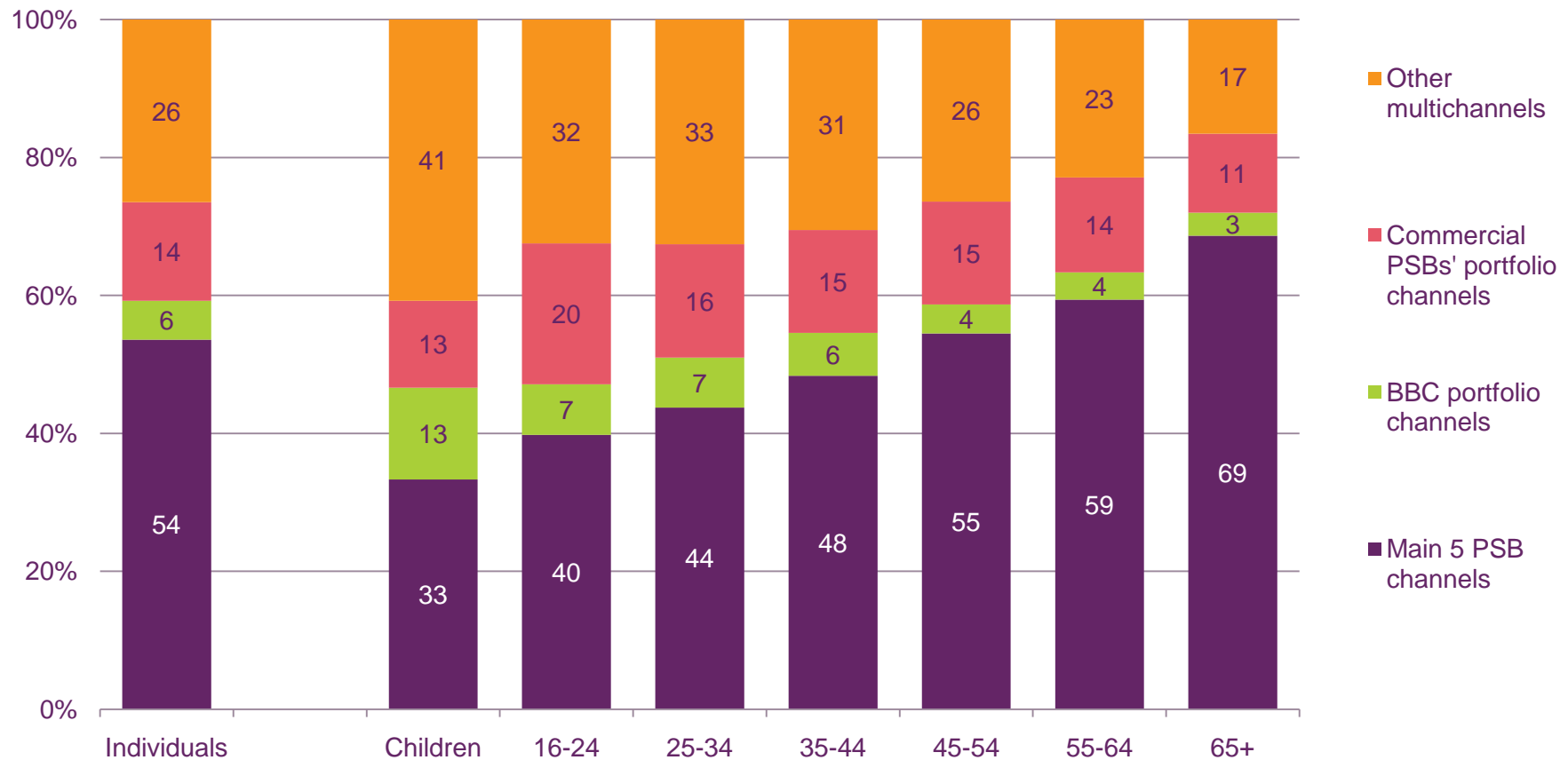
Source: BARB, All Individuals, Network. Peak time = 18:00-22:30

-*C4 2006-09 data includes S4C; from 2010 it is excluded as S4C became a separate channel following DSO in Wales. S4C 2011 peak share = 0.1%

- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).



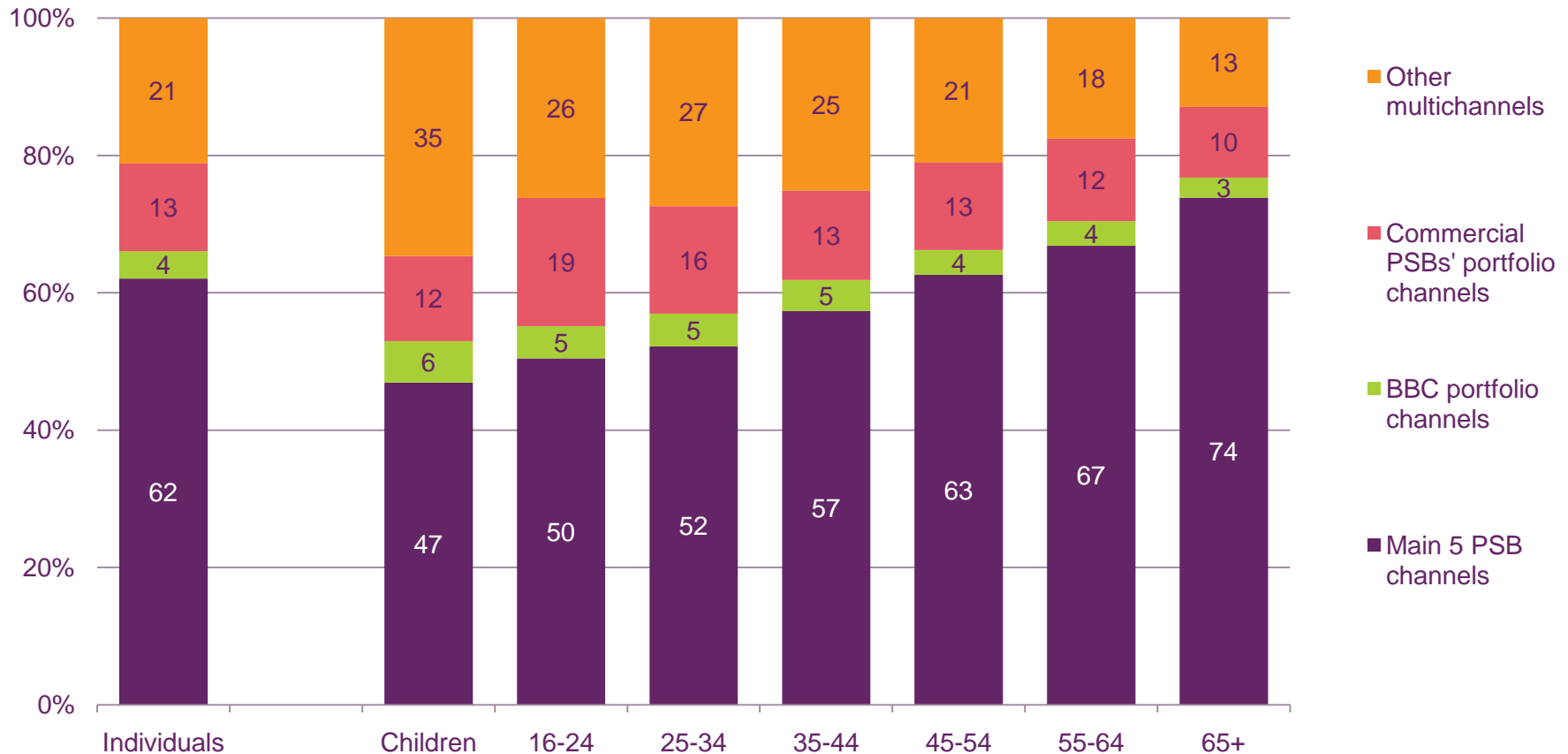
Fig 8 All day channel shares in all homes by channel group, 2011



Source: BARB, All Individuals, Network. Individuals= 4+, Children= 4-15 years.

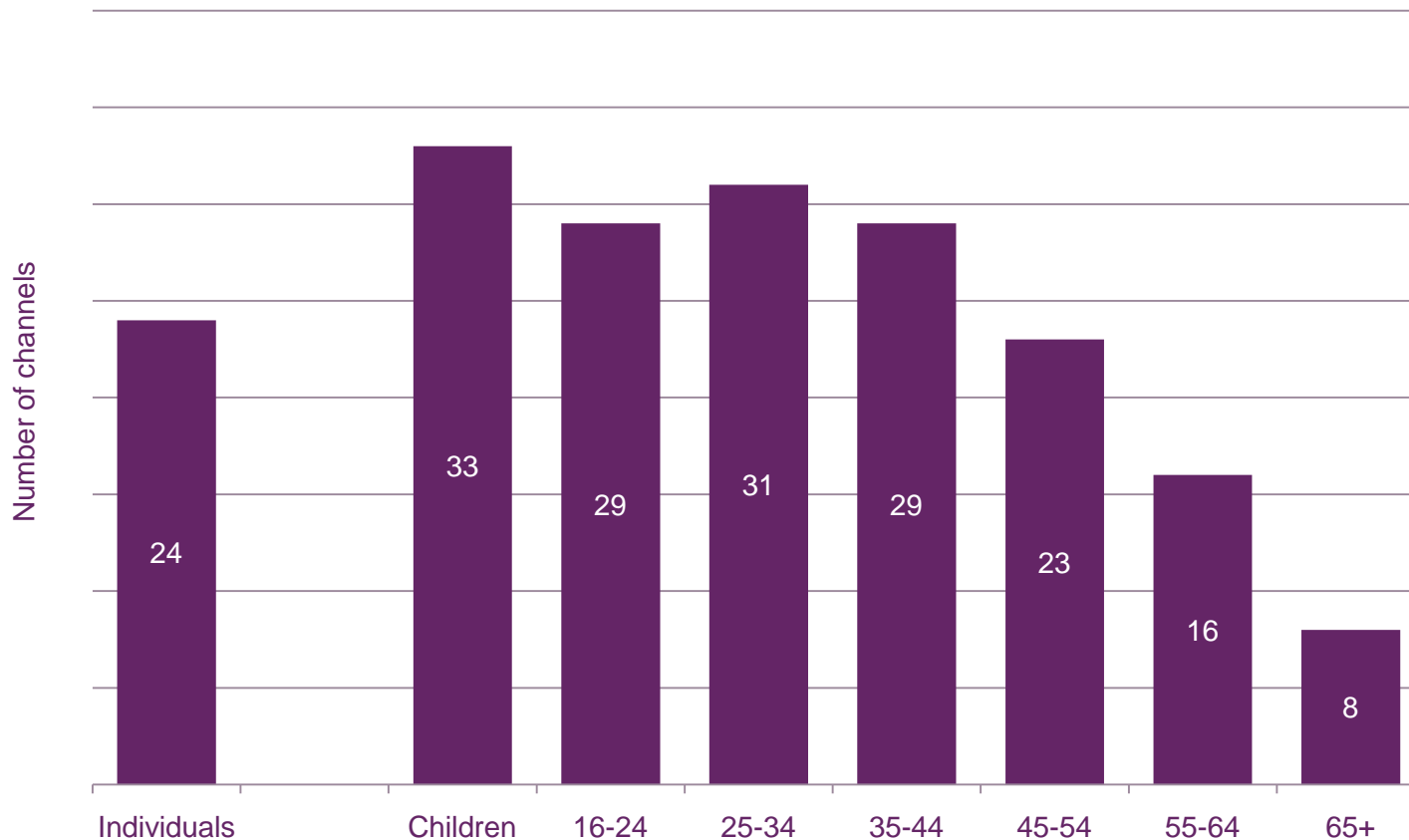


Fig 9 Peak time channel shares in all homes by channel group, 2011



Source: BARB, All Individuals, Network. Individuals= 4+, Children= 4-15 years. Peak time = 18:00-22:30

Fig 10 Number of channels representing 75% of viewing by age group, 2011



Source: BARB, All Individuals, Network. Individuals= 4+, Children= 4-15 years.

-Based on the number of channels representing 75% of each demographics viewing (channels ranked by channel share).

Fig 11 Main five PSB channels' share in homes with different television platforms, 2006-2011



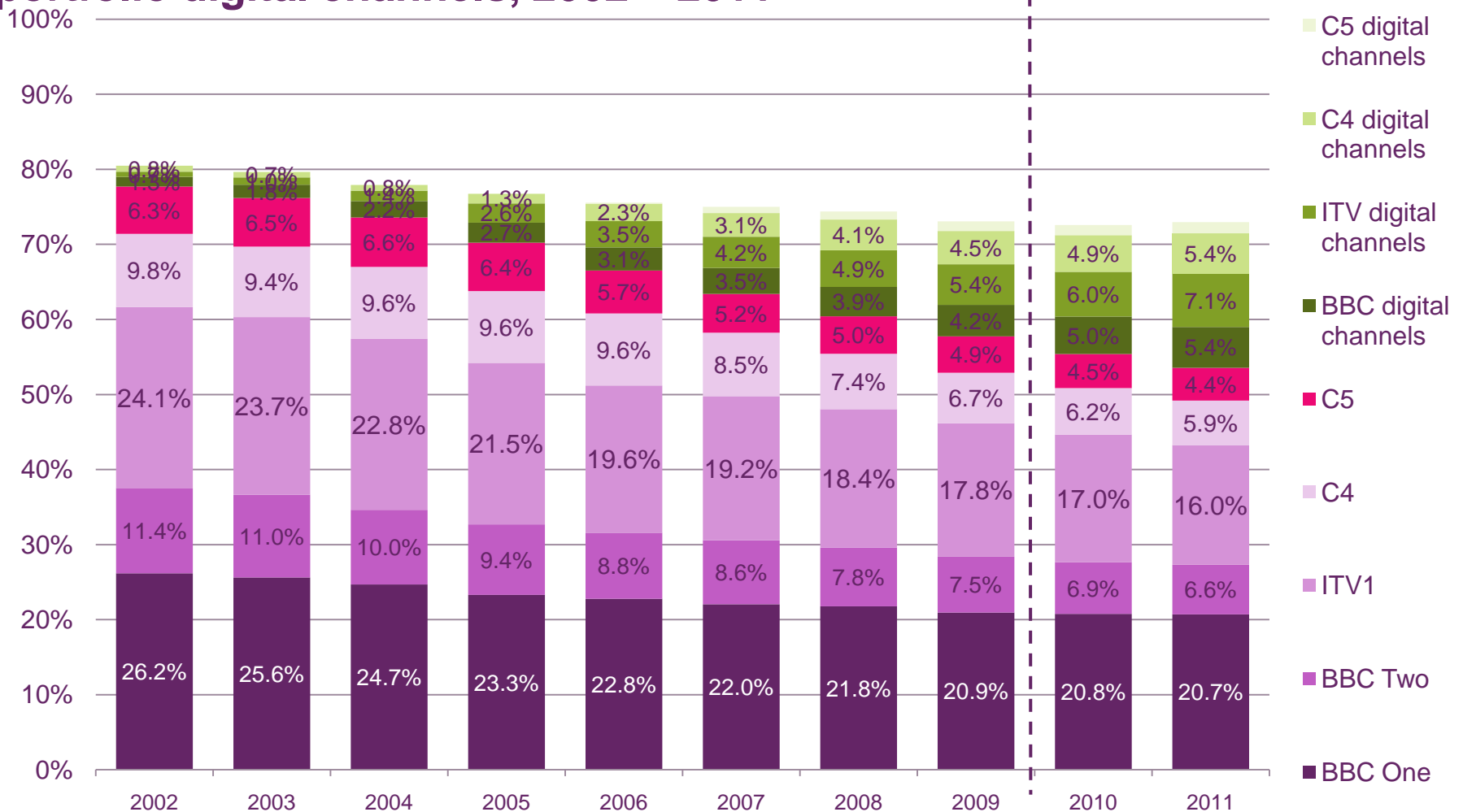
Source: BARB. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

-Cab/Sat only refers to all homes with digital cable and/or digital satellite but no Freeview

-C4 2006-09 data includes S4C; from 2010 it is excluded as S4C became a separate channel following DSO in Wales.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Fig 12a: Channel shares for the PSB channels and their portfolio digital channels, 2002 – 2011

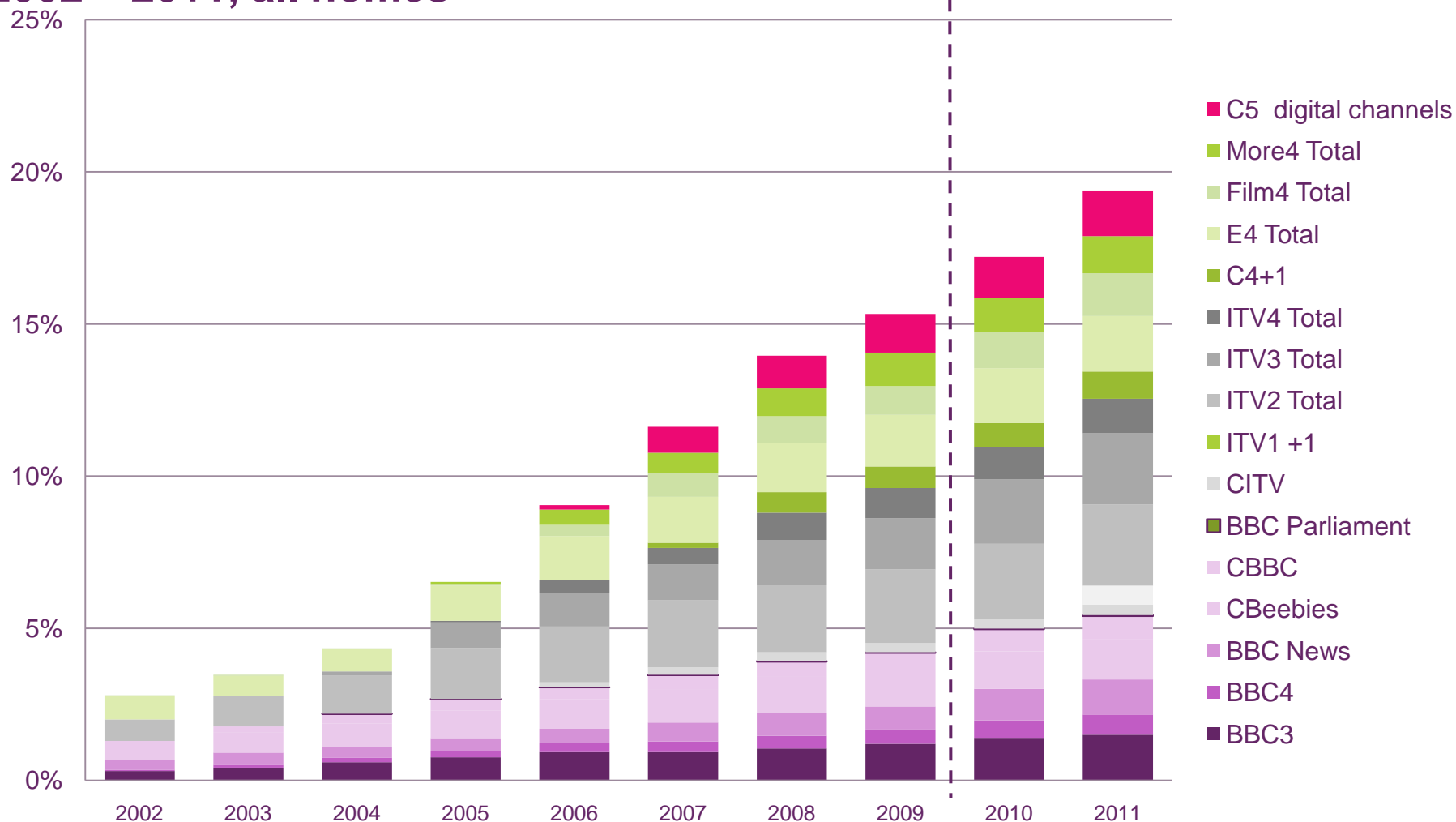


Source: BARB, All Individuals, Network.

* C4 data 2006-09 includes S4C; from 2010 it is excluded as S4C became a separate channel following DSO in Wales. S4C 2011 share = 0.1%

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).

Fig 12b Channel share for individual PSB digital channels 2002 – 2011, all homes



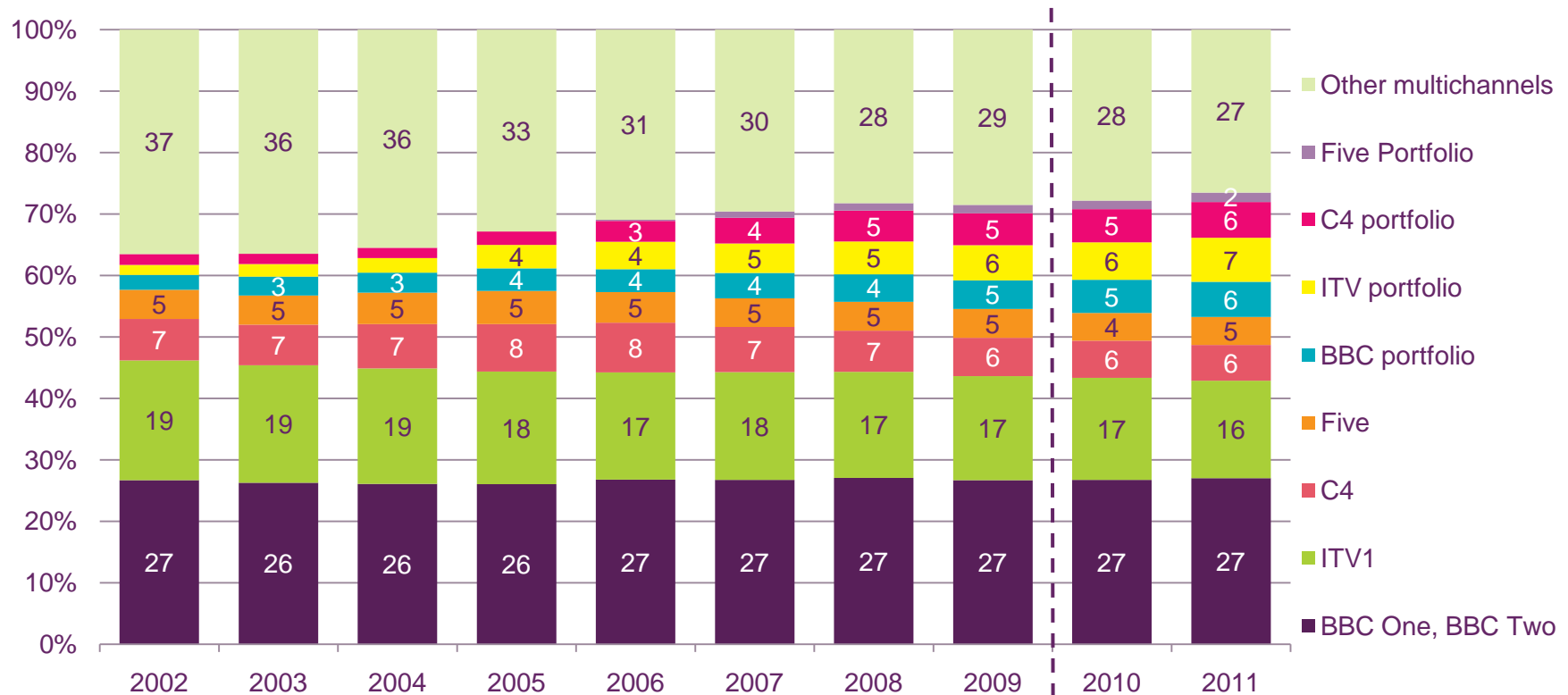
Source: BARB, All Individuals, Network.

-* C4 data 2006-09 includes S4C; from 2010 it is excluded as S4C became a separate channel following DSO in Wales. S4C 2011 share = 0.1%

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).



Fig 12c Shares in multichannel homes, 2002-2011



Source: BARB, All individuals in multichannel homes. Note: New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

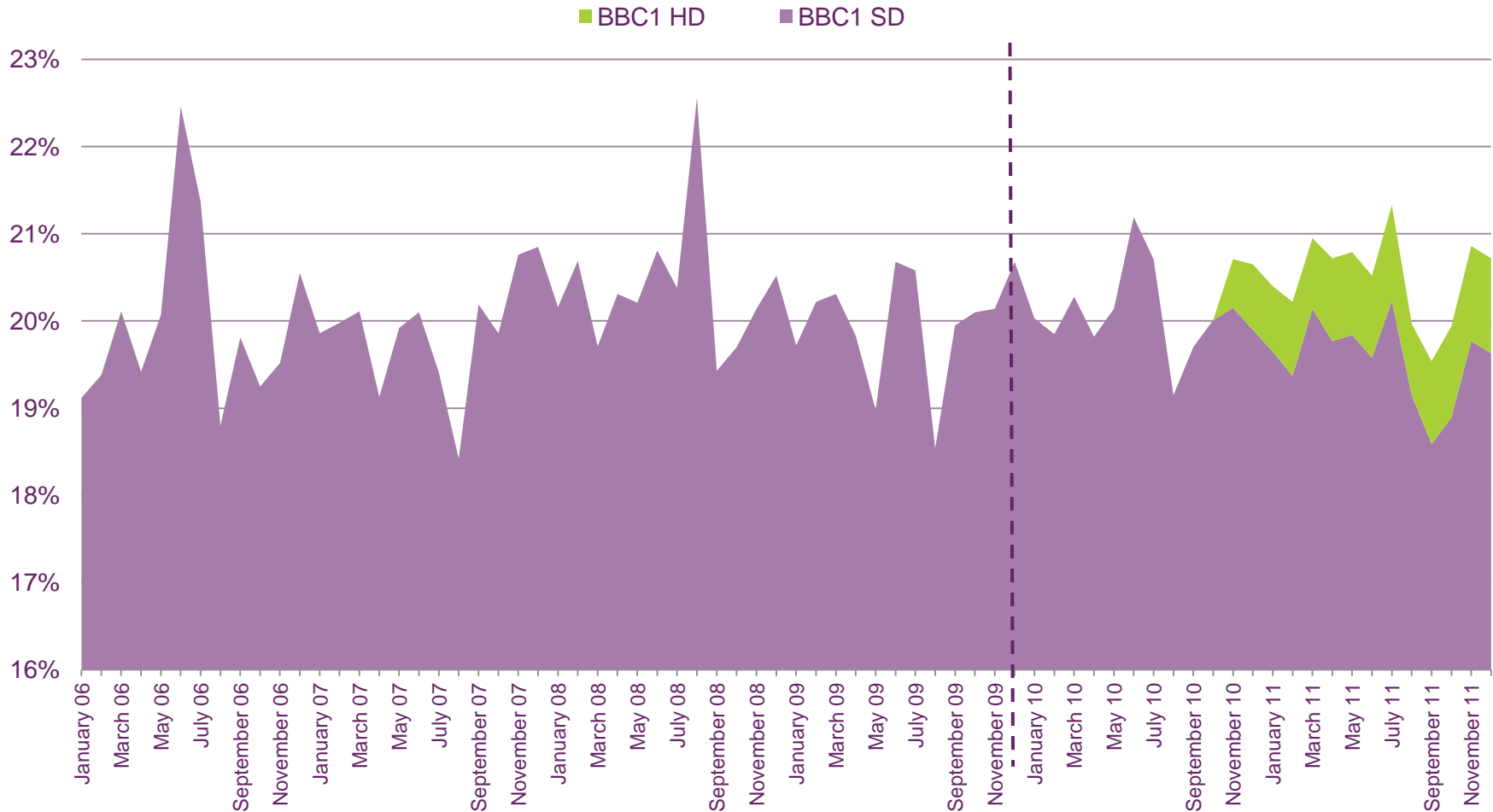
-The actual number of channels that make up the PSB portfolios has increased over the years, and the proportion of people with multichannel television has also grown substantially year on year.

- Main PSB channels include HD components. Their timeshifted channels are included within their portfolio group shares.

-C4 2006-09 data includes S4C; from 2010 onwards it is excluded as S4C became a separate channel following DSO in Wales



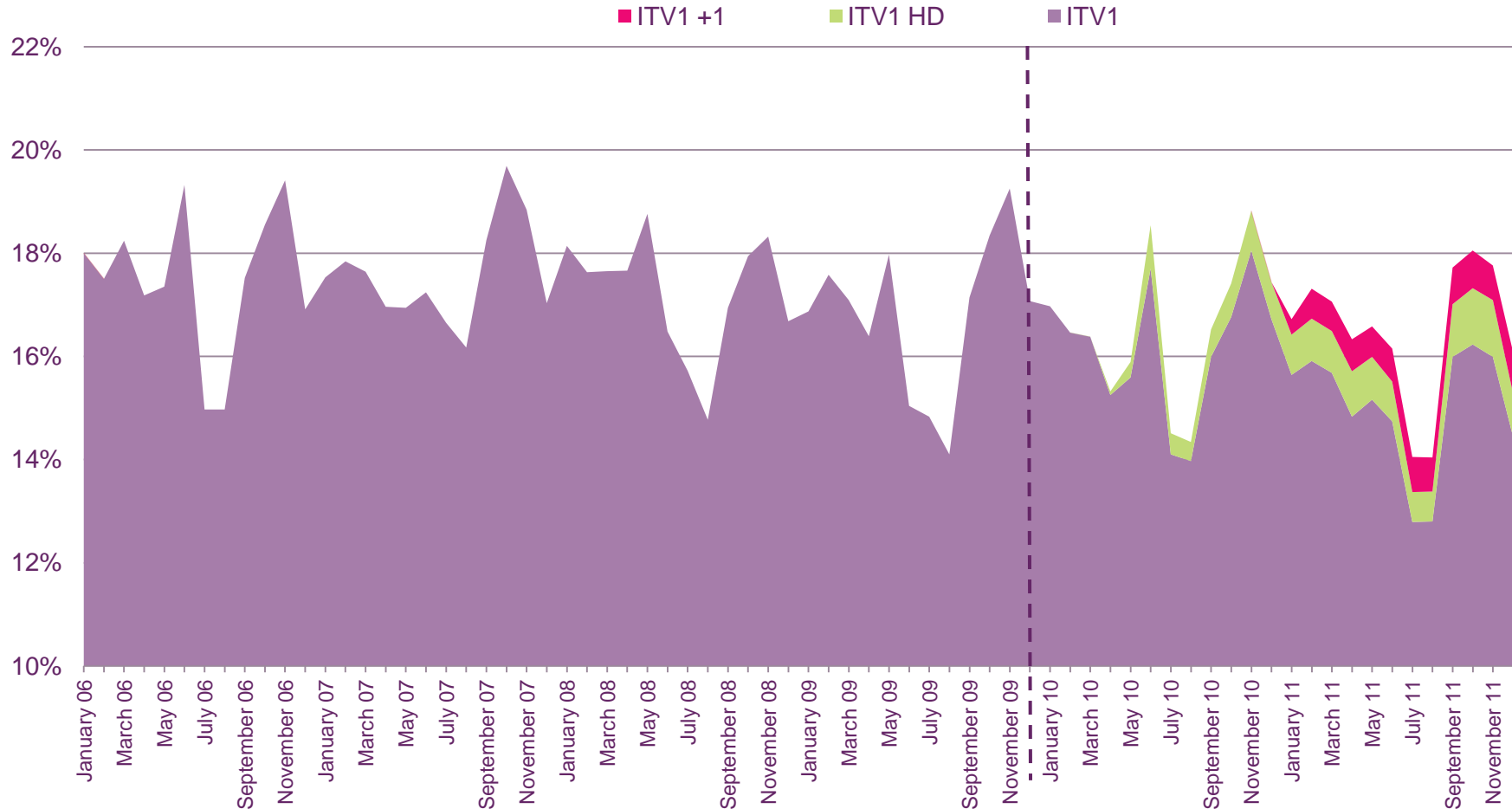
Fig 13 Channel share: BBC One variants, 2006-2011



Source: BARB. 2006-2009: All individuals, Multichannel universe/ 2010+: All individuals in multichannel homes, Network universe.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).



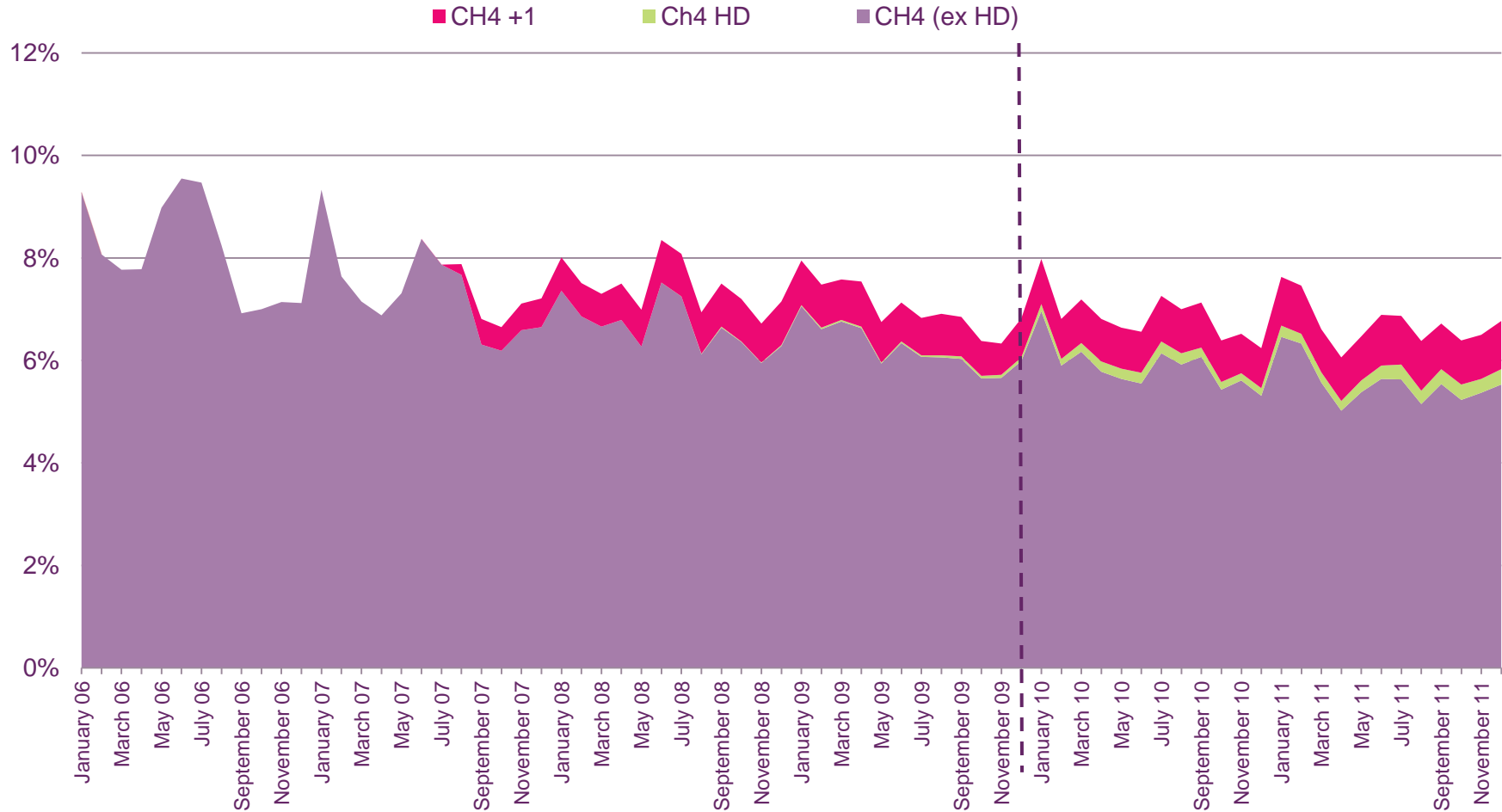
Fig 14 Channel share: ITV1 variants, 2006-2011



Source: BARB. 2006-2009:All individuals, Multichannel universe/ 2010+:All individuals in multichannel homes, Network universe.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).



Fig 15 Channel share: Channel 4 variants, 2006-2011



Source: BARB. 2006-2009: All individuals, Multichannel universe/ 2010+: All individuals in multichannel homes, Network universe.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

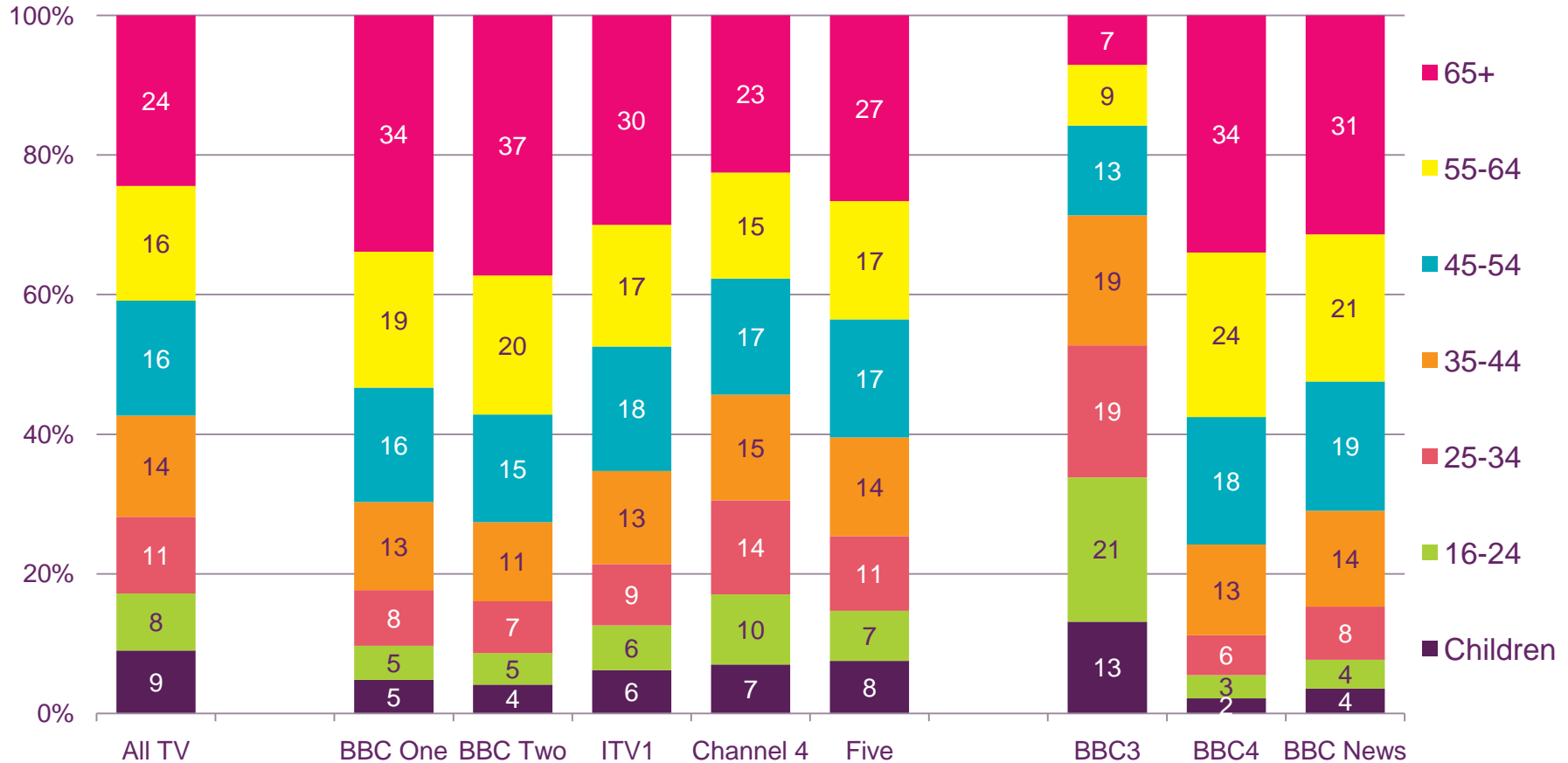


Summary: Audience profiles

- With the exception of Channel 4, all of the main PSB channels attracted an older viewer base than that for Total TV in 2011. Viewers aged 55 or over represented over 40% of audiences to BBC One, BBC Two, ITV1 and Five. BBC One and BBC Two, along with BBC Four and BBC News, had the oldest viewing profiles, with those aged 55 or over representing at least 50% of their respective audiences. (See Figure 16).
- Channel 4 attracted a younger audience base compared with the other main PSB channels – although its profile was fairly similar to that of the Total TV audience. BBC3 attracted the youngest audiences with 16-44s representing 58% of its audience. (See Figure 16).
- Across Total TV, 58% of viewing was represented by viewers in the C2DE socio-economic group in 2011. Across the main five PSB channels, the majority of viewing (50% or more) was represented by C2DE viewers –although BBC One and BBC Two attracted a greater proportion of ABC1 viewers (47% and 48% respectively) than the Total TV audience (42%). ITV1 and Five’s viewing profiles had a more marked skew towards C2DE viewers (62% and 64% respectively). (See Figure 17).
- BBC Four attracted the greatest proportion of ABC1 viewers across the PSB channels, representing 54% of its audience in 2011, compared with 42% of the Total TV audience. (See Figure 17).
- When combined, audiences to the main five PSB channels have an older profile than the Total TV audience. However the BBC and Commercial portfolio channel groups attracted considerably younger audiences . The socio-economic profile of the main five PSB channels combined and the BBC portfolio channels combined was similar to that of the Total TV audience – the commercial PSB portfolio channels attracted a greater proportion of C2DE viewers. (See Figures 18 & 19).

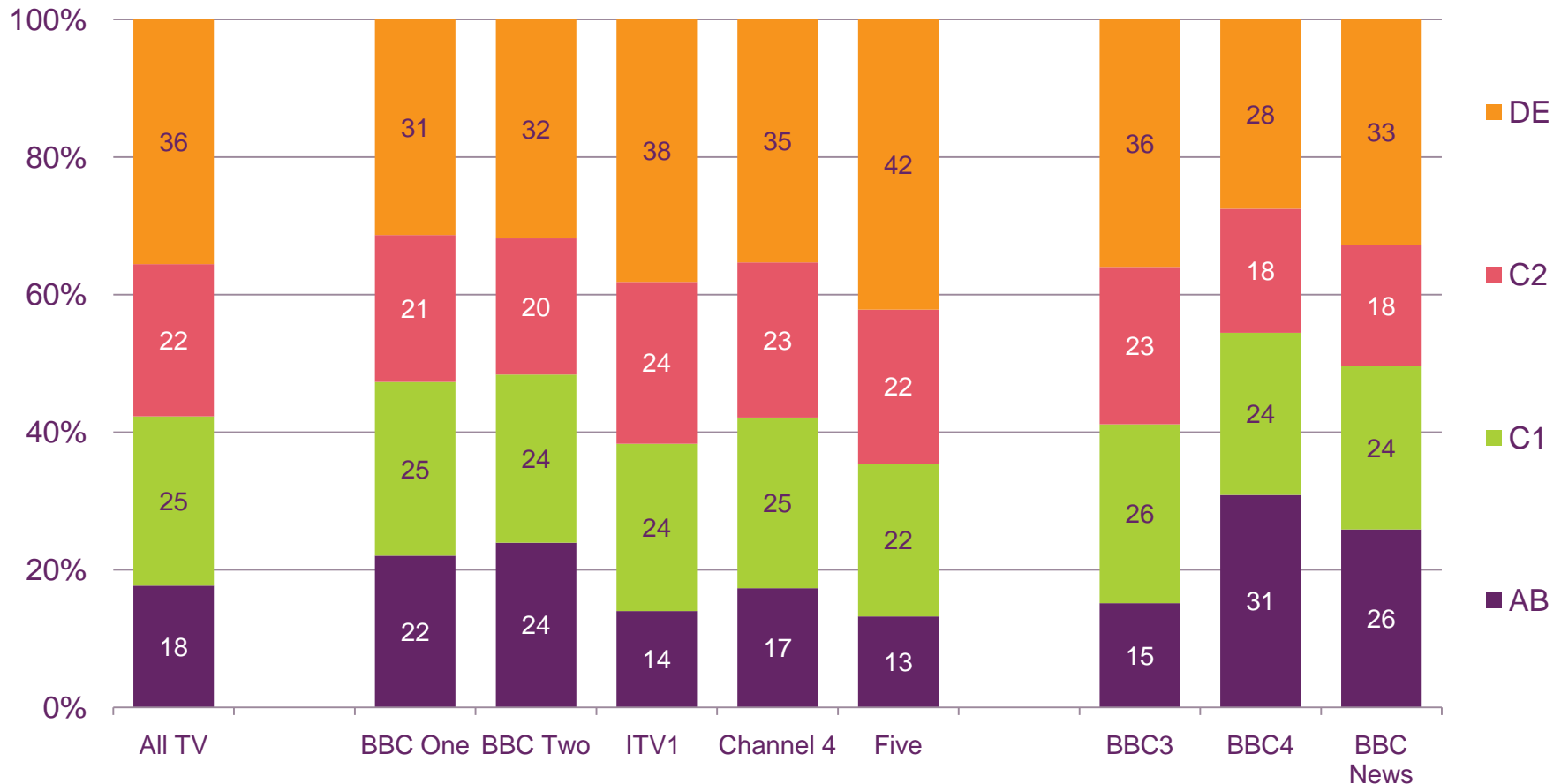
-Due to low audience figures, profiles for BBC HD and BBC Parliament are not spilt out in this year’s report.

Fig 16 Age profile of channel viewers, 2011



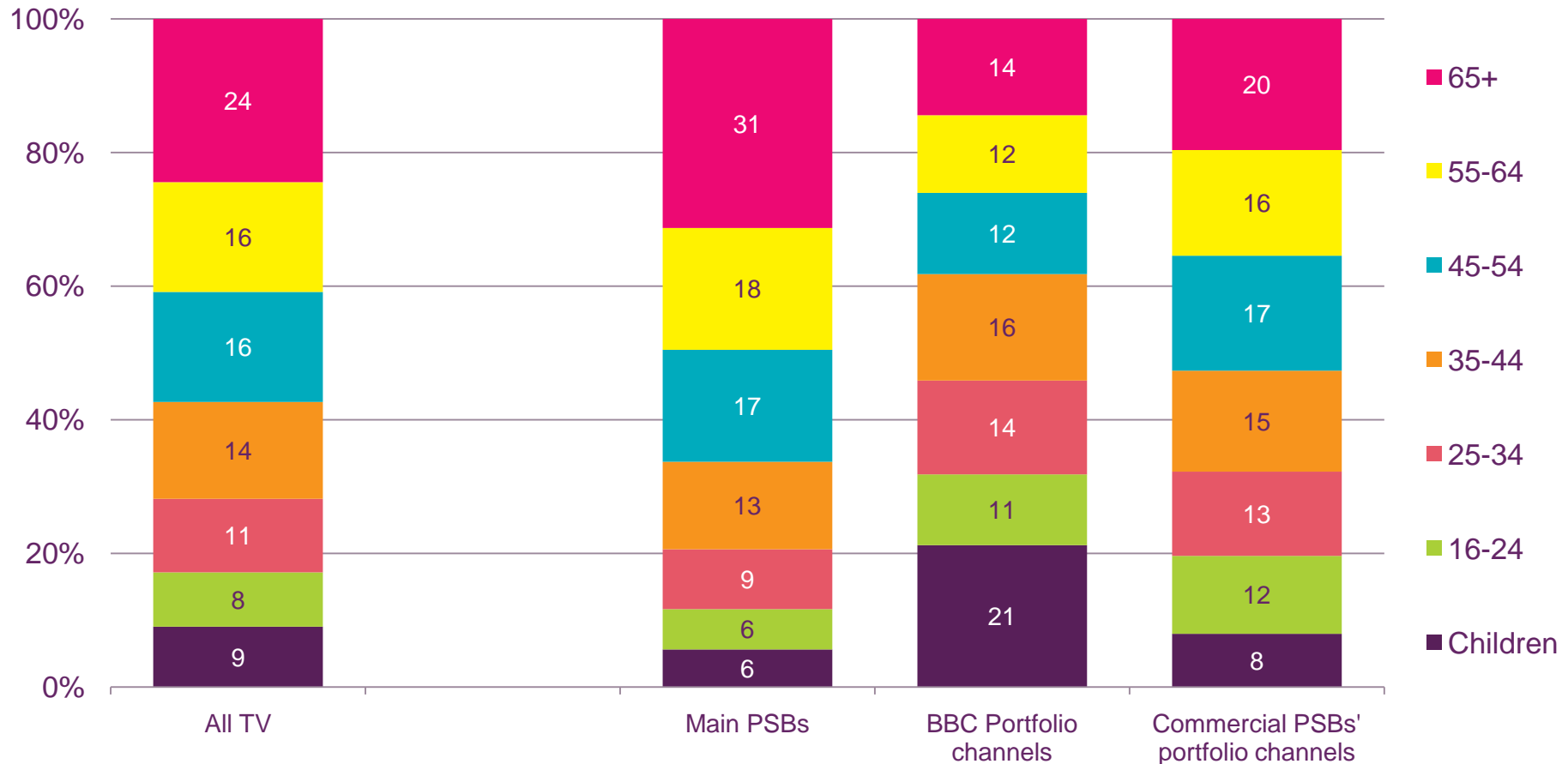
Source: BARB, All Individuals, Network. Profile data calculated on a base of All Individuals.
 -Due to low audience figures profiles have not been included for BBC HD and BBC Parliament.

Fig 17 Socio-economic profile of channel viewers, 2011



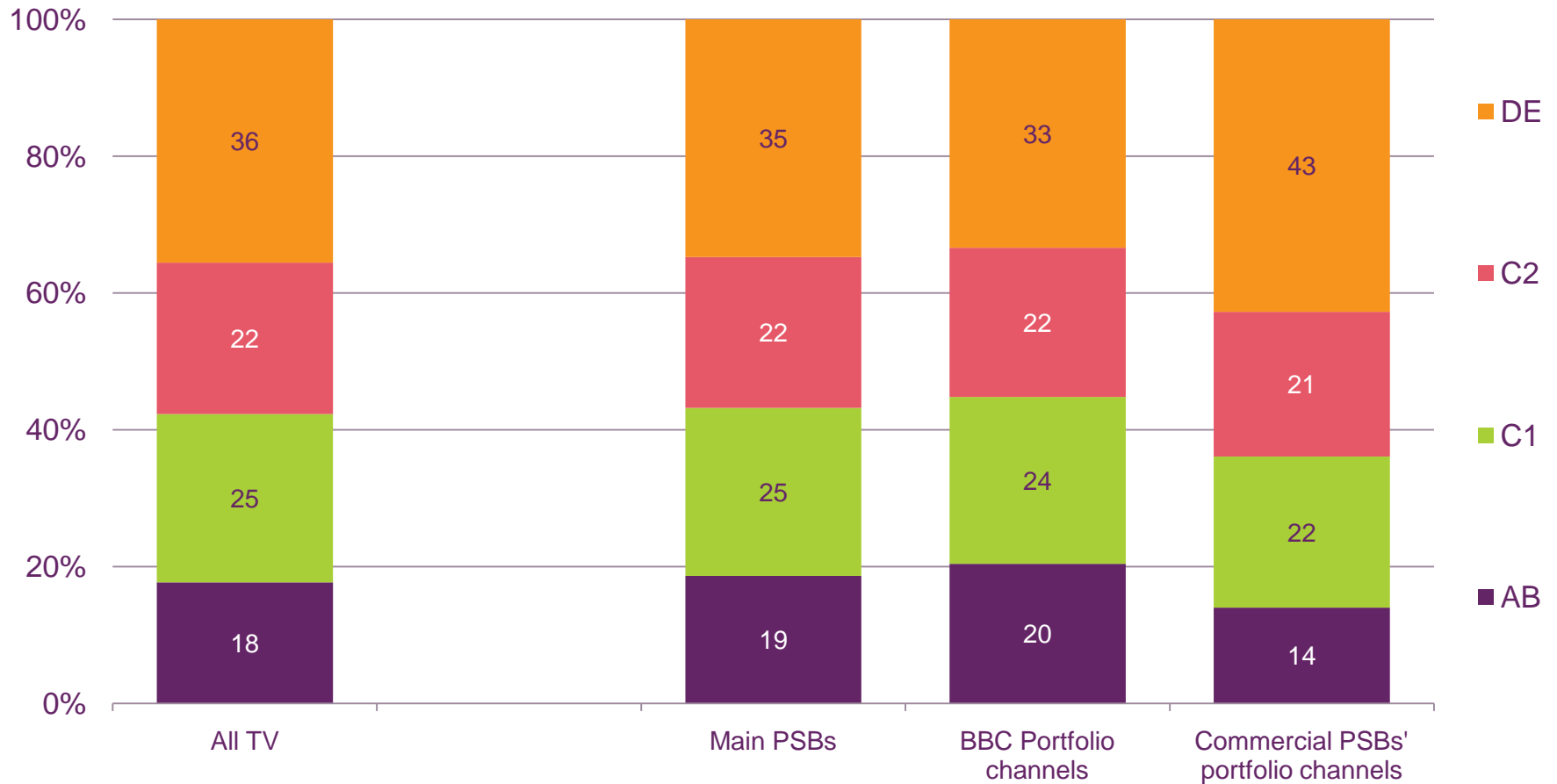
Source: BARB, All Individuals, Network. Profile data calculated on a base of All Individuals.
 -Due to low audience figures profiles have not been included for BBC HD and BBC Parliament.

Fig 18 Age profile of viewers by channel group, 2011



Source: BARB, All Individuals, Network. Profile data calculated on a base of All Individuals.

Fig 19 Socio-economic profile by channel group, 2011



Source: BARB, All Individuals, Network. Profile data calculated on a base of All Individuals.

Summary: Non-linear viewing via time-shifting



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

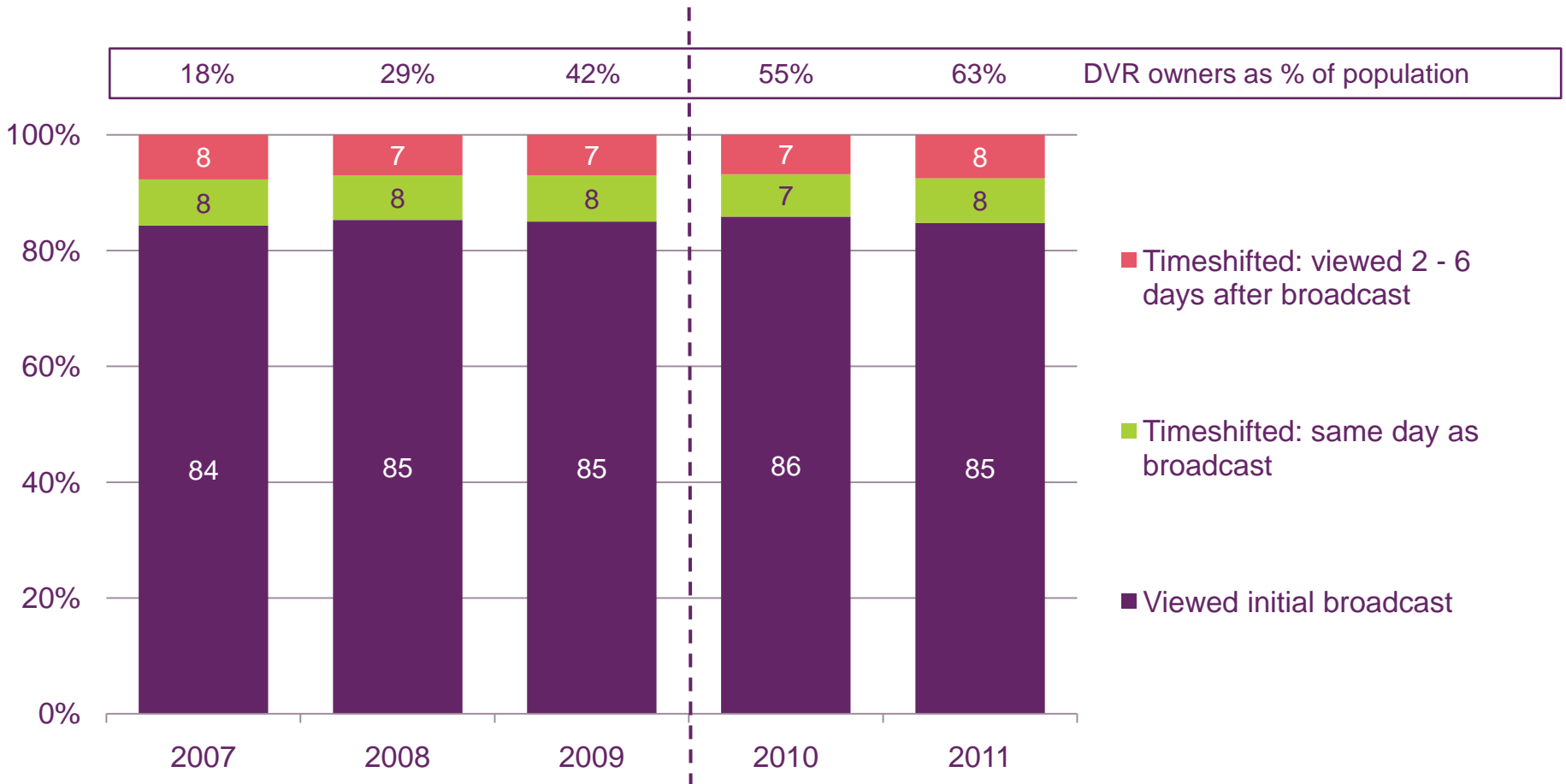
- This section looks at the proportion of viewing that was time-shifted in 2011 among all individuals with Digital Video Recorders (DVRs). Time-shifted viewing is defined in BARB analysis as viewing of programmes recorded and subsequently played back within seven days, as well as viewing after pausing or rewinding live TV. Viewing outside the seven day window is not measured, so it is likely reported time-shifted viewing is lower than in reality.
- 15% of all viewing to the main five PSB channels amongst all individuals with DVRs (63% of the population) was time-shifted in 2011 - this has remained stable since 2007. In 2011, half of measured time-shifted viewing to the main PSB channels was played back the same day as recorded (note: this figure includes viewing to programmes viewed after pausing or rewinding live television). (See Figure 20).
- Among individuals with DVRs the proportion of total time-shifted viewing varies by channel. One-fifth of all viewing to Channel 4 and Five in 2011 was time-shifted compared with between 14-15% of viewing on each of BBC One, BBC Two and ITV1. (See Figure 21).
- The use of DVRs to time-shift viewing also varies across age group. Time-shifted viewing represented 23% of viewing among 16-24 year old DVR owners, compared with 9% of viewing among those DVR owners aged 65 or over. (See Figure 22).
- Further analysis illustrates the differences in time-shifted viewing by programme genre. Possibly due to the nature and immediacy of programming, news, current affairs and sports programmes are less likely to be time-shifted, while drama programmes (32% of viewing) and soaps (27% of viewing time) are most likely to be time-shifted. (See Figure 23).

- 2007 was the first full year DVR use across all platforms was recorded, therefore data pre-2007 is not reported.

Non-linear viewing via time-shifting



Fig 20 Proportion of live vs. time-shifted viewing - Main five PSB channels, 2007-2011



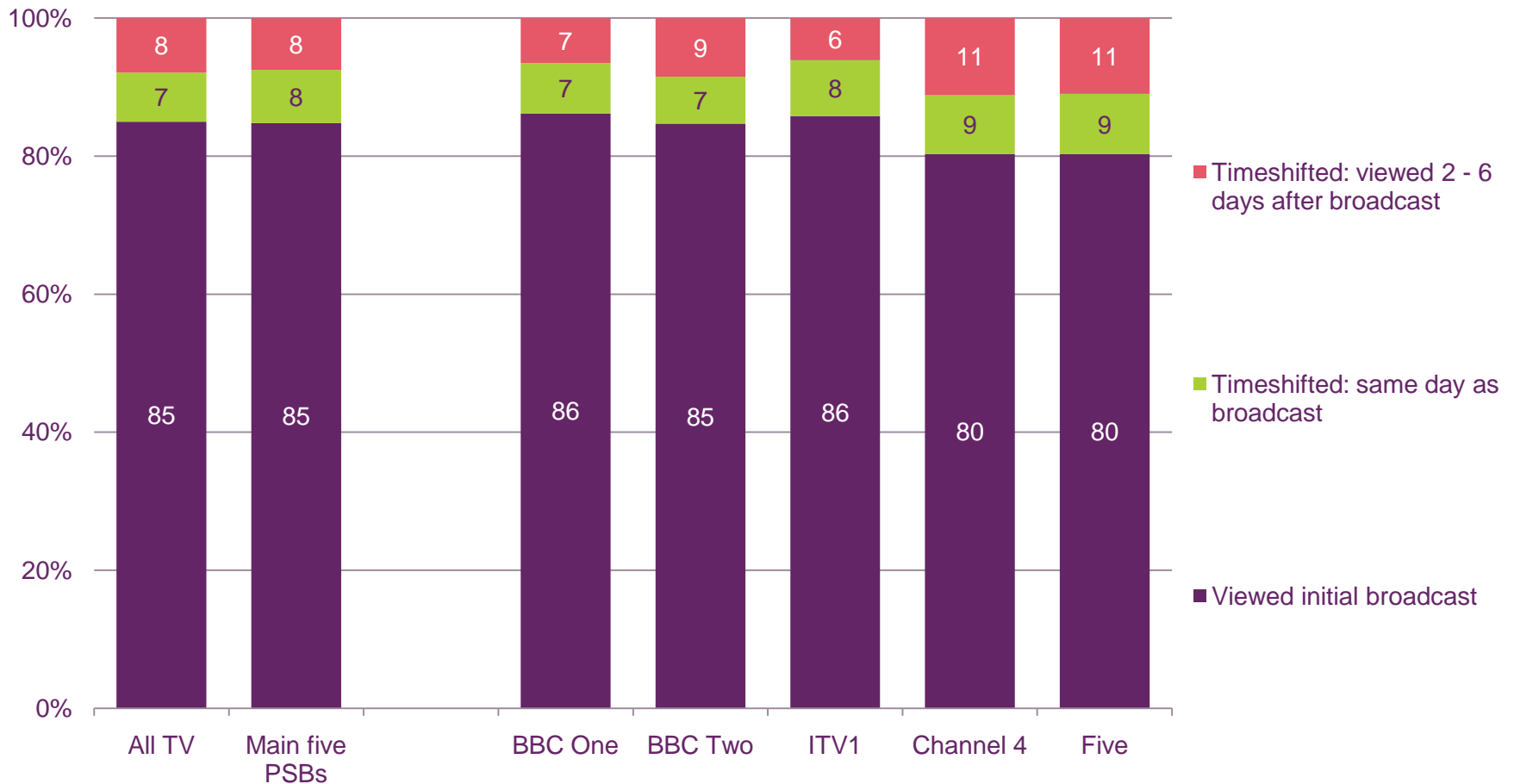
Source: BARB, All DVR owners. 2007-2009: Multichannel homes/ 2010+: Network.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Non-linear viewing via time-shifting



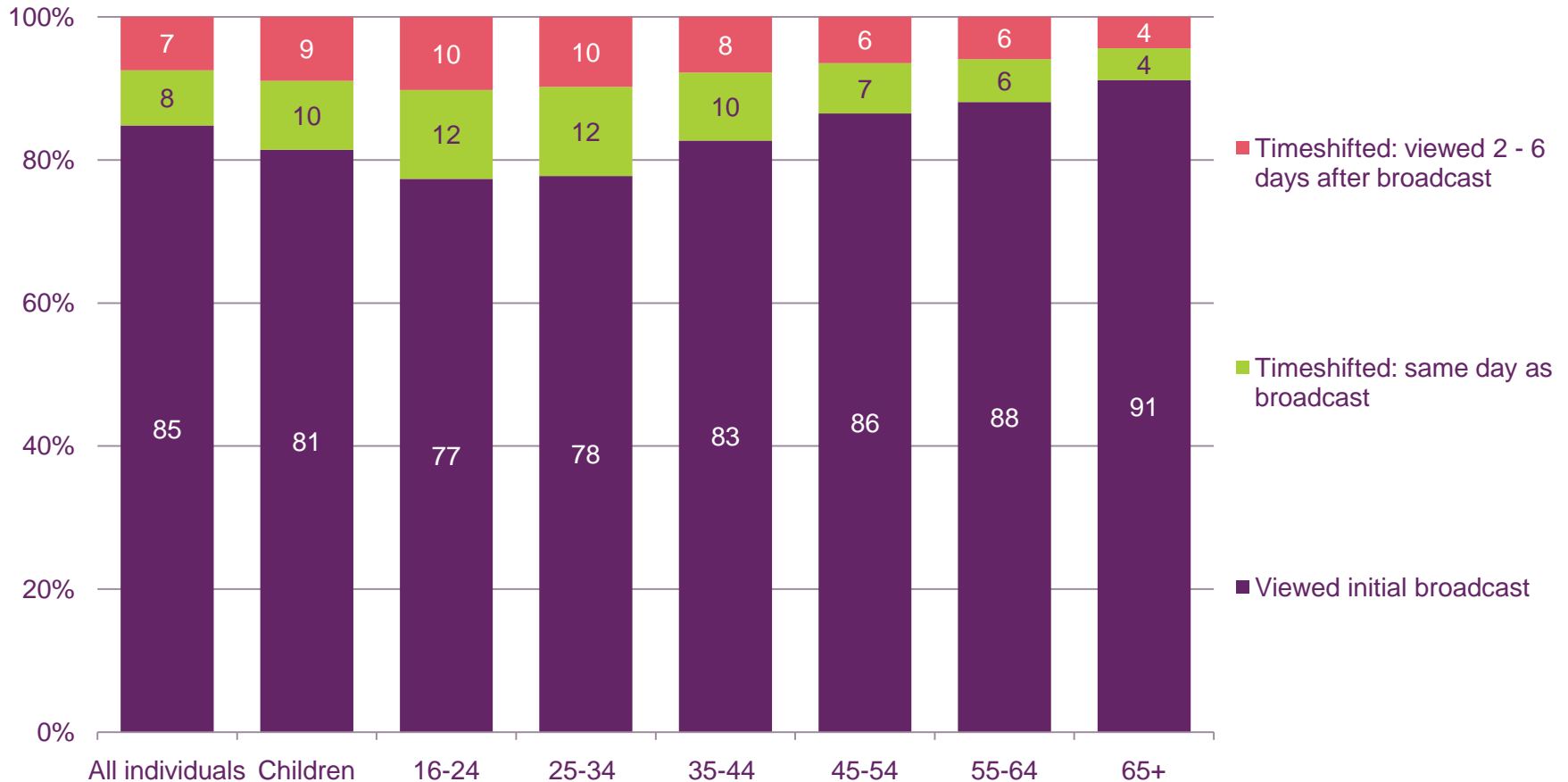
Fig 21 Proportion of live vs. time-shifted viewing by channel - Main five PSB channels, 2011



Source: BARB, All DVR owners, Network.

-In 2011, 'DVR owners' represented 63% of the population

Fig 22 Proportion of live vs. time-shifted viewing across the main five PSB channels by age group, 2011



Source: BARB, All DVR owners by age group, Network.

Non-linear viewing via time-shifting



Fig 23 Proportion of live vs. time-shifted viewing across the main five PSB channels by genre, 2011



Source: BARB, All DVR owners, Network.
 -See Definitions: All genres analysis.

Summary: Viewing of range of programmes



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- On the main five PSB channels, the proportion of viewing to different programme genres remained fairly similar in 2011 compared to 2006. The key changes were an increase in viewing to Other Factual programming, from 15% in 2006 to 19% in 2011 and an increase in viewing to the Entertainment genre from 17% to 19% over the same period, making these the two most watched genres. The proportion of viewing to the main five PSB channels represented by Current Affairs programming also increased from 4% to 7% in 2011. (See Figure 24).
- The most notable decreases in viewing were across Drama (down from 14% of viewing to 11%), Sport (from 10% to 8%) and Films (from 10% to 8%). (See Figure 24).
- In terms of peak time (18:00-22:30) viewing to the main five PSB channels, the genre profile between 2006 and 2011 changed most notably across the Entertainment, Drama and Soaps genres. While the proportion of peak time viewing represented by Soaps and Drama fell from 17% to 15% and from 21% to 16% respectively, viewing to the Entertainment genre increased (from 14% to 20% in 2011). Entertainment programming represented the largest share of viewing in 2011, followed by Other Factual programming. (See Figure 25).
- Smaller changes were seen across Sport (down from 6% to 4% in 2011) and Current Affairs (up from 3% to 5% in 2011). (See Figure 25).

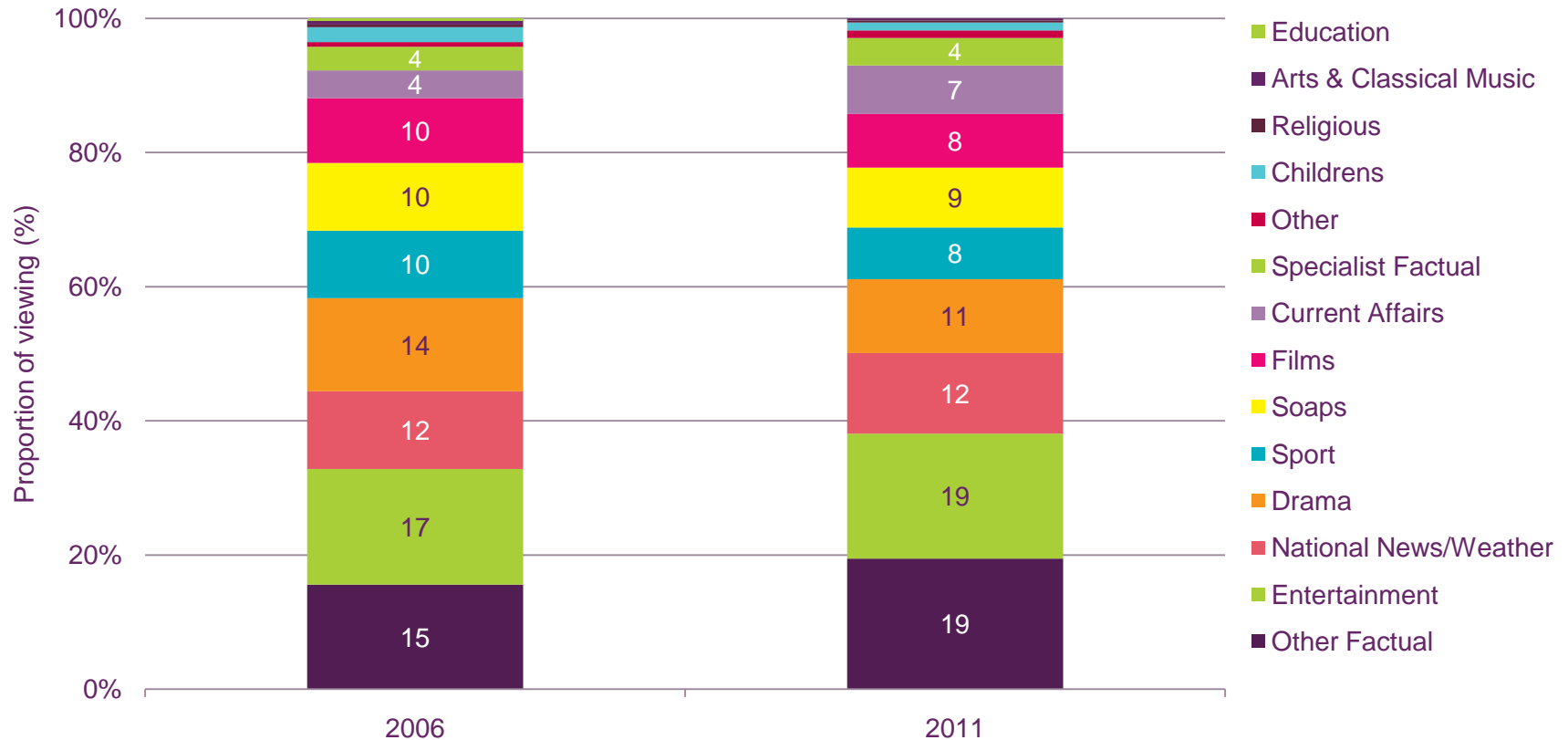
-Changes to the BARB reporting system in 2010 now allow broadcasters to retrospectively amend the genre labelling of broadcasts they have aired. These changes will apply to all historic data for respective programmes/films. The effect of this is analysis within this report is based on a snapshot of data at a given point in time (i.e. when analysis was conducted). All analysis is based as of March/April 2012.

-See *Definitions: All genres analysis*.

Viewing of range of programmes: over time



Fig 24 Proportion of viewing by genres on the main five PSB channels - All homes, 2006 vs. 2011



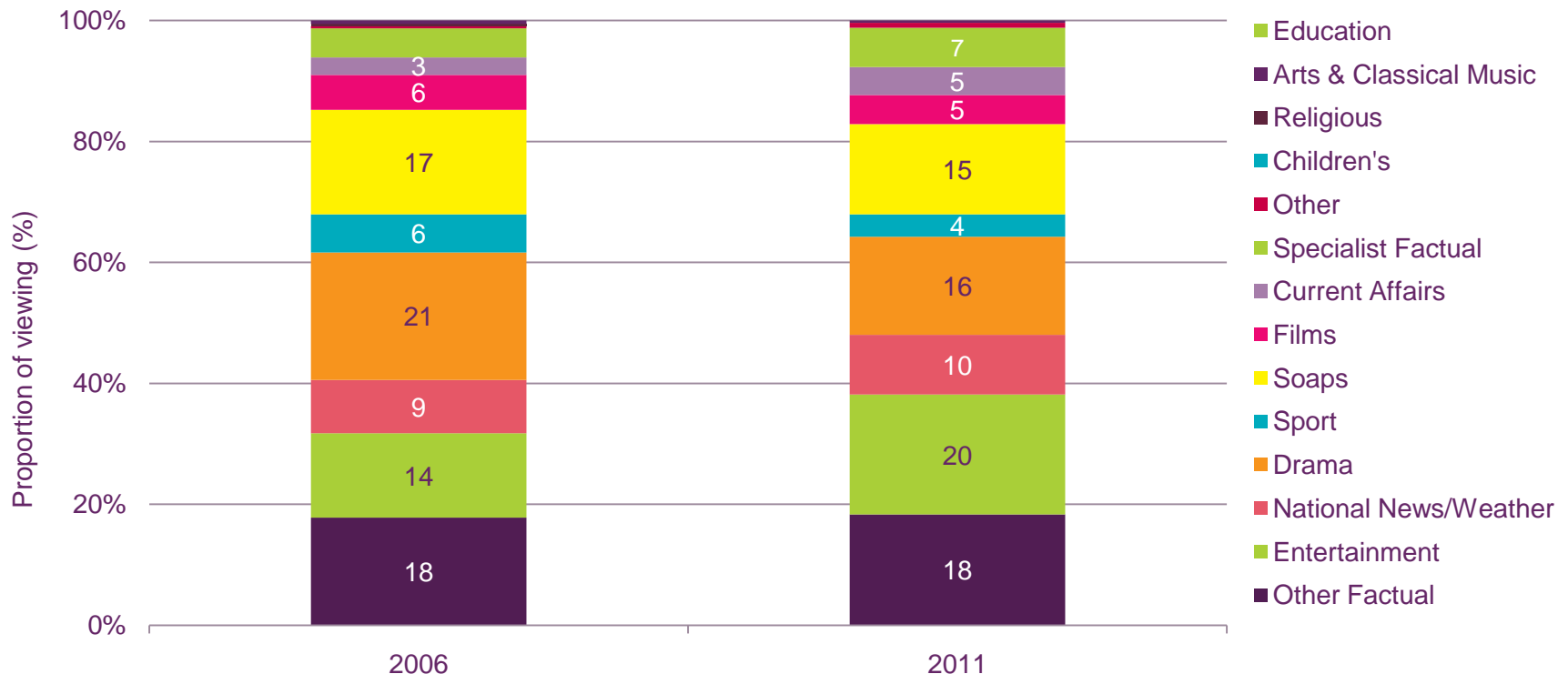
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

-Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Viewing of range of programmes: over time

Fig 25 Proportion of viewing by genre on the main five PSB channels - All homes, 2006 vs. 2011, Peak time (1800-2230)



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

-Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Summary: Viewing of range of programmes, by channel (1)

- The programme genre profile for each of the main five PSB channels across the whole day differs greatly (See Figure 26):
 - **BBC One:** National News/Weather accounted for the greatest proportion of viewing on the channel (23%) – well above the 12% average accounted for by this genre across the main five PSB channels. Drama (12%), Sports (9%) and Current Affairs (10%) also represented above-average shares of viewing on BBC One compared with the average across the five main PSB channels.
 - **BBC Two:** The most popular genre on the channel in 2011 was Other Factual, representing 35% of viewing. Sports (14%) and Specialist Factual (11%) programming represented above-average viewing profiles on BBC Two when compared with the five main PSB channels combined.
 - **ITV1:** Entertainment accounted for 26% of viewing on ITV1, making it the most watched genre on the channel. This was followed by Soaps (18%) and Drama (13%) – with all three genres accounting for greater proportions of viewing on ITV1 compared with the average across the main five PSB channels.
 - **Channel 4:** Other Factual (34%), Entertainment (28%) and Films (15%) accounted for the majority of viewing on Channel 4 in 2011.
 - **Five:** Films (29%) and Drama (19%) combined represented almost half of all viewing on Five – with both genres representing above-average shares when compared with the main five PSB channels. Other Factual programming represented a further 20% of viewing in 2011.

Summary: Viewing of range of programmes, by channel (2)



- Figure 27 shows the proportion of viewing represented by different genres on each of the main five PSB channels in 2011 during peak time (18:00-22:30):
 - **BBC One:** Drama dominated peak time viewing on BBC One, accounting for 22% of viewing compared with 12% across the whole day. National News (16%) and Current Affairs programming (11%) represented higher shares of viewing than any of the other main five PSB channels.
 - **BBC Two:** As with trends seen across the whole day, Other Factual programming represented over a third of BBC Two's viewing (37%), this was followed by Entertainment (23%). Specialist Factual programming accounted for 18% of peak time viewing on the channel – higher than the other five main PSB channels.
 - **ITV1:** Soaps (29%) and Entertainment (27%) represented the majority of viewing on ITV1 during peak time, with shares well above the average for the main five PSB channels combined.
 - **Channel 4:** As noted with trends across the whole day, Other Factual (36%), Entertainment (20%) and Films (15%) accounted for the majority of peak time viewing on Channel 4 in 2011.
 - **Five:** While Films (29%) represented the largest proportion of viewing on Five across the entire day, Drama (29%) and Other Factual (29%) both dominated during peak time in 2011.

Summary: Viewing of range of programmes, by channel (3)



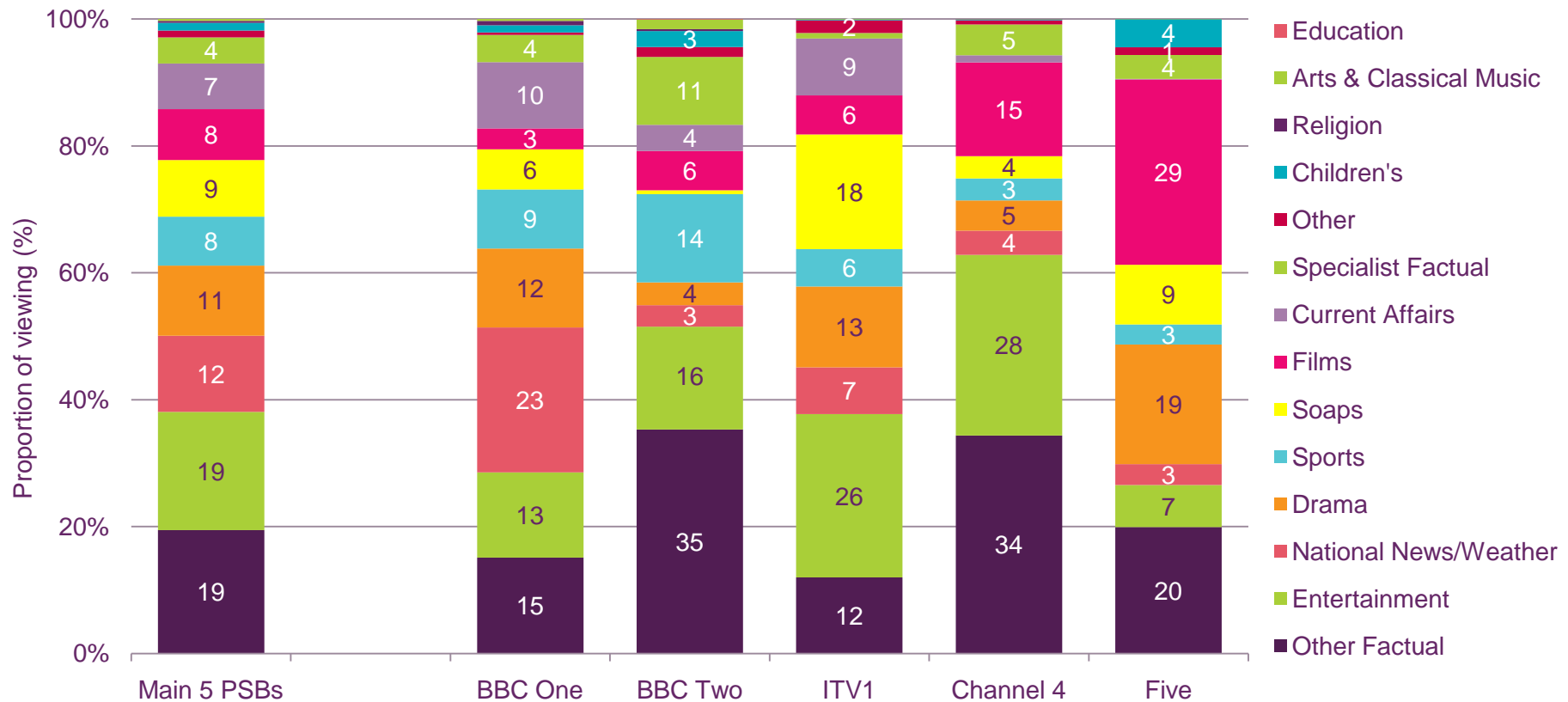
- It is useful to consider trends in viewing across the main five PSB channels in the context of the range of programming shown. (See Figures 28 & 29).
 - **BBC One:** Across the whole day, Other Factual, National News, Films, Specialist Factual and Children's programming all accounted for lower shares of viewing than output. Entertainment, Drama, Sports and Soaps were all relatively more popular on the channel, accounting for greater shares of viewing than output.
 - **BBC Two:** The most viewed genres across the entire day on BBC Two; Other Factual, Entertainment, Sports and Specialist Factual, all performed well, representing a greater proportion of viewing compared with output.
 - **ITV1:** The strongest performing genres on ITV1 when comparing output with viewing shares were Entertainment, Drama and Soaps. Across the whole day, National News represented 17% of output compared with 7% of viewing – similarly Current Affairs accounted for 16% of output in 2011 compared with 9% of viewing.
 - **Channel 4:** The Other Factual and Entertainment genres both performed well in terms of viewing shares versus output shares. However, while National News represented 17% of peak time output, the genre represented 7% of viewing.
 - **Five:** Across the entire day, Other Factual represented a fifth of viewing compared with a third of output. Similarly, while the Children's genre accounted for 17% of output in 2011, the genre represented 4% of viewing on the channel.

-Output analysis shown here is based on BARB genre classification in order to make the analysis between output and viewing comparable. The BARB output data is different to the output figures in information pack C which are based on different programme classifications.

Viewing of range of programmes: by channel



Fig 26 Proportion of viewing by genre by channel – Main five PSB channels, 2011

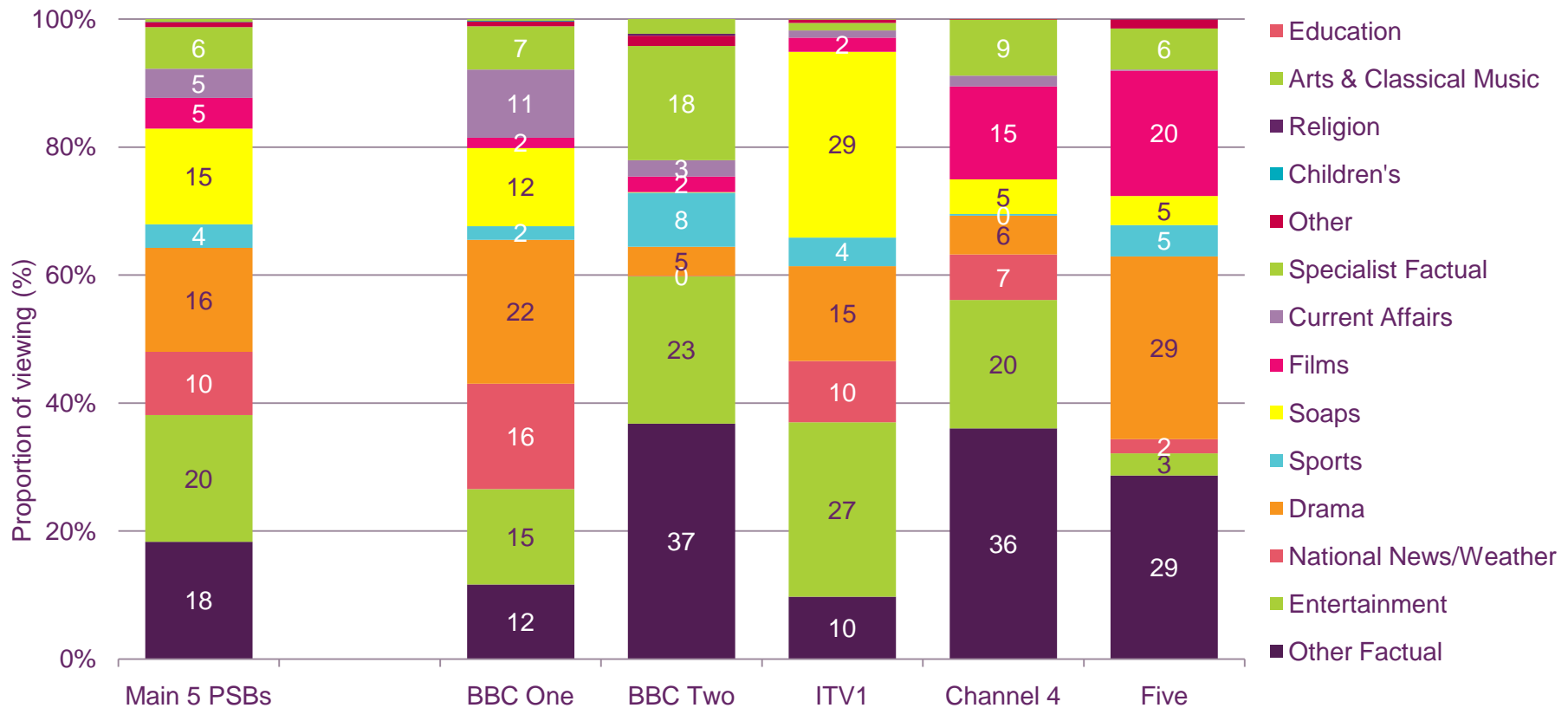


Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.

Viewing of range of programmes: by channel



Fig 27 Proportion of viewing by genre by channel - Main five PSB channels, Peak time (1800-2230), 2011



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.

Viewing of range of programmes: by channel



Fig 28 Proportion of viewing by genre versus output* range – Main five PSB channels, 2011

Note: Output is defined in this chart pack based on BARB genre definitions.



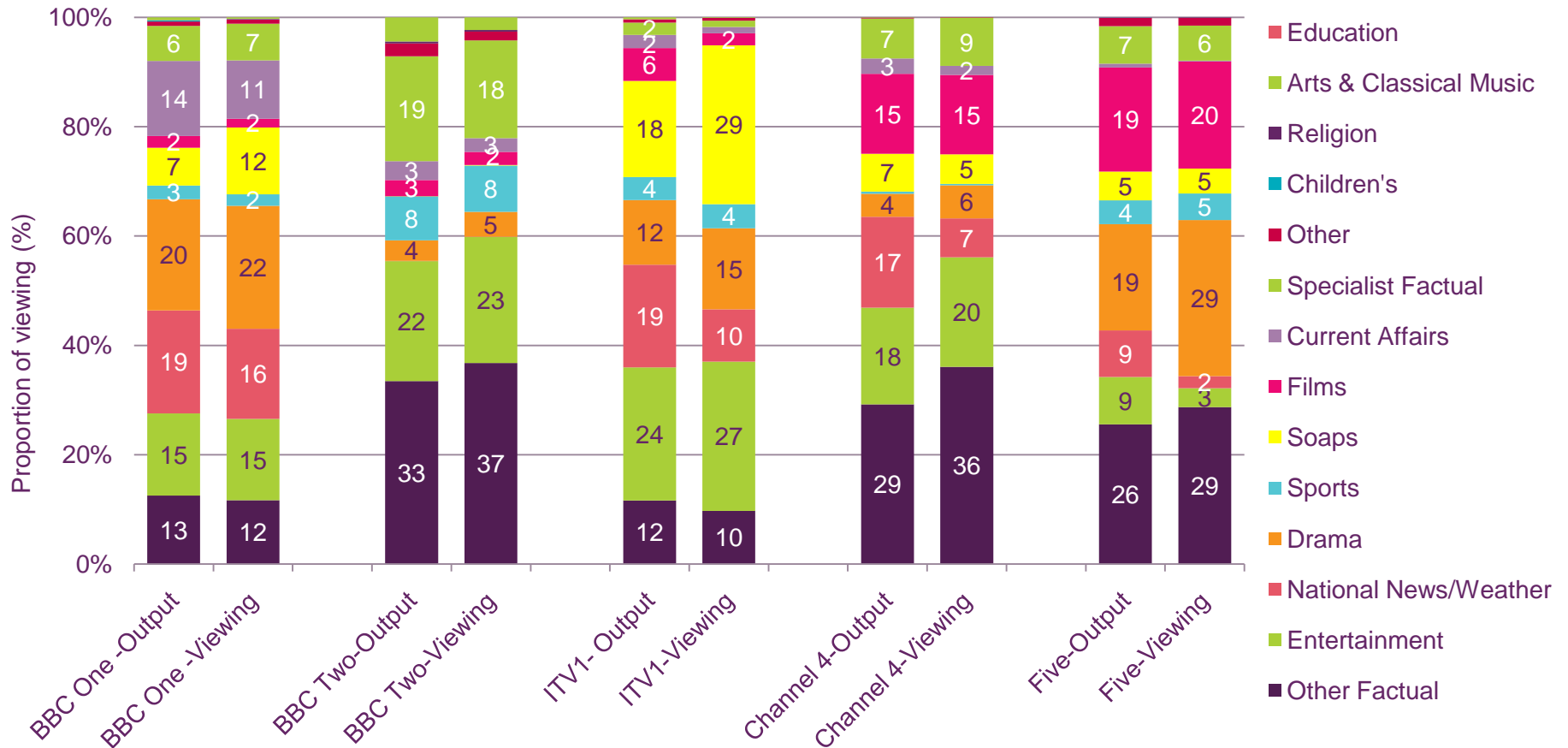
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.

Viewing of range of programmes: by channel

Fig 29 Proportion of viewing by genre versus output range – Main five PSB channels, Peak time (1800-2230), 2011



Note: Output is defined in this chart pack based on BARB genre definitions.



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.

Summary of viewing to the main five PSB channels by genre, 2006 vs. 2011

| <u>Genre</u> | Total hours (rounded) viewed per year per individual (4+) to the main five PSB channels | |
|------------------------|---|-------------|
| | <u>2006</u> | <u>2011</u> |
| Other Factual | 126 | 141 |
| National News | 91 | 86 |
| UK Drama | 80 | 65 |
| UK Soaps | 74 | 59 |
| Sport | 81 | 56 |
| Current Affairs | 33 | 53 |
| Specialist Factual | 29 | 30 |
| Nations/regions news | 28 | 27 |
| UK Sitcom | 10 | 8 |
| Religious | 3 | 2 |
| Arts & Classical Music | 5 | 2 |
| Education | 2 | 0 (0.1) |

Changes to the BARB reporting system in 2010 now allow broadcasters to retrospectively amend the genre labelling of broadcasts they have aired.

These changes will apply to all historic data for respective programmes/films. The effect of this is analysis within this report is based on a snapshot of data at a given point in time.

All analysis is based as of March/April 2012.

Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

See *Definitions: PSB genre analysis*.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Viewing of range of programmes



Top programmes on the main five PSB channels by genre, 2011

| <u>Genre</u> | <u>Programme</u> | <u>Channel</u> | <u>Date of first broadcast (2011)</u> | <u>Average audience (000s)</u> |
|------------------------|-------------------------------------|----------------|---------------------------------------|--------------------------------|
| Other Factual | I'm a Celebrity- Get Me Out of Here | ITV1 | 13 November | 12,474 |
| Specialist Factual | Frozen Planet | BBC One | 2 November | 9,727 |
| Arts & Classical Music | Last Night of the Proms | BBC One | 10 September | 4,455 |
| Education | Battlefront Television | Channel 4 | 18 September | 129 |
| Religious | Songs of Praise | BBC One | 2 October | 3,309 |
| UK Drama | Downton Abbey | ITV1 | 6 November | 12,147 |
| UK Soaps | Coronation Street | ITV1 | 14 February | 12,559 |
| Sport | UEFA Champions League Live | ITV1 | 28 May | 8,312 |
| UK Sitcom | Absolutely Fabulous | BBC One | 25 December | 9,066 |
| National News | BBC News | BBC One | 29 April | 10,762 |
| Current Affairs | The Royal Wedding | BBC One | 29 April | 13,590 |

Source: BARB, All individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five). Figures for ITV1 include ITV1 HD.
 -Following changes to the BARB reporting system in 2010, programme/genre labelling can be retrospectively changed by broadcasters. Programme data displayed is correct as of March/April 2012.
 -See *Definitions: PSB genre analysis*.

Summary: Factual, Arts & Classical Music, Education and Religion; 2006 vs. 2011



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- Between 2006 and 2011, viewing to **Other Factual** programming on the main five PSB channels increased from 124 hours to 141 hours per year per individual. Viewing increased across each of the five PSB channels with the exception of Channel 4, which saw a decline of 6 hours per year. (See Figure 30).
- **Specialist Factual** viewing remained fairly stable between 2006 and 2011 at 28 hours and 30 hours respectively. The BBC channels account for the majority of viewing to this genre. (See Figure 30).
- Viewing to Arts & Classical Music, Education and Religious programming on the main five PSB channels declined in 2011 compared to 2006 levels (see Figures 31-33):
 - **Arts & Classical Music:** Fell from 4.5 in 2006 to 2.4 hours in 2011, with little or no viewing on the commercial PSB channels.
 - **Education:** Decreased from 2.1 to 0.1 hours in 2011, driven by the decline on both key channels, BBC Two and Channel 4.
 - **Religious:** Fell from 3.2 to 2.3 hours, mainly due to falls across BBC One and Channel 4 viewing.
- Across **all channels**, the proportion of total viewing to Other Factual and Specialist Factual programming represented by the main five PSB channels fell and viewing to the BBC and Commercial PSB portfolio channels increased. In 2006, the main five PSB channels accounted for 82% of all Arts & Classical Music viewing - this fell to 56% in 2011 as viewing to the BBC Portfolio channels rose from 7% to 30% and the Other Multichannels increased from 7% to 13%. (See Figure 34).

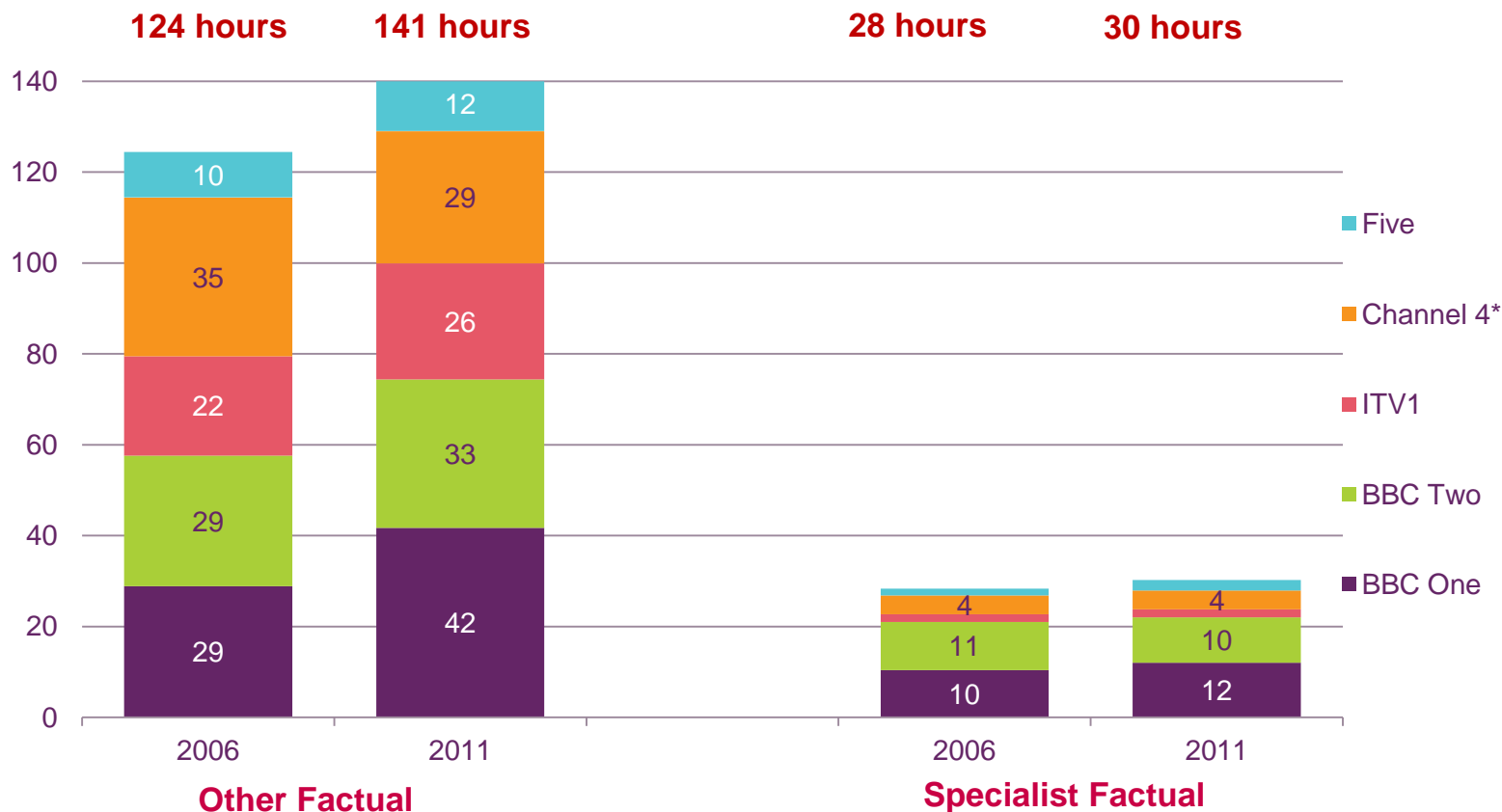
-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of March/April 2012.

Factual, Arts & Classical Music, Education and Religion,



Fig 30 Total viewing of Other and Specialist Factual – Main five PSB channels, 2006 vs. 2011

Total hours per year watched by average individual (4+)



Source: BARB, All Individuals., Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

-Other Factual = Hobbies & Leisure category, Documentaries – Human Interest; Factual Entertainment; Crime/Real Life; Fly on the Wall; Travel; Misc

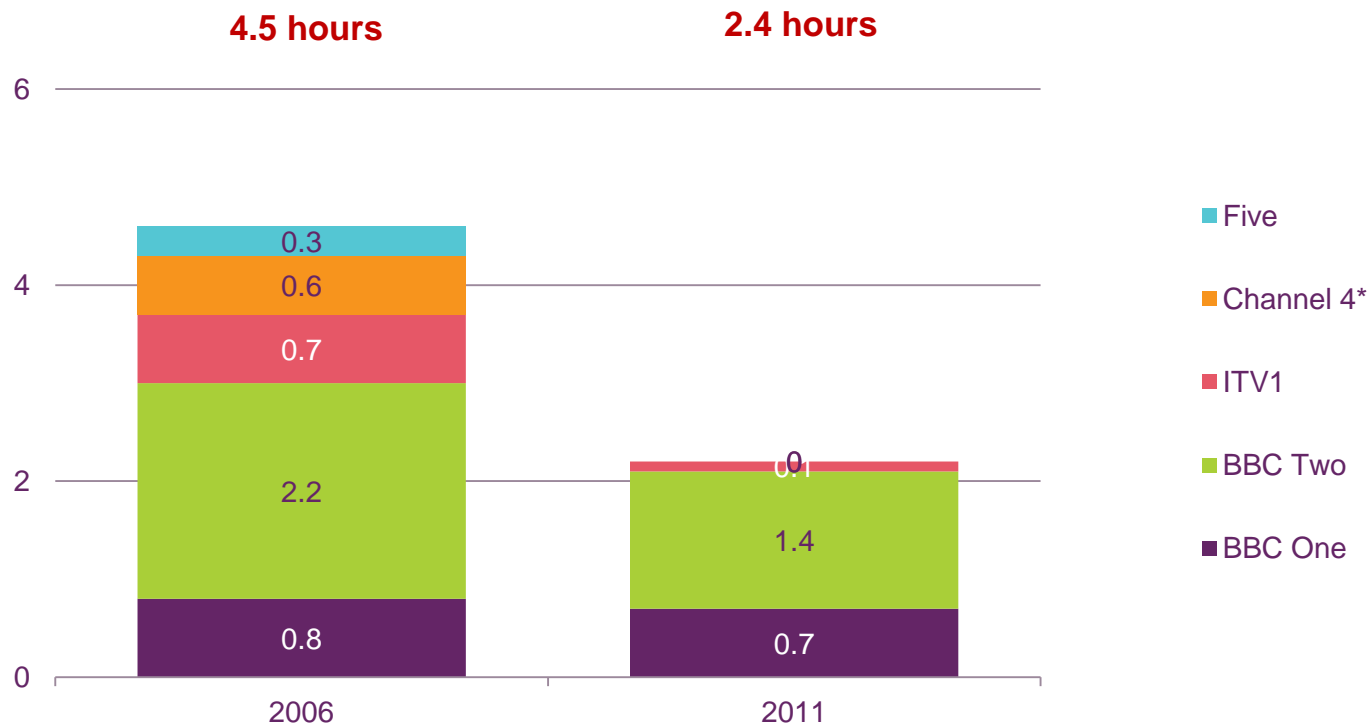
-Specialist Factual = Documentaries – Natural History; Science & Medical; History; Factual Drama. See *Definitions: PSB genres analysis*.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Fig 31 Total hours of viewing of Arts & Classical Music – Main five PSB channels, 2006 vs. 2011



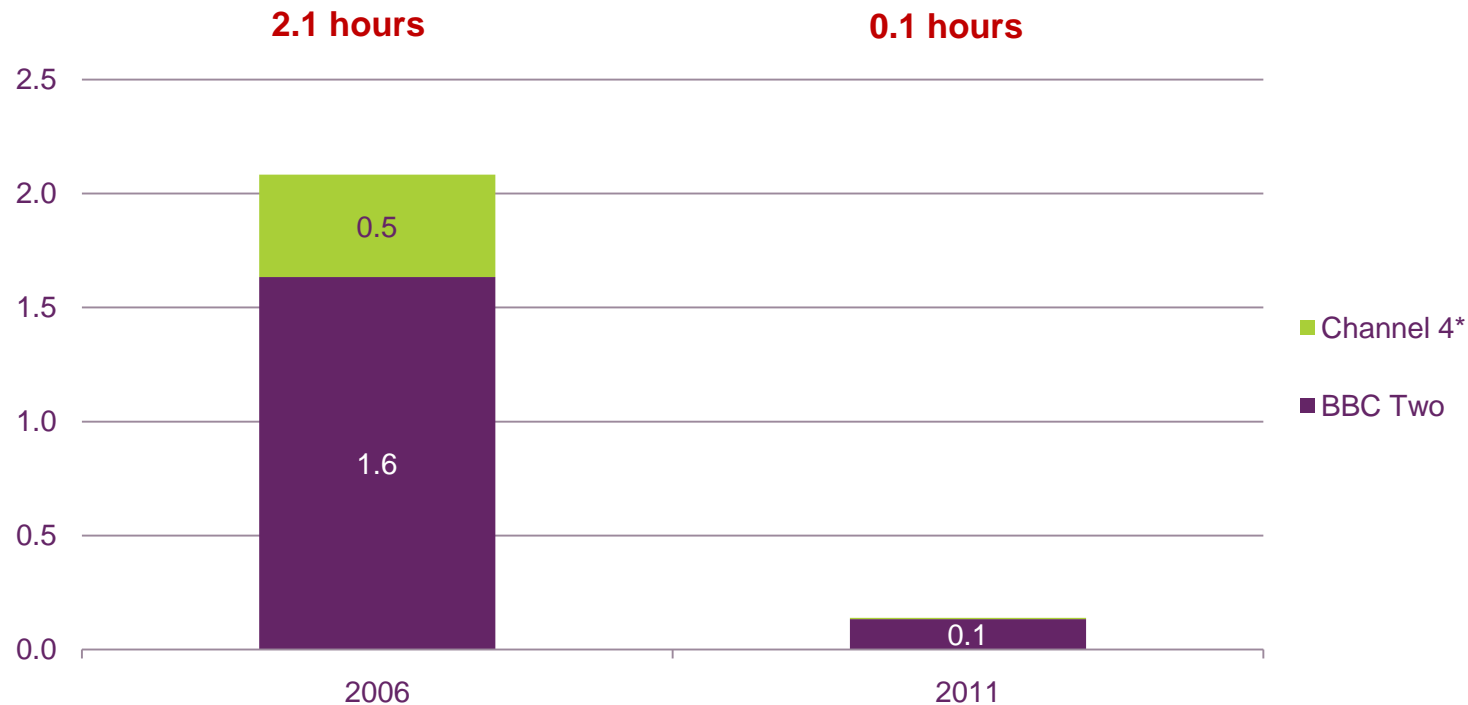
Total hours per year watched by average individual (4+)



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Arts & Classical Music= Arts (All) , Music: Classical Documentary , Music :Classical General. See *Definitions: PSB genres analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Fig 32 Total hours of viewing of Education – Main five PSB channels, 2006 vs. 2011

Total hours per year watched by average individual (4+)



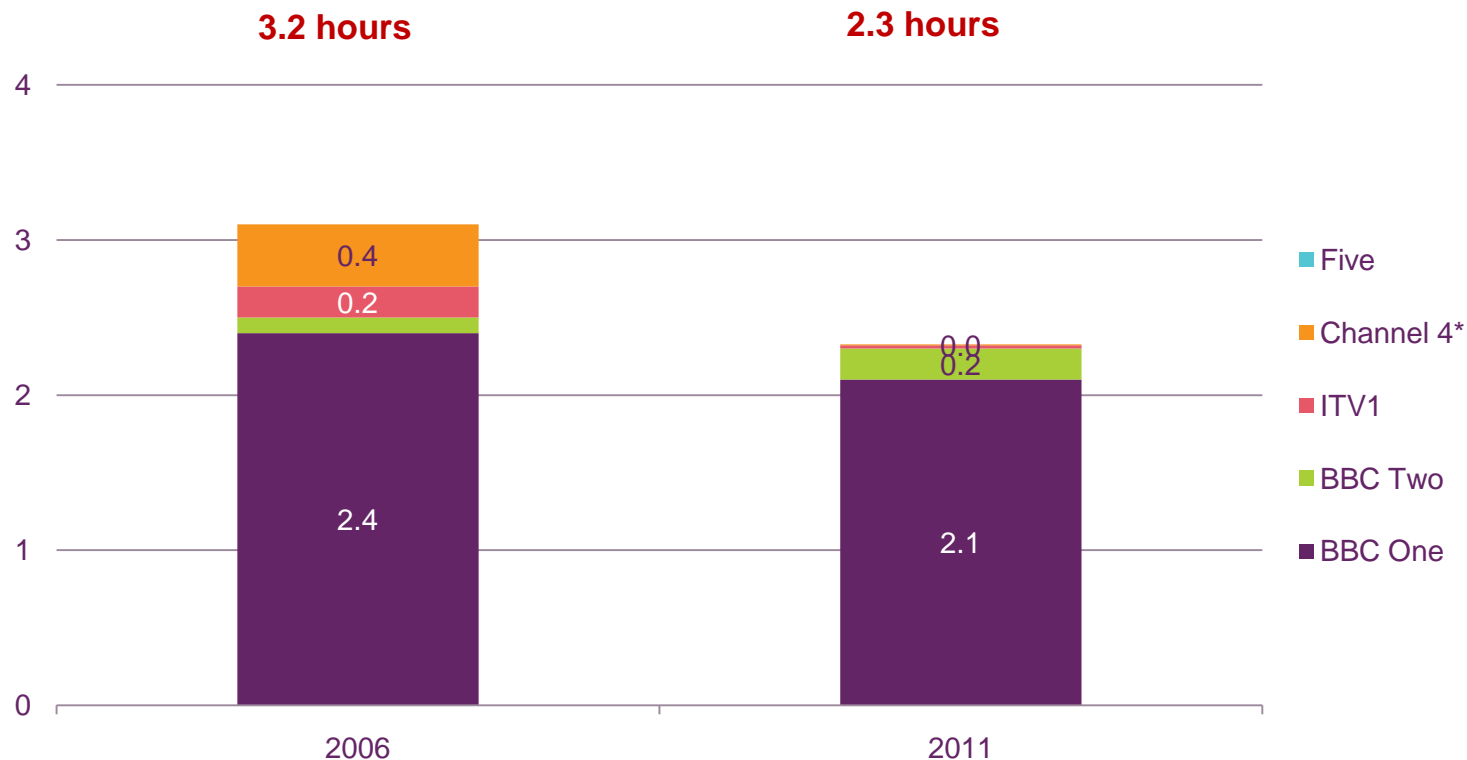
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

-Based on total minutes of viewing of 'Education'. See *Definitions: PSB genres analysis*.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

**Fig 33 Total hours of viewing of Religious programmes
Main five PSB channels, 2006 vs. 2011**

Total hours per year watched by average individual (4+)



Source: BARB, Network, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

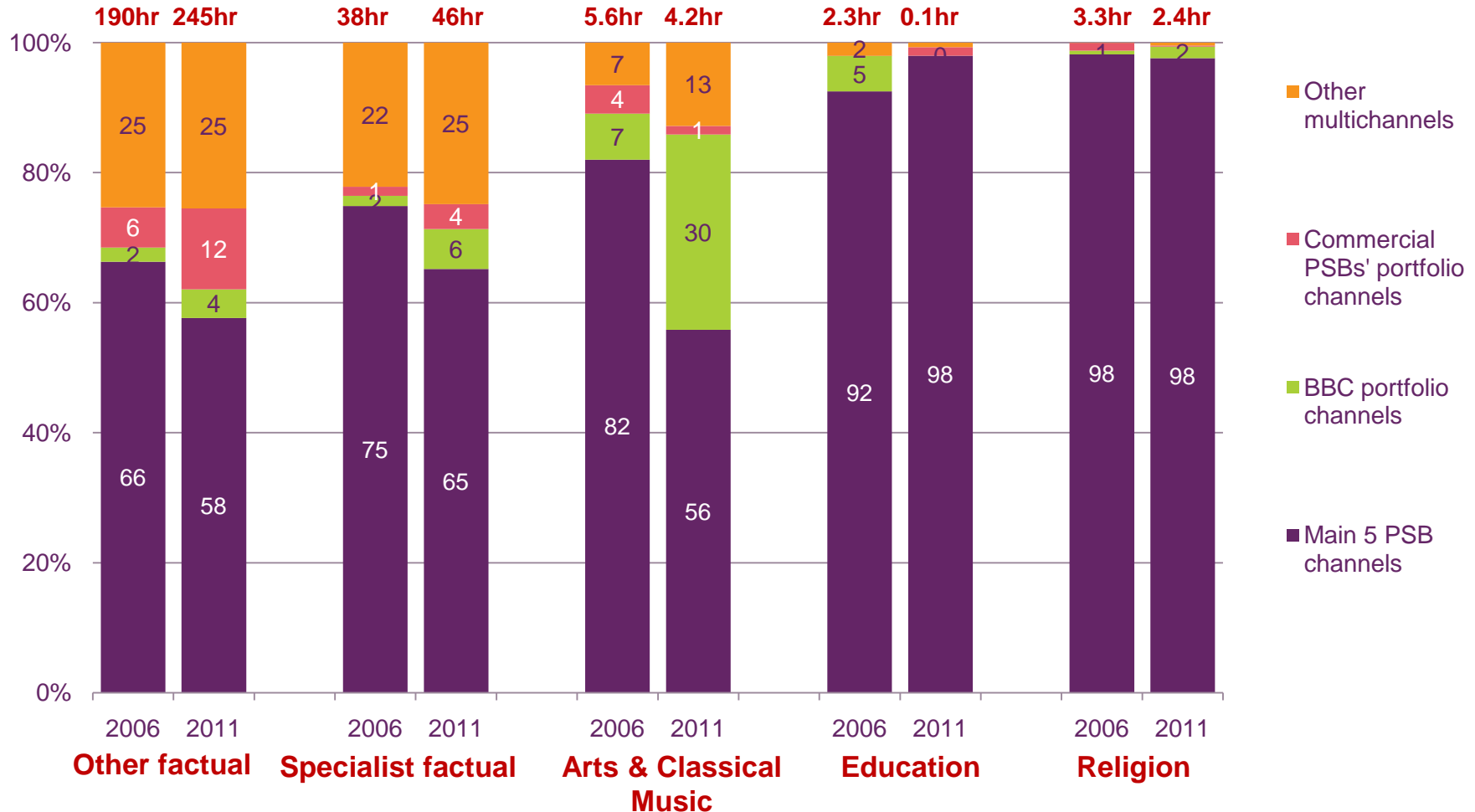
-Based on total minutes of viewing of 'Religious'.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Factual, Arts & Classical Music, Education and Religion,



Fig 34 Share of viewing to genres by channel groups, 2006 vs. 2011



Source: BARB, All Individuals, 2006:Network Plus, 2011:Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Based on total minutes of viewing to each genre groups. See *Definitions: PSB genres analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

UK Drama, UK Soaps, UK Situation Comedy and Sport

Summary: UK Drama, UK Soaps, UK Situation Comedy and Sport; 2006 vs. 2011



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- The total hours spent per individual per year viewing **UK Drama** across the main five PSB channels fell from 80 to 65 hours in 2011. This was as a result of a 12 hour fall across ITV1, and a smaller fall of 2 hours on BBC One. (See Figure 35).
- Viewing to **UK Soaps** across the main five PSB channels also fell, from 74 hours in 2006 to 59 hours in 2011. While ITV1 remains the most viewed channel across this genre, viewing fell from 49 hours to 39 hours. Smaller falls were also seen on BBC One and Five. (See Figure 35).
- The main five PSB channels accounted for 8.1 hours of viewing to **UK Situation Comedy** in 2011, down from 9.3 hours in 2006. This decline was mainly attributable to falls across the BBC channels, while viewing to ITV1 rose from 0.2 to 1.5 hours per year. (See Figure 36).
- Viewing of **Sport** on the main five PSB channels fell from 80 hours in 2006 to 56 hours in 2011. The most notable declines were on BBC One (from 35 hours to 26 hours) and BBC Two (from 21 hours to 13 hours), although viewing also fell across ITV1 and Five. It is important to note that the World Cup football tournament took place during 2006. (See Figure 37).
- Across **all channels**, there was a decline in the share of viewing represented by the main five PSB channels across each of the four genres. Viewing to UK Drama, UK Soaps and UK Situation Comedy increased notably across the Commercial PSB portfolio channels, while Other multichannels accounted for increasing shares of viewing to UK Situation Comedy and Sport. (See Figure 38).

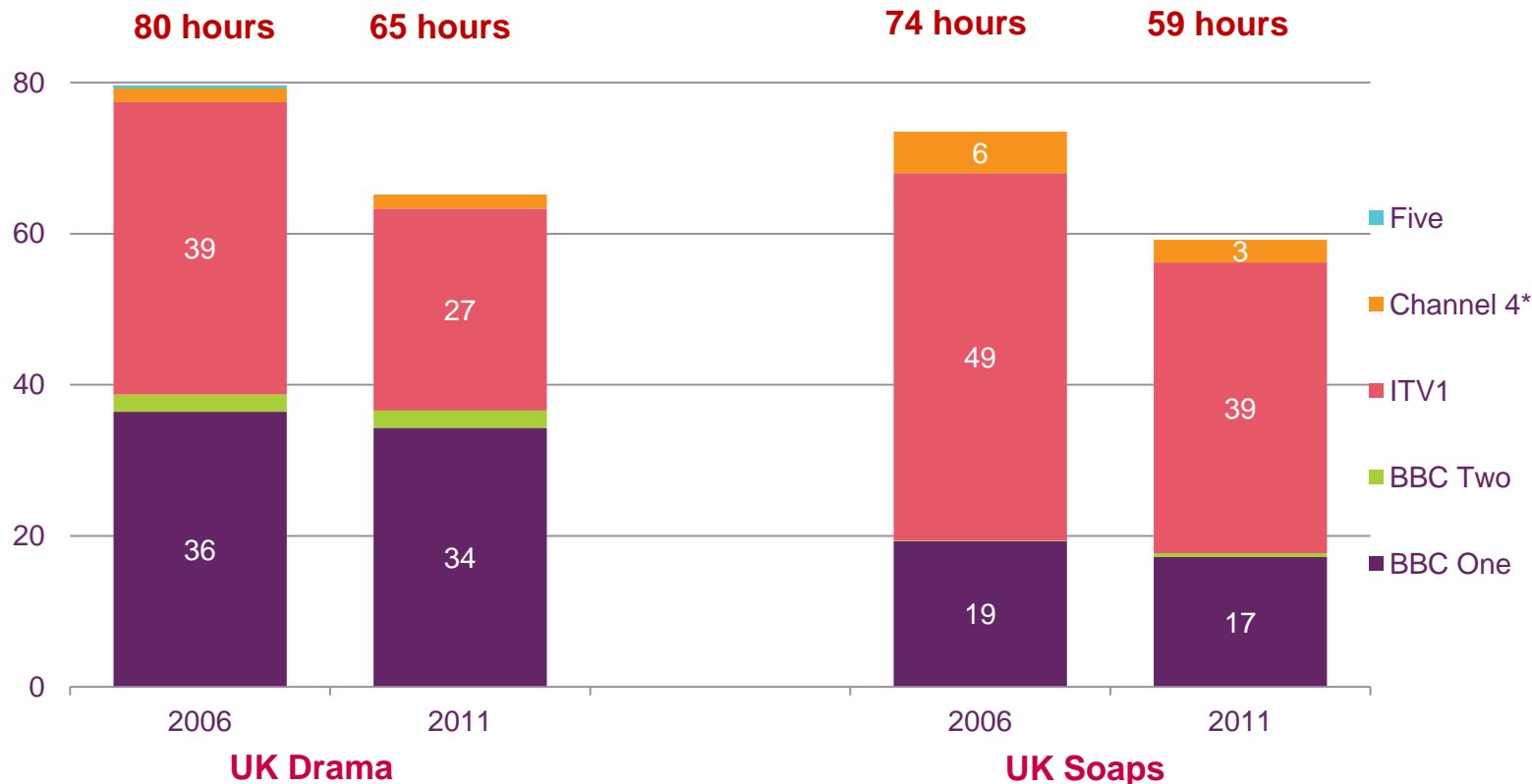
-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of March/April 2012.

UK Drama, UK Soaps, UK Situation Comedy and Sport



**Fig 35 Total viewing hours of UK Drama and UK Soaps
Main five PSB channels, 2006 vs. 2011**

Total hours per year watched by average individual (4+)



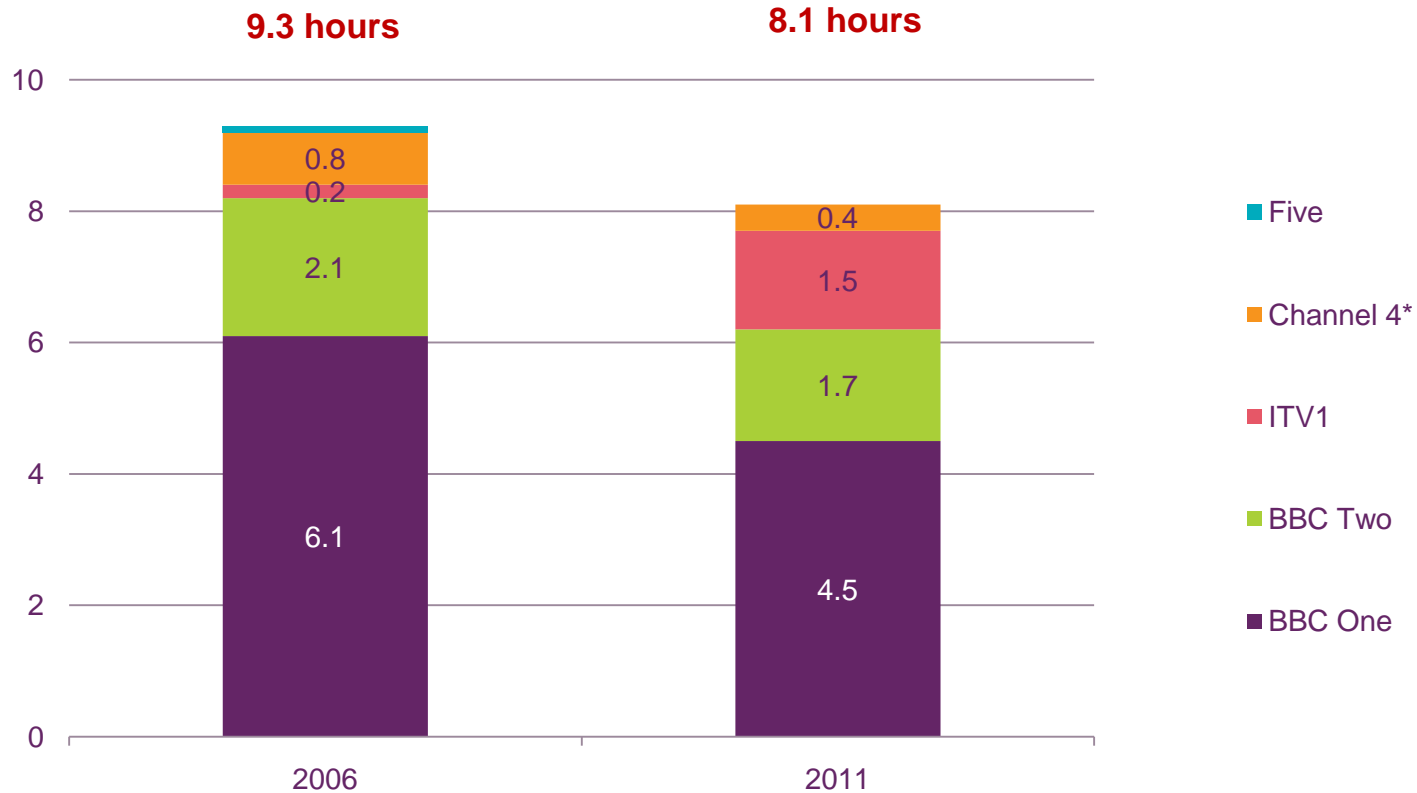
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -UK Drama= 'Drama: Single Plays'-UK + 'Drama: Series/Serials-UK' - UK Soaps= 'Drama: Soaps-UK'. See *Definitions: PSB genres analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

UK Drama, UK Soaps, UK Situation Comedy and Sport



Fig 36 Total viewing hours of UK Situation Comedy - Main five PSB channels, 2006 vs. 2011

Total hours per year watched by average individual (4+)



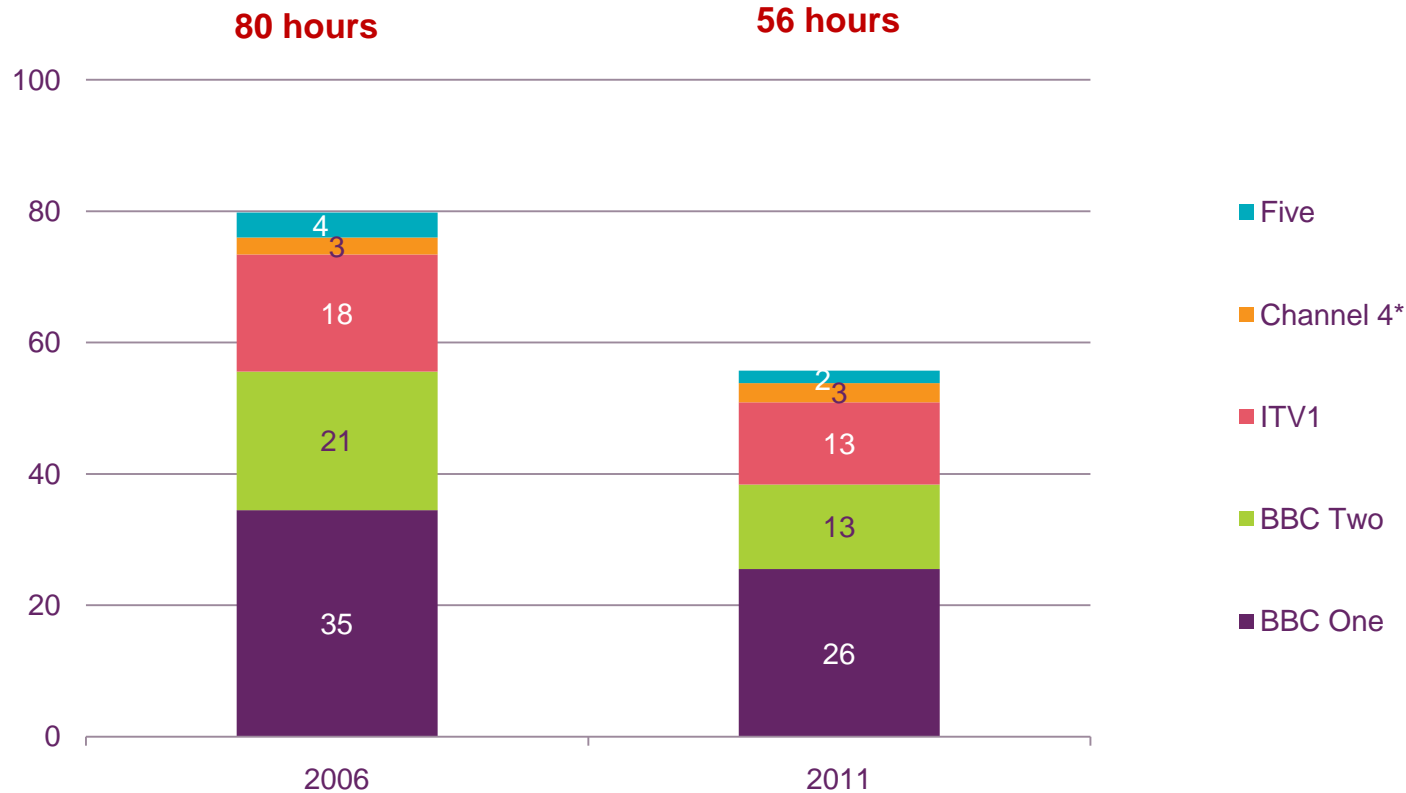
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Based on total minutes of viewing of 'Entertainment: Situation Comedy-UK'. See *Definitions: PSB genres analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

UK Drama, UK Soaps, UK Situation Comedy and Sport



Fig 37 Total viewing hours of Sports - Main five PSB channels, 2006 vs. 2011

Total hours per year watched by average individual (4+)



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

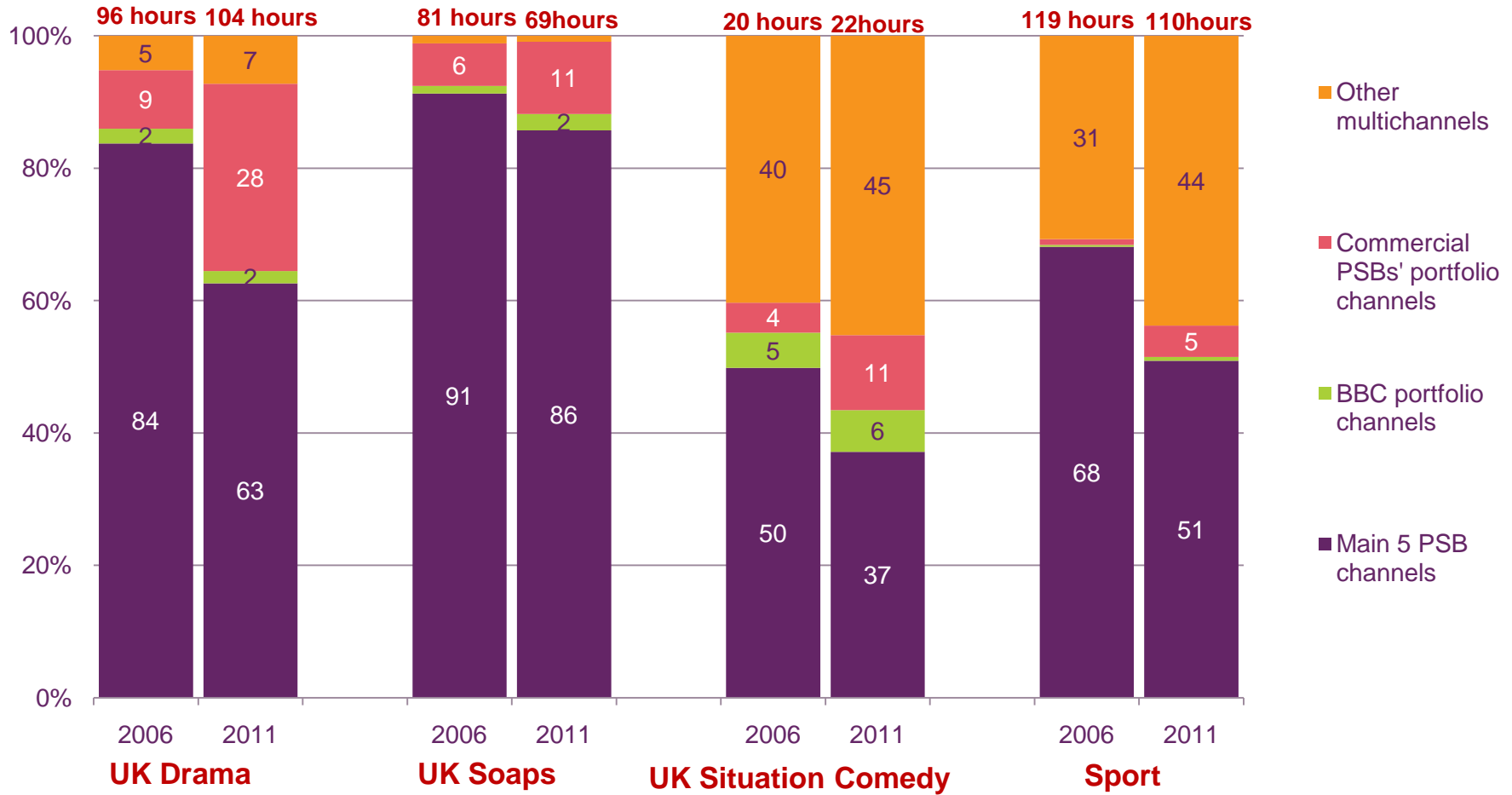
-Based on total minutes of viewing of 'Sport'. See *Definitions: PSB genres analysis*.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

UK Drama, UK Soaps, UK Situation Comedy and Sport



Fig 38 Share of viewing to genres by channel groups, 2006 vs. 2011



Source: BARB, All Individuals, 2006:Network Plus, 2011:Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Based on total minutes of viewing to each genre group. See *Definitions: PSB genres analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Summary: Children's viewing and programming (1)



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- Children aged 4-15 year watched, on average, 17.2 hours of television per week in 2011 – down marginally from 17.6 hours in 2010. (See Figure 39).
- The share of children's total television viewing represented by the main five PSB channels has fallen steadily from 46% in 2006 to 33% in 2011. Over the same period viewing to the BBC digital channels has increased from 7% to 13% and the proportion of viewing accounted for by all other commercial channels has increased from 47% to 54% in 2011. (See Figure 39).
- Data looking at the breakdown in total viewing by genre shows there was an increase in the proportion of children's viewing on the main five PSB channels accounted for by Entertainment programming, the most watched genre amongst this audience. There was also an increase in the proportion of viewing represented by Other Factual and Films, while viewing to Soaps, Sport, Drama and Children's declined. (See Figure 40).
- Similar trends are seen when looking at differences in the viewing habits of younger (4-9 year olds) and older children (10-15 year olds). There are some variations in the proportion of viewing represented by each of the genres. Entertainment, Other Factual and Drama programming represented a greater share of viewing among older children whereas Films and Children's programming on the main five PSB channels represented a greater share of viewing among younger children. (See Figure 41).

-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of March/April 2012.

Summary: Children's viewing and programming (2)



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- Analysis of children's viewing across the individual main PSB channels in 2011 highlights variations in viewing across the each of the channels:
 - **BBC One:** Viewing to National News accounted for 12%, the highest across each of the channels.
 - **BBC Two:** Other Factual (30%) and Children's (20%) programming was most popular on BBC Two.
 - **ITV1:** Entertainment programming accounted for 34% of children's viewing to the channel, the highest proportion across all the main PSB channels. Soaps accounted for 19% – also higher than on the other channels.
 - **Channel 4:** Entertainment (32%) and Other Factual (30%) represented over 50% of children's viewing to the channel. Films accounted for 17% of viewing, compared with an average of 11% across the five main PSB channels combined.
 - **Five:** Films (28%), Children's (22%) and Other Factual (21%) were the most popular genres on Five among children, accounting for 71% of viewing to the channel. (See Figure 42).
- Across the main five PSB channels, BBC Two and Five were the most popular for viewing to the children's genre. The split in viewing across each of the main five PSB channels and the BBC children's channels, CBBC and Cbeebies, shows significant variations in viewing by sub-genre. Factual programming accounted for almost half of all viewing to the children's genre on BBC One and Cartoons/Animation represented over 60% of viewing on ITV1. Pre-school represented the majority of viewing to the children's genre on Channel4, Five and Cbeebies. Drama accounted for over a third of viewing to CBBC while viewing to the children's genre on BBC Two was spread across the sub-genres. (See Figure 43).

-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of March/April 2012.

Summary: Children's viewing and programming (3)



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- Children watched 16 hours of children's programming across the main five PSB channels in 2011 – down from 40 hours in 2006. Viewing fell from 16 hours to 5 hours on BBC2 and from 11 hours to 3 hours on BBC1. Viewing also fell on ITV1, while there was a marginal increase from 5 to 6 hours on Five. (See Figure 44).
- The increased popularity of CBBC and Cbeebies can be seen when looking at the share of viewing to the children's genres across all channels represented by each of the channel groups. The proportion of viewing represented by the main five PSB channels fell significantly from 20% in 2006 to 7% in 2011. Over the same period viewing to the BBC Portfolio channels increased from 23% to 34% in 2011. The shares represented by the Commercial PSB portfolio channels and Other multichannels remained fairly stable. Similar trends were noted across younger and older children. (See Figure 45).

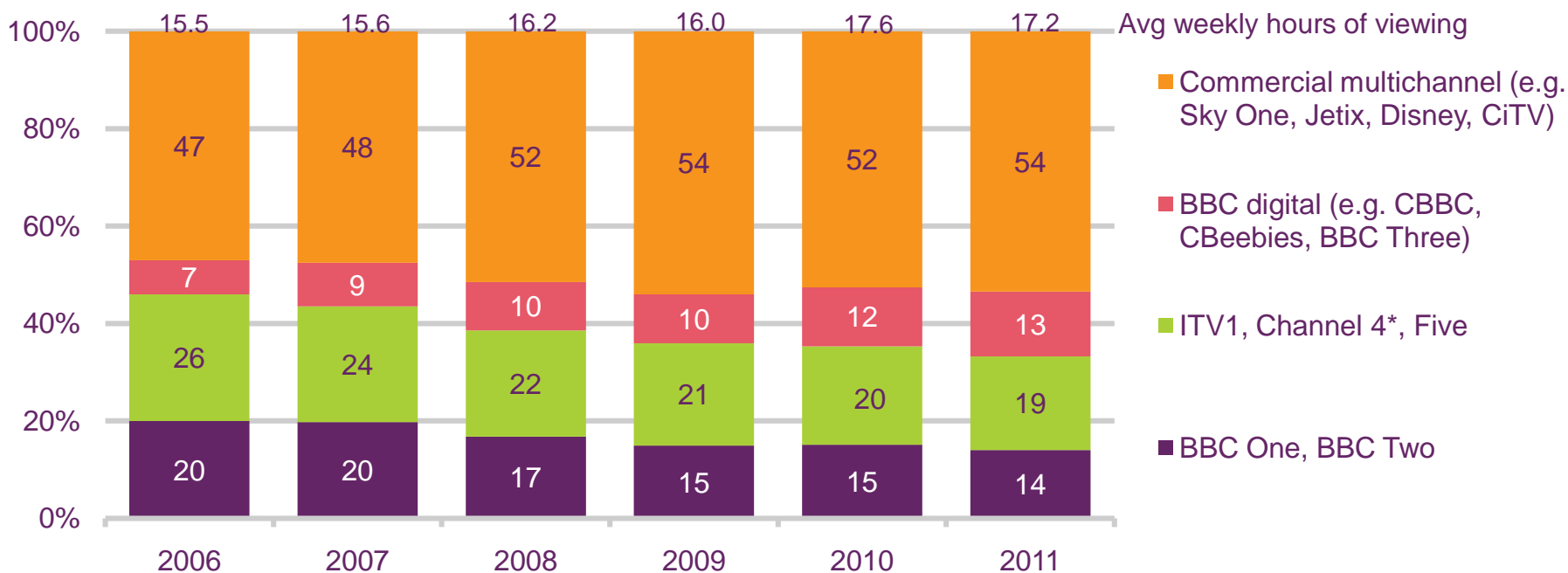
-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of March/April 2012.

Children's viewing and programming



Fig 39 Children's total weekly viewing by channel type, 2006-2011

Proportion of weekly viewing (%)



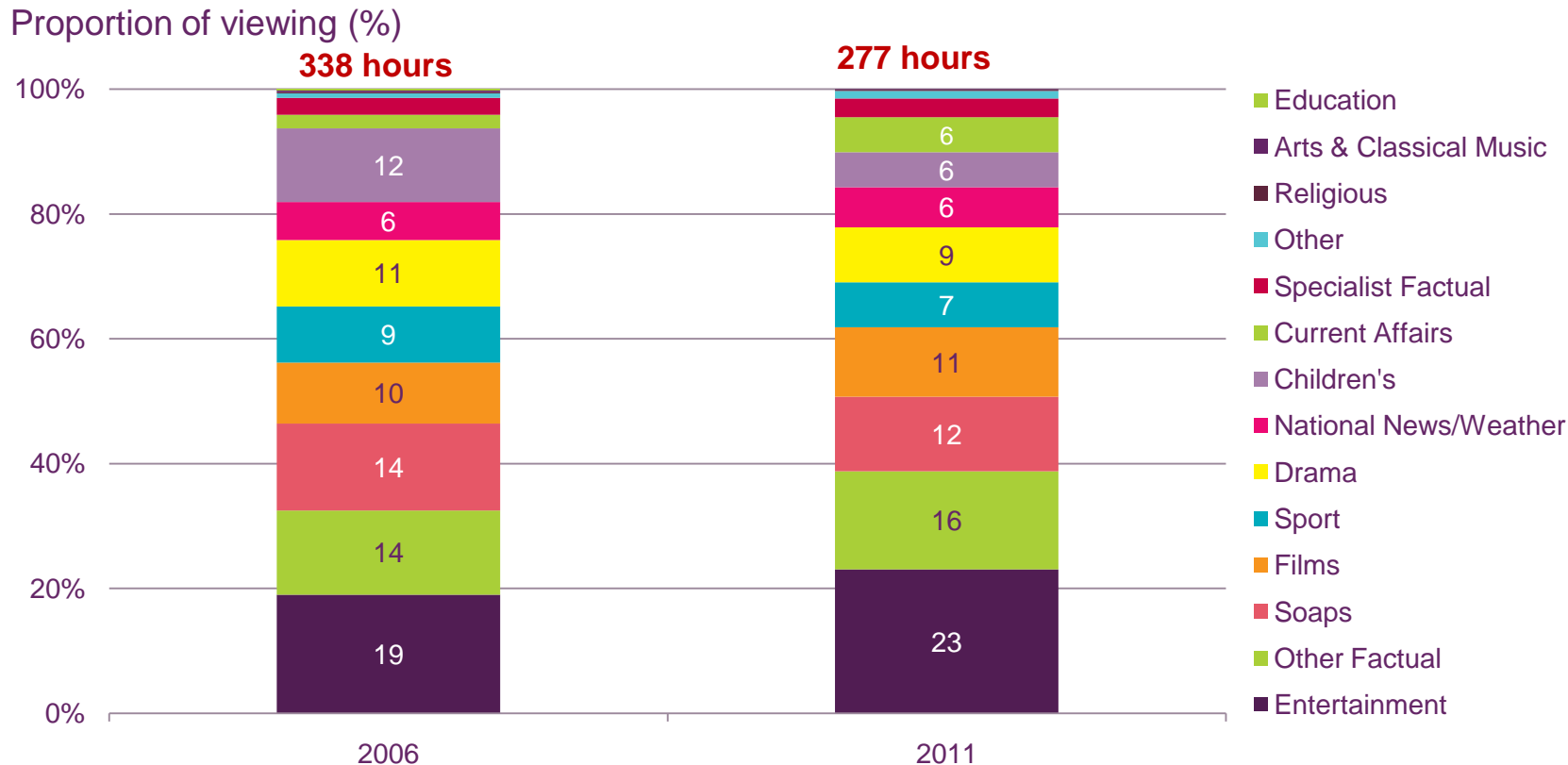
Source: BARB, All children (4-15), Network.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Children's viewing and programming



Fig 40 Children's viewing by genre on the main five PSB channels, 2006 vs. 2011

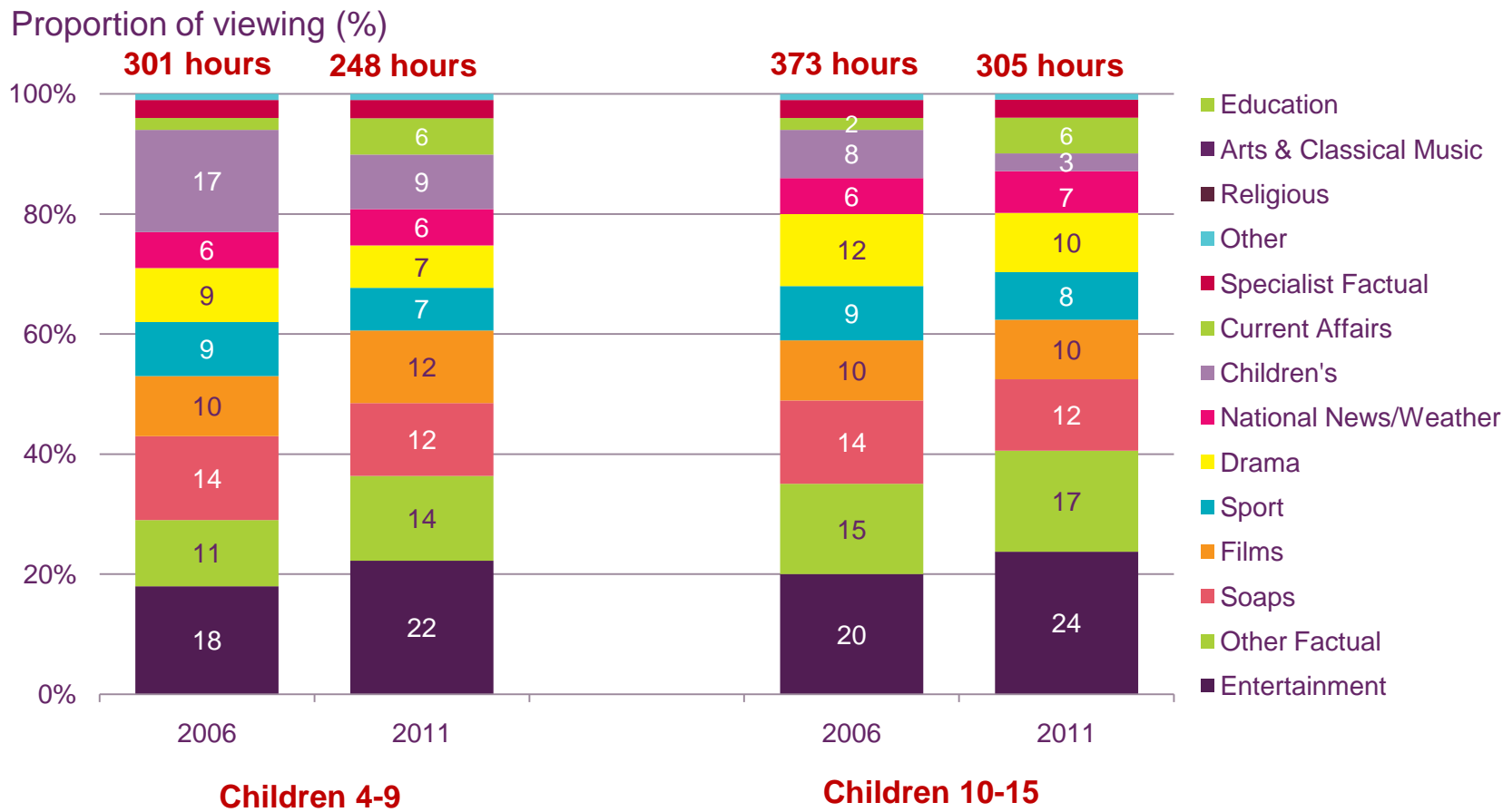


Source: BARB, All children (4-15), Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Network viewing-excludes nations/regions programming. See *Definitions: All genres analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Children's viewing and programming



Fig 41 Children's viewing by genre on the main five PSB channels, 2006 vs. 2011

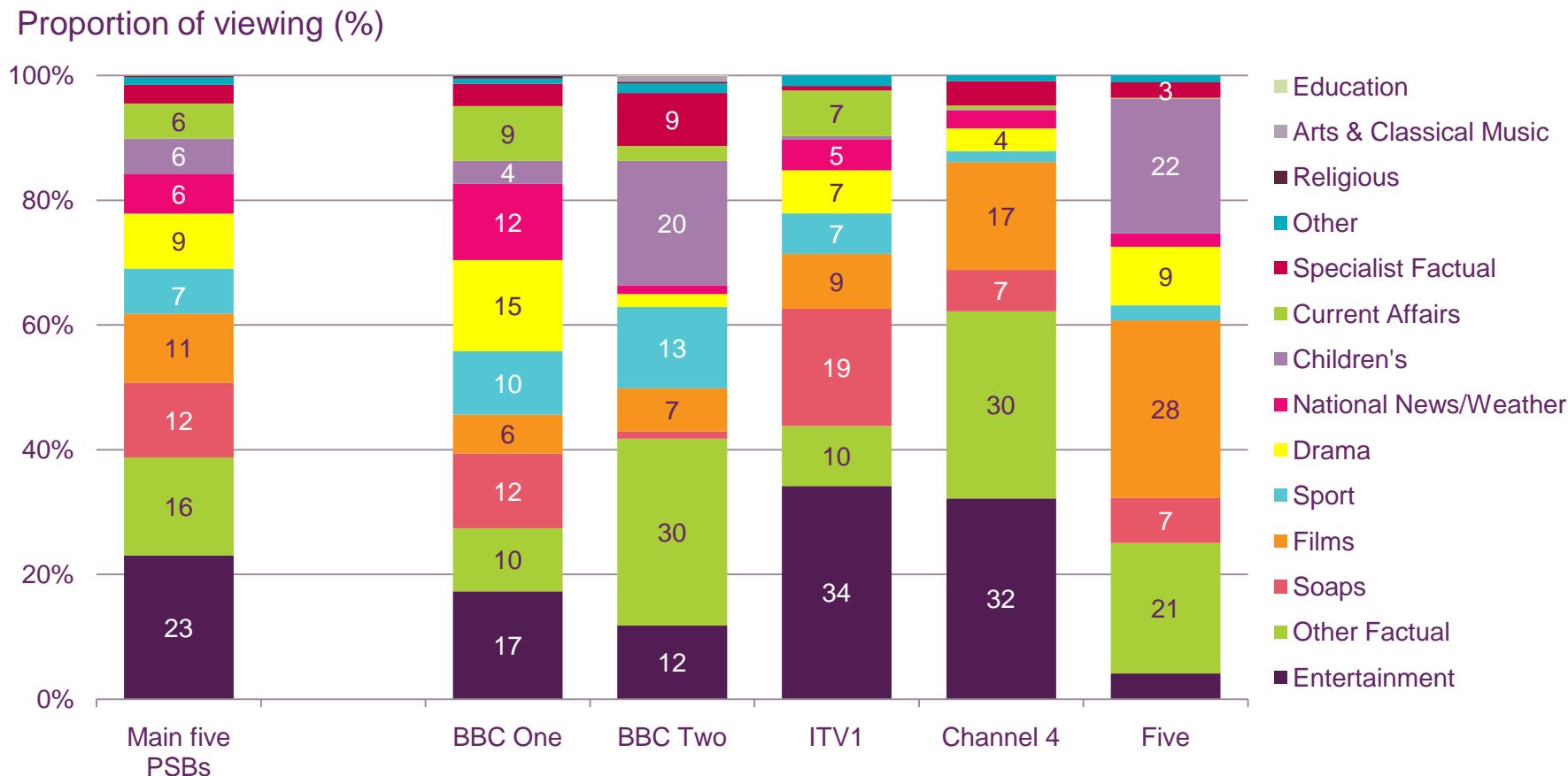


Source: BARB. Children 4-9, Children 10-15, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Network viewing-excludes nations/regions programming. See *Definitions: All genres analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Children's viewing and programming



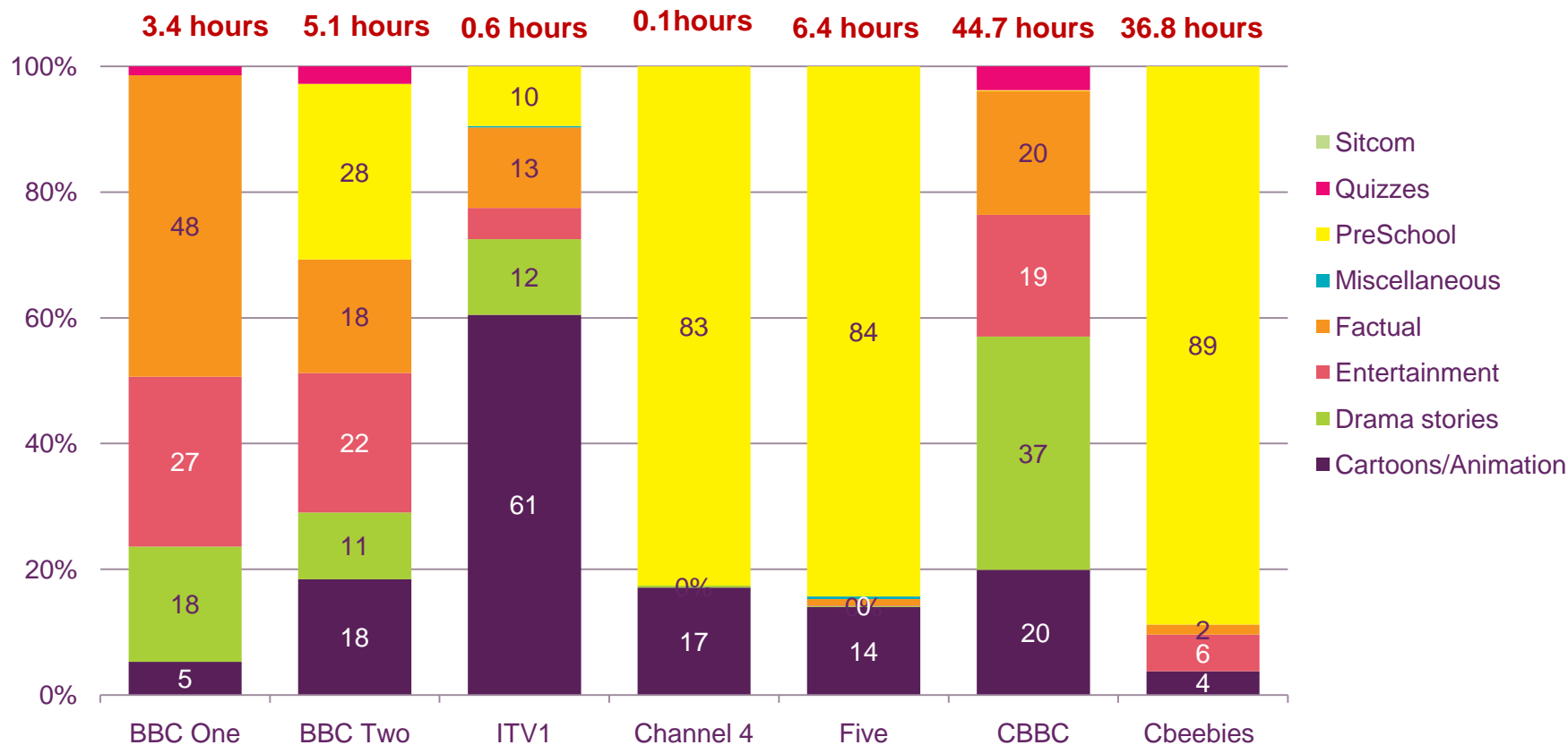
Fig 42 Children's viewing by genre on the main five PSB channels by channel, 2011



Source: BARB. All Children (4-15), Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Network viewing-excludes nations/regions programming. See *Definitions: All genres analysis*.

Fig 43 Children's viewing of the Children's genre by subgenre, 2011

Proportion of viewing (%)

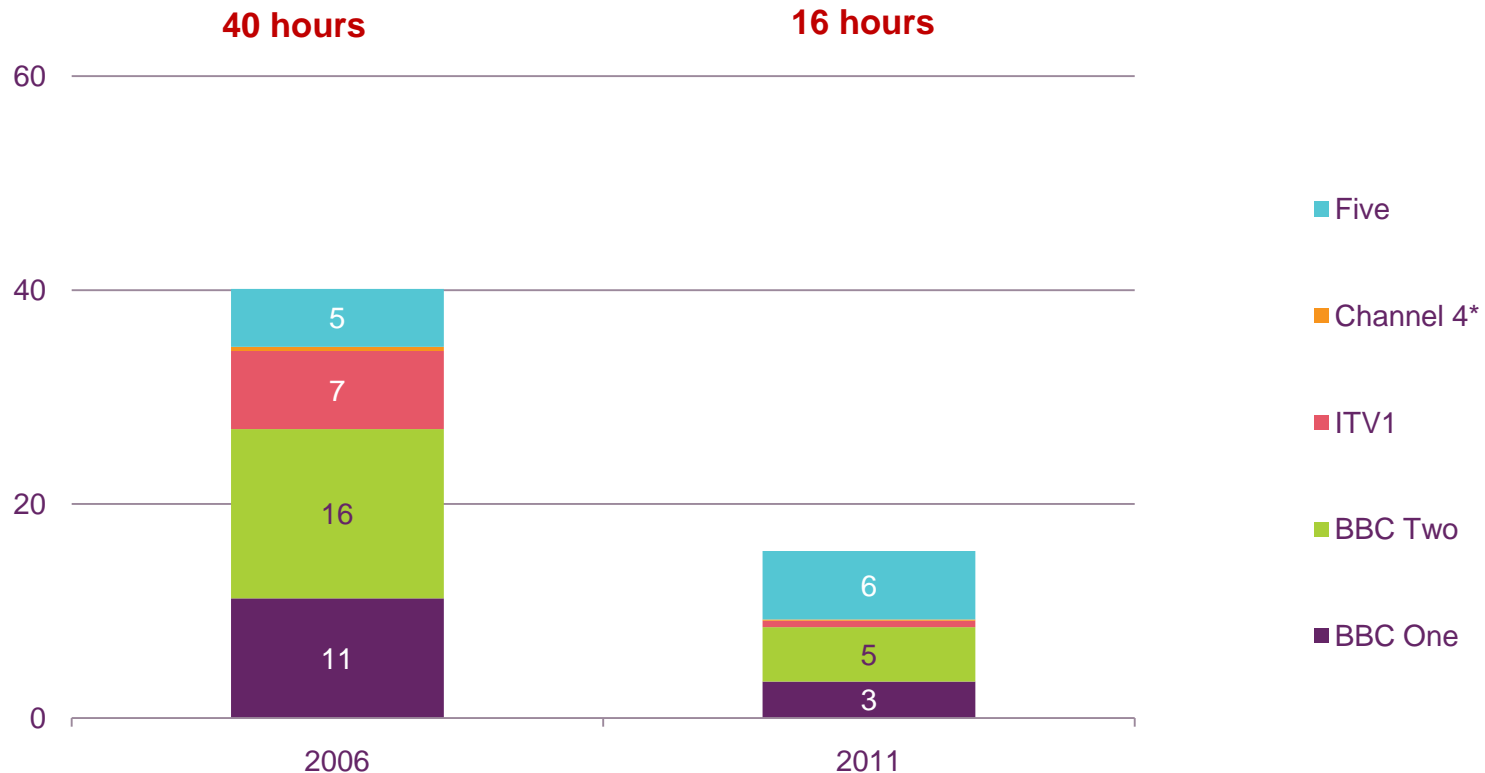


Source: BARB, All children (4-15), Network.

-Based on total minutes of viewing to 'Children's'. Definitions: PSB genres analysis.

Fig 44 Children's viewing hours of Children's genre - Main five PSB channels - 2006 vs. 2011

Total annual hours of viewing by average child



Source: BARB. 2006: Children, Network

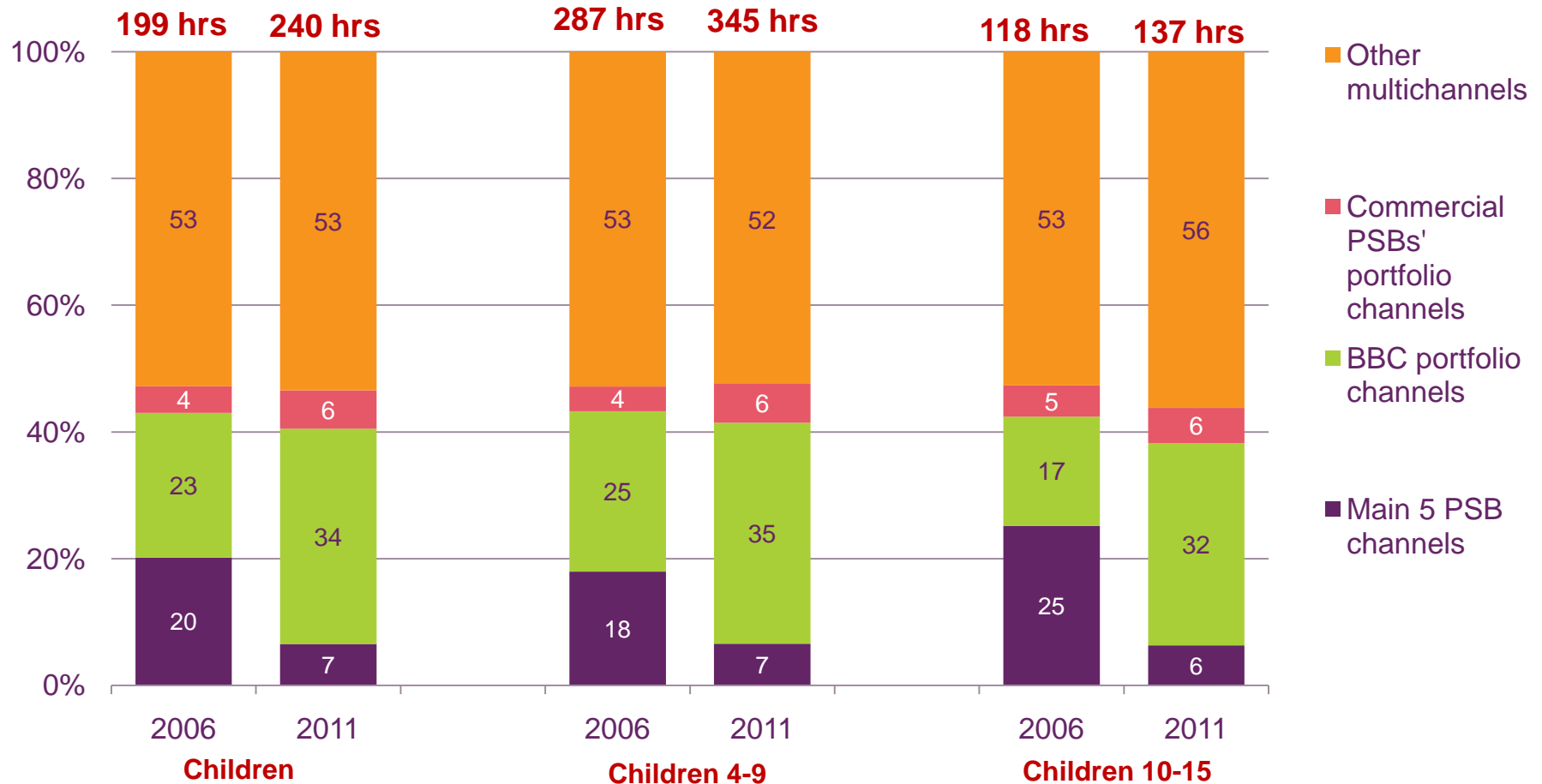
-Based on total minutes of viewing of 'Childrens'. See *Definitions: PSB genres analysis*.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Children's viewing and programming



Fig 45 Share of viewing to the Children's genre by channel groups, 2006 vs. 2011



Source: BARB, Children (4-15), 2006:Network Plus, 2011:Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Based on total minutes of viewing to Children's. See *Definitions: PSB genres analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

News analysis section

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Summary: National News and Current Affairs, 2006 vs. 2011 (1)



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

It is important to note viewing of National News (and to a lesser extent Current Affairs) programming can be significantly driven by timely events.

- BBC1 has the greatest level of reach in a average week of all the PSB channels with 65% or 32m people. ITV have the second highest share with 41% or 20m people, although this is lower than in 2010 (43% or 21m people). BBC News was the only other channel in 2011 that increased its share in an average week rising from 18% (9m) to 20% (10m).
- Between 2006 and 2011, viewing to **National News** programming on the main five PSB channels declined from 91 hours a year in 2006 to 86 hours a year in 2011 (see Figure 46). While viewing on BBC One increased by 10 hours a year to 63 hours in 2011, this overall decline was driven by a fall in viewing on ITV1 from 26 hours to 15 hours. Viewing fell by an hour on each of BBC Two, Channel 4 and Five.
 - The age profile of news tends to be skewed towards older age groups, with viewers aged 45 or over accounting for 76% of viewing across the main five PSB channels. Profiles for each of the five PSB channels were fairly similar, although BBC Two and Channel 4 attracted slightly younger audiences. BBC Two and Channel 4 news programmes also attracted a greater proportion of ABC1 viewers compared with ITV1 and Five. (See Figures 47 & 48).
 - While there has been a decline in news viewing on the main five PSB channels, the increased viewing to the 24-hour news channels , BBC News and Sky News, has led to an upward trend in news consumption (see Figure 49).

-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of March/April 2012.

- See *Definitions: PSB genre analysis*.

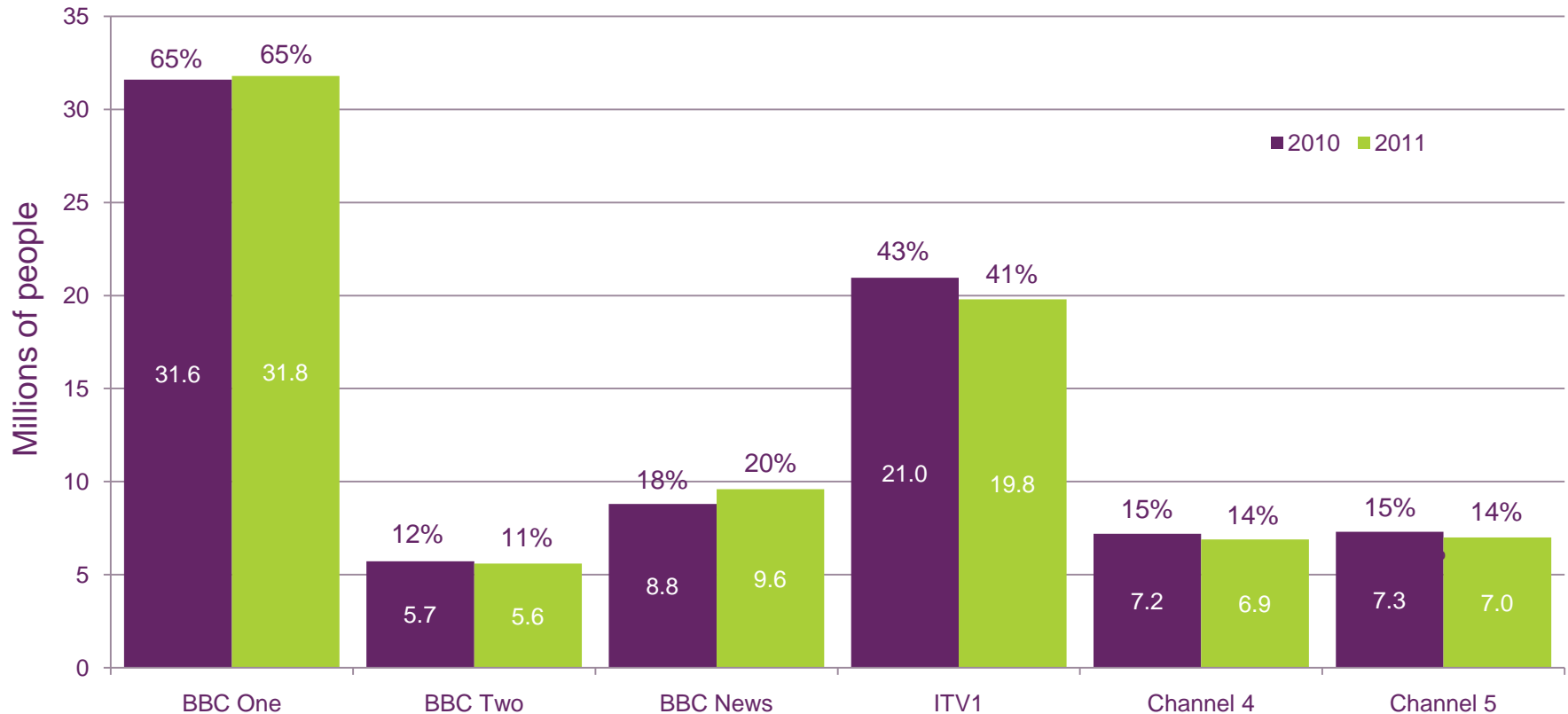
Summary: National News and Current Affairs, 2006 vs. 2011 (2)

- Between 2006 and 2011, overall hours of viewing to **Current Affairs** on the main five PSB channels increased from 33 hours to 53 hours, with viewing increasing by 10 hours a year on both BBC One and ITV1. (See Figure 50).
- Analysis of National News and Current Affairs consumption across **all channels** shows the fall in news viewing on the main five PSB channels and the growth in viewing on BBC portfolio channels and other multichannels. While the amount of current affairs viewing increased across the main five PSB channels, there was a fall in the share represented by these channels as there was an overall increase in viewing to this genre. (See Figure 51).

- Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of March/April 2012.

- See *Definitions: PSB genre analysis*.

Fig 46a Average weekly reach of National and International News – by channel group



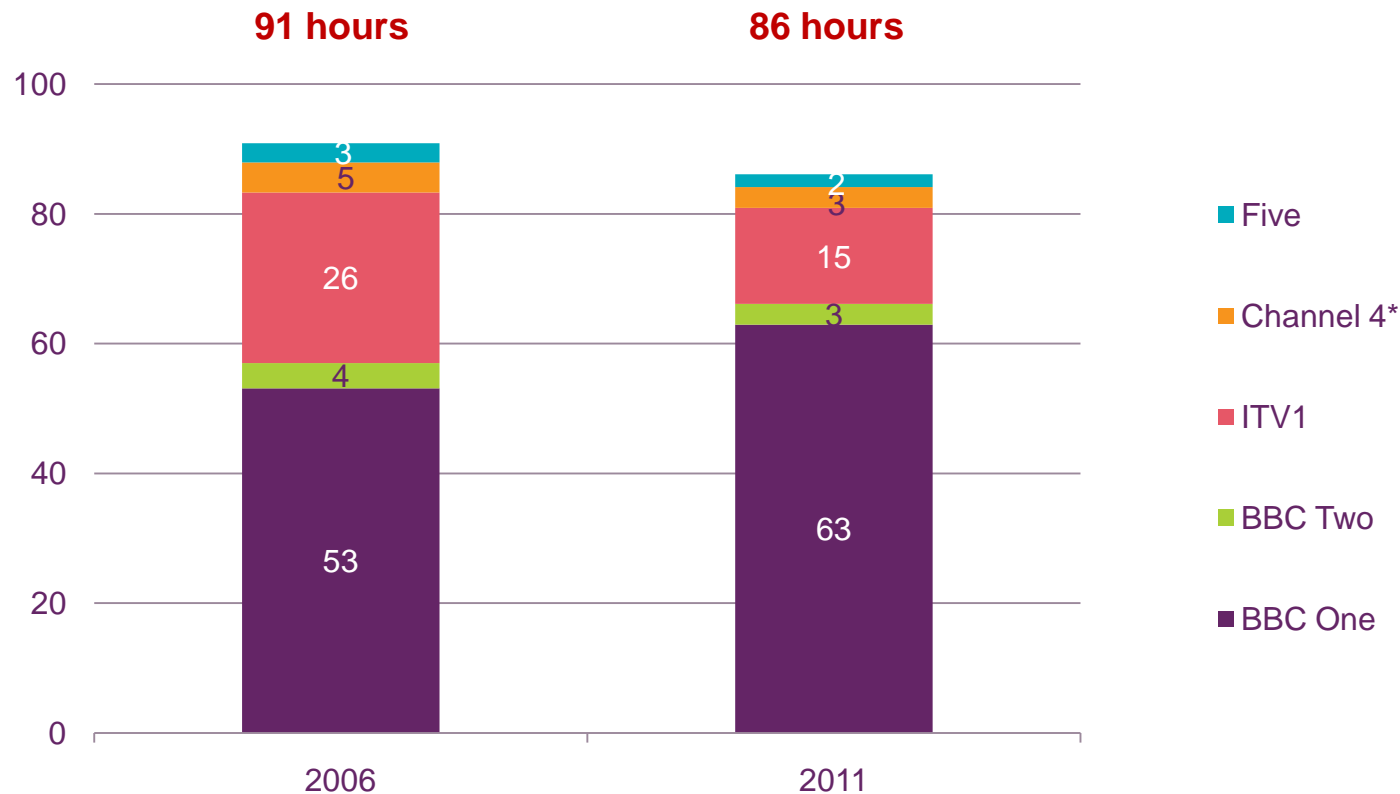
Source: BARB, All Adults 16+, National/International News genre. Reach criteria = 3 consecutive minutes.

Note: S4C and ITV News channel excluded from this analysis.

ITV = ITV1, ITV1+1, ITV1 HD, ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1. C4= C4, C4+1, E4, E4+1, More 4, More 4+1, Five= Ch5, 5*, 5*+1, 5 USA, 5 USA+1 2010-2011 data based on Network.

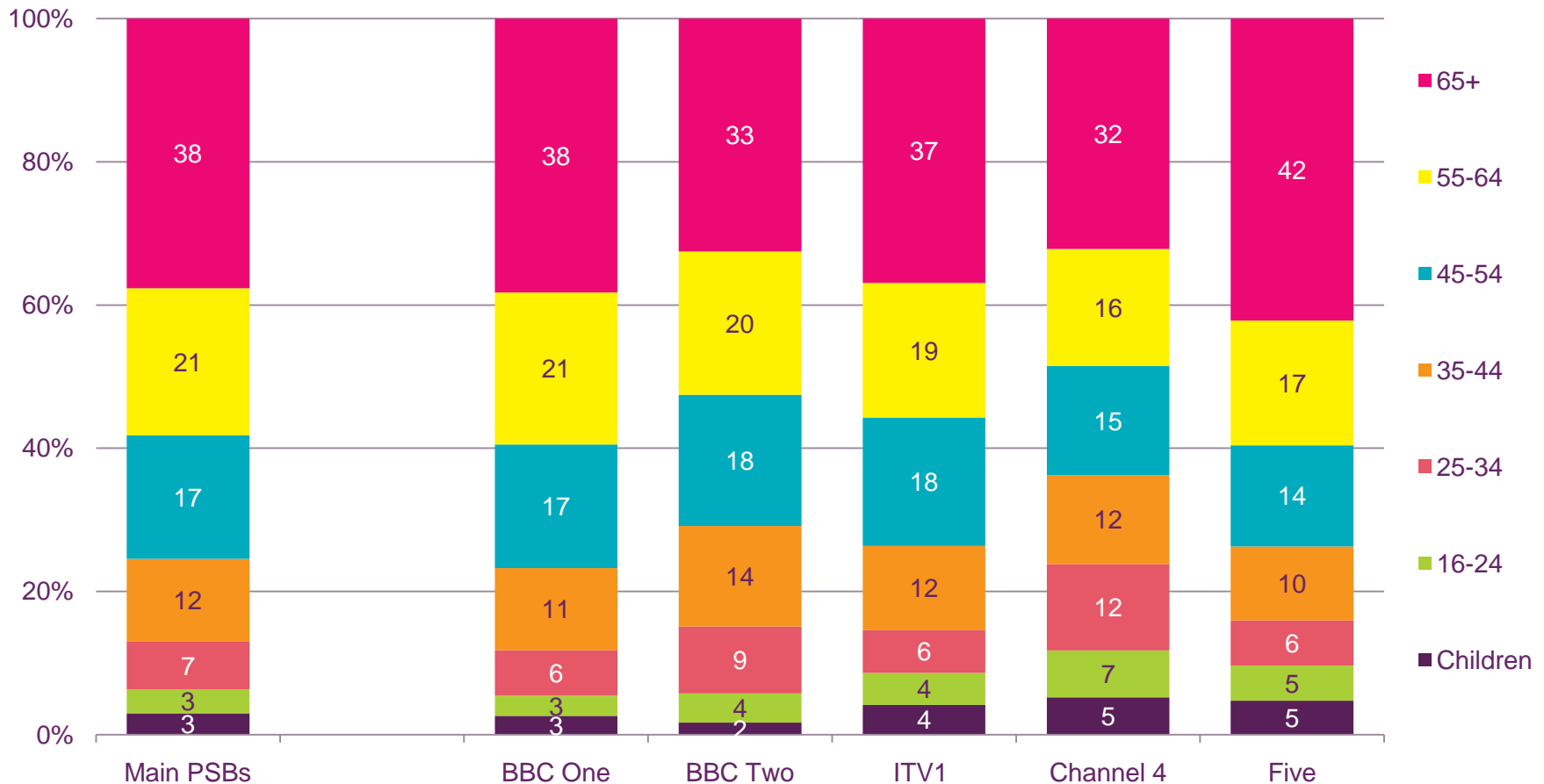
Fig 46b Total viewing of National News – Main five PSB channels only, 2006 vs. 2011

Total hours per year watched by average individual (4+)



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Based on total minutes of viewing of 'News: National/International'. See *Definitions: PSB genre analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Fig 47 Age profile of National News viewers, 2011

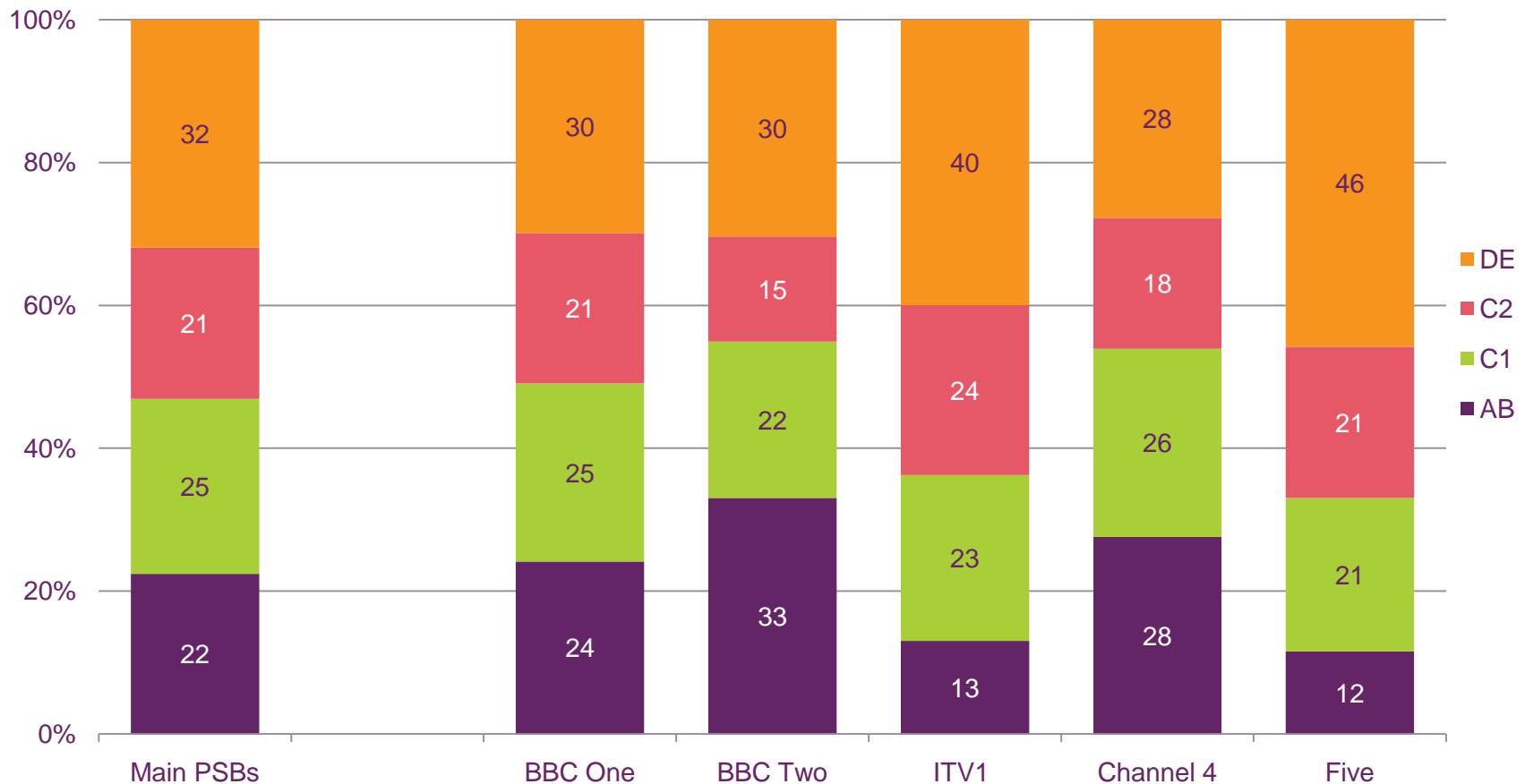


Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

Profile data calculated on a base of All Individuals.

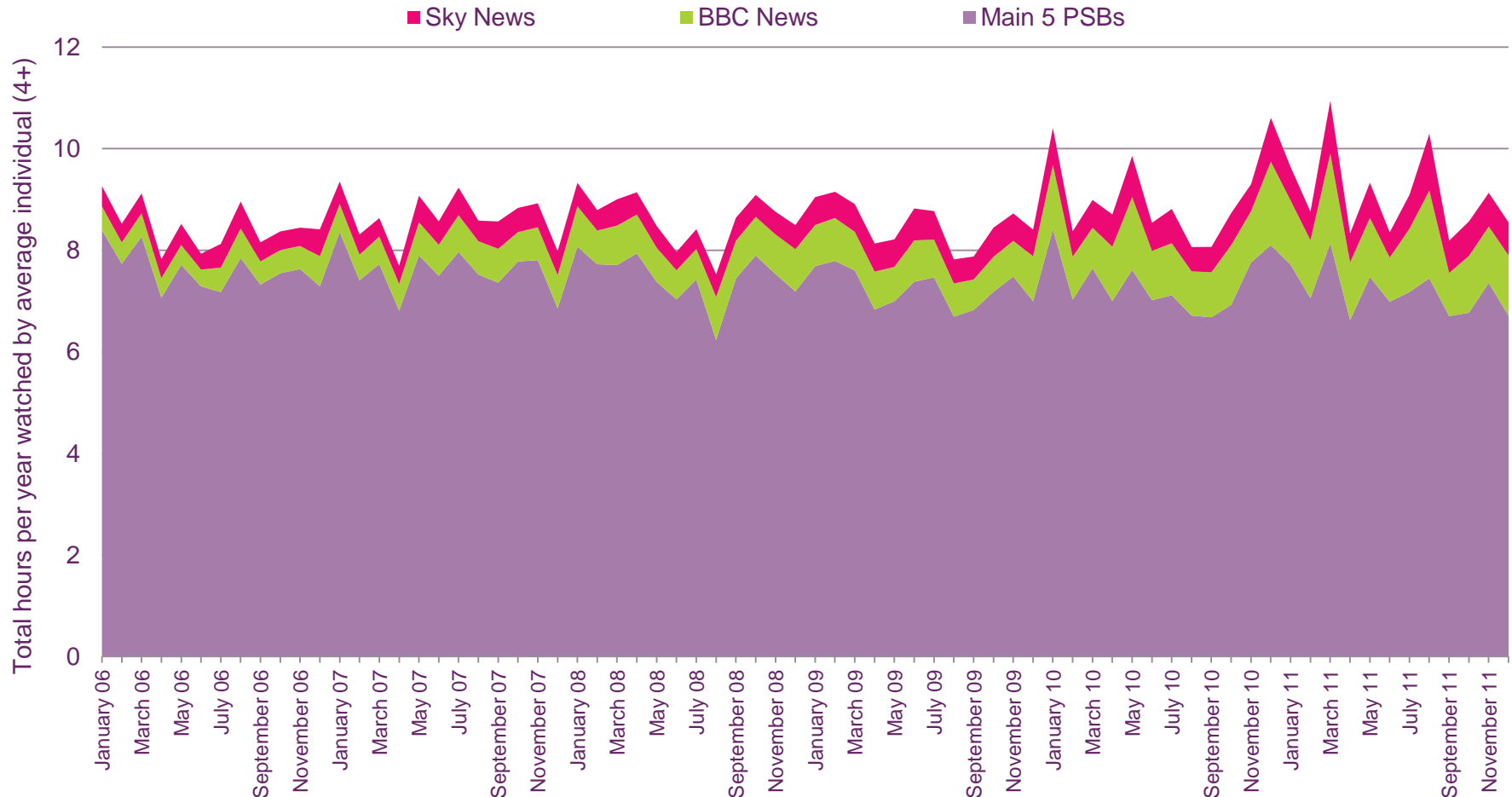
-Based on viewing of 'News: National/International'. See *Definitions: PSB genre analysis*.

Fig 48 Socio-economic profile of National News viewers, 2011



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five). Profile data calculated on a base of All Individuals.
 -Based on viewing of 'News: National/International'. See *Definitions: PSB genre analysis*.

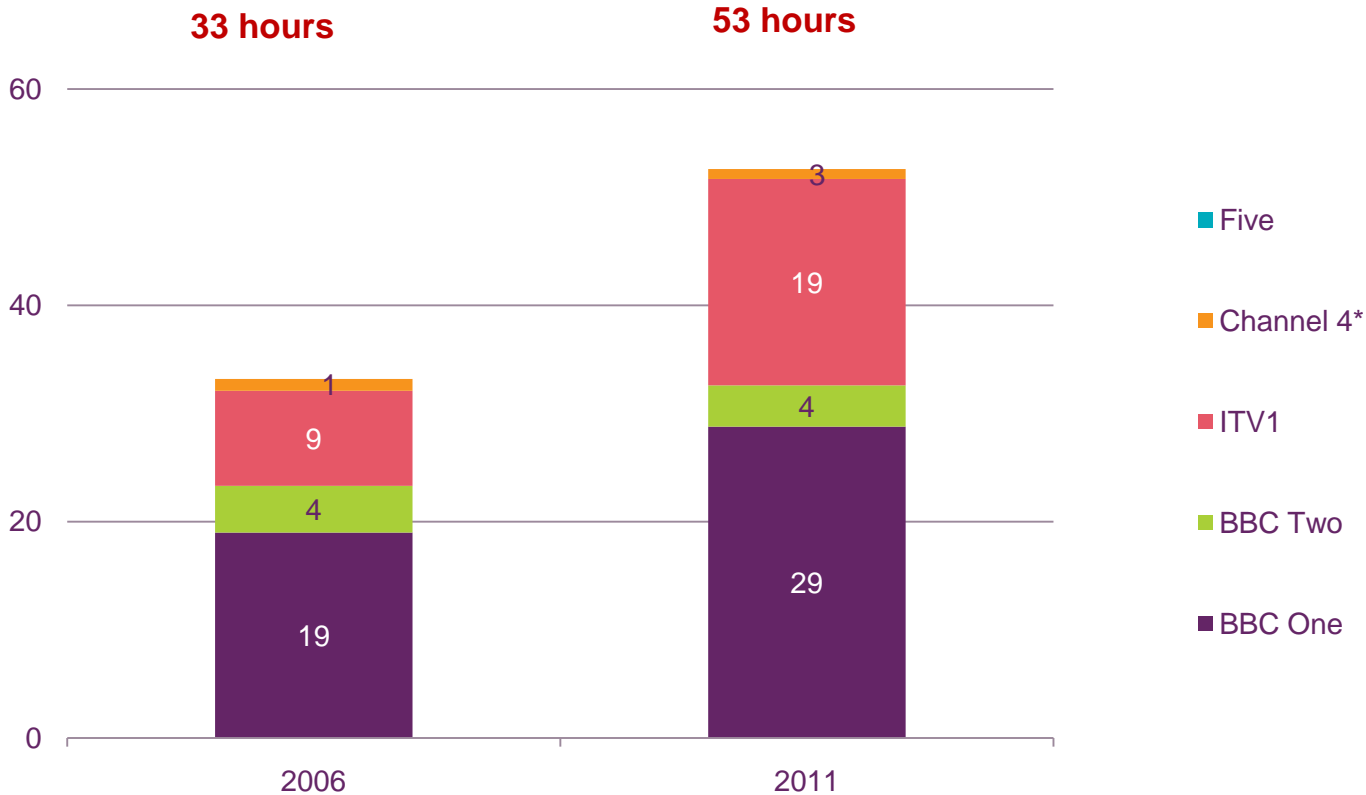
Fig 49 Total viewing to National News across the main five PSB channels and rolling news services, 2006-2011



Source: BARB, All Individuals. 2006-2009: Network Plus/ 2010+: Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).
 -Based on total minutes of viewing of 'News: National/International'. See *Definitions: PSB genre analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Fig 50 Total viewing of Current Affairs - Main five PSB channels only, 2006 vs. 2011

Total hours per year watched by average individual (4+)

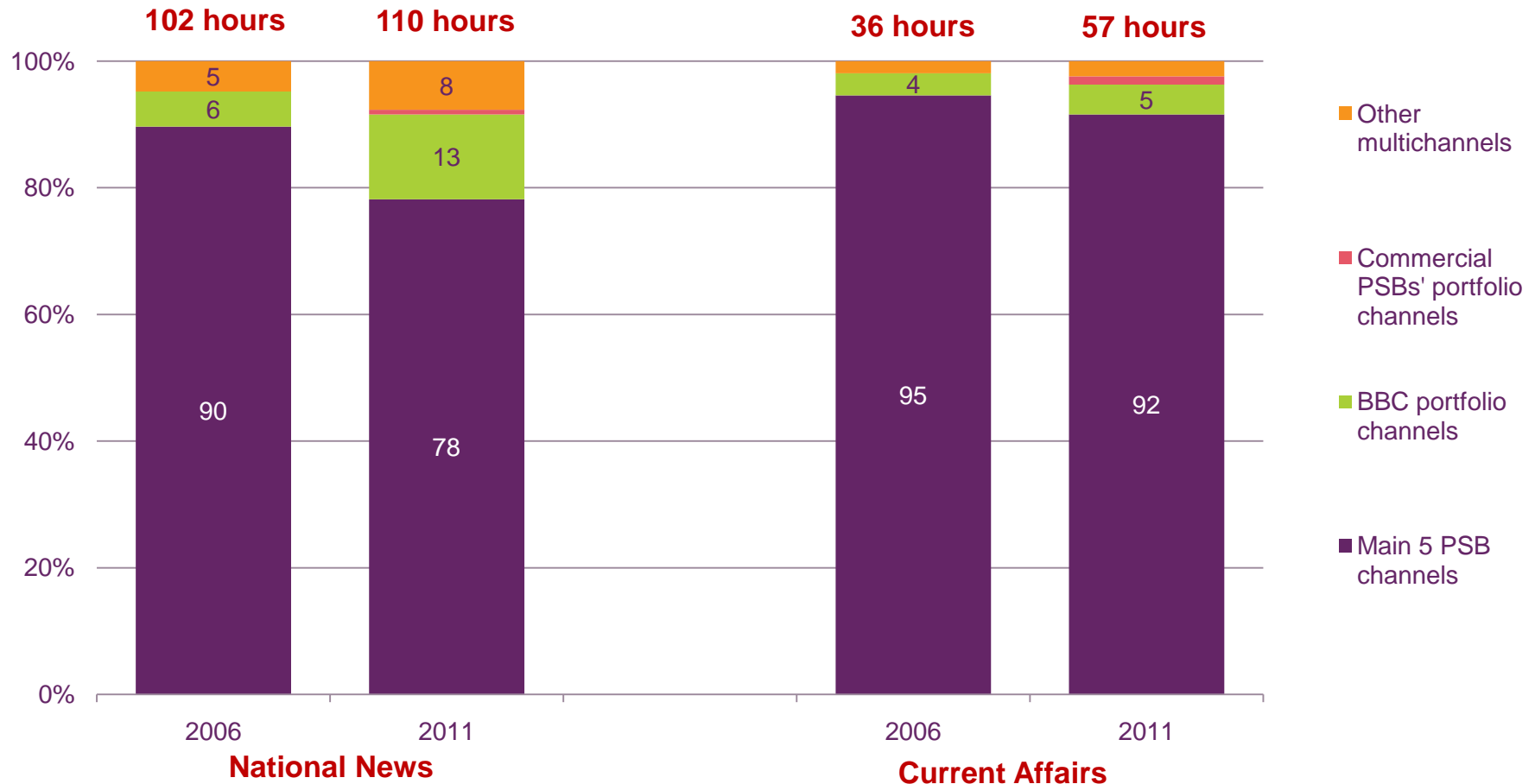


Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

-Based on total minutes of viewing of 'Current Affairs'. See *Definitions: PSB genre analysis*.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Fig 51 Share of viewing to National News and Current Affairs by channel groups, 2006 vs. 2011



Source: BARB, All Individuals, 2006:Network Plus, 2011:Network.

-Based on total minutes of viewing of 'News:National/International' and Current Affairs' genres across all channels. See Definitions: PSB genre analysis.

-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Summary: Nations/regions News (1)



A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels. In addition, there was some re-defining of geographic borders. As a result data pre and post data are not strictly comparable and should be considered with caution.

It is important to note viewing of News programming can be significantly driven by timely events.

- Across the UK in 2011, the average individual watched a total 86 hours of National News and a total of 27 hours of nations/regions news. Time spent watching these two news genres varied across the devolved nations and English regions.
- Devolved nations:
 - Viewers in Scotland spent more time watching both National News programming (92 hours) and nations news (33 hours) than the UK average of 86 hours and 28 hours respectively.
 - Viewing of nations/regions News in Wales (29 hours) was the lowest of the devolved nations, but more than the UK average (28 hours). The average individual watched 87 hours of National News programming.
 - Viewers in Northern Ireland spent the least time watching National News (81 hours), however these viewers spent the most time watching nations/regions news (37 hours) than across the other devolved nations and the UK average. (See Figure 52).
- English regions:
 - Viewing to National News was highest in the South West (99 hours) and Meridian (98 hours) and lowest in the West of England (78 hours) and London (80 hours).
 - Nations/regions news viewing was highest in the Border region (41 hours) and lowest in London (19 hours). (See Figure 53).

-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of March/April 2012.

Summary: Nations/regions News (2)



- Between 2006 and 2011, the total time spent watching nations/regions news across the year per individual, remained fairly stable – although at the channel level, viewing to BBC One increased as viewing to ITV1 decreased. (See Figure 54).
- Looking at the share of viewing of Channel 3 and BBC One evening nations/regions news programmes in 2011 compared to 2006 shows that across the whole of the UK, the average share of the main weekday evening nations/regions news fell by 2 points on Channel 3 and remained stable on BBC One (see Figures 55).
- In the devolved nations, Channel 3's share fell in Northern Ireland (down 3 points), but increased in Wales (up 2 points) and Scotland (up 2 points). BBC One's share fell in Northern Ireland (down 1 point) and Wales (down 7 points) while increasing in Scotland (up 1 point). (See Figure 55).
- In the English regions in 2011:
 - Channel 3's shares fell in five out of the ten regions including the East (down 7 points), Meridian (down 6 points) and Midlands (down 5 points). It's share rose in four regions including Border (up 13 points) and the North East (up 5 points).
 - BBC One's share for the weekday evening regional news increased across six of the ten regions and remained stable in two regions. Small falls were seen in the East and North West (down 1 point each). The most notable increases were seen in the South West, Border and the West (up 9 points each). (See Figure 56).

-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of March/April 2012.

Fig 52 Total hours of viewing of National News and BBC/Channel 3 nations News by nation, 2011

Total hours per year watched by average person



Source: BARB, All Individuals. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

-Based on total minutes of viewing of 'News: National/International' and 'News: Regional News'. See *Definitions: PSB genres analysis*.

Fig 53 Total hours of viewing of National News and BBC/Channel 3 regions News by English region, 2011

Total hours per year watched by average person

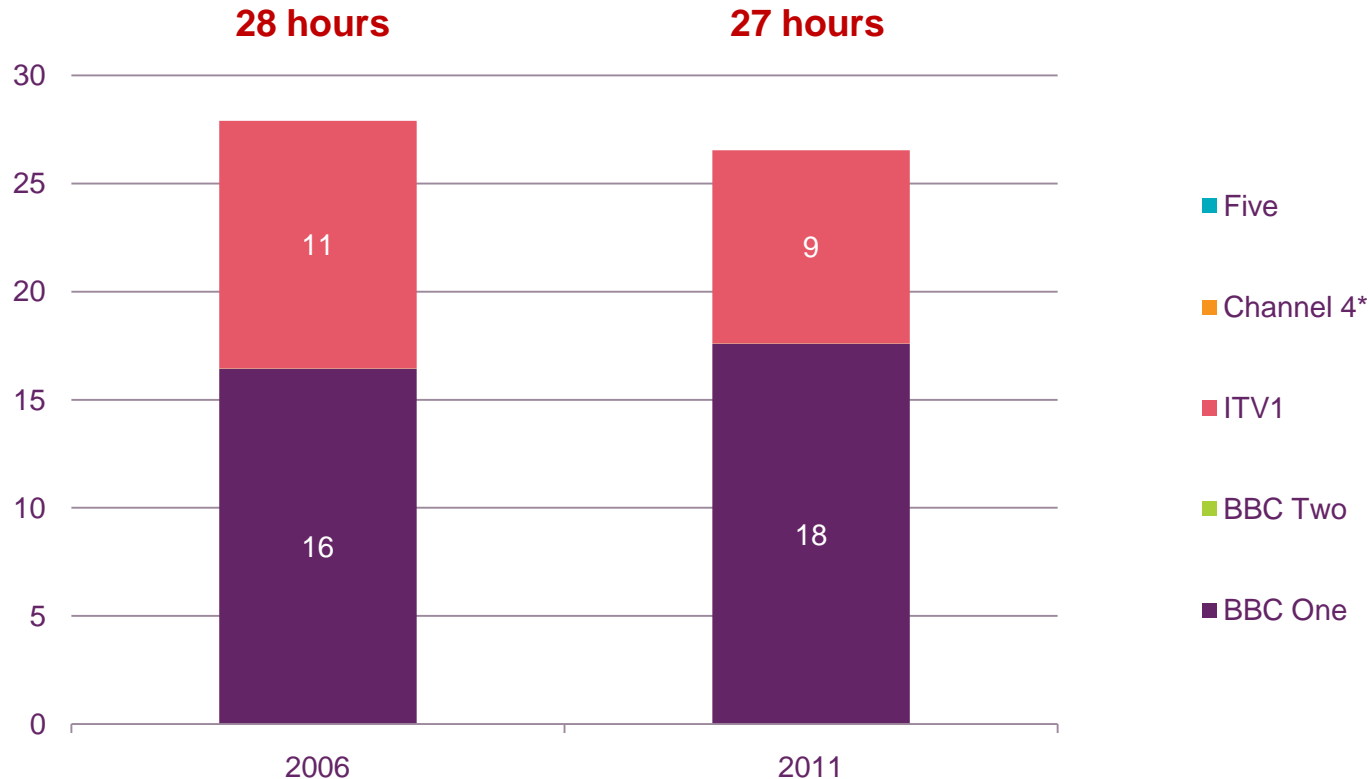


Source: BARB, All Individuals. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five)

-Based on total minutes of viewing of 'News: National/International' and 'News: Regional News'. See *Definitions: PSB genres analysis*.

Fig 54 Total viewing of Nations/regions News – Main five PSB channels only, 2006 vs. 2011

Total hours per year watched by average individual (4+)



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

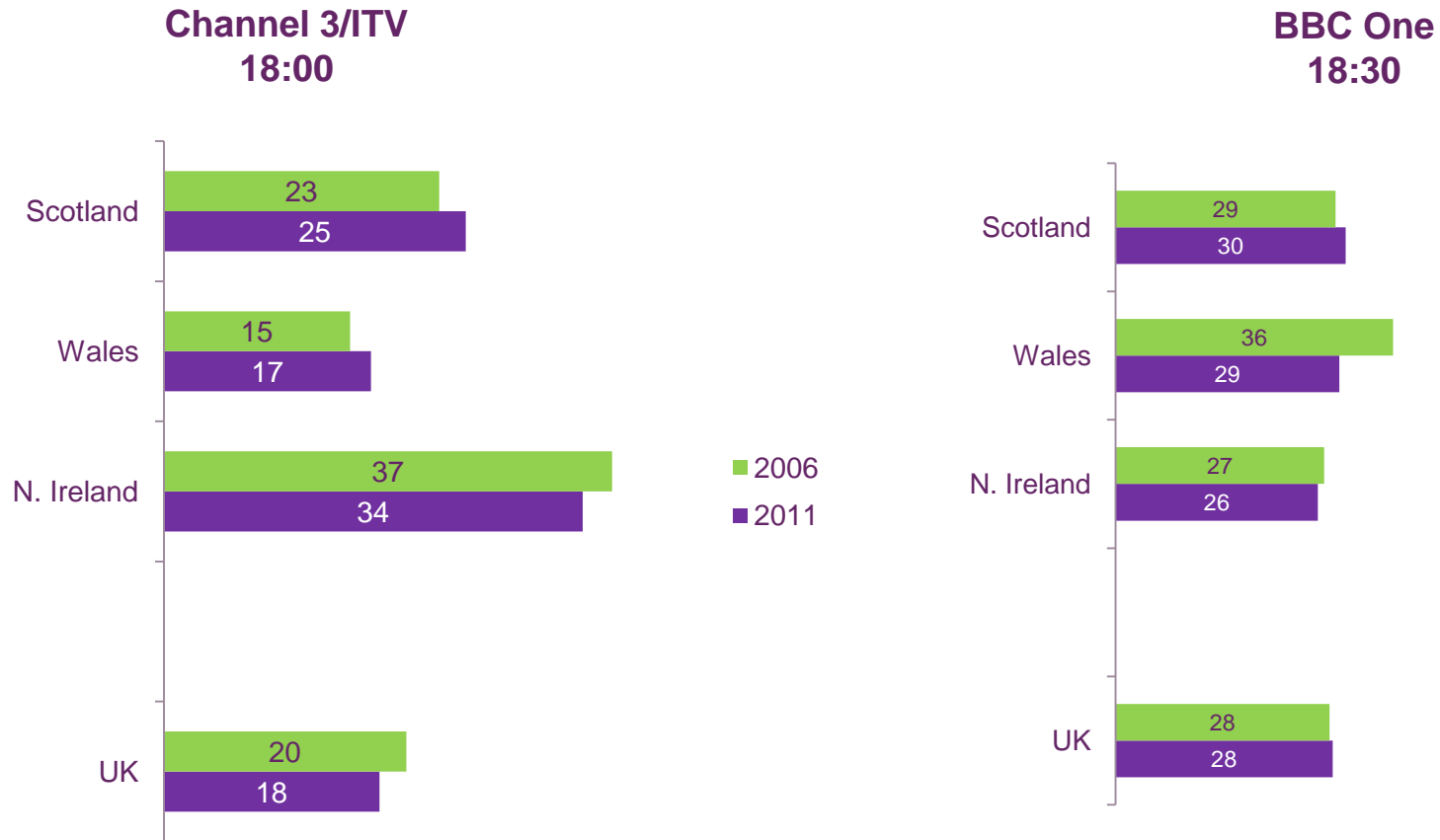
-Based on total minutes of viewing of 'News: Regional'. See *Definitions: PSB genres analysis*.

-* C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2011 data

-New BARB panel introduced 1st Jan 2010. This included a re-defining of geographic boundaries. As a result pre and post panel change data must be treated with caution.



Fig 55 Channel 3 and BBC nations evening news viewing share, 2006 and 2011



Source: BARB, All Individuals.

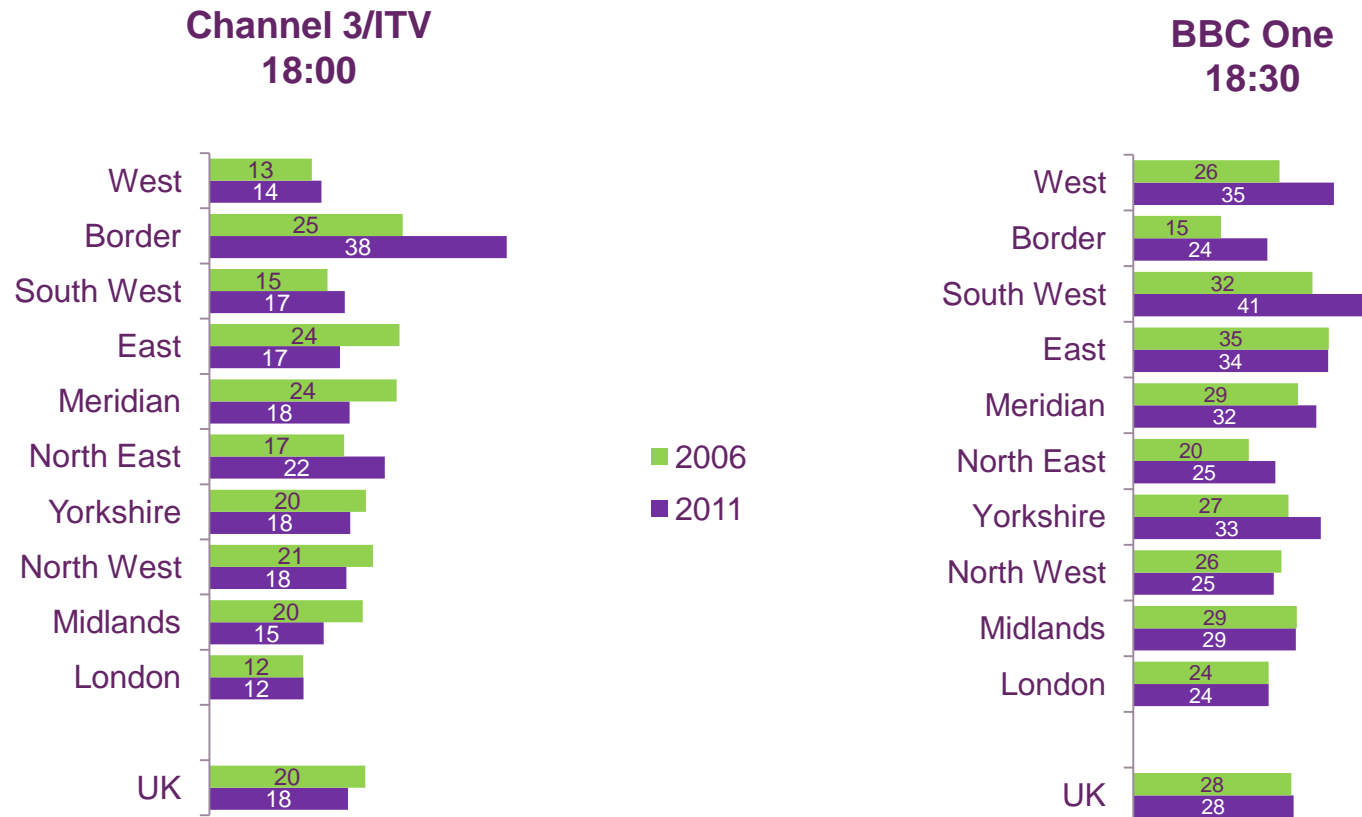
-Based on average channel shares of 'News: Regional News' genre programming start time 17:50-18:40 Monday-Friday. UK figure based on dayparts ITV1 Mon-Fri 1800-1830, BBC Mon-Fri 1830-1900

-ITV regions used for analysis, therefore BBC One share may not exactly correlate with distinct BBC regional news programmes

-As part of the panel change (2010), there was a re-defining of geographic boundaries which may have had a contributing effect to any viewing data changes 2006 vs. 2011. Pre and post panel data should be viewed with caution.



Fig 56 ITV1 and BBC regional evening news viewing share, 2006 and 2011



Source: BARB, All Individuals.

-Based on average channel shares of 'News: Regional News' genre programming start time 17:50-18:40 Monday-Friday. UK figure based on dayparts ITV1 Mon-Fri 1800-1830, BBC Mon-Fri 1830-1900

-ITV regions used for analysis, therefore BBC One share may not exactly correlate with distinct BBC regional news programmes

-As part of the panel change (2010), there was a re-defining of geographic boundaries which may have had a contributing effect to any viewing data changes 2006 vs. 2011. Pre and post panel data should be viewed with caution.

Regional News analysis: Summary (1)

- BBC1's early evening regional news (EERN) has outperformed its early even national news (EENN) since at least 2005. The BBC1's EERN programme attracts the highest share of all the early evening news programmes on both BBC1 and ITV1. Looking at ITV1 the picture is very different, here the EENN programme outperformed its regional offering until mid 2008 then the gap between the two programmes closed as they both continued to decline in audience share, the EENN to a greater extent than the EERN programme.
- The reasons why one programme performs better than another are varied, however looking in detail at the programme slots which precede the programmes, can shed some light. At a glance the data suggests BBC1's EERN benefits from strong channel performance in the preceding half-hour when the BBC EENN is transmitted. The same can't be said of ITV1's EERN (1800-1829) as the preceding slot attracts just over half the audience share of the preceding slot to the BBC EERN programme.
- While BBC1's share between 18:30-18:59 has remained fairly stable over the past 7 years, ITV1's share during that slot as been in decline. The same is true with ITV1's EERN slot (1800-1829) although the decline is less.
- The profile of BBC1's audience changes slightly from 1700-1830 as older viewers tune in for the lead up to the BBC EENN and younger viewers switch over to Channel 4 and Five. ITV1's profile remains much more consistent across the same dayparts
- Substantial inheritance effect can be deduced from BBC's EENN programme to their EERN programme.
 - Inheritance analysis suggests 80% of viewers to the BBC EENN stay with BBC1 to watch the BBC EERN, this figures rises to 84% amongst adults aged 55+ and falls to 61% of younger adults aged 25-34.
 - The data suggests that younger viewers come back to BBC1 for the EERN as the profile of the slot becomes younger compared to the preceding slot.
 - Due to the fact that the viewing universe increases during the peak-time slot and viewers switch from other channels to BBC1, this inherited audience represents around 60% of all viewers reached by the BBC EERN.

A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore comparisons should be viewed with caution.

Regional News analysis: Summary (2)



- In the case of ITV1 the EERN programme benefits much less from inheritance than the BBC EERN, as just under half of viewers to The Chase (the programme which preceded the ITV EERN programme in the sample week that was chosen) (49%) go on to watch the ITV EERN.
- To try to understand which regions are driving the BBC EERN performance and to explore whether the BBC EERN is outperforming the BBC EENN in every region, the analysis looked in detail at the BBC EENN and the BBC EERN by region over time. What was evident was that the EERN outperformed the EENN in every region, across the last two years. Across 2009 in the South West, Border and West the EENN did slightly outperform the EERN programme. The only region to see a decline in audiences to its EERN programme since 2009 was Wales.
- In contrast the ITV1 EERN programme is outperformed by the EENN programme in all the English regions excluding Border in 2010 and 2011 and the North East in 2011 and the nations Scotland and NI where the EERN outperforms the EENN.
- While many regions have seen a drop in the share of viewing to the ITV1 EERN programme since the merger of regions for the purposes of reporting regional news in 2009, some regions have actually seen an INCREASE in share to their ITV1 EERN programme. The region where this increase has been the greatest is Border.
- The merger of the Border/Tyne Tees region in Feb 2009 was one of the most talked about, however it appears from the data that the merger hasn't negatively affected the regional news audience for either of those regions. In fact the audiences have increased. Instead of a half-hour standalone programme, Lookaround and North East Tonight now contain at least 15 minutes of dedicated local news at the start of the programme, followed by shared output from both regions for the remaining 15 minutes.
- In order to try to understand what has driven this increase in audiences in the Border region and to explore where they are coming from and when they are tuning into the ITV1 EERN programme we analysed the flow of audiences. Looking at 5 minute slots from 1700 up until 1830 one can see that the greatest activity in terms of audience movement is between 1755-1800, just before the start of the ITV1 EERN, where ITV1 gains 29,000 viewers.

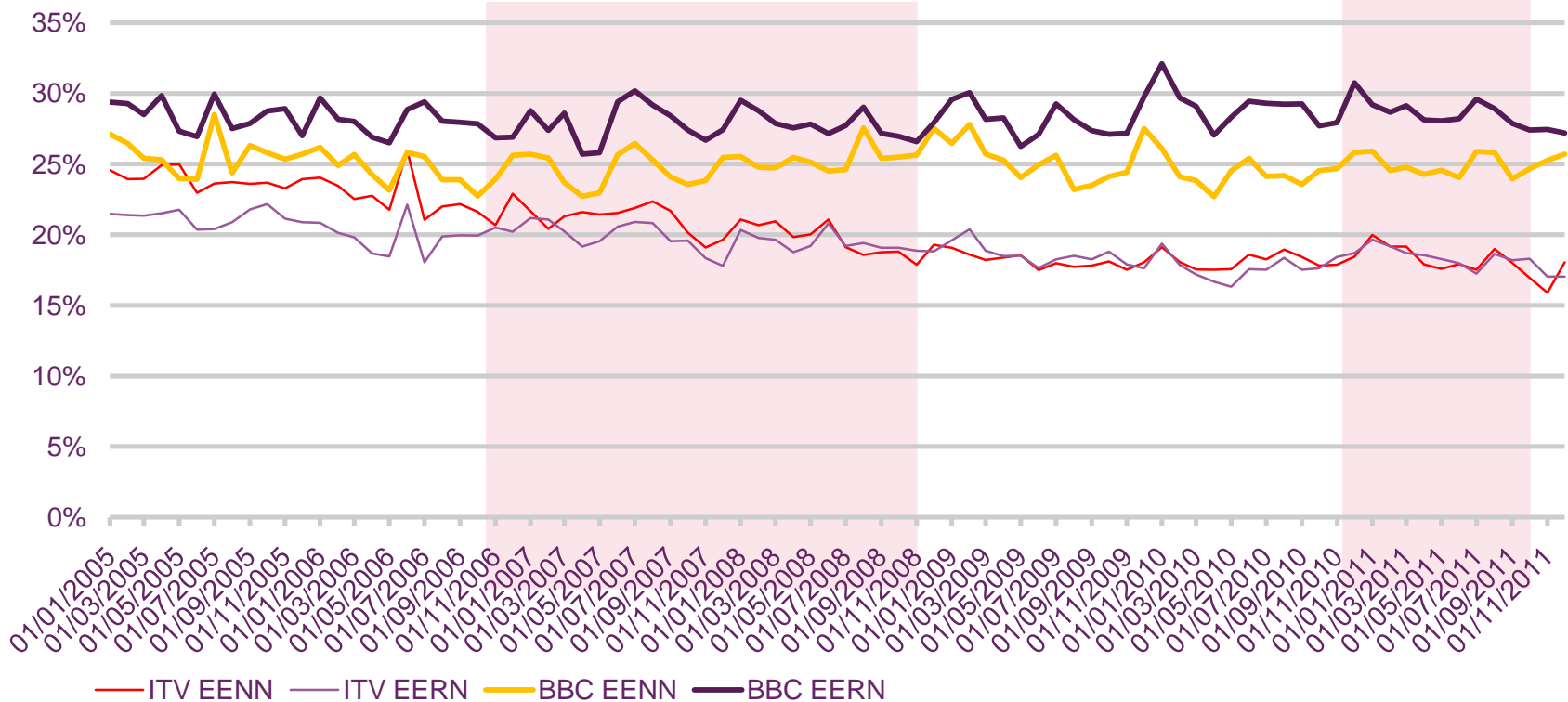
Regional News analysis: Summary (3)



- Of this net gain almost half (48%) switch ON their televisions specifically to watch the ITV1 EERN programme. 7,000 come from CH4 and 2,000 from BBC2. 3,000 viewers are lost to BBC1 within this 5 minute slot. The channel continues to gain audiences for the next 10 minutes until 1810-1815 when audiences can also be seen leaving the channel. We know that it is the first 15 minutes of the ITV1 EERN programme that contains **dedicated** local news and the shared output makes up the last 15 minutes of the programme and it appears that the audiences are coming to the programme for the first half and then gradually start moving as the programme progresses .
- Doing this same analysis based on the first Monday in March (as snap shot day in 2008) paints a very different picture. In 2008 the same slot to ITV1 gained a total of 18,000 viewers only (11,000 viewers less than the same time in 2012). 11,000 came from other multichannel channels and 7,000 switched ON to ITV1 specifically. Whilst these analyses are only illustrative, it does suggest that ITV1 EERN slot in Border is gaining more viewers in recent years and a larger proportion are turning on specifically to watch it, particularly the first 10-15 minutes.
- Looking at the inheritance effect of the preceding programme to ITV1's EERN in the BORDER region, we can see that more recently almost two thirds (64%) of viewers to the preceding programme (The Chase, in the sample week in 2012) went on to watch the EERN programme. The same period in 2008 saw a 50% inheritance (the preceding programme in 2008 was Golden Balls). While only illustrative these analyses do appear to show that more recently the ITV1 EERN in Border has benefited from greater inheritance, along with a greater number of viewers turning over or ON specifically to watch the programme, both of which contribute to an increased audience to the programme overall.



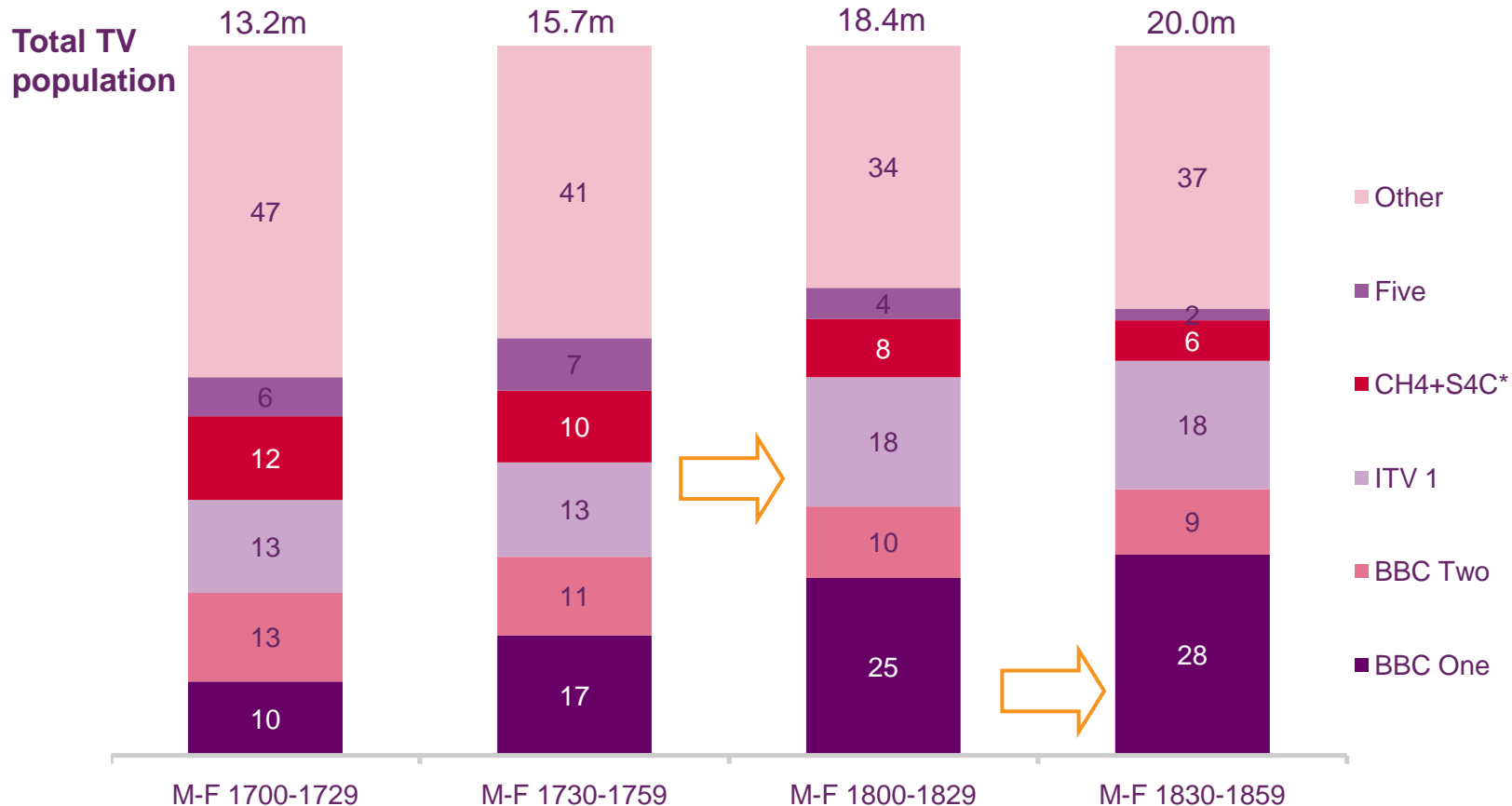
Figure 57: Share of viewing to BBC early evening regional news continues to attract highest audience share



Source: BARB

Figure 58: BBC1's early evening regional news benefits from strong performance in preceding half-hour slot

Channel Share by Daypart, Weekdays

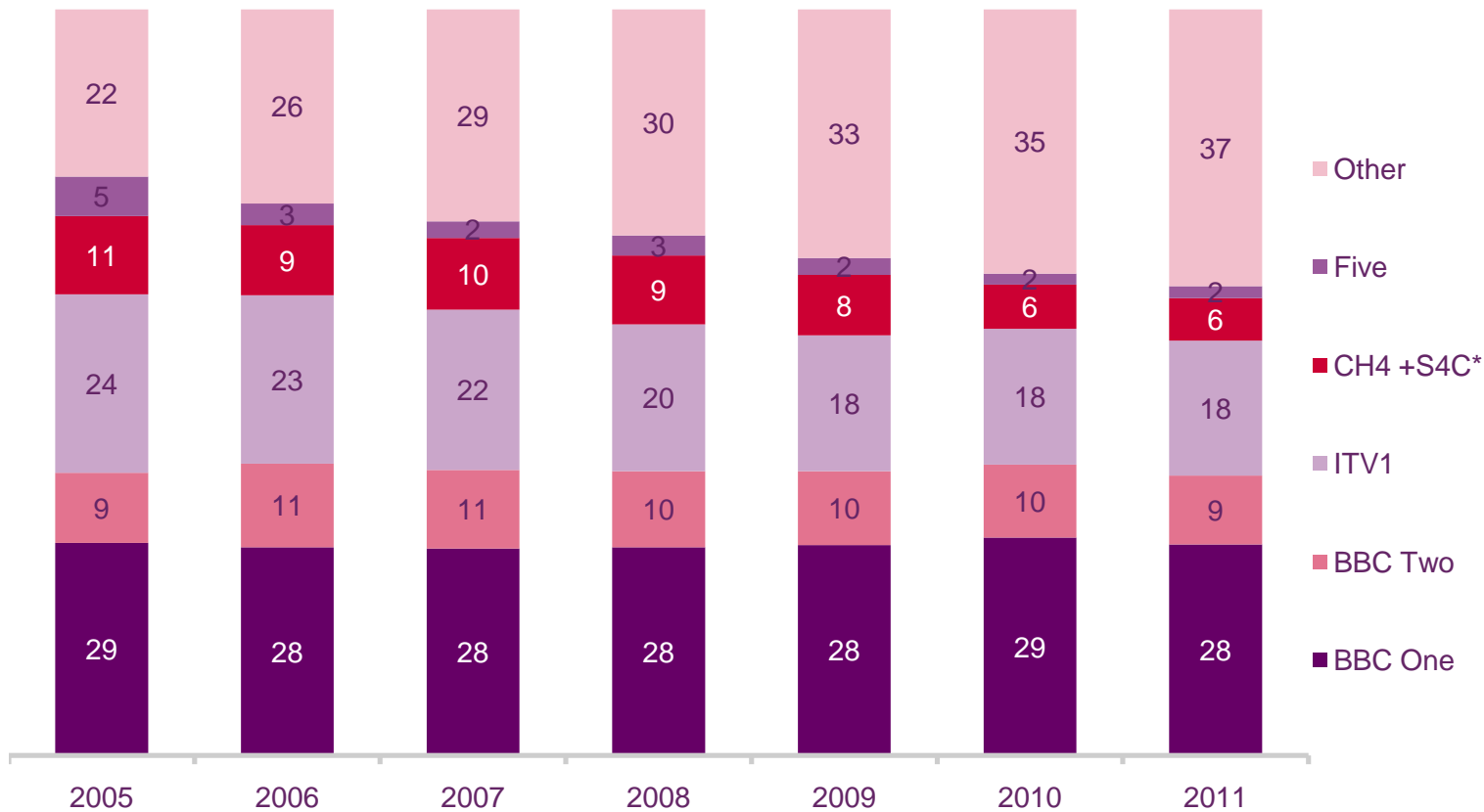


Source: BARB, 2011

Please note this chart combines post 2010 figures for Ch4 and S4C

Figure 59: BBC1's regional news share has remained fairly stable

Channel Share: Weekdays, 1830-1859

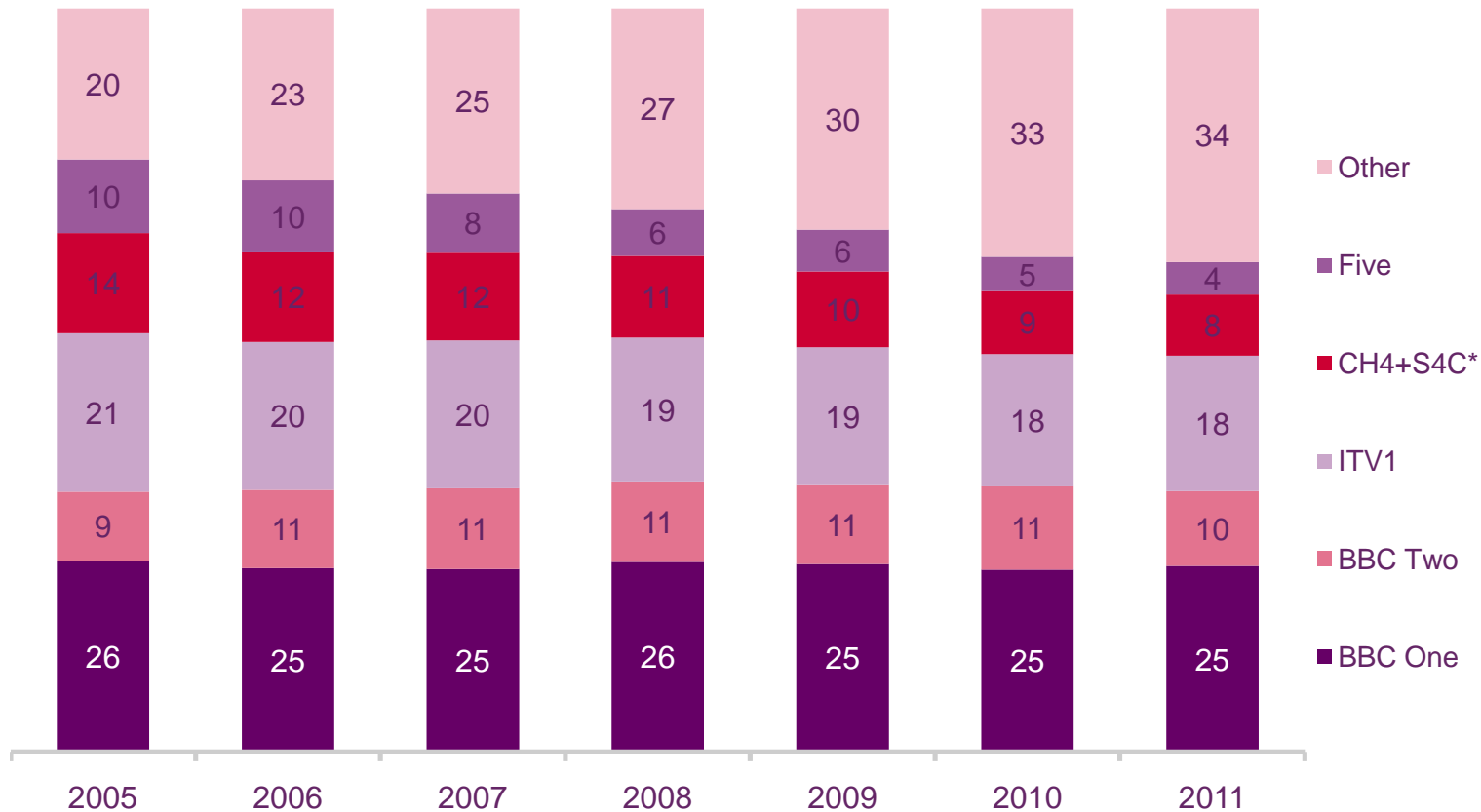


Source: BARB, 2011

* Please note this chart combines post 2010 figures for Ch4 and S4C.

Figure 60: BBC1 has also maintained audience share in their early evening national news slot

Channel Share: Weekdays, 1800-1829



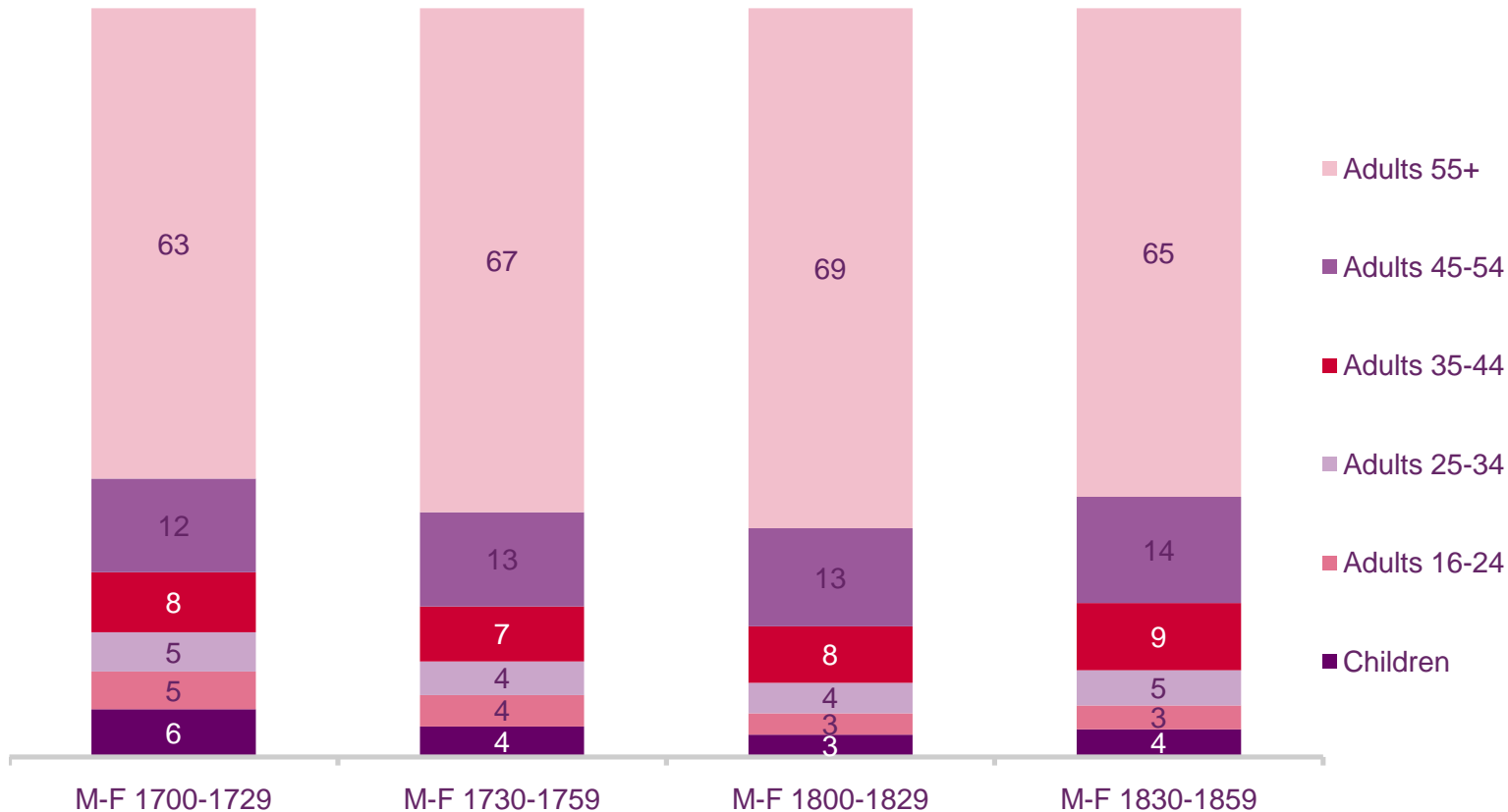
Source: BARB, 2011

Please note this chart combines post 2010 figures for Ch4 and S4C



Figure 61: The profile of BBC1's audience changes slightly between the dayparts

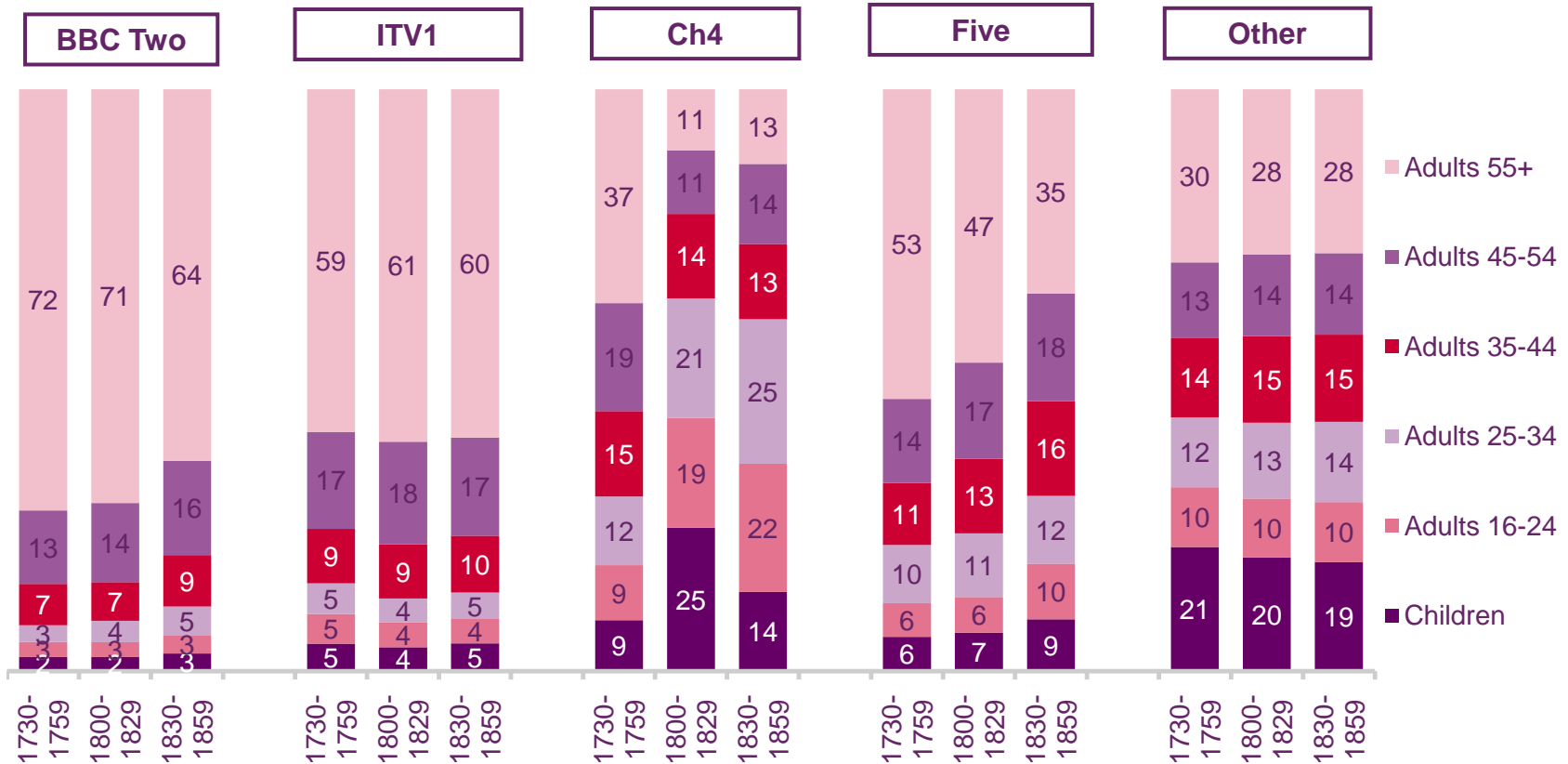
Channel Profile: BBC One, Weekdays



Source: BARB, 2011

Figure 62: Audience profile, channels except for BBC1, change across dayparts

Channel Profile: Weekdays

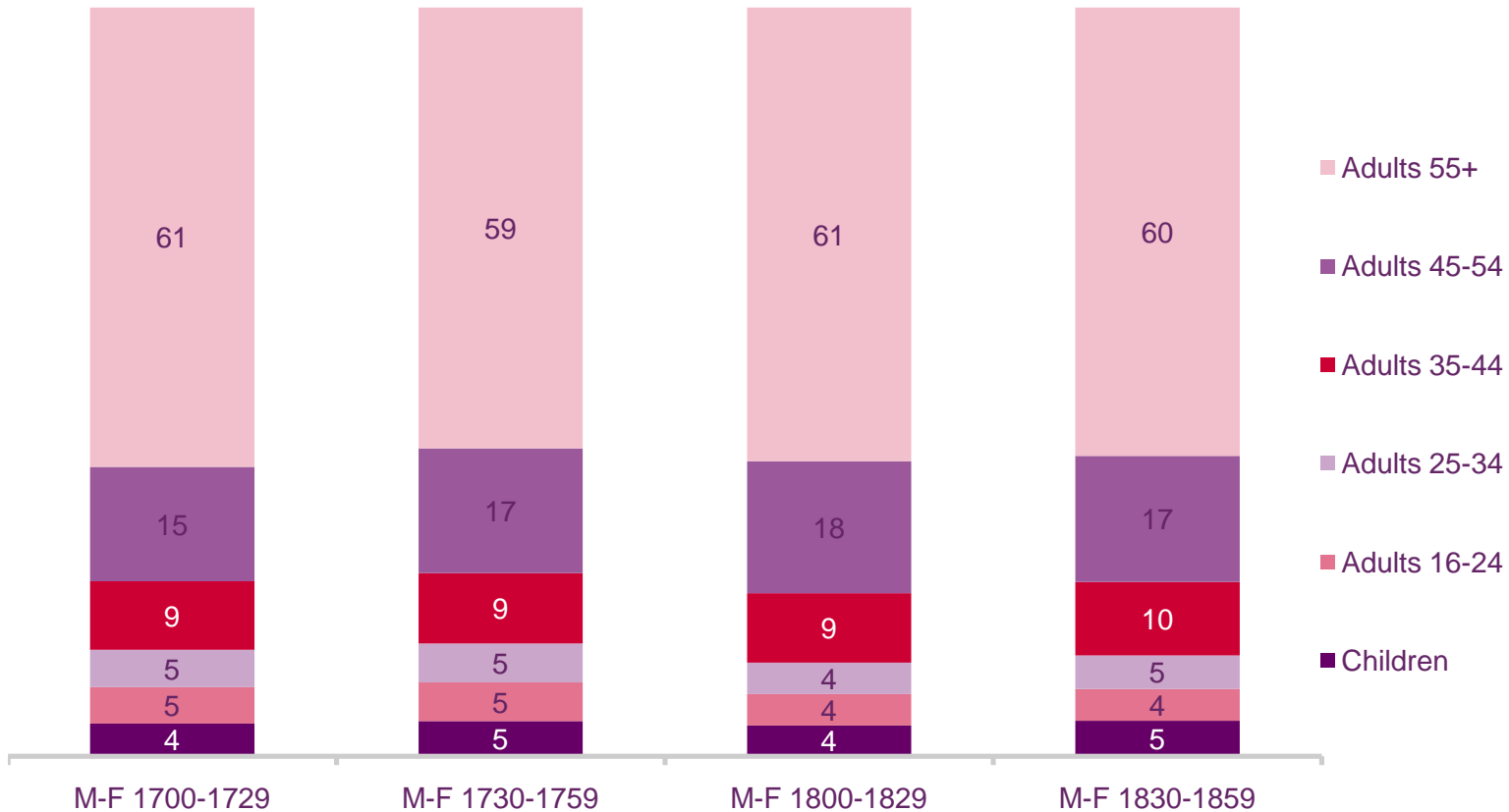


Source: BARB, 2011



Figure 63: The profile of ITV1's audience remains much more consistent between the dayparts

Channel Profile: ITV1, Weekdays

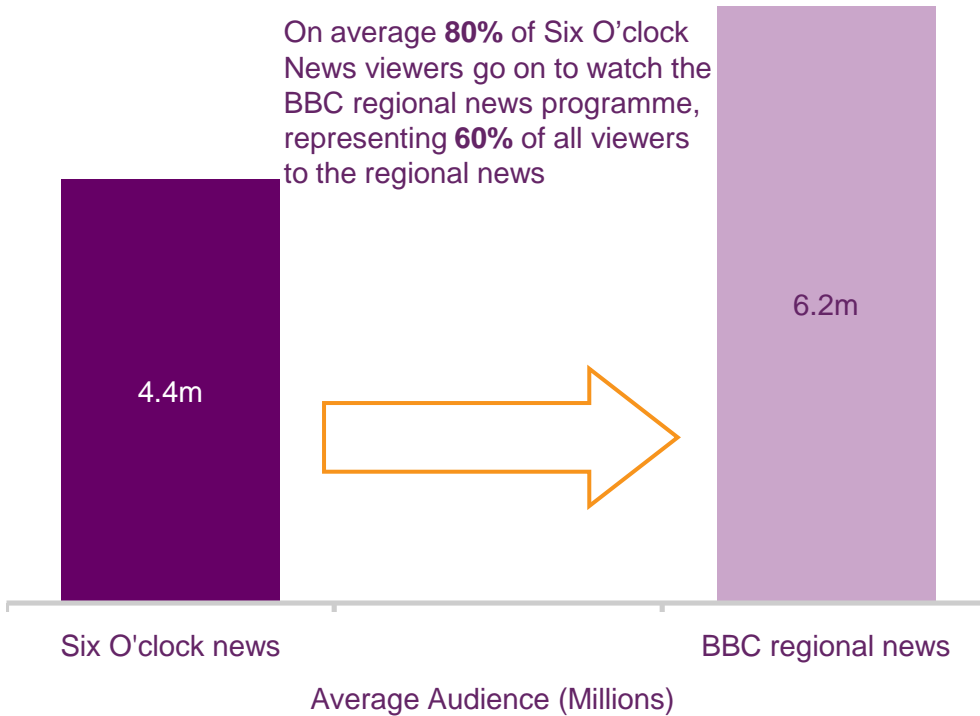


Source: BARB, 2011

Figure 64: 80% of all Six O'clock News viewers go on to watch the BBC regional news programme

Programme Inheritance (sample week)

On average **80%** of Six O'clock News viewers go on to watch the BBC regional news programme, representing **60%** of all viewers to the regional news

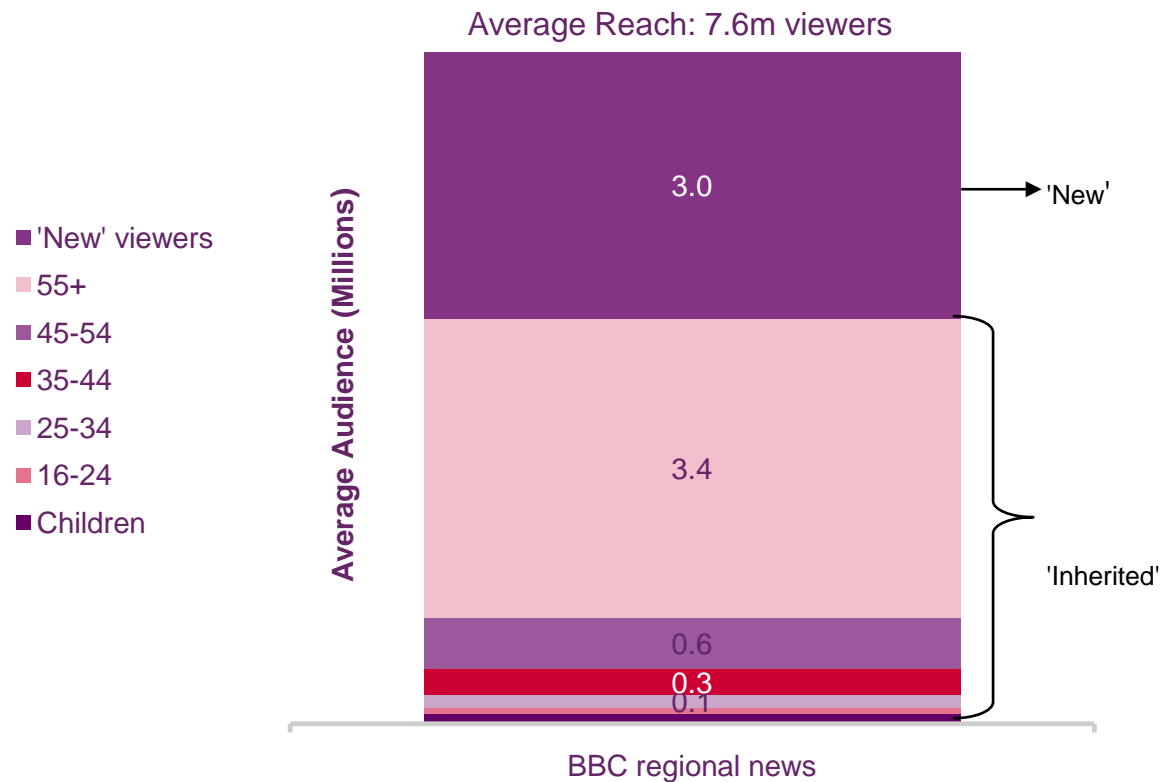


| | % Six O'clock News viewers going on to watch BBC regional news |
|-----------------|--|
| All Individuals | 80% |
| Children | 67% |
| 16-24 | 64% |
| 25-34 | 61% |
| 35-44 | 72% |
| 45-54 | 72% |
| 55+ | 84% |

Source: BARB, 05/03/12-09/03/12 This analysis is based on a sample week only and therefore is illustrative rather than definitive

Figure 65: Audience Breakdown of BBC regional news

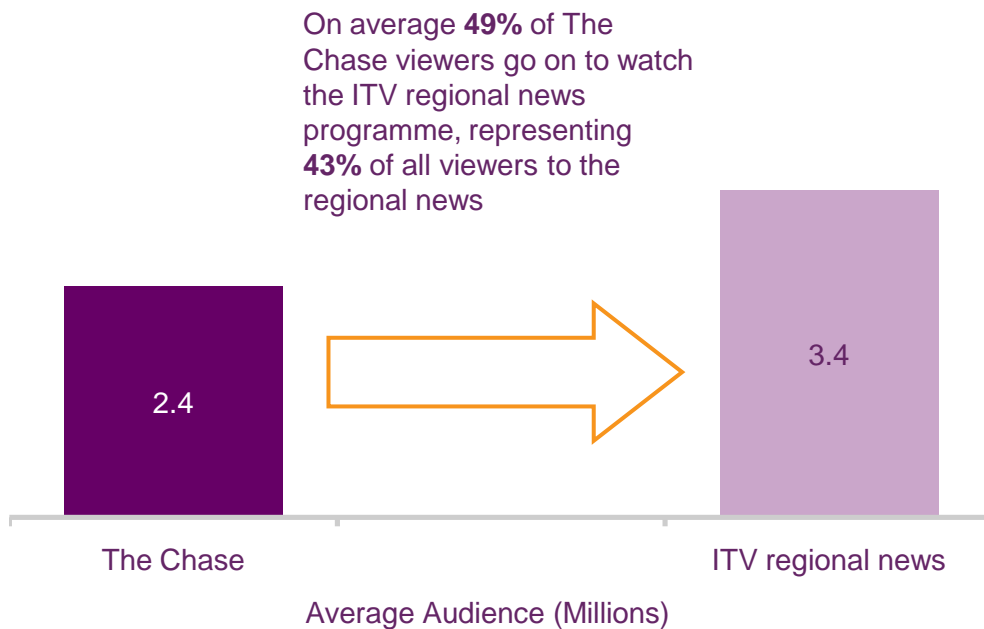
Audience Breakdown: Inherited vs. 'New'



Source: BARB, 05/03/12-09/03/12 (Reach based on 3 mins consecutive viewing)

Figure 66: Almost half of all The Chase viewers go on to watch the ITV regional news programme

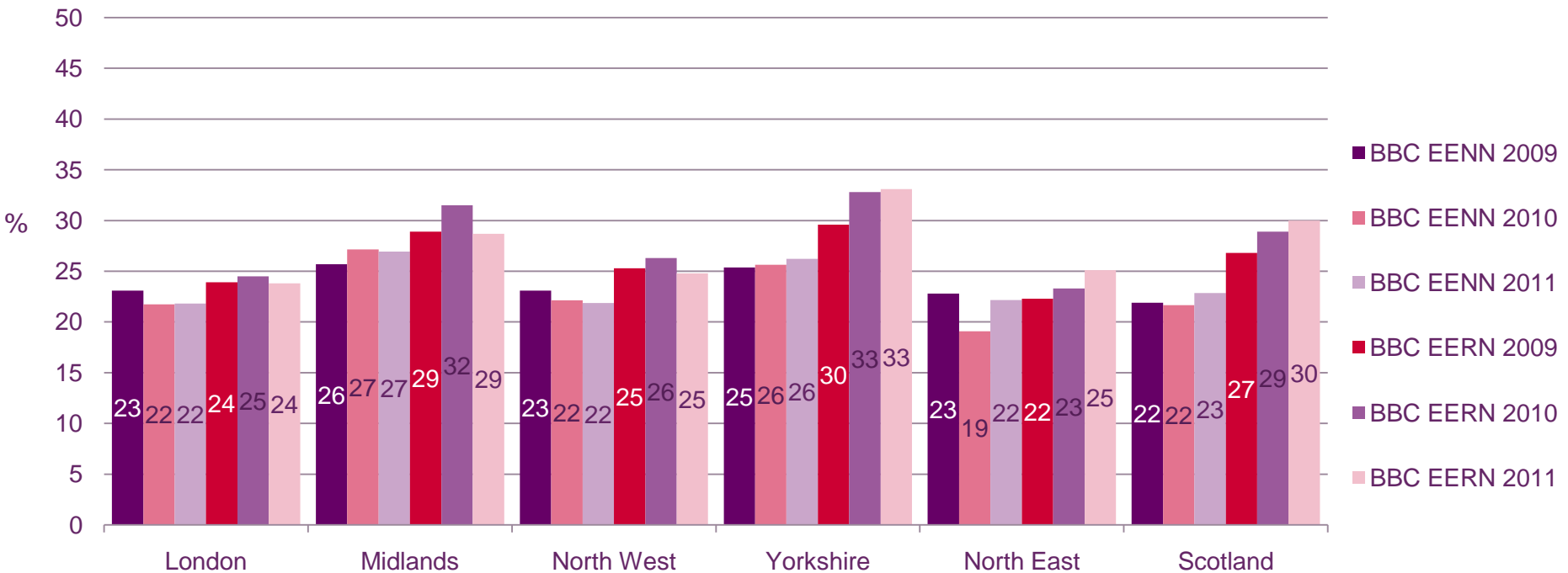
Programme Inheritance (sample week)



Source: BARB, 05/03/12-09/03/12 This analysis is based on a sample week only and therefore is illustrative rather than definitive



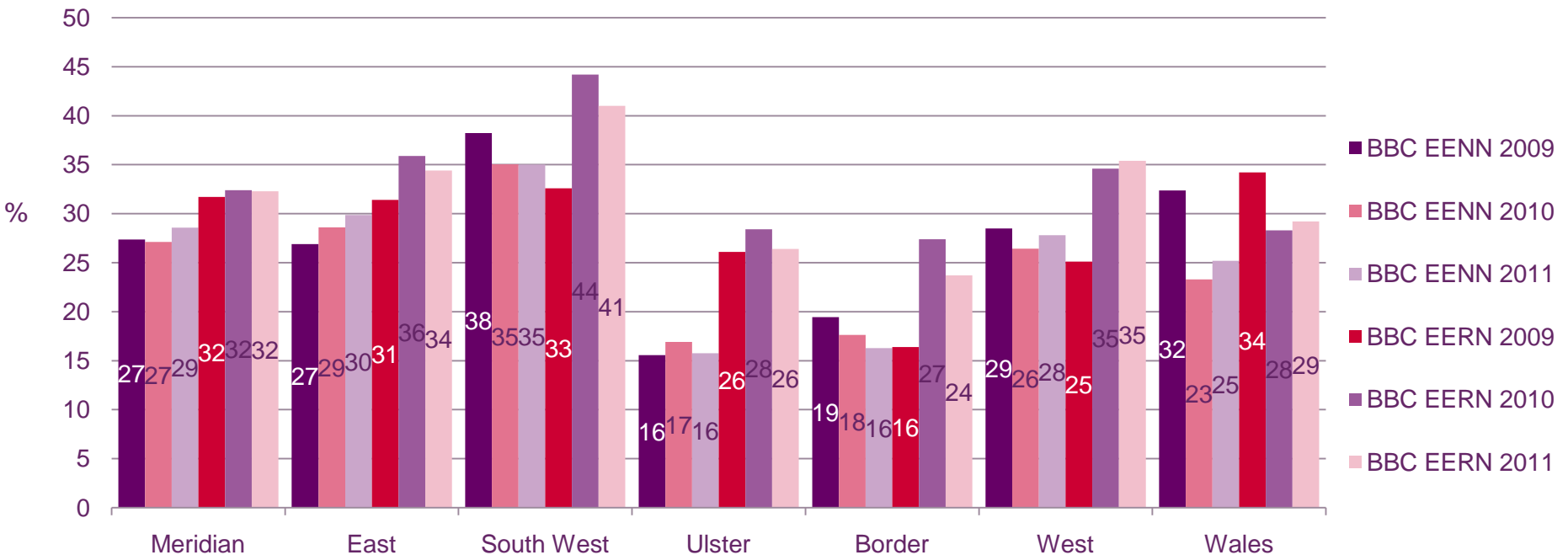
Figure 67: Audience share of BBC regional news vs. national news by region from 2009 to 2011 (1)



Source: BARB, EERN figures based on regional news genre programming, based on ITV regions. EENN based on daypart slot data



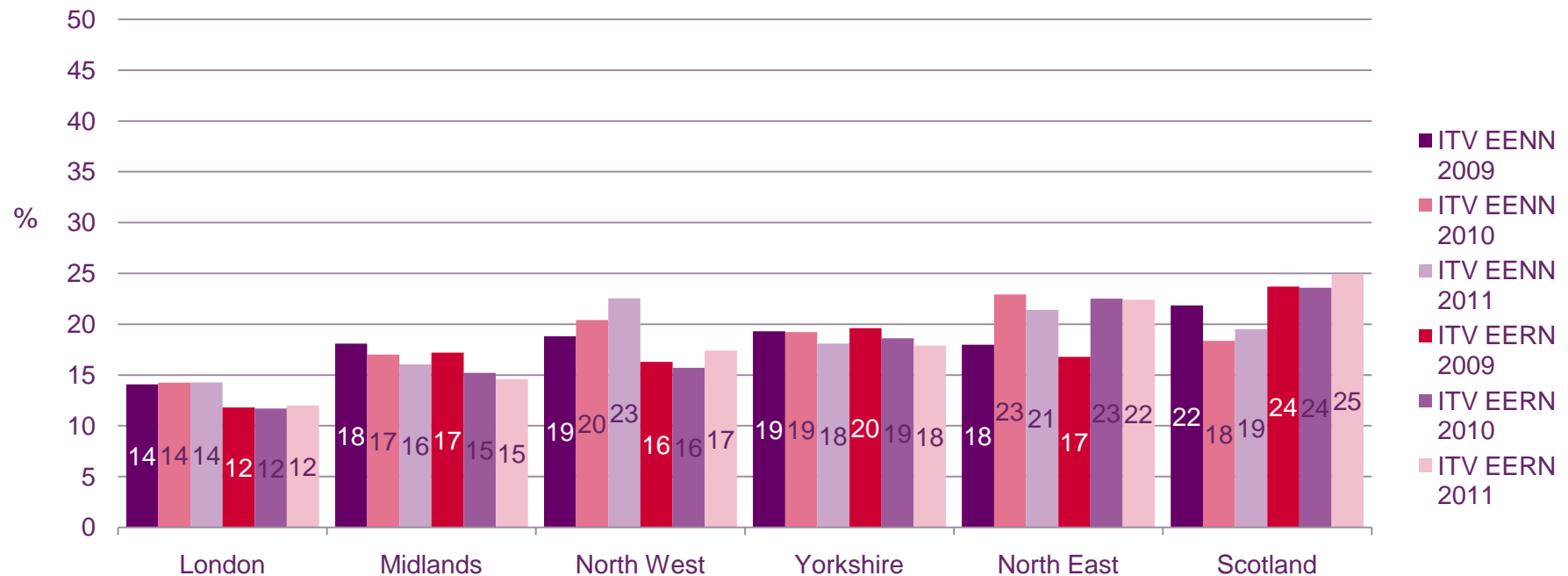
Figure 68: Audience share of BBC regional news vs. national news by region from 2009 to 2011 (2)



Source: BARB, EERN figures based on regional news genre programming, based on ITV regions. EENN based on daypart slot data



Figure 69: Audience share of ITV regional news vs. national news by region from 2009 to 2011 (1)



Source: BARB, EERN figures based on regional news genre programming, based on ITV regions. EENN based on daypart slot data



Figure 70: Audience share of ITV regional news vs. national news by region from 2009 to 2011 (2)



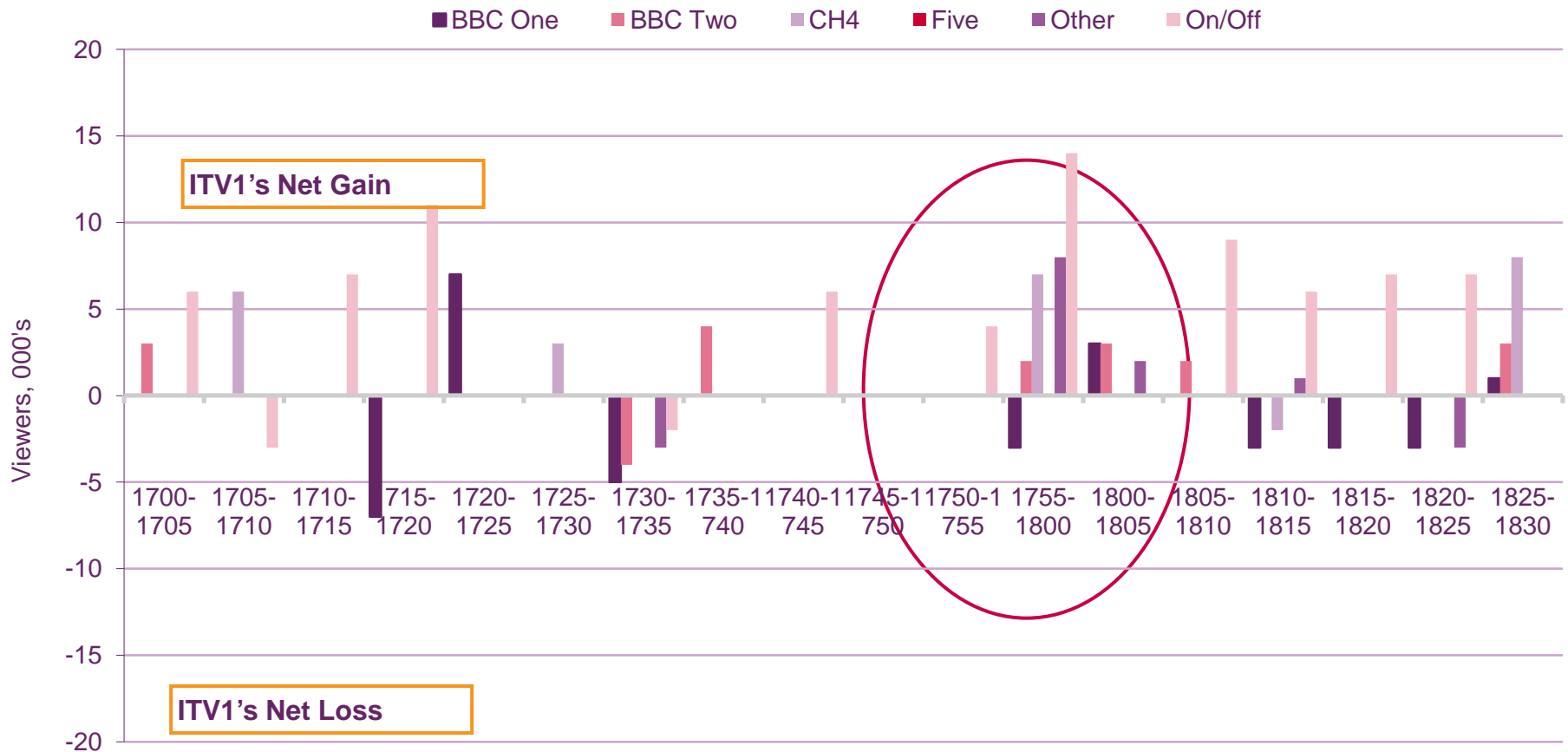
Source: BARB, EERN figures based on regional news genre programming, based on ITV regions. EENN based on daypart slot data

Regional News Analysis – sample day illustrative only



Figure 71: The greatest amount of audience flow activity between 17:55-18:00...

ITV1's Net Loss/Gain by Channel



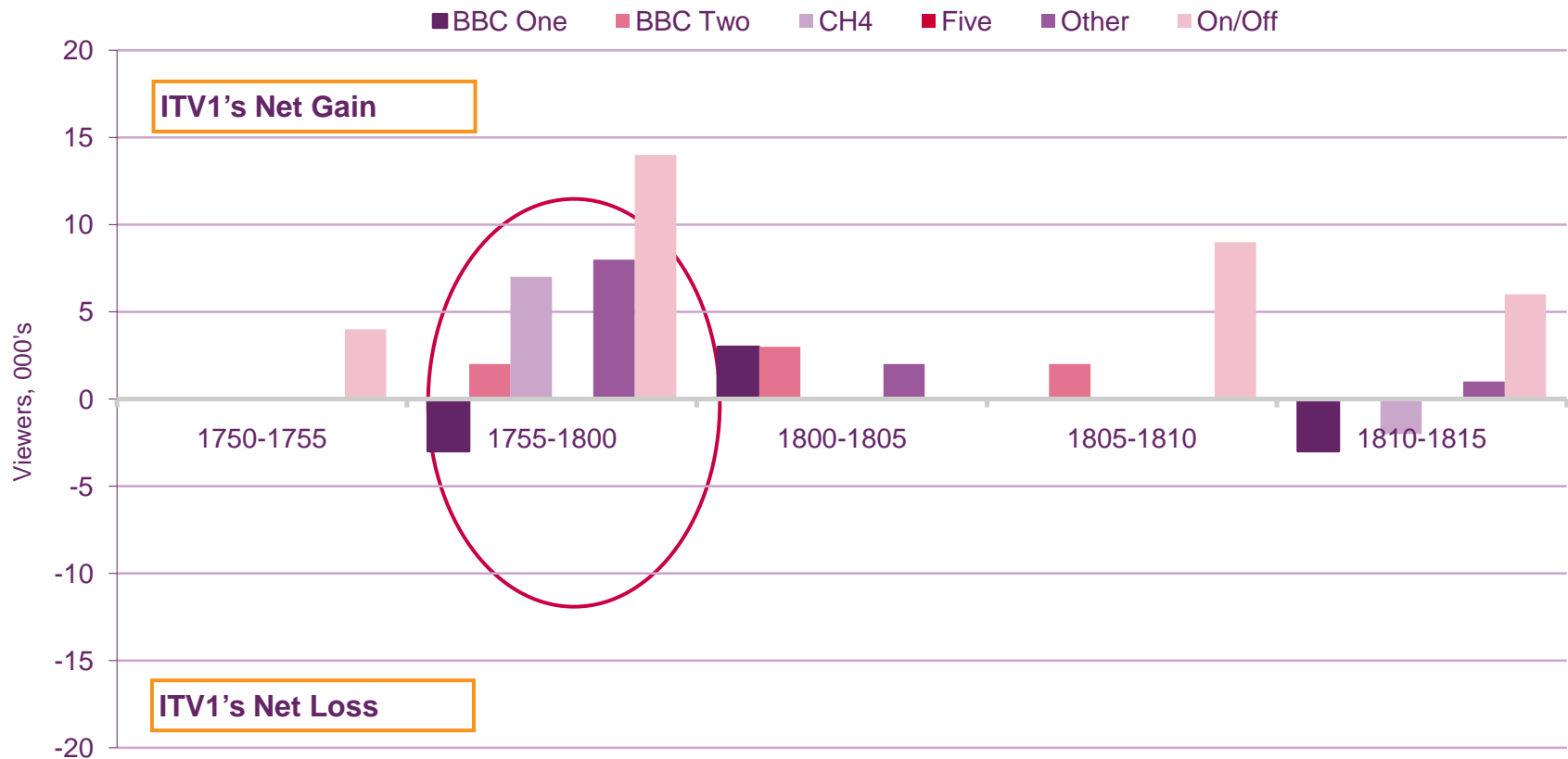
Source: BARB, 05/03/2012, Border region, this analysis is based on a single day and therefore is illustrative rather than definitive

Regional News Analysis – sample day illustrative only

Figure 72: Where the channel gains 29,000 viewers



ITV1's Net Loss/Gain by Channel



Source: BARB, 05/03/2012, Border region, this analysis is based on a single day and therefore is illustrative rather than definitive

Regional News Analysis – sample period illustrative only



Figure 73: Programme Inheritance (sample weeks)

| | 05/03/12-09/03/12 | 03/03/08- 07/03/08 |
|--|--|--|
| % of viewers going on to watch Border regional news Lookaround | 64% (The Chase- average 3 min consecutive reach 61,000) | 50% (Golden balls – average 3 min consecutive reach 54,000) |
| Average reach to Lookaround (3mins consecutive) | 109,000 | 79,000 |
| New viewers | 71,000 | 52,000 |
| inherited | 38,000 | 27,000 |

Source: BARB, 05/03/12-09/03/12 and 03/03/08-07/03/08 , this analysis is based on two days and is therefore illustrative rather than definitive

Summary: S4C

- In 2010 a new BARB panel was introduced. Data pre and post 2010 are based on different viewer panels. Refined geographic boundaries were also introduced for Wales. Comparisons pre and post 2010 should be viewed with caution.
- Changes to the BARB reporting system in 2010 now also allow broadcasters to retrospectively amend the genre labelling of broadcasts they have aired. These changes will apply to all historic data for respective programmes/films. As a result of this analysis within this report is subject to change over time. All data within this report true as of April/May/June 2011.

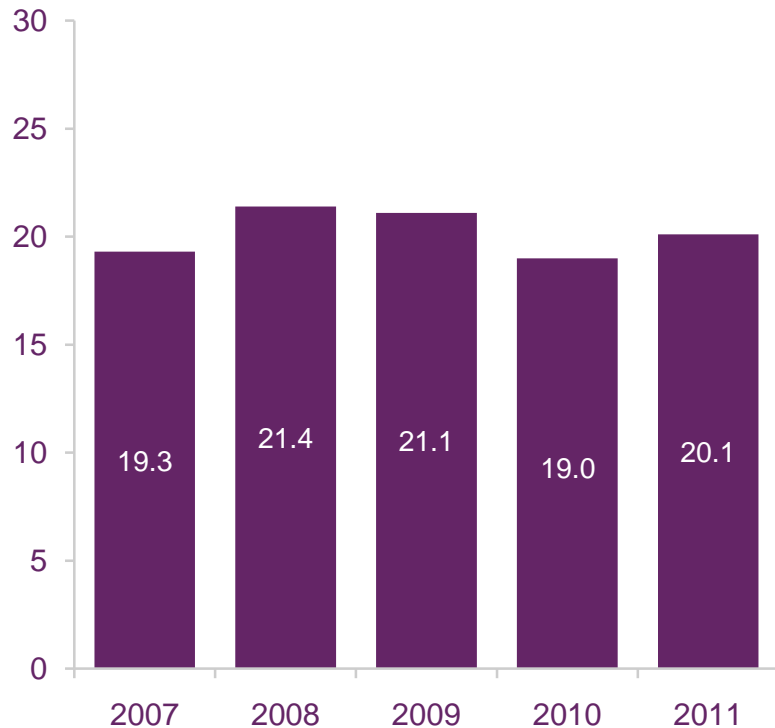
The Welsh Authority has the statutory responsibility to provide the S4C service for viewers in Wales. S4C is a wholly Welsh language channel broadcasting 120 hours of programmes each week, across a range of platforms, including online. This report focuses on 2011.

Television viewing data are taken from the BARB measurement system, which examines S4C Welsh output as a whole, in order to provide an overall picture of the amount of Welsh programming viewed. Analysis was carried out based on all individuals in Wales. Data reported here were supplied by S4C, rather than produced by Ofcom.

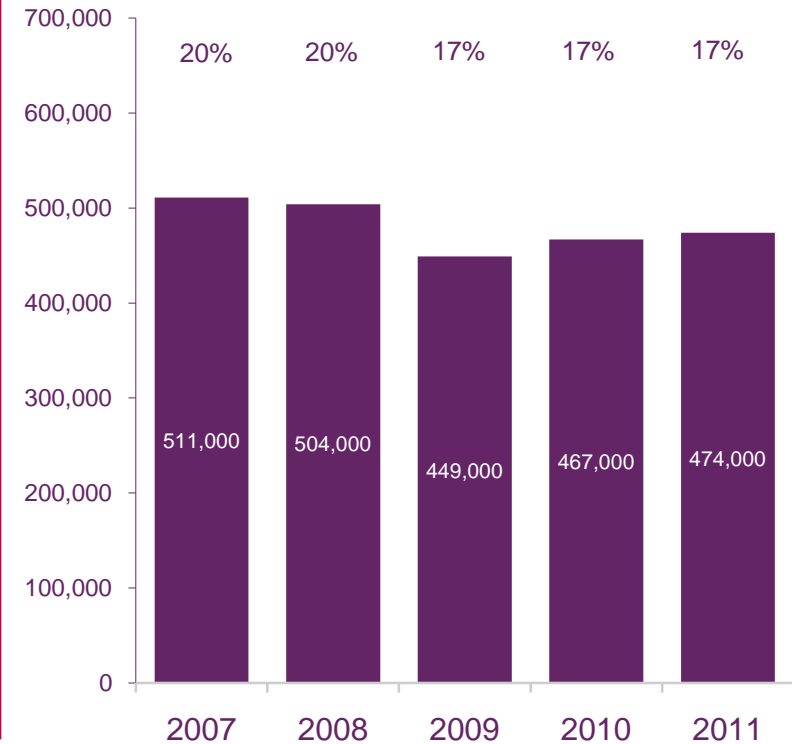
- In 2011, S4C Welsh language programmes were watched for an average of 20 hours per year by all individuals in the S4C region; this is an increase on the average hours watched the previous year in 2010 (19.0 hours), but is lower than the average hours watched in 2009 (21.1 hours) (See Figure 74).
- The weekly reach of Welsh language programming on S4C was 17% in 2011, equalling the previous couple of years, but the weekly reach based on thousands saw an increase year on year with 474,000 individuals tuning into the channel (See Figure 74).
- In 2011, S4C's share of all viewing remained at 1.3% and its share of peak-time viewing increased to 2.0% (Figure 75).
- Looking at the proportions of viewing of different genres on S4C in 2011 shows that Sport (22%), Drama (including Soaps, series and single dramas) (20%), and Current Affairs (14%) were the most-watched genres (See Figure 76).

Fig 74 Viewing of Welsh language output on S4C, 2007 - 2011

Hours viewed of Welsh language programming
Average hours a year



Weekly reach of Welsh language programming
3-min weekly reach (000s)



Source: S4C/BARB, all Individuals (4+). S4C Region.

Notes: New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

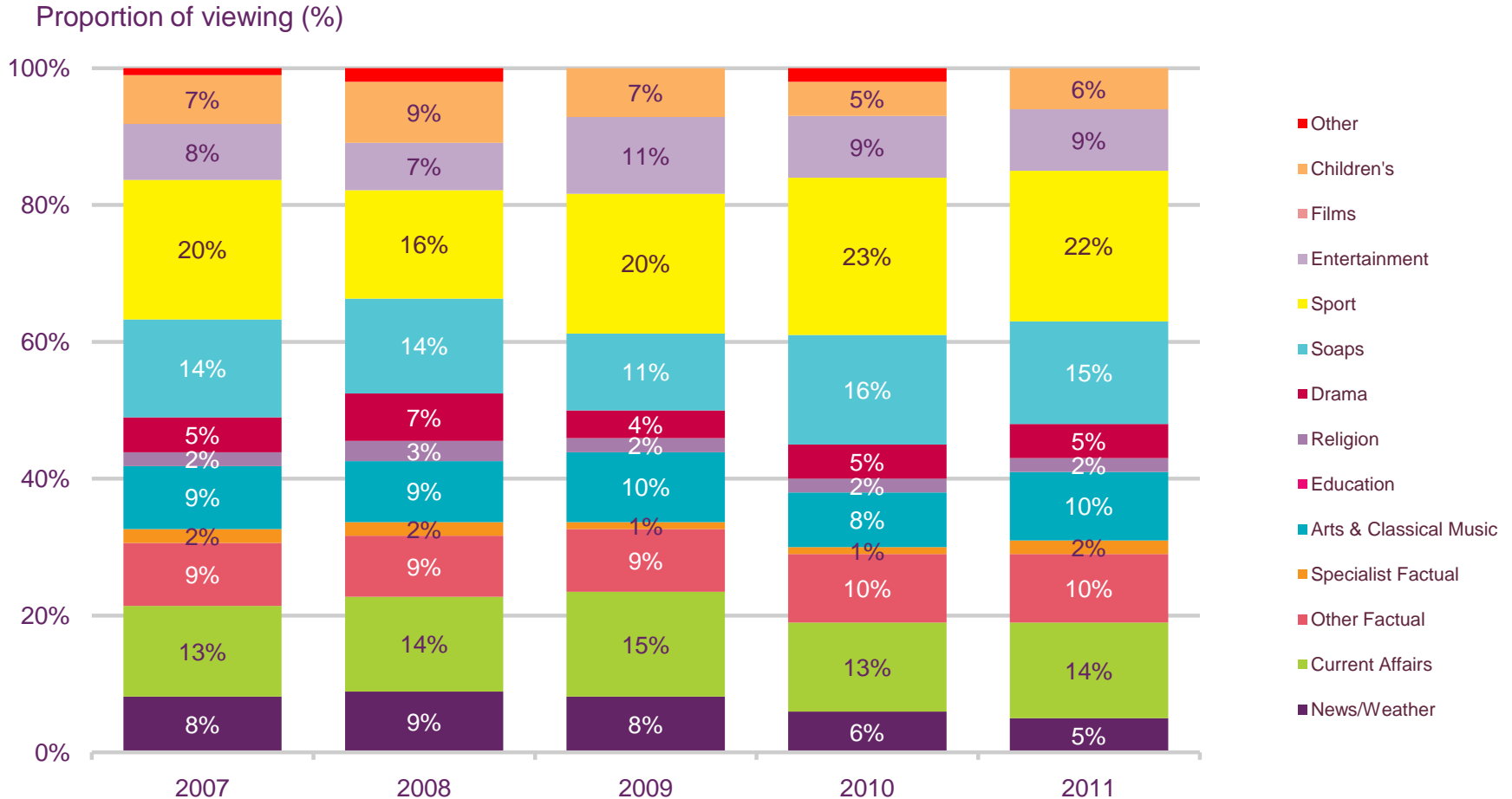
Fig 75 Share of viewing in Wales, all viewers, all hours and peak time, 2007 - 2011

| | Share (%) | |
|---------------|--------------------------|--------------------------|
| | All Hours (0600-3000) | Peak Time (1800-2230) |
| 2007 | 3.0% | 2.9% |
| 2008 | 2.7% | 2.9% |
| 2009 | 2.2% | 2.6% |
| 2010 * | 1.3% | 1.9% |
| 2011 * | 1.3% | 2.0% |

Source: S4C/Infosys. S4C Region, All Individuals.

* BARB introduced a new panel on 1st January 2010 and a new regional definition of Wales was used instead of 'any homes that could receive S4C', this increased the universe population. Other changes saw the inclusion of Channel 4 and all ITV1 viewing (not just the ITV Wales region) to the share calculation. This meant the Total TV figure increased which has resulted in a step change in S4C's share figures, as illustrated in the table above.

Fig 76 Proportion of viewing of genres on S4C, 2011



Source: S4C/BARB/Infosys (BARB). S4C Region, All Individuals.

New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

*News & Weather on S4C is for Wales only, but for the purpose of this graph data has been placed in the National News/Weather category