

C – PSB Viewing

PSB Report 2013 – Information pack
August 2013

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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 the analysis was conducted). All analysis is based on data as of January/February 2013. *(Note: The BARB viewing figures use different datasets to the output figures in information pack D, which have slightly different programme classifications).*
- The analysis presented is based on BARB data extracted from the Kantar Media InfoSys+ system. This is a new system which was introduced in 2012 and as a result there maybe some minor data variations compared with previously presented data.

Background and notes

- 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; BBC One, BBC Two, ITV, Channel 4, S4C, Channel 5, BBC Three, BBC Four, CBeebies, CBBC, BBC News, BBC Parliament and BBC HD.

(Note: Channel 4 data for 2007-2009 includes S4C viewing as Channel 4 content was carried on S4C. Following DSO in Wales in 2010, Channel 4 programming ceased to be broadcast on S4C and so data from 2010 onwards relates to viewing to Channel 4 only).

- 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.
- Due to the use of large datasets, there may be some minor data discrepancies as a result of rounding.

Definitions: Channel groups

Main five PSB channels	BBC portfolio channels	Commercial PSBs' portfolio channels	
BBC One (inc HD)	BBC Three	ITV+1	More4
BBC Two	BBC Four	ITV2 (inc HD)	More4+1
ITV (inc HD)	BBC HD	ITV2+1	Film 4
Channel 4 (inc HD)	BBC News	ITV3 (inc HD)	Film 4+1
Channel 5 (inc HD)	BBC Parliament	ITV3+1	4Music
	CBeebies	ITV4 (inc HD)	4seven
	CBBC	ITV4+1	Channel 5+1
		CITV	5*
		Ch4+1	5*+1
		E4	5 USA
		E4+1	5 USA+1

Channel 4 data for 2007-2009 includes S4C viewing as Channel 4 content was broadcast on S4C. Following DSO in Wales in 2010, Channel 4 programmes ceased to be carried on S4C and so 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 Documentaries: Celebrity
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 News: Misc

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 Documentaries: Celebrity
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 among all individuals aged 4+ increased from 3.6 hours in 2007 to 4.0 hours in 2012. Year-on-year figures between 2011 and 2012 remained stable at 4.0 hours per day (Figure 1).
- The greatest increase in viewing was seen between 2009 and 2010 – it is possible that part of this increase was attributable to effects of the BARB panel change. Viewing figures post-panel change (2010-2012) appear to be fairly stable. The greatest increases in viewing were among viewers aged 55 or over, who also continue to be the heaviest television viewers (Figure 1).
- Among all individuals, overall viewing to the PSB channels has remained fairly stable between 2007 and 2012. Looking at trend data in more detail shows that following a slight fall in viewing between 2007-2009, followed by a slight upward trend between 2009 and 2010 (possibly an effect of the BARB panel change), there has been a slight downward trend in viewing to PSB channels between 2010-2012. Viewing in 2012 appears to have returned to 2009 levels across most age groups (Figure 2).
- When looking at the breakdown of Total TV viewing by channel groups, the main five PSB channels accounted for 2.1 hours of viewing per day in 2012, compared with 1.1 hours spent watching *Other multichannels*. The BBC and Commercial PSBs' portfolio channels accounted for 0.8 hours of viewing per day, suggesting that taken together, channels owned by the main five PSB channels accounted for 2.9 hours of viewing per day (Figure 3).
- Total TV viewing increases by age groups. Analysis of the breakdown of this viewing shows that the number of hours spent watching *Other multichannels* remains fairly consistent across the age groups at around 1 hour per day. It is the time spent watching the main five PSB channels that accounts for the differences in total viewing hours (Figure 3).

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 – All homes*

- While the average weekly reach of BBC One and Channel 5 in all homes has remained relatively stable between 2007-2012, BBC Two, ITV and Channel 4 have all seen a decline in reach figures. ITV's reach fell from 70.0% in 2007 to 63.8% in 2012. Over the same period BBC Two's reach fell by 6.2 percentage points from 58.0% to 51.8% and Channels Four's reach fell from a similar point of 58.8% in 2007 to 50.6% in 2012 (Figure 4).
- When combined with their respective digital portfolio** channels, the average weekly reach figures for each of the main PSB channel groups show more stable trends for each of the broadcasters between 2007-2012. The combined reach of the BBC channels stood at 85.8% in 2012, down slightly from 86.7% in 2011. Following fairly stable reach between 2007-2011, the ITV channels saw a slight dip in reach from 75.7% in 2011 to 73.9% in 2012 (Figure 5).
- Figures 6-9 look at the combined average weekly reach for each of the channel groups compared with the average weekly reach of the main PSB channels and the additional reach accounted for by the digital portfolio channels. In 2007, the combined weekly reach of BBC One and BBC Two was 82.3% and the combined reach of all BBC channels was 84.9% - with the digital channels accounting for 2.7% in additional reach. In 2012, the weekly reach of BBC One and BBC Two had dropped marginally to 81.2% with the digital channels representing 4.6% in additional reach (Figure 6). While ITV has seen a drop in reach between 2007-2012, its digital channels accounted for 10.0% in additional reach in 2012 (Figure 7). Similarly, while Channel 4's reach has fallen from 58.1% in 2007 to 50.6% in 2012, its digital channels accounted for a further 15.3% reach in 2012, compared with 8.2% in 2012 (Figure 8). Channel 5's digital channels accounted for an additional 5.6% reach in 2012 (Figure 9).

* 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 :, BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBBC, CBeebies, ITV+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, CH4+1, 4Music, 4seven, 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.

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 – Multichannel homes*

- Weekly reach in multichannel homes for many PSB channels fell between 2011 and 2012. While BBC One's weekly reach in multichannel homes increased from 76.7% in 2007 to 77.8% in 2012, it fell from 79.0% in 2011. ITV's weekly reach has continued to decline, falling from 66.7% in 2011 to 63.8% in 2012 (Figure 10).
- Similarly, BBC Two, Channel 4 and Channel 5 have all seen their respective weekly reach figures in multichannel homes fall from 2007 levels, with most noticeable differences taking place between 2011 and 2012 (Figure 10).
- BBC's portfolio channels all gained reach on 2007 levels. Most notably, BBC Four increased its weekly reach from 12.0% in 2011 to 14.1% in 2012, while BBC News saw its reach fall from 12.7% in 2011 to 11.6% in 2012 (Figure 10).
- The average weekly reach of all of the PSB portfolio channels combined** in multichannel homes increased from 66% in 2007 to 77% in 2012. While the main five PSB channels have seen a fall in weekly reach between 2011 and 2012, all portfolio channel groups saw a slight upward trend in weekly reach over the same period. (Figure 11).
- 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. (Figure 11).

* 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.

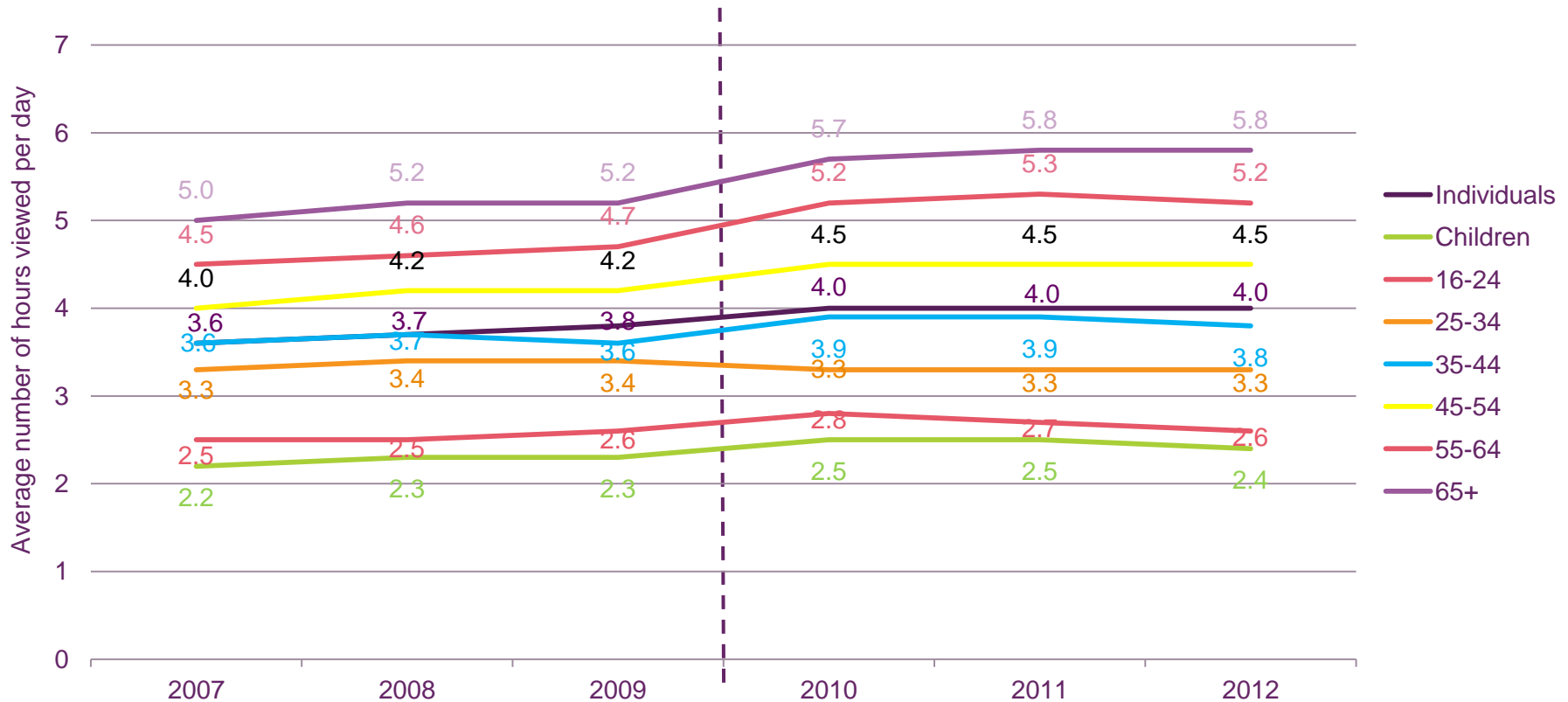
**Portfolio channels :, BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBBC, CBeebies, ITV+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, CH4+1, 4Music, 4Seven, E4 Total, More4 Total, Film4 Total, 5* Total, 5 USA Total.

-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, 2007-2012

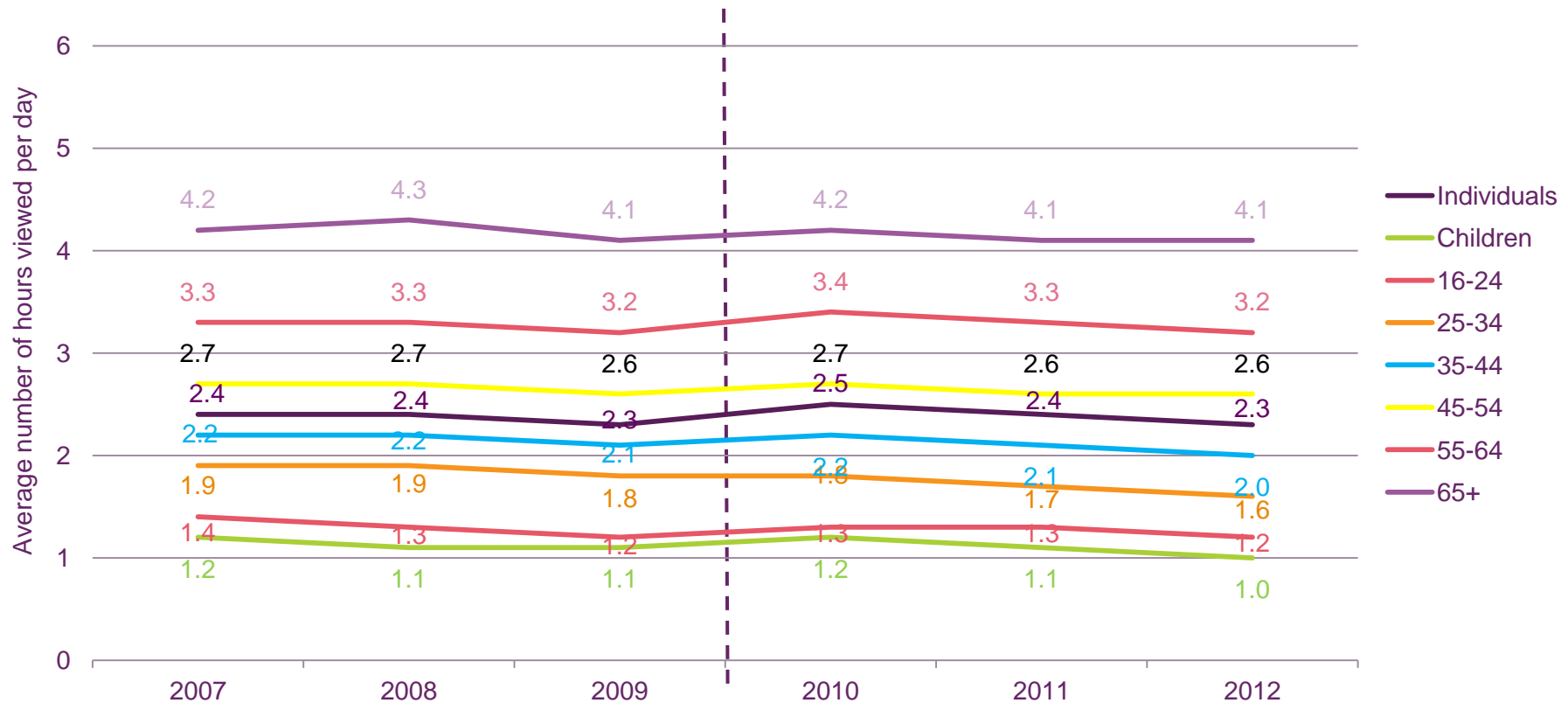


Source: BARB, All Individuals, Network. Individuals= 4+, Children= 4-15 years. Average hours of viewing per day, Total TV.
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Overview of hours watched and reach



Fig 2 Average hours of daily viewing - PSB channels, 2007-2012



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, ITV, C4, S4C, Channel 5, BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBeebies, CBBC
 - C4 2007-09 includes S4C as Channel 4 content was carried on the channel; from 2010 it is excluded as S4C ceased to carry Channel 4 content 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, 2012



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

Fig 4 Average weekly reach of the main PSB channels – All homes, 2007-2012

15+ consecutive minute weekly reach (%)



Source: BARB. All Individuals, Network.

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

- *C4 2007-09 includes S4C as Channel 4 content was broadcast on S4C; from 2010 it is excluded as S4C ceased to carry Channel 4 content following DSO in Wales. S4C weekly reach 2012 = 0.6%.

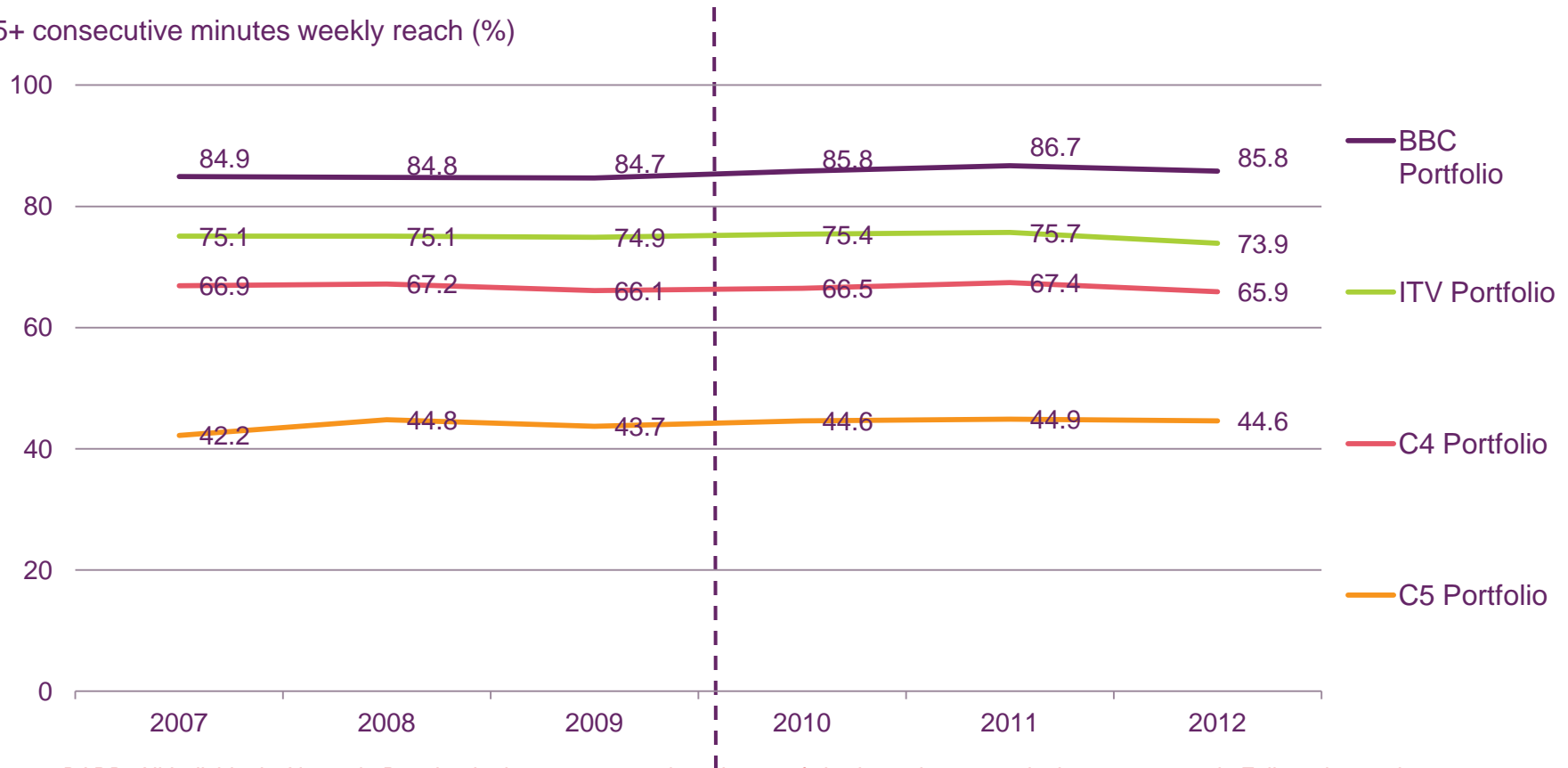
- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Overview of hours watched and reach



Fig 5 Average weekly reach of PSB portfolio groups including main PSB channels - All homes, 2007-2012

15+ consecutive minutes weekly reach (%)



Source: BARB. All Individuals, Network. Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used.

-BBC = BBC One, BBC Two, BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBeebies, CBBC

-ITV = ITV, ITV+1, ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV

-Channel 4 = Channel 4, Channel 4+1, E4, E4+1, More4, More4+1, Film4, Film4+1, 4Music, 4Seven – 2007-2009 S4C included, 2010+ S4C excluded

-Channel 5 = Channel 5, Channel 5+1, 5*, 5*+1, 5USA, 5USA+1

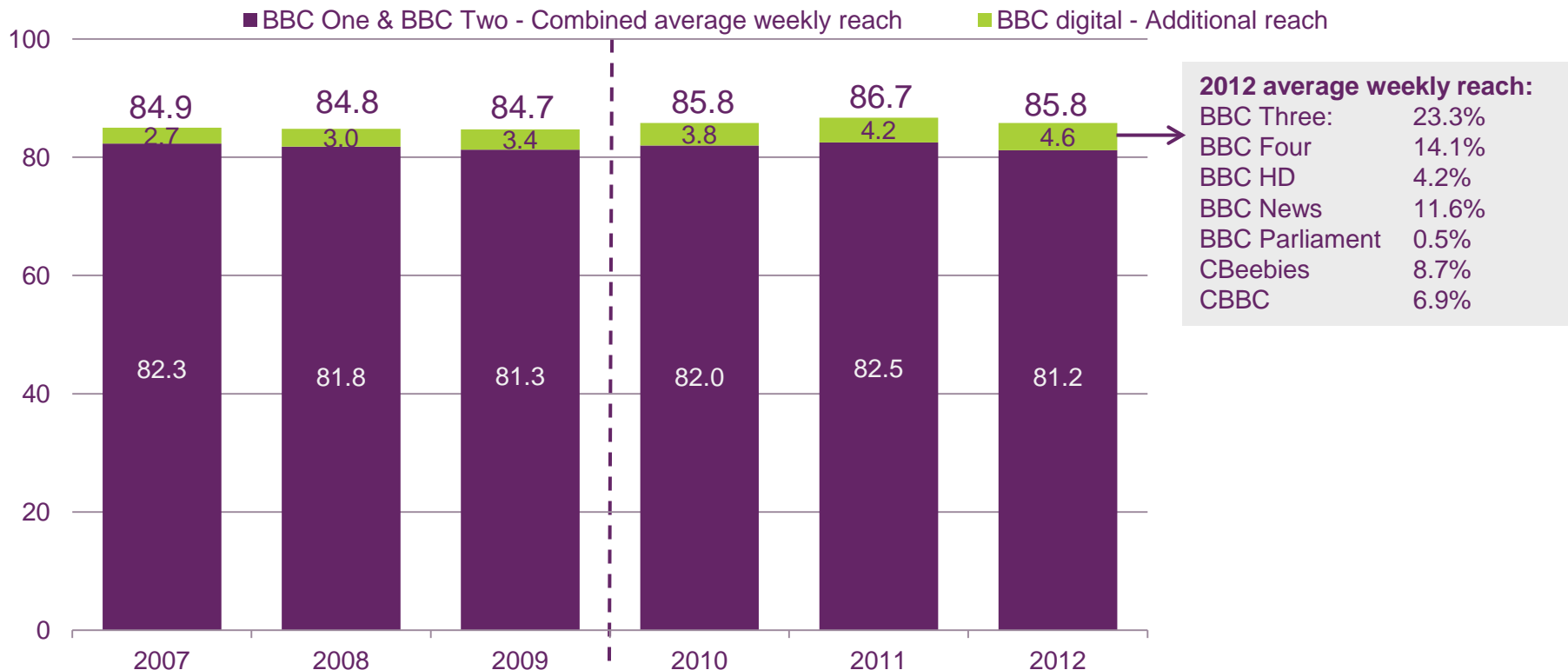
-Actual number of channels that make up the PSB portfolios has increased over the years, and the proportion of people with multichannel television has also grown substantially year on year. New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution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

Overview of hours watched and reach



Fig 6 Average weekly reach of BBC portfolio split by main PSB channels and digital channels – All homes, 2007-2012

15+ consecutive minute weekly reach (%)



Source: BARB. All Individuals, Network. Analysis looks at reach of all BBC channels combined, BBC One + BBC Two and the additive reach from the digital channels.

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

-BBC digital = BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBeebies, CBBC

-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.

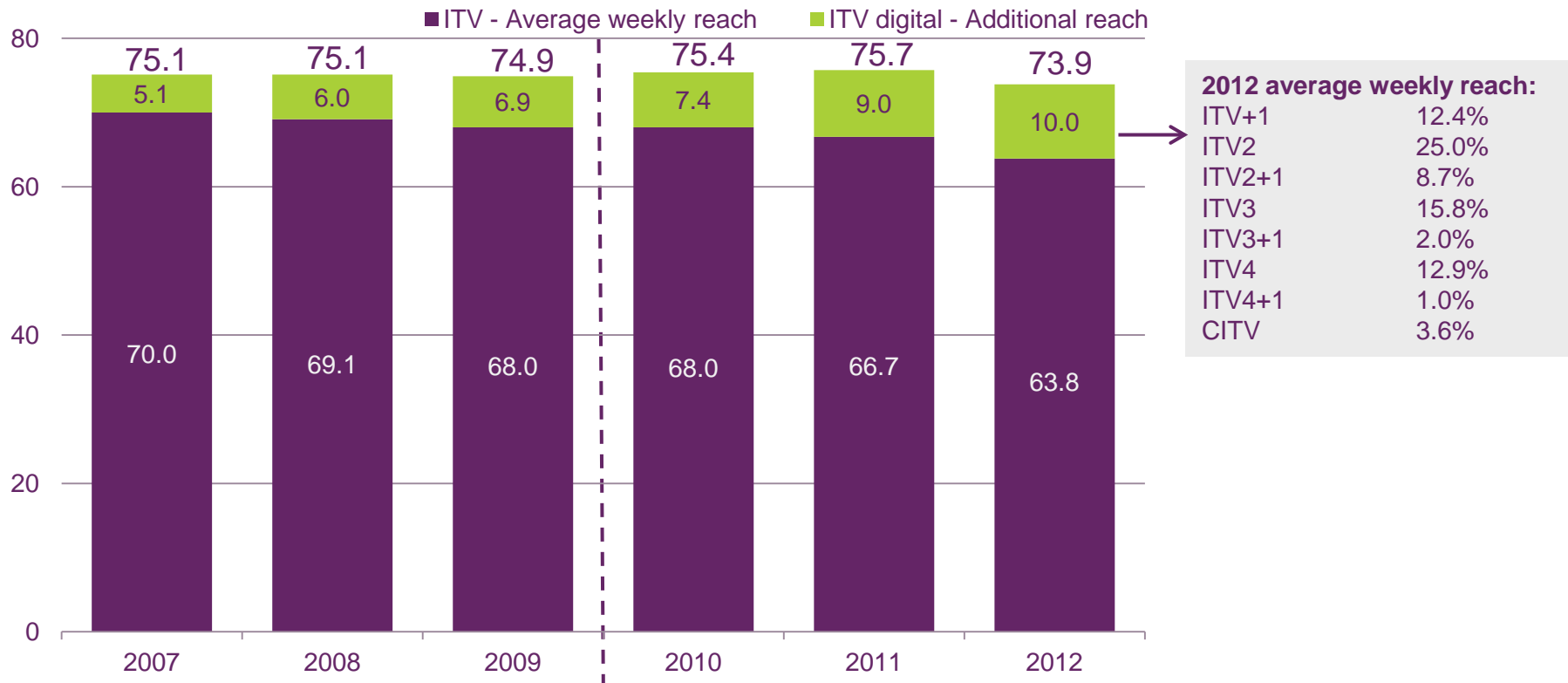
--New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).

Overview of hours watched and reach



Fig 7 Average weekly reach of ITV portfolio split by main PSB channels and digital channels – All homes, 2007-2012

15+ consecutive minute weekly reach (%)



Source: BARB. All Individuals, Network. Analysis looks at reach of all ITV channels combined, ITV and the additive reach from the digital channels.

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

-ITV digital = ITV+1, ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV

-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.

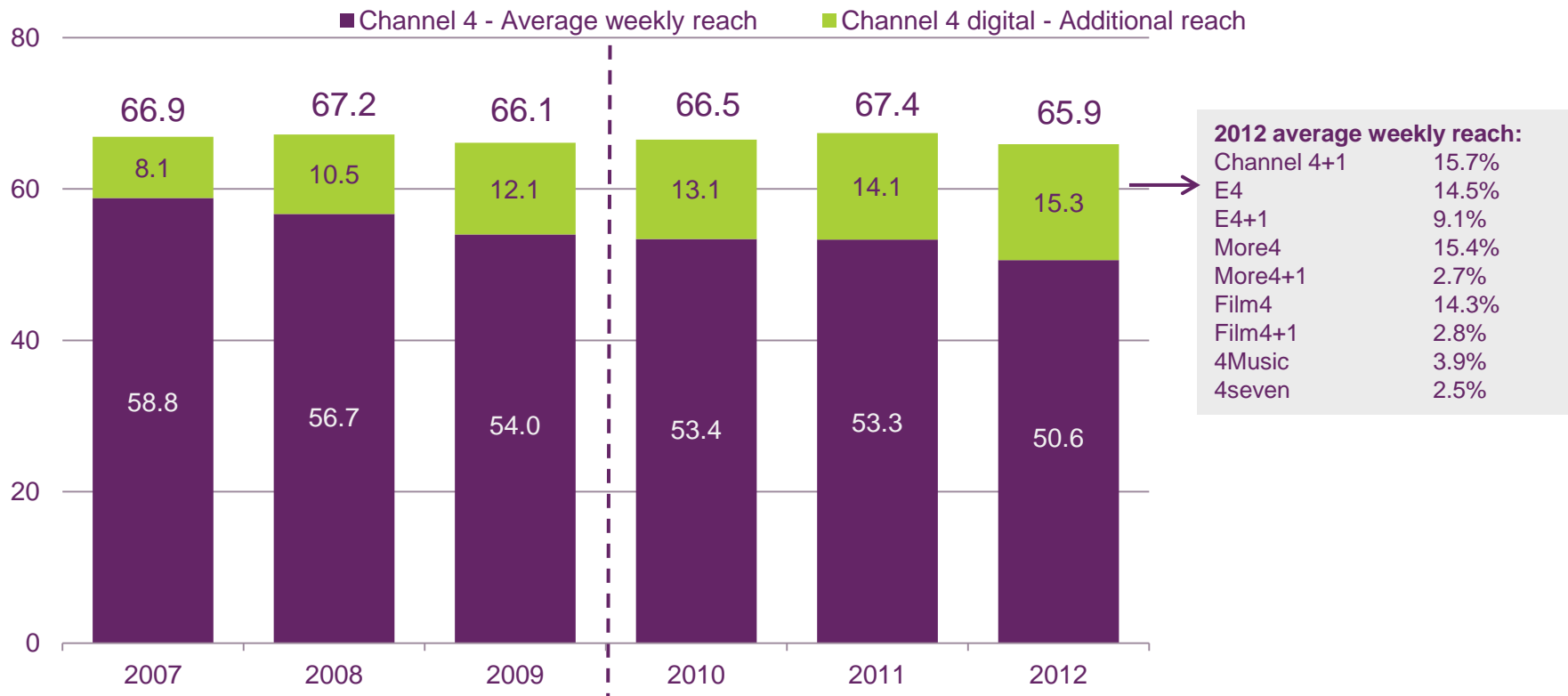
--New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).

Overview of hours watched and reach



Fig 8 Average weekly reach of Channel 4 portfolio split by main PSB channels and digital channels – All homes, 2007-2012

15+ consecutive minute weekly reach (%)



Source: BARB. All Individuals, Network. Analysis looks at reach of all Channel 4 channels combined, Channel 4 and the additive reach from the digital channels.

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

-Channel 4 digital = Channel 4+1, E4, E4+1, More4, More4+1, Film4, Film4+1, 4Music, 4seven. 2007-2009 S4C included in Channel 4, 2010+ S4C excluded

-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.

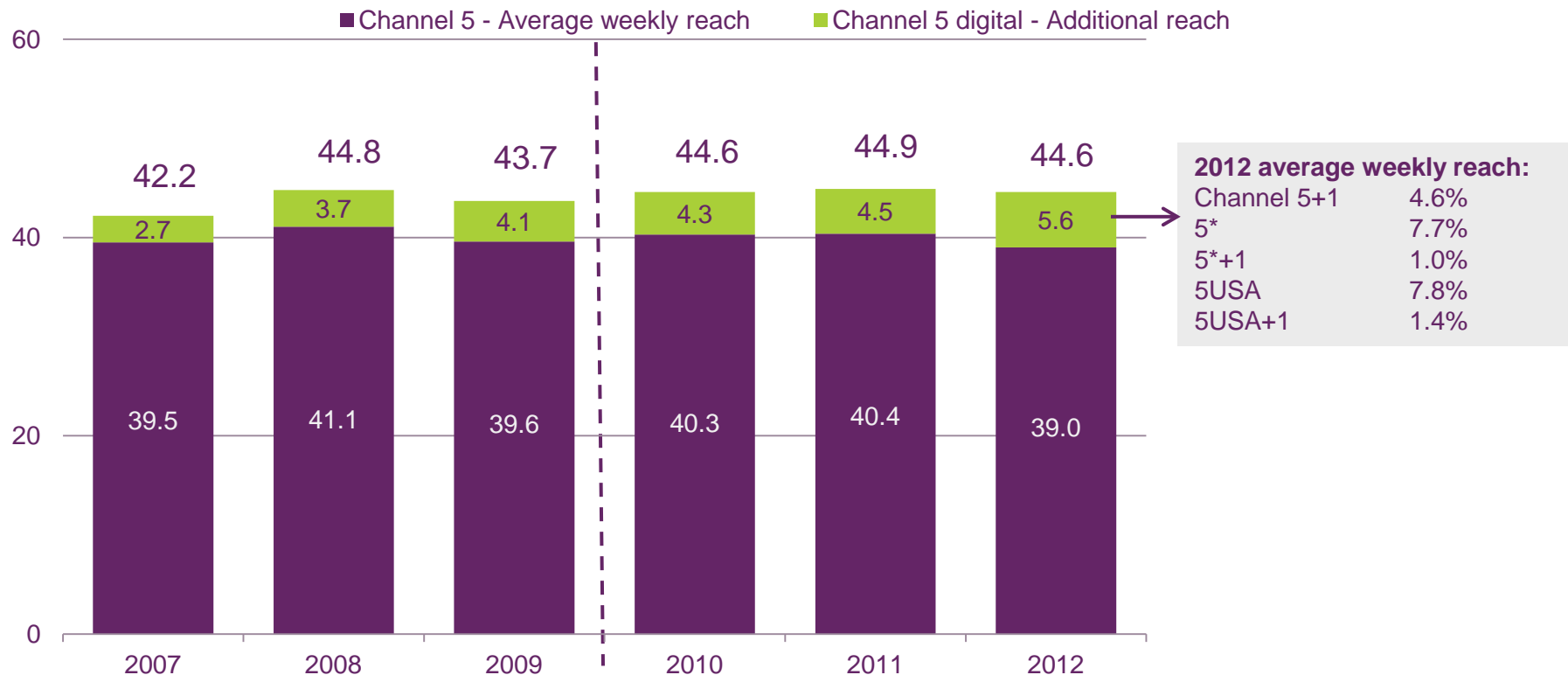
--New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).

Overview of hours watched and reach



Fig 9 Average weekly reach of Channel 5 portfolio split by main PSB channels and digital channels – All homes, 2007-2012

15+ consecutive minute weekly reach (%)



Source: BARB. All Individuals, Network. Analysis looks at reach of all Channel 5 channels combined, Channel 5 and the additive reach from the digital channels.

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

-Channel 5 digital = Channel 5+1 , 5* , 5*+1, 5USA, 5USA+1

-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.

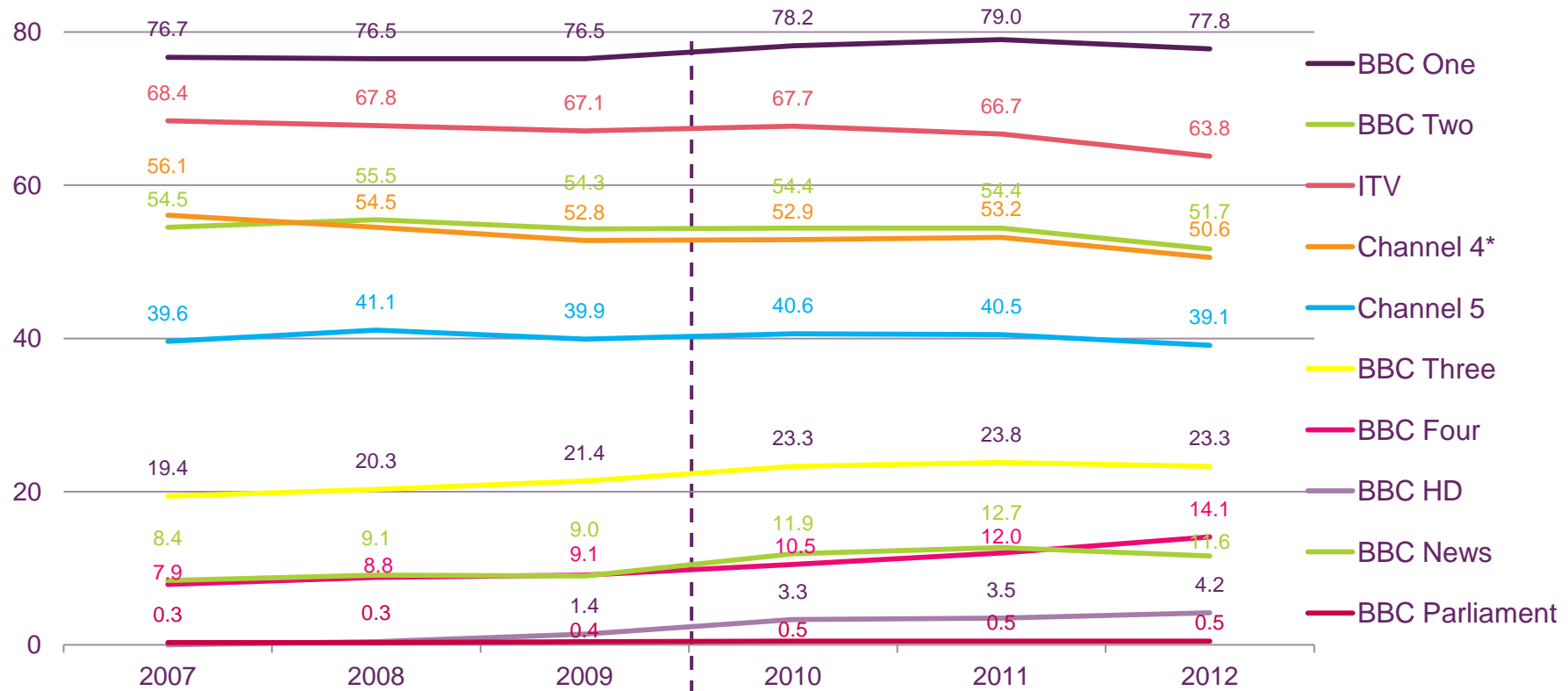
--New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).

Overview of hours watched and reach



Fig 10 Average weekly reach of PSB channels – Multichannel homes, 2007-2012

15+ consecutive minute weekly reach (%)



Source: BARB. 2007-2009: All individuals, Multichannel universe/ 2010+: All individuals in multichannel homes, Network universe.

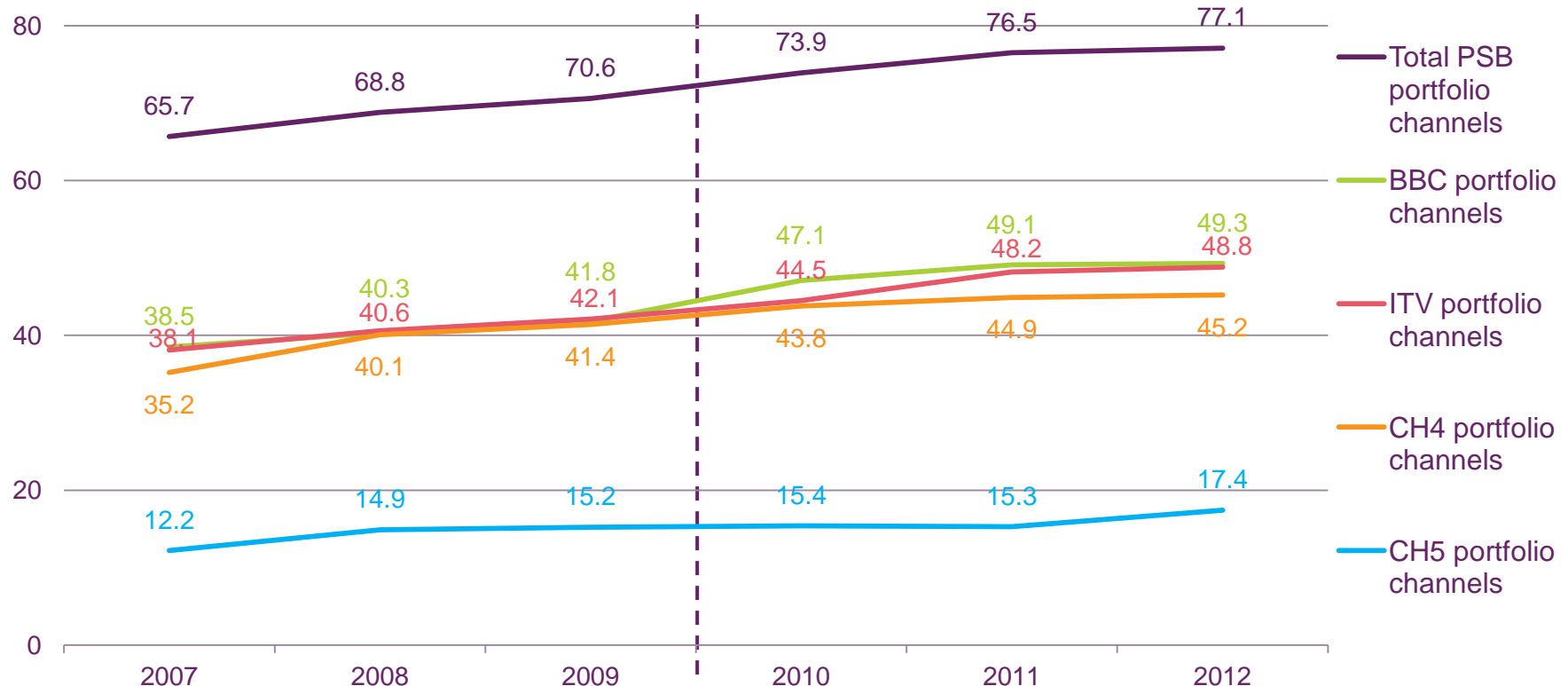
- Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used.

- *C4 2007-09 includes S4C as Channel 4 content was carried on the channel; from 2010 it is excluded as S4C ceased to carry Channel 4 content following -DSO in Wales. S4C weekly reach 2012 = 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 11 Average weekly reach of PSB portfolio channels – Multichannel homes, 2007-2012

15+ consecutive minute weekly reach (%)



Source: BARB. 2007-2009: 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: BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBBC, CBeebies, ITV+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, CH4+1, 4Music, 4Seven, E4 Total, More4 Total, Film4 Total, Ch5+1, 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 54% in 2011 to 52% in 2012. While all five PSB channels experienced minor changes in share between 2011 and 2012, this overall decline is represented in the main by the decline in ITV's share from 16% in 2011 to 15% in 2012. Viewing to *Others* continues to increase – this includes viewing to portfolio channels (Figure 12).
- Within peak time (18:00-22:30), shares for BBC Two, Channel 4 and Channel 5 remained fairly stable between 2011-2012. However, while BBC One saw its peak time share rise from 23% in 2011 to 24% in 2012, ITV saw its share fall by 1 percentage point to 20% over the same period (Figure 13).
- The main five PSB channels combined with their respective portfolio channels accounted for 73% of all viewing across the day in 2012 – rising to 78% during peak time. Taken together, viewing to PSB channels and their portfolio channels accounts for the majority of viewing across all age groups, both across the day and during peak time. While we know that the total time spent viewing *Other multichannels* is fairly stable across age groups at around 1 hour per day (Figure 3), the differences in Total TV viewing results in the variation in share represented by these channels (Figures 14 & 15).
- 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 26 channels in 2012 – this ranged from 9 channels among those aged 65 or over, who spent 67% of their viewing time on the main five PSB channels, to 35 among children who spent over 40% of their viewing time watching *Other multichannels*. Comparison with 2007 shows how viewing has diversified over time with more channels now representing 75% of viewing - among all individuals the number has risen from 18 channels in 2007 to 26 in 2012 (Figure 16).

*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.

- Analysis of trends in viewing to the main five PSB channels by television platform shows that these channels continue to dominate viewing in digital terrestrial homes, accounting for 61% of viewing in 2012 compared with 44% in cable/satellite homes – however, there has been a decline in this share as viewers diversify their viewing*. It is important to note that many households will have a combination of platforms within the home such as cable/satellite on the main set and digital terrestrial in the bedroom (Figure 17).
- Many households will also be able to access different platforms through the same television set. Analysis of the actual platform through which viewing takes place shows that in 2012, 53.1% of all viewing took place via the digital terrestrial signal. This was followed by 33.1% through a digital satellite signal and 12.6% through digital cable (Figure 18).
- Trend data looking at channel shares by the main PSB channels and their respective digital channels shows that while the main channels have experienced declining shares since 2007, the digital portfolio channels have gained share. Overall, the main PSB channels combined with their portfolio channels continue to represent around three-quarters of all television viewing (Figure 19).
- Over the analysis period, the digital portfolio channels have gained share as they become more established with viewers – but there has also been an increase in the number of channels offered by the main five PSB channels. Taken together the digital portfolio channels account for 21% of all viewing (Figure 20).

*The number of channels on the digital terrestrial platform has grown over this period. Digital terrestrial includes Freeview and BT Vision homes.

-Portfolio channels: BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBBC, CBeebies, ITV+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, CH4+1, 4Music, 4seven, E4 Total, More4 Total, Film4 Total, 5* Total, 5 USA Total.



Summary: Overview of share

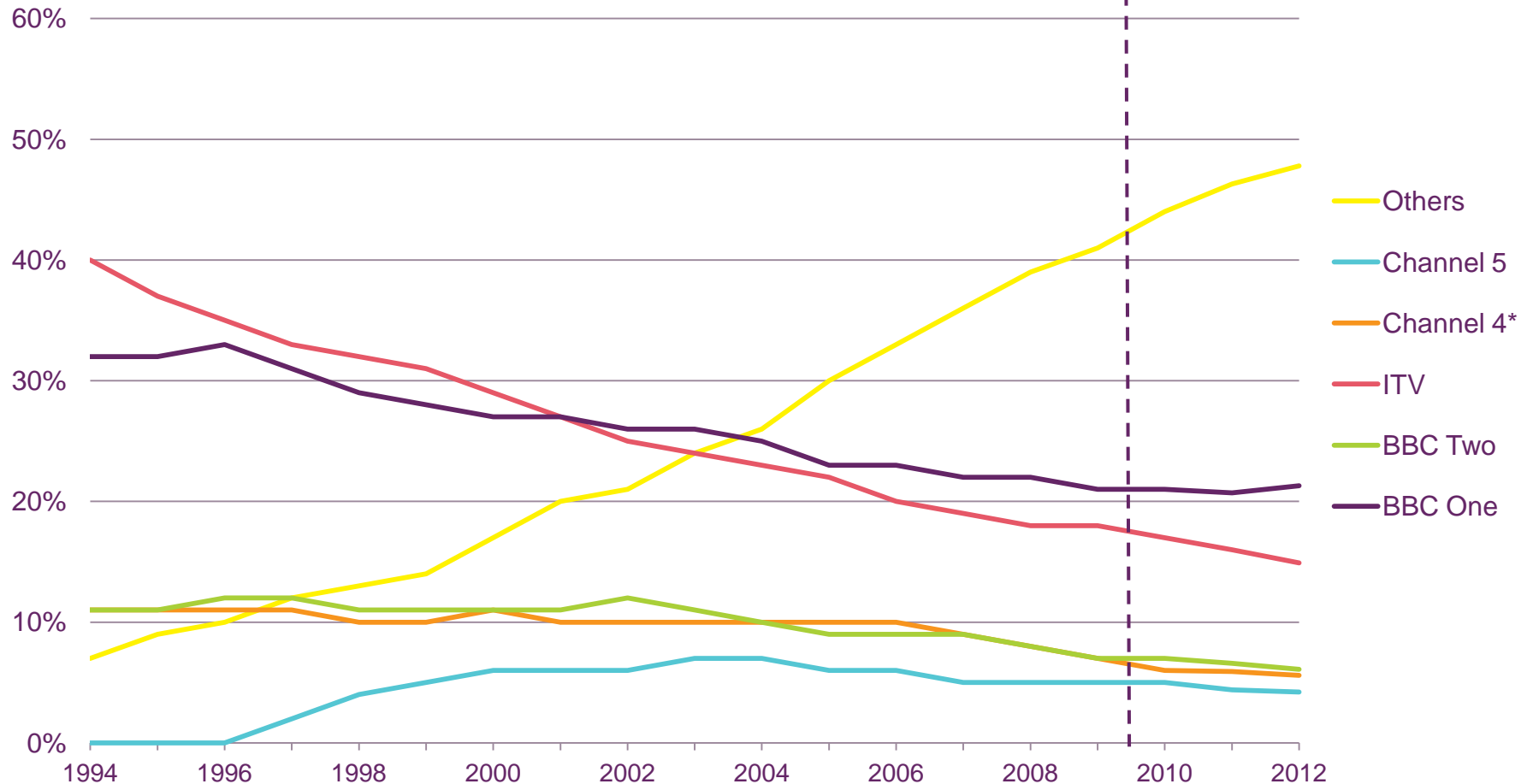
A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- Analysis of trend data among multichannel viewers shows that while the combined share of viewing to the main five PSB channels fell from 58% in 2002 to 52% in 2012, there has been a corresponding increase in the combined share of portfolio channels from 6% in 2002 to 21% in 2012. As a result PSB channels have seen their total combined share increase from 64% to 73%. Over the same period, share of viewing represented by Other multichannels decreased from 37% to 27% (Figure 21).
- Figures 22-24 look at how the variants (HD and '+1' channels) of the main PSB channels have impacted channel performance. These variants provide viewers with additional choices in terms of enhanced picture quality or the ability to timeshift viewing.
 - BBC One's HD variant has continued to grow since its launch and between June-August 2012 saw its share increase to 2%.
 - ITV's HD and +1 variants each account for around 1% of share.
 - In addition to the share of the main channel, which averaged 5% in 2012, the Channel 4 +1 variant adds a further 1% share, demonstrating the advantages of this increased choice to viewers. (Figures 22-24).

-Portfolio channels: BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBBC, CBeebies, ITV+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, CH4+1, 4Music, 4Seven, E4 Total, More4 Total, Film4 Total, 5* Total, 5 USA Total.



Fig 12 All day channel shares in all homes, 1994-2012

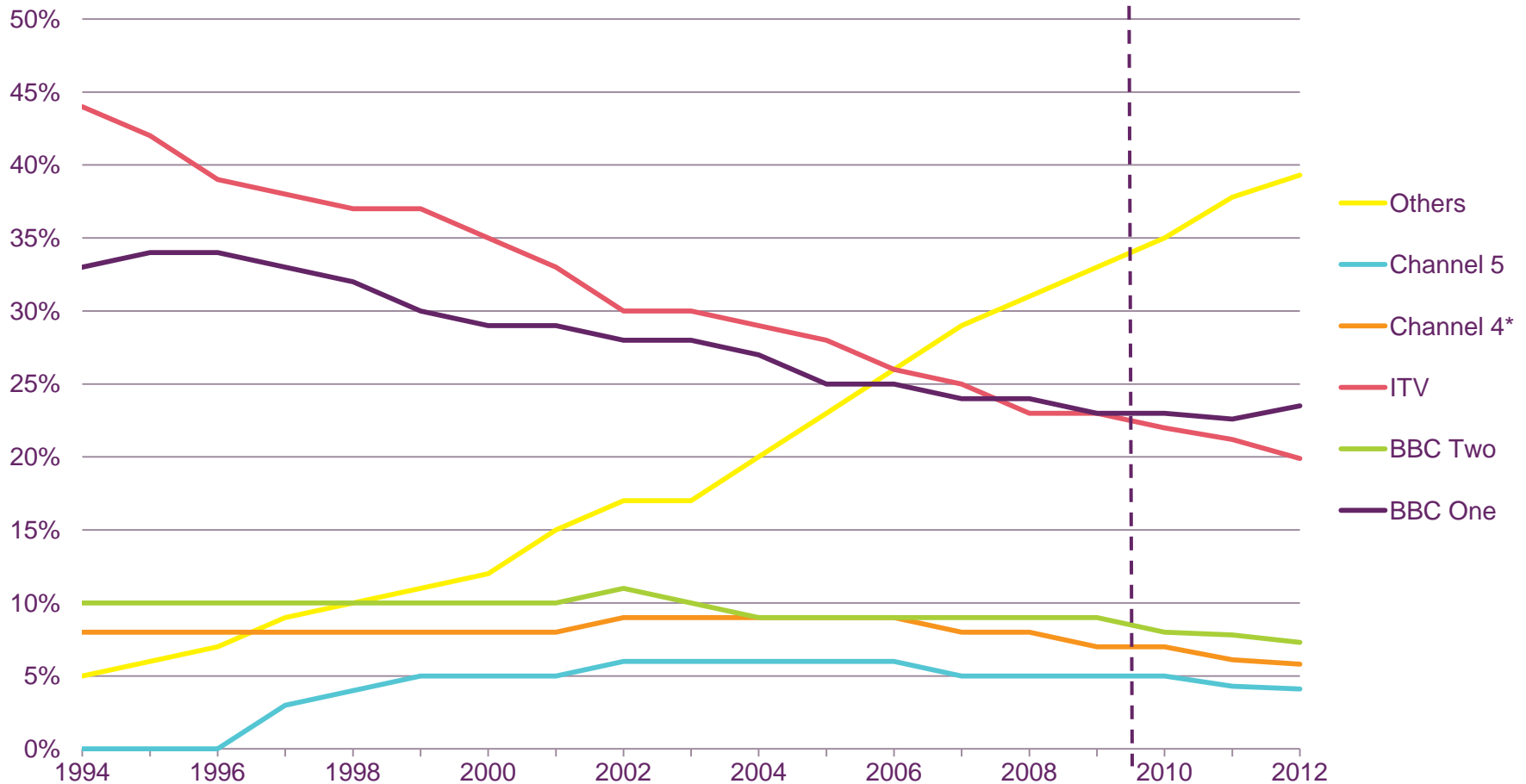


Source: BARB, All Individuals, Network.

* C4 data pre-2010 includes S4C as Channel 4 content was carried on S4C; from 2010 it is excluded as S4C ceased to broadcast Channel 4 content following DSO in Wales. S4C 2012 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 13 Peak time channel share in all homes, 1994-2012



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

-*C4 pre-2010 data includes S4C as Channel 4 content was carried on S4C; from 2010 it is excluded as S4C ceased to broadcast Channel 4 content following DSO in Wales. S4C 2012 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).



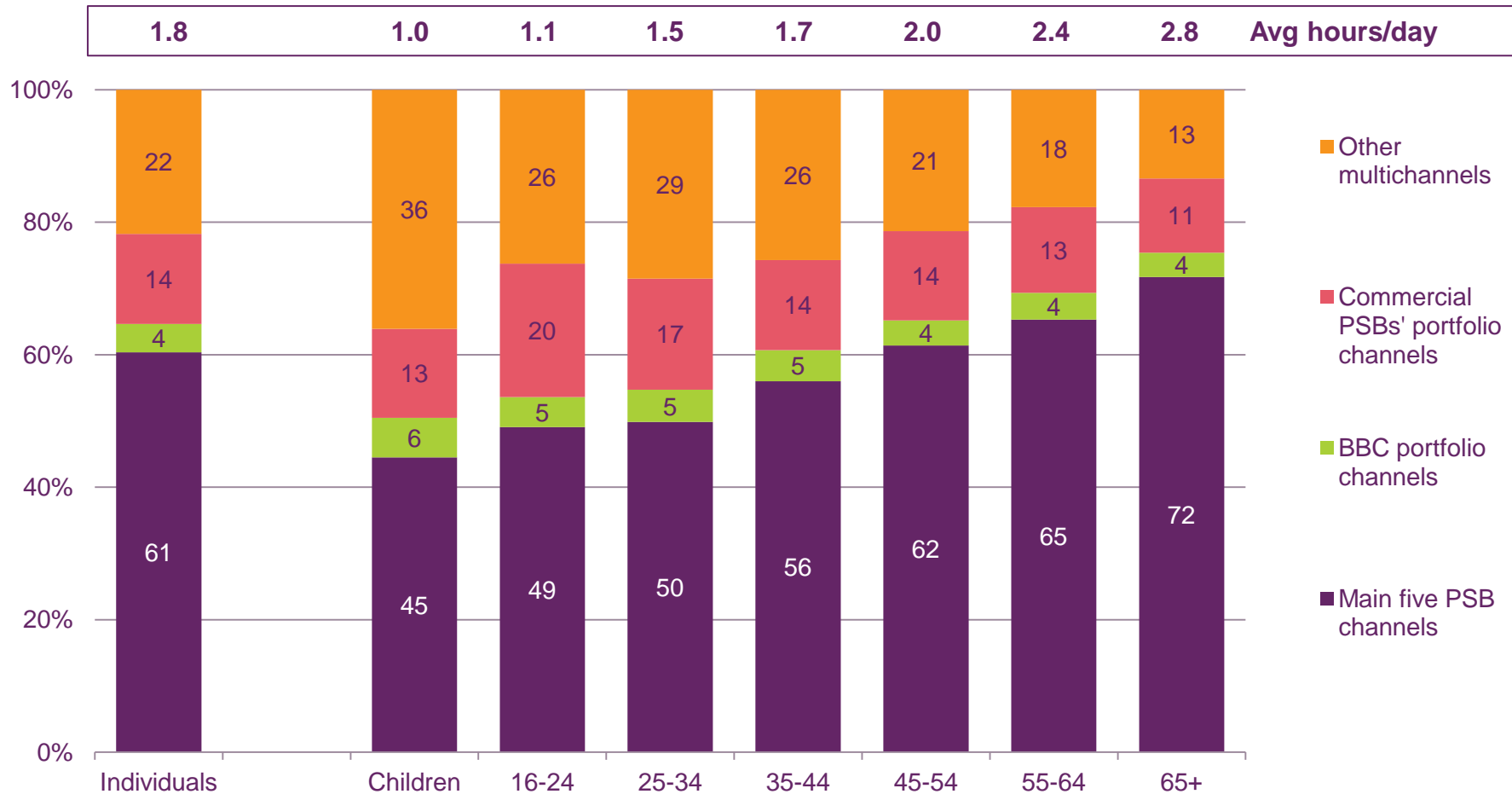
Fig 14 All day channel shares in all homes by channel group, 2012



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

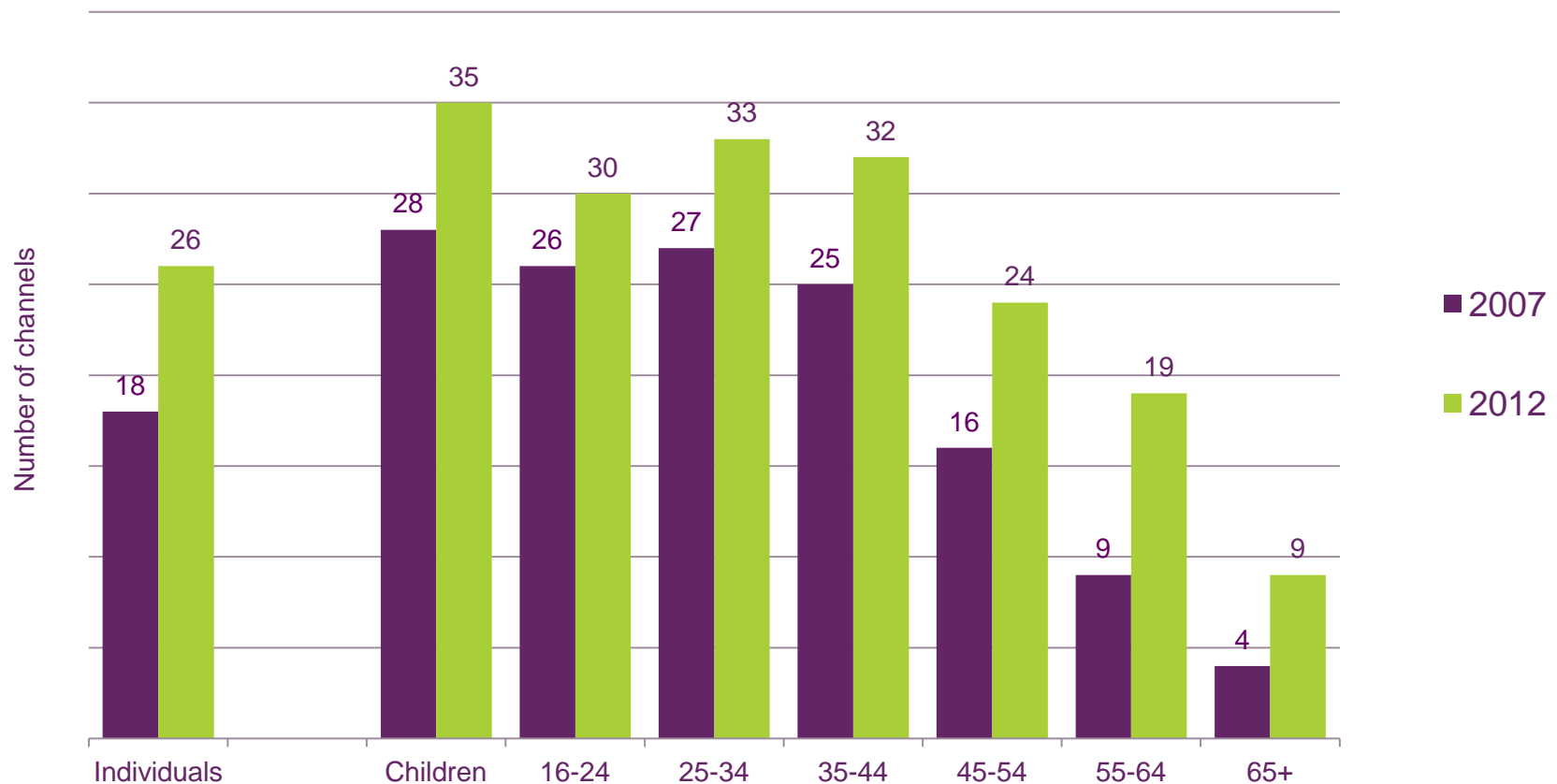


Fig 15 Peak time channel shares in all homes by channel group, 2012



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

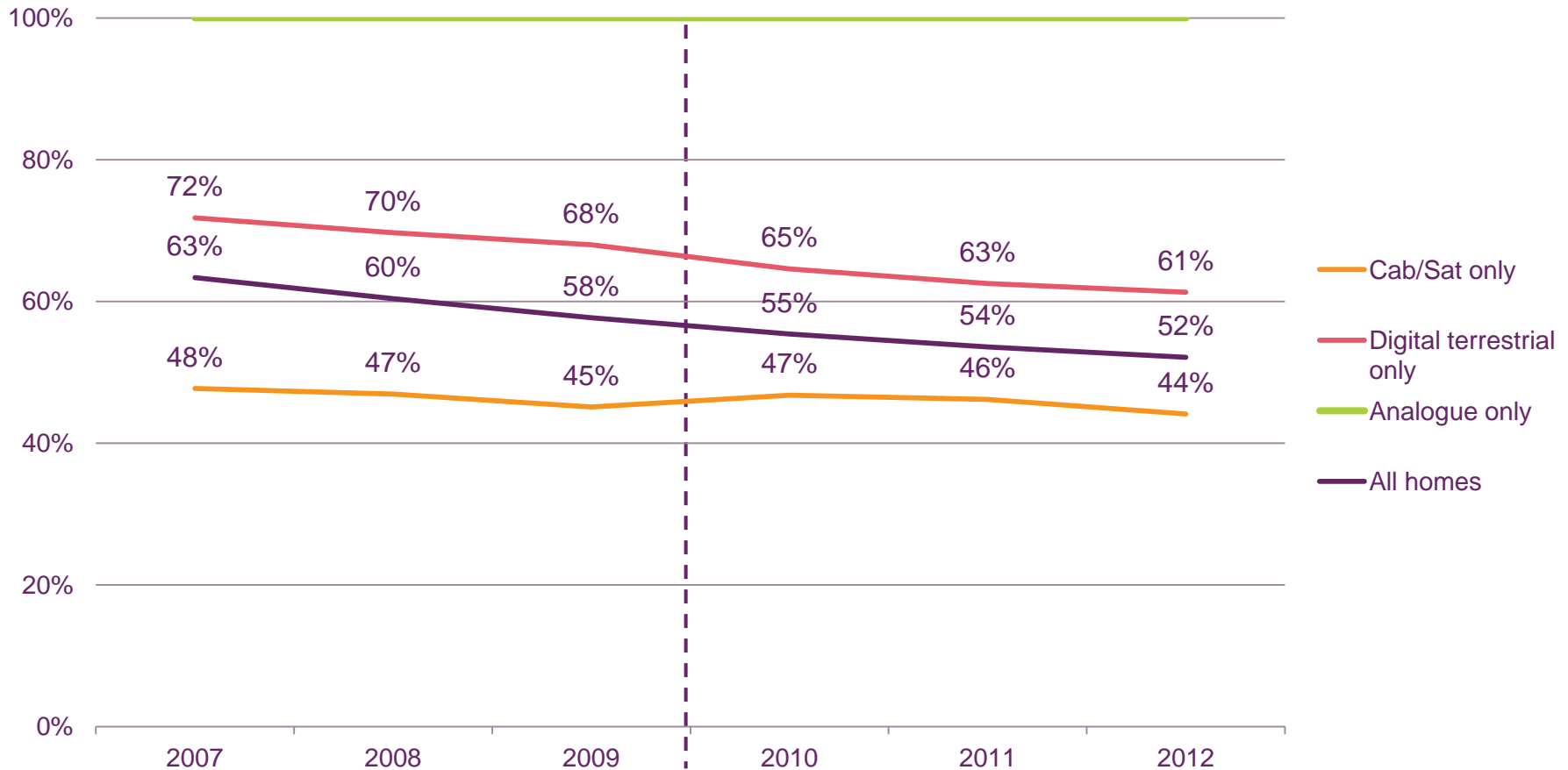
Fig 16 Number of channels representing 75% of viewing by age group, 2012



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 17 Main five PSB channels' share in homes with different television platforms, 2007-2012

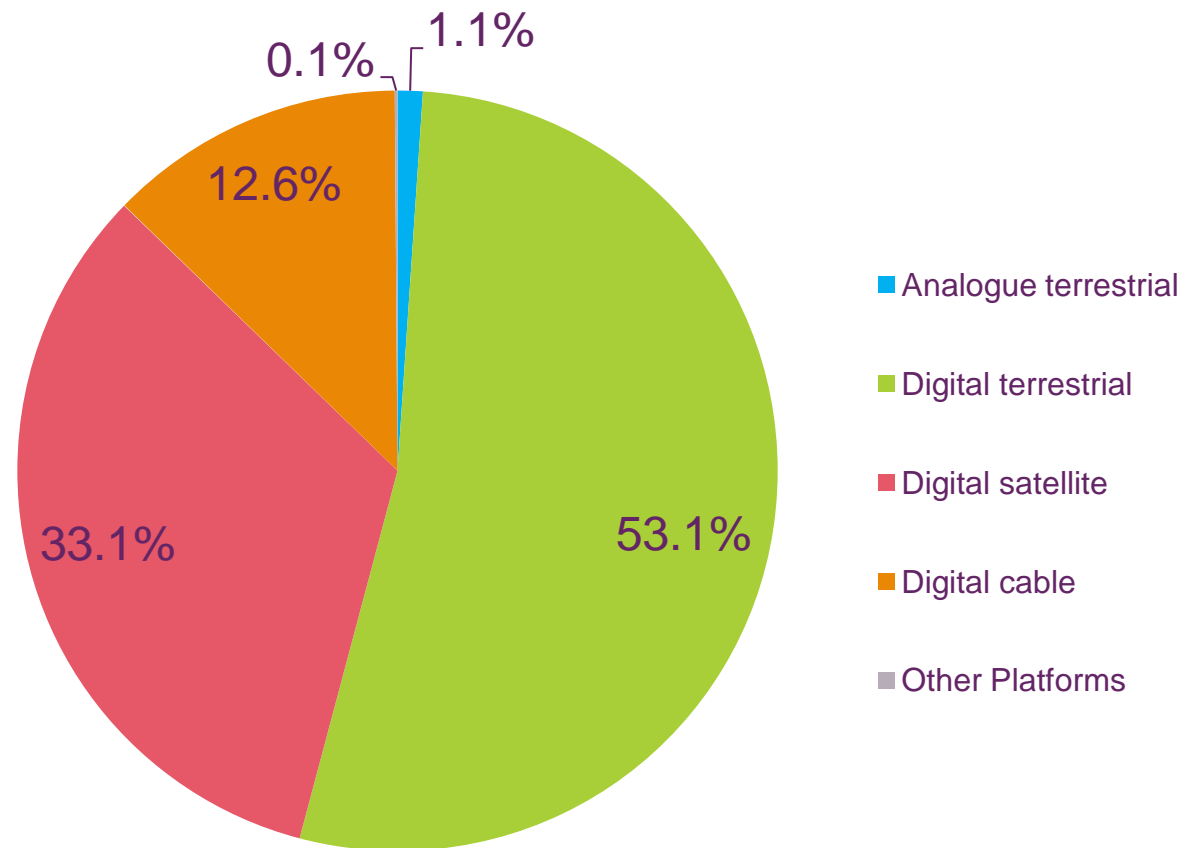


Source: BARB. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).

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

-C4 2007-09 data includes S4C as Channel 4 content was carried on S4C; from 2010 it is excluded as S4C ceased to broadcast Channel 4 content 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).

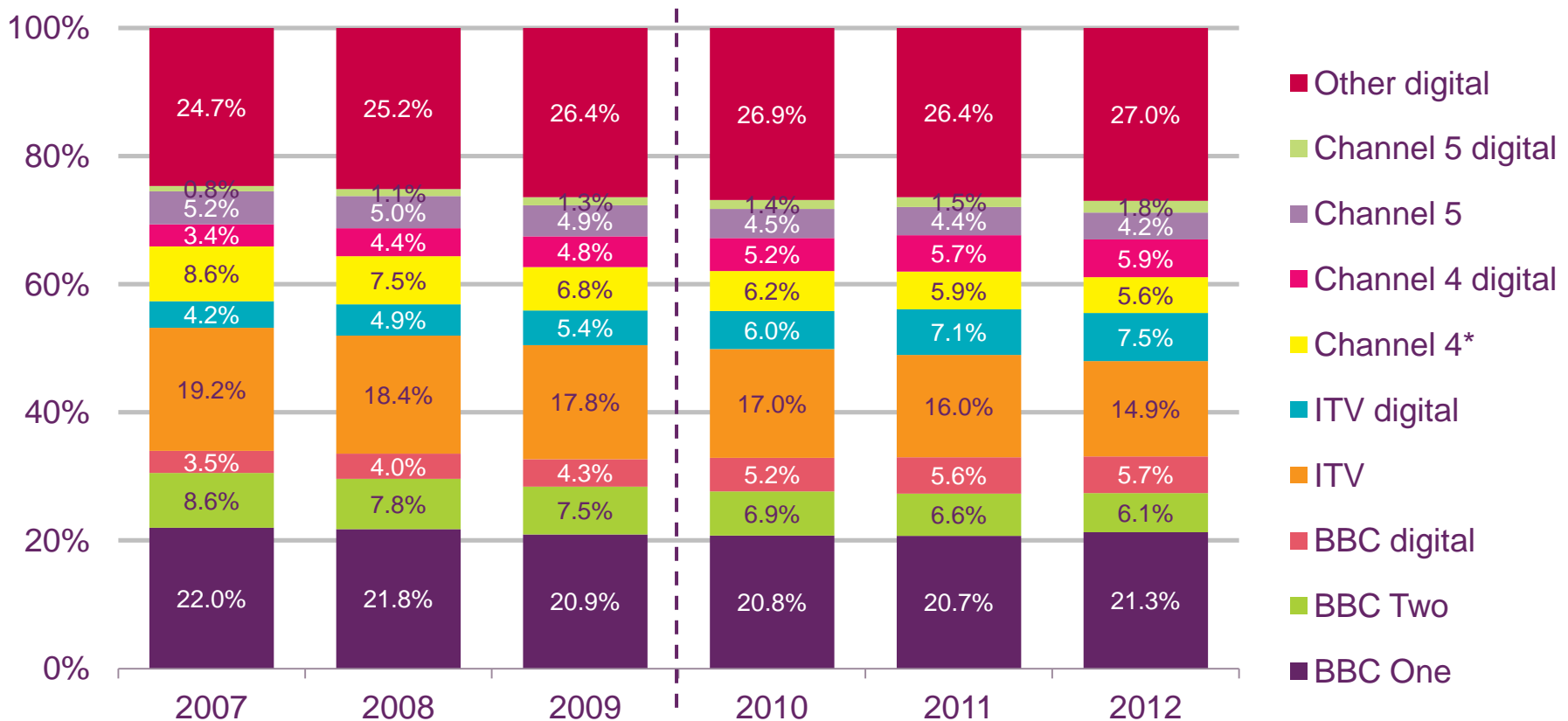
Fig 18 Viewing to main five PSB channels by platform, 2012



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -Data refers to actual 'signal' through which channel is viewed.



Fig 19 Channel shares for the main PSB channels and their digital portfolio channels – All homes, 2007-2012



Source: BARB, All Individuals, Network.

* C4 data 2007-09 includes S4C; from 2010 it is excluded as S4C ceased to carry Channel 4 programming following DSO in Wales. S4C 2012 share = 0.1%

-BBC digital = BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBeebies, CBBC

-ITV digital = ITV+1, ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV;

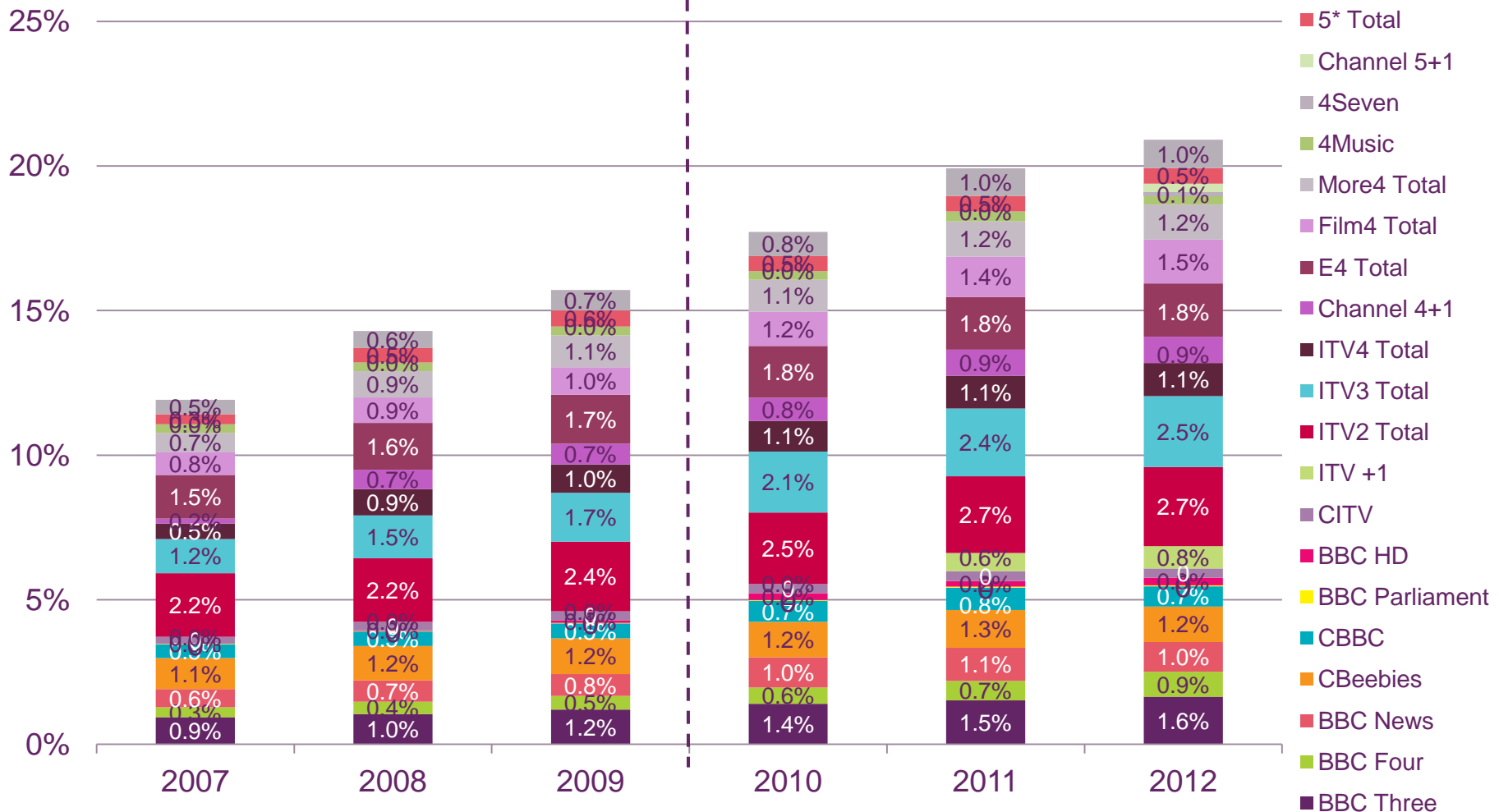
-Channel 4 digital = Channel 4+1, E4, E4+1, More4, More4+1, Film4, Film4+1, 4Music, 4seven

-Channel 5 digital = Channel 5+1, 5*, 5*+1, 5USA, 5USA+1

- 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 20 Channel shares for individual digital portfolio channels – All homes, 2007-2012

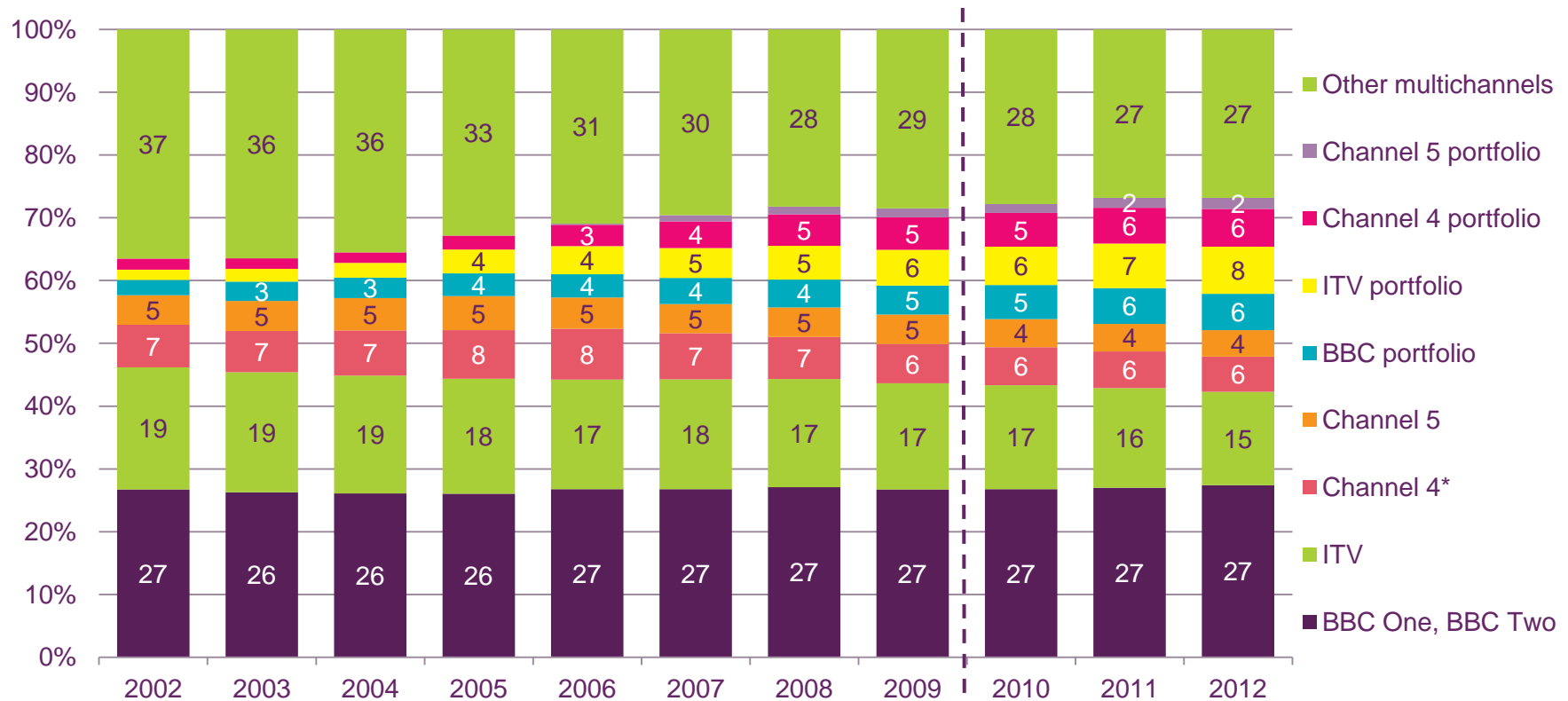


Source: BARB, All Individuals, Network.

-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 21 Shares in multichannel homes, 2002-2012



Source: BARB . 2007-2009: All individuals, Multichannel universe/ 2010+: All individuals in multichannel homes, Network universe.

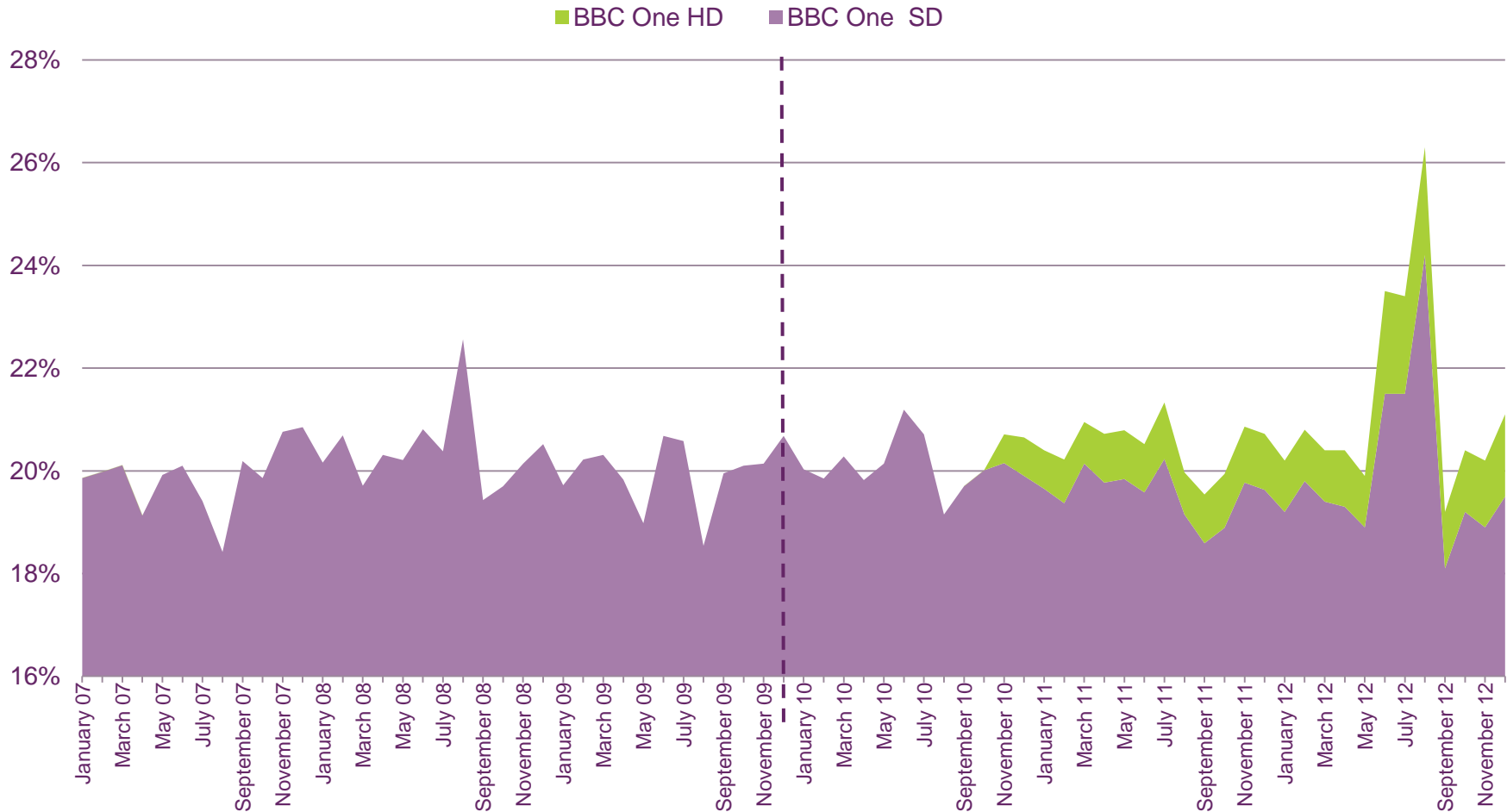
-The actual number of channels that make up the PSB portfolios has increased over the years, and the proportion of people with multichannel television has also grown substantially year on year.

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

*C4 2007-09 data includes S4C as Channel 4 content was carried on the channel; from 2010 onwards it is excluded as S4C ceased broadcasting Channel 4 content 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).



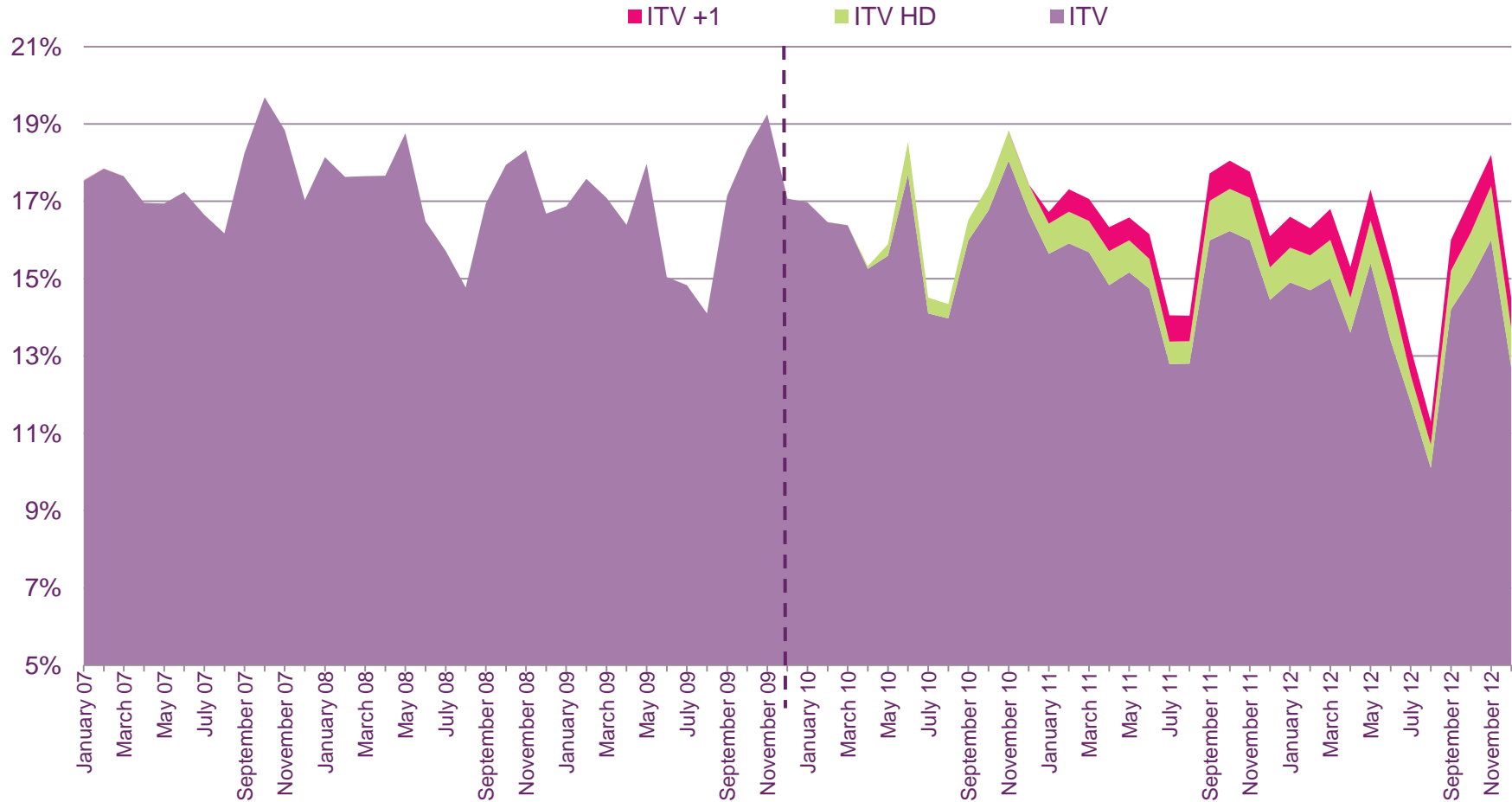
Fig 22 Channel share: BBC One variants, 2007-2012



Source: BARB. 2007-2009: 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).



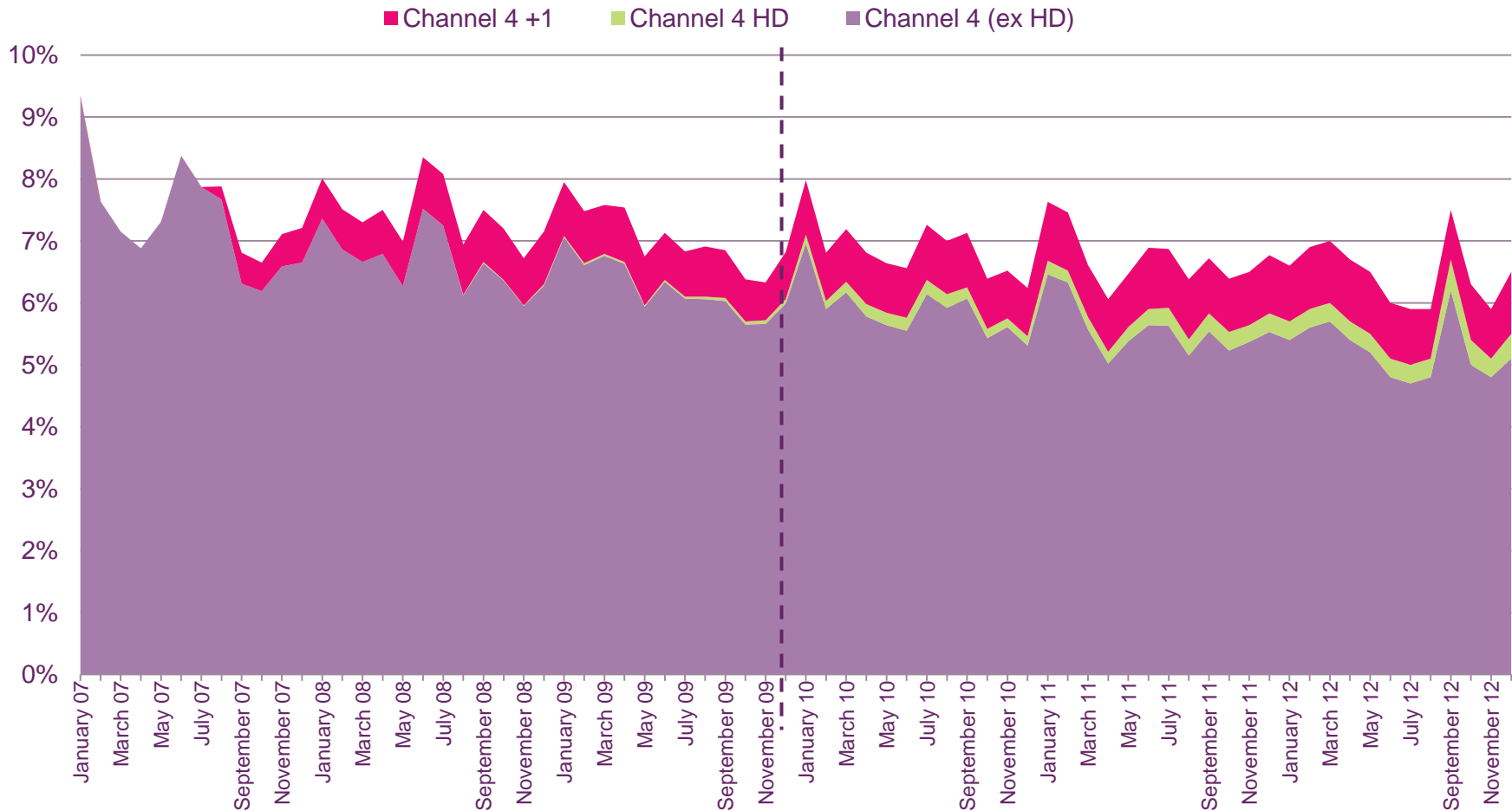
Fig 23 Channel share: ITV variants, 2007-2012



Source: BARB. 2007-2009: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 24 Channel share: Channel 4 variants, 2007-2012



Source: BARB. 2007-2009: 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).



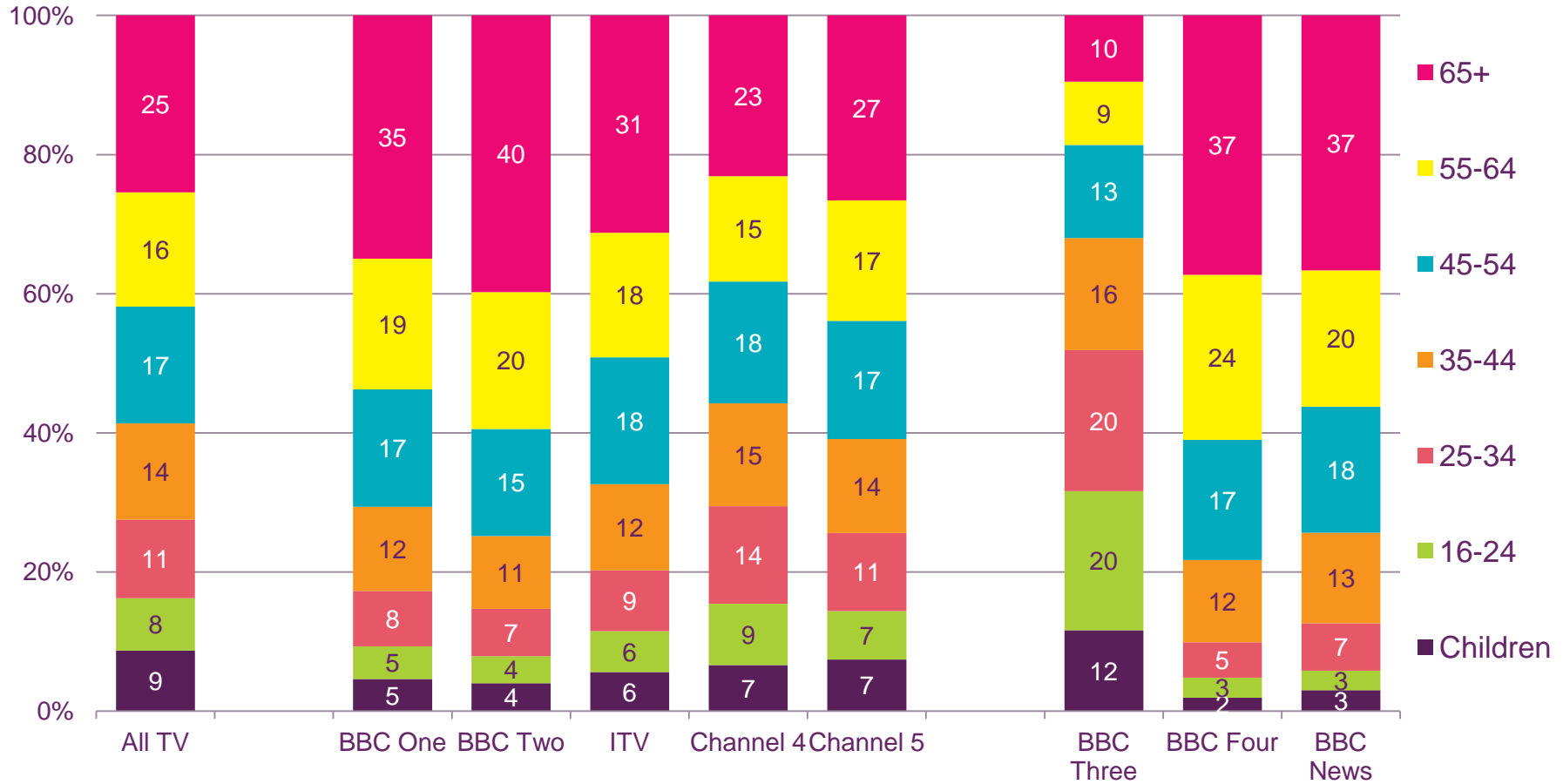
Summary: Audience profiles

- All of the main five PSB channels attracted viewers of varying ages with BBC One, BBC Two, BBC Four and BBC News attracting an older profile of viewers (those aged 55 or over account for over 50% of audiences) compared with the Total TV average (41%) (Figure 25).
- Channel 4 attracts a relatively younger audience, although its profile is similar to that of the Total TV average. The youngest audiences were found on BBC Three with those under 35 years of age representing just over half of its audience (Figure 25).
- While BBC One, BBC Two, BBC Four and BBC News are more likely to attract viewers aged 55 or over, they are also more likely to attract viewers in the ABC1 socio-economic group. Channel 4's socio-economic profile is identical to that of the Total TV average, while ITV and Channel 5 tend to attract a greater proportion of viewers from the C2DE group (Figure 26).
- When taken together we see that the main five PSB channels have an older age profile than the Total TV average and the portfolio channel groups tend to attract younger viewers. We saw that BBC Four and BBC News have an older profile, however the inclusion of BBC Three and BBC's children's channels results in an overall younger profile across the BBC portfolio channels. (Figure 27).
- The socio-economic portfolio of the main five PSB channels and the BBC portfolio channels is similar to the Total TV average. The profile of the commercial PSB portfolio channels is skewed towards DE viewers (Figure 28).

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

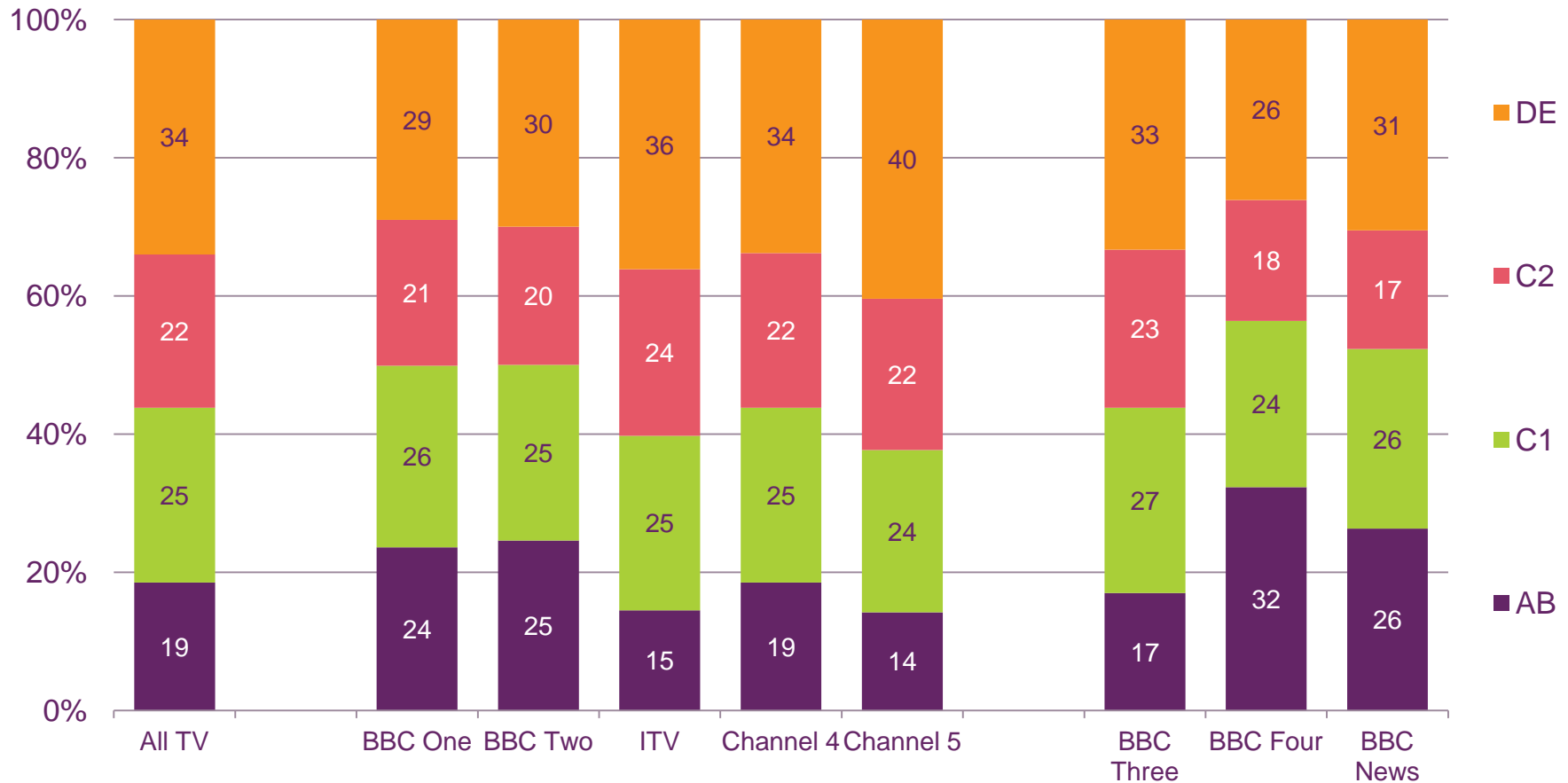


Fig 25 Age profile of channel viewers, 2012



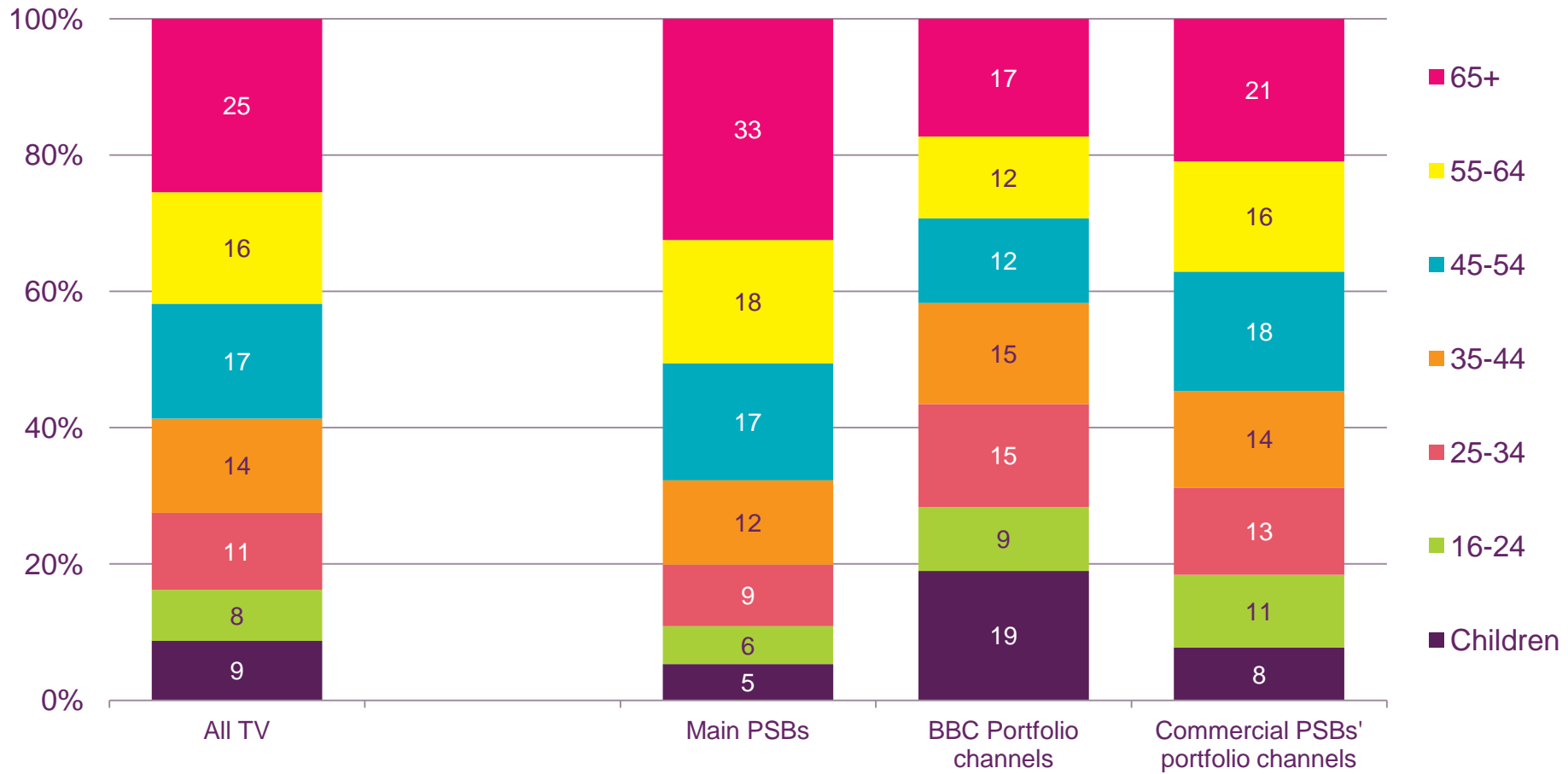
Source: BARB, All Individuals, Network. Profile data calculated on a base of All Individuals.
 -Due to low audience figures profiles have not been included for BBC HD and BBC Parliament.

Fig 26 Socio-economic profile of channel viewers, 2012



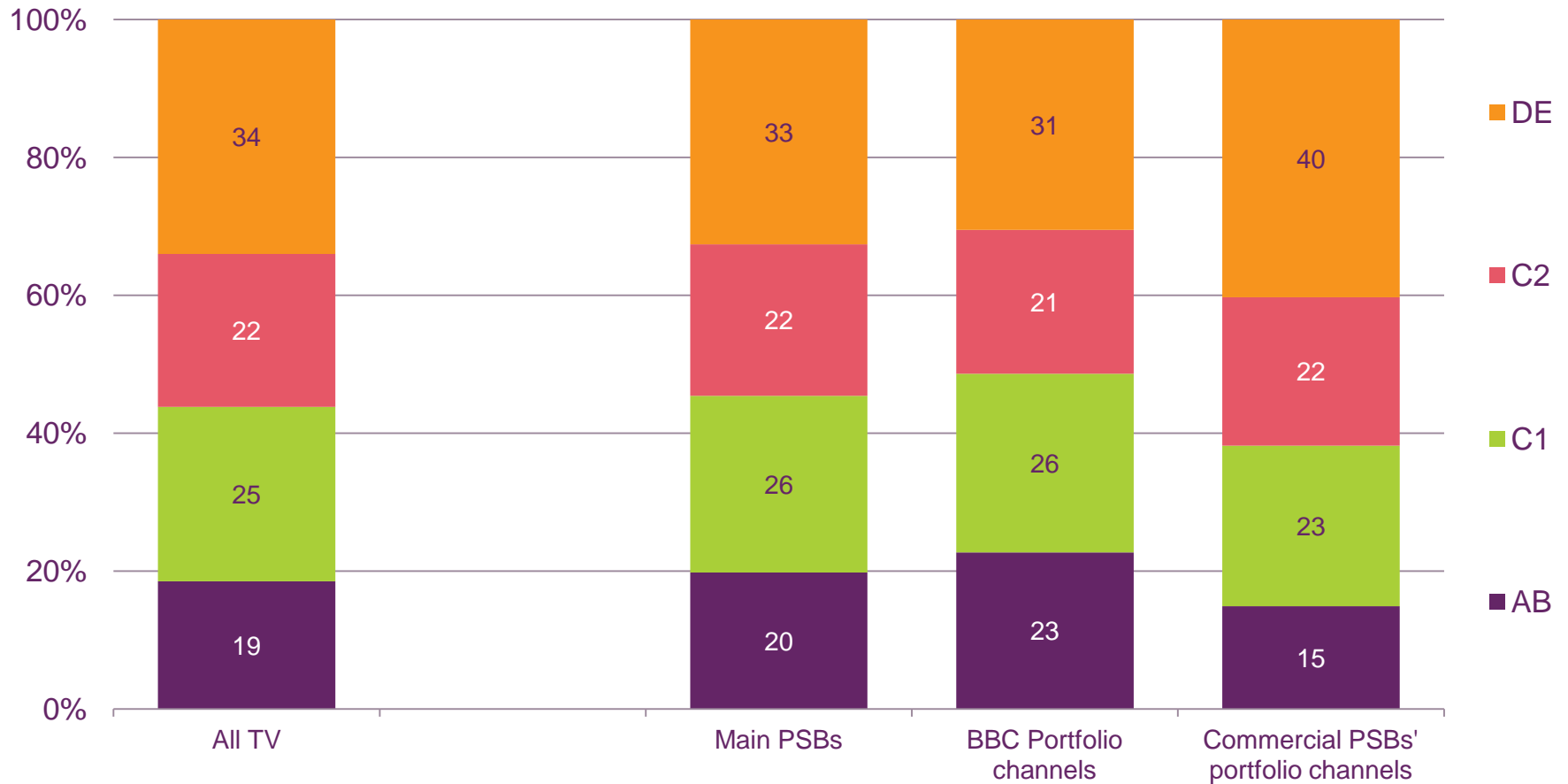
Source: BARB, All Individuals, Network. Profile data calculated on a base of All Individuals.
 -Due to low audience figures profiles have not been included for BBC HD and BBC Parliament.

Fig 27 Age profile of viewers by channel group, 2012



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

Fig 28 Socio-economic profile by channel group, 2012



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

Summary: Non-linear viewing via time-shifting

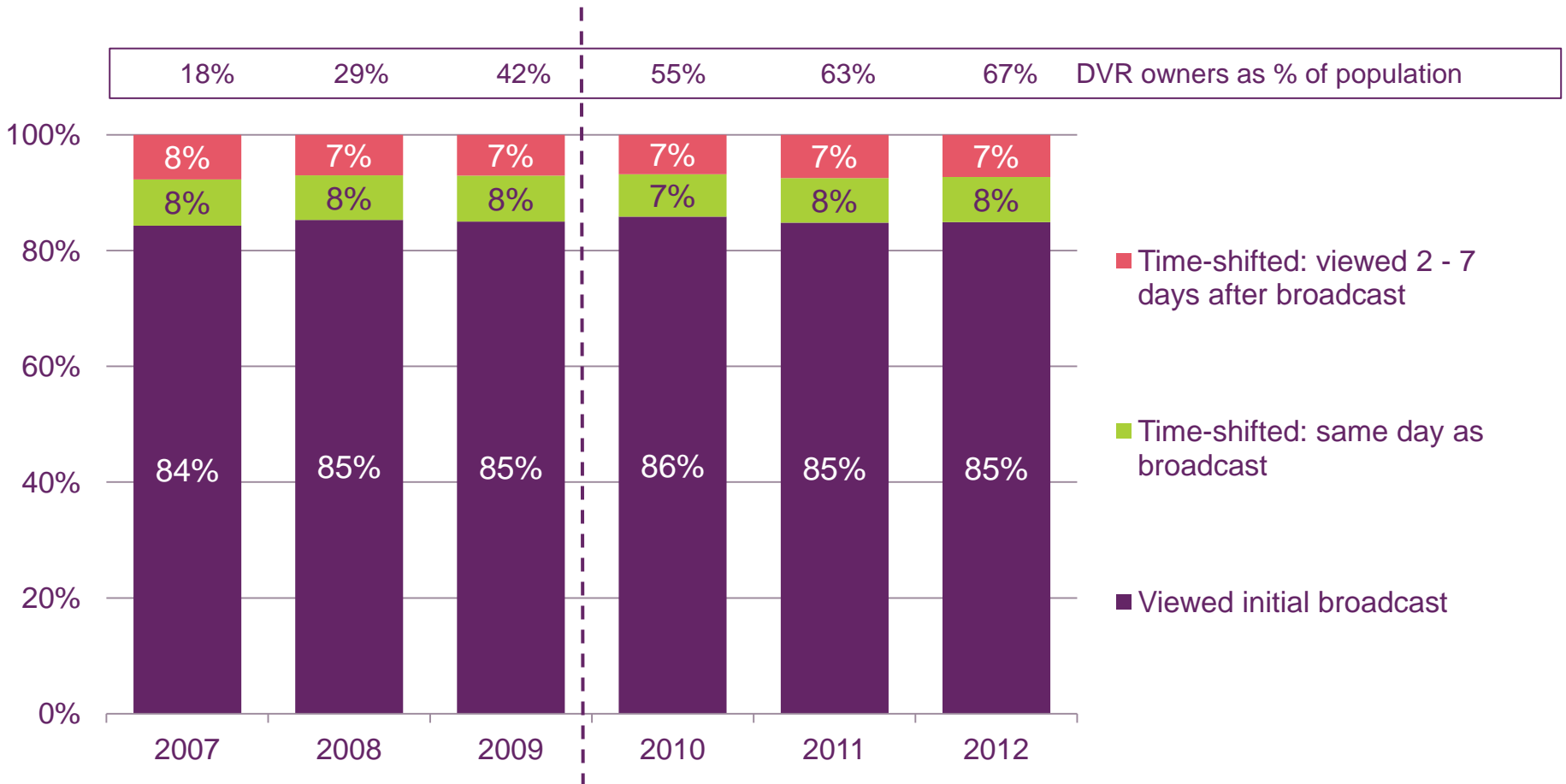
A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- This section looks at the proportion of viewing that was time-shifted in 2012 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. It also includes viewing to catch up TV services viewed through a TV set, where the content has been broadcast in the previous seven days. Viewing outside the seven day window is not measured, so it is likely reported time-shifted viewing is lower than in reality.
- The data present only looks at timeshifted viewing of the main channels through the use of a DVR – it does not include ‘timeshifted’ viewing which takes place on the ‘+1’ channel variants.
- BARB data suggests 67% of the UK population owned a DVR in 2012 and 15% of all their viewing to the main five PSB channels was time-shifted. This share has remained stable over the past few years even as DVR penetration has increased. There appears to be a 50:50 split in time-shifted viewing on the main five PSB channels between viewing on the same day and viewing 2-6 days after broadcast (Figure 29).
- Among individuals with DVRs the proportion of total time-shifted viewing to the main five PSB channels varies by channel with a greater proportion of Channel 4 and Channel 5 viewing take place after live transmission compared with BBC One, BBC Two and ITV.(Figure 30).
- The use of DVRs to time-shift viewing also varies across age group. Time-shifted viewing represented 23% of viewing among 25-34 year old DVR owners, compared with 11% of viewing among those DVR owners aged 65 or over. (Figure 31).
- Analysis of trends in time-shifted viewing by programme genre shows variation across the type of programming viewers watch. On the main five PSB channels, Drama (33% of viewing) and Soaps (28% of viewing) are most likely to be time-shifted. National News (3%), Sports (8%) and Current Affairs (8%) are least likely to be time-shifted – this is likely to be a result of the nature and immediacy of these genres. (Figure 32).

Non-linear viewing via time-shifting



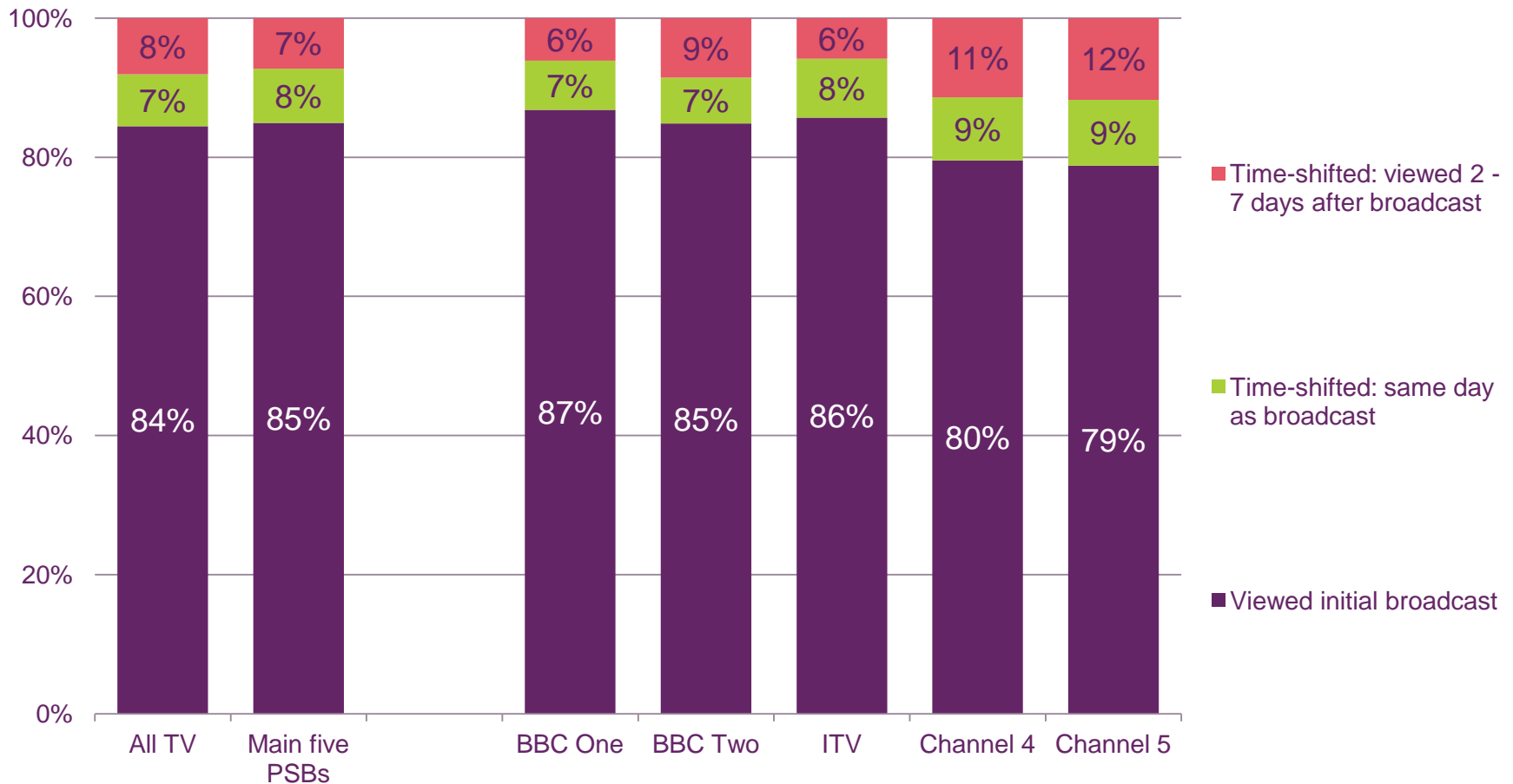
Fig 29 Proportion of live vs. time-shifted viewing - Main five PSB channels, 2007-2012



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).

Fig 30 Proportion of live vs. time-shifted viewing by channel - Main five PSB channels, 2012

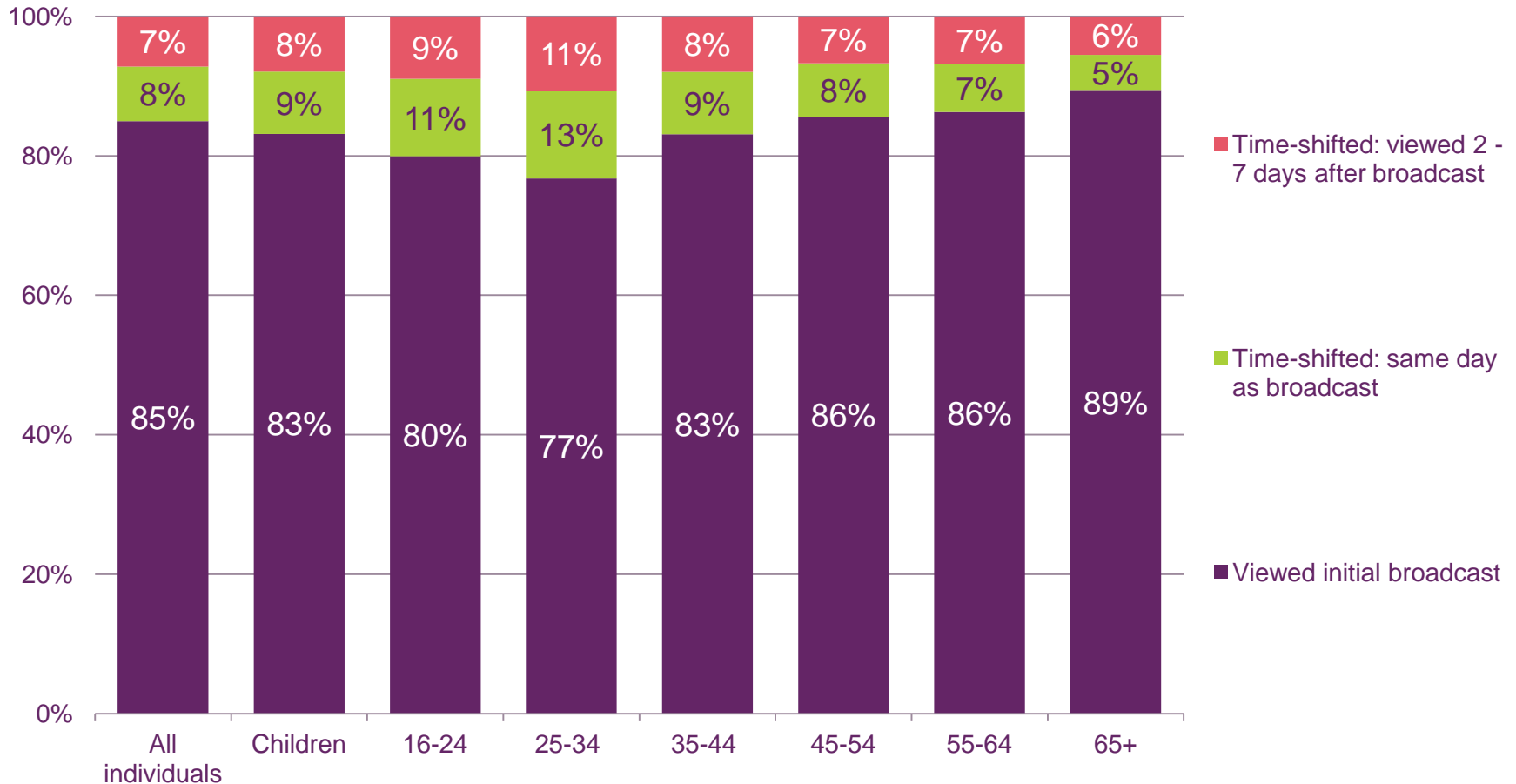


Source: BARB, All DVR owners, Network.
 -In 2012, 'DVR owners' represented 67% of the population

Non-linear viewing via time-shifting



Fig 31 Proportion of live vs. time-shifted viewing across the main five PSB channels by age group, 2012

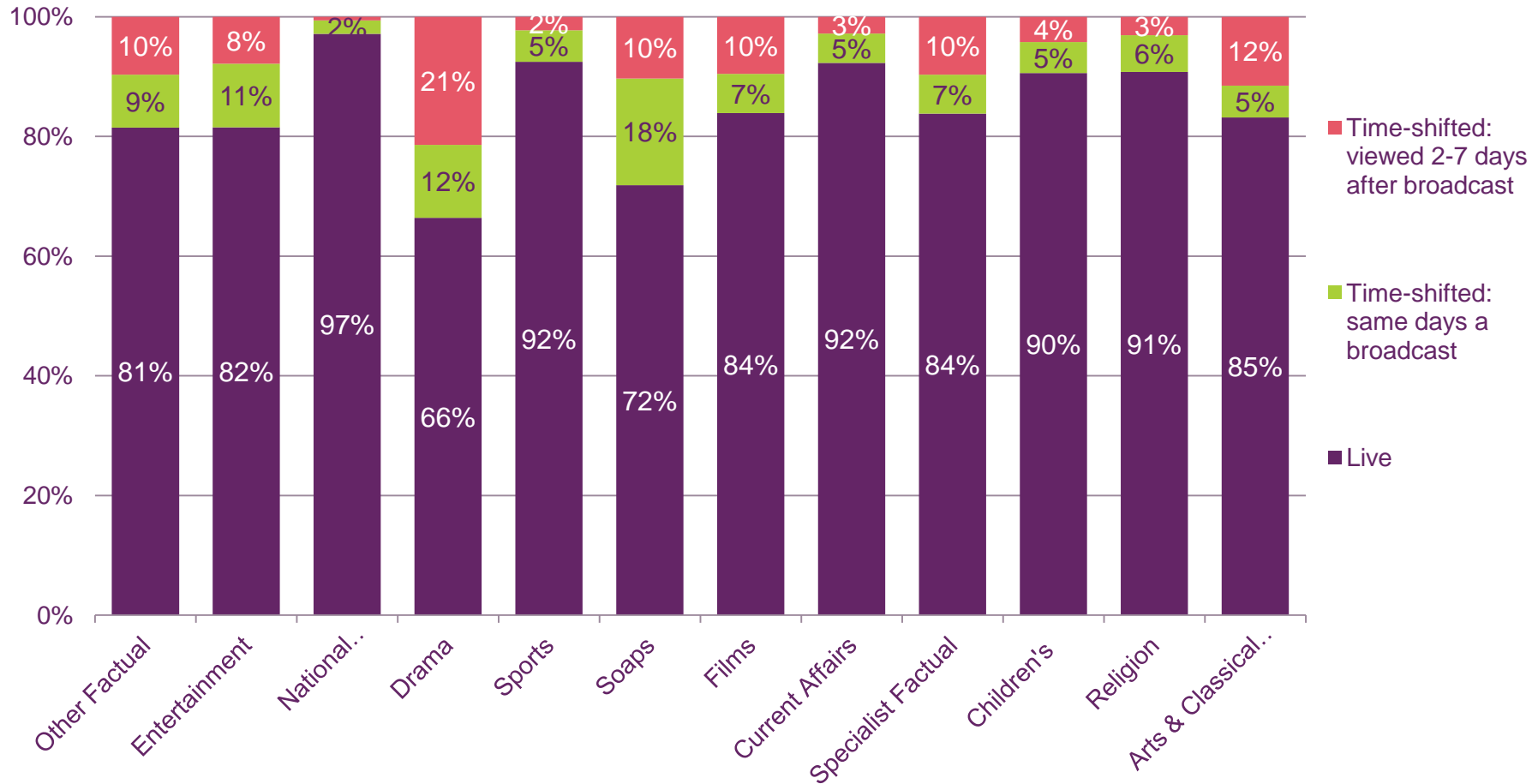


Source: BARB, All DVR owners by age group, Network.

Non-linear viewing via time-shifting



Fig 32 Proportion of live vs. time-shifted viewing across the main five PSB channels by genre, 2012



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

Viewing of range of programmes: over time

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.

- The breakdown in viewing to the main five PSB channels across the entire day shows that between 2007 and 2012 there was an increase in viewing to Entertainment (17% to 19%), Other Factual (16% to 17%) and Current Affairs (5% to 7%). The most notable increase was in the share of viewing accounted for by the Sports genre from 8% in 2007 to 13% in 2012. This increase is likely to have been a result of the interest across the UK in coverage of the London 2012 Olympics (Figure 33).
- Over the same period viewing to Drama (14% to 9%), Soaps (11% to 8%) and Films (9% to 7%) fell (Figure 33).
- Viewing to Entertainment programming also increased during peak time (16% to 19%) while viewing fell across Drama (20% to 14%), Other Factual (18% to 16%) and Soaps (17% to 14%). The proportion of peak time viewing accounted for by Sports programming doubled from 5% in 2007 to 10% in 2012. (Figure 34).

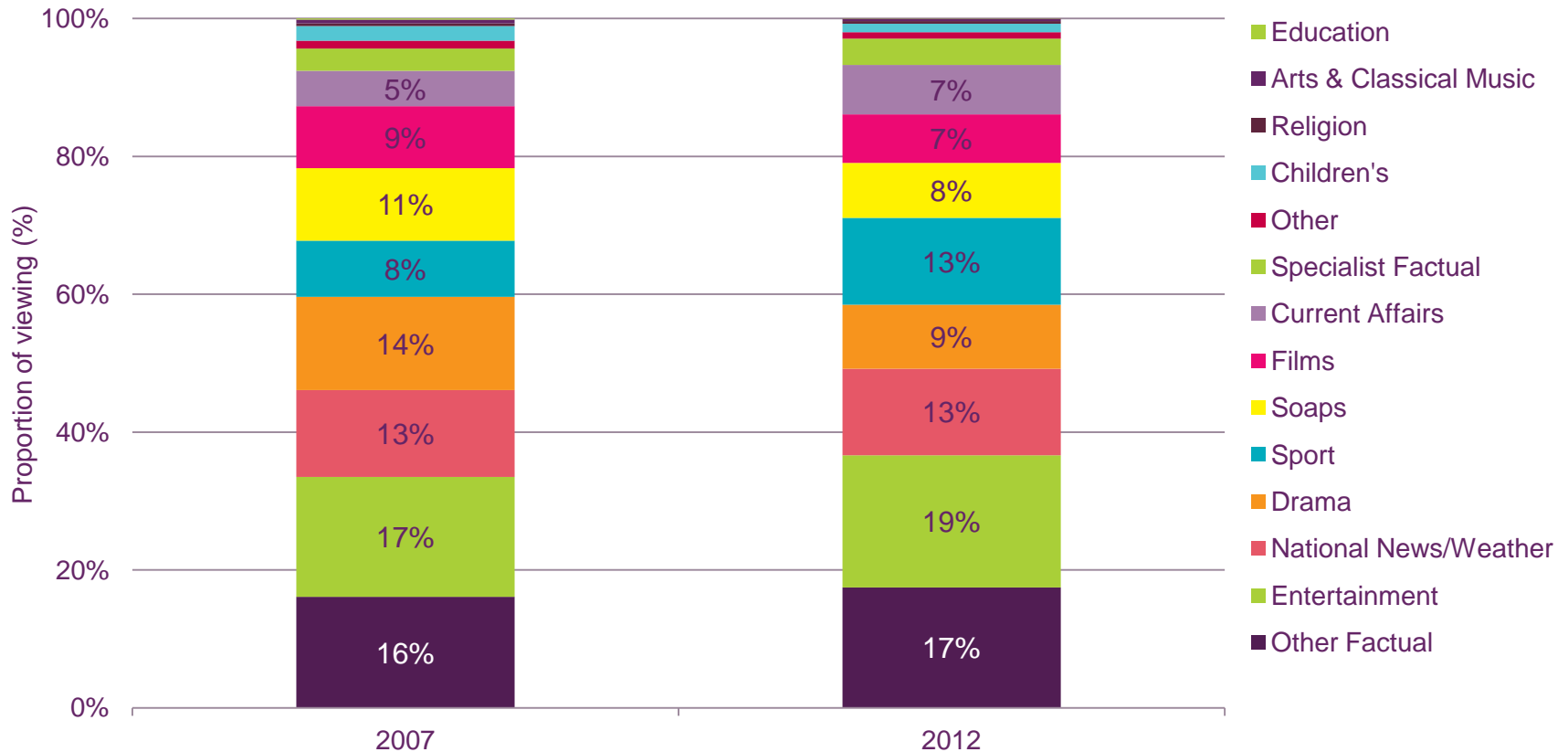
-Changes to the BARB reporting system in 2010 now allow broadcasters to retrospectively amend the genre labelling of broadcasts they have aired. These changes will apply to all historic data for respective programmes/films. The effect of this is analysis within this report is based on a snapshot of data at a given point in time (i.e. when analysis was conducted). All analysis is based as of January/February 2013.

-See *Definitions: All genres analysis*.

Viewing of range of programmes: over time



Fig 33 Proportion of viewing by genres on the main five PSB channels - All homes, 2007 vs. 2012

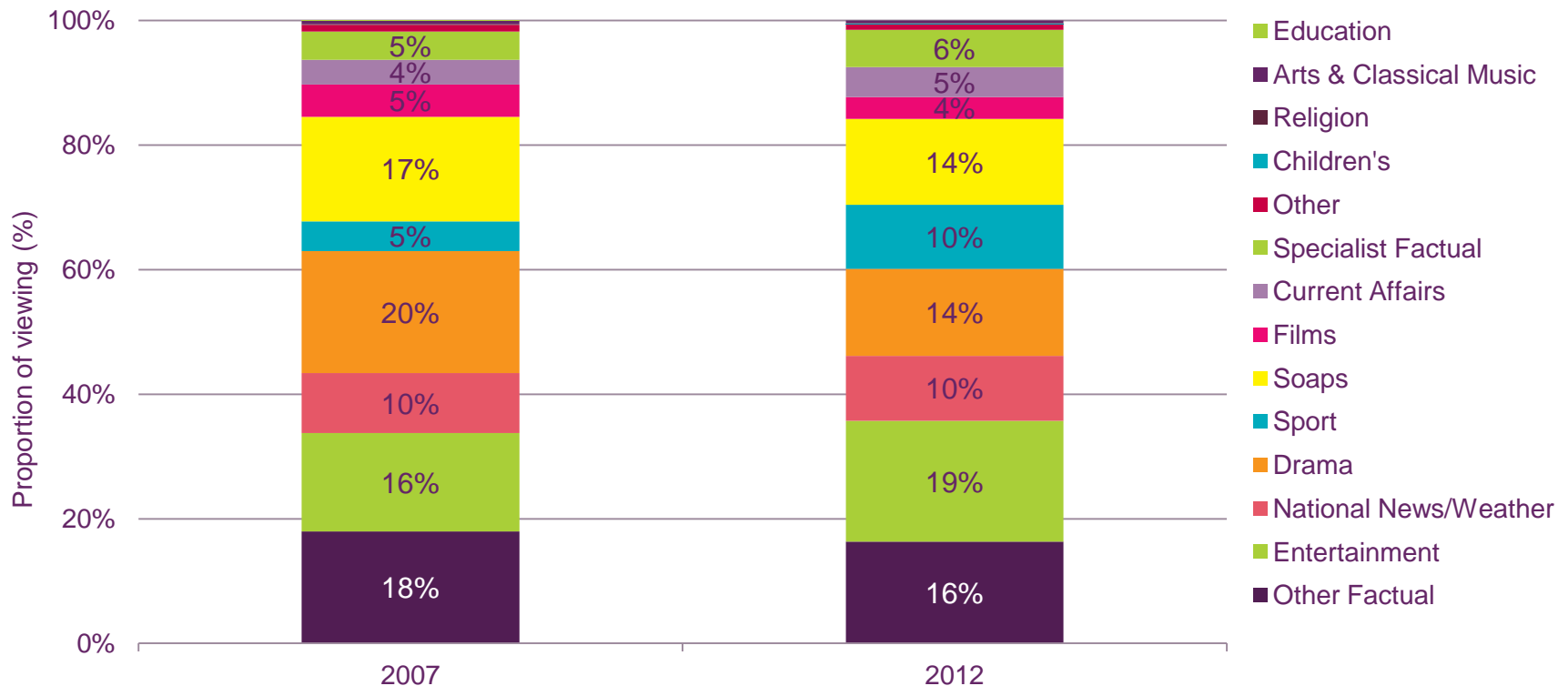


Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Viewing of range of programmes: over time



Fig 34 Proportion of viewing by genre on the main five PSB channels - All homes, 2007 vs. 2012, Peak time



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5). Peak time=18:00-22:30.

-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

- The profile of viewing across the day by programme genre varies across each of the main five PSB channels (Figure 35):
 - **BBC One:** National News/Weather accounted for 21% of viewing on the channel– the greatest proportion of viewing on BBC One and considerably higher than the 13% average across the main five PSB channels. Drama (11%) and Current Affairs (10%) also represented above-average shares of viewing on BBC One compared with the average across the five main PSB channels. Most noticeably in 2012, Sports programming accounted for 18% of viewing on BBC One, compared with the 13% average. This is likely to be a reflection of the coverage of the London 2012 Olympics across the Summer.
 - **BBC Two:** The most popular genre BBC Two in 2012 was Other Factual, representing 37% of viewing compared with 17% across the main five PSB channels. Specialist Factual (10%) programming also represented above-average viewing profiles on BBC Two when compared with the five main PSB channels combined.
 - **ITV:** The most popular genre on ITV in 2012 was Entertainment, accounting for 32% of viewing compared with the average across the main five PSB channels of 19%. Soaps (18%), Drama (10%) and Current Affairs (9%) were also more popular on ITV than across the main five PSB channels combined.
 - **Channel 4:** Other Factual (33%), Entertainment (27%) and Films (15%) accounted for the majority of viewing on Channel 4 in 2012.
 - **Channel 5:** Films (29%), Other Factual (21%) and Drama (17%) represented above-average shares of viewing on the channel when compared with the main five PSB channels combined, accounting for two-thirds of viewing to the channel.

Summary: Viewing of range of programmes, by channel



- Figure 36 shows the proportion of viewing represented by different genres on each of the main five PSB channels in 2012 during peak time (18:00-22:30):
 - **BBC One:** As the most popular genre on the channel, Drama accounted for 18% of peak time viewing on BBC One compared with 11% across the whole day and 14% across all five main PSB channels combined. This was followed by National News (16%) and Sports programming (15%) with both genres representing higher shares of viewing than any of the other main five PSB channels.
 - **BBC Two:** Similar to trends across the entire day, Other Factual (41%) , Entertainment (22%) and Specialist Factual (17%) were the most popular genre on BBC Two during peak time, with each genre accounting for above-average shares compared with the main five PSB channels combined.
 - **ITV:** Soaps (30%) and Entertainment (29%) dominated peak time viewing on ITV, accounting for the highest proportions compared with each of the other five main PSB channels.
 - **Channel 4:** Other Factual (36%), Entertainment (21%) and Films (10%) accounted for the majority of peak time viewing on Channel 4 in 2012.
 - **Channel 5:** As with trends across the whole day, Other Factual (35%), Drama (26%) and Films (19%) dominated peak time viewing on Channel 5, accounting for 80% of viewing.

Summary: Viewing of range of programmes, by channel



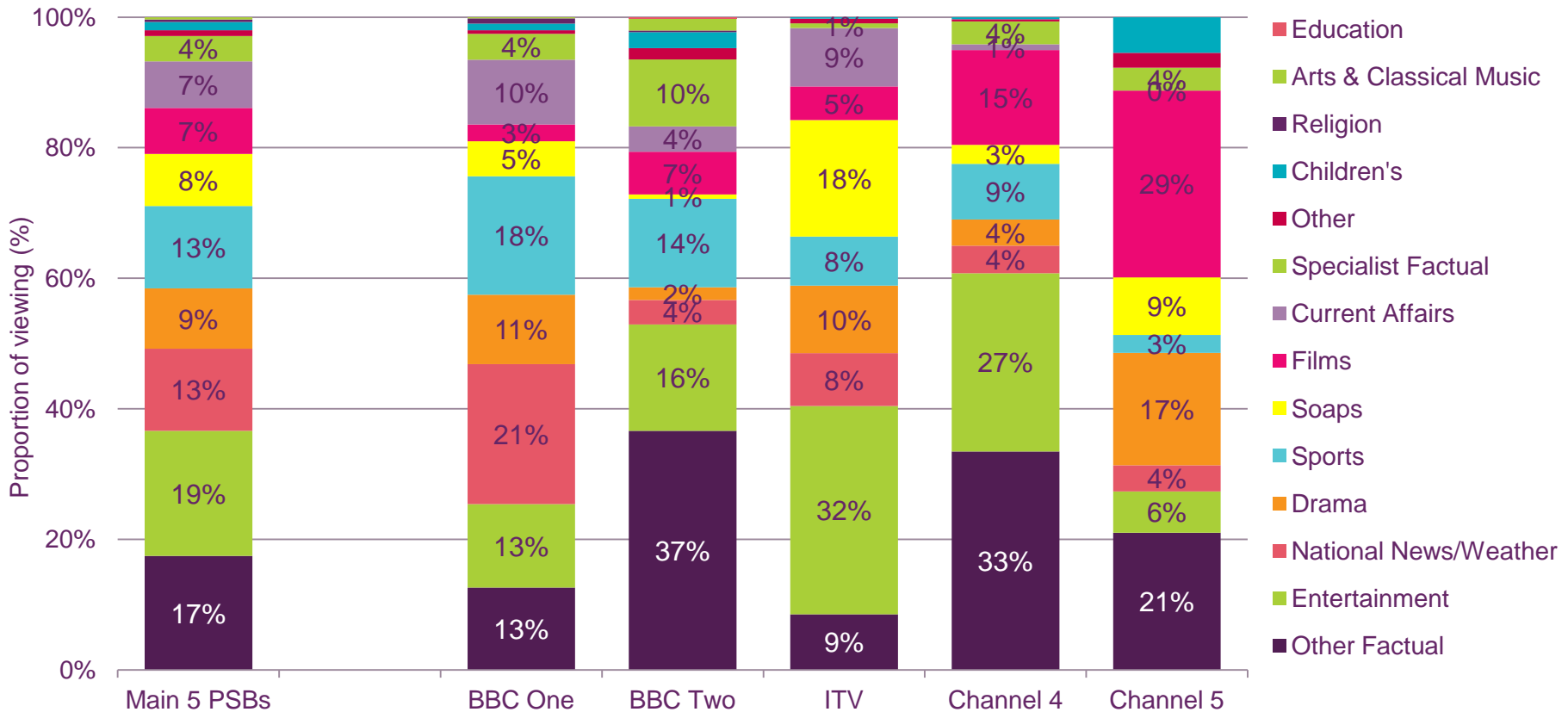
- Further analysis of the breakdown in viewing by genre in comparison with output* data helps put the key trends into context against the type of programming shown on each channel (Figures 37 & 38).
 - **BBC One:** Across the day, Other Factual (17% output, 13% viewing) and National News (29% output, 21% viewing) accounted for lower shares of viewing than output. Other genres where similar trends were noted were Films, Current Affairs, Specialist Factual and Children's programming. Entertainment, Drama and Soaps were all relatively more popular on the channel, accounting for greater shares of viewing than output. With extensive coverage of the London 2012 Olympics, Sports programming accounted for 11% of BBC One's output and 18% of viewing.
 - **BBC Two:** The most viewed genres across the entire day on BBC Two; Other Factual, Entertainment, Sports and Specialist Factual all represented a greater proportion of viewing compared with output.
 - **ITV:** Entertainment (24% output, 32% viewing), Soaps (3% output, 18% viewing), Drama (7% output, 10% viewing) and Sports (5% output, 8% viewing) all performed relatively well in terms of viewing compared with output. National News (17% output, 8% viewing) and Current Affairs (15% output, 9% viewing) performed less well on ITV.
 - **Channel 4:** Other Factual programming (26% output, 33% viewing) performed well in terms of viewing share versus output share. Most other genres accounted for similar shares of viewing as output.
 - **Channel 5:** Across the entire day, Drama represented 17% of viewing compared with 10% of output and Films accounted for 20% of output and 29% of viewing. In contrast, Children's programming represented 21% of output and 5% of viewing.

*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 D which are based on different programme classifications.

Viewing of range of programmes: by channel



Fig 35 Proportion of viewing by genre by channel – Main five PSB channels, 2012

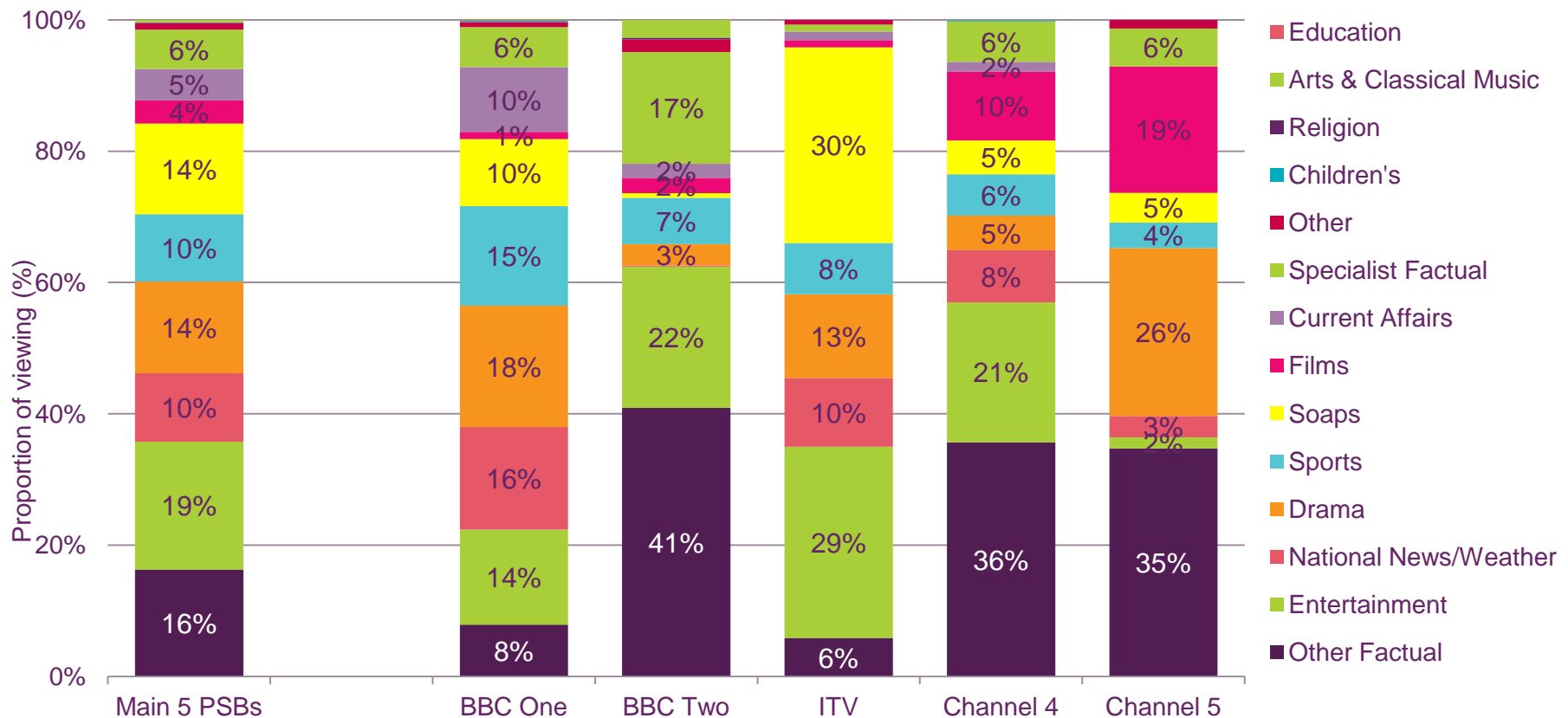


Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.

Viewing of range of programmes: by channel



Fig 36 Proportion of viewing by genre by channel - Main five PSB channels, Peak time, 2012

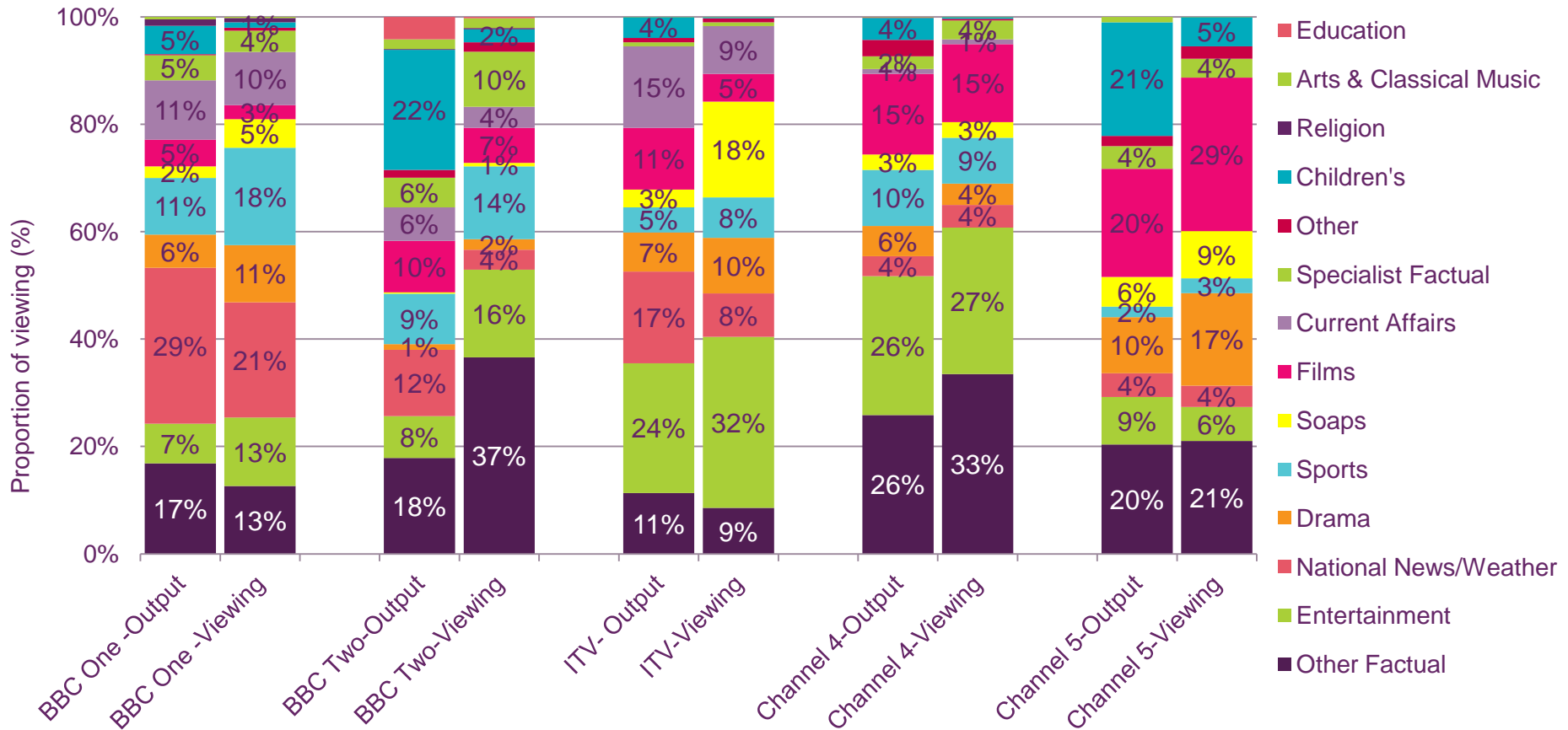


Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5). Peak time=18:00-22:30. -Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.

Viewing of range of programmes: by channel



Fig 37 Proportion of viewing by genre versus output range – Main five PSB channels, 2012

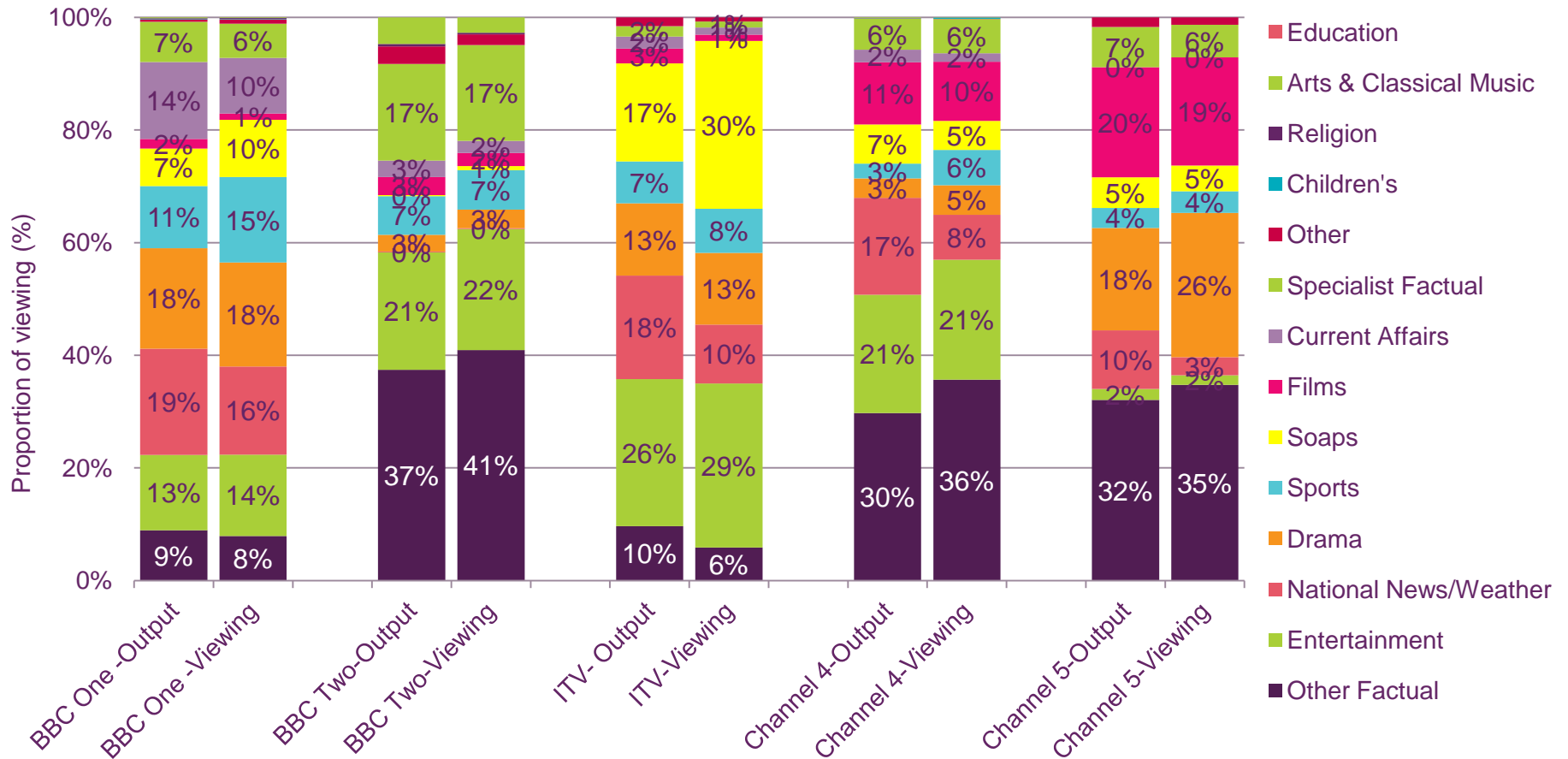


Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.

Viewing of range of programmes: by channel



Fig 38 Proportion of viewing by genre versus output range – Main five PSB channels, Peak time, 2012



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5). Peak time=18:00-22:30. -Network viewing-excludes nations/regions programmes. See *Definitions: All genres analysis*.

Viewing of range of programmes

Summary of viewing to the main five PSB channels by genre, 2007 vs. 2012



<u>Genre</u>	Total hours (rounded) viewed per year per individual (4+) to the main five PSB channels	
	<u>2007</u>	<u>2012</u>
Other Factual	116	116
Specialist Factual	23	26
Arts & Classical Music	4	2
Education	1	0 (0.2)
Religious	3	3
UK Drama	74	50
UK Soaps	65	48
Sport	59	83
UK Sitcom	8	7
National News	90	82
Current Affairs	37	47

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 January/February 2013.

Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -Network viewing-excludes nations/regions programmes. 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.

Top programmes on the main five PSB channels by genre, 2012

<u>Genre</u>	<u>Programme</u>	<u>Channel</u>	<u>Date of first broadcast (2012)</u>	<u>Average audience (000s)</u>
Other Factual	The Apprentice	BBC One	11 April	8,054
Specialist Factual	Countryfile	BBC One	25 November	7,750
Arts & Classical Music	Rolf Paints the Diamond Jubilee	BBC One	5 June	4,301
Education	Britain Ad: King Arthur's Britain	Channel 4	2 February	121
Religious	Royal British Legion Festival of Remembrance	BBC One	10 November	5,103
UK Drama	Downton Abbey	ITV	4 November	11,767
UK Soaps	Coronation Street	ITV	23 January	12,198
Sport	Olympics 2012: Closing Ceremony	BBC One	12 August	24,465
UK Sitcom	Mrs Brown's Boys	BBC One	24 December	11,686
National News	BBC News	BBC One	4 June	10,743
Current Affairs	The Diamond Jubilee Thames Pageant	BBC One	3 June	10,473

Source: BARB, All individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5). Figures for ITV include ITV 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 January/February 2013.

-See *Definitions: PSB genre analysis*.

Summary: Factual, Arts & Classical Music, Education and Religion; 2007 vs. 2012



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 2007 and 2012, viewing to **Other Factual** programming on the main five PSB remained stable at 116 hours per individual per year. Across the two periods viewing increased on BBC One and Channel 5 while ITV and Channel 4 saw a fall in viewing (Figure 39).
- Viewing to **Specialist Factual** programming increased marginally between 2007 and 2012 from 23 hours to 26 hours. The BBC channels account for the majority of viewing to this genre and while viewing fell on BBC Two, viewing increased on BBC One (Figure 39).
- Viewing to Arts & Classical Music, Education and Religious programming on the main five PSB channels declined in 2012 compared with 2007 levels (Figures 40-42):
 - **Arts & Classical Music:** Fell from 4.0 in 2007 to 2.1 hours in 2012, with the BBC channels providing this programming.
 - **Education:** Decreased from 1.1 to 0.2 hours in 2012, driven by the decline on both key channels, BBC Two and Channel 4.
 - **Religious:** Fell marginally from 2.8 in 2007 to 2.6 hours in 2012. While viewing remained static on BBC channels this decline was a result of a fall in viewing on ITV and Channel 4.
- Across **all channels**, while the main five PSB channels continue to account for the majority of viewing to each of these genres, the proportion of total viewing to Other Factual, Specialist Factual and Arts & Classical Music fell across these channels – although at the same time viewing tended to increase on the portfolio channels. Between 2007 and 2012 there was an increase in the proportion of Arts & Classical Music viewing represented by the *Other multichannels* from 5% to 19% (Figure 43).

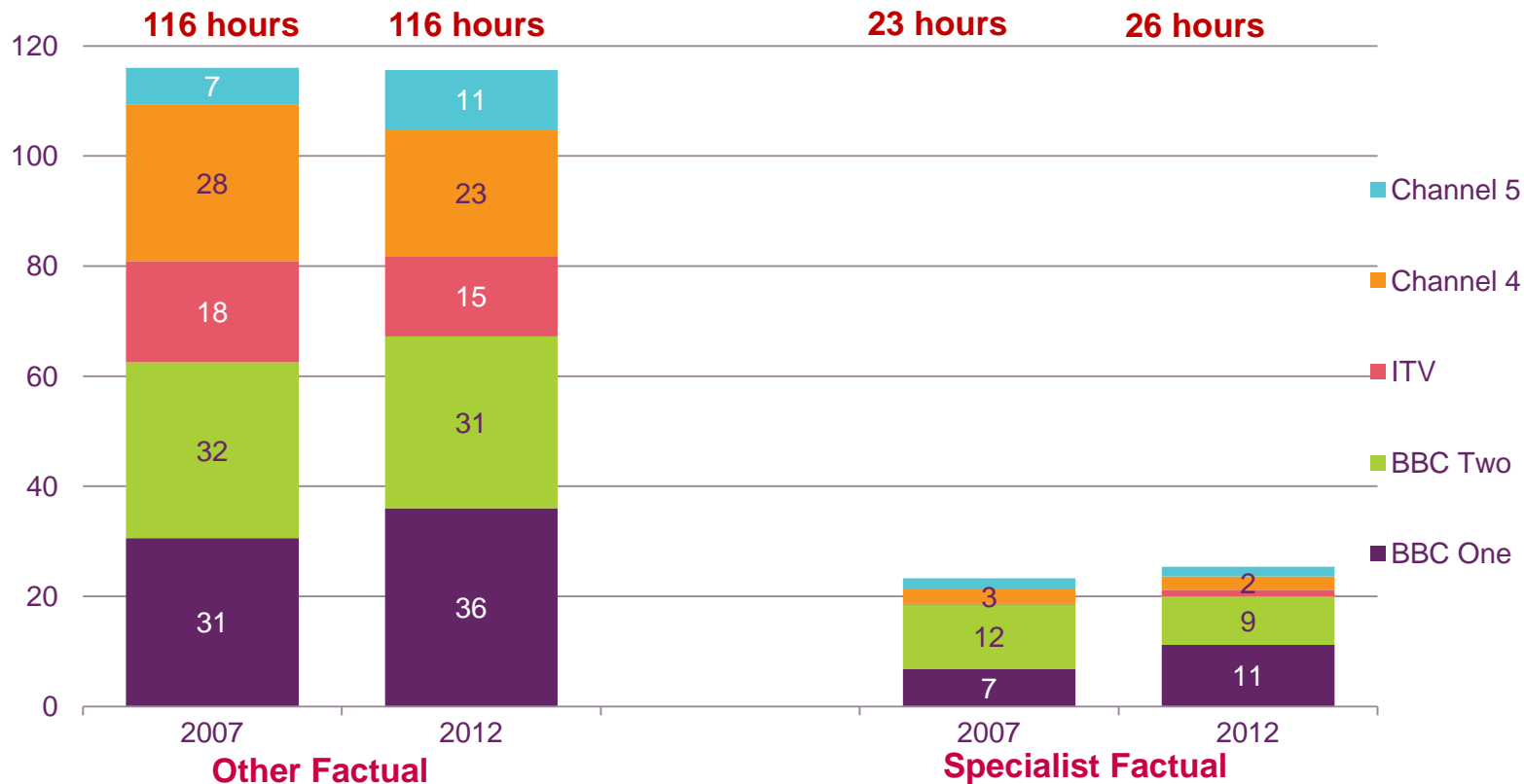
-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of January/February 2013.

Factual, Arts & Classical Music, Education and Religion,



Fig 39 Total viewing of Other and Specialist Factual – Main five PSB channels, 2007 vs. 2012

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



Source: BARB, All Individuals., Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).

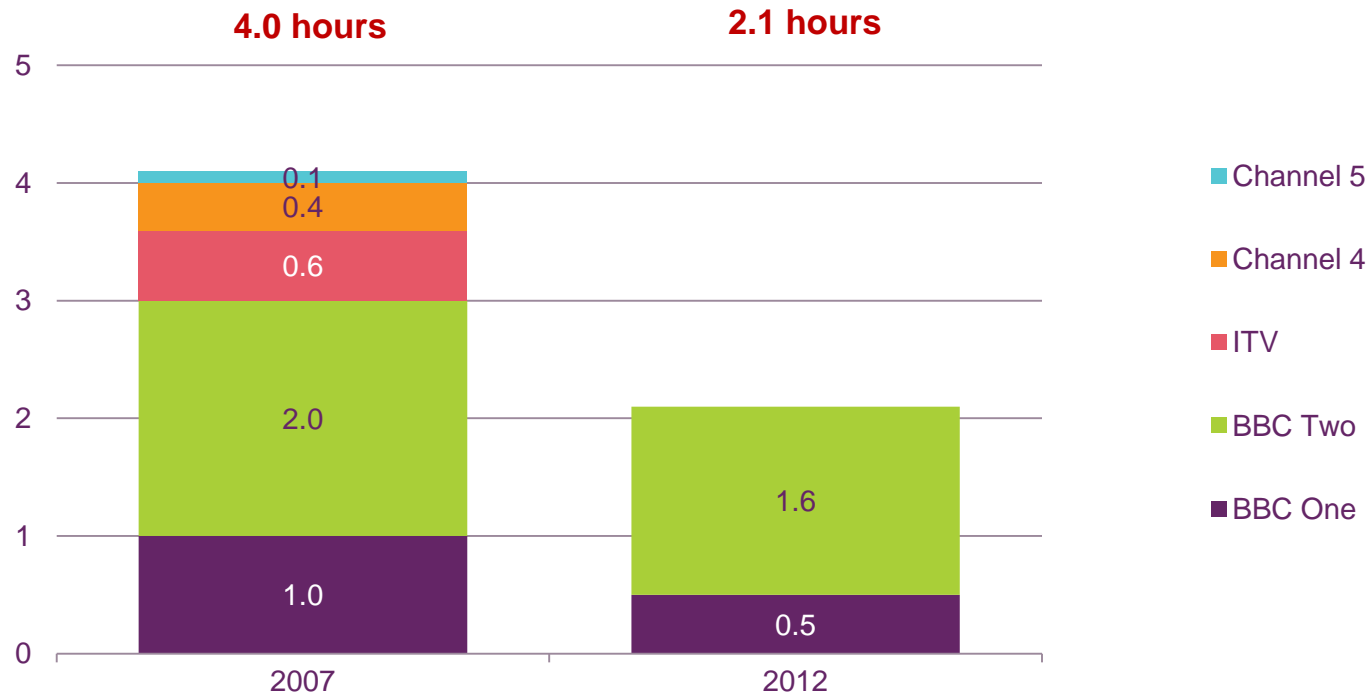
-Other Factual = Hobbies & Leisure(All), Documentaries – Human Interest; Factual Entertainment; Crime/Real Life; Travel; Fly on the Wall; Misc; Celebrity

-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 40 Total hours of viewing of Arts & Classical Music – Main five PSB channels, 2007 vs. 2012

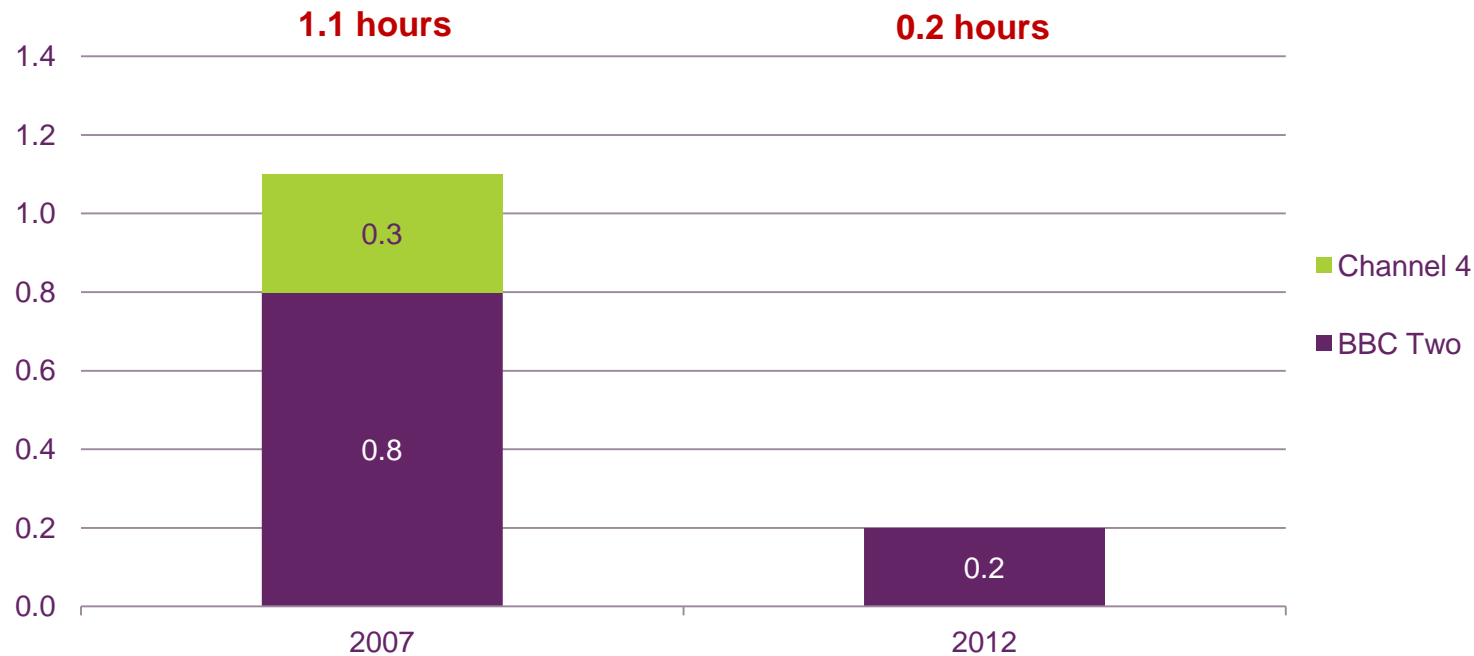
Total hours per year watched by average individual (4+)



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -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 41 Total hours of viewing of Education – Main five PSB channels, 2007 vs. 2012

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



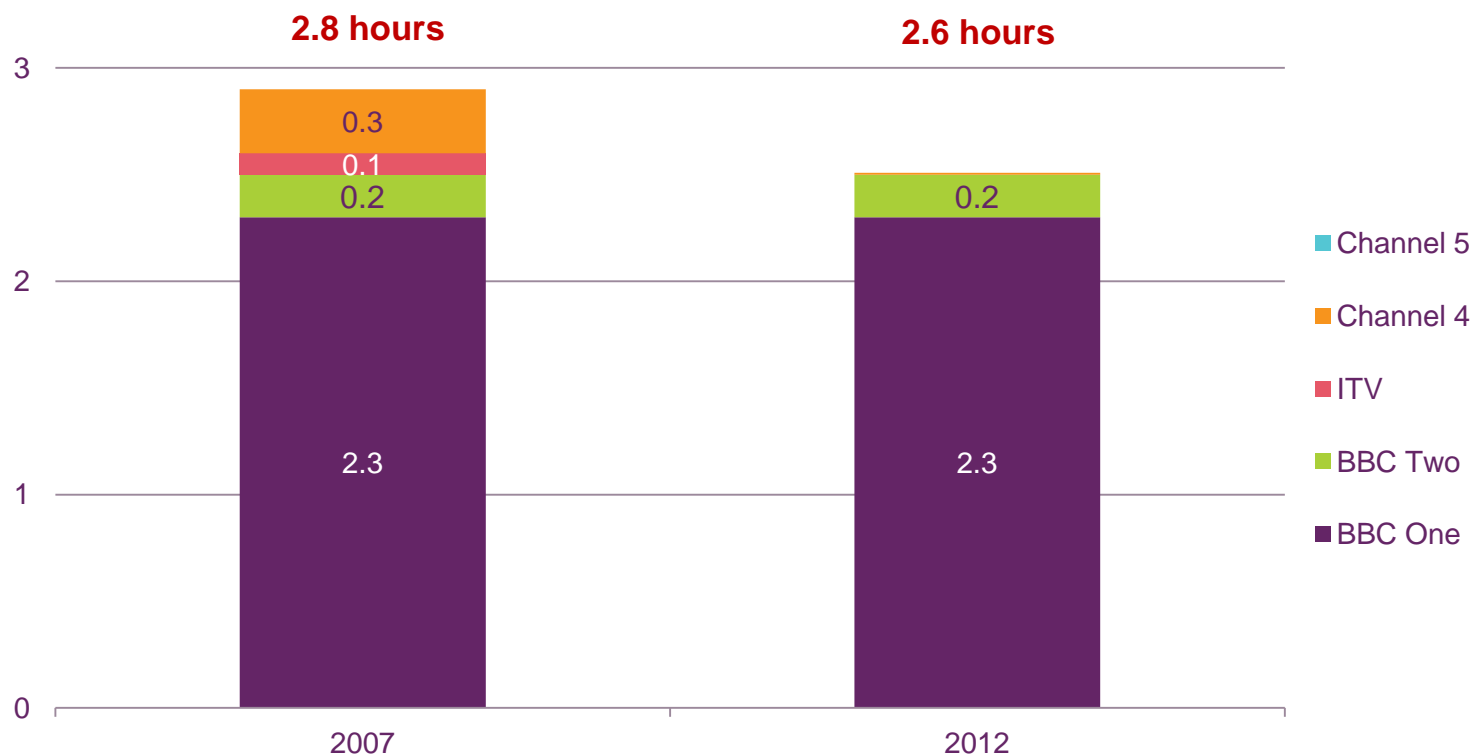
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
-Based on total minutes of viewing of 'Education'. See *Definitions: PSB genres analysis*.
-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Factual, Arts & Classical Music, Education and Religion,



Fig 42 Total hours of viewing of Religious programmes Main five PSB channels, 2007 vs. 2012

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



Source: BARB, Network, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).

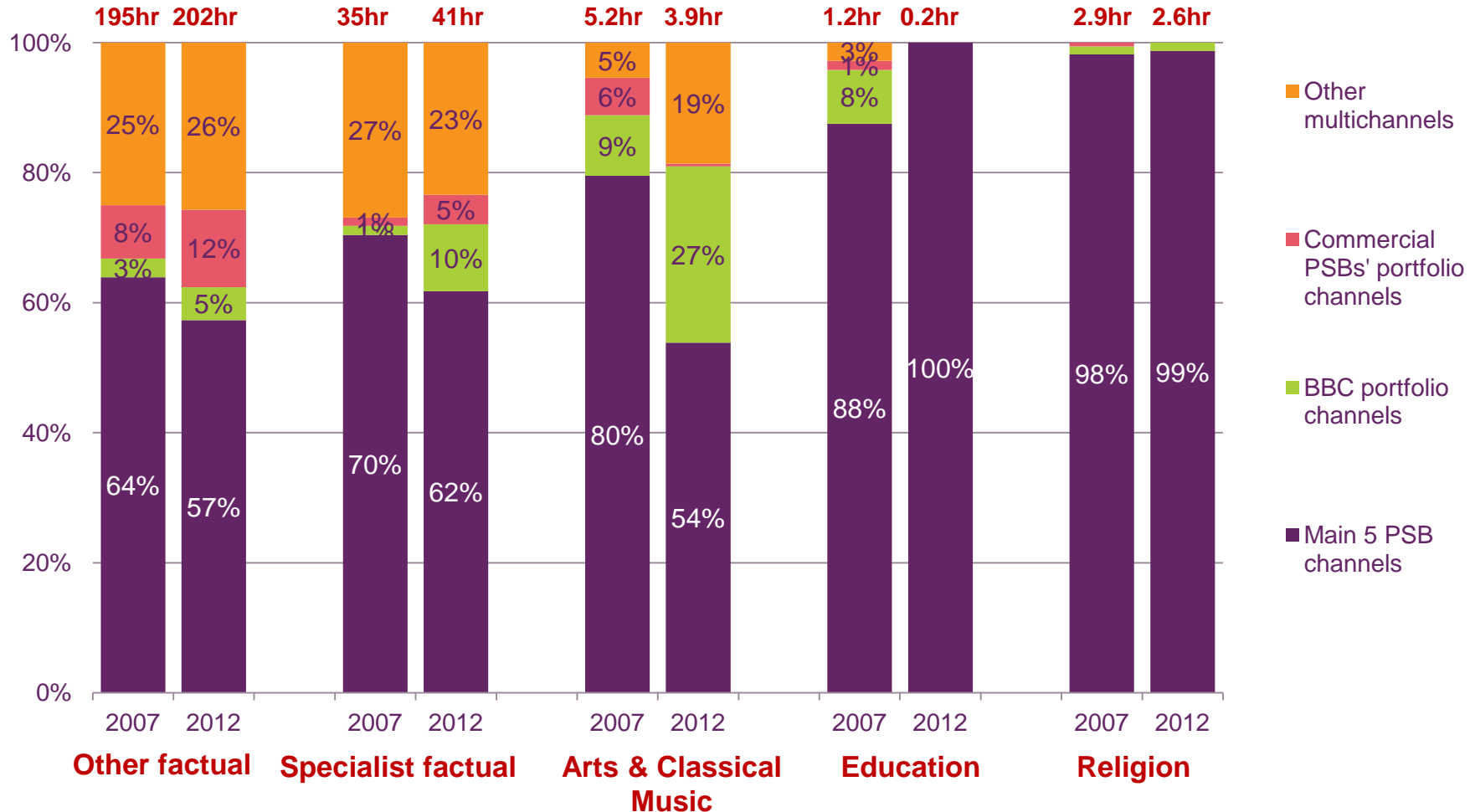
-Based on total minutes of viewing of 'Religious'.

-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 43 Share of viewing to genres by channel groups, 2007 vs. 2012



Source: BARB, All Individuals, 2007:Network Plus, 2012 Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -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; 2007 vs. 2012



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.

- Viewing to **UK Drama** across the main five PSB channels fell from 74 hours per individual in 2007 to 50 hours in 2012. There was a decline across both the key channels for this genre, BBC One and ITV (Figure 44).
- Viewing to **UK Soaps** across the main five PSB channels also fell, from 65 hours in 2007 to 48 hours in 2012. While ITV continues to dominate viewing across this genre, the channel saw a 10 hour fall in viewing between the two periods. There were smaller drops in viewing on BBC One and Channel 4 (Figure 44).
- Viewing to **UK Situation Comedy** remained stable between 2007 (7.6 hours per individual) and 2012 (7.4 hours per individual). While viewing fell across BBC One there was an increase on BBC Two and ITV (Figure 45).
- Given the increased coverage of sporting events in 2012, predominantly as a result of the London 2012 Olympics, there was a considerable increase in viewing to **Sports** programming. Viewing increased from 59 hours in 2007 to 83 hours in 2012. This increase was driven by the significant increase in viewing on BBC One from 24 hours to 52 hours (Figure 46).
- Across **all channels** we see that while the main five PSB channels continue to dominate across UK Drama and UK Soaps, there has been a decline in the viewing accounted for by these channels – although this has been balanced with a corresponding increase across the portfolio channels. Viewing to UK Situation Comedy is lower across the main five PSB channels, with *Other multichannels* accounting for an increasing share of viewing across this genre. In 2012, viewing to sports programming increased on the main five PSB channels from 60 to 62% while the share represented by *Other multichannels* fell from 38% to 28% (Figure 47).

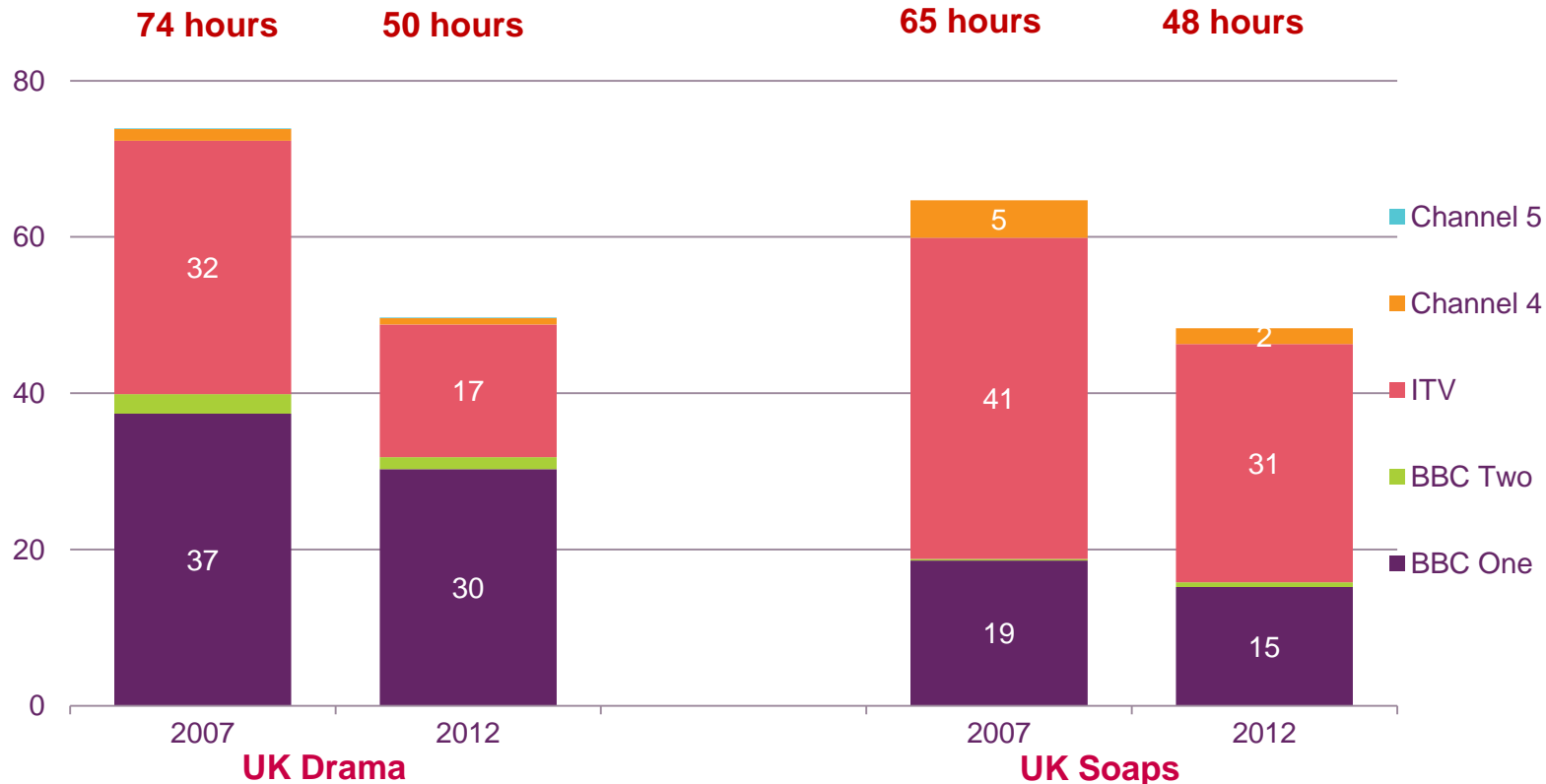
-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of January/February 2013.

UK Drama, UK Soaps, UK Situation Comedy and Sport



**Fig 44 Total viewing hours of UK Drama and UK Soaps
Main five PSB channels, 2007 vs. 2012**

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



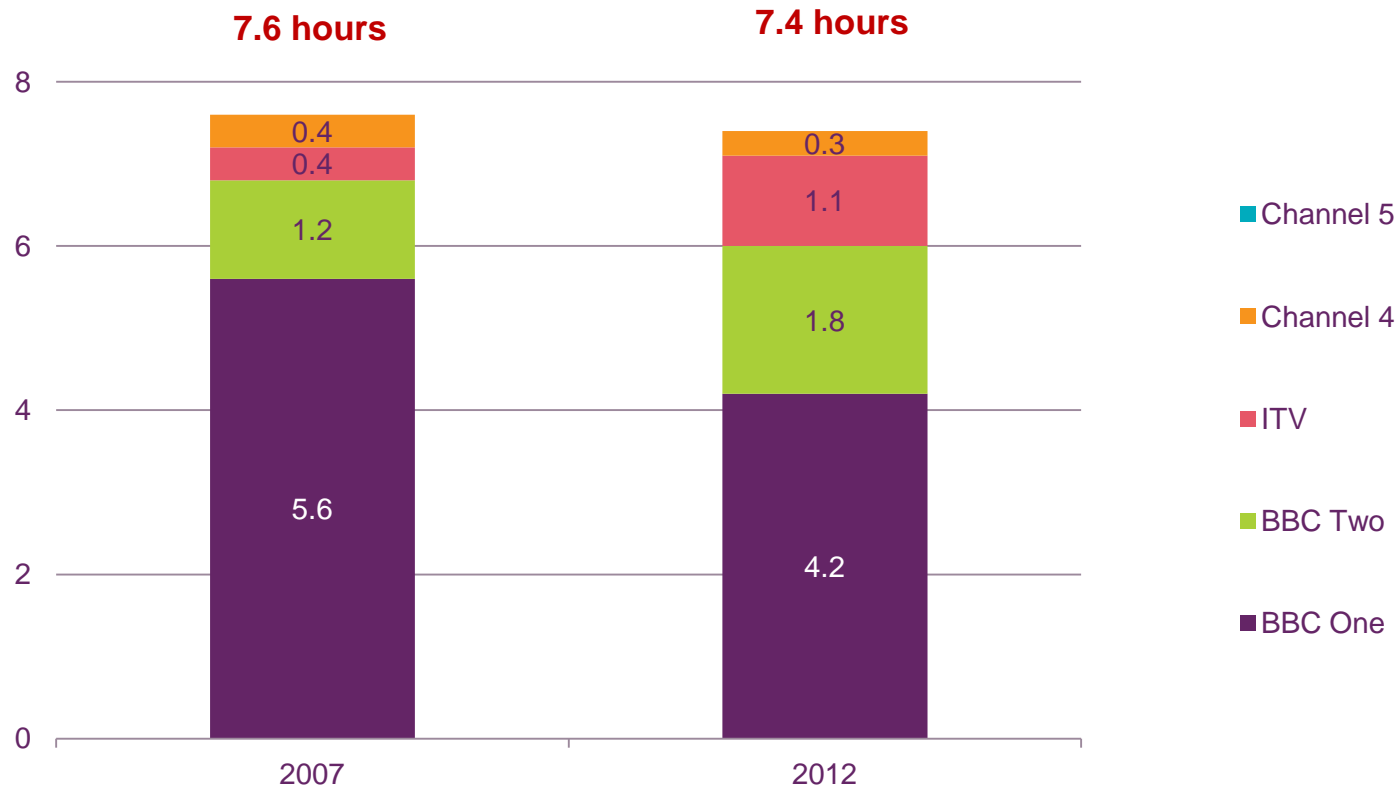
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -UK Drama= 'Drama: Single Plays'-UK + 'Drama: Series/Serials-UK' - UK Soaps= 'Drama: Soaps-UK'. See *Definitions: PSB genres analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

UK Drama, UK Soaps, UK Situation Comedy and Sport



Fig 45 Total viewing hours of UK Situation Comedy - Main five PSB channels, 2007 vs. 2012

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



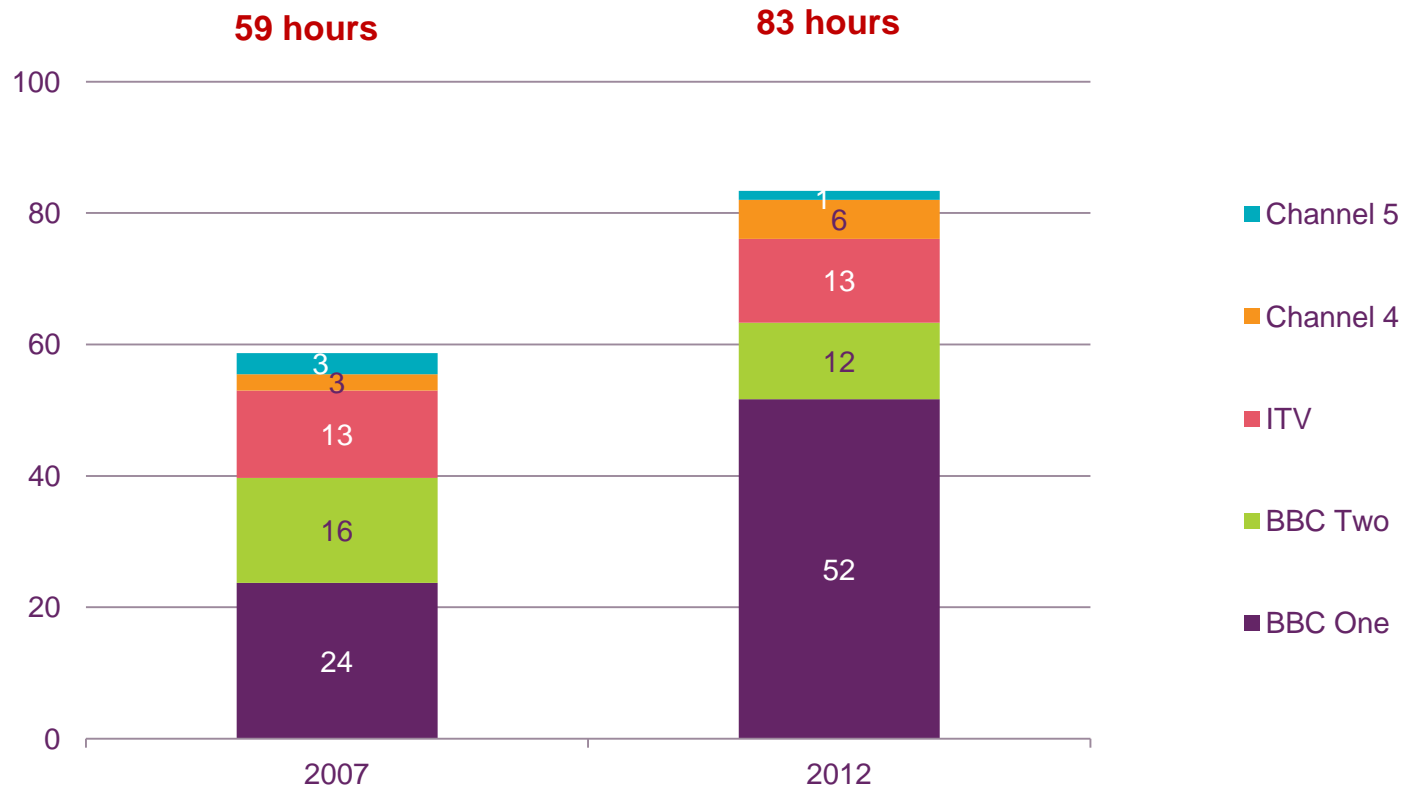
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
-Based on total minutes of viewing of 'Entertainment: Situation Comedy-UK'. See *Definitions: PSB genres analysis*.
-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

UK Drama, UK Soaps, UK Situation Comedy and Sport



Fig 46 Total viewing hours of Sports - Main five PSB channels, 2007 vs. 2012

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

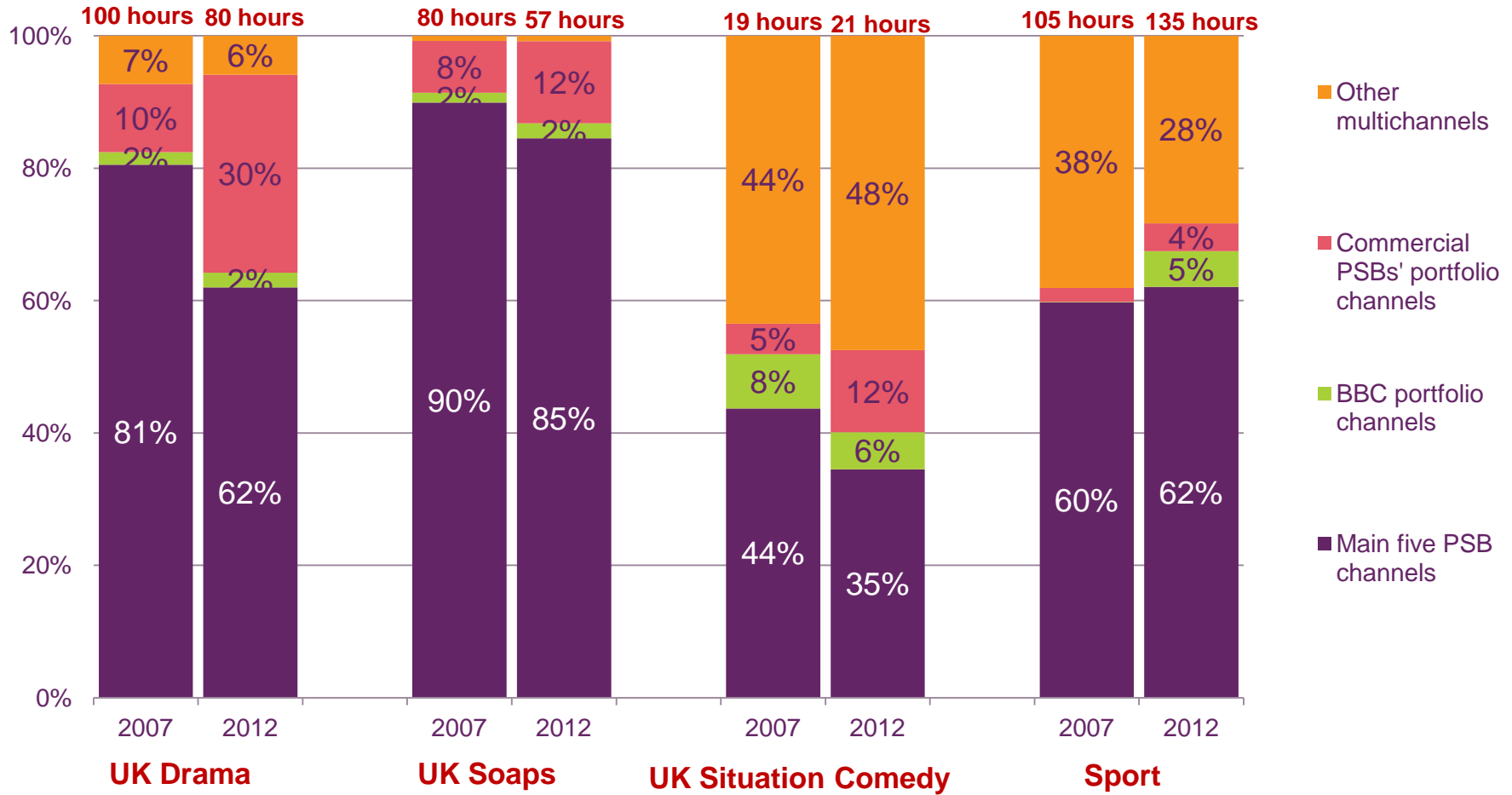


Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
-Based on total minutes of viewing of 'Sport'. See *Definitions: PSB genres analysis*.
-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

UK Drama, UK Soaps, UK Situation Comedy and Sport



Fig 47 Share of viewing to genres by channel groups, 2007 vs. 2012



Source: BARB, All Individuals, 2007:Network Plus, 2012:Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).

-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

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, 16.6 hours of television per week in 2012 – down 0.6 hours from 17.2 hours in 2011 (Figure 48).
- Children's viewing to the main five PSB channels fell from 33.4% in 2011 to 31.6% in 2012 – this minor drop was, in the main, a result of a decline in viewing to ITV. ITV and Channel 4 portfolio channels has grown steadily since 2007 – children's viewing to the Channel 5 portfolio channels remains relatively low. (Figure 48).
- Entertainment programming accounted for the greatest share of children's viewing across the main five PSB channels and saw an increase in share from 20% in 2007 to 24% in 2012. The share of viewing represented by Soaps, Drama and Children's programming fell between 2007 and 2012 while viewing to Sports programming increased (7% to 14%) (Figure 49).
- Similarly, Entertainment is the most popular genre across the main five PSB channels when looking at the habits of younger (4-9 year olds) and older children (10-15 year olds). The share of viewing represented by Sports programming and Entertainment increased across both age groups (Figure 50).

-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 January/February 2013.

Summary: Children's viewing and programming



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 2012 highlights variations in viewing across the each of the channels (Figure 51):
 - **BBC One:** Viewing to National News accounted for 11%, the highest across any of the channels. Sports programming accounted for 24% of children's viewing to BBC One in 2012.
 - **BBC Two:** Other Factual (30%) and Children's (21%) programming was most popular on BBC Two.
 - **ITV:** Entertainment programming accounted for 40% of children's viewing to the channel, the highest proportion across all the main PSB channels. This was followed by Soaps which accounted for 19% of children's viewing to ITV.
 - **Channel 4:** Entertainment (32%), Other Factual (28%) and Films (18%) dominate children's viewing on Channel 4, representing a combined total of 78% of viewing to the channel.
 - **Channel 5:** The most popular genres on Channel 5 among children in 2012 were Children's (27%), Films (27%) and Other Factual (20%).
- Overall, children's programming on the main five PSB channels accounted for 7% of children's viewing to these channels (16 hours per child across the year) – this was predominantly across BBC Two and Channel 5.
- Analysis of the breakdown in viewing to children's programming by sub-genre shows that while BBC Two provides a range of programming including Animation, Entertainment, Factual and Pre-school, Channel 5's programming is predominantly targeted towards the pre-school audience. Similarly, CBeebies is targeted at younger viewers with Pre-school programming representing 91% of children's viewing to the genre in 2012. Viewing to CBBC is spread across Drama, Factual, Animation and Entertainment (Figure 52).

-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 January/February 2013.

Summary: Children's viewing and programming



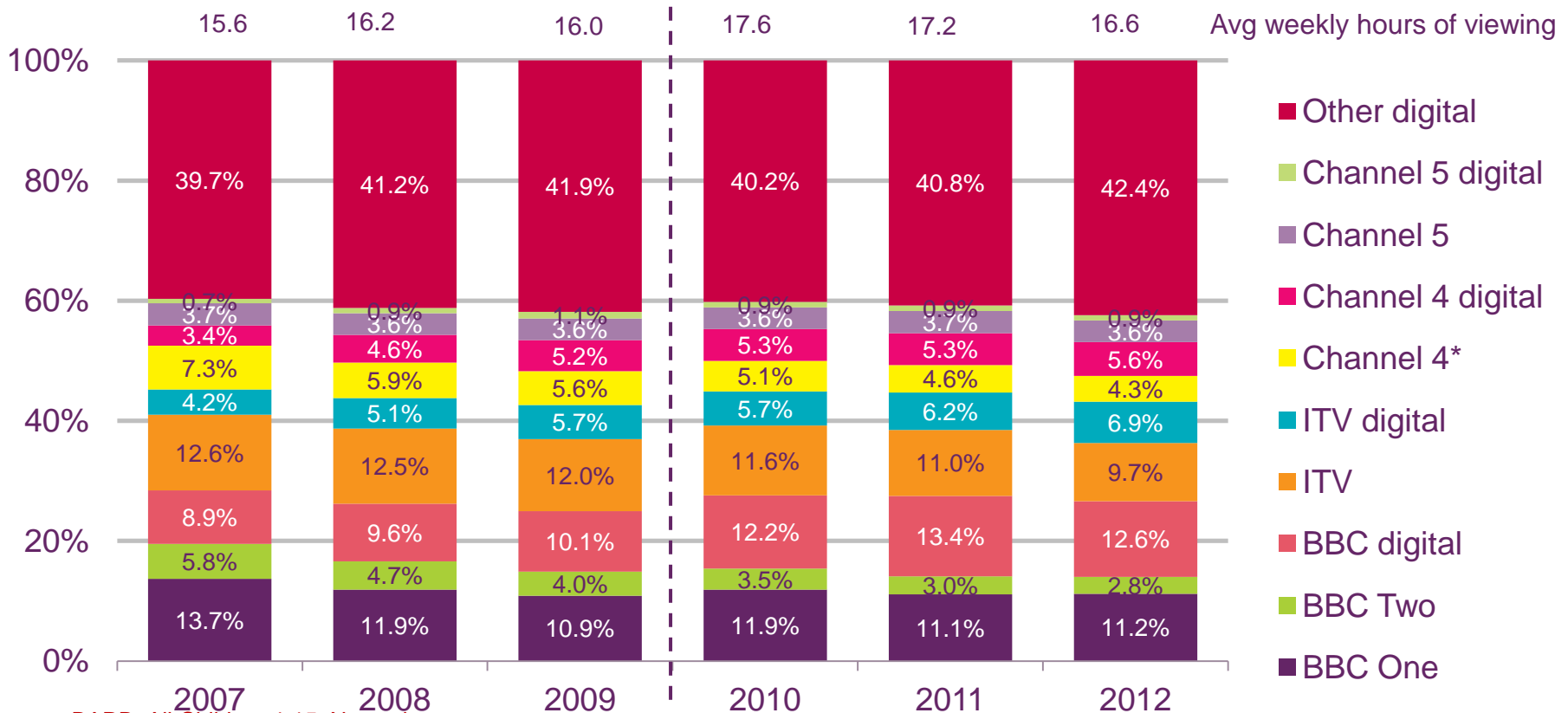
A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- Overall children's viewing to children's programming across the main five PSB channels more than halved from 37 hours per child in 2007 to 16 hours in 2012. While viewing increased by 2 hours on Channel 5, viewing fell by 10 hours on both BBC One and BBC Two (Figure 53).
- However, as seen across trends in viewing to other genres, while viewing to children's programming has declined on the main five PSB channels, there has been an increase in viewing to the genre across the portfolio channels, most notably BBC channels. Viewing to the children's genre across *Other Multichannels* has also increased across all age groups as the overall time spent watching children's programming has increased from 212 hours in 2007 to 232 hours in 2012 (Figure 54).

-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 January/February 2013.



Fig 48 Channel shares for the main PSB channels and their digital portfolio channels – Children, All homes, 2007-2012



Source: BARB, All Children 4-15, Network.

* C4 data 2007-09 includes S4C as Channel 4 content was carried on the channel; from 2010 it is excluded as S4C ceased to broadcast Channel 4 content following DSO in Wales.

-BBC digital = BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, CBeebies, CBBC

-ITV digital = ITV+1, ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV;

-Channel 4 digital = Channel 4+1, E4, E4+1, More4, More4+1, Film4, Film4+1, 4Music, 4Seven

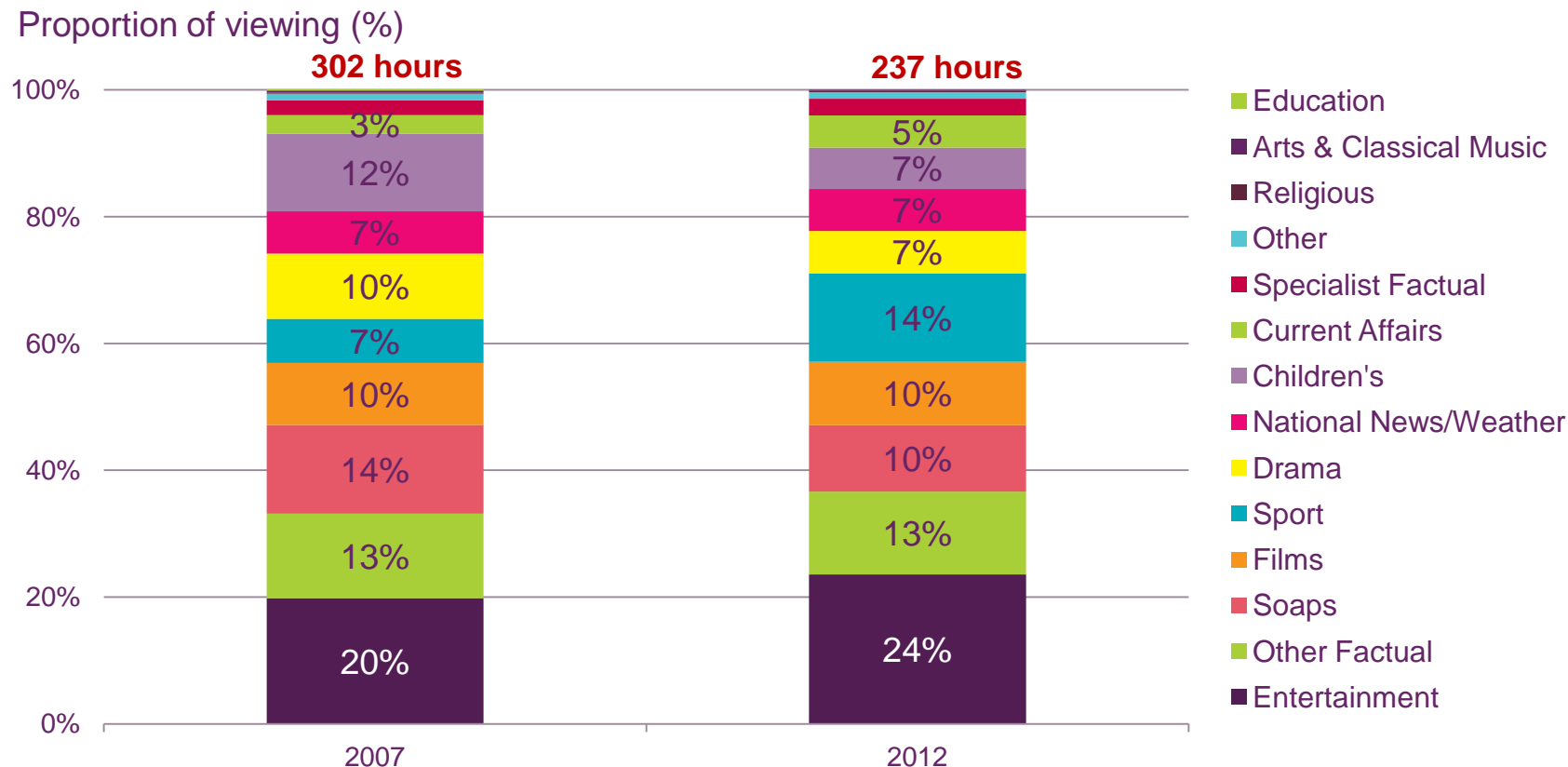
-Channel 5 digital = Channel 5+1, 5*, 5*+1, 5USA, 5USA+1

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

Children's viewing and programming



Fig 49 Children's viewing by genre on the main five PSB channels, 2007 vs. 2012



Source: BARB, All children (4-15), Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).

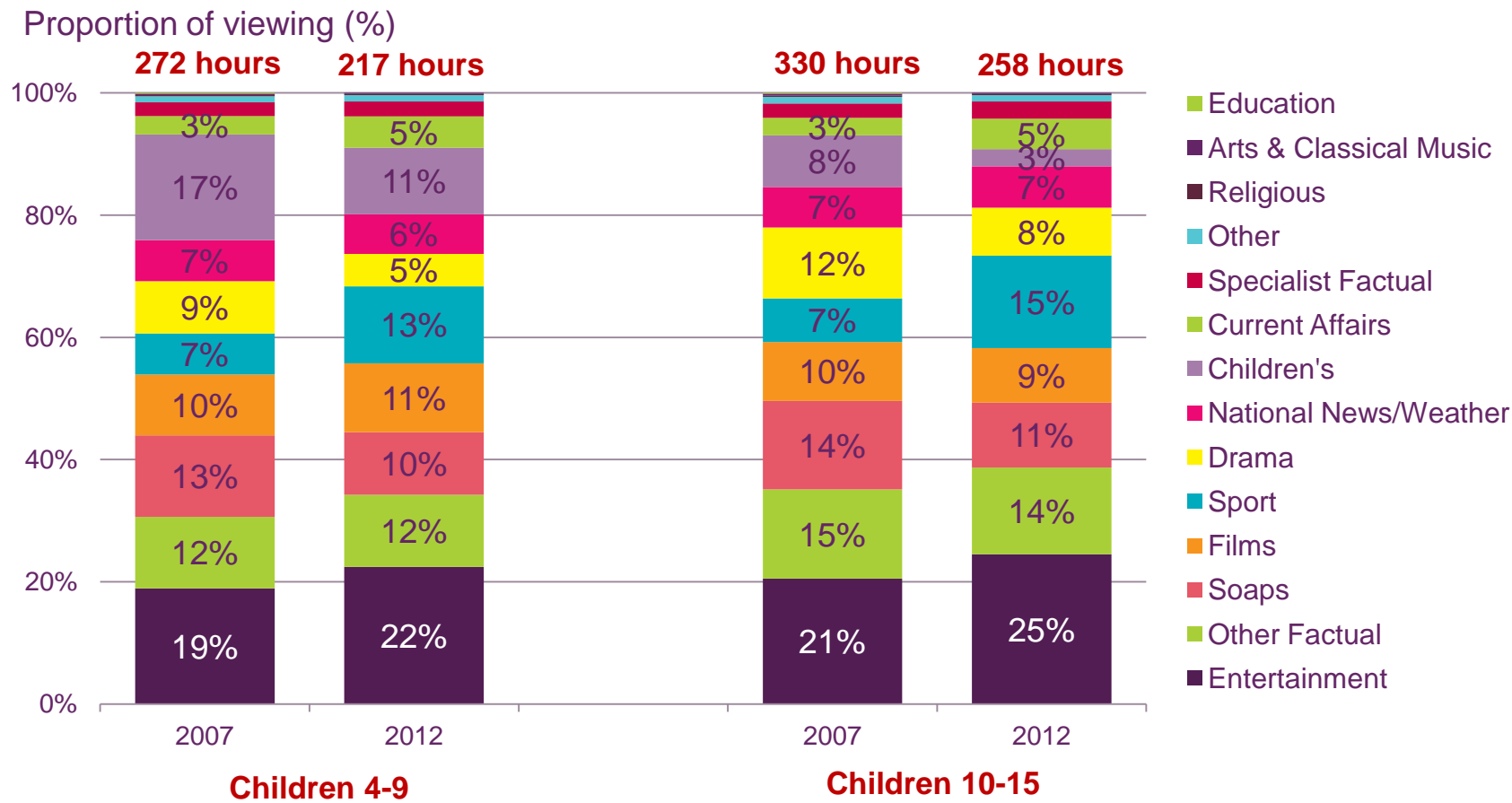
-Network viewing-excludes nations/regions programming. See *Definitions: All genres analysis*.

-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 50 Children's viewing by genre on the main five PSB channels, 2007 vs. 2012



Source: BARB. Children 4-9, Children 10-15, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).

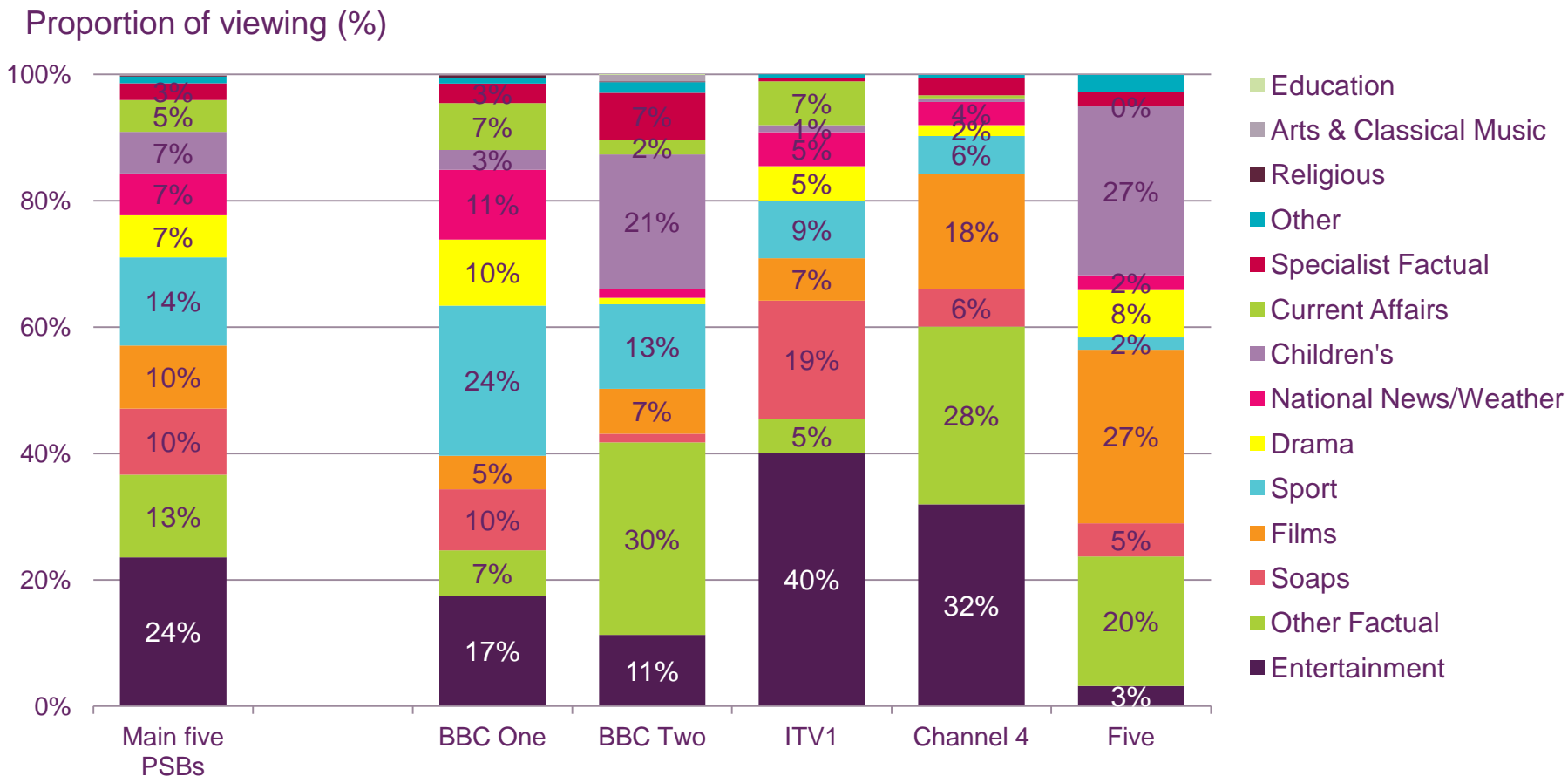
-Network viewing-excludes nations/regions programming. See *Definitions: All genres analysis*.

-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



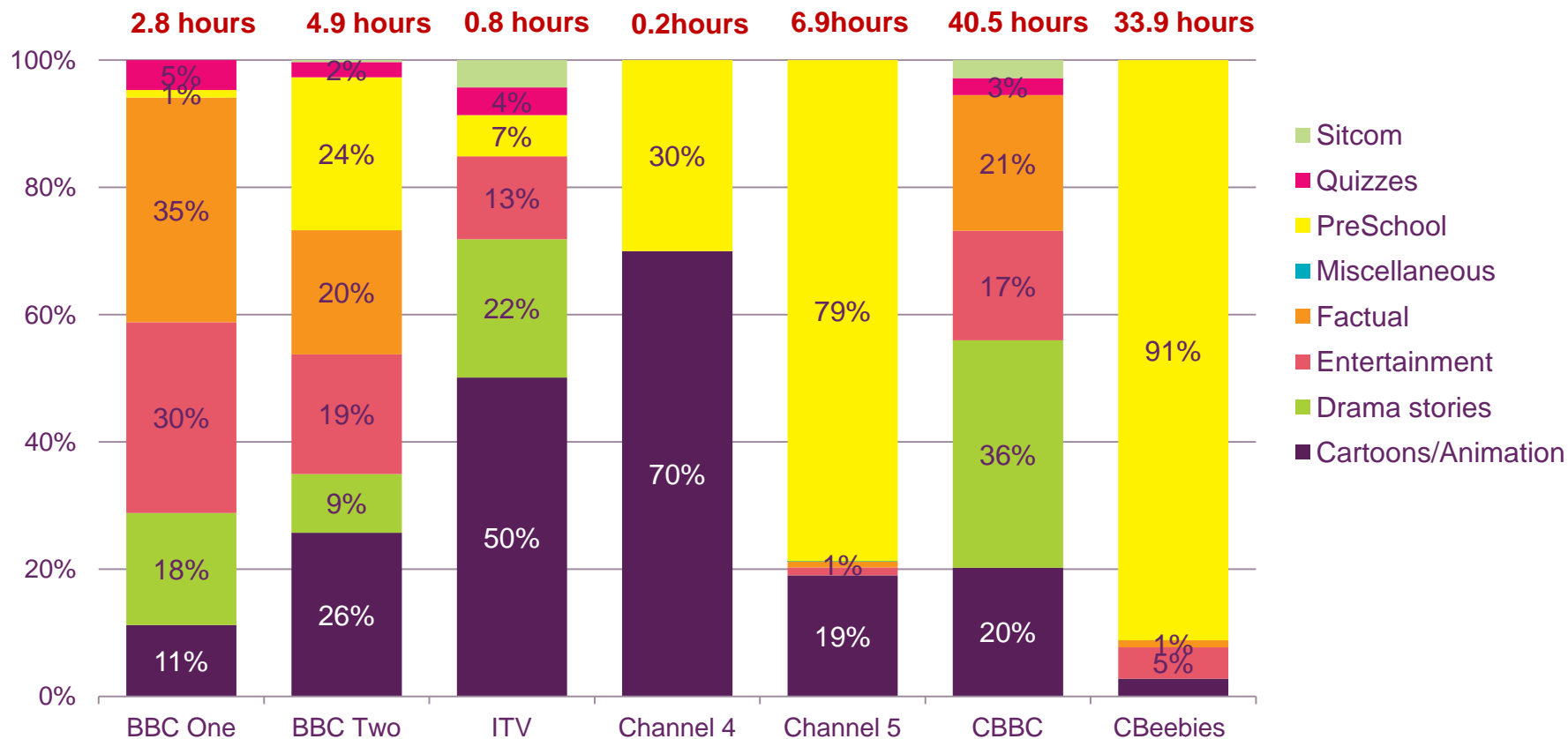
Fig 51 Children's viewing by genre on the main five PSB channels by channel, 2012



Source: BARB. All Children (4-15), Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -Network viewing-excludes nations/regions programming. See *Definitions: All genres analysis*.

Fig 52 Children's viewing of the Children's genre by subgenre, 2012

Proportion of viewing (%)

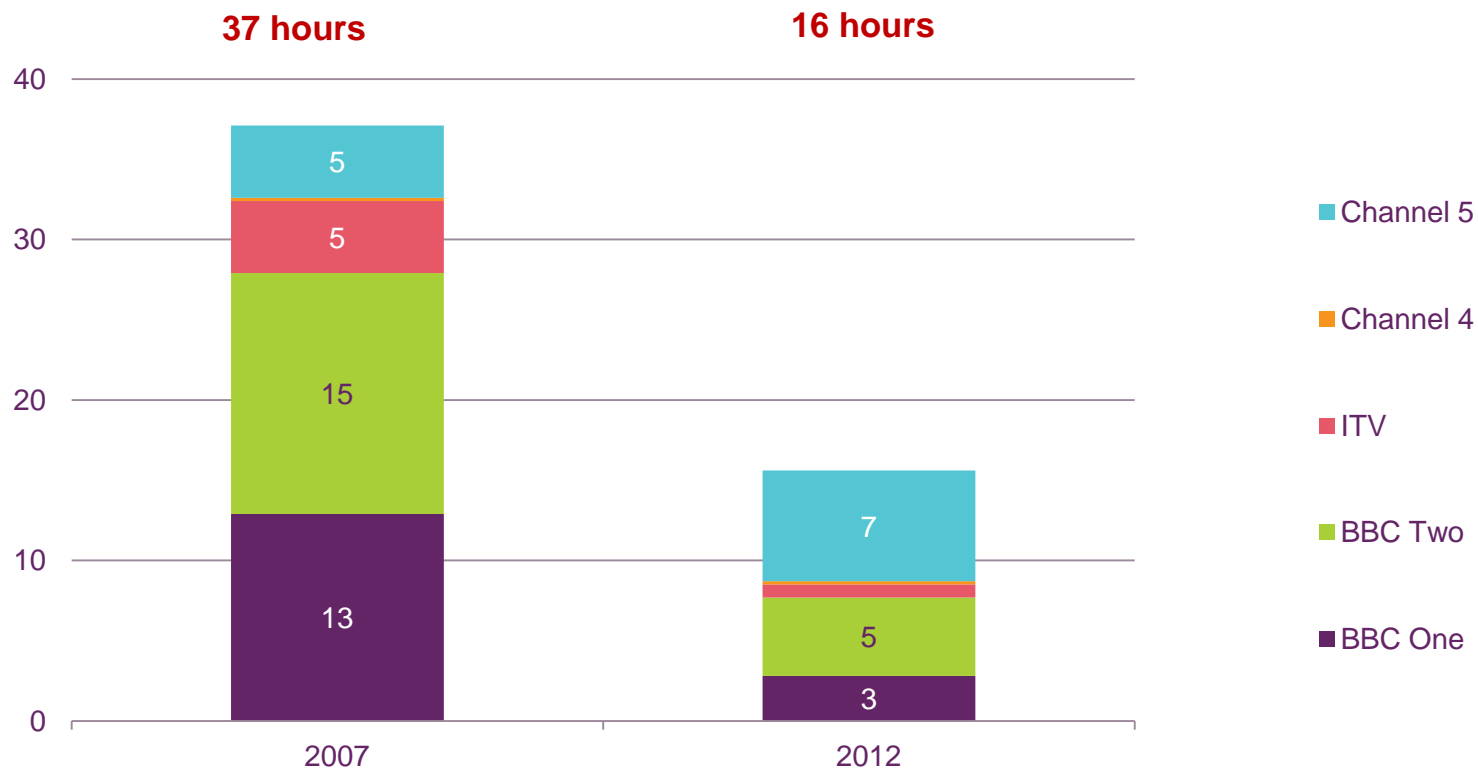


Source: BARB, All children (4-15), Network.

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

Fig 53 Children's viewing hours of Children's genre - Main five PSB channels - 2007 vs. 2012

Total hours per year watched by average child



Source: BARB. Children, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).

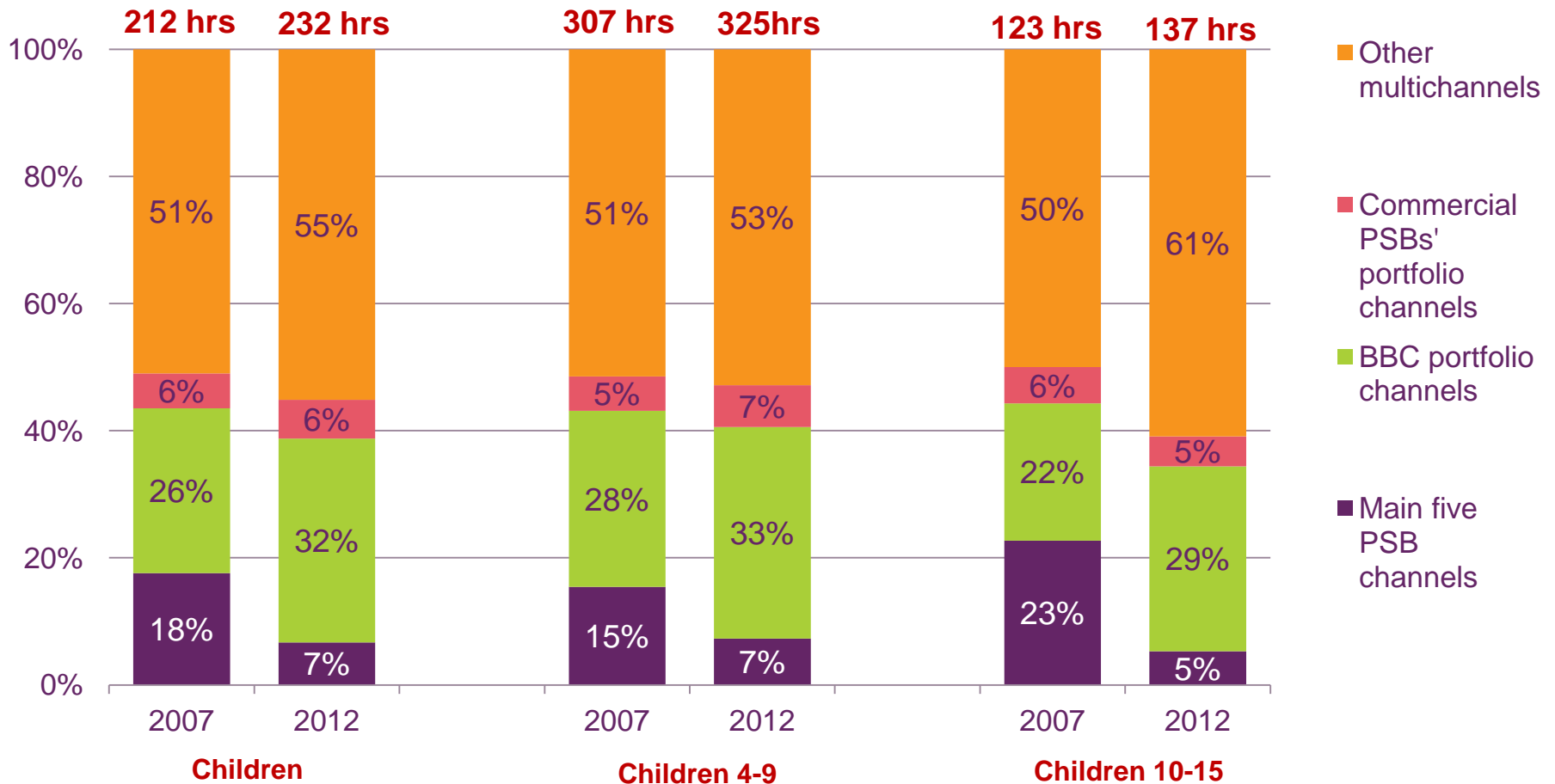
-Based on total minutes of viewing of 'Childrens'. See *Definitions: PSB genres analysis*.

-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 54 Share of viewing to the Children's genre by channel groups, 2007 vs. 2012



Source: BARB, Children (4-15), 2007:Network Plus, 2012:Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -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.

Summary: National News and Current Affairs, 2007 vs. 2012

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.

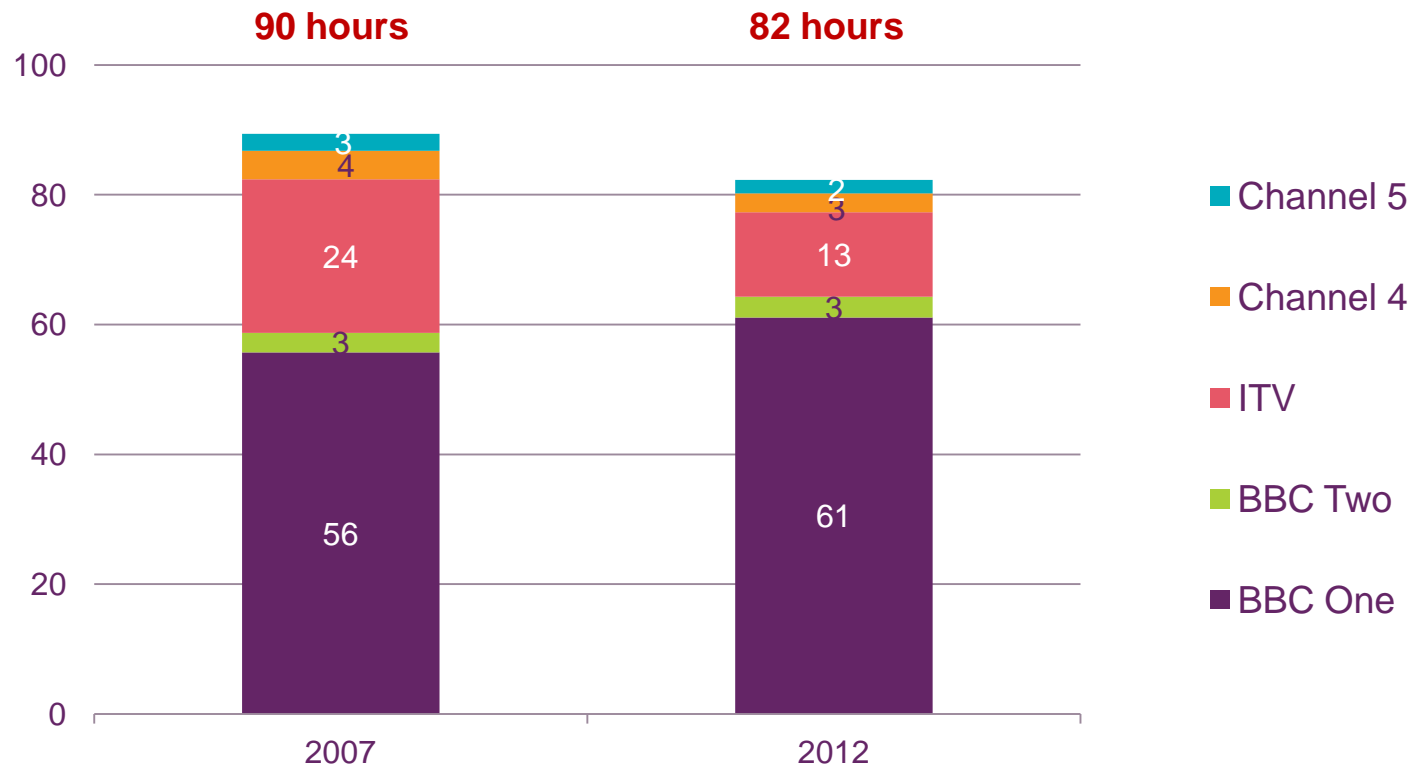
- Between 2007 and 2012, viewing to **National News** programming on the main five PSB channels declined from 90 hours a year to 82 hours (Figure 55). Viewing to National News fell from 24 hours in 2007 to 13 hours in 2012 on ITV – over the same period viewing increased on BBC One by 5 hours to 61 hours in 2012.
 - The age profile of news viewers tends to be skewed towards older age groups across all of the five main PSB channels. Viewers aged 45 or over accounted for just over three-quarters (77%) of all news viewers across the main five PSB channels in 2012. Channel 4 news audiences tend to be slightly younger than the other PSB channels. BBC One, BBC Two and Channel Four tend to attract a greater proportion of ABC1 viewers than ITV and Channel 5. (Figures 56 & 57).
 - Trend data suggests that with the exception of particular peaks, National News viewing across **all channels** has remained fairly steady over the years (Figure 58).
- Between 2007 and 2012, overall hours of viewing to **Current Affairs** on the main five PSB channels increased from 37 hours to 47 hours. Viewing increased by 5 hours a year on BBC One and by 6 hours on ITV. (Figure 59).
- Analysis of National News consumption across **all channels** shows that while the total hours of news viewing fell on the main five PSB channels between 2007 and 2012, the overall time spent watching National News has remained stable (104 hours in 2007, 103 hours in 2012). The split in viewing to Current affairs programming across all channels has remained fairly steady between 2007 and 2012 as the overall time spent watching this genre increased from 41 hours to 51 hours (Figure 60).

- 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 January/February 2013.

- See *Definitions: PSB genre analysis*.

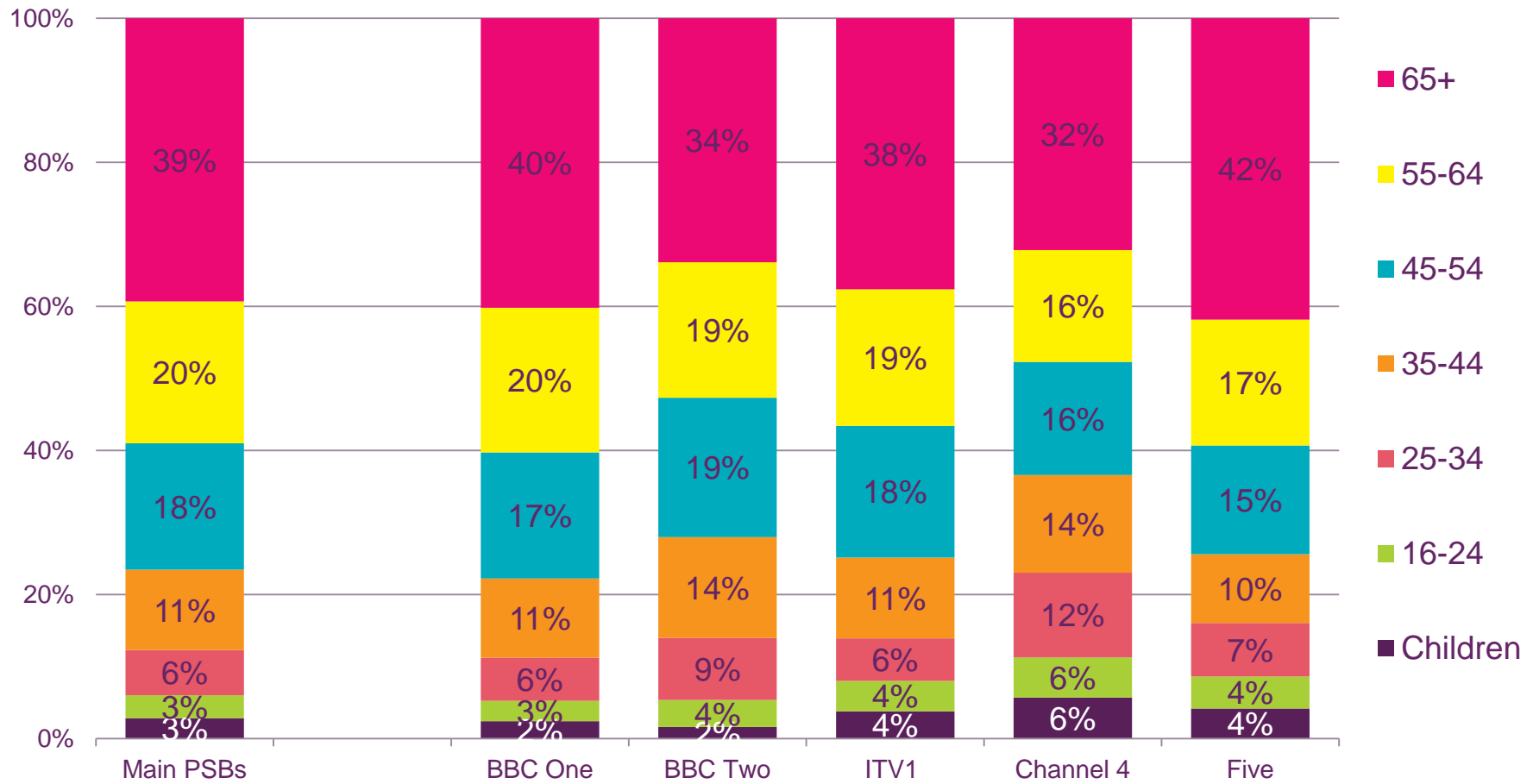
Fig 55 Total viewing of National News – Main five PSB channels only, 2007 vs. 2012

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



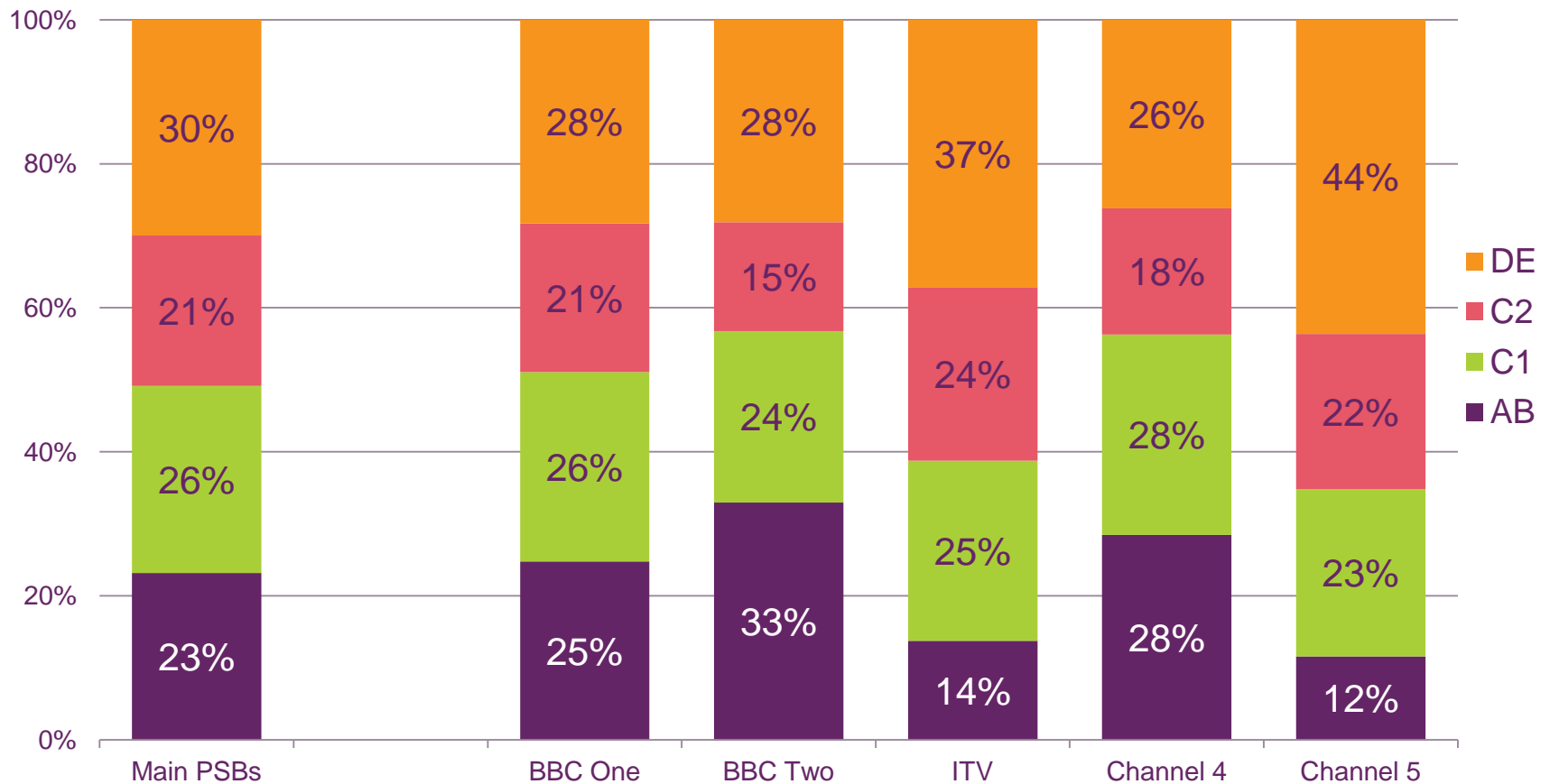
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -Based on total minutes of viewing of 'News: National/International'. See *Definitions: PSB genre analysis*.
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Fig 56 Age profile of National News viewers, 2012



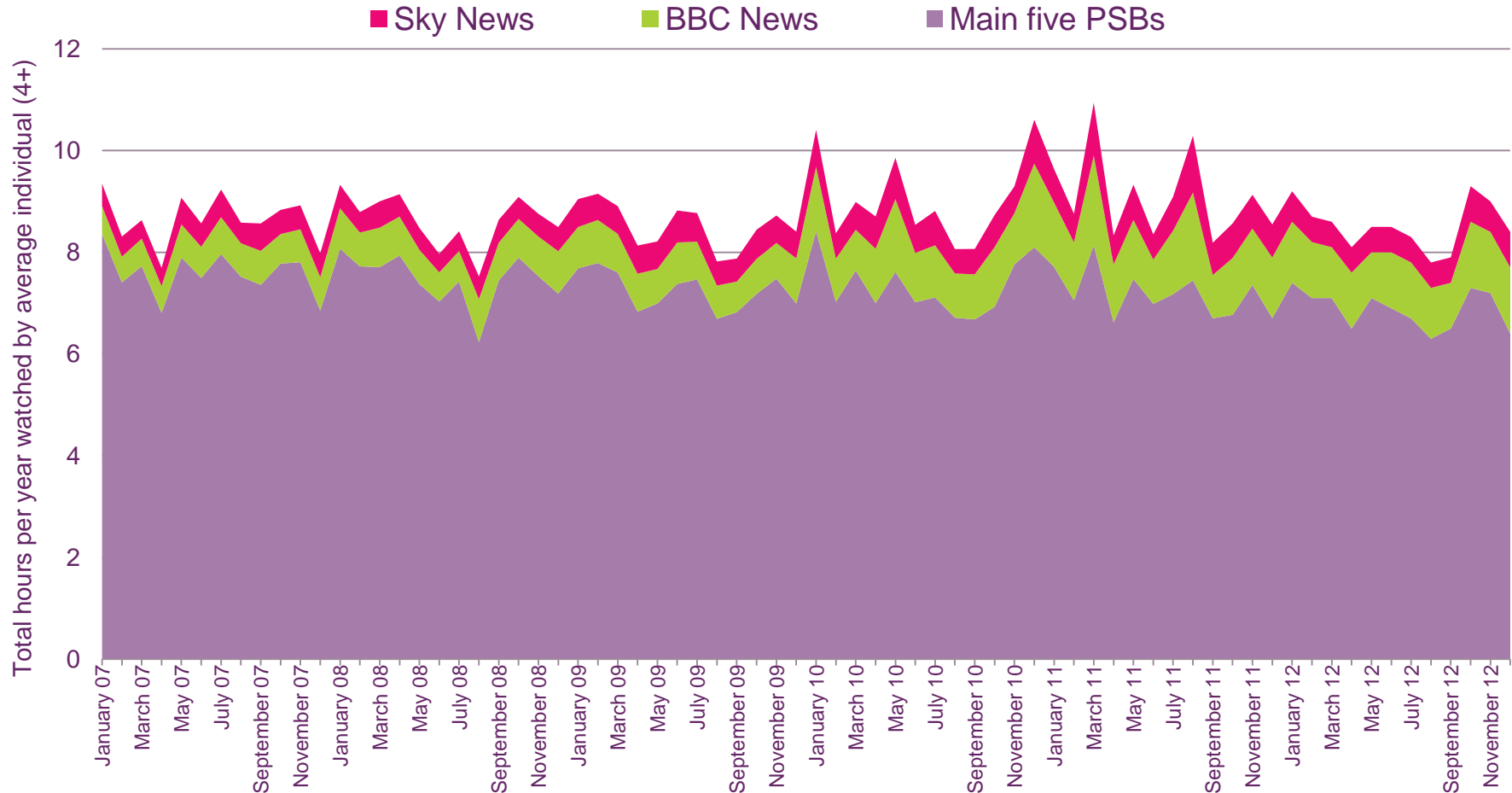
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5). Profile data calculated on a base of All Individuals.
 -Based on viewing of 'News: National/International'. See *Definitions: PSB genre analysis*.

Fig 57 Socio-economic profile of National News viewers, 2012



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5). Profile data calculated on a base of All Individuals.
 -Based on viewing of 'News: National/International'. See *Definitions: PSB genre analysis*.

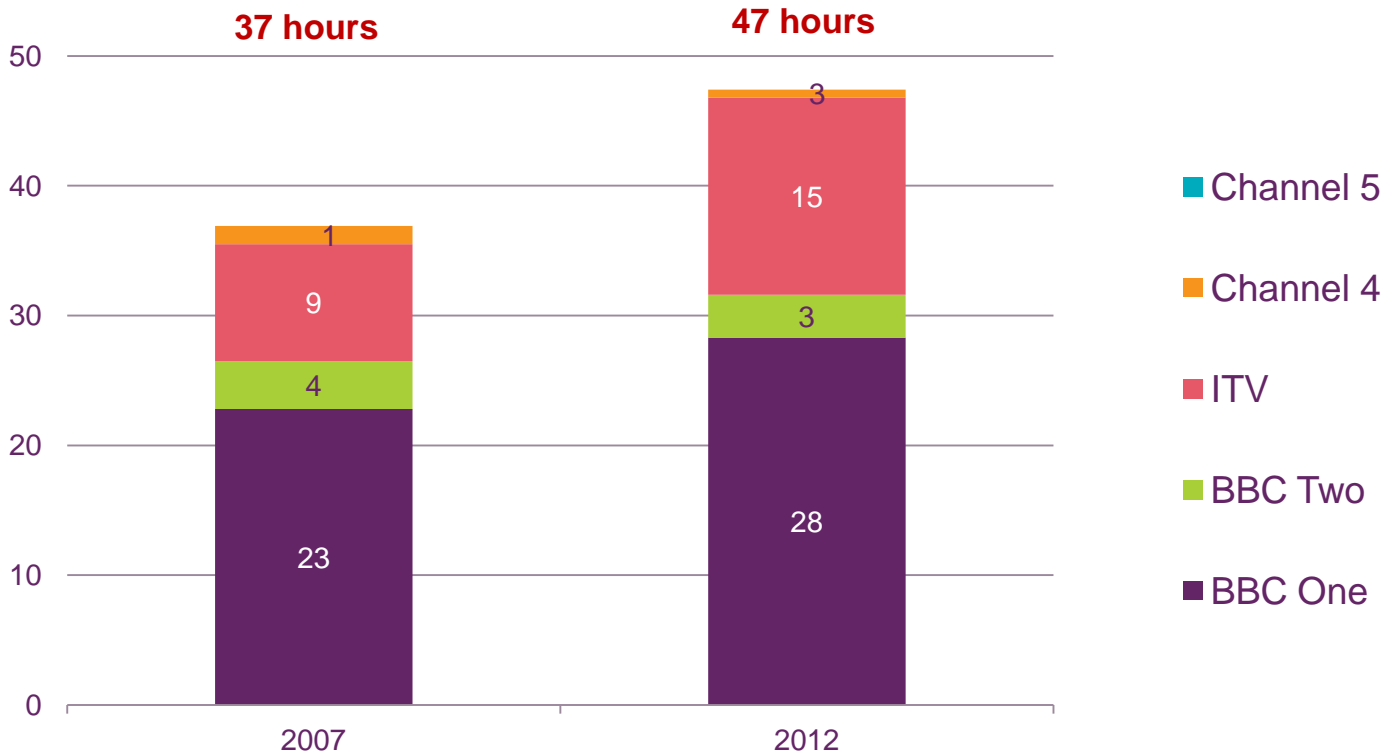
Fig 58 Total viewing to National News across the main five PSB channels and rolling news services, 2007-2012



Source: BARB, All Individuals. 2007-2009:Network Plus/ 2010+:Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -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.

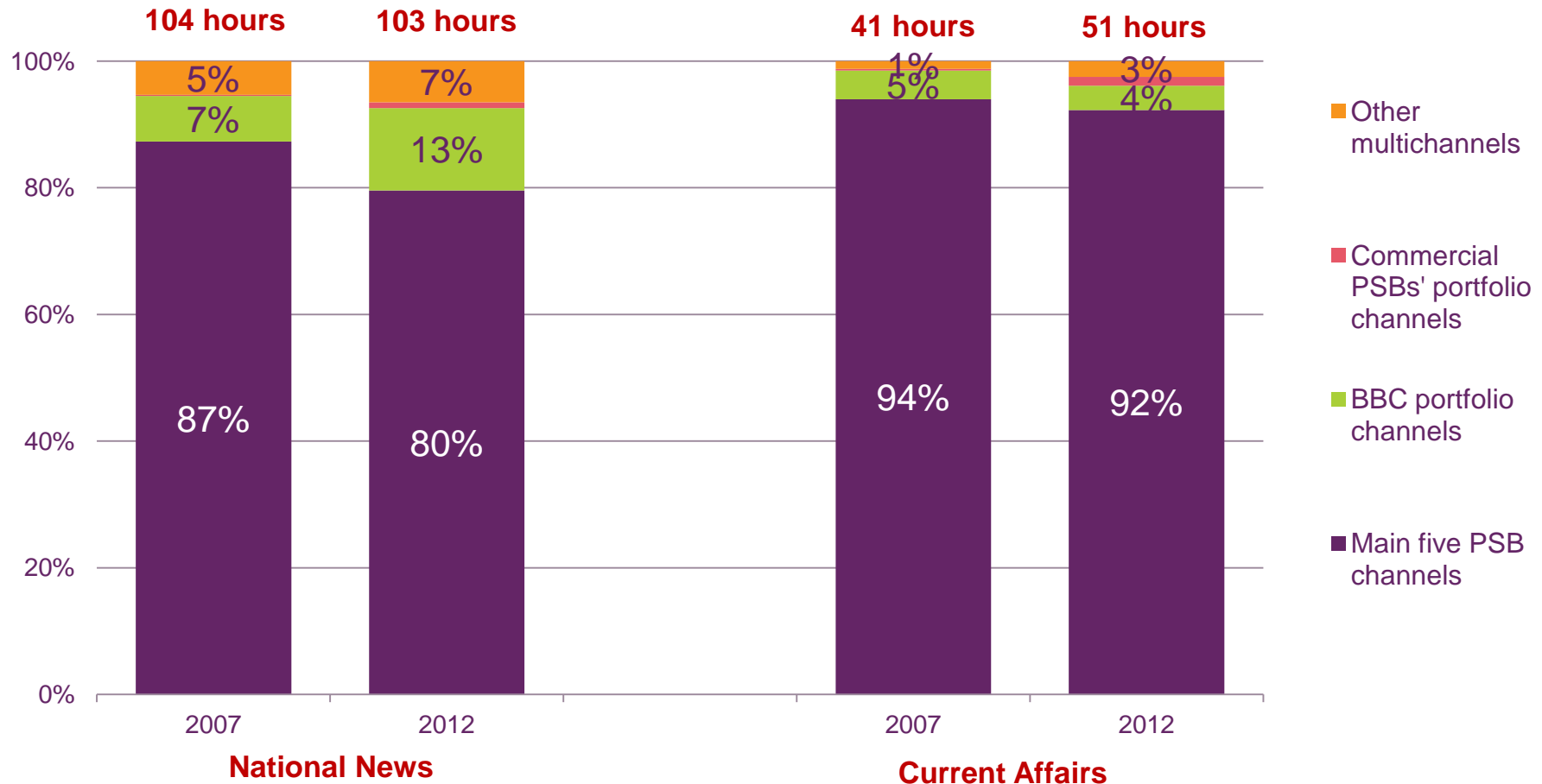
Fig 59 Total viewing of Current Affairs - Main five PSB channels only, 2007 vs. 2012

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



Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).
 -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 60 Share of viewing to National News and Current Affairs by channel groups, 2007 vs. 2012



Source: BARB, All Individuals, 2007:Network Plus, 2012: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



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, an average of 83 hours of National News and 26 hours of Nations/Regions news were watched in 2012. Analysis by devolved nation and English regions shows considerable variation in these levels (Figure 61).
- Devolved nations:
 - Viewers in Scotland spent 86 hours watching National News programming and 32 hours watching Nations news – with both levels higher than the UK average of 83 hours and 26 hours respectively.
 - Viewing of National News in Wales (88 hours) was the highest of the devolved nations but viewing to the Nations/Regions news (30 hours) was the lowest of the devolved nations – although higher than the UK average (26 hours).
 - Viewers in Northern Ireland spent the least time watching National News (75 hours) and the most time watching Nations/Regions news (36 hours) than across the other devolved nations and the UK average (Figure 61).
- English regions:
 - Viewing to National News was highest in the South West (99 hours) and North East (91 hours) and lowest in London (75 hours) and the Midlands (78 hours).
 - Nations/Regions news viewing was highest in the Border region (41 hours) and lowest in London (18 hours) (Figure 62).

-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 January/February 2013.



Summary: Nations/regions News

- Between 2007 and 2012, the total time spent watching Nations/Regions news across the year per individual, remained fairly stable(28 hours in 2007, 26 hours in 2012). While viewing increased by one hour on BBC One, there was a two hour fall on ITV (Figure 63).
- Looking at the share of viewing of Channel 3 and BBC One evening nations/regions news programmes in 2012 compared to 2007 shows that across the whole of the UK, the average share of the main weekday evening nations/regions news fell by 1 point on Channel 3 and remained stable on BBC One (Figure 64).
- In the devolved nations, Channel 3's share fell by 5 points in Northern Ireland but increased by 2 points in Scotland. BBC One's share fell in Northern Ireland (down 1 point) and Wales (down 6 points) while increasing in Scotland (up 3 points) (Figure 64).
- In the English regions in 2012:
 - Channel 3's shares fell in the East (down 8 points), Meridian (down 4 points), Midlands (down 4 points) and Yorkshire (down 3 points). Its share rose most noticeably in Border (up 14 points) and the North East (up 4 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 London (down 1 point) and the Midlands (down 2 points). The most notable increases were seen in the West (up 13 points) and the South West (up 12 points) (Figure 65).

-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 January/February 2013.

Fig 61 Total hours of viewing of National News and BBC/Channel 3 nations News by nation, 2012

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

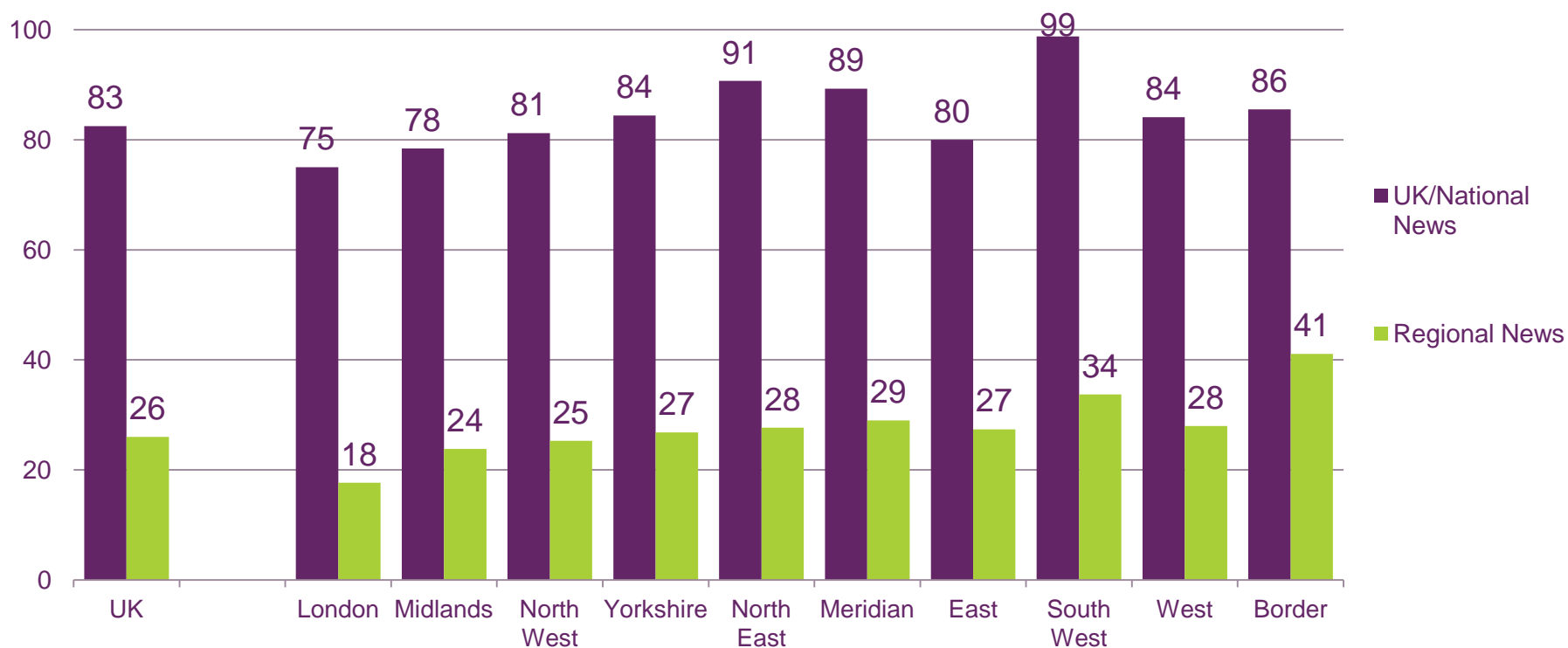


Source: BARB, All Individuals. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).

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

Fig 62 Total hours of viewing of National News and BBC/Channel 3 regions News by English region, 2012

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

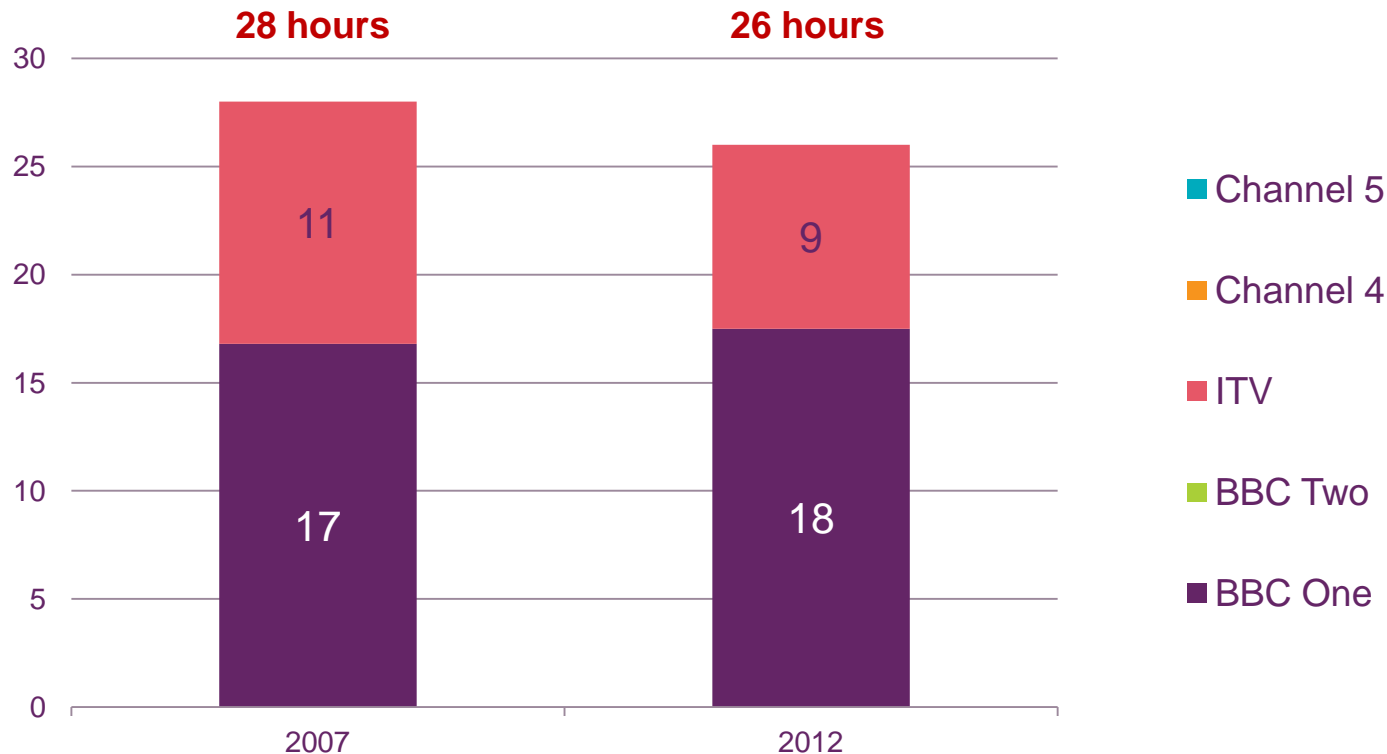


Source: BARB, All Individuals. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5)

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

Fig 63 Total viewing of Nations/Regions News – Main five PSB channels, 2007 vs. 2012

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



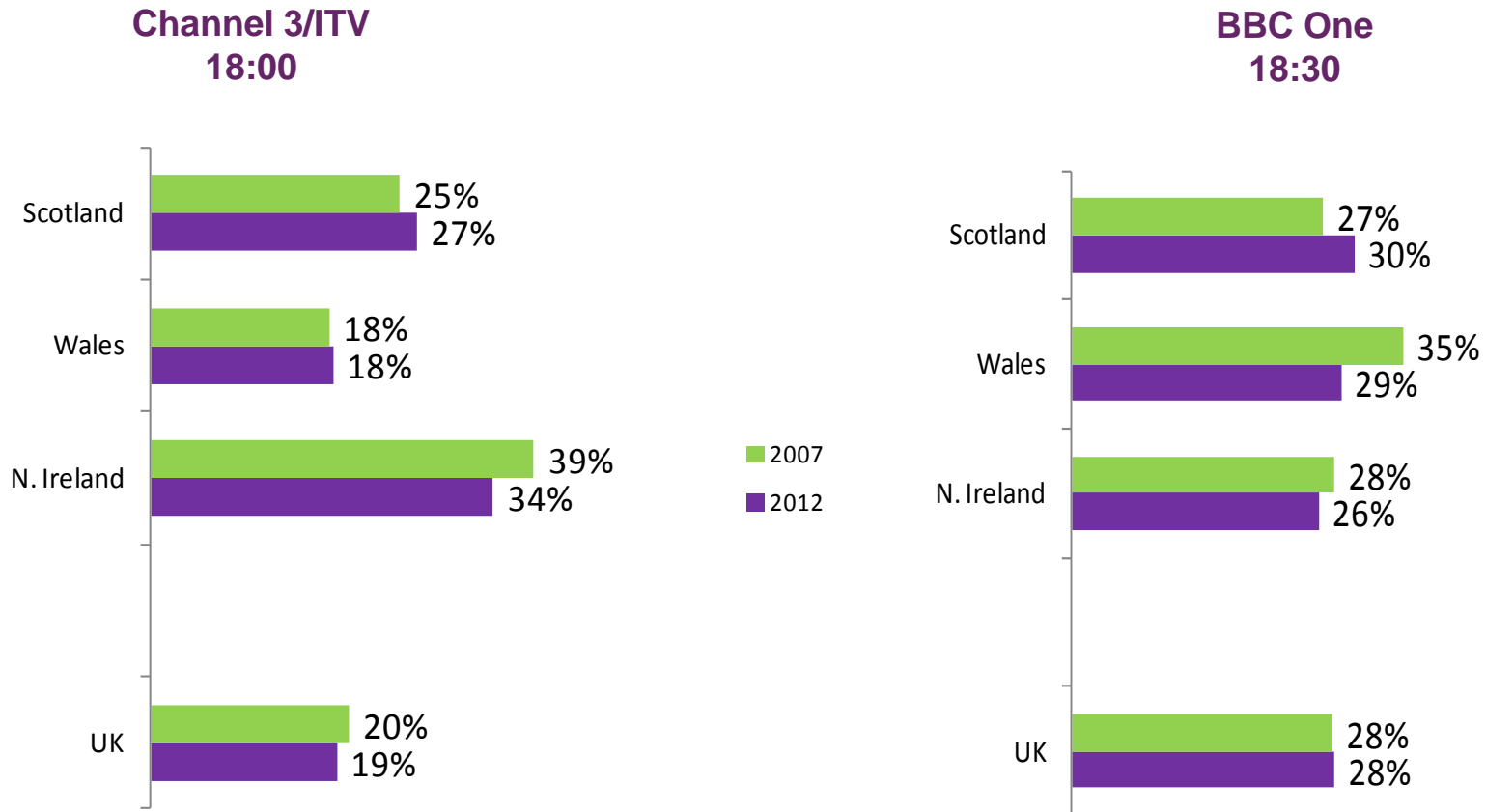
Source: BARB, All Individuals, Network. Main five PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5).

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

-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 64 Channel 3 and BBC nations evening news viewing share, 2007 and 2012



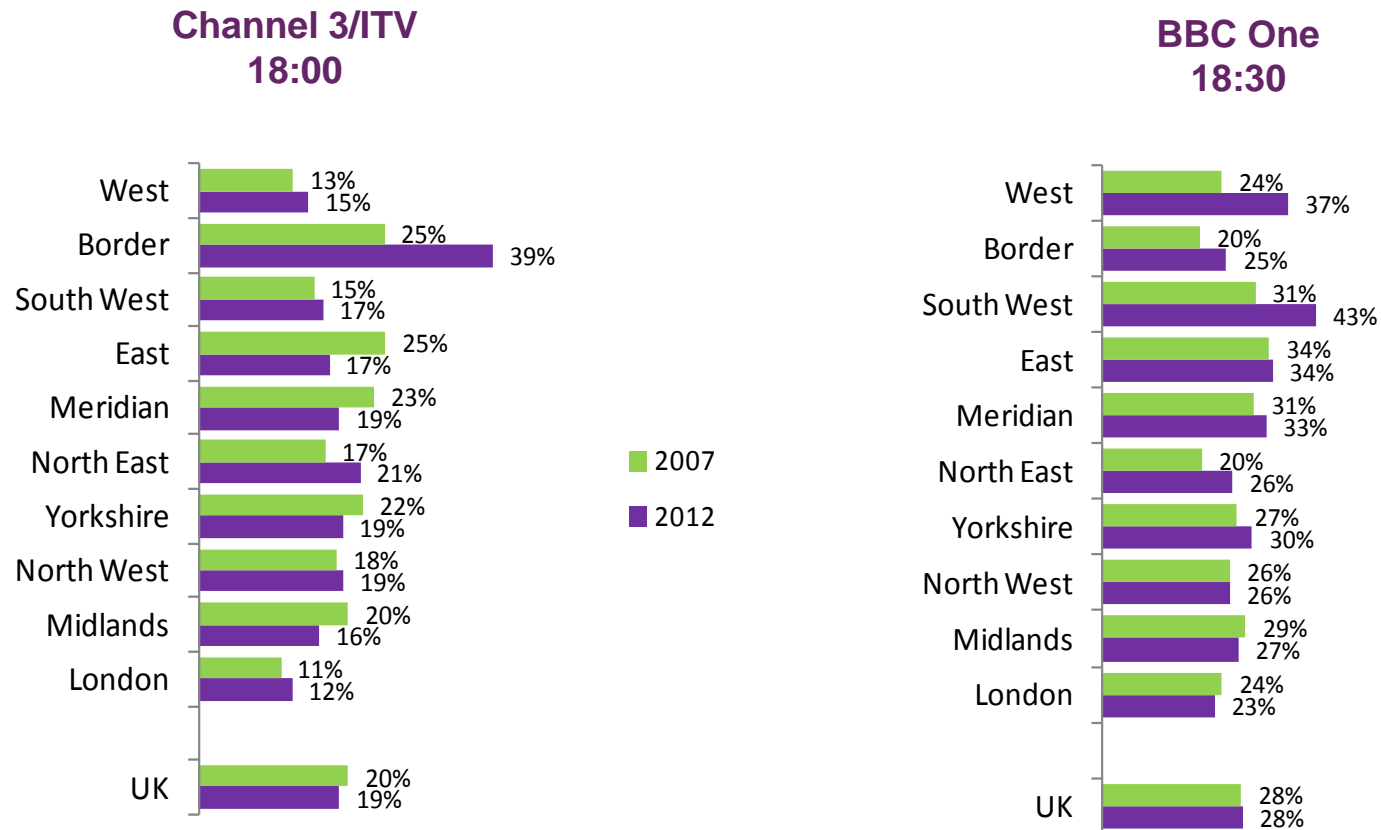
Source: BARB, All Individuals.

-Based on average channel shares of 'News: Regional News' genre programming start time 17:50-18:40 Monday-Friday. UK figure based on dayparts ITV 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 2007 vs. 2012. Pre and post panel data should be viewed with caution.

Fig 65 ITV and BBC regional evening news viewing share, 2007 and 2012



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 ITV Mon-Fri 1800-1830, BBC Mon-Fri 1830-1900. ITV figures based on ITV + ITVHD data.

-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 2007 vs. 2012. Pre and post panel data should be viewed with caution.

Summary: Viewing of range of programmes – Digital portfolio channels, 2007 & 2012

- **2007:**
 - The digital channels provided programming across a range of genres. However, as the digital portfolio channels tend to be more targeted than their main PSB channels (based on audiences, content, etc), viewing on some channels, including ITV3, More4 and 5USA, was skewed towards specific genres.
 - Other Factual accounted for 55% of viewing on More4 – the highest share compared with the other digital portfolio channels. Few channels aired Specialist Factual programming – the highest proportion across the channels was seen on BBC Four.
 - Entertainment programming featured across all channels (with the exception of Film4), with the genre accounting for 41% of viewing on ITV2.
 - Drama on ITV3 and 5USA attracted the highest shares of viewing (73% and 61% respectively) of the genre.
 - Soaps accounted for between 10-15% of viewing on BBC Three, E4 and ITV2 – this share rose to 38% of viewing on 5*. Content within this genre included soaps shown on the main five PSB channels.
 - Arts & Classical Music represented 10% of viewing on BBC Four – the genre did not feature significantly across the other digital portfolio channels.
- **2012:**
 - Similar trends were noted in 2012 with Other Factual representing 71% of viewing on More4 and Specialist Factual rising to account for 29% of viewing on BBC Four.
 - Entertainment programming accounted for the largest share of viewing on ITV2 (53%), E4 (52%) and BBC Three (38%).
 - Drama continued to dominate viewing on ITV3 (82%) and 5USA (69%).
 - Films were popular across many of the digital portfolio channels including ITV4 (38%) and 5USA (30%).
 - Sports programming accounted for 35% of viewing on ITV4 and 13% of viewing on BBC Three in 2012.

Summary: Viewing of range of programmes - Digital portfolio channels, 2007 vs. 2012

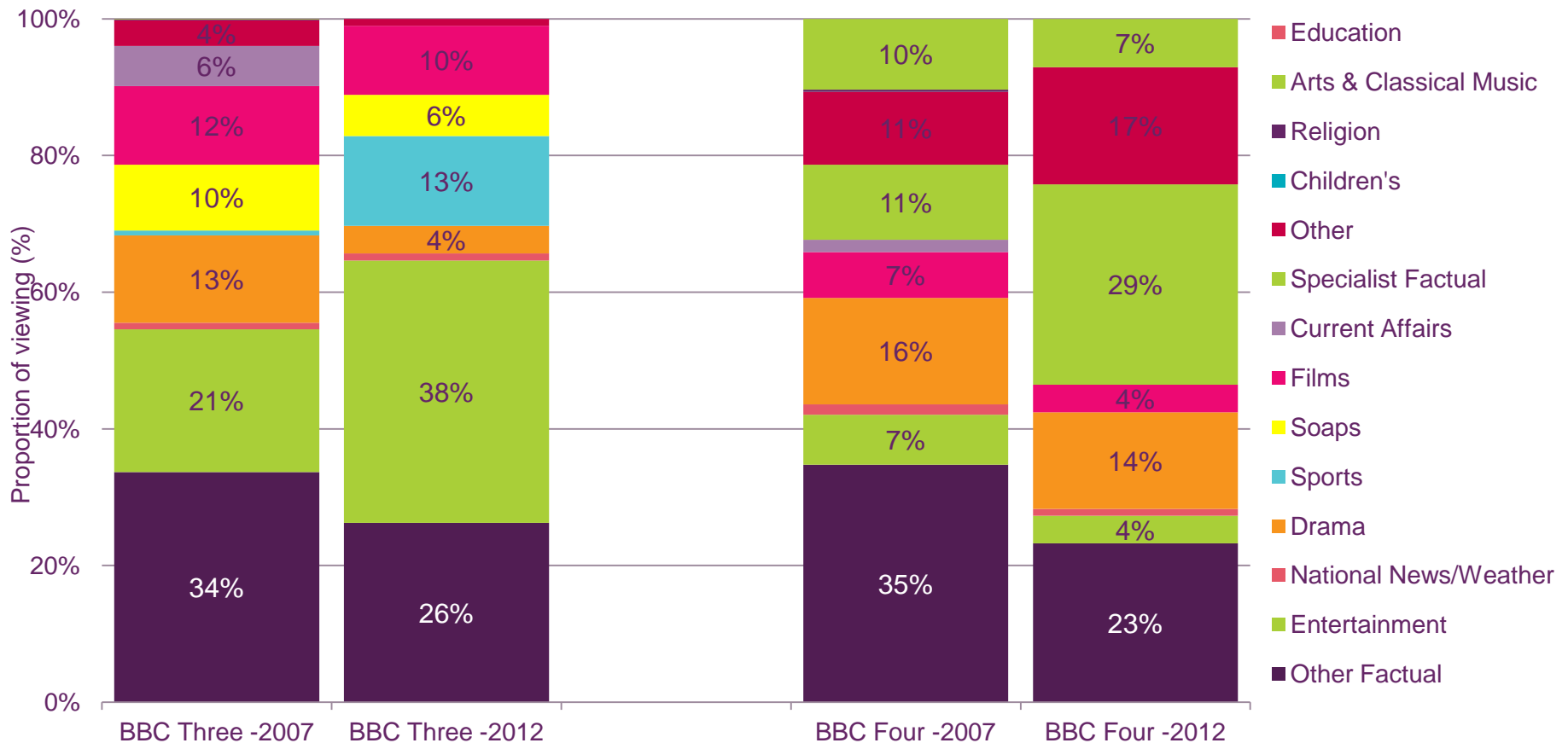


- **BBC digital channels:**
 - Between 2007 and 2012 there was an increase in the share of viewing on **BBC Three** accounted for by Entertainment programming (21% in 2007, 38% in 2012). With its broadcasting hours extended during the London Olympics, the share of viewing on BBC Three represented by Sports increased to 13% in 2012.
 - There was an increase in the share of viewing represented by Specialist Factual (11% in 2007, 29% in 2012) and 'Other' (11% in 2007, 17% in 2012) programming on **BBC Four** between the two periods (the majority of the latter consisted of Contemporary Music). At the same time, the share of viewing to Other Factual fell from 35% in 2007 (the most popular genre) to 23% in 2012.
- **ITV digital channels:**
 - Entertainment (41% in 2007, 53% in 2012) dominated viewing on **ITV2** in both 2007 and 2012, with an increase in share between the two periods.
 - Similarly, Drama continued to dominate viewing on **ITV3** in 2012 (82%) as in 2007 (73%).
 - On **ITV4**, the share of viewing represented by Sports (29% in 2007, 35% in 2012) and Films (32% in 2007, 38% in 2012) increased between 2007 and 2012 as viewing to Other Factual fell from 17% to 6%.
- **Channel 4 digital channels:**
 - Entertainment dominated viewing on **E4** in 2012 with its share of viewing rising from 35% in 2007 to 52% in 2012. Over the same period the share of viewing to Other Factual fell from 31% to 8%.
 - Other Factual continued to dominate viewing on **More4**, with its share increasing from 55% to 71% in 2012. The share of viewing represented by Entertainment (15% in 2007, 6% in 2012) and Drama (12% in 2007, 4% in 2012) programming fell over the two periods.
- **Five digital channels:**
 - Between 2007 and 2012 there was a rise in the share of viewing on **5*** represented by Entertainment (8% to 10%), Drama (6% to 20%) and Films (16% to 23%). Over the same period the share accounted for by Other Factual, Soaps and Children's programming fell.
 - Viewing on **5USA** continued to be dominated by Drama and Films in 2012 as in 2007.

Viewing of range of programmes: by channel



Fig 66 Proportion of viewing by genre – BBC digital portfolio channels, 2007 vs. 2012



Source: BARB, 2007= Individuals, Multichannel Network, 2012= Individuals, Network.

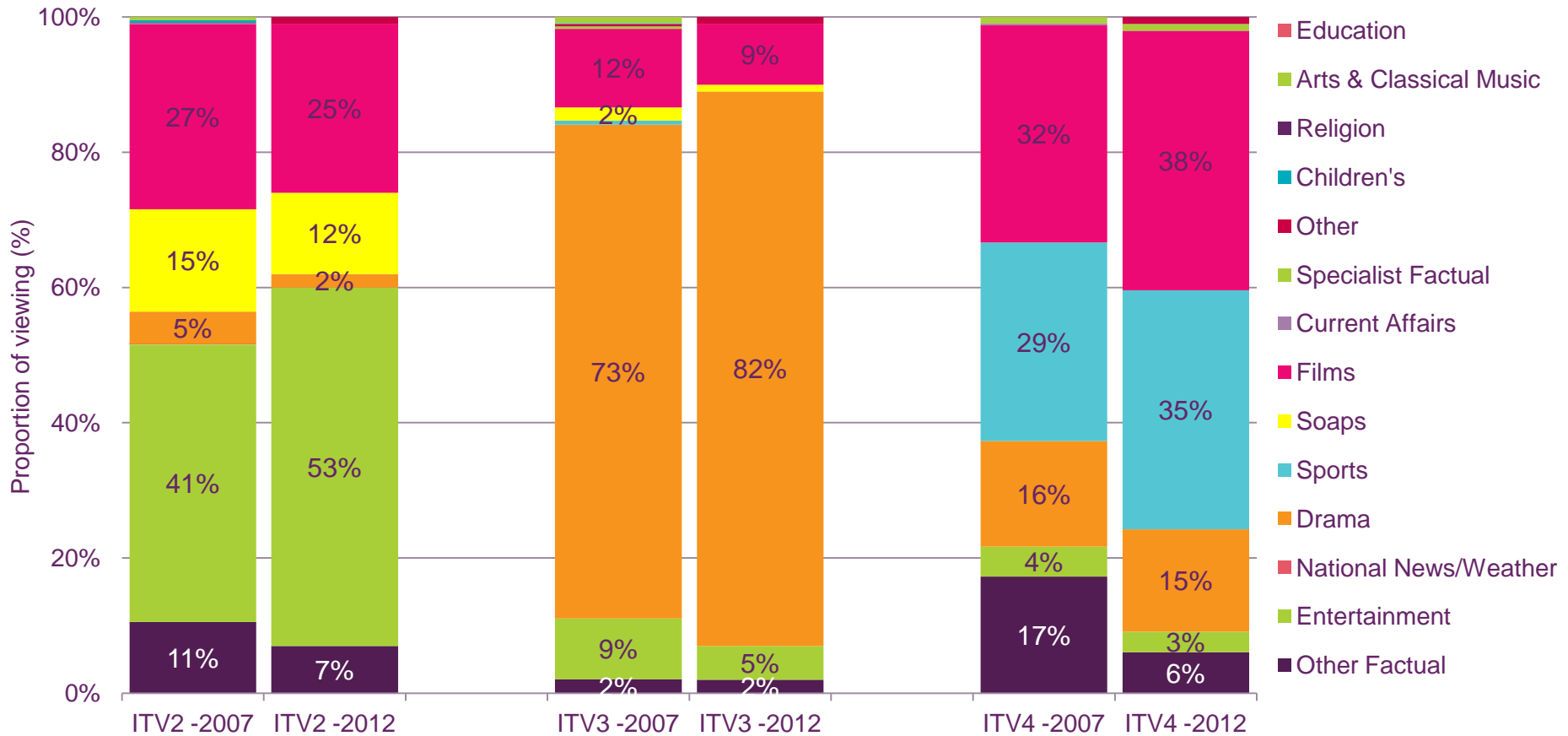
See Definitions: All genres analysis.

-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: by channel



Fig 67 Proportion of viewing by genre – ITV digital portfolio channels, 2007 vs. 2012



Source: BARB, 2007= Individuals, Multichannel Network, 2012= Individuals, Network.

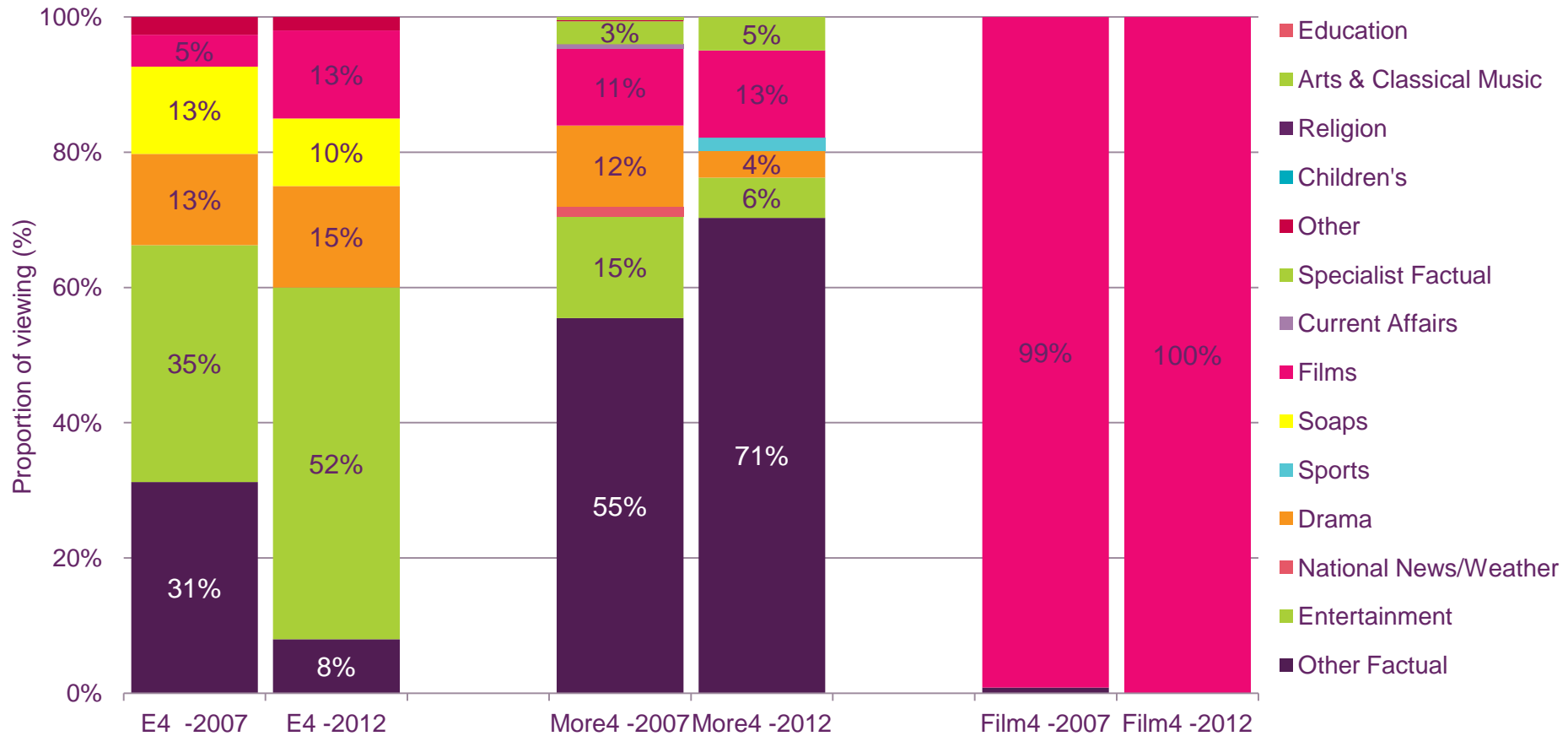
See Definitions: All genres analysis.

-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: by channel



Fig 68 Proportion of viewing by genre – Channel 4 digital portfolio channels, 2007 vs. 2012



Source: BARB, 2007= Individuals, Multichannel Network, 2012= Individuals, Network.

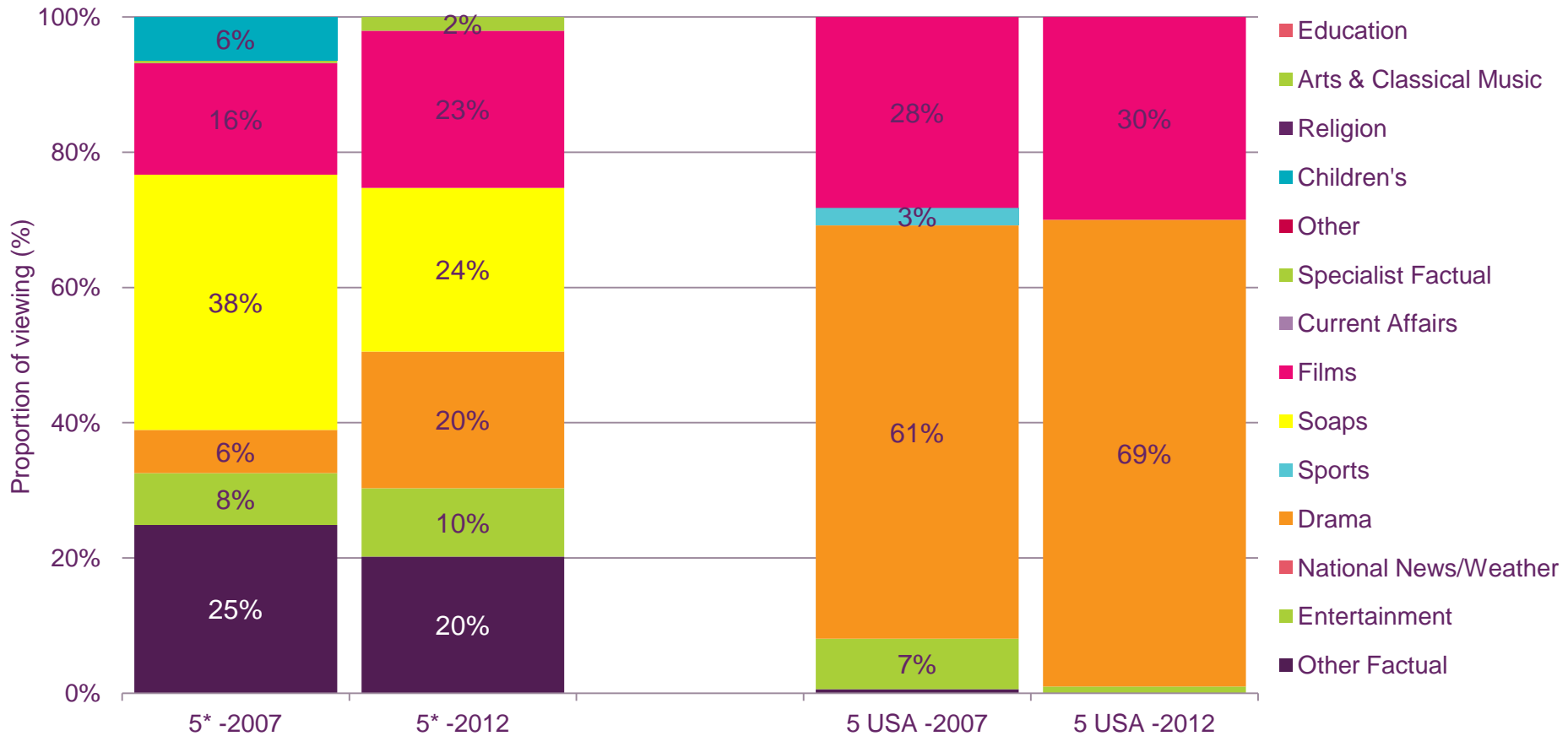
See Definitions: All genres analysis.

-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: by channel



Fig 69 Proportion of viewing by genre – Five digital portfolio channels, 2007 vs. 2012



Source: BARB, 2007= Individuals, Multichannel Network, 2012= Individuals, Network.

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: S4C



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 2012.

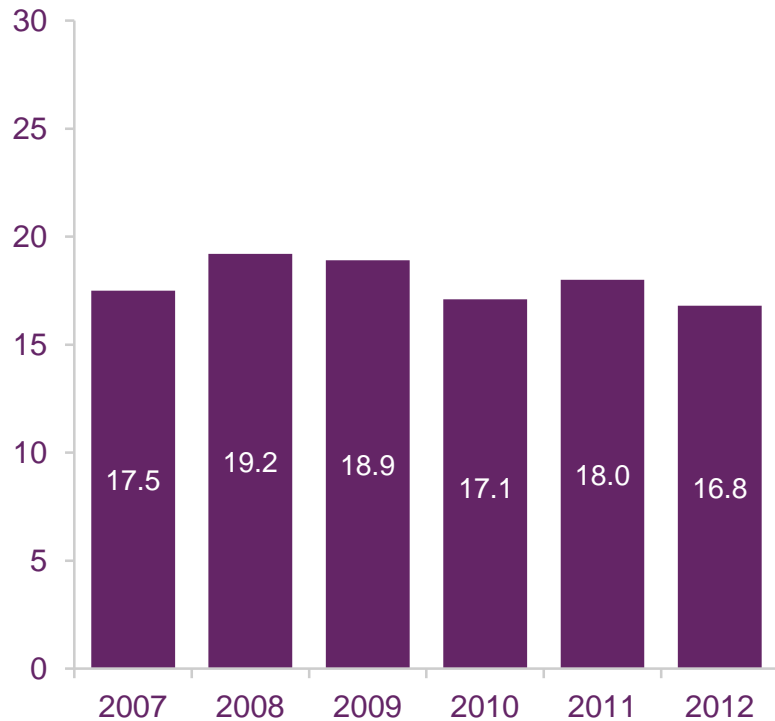
Television viewing data are taken from the BARB measurement system, which examines S4C Welsh output as a whole, in order to provide an overall picture of the amount of Welsh programming viewed. Analysis was carried out based on all Individuals in Wales. Data reported here were supplied by S4C, rather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

- In 2012, S4C Welsh language programming was watched for an average of 16.8 hours per individuals in the S4C region. This is the lowest consumption level over the last five years but less than a 1 percentage point decrease on 2007 (17.5 hours) (Figure 70).
- The weekly reach of Welsh language programming on S4C was 16% in 2012, one percentage point less than the 2011 and the previous two years. In terms of the weekly reach in 000s of viewers, this represented a decrease on 2010 to 2011 and was marginally higher than the number of viewers per week in 2009 (Figure 70).
- In 2012, S4C's share of all viewing in Wales was 1.2%, a marginal dip on 2011. In peak, it accounted for 1.7% of viewing, a decline of 0.3% compared to 2011 (Figure 71).
- Looking at the proportion of viewing hours by genre on S4C in 2012 shows that Sport (21%), Soaps (15%) and Children's programming were the most watched content. Sport and Soaps account for similar amounts of viewing in 2011 and 2012, but the consumption of Children's content has almost doubled compared to the previous year (7% in 2011 to 13% in 2012) (Figure 72).

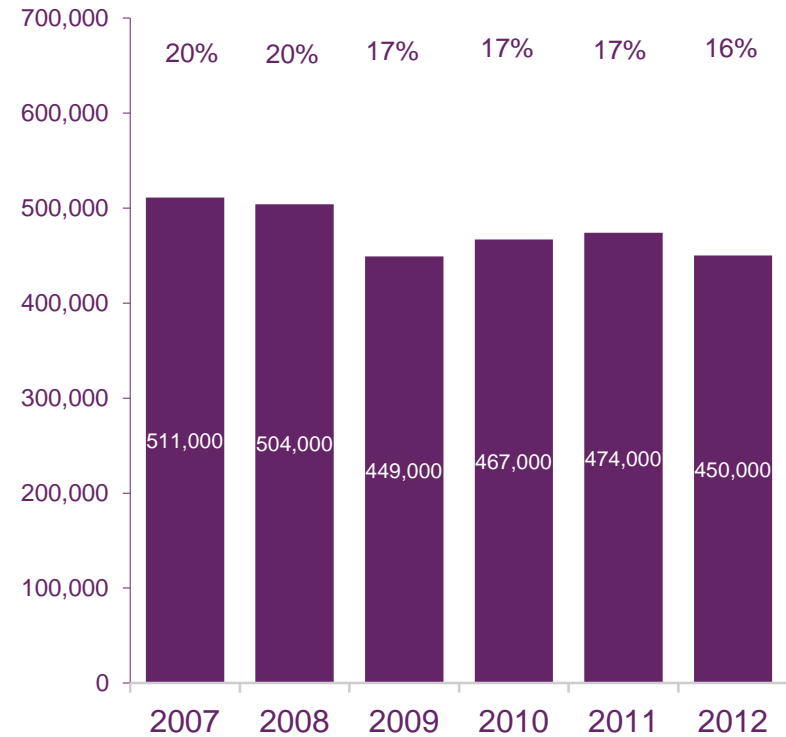
-Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of January/February 2013.

Fig 70 Viewing of Welsh language output on S4C, 2007 - 2012

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 71 Share of viewing in Wales, all viewers, all hours and peak time, 2007 - 2012

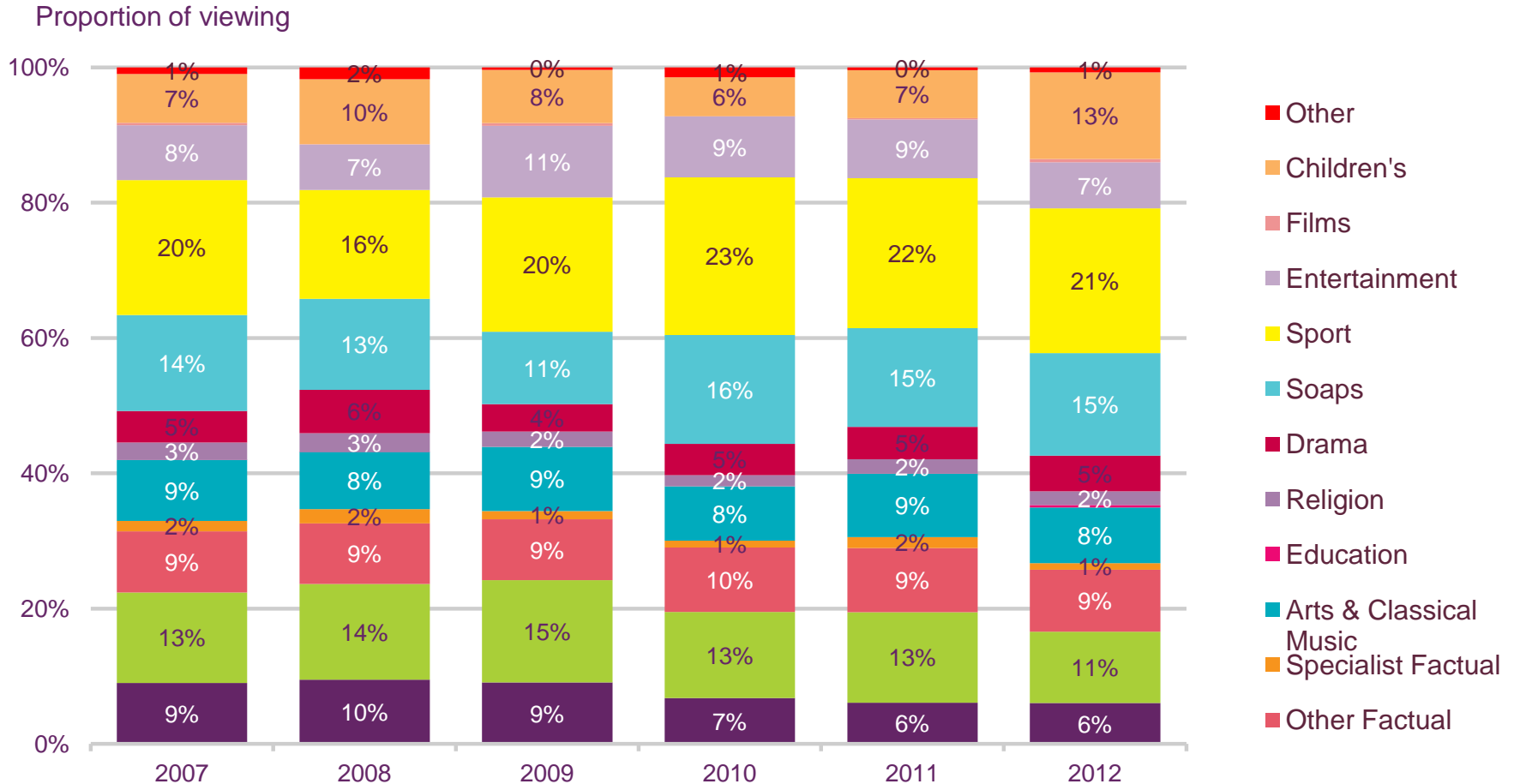
	Share (%)	
	All Hours (0600-3000)	Peak Time (1800-2230)
2007	3.0%	2.9%
2008	2.7%	2.9%
2009	2.2%	2.6%
2010 *	1.3%	1.9%
2011 *	1.3%	2.0%
2012 *	1.2%	1.7%

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 ITV 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 72 Proportion of viewing of genres on S4C, 2012



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