

C – PSB Viewing

PSB Report 2011 – Information pack
July 2011

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Background and notes

- This document reports industry recognised television viewing figures provided by BARB (Broadcasters' Audience Research Board) - a panel of 5,100 homes providing TV measurement for the industry.
- **In 2010 a new BARB panel was introduced. The effect of this is data pre and post 2010 are based on different viewer panels and refined geographic boundaries were introduced. As a result, data comparisons pre and post 2010 should be considered with caution.**
- Changes to the BARB reporting system in 2010 now also allow broadcasters to retrospectively amend the genre labelling of broadcasts they have aired. These changes will apply to all historic data for respective programmes/films. The effect of this is analysis within this report is based on a snapshot of data at a given point in time (i.e. when analysis was conducted). All analysis is based on data as of April/May/June 2011. *(Note: The BARB viewing figures use different datasets to the output figures in information pack C, which have slightly different programme classifications. The main differences are described in the Background and Methodology appendix).*
- Unless stated all analysis is based on whole days. Peak time is defined as 6pm to 10.30pm.
- Analysis focuses on viewing of the following PSB channels; that is BBC One, BBC Two, ITV1, Channel 4, S4C, Five, BBC Three, BBC Four, CBeebies, CBBC, BBC News, BBC Parliament and BBC HD. *(Note: Channel 4 data for 2006-2009 includes S4C viewing. Following DSO in Wales in 2010, Channel 4 data in 2010 relates to viewing to Channel 4 only (i.e. S4C is excluded as it is now a separate channel).*
- The majority of the analysis focuses on total annual viewing hours for genres, which shows the total annual hours of viewing by an average individual (aged 4+) of a given programme genre. Unless indicated, figures show viewing averages for all viewers aged 4+, the standard demographic group for BARB analysis.
- Data is also included on Welsh language programme viewing on S4C.
Note: this data has been provided by S4C rather than produced by Ofcom.

Summary: Overview of hours watched

Note: 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

- While the average hours of total daily TV viewing increased between 2006 (3.6 hours) and 2010 (4 hours), the average hours of daily viewing to all PSB channels remained the same over the same period. It is worth noting the possibility that part of the increase in total viewing is attributable to effects of the BARB panel change (See Figure 1).
- Total TV viewing increased across all age groups between 2006 and 2010 with the exception of viewers aged 25-34 years (whose viewing levels remained flat). The biggest increases in viewing were among the oldest viewers. Over the past five years, data indicates viewing increased 18% for the 55-64 age group and 16% amongst those aged 65+.
- Viewing to PSB channels remained fairly stable between 2006 and 2010; however there were relatively big decreases among viewers aged 16-24 and 25-34, who, in 2010, watched PSB channels on average 13% and 10% less respectively than they did in 2006. Viewing to PSB channels from other age groups remained consistent on the whole.

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

Summary: Overview of weekly reach



Note: 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*

- Weekly reach for all BBC channels increased between 2006 and 2010; while ITV1, Channel 4 and Five all experienced some decline (note: Changes can be possibly part explained by the BARB panel change effects).
- Across the main five PSB channels data indicates BBC One's weekly reach increased from 77% in 2006 to 79% in 2010; BBC Two saw the biggest increase across this period, from 52% to 55%. ITV1 weekly reach marginally declined from 69% to 68%; while Channel 4 suffered the biggest decline – 57% down to 54%. Five's weekly reach also fell from 42% to 40%.
- The average weekly reach of all of the PSB portfolio channels combined** increased from 60% in 2006 to 71% in 2010, however the rate of increase has slowed down significantly in recent years (an increase of 0.8% 2009 to 2010). BBC Three enjoyed the biggest increase, from 17% in 2006 to 23% in 2010 (See Figure 3).
- 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.

* 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' is comprised of the PSBs' affiliated channels. It excludes the main five PSB channels. Portfolio channels include: BBC3, BBC4, BBC HD, BBC News, BBC Parliament, CBBC, CBeebies, ITV1+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, GMTV total, CH4+1, 4Music, E4 Total, More4 Total, Film4 Total, 5* Total, 5 USA Total.

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

Overview of hours watched and reach



Fig 1 Average hours of daily viewing, Total TV, 2006-2010



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

Average hours of viewing per day, Total TV (all TV channels)

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

Overview of hours watched and reach



Fig 2 Average hours of daily viewing, PSB channels, 2006-2010



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

Average hours of viewing per day, PSB channels (BBC One, BBC Two, ITV1, C4, S4C, Five, BBC Three, BBC Four, BBC HD, BBC News, BBC Parliament, Cbeebies, CBBC).

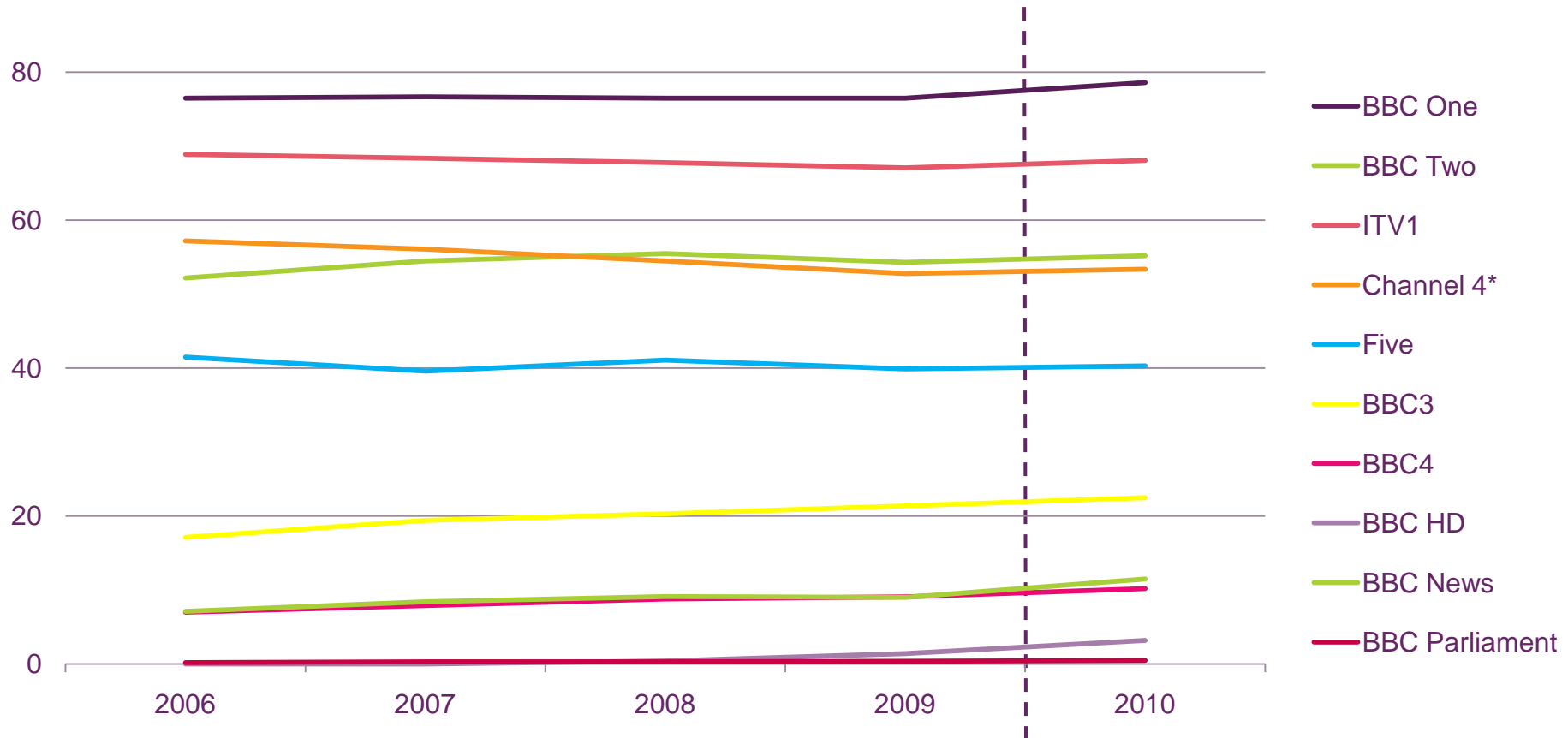
Note: New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Overview of hours watched and reach



Fig 3 Average weekly reach of PSB channels, 2006-2010

15+ consecutive minute weekly reach (%)



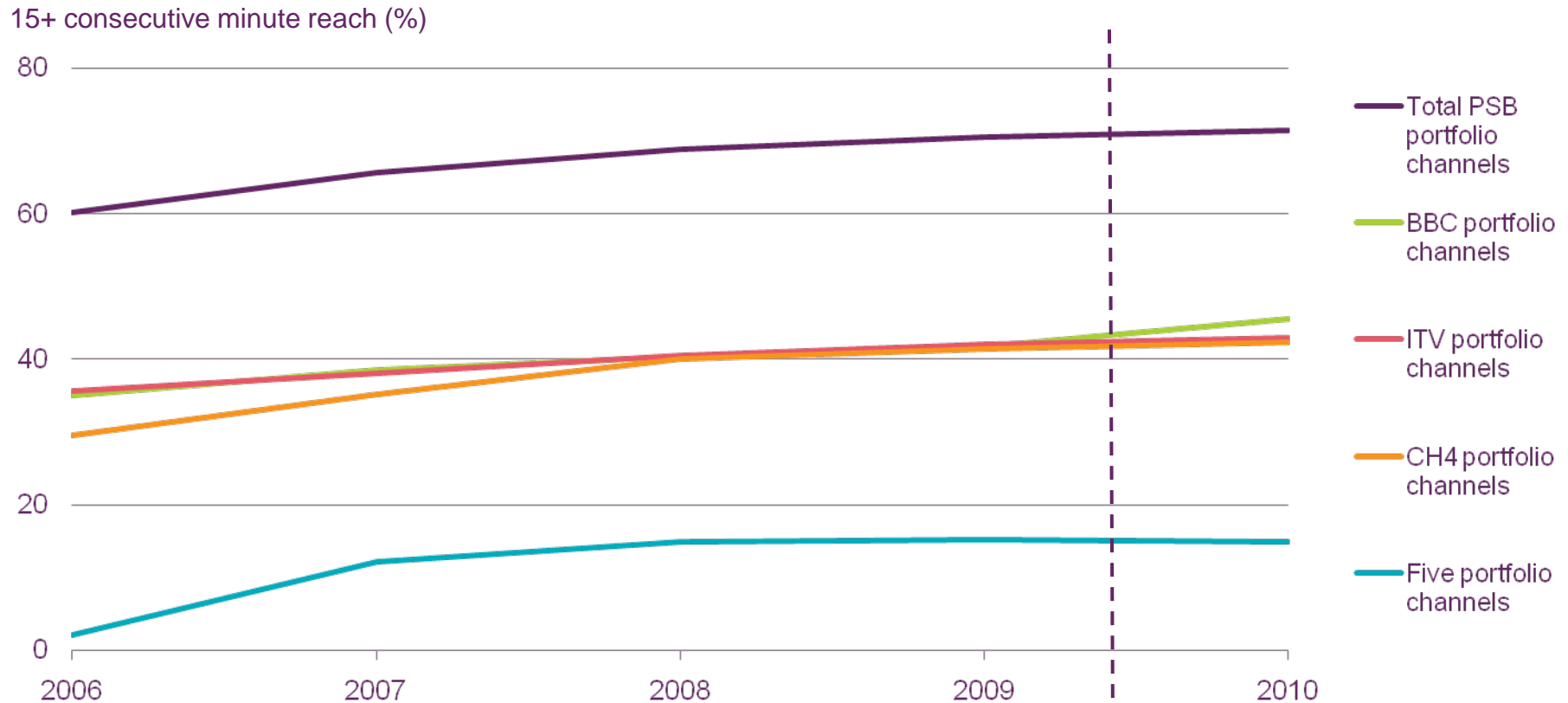
Source: BARB. 2006-2009 = Multichannel homes; 2010 = all homes.

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

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

* C4 2006-09 includes S4C; in 2010 it is excluded as S4C became a separate channel following DSO in Wales. S4C weekly reach 2010 = 0.7%.

Fig 4 Average weekly reach of PSB portfolio channels, 2006 - 2010



Source: BARB. BARB, 2006-2009 = Multichannel homes; 2010 = all homes. Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used.

Note: i) 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.

ii) New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line). Portfolio channels include: BBC3, BBC4, BBC HD, BBC News, BBC Parliament, CBBC, Cbeebies, ITV1+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, GMTV Total, CH4+1, 4Music, E4 Total, More4 Total, Film4 Total, 5* Total, 5 USA Total



Summary: Overview of share

Note: 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.

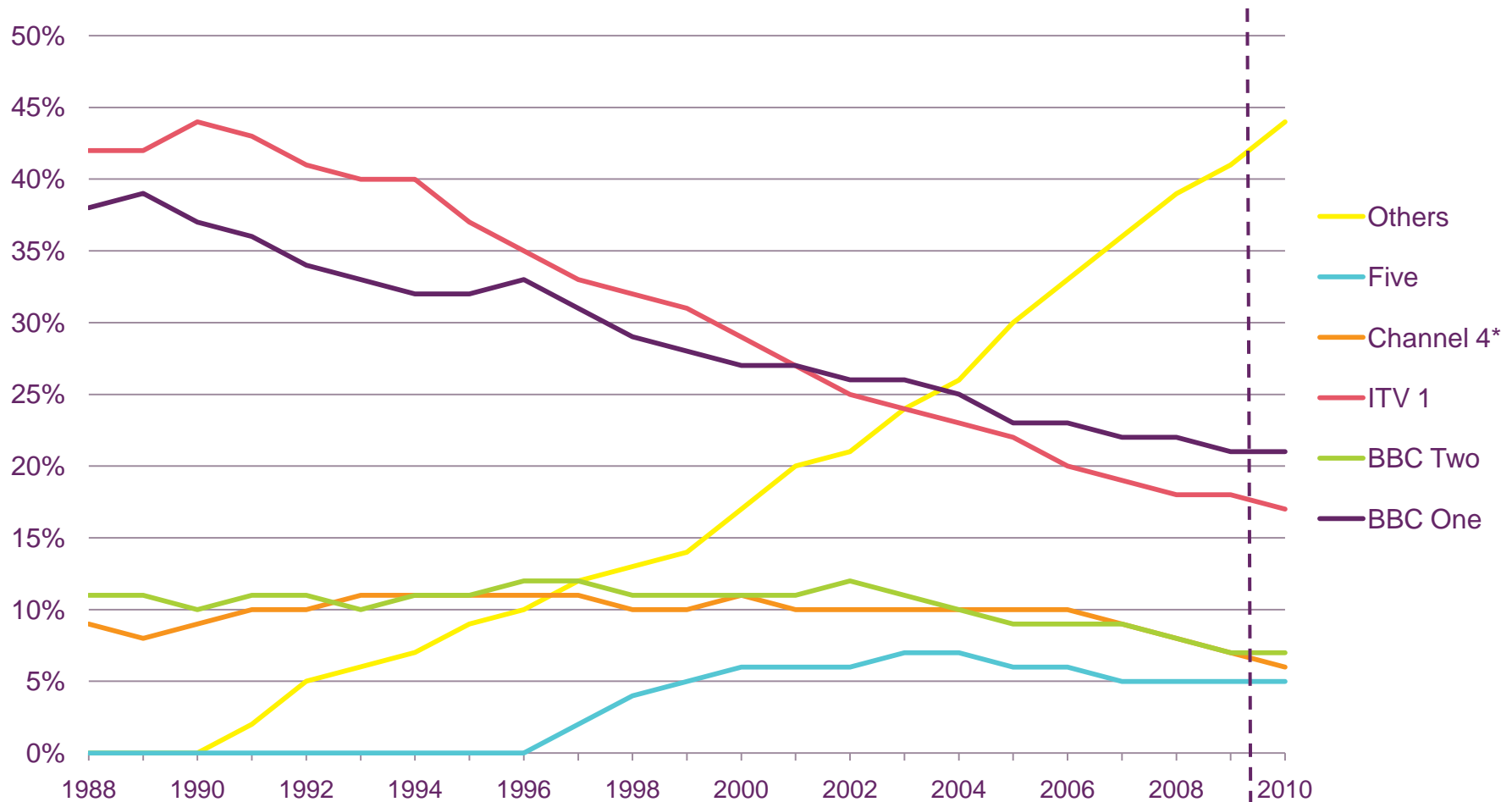
- The combined share* of the main five PSB channels in all homes continued to decline in 2010, by 3% from 2009 to 55% in 2010. Each of the main five PSBs saw their share either remain flat or decrease by less than 1% from 2009 to 2010 (See Figure 5).
- Similarly, within peak time (18:00-22:30), all of the main five PSB channels saw their shares either remain flat or decline by less than 1% from 2009 to 2010. (See Figure 6).
- The main five PSB channels continue to retain a relatively stronger presence in Freeview only homes than they do in homes with cable and/or satellite only (64% share vs. 44% share, respectively in 2010). However, the driving force behind the longer-term decline in their combined shares across all homes occurred most notably in Freeview only homes, where combined share has dropped by 11% from 2006 to 2010**. In homes with cable and/or satellite only, the combined share has fallen by a lesser degree; 5% since 2006 (See Figure 7).
- Among multichannel viewers, there was a decrease in combined share of the main five PSBs from 58% in 2006 to 54% in 2010. This decline, however, was offset by an increase in combined share of respective PSB multichannels from 12% in 2006 to 18% in 2010. Each of the PSBs saw their portfolio shares increase by either 1% or 2% over this period. As a result, PSB channels saw their total combined shares actually increase from 69% to 72%. Ergo, despite a significant increase in the number of channels broadcasting, share of other multichannels decreased from 31% to 28% across the same period (See Figure 8.)

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

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

***Portfolio channels' is comprised of the PSBs' affiliated channels. It excludes the main five PSB channels. Portfolio channels include: BBC3, BBC4, BBC HD, BBC News, BBC Parliament, CBBC, Cbeebies, ITV1+1, ITV2 Total, ITV3 Total, ITV4 Total, CITV, GMTV total, CH4+1, 4Music, E4 Total, More4 Total, Film4 Total, 5* Total, 5 USA Total. The actual number of channels that make up the PSB portfolios has increased over the years, and the proportion of people with multichannel television has also grown substantially year on year.

Fig 5 All day channel shares in all homes, 1988 – 2010

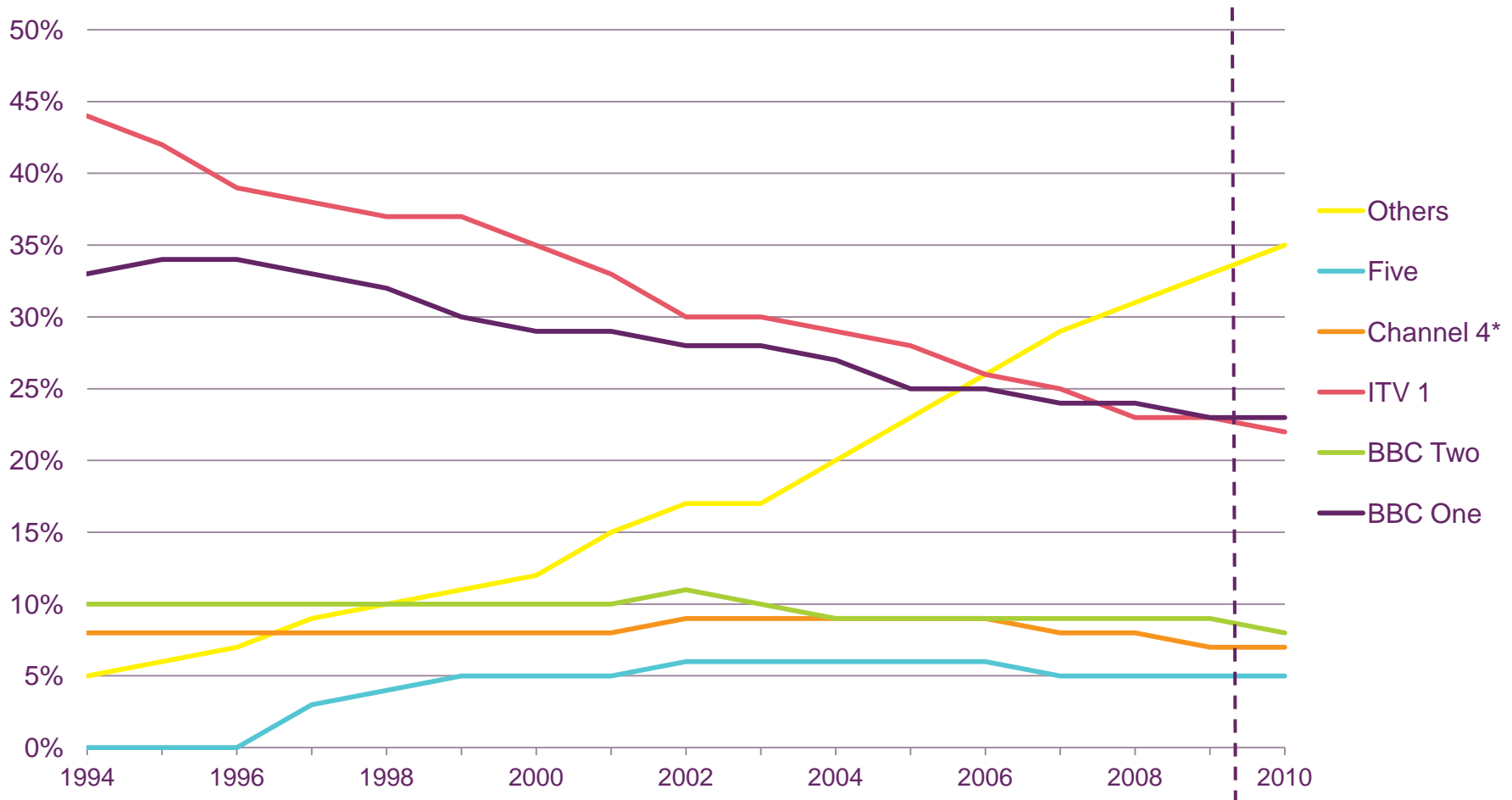


Source: BARB, All homes.

Notes: i) New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution (see dotted line).
 ii) C4+1 average share in 2010 = 0.8%. (ITV1 +1 = 0%).

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

Fig 6 Peak time channel share in all homes, 1994 - 2010



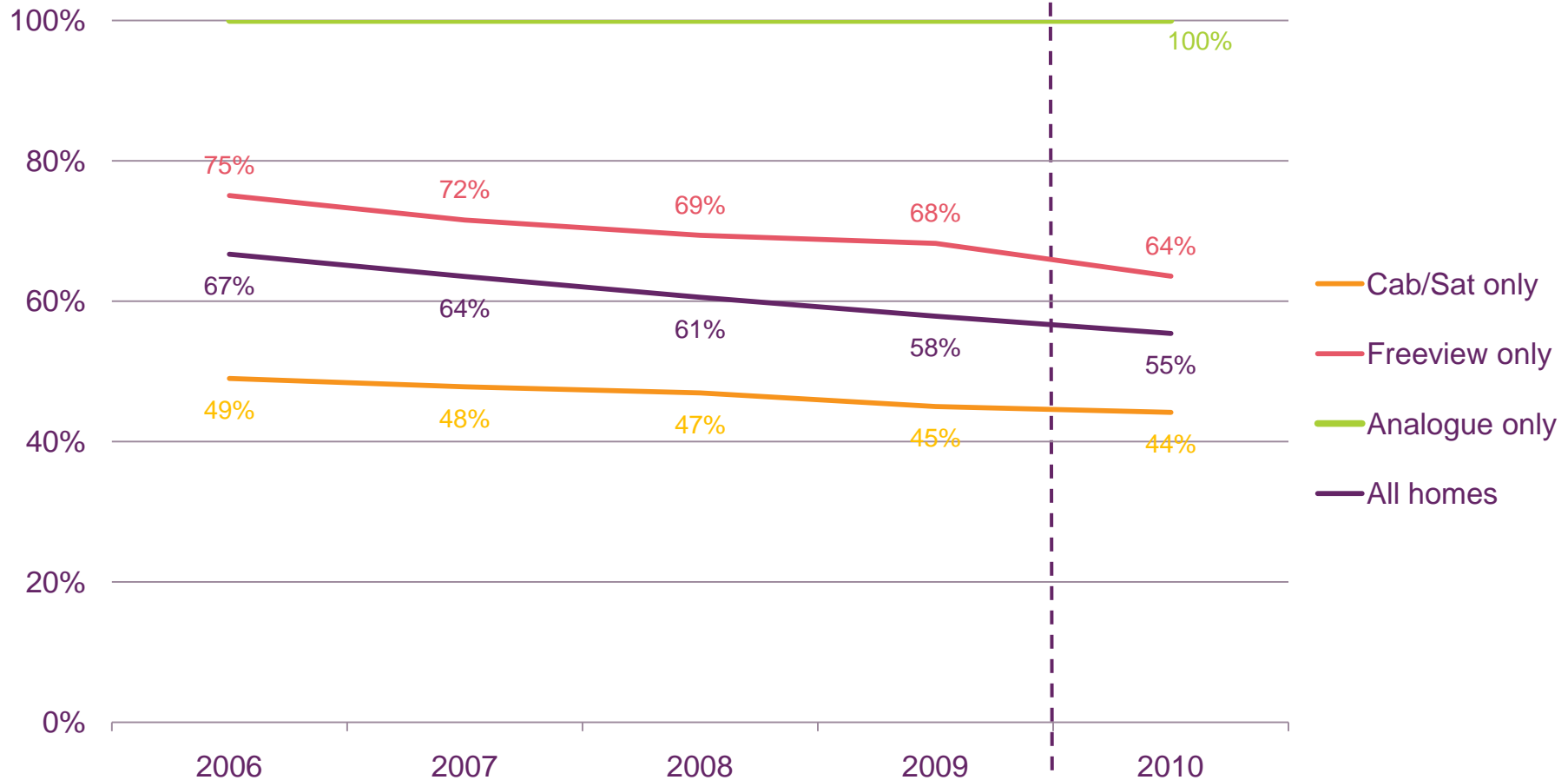
Source: BARB, All homes. Peak time = 18:00-22:30

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

ii) C4+1 average share in 2010 = 0.7%. (ITV1 +1 = 0%).

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

Fig 7 Main five PSB channels' share in homes with different television platforms, all day



Source: BARB, Main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

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

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



Fig 8 Shares in multichannel homes, 2006-2010



Source: BARB, 2006-2009 = All individuals, multichannel universe; 2010 = All individuals in multichannel homes, network universe. Portfolio channels are the PSB channels, excluding the main 5 PSB channels. 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.

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

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

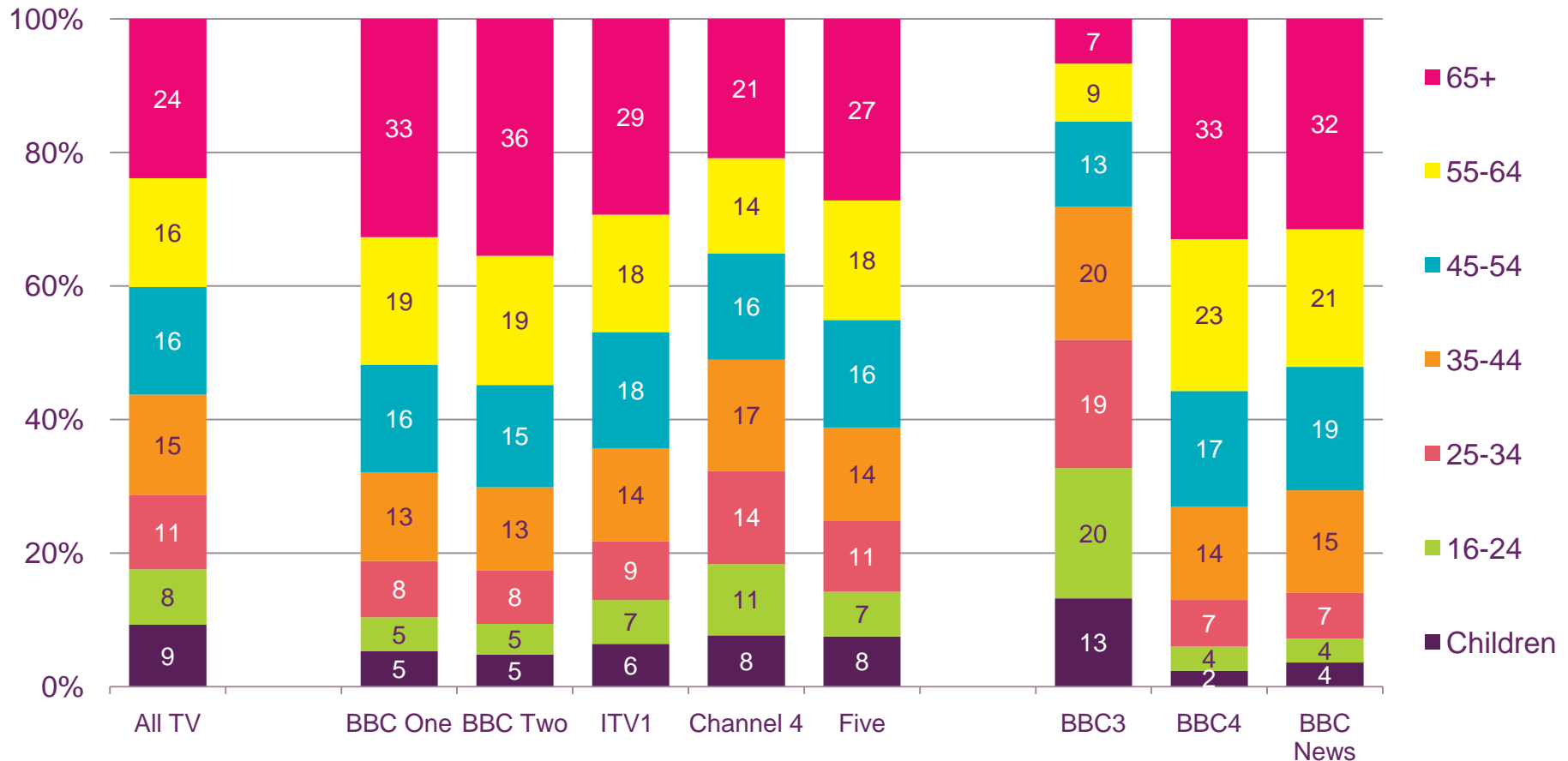


Summary: Audience profiles

- All of the main five PSB channels, except for Channel 4, had a viewing profile older than the average profile of the total TV audience in 2010. The two BBC channels had the oldest viewing profiles (as has been the case historically); viewing that came from viewers aged 55 or older stood at 54% for BBC Two, and 52% for BBC One.
- For ITV1, viewing from viewers aged 55 or older stood at 47% and for Five 45% – meaning four of the main five PSB channels had an older viewing profile than the average across All TV (40%). Conversely, viewers aged 55 or older accounted for 35% of Channel 4's audience, which had a markedly younger profile. One quarter (25%) of it's audience came from viewers aged 16-34, compared to the All TV average of 19%, and more than for each of the other main PSBs (See Figure 9).
- BBC News and BBC Four also tended to attract an older audience; 53% of BBC New's audience fell in to the 55+ age group in 2010, while for BBC Four it was 56%.
- BBC Three had a much younger audience profile with 39% of its audience coming from viewers aged 16 – 34, compared to a corresponding 19% average across the total TV audience. BBC Three's profile in particular was considerably different to that of the other PSB channels.
- Across All TV, 58% of viewing came from viewers in the C2DE socio-economic group in 2010. All of the PSB channels, with the exception of BBC Four, attracted the majority of it's viewing from viewers in the C2DE group. In terms of the main five PSBs, ITV1 and Five's viewing profiles most noticeably had a skew towards C2DE group viewing (62% and 64% respectively). Viewing from the ABC1 socio-economic group accounted for the greatest proportion of BBC Four's profile (55% respectively). This was the only PSB channel for which the majority of viewing came from viewers in the ABC1 group (See Figure 10).

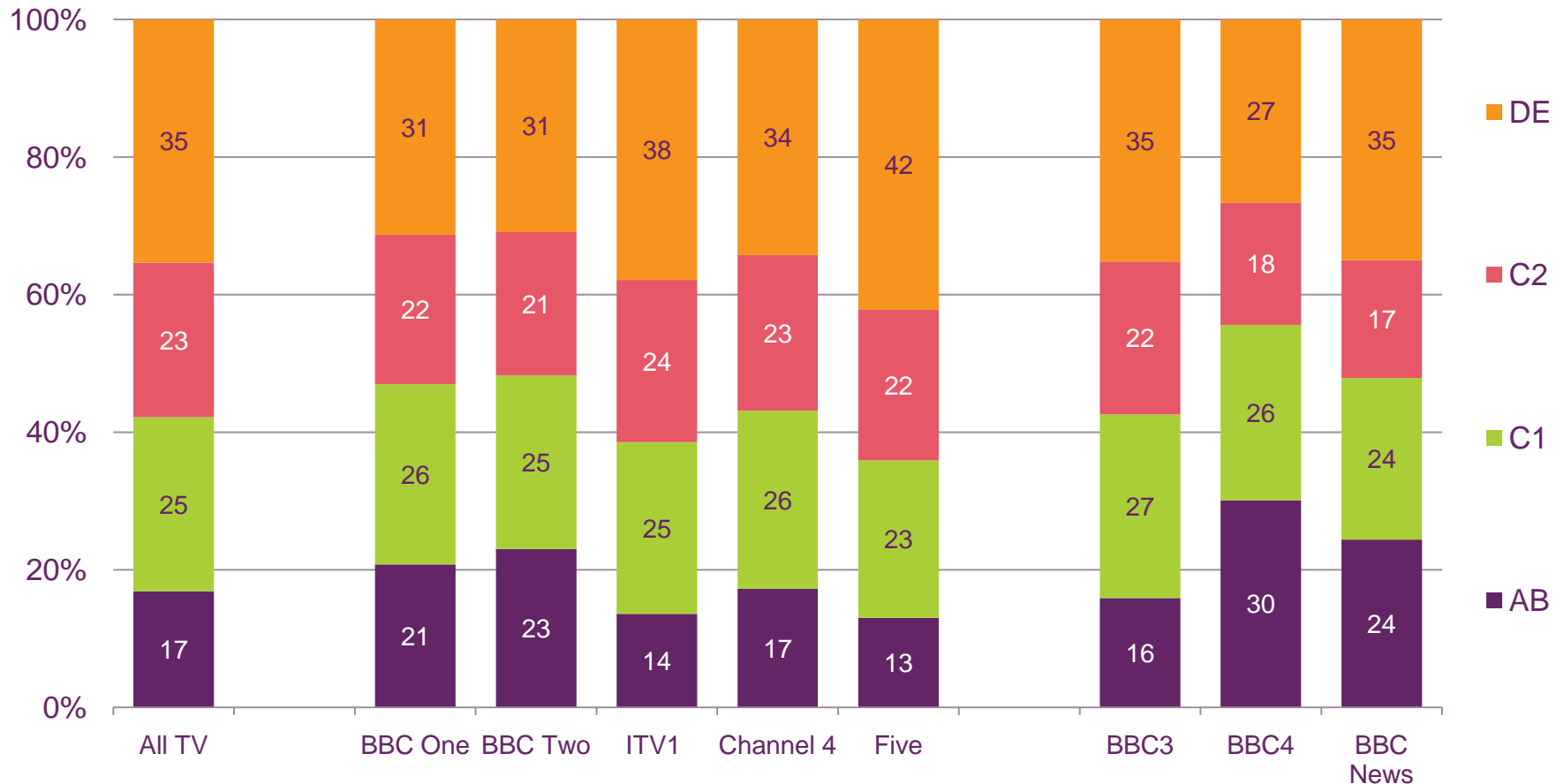
Note: Due to low audience figures, profiles for BBC HD and BBC Parliament are not spilt out in this year's report.

Fig 9 Age profile of channel viewers, 2010



Source: BARB. All homes. Note – due to low audience figures profiles have not been included for BBC HD and BBC Parliament. Profile data calculated on a base of all individuals 4+

Fig 10 Socio-economic profile of channel viewers, 2010



Source: BARB. All homes. Note – due to low audience figures profiles have not been included for BBC HD and BBC Parliament. Profile data calculated on a base of all individuals 4+

Summary: Non-linear viewing via time-shifting



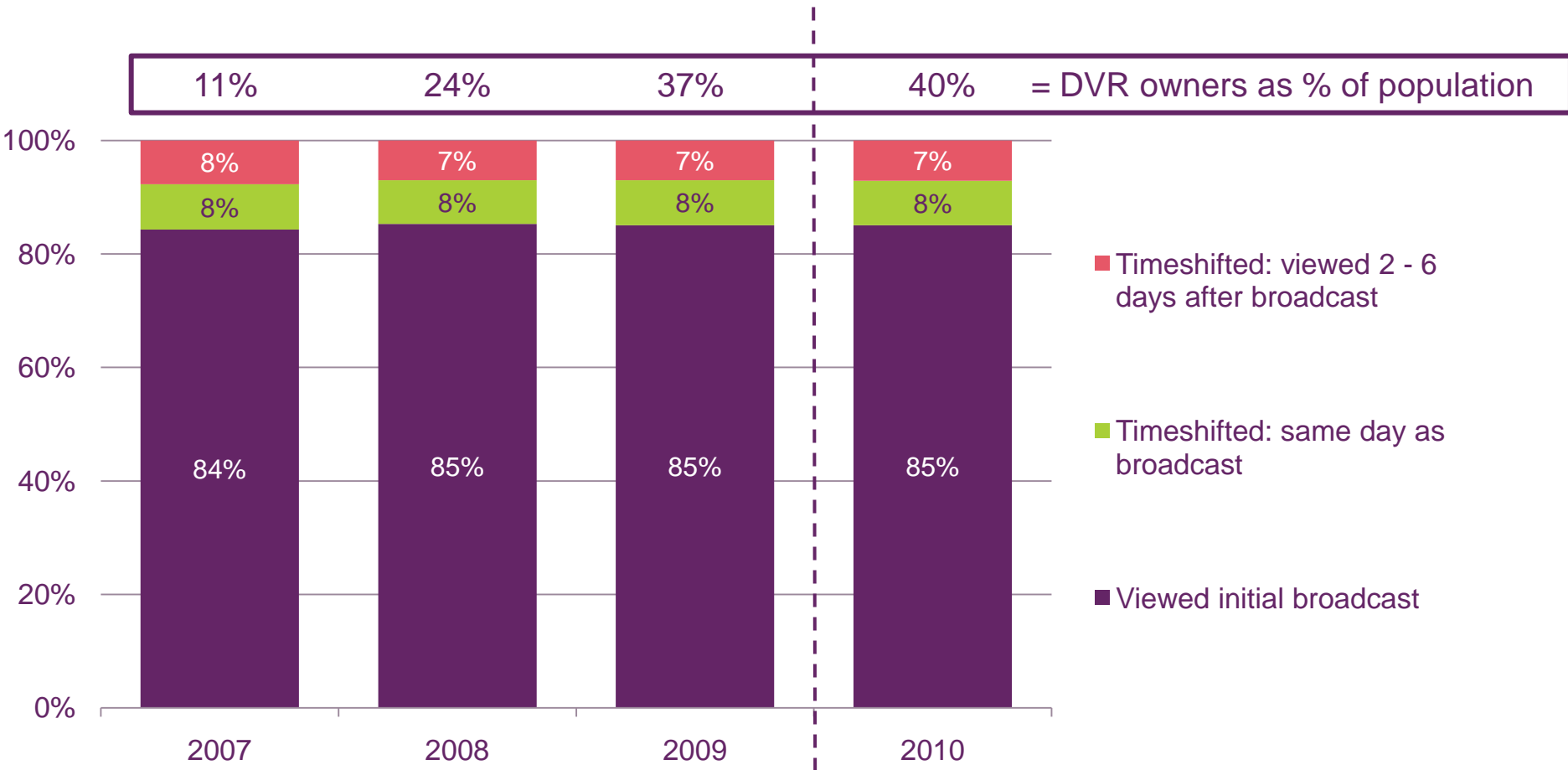
Note: A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- This section looks at the proportion of viewing that was time-shifted in 2010 among all individuals with Digital Video Recorders (DVRs). Time-shifted viewing is defined in BARB analysis as viewing of programmes recorded and subsequently played back within seven days, as well as viewing after pausing or rewinding live TV. Viewing outside the seven day window is not measured, so it is likely reported time-shifted viewing is lower than in reality.
 - Looking across all individuals (i.e. those who do and do not have DVRs) the overall proportion of timeshifted viewing to the main five PSBs was 7% in 2010, having increased from 3% in 2007. This increase is likely in large part to be a result of the increase in ownership of DVR devices alongside multichannel penetration growth.
 - 15% of all viewing to the main five PSB channels amongst all individuals with DVRs (40% of the population) was time-shifted in 2010; this has remained stable since 2007 (when it was marginally higher at 16%) (Figure D33). This 15% was marginally higher than the average proportion of viewing timeshifted across all TV in 2010 (14%).
 - Similar to previous years, in 2010 over half (52%) of measured time-shifted viewing to the main PSB channels was played back the same day as recorded (note: this figure includes viewing to programmes viewed after pausing or rewinding live television).
 - Among individuals with DVRs the proportion of total timeshifted viewing varies by channel. One-fifth of all viewing to Channel 4 in 2010 was timeshifted. This was the highest proportion across the main five PSBs, followed closely by Five (18% timeshifted). Timeshifted viewing represented 14% of viewing on each BBC One, BBC Two and ITV1.
 - Within timeshifted viewing, a greater proportion was on the same day as broadcast on BBC One and ITV1. Viewing between 2 and 6 days after broadcast was more common on BBC Two, Channel 4 and Five.
- * 2007 was the first full year DVR use across all platforms was recorded, therefore data pre-2007 is not reported.

Non-linear viewing via time-shifting



Fig 11 Proportion of Live vs. time-shifted viewing, main five PSB channels, 2007-2010



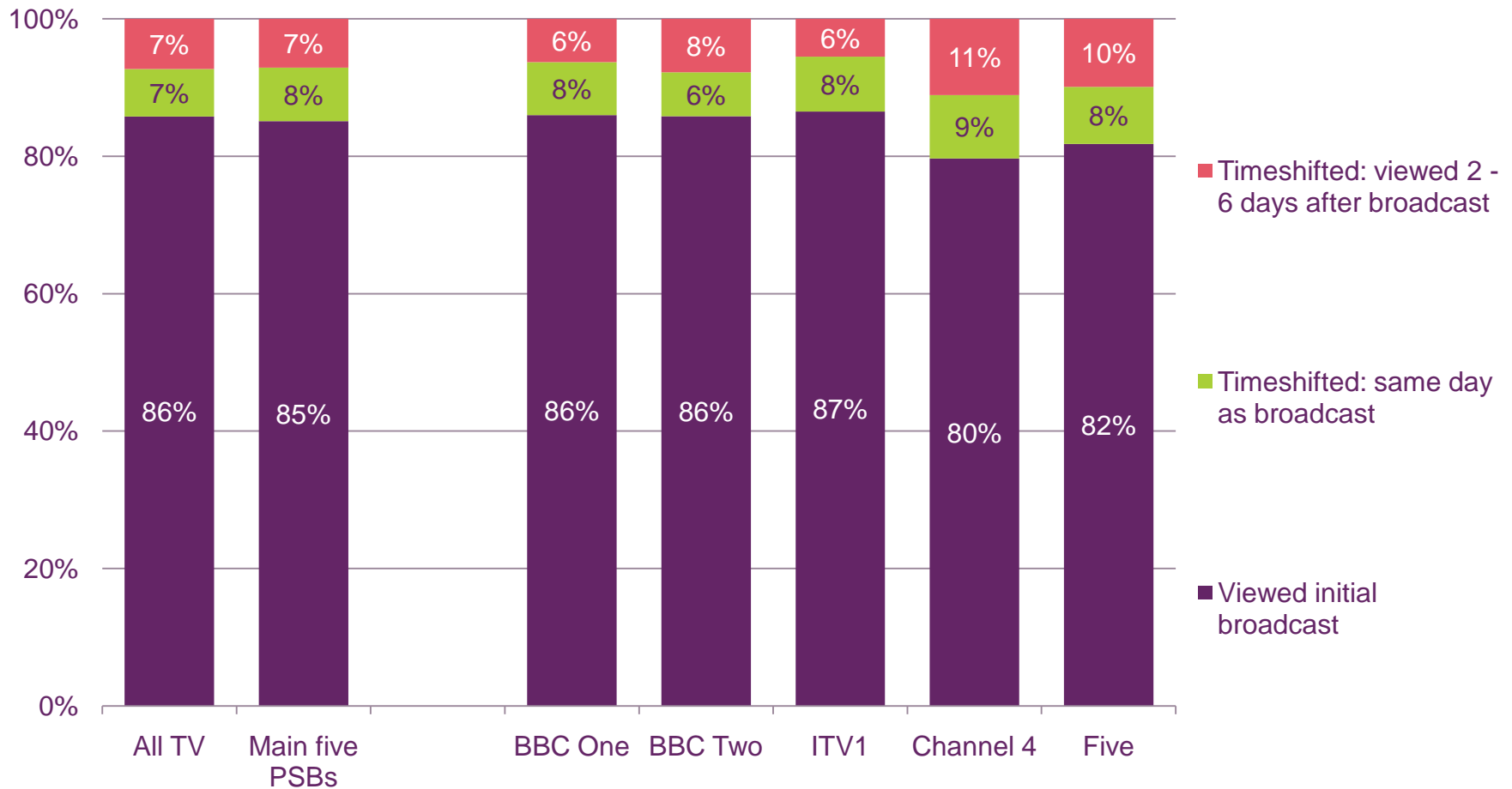
Source: BARB, 2007-2009 = Multichannel homes; 2010 = all homes. **All DVR owners**

Notes: i) New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).
 ii) 2007 was first full year DVR use over all platforms was recorded. Therefore data before 2007 not included.

Non-linear viewing via time-shifting



Fig 12 Proportion of Live vs. time-shifted viewing by channel, main five PSB channels, 2010



Source: BARB, All homes. **All DVR owners.**

Note: In 2010, 'DVR owners' represented 40% of the population

Viewing of range of programmes: over time

Summary: Viewing of range of programmes



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

- On the main five PSB channels, the proportion of viewing to different programme genres remained fairly similar in 2010 compared to 2006. Viewing to the Other Factual genre increased from 15% of total viewing in 2006 to 18% in 2010, to become the most viewed genre, creeping ahead of Entertainment (also around 18% in 2010, marginally increasing from 17% in 2006). The only other genres where proportions notably increased were Current Affairs, 4% to 7%, and National News/Weather, increasing from 11% to 12% (See Figure 13).
(Note: viewing to News and Current Affairs in 2010 is likely to have been influenced by events relating to the election)
- Compared to 2006 viewing profiles, the proportion of total viewing, on the main five PSB channels, remained at the same level for Sport (10%) and Specialist Factual programming (4%) in 2010. There were, however, decreases for Drama (13% to 11%), Soaps (11% to 9%), Films (9% to 8%) and Children's programming (2% to 1%).
- In terms of peak time (18:00-22:30) viewing to the main five PSB channels, the genre viewing profile was broadly similar to that of average viewing to these channels across the whole day. Proportion of viewing to Entertainment programming rose from 15% in 2006 to 19% in 2010, becoming the most viewed genre in 2010. There were also increases in viewing to National News/Weather (8% to 9%), Specialist Factual (5% to 6%) and Current Affairs (3% to 5%). (See Figure 14).
- The biggest change seen was the decrease in viewing to Drama, 19% in 2006 (then the most viewed genre) to 15% in 2010. There were also decreases to Other Factual, despite being the most viewed genre across all day in 2010 (17% to 16%); to Soaps (16% to 14%), Sport (9% to 8%) and Films (7% to 6%).

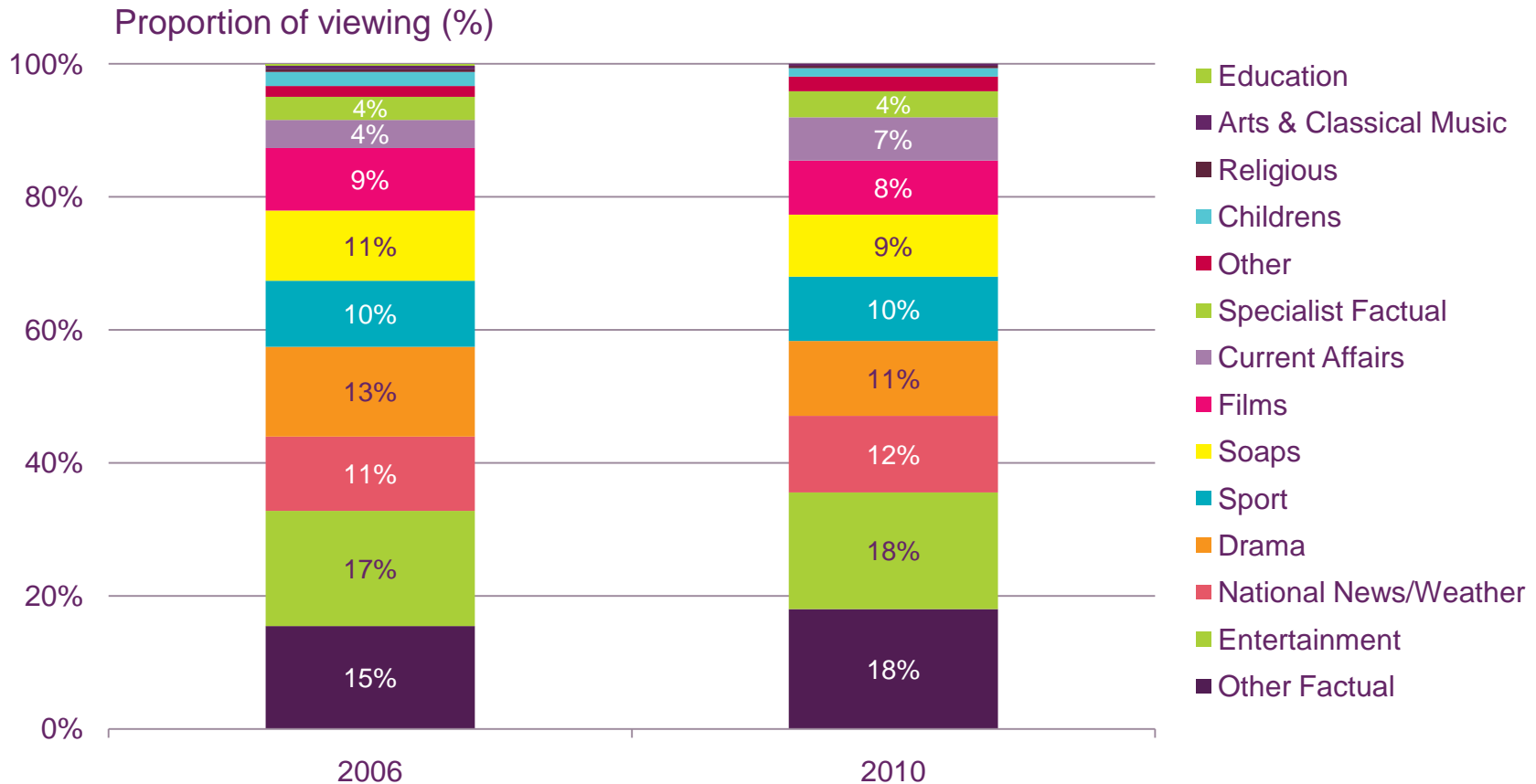
Note:

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 April/May 2011.

Viewing of range of programmes: over time



Fig 13 Proportion of viewing of different genres on the main five PSB channels, all homes, 2006 vs. 2010



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

ii) Network viewing - excludes nations/regions programming

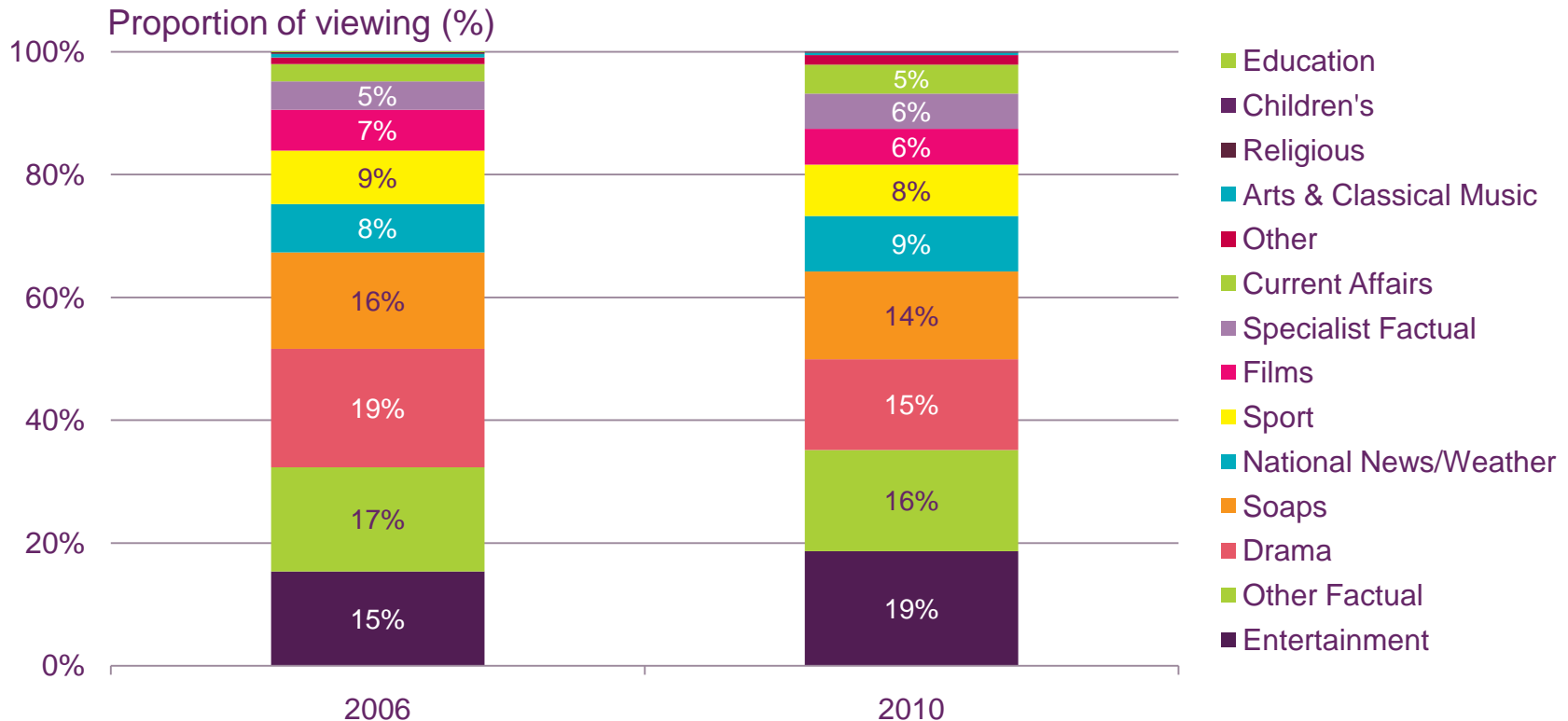
iii) Other includes unassigned broadcasts and Party Political Broadcasts

iv) Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data. C4 data for 2006 includes S4C.

Viewing of range of programmes: over time



Fig 14 Proportion of network viewing of different genres on the main five PSB channels, all homes, 2006 vs. 2010, Peak time (1800-2230)



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five). **Peak time only (1800-2230)**

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

ii) Network viewing excludes nations/regions programming

iii) Other includes unassigned broadcasts and Party Political Broadcasts

iv) Viewing to Children's and Education genres each accounted for 0% of peak viewing in 2006 and 2010

v) Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data. C4 data for 2006 includes S4C.

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

- In 2010, the programme genre profile for each of the main five PSB channels across the whole day differed greatly (See Figure 15):
 - **BBC One:** National News/Weather accounted for over a fifth (22%) of viewing, the highest contributing genre and double the average across all main five PSB channels. Viewing from Current Affairs programming accounted for 11%, significantly higher than for any of the other main PSB channels.
 - **BBC Two:** Specialist Factual delivered 11% of viewing, while viewing to Sport 19%. Both of these levels were relatively higher than for any of the other main PSB channels. The higher proportion of viewing to Sport could be part explained by the channel's broadcasting of World Cup football highlights and the atypical broadcasting of Wimbledon tennis - usually seen on BBC One but due to the football being covered on BBC One coverage was moved to BBC Two.
 - **ITV1:** Entertainment delivered nearly a quarter (24%) of viewing - the channel's biggest genre. Soaps provided nearly a fifth (18%), much higher than on the other channels (next highest was on Five, 9%).
 - **Channel 4:** Other Factual provided 39% of viewing and 26% of viewing came from Entertainment programming – both higher levels than on any of the other channels. .
 - **Five:** Over one quarter (27%) of viewing came from Films, over double the average across all the main PSBs. Just over one fifth (21%) of viewing came from Drama's, nearly double the average across all main PSB channels (11%).

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

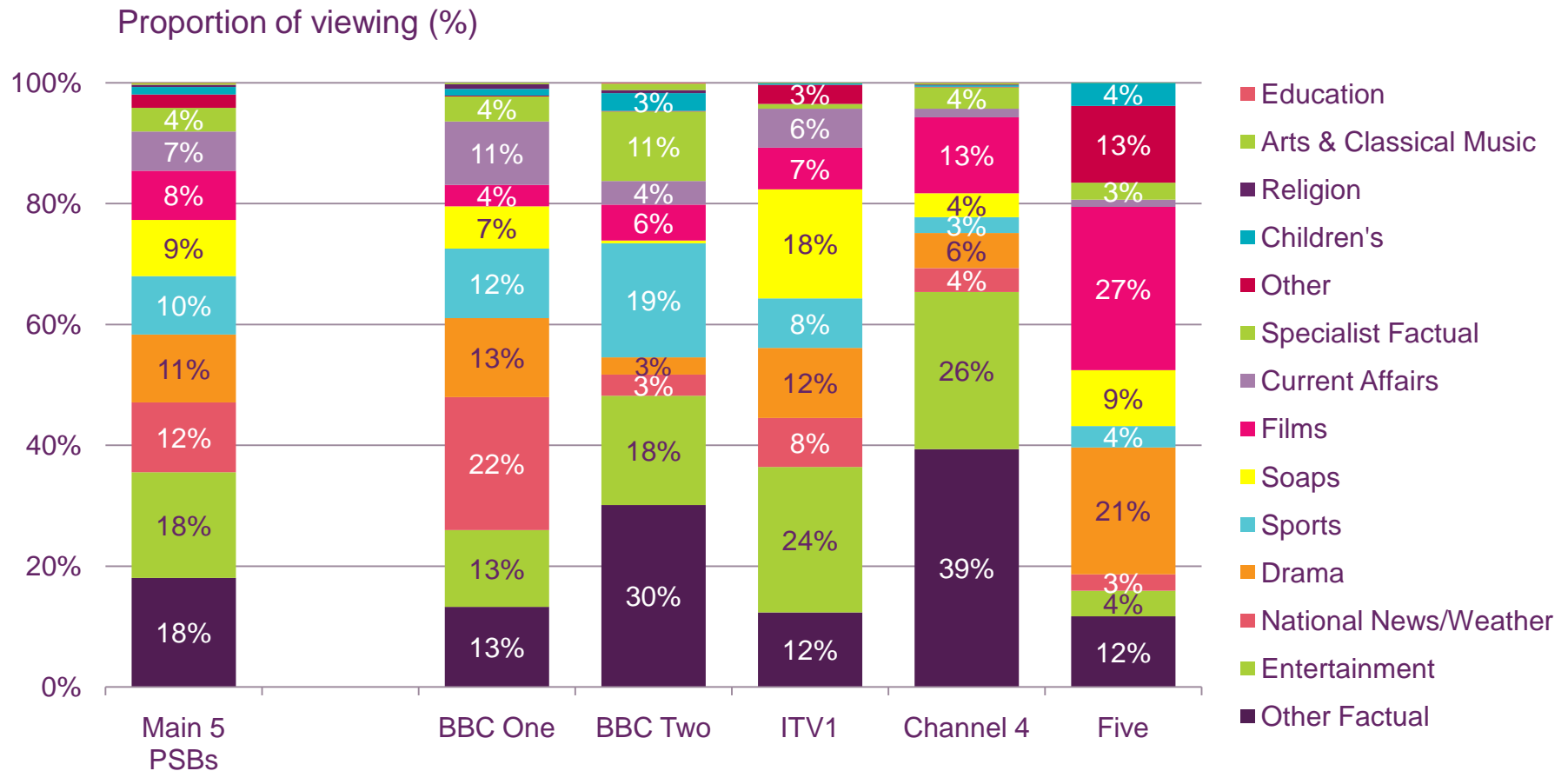


- Figure 16 shows the proportion of viewing of different genres on each of the main five PSB channels in 2010 in peak time (18:00-22:30):
 - **BBC One:** Just over one fifth (21%) of viewing was to Drama, with a further 12% to Soaps. A far higher proportion of the channel's peak time viewing came from News and Weather (15%) and Current Affairs programming (11%) than for any of the other main 5 PSB channels.
 - **BBC Two:** Peak time viewing was dominated by Factual programming. Other Factual provided 30% of peak time viewing, and Specialist Factual provided 18%, both far more than for any other channel. Sport accounted for 18%, again, much higher than for any other channel in peak time, and likely to be influenced by the presence of World Cup football and Wimbledon tennis highlights. While these events were also covered on other channels (i.e. BBC One and ITV1) their relatively high profiles are likely to have had a more telling impact on BBC Two's profile, which usually attracts relatively smaller audiences.
 - **ITV1:** Over one quarter (28%) of peak time viewing came from Soaps and a further quarter from Entertainment. National News/Weather accounted for 9% (second highest behind BBC One, 15%)
 - **Channel 4:** Viewing in peak time was dominated by Other Factual programming (46%). The other relatively notable genre was viewing to Films (12%) – double the average across the main PSB channels
 - **Five:** Drama was the most viewed genre (31%); followed by Films (26%). Both of the proportions for these genres were significantly higher than for any of the other channels. Entertainment accounted for 1% of peak time genre viewing; significantly lower than the 19% average across the main five PSBs.

Viewing of range of programmes: by channel



Fig 15 Proportion of total viewing by channel, main five PSB channels, 2010



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

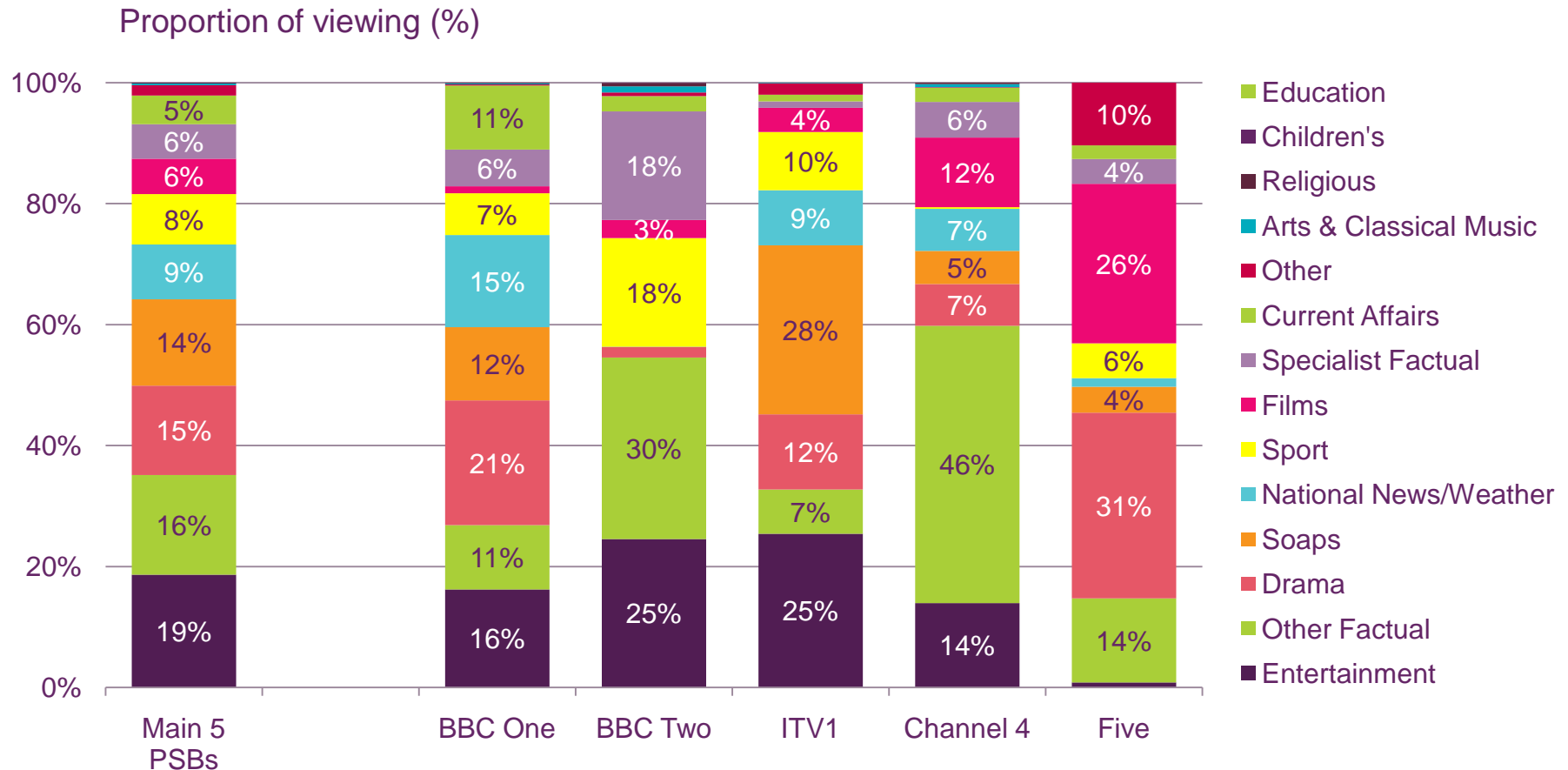
ii) Network viewing - excludes nations/regions programming

iii) Other includes unassigned broadcasts and Party Political Broadcasts

Viewing of range of programmes: by channel



Fig 16 Proportion of total viewing by channel, main five PSB channels, 2010, Peak time (1800-2230)



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five). Peak time only (1800-2230).

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

ii) Network viewing - excludes nations/regions programming

iii) Other includes unassigned broadcasts and Party Political Broadcasts

iv) **Children's and Education genres accounted for 0% of viewing in peak time in both 2006 and 2010**

Summary of viewing to the main five PSB channels, by genre - 2006 vs. 2010



<u>Genre</u>	Average hours (rounded) viewed per week per individual (4+) to the main five PSB channels	
	<u>2006</u>	<u>2010</u>
National News/Weather	91	88
Current Affairs	35	50
Other Factual	126	135
Specialist Factual	29	30
Music	5	4
Arts	4	2
Education	2	0 (0.2)
Religious	3	3
UK Drama	80	68
UK Soaps	74	65
Sport	82	75
UK Sitcom	10	5

Note:

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 April/May 2011.

Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

Note: 2006 data for C4 includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

Top programmes on the main five PSB channels, by genre, 2010



Source: BARB, all homes, all individuals (4+), main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

Note: 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 June 2011.

Summary: UK/National News and Current Affairs; 2006 vs. 2010



Notes:

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 UK/national News (and to a lesser extent Current Affairs) programming can be significantly driven by timely events. In particular, in 2010 the heightened coverage of events surrounding the general election (including the televised party debates) are likely to have had an impact on viewing levels.

- Between 2006 and 2010, viewing to UK News programming on the main five PSB channels has declined from 91 hours a year in 2006 to 88 hours a year in 2010* (see Figure 17):
 - the bulk of decline was in ITV1 viewing, where News viewing dropped by eight hours to a total of 18 hours
 - viewing on BBC One increased from 53 hours in 2006 to 62 hours in 2010
 - BBC Two, Channel 4 and Five each saw a decline of 1 hour in 2010 compared to 2006
- Overall hours of viewing to Current Affairs has increased on the main five PSB channel from 35 hours in 2006 to 50 hours in 2010** (see Figure 18):
 - viewing increases on BBC One (20 to 29 hours) and on ITV1 (9 to 15 hours) were the key factors
 - viewing to the genre on the other main PSB channels has remained relatively small

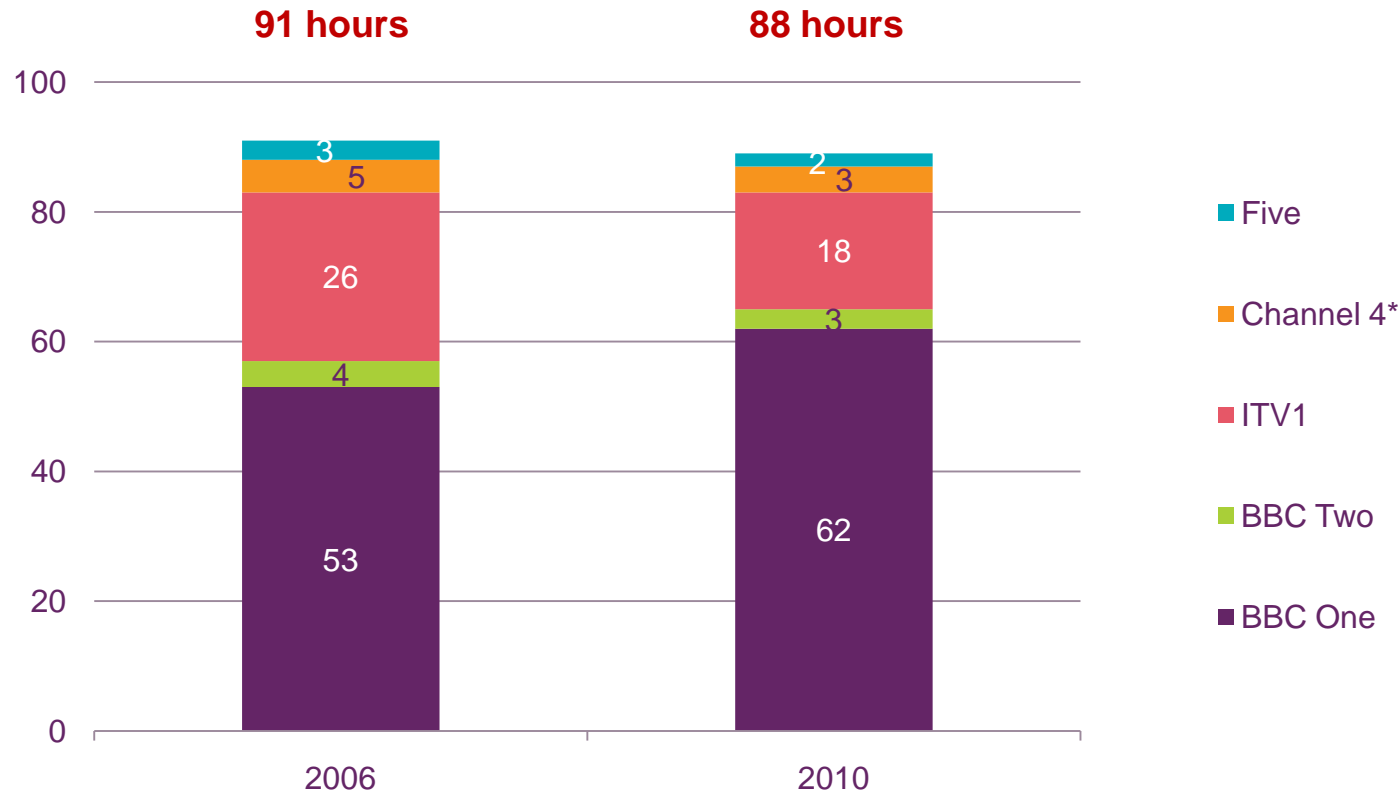
* There was an additional 13.5 hours of UK News viewed on the PSB digital channels (BBC3, BBC4, BBC News, BBC Parliament, BBC HD, CBBC, CBeebies). Nearly all of this was on BBC News (96%).

** There were an additional 2.75 hours of Current Affairs viewed on PSB digital channels in 2010 versus 2006. Most of it on BBC News (67%), with other contributions from BBC Parliament (13%), BBC3 (13%), BBC4 (5%) and BBC HD (2%).

Note: 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 April/May 2011.

Fig 17 Total viewing of UK/National News, all individuals, main five PSB channels only, 2006 vs. 2010

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



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

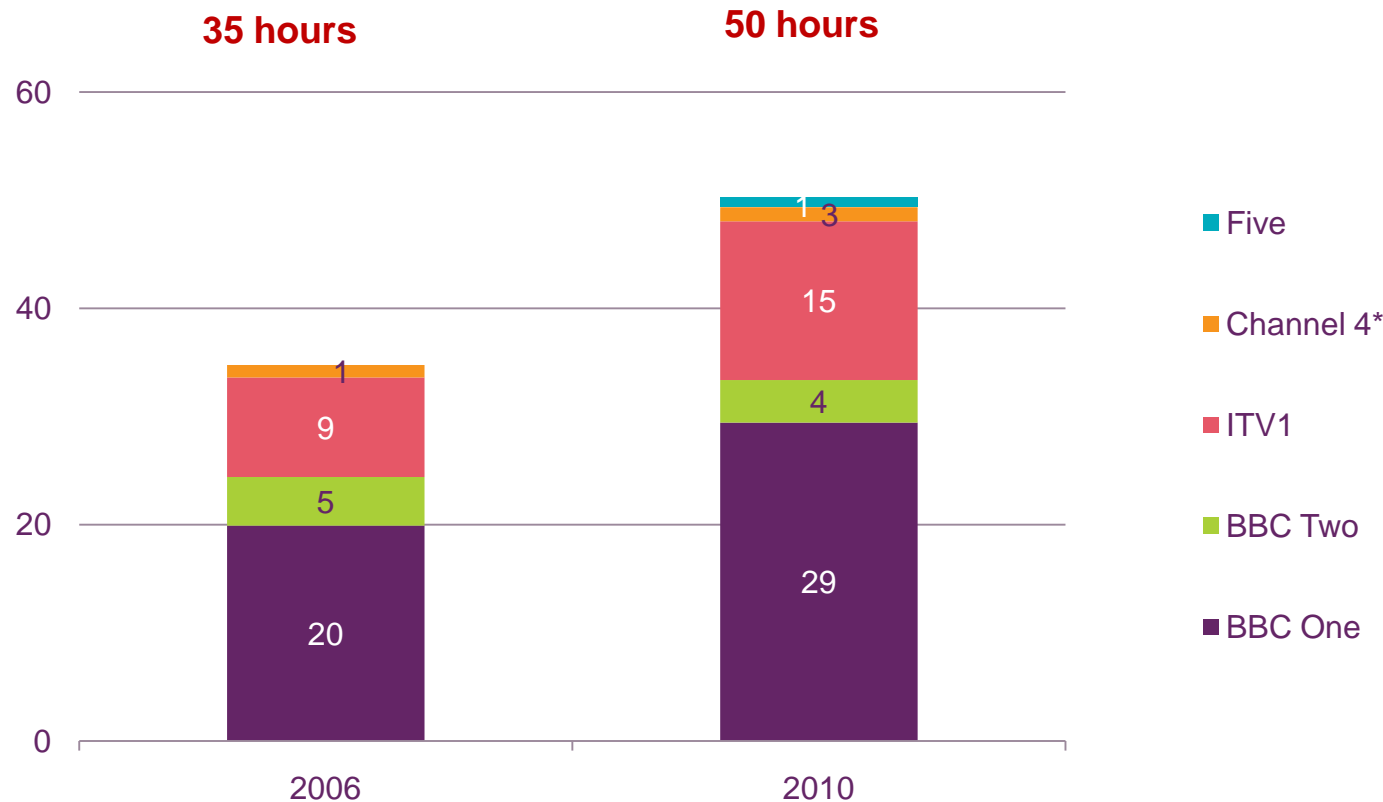
Notes: i) Note: New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

ii) Based on Total minutes of viewing of 'News: National/International genre'

* C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

Fig 18 Total viewing of Current Affairs, all individuals, main five PSB channels only, 2006 vs. 2010

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



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

ii) Based on Total minutes of viewing of 'Current Affairs genre'

* C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

Summary: Nations/regions News (1)



Notes: 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. In particular, in 2010 the heightened media coverage of events surrounding the general election (including the televised party debates) are likely to have had an impact on viewing levels.

- Across the UK in 2010, the average individual watched a total 88 hours of UK News and a total of 28 hours of nations/regions news. Time spent viewing varied by devolved nation and English regions (See Figures 19– 20).
- In the devolved nations in 2010:
 - viewers in Scotland spent more time watching UK/national News programming than in other devolved nations (96 hours). Viewing of nations news (34 hours) was also higher than the UK average of 28 hours.
 - viewing of nations/regions News in Wales (29 hours) was the lowest of the devolved nations, but more than the UK average (28 hours). The average individual watched 84 hours of UK/national News programming.
 - viewers in Northern Ireland spent the least time watching UK/national News (80 hours). In contrast, viewers here spent the most time watching nations/regions News (41 hours), significantly higher than the UK average (28 hours).
- In the English regions in 2010:
 - viewing to UK/national News was joint-highest in the South West and North East (an average of 98 hours per individual) and joint-lowest in the West of England and London* (80 hours).
 - Nations/regions News viewing was highest in the Border region (46 hours) and lowest in London* (19 hours)

* The demographic profile of London is substantially younger than some of the other regions and has a higher proportion of minority ethnic groups; both of these groups consume less television News. Therefore it is likely that the demographics of these regions are influencing the consumption figures for London.

Note: 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 April/May 2011.

Summary: Nations/regions News (2)

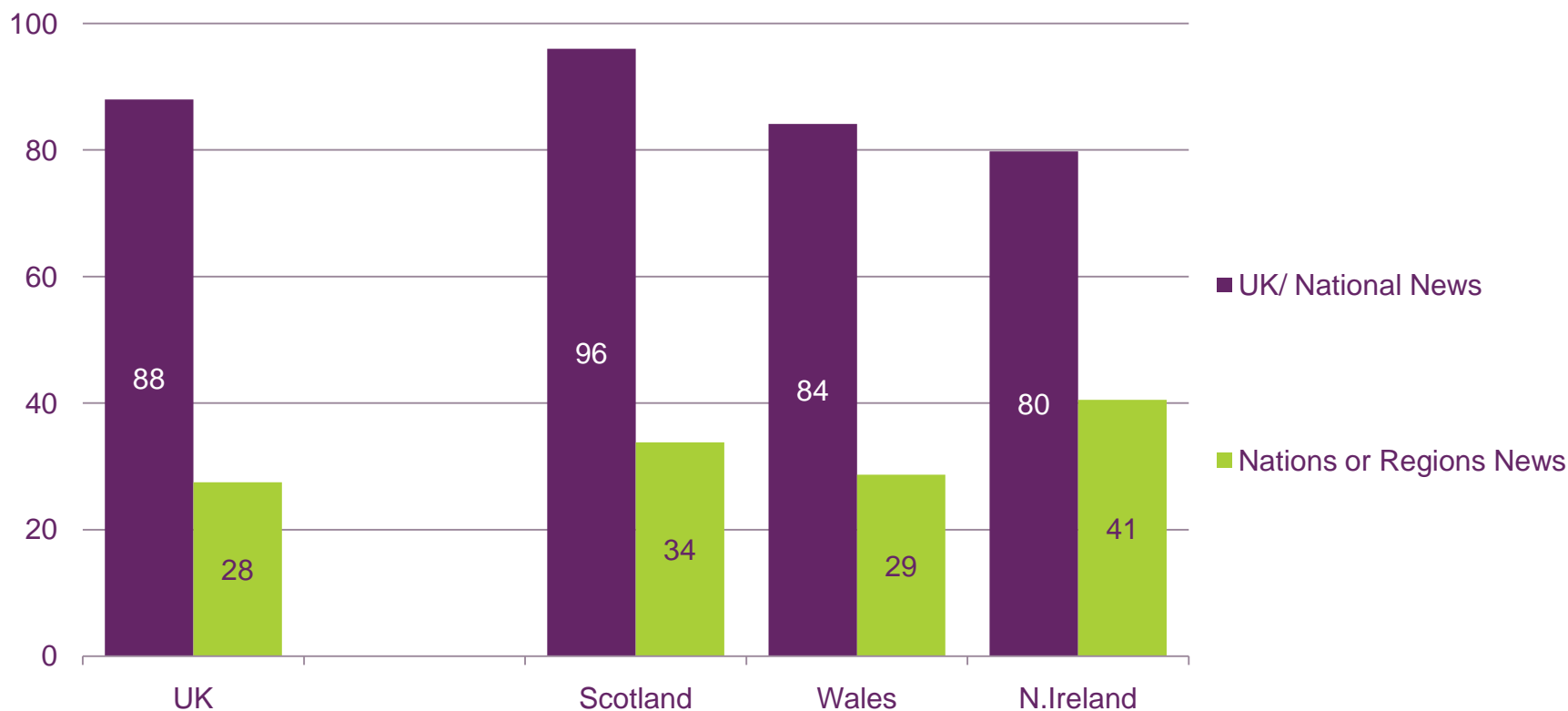


- Between 2006 and 2010, average viewing to nations/regions news programming on the main five PSB channels remained fairly consistent at 28 hours, however there was a marginal decrease from 27.9 to 27.5 hours (Figure 21).
 - viewing to BBC One increased 2 hours - from 16 to 18 hours; while equally decreased from 11 to 9 hours to ITV1
- Looking at the share of viewing of Channel 3 and BBC One evening nations/regions News programmes in 2010 compared to 2006 shows that across the whole of the UK, the average share of the main weekday evening nations/regions News fell by 2% on Channel 3 and fell by 1% on BBC One (See Figures 21 – 22).
- In the devolved nations in 2010:
 - on Channel 3, share was down 2% in Northern Ireland, but increased in both Scotland (by 1%) and in Wales (by 2%) compared with share in 2006.
 - on BBC One, share increased by 1% in Northern Ireland, remained flat in Scotland but decreased by 8% in Wales.
- In the English regions in 2010:
 - on Channel 3, there have been declines in several regions compared with 2006. Share dropped by 6% in the East of England, and by 5% in Meridian, the North West, and in the Midlands. There was an increase in share compared with 2006 in three regions - Border (where share grew significantly by 13%), in the North East, by 6%, and in the West, 2%.
 - on BBC One, share for the weekday evening regional News has increased or remained stable across every English region compared with 2006 shares. The most notable increases were in Border (12%), South West (also 12%), the West (9%) and Yorkshire (6%).

Note: 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 April/May 2011.

Fig 19 Total hours of viewing of UK/national News and BBC/Channel 3 nations News by nation, 2010

Total hours per year watched by average person



Source: BARB, all Individuals (4+), main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five)

Notes: i) Based on Total minutes of viewing of 'News: National/International' and 'News: Regional News' sub-genres respectively

Fig 20 Total hours of viewing of UK/national News, and BBC/Channel 3 regions News by English region, 2010

Total hours per year watched by average person

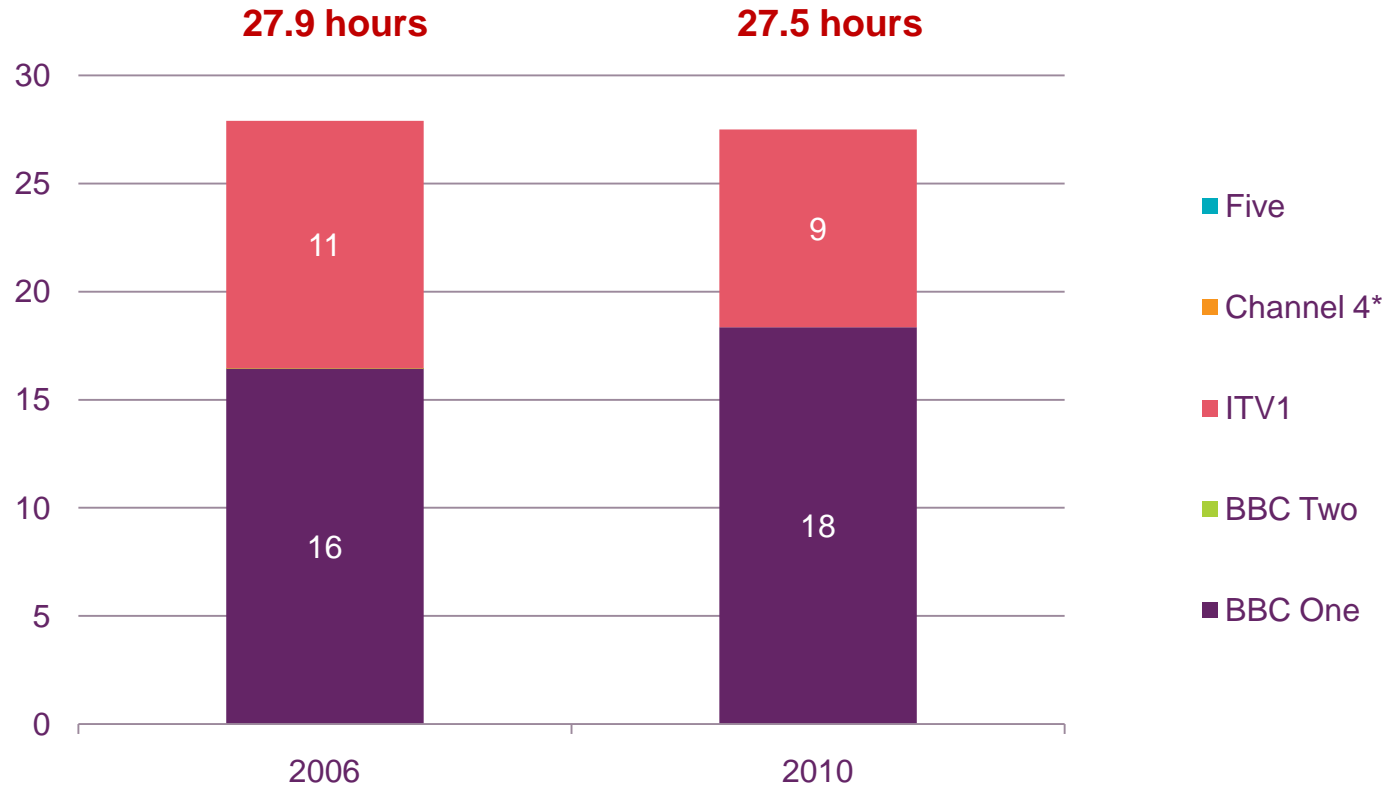


Source: BARB, all Individuals (4+), main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five)

Notes: i) Based on Total minutes of viewing of 'News: National/International' and 'News: Regional News' sub-genres respectively

Fig 21 Total viewing of Nations/regions News, all individuals, main five PSB channels only, 2006 vs. 2010

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



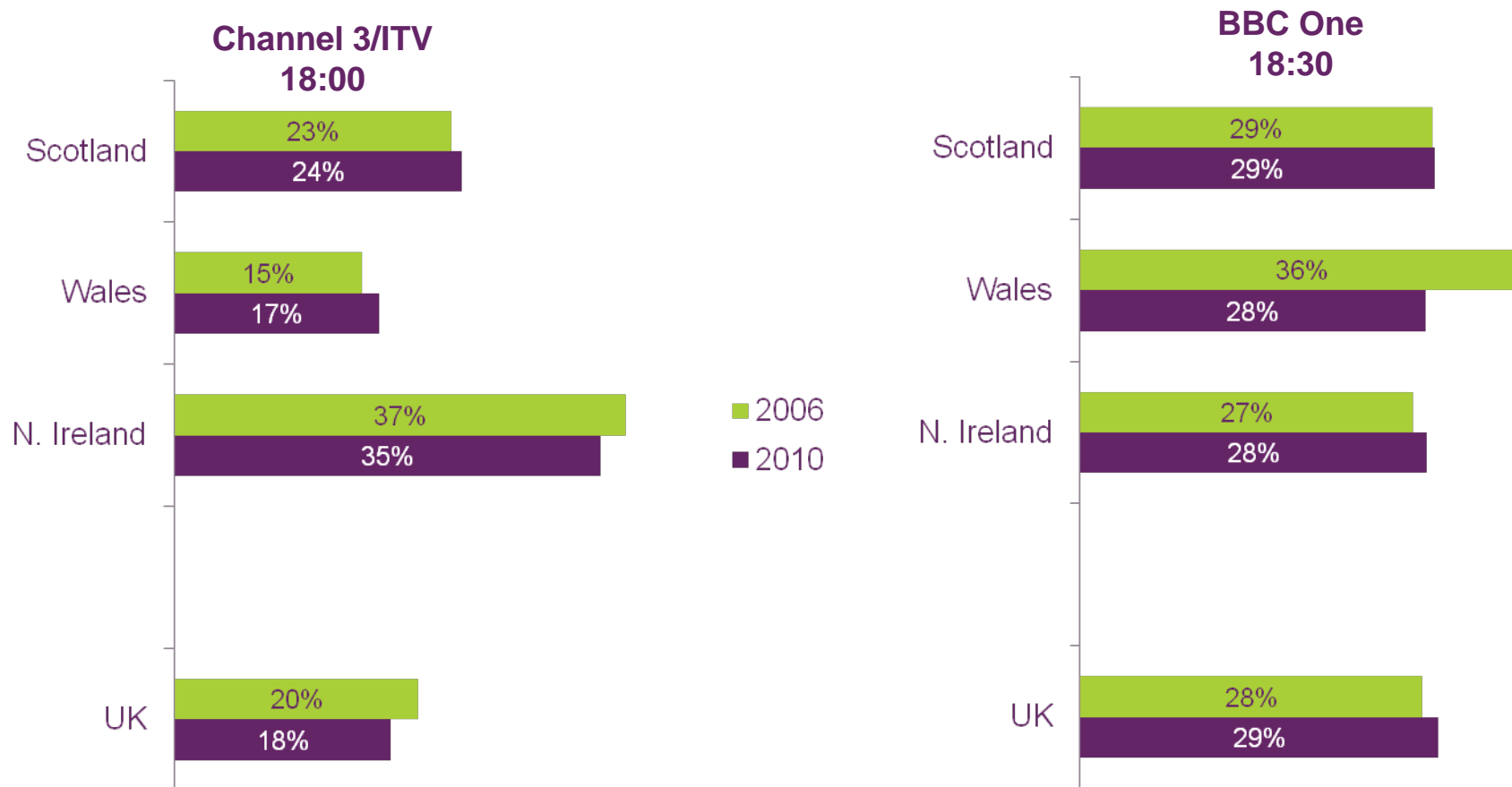
Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

Notes: i) Note: 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.

ii) Based on Total minutes of viewing of 'News: Regional' genre

* C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

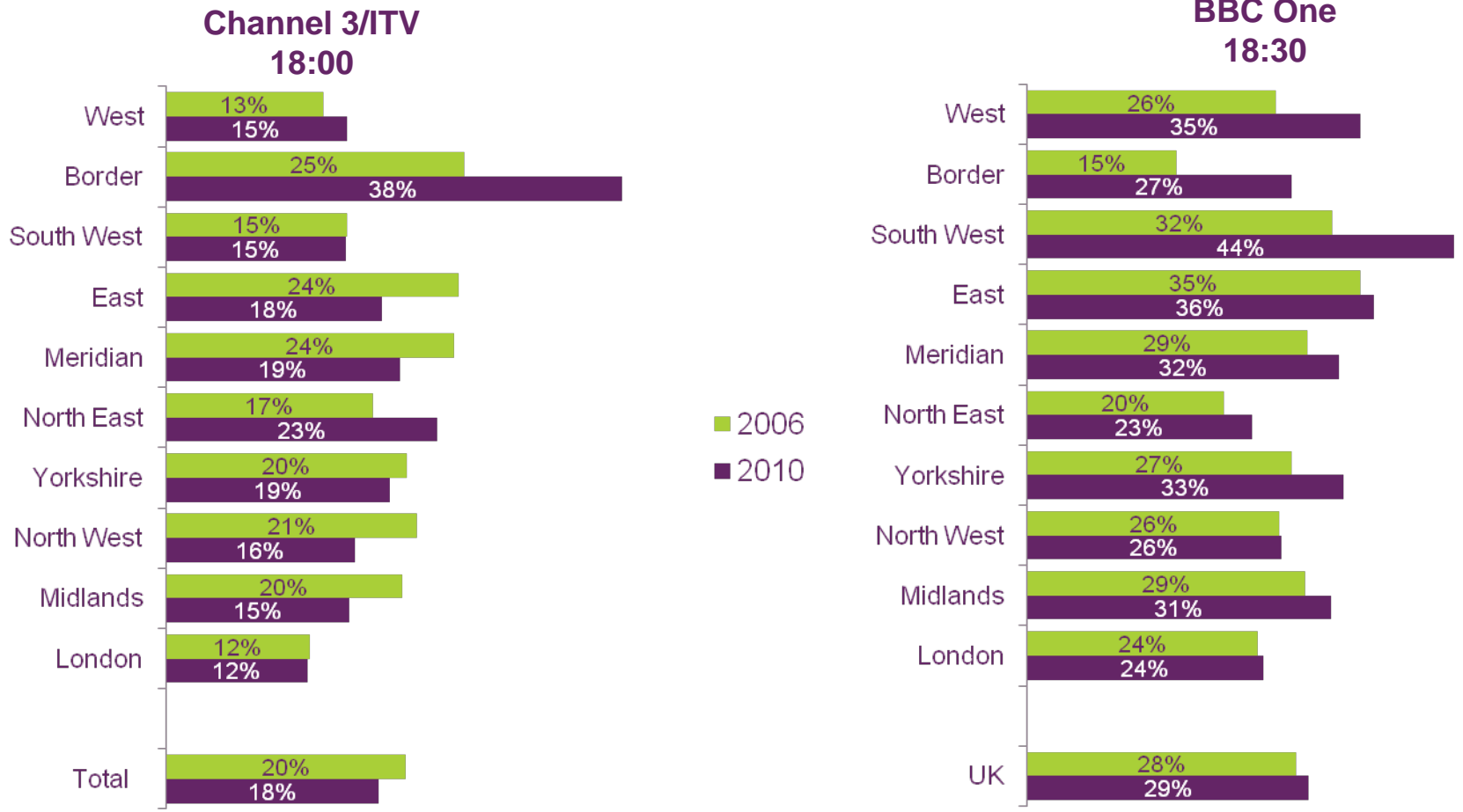
Fig 22 Channel 3 and BBC nations News viewing share, 2006 and 2010



Source: BARB, all Individuals (4+)

- Notes:**
- i) Based on average channel shares of 'News: Regional News' genre programming start time 17:50-18:40 Monday-Friday
 - ii) ITV regions used for analysis, therefore BBC One share may not exactly correlate with distinct BBC regional news programmes
 - iii) As part of the panel change (2010), there was a re-defining of geographic boundaries which may have had a contributing effect to any viewing data changes 2006 vs. 2010. Pre and post panel data should be viewed with caution.

Fig 23 ITV1 and BBC regional News viewing share, 2006 and 2010



Source: BARB, all Individuals (4+)

- Notes:**
- i) Based on average channel shares of 'News: Regional News' genre programming start time 17:50-18:40 Monday-Friday
 - ii) ITV regions used for analysis, therefore BBC One share may not exactly correlate with distinct BBC regional news programmes
 - iii) As part of the panel change (2010), there was a re-defining of geographic boundaries which may have had a contributing effect to any viewing data changes 2006 vs. 2010. Pre and post panel data should be viewed with caution.

Summary: Factual, Music and Arts, Education and Religion; 2006 vs. 2010



Note: 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.

- Compared with 2006, viewing to Other Factual* and Specialist Factual on the main five PSBs increased in 2010 (See Figure 24):
 - **Other Factual:**
 - viewers watched an average of 135 hours in 2010 on the main five PSB channels (up 9 hours on 2006)
 - BBC One and Channel 4 were most viewed, accounting for 35 hours each, though viewing to BBC One had increased (by 7 hours) but remained flat on Channel 4 compared to 2006.
 - Across BBC digital channels there were an average 6 hours viewed on BBC Three and 2 hours on BBC Four.
 - **Specialist Factual:**
 - viewing increased to 30 hours in 2010 (an increase of 1 hour compared to 2006)
 - similar to 2006, viewing to BBC One (12 hours) and BBC Two (11 hours) were dominant contributors
- Viewing to Music, Arts, Education and Religious programming on the main five PSBs has declined in 2010 compared to 2006 levels (see Figure 25):
 - **Music:** Decreased from 5.3 in 2006 to 4 hours in 2010, driven by a decrease of 1.6 hours to Five.
 - **Arts:** More than halved (3.9 in 2006 to 1.8 hours in 2010). BBC Two saw the biggest decline (of 0.9 hours).
 - **Education:** Decreased from 2.1 to 0.2 hours in 2010, mainly caused by a fall in viewing to BBC Two (of 1.5 hours).
 - **Religious:** Decreased from 3.2 to 2.7 hours, mainly due to a fall in BBC One viewing (2.5 to 2.1 hours).

Note: 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 April/May 2011.

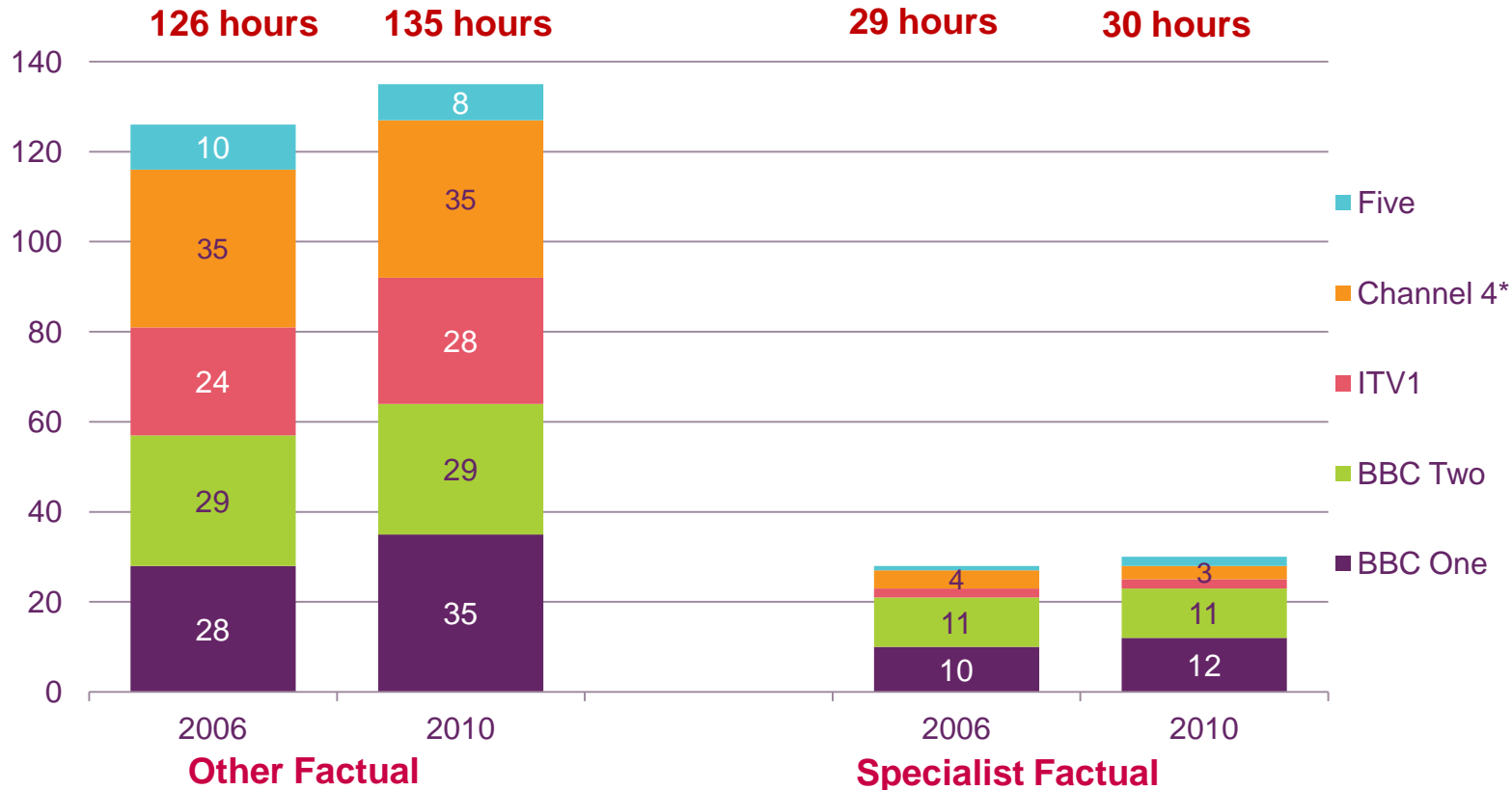
* Other Factual is made up of the following BARB genres: Documentaries: human interest; Documentaries: Factual Entertainment; Hobbies & Leisure category

Factual, Music and Arts, Education and Religion



Fig 24 Total viewing of Other and Specialist Factual, all individuals, main five PSB channels, 2006 vs. 2010

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



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

ii) Other Factual = Hobbies & Leisure category, Documentaries – Human Interest; Factual Entertainment

iii) Specialist Factual = Documentaries – Natural History; Science & Medical; History; Factual Drama

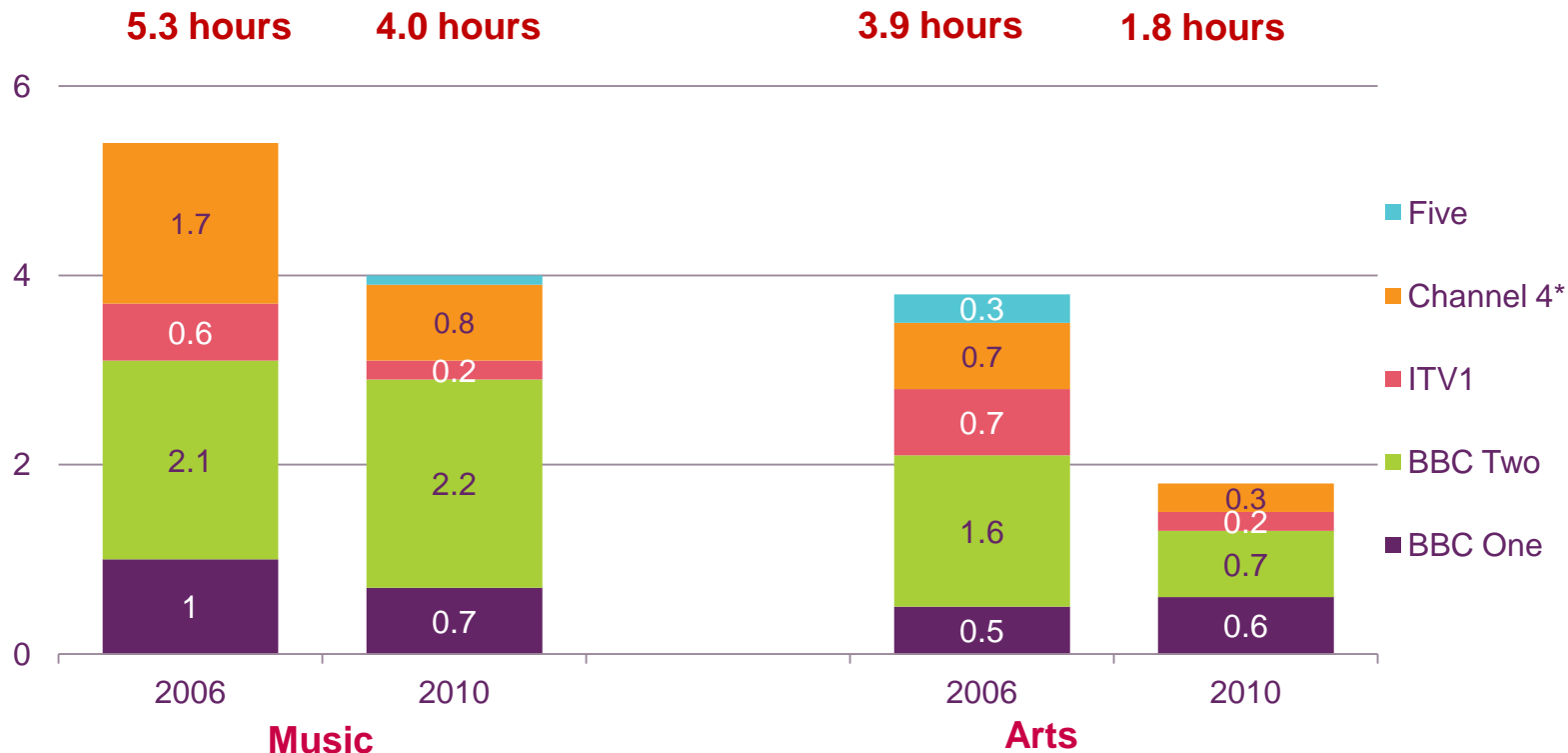
* C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

Factual, Music and Arts, Education and Religion



Fig 25 Total hours of viewing of Music and Arts, all individuals, main five PSB channels, 2006 vs. 2010

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



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

ii) Based on Total minutes of viewing of 'Music' and 'Arts' genres respectively. Minor differences may exist due to rounding.

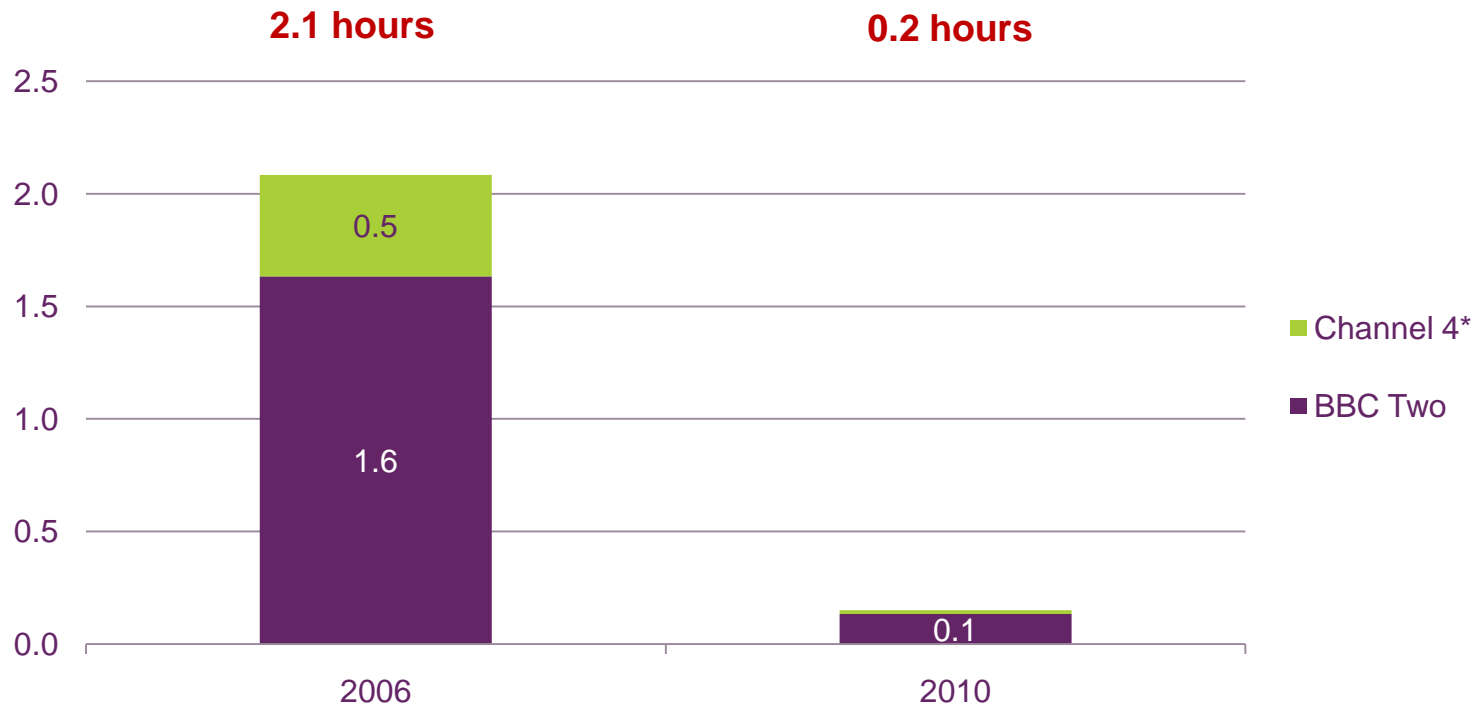
* C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

Factual, Music and Arts, Education and Religion



Fig 26 Total hours of viewing of Education, all individuals, main five PSB channels, 2006 vs. 2010

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



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

ii) Based on Total minutes of viewing of 'Education' genre. Minor variations may exist due to rounding.

iii) No reported viewing of Education genre on BBC One, ITV1, Five in both 2006 and 2010

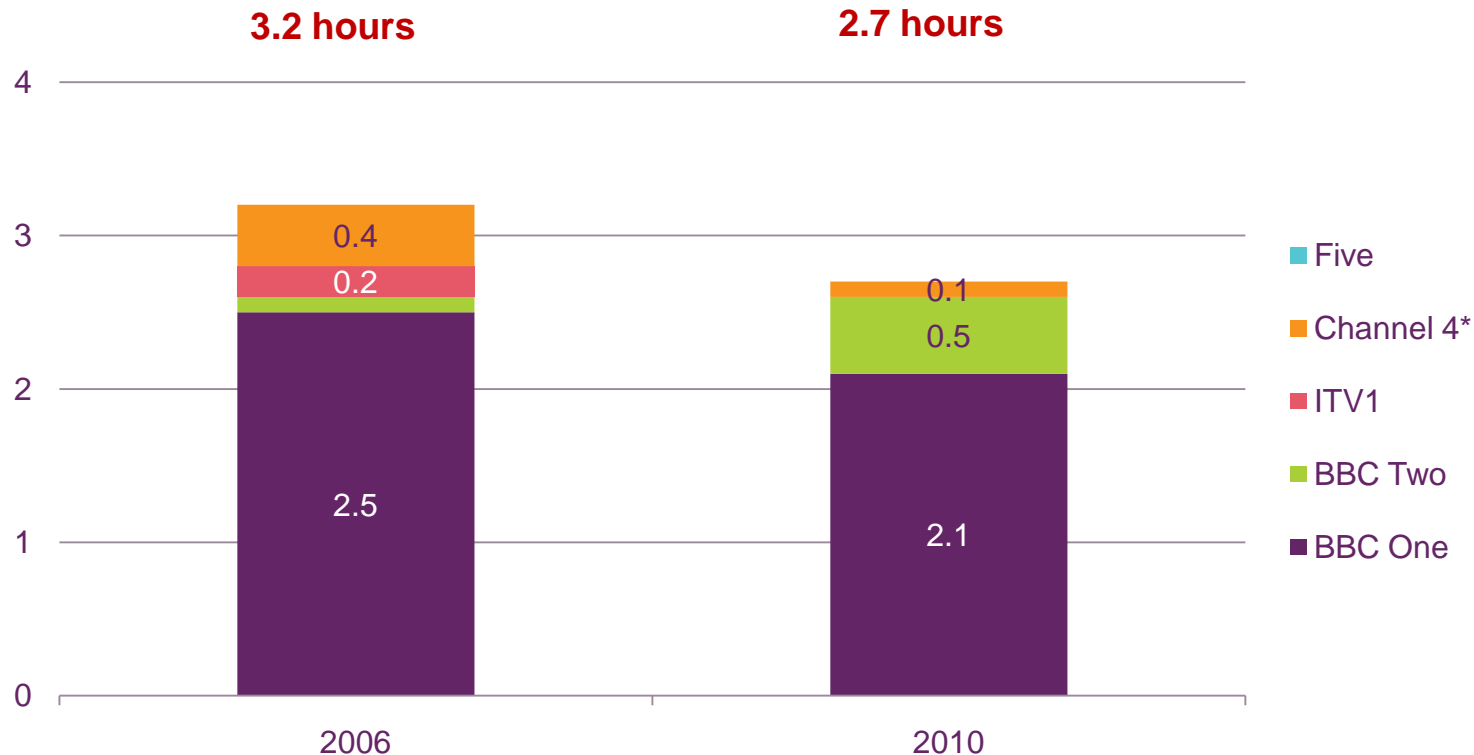
* C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

Factual, Music and Arts, Education and Religion



Fig 27 Total hours of viewing of Religious programmes, all individuals, main five PSB channels, 2006 vs. 2010

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



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

ii) Based on Total minutes of viewing of 'Religion' genre. Minor variations may exist due to rounding.

* C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

UK Drama, UK Soaps, UK Situation Comedy and Sport

Summary: UK Drama, UK Soaps, UK Situation Comedy and Sport; 2006 vs. 2010



Note: 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.

- **UK Drama:**

- Viewing of UK Drama on the main five PSB channels was a total average of 68 hours for the average individual in 2010. This was down from 80 hours in 2006. (See Figure 28).
- The decrease was largely attributable to a fall in viewing to ITV1 (down 11 hours from 39 in 2006 to 28 in 2010). - In 2006, viewing was highest to ITV1 but as a result of its decline in viewing hours, UK Drama was viewed most on BBC One in 2010 (an average 37 hours) despite no change in BBC One's viewing levels compared to 2006.

- **UK Soaps:**

- Viewing of UK Soaps on the main five PSB channels also fell in 2010 compared to 2006 levels, down from a total average of 74 hours to 65 hours. (See Figure 28).
- The bulk of decline was on ITV1 (49 hours to 41 hours), however it was still dominant in share of viewer hours.

- **UK Situation Comedy:**

- Viewing of UK Situation Comedy on the main five PSB channels fell from 9.6 hours in 2006 to 5.4 hours in 2010.
- The main factor of this was a drop in viewing to BBC One (6.4 hours in 2006 to 2.6 hours in 2010) (Figure 29).

- **Sport:**

- Viewing of Sport on the main five PSB channels fell from 82 hours in 2006 to 75 hours in 2010 (See Figure 30).
- BBC One and BBC Two both experienced a decline in viewing of 3 hours each; while Channel 4 and Five saw smaller decreases of 1 hour each. Viewing to ITV1 actually increased from 18 hours to 19 hours. (Note: In both 2006 and 2010 there were World Cup football tournaments televised on the main PSB channels).

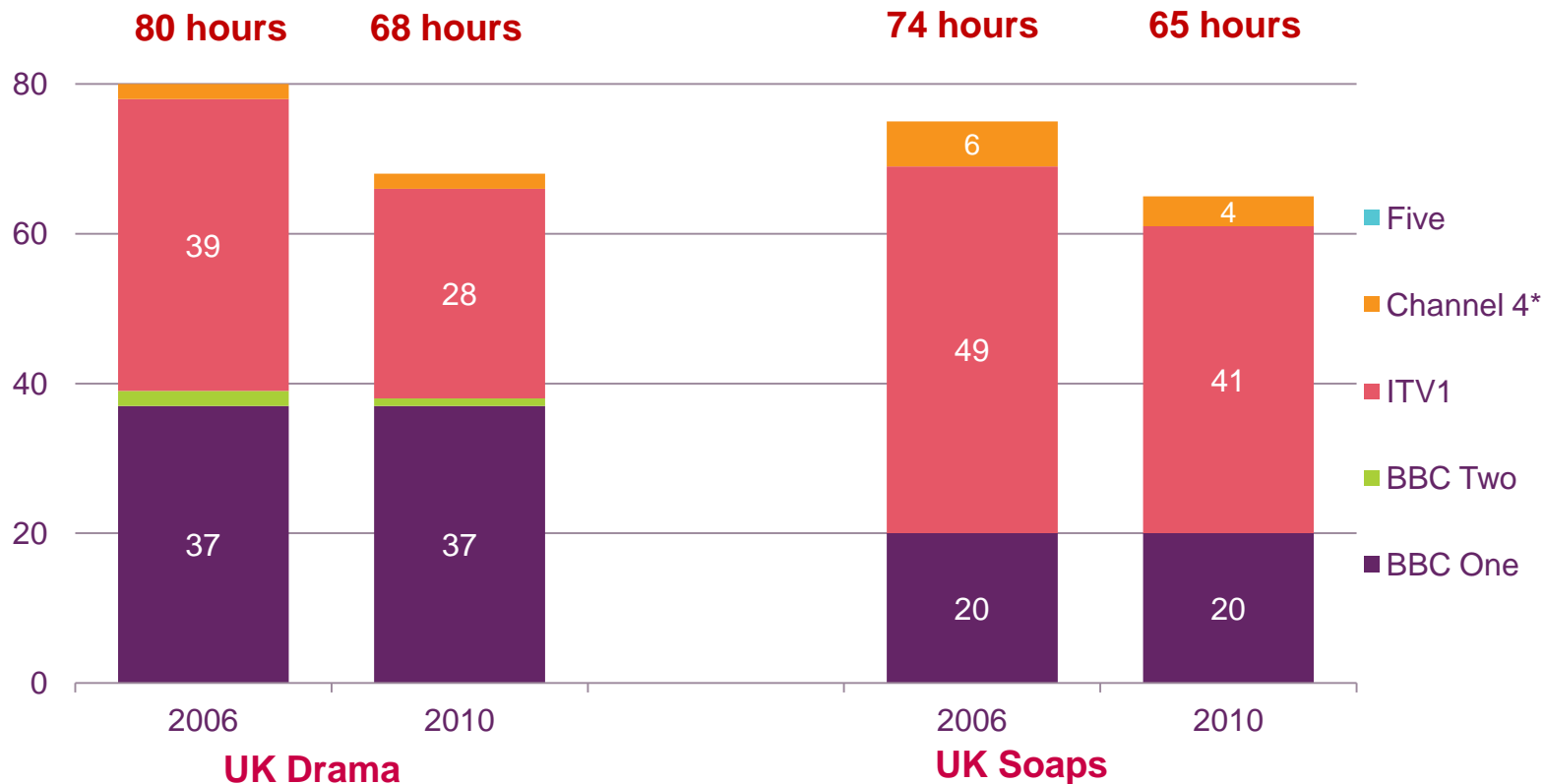
Note: Changes to the BARB reporting system now allow broadcasters to retrospectively amend genre labelling of broadcasts aired. These changes will apply to all historic data too. Therefore analysis within this report is based on a snapshot of data at a given point in time. All analysis is based as of April/May 2011.

UK Drama, UK Soaps, UK Situation Comedy and Sport



Fig 28 Total viewing hours of UK Drama and UK Soaps, main five PSB channels, 2006 vs. 2010

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



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

ii) Based on Total minutes of viewing of a) UK Drama: 'UK Single Plays' + 'UK Series/Serials' and b) 'Drama: UK Soaps' respectively

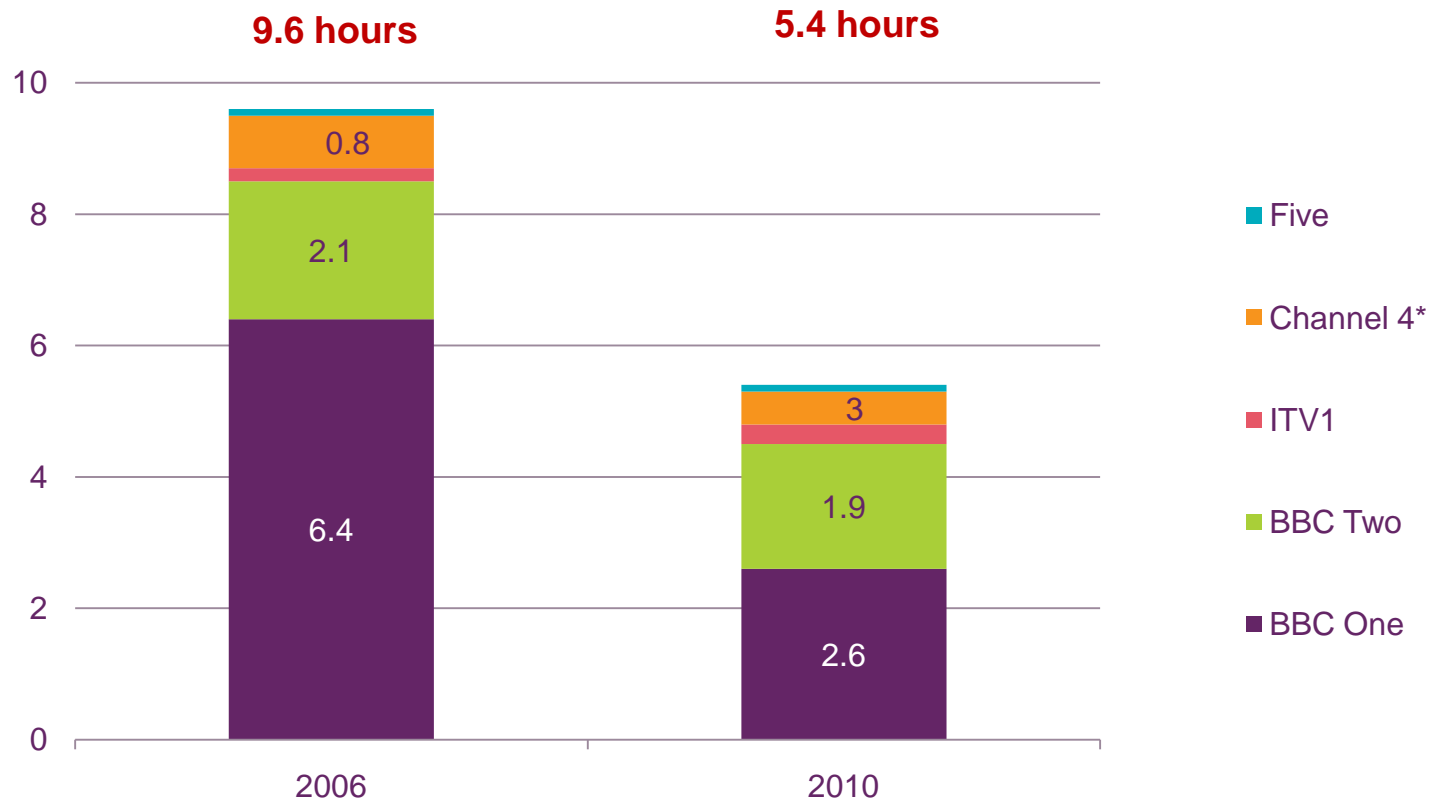
*C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

UK Drama, UK Soaps, UK Situation Comedy and Sport



Fig 29 Total viewing hours of UK Situation Comedy, main five PSB channels, 2006 vs. 2010

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



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

ii) Based on Total minutes of viewing of 'Drama: UK Sitcom' sub-genre

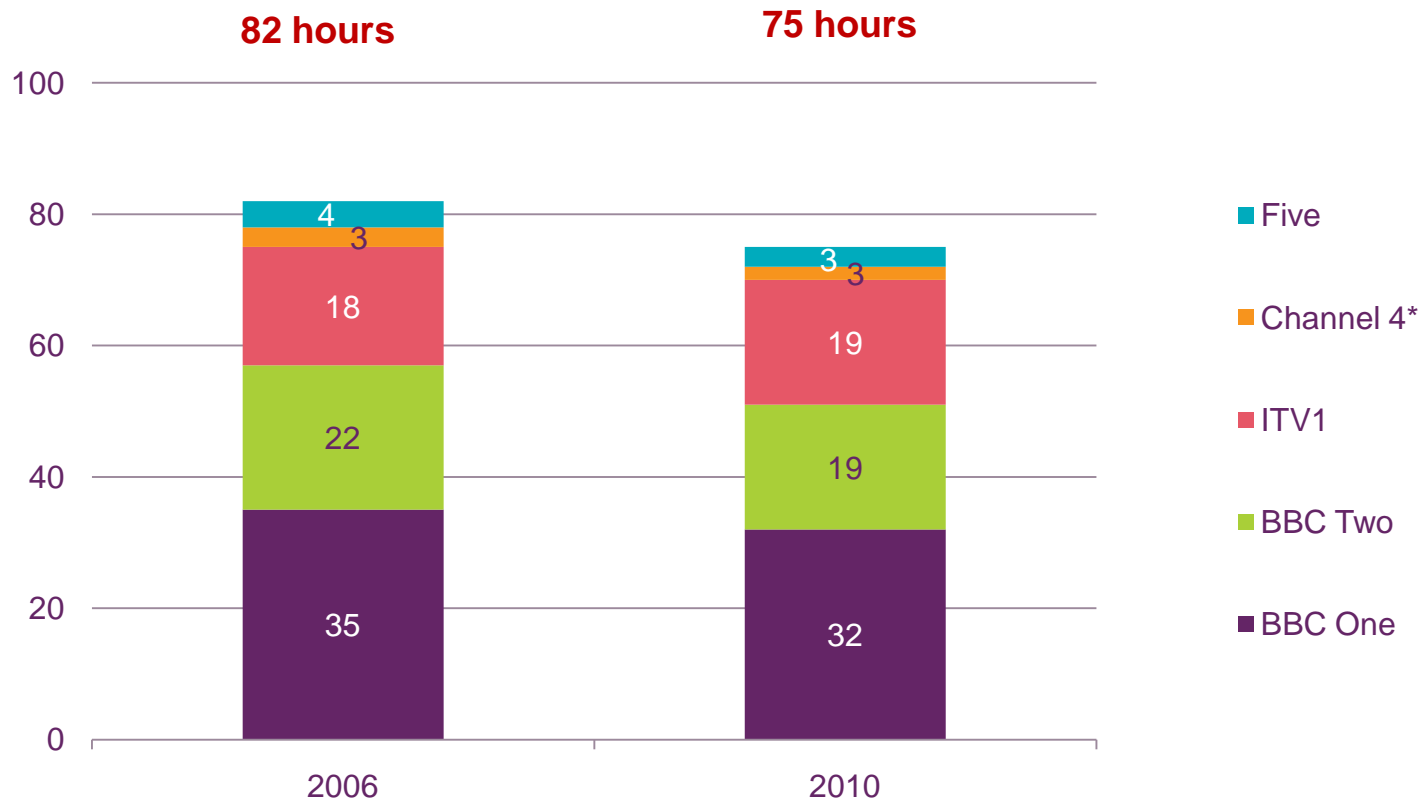
*C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

UK Drama, UK Soaps, UK Situation Comedy and Sport



Fig 30 Total viewing hours of Sports, main five PSB channels, 2006 vs. 2010

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



Source: BARB, Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

ii) Based on Total minutes of viewing of 'Sport' genre

*C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

Summary: Children's viewing and programming (1)



Note: 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.

- In 2010, the amount of television watched by an average child (aged 4-15 years) was 17.6 hours per week, or 2 hours 30 minutes per day (See Figure 31).
- However, the proportion of children's total viewing to the main five PSB channels has declined steadily between 2006 (46%) and 2010 (35%). Over this same period, there has been a gradual increase in the proportion of viewing to the BBC digital channels, 7% to 12%; while viewing to other multichannels increased from 47% to 52%, now attracting the majority of total viewing by children (See Figure 31).
- Looking at viewing of *Children's programming* by all children in multichannel homes (Figure 33) shows the proportion of total viewing to the main five PSBs has fallen significantly, from 19% in 2006 to 8% 2010. However, an increase in viewing to the BBC digital channels (i.e. CBeebies and CBBC) from 21% to 30% has to a large extent offset this decrease. Alongside this, the proportion of viewing to other multichannels also increased from 60% in 2006 to 62% in 2010.
- Among children in multichannel homes, there was an increase in total viewing by children to *Children's programming* on the PSB channels, from 83 hours in 2006 compared to 96 hours in 2010 (See Figure 33). This increase can be attributable to the increases in viewing to CBeebies (29 to 35 hours) and to CBBC (24 to 43 hours). The changes in levels of viewing to the main five PSB channels were relatively minor.

Note: 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 April/May 2011.

Summary: Children's viewing and programming (2)

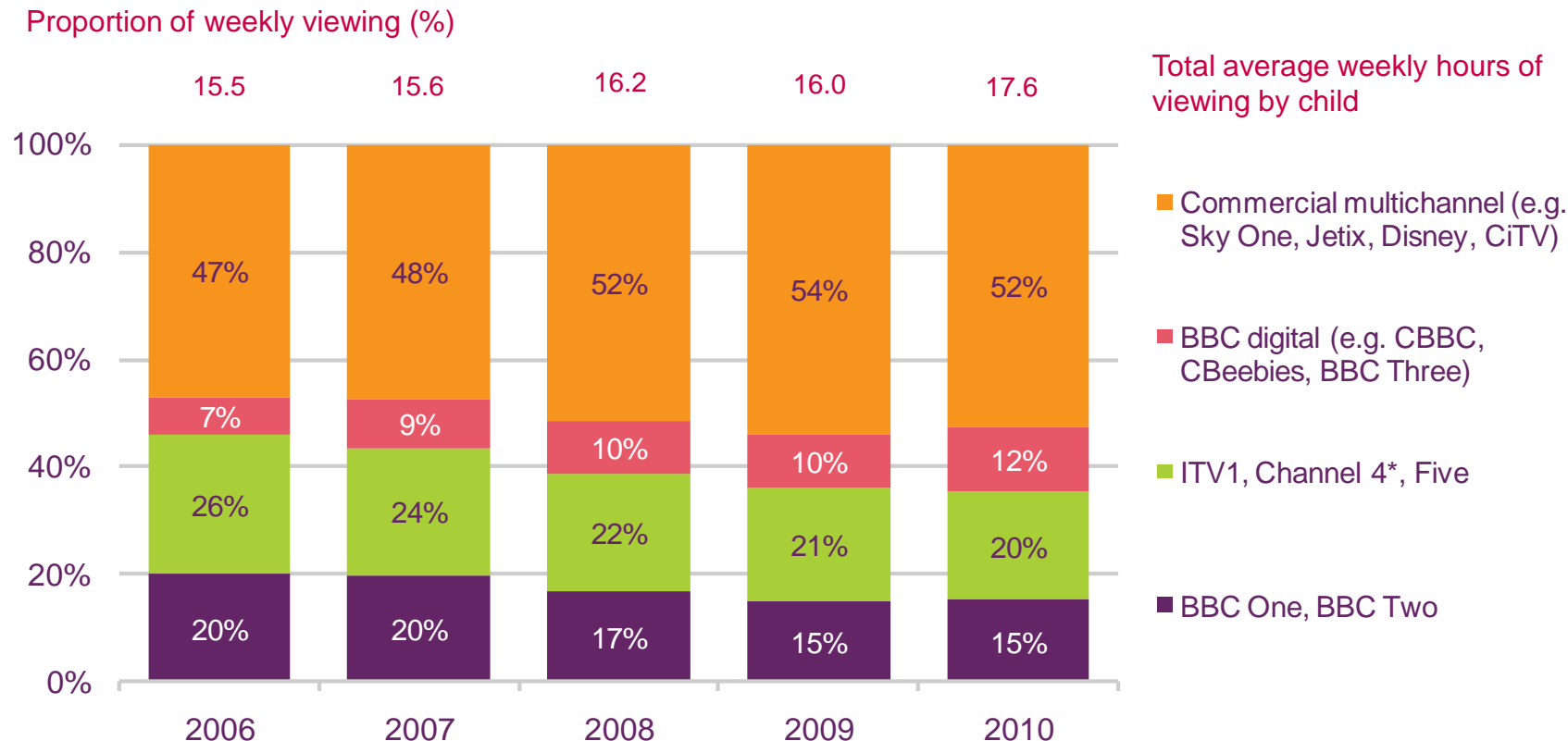


Note: A new BARB panel was introduced in 2010. Consequently data pre and post panel change (2010) are based on different panels and therefore are not strictly comparable and should be considered with caution.

- In terms of children's total viewing, across the main five PSB channels, the proportion to Children's programming declined from 12% in 2006 to 6% in 2010, the biggest decrease across any genre. At the same time viewing to BBC digital channels increased, 7% to 12%, largely driven by viewing to Cbeebies and CBBC (Figure 31).
- Other than to Children's programming, viewing to other genres changed relatively little in 2010 compared with 2006. Most notable was a 2% decrease in viewing to Soaps; while Entertainment (the most popular genre) saw a 3% increase. Other Factual and Current Affairs each enjoyed a 2% increase compared to 2006 levels.
- The proportion of children's viewing across the individual main PSB channels in 2010 shows some clear variations in genre viewing profiles (Figure 35). In particular:
 - **BBC One:** Viewing to National News/Weather accounted for 13%, notably more than on the other channels.
 - **BBC Two:** Viewing to Children's programming accounted for 22%, higher than on all the other main PSB channels. Viewing to Sport (17%) and Specialist Factual (8%) were also highest proportions.
 - **ITV1:** Viewing to Entertainment accounted for one-third of total children's viewing to the channel, the highest proportion across all the main PSBs. Soaps accounted for 18% – also higher than on the other channels.
 - **Channel 4:** Other Factual represented 37% - much higher than on the other main PSB channels. Viewing to Entertainment (29%) was also relatively high (compared to a 21% average across the main PSBs).
 - **Five:** Films accounted for 27% of viewing, the highest across the main five channels. Viewing to Children's programming (18%) was of note (much higher than the main PSBs average, 6%, but less than on BBC Two)

Note: 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 April/May 2011.

Fig 31 Children's total weekly viewing, by channel type



Source: BARB, All children (ages 4-15). 2006-2009 = Children, multichannel universe; 2010 = Children in multichannel homes, network universe.

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

ii) Based on Total minutes of viewing

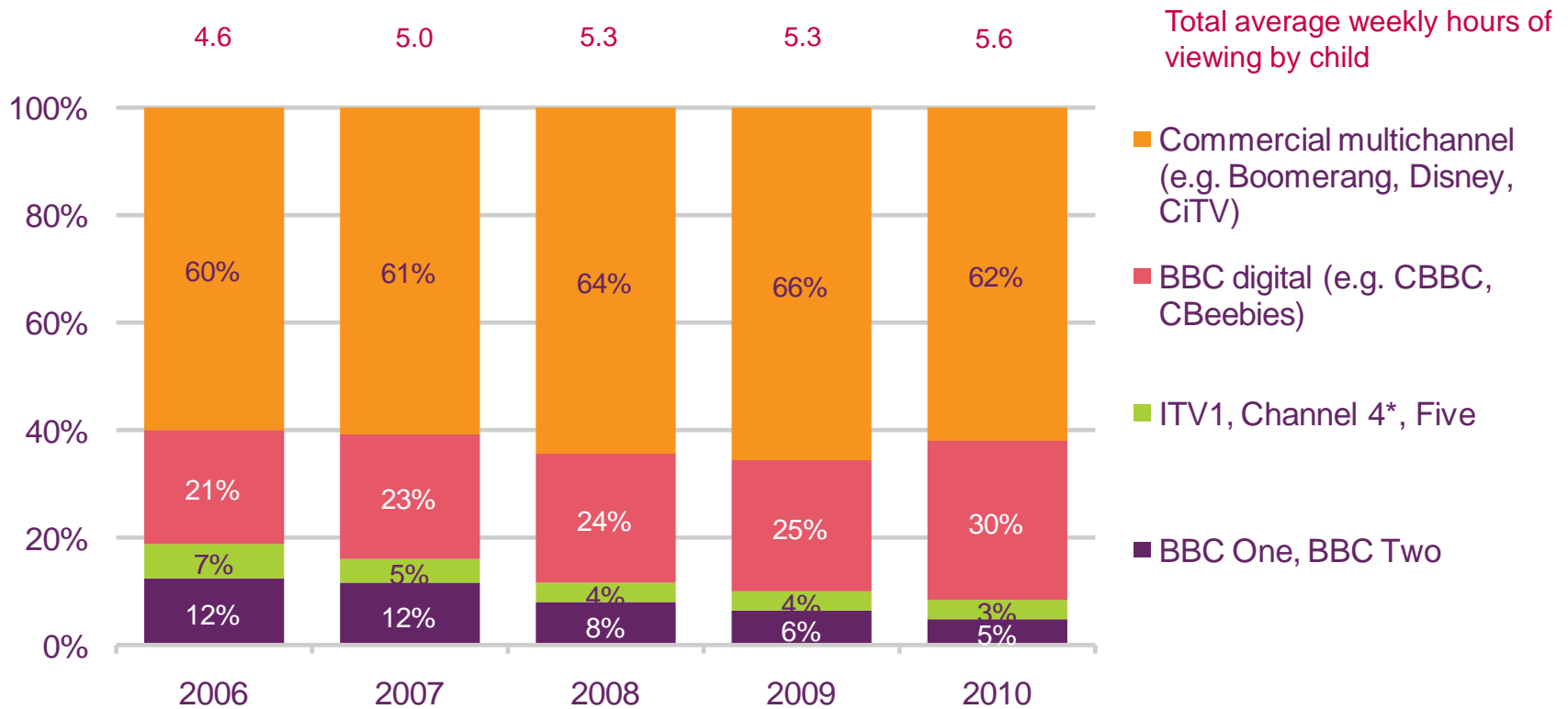
*C4 2006-09 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

Children's viewing and programming



Fig 32 Children's weekly viewing of Children's genre programming, by channel type

Proportion of weekly viewing (%)



Source: BARB, All children (ages 4-15). 2006-2009 = Children, multichannel universe; 2010 = Children in multichannel homes, network universe.

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

ii) Based on Total minutes of viewing to Children's genre only

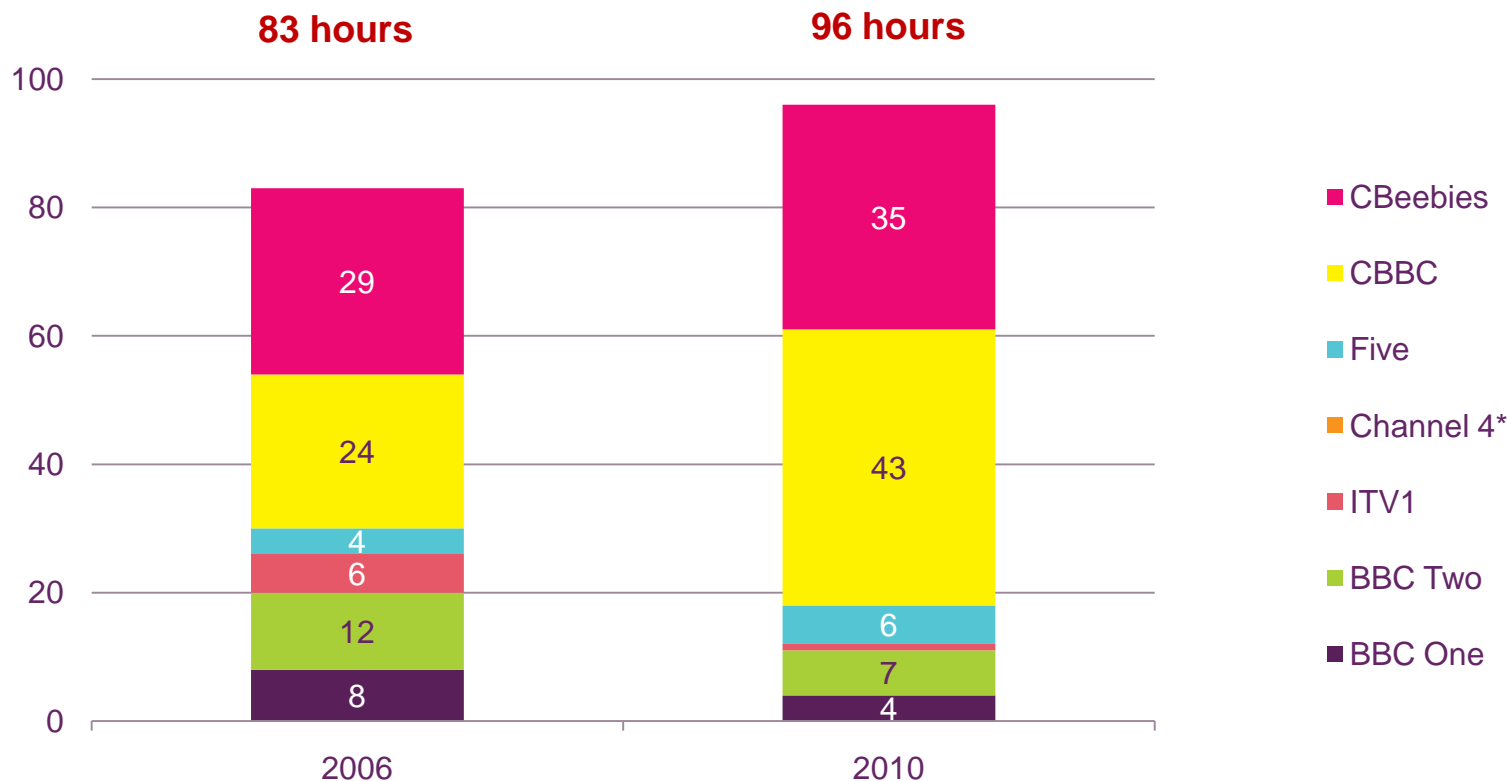
*C4 2006-09 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

Children's viewing and programming



Fig 33 Children's viewing hours of Children's genre, on PSB channels, in multichannel households, 2006 vs. 2010

Total annual hours of viewing by average child



Source: BARB. 2006 data = Children, Multichannel universe. 2010 data = Children in MC Homes, Network universe.

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

ii) Based on Total minutes of viewing of 'Children' programming genre

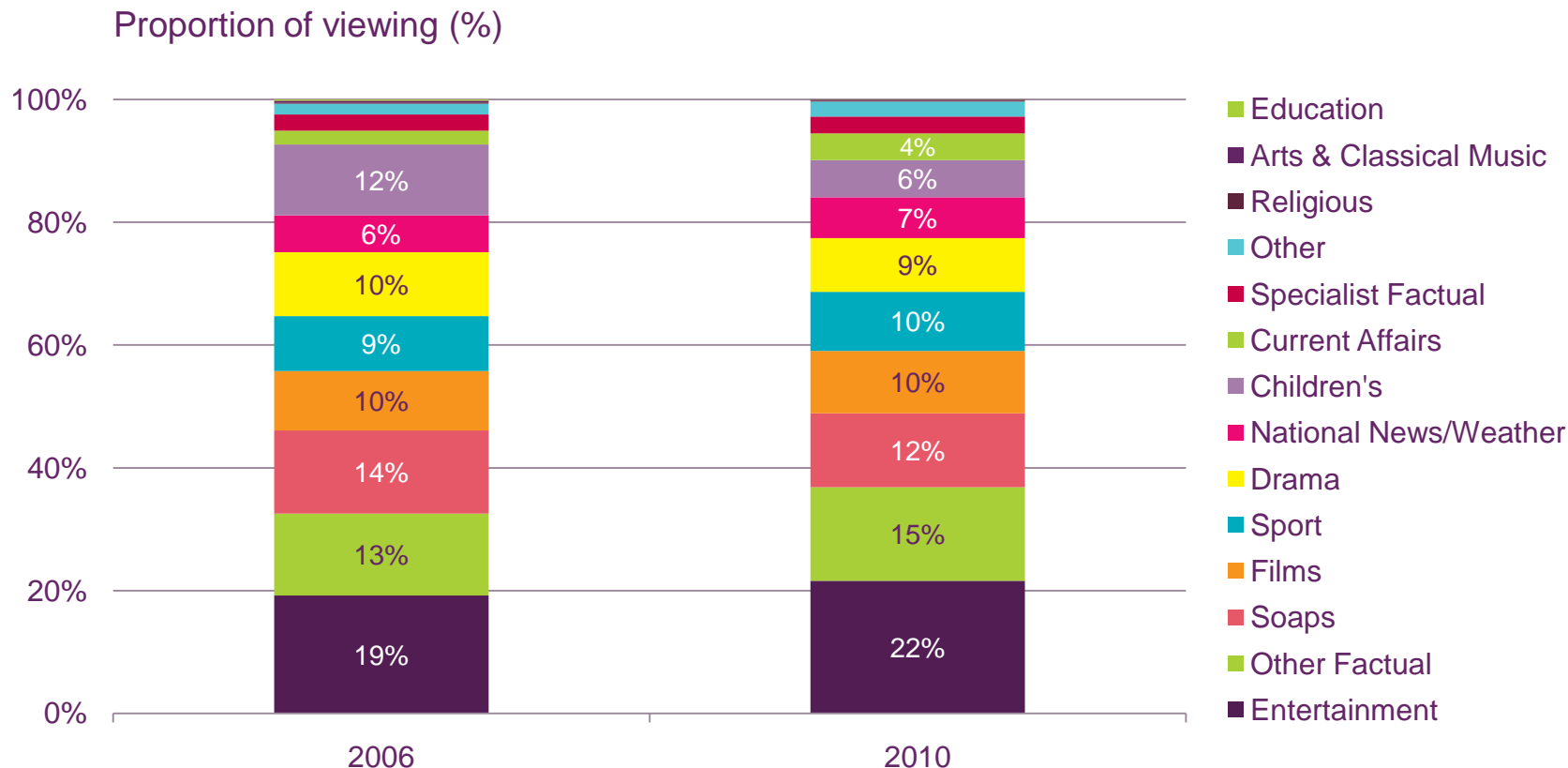
iii) Other PSB channels (e.g. BBC 3, BBC 4) not charted as viewing negligible

*C4 2006 data includes S4C viewing. Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data

Children's viewing and programming



Fig 34 Children's viewing, by genre, on the main five PSB channels, 2006 vs. 2010



Source: BARB, All children (4-15). Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

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

ii) Network viewing - excludes nations/regions programming

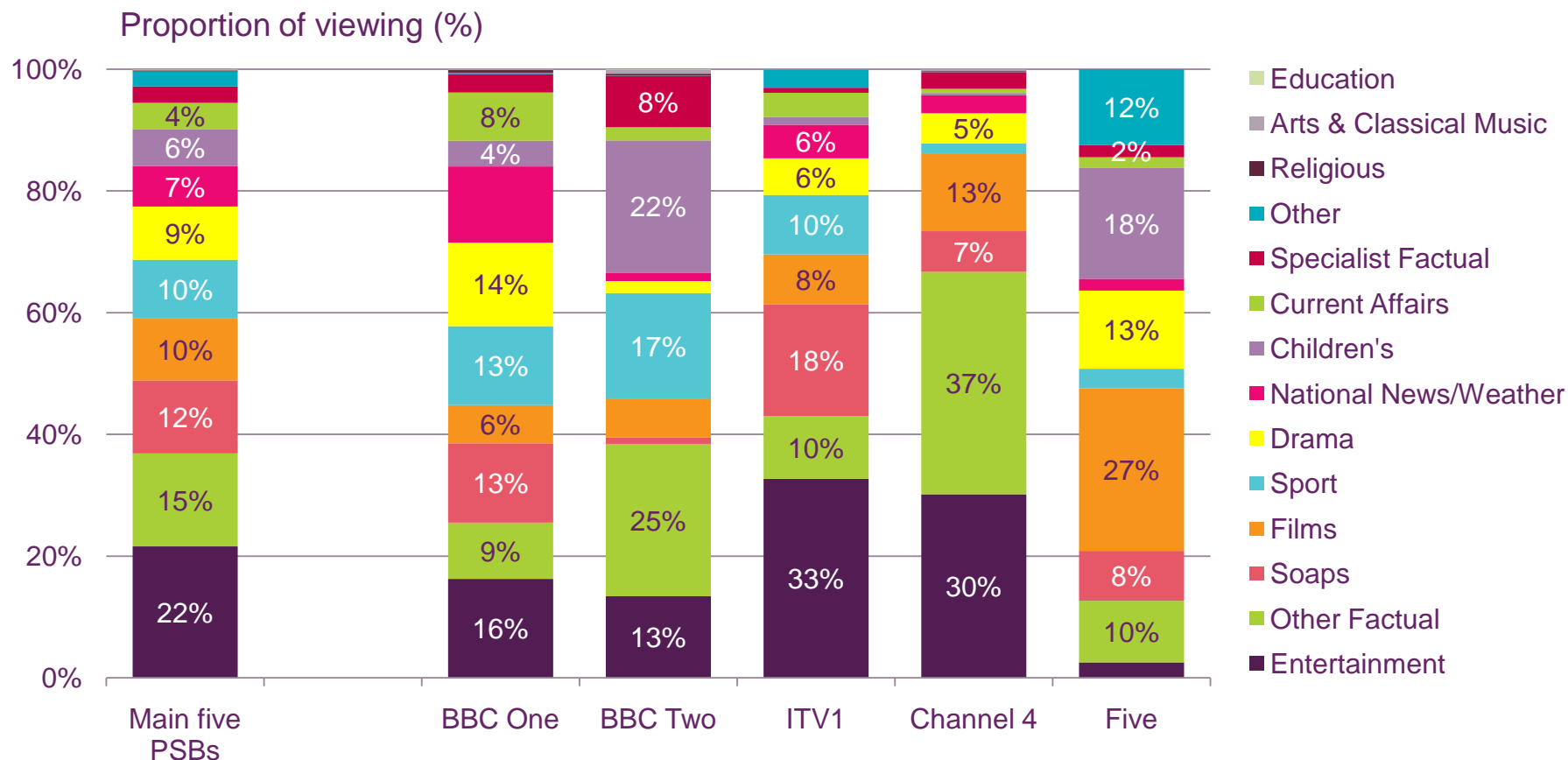
iii) Other includes unassigned broadcasts and Party Political Broadcasts

iv) Following DSO in Wales, S4C became a standalone channel and so is excluded from C4's 2010 data. C4 data for 2006 includes S4C

Children's viewing and programming



Fig 35 Children's viewing, by genre, on the main five PSB channels, by channel, 2010



Source: BARB, All children (4-15). Network, main 5 PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five).

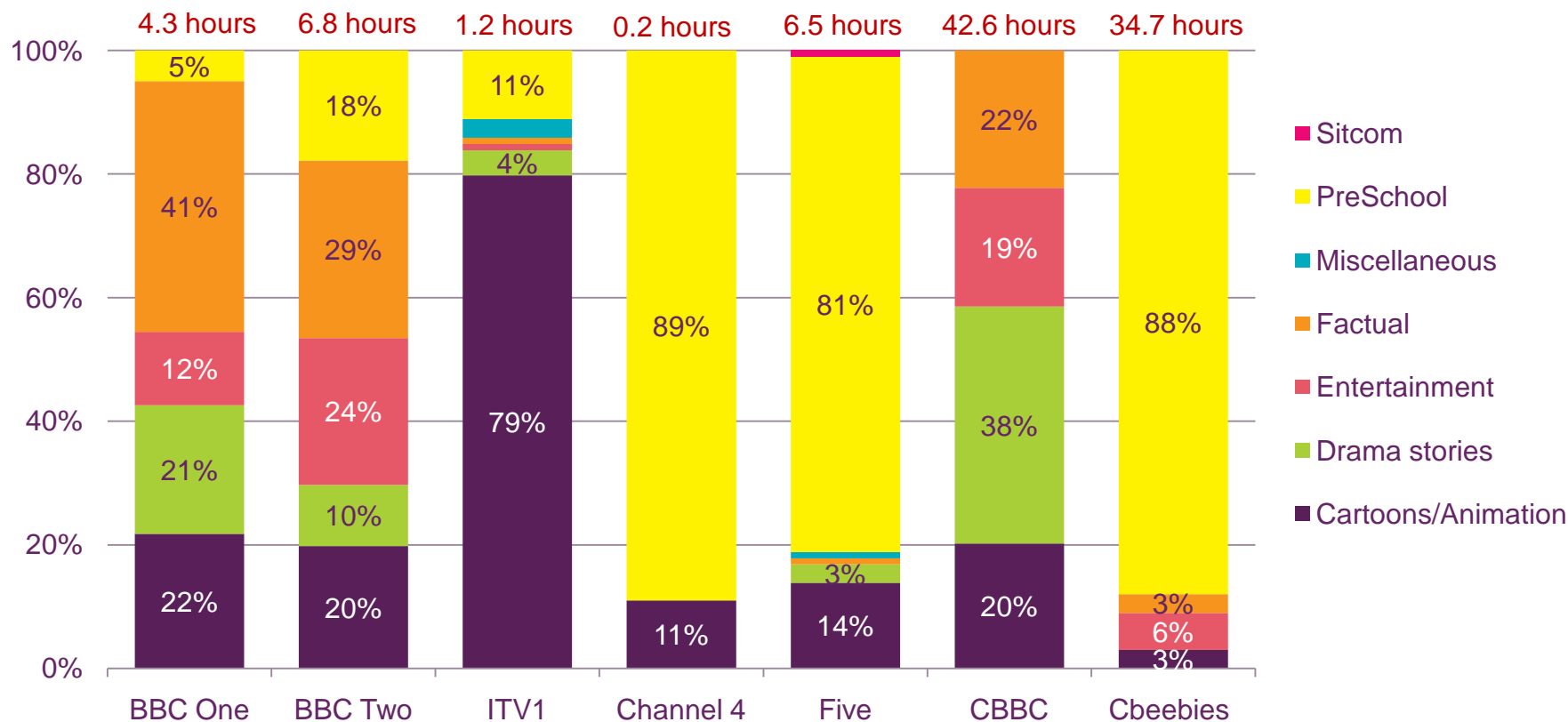
Notes: i) Note: New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

ii) Network viewing - excludes nations/regions programming

iii) Other includes unassigned broadcasts and Party Political Broadcasts

Fig 36 Proportion of viewing of the Children's genre by subgenre, on individual channels, 2010

Proportion of viewing (%)



Source: BARB, All children (4-15) viewing to Children's sub-genres.

Notes: Children's Quizzes exist as a sub-genre of the Children's genre within BARB. However, viewing accounted for 0% (rounded) of total

Summary: S4C

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

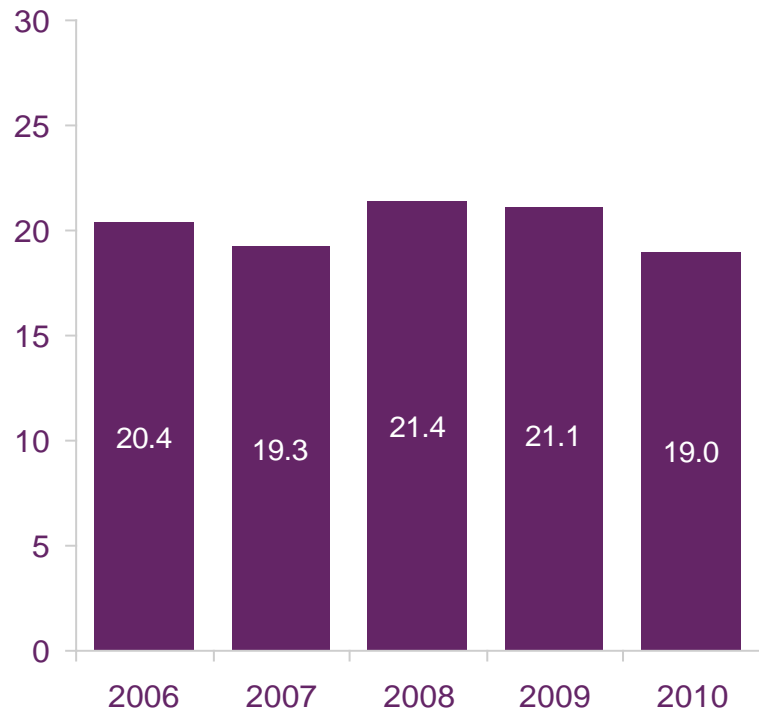
The Welsh Authority has the statutory responsibility to provide the S4C service for viewers in Wales. The digital switchover process was completed in Wales at midnight 30 March 2010 when the S4C analogue service ceased broadcasting making S4C a wholly Welsh language channel broadcasting over 115 hours of programmes each week, across a range of platforms, including online. This report focuses on 2010.

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.

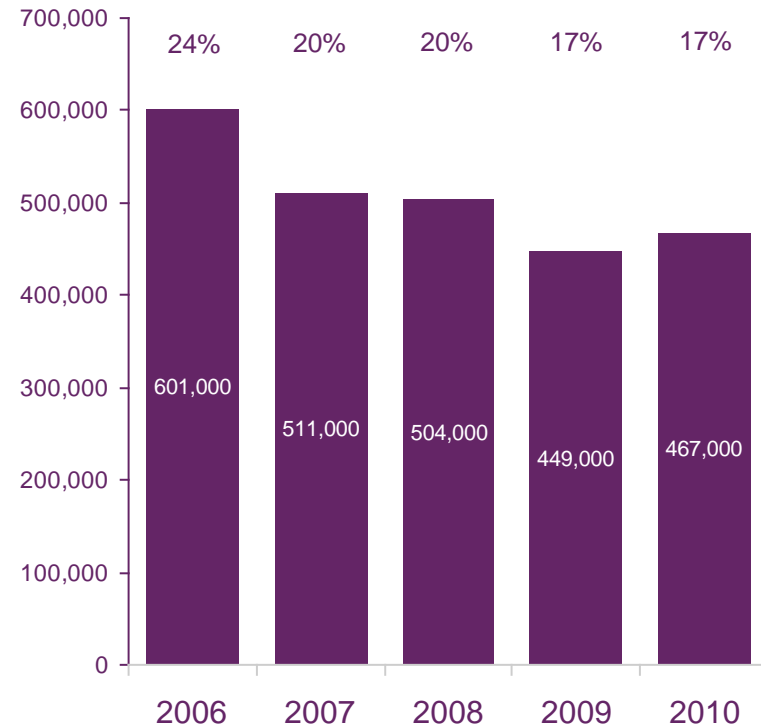
- In 2010, S4C Welsh language programmes were watched for an average of 19 hours per year by all individuals in the S4C region; this is a decrease on the average hours watched in 2006 (20.4 hours), and is lower than the average hours watched in 2009 (21.1 hours) (See Figure 37).
- The weekly reach of Welsh language programming on S4C was 17% in 2010, equalling the previous year, but the weekly reach based on thousands saw an increase year on year with 467,000 individuals tuning into the channel (See Figure 37).
- In 2010, S4C's share of all viewing was 1.3% and its share of peak-time viewing was 1.9% (Figure 38).
- Looking at the proportions of viewing of different genres on S4C in 2010 shows that Drama (including Soaps, series and single dramas) (21%), Sport (23%) and Current Affairs (13%) were the most-watched genres (See Figure 39).

Fig D7 Viewing of Welsh language output on S4C, 2006 - 2010

Hours viewed of Welsh language programming
Average hours a year



Weekly reach of Welsh language programming
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.

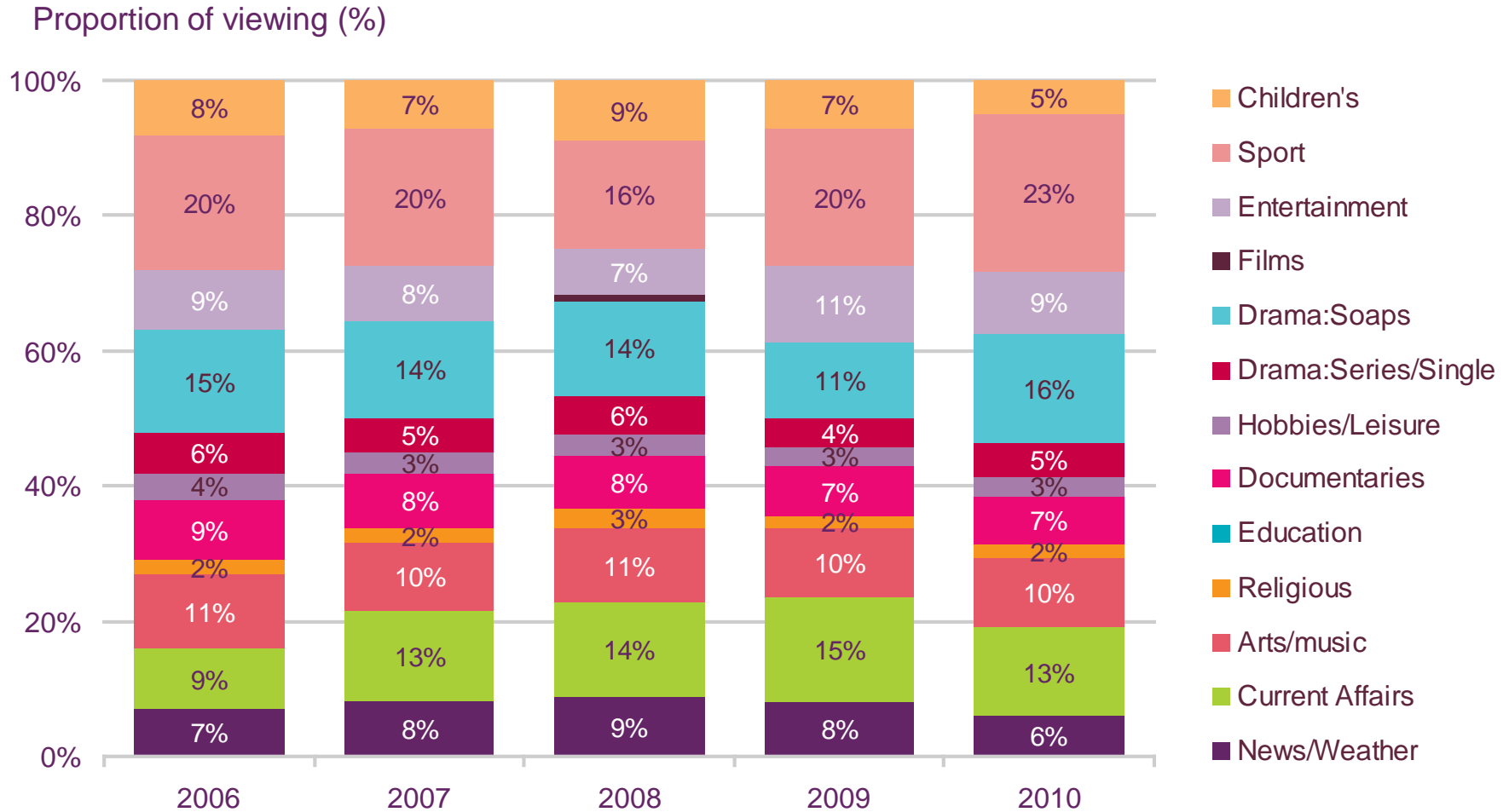
Fig 38 Share of viewing in Wales, all viewers, all hours and peak time, 2006 - 2010

	Share (%)	
	All Hours (0600-3000)	Peak Time (1800-2230)
2006	3.6%	3.3%
2007	3.0%	2.9%
2008	2.7%	2.9%
2009	2.2%	2.6%
2010 *	1.3%	1.9%

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

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

Fig 39 Proportion of viewing of genres on S4C, 2010



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.