



Children's and young people's exposure to alcohol advertising

2007 to 2011

Research Document

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Section 1

Summary

1.1 Introduction

This report sets out the findings of analysis examining trends in young people's exposure to television advertising of alcoholic products between 2007 and 2011. The analysis looks at trends among children aged 4-15 (including sub-groups of 4-9 and 10-15 year olds) and adults aged 16-24 (including the sub-group 16-17 year olds¹). The report looks at how the amount of advertising seen by these demographic groups has changed and considers this in the context of changes in viewing habits and the volume of advertising shown on commercial television channels.

1.2 Background

There have long been concerns about the possible effects on children's attitude towards alcohol that exposure to alcohol advertising might have. In 1999, these led the then television regulator, the Independent Television Commission, to require that alcohol advertising be excluded from programmes deemed likely to be of 'particular appeal' to children.

The identification of programmes of particular appeal to children is done by reference to the predicted proportion of the audience comprising 10-15 year olds for particular programmes. A programme of "particular appeal" to children is deemed to be one that attracts an audience in which 10-15 year olds are over-represented by 20% in relation to their share of the total TV audience. Such a programme would index at 120. For the purposes of deciding when alcohol ads should be excluded from a programme, broadcasters estimate how it is likely to index on the basis of experience and audience data for similar programmes in the past. BARB (the Broadcasters' Audience Research Bureau) provides data on audiences after programmes are broadcast.²

Co-regulatory arrangements

In 2005, Ofcom entered into co-regulatory arrangements with the Broadcast Committee of Advertising Practice (BCAP), which has lead responsibility for keeping advertising rules under review, and the Advertising Standards Authority (ASA), which is responsible for securing compliance with those rules. As the backstop regulator, Ofcom retains responsibility for approving changes to the advertising rules.

Later in 2005, following the publication of the then Government's Alcohol Harm Reduction Strategy³, the Advertising Code was strengthened with the aim of reducing the general

¹ The standards objectives set out in section 319(2)(a) of the Communications Act 2003 require the protection of persons under the age of eighteen. There are no viewing data for children under 4. There are BARB viewing data for 4-9s, 10-15s and 16-17s, but Nielsen data on exposure does not separate out 16-17s, hence the use of the broader 16-24 group.

² BARB produces estimates of the size and demographic composition of audiences for programmes after they have been broadcast on the basis of viewing data collected from the BARB panel, which is made up of 5,100 households. The relevant demographic categories in this case are 4-9 year olds (viewing by under 4s is not measured), and 10-15s. Other demographic categories include 4-15s, 16-17s, and 16-24s.

³ *Alcohol Harm Reduction Strategy*, Prime Minister's Strategy Unit, March 2004. A copy of this document can be found at <http://www.newcastle-staffs.gov.uk/documents/community%20and%20living/community%20safety/caboffice%20alcoholhar%20pdf.pdf>

appeal of alcohol ads to young persons, especially under-age drinkers, by prohibiting the use of advertising techniques that linked alcohol consumption to:

- youth culture;
- sex, sexual activity or sexual success;
- aggressive, anti-social or irresponsible behaviour;

or that depicted irresponsible handling or serving of alcohol.

In 2007, Ofcom and the ASA commissioned joint research on children's exposure to alcohol advertising and their attitudes to it. The results, published in *Young People and Alcohol Advertising*, showed a decline between 2002 and 2006 in exposure of children to alcohol commercials on television.⁴ It also noted some positive indications of changes in behaviour.

Research commissioned by Ofcom

In March 2012, following the publication of the Government's Alcohol Strategy⁵, Ofcom commissioned analysis of children's exposure to TV alcohol advertising between 2007 and 2011, in order to provide more up to date evidence. The results of that research are set out in the remainder of this document. In the light of the Government's proposal that advertising should be excluded from programmes of 'high appeal' to children, Ofcom also commissioned analysis of the top 50 programmes by age group; the results are set out in Annex 2.

1.3 The changing context: viewing trends and advertising activity

Viewing trends

The average time children and young people spent watching television in 2011 ranged from 2.1 to 2.8 hours a day. The split in viewing between BBC/children's channels and 'adult'⁶ commercial airtime has remained fairly stable over the years with an almost 50/50 split among 4-15 year olds. 'Adult' commercial viewing is higher among 16-24 and 16-17 year olds, accounting for around three-quarters of viewing.

Children's viewing to 'adult' commercial airtime peaked during the 20:00-20:59 time slot in 2011 – this has shifted slightly since 2007 when viewing peaked between the 19:00-19:59 timeslot suggesting more children are watching later into the evening. Viewing to 'adult' commercial airtime increased gradually over the course of the day among 16-24 and 16-17 year olds, peaking later in the evening between 21:00-21:59.

In 2011, almost three-quarters of children's viewing took place pre-21:00 and just over a quarter took place post-21:00, with much of this during the first hour or so after 21:00. Among 16-24 and 16-17 year olds, over a third of viewing took place post-21:00.

As viewing to channels 3, 4 and 5 has declined over the years, viewing to their portfolio channels has increased. Over the analysis period viewing to sports, music and movie channels has remained fairly stable. Channels 3, 4 and 5 tend to dominate viewing during

⁴ *Young people and alcohol advertising*, Ofcom / ASA, November 2007
(http://stakeholders.ofcom.org.uk/binaries/research/tv-research/alcohol_advertising.pdf)

⁵ Government Alcohol Strategy, Home Office, March 2012
(<https://www.gov.uk/government/news/alcohol-strategy-published>)

⁶For definitions see section 2 Data and methodology

peak hours, while their portfolio channels represent a greater proportion of viewing post-21:00.

Supplementary analysis commissioned by Ofcom shows that many of the programmes attracting the largest audiences among children are programmes aimed largely at adult audiences shown in family viewing time (see Annex 2). Most of these programmes index below 120, and so may carry alcohol advertising, although not all do.

Spot advertising

In 2011, alcohol spots accounted for 2.0% of all commercial spots aired, compared with 1.6% in 2007. In 2011, 659,000 alcohol advertising television spots were aired – this is compared with 418,000 in 2007 and 748,000 in 2010. The distribution of alcohol spots increased gradually over the day, peaking during the post-21:00 period.

Almost half (49.1%) of all alcohol spots were broadcast between 06:00-20:59 in 2011, and this proportion has remained fairly stable over time. A further quarter (24.5%) of all alcohol spots were broadcast between 21:00-23:59, peaking during the 23:00-23:59 slot (8.5% of all alcohol spots).

While channels 3, 4 and 5 accounted for just over 1% of all alcohol spots in 2011, sports channels, music channels, and the channel 3, 4 and 5 portfolio channels each accounted for over 10% of all alcohol spots. In 2011, spot distribution varied across channels across the day with above average proportions of alcohol spots shown on portfolio and 'other' channels during pre-21:00 peak hours. Post-21:00 there was a marked increase in the proportion of spots accounted for by music channels.

Advertising expenditure

Alcohol advertising represented 2% of total UK advertising and total UK television advertising expenditure in 2011. Following a dip in expenditure during 2009, alcohol advertising spend increased on television and across the internet, with television accounting for almost half of all spend.

Compared with the split in advertising spend across all categories, alcohol advertisers apportion a greater share of spend to television, cinema and outdoor commercials.

Channels 3, 4 and 5 represented 45.4% of all alcohol television advertising spend in 2011. Over the analysis period, this share has declined, but the share of spend on the portfolio and sports channels has increased.

1.4 Changes in the amount of alcohol advertising seen by children and young people

In 2011, alcohol advertising accounted for 1.4% of all television advertising seen by children aged 4-15 and 2.2% of all advertising seen by 16-24 year olds; this figure varies across the day, rising to over 3% of commercial advertising seen post-21:00. The proportion of all commercial advertising seen that was represented by alcohol advertising ranged from 1.3% in 2009 to 1.7% in 2010 among children – among 16-24 year olds the share ranged from 1.9% in 2009 to 2.6% in 2010.

In 2007, 1.3bn impacts⁷ were seen by children aged 4-15, a share of 1.4% of all commercial advertising seen – this figure increased to 1.7bn impacts in 2010 (1.7% of all commercial advertising seen) followed by a small decline in 2011 to 1.4bn impacts (1.4% of all commercial advertising seen). In comparison, 1.7bn alcohol impacts were seen by 16-24 year olds in 2007 (2.1% of all television advertising seen) – this increased to 2.6bn impacts in 2010 and then fell slightly to 2.2bn impacts in 2011.

Figures suggest that in 2011 a child aged 4-15 watched, on average, 227 commercials each week and 3.2 of these were for alcohol products; in comparison, they watched 201 commercials a week in 2007 – 2.7 of which were for alcohol. Exploring the years in between show that in 2008 the figures increased from 2007 to 216 commercials per week and 3.3 of these were for alcohol. In 2009 the figures were 217 commercials per week of which 2.8 were for alcohol, with a rise again in 2010 up to 223 commercials per week of which 3.7 were for alcohol. Across the 5 years 2007-2011 on average children saw 217 commercials per week of which 3.2 were for alcohol.

Following trends in alcohol spot distribution by hour, children's alcohol impacts increase gradually over the course of the day, peaking between 21:00-21:59, with 17.5% of all alcohol impacts seen during this slot in 2011. Alcohol impacts peaked during the 22:00-22:59 slot in 2011 among young adults, accounting for 16.2% of all alcohol impacts seen by adults aged 16-24 and 15.9% of alcohol impacts seen by 16-17 year olds.

While half of all alcohol spots (49.1%) in 2011 were aired pre-21:00, 56.4% of alcohol impacts among 4-15 year olds were seen before 21:00 – a further 37.7% were seen between 21:00-23:59. In 2007 56.2% of alcohol impacts for 4-15 year olds were seen before 21:00 and 38.8% were seen between 21:00-23:59. Driven by differences in viewing habits, over half of alcohol advertising seen by 16-24 and 16-17 year olds was seen post-21:00.

With increased viewing among children to portfolio channels, these channels also account for an increasing proportion of alcohol impacts. In 2011, portfolio channels represented a fifth (20.2%) of viewing to commercial channels compared with just over a quarter (26.7%) of alcohol impacts; similarly, sports channels accounted for less than 5% of viewing and 10.3% of impacts.

Among young adults, the share of alcohol impacts seen across channels 3, 4 and 5 has similarly declined since 2007 – at the same time the share represented by portfolio and 'other' channels has increased. Among both 16-24 and 16-17 year old groups, portfolio channels accounted for a greater proportion of alcohol impacts than channels 3, 4 and 5 in 2011.

When compared with the distribution of impacts across the entire day, in 2011 channels 3, 4 and 5 accounted for above average proportions of alcohol impacts during peak hours – post-21:00 there was an increase in the share of impacts seen across the portfolio and music channels.

1.5 Comparative analysis

Daypart trends

Analysis of trends by daypart suggests that while children's viewing tails off after 21:00, a substantial audience continues to view, particularly in the first hour between 21:00-21:59.

⁷ An 'advertising impact' is a measure of viewing to an advertisement. For example, ten impacts could be achieved by ten people viewing a single advertisement, by one person seeing the advertisement ten times, or by five people seeing the advertisement twice, etc.

Viewing among 16-24 year olds peaks between 21:00-21:59 and continues later into the night than among children. At the same time, the volume of alcohol advertising shown increases post- 21:00. It is likely that this combination of continued viewing and the increase in the volume of spot advertising post- 21:00 is driving the level of impacts seen after 21:00, particularly during the 21:00-21:59 time slot.

Channel group trends

Looking more closely at the effect of the channels on which alcohol advertising is shown suggests that while channels 3, 4 and 5 accounted for 1.3% of all alcohol spots in 2011, they account for the greatest share of viewing among children and adults aged 16-24 – and in turn a significant proportion of alcohol impacts.

Channels within the 3, 4 and 5 portfolio channels group accounted for 10.8% of alcohol spots - they also accounted for a fifth of children's viewing and over a quarter of viewing among 16-24 year olds. The increasing popularity of these channels along with the level of advertising shown is likely to have resulted in the increase in the proportion of alcohol impacts seen across this channel group.

While sports channels accounted for less than 5% of viewing among children and 16-24 year olds, they accounted for around 10% of alcohol impacts in 2011. This is likely to have been as a result of the relatively high share of alcohol spots (13.7%) shown across this channel group. Overall, music channels accounted for over 10% of alcohol spots and around 5% of viewing but less than 4% of alcohol impacts – so while these channels show a relatively high proportion of spots, the level of viewing to these channels does not result in a similar share of impacts.

Channel group by daypart

By combining daypart and channel group trends we find that that a combination of effects is driving the peak in exposure to alcohol advertising during the evening and, in particular, post- 21:00. These trends appear to be driven by three key channel groups; channels 3, 4 and 5; the 3, 4 and 5 portfolio channels and music channels.

- a) **Channels 3, 4 and 5** – While the share of spots shown on these channels is relatively low, they account for high levels of peak-time viewing. Therefore it is likely that trends in viewing are resulting in above-average proportions of alcohol impacts seen across these channels in the evening.
- b) **3, 4 and 5 portfolio channels** – The above average proportion of impacts shown across this channel group is driven by a combination of above-average proportions of spots being shown and viewing taking place on these channels during peaktime, particularly post- 21:00.
- c) **Music channels** – Viewing to music channels during the evening peak accounts for below-average levels when compared with viewing across the whole day. However post- 21:00 there is a significant increase in the proportion of spots shown on these channels and it is likely that this increase in advertising activity rather than viewing levels is driving the above-average share of impacts shown across this channel group during peak, particularly post- 22:00.

1.6 Conclusions

The research shows a gradual decline in the exposure of older children (those aged 10-15) to TV alcohol advertising (identified in previous research⁸) from 2002 to 2006. Between 2007 and 2011, exposure fluctuated significantly but did not return to the level achieved in 2006, and in some years was significantly higher (see figure 56).

While the absolute increase in alcohol impacts amongst all children was modest – on average, children saw just over three alcohol adverts a week in 2011 (3.2 adverts per week) as against 2.7 in 2007 (see section 1.4) – the percentage increase was significant. It seems likely that a variety of factors has driven these changes:

- a) there has been a shift in viewing by children away from channels with no or relatively less advertising to channels with more such advertising, and this has increased their exposure to all forms of advertising, including alcohol (see figures 9 and 24);
- b) most viewing by older children is to adult programmes, not children's programmes. Children watch adult programmes in large numbers, but very rarely constitute a sufficient proportion of the audience to trigger rules excluding alcohol advertising (see Annex 2);
- c) viewing by older children to adult commercial channels now peaks after 9pm, when there is a greater concentration of alcohol advertising (see figure 18) – just under 25% of alcohol spots appear in the three hours from 9pm (see figure 38); and
- d) there has been a general increase in the number of commercial channels on air (194 in 2007 vs. 207 in 2011) and in turn an increase in the number of total advertising spots. In 2007 there were 25.6m total advertising spots, this increased to 32.8m in 2011 (see figure 33). Total alcohol spots increased from 418,000 in 2007 to 659,000 in 2011 (fluctuating year on year – rising to as high as 748,000 in 2010 see figure 34).

1.7 Next steps

Given the changes in children's viewing habits, and continuing concerns about the impact on children of exposure to alcohol advertising (much of which appears in media other than television), we believe it is important to look again at whether the current arrangements remain appropriate. We consider that there are two particular issues that warrant consideration.

First, is the current approach to identifying which programmes should exclude alcohol advertising working properly? In the course of carrying out the research, it became apparent from BARB data that there were a number of instances where alcohol adverts had been inserted in programmes that indexed at 120 or above. Ofcom has referred this data to the ASA and asked it to investigate these instances as a matter of urgency.

Aside from any compliance action that may be warranted, it is clearly important to understand how this may happen, what corrective measures might make application of the rules more consistent, and whether there are circumstances in which it is impracticable to apply the rules.

Second, in the light of changing viewing habits and the Government's call for alcohol advertisements to be excluded from programmes of 'high appeal' to children, is the current approach sufficiently comprehensive?

⁸ http://stakeholders.ofcom.org.uk/market-data-research/other/tv-research/alcohol_advertising/

Ofcom has therefore asked BCAP and the ASA to review the effectiveness of the current regulation of alcohol advertising in the light of the research, both as regards enforcement and whether it adequately reflects the changing circumstances of children's viewing. Ofcom has asked BCAP to set out its preliminary recommendations in October 2013.

Section 2

Data & methodology

2.1 Introduction

This section sets out the methodologies used in assessing trends in exposure to alcohol advertising. The analysis examines three specific areas to provide a comprehensive review of recent trends:

- a) the viewing habits of children and young people;
- b) the amount of alcohol advertising aired across commercial channels and trends in advertising expenditure across media; and
- c) the amount of alcohol advertising seen by children and young people.

Where data are available, the analysis presented is based on annual data for the years 2007-2011.

2.2 Overview of analysis

The changing context: viewing trends & advertising activity

To understand trends in advertising exposure we need to understand the viewing environment and how changes in television viewing provide some context in which to analyse these trends. We have looked at changes in the amount of television watched, the types of channels watched and how viewing changes across the course of the day.

Viewing analysis is based on audience data from the British Audience Research Bureau (BARB) and data has been generated using the Kantar Media *Infosys* system. Data has been analysed for the following demographic groups:

- a) Children aged 4-15
- b) Children aged 4-9
- c) Children aged 10-15
- d) Adults aged 16-24
- e) Adults aged 16-17

The demographic group of 'adults aged 16-17' is not a standard BARB audience and has been defined by Ofcom for the purposes of this analysis to provide an understanding of trends among young adults below the legal drinking age. As this age group consists of two year-groups, the results should be treated with some caution due to possible low sample sizes. Furthermore, a new BARB panel was introduced in January 2010 and, as a result, comparison of pre- and post-panel change data must be treated with caution.

In addition to looking at viewing trends, it is important to understand how the advertising environment has changed. We have looked at trends in advertising activity based on two measures: the volume of 'spot' advertising on television and advertising expenditure.

'Advertising spots' are a measure of the number of commercials aired on television – an 'advertising spot' means one occasion on which an advertisement is broadcast. Analysis of spots provides some context with regards to how the volume of advertising broadcast has changed and the impact this has on the amount of advertising viewed. This data has been sourced from the Nielsen Media *TV Monitor* system and covers periods from 2007-2011.

The spots analysis looks at trends in alcohol advertising in the context of all television advertising, trends in the scheduling of alcohol spots across the day and the volume of alcohol spots shown by channel group. In order to avoid multiple counting of spots across the terrestrial channels which are measured by television regions, we base the spots analysis on a representative region for each channel.

We also look briefly at trends in advertising expenditure across all media and across channel groups on television. This data is sourced from the Nielsen Media *Ad Dynamix* database and covers periods from 2008-2011 (the database is a 'rolling' database and at the time of conducting the analysis the system did not hold full year data for 2007 and therefore this period was excluded). The database provides estimates on advertising spend based on industry data.

While analysis of advertising expenditure can provide a useful measure of where advertising is increasing or decreasing, particularly across media, some caution should be exercised in interpreting these figures as changes may be a result of changing advertising costs rather than the volume of advertising.

Changes in the amount of alcohol advertising seen by children and young people

While advertising spots provide a measure of the amount of advertising *shown*, we assess 'advertising impacts' as a measure of the advertising *seen*. An 'advertising impact' is a measure of viewing to a commercial spot. For example, ten impacts could be achieved by ten people viewing a single advertisement, by one person seeing the advertisement ten times, or by five people seeing the advertisement twice, etc. In this review, impacts are added together to give a measure of exposure to particular types of advertising. Impacts data is assessed on a demographic basis.

In the main, the analysis of impacts is based on BARB data sourced from the Nielsen Media *TV Monitor* database and looks at annual data from 2007-2011. This database provides detailed impacts figures for children aged 4-15, children aged 4-9, children aged 10-15 and adults aged 16-24. The system does not provide impacts data for adults aged 16-17 and while impacts data for those aged 16-24 can provide a steer on how exposure among young adults has changed, this age group includes those above and below the legal drinking age.

To provide some insight into trends in impacts among 16-17 year olds, we have sourced this data from the Kantar Media *Infosys* system. As mentioned above, the demographic group of 'adults aged 16-17' is not a standard BARB audience and has been defined by Ofcom for the purposes of this analysis: as this age group consists of two year-groups the results should be treated with some caution due to possible low sample sizes.

The analysis of advertising exposure is examined in detail by time of day and channel groups across the five age groups. Given the commercial spots and impacts data for children and adults aged 16-24 have been sourced from Nielsen Media, these two datasets can be compared. However the impacts data for 16-17 year olds has been analysed in isolation as this is sourced from a different database (Kantar Media).

As with the assessment of viewing trends, the 'advertising spots' and 'impacts' analysis pre- and post-BARB panel change in 2010 must be treated with caution. Viewing and impacts data for all five age groups is analysed and presented within this report. Where it is important to highlight trends across each age group, charts are presented in the main body (Section 4 and Section 5) – and where key trends are similar across all age groups, some charts will be presented in Annex 1 to avoid repetition of analysis.

2.3 Data definitions: Unit, category & channel definitions

Unit definitions

A number of terms are used throughout the report which are defined below:

Adult commercial airtime

The definition of 'adult' commercial airtime excludes all BBC channels and all commercial children's channels.

Advertising spots

These are a measure of the number of commercials aired on television – an 'advertising spot' means one occasion on which an advertisement is broadcast. Analysis of spots provides some context with regards to how the volume of advertising broadcast has changed and the impact this has on the amount of advertising viewed.

Advertising impacts

An 'advertising impact' is a measure of viewing to a commercial spot. For example, ten impacts could be achieved by ten people viewing a single advertisement, by one person seeing the advertisement ten times, or by five people seeing the advertisement twice, etc. In this review, impacts are added together to give a measure of exposure to particular types of advertising. Impacts data is assessed on a demographic basis.

Category definitions

The advertising expenditure, spots and impacts data is sourced from Nielsen Media databases. Nielsen Media reports advertising data on all products and categories. In order to undertake this analysis of alcohol advertising, we defined the 'Alcohol' category based on the sub-categories listed below (Figure 1). All analysis was conducted based on Nielsen Media 'product categories' as opposed to 'advertiser categories' as this captures alcohol advertising based on the product being advertised rather than the advertiser – this is particularly relevant with regards to supermarket advertising.

Figure 1: Nielsen Media alcohol sub-categories

Nielsen Media categories	
04.05 Spirits & Liqueurs (All sub-categories):	04.06 Wine (All sub-categories):
Brandy & Cognac	Champagne
Cocktails	Fortified/dessert Wine*
Gin	Red
Liqueurs	Rose
Port	Sparkling

Ready Mixed/Alcopops	White
Rum	Wine - Multi Product
Sherry*	
Spirits & Liqueurs Multi Prod	04.07 Beer, Lager & Cider (All sub-categories):
Spirits Other	Alcohol Free Beer Lager Cider
Tequila	Ales & Bitters
Vermouth*	Beer Lager Cider - Multi Prod*
Vodka	Cider/Perry
Whisky/whiskey	Lagers
	Stouts
	Drink – Multi Product:
	Alcohol-multi product

*These sub-categories only feature in analysis across all media – there is no recorded television activity across these sub-categories during the analysis period.

The impacts data for adults aged 16-17 is sourced from Kantar Media. While the data reported is based on the same source (BARB audience data) the figures reported by Nielsen Media and Kantar Media may differ due to variations in data processing and classification. The following sub-categories have been used to define the 'Alcohol' category for the analysis conducted using the Kantar Media *Infosys* system (Figure 2).

Figure 2: Kantar Media alcohol sub-categories

Kantar Media :Infosys categories		
Spirits & Liqueurs	Wine	Alcoholic Drinks
Cocktails	Champagne	Alcohol Free Beer & Lager
Gin	Sparkling	Alcoholic Drinks Range
Liqueurs	White	Alcopops
Ready Mixed/Alcopops	Wine - Multi Product	Beer
Rum		Brandy
Spirits & Liqueurs Multi Prod	Beer, Lager & Cider	Cider & Perry
Spirits Other	Ales & Bitters	Gin
Tequila	Cider/Perry	Lager
Vodka	Lagers	Liqueurs & Spirits
Whisky/whiskey	Stouts	Rum
		Stout
	Drink – Multi Product:	Vermouth
	Alcohol-multi product	Vodka
		Whisky/Whiskey
		Wine

Channel group definitions

To provide detailed analysis of viewing, spots and impacts it is useful to look at how trends vary by channel. Given the large number of channels available to viewers across television platforms we have created channel groups to provide an insight into any such variations.

The viewing analysis looks at trends in viewing across all channels. To look in further detail at how viewing trends may have had an effect on exposure to alcohol advertising we look at

viewing during 'adult' commercial airtime as BBC channels are not advertiser-funded and children's channels do not carry alcohol advertising.

The channel group, 'BBC channels', consists of the following channels (Figure 3):

Figure 3: Channel group definition: BBC channels

BBC channels
BBC1 (HD+SD)
BBC2
BBC3
BBC4
BBC HD
BBC News
BBC Parliament
CBeebies
CBBC

The channel group, 'Children's channels', consists of the following channels (Figure 4):

Figure 4: Channel group definition: Children's channels

Dedicated children's channels		
Baby TV	Disney Cinemagic +1	Nicktoons
Boomerang	Disney Junior	Nicktoons Replay
Boomerang+1	Disney Junior Plus	Nicktoonster
Cartoon Network	Disney XD	Pop
Cartoon Network Too	Disney XD+1	Pop+1
Cartoonito	Kix!	Pop Girl
Discovery Kids	Nick Jr	Pop Girl+1
Disney Channel	Nick Jr2	Tiny Pop
Disney Channel +1	Nickelodeon	Tiny Pop+1
Disney Cinemagic	Nickelodeon Replay	CITV

The definition of 'adult' commercial airtime excludes all BBC channels and all children's channels as listed in the above figures. Analysis of 'adult' commercial airtime is then further detailed by the following channel groups:

- a) Channels 3, 4 and 5
- b) 3, 4 and 5 portfolio channels (excluding CITV)
- c) Sports channels
- d) Music channels
- e) Movie channels
- f) Other/mixed genre channels

It should be noted that no programme genre or daypart filter is applied to the above channel groups (a-f). Therefore, while children's channels have been excluded from the definition of 'adult' commercial airtime, any children's programming shown across the above channel groups will be included in the viewing analysis. As alcohol products are restricted from

advertising during children's programming, there will not be any alcohol spots or impacts during any children's programming on these channels.

The channels included in each of the groups are set out below in Figure 5 and Figure 6:

Figure 5: Channel group definition: Channels 3, 4 and 5

Channels 3, 4 and 5 main commercial PSB channels	3, 4 and 5 Portfolio channels/ Commercial PSB Portfolio channels	
ITV1	ITV1 +1	E4
ITV1 HD	CITV*	E4 +1
Channel 4 (inc HD)	ITV2 (inc HD)	Film4
Five (inc HD)	ITV2 +1	Film4 +1
	ITV3 (inc HD)	More 4
	ITV3 +1	More 4 +1
	ITV4 (inc HD)	Five +1
	ITV4 +1	5*
	Ch4 +1	5* +1
	4Music	5 USA
		5 USA +1

*excluded in analysis of 'adult' airtime

Figure 6: Channel group definition: Sports, Music & Movie channels

Sports Channels	Music Channels	Movies Channels
attheraces	Bedroom TV	Horror Channel
ESPN	Bliss	Horror Channel+1
ESPN America	Brit Hits	Men & Movies
ESPN Classic	Bubble Hits	Men & Movies +1
Eurosport	BuzMuzik	MGM HD
Eurosport 2	Channel AKA	Movies 24
Eurosport HD	Channel Starz	Movies 24 +1
Extreme Sports Channel	Chart Show TV	Movies4Men
Fight Network	Chart Show TV +1	Movies4Men+1
Golf TV	Clubland TV	Movies4Men2
LFC TV	Dance Nation TV	Movies4Men2 +1
Motors TV	Flava	Simple Movies
MUTV	Greatest Hits TV	Sky Box Office (Movies)
Racing UK	Kerrang	Sky Movies 10
Setanta Golf	Kiss TV	Sky Movies 9
Setanta Sports 1	Magic TV	Sky Movies Action & Adventure
Setanta Sports 2	MTV	Sky Movies Classics
Setanta Sports News	MTV +1	Sky Movies Comedy
Sky Premiership Plus	MTV Base	Sky Movies Crime & Thriller
Sky Sports 1	MTV Classic	Sky Movies Drama & Romance
Sky Sports 2	MTV Dance	Sky Movies Family
Sky Sports 3	MTV Hits	Sky Movies Indie
Sky Sports 4	MTV Live HD	Sky Movies Modern Greats
Sky Sports F1	MTV Music	Sky Movies Premiere
Sky Sports News	MTV Rocks	Sky Movies Premiere +1
SportsXchange	Musflash TV	Sky Movies Sci-Fi/Horror
	NME TV	Sky Movies Showcase
	OMusic	Sony Movies

	p-rock	Sony Movies +1
	Q Channel	TCM (Turner Classic Movies)
	Rock-on TV	TCM 2
	Rockworld TV	True Movies 1
	Scuzz	True Movies 2
	Smash Hits	World Movies TV
	The Box	
	The Vault	
	VH1	
	Vintage TV	
	Viva	
	Massive R&B	

The channel group 'Other/mixed genre channels' consists of all other channels i.e. excluding BBC channels, children's channels and the above channel groups.

Section 3

The changing context: viewing trends and advertising activity

3.1 Introduction

Changes in the viewing habits of children and young people, as well as the volume of advertising activity may affect exposure to alcohol advertising. Looking at these two areas can help provide some context within which we can assess any changes in exposure. For example, growth in viewing to commercial channels may result in increased exposure to advertising, as may an increase in the number of commercials aired.

This section examines trends in viewing habits, the amount and distribution of television advertising for alcohol products and trends in advertising expenditure across all media.

3.2 Key findings

Viewing trends

- a) The average time spent by children and young people watching television ranged from 2.1 to 2.8 hours a day in 2011.
- b) The split in viewing between BBC/Children's channels and 'adult' commercial airtime has remained fairly stable over the years with an almost 50/50 split among 4-15 year olds.
- c) 'Adult' commercial viewing is higher among 16-24 and 16-17 year olds, accounting for around three-quarters of viewing.
- d) Children's viewing to 'adult' commercial airtime peaked during the 20:00-20:59 time slot in 2011 – this has shifted slightly since 2007 when viewing peaked between the 19:00-19:59 timeslot.
- e) Viewing to 'adult' commercial airtime increases gradually over the course of the day among 16-24 and 16-17 year olds, peaking between 21:00-21:59.
- f) In 2011, almost three-quarters of children's (aged 4-15) viewing took place pre-21:00 and just over a quarter took place post-21:00 – this figure fell to 21.3% among 4-9 year olds and rose to 31.1% among 10-15 year olds.
- g) Among 16-24 and 16-17 year olds, a higher proportion of viewing took place post-21:00 (37.3% and 35.8% respectively in 2011).
- h) As viewing to channels 3, 4 and 5 has declined over the years, viewing to the portfolio channels has increased. Over the analysis period viewing to sports, music and movie channels has remained fairly stable. Channels 3, 4 and 5 tend to dominate viewing during peak hours, while portfolio channels represent a greater proportion of viewing post-21:00.

Spot advertising

- a) In 2011, 659,000 alcohol advertising television spots were aired – this is compared with 418,000 in 2007 and 748,000 in 2010. In 2011, alcohol spots accounted for 2.0% of all commercial spots aired compared with 1.6% in 2007 and 2.3% in 2010. The distribution of alcohol spots increases gradually over the day, peaking during the post-21:00 period.
- b) In 2011, 49.1% of all alcohol spots were broadcast between 06:00-20:59 and this proportion has remained fairly stable over time – a further 24.5% of spots were broadcast between 21:00-23:59.
- c) While channels 3, 4 and 5 accounted for just over 1% of all alcohol spots in 2011, sports channels, music channels and the portfolio channels each accounted for over 10% of all alcohol spots.
- d) In 2011, spot distribution varied across channel groups across the day with above average proportions of alcohol spots shown on portfolio and 'other' channels during pre-21:00 peak hours when compared with spot distribution across the entire day. Post-21:00 there was a stark increase in the proportion of spots accounted for by music channels.

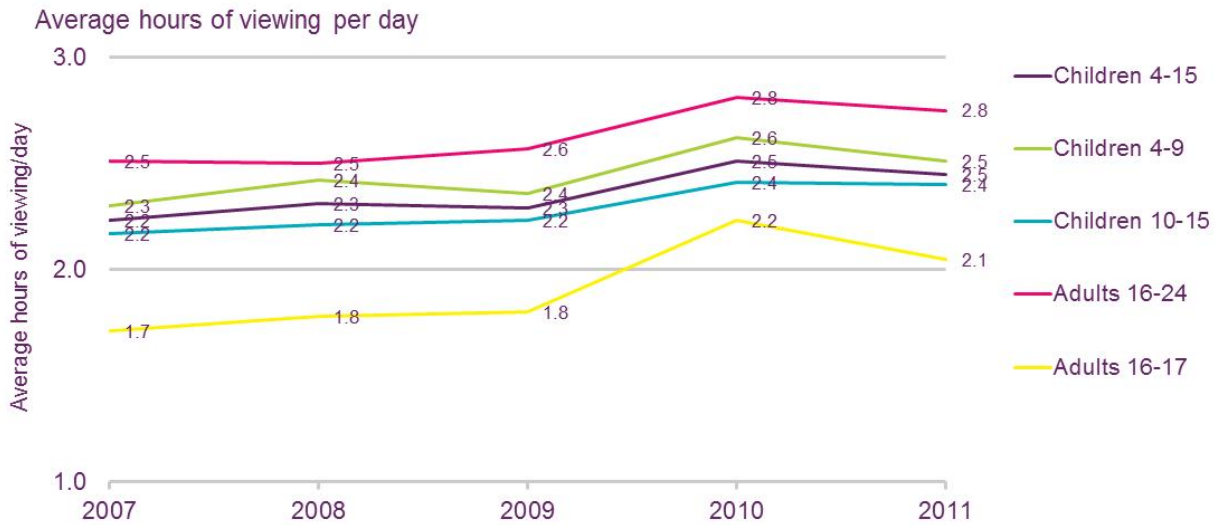
Advertising expenditure

- a) Alcohol advertising represented 2% of total UK advertising and total UK television advertising expenditure in 2011.
- b) Following a dip in expenditure during 2009, alcohol advertising spend increased on television and across the internet – with television accounting for almost half of all spend.
- c) Compared with the split in advertising spend across all categories, alcohol advertisers apportion a greater share of spend to television, cinema and outdoor commercials.
- d) Channels 3, 4 and 5 represented 45.4% of all alcohol television advertising spend in 2011 – and as this share has declined over the analysis period the share of spend on the portfolio and sports channels has increased.

3.3 Viewing trends

The amount of television watched by children and young people ranged from 2.1 hours to 2.8 hours per day in 2011 (Figure 7). In 2011, children aged 4-15 watched 2.5 hours per day, 16-17 year olds watched 2.1 hours and those aged 16-24 watched 2.8 hours per day. There has been a slight upward trend in the time spent viewing television – although some caution should be taken when comparing trend data before and after the BARB panel change in 2010.

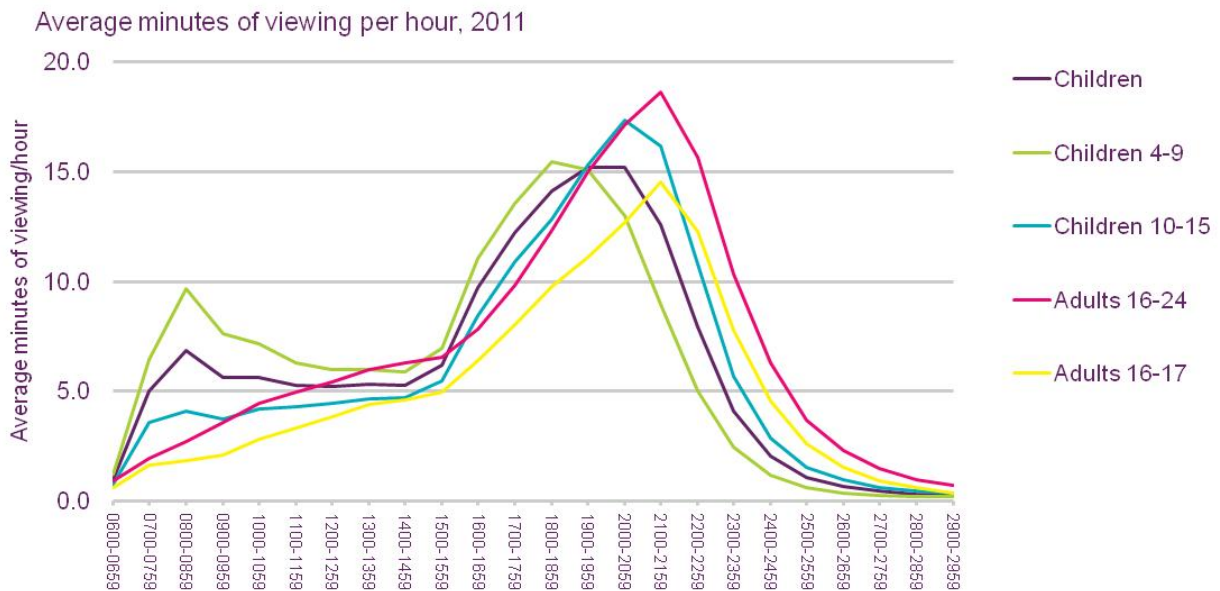
Figure 7: Average hours of television viewing per day - By age group



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

Viewing varies across the day with children's viewing peaking during the morning, particularly among younger children, and then again during the early evening as they return home from school. Among 4-9 year olds television viewing falls away earlier in the evening than those aged 10-15 years, whose viewing peaks between 20:00-20:59. Viewing among young adults peaks later in the evening (21:00-21:59) and continues later into the night than children (Figure 8).

Figure 8: Average minutes of viewing per hour, 2011



Source: BARB

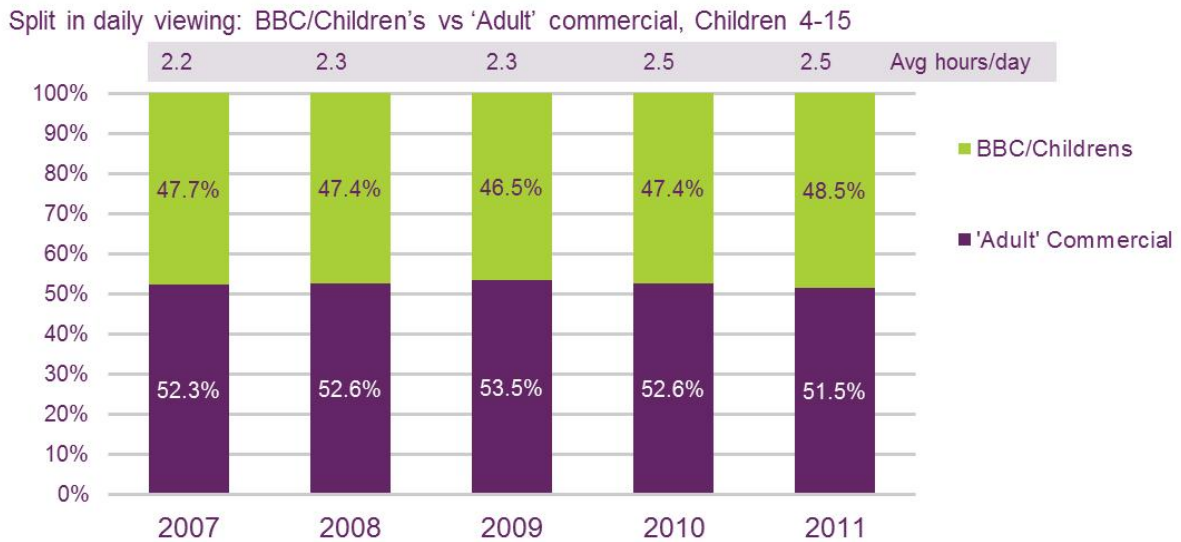
Viewing split by BBC/children's channels vs. 'adult' commercial channels

To look in further detail at how viewing trends may have had an effect on exposure to alcohol advertising we look at viewing during 'adult' commercial airtime as BBC channels are

not advertiser-funded and children's channels do not carry alcohol advertising. Here we look at how total viewing is split between BBC/children's channels and 'adult' commercial channels.

The split in children's television viewing between BBC & dedicated children's channels and 'adult' commercial airtime has remained fairly stable over the analysis period with an almost 50:50 split (Figure 9).

Figure 9: Split in daily viewing- BBC/children's vs. 'adult' commercial channels, Children 4-15



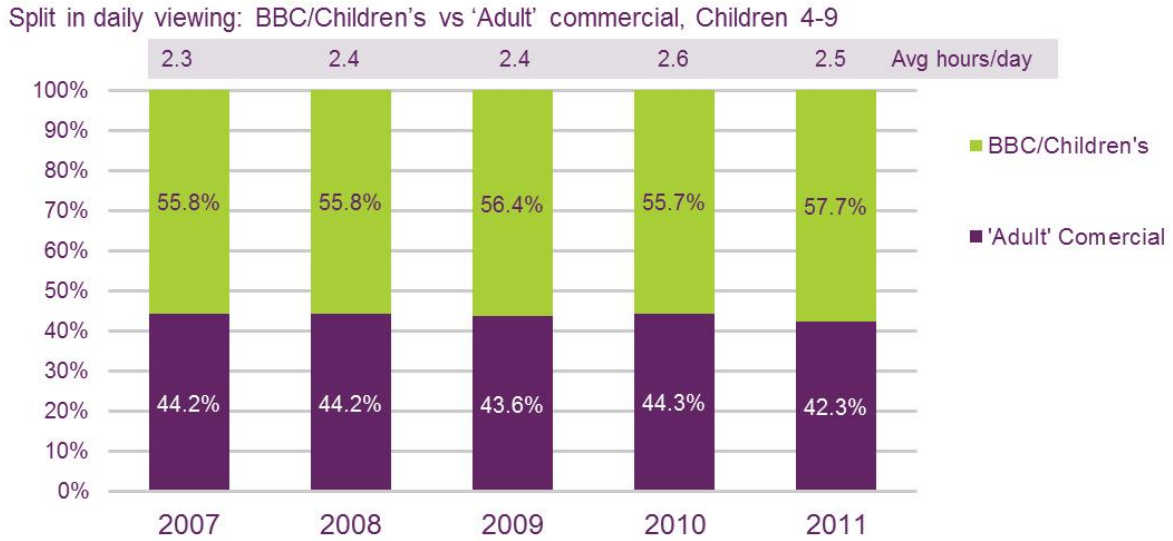
Source: BARB. BBC/Children's=All BBC channels and all children's channels.
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

BBC channels and children's dedicated channels account for a greater proportion of viewing among younger children aged 4-9, representing 57.7% of their viewing in 2011 (Figure 10) compared with 48.5% of viewing among children aged 4-15 and 39.1% of viewing among 10-15 year olds (Figure 11).

In 2011, 'adult' commercial airtime represented 42.3% of viewing by 4-9 year olds compared with 51.5% of viewing among all children aged 4-15. Viewing during 'adult' commercial airtime rose to 60.9% among children aged 10-15 year olds.

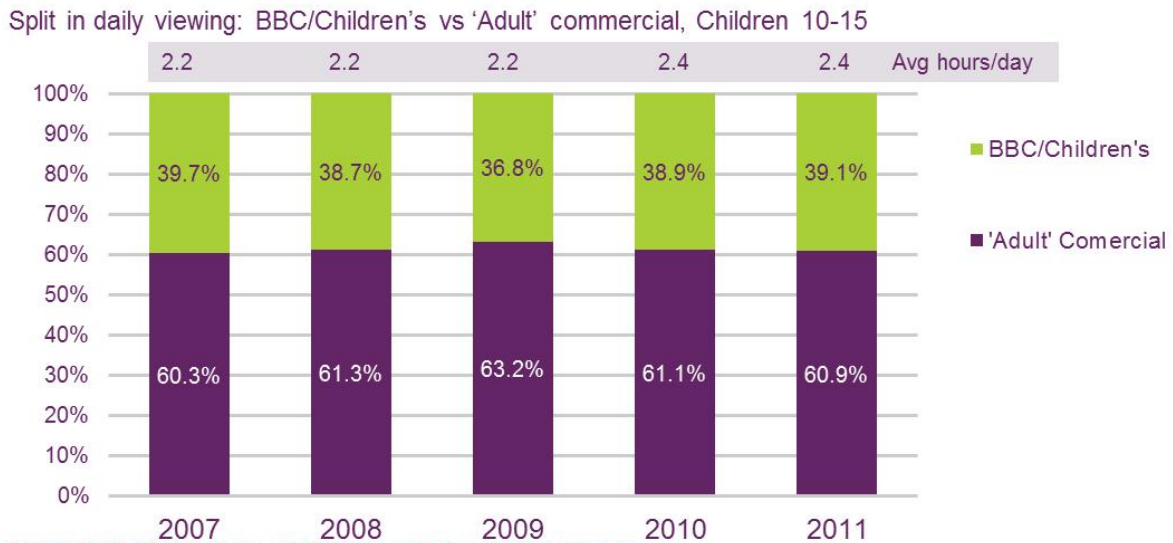
These trends are likely to be driven by the differences in the type of programming watched with younger viewers more likely to be watching children's programming, including that shown on BBC children's channels and older children watching more 'adult' programming as they stay up later in the evening (Figure 8).

Figure 10: Split in daily viewing- BBC/children's vs. 'adult' commercial channels, Children 4-9



Source: BARB. BBC/Children's=All BBC channels and all children's channels.
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

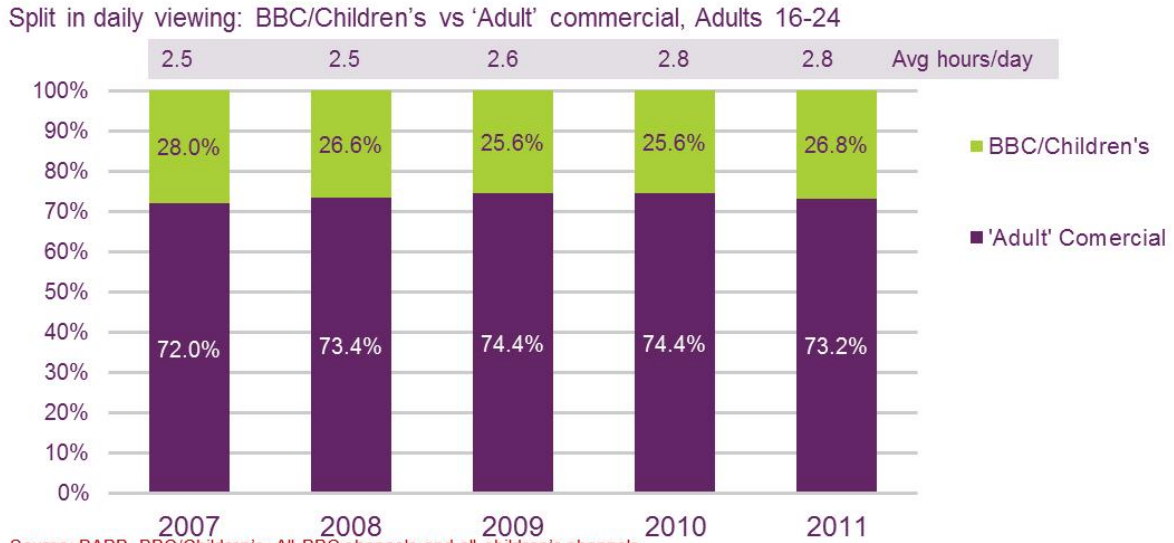
Figure 11: Split in daily viewing- BBC/children's vs. 'adult' commercial channels, Children 10-15



Source: BARB. BBC/Children's=All BBC channels and all children's channels.
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

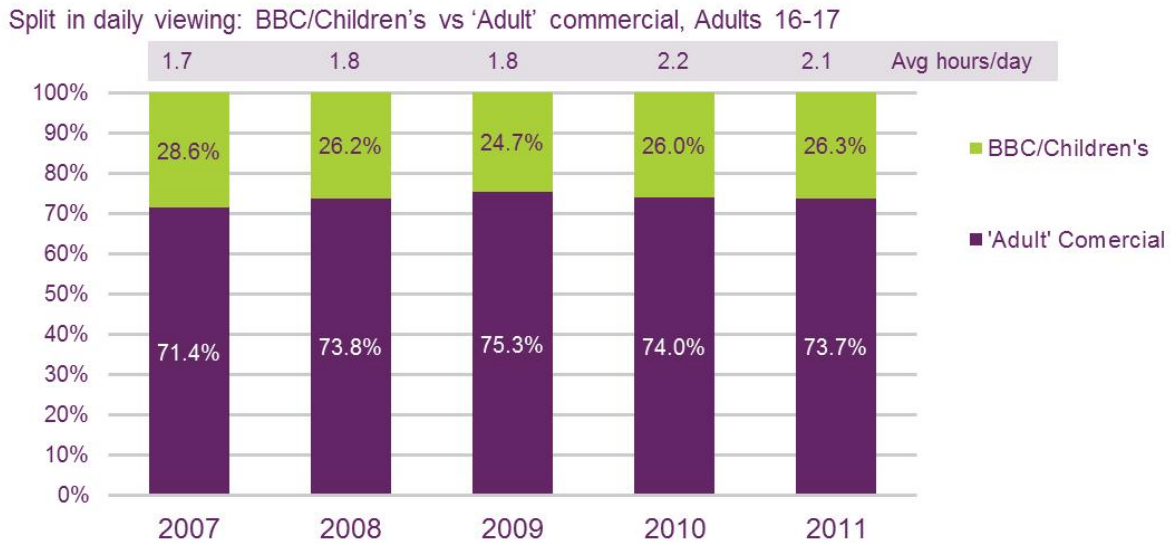
Among 16-24 year olds and those aged 16-17 years, 'adult' commercial viewing rises significantly compared with children, accounting for almost three-quarters of viewing (Figure 12 and Figure 13), compared with 51.5% of children's viewing (Figure 9). This proportion has remained fairly stable over the past five years.

Figure 12: Split in daily viewing- BBC/children's vs. 'adult' commercial channels, Adults 16-24



Source: BARB. BBC/Children's=All BBC channels and all children's channels.
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 13: Split in daily viewing- BBC/children's vs. 'adult' commercial channels, Adults 16-17

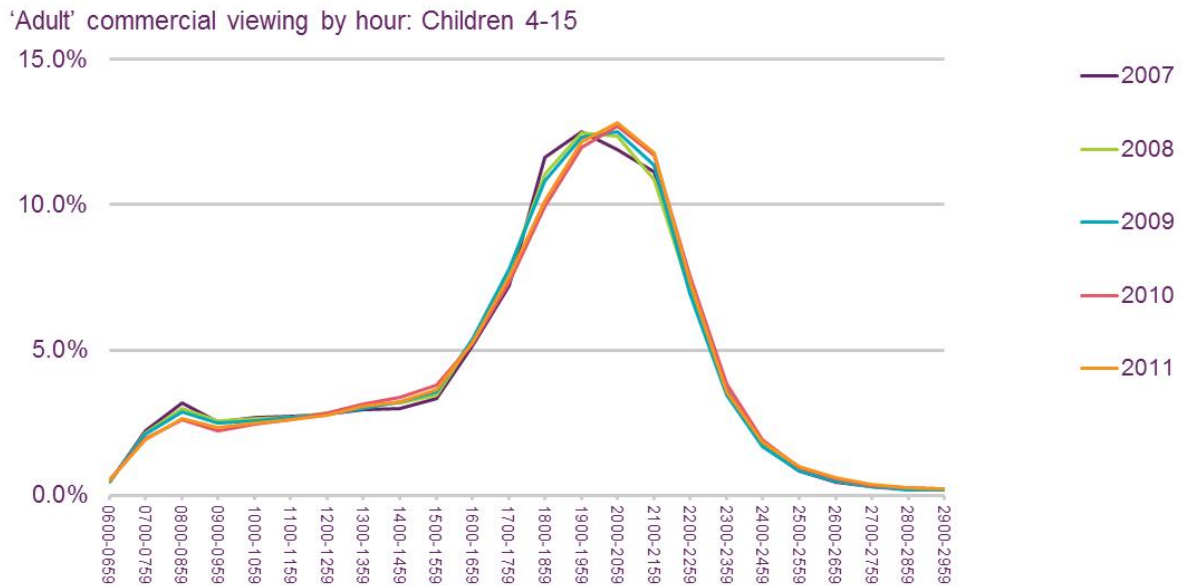


Source: BARB. BBC/Children's=All BBC channels and all children's channels.
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Viewing to 'adult' commercial channels across the day

Viewing among 4-15 year old children to 'adult' commercial channels peaks during the early evening (Figure 14). Figure 14 shows the proportion of a child's total viewing that took place in each clock hour between 2007 and 2012. In 2007, children's viewing peaked between 19:00-19:59; with this timeslot accounting for 12.5% of the day's viewing. This peak has shifted since 2009 and in 2011 their viewing peaked during the 20:00-20:59 timeslot – with 12.8% of the day's viewing taking place during that hour.

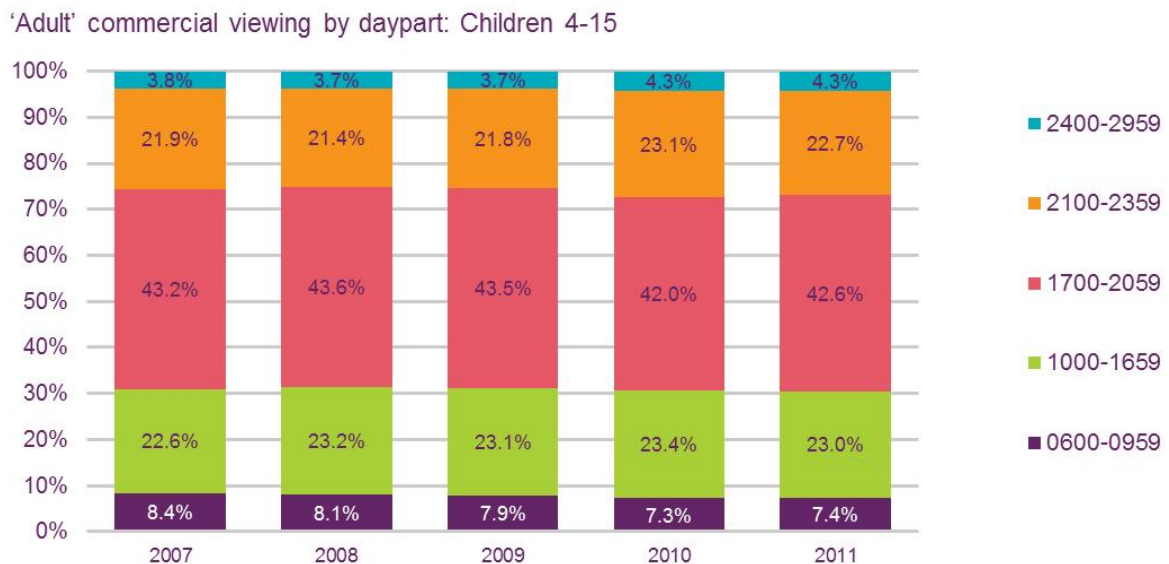
Figure 14: Viewing to 'adult' commercial channels by hour, Children 4-15



Source: BARB – Analysis excludes BBC channels and Children's channels – As a proportion of total 'adult' commercial viewing
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

By combining hourly data into dayparts Figure 15 shows that, in 2011, while the majority (73.0%) of children's 'adult' commercial viewing took place pre-21:00, just over a quarter (27.0%) of their daily viewing in 2011 took place after 21:00 (Figure 15). As Figure 14 shows, much of this viewing is likely to be taking place during the first hour or so post-21:00 as viewing begins to fall away later in the night.

Figure 15: Viewing to 'adult' commercial channels by daypart, Children 4-15

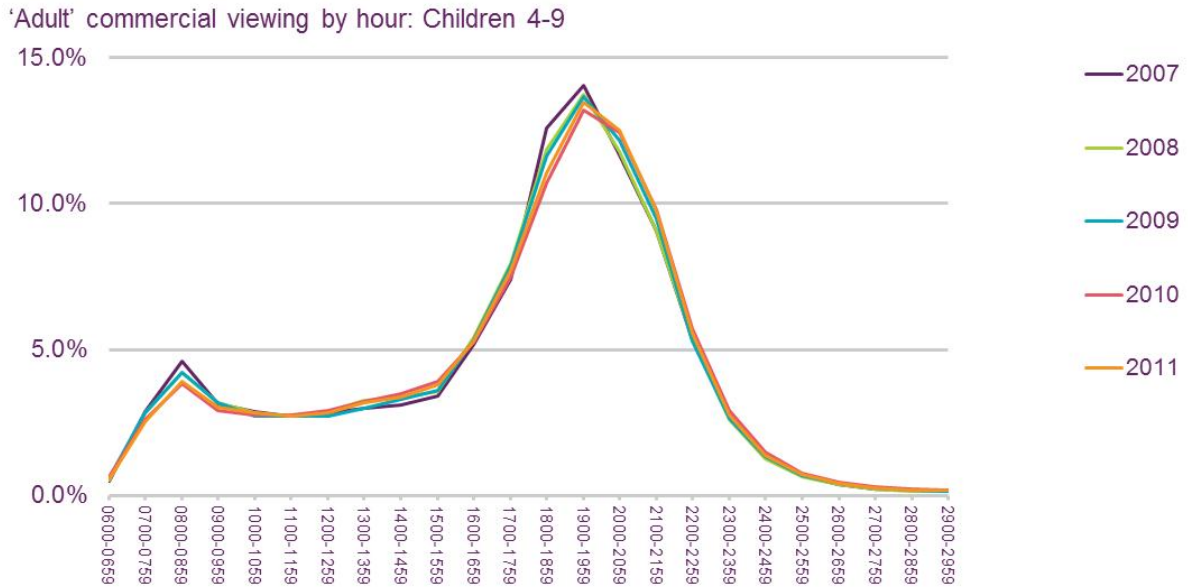


Source: BARB – Analysis excludes BBC channels and Children's channels
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Similarly, 'adult' commercial viewing across children aged 4-9 increases during the evening, although their viewing peaks during the earlier slot of 19:00-19:59 - 13.5% of the day's viewing took place at this time in 2011 (Figure 16). Figure 17 also shows that a greater

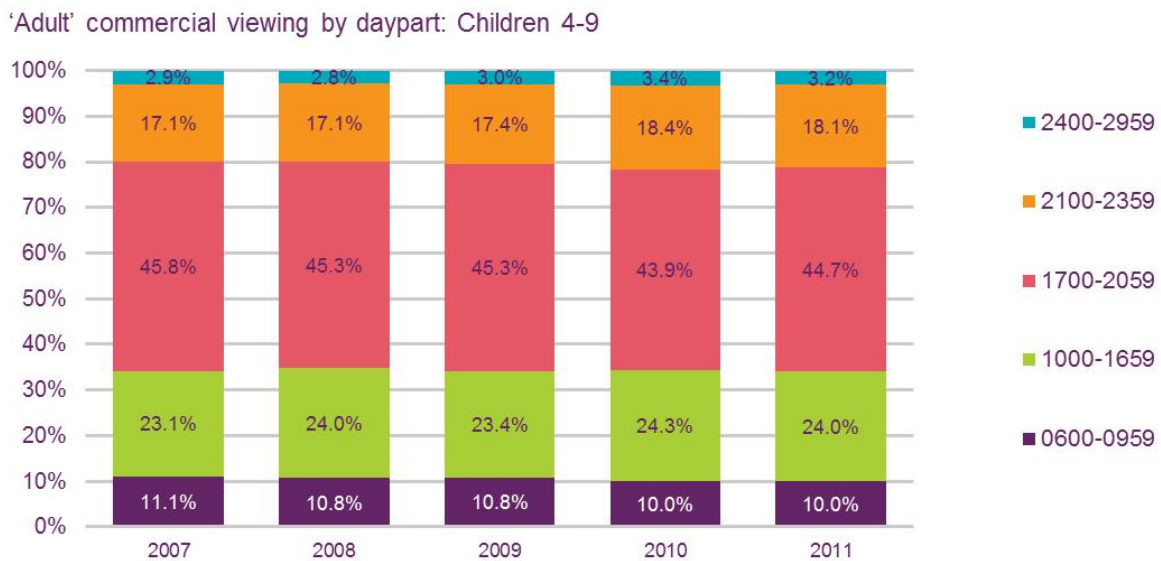
proportion of viewing among 4-9 year olds takes place during the early morning and pre-21:00 (78.7% in 2011). In 2011 21.3% of their viewing took place after 21:00.

Figure 16: Viewing to 'adult' commercial channels by hour, Children 4-9



Source: BARB – Analysis excludes BBC channels and Children's channels – As a proportion of total 'adult' commercial viewing
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

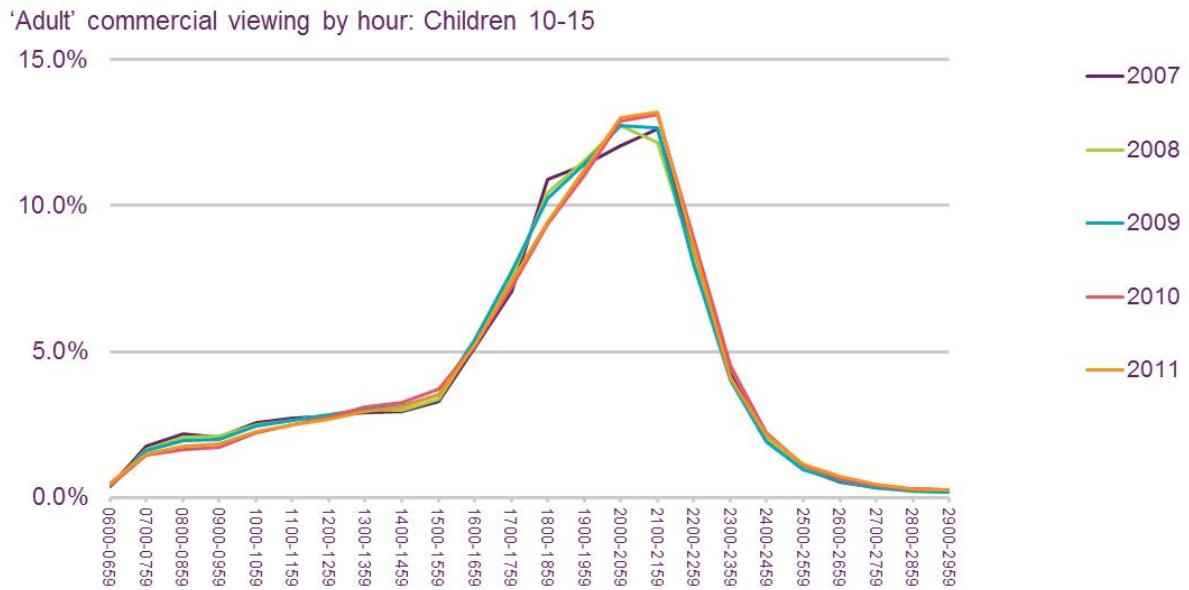
Figure 17: Viewing to 'adult' commercial channels by daypart, Children 4-9



Source: BARB – Analysis excludes BBC channels and Children's channels
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

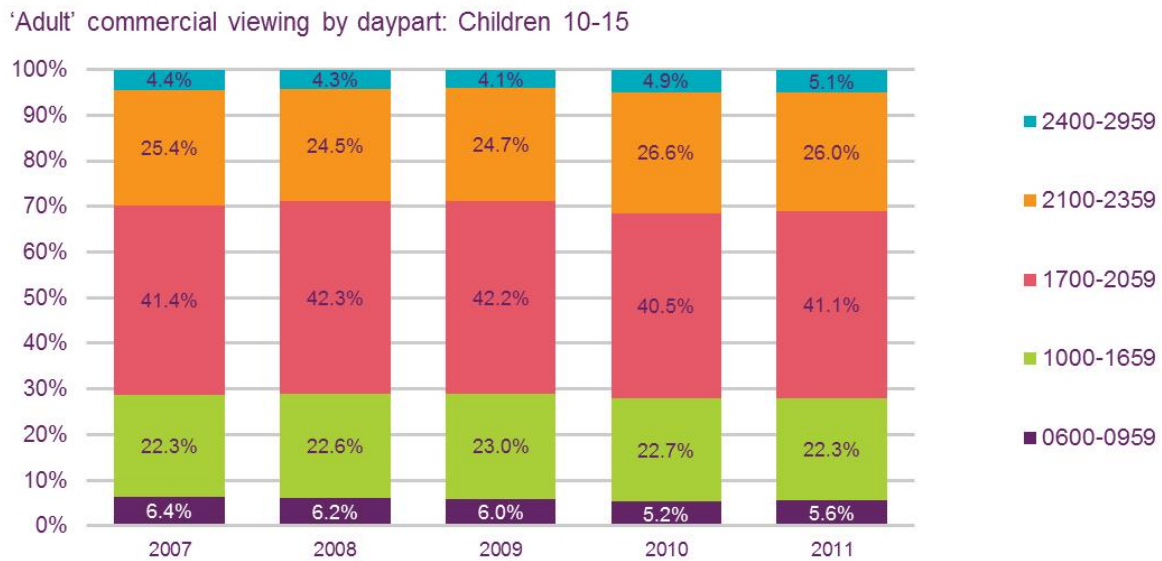
Viewing to 'adult' commercial channels among older children (10-15 years) peaks later in the evening between 21:00-21:59 (Figure 18) - this slot accounted for 13.2% of their daily viewing in 2011. Viewing continues later into the night with 31.1% of their daily viewing in 2011 taking place post- 21:00 (Figure 19), compared with 21.3% of 4-9 year olds viewing.

Figure 18: Viewing to 'adult' commercial channels by hour, Children 10-15



Source: BARB – Analysis excludes BBC channels and Children's channels – As a proportion of total 'adult' commercial viewing
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

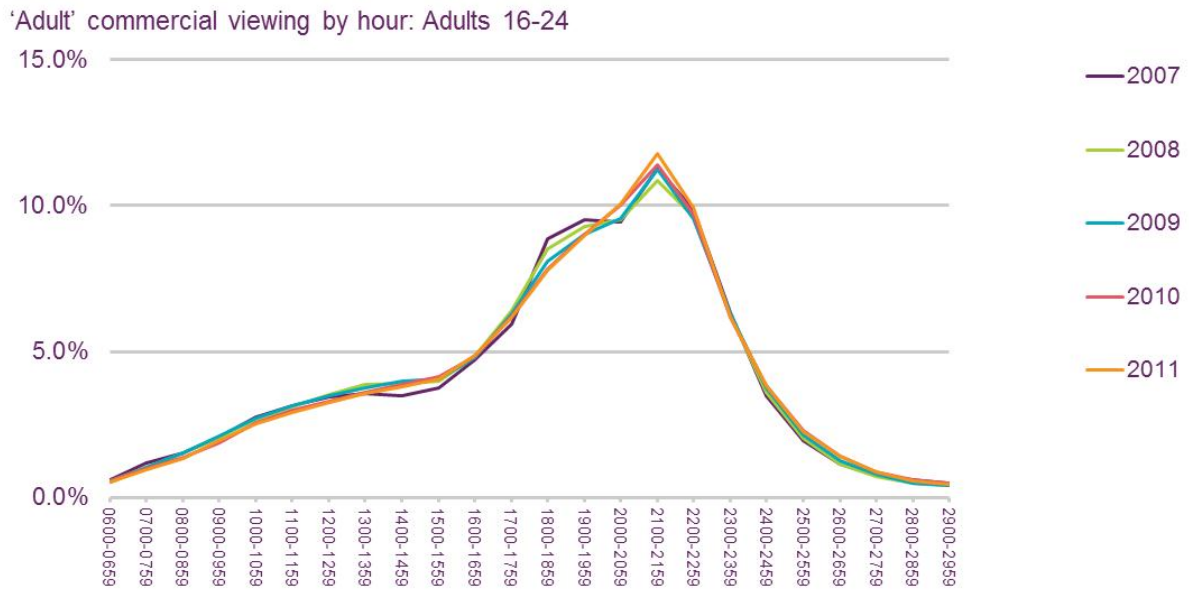
Figure 19: Viewing to 'adult' commercial channels by daypart, Children 10-15



Source: BARB – Analysis excludes BBC channels and Children's channels
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

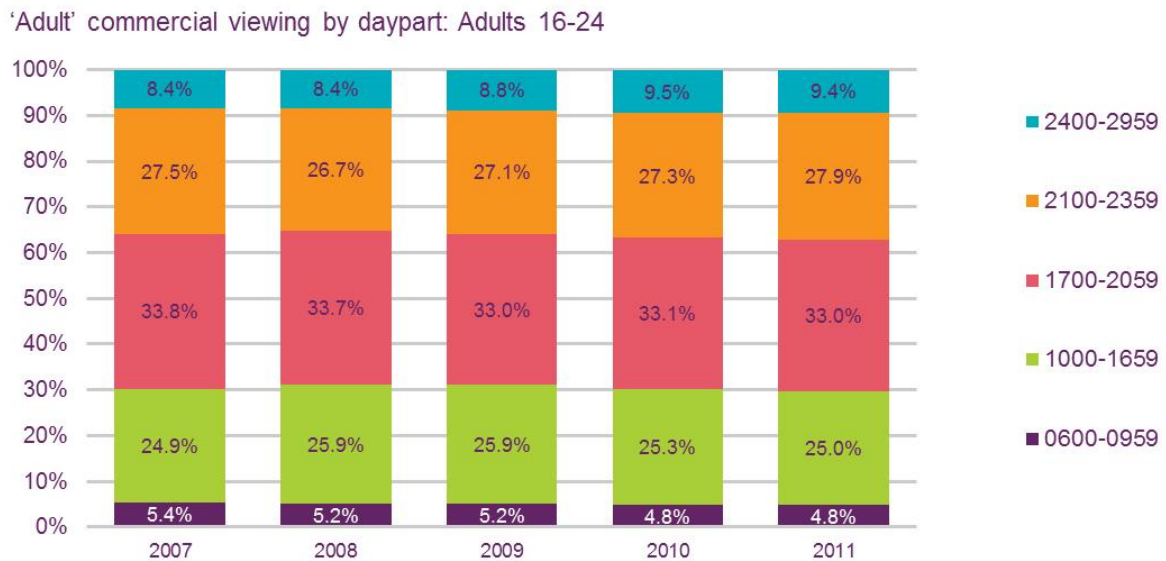
Daily viewing to 'adult' commercial channels among 16-24 year old adults follows a different pattern to that of children, increasing gradually over the course of the day, peaking between 21:00-21:59 and declining gradually post-22:00 (Figure 20). Daypart analysis shows, that among 16-24 year olds, pre-21:00 viewing accounts for 62.8% of viewing in 2011, with 37.3% of viewing taking place post-21:00 (Figure 21).

Figure 20: Viewing to 'adult' commercial channels by hour, Adults 16-24



Source: BARB – Analysis excludes BBC channels and Children's channels – As a proportion of total 'adult' commercial viewing
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

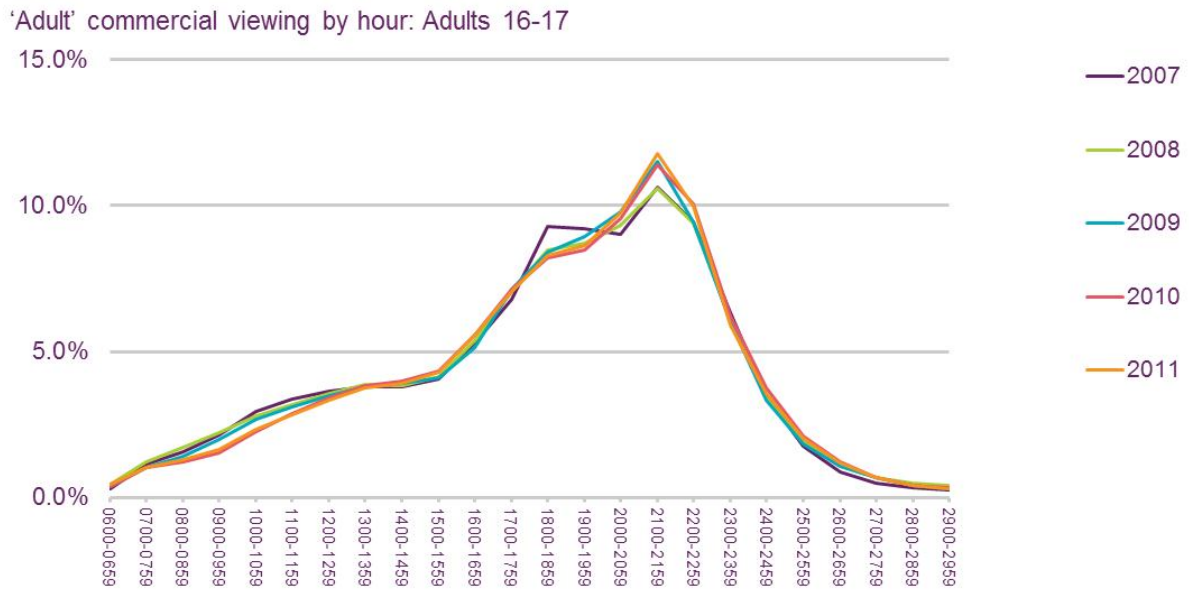
Figure 21: Viewing to 'adult' commercial channels by daypart, Adults 16-24



Source: BARB – Analysis excludes BBC channels and Children's channels
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

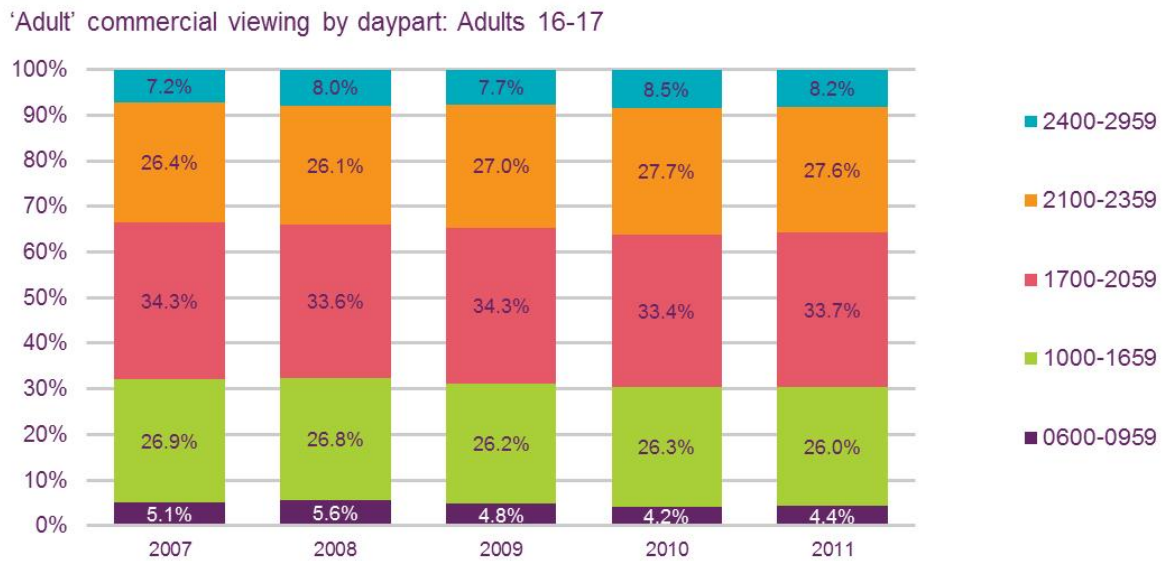
Similar patterns of viewing as 16-24 year olds are seen for those aged 16-17, with viewing peaking during the 21:00-21:59 timeslot and over a third (35.8%) of viewing in 2011 taking place after 21:00 (Figure 22 and Figure 23).

Figure 22: Viewing to 'adult' commercial channels by hour, Adults 16-17



Source: BARB – Analysis excludes BBC channels and Children's channels – As a proportion of total 'adult' commercial viewing
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 23: Viewing to 'adult' commercial channels by daypart, Adults 16-17



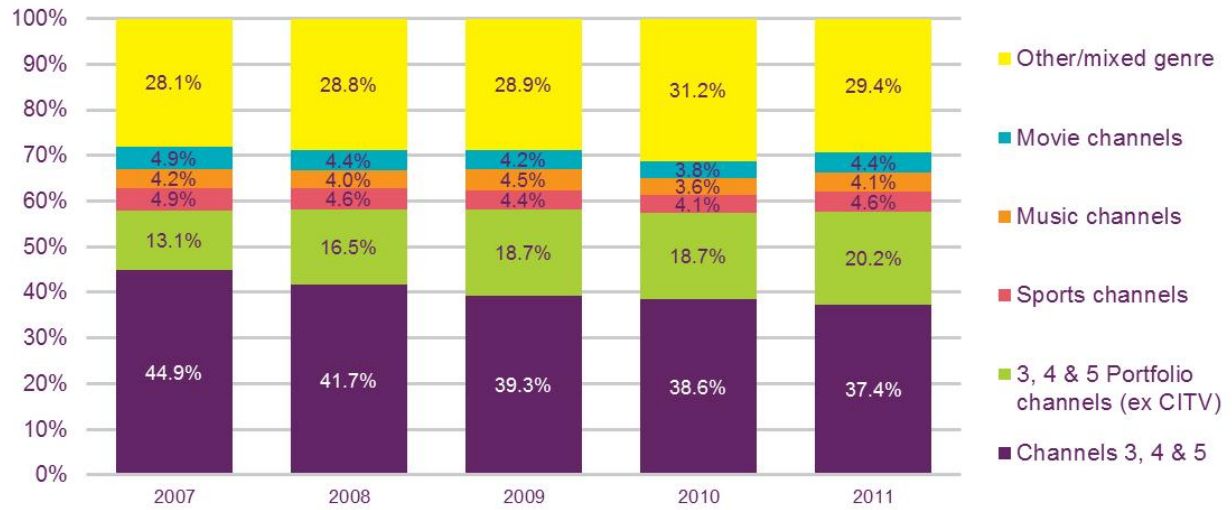
Source: BARB – Analysis excludes BBC channels and Children's channels
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

'Adult' commercial viewing by channel groups

Analysis of children's 'adult' commercial viewing by channel group shows that, as their viewing to channels 3, 4 and 5 has declined, viewing to the portfolio channels has increased with channels owned by the PSB channels continuing to account for just under 60% of all viewing. Viewing to sports, music and movie channels has remained fairly stable over the analysis period (Figure 24). Similar trends are noted among 4-9 year olds and 10-15 year olds – corresponding charts can be found in Annex 1 (Figure 79 and 80).

Figure 24: 'Adult' commercial viewing by channel group, Children 4-15

Viewing by channel group: 'Adult' commercial viewing, Children 4-15

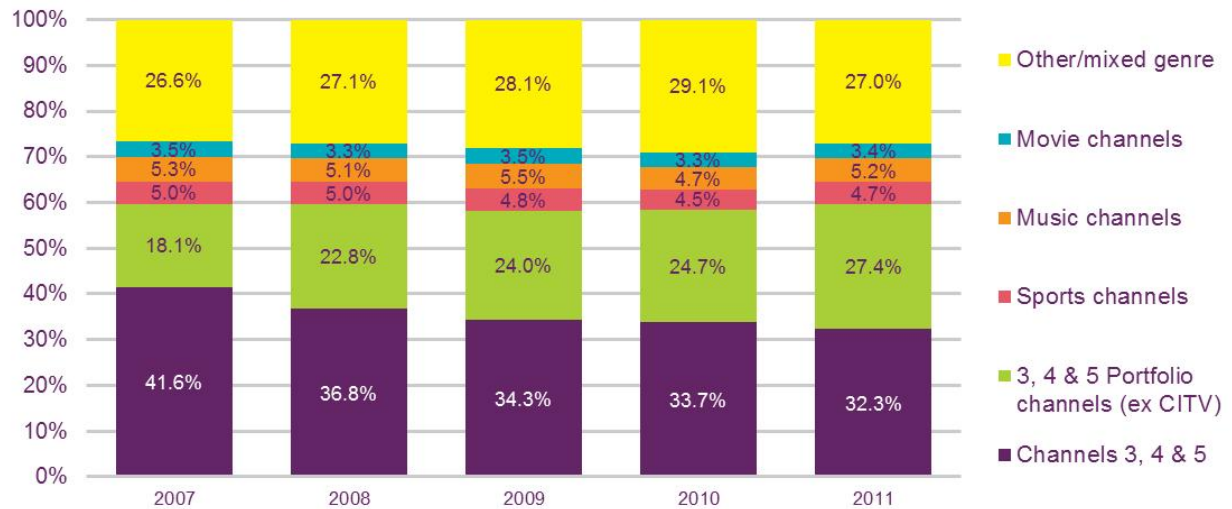


Source: BARB- Analysis excludes BBC channels and Children's channels
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Matching trends across children's viewing, as 'adult' commercial viewing among 16-24 year olds to channels 3, 4 and 5 has declined there has been an increase in viewing to the portfolio channels (Figure 25). However, these channels account for a higher proportion of viewing among young adults than among children, representing 27.4% of viewing in 2011 compared with 20.2% of children's viewing in 2011. Overall, the proportion of viewing accounted for by PSB-owned channels has remained stable at around 60%.

Figure 25: 'Adult' commercial viewing by channel group, Adults 16-24

Viewing by channel group: 'Adult' commercial viewing, Adults 16-24

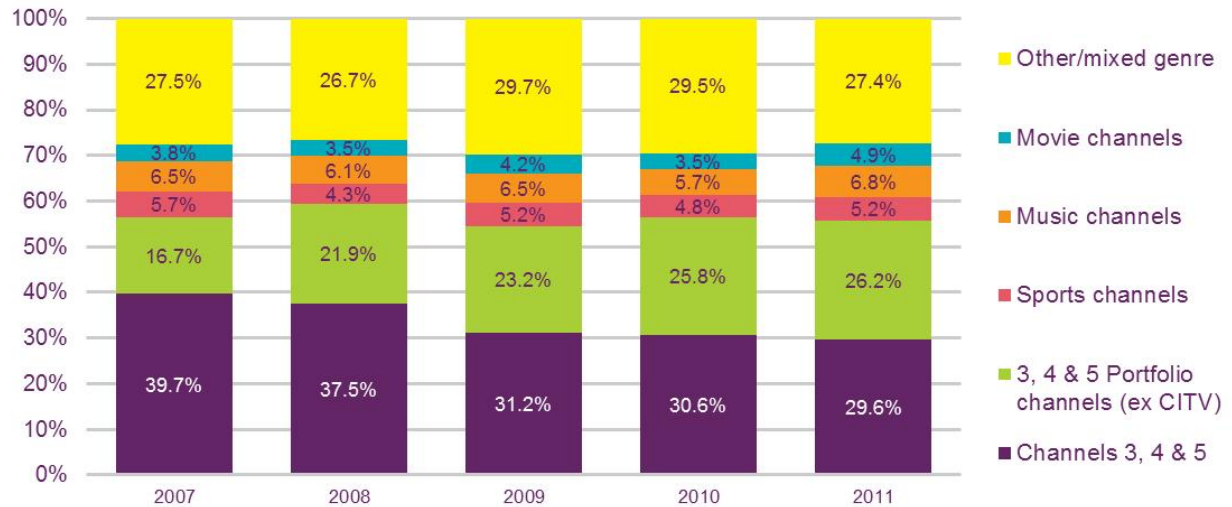


Source: BARB- Analysis excludes BBC channels and Children's channels
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

While similar trends are noted among 16-17 year olds, channels 3, 4 and 5 account for a lower proportion of viewing compared with 16-24 year olds. Music channels also account for a marginally higher proportion of viewing among 16-17 year olds (Figure 26).

Figure 26: 'Adult' commercial viewing by channel group, Adults 16-17

Viewing by channel group: 'Adult' commercial viewing, Adults 16-17

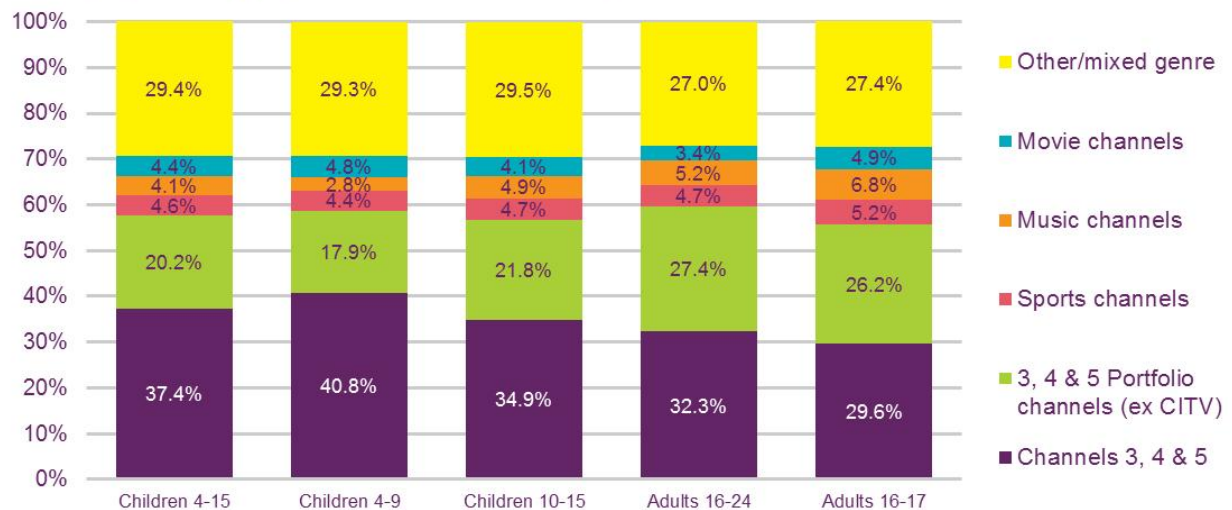


Source: BARB- Analysis excludes BBC channels and Children's channels
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

In summary, viewing to the PSB-owned channels varies by age group with the proportion of 'adult' commercial viewing represented by channels 3, 4 and 5 falling as age increases and portfolio channels gaining share as age increases (Figure 27). Other/mixed genre channels accounted for a similar share of viewing across the demographic groups.

Figure 27: 'Adult' commercial viewing by channel group - By age group, 2011

Viewing by channel group: 'Adult' commercial viewing, 2011



Source: BARB- Analysis excludes BBC channels and Children's channels

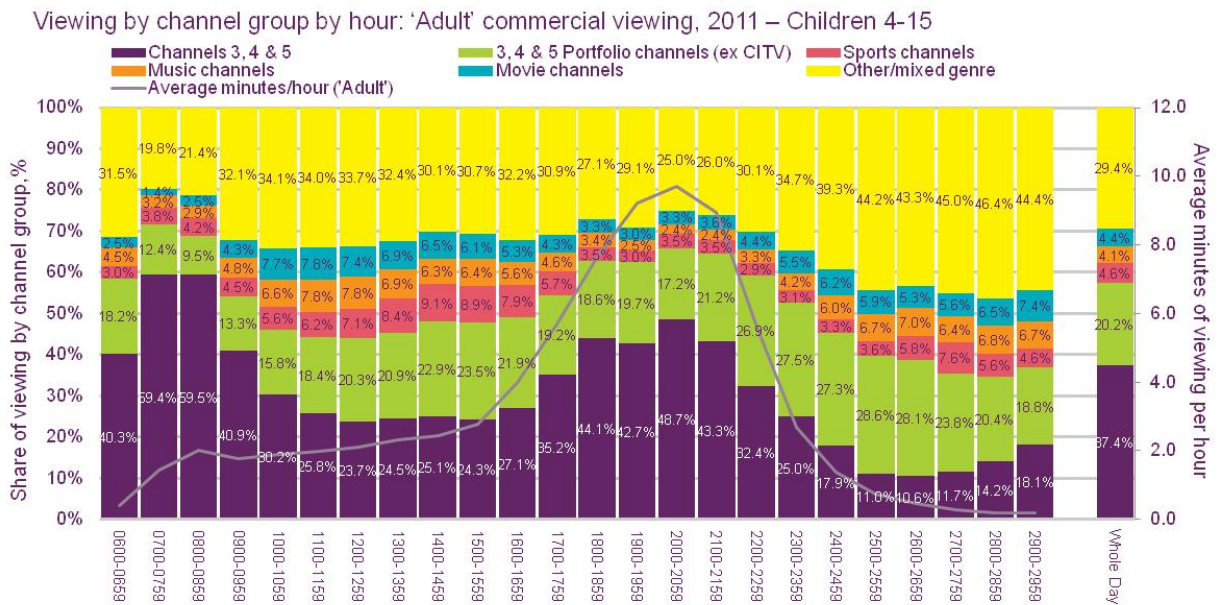
'Adult' commercial viewing by channel by hour

In order to understand trends in exposure to alcohol advertising in detail, we have looked at data for viewing, the scheduling of spots and advertising impacts by channel group by hour. This analysis enables us to further understand exposure during specific times of the day by examining particular channels that may be driving these trends.

Figures 28-32 show how each demographics viewing during 'adult' commercial airtime is broken down by channel group during each hour of the day. The 'whole day' bar sets out how each demographics viewing is split across the entire day – providing an 'average' against which to compare the hourly data.

As Figure 28 shows, when children's viewing to 'adult' commercial channels peaked during the evening, channels 3, 4 and 5 accounted for over 40% of viewing in 2011 – this is higher than the proportion of the entire day's viewing accounted for by these channels (37.4%). Post-21:00, children's viewing moved towards the portfolio channels, with these channels accounting for above-average shares of viewing (greater than 20%) during this time compared with the 'whole day' share (20.2%).

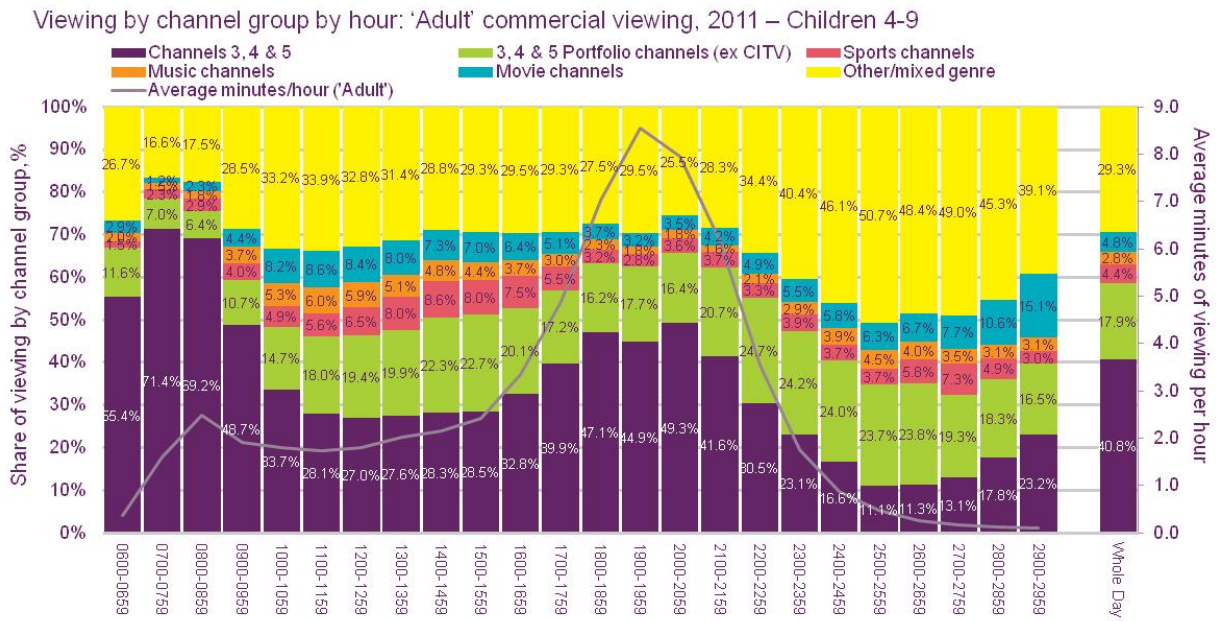
Figure 28: 'Adult' commercial viewing by channel group by hour, Children 4-15 - 2011



Source: BARB – Analysis excludes BBC channels and Children's channels

Similarly, children aged 4-9 watched above average proportions of channels 3, 4 and 5 during the evening peak (greater than 40%) compared with the 'whole day' average (40.8%). While overall viewing fell post-21:00, those who were viewing were watching above-average shares (compared with the 'whole day') of portfolio and 'other' channels (Figure 29).

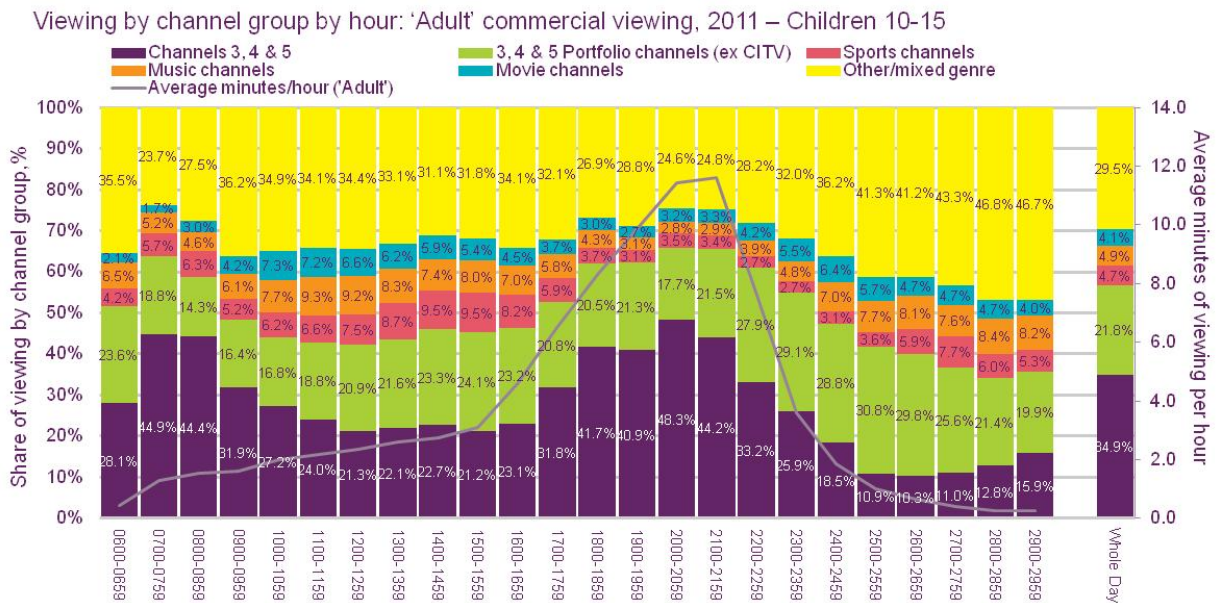
Figure 29: 'Adult' commercial viewing by channel group by hour, Children 4-9 - 2011



Source: BARB – Analysis excludes BBC channels and Children's channels

Similar trends are noted when looking at the viewing of children aged 10-15, although as already seen their viewing tails off later in the evening than 4-9 year olds (Figure 30).

Figure 30: 'Adult' commercial viewing by channel group by hour, Children 10-15 - 2011



Source: BARB – Analysis excludes BBC channels and Children's channels

Viewing of 'adult' commercial channels by channel group by hour follows similar patterns when looking at young adults (16-24 and 16-17 year olds), although the distribution of viewing is different with a greater proportion of viewing taking place in the evening and later at night. Given the scheduling of events, sports channels account for a greater proportion of viewing during the day while music and movie channels represent above average shares (compared with the 'whole day') of viewing during the daytime and later at night (Figure 31 and Figure 32).

Figure 31: 'Adult' commercial viewing by channel group by hour, Adults 16-24 - 2011

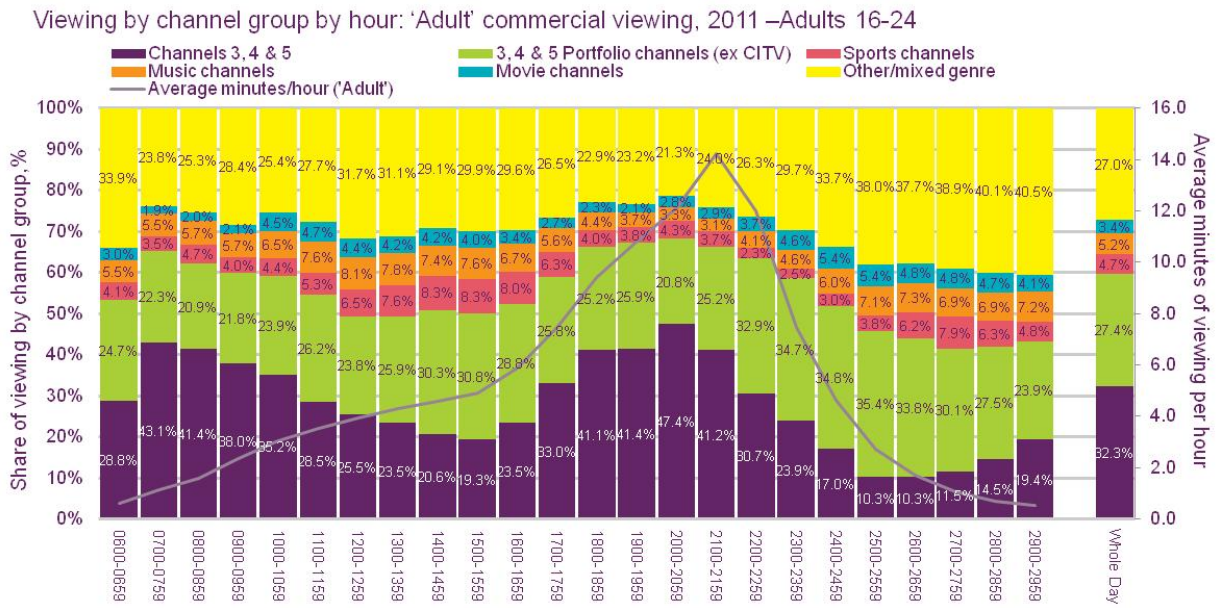
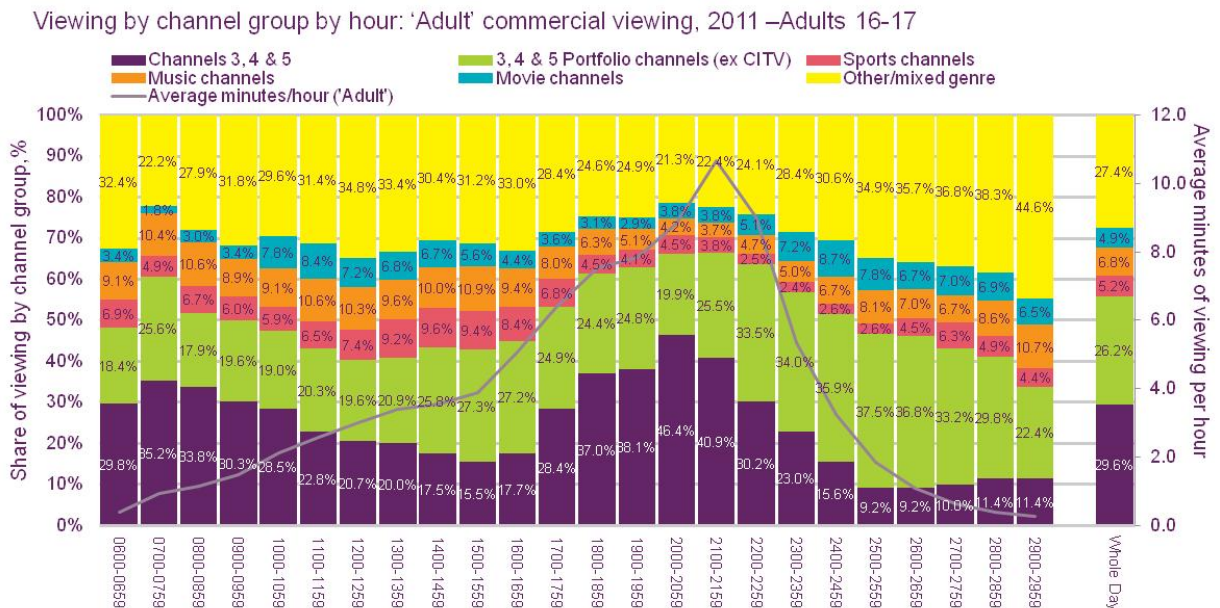


Figure 32: 'Adult' commercial viewing by channel group by hour, Adults 16-17 - 2011



3.4 Spot advertising

The following analysis examines trends in the volume of alcohol advertising shown across commercial television channels and is based on the measure of television 'advertising spots'. 'Advertising spots' are a measure of the number of commercials aired on television and this data can help provide some context with regards to how the volume of advertising has changed and the impact this has on the amount of advertising viewed.

As Figure 33 shows, alcohol commercials accounted for 2.0% of all commercial spots shown across all channels in 2011. This share has ranged from 1.6% in 2007 to 2.3% in 2010.

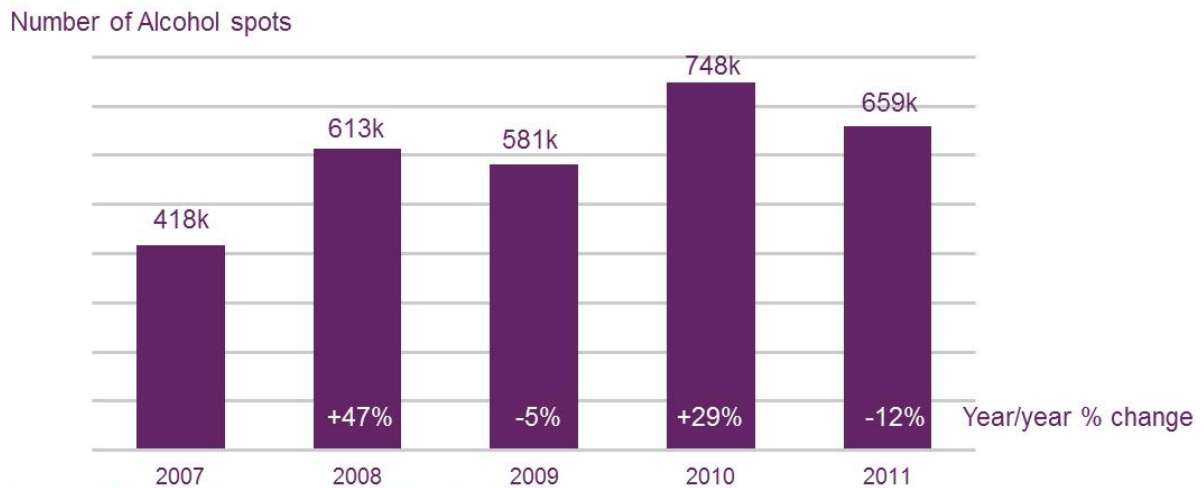
Figure 33: Alcohol spot advertising in the context of all television advertising



Source: BARB./Nielsen Monitor - Analysis excludes HD variants

The number of alcohol commercials shown has fluctuated across the past five years, ranging from 418,000 commercials a year in 2007 to 748,000 in 2010. Between 2010 and 2011 the amount of alcohol advertising shown fell by 12% from 748,000 to 659,000 (Figure 34).

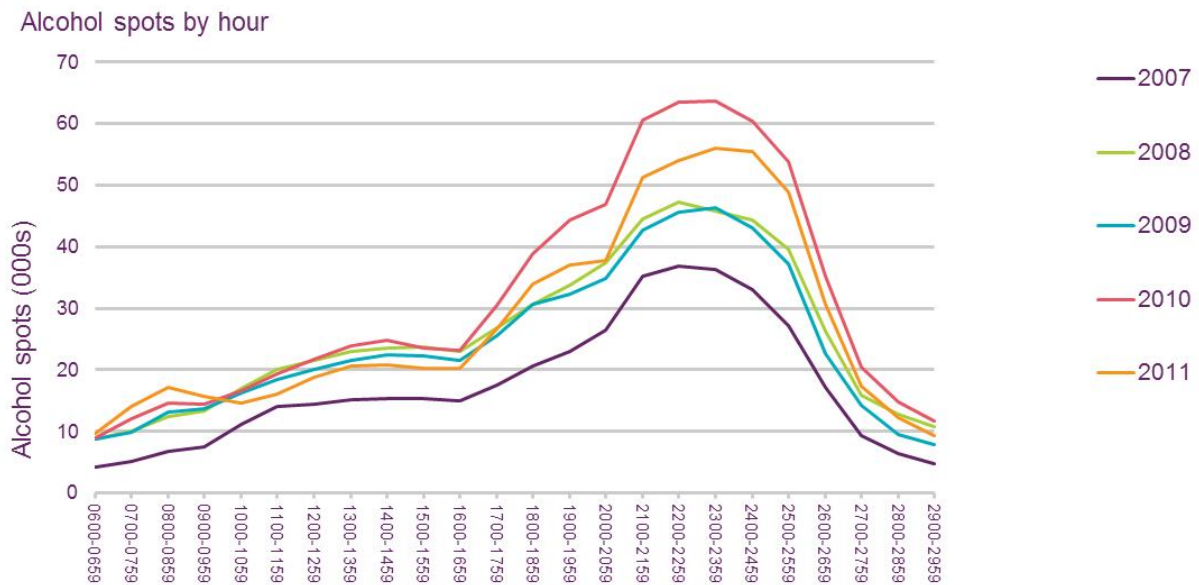
Figure 34: Alcohol advertising spots by year



Source: BARB./Nielsen Monitor - Analysis excludes HD variants

Figure 35 shows the number of alcohol spots shown by hour across the whole year. The distribution of alcohol spots shown increases gradually over the course of the day, peaking during the post-21:00 period (Figure 35).

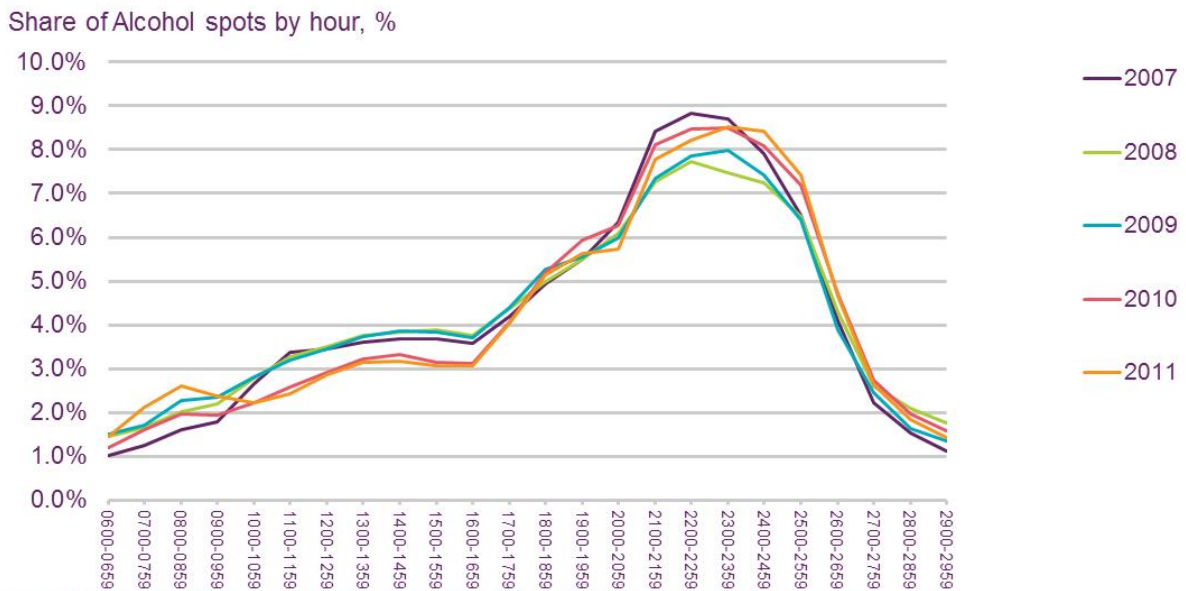
Figure 35: Total number of alcohol commercials by hour



Source: BARB./Nielsen Monitor - Analysis excludes HD variants

Analysis of the distribution of alcohol spots by hour as a proportion of all alcohol spots shows a similar, gradual increase in spots across the day (Figure 36). The share of alcohol advertising spots shown peaks post-21:00 and in 2011 the highest proportion of spots per hour were shown during the 23:00-23:59 time slot (8.5% of all alcohol spots in 2011).

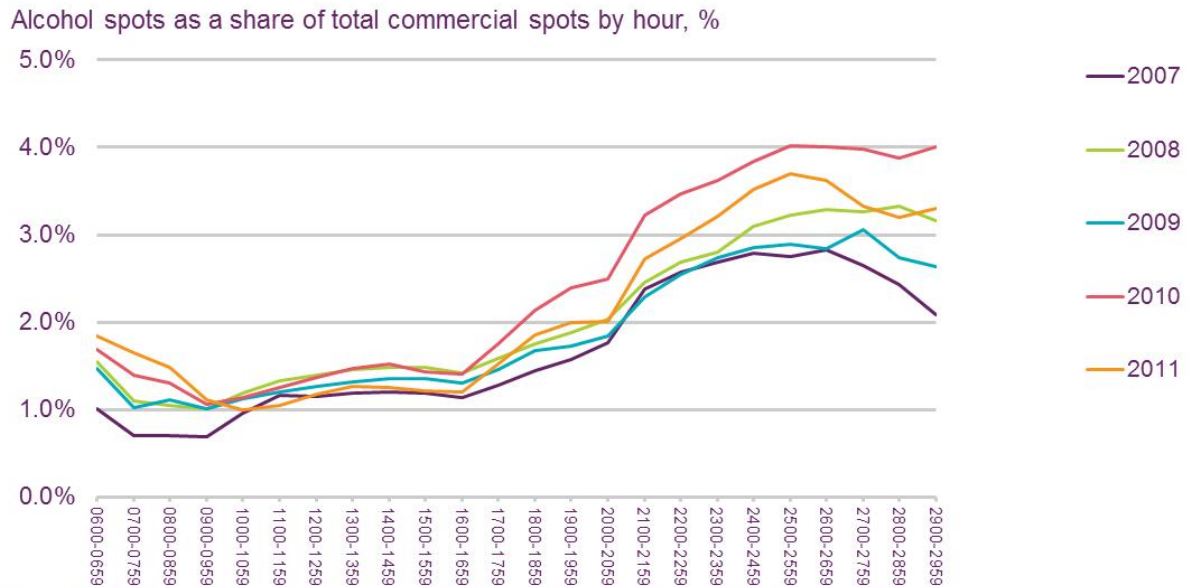
Figure 36: Alcohol spot advertising by hour as a share of all alcohol advertising



Source: BARB./Nielsen Monitor - As a percentage of total Alcohol spots - Analysis excludes HD variants

Figure 37 looks at the amount of alcohol advertising shown as a proportion of **all commercial advertising** shown by hour (across each annual period). As Figure 33 shows, across the entire day alcohol advertising accounted for 2.0% of all commercial advertising shown in 2011. Figure 37 shows that this proportion varies across the day and increases noticeably post: 21:00 when alcohol spots accounted for over 3% of all commercial spots in 2011.

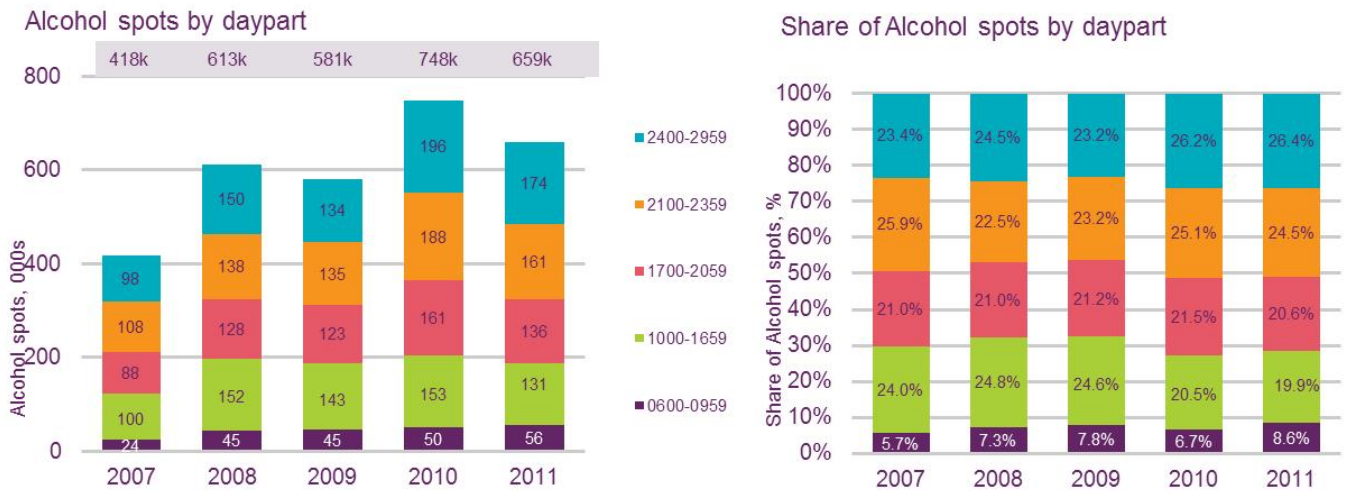
Figure 37: Alcohol spot advertising by hour as a share of all commercial advertising



Source: BARB./Nielsen Monitor - As a percentage of total commercial spots per hour - Analysis excludes HD variants

Data presented in Figure 38 groups together hourly spot data by daypart. In 2011, 49.1% of all alcohol spots were broadcast between 06:00-20:59 – and this proportion has remained fairly stable over time. A further 24.5% of spots were shown between 21:00-23:59 and 26.4% post-midnight. The share of alcohol spots aired post-midnight has increased over the analysis period from 23.4% in 2007 to 26.4% in 2011.

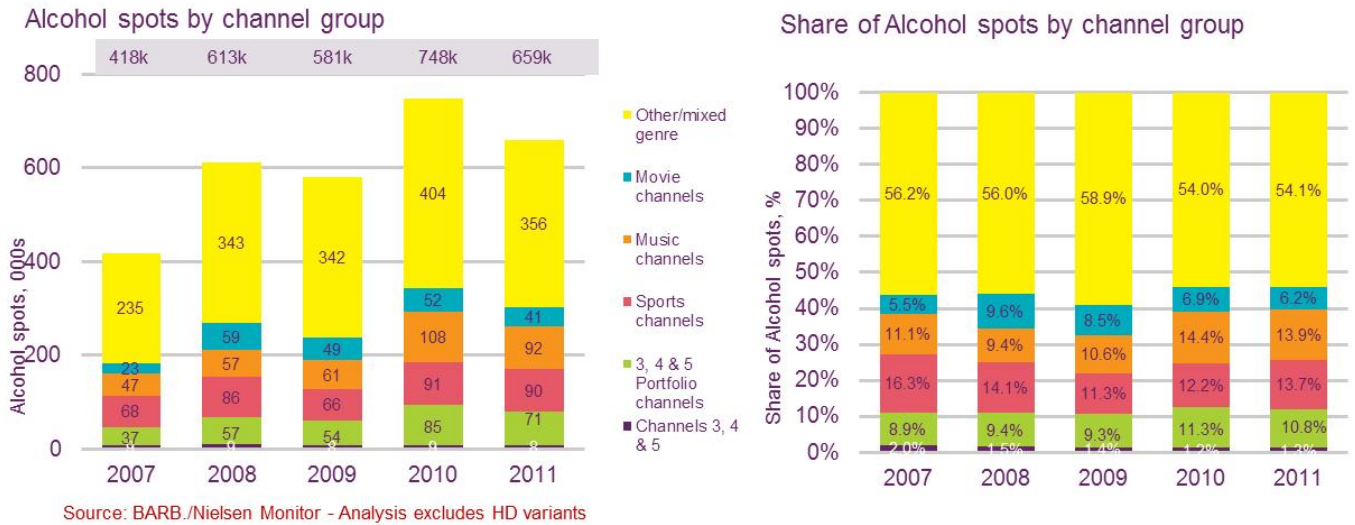
Figure 38: Alcohol spot advertising by daypart



Source: BARB./Nielsen Monitor - Analysis excludes HD variants

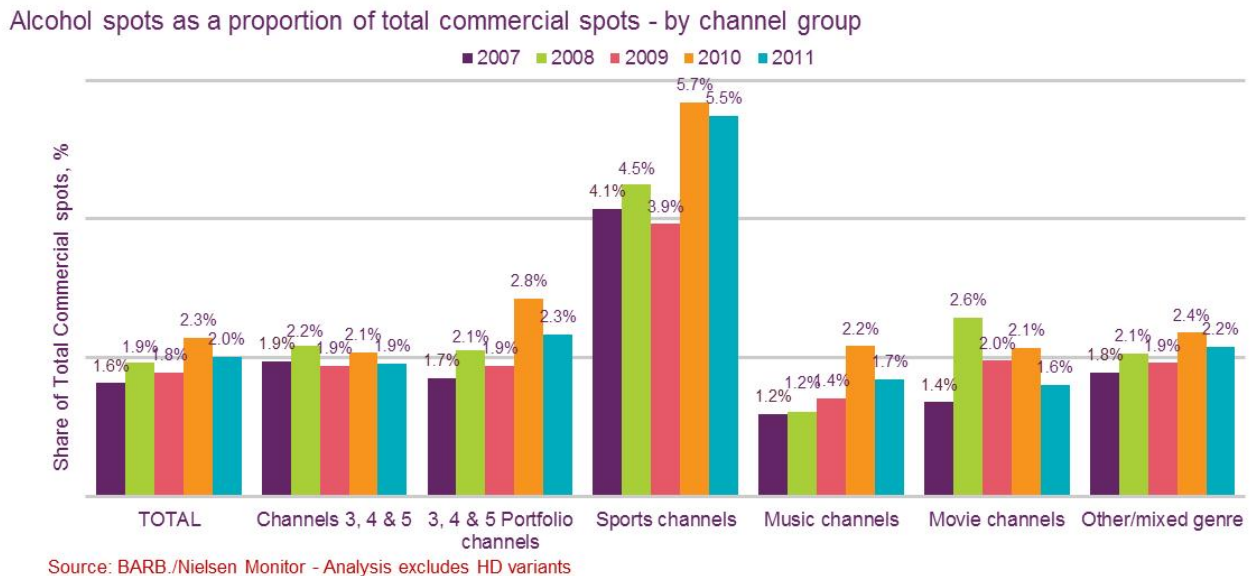
Analysis of the distribution of alcohol advertising by channel group shows that channels 3, 4 and 5 accounted for 1.3% of all alcohol spots shown in 2011. The portfolio channels, sports and music channel groups each accounted for over 10% of all alcohol spots broadcast in 2011 – with other/mixed genre channels accounting for 54.1% of all alcohol spots (Figure 39). The most notable change has been the increase in the proportion of alcohol spots shown across the music channels from a low of 9.4% in 2008 to 13.9% in 2011.

Figure 39: Alcohol spot advertising by channel group



Alcohol commercials accounted for 2.0% of all commercials shown in 2011 (Figure 33) - however this proportion varies when looking at alcohol spots as a proportion of all commercials shown in each channel group (Figure 40). While the proportion of alcohol spots shown in 2011 is marginally lower across music and movie channels, it increases to 2.3% across the portfolio channels and to over 5.0% across sports channels. In 2011, alcohol advertising represented 5.5% of all commercial advertising shown on sports channels.

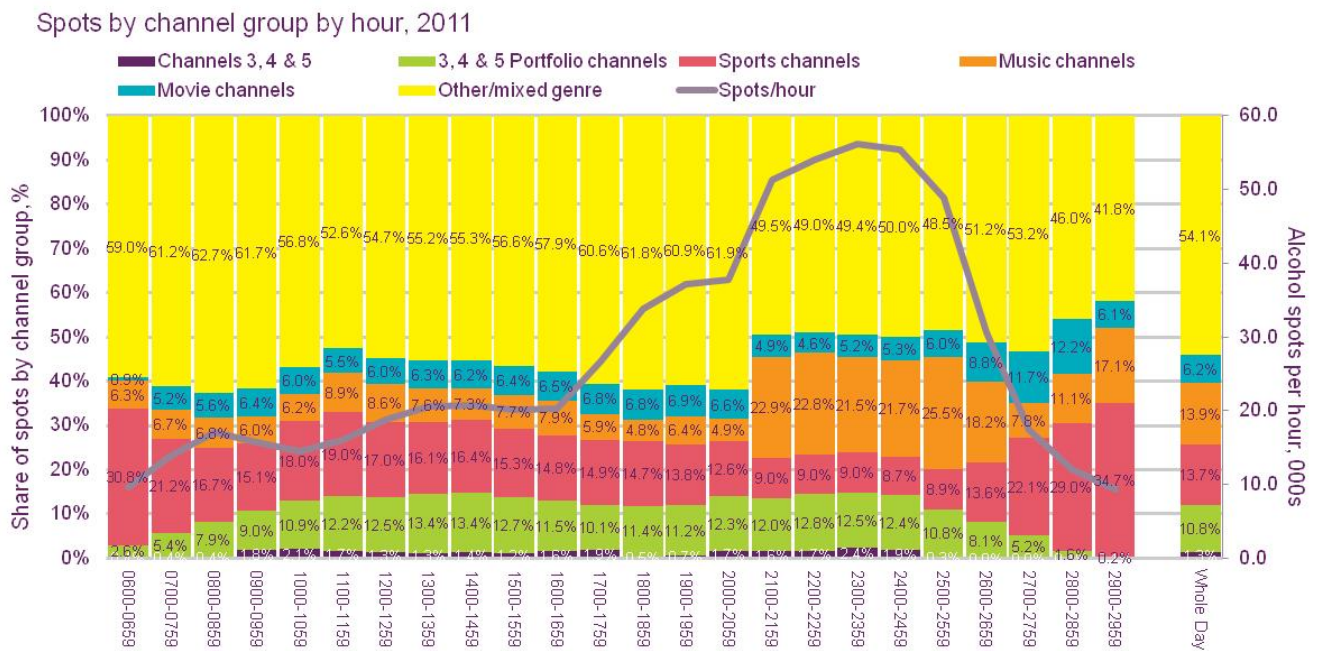
Figure 40: Alcohol spot advertising as a share of total commercial channels' spots by channel group



As with the analysis of viewing trends, in Figure 41 we examine the distribution of alcohol spot advertising by channel group by hour in 2011. Figure 41 shows how the distribution of alcohol spots during 'adult' commercial airtime is broken down by channel group during each hour of the day. The 'whole day' bar sets out how spot distribution is split across the entire day, providing an 'average' against which to compare the hourly data.

The data shows that during the early evening peak in alcohol advertising, above-average proportions of alcohol spots were shown on the portfolio and other/mixed genre channel groups, compared with the 'whole day' figures. The share of spots shown on channels 3, 4 and 5 were also marginally higher between 20:00-22:59 at around 1.7% compared with the average of 1.3%. Sports channels aired above-average proportions of alcohol advertising earlier in the day, during the afternoons, when viewing tends to be higher given the scheduling of sporting events. Post-21:00, when there is a peak in spot advertising, portfolio channels continued to show above-average proportions of alcohol advertising and there was a sharp increase in the proportion of spots accounted for by the music channels compared with the 'whole day' average (13.9%).

Figure 41: Alcohol spot advertising by channel group by hour, 2011



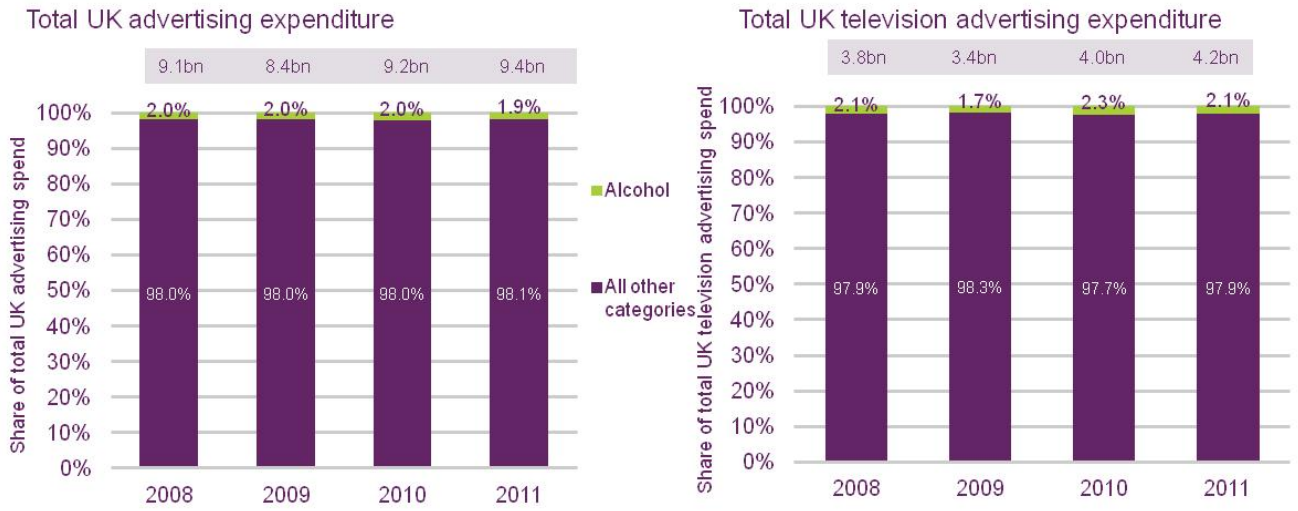
Source: BARB /Nielsen Monitor - Analysis excludes HD variants

3.5 Advertising expenditure

Another measure which can help provide some context with regards to trends in the distribution of alcohol advertising is advertising expenditure. It is important to note, however, that while advertising expenditure is a useful way in which to understand trends in activity across media, some trends may result from changing advertising costs rather than a change in the volume of advertising. Advertising expenditure data has been sourced from the Nielsen Media Ad Dynamix database which provides estimates on advertising spend based on industry data.

Figure 42 looks at the share of total UK advertising expenditure across all media and total UK television advertising expenditure accounted for by alcohol advertising spend. The data shows that in 2011, alcohol advertising **spend** represented 1.9% of all advertising spend and 2.1% all television advertising spend. As shown previously (Figure 33), alcohol advertising accounted for 2.0% of all commercial advertising **spots** shown on television.

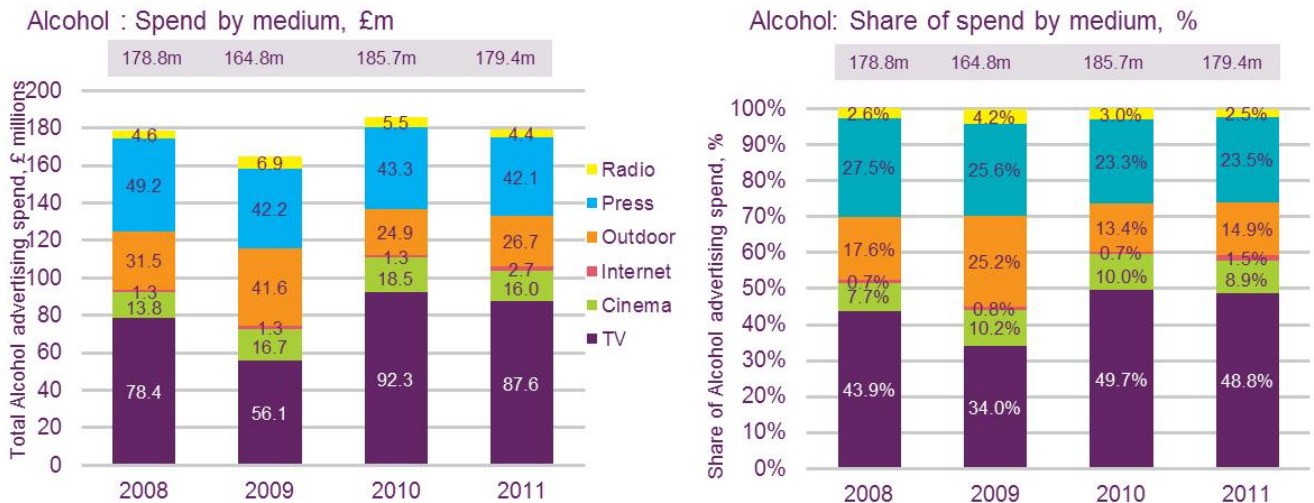
Figure 42: Alcohol advertising expenditure as a share of all advertising spend and television advertising spend



Source: BARB./Nielsen Ad Dynamix

Analysis of advertising spend by medium shows that, following a dip in advertising spend in 2009, alcohol advertising increased on television and across the internet (Figure 43). Television advertising accounted for almost half of all spend in 2011 (48.8%). The dip in alcohol advertising expenditure on television in 2009 (from £78.4m in 2008 to £56.1m in 2009), mirrors the drop in total TV advertising spend across all categories (from £3.8bn in 2008 to £3.4bn in 2009 - Figure 42).

Figure 43: Alcohol advertising expenditure by medium

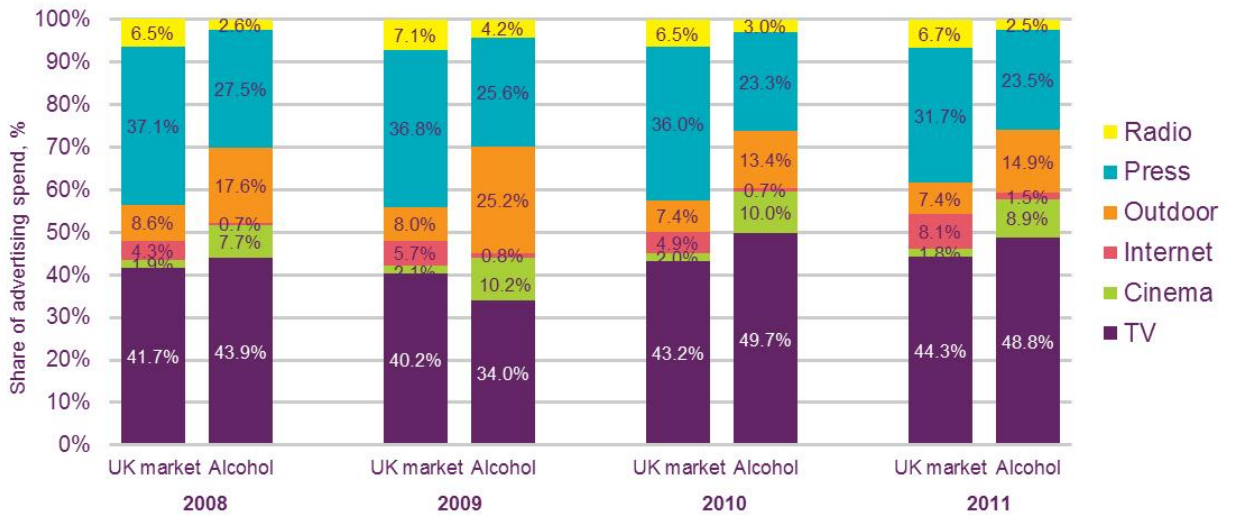


Source: BARB./Nielsen Ad Dynamix

Comparing the breakdown in alcohol advertising spend by medium with the split in spend across all product categories shows that alcohol advertisers apportion a greater share of spend to television, cinema and outdoor advertising (Figure 44).

Figure 44: Comparison of all advertising expenditure and alcohol advertising expenditure by medium

Share of spend by medium – Total UK advertising market vs. Alcohol category



Source: BARB./Nielsen Ad Dynamix

Channels 3, 4 and 5 account for the greatest proportion of alcohol advertising expenditure on television, although this share has declined steadily from 55.9% in 2008 to 45.4% in 2011 (Figure 45). As this share has declined, the proportion of advertising spend represented by the portfolio channels has increased from 14.5% in 2008 to 21.3% in 2011. The share of spend accounted for by sports channels increased from 9.4% in 2010 to 12.2% in 2011.

While channels 3, 4 and 5 accounted for 45.4% of all alcohol advertising spend in 2011, only 1.3% of alcohol spots were broadcast across these channels (Figure 39). This difference is likely to be a result of the difference in advertising costs on channels 3, 4 and 5 compared with other channels.

Figure 45: Alcohol advertising expenditure by channel group

Share of Alcohol television advertising expenditure by channel group, %



Source: BARB./Nielsen Ad Dynamix

Section 4

Changes in the amount of alcohol advertising seen by children and young people

4.1 Introduction

This section examines trends in exposure to alcohol television advertising between 2007 and 2011. Data is presented for five demographic groups; children aged 4-15, 4-9 year olds, 10-15 year olds, 16-24 year olds and 16-17 year olds. As data for 16-17 year olds has been obtained from a different source, this analysis has been reported separately.

4.2 Key findings

- a) In 2011, alcohol advertising accounted for 1.4% (1.4bn impacts) of all television advertising seen by children aged 4-15 and 2.2% (2.2bn impacts) of all advertising seen by 16-24 year olds– this figure varies across the day, rising to over 3% of commercial advertising seen post-21:00.
- b) The proportion of all television advertising impacts represented by alcohol advertising fluctuated between 1.3%-1.7% over the analysis period among children and 1.9%-2.6% among 16-24 year olds.
- c) In 2007, 1.3bn impacts were seen by children aged 4-15, a share of 1.4% of all commercial advertising seen – these figures increased to 1.7bn impacts in 2010 (1.7% of all television advertising seen) followed by a small decline in 2011 to 1.4bn impacts (1.4% of all television advertising seen). In comparison, 1.7bn alcohol impacts were seen by 16-24 year olds in 2007 (2.1% of all television advertising seen) – this increased to 2.6bn impacts in 2010 and then fell slightly to 2.2bn impacts in 2011.
- d) Figures suggest that in 2011 a child aged 4-15 watched, on average, 227 commercials each week and 3.2 of these were for alcohol products. In comparison, they watched 201 commercials a week in 2007 – 2.7 of which were for alcohol.
- e) Similar to trends in alcohol spot distribution by hour, children's alcohol impacts increase gradually over the course of the day, peaking between 21:00-21:59, with 17.5% of all alcohol impacts seen during this slot in 2011.
- f) Alcohol impacts peaked during the 22:00-22:59 slot in 2011 among young adults, accounting for 16.2% of all 16-24 alcohol impacts and 15.9% of 16-17 alcohol impacts.
- g) While 49.1% of all alcohol spots in 2011 were aired pre-21:00, 56.4% of alcohol impacts among 4-15 year olds were seen before 21:00 – a further 37.7% were seen between 21:00-23:59. Driven by differences in viewing habits, over 50% of alcohol advertising seen by 16-24 and 16-17 year olds was seen post-21:00.
- h) With increased viewing among children to portfolio channels, these channels also account for an increasing proportion of alcohol impacts. In 2011, portfolio channels

represented 20.2% of viewing to commercial channels compared with 26.7% of alcohol impacts – while sports channels accounted for less than 5% of viewing and 10.3% of impacts.

- i) Similarly, among young adults the share of alcohol impacts seen across channels 3, 4 and 5 has declined steadily since 2007 – at the same time the share represented by portfolio and 'other' channels has increased. Among both 16-24 and 16-17 year olds, portfolio channels accounted for a greater proportion of alcohol impacts than channels 3, 4 and 5 in 2011.
- j) In 2011, channels 3, 4 and 5 accounted for above average proportions of alcohol impacts during peak hours – post-21:00 there was an increase in the share of impacts seen across the portfolio and music channels.

4.3 Trends in exposure to alcohol advertising

In 2011, alcohol advertising accounted for 1.4% of all television advertising seen by children aged 4-15 – equivalent to 1.4bn impacts (Figure 46). This proportion ranged between 1.3%-1.7% over the analysis period. Among younger children (aged 4-9), alcohol advertising accounted for 1.0% of advertising seen in 2011 – and among 10-15 year olds this share stood at 1.8% (Annex 1, Figure 81 and 82).

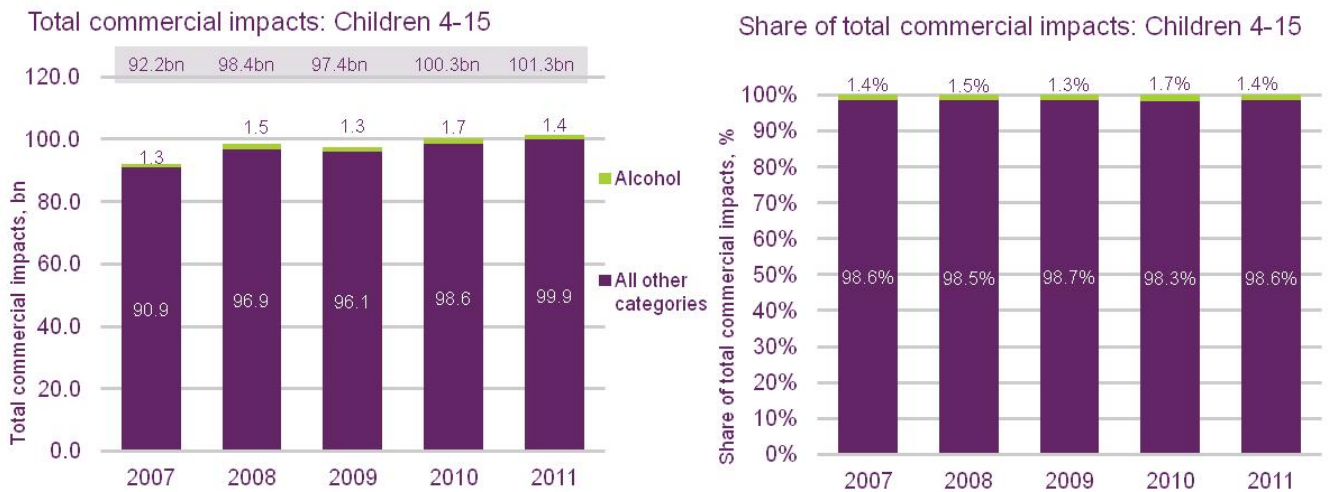
Among 16-24 year old adults, alcohol advertising represented 2.2% of all television advertising seen in 2011 – down marginally from 2.6% in 2010 (Figure 47). Analysis of similar data for all adults aged 16 or over and those aged 25 or over shows that alcohol advertising accounts for a similar proportion – 2.2% across both groups in 2011 (Annex 1, Figure 83 and 84).

In 2007, a total of 1.3bn impacts were seen by children aged 4-15, a share of 1.4% of all commercial advertising seen – these figures increased to 1.7bn impacts in 2010 (1.7% of all television advertising seen) followed by a small decline in 2011 to 1.4bn impacts (1.4% of all television advertising seen). In comparison, 1.7bn alcohol impacts were seen by 16-24 year olds in 2007 (2.1% of all television advertising seen) – this increased to 2.6bn impacts in 2010 and then fell slightly to 2.2bn impacts in 2011.

These figures would suggest that in 2011 a child aged 4-15 watched, on average, 227 commercials each week and 3.2 of these were for alcohol products. In comparison, they watched 201 commercials a week in 2007 – 2.7 of which were for alcohol.

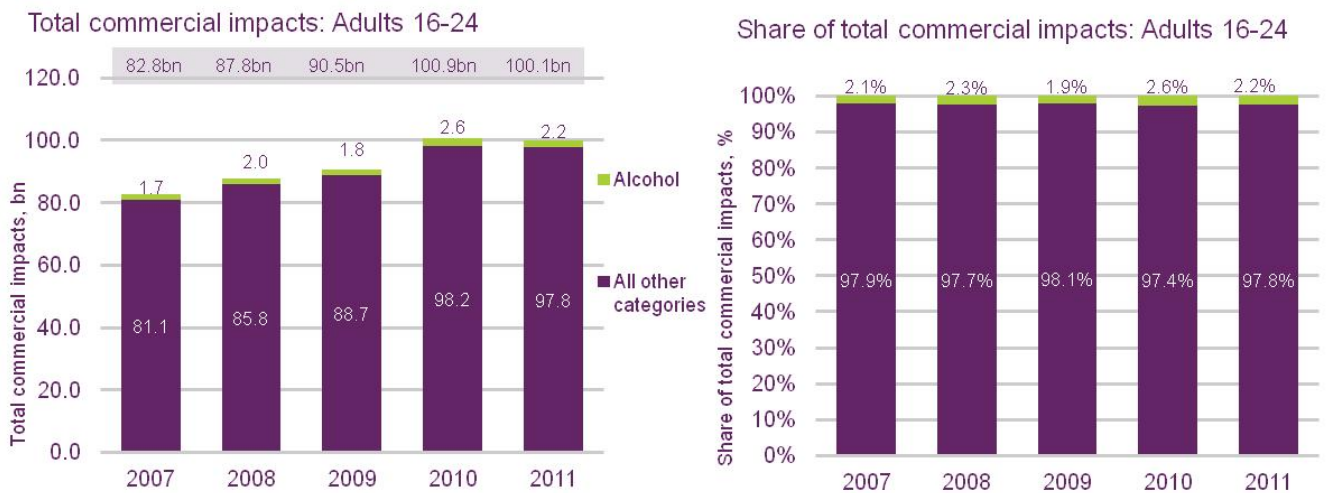
Adults watched, on average, 375 commercials each week in 2011, 8.1 of which were for alcoholic products - this is compared with 6.6 of the 323 commercials seen per week in 2007.

Figure 46: Alcohol impacts as a share of total commercial impacts, Children 4-15



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

Figure 47: Alcohol impacts as a share of total commercial impacts, Adults 16-24

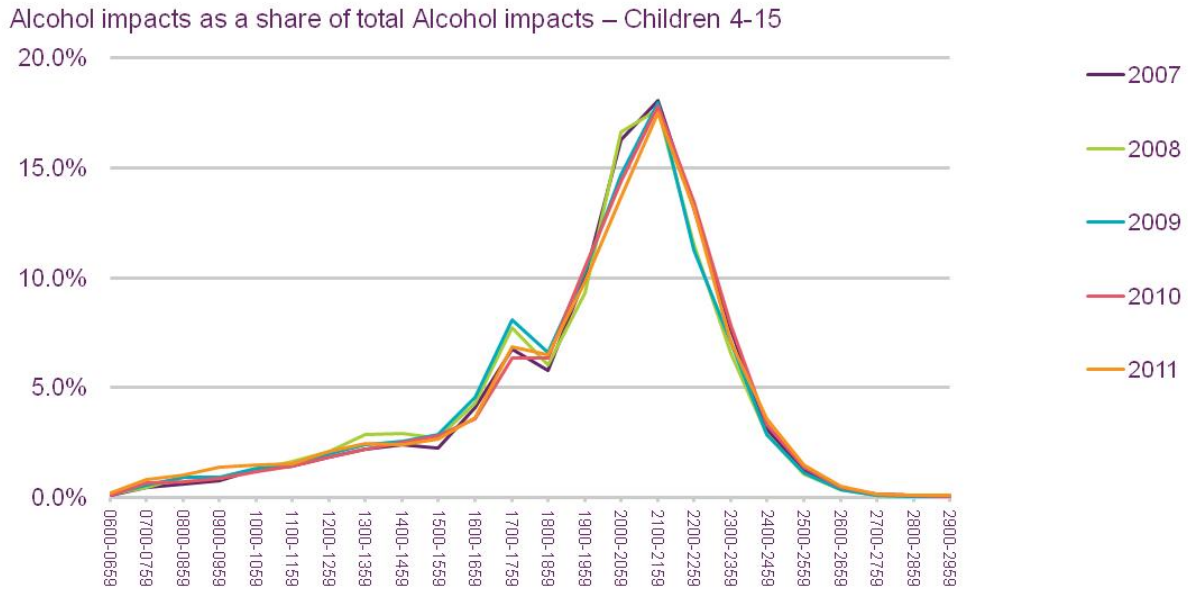


Source: BARB /Nielsen Monitor
 -New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Exposure to alcohol advertising across the day

Analysis of the distribution of impacts across the day (Figure 48) shows that this distribution follows a similar trend to that of advertising spots (Figure 35).

Figure 48: Alcohol impacts by hour as a share of total alcohol impacts, Children 4-15



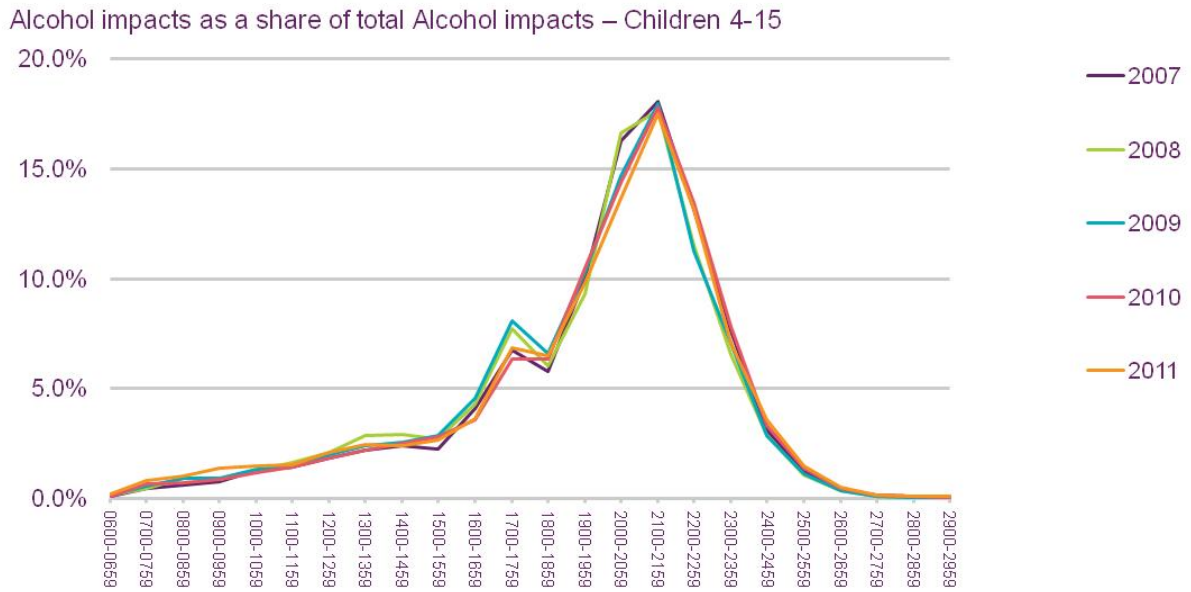
Source: BARB./Nielsen Monitor - As a percentage of total Alcohol impacts
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 49 shows, children's exposure to alcohol advertising increases gradually over the course of the day, peaking between 21:00-21:59. In 2011, this timeslot accounted for 17.5% of all alcohol impacts (Figure 48).

In 2011, alcohol impacts accounted for 1.4% of all advertising seen by children (Figure 46). This figure varies across the day rising to over 3% of commercial advertising seen post-21:00 (Figure 50) in 2011 – and follows a similar pattern to that of spot distribution presented in Figure 37.

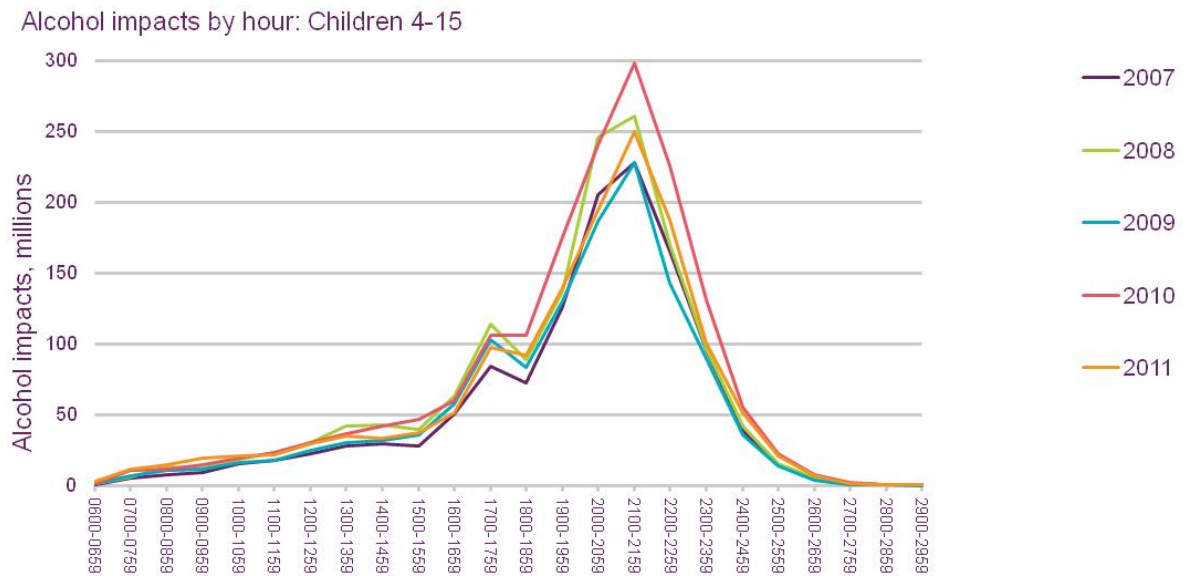
Similar trends are noted among children aged 4-9 and 10-15 – corresponding charts can be found in Annex 1 (Figure 85-90)

Figure 48: Alcohol impacts by hour as a share of total alcohol impacts, Children 4-15



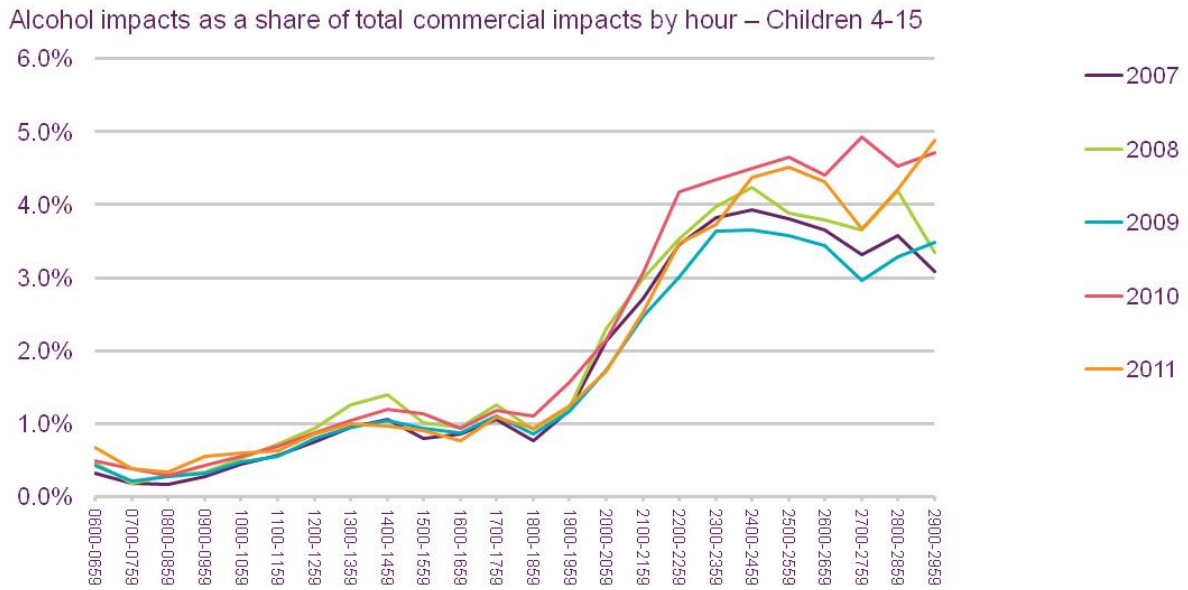
Source: BARB./Nielsen Monitor - As a percentage of total Alcohol impacts
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 49: Alcohol impacts by hour, Children 4-15



Source: BARB./Nielsen Monitor - Figures show total number of impacts per hour across the whole year
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

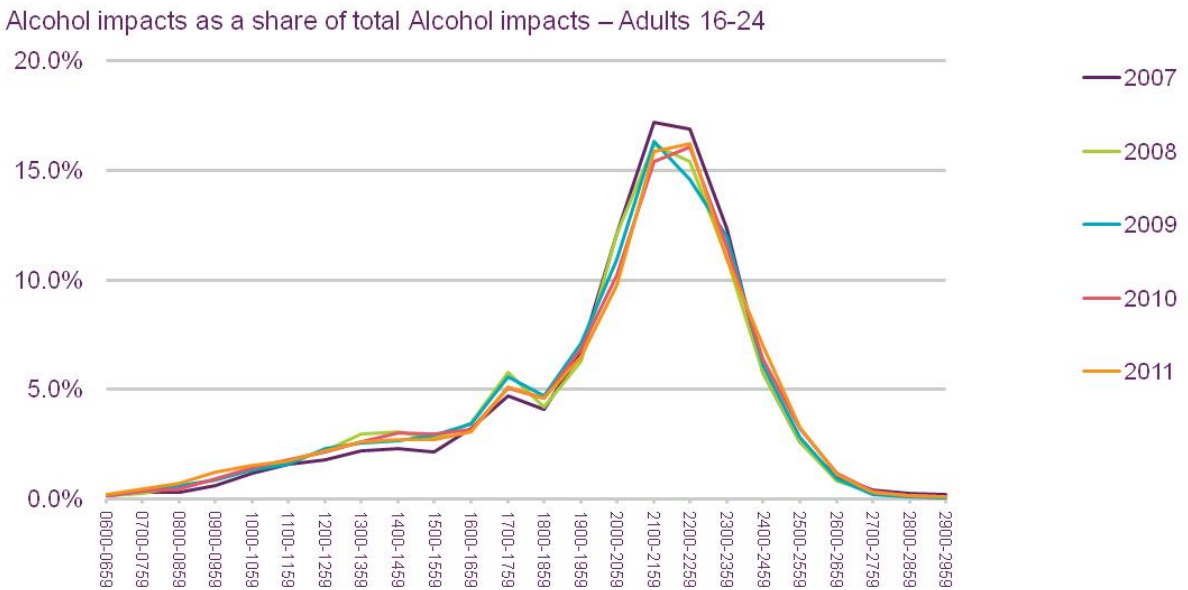
Figure 50: Alcohol impacts as a share of total commercial impacts by hour, Children 4-15



Source: BARB./Nielsen Monitor - As a percentage of total commercial impacts per hour
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

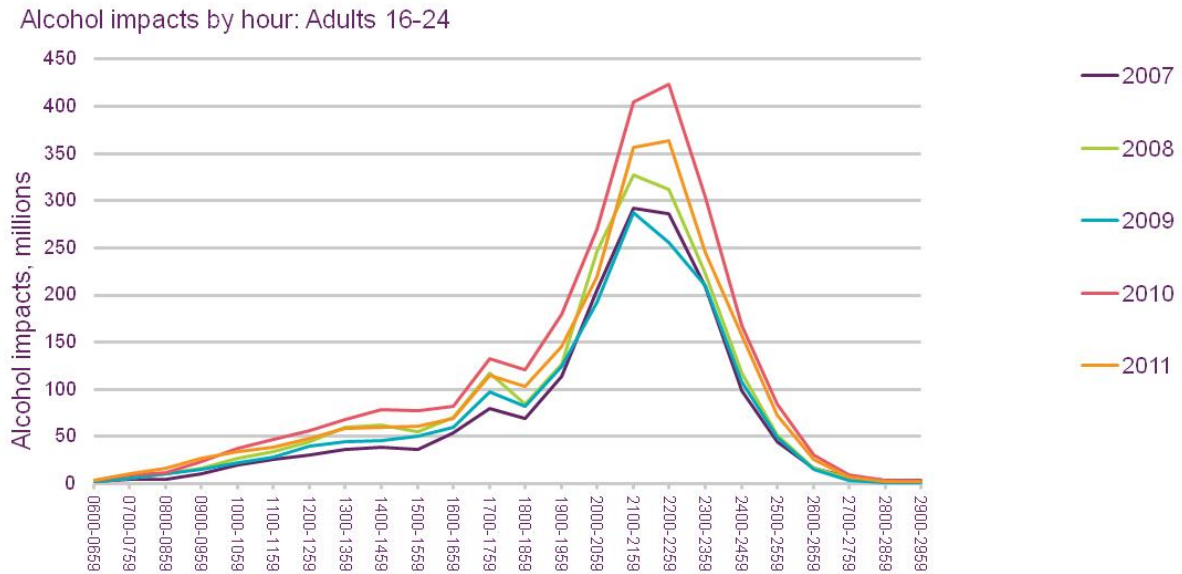
Exposure to alcohol advertising peaks post 21:00 among 16-24 year olds. In 2011, impacts peaked during the 22:00-22:59 slot, accounting for 16.2% of all alcohol advertising seen (Figure 51). Prior to the evening peak, there is a smaller peak in impacts between 17:00-17:59 – in 2011 this slot represented of 5.1% of alcohol impacts. As with trends noted among children, the proportion of total advertising seen by 16-24 year olds that is represented by alcohol advertising, increases from the average of 2.2% (Figure 47) to over 3% later in the evening (Figure 53).

Figure 51: Alcohol impacts by hour as a share of total alcohol impacts, Adults 16-24



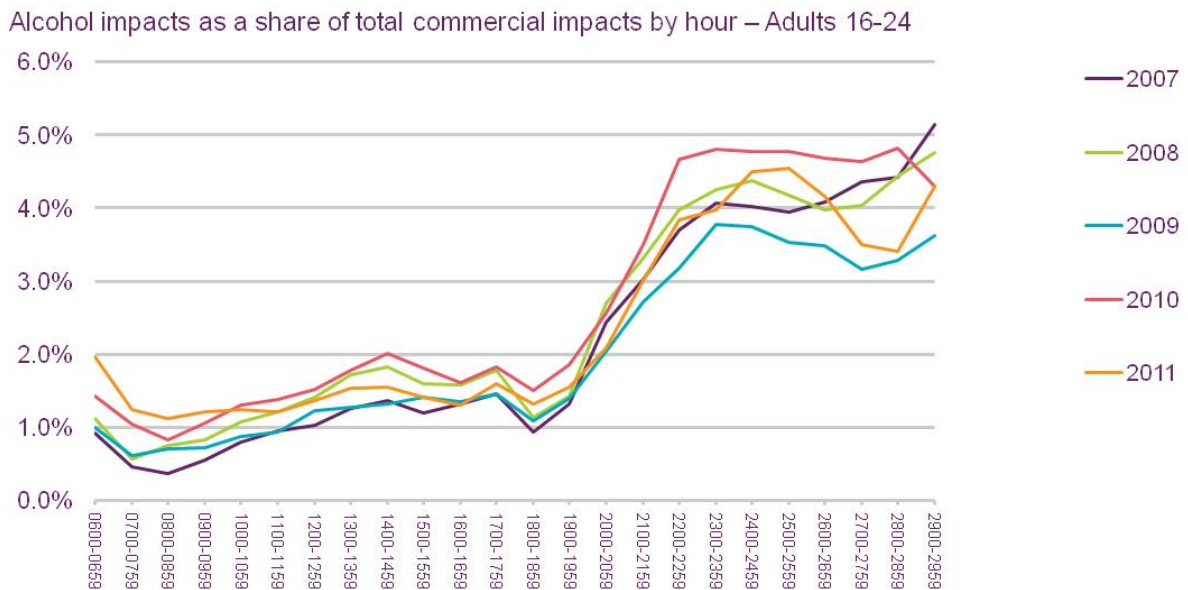
Source: BARB./Nielsen Monitor - As a percentage of total Alcohol impacts
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 52: Alcohol impacts by hour, Adults 16-24



Source: BARB /Nielsen Monitor - Figures show total number of impacts per hour across the whole year
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

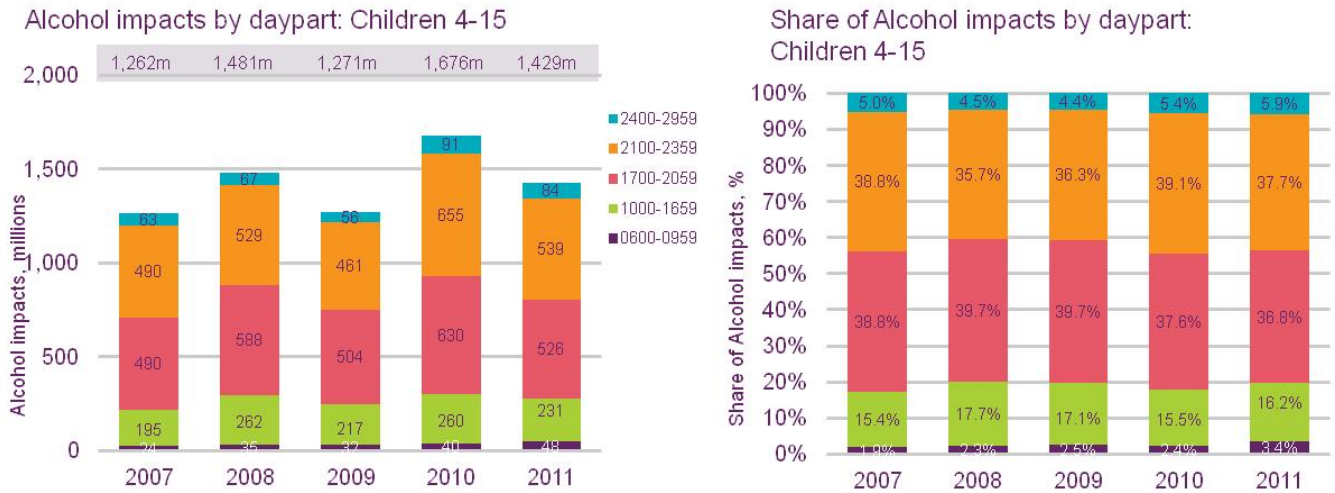
Figure 53: Alcohol impacts as a share of total commercial impacts by hour, Adults 16-24



Source: BARB /Nielsen Monitor - As a percentage of total commercial impacts per hour
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

The following figures group together hourly impacts data to look at trends by daypart. As Figure 38 previously showed, 49.1% of all alcohol spots were aired before 21:00 – in comparison 56.4% of all the alcohol advertising seen by children aged 4-15 in 2011 was seen before 21:00 (Figure 54). A further 37.7% of alcohol impacts were seen between 21:00-23:59 in 2011.

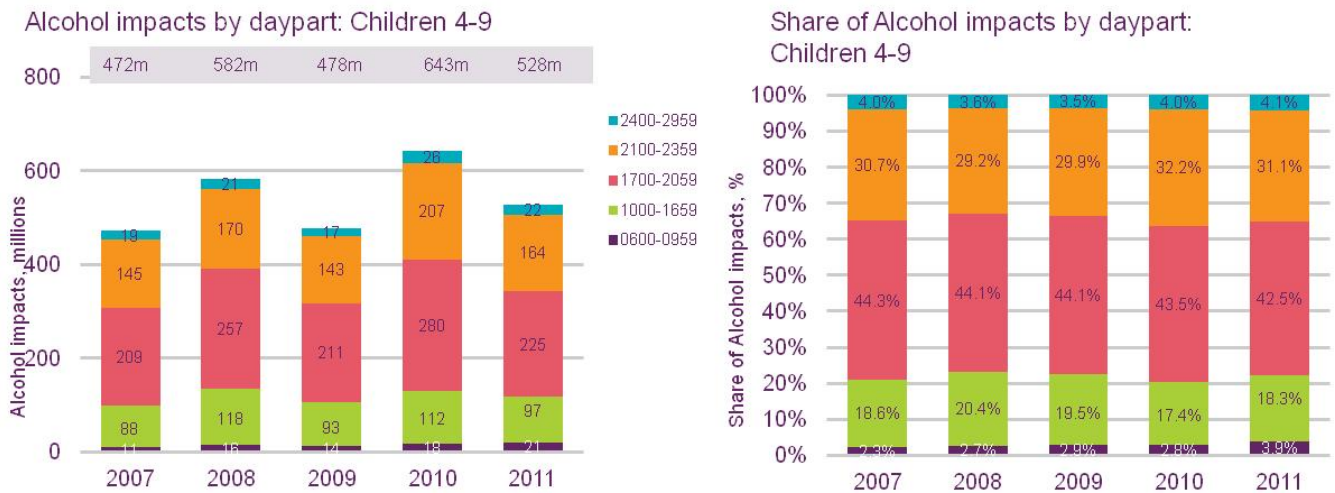
Figure 54: Alcohol impacts by daypart, Children 4-15



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

Given the differences in viewing habits by age, a larger proportion of alcohol impacts were seen pre- 21:00 among younger children (aged 4-9), with 64.8% of alcohol impacts seen during this period in 2011 (Figure 55).

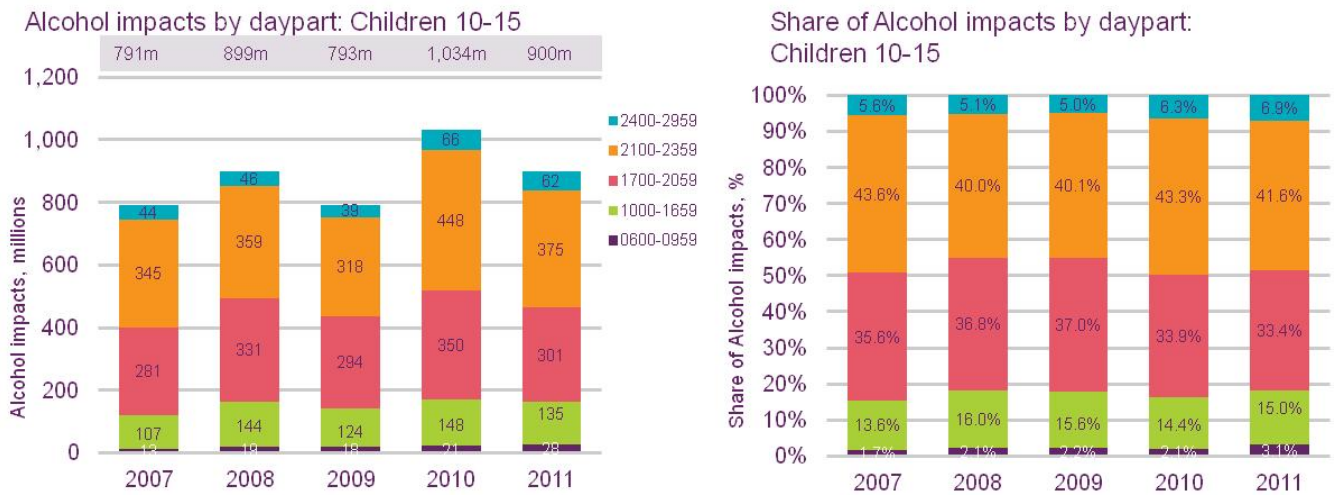
Figure 55: Alcohol impacts by daypart, Children 4-9



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

Among 10-15 year olds, the proportion of alcohol impacts seen pre-21:00 is significantly lower than for 4-9 year olds with 51.5% of alcohol advertising in 2011 seen during that period (Figure 56). Over 40% of alcohol impacts were seen between 21:00-23:59 in 2011.

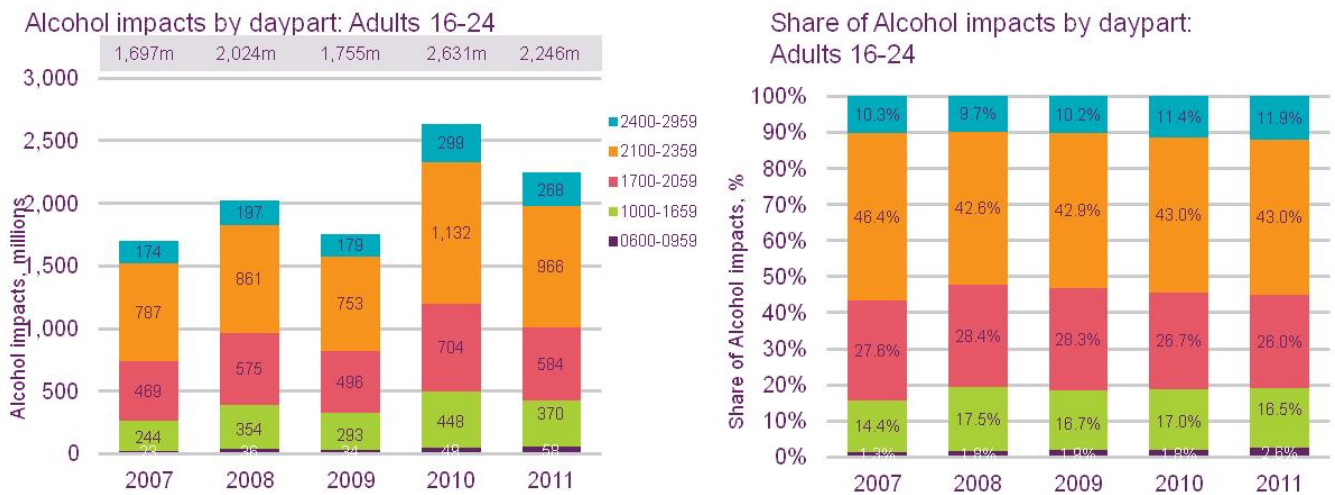
Figure 56: Alcohol impacts by daypart, Children 10-15



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

With notable differences in viewing habits across the day between children and young adults, the proportion of alcohol impacts seen pre and post-21:00 also differ between the two groups. Among 16-24 year olds, 45.1% of all alcohol advertising in 2011 was seen before 21:00 (compared with 56.4% of child impacts) – with over 50% of impacts seen post- 21:00 (compared with 43.6% of child impacts).

Figure 57: Alcohol impacts by daypart, Adults 16-24



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

Exposure to alcohol advertising by channel group

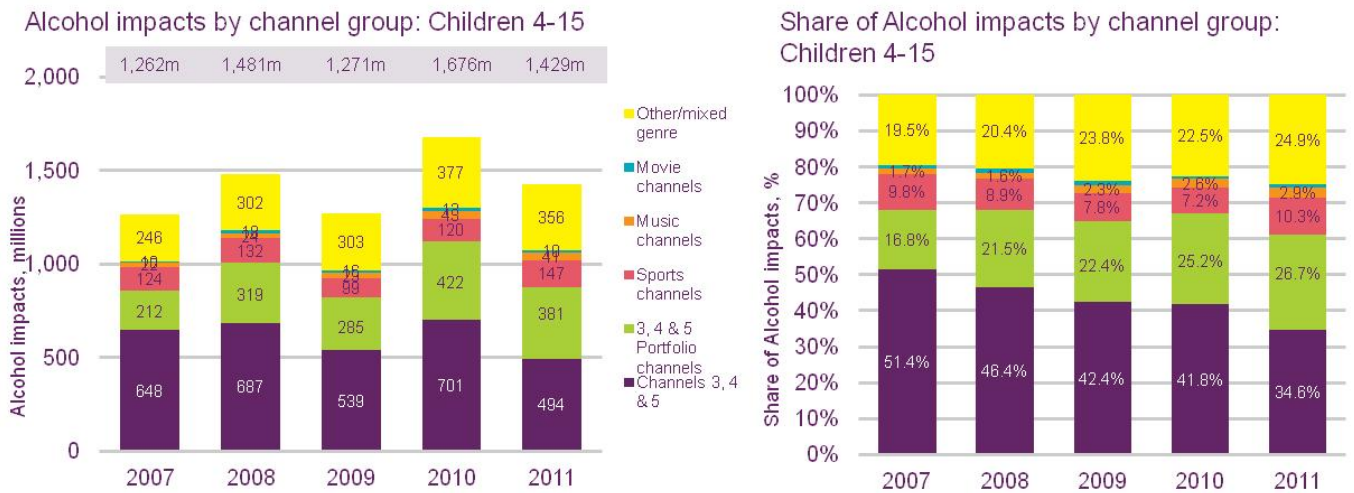
As illustrated by the analysis of viewing trends by channel group, with increased viewing to the portfolio channels, these channels also account for an increasing proportion of alcohol impacts (Figure 58). In 2011, portfolio channels represented 20.2% of viewing to 'adult' commercial channels (Figure 24) compared with 26.7% of alcohol impacts. Similarly, sports channels accounted for less than 5% of viewing and 10.3% of alcohol impacts in 2011. In

total channels 3, 4 and 5 combined with their portfolio channels accounted for 61.0% of alcohol impacts in 2011 – down from 68.6% in 2007.

In comparison, the share of children's 'adult' commercial viewing and alcohol impacts seen across channels 3, 4 and 5 were a similar level in 2011 – 37.4% (Figure 24) and 34.6% (Figure 58) respectively.

Corresponding channel group analysis for children aged 4-9 and 10-15 years can be found in Annex 1 (Figure 91 and 92).

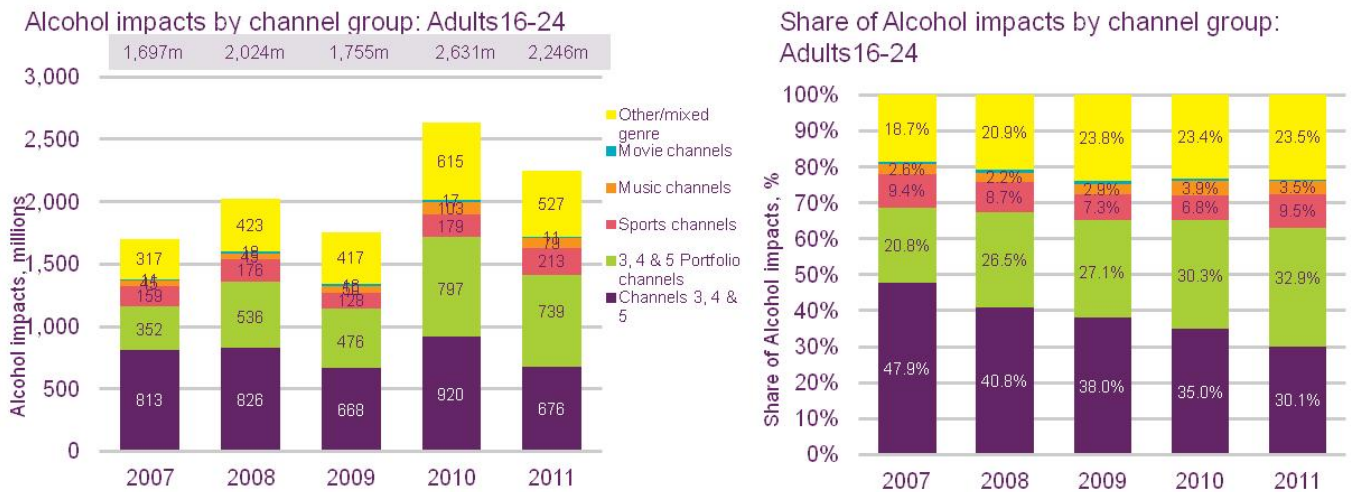
Figure 58: Alcohol impacts by channel group, Children 4-15



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

Analysis of alcohol impacts for 16-24 year olds by channel group shows similar trends (Figure 59). The share of alcohol impacts seen across channels 3, 4 and 5 has declined steadily since 2007 with the share represented by portfolio and 'other' channels increasing. In 2011, the share of alcohol impacts seen across the portfolio channels (32.9%) was higher than the amount of alcohol advertising seen on channels 3, 4 and 5 (30.1%). Both the portfolio channels and sports channels accounted for a greater proportion of impacts compared with viewing (Figure 25).

Figure 59: Alcohol impacts by channel group, Adults 16-24

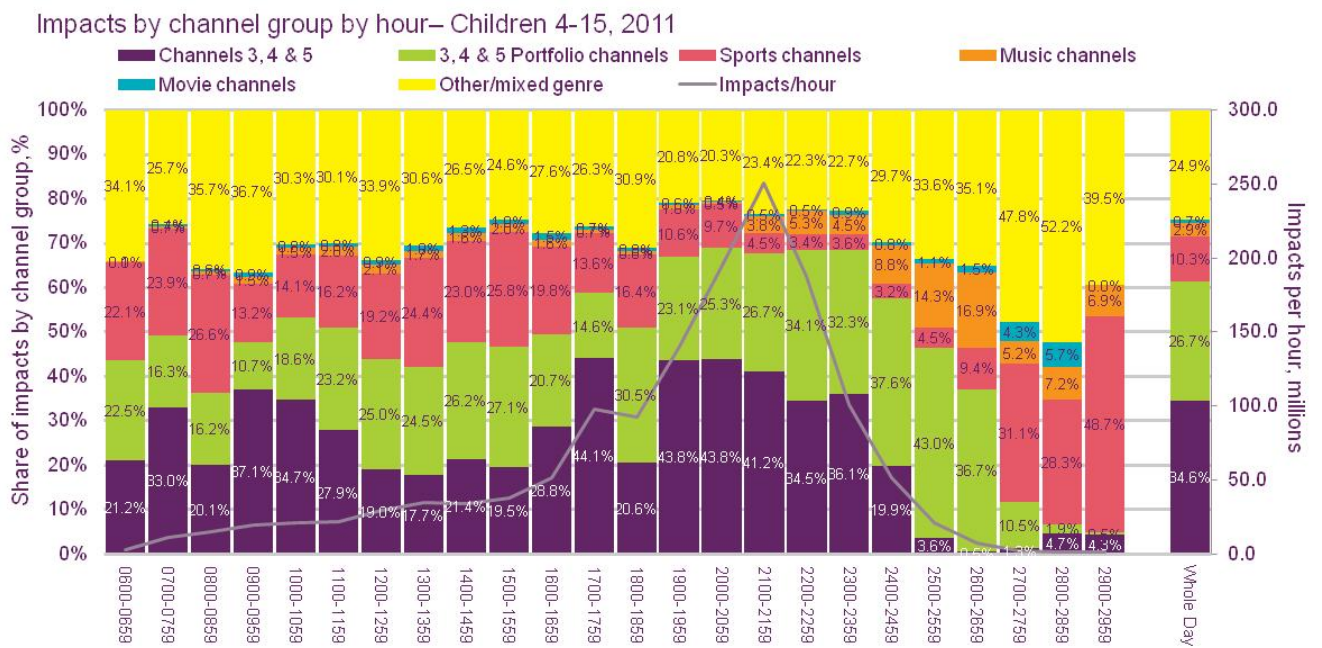


Source: BARB./Nielsen Monitor
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Exposure to alcohol advertising by channel group by hour

Figure 60 looks at the distribution of alcohol impacts by channel group by hour across 2011 and compares this with the average split in alcohol impacts across the 'whole day'. When compared against impact distribution across the entire day, channels 3, 4 and 5 account for above-average shares of alcohol impacts during the evening peaktime slot. Post-21:00 there is an increase in the share of impacts seen across the portfolio and music channel groups. Sports channels and 'other' channels account for relatively higher proportions of impacts earlier in the day or later at night when the overall level of alcohol advertising seen is lower.

Figure 60: Alcohol impacts by channel group by hour- Children 4-15, 2011



Source: BARB./Nielsen Monitor

By looking more closely at activity during the 17:00-23:59 daypart by individual channels within these groups we see that these trends vary on a channel-by-channel basis and is likely to be driven, in part, by viewing habits/programming shown at particular times of day (Figure 61). For example, ITV1 accounts for relatively higher proportions of alcohol impacts between 19:00-21:59, but Channel 4 accounts for above-average shares later at night. Analysis of the 3, 4 and 5 portfolio channels shows that E4 and ITV2 represent the greatest shares of impacts in this group.

While the overall share of impacts represented by the channels in the music group is relatively low, post-21:00 this level rises above the average of 2.9% across the whole day. Many channels contribute towards this trend, one of them being VIVA which accounted for almost a third of all the alcohol impacts on music channels between 21:00-21:59 (1.2%) and almost half of those during the 22:00-22:59 slot (2.5%).

Figure 61: Alcohol impacts by channel as a share of total alcohol impacts by hour – Children 4-15, 2011

	Whole day	1700-1759	1800-1859	1900-1959	2000-2059	2100-2159	2200-2259	2300-2359
Total alcohol Impacts, millions	1,428.7	98.0	92.6	140.2	195.0	250.4	187.9	100.9
Channels 3, 4 and 5 (total)	34.6%	44.1%	20.6%	43.8%	43.8%	41.2%	34.5%	36.1%
ITV1	16.3%	13.0%	13.3%	37.6%	24.5%	17.9%	6.3%	10.5%
Channel 4	11.5%	25.0%	3.0%	2.8%	7.9%	14.2%	17.4%	18.3%
Five	6.8%	6.2%	4.3%	3.3%	11.4%	9.1%	10.8%	7.3%
3, 4 and 5 Portfolio (total)*	26.7%	14.6%	30.5%	23.1%	25.3%	26.7%	34.1%	32.3%
Channel 4+1	1.8%	1.6%	4.6%	0.4%	0.4%	1.1%	2.6%	4.2%
4Music	1.0%	0.0%	0.1%	0.0%	0.0%	2.1%	1.8%	2.3%
5 USA	1.2%	0.9%	0.7%	1.1%	1.2%	1.7%	1.9%	1.3%
5*	1.0%	0.4%	4.1%	1.3%	1.0%	1.1%	1.2%	1.1%
E4	3.8%	0.0%	0.0%	0.1%	9.1%	5.0%	5.6%	4.2%
E4+1	1.7%	0.0%	0.0%	0.0%	0.0%	3.6%	2.6%	3.3%
ITV2	4.7%	3.0%	3.8%	4.5%	3.5%	3.8%	7.6%	5.0%
Sports	10.3%	13.6%	16.4%	10.6%	9.7%	4.5%	3.4%	3.6%
Music*	2.9%	0.7%	0.8%	1.0%	0.5%	3.8%	5.3%	4.5%
VIVA	0.9%	0.1%	0.1%	0.0%	0.0%	1.2%	2.5%	1.0%
Movies	0.7%	0.7%	0.8%	0.6%	0.4%	0.5%	0.5%	0.9%
Other	24.9%	26.3%	30.9%	20.8%	20.3%	23.4%	22.3%	22.7%

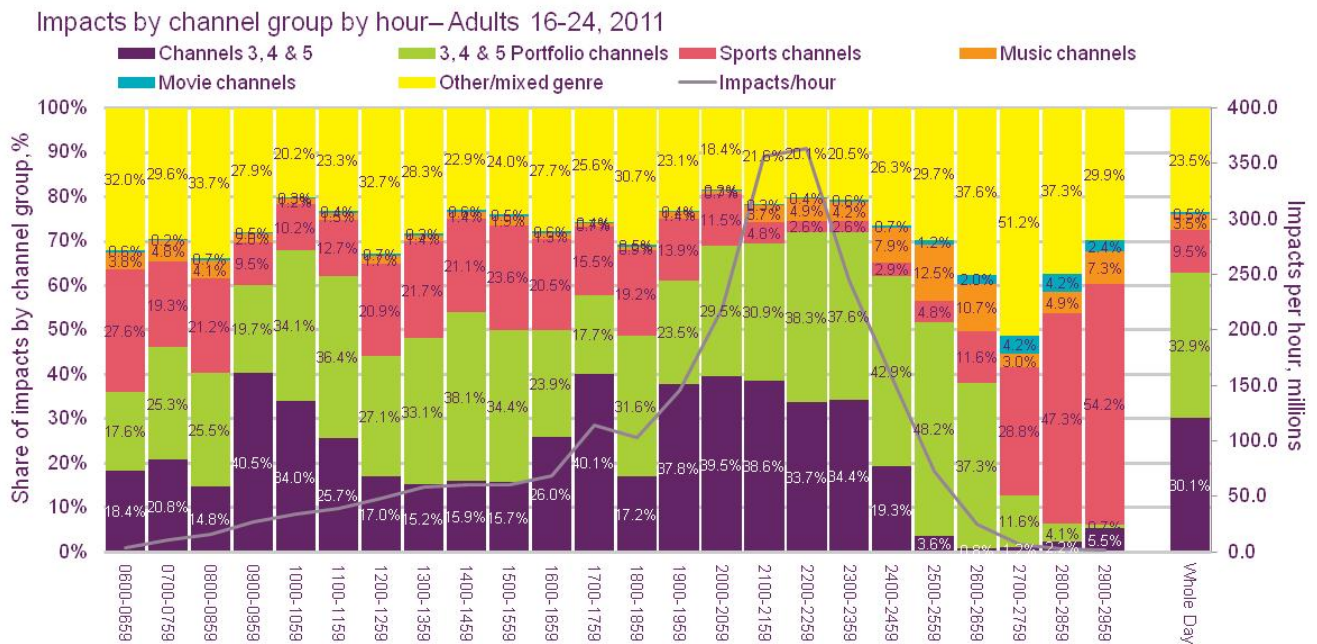
Source: BARB/Nielsen Monitor - As a percentage of total alcohol impacts per hour

*Channel group totals shown with only select channels within each group listed which illustrate the change in impacts more markedly.

Similar trends are noted among children aged 4-9 and 10-15 – corresponding charts can be found in Annex 1 (Figure 93-96).

The distribution of alcohol impacts for 16-24 year olds by channel group by hour shows similar patterns with a shift from the channels 3, 4 and 5 to the portfolio channels after 22:00 (Figure 62). Sports channels represent above-average proportions of alcohol impacts per hour during the day.

Figure 62: Alcohol impacts by channel group by hour- Adults 16-24, 2011



Source: BARB /Nielsen Monitor

Detailed analysis of these trends by individual channels shows similar patterns to those for children aged 4-15 with ITV1 accounting for the greatest shares of impacts between 19:00-20:59 (Figure 63). Later in the evening Channel 4 and Five account for above-average proportions of impacts. Among the 3, 4 and 5 portfolio channels, E4, E4+1 and ITV2 account for the greatest share of alcohol advertising seen across channels in this group.

During the earlier peak between 17:00-17:59, channels 3, 4 and 5 accounted for 40.1% of alcohol impacts seen in that hour – with 24.2% seen on Channel 4. During the dip in impacts between 18:00-18:59, activity moves to the portfolio channels (31.6% of all alcohol impacts in that hour), with Channel 4+1 accounting for 6.2% of all alcohol impacts in the slot.

Figure 63: Alcohol impacts by channel as a share of total alcohol impacts by hour – Adults 16-24, 2011

	Whole day	1700-1759	1800-1859	1900-1959	2000-2059	2100-2159	2200-2259	2300-2359
Total alcohol Impacts, millions	2245.6	114.7	103.3	145.7	219.9	356.6	363.9	245.4
Channels 3, 4 and 5 (total)	30.1%	40.1%	17.2%	37.8%	39.5%	38.6%	33.7%	34.4%
ITV1	10.8%	10.9%	10.0%	31.2%	20.9%	13.1%	3.4%	7.3%
Channel 4	13.4%	24.2%	3.4%	3.3%	8.6%	16.6%	21.4%	20.6%
Five	5.9%	5.0%	3.7%	3.3%	10.0%	8.9%	8.8%	6.5%
3, 4 and 5 Portfolio (total)*	32.9%	17.7%	31.6%	23.5%	29.5%	30.9%	38.3%	37.6%
Channel 4+1	3.0%	2.0%	6.2%	0.5%	0.5%	1.2%	3.5%	6.3%
4Music	1.5%	0.0%	0.1%	0.0%	0.0%	2.5%	2.7%	2.6%
5 USA	1.5%	0.9%	1.2%	1.6%	2.1%	2.3%	1.8%	1.8%
5*	1.1%	1.1%	3.4%	1.5%	1.5%	1.3%	1.4%	1.5%
E4	6.9%	0.1%	0.0%	0.2%	13.6%	8.1%	9.0%	6.2%
E4+1	3.7%	0.1%	0.0%	0.0%	0.0%	4.6%	3.8%	5.6%
ITV2	5.0%	4.2%	4.0%	4.6%	3.0%	3.2%	7.1%	4.2%
Sports	9.5%	15.5%	19.2%	13.9%	11.5%	4.8%	2.6%	2.6%
Music*	3.5%	0.7%	0.9%	1.4%	0.7%	3.7%	4.9%	4.2%
VIVA	1.1%	0.1%	0.0%	0.0%	0.0%	0.9%	2.1%	0.8%
Movies	0.5%	0.4%	0.5%	0.4%	0.3%	0.3%	0.4%	0.6%
Other	23.5%	25.6%	30.7%	23.1%	18.4%	21.6%	20.1%	20.5%

Source: BARB/Nielsen Monitor - As a percentage of total alcohol impacts per hour

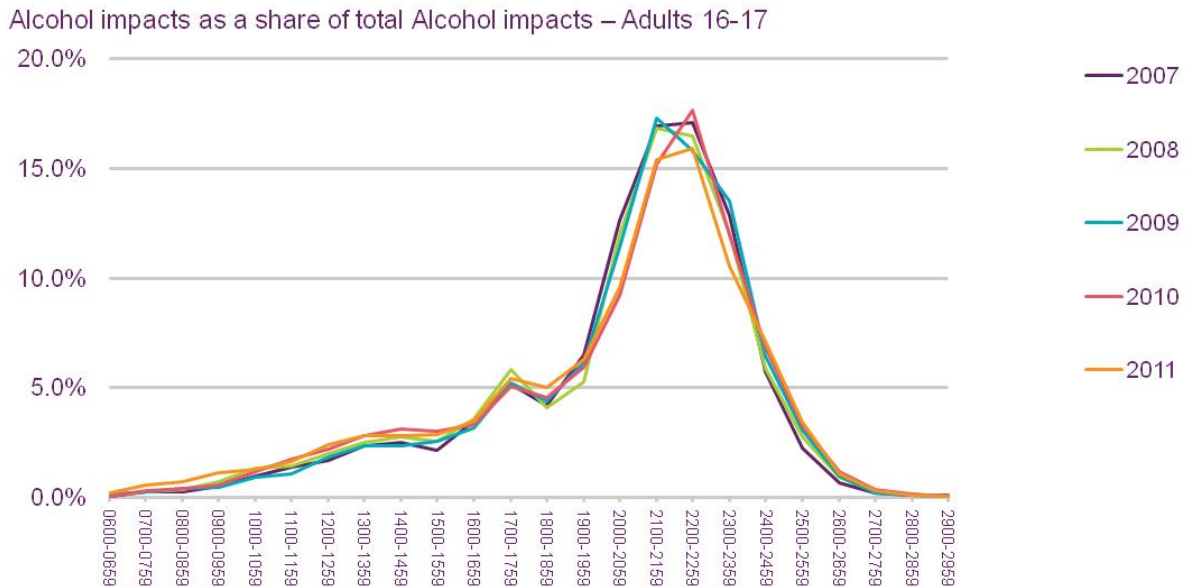
*Channel group totals shown with only select channels within each group listed which illustrate the change in impacts more markedly.

4.4 Exposure to alcohol advertising: 16-17 year olds

Analysis of the amount of alcohol advertising seen by 16-17 year olds is based on BARB data generated using the Kantar Media system, *Infosys*. This analysis enables us to look at trends among young adults at a more detailed level, and based on those below the legal drinking age. As this is not a standard BARB audience and has been created for the purposes of this analysis, some caution should be exercised when interpreting this data.

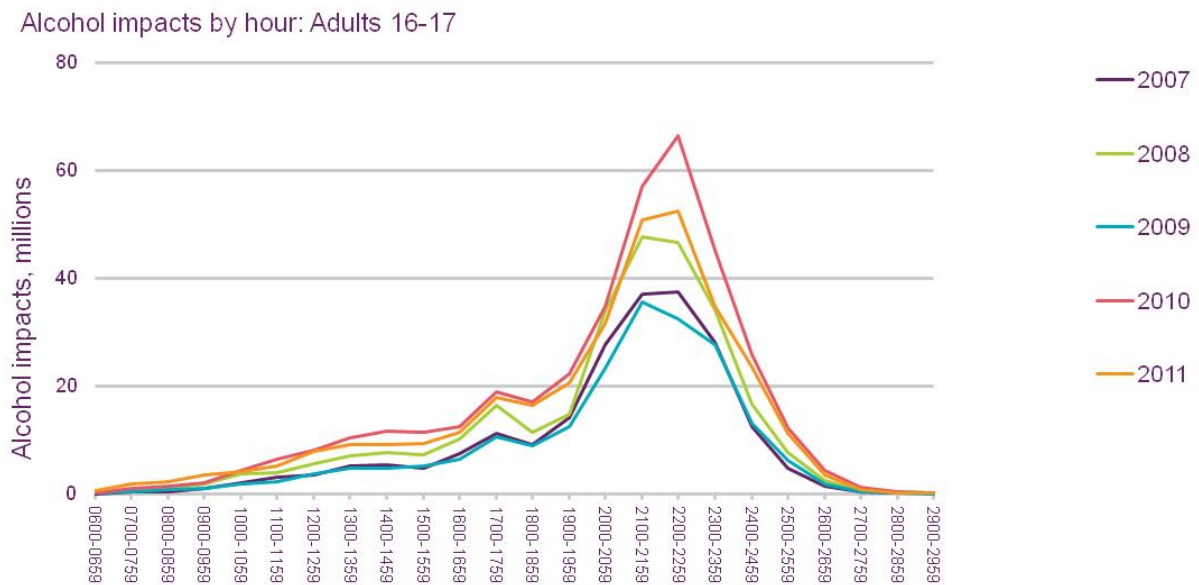
The trends in the distribution of alcohol impacts across the day follow those seen for children and adults aged 16-24. Exposure peaks during the 22:00-22:59 slot, with 15.9% of all alcohol impacts seen during this daypart in 2011 (Figure 64 and 65).

Figure 64: Alcohol impacts by hour as a share of total alcohol impacts, Adults 16-17



Source: BARB /Infosys – As a percentage of total Alcohol impacts
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

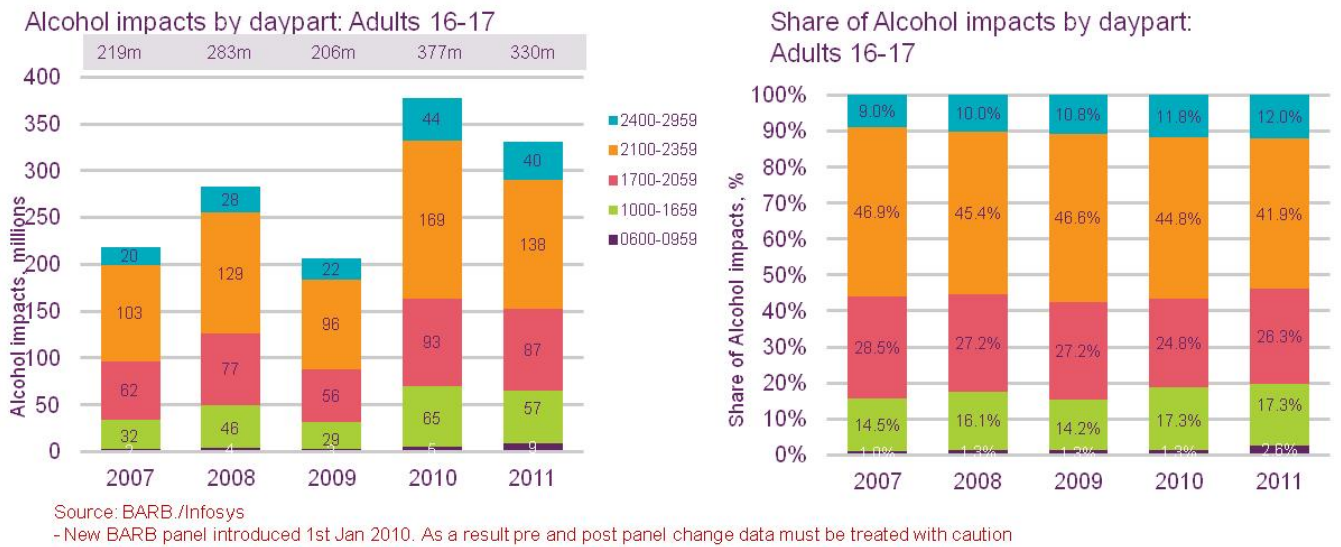
Figure 65: Alcohol impacts by hour, Adults 16-17



Source: BARB /Infosys – Figures show total number of impacts per hour across the whole year.
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

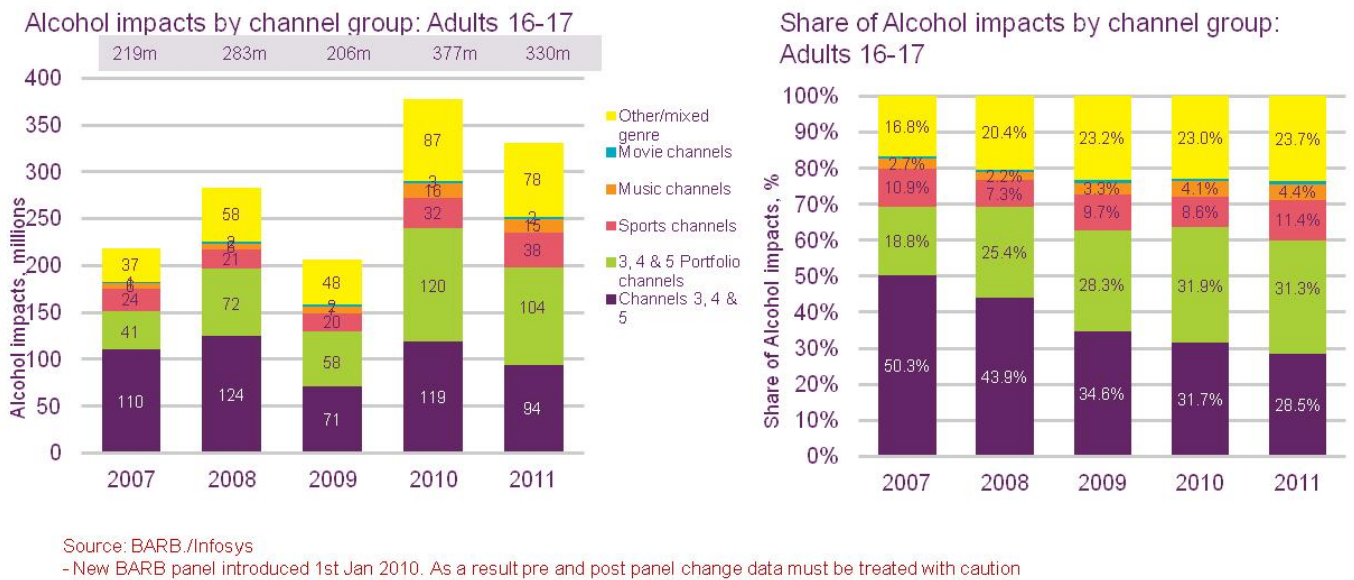
Following a peak in exposure to alcohol advertising during 2010, the amount of alcohol advertising seen by 16-17 year olds fell from 377m impacts to 330m impacts in 2011. The majority of alcohol impacts were seen post-21:00 in 2011 (53.9%) – with 46.1% of all alcohol advertising seen before 21:00.

Figure 66: Alcohol impacts by daypart, Adults 16-17



Similar to trends observed for children and 16-24 year olds, there has been a decline in alcohol impacts across channel 3, 4 and 5, with a corresponding increase in the proportion of impacts seen across the portfolio channels. Compared with viewing by channel group (Figure 26), the portfolio channels and sports channels both accounted for greater proportions of impacts in 2011 (31.3% and 11.4% respectively) than viewing (26.2% and 5.2% respectively).

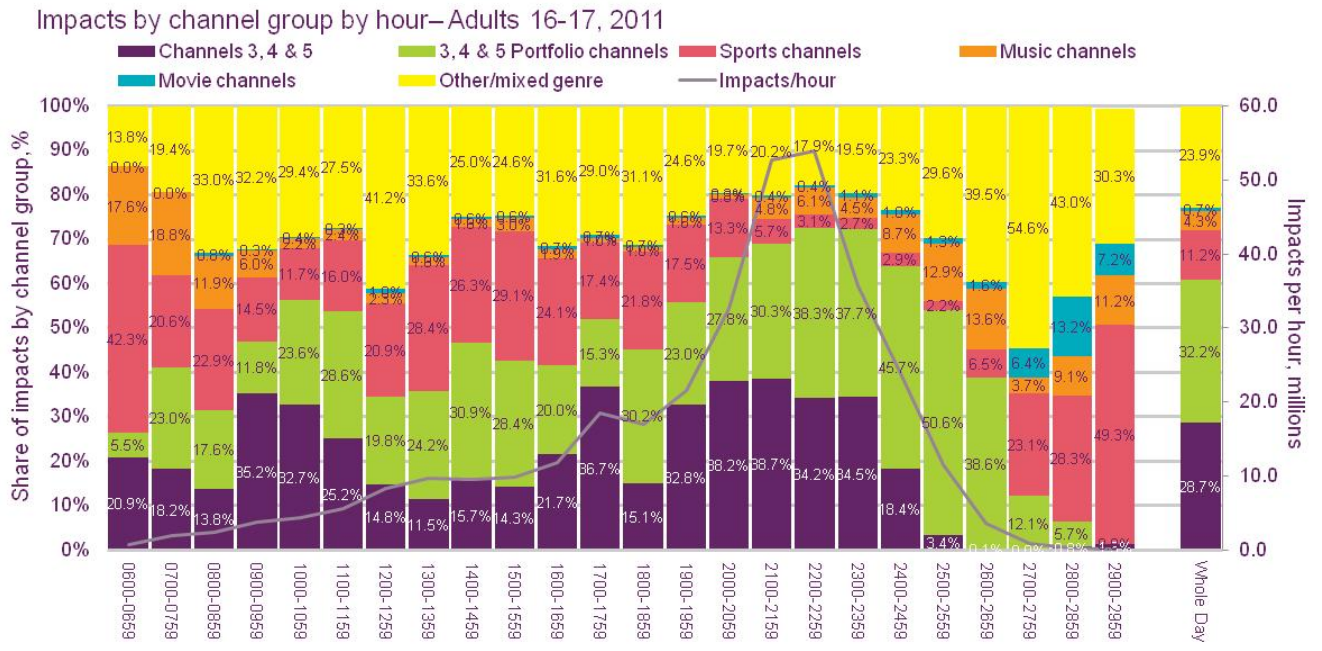
Figure 67: Alcohol impacts by channel group, Adults 16-17



Among 16-17 year olds, channels 3, 4 and 5 account for above-average proportions of alcohol impacts during peak hours when compared with impact distribution across the 'whole day' – there is a shift from these channels to the portfolio and music channels post- 22:00 (Figure 68).

At a channel level, ITV1 accounts for the greatest proportion of alcohol impacts between 19:00-20:59. 4Music, E4, E4+1 and ITV2 account for the largest proportion of activity across the portfolio channel group (Figure 69).

Figure 68: Alcohol impacts by channel group by hour- Adults 16-17, 2011



Note: The numbers for the 'whole day' breakdown in alcohol impacts shown in Figure 68 above differ slightly from the numbers shown in Figure 67. This is due to the fact that the data for the two charts were generated on different days and data can often be amended which results in slight variations.

Figure 69: Alcohol impacts by channel as a share of total alcohol impacts by hour – Adults 16-17, 2011

	Whole day	1700-1759	1800-1859	1900-1959	2000-2059	2100-2159	2200-2259	2300-2359
Total alcohol Impacts, millions	340.3	18.5	17.0	21.6	32.6	52.7	53.9	35.7
Channels 3, 4 and 5 (total)	28.7%	36.7%	15.1%	32.8%	38.2%	38.7%	34.2%	34.5%
ITV1	10.3%	11.1%	9.4%	26.4%	20.6%	14.1%	3.7%	7.0%
Channel 4	12.9%	21.1%	2.8%	3.3%	8.2%	16.7%	21.6%	21.4%
Five	5.5%	4.4%	2.9%	3.0%	9.5%	7.9%	9.0%	6.1%
3, 4 and 5 Portfolio (total)*	31.2%	15.3%	30.2%	23.0%	27.8%	30.3%	38.3%	37.7%
Channel 4+1	2.7%	1.1%	4.7%	0.5%	0.4%	1.3%	3.0%	6.3%
4Music	1.7%	0.1%	0.2%	0.1%	0.0%	3.9%	2.7%	2.8%
5 USA	1.6%	1.1%	1.3%	1.9%	1.8%	1.7%	2.1%	2.6%
5*	0.9%	0.6%	2.5%	1.7%	1.2%	1.1%	1.4%	1.0%
E4	6.4%	0.0%	0.0%	0.1%	12.3%	8.1%	9.3%	5.8%

Children's and young people's exposure to alcohol advertising

E4+1	3.4%	0.1%	0.0%	0.0%	0.0%	4.0%	3.3%	5.3%
ITV2	4.3%	3.1%	3.1%	3.8%	2.4%	2.6%	7.1%	4.2%
Sports	11.2%	17.4%	21.8%	17.5%	13.3%	5.7%	3.1%	2.7%
Music*	4.3%	1.0%	1.0%	1.6%	0.8%	4.8%	6.1%	4.5%
VIVA	1.3%	0.1%	0.0%	0.0%	0.0%	1.2%	2.4%	1.1%
Movies	0.7%	0.7%	0.7%	0.6%	0.3%	0.4%	0.4%	1.1%
Other	23.9%	29.0%	31.1%	24.6%	19.7%	20.2%	17.9%	19.5%

Source: BARB/Infosys - As a percentage of total alcohol impacts per hour

*Channel group totals shown with only select channels within each group listed which illustrate the change in impacts more markedly.

Section 5

Comparative analysis

5.1 Introduction

As the analysis presented in Section 4 and Section 5 demonstrates, we have highlighted a number of trends in viewing, advertising activity and exposure to alcohol advertising. This section brings together relevant data from across the preceding sections to produce three comparative analyses in order to summarise key conclusions. The data presented below looks at trends among all children aged 4-15 and adults aged 16-24.

5.2 Daypart analysis

Analysis of spot distribution, 'adult' commercial viewing and exposure to alcohol advertising by daypart can be summarised below in Figure 70 (based on Figure 15, Figure 21, Figure 38, Figure 54 and Figure 57). The data shows that, in 2011, while 49.1% of all alcohol spots were shown pre-21:00, 56.4% of all alcohol impacts among children 4-15 were seen during this slot. This is likely to be a result of the much higher level of viewing among children that takes place during this time period (73.0%).

Furthermore while 24.5% of all alcohol spots broadcast in 2011 were shown between 21:00-23:39, relatively higher proportions of alcohol impacts were seen during this slot; 37.7% of children's alcohol impacts and 43.0% of 16-24 year olds' alcohol impacts. Again, this is likely to be driven by viewing figures, with 22.7% of all children's viewing and 27.9% of viewing by 16-24 year olds taking place during this daypart.

Figure 70: Summary of daypart trends, 2011

2011	Share of 'adult' commercial viewing		Share of alcohol spots	Share of alcohol impacts	
	Children 4-15	Adults 16-24		Children 4-15	Adults 16-24
Pre-21:00	73.0%	62.8%	49.1%	56.4%	45.1%
21:00-23:59	22.7%	27.9%	24.5%	37.7%	43.0%
Post-midnight	4.3%	9.4%	26.4%	5.9%	11.9%

Further comparison of spots, viewing and impacts data by hour during the key evening hours is presented in Figure 71 and Figure 72 (corresponding charts for children aged 4-9 and 10-15 years can be found in Annex 1- Figure 97 and 98).

The data suggests that while children's viewing tails off after 21:00, a substantial audience continues to view, particularly in the first hour between 21:00-21:59. Viewing among 16-24 year olds peaks between 21:00-21:59 and continues later into the night than children. At the same time, the volume of alcohol advertising shown increases post-21:00. It is therefore likely that this combination of continued viewing and the increase in spot advertising post-21:00 is driving the level of impacts seen after 21:00, particularly during the 21:00-21:59 time slot.

Figure 71: Comparative analysis, Children 4-15

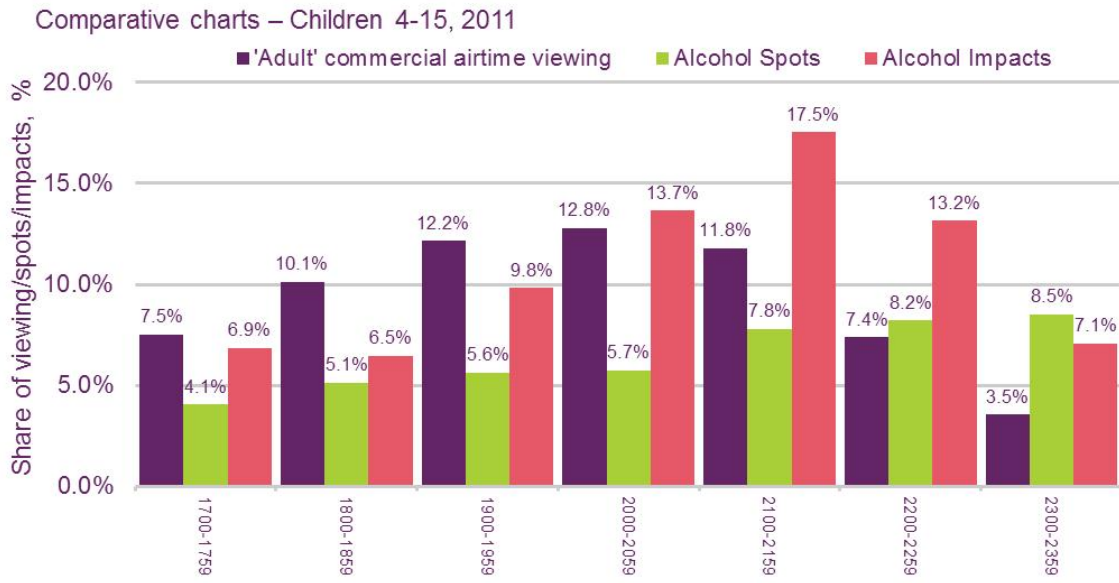
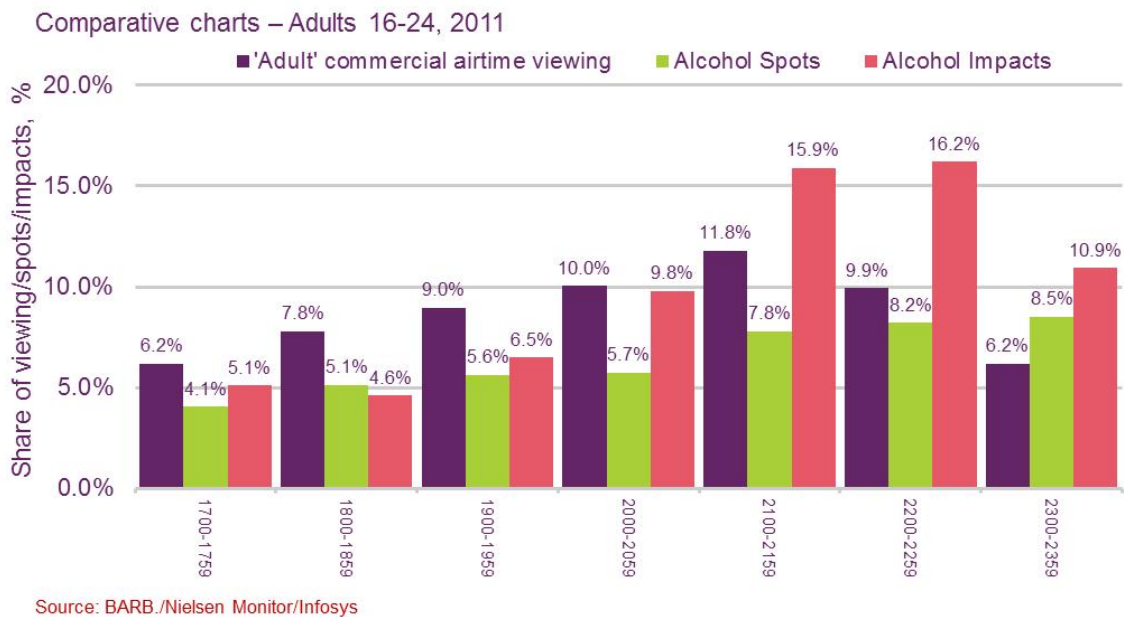


Figure 72: Comparative analysis, Adults 16-24



5.3 Channel group analysis

The key trends highlighted in the analysis of data by channel group are summarised below in Figure 73.

Figure 73: Summary of channel group trends, 2011

2011	Share of 'adult' commercial viewing		Share of alcohol spots	Share of alcohol impacts	
	Children 4-15	Adults 16-24		Children 4-15	Adults 16-24
Channels 3,4 and 5	37.4%	32.3%	1.3%	34.6%	30.1%
3, 4 and 5 portfolio channels	20.2%	27.4%	10.8%	26.7%	32.9%
Sports	4.6%	4.7%	13.7%	10.3%	9.5%
Music	4.1%	5.2%	13.9%	2.9%	3.5%

The data shows that while channels 3, 4 and 5 accounted for 1.3% of all alcohol spots in 2011, they accounted for the greatest share of viewing among children and adults aged 16-24 – and in turn a significant proportion of alcohol impacts.

Channels within the 3, 4 and 5 portfolio channels group accounted for 10.8% of alcohol spots - they also accounted for a fifth of children's viewing and over a quarter of viewing among 16-24 year olds. The increasing popularity of these channels along with the level of advertising shown is likely to have resulted in the relatively high proportion of alcohol impacts seen across this channel group.

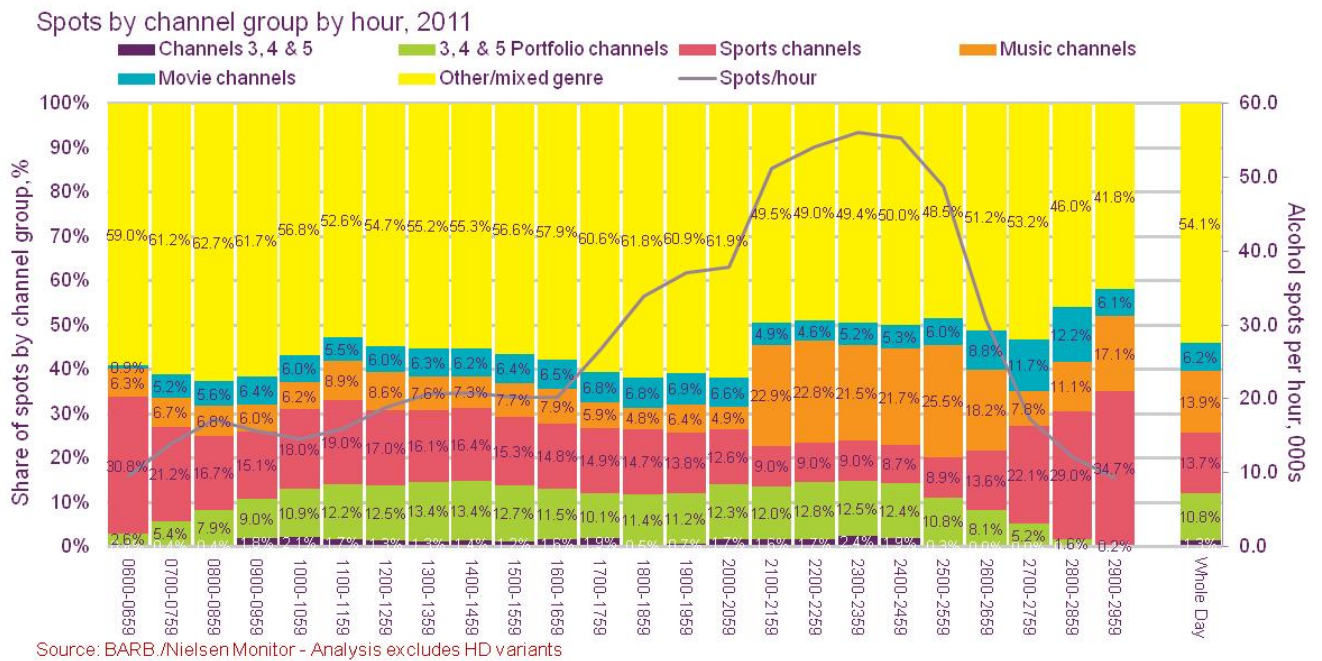
While sports channels accounted for less than 5% of viewing among children and 16-24 year olds, they accounted for around 10% of alcohol impacts in 2011. This is likely to have been as a result of the relatively high share of alcohol spots (13.7%) shown across this channel group.

Overall, music channels accounted for over 10% of alcohol spots and around 5% of viewing but less than 4% of alcohol impacts – so while these channels show a relatively high proportion of spots, the level of viewing to these channels does not result in a similar share of impacts.

5.4 Channel group by hour analysis

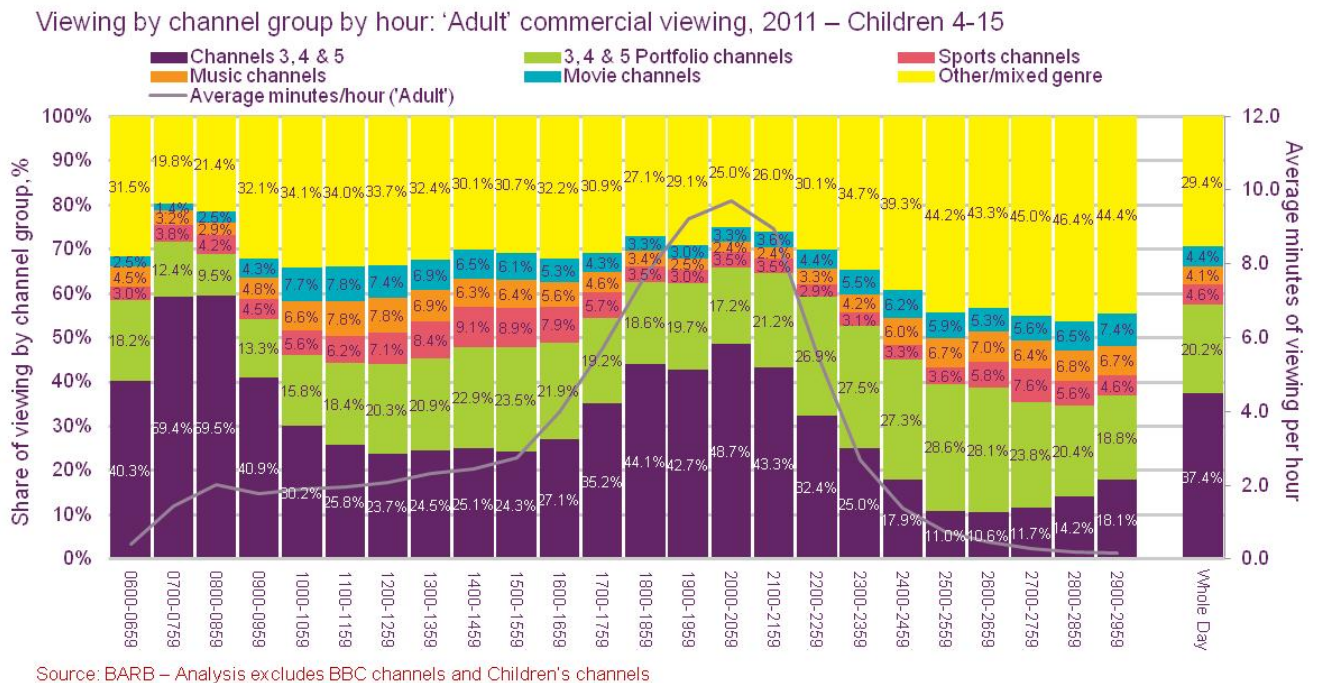
Analysis of the distribution of alcohol spots by channel group by hour shows that, in 2011, when compared with spot distribution across the entire day, above average proportions of alcohol spots were shown on portfolio and 'other' channels during the pre-21:00 evening period. After 21:00, portfolio channels continued to show above-average proportions of spots and there was a significant increase in the proportion of spots accounted for by music channels (Figure 74).

Figure 74: Alcohol spots by channel group by hour, 2011



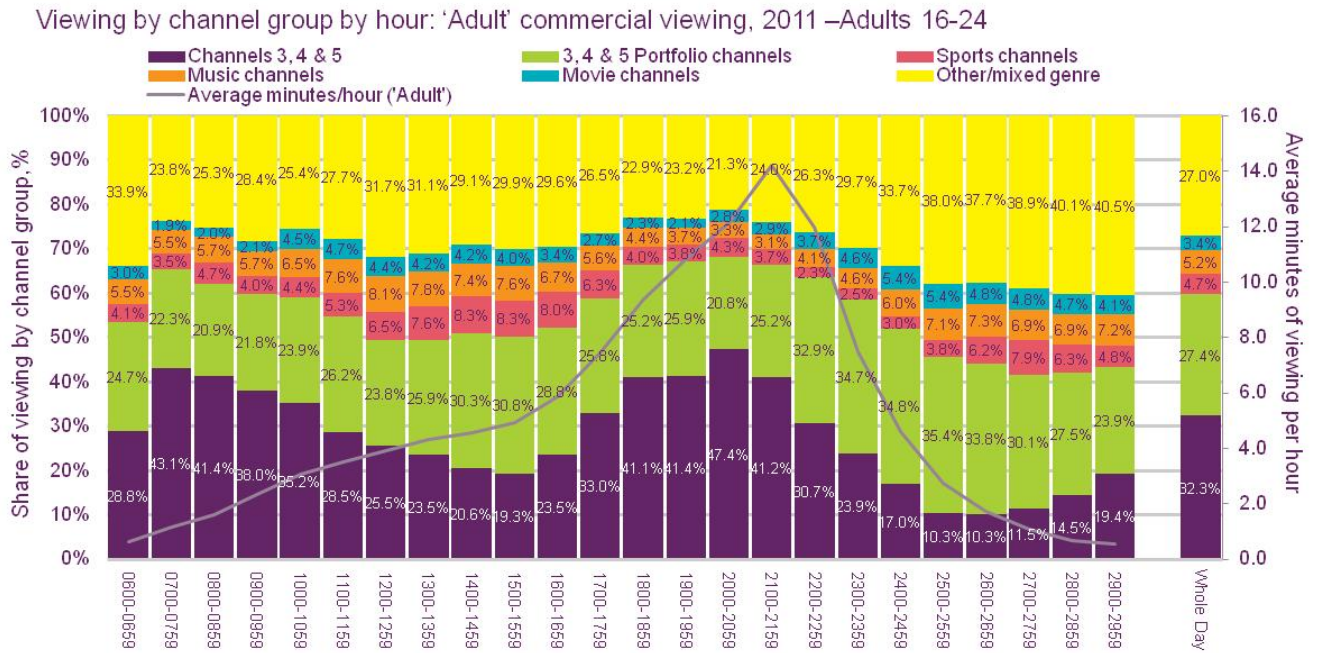
Among children aged 4-15, channels 3, 4 and 5 accounted for over 40% of viewing during the pre-21:00 peak hours in 2011. After 21:00, viewing moved towards the portfolio channels. Viewing to music channels represented a below average share during these hours compared with the 'whole day' average (Figure 75).

Figure 75: Viewing by channel group by hour, Children 4-15 - 2011



Among 16-24 year olds, channels 3, 4 and 5 dominated viewing during the peak hours in 2011 with the portfolio channels representing a greater proportion of viewing post-22:00. Viewing to channels within the music group represented a below-average share during these peak hours (Figure 76).

Figure 76: Viewing by channel group by hour, Adults 16-24 – 2011



Analysis of exposure to alcohol advertising by channel group by hour shows that, compared against the 'whole day' average, channels 3, 4 and 5 accounted for above-average proportions of alcohol impacts during the peak hours in 2011. There was an increase in exposure across the portfolio and music channels post-21:00 and an increase across the Other/mixed genre channels during the morning and post-midnight. (Figure 77). Similar trends are noted among 16-24 year olds (Figure 78).

Figure 77: Impacts by channel group by hour, Children 4-15 - 2011

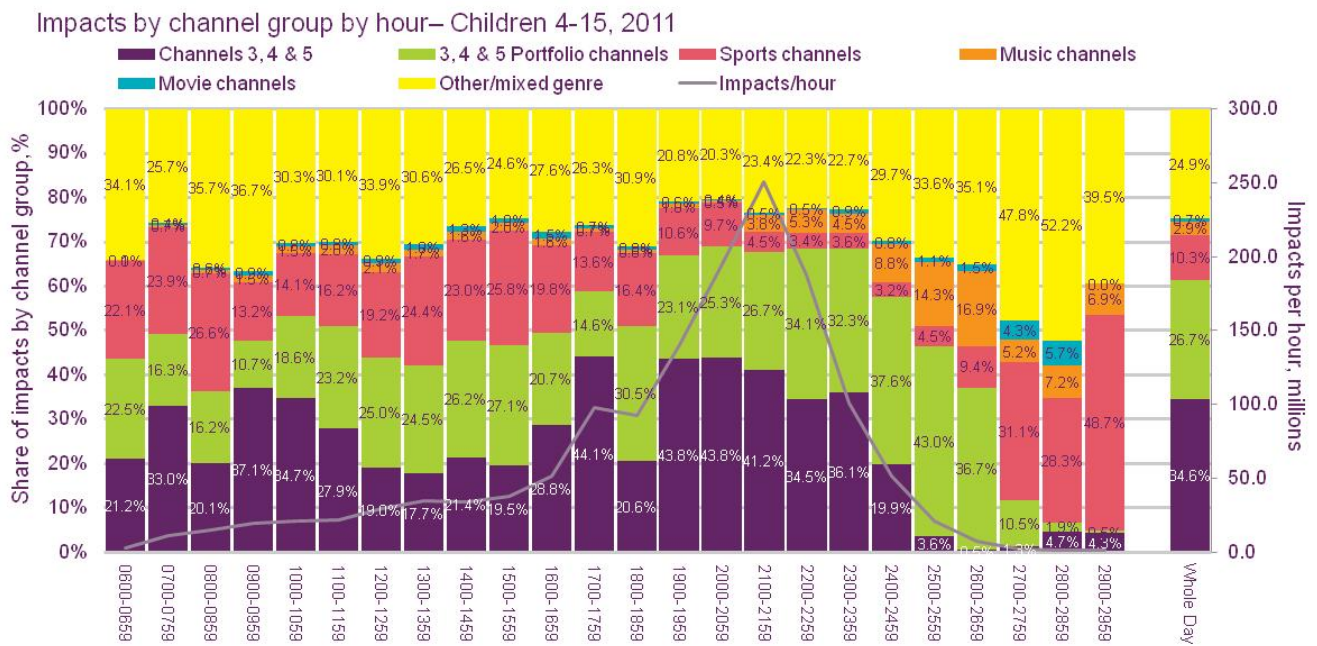
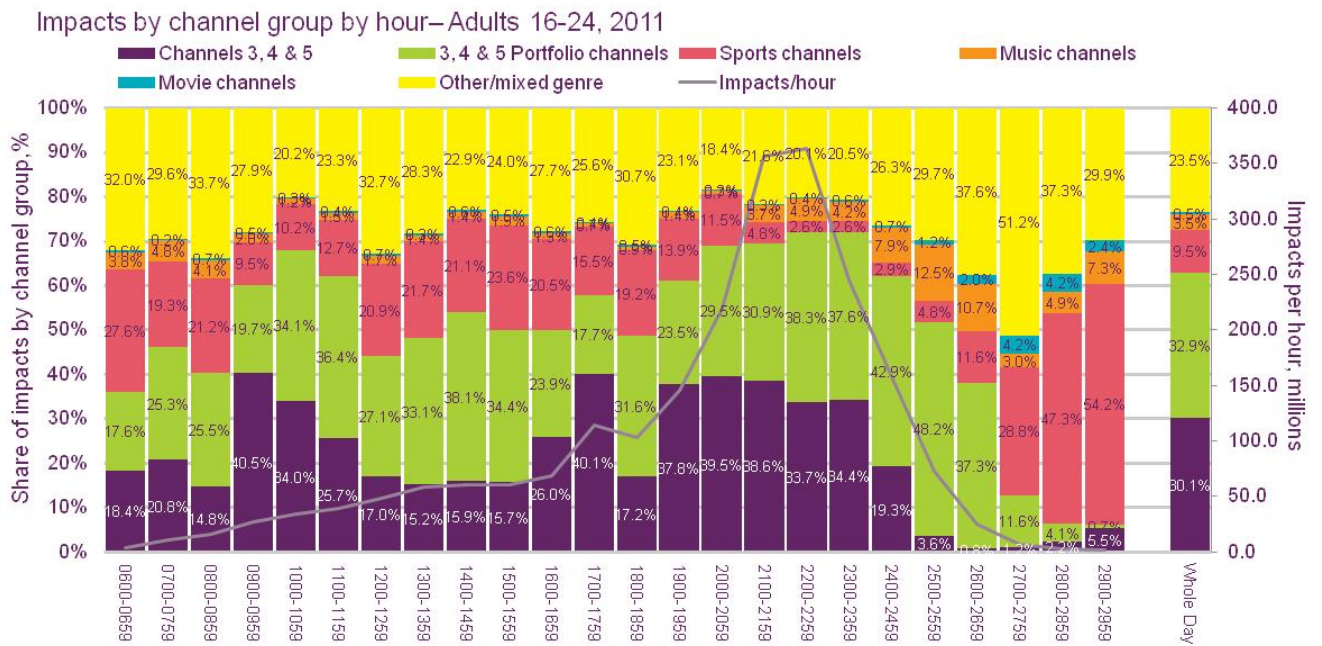


Figure 78: Impacts by channel group by hour, Adults 16-24 - 2011



Source: BARB /Nielsen Monitor

These results would suggest that a combination of effects is behind the peak in exposure to alcohol advertising during the evening and, in particular, post-21:00. These trends appear to be driven by three key channel groups; channels 3, 4 and 5; the 3, 4 and 5 portfolio channels; and music channels.

- a) **Channels 3, 4 and 5** – While the share of spots shown on these channels is relatively low, they account for high levels of peak-time viewing. Therefore it is likely that trends in viewing are resulting in above-average proportions of alcohol impacts seen across these channels in the evening compared with the ‘whole day’ average.
- b) **3, 4 and 5 portfolio channels** – The above average proportion of impacts shown across this channel group is driven by a combination of above-average proportions of spots being shown and viewing taking place on these channels during peaktime, particularly post-21:00.
- c) **Music channels** – Viewing to music channels during the evening peak accounts for below-average levels compared with the ‘whole day’. However post-21:00 there is a significant increase in the proportion of spots shown on these channels and it is likely that this increase in advertising activity rather than viewing levels is driving the above-average share of impacts shown across this channel group, particularly post-22:00.

Annex 1

Additional analysis

This annex presents extra charts referred to throughout Sections 4-6.

1.1 Viewing trends

Figure 79: 'Adult' commercial viewing by channel group, Children 4-9

Viewing by channel group: 'Adult' commercial viewing, Children 4-9

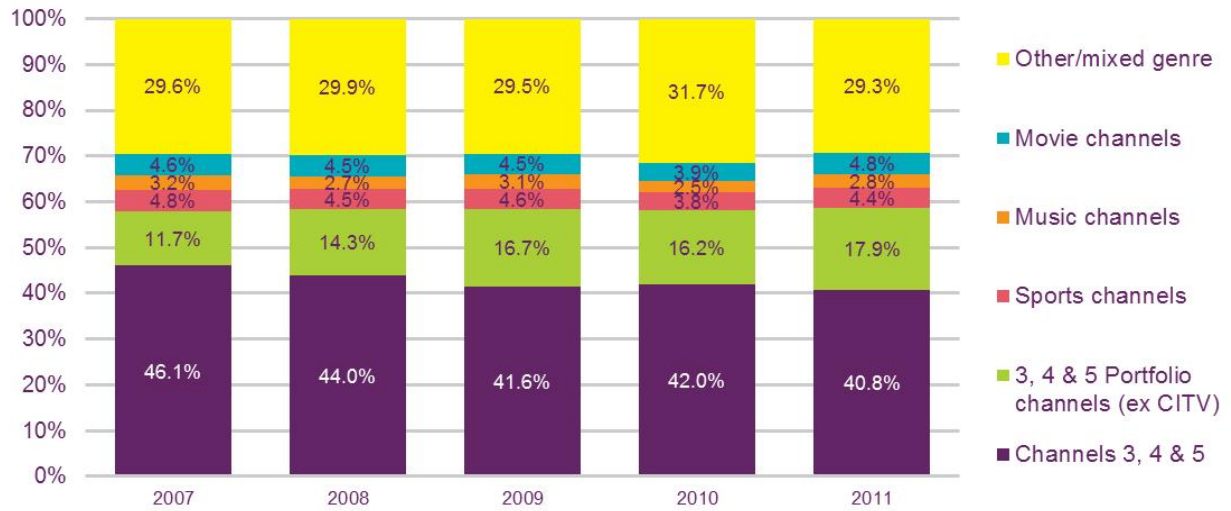


Figure 80: 'Adult' commercial viewing by channel group, Children 10-15

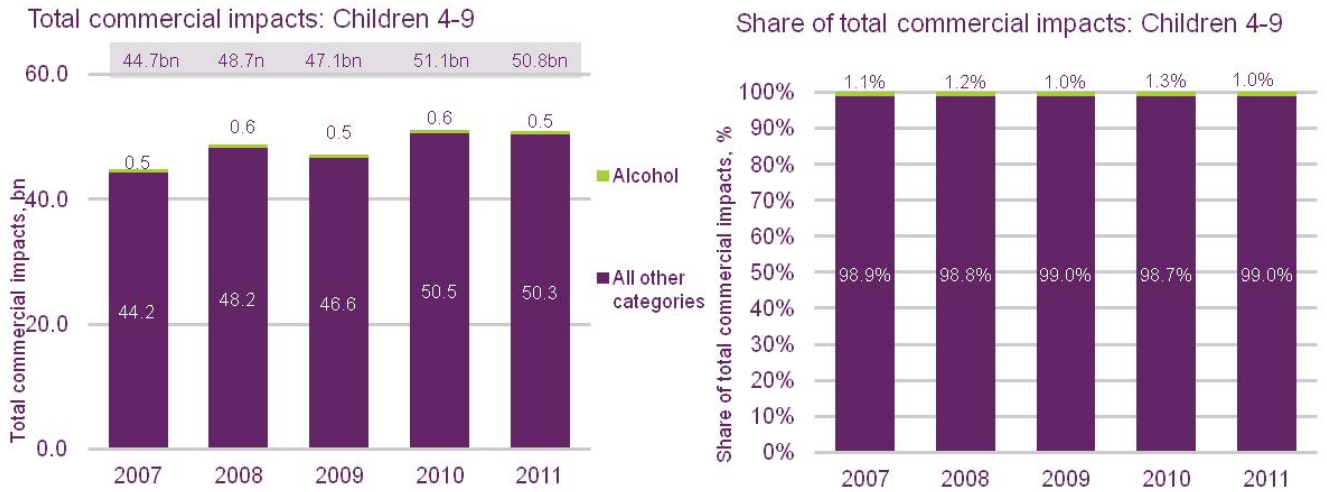
Viewing by channel group: 'Adult' commercial viewing, Children 10-15



Source: BARB- Analysis excludes BBC channels and Children's channels
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

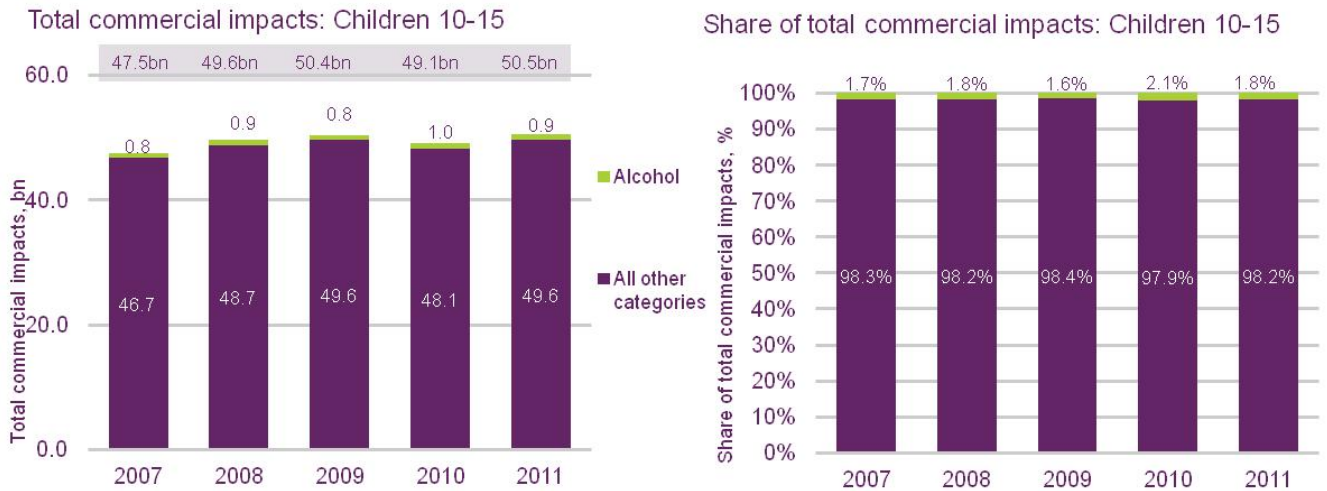
1.2 Exposure to alcohol advertising

Figure 81: Alcohol impacts as a share of total commercial impacts, Children 4-9



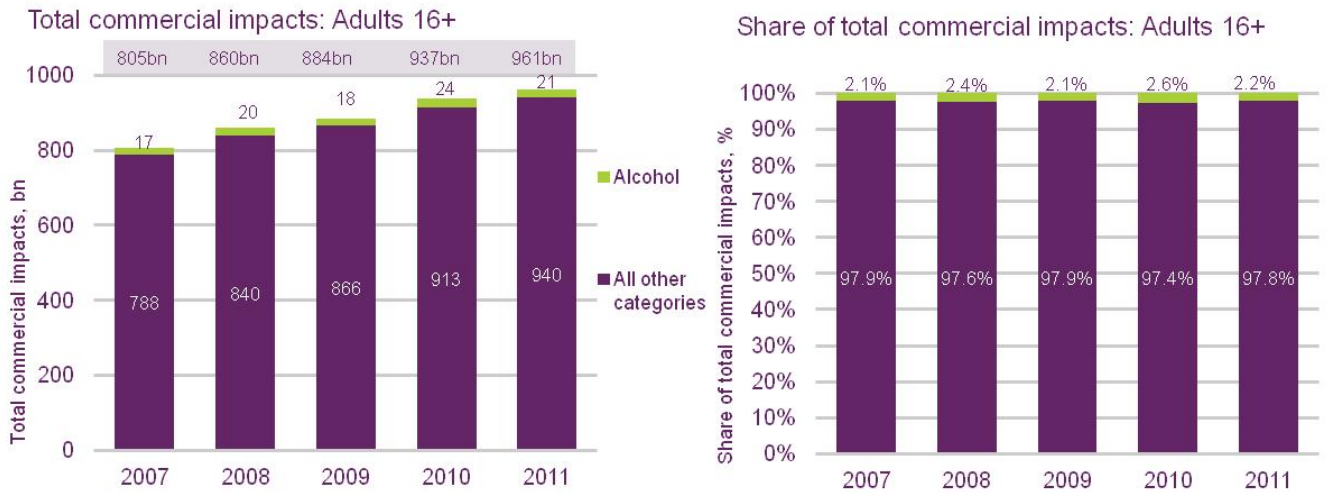
Source: BARB./Nielsen Monitor
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 82: Alcohol impacts as a share of total commercial impacts, Children 10-15



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

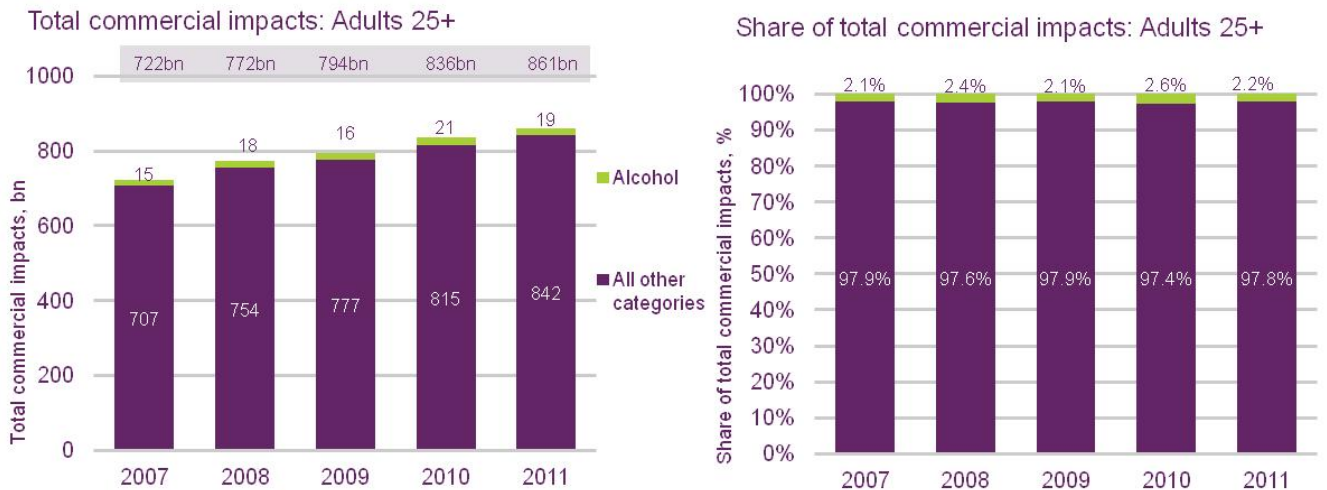
Figure 83: Alcohol impacts as a share of total commercial impacts, Adults 16 or over



Source: BARB /Nielsen Monitor

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

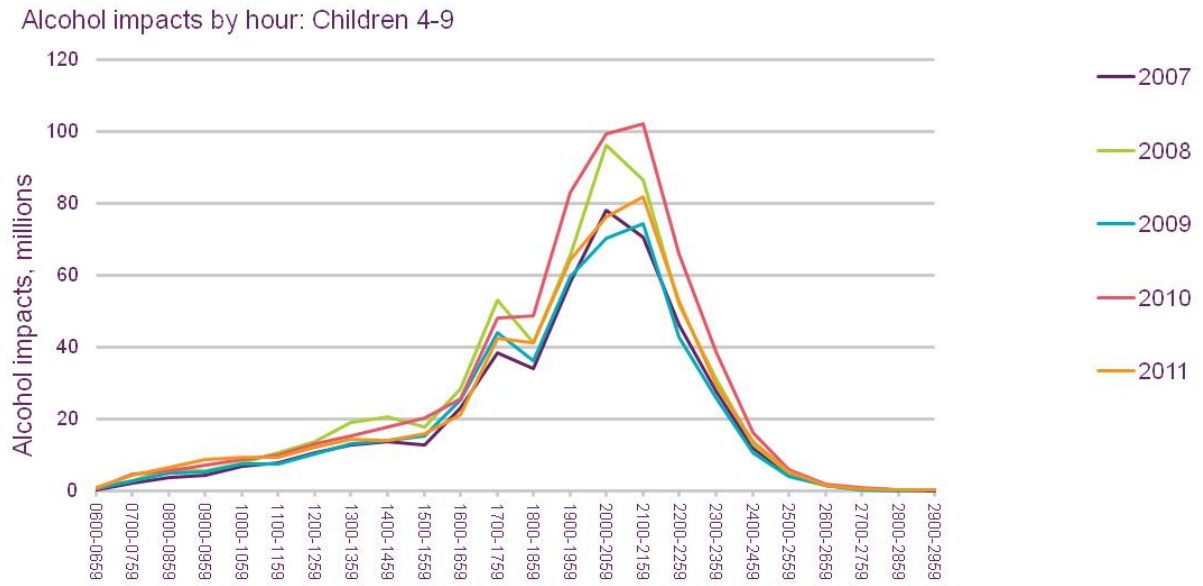
Figure 84: Alcohol impacts as a share of total commercial impacts, Adults 25 or over



Source: BARB /Nielsen Monitor

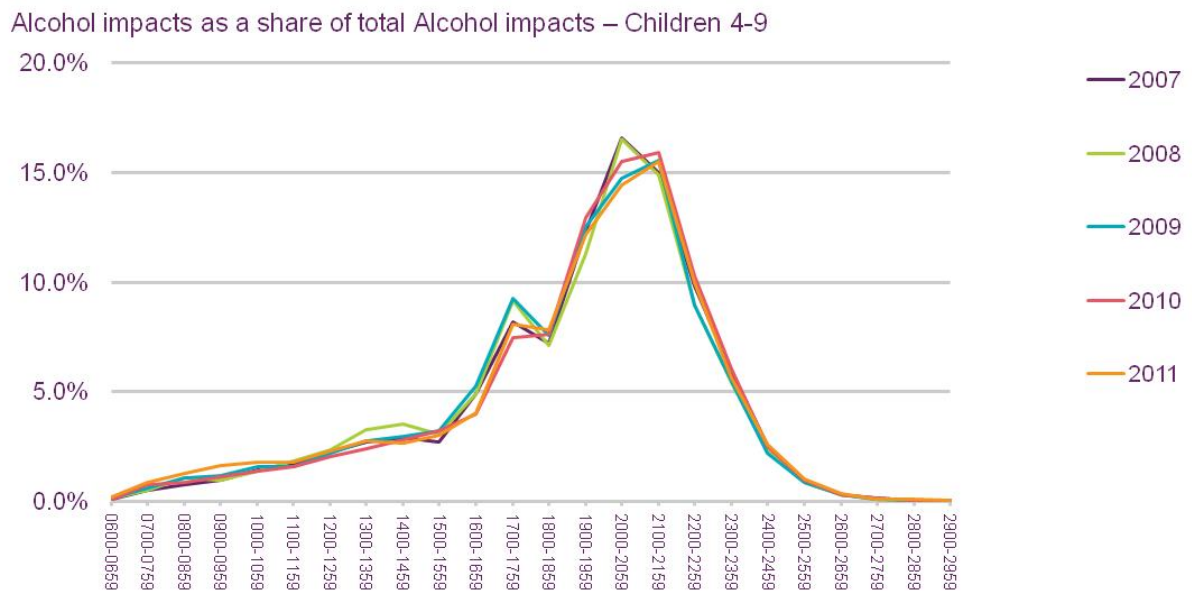
- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 85: Alcohol impacts by hour, Children 4-9



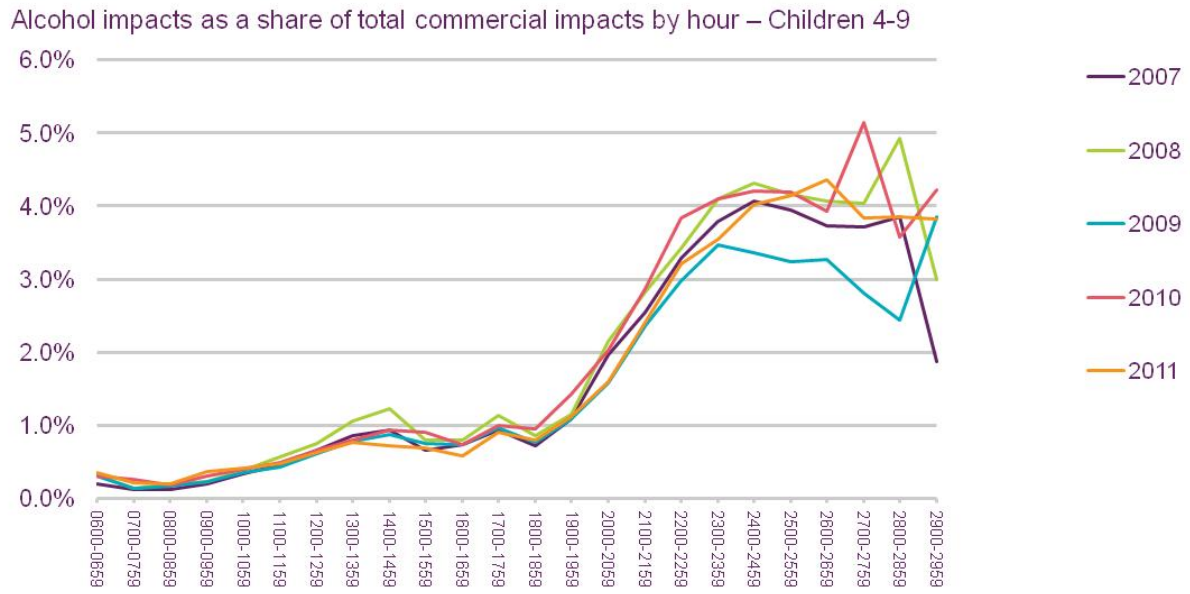
Source: BARB./Nielsen Monitor - Figures show total number of impacts per hour across the whole year
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 86: Alcohol impacts by hour as a share of total alcohol impacts, Children 4-9



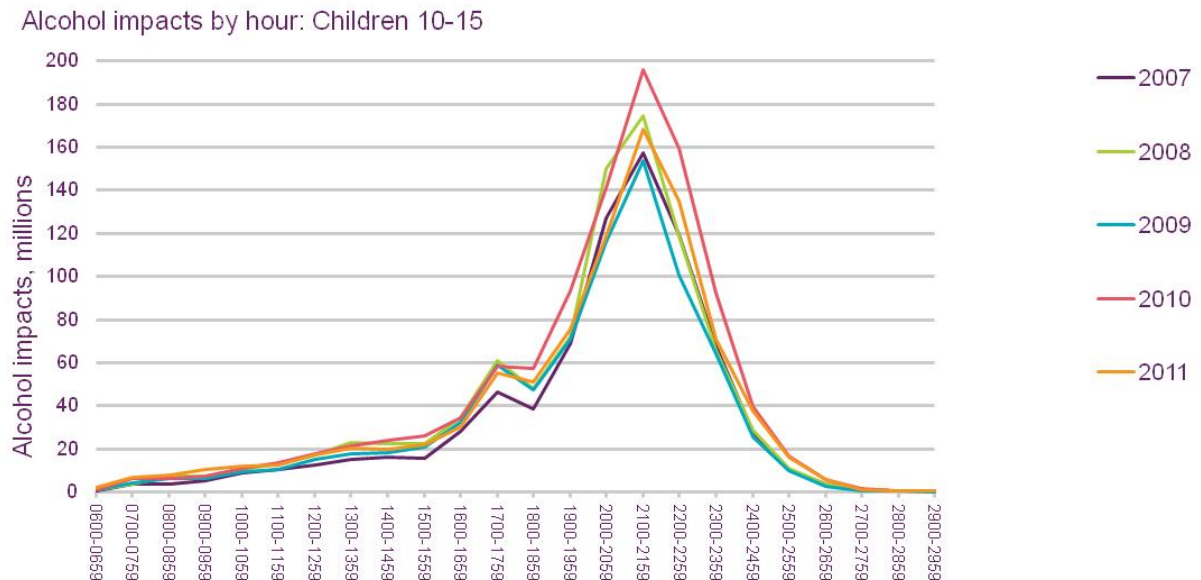
Source: BARB./Nielsen Monitor - As a percentage of total Alcohol impacts
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 87: Alcohol impacts as a share of total commercial impacts by hour, Children 4-9



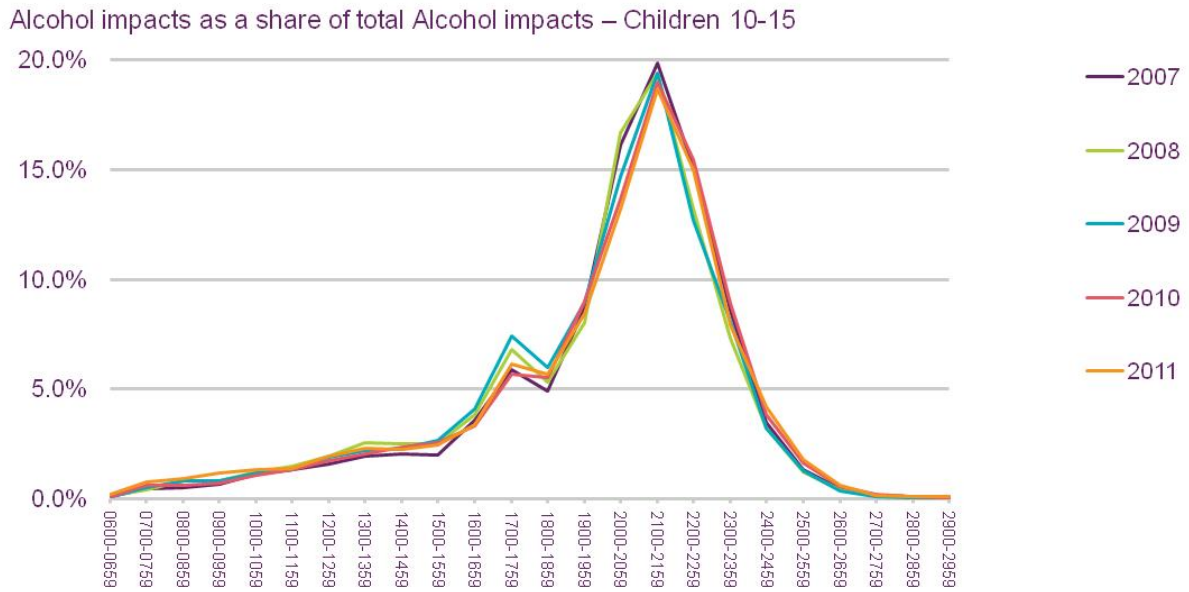
Source: BARB/NielsenMonitor - As a percentage of total commercial impacts per hour
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 88: Alcohol impacts by hour, Children 10-15



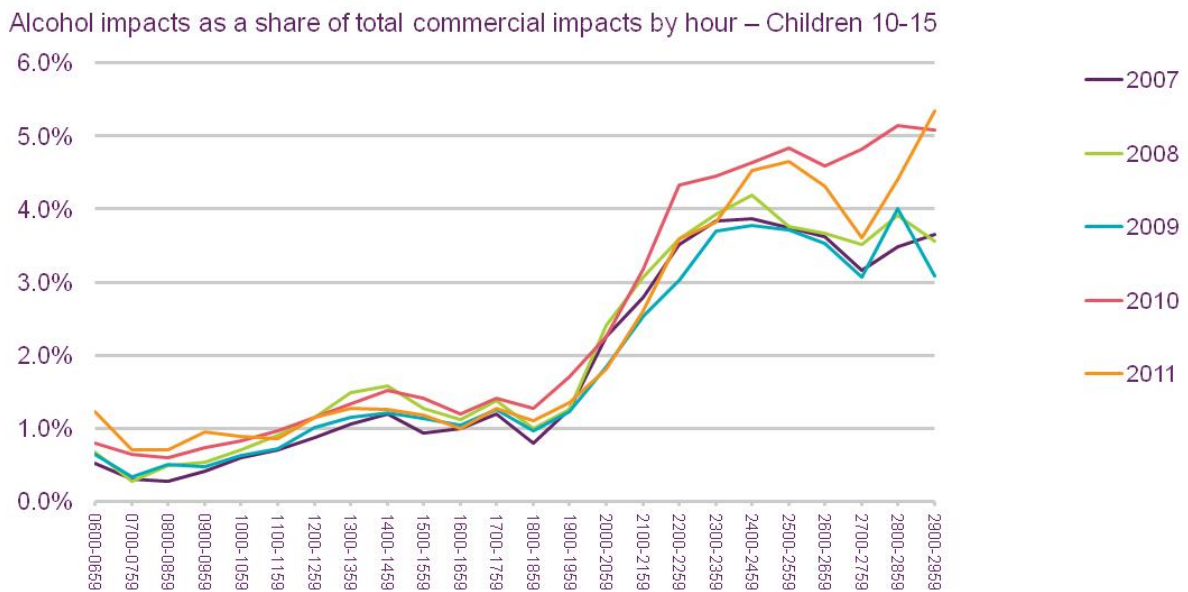
Source: BARB/NielsenMonitor - Figures show total number of impacts per hour across the whole year
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 89: Alcohol impacts by hour as a share of total alcohol impacts, Children 10-15



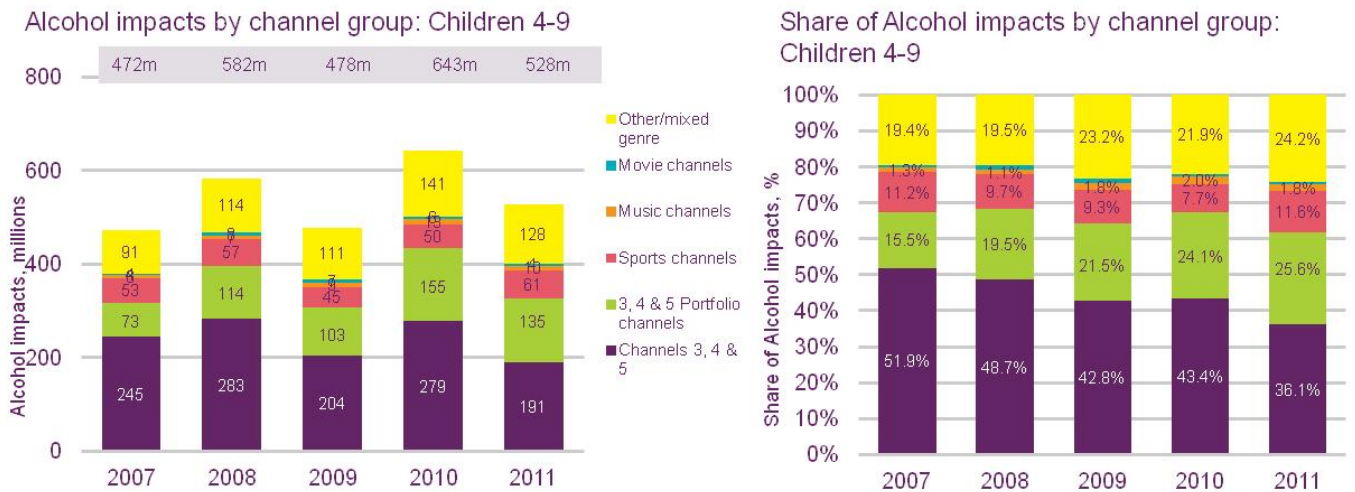
Source: BARB./Nielsen Monitor - As a percentage of total Alcohol impacts
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 90: Alcohol impacts as a share of total commercial impacts by hour, Children 10-15



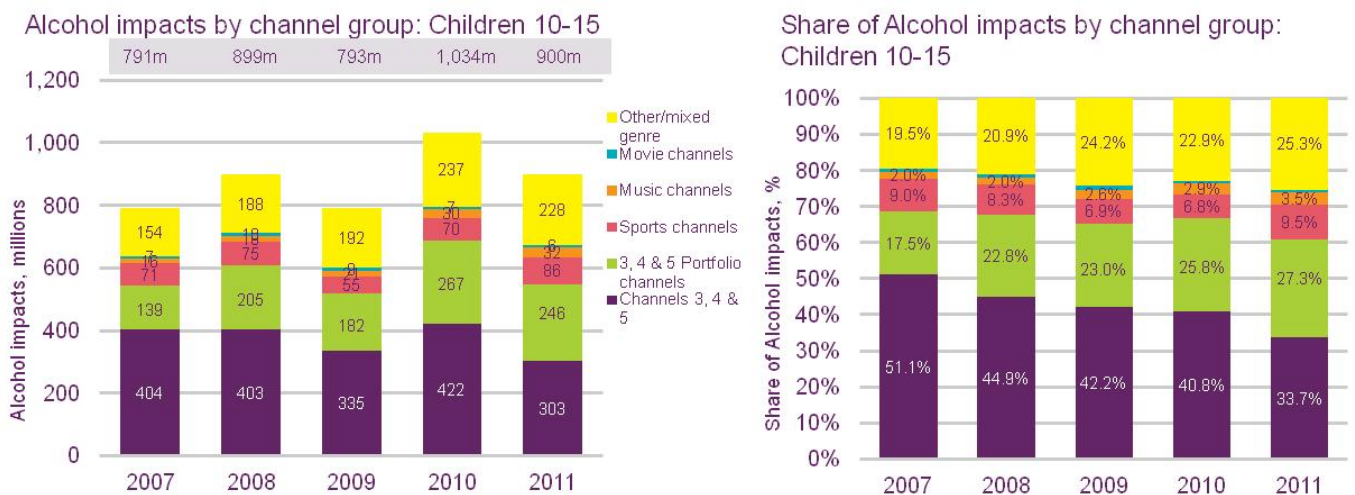
Source: BARB./Nielsen Monitor - As a percentage of total commercial impacts per hour
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 91: Alcohol impacts by channel group, Children 4-9



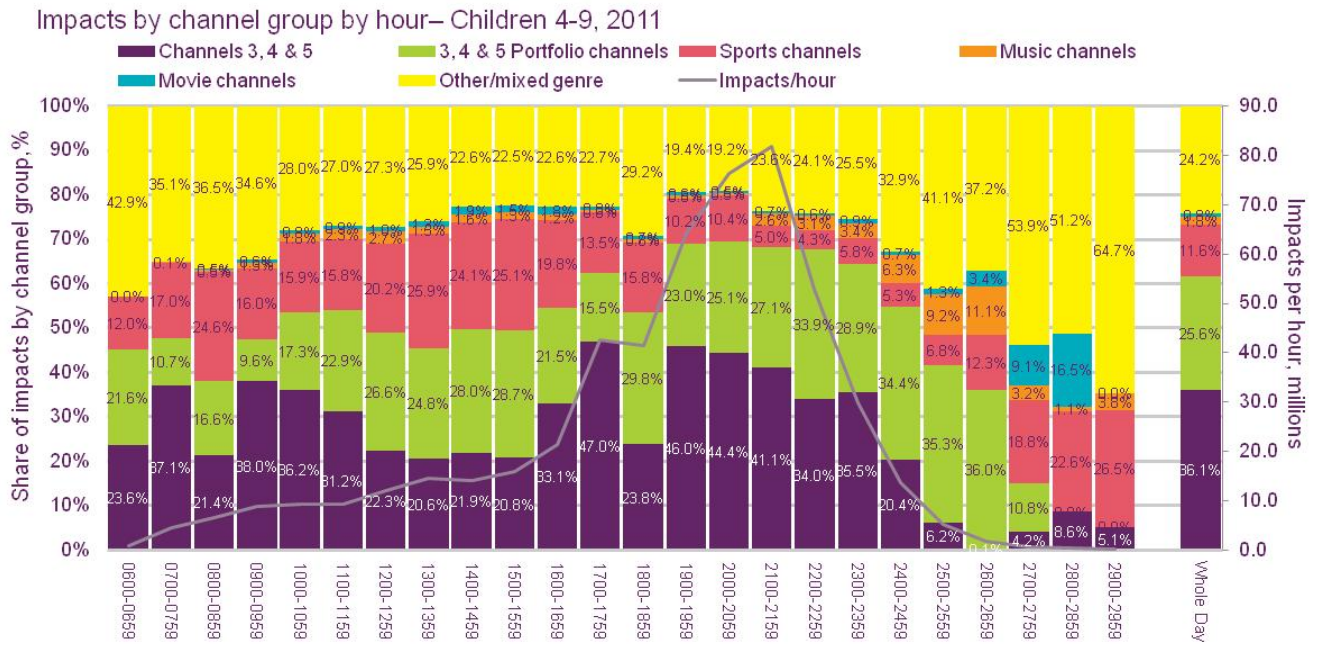
Source: BARB./Nielsen Monitor
 - New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 92: Alcohol impacts by channel group, Children 10-15



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

Figure 93: Alcohol impacts by channel group by hour- Children 4-9, 2011



Source: BARB /Nielsen Monitor

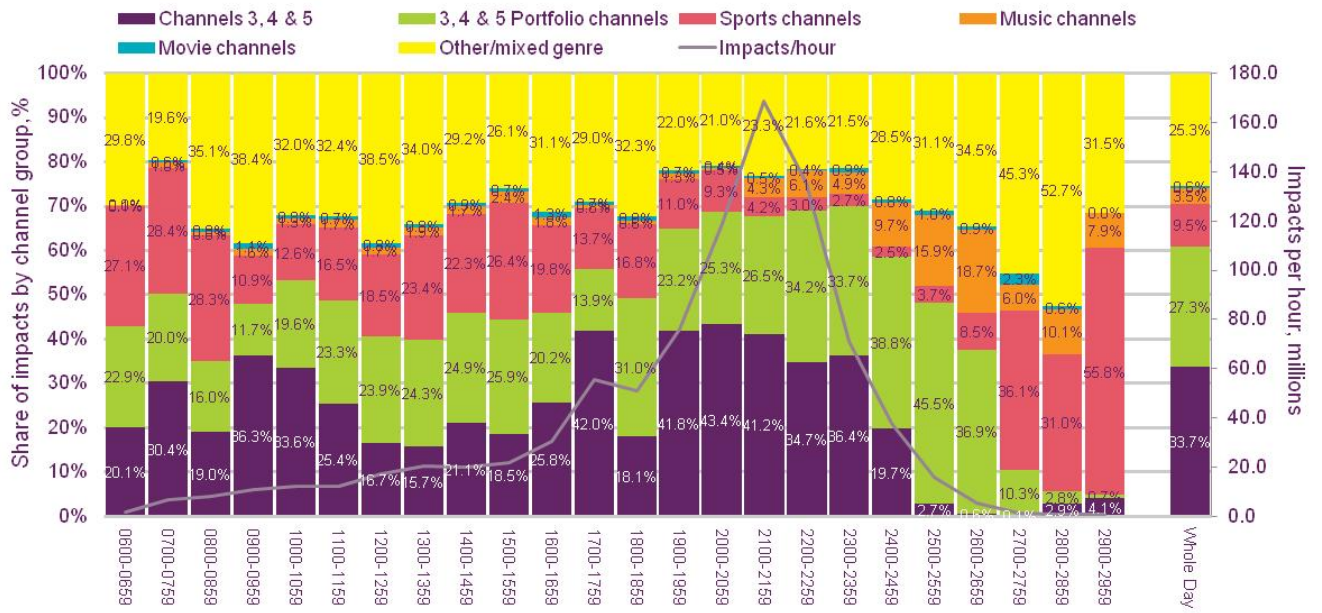
Figure 94: Alcohol impacts by channel as a share of total alcohol impacts by hour – Children 4-9, 2011

	Whole day	1700-1759	1800-1859	1900-1959	2000-2059	2100-2159	2200-2259	2300-2359
Total alcohol Impacts, millions	528.4	42.7	41.4	64.3	76.3	81.9	52.8	29.7
Channels 3, 4 and 5 (total)	36.1%	47.0%	23.8%	46.0%	44.4%	41.1%	34.0%	35.5%
ITV1	18.5%	13.9%	15.0%	40.1%	25.1%	18.0%	6.8%	11.2%
Channel 4	10.7%	25.8%	3.5%	2.6%	8.1%	13.7%	16.8%	16.3%
Five	6.9%	7.2%	5.3%	3.3%	11.2%	9.4%	10.3%	8.0%
3, 4 and 5 Portfolio (total)*	25.6%	15.5%	29.8%	23.0%	25.1%	27.1%	33.9%	28.9%
Channel 4+1	1.5%	2.0%	4.8%	0.3%	0.4%	1.0%	2.3%	3.1%
4Music	0.5%	0.0%	0.0%	0.0%	0.0%	1.3%	1.0%	1.9%
5 USA	1.3%	0.8%	0.7%	0.9%	1.2%	2.2%	3.1%	1.6%
5*	1.1%	0.3%	3.9%	1.3%	1.0%	1.1%	1.5%	0.6%
E4	2.6%	0.0%	0.0%	0.1%	8.2%	4.1%	3.2%	2.7%
E4+1	1.1%	0.0%	0.0%	0.0%	0.0%	3.5%	2.5%	2.2%
ITV2	4.5%	3.2%	3.6%	4.5%	3.5%	4.2%	7.0%	4.5%
Sports	11.6%	13.5%	15.8%	10.2%	10.4%	5.0%	4.3%	5.8%
Music*	1.8%	0.6%	0.8%	0.8%	0.5%	2.6%	3.1%	3.4%
VIVA	0.3%	0.1%	0.0%	0.0%	0.0%	0.6%	1.0%	0.4%
Movies	0.8%	0.8%	0.7%	0.6%	0.5%	0.7%	0.6%	0.9%
Other	24.2%	22.7%	29.2%	19.4%	19.2%	23.6%	24.1%	25.5%

Source: BARB/Nielsen Monitor - As a percentage of total alcohol impacts per hour

*Channel group totals shown with only select channels within each group listed which illustrate the change in impacts more markedly.

Figure 95: Alcohol impacts by channel group by hour- Children 10-15, 2011



Source: BARB /Nielsen Monitor

Figure 96: Alcohol impacts by channel as a share of total alcohol impacts by hour – Children 10-15, 2011

	Whole day	1700-1759	1800-1859	1900-1959	2000-2059	2100-2159	2200-2259	2300-2359
Total alcohol Impacts, millions	900.3	55.3	51.2	75.9	118.8	168.5	135.1	71.2
Channels 3, 4 and 5 (total)	33.7%	42.0%	18.1%	41.8%	43.4%	41.2%	34.7%	36.4%
ITV1	15.0%	12.2%	11.9%	35.5%	24.1%	17.9%	6.1%	10.2%
Channel 4	11.9%	24.4%	2.6%	3.0%	7.7%	14.4%	17.6%	19.2%
Five	6.8%	5.3%	3.5%	3.3%	11.6%	8.9%	11.0%	7.0%
3, 4 and 5 Portfolio (total)*	27.3%	13.9%	31.0%	23.2%	25.3%	26.5%	34.2%	33.7%
Channel 4+1	1.9%	1.3%	4.5%	0.4%	0.4%	1.2%	2.7%	4.7%
4Music	1.3%	0.0%	0.1%	0.0%	0.0%	2.6%	2.2%	2.5%
5 USA	1.1%	1.0%	0.7%	1.3%	1.3%	1.4%	1.5%	1.2%
5*	1.0%	0.5%	4.2%	1.3%	1.0%	1.0%	1.2%	1.3%
E4	4.5%	0.1%	0.0%	0.1%	9.7%	5.5%	6.5%	4.8%
E4+1	2.0%	0.0%	0.1%	0.0%	0.0%	3.6%	2.6%	3.8%
ITV2	4.8%	2.8%	3.9%	4.4%	3.5%	3.7%	7.8%	5.3%
Sports	9.5%	13.7%	16.8%	11.0%	9.3%	4.2%	3.0%	2.7%
Music*	3.5%	0.8%	0.8%	1.3%	0.5%	4.3%	6.1%	4.9%
VIVA	1.3%	0.1%	0.1%	0.0%	0.0%	1.4%	3.0%	1.2%
Movies	0.6%	0.7%	0.9%	0.7%	0.4%	0.5%	0.4%	0.9%
Other	25.3%	29.0%	32.3%	22.0%	21.0%	23.3%	21.6%	21.5%

Source: BARB/Nielsen Monitor - As a percentage of total alcohol impacts per hour

*Channel group totals shown with only select channels within each group listed which illustrate the change in impacts more markedly.

1.3 Comparative analysis

Figure 97: Comparative analysis: Children aged 4-9

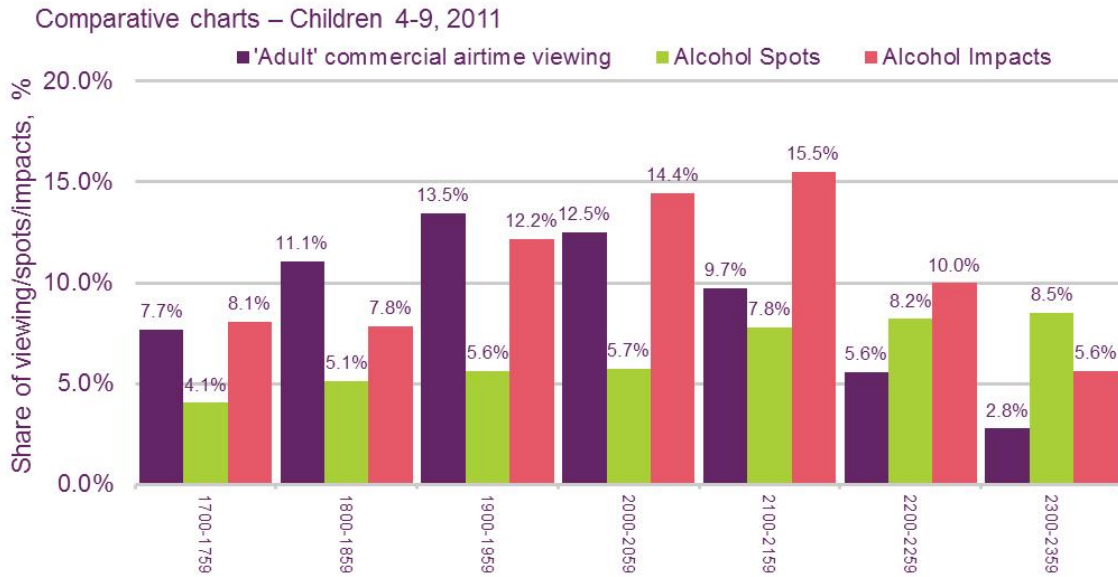
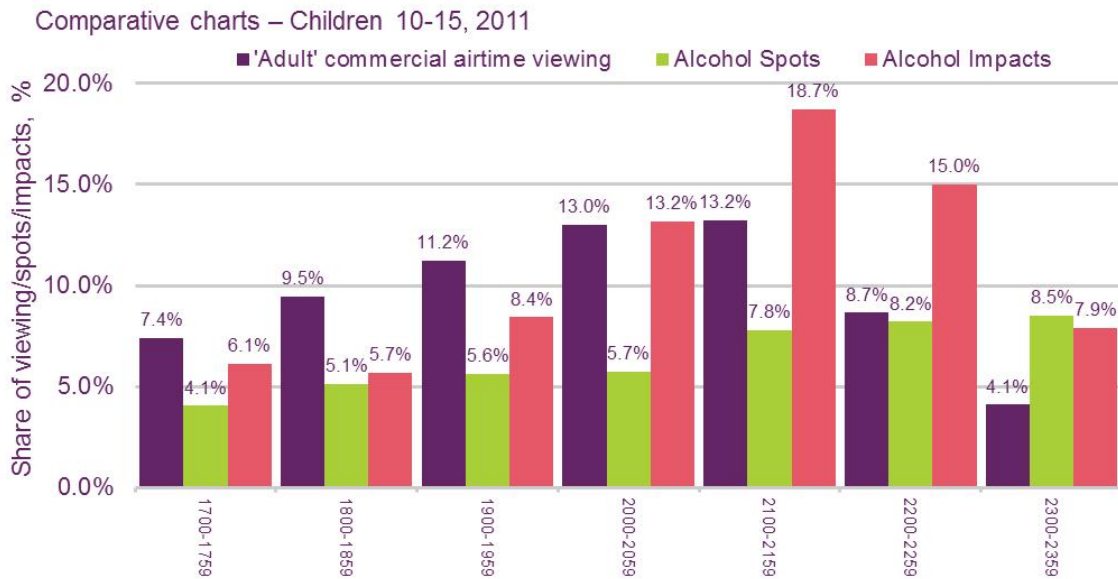


Figure 98: Comparative analysis: Children aged 10-15



Annex 2

Most watched programmes amongst child audiences

In the light of the Government's proposal that advertising should be excluded from programmes of 'high appeal' to children, Ofcom commissioned analysis of the top 50 programmes in terms of the size of the child audience, and how the programmes indexed against the reference group of children aged 10-15. The index shows when alcohol advertising would normally have been permissible (when the index is below 120), though this does not mean that such advertising was present. For example, programmes made for children, regardless of the index, would not carry alcohol advertising. The 'child profile' indicates the percentage of the audience comprised of children in the relevant age group. The data is drawn from 2011, which was the latest full year data available when the analysis was commissioned last year.

Figures 1 to 4 below list the programmes which attracted the largest audiences of children aged 4-9, 10-15, 4-15 and 16-17 year olds respectively (programmes are based on the highest occurrence only).

Figure 1: Programmes with the largest audience of 4-9 year olds

RANK	Title	Channel	Date	Start	End	Child viewers (000s)	Index of 10-15s	Child profile %
1	BRITAIN'S GOT TALENT	ITV1	07/05/2011	20:00	20:59	827	118	7.4
2	THE X FACTOR	ITV1	03/12/2011	20:00	21:29	773	91	6.8
3	THE X FACTOR RESULTS	ITV1	11/12/2011	19:29	21:29	734	102	5.5
4	I'M A CELEBRITY - GET ME OUT OF HERE!	ITV1	03/12/2011	21:31	22:31	589	121	5.4
5	FILM: HARRY POTTER AND THE GOBLET OF FIRE	ITV1	06/08/2011	18:12	20:54	545	97	9.2
6	FILM: ELF	CH4	11/12/2011	17:47	19:31	541	150	14.1
7	BRITAIN'S GOT TALENT RESULT	ITV1	04/06/2011	21:29	22:01	538	106	4.3
8	FILM: WILLY WONKA AND THE CHOCOLATE FACTORY	ITV1	18/12/2011	15:08	16:55	511	101	17.6
9	DANCING ON ICE	ITV1	09/01/2011	18:32	20:28	511	69	5.0
10	CORONATION STREET	ITV1	25/12/2011	19:59	20:59	501	61	4.8
11	FILM: ICE AGE 3: DAWN OF THE DINOSAURS	CH4	13/11/2011	17:45	19:26	479	109	10.8
12	HARRY HILL'S TV BURP	ITV1	03/12/2011	19:28	19:55	465	105	9.6
13	RED OR BLACK?	ITV1	03/09/2011	19:01	20:12	445	79	6.3
14	FILM: HARRY POTTER AND THE PRISONER OF A	ITV1	30/07/2011	17:41	20:10	425	120	10.4
15	FILM: ICE AGE 2	ITV1	11/06/2011	19:02	20:37	419	98	13.1
16	NEW YOU'VE BEEN FRAMED!	ITV1	05/02/2011	18:29	18:55	405	69	7.3
17	FILM: HARRY POTTER AND THE ORDER OF THE PHOENIX	ITV1	13/08/2011	18:27	20:54	404	113	7.2
18	ANT & DEC'S PUSH THE BUTTON	ITV1	19/03/2011	19:22	20:37	401	124	6.7
19	SING IF YOU CAN	ITV1	07/05/2011	18:59	19:56	387	125	9.2

20	EMMERDALE	ITV1	25/12/2011	18:00	18:57	383	48	5.4
21	5 NEWS	CH5	23/10/2011	18:59	19:02	362	133	13.0
22	THE CUBE	ITV1	13/11/2011	19:00	19:53	356	88	8.3
23	FILM: FINDING NEMO	CH5	17/07/2011	17:38	18:19	352	74	12.0
24	UEFA CHAMPIONS LEAGUE LIVE	ITV1	28/05/2011	18:59	22:24	352	71	4.2
25	FILM: MAMMA MIA!	ITV1	09/04/2011	19:03	21:04	341	78	5.8
26	ALL NEW YOU'VE BEEN FRAMED	ITV1	03/12/2011	19:01	19:26	340	83	8.3
27	ALL STAR FAMILY FORTUNES	ITV1	25/12/2011	19:00	19:56	337	49	5.3
28	THE SIMPSONS	CH4	07/11/2011	18:00	18:25	335	137	16.4
29	FIVE NEWS	CH5	23/01/2011	16:44	16:47	332	68	14.5
30	FILM: TOY STORY 2	CH5	23/10/2011	19:03	19:57	331	146	13.0
31	FILM: HARRY POTTER AND THE CHAMBER OF SECRETS	ITV1	23/07/2011	17:24	20:13	327	101	8.5
32	PRIMEVAL	ITV1	01/01/2011	19:33	20:32	316	125	5.9
33	FILM: DISNEY'S ALADDIN	CH5	23/01/2011	16:47	17:24	313	71	12.0
34	FILM: TOY STORY	CH5	16/10/2011	17:36	18:15	311	123	12.4
35	POPSTAR TO OPERASTAR: THE CURTAIN RAISER	ITV1	04/06/2011	20:58	21:25	301	73	4.7
36	YOU'VE BEEN FRAMED AT CHRISTMAS!	ITV1	24/12/2011	18:01	18:26	298	89	6.4
37	FILM: THE POLAR EXPRESS	ITV1	24/12/2011	13:48	15:30	296	82	13.5
38	FILM: MR BEANS HOLIDAY	ITV1	27/03/2011	18:04	19:36	295	125	9.3
39	THE ROYAL WEDDING	ITV1	29/04/2011	08:25	16:00	287	80	6.5
40	PENN & TELLER: FOOL US	ITV1	18/06/2011	20:00	20:57	286	91	6.5
41	BENIDORM	ITV1	04/03/2011	21:00	21:59	283	78	3.7
42	FILM: THE MASK	CH5	13/03/2011	19:01	19:58	282	124	14.7
43	FILM: IRON MAN	CH4	02/01/2011	17:41	19:53	279	83	8.2
44	FA CUP	ITV1	09/01/2011	13:02	15:55	273	54	4.6
45	FILM: DISNEY'S POCAHONTAS	CH5	13/02/2011	18:00	18:50	272	103	16.4
46	ENGLAND FRIENDLIES	ITV1	12/11/2011	16:44	19:18	267	58	4.2
47	FILM: MRS DOUBTFIRE	CH5	25/09/2011	17:06	18:23	266	98	12.3
48	FILM: THE GOONIES	CH5	02/10/2011	17:47	18:56	265	96	11.6
49	FILM: HARRY POTTER AND THE PHILOSOPHER'S STONE	ITV1	16/07/2011	16:33	19:14	264	103	7.2
50	WILD AT HEART	ITV1	09/01/2011	20:34	21:31	262	77	3.0

Figure 2: Programmes with the largest audience of 10-15 year olds

RANK	Title	Channel	Date	Start	End	Child viewers (000s)	Index of 10-15s	Child profile %
1	BRITAIN'S GOT TALENT	ITV1	16/04/2011	20:20	21:49	1,081	133	10.0
2	I'M A CELEBRITY - GET ME OUT OF HERE!	ITV1	13/11/2011	21:02	22:31	1,054	113	8.5
3	THE X FACTOR RESULTS	ITV1	11/12/2011	19:29	21:29	1,029	102	7.6

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4	BRITAIN'S GOT TALENT RESULT	ITV1	04/06/2011	21:29	22:01	1,004	106	8.0
5	THE X FACTOR	ITV1	10/09/2011	20:15	21:15	999	111	8.3
6	TAKE ME OUT	ITV1	29/01/2011	20:21	21:30	636	179	13.5
7	CORONATION STREET	ITV1	30/05/2011	20:59	21:26	629	73	5.5
8	RED OR BLACK?	ITV1	03/09/2011	21:20	21:44	570	101	7.6
9	ANT & DEC'S PUSH THE BUTTON	ITV1	19/03/2011	19:22	20:37	553	124	9.3
10	DANCING ON ICE	ITV1	09/01/2011	18:32	20:28	530	69	5.2
11	BIG FAT GYPSY WEDDINGS	CH4	01/02/2011	21:00	22:00	520	86	6.5
12	THE BRIT AWARDS 2011	ITV1	15/02/2011	19:58	22:00	517	133	10.0
13	WILD AT HEART	ITV1	09/01/2011	20:34	21:31	502	77	5.8
14	PRIMEVAL	ITV1	01/01/2011	19:33	20:32	502	125	9.4
15	HARRY HILL'S TV BURP	ITV1	12/02/2011	18:52	19:19	492	105	7.9
16	BENIDORM	ITV1	25/02/2011	21:00	21:58	487	79	5.9
17	FILM: HARRY POTTER AND THE ORDER OF THE PHOENIX	ITV1	13/08/2011	18:27	20:54	474	113	8.5
18	UEFA CHAMPIONS LEAGUE LIVE	ITV1	28/05/2011	18:59	22:24	463	74	5.6
19	CELEBRITY BIG BROTHER	CH5	18/08/2011	21:02	22:27	439	105	7.9
20	FILM: ELF	CH4	11/12/2011	17:47	19:31	431	150	11.3
21	FILM: HARRY POTTER AND THE GOBLET OF FIRE	ITV1	06/08/2011	18:12	20:54	430	97	7.3
22	SING IF YOU CAN	ITV1	16/04/2011	19:23	20:16	427	104	7.8
23	THE NATIONAL TELEVISION AWARDS 2011	ITV1	26/01/2011	19:30	22:02	402	78	5.8
24	THE CUBE	ITV1	24/12/2011	18:29	19:22	401	102	7.6
25	DOC MARTIN	ITV1	24/10/2011	20:59	21:58	391	50	3.7
26	GLEE	E4	10/01/2011	21:01	22:00	382	205	15.4
27	EMMERDALE	ITV1	27/10/2011	20:00	20:26	370	65	4.9
28	MY BIG FAT GYPSY CHRISTMAS	CH4	13/12/2011	21:00	21:59	370	77	5.8
29	FILM: HARRY POTTER AND THE PRISONER OF A	ITV1	30/07/2011	17:41	20:10	368	120	9.0
30	FILM: ICE AGE 3: DAWN OF THE DINOSAUR	CH4	13/11/2011	17:45	19:26	365	109	8.2
31	THE SIMPSONS	CH4	19/01/2011	18:01	18:27	364	263	19.7

32	DOWNTON ABBEY	ITV1	25/12/2011	21:01	22:59	355	41	3.1
33	POPSTAR TO OPERASTAR: THE CURTAIN RAISER	ITV1	04/06/2011	20:58	21:25	353	73	5.5
34	DANCING ON ICE - THE SKATE OFF	ITV1	09/01/2011	21:32	22:12	348	57	4.3
35	FILM: MAMMA MIA!	ITV1	09/04/2011	19:03	21:04	344	78	5.9
36	EURO 2012 QUALIFIER: ENGLAND V BULGARIA	ITV1	06/09/2011	19:00	21:57	339	67	6.0
37	ALL STAR FAMILY FORTUNES	ITV1	17/09/2011	18:59	19:55	323	80	6.0
38	THE JONATHAN ROSS SHOW	ITV1	08/10/2011	22:04	22:59	323	93	7.0
39	SUPER TINY ANIMALS	ITV1	30/11/2011	19:32	20:26	319	84	6.3
40	ENGLAND FRIENDLIES	ITV1	29/03/2011	19:29	22:10	317	69	5.2
41	FA CUP	ITV1	16/04/2011	16:40	19:22	317	66	5.0
42	MARCHLANDS	ITV1	24/02/2011	21:03	22:01	315	62	4.6
43	FILM: ST TRINIANS	CH4	27/11/2011	17:27	19:18	313	130	9.8
44	CUTTING EDGE: MY BIG FAT ROYAL GYPSY WEDDING	CH4	28/04/2011	21:01	22:00	309	90	6.8
45	YOU'VE BEEN FRAMED AT CHRISTMAS!	ITV1	24/12/2011	18:01	18:26	308	89	6.7
46	NEW YOU'VE BEEN FRAMED!	ITV1	12/11/2011	19:19	19:43	307	90	6.7
47	A NIGHT WITH BEYONCE	ITV1	04/12/2011	21:02	22:11	306	92	6.9
48	PENN & TELLER: FOOL US	ITV1	23/07/2011	21:01	21:59	304	102	7.7
49	PIERS MORGAN'S LIFE STORIES	ITV1	10/12/2011	22:05	22:59	299	84	6.3
50	FILM: MR BEANS HOLIDAY	ITV1	27/03/2011	18:04	19:36	298	125	9.4

Figure 3: Programmes with the largest audience of 4-15 year olds

RANK	Title	Channel	Date	Start	End	Child viewers (000s)	Index of 10-15s	Child profile %
1	BRITAIN'S GOT TALENT	ITV1	07/05/2011	20:00	20:59	1,820	118	16.2
2	THE X FACTOR RESULTS	ITV1	11/12/2011	19:29	21:29	1,762	102	13.1
3	THE X FACTOR	ITV1	10/09/2011	20:15	21:15	1,757	111	14.6
4	I'M A CELEBRITY - GET ME OUT OF HERE!	ITV1	03/12/2011	21:31	22:31	1,572	121	14.5
5	BRITAIN'S GOT TALENT RESULT	ITV1	04/06/2011	21:29	22:01	1,542	106	12.2

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6	DANCING ON ICE	ITV1	09/01/2011	18:32	20:28	1,042	69	10.2
7	CORONATION STREET	ITV1	30/05/2011	20:59	21:26	1,017	73	8.8
8	FILM: HARRY POTTER AND THE GOBLET OF FIRE	ITV1	06/08/2011	18:12	20:54	975	97	16.5
9	FILM: ELF	CH4	11/12/2011	17:47	19:31	972	150	25.4
10	RED OR BLACK?	ITV1	03/09/2011	21:20	21:44	971	101	12.9
11	ANT & DEC'S PUSH THE BUTTON	ITV1	19/03/2011	19:22	20:37	955	124	16.0
12	TAKE ME OUT	ITV1	05/03/2011	20:28	21:37	929	146	16.9
13	FILM: HARRY POTTER AND THE ORDER OF THE PHOENIX	ITV1	13/08/2011	18:27	20:54	878	113	15.7
14	HARRY HILL'S TV BURP	ITV1	12/02/2011	18:52	19:19	867	105	13.9
15	FILM: ICE AGE 3: DAWN OF THE DINOSAUR	CH4	13/11/2011	17:45	19:26	845	109	19.0
16	PRIMEVAL	ITV1	01/01/2011	19:33	20:32	818	125	15.3
17	UEFA CHAMPIONS LEAGUE LIVE	ITV1	28/05/2011	18:59	22:24	814	74	9.8
18	FILM: HARRY POTTER AND THE PRISONER OF AZKABAN	ITV1	30/07/2011	17:41	20:10	793	120	19.4
19	SING IF YOU CAN	ITV1	07/05/2011	18:59	19:56	782	125	18.6
20	WILD AT HEART	ITV1	09/01/2011	20:34	21:31	765	77	8.8
21	BENIDORM	ITV1	25/02/2011	21:00	21:58	747	79	9.1
22	FILM: WILLY WONKA AND THE CHOCOLATE FACT	ITV1	18/12/2011	15:08	16:55	732	101	25.3
23	EMMERDALE	ITV1	17/02/2011	19:59	20:25	710	51	7.6
24	THE CUBE	ITV1	24/12/2011	18:29	19:22	698	102	13.3
25	NEW YOU'VE BEEN FRAMED!	ITV1	05/02/2011	18:29	18:55	693	69	12.5
26	FILM: MAMMA MIA!	ITV1	09/04/2011	19:03	21:04	684	78	11.7
27	THE BRIT AWARDS 2011	ITV1	15/02/2011	19:58	22:00	662	133	12.8
28	BIG FAT GYPSY WEDDINGS	CH4	08/02/2011	21:00	21:59	661	69	7.5
29	FILM: ICE AGE 2	ITV1	11/06/2011	19:02	20:37	654	98	20.4
30	POPSTAR TO OPERASTAR: THE CURTAIN RAISER	ITV1	04/06/2011	20:58	21:25	653	73	10.1
31	5 NEWS	CH5	23/10/2011	18:59	19:02	633	133	22.9
32	CELEBRITY BIG BROTHER	CH5	18/08/2011	21:02	22:27	626	105	11.2
33	FILM: TOY STORY 2	CH5	23/10/2011	19:03	19:57	620	146	23.4
34	FILM: HARRY POTTER AND THE CHAMBER OF SECRETS	ITV1	23/07/2011	17:24	20:13	618	101	16.0
35	YOU'VE BEEN FRAMED AT CHRISTMAS!	ITV1	24/12/2011	18:01	18:26	606	89	13.1
36	DOC MARTIN	ITV1	24/10/2011	20:59	21:58	599	50	5.7
37	THE SIMPSONS	CH4	14/11/2011	18:00	18:25	598	162	27.0
38	ALL NEW YOU'VE BEEN FRAMED	ITV1	03/12/2011	19:01	19:26	595	83	27.0
39	FILM: MR BEANS HOLIDAY	ITV1	27/03/2011	18:04	19:36	593	125	18.7
40	ALL STAR FAMILY FORTUNES	ITV1	20/08/2011	19:00	19:55	591	71	10.1
41	THE NATIONAL TELEVISION AWARDS 2011	ITV1	26/01/2011	19:30	22:02	590	78	8.6
42	PENN & TELLER: FOOL US	ITV1	18/06/2011	20:00	20:57	584	91	13.4
43	SUPER TINY ANIMALS	ITV1	30/11/2011	19:32	20:26	554	84	11.0
44	THE ROYAL WEDDING	ITV1	29/04/2011	08:25	16:00	552	80	12.5
45	FILM: HARRY POTTER AND THE PHILOSOPHER'S STONE	ITV1	16/07/2011	16:33	19:14	547	103	14.9

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46	MY BIG FAT GYPSY CHRISTMAS	CH4	13/12/2011	21:00	21:59	545	77	8.6
47	ENGLAND FRIENDLIES	ITV1	12/11/2011	16:44	19:18	543	58	8.5
48	FA CUP	ITV1	16/04/2011	16:40	19:22	540	66	8.5
49	FILM: NIGHT AT THE MUSEUM 2	CH4	16/10/2011	18:01	19:59	535	132	18.6
50	FILM: TOY STORY	CH5	16/10/2011	17:36	18:15	532	123	21.7

Figure 4: Programmes with the largest audience of 16-17 year olds

RANK	Title	Channel	Date	Start	End	viewers (000s)	Index of 10-15s	16-17 profile
1	THE X FACTOR RESULTS	ITV1	13/11/2011	19:58	20:58	321	95	2.4
2	I'M A CELEBRITY - GET ME OUT OF HERE!	ITV1	13/11/2011	21:02	22:31	298	113	2.4
3	THE X FACTOR	ITV1	02/10/2011	19:43	20:57	297	98	2.3
4	BRITAIN'S GOT TALENT	ITV1	16/04/2011	20:20	21:49	288	133	2.7
5	BRITAIN'S GOT TALENT RESULT	ITV1	04/06/2011	21:29	22:01	269	106	2.2
6	CORONATION STREET	ITV1	07/03/2011	20:29	20:56	209	57	1.9
7	TAKE ME OUT	ITV1	29/01/2011	20:21	21:30	199	179	4.2
8	GLEE	E4	07/03/2011	21:01	21:58	183	217	8.3
9	MY BIG FAT GYPSY CHRISTMAS	CH4	13/12/2011	21:00	21:59	172	77	2.7
10	BENIDORM	ITV1	04/03/2011	21:00	21:59	170	78	2.2
11	BIG FAT QUIZ OF THE YEAR 2010	CH4	03/01/2011	21:30	23:30	169	59	5.1
12	BIG FAT GYPSY WEDDINGS	CH4	08/02/2011	21:00	21:59	158	69	1.8
13	CELEBRITY BIG BROTHER	CH5	18/08/2011	21:02	22:27	146	105	2.6
14	DOWNTON ABBEY	ITV1	25/12/2011	21:01	22:59	142	41	1.3
15	FILM: ELF	CH4	11/12/2011	17:47	19:31	140	150	3.7
16	THIS IS ENGLAND '88	CH4	13/12/2011	22:03	23:04	139	50	4.6
17	DANCING ON ICE	ITV1	09/01/2011	18:32	20:28	138	69	1.4
18	SING IF YOU CAN	ITV1	16/04/2011	19:23	20:16	136	104	2.5
19	ANT & DEC'S PUSH THE BUTTON	ITV1	12/02/2011	19:22	20:33	135	113	2.2
20	RED OR BLACK?	ITV1	03/09/2011	21:20	21:44	133	101	1.8
21	THE NATIONAL TELEVISION AWARDS 2011	ITV1	26/01/2011	19:30	22:02	131	78	2.0
22	MISFITS	E4	20/11/2011	22:02	23:04	129	144	11.3
23	WILD AT HEART	ITV1	30/01/2011	20:30	21:29	129	83	1.7
24	UEFA CHAMPIONS LEAGUE LIVE	ITV1	28/05/2011	18:59	22:24	128	74	1.6
25	EMMERDALE	ITV1	08/12/2011	20:00	20:26	126	47	1.4
26	CUTTING EDGE: MY BIG FAT ROYAL GYPSY WED	CH4	28/04/2011	21:01	22:00	124	90	2.7
27	FILM: HARRY POTTER AND THE ORDER OF THE PHOENIX	ITV1	13/08/2011	18:27	20:54	123	113	2.2
28	FA CUP	ITV1	12/03/2011	16:46	19:23	122	58	2.1
29	THE BIG FAT QUIZ OF THE YEAR	CH4	27/12/2011	21:00	23:01	122	68	3.1
30	A NIGHT WITH BEYONCE	ITV1	04/12/2011	21:02	22:11	121	92	2.6
31	PENN AND TELLER	ITV1	07/01/2011	21:02	22:25	118	76	2.6
32	DOC MARTIN	ITV1	26/09/2011	21:00	21:58	115	37	1.2
33	SKINS	E4	27/01/2011	22:00	23:02	115	156	11.1
34	THE CUBE	ITV1	24/12/2011	18:29	19:22	114	102	2.2
35	SHAMELESS	CH4	12/01/2011	22:03	23:03	114	61	3.2
36	POPSTAR TO OPERASTAR: THE CURTAIN RAISER	ITV1	04/06/2011	20:58	21:25	114	73	1.8
37	FILM: FOUR LIONS	CH4	04/09/2011	21:03	22:59	111	86	5.0
38	PRIMEVAL	ITV1	01/01/2011	19:33	20:32	110	125	2.1
39	CELEBRITY JUICE	ITV2	27/10/2011	22:01	22:45	110	104	4.1

Children's and young people's exposure to alcohol advertising

40	THE SIMPSONS	CH4	25/10/2011	18:02	18:26	109	147	6.1
41	THE ROYAL VARIETY PERFORMANCE	ITV1	14/12/2011	19:29	22:06	106	48	1.5
42	THE ONLY WAY IS ESSEX	ITV2	05/10/2011	22:00	22:44	106	81	10.6
43	DANCING ON ICE - THE SKATE OFF	ITV1	09/01/2011	21:32	22:12	105	57	1.3
44	CHANNEL 4'S COMEDY GALA	CH4	10/06/2011	21:01	23:38	104	64	3.5
45	FILM: ICE AGE 3: DAWN OF THE DINOSAUR	CH4	13/11/2011	17:45	19:26	104	109	2.3
46	HARRY HILL'S TV BURP	ITV1	12/02/2011	18:52	19:19	104	105	1.7
47	STRANGWAYS	ITV1	23/05/2011	21:00	21:57	103	59	1.7
48	THE JONATHAN ROSS SHOW	ITV1	08/10/2011	22:04	22:59	101	93	2.2
49	FILM: IRON MAN	CH4	02/01/2011	17:41	19:53	100	83	2.9
50	FILM: ST TRINIANS	CH4	27/11/2011	17:27	19:18	99	130	3.1