

Children's analysis

PSB Annual Report
December 2014

Ofcom's duties

- Ofcom is required to consider whether the PSB services, taken together, include what appears to Ofcom to be “a suitable quantity and range of high quality and original programmes for children and young people.” (s264(6)(h)).
- The Communications Act provides that Ofcom is no longer responsible for ensuring that an individual commercial PSB fulfils a set number of hours of children’s programming.
- It is for PSBs themselves to decide what to deliver in terms of children’s programming, as well as other programme types such as arts programmes: the so-called ‘Tier 3 genres’.

Notes on the data

PSB channels

- ITV includes GMTV unless otherwise stated. Data for S4C is shown in a separate section, apart from S4C's children's output which is included within the children's section of the report.
- GMTV became Daybreak during 2010; the data relating to both services are labelled as 'ITV Breakfast' throughout this pack.

Spend data

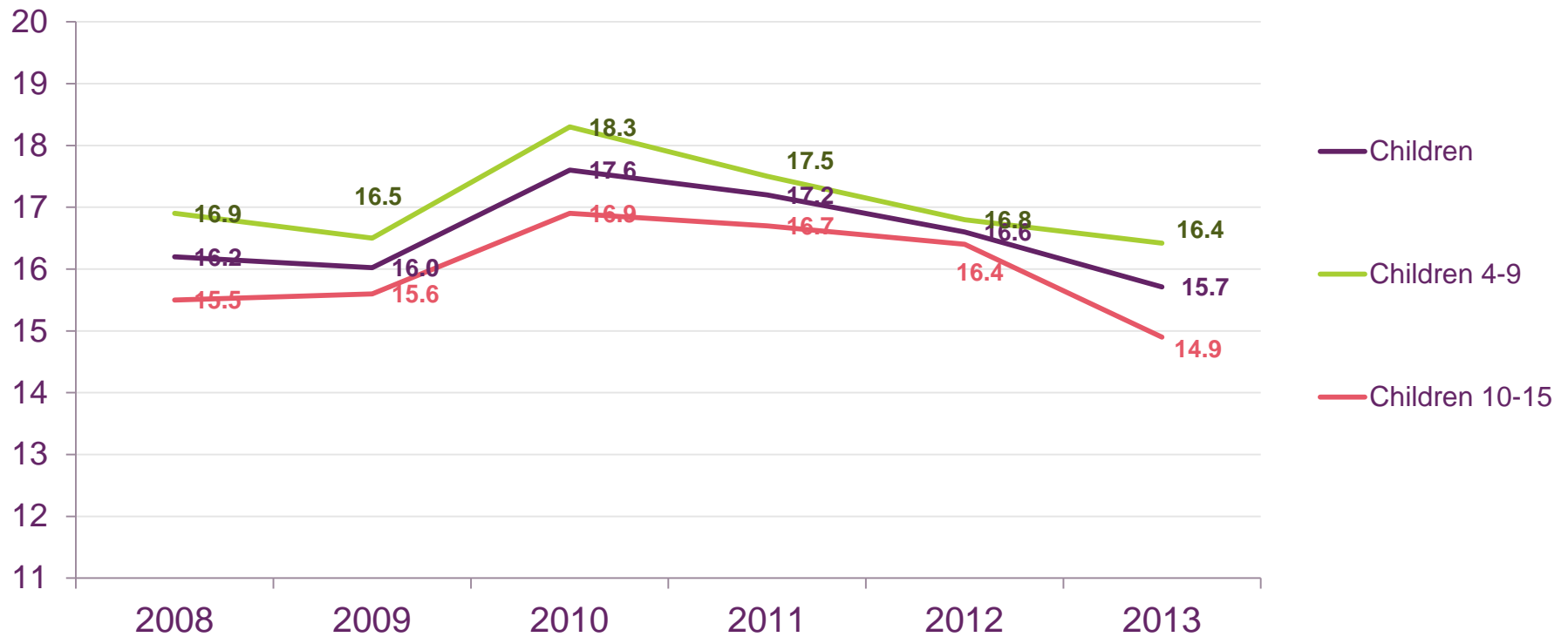
- Programme spend represents the total cost of production or acquisition, including rights costs but excluding third party investment. In the case of commissions, it represents the price paid to the independent producer (and therefore includes a mark-up on production costs).
- Trend data showing programme costs over a number of years is given in 2013 prices (i.e. taking account of inflation, using the Consumer Price Index).

Definition of 'slot time' vs. 'running time'

- Output hours are either based on slot time or running time. Slot time includes advertisements, sponsorship breaks and promos whereas running time excludes these minutes from programme output hours analysis. It is stated beneath each chart in this annex whether slot time or running time is used in the analysis.

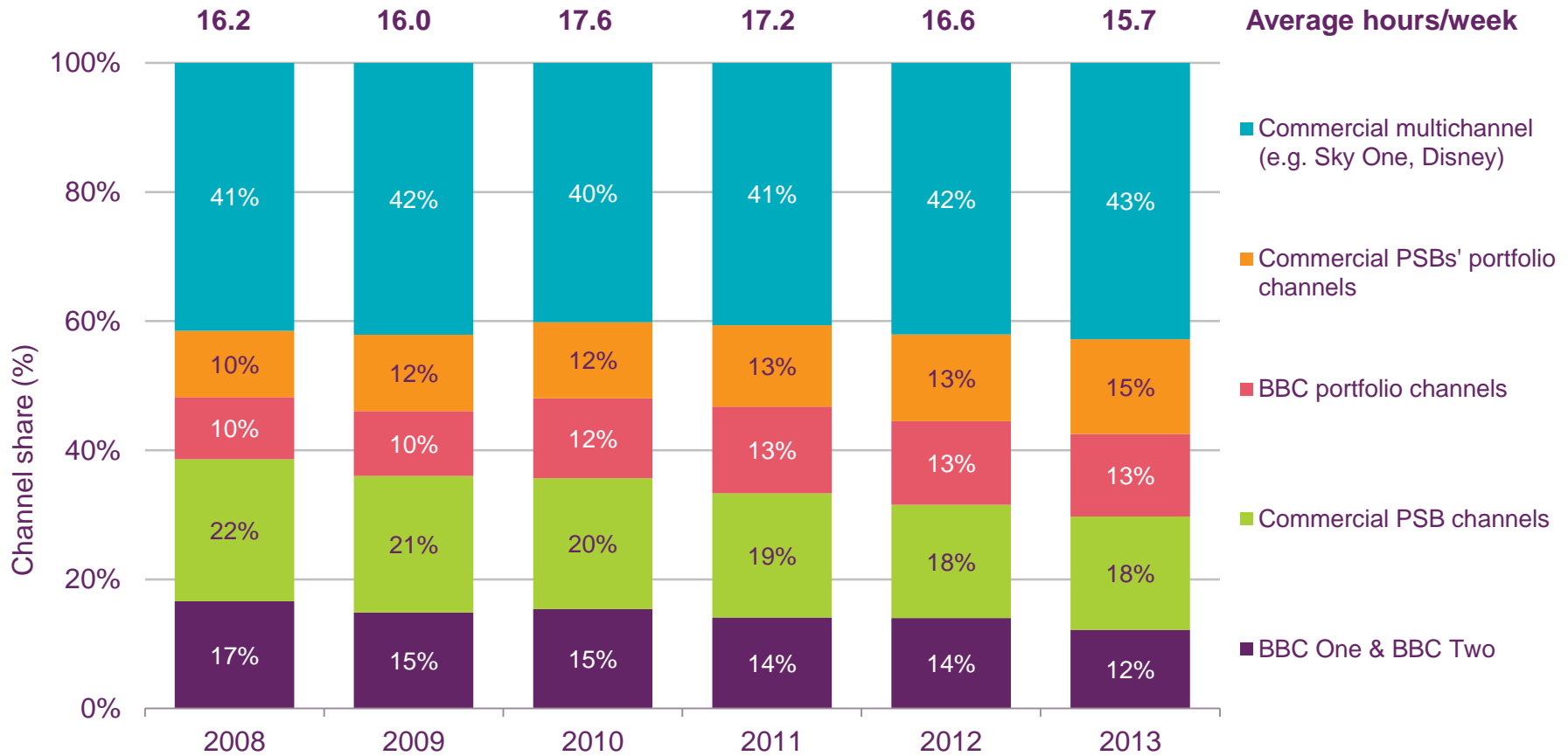
Average hours of weekly viewing, by age

Average weekly viewing (hrs, mins)



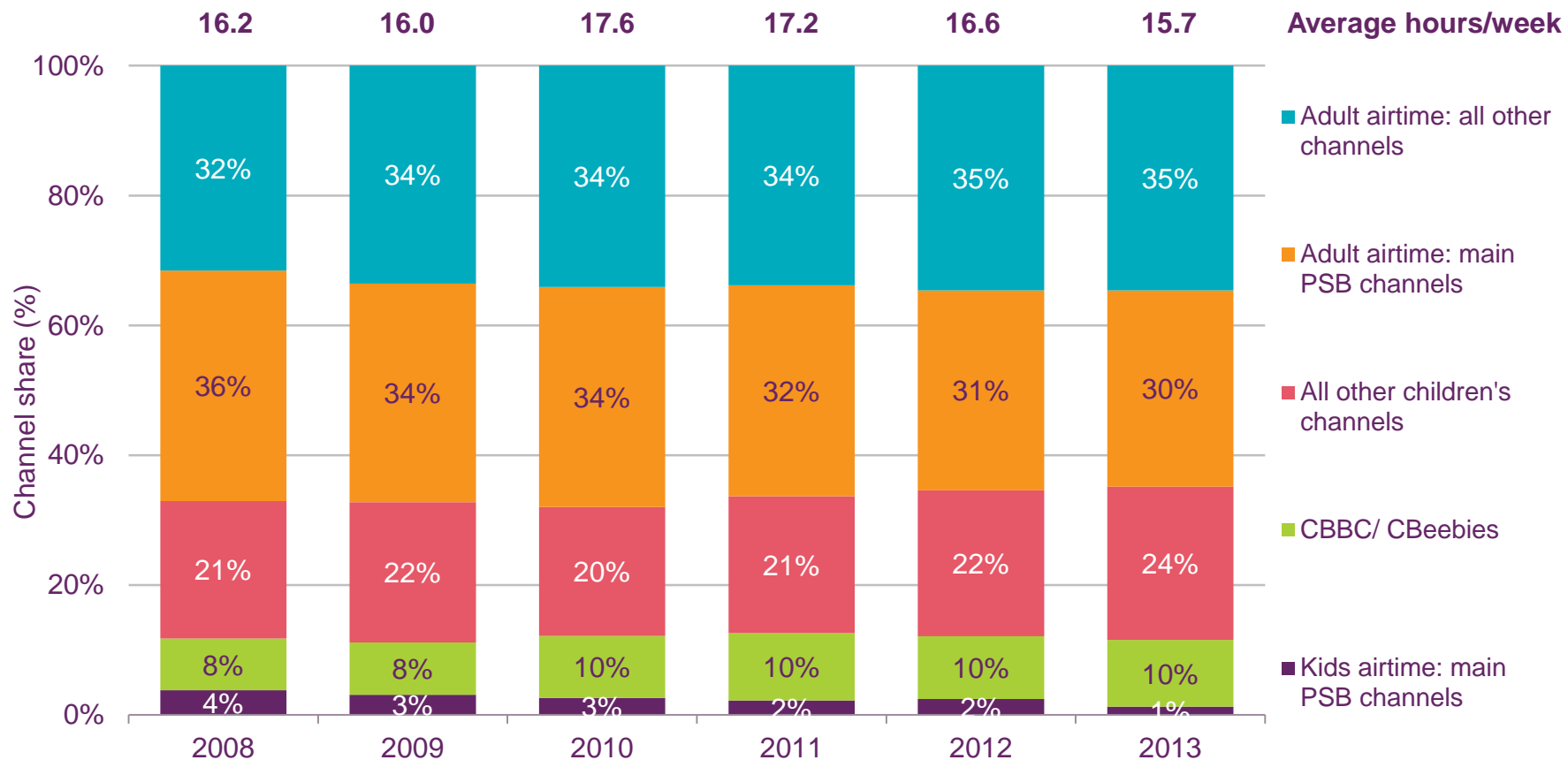
Source: BARB, 2008-2013.

Children's total weekly viewing, by channel type – Children 4-15: 2008-2013



Source: BARB, Children 4-15, Network.

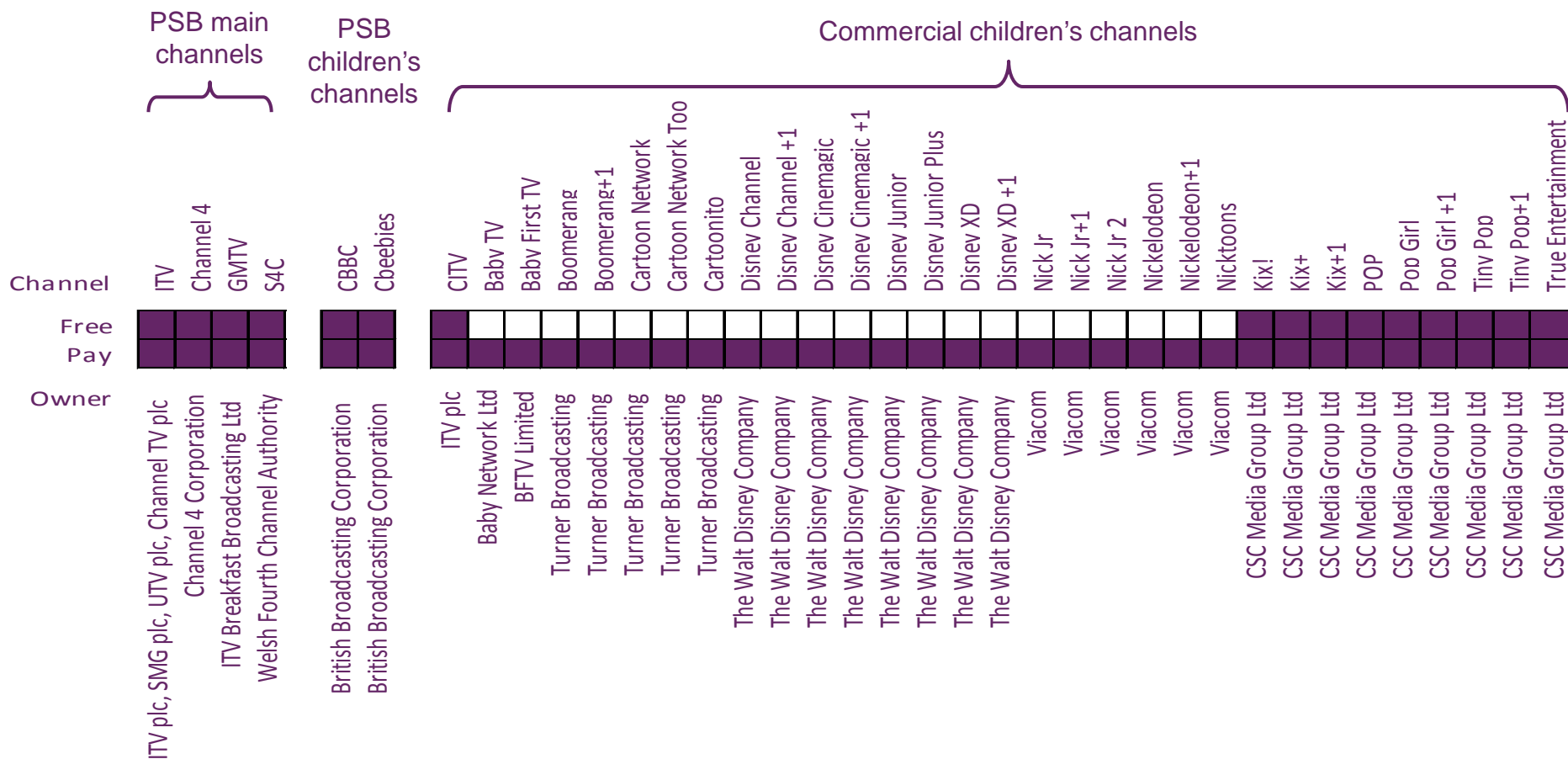
Children's total weekly viewing in 'adult' and children's airtime, children 4-15: 2008-2013



Source: BARB, Children 4-15, Network.

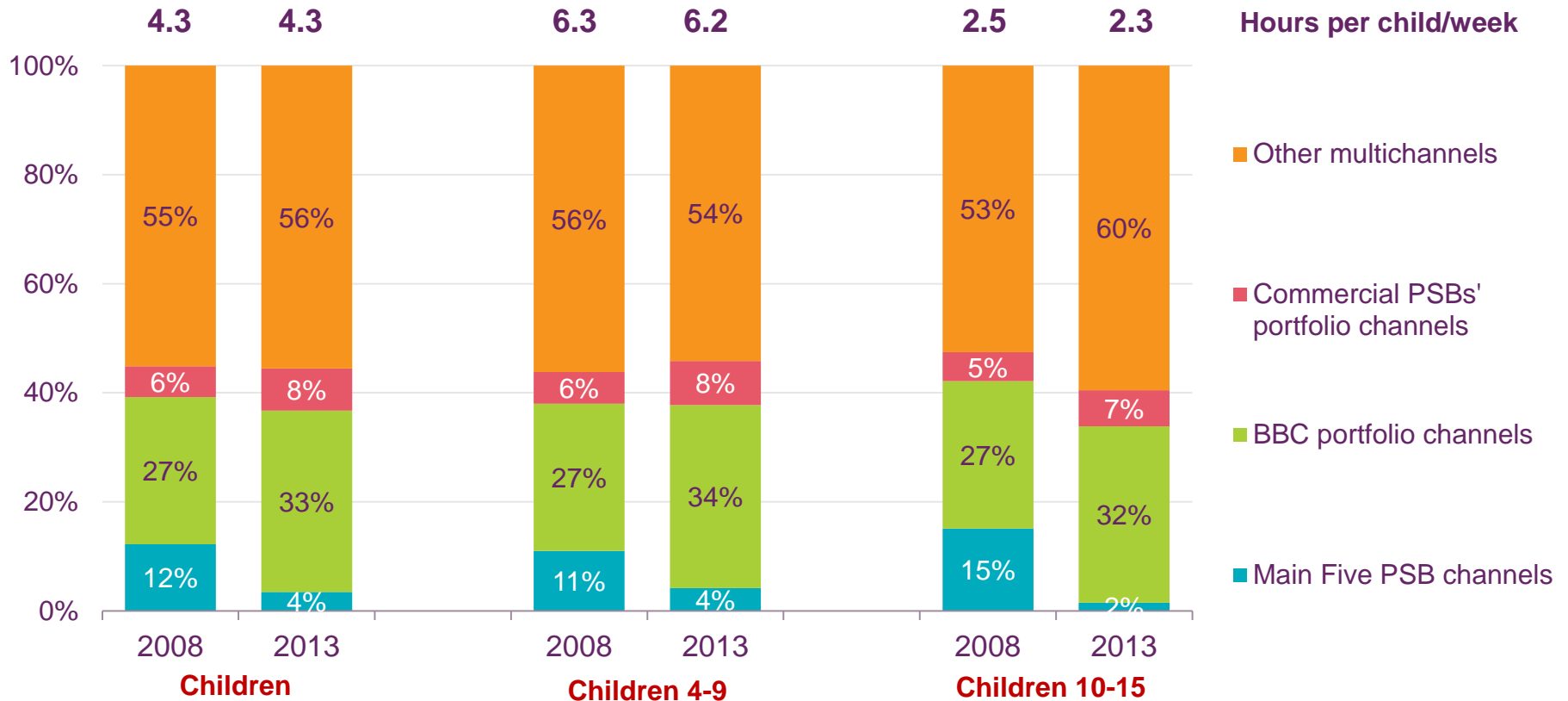
Children's airtime slots taken to calculate 'Children's airtime – Main five PSB channels' vary from year to year and may vary throughout a specific year, therefore approximations have been taken.

Dedicated children's channels, by platform: 2013



Source: BARB 2013/Ofcom broadcaster returns. Reflects channels that were transmitting/part-transmitting during 2013.

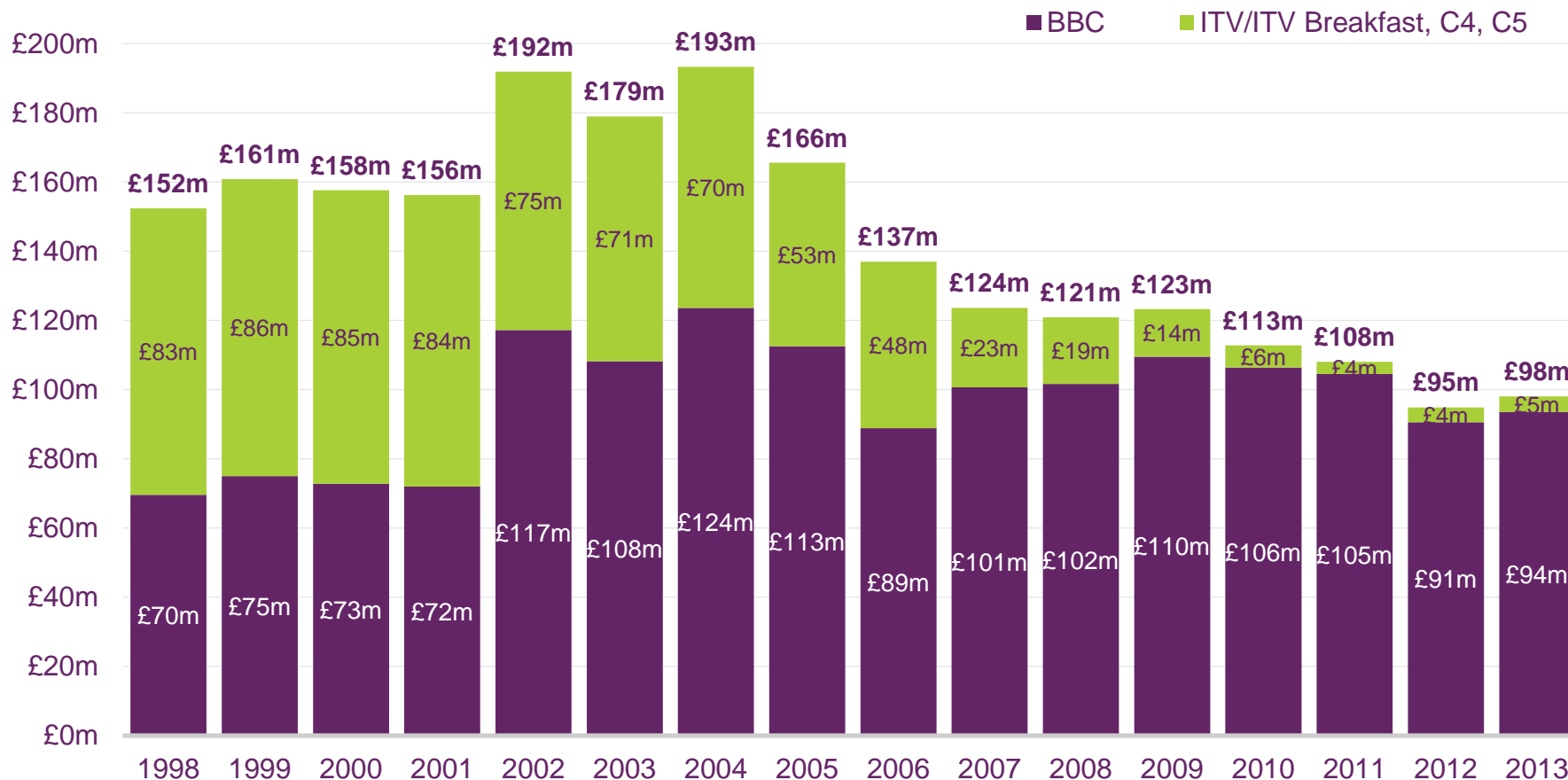
Share of viewing to the children's genre, by channel group: 2008 vs. 2013



Source: BARB. Children 4-15, 2008-2009: Network Plus/2010+: Network. Network programming based on 4+ area filter. Based on total minutes of viewing to the genre.

PSB spend, children's genre, all hours: 1998-2013

Launch of CBBC
and CBeebies



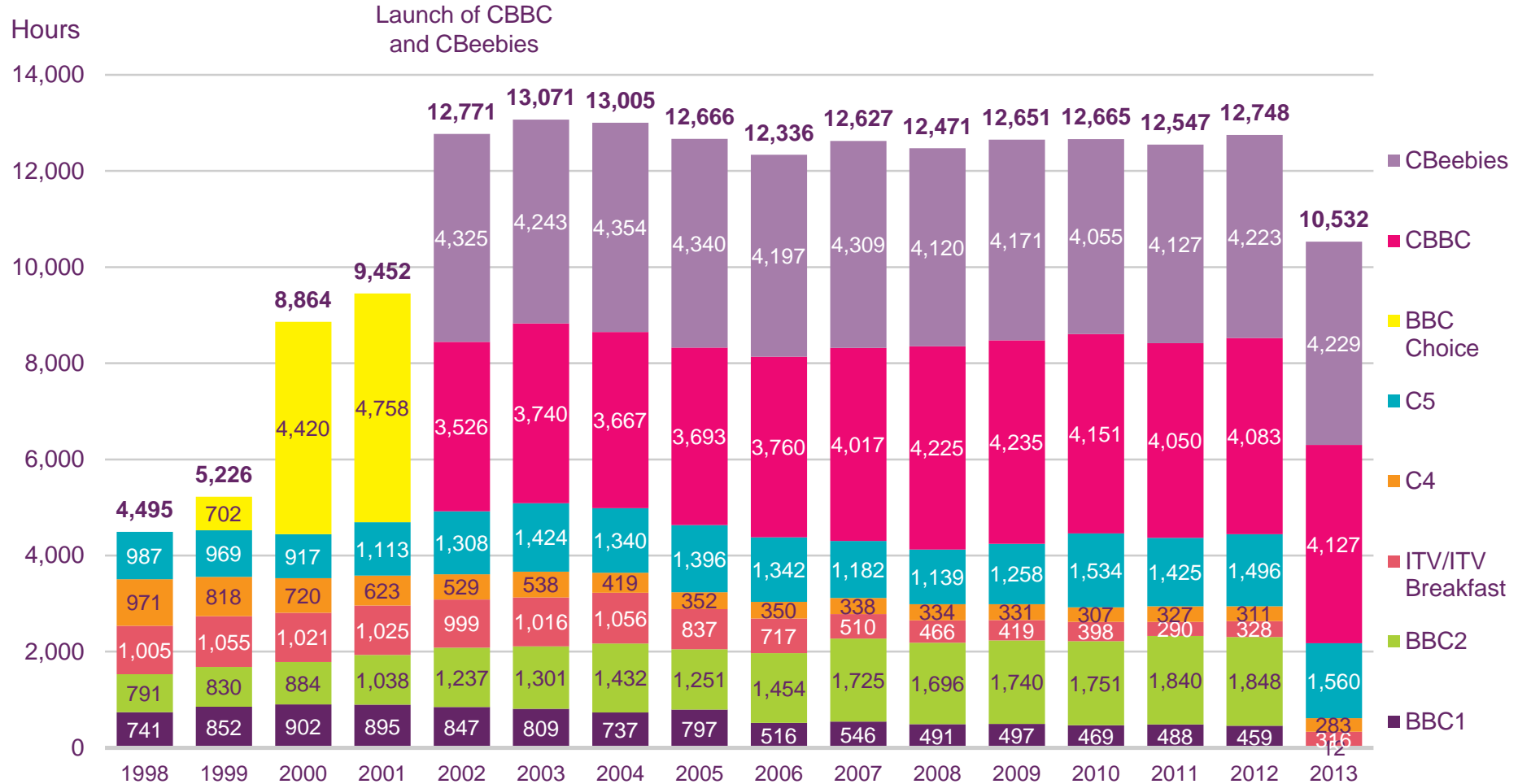
Source: Ofcom/broadcasters. Note: figures are expressed in 2013 prices. ITV includes ITV Breakfast. BBC channels do not include BBC HD. CITV is excluded.

PSB spend, children's genre, first-run hours: 1998-2013



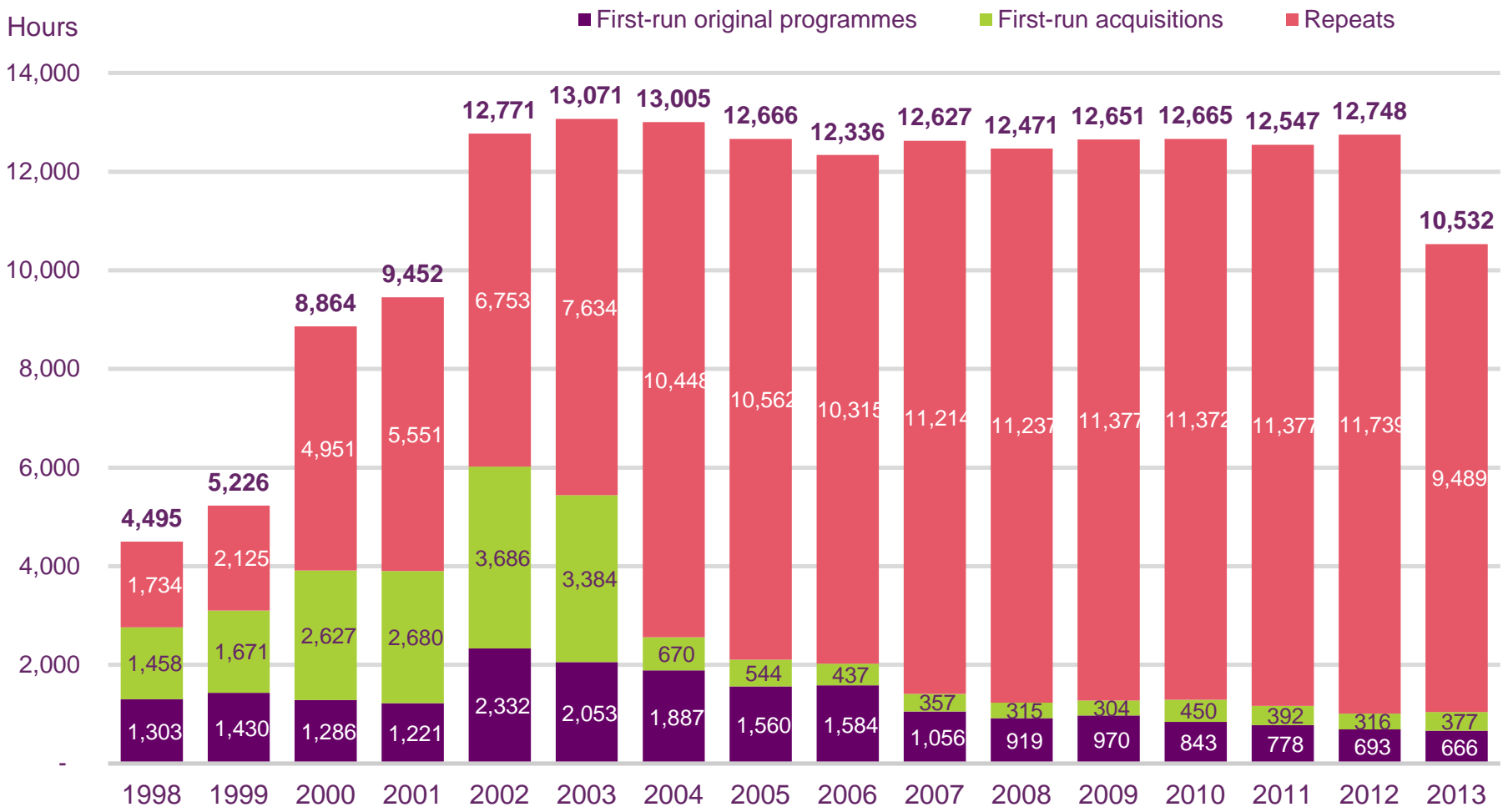
Source: Ofcom/broadcasters. Note: figures are expressed in 2013 prices. ITV includes ITV Breakfast. BBC channels do not include BBC HD. CITV is excluded.

PSB output, children's genre, all hours: 1998-2013



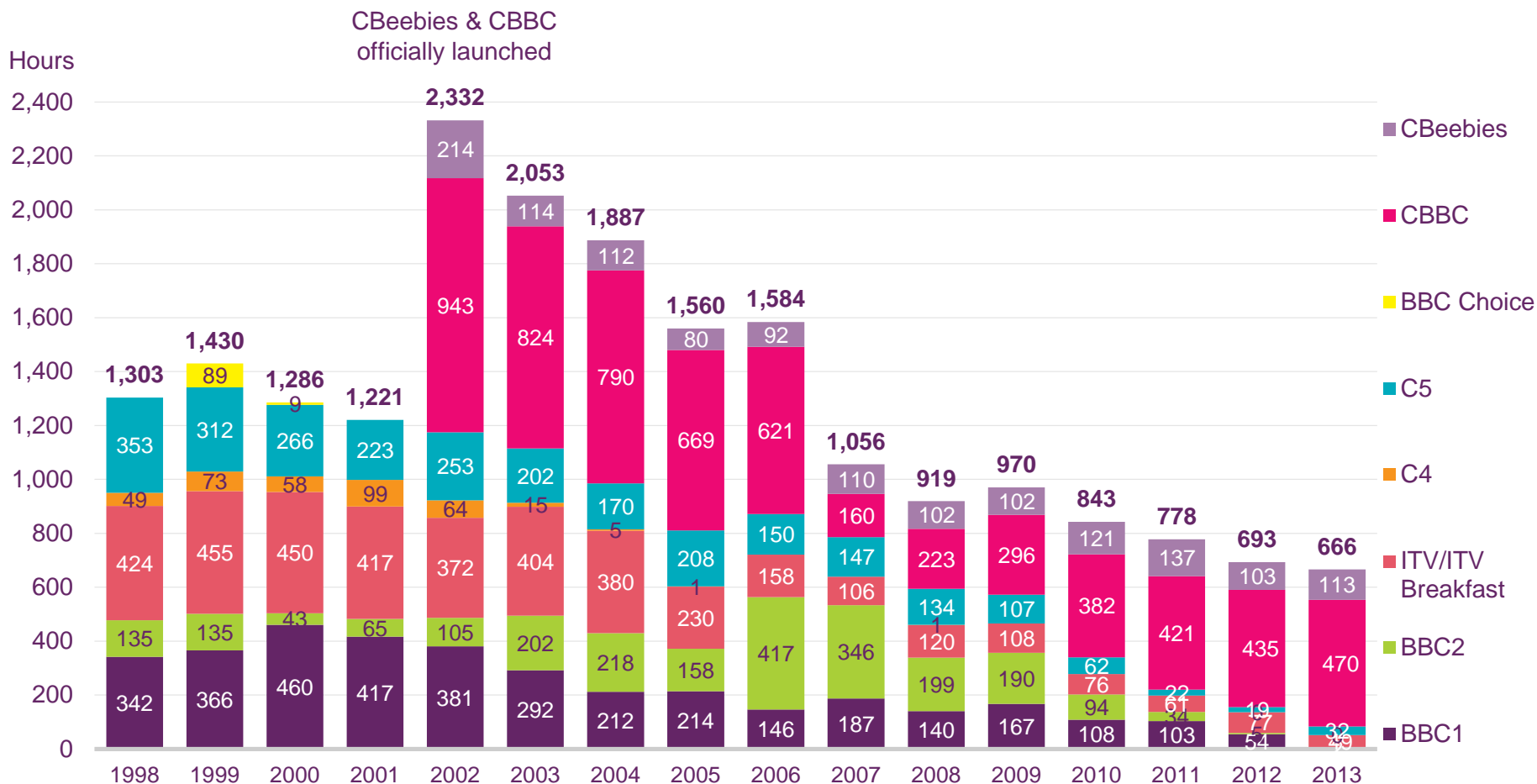
Source: Ofcom/broadcasters. Note: CITV and S4C are excluded. Based on slot time

Children's output on PSB channels, all hours: 1998-2013



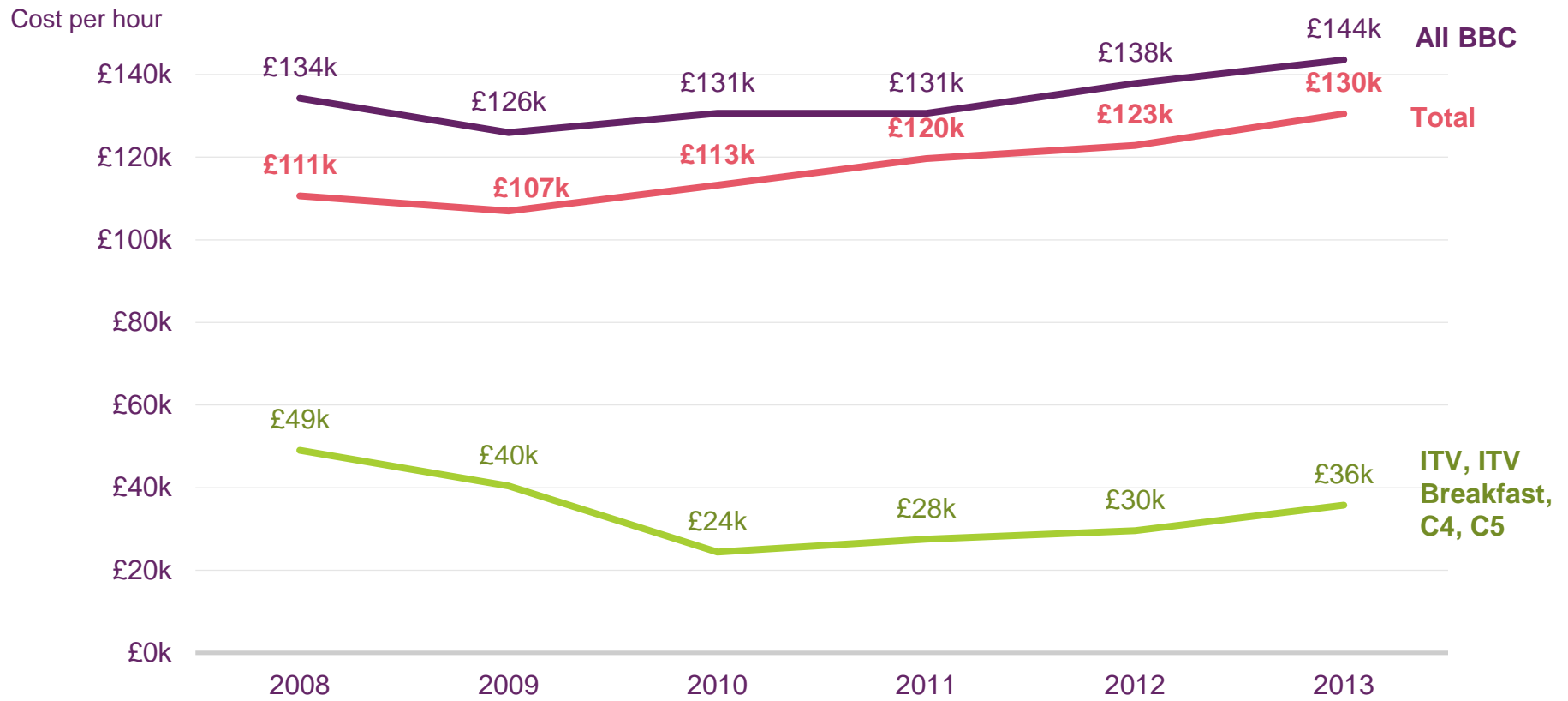
Source : Ofcom/broadcasters. PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies. Excluded: CITV and S4C. Based on slot time.

PSB output, children's genre, first-run originated hours: 1998-2013



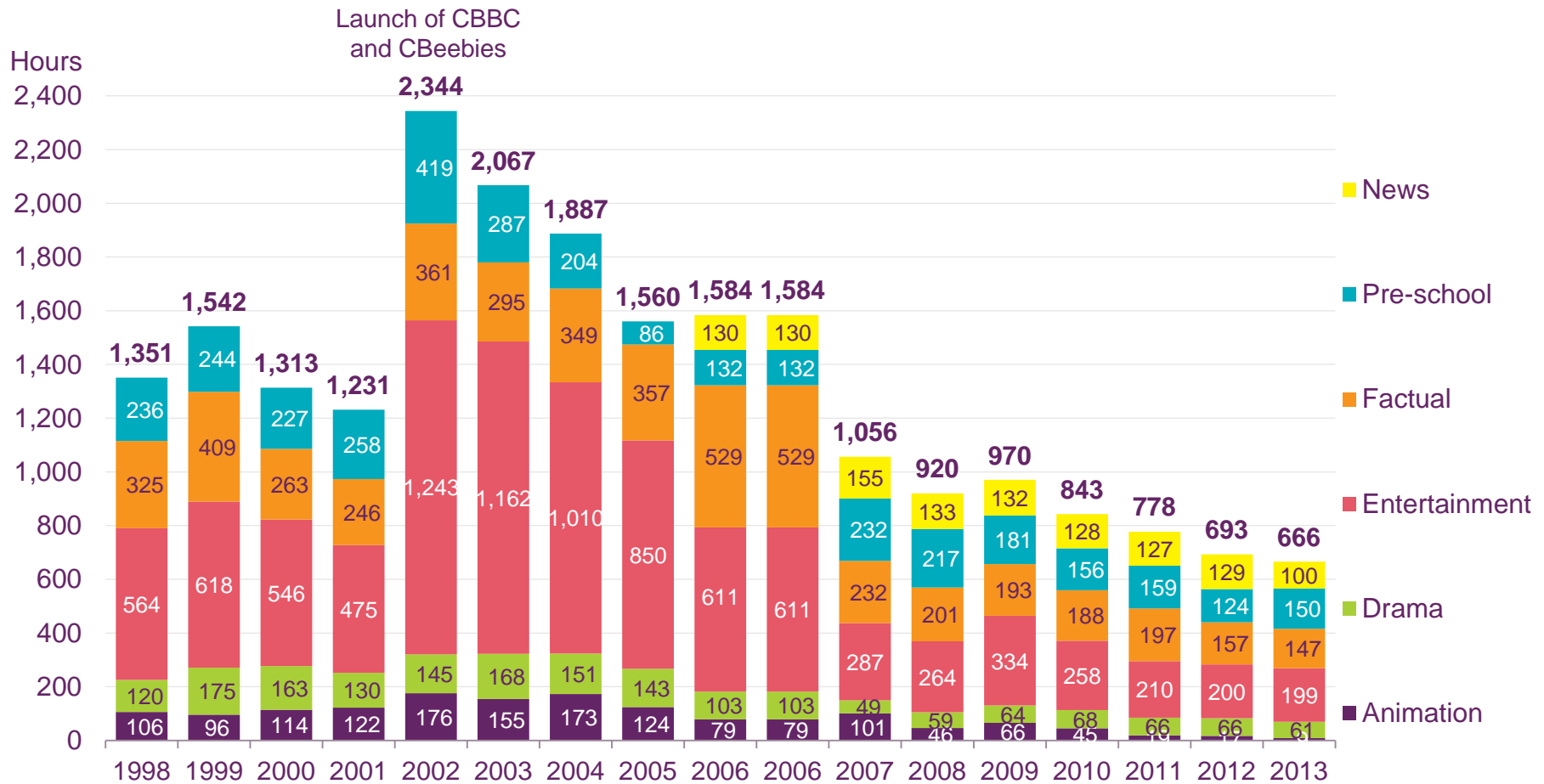
Source: Ofcom/broadcasters. Note: Output on the CITV channel is excluded. Based on slot time

PSB cost per hour, children's genre, first-run originated: 2008-2013



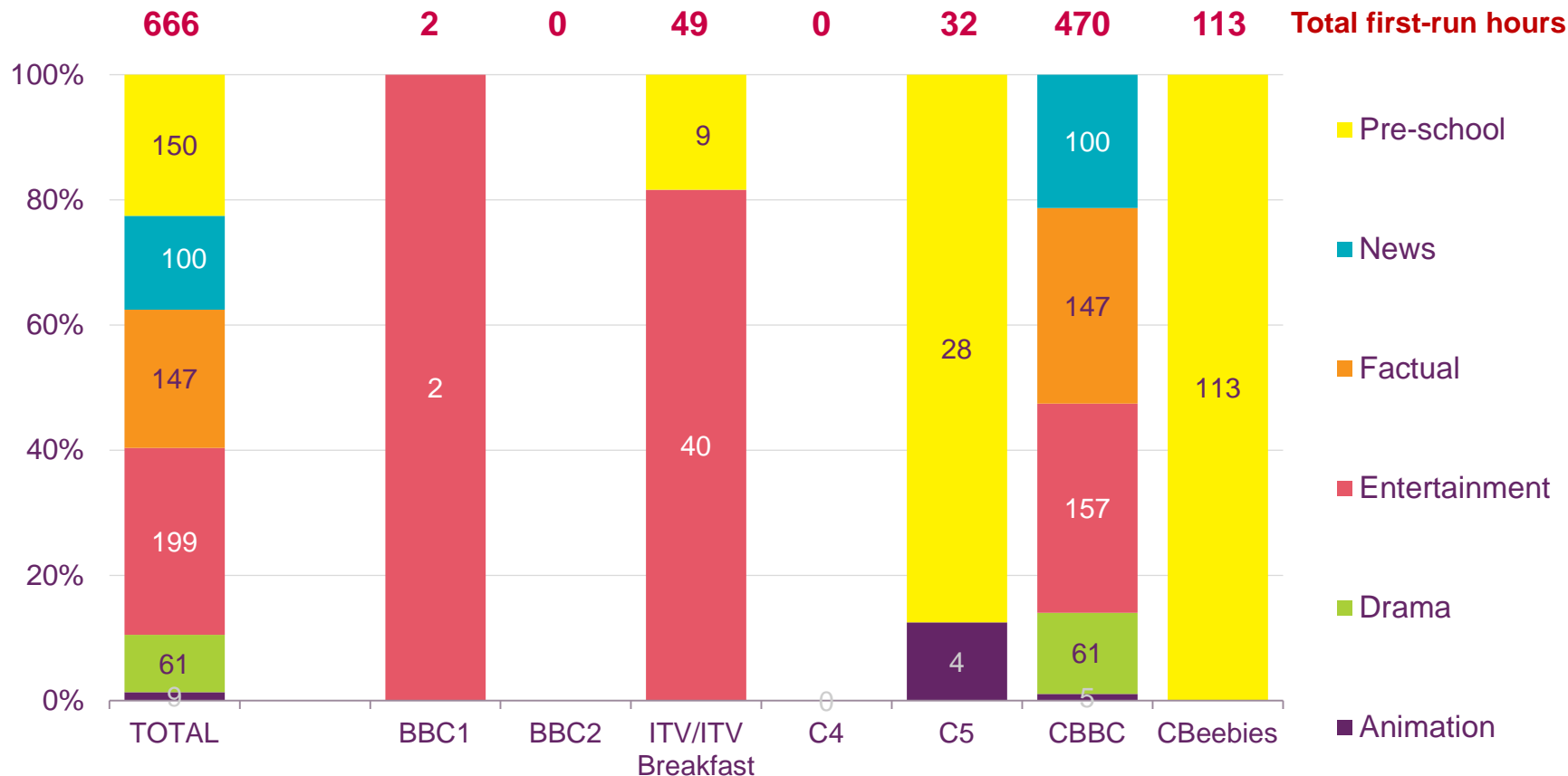
Source: Ofcom/broadcasters. Note: Spend is given in 2013 prices. Output and spend on the CITV channel is excluded.

PSB output, children's genre, first-run hours by sub-genre: 1998-2013



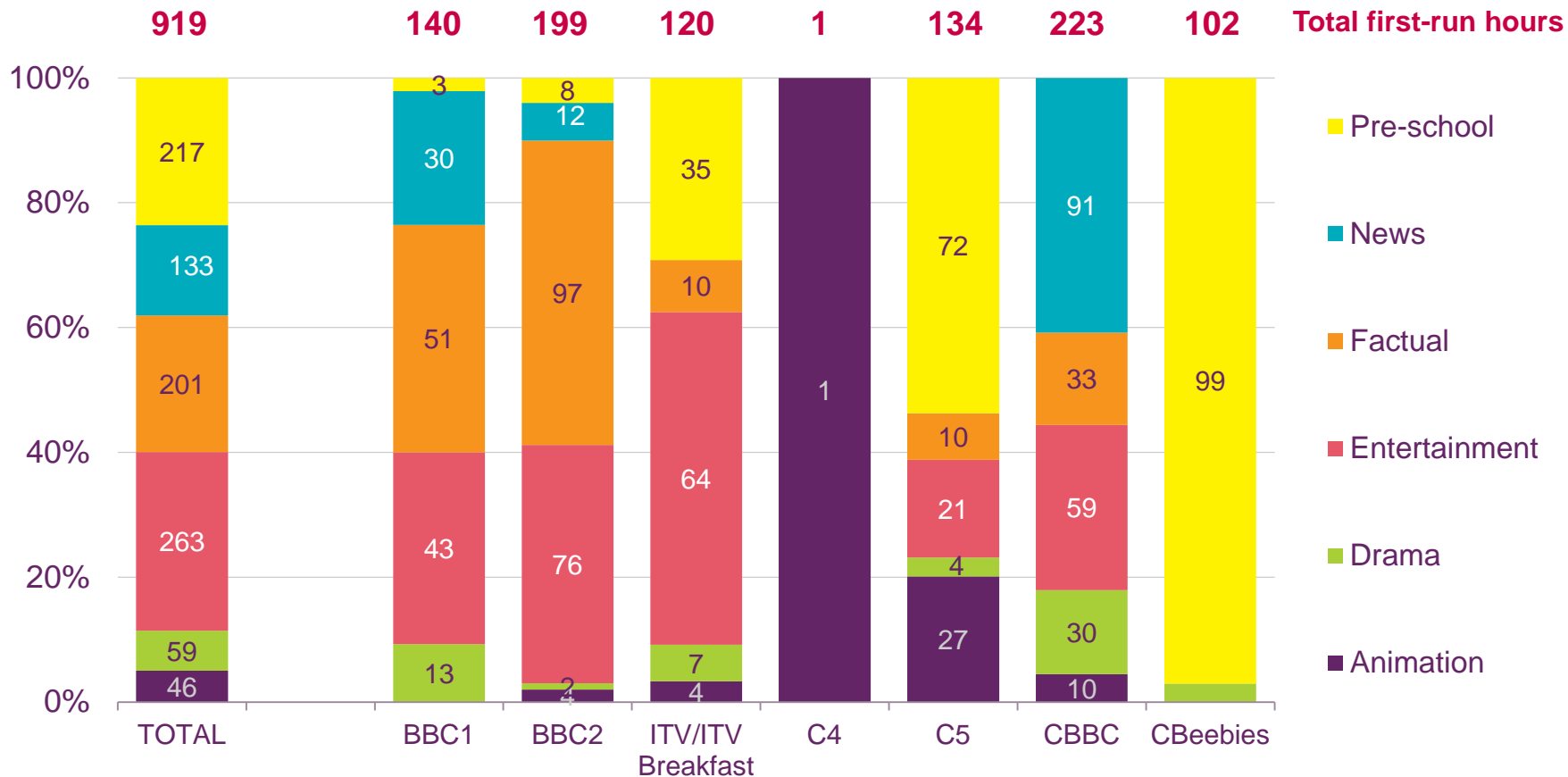
Source: Ofcom/broadcasters. PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies. Excluded: CITV and S4C. Based on slot time

PSB output, children's genre, first-run hours by sub-genre and by channel: 2013



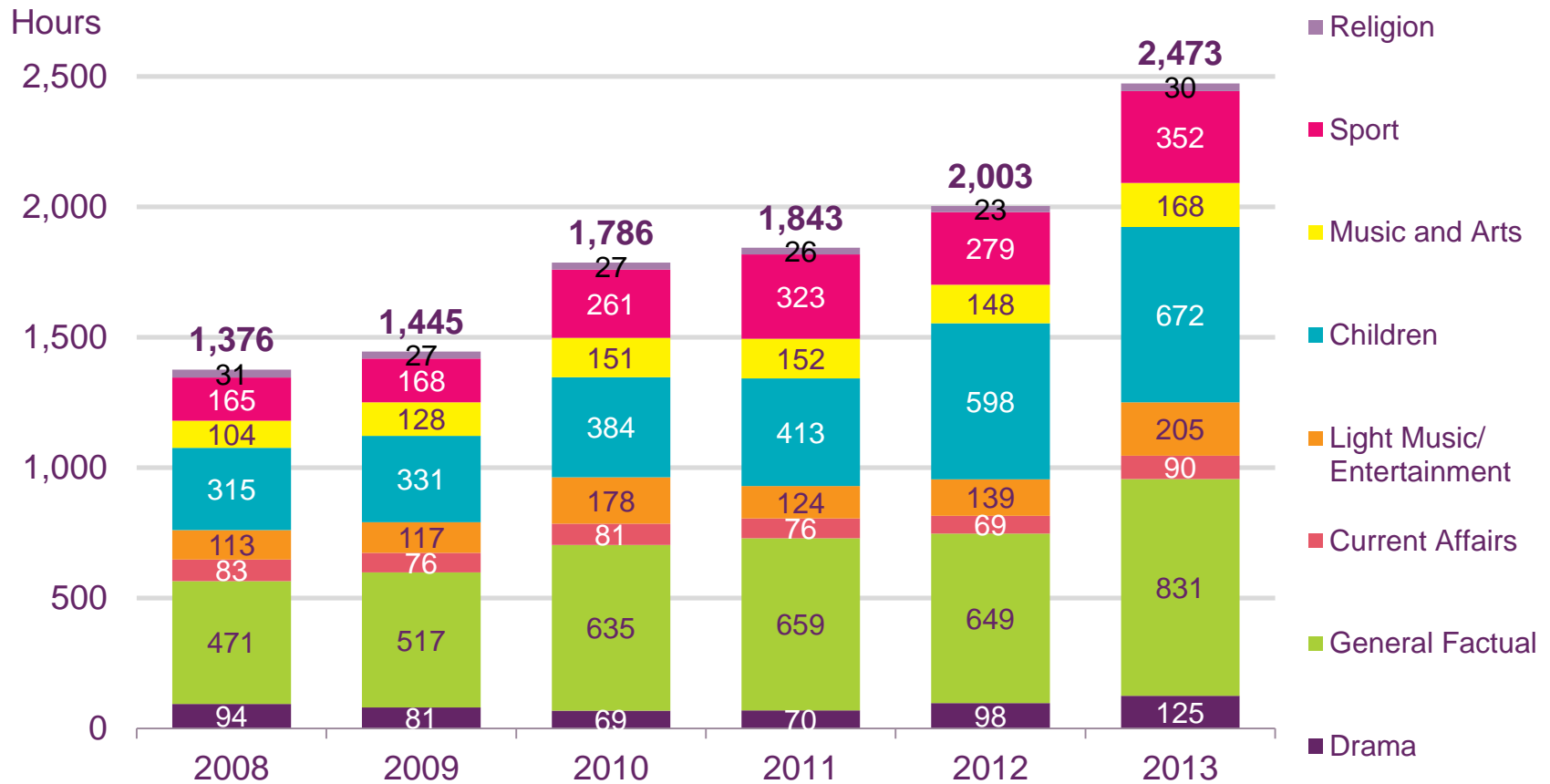
Source: Ofcom/broadcasters. PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies. Excluded: CITV and S4C. Based on slot time

PSB output, children's genre: first-run hours by sub-genre and by channel: 2008



Source: Ofcom/broadcasters. PSB Channels included: BBC One, BBC Two, ITV, Channel 4, Channel 5, CBBC, CBeebies. Excluded: CITV and S4C. Based on slot time

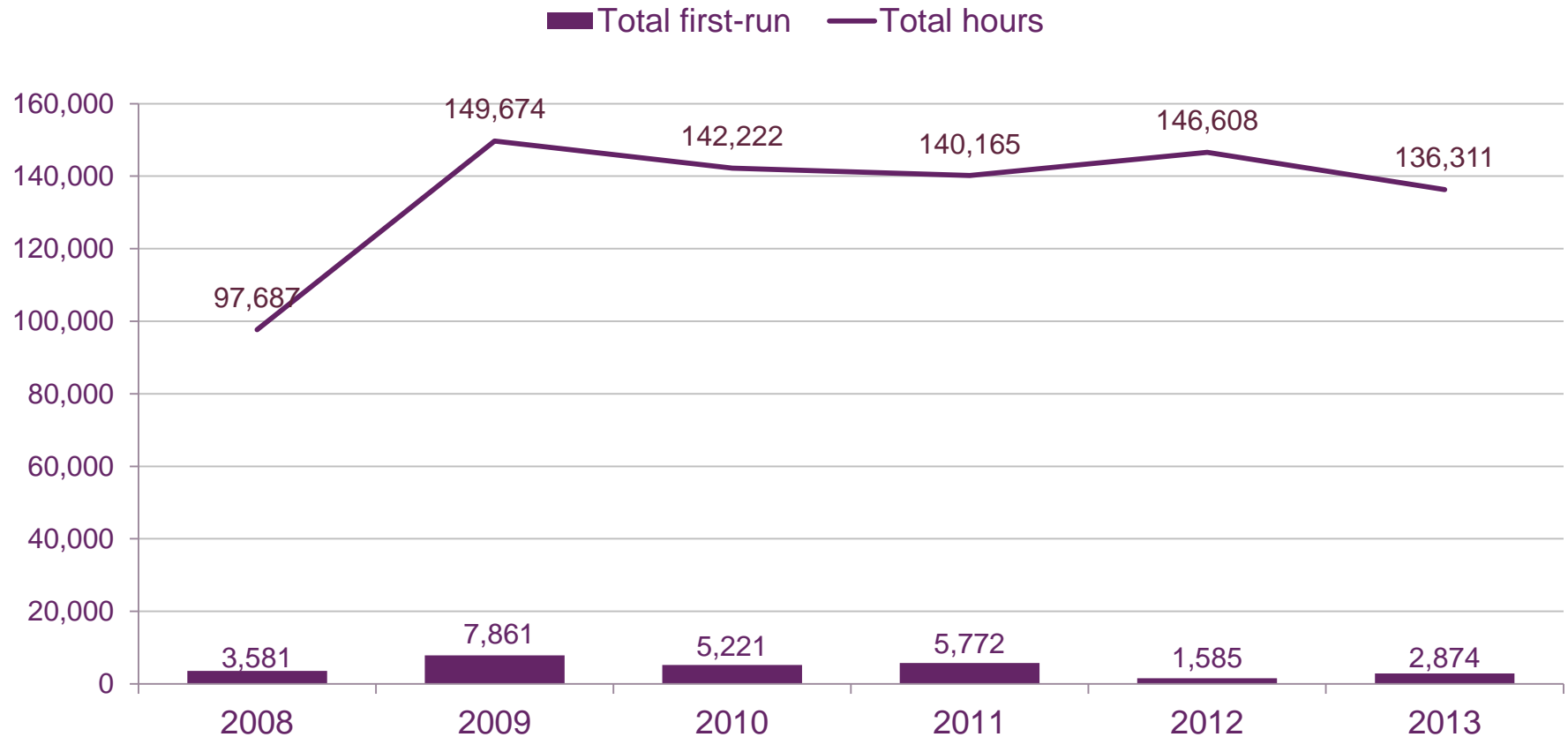
Hours of S4C Welsh language programming



Source: S4C Annual Report and Accounts 2008 – 2013. First-run commissions. Based on slot time (http://www.s4c.co.uk/abouts4c/authority/e_annualreports.shtml).

Non-PSB children's channels hours: 2008-2013

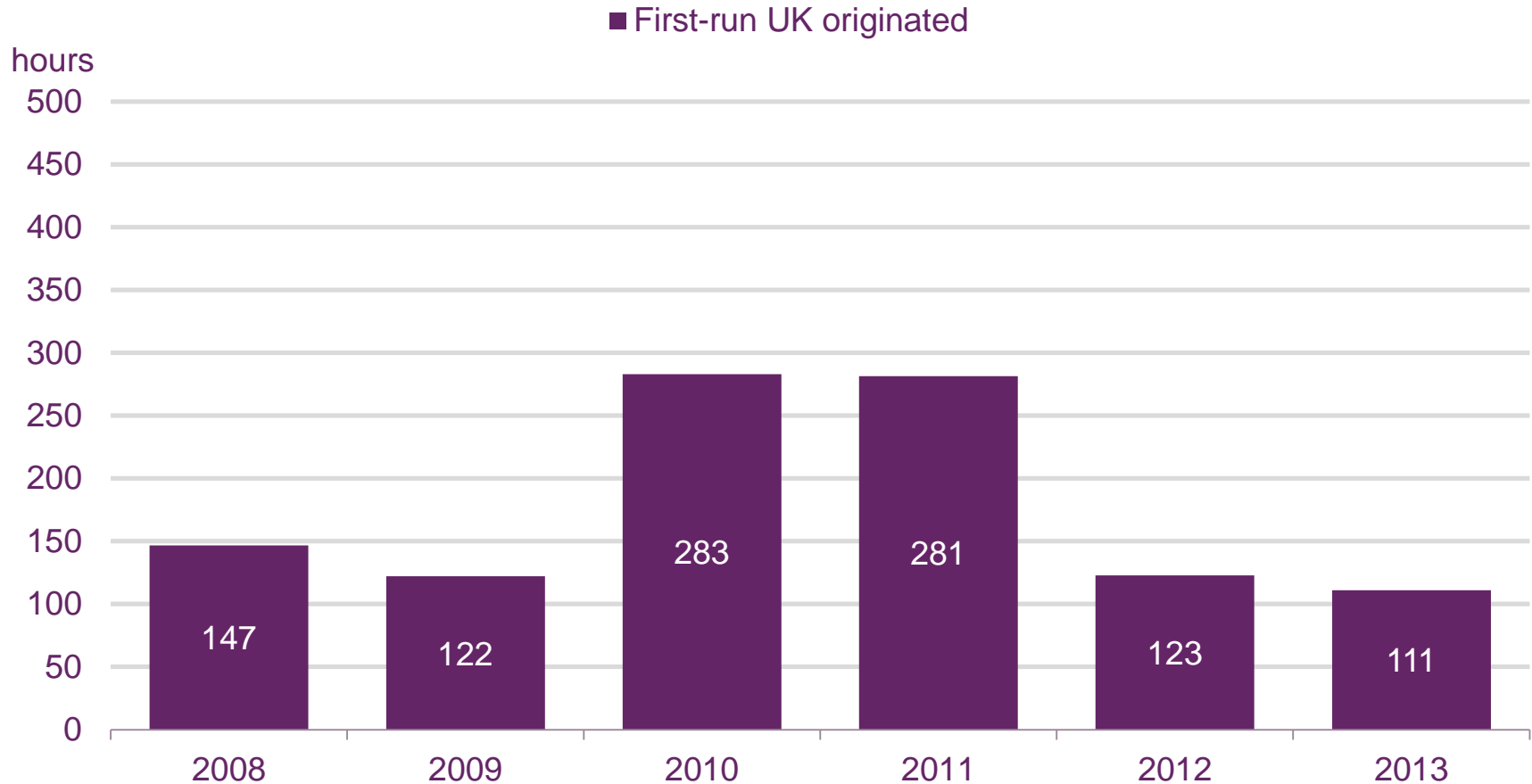
Total hours declined year on year as first-run originated hours almost doubled



Source: Ofcom/broadcasters.

Note: Includes Baby TV, Baby First TV, CITV, Nick Jr., Nick Jr. 2, Nickelodeon, Nicktoons TV, Disney Channel, Disney Cinemagic, Disney Junior, Disney XD, Boomerang, Cartoon Network UK and Cartoonito. Output hours based on slot time.

Commercial children's channels' first-run UK-originated hours: 2008-2013



Source: Ofcom / broadcasters. Note: Broadcasters includes ITV, Viacom, Turner, Disney, CSC and Baby TV. Output hours are based on running time.

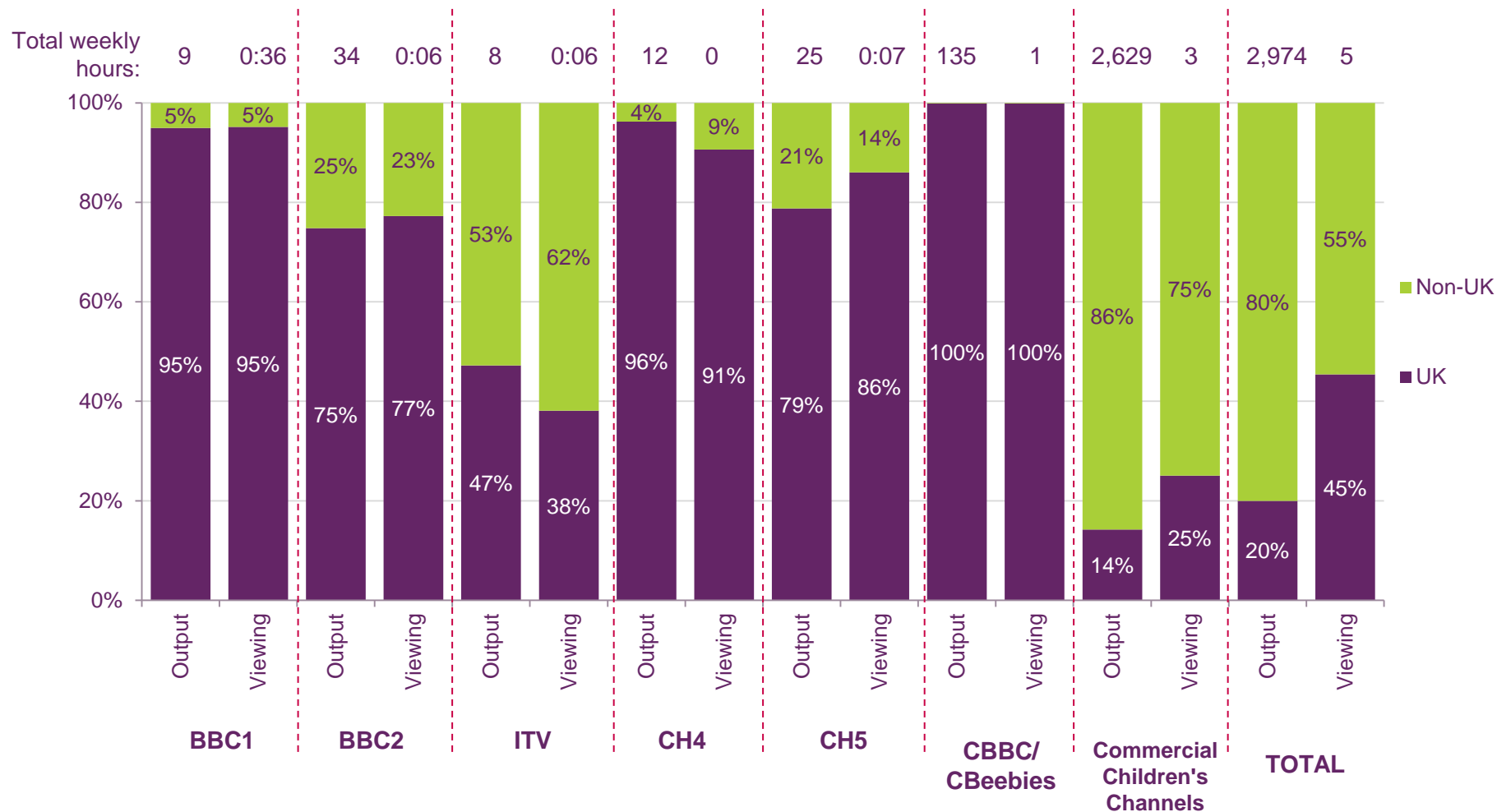
Number of dedicated children's channels (BARB): 1998-2013

No. of dedicated children's channels



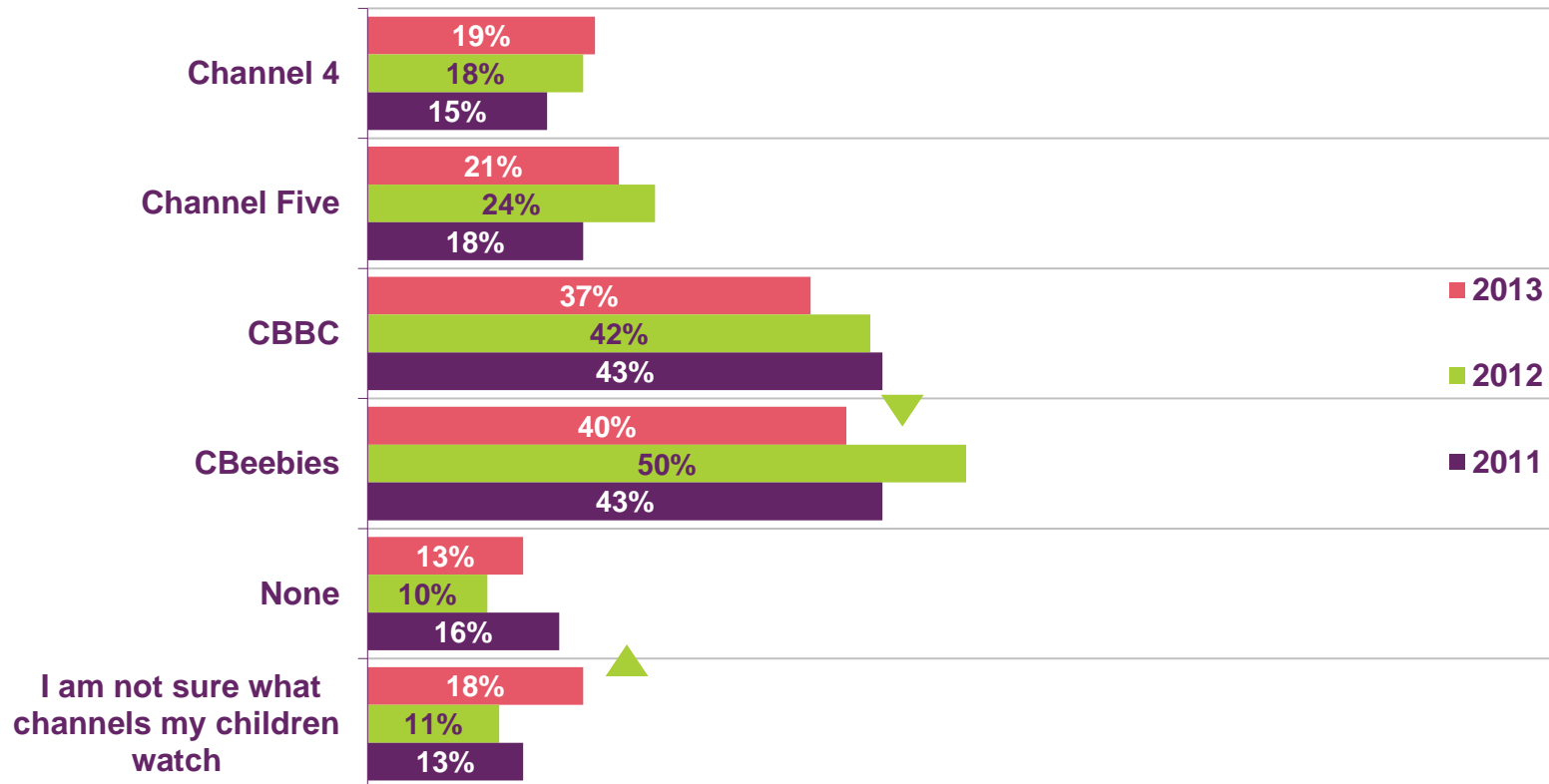
Source: BARB. Dedicated children's channels include CBBC and CBeebies. Figures include + 1 channels. Reflects channels that were transmitting/part-transmitting during 2013.

Proportion of output and viewer hours by UK and non-UK programme origin, children 4-15: 2011



Source: Attentional / BARB (Programmes with BARB code "Children's," Demographic Children 4-15)

Proportion of UK sample's children who are regular viewers of children's PSB channels



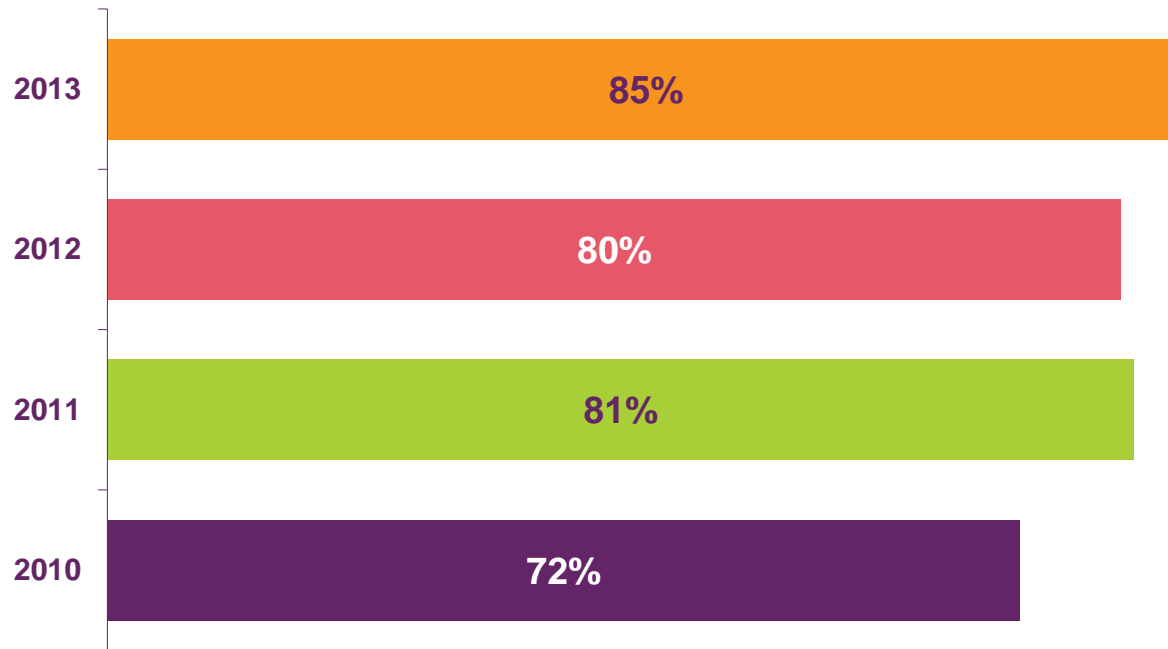
▲ Shows direction of significant differences from 2012 to 2013 at 99% level

Q On which of these channels does/do your child/children regularly watch programmes aimed specifically at children?

Base: All responsible for children under 16 (636, 518)

Parents' opinions on the importance of children's PSB

'It provides a wide range of high quality and UK-made programmes for children'



No significant differences from 2011/2012 to 2013 at 99% level

NB in 2010 the question was asked as part of the main Importance and Delivery section along with the other statements. In 2011 it was asked in a separate children section, after the questions on overall satisfaction had been asked.

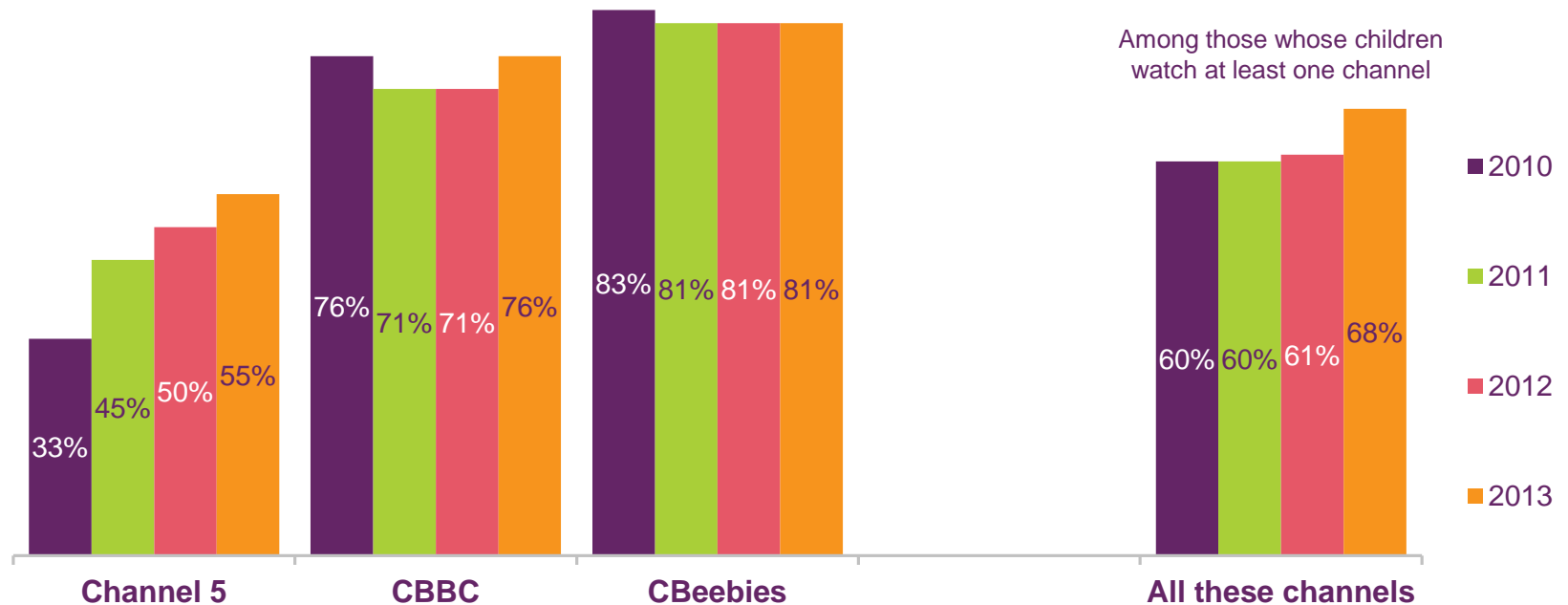
In 2010 channels asked about were BBC One, BBC Two, ITV1, Channel 4, Five, Cbeebies and CBBC. In 2011 BBC Two, ITV1 and Channel 4 were not included. In 2012 BBC One was not included.

Extent to which the characteristic is important, where 10 means 'extremely important' and 1 means "not at all important" (% rating 10/9/8/7)

Base: 2010 – All in Sample A (3569); 2011 / 2012 / 2013 – All whose children regularly watch any of those channels BBC One, Channel 5, CBeebies, CBBC, S4C (363, 487, 333)

Parents' opinions on the delivery of children's PSB

'It provides a wide range of high quality and UK-made programmes for children'



No significant differences from 2011/2012 to 2013 at 99% level

Note: Asked of more channels prior to 2011

Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and one is the lowest. (% rating 10/9/8/7)

Base for 'all children's' PSB channels: All respondents whose children regularly watch at least one channel (1448,363,487, 333)

Base for individual channels: Those whose children are regular viewers of each channel featured (CBBC = 805,180,271,203

CBeebies = 782,218,320,218 Channel Five = 574,89,140, 112)

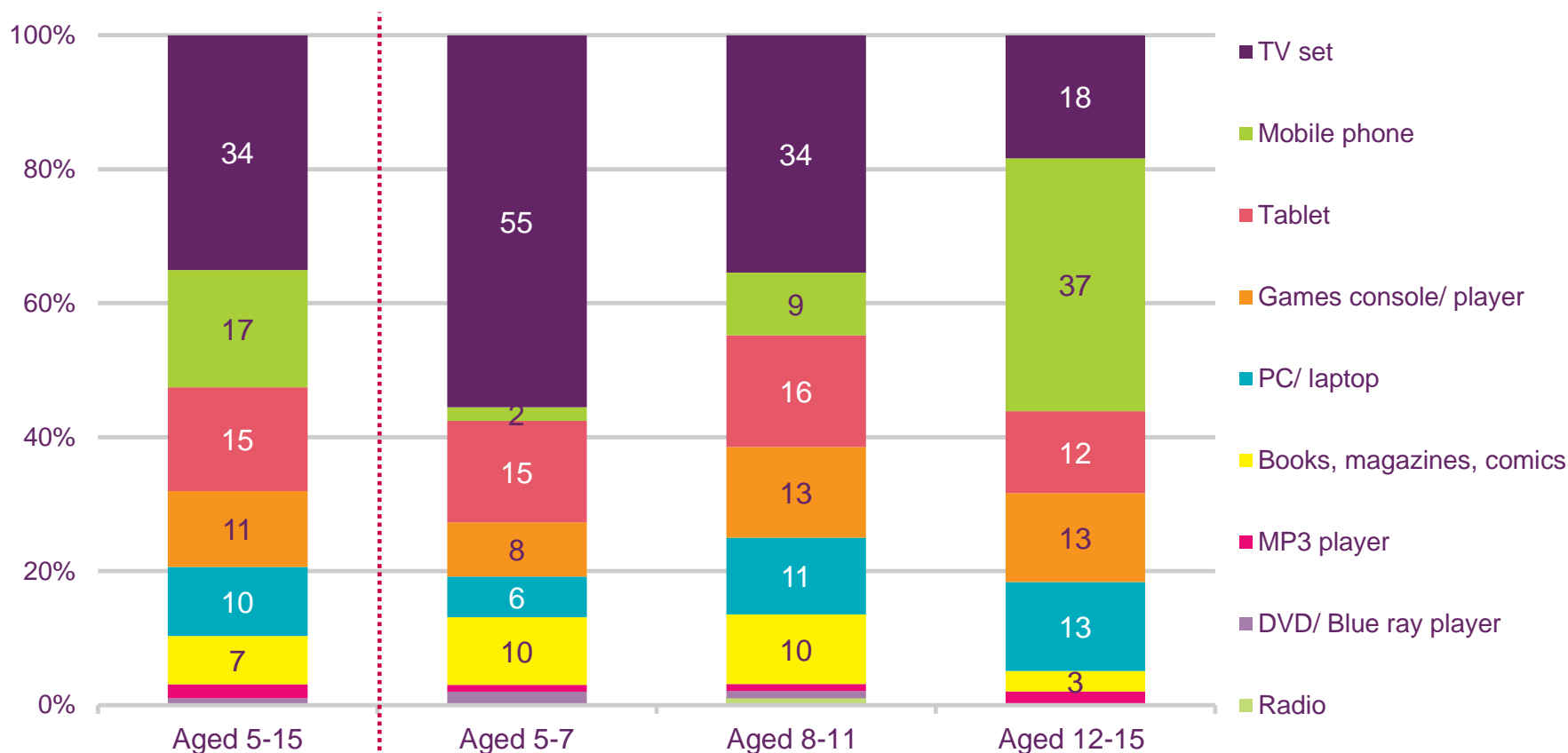
Estimated weekly hours of media consumption at home or elsewhere among users, by age: 2014



QP10A-B/ QP29A-B/ QP70A-B/ QP22A-B – How many hours would you say he/ she spends [USING MEDIUM] on a typical school day/ on a weekend day?). In 2014 responses are taken from the child aged 8-11 or 12-15 rather than the parent. In 2013 the response for 12-15 was taken from the child and the parent for 3-4s 5-7s and 8-11s. In 2013 parents/ children were asked about use at home whereas in 2014 they were asked about use at home or elsewhere.

Base: Parents of children aged 3-7 and children aged 8-15 who use each medium (VARIABLE BASE) - Significance testing shows any differences between 2013 and 2014 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to June 2014

Devices children would miss the most, by age: 2014



QC46 – Which one of the things you use almost every day would you miss the most if it got taken away? (prompted responses, single coded)

Base: Children aged 5-15 (1660 aged 5-15, 453 aged 5-7 in 2014, 609 aged 8-11 in 2014, 598 aged 12-15 in 2014)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to June 2014