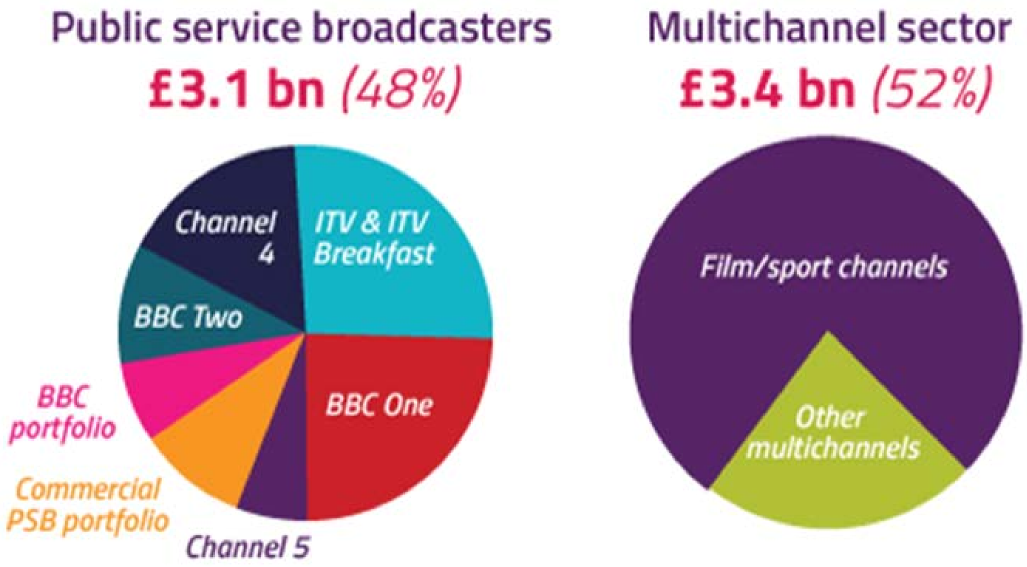
Figure 2.1

Spend on network TV programmes: 2015



Source: Ofcom/broadcasters. Note: Figures expressed in nominal prices. Figures do not include spend on nations' and regions' output. BBC portfolio channels includes BBC Three, BBC Four, BBC News, BBC Parliament, CBBC and CBeebies (but not BBC HD). Commercial PSB portfolio channels include, ITV2, ITV3, ITV4, CITV, ITVBe, ITV Encore, ITV Breakfast 2, E4, More 4, Film 4, 4Seven, Five USA, 5* and Spike (and their '+1' channels) 'Other multichannels' include all genres (excluding sports and films). Programme spend comprises in-house productions, commissions from independents, acquired programmes and repeats (originations and acquisitions).

Figure 2.2

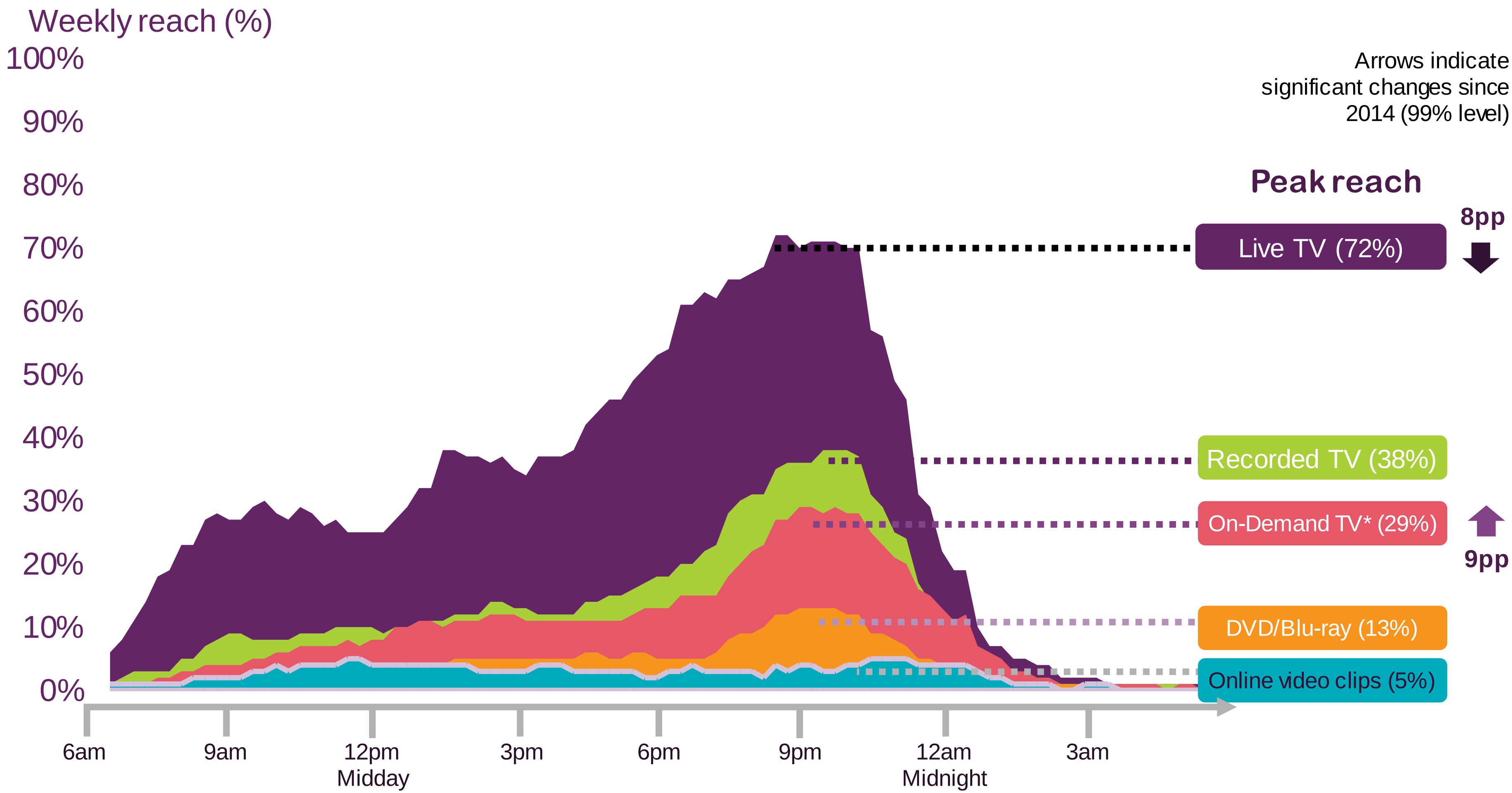
Industry metrics

UK television industry	2010	2011	2012	2013	2014	2015
Total broadcast TV industry revenue (£bn)	11.8	12.4	12.5	12.8	13.2	13.6
Proportion of revenue which is BBC income allocated to TV	22%	21%	21%	20%	21%	19%
Proportion of revenue generated by advertising	30%	29%	28%	29%	29%	30%
Proportion of revenue generated by subscriptions	43%	44%	44%	46%	45%	45%
Total online TV industry revenue (£m)	180	238	379	574	795	976
Broadcaster share of total display advertising spend	43%	43%	43%	43%	43%	43%
Spend on originated output by 5 main PSB channels (£bn)	2.5	2.5	2.6	2.5	2.6	2.6
Spend on network content by UK broadcasters (£bn)	5.4	5.5	5.6	5.8	6.4	6.5
Digital TV homes (% all households)	92%	94%	96%	95%	93%	95%
Traditional pay-TV subscriptions	14.4m	14.7m	15.0m	16.0m	17.1m	17.9m
Minutes spent watching TV per day (per person aged 4+)	242	242	241	232	220	216
Share of the main five PSB channels in all homes	55%	54%	52%	51%	51%	51%
VoD usage (% of adults 15+)	27%	43%	38%	51%	57%	59%

Source: Ofcom/broadcasters/IHS/Advertising Association/Warc/BARB/GfK. Note: Expressed in nominal terms. BBC income allocated to TV includes the proportion of the licence fee that goes to S4C. Broadcaster share as a proportion of total display advertising spend excludes direct mail and classified ads and is based on Advertising Association/Warc Expenditure Report. The AA/Warc data are net of discounts, and include agency commission, but excludes production costs. Spend on originations includes spend on nations and regions programming (not Welsh or Gaelic language programmes but some Irish language). Traditional pay-TV subscriptions are from Sky, Virgin TalkTalk and BT and are provided by Enders Analysis. Sky figures include Now TV, ROI and overseas business subscriptions. TV viewing based on BARB analysis of viewing to scheduled TV programmes on TV sets up to seven days after first broadcast. After DSO in October 2012, all homes were required to have digital TV. From 2013, data refers to the proportion of UK homes that had a working TV set as defined in BARB's Establishment Survey. Data refers to Q4 of each year. BARB changed the methodology for defining a TV set home from Q4 2015 and data comparisons to previous years should be treated with caution. VoD usage figures provided by Kantar Media – TGI.

Figure 2.3

Weekly reach of watching activities, by time of day

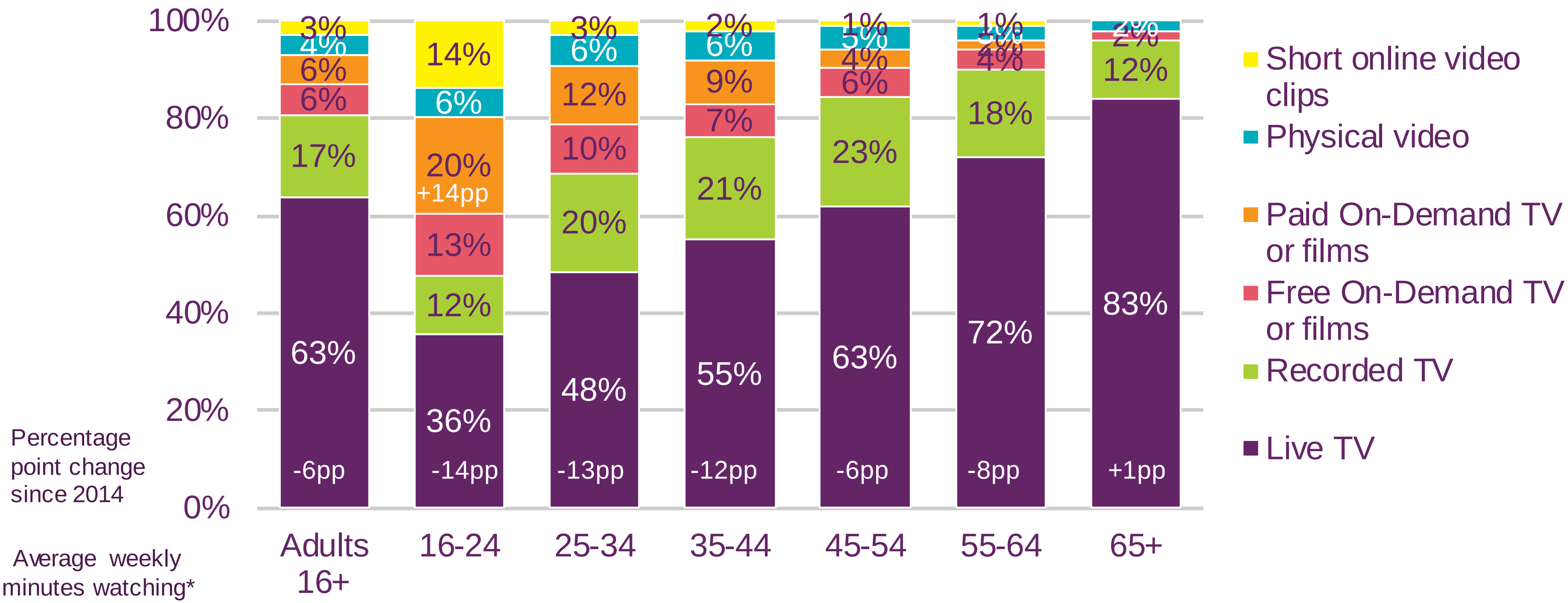


Source: Ofcom Digital Day 2016. Base: Adults aged 16+ (1512)
Adult diary: Chart shows the proportion of adults who recorded each watching activity (D) at each time slot across a week.
*On-demand TV includes paid and free on-demand

Figure 2.4

Proportion of time spent watching, attributed to activities by age group

Proportion of time spent watching by activity (%)



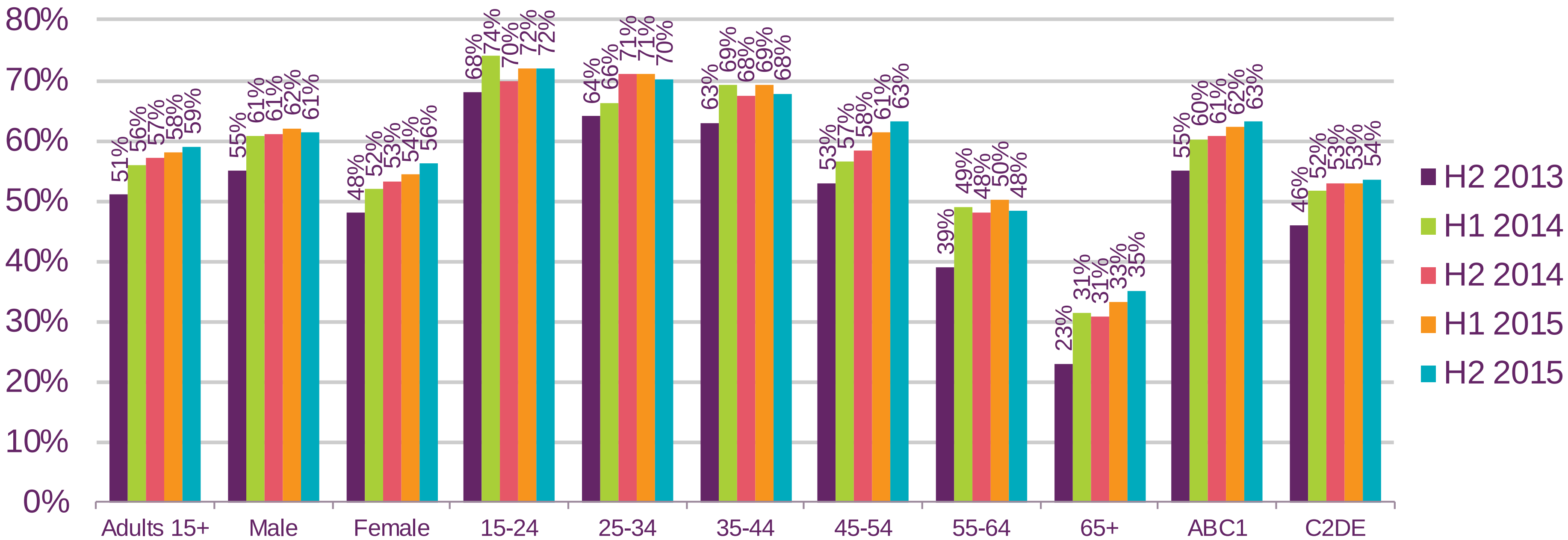
Average weekly minutes watching*	Adults 16+	16-24	25-34	35-44	45-54	55-64	65+
2016	1795	1638	1536	1538	1710	2045	2203
2014	1814	1776	1630	1619	1922	1960	1952

Source: Ofcom Digital Day 2016. Base: Adults aged 16+ (1512) 16-24s (129) 25-34s (189) 34-44s (282) 45-54s (299) 55-64s (259) 65+s (354)
Adult diary: Chart shows the proportion of all watching time (B2) attributed to each activity (D) by age group.
*The average weekly minutes figure is among those who did any watching activity across their diary week and also includes simultaneous activity

Figure 2.5

Reach of VoD services by age, gender and socio-economic group

Proportion watching VoD services in the past 12 months (%)

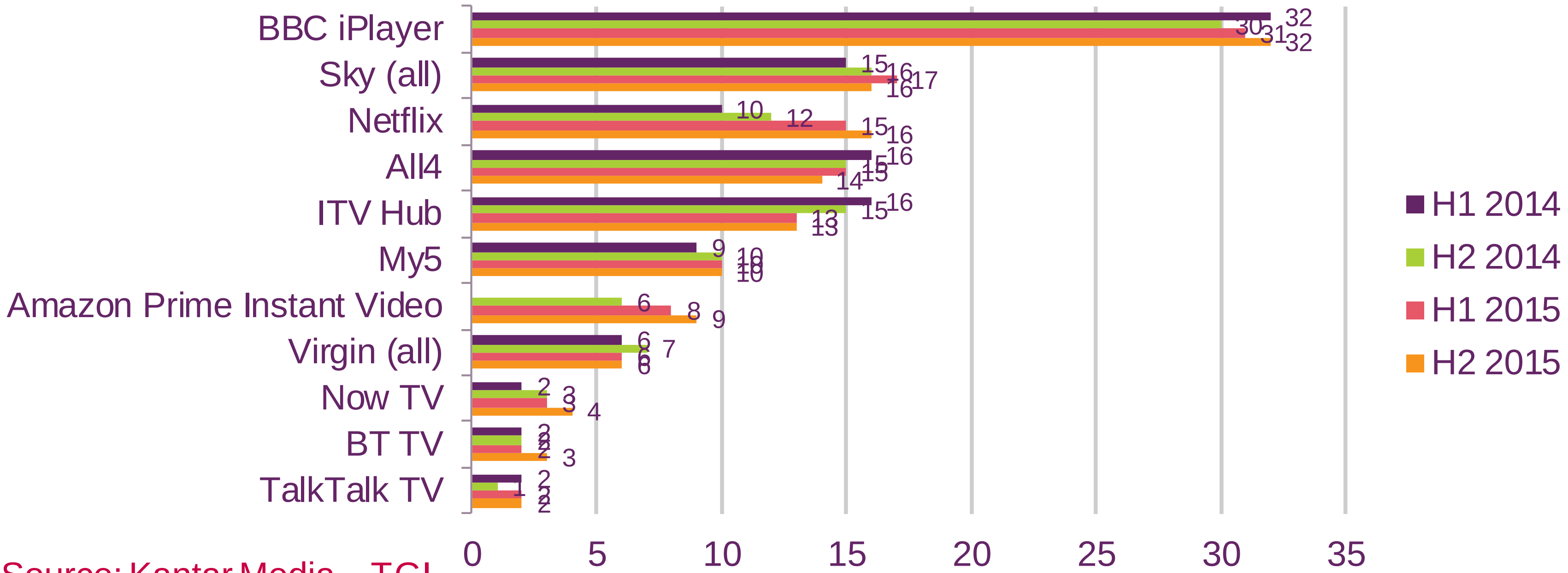


Source: Kantar Media – TGI
Base: GB adults aged 15+. H2 2013 n=12570, H1 2014 n=11657 H2 2014 n= 12849, H1 2015 n= 11972, H2 2015 n=12310
Note: For H1 2014, 'in scope' services comprise of Channel 4.com/4oD, BBC iPlayer, Blinkbox, BT TV, Demand 5, ITV.com/ITV Player, Netflix, Now TV, Sky, TalkTalk, Virgin, You View. Amazon Prime was added to the 'in scope' services in H2 2014.
Note: ITV Player was rebranded as ITV Hub in November 2015. 4oD was rebranded All4 in March 2015.BlinkBox was renamed TalkTalk TV in early 2016

Figure 2.6

Reach of selected VoD services over the past 12 months

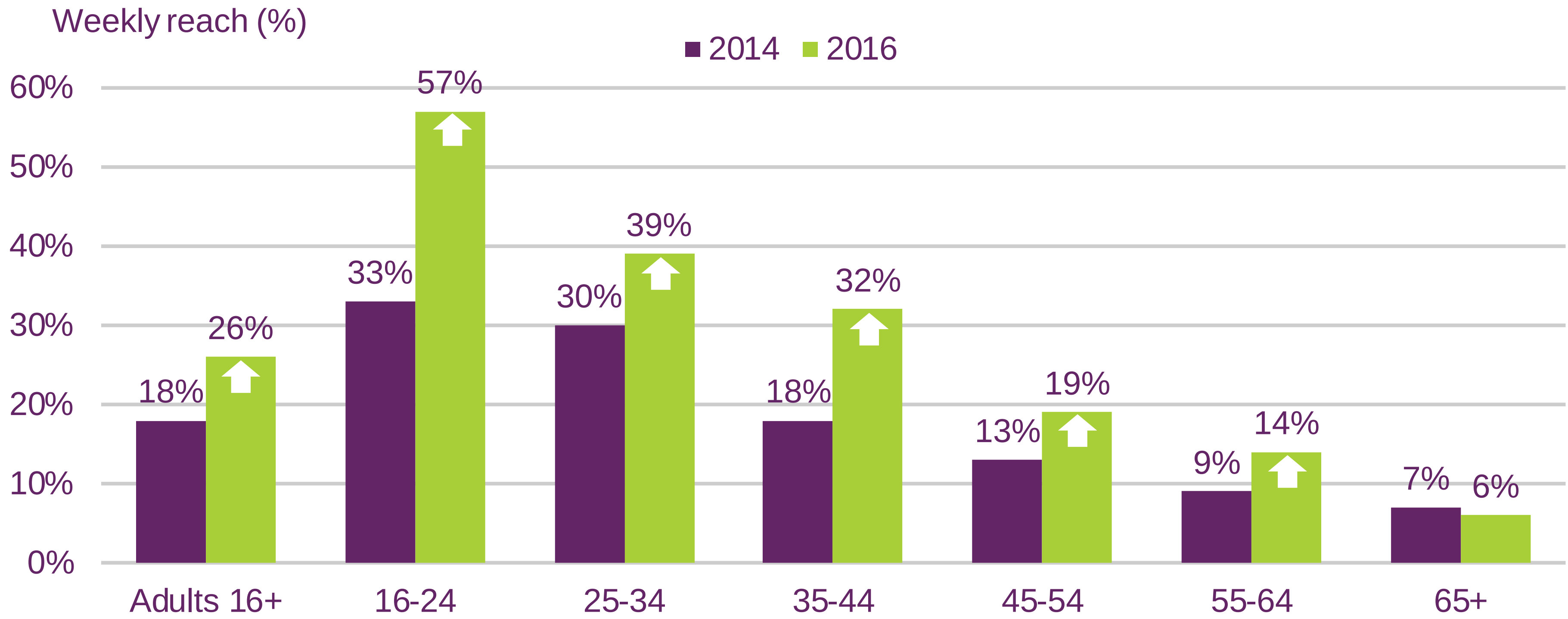
Proportion watching VoD services in the past 12 months (%)



Source: Kantar Media – TGI
Base: GB adults aged 15+. H1 2010 n=12226, H1 2013 n=11853, H1 2014 n=11657 H2 2014 n= 12849, H1 2015 n= 11972, H2 2015 n=12310
Note: LoveFilm was rebranded as Amazon Prime Instant Video February 2014. 4OD was rebranded as All4 in March 2015.

Figure 2.7

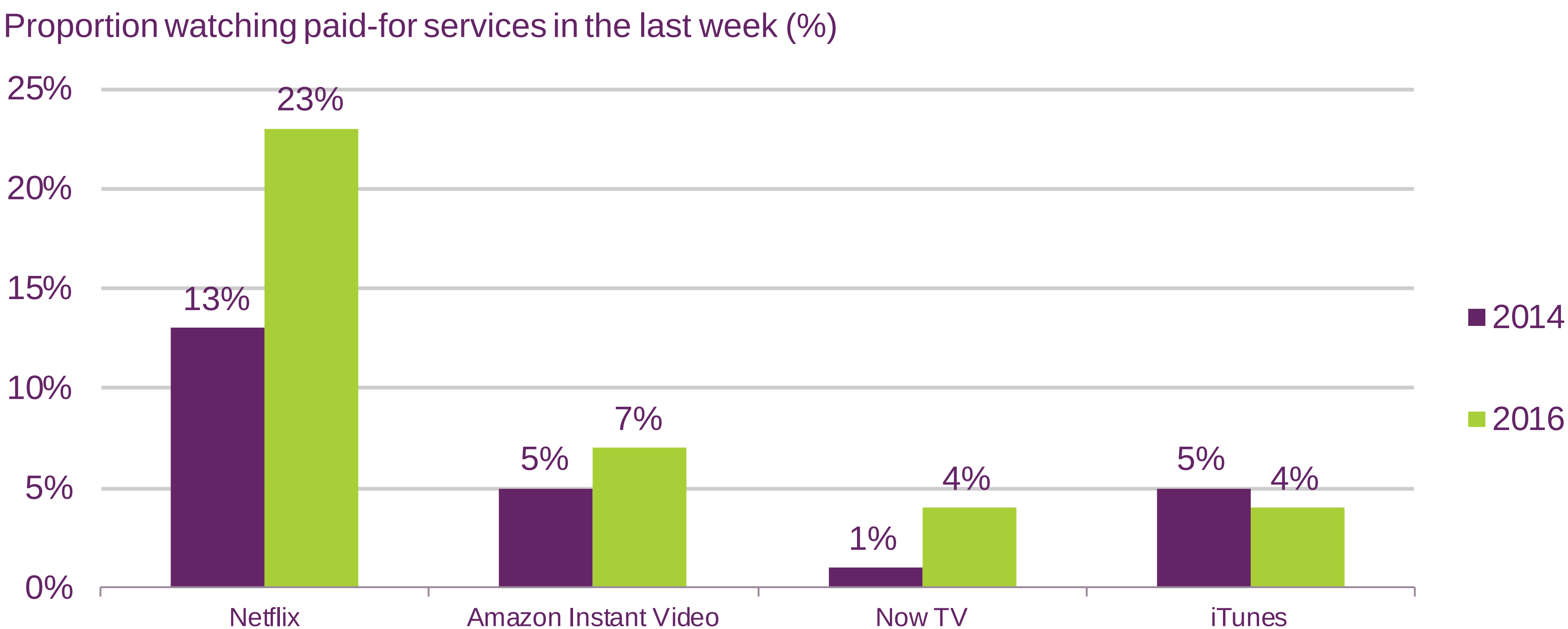
Weekly reach of paid-for on-demand, by age group: 2016 vs 2014



Source: Ofcom Digital Day 2016
Adult diary: Chart shows the proportion of adults who recorded activity (D) at any point across their diary week.
Base: 2016: Adults aged 16+ (1512), 16-24 (129), 25-34 (189), 35-44 (282), 45-54 (299), 55-64 (259), 65+ (354);
2014: Adults aged 16+ (1644), 16-24 (101), 25-34 (225), 35-44 (348), 45-54 (400), 55-64 (311), 65+ (259)
Note: Arrows show were figures have significantly increased at the 99% level since 2014

Figure 2.8

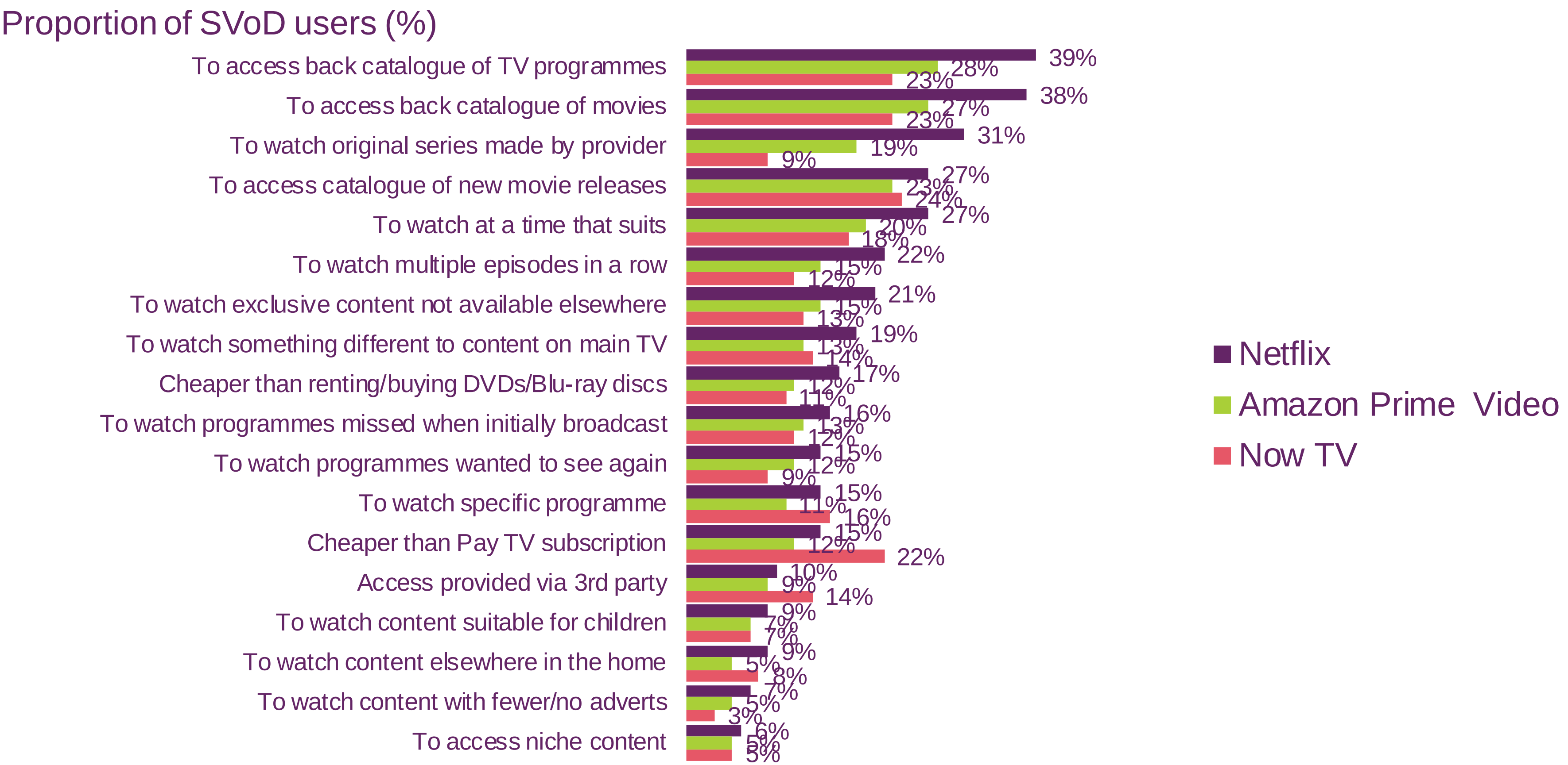
Weekly reach of the most popular paid-for on-demand services



Source: Ofcom Digital Day 2016
B2. Have you used any of the following paid-for services to stream or download films or (television) programmes in the last week?
Base: Adults aged 16+ (1512 in 2016, 1644 in 2014)
Note: Amazon Instant Video was LoveFilm Instant in 2014.

Figure 2.9

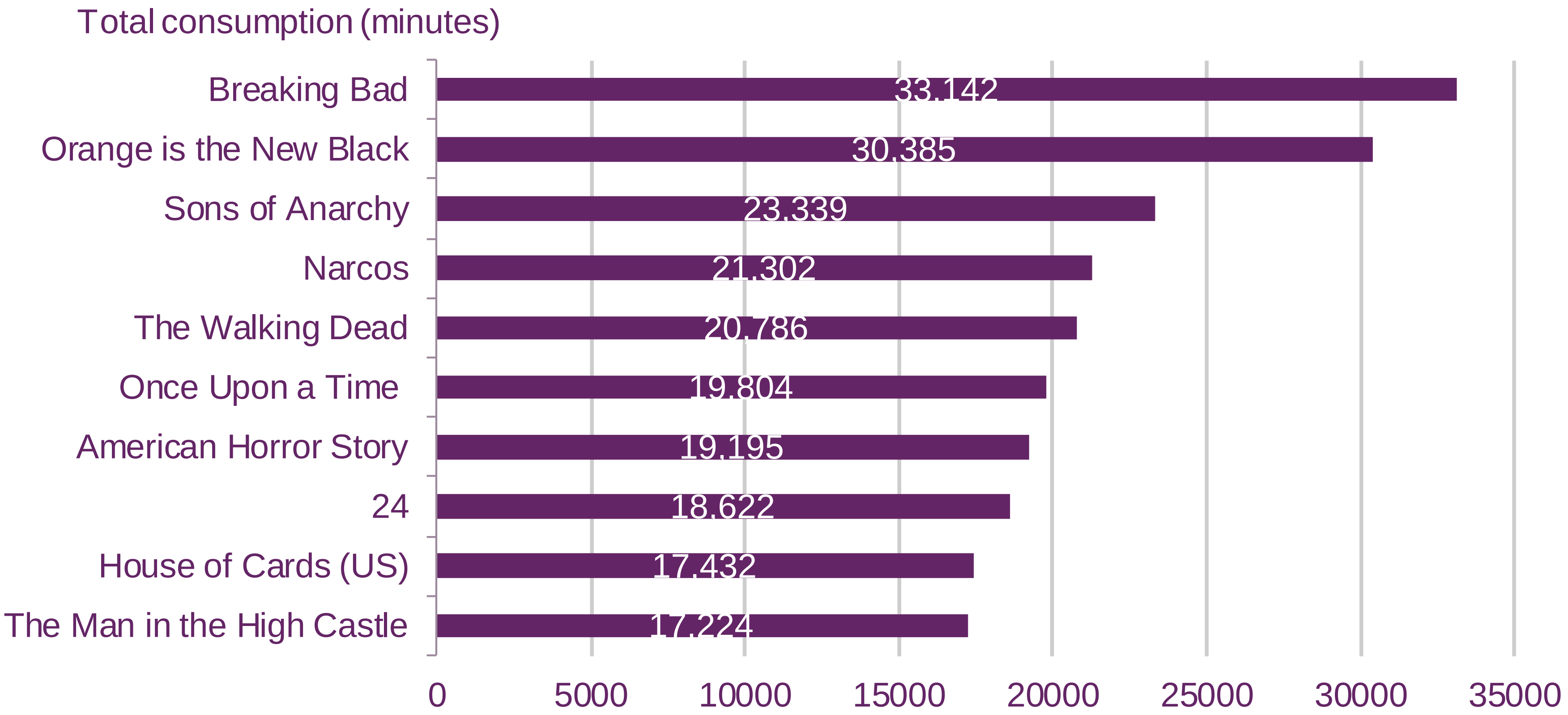
Selected reasons for signing-up/ using an SVoD service



Source: GfK SVoD Tracker, Q4 2015 October-December 2015
EW1: Reasons for signing-up for/ using service
Base: Netflix users (n=2454), Amazon Prime Video users (n=1336), Now TV users (n=619)
Note: Users include those who either subscribe to or are trialling an SVoD service

Figure 2.10

Top ten television programmes consumed among all SVoD users

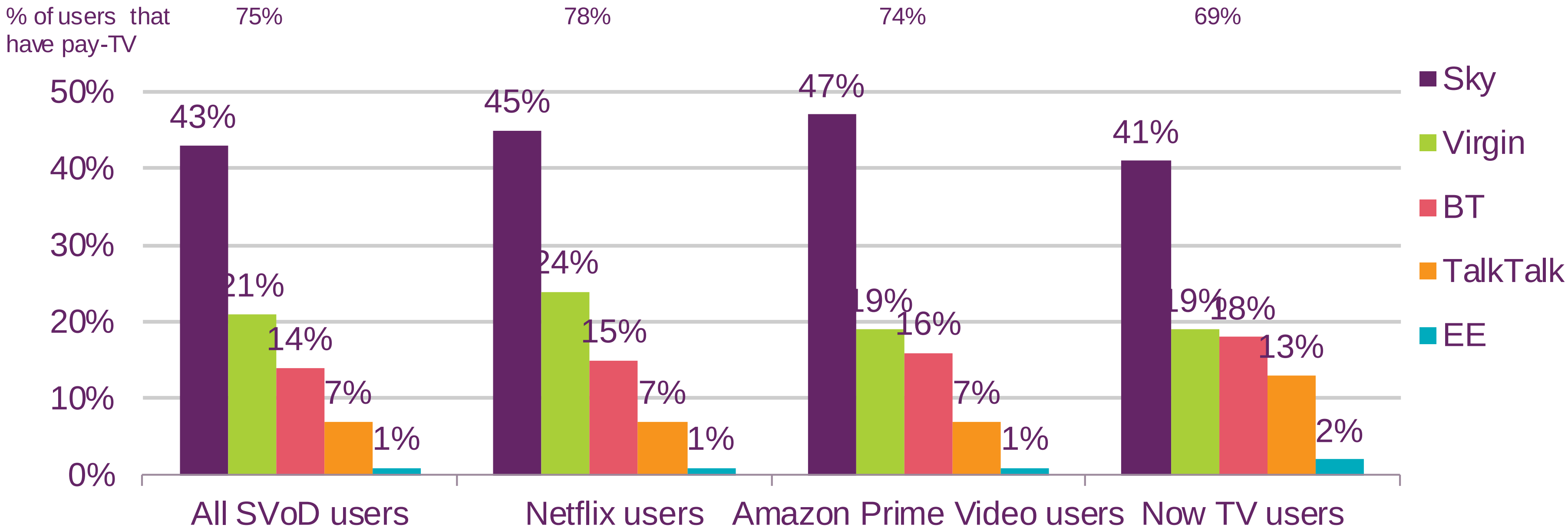


Source: GfK SVoD Tracker, Q4 2015 October – December 2015
Base: All SVoD users

Figure 2.11

Proportion of SVoD users with a pay-TV service

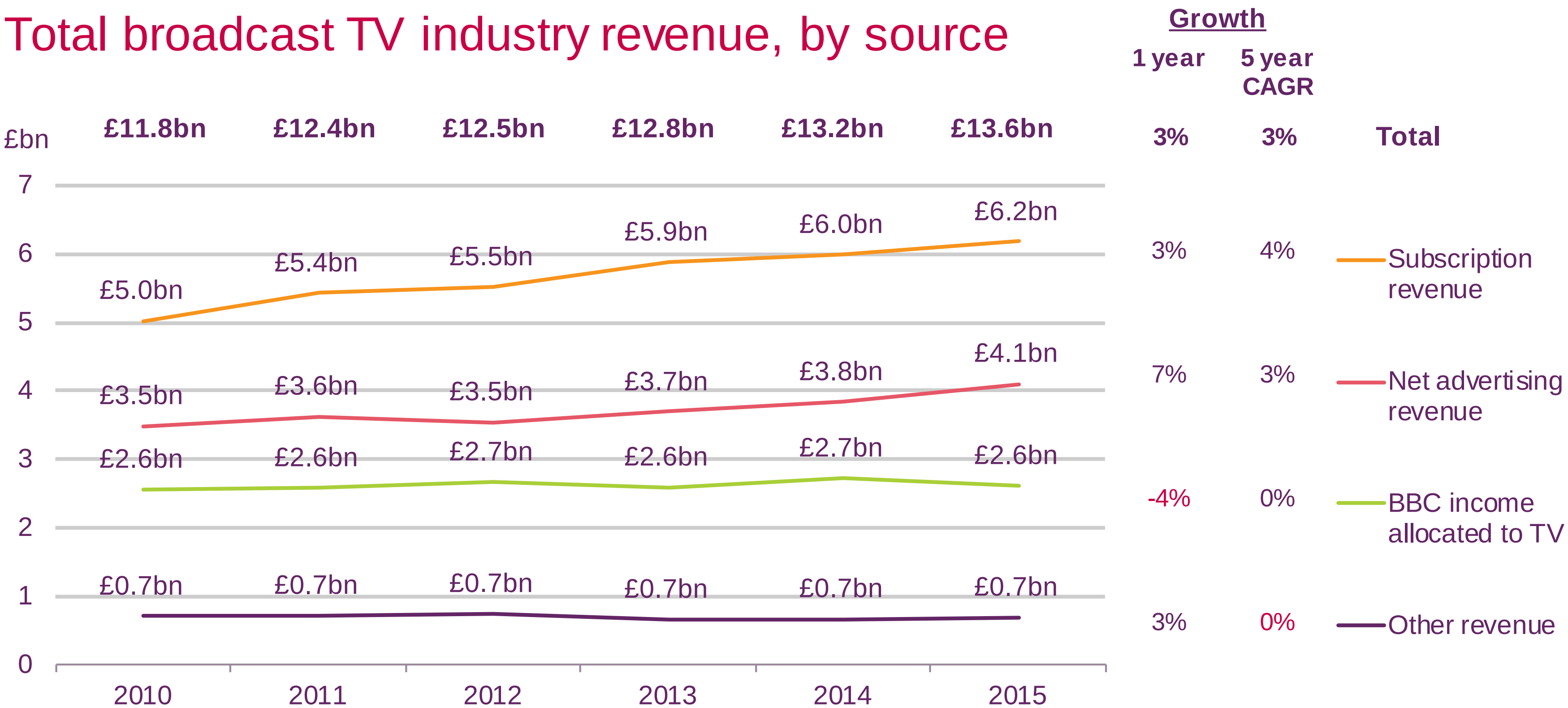
Proportion of SVoD users with pay-TV (%)



Source: GfK SVoD Tracker, Q4 2015 October-December 2015
P7: Services currently have
Base: All UK respondents (n=3259), Netflix users (n=2454), Amazon Prime Video users (n=1336), Now TV users (n=619)
Note: Users include those who subscribe to or are trialling an SVoD service

Figure 2.12

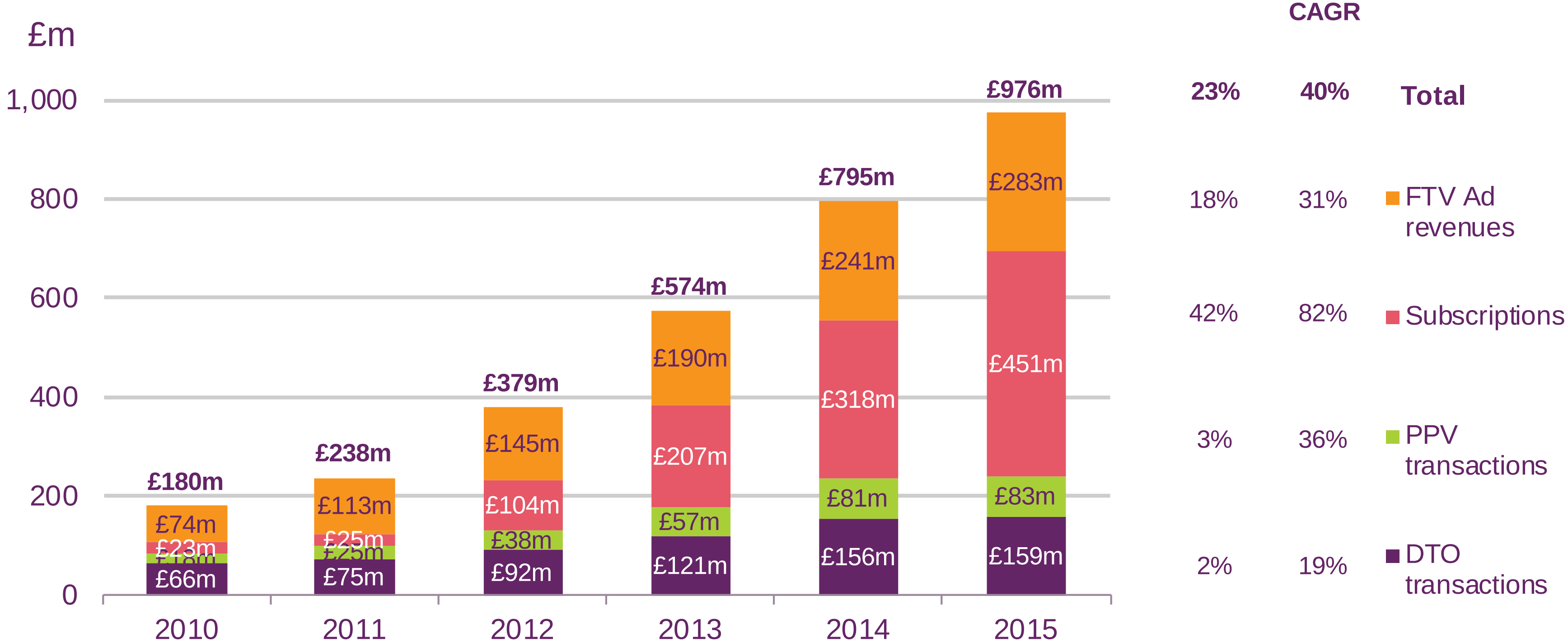
Total broadcast TV industry revenue, by source



Source: Ofcom/broadcasters. Note: Figures expressed in nominal terms and replace previous Ofcom revenue data for TV industry, owing to restatements and improvements in methodologies. 'Subscription revenue' includes Ofcom's estimates of Sky UK, Virgin Media, BT TV, TalkTalk and fees for broadcasting Channel 4 channels in HD as well as that of ESPN and Top Up TV in the UK where relevant (ROI revenue is excluded). Now TV revenues are not included in 2015 figures but are in previous years. It also excludes revenue generated by broadband and telephony. 'Other' includes TV shopping, sponsorship, interactive (including premium-rate telephony services), programme sales and S4C's grant from the DCMS. Totals may not equal the sum of the components due to rounding.

Figure 2.13

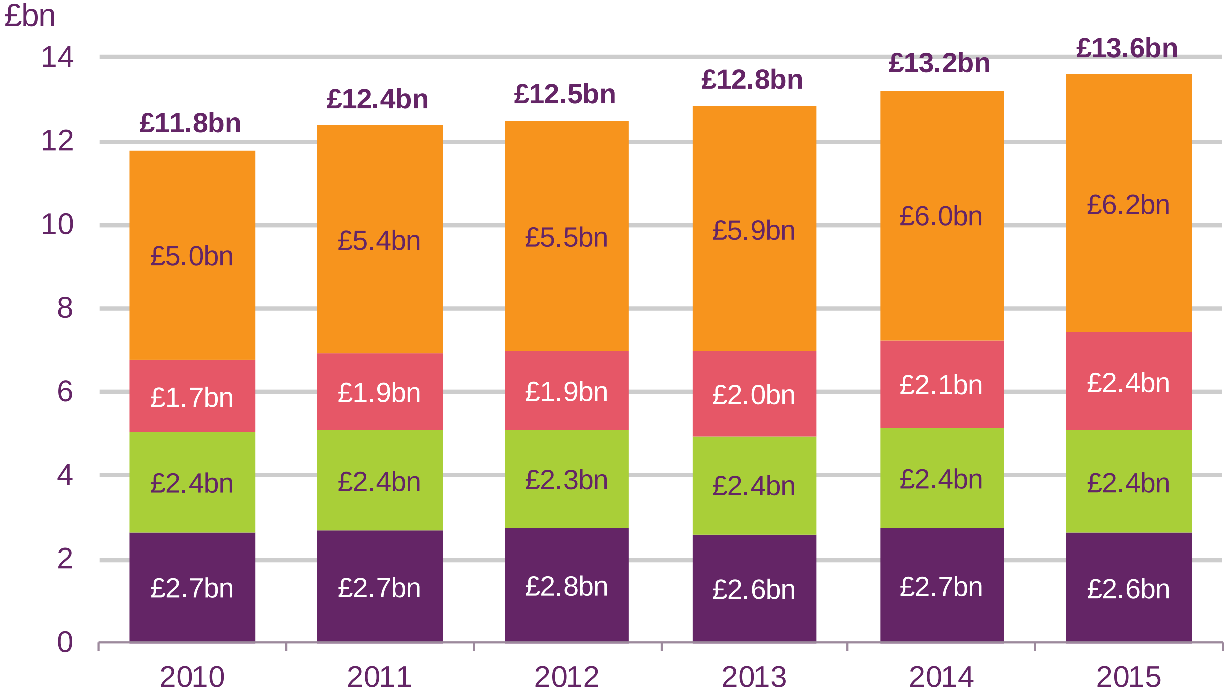
Online TV revenues



Source: IHS. All figures are nominal. FTV (free to view) revenues include advertising revenues only and include all services delivering online video free to the end consumer. Subscription includes digital-only subscribers and users of bundled services. PPV (pay-per-view) refers to a method of renting digital content and pay to watch it for a limited period including all content consumed on an on-demand basis. DTO (download-to-own) gives the customer ownership over the files they have downloaded. Includes only revenue from long form video content and excludes revenues generated from online user generated content.

Figure 2.14

Total TV industry revenue, by sector



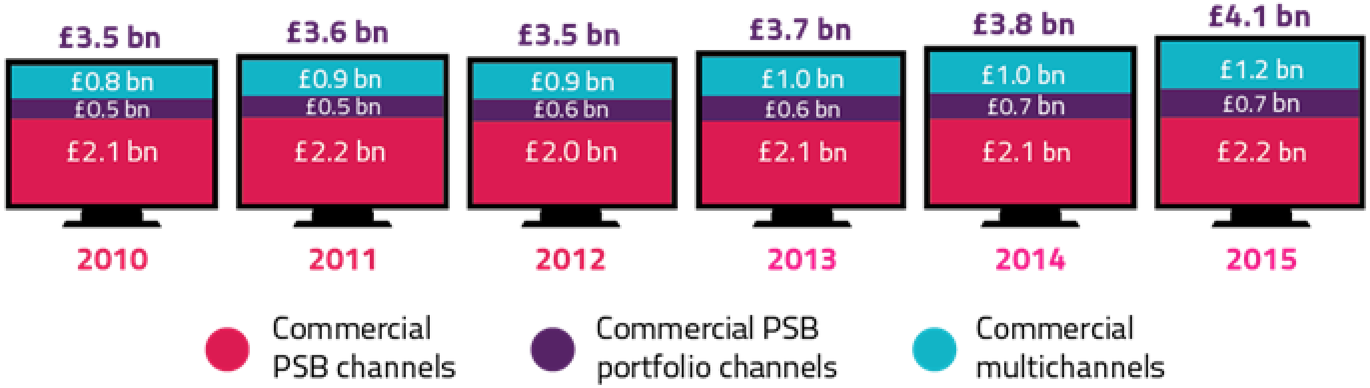
Growth

1 year	5 year CAGR	
3%	**3%**	**Total**
3%	4%	Platform operators
12%	6%	Commercial multichannels
1%	1%	Commercial PSB channels
-4%	0%	Publicly-funded channels

Source: Ofcom/broadcasters. Note: Figures expressed in nominal terms and replace previous Ofcom revenue data for TV industry, owing to restatements and improvements in methodologies. The platform operators are Sky UK, Virgin Media, BT TV and TalkTalkTV as well as, in previous years, ESPN and Top Up TV in the UK (Republic of Ireland revenue is excluded). Now TV revenues are not included in 2015 figures but are in previous years. Commercial PSB channels comprise ITV/ITV Breakfast, STV, UTV, Channel 4, Channel 5 and S4C. Commercial multichannels comprise all multichannels including the commercial PSB portfolio channels. Publicly-funded channels comprise BBC One, BBC Two, the BBC portfolio channels and S4C. The commercial revenues of S4C are included with the main commercial PSB channels while their licence fee revenue and DCMS grants come under publicly-funded channels. Totals may not equal the sum of the components due to rounding.

Figure 2.15

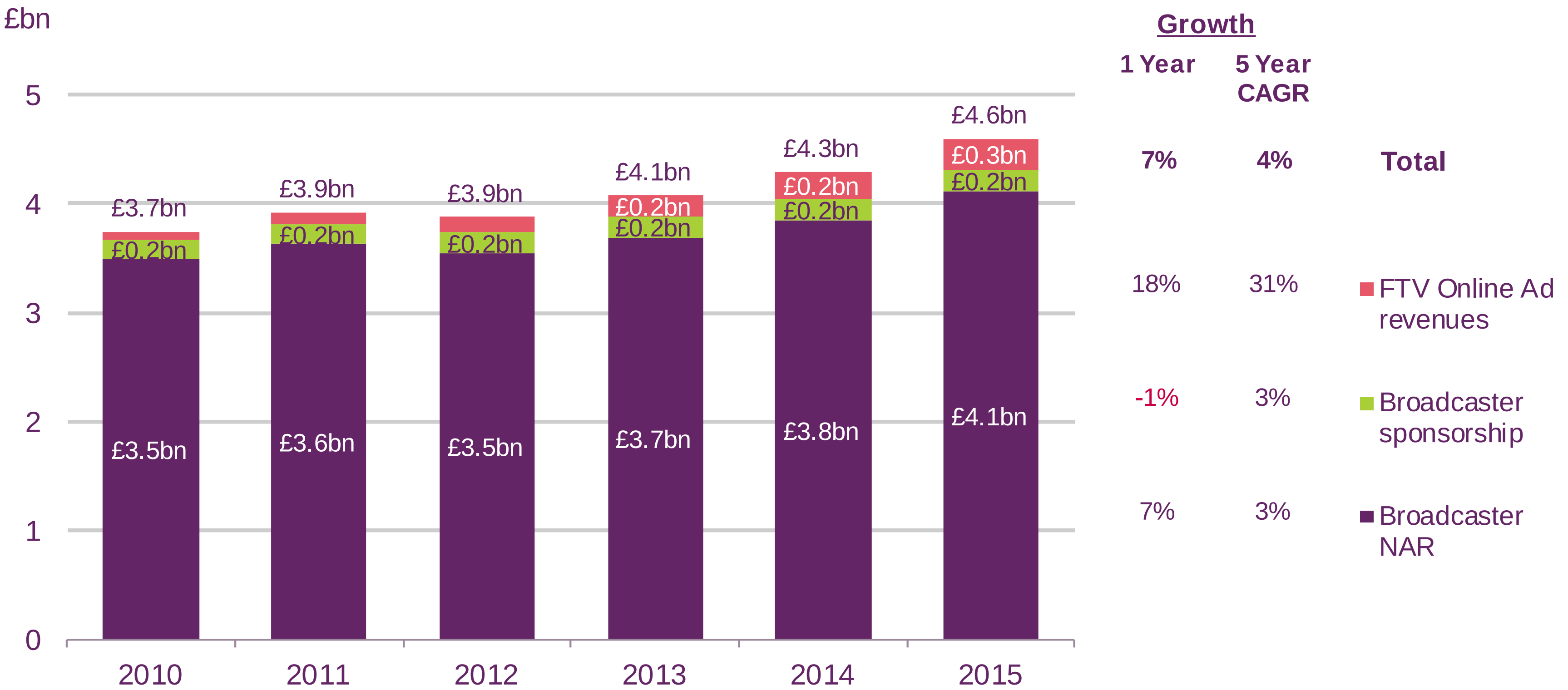
TV net advertising revenues, by source: 2010-2015



Source: Ofcom/broadcasters. Note: Figures expressed are in nominal terms and replace previous data published by Ofcom. Commercial PSB channels comprise ITV, STV, UTV, ITV Breakfast, Channel 4, Channel 5 and S4C (and their '+1' channels); Commercial PSB portfolio channels include, where relevant, ITV2, ITV3, ITV4, CITV, ITVBe, ITV Encore, ITV Breakfast 2, E4, More 4, Film 4, 4Seven, Five USA, 5 and Spike (and their '+1' channels). For previous years closed channels have also been included. Sponsorship revenue not included. Totals may not equal the sum of the components due to rounding.*

Figure 2.16

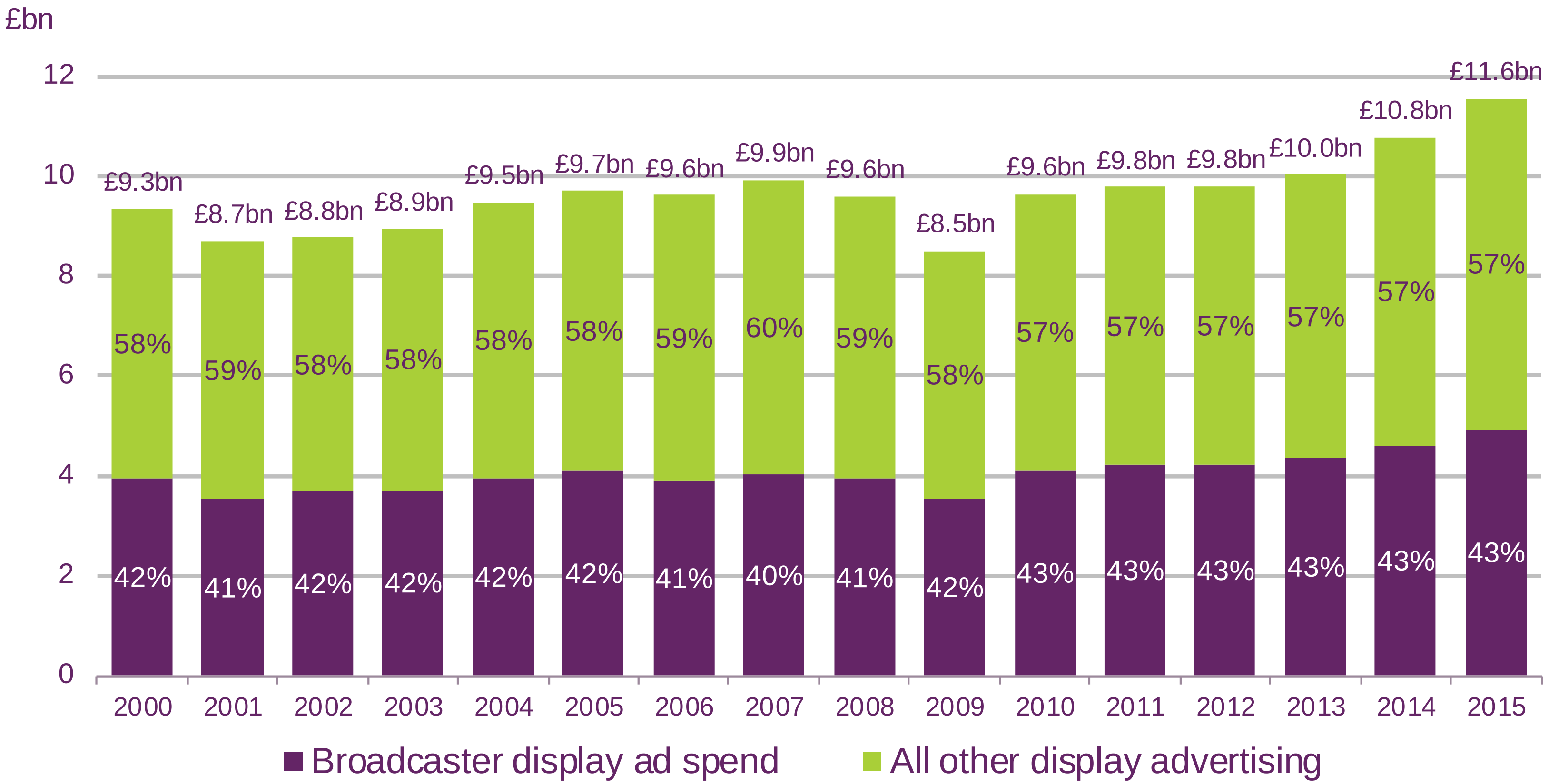
Total cross-platform advertising and sponsorship revenue



Source: Ofcom/broadcasters/IHS. All figures are nominal.

Figure 2.17

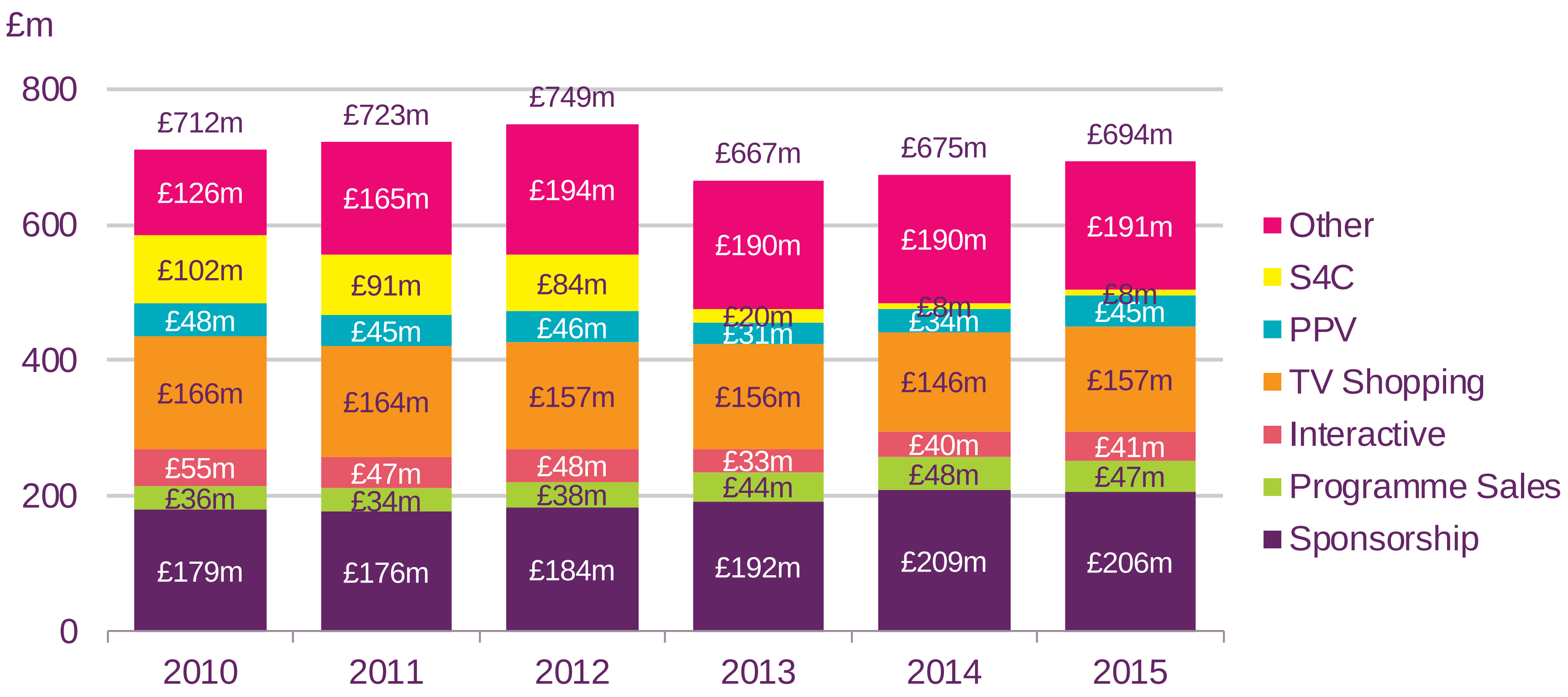
Broadcaster percentage share of all display advertising expenditure



Source: AA/Warc Expenditure Report.
Note: Total display advertising expenditure includes television ads, TV sponsorship, TV VoD, radio, out of home, cinema, national and regional press display, internet and consumer magazines, but does not include response advertising such as direct mail or classified ads. Broadcaster display ads include advertising, sponsorship and online VoD ad revenue. Figures are net of discounts, and include agency commission, but excludes production costs. Figures are nominal.

Figure 2.18

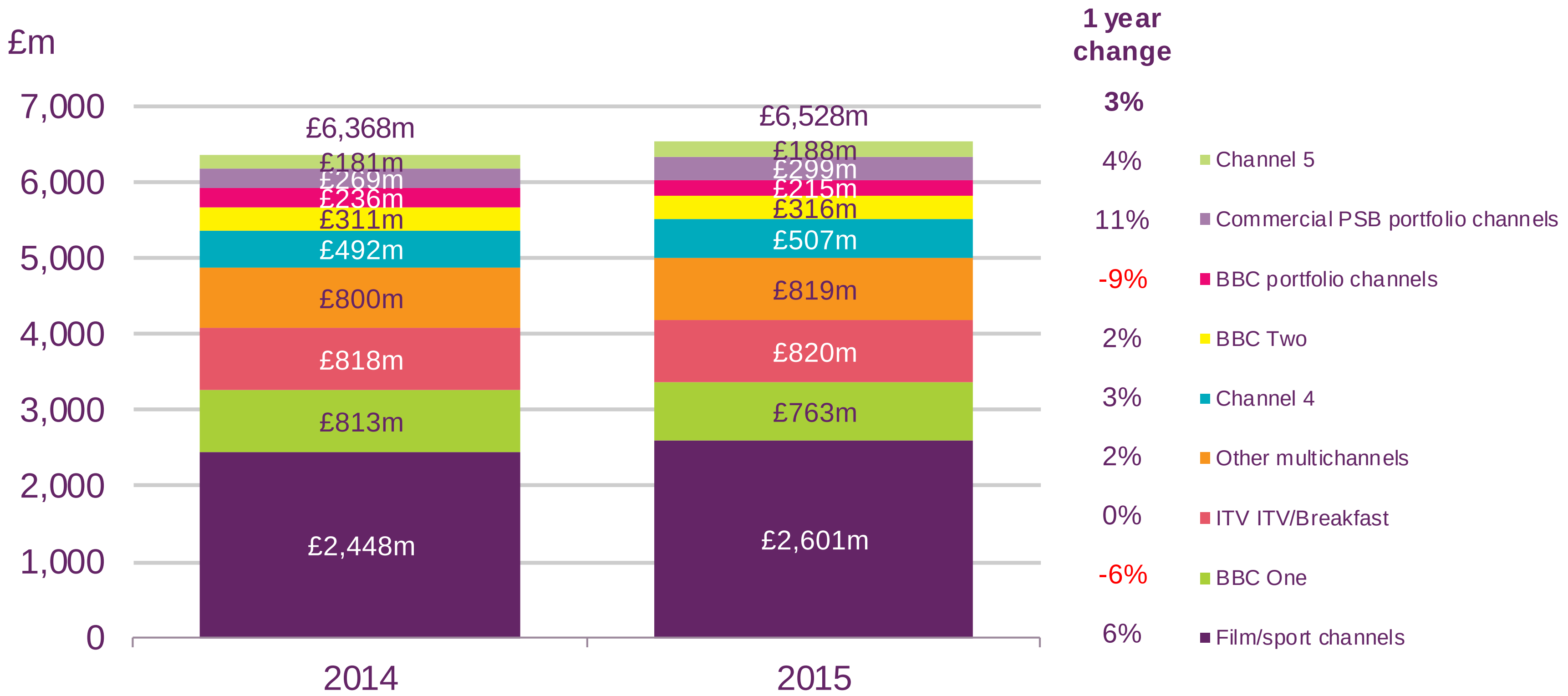
Breakdown of 'other' commercial TV channel revenue: 2010-2015



Source: Ofcom/broadcasters. 'TV shopping' represents aggregate operating margin of products sold via television. A funding agreement which was reached in April 2013 meant that the majority of S4C funding now comes out of the BBC's licence fee income. Totals may not equal the sum of the components due to rounding. Owing to the nature of these revenue components, annual changes may be a function of a higher number of broadcaster returns being made by the time of writing, rather than material changes in the contributions that these revenue components are making to total industry income.

Figure 2.19

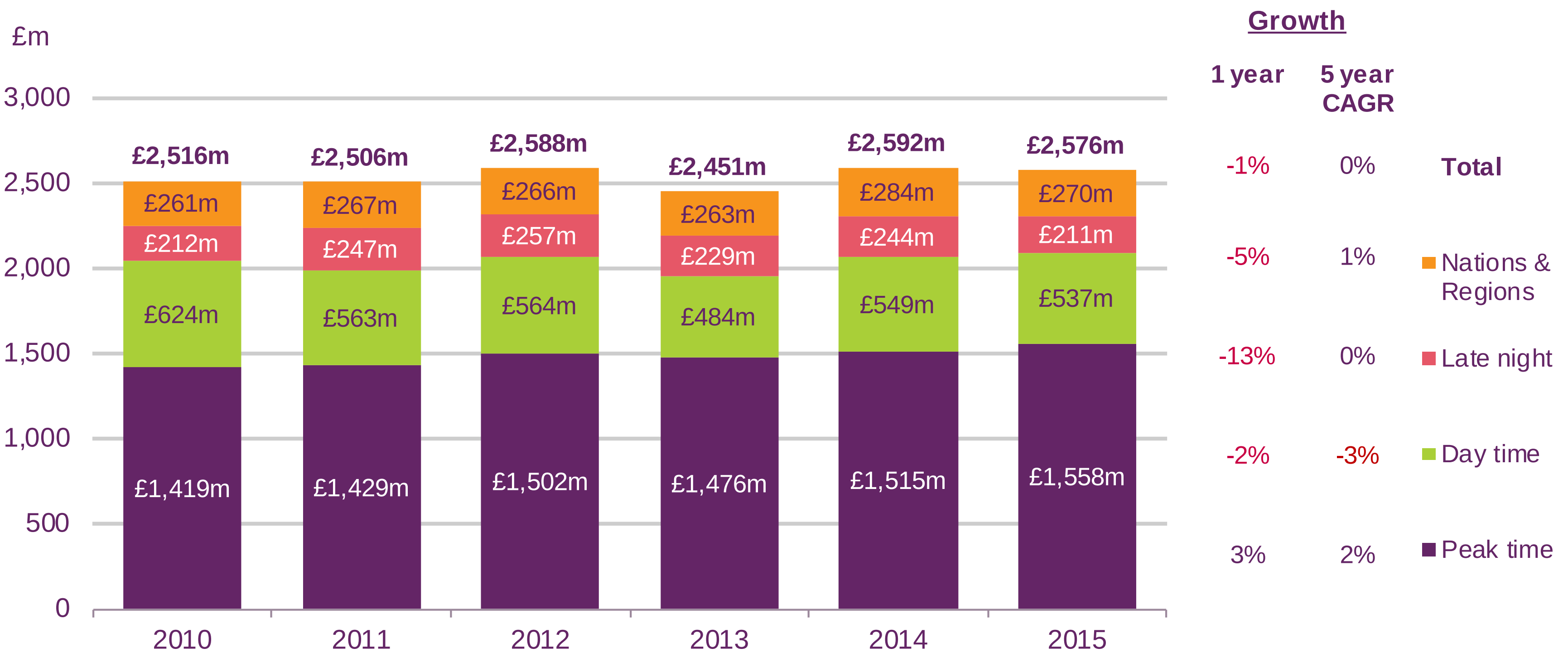
Spend on network TV programmes: 2014 - 2015



Source: Ofcom/broadcasters. Note: Figures expressed in nominal prices. Figures do not include spend on nations' and regions' output. BBC portfolio channels includes BBC Three, BBC Four, BBC News, BBC Parliament, CBBC and CBeebies (but not BBC HD). 'Other multichannels' include main channel genres (excluding sports and films). Programme spend comprises in-house productions, commissions from independents, acquired programmes and repeats (originations and acquisitions).

Figure 2.20

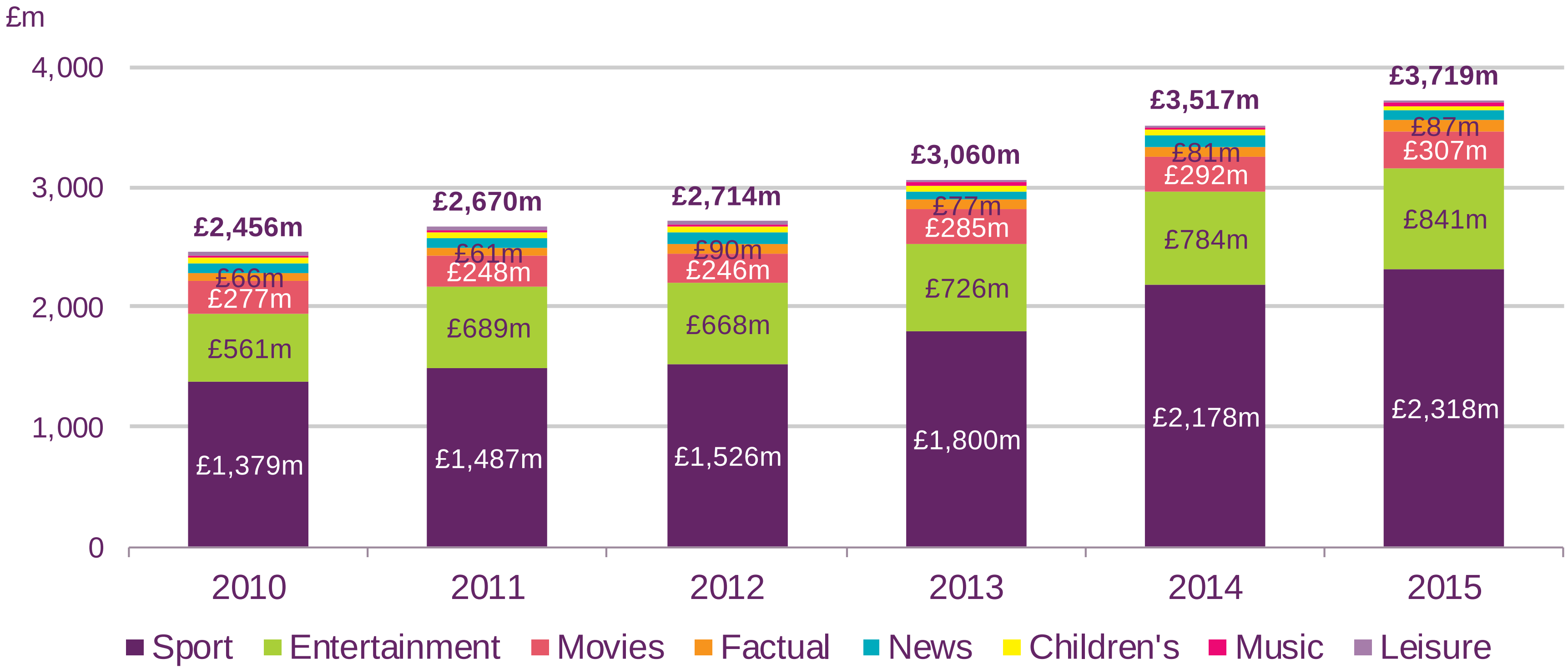
Spend on first-run UK originated output on the five main PSB channels



Source: Ofcom/broadcasters. Note: Figures are expressed in nominal terms. They include ITV breakfast, spending in the nations and regions on English-language programming (and a small amount of Irish-language programmes) but not the BBC portfolio channels, BBC Alba or S4C.

Figure 2.21

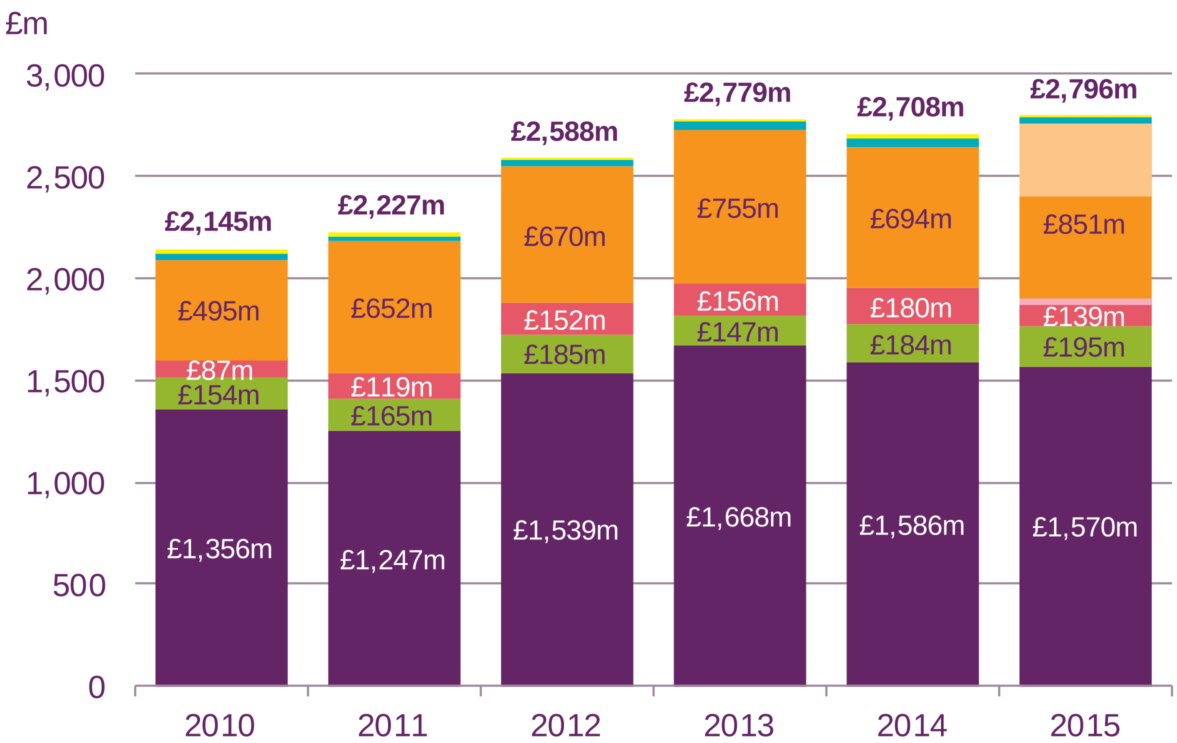
Multichannel content spend in key genres: 2010-2015



Source: Ofcom/broadcasters. Note: Spend expressed in nominal terms. Excludes BBC portfolio channels but includes commercial PSB portfolio channels.

Figure 2.22

Independent producer TV-related revenues



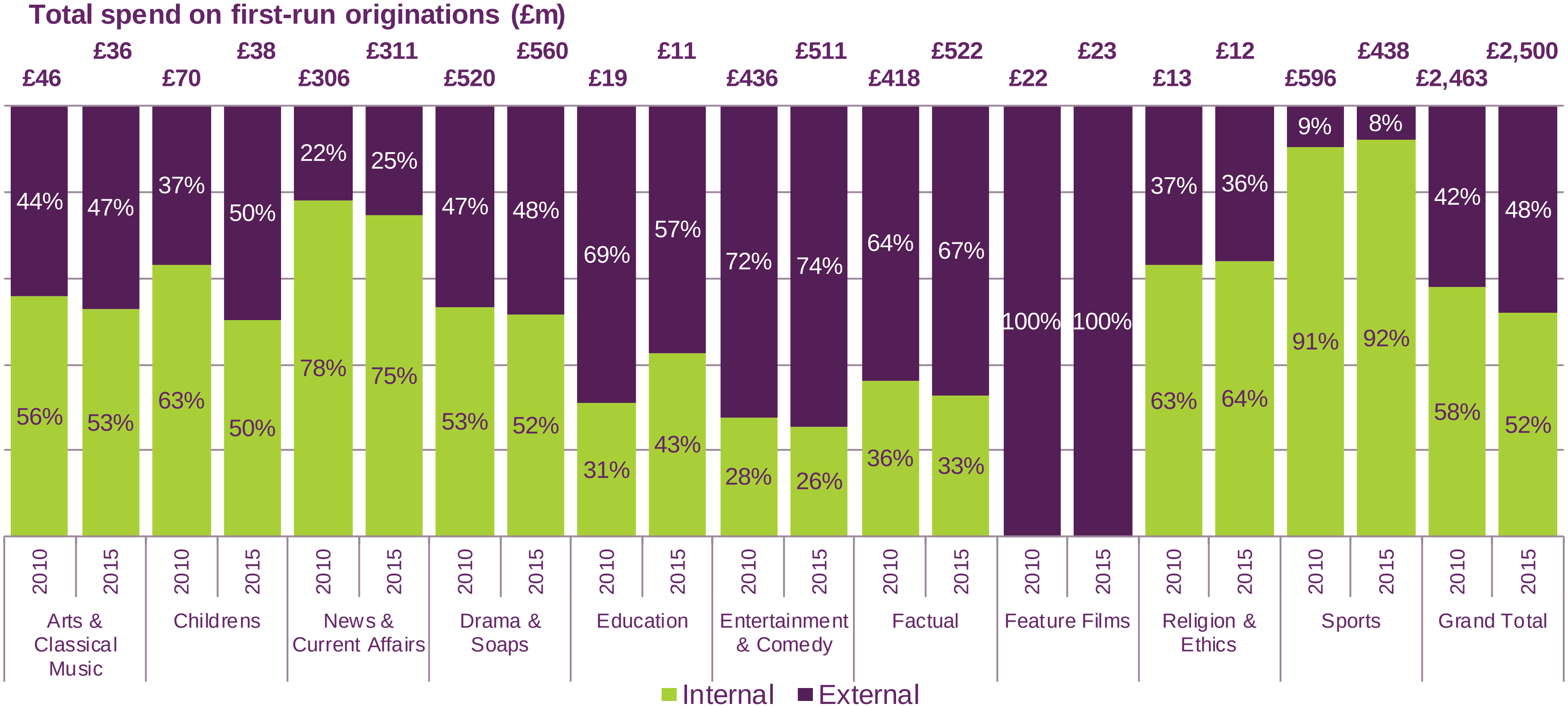
Growth

1 year	5 year CAGR	
3%	5%	**Total**
-60%	-18%	Other UK
-21%	3%	Pre-production
23%	11%	Other international income
-23%	10%	International sales of UK finished programmes
6%	5%	UK rights income
-1%	3%	Primary UK commissions

Source: Pact Independent Production Sector Financial Census and Survey 2016. Note: 'Other international income' refers to revenue from companies overseas operations and any primary commissions received from non-UK broadcasters; 'International sales of UK finished programmes': sales of first-run UK programming sold as finished product abroad; 'UK rights income': UK secondary sales, publishing, formats, DVD sales etc. There was a change in reporting methodology of some of the sampled companies in 2015. To help reflect the market Pact have used reported average year-on-year growth figures to forecast international sales on a like-for-like basis from the previous year. Forecast sales for 2015 were £347m for 'other international income' and £34m for 'international sales of UK finished programmes' in 2015, both of which are represented by the lighter shade in the above chart.

Figure 2.23

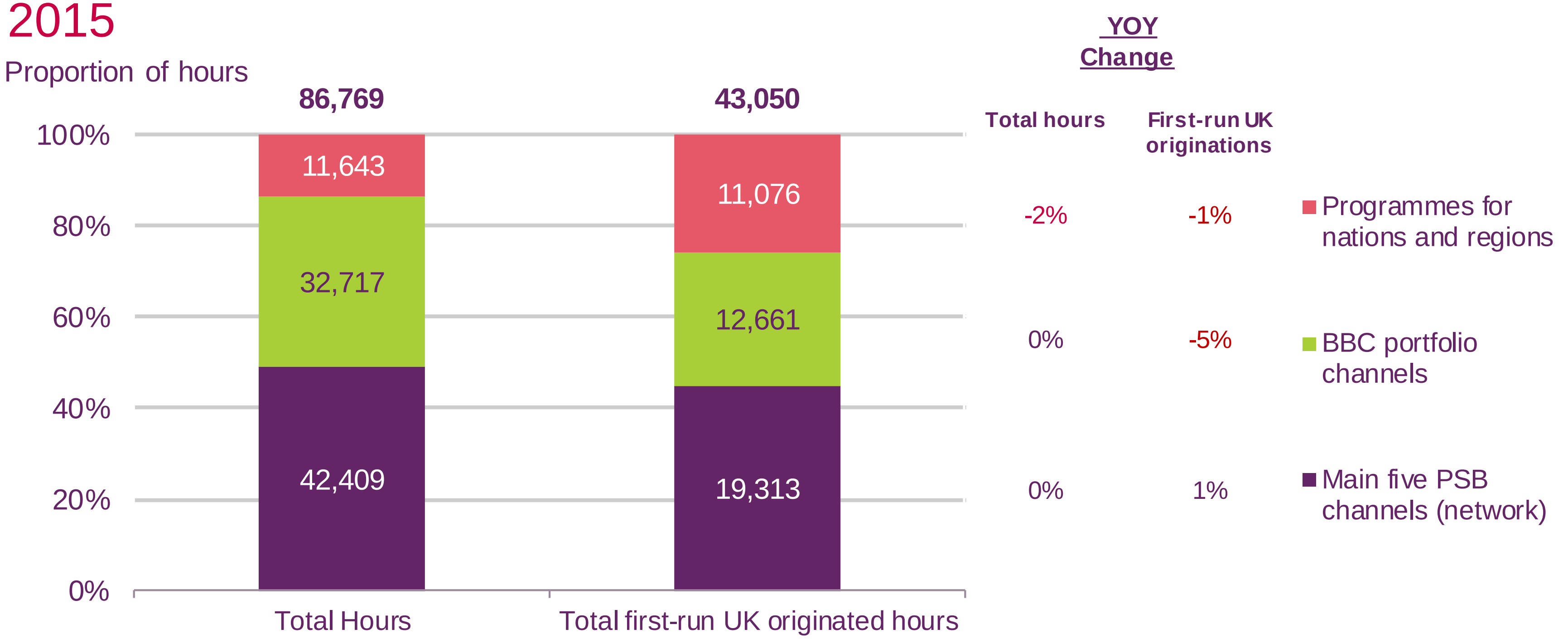
Relative share of spend on first-run originated content by genre, in-house vs. external producers: 2010 and 2015



Source: Ofcom/broadcasters. Note: Figures are expressed in nominal terms. Includes spend by the main five PSB channels and BBC portfolio channels on first-run originated content broadcast, all day, and excludes nations'/regions' output.

Figure 2.24

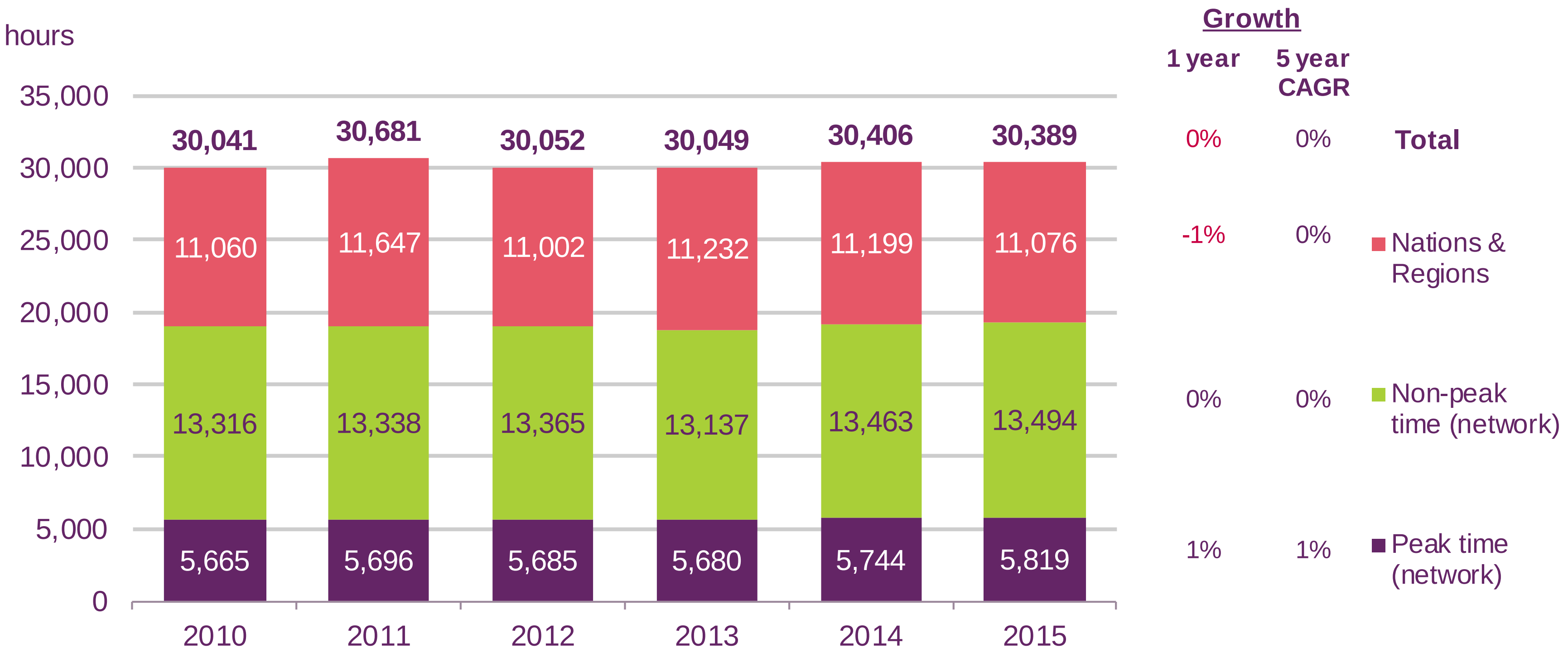
Total and first-run UK originated hours of output on the PSB channels: 2015



Source: Ofcom/broadcasters. Note: ITV Breakfast is included within the figures for the main five channels. Regional hours exclude Welsh and Gaelic-language programming but include a small amount of Irish-language programmes.

Figure 2.25

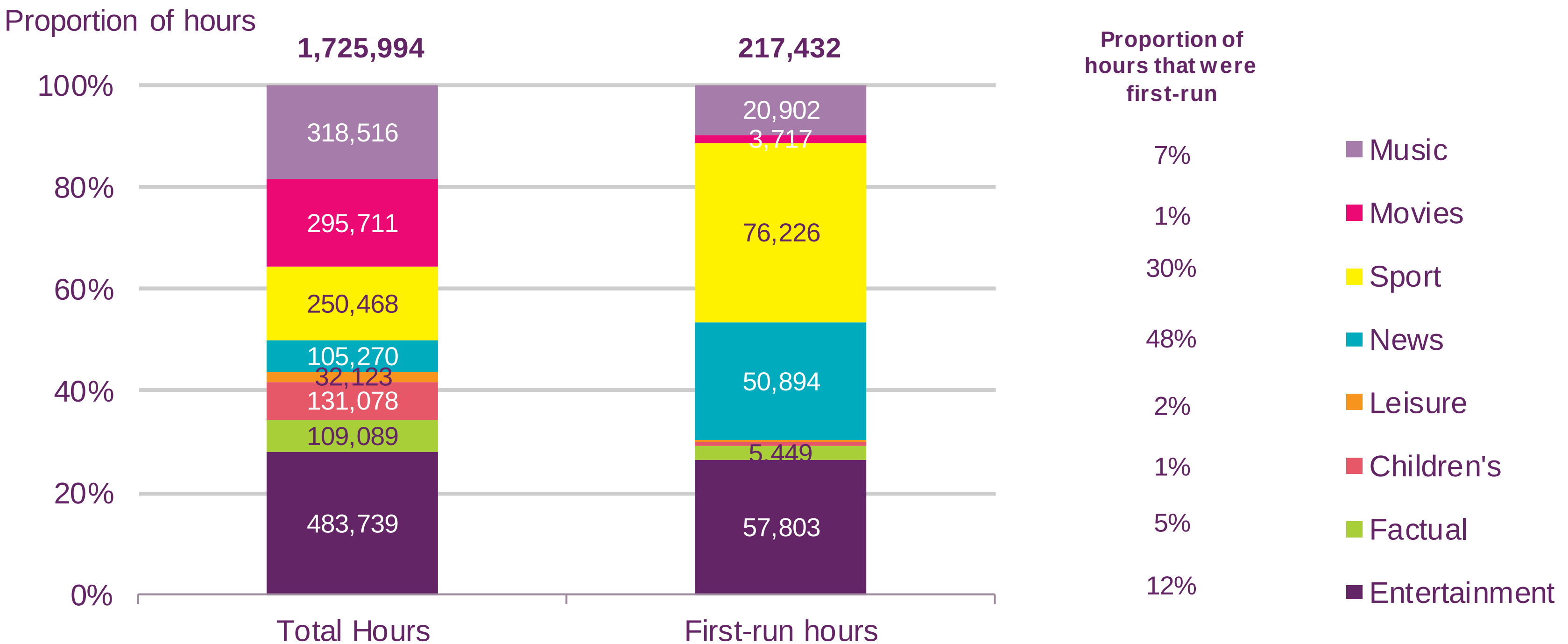
Hours of first-run UK originated output on the five main PSB channels



Source: Ofcom/broadcasters. Note: Figures include ITV breakfast and a small amount of Irish-language programmes but do not include the BBC's portfolio channels, BBC Alba or S4C.

Figure 2.26

Total and first-run originated/acquired hours of output in the multichannel sector: 2015



Source: Ofcom/broadcasters. Note: Broadcast hours exclude Sky Box Office and 'barker' channels which promote TV content. First-run hours include first-run in-house, commissioned and acquired content.

Figure 2.27

Summary of retail offerings from traditional pay-TV providers

Provider (Q4 2015 subscribers)	Retail offering
BT TV YouView (1.4 million)	• **Overview**: BT TV only available when bundled with BT broadband and fixed line. YouView box included. Choice of three TV packages, all including the AMC channel. • **Movies**: Sky Movies can be added to all TV packages. • **Sports**: All packages include BT Sport channels. Customers can add Sky Sports 1 & 2. • **VoD/out-of-home**: All packages include catch-up TV. BT TV App allowing out-of-home viewing included in some packages. • **Technological developments**: BT launched the first Ultra-HD channel in August 2015.
Sky (11.3 million)	• **Overview**: Range of DSat TV packages available standalone or bundled with Sky broadband and fixed line. All packages include Sky entertainment channels. Packages come with Sky+ HD box or Sky Q box. Sky also retails OTT through NOW TV. • **Movies**: All Sky Movies channels available. • **Sports**: All Sky Sports channels available. Sky customers can also access BT Sport by subscribing to BT. • **VoD/out-of-home**: All TV bundles include catch-up TV and out-of-home viewing through Sky Go. • **Technological developments**: Sky launched a new Sky Q set-top box in 2016 with UHD capability and which allows viewers to continue watching programmes on different devices and screens as they wish. It is planning to launch a DTT-enabled Now TV set-top box later this year.

Provider (Q4 2015 subscribers)	Retail offering
TalkTalk TV YouView (1.4 million)	• **Overview**: TalkTalk TV packages only available when bundled with TalkTalk broadband and fixed line. YouView box included. Choice of two TV packages, one of which includes six Sky channels. Various content “Boosts” available through both packages. • **Movies**: Sky Movies channels available through Sky Movies Boost. • **Sports**: Sky Sports channels available through Sky Sports Boost. TalkTalk customers can access BT Sport by subscribing to BT. • **VoD/out-of-home**: Both packages include catch-up TV and out-of-home viewing through TV2Go App.
Virgin Media (3.7 million)	• **Overview**: Range of TV packages available standalone or bundled with Virgin Media broadband and fixed line. TiVo box included. • **Movies**: Sky Movies channels available. Some packages include them as standard, whereas other packages allow add-on purchases. • **Sports**: All Sky Sports and BT Sport channels available. Some packages include them as standard, whereas other packages allow add-on purchases. • **VoD/out-of-home**: All TV packages include catch-up TV and out-of-home viewing through Virgin TV Anywhere. • **Technological developments**: Virgin Media has announced that it will launch a new, TiVo-powered set-top box later this year that will introduce UHD streaming capabilities.

Source: Providers’ websites. Subscriber numbers are from Enders Analysis, with Sky figures including Now TV, Republic of Ireland and business overseas.

Figure 2.28

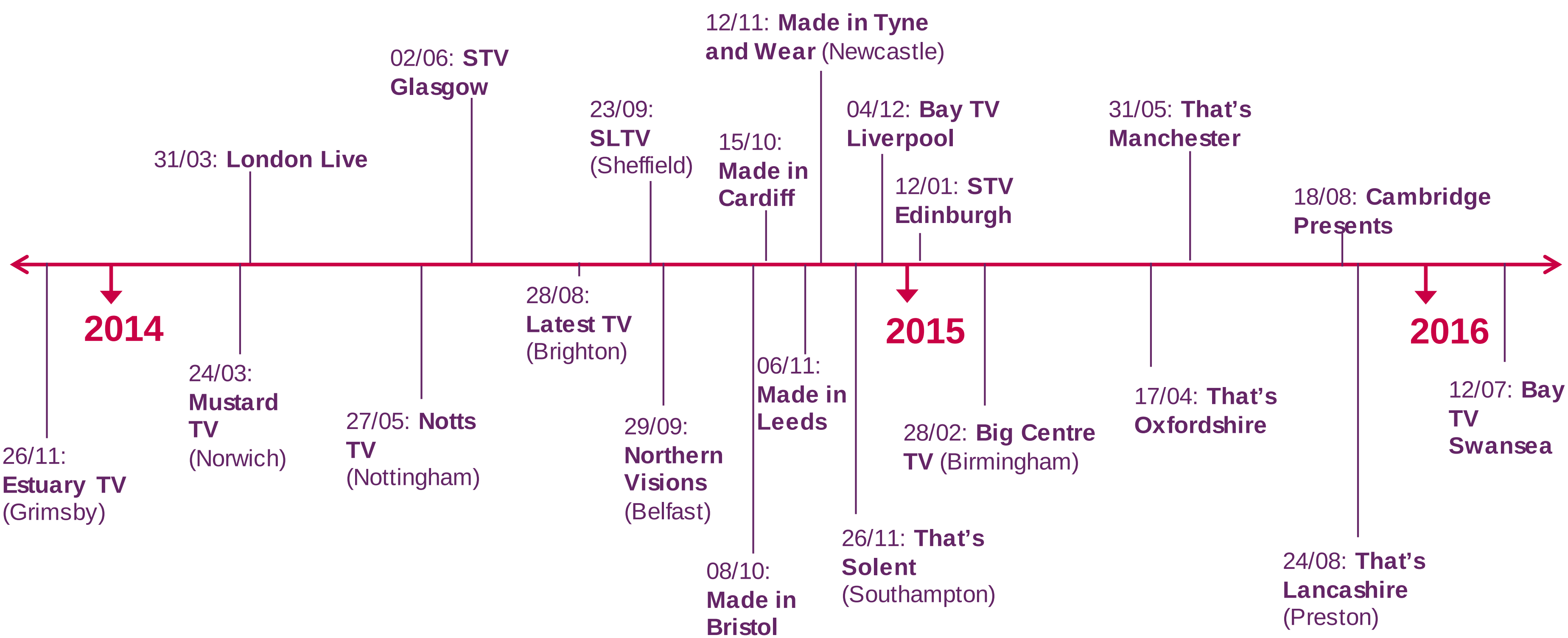
Summary of Sky Sports and BT Sport availability from pay-TV providers

	BT TV (YouView)	Sky (DSat)	TalkTalk YouView	Virgin Media	Other
Sky Sports 1&2	✓	✓	✓ (no HD)	✓	×
Sky Sports 3, 4, 5 & F1	×	✓	✓ (no HD)	✓	×
NOW TV (Sky Sports passes)	×	×	×	×	✓ EE TV
BT Sport Pack (all BT Sport channels)	✓	✓ (BT retails)	✓ (BT retails)	✓	×
BT Sport Lite (BT Sport 1 only)	✓	✓ (BT retails)	×	×	×

Source: Providers' websites.

Figure 2.29

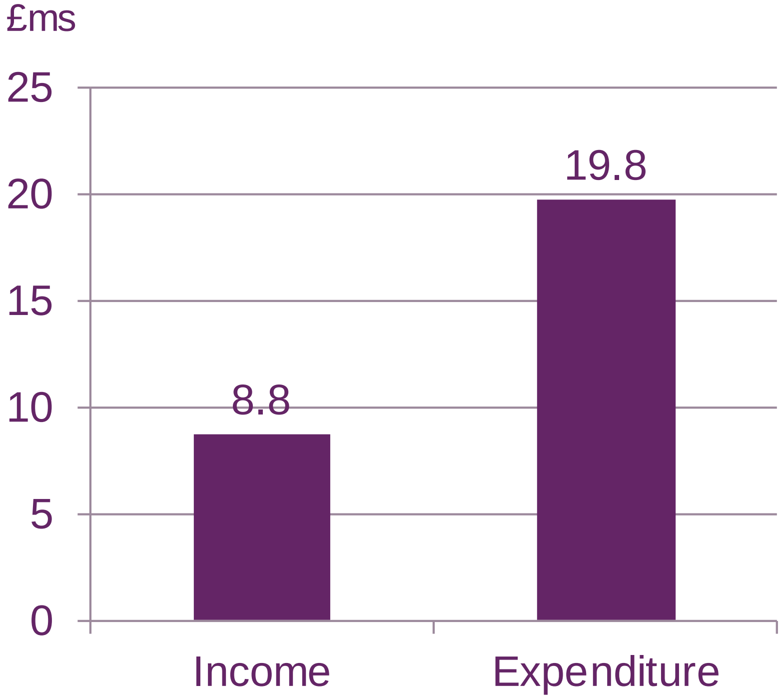
Launch dates of Local TV services

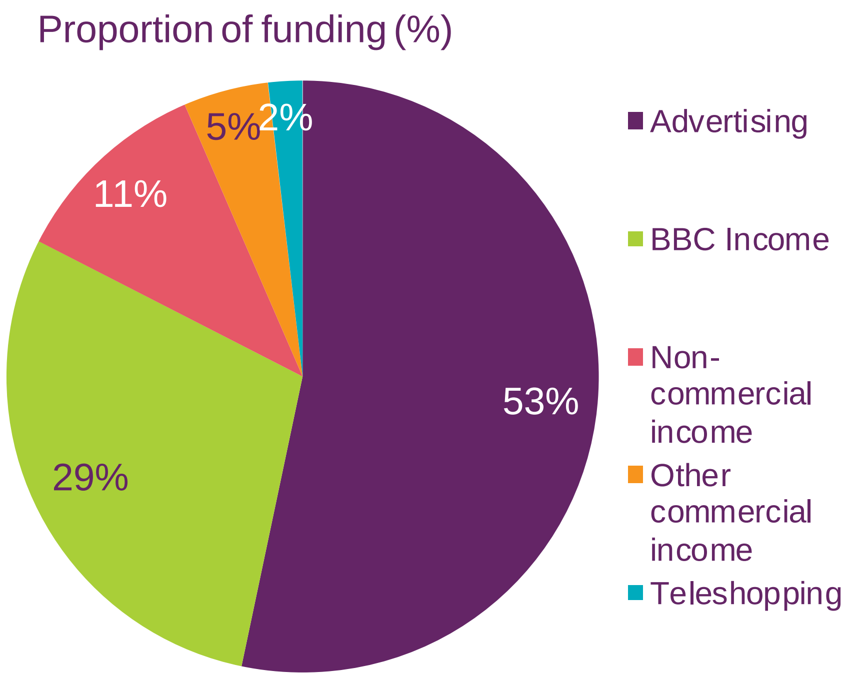


Source: Ofcom

Figure 2.30

Income and expenditure information for local TV services broadcasting in 2015

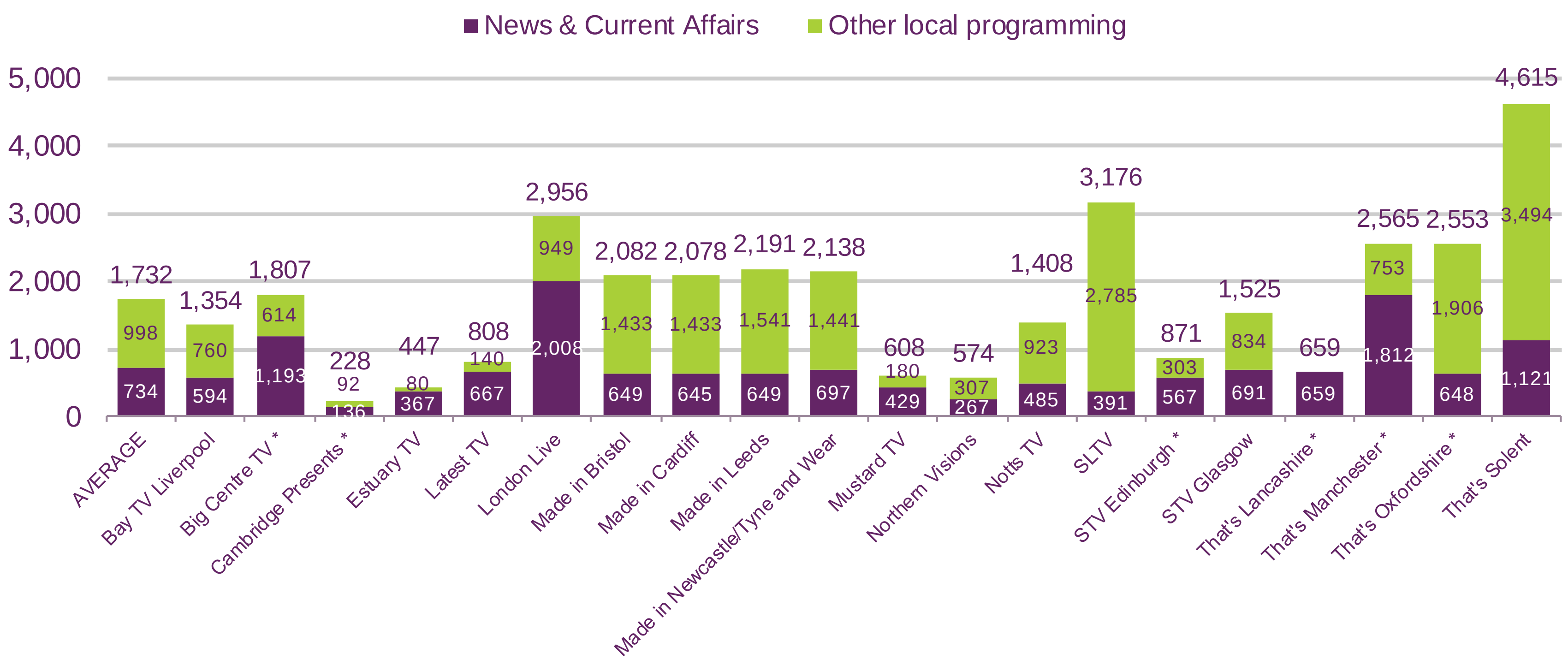




Source: Ofcom/broadcasters. Includes services which launched in 2015.

Figure 2.31

Hours of first-run local programming on local TV services: 2015



Source: Ofcom/broadcasters. Figures calculated on the basis of the hours that were required in 2015 according to the licence, with the addition of the average weekly over-delivery reported by the service in its local return. * indicates channels that launched during 2015.

Figure 2.32

Platform availability of local TV services broadcasting in 2015

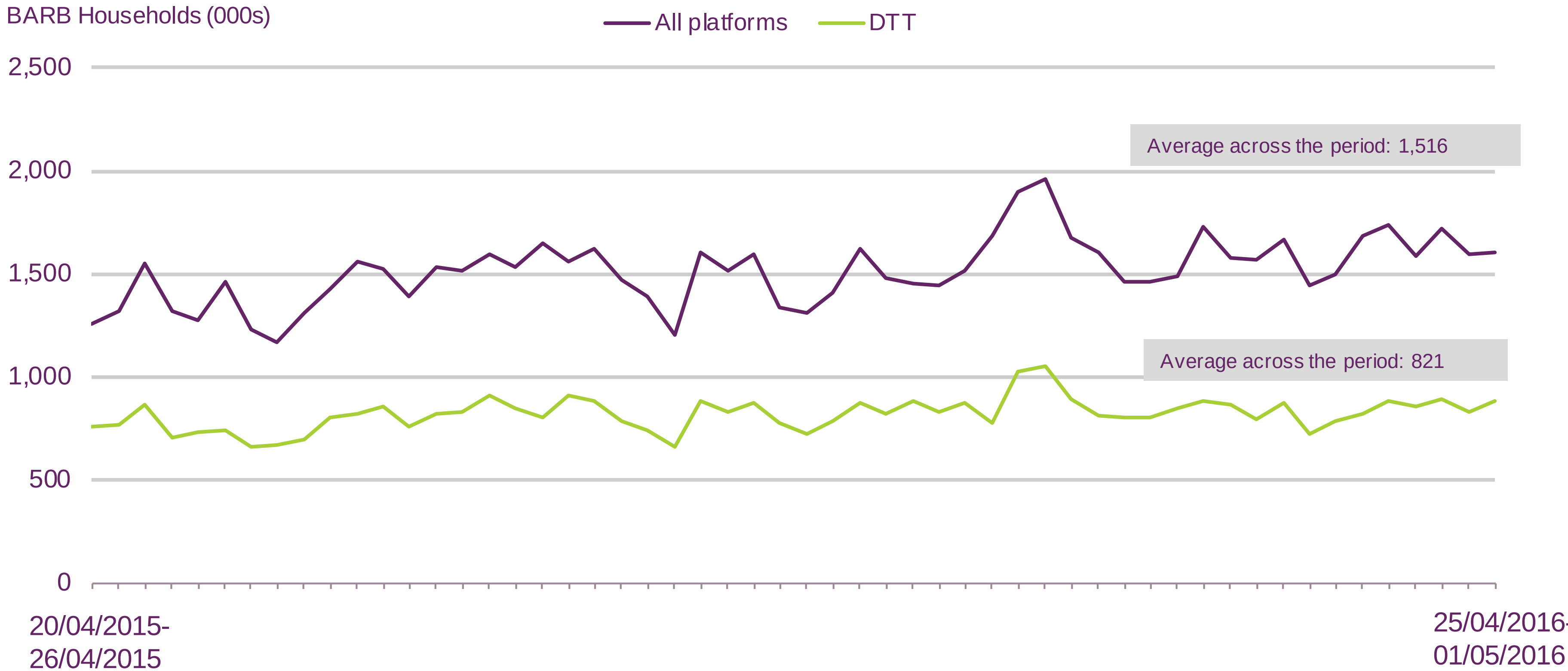
Channel	Virgin Media	Sky	Internet	DTT
London Live	✓	✓	✓	✓
Made in Leeds	✓	✓	✓	✓
STV Glasgow	✓	✓	✓	✓
Made in Tyne and Wear (Newcastle)	✓	✓	✓	✓
STV Edinburgh	✓	✓	✓	✓
Made in Cardiff	✓	✓	✓	✓
Made in Bristol	✓	✓	✓	✓
Notts TV (Nottingham)	✓	✓	✓	✓
Big Centre TV	✓		✓	✓
Bay TV Liverpool	✓		✓	✓

Channel	Virgin Media	Sky	Internet	DTT
Estuary TV (Grimsby)	✓		✓	✓
SLTV (Sheffield)	✓		✓	✓
Mustard TV (Norwich)	✓		✓	✓
Northern Visions (Belfast)	✓		✓	✓
Latest TV (Brighton)	✓		✓	✓
Cambridge Presents	✓		✓	✓
That's Manchester				✓
That's Solent (Southampton)				✓
That's Oxford				✓
That's Lancashire (Preston)				✓

Source: Ofcom/broadcasters. ✓ indicates availability on platform.

Figure 2.33

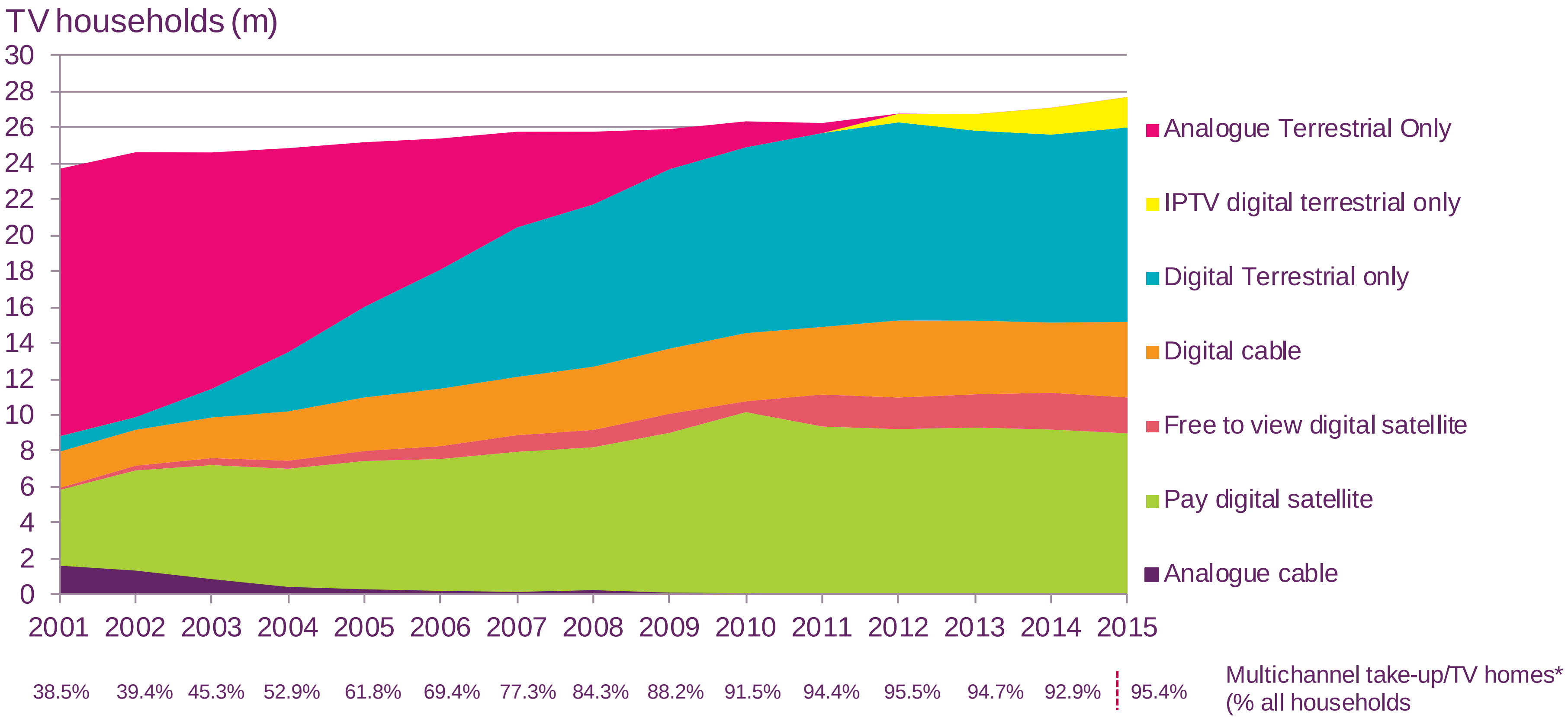
Average weekly three-minute reach (000s) of local TV stations: April 2015 – April 2016



Source: BARB, all homes. Based on viewing through the reception mode of DTT and all platforms (DTT, DSAT, DCAB and Other). Full weeks are used for the correct calculation of weekly averages.

Figure 2.34

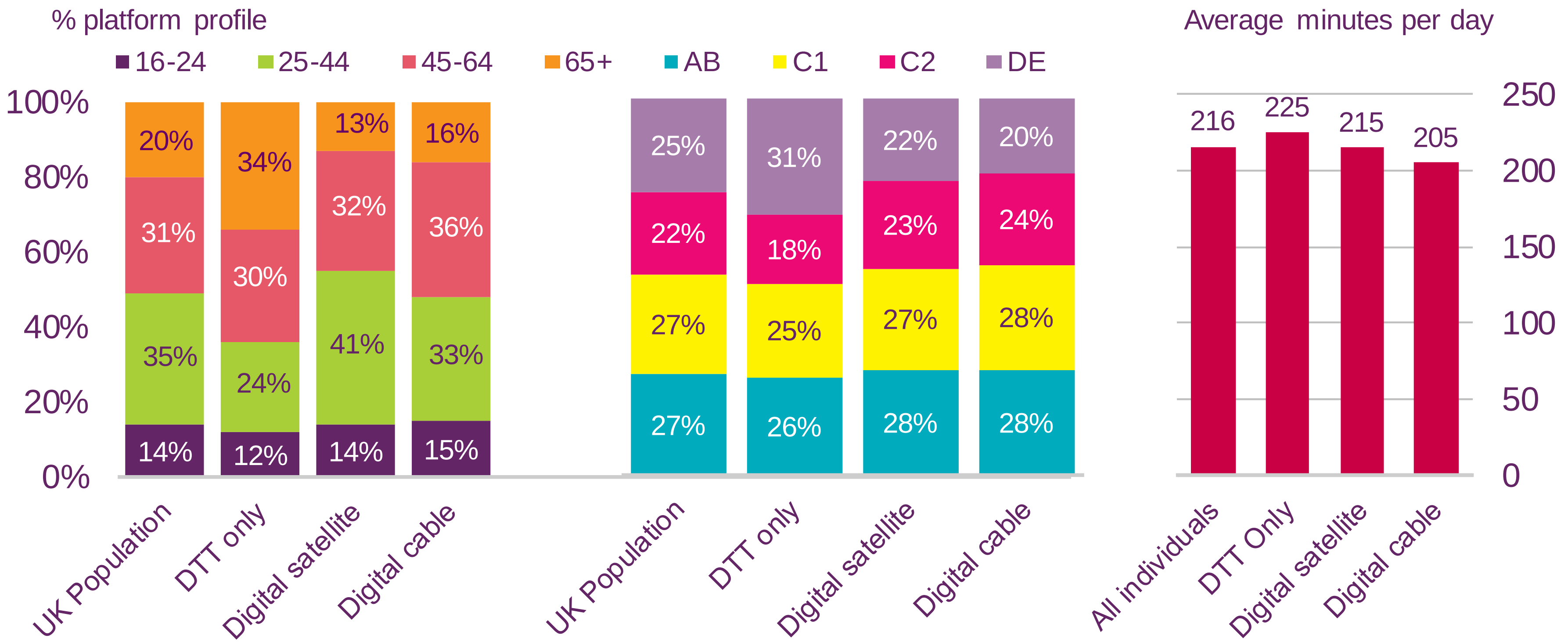
Platform take-up: 2001-2015



Source: BARB Establishment Survey. Household level data based on all TV sets in home therefore there may be platform overlaps. Data points are based on Q4 of each year.
Notes: From Q4 2015 BARB changed its methodology and its definition of a TV set-owning household. The main change was that up to Q4 2015 a home was defined as a TV home if it owned a TV set which had been used to watch TV programmes in the last six months. Since Q4 2015 the claimed usage element was removed, which led to an increase in the TV set homes population. BARB did not re-state the TV homes population before the methodology change, so comparisons with previous data should be made with caution.
*Digital switchover was completed across the UK in October 2012. Data from 2013 therefore refers to TV households as a % of all households.
Digital terrestrial TV = digital TV through an aerial (this could include Freeview, BT TV/ TalkTalk/ YouView) and not through DSAT/DCAB or other platforms.
IPTV digital terrestrial only = receives digital terrestrial TV through any of BT TV/ TalkTalk/ YouView (but may have Freeview integrated TV) and not DSAT/DCAB/other platforms.

Figure 2.35

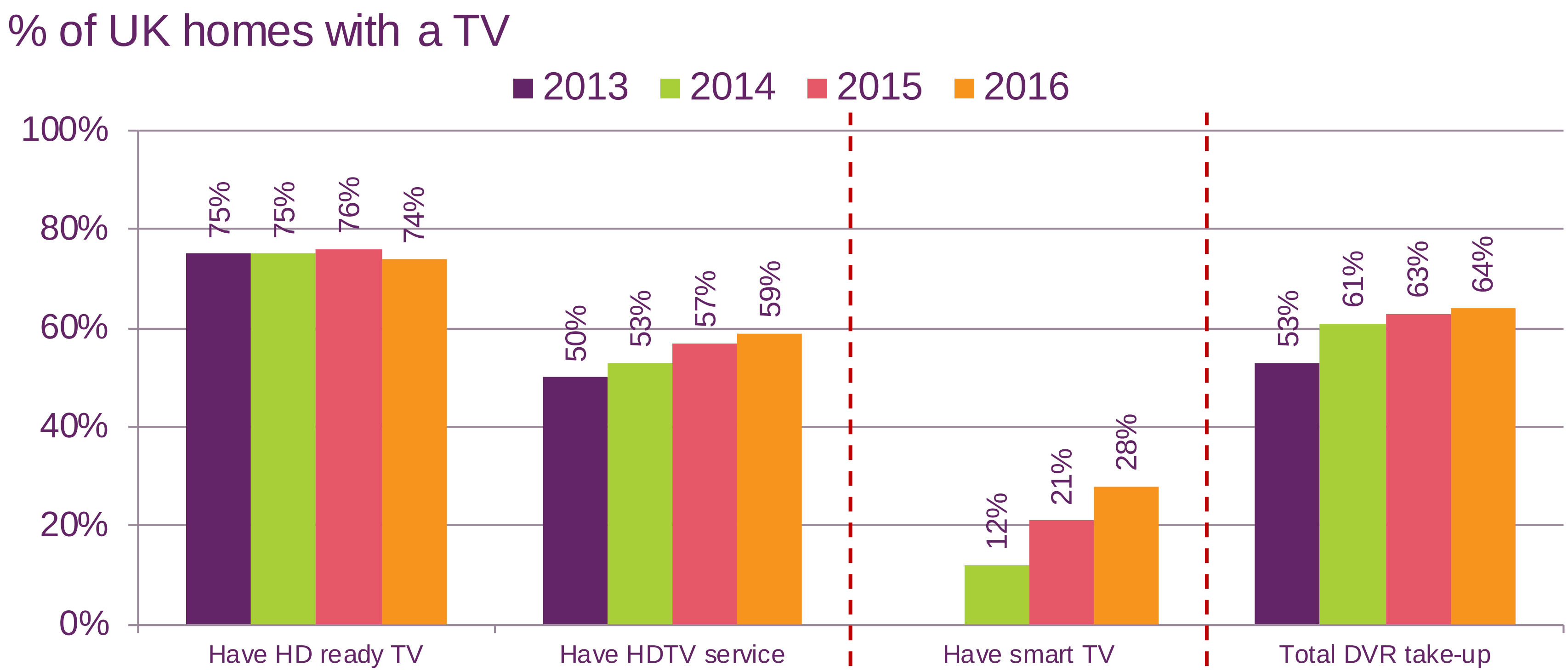
Platform demographics by age, socio-economic group and viewing hours



Source: Platform profile: Ofcom Technology Tracker H1 2016. Average minutes: BARB 2015 data.

Figure 2.36

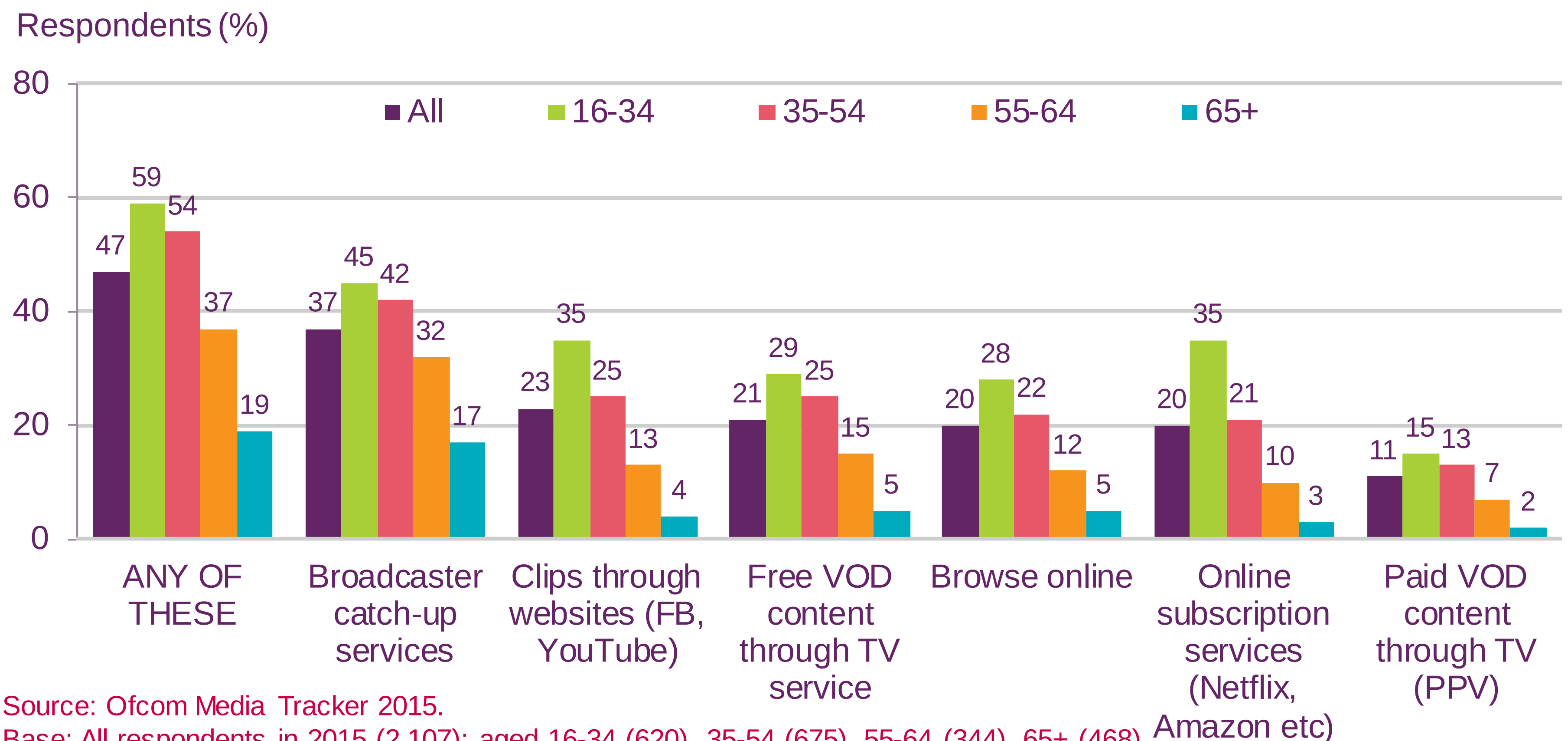
Take-up of HDTV sets and HD services, smart TVs and DVRs



Source: Ofcom Technology Tracker, data as at Q1 2014, then H1 2015-2016
Base: All adults aged 16+ with a TV in the household: 2013 (3661), 2014 (3635), 2015 (3616), 2016 (3606)
QH53: Is the main TV in your household an HDTV set or HD ready? / QH54: Although you have an HDTV-ready set, to actually watch TV channels and programmes that are broadcast in high definition, you need an HD set-top box or a TV with built-in HDTV receiver. For the main TV set, does your household have an HDTV service - from either Sky, Virgin Media, Freesat or Freeview?
QH62: Are any of your TV sets 'smart TVs'?
QR1A: Does your household have Sky+? / QR1B: Does your household have Virgin TiVo (pronounced tee-vo) or V+? / QR1C/D/E: Does your Freesat/ Freeview box of Freeview TV/ broadband TV service allow you to record and store TV programmes, and also pause and rewind live TV programmes?

Figure 2.37

Activities undertaken on a connected TV, by age

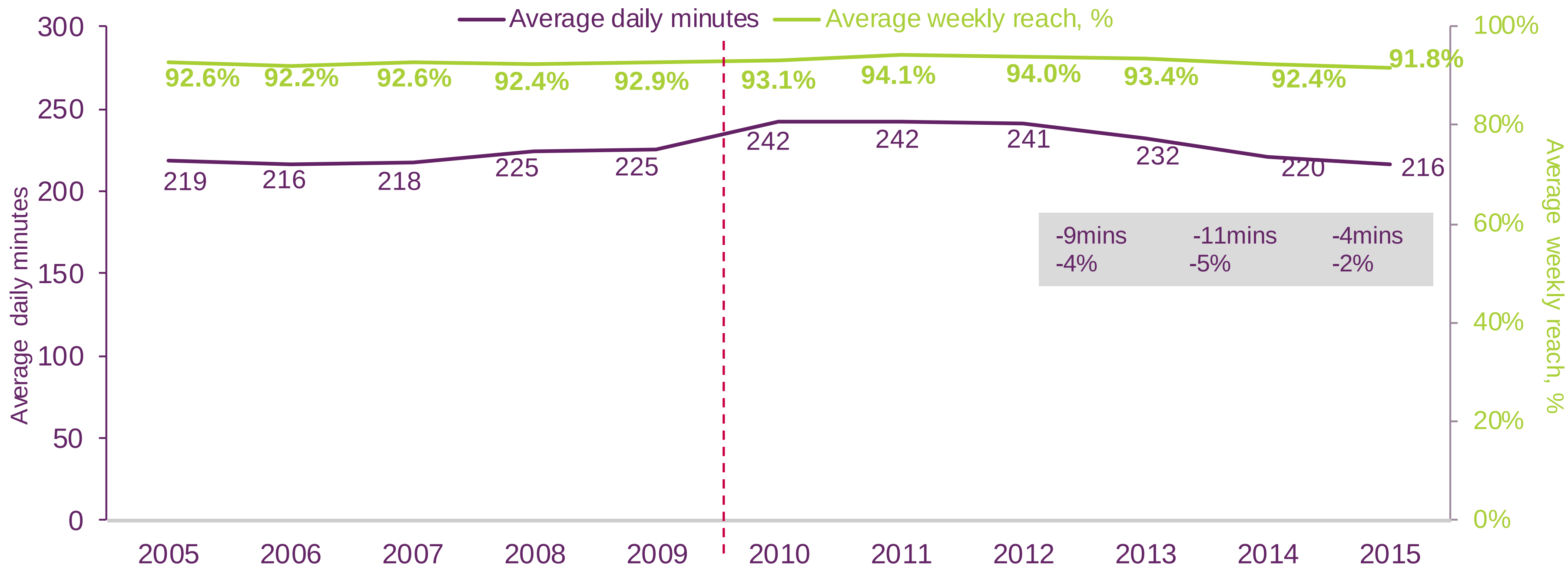


Source: Ofcom Media Tracker 2015.
Base: All respondents in 2015 (2,107); aged 16-34 (620), 35-54 (675), 55-64 (344), 65+ (468).
Q7/ Q9C/ Q10C/ Q11C/ Q13 - And which, if any of these devices have been connected to your home broadband service as well as a TV set in the home in the last 12 months to view something on the TV screen? Q14A-H/ Q15 – Which, if any, of these activities have you used your device for in the last 12 months when connected to a TV?

Figure 2.38

Average weekly reach and average daily minutes total broadcast TV: 2015-2015

Average daily minutes and average weekly reach%



Source: BARB, individuals 4+, network, total TV. Reach criterion= 15 consecutive minutes of viewing at least once in the average week. Full weeks used for the correct calculation of averages. Note: New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Figure 2.39

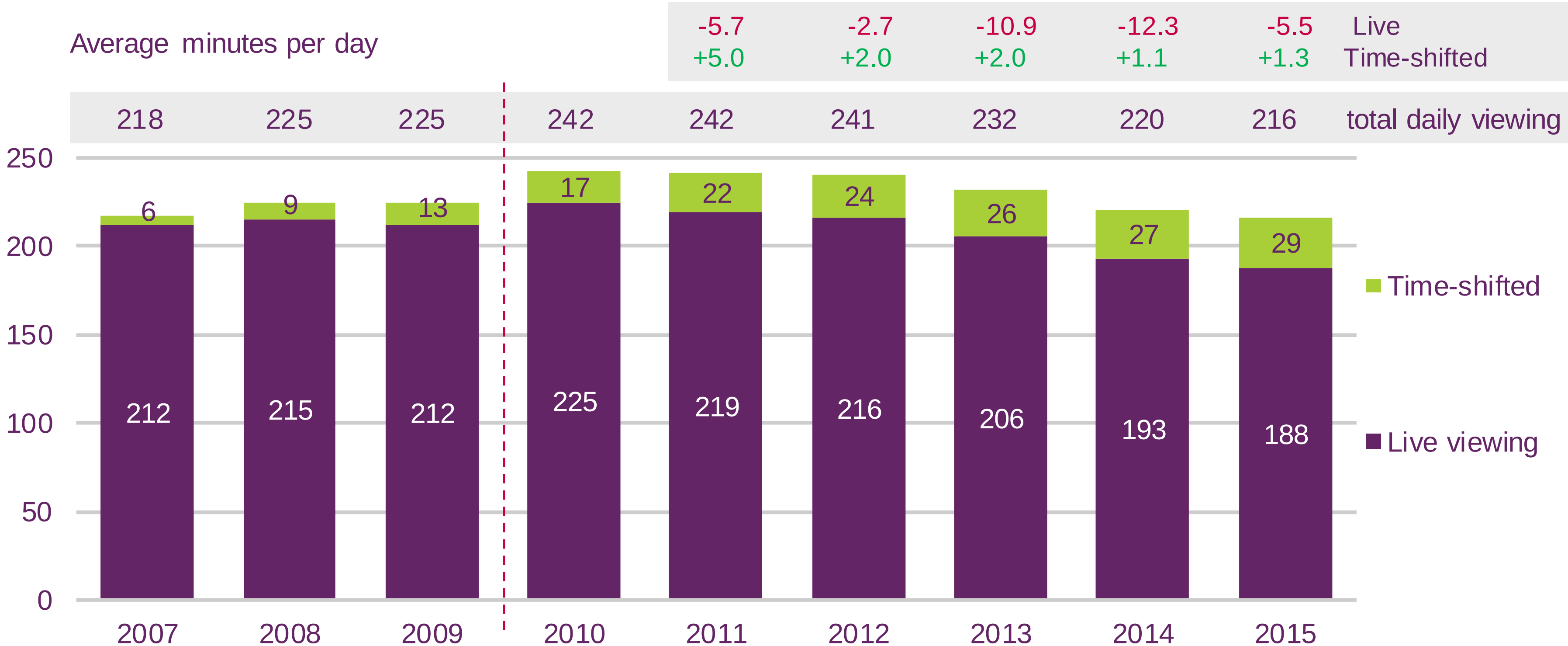
Change in average minutes per day of TV viewing, by age group: 2013-2015

Audience	Change 2013-2014	Change 2014-2015	% change 2013-2014	% change 2014-2015
Adults 65+	-1 minute	+2 minutes	-0.3%	+0.5%
Adults 55-64	-10 minutes	-2 minutes	-3.4%	-0.6%
Adults 45-54	-11 minutes	-5 minutes	-4.4%	-2.2%
Individuals 4+	**-11 minutes**	**-4 minutes**	**-4.9%**	**-1.9%**
Adults 35-44	-17 minutes	-5 minutes	-8.0%	-2.4%
Adults 25-34	-16 minutes	-7 minutes	-8.8%	-4.2%
Adults 16-24	-9 minutes	-15 minutes	-6.2%	-10.5%
Children 4-15	-17 minutes	-6 minutes	-12.4%	-5.4%

Source: BARB.

Figure 2.40

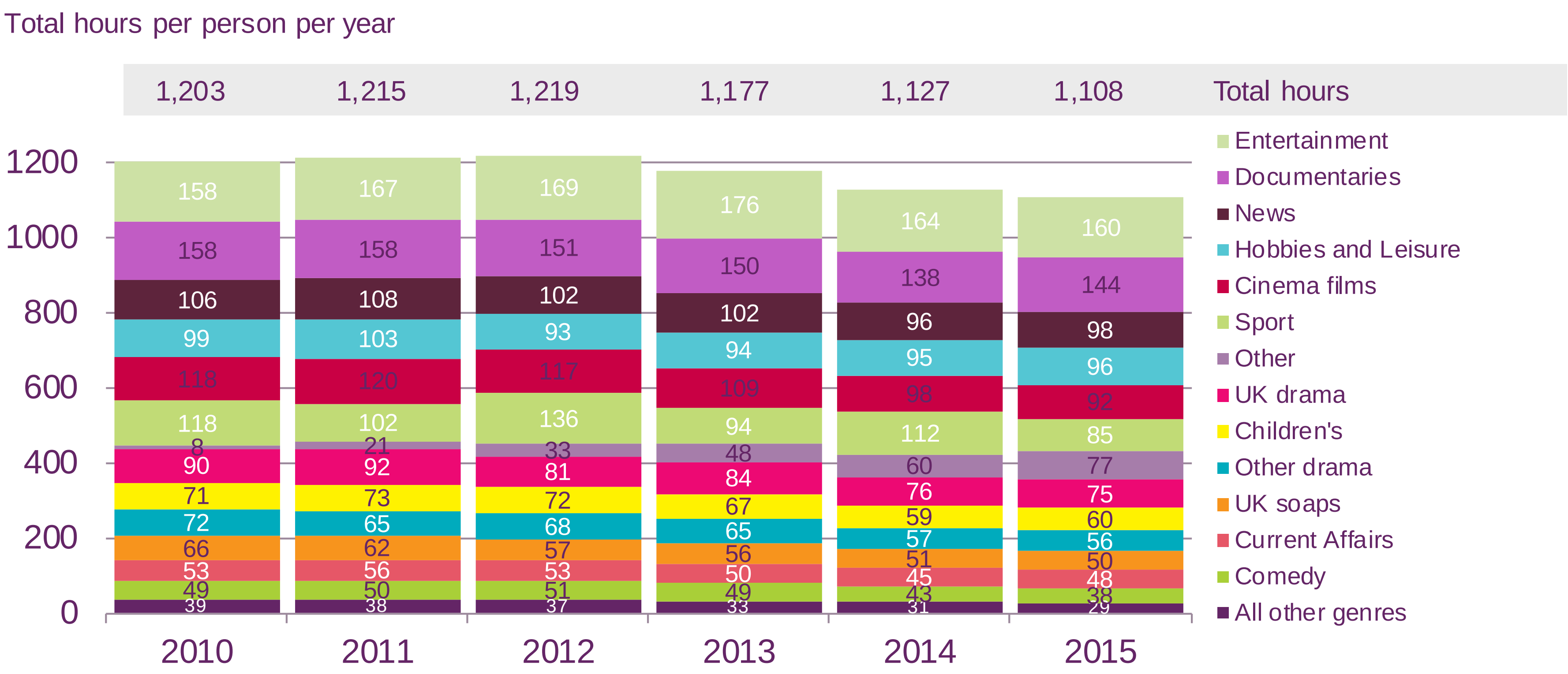
Average minutes of viewing per day, by activity: total TV



Source: BARB, individuals 4+, network, total TV. Average minutes of viewing per day. Chart figures may not add up due to rounding.
Note: New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).Chart figures may not add up due to rounding.

Figure 2.41

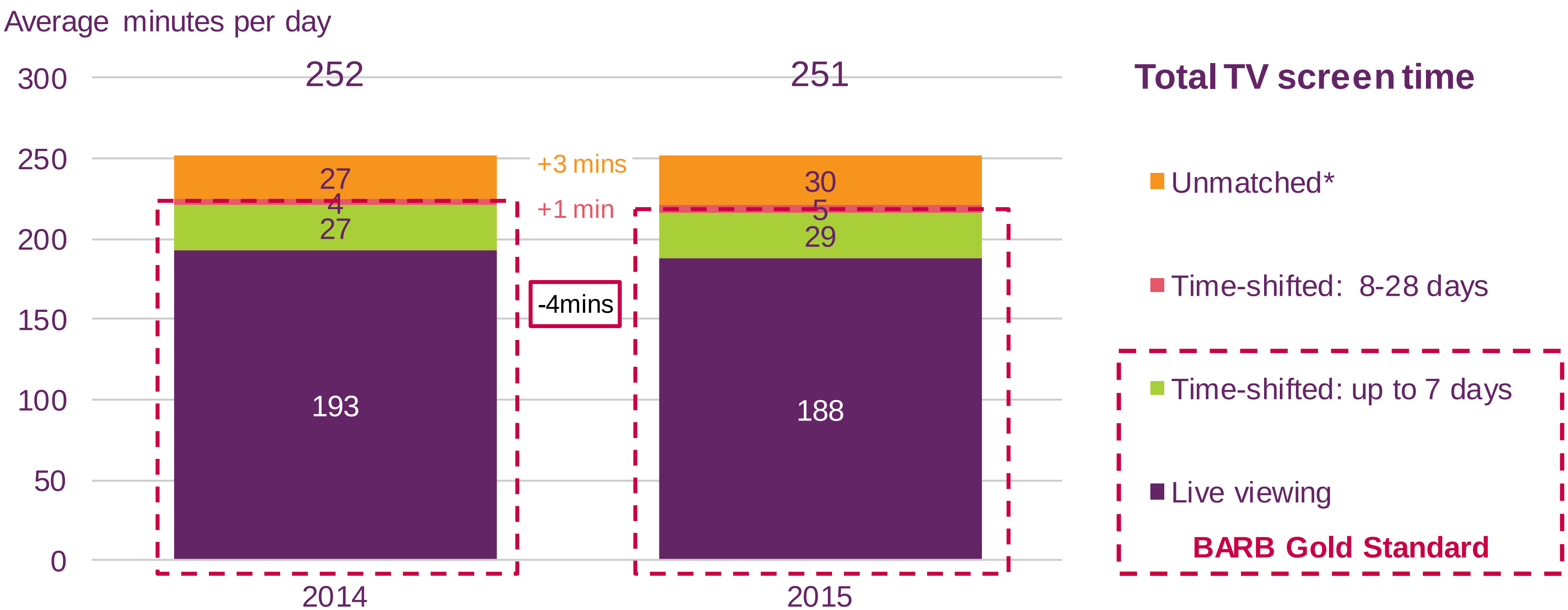
Viewing by genre across all channels: 2010-2015



Source: BARB, individuals 4+, network programming based on 4+ area filter, total TV. Total hours of viewing per year.
Note: There have been large increases in total viewing hours to the 'other: new programme' genre over the last few years. Programmes that fall into other genres may be coded as 'other: new programme'.

Figure 2.42

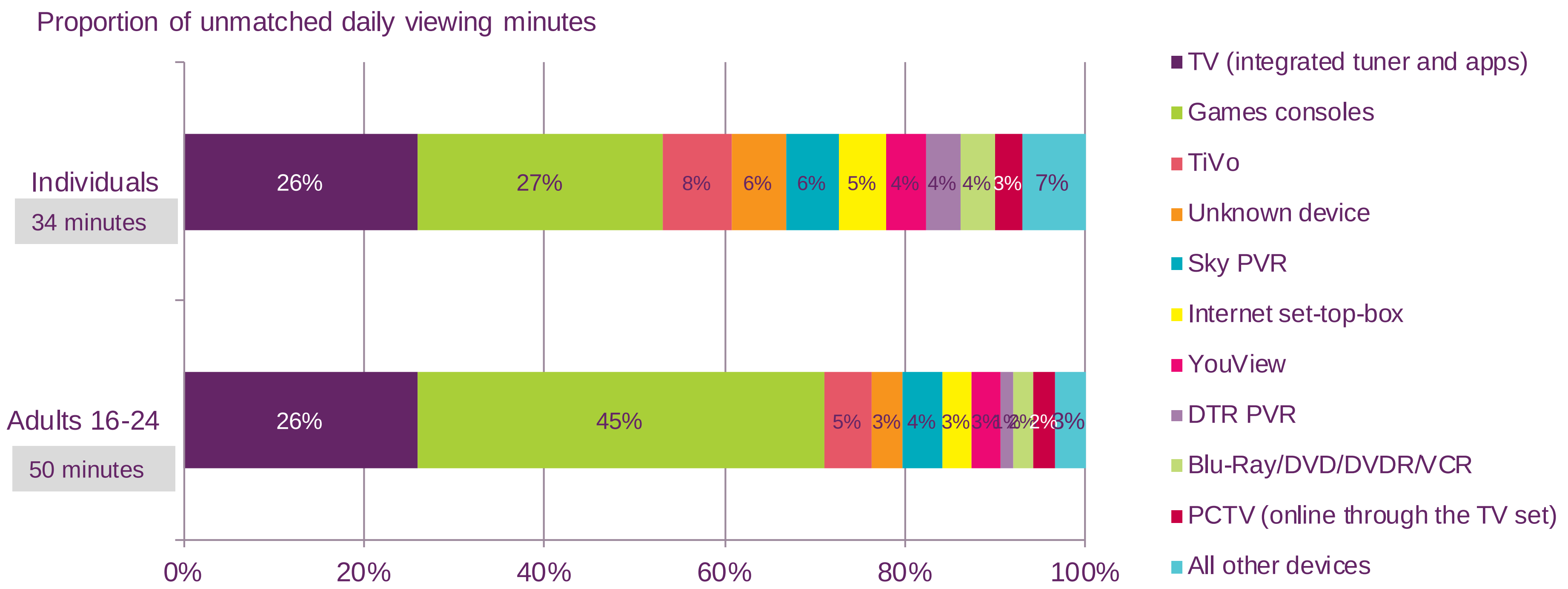
Average daily minutes of TV screen time, total TV: by activity type: 2014-2015



Source: BARB, individuals 4+. Average minutes of viewing/day.
*Note: Unmatched = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing to DVDs/box sets/archives, SVoD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content. Chart figures may not add up due to rounding. The majority of unreported viewing time came from the TV set or games consoles.

Figure 2.43

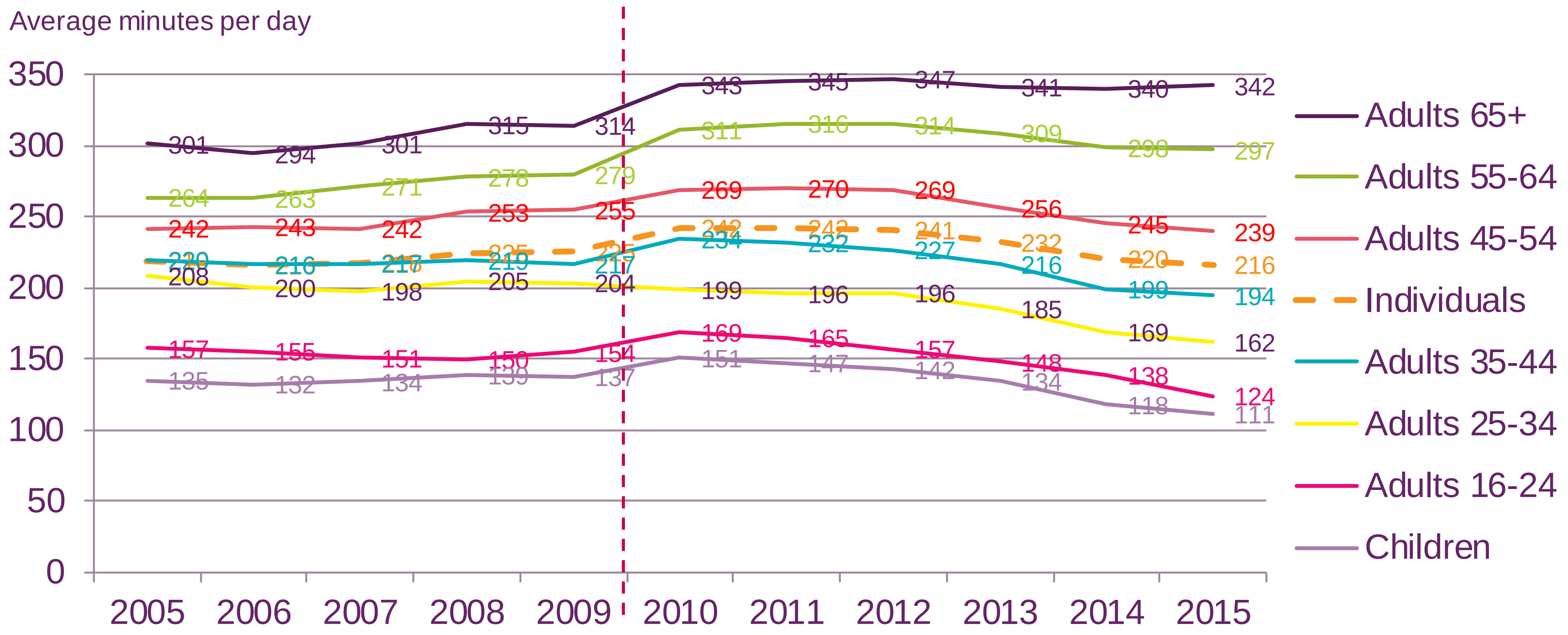
Unmatched viewing on the TV set, by device used: January-May 2016



Source: BARB. Unmatched viewing by device use, based on average daily minutes of viewing. 01/01/2016 to 31/05/2016 (34 mins for individuals and 50 mins for Adults 16-24).

Figure 2.44

Average daily minutes to total TV, by age group: 2005-2015



Source: BARB, Network, total TV. Average minutes of viewing per person per day. New BARB panel introduced 1 Jan 2010. As a result, pre- and post-panel change data must be compared with caution (see dotted line).

Figure 2.45

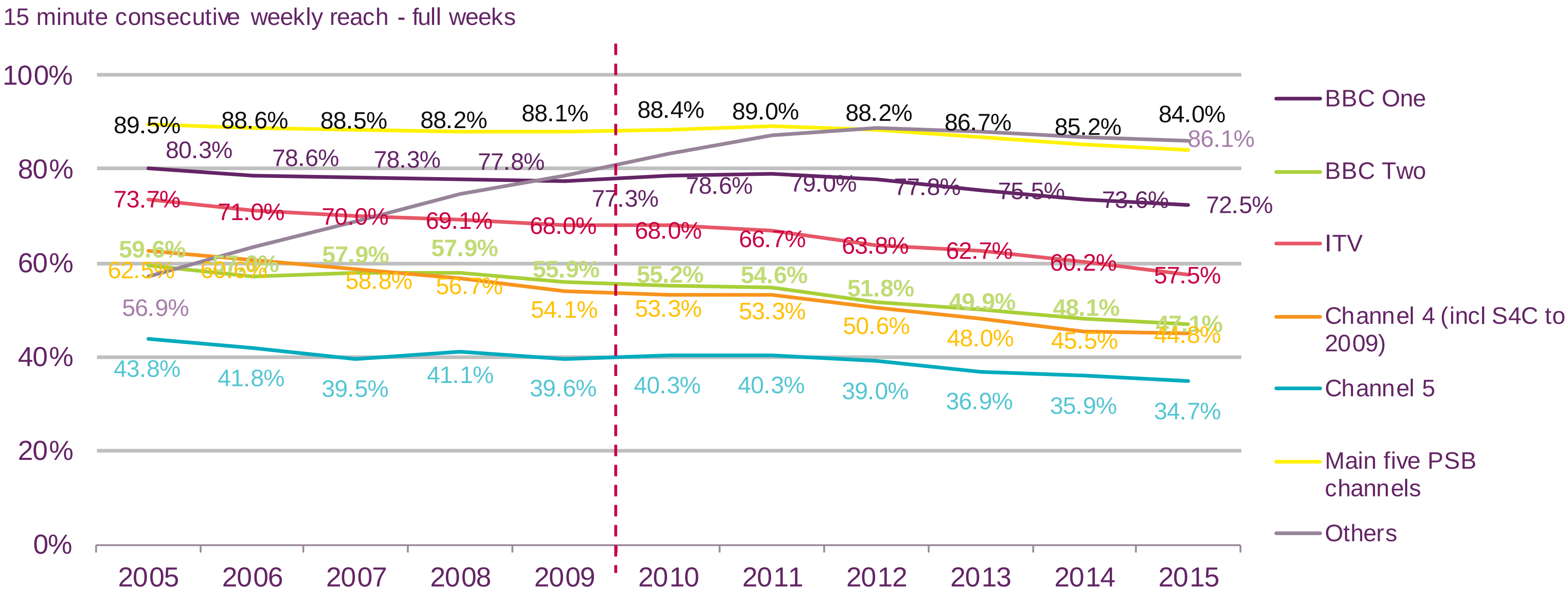
Average weekly reach of total broadcast TV, by age group, 2005-2015

	Individuals 4+	Children (4-15)	Adults 16-24	Adults 25-34	Adults 35-44	Adults 45-54	Adults 55-64	Adults 65+
2005	93%	90%	84%	92%	94%	95%	96%	96%
2006	92%	89%	83%	92%	94%	94%	95%	96%
2007	93%	91%	83%	92%	94%	95%	96%	96%
2008	92%	90%	82%	91%	94%	95%	96%	96%
2009	93%	91%	83%	92%	94%	96%	96%	96%
2010	93%	90%	85%	91%	95%	96%	96%	97%
2011	94%	92%	87%	93%	95%	96%	97%	97%
2012	94%	92%	86%	93%	95%	96%	97%	97%
2013	93%	91%	85%	92%	94%	96%	97%	97%
2014	92%	88%	83%	90%	94%	95%	96%	97%
2015	92%	87%	82%	89%	93%	95%	96%	97%

Source: BARB, total TV. Reach criteria: 15 consecutive minutes, full weeks used.

Figure 2.46

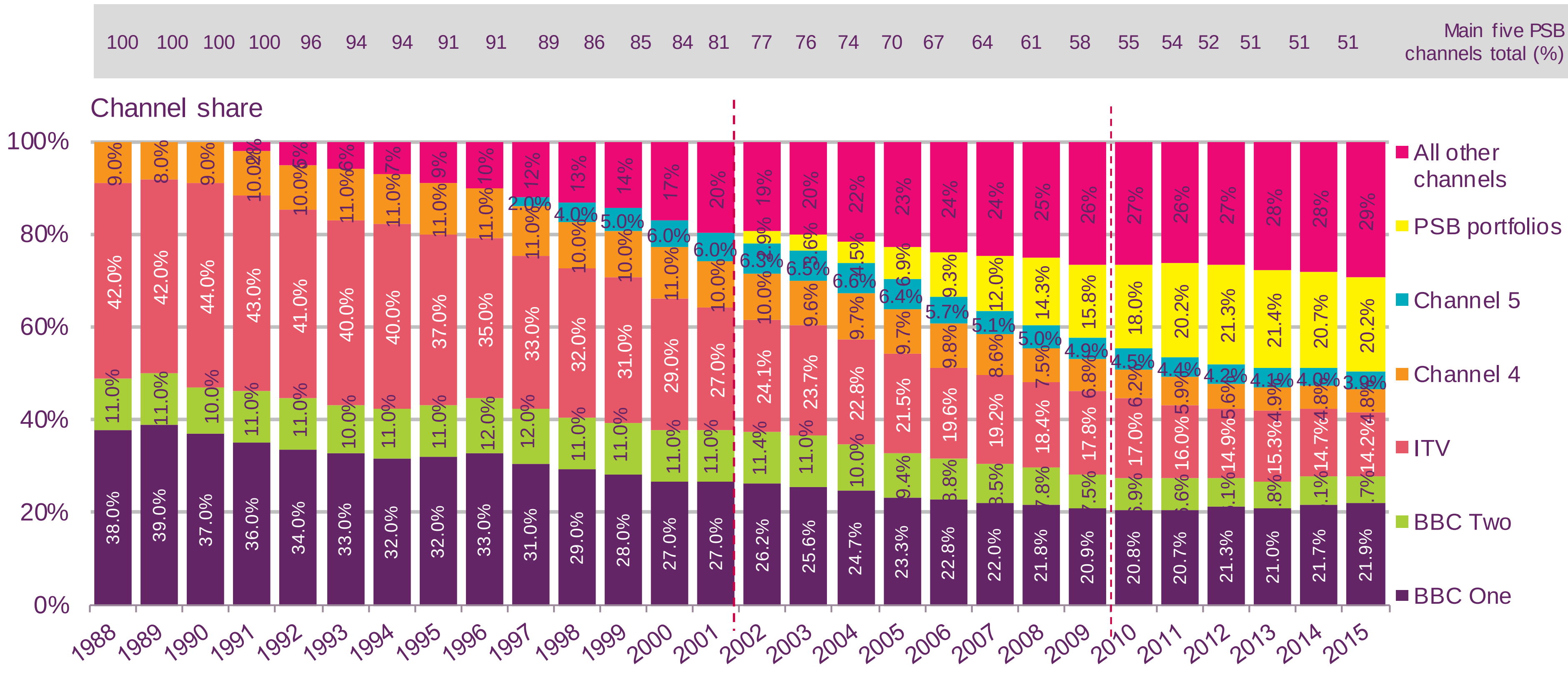
Average weekly TV reach in all homes, by channel: 2005-2015



Source: BARB, all individuals (4+), Network. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: Following digital switchover in Wales in 2010 S4C ceased to carry Channel 4 content. S4C is therefore included in the Channel 4 figure in and prior to 2009 but not from 2010 onwards. S4C weekly reach in 2015 was 0.5% (all homes). The main five PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Figure 2.47

Channel shares in all homes: 1988 to 2015

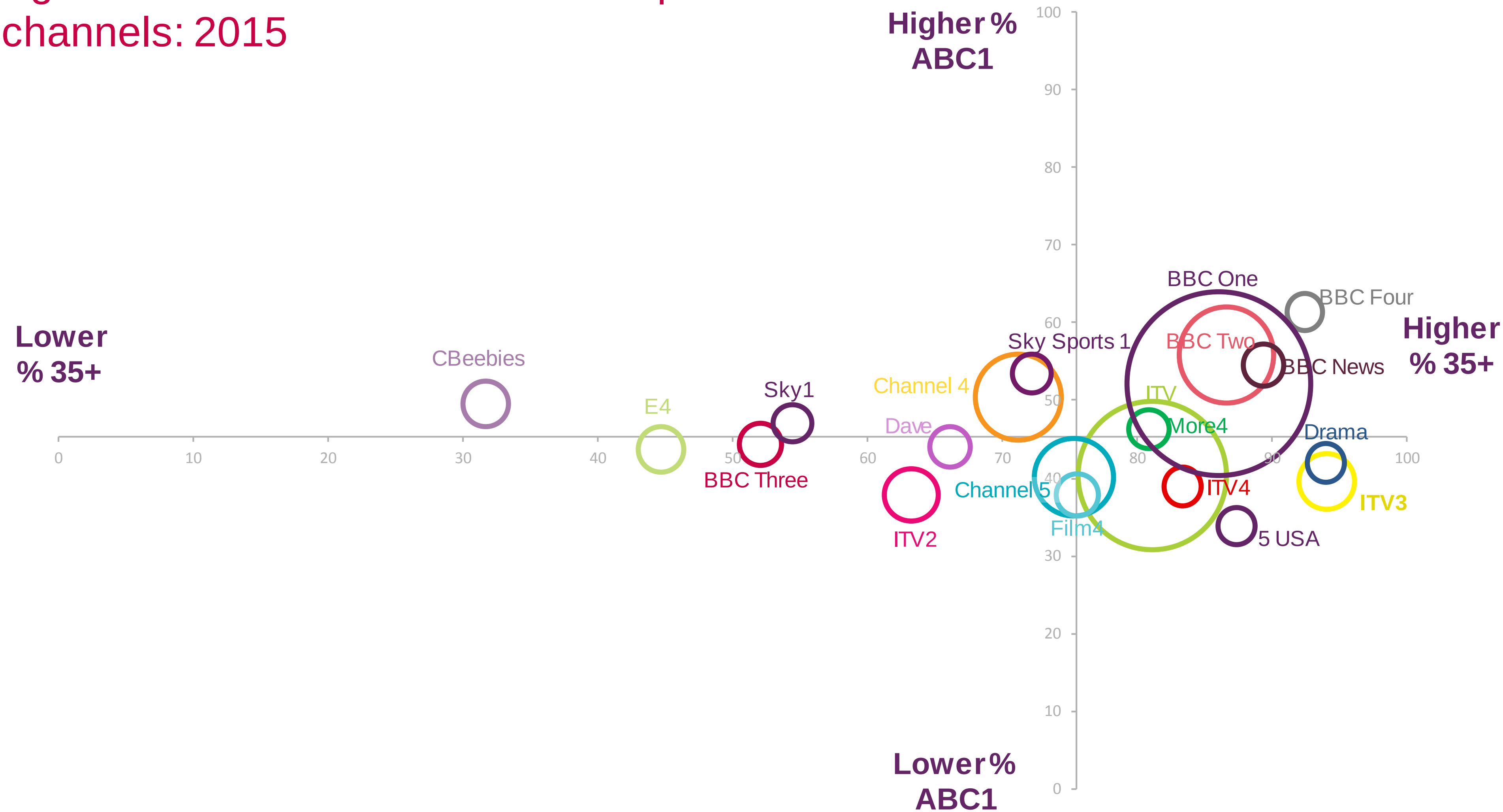


Source: BARB, TAM JICTAR and Ofcom estimates, individuals (4+)

Notes: a new BARB panel was introduced in 2002 and 2010, as a result, pre- and post-panel change data must be compared with caution (see dotted line) ; following digital switchover in Wales in 2010 S4C ceased to carry Channel 4 content, S4C is therefore included in the Channel 4 figure in and prior to 2009 but not from 2010 onwards; the main five PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Figure 2.48

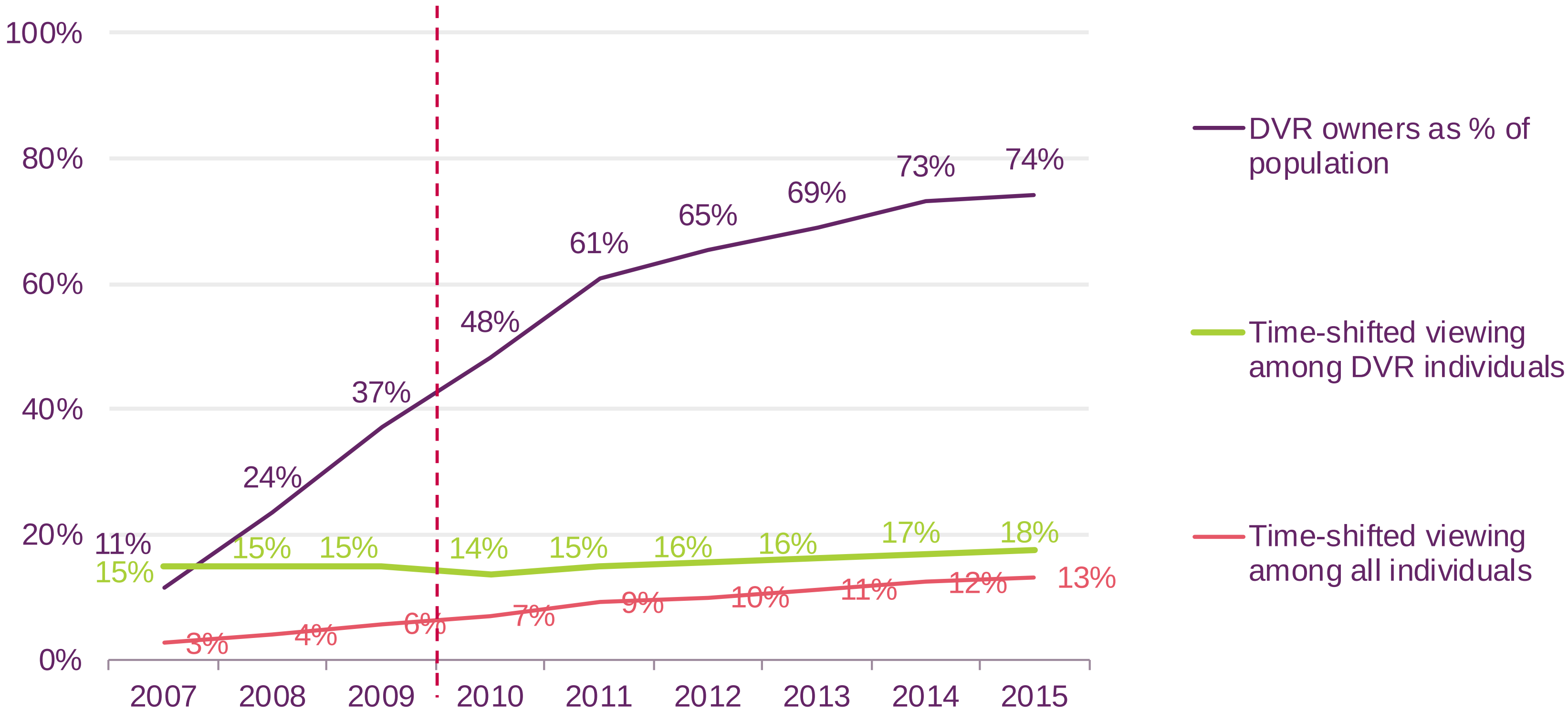
Age and socio-economic audience profile of the 20 most viewed channels: 2015



Source: BARB/InfoSys+/TRP Research. Individuals 4+. Based on the top 20 channels ranked by share, excluding individually reported +1 channels. Profile based on age: % 35+, SEG: % ABC1 individuals. Axes cross at the average age/SEG profile of Total TV. Includes HD variants, where applicable.

Figure 2.49

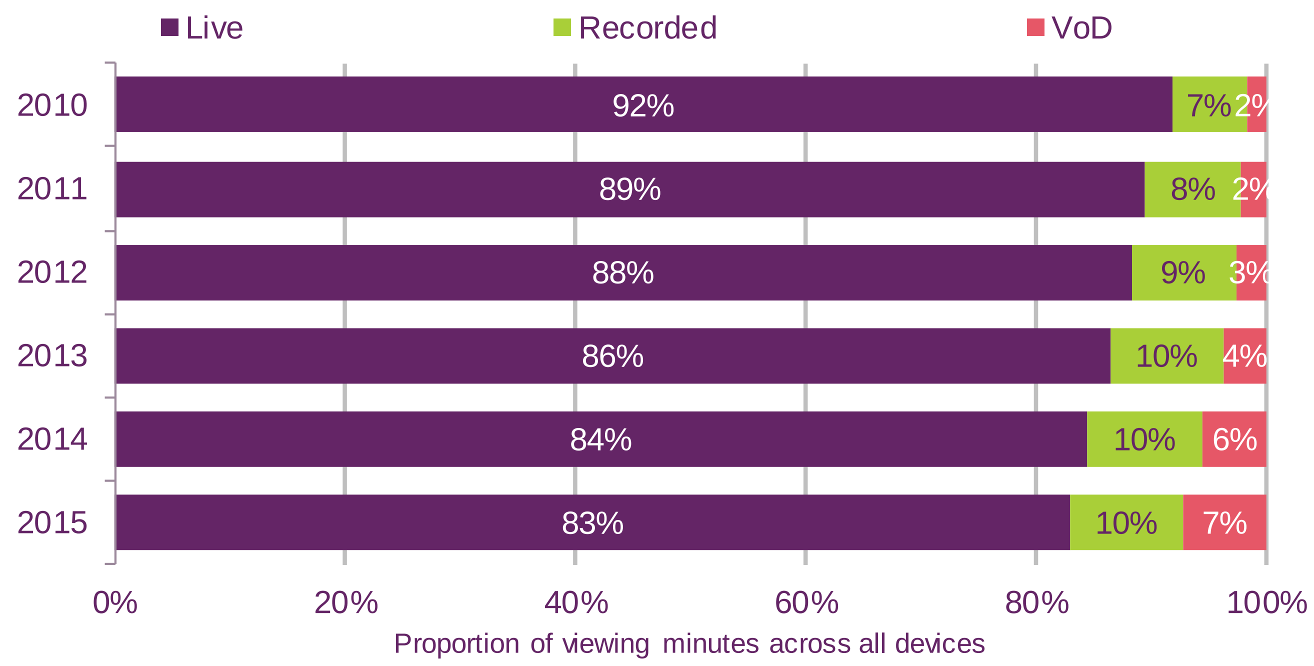
DVR take-up and time-shifted viewing: all individuals and individuals in DVR homes: 2007-2015



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

Figure 2.50

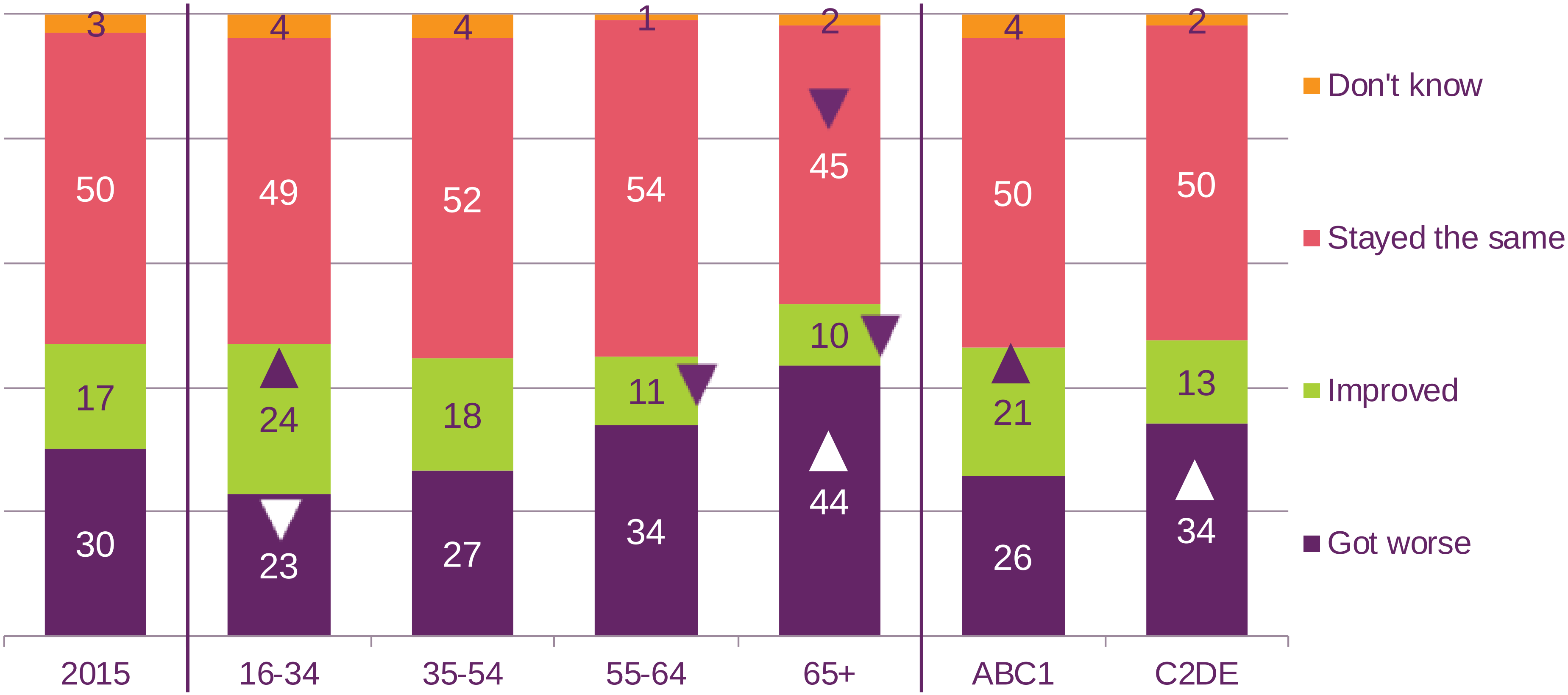
Proportion of all AV viewing: live TV, DVR and VoD: 2010-2015



Source: 3 Reasons estimates (including BARB data).
Base: All devices, long-form professional audio-visual content, Live includes simulcast. Excludes physical consumption (e.g. DVDs), and short-form

Figure 2.51

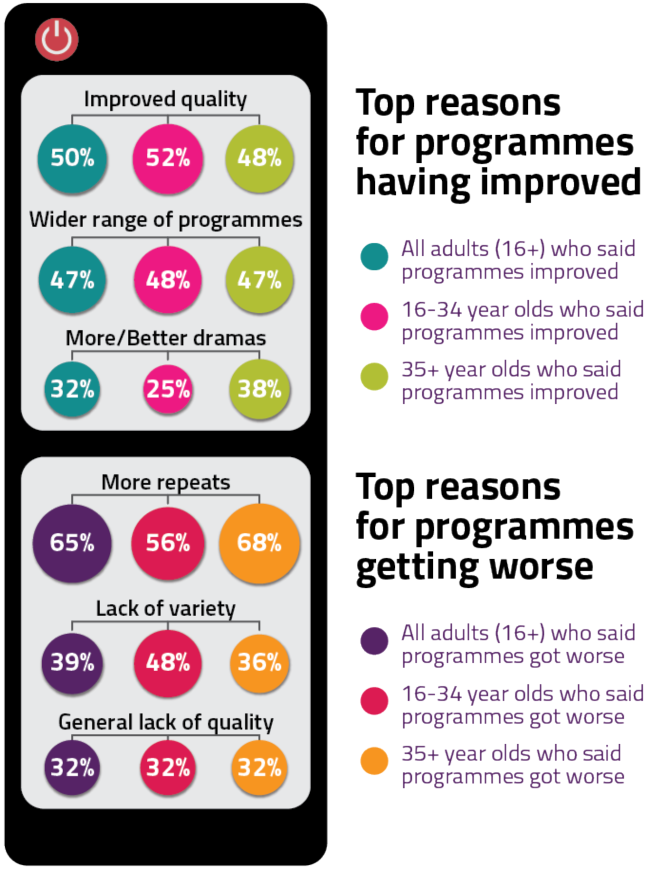
Opinion on the quality of programmes over the past 12 months (% of adults with a TV)



Source: Ofcom Media Tracker, 2015.
Q20 - Do you feel that over the past year television programmes have improved, got worse or stayed about the same?
Base: All with any TV sets in 2015 (2,052); aged 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); ABC1 (1,055); C2DE (993).
Significance testing shows any difference between any age group and all adults and any difference between socio-economic groups.

Figure 2.52

Top reasons given for programmes having improved or got worse



Source: Ofcom Media Tracker, 2015.
Q21 - In what ways do you think that the television programmes have improved over the past year?
Q22 - In what ways do you think that the television programmes have got worse over the past year?
Base: All saying programmes 'improved' over past year (320); 16-34 (130); 35+ (190); All saying programmes 'got worse' over past year (646); 16-34 (139); 35+ (507) Unprompted, multicode.

Figure 2.53

Opinion on the amount of sex, violence and swearing on TV among viewers

Source: Ofcom Media Tracker, 2015. Q46 - Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television: a) sex? b) violence? c) swearing?
Base: All with any TV sets (2,052). Prompted, single code.

Figure 2.2

Industry metrics

UK television industry	2010	2011	2012	2013	2014	2015
Total broadcast TV industry revenue	£11.8bn	£12.4bn	£12.5bn	£12.8bn	£13.2bn	£13.6bn
Proportion of revenue which is BBC income allocated to TV	22%	21%	21%	20%	21%	19%
Proportion of revenue generated by advertising	30%	29%	28%	29%	29%	30%
Proportion of revenue generated by subscriptions	43%	44%	44%	46%	45%	45%
Total online TV industry revenue	£180m	£238m	£379m	£574m	£795m	£976m
Broadcaster share of total display advertising spend	43%	43%	43%	43%	43%	43%
Spend on originated output by main five PSB channels	£2.5bn	£2.5bn	£2.6bn	£2.5bn	£2.6bn	£2.6bn
Spend on network content by UK broadcasters	£5.4bn	£5.5bn	£5.6bn	£5.8bn	£6.4bn	£6.5bn
Digital TV homes (proportion of all households)	92%	94%	96%	95%	93%	95%
Traditional pay-TV subscriptions	14.4m	14.7m	15.0m	16.0m	17.1m	17.9m
Weekly reach of broadcast TV (proportion of people 4+)	93%	94%	94%	93%	92%	92%
Minutes spent watching TV per day (per person aged 4+)	242	242	241	232	220	216
Share of the main five PSB channels in all homes	55%	54%	52%	51%	51%	51%
VoD usage (proportion of adults 15+)	27%	43%	38%	51%	57%	59%

Sou ... ce
fee ... c
Exp ... and
regions programming (not Welsh or Gaelic language programmes but some Irish language). Traditional pay-TV subscriptions are from Sky, Virgin TalkTalk and BT and are provided by Enders Analysis. Sky figures include Now TV, ROI and overseas business subscriptions. TV viewing based on BARB analysis of viewing to scheduled TV programmes on TV sets up to seven days after first broadcast. After DSO in October 2012, all homes were required to have digital TV. From 2013, data refers to the proportion of UK homes that had a working TV set as defined in BARB's Establishment Survey. Data refers to Q4 of each year. BARB changed the methodology for defining a TV set home from Q4 2015 and data comparisons to previous years should be treated with caution. VoD usage figures provided by Kantar Media – TGI.