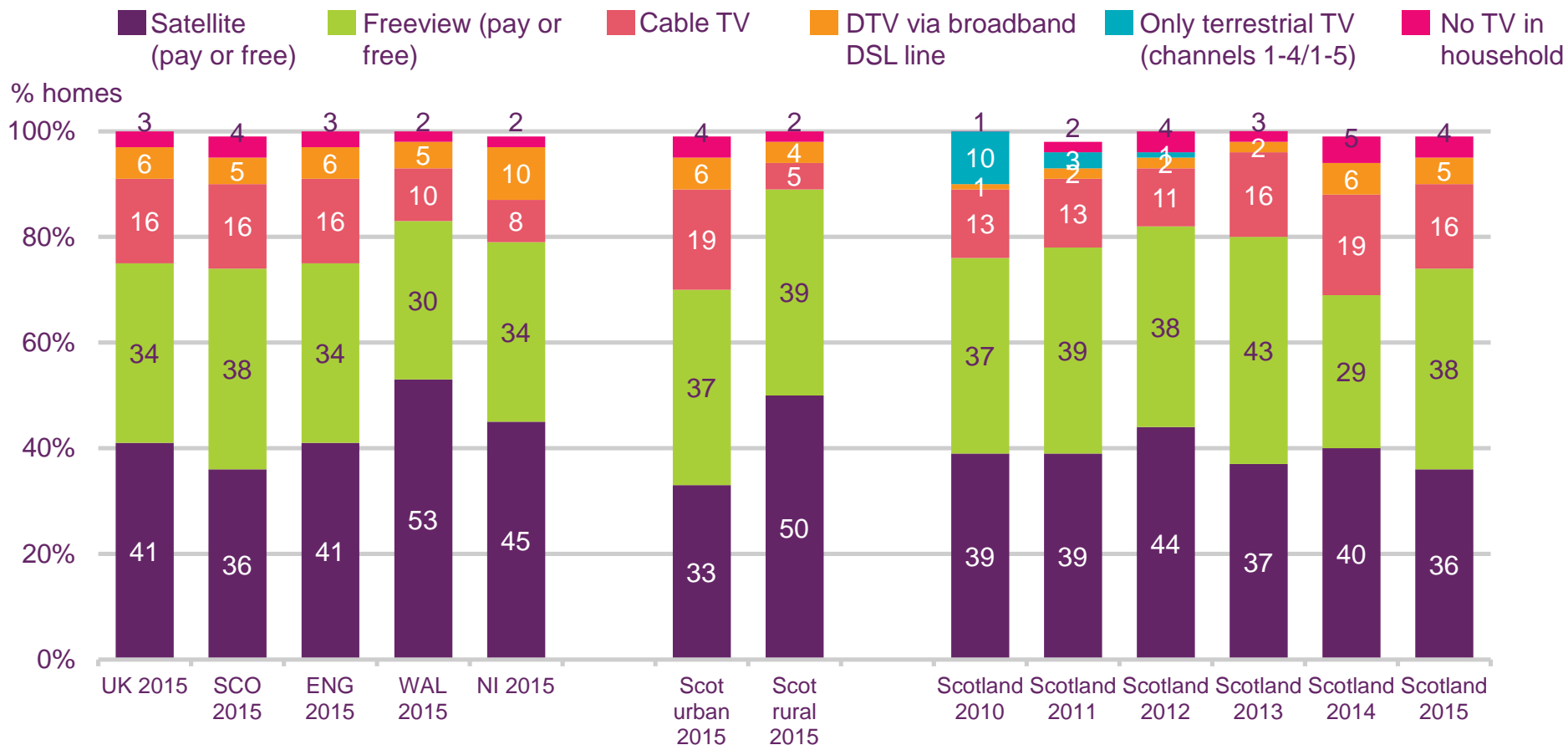


# Television and audio-visual

# Figure 2.1

## Main television set share, by platform



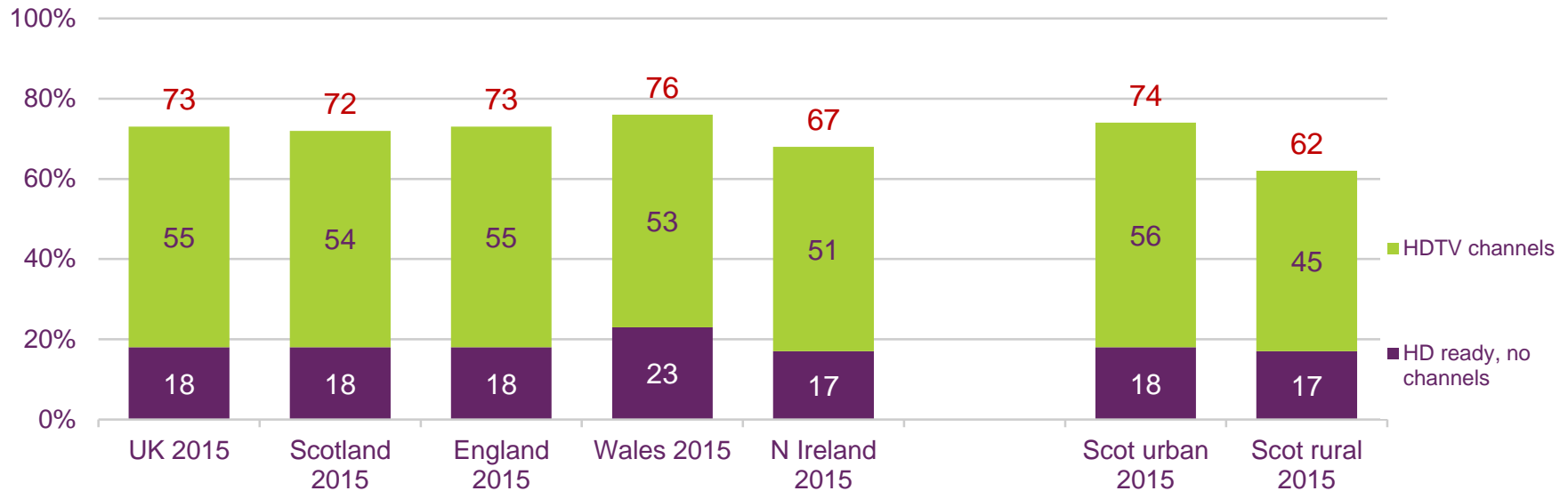
Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 492 Scotland, 2264 England, 496 Wales, 504 Northern Ireland, 246 Scotland urban, 246 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015)

QH1a. Which, if any, of these types of television does your household use at the moment?/ QH1b And which of these do you consider is your main type of television?

# Figure 2.2

## Proportion of homes with HD television



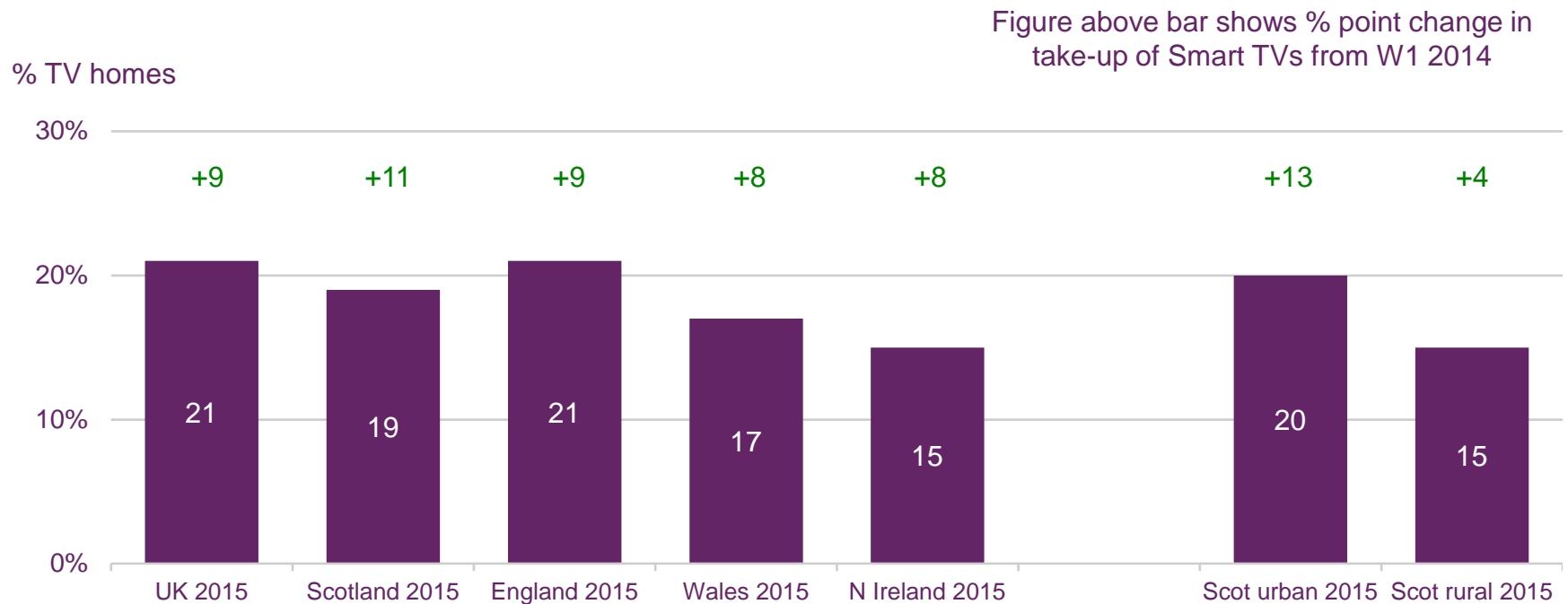
Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 492 Scotland, 2264 England, 496 Wales, 504 Northern Ireland, 246 Scotland urban, 246 Scotland rural)

QH53. Is the main TV in your household an HDTV set or HD ready?/ QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

# Figure 2.3

## Smart TV take-up



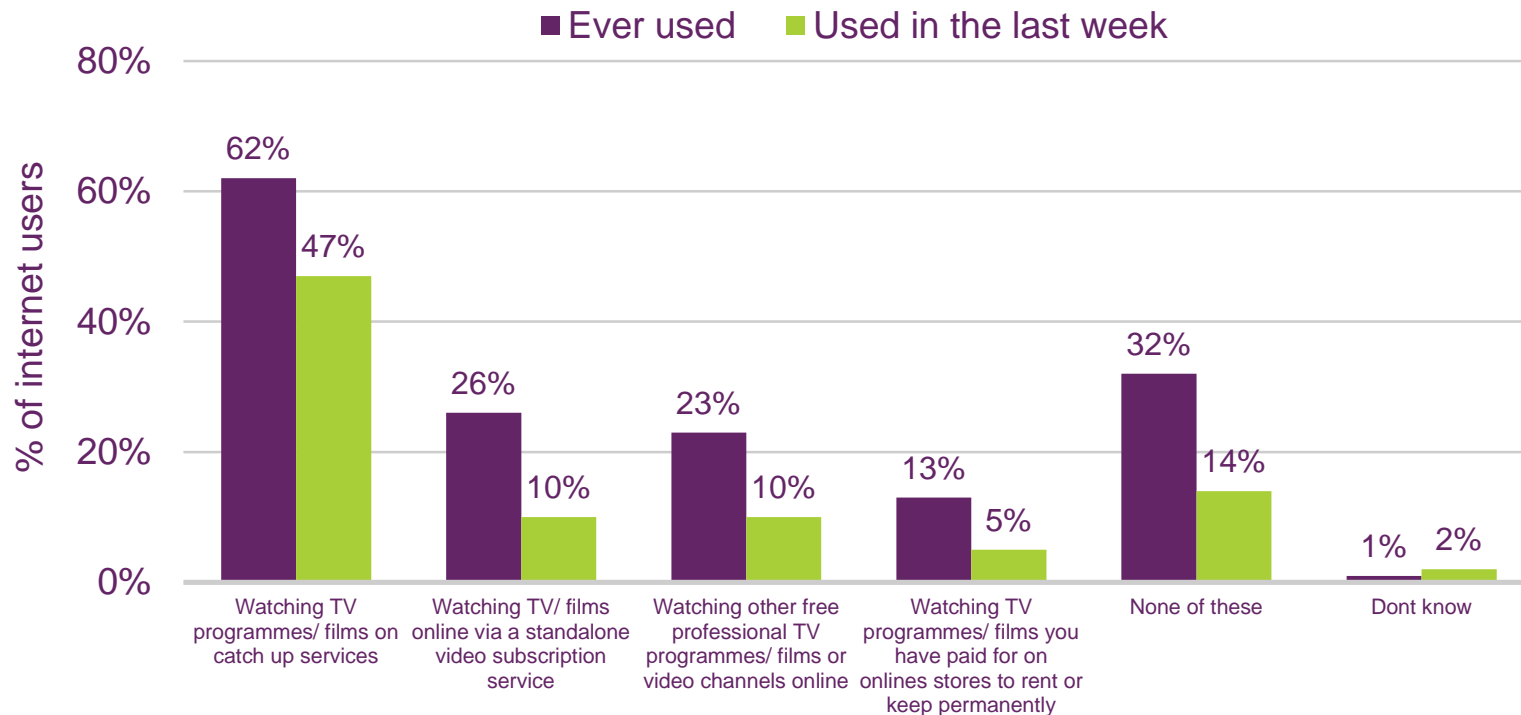
Source: Ofcom Technology Tracker, wave 1 2015

Base: All adults aged 16+ with a TV in household (n = 3616 UK, 472 Scotland, 2197 England, 485 Wales, 462 Northern Ireland, 231 Scotland urban, 241 Scotland rural)

QH18. Are any of your TV sets "smart TVs"? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

## Figure 2.4

### TV programmes and films: demand on any service



Source: Ofcom Technology Tracker, wave 1 2015

Base: All Scotland adults aged 16+ who use the internet at home or elsewhere (n = 388)

QH17 (QH46)/QH18 (QH47): Thinking about your personal use of TV programmes and films online and on demand services that you may use on any device (e.g. smartphone, TV set, tablet or laptop) anywhere, which of the following, if any, have you personally ever used? And which, if any, of these have you used in the last week?

# Figure 2.5

## Average minutes of television viewing per day, by nation: 2014

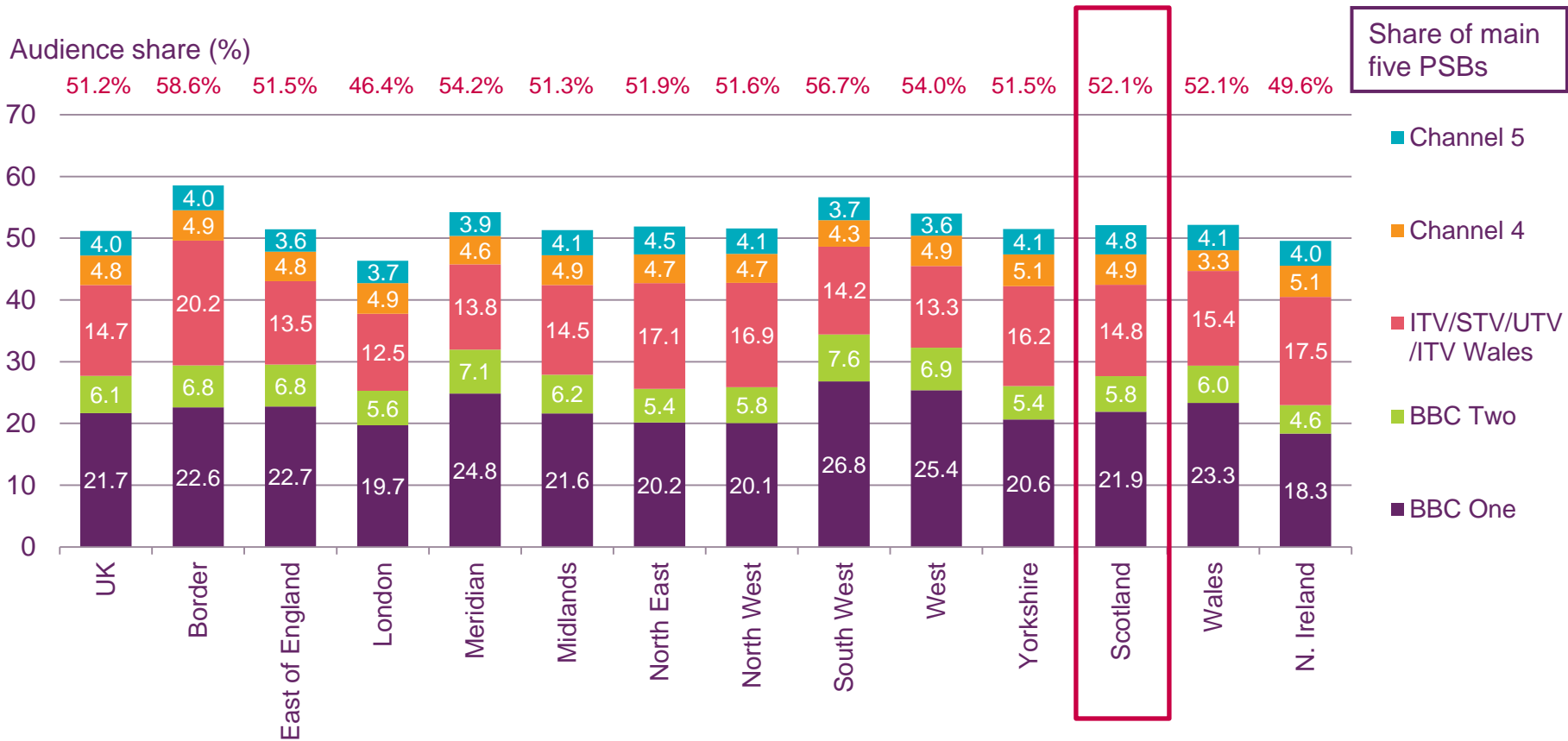


Source: BARB, Individuals (4+). Main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5, including HD variants but excluding +1s. PSB portfolio channels = BBC Three, BBC Four, BBC News, BBC Parliament, CBBC, CBeebies, BBC streaming channels, ITV+1 Network (inclITV Breakfast) ,ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV, Channel 4+1, E4, E4 +1, More4, More4 +1, Film4, Film4+1, 4Music, 4seven, Channel 5+1, 5\*, 5\*+1, 5USA, 5USA+1. HD variants are included where applicable.

\*Note: This figure reflects the average across the English regions with the highest in Border at 250 minutes (4 hours 10 minutes) and lowest in West at 197 minutes (3 hours 17 minutes) respectively.

# Figure 2.6

## Share of the main five PSB channels in all homes, by UK nations and regions: 2014



Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

Note: Chart shows figures rounded to one decimal place. Numbers may not appear to sum up to total share of main five PSBs due to rounding.

## Figure 2.7

### Reduction in combined share of the main five PSB channels, all homes: 2009 and 2014

Audience share (%)



Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

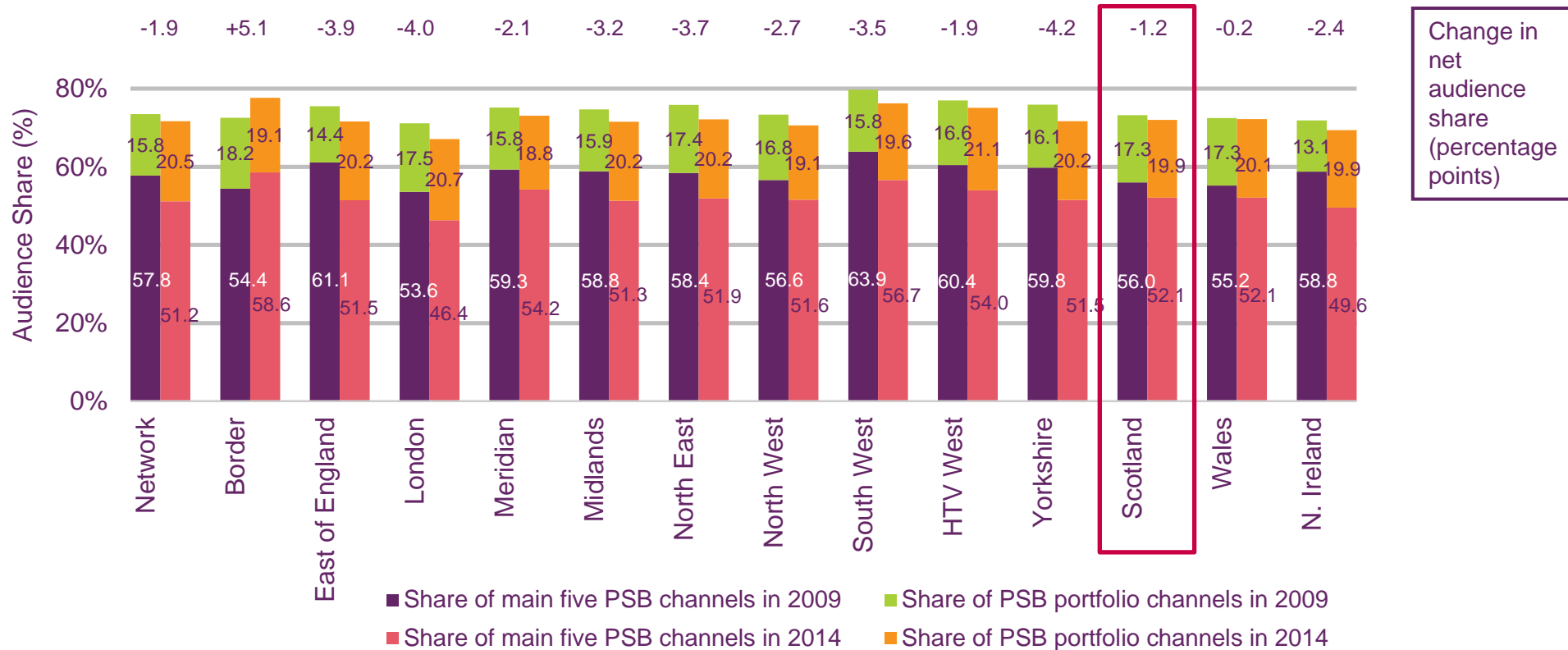
Notes: i) Following digital switchover in Wales in 2010, S4C ceased to carry Channel 4 content. S4C is therefore included in the main five PSB channels in 2009 but not in 2014. S4C's average share in Wales in 2014 is 1.8%. ii) In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre- and post-panel change data should be compared with some caution.



# Figure 2.8



## Net change in the audience share of the main five PSB channels and their portfolio channels, all homes: 2009 and 2014



Source: BARB, Individuals 4+. Main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5, including HD variants but excluding +1s. PSB portfolio channels = BBC Three, BBC Four, BBC News, BBC Parliament, CBBC, CBeebies, BBC streaming channels, ITV+1 Network (inc. ITV Breakfast), ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV, Channel 4+1, E4, E4 +1, More4, More4 +1, Film4, Film4+1, 4Music, 4seven, Channel 5+1, 5\*, 5\*+1, 5USA, 5USA+1. HD variants are included where applicable.

Notes: i) Following digital switchover in Wales in 2010 S4C ceased to carry Channel 4 content. S4C is therefore included in the main five PSB channels in 2008 but not in 2014. S4C's average share in Wales in 2014 is 0.9%. ii) In 2010 a new BARB panel was introduced, including the redefining of boundaries. Therefore, pre- and post-panel change data should be compared with caution. v) Numbers may not add to 100% due to rounding.

## Figure 2.9

### BBC One and ITV/ STV/ UTV/ ITV Wales early evening news bulletin shares, all homes: 2014

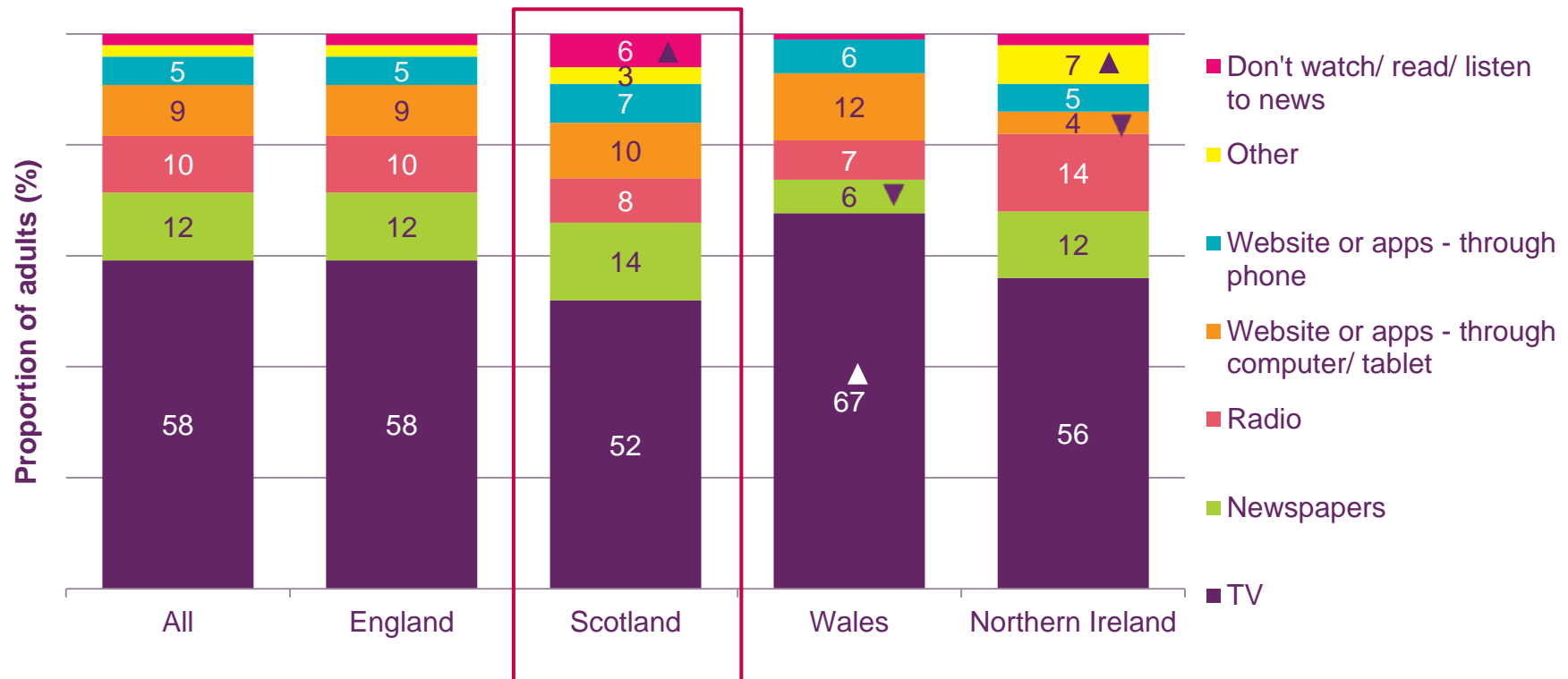


Source: BARB, Individuals (4+). BBC One includes HD variant. ITV excludes HD variants and +1.

Note: Early evening ('local') news bulletin figures based on 'regional news' genre programmes, start time 17:55-18:35, 10mins+ duration, BBC One & ITV (exc HD), weekdays. UK figures based on share to respective early evening news bulletin day parts. BBC One's early evening news bulletin is transmitted between 18:30 – 19:00 and ITV/STV/UTV/ITV Wales' is transmitted between 18:00 – 18:30.

# Figure 2.10

Respondents' main media source for UK and world news, by nation: 2014



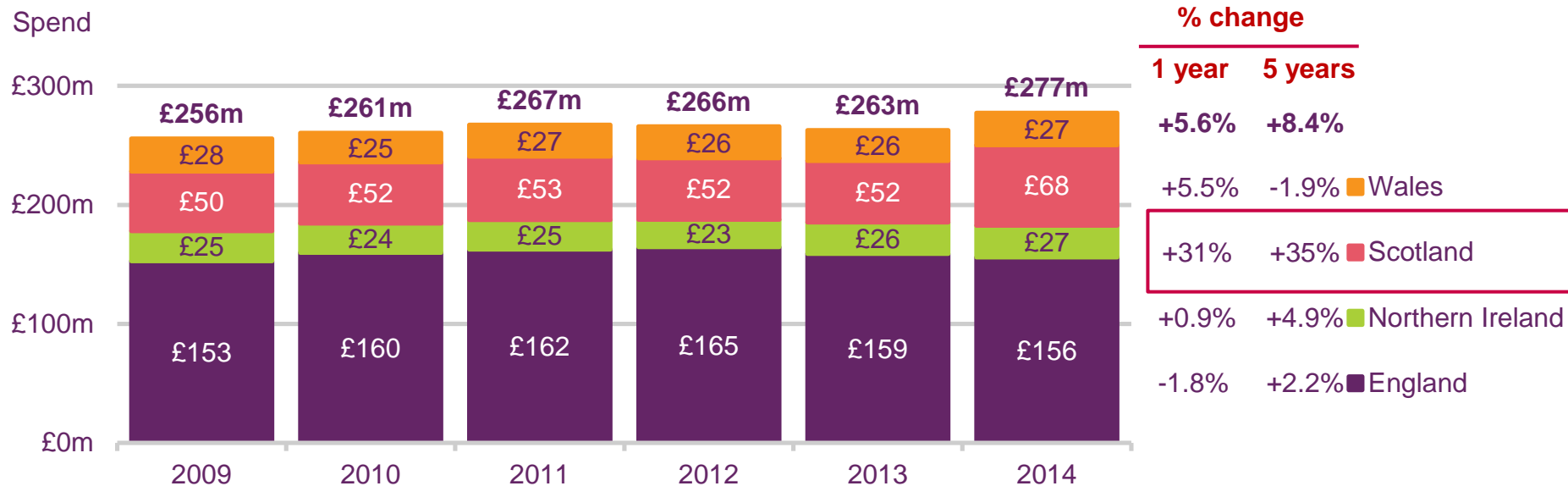
Source: Ofcom Media Tracker 2014.

Base: All (2,074); England (1,577); Scotland (183); Wales (154); Northern Ireland (160).

Significance testing (indicated by a triangle) shows any difference in the main source of news between any nation and all adults.

# Figure 2.11

## Spend on first-run originated nations' and regions' output by the BBC/ ITV1/ STV/ UTV



Source: Broadcasters. All figures are nominal.

Note: Spend data for first-run originations only. Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England.

## Figure 2.12

Change in total spend on nations' and regions' output, by genre and nation: 2009-2014

|                                     | UK      |         | England |         | N. Ireland |         | Scotland |         | Wales   |         |
|-------------------------------------|---------|---------|---------|---------|------------|---------|----------|---------|---------|---------|
|                                     | 1yr (%) | 5yr (%) | 1yr (%) | 5yr (%) | 1yr (%)    | 5yr (%) | 1yr (%)  | 5yr (%) | 1yr (%) | 5yr (%) |
| <b>Current Affairs</b>              | 22%     | 21%     | 10%     | -1%     | 28%        | 43%     | 49%      | 61%     | 16%     | 29%     |
| <b>News</b>                         | 5%      | 6%      | 2%      | 4%      | 9%         | 8%      | 24%      | 17%     | 15%     | 30%     |
| <b>Non-news/non-current affairs</b> | 11%     | 11%     | -2%     | 119%    | -13%       | -7%     | 27%      | 33%     | -2%     | -23%    |
| <b>Total Spend in 2014</b>          | £285m   |         | £163m   |         | £27m       |         | £69m     |         | £27m    |         |

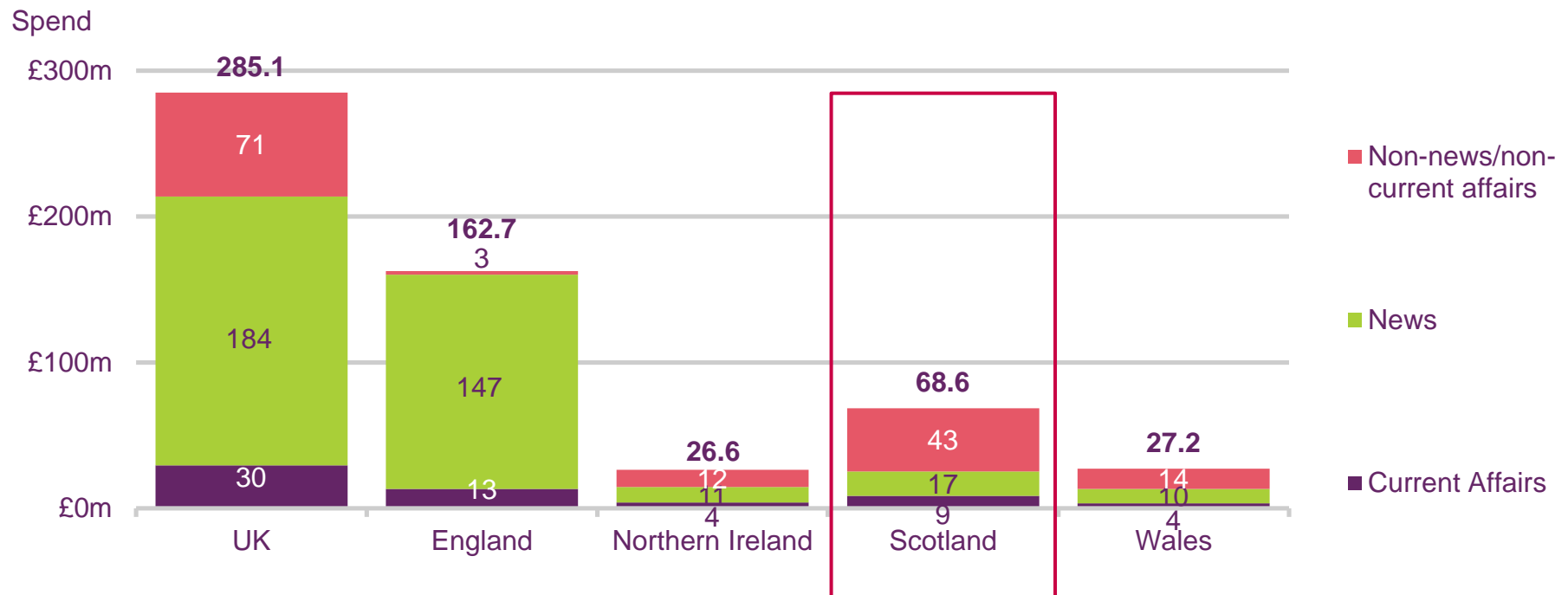
|                        | UK  |     | England |     | N. Ireland |     | Scotland |     | Wales |     |
|------------------------|-----|-----|---------|-----|------------|-----|----------|-----|-------|-----|
|                        | 1yr | 5yr | 1yr     | 5yr | 1yr        | 5yr | 1yr      | 5yr | 1yr   | 5yr |
| <b>Change in Spend</b> | 8%  | 9%  | 2%      | 4%  | 0%         | 5%  | 29%      | 32% | 6%    | -3% |

Source: Broadcasters. All figures are nominal.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England.

## Figure 2.13

Total spend by the BBC/ ITV1/ STV/ UTV on non-network nations'/ regions' output for the main PSB channels (BBC One and Channel 3): 2014

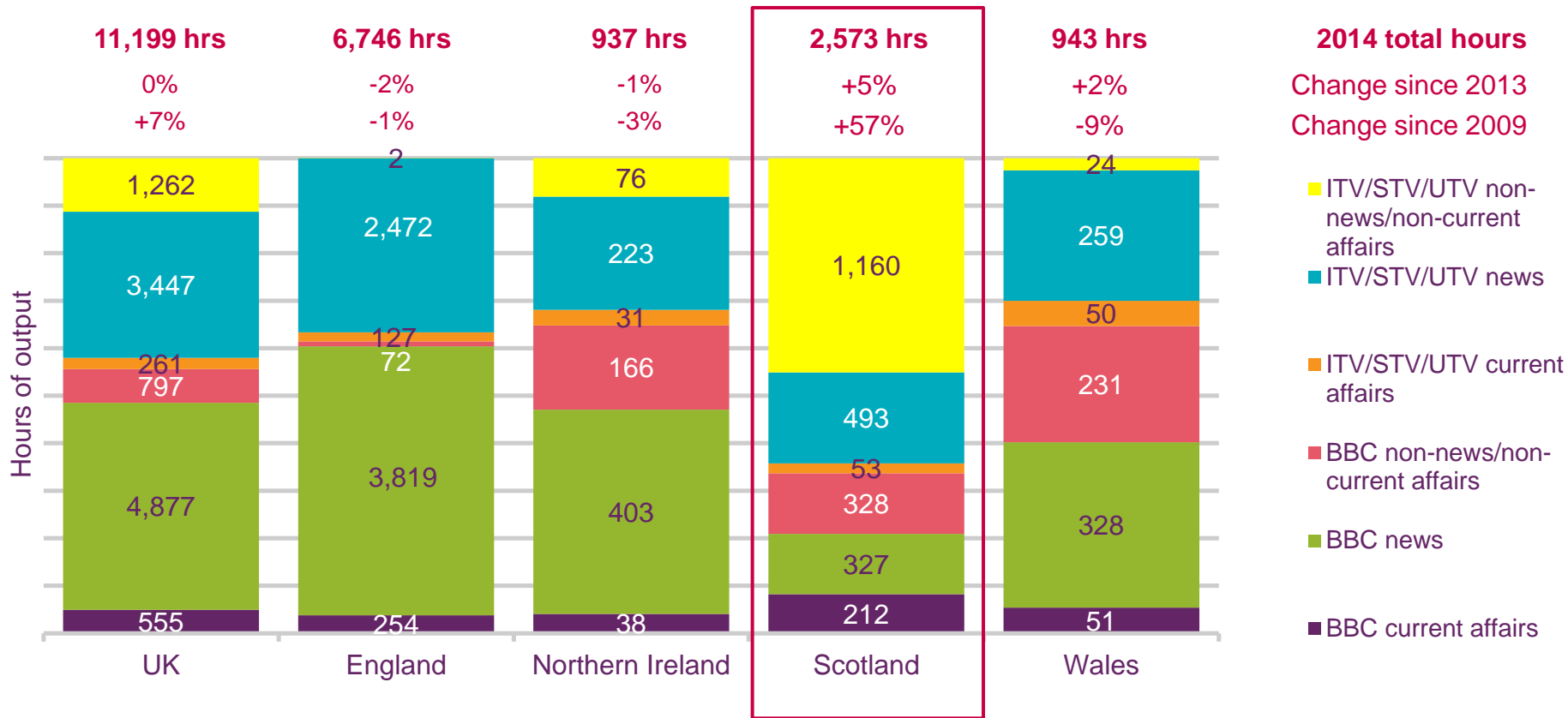


Source: Broadcasters.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England.

# Figure 2.14

## Hours of first-run originated nations'/regions' output, by genre and broadcaster: 2014



Source: Broadcasters.

Note: Hours data for first-run originations only. Excludes hours for BBC Alba and S4C output but includes some hours of Irish language programming by the BBC. These figures do not include hours of network content. Hours broadcast in the ITV Border region are included under England.

# Figure 2.15

## Cost per hour of total nations and regions output, by nation: 2009-2014



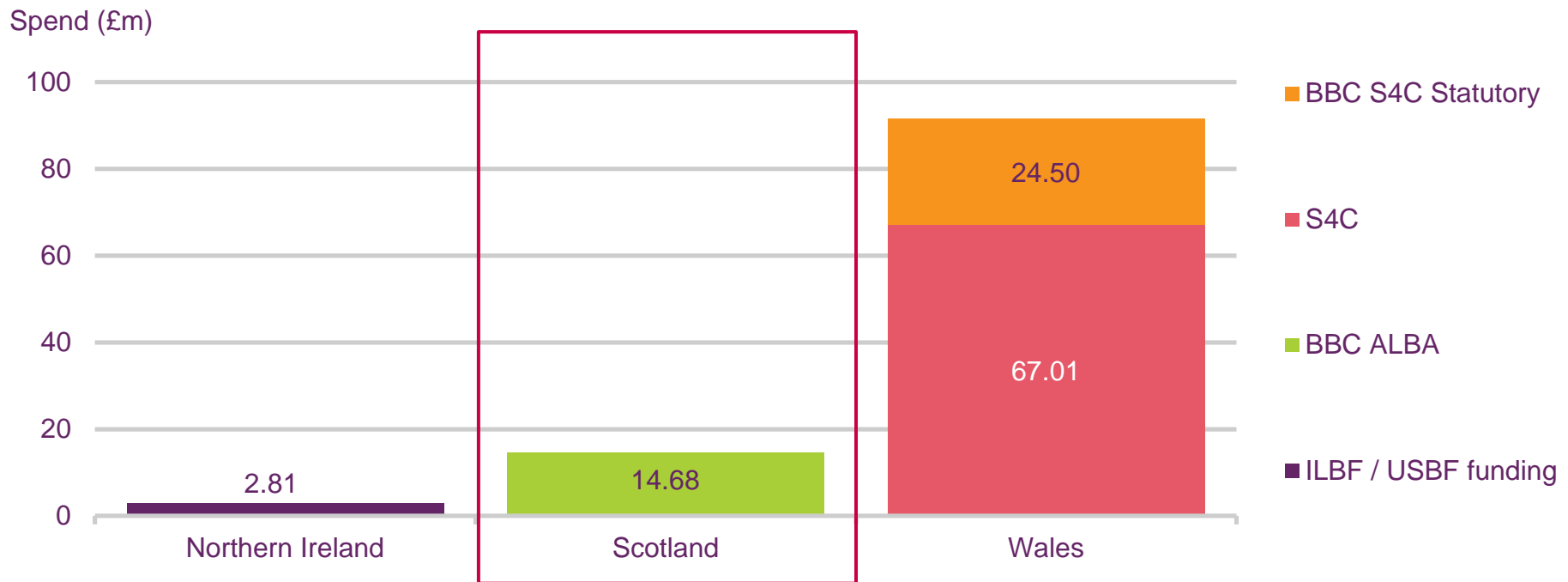
Source: Broadcasters. All figures are nominal

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England.



# Figure 2.16

## Other spend on other programming in the devolved nations: 2014

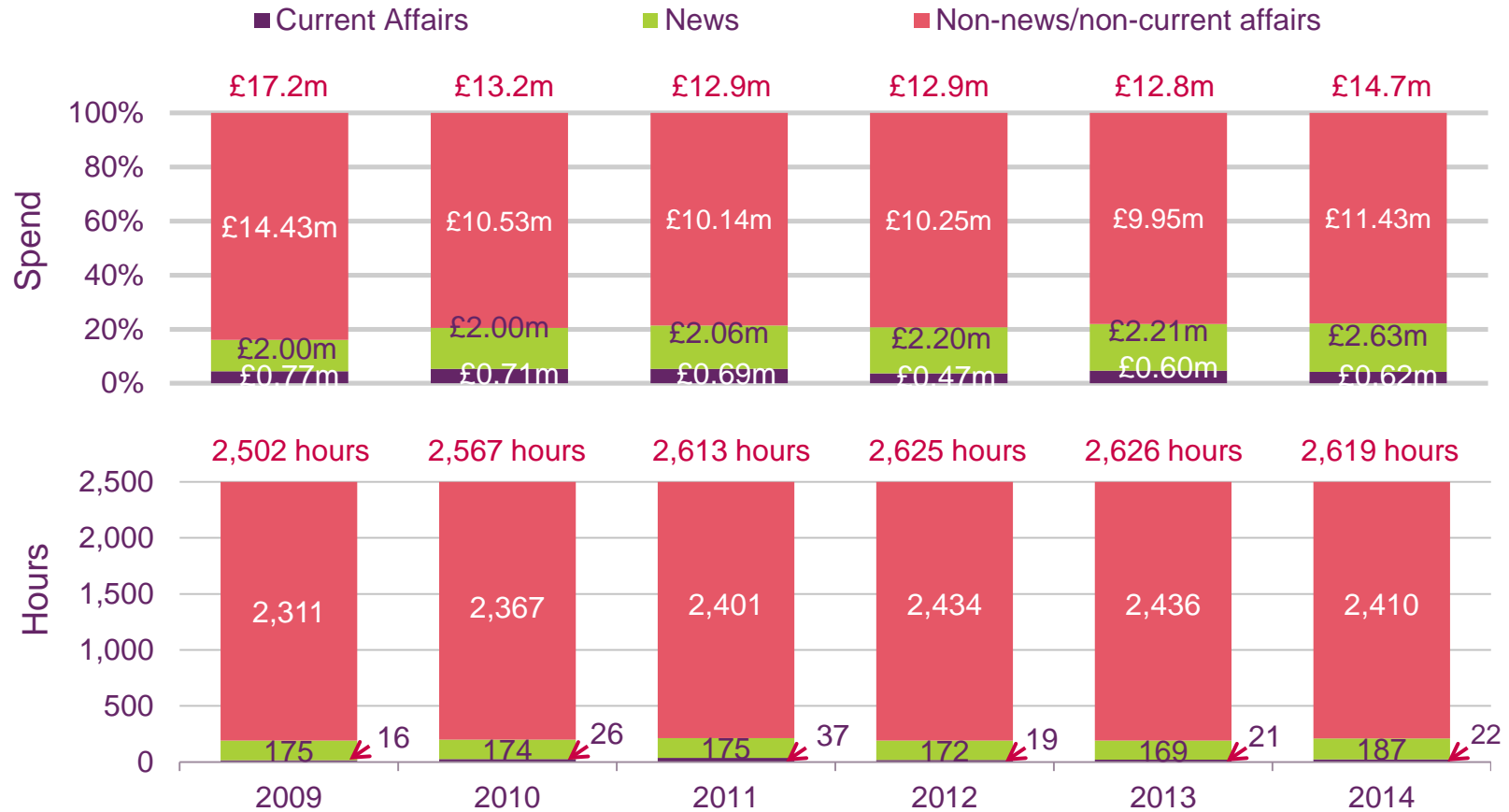


Source: Broadcasters.

Note: BBC S4C Statutory refers to the cost to the BBC of programming supplied to S4C by the BBC as part of their statutory agreement. ILBF / USBF refers to additional production contributions by the Irish Language Broadcast Fund and the Ulster Scots Broadcast Fund. BBC S4C Statutory and S4C figures cover the 2014/15 financial year, ILBF/USBF and BBC Alba figures cover the 2014 calendar year.

# Figure 2.17

## BBC Alba originations, by hours and spend, 2009 – 2014

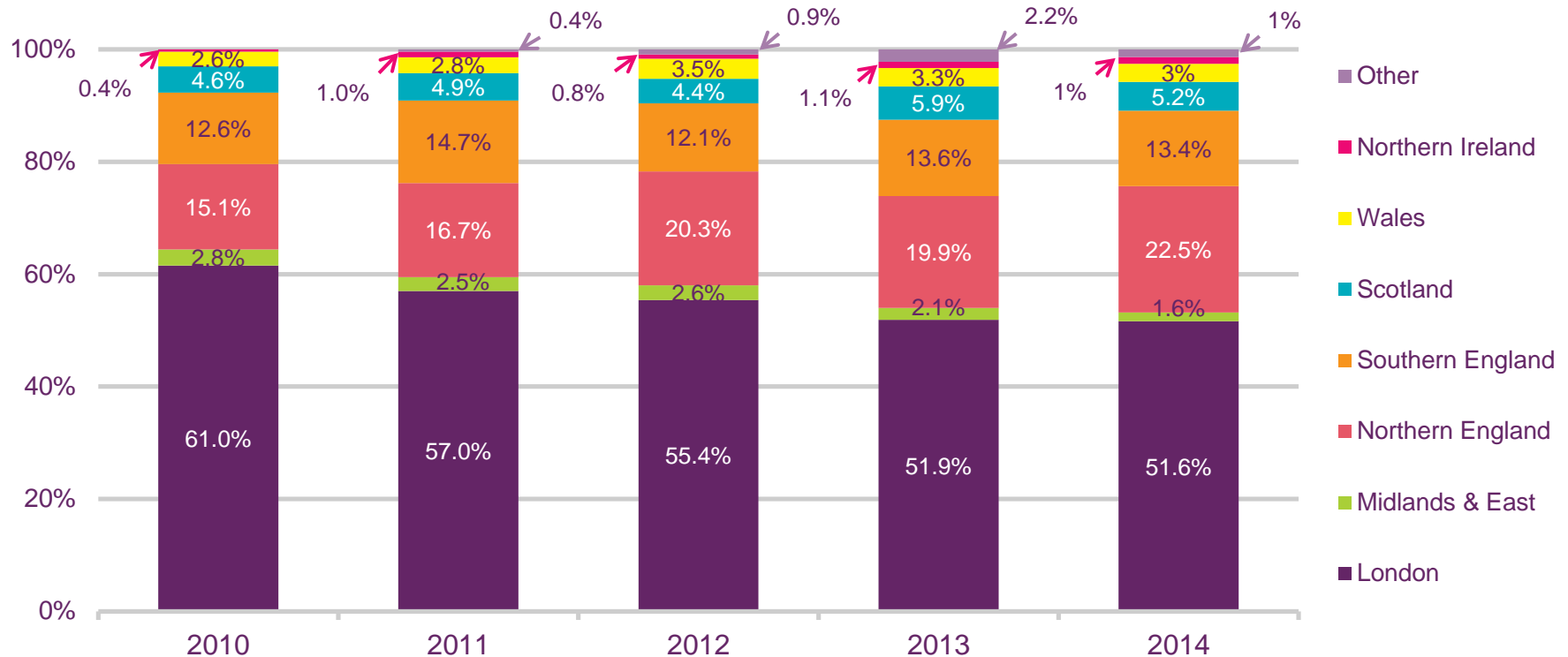


Source: BBC, total hours and spend. All figures are nominal.

# Figure 2.18

## Expenditure on originated network productions: 2010-2014

Percentage of production by value



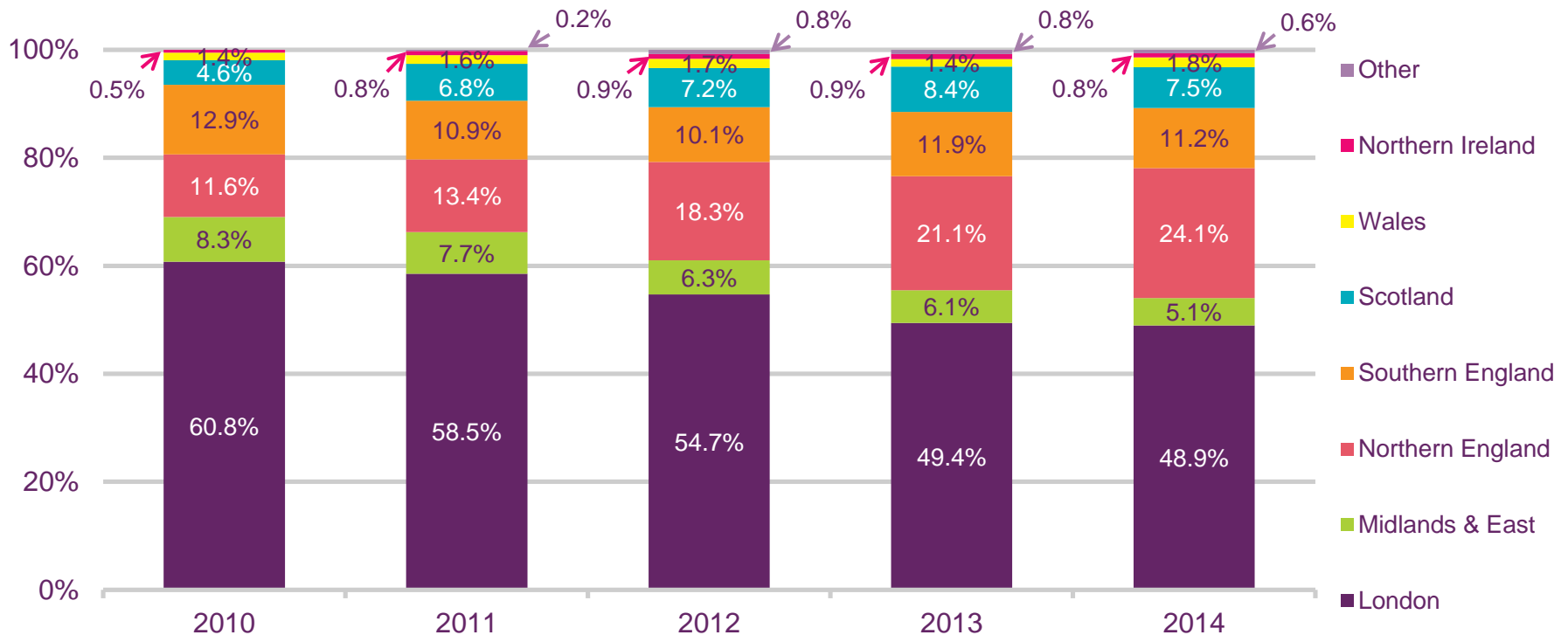
Source: Ofcom/broadcasters

Note: This expenditure does not include network news production. The category 'other' refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25 but not all in one macro-region, and therefore cannot be attributed to a single region. See [http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg\\_prod/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on Ofcom website for further details.

# Figure 2.19

## Volume of originated network productions: 2010-2014

Percentage of production by volume



Source: Ofcom/broadcasters

Note: These hours do not include network news production . The category 'other' refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25 but not all in one macro-region, and therefore cannot be attributed to a single region. See [http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg\\_prod/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on Ofcom website for further details.