

Annex 2.iii- TV viewing

UK and non-UK, first-run and repeat programming: PSB portfolios and multichannels

**PSB Annual Report
December 2014**

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- Background
- Definitions: channel groups
- Methodology
- Summary – all groups
- BBC portfolio group
- Channel 4 portfolio group
- All other multichannel group

Background

- This document provides bespoke analysis of viewing data provided by the Broadcasters' Audience Research Board (BARB). The analysis was undertaken by Attentional Ltd, a registered BARB Bureau.
- Attentional maintain a database of BARB programme data, and add to this a number of additional information fields that are not available from standard BARB datasets. These include repeat markings (based on listings data from a number of sources) and country of origin data, based on production company information. This allows BARB viewing data to be combined with custom fields to provide more in-depth analysis of UK broadcast output.
- This annex explores the provision of UK broadcast content among non-main PSB channels. It focuses on three groups; the BBC and Channel 4 portfolio of channels and all other remaining multichannels (including ITV and Channel 5 portfolio channels alongside all other broadcasters such as BSkyB and UKTV).

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Definitions: Channel groups used in top 100 programmes

BBC portfolio channels	Channel 4 portfolio channels	All Other multichannels
BBC Three	Channel 4+1	ITV+1
BBC Four	E4	ITV2
BBC HD	E4+1	ITV2+1
CBeebies	More4	ITV3
CBBC	More4+1	ITV3+1
	Film4	ITV4
	Film4+1	ITV4+1
	4Music	CITV
	4seven	Channel 5+1
		5*
		5*+1
		5 USA
		5USA+1
		All other multichannel stations excluding Sky Sports channels, BT Sport channels and sports genres

Channels include HD variants where applicable

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Top 100 programmes – Channel groups methodology

- A top 100 programmes list (based on the single best performing episode of a programme title) was created for each channel group chosen for this analysis. The top 100 programmes are based on the group as a whole rather than each channel individually. Data covers the period of 2013 only.
- The BBC portfolio group was based on channels BBC Three, BBC Four, BBC HD, CBBC and CBeebies.
- The Channel 4 portfolio group was based on Channel 4+1, E4, E4+1, More4, More4+1, 4seven, and 4Music.
- All other remaining channels, excluding the main five PSB channels and sports channels, were included in the multichannel data to create a top 100 for “everything else”.
- The channels that have contributed to the top 100 programmes for each of the three groups are then detailed in each chart.

Note: BARB viewing data includes viewing to any HD channel variants.

Top 100 programmes – reporting methodology

- Within each group, channels and their +1s (where applicable) were output as individual channels.
- Top 100s were selected by audience (000s) and highest transmission per unique title.
- Charts covering the three groups show the percentage output hours (net programme duration) vs the percentage of viewing (viewer hours: Duration x Audience 000s) classified by whether the programme is new or a repeat transmission and whether it is of UK or non-UK origin.
- Charts for the individual groups show the breakdown outlined above for the group as a whole, and then follows this with a further breakdown to show the contribution from each channel.

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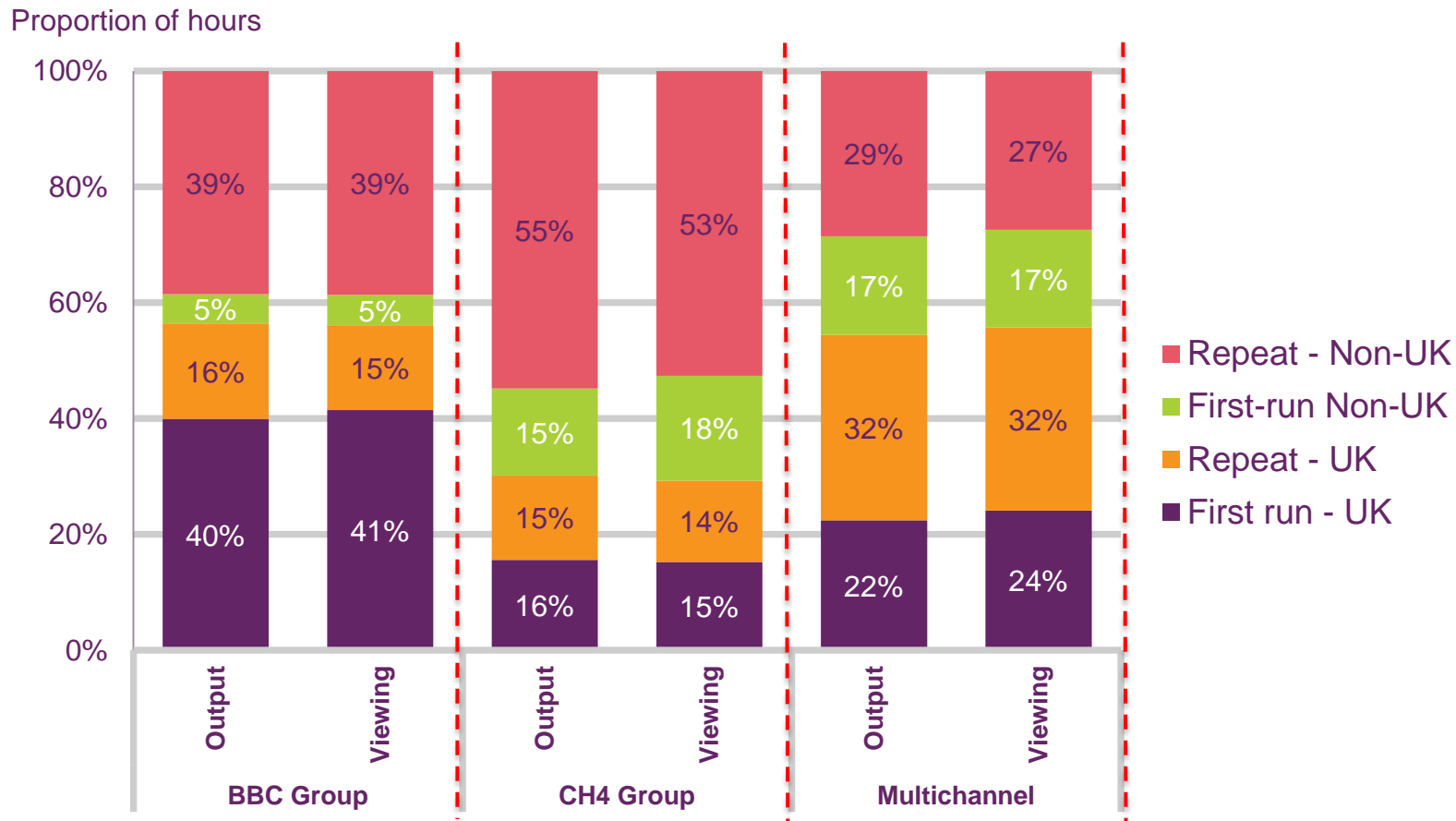
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Summary – BBC and Channel 4 groups and multichannels

- Based on the top 100 programmes for each group, the BBC channels had around double the proportion of first-run UK transmissions across the whole day (40% of output hours) compared with both the Channel 4 or multichannel group (Figure 1). This was followed by non-UK repeats comprising 39% of total output hours across the group. Viewing to these types of programming was almost equally split with first-run UK programmes generating 41% of viewing and non-UK repeats generating a further 39% of viewing. Total UK programming (first-run and repeats) accounted for 56% of output hours and yielded an equal proportion of viewing (56%).
- The multichannel group contained a greater proportion of first-run UK output hours among its top 100 most popular programmes (22%) than Channel 4 (16%). It also had the highest proportion of UK repeats transmissions (32%) and viewing (also 32%) of all the groups. Just behind the BBC group, total UK content represented 54% of output hours in the multichannel group but generated an equal amount of viewing share (56%) as the BBC group. The distribution between first-run and repeats is weighted towards UK repeats in this group (32% of hours and 32% of viewing) compared to the BBC group (16% of hours and 15% of viewing) (Figure 1).
- The Channel 4 group featured the highest proportion of non-UK repeat transmissions with over half (55%) of the output hours within the top 100 programmes dedicated to such programming. Non-UK repeats also accounted for the highest proportion of viewing among the Channel 4 group compared to the BBC and multichannel broadcaster groups at 53%. The proportion of UK repeats in both output and viewing hours is most similar to the BBC group while the distribution of first-run non-UK repeats hours and viewing in the Channel 4 group is comparable to the multichannel group. (Figure 1).

Figure 1

Proportion of output and viewer hours by first-run and repeats, top 100 programmes, all groups: all day



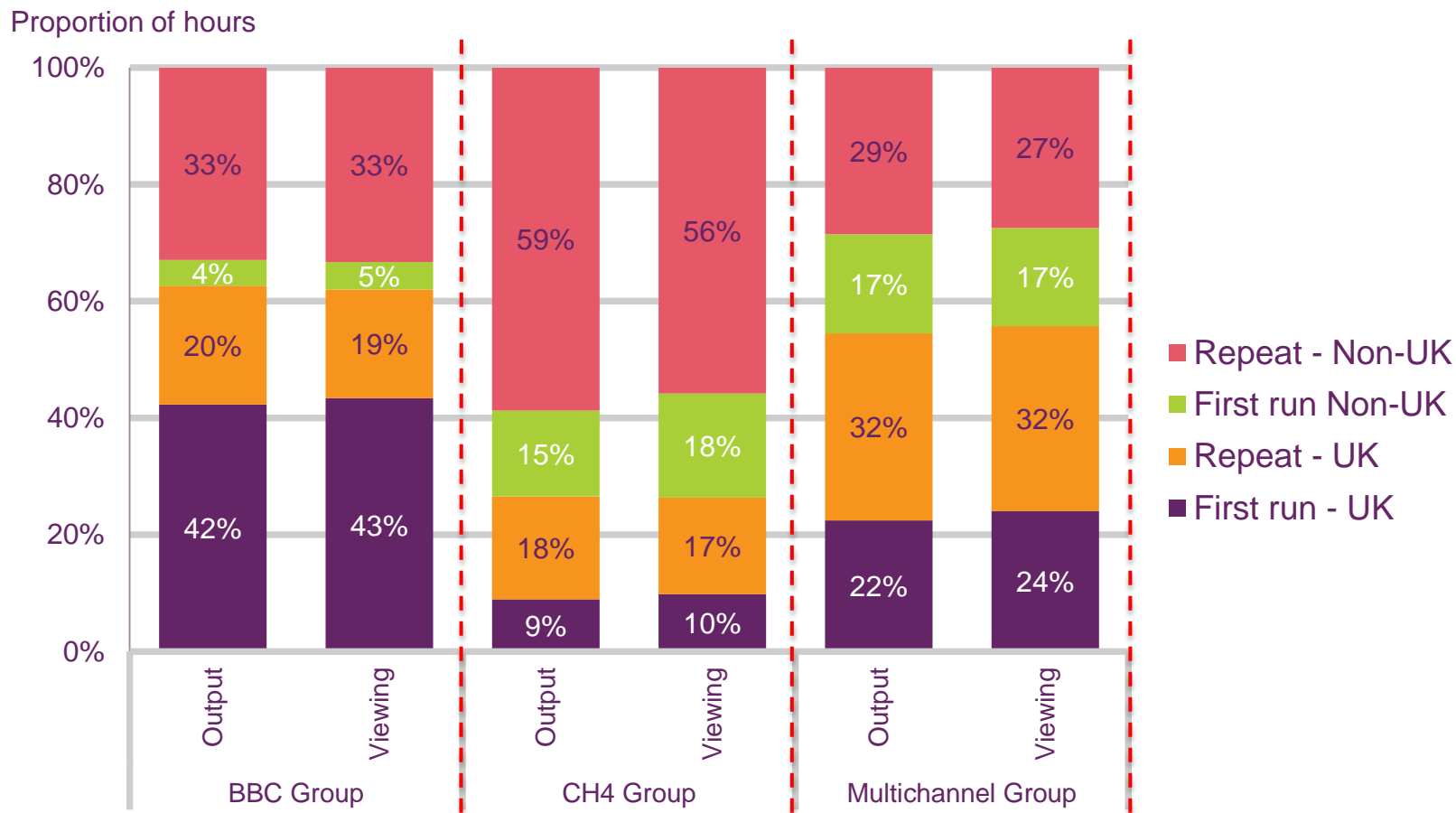
Source: BARB/Attentional repeat, country of origin information fields, Individuals 4+, Network, all day

Note: Data are based on the top 100 most popular episodes of programmes across each group of channels in 2013.

Figure 2



Proportion of output and viewer hours by first-run and repeats, top 100 programmes, all channel groups: peak time



Source: BARB/Attentional repeat, country of origin information fields, Individuals 4+, Network, peak time (6pm-10:30pm).

Note: Data are based on the top 100 most popular episodes of programmes across each group of channels in 2013.

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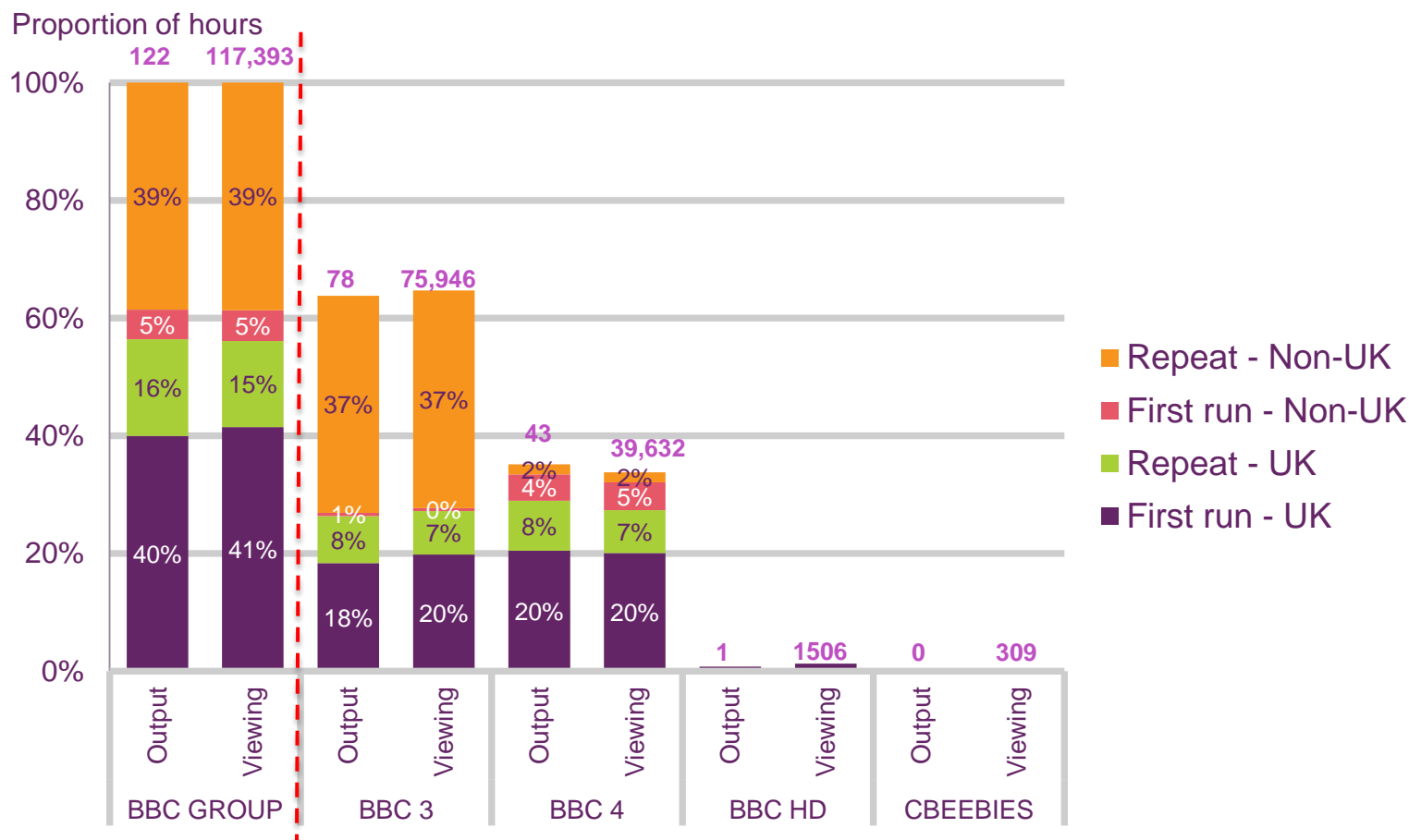
BBC portfolio group

- In both all-day and peak time viewing, UK made programmes (new and repeats) accounted for more than half of transmission time in the top 100 programmes across the BBC group of channels in 2013. It also accounted for the majority of viewing hours (Figures 3 and 4). Virtually all of the output and viewing hours were on BBC Three and BBC Four.
- The primary contributor to first-run UK content was BBC Four (20% of output which generated 20% of viewing) across the whole day. BBC Three accounted for 18% of output hours which yielded 20% of viewing. The 16% of UK repeats output across the BBC group was evenly distributed between BBC Three and BBC Four (8% each). The proportion of viewing generated from UK repeats on the channels were the same for both channels at 7% of viewing hours.
- BBC Three is notable for delivering 37% of the 39% of total output hours to non-UK repeats across the whole BBC group. It also delivered 37% of the 39% group viewing hours. Output and viewing hours to non-UK repeats constituted the majority of programming in the top 100 programmes of BBC Three.

Figure 3



Proportion of output and viewer hours by first-run and repeats, BBC portfolio group top 100 programmes: all day



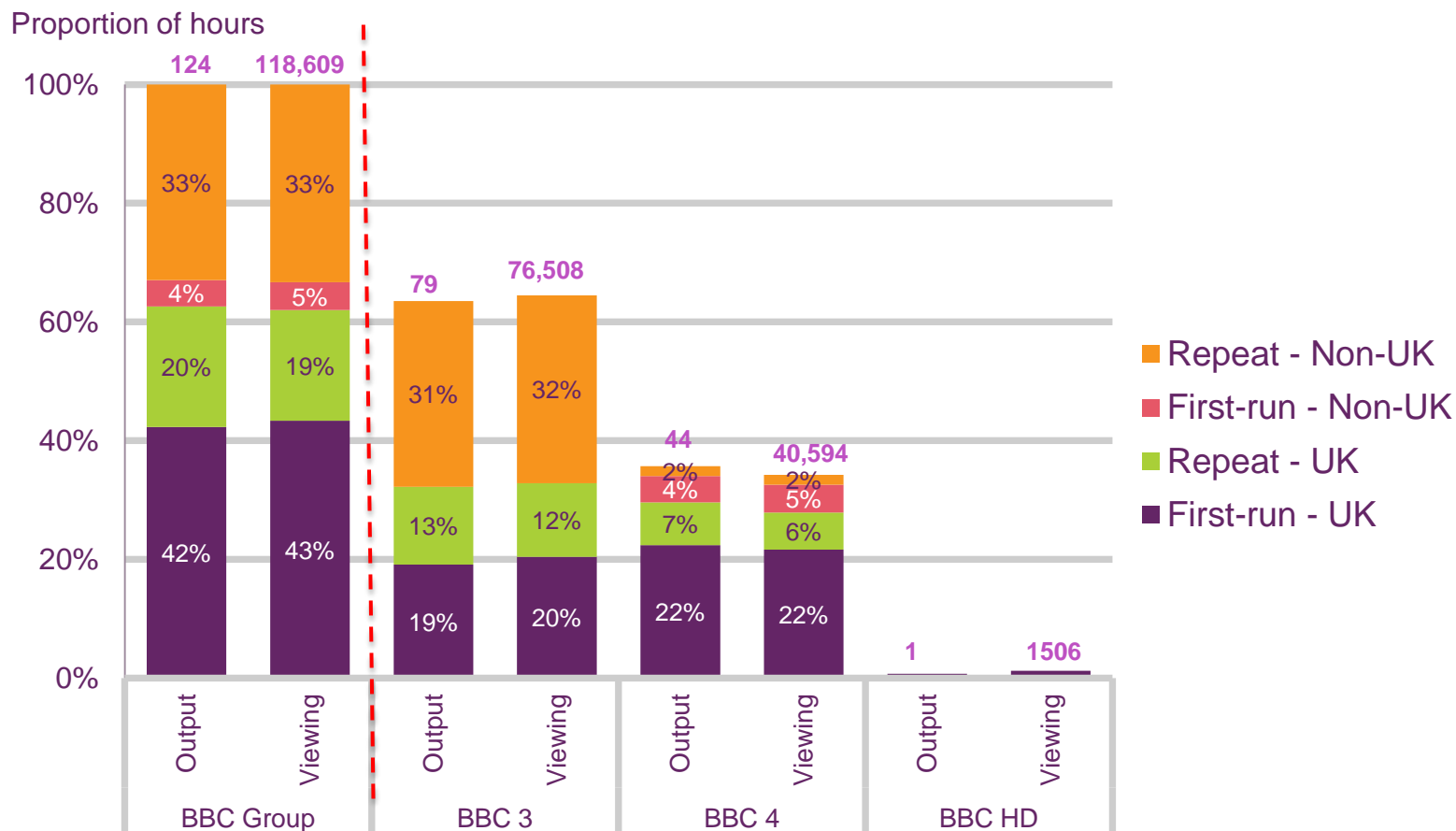
Source: BARB/Attentional repeat, country of origin information fields, Individuals 4+, Network, all day

Note: Data are based on the top 100 most popular episodes of programmes across the whole BBC portfolio of channels in 2013, broken down by channel

Figure 4



Proportion of output and viewer hours by first-run and repeats, BBC portfolio group top 100 programmes: peak time



Source: BARB/Attentional repeat, country of origin information fields, Individuals 4+, Network, peak time (6pm-10:30pm).

Note: Data are based on the top 100 most popular episodes of programmes across the whole BBC portfolio of channels in 2013 and broken down by channel

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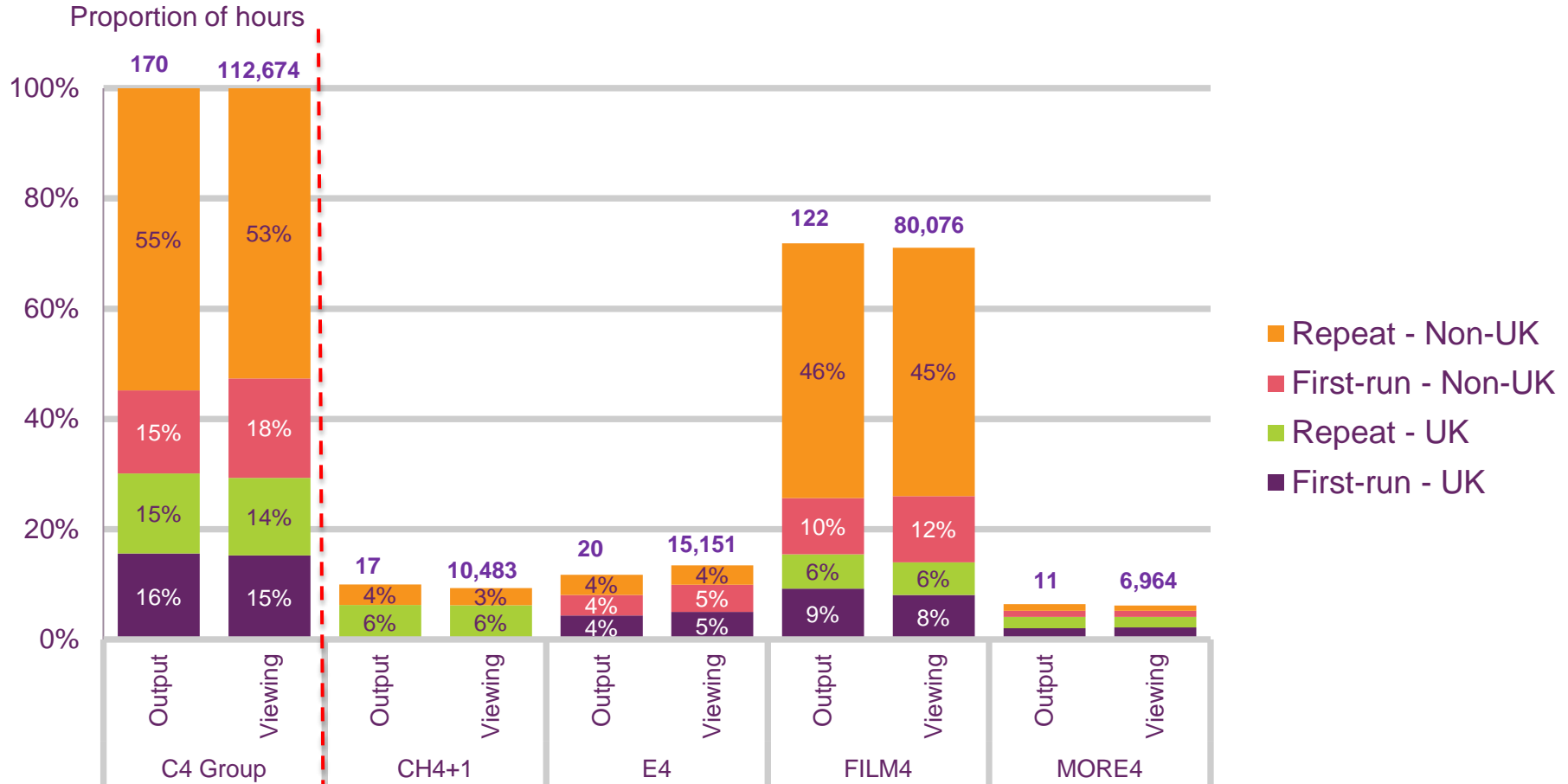
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Channel 4 portfolio group

- The top 100 programmes across the Channel 4 portfolio group were mainly on Film4 (56 of the most popular programmes were on the channel). Across the portfolio, programming primarily comprised non-UK repeats (55% of output hours and 53% of viewing) (Figure 5).
- Much of these were on Film4 (46% of output and 45% of viewing) which featured 35 non-UK repeat programmes in the top 100 most popular programme titles across the Channel 4 portfolio. The remainder of the hours and viewing to non-UK repeats were mainly on Channel 4+1 and E4.
- In peak time, the proportion of output hours attributed to non-UK repeats in the top 100 programmes increased while first-run UK decreased with much of this shift attributed to Film4. A corresponding pattern can be seen in the viewing proportions generated by these types of programming. The proportion of first-run non-UK hours and viewing remained the same in all time and peak time while UK repeats increased marginally (Figure 6).

Figure 5

Proportion of output and viewer hours by first-run and repeats, Channel 4 portfolio group top 100 programmes: all day



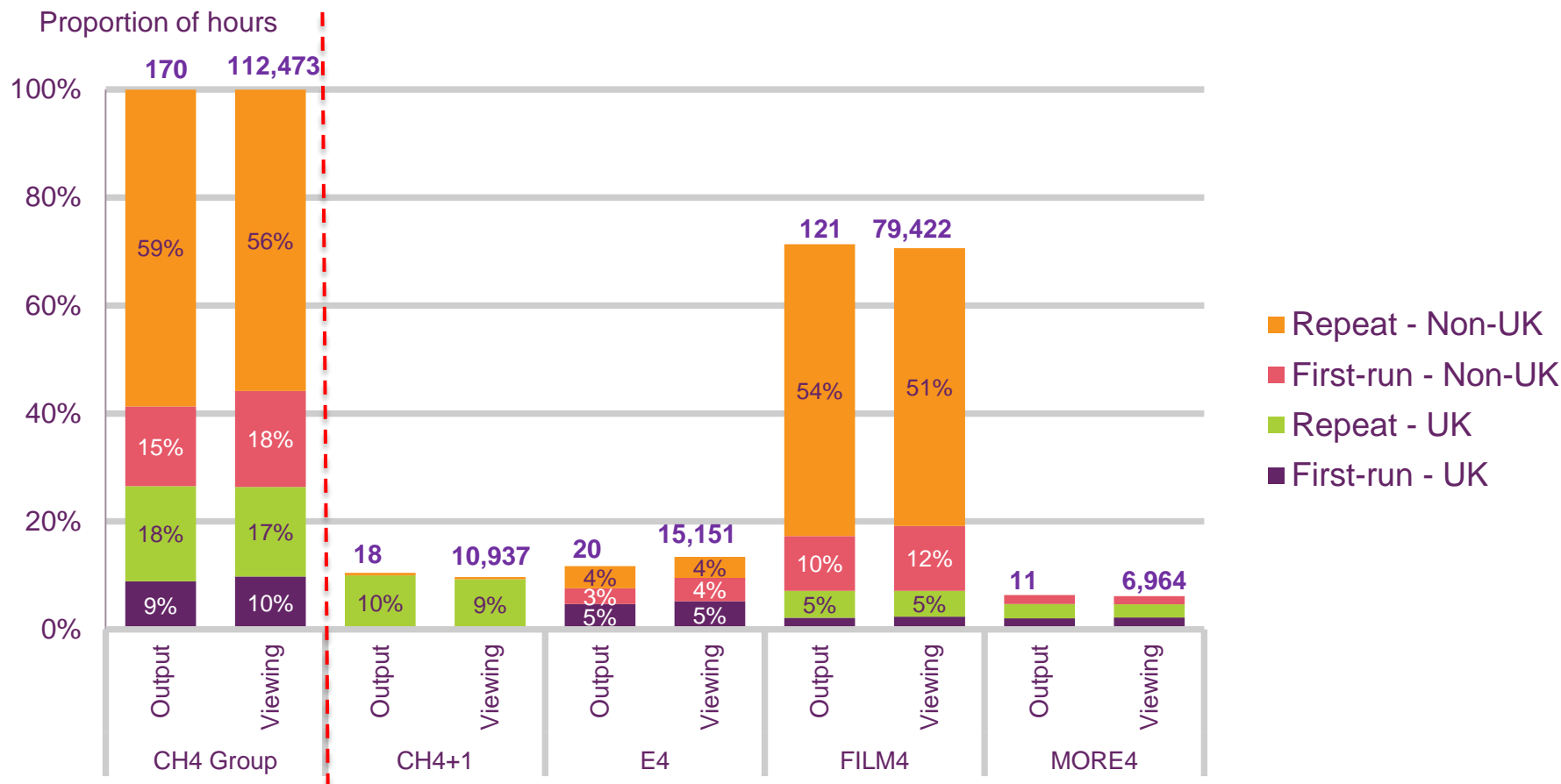
Source: BARB/Attentional repeat, country of origin information fields, Individuals 4+, Network, all day.

Note: Data are based on the top 100 most popular episodes of programmes across the Channel 4 portfolio of channels in 2013 and broken down by channel

Figure 6



Proportion of output and viewer hours by first-run and repeats, Channel 4 portfolio group top 100 programmes: peak time



Source: BARB/Attentional repeat, country of origin information fields, Individuals 4+, Network, peak time (6pm-10:30pm).

Note: Data are based on the top 100 most popular episodes of programmes across the Channel 4 portfolio of channels in 2013 and broken down by channel

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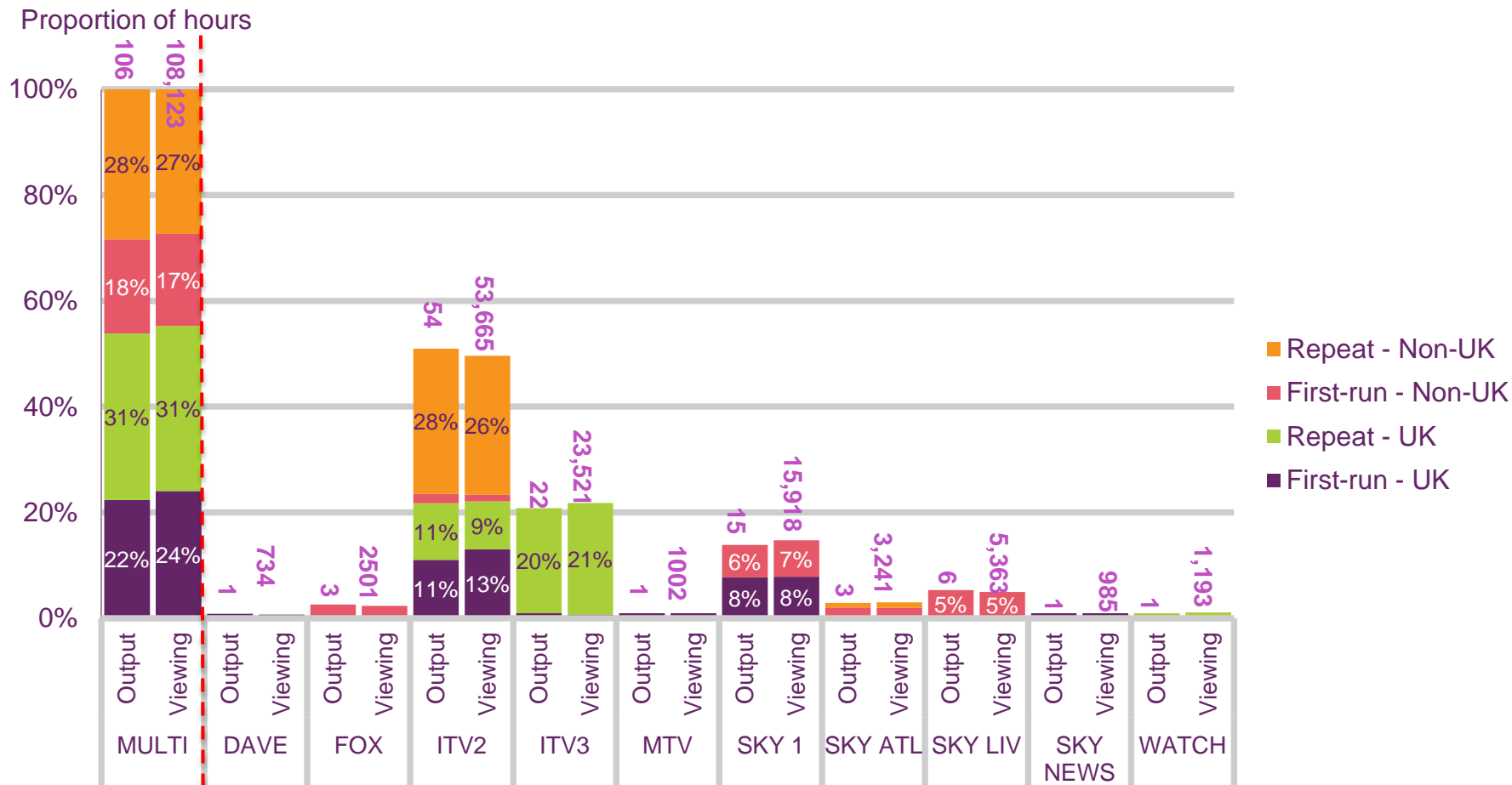
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Multichannels group

- UK programming (new and repeats) accounted for more than 50% of output hours and viewing across the top 100 programmes to the multichannels group, in both all time and peak time. In terms of distribution, the greater proportion (31%) of output hours was to UK repeats across all time (with the remainder of 22% attributed to first-run UK programming) (Figure 7).
- By channel, the largest proportion of UK programming in the top 100 was provided by broadcasters ITV and Sky, with ITV2 and Sky 1 providing the highest proportion of first-run UK programming – 11% and 8% respectively in all time (Figure 7) and 11% and 10% in the peak time top 100 (Figure 8).
- ITV3 contributed two thirds (20%) of the total 31% share of UK repeats output among the total multichannel group in all time. In peak time 22% of UK repeat output was delivered by the channel, yielding 23% of the 32% of all viewing to the multichannel group (Figure 9).
- Sky Living and Sky Atlantic both made modest contributions to the top 100s, with all programmes being non-UK. Sky Living contributed 5% to first-run non-UK output in both all-day and peak time top 100 programmes.

Figure 7

Proportion of output and viewer hours by first-run and repeats, multichannel top 100 programmes: all day



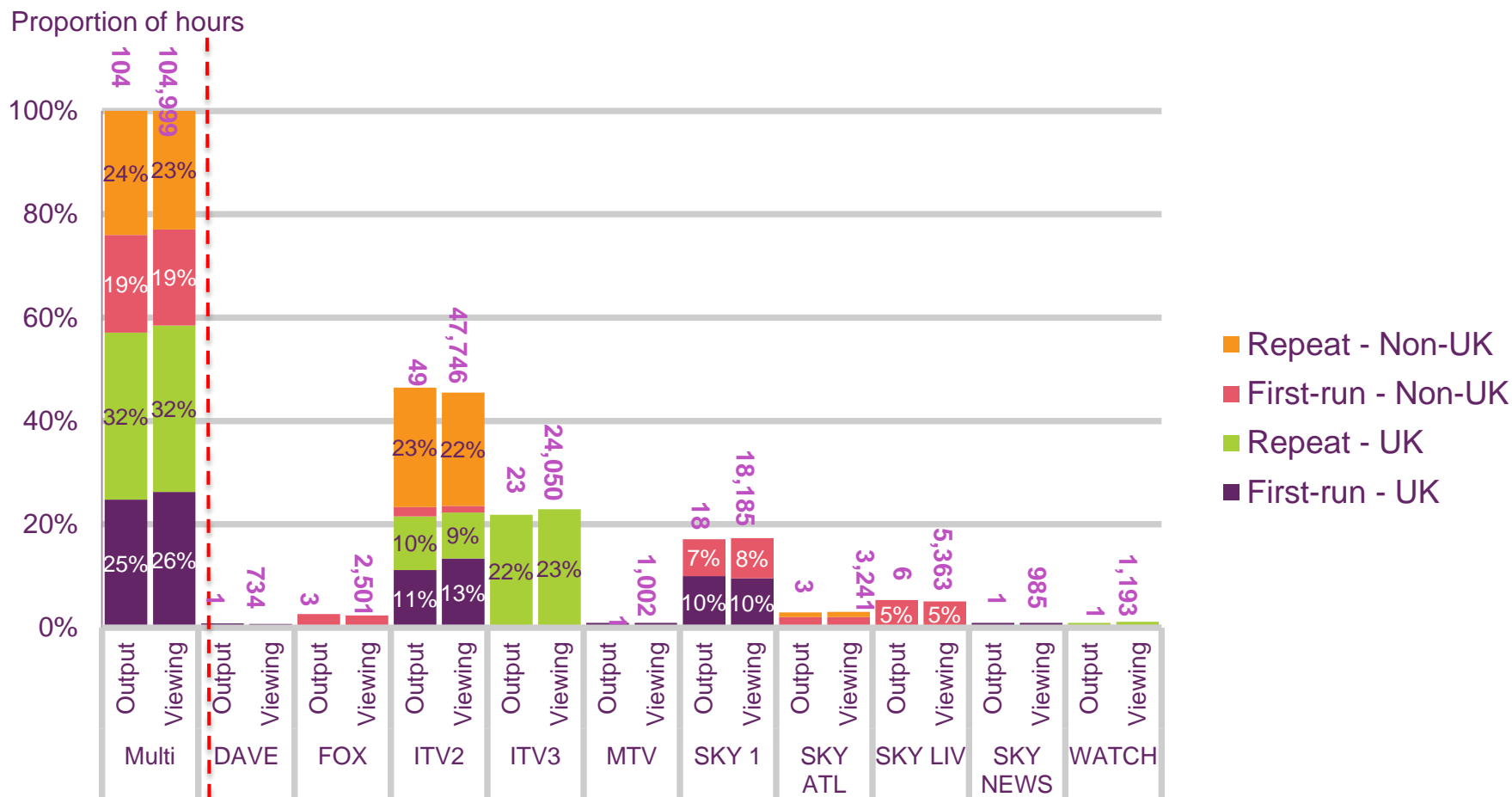
Source: BARB/Attentional repeat, country of origin information fields, Individuals 4+, Network, all day.

Note: Data are based on the top 100 most popular episodes of programmes across the whole group of multichannels in 2013 and broken down by channel

Figure 8



Proportion of output and viewer hours by first-run and repeats, multichannel top 100 programmes: peak time



Source: BARB/Attentional repeat, country of origin information fields, Individuals 4+, Network, peak time (6pm-10:30pm)

Note: Data are based on the top 100 most popular episodes of programmes across the whole group of multichannels in 2013 and broken down by channel.