PSB Annual Research Report 2017

Research Document

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About this document

Ofcom has a duty to review periodically the designated public service broadcasters in terms of their provision of television services which, taken together, fulfil the purposes of public service broadcasting as set out in the Communications Act 2003. The PSB Annual Research Report was one of the outcomes of Ofcom's first PSB review and serves to provide an evidence base for monitoring the delivery of PSB, taken as a whole.

The report provides information about how the television public service broadcasters are performing in terms of delivering public service programmes. The public service broadcasters are those providing Channel 3 services, Channel 4, Channel 5, S4C and the BBC. While all BBC public service television channels are PSB channels, only the main channels of each of the other PSBs have this status.

The report looks at what these broadcasters are spending on programmes and the amount of different types of programmes they show. It also looks at the extent to which audiences are watching public service programmes, and how satisfied they are with them. The document is focused on data from the broadcasters themselves (output and spend), on industry data (BARB data) and on feedback from audiences via a tracking survey. Interpretation of that evidence is beyond the scope of this document; policy implications may be covered elsewhere using this as an evidence resource.

Alongside its PSB reviews, Ofcom has a specific duty to carry out reviews of the extent to which Channel 4 Corporation has discharged its media content duties. Ofcom published such a review in 2015 and has also published its responses to Channel 4 Corporation's annual statements of media content policy.

At the time of publication, Ofcom is consulting on a BBC operating licence which will impose a set of new regulatory conditions on the BBC. The BBC's compliance with these will in future will be covered in a separate annual report on the BBC, and the consultation also sets out Ofcom's proposal to publish annually a research report providing an overview of the BBC's performance.

This is an annual statistical report: the 2017 edition includes data for the whole of the calendar year 2016.

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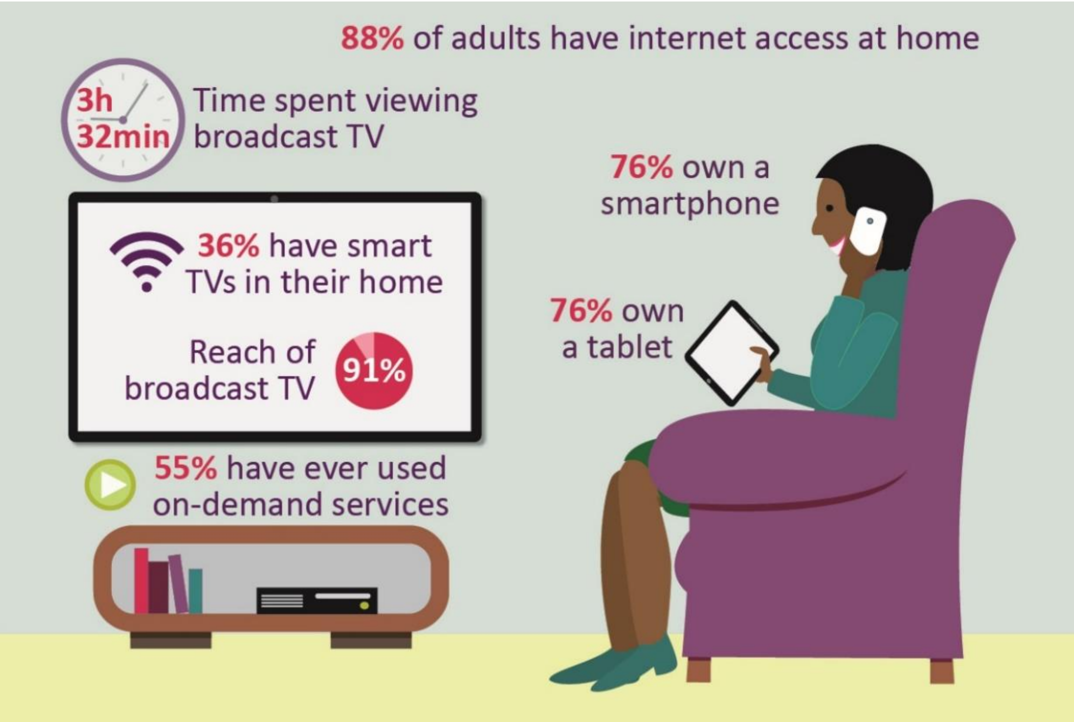
Executive summary

Market context



Sources: Ofcom Technology Tracker H1 2017, base: all adults aged 16+.
BARB, individuals 4+, network, total TV. Average hours and minutes of viewing per day.

Fast facts: PSB channels 2016

Sources: BARB, all individuals (4+), network. Ofcom PSB tracker 2016, UK adults aged 16+. Ofcom / broadcasters

Television viewing is changing, but the PSBs remain at the heart of the overall audience experience

The television landscape is changing; people are increasingly viewing content in a variety of different ways, both on the television set and on other devices. Young adults are watching a substantial amount of non-PSB content, and behavioural changes are happening not just in this group, but among those up to the age of 45.

Despite the changes in the ways in which people watch television, overall viewing on the TV set is resilient; each week 85% of people in the UK who have a TV in their household watch PSB channels. Public service broadcasters remain at the heart of the UK's television viewing experience.

There is a widening gap between the viewing habits of the youngest and oldest audiences

Individuals in the UK watched 3 hours 32 minutes of measured broadcast TV on a TV set in 2016. This is 4 minutes a day (2%) less than in 2015. However, there are big differences between age groups, and these gaps are widening. Viewers aged 65+ watched an average of 5 hours 44 minutes in 2016, just three minutes less than in 2012; in contrast, 16-24 year olds watched an average of 1 hour 54 minutes in 2016, 43 minutes less than in 2012. Between 2015 and 2016, average daily viewing among children and 16-24 year olds each fell by 10 minutes, whereas viewing by over-64s increased by 2 minutes.

Watching on-demand television is increasingly popular, especially among younger viewers

Measurements of broadcast television viewing and reach are based on the official industry BARB data, which measures the viewing of scheduled TV programmes on TV sets, and includes time-shifted viewing of these programmes. However, a substantial amount of viewing is not covered by BARB, and this type of viewing is highest among younger people. GfK survey data estimate that there are large daily amounts of time of non-broadcast viewing of video/TV content, especially among viewers in the pre-family life stage, who watch an average of about 2.5 hours per day of non-broadcast content, on any device.

Viewers continue to watch the PSB channels

The majority of people in the UK with a TV in their household watch the PSB channels on a weekly basis. In 2016, 83% of the TV population aged 4+ watched any of the main five PSB channels in a typical week. This increases to 85% when the BBC portfolio channels are included.

Half of all broadcast TV viewing on TV sets is to the main PSB channels

Although viewing to the main PSB channels has declined over the last ten years, half of all TV viewing time continues to be to these channels. There has been substantial growth over time in viewing to the PSBs' 'portfolio' channels, going some way to offset the decrease in viewing to the main PSB channels. Overall, when all the TV channels of the PSB broadcasters are taken into account, they represent 70% of total broadcast TV set viewing, down from 76% in 2006.

Public service broadcasting remains highly valued and satisfaction with many aspects is increasing

Overall, 78% of regular or occasional viewers of any PSB channel claim to be satisfied with PSB broadcasting, significantly higher than in 2015 (73%).

As in 2015, PSB viewers considered the most important purpose was purpose 1: '*Informing our understanding of the world*'. Viewers had the highest level of satisfaction with delivery against this purpose: 75% agreed that '*PSB news programmes are trustworthy'* (up by 5pp since 2015), 77% agreed that programmes '*help them understand what's going on in the world today'* (up 3pp) and 75% agreed that regional news programmes provide a wide range of good quality news about their area (up 5pp).

As in 2015, the lowest rating for perceived delivery was for *'it portrays my region/nation fairly to the rest of the UK*'; 63% agreed with this statement. However, this is a significant increase since 2015 (56%).

PSB channels' spend on all new UK network programmes increased in 2016

The PSB channels spent a total of £2.6bn on first-run UK-originated content in 2016, a 2% increase in real terms on 2014 (the most recent comparable year due to the impact of major sporting events). This was an 18% decrease in real terms on 2006, with each of the main five PSB channels reducing their spend over the intervening period. At £582m, spend on new UK factual programming across the PSB channels was greater than any other genre in 2016. Spend on new UK content at peak time stood at £1.6bn in 2016.

In 2016, the PSB channels broadcast the greatest number of first-run UK-originated hours since 2008

At 32,988 hours, the PSB channels broadcast more hours of first-run UK originations in 2016 than in any year since 2008. Each of the main five PSB channels had annual increases in such hours, with the exception of BBC Two, down by 2% compared to 2015.

Spend on first-run UK originations for viewers in the nations and regions increased in 2016

In a year of devolved parliamentary and assembly elections, spend on new, non-network originations for viewers in the nations and regions reached £276m in 2016, a 2% increase in real terms since 2015.

Market context

Since the launch of Freeview (in 2002) and then the full shift to multichannel with the completion of digital switchover, UK households have had a greater choice of channels through Freeview and pay-TV. This growth in choice has led to a decline in viewing to the main five PSB channels (from 77% share in 2002 to 51% in 2016), although much of this shift in viewing has been to the PSBs' own portfolio channels.

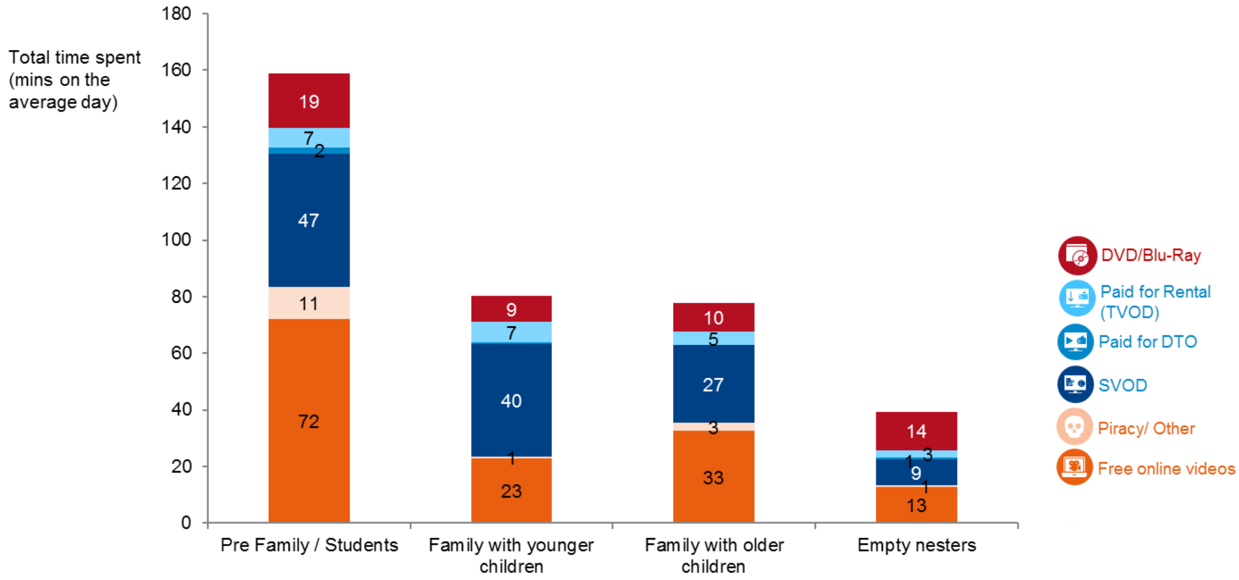
The take-up of devices and services has grown substantially; at the beginning of 2017, 88% of adults had internet access at home, 76% owned a smartphone and 76% a tablet. Smartphone use on the move has changed as 4G service has become widely available, and the take-up of smart TVs has grown from 5% in 2012 – 36% of adults have one in their home in 2017.[1]

Video-on-demand (VoD) services are widely used; most adults claimed to have ever used them, and almost half of all adults had done so in the previous week. The VoD services from broadcasters, including BBC iPlayer and ITV Hub, are the biggest players in the VoD market; less than half the number of adults who had used VoD in the previous week had used subscription VoD (SVoD) services like Netflix or Amazon Prime Video, or pay-per-view services like iTunes. VoD services provide alternatives to traditional broadcast TV, and for some audiences, especially younger ones, the amount of this type of viewing is significant.[2]

There is as yet no industry-agreed measure of total audio-visual (AV) viewing across all screens and platforms, but there are several sources that use different methodologies to estimate total AV consumption. GfK provides survey-based data that record the amount of time internet users spend watching AV content that is not broadcast TV (across all devices). This shows us that among the online population, large daily amounts of non-broadcast viewing of video/AV content are taking place. This is especially apparent among students and people in the pre-family life-stage demographic (about 2.5 hours per day of non-broadcast content). We also know from BARB data that younger viewers are watching increasingly fewer minutes of broadcast TV each year. Empty nesters (older people in households without children) have lower levels of non-broadcast viewing.

[1] *Ofcom Technology Tracker. Half 1 2017. Base: all adults aged 16+*
[2] *Ofcom Technology Tracker. Half 1 2017. Base: all adults aged 16+*

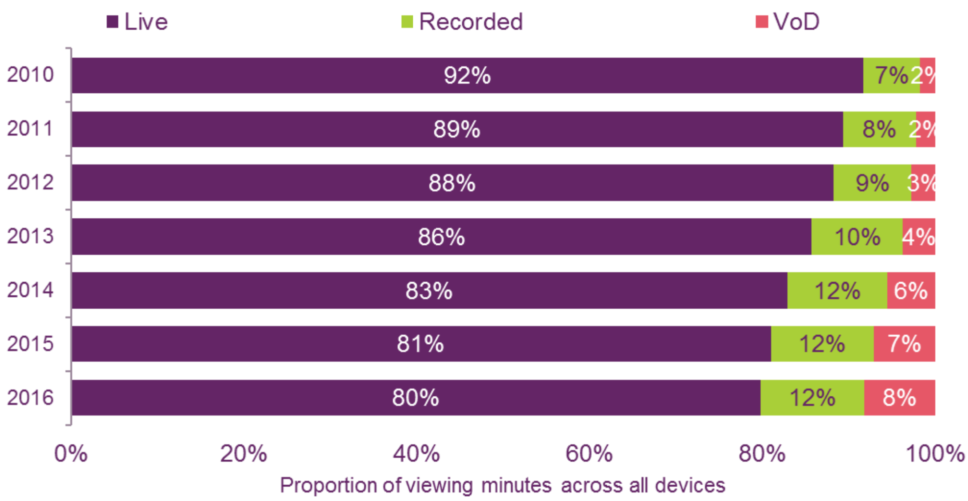
Figure 1 Non-broadcast consumption, by life-stage: 2017



Source: GfK ViewScape 2017, total time spent viewing non-broadcast content on the average day, on any device. Base: All UK online adults (n=1347), Pre-family/students (n=418), Family with younger children (n=300), Family with older children (n=291), empty nesters (n=265). DTO = download to own, SVoD = subscription video-on-demand.

3 Reasons provides estimated trend data over seven years for viewing minutes, on all devices, to all long-form, lawful content. This shows that live viewing fell from 92% of this total viewing time in 2010 to 80% in 2016. The proportion of time spent viewing recorded and VoD content has increased, but although viewing of recorded content has been flat in the last three years, viewing of VoD content has continued to grow, to 8% of total viewing time.

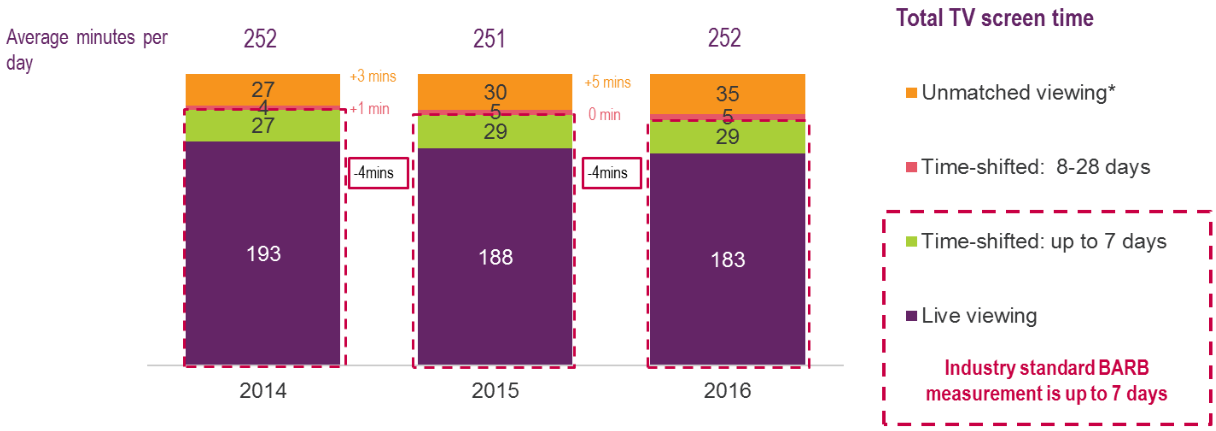
Figure 2 Proportion of all AV viewing, live TV, DVR and VoD: 2010-2016



Source: 3 Reasons estimates (including BARB data). Base: All devices, lawful long-form professional AV content. Excludes DVD, short-form, pirated and adult content. Live includes simulcast.

While BARB does not provide AV figures across all devices, it does give us figures for the total time spent watching any AV on the TV set, split by type of viewing. This shows us that the total time spent watching something on the TV set has been relatively stable from 2014 with "unmatched viewing" making up for the declines in broadcast TV viewing.

Figure 3 Average daily minutes of TV screen time – total TV, 2014-2016



Source: BARB, individuals 4+, total TV. Average minutes of viewing/day.
**Note: Unmatched viewing = 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. Audio-matched digital radio stations (which accounted for 2 minutes of viewing time per person a day in 2016) are excluded. Unmatched viewing has been reported by BARB since July 2013. Dotted line marks difference between BARB standard industry data and the eight-28 day time-shifted and unmatched viewing.*

All of this provides a backdrop to the PSB Annual Research Report 2017, which reports on the performance of the UK's public service broadcasters (PSBs) in 2016, with a particular focus on shifts over time. The designated public service broadcasters in 2016 were the BBC, Channel 4 Corporation (C4C), Channel 5, the holders of the Channel 3 licences (ITV, STV and UTV), and S4C. While all BBC public service television channels are PSB channels (those we term here 'BBC portfolio channels'), only the main channels of each of the other PSBs have this status.

As technology evolves and consumer behaviour changes, business models are also evolving. The advertising market has undergone structural change, with online revenue growing and the distribution of advertising shifting away from print media in favour of online. As a result, some broadcasters are changing their business models to pursue alternative sources of revenue (e.g. content sales, online advertising). Increased competition in pay TV has resulted in increasing investment in original content beyond the PSBs; the increasingly global nature of the content production market has led to growth in co-produced content from multichannel operators e.g. Sky; and there have been some notable investments by SVoD providers in original content, exclusively available on their services.

PSB in context

Ofcom's duties

While the markets in which the PSBs operate are changing rapidly, Ofcom has a number of specific duties in relation to public service television broadcasting. This includes a duty, as set out in section 264 of the Communications Act 2003, to review periodically the extent to which the designated public service broadcasters (PSBs) have provided relevant television services which (taken together) fulfil the purposes of public service broadcasting, as summarised below. Our third PSB review was published in 2015.[3]

Ofcom's first PSB review stated that Ofcom would develop a new approach to assessing the effectiveness of the public service broadcasters, taken together, in delivering public service broadcasting.[4] The PSB Annual Research Report was one of the outcomes of this first review and serves to provide an evidence base for monitoring the delivery of public service broadcasting. It offers a factual account of broadcast hours dedicated to fulfilling the purposes of public service broadcasting, spend on such hours, viewing figures, and audience opinions. The results from Ofcom's PSB Annual Research Reports inform our periodic reviews.

The Digital Economy Act 2010 extended Ofcom's duties when carrying out a PSB review[5] to include a review of the extent to which material provided in other television and radio services, on demand and online,[6] contributes to the fulfilment of the public service objectives. However, the data in this report serve to assess those channels that hold PSB status; other services fall outside the scope of the report.

PSBs and PSB channels

Figure 4 **Public service broadcasters and the PSB channels: 2016**

Public ServiceBroadcaster	PSB Channels
BBC	BBC One, BBC Two, BBC Three, BBC Four, BBC News, BBC Parliament, CBBC,CBeebies, BBC Alba
ITV plc	ITV, UTV
Channel Four Television Corporation	Channel 4
Channel 5 Broadcasting Ltd	Channel 5
STV Group	STV
S4C	S4C

There were changes in the PSB landscape in 2016. BBC Three ceased broadcasting as a

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[3] *Public Service Broadcasting in the Internet Age,* available at http://stakeholders.ofcom.org.uk/consultations/psb-review-3/statement/
[4] http://stakeholders.ofcom.org.uk/binaries/consultations/psb3/psb3.pdf
[5] By introducing section 264A of the Communications Act 2003.
[6] Online services are covered where there is a person who exercises editorial control over the material included in the service.

PSB channel on 15 February 2016, and began operating as an internet-only service from that date. CBBC began broadcasting until 9pm in the evening, having previously been on air only until 7pm.

On 29 February 2016, UTV Media plc completed the sale of UTV to ITV plc.

The commercial PSBs supplement their PSB channel output with programming on their ‘portfolio’ channels. Although we do not look at this in detail in this report, we do sometimes look at viewing data for these channels when considering the share of PSB families as a whole.

PSB purposes and characteristics

The statutory purposes and objectives of public service broadcasting are set out in section 264 of the Communications Act 2003. In Ofcom’s first PSB Review[7], we built on these, following extensive research and consultation, creating a framework of PSB purposes and characteristics which we continue to use in our reports today. This is summarised in Figure 5 and Figure 6.

Figure 5 **PSB purposes**

PSB purposes
Informing our understanding of the world To inform ourselves, and others, and to increase our understanding of the world through news, information and analysis of current events and ideas.
Stimulating knowledge and learning To stimulate our interest in, and knowledge of, arts, science, history and other topics, through content that is accessible and can encourage informal learning.
Reflecting UK cultural identity To reflect and strengthen cultural identity through original programming at UK, national and regional level; on occasion bringing audiences together for shared experiences.
Representing diversity and alternative viewpoints To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere.

[7] See above, footnote [4]

Figure 6 **PSB characteristics**

PSB characteristics
High Quality Well-funded and well-produced
Original New UK content rather than repeats or acquisitions.
Innovative Breaking new ideas or re-inventing exciting approaches, rather than copying old ones.
Challenging Making viewers think.
Widely available If content is publicly funded, a large majority of citizens need to be given a chance to watch it.
Distinctive

The need for public service output to be 'distinctive' was added as a characteristic in 2014, following research showing that viewers, particularly younger, more tech-savvy consumers, were no longer able to distinguish between PSB channels and non-PSB channels.[8]

The evidence base for reporting on the delivery of public service broadcasting which meets the purposes and characteristics set out above covers three distinct areas:

- Audience opinion of PSB channels
- PSB channel audience viewing on TV sets
- PSB channel output and spend

[8] *Public service content in a connected society*, page 23
http://stakeholders.ofcom.org.uk/binaries/consultations/psb-review-3/summary/PSBR-3.pdf

Audience opinions

In this section, the results have been taken from Ofcom's PSB tracker research. This tracker measures TV audiences' opinions on the overall importance of PSB, in terms of the purposes and characteristics, as well as the importance and delivery of individual PSB channels.

Methodology

In previous years, the PSB tracker research was conducted through telephone interviews throughout the year. In 2015 the methodology was changed to collect data using a split sample of online and face-to-face interviews, during two one-month interview periods. The data collected from these two sources have been combined to provide the 2015 result.

For 2016, the split sample of online and face-to-face interviewing has continued. Further details of the methodology can be found in Annex D of this report. Significant differences between 2015 and 2016, referenced below, are measured at the 99% difference level, while significant differences within 2016 are measured at the 95% difference level.

Results

All respondents were asked on a scale of 1-10 the *importance* of the individual PSB purposes and characteristics (see section 1 for details on each of the purposes and characteristics). They were then asked how they felt the PSBs *delivered* these elements. For each individual PSB channel, this question was asked of regular viewers,[9] and for all the PSB channels as a whole, it was asked of regular and occasional viewers.

The analysis of the importance and delivery of PSB purposes and characteristics shows the proportion of UK adults who score each statement 7/8/9/10 out of 10 (described below as 'high') on importance and on delivery, for all the PSB channels as a whole.

Overall, almost eight in ten adults say they are satisfied with PSB

- Despite the growth in choice in recent years, satisfaction with PSB has increased. Overall, 78% of regular or occasional viewers of any PSB channel claimed to be either very, or quite, satisfied with PSB broadcasting, which is significantly higher than in 2015 (73%), but in line with 2014 (80%) and previous years. There were no significant differences by age or socio-economic group.

- Of the 78% who were satisfied with PSB broadcasting, just under a quarter (24%) stated they were very satisfied. This compares to one in four (20%) in 2015 and is a significant increase.

PSB purposes and characteristics are still rated highly on importance and delivery

- Figure 7 shows the findings for each of the PSB purposes, from 2011 to 2016. Audiences' ratings of the importance of the PSB purposes increased significantly, compared to 2015, across all statements except for *'Its programmes help me understand what's going on in the world today'*, *'It shows interesting programmes about history, sciences or the arts'* and *'It shows different parts of the UK, including England, Northern Ireland, Scotland and Wales.'*

[9] 'Regular viewer' is self-defined by the respondent

- As in 2015, the most important purpose was considered to be purpose 1: '*Informing our understanding of the world'* with all three statements scoring higher than those for any other PSB purpose. '*Its news programmes are trustworthy'* (89%) was the highest individual statement for PSB importance among all those who watched at least one PSB channel.

- Favourable audience opinion scores on the delivery of the PSB purposes also increased significantly, except for *'Its programmes help me understand what's going on in the world today'* and *'It shows high quality soaps or dramas made in the UK'.*

- Similar to the ratings for importance, the highest ratings for delivery related to purpose 1. *'Its programmes help me understand what's going on in the world today'* received the highest individual score (77%).

- As in 2015, the lowest level of perceived delivery related to '*it portrays my region/nation fairly to the rest of the UK*'; more than three in five (63%) agreed with this statement.

Figure 7 **Importance and delivery of PSB purposes: 2011-2016**

Purpose	Statement	Metric	2011	2012	2013	2014	2015	2016
Purpose One – Informing our understanding of the world	Its news programmes are trustworthy	*Importance*	81%	84%	88%	86%	86%	89% ↑
		Delivery	62%	64%	66%	67%	70%	75% ↑
	Its programmes help me understand what's going on in the world today	*Importance*	77%	80%	79%	80%	83%	86%
		Delivery	60%	58%	62%	65%	74%	77%
	Its regional news programmes provide a wide range of good quality news about my area	*Importance*	75%	79%	82%	80%	81%	85% ↑
		Delivery	57%	61%	64%	66%	70%	75% ↑
Purpose Two – Stimulating knowledge and learning	It shows interesting programmes about history, sciences or the arts	*Importance*	64%	67%	69%	67%	74%	76%
		Delivery	45%	48%	50%	53%	62%	67% ↑
Purpose Three – Reflecting UK cultural identity	It portrays my region/Scotland/Northern Ireland/Wales fairly to the rest of the UK	*Importance*	62%	67%	69%	67%	79%	83% ↑
		Delivery	41%	40%	44%	46%	56%	63% ↑
	It shows high quality soaps/dramas made in the UK	*Importance*	54%	59%	60%	63%	69%	73% ↑
		Delivery	48%	49%	53%	56%	66%	69%
	It shows high quality comedy made in the UK	*Importance*	*Not asked*			66%	72%	78% ↑
		Delivery				50%	59%	66% ↑
Purpose Four – Representing diversity and alternative viewpoints	Its programmes show different kinds of cultures within the UK	*Importance*	57%	65%	64%	67%	69%	74% ↑
		Delivery	42%	44%	45%	51%	62%	68% ↑
	It shows different parts of the UK including England, NI, Scotland and Wales	*Importance*	*Not asked*			66%	76%	79%
		Delivery				49%	66%	71% ↑

↑ Significantly higher than 2015

Methodological change in 2015

Source: PSB tracker 2016. Summary % of respondents rating importance/ delivery 10/9/8/7. Base for importance: all (in 2016 n=3364); base for delivery: All respondents who watch any PSB channels regularly or occasionally (in 2016 n=3315). Question amended since 2011: previous wording: 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'; 'It portrays my region/Scotland/Northern Ireland/Wales well to the rest of the UK', Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

- Figure 8 shows that there were statistically significant changes in audience views across all PSB characteristics for importance and delivery, except for the importance scores for 'original' and 'innovative', in 2016 compared to 2015.

- Respondents' perception of the importance of the PSB characteristics varied from 68% for 'distinctiveness' to 90% for 'high quality'.
- In terms of the perceived delivery of the PSB characteristics, 'high quality' was rated highly by 80% of respondents, whereas the lowest level of perceived delivery was for 'distinctiveness' (61%). This is unchanged since 2015.

Figure 8 Importance and delivery of PSB characteristics: 2011-2016

Characteristic	Statement	Metric	2011	2012	2013	2014	2015	2016
High Quality	It shows well made high quality programmes	*Importance*	78%	83%	84%	83%	86%	90% ↑
		Delivery	58%	61%	65%	68%	74%	80% ↑
Challenging	It shows programmes that make me stop and think	*Importance*	67%	70%	73%	71%	70%	75% ↑
Original	It shows new programmes made in the UK	*Importance*	67%	69%	73%	75%	80%	83%
		Delivery	46%	47%	52%	54%	65%	73% ↑
Innovative	It shows programmes with new ideas and different approaches	*Importance*	65%	70%	72%	74%	76%	78%
		Delivery	43%	45%	46%	53%	61%	67% ↑
Distinctiveness	The style of programmes is different to what I'd expect to see on other channels	*Importance*	*Not asked*			68%	63%	68% ↑
		Delivery				50%	51%	61% ↑

↑ Significantly higher than 2015

Methodological change in 2015

Source: PSB tracker 2016, UK adults aged 16+. Summary % of respondents rating importance/ delivery 10/9/8/7.; Base for importance: all (in 2016 n=3364); Base for delivery: all respondents who watch any PSB channels regularly or occasionally (in 2016 n=3315). Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Channel performance, by purpose and characteristics

- BBC One's highest delivery score was 88% for *'Shows well-made, high-quality programmes'*. This was followed by *'it helps me understand what's going on in the world'* (85%) and *'its news programmes are trustworthy'* (81%). Its lowest score was for *'The style of the programmes is different to what I'd expect to see on other channels'* (61%). BBC One was rated significantly higher than the PSBs' combined score across eight of 12 purposes and characteristics. This is also the case when comparing against 2015; the largest increases are for the characteristics ratings.
- BBC Two's highest score was for the same statement as BBC One: *'Shows well-made, high-quality programmes'* (88%), followed by *'Interesting programmes about history/science/arts'* (83%). Its lowest score was for '*High quality soaps and dramas'* (49%). In comparison to 2015, nine of the 12 purposes and characteristics scores are significantly higher.
- BBC Three's highest score was 79% for *'Shows well-made, high-quality programmes'*. Its lowest score was for *'Portrays my region/nation fairly to the rest of the UK'* (53%). All these scores have risen since 2015, although not significantly.
- For BBC Four, the highest score was for *'Shows well-made high quality programmes'* (85%) followed by *'Interesting programmes about history/science/arts'* (80%). It scored the lowest for *'High-quality soaps/dramas made in UK'* (39%) and *'High*

quality comedy made in the UK'. In general, the 2016 scores were higher than in 2015, with a few statements that were significantly higher.

- For ITV, *'Shows well-made high quality programmes'* received the highest score (84%), closely followed by '*News programmes are trustworthy'* and *'High-quality soaps/dramas made in UK'* (80% for each). Its lowest score was for *'Interesting programmes about science, history and arts'* (50%). ITV shows significant improvements in delivery since 2015 for purpose 4 and for characteristics.

- Channel 4's highest score was 80% for *'Shows well-made, high quality programmes'* followed by *'Shows programmes with new ideas/different approaches'* (75%). Its lowest score was 44%, for *'Portrays my region/nation fairly to rest of UK'*. There were some significant improvements in delivery across a range of purposes and characteristics.

- Channel 5 received its highest score for *'Well-made high quality programmes'* (72%) and its lowest for *'Portrays my region/ nation fairly to the rest of UK'* (42%). It scored significantly lower for ten of the 12 purposes and characteristics, compared to the PSBs' combined score.

Delivery of nations/ regional news remains consistent

- BBC One's *'Delivery of nations'/regions' news'* remained consistently high across the nations, with nations' ratings ranging from 77% to 86% for delivery of *'a wide range of good quality news about [their] area*'.

- In comparison, the scores for ITV/ STV/ ITV Wales/ UTV ranged from 74% to 87%. Regular viewers in Northern Ireland (87%) and Scotland (86%) were significantly more positive about UTV and STV's delivery of news programmes than were viewers of ITV in England (75%) and Wales (74%).

Children's PSB programming rated highly for importance and delivery

- Nearly nine in ten (89%) parents/carers of children under the age of 15 rated the provision of PSB children's programming as important. This compares to 87% of parents/carers stating the PSB channels deliver on *'providing a wide range of high quality, UK-made programmes for children'*. There were no significant year-on-year changes in the results.

Users of BBC and Channel 4 websites are highly satisfied

- Just over two-thirds (70%) of all respondents felt that it was important that '*the BBC provides a website with high quality content that you can trust'*. More than half (56%) of respondents felt that it was important that Channel 4 did the same.

- More than four in five of respondents were satisfied with the websites (89% for bbc.co.uk and 84% for channel4.com).

- Seventy-seven per cent of all respondents felt it was important that broadcasters provide catch-up services that allow viewers to watch previously broadcast programmes.

- The most frequently viewed PSB catch-up service among respondents was BBC iPlayer, with 50% of using it at least once a month, followed by ITV Hub (39%), All 4 (29%), and My5 (16%).

- For ITV Hub, there was a significant increase in weekly use since 2015 (20% to 24% in 2016).

- Satisfaction among users of each on-demand service followed the pattern of overall use. BBC iPlayer had the highest satisfaction (88% of iPlayer users were satisfied), significantly higher than in 2015 (84%), followed by ITV Hub (79% of ITV Hub users were satisfied in 2016), All 4 (75%), and My5 (62%).

Broadcast TV viewing figures from BARB

Overview

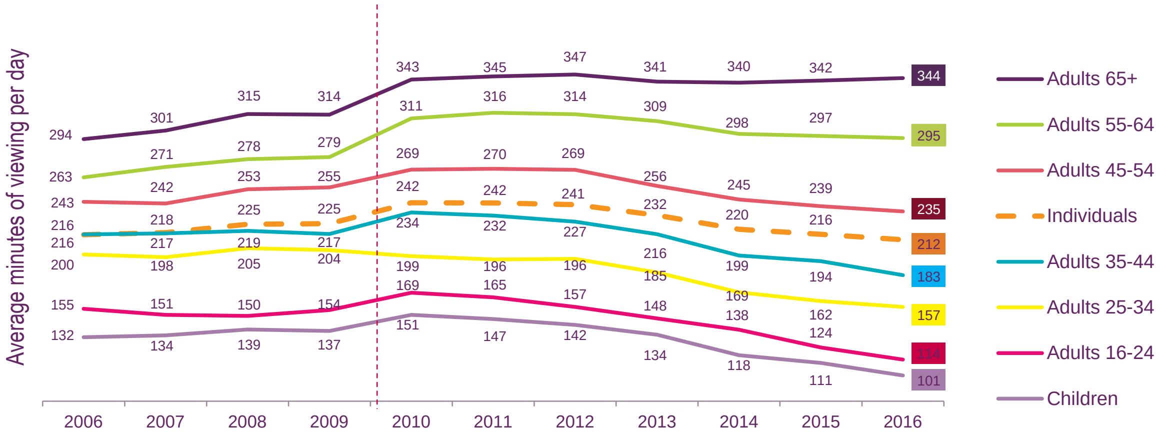
Broadcast TV viewing on TV sets has fallen in the last five years, with a widening gap between the viewing habits of the youngest and oldest audiences

- The reporting span for much of our report is 11 years, and when we compare the amount of time people spend watching TV every day with the 2006 figure, it looks fairly resilient at the all-individuals level, down by just four minutes. But behind the average, the viewing figures have been driven by the oldest age groups, with marked declines in viewing among all other age groups, especially young adults and children.

- On average, individuals in the UK watched 3 hours 32 minutes of measured broadcast TV, on a TV set, on a typical day in 2016. This is four minutes a day (2%) less than in 2015, which continues the pattern of decline since 2011, albeit at a slower rate than previously.

- Viewing has fallen across all age groups since 2011, except for those aged 65+, where it has remained fairly stable. The decline in average daily viewing has been greatest, proportionally, among adults aged 16-24 and children aged 4-15 (down by about a third). In 2016 the year-on-year rate of decline for 16-24s slowed to 8.4%, from 10.5% in 2015, which had been the biggest annual drop for this age group since 2010. However, the proportional decline for children increased in 2016; to 8.8% compared to 5.4% in 2015.

Figure 9 **Average daily minutes of viewing to total broadcast television, by age: 2006-2016**



Source: BARB. All individuals (4+), network, total TV. A new BARB panel was introduced in 2010 therefore pre- and post-panel change must be treated with caution.

- Among all those who have a TV set in the home, proportionally fewer people under 35 than in older groups watch TV in a typical week. Under-25s have also experienced larger falls in average weekly reach since 2010 (around 4-5pp) against a relatively unchanged picture among the 45+ age groups.
- Despite the falls, weekly reach stayed high among all age groups in 2016, ranging from 80% among16-24s to 97% among those aged 65+.
- As a consequence of falls in reach and time spent viewing broadcast TV among younger audiences, and stable reach and viewing minutes among older audiences, the viewer profiles for all TV, and for the main PSBs, have aged.

Figure 10 **Average weekly reach of total broadcast TV, by age group: 2006-2016**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Individuals 4+	92%	93%	92%	93%	93%	94%	94%	93%	92%	92%	91%
Children (4-15)	89%	91%	90%	91%	90%	92%	92%	91%	88%	87%	86%
Adults 16-24	83%	83%	82%	83%	85%	87%	86%	85%	83%	82%	80%
Adults 25-34	92%	92%	91%	92%	91%	93%	93%	92%	90%	89%	89%
Adults 35-44	94%	94%	94%	94%	95%	95%	95%	94%	94%	93%	93%
Adults 45-54	94%	95%	95%	96%	96%	96%	96%	96%	95%	95%	95%
Adults 55-64	95%	96%	96%	96%	96%	97%	97%	97%	96%	96%	96%
Adults 65+	96%	96%	96%	96%	97%	97%	97%	97%	97%	97%	97%

Source: BARB, network. Reach criteria: 15 consecutive minutes, full weeks used. A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

PSB channels

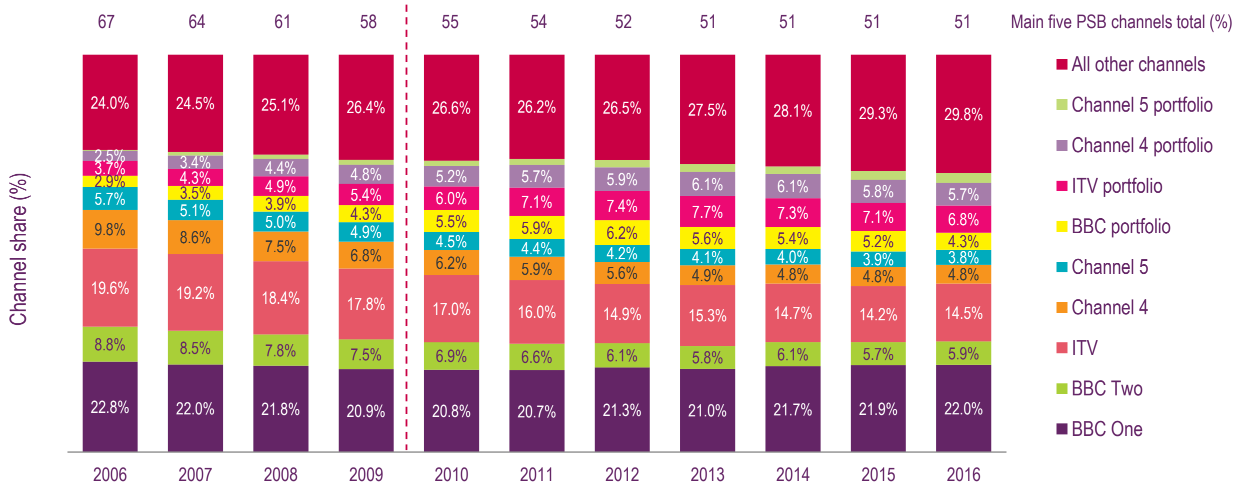
Half of all TV viewing is to the main PSB channels

- Despite operating in a highly competitive market, in 2016, the main five PSB channels still accounted for just over half (51%) of all TV viewing on a TV set, a similar share as in every year since 2012. In 2016, the BBC portfolio channels provided an additional 4% share (2016 all-PSB share = 55%). This is lower than in 2006, when the PSB channels together accounted for 69% of viewing. Following digital switchover, share dropped as more channels became available to watch and all homes had access to a wider range of channels.

- The PSB broadcasters' portfolios of channels have increased their share since 2006, offsetting some of the losses in viewing to the main five PSBs. In 2016 the PSBs combined with their portfolio channels held 70% share of viewing, down from 76% in 2006.

- Year-on-year share remained relatively steady for all five of the main PSBs, but with BBC Three moving online in February 2016, the BBC portfolio of channels decreased its share by almost 1pp.

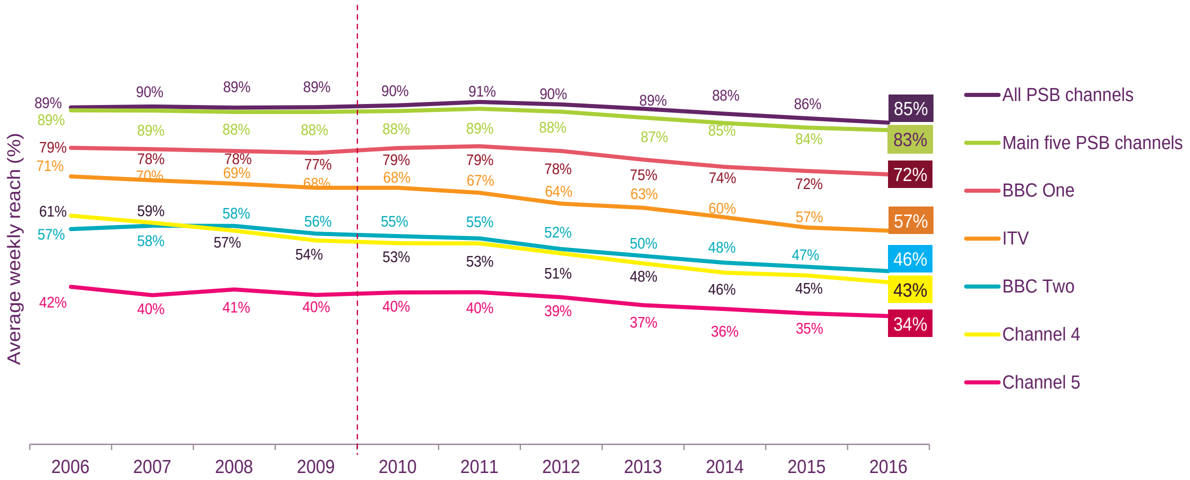
Figure 11 **PSB and portfolio share of TV viewing, all individuals: 2006-2016**



Source: BARB, all individuals (4+), network. A new BARB panel was introduced in 2010; as a result, pre- and post-panel change data must be compared with caution (see dotted line); S4C is included in Channel 4 viewing up to 2009; S4C 2016 channel share = 0.1%.

- Each main PSB channel's weekly reach has declined since 2006, but their combined reach remained high at 83% in 2016; 85% when the BBC portfolio channels are included. However, the reductions to the group of channels over time are significantly higher when compared to the relative stability of reach to all TV.

Figure 12 **Average weekly reach of the PSBs, all individuals: 2006-2016**



Source: BARB. All individuals (4+), network. Reach criteria: 15+ consecutive minutes, full weeks used. A new BARB panel was introduced in 2010 therefore pre- and post-panel change must be treated with some caution. Channel 4 includes S4C up to 2009. S4C average weekly reach 2016 = 0.4%. All PSB channels = main five + BBC portfolio channels

- Daily viewing time to all the PSB channels combined has shown a more defined downward trend, compared to all TV for all age groups.

TV news

Time spent watching TV news remained steady in 2016 but continued to fall among 16-34s

- According to BARB data, viewing of national and international news on broadcast TV remained steady year on year, at 96 hours per individual aged 4+ per year. In 2015 there had been a slight increase following three consecutive years of decline.

- BBC One drew the largest audiences, with 54% of the TV population watching its news programmes in a typical week in 2016, followed by ITV at 30%. The average weekly reach of news has declined for all PSB channels since 2006. The largest fall is for news on ITV (down by 17pp) but this can be partly explained by the change in genre coding for *ITV Breakfast*[10]. News on Channel 5 had the second largest decrease (11ppt) while news on BBC One, and Channel 4's decrease, were similar at around 6-7pp. Of the largest dedicated news channels, reach increased slightly to BBC News (2ppt) and Sky News (1ppt).

[10] The decline in 2015 compared to any year before 2011 may be explained by a change in the genre coding of national/international news on *ITV Breakfast*. From 6 September 2010, following the re-brand of GMTV to the strands of *Daybreak* (0600-0900) and *Lorraine* (0900-0925) there was a change to the genre coding of these two programme segments in BARB; since the re-brand, *Daybreak* has been coded as 'current affairs: magazine' (which is included within the 'current affairs: other' category in Ofcom's analysis) while *Lorraine* was coded as 'entertainment'; before 6 September 2010, distinct programming elements within GMTV as a whole were coded separately. The effect of this is that news and other programming strands which were previously reported separately under GMTV were captured under a single BARB genre category of 'current affairs: magazine' in the third quarter of 2010 and across 2011-2013. Weekly reach to news on ITV fell by 6pp compared to 2011 and by 5pp on BBC One and Channel 5.

- Despite the weekly reach of news falling on BBC One and Two since 2006, they continued to account for the majority share of all news viewing in 2016, rising to 67%. Their share of TV news has increased steadily every year since 2006 (when they held a 55% share). The decline in the share of news viewing held by the BBC News channel continued into 2016, while ITV's share has seen small fluctuations since 2012. The small progressive dips in Channel 5's share of news continued in 2016, while Channel 4's share has remained fairly constant in recent years. The PSB broadcasters accounted for 93% of total viewing of news in 2016, broadly similar to their share a decade ago in 2006 (95%).

- Total viewing hours to broadcast TV news fell to 30.7 hours per person among 16-34s in 2016, from 32.4 hours in 2015. This continued the steady downward trend in viewing to news for this age group. However, of these 30.7 hours, the PSB broadcasters slightly increased their share of news viewing (up by 1.3pp to 93.4% in 2016). This was at the expense of Sky News' share of news viewing, which decreased by 1.3pp.

- Viewing of news among adults aged 35 and above is a lot higher than among younger adults; it remained fairly steady year on year, decreasing by less than an hour to 142 hours per person in 2016, after a three-hour increase between 2014 and 2015. Of the 142 hours of news viewing by those aged 35+, the PSB broadcasters largely retained their share (92.9% in 2016, from 93.3% in 2015).

- Since 2014, time spent viewing nations' and regions' news across the UK has remained fairly constant (at 23.3 hours per person in 2016). The slight decline, from 23.8 hours in 2015, came from BBC One, while viewing hours stayed the same on ITV. As a share of total TV viewing in their respective weekday time slots, the share of nations' and regions' news provided by Channel 3 increased in Northern Ireland, Wales and Scotland, while the share of BBC One's nations' and regions' news increased slightly in Scotland and Northern Ireland but fell in Wales.

Children's programming

The PSB channels and their portfolios continue to account for more than half of children's viewing time to broadcast TV on TV sets

- Children's viewing of broadcast television on TV sets continues to decline; it fell by ten minutes per day, year on year, to 1 hour 41 minutes in 2016. Between 2015 and 2016, viewing to the PSBs and their respective portfolios declined to a lesser extent than all other channels, and accounted for around 55% of children's viewing.

- The trends in children's share of viewing by channel/group have been steady in recent years, with the main five PSB channels representing around 30% of viewing. Between 2015 and 2016, while remaining the most popular PSB channel group, the share represented by the BBC portfolio channels fell from 11.8% to 11.0%.

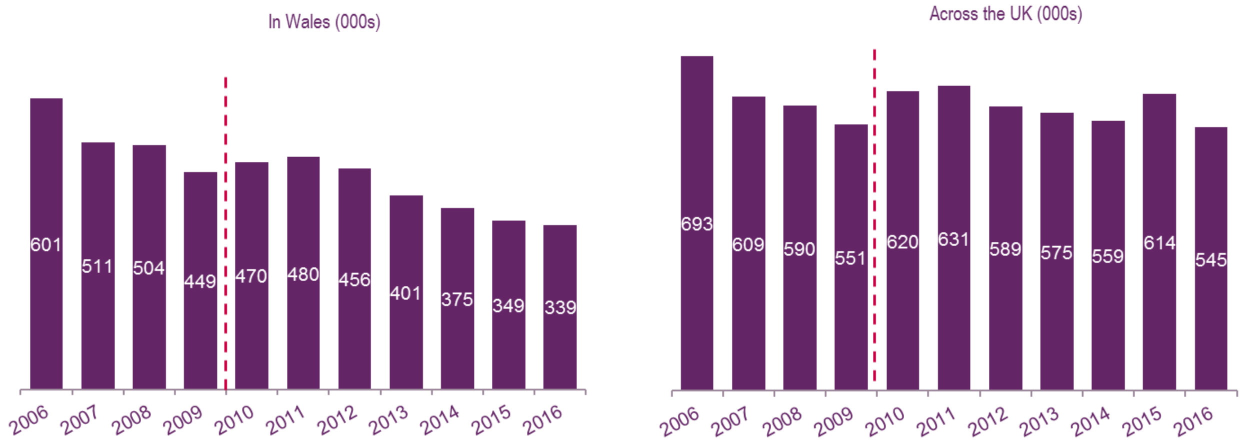
- CBeebies continues to be the most popular channel choice for children when they are watching children's programming. Between 2015 and 2016 the share of viewing to the children's genre represented by the Disney channels fell from 17.6% to 13.2%, the fourth successive period of decline for the group. Over the same period, the share of viewing to the CSC Media Group, Viacom and the PSB portfolio children's channels increased.

- Across all channels, pre-school and cartoons/animation programming dominate children's viewing of the children's genre, representing three-fifths of viewing.

S4C

- In a typical week in 2016, 339,000 viewers in the S4C region watched S4C on television for at least three consecutive minutes. This continues a steady decline in weekly reach since 2011. The figure goes up when all viewers across the UK are taken into account: weekly reach was 545,000 viewers in 2016, a decrease since 2015 when audience figures peaked. As S4C is a niche channel, its viewing hours often fall outside the industry standard seven-day time-shifted window on TV. When we include figures for viewing on the TV set between eight and 28 days after transmission, S4C's 2016 reach increased to 345,000 in Wales and 602,000 across the UK.

Figure 13 **Average weekly reach of S4C in Wales and the UK: 2006-2016**



Source: S4C/BARB, individuals (4+). S4C-total area and S4C network. Reach criteria: 3+ consecutive minutes, full weeks used. A new BARB panel was introduced in 2010 therefore pre- and post-panel change must be treated with caution. Before March 31st 2010 data is based on S4C Welsh hours, so as not to include any viewing to Channel 4. Post March 31st 2010 data is based on all S4C hours. Historical figures may differ slightly from previous reports due to S4C changing data providers.

- Time spent watching S4C on the channel remained stable year on year in Wales, at almost 13 hours a year, following four years of decline.

- In Wales, the spread of viewing by genre on S4C has remained broadly consistent year on year, with shifts in some genres since 2011. Sport still accounted for the largest proportion of viewing, at 21%, and the proportion of viewing of soaps in 2016 increased slightly on the year, bringing it closer to its pre-2015 level. The proportion of children's viewing decreased slightly year on year and is now 1pp above its 2011 level.

Output and spend

PSB output and spend in context

The changing nature of PSB output

Spend by the PSB channels on first-run UK originations increased in real terms between 2013 and 2016, following years of decline since the peak spending year of 2004. The real-terms decline from 2004 to 2013 must be seen in the context of wider changes in the TV industry over this period, particularly the costs associated with the production of new programmes. This was analysed in Ofcom's third PSB Review[11] and includes:

- **Genre mix and volume.** Over this period there was a shift in genre output across the PSB channels. Hours of big-budget dramas decreased, as did original productions broadcast during the day, allowing budgets to be spent on more, relatively lower-cost programmes with broad audience appeal.

- **Input costs.** The input costs associated with making programmes appeared to increase more slowly than CPI inflation between 2007 and 2013. This was particularly true for equipment, studio hire, and production staff. As a result, the real-terms decline, based on CPI, may have overstated the actual decline in programme investment over this period. However, it is possible that input costs may, since then, have started to rise at a faster rate, due to the greater demand for studio space and drama production staff associated with increased production activity since the introduction of tax reliefs for high-end television programmes in April 2013.

- **Efficiency gains.** Smaller crews and fewer filming days have been used in recent years wherever possible, to reduce costs without affecting quality. Post-production processes have also benefited from technological gains, with digitisation significantly reducing costs.

- **Third-party finance.** Third-party financing[12] of PSB programmes has allowed broadcasters to reduce the overall proportion of a programme's budget that they fund directly. In some cases, this means that broadcasters have been able to reduce the amount they spend, without sacrificing quality.

The role of major sporting events on original UK content spend

Spend on first-run UK-originated programming is also influenced by cyclical sporting events, with spend on sport notably higher in even-numbered years. There was a 17% real-terms annual increase in spend on original sports content in 2016, totalling £515m, with coverage of the Rio Olympics, Paralympics and European football championships in France contributing to this rise.

[11] See O&O report: *The evolution of the TV content production sector* and Mediatique's report *Investment in TV genres,* available at https://www.ofcom.org.uk/consultations-and-statements/category-1/psb-review-3.

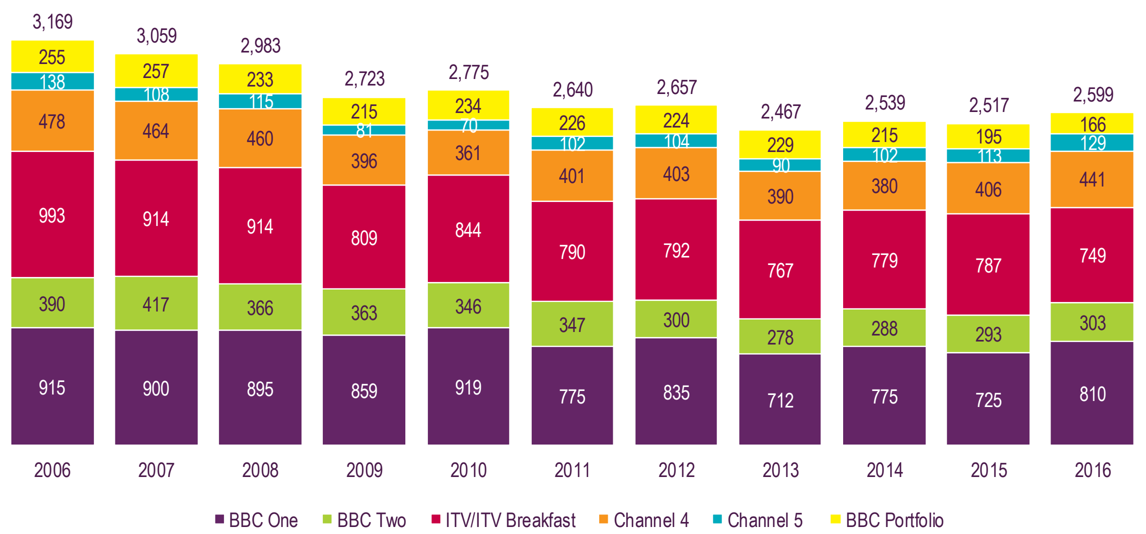
[12] See PACT *Independent Production Sector Financial Census and Survey 2015,* page 24, for the estimated financial contribution to commissions across the UK TV sector.

PSB channels

PSB channels' spend on new UK network programmes reached £2.60bn in 2016

- The PSB channels spent a total of £2.60bn on first-run UK-originated content in 2016. The commercial PSB channels (ITV/ITV Breakfast, Channel 4 and Channel 5) contributed £1.32bn of this, while the BBC contributed £1.28bn.
- In 2006, spend on first-run UK originations stood at £3.17bn among the PSB channels. The 2016 figure of £2.60bn was an 18% decrease in real terms on 2006, with each of the main five PSB channels reducing their spend over the intervening period.
- However, 2016 spend levels represented a 2% increase in real terms on 2014 – the most recent comparable year due to the impact of major sporting events – and was a 3% increase on 2015.
- Both BBC One (12%) and BBC Two (4%) increased their spend on first-run UK originations in 2016, while the closure of BBC Three as a PSB television channel in February 2016 contributed to the BBC's portfolio spend decreasing by 14% to £166m.
- Channel 5 increased its real-terms spend by 15% on first-run UK originations in 2016, as its content strategy moved away from acquisitions and towards commissioning.
- Channel 4 spent £441m on new UK commissions in 2016, its highest real-terms spend since 2008.
- ITV/ITV Breakfast was the only main PSB channel to reduce its spend between 2014 and 2016, down by 4% in real terms to £749m.

Figure 14 PSB network spend on first-run UK originations, by channel (£m)

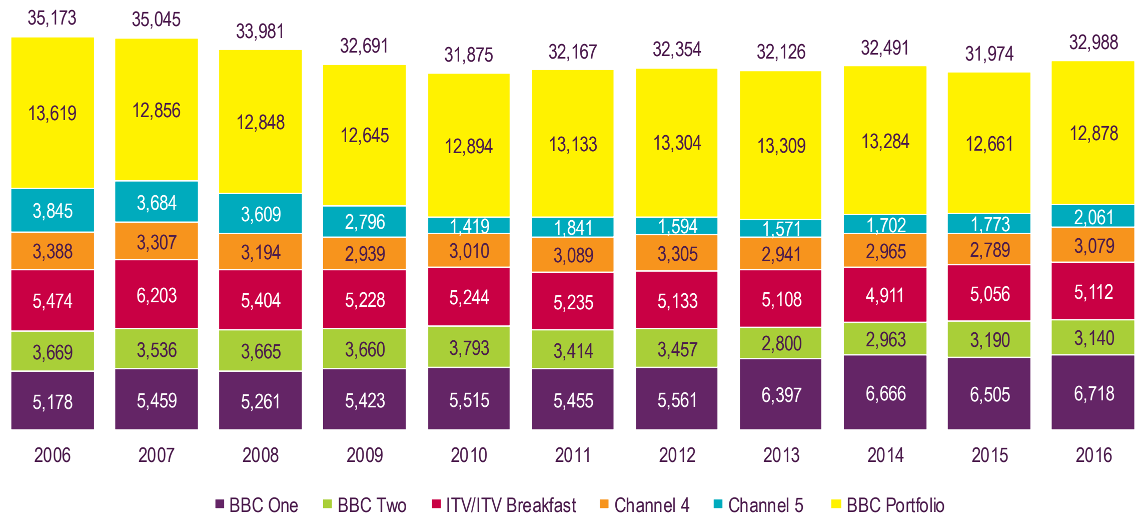


Source: Ofcom/broadcasters Note: figures are expressed in 2016 prices. BBC portfolio figures include BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. Figures do not include S4C, BBC Alba or BBC HD and nations'/regions' programming.

In 2016, the PSB channels broadcast the greatest number of first-run UK-originated hours since 2008

- At 32,988 hours, the PSB channels broadcast more hours of first-run UK originations in 2016 than in any year since 2008. Each of the main five PSB channels increased its hours, with the exception of BBC Two, which was down by 2% since 2015.

Figure 15 **PSB first-run UK-originated network hours, by channel (hours)**



Source: Ofcom/ broadcasters Note: BBC portfolio figures include BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. Figures do not include S4C, BBC Alba or BBC HD and nations'/regions' programming.

- First-run UK originations accounted for 45% of all hours broadcast across the PSB channels in 2016 – an increase from the 43% seen in the previous three years.

Genre analysis

Spend on new UK factual programming across the PSB channels increased by 6% in real terms to £559m in 2016, the highest spend across all genres

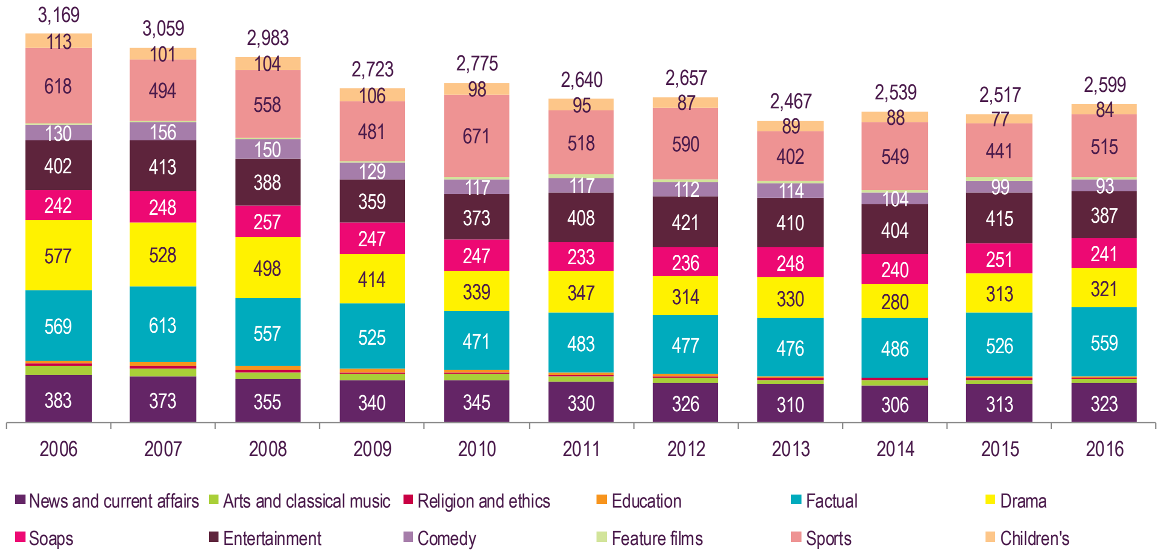
- Factual (£559m) and sport (£515m) saw the greatest amount of spend on first-run UK originations in 2016, across the PSB channels, with annual increases of 6% and 17% respectively.

- After sport, spend on first-run UK originated children's content increased most between 2015 and 2016; by 9% in real terms to £84m. However, it was still 26% lower in real terms than in 2006.

- In 2016 spend on original UK comedy output across the PSB channels continued to decrease, down by 7% to £93m in real terms, the lowest level since 2006, when we started collecting data.

- There were increases since 2015 in real-terms spend, both on new UK news and current affairs (up 3% to £323m) and drama (up 3% to £321m).

Figure 16 **PSB first-run UK-originated programme spend, by genre (£m)**



Source: Ofcom/broadcasters. Note: figures are expressed in 2016 prices. Figures include PSB services: BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, BBC Parliament, ITV, ITV Breakfast, Channel 4 and Channel 5. The analysis does not include S4C, BBC Alba or BBC HD. Figures exclude nations'/regions' programming.

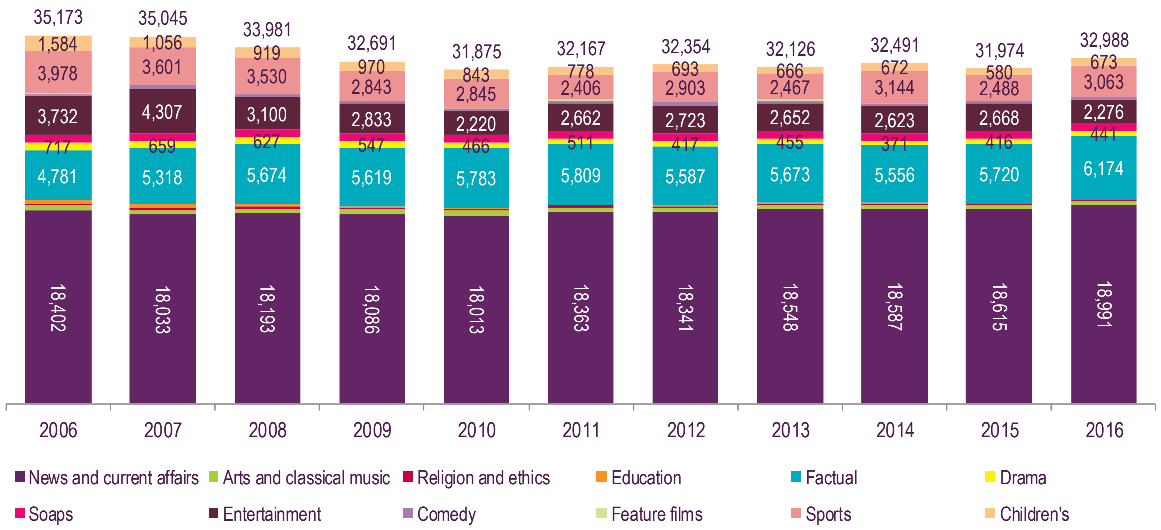
- In the year of the referendum on the UK's membership of the EU, 18,991 hours of original news and current affairs programming were broadcast across the PSB channels, a 2% increase on 2015 levels.

- In 2016, 673 hours of first-run UK originated children's content were broadcast on the PSB channels; this was the highest level since 2012 and a 16% increase on 2015.

- Hours of new UK drama across the PSB channels increased for the second consecutive year in 2016, by 6% to 441 hours.

- There was a decline of 392 hours (15%) in first-run UK-originated entertainment programming in 2016, and a 454-hour increase (8%) in original UK factual output over the same period.

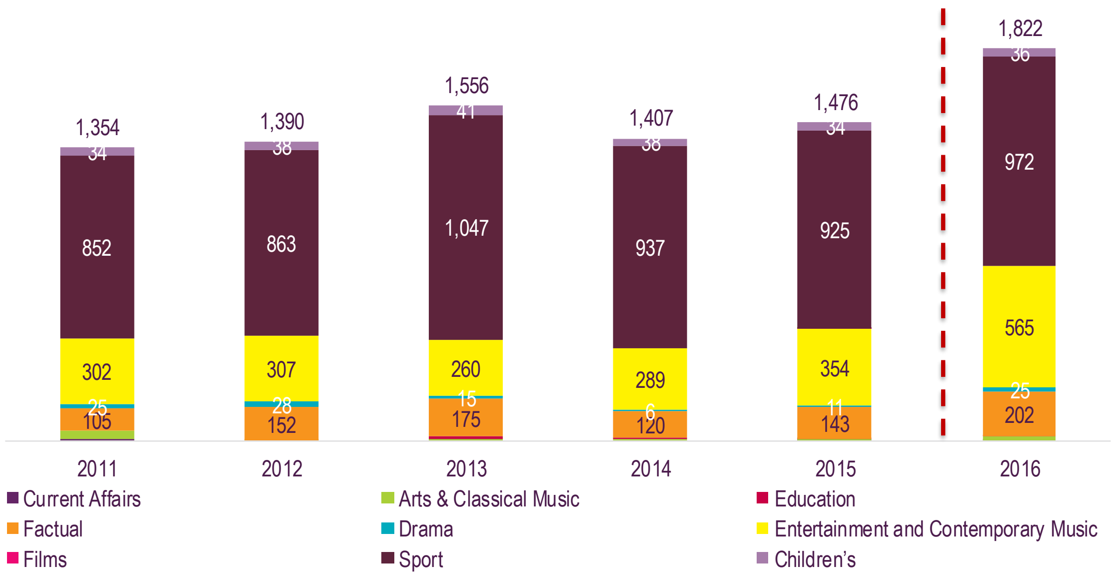
Figure 17 **PSB first-run UK originated hours, by genre (hours)**



Source: Ofcom/broadcasters. Note: Figures include PSB services: BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, BBC Parliament, ITV, ITV Breakfast, Channel 4 and Channel 5. The analysis does not include S4C, BBC Alba or BBC HD. Figures exclude nations'/regions' programming.

- The commercial PSB portfolio channels and the BBC's online services make a valuable contribution to PSB programming, on top of that provided through the PSB channels. In 2016, they provided 1,822 hours of first-run UK originated content, with additional content spend of £138m.

Figure 18 **Commercial PSB portfolio and BBC online services' first-run UK originated hours, by genre**



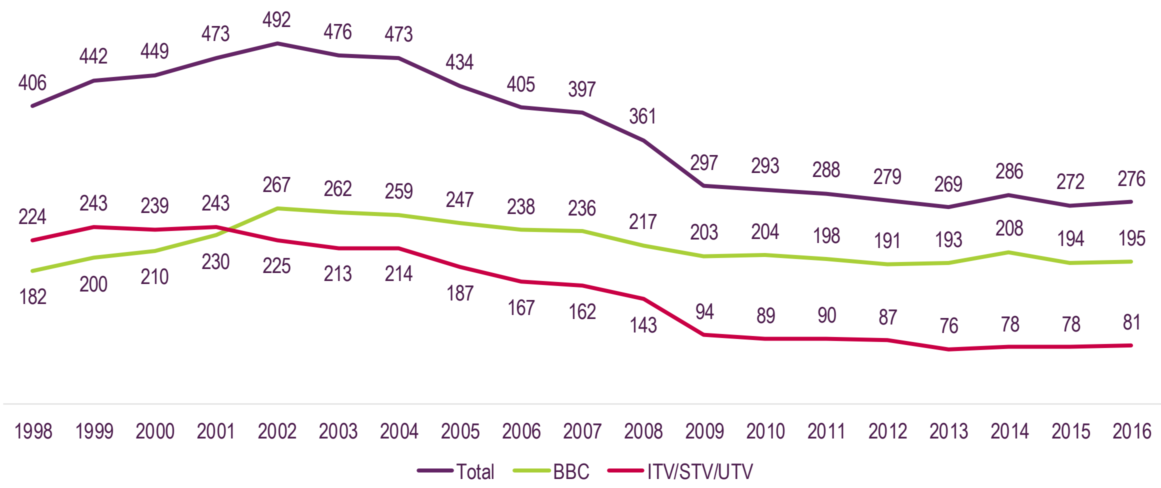
Source: Ofcom/broadcasters. Note: The commercial PSB portfolio channels are CITV, ITV2, ITV3, ITV4, ITVBe, ITV Encore, 4Seven, E4, Film4, More4, 5USA, 5 and Spike. From 2016 onwards, figures include BBC content only available online. Output hours are based on running times.*

Nations' and regions' programming[13]

Spend on first-run UK originations for viewers in the nations and regions increased by 2% in real terms in 2016.

- In a year of devolved parliamentary and assembly elections, spend on new, non-network originations for viewers in the nations and regions reached £276m in 2016, a 2% increase in real terms since 2015.
- BBC spend on such programming stood at £195m in 2016, a 1% annual increase in real terms.
- ITV, STV and UTV (the holders of the Channel 3 licences across the UK in 2016) spent £81m on new UK programming for the nations and regions in 2016. This was a 4% increase in real terms on 2015 and the highest level of investment since 2012.[14]
- BBC Alba spent £16m on original Gaelic programming in 2016, a 19% increase in real terms on 2015 levels. More hours of new content were produced by independent production companies in 2016, including two series of the drama *Bannan.*
- S4C spent £62m on first-run Welsh-language programming in financial year 2016/17, a slight decrease in real terms on £64m the previous year.[15]

Figure 19 **PSB first-run UK originations spend on nations'/regions' output (£m)**



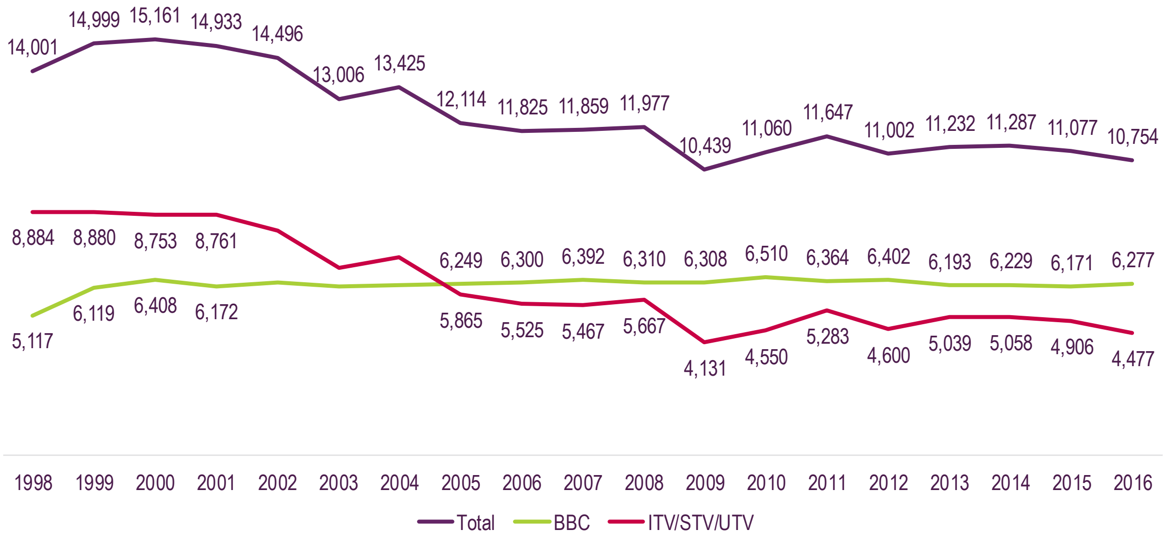
Source: Ofcom/broadcasters Note: figures are expressed in 2016 prices. Figures exclude BBC Alba and S4C

- There were 10,754 hours of original non-network nations' and regions' programming broadcast in 2016; a 3% decrease year on year. While BBC output increased by 2%, output across ITV and STV decreased by 9% compared to 2015. This was mainly due to the STV production *Nightshift* ending in late 2015.

[13] Our PSB compliance pack contains the proportion of network content produced out of London.
[14] This increase can partly be explained by ITV's takeover of UTV in 2016, with ITV allocating additional costs to UTV programming, in line with the rest of the ITV regional licences.
[15] The BBC has a statutory obligation to provide additional content for S4C, the value of which is agreed at £19m per annum.

- BBC Alba broadcast 706 hours of original Gaelic-language programming in 2016, a 32-hour increase on 2015, while S4C broadcast 1,753 hours of original Welsh-language programming made by independent production companies in financial year 2016/17.

Figure 20 **PSB first-run UK originated hours of nations' and regions' output**



Source: Ofcom/broadcasters Note: Figures exclude BBC Alba and S4C.

Glossary of terms

Viewing

Main five PSB channels BBC One, BBC Two, the Channel 3 Services (ITV/STV/UTV), Channel 4 and Channel 5, including their HD variants but excluding their +1s.

PSB portfolio channels all UK channels from the PSBs, apart from their main channels. These are referred to as a total group in the analysis, or by broadcaster group (e.g. ‘BBC portfolio’). The main PSB +1 channels are included in this group.

PSB families the main five PSB channels and their portfolio channels combined. Further details of individual channels included in the PSB groups can be found in the *TV Viewing* annex and the *Background and Methodology* document.

Average daily hours Average hours of viewing per person, per day.

Average weekly reach The proportion of the TV population who watch a channel or group of channels at least once in an average week (for at least 15 consecutive minutes or three consecutive minutes for the news genre and S4C).

Share The percentage of the total TV audience watching a specific channel or group of channels, expressed as an average over a given period of time. For example, a 65% share for a channel means that of all the viewers watching television at the time, 65% were watching the given channel (and the remaining 35% were watching other channels).

Output and spend

Main five PSB channels BBC One, BBC Two, the Channel 3 Services (ITV/STV/UTV), Channel 4 and Channel 5.

BBC portfolio channels BBC Three (until 15 February 2016), BBC Four, BBC News, BBC Parliament, CBBC and CBeebies.

BBC online services BBC iPlayer (and BBC Three from 15 February 2016, when it became an internet-only brand).

Commercial PSB portfolio channels ITV2, ITV3, ITV4, ITVBe, ITV Encore, CITV, E4, More4, Film4, 4Seven, 5*, 5USA and Spike.

Daytime 6.00am – 6.00pm

First-run UK originations Programmes commissioned by or for a licensed public service channel with a view to their first showing on television in the United Kingdom in the reference year.

Network/ non-network programming Network programming is shown by the PSB channels across the UK, whereas non-network programming is nations’ and regions’ programming that is shown only in specific areas of the UK.

New UK programmes Alternative term for first-run UK originations.

Peak time 6.00pm -10.30pm. For BBC Three and BBC Four, peak time runs from 7.00pm to 10.30pm.