CMR 2015 TV and AV Slides

Figure 2.1

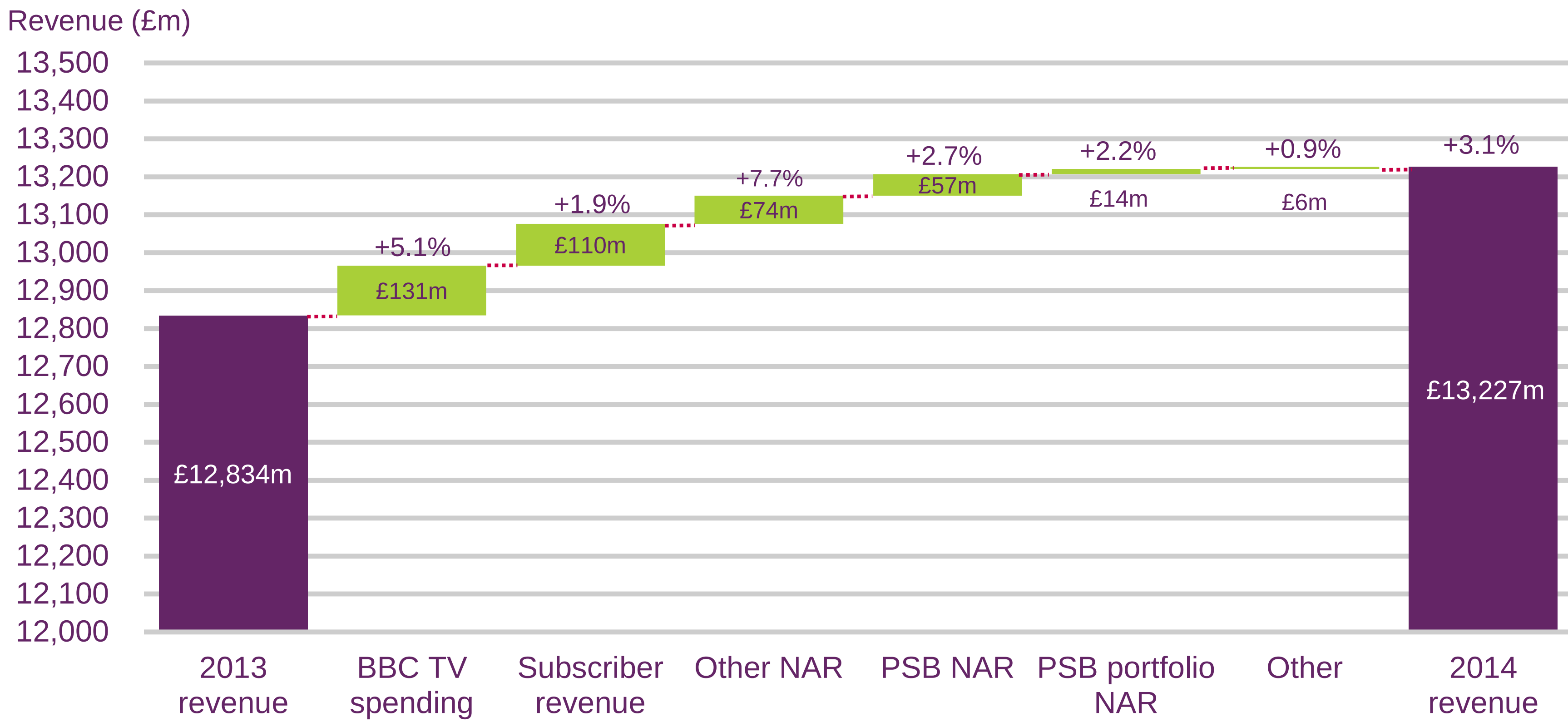
Industry metrics

UK television industry	2009	2010	2011	2012	2013	2014
Total TV industry revenue (£bn)	11.1	11.8	12.4	12.5	12.8	13.2
Proportion of revenue generated by public funds	23%	22%	21%	21%	20%	21%
Proportion of revenue generated by advertising	28%	30%	29%	28%	29%	29%
Proportion of revenue generated by subscriptions	42%	43%	44%	44%	46%	45%
Broadcaster share of total display advertising spend	41%	42%	43%	43%	43%	44%
Spend on originated output by 5 main networks (£bn)	2.4	2.5	2.5	2.6	2.5	2.6
Digital TV take-up (% all households)	88%	92%	94%	96%	95%	93%
Proportion of DTV homes with pay satellite or cable	53%	56%	51%	51%	52%	51%
Minutes spent watching TV per day (per person aged 4+)	225	242	242	241	232	220
Share of the main five channels in all homes	58%	56%	54%	52%	51%	51%
Number of channels broadcasting in the UK	490	510	515	529	527	536

Source: Ofcom/broadcasters/Advertising Association/Warc/BARB/GfK. Note: Expressed in nominal terms. Public funds include DCMS grant to S4C, as well as BBC funding that is allocated to TV (including the proportion of licence fee revenue 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 is net of discounts, and includes 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).TV viewing based on BARB analysis of viewing to scheduled TV programmes such as those listed in TV listings magazines or on electronic programme guides (EPG) on TV sets.

Figure 2.2

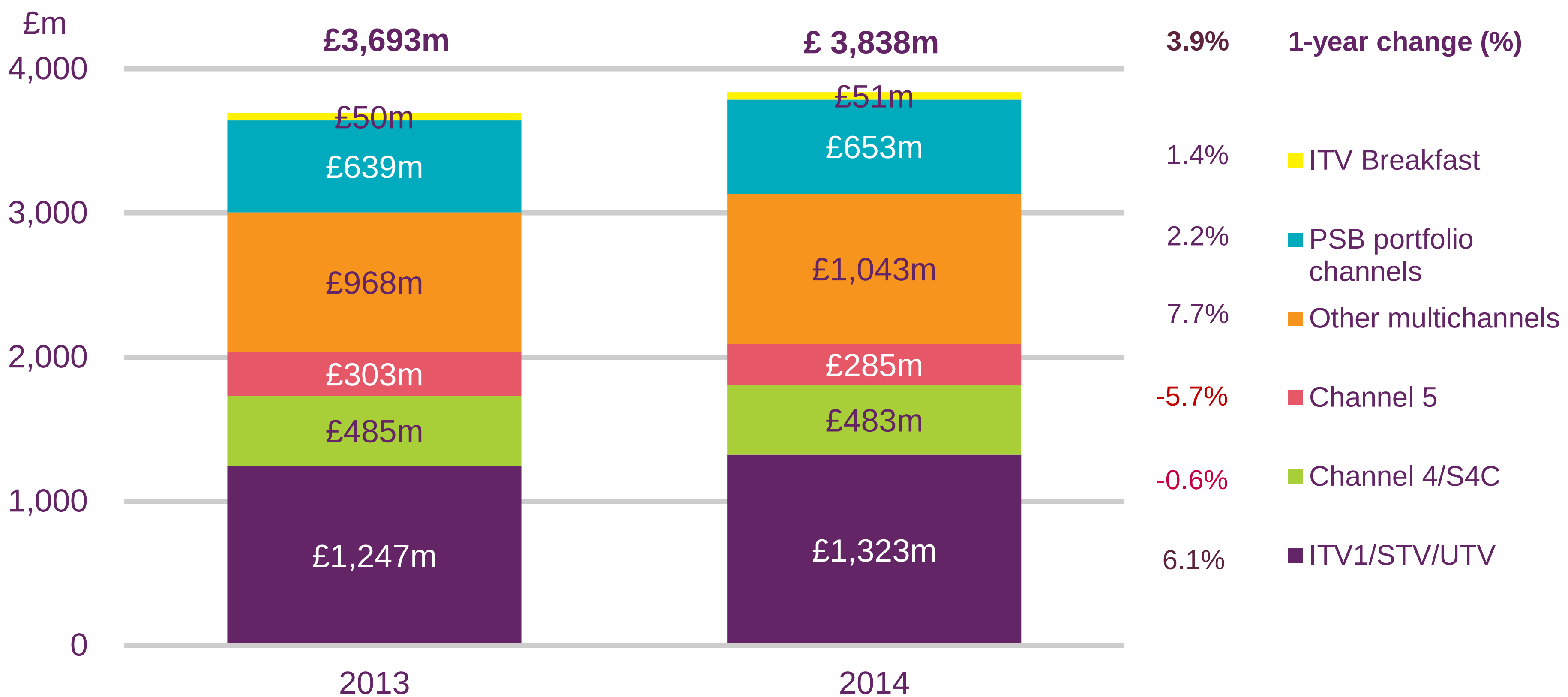
Total TV industry revenue, by source: 2014



Source: Ofcom/broadcasters. Note: Figures expressed in nominal terms. PSB NAR comprises Channel 3 licensees (including ITV Breakfast, ITV plc, Channel Television, STV and UTV), Channel 4, Channel 5 and S4C. PSB portfolio NAR includes commercial channels owned by the PSBs (ITV2, ITV3, ITV4, E4, More 4, Film 4, 5* and 5USA. 'Other NAR' comprises the rest of the multichannel market. Platform operator revenues do not include installation costs, equipment sales or subsidies. BBC TV spending represents the amount of BBC revenue that is allocated to TV, which is estimated by Ofcom based on the BBC's Annual Report and Accounts 2014/15. Excludes revenue generated via online TV, as outlined in Figure 2.4

Figure 2.3

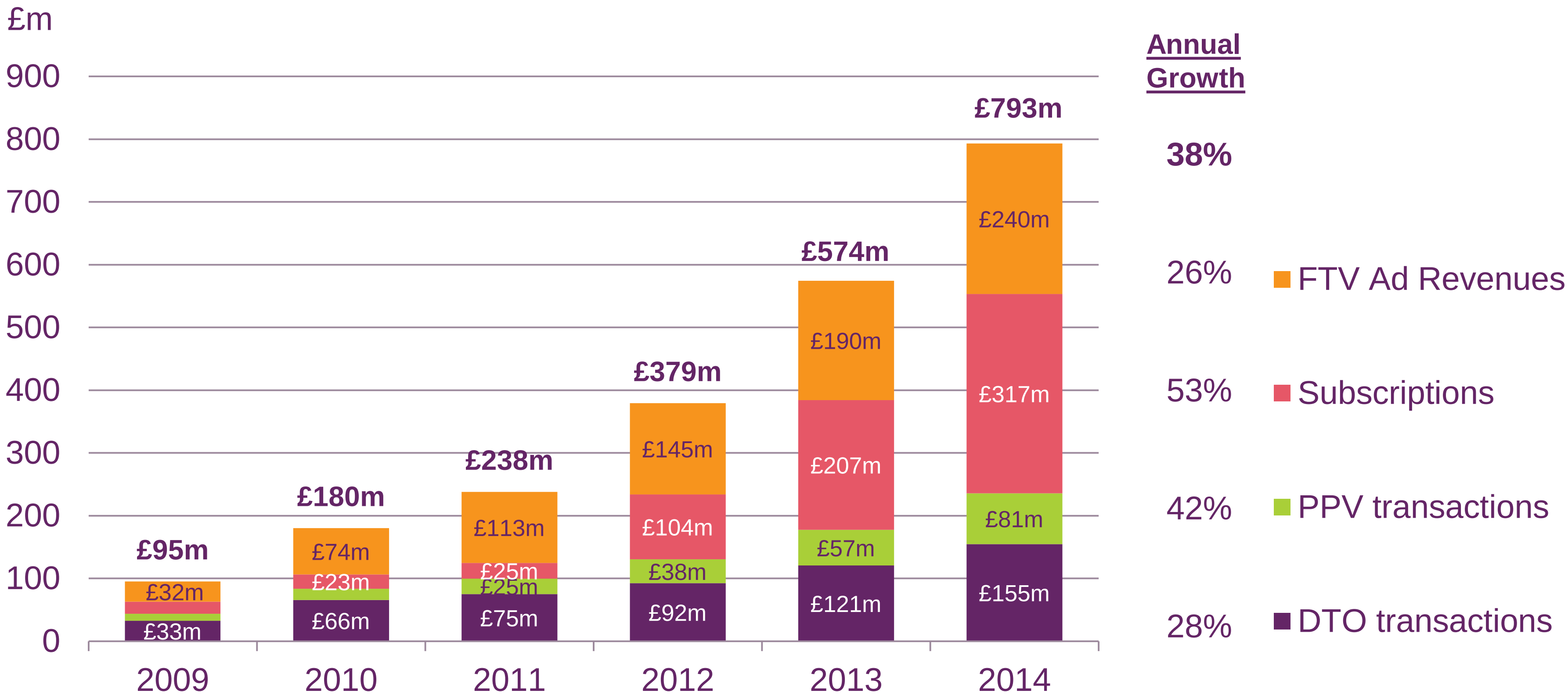
Advertising revenue, by share: 2013 - 2014



Source: Ofcom/broadcasters. Note: TV advertising includes revenues that broadcasters receive from the sale of advertisements on screen (net of agency fees) and excludes video on demand. Totals may not equal the sum of the components due to rounding. ITV1/Channel 3 includes ITV Plc, STV, UTV and Channel Television.

Figure 2.4

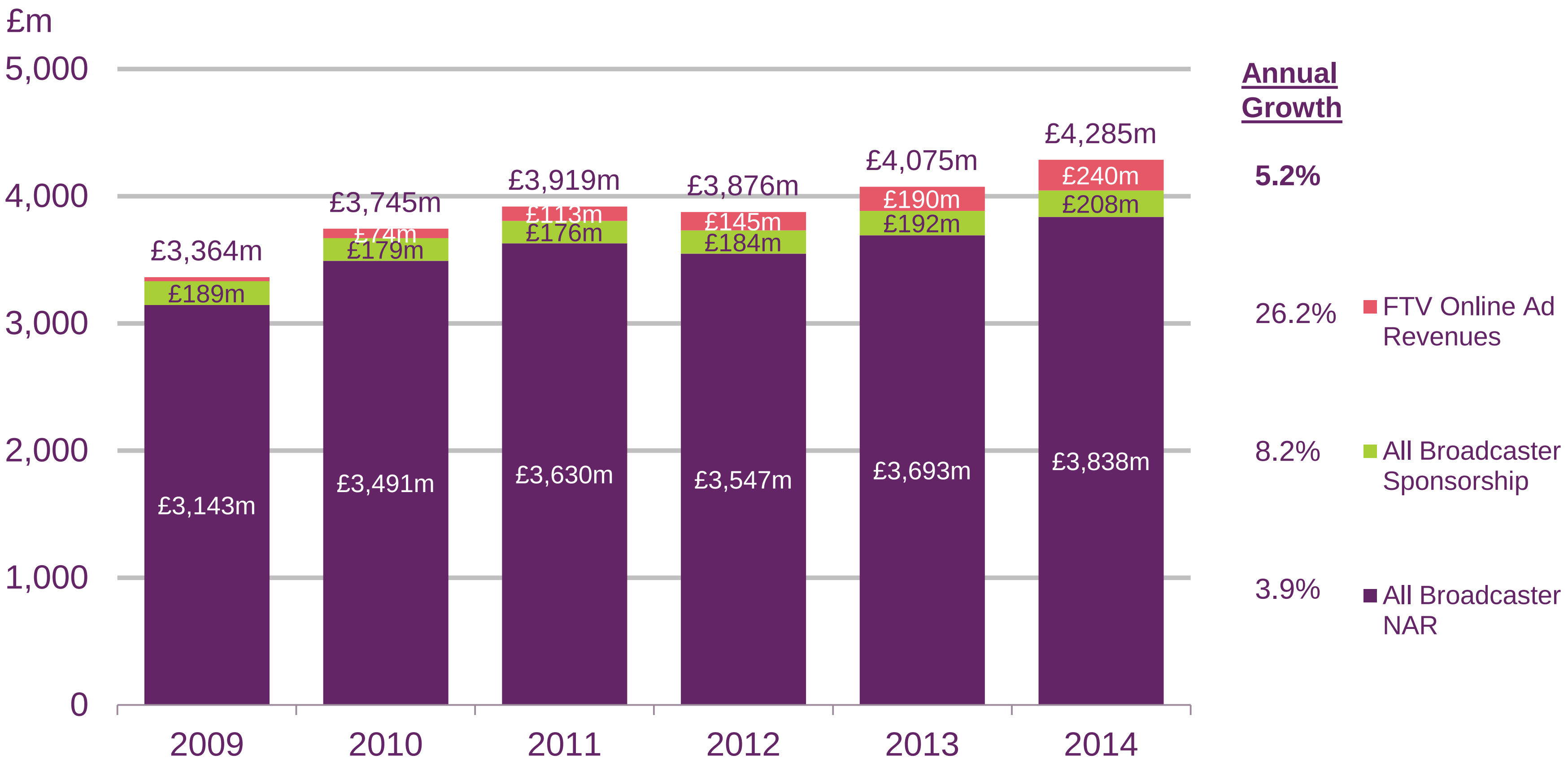
Online TV revenues



Source: IHS Screen Digest. 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. All figures are nominal. Includes only revenue from long form video content and excludes revenues generated from online usergenerated content.

Figure 2.5

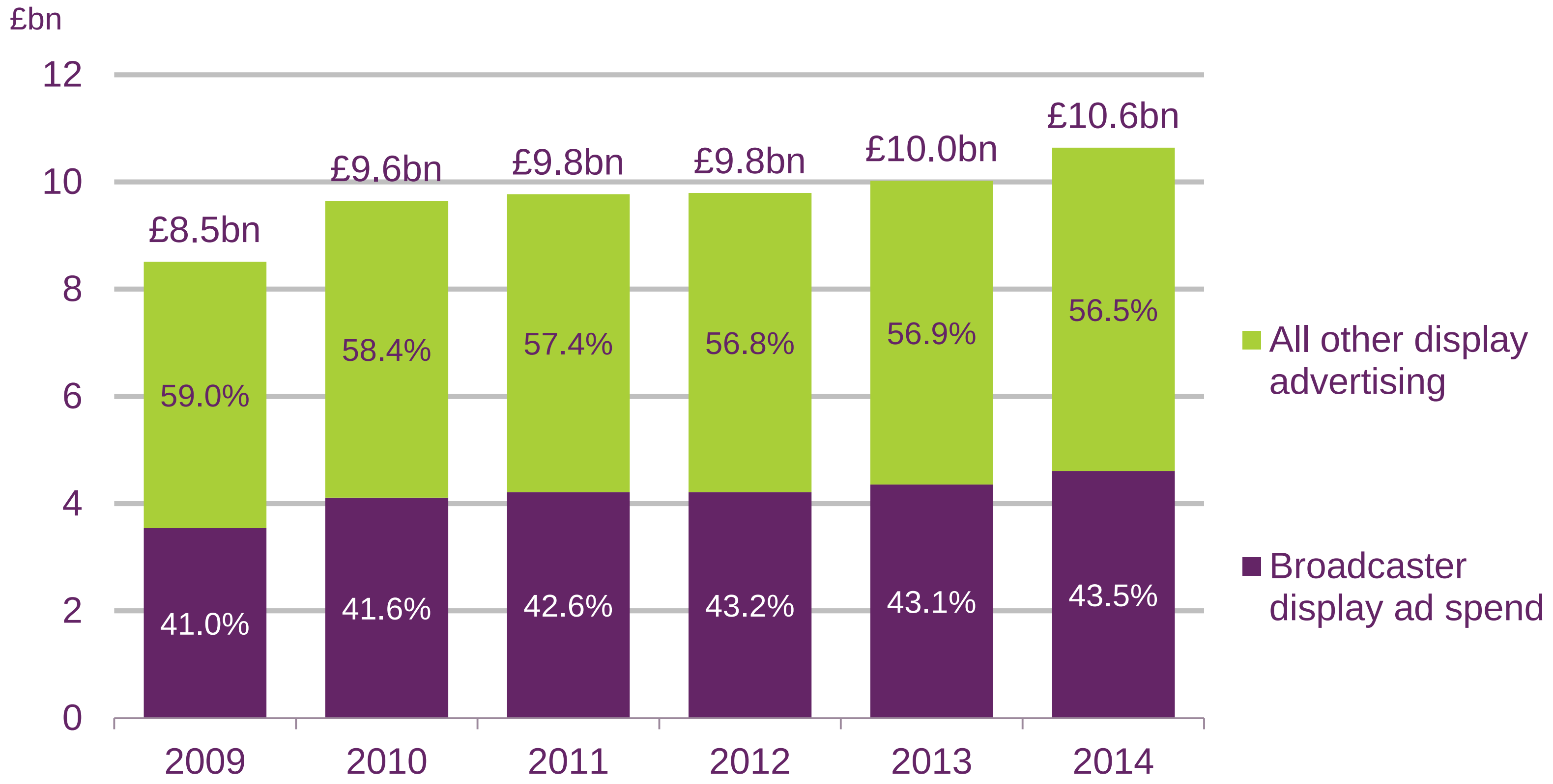
Total cross-platform advertising and sponsorship revenue



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

Figure 2.6

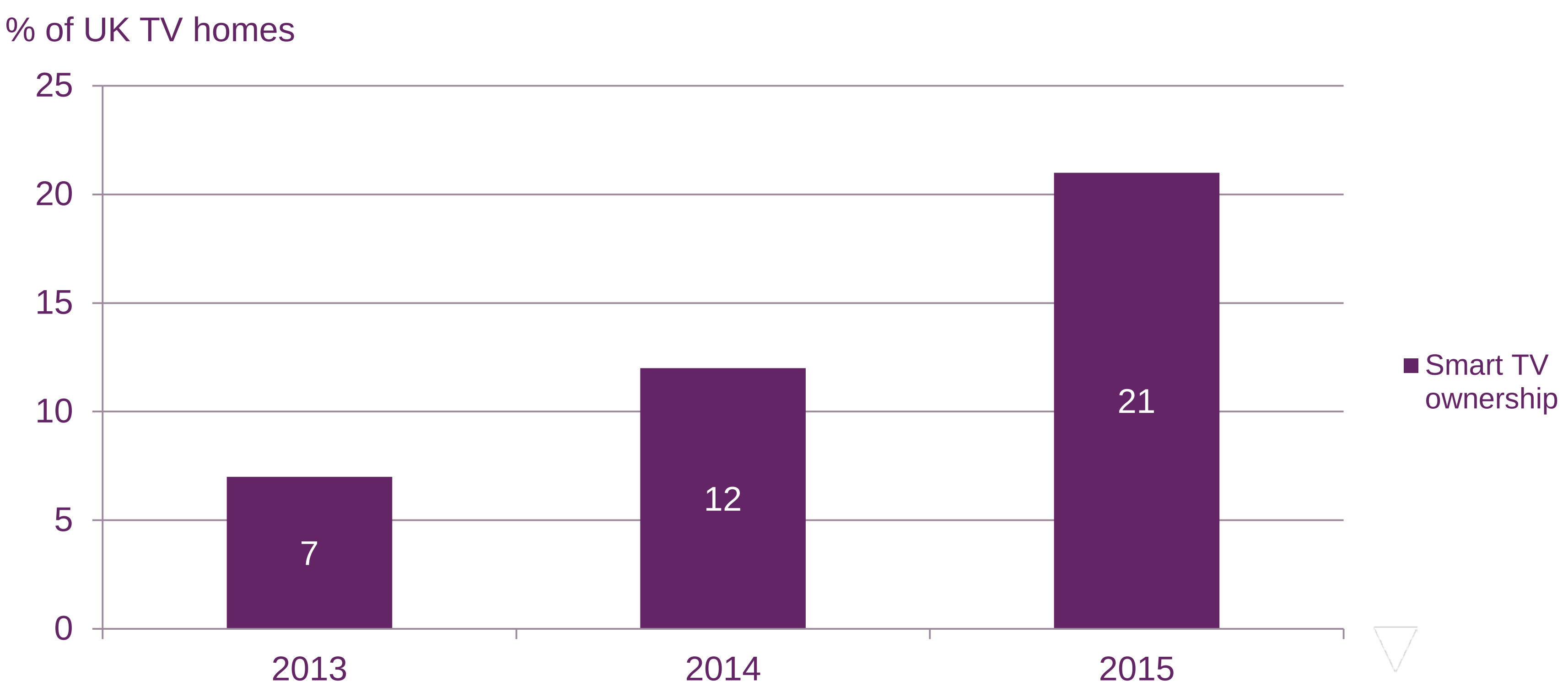
Broadcaster percentage share of all display advertising expenditure



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 nominal.

Figure 2.7

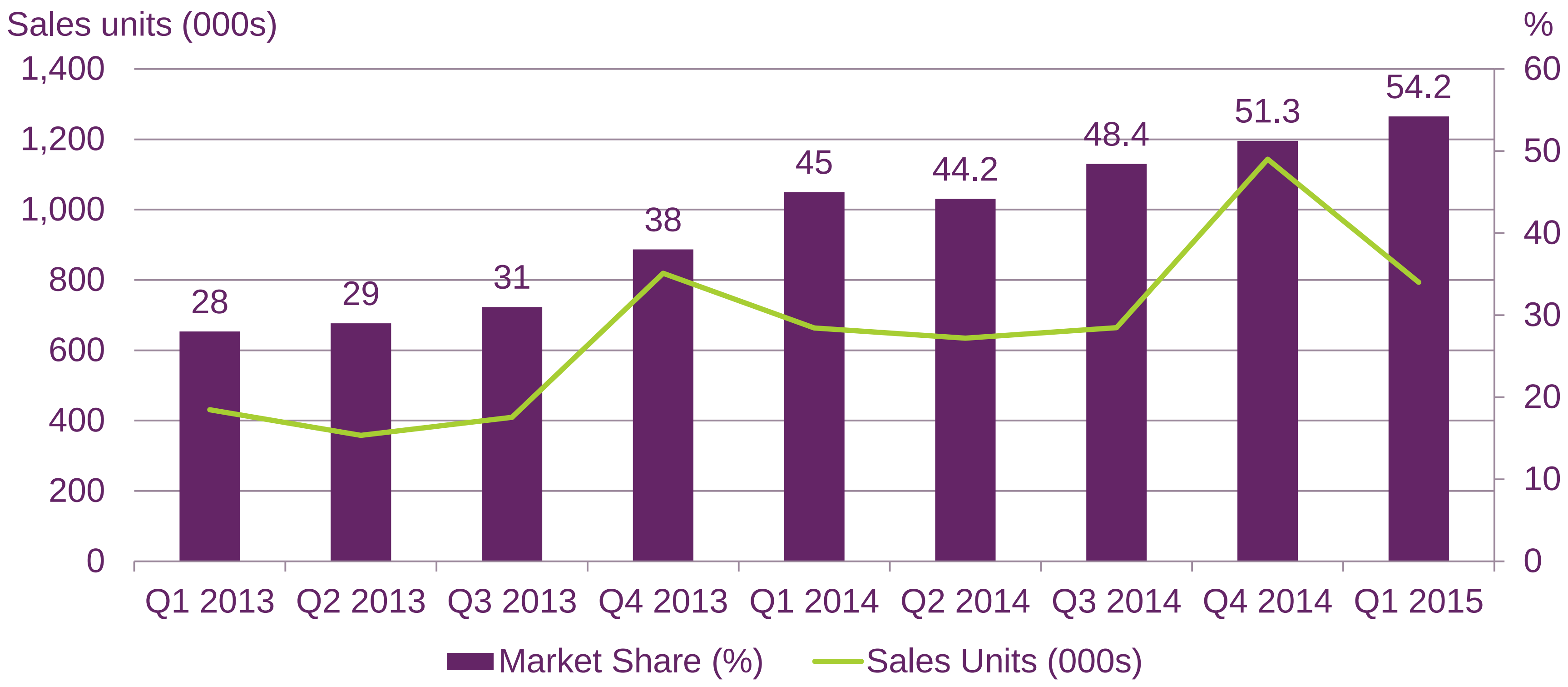
Take-up of smart TVs among UK TV households



Source: Ofcom Technology Tracker, W1 2015. Base: All adults aged 16+ with a TV in the household (n = 3616).
QH15(QH62): Are any of your TV sets ‘smart TVs'?

Figure 2.8

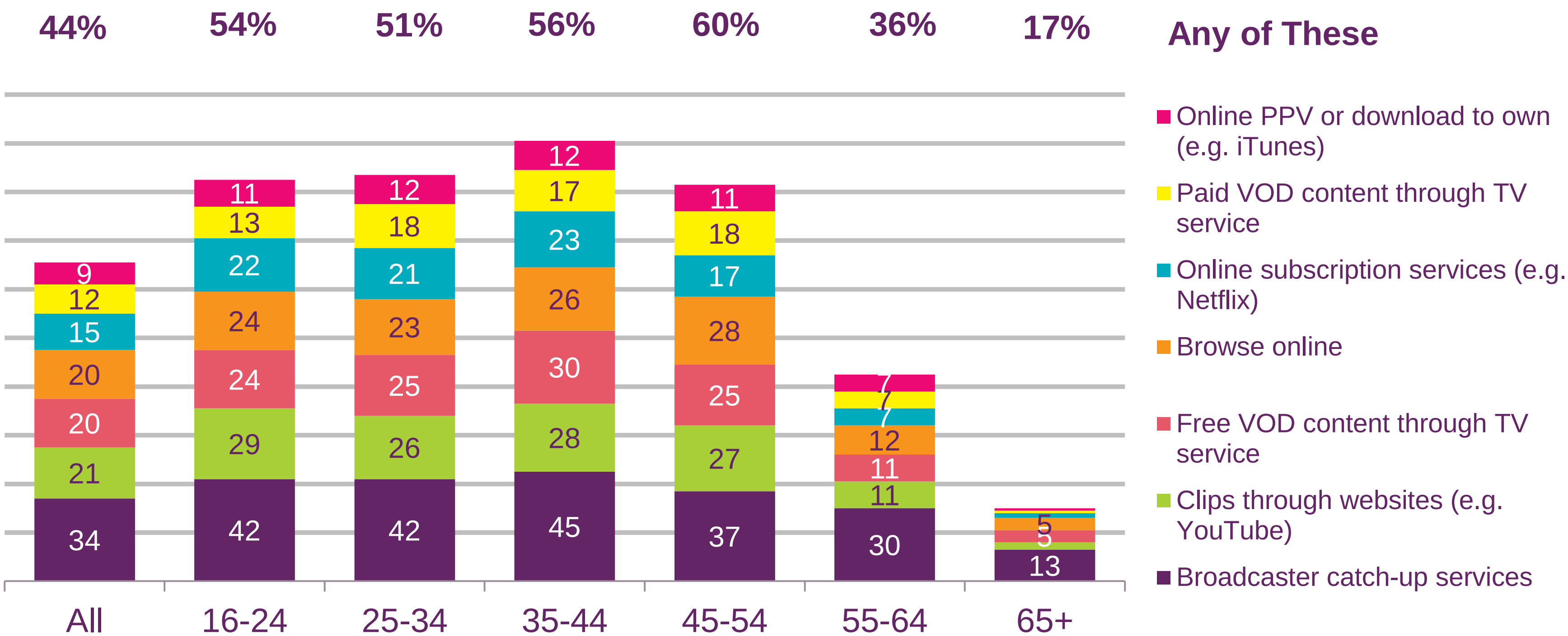
Smart TV sales and market share



Source: GfK

Figure 2.9

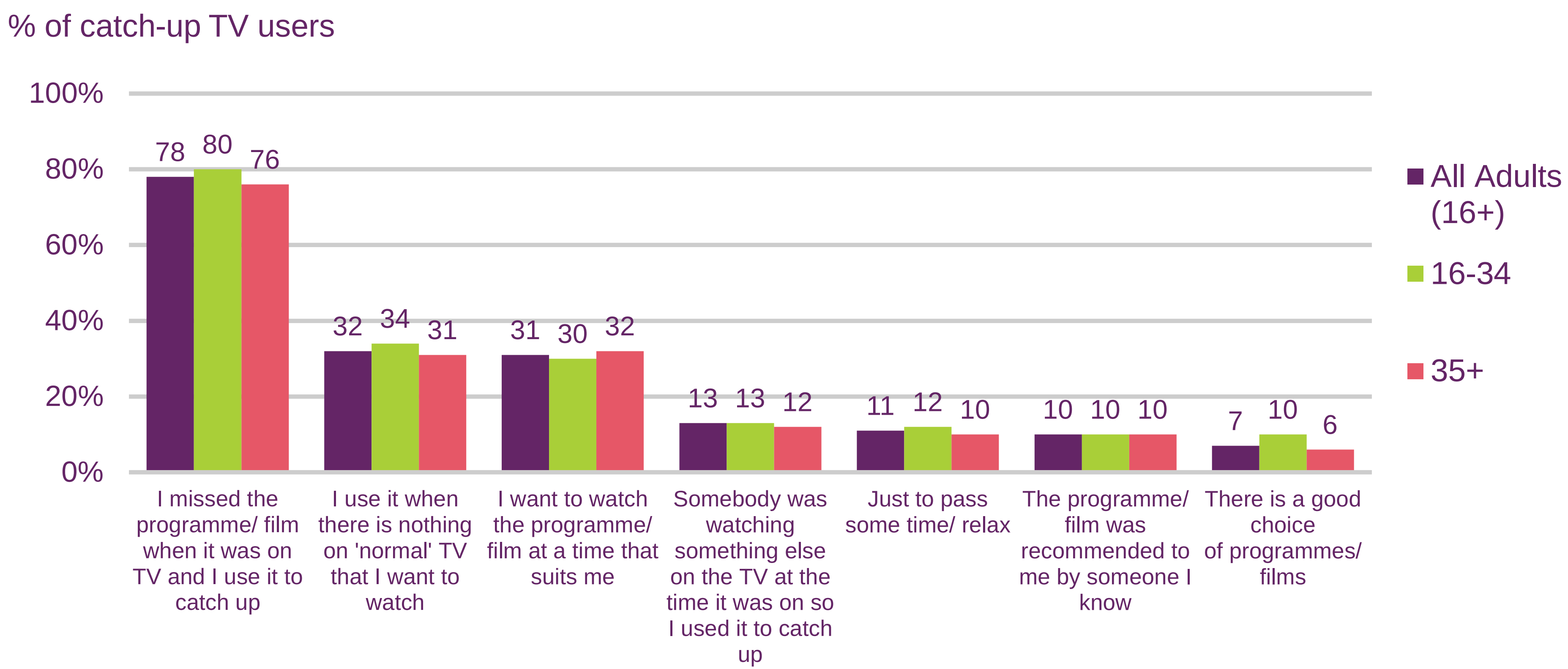
Activities undertaken on connected TV, by age



Source: Ofcom Media Tracker 2014. Base: All respondents (2074); 16-24 (297); 25-34 (331); 35-44 (333); 45-54 (333) 55-64 (318); 65+ (462). Only responses >3% labelled. Prompted, multicode. Significance testing shows any difference at 'Any of these' level between any age group and all adults. 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 2.10

Reason for using catch up TV via a connected TV, by age

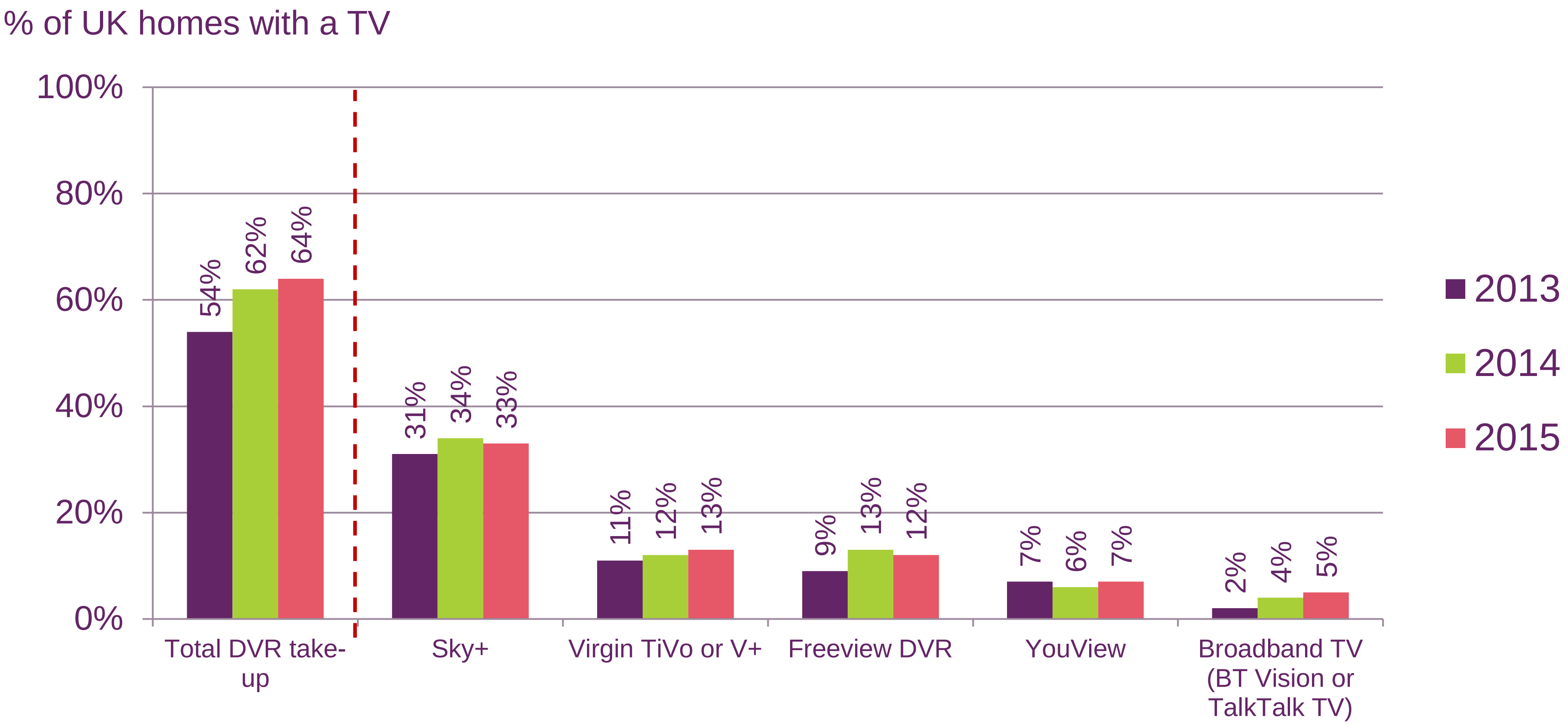


Source: Ofcom Media Tracker. Base: Those using broadcaster catch-up services through connected TV (659); 16-34 (252); 35+ (407). Unprompted, multicode. Showing responses of 5% or more among all adults. Significance testing shows any difference between age groups. Q16 - You said that you use broadcaster catch-up services. What would you say are the reasons that you use the broadcaster?

catch-up TV services?

Figure 2.11

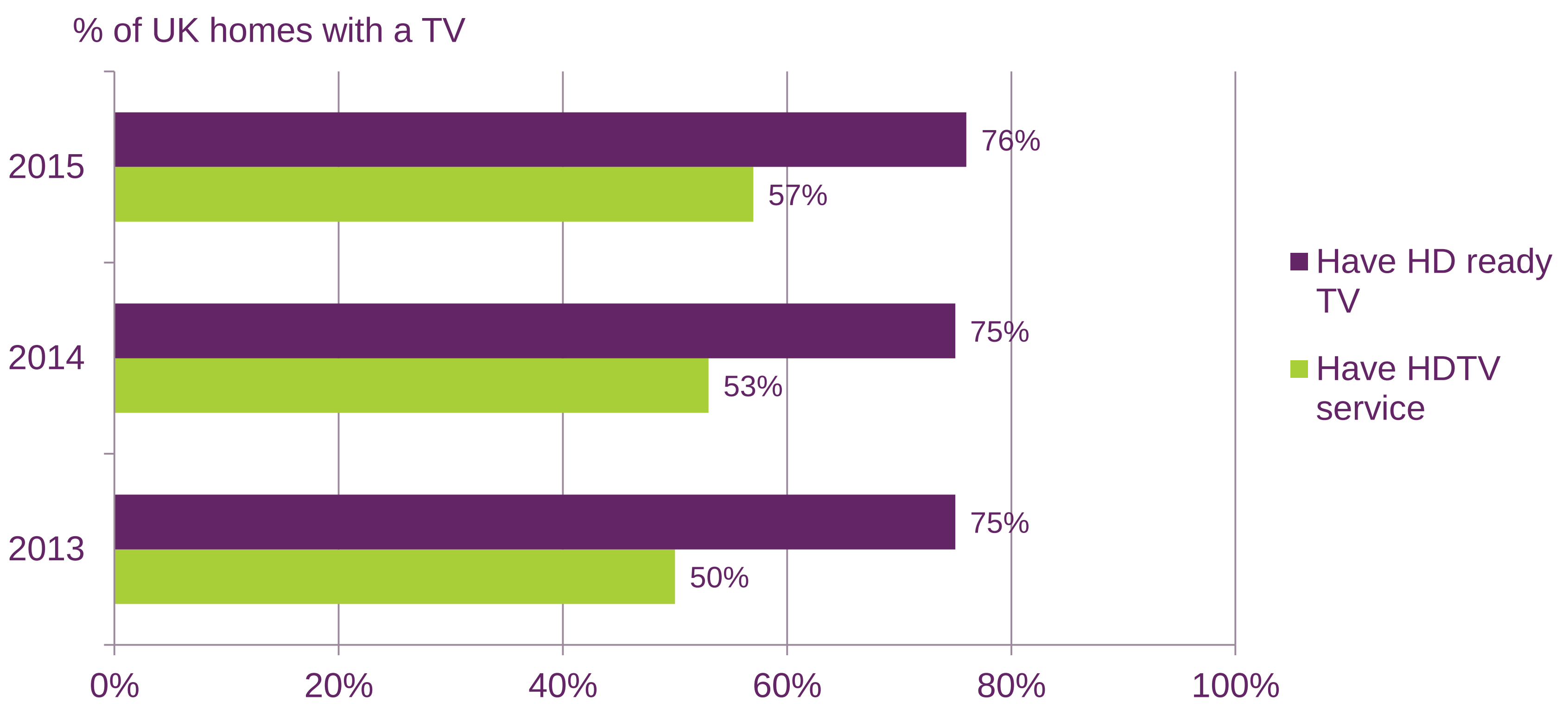
Take-up of DVRs, by platform



Source: Ofcom Technology Tracker, Q1 2013-2015
Base: All adults aged 16+ with a TV in the household: 2013 (3661), 2014 (3635), 2015 (3616)
Q: Does your household have Sky+? Q: Does your (Sky+,Virgin TiVo,YouView etc.) set-top box allow you to record and store TV programmes, and also pause and rewind live TV programmes?

Figure 2.12

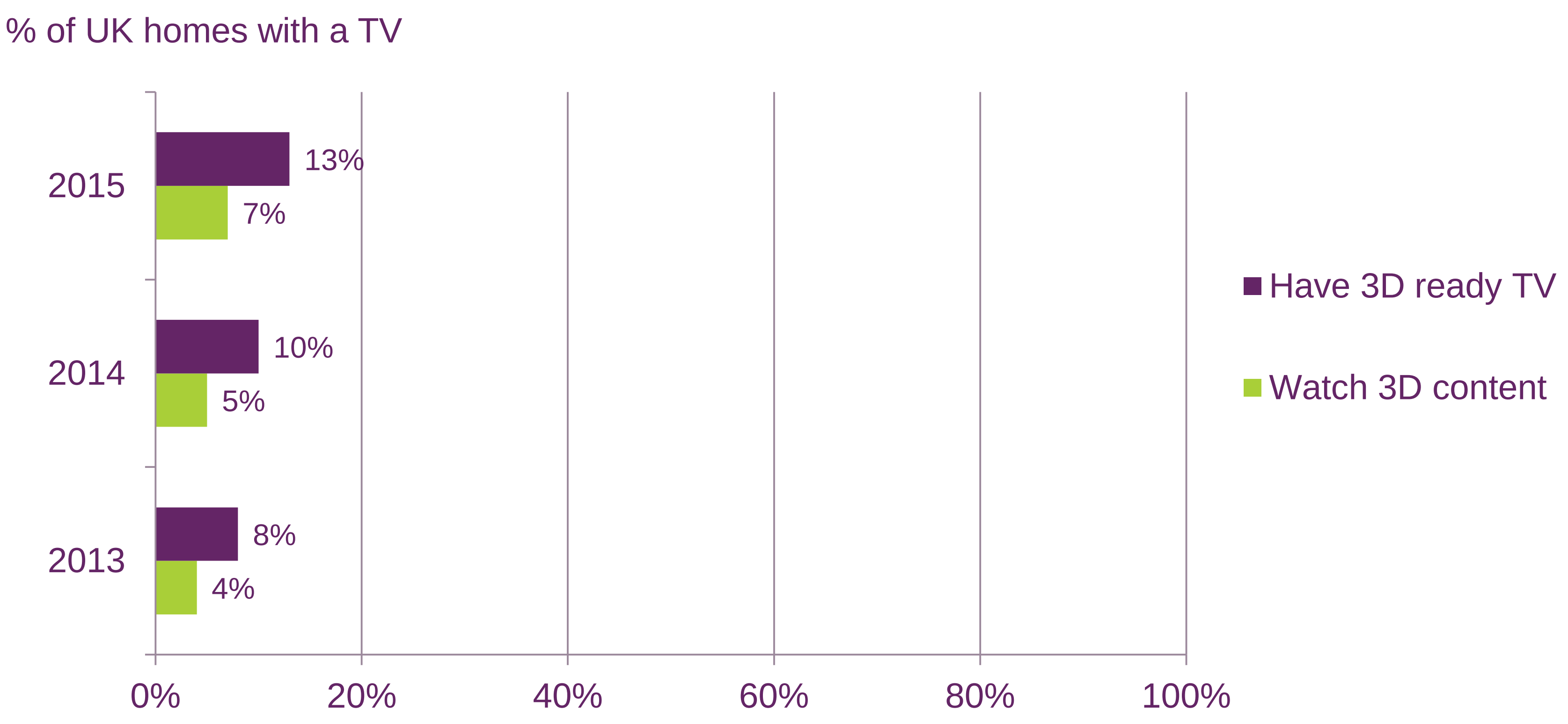
Take-up of HD-ready TVs and HDTV services



Source: Ofcom Technology Tracker, Q1 2013-2015
Base: All adults aged 16+ with a TV in the household: 2013 (3661), 2014 (3635), 2015 (3616)
QH3(QH53): Is the MAIN TV in your household an HDTV set or HD ready? QH4 (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?

Figure 2.13

Take-up and use of 3D-ready TVs

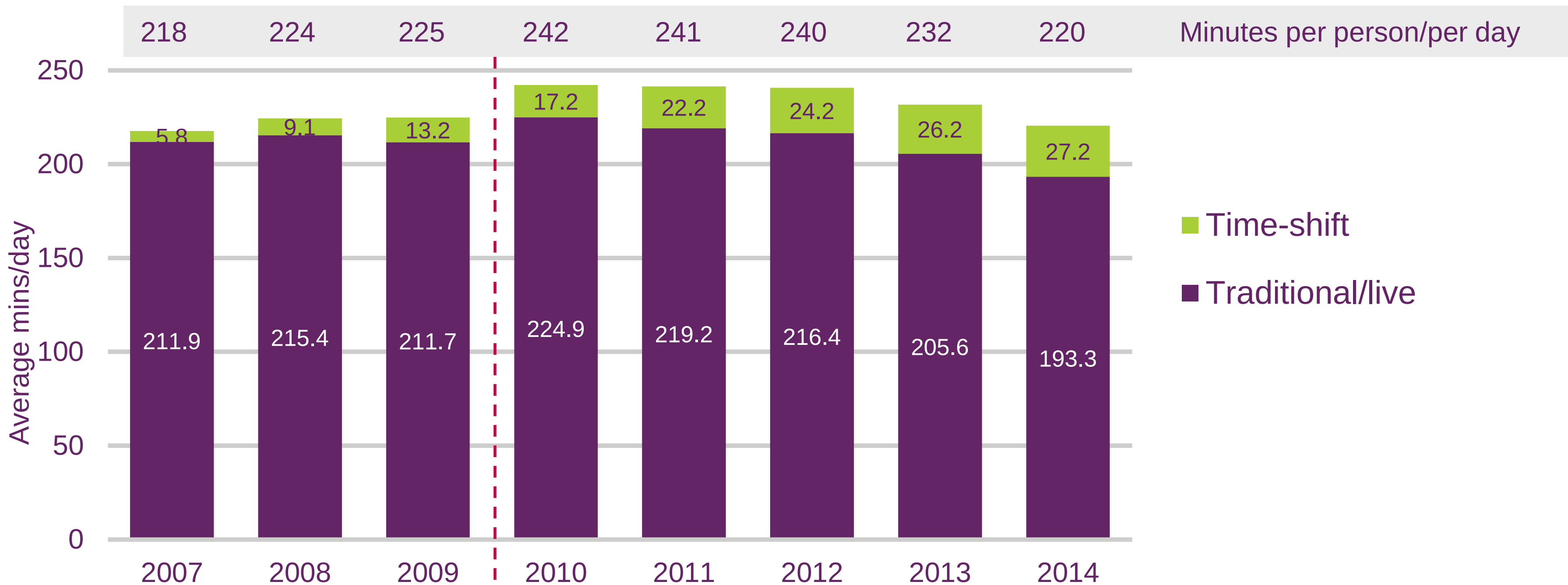


Source: Ofcom Technology Tracker, Q1 2013-2015
Base: All adults aged 16+ with a TV in the household: 2013 (3661), 2014 (3635), 2015 (3616)
QH4 (QH57). Is the MAIN TV in your household 3D ready? IF NECESSARY - By this I mean that the TV can display pictures in 3D from specific channels (such as Sky 3D) or when watching 3D DVDs or Blu-ray discs or when playing 3D video games. / QH5 (QH58). Do you or anyone in your household watch 3D content on your TV - whether from 3D TV channels, 3D DVDs or Blu-ray discs or 3D video games?

Figure 2.14

Traditional TV viewing vs. time-shifted minutes: all individuals

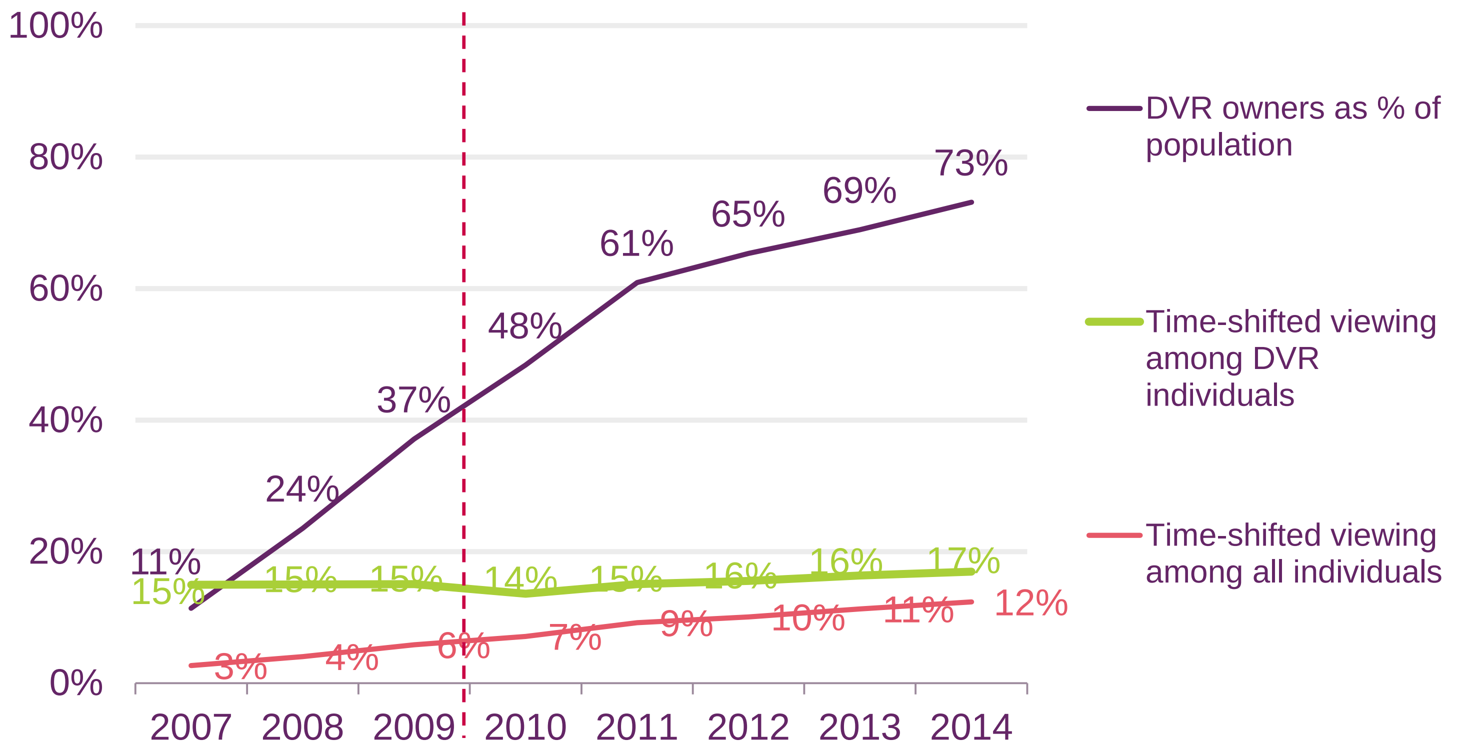
Average minutes of viewing/day by type of activity: Total TV, individuals 4+, 2007-2014



Source: BARB, Network, Some variation in figures due to rounding
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 2.15

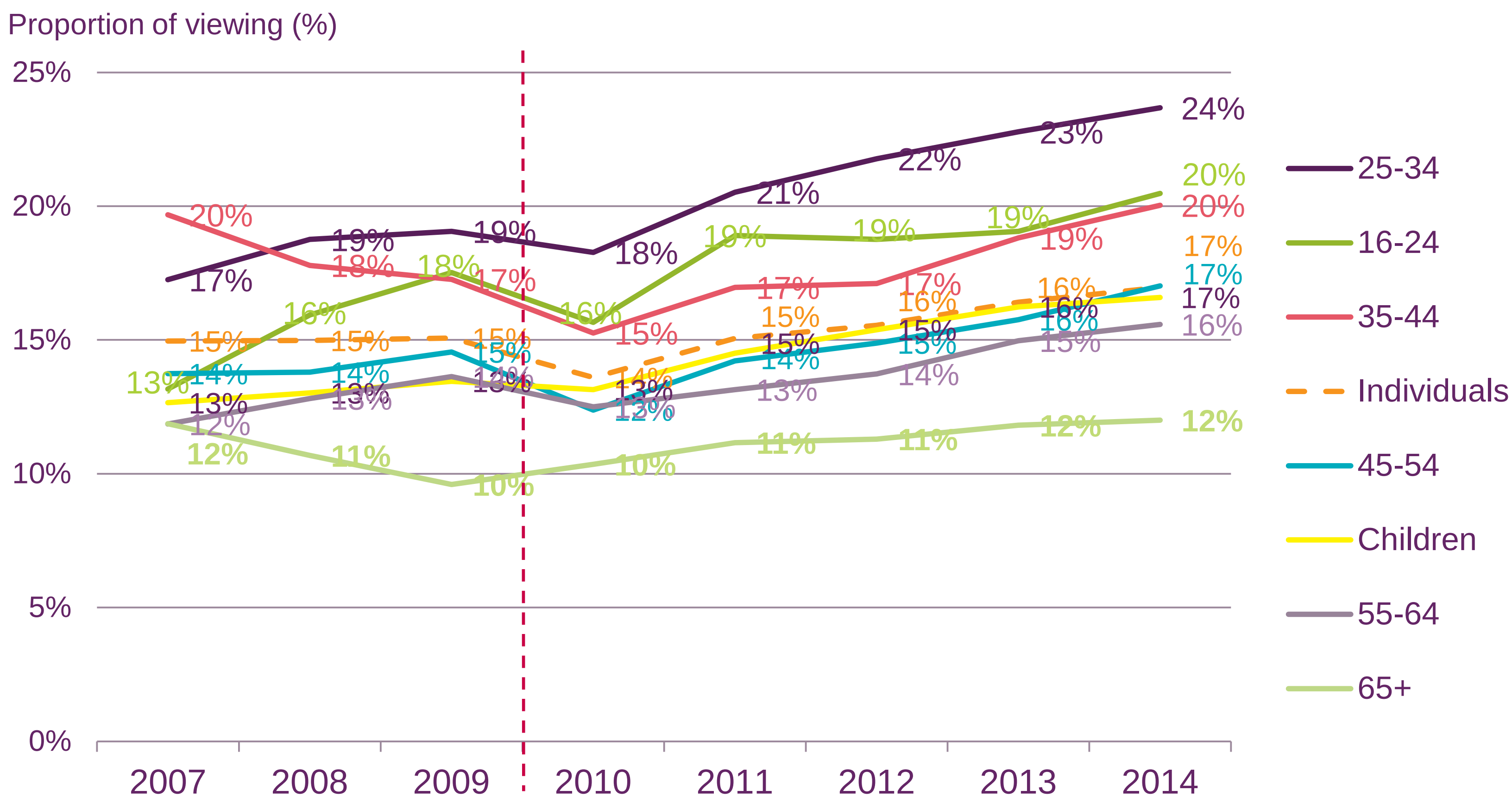
DVR take-up and time-shifted viewing: all individuals and individuals in DVR homes



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 2.16

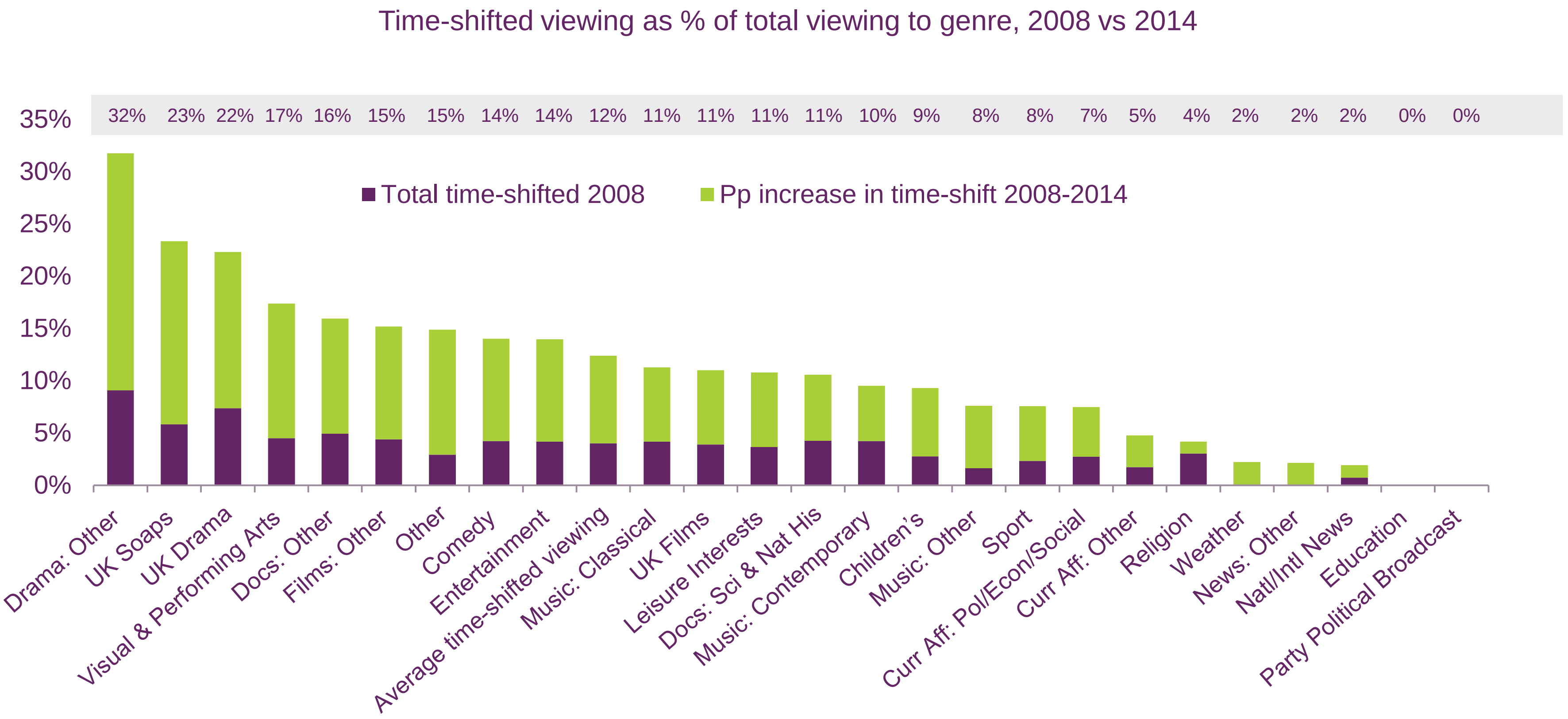
Proportion of time-shifted viewing, by age: DVR individuals



Source: BARB, Network, DVR owners, all homes. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.17

Proportion of time-shifted viewing, by genre: all individuals



Source: BARB, individuals 4+, Network Plus 2008, Network 2014. Network programming based on 4+ area filter. Ranked on proportion of programme genre watched time-shifted, descending. Genre groupings are based on BARB genre codings, categorised by Ofcom.

Figure 2.18

Top five programmes in 2014, live vs. time-shifted: all individuals and DVR individuals

All individuals

Rank	Programme	Channel	Date	Day	Start time	Total Average audience 000s	% Live	% watched on the same day as live	% watched up to 7 days after broadcast	% of live viewing watched with other people
1	WORLD CUP 2014: GER V ARG	BBC One	13/07/2014	Sunday	20:00:09	14,965	96%	4%	0%	68%
2	FIFA WORLD CUP 2014: URUGUAY V ENGLAND	ITV	19/06/2014	Thursday	18:59:00	13,875	95%	4%	0%	64%
3	THE GREAT BRITISH BAKE OFF	BBC One	08/10/2014	Wednesday	20:00:14	13,510	68%	23%	9%	64%
4	WORLD CUP 2014: BRA V GER	BBC One	08/07/2014	Tuesday	21:00:08	13,486	96%	3%	0%	61%
5	WORLD CUP 2014: ENG V ITA	BBC One	14/06/2014	Saturday	23:13:28	13,343	96%	2%	2%	67%

DVR individuals

Rank	Programme	Channel	Date	Day	Start time	Total Average audience 000s	% Live	% watched on the same day as live	% watched up to 7 days after broadcast	% of live viewing watched with other people
1	WORLD CUP 2014: GER V ARG	BBC One	13/07/2014	Sunday	20:00:09	11,252	95%	5%	0%	72%
2	THE GREAT BRITISH BAKE OFF	BBC One	08/10/2014	Wednesday	20:00:14	10,383	60%	30%	10%	64%
3	WORLD CUP 2014: ENG V ITA	BBC One	14/06/2014	Saturday	23:13:28	10,318	95%	3%	2%	70%
4	WORLD CUP 2014: BRA V GER	BBC One	08/07/2014	Tuesday	21:00:08	10,049	95%	5%	0%	64%
5	FIFA WORLD CUP 2014: URUGUAY V ENGLAND	ITV	19/06/2014	Thursday	18:59:00	9,993	94%	6%	0%	66%

Source: BARB. All individuals. Network programming based on 4+ area filter. Data are based on the top five most-watched programmes overall (live/traditional + time-shifted) based on the best single performing episode 000s, with proportion of live vs time-shifted and co-viewing % added for detail.

Figure 2.19

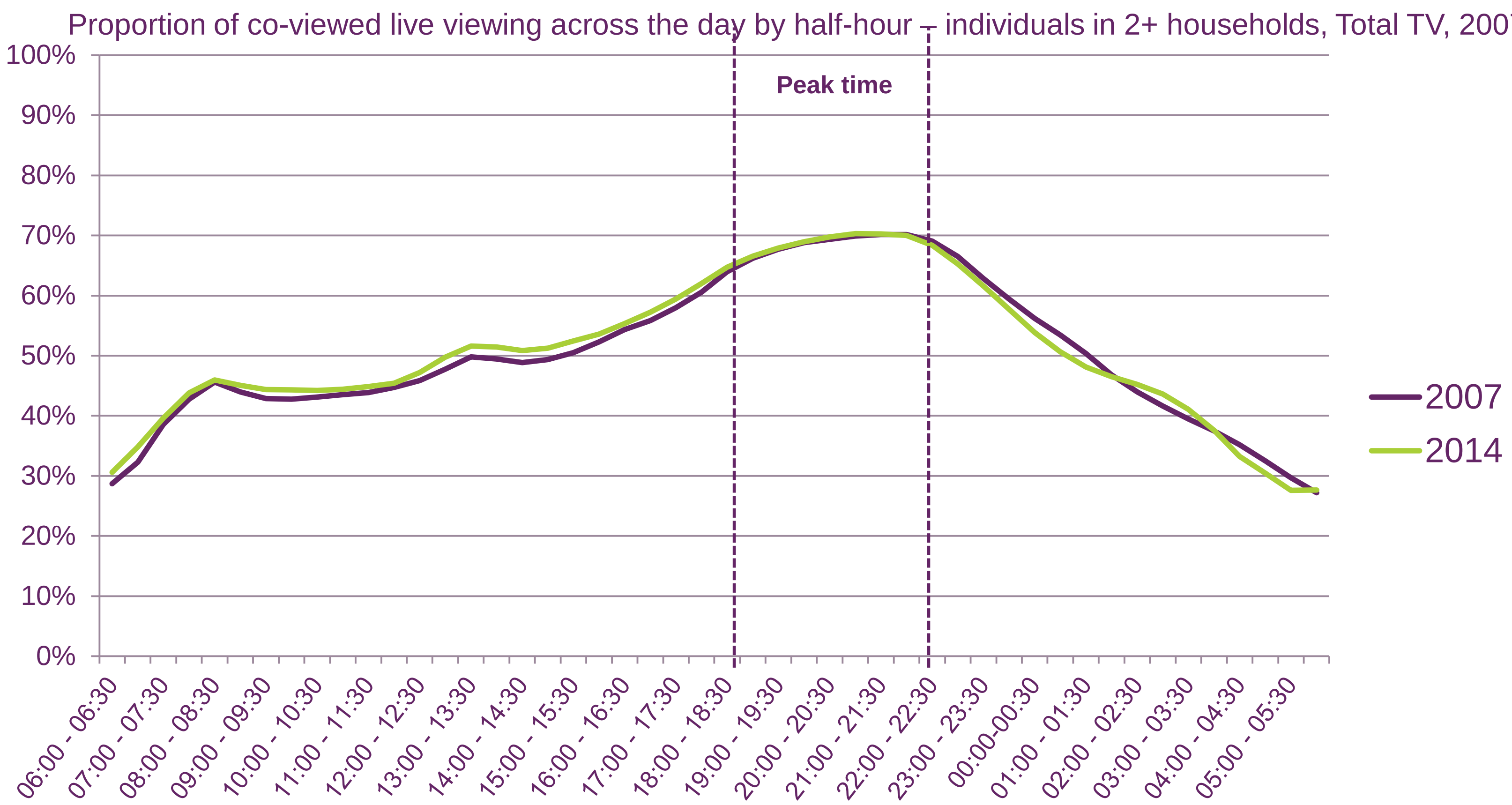
The top 20 most-watched programmes live (excl. sport): 2014

#	Programme	Channel	Date	Day	Start time	Total live average audience 000s	% Live	% watched on the same day as live	% watched up to 7 days after broadcast
1	NEW YEAR'S EVE FIREWORKS	BBC One	31/12/2014	Wednesday	23:59:01	11,426	91%	2%	6%
2	THE GREAT BRITISH BAKE OFF	BBC One	08/10/2014	Wednesday	20:00:14	9,176	68%	23%	9%
3	BRITAIN'S GOT TALENT (SERIES 8)	ITV	12/04/2014	Saturday	19:59:12	8,936	75%	14%	7%
4	STRICTLY COME DANCING	BBC One	20/12/2014	Saturday	18:29:55	8,831	76%	16%	8%
5	QUEEN AND ADAM LAMBERT ROCK BIG BEN LIVE	BBC One	31/12/2014	Wednesday	00:10:01	8,792	93%	4%	4%
6	STRICTLY COME DANCING: THE RESULTS	BBC One	20/12/2014	Saturday	20:50:10	8,784	76%	12%	12%
7	I'M A CELEBRITY GET ME OUT OF HERE! (SER	ITV	16/11/2014	Sunday	21:02:05	8,636	74%	14%	8%
8	CORONATION STREET	ITV	20/01/2014	Monday	20:29:00	8,477	80%	12%	6%
9	CALL THE MIDWIFE	BBC One	19/01/2014	Sunday	20:00:29	8,250	73%	12%	15%
10	THE EUROVISION SONG CONTEST	BBC One	10/05/2014	Saturday	20:00:02	8,034	90%	8%	2%
11	THE X FACTOR RESULTS (SERIES 11)	ITV	14/12/2014	Sunday	20:02:35	7,969	81%	13%	3%
12	CHILDREN IN NEED	BBC One	14/11/2014	Friday	19:30:03	7,567	89%	9%	3%
13	THE X FACTOR (SERIES 11)	ITV	30/08/2014	Saturday	20:04:55	7,277	72%	18%	6%
14	SPORT RELIEF	BBC One	21/03/2014	Friday	18:59:00	7,236	90%	7%	3%
15	DOWNTON ABBEY	ITV	02/11/2014	Sunday	21:02:42	7,176	70%	10%	16%
16	BRITAIN'S GOT TALENT RESULT (SERIES 8)	ITV	26/05/2014	Monday	21:34:10	6,991	82%	11%	6%
17	THE VOICE UK	BBC One	08/02/2014	Saturday	19:12:17	6,940	74%	16%	10%
18	EASTENDERS	BBC One	21/04/2014	Monday	19:59:23	6,869	76%	16%	9%
19	SIX O'CLOCK NEWS	BBC One	14/02/2014	Friday	18:00:06	6,856	97%	3%	0%
20	SHERLOCK	BBC One	01/01/2014	Wednesday	20:59:48	6,843	54%	18%	28%

Source: BARB. All individuals. Network programming based on 4+ area filter. Programmes with a minimum duration of 10 minutes. Excludes sports programming. Data are based on the top 20 most-watched programmes (best episode) based on live audience in 000s with proportions of time-shifted viewing added for detail.

Figure 2.20

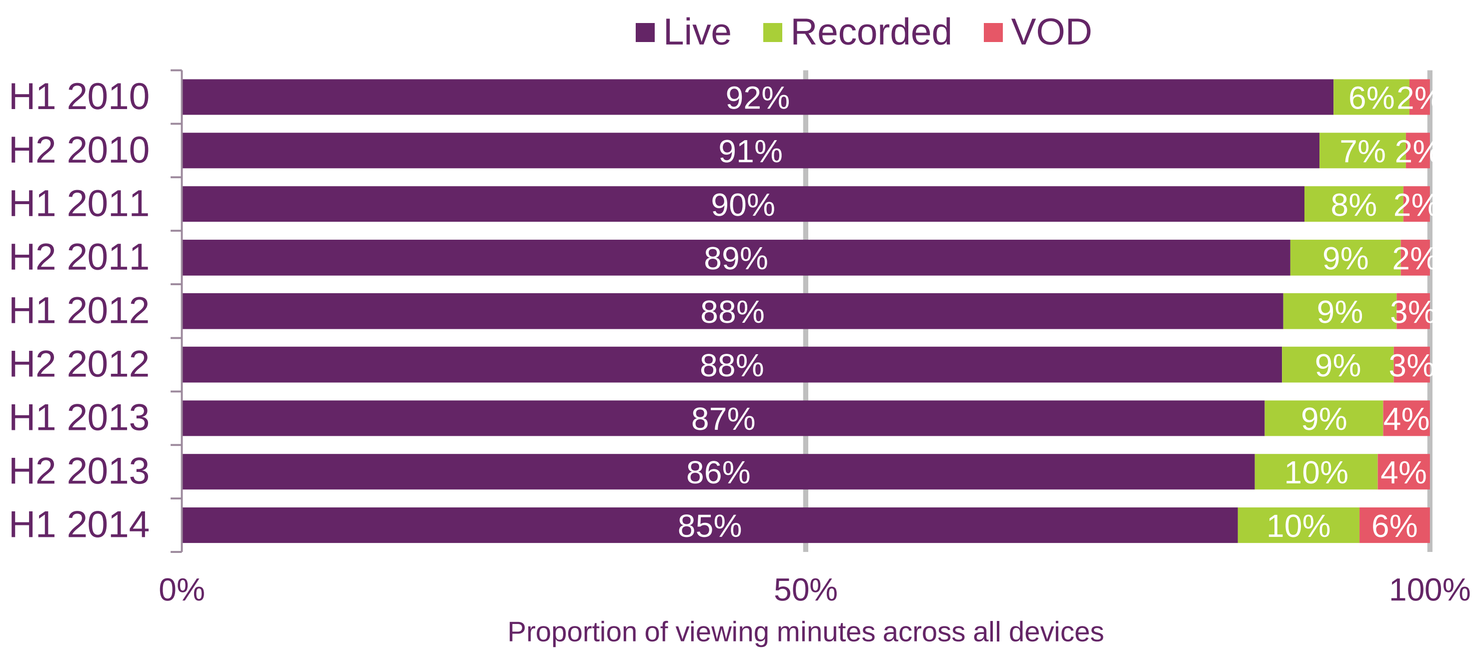
Proportion of traditional TV viewing that is co-viewed, by day part: 2007 and 2014



Source: BARB. Individuals in 2+ households, Network. Based on co-viewing during live/traditional broadcast split by half-hour time bands.

Figure 2.21

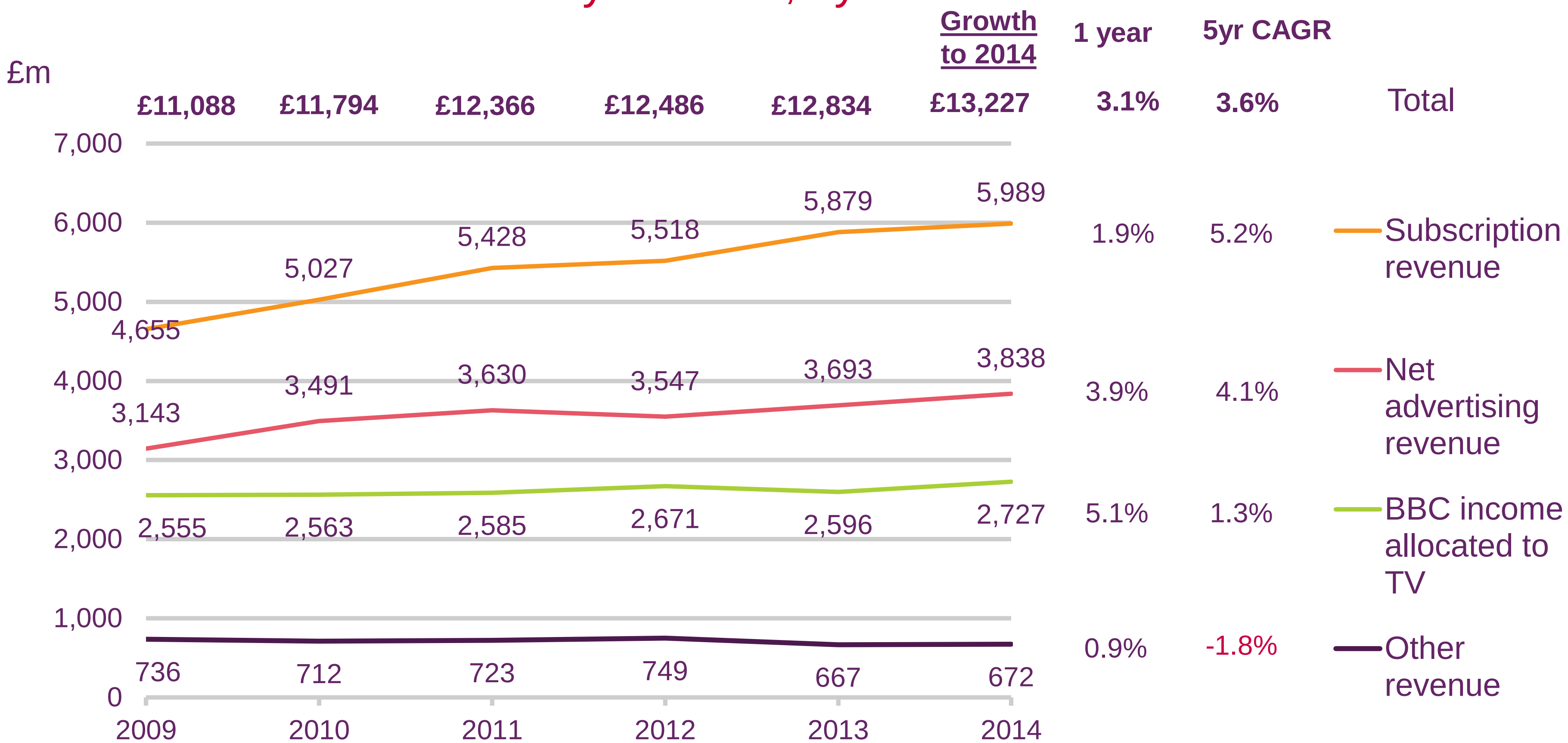
Proportion of all AV viewing: traditional TV viewing vs. DVR and VoD



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

Figure 2.22

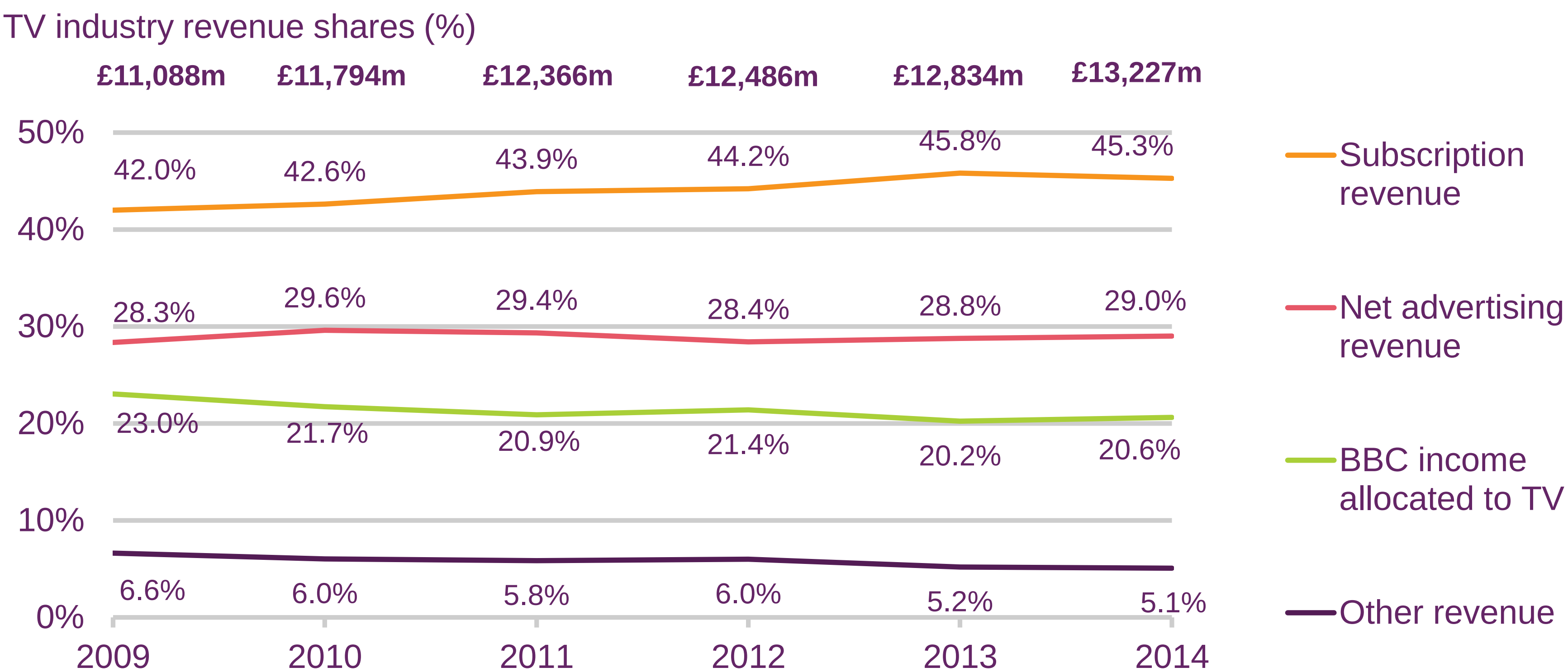
Total broadcast TV industry revenue, by source



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, TalkTalkTV and Channel 4 subscriber revenue as well as, in previous years, that of Setanta Sports, ESPN and Top Up TV in the UK (Republic of Ireland revenue is excluded). 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 2.23

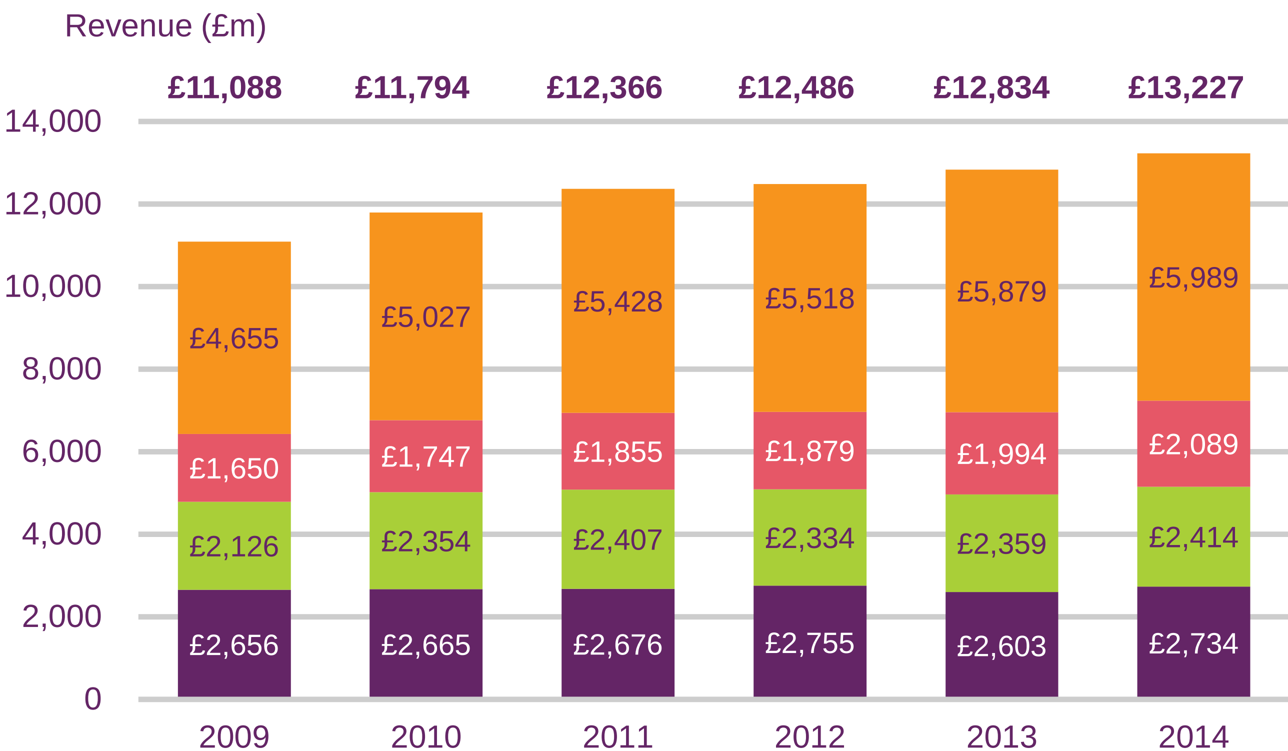
Total broadcast TV industry revenue, by share



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, TalkTalkTV and Channel 4 subscriber revenue as well as, in previous years, that of Setanta Sports, ESPN and Top Up TV in the UK (Republic of Ireland revenue is excluded). 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 2.24

Total TV industry revenue, by sector



Growth

1 year	5yr CAGR	
3.1%	3.6%	Total
1.9%	5.2%	Platform operators
4.8%	4.8%	Commercial multichannels
2.4%	2.6%	Main commercial PSB channels
5.0%	0.6%	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, Setanta Sports, ESPN and Top Up TV in the UK (Republic of Ireland revenue is excluded).The platform operators figures also contain subscription revenue for Channel 4. Main commercial PSB channels comprise ITV/ITV Breakfast, STV, UTV, Channel Television, 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.

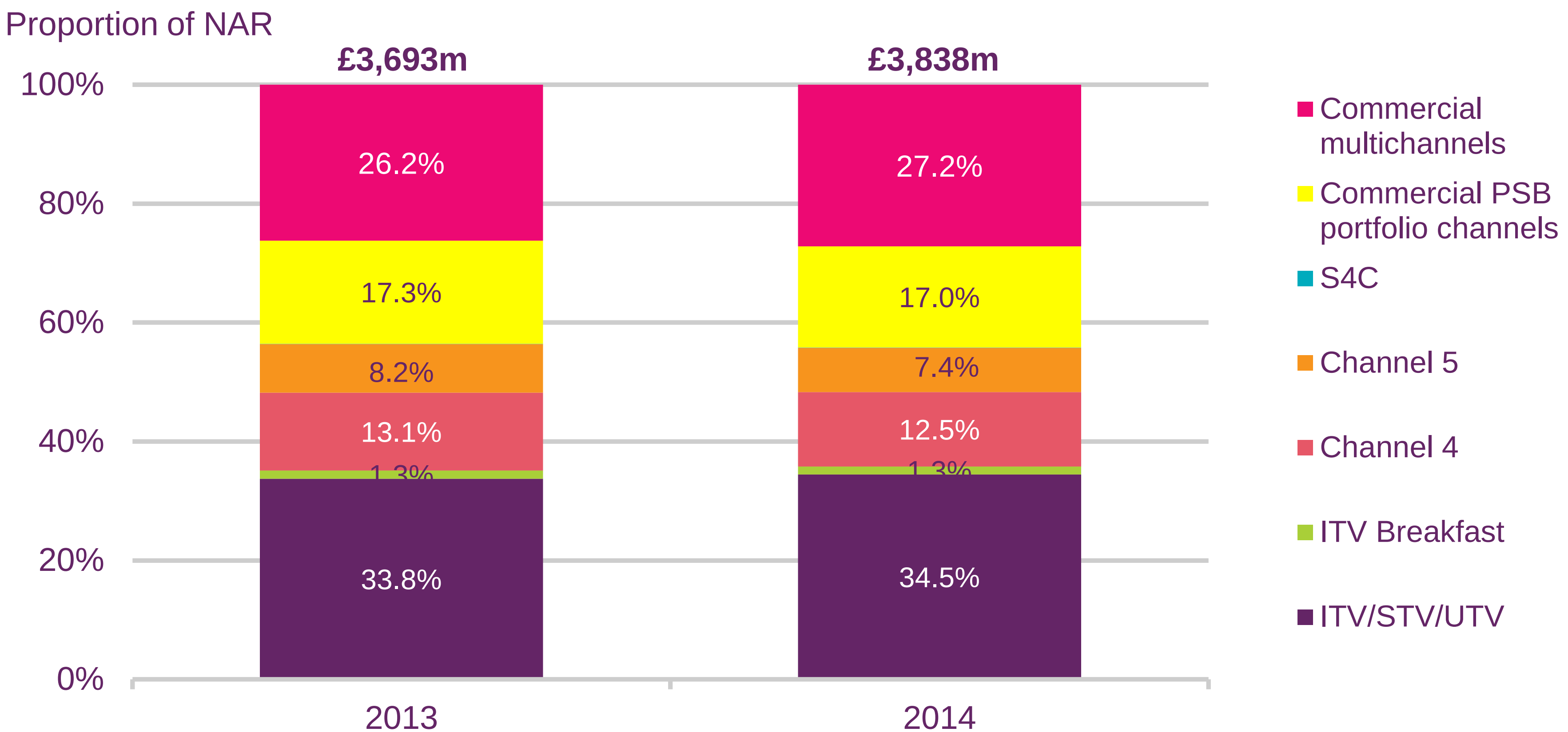
Figure 2.25

TV net advertising revenues, by source: 2009-2014

Source: Ofcom/broadcasters. Note: Figures expressed are in nominal terms and replace previous data published by Ofcom. Commercial PSB channels comprise ITV, STV, UTV, Channel Television, 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 and 5* (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 2.26

TV net advertising revenue market shares: 2013 - 2014

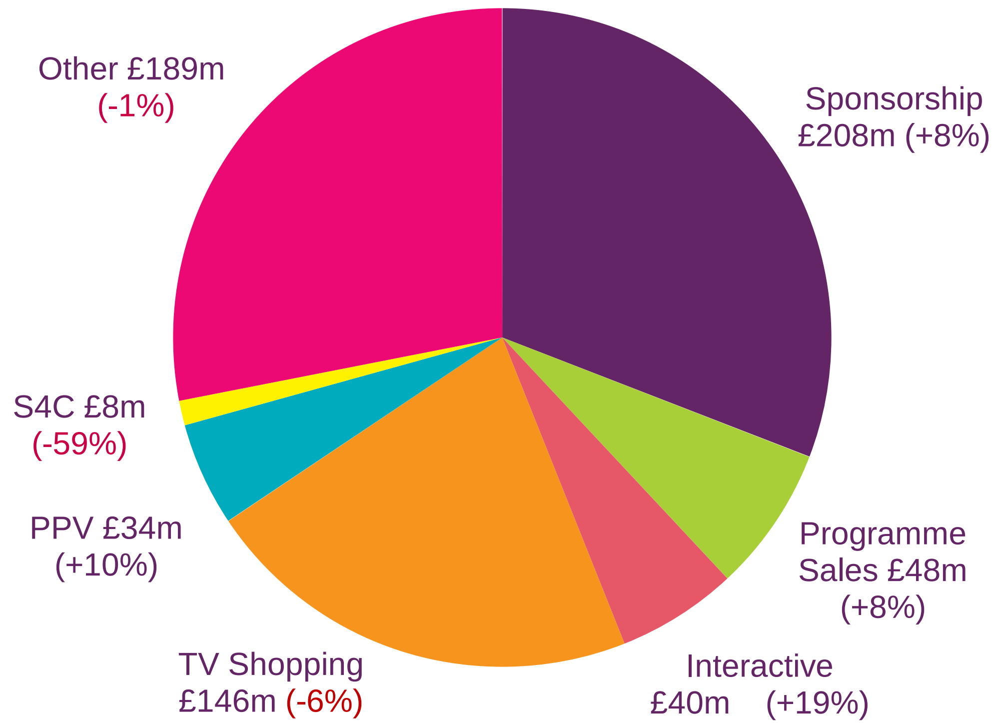


Source: Ofcom/broadcasters. Note: Totals are expressed in nominal terms. Revenues attributed to '+1' channels are included with those from their main channels.

Figure 2.27

Breakdown of other commercial TV channel revenue: 2013-2014

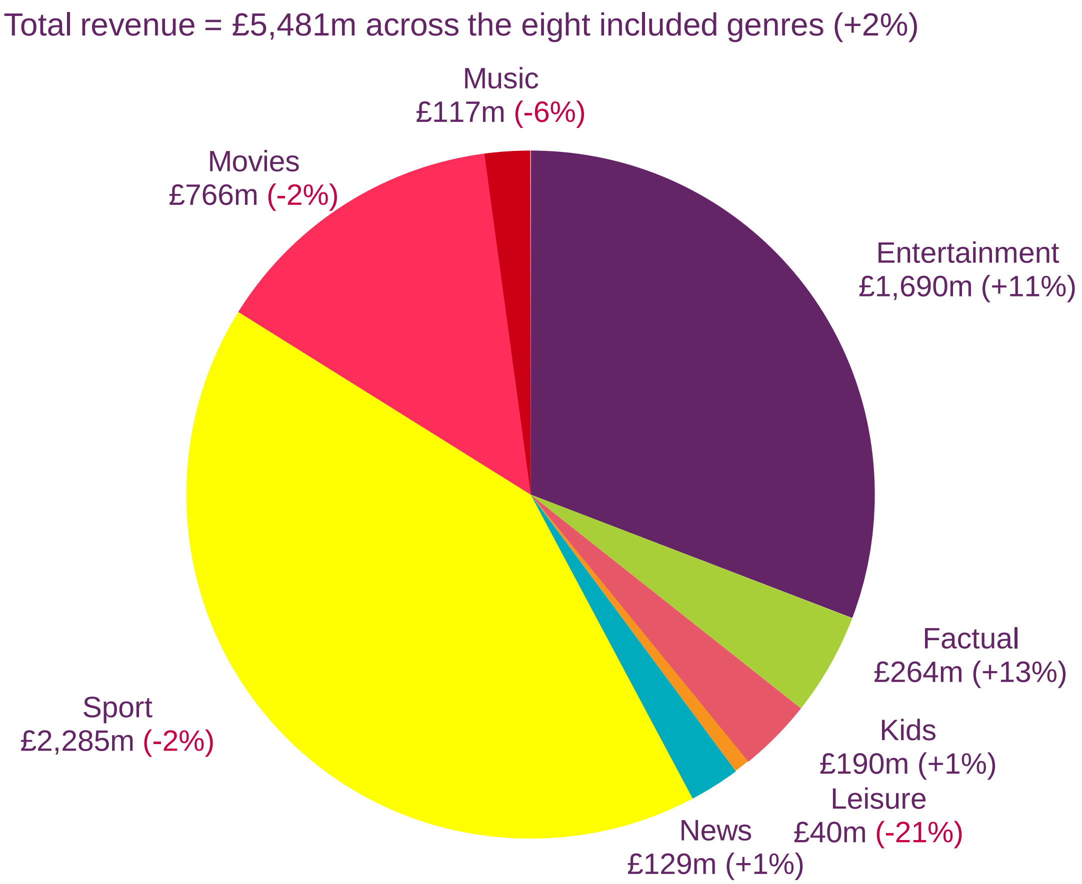
Total 'other' revenue = £672m (+1%)



Source: Ofcom/broadcasters. Note: Percentage figures in brackets represent year-on-year change for total non-broadcast revenue versus 2014. 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 2.28

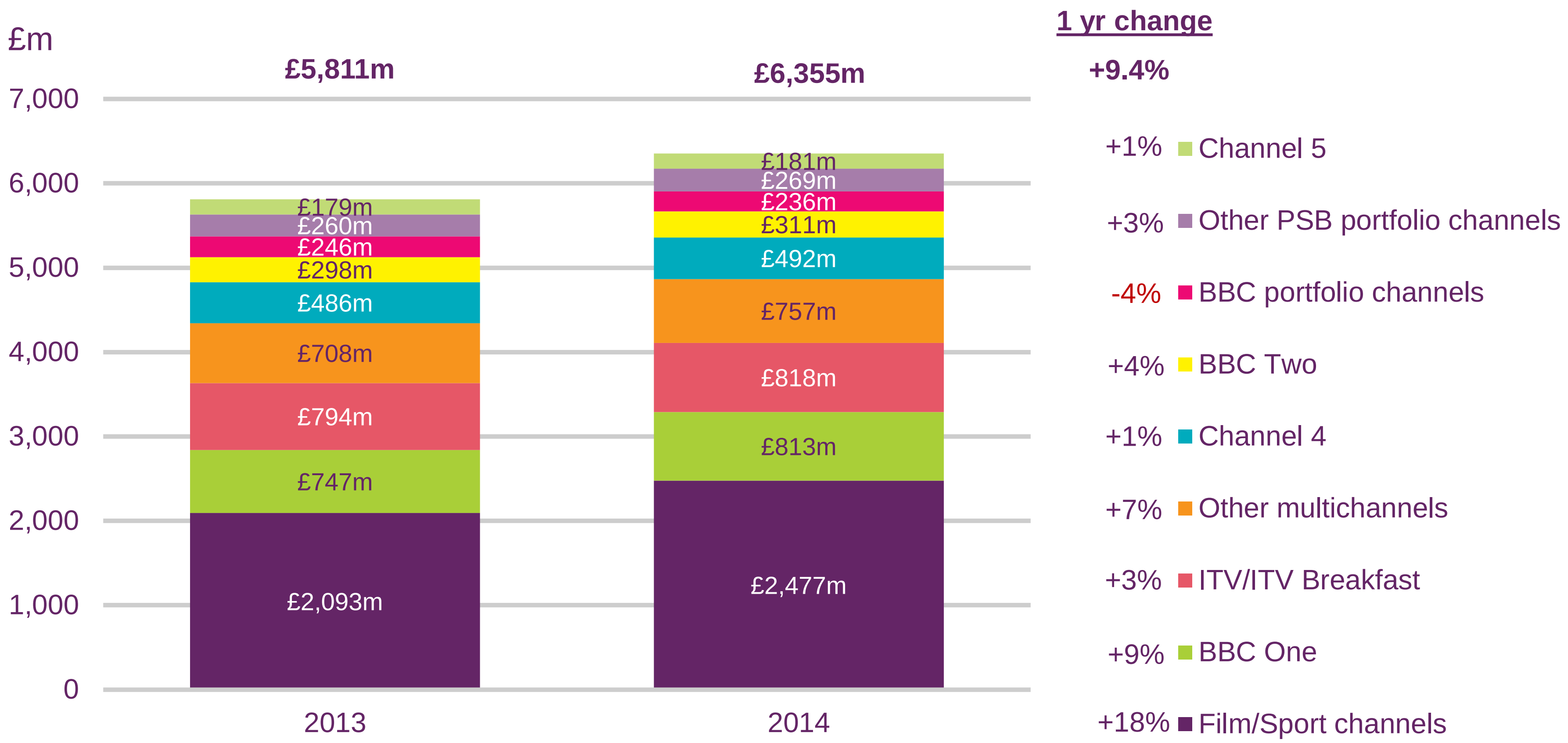
Revenue generated by multichannel broadcasters, by genre: 2013-2014



Source: Ofcom/broadcasters. Note: Percentage figures in brackets represent year-on-year change for total revenue compared to 2013. The figures in this chart include all sources of revenue accruing to multichannels and are expressed in nominal terms. This includes those set out in Figure 2.22 plus wholesale subscriber payments from platform operators.

Figure 2.29

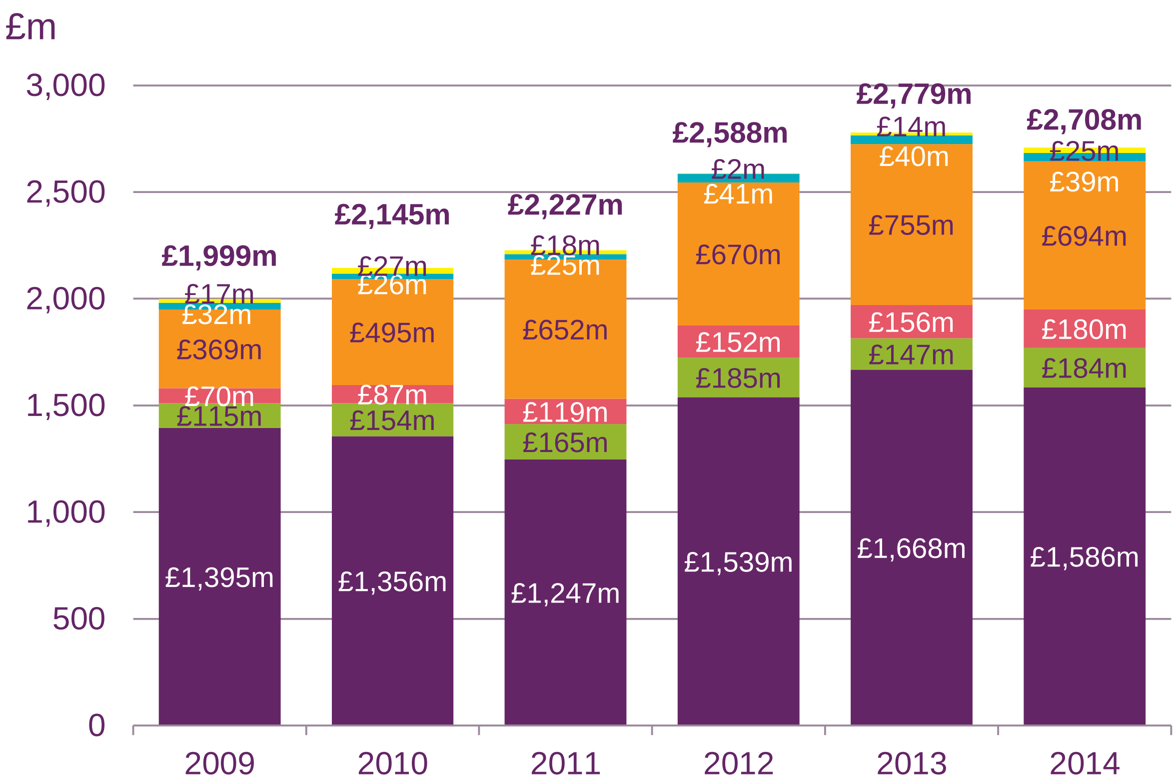
Spend on network TV programmes: 2013-2014



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 all genres (excluding sports and films). Programme spend comprises in-house productions, commissions from independents, acquired programmes and repeats (originations and acquisitions).

Figure 2.30

Independent producer TV-related revenues



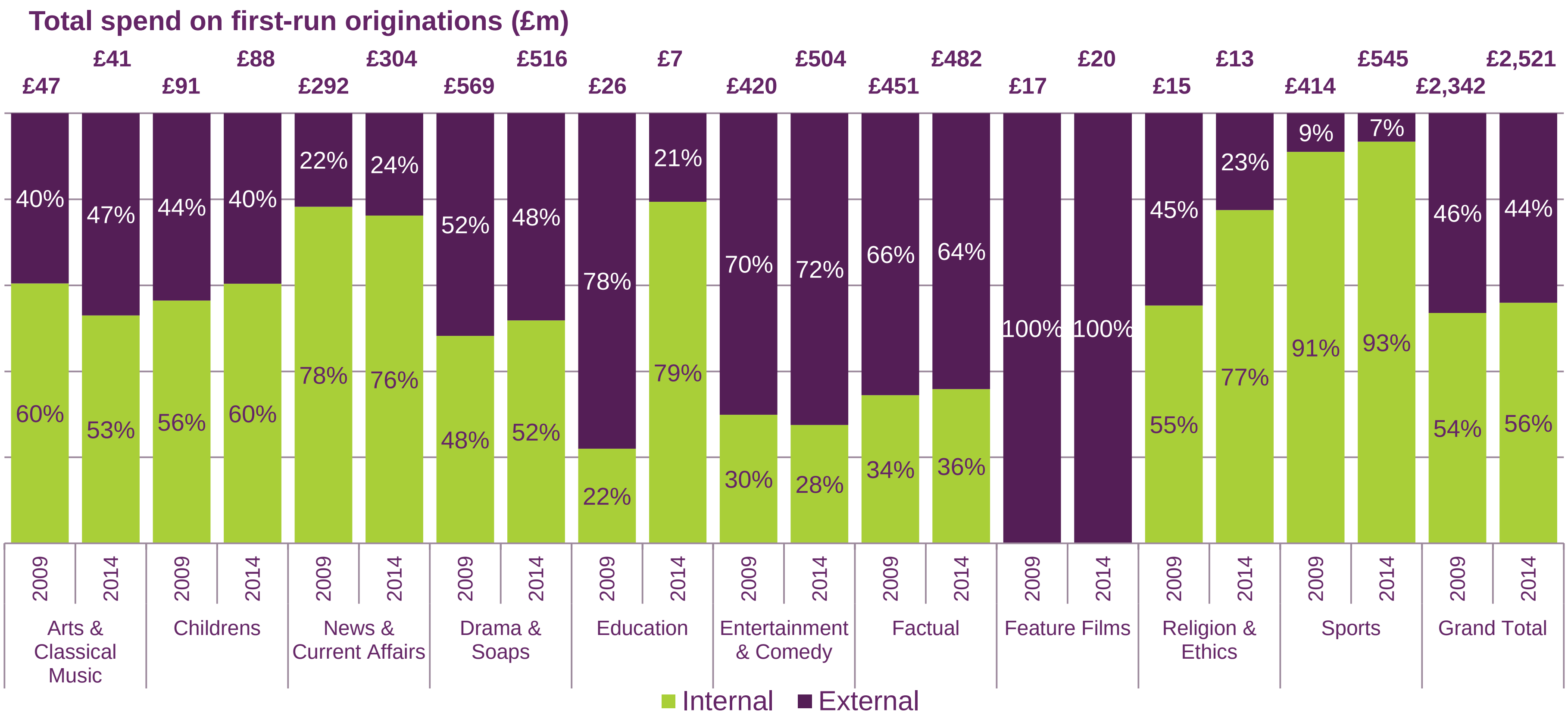
Growth

1 year	5 year CAGR	
-2.5%	**6.3%**	Total
84.0%	7.4%	Other UK
-2.0%	4.1%	Pre-production
-8.1%	13.5%	Other international income
15.7%	20.7%	International sales of UK finished programmes
24.8%	9.9%	UK rights income
-4.9%	2.6%	Primary UK commissions

Source: PACT Independent Production Sector Financial Census and Survey 2015. 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.

Fig 2.31

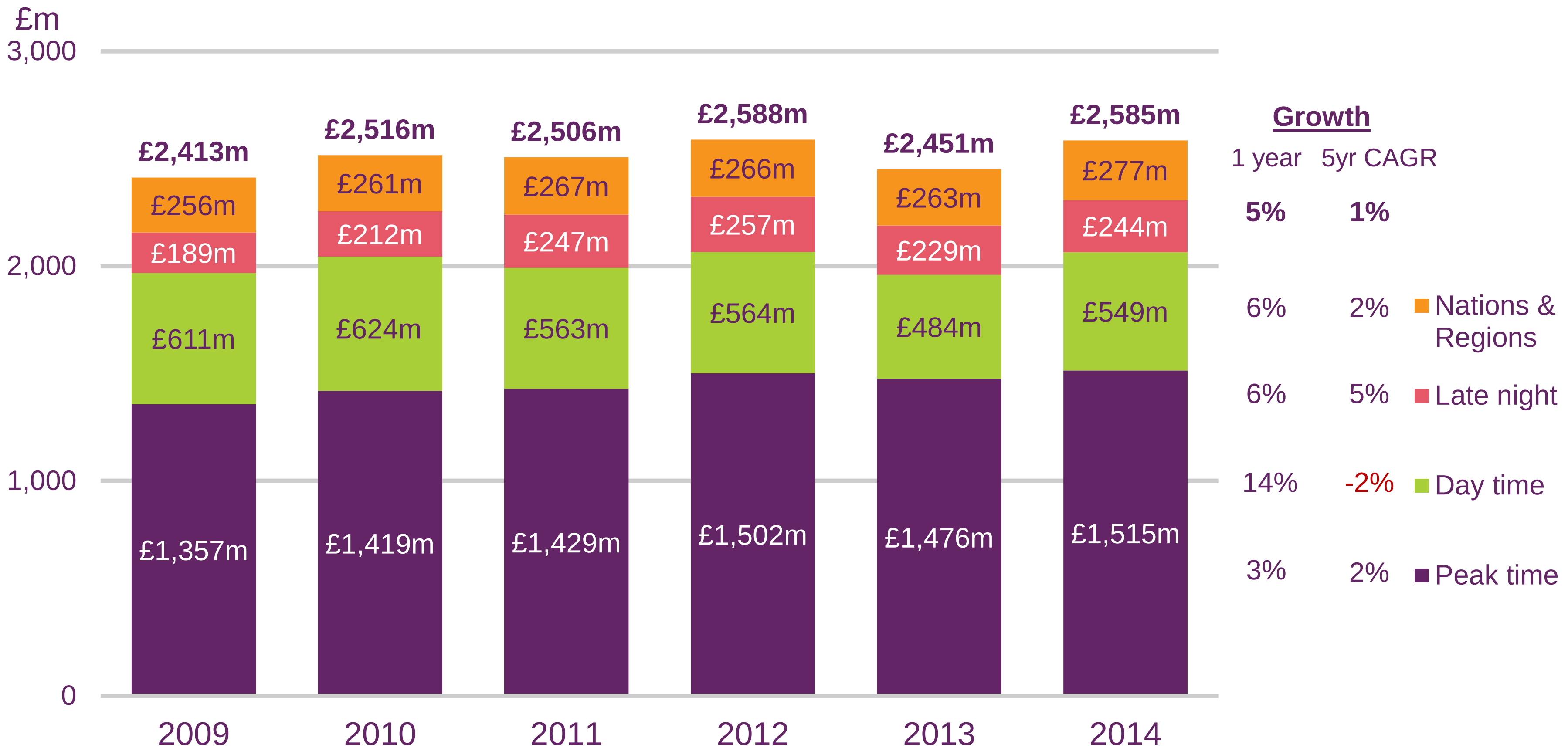
Relative share of spend on first-run UK-originated content, by genre, in-house vs. independent producers: 2009 and 2014



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

Figure 2.32

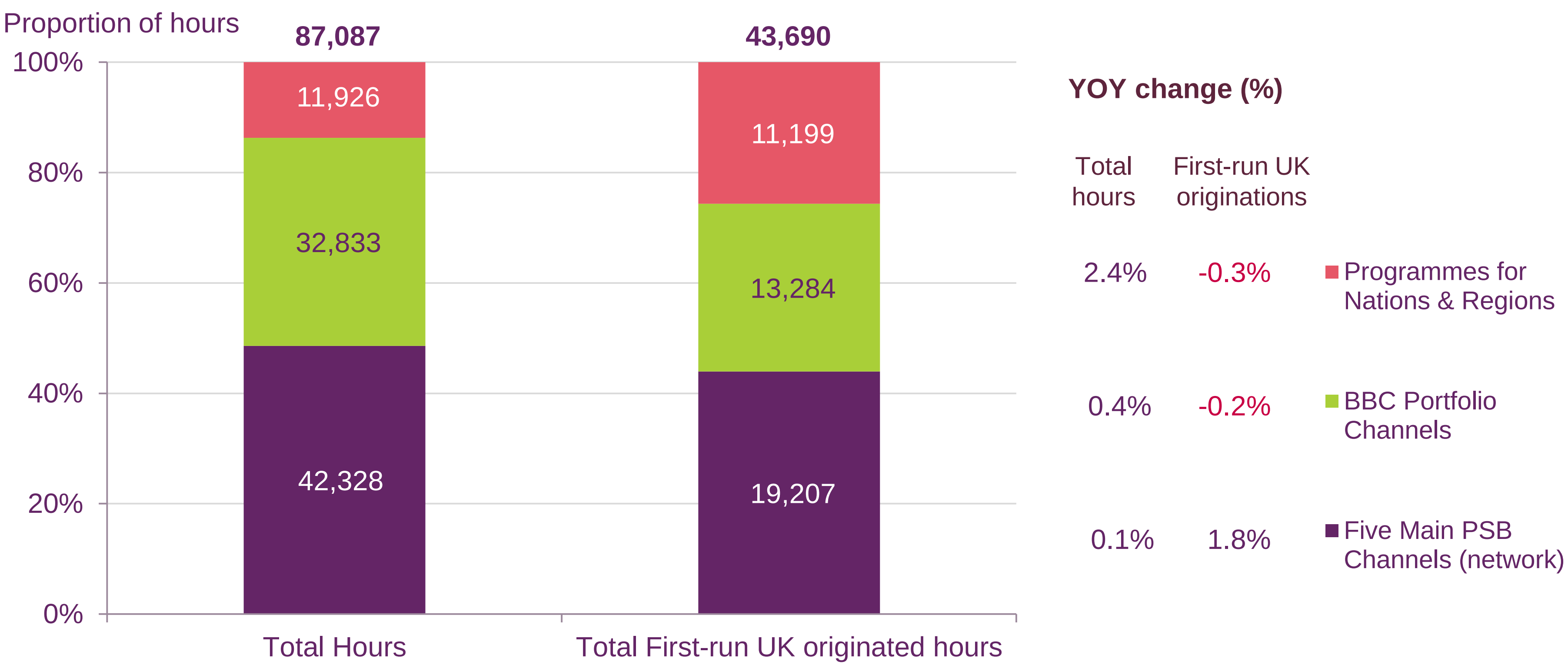
Spend on first-run UK originated output on the five main networks



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 do not include the BBC's portfolio channels, BBC Alba or S4C
.

Figure 2.33

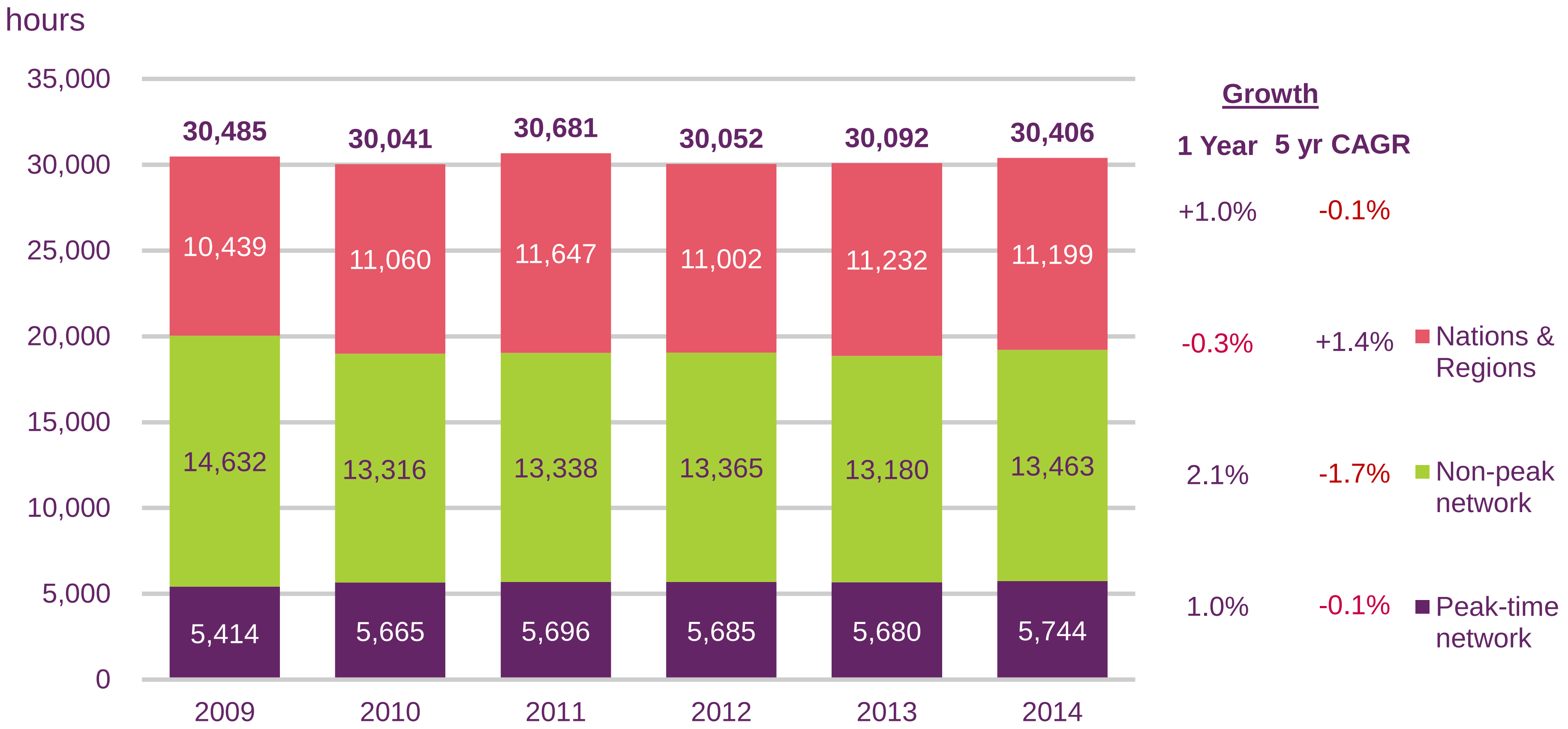
Total and first-run UK-originated hours of output on the PSB channels: 2014



Source: Ofcom/broadcasters. Note: The first-run figures include in-house productions and external commissions, but not first-run acquisitions. ITV Breakfast is included within the figures for the five main channels. Regional hours exclude Welsh and Gaelic-language programming but include a small proportion of Irish-language programmes.

Figure 2.34

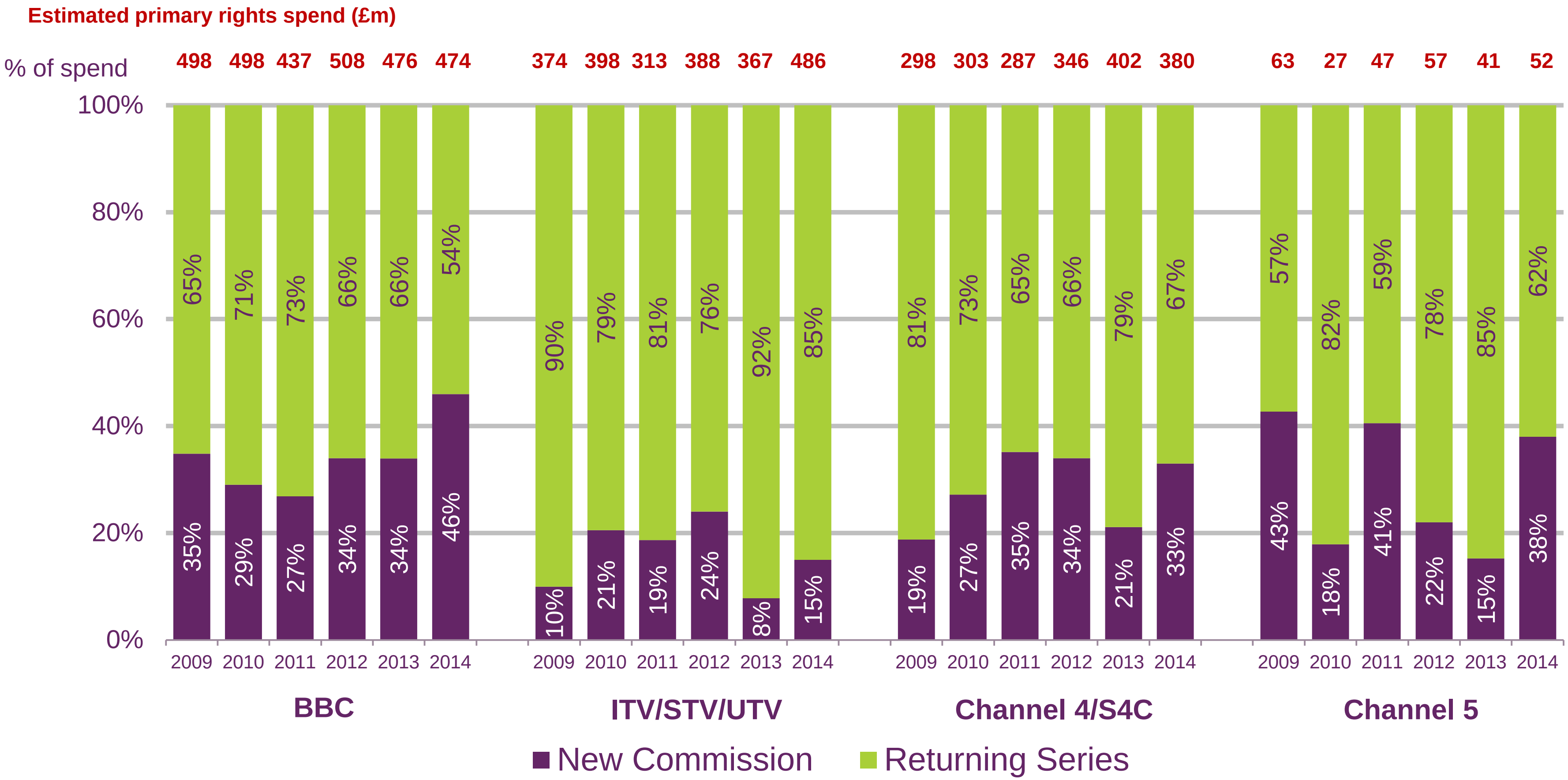
Hours of first-run UK originated output on the five main PSB channels



Source: Ofcom/broadcasters. Note: Figures include ITV Breakfast but do not include the BBC's portfolio channels. Regional hours exclude Welsh and Gaelic-language programming but do include a small proportion of Irish-language programmes.

Figure 2.35

Proportion of spend on new commissions vs. returning series: PSB groups

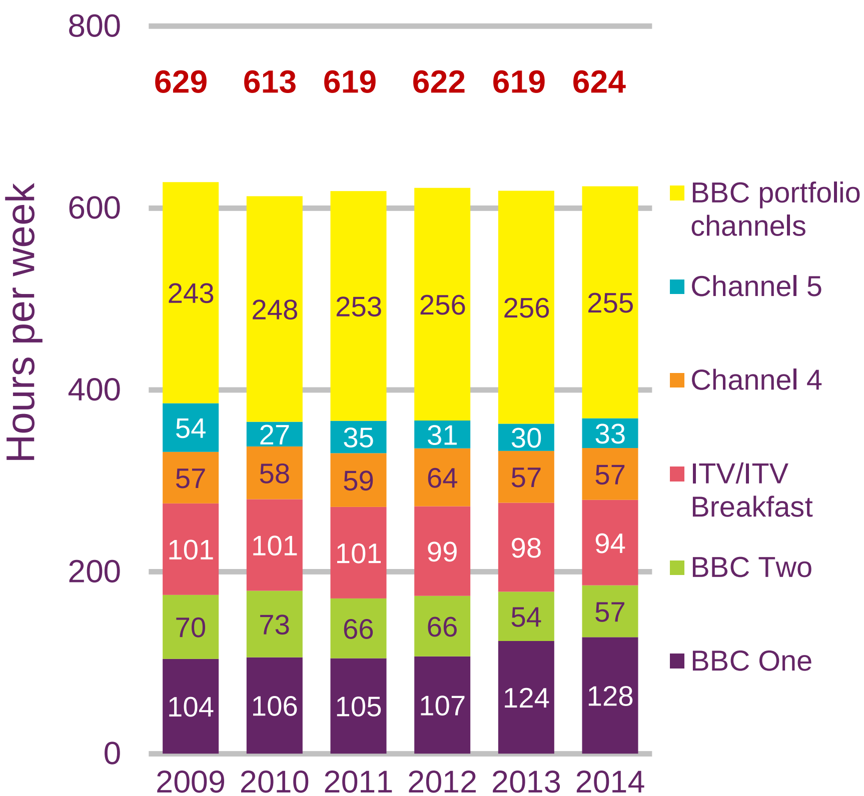


Source: PACT Independent Production Sector Financial Census and Survey 2015. Note: Figures include commissions by the PSB portfolio channels.

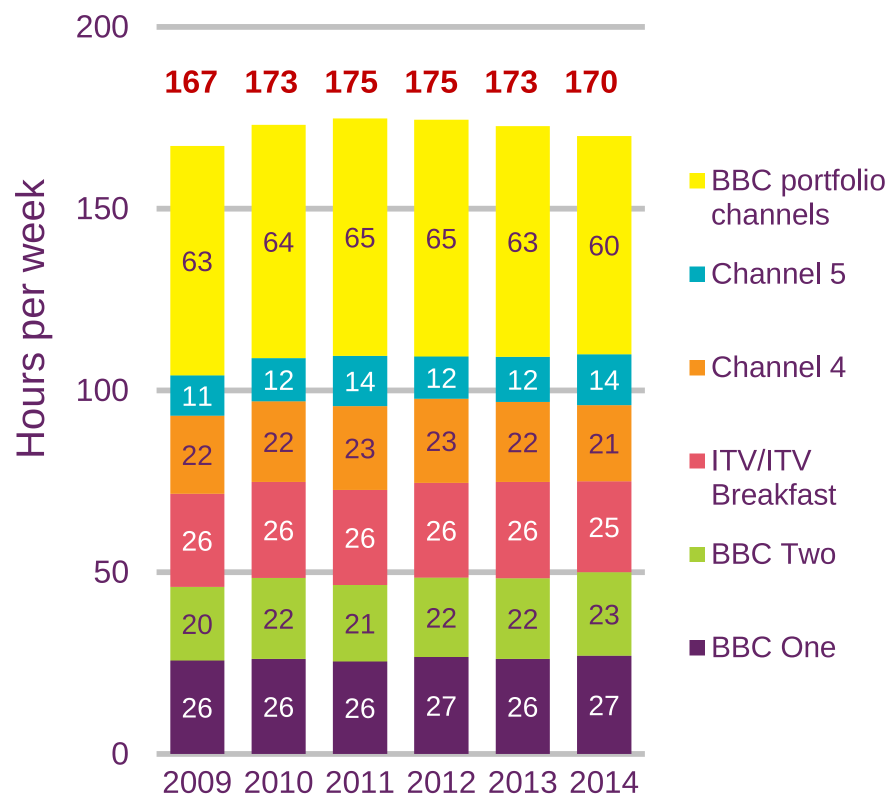
Figure 2.36

First-run UK-originated output by the PSB channels per week: all day and peak time

All Day



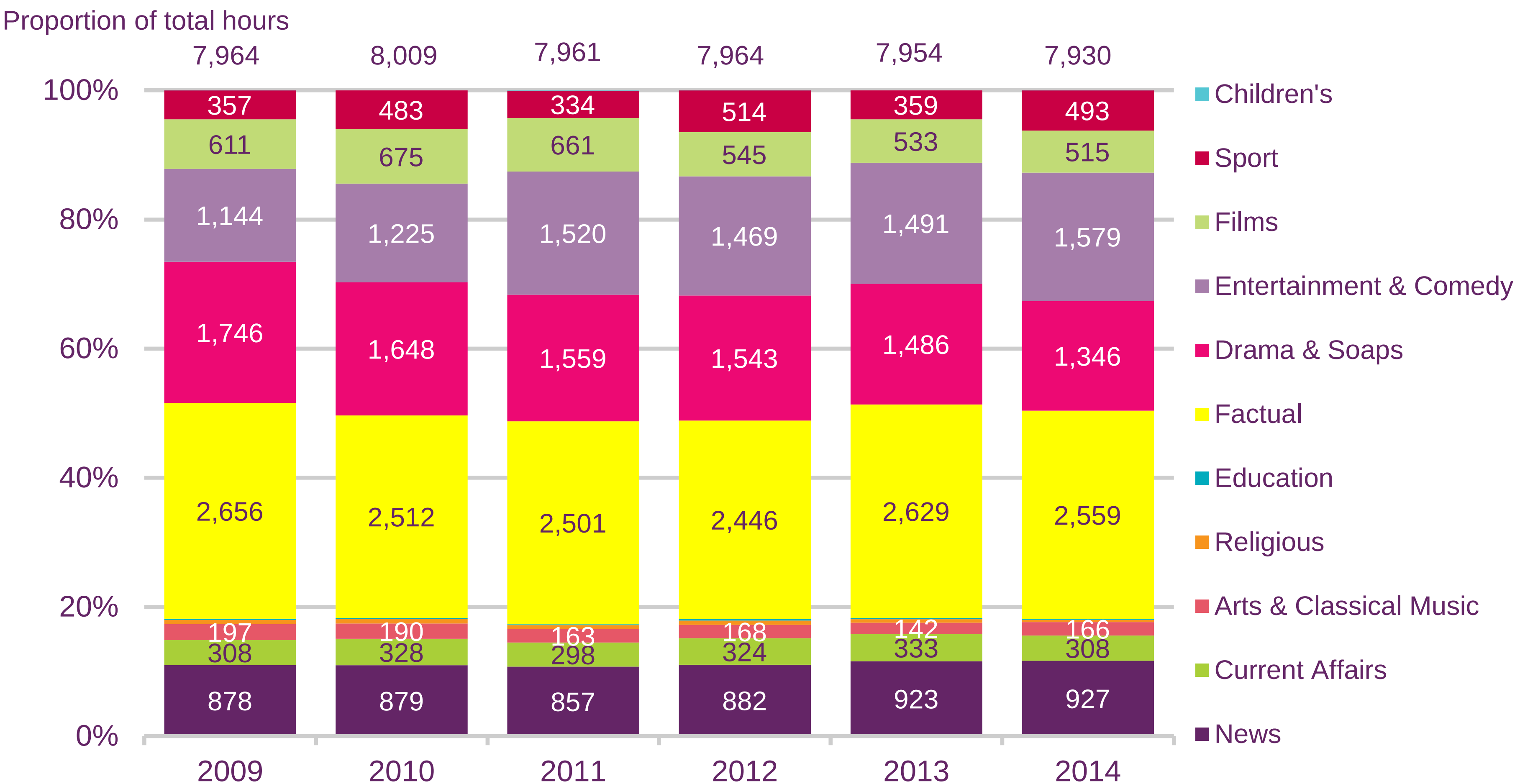
Peak-Time



Source: Ofcom/broadcasters.
Note: Figures do not include nations' and regions' output. BBC portfolio channels include BBC Three, BBC Four, BBC News, BBC Parliament, CBBC and CBeebies

Figure 2.37

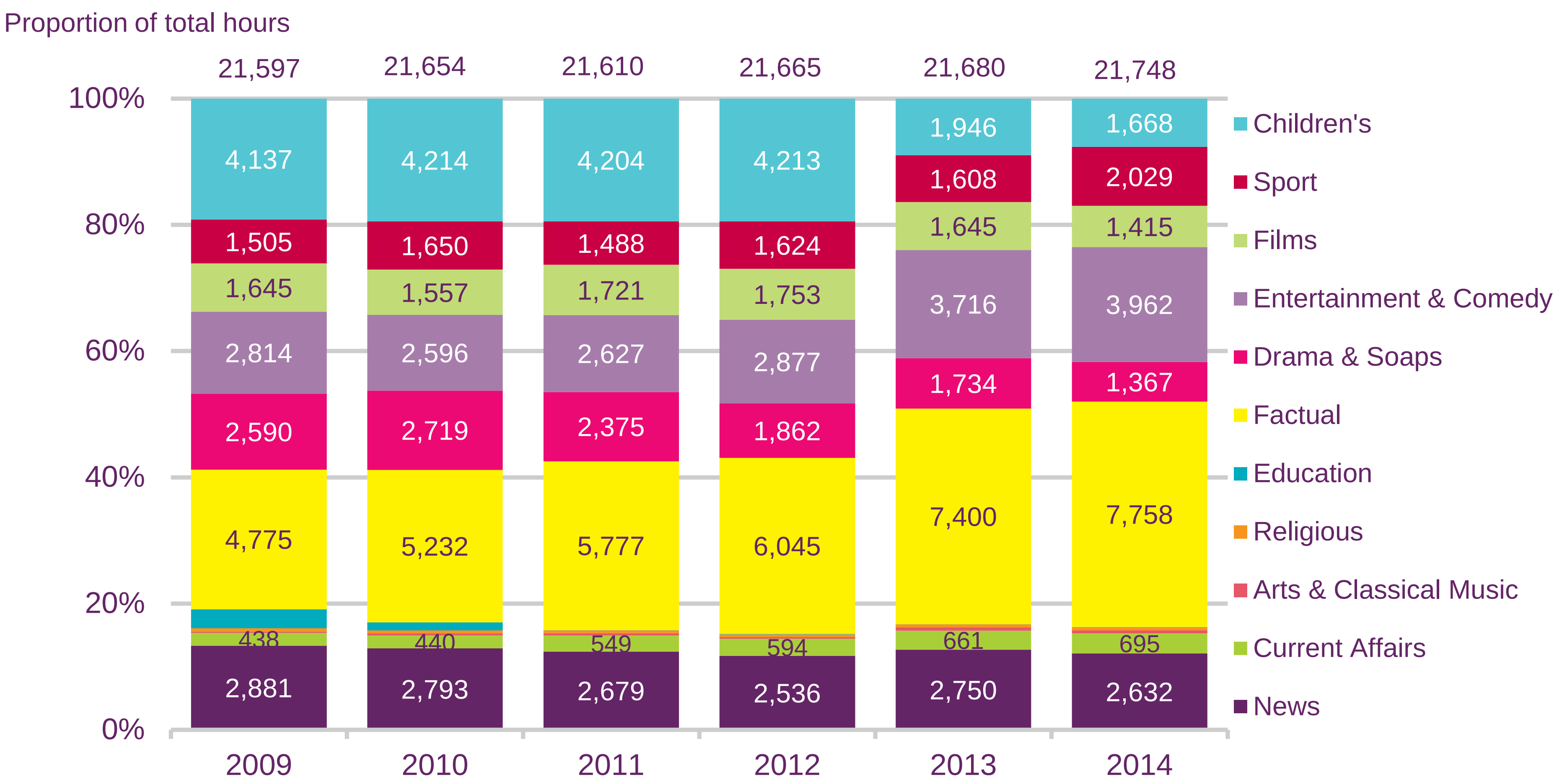
Genre mix on the five main PSB channels: peak time



Source: Ofcom/broadcasters. Note: Includes five main channels including ITV Breakfast, figures do not include hours of nations' and regions' output.

Figure 2.38

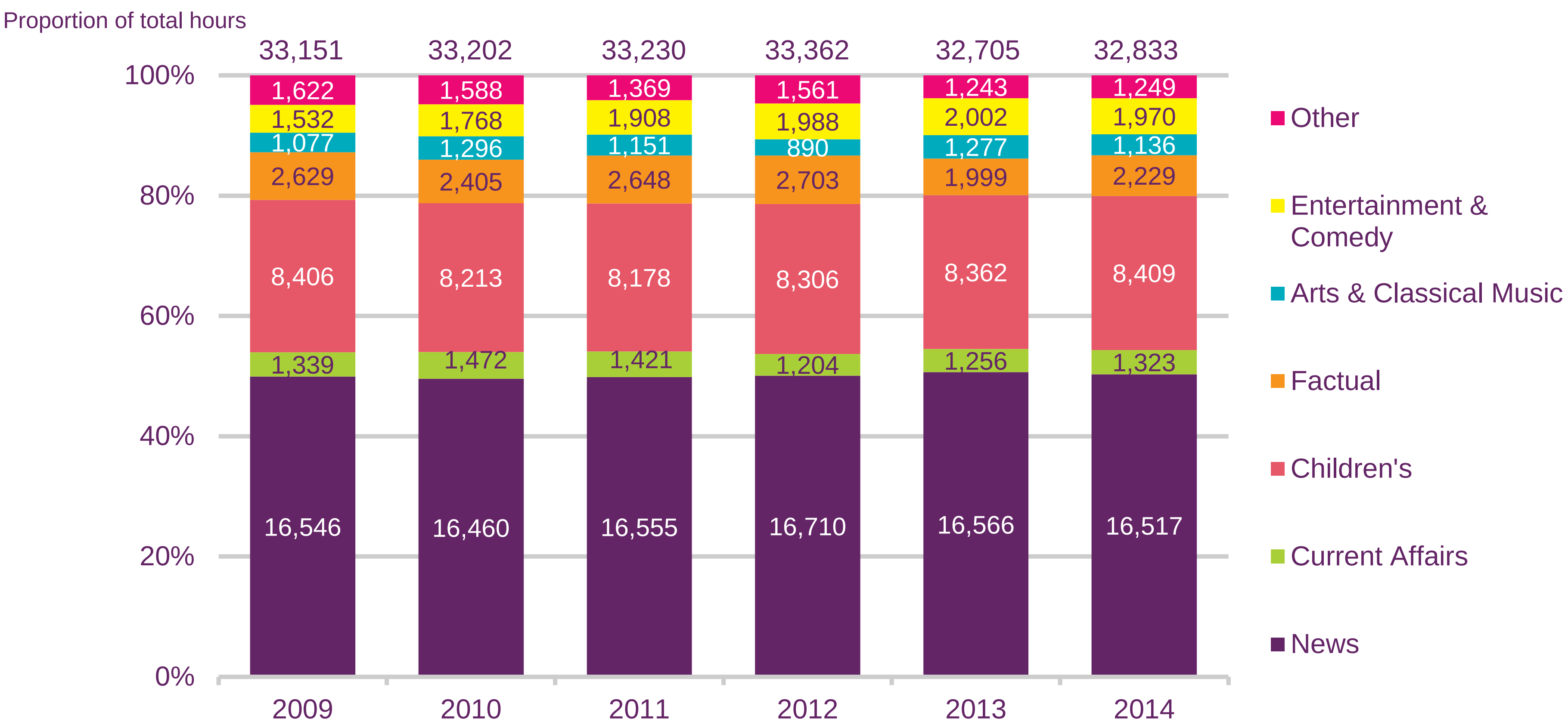
Genre mix on five main PSB channels: daytime



Source: Ofcom/broadcasters. Note: Includes five main channels plus ITV Breakfast. Figures do not include hours of nations' and regions' output.

Figure 2.39

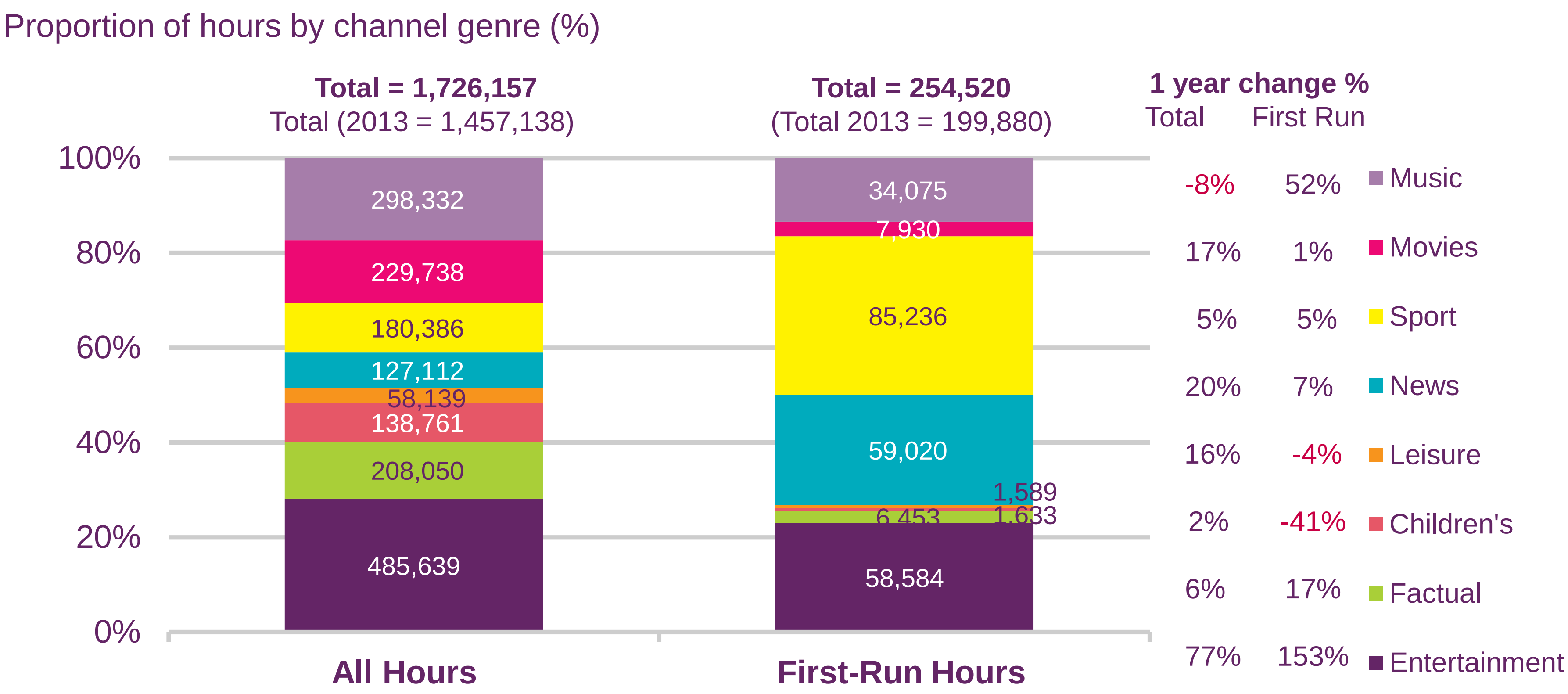
Genre mix on the BBC portfolio channels: all day



Source: Ofcom/broadcasters. All figures are nominal. Note: BBC portfolio channels include BBC Three, BBC Four, BBC News, BBC Parliament, CBBC and CBeebies. Investment figures are nominal. 'Other' includes: education, drama, film, religion and sports

Figure 2.40

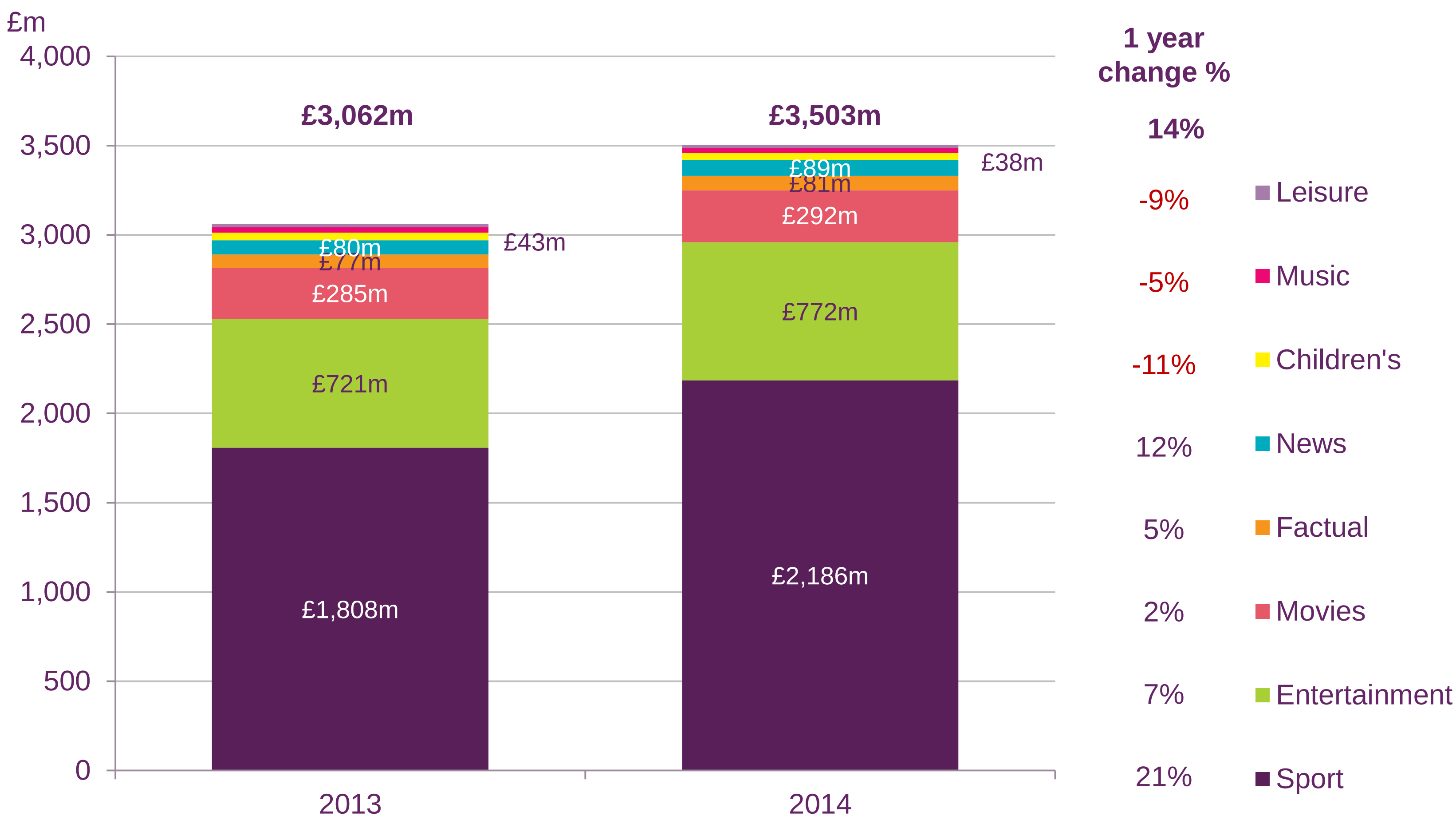
Total multichannel hours and first-run originations/acquisitions: 2014



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

Figure 2.41

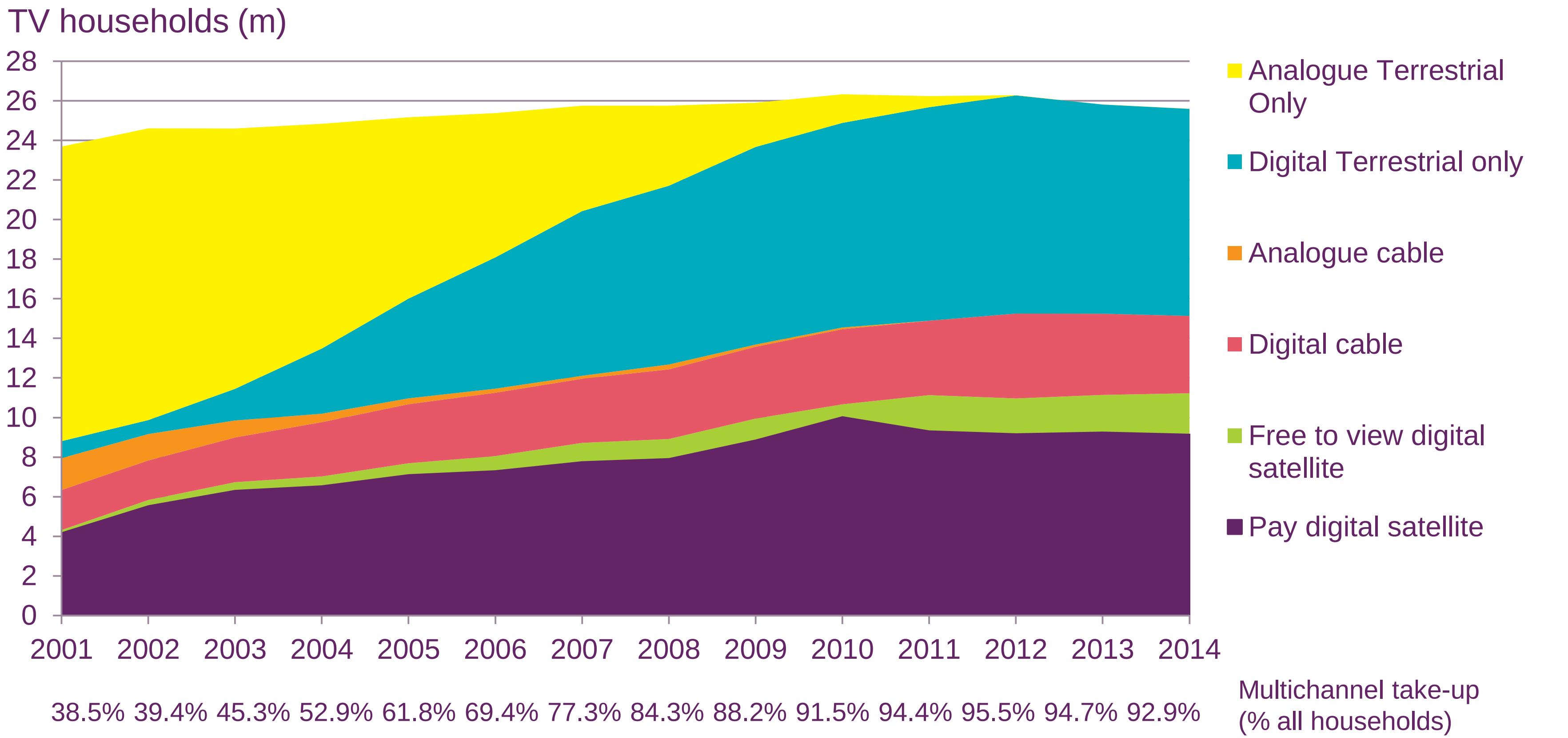
Multichannel content spend in key genres: 2013-2014



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

Figure 2.42

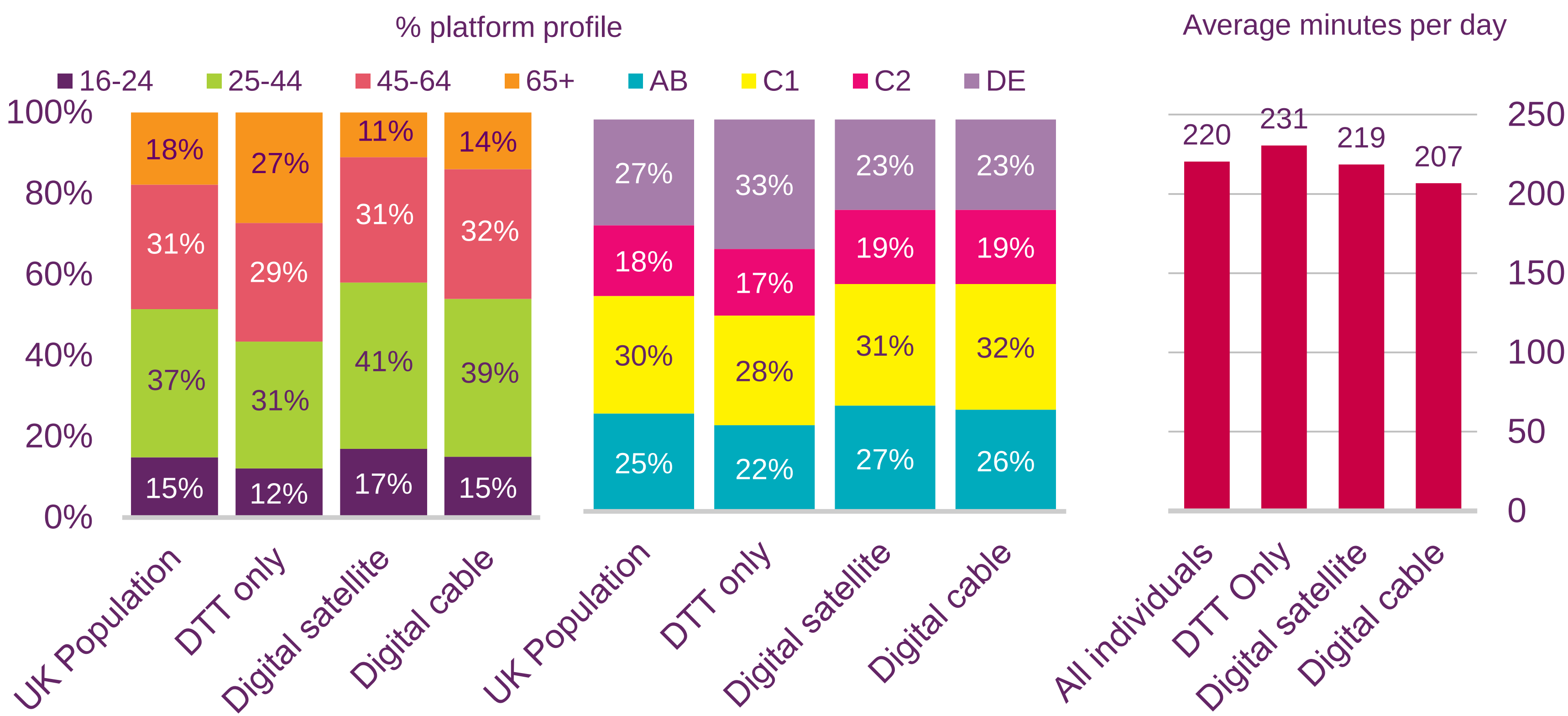
Platform take-up: 2001-2014



Source: BARB Establishment Survey. Note: Data points are based on household level data for Q4 of each year.

Figure 2.43

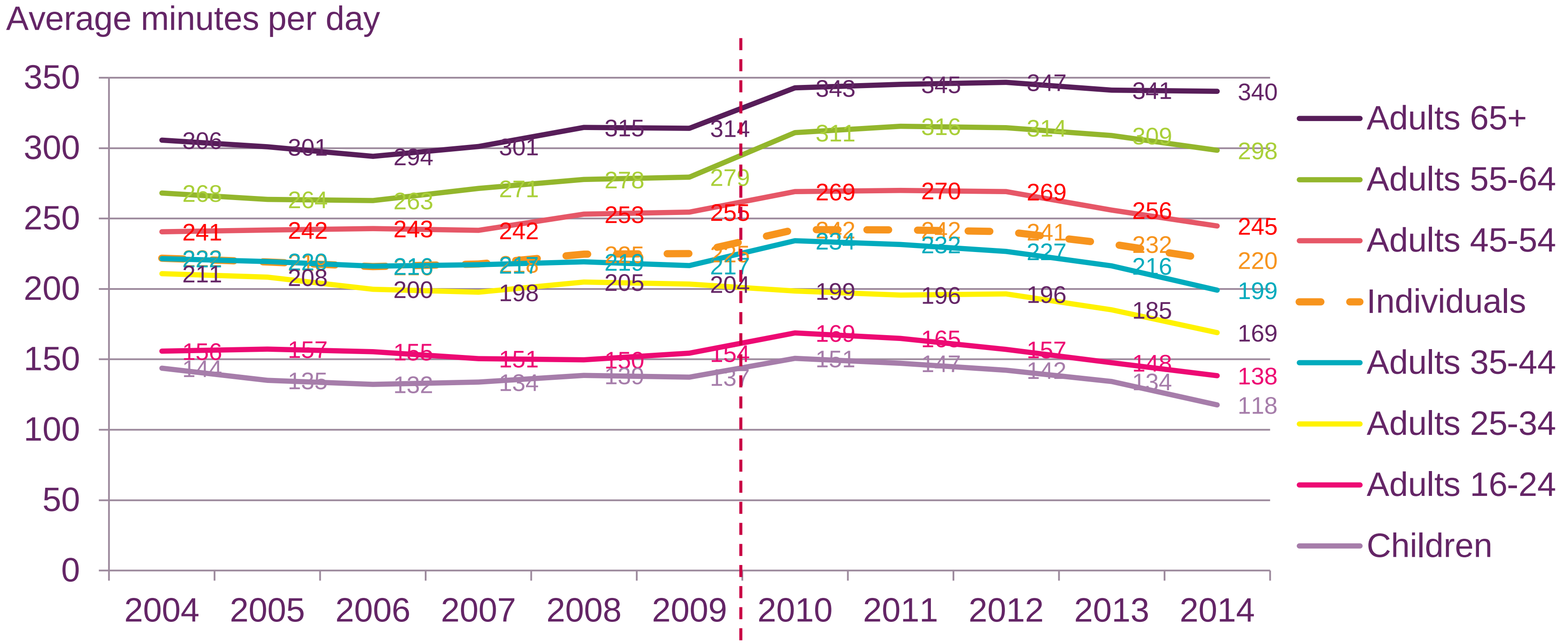
Platform demographics by age, socio-economic group and viewing minutes



Source: Platform profile – Ofcom Technology Tracker 2014. Average minutes - BARB 2014 data

Figure 2.44

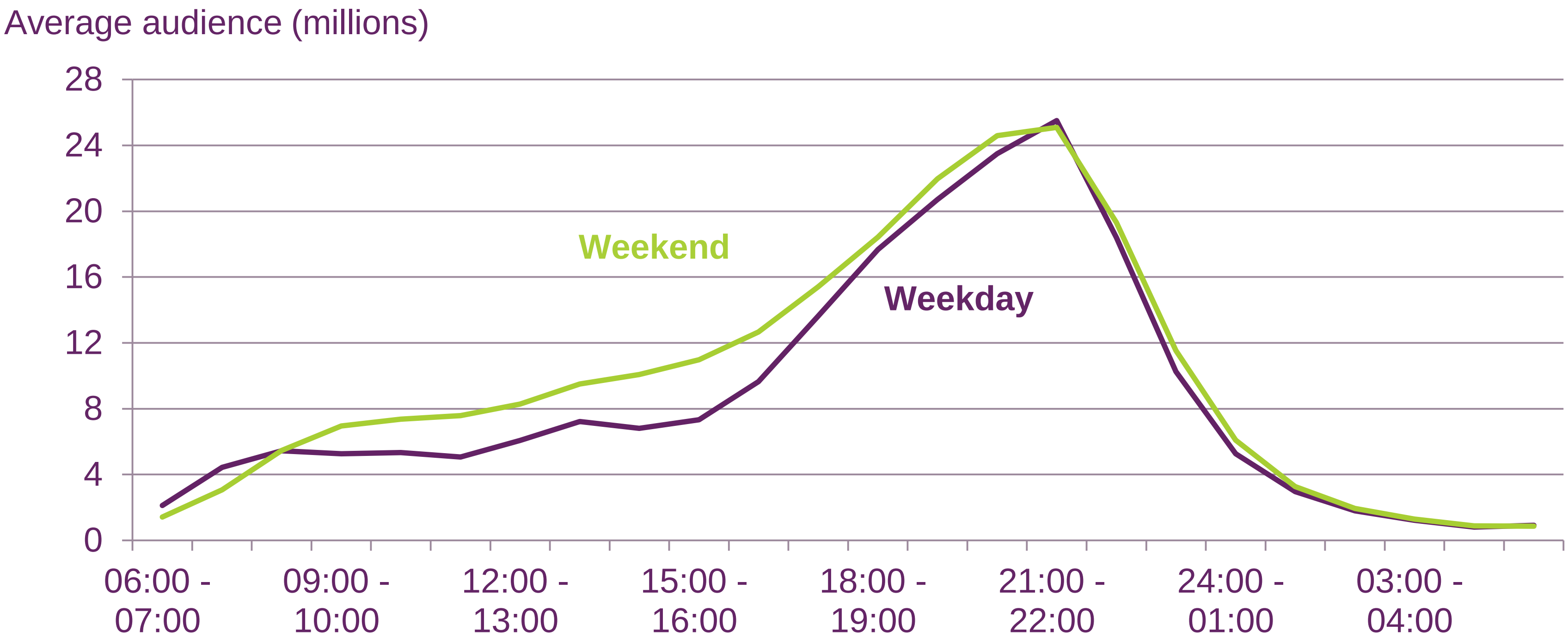
Average minutes of broadcast television viewing per day, by age: all homes



Source: BARB, Network, Individuals 4+. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.45

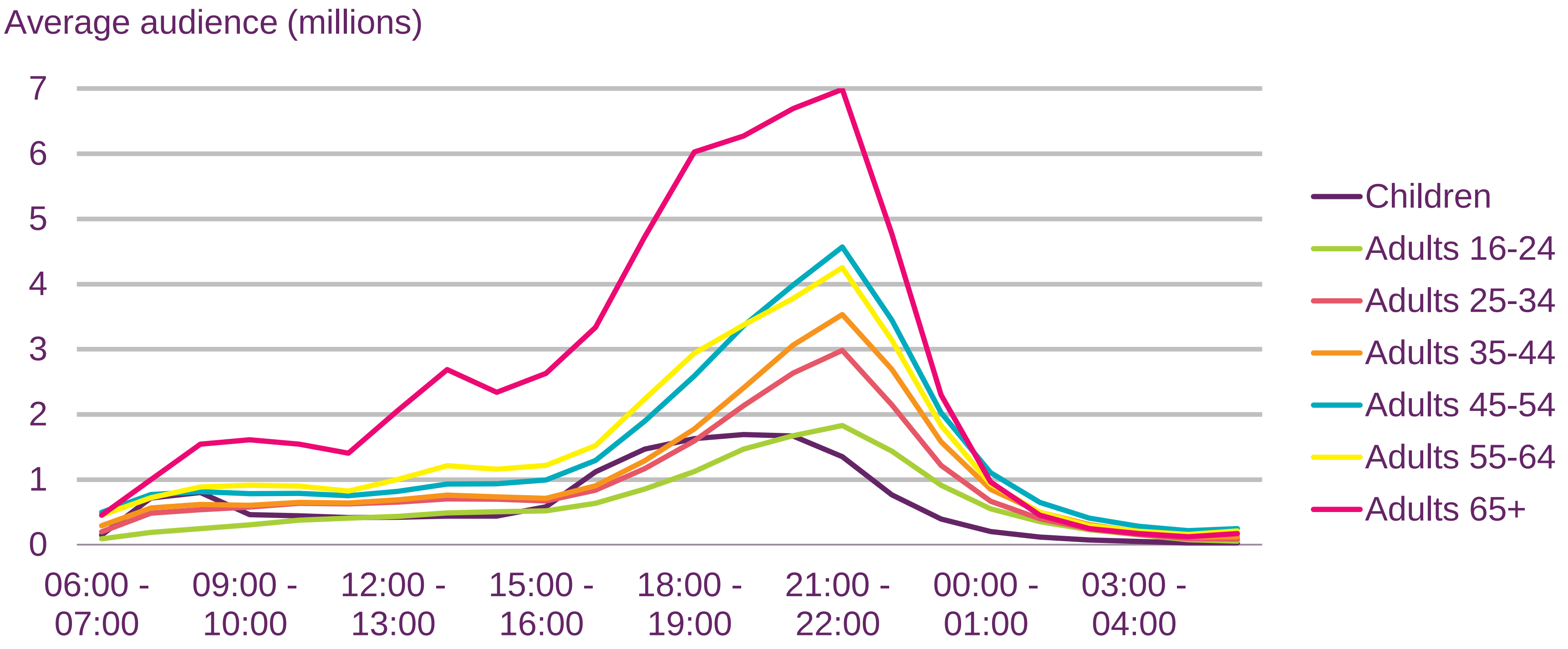
Average 2014 audiences, weekdays/weekends, by day part: all homes



Source: BARB, all individuals 4+

Figure 2.46

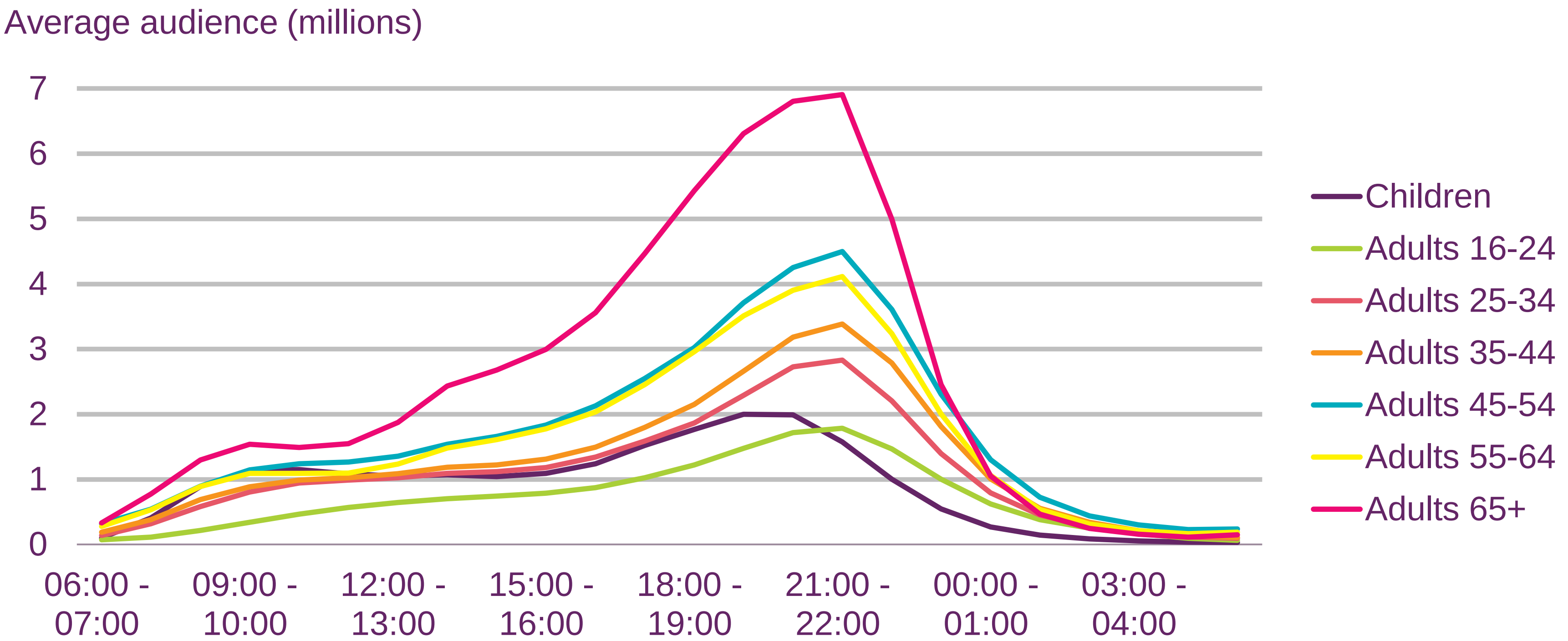
Average 2014 weekday audiences, by day part and age: all homes



Source: BARB, all individuals (4+).

Figure 2.47

Average 2014 weekend audiences, by day part and age: all homes

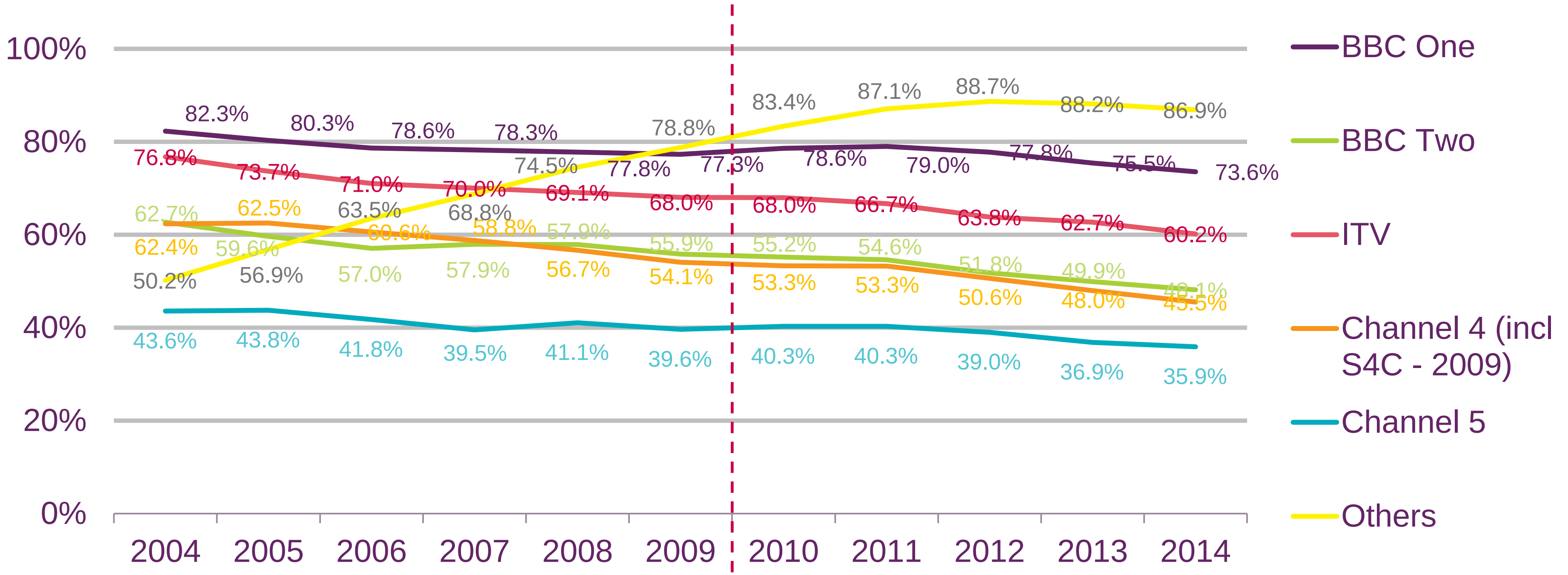


Source: BARB, all individuals 4+

Figure 2.48

Average weekly TV reach in all homes, by channel

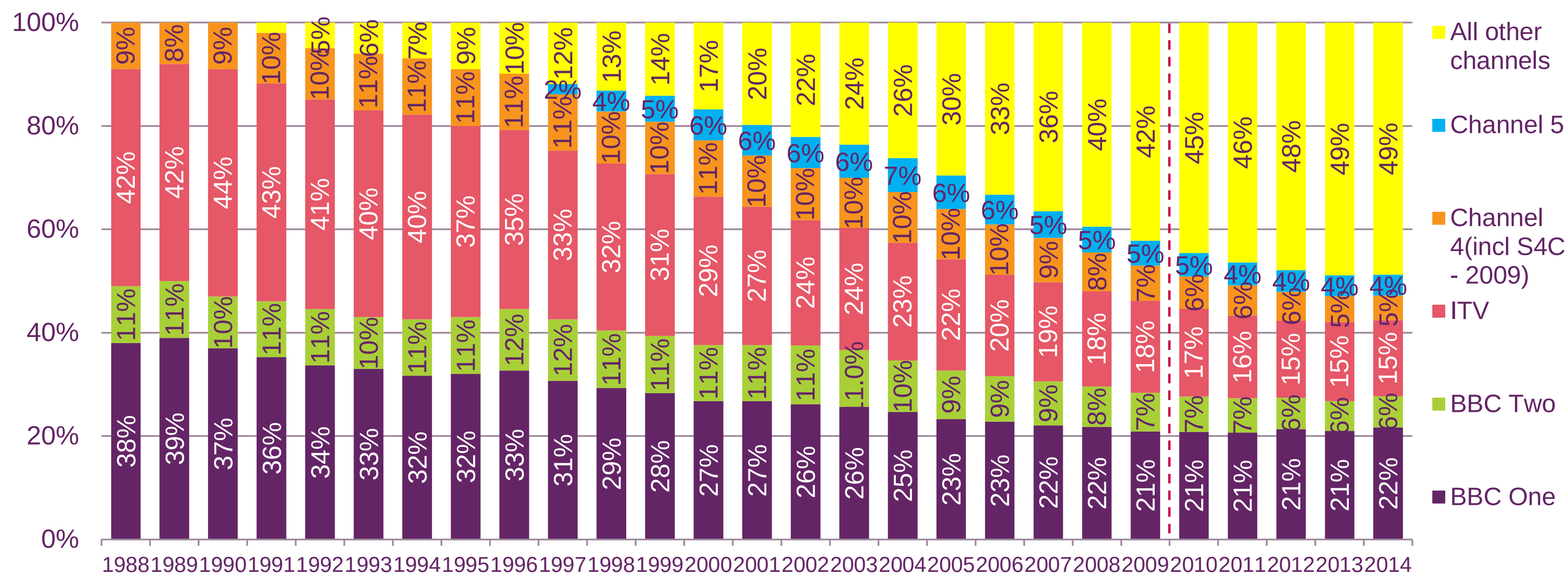
15 minute consecutive weekly reach - full weeks



Source: BARB, all individuals (4+). 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 2014 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 2.49

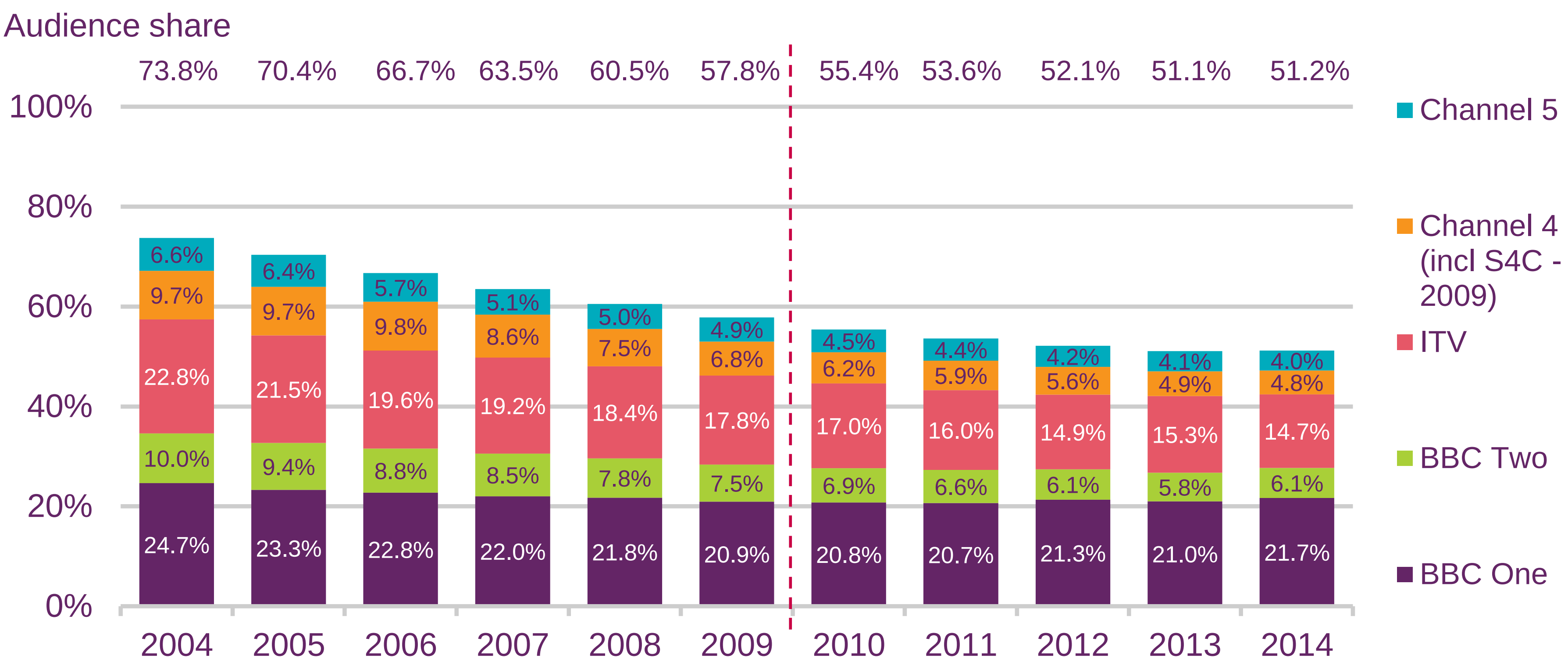
Channel shares in all homes: 1988 to 2014



Source: BARB, TAM JICTAR and Ofcom estimates. All individuals (4+)
Notes: 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); 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 share in 2014 was 0.1% (all homes); the main five PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Figure 2.50

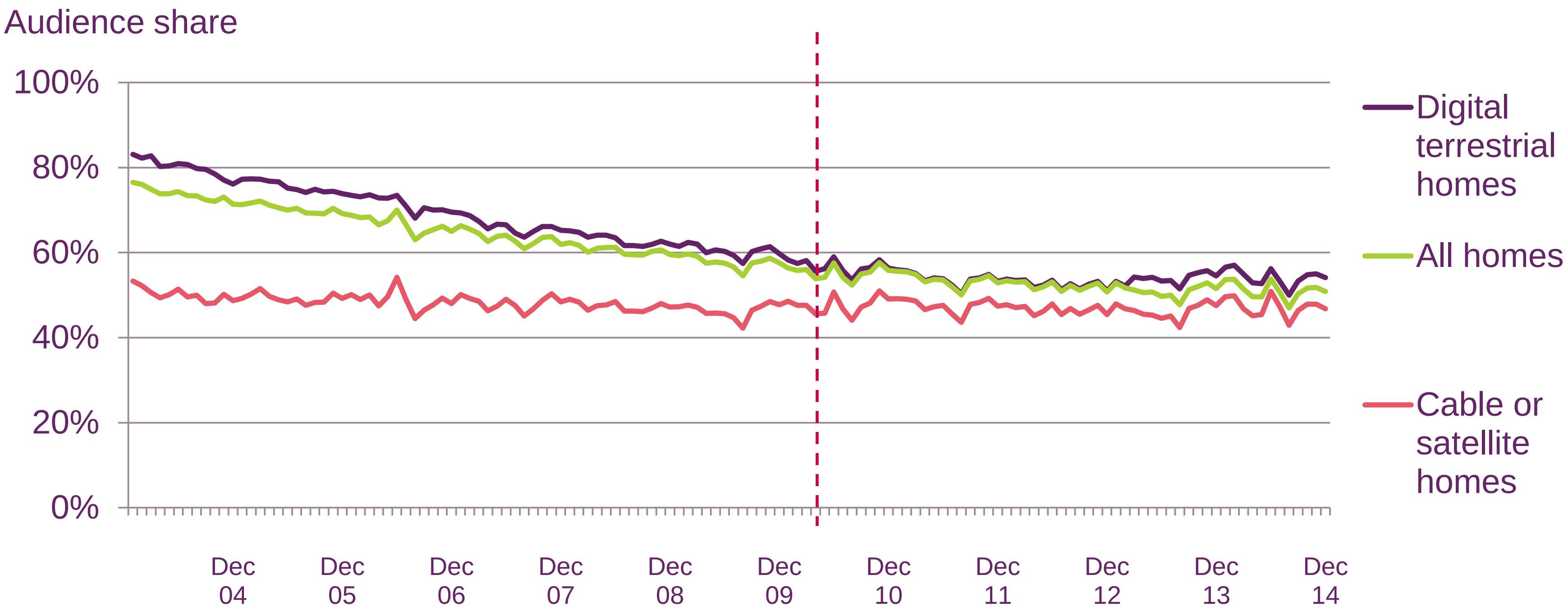
Main five PSB channels' audience share, all homes



Source: BARB. 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 2014 channel share = 0.1%. The five main PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Figure 2.51

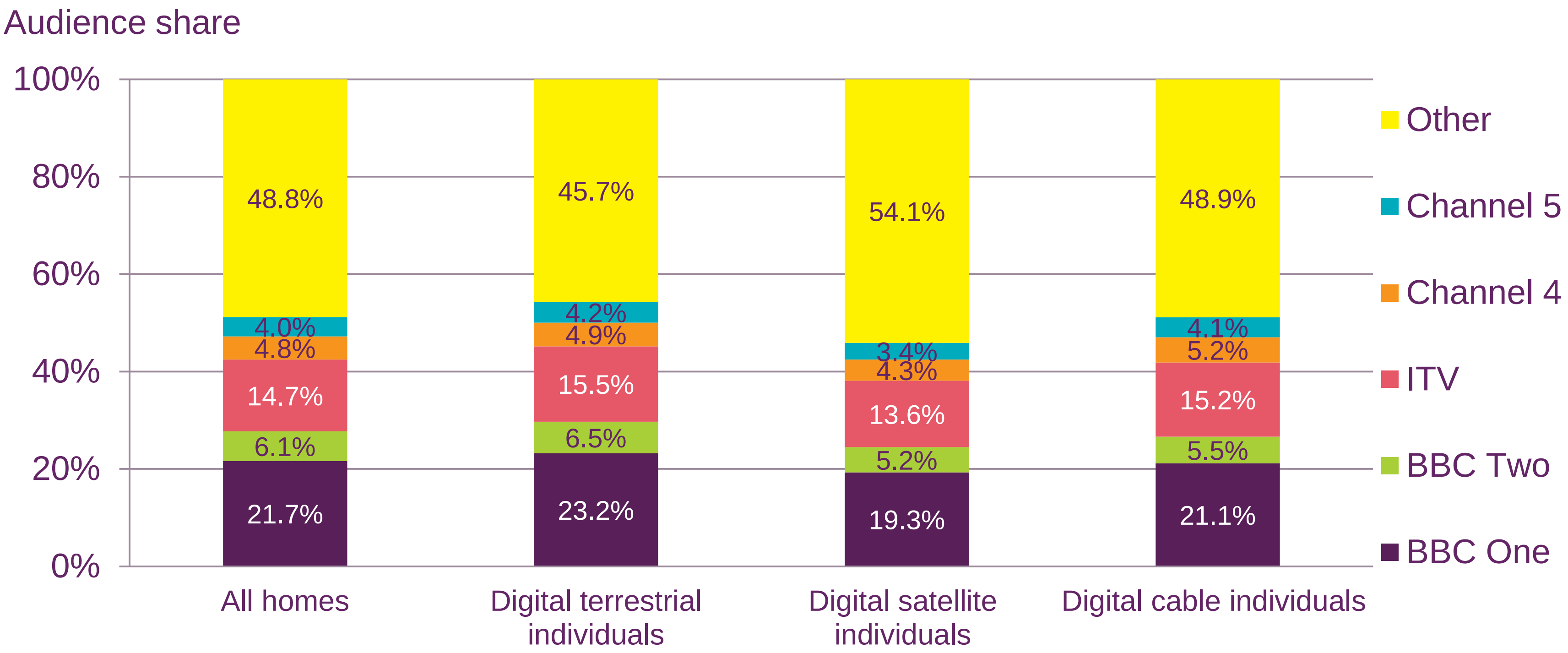
Main five PSB channels' audience share, by platform



Source: BARB, individuals (4+) in platform homes, based on share %. 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 2014 channel share = 0.1%. The five main PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Figure 2.52

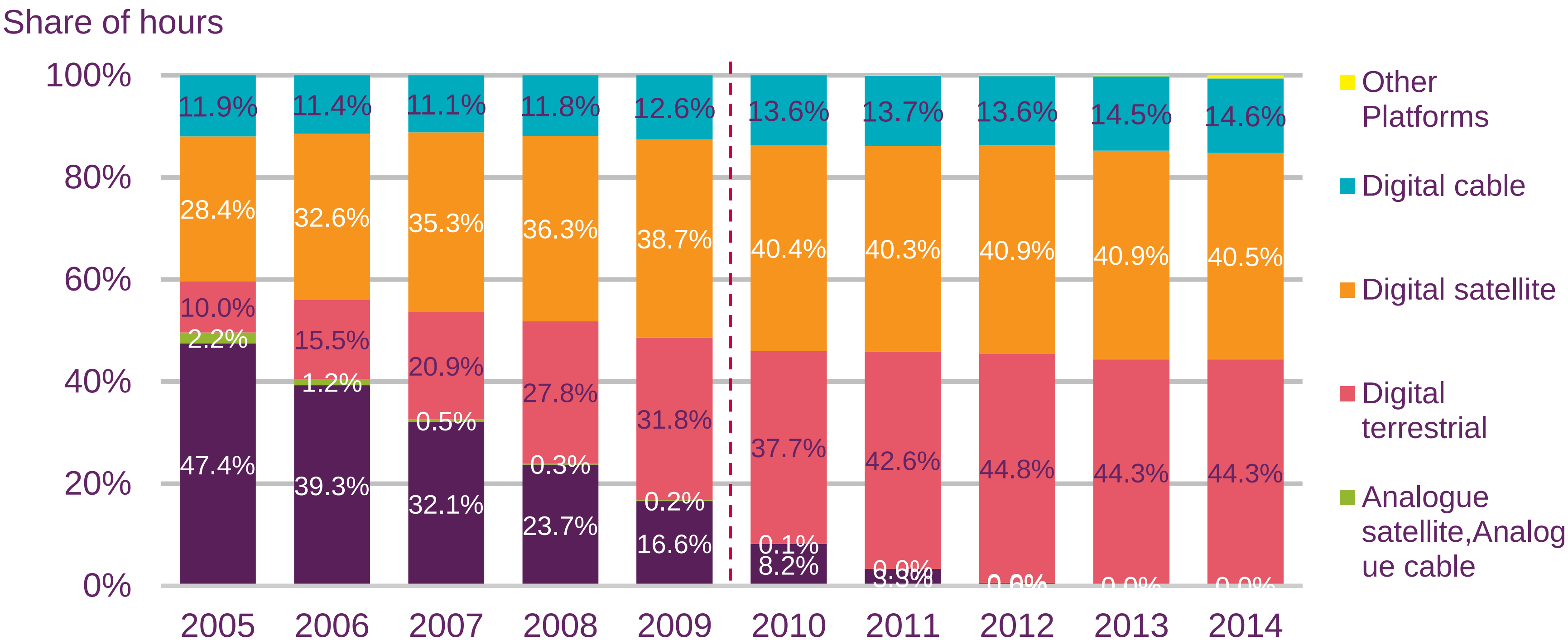
Channel share, by platform: 2014



Source: BARB. Individuals (4+) in platform homes, based on share%. The five main PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Figure 2.53

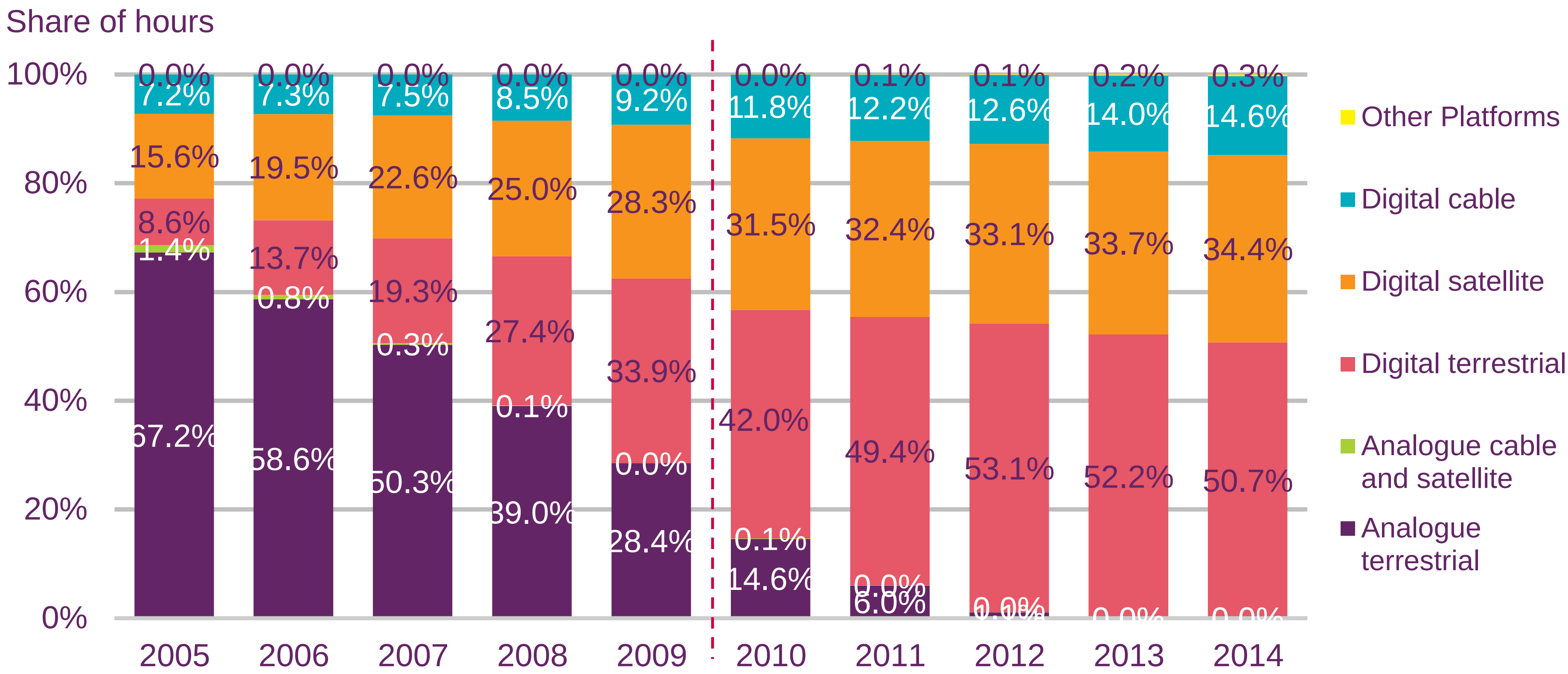
Proportion of total TV viewing hours, by platform signal



Source: BARB, individuals 4+, all homes, total hours. Based on viewing through the reception mode present in home as a proportion of all viewing through all platforms on all TV sets in home. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.54

Proportion of main five PSB channels' viewing hours by platform signal



Source: BARB, all individuals, total hours. Based on viewing through the reception mode present in home as a proportion of all viewing through all platforms through all TV sets in home. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

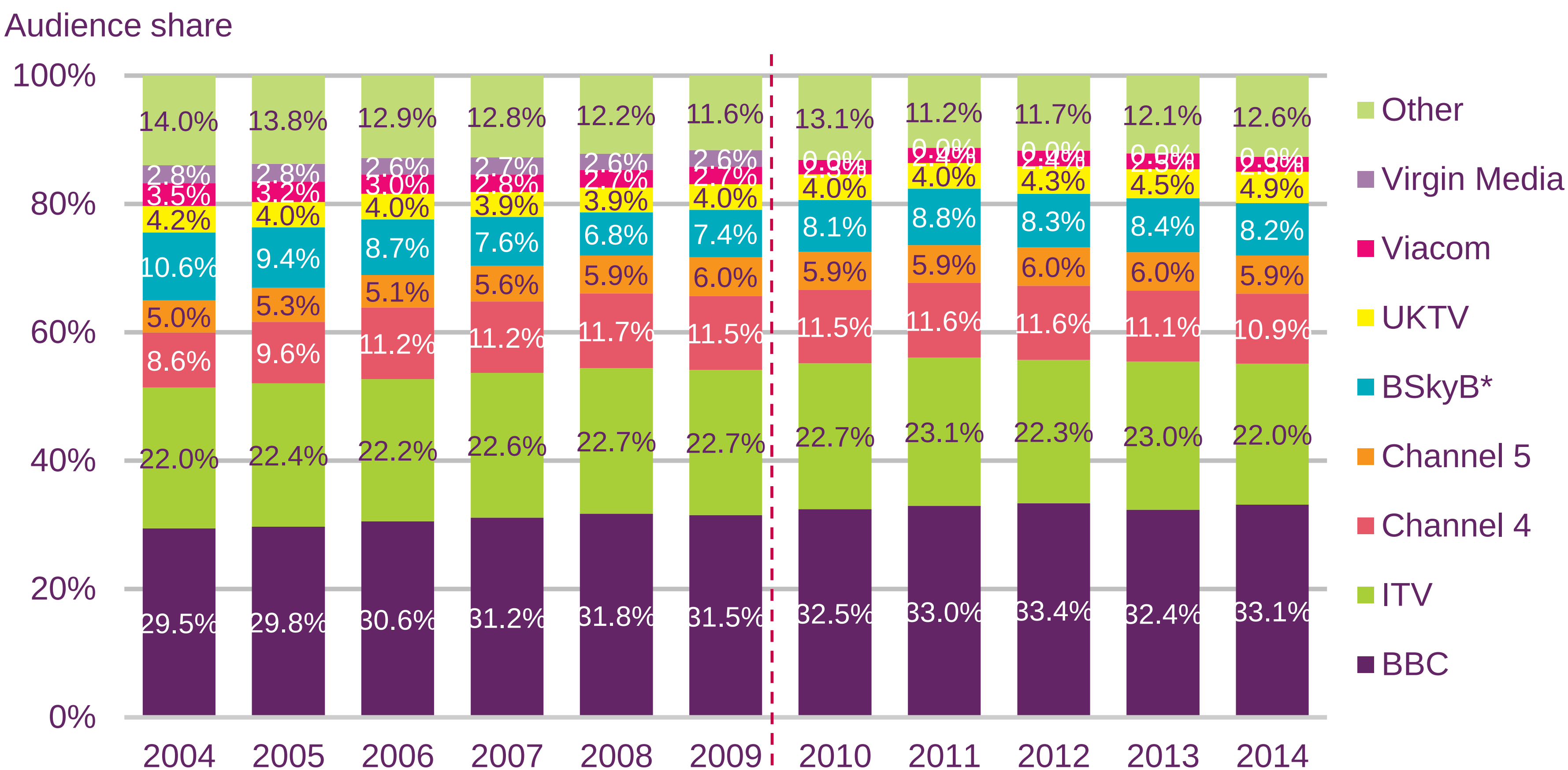
Figure 2.55

Main five PSB, PSB portfolio, and other channels' shares in multichannel homes

Source: BARB. 2004-2009: All individuals, multichannel network. 2010 - 2012: Individuals in multichannel homes, Network. 2013+: All individuals, Network. Following digital switchover in 2012, from 2013 onwards all homes are multichannel homes. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. The main five PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Figure 2.56

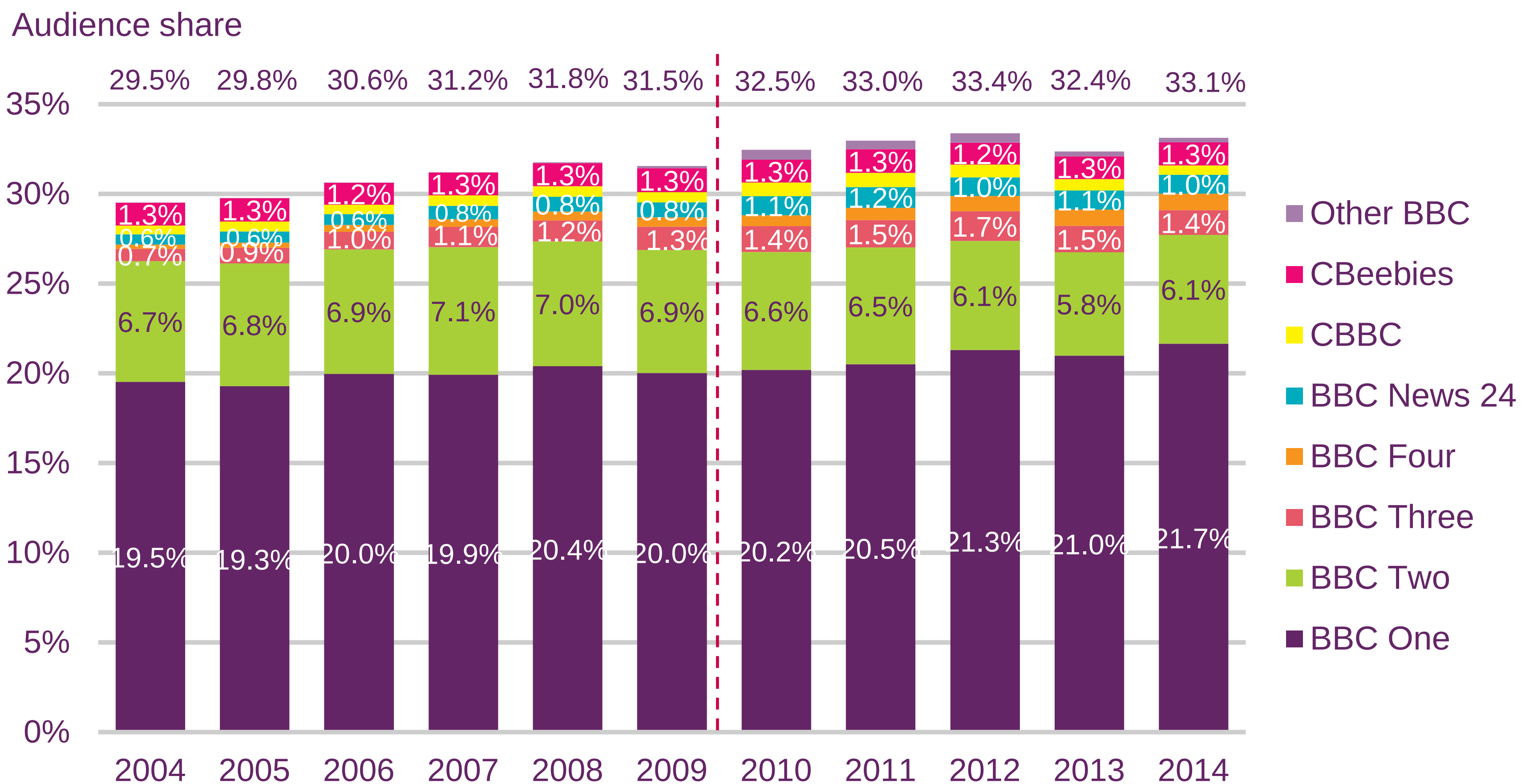
Broadcaster family shares in multichannel homes



Source: BARB. 2004-2009: All individuals, multichannel network. 2010 - 2012: Individuals in multichannel homes, network. 2013+: All individuals, network. Following digital switchover in 2012, from 2013 onwards all homes are multichannel homes. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. BSkyB took ownership of VMTV in June 2010, Virgin Media TV portfolio shares are included in the BSkyB figure for the whole of 2010. ITV includes all ITV network channels, not just those owned by ITV plc.

Figure 2.57

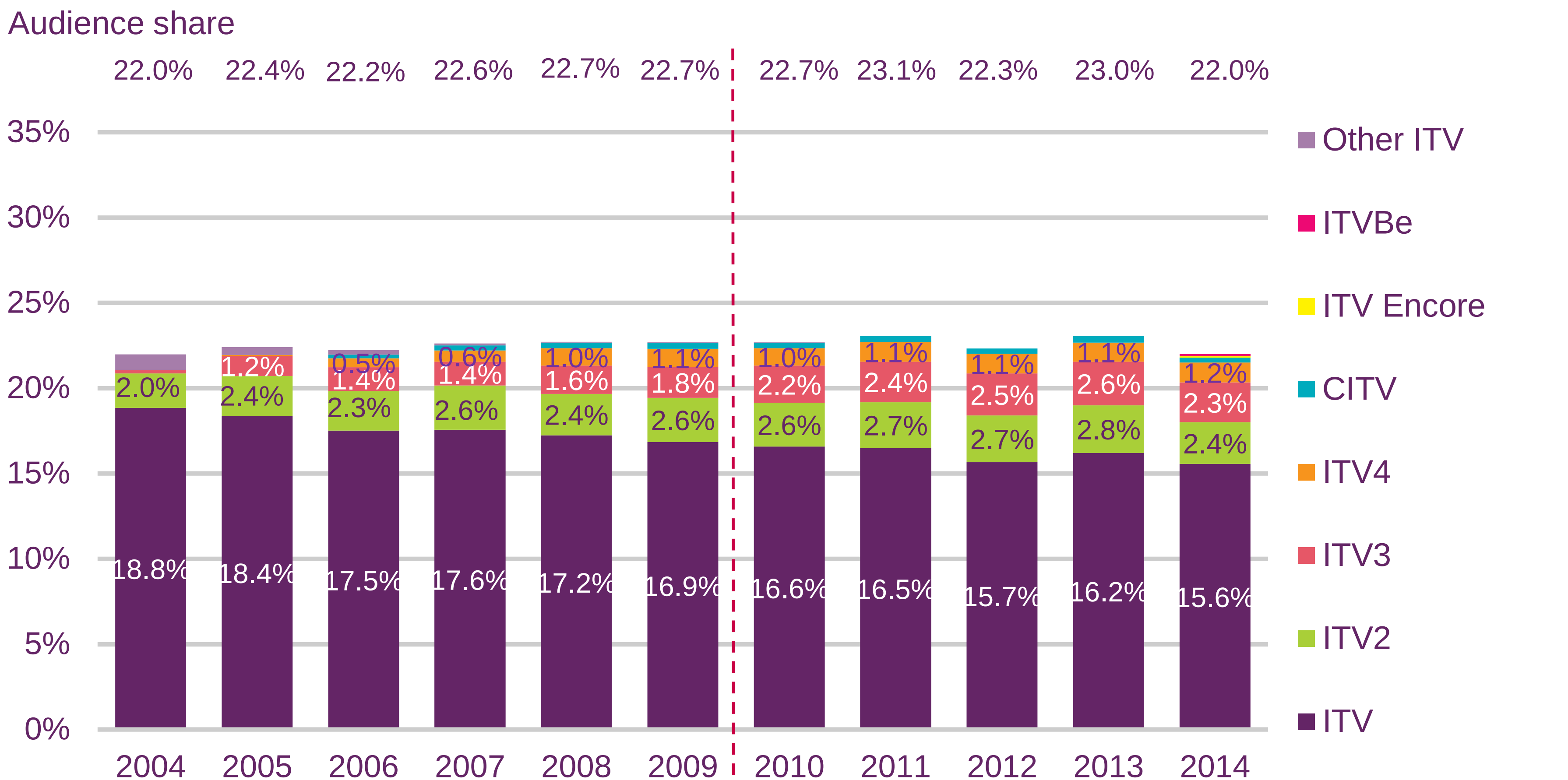
BBC family shares in multichannel homes



Source: BARB. 2004-2009: All individuals, multichannel Network. 2010 - 2012: individuals in multichannel homes, network. 2013+: All Individuals, Network. Following digital switchover in 2012, from 2013 onwards all homes are multichannel homes. Source: BARB. Note: 'Other' includes BBC Parliament, BBC red button channels, BBC Olympics channels in 2012, BBC Choice, BBC HD and BBC Knowledge. The 24 BBC Olympics channels accounted for 0.21% share in 2012 . A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. HD and SD viewing included

Figure 2.58

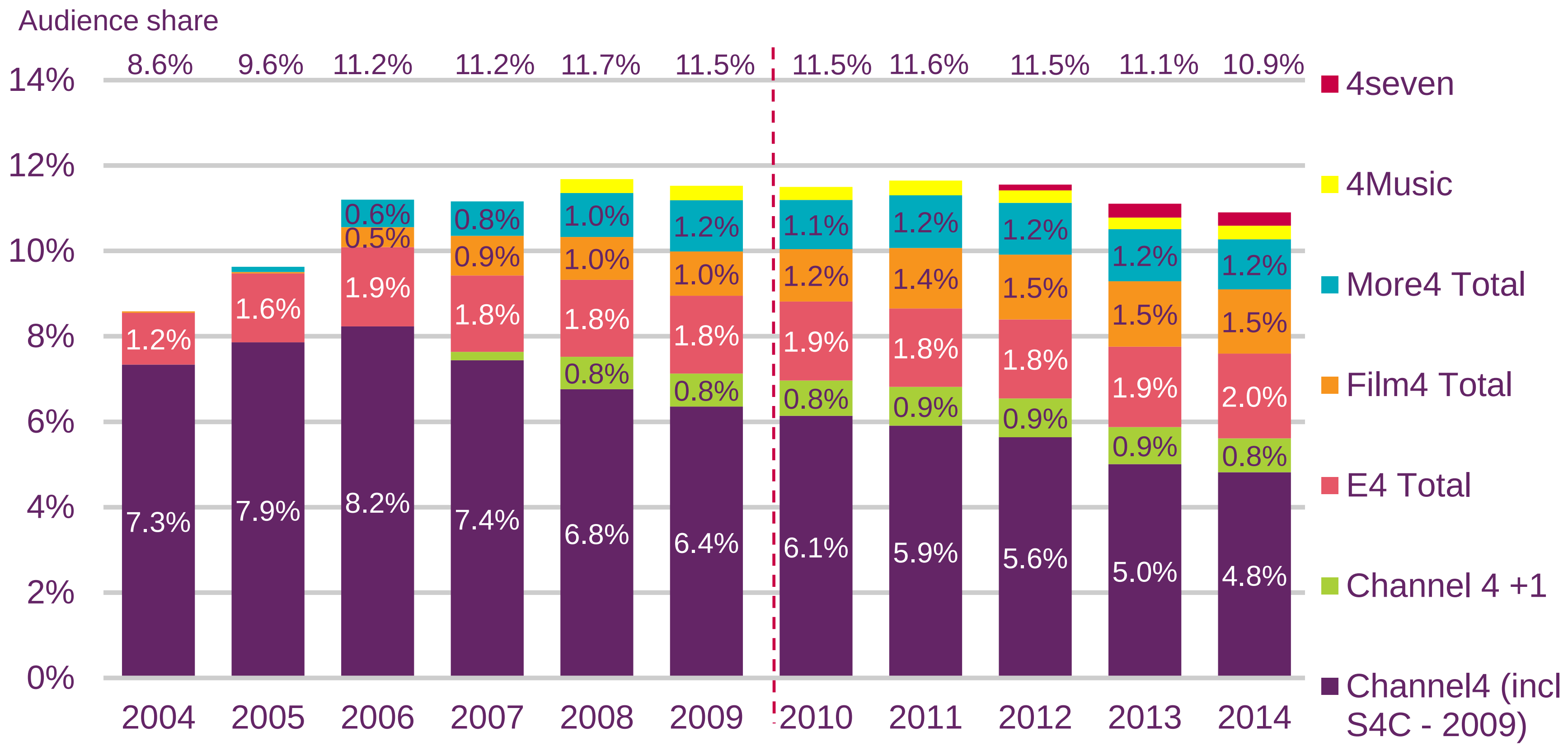
ITV family shares in multichannel homes



Source: BARB. 2004-2009: All individuals, multichannel network. 2010 - 2012: Individuals in multichannel homes, network. 2013+: All Individuals, network. Following digital switchover in 2012, from 2013 onwards all homes are multichannel homes. Note: ITV, ITV2, ITV3 and ITV4 **include** their +1 services. HD variants are included with all channels where applicable. 'Other' includes (when relevant) ITV Play, ITV News, Men & Motors and Plus. ITV Encore and +1 commenced reporting 09.06.14, ITVBe started reporting 08.10.14 and ITVBe+1 on 19.11.14. 14 Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.59

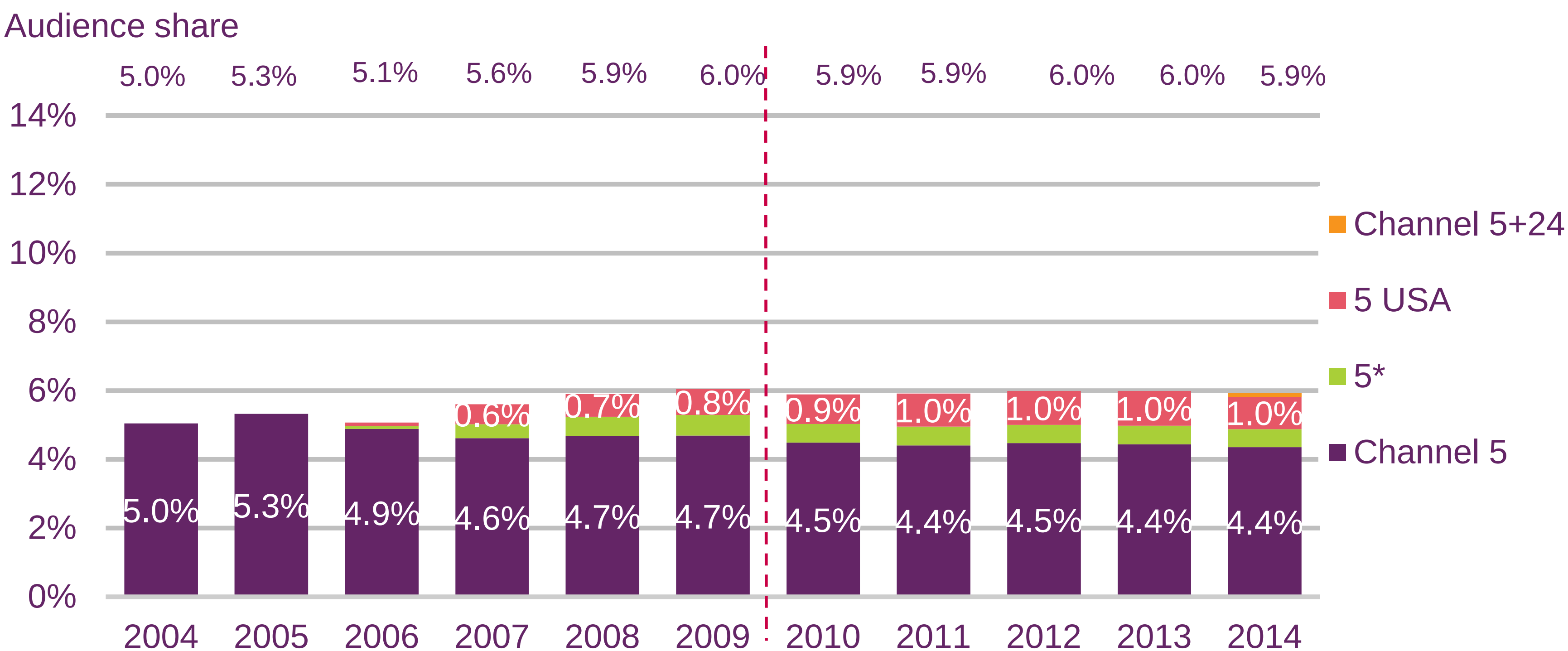
Channel 4 family shares in multichannel homes



Source: BARB. 2004-2009: All individuals, multichannel network. 2010 - 2012: individuals in multichannel homes, network. 2013+: All individuals, network. Following digital switchover in 2012, from 2013 onwards all homes are multichannel homes. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. E4, More4 and Film 4 respective +1 channel shares are included. 4Seven launched 4[t]July 2012. 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 2014 channel share = 0.1%. HD and SD viewing included.

Figure 2.60

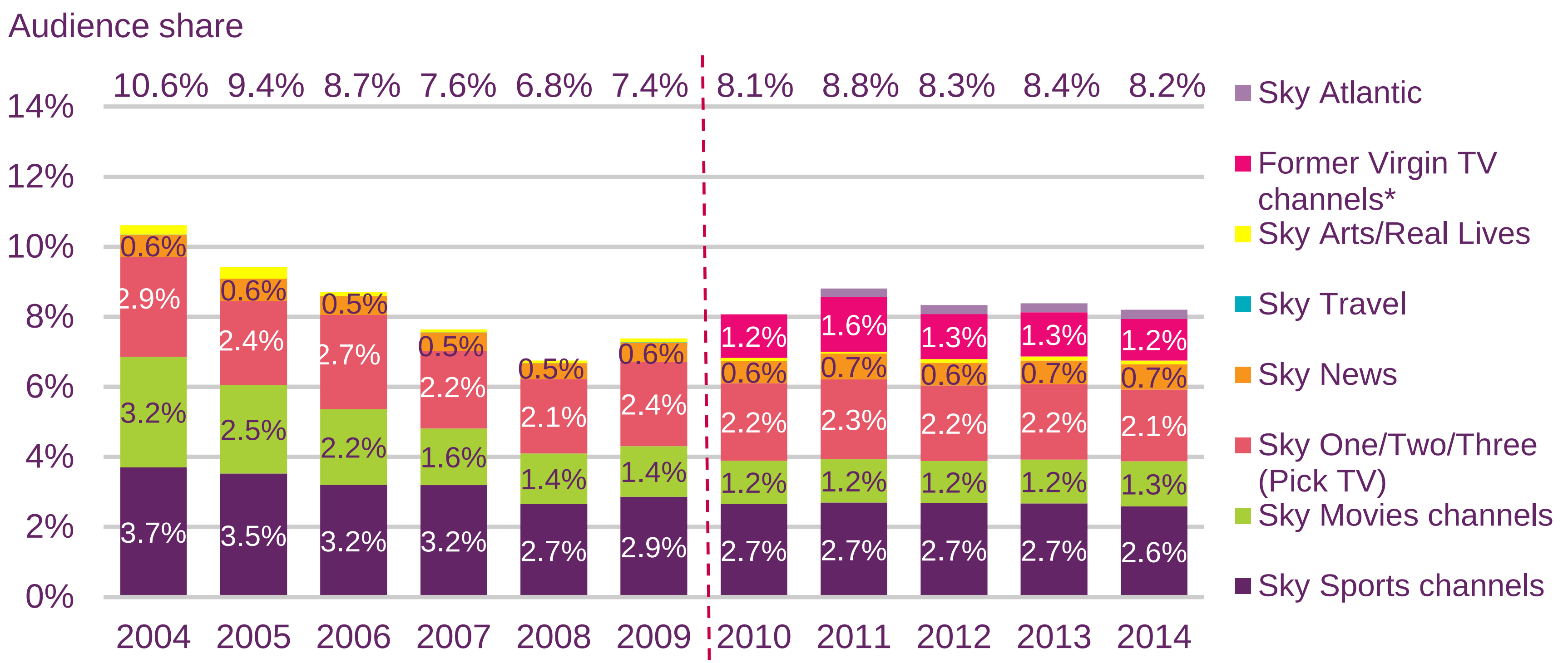
Channel 5 family shares in multichannel homes



Source: BARB. 2004-2009: All individuals, multichannel network. 2010-2012: individuals in multichannel homes, network. 2013+: All individuals, network. Following digital switchover in 2012, from 2013 onwards all homes are multichannel homes. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Channel 5+24 launched 4 February 2014. Channels include their +1 service and HD viewing shares.

Figure 2.61

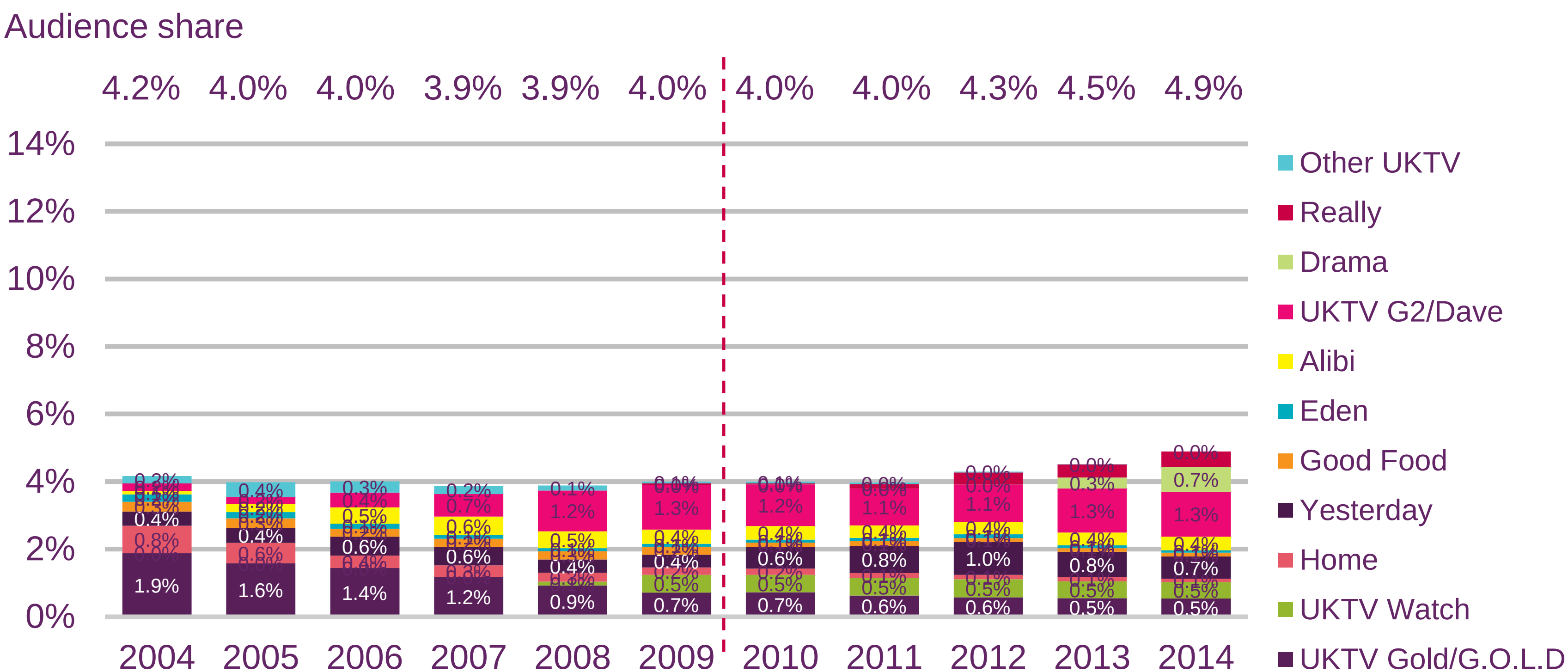
Sky family shares in multichannel homes



Source: BARB. 2004-2009: All individuals, multichannel network. 2010 - 2012: individuals in multichannel homes, network. 2013+: All individuals, network. Following digital switchover in 2012, from 2013 onwards all homes are multichannel homes. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. *BSkyB took ownership of VMTV in June 2010, Virgin Media TV portfolio shares are included in the BSkyB figure for the whole of 2010 onwards. HD and SD viewing included.

Figure 2.62

UKTV family shares in multichannel homes



Source: BARB. 2004-2009: All individuals, multichannel network. 2010 - 2012: individuals in multichannel homes, network. 2013+: All individuals, Network. Following digital switchover in 2012, from 2013 onwards all homes are multichannel homes. Note: In 2008 figures, new channel names and shares have been matched to old channels. Dave went live in Oct 2007. Drama launched in July 2013 and is included in 'Other' Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. HD and SD viewing included.

Figure 2.63

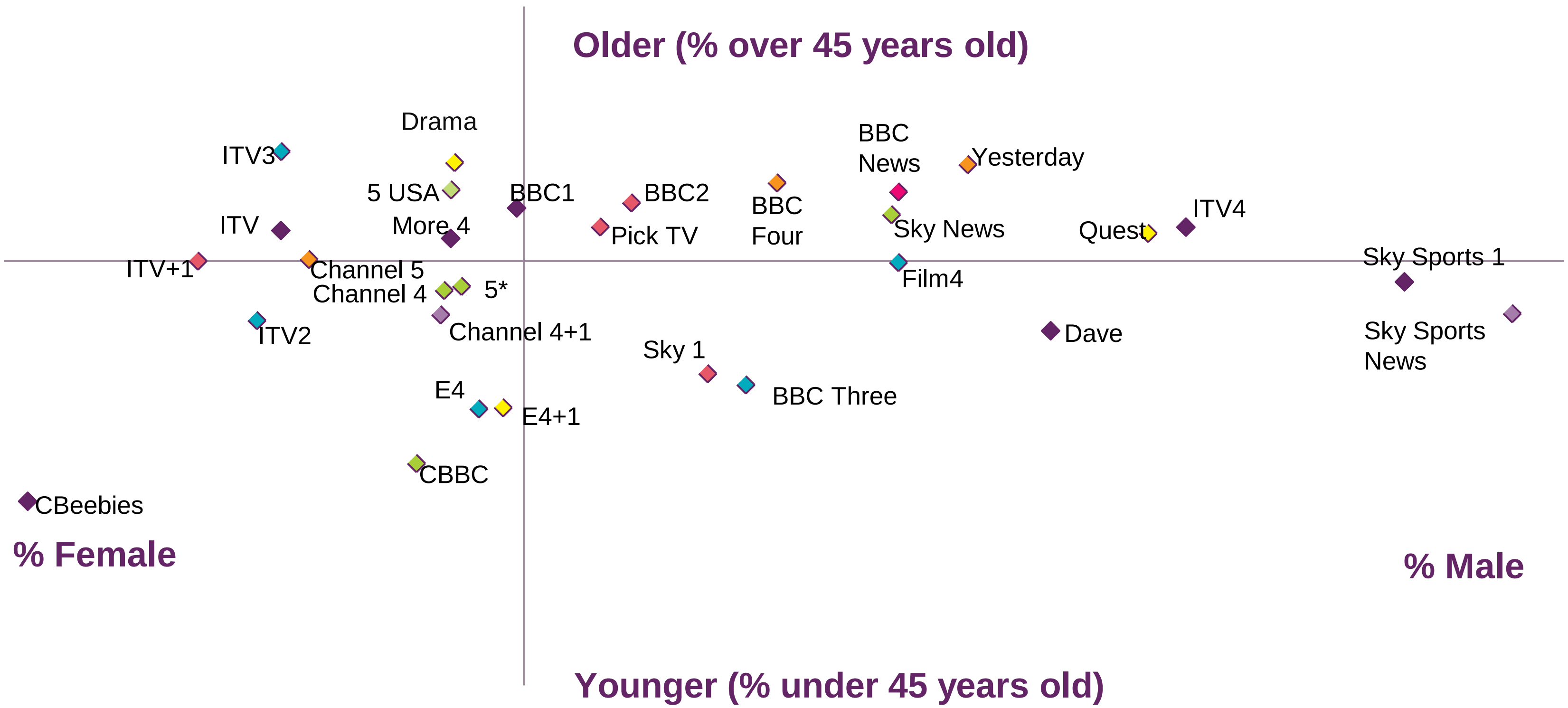
Top channels by share, all homes: 2013-2014

	Share	Rank			Share	Rank	
Channel	2014	2014	2013	Channel	2014	2014	2013
BBC One	21.7%	1	1	Dave	1.2%	11	12
ITV	14.7%	2	2	Film4	1.2%	12	10
BBC Two	6.1%	3	3	ITV4	1.1%	13	16
Channel 4	4.8%	4	4	BBC News	1.0%	14	15
Channel 5	4.0%	5	5	More4	1.0%	15	14
ITV3	2.1%	6	6	Sky Sports 1	1.0%	16	13
ITV2	1.9%	7	7	Sky 1	1.0%	17	18
E4	1.4%	8	9	BBC4	0.9%	18	19
BBC Three	1.4%	9	8	5 USA	0.9%	19	20
CBeebies	1.3%	10	11	ITV +1	0.8%	20	21

Source: BARB. individuals 4+
Note: Includes viewing to HD variants but excludes viewing to channels' +1 services

Figure 2.64

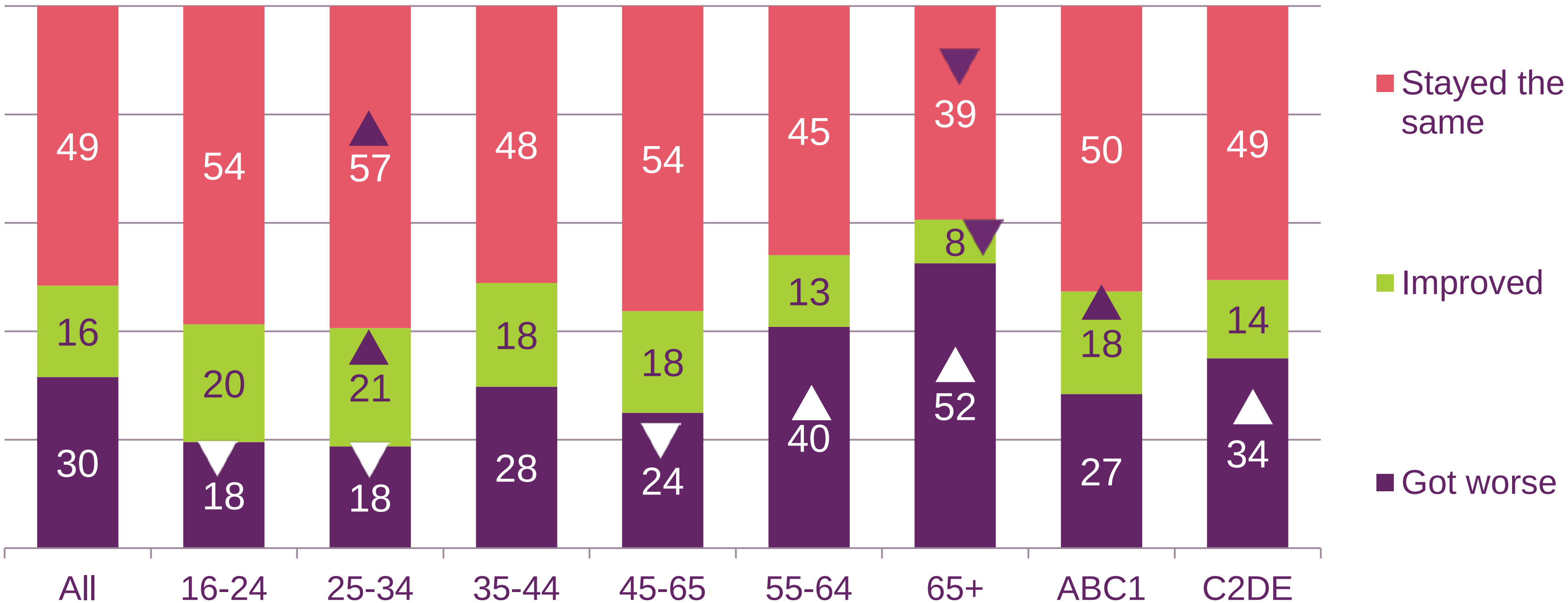
Age and gender profile of the 30 most-viewed channels, all homes: 2014



Source: BARB Note: The profile of a channel is calculated relative to the television population in all homes. Includes viewing to HD variants but excludes viewing to channels' +1 services

Figure 2.65

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

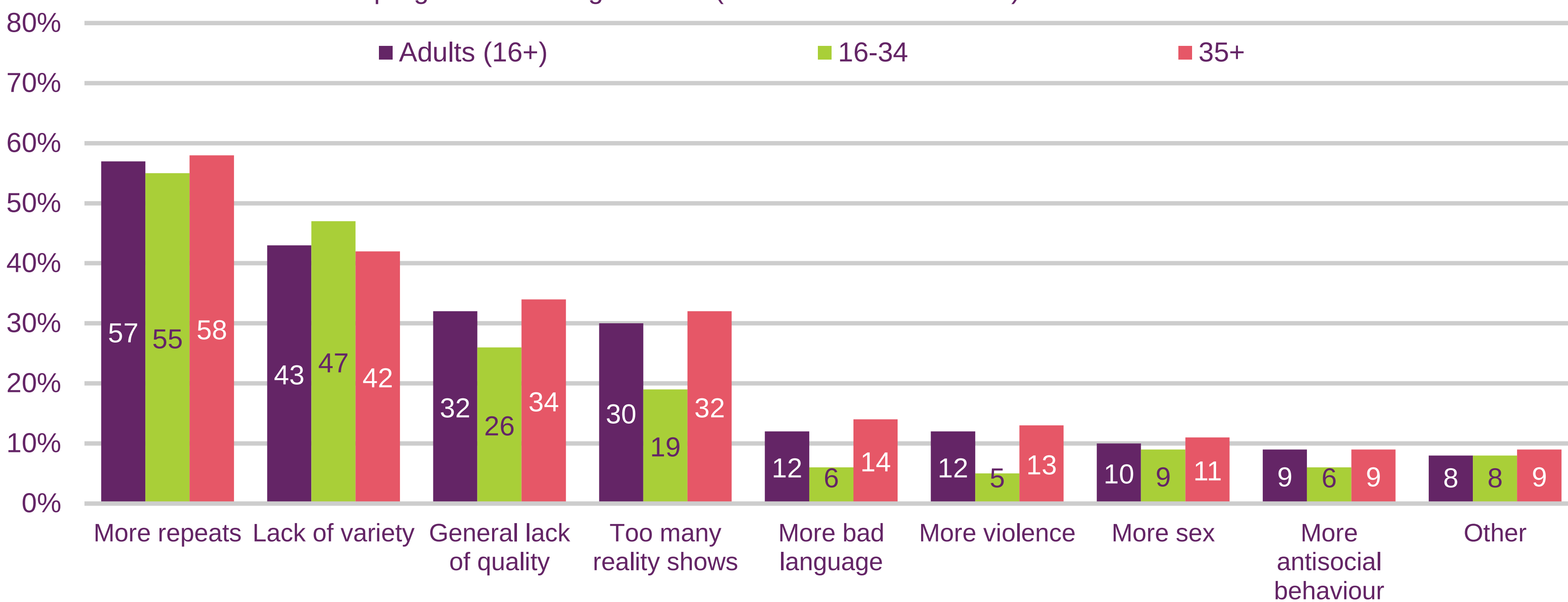


Source: Ofcom Media Tracker 2014. 'Don't know' responses not charted. Q20 - Do you feel that over the past year television programmes have improved, got worse or stayed about the same? Base: All with any TV sets (2,016); 16-24 (285), 25-34 (316); 35-44 (324) 45-54 (325); 55-64 (312); 65+ (454); ABC1 (1,045), C2DE (970). Prompted, single code. Significance testing shows any difference between any age group and all adults and any difference between socio-economic groups.

Figure 2.66

Top reasons given for programmes getting worse in past 12 months

Base: All those who said programmes had got worse (30% of adults with a TV)



Source: Ofcom Media Tracker 2014. Q22 - In what ways do you think that the television programmes have got worse over the past year? Base: All saying programmes 'got worse' over past year (639); 16-34 (114); 35+ (525). Unprompted, multimode. Only top individual responses are charted. Significance testing shows any difference between age groups.

Figure 2.67

Opinion on the amount of sex, violence and swearing on TV (% of adults with a TV)

Source: Ofcom Media Tracker 2014. 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 (2,016). Prompted, single code.