

# C – PSB Output and Spend

PSB Report 2010 – Information pack  
14<sup>th</sup> July 2010

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# Background (1)

- This information pack contains data gathered through Ofcom's Market Intelligence database in order to provide a picture of the PSB programming and spend over the last five years on PSB channels.
- The data in this report are collected by Ofcom from the broadcasters each year, as part of their PSB returns and include figures on the volume of hours broadcast during the year and programme expenditure.

## Notes on the data

- *PSB channels*
  - Where possible data has been provided for BBC One, BBC Two, ITV1, GMTV1, Channel 4, Five and the BBC's PSB digital channels: BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. BBC HD has been excluded from much of the analysis in the report as much of its output is simulcast from the core BBC channels and therefore would represent a disproportionate amount of broadcast hours and spend. Please refer to individual footnotes and chart details indicating when a smaller group of these channels is reported on. ITV1 includes GMTV1 unless otherwise stated. Data for S4C is shown in a separate section, apart from S4C's children's output which is included within the children's section of the report.
- *Spend data*
  - Programme spend represents the total cost of production or acquisition, including rights costs but excluding third party investment. In the case of commissions, it represents the price paid to the independent producer (and therefore includes a mark-up on production costs).
  - Trend data showing programme costs over a number of years is given in 2009 prices (i.e. taking account of inflation, using the Consumer Prices Index, as provided by the Office for National Statistics).

# Background (2)



- *Genre definitions*
  - The allocation of programmes to different genres and the application of common definitions was agreed with broadcasters in 2006 when programme classifications were updated and standardised across PSBs. Figures for certain genres may therefore differ slightly from earlier reported figures. These are noted where relevant. The new genre structure allowed broadcasters more flexibility in the classification of programmes to particular genres, but it has not been possible to go back and re-classify pre-2006 data, therefore analysis of trends using the new breakdowns is only possible for four of the five years reviewed in this report.
  - The following changes should be noted in the composition of the figures 2006 and later:
    - Drama includes TV movies which were previously added to Films. Entertainment includes contemporary music but Comedy is now shown separately and includes situation comedy and scripted comedy.
    - Specialist Factual includes Science & Technology, History, Nature & Wildlife and other documentaries.
    - Other Factual includes Hobbies & Leisure, Factual Magazines, Consumer Magazines and General Factual.
    - Factual Entertainment includes reality shows. In previous years some Factual Entertainment programmes were included within Entertainment.

Note: these genres are defined for our monitoring and reporting purposes, and do not necessarily correspond to definitions used in broadcasting legislation, such as the AVMS Directive.

- *Definition of peak time*
  - The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three and BBC Four peak time runs from 7pm (when broadcasting starts on these channels) to 10.30pm.



## Summary: PSB spend (1)

*Note: analysis includes BBC1, BBC2, BBC3, BBC4, CBBC, CBeebies, BBC News, BBC Parliament, ITV1, GMTV1, Channel 4 and Five. S4C is analysed later in the document. Figures are expressed in 2009 prices.*

### • Trends since 1998

- A total of £2.8bn was spent on network programming\* across PSB channels in 2009. Overall spend on network programming decreased by 17% since 2004. This reversed the period of growth which was seen between 1998 and 2004, when network expenditure increased from £2.7bn to £3.4bn. (See Figure C1).
- The pattern was similar in first run originated network programme spend which fell to £2.3bn in 2009 from a peak of £2.9bn in 2002, 2003 and 2004, corresponding to an average decrease of 19% since 2004. (See Figure C2).
- Figure C3 shows that these trends are reflected in the volume of first run originated network hours broadcast, with a rising trend seen from 1998, peaking in 2003 at 37,000 hours. By 2009, hours of originated output had fallen to 32,691 hours, a decrease of 12% since the 2003 peak.

\*Network programming excludes nations/regions programming.

## Fig C1 PSB overall network programme spend



Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. BBC figures include BBC1, BBC2, BBC3, BBC4, CBBC, CBeebies, BBC News, BBC Parliament. The analysis does not include S4C or BBC HD. Figures exclude nations/regions programming.

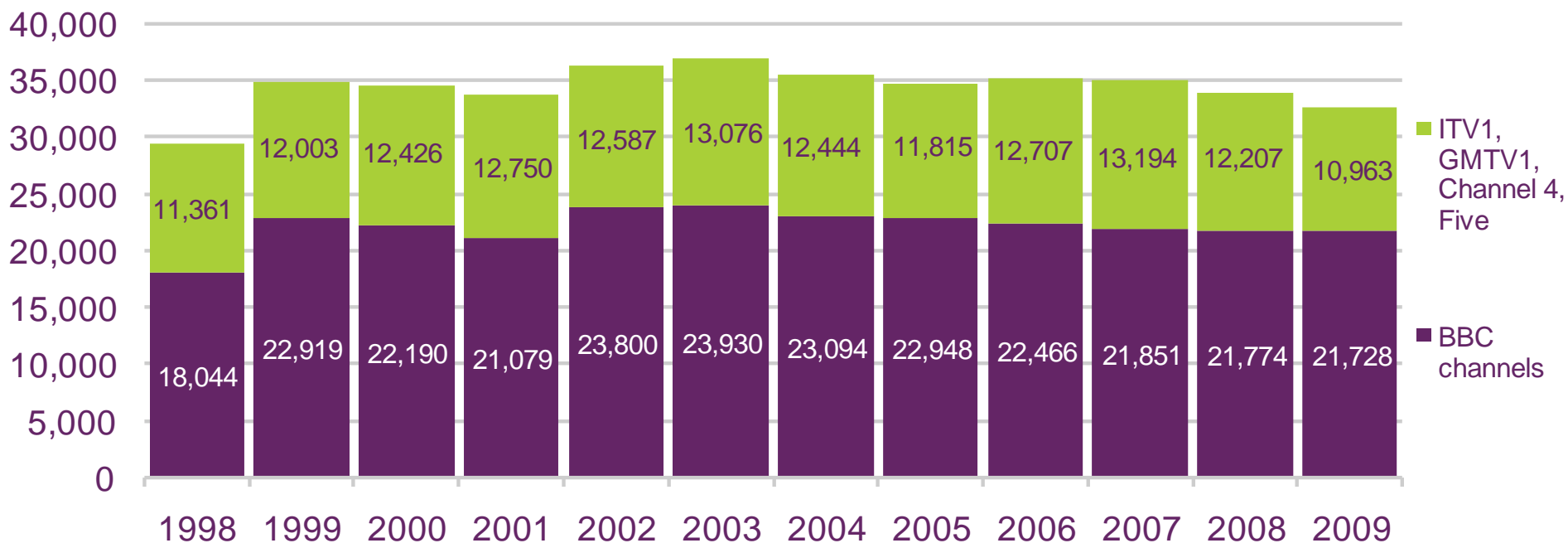
## Fig C2 PSB network spend on first-run originations



Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. BBC figures include BBC1, BBC2, BBC3, BBC4, CBBC, CBeebies, BBC News, BBC Parliament. The analysis does not include S4C or BBC HD. Figures exclude nations/regions programming.

## Fig C3 PSB hours of first-run network originations

Total 29,405 34,922 34,616 33,829 36,387 37,006 35,538 34,763 35,173 35,045 33,981 32,691



Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. BBC figures include BBC1, BBC2, BBC3, BBC4, CBBC, CBeebies, BBC News, BBC Parliament. The analysis does not include S4C or BBC HD. Figures exclude nations/regions programming.





## Summary: PSB spend (2)

### Five Year Trends

- Overall spend on network programming has decreased by an average of 4% a year or 14% since 2005 (See Figure C4).
- Network programming spend fell across all PSB channels in 2009 from 2008, but with some channels seeing sharper declines than others, as outlined in the table below:

	2005	2008	2009	% change 2005 - 2009	% change 2008 - 2009
<b>BBC One</b>	£891m	£864m	£799m	-10%	-8%
<b>BBC Two</b>	£410m	£359m	£357m	-13%	-1%
<b>BBC digital channels</b>	£260m	£215m	£206m	-21%	-4%
<b>BBC Total</b>	£1,560m	£1,438m	£1,362m	-13%	-5%
<b>ITV1 (incl. GMTV1)</b>	£933m	£851m	£810m	-13%	-5%
<b>Channel 4</b>	£547m	£505m	£467m	-15%	-8%
<b>Five</b>	£212m	£204m	£149m	-30%	-27%
<b>TOTAL</b>	£3,252m	£2,997m	£2,788m	-14%	-7%

Note: Figures are expressed in 2009 prices.



## Summary: PSB spend (3)

### Five Year Trends

- The table shows overall spend on network programming by programme genre comparing 2005, 2008 and 2009.

	2005	2008	2009	% change 2005 - 2009	% change 2008 - 2009
<b>News and Current Affairs</b>	£363m	£298m	£293m	-19%	-1%
<b>Arts and Classical Music</b>	£72m	£48m	£50m	-31%	+4%
<b>Religion and Ethics</b>	£25m	£15m	£15m	-37%	+3%
<b>Education</b>	£23m	£25m	£26m	+10%	+3%
<b>Factual</b>	£521m	£479m	£467m	-11%	-3%
<b>Drama and Soaps</b>	£886m	£819m	£732m	-17%	-11%
<b>Entertainment and Comedy</b>	£565m	£505m	£468m	-17%	-7%
<b>Feature Films</b>	£194m	£198m	£211m	+9%	+7%
<b>Sport</b>	£456m	£507m	£418m	-8%	-18%
<b>Children's programmes</b>	£146m	£103m	£108m	-26%	+5%
<b>TOTAL</b>	£3,252m	£2,997m	£2,788m	-14%	-7%

Note: Figures are expressed in 2009 prices.

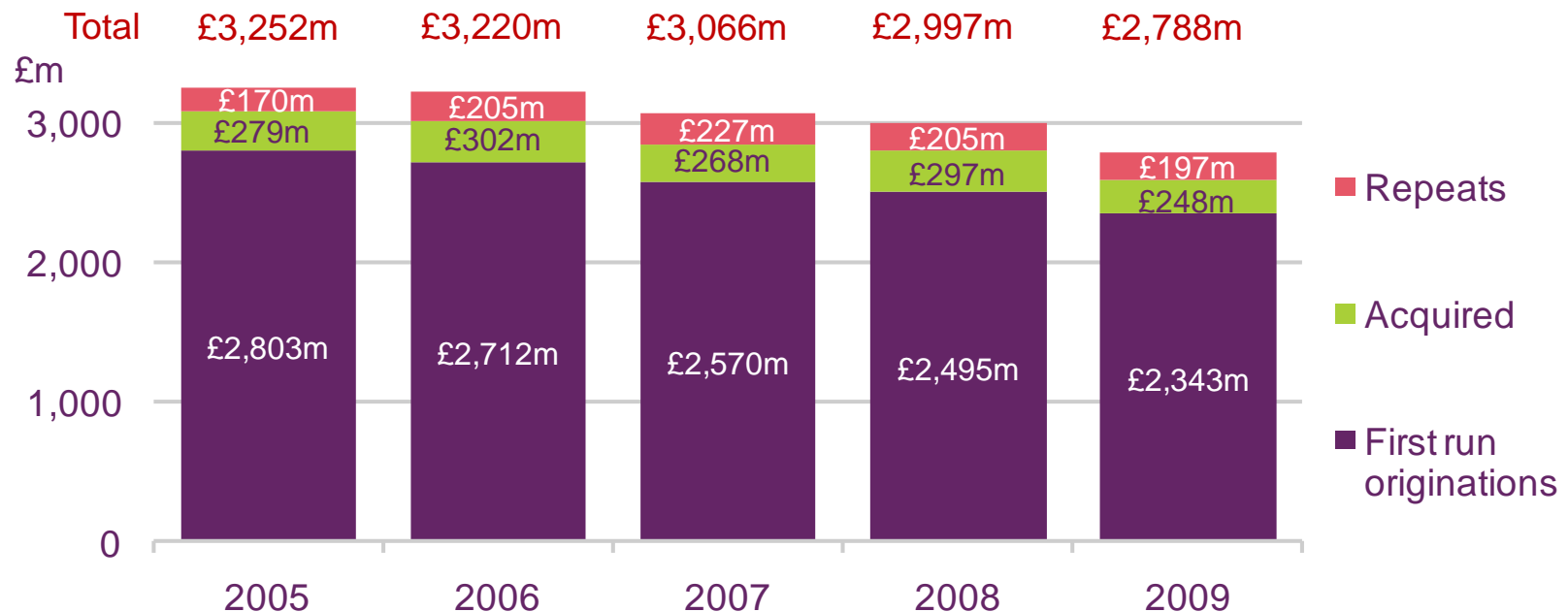


## Summary: PSB spend (4)

- All genres, except Feature Films and Education, experienced a decline in network investment from 2005 to 2009. The genres seeing the largest declines (in absolute terms) were Drama and Soap (down by £151m to £732m in 2009), Entertainment and Comedy (down by £97m to £468m in 2009), News and Current Affairs (down by £70m to £293m) and Factual programming (down by £54m to £467m in 2009) (See Figure C6).
- During this period, total spending on Children's programmes\* declined by 26% to £108m, Arts and Classical Music decreased by 31% to £50m and Religion and Ethics dropped by 37% to £15m in 2009.
- In the shorter term from 2008 to 2009, Sport experienced the most significant decline in spending, down by £89m or 18% to £418m; although this lower spend may be attributed to the lack of a major international sporting event in 2009. Spending on Drama and Soap also fell by £87m or 11% to £732m in 2009, while Entertainment and Comedy was down by £37m or 7% to £468m in 2009.
- Investment in English-language programming for the nations and regions by both the BBC and ITV1/STV/UTV fell by £46m between 2008 and 2009 to £256m (See Figure C7).
  - Spend on ITV1, STV and UTV accounted for the majority of this decline, down £39m to £81m, which represents a decline of 33%.
  - Spend on BBC nations and regions output also fell during the year, by £7m or 4%, to £175m.
- However, not all genres experienced declines in spending from 2008 to 2009 (See Figure C6). Children's programming\* saw a £5m or 5% increase to £108m in 2009, driven by a £9m increase in spend by the BBC which offset the decreased spend by the commercial PSB channels (See Figure C8). Although investment in children's output across all PSB channels included in the analysis was still lower than in 2005, when the PSB channels spent £146m.
- Spending was also slightly increased in the shorter term on Feature Films (7% or £13m), Arts and Classical Music (4% or £2m), Religion and Ethics (3% or £0.5m), and Educational programming (3% or £1m).

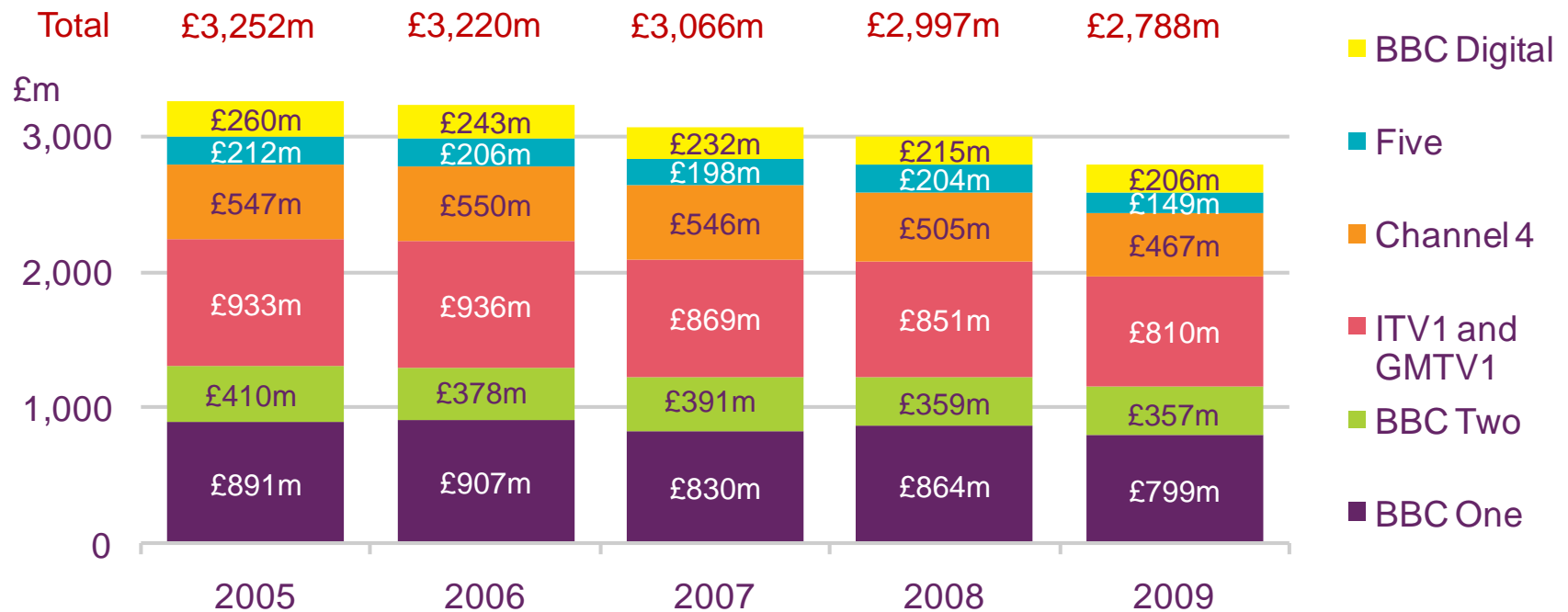
*\*The later section on Children's programming also includes figures on S4C, whereas this overall measure includes only channels available across the whole of the UK.*

## Fig C4 PSB network programme spend; by type of programming



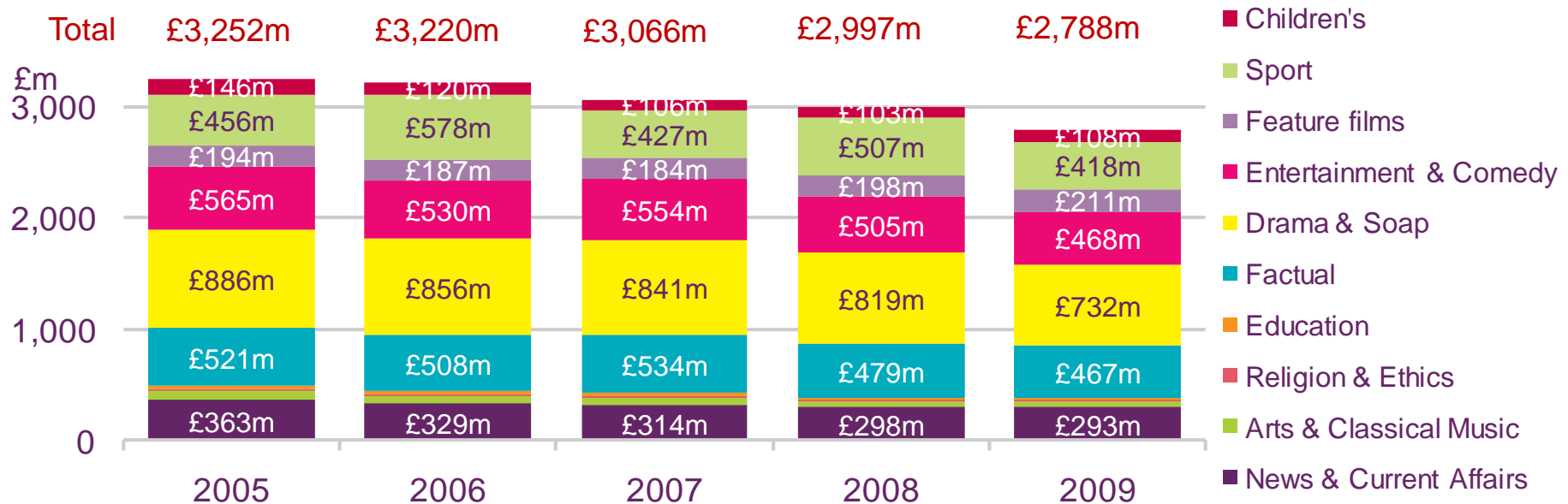
Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. Figures include PSB services: BBC1, BBC2, BBC3, BBC4, CBBC, CBeebies, BBC News, BBC Parliament, ITV1, GMTV1, Channel 4 and Five. The analysis does not include S4C or BBC HD. Figures exclude nations/regions programming.

## Fig C5 PSB network programme spend; by channel



Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. BBC Digital includes BBC3, BBC4, CBBC, CBeebies, BBC News, and BBC Parliament. The analysis does not include S4C and BBC HD. Figures exclude nations/regions programming.

## Fig C6 PSB network programme spend for PSB channels; by genre



Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. Figures include PSB services: BBC1, BBC2, BBC3, BBC4, CBBC, CBeebies, BBC News, BBC Parliament, ITV1, GMTV1, Channel 4 and Five. The analysis does not include S4C or BBC HD. Figures exclude nations/regions programming.

## Fig C7 Programme spend on nations and regions programming

Total investment in nations and regions output by the BBC, ITV1/STV/UTV

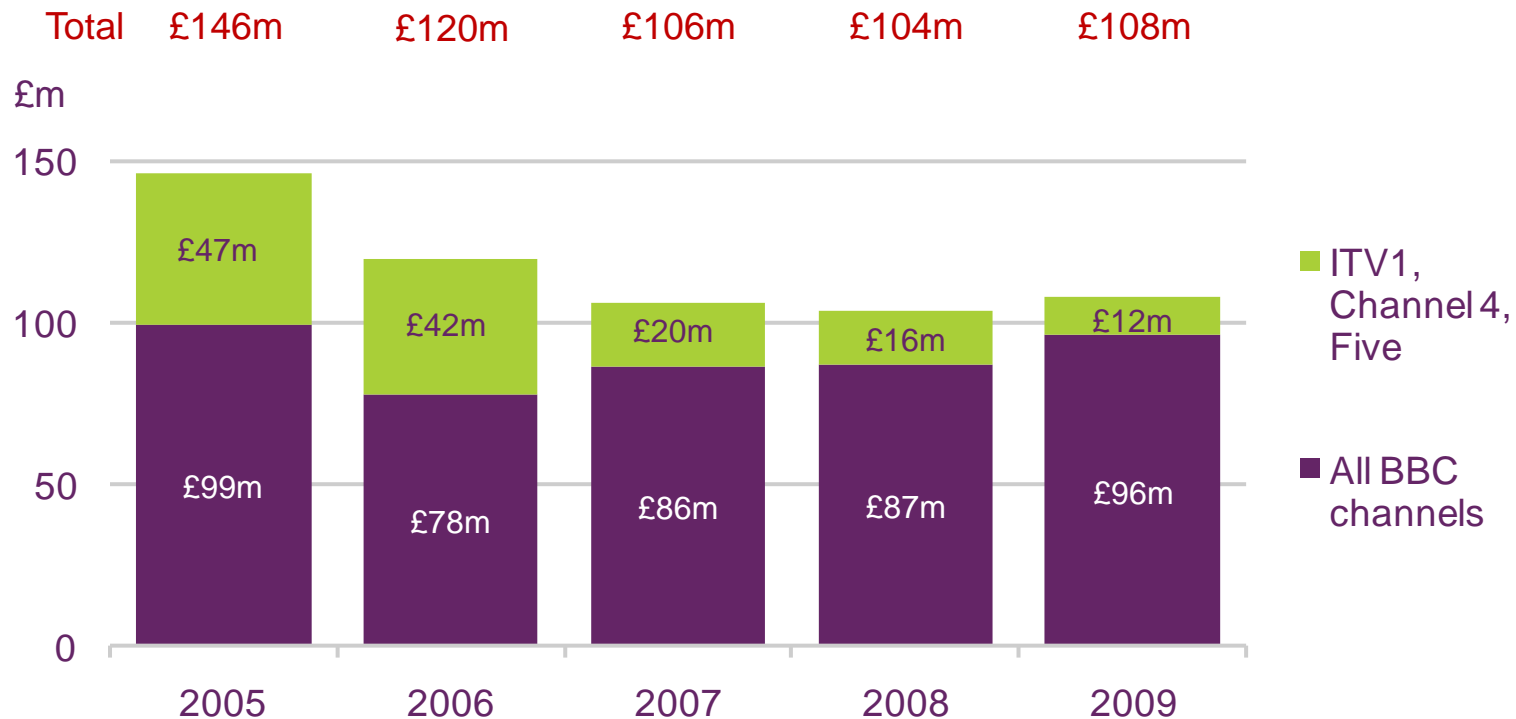
Investment (£m, 2009 prices)



Source: Broadcasters.

Note: All figures expressed in 2009 prices, excludes Gaelic and Welsh language programming but includes some Irish language programming. Figures also exclude repeats.

## Fig C8 Network children's programme spend on PSB channels



Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. ITV1 includes GMTV1. BBC channels do not include BBC HD. CITV is excluded. Note: The later section on Children's programming also includes figures on S4C, whereas this overall measure includes only channels available across the whole of the UK.



## Summary:

### PSB first run network originations spend

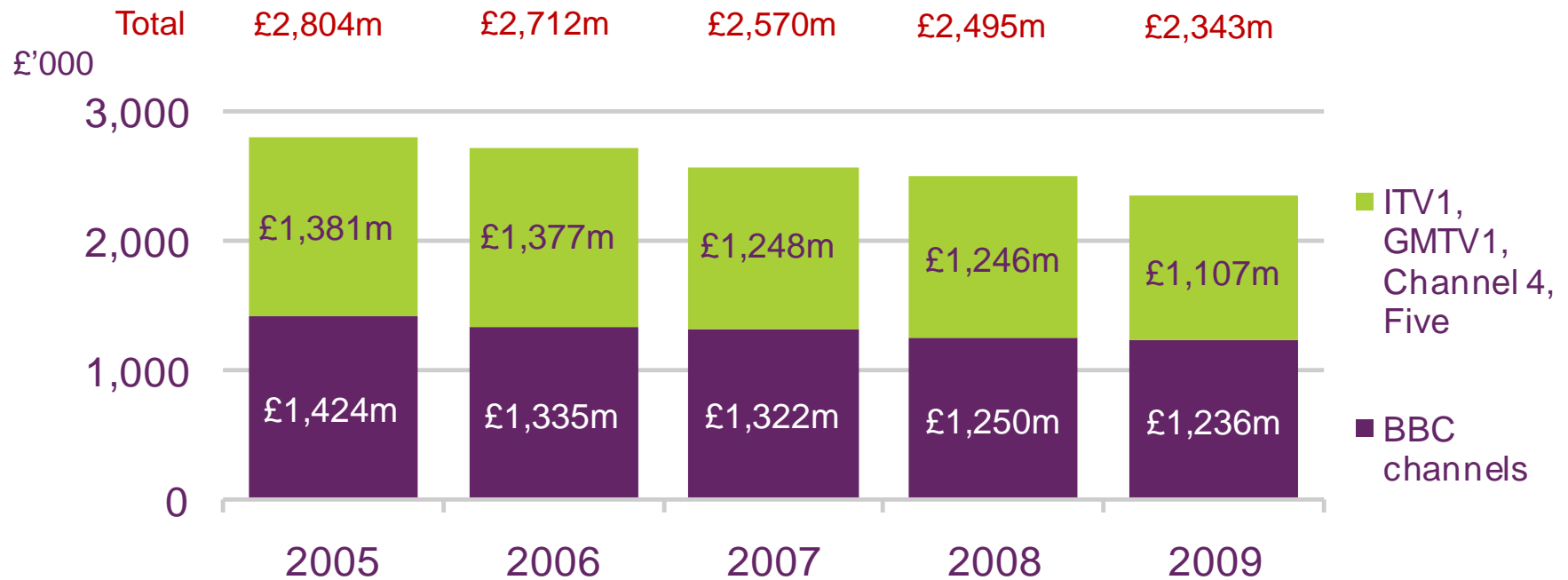
- Originated productions are those made by broadcasters or commissioned from independent production companies.
- In 2009, £2,343m was spent by the PSB channels on first-run originated network programming; a decrease of 4% a year, or 16% since 2005. The reduction was across the BBC's PSB channels as well as the commercial PSBs although the decrease was more rapid on ITV1, Channel 4 and Five combined. The decrease on the BBC's channels was 13% over the period. (See Figure C9).
- Figure C10 shows that the reductions in expenditure have taken place on all PSB channels to a greater or lesser extent. The largest reduction in spend on first run network originations since 2005 was spend by Five which fell from £121m to £69m (43%). Spend on BBC digital channels reduced by 24% from £245m in 2005 to £185m in 2009 while the decreases on BBC One and Two were lower at 9% and 15% respectively. On ITV1 (including GMTV) total originated spend fell in 2009 to £696m, lower than BBC One's spend (£738m) for the first time. On Channel 4 expenditure fell by 18% since 2005.
- Decreases in originated spend since 2005 can be seen across all programme genres with the exception of commissioned feature films where expenditure rose to £17m from £10m in 2005 (See Figure C11).
- This downward trend is also reflected in the volumes of first run originated programme hours broadcast by PSB channels. Although the number of hours increased by 410 hours between 2005 and 2006, volumes decreased each year since 2006, falling to 32,691 hours in 2009, compared with 34,763 hours in 2005. Figure C12 shows that the reductions occurred in most programme genres, except Factual hours which increased by 17% since 2005 and Entertainment and Comedy programmes which showed a rise of 6% over the period.

## Summary:

### PSB first run network originations spend

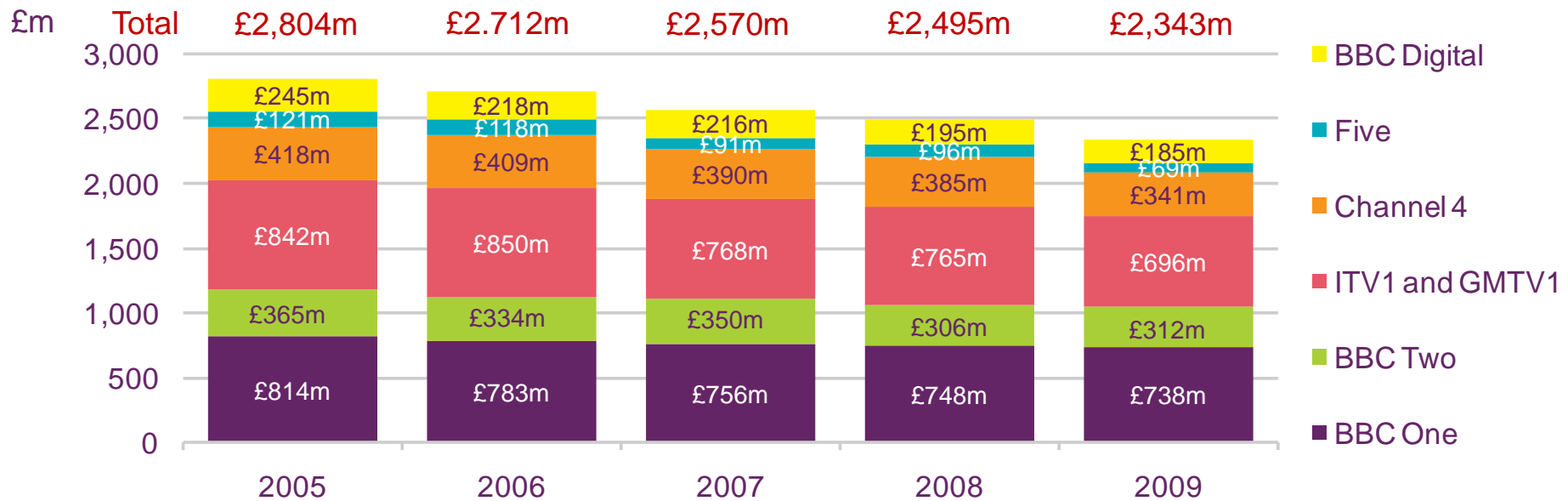
- There are also some factors that may help to explain the decline in spend on first-run originated programming:
  - There has been a continued real-term fall in advertising revenue for the commercial PSB channels (34% from 2005 to 2009), at the same time as an increase in distribution costs.
  - Production efficiencies have the potential to deliver programmes of comparable quality, genre or length at a reduced cost. A range of new production techniques have been adopted to reduce the cost of programme production. Examples include using the same set for the production of a programme format for several different countries.
  - Increasingly, additional funding for new programmes is found by producers to ensure that commissioned output is fully funded; this can include up-front loans secured against 'back end' revenue streams such as DVD sales and programme exports. A recent report from PACT estimated that independent producers were responsible for an increasing contribution to productions estimated in the region of £160m-£190m in 2008, which is around 6%-8% of total PSB first-run originated programming spend.
- At the same time there have also been changes in programmes, scheduling and commissioning strategies, e.g. BBC Children's strategy to produce fewer new programmes, but aiming to make these 'bigger and better'.

## Fig C9 PSB network programme spend on first-run originations



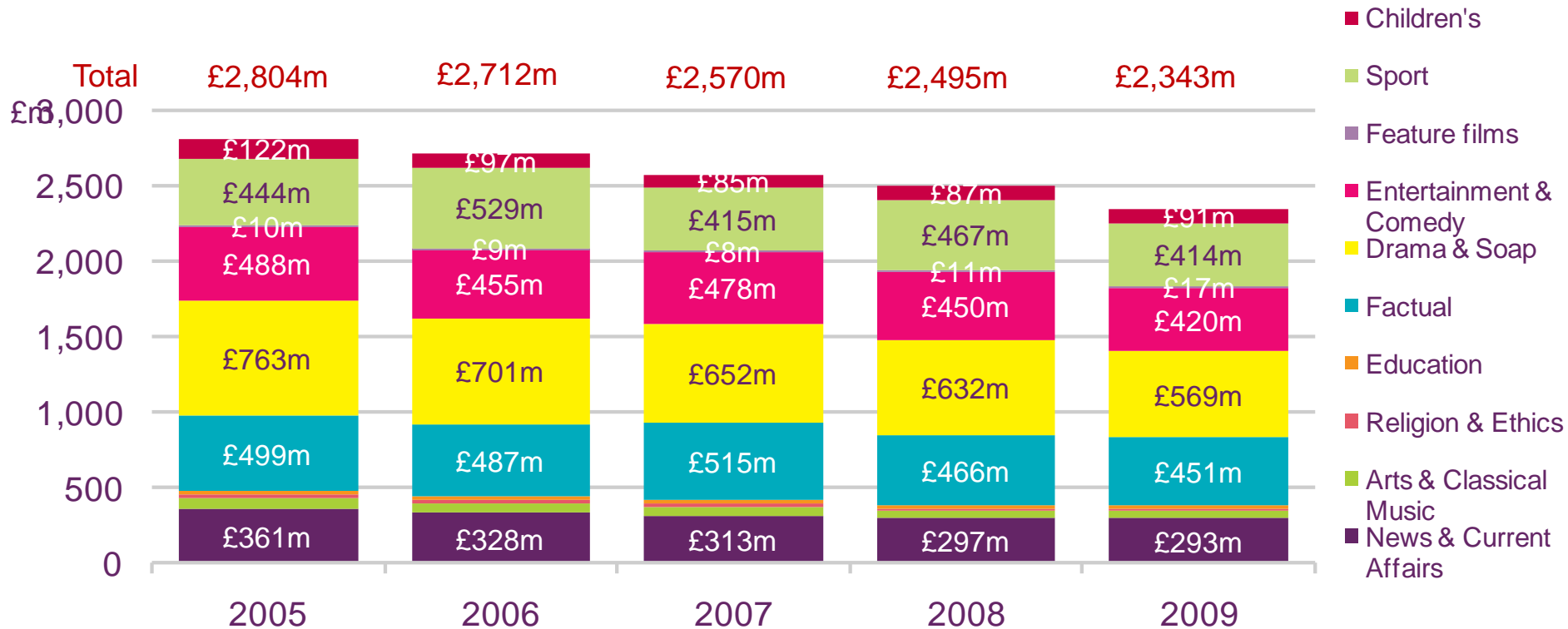
Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. BBC figures include BBC1, BBC2, BBC3, BBC4, CBBC, CBeebies, BBC News, BBC Parliament. The analysis does not include S4C or BBC HD. Figures exclude nations/regions programming.

## Fig C10 PSB first run originations spend; by channel



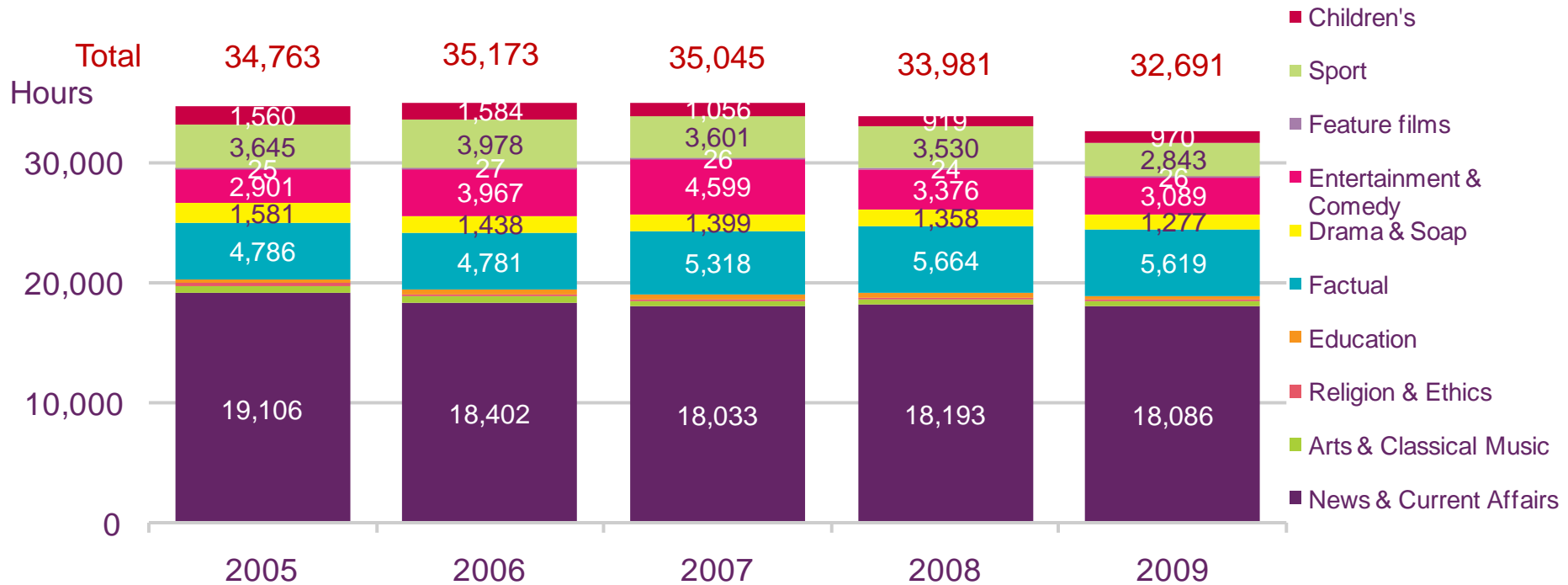
Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. BBC Digital includes BBC3, BBC4, CBBC, CBeebies, BBC News, and BBC Parliament. The analysis does not include S4C and BBC HD. Figures exclude nations/regions programming.

## Fig C11 PSB first run originations spend; by genre



Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. Figures include PSB services: BBC1, BBC2, BBC3, BBC4, CBBC, CBeebies, BBC News, BBC Parliament, ITV1, GMTV1, Channel 4 and Five. The analysis does not include S4C or BBC HD. Figures exclude nations/regions programming.

## Fig C12 PSB first run origination hours; by genre



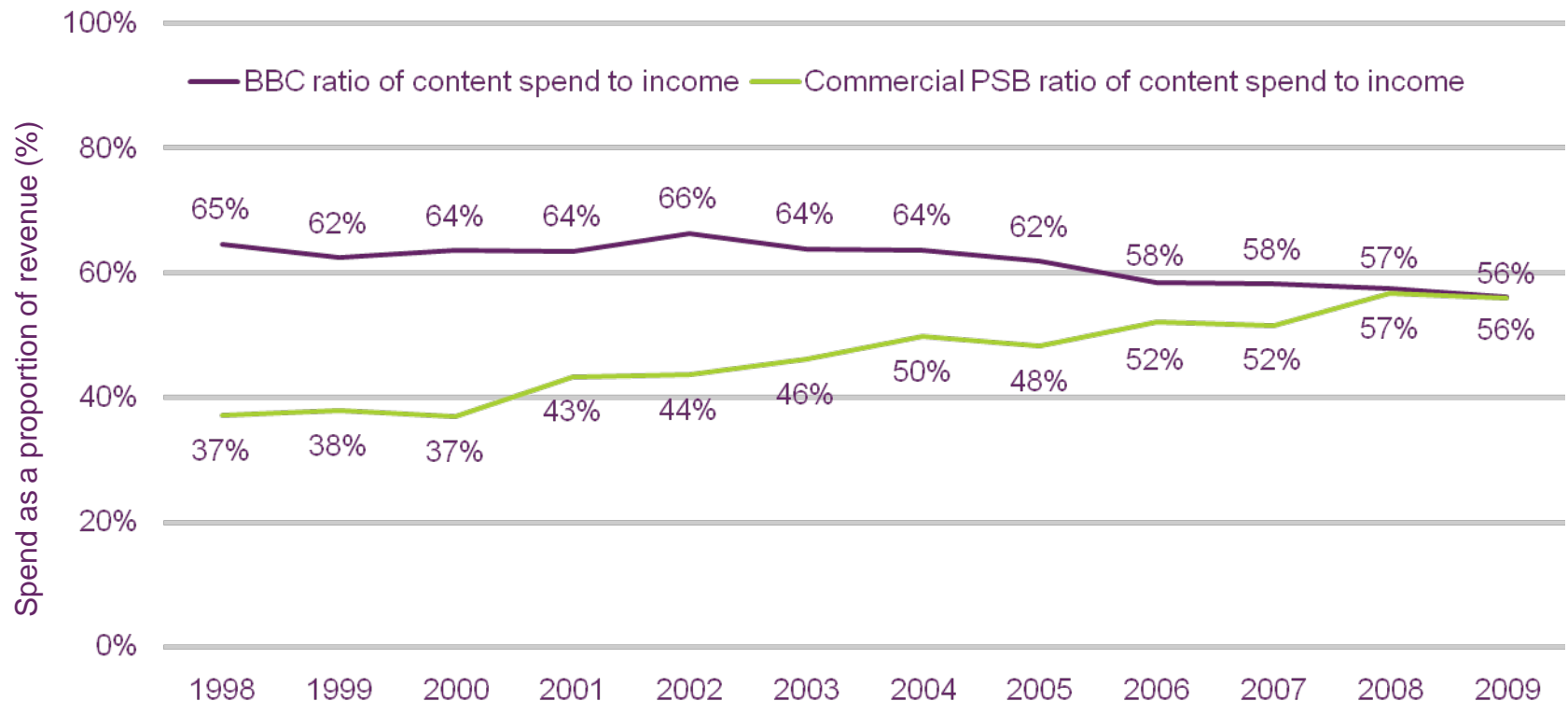
Source: Ofcom/broadcasters. Note: figures are expressed in 2009 prices. Figures include PSB services: BBC1, BBC2, BBC3, BBC4, CBBC, CBeebies, BBC News, BBC Parliament, ITV1, GMTV1, Channel 4 and Five. The analysis does not include S4C or BBC HD. Figures exclude nations/regions programming.

## Ratios of originated content spending versus revenue

- Figure C13a provides an indication of the ratio between spend on first-run originated programming and income. For the commercial PSBs the main sources of revenue were advertising and sponsorship, and for the BBC the income was from the licence fee. This analysis is based on Ofcom's estimate of the licence fee allocated to television in the case of the BBC. Spend is all day, all genres. It includes all spending on networked output by the BBC, ITV1, Channel 4 and Five. It also includes BBC, stv, ITV1 and UTV spending on programmes for viewers in the nations and regions and the BBC's spend on programmes for S4C and BBC Alba.
- The analysis provides an indication of the ratio between first-run investment and revenue, drawing on broadcaster data, public domain data, and Ofcom estimates.
- A variety of factors may influence the direction of the ratio, including expenditure on rising/new distribution (e.g. multiplatform) and infrastructure costs. It is possible that the commercial ratio has increased because content spending strategies have not yet caught up with declining revenue from advertising.
- The analysis indicates that the commercial PSB channels have increased investment as a proportion of revenue from 37% in 1998 to 56% in 2009. The ratio has declined for the BBC from 65% in 1998 to 56% in 2009.
- Ofcom estimates of the BBC's spend on radio and online services from 2005 to 2009 as a proportion of total content spend suggest that investment in these services has remained consistent during this period, with around three-quarters invested in television, one fifth in radio and 5% in online services. See Figure C13b.



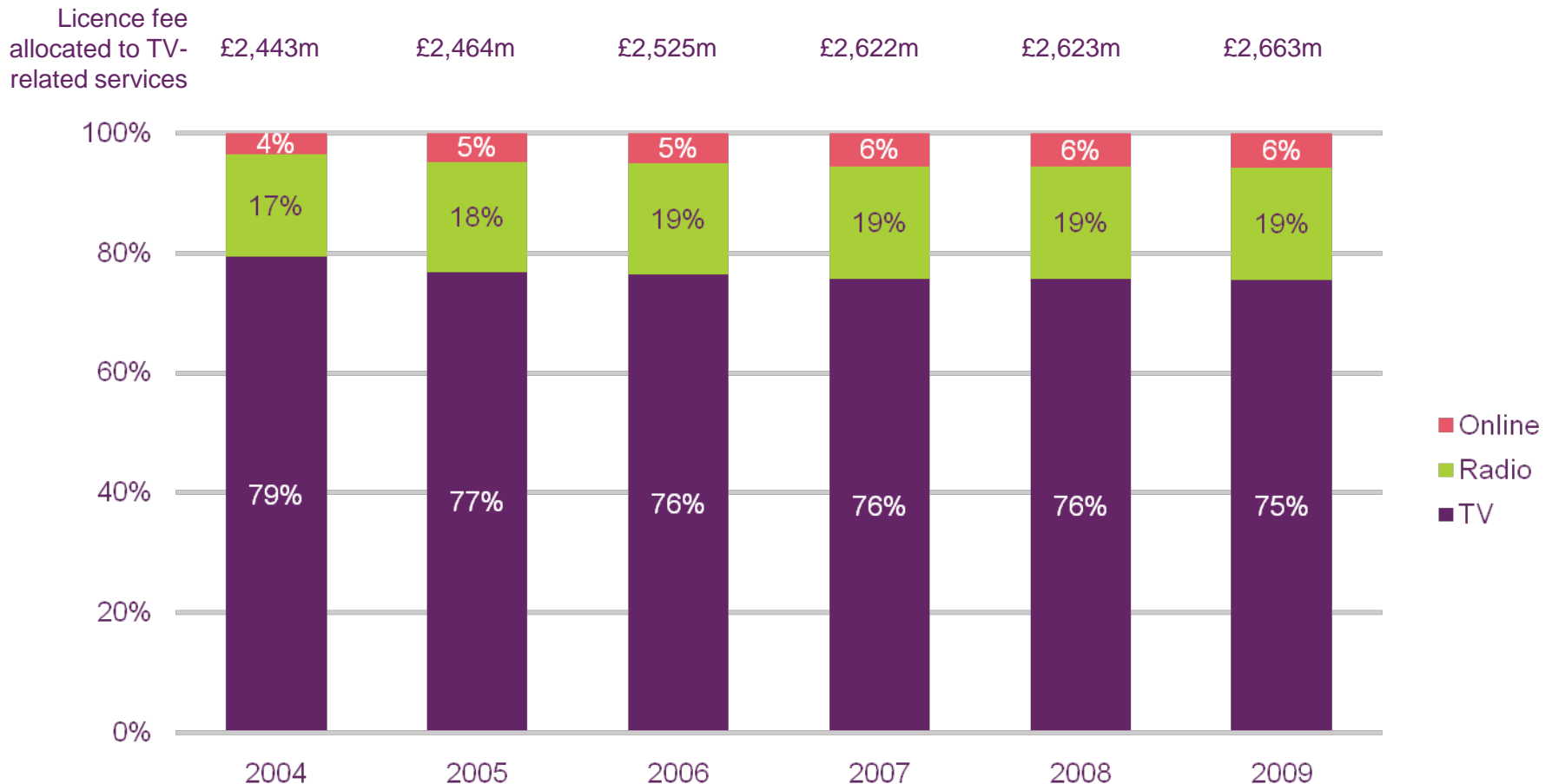
### Fig C13a PSB first run originated television programming: ratio of spend to revenue



**Source:** Broadcasters and Ofcom estimates drawing on data from the BBC's Annual Reports and Accounts. Spend is all day, all genres. It includes all spending on networked output by the BBC, ITV1, Channel 4 and Five. It also includes BBC, stv, ITV1 and UTV spending on programmes for viewers in the nations and regions and the BBC's spend on programmes for S4C, BBC Alba. BBC income is based on Ofcom estimates of total licence fee revenue that is spent on TV-related services, drawing on public domain information.



## Fig C13b Proportion of LF spending allocate to each services type



Source: BBC Annual Report and Accounts and Ofcom calculations. The spending allocated to television services includes all reported content, distribution and infrastructure costs; expenditure on BBC Alba and S4C, spend on Digital Text Services, financial contributions to Digital UK and the Digital Switchover Help Scheme and a pro-rata allocation of remaining overheads. Figures presented here may not match those published in the Communications Market Report 2009 owing to improvements in the calculation methodology.



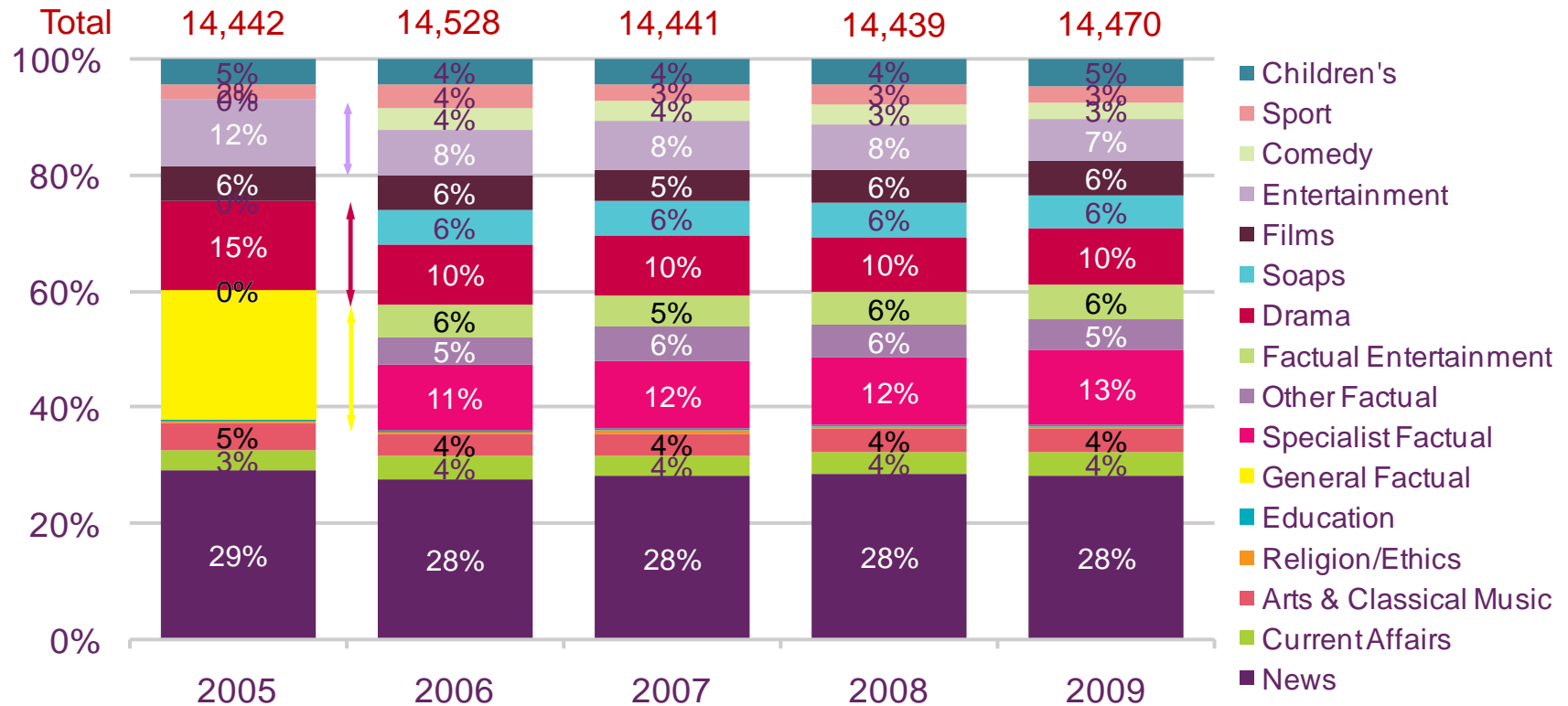
## Summary: Overview of output on PSB Channels – Volume of hours broadcast and programme expenditure

- In peak time, the aggregated proportion of hours and spend broadcast by PSB channels\* by genre remained relatively stable between 2005 and 2009 (See Figures C14 – C15).
  - By volume, more News programmes were shown in 2009 than any other genre (28%), followed by Factual (including Factual Entertainment) (24%) with Drama at 10%, Soaps at 6% and Entertainment & Comedy at 10% of output.
  - Highest spend by genre was in Drama (24%) with Soaps at 13%, Factual (including Factual Entertainment) at 20% and Entertainment & Comedy at 19%.
- Across the complete 24 hours, News made up 29% of hours in 2009 with Children's and Factual programmes accounting for the next highest percentage (both at 17%) (See Figures C16– C17).
  - In spend terms across the full day, Drama accounted for 18%, Soaps a further 8%, Factual 17%, Entertainment & Comedy 17%, Sport 15%, News 8% and Children's 4%.
- The five main PSB channels (BBC One, BBC Two, ITV1, Channel 4 and Five) offered a diverse range of programmes by genre in peak time and across the 24-hour schedule. As BBC digital channels are targeted to particular audiences, the volume of output displays a narrower range, particularly on CBBC, Cbeebies, BBC News & Parliament. For more detail, see Figures C18 – C21).

\* PSB channels include BBC One, BBC Two, ITV1, GMTV1, Channel 4, Five, BBC Three, BBC Four, CBBC, Cbeebies, BBC News and BBC Parliament. BBC HD and S4C are not included in the following figures.

## Fig C14 Peak-time output on PSB channels\*, 2005-2009

Proportion of output (hours %)



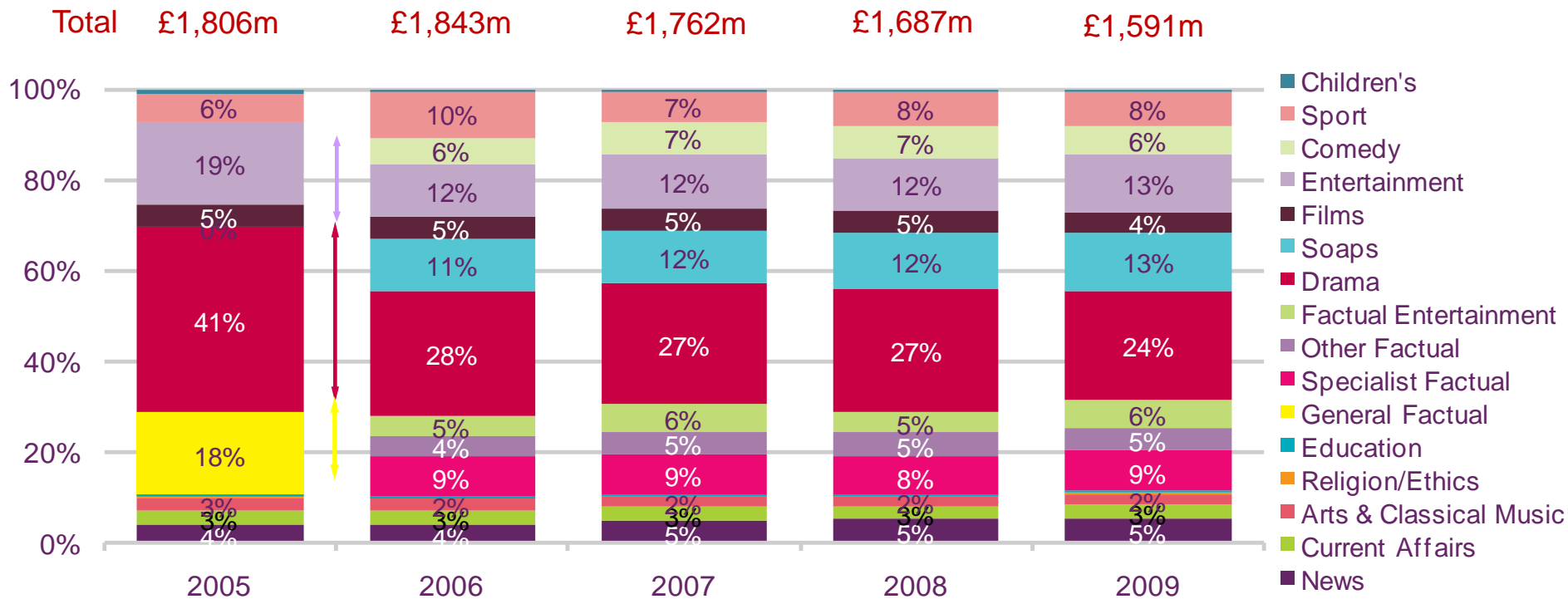
Source: Ofcom/broadcasters

Note: Arrows indicate where old genre definitions (Entertainment, Drama incl. Soaps, and General Factual) map to new genre definitions

\* All PSB channels excluding S4C and BBC HD. Figures exclude nations/regions programming

## Fig C15 Peak-time spend on PSB channels\*, 2005-2009

Proportion of spend (£ %)



Source: Ofcom/broadcasters

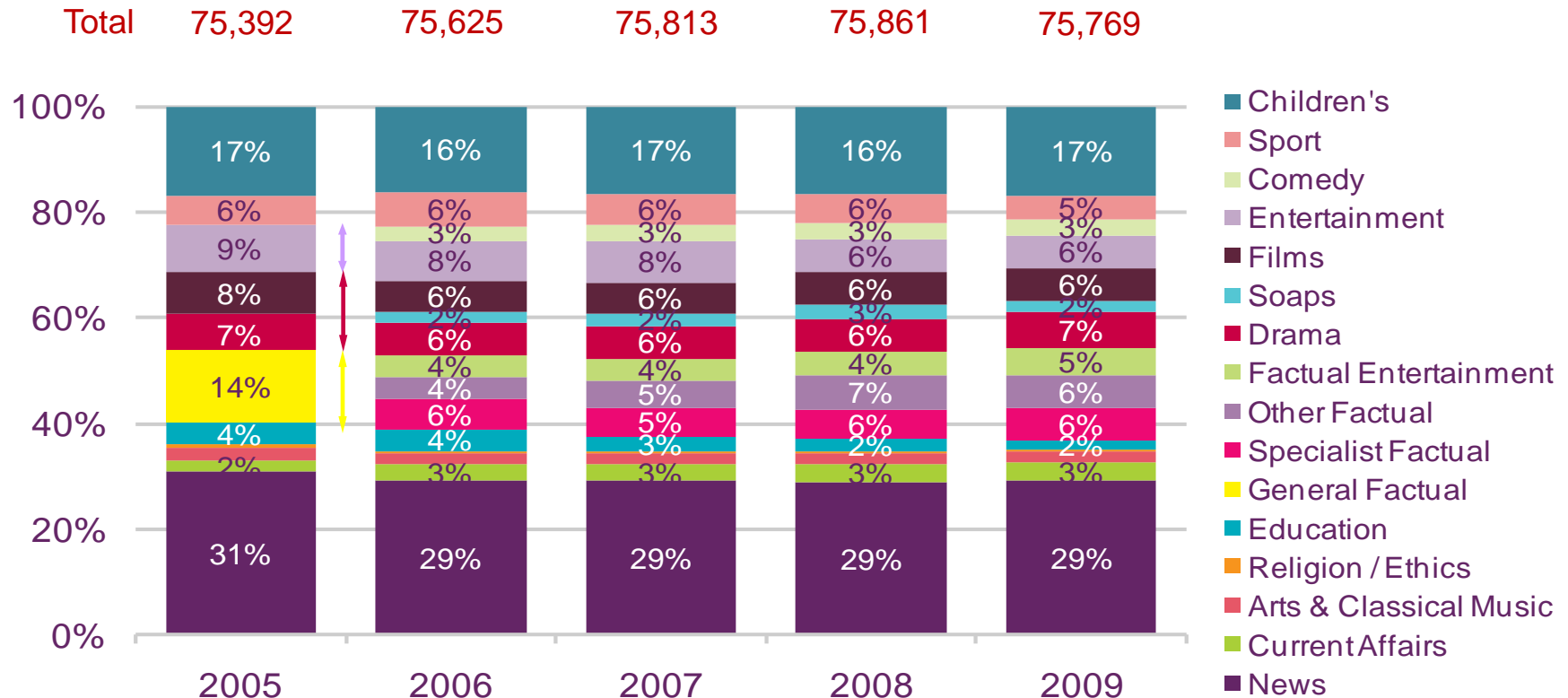
Note: Arrows indicate where old genre definitions (Entertainment, Drama incl. Soaps, and General Factual) map to new genre definitions

\*All PSB Channels excluding S4C and BBC HD. Figures exclude nations/regions programming. Programme costs are given in 2009 prices.



## Fig C16 24-hour output on PSB channels\*, 2005-2009

Proportion of output (hours %)



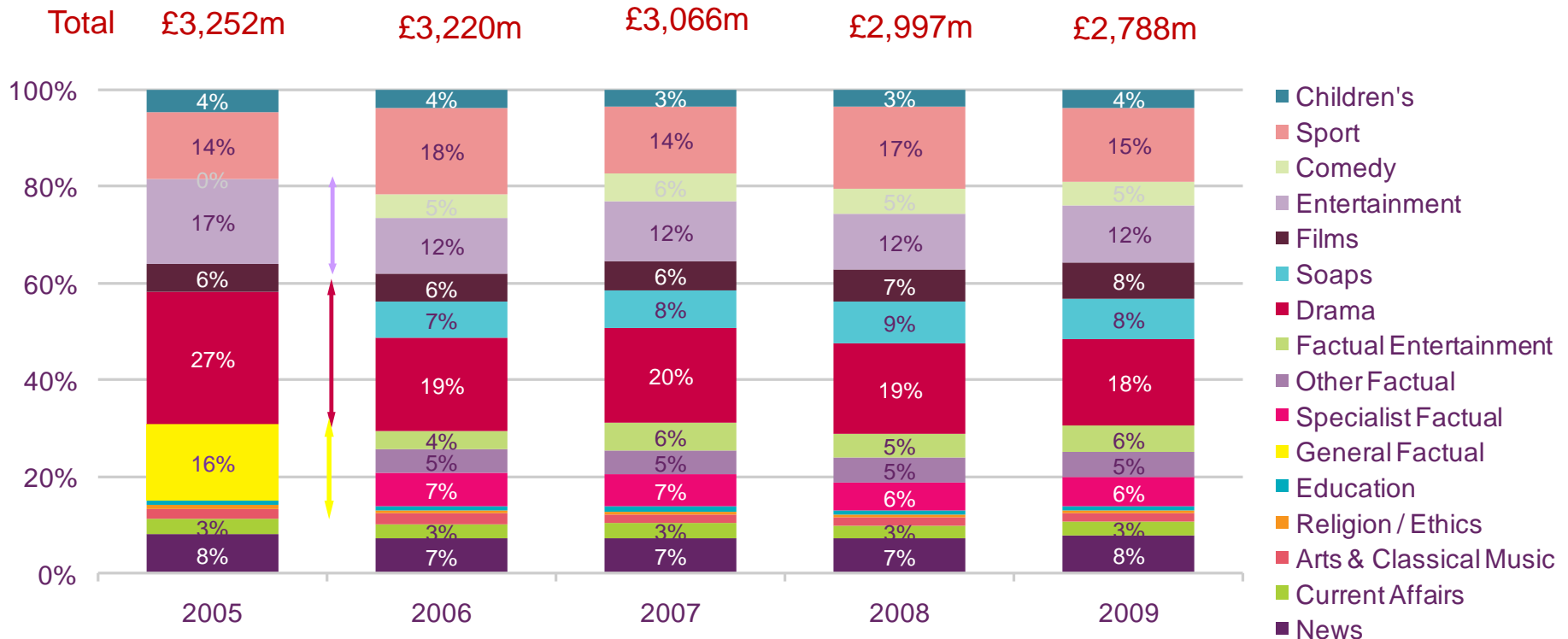
Source: Ofcom/broadcasters

Note: Arrows indicate where old genre definitions (Entertainment, Drama incl. Soaps, and General Factual) map to new genre definitions

\* All PSB Channels excluding S4C and BBC HD. Figures exclude nations/regions programming.

## Fig C17 24-hour spend on PSB channels\*, 2005-2009

Proportion of spend (£ %)



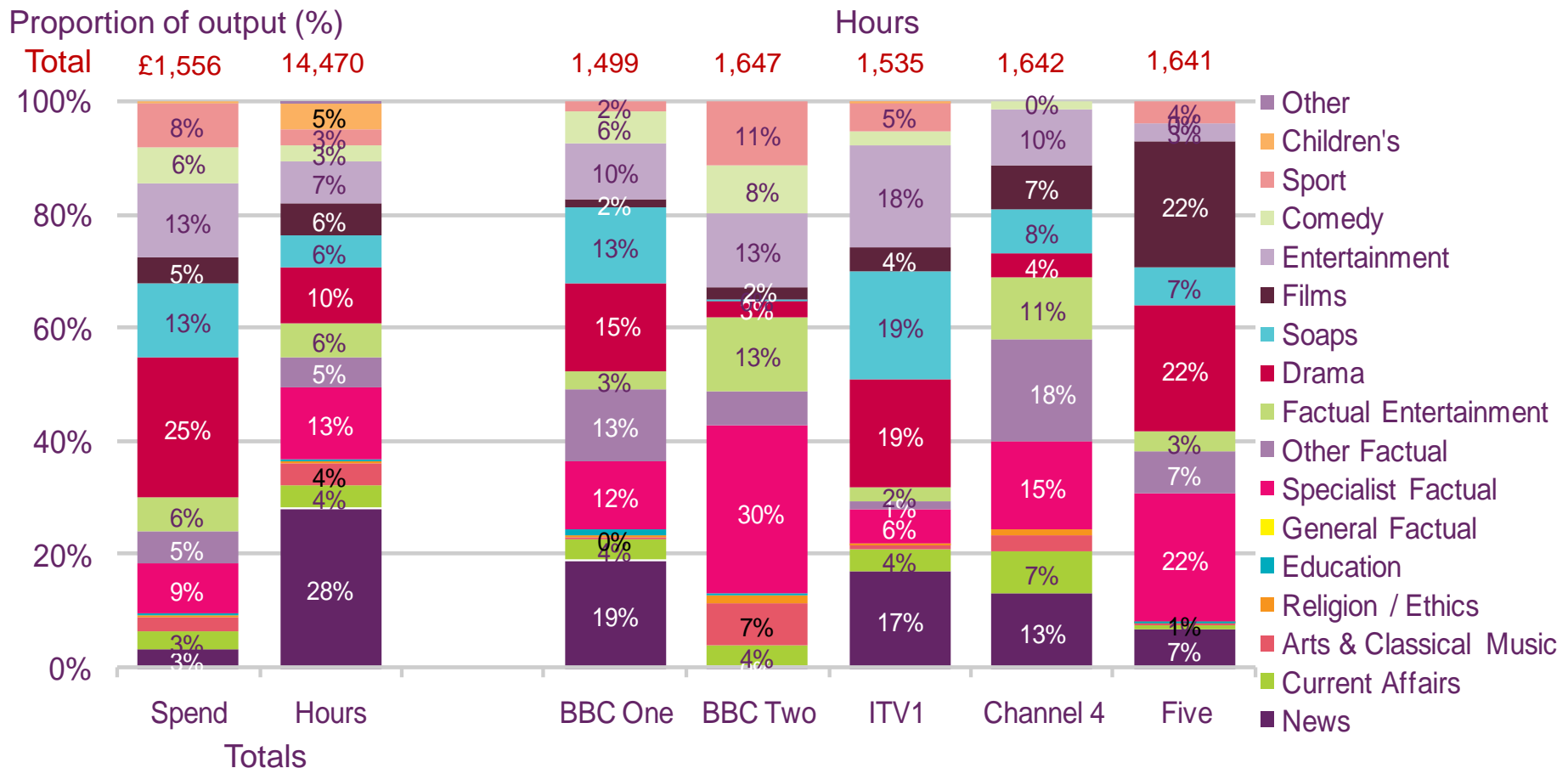
Source: Ofcom/broadcasters

Note: Arrows indicate where old genre definitions (Entertainment, Drama incl. Soaps, and General Factual) map to new genre definitions

\*All PSB Channels excluding S4C and BBC HD. Figures exclude nations/regions programming.

\*Programme costs are given in 2009 prices, taking account of inflation using the Consumer Prices Index as provided by the Office of National Statistics

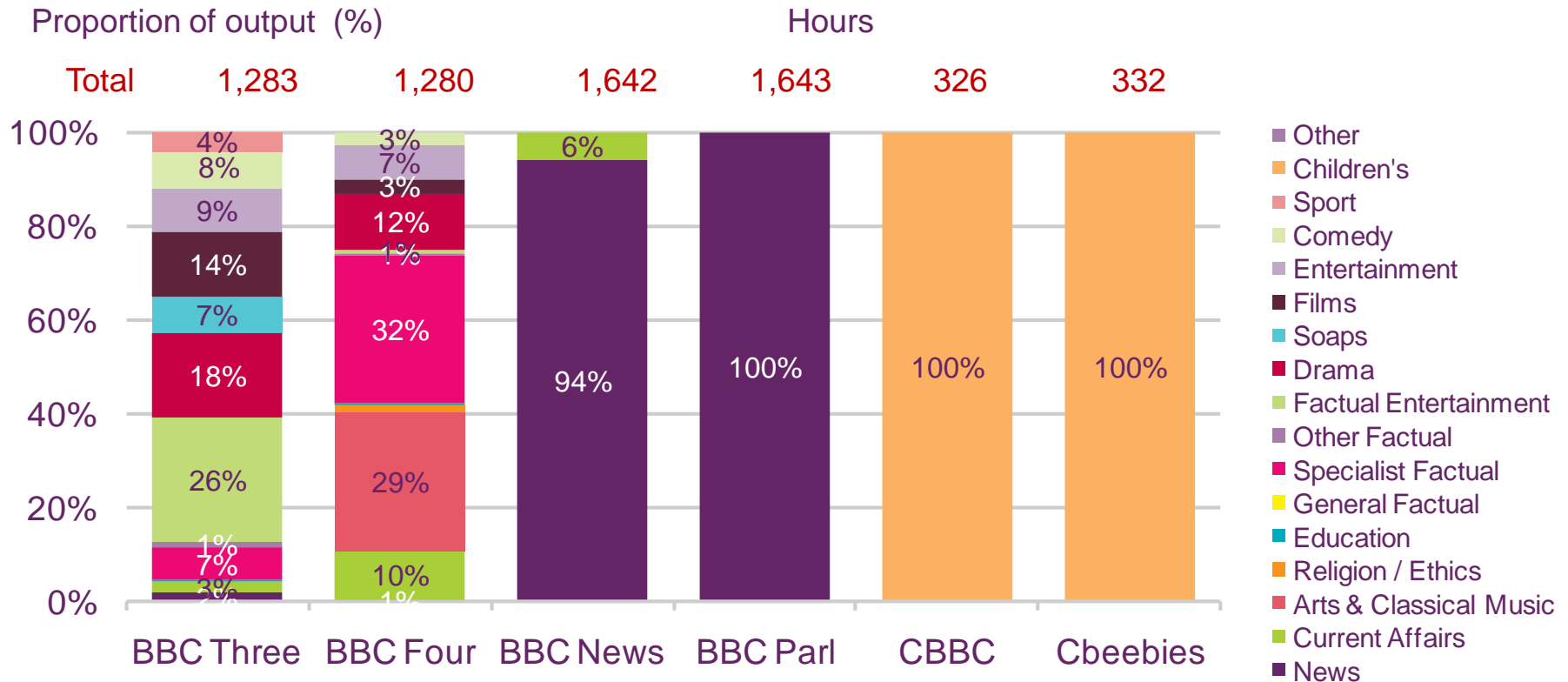
## Fig C18 Proportion of peak-time genre output by channel, 2009



Source: Ofcom/broadcasters

Note: Total spend and hours data for all PSB channels excluding S4C and BBC HD. Figures exclude nations/regions programming.

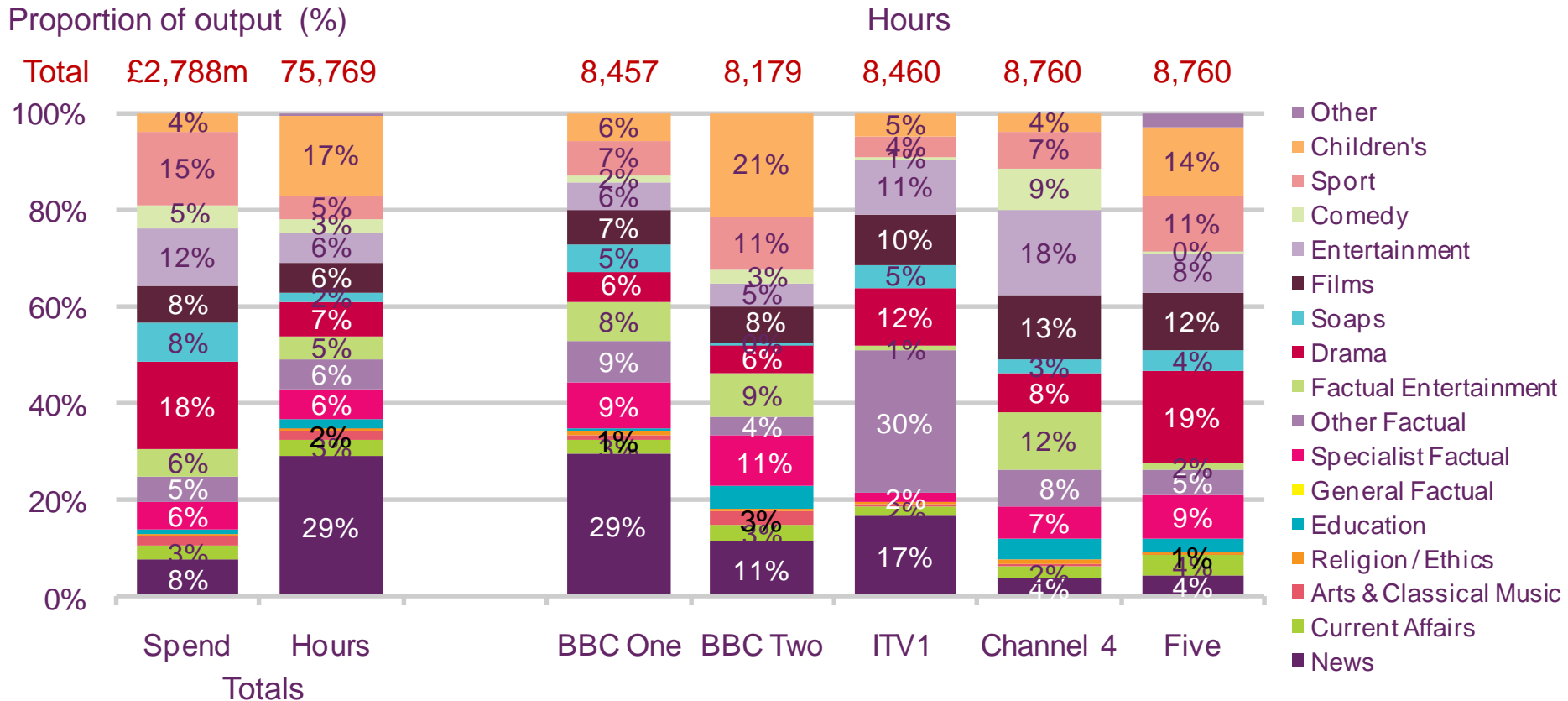
## Fig C19 Proportion of peak-time genre output by channel, 2009



Source: Ofcom/broadcasters



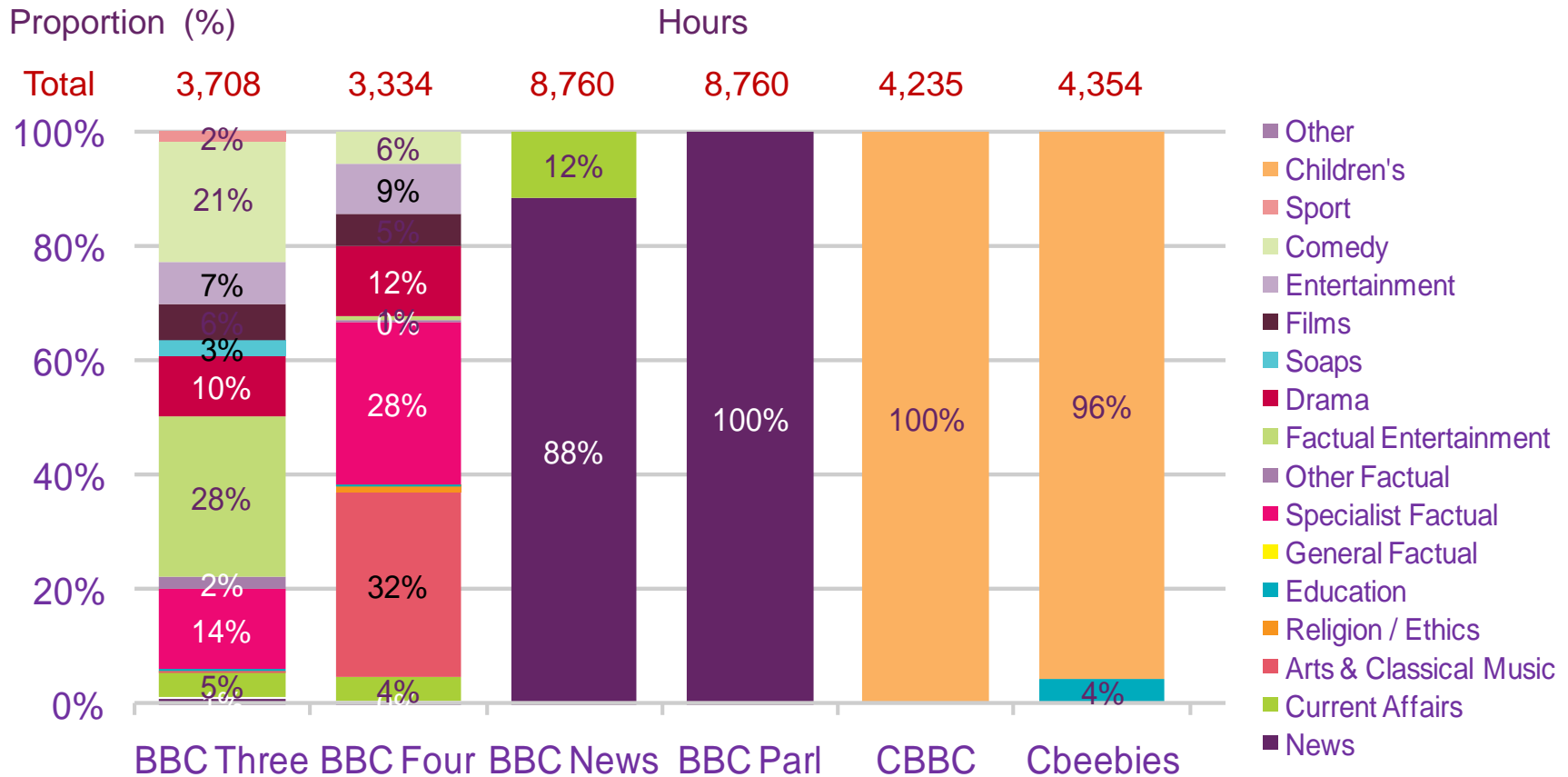
## Fig C20 Proportion of genre output by channel, 24 hours, 2009



Source: Ofcom/broadcasters

Note: Total spend and hours data for all PSB channels excluding S4C and BBC HD. Figures exclude nations/regions programming.

## Fig C21 Proportion of genre output by channel, 24 hours, 2009



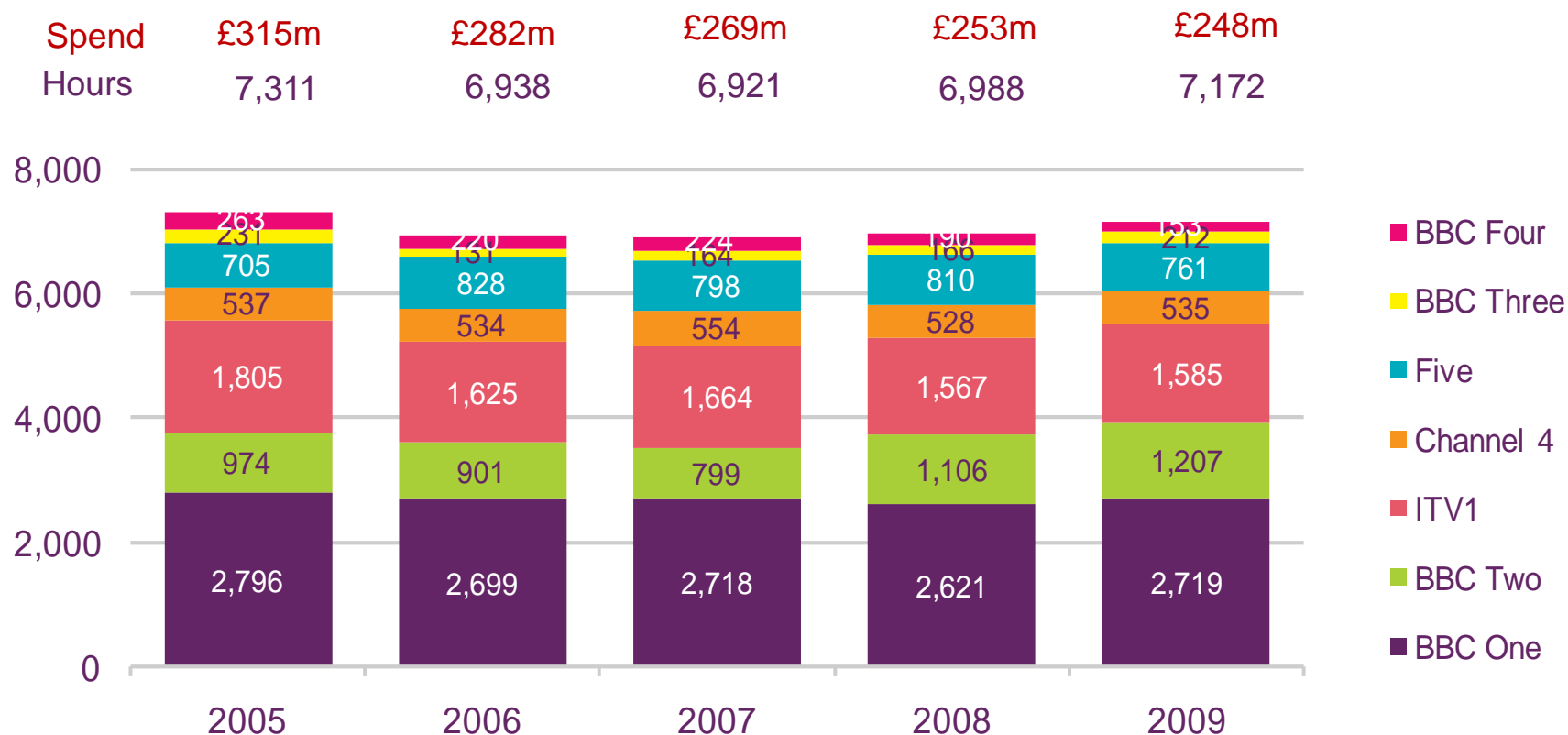
Source: Ofcom/broadcasters

## Summary: UK/national News and Current Affairs

- Volumes of national News and Current Affairs programmes taken together on the five main PSB channels, and BBC Three & Four remained relatively stable between 2006 and 2009 at around 7,000 hours (See Figure C22).
  - Levels on BBC One, ITV1, Channel 4 and Five fluctuated a little over the period, while the volume on BBC Two increased by 24%.
- Programme expenditure fell by an average of 6% per year since 2005 and stood at £248m in 2009.
- Reductions in the number of hours of News and Current Affairs in peak time in 2006 and 2007 were reversed in 2008 and 2009 (See Figure C23) while the figure for expenditure on News and Current Affairs fell in 2009 to £124m from £130m in the previous two years.

*Note: The BBC digital channels, BBC News and BBC Parliament are not included in Figures C22 to C25 but almost all of their output consists of News and parliamentary News, which totalled 16,500 hours in 2009.*

## Fig C22 Annual volume of hours of UK/National news and current affairs output, all day 2005-2009

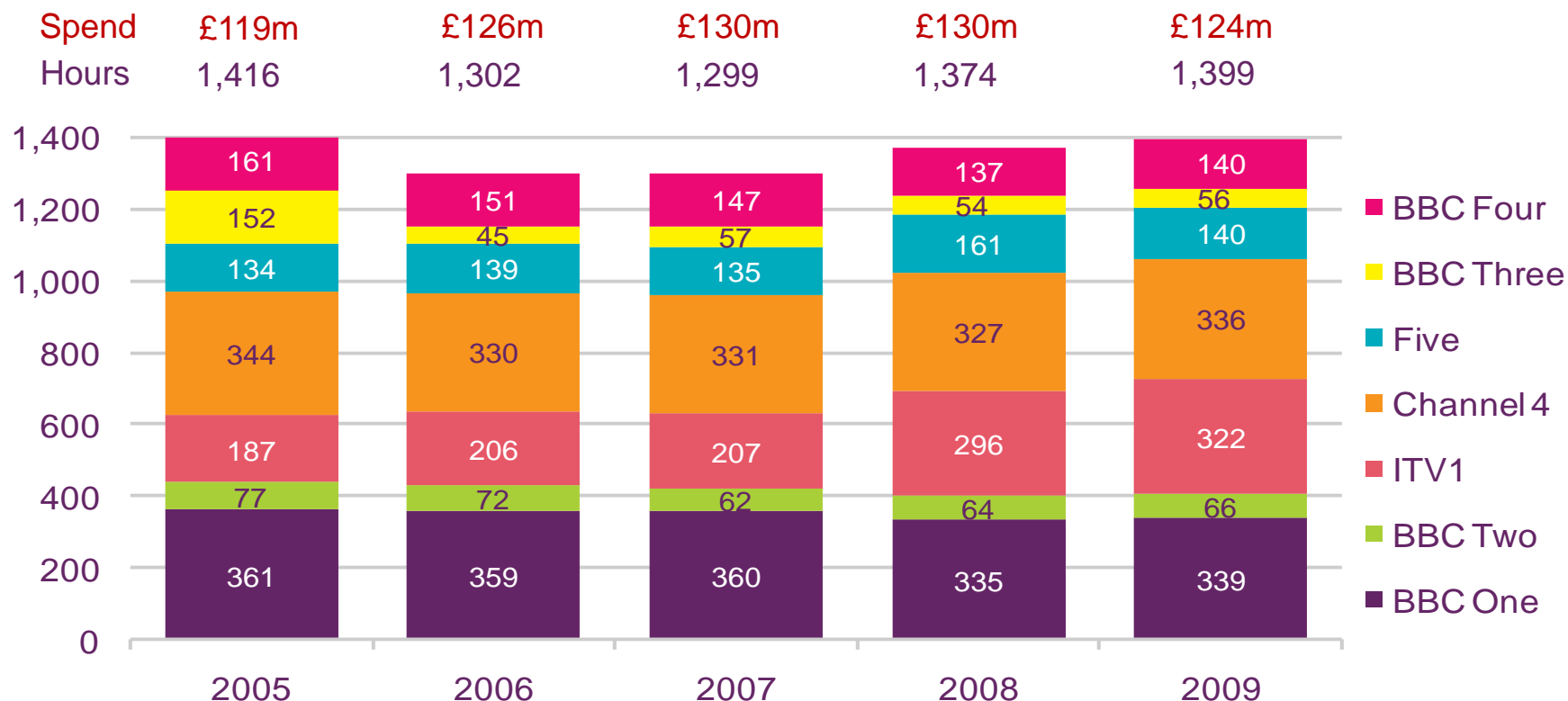


Source: Ofcom/broadcasters

Note: UK/national News refers to network news and excludes non-network news.

Spend is given in 2009 prices

**Fig C23 Volume of hours of UK/national news and current affairs, peak time, 2005-2009**



Source: Ofcom/broadcasters

Note: UK/national News refers to network news and excludes non-network news.

Spend is given in 2009 prices

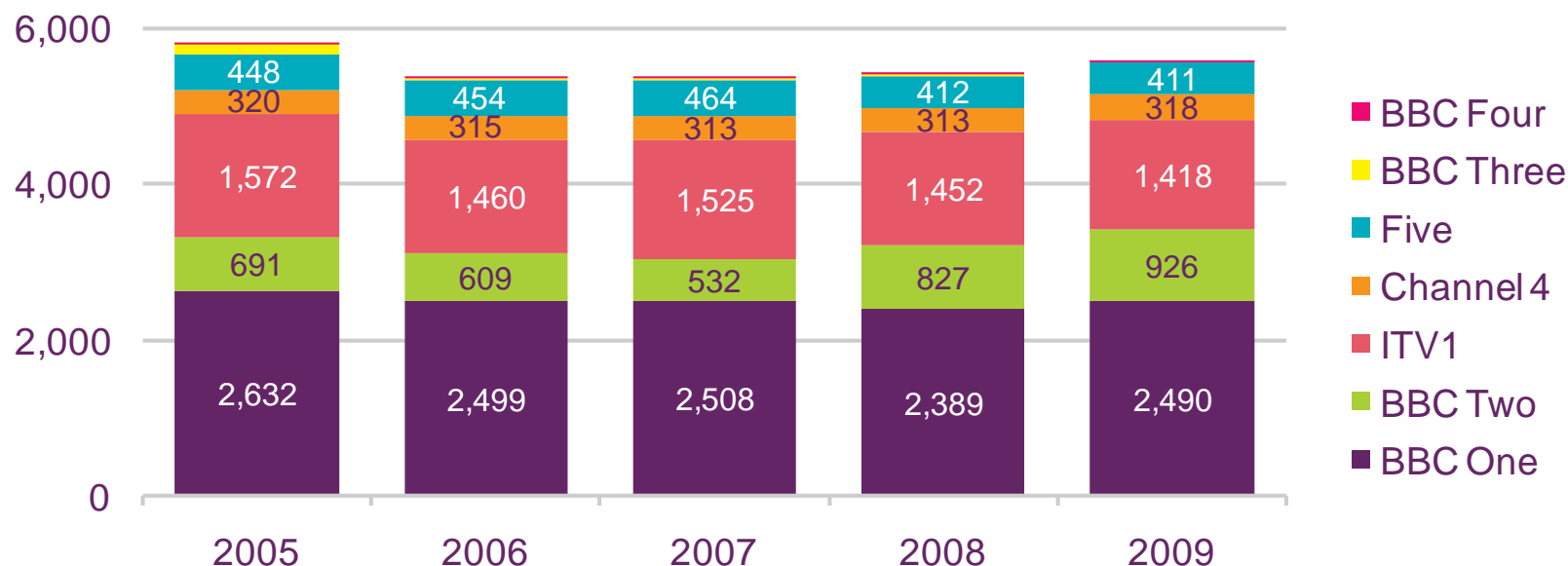
## Summary: UK/national News output

- The volume of national News broadcast across the day from 2005 to 2009 on the five main PSB channels and BBC Three and BBC Four has remained fairly static since 2006, increasing by an average of just 1% a year to reach 5,604 hours in 2009 (See Figure C24).
  - The volume of national News on BBC Two showed an increase of 74% since 2007 as a result of an increase in the volume of hours simulcast from the BBC News channel in the night-time.
  - Between 2005 and 2009, costs reduced by £39m or an average of 5% per annum from £210m to £171m in 2009.
- After a dip in 2006 and 2007, the volume of national News in peak time rose in 2008 and 2009 to reach 925 hours, almost back to its 2005 level (928 hours). The reduction between 2005 and 2006 was due to the removal of the *7 O'clock News* bulletin on BBC Three. On ITV1 a rise of 96% from 2005 to 2009 occurred as a result of the return of *News At Ten* to a regular peak time slot in 2008 (See Figure C25).
- Expenditure on News programmes in peak time rose by about a quarter from £61m in 2005 to £76m in 2009, reflecting the changes in the scheduling of ITV's *News At Ten*.

*Note: The BBC digital channels, BBC News and BBC Parliament are not included in Figures C22 to C25 but almost all of their output consists of News and parliamentary News, which totalled 16,500 hours in 2009.*

**Fig C24 Volume of hours of UK/national News, all day, 2005 - 2009**

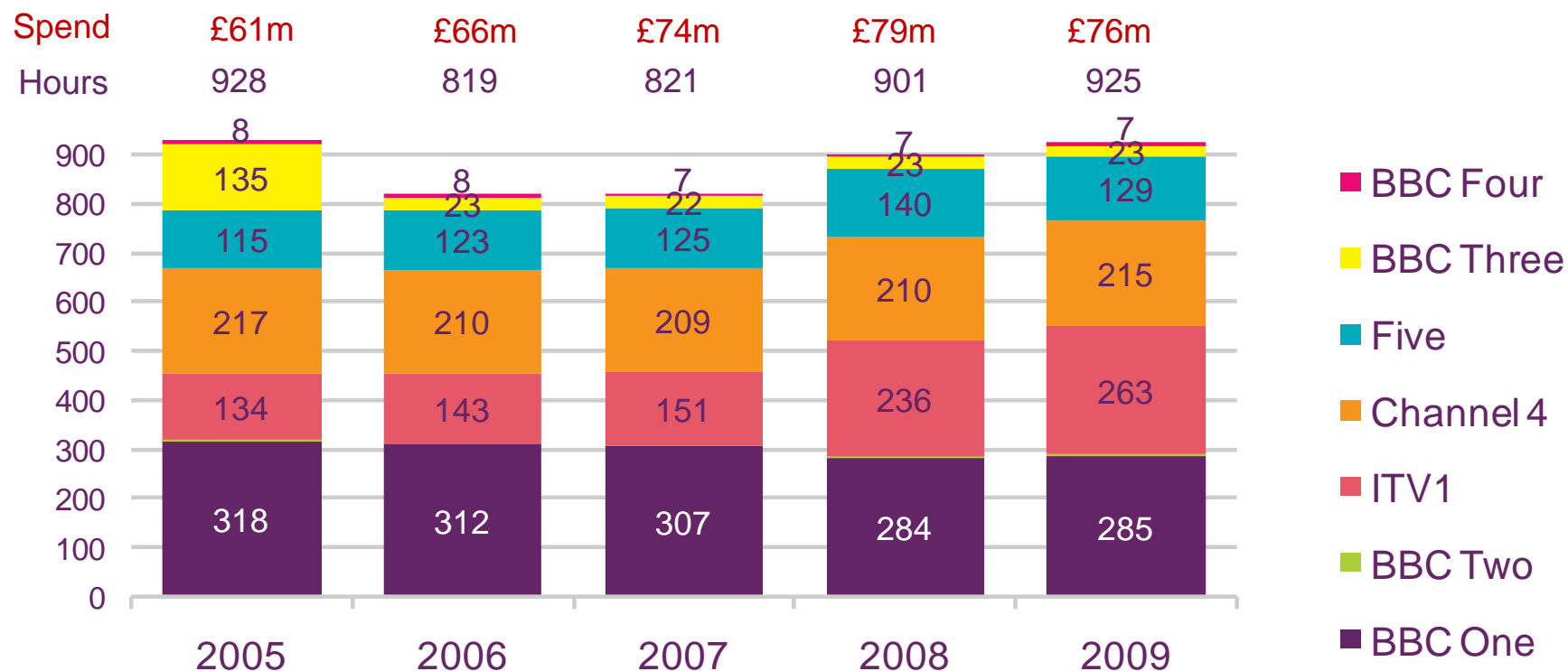
Spend	£210m	£186m	£180m	£173m	£171m
Hours	5,817	5,377	5,380	5,438	5,604



Source: Ofcom/broadcasters

Note: UK/national News refers to network News and excludes non-network News (referred to as nation/regions News in this report). Spend is given in 2009 prices

## Fig C25 Volume of hours of UK/national News, peak time, 2005-2009



Source: Ofcom/broadcasters

Note: UK/national News refers to network News and excludes non-Network news .

Spend is given in 2009 prices

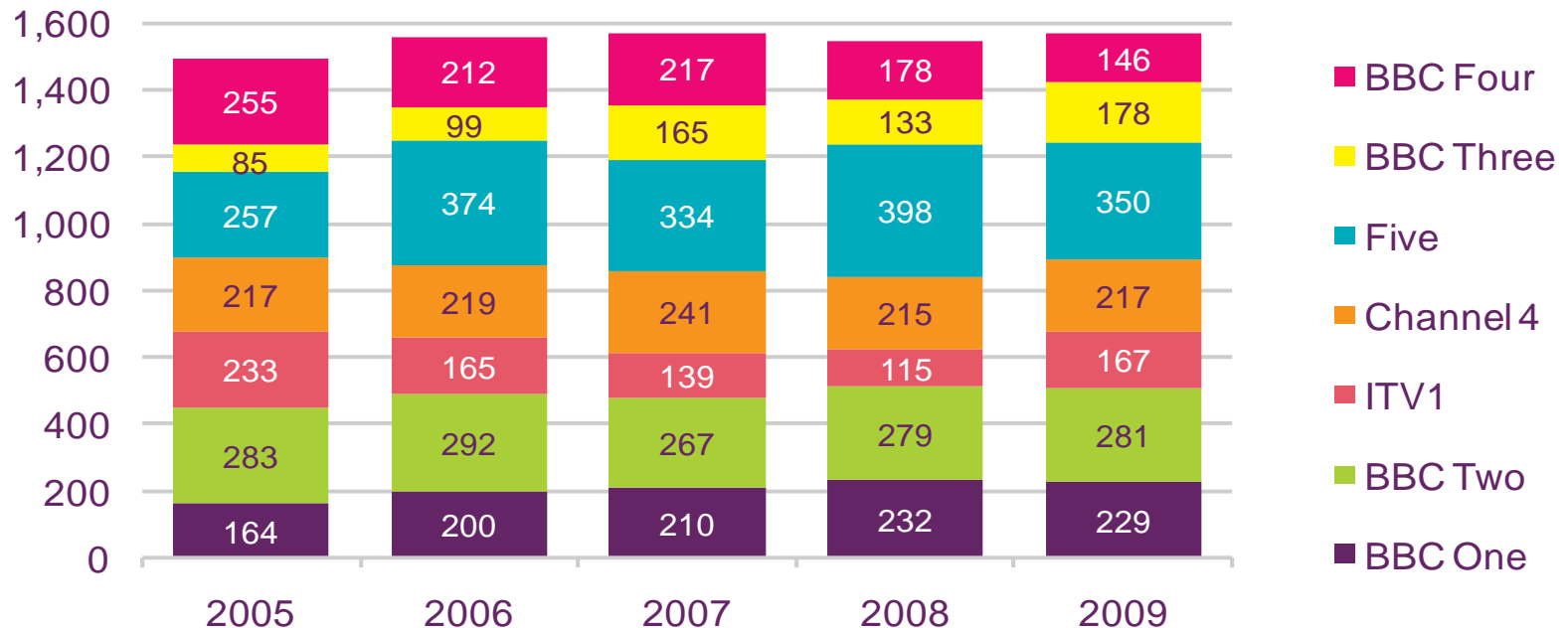


## Summary: Current Affairs output

- The volume of Current Affairs programmes broadcast across the day remained relatively stable from 2006, reaching 1,568 hours in 2009 (See Figure C26).
  - Increases year-on-year on ITV1 and BBC Three were offset by reductions on BBC Four, and on Five while on other PSB channels the levels were static in both 2008 and 2009.
- The costs of Current Affairs programmes fell by an average of 7% per year from £105m in 2005 to £78m in 2009.
- Peak time Current Affairs volumes remained constant over the five years with no significant changes on any of the five main PSB channels and BBC Three and BBC Four, although programme costs have been trimmed by an average of 5% across the period (See Figure C27).
- The total spend on peak time Current Affairs programmes in 2009 was £49m.

## Fig C26 Volume of hours of Current Affairs, all day, 2005 - 2009

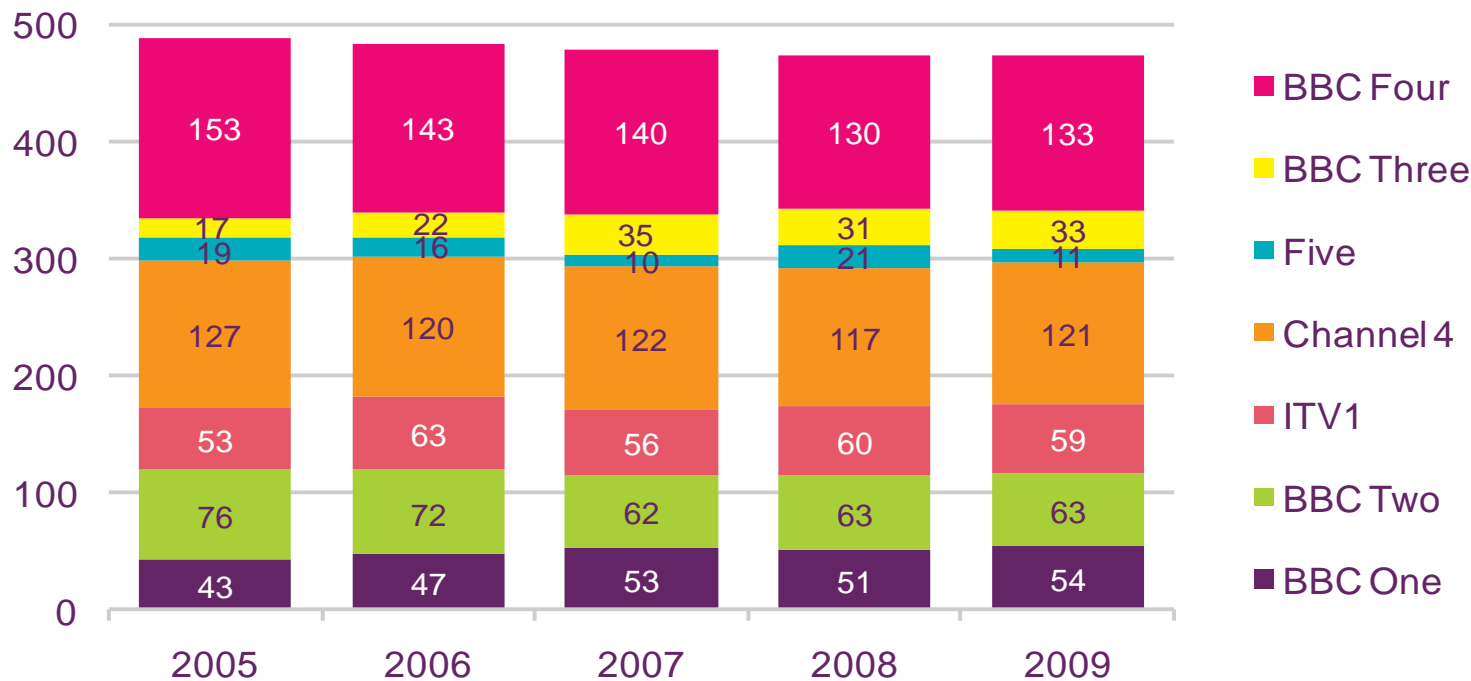
Spend	£105m	£97m	£89m	£80m	£78m
Hours	1,494	1,561	1,573	1,550	1,568



Source: Ofcom/broadcasters  
 Note: Spend is given in 2009 prices

## Fig C27 Volume of hours of Current Affairs, peak time, 2005 -2009

Spend	£59m	£60m	£56m	£50m	£49m
Hours	488	483	478	473	474



Source: Ofcom/broadcasters

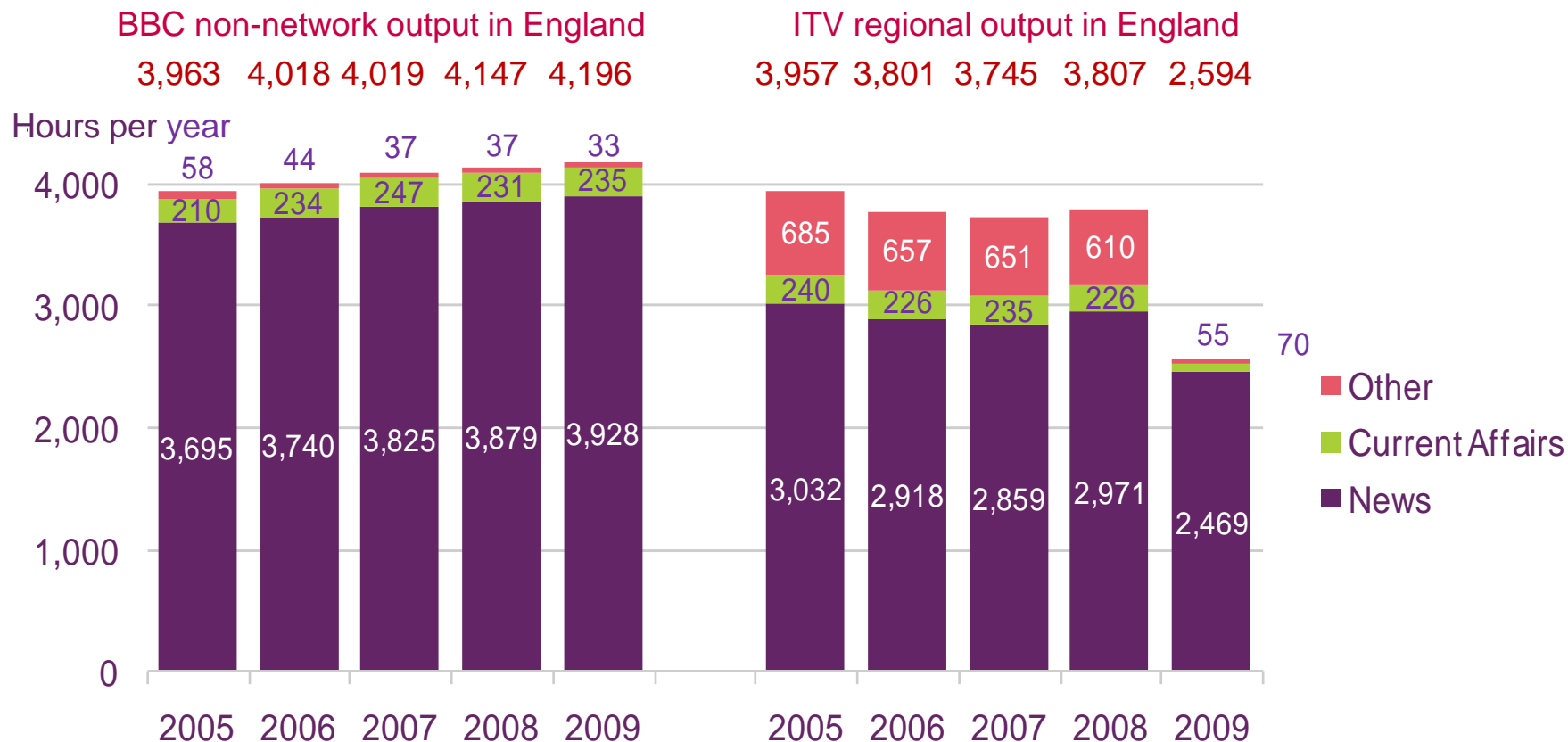
Note: Spend is given in 2009 prices

## Summary: Non-network output in the nations and English regions

- **England** (Figure C28)
  - BBC hours increased by 6%, from 3,963 hours in 2005 to 4,196 hours in 2009. The volume of regional News increased by 6% to 3,928 hours.
  - On ITV volumes fell 34% over 5 years and total hours of News in the English regions fell from 2,971 hours in 2008 to 2,469 hours in 2009 as a result of the agreed policy decision to reduce non-network output across the English regions (and Nations) outside peak time and concentrate resources in peak.
- **Scotland** (Figure C29)
  - BBC hours fell 3% over 5 years.
  - STV's volume fell in 2006-07 but by 2009 had returned to the 2005 level (840 hours in 2009, compared with 835 hours in 2005). Non-network News fell from 600 hours in 2008 to 470 hours in 2009 but there was a rise in Non-news programmes of 83% between 2008 and 2009 as a result of the decision to opt-out of ITV Networked programmes and substitute higher volumes of home-grown STV productions.
- **Wales** (Figure C30)
  - Hours on BBC Wales fell from 824 to 696 hours over 5 years. News and Current Affairs output dropped from 500 to 420 hours (16%); Other programming fell from 324 to 276 hours.
  - ITV Wales' hours fell 32% over 5 years. News was down by 21 hours; Current Affairs was stable at about 40 hours; Other output was down from 169 to 35 hours.
- **Northern Ireland** (Figure C31)
  - BBC hours fell 3% from 631 in 2005 to 612 hours in 2009. News was up by 19%; Current Affairs was stable; while Other programmes were down 35%.
  - UTV hours fell 32% over 5 years. News was down 132 hours; Other was down from 119 hours to 73 hours in 2009 while Current Affairs rose a little, from 28 hours in 2005 to 39 hours in 2009.

*NOTE: Information on hours and expenditure on network production outside London and compliance with these quotas is included in a separate report published alongside the PSB Annual Report 2010 (please see 'Compliance Reporting: PSB Report 2010 – Information Pack G')*

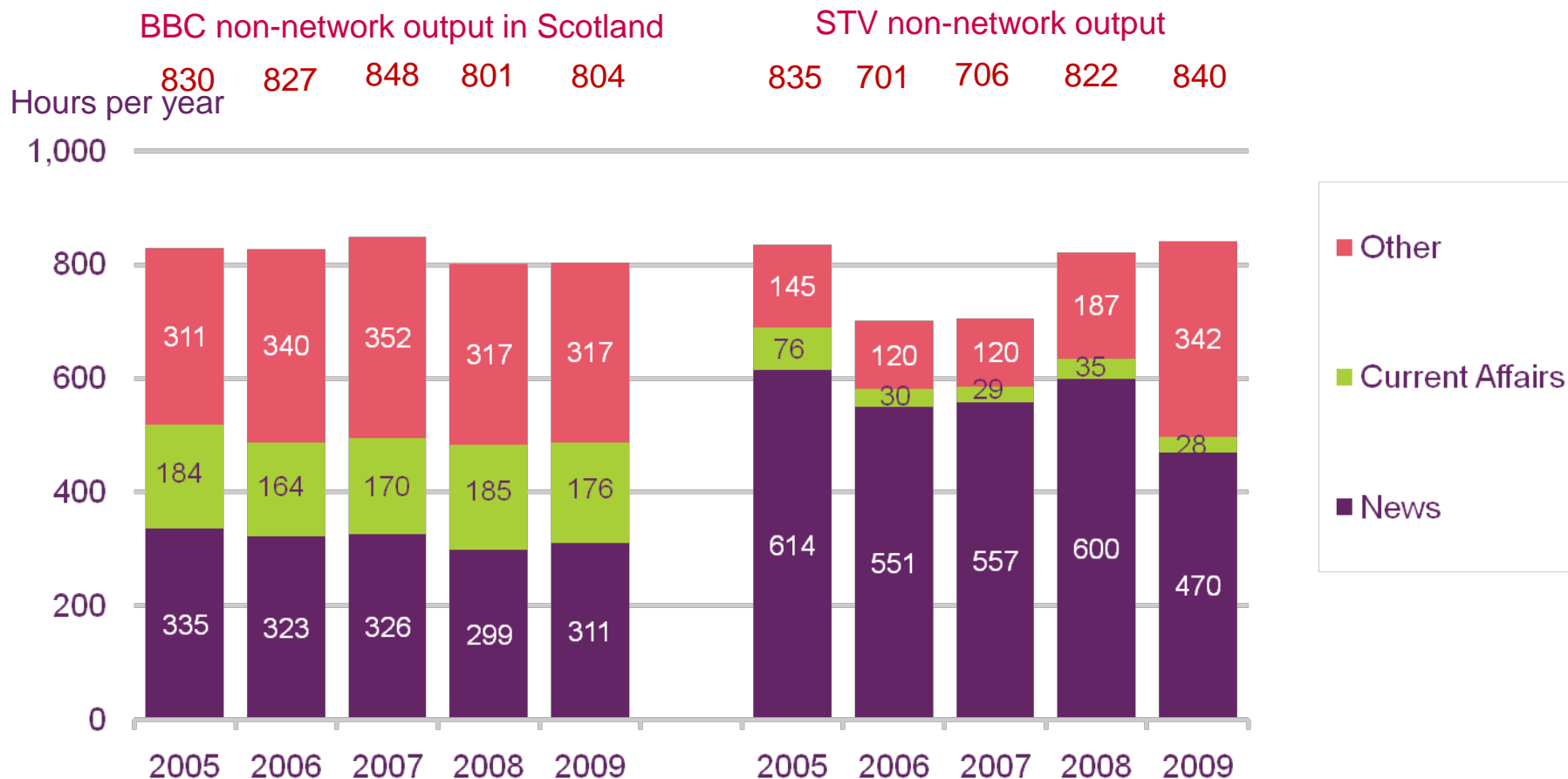
## Fig C28 Non-network output in England, 2005-2009



Source: Ofcom/broadcasters

Note: Figures exclude repeats

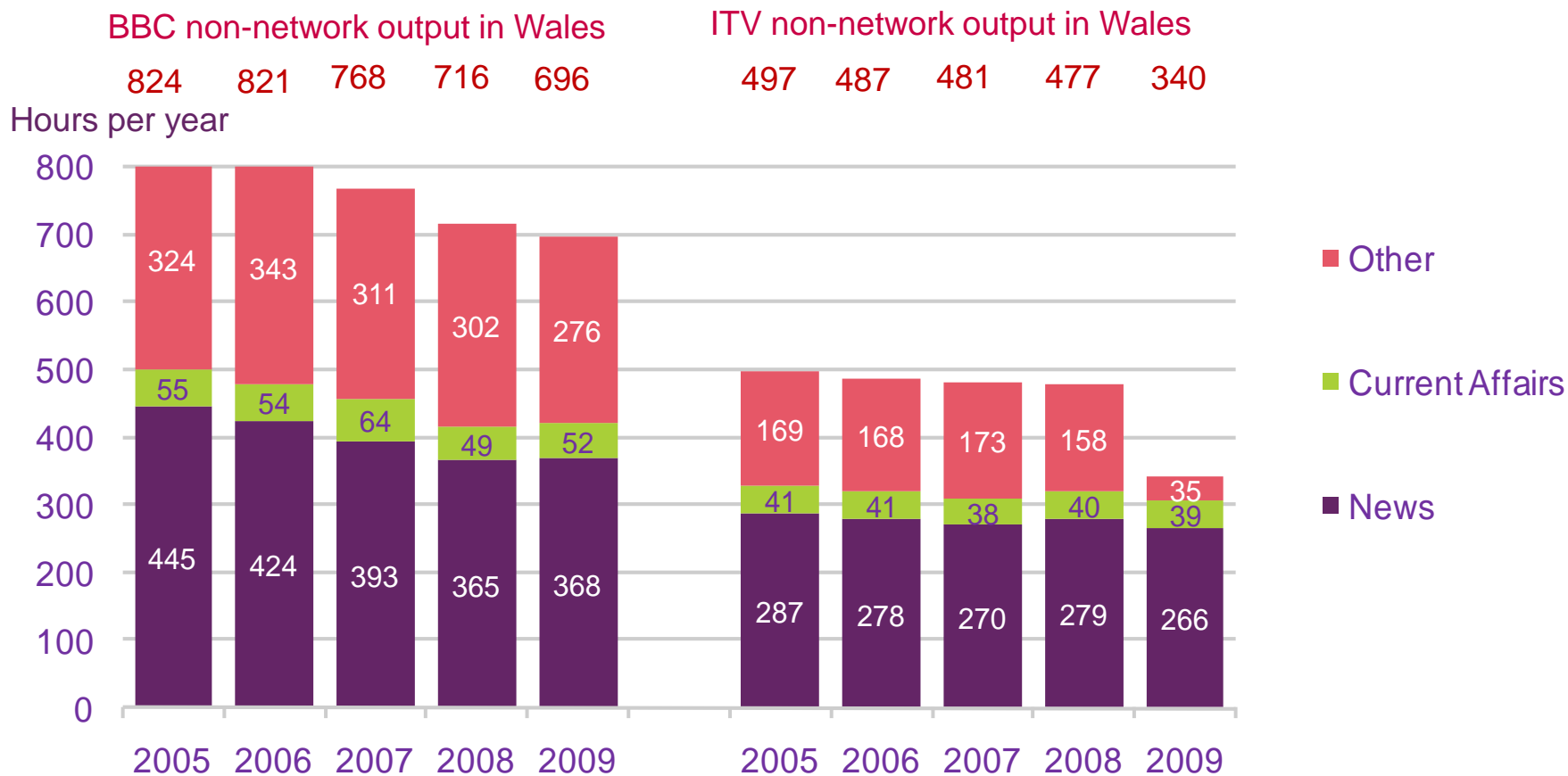
## Fig C29 Non-network output in Scotland, 2005-2009



Source: Ofcom/broadcasters

Note: Figures exclude repeats and gaelic programming

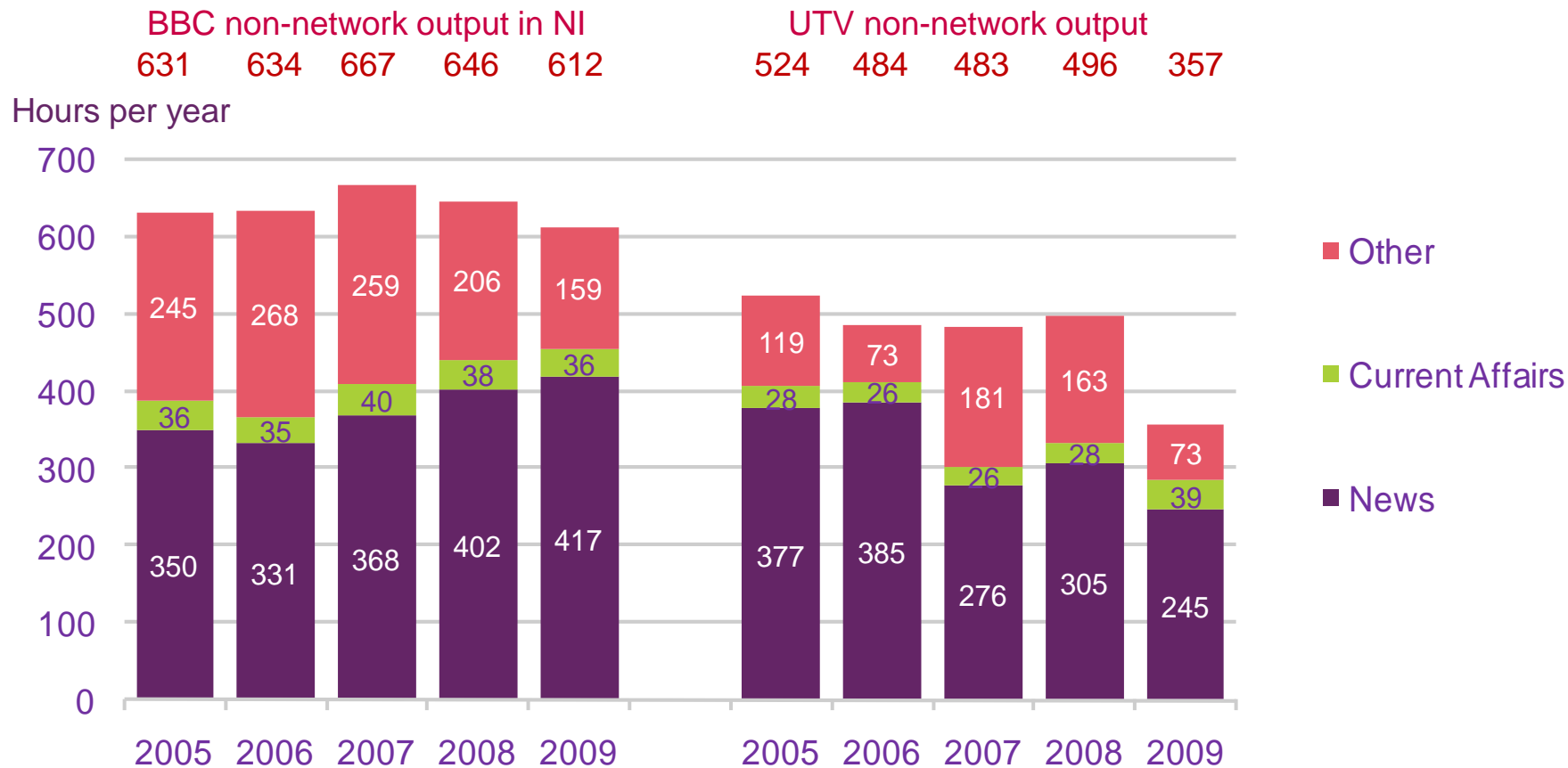
## Fig C30 Non-network output in Wales, 2005-2009



Source: Ofcom/broadcasters

Note: Figures exclude repeats

## Fig C31 Non-network output in Northern Ireland, 2005-2009



Source: Ofcom/broadcasters

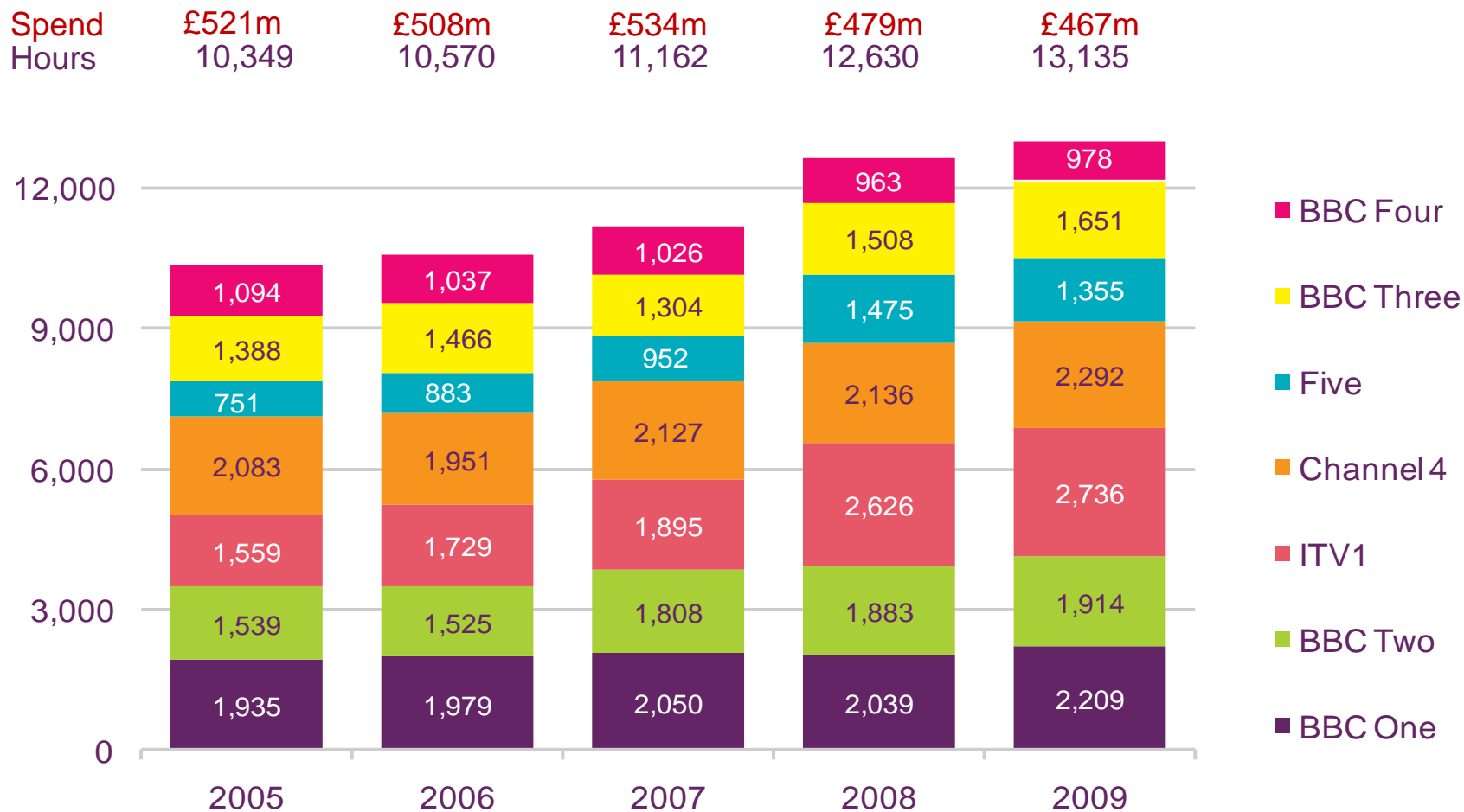
Note: Figures exclude repeats



## Summary: Factual output

- Programmes within the Factual genre cover a wide range - from Specialist Factual output which includes Nature & Wildlife documentaries, History, Science & Technology and Other documentaries; to lighter material such as Magazine shows, Leisure & Hobbies (including Lifestyle programmes); and Factual Entertainment.
- Volumes of all Factual programmes aggregated across the five main PSB channels and BBC Three and BBC Four have increased by an average of 6% between 2005 and 2009, reaching a total of 13,135 hours in 2009 (See Figure C32).
  - With the exception of BBC Four, the volume of Factual programmes rose on all channels, notably on ITV1 and Five which showed average increases between 2005 and 2009 of 15% and 16% respectively.
- While overall volumes have gone up, expenditure on Factual output has fallen by an average of 3% a year - from £521m in 2005 to £467m in 2009.

## Fig C32 Factual output 2005-2009, all day



Source: Ofcom/broadcasters

Note: Spend is given in 2009 prices

## Summary: Factual output by sub-genre

- Figure C33 shows volumes of all types of Factual programmes\* have increased since 2006 with the largest average percentage rise per year (10%) being in the 'Other Factual' category (which covers Leisure & Hobbies and factual Magazine programmes).
  - ITV1 dominated the 'Other Factual' genre, broadcasting a total of 2,499 hours (53% of the total) in 2009 with daytime programmes such as *This Morning*, *The Jeremy Kyle Show* and *Loose Women*; as well as programmes in the night hours, including repeats, contributing a significant proportion to this figure.
  - Specialist Factual programmes featured heavily in almost all PSB channels' schedules and output included history, nature & wildlife and general documentaries within this genre. Volumes increased year-on-year on all channels except Five. However, while there were some modest increases in the levels of first run originations on most channels, the main rise was in the volume of repeats.
  - Volumes of Factual Entertainment programmes (popular factual material, including reality shows, and docusoaps) rose by 4% on average per year with the largest average percentage increases being on BBC Two (19%) and BBC Three (20%). The rises dated from 2008 as a result of adding some new series, as well as repeats, particularly during the daytime on BBC Two.
- In aggregate, expenditure by the five main PSB channels and BBC Three & Four on Factual Entertainment output rose by an average per year of 7% from £127m in 2006 to £154m in 2009 while spend on other Factual sub-genres fell over the same period (See Figure C33).

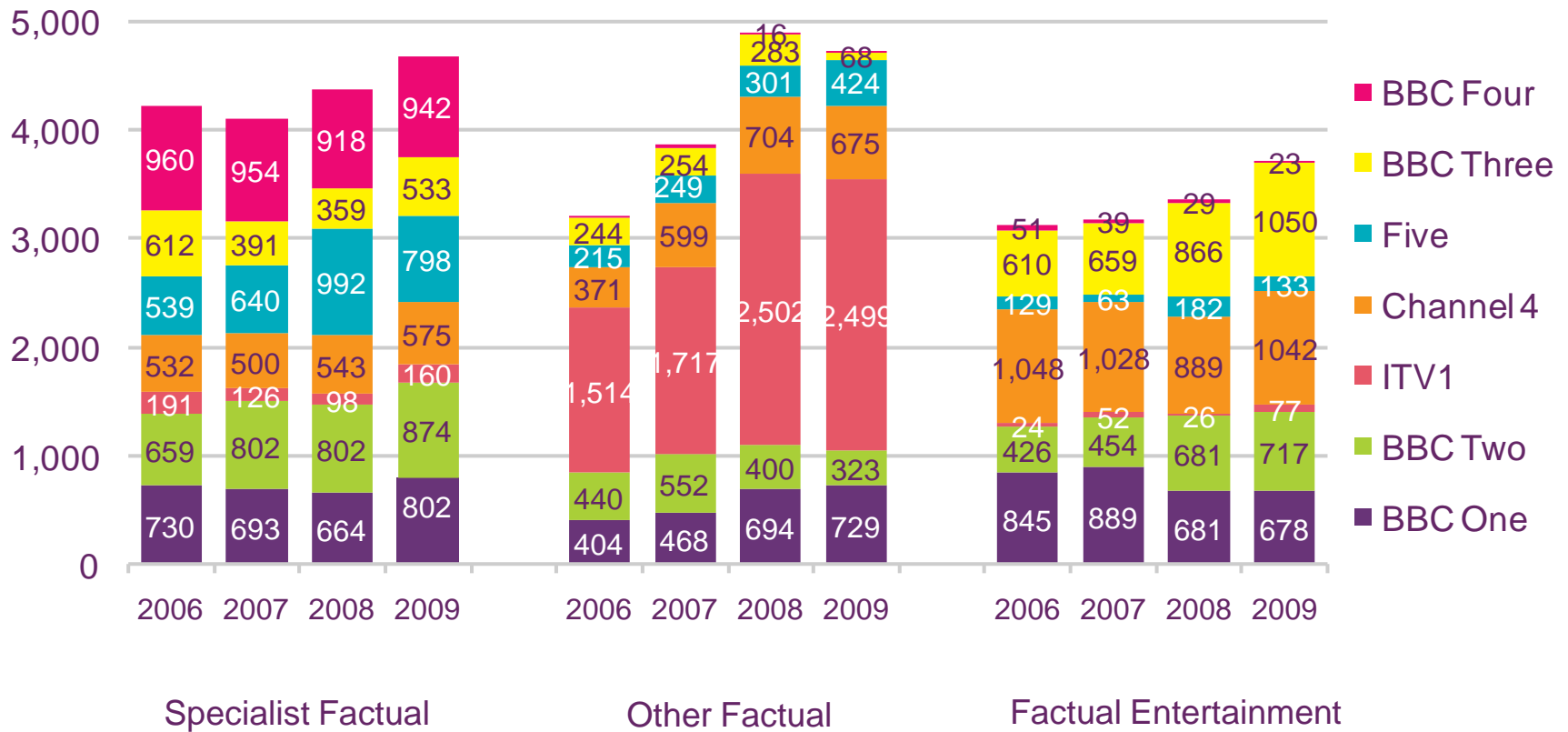
\* Data for Factual programming by sub-genre is not available in 2005, therefore data is reported from 2006e.

## Fig C33 Factual output 2006-2009\*, by sub-genre



£228m   £204m   £175m   £166m   £154m   £158m   £157m   £147m   £127m   £172m   £147m   £154m  
 4,223   4,106   4,376   4,684   3,214   3,872   4,900   4,731   3,133   3,184   3,354   3,720

Hours per year, all day hours



Source: Ofcom/broadcasters

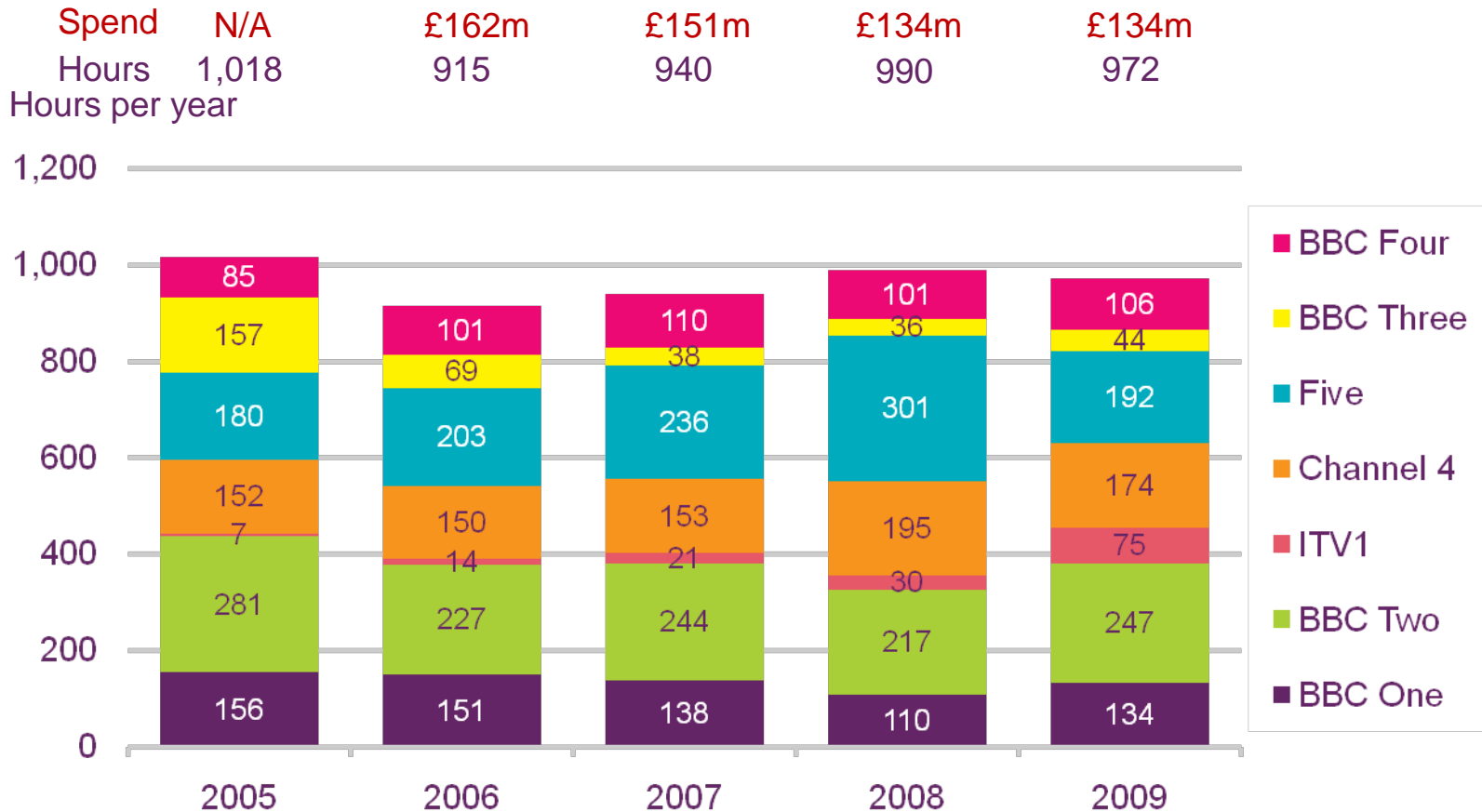
\* Data for 2005 by sub-genre is not available

Note: Spend is given in 2009 prices

## Summary: Specialist Factual – peak time first run originated output

- While previous figures have considered volumes of Factual output in their totality – including first run hours, repeats, original productions and acquisitions, Figure C34 looks at first-run originated Specialist Factual only. In other words, programmes produced or commissioned by the broadcasters themselves, rather than bought-in or repeated material.
- Hours of Specialist Factual programmes have reduced in peak time by an average of 1% a year since 2005 with reductions being seen on all BBC channels with the exception of BBC Four. Volumes broadcast by commercial PSB channels in peak time have risen over the same period partly because ITV1 has replaced some originated drama in peak time with more factual output (including series such as *Countrywise* and documentaries like *Islands of Britain*).
- Expenditure on Specialist Factual programmes remained static year-on-year at £134m, although this represented a 17% reduction compared with 2006.

## Fig C34 First-run, peak time originated Specialist Factual output, 2005 - 2009



Source: Ofcom/broadcasters

Note: Spend is given in 2009 prices

## Summary: Arts, Education and Religion/Ethics

- The volume of Arts & Classical Music in the all-day schedule fell by 9% between 2005 and 2009 and spend on Arts programmes fell 31% over the same period. Hours of Arts in peak time dropped 16% and spend fell 25%, although volumes have been relatively constant since 2006 and spend on the Arts increased by £5m year-on-year to £38m in 2009. BBC Four is the largest contributor in this genre, accounting for 64% of the hours of output overall (See Figure C35).
- Figure C36 shows that Formal Education - principally Schools programmes on the BBC and Channel 4 and the BBC's Learning Zone output - fell by 59%. Cutbacks in the number of repeats of Schools programmes shown on BBC Two and CBBC were the primary reasons for the reduction.
- Within the Religion/Ethics genre, programmes cover a wide cross-section of different forms of religion (of all faiths) and other beliefs. It also includes programmes about moral, ethical and philosophical principles and religious inspiration. While the volume and expenditure on these types of programmes in peak time held steady in 2008 and 2009 at about 70 hours and £7m in spend, the volume across all hours fell in each of the last 4 years and by 24% (87 hours) in total over the period. Spend fell by £10m from 2005, although the level was maintained at £15m over the last two years (See Figure C37).

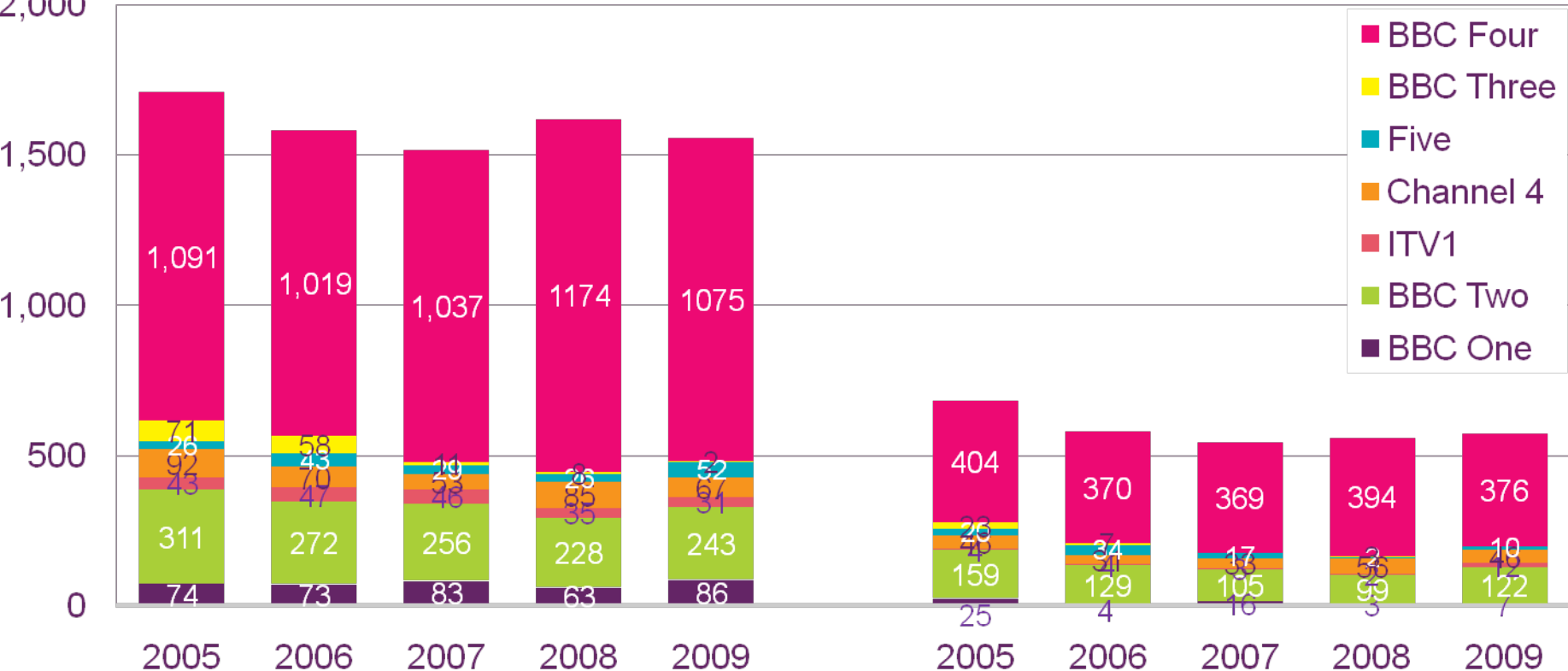
# Arts, Education and Religion/Ethics



**Fig C35 Arts & classical music output hours, 2005- 2009**

	All day					Peak time				
Spend	£72m	£66m	£59m	£48m	£50m	£51m	£45m	£41m	£33m	£38m
Hours	1,708	1,582	1,515	1,619	1,556	681	579	543	559	573

Hours per year  
2,000



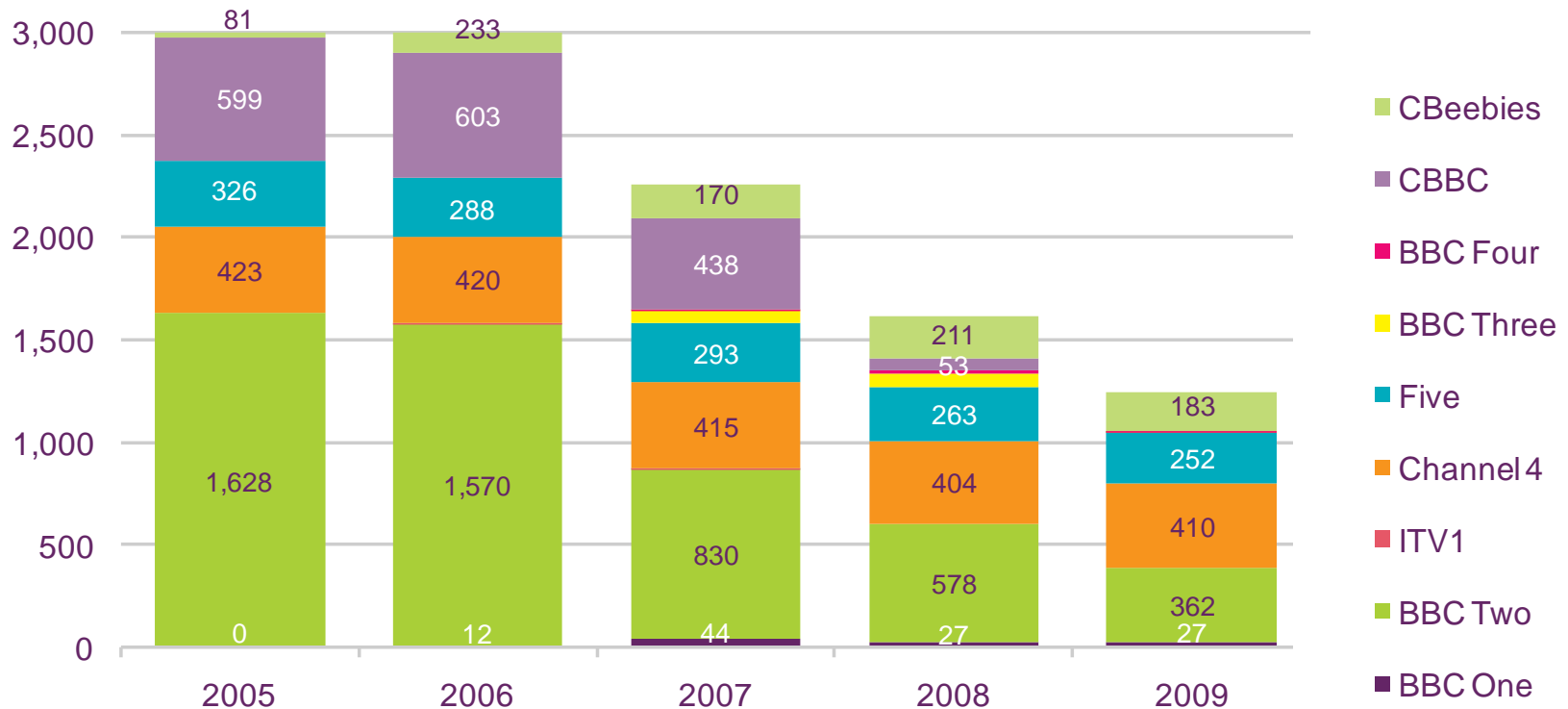
Source: Ofcom/broadcasters  
Note: Spend is given in 2009 prices



## Fig C36 Formal Education output hours 2005-2009

Spend	£23m	£26m	£29m	£25m	£26m
Hours	3,057	3,130	2,260	1,618	1,240

Hours per year, all day hours



Source: Ofcom/broadcasters

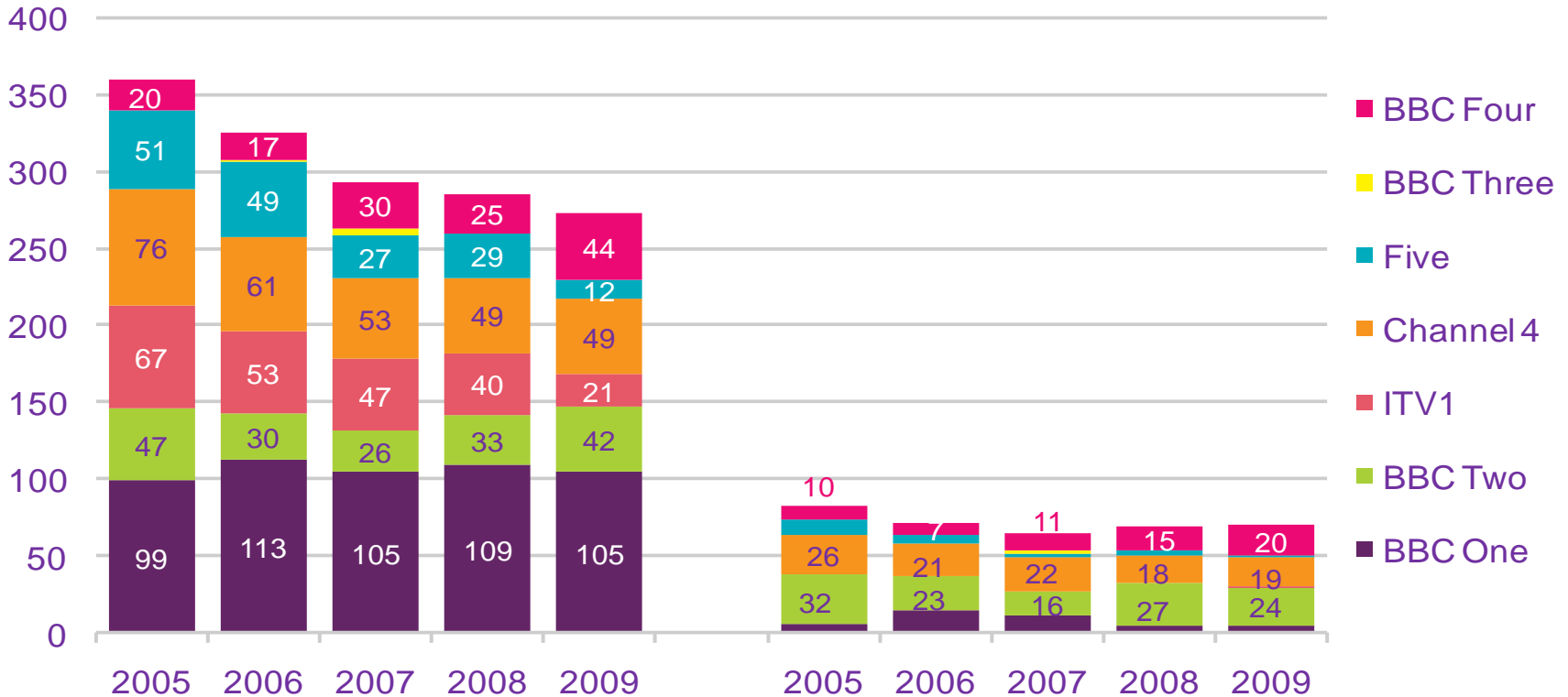
Note: Formal Education programmes include Schools and the BBC Learning Zone. Other programmes from all broadcasters across a variety of genres include Learning Support materials. Spend is given in 2009 prices



**Fig C37 Religion/Ethics programming output hours, 2005-2009**

Spend	£25m	£20m	£18m	£15m	£15m	£10m	£9m	£8m	£7m	£7m
Hours	360	325	293	285	273	83	71	65	69	70

Hours per year



All hours

Peak time

Source: Ofcom/broadcasters

Note: Spend is given in 2009 prices

## Summary: S4C output

- Total hours of Welsh language programmes on S4C increased by 27% between 2005 and 2009 to 5,696 hours in 2009 (See Figure C38).
  - Commissioned programmes from independent producers rose 11% to 1,432 hours and “Statutory” hours which the BBC provided increased by 24% to 672 hours.
  - Commissions from the BBC went down from 153 hours in 2005 to 13 hours in 2009, while acquired material was cut from 115 hours to 58 hours.
  - Repeats increased by 48% over the period to 3,521 hours.
- Repeats made up the majority of Welsh language programming in 2009 (62%) and independent commissions comprised 25%; BBC Statutory hours 12%; and acquisitions 1% of total output (See Figure C38). Note that as the BBC Statutory hours are not broken down into acquisitions, commissions and repeats, there may be a small number of additional hours to be re-assigned to the repeats category.
- Figure C39 shows the volume of first run originated Welsh language programmes on S4C increased by 6% to reach 2,095 hours by 2009. Of this total, 25% were General Factual programmes and 15% were News and Current Affairs. Originated Children’s programmes made up 19% (400 hours) with Sport comprising 14% (291 hours) and Music and Arts 11% (232 hours). Drama programmes comprised 8% of total originations with Entertainment output making up 6%. As mentioned above, there may be a small number of repeats included within these figures as BBC Statutory hours are included.

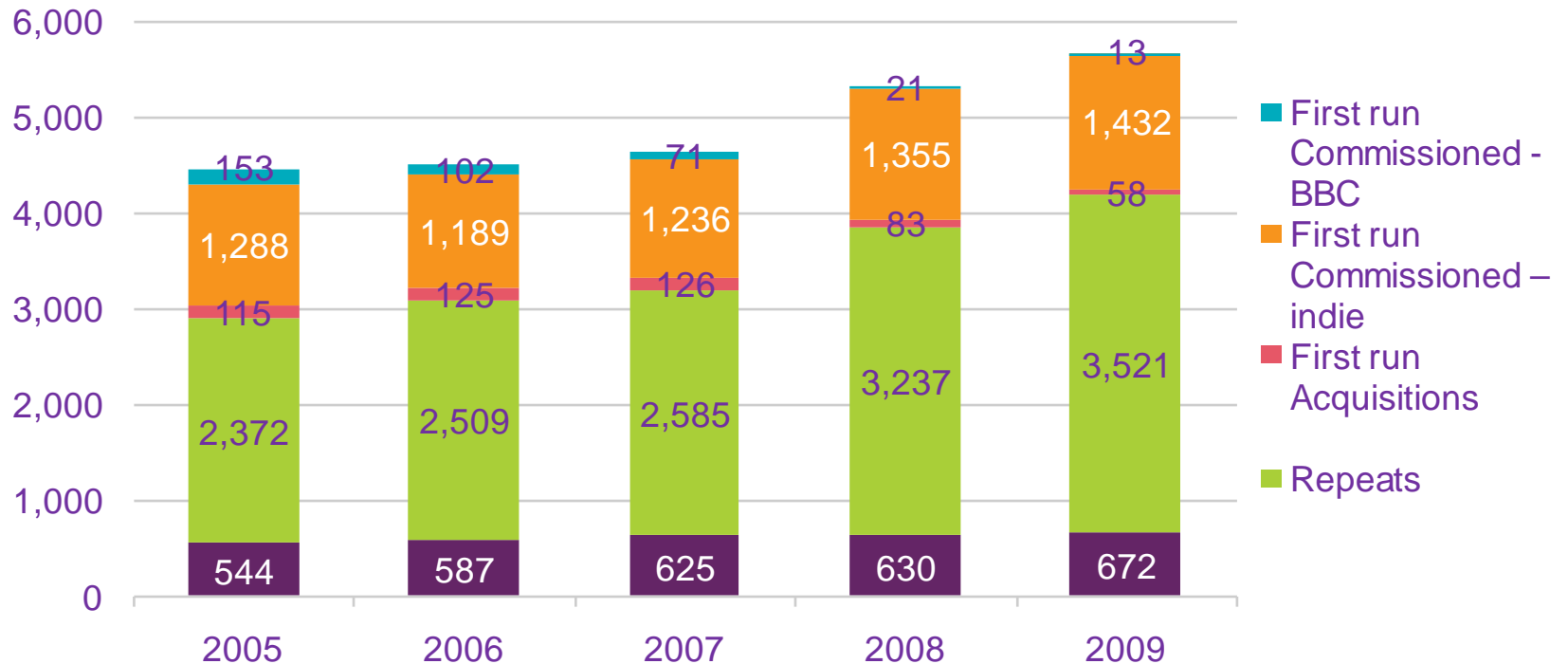
*Note: The Welsh Authority had the statutory responsibility to provide S4C (analogue) and S4C Digidol (digital) services for viewers in Wales. However, the S4C analogue service ceased broadcasting at midnight 30 March 2010 when digital switchover process was completed in Wales. This report focuses on 2009, prior to this change.*



Fig C38 Type of Welsh Language output on S4C

Hours 4,472 4,512 4,643 5,326 5,696

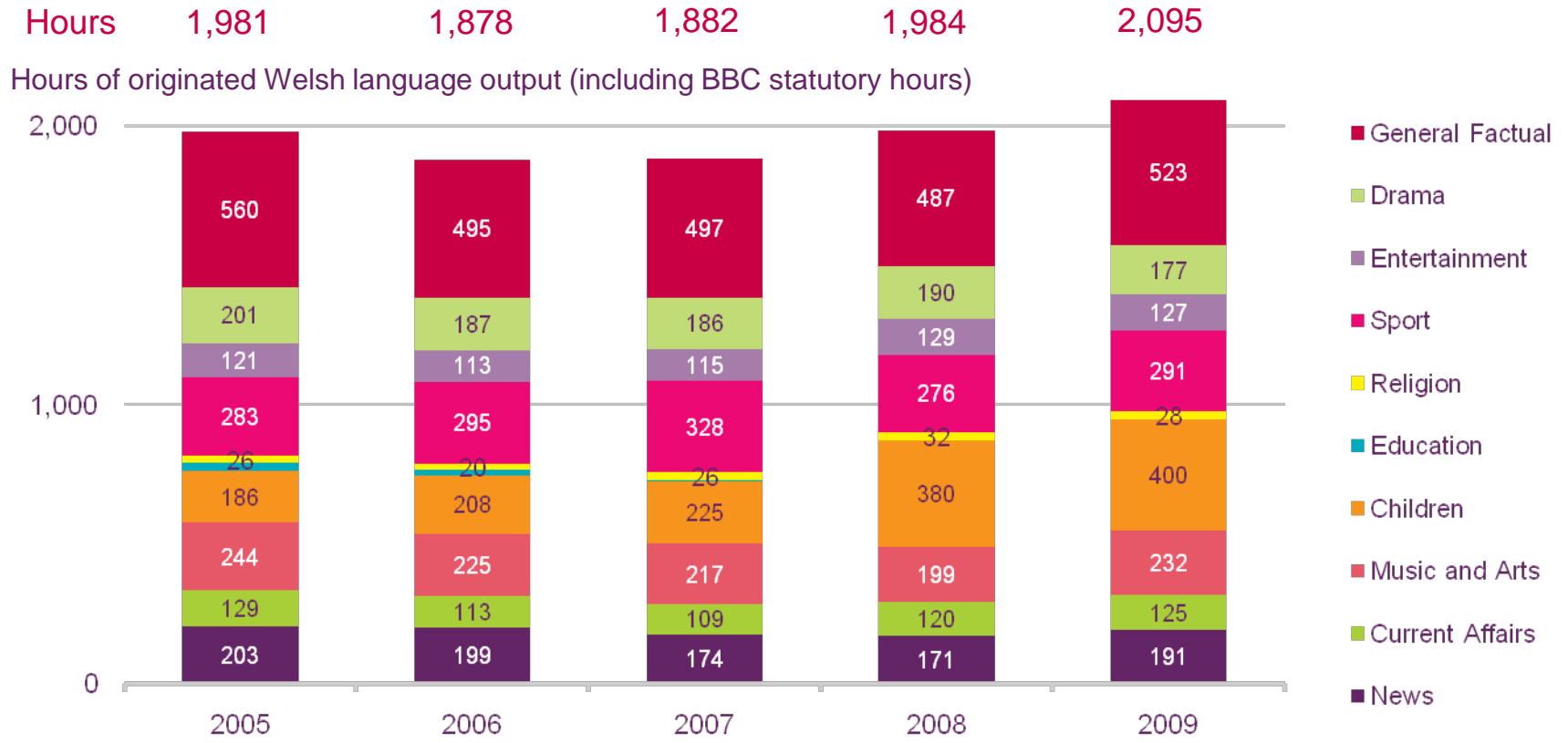
Hours of output per year



Source: S4C (2009)

Notes: The BBC statutory hours are not broken down into acquisitions, commissions or repeats

**Fig C39 Annual hours of first run originated Welsh language output on S4C**



Source: S4C (2009)

Note: Includes BBC statutory hours – these hours are not broken down into acquisitions, commissions or repeats, therefore a nominal number of the hours in this chart may consist of repeated material.

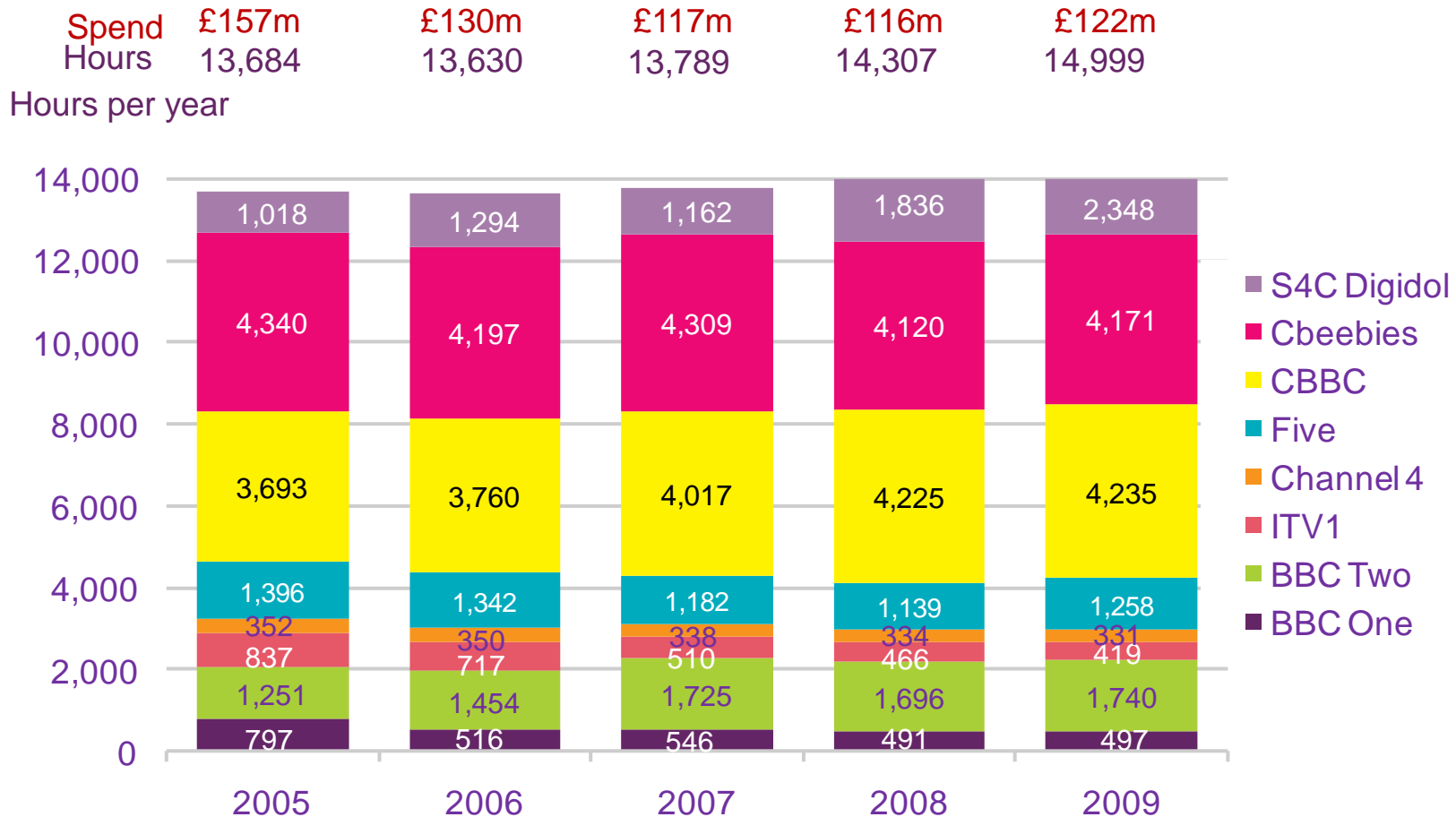
## Summary: Children's PSB output and expenditure

- Total volume of children's output on PSB channels (including S4C) increased by 10% since 2005 to reach 14,999 hours in 2009. Hours rose on BBC Two, CBBC and S4C, but fell on all other channels (See Figure C40). The largest falls were on ITV1, which dropped by 50% to 419 hours and BBC One which decreased by 38% to 497 hours.
- Total spend\* fell by 22% from £157m in 2005 to £122m in 2009. The main decline in spend was on the commercial PSB channels, which decreased by 74% from 2005 to 2009.
- An increase of £6m was seen from 2008 to 2009, due to a £9m increase in spend by the BBC and a £1.5m increase in spend by S4C, offsetting the 27% decrease in spend by the commercial PSB channels over this time. (Note that expenditure by ITV on the CITV channel is excluded from these figures.)
- First run originations fell 14% by volume and 21% by value over the period. Total expenditure stood at £103m in 2009, up £5m from £98m in 2008 but still lower than the amount spent in 2005 of £131m. Figure C41 shows that hours were down on most channels apart from S4C, BBC Two and CBeebies. Of total PSB originations, S4C's contribution was 35% in 2009, up from 11% in 2005.
- Figure C42 shows that the proportion of repeats on all channels under review increased to 88% of total output – a rise of 5 percentage points since 2005. Originations fell to 10% by 2009 with bought-in material accounting for 2%.
- More Pre-school programmes are broadcast than any other sub-genre, comprising 42% of the total in 2009. Animations made up 19% of total output, Entertainment 18%, Drama 10% and Factual programmes 9% (See Figure C43).

\*Network spend data reported earlier in this summary excludes the contribution of S4C, which is included here.



## Fig C40 Children's PSB Output 2005 – 2009, hours per year

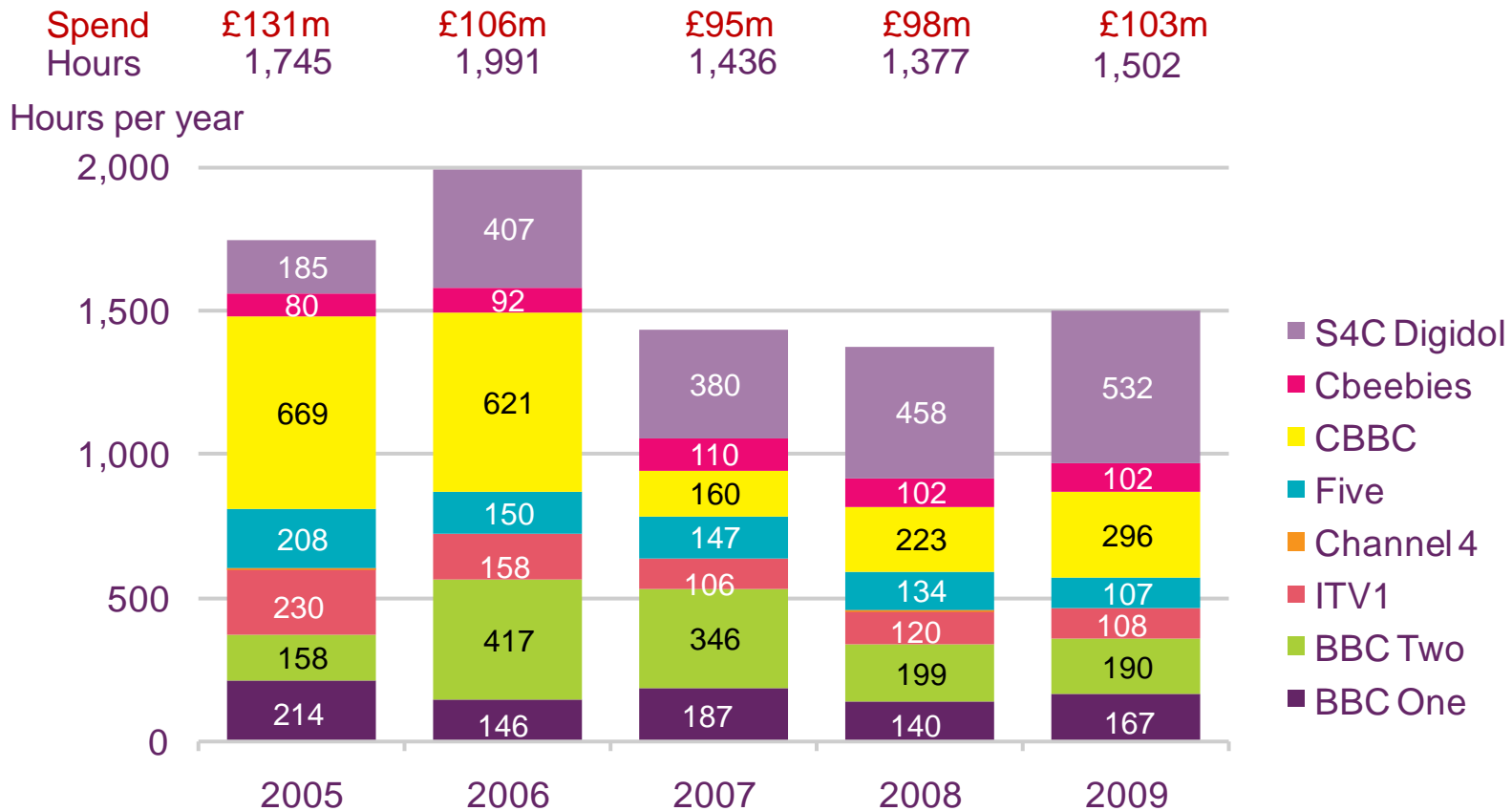


Source: Ofcom/broadcasters

Note: Spend is given in 2009 prices. Output and spend on the CITV channel is excluded.



**Fig C41 Children's PSB Output 2005 – 2009, first run UK originated hours per year**



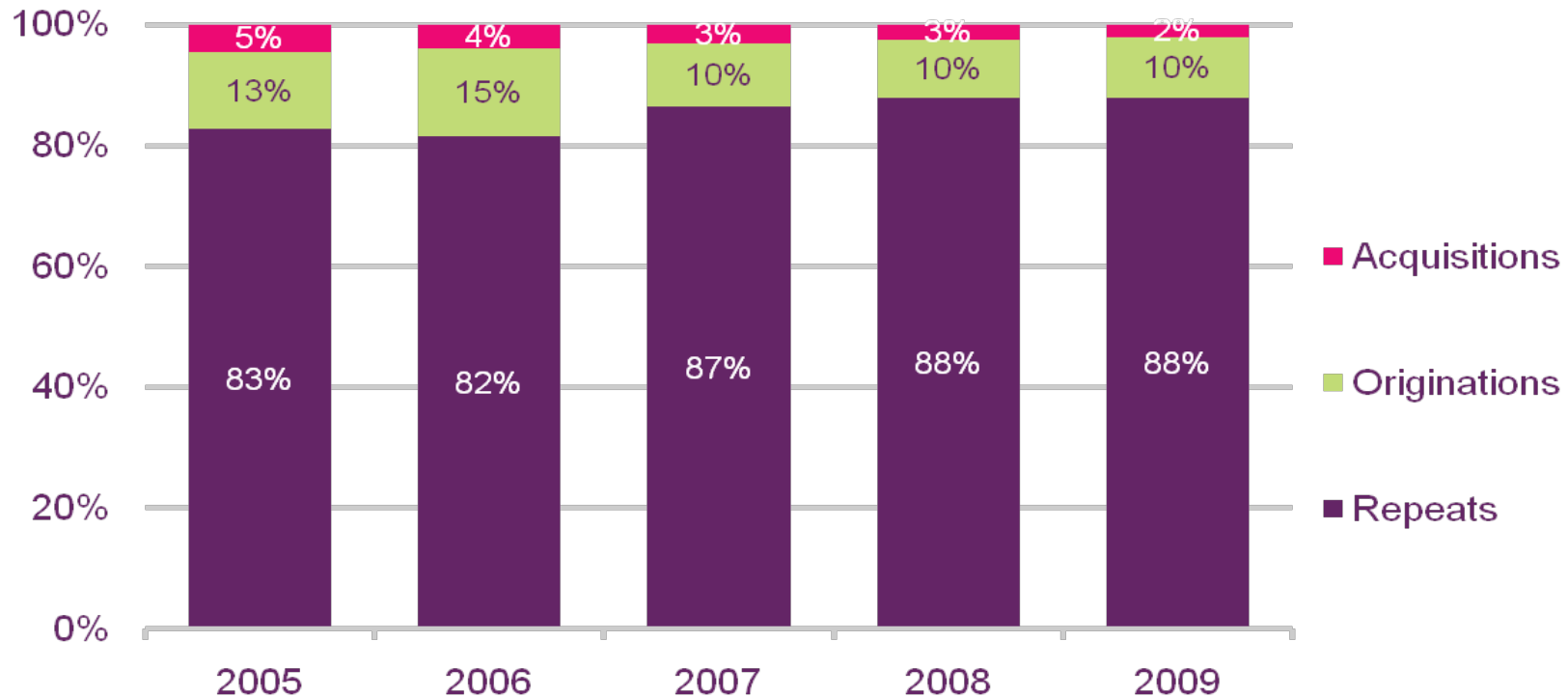
Source: Ofcom/broadcasters

Note: Spend is given in 2009 prices. Output and spend on the CITV channel is excluded.



**Fig C42 Children's PSB Output\* 2005 – 2009, proportion of output, originations, acquisitions and repeats**

% of Children's output



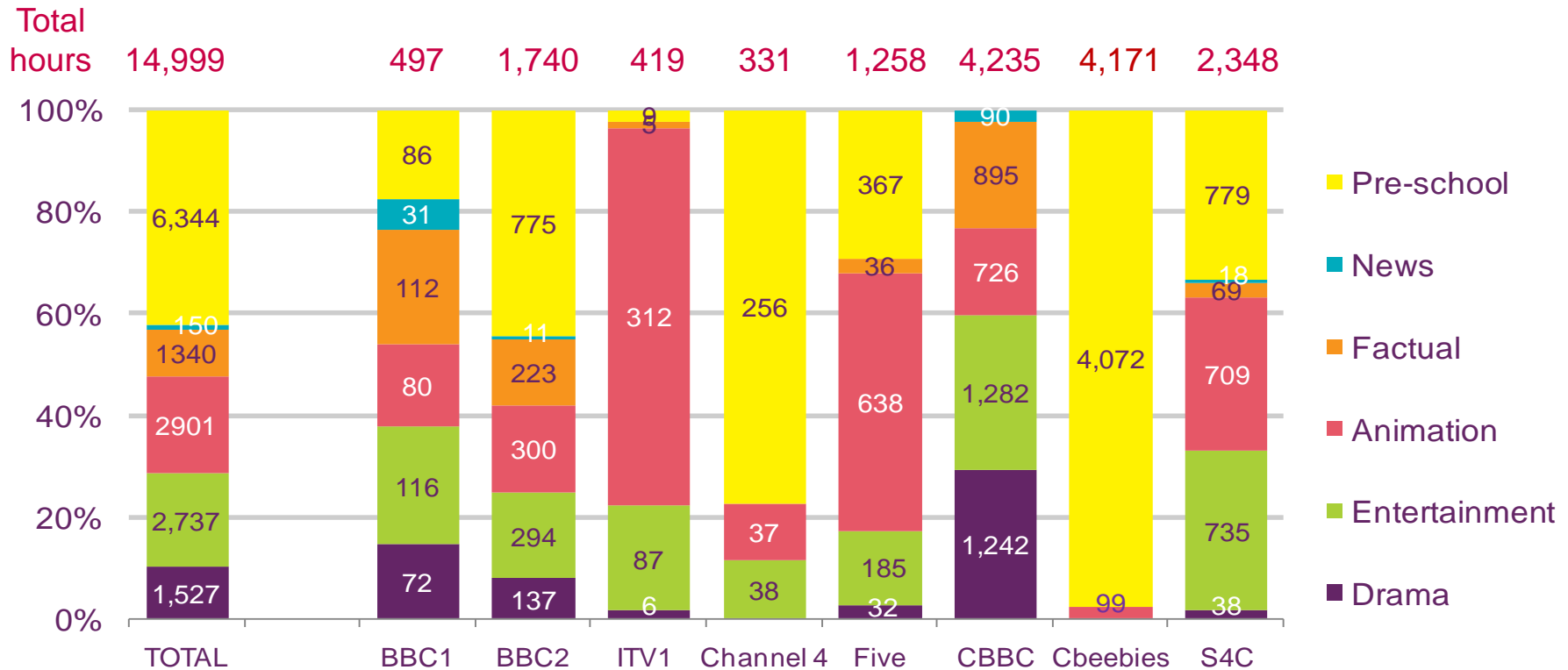
Source: Ofcom/broadcasters

Note: Spend is given in 2009 prices

\*PSB Channels included: BBC One, BBC Two, ITV1, Channel 4, Five, CBBC, Cbeebies, S4C Digidol. Excluded: CITV.



## Fig C43 Children's Output by sub-genre 2009



Source: Ofcom/broadcasters

Note: Spend is given in 2009 prices

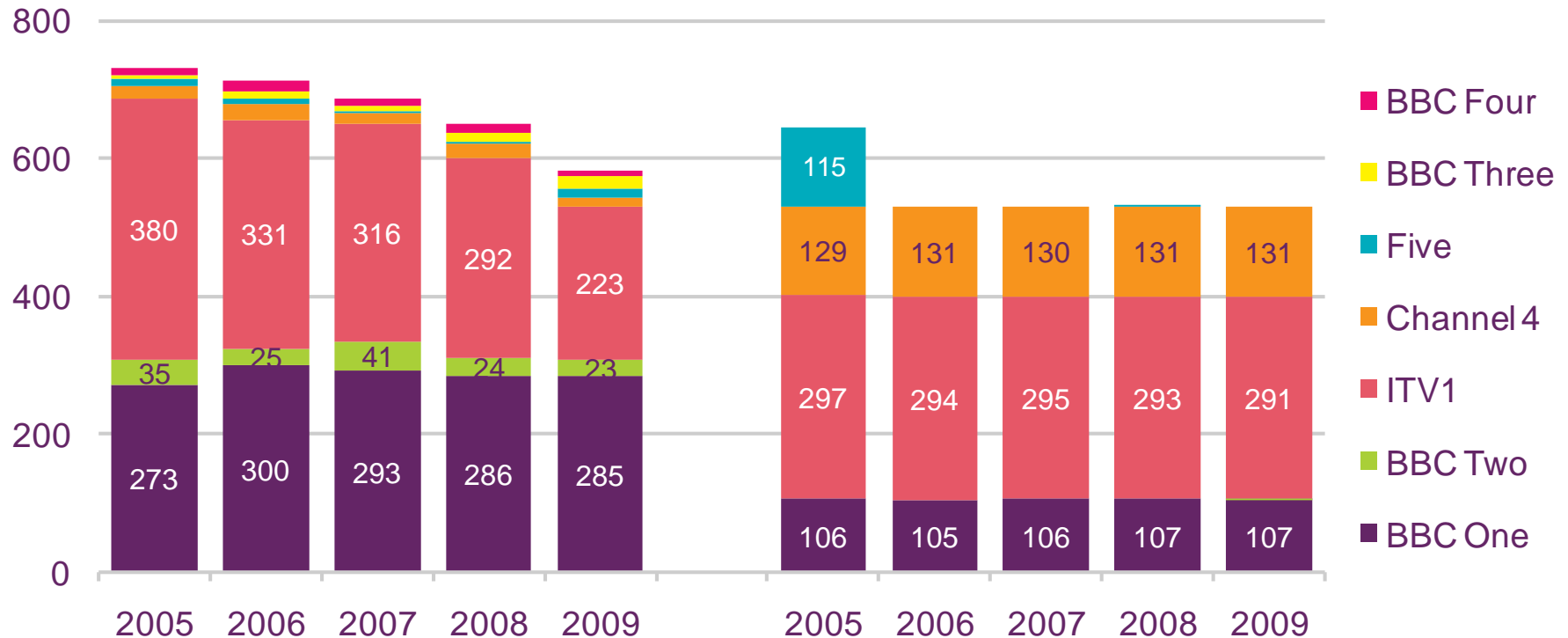
\*PSB Channels included: BBC One, BBC Two, ITV1, Channel 4, Five, CBBC, Cbeebies, S4C. Excluded: CITV.

## Summary: Drama, Soap, Sport and Comedy output

- First run originated Drama in peak time fell by 20% from 731 to 583 hours, primarily because of the cut backs on ITV1 and its need to reduce costs by making reductions in this, the most expensive programme genre. Since 2006, the volume of Soaps has remained static as the scheduling of peak time Soap titles on BBC One, ITV1 and Five has not changed (See Figure C44).
- A similar pattern can be seen in the all-day schedule, with the hours of Soaps being static and Drama falling because of the changes on ITV1 (See Figure C45). Having been the UK's major producer/commissioner of home-grown drama output up to 2008, ITV1 lost its position when BBC One took the lead in 2009, providing 47% of total output, with ITV1 at 35%.
- Volumes of Sport output vary in relation to the sports calendar and the ownership of sports rights. Levels in 2009 were lower year-on-year in peak time and across the full day and the spend on sport was also down year-on-year (See Figures C46 and C47).
- The volume of comedy output, including situation comedy fell 139 hours year-on-year with reductions across the board – in repeats, acquired and originations, the latter accounting for a fall of 20 hours, all of which were in peak time (See Figures C48 and C49). Programme spend fell 13% year-on-year to £138m.

## Fig C44 Peak time first-run originated Drama and Soap output hours

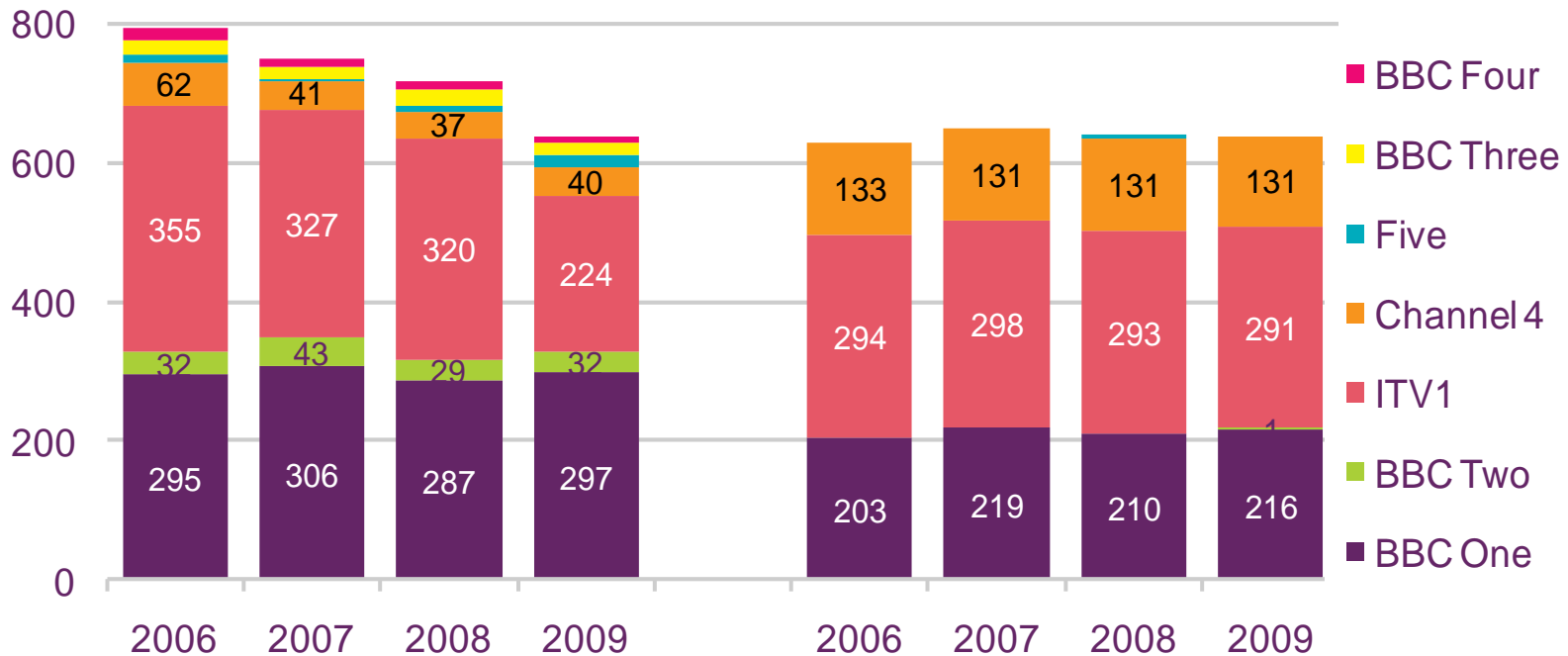
	First-run peak time originated Drama (exc. Soap)					First-run peak time originated Soap				
Spend	N/A	£461m	£412m	£393m	£340m	N/A	£196m	£197m	£204m	£202m
Hours	731	714	688	650	583	647	530	531	534	530
Hours per year, PSB channels										



Source: Ofcom/broadcasters

## Fig C45 UK Drama and UK Soap – All channels, all day, first-run originations

	First-run all day originated Drama (exc. Soap)				First-run all day originated Soap			
Spend	£494m	£444m	£417m	£356m	£207m	£208m	£215m	£213m
Hours	794	749	718	638	630	648	640	639
Hours per of output per year, PSB channels								

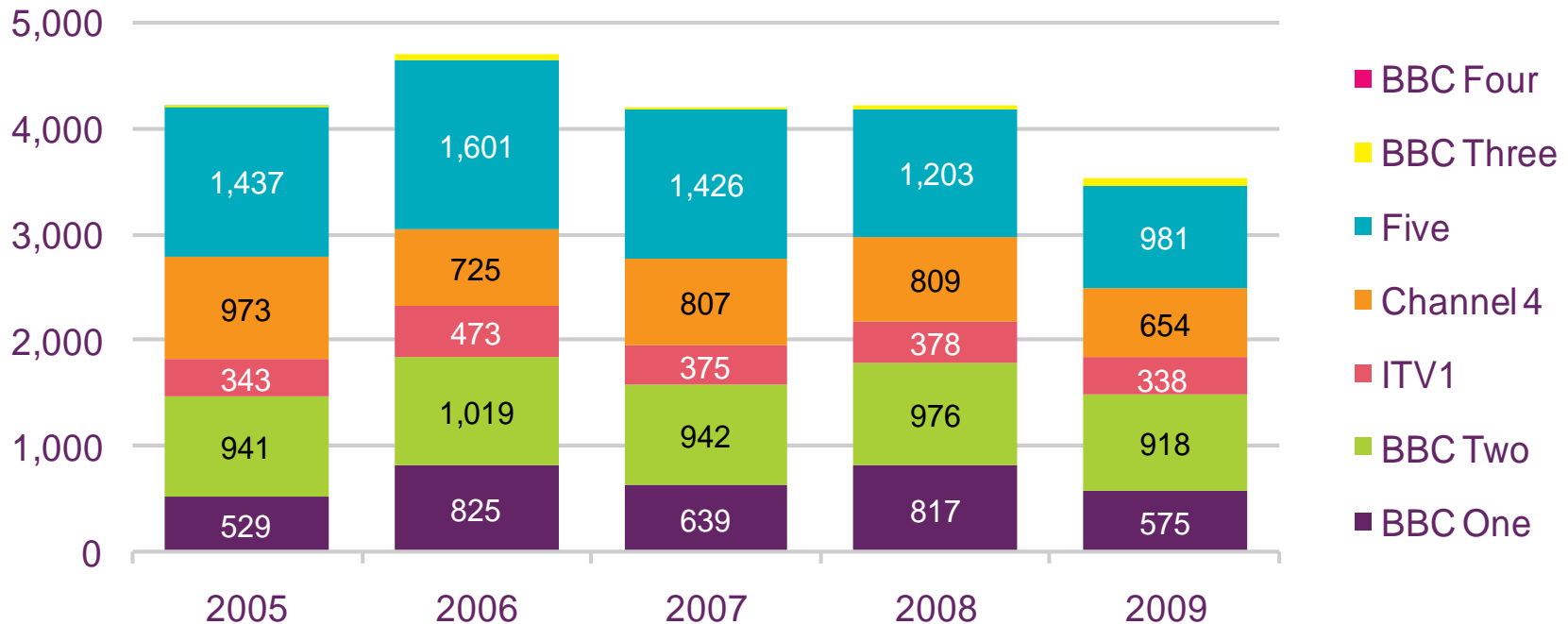


Source: Ofcom/broadcasters  
Data for 2005 is not available

## Fig C46 Sport output hours, 2005-2009

Spend	£456m	£578m	£427m	£507m	£418m
Hours	4,226	4,699	4,194	4,228	3,537

Hours per year, all day hours



Source: Ofcom/broadcasters

Note: Spend is given in 2009 prices







