2. Television and audio visual

Figure 2.1

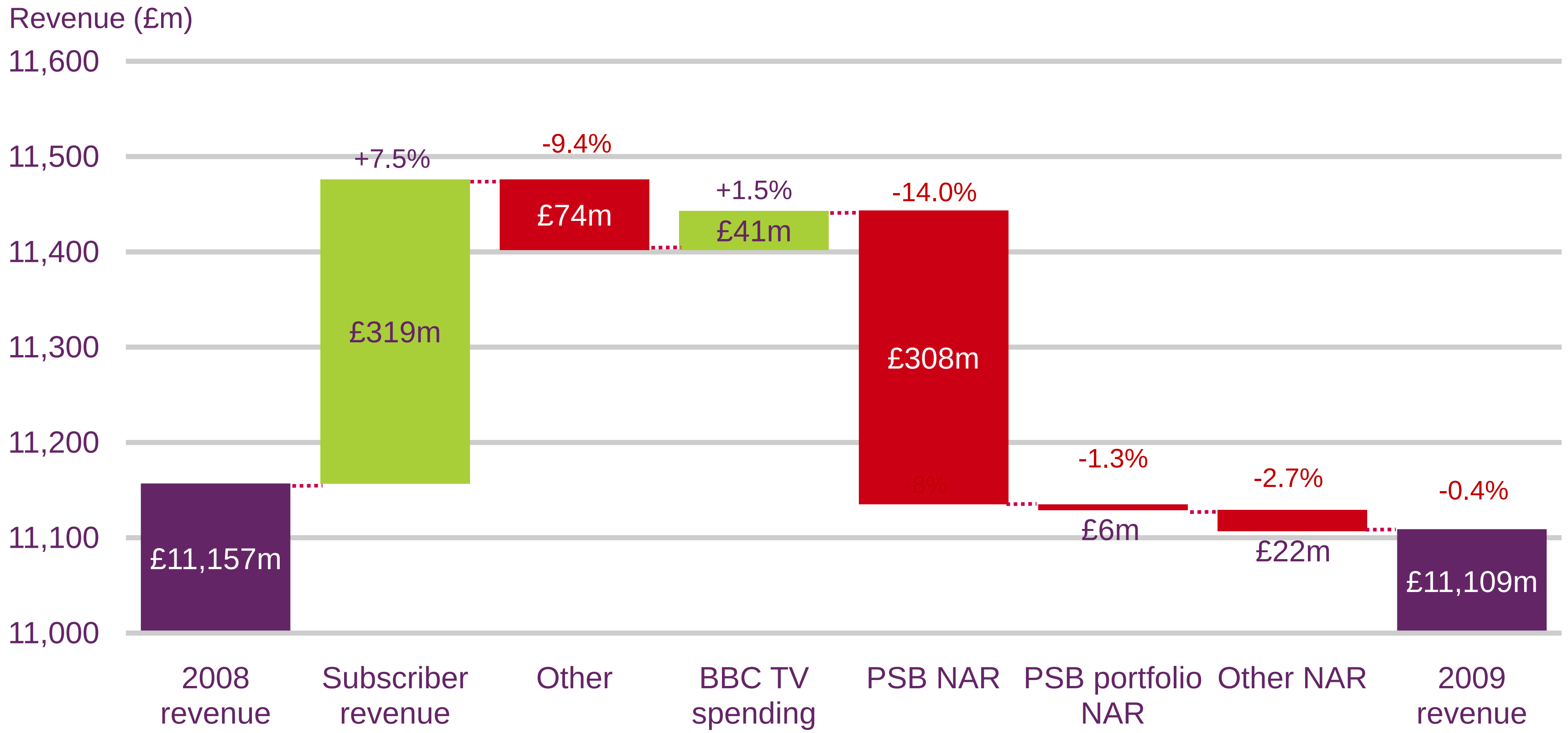
Industry metrics

UK television industry	2004	2005	2006	2007	2008	2009
Total TV industry revenue (£bn)	10.0	10.5	10.6	11.1	11.2	11.1
Proportion of revenue generated by public funds	24%	25%	25%	25%	24%	25%
Proportion of revenue generated by advertising	35%	35%	33%	32%	31%	28%
Proportion of revenue generated by subscriptions	34%	35%	36%	37%	39%	41%
TV as a proportion of total advertising spend	29.6%	29.6%	27.9%	26.9%	26.5%	27.5%
Spend on originated output by 5 main networks (£bn)	3.1	3.0	2.8	2.7	2.6	2.4
Digital TV take-up	53.0%	61.9%	69.7%	86.3%	87.1%	91.4%
Proportion of DTV homes paying for TV (Q1)	71.7%	64.3%	60.0%	55.0%	53.1%	54.6%
Viewing per head, per day (hours) in all homes	3.70	3.65	3.60	3.63	3.74	3.75
Share of the five main networks in all homes	73.8%	70.4%	66.7%	63.5%	60.8%	57.8%
Number of channels broadcasting in the UK	379	416	433	470	495	490

Source: Ofcom/broadcasters/Advertising Association/Warc/BARB/GfK. Note: Public funds include the DCMS grant to S4C and BBC funding that is allocated to TV; TV as a proportion of total advertising spend excludes direct mail and is based on © Advertising Association/Warc Expenditure Report (www.warc.com/expenditurereport); spend on originations includes spend on nations and regions programming (not Welsh and Gaelic language programmes but some Irish language). Note that digital television take-up in Q1 2010 had reached 92%

Figure 2.2

Changes in TV industry revenue, 2008 - 2009

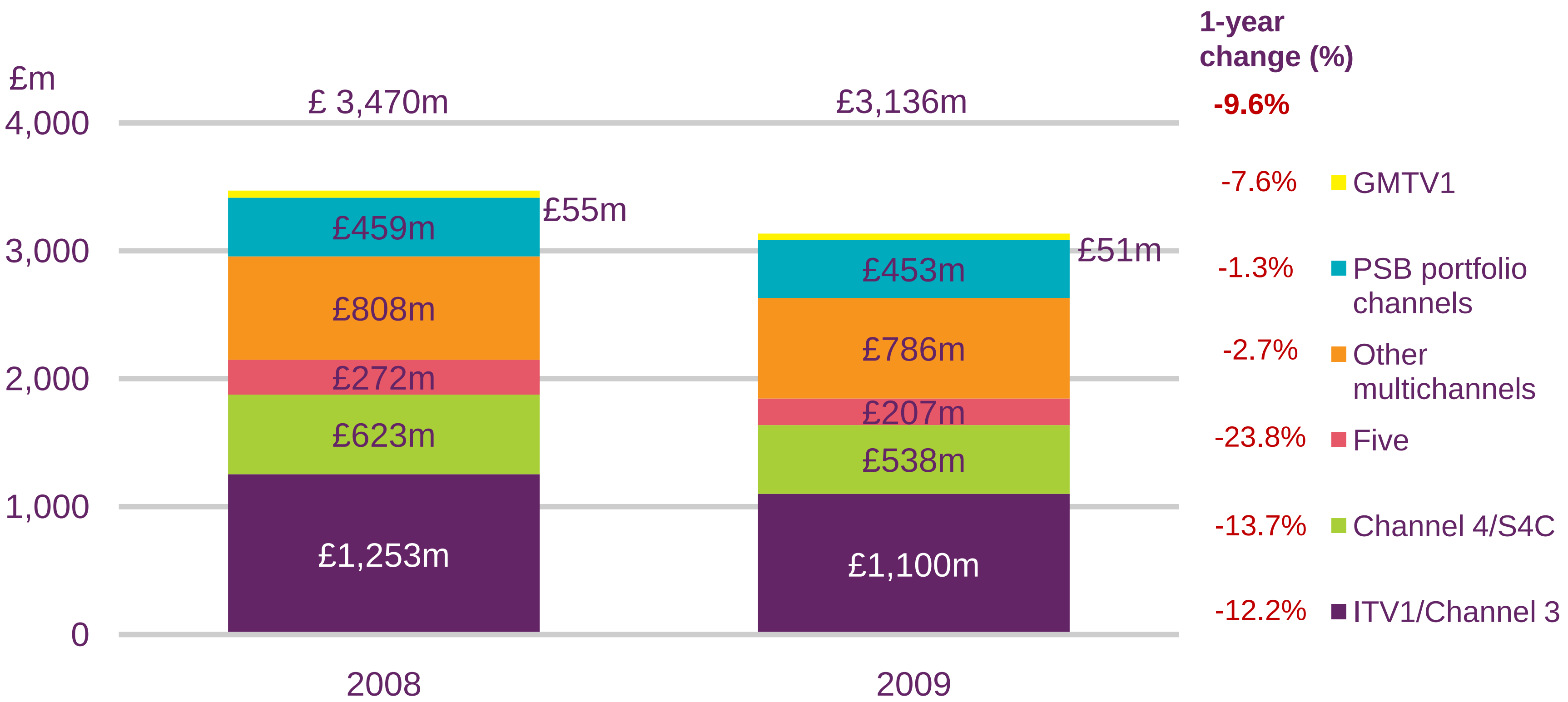


Source: Ofcom/broadcasters

Note: Figures expressed in nominal terms. PSB NAR comprises Channel 3 licensees (including GMTV1), Channel 4, Five and S4C. PSB portfolio NAR includes the commercial channels owned by the PSBs. 'Other NAR' comprises the rest of the multichannel market. Platform operator revenues do not include any installation costs, equipment sales or subsidies. BBC TV spending represents the amount of BBC revenue that is allocated to TV.

Figure 2.3

TV net advertising revenues



Source: Ofcom/broadcasters.
Note: Totals may not equal the sum of the components due to rounding. ITV1/Channel 3 includes ITV1, STV, UTV and Channel Television.

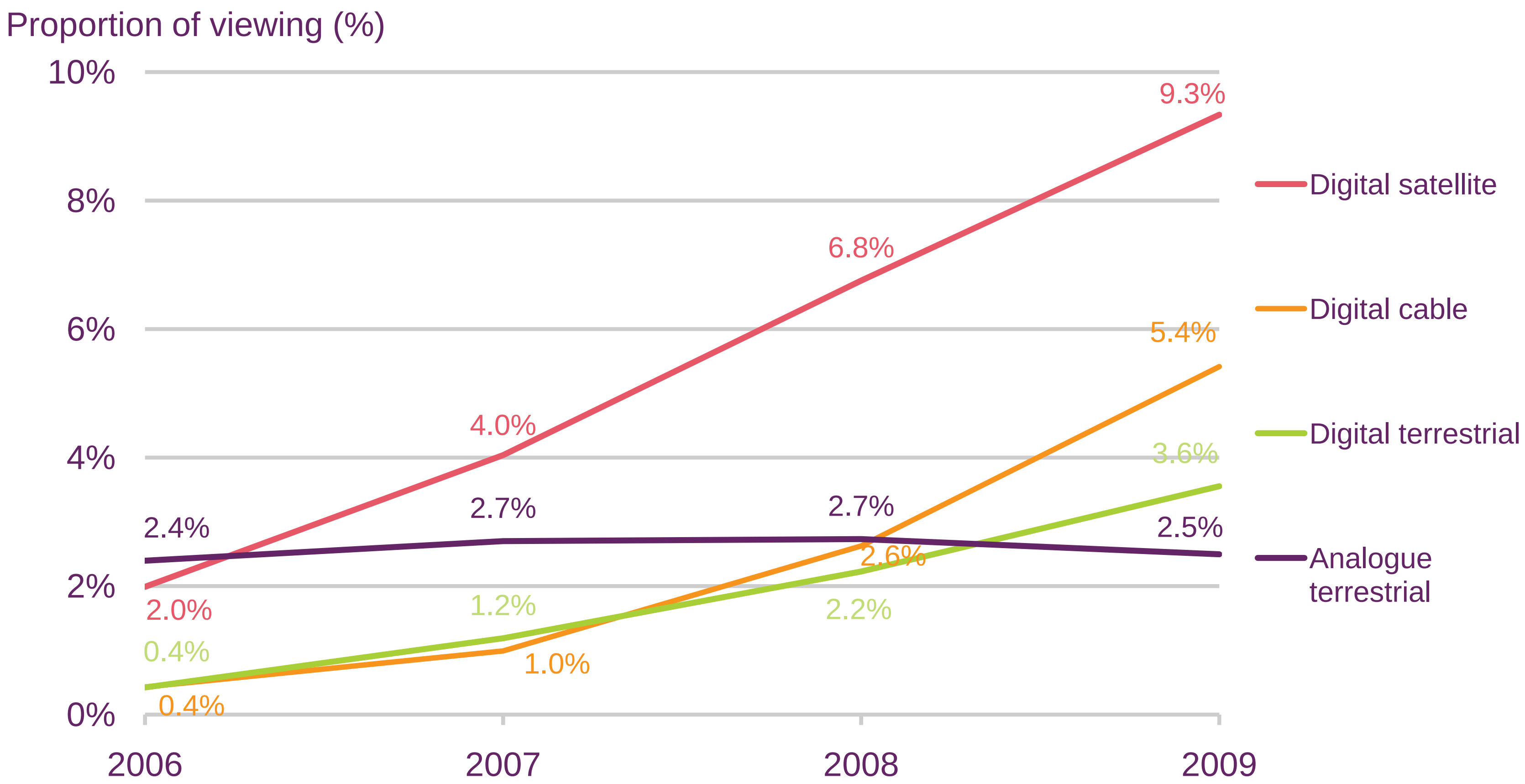
Figure 2.4

Live versus time-shifted TV viewing, all individuals, all homes

Source: BARB

Figure 2.5

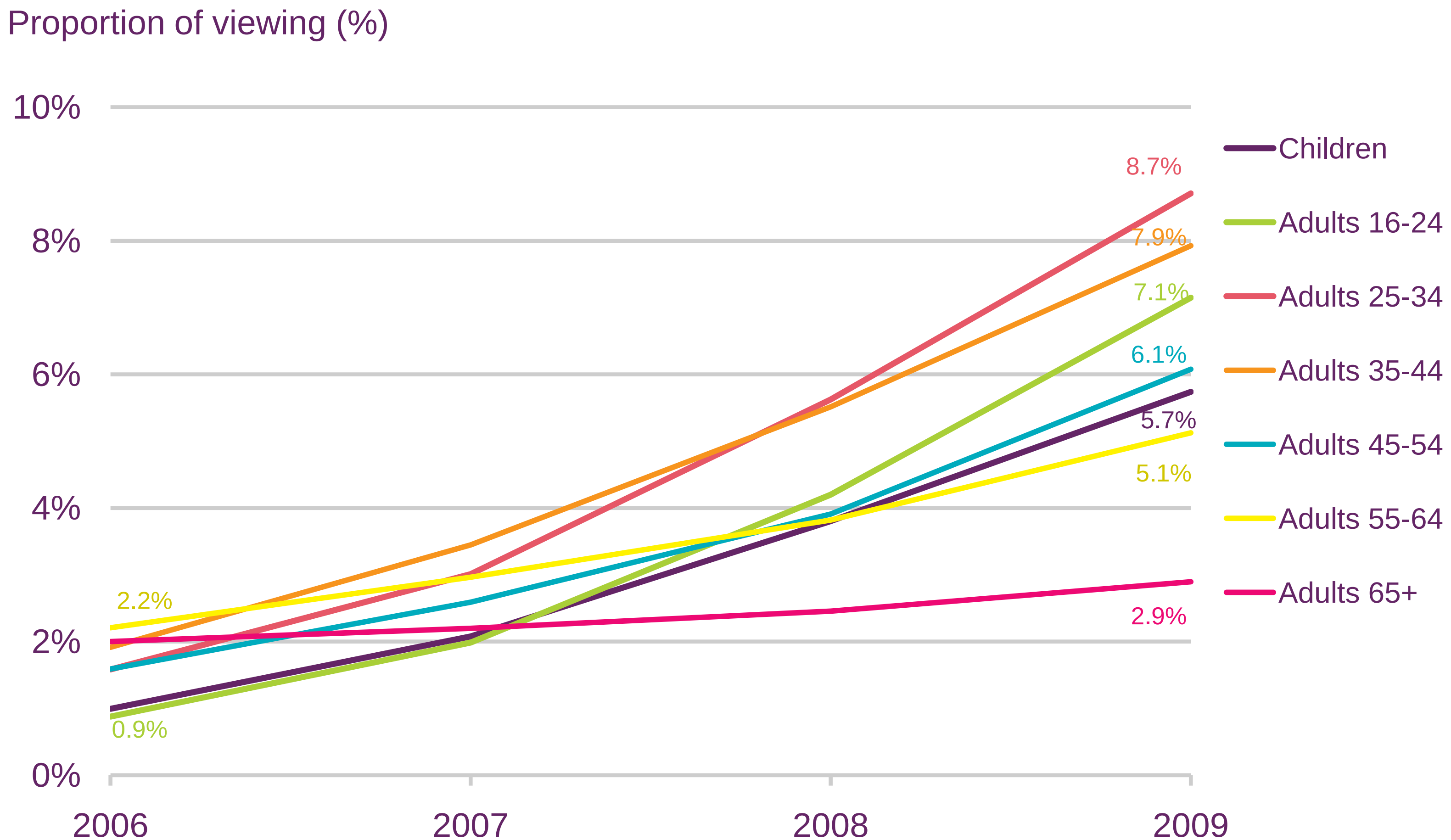
Proportion of viewing that is time-shifted, by platform



Source: BARB

Figure 2.6

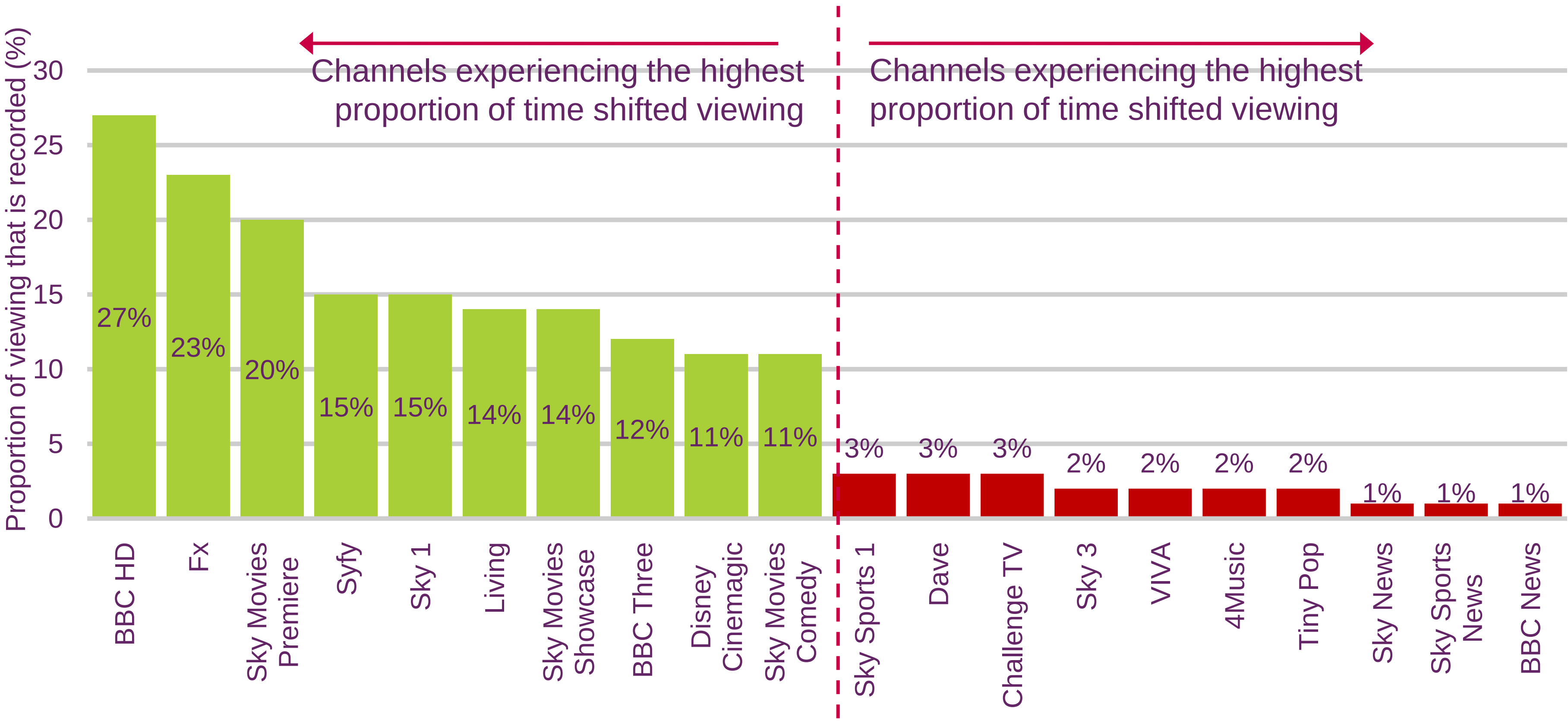
Proportion of viewing that is time-shifted, by age



Source: BARB

Figure 2.7

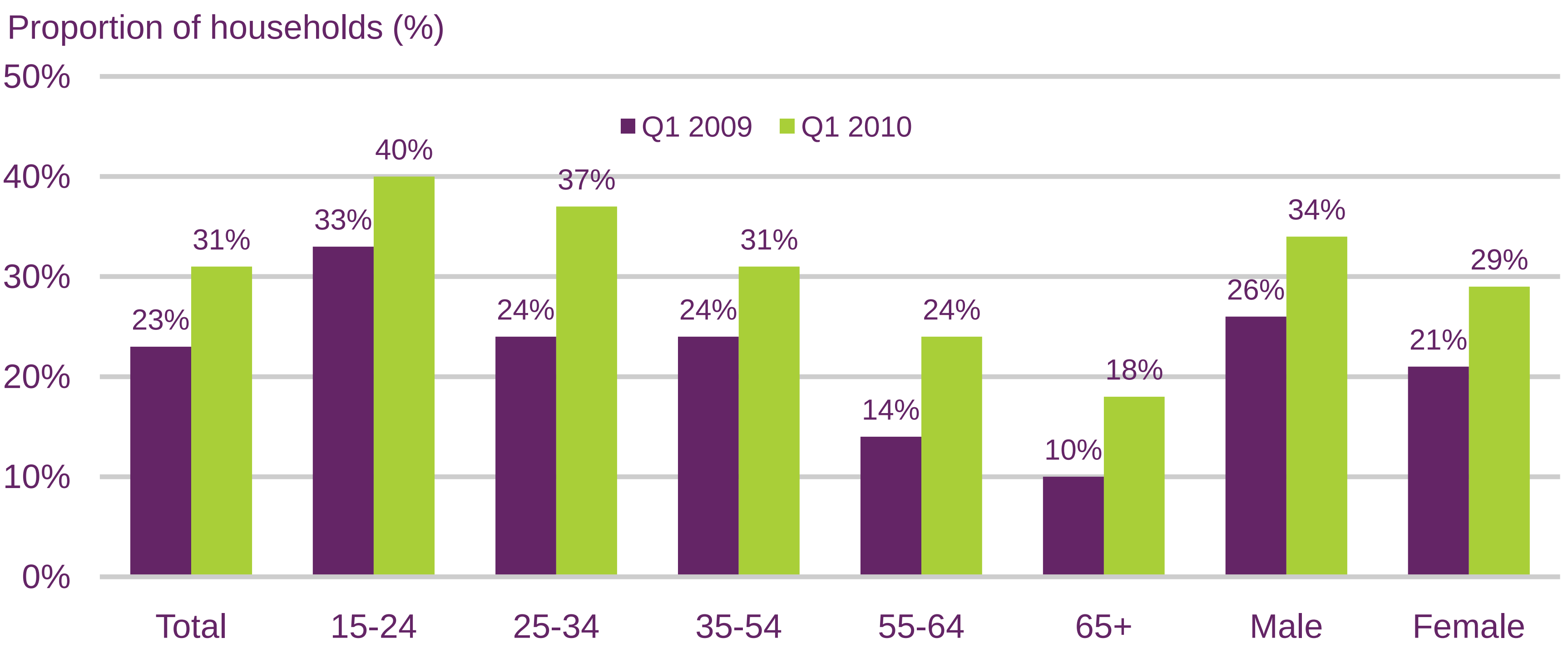
Channels with highest and lowest proportion of recorded viewing, 2009



Source: BARB. Includes +1 channels, viewing in multichannel homes, excluding channels with <0.1% share

Figure 2.8

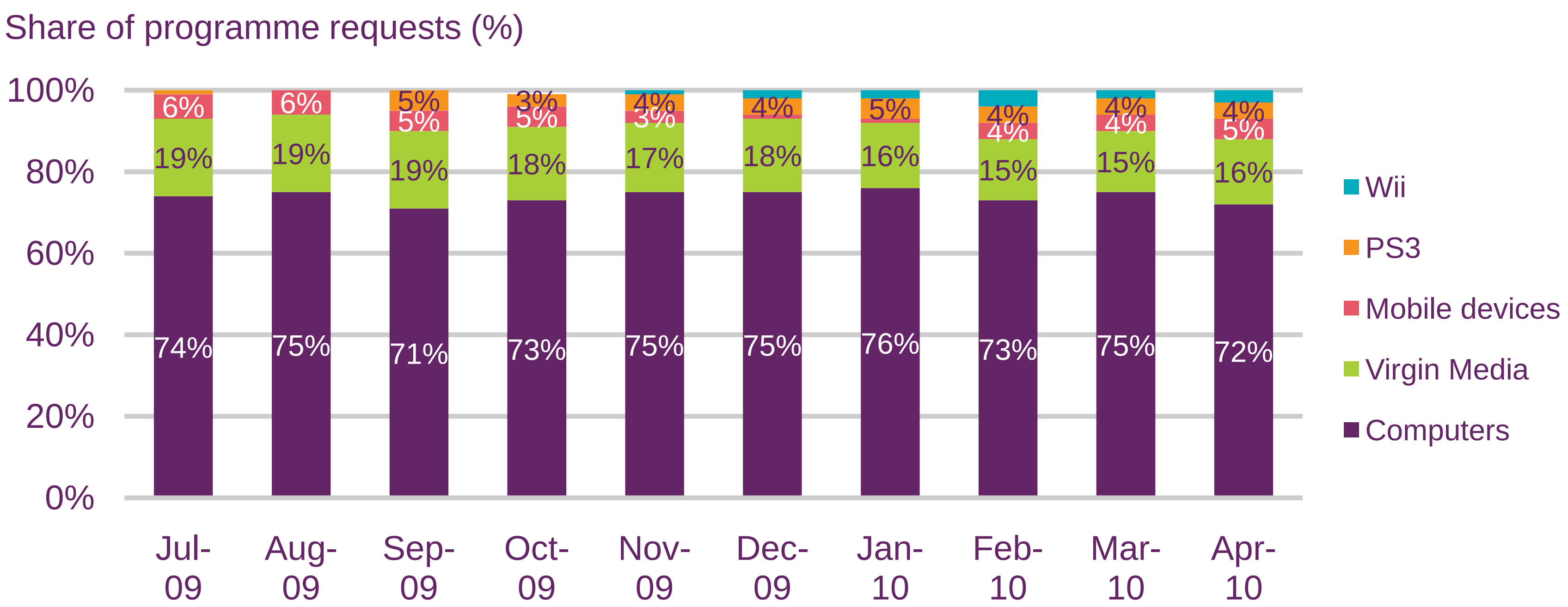
Proportion of adults with home internet who watch online catch-up TV



Source: Ofcom research Q1 2010
QE12. Which, if any, of these do you or your household use the internet for whilst at home?
Base: All adults who have the internet at home (n=6163 UK, 1048 15-24, 1100 25-34, 2464 35-54, 860 55-64, 691 65+, 3015 Male, 3148 Female)

Figure 2.9

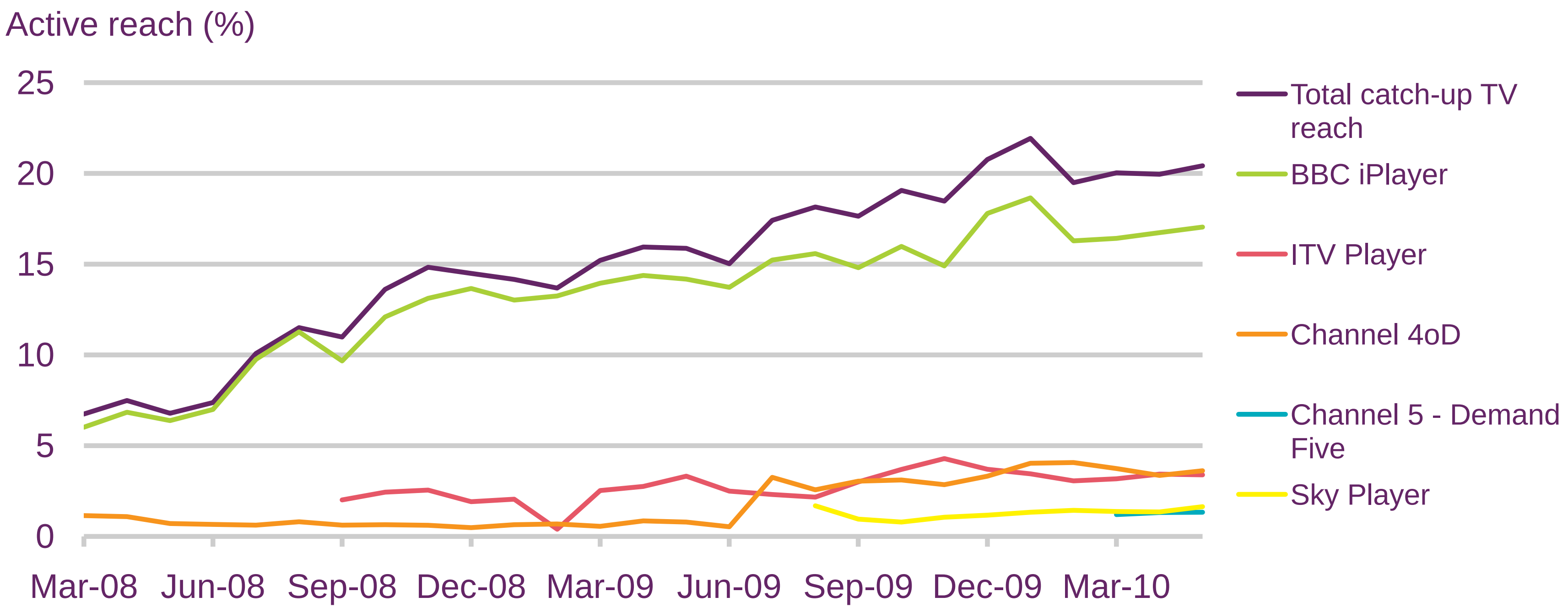
BBC iPlayer share of programme requests, by device type



Source: BBC iStats.
Note: Includes requests for radio programmes. Data from iPhones not available from 10 November to 2 February and data from Wii not available from 22 to 31 March, due to technical problems.

Figure 2.10

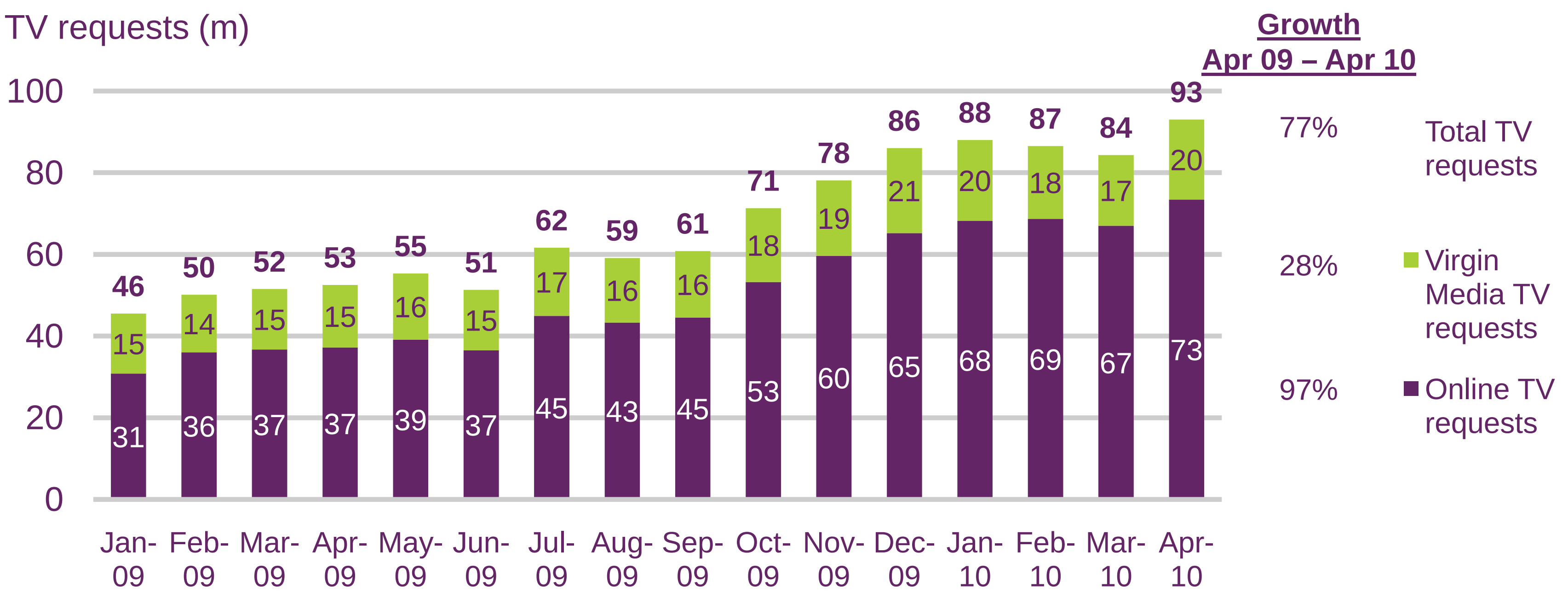
Active reach of major online catch-up TV services



Source: UKOM/Nielsen, home and work panel.
Note: 'Active reach' is the percentage of all active unique persons aged 2+ who visited the site or used the application. 'Active is defined as anyone who used an internet-enabled computer within the time period. 'Demand Five trend data not available prior to March 2010 due to change in UKOM definitions. Total catch-up TV reach is the unduplicated reach of all five services.

Figure 2.11

Total monthly iPlayer TV requests across all platforms



Source: BBC iStats.
Note: Does not include radio. Includes both simulcast and on-demand.

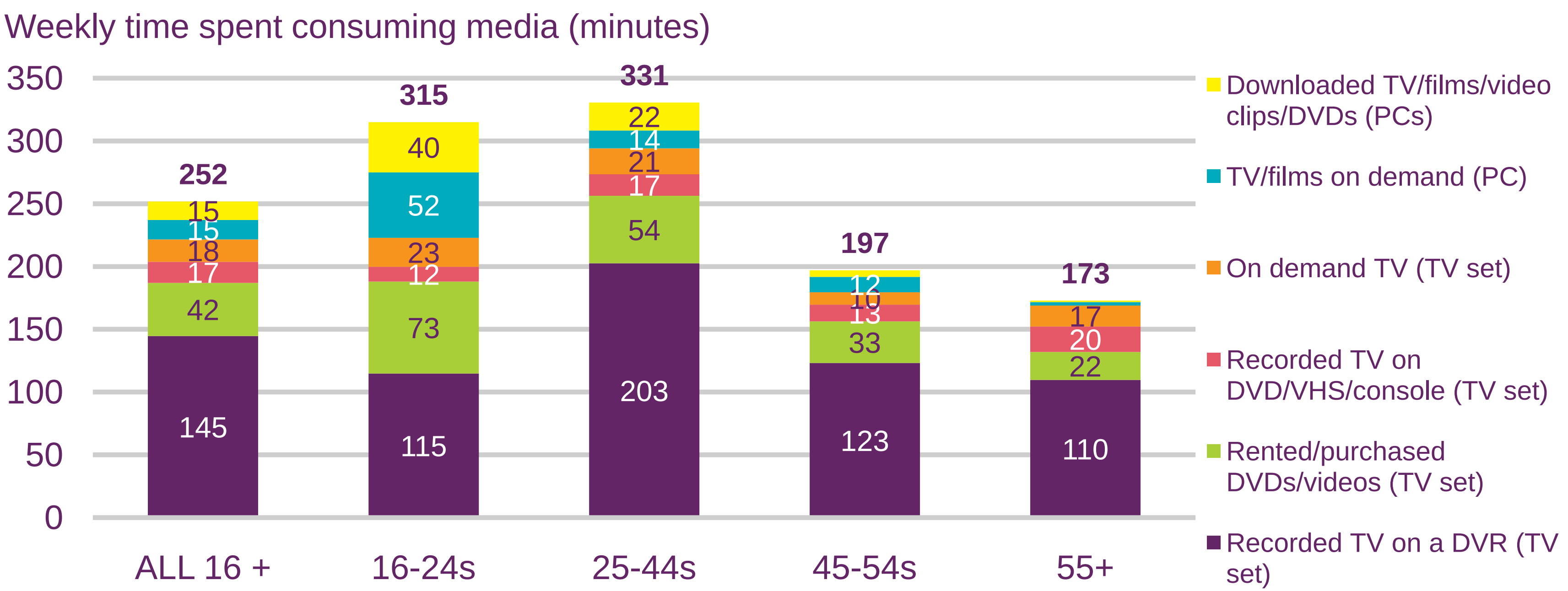
Figure 2.12

Linear/non-linear split of weekly time spent consuming audio-visual content on TV and computers

Source: Ofcom research
Base: All respondent days - 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373
Note: Scheduled TV does not include live online TV streaming; content consumed via mobile devices is also not included. Non-linear TV includes content consumed on DVRs, rented/purchased DVDs/VHS, recorded TV on DVDs/VHS/games consoles/on demand TV through a TV set or PC, and content downloaded from the internet.

Figure 2.13

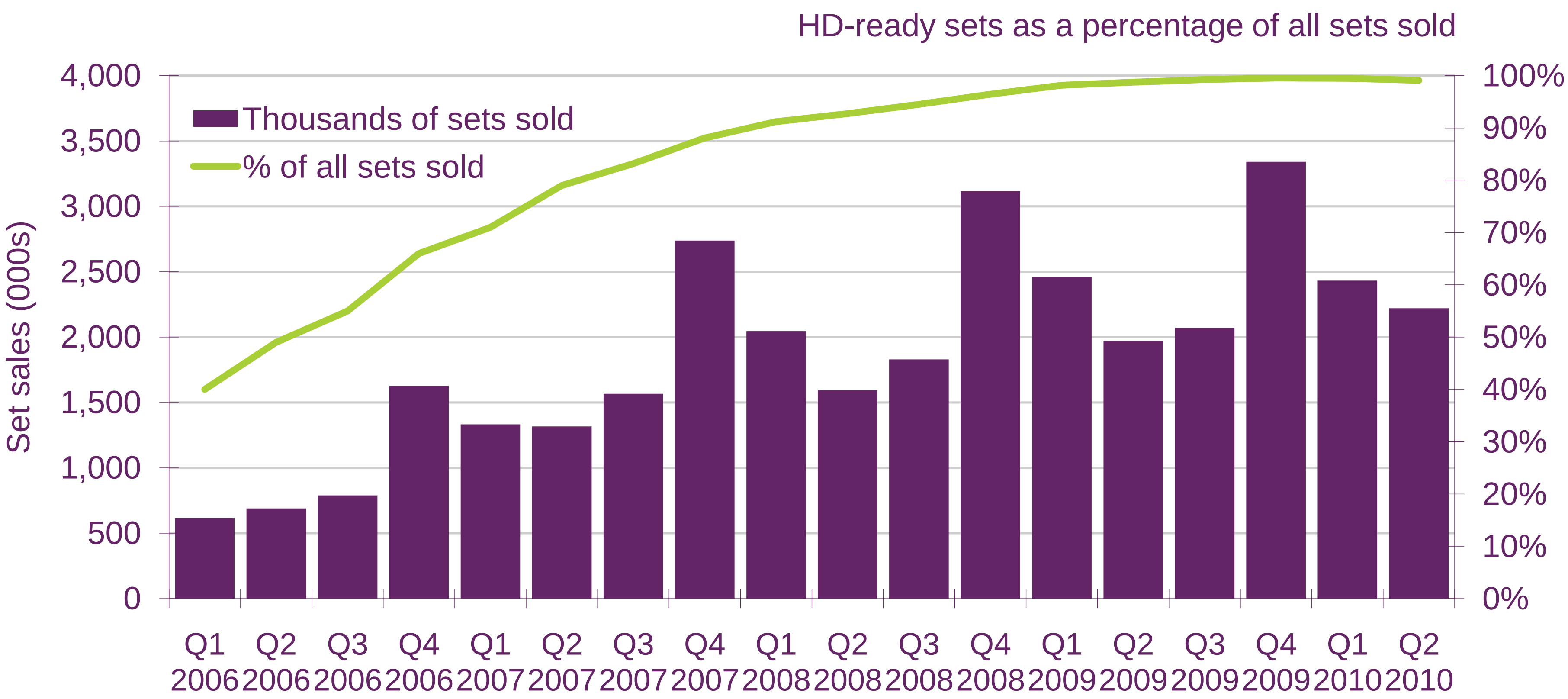
Weekly time spent consuming selected non-linear video content



Source: Ofcom research
Base: All respondent days - 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 2.14

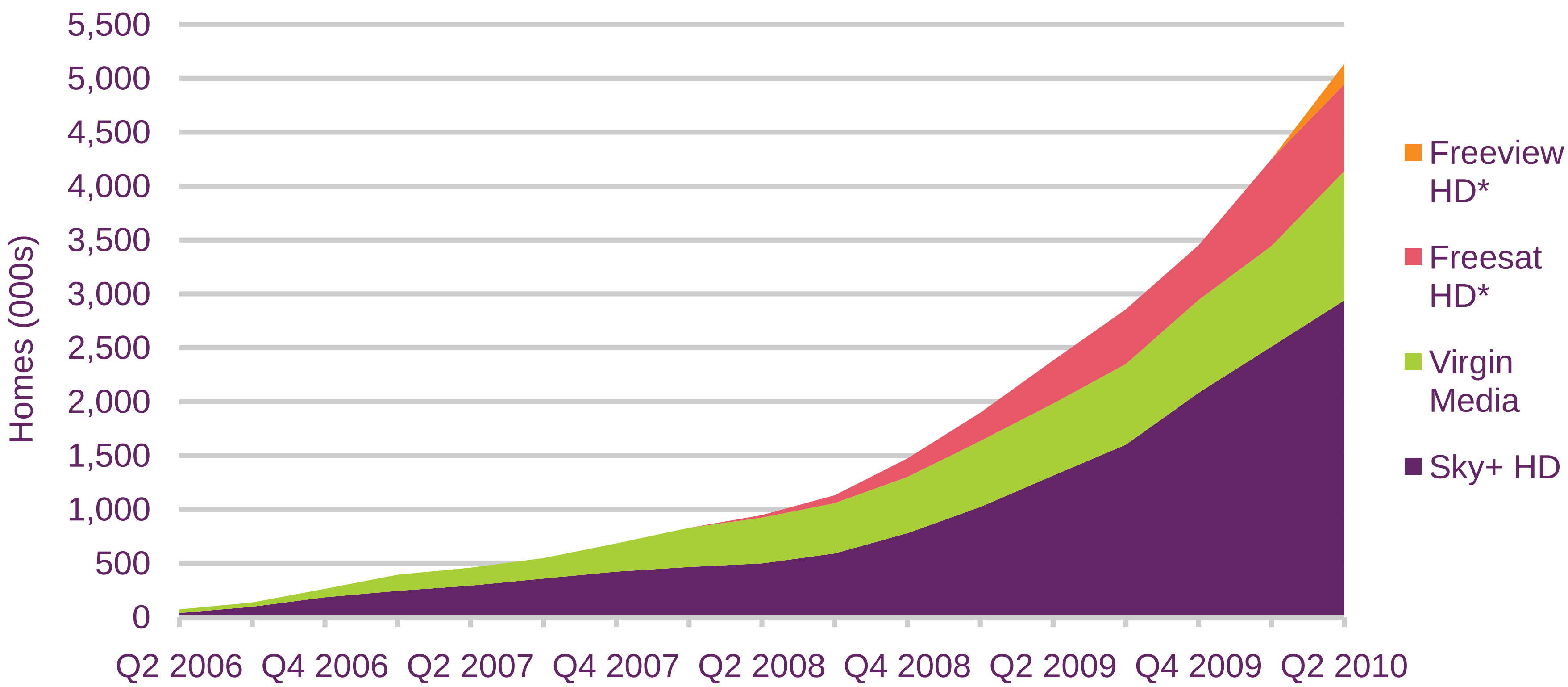
HD-ready sets: sales



Source: GfK sales data

Figure 2.15

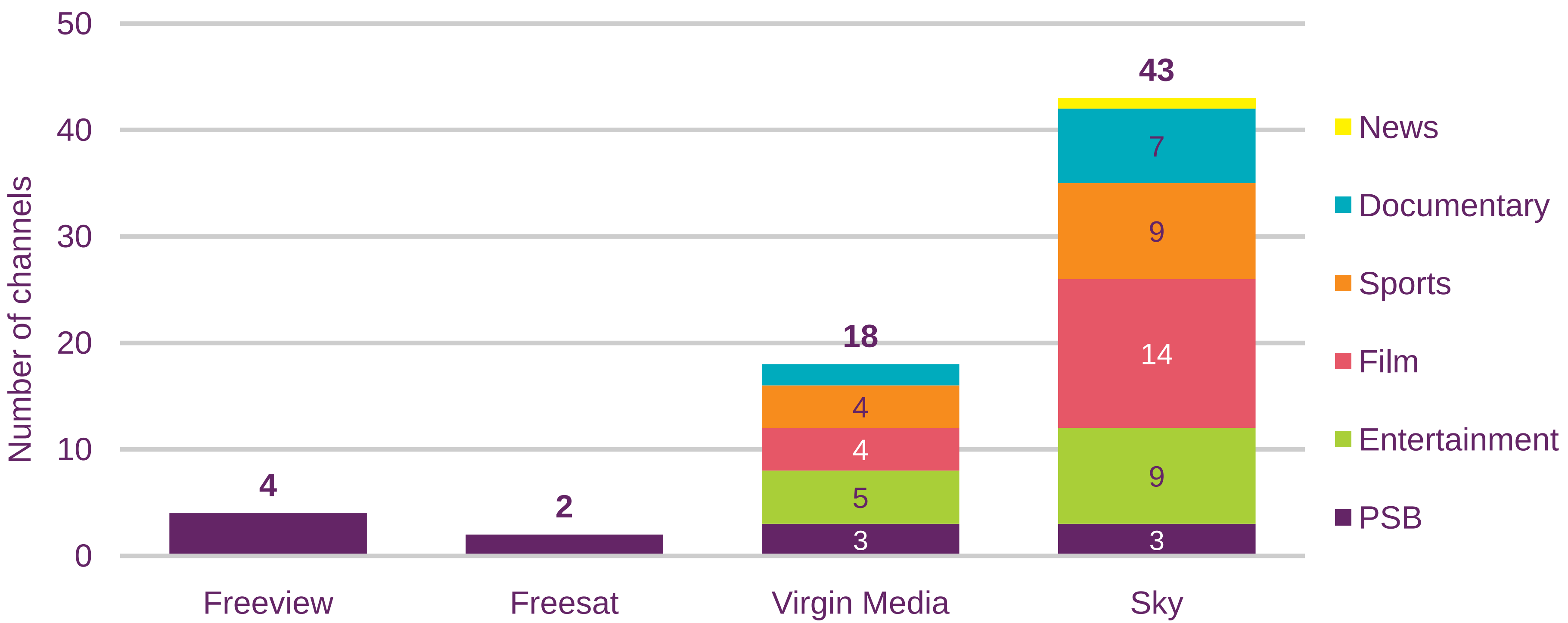
Number of broadcast HD homes: BSkyB, Virgin Media, Freesat and Freeview



Source: Operators/GfK
Note: Figures represent latest available data. Freesat HD and Freeview HD figures based on HD device sales, therefore the cumulative number of HD homes is indicative only.

Figure 2.16

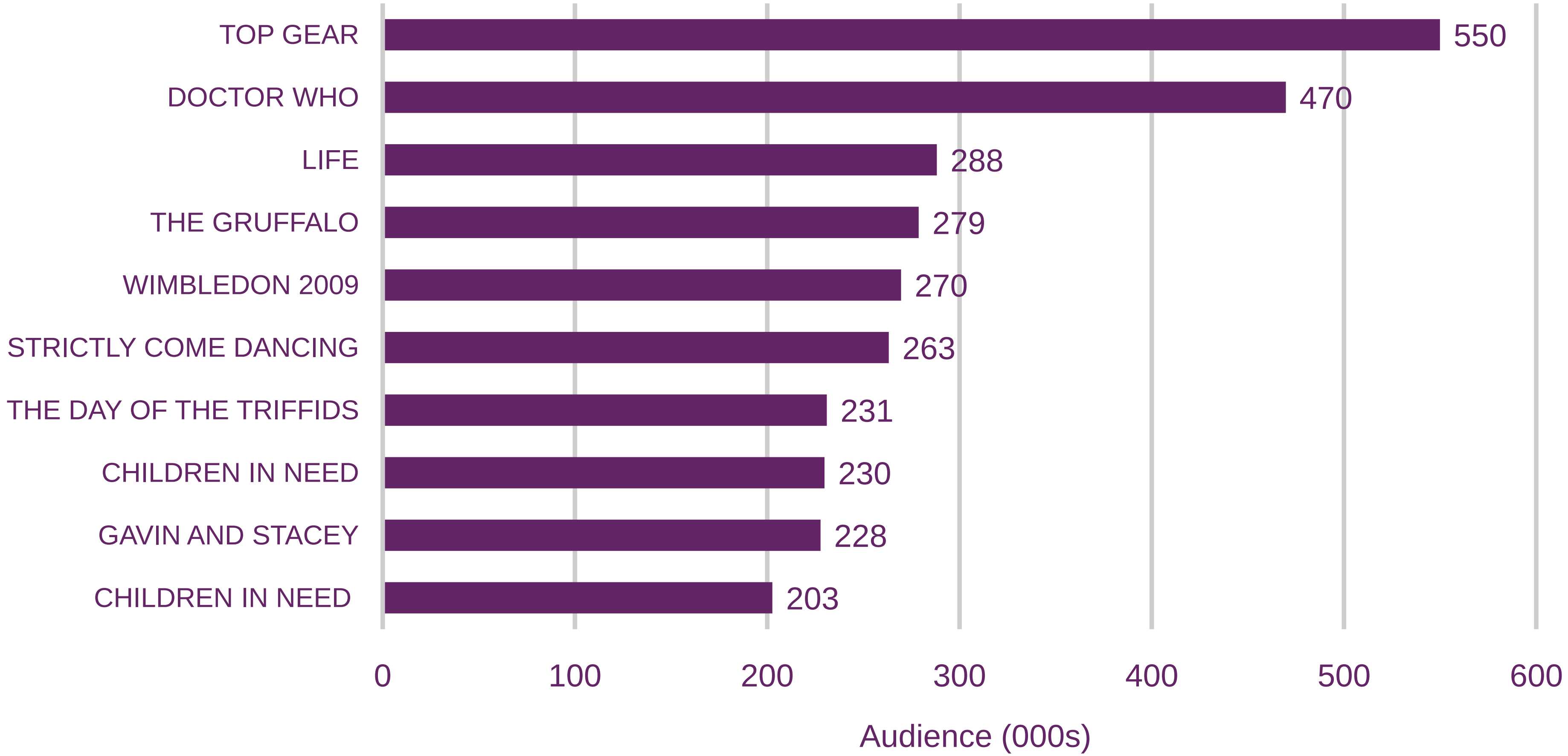
HD channel line-up by platform and genre, 2010



Source: Ofcom/Operators
Notes: Sky includes two PPV HD channels. Does not include HD VoD available from Virgin Media, BT Vision, Talk Talk TV, Fetch TV and iPlayer on Freesat. Data correct as of August 2010.

Figure 2.17

Top 10 most-viewed programmes on BBC HD in 2009



Source: BARB, all individuals 4+, highest occurrence per title

Figure 2.18

Selected international 3DTV services

Operator	Platform	Product	Launch date	Content	Business model
BSkyB (UK)	Satellite	Sky 3D channel	April 2010 (commercial) Autumn 2010 (residential)	Launched with Premier League football; intends to add movies, documentaries and arts programmes by late 2010	Residential: Free with a premium subscription to Sky + HD Commercial: appointment to view sports events
Canal + (France)	Satellite	3D events channel	By end of 2010	Sports events, including the World Cup and French Open	Linear programmes and VoD
DirecTV (US)	Satellite	3 DirecTV 3D channels and ESPN 3D channel	June 2010	Movies, sports, special events, arts, music and documentaries	Channels 1 & 3 based on PPV model, Channel 2 showing linear broadcasts available to all subscribers
Numericable (France)	Cable	3D VoD channel	Autumn 2010	Mixed content	Available to subscribers, pricing and packaging to be confirmed in 2010
J:Com (Japan)	Cable	3D linear and VoD channels	April 2010	Content provided by existing channel providers, as well as outside production companies,	Linear programmes and VoD, via existing set-top boxes.

Figure 2.19

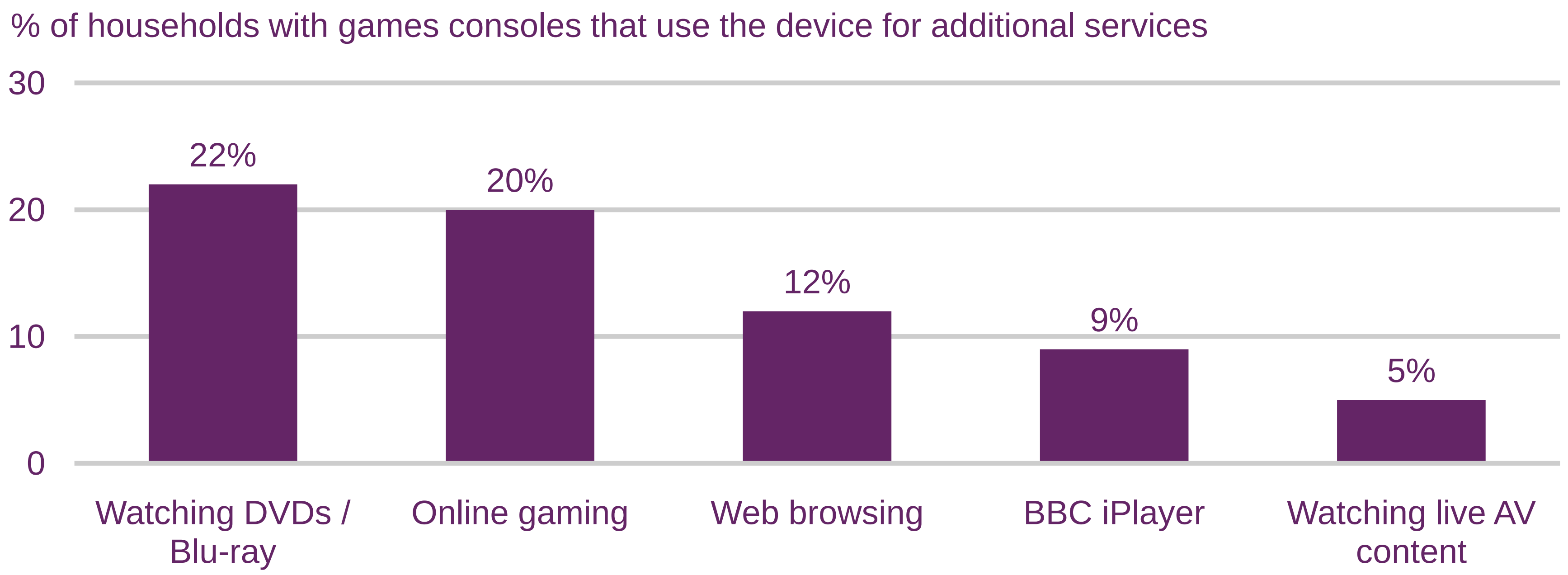
Comparison of 3DTV television sets

Manufacturer	Launch date	Price	Panel type	3D viewing technology
Sony	June 2010	£1,799	LCD	Active shutter glasses
LG	May 2010	£2,799	LCD	Polarised glasses
Toshiba	Q4 2010	TBC	LCD	Active shutter glasses
Panasonic	May 2010	£2,295	Plasma	Active shutter glasses
Samsung	April 2010	£2,300	Plasma, LCD	Active shutter glasses

Source: Manufacturers, prices at launch

Figure 2.20

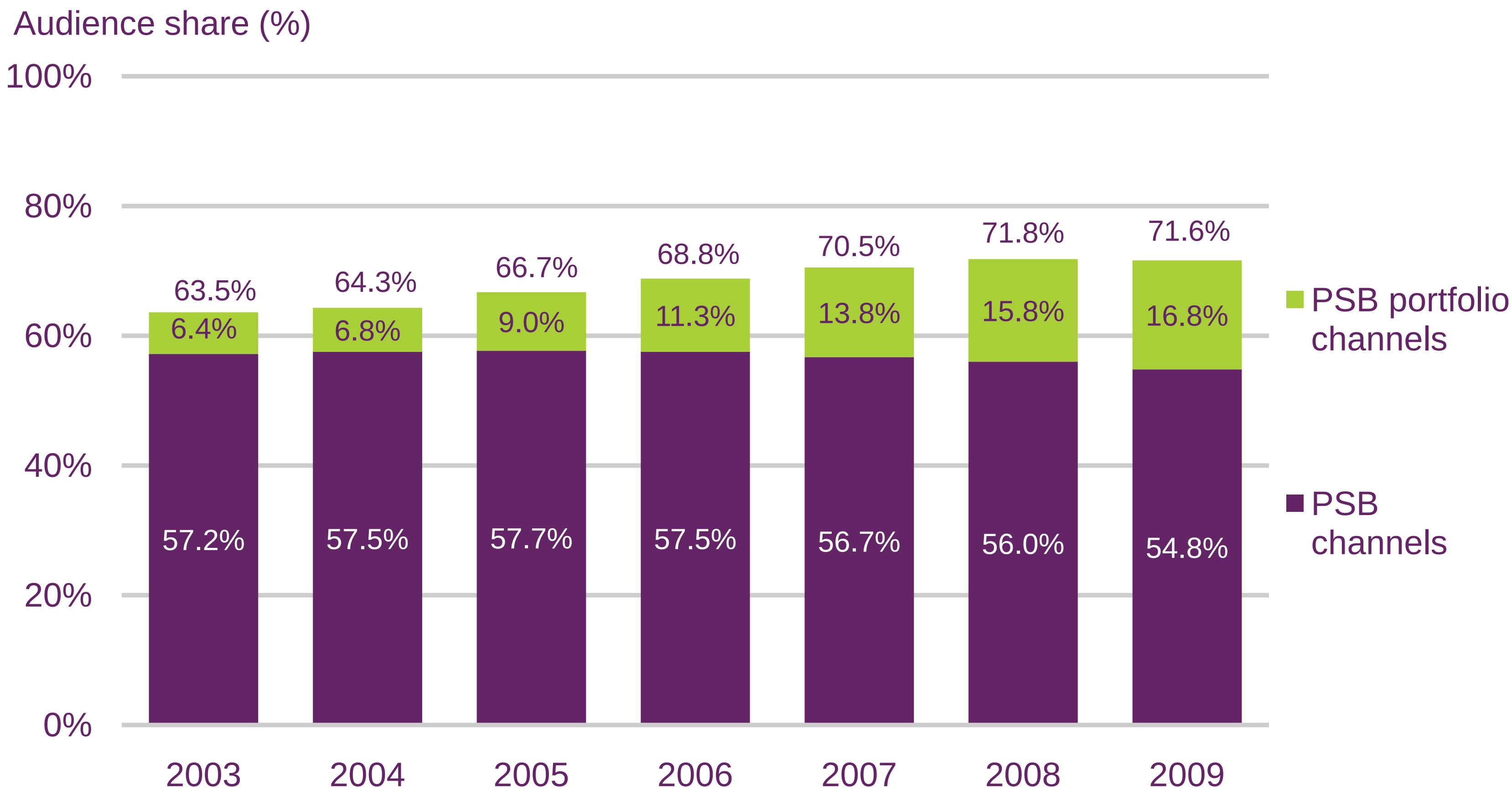
Additional use of games consoles



Source: Ofcom research, Q1 2010
Base: UK adults 15+ who have access to a games console at home (n=4374)
QB4 Which, if any, of these do you use your games console for?

Figure 2.21

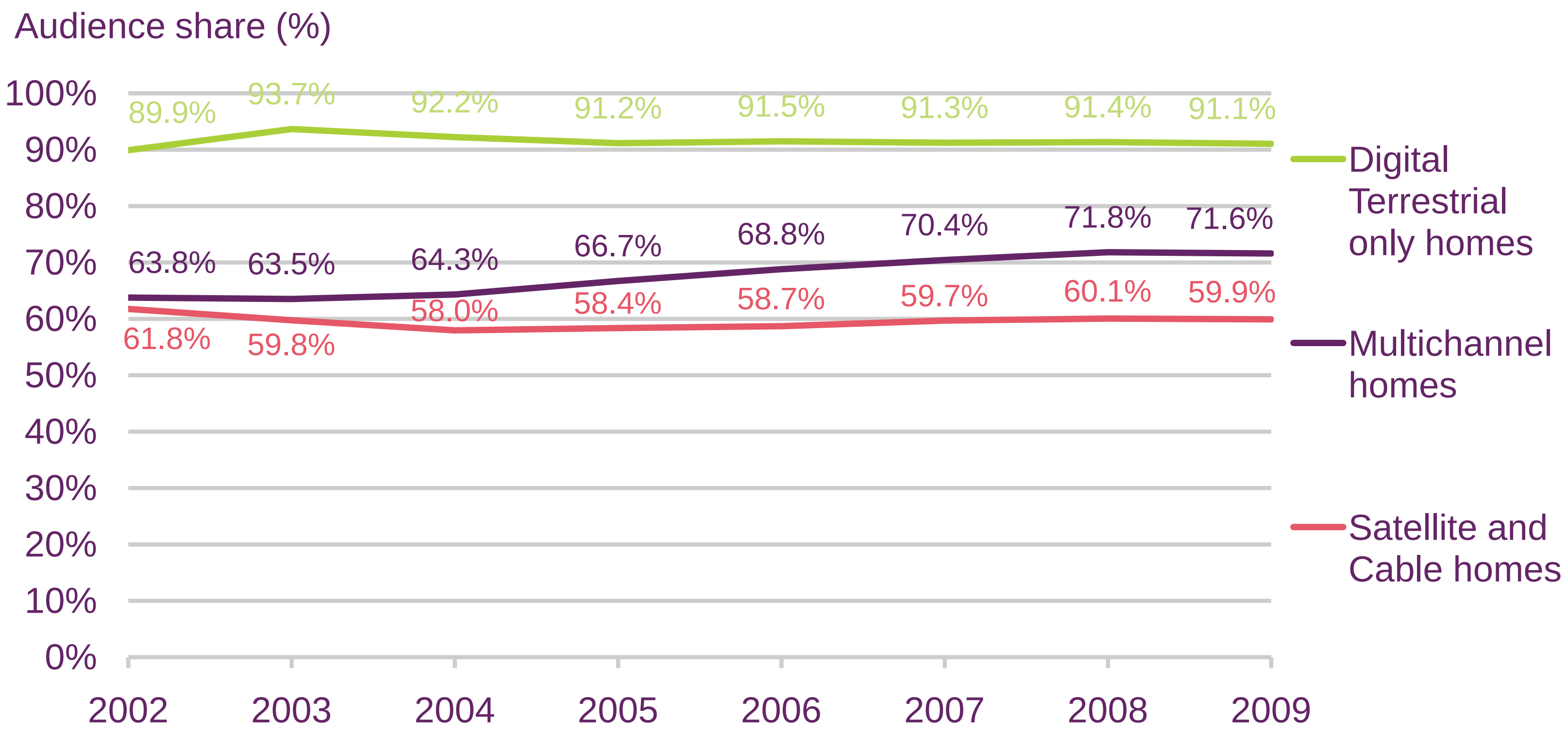
PSB portfolios’ share in multichannel homes



Source: BARB

Figure 2.22

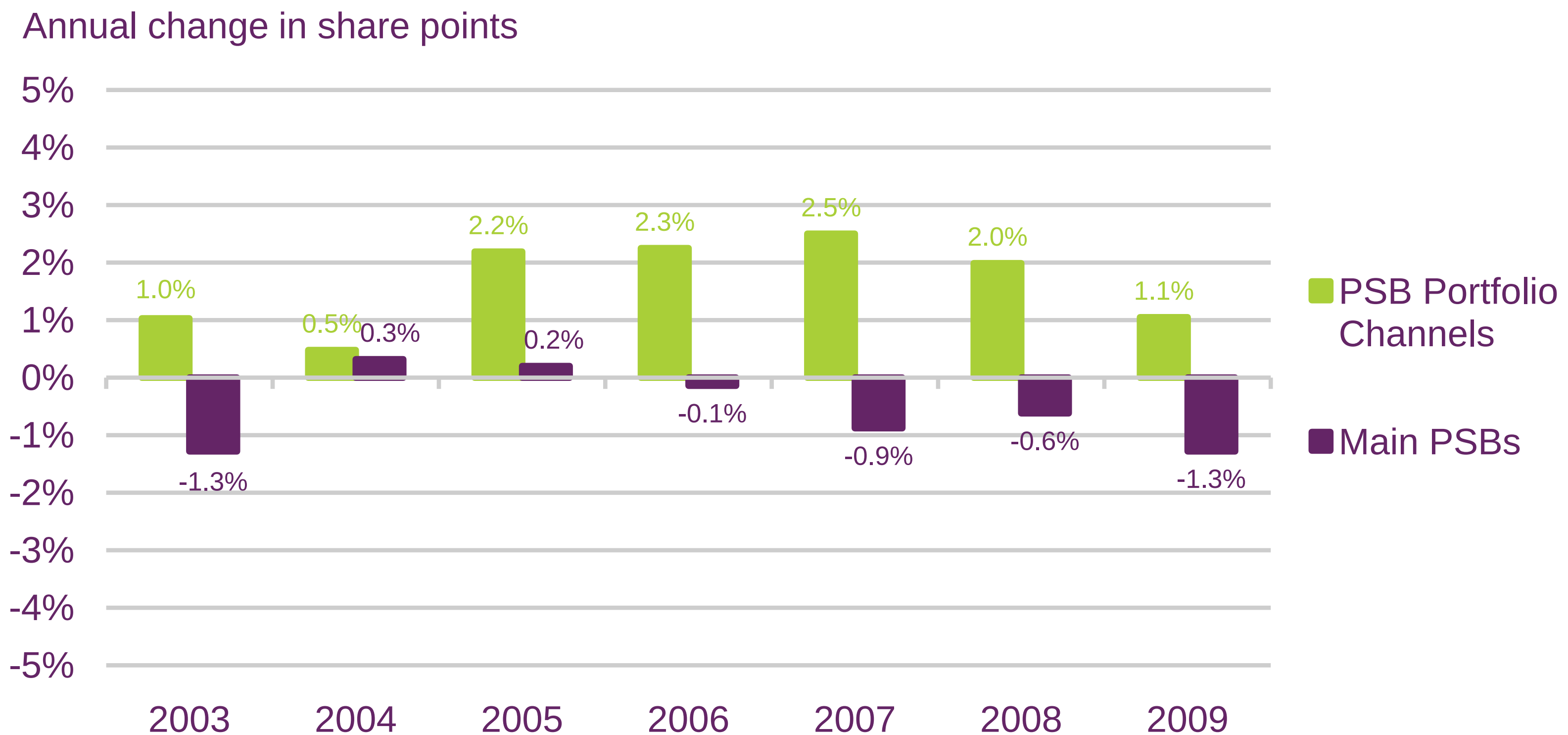
PSB portfolios' combined share



Source: BARB

Figure 2.23

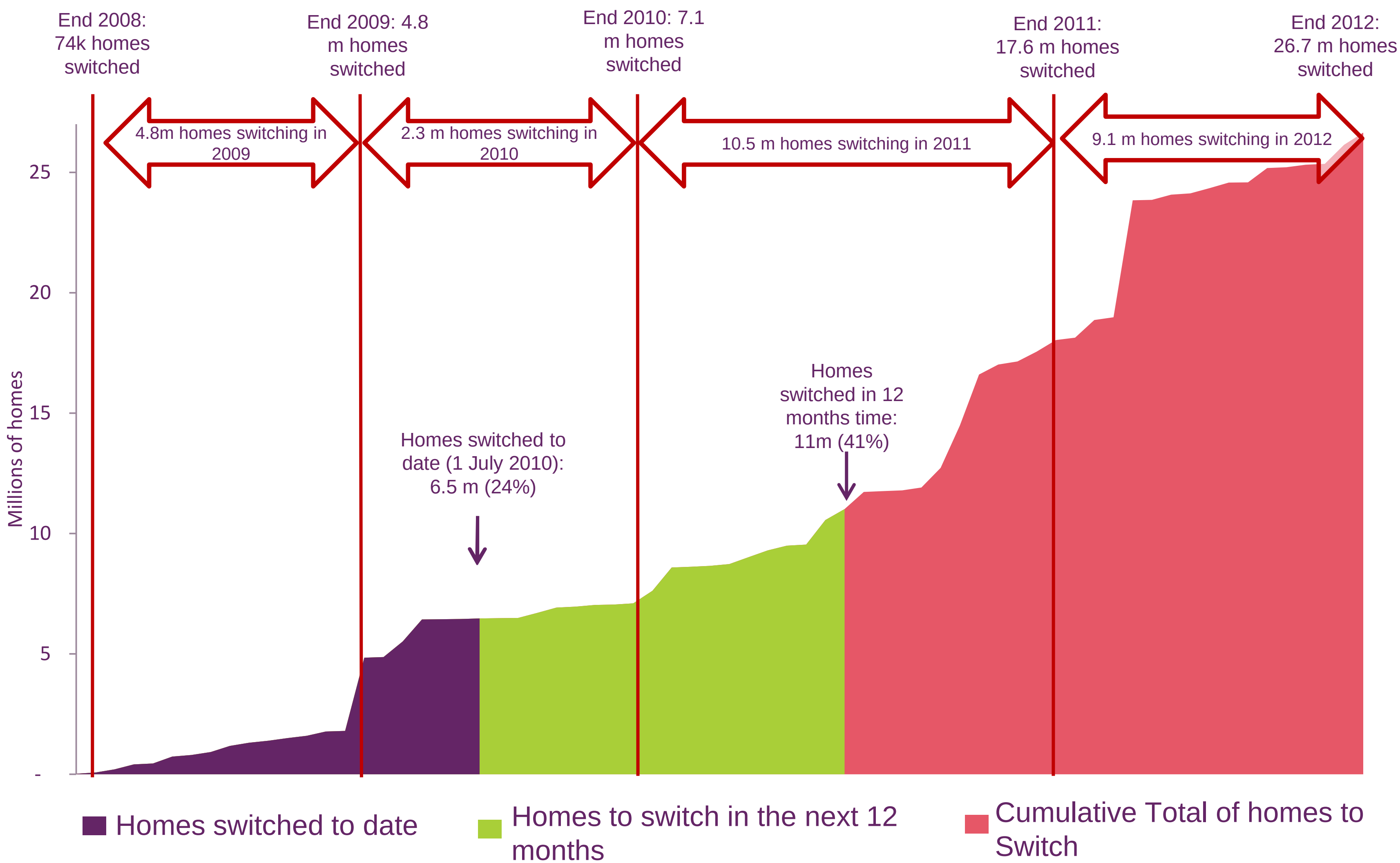
Annual growth in share of the main PSBs and their channels



Source: BARB

Figure 2.24

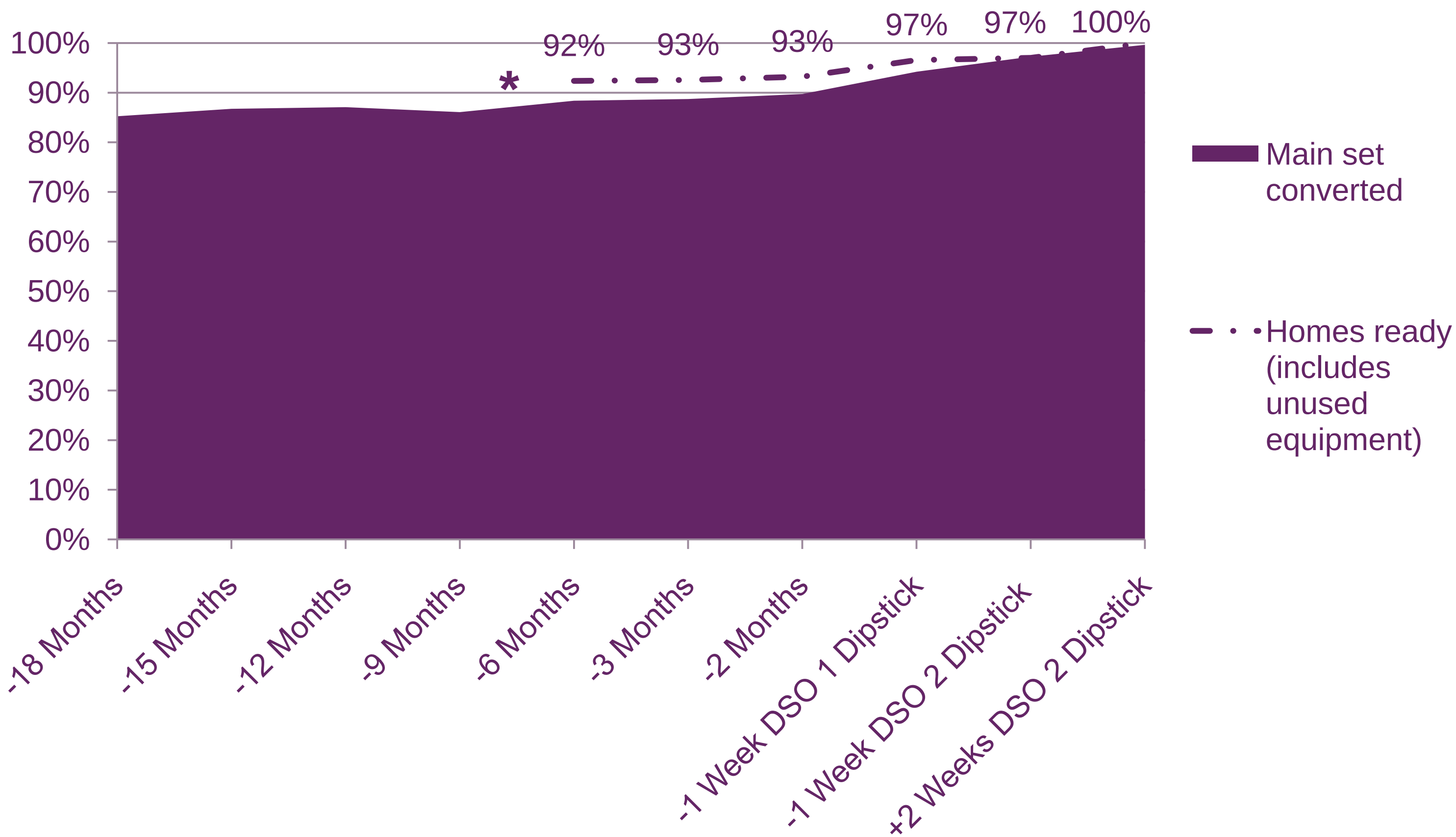
Digital switchover programme status to end of June 2010



Source: Digital UK

Figure 2.25

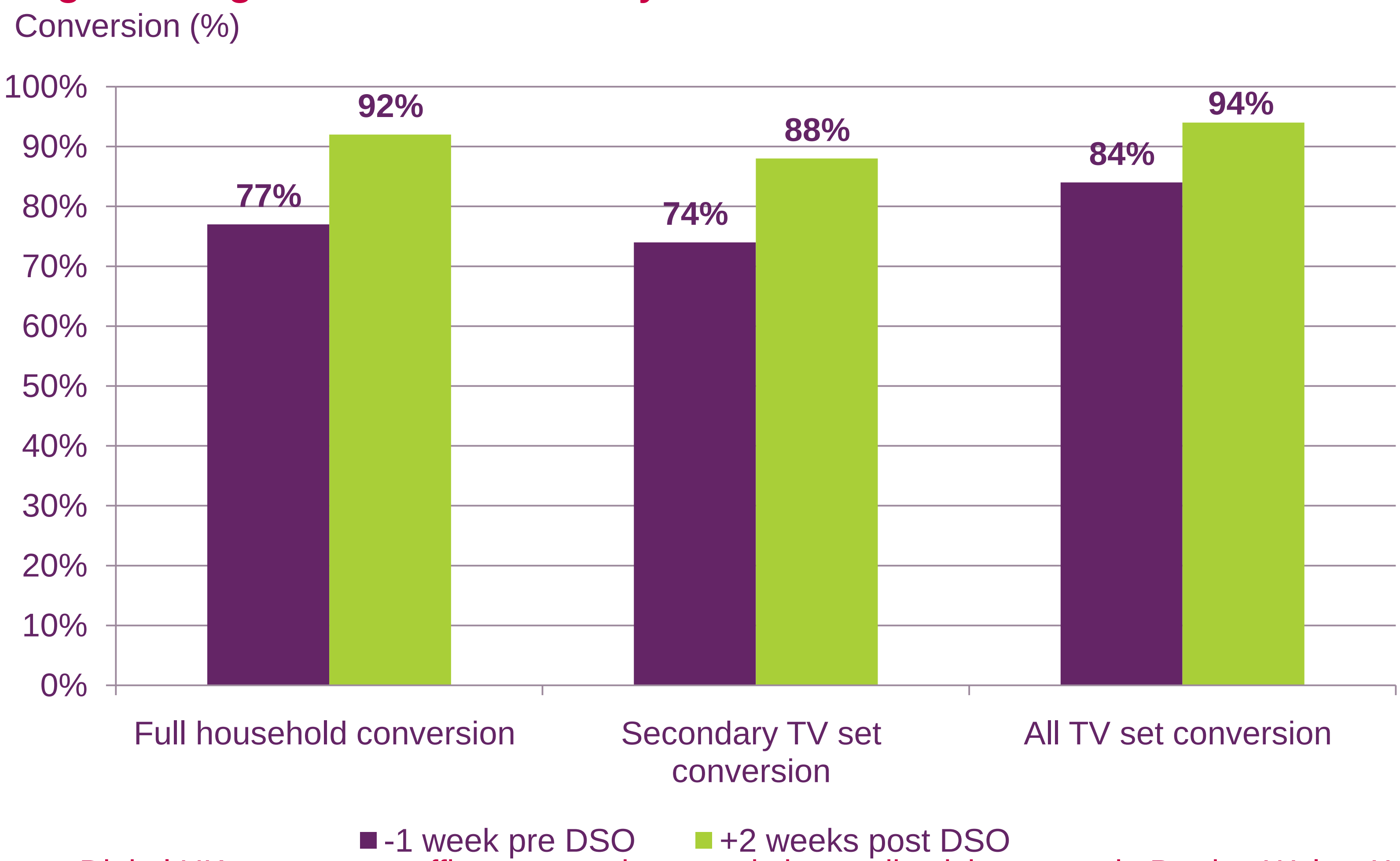
Average main TV set take-up across regions switched (Border, Wales, West Country, Granada and West)



Source: 2008 to 2010 Digital UK Switchover Tracker Survey, pre- and post-switchover dipstick surveys in Border, Wales, West Country Granada and West. Sample sizes n>150 respondents for all data points. *Owning equipment in preparation for switchover was only tracked from 6 months out point. Q Which, if any, of these types of television does your household receive at the moment?

Figure 2.26

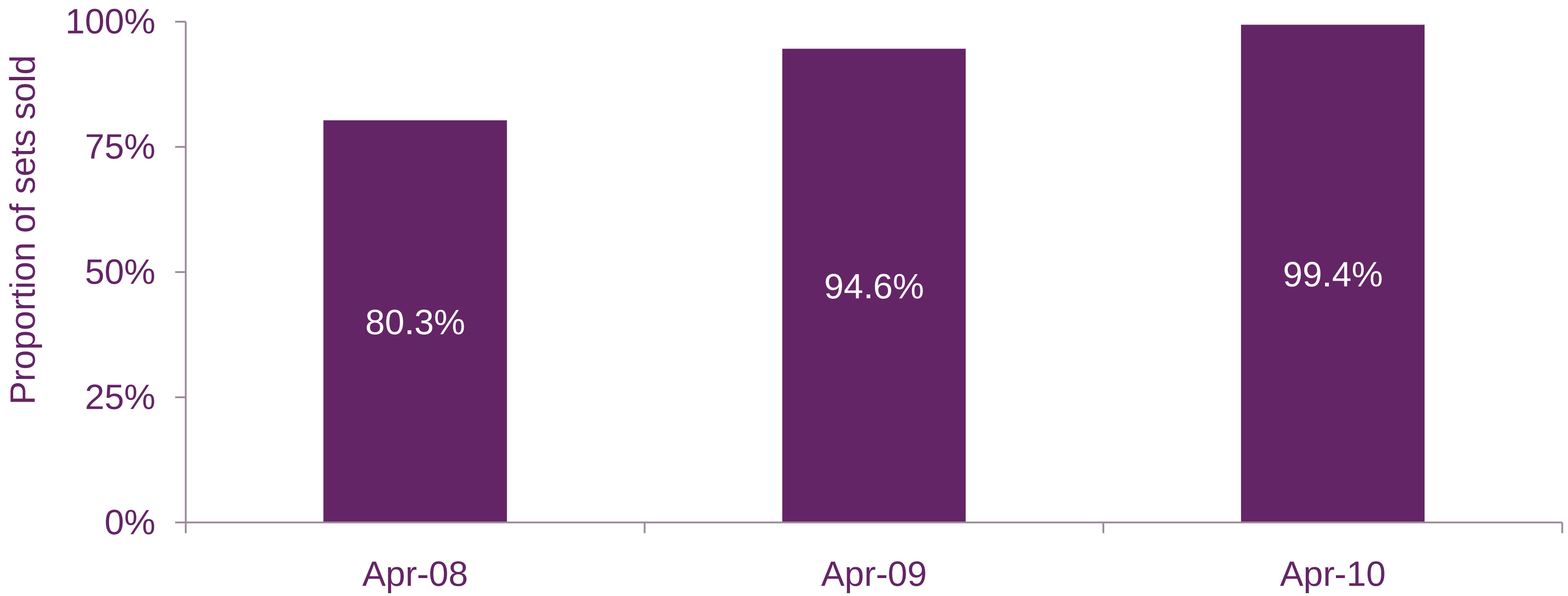
Digital TV growth on secondary sets, before and after switchover



Source: Digital UK programme office, pre- and post-switchover dipstick surveys in Border, Wales, West Country Granada and West, sample size n>150 respondents on each survey. Q Which, if any, of these types of television does your household receive at the moment?

Figure 2.27

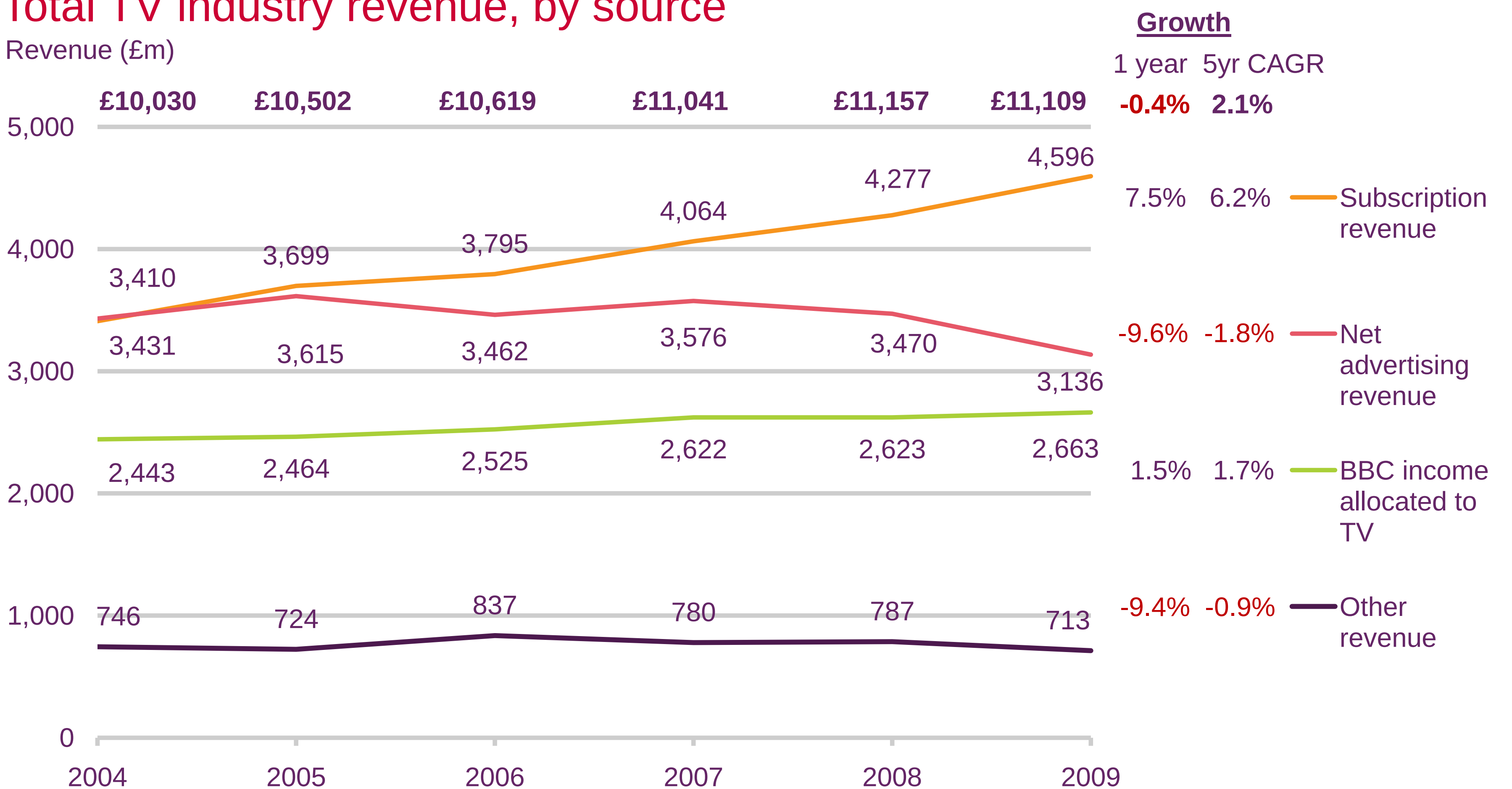
Sales of integrated digital TV sets as a proportion of all TV sets sold



Source: GfK Retail and Technology equipment sales data

Figure 2.28

Total TV industry revenue, by source

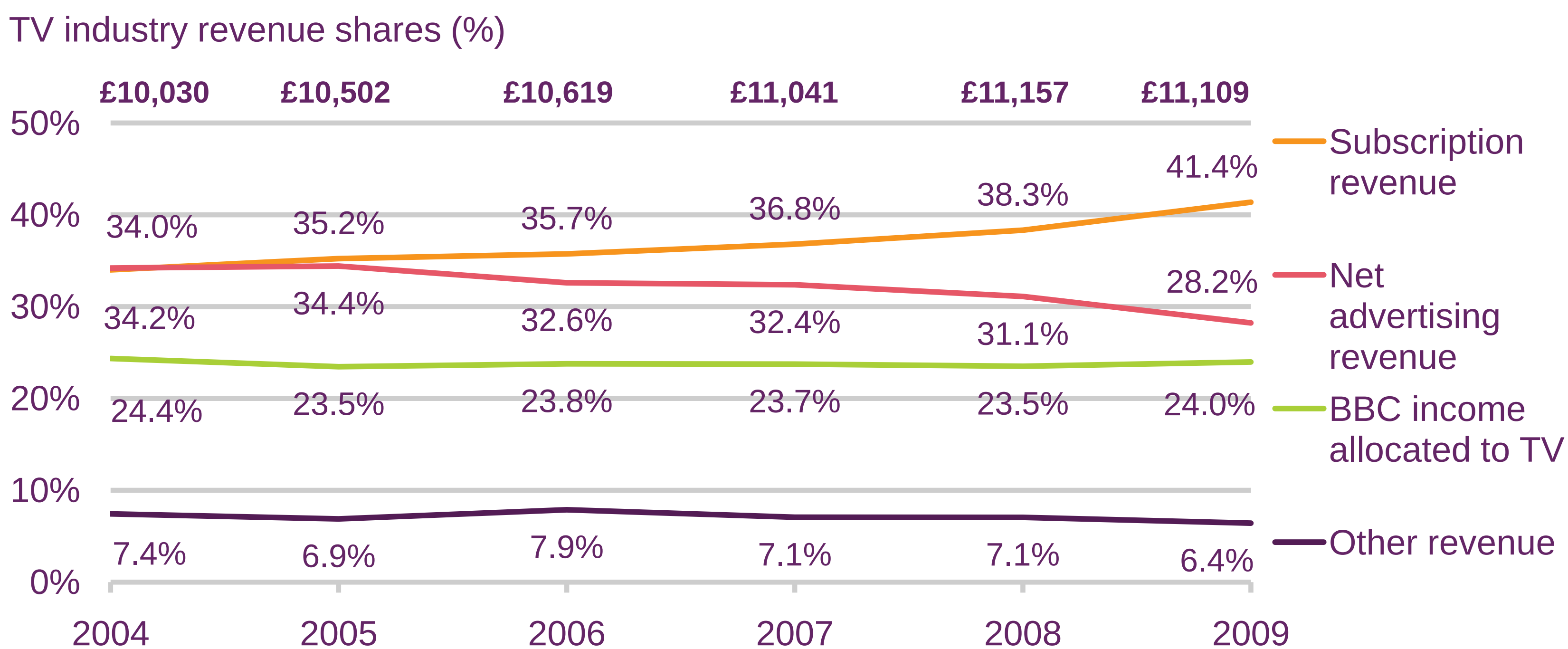


Source: Ofcom/broadcasters

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 BSkyB, Virgin Media, BT Vision, TalkTalkTV, Setanta Sports (until its closure), ESPN and Top Up TV television subscriber revenue in the UK (Republic of Ireland revenue is excluded). It also excludes revenue generated by broadband and telephony. 'Other' includes TV shopping,

Figure 2.29

TV industry revenues, by share

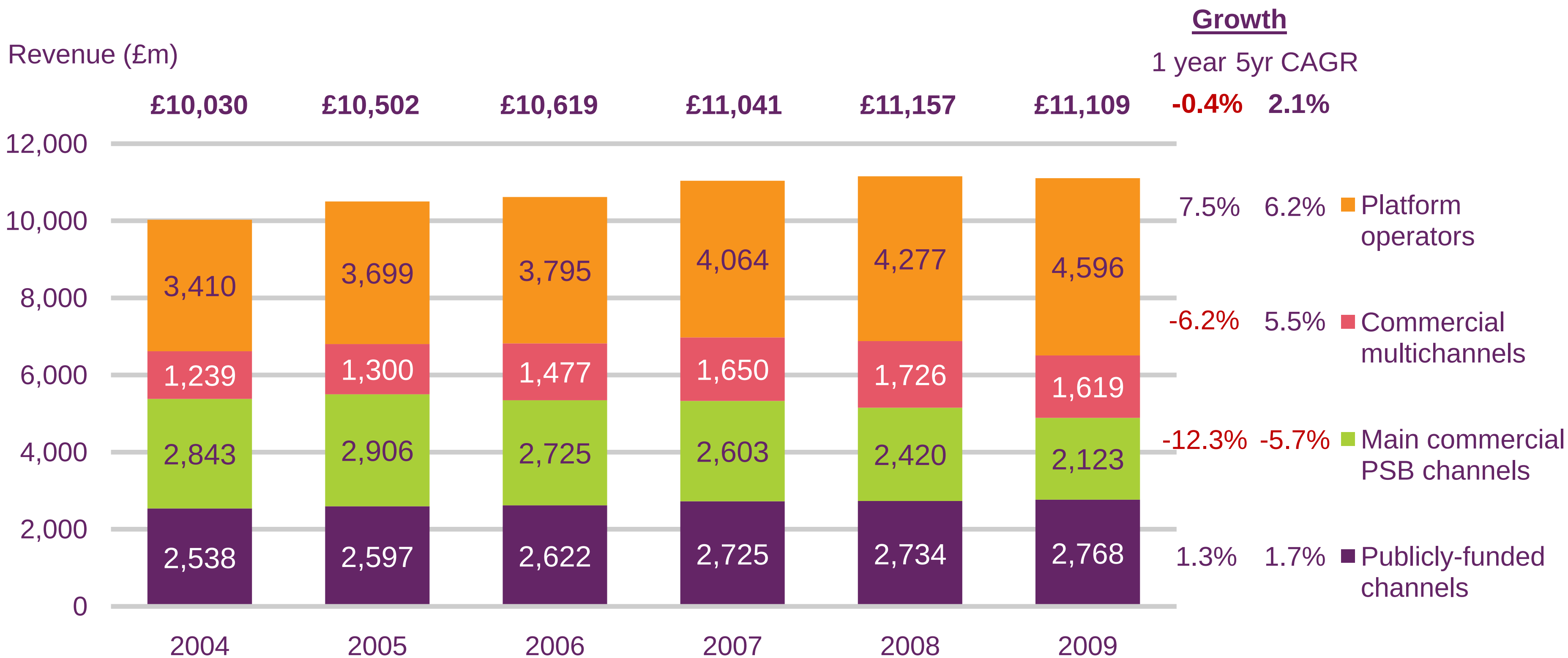


Source: Ofcom/broadcasters

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 BSkyB, Virgin Media, BT Vision, TalkTalkTV, Setanta Sports (until its closure), ESPN and Top Up TV television subscriber revenue 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. The BBC restated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

Figure 2.30

Total TV industry revenue by sector

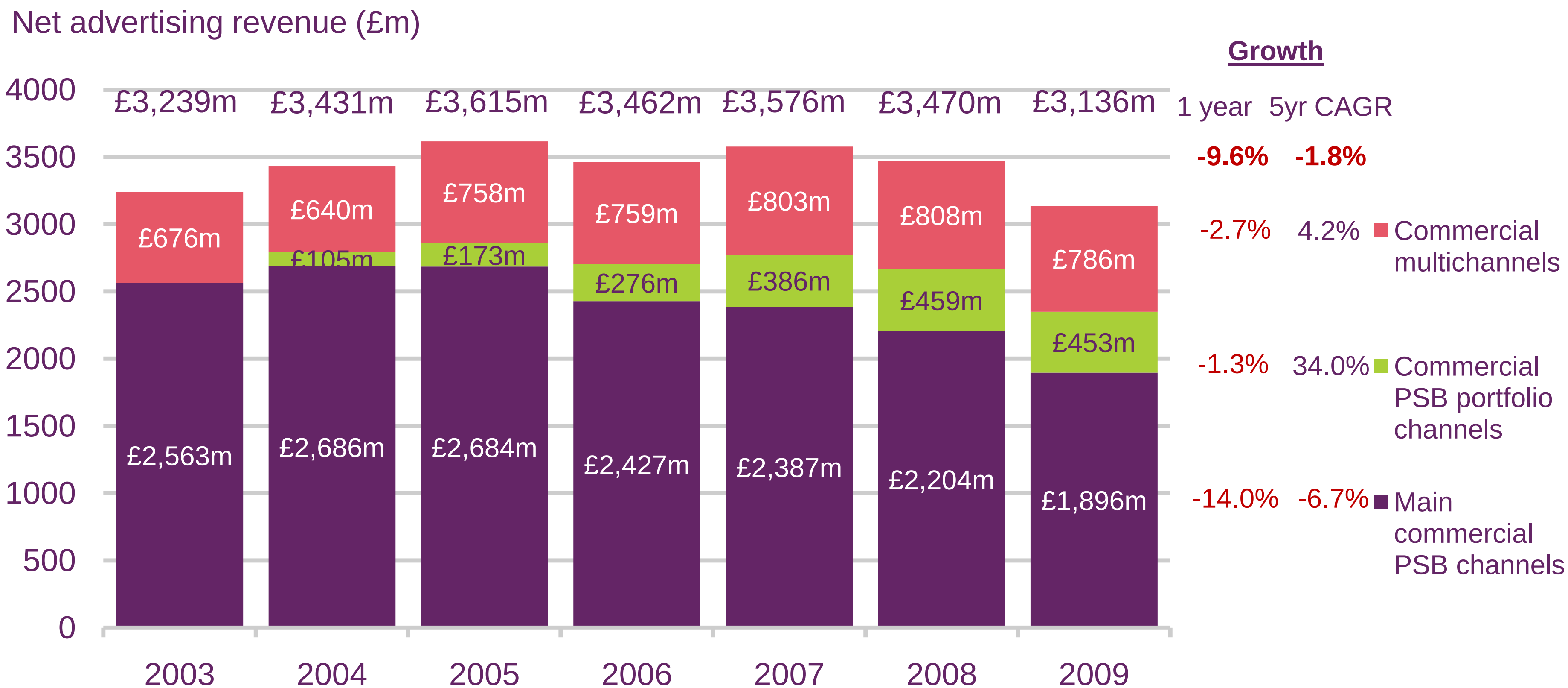


Source: Ofcom/broadcasters

Note: Figures expressed in nominal terms. Main commercial PSB channels comprise ITV1, STV, UTV, Channel Television, GMTV1, Channel 4, Five and S4C. Commercial multichannels comprise all multichannels other than those owned by ITV1, Channel 4 and Five. Publicly-funded channels comprise BBC One, BBC Two, the BBC's portfolio of digital-only television channels and S4C. S4C is listed under publicly-funded and commercial analogue channels because it has a mixed advertising and public funding model. The BBC restated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

Figure 2.31

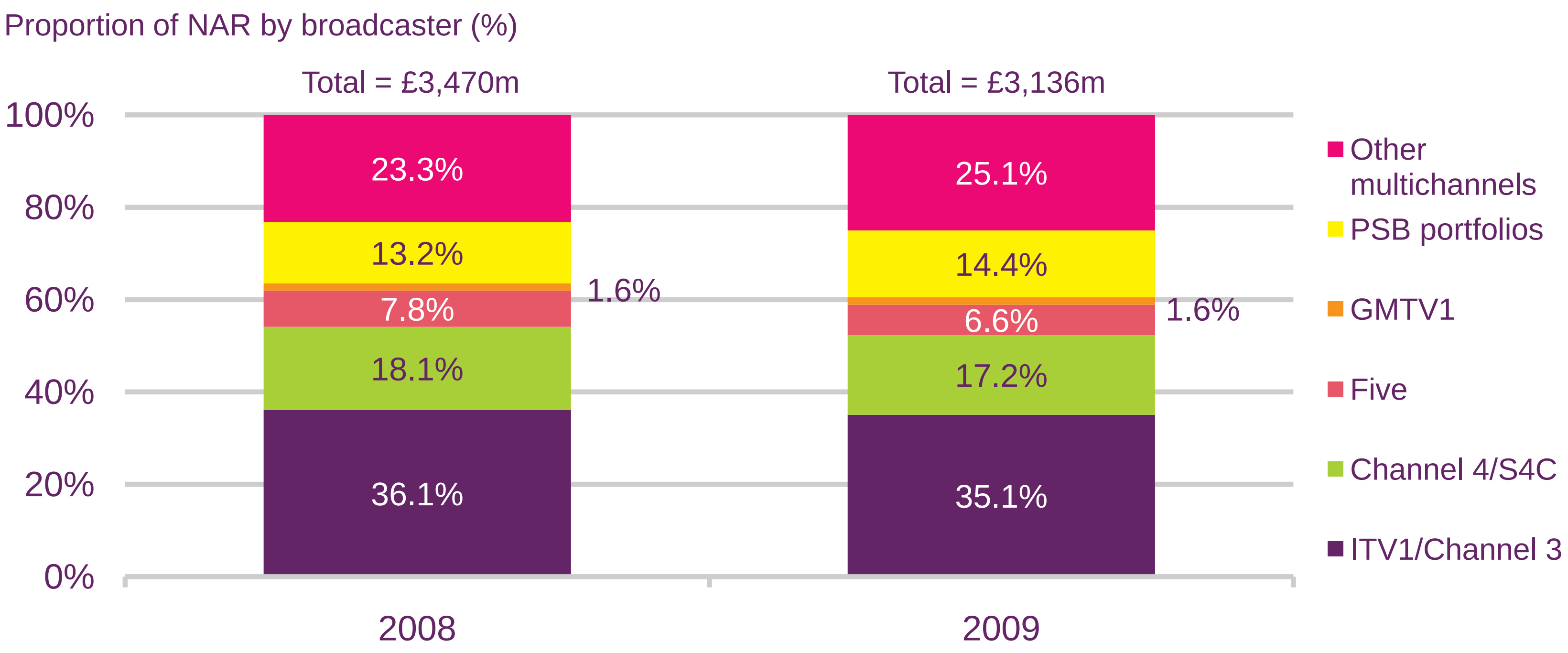
Net TV advertising revenue, by source



Source: Ofcom/broadcasters. Note: Figures expressed are in nominal terms and replace previous data published by Ofcom. Main commercial PSB channels comprise ITV1, STV, UTV, Channel Television, GMTV1, Channel 4, Five and S4C; Commercial PSB portfolio channels include ITV2, 3, 4, Men & Motors, CiTV, E4, More 4, Film 4, 4Music, Five USA and Fiver (plus their '+1' channels). For previous years closed channels have also been included. Sponsorship revenues are not included. Totals may not equal the sum of the components due to rounding.

Figure 2.32

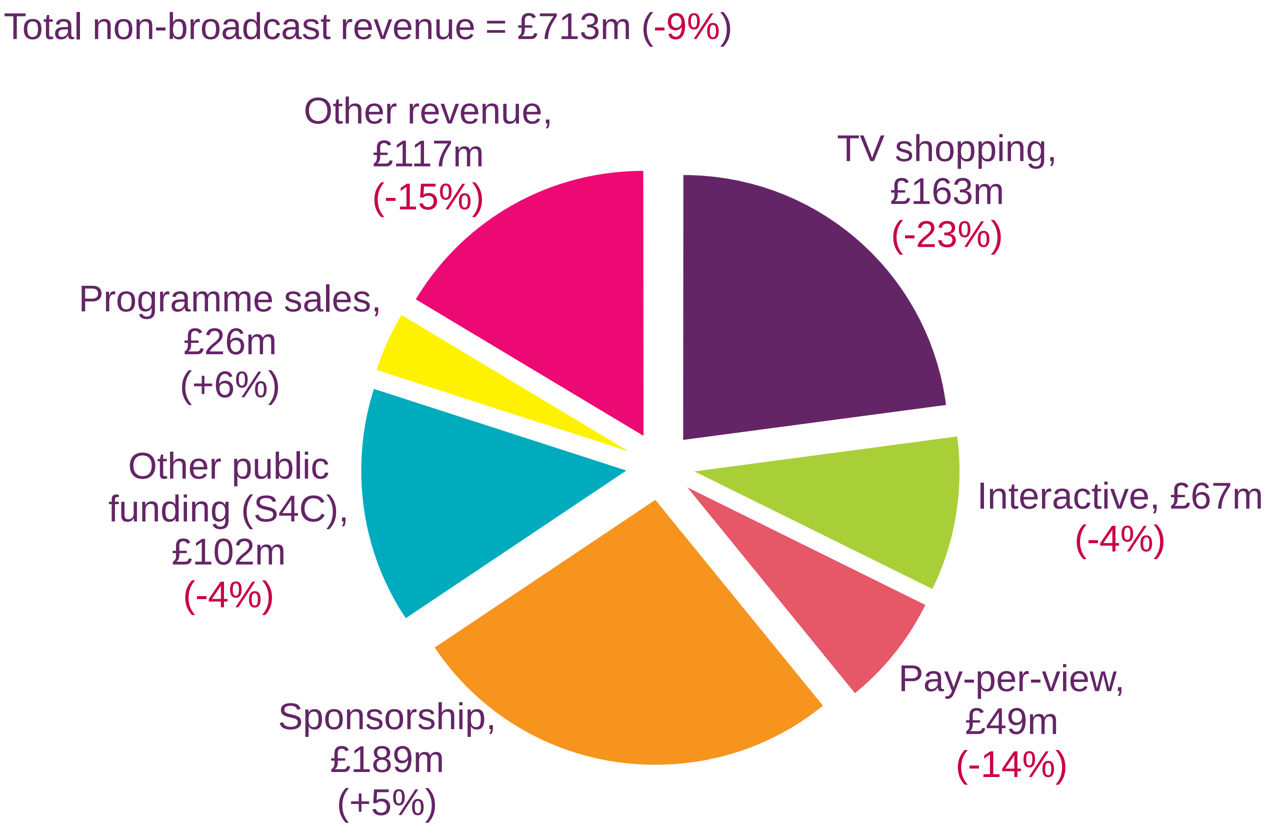
TV net advertising revenue market shares, 2008 - 2009



Source: Ofcom/broadcasters. Note: ITV1/Channel 3 includes ITV1, STV, UTV and Channel Television.

Figure 2.33

Breakdown of other/non-broadcast revenue, 2009

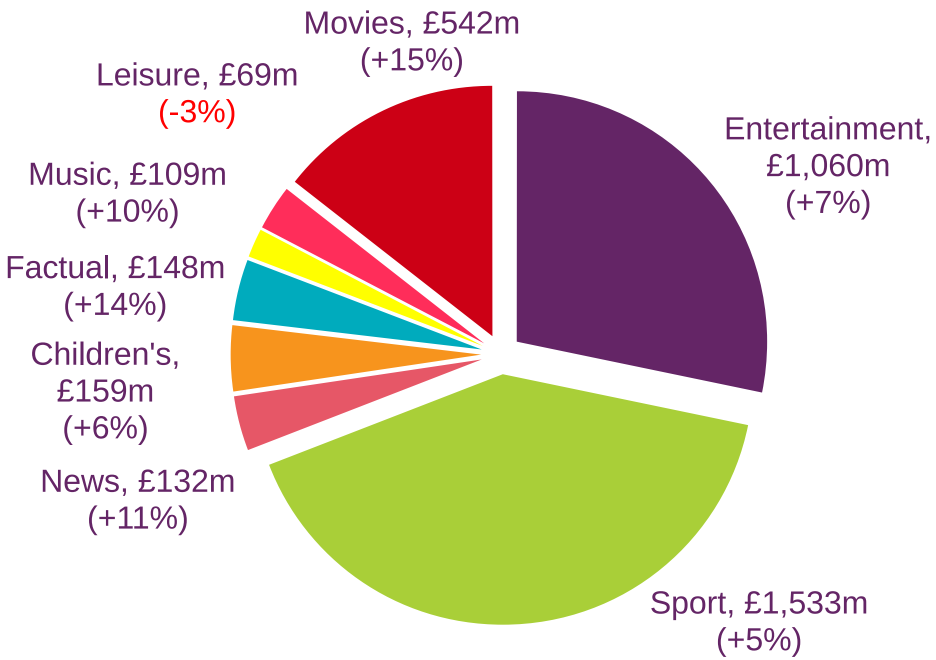


Source: Ofcom/broadcasters. Note: Percentage figures in brackets represent year-on-year change. TV shopping represents aggregate operating margin of products sold via television. Totals may not equal the sum of the components due to rounding.

Figure 2.34

Revenue generated by multichannel broadcasters, by genre, 2009

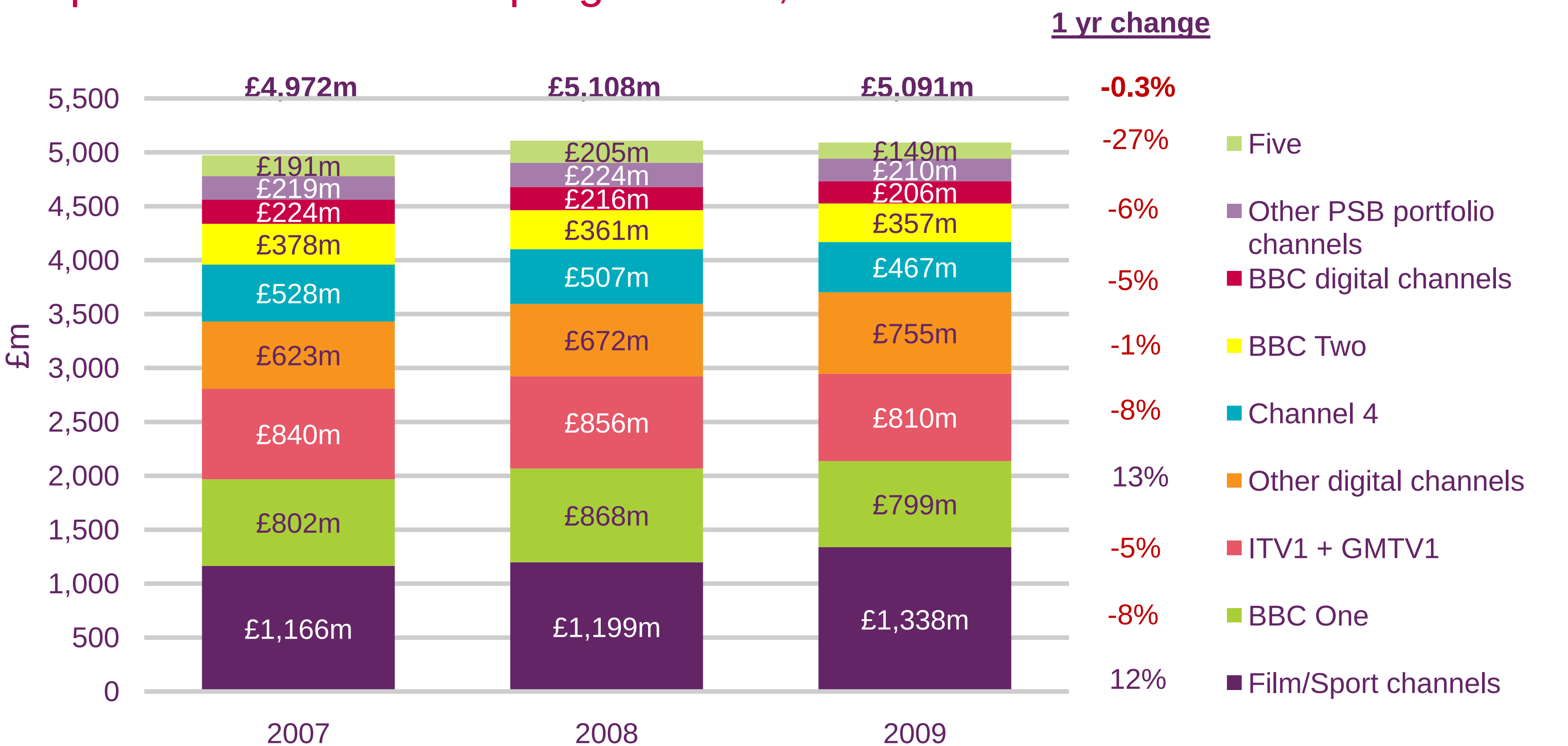
Total revenue = £ 3,751m across the eight genres included (+7%)



Source: Ofcom/broadcasters
Note: Percentage figures in brackets represent year-on-year change. 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 2.28 plus wholesale subscriber payments from platform operators.

Figure 2.35

Spend on network TV programmes, 2007 - 2009

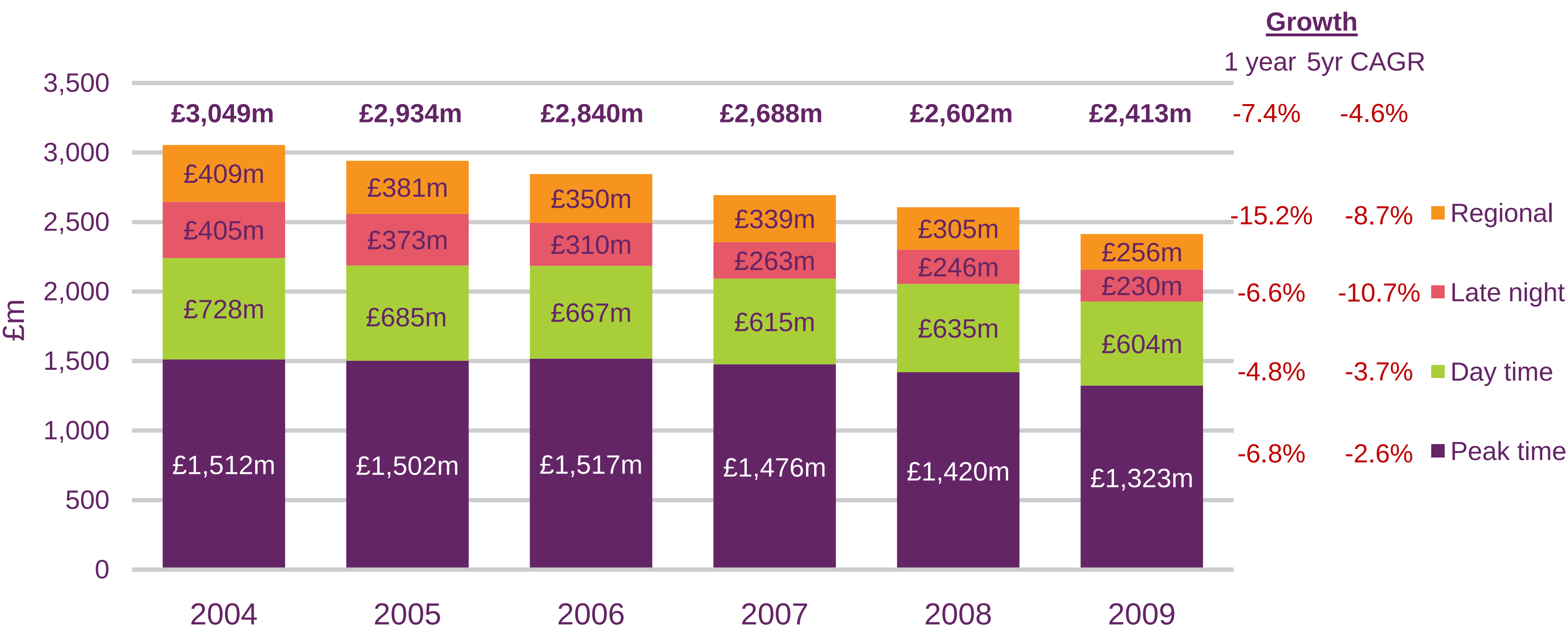


Source: Ofcom/broadcasters.

Note: Figures expressed in nominal terms. Figures do not include spend on nations and regions output. BBC digital channels includes BBC Three, BBC Four, BBC News Channel, BBC Parliament, CBBC and CBeebies (but not BBC HD). ‘Other digital channels’ include all genres (excluding Sports and Films). Programme spend comprises in-house commissions, productions, commissions from independents, spend on acquired programmes, spend on rights and repeats.

Figure 2.36

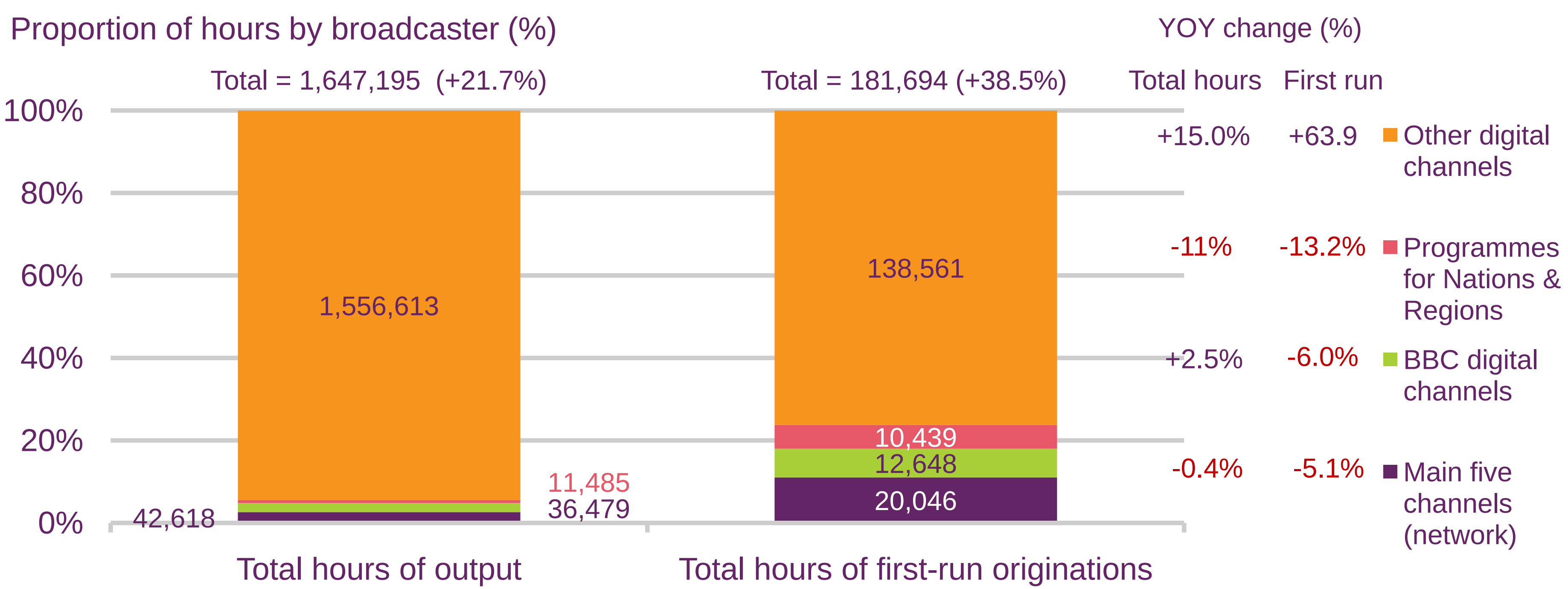
Spend on first-run originated output on the five main networks



Source: Ofcom/broadcasters.
Note: Figures are expressed in 2009 prices. They include GMTV1, 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 digital channels.

Figure 2.37

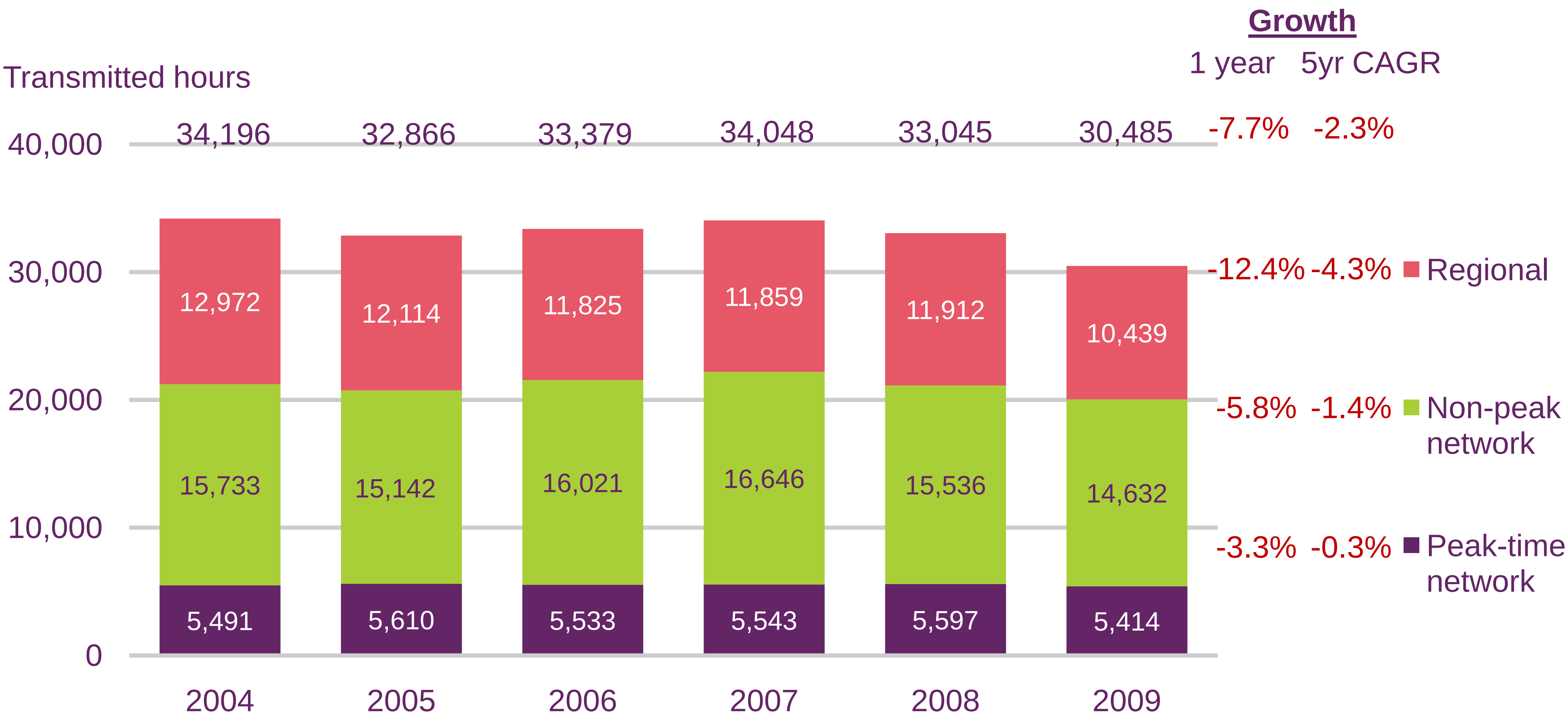
Total and first-run originated hours of output, all day, 2009



Source: Ofcom/broadcasters
Note: Percentage figures in brackets represent year-on-year change. The first-run figures include in-house productions and external commissions, not first-run acquisitions. GMTV1 is included within the figures for the five main channels. 'Other digital channels' includes Entertainment, Sports, Film, Factual, Children's, News, Leisure and Music genres. Regional hours exclude Welsh and Gaelic-language programming but do include a small proportion of Irish-language programmes.

Figure 2.38

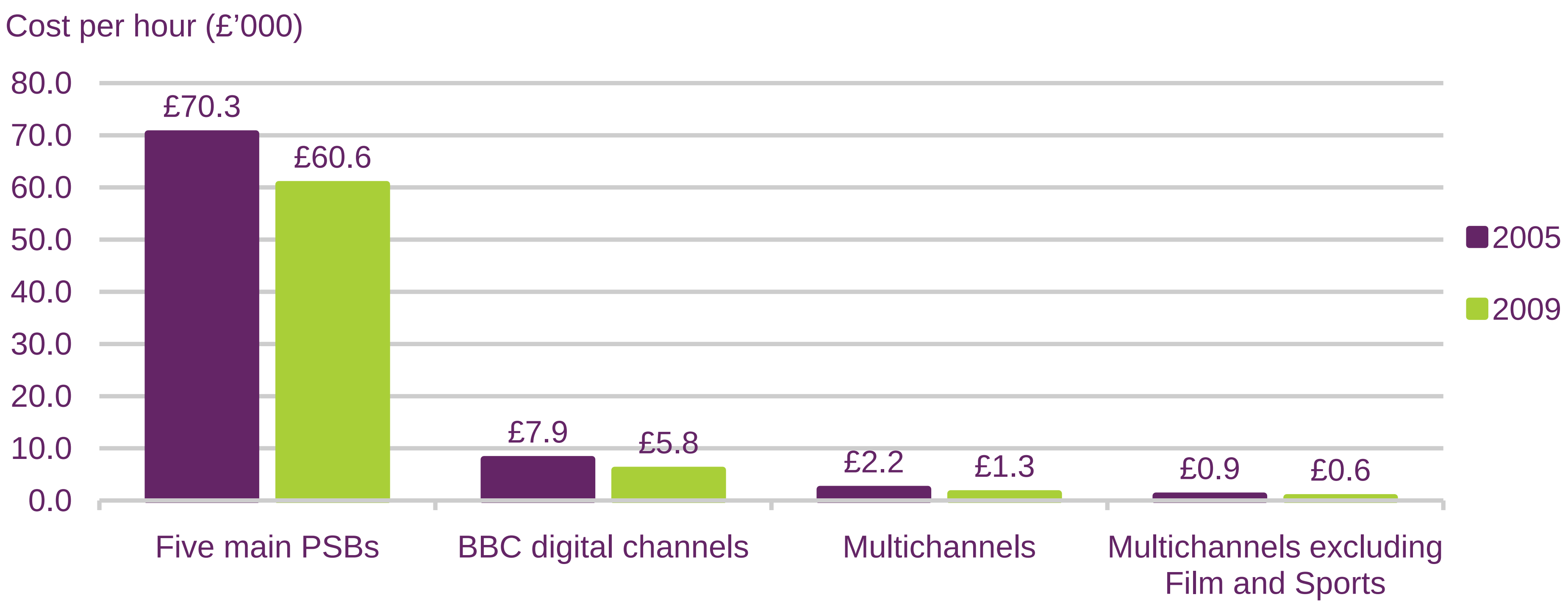
Hours of first-run originated output on the five main channels



Source: Ofcom/broadcasters. Note: Figures include GMTV1 but do not include the BBC's digital channels. Regional hours exclude Welsh and Gaelic-language programming but do include a small proportion of Irish-language programmes.

Figure 2.39

Cost per hour for five main PSB networks and multichannel broadcasters



Source: Ofcom/broadcasters. Note: Figures are expressed in real terms. Data for five main PSBs include GMTV1 and are for network channels. BBC digital channels include BBC Three, BBC Four, BBC News 24, BBC Parliament, CBBC, CBeebies and BBC HD. Multichannels include commercial channels in the eight key genre categories of Entertainment, Children's, Factual, Sports, News, Leisure, Music and Film.

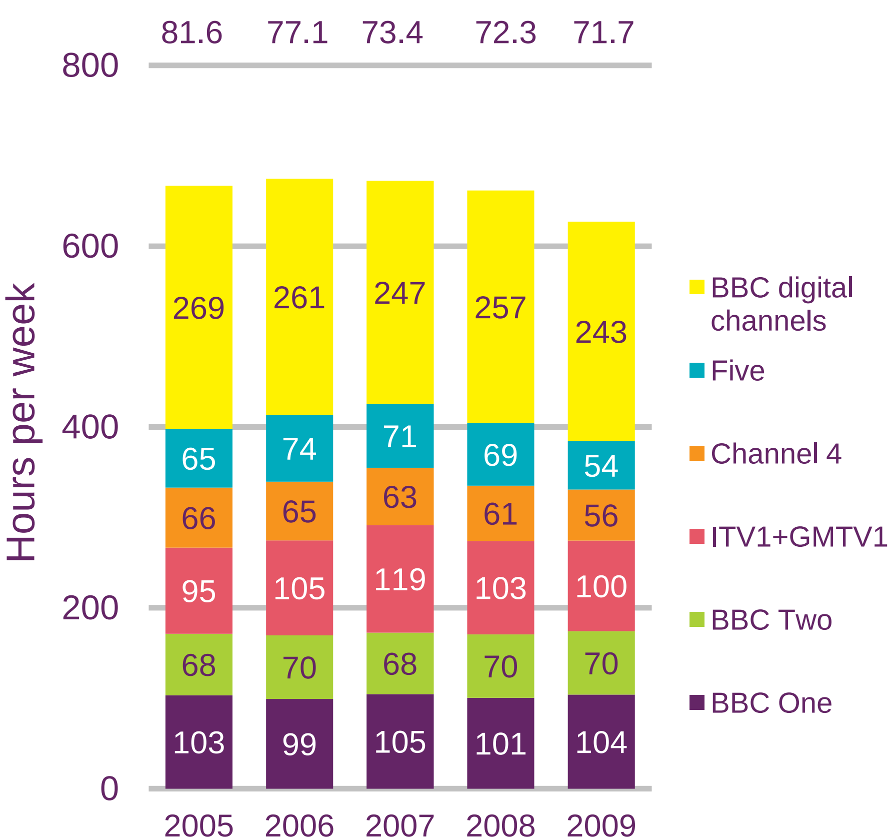
Figure 2.40

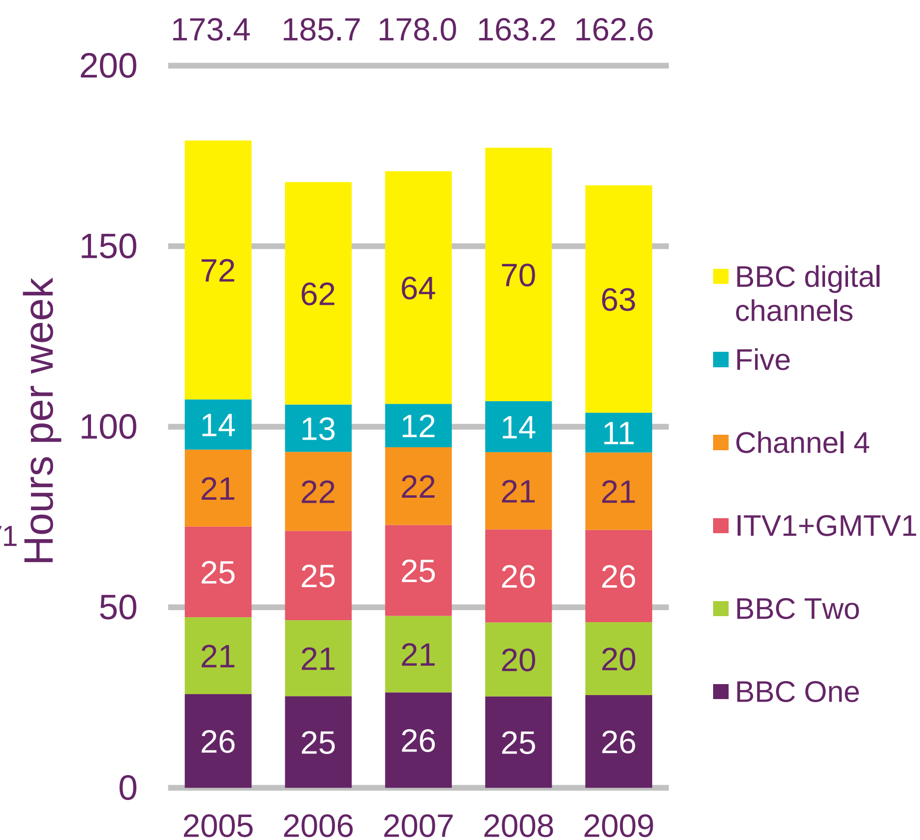
Cost per hour for first-run originated content on the five main networks

Source: Ofcom/broadcasters. Note: Figures are expressed in 2009 prices. They include GMTV1 but do not include the BBC's digital channels.

Figure 2.41

First-run originated output by the PSBs, all day and peak time

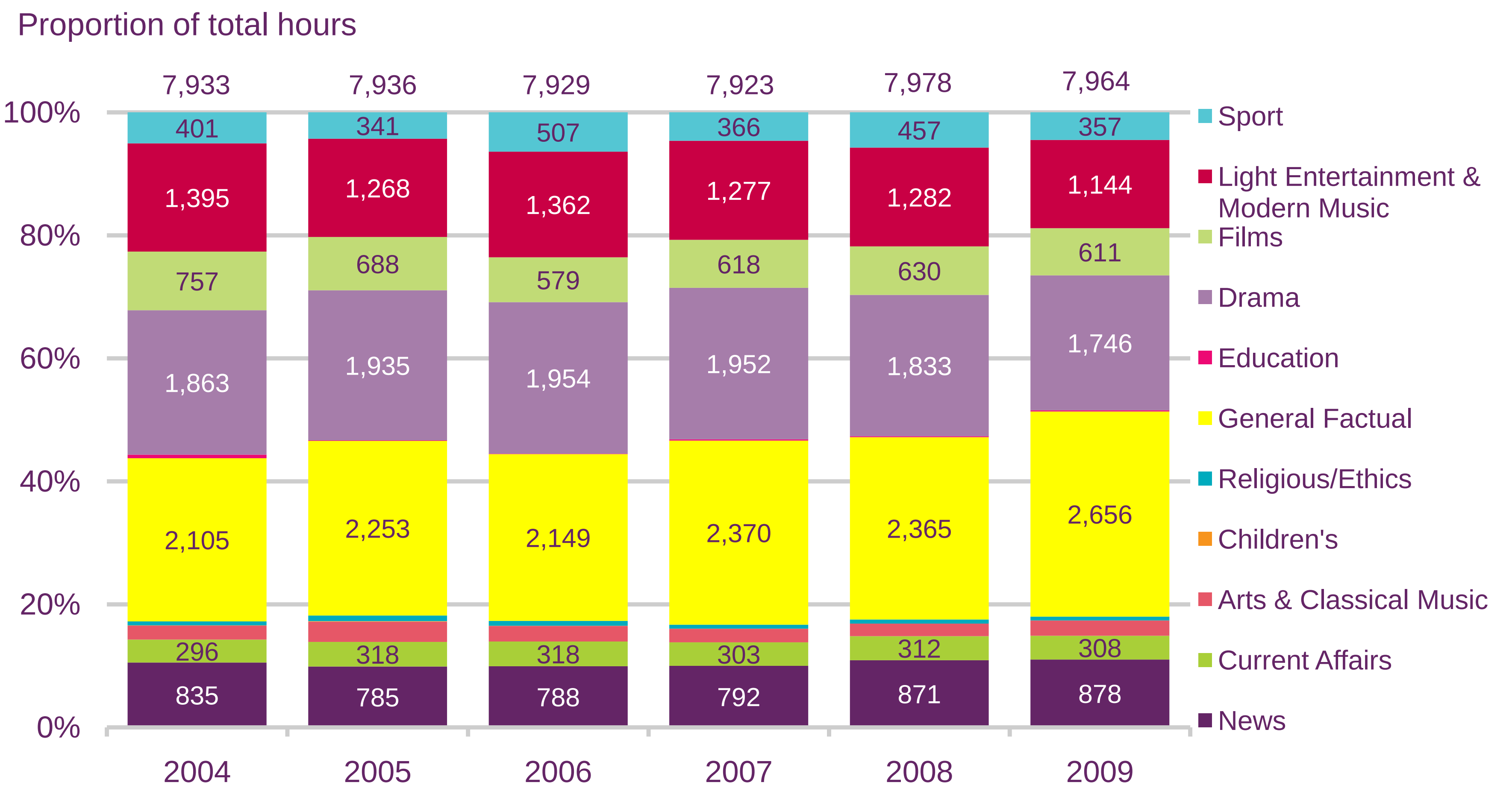




Source: Ofcom/broadcasters.
Note: Figures do not include spend on nations and regions output.

Figure 2.42

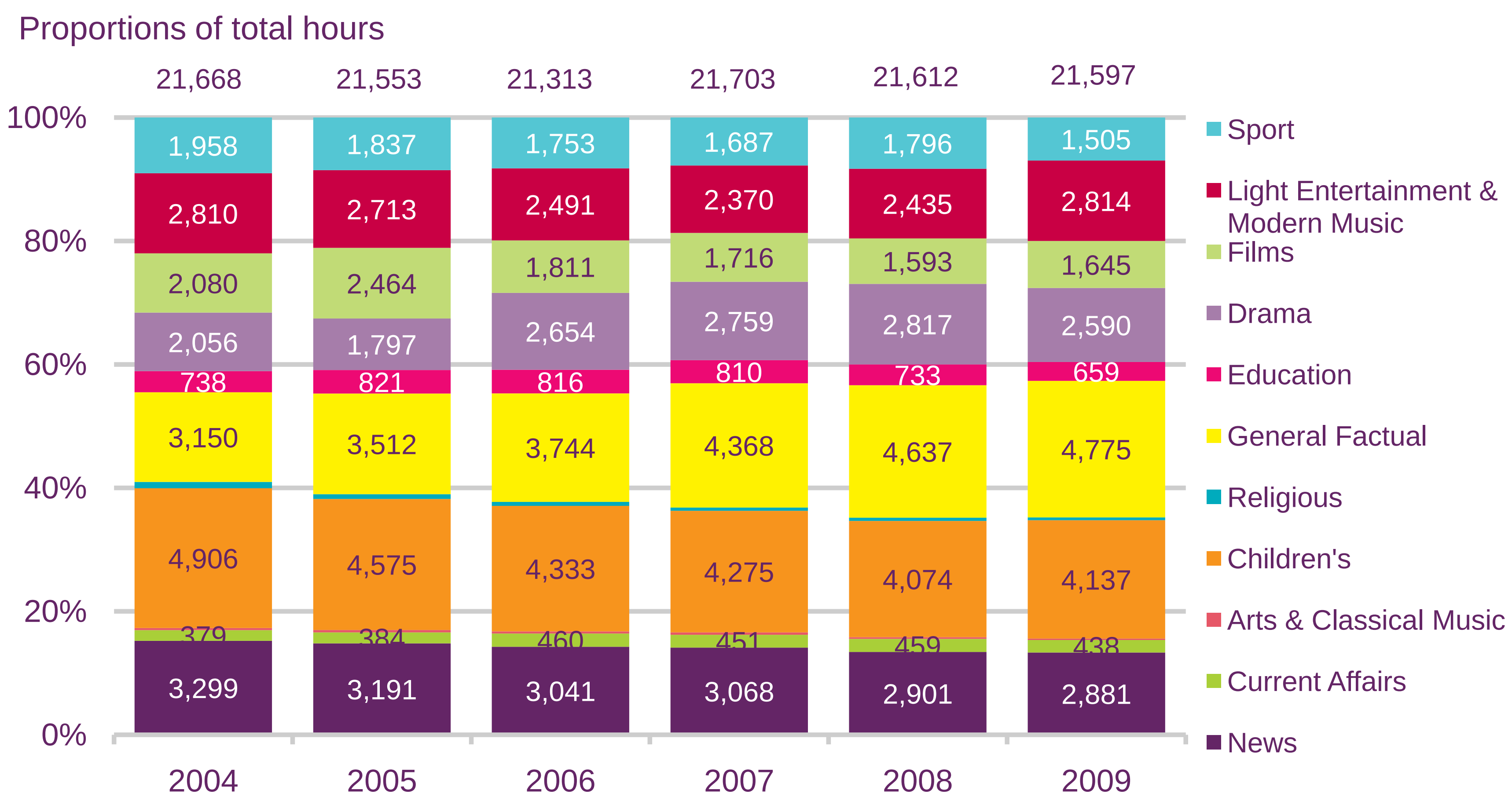
Genre mix on five main PSB channels in peak time, by hours



Source: Ofcom/Broadcasters.
Note: Figures do not include spend on nations and regions output.

Figure 2.43

Genre mix on five main PSB channels in daytime

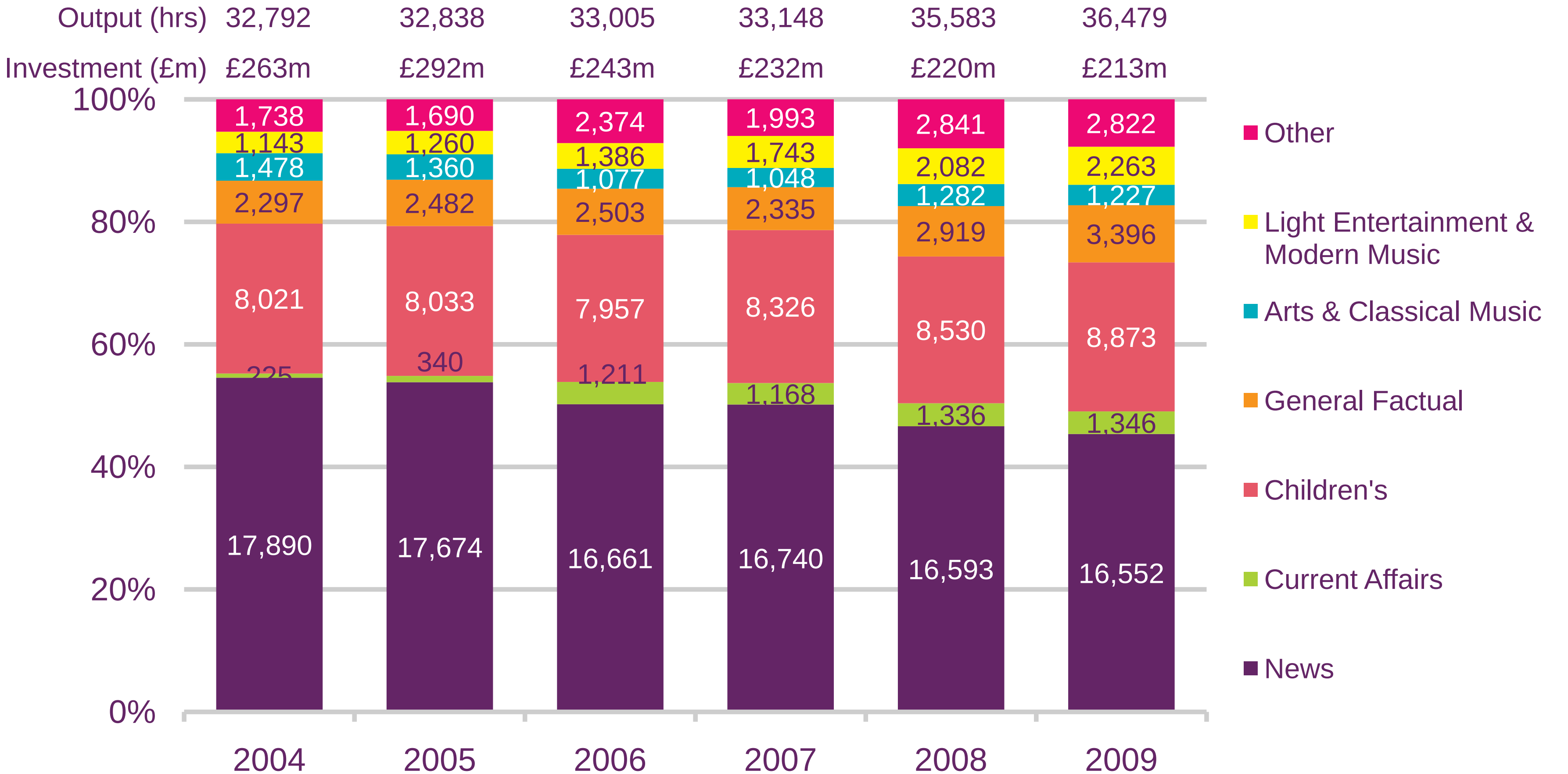


Source: Ofcom/Broadcasters

Note: Includes five main channels plus GMTV1. Figures do not include spend on nations and regions output.

Figure 2.44

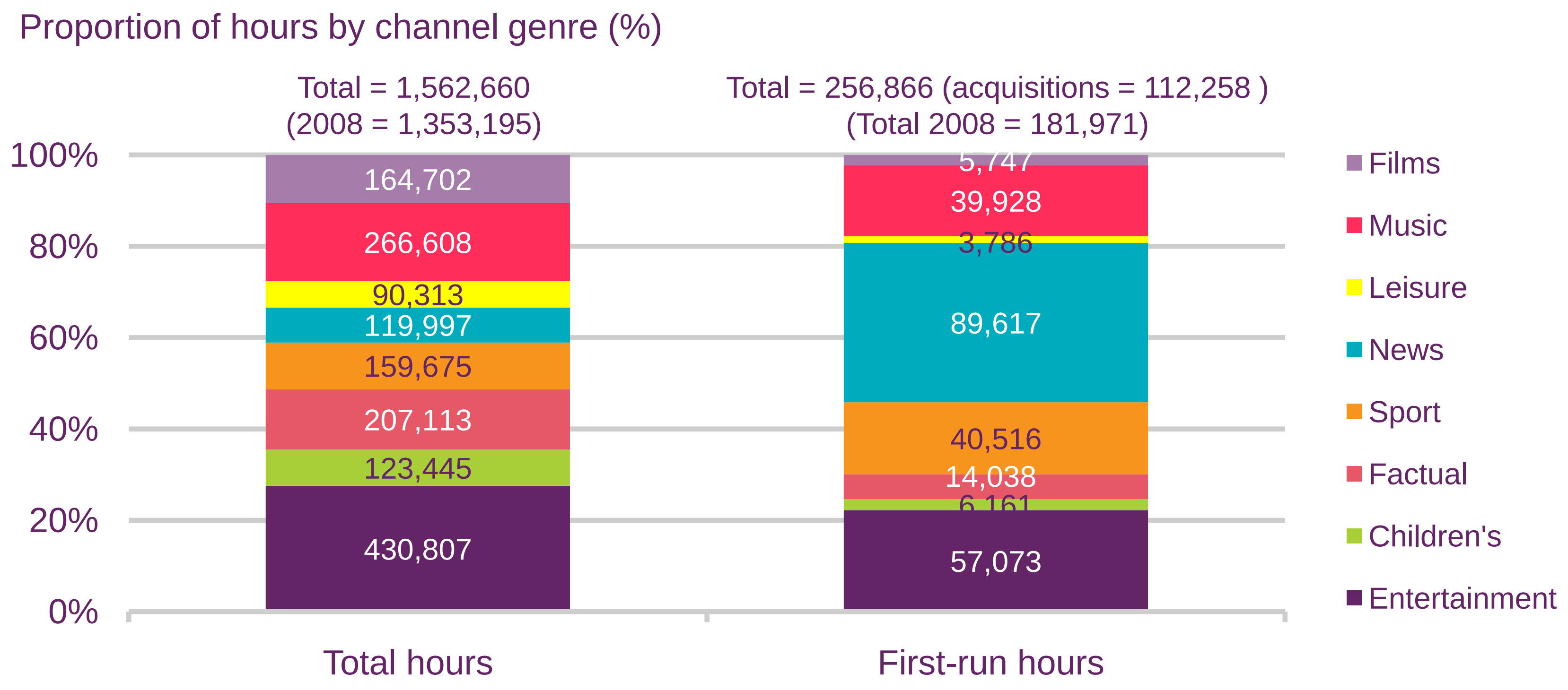
The BBC's digital channels genre mix by hours (all day)



Source: Ofcom/broadcasters. Note: BBC digital channels include BBC Three, BBC Four, BBC News 24, BBC Parliament, CBBC, CBeebies and BBC HD. Investment figures are in 2009 prices. Other includes: Education, Drama, Film, Religion and Sports. The BBC allocated Parliamentary coverage to the Current Affairs genre in the data for 1998 to 2003. From 2004, it has been allocated to either News or Current Affairs.

Figure 2.45

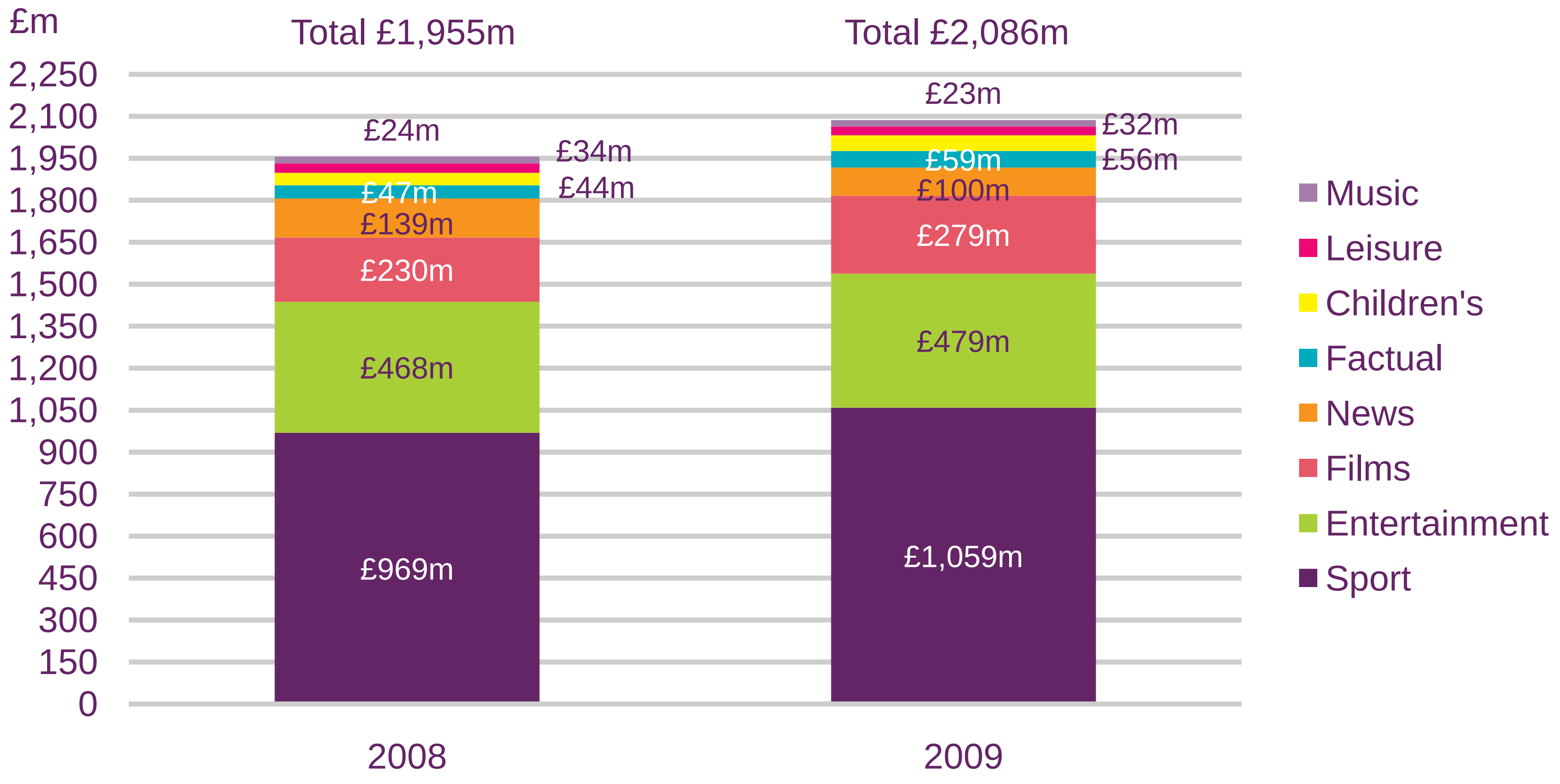
Total multichannel hours and first-run originations/acquisitions, 2009



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

Figure 2.46

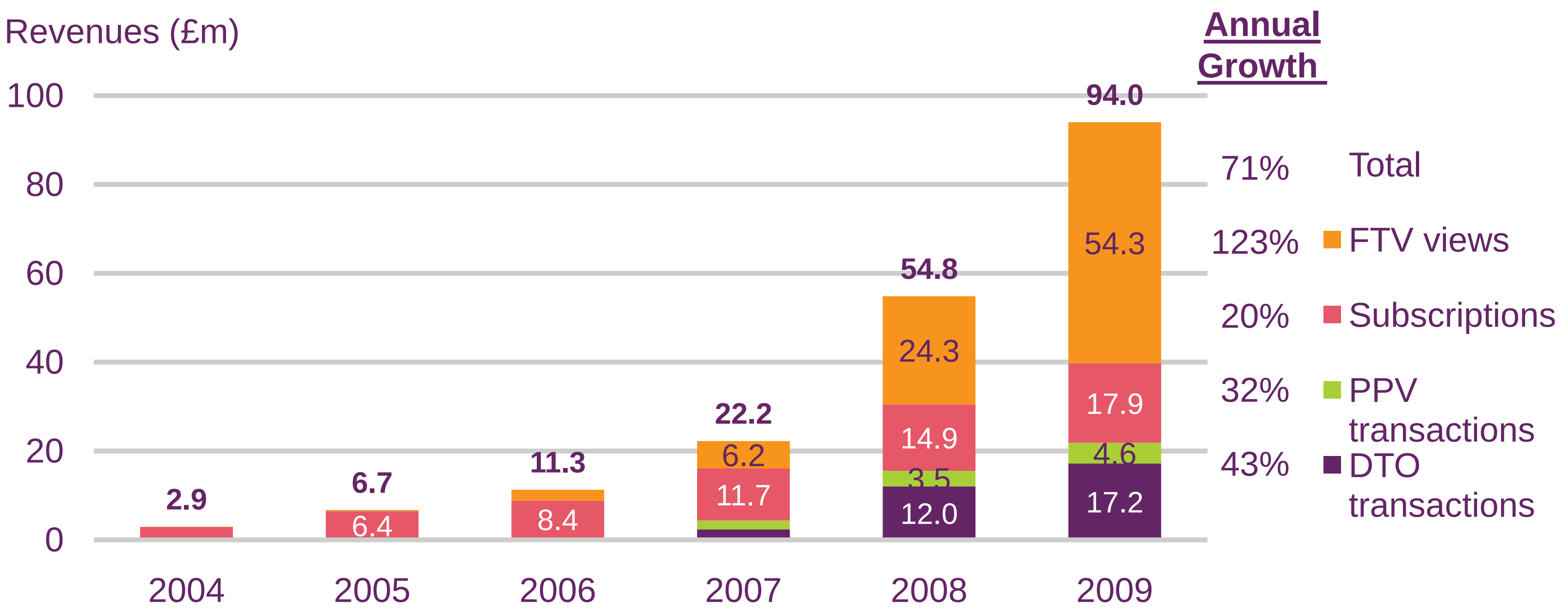
Content spend by commercial multichannels in key genres, 2008 - 2009



Source: Ofcom/broadcasters.
Note: Excludes BBC digital channels.

Figure 2.47

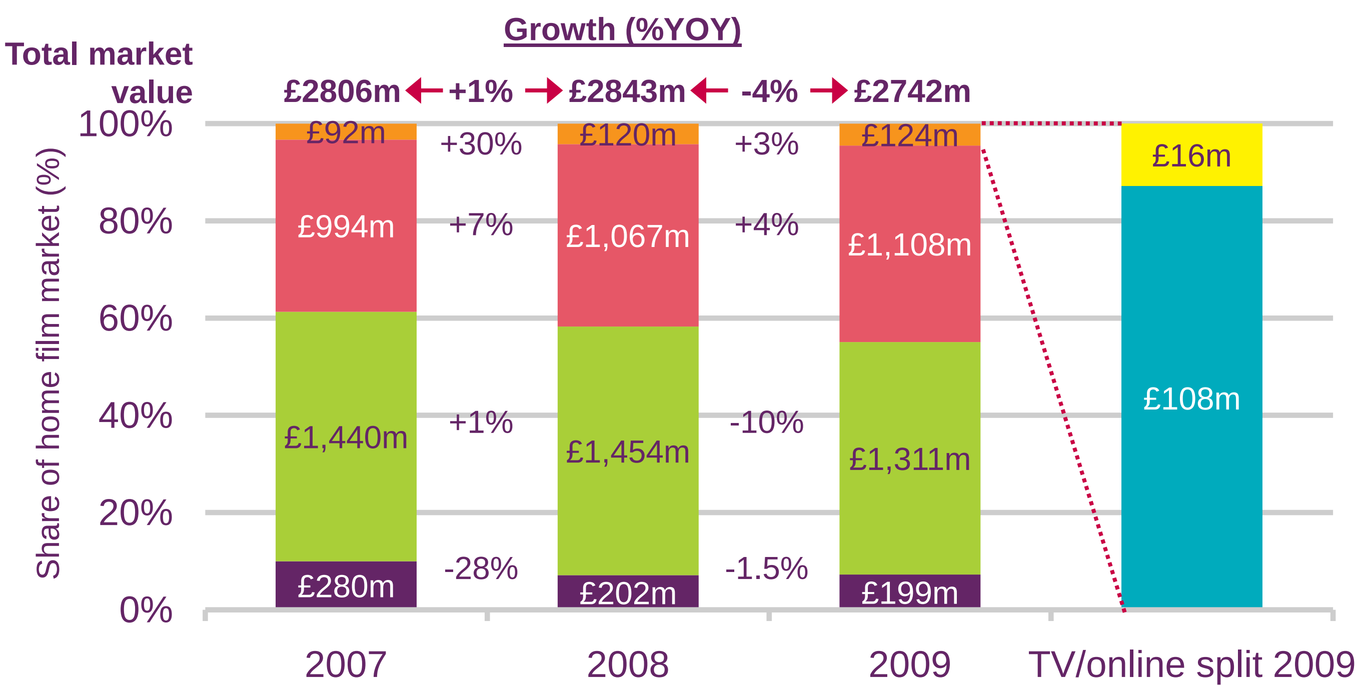
Online TV revenues



Source: Screen Digest.
Note: FTV = free to view; PPV = pay per view; DTO = download to own.

Figure 2.48

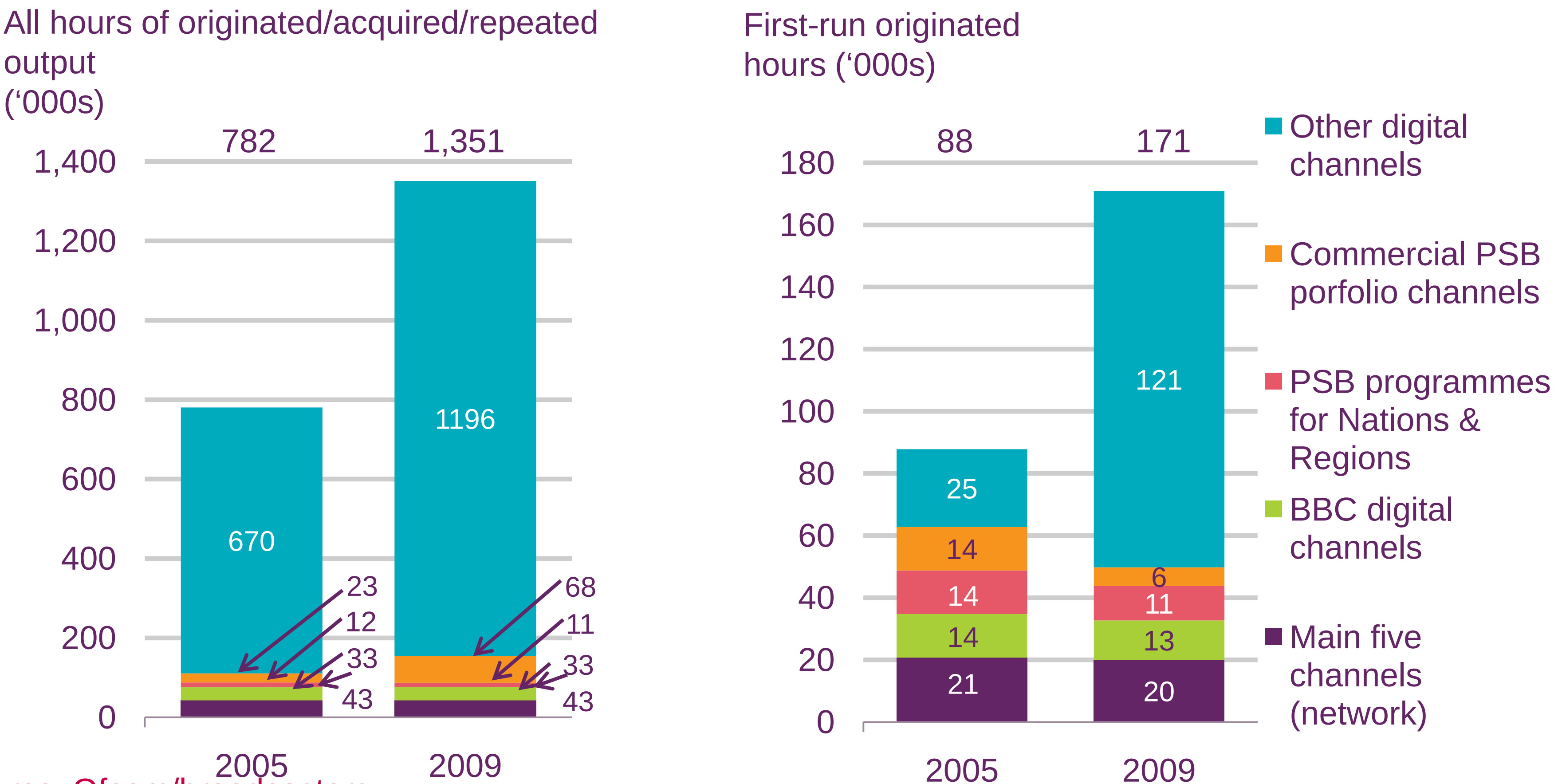
Value of UK home film market, and online revenue split



Source: UK Film Council/Ofcom based on Nielsen EDI, MRIB, BVA, Official Charts Company, Attentional, Screen Digest, RSU Analysis.
Note: 'TV' is the market value of film content shown on pay-TV, terrestrial TV and free-multichannel TV. Pay-per-view is included in 'nVoD'.

Figure 2.49

Total broadcast hours and first-run originated hours on all channels, 2005 – 2009

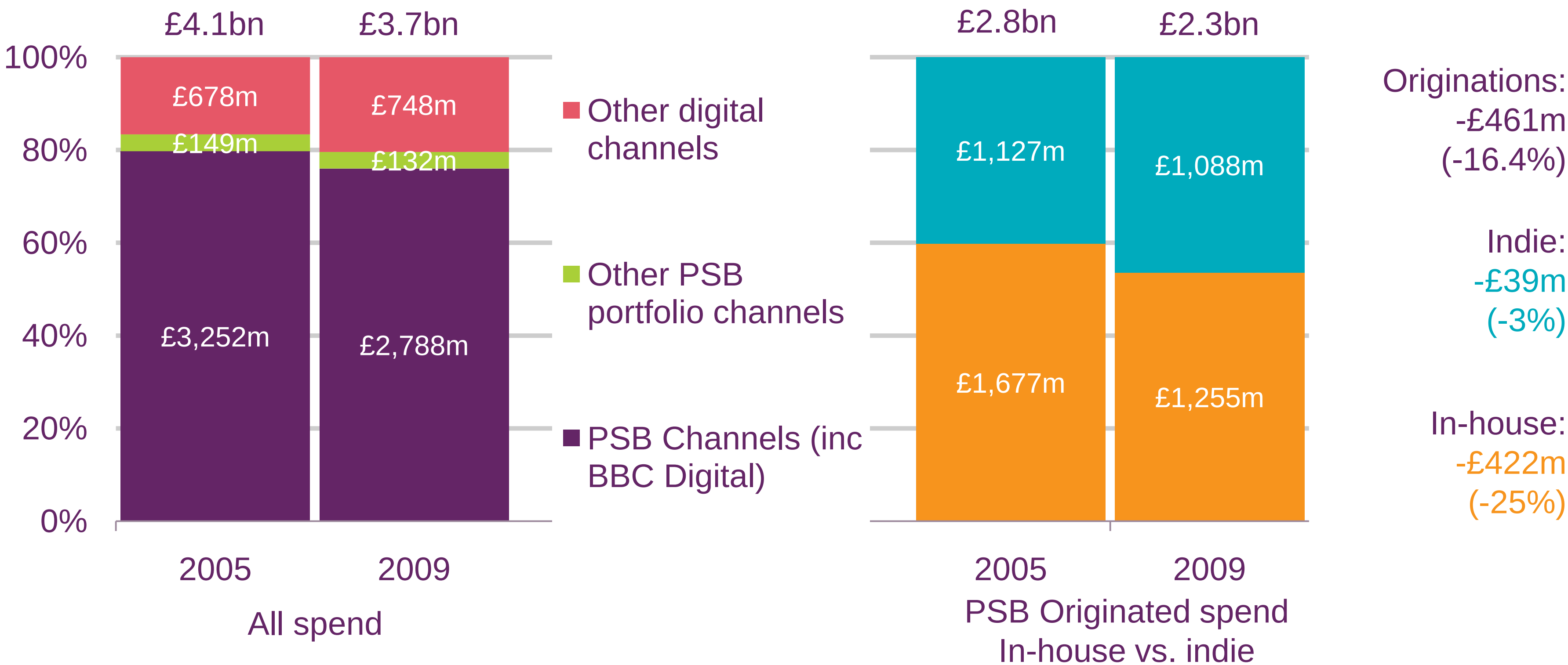


Source: Ofcom/broadcasters.
Note: The first-run figures include in-house productions and external commissions, not first-run acquisitions. 'Other digital channels' includes Entertainment, Factual, Children's, News, Leisure and Music genres.

Figure 2.50

Total broadcast spend on all channels, 2005 – 2009

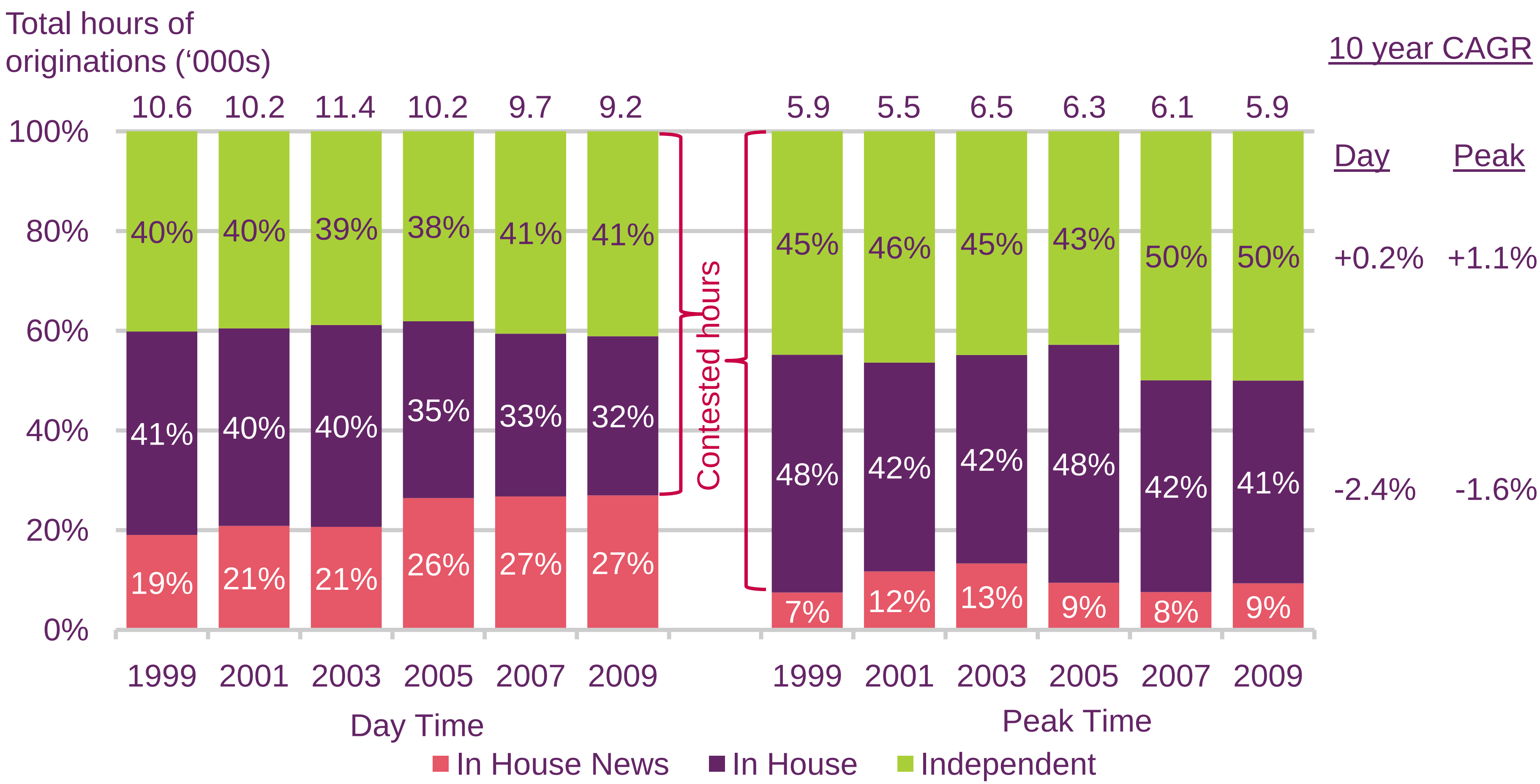
Spend on TV output



Source: Ofcom/broadcasters.
Note: Figures do not include nations & regions. BBC digital channels include BBC Three, BBC Four, BBC News, BBC Parliament, CBBC and CBeebies. GMTV included. 'Digital-only commercial channels' include all genres (excluding Sports and Film). Programme spend comprises in-house commissions, independent commissions, acquired programmes, rights and repeats. Figures expressed in 2009 prices.

Figure 2.51

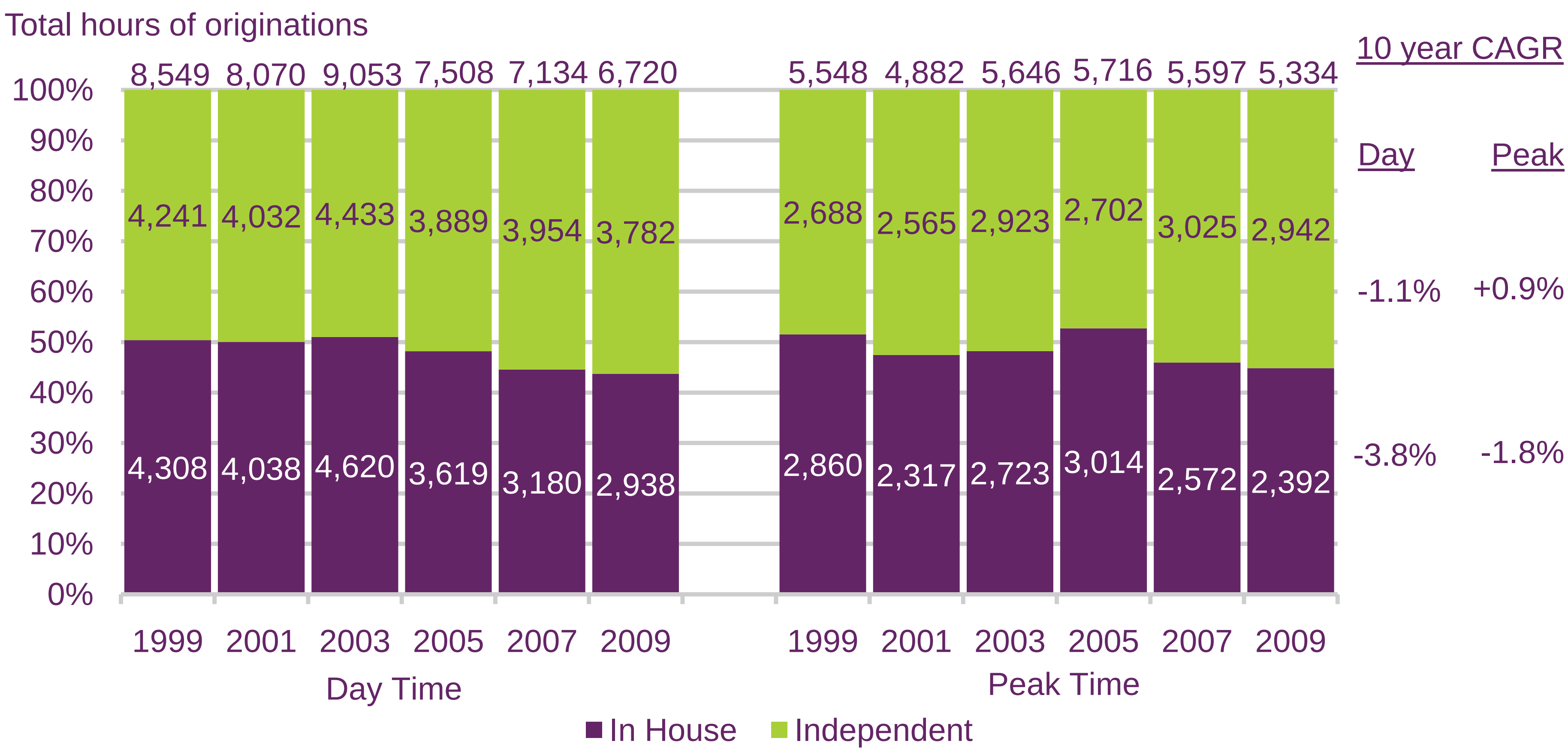
PSB Originations volume by hours - daytime and peak time 1999 – 2009



Source: Ofcom/broadcasters.
Chart Includes five main networks, BBC Three, BBC Four, CBBC and Cbeebies only. News is shown separately as its hours are not included when calculating the independent quota.

Figure 2.52

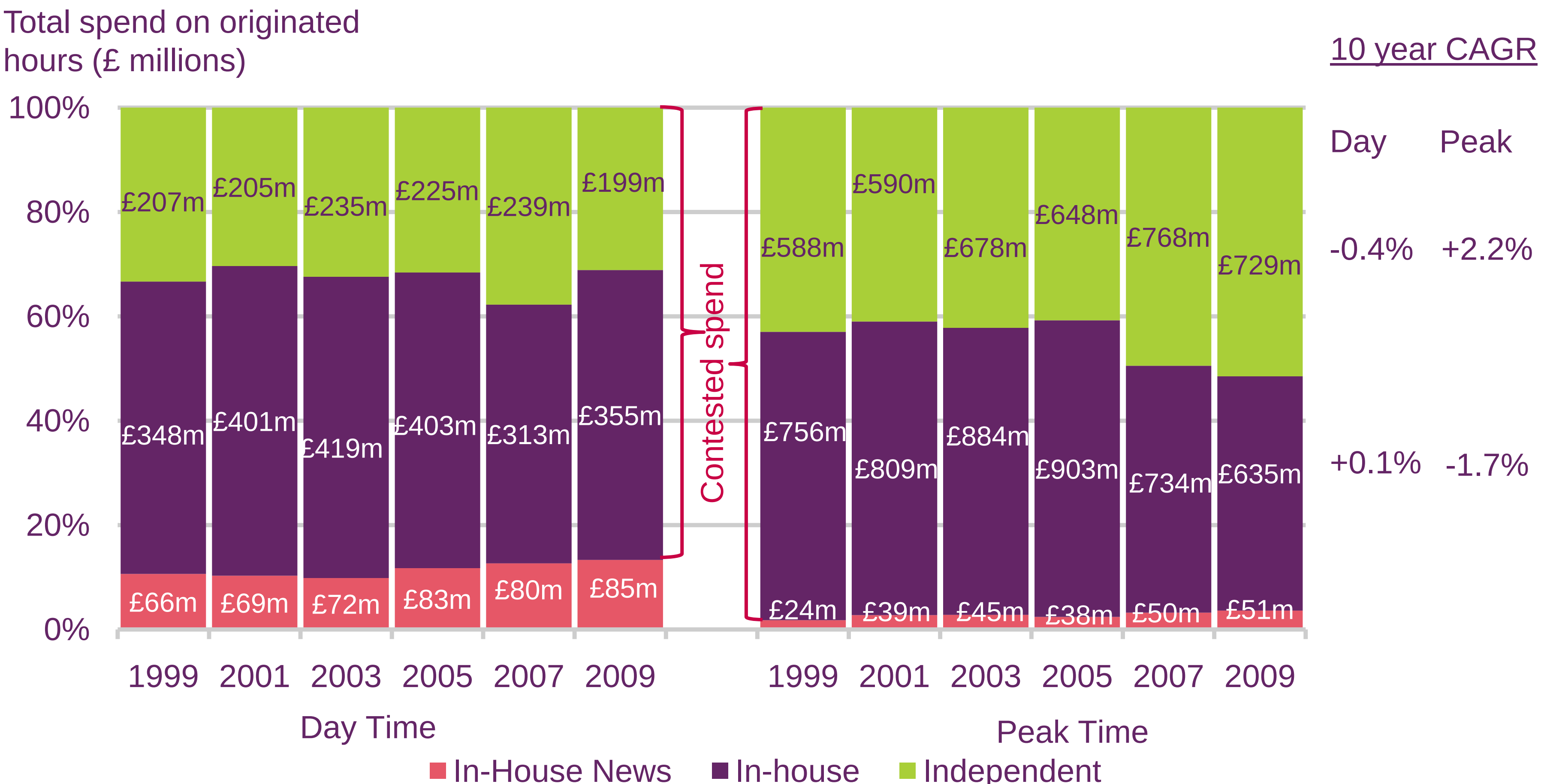
PSB originations volume, excluding News: daytime and peak time, 1999 – 2009



Source: Ofcom/broadcasters.
Chart Includes five main networks, BBC Three, BBC Four, CBBC and Cbeebies only. News is excluded in order to show contested hours only.

Figure 2.53

PSB originations – daytime and peak time, 1999 - 2009

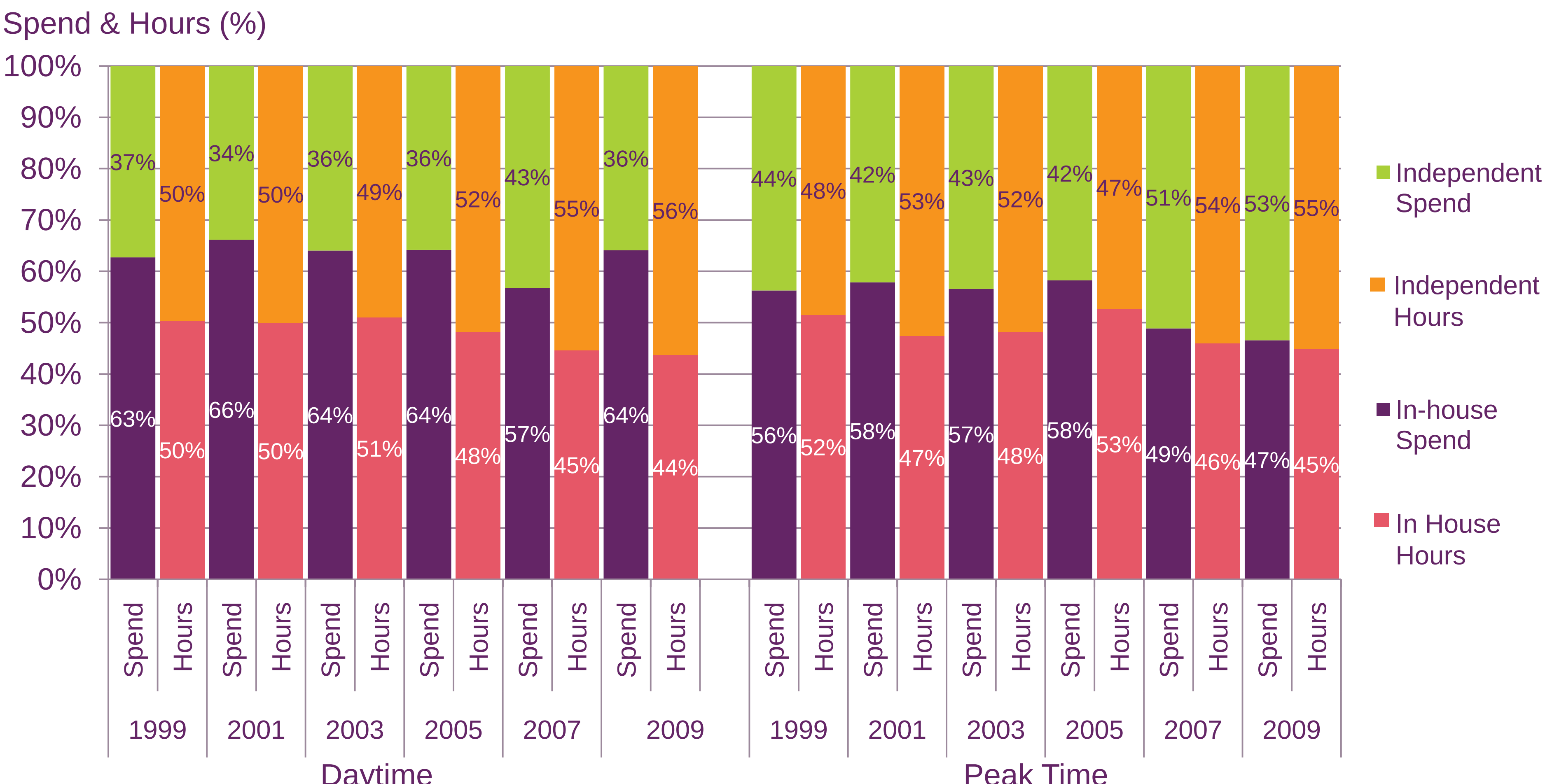


Source: Ofcom/broadcasters.

Note: Chart includes five main networks and BBC Three, BBC Four, CBBC and CBeebies only. News is shown separately as its hours are not included when calculating the independent quota. Figures expressed in 2009 prices.

Figure 2.54

PSB Originations spend and hours - daytime and peaktime 1999 - 2009



Source: Ofcom/broadcasters.

Chart Includes five main networks and BBC Three, BBC Four, CBBC and Cbeebies only. News is excluded in order to show contested hours only. Figures expressed in 2009 prices.

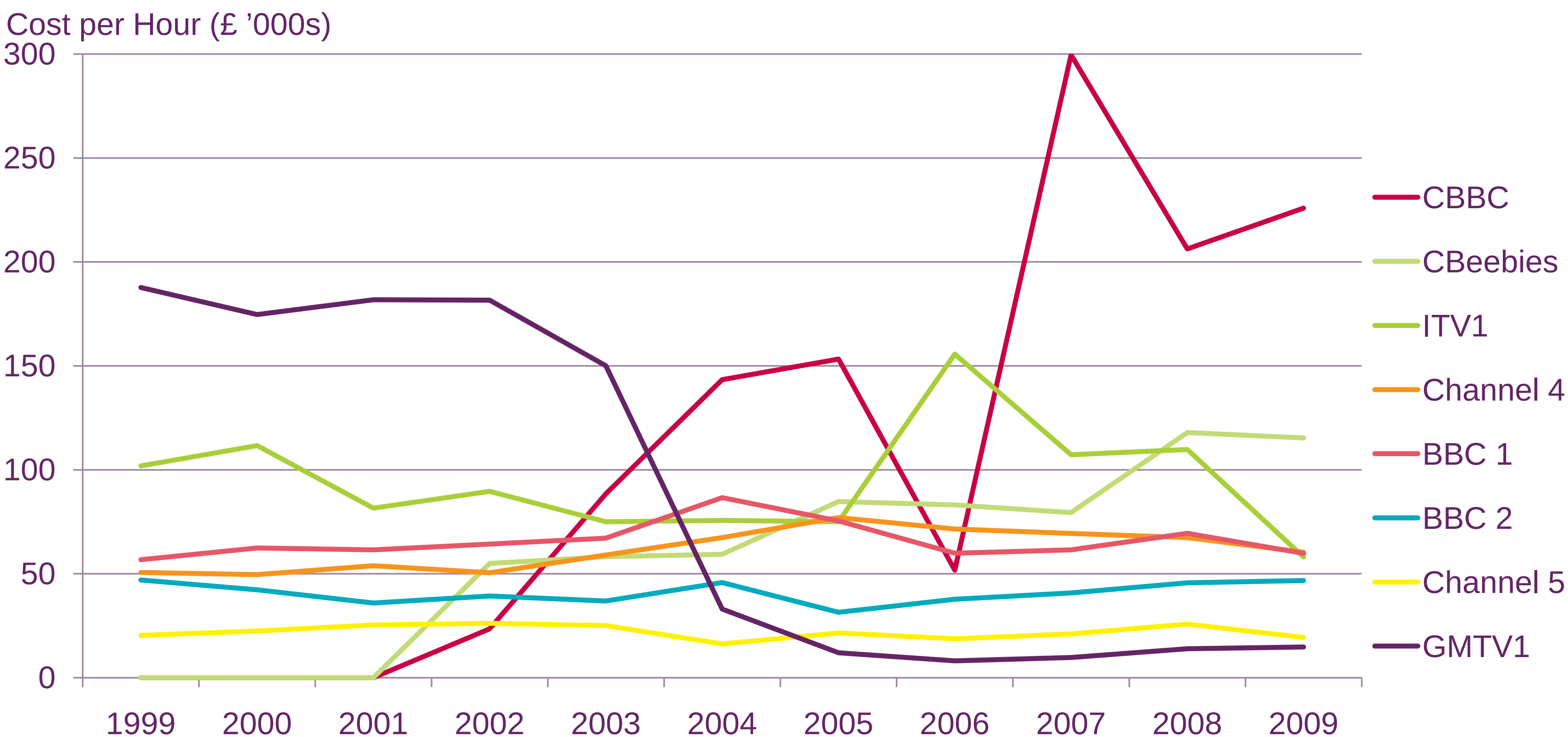
Figure 2.55

PSB cost per hour for first run origination content – daytime and peak time, ten - year comparison

Source: Ofcom/broadcasters.
Note: Chart Includes five main networks and BBC Three, BBC Four, CBBC and CBeebies only. Figures exclude News. Figures expressed in 2009 prices.

Figure 2.56

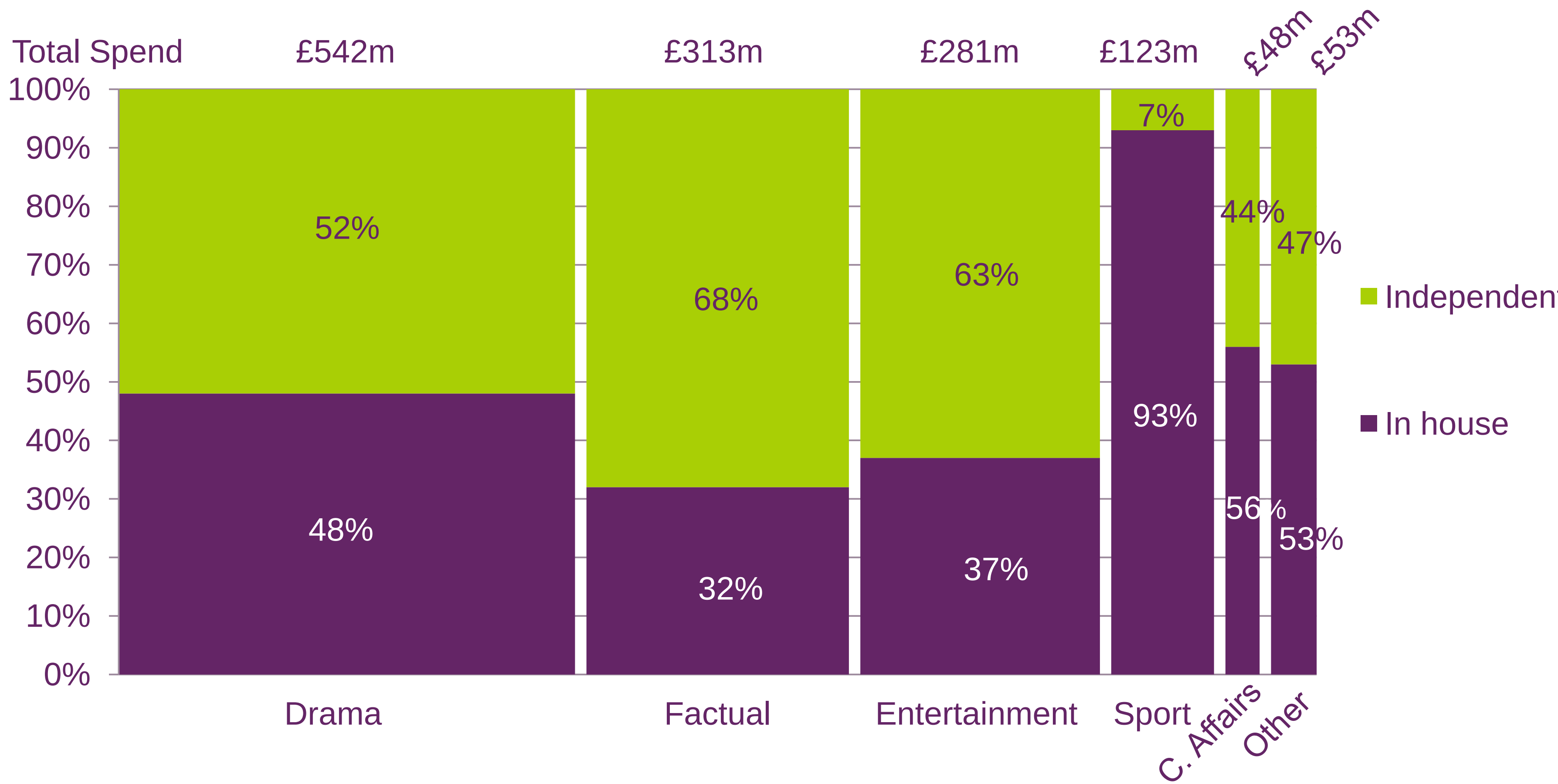
PSB cost per hour for first-run origination content - daytime independent commissions by channel, ten-year comparison



Source: Ofcom/broadcasters.
Chart Includes five main networks, GMTV, CBBC and CBeebies only. Figures exclude News. Figures expressed in 2009 price.

Figure 2.57

PSB originations spend by genre – peak time, 2009



Source: Ofcom/broadcasters.
Chart Includes five main networks and BBC Three, BBC Four, CBBC and Cbeebies only.

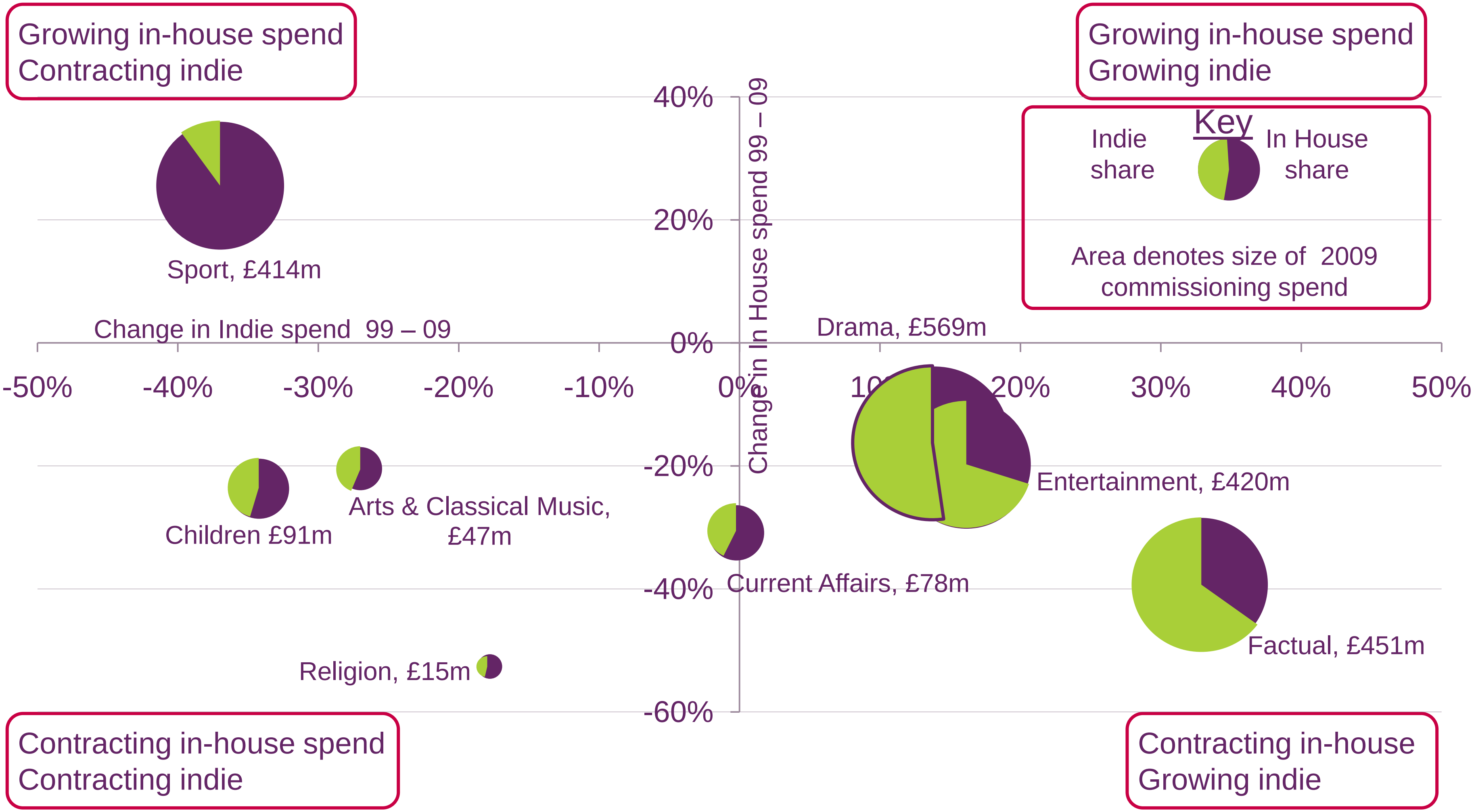
Figure 2.58

2009 distribution of PSB peak time spend and change over 10 year period 1999 – 2009 by genre

Source: Ofcom/Broadcasters.

Figure 2.59

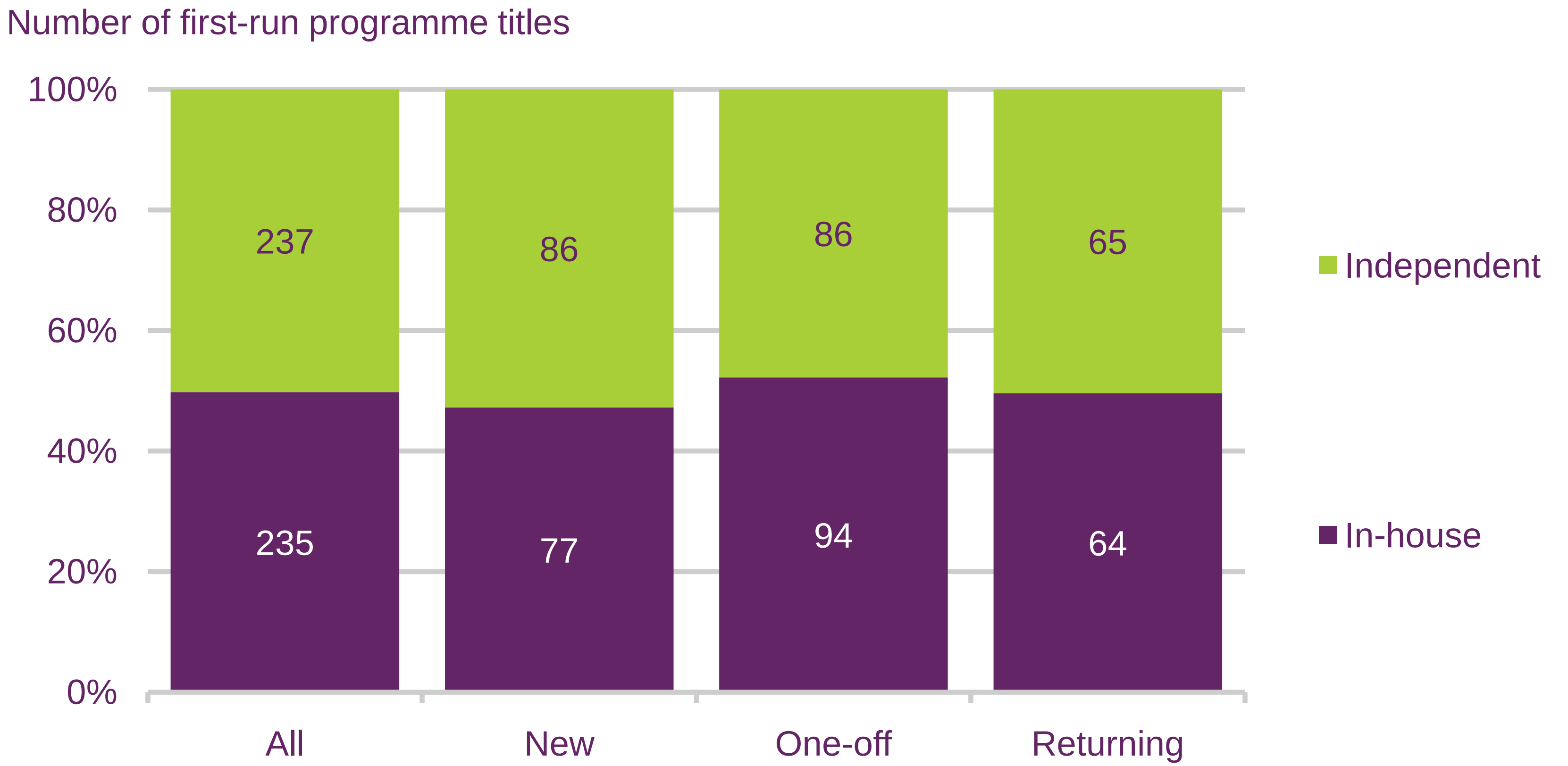
2009 distribution of PSB all-day originations' spend and change over 10-year period, by genre: 1999 – 2009



Source: Ofcom/broadcasters.

Figure 2.60

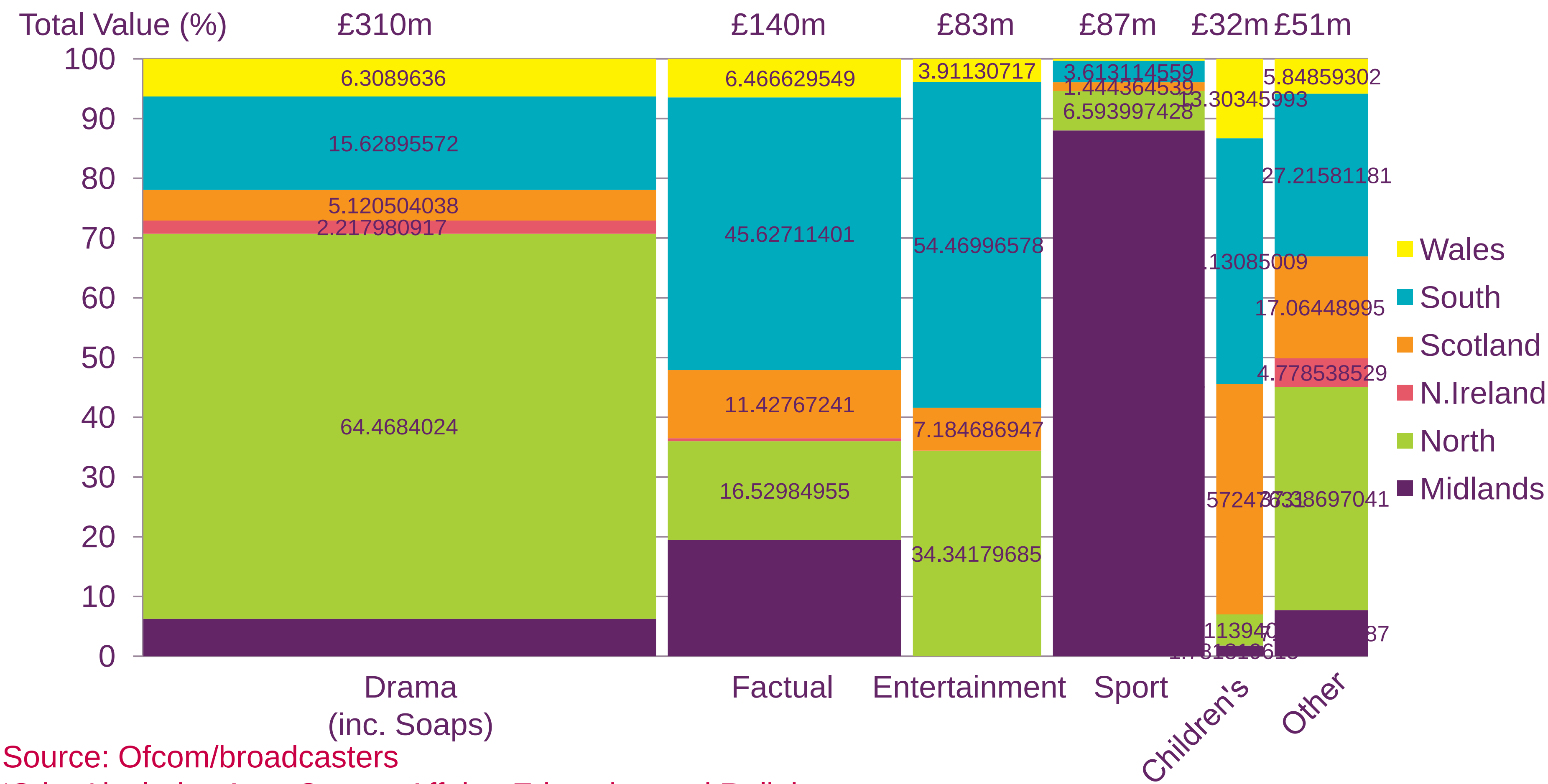
BBC One and Two and ITV1 new, one-off and returning series, peak time: 2009



Source: Broadcasters
'New series' includes brand-new series and mini-series. 'One-off' includes one-off programmes and one-offs within series such as Panorama and Dispatches programmes. Programmes which form part of the core schedule, such as Eastenders, Coronation Street, News have been excluded. Sports programmes and feature films have also been excluded.

Figure 2.61

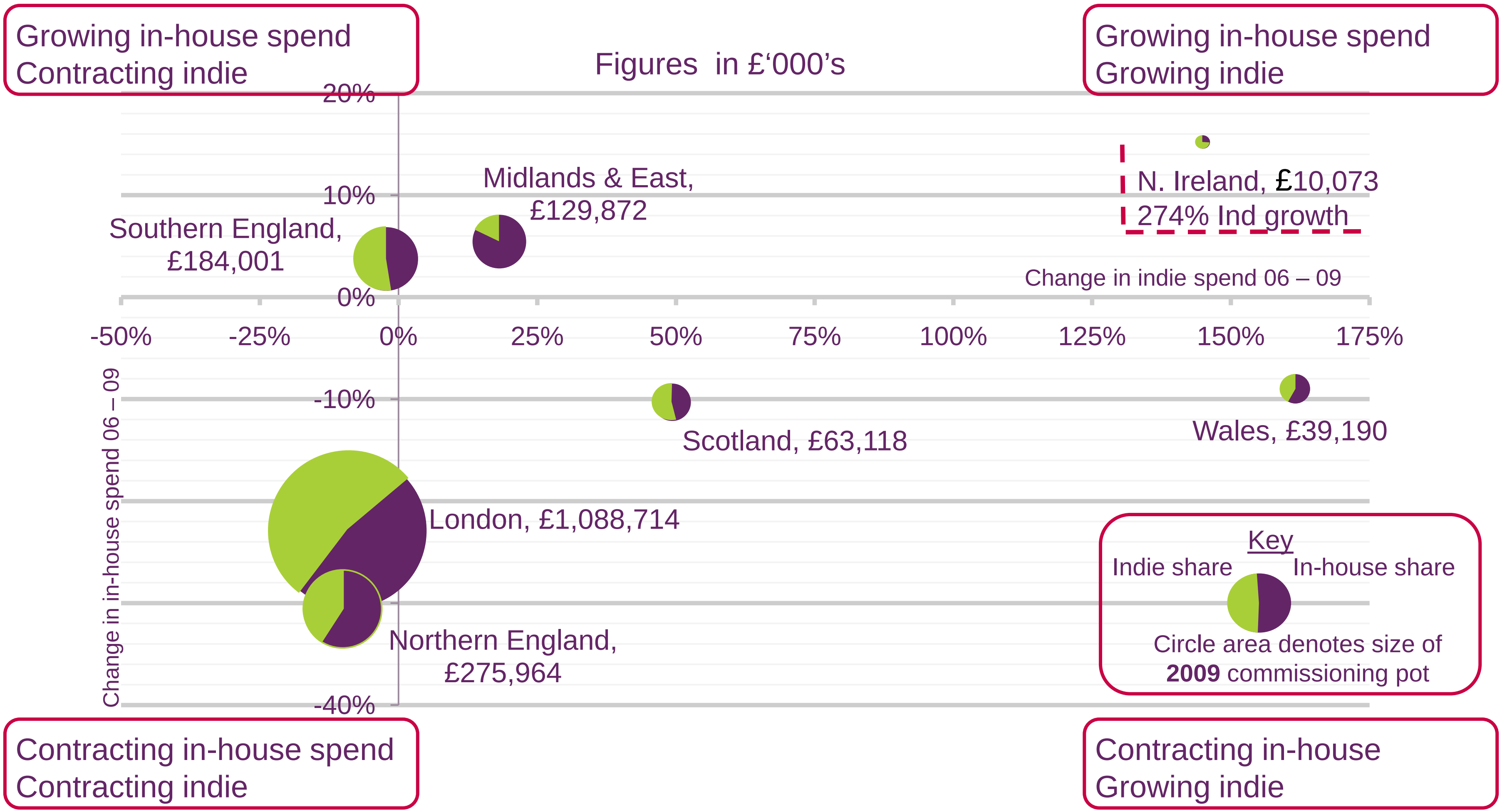
In-house and independent PSB production spend outside London by genre, 2009



Source: Ofcom/broadcasters
'Other' includes Arts, Current Affairs, Education and Religion

Figure 2.62

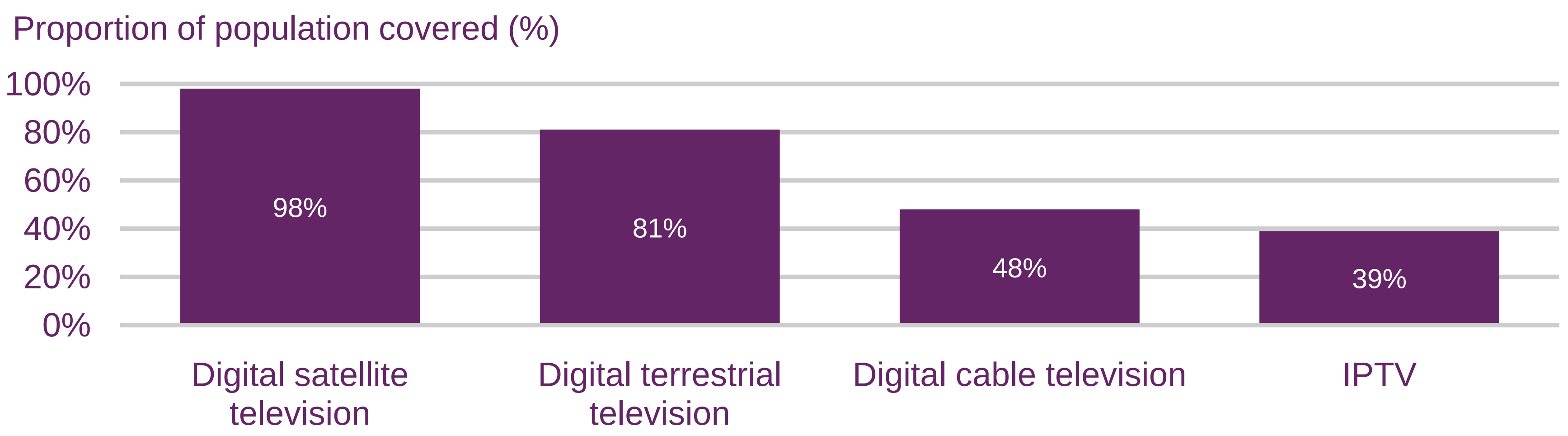
2009 distribution of PSB production spend, by region, and change in spend: 2006 - 2009



Source: Ofcom/broadcasters.

Figure 2.63

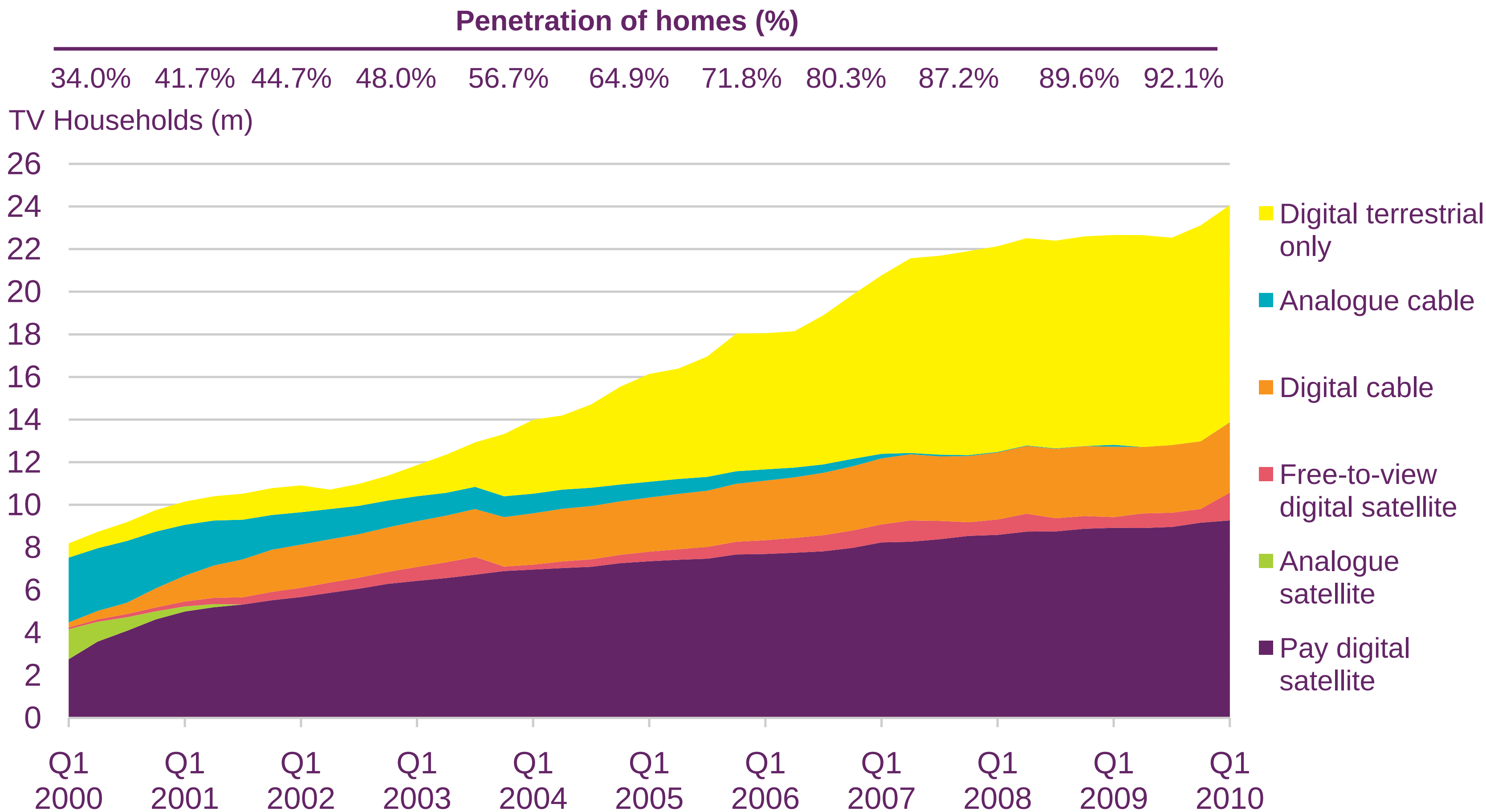
Availability of digital television platforms



Source: Ofcom research/operators. Note that the DTT coverage figures represent the availability of a service of 17 television channels. DTT coverage levels represent Ofcom estimates. Data correct as of June 2010.

Figure 2.64

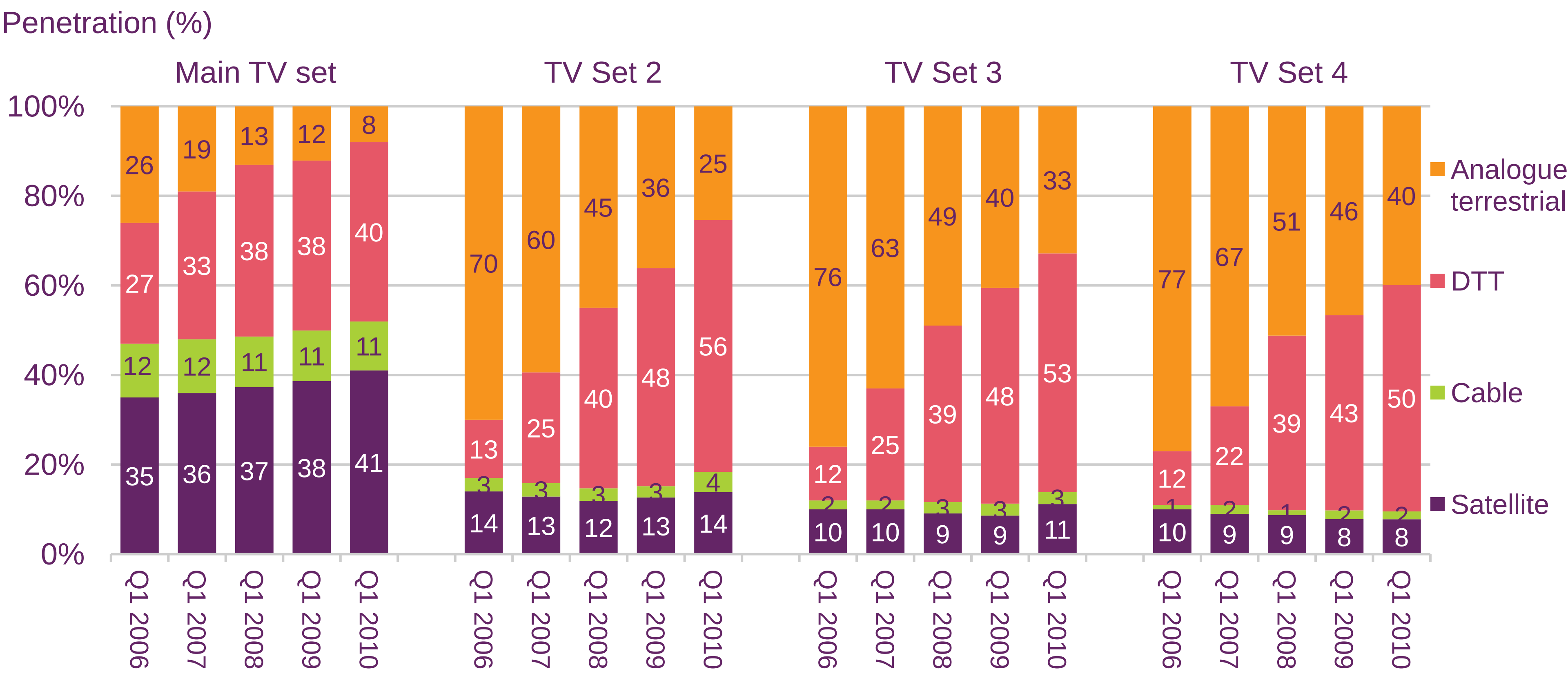
Take-up of multichannel TV on main sets



Source: Ofcom, GfK, Sky, Virgin Media. Data from Q1 2007 is based on consumer research, previous quarters use platform operator data, research and Ofcom estimates. Note: Digital terrestrial relates to DTT-only homes.

Figure 2.65

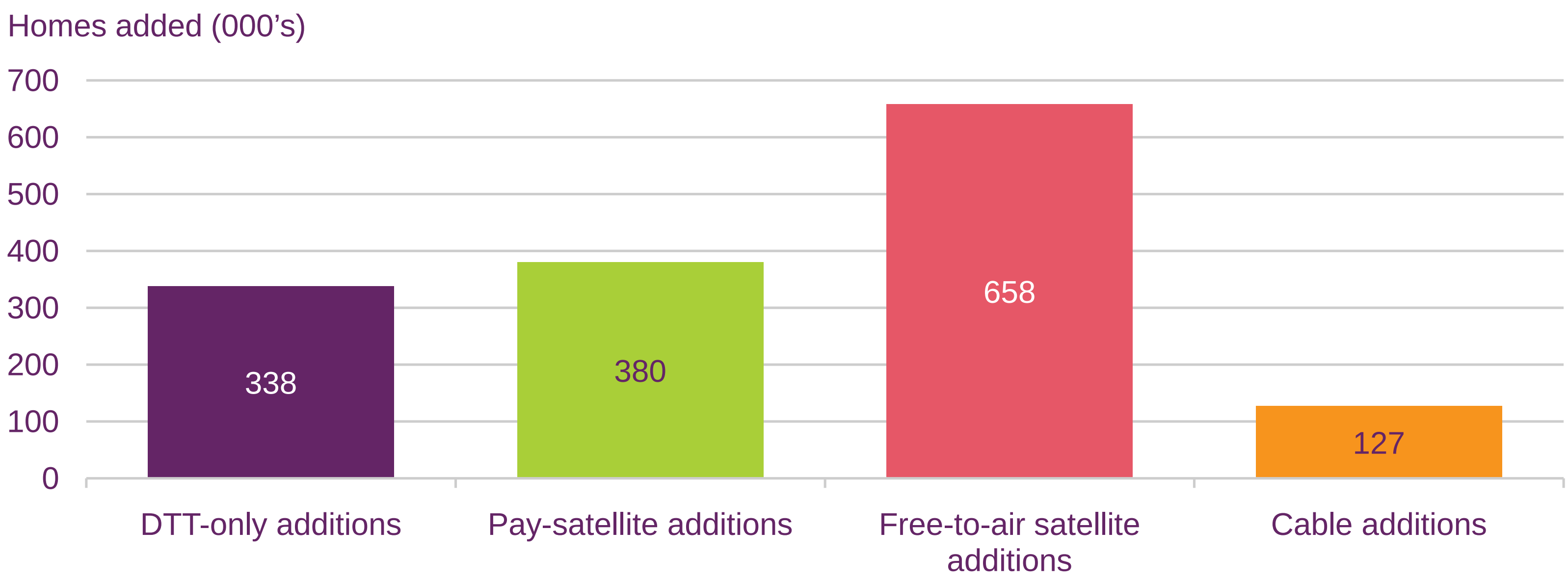
Platform share, by TV set



Source: GfK consumer research

Figure 2.66

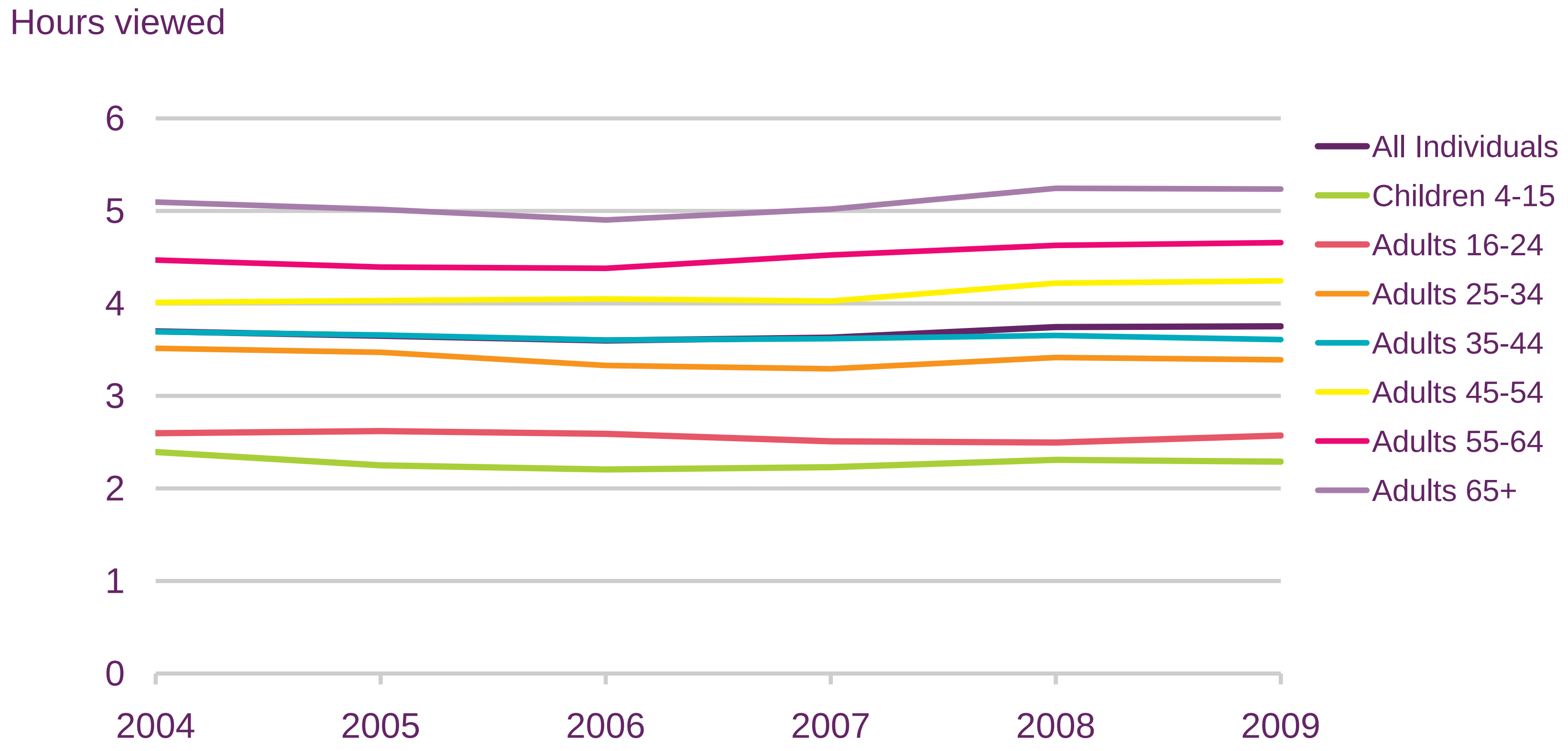
DTT, satellite and cable net additions, year to Q1 2010



Source: Pay platform additions based on Virgin Media reported results and Ofcom estimates based on BSkyB results. Free satellite additions based on BBC/ITV Freesat sales figures. DTT additions based on Q1 2010 and Q4 2009 consumer survey results. Note: Chart uses multiple sources and is therefore intended to be considered only as a general indication of performance.

Figure 2.67

Average hours of television viewing per day, by age, all homes

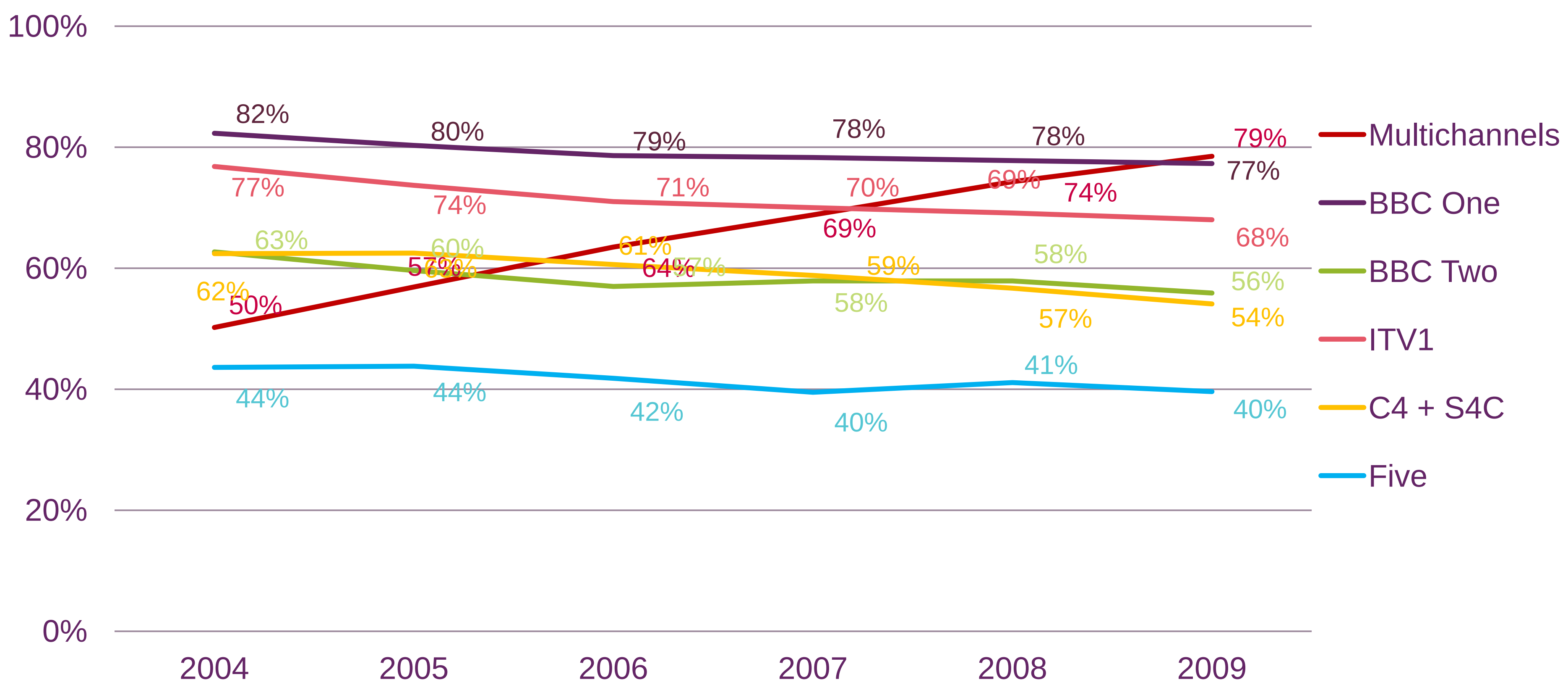


Source: BARB

Figure 2.68

Average weekly TV reach in all homes, by channel

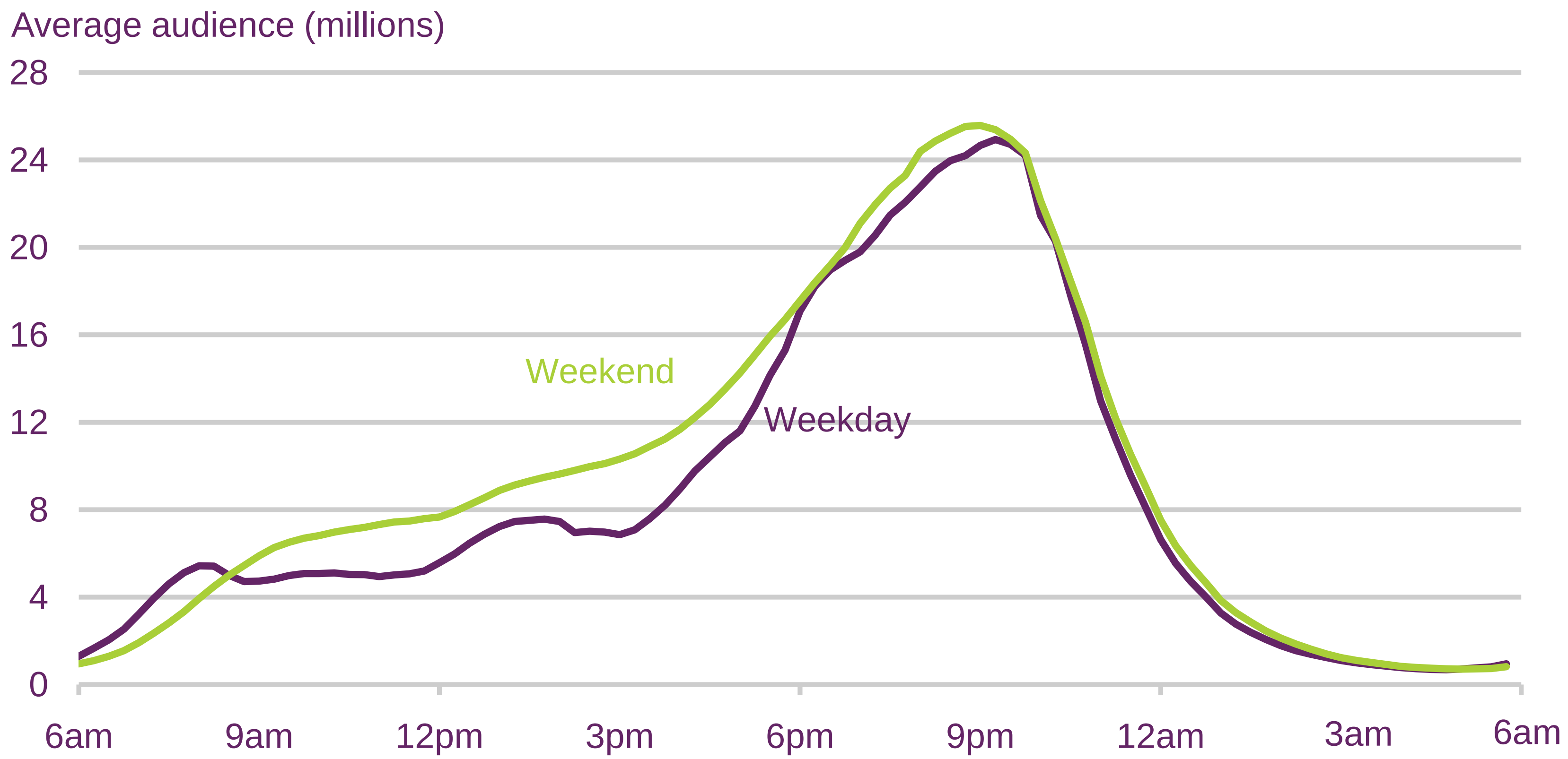
15-minute consecutive weekly reach – full weeks (%)



Source: BARB. Full weeks used.

Figure 2.69

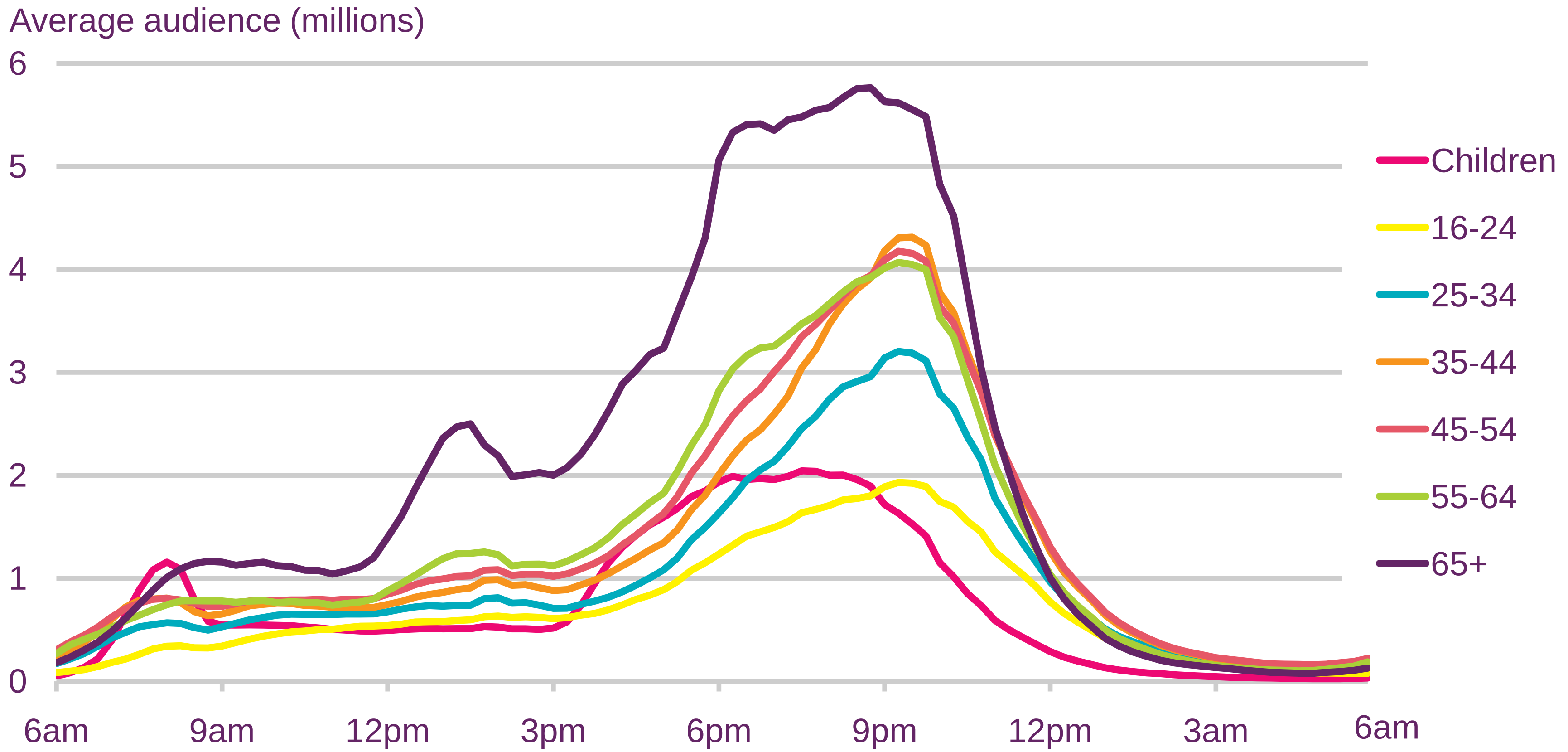
Average 2009 audiences, weekdays/weekends: by day part, all homes



Source: BARB

Figure 2.70

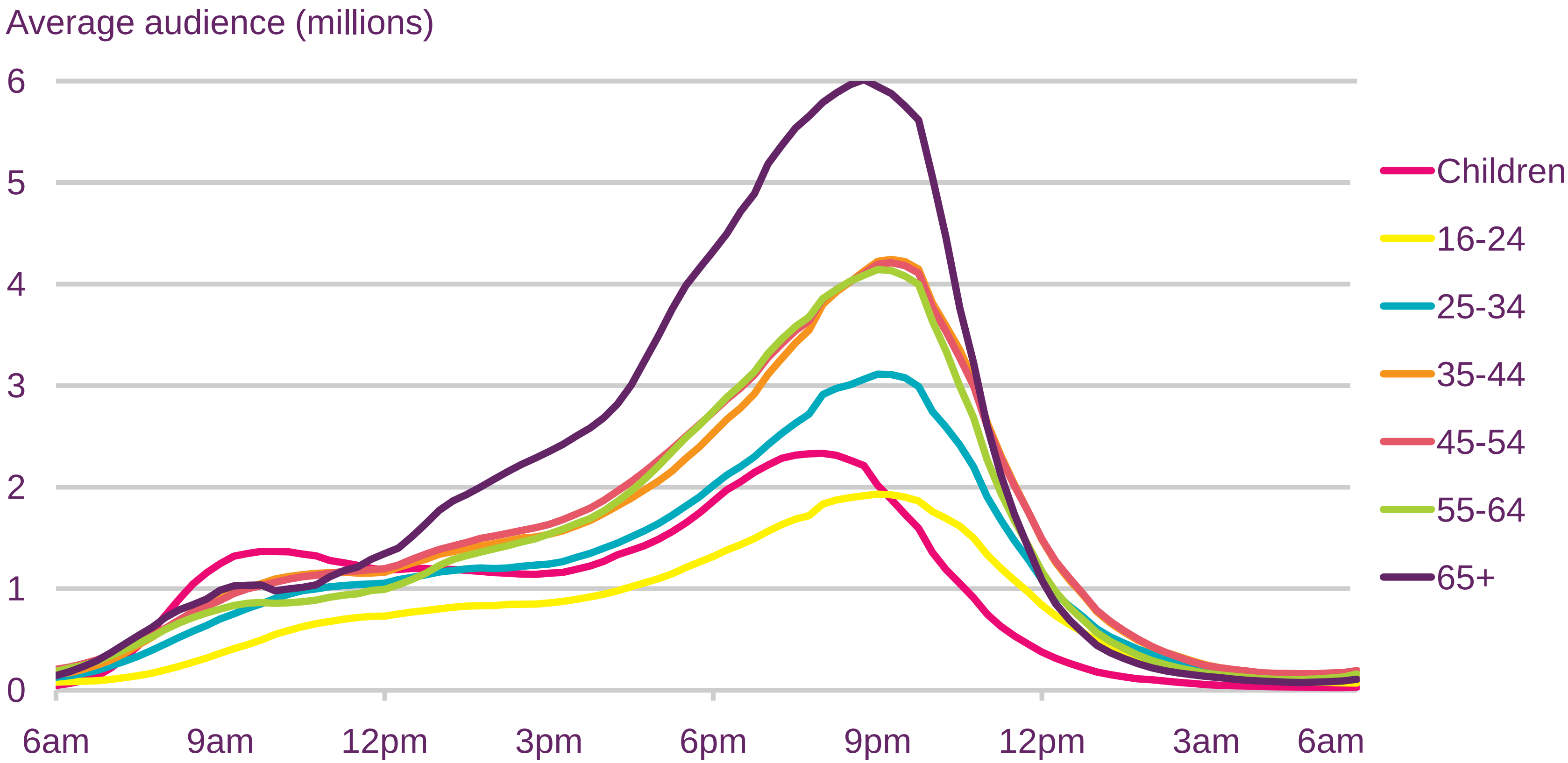
Average 2009 weekday audiences, by day part and age, all homes



Source: BARB

Figure 2.71

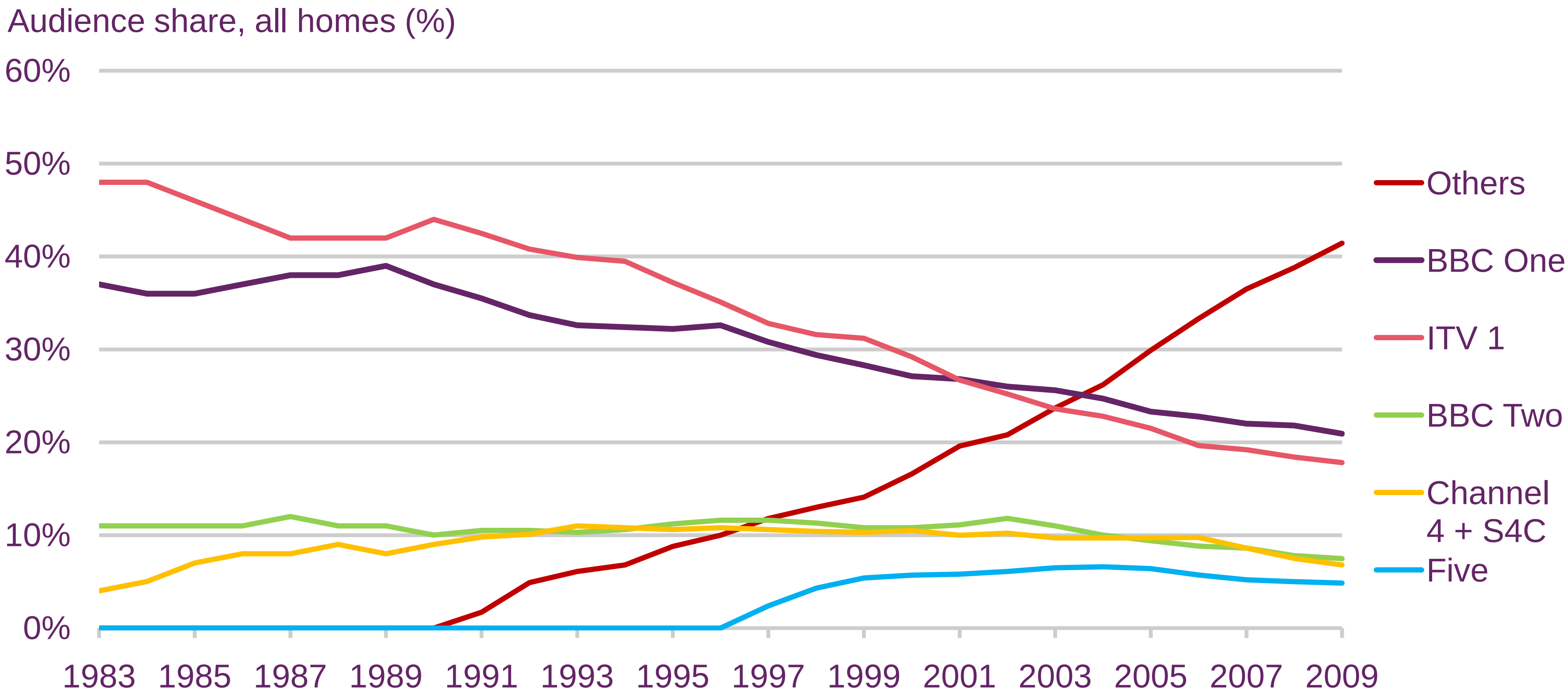
Average 2009 weekend audiences, by day part and age, all homes



Source: BARB

Figure 2.72

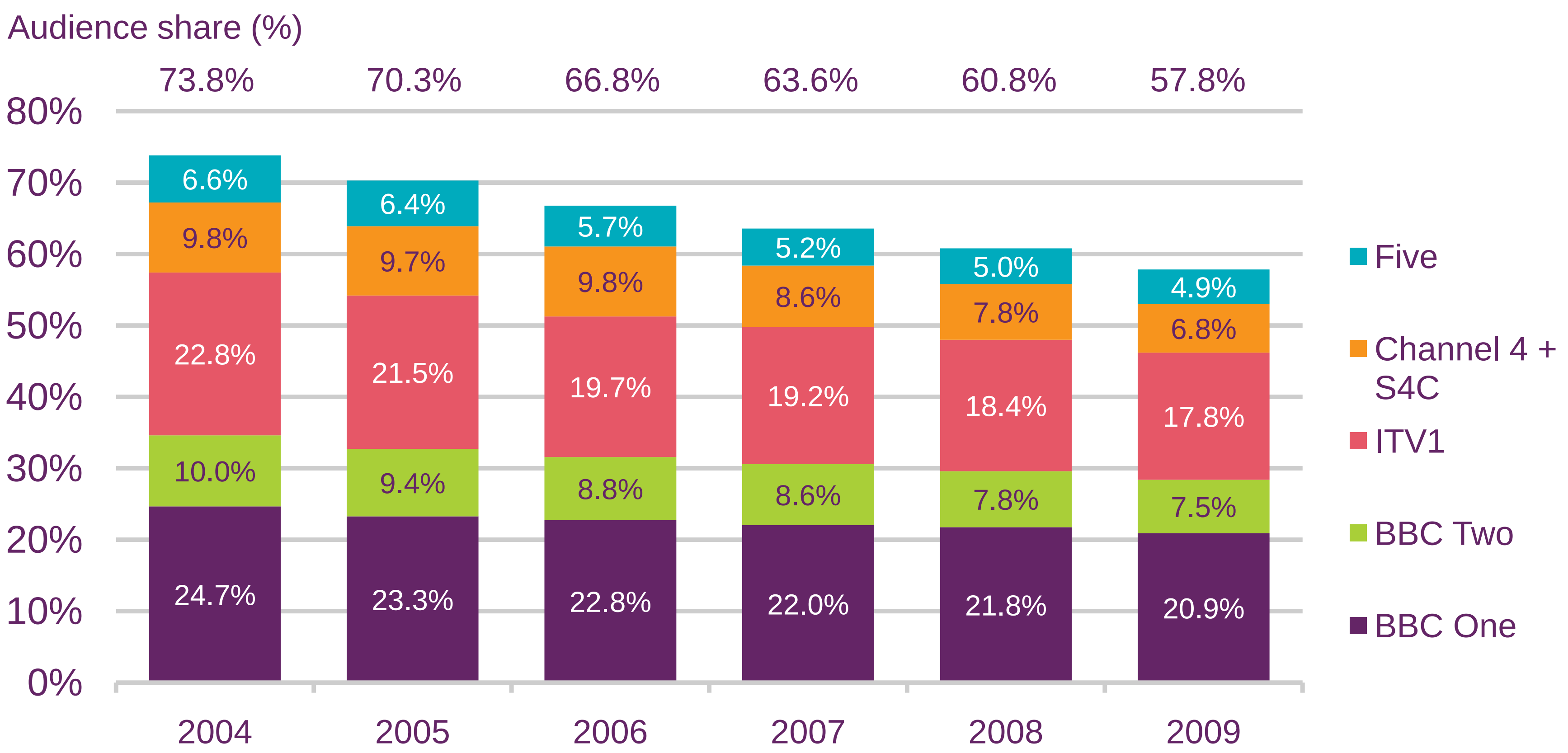
Channel shares in all homes, 1982 to 2009



Source: BARB, TAM JICTAR and Ofcom estimates

Figure 2.73

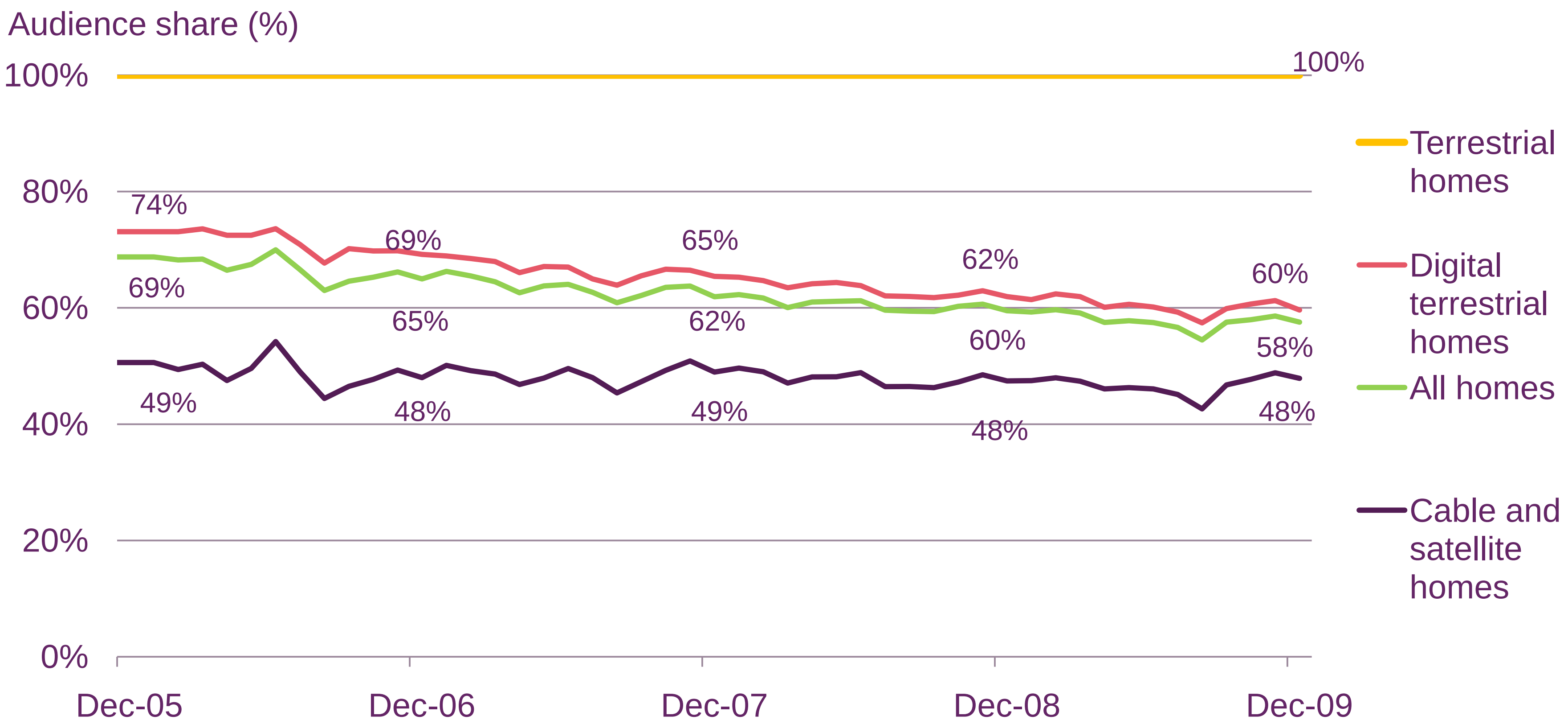
Five main PSB channels' audience share, all homes



Source: BARB

Figure 2.74

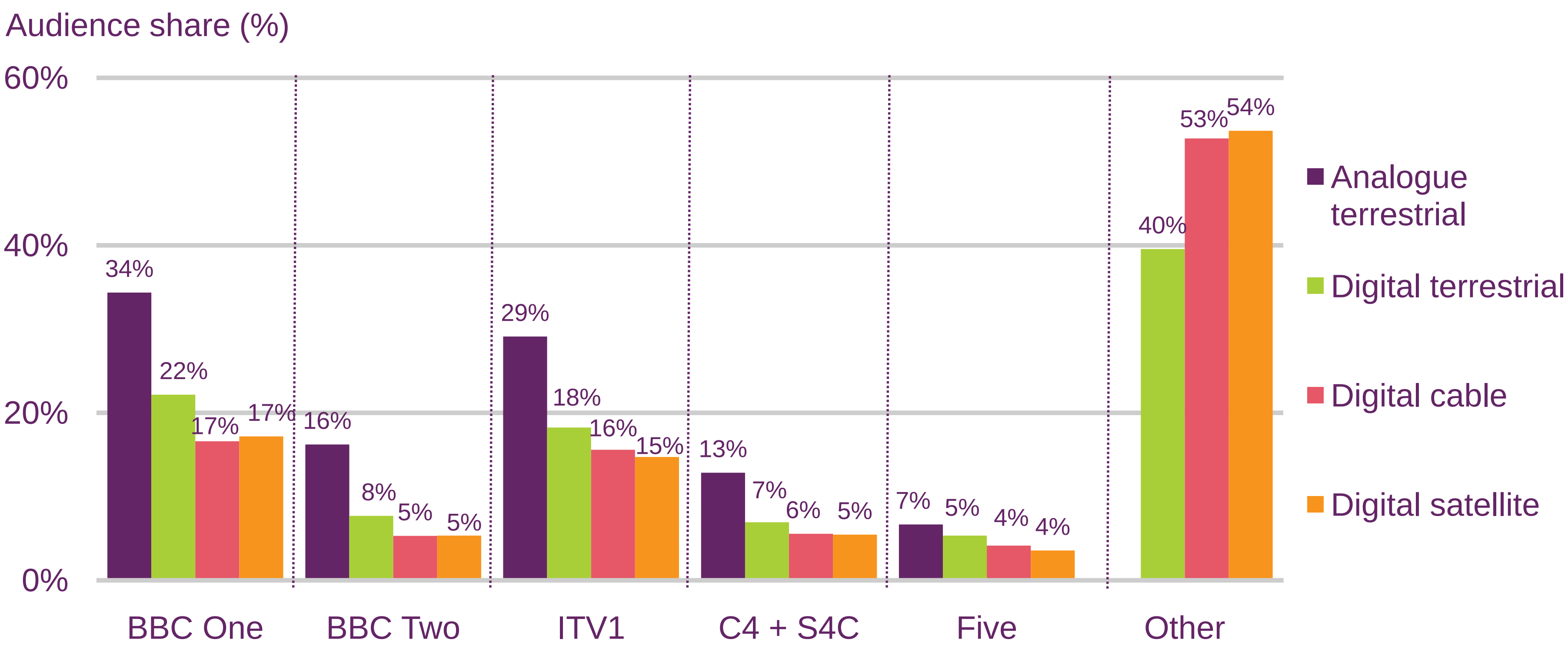
Five main PSB channels’ audience shares, by platform



Source: BARB, all day, all viewers, various platforms

Figure 2.75

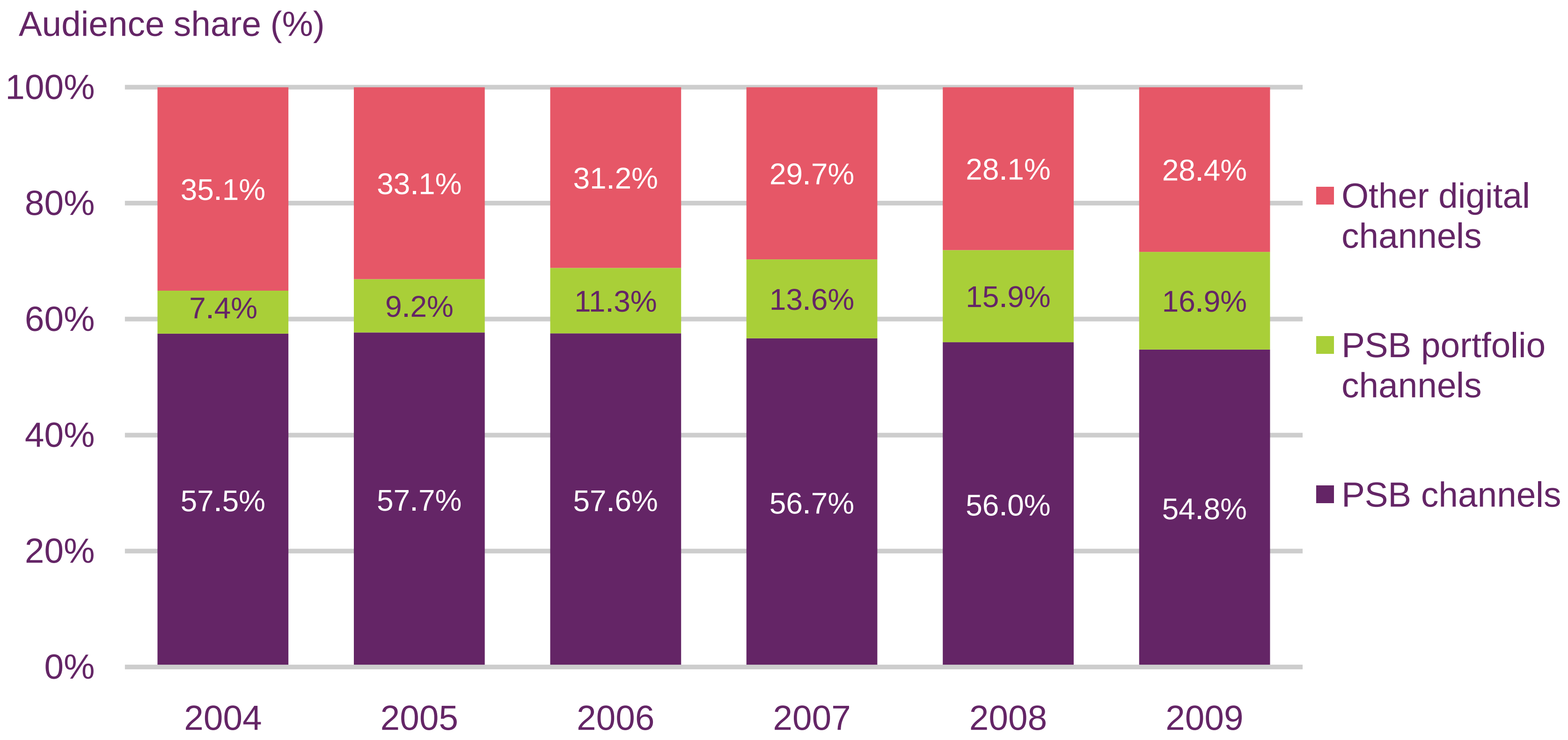
Channel share, by platform, 2009



Source: BARB

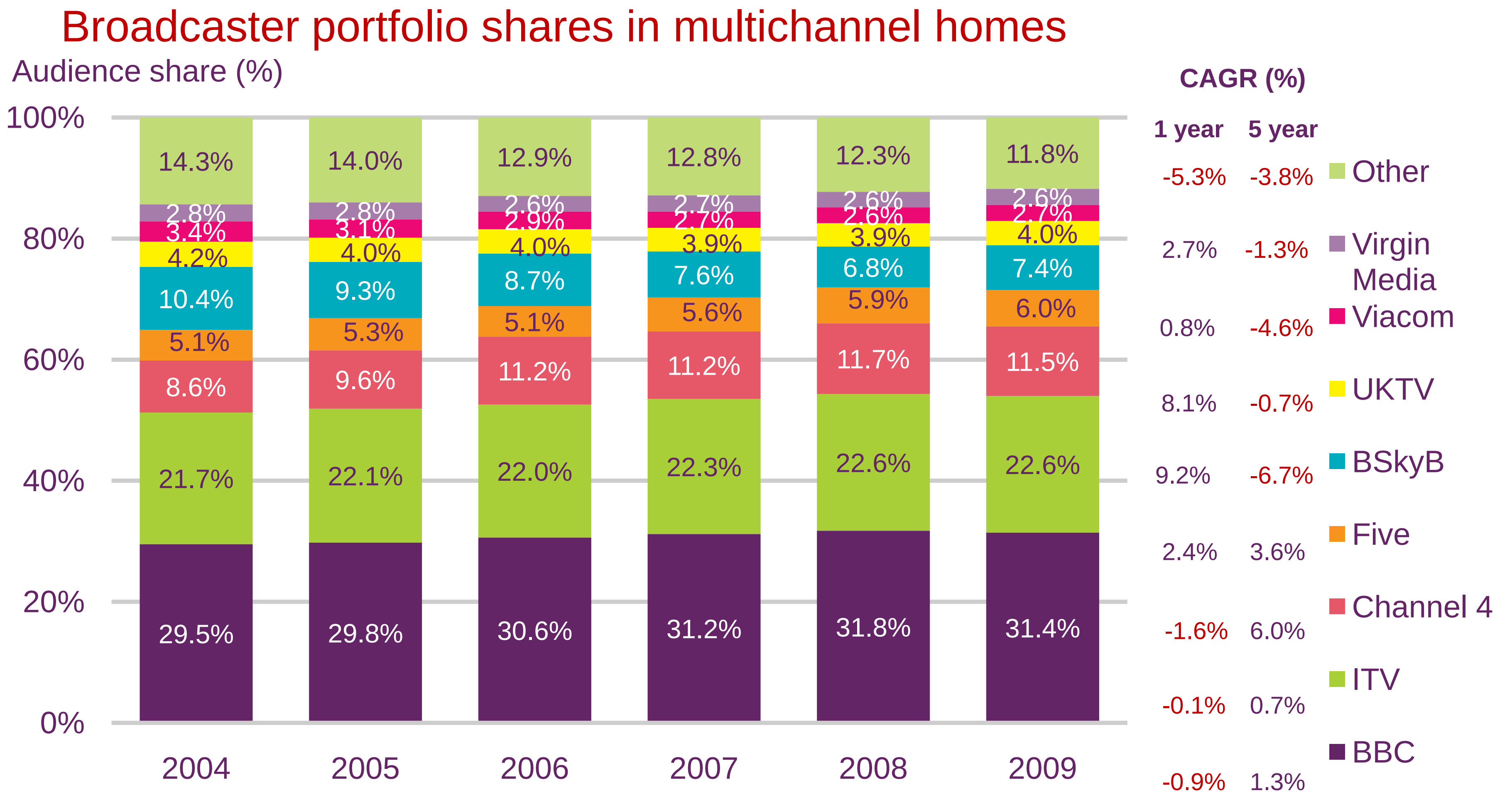
Figure 2.76

PSB and portfolio channel shares in multichannel homes



Source: BARB

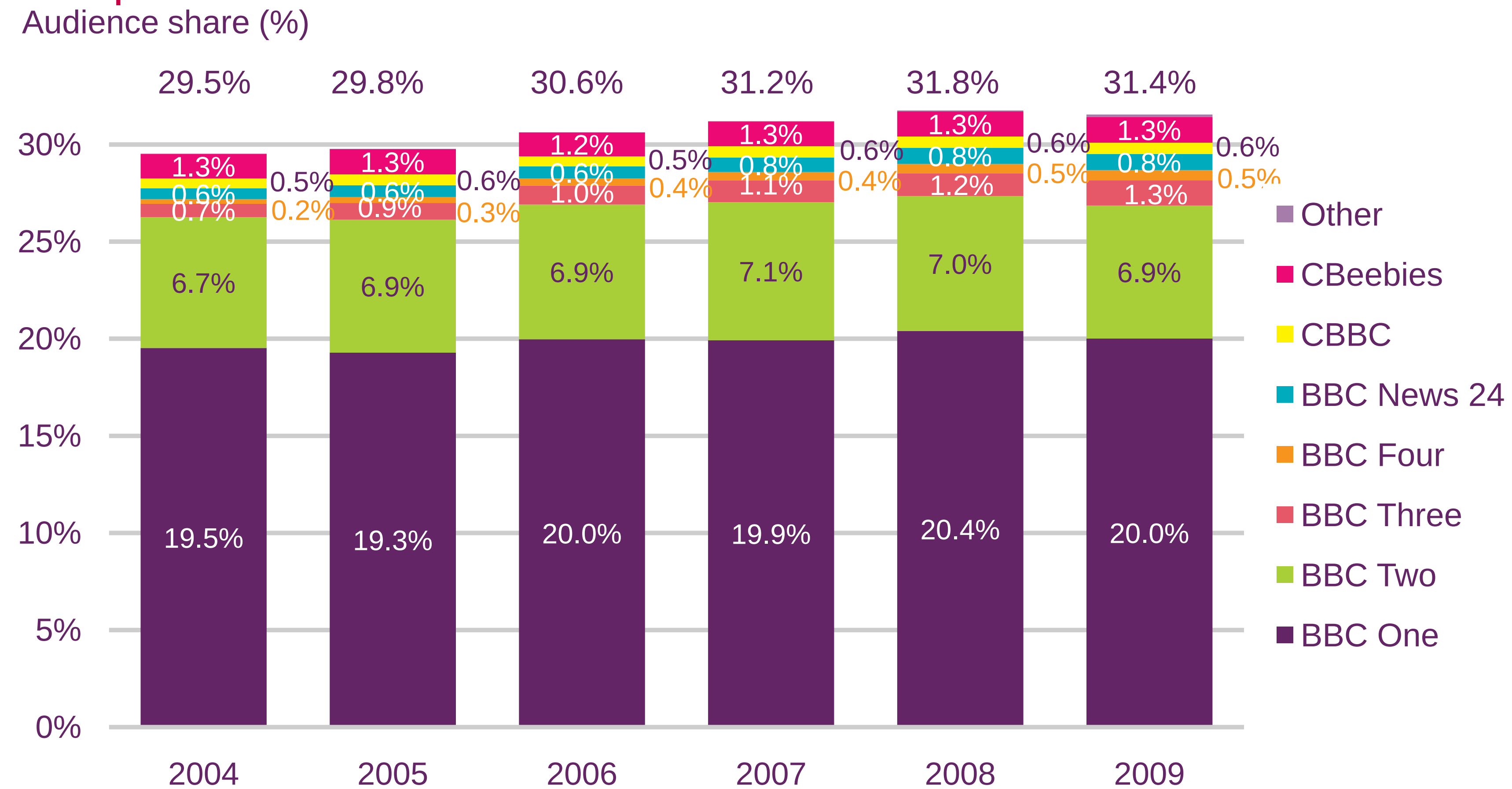
Figure 2.77



Source: BARB

Figure 2.78

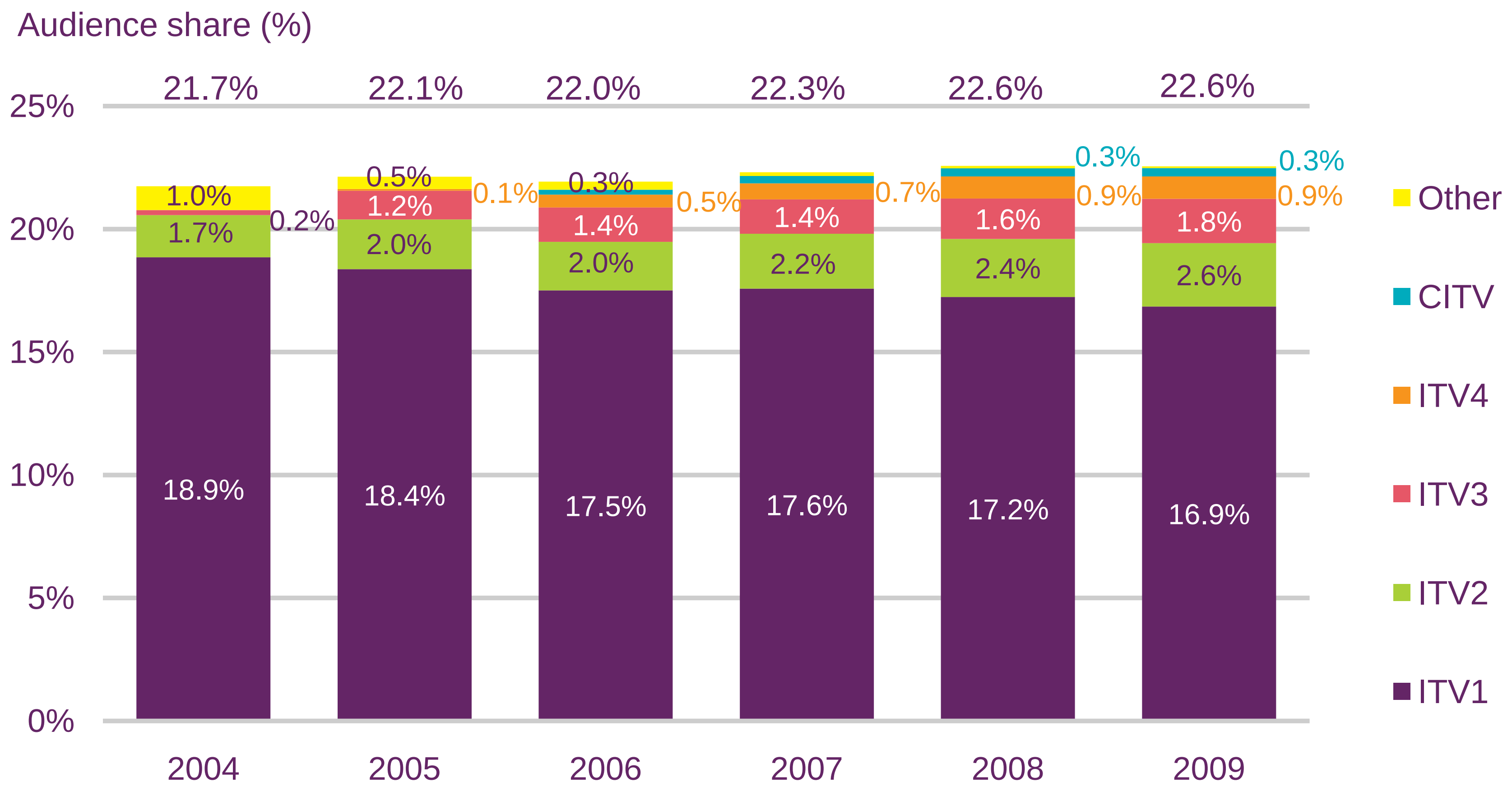
BBC portfolio share in multichannel homes



Source: BARB Note: 'Other' includes BBC Parliament, BBC Choice, BBC HD and BBC Knowledge

Figure 2.79

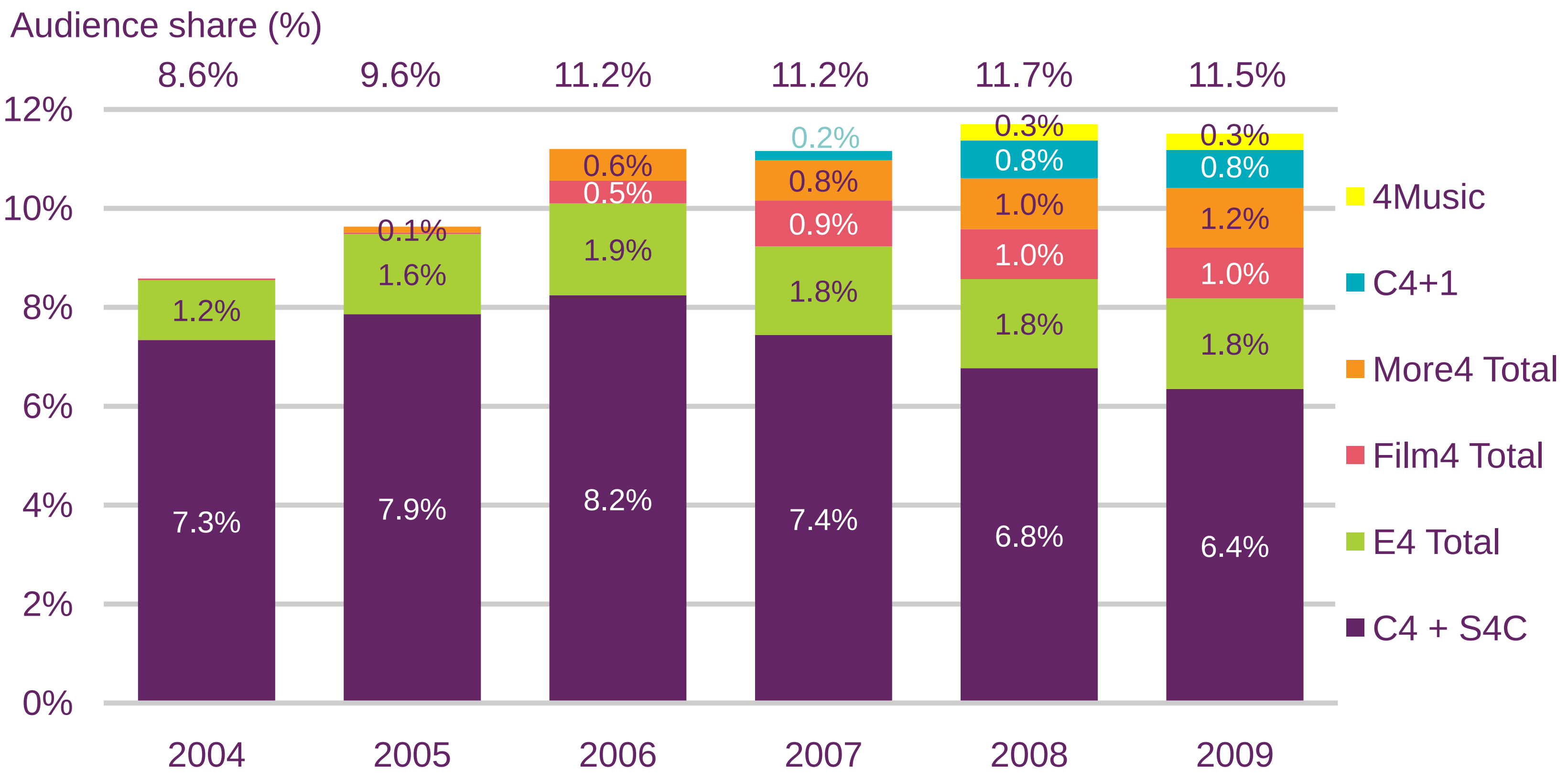
ITV portfolio shares in multichannel homes



Source: BARB Note: Other includes ITV Play, Men & Motors, GMTV2, Granada Breeze, Plus, ITV News
ITV2, ITV3 and ITV4 include their +1 service share

Figure 2.80

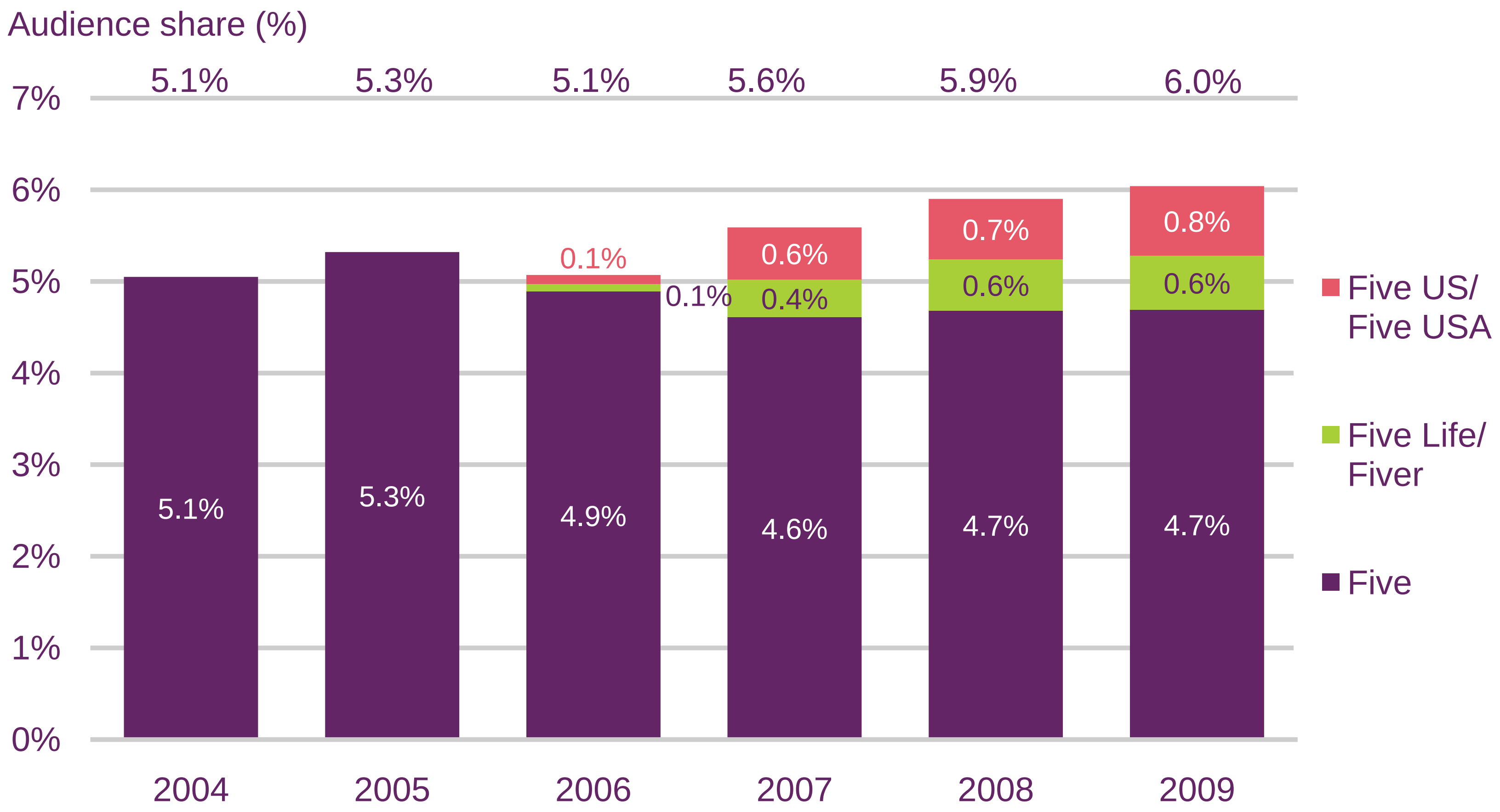
Channel 4 portfolio shares in multichannel homes



Source: BARB

Figure 2.81

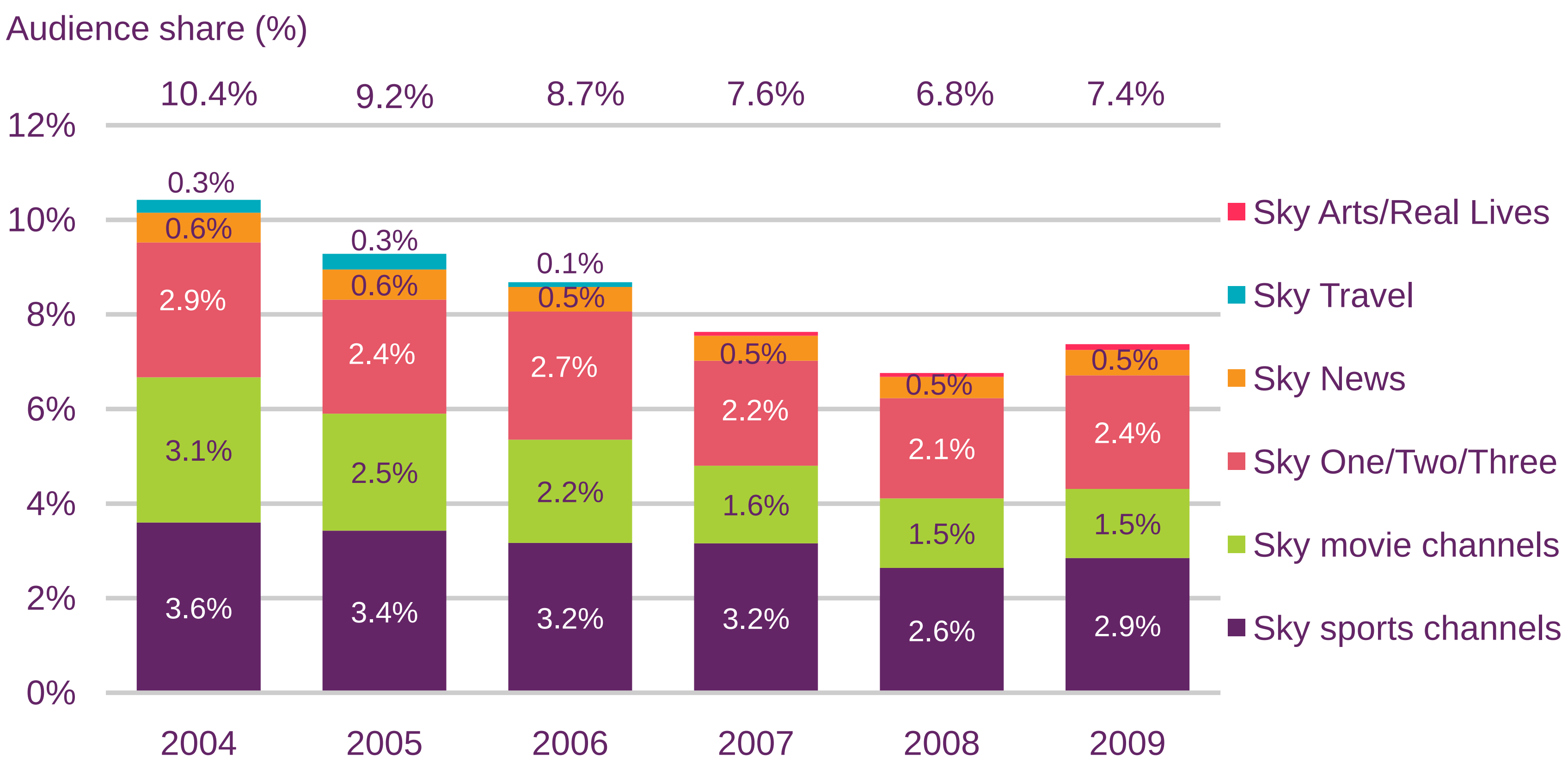
Five portfolio shares in multichannel homes



Source: BARB
Note: Five Life and Five US include their +1 service share

Figure 2.82

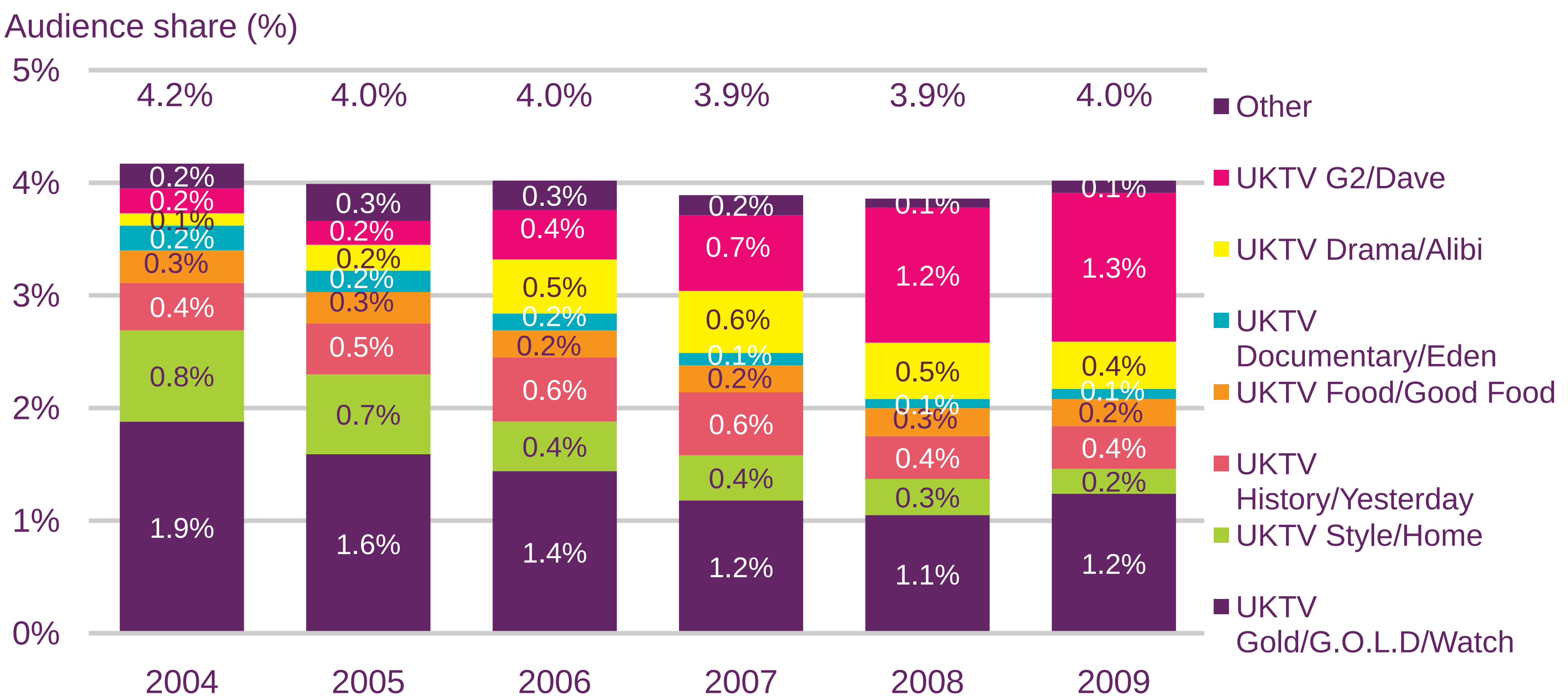
BSkyB portfolio shares in multichannel homes



Source: BARB

Figure 2.83

UKTV portfolio shares in multichannel homes

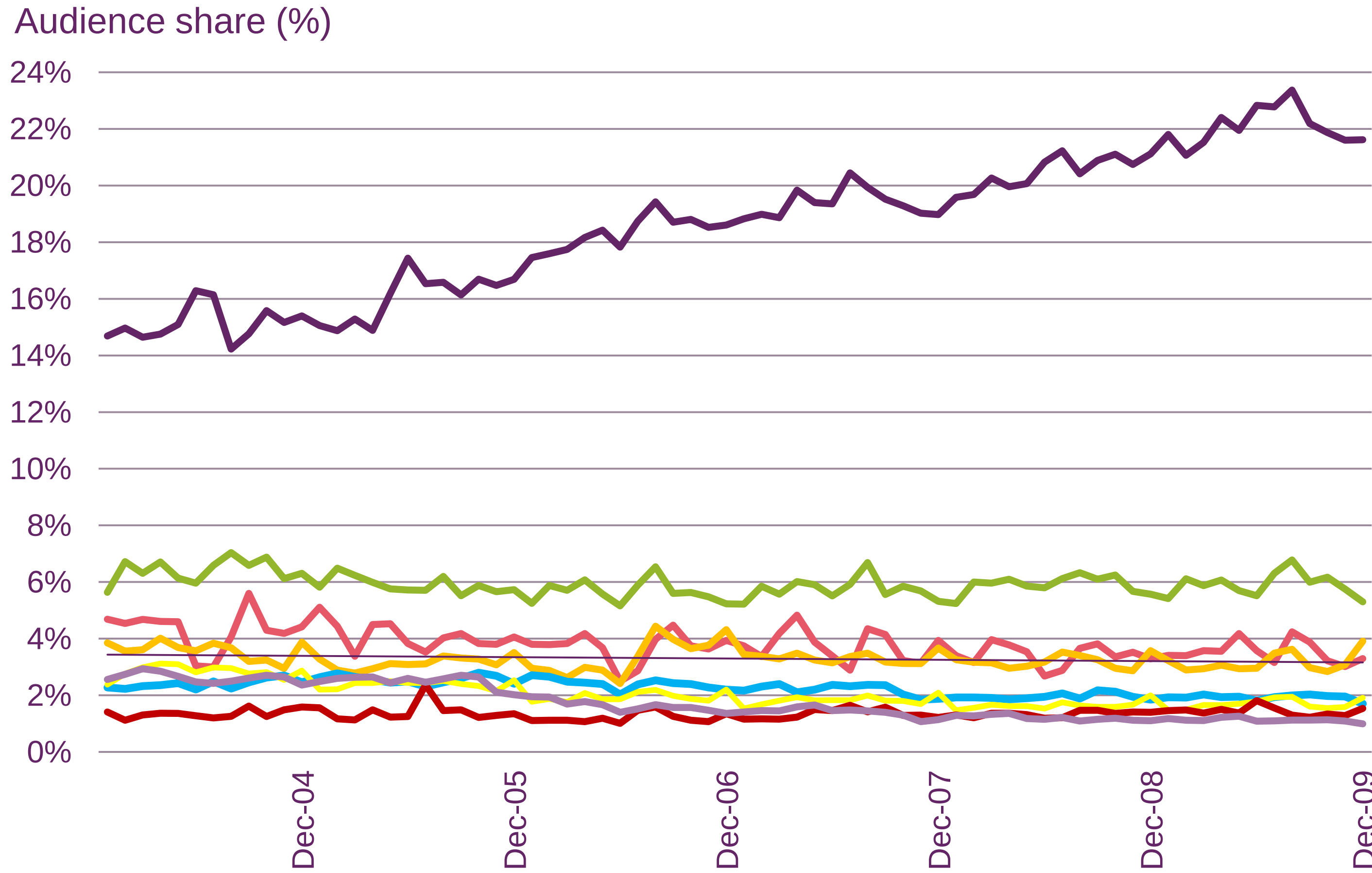


Source: BARB

Note: UKTV portfolio channels have evolved over the past twelve months. In the 2008 figures, new channel names and shares have been matched to old channels. Trends should be interpreted with caution

Figure 2.84

Aggregate shares of channel genres in multichannel homes



No. of channels

	2004	2009
Entertainment	24	52
Childrens	13	24
Sport	12	23
Movies	14	28
Documentaries	10	20
Music	17	28
News	12	17
Lifestyle and Culture	10	25

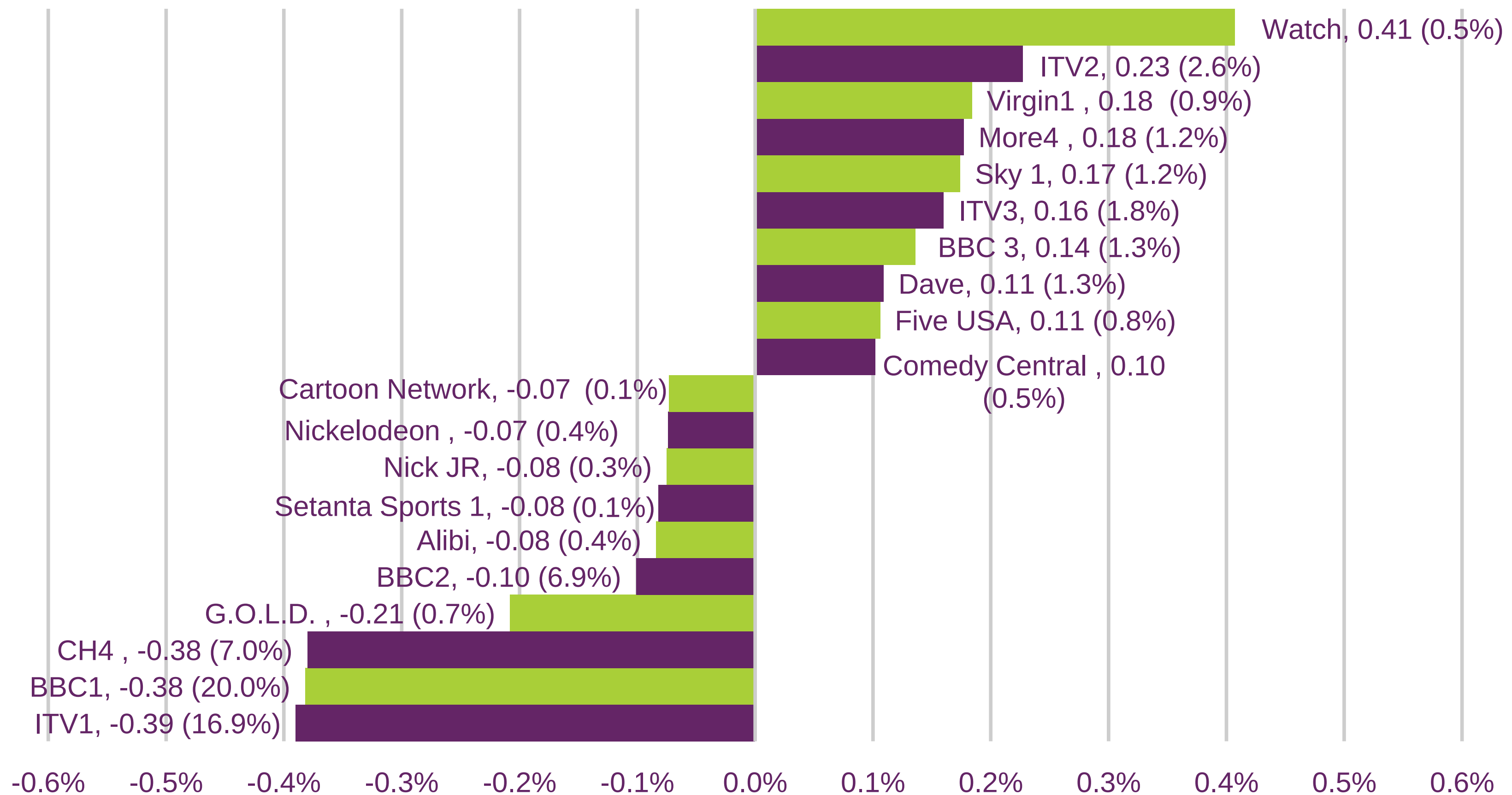
Source: BARB

+1 services are not included in the number of channels.

Figure 2.85

Multichannel audience winners and losers, 2008 to 2009

Percentage point change in audience share (2009 average audience share %)



Source: BARB
Note: Includes channel’s +1 services

Figure 2.86

The top channels by share in multichannel homes, 2008 to 2009

Channel	Share 2009	Rank 2009	Rank 2008	Channel	Share 2009	Rank 2009	Rank 2008
BBC One	20.0%	1	1	Dave	1.3%	11	11
ITV1	16.9%	2	2	BBC Three	1.3%	12	12
Channel 4	7.0%	3	3	More 4	1.2%	13	13
BBC Two	6.9%	4	4	Sky One	1.2%	14	15
Five	4.7%	5	5	Film4	1.0%	15	14
ITV2	2.6%	6	6	ITV4	0.9%	16	17
E4	1.8%	7	7	Living	0.9%	17	18
ITV3	1.8%	8	8	Virgin1	0.9%	18	22
Sky Sports 1	1.4%	9	9	BBC News	0.8%	19	19
CBeebies	1.3%	10	10	Disney Channel	0.8%	20	20

Source: BARB
Includes channel's +1 services.

Figure 2.87

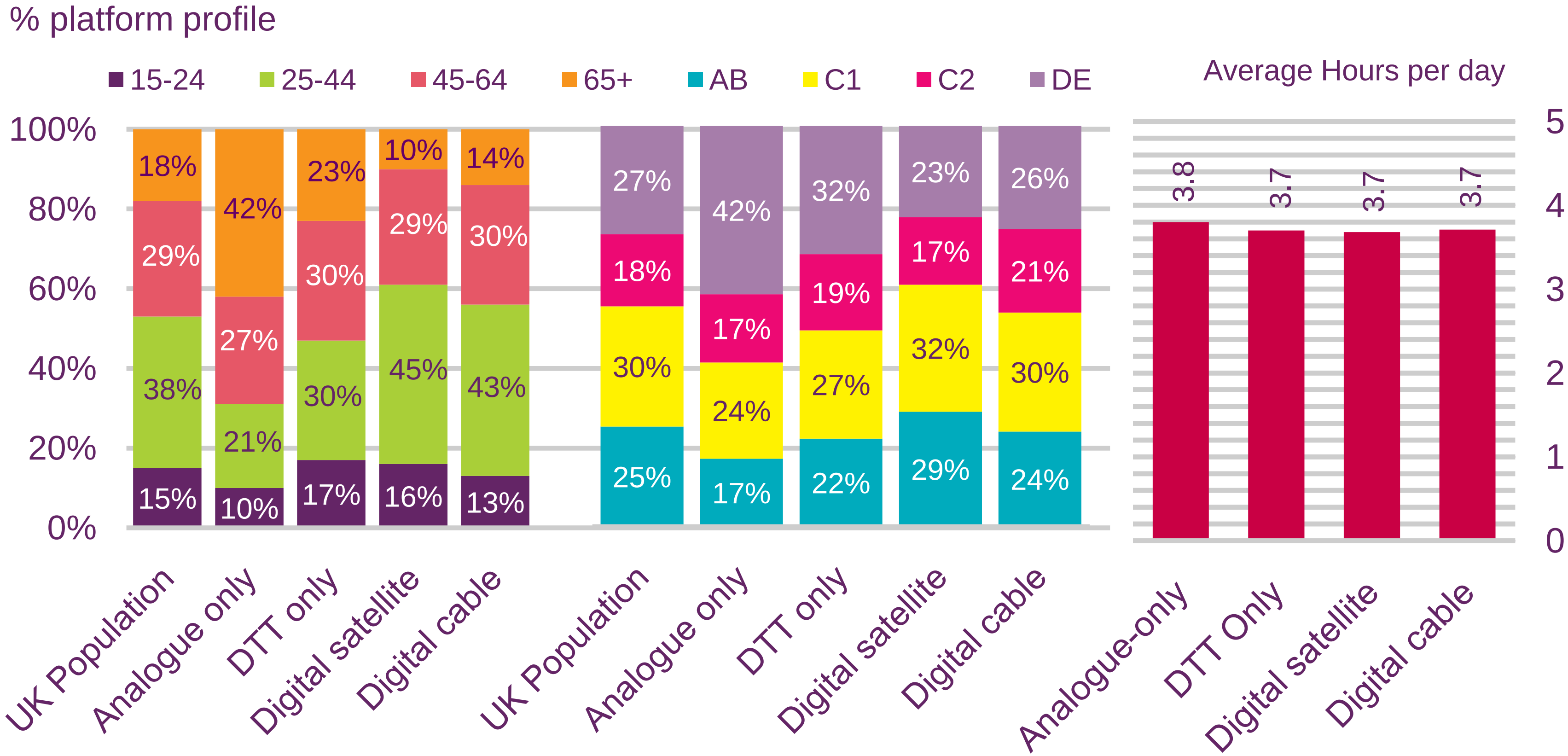
Top 20 TV programmes in 2009, based on average audience

No.	Title	Channel	Date	Day	Start time	End time	Aud' (m)
1	BRITAIN'S GOT TALENT FINAL RESULT	ITV1	30/05/2009	Saturday	21:31	22:00	16.5
2	THE X FACTOR RESULTS	ITV1	13/12/2009	Sunday	19:29	21:26	15.6
3	BRITAIN'S GOT TALENT	ITV1	30/05/2009	Saturday	18:45	20:23	14.8
4	THE X FACTOR	ITV1	21/11/2009	Saturday	20:03	21:17	13.5
5	THE ROYLE FAMILY	BBC1	25/12/2009	Friday	21:01	21:59	11.4
6	EASTENDERS	BBC1	25/12/2009	Friday	20:00	20:59	11.3
7	DOCTOR WHO	BBC1	25/12/2009	Friday	17:59	18:58	11.1
8	STRICTLY COME DANCING	BBC1	19/12/2009	Saturday	20:41	21:45	10.7
9	I'M A CELEBRITY - GET ME OUT OF HERE!	ITV1	21/11/2009	Saturday	21:21	22:21	10.4
10	CORONATION STREET	ITV1	16/11/2009	Monday	20:29	20:55	10.3
11	DANCING ON ICE	ITV1	22/03/2009	Sunday	18:55	20:58	10.2
12	I DREAMED A DREAM - THE SUSAN BOYLE STOR	ITV1	13/12/2009	Sunday	21:34	22:33	10.0
13	COMIC RELIEF	BBC1	13/03/2009	Friday	19:00:	21:59	10.0
14	DOC MARTIN	ITV1	08/11/2009	Sunday	21:02	22:00	9.7
15	GAVIN AND STACEY	BBC1	25/12/2009	Friday	22:00	22:29	9.6
16	CHILDREN IN NEED	BBC1	20/11/2009	Friday	19:00	21:59	9.5
17	THE GRUFFALO	BBC1	25/12/2009	Friday	17:31	17:57	9.5
18	THE ROYAL VARIETY PERFORMANCE	ITV1	16/12/2009	Wednesday	19:29	21:58	9.1
19	THE APPRENTICE	BBC1	03/06/2009	Wednesday	21:00	21:59	9.1
20	JONATHAN CREEK	BBC1	01/01/2009	Thursday	20:59	22:58	9.0

Source: BARB. All individuals (4+). Highest occurrence only.

Figure 2.88

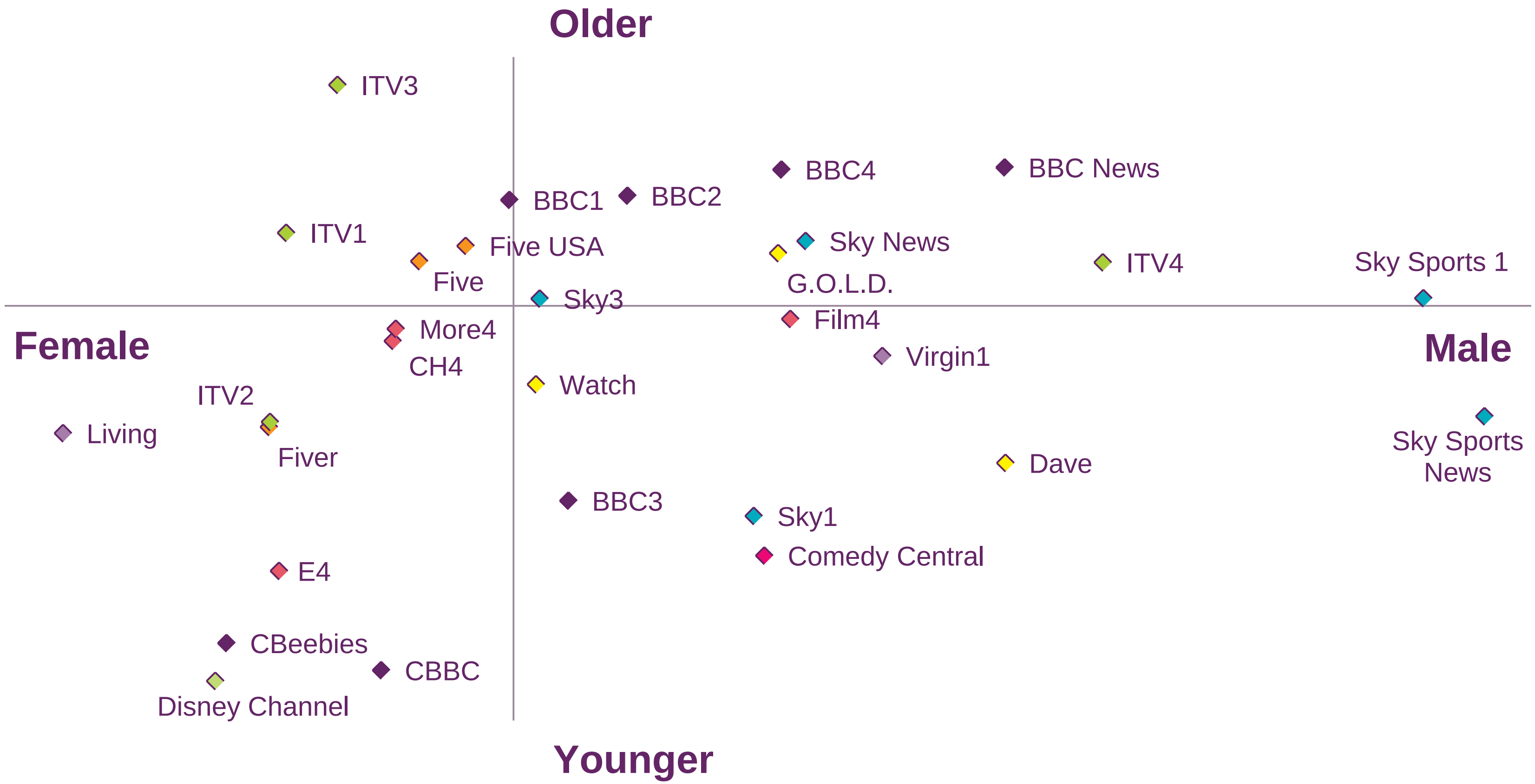
Platform demographics by age, socio-economic group and viewing hours, 2009



Source: Ofcom and BARB

Figure 2.89

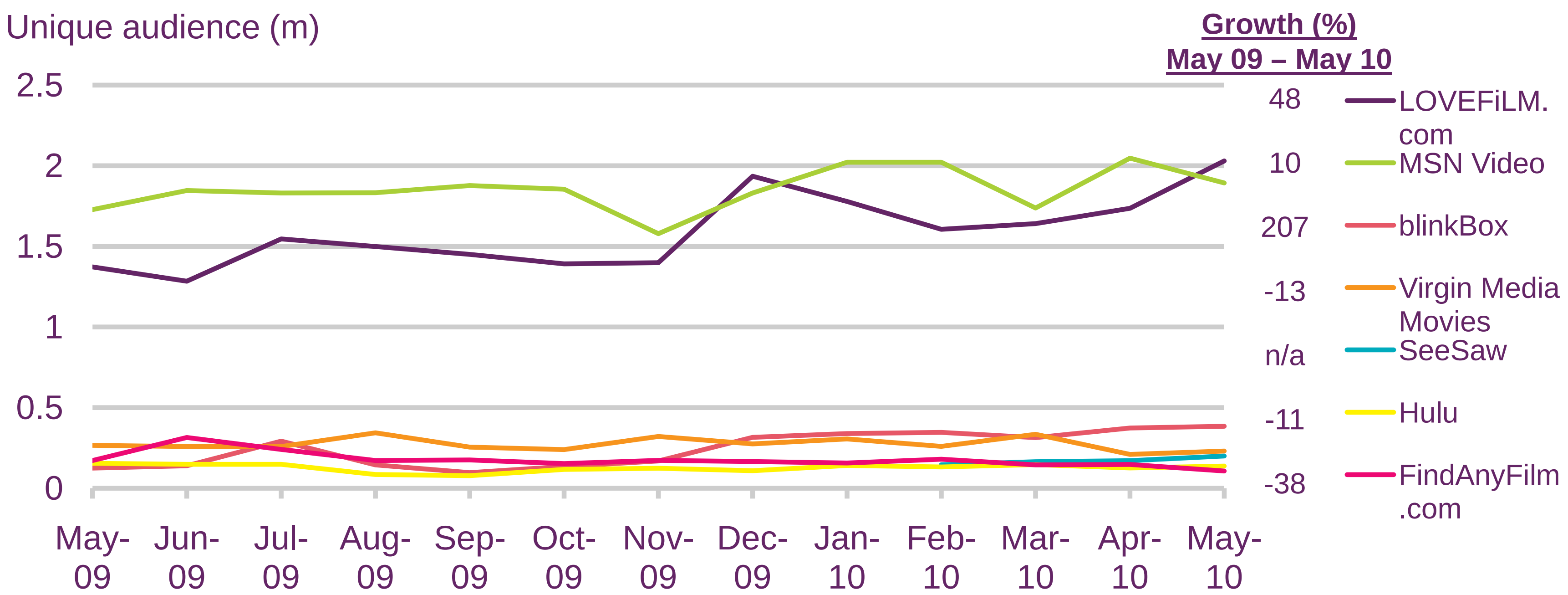
Age and gender profile of the 30 most- viewed channels in multichannel homes



Source: BARB Note: The profile of a channel is calculated relative to the television population in multichannel homes.
Includes channel's +1 services

Figure 2.90

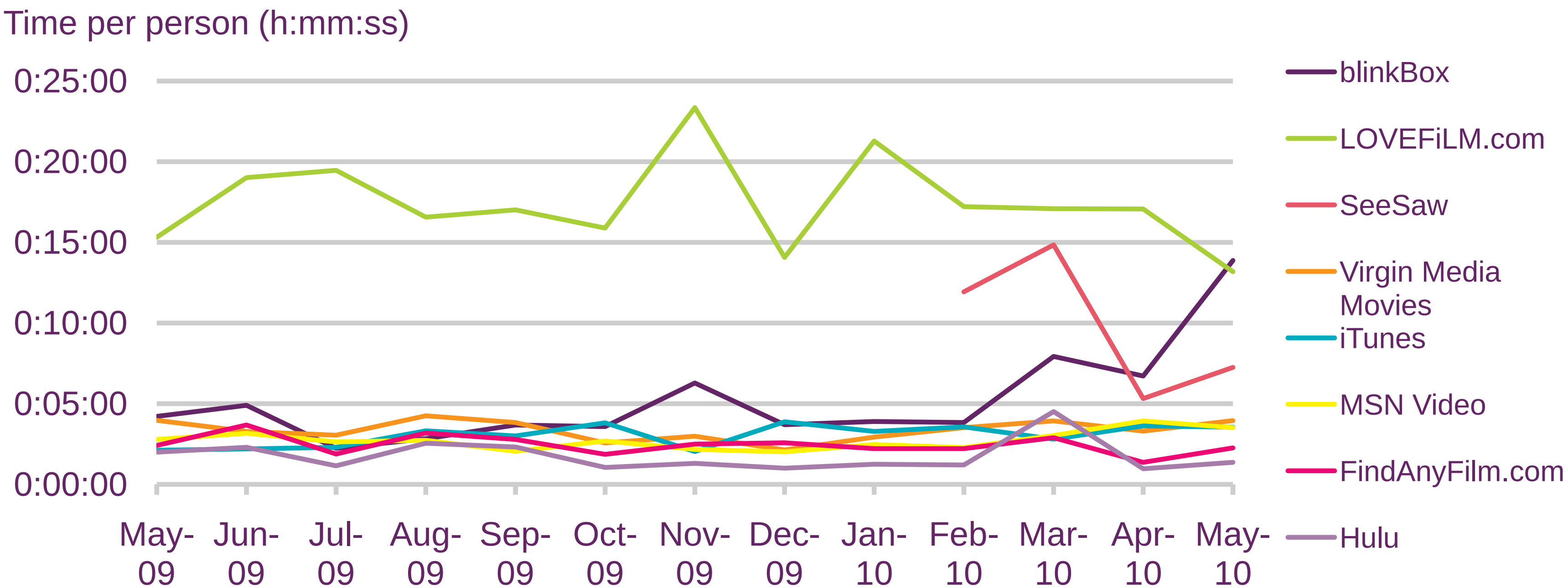
Unique audiences to selected online film and TV sites



Source: UKOM/Nielsen, home and work panel.

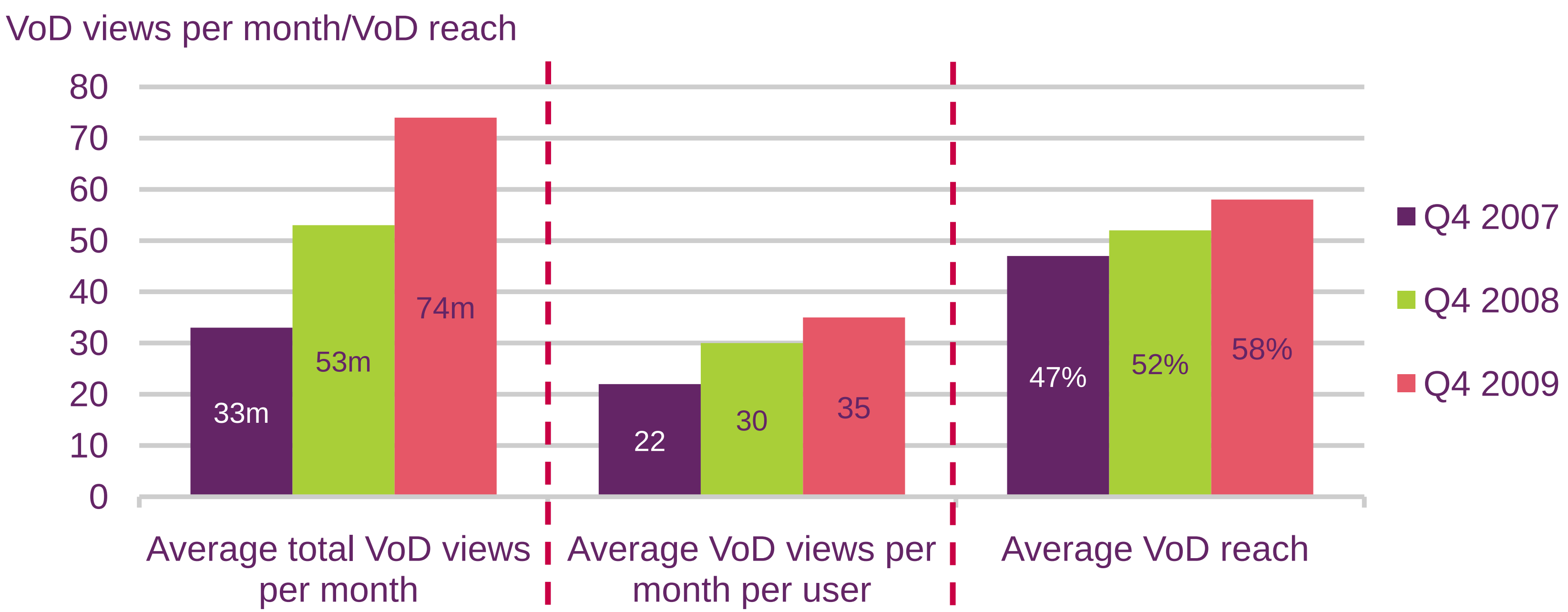
Figure 2.91

Monthly time spent per person on selected online film and TV sites



Source: UKOM/Nielsen, home and work panel.

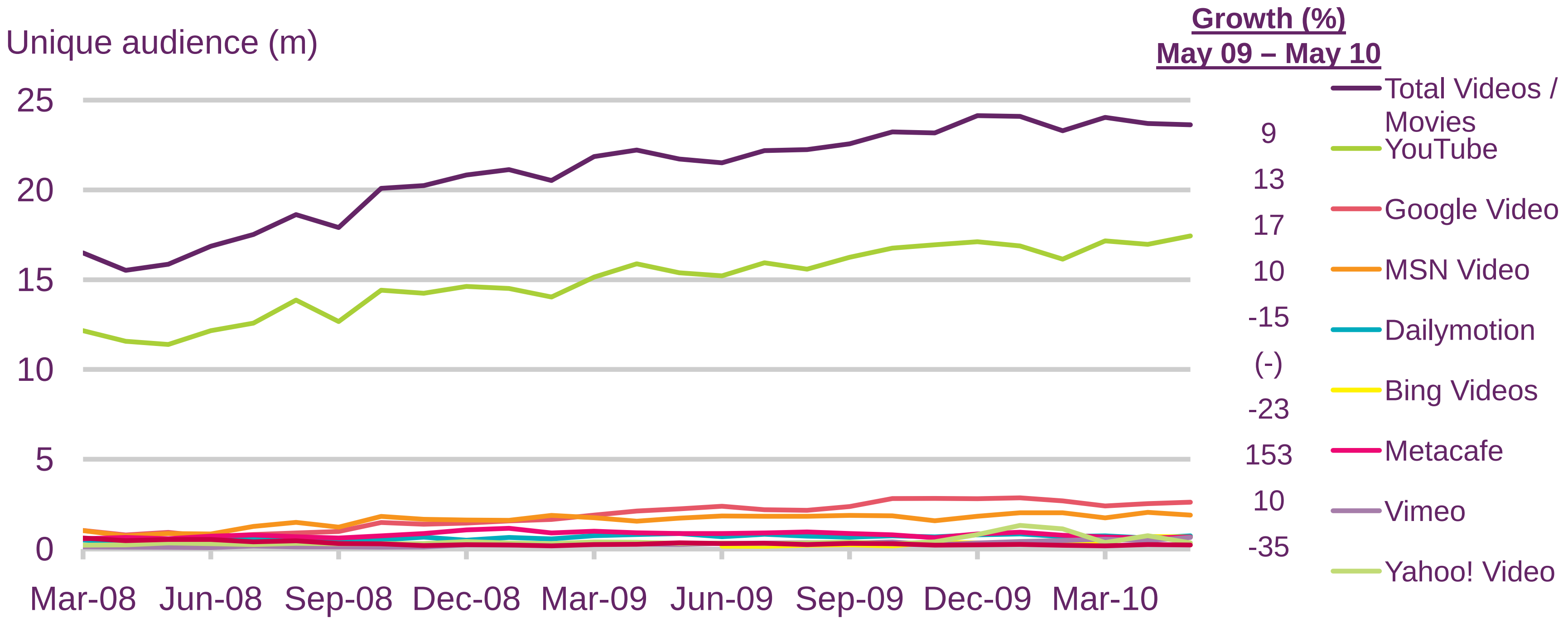
Figure 2.92
Video on-demand use in Virgin Media homes



Source: Virgin Media company results.

Figure 2.93

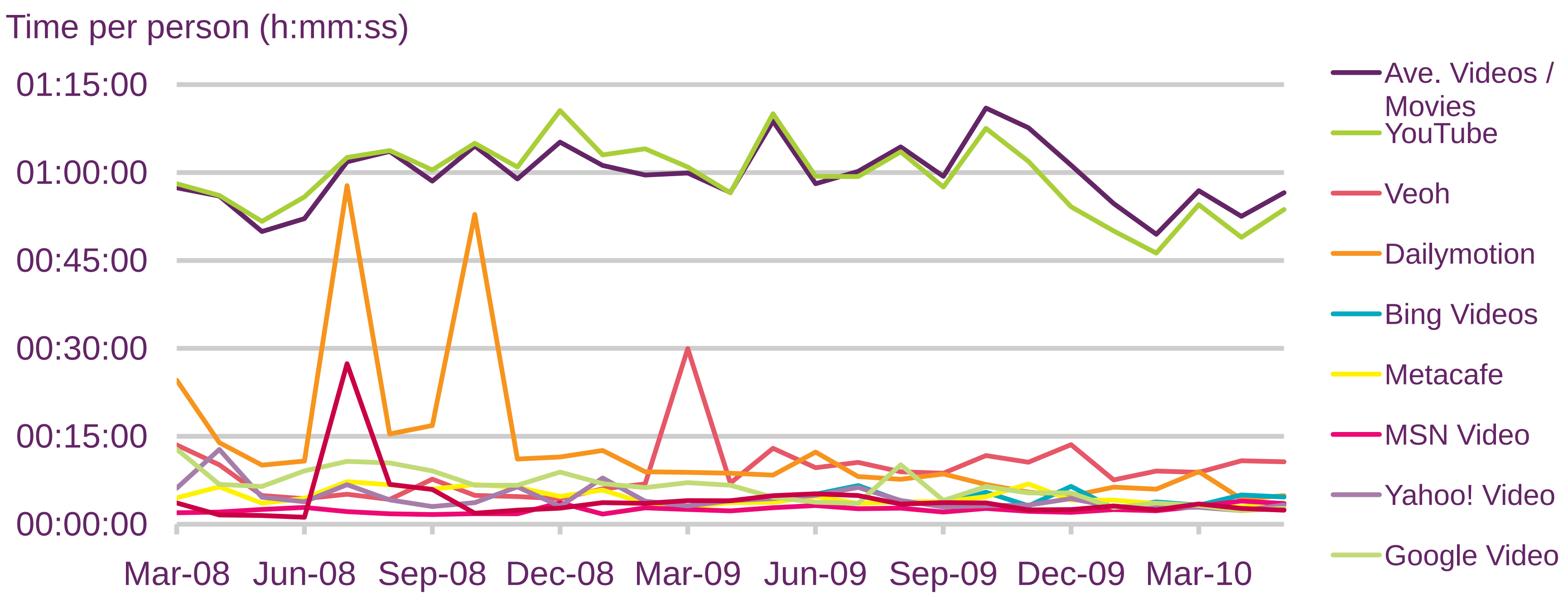
Unique audiences to selected video-sharing sites



Source: UKOM/Nielsen, home and work panel.

Figure 2.94

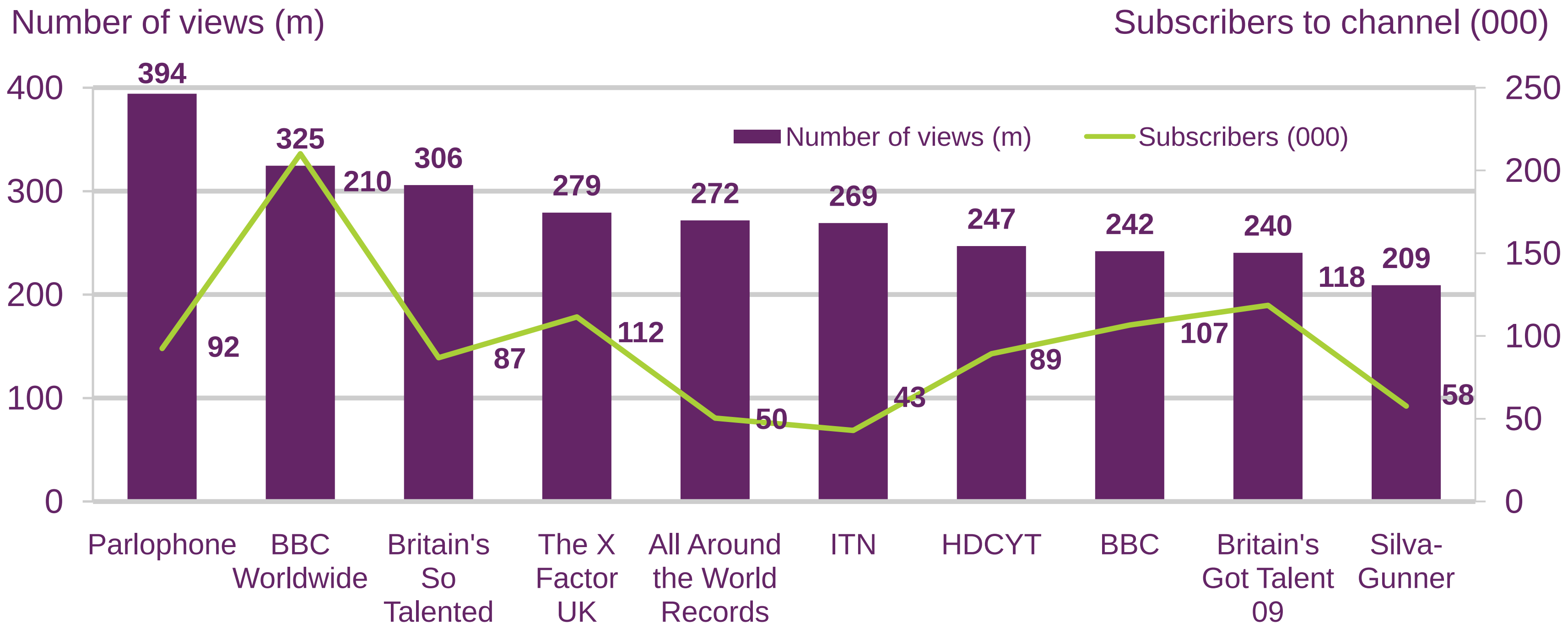
Monthly time spent per person on selected video-sharing sites



Source: UKOM/Nielsen, home and work panel.

Figure 2.95a

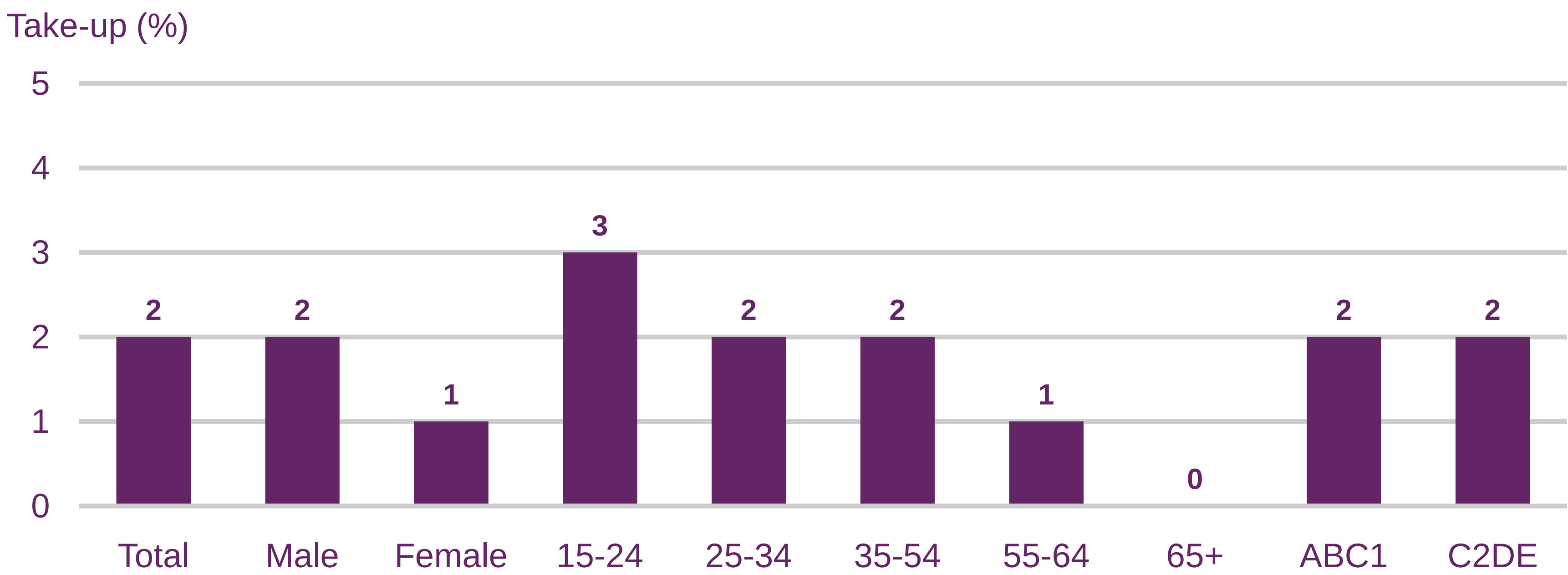
Popularity of top 10 UK YouTube channels



Source: YouTube statistics June 2010

Figure 2.95b

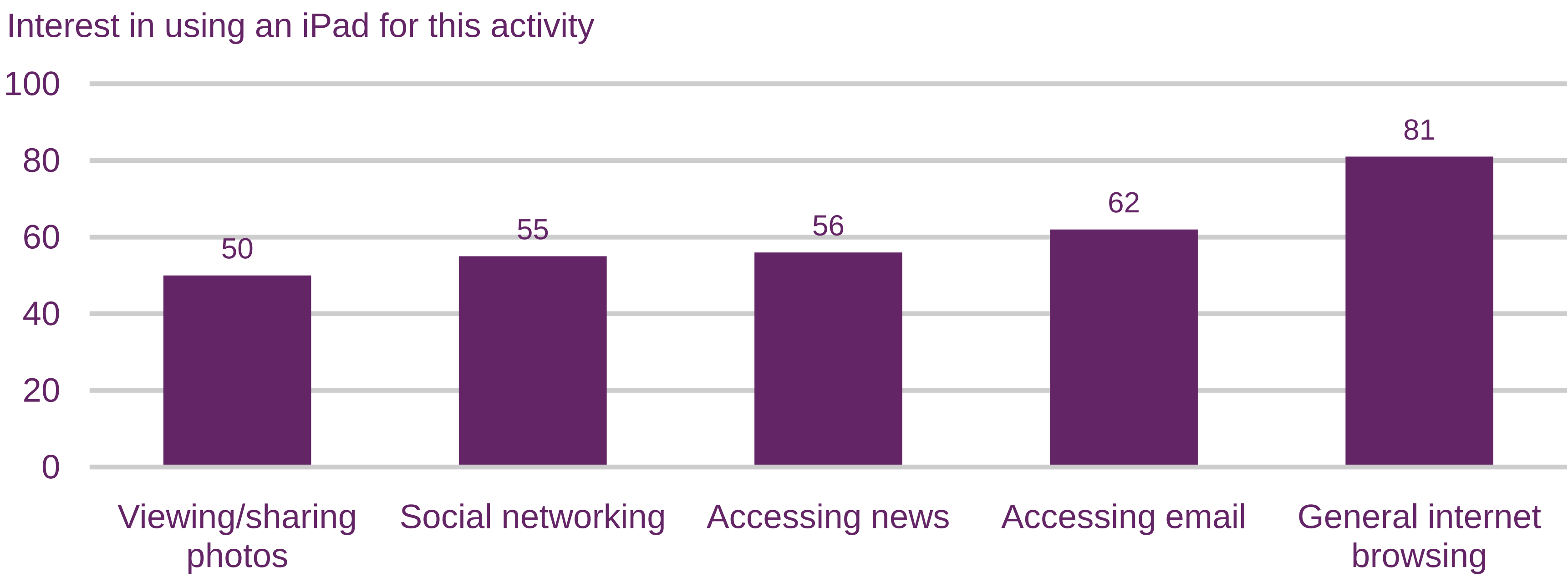
Take-up of e-reader devices



Source: Ofcom research
Base: All adults (6682); males (3204); females (3478); 15-24 (996); 25-44 (2514); 45-64 (1971); 65+ (1200); ABC1 (3633); C2DE (3008).
QB1: Which of the following do you, or does anyone in your household, have in your home at the moment?

Figure 2.95c

Anticipated interest in selected iPad activities (top five)

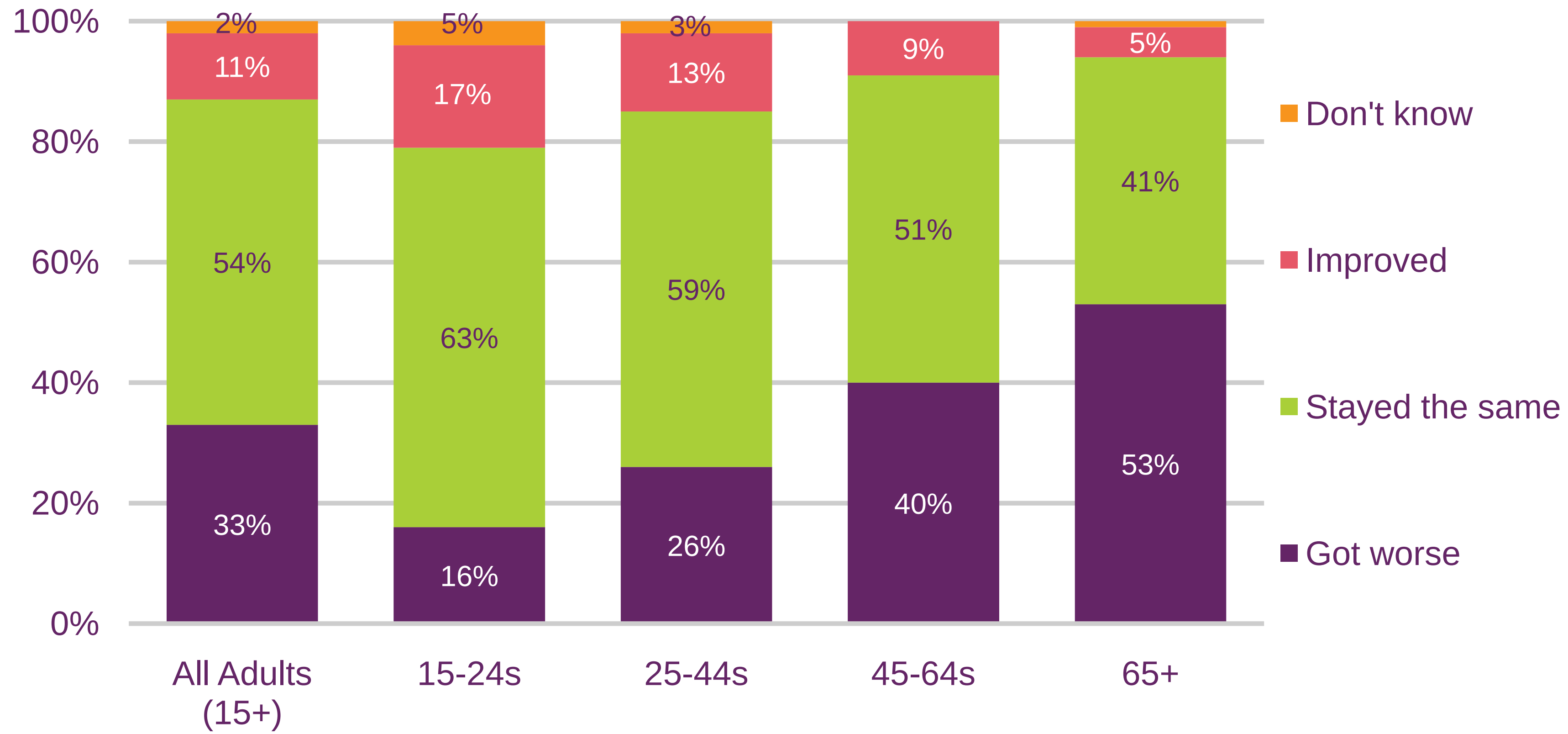


Source: IPSOS MediaCT
Base: all GB adults 15+ interested in owning an iPad (n=521)

Figure 2.96

Consumer attitudes towards television programme standards, by age, 2009

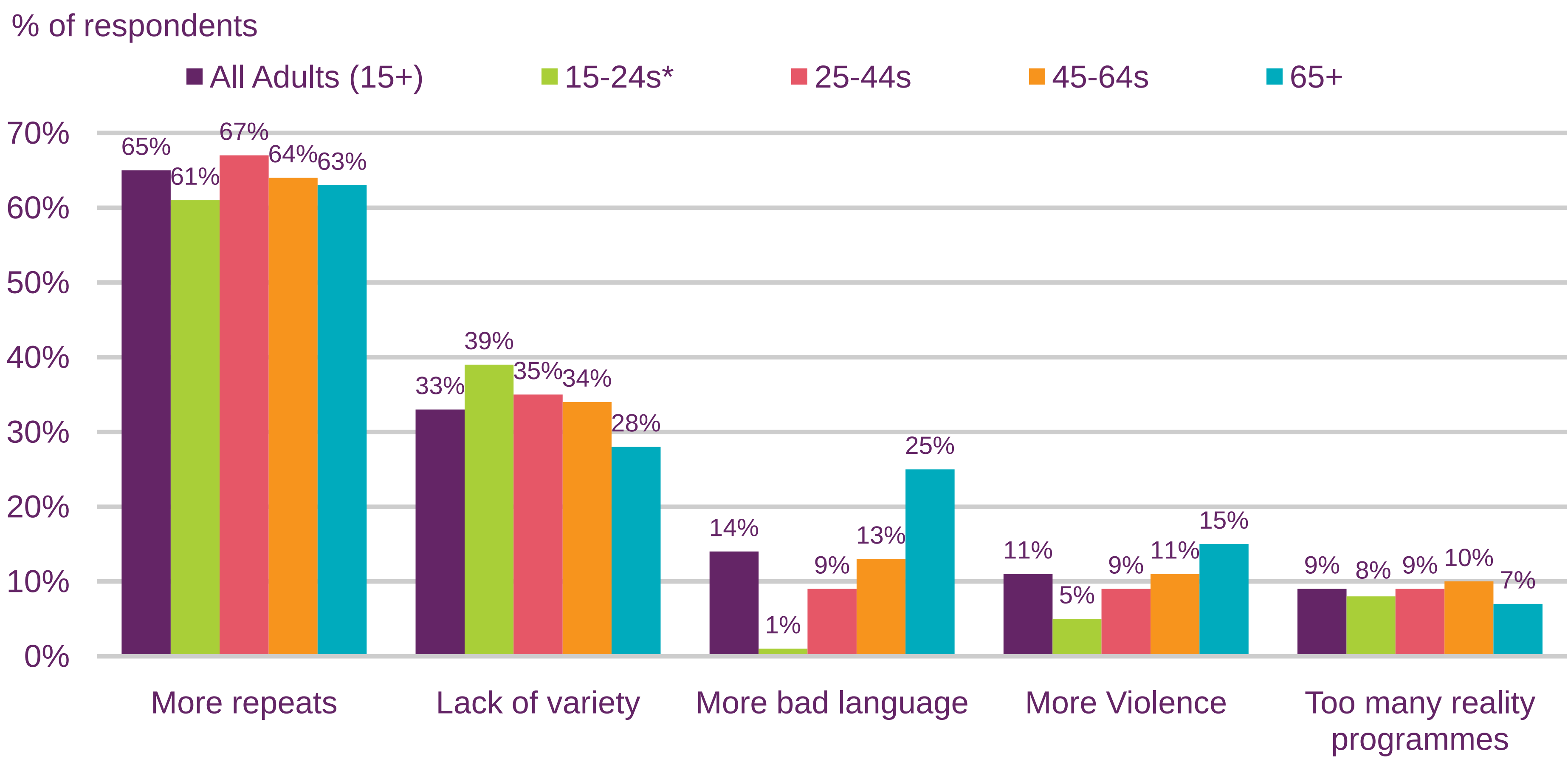
% of respondents



T50 – Do you feel that over the past year, television programmes have improved, got worse or stayed about the same?
Base: All adults aged 15+ (2044) (344 aged 15-24, 749 aged 25-44 ,626 aged 45-64, 325 aged 65+)
Source: Ofcom 2009 Media Tracker survey . Fieldwork carried out by Continental Research, April and October 2009.

Figure 2.97

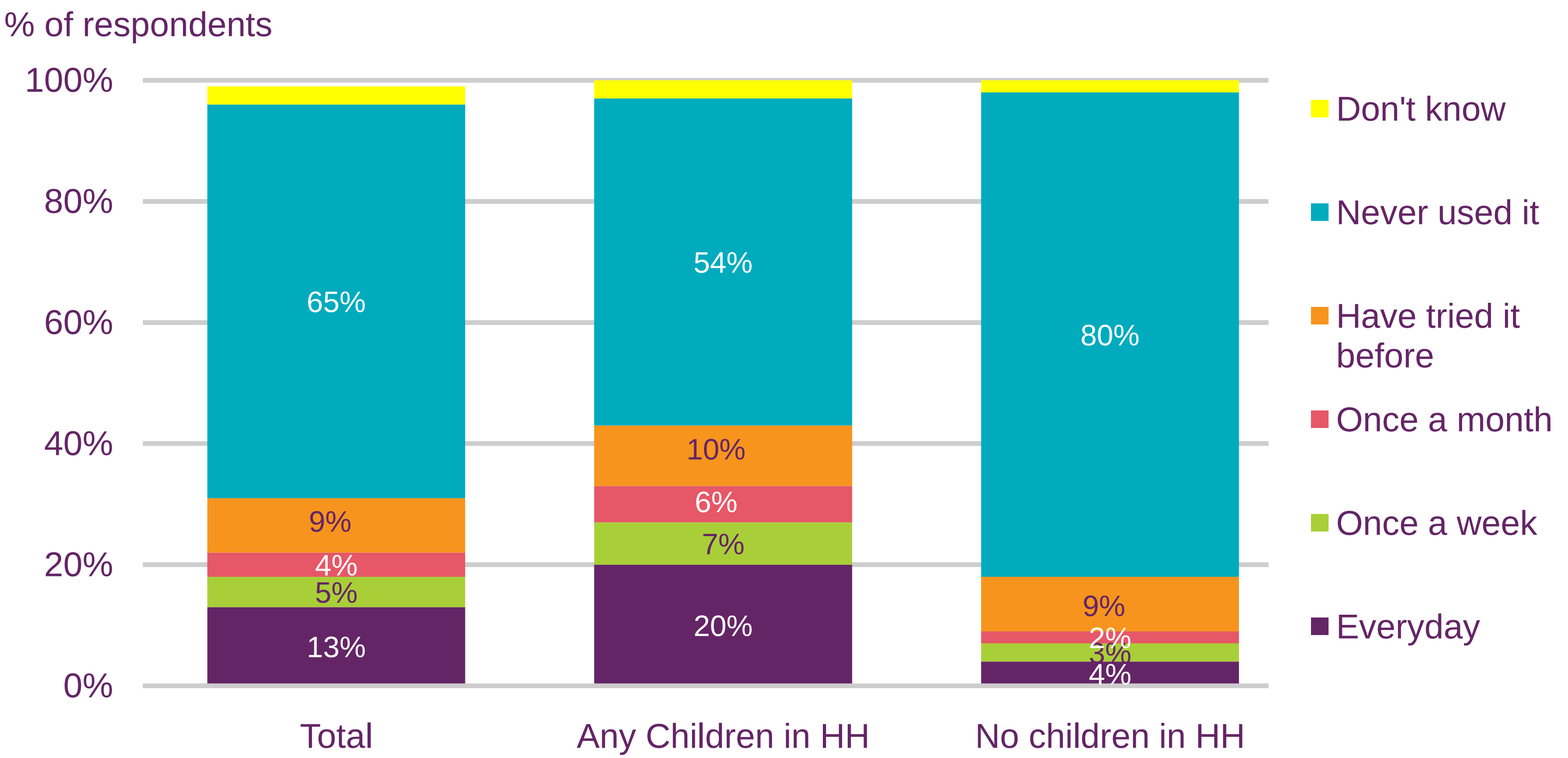
Reasons why viewers thought TV programme quality deteriorated, 2009



Source: Ofcom 2009 Media Tracker survey . Fieldwork carried out by Continental Research, April and October 2009. T52 – In what ways do you think the television programmes have got WORSE over the past year?
Base: All adults 15+ saying programmes got worse over past year (676) (56 aged 15-24, 197 aged 25-44 , 249 aged 45-64, 174 aged 65+). *NOTE: Sample size for 15-24s extremely small – results only to be used for indicative purposes.

Figure 2.98

PIN/password-protected TV, 2009



T71 – How often, if at all, do you use this system?
Base: All adults 15+ with a feature which enables them to block access to certain channels (882) (507 Any children in Household, 375 No children in household)
Source: Ofcom 2009 Media Tracker survey . Fieldwork carried out by Continental Research, April and October 2009.