Figure 2.1

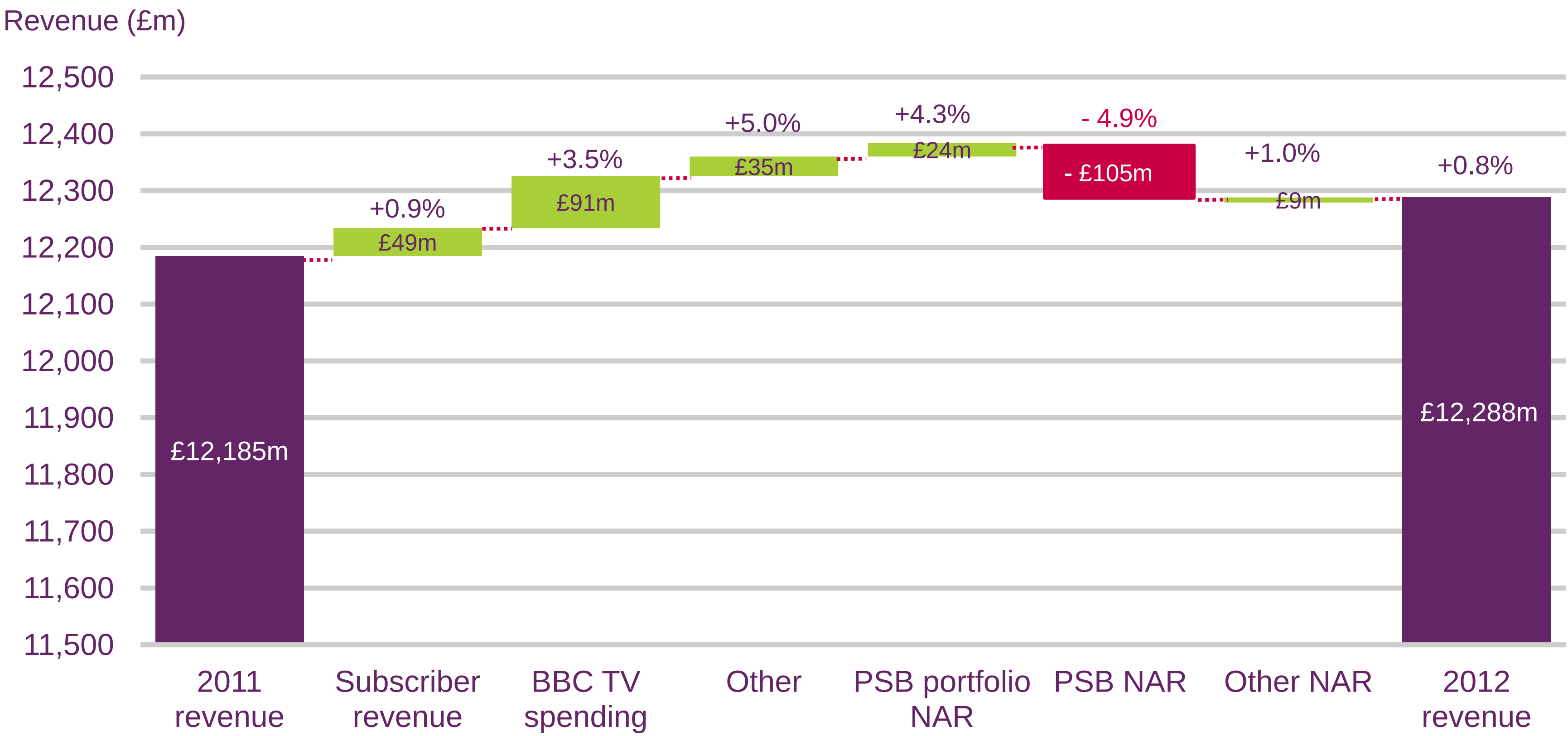
Industry metrics

UK television industry	2007	2008	2009	2010	2011	2012
Total TV industry revenue (£bn)	11.0	11.1	11.0	11.7	12.2	12.3
Proportion of revenue generated by public funds	24%	23%	23%	22%	22%	22%
Proportion of revenue generated by advertising	33%	31%	28%	30%	30%	29%
Proportion of revenue generated by subscriptions	37%	38%	42%	41%	43%	43%
TV as a proportion of total advertising spend	27%	27%	28%	29%	29%	30%
Spend on originated output by 5 main networks (£bn)	2.6	2.6	2.4	2.5	2.5	2.6
Digital TV take-up (% all households)	87%	89%	91%	93%	93%	98%
Proportion of DTV homes paying for TV (Q1)	55%	53%	54%	52%	51%	51%
Viewing per head, per day (hours) in all homes	3.63	3.74	3.75	4.04	4.03	4.01
Share of the five main channels in all homes	64%	61%	58%	56%	54%	52%
Number of channels broadcasting in the UK	470	495	490	510	515	529

Source: Ofcom/broadcasters/Advertising Association/Warc/BARB/GfK. Note: Expressed in nominal terms. 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 (http://expenditurereport.warc.com/); spend on originations includes spend on nations and regions programming (not Welsh and Gaelic language programmes but some Irish language).

Figure 2.2

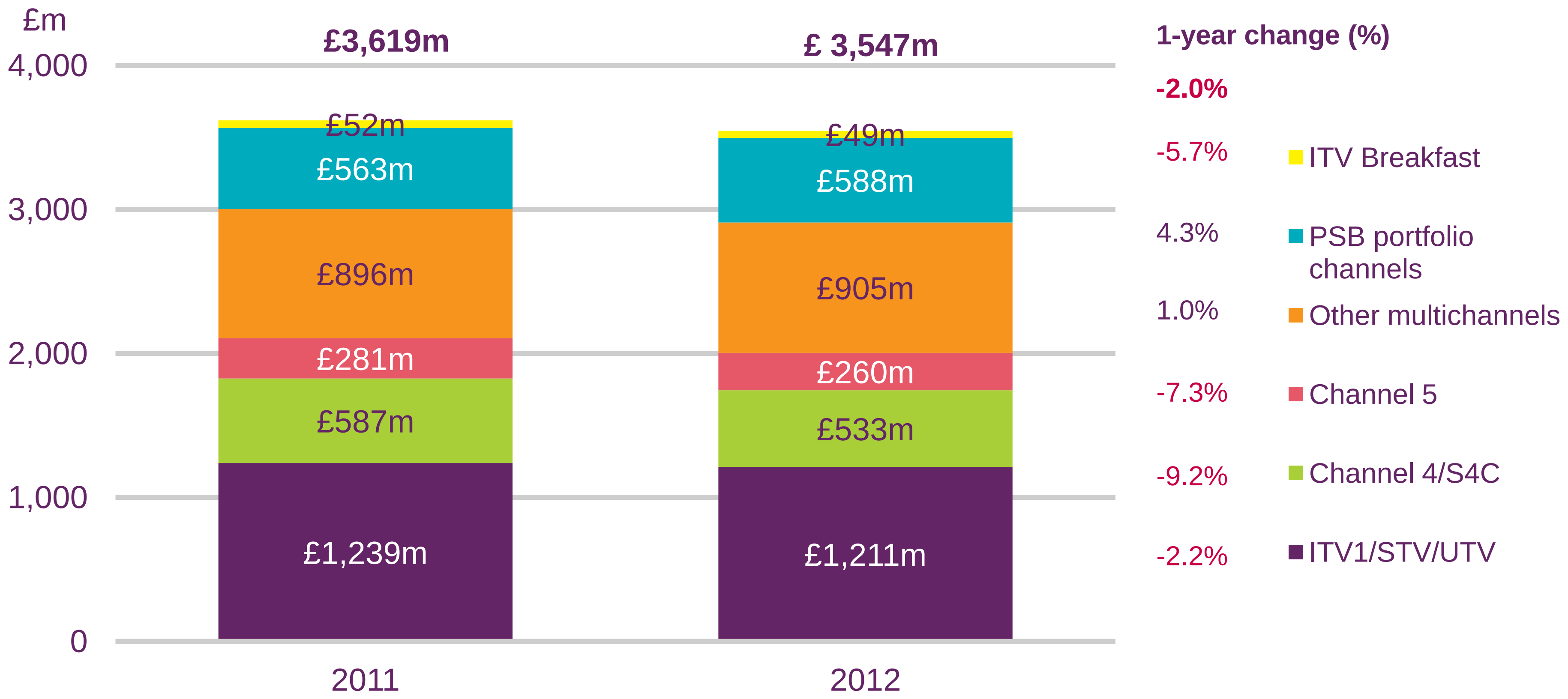
Total TV industry revenue, by source: 2012



Source: Ofcom/broadcasters. Note: Figures expressed in nominal terms. PSB NAR comprises Channel 3 licensees (including ITV Breakfast, ITV Plc, Channel Television, STV and UTV), Channel 4, Channel 5 and S4C. PSB portfolio NAR includes commercial channels owned by the PSBs (ITV2, ITV3, ITV4, E4, More 4, Film 4, 5* and 5USA. 'Other NAR' comprises the rest of the multichannel market. Platform operator revenues do not include installation costs, equipment sales or subsidies. BBC TV spending represents the amount of BBC revenue that is allocated to TV, which is estimated by Ofcom based on Note 2c in the BBC's annual report and accounts 2011/12.

Figure 2.3

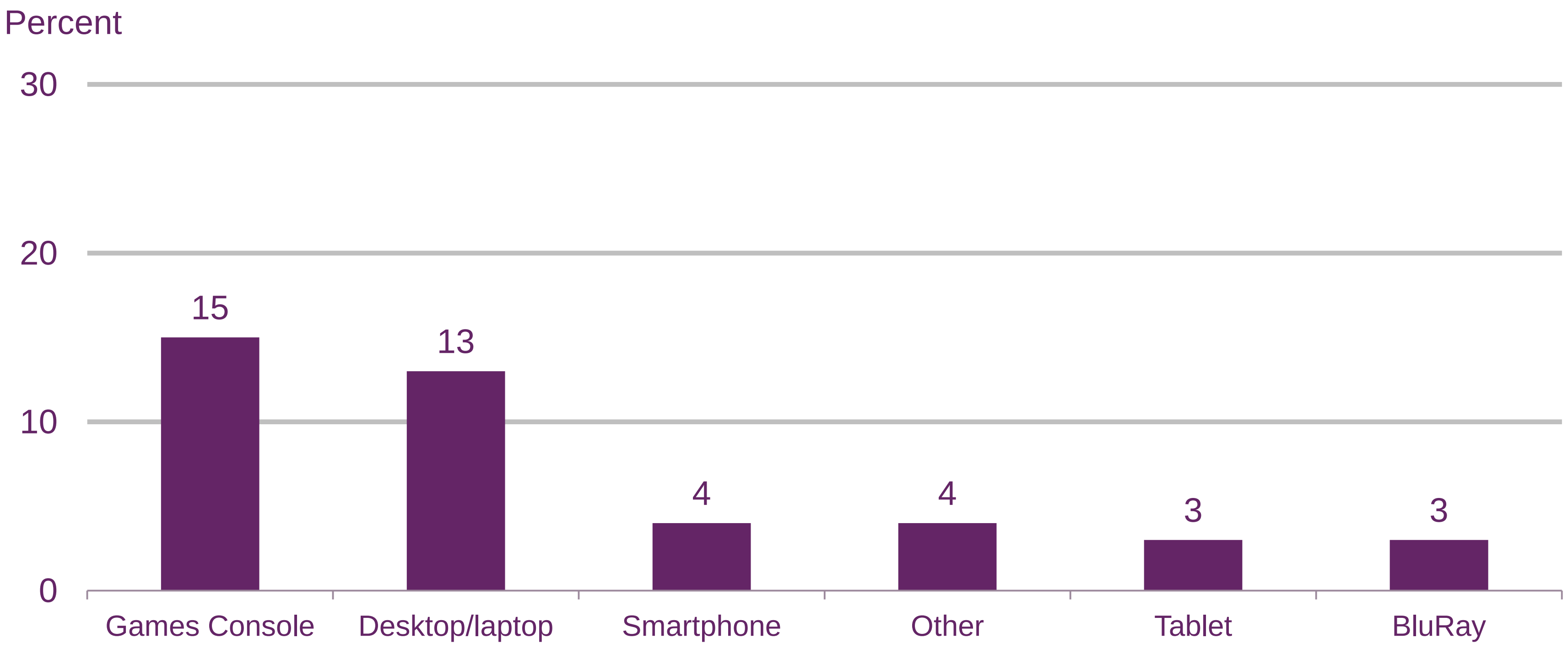
Advertising revenue, by share: 2011 - 2012



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

Figure 2.4

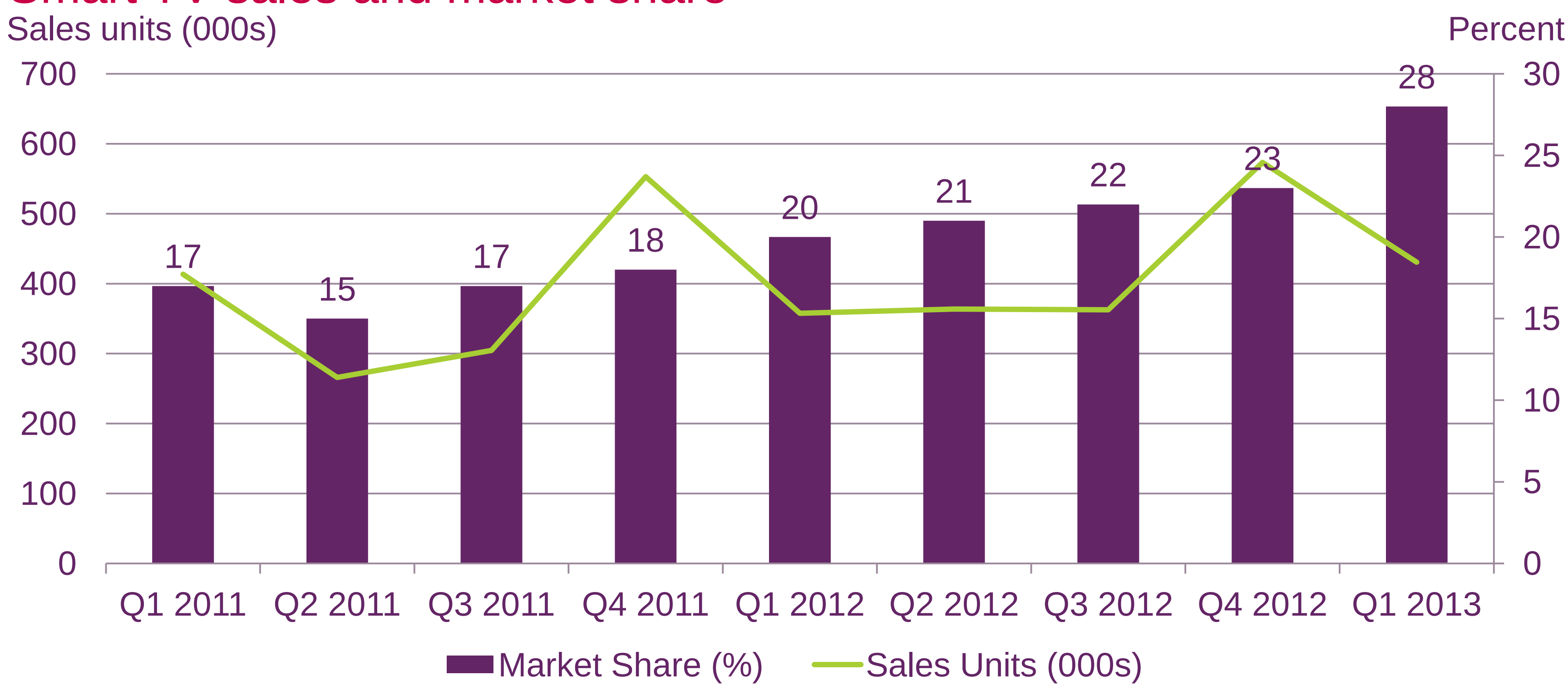
Use of different devices to connect TV to the internet



Source: Ofcom Consumer Segmentation Survey, February 2013.
Q.OCD27 Do you or anyone in your household use any of the following devices to connect your main TV to the internet?
Base: All who have a television and can connect to the internet

Figure 2.5

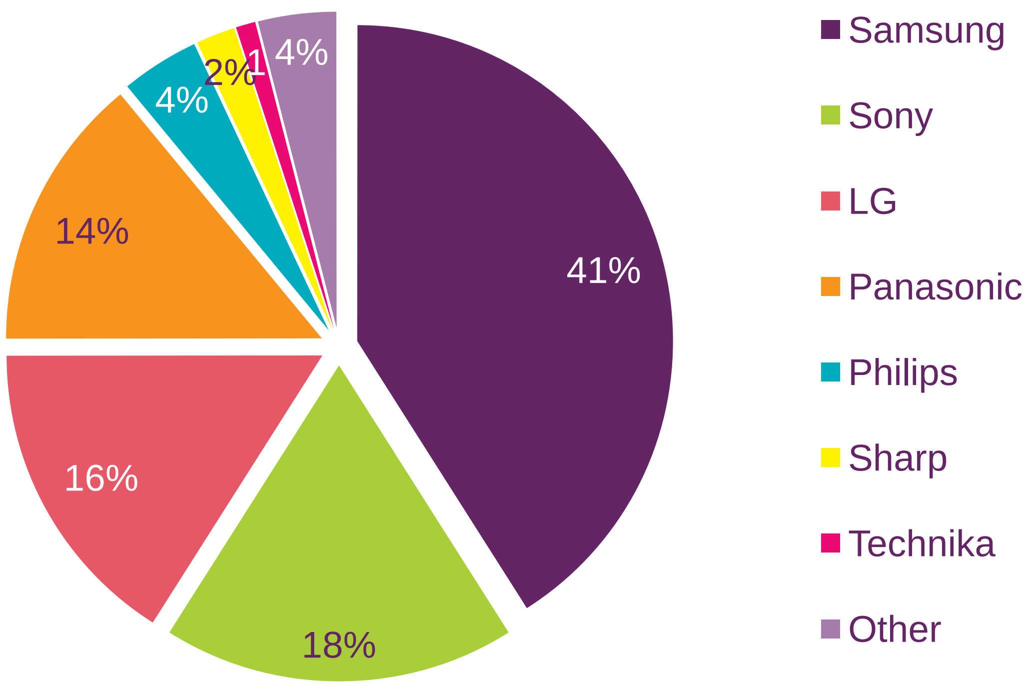
Smart TV sales and market share



Source: GfK

Figure 2.6

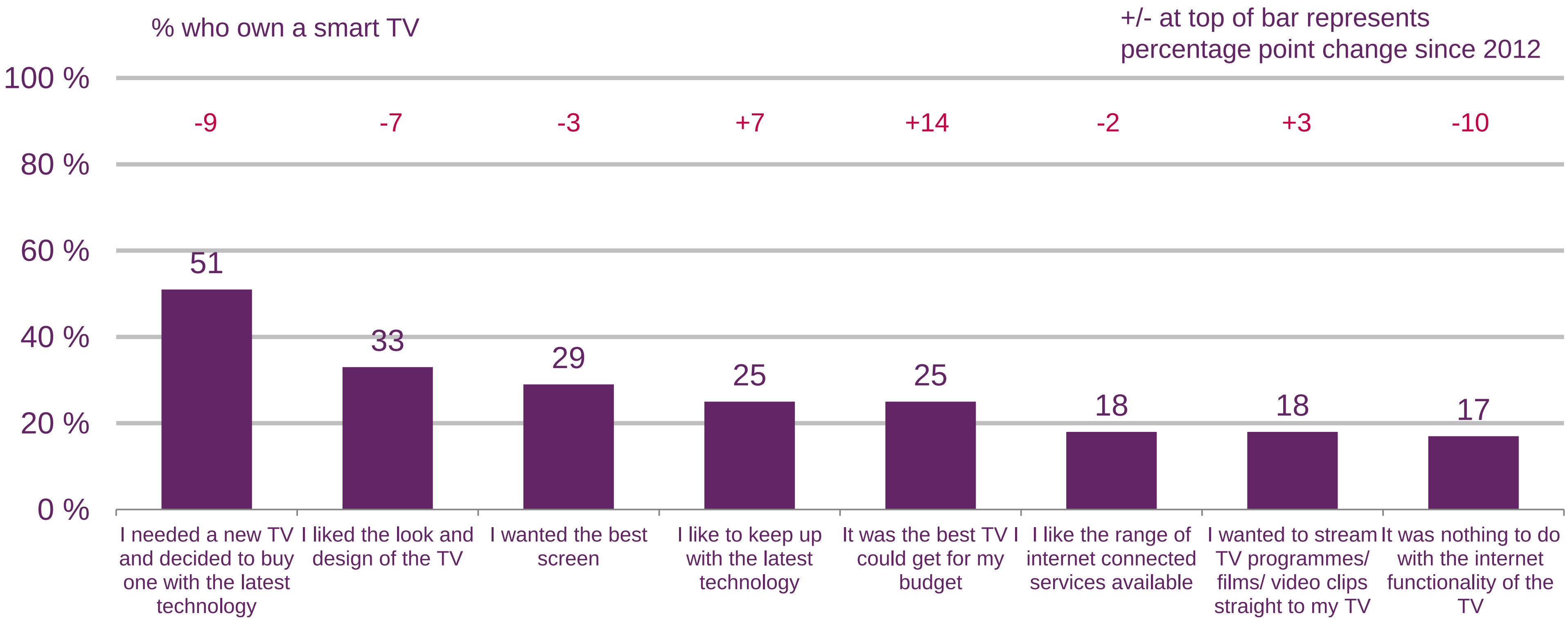
Ownership, by smart TV brand



Source: Ofcom online survey, 2013
QB4.What brand of smart TV is it?
Unweighted base: All respondents who own a smart TV (670)
)

Figure 2.7

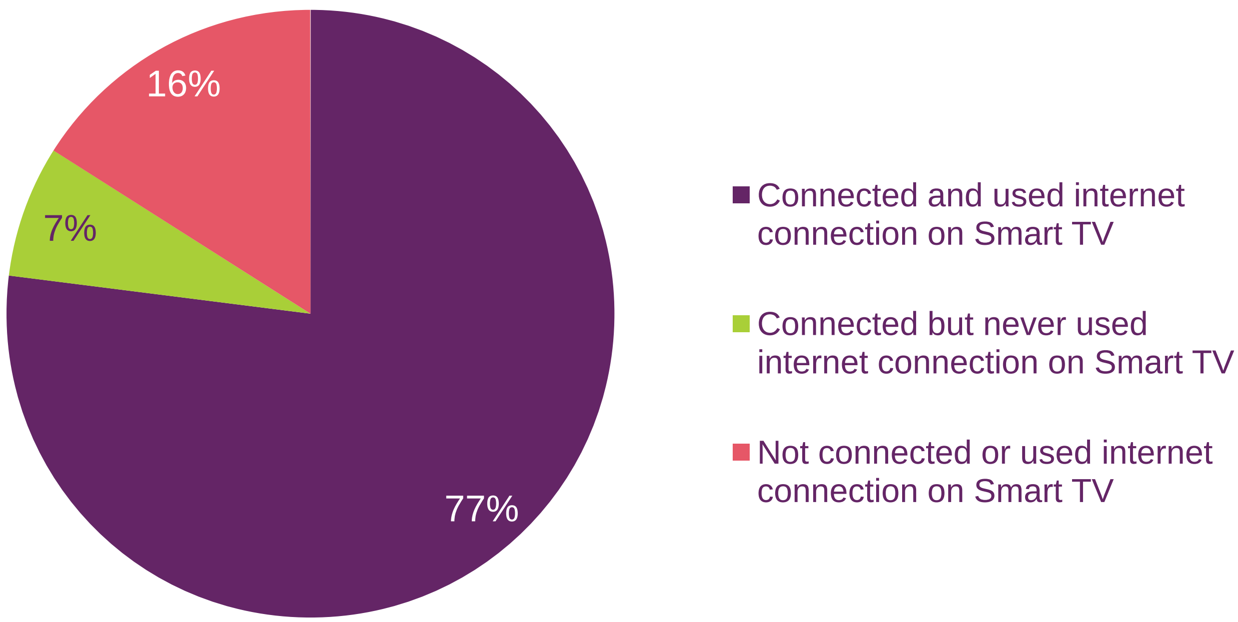
Reasons people buy a smart TV



Source: Ofcom online survey, 2013
QB2. Why did you decide to buy your smart TV?
Base: All respondents who own a smart TV (670)

Figure 2.8

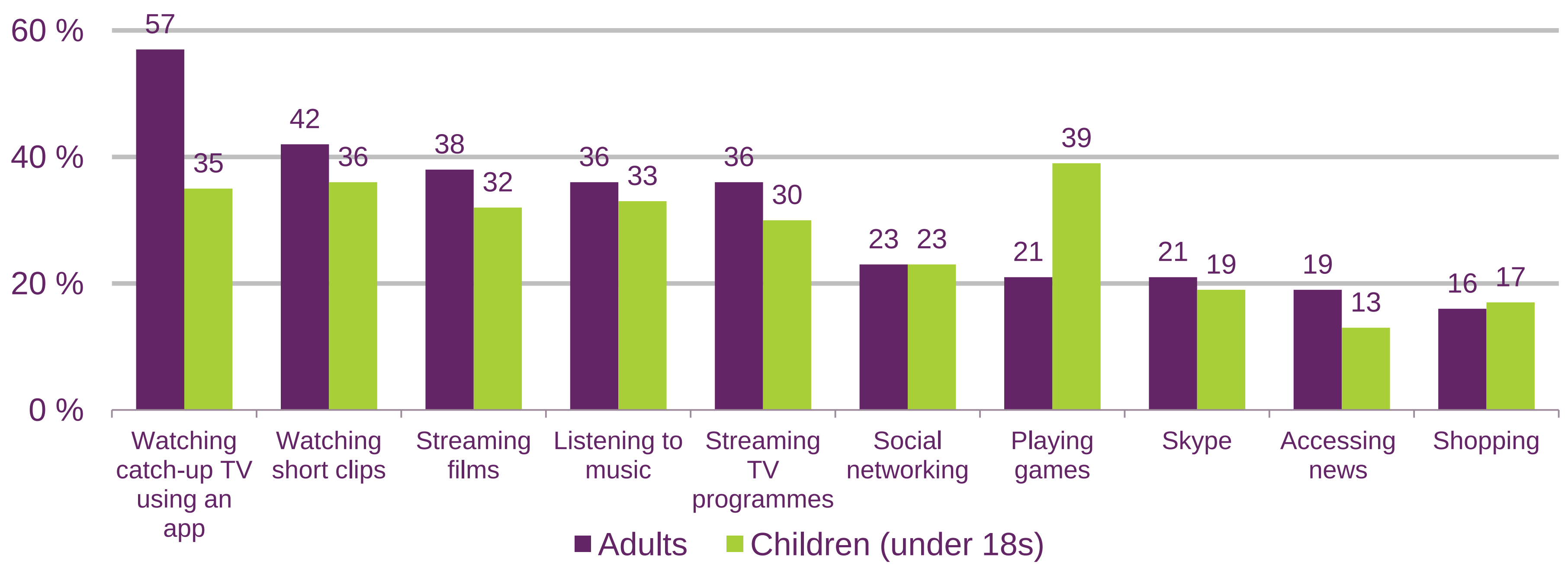
Consumers’ use of internet connection on smart TVs



Source: Ofcom online survey 2013
(1) Q.S6. And is your smart TV connected to the internet allowing you to use the internet functionality? (2) Q.A5. Have you ever used the internet connection on your smart TV set?
Base: All respondents who own a smart TV (670); (2) All respondents who have used the internet functionality of their smart TV (541).

Figure 2.9

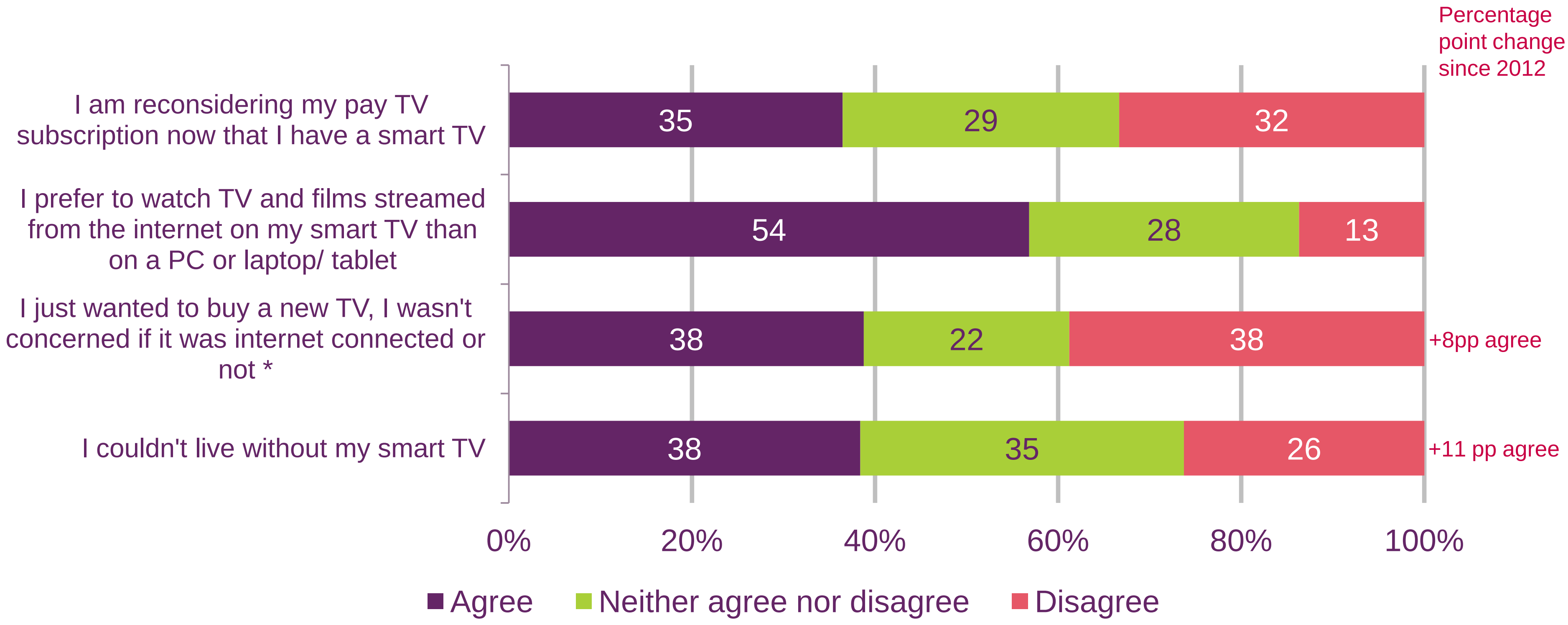
Activities undertaken on smart TVs among adults and children



Source: Ofcom online survey 2013
(1) Q.B8. Which of the following, if any, do you use the internet functionality of your Smart TV for? (2) Q.B15. What types of activity are they doing?
Base: (1) All respondents who have used the internet functionality of their Smart TV (541) (2) Smart TV owners with children under the age of 18 years who use the internet functionality on the Smart TV set at least sometimes (253).

Figure 2.10

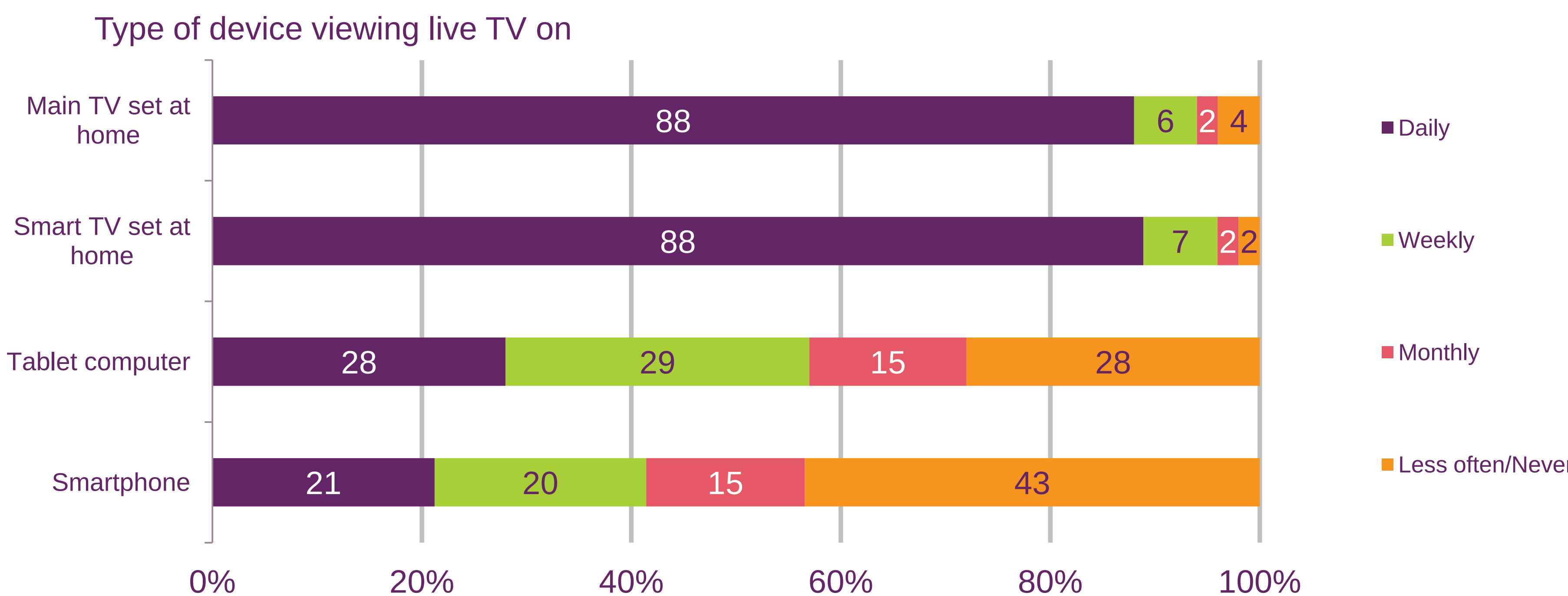
Attitudes towards smart TVs



Source: Ofcom online survey 2013
Q.B16. To what extent do you agree or disagree with the following statements?
Base: (1) All respondents who have used the internet functionality on their smart TV (541) (2) Those with a smart TV who subscribe to pay TV (536)
Note:*Among all respondents who own a smart TV (670), 42% agreed, 23% neither agreed nor disagreed and 34% disagreed.

Figure 2.11

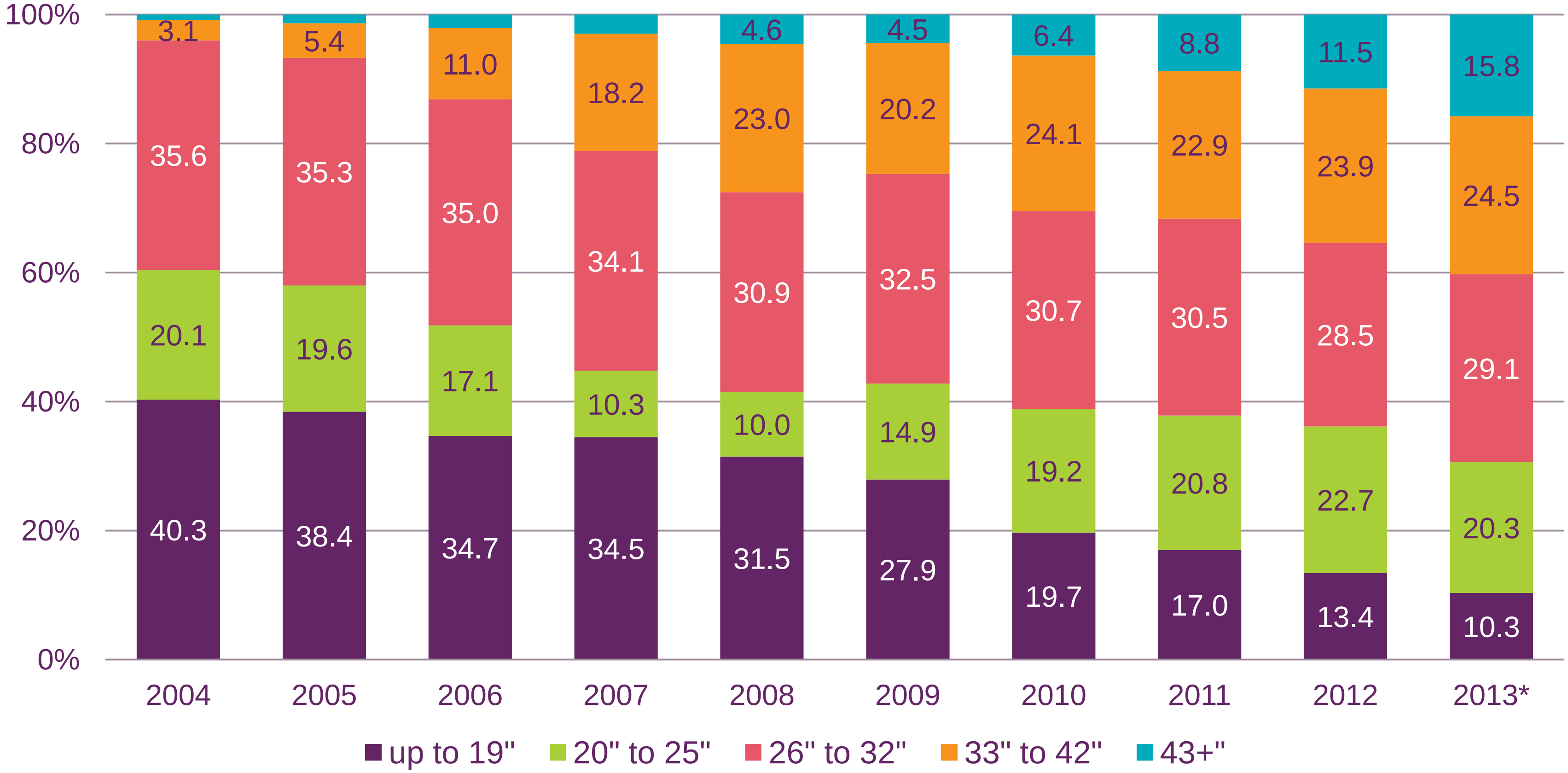
Frequency of viewing live TV, by device



Source: Ofcom online survey 2013
QA1. How often, if at all do you watch TV on your main TV/smart TV/tablet/smartphone?
Unweighted base: All respondents own at least one device (main TV non-smart (972), smart TV (670), tablet computer (869), smartphone(772).

Figure 2.12

Percentage of TV sets sold, by screen size: 2004 to Q1 2013

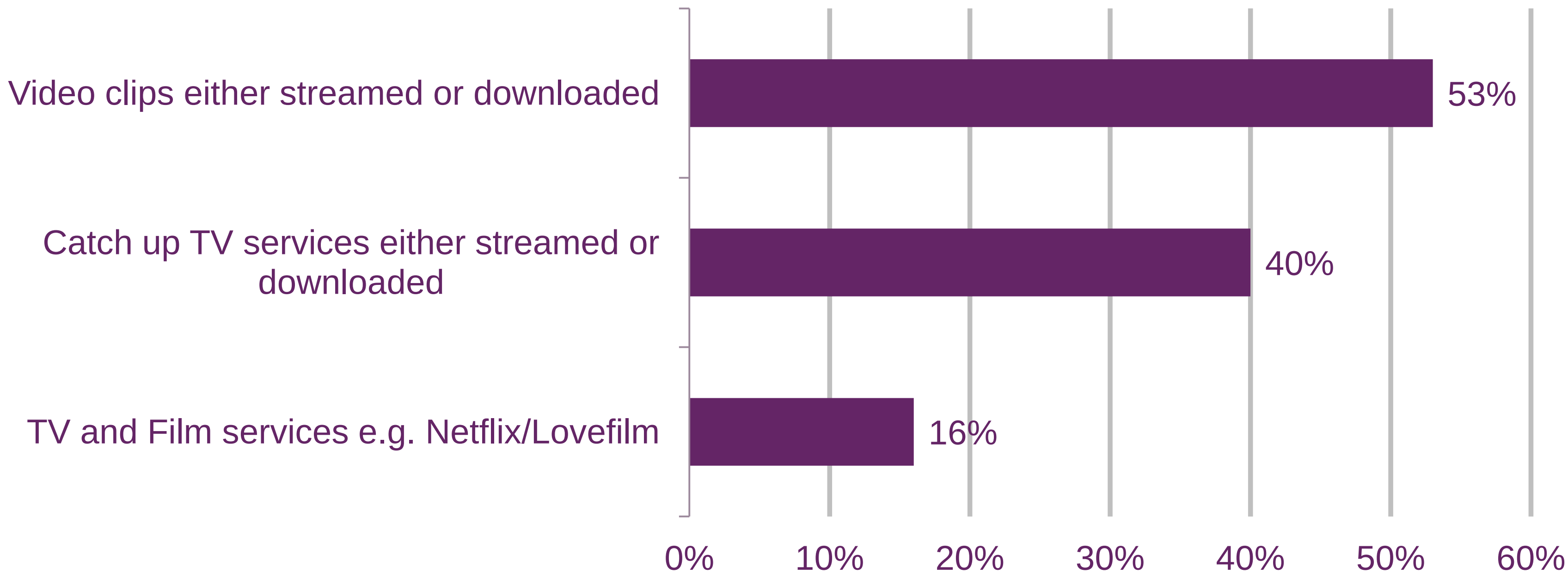


Source: GfK sales data estimates. *2013 data represents Q1 only.

Figure 2.13

Claimed consumption of audio-visual content online

Type of content regularly viewed online (%)



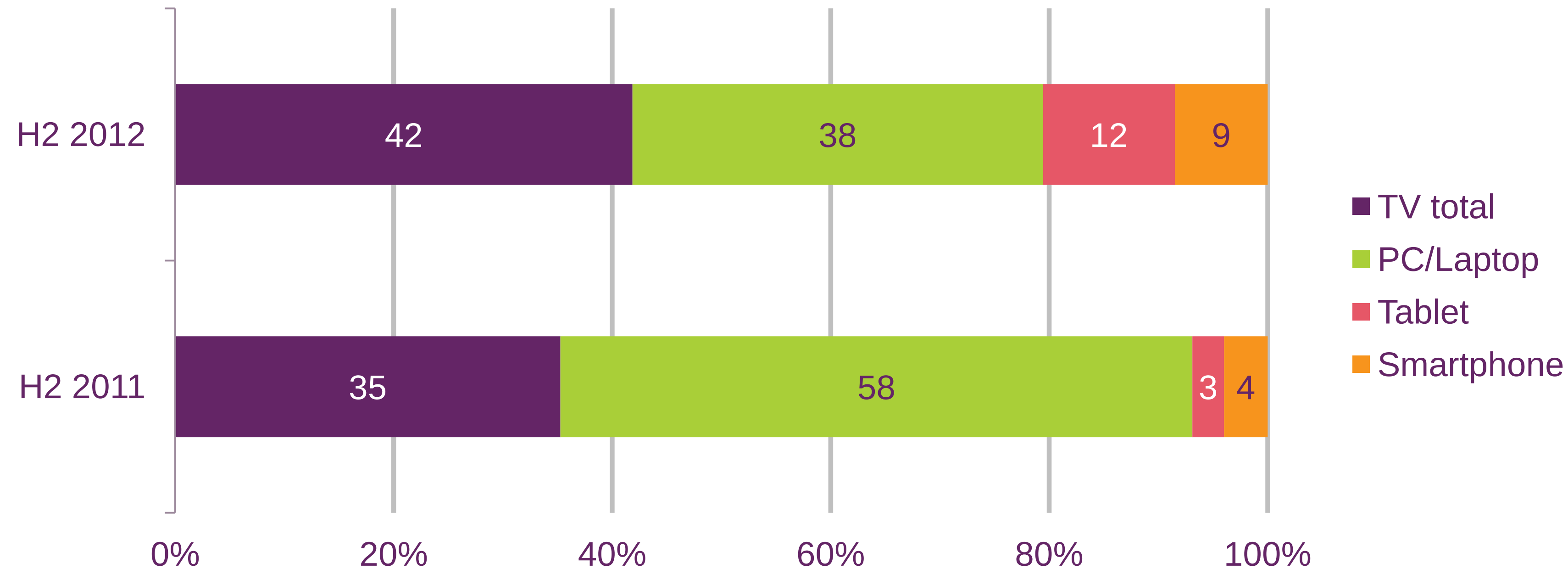
Source: Ofcom Segmentation Survey, February 2013 QT1: Which, if any, of these activities do you do regularly, at least once a month, and on which of your devices (pc/laptop, tablet, smartphone, games console, smart TV or other connected device)? Base: All Adults aged 15+

Figure 2.14

Estimated share of the UK long-form ‘pull’ VOD market, by device

(programmes/films, not short clips or videos)

% Share

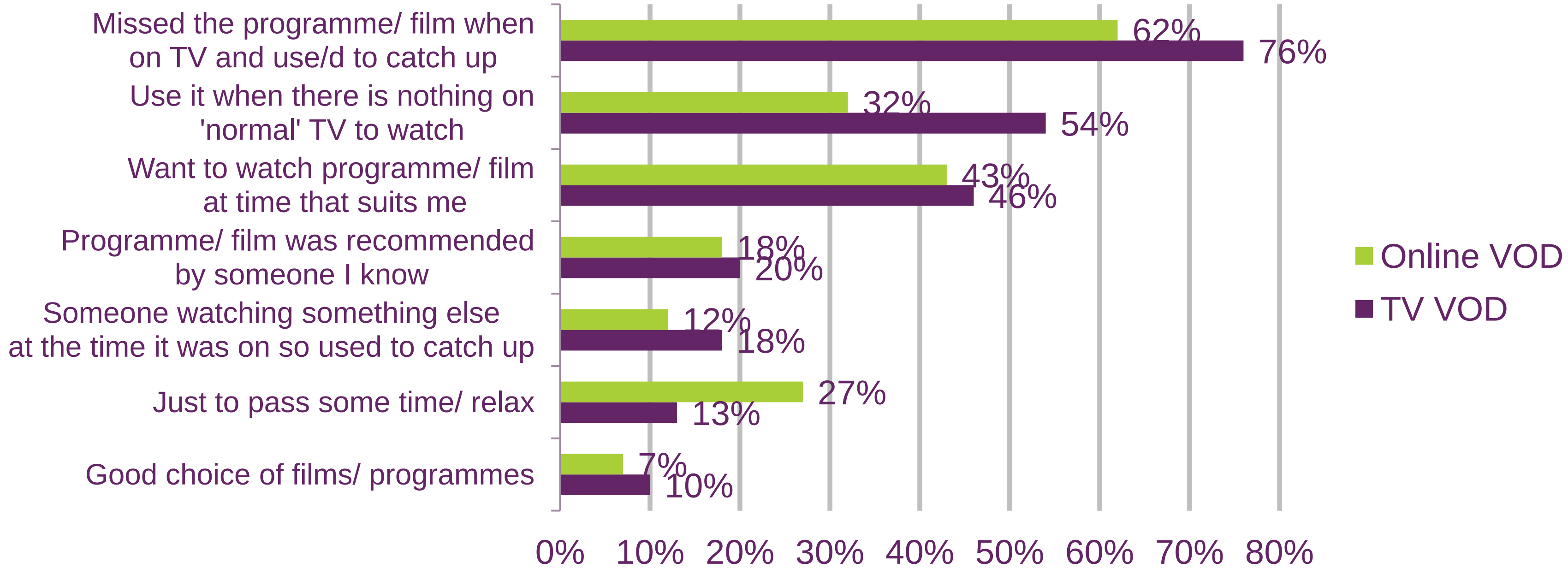


Source: 3 Reasons LLP. Estimates are based on the number of initiated long-form content streams delivered lawfully, from a range of sources including press disclosures and published company results.
Note: Pull VOD is a form of video on-demand distribution where content is delivered online at a user’s request.

Figure 2.15

Reason for video-on-demand use: TV vs. online

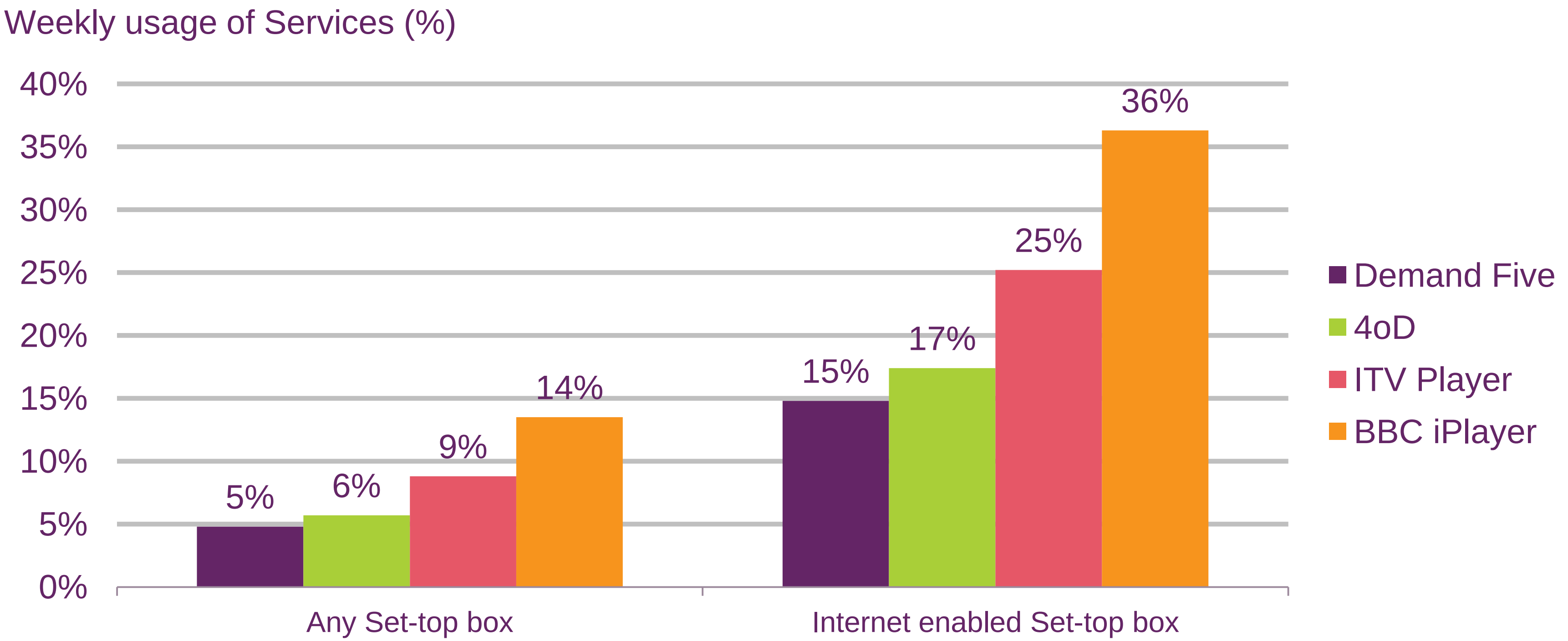
Claimed reason %



Source: Ofcom Media tracker 2012. Base: TV VOD: All who use TV ‘video on demand’ (541), Online VOD: All who use online ‘video on demand’ (725),

Figure 2.16

Claimed weekly use of TV catch-up services via set-top boxes

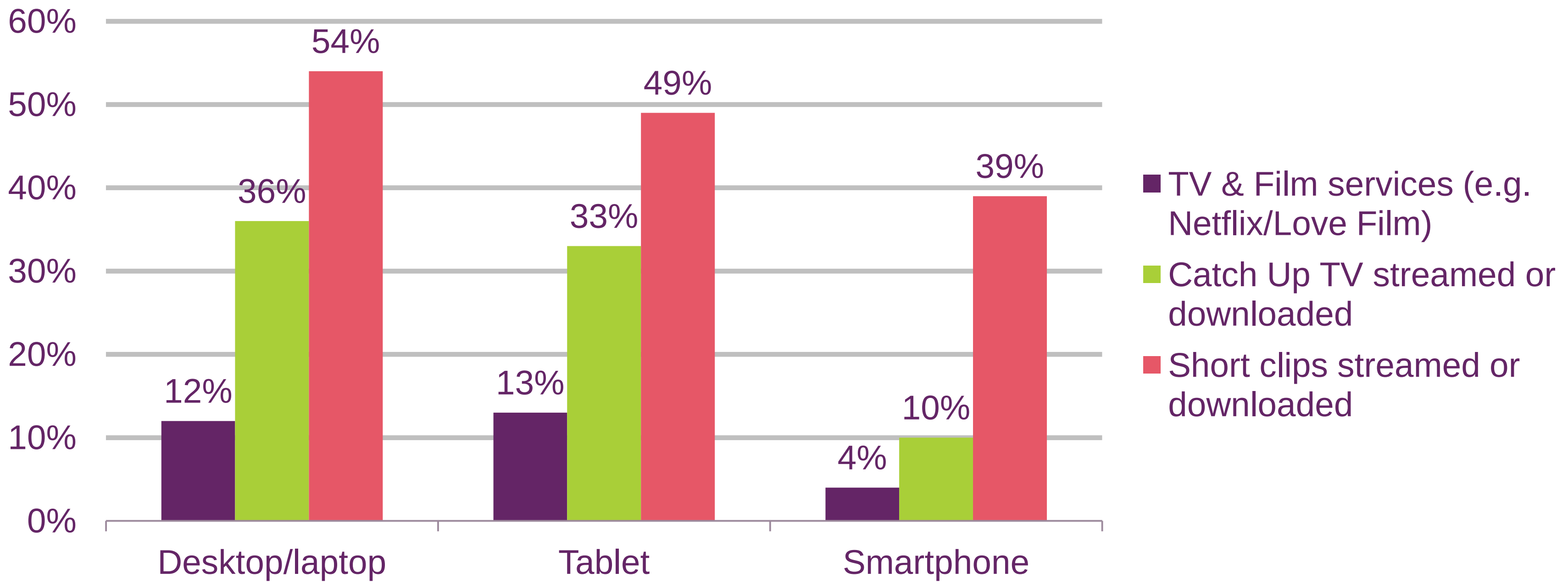


Source: Mediabug Tracker, Decipher, February 2013: All Set-top-box owners (2805) All Internet enabled Set-top box owners (920)

Figure 2.17

Type of audio-visual content consumed, by device users

Regularly (monthly) access type of audio visual content (%)

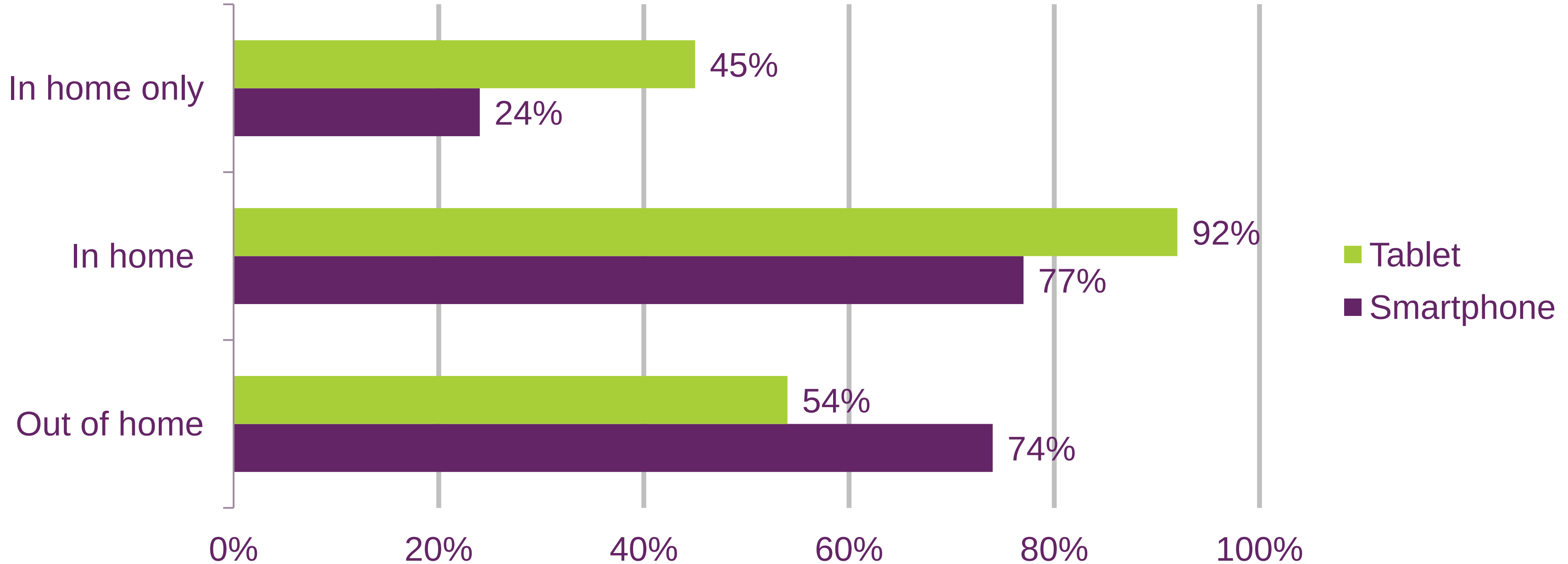


Source: Ofcom Consumer Segmentation Survey Feb 2013. Base: All who use the specific device

Figure 2.18

Location of viewing on tablets and smartphones

Viewing by location %

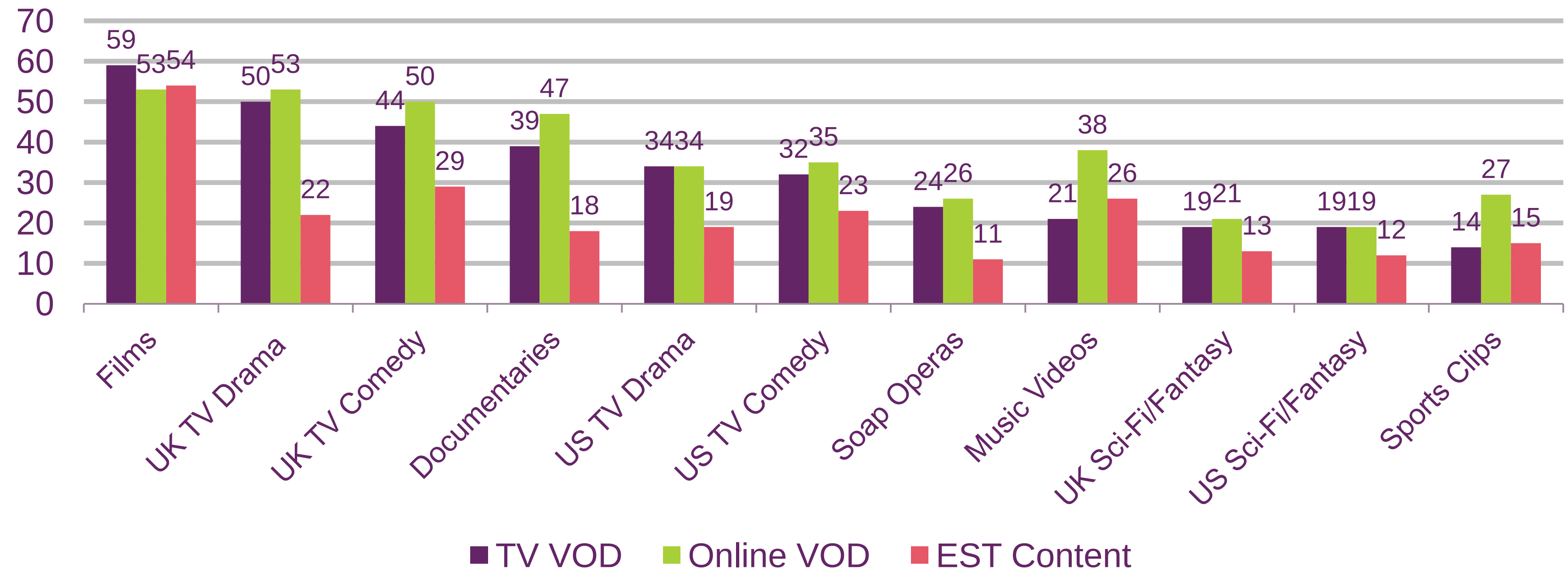


Source: Ofcom Online Survey 2013, Q: Where do you watch these types of content on your smartphone or tablet computer? (tablet=873, smartphone=779)

Figure 2.19

TV and and online VOD, and videos purchased online (EST*): claimed usage, by genre

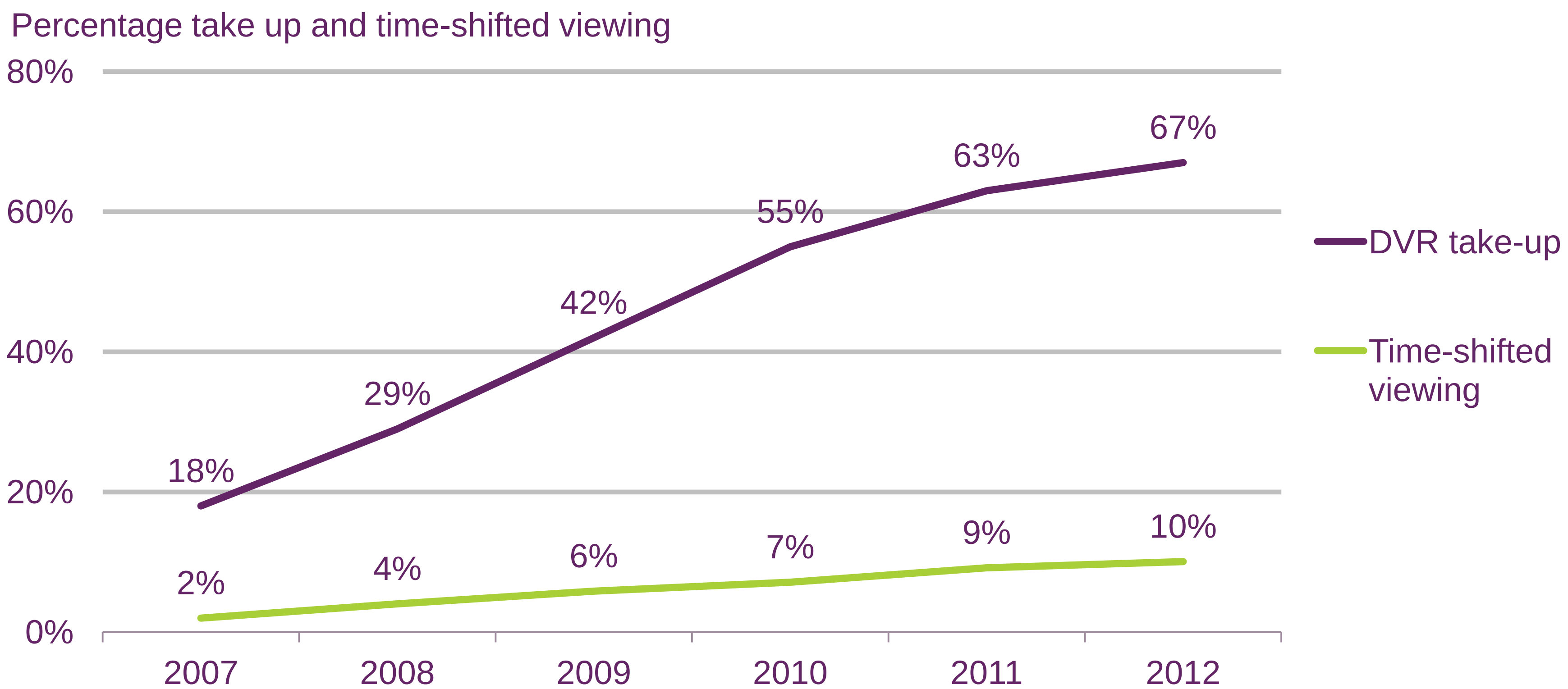
Ever accessed %



Source: Mediabug Tracker, Decipher, February 2013. *EST (Electronic Sell Through) is content that is purchased and a copy permanently kept not rented. TV VOD Base: Ever used TV VOD (891), Online VOD Base: Ever used Online VOD (2052) EST BASE: Ever Used EST services (854)

Figure 2.20

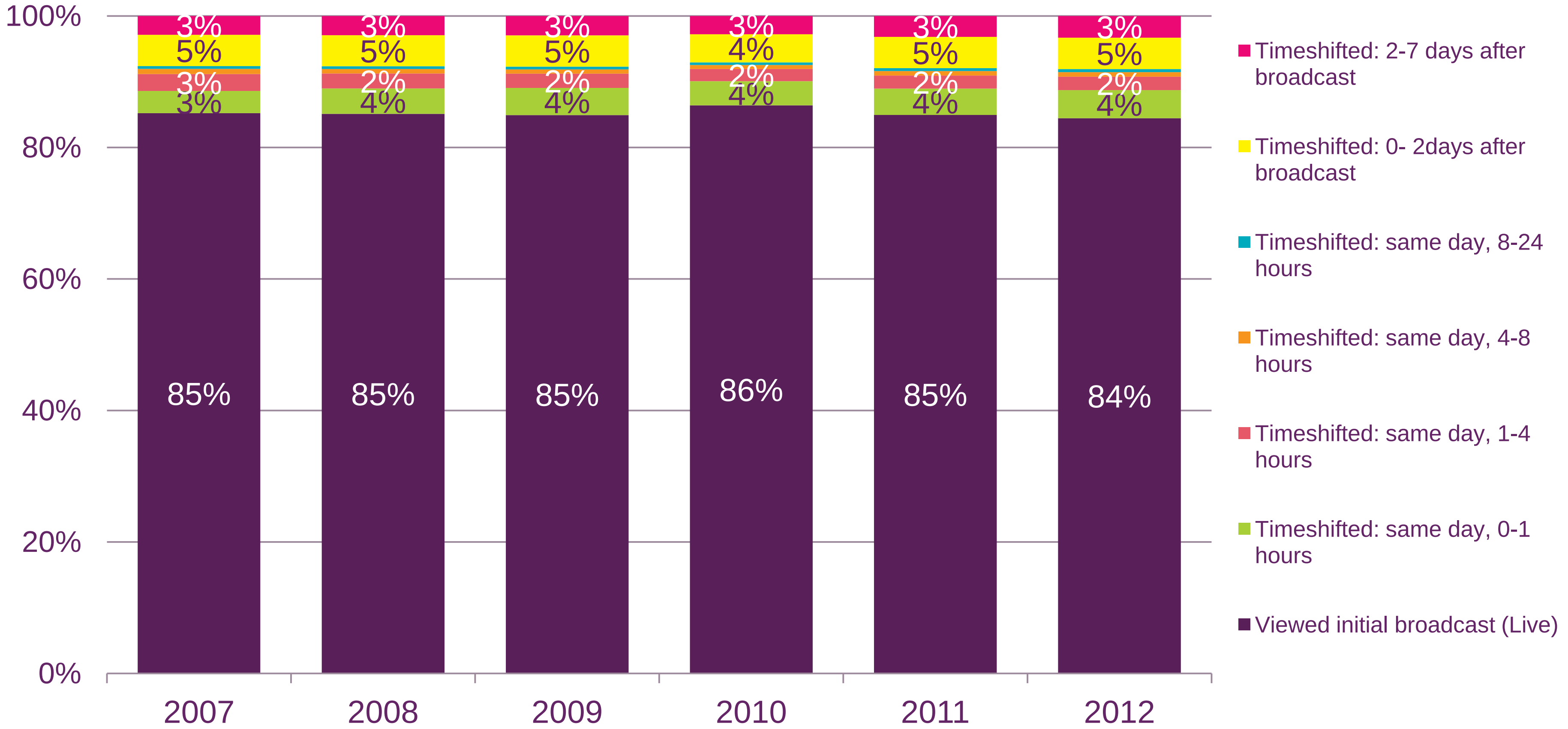
Time-shifted viewing in all homes: 2007 to 2012



Source: BARB. All individuals, Network. New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution. See definition of time-shifted viewing in section 2.1.5

Figure 2.21

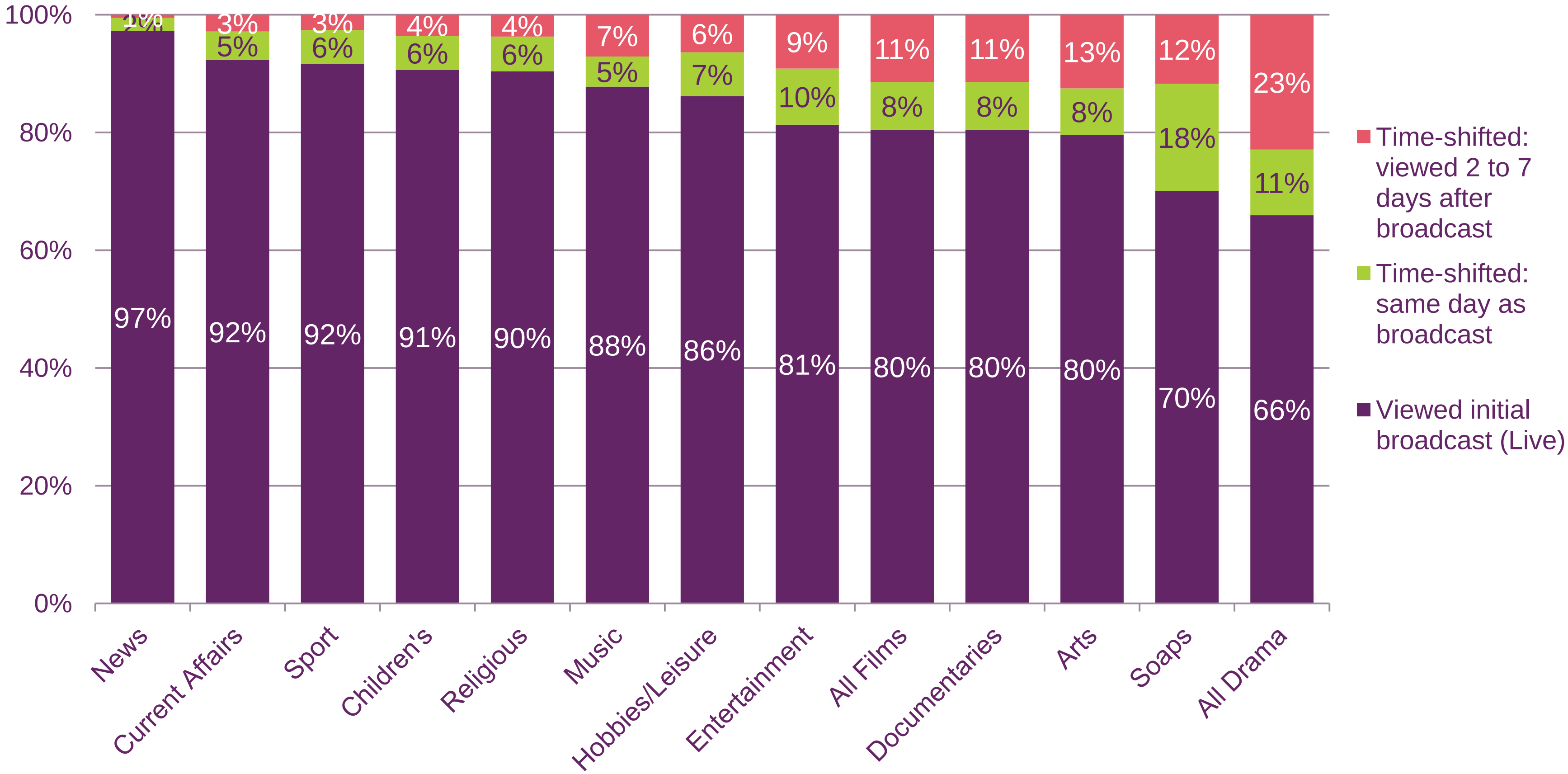
Time-shifted viewing in DVR homes: 2007-2012



Source: BARB. Individuals in DVR homes, Network.

Figure 2.22

Time-shifted viewing, all channels, by programme genre: 2012



Source: BARB, All DVR owners, Network. Genre classifications based on BARB genre definitions. Figures may not sum to 100% due to rounding differences.

Figure 2.23

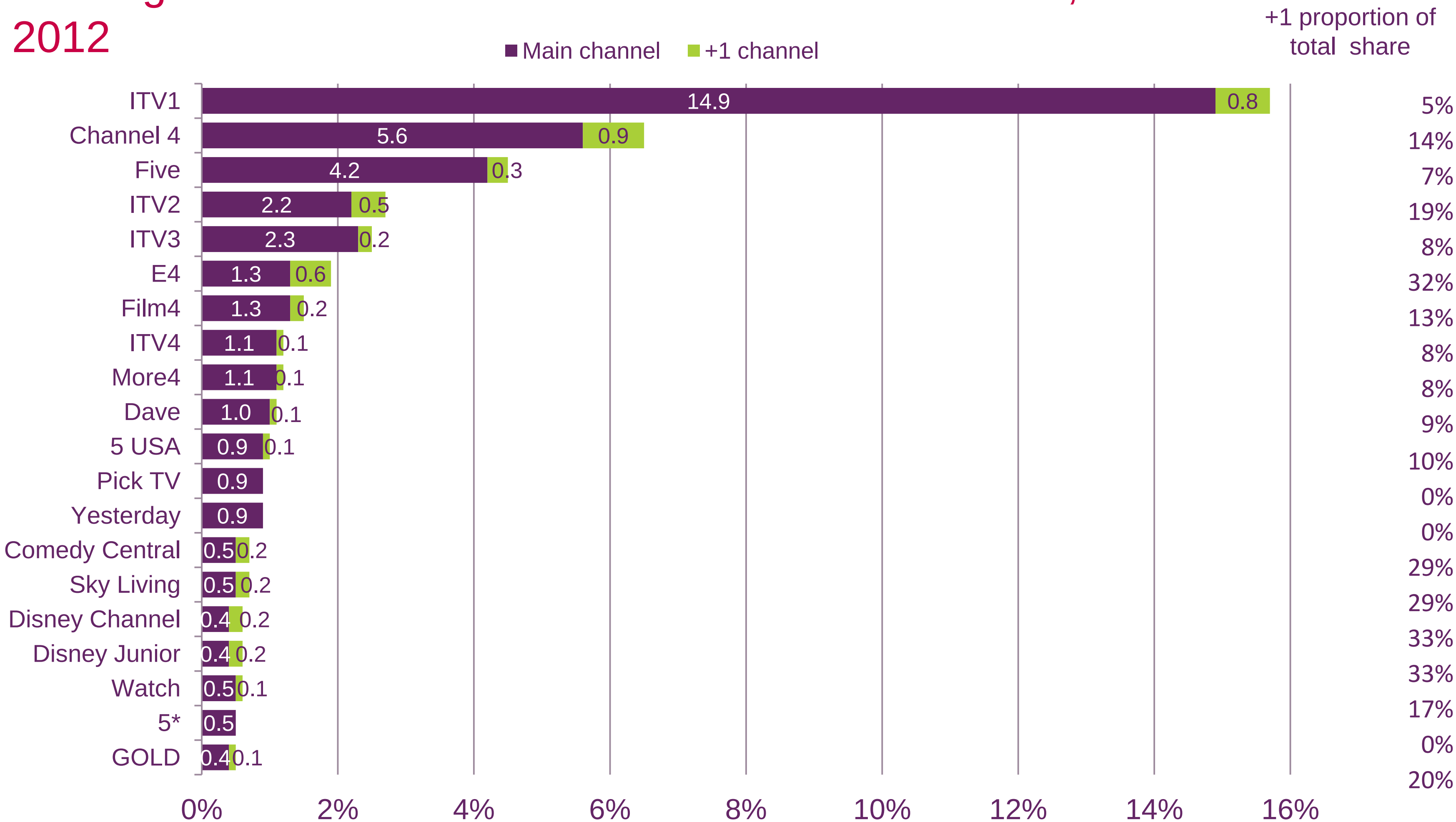
Time-shifted and live viewing of the top and bottom five of the 100 most-watched programmes in 2012

Programme	Channel	Date	Average Audience, 000s (DVR owners)	Live	Time-shifted: same day as broadcast	Time-shifted: viewed 2 to 7 days after broadcast
Top 5 programmes:						
EURO 2012: POST MATCH	BBC1	24/06/2012	8,634	**96.4%**	3.4%	0.2%
OLYMPICS 2012	BBC1	05/08/2012	9,306	**96.3%**	3.6%	0.1%
EURO 2012: ENG V ITA	BBC1	24/06/2012	13,873	**96.1%**	3.7%	0.2%
WIMBLEDON 2012	BBC1	08/07/2012	7,502	**95.9%**	3.9%	0.2%
EURO 2012: POR V SPN	BBC1	27/06/2012	6,934	**95.3%**	4.5%	0.2%
Bottom 5 programmes:						
BRITAIN'S GOT TALENT	ITV	07/04/2012	7,579	**56.5%**	26.6%	17.0%
CALL THE MIDWIFE	BBC1	25/12/2012	7,566	**52.5%**	10.7%	36.8%
SHERLOCK	BBC1	01/01/2012	7,412	**52.2%**	25.3%	22.5%
SHERLOCK	BBC1	08/01/2012	6,983	**51.8%**	22.7%	25.5%
DOCTOR WHO	BBC1	25/12/2012	7,554	**48.4%**	23.3%	28.2%

Source: BARB, All DVR owners, Network.Top 100 programmes based on average audience to programmes amongst All DVR owners. Top 100 programmes ranked by proportion of 'live' viewing.

Figure 2.24

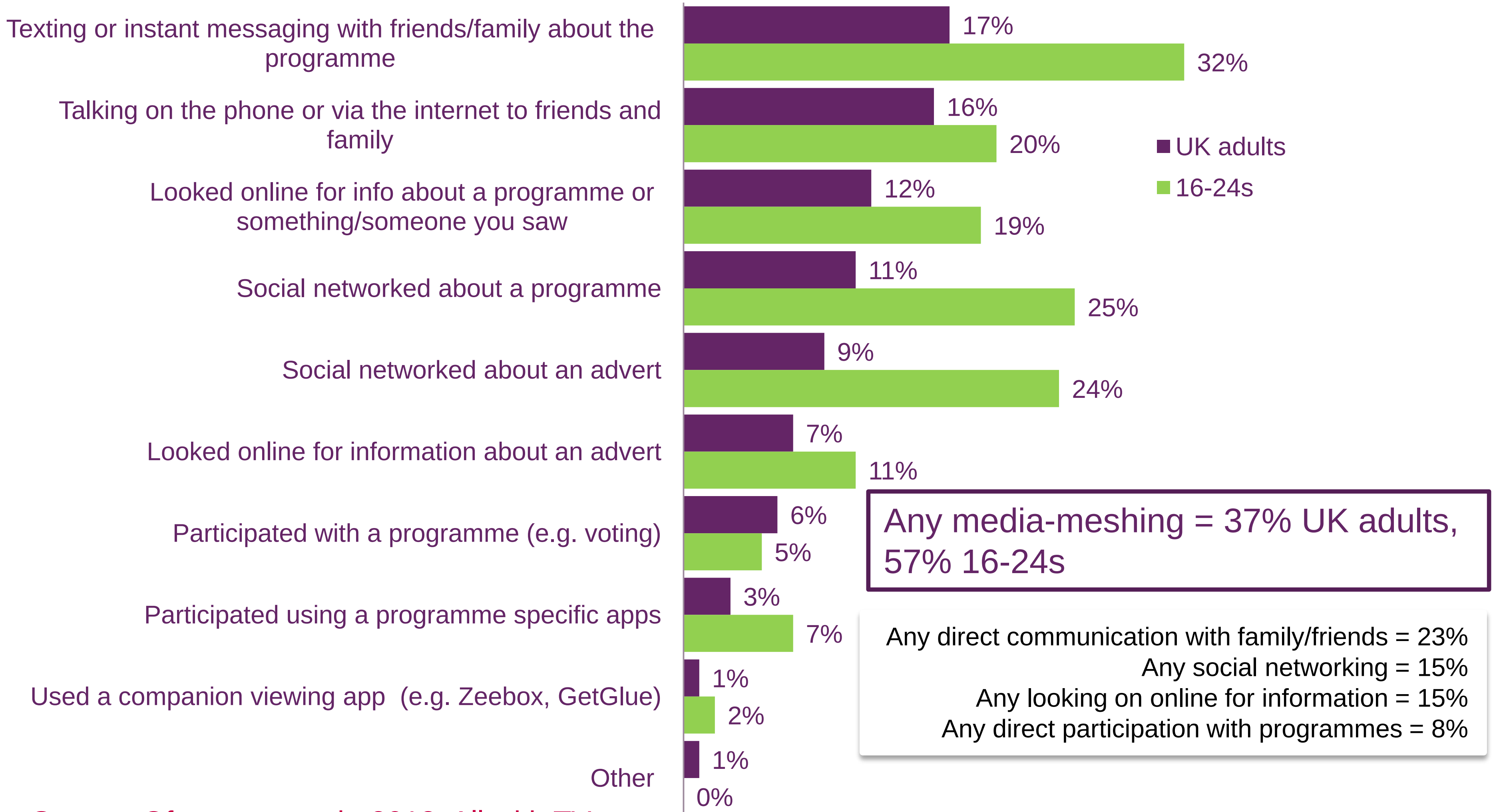
Viewing share of main channels and their +1 variants, all individuals: 2012



Source: BARB, All Individuals, Network. Based on channels with a +1 variant with a combined share (main & +1) of 0.5% or more.

Figure 2.25

Media meshing while watching television, UK adults and 16-24s



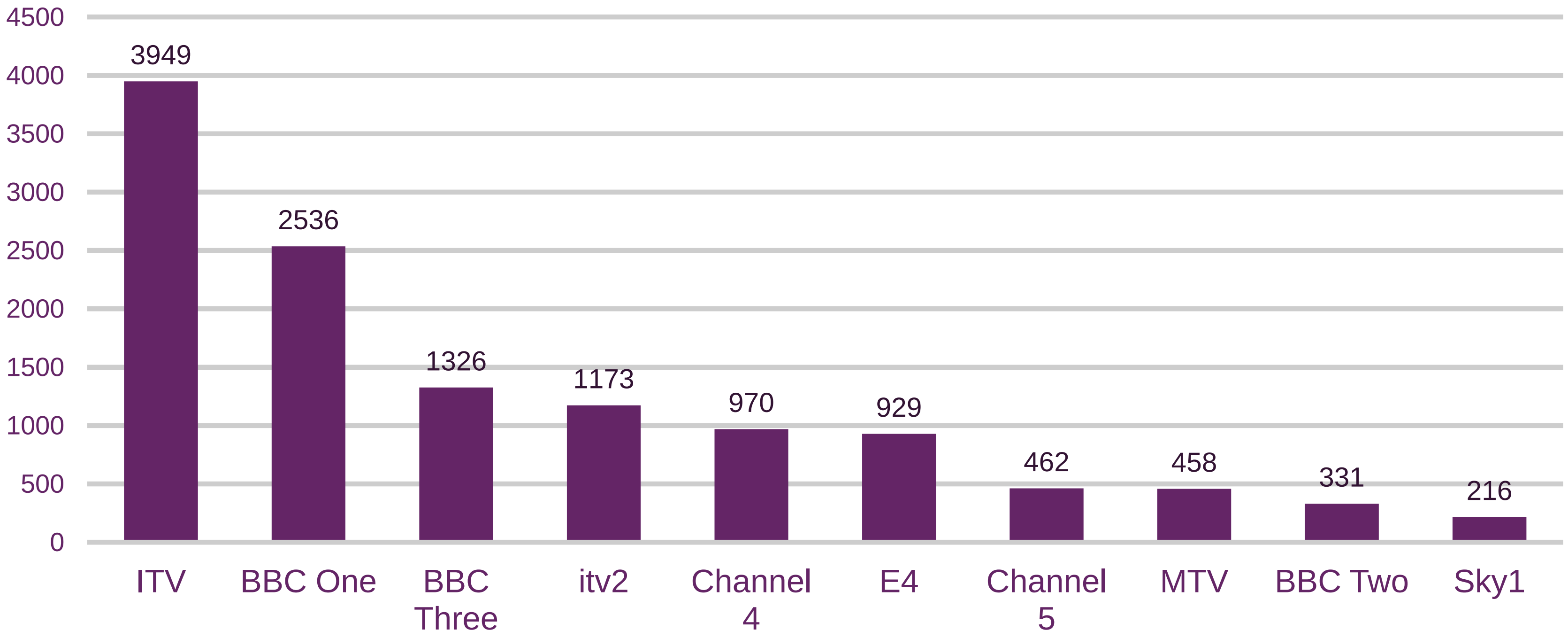
Any media-meshing = 37% UK adults, 57% 16-24s

Any direct communication with family/friends = 23%
Any social networking = 15%
Any looking on online for information = 15%
Any direct participation with programmes = 8%

Source: Ofcom research, 2013, All with TV

Figure 2.26

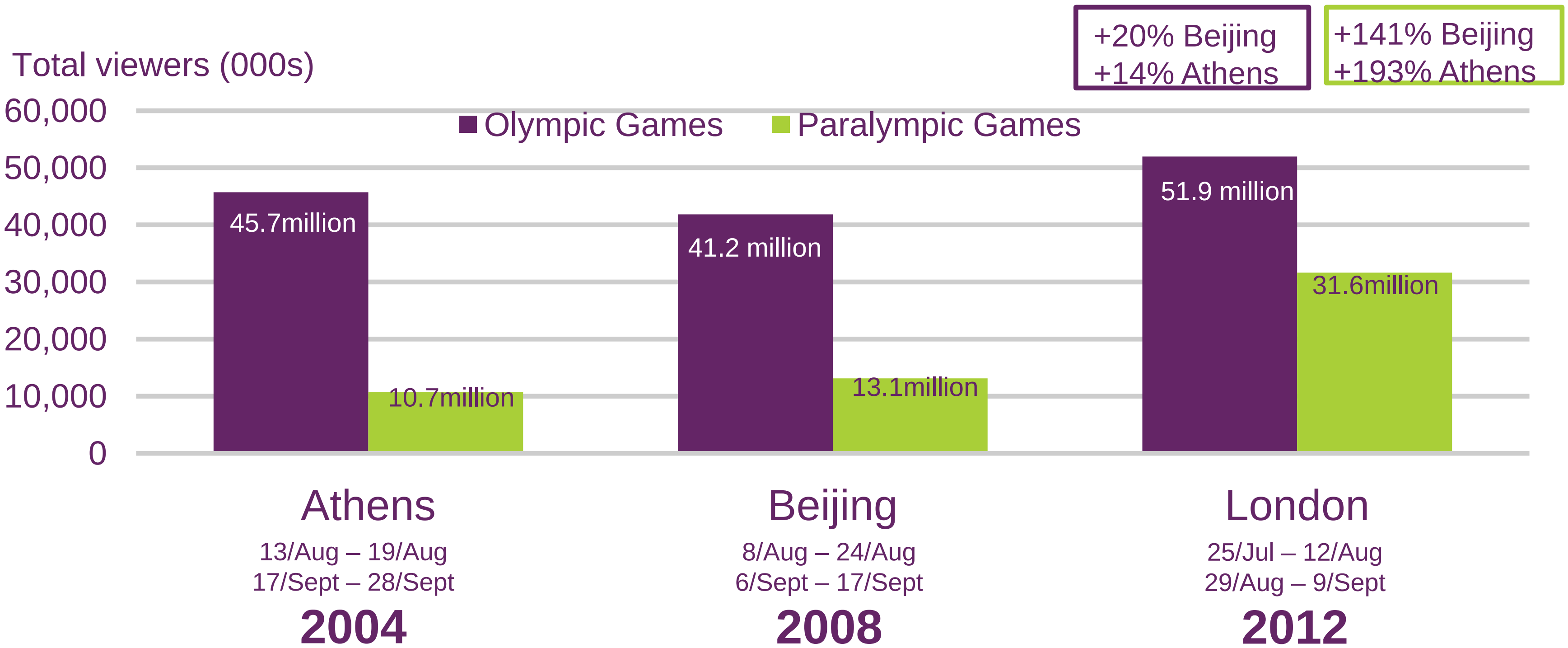
Top 10 TV channels by average volume of tweets per programme



Source: SecondSync, June 2012 to May 2013. Excludes tweets about news and sports events.

Figure 2.27

Total viewers of Olympic and Paralympic Games: 2004 - 2012



Source: BARB/InfoSys+. Note: 15 minutes+ consecutive reach. Individuals 4+. The London 2012 Paralympics was broadcast on C4/More4/4seven (C4 Paralympics channels did not report programme data and have therefore been excluded from the overall total reach), while 2008/2004 was broadcast on BBC One and BBC Two. According to Kantar Media, an estimated 3.53 million watched Paralympic footage on three additional Paralympics channels.

Figure 2.28

Top ten most watched programmes : 2012

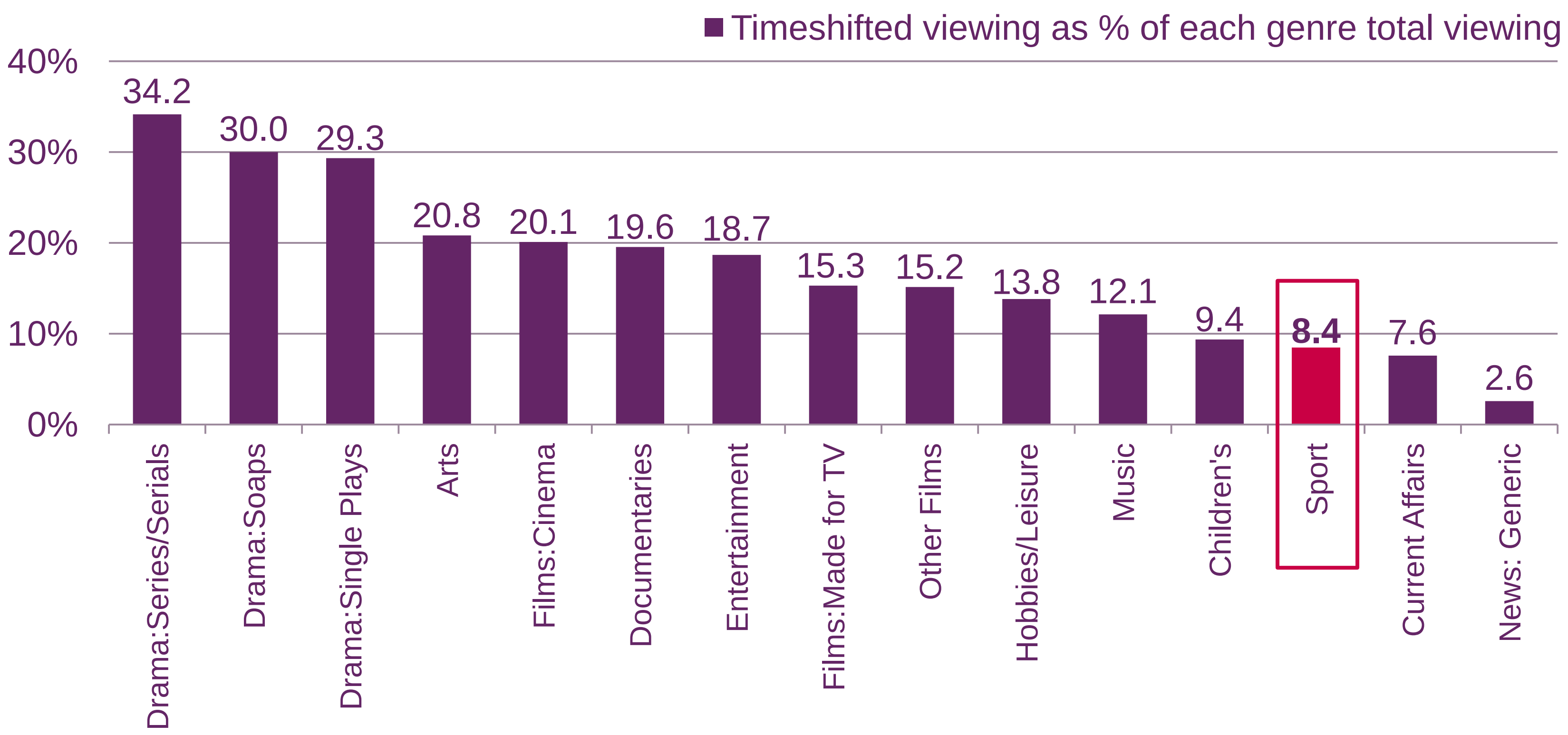
	Programme title	Channel	Genre	Date	Viewing audience (millions of individuals)
1	**OLYMPICS 2012: CLOSING CEREMONY**	**BBC1**	**Sport**	12/08/2012	**24.5**
2	**OLYMPICS 2012: OPENING CEREMONY**	**BBC1**	**Sport**	27/07/2012	**24.2**
3	**EURO 2012: ENG V ITA**	**BBC1**	**Sport**	24/06/2012	**20.3**
4	**OLYMPICS 2012: MEN'S 100M FINAL**	**BBC1**	**Sport**	05/08/2012	**17.3**
5	**UEFA EURO 2012 MATCH ENG V UKR**	**ITV**	**Sport**	19/06/2012	**16.2**
6	THE DIAMOND JUBILEE CONCERT	BBC1	Music	04/06/2012	15.3
7	**EURO 2012: SWE V ENG**	**BBC1**	**Sport**	15/06/2012	**14.3**
8	**OLYMPICS 2012: ATHLETICS (incl. MEN'S 100M SEMI-FINALS)**	**BBC1**	**Sport**	05/08/2012	**13.6**
9	STRICTLY COME DANCING: FINAL	BBC1	Entertainment	22/12/2012	13.4
10	STRICTLY COME DANCING: FINAL: THE RESULTS	BBC1	Entertainment	22/12/2012	13.4
11	**EURO 2012: POST MATCH**	**BBC1**	**Sport**	24/06/2012	**12.7**
12	BRITAIN'S GOT TALENT: FINAL	ITV	Entertainment	12/05/2012	12.6
13	**UEFA EURO 2012 MATCH FRA V ENG**	**ITV**	**Sport**	11/06/2012	**12.6**
14	**OLYMPICS 2012: CLOSING CEREMONY COUNTDOWN**	**BBC1**	**Sport**	12/08/2012	**12.5**
15	**EURO 2012: SPN V ITA**	**BBC1**	**Sport**	01/07/2012	**12.4**

Source: BARB/InfoSys+. Note: Individuals 4+. The top programmes are the best performing episodes of a programme during the year.

Figure 2.29

Proportion of time-shifted viewing, by programme genre: 2012

Percentage of viewing (%)



Source: BARB/InfoSys+. Note: DVR Individuals 4+. Based on total minutes of viewing to genres.

Figure 2.30

The Top ten programmes watched live on BBC iPlayer: 2012

	iPlayer live	iPlayer catch up
1	**Olympics London 2012**	**Olympics Ceremonies London 2012**
2	**Olympics Ceremonies London 2012**	Top Gear
3	**Wimbledon 2012**	Sherlock
4	**Match of the Day Euro 2012**	Dr Who
5	**Athletes Parade Live**	The Apprentice
6	**BBC Sports Personality of the Year**	Citizen Khan
7	The Diamond Jubilee Concert	The Voice UK
8	Eurovision Song Contest 2012	Bad Education
9	Breakfast BBC News Channel	Waterloo Road
10	**Formula1 2012**	Eastenders

Source: TV Licensing TeleScope 2013 (http://www.tvlicensing.co.uk/about/media-centre/news/tv-licensing-reveals-tv-elation-across-the-nation-NEWS65/?WT.ac=home_pop_tele2013)

Figure 2.31

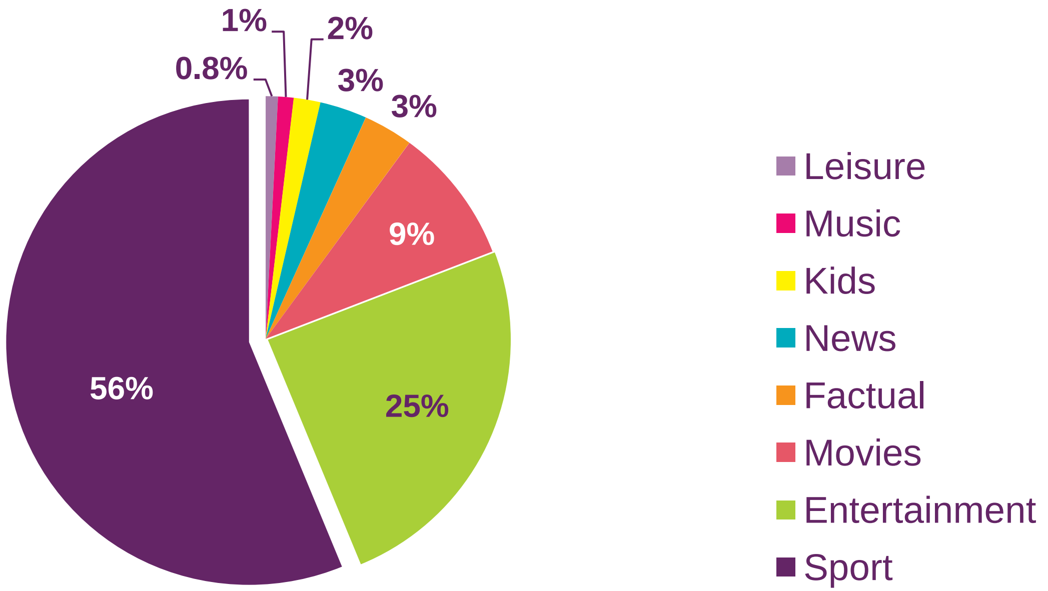
PSB and multichannel spend on sports programming: 2006 - 2012

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

Figure 2.32

Multichannel spend on programmes by genre: 2012

Spend as a percentage of total (%)



Total: £2,713m

Source: Ofcom/broadcasters

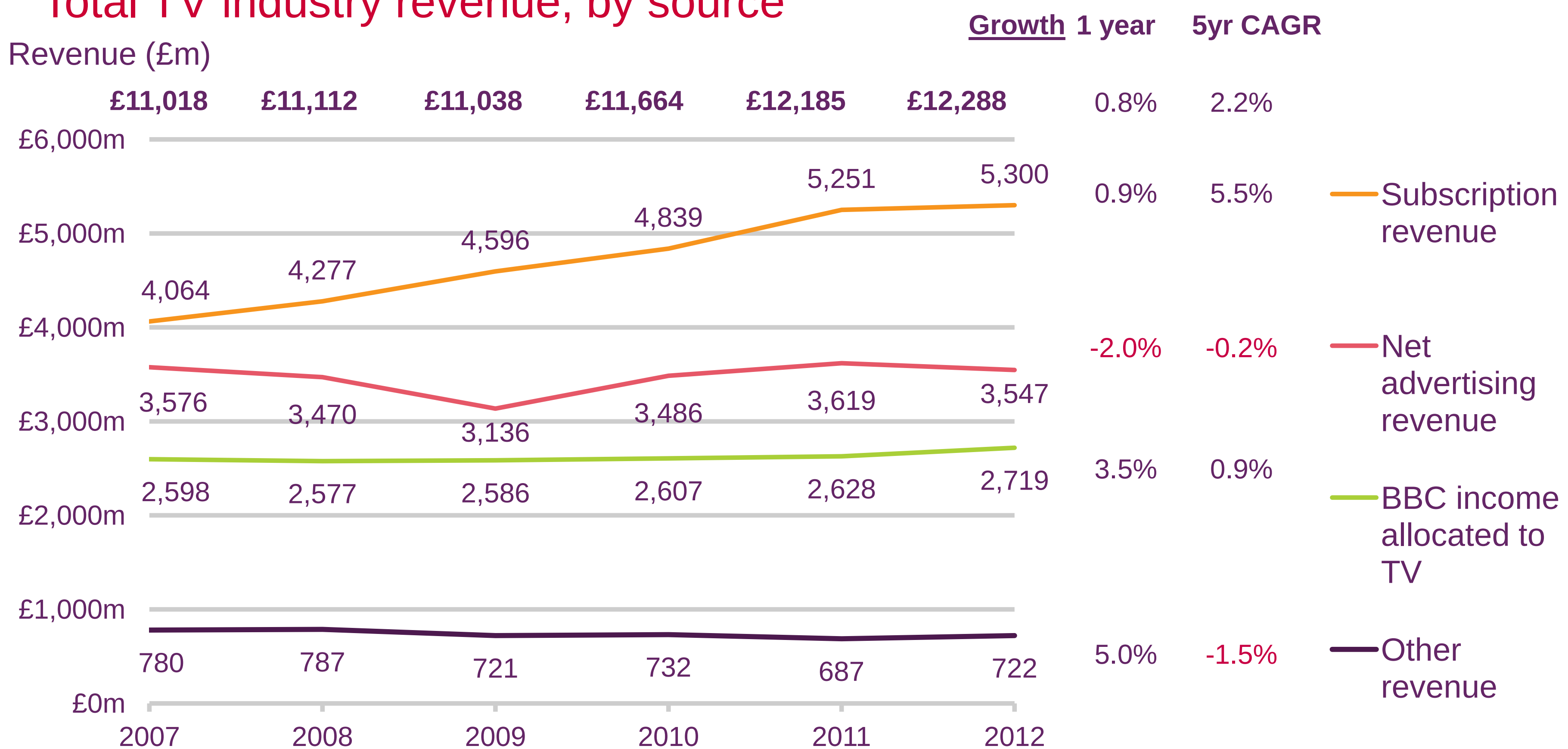
Figure 2.33

PSB and multichannel sports output: 2007 - 2012

Source: Ofcom/broadcasters

Figure 2.34

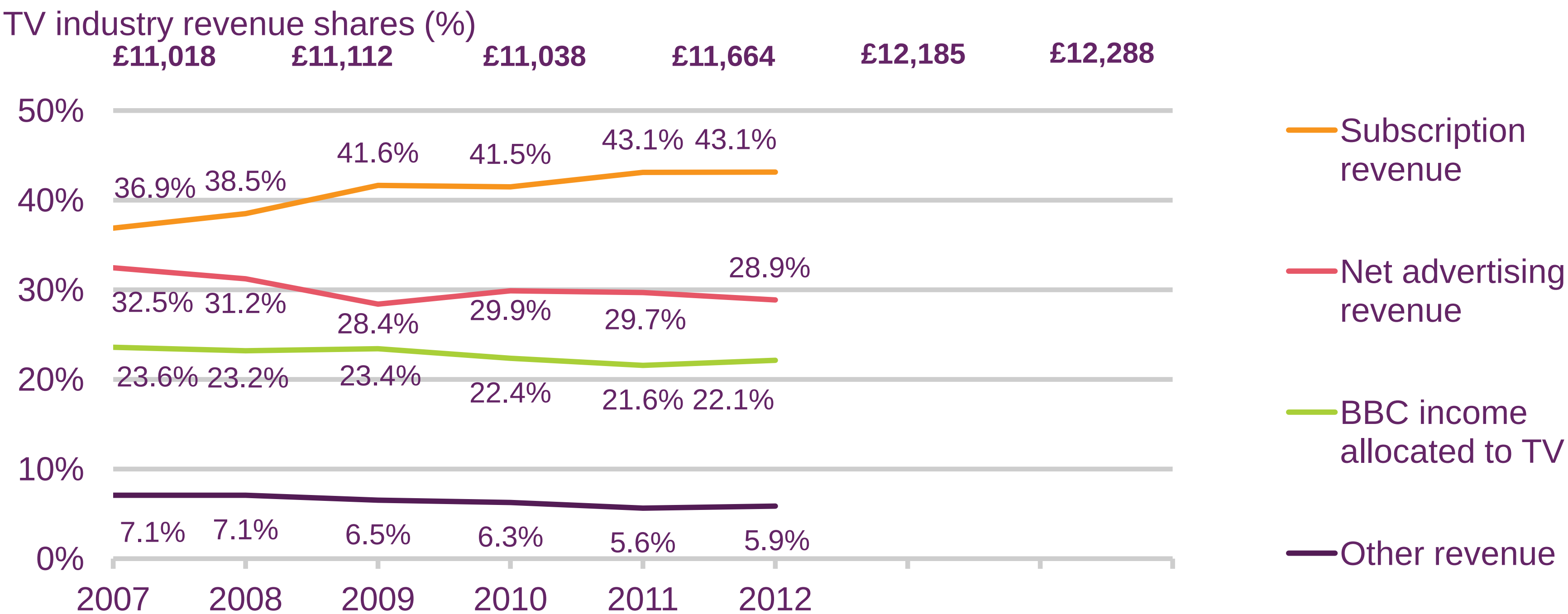
Total TV industry revenue, by source



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, sponsorship, interactive (including premium-rate telephony services), programme sales and S4C’s grant from the DCMS. The BBC re-stated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

Figure 2.35

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 re-stated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

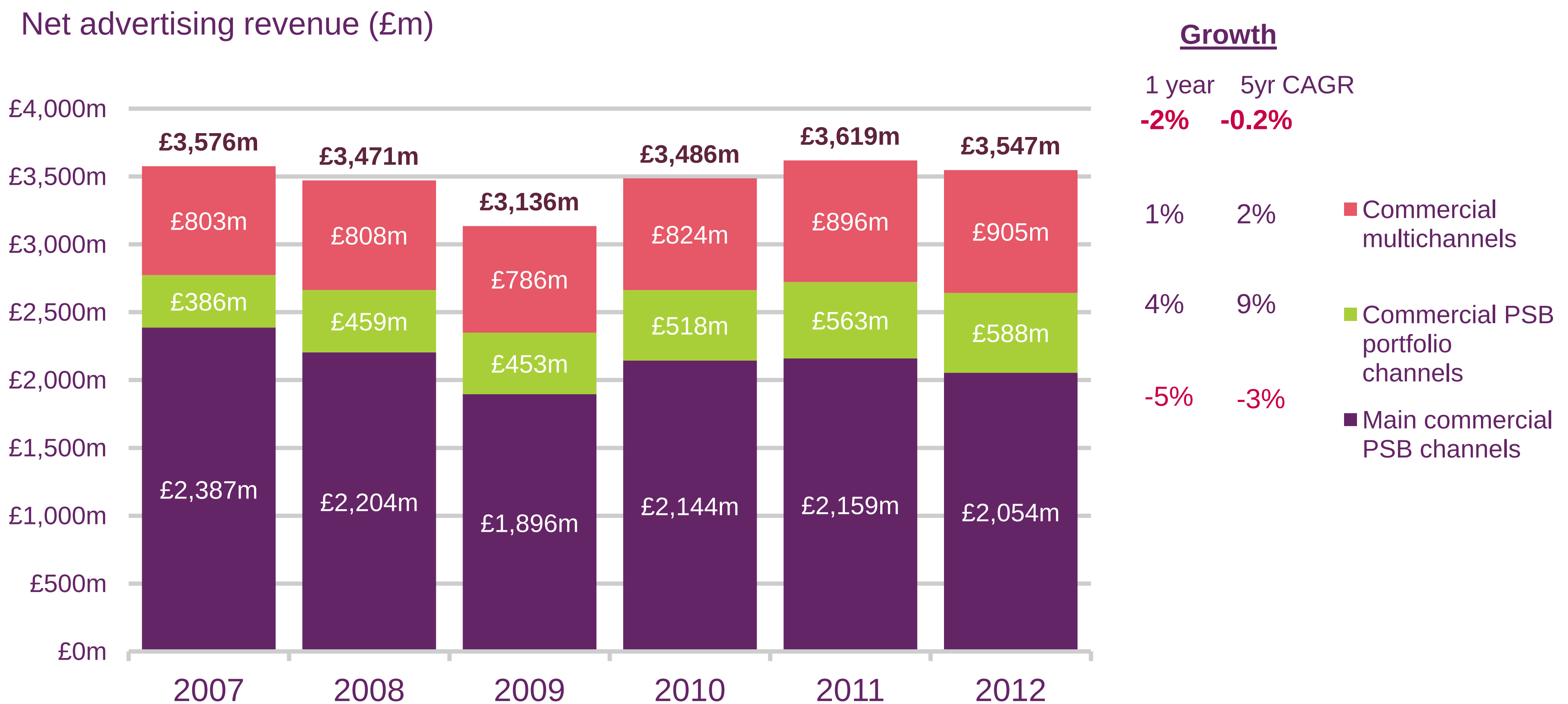
Figure 2.36

Total TV industry revenue by sector: 2007 - 2012

Source: Ofcom/broadcasters. Note: Figures are nominal. Main commercial PSB channels comprise ITV/ITV Breakfast, STV, UTV, Channel Television, Channel 4, Channel 5 and S4C. Commercial multichannels comprise all multichannels including those owned by ITV1, Channel 4 and Channel 5. 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 re-stated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

Figure 2.37

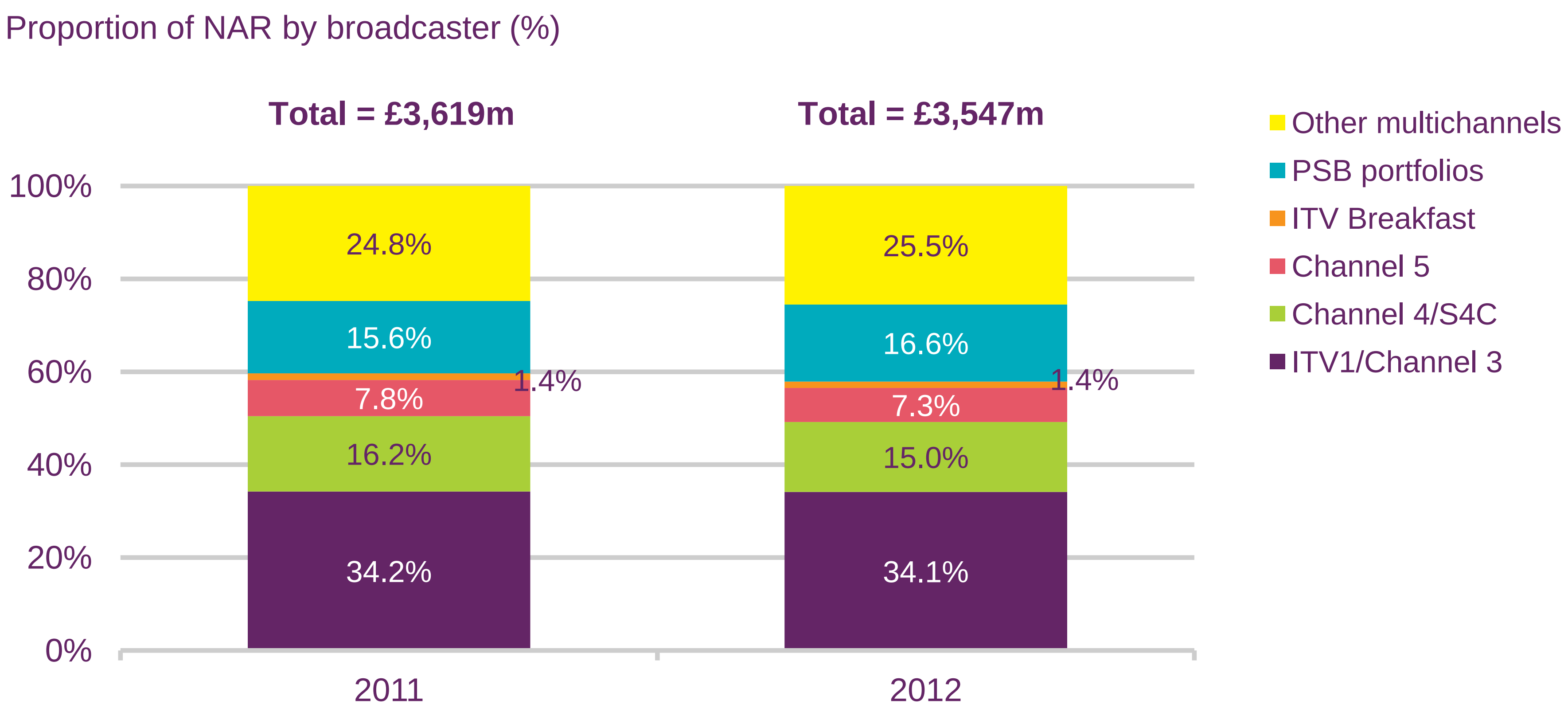
TV net advertising revenues, by source: 2007 - 2012



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, ITV Breakfast, Channel 4, Channel 5 and S4C; Commercial PSB portfolio channels include, where relevant, ITV2, 3, 4, CiTV, E4, More 4, Film 4, Five USA and 5* (and their '+1' channels). For previous years closed channels have also been included. Sponsorship revenue not included. Totals may not equal the sum of the components due to rounding.

Figure 2.38

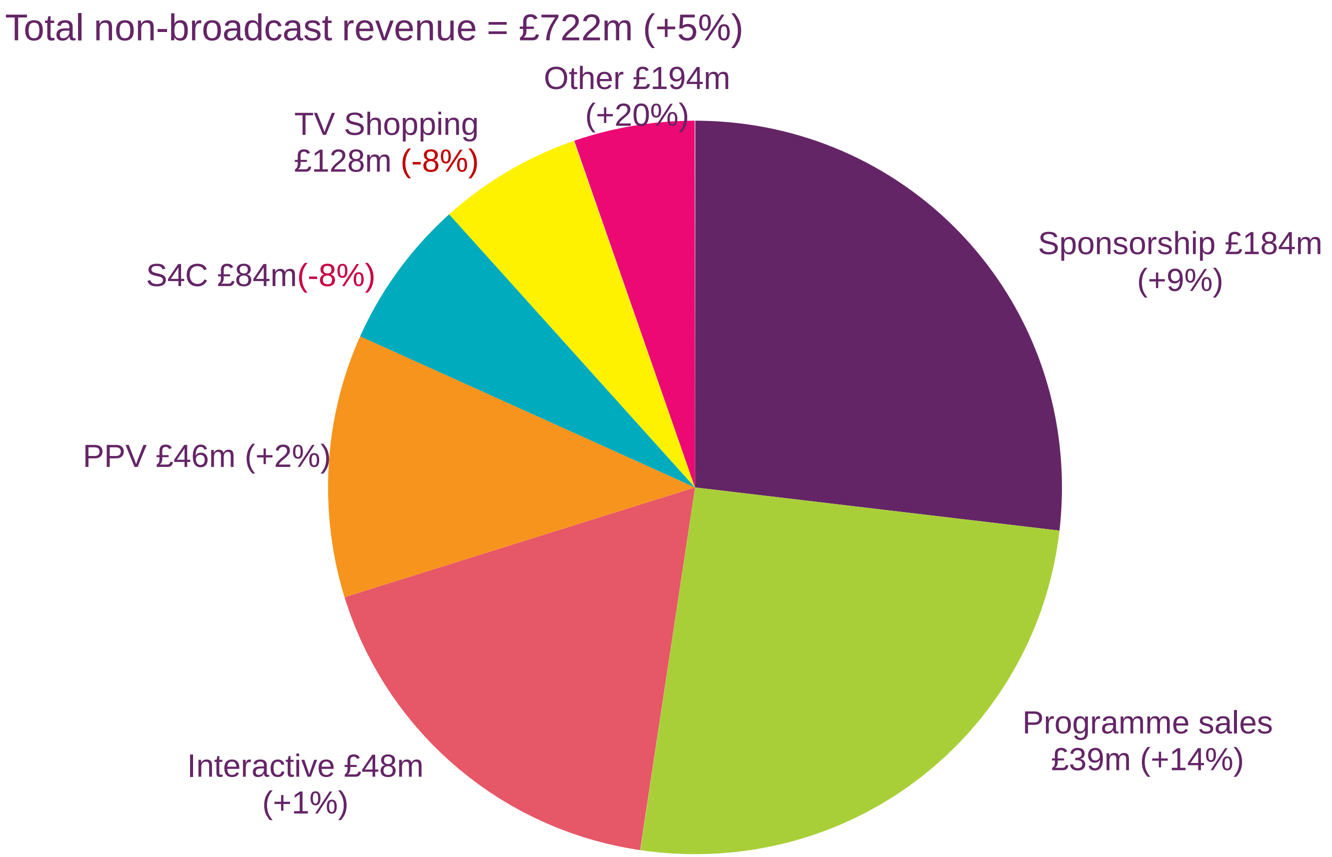
TV net advertising revenue market shares: 2011 - 2012



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

Figure 2.39

Breakdown of other / non-broadcast revenue: 2012

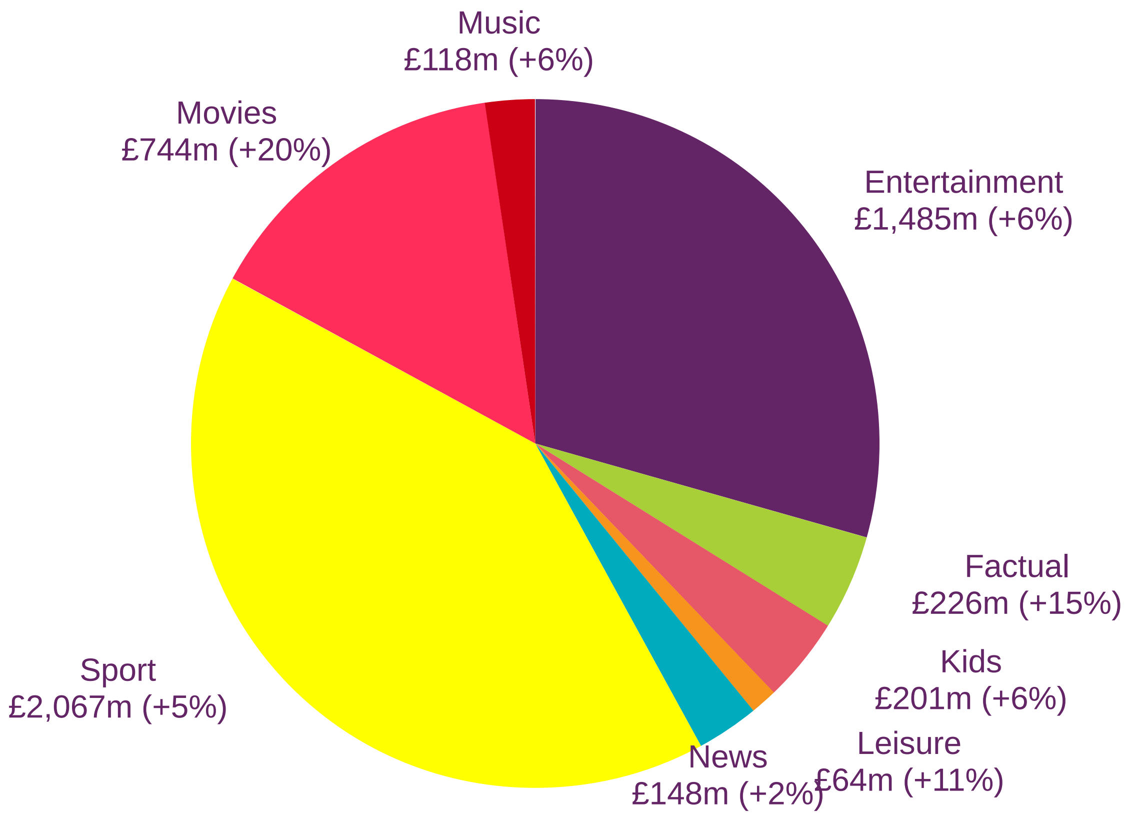


Source: Ofcom/broadcasters. Note: Percentage figures in brackets represent year-on-year change for total non-broadcast revenue versus 2011. TV shopping represents aggregate operating margin of products sold via television. Totals may not equal the sum of the components due to rounding. Owing to the nature of these revenue components, annual changes may be a function of a higher number of broadcaster returns being made by the time of writing, rather than material changes in the contributions that these revenue components are making to total industry income

Figure 2.40

Revenue generated by multichannel broadcasters, by genre: 2012

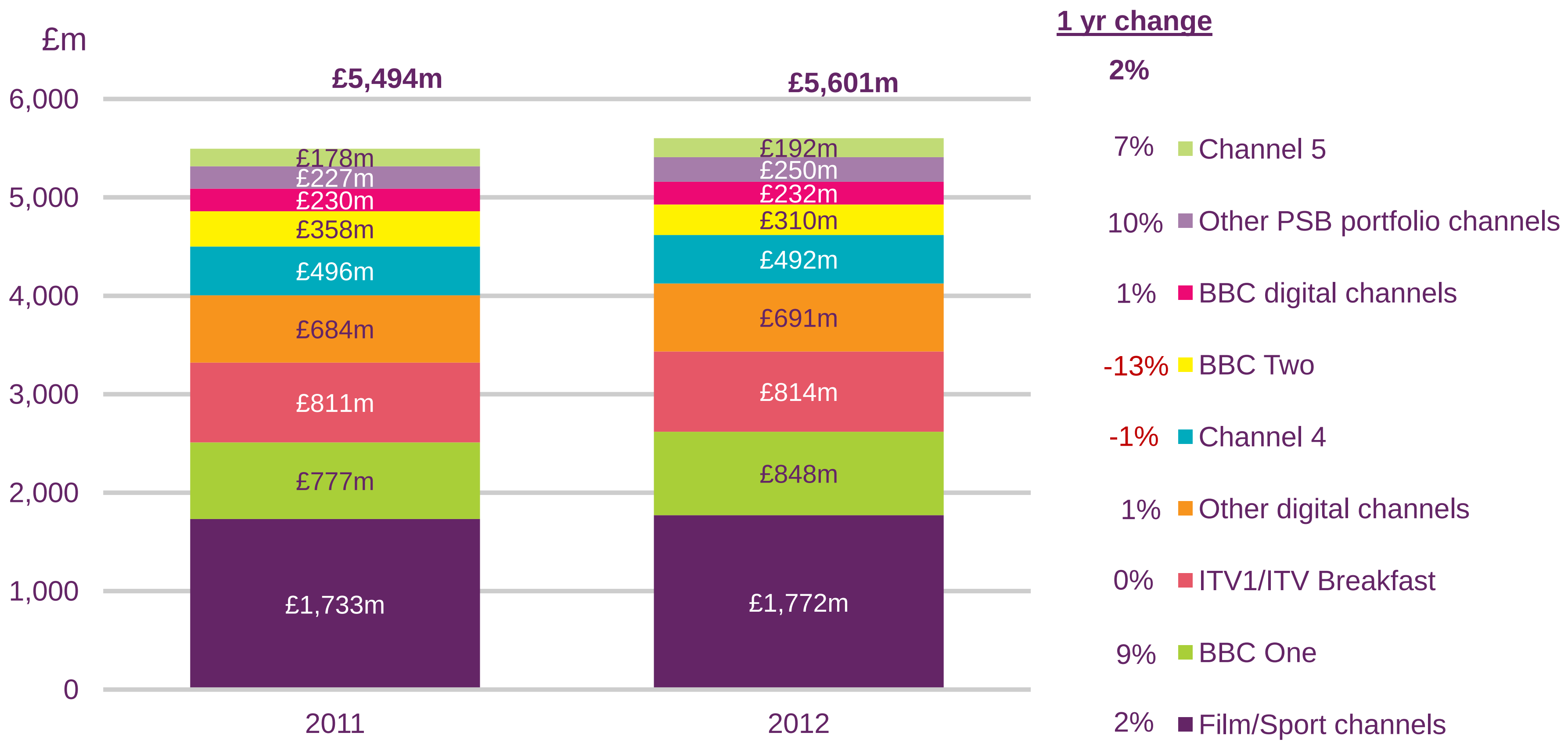
Total revenue = £5,053m across the eight included genres (+8%)



Source: Ofcom/broadcasters. Note: Percentage figures in brackets represent year-on-year change for total revenue compared to 2011. The figures in this chart include all sources of revenue accruing to multichannels and are expressed in nominal terms. This includes those set out in Figure 2.22 plus wholesale subscriber payments from platform operators.

Figure 2.41

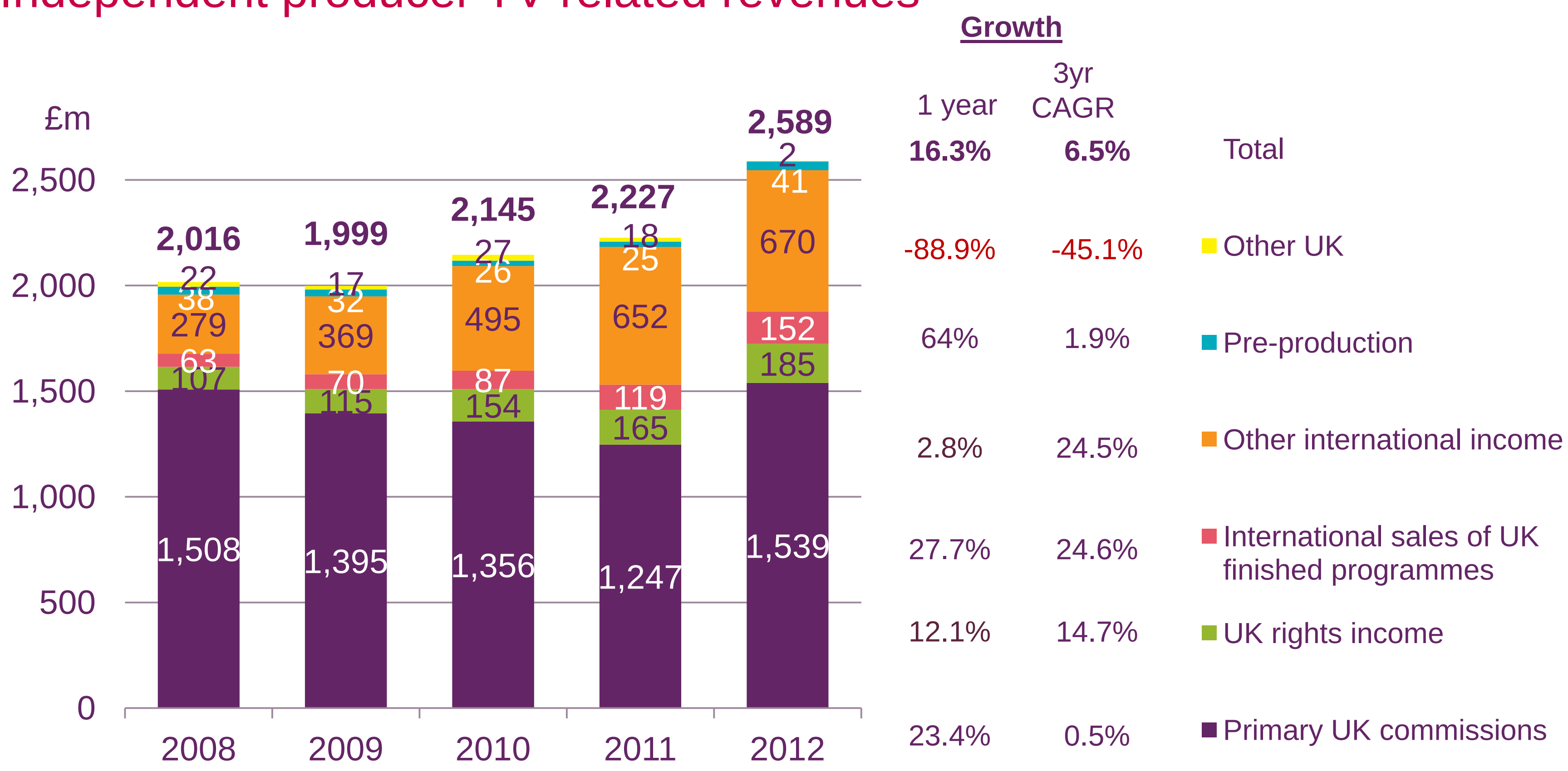
Spend on network TV programmes: 2011 - 2012



Source: Ofcom/broadcasters. Note: Figures expressed in nominal prices. 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 first-run acquired programmes, spend on rights and on repeats (originations or acquisitions).

Figure 2.42

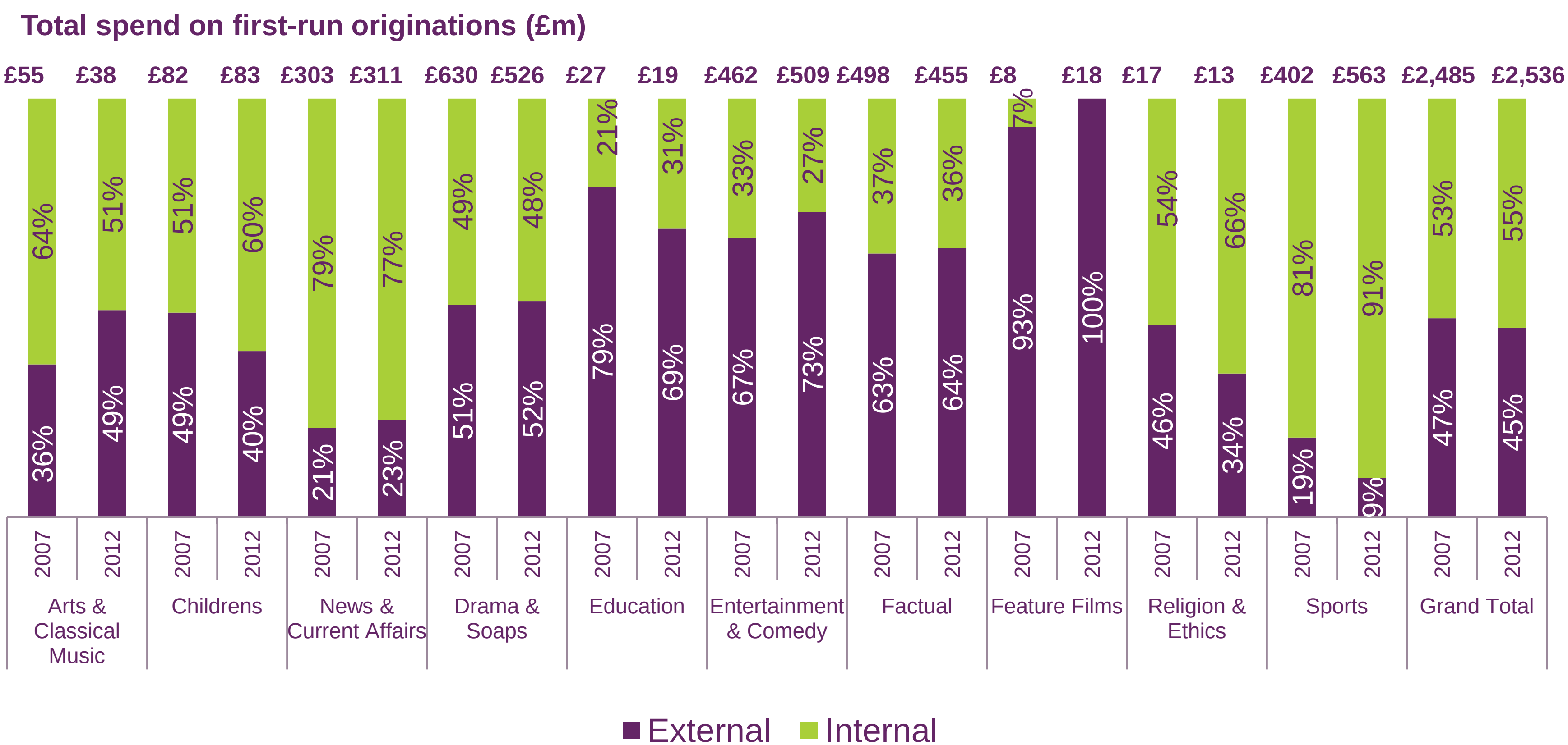
Independent producer TV-related revenues



Source: PACT Independent Production Sector Financial Census and Survey 2013. Note: 'Other international income' refers to revenue from companies overseas operations and any primary commissions received from non-UK broadcasters; 'International sales of UK finished programmes' – sales of first-run UK programming sold as finished product abroad ; 'UK rights income' – UK secondary sales, publishing, formats, DVD sales etc.

Figure 2.43

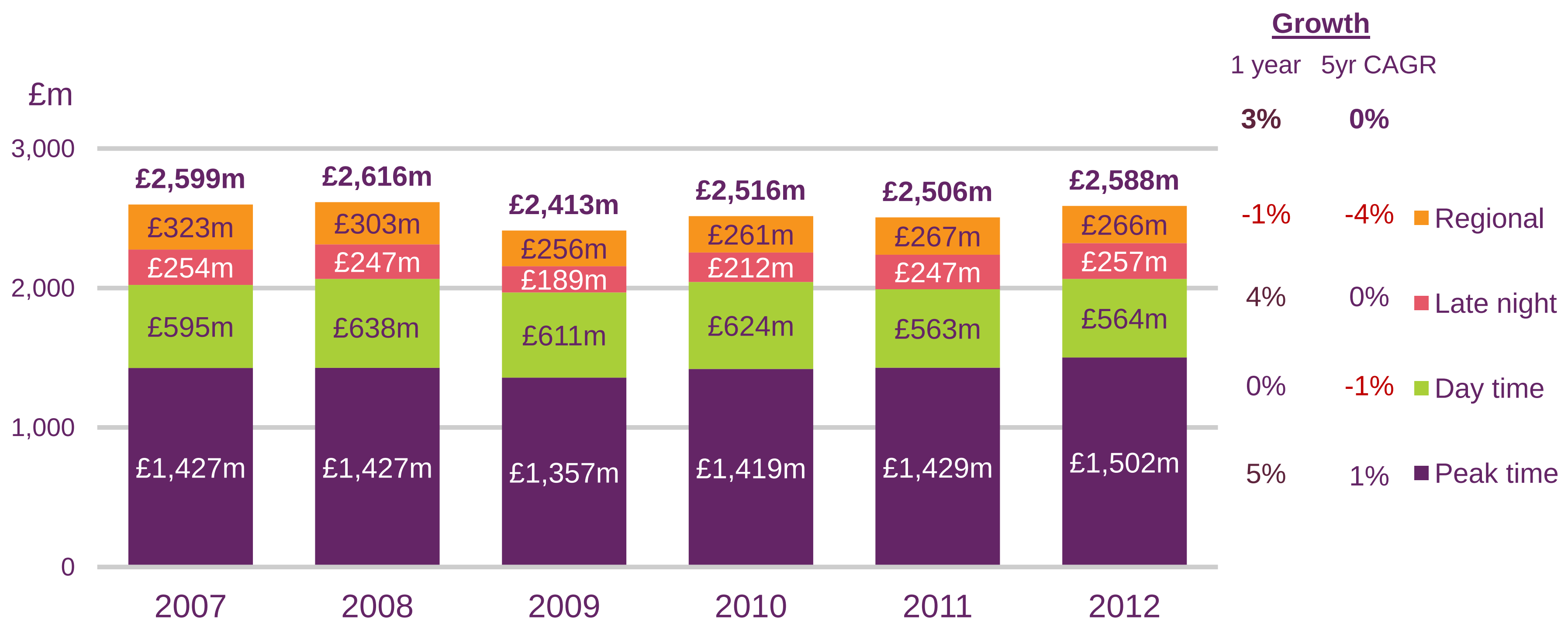
Relative share of spend on first-run originated content by genre: in-house vs. independent producers: 2007 and 2012



Source: Ofcom/broadcasters. Note: Includes spend by the five main PSBs and BBC portfolio channels on first-run originated content broadcast all day, and excludes regional output.

Figure 2.44

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



Source: Ofcom/broadcasters. Note: Figures are expressed in nominal terms. They include ITV Breakfast, spending in the nations and regions on English-language programming (and a small amount of Irish-language programmes) but do not include the BBC's digital channels

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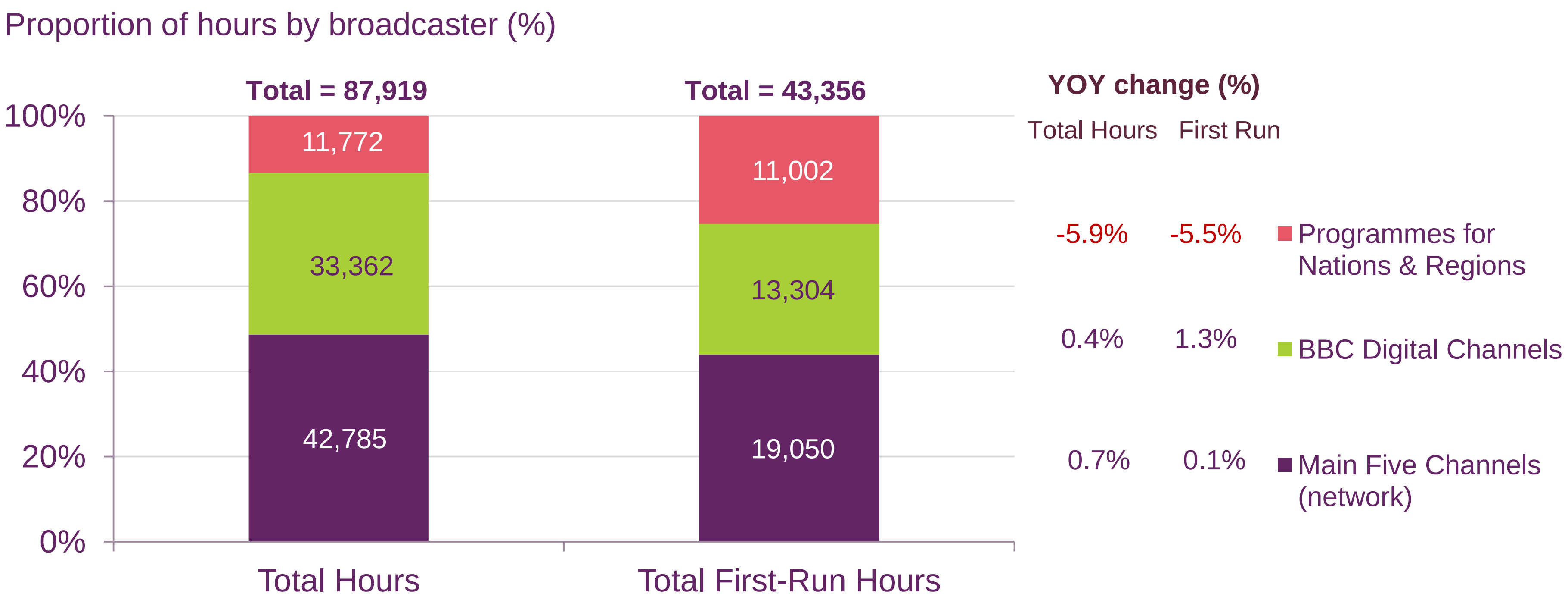
Figure 2.45

Total and first-run originated hours of output, all day: 2012



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. ITV Breakfast is included within the figures for the five main channels. Regional hours exclude Welsh and Gaelic-language programming but include a small proportion of Irish-language programmes.

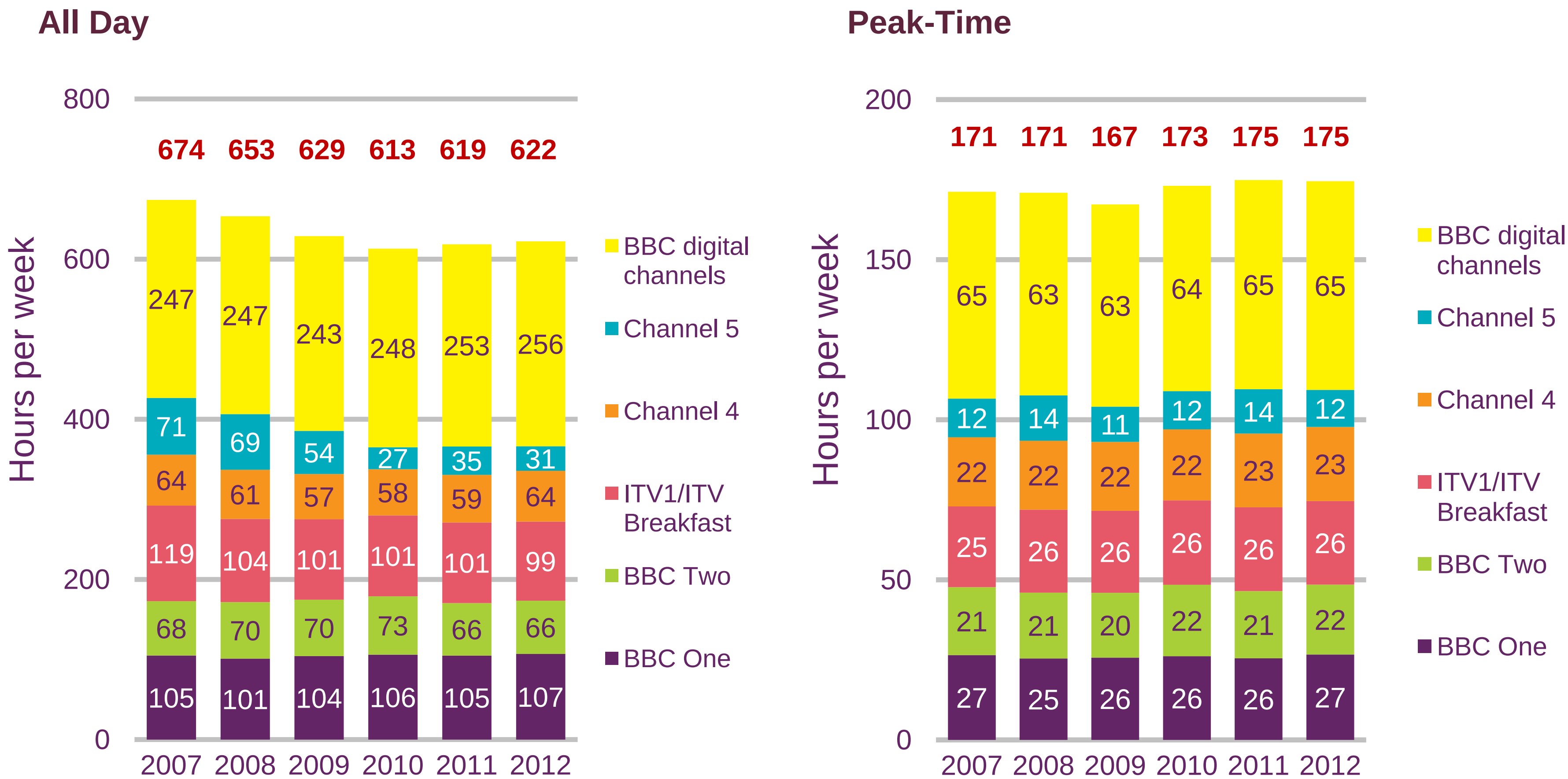
Figure 2.46

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

Source: Ofcom/broadcasters. Note: Figures include ITV Breakfast 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 2.47

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

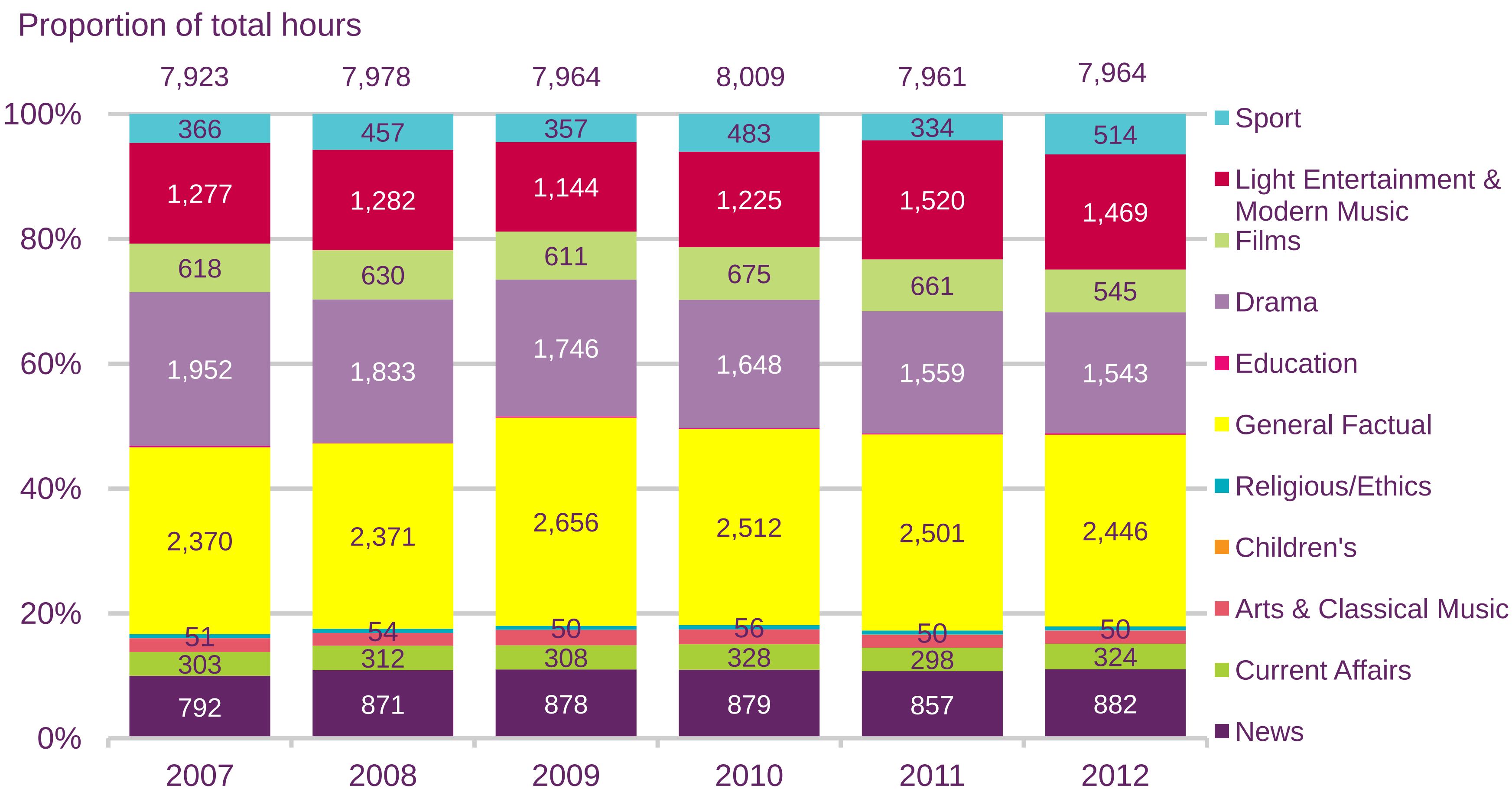


Source: Ofcom/broadcasters.

Note: Figures do not include spend on nations and regions output.

Figure 2.48

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

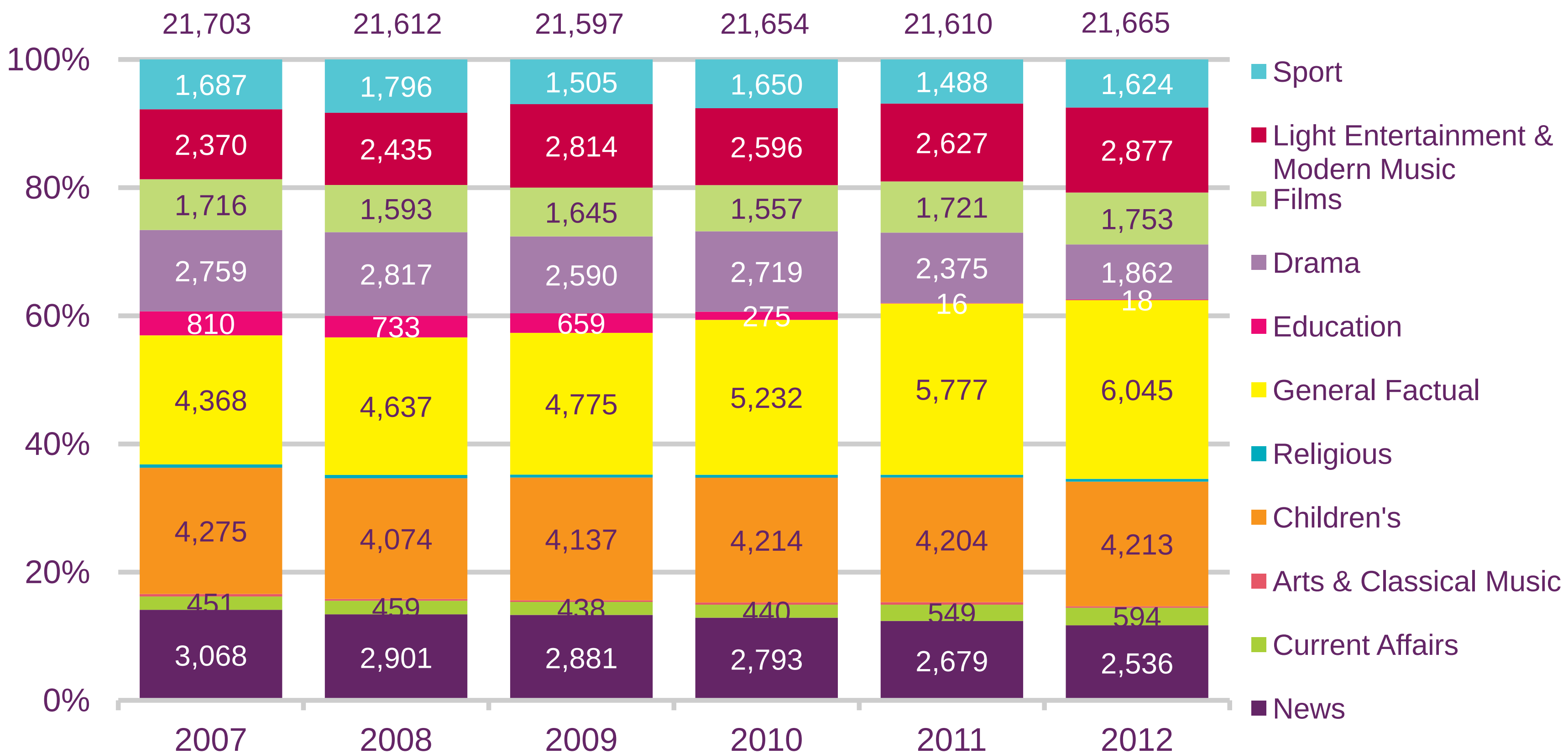


Source: Ofcom/broadcasters. Note: Includes five main channels including ITV Breakfast, figures do not include hours of nations and regions output.

Figure 2.49

Genre mix on five main PSB channels: daytime

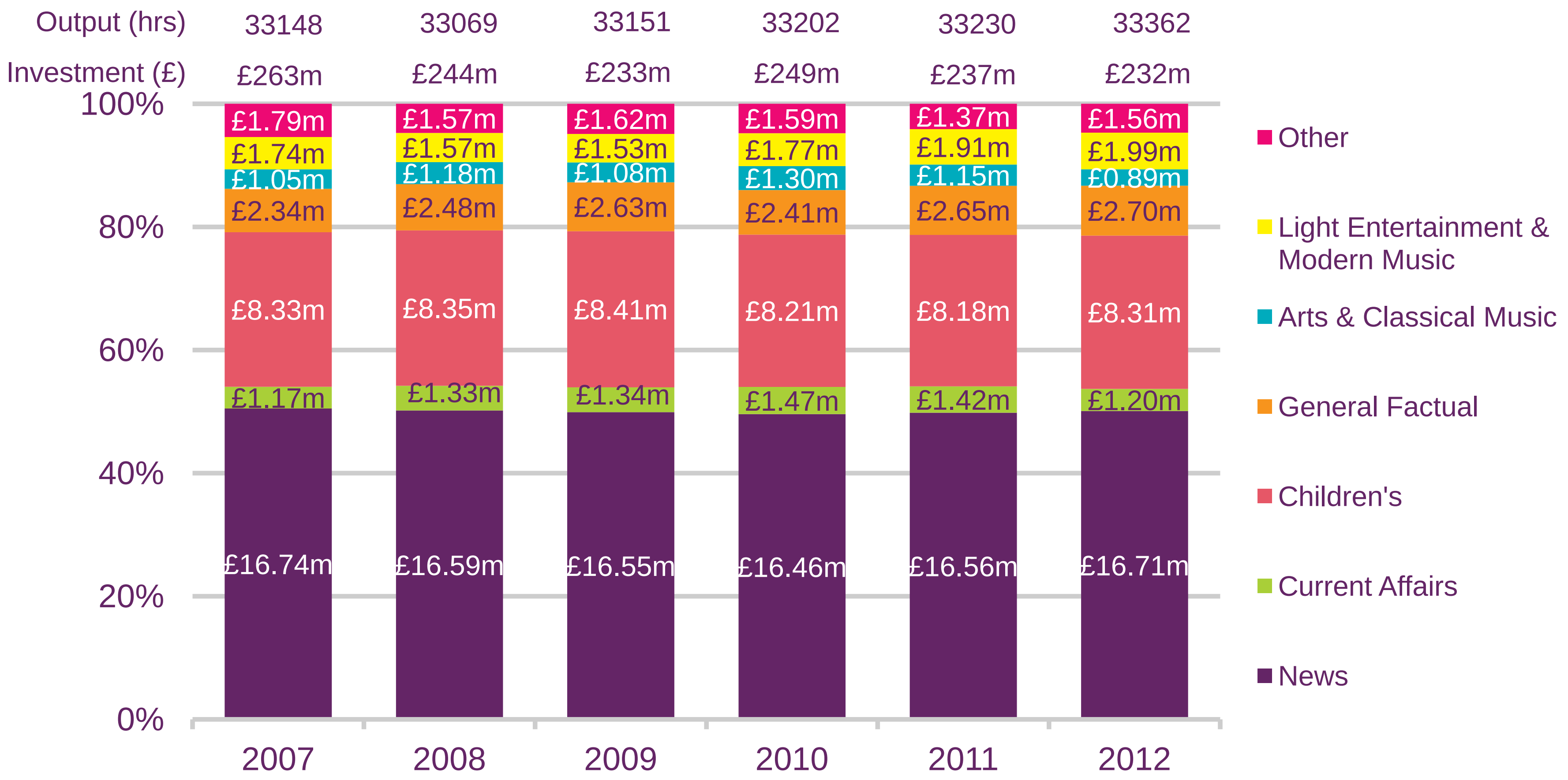
Proportions of total hours



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

Figure 2.50

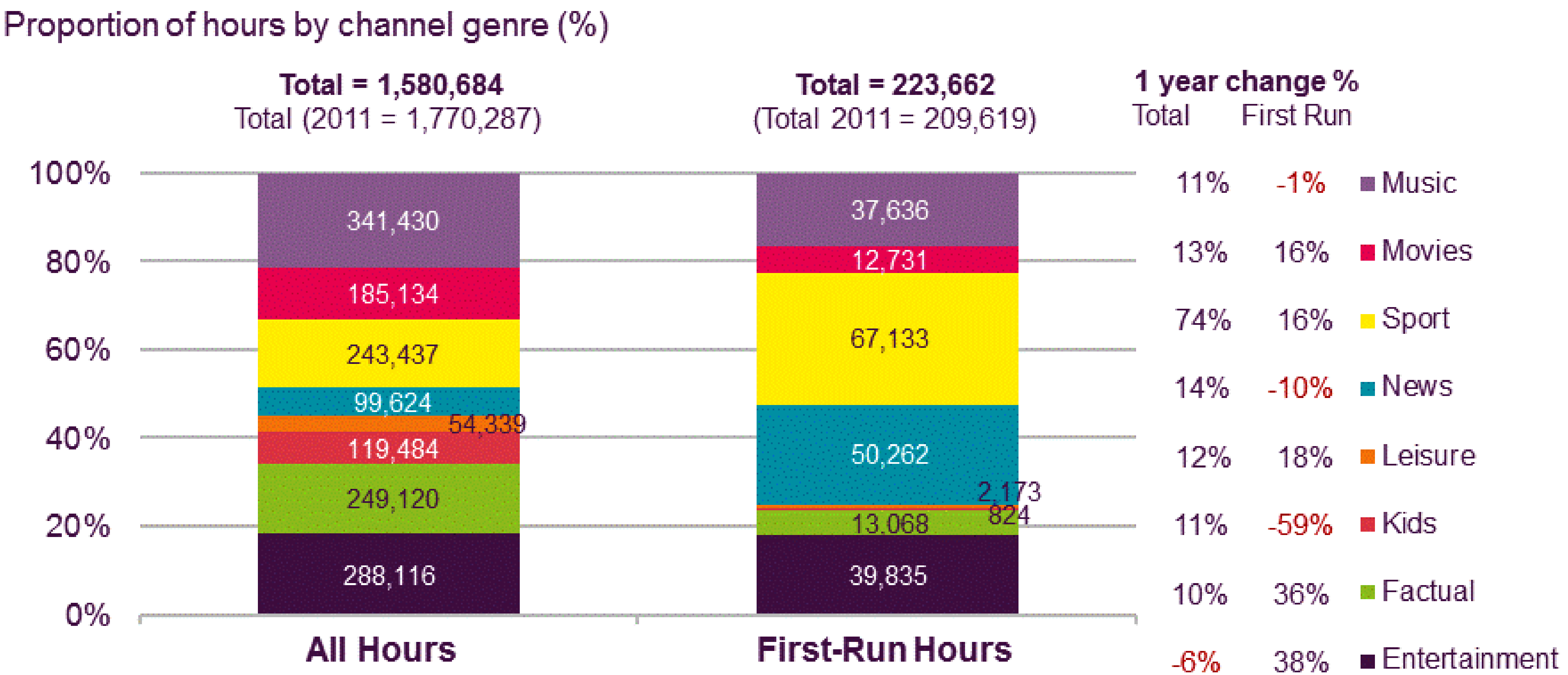
The BBC's digital channels genre mix by hours: all day



Source: Ofcom/broadcasters. Note: BBC digital channels include BBC Three, BBC Four, BBC News 24, BBC Parliament, CBBC, CBeebies. Investment figures are in 2012 prices. 'Other' includes: Education, Drama, Film, Religion and Sports

Figure 2.51

Total multichannel hours and first-run originations/acquisitions: 2012



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.

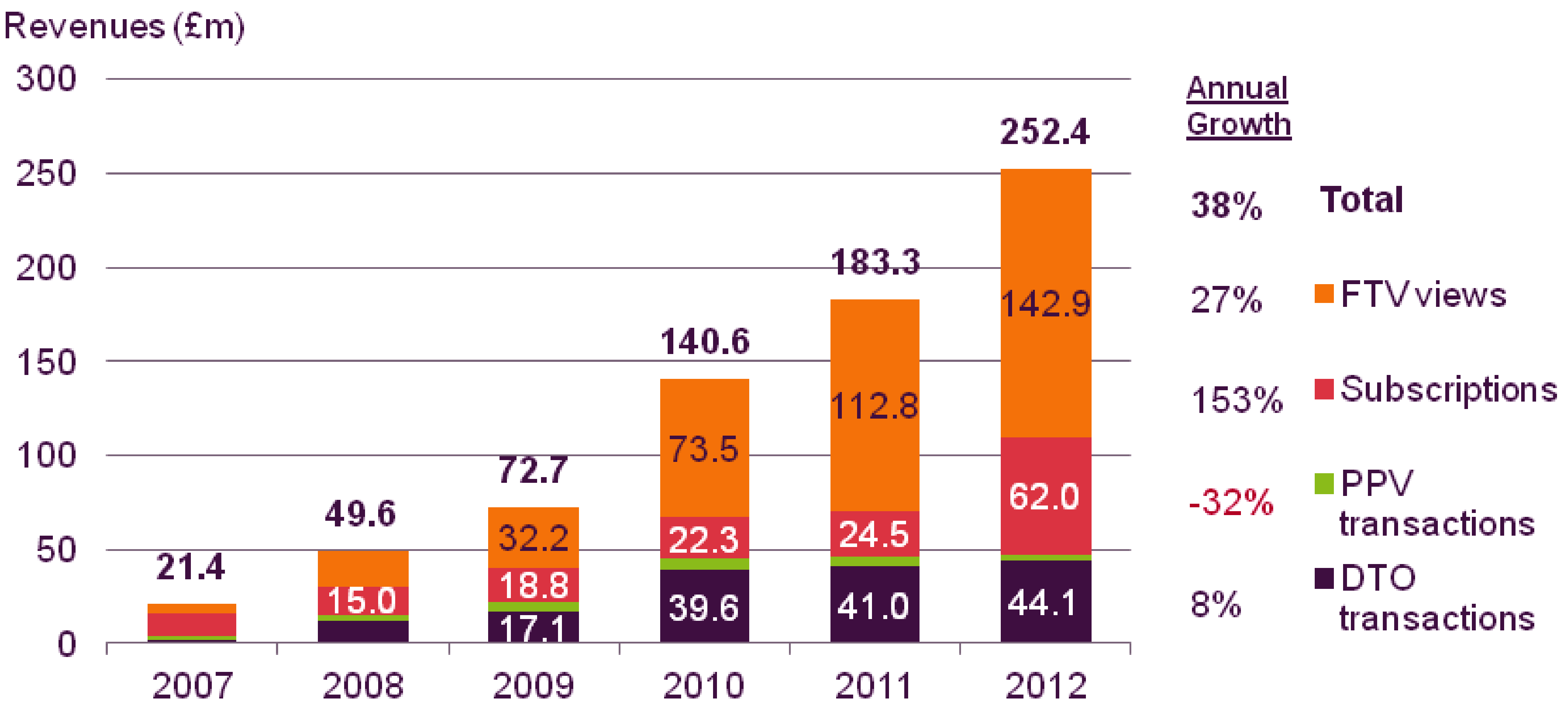
Figure 2.52

Content spend by commercial multichannels in key genres: 2011 - 2012

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

Figure 2.53

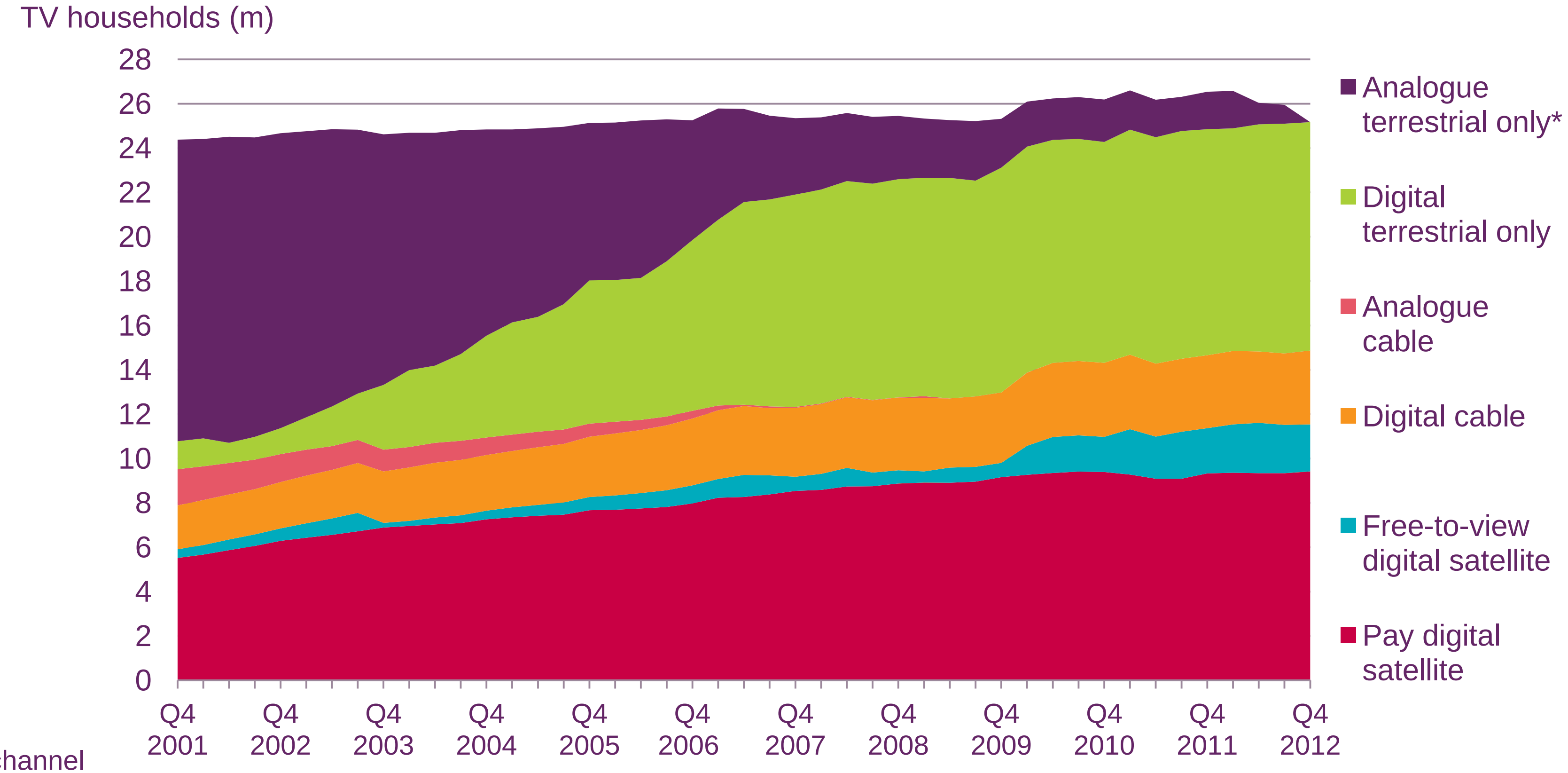
Online TV revenues



Source: IHS Screen Digest. Note: FTV (free to view) refers to services delivering online video free to the end consumer. Number of FTV streams includes both ad-supported services and services funded through other means (such as BBC iPlayer). FTV revenues include advertising revenues only. PPV (pay per view) refers to a method of renting digital content whereby customers commonly choose content on a la carte basis and pay to watch it for a limited period. The category includes all content consumed on an on-demand basis, including traditional PPV (such as per live sports) and VoD. DTO (download to own) refers to a method of obtaining content that gives the customer ownership over the files they have downloaded, allowing the customer to use the content as many times as they like. Some figures have been restated since last year following consultation with broadcasters.

Figure 2.54

Platform take-up survey results: Q4 2001 – Q4 2012

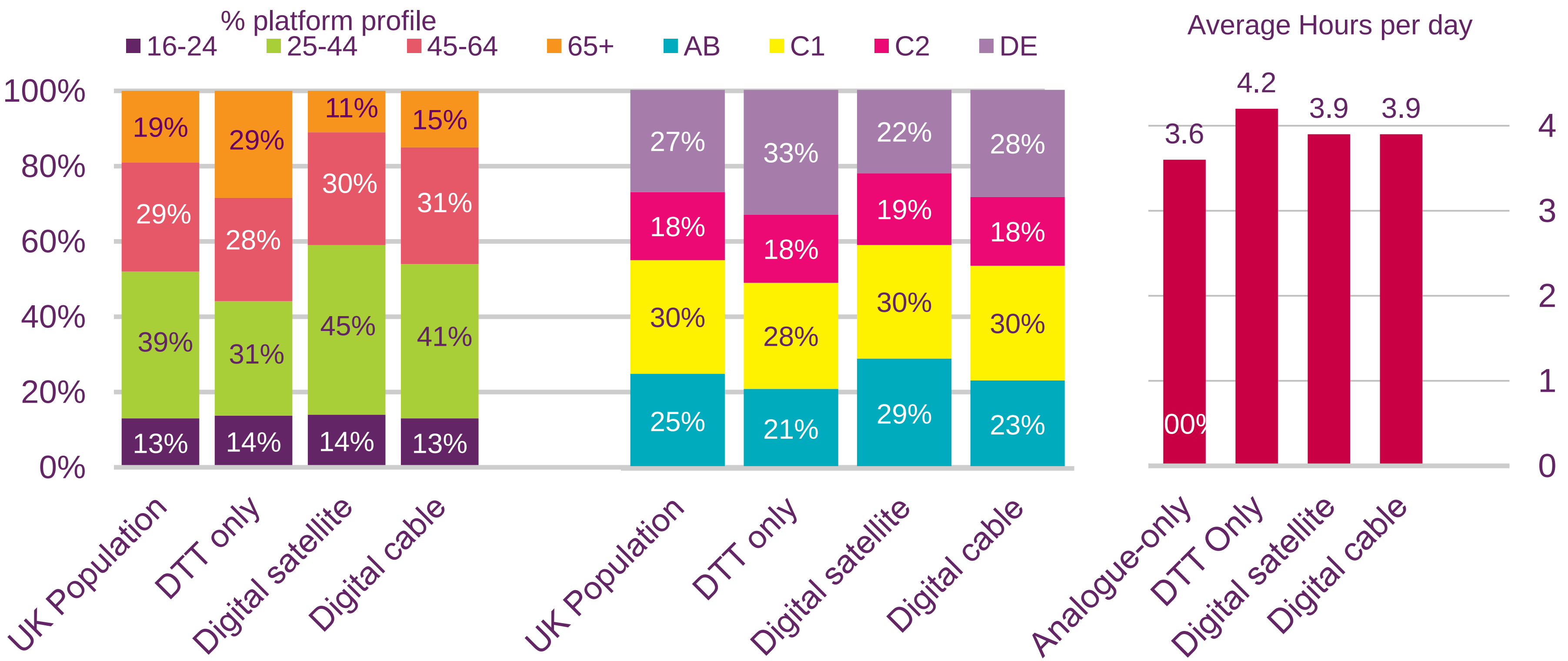


Multichannel take-up (% all households)	44.3%	46.0%	54.2%	62.6%	71.8%	78.6%	86.5%	88.9%	91.4%	92.5%	93.4%	98.0%

Source: Ofcom / GfK NOP consumer research from Q1 2007. Sample GB only.
Note: (1) Previous quarters include subscriber data and Ofcom estimates for digital terrestrial and free-to-view satellite.*Some analogue terrestrial only households would have watched TV through a device connected to their set (e.g. a games console), through another connected device or misreported themselves as analogue terrestrial. From Q2 2012 GfK amended its questionnaire in regions where switchover was complete so that non-multichannel households were no longer recorded as TV households.

Figure 2.55

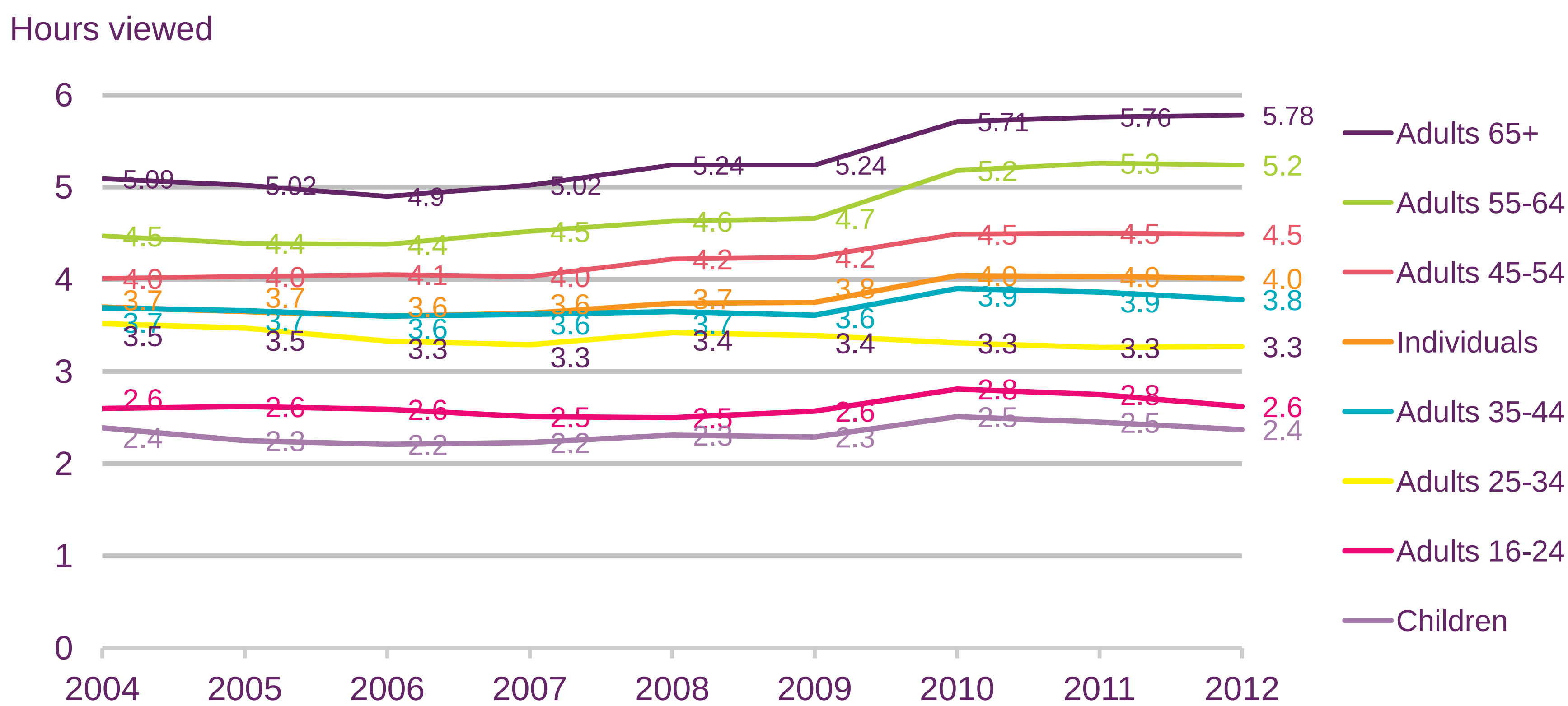
Platform demographics by age, socio-economic group and viewing hours



Source: Ofcom 2013 data and BARB 2012 data

Figure 2.56

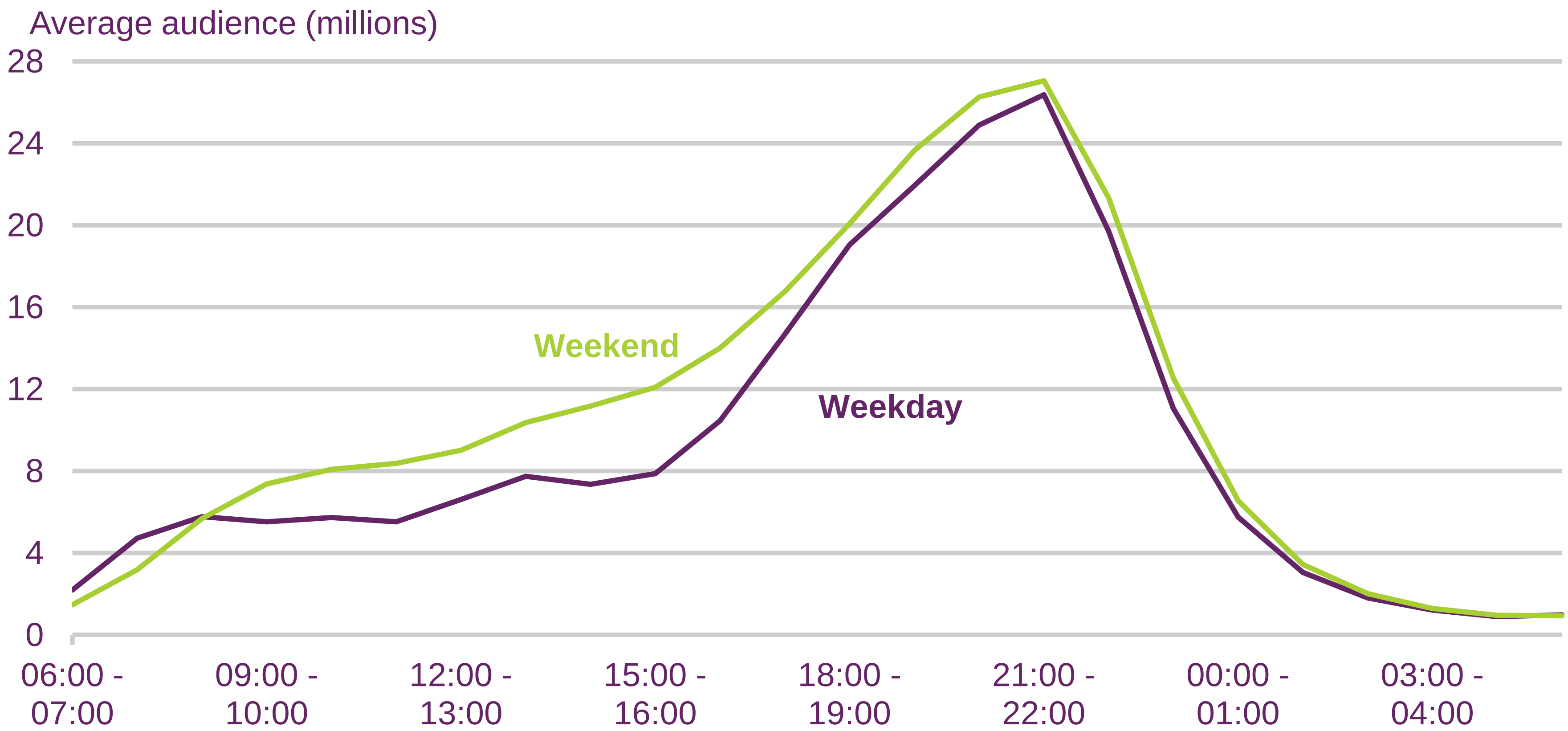
Average hours of television viewing per day, by age, all homes: 2004 to 2012



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

Figure 2.57

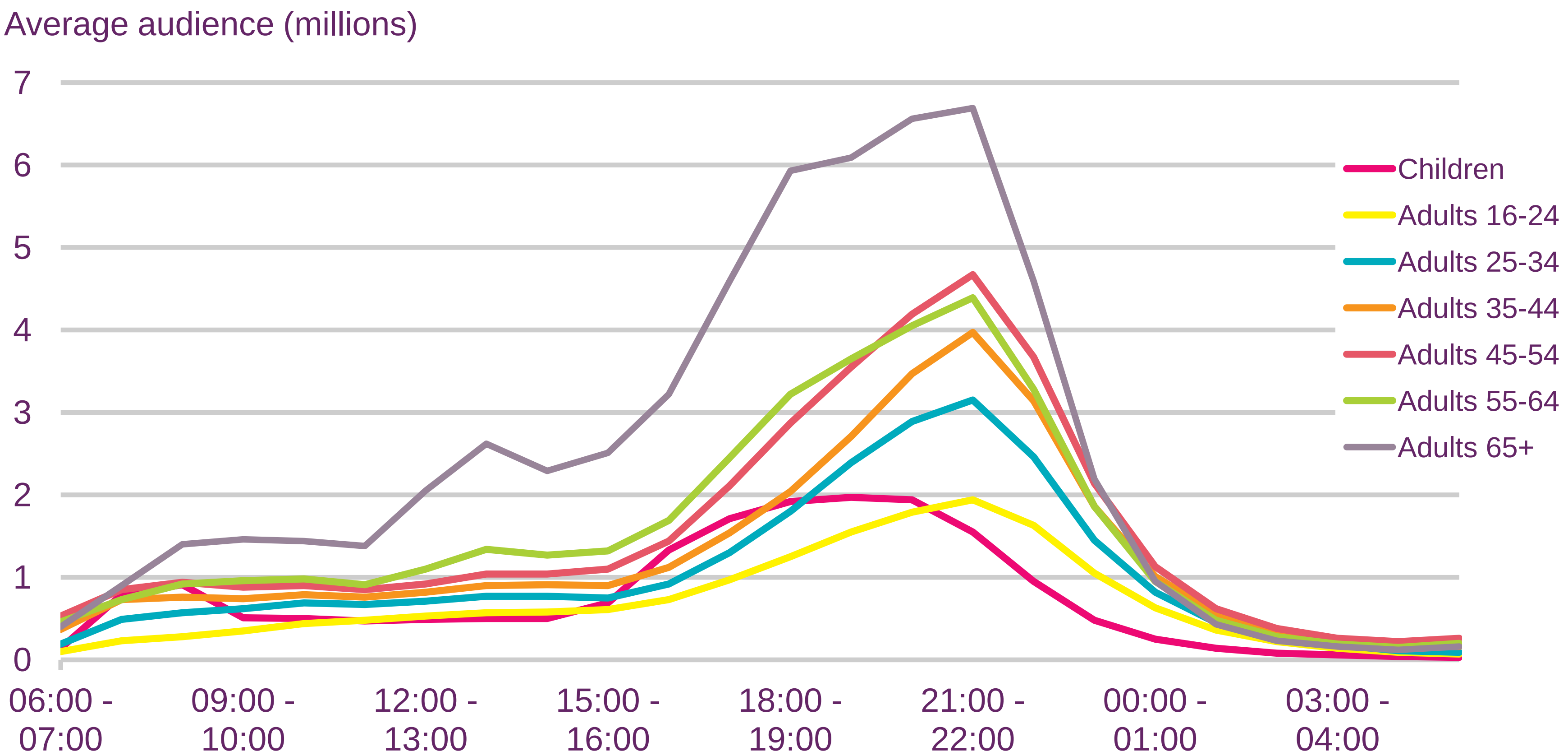
Average 2012 audiences, weekdays/weekends: by day part, all homes



Source: BARB, all Individuals 4+

Figure 2.58

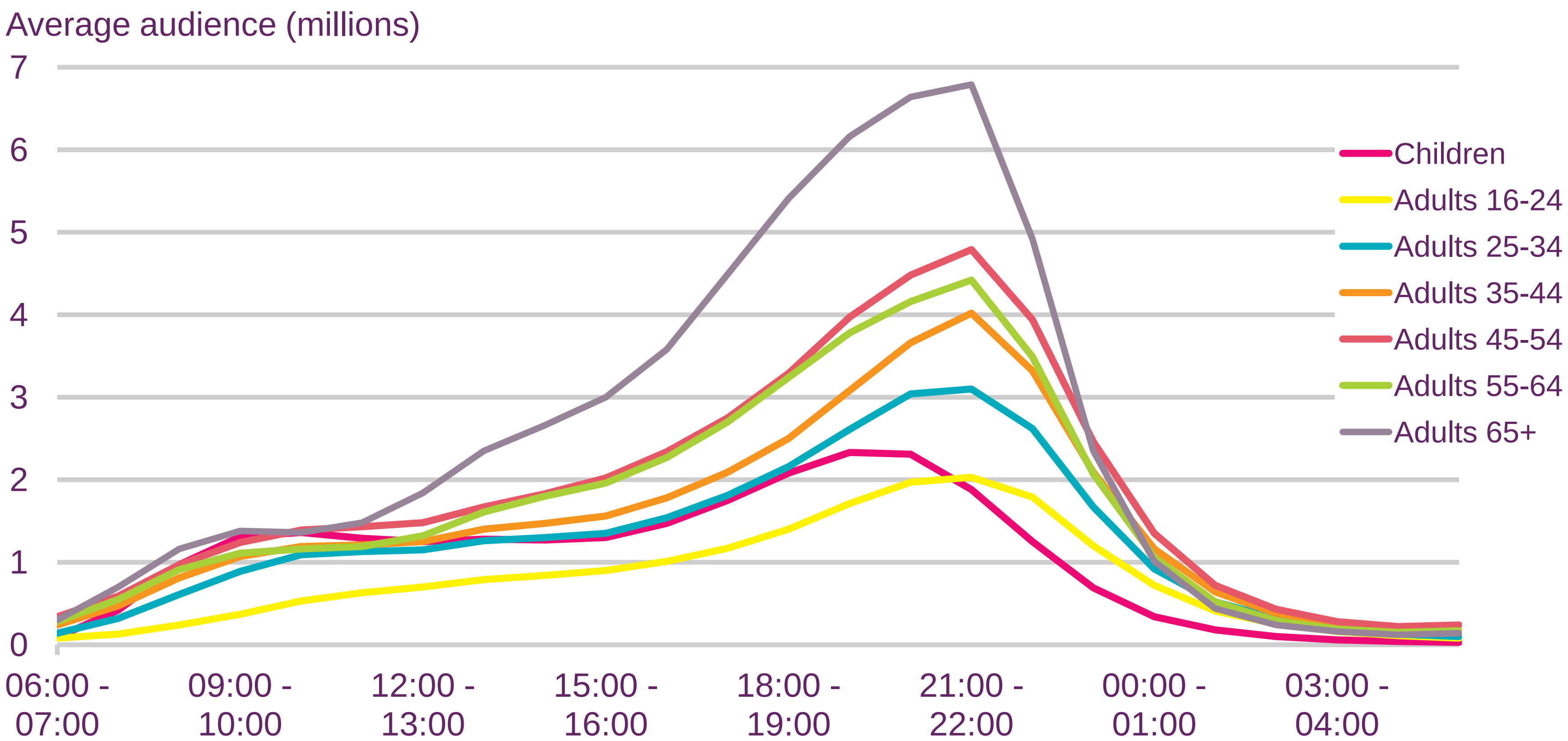
Average 2012 weekday audiences, by day part and age, all homes



Source: BARB

Figure 2.59

Average 2012 weekend audiences, by day part and age, all homes

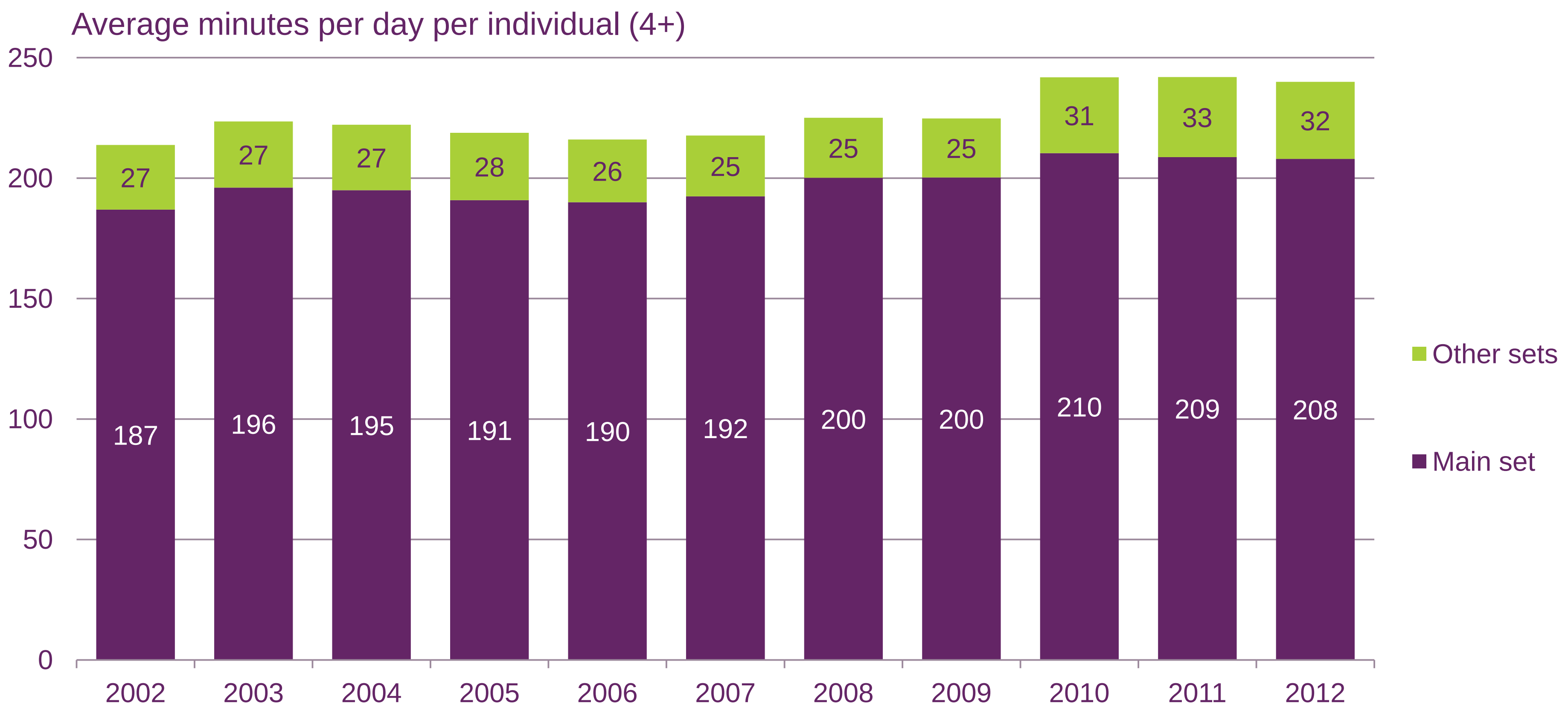


Source: BARB

Figure 2.60

Total TV viewing, main sets vs. other sets: 2002 - 2012

35%	37%	36%	37%	36%	37%	38%	39%	39%	40%	41% = single set HH

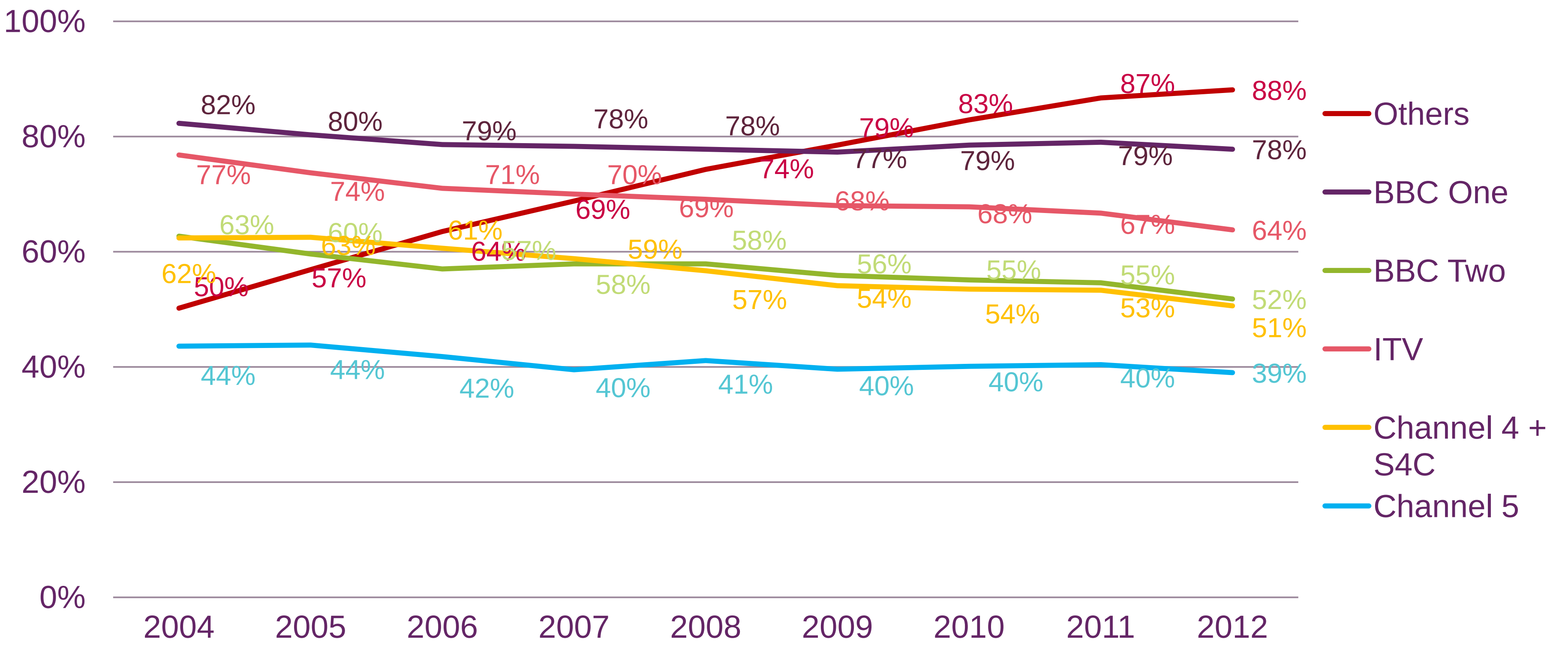


Source: BARB, all individuals (4+), all homes. BARB Establishment Surveys – Annual Network Q2 reports. Note: i) New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. ii) 'Main set' defined as set located in the living room. 'Other sets' defined as all other TV sets in the home.

Figure 2.61

Average weekly TV reach, all homes: 2004 to 2012

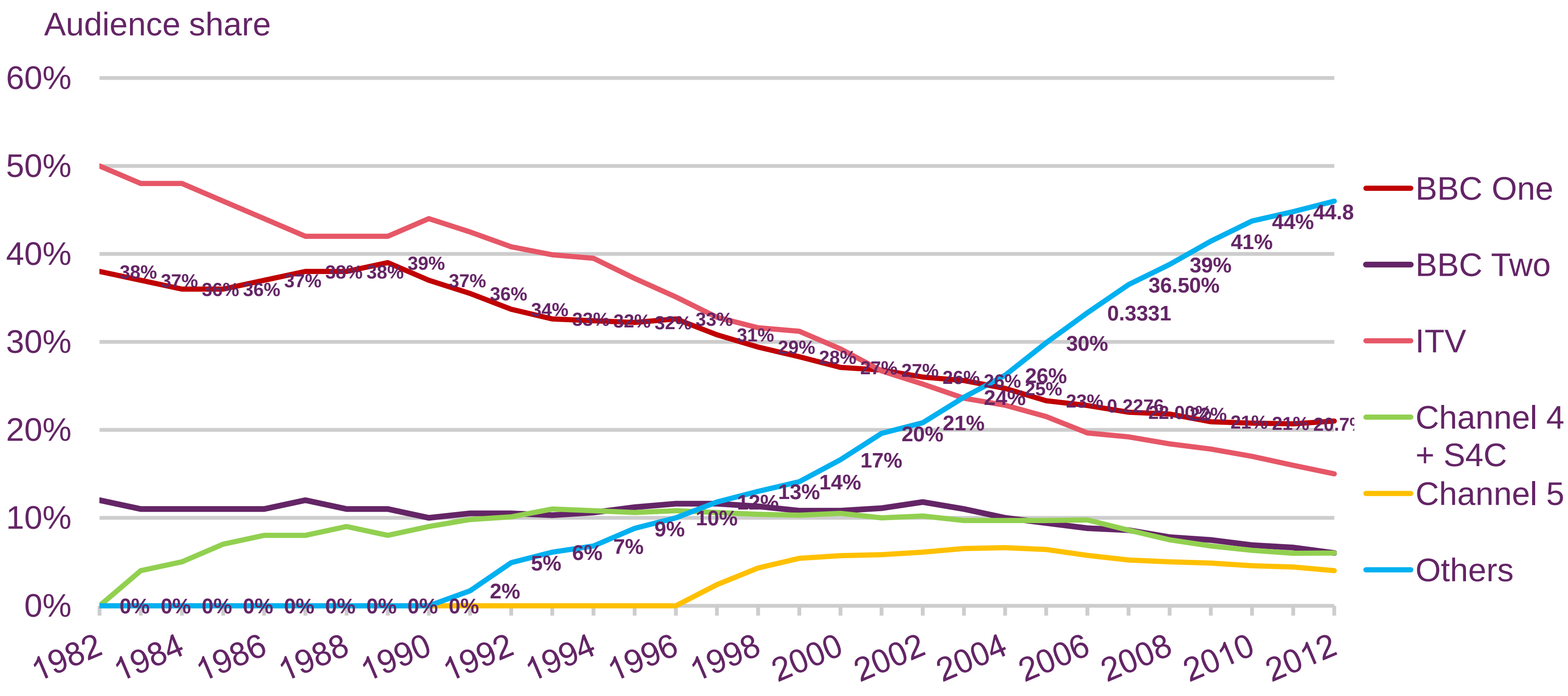
15-minute consecutive weekly reach – full weeks



Source: BARB Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts. S4C weekly reach in 2011 was 1% (all homes). HD and SD viewing included.

Figure 2.62

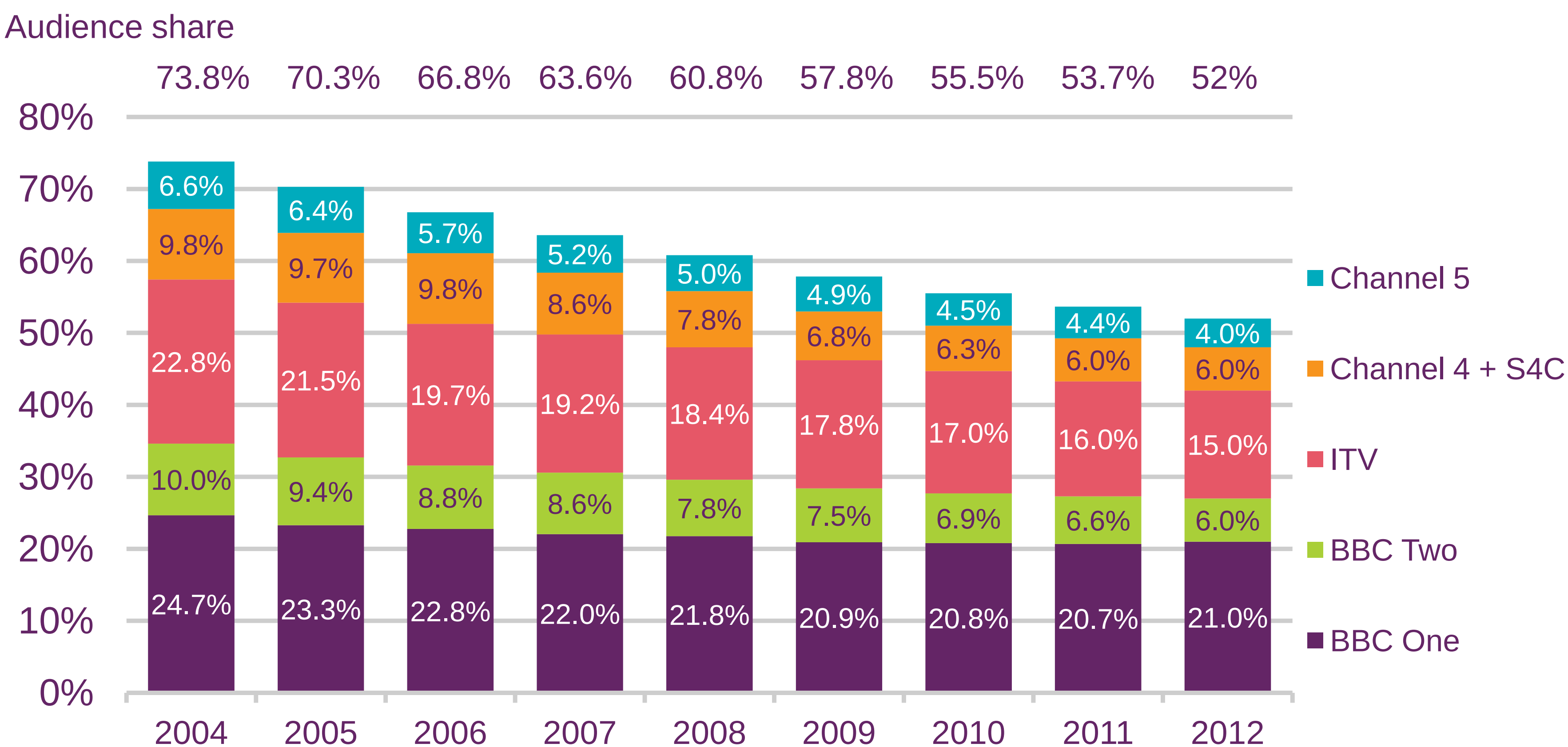
Channel shares in all homes: 1982 to 2012



Source: BARB, TAM JICTAR and Ofcom estimates. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts. S4C 2012 channel share = 0.2%. HD and SD viewing included.

Figure 2.63

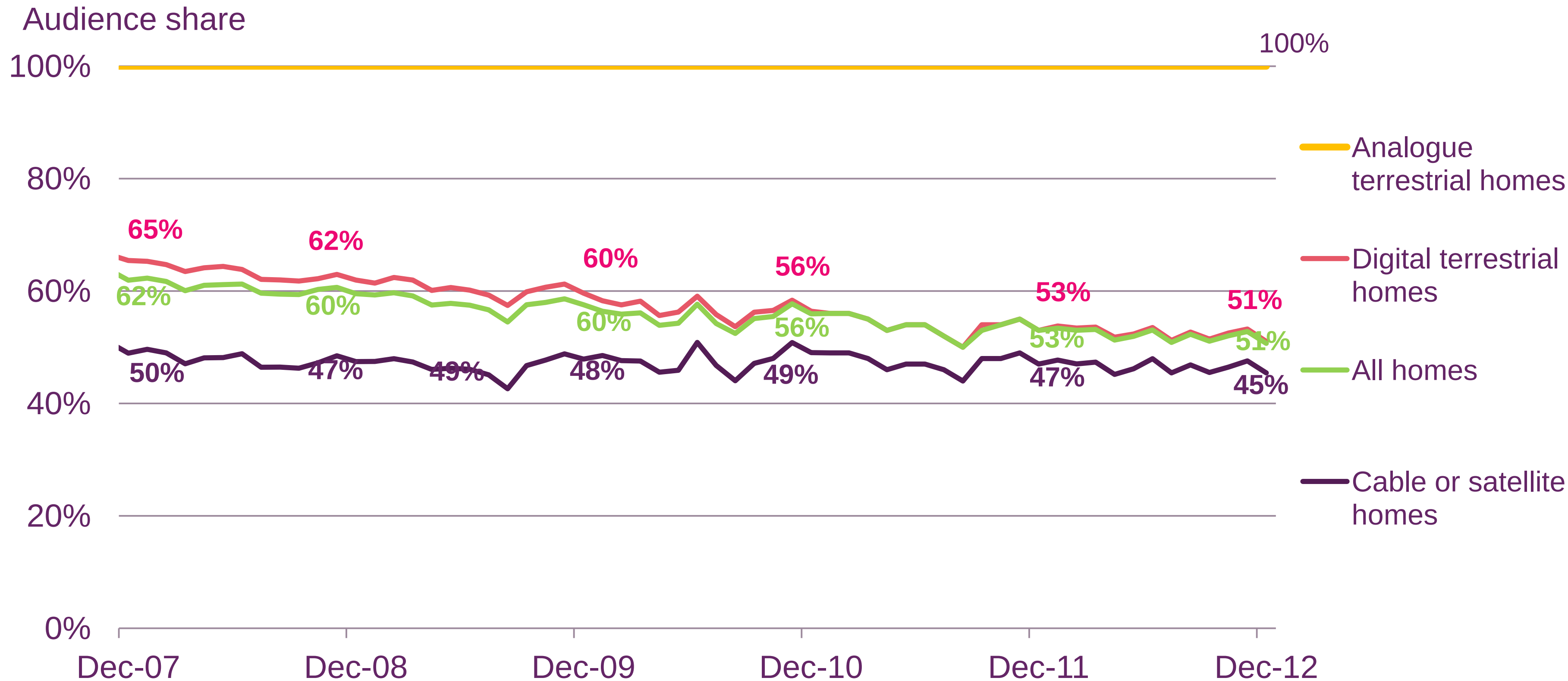
Five main PSB channels' audience share, all homes



Source: BARB. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts.S4C 2012 channel share = 0.1%. HD and SD viewing included

Figure 2.64

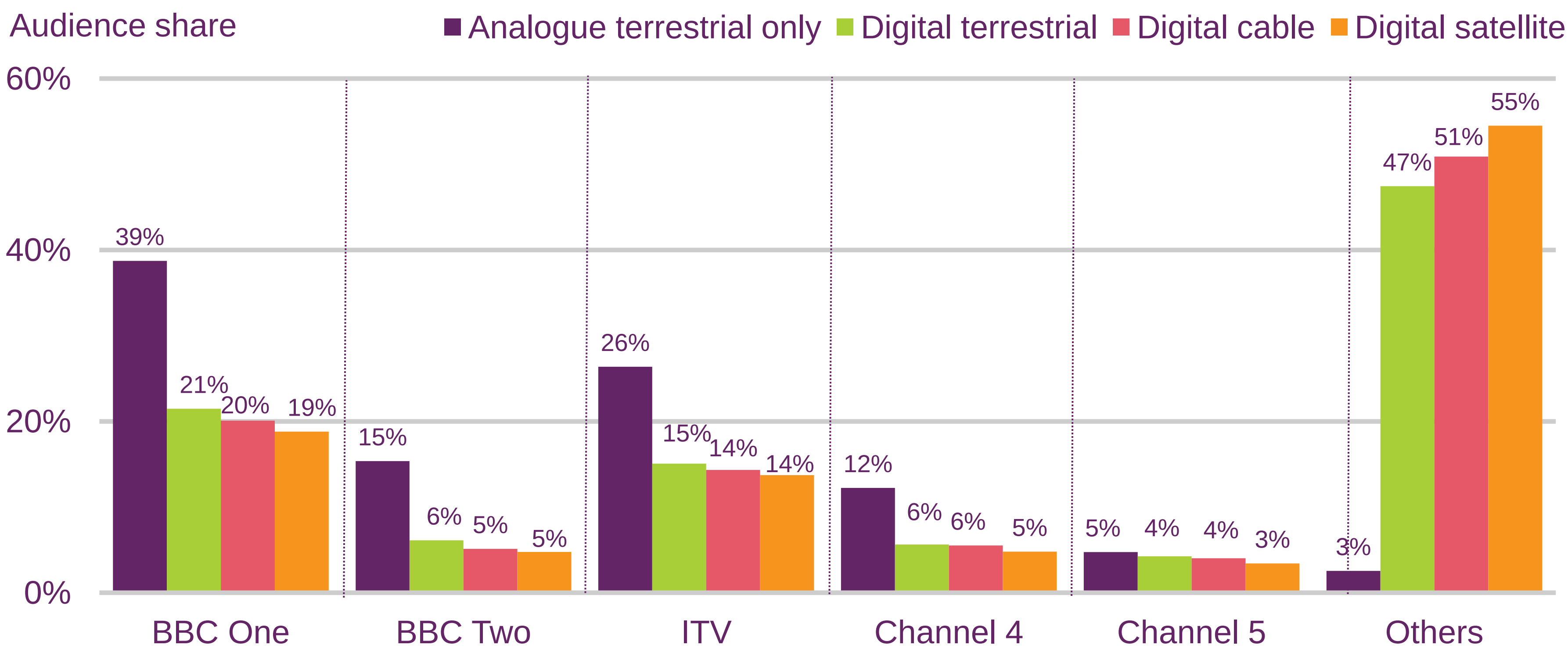
Five main PSB channels' audience share, by platform



Source: BARB, all homes, all viewers, various platforms. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain grouped together in relevant charts.S4C 2012 channel share (all homes)= 0.1%. HD and SD viewing included.

Figure 2.65

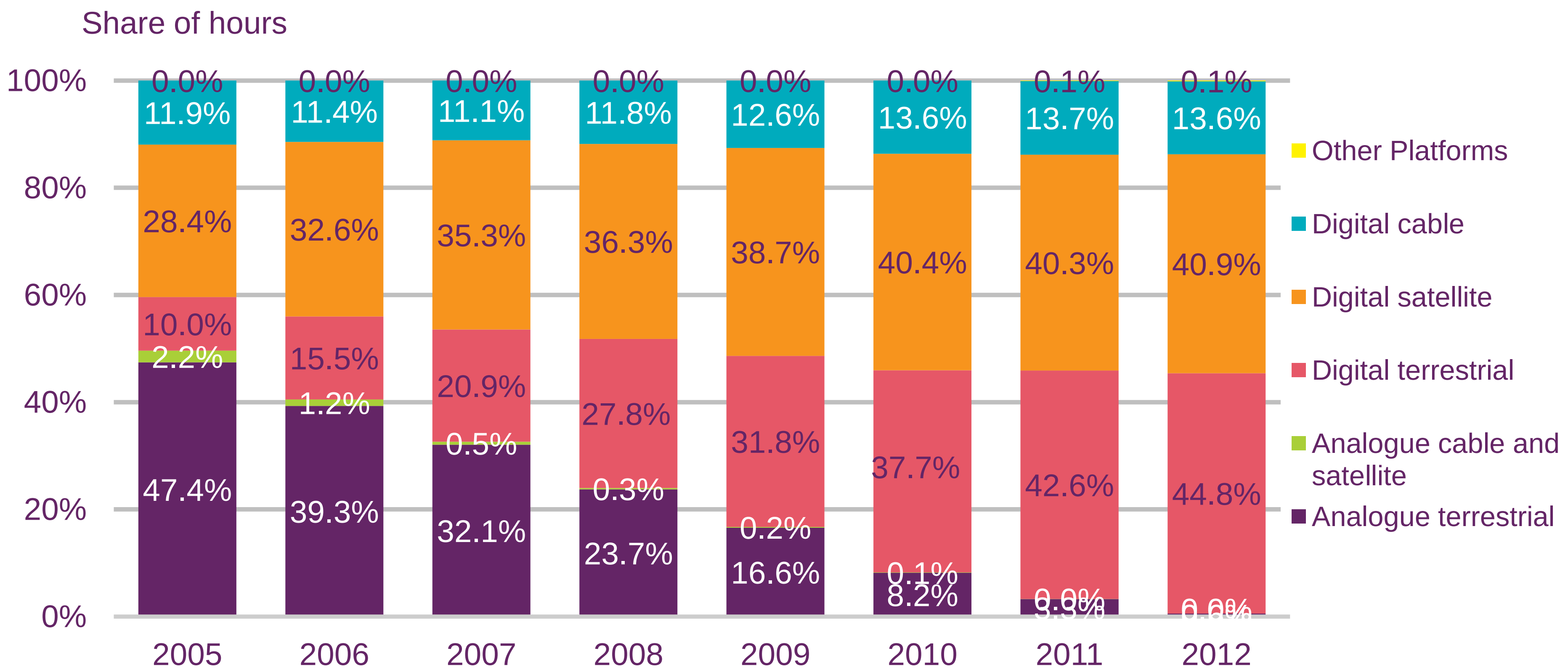
Channel share, by platform: 2012



Source: BARB. Individuals in platform homes, Share (%). HD and SD viewing included Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts.S4C 2012 channel share (all homes) = 0.1%.

Figure 2.66

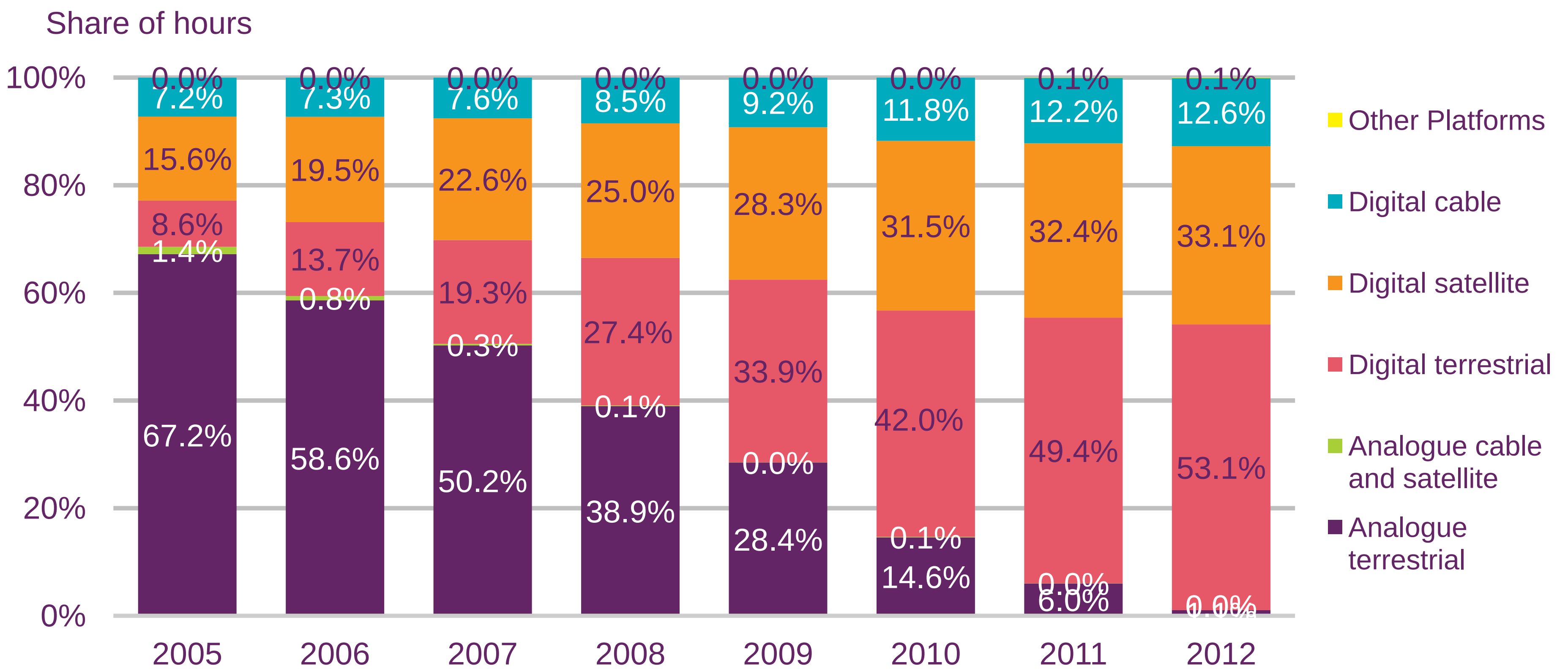
Share of total TV viewing hours, by platform signal



Source: BARB, Individuals 4+, all homes, total hours. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.67

Five main PSB channels' share of total hours by platform signal

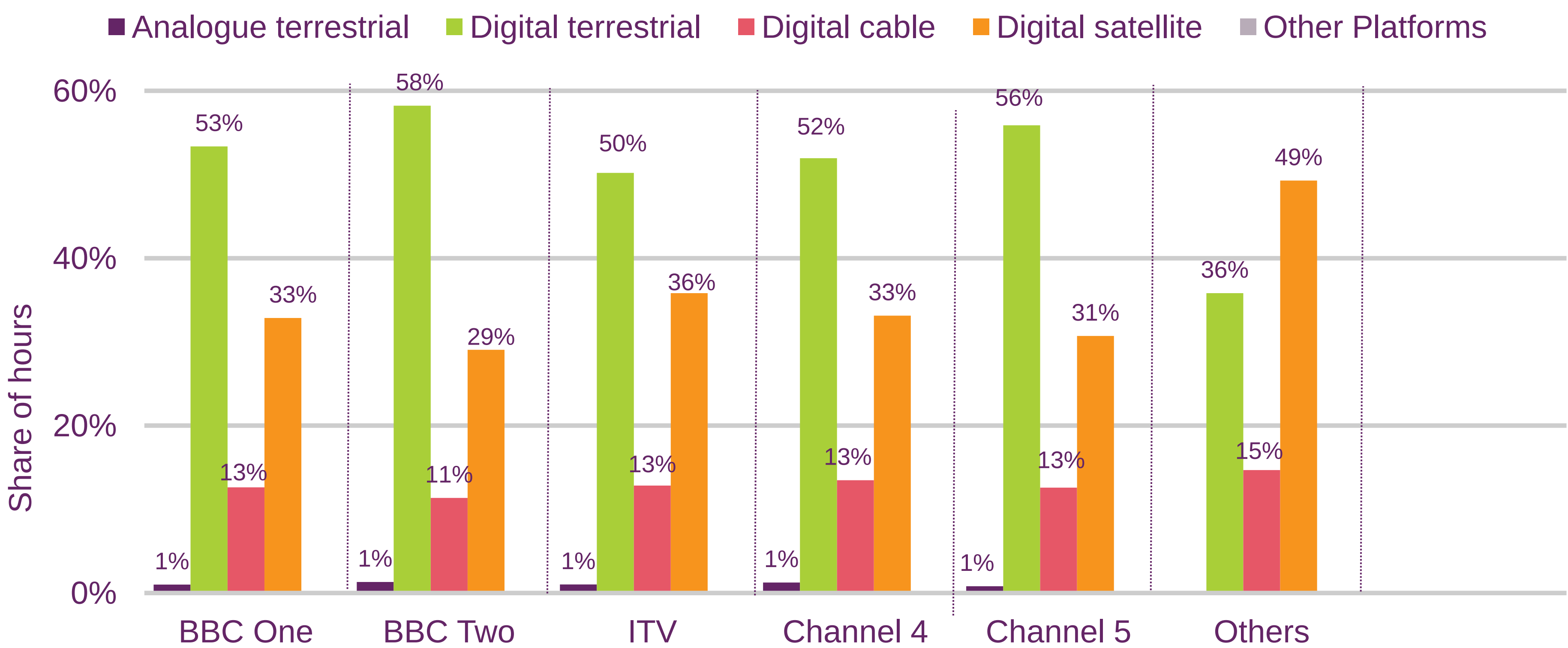


	2005	2006	2007	2008	2009	2010	2011	2012
Other Platforms	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Digital cable	7.2%	7.3%	7.6%	8.5%	9.2%	11.8%	12.2%	12.6%
Digital satellite	15.6%	19.5%	22.6%	25.0%	28.3%	31.5%	32.4%	33.1%
Digital terrestrial	8.6%	13.7%	19.3%	27.4%	33.9%	42.0%	49.4%	53.1%
Analogue cable and satellite	1.4%	0.8%	0.3%	0.1%	0.0%	0.1%	0.0%	0.0%
Analogue terrestrial	67.2%	58.6%	50.2%	38.9%	28.4%	14.6%	6.0%	0.0%

Source: BARB, all Individuals, total hours. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain grouped together in relevant charts.

Figure 2.68

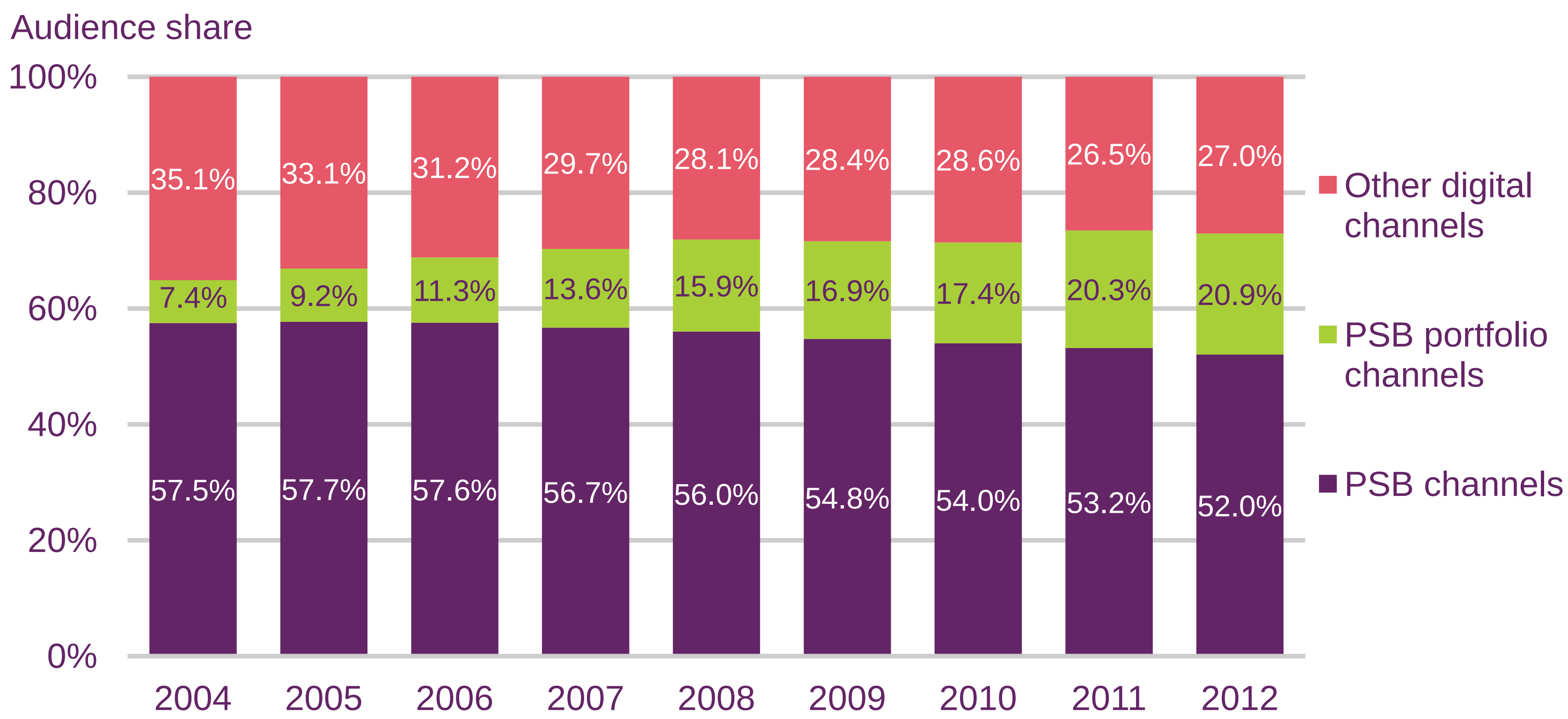
Share of viewing hours for main PSB channels, by platform: 2012



Source: BARB, all Individuals, total hours. HD and SD viewing included Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts.

Figure 2.69

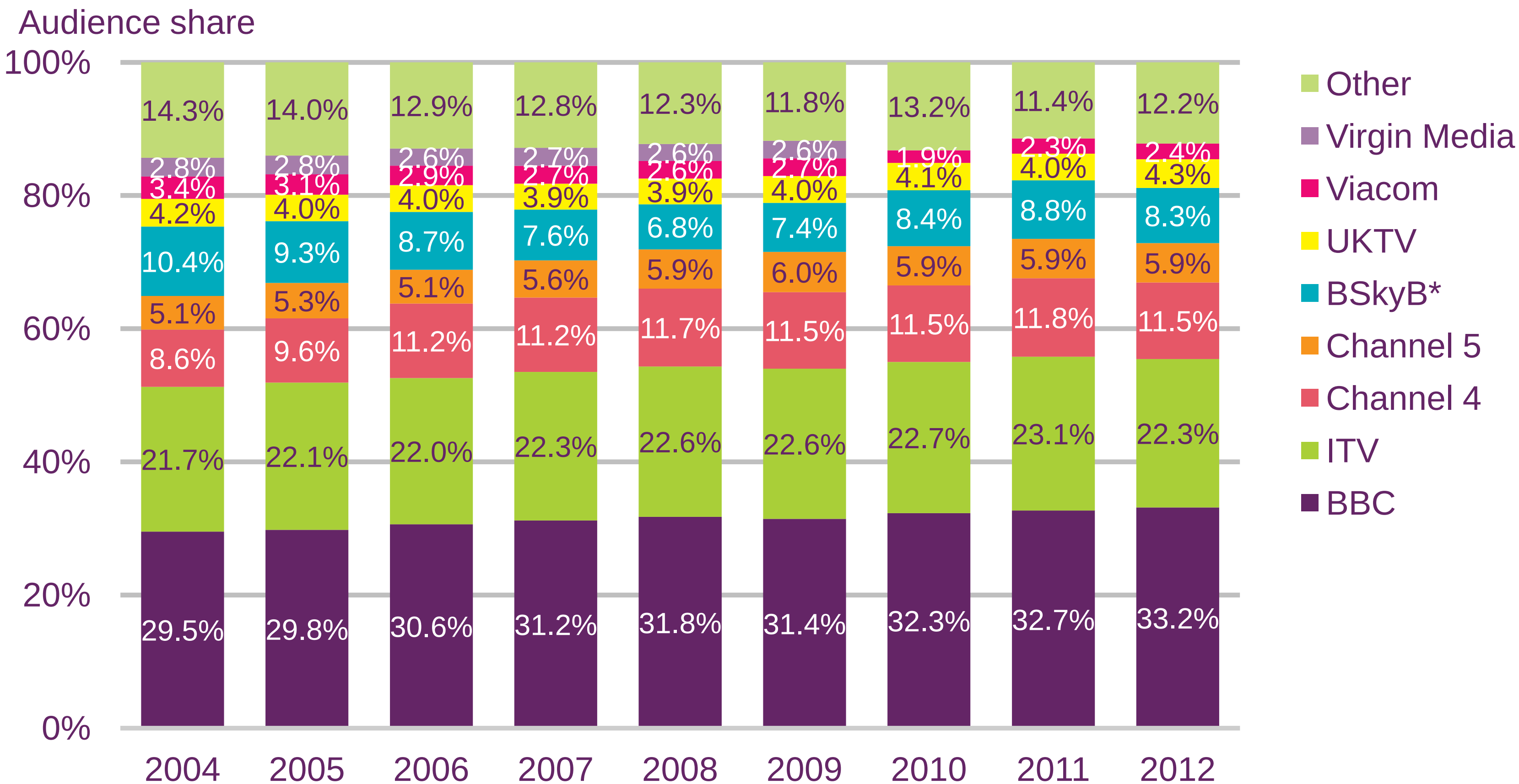
PSB and portfolio channel shares in multichannel homes



Source: BARB. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain grouped together in relevant charts.S4C 2012 channel share = 0.1%. HD and SD viewing included.

Figure 2.70

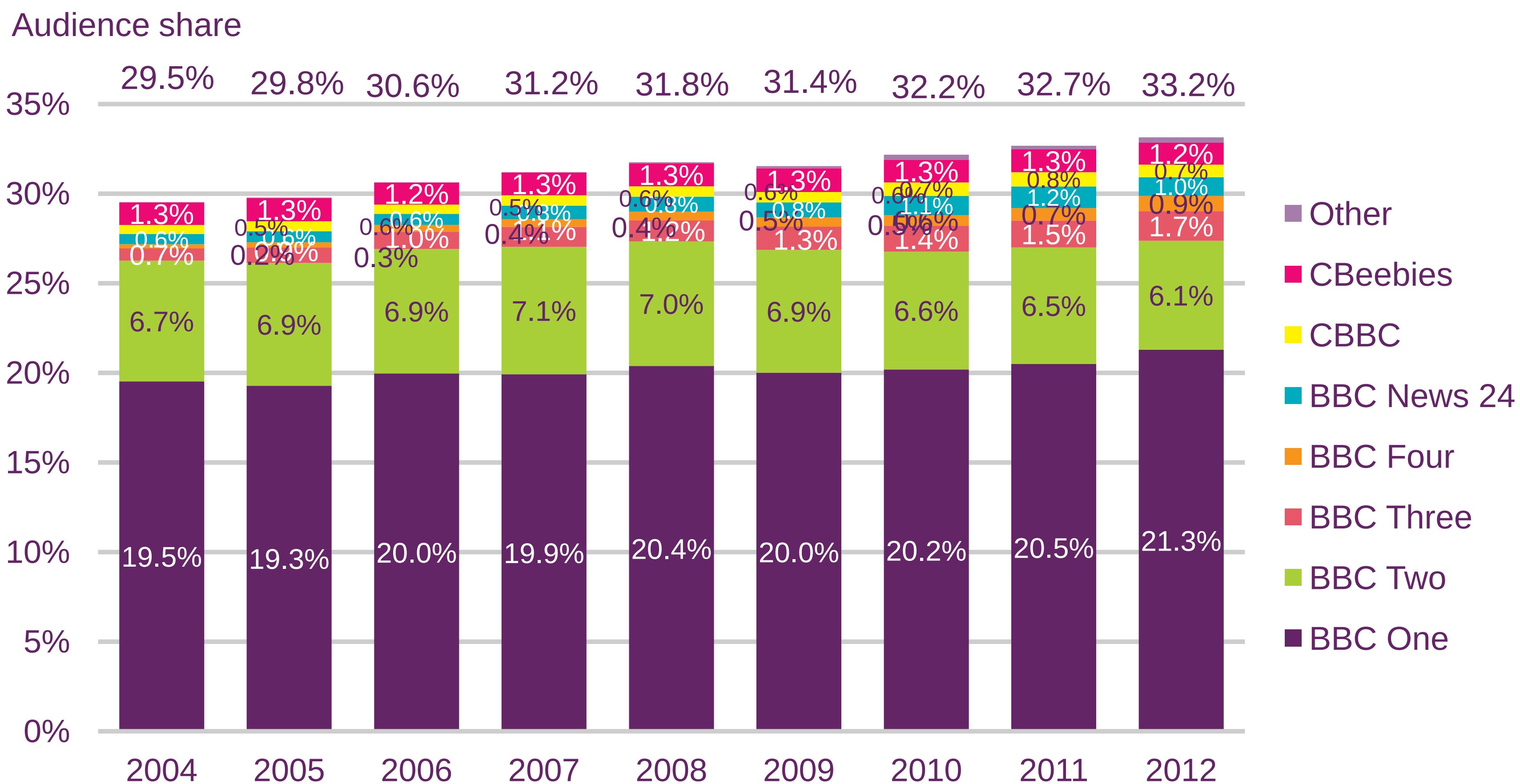
Broadcaster portfolio shares in multichannel homes



Source: BARB. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. The BBC portfolio in 2012 excludes the 24 dedicated Olympics channels which accounted for 0.21% share. BSkyB took ownership of VMTV in June 2010, Virgin Media TV portfolio shares are included in the BSkyB figure for the whole of 2010. ITV includes all ITV network channels, not just those owned by ITV plc. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain grouped together in relevant charts.S4C 2012 channel share = 0.1%. HD and SD viewing included.

Figure 2.71

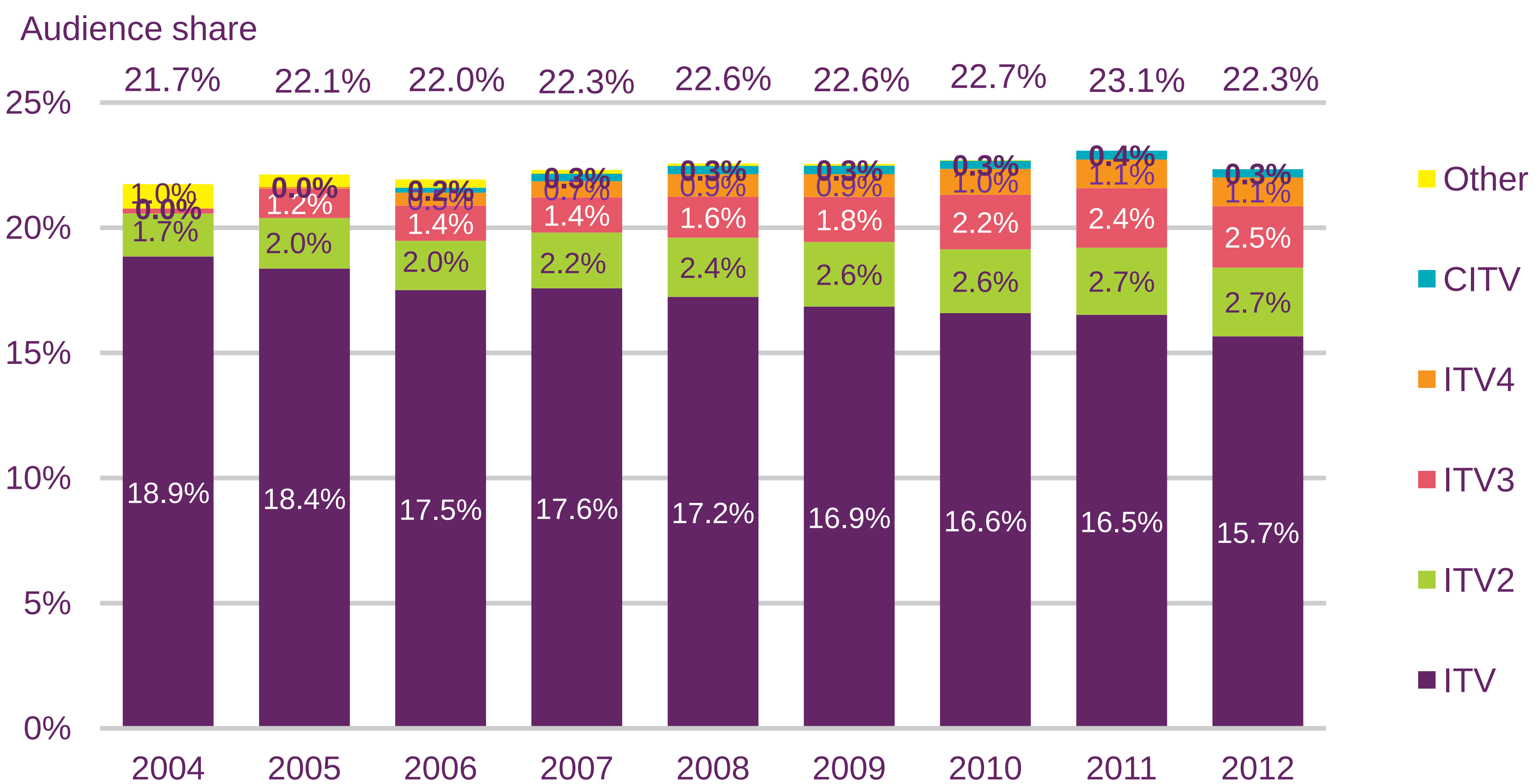
BBC portfolio shares in multichannel homes



Source: BARB Note: 'Other' includes BBC Parliament, BBC Choice, BBC HD and BBC Knowledge. A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. HD and SD viewing included

Figure 2.72

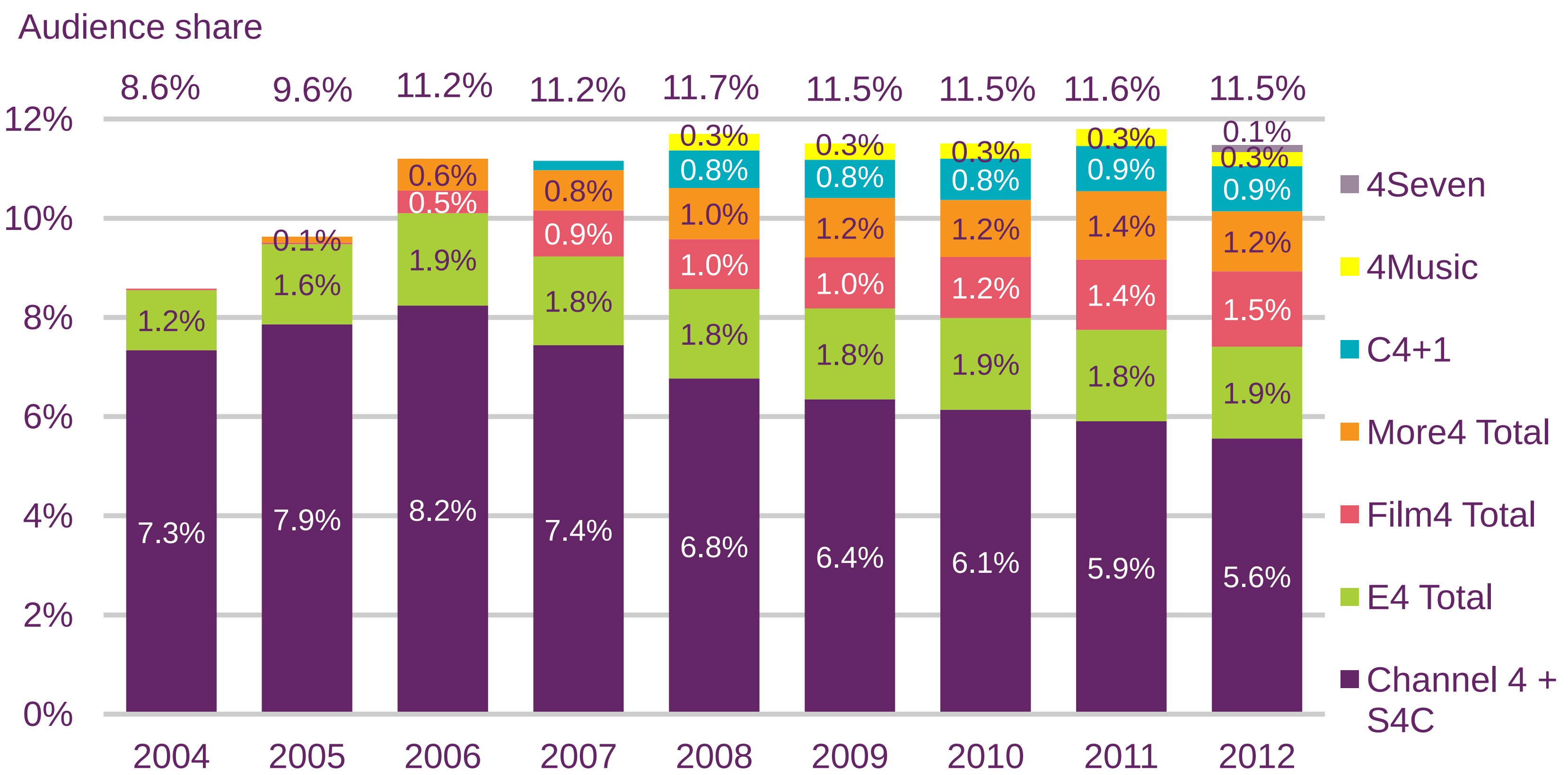
ITV portfolio shares in multichannel homes



Source: BARB. Note: 'Other' includes (when relevant) ITV Play, Men & Motors, GMTV2, Granada Breeze, Plus, ITV News. ITV1, ITV2, ITV3 and ITV4 and include +1 and HD services' shares. Due to a new BARB measurement panel from 2010 onwards, pre- and post-panel change data should be viewed with caution.

Figure 2.73

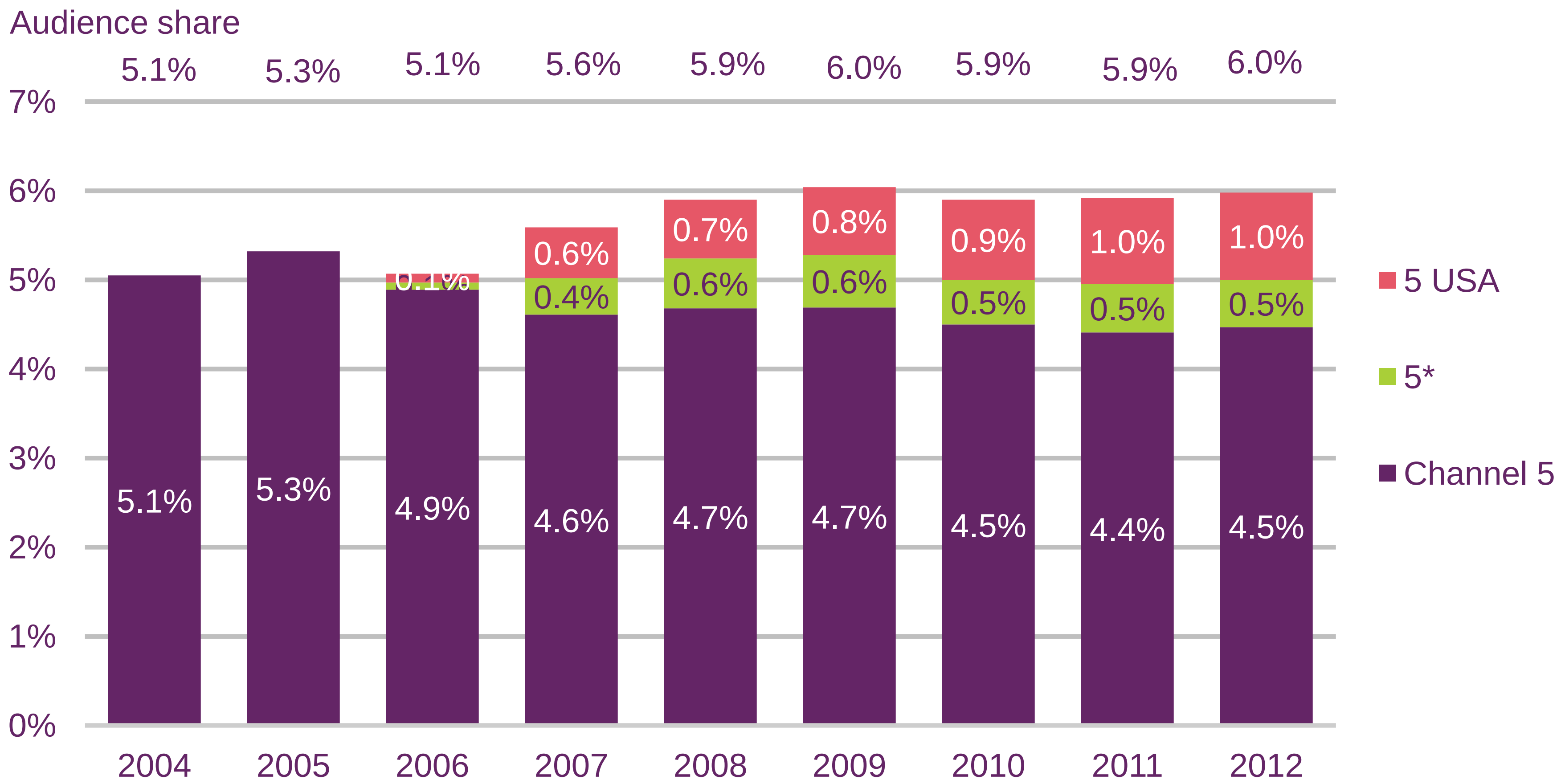
Channel 4 portfolio shares in multichannel homes



Source: BARB. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. E4, More4 and Film 4 respective +1 channel shares are included. 4seven launched 4th July 2012. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts. S4C 2012 channel share = 0.1%. HD and SD viewing included.

Figure 2.74

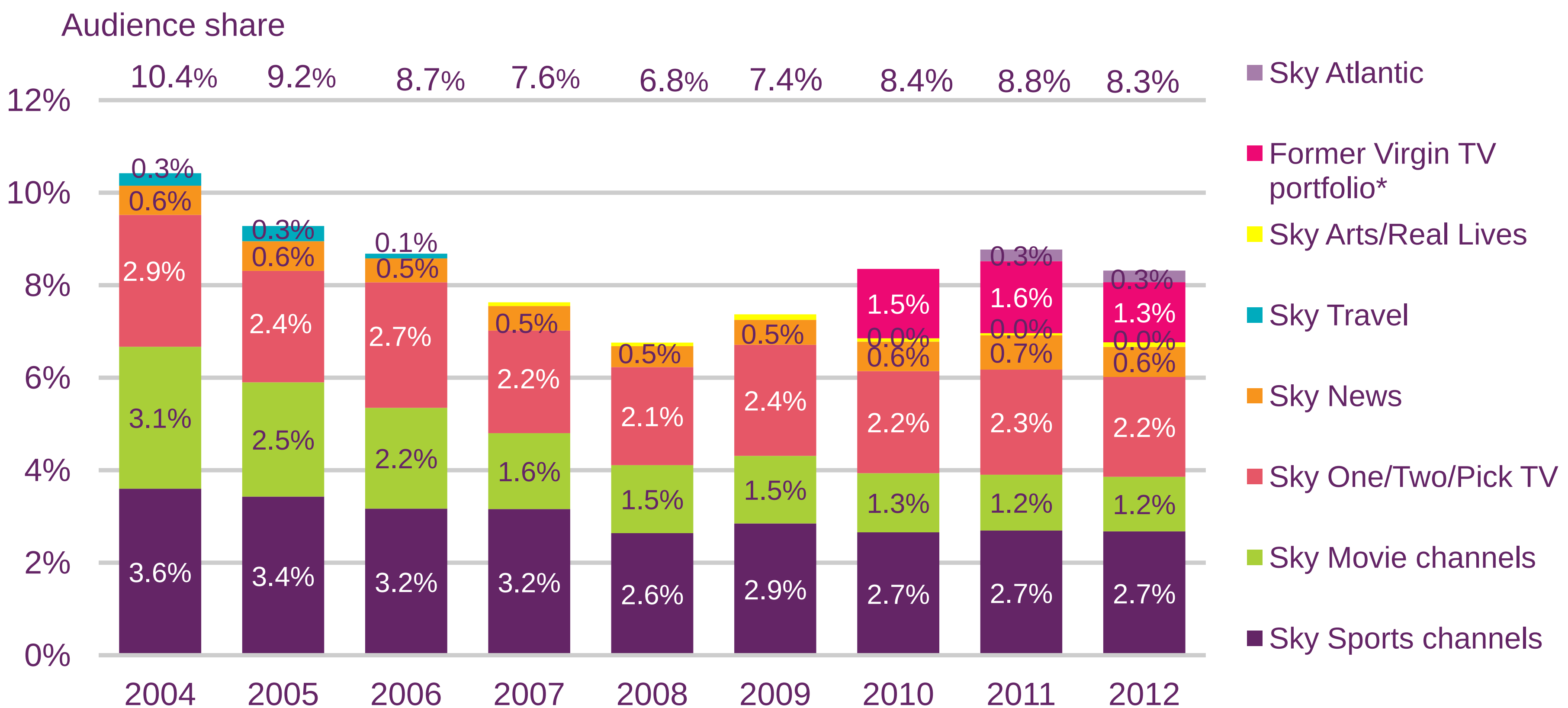
Channel 5 portfolio shares in multichannel homes



Source: BARB. Note: Channels include their +1 service. HD and SD viewing included. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.75

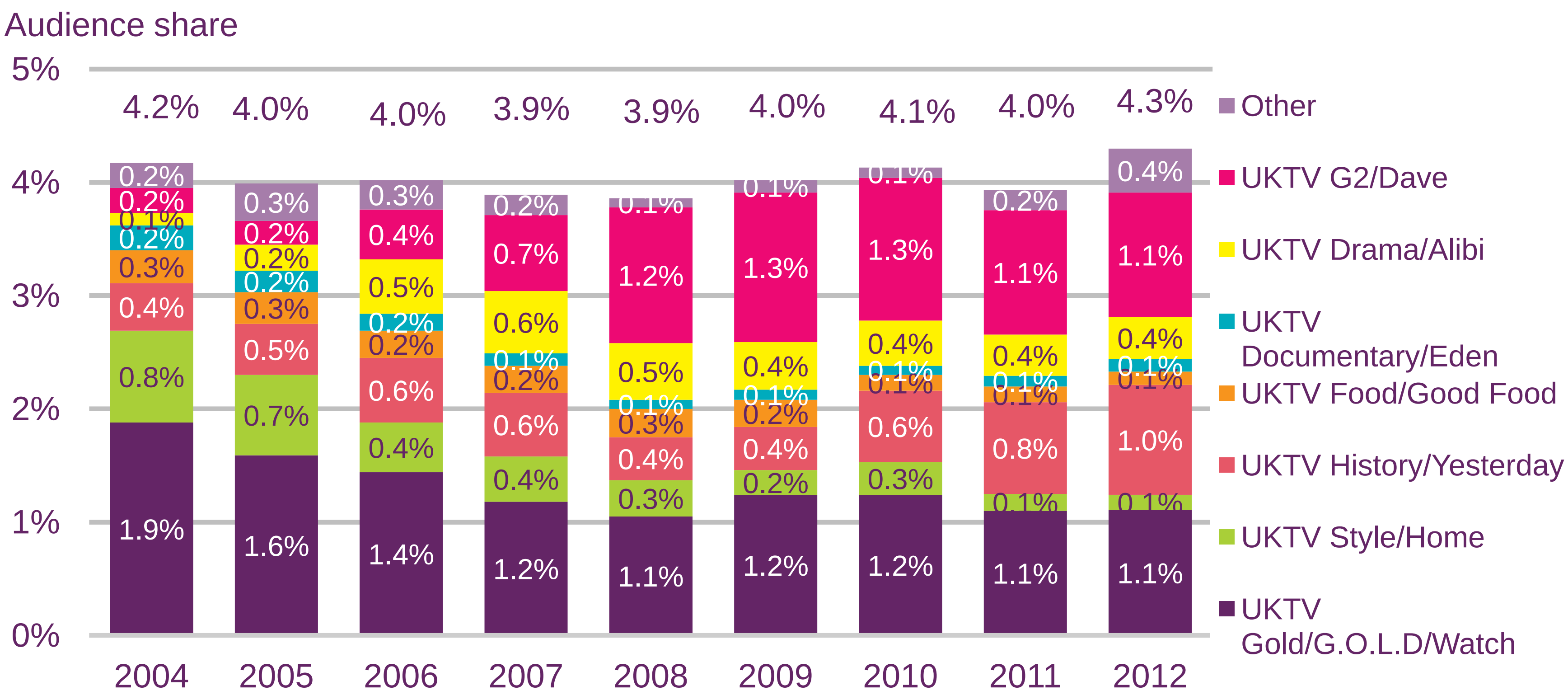
BSkyB portfolio shares in multichannel homes



Source: BARB. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. *BSkyB took ownership of VMTV in June 2010, Virgin Media TV portfolio shares are included in the BSkyB figure for the whole of 2010 onwards. HD and SD viewing included.

Figure 2.76

UKTV portfolio shares in multichannel homes



Source: BARB. Note: In 2008 figures, new channel names and shares have been matched to old channels. Dave went live in Oct 2007. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. HD and SD viewing included.

Figure 2.77

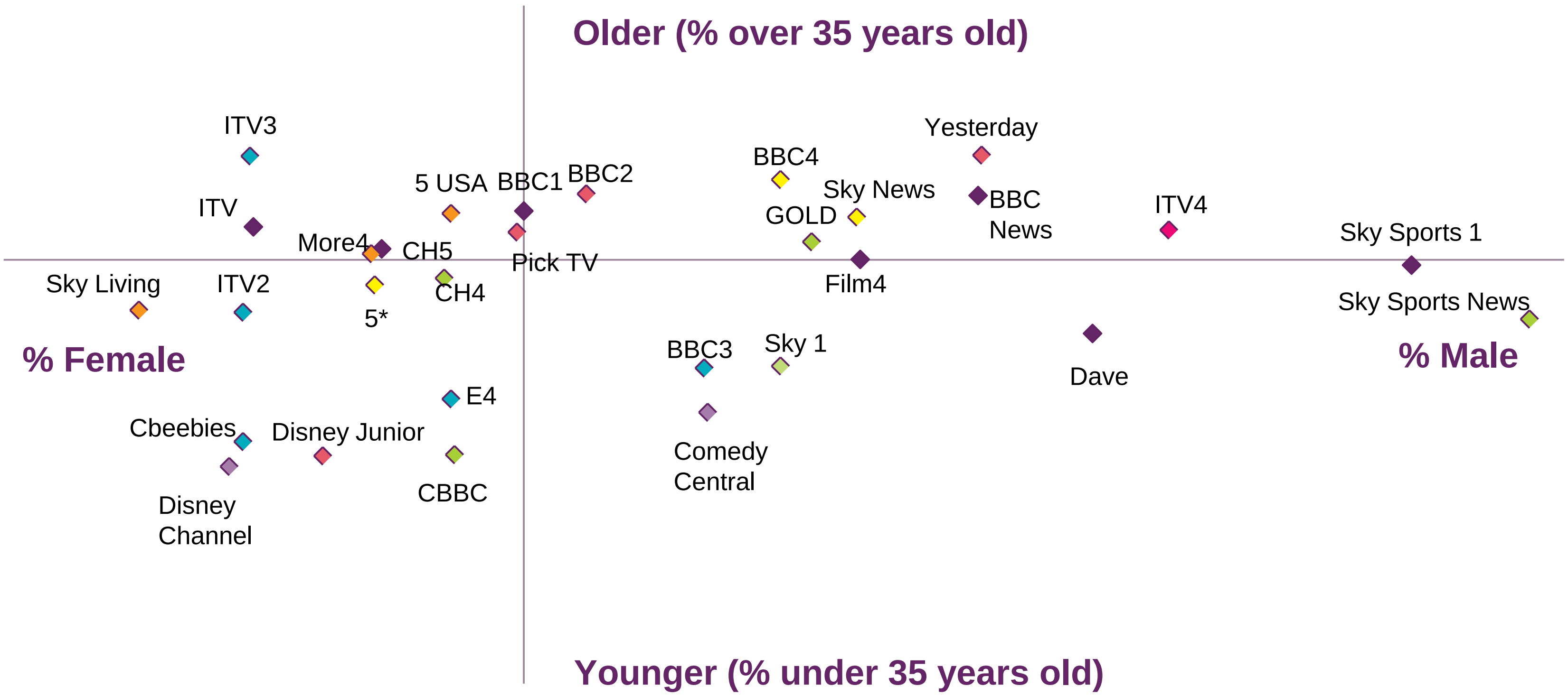
The top channels by share in multichannel homes: 2011 to 2012

	Share	Rank			Share	Rank	
Channel	2012	2012	2011	Channel	2012	2012	2011
BBC One	21.3%	1	1	CBeebies	1.2%	11	11
ITV	15.7%	2	2	More4	1.2%	12	12
Channel 4	6.5%	3	3	Sky Sports 1	1.2%	13	13
BBC Two	6.1%	4	4	ITV4	1.2%	14	15
Channel 5	4.5%	5	5	Dave	1.1%	15	16
ITV2	2.8%	6	6	BBC News	1.0%	16	14
ITV3	2.5%	7	7	5 USA	1.0%	17	19
E4	1.9%	8	8	Pick TV	1.0%	18	18
BBC Three	1.7%	9	9	Yesterday	1.0%	19	20
Film4	1.5%	10	10	Sky 1	1.0%	20	17

Source: BARB.
Note: Includes channels' +1 services. HD and SD viewing included

Figure 2.78

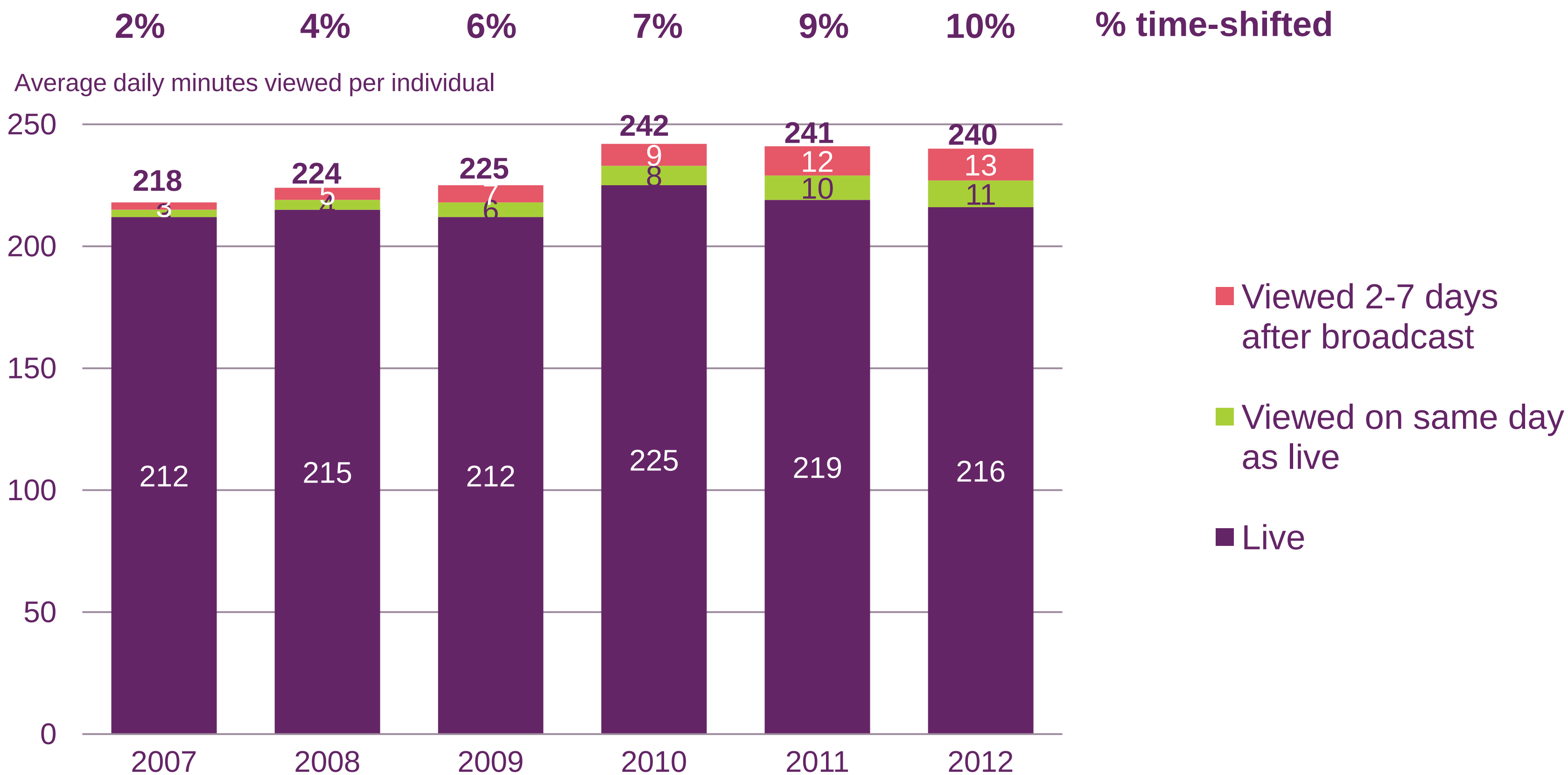
Age and gender profile of the 30 most viewed channels in multichannel homes, 2012



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

Figure 2.79

Live versus time-shifted viewing, all homes



Source: BARB, all individuals. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Time-shifted viewing defined as total minutes of viewing on same day as live (VOSDAL) + Viewing 2-7 days after broadcast (Coded Playback). All viewing (via a TV set) of broadcast content viewed within 7 days after broadcast is reported by BARB. This will include viewing to catch-up TV services and content viewed via player services such as BBC iPlayer, ITV Player, 4OD etc

Figure 2.80

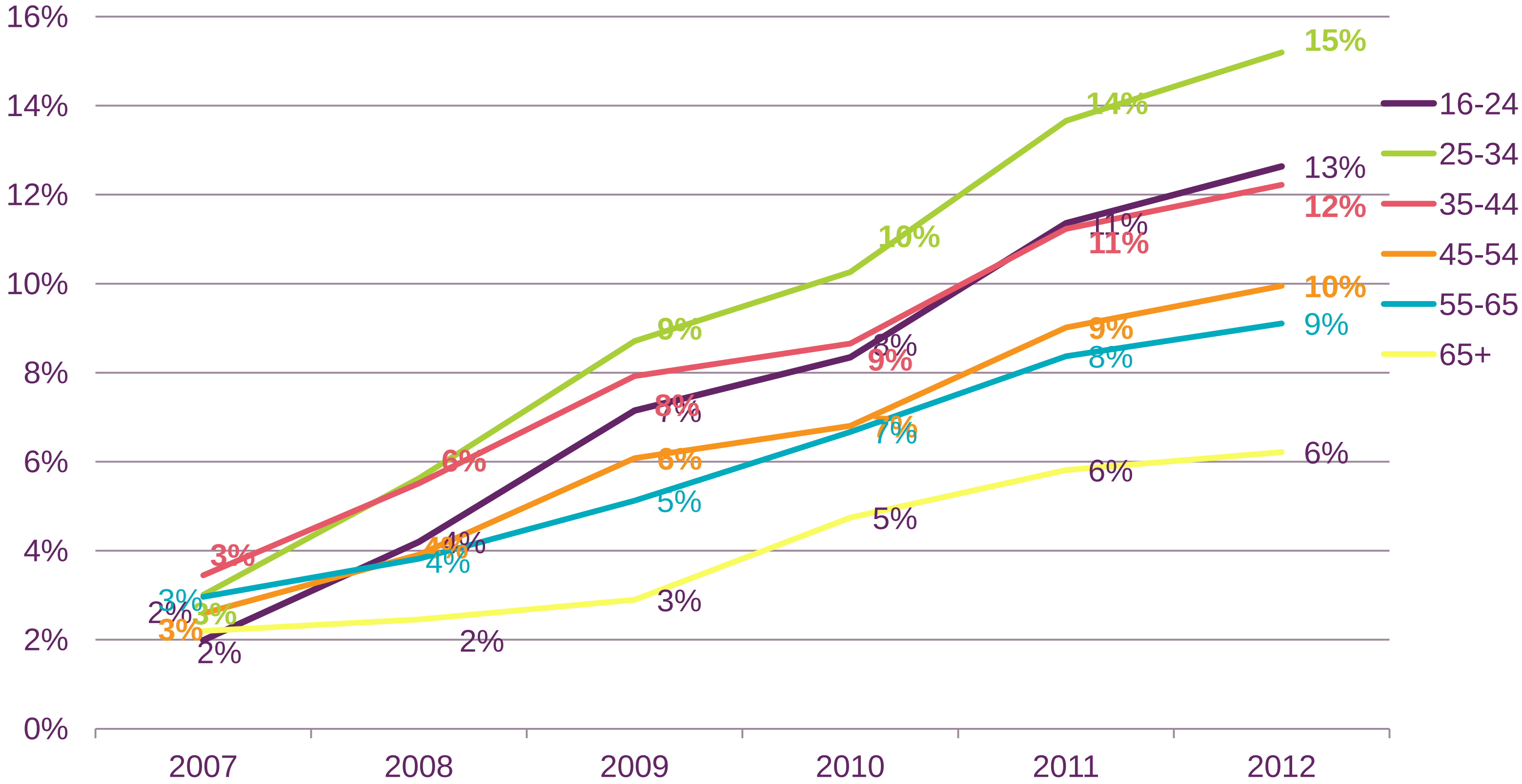
Live versus time-shifted viewing: DVR homes

Source: BARB, DVR owners (individuals), all homes. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Time-shifted viewing is defined as total minutes of viewing on same day as live (VOSDAL) + Viewing 2-7 days after broadcast (Coded Playback). All viewing (via a TV set) of broadcast content viewed within 7 days after broadcast is reported by BARB. This will include viewing to catch-up TV services and content viewed via player services such as BBC iPlayer, ITV Player, 4OD etc.

Figure 2.81

Proportion of time shifted viewing, by age: all Adults

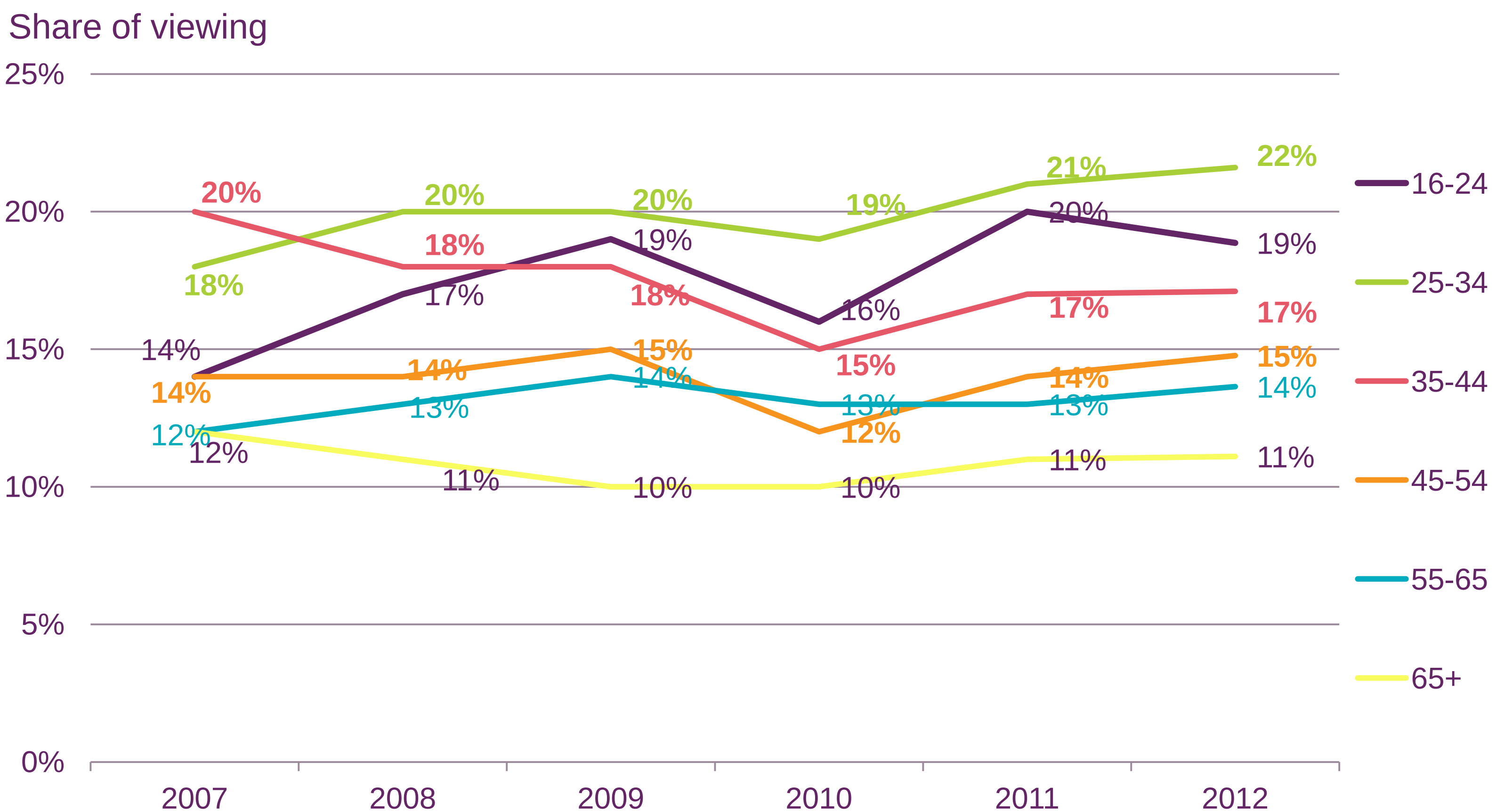
Share of viewing



Source: BARB, all Individuals, based on total minutes. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.82

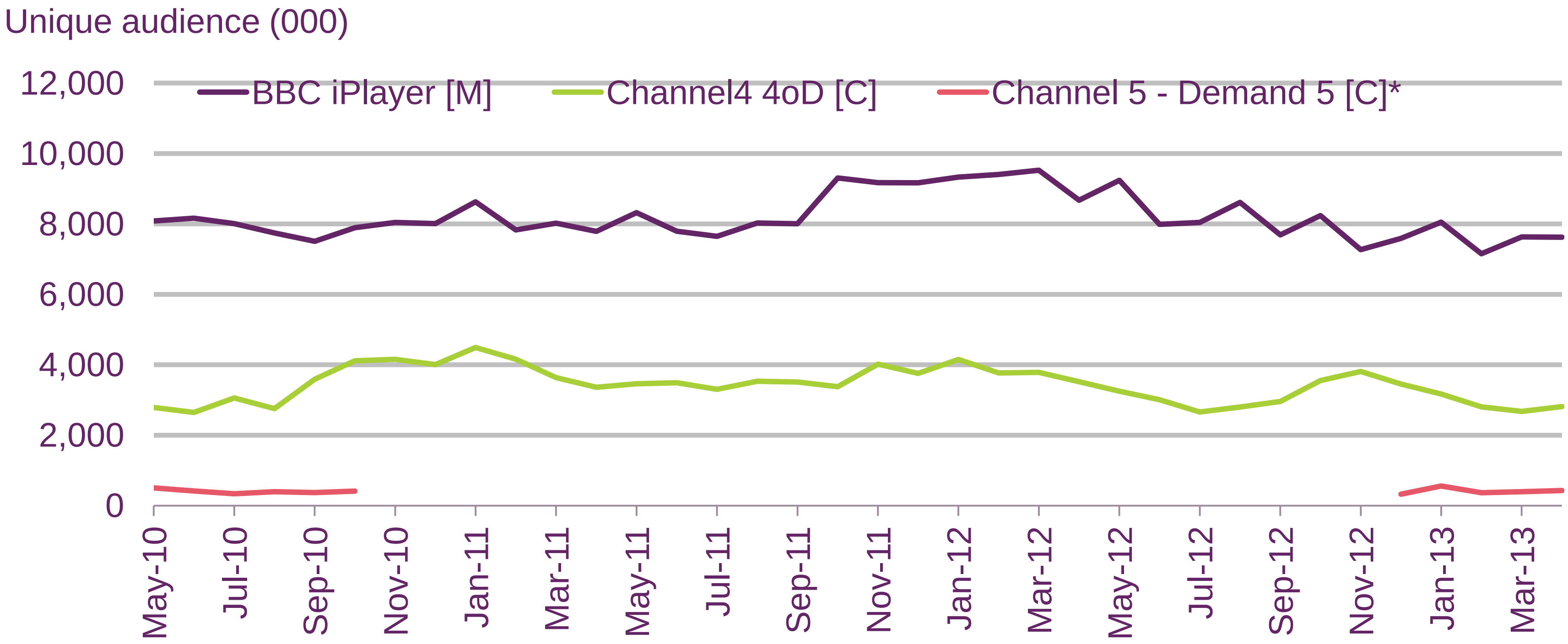
Proportion of time shifted viewing, by age: DVR Adults



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

Figure 2.83

Unique audience of online catch-up services on PC/laptop

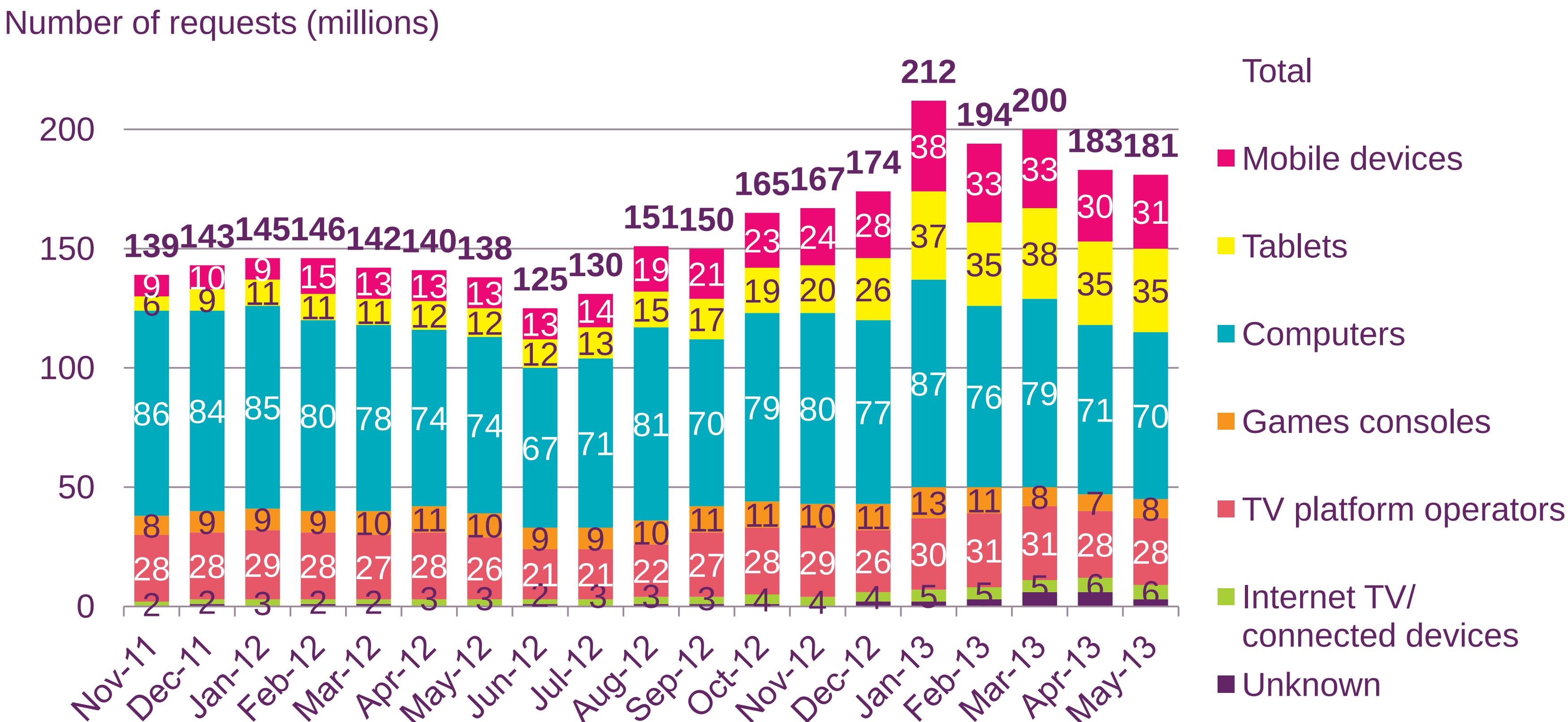


Source: comScore MMX, home and work panel, May 2010 to April 2013
Notes: * Between May-10 and Oct-10 data is reported as Five – Demand Five [C], a subsidiary of the RTL Group; data between Nov-10 and Nov-12 is unavailable; from Dec-12 onwards data is reported as Channel 5 – Demand 5 [C], a subsidiary of the Northern & Shell Network.

Ofcom

Figure 2.84

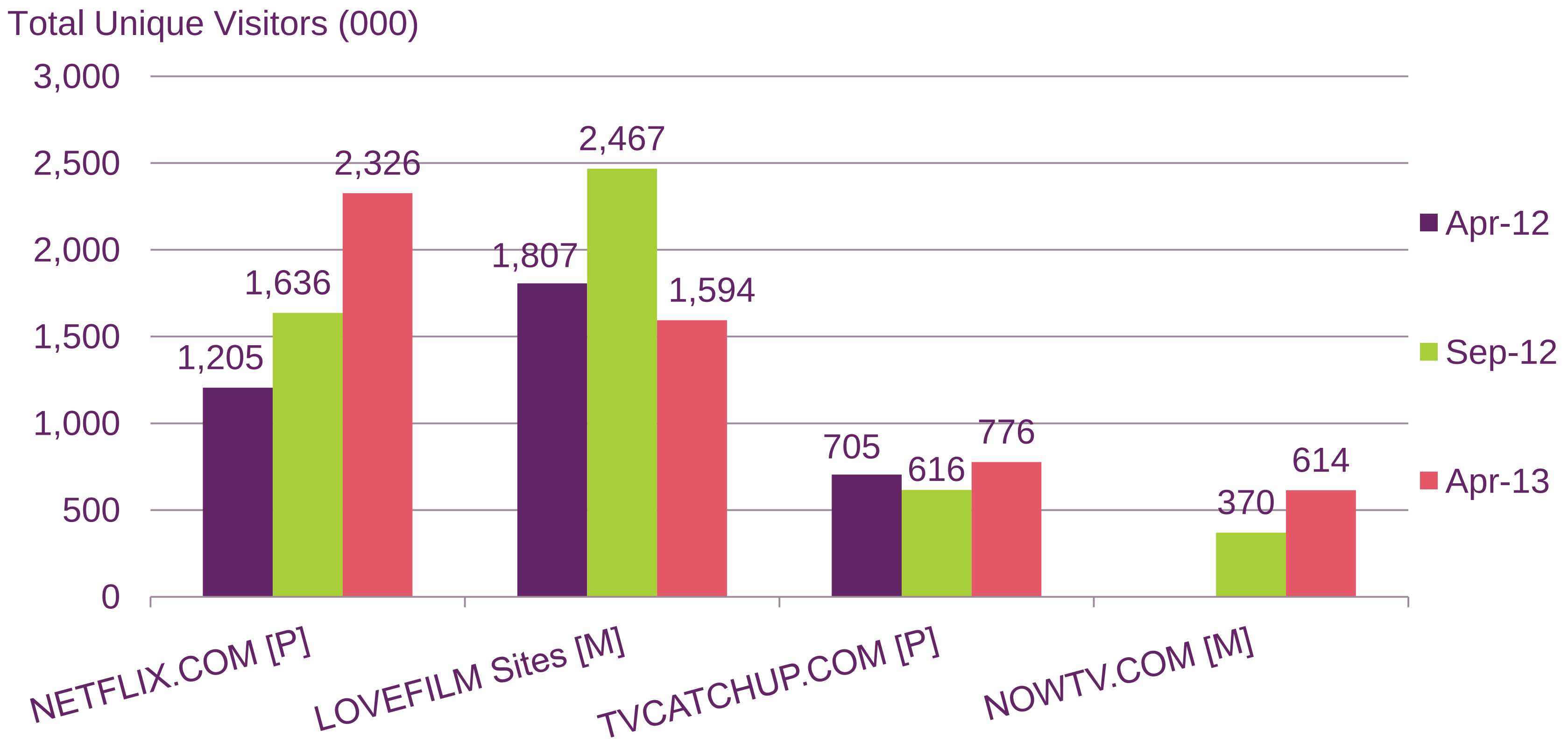
Requests for programmes across BBC iPlayer by device type – TV only



Source: BBC. Note: Internet TV / connected devices include Freeview and Freesat smart TVs, set-top-boxes and devices like Roku and blu-ray DVD players. TV platform operators include Virgin Media and BT Vision. Games consoles comprise Sony PS3, Nintendo Wii and Microsoft XBox 360. An update in iStats AV means that PS3 devices were incorrectly classified as unknown devices from week commencing 18th February 2013.

Figure 2.85

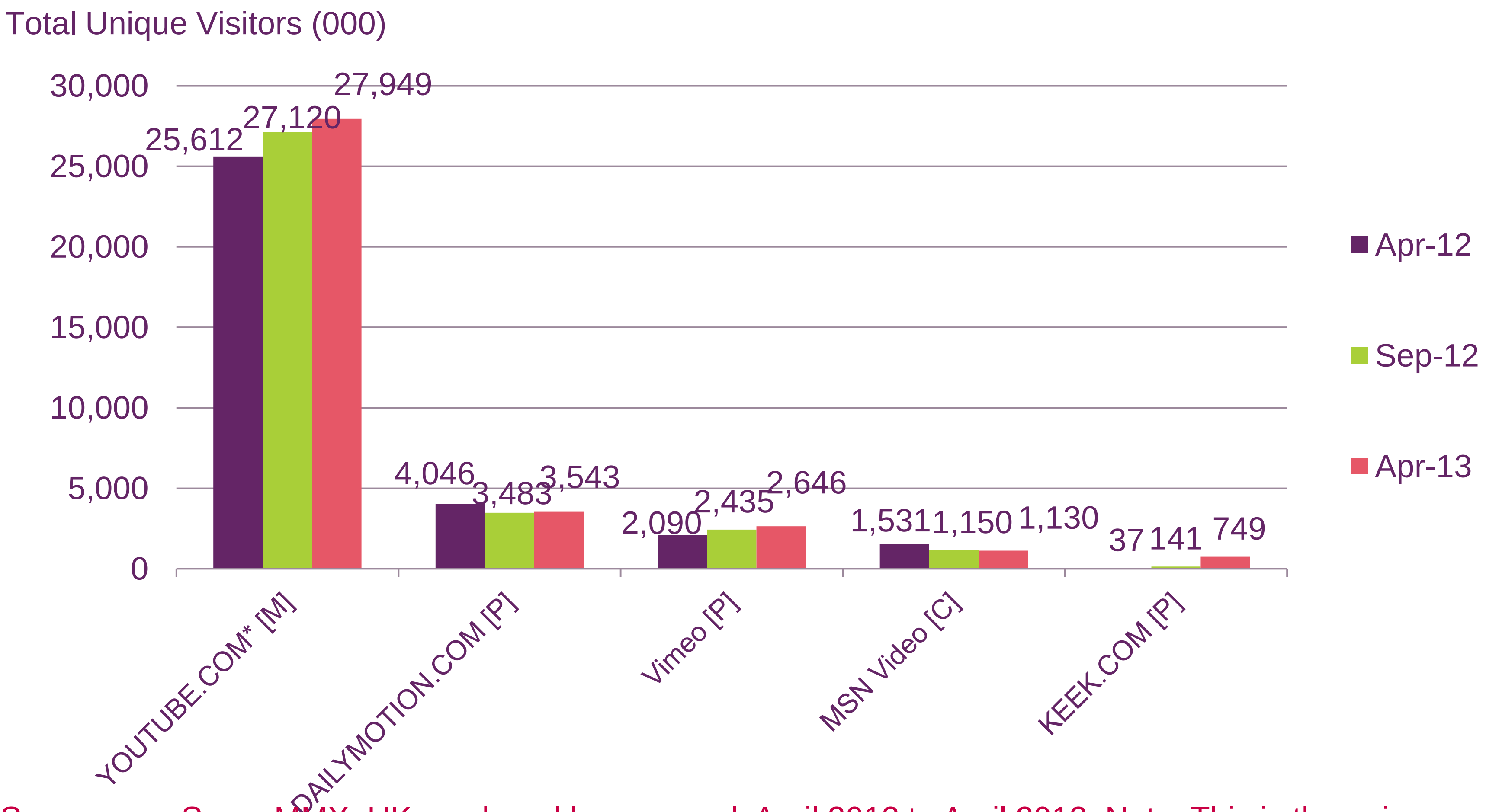
Total unique visitors to selected online film and TV streaming sites



Source: comScore MMX, UK, work and home panel, April 2012 to April 2013. Note: This is the unique audience for laptop and desktop computers only. MMX Legend: [P] Property, [M] Media Title, [C] Channel.

Figure 2.86

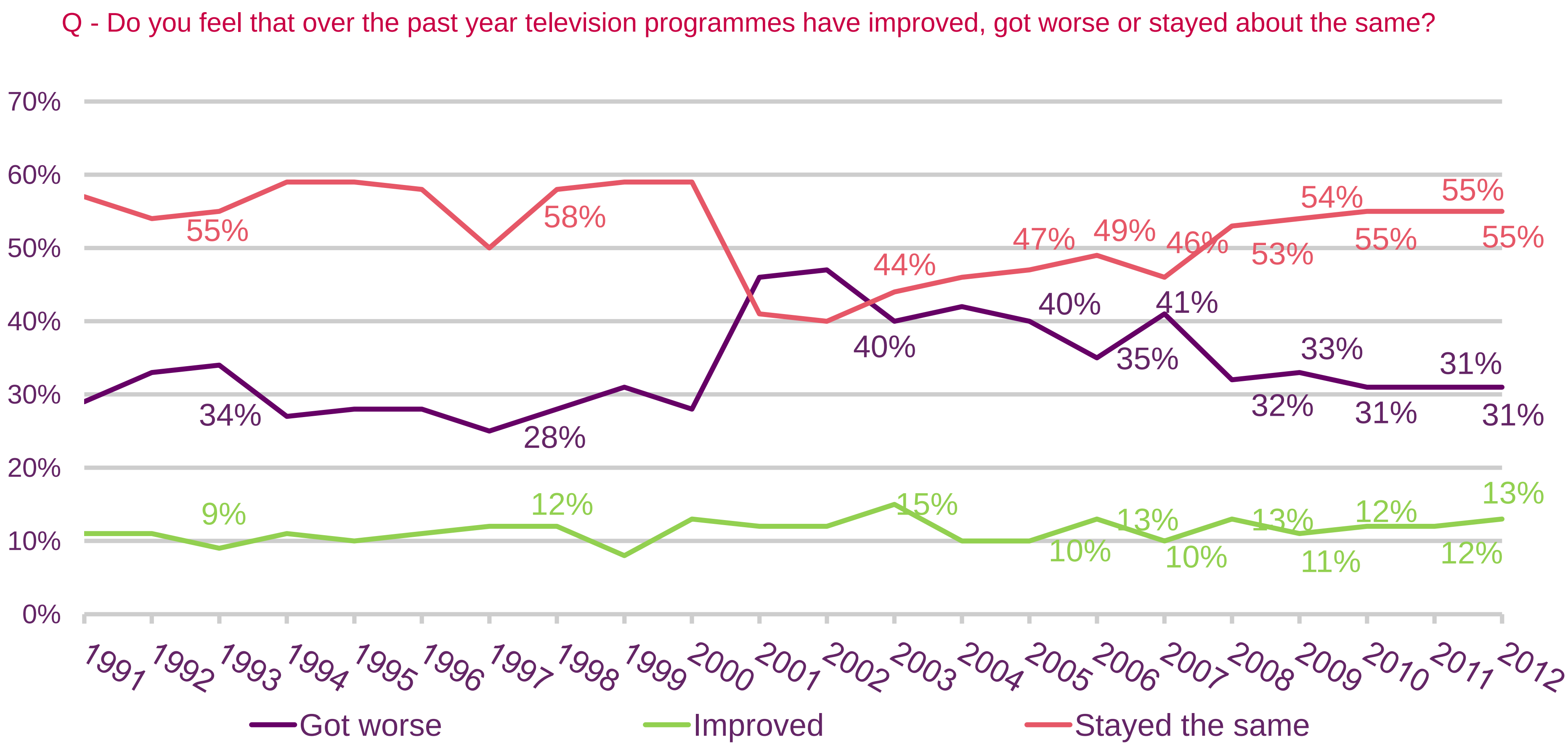
Total unique visitors to selected video sharing sites



Source: comScore MMX, UK, work and home panel, April 2012 to April 2013. Note: This is the unique audience for laptop and desktop computers only. MMX Legend: [P] Property, [M] Media Title, [C] Channel.

Figure 2.87

Opinion on programme standards over the last 12 months

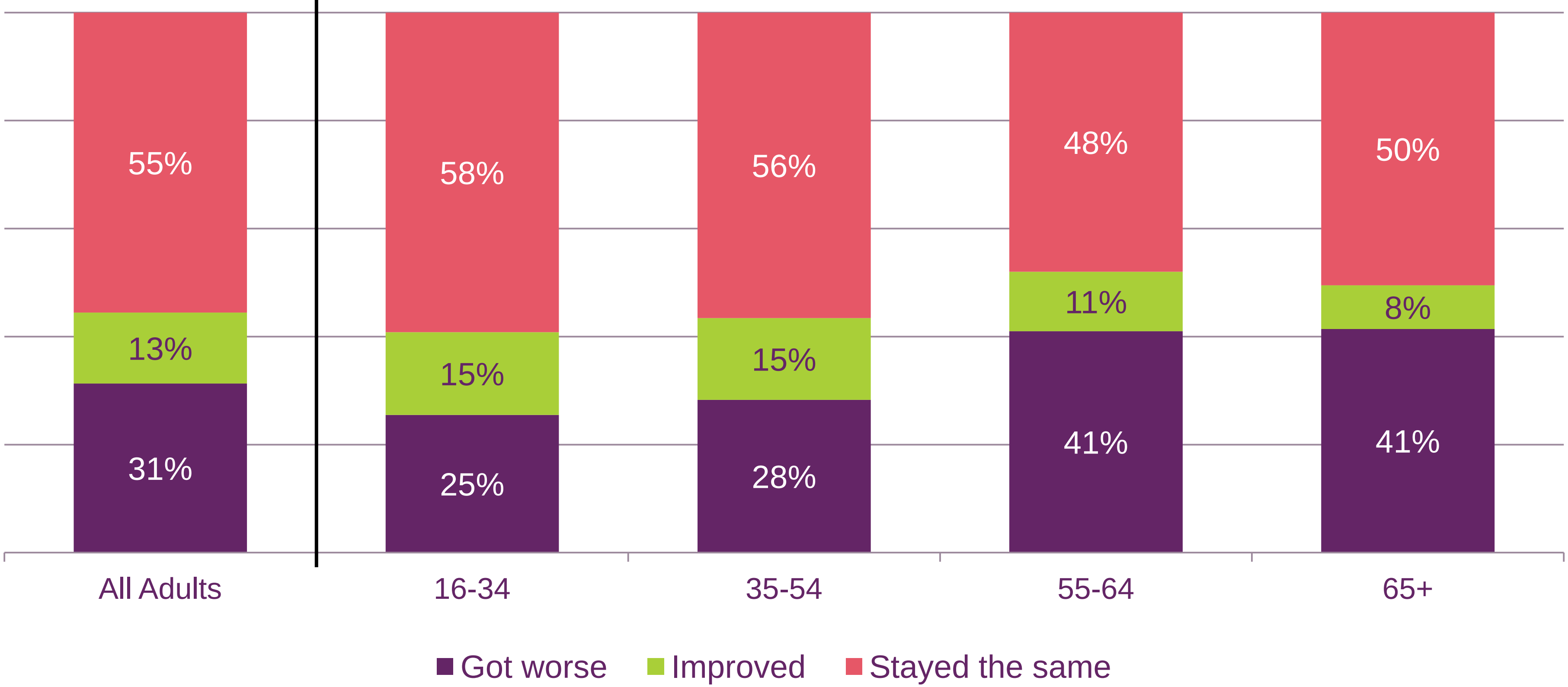


Source: Ofcom Media tracker 2012. Base: All with TV, but excluding those never watching (1,830).

Figure 2.88

Opinion on programme standards over the last 12 months, by age

Q - Do you feel that over the past year television programmes have improved, got worse or stayed about the same?

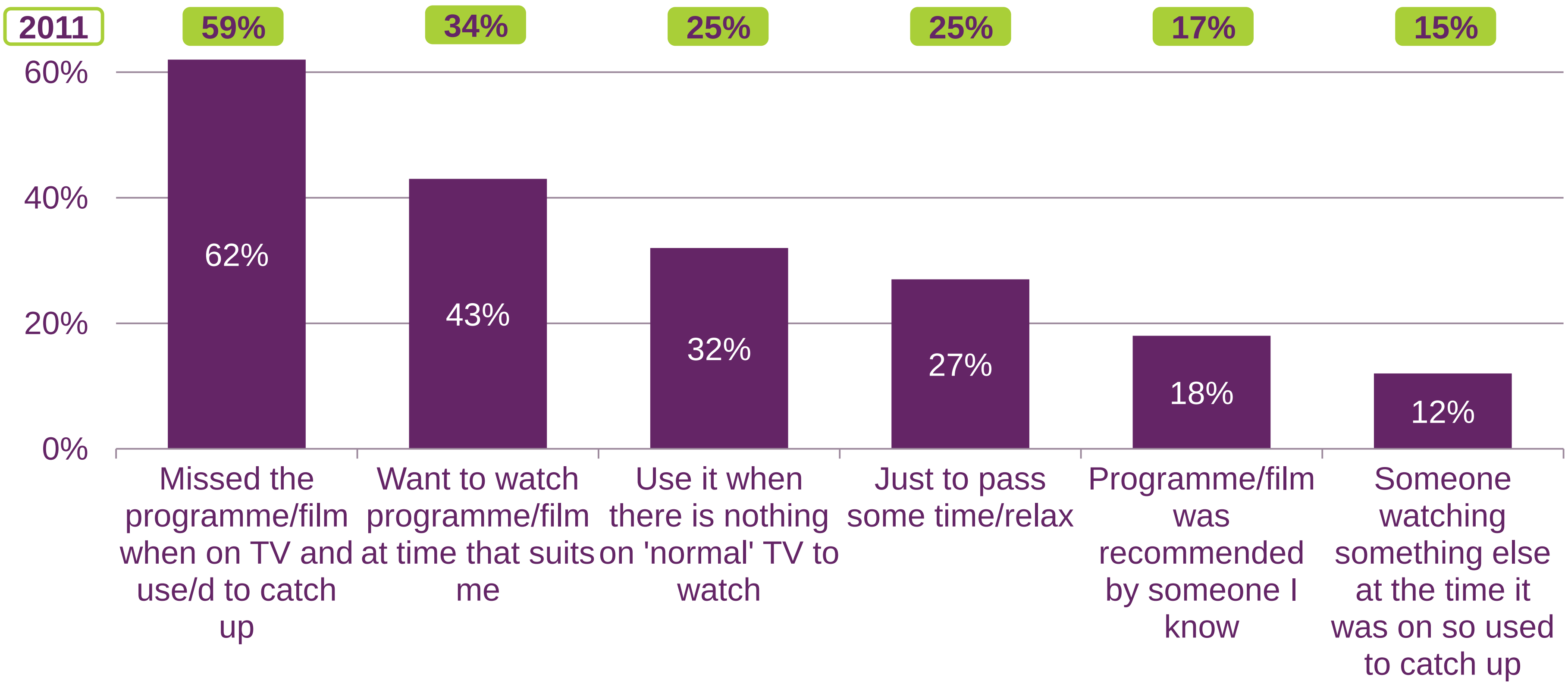


Source: Ofcom Media tracker 2012. 'Don't know' responses not charted.
Base: All with TV, but excluding those never watching (1,830); 16-34 (609); 35-54 (640); 55-64 (247); 65+ (334).

Figure 2.89

Reasons for online on demand use: 2012

Q - What would you say are the reasons you use/ used your on demand service, whether you were catching up or accessing other content?



Source: Ofcom Media tracker 2012. Base: All who use online ‘video on demand’ 2012 (725), 2011 (658).
Note: Only responses ≥ 10% charted. All responses unprompted.