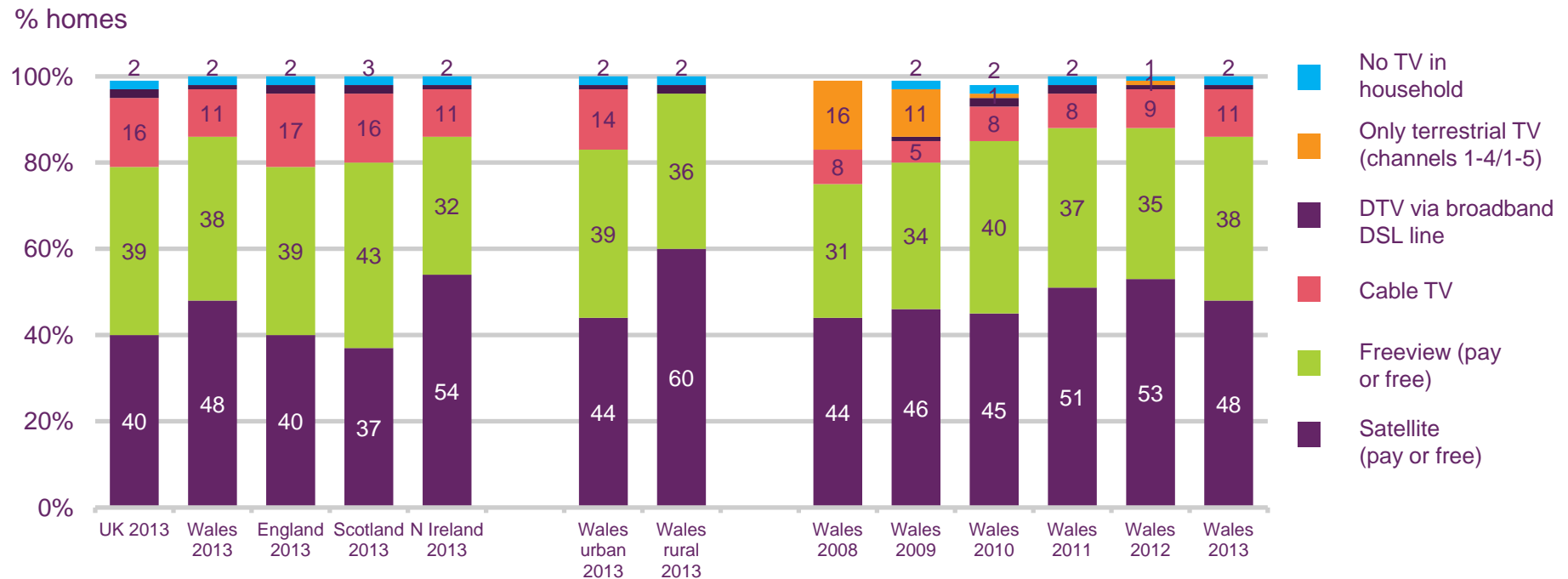


Figure 2.1 Main television set share, by platform

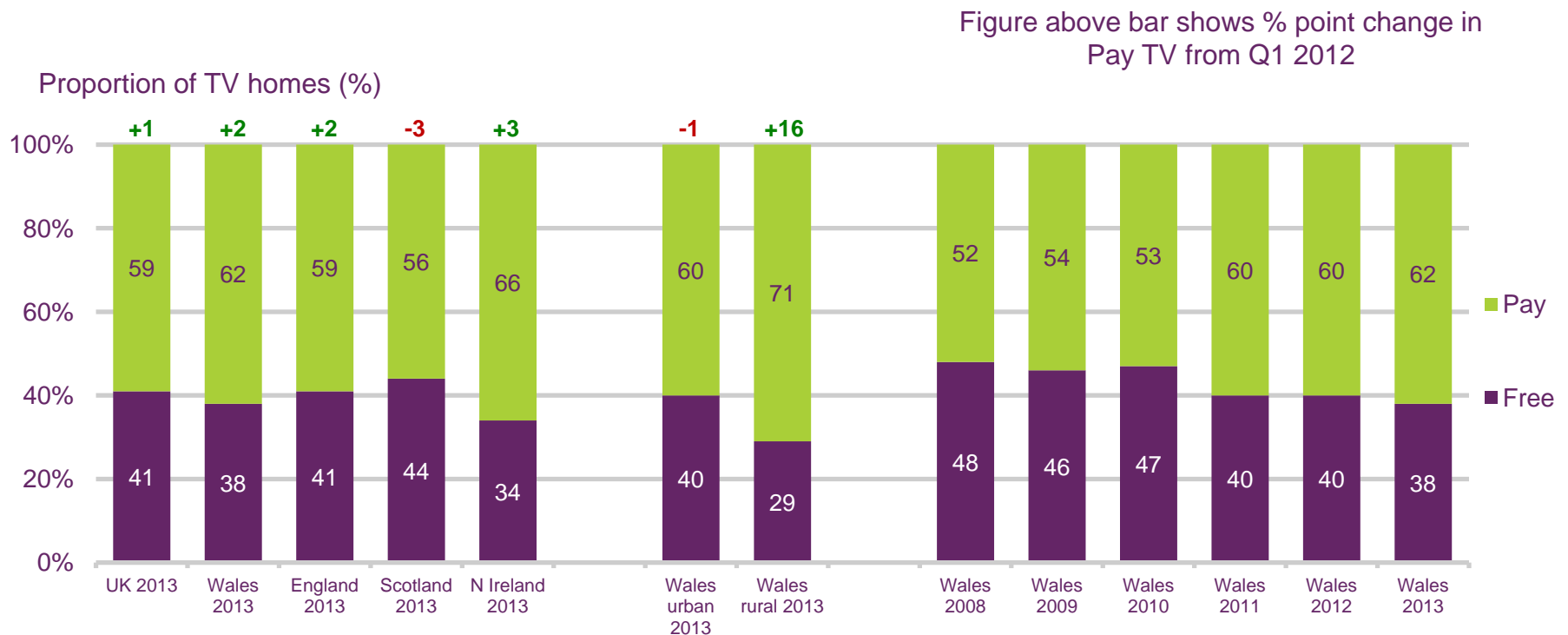


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 492 Wales, 2250 England, 501 Scotland, 507 Northern Ireland, 247 Wales urban, 245 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013)

Figure 2.2 Proportion of homes with HD television

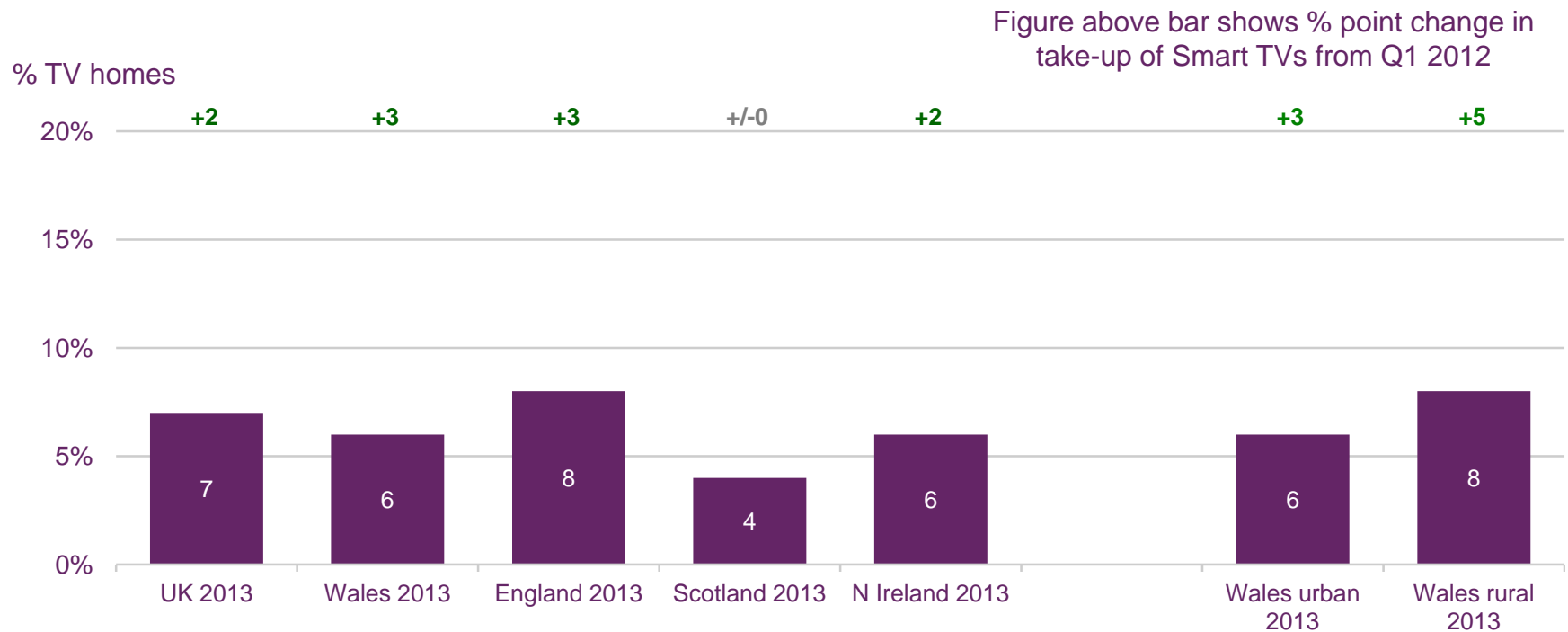


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ with a TV in household (n = 3661 UK, 485 Wales, 2197 England, 487 Scotland, 492 Northern Ireland, 243 Wales urban, 242 Wales rural, 797 Wales 2008, 970 Wales 2009, 1060 Wales 2010, 483 Wales 2011, 508 Wales 2012, 485 Wales 2013)

Figure 2.3 Smart TV take-up in Wales



QH18. Are any of your TV sets “Smart TVs”? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ with a TV in household (n = 3661 UK, 485 Wales, 2197 England, 487 Scotland, 492 Northern Ireland, 243 Wales urban, 242 Wales rural)

Figure 2.4 Average hours of daily TV viewing, by nation: 2012

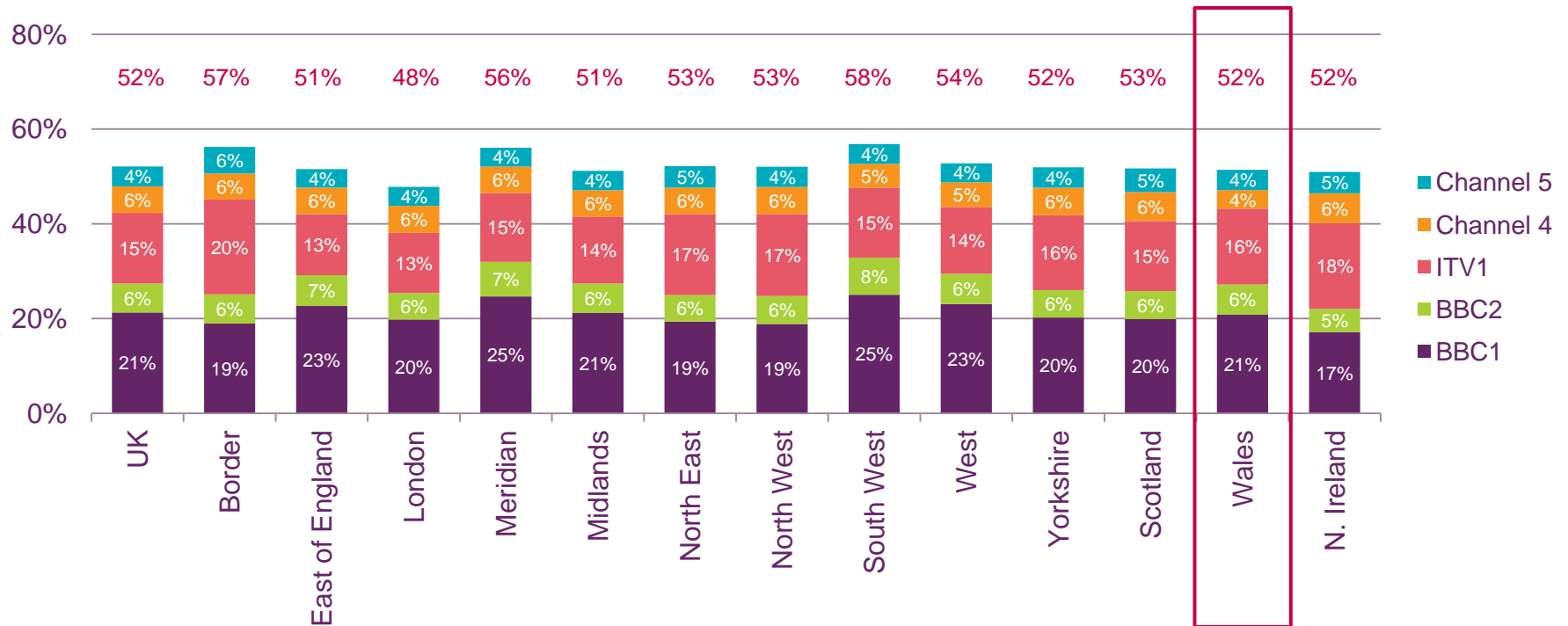
Hours per person per day



Source: TV = BARB. Based on all individuals (aged 4+). PSBs = BBC One, BBC Two, ITV1, C4, Channel 5 including HD variants.
***Note: This figure reflects the average across the English regions with the highest in North East (4.4) and lowest in West (3.7) respectively.**

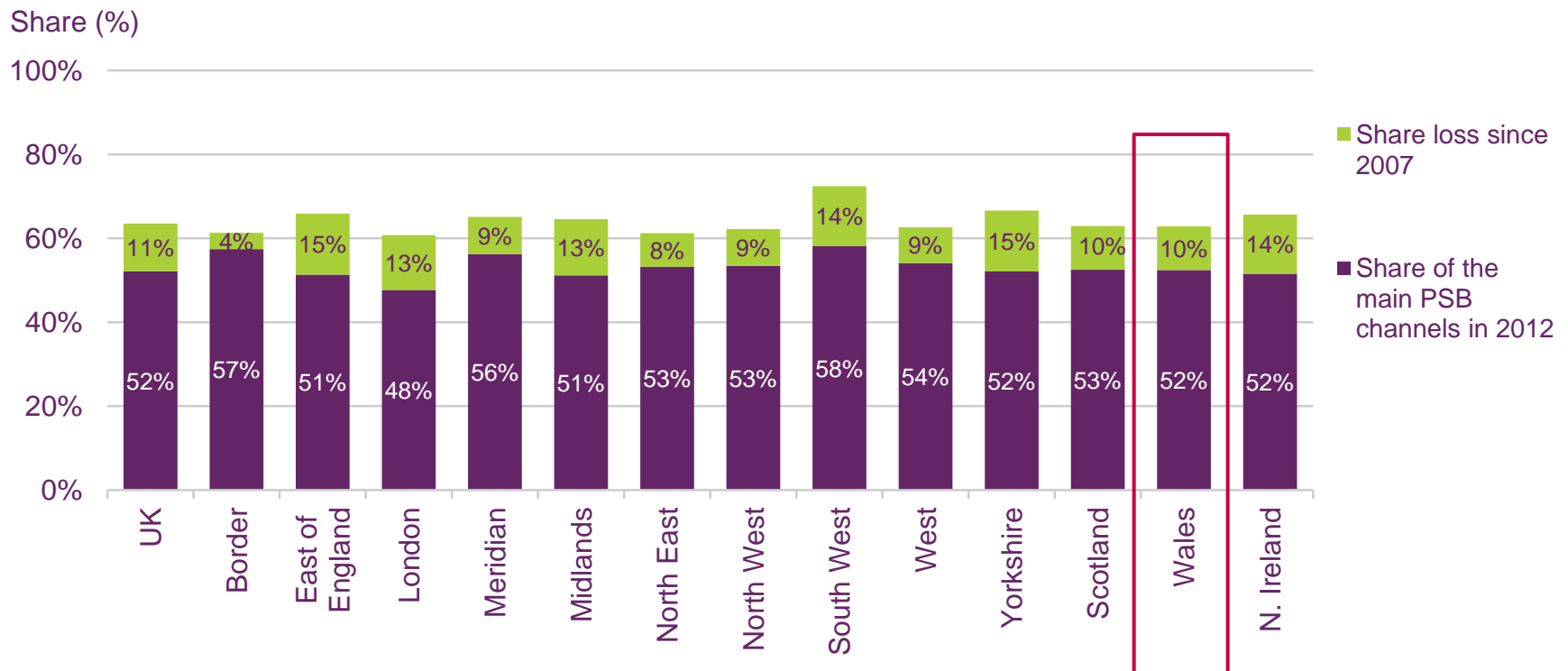
Figure 2.5 Share of the five main PSB channels, all homes: 2012

Audience share (%)



Source: BARB, all individuals (4+). HD channel variants are included.

Figure 2.6 Reduction in combined share of the five main PSB channels, all homes: 2007 and 2012

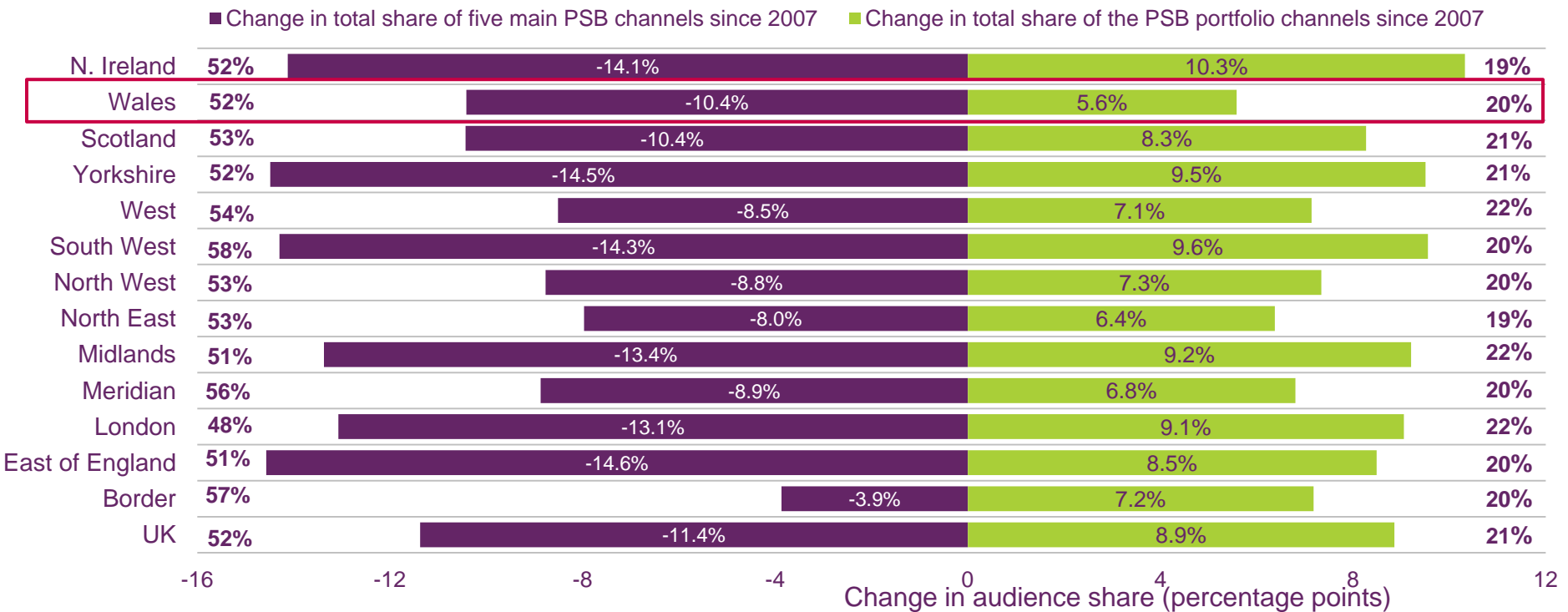


Source: BARB, all individuals (4+). HD channel variants are included.

Note : In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre and post panel change data should be compared with some caution.

Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. S4C is included in the main PSB channels in 2007 but not in 2012.

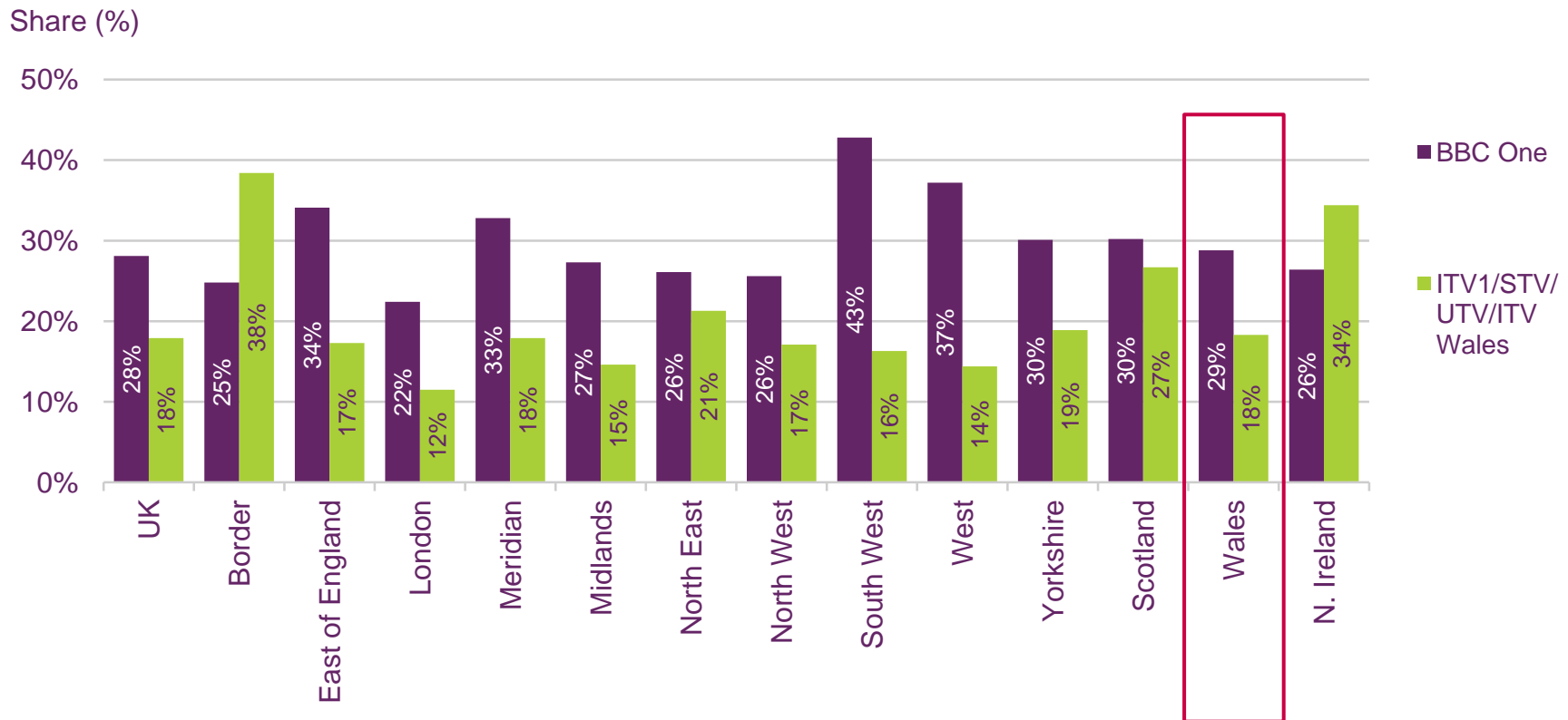
Figure 2.7 Net change in the audience share of the five main PSB channels and their portfolio channels, all homes: 2007 - 2012



Source: BARB, all individuals (4+)

Notes: i) PSB main channels include HD variants but not +1s. 'PSB portfolio channels' include main PSB +1 channels and the PSB digital channels and their respective +1s). ii) In 2010 C4 and S4C became two separate channels following digital switchover in Wales. S4C is included in the main PSB channels in 2007 but not in 2012. iii) In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre and post panel change data should be compared with some caution.

Figure 2.8 BBC One and ITV1/STV/UTV/ITV Wales early evening news bulletin shares, all homes: 2012

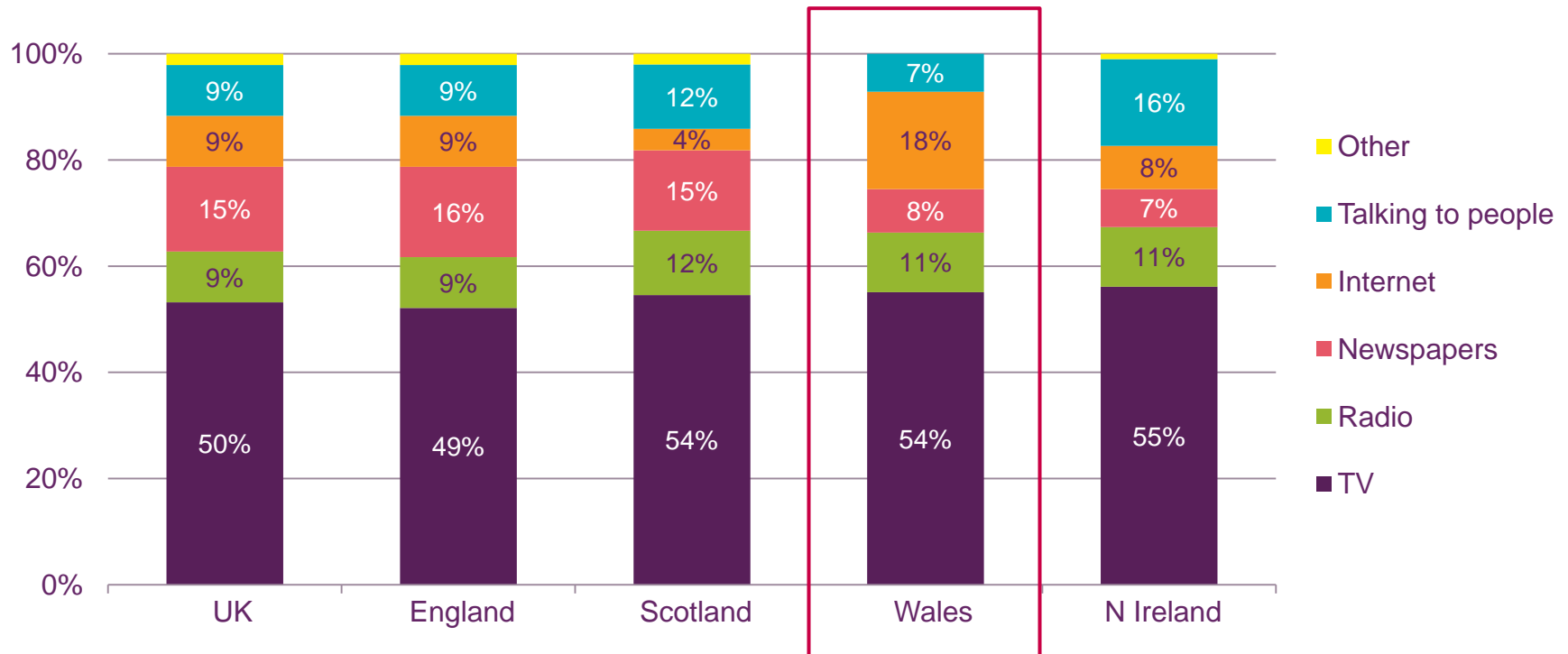


Source: BARB, all individuals (4+)

Note: Based on Regional News prog, start time 17:55-18:35, 10mins+ duration, BBC1 & ITV (exc HD), weekdays. UK share for ITV includes HD.

Figure 2.9 Main sources of local news for each nation

‘Can you tell me what, if anything, is your main source of news about what is going on in your own local area’



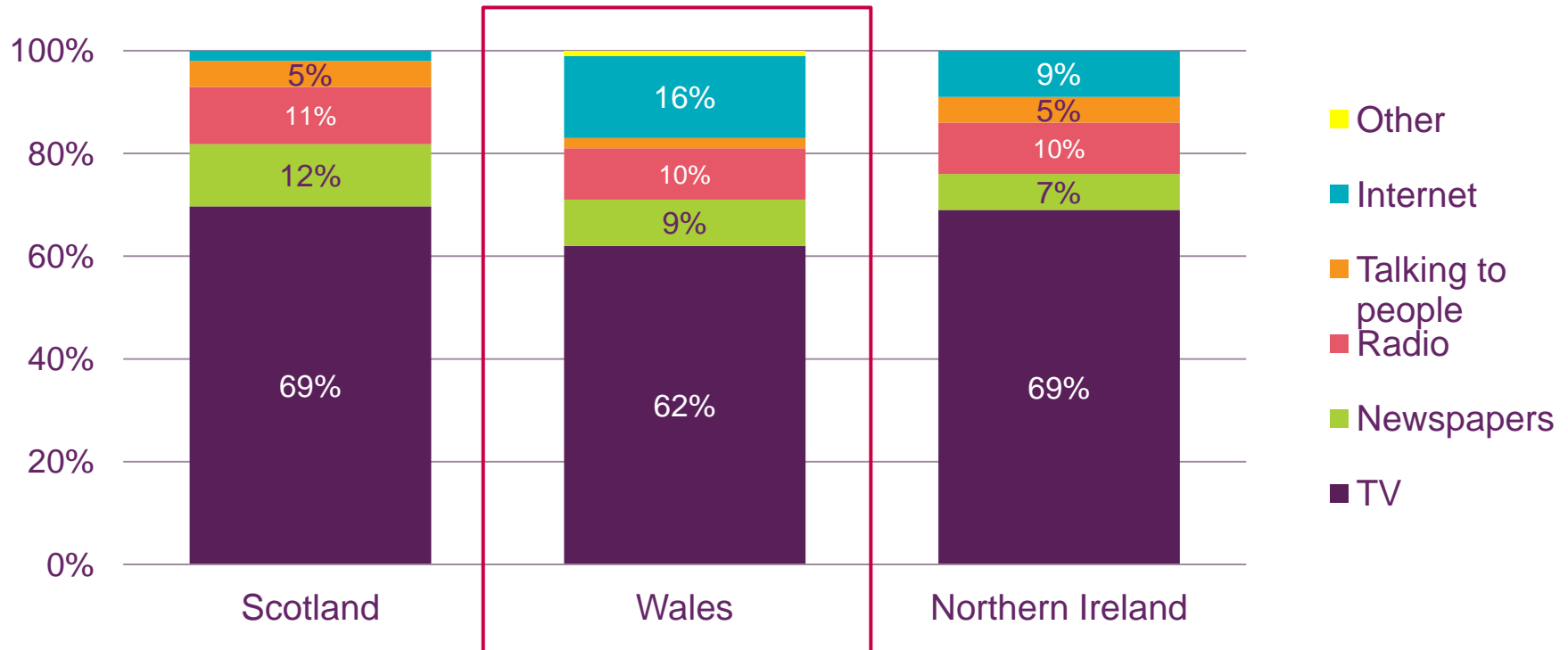
Source: Ofcom Media tracker 2012.

Base: All adults; England (1,434); Scotland (189); Wales (118); Northern Ireland (113).

Only responses $\geq 3\%$ labelled

Figure 2.10 Main sources of Nations news for each nation

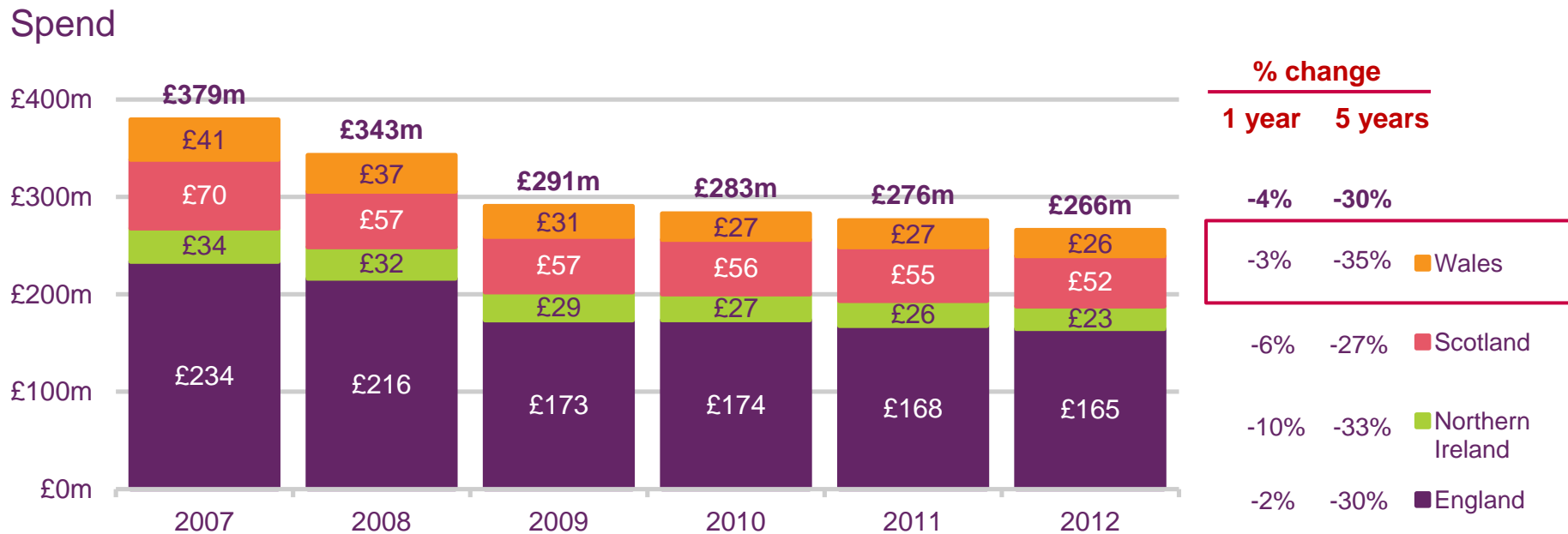
‘Can you tell me what, if anything, is your *main* source of news about what is going on in [Scotland, Wales, Northern Ireland]?’



Source: Ofcom Media tracker.

Base: All respondents in Scotland (189), Wales (118), Northern Ireland (113). Only responses $\geq 3\%$ labelled.

Figure 2.11 Spend on first-run originated nations' and regions' output by the BBC/ITV1/STV/UTV



Source: Broadcasters. All figures expressed in 2012 prices.

Note: Spend data for first-run originations only. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for total spend on BBC Alba or BBC spend on S4C output.

Figure 2.12 Change in total spend, by genre and nation, 2007 - 2012

	UK		England		N. Ireland		Scotland		Wales	
	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)
Current Affairs	-5%	-28%	-8%	-36%	5%	-28%	-3%	6%	-5%	-31%
News	-3%	-22%	-1%	-21%	-2%	-21%	-13%	-32%	-14%	-22%
Non-news/non-current affairs	-5%	-43%	7%	-86%	-19%	-41%	-5%	-27%	8%	-40%
Total Spend in 2012	£271m		£168m		£23m		£53m		£27m	

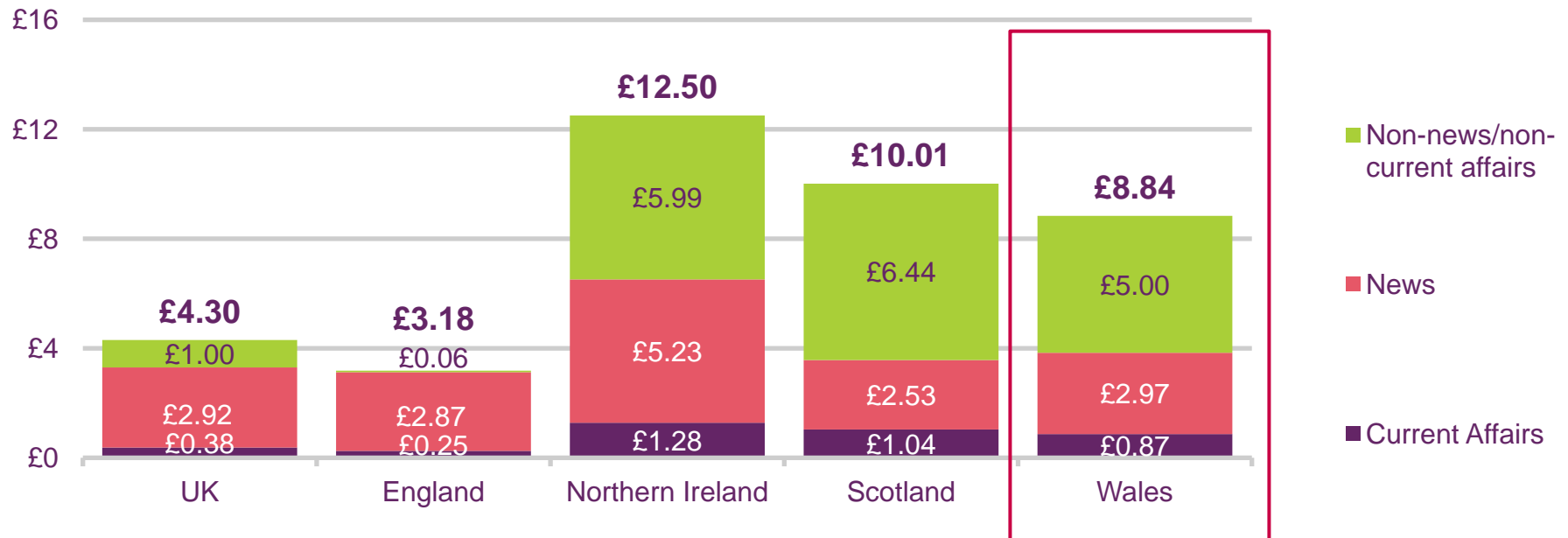
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	-4%	-29%	-2%	-28%	-10%	-33%	-7%	-26%	-2%	-34%

Source: Broadcasters. All figures expressed in 2012 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for total spend on BBC Alba or BBC spend on S4C output.

Figure 2.13 Total spend per head by the BBC/ITV1/STV/UTV in nations/regions output: 2012

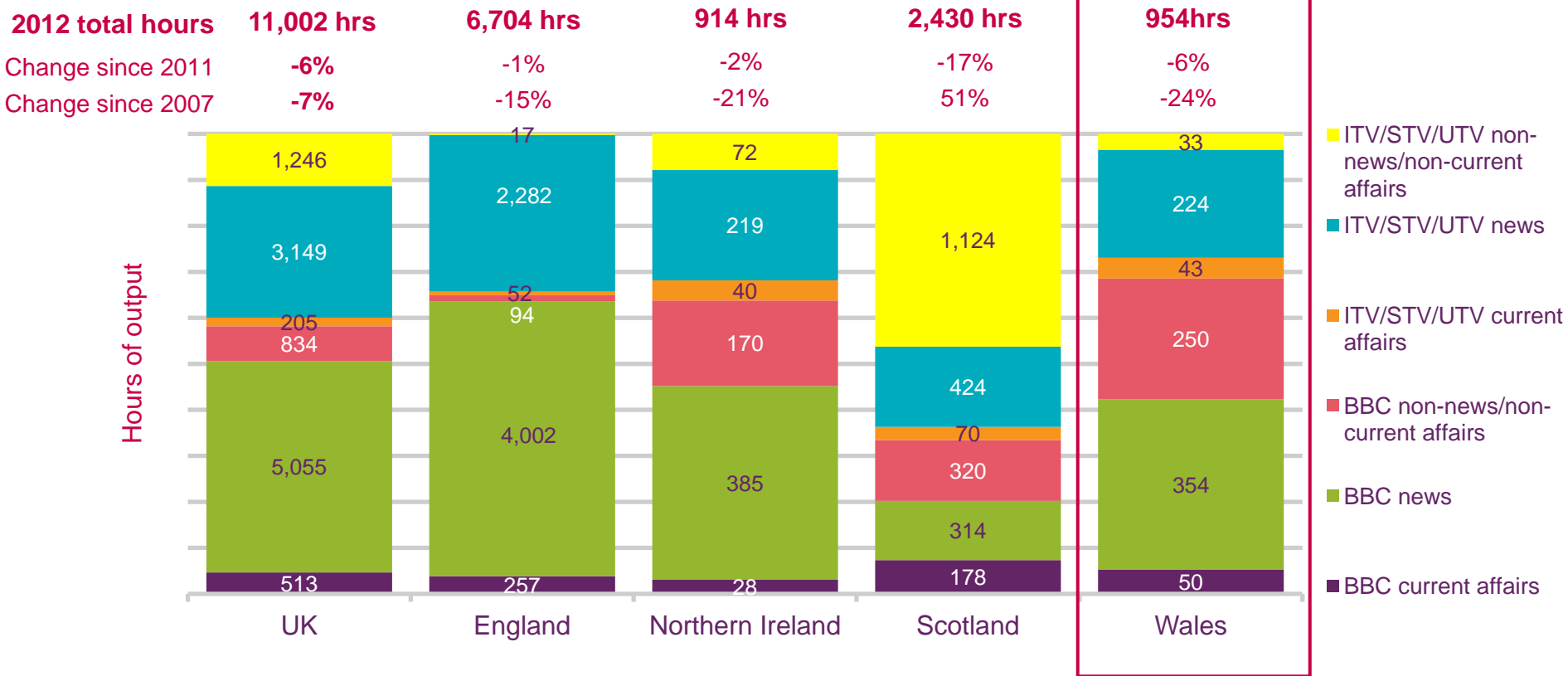
Spend per head



Source: Broadcasters. All figures expressed in 2012 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for total spend on BBC Alba or BBC spend on S4C output.

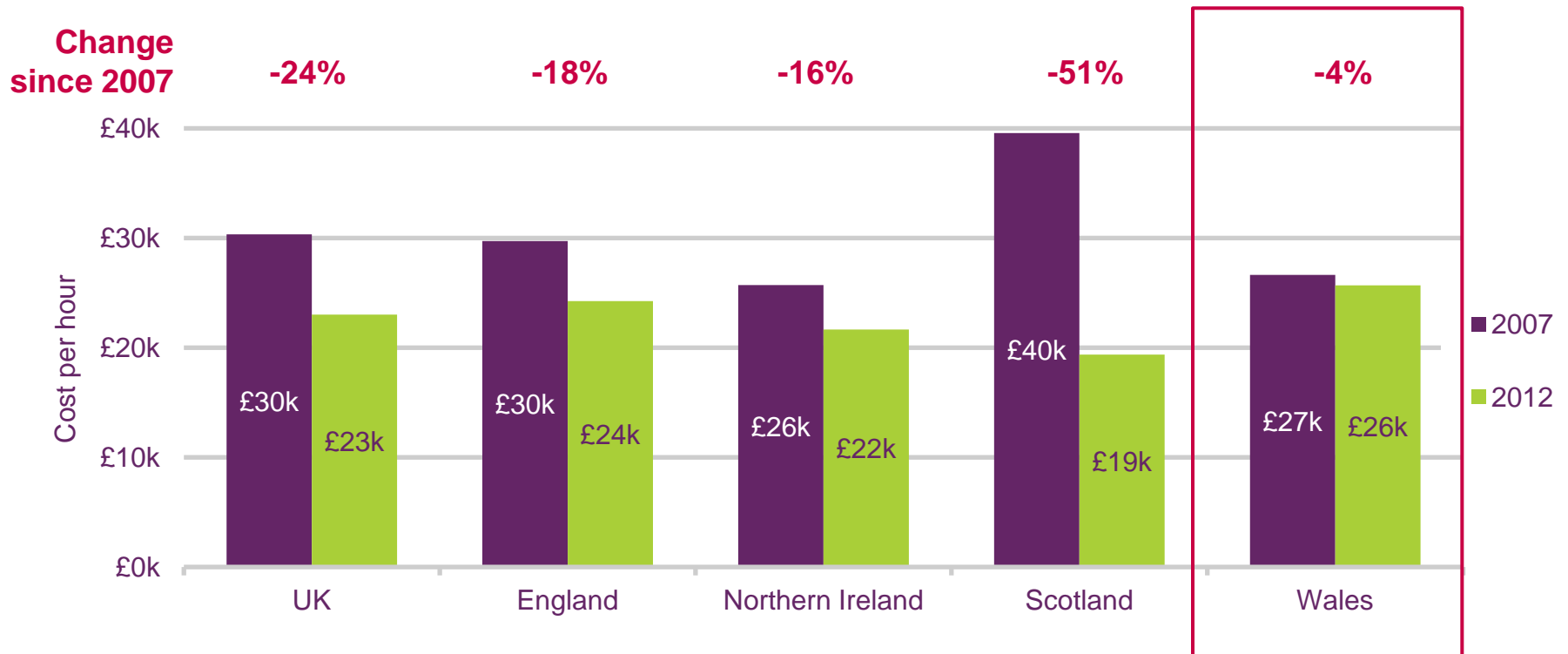
Figure 2.14 First-run originated hours of nations/regions output, by genre and broadcaster: 2012



Source: Broadcasters.

Note: Hours excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not include total hours for BBC Alba or BBC hours on S4C output.

Figure 2.15 Total output cost per hour, by nation: 2007 – 2012

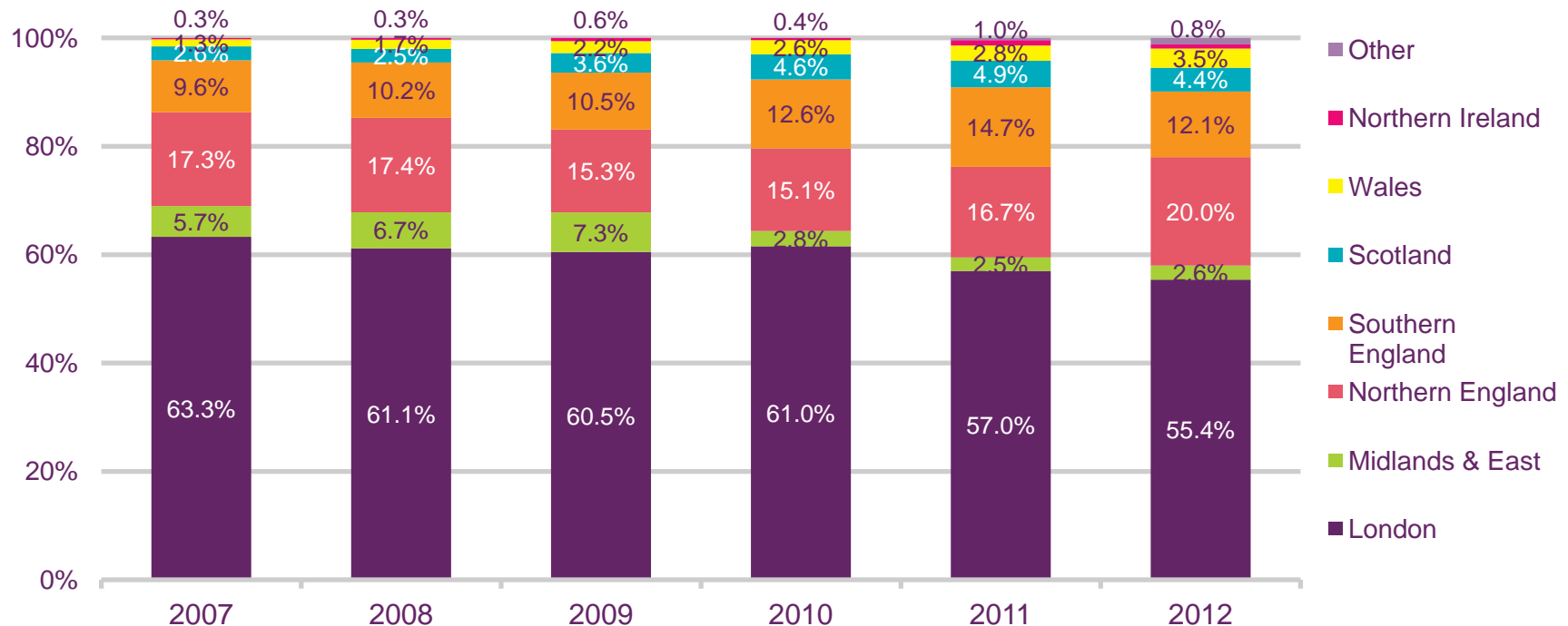


Source: Broadcasters. All figures expressed in 2012 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for total spend on BBC Alba or BBC spend on S4C output.

Figure 2.16 Expenditure on originated network productions: 2007-2012

Percentage of production by value

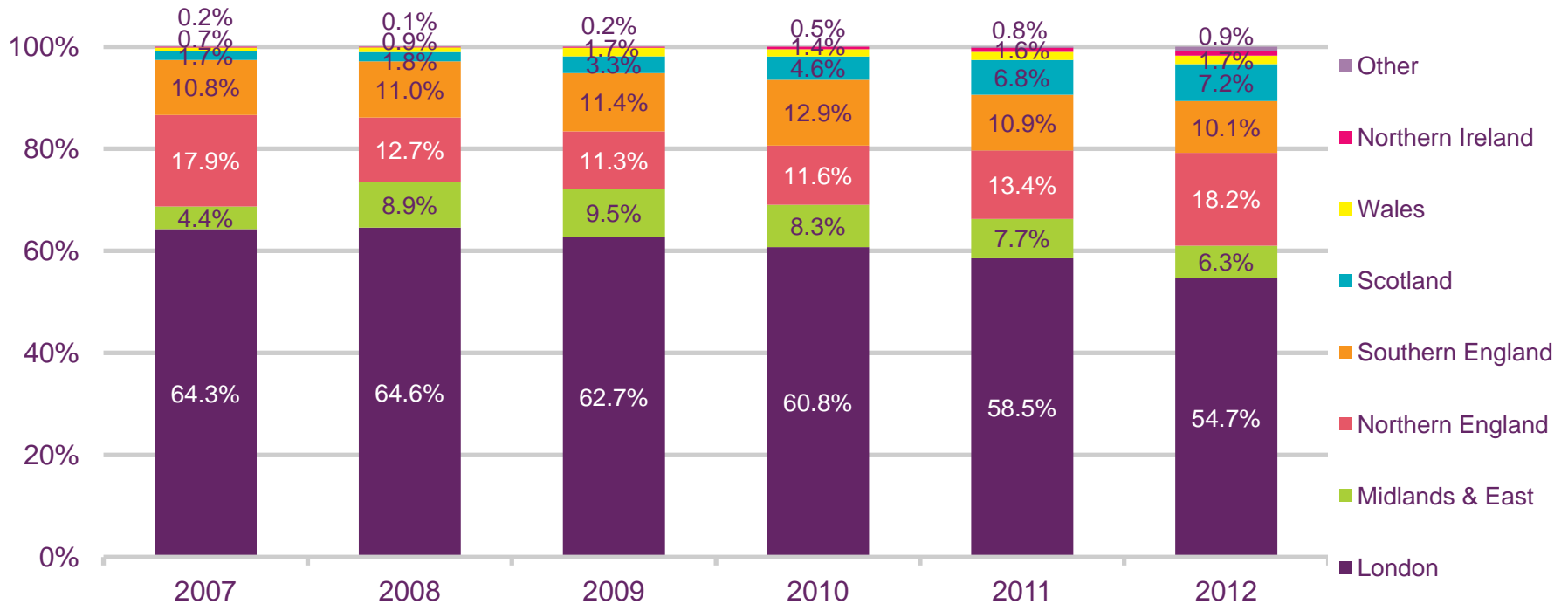


Source: Ofcom/broadcasters

Note: A new category 'Multi Nation/Region production' has been created for Regional Productions from London Producers which do not meet both 70% of spend and 50% of talent in any one particular Macro Region' See http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on Ofcom website for further details.

Figure 2.17 Volume of originated network productions: 2007-2012

Percentage of production by volume

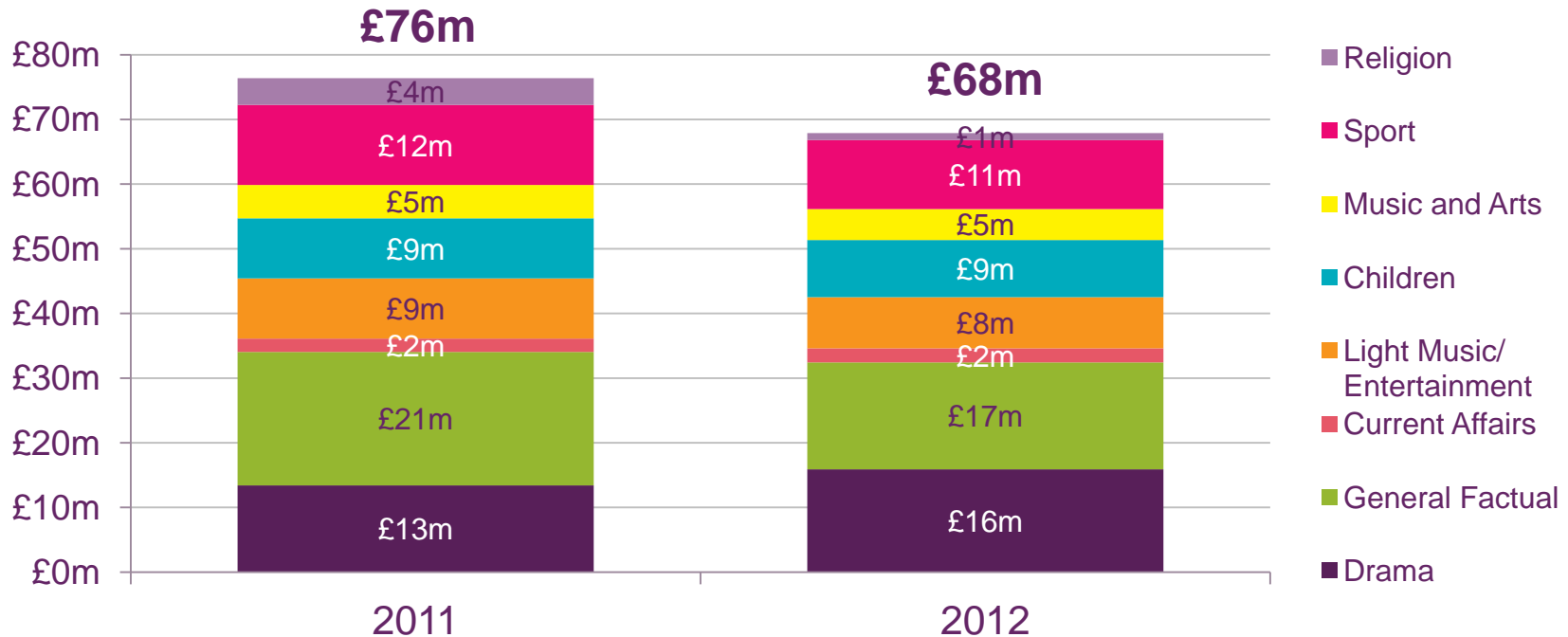


Source: Ofcom/broadcasters

Note: A new category 'Multi Nation/Region production' has been created for Regional Productions from London Producers which do not meet both 70% of spend and 50% of talent in any one particular Macro Region' See http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on Ofcom website for further details.

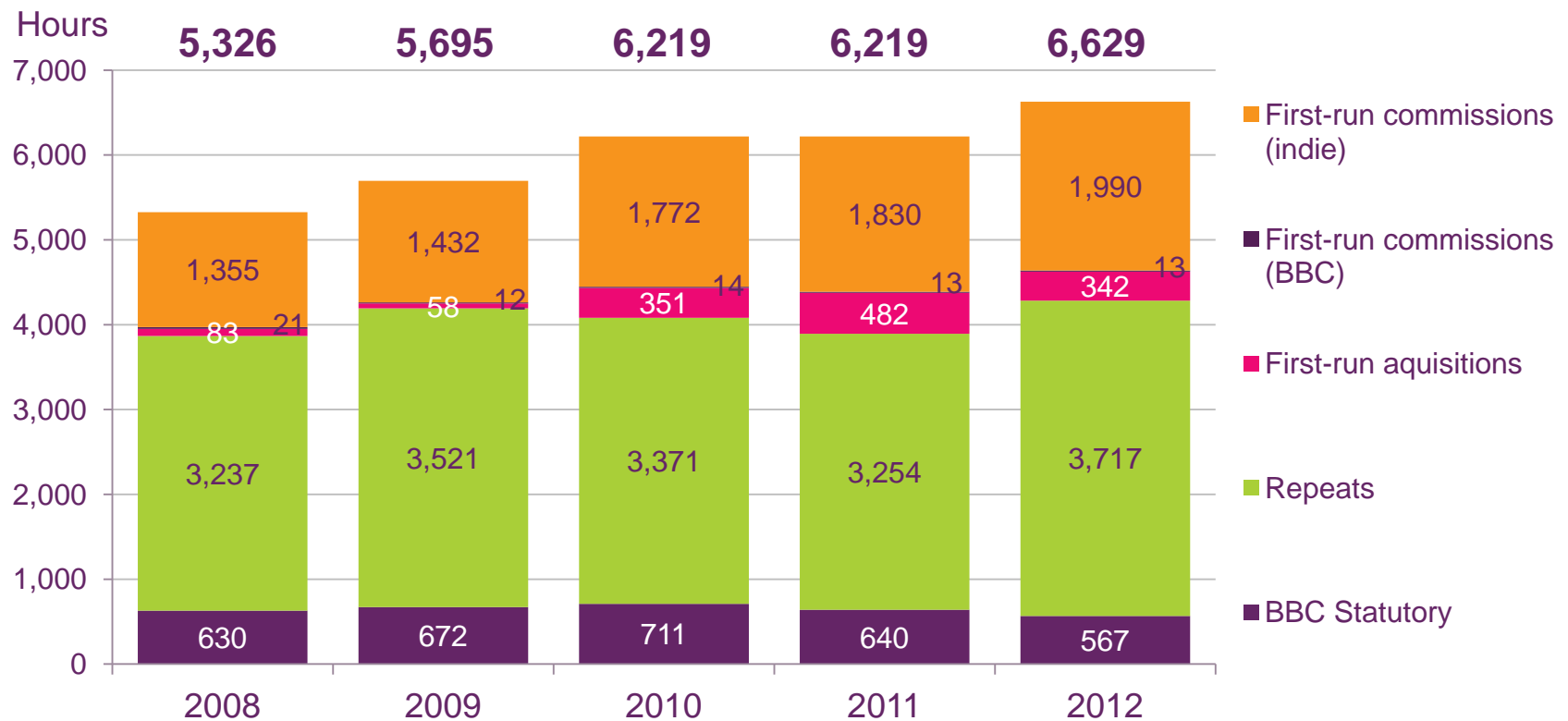
Figure 2.18 Spend by S4C on first-run Welsh-language programming

Spend on Welsh language programming



Source: S4C. All figures expressed in 2012 prices. Note: BBC statutory hours for S4C are per calendar year. BBC's financial contribution for S4C statutory hours are reported by financial year in BBC accounts but are reported by calendar year in the S4C Annual Report.

Figure 2.19 Type of Welsh-language output on S4C, by hours



Source: S4C.