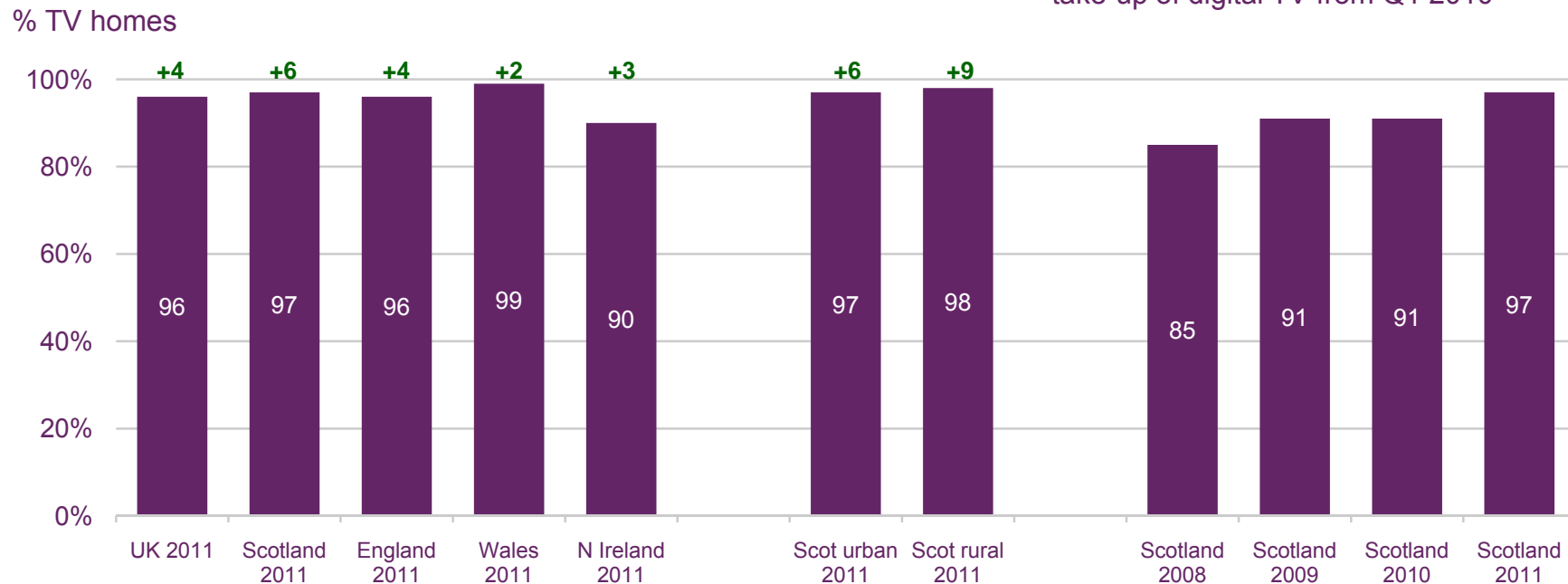


# Tv and audio-visual

# Take-up digital TV

Figure above bar shows % point change in take-up of digital TV from Q1 2010

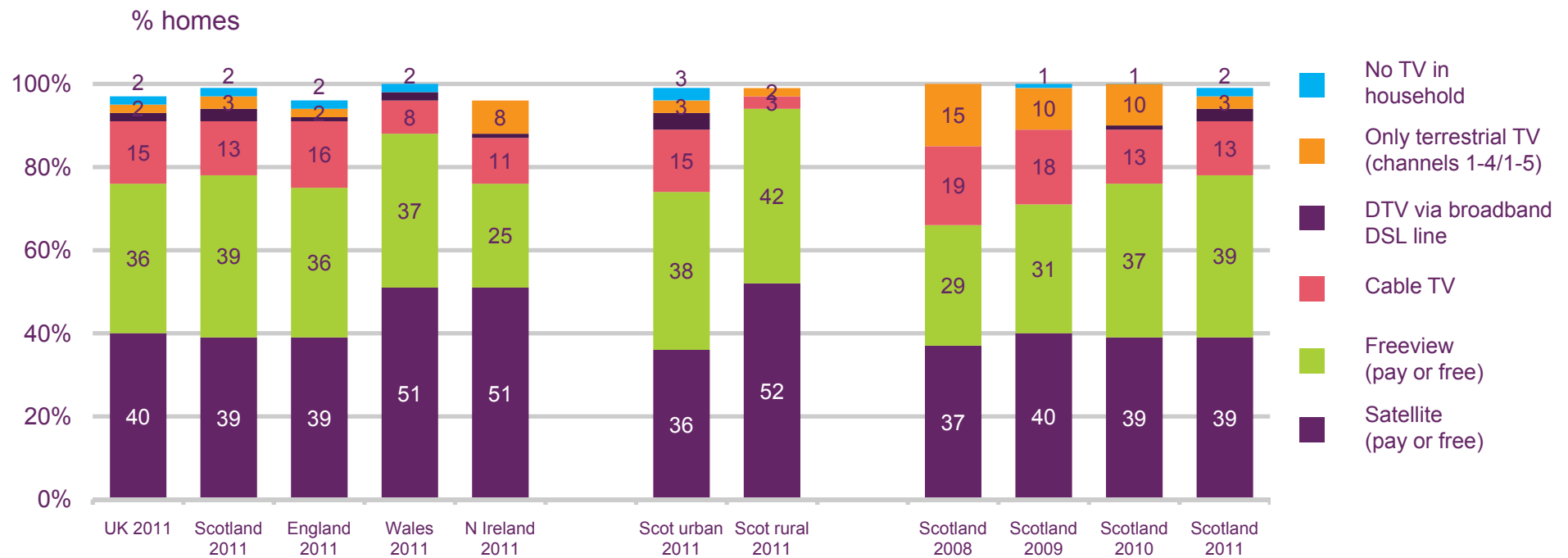


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ with a TV in household (n = 3412 UK, 479 Scotland, 1941 England, 483 Wales, 509 Northern Ireland, 232 Scotland urban, 247 Scotland rural, 916 Scotland 2008, 1002 Scotland 2009, 1452 Scotland 2010, 479 Scotland 2011)

# Main TV set share by platform



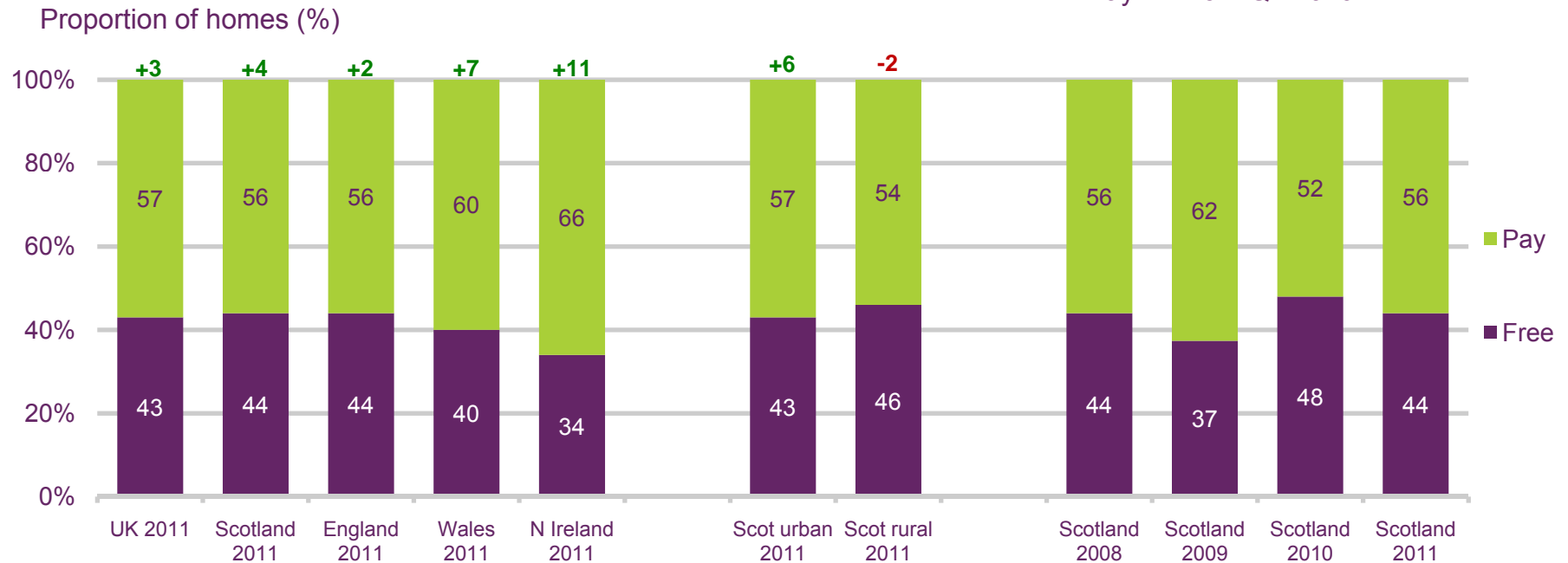
QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

# Proportion of homes with free and pay television

Figure above bar shows % point change in Pay TV from Q1 2010

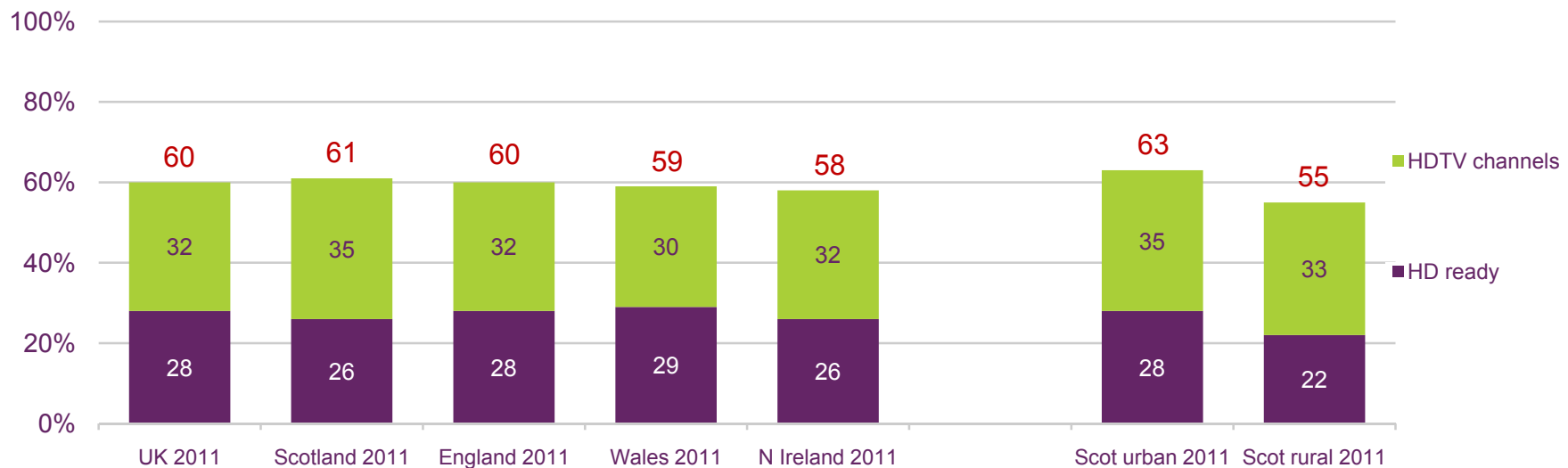


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ with a TV in household (n = 3412 UK, 479 Scotland, 1941 England, 483 Wales, 509 Northern Ireland, 232 Scotland urban, 247 Scotland rural, 855 Scotland 2008, 1002 Scotland 2009, 1452 Scotland 2010, 479 Scotland 2011)

## Proportion of homes with HD television

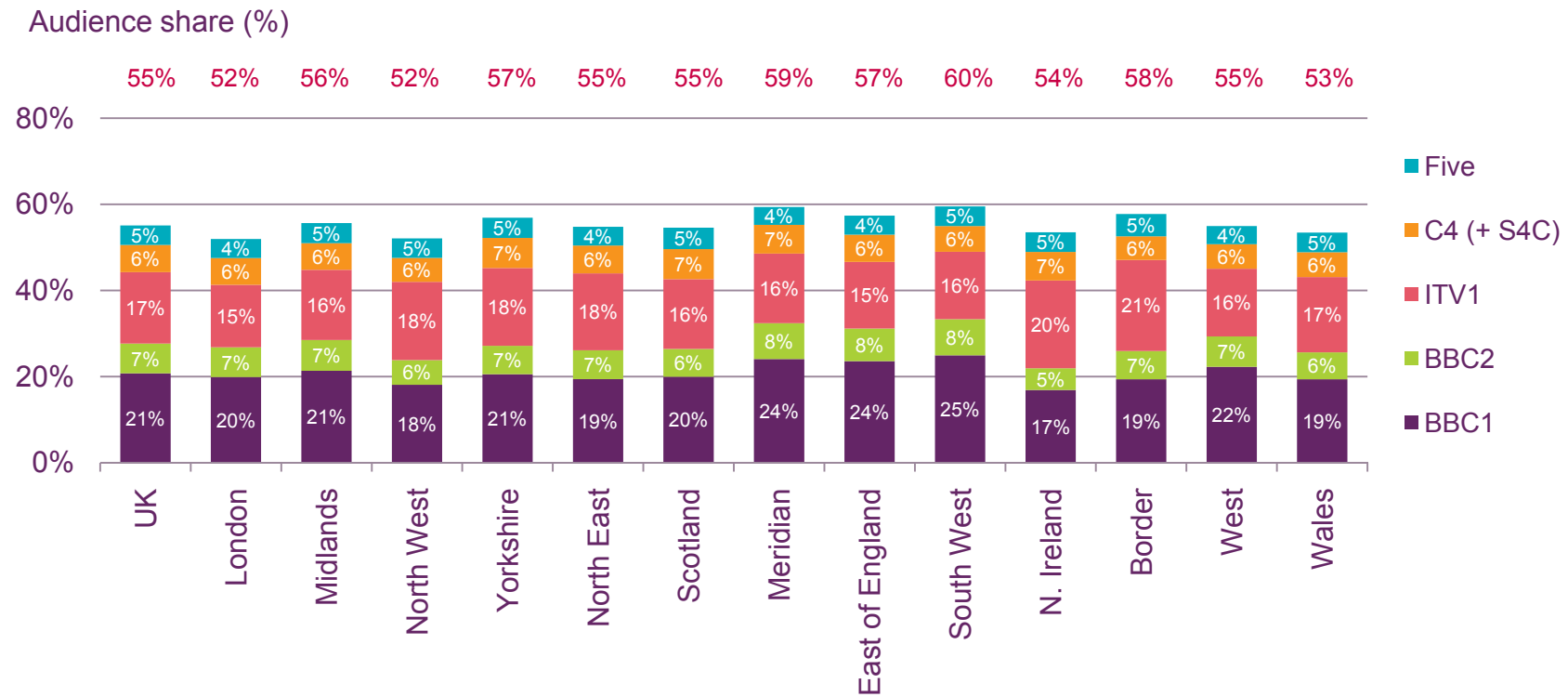


QH53. Is the main TV in your household an HDTV set or HD ready?/ QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

Source: Ofcom research, Quarter 1 2011

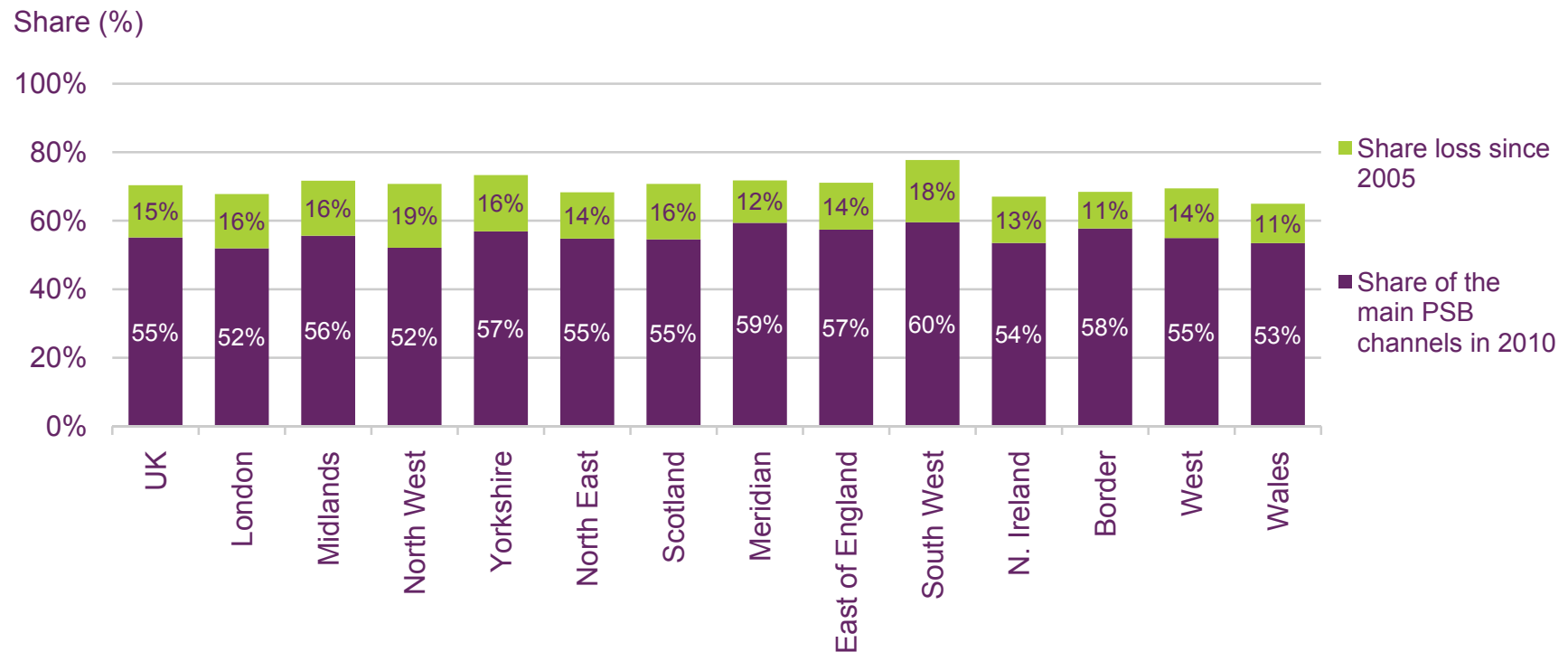
Base: All adults aged 16+ (3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural)

# Share of the five terrestrial networks in all homes, 2010



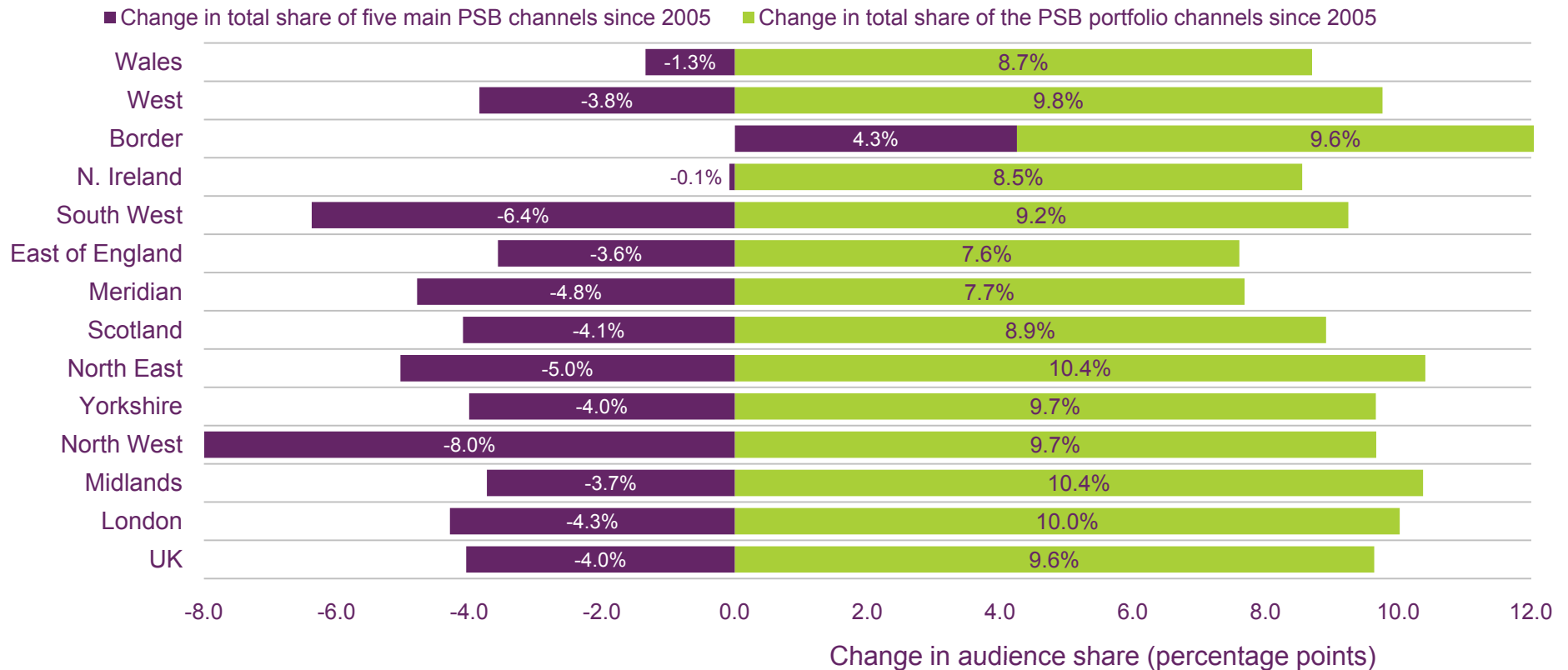
Source: BARB

## Reduction in combined share of the five PSB channels, all homes, 2005 & 2010



Source: BARB.

# Net change in the audience share of the five main networks and the PSB portfolio channels across multichannel viewers, 2005 - 2010

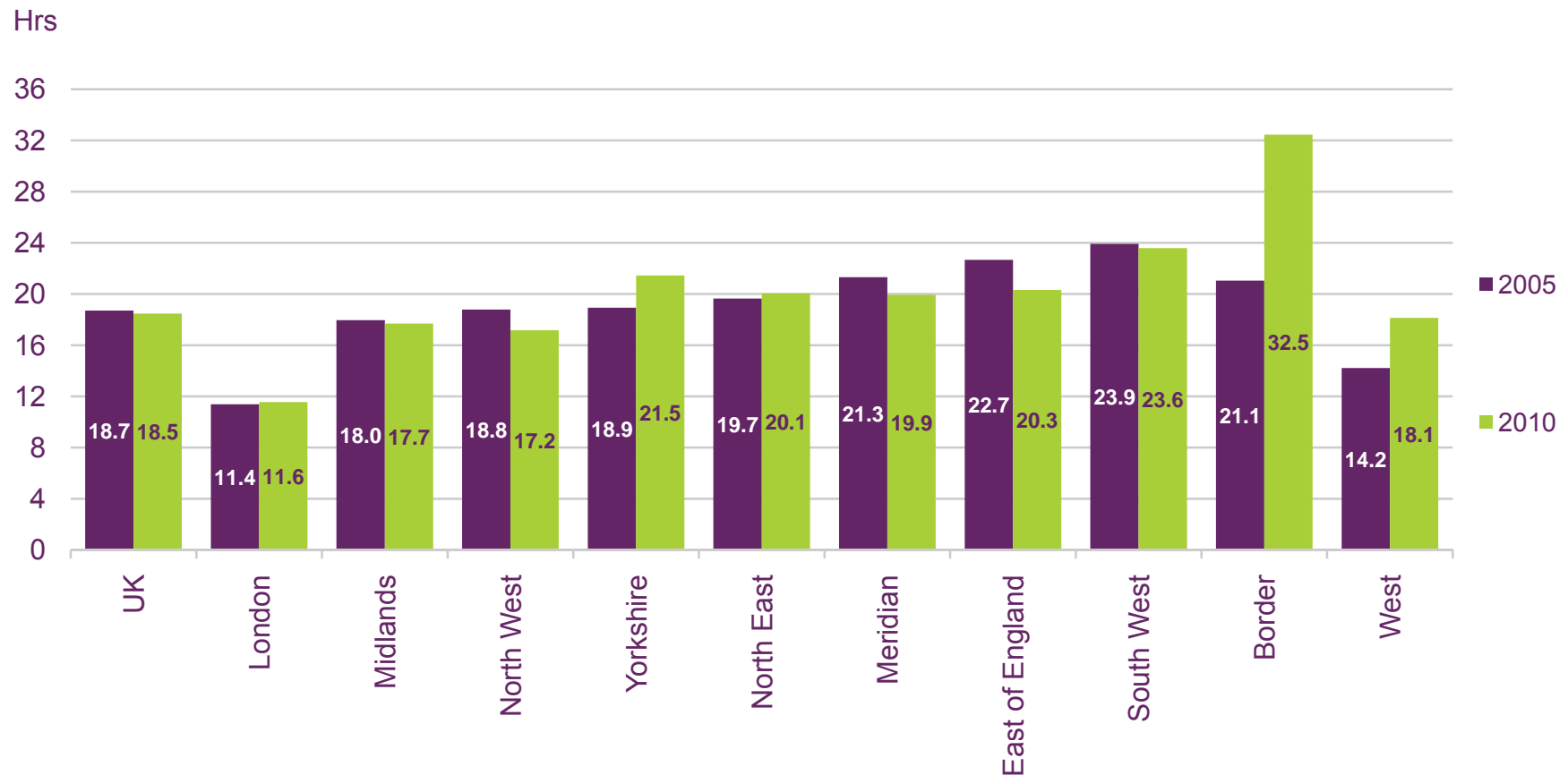


Source: BARB. All individuals (4+) in multichannel homes.

Note: 'PSB portfolio channels' includes all the main PSB's multichannel channels (except for the five terrestrial channels)



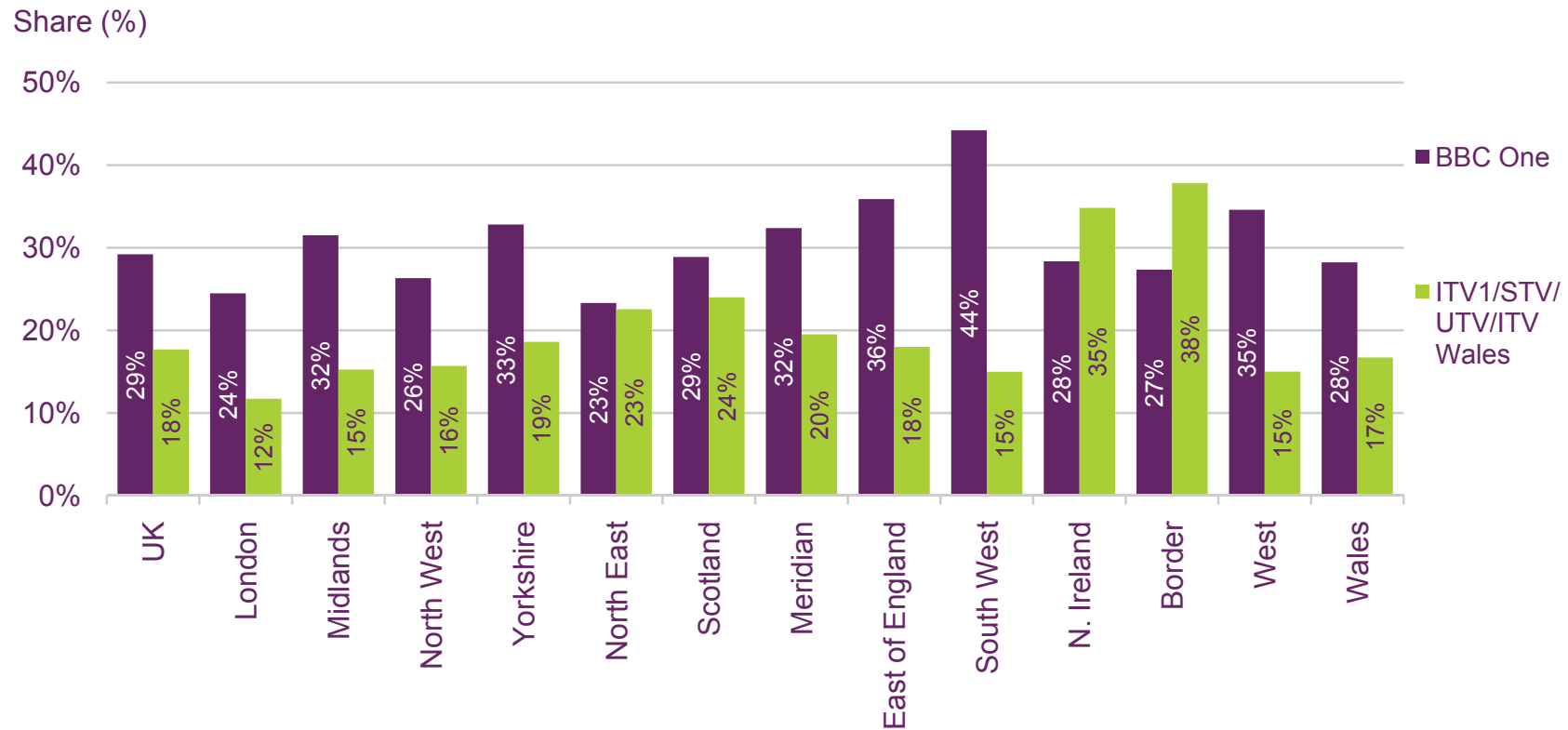
# Combined total hours of viewing of early evening regional news bulletins, all homes in 2005-2010, by English region



Source: BARB

Note: Based on total minutes of viewing to Regional News prog, start time 17:55-18:35, 10mins+ duration, BBC1 & ITV1, weekdays

## BBC One and ITV1/STV/UTV/ITV Wales early evening news bulletin shares, all homes, 2010

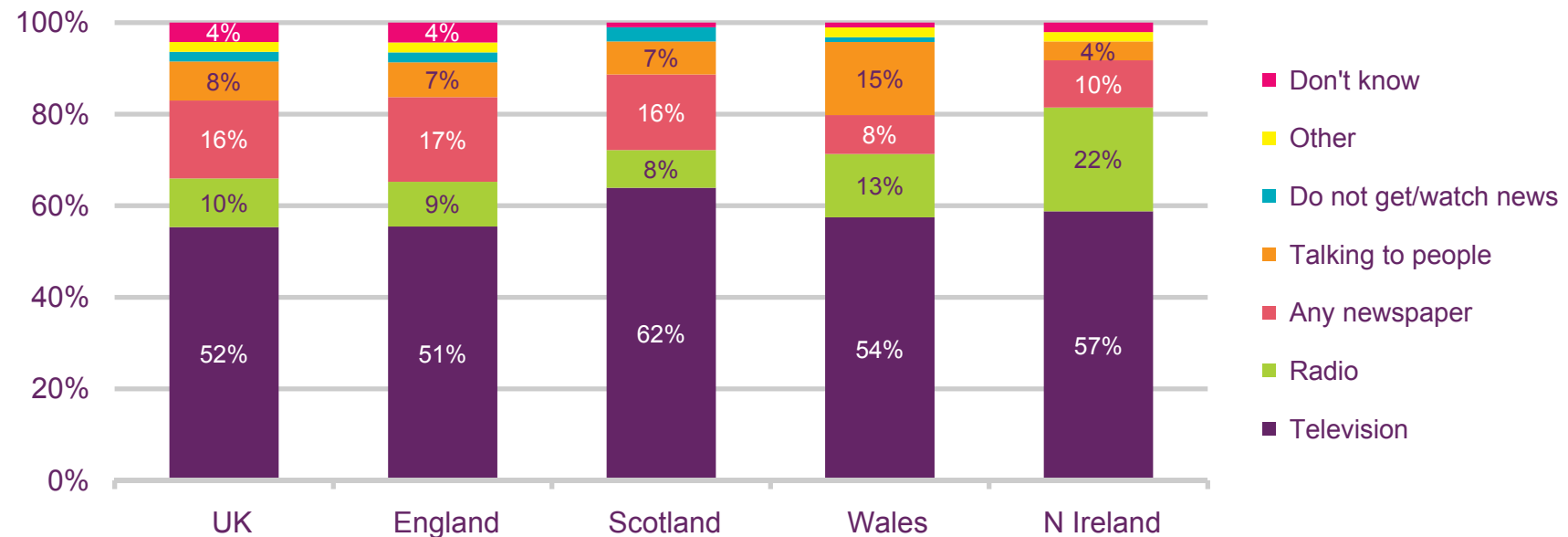


Source: BARB

Note: Based on Regional News prog, start time 17:55-18:35, 10mins+ duration, BBC1 & ITV1, weekdays

## 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 Survey 2010

Base: All adults 15+. n = 2,141 (UK), 1,726 (Eng) 194 (Sc), 113 (Wa), 108 (NI)

Only responses ≥ 4% labelled

# Online TV/ video viewing

Online TV/ video viewing on PC or mobile

Green figure above bar shows % point change in viewing from Q1 2010  
 Proportion of individuals with broadband at home



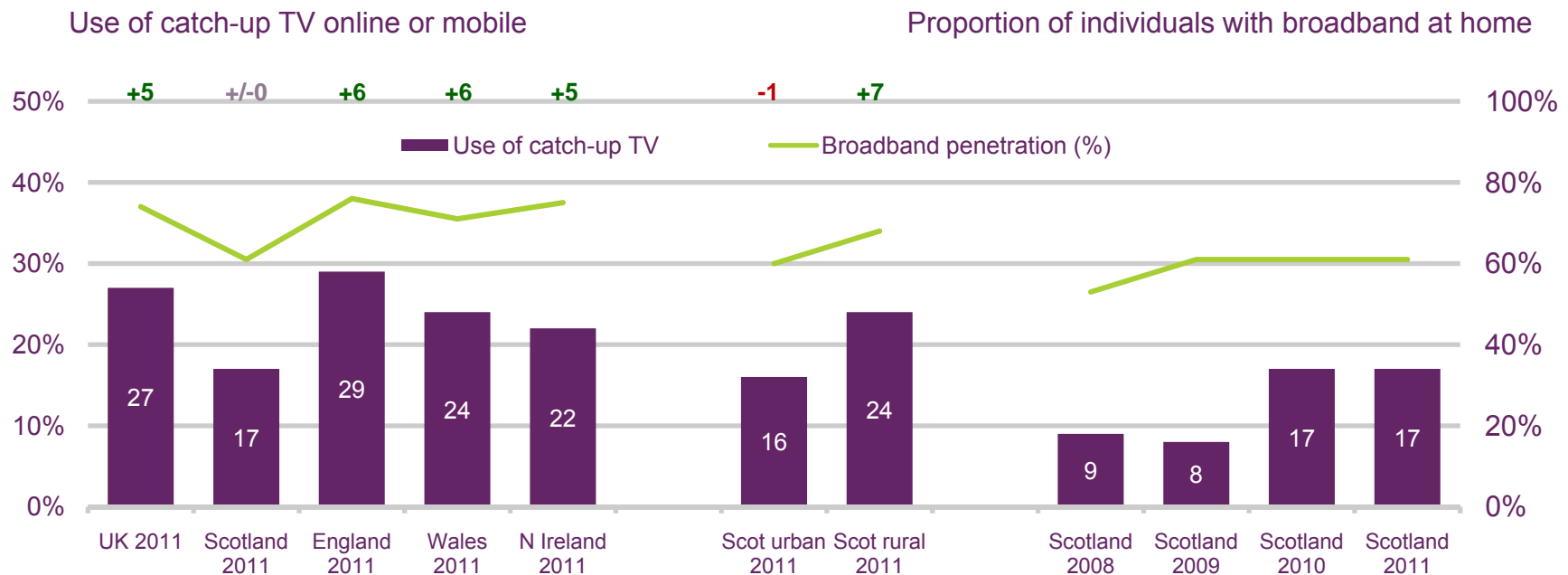
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week? / QD28A-B. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? And which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever making this use)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

# Use of catch-up TV

Figure above bar shows % point change in use of catch-up TV from Q1 2010

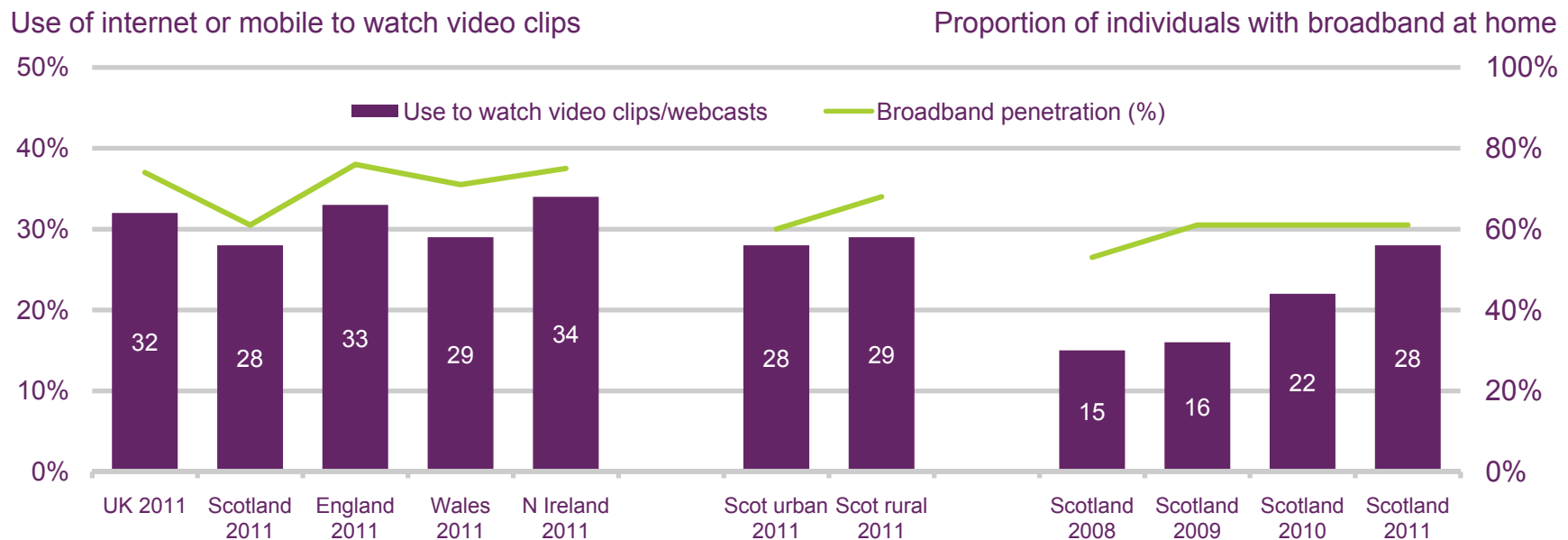


QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

# Use of internet for watching video clips/webcasts (e.g. YouTube & Big Brother)

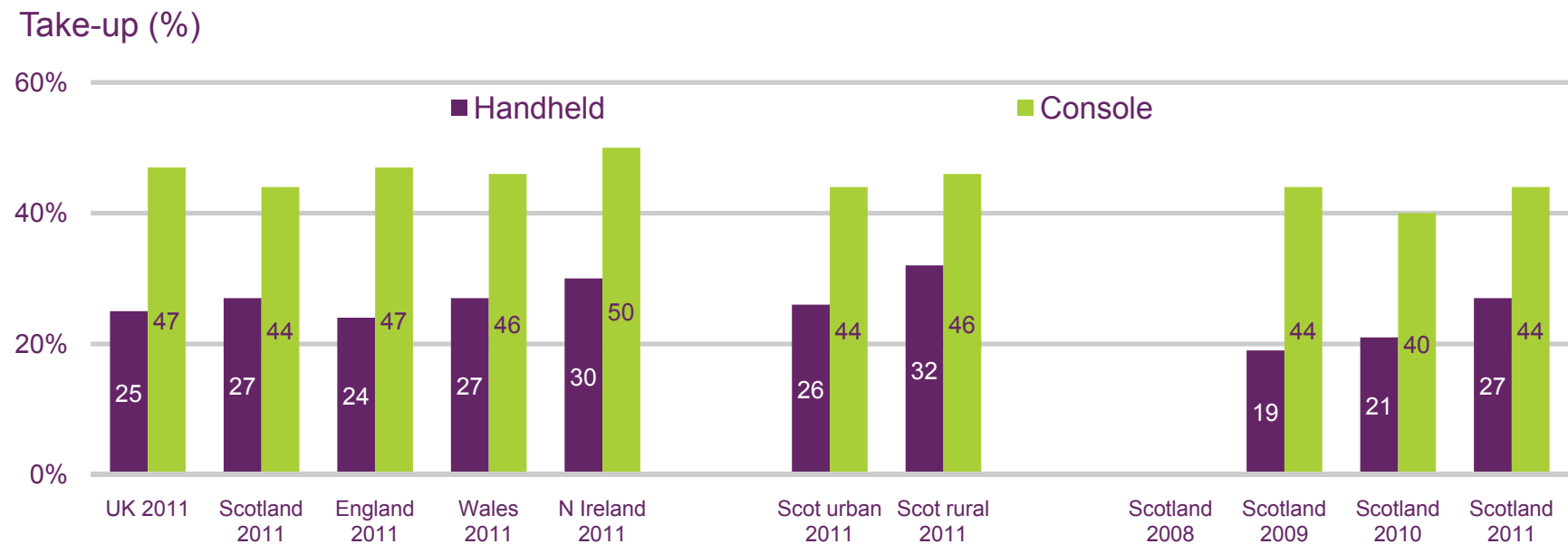


QE10A. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

## Take up of leading games consoles in Scotland



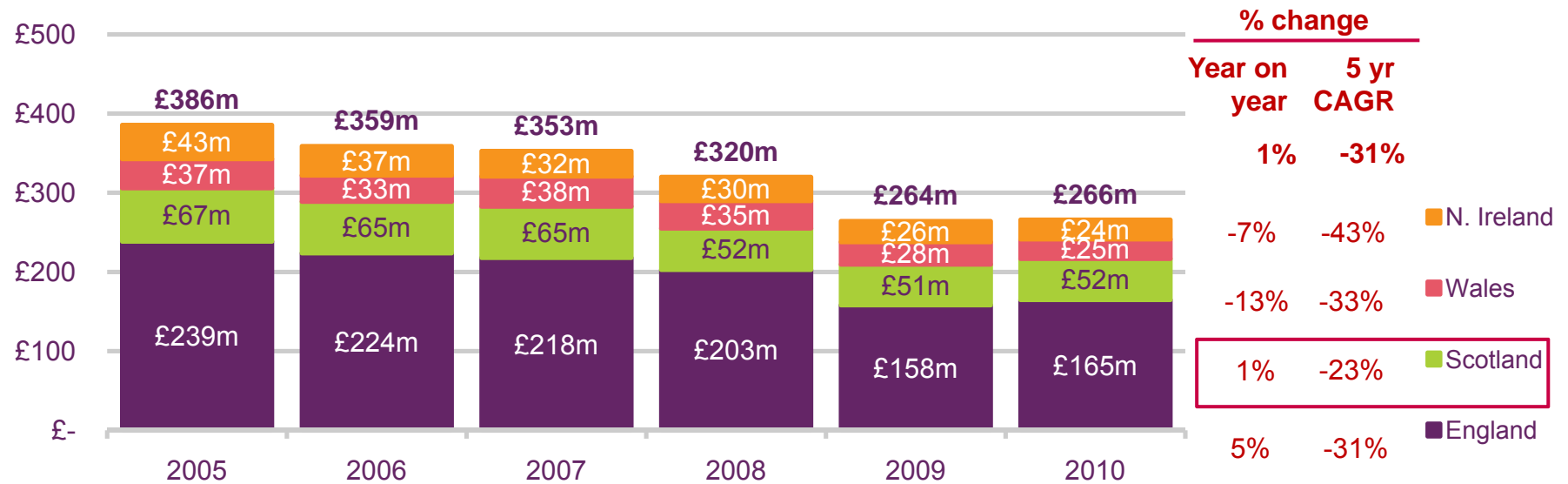
QB4. Which games console/s do you or does anyone in your household have at the moment? (NB Not asked in 2008)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

# Spend on originated nations and regions output by the BBC, ITV1/STV/UTV

Spend (£m, 2010 prices)



Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.



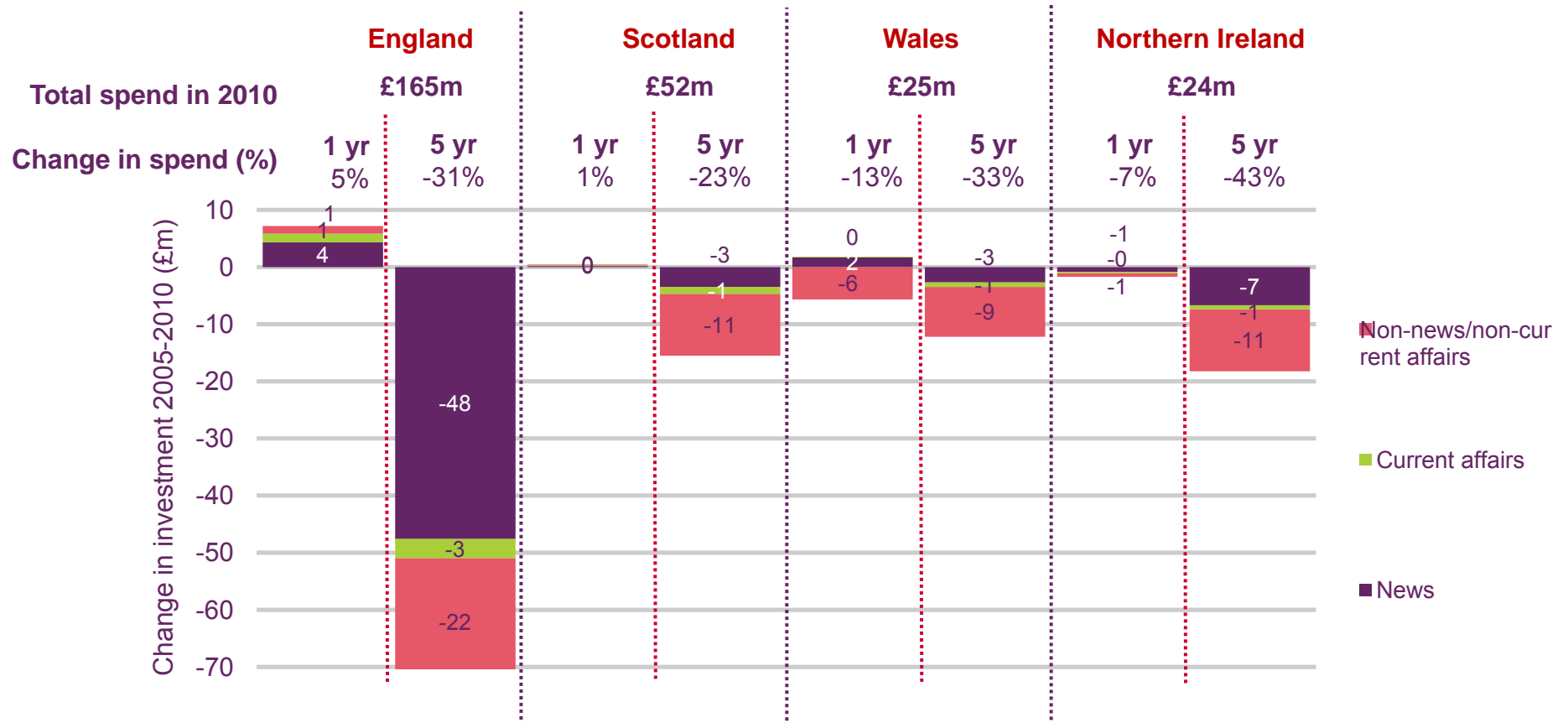
# Spend on originated nations and regions output by nation, 2005 and 2010



Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

# Change in investment by genre and nation, 2005 - 2010



Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

## Change in investment by genre and nation, 2005 - 2010

	England		Scotland		Wales		N. Ireland	
	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)
News	4	-48	0	-3	2	-3	-1	-7
Current affairs	1	-3	0	-1	0	-1	-0	-1
Non-news/non-current affairs	1	-22	0	-11	-6	-9	-1	-11
<b>Total Spend in 2010</b>	<b>£165m</b>		<b>£52m</b>		<b>£25m</b>		<b>£24m</b>	

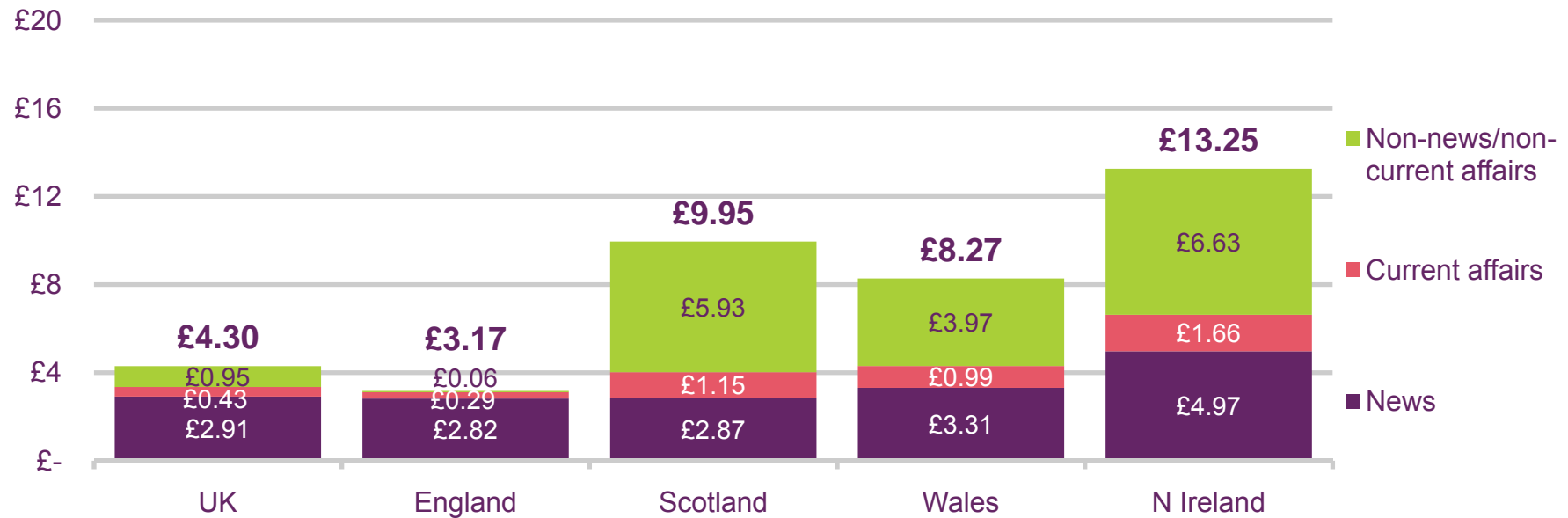
	England		Scotland		Wales		N. Ireland	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
<b>Change in Spend</b>	5%	-31%	1%	-23%	-13%	-33%	-7%	-43%

Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

# Spend per head made by the BBC and ITV1 in national and regional output

Spend per head (£m, 2010 prices)



Source: PSB returns. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. All figures expressed in 2010 prices.

# Hours of regionalised output by genre and broadcaster, 2010

	UK	England	Scotland	Wales	N. Ireland
2010 total hours	<b>11,046 hrs</b>	7,156 hrs	1,881 hrs	1,002 hrs	1,007 hrs
Change since 2009	<b>6%</b>	5%	14%	-3%	4%
Change since 2005	<b>-9%</b>	-10%	13%	-24%	-13%



Source: PSB returns

Note: Hours data for first-run originations only. Hours excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

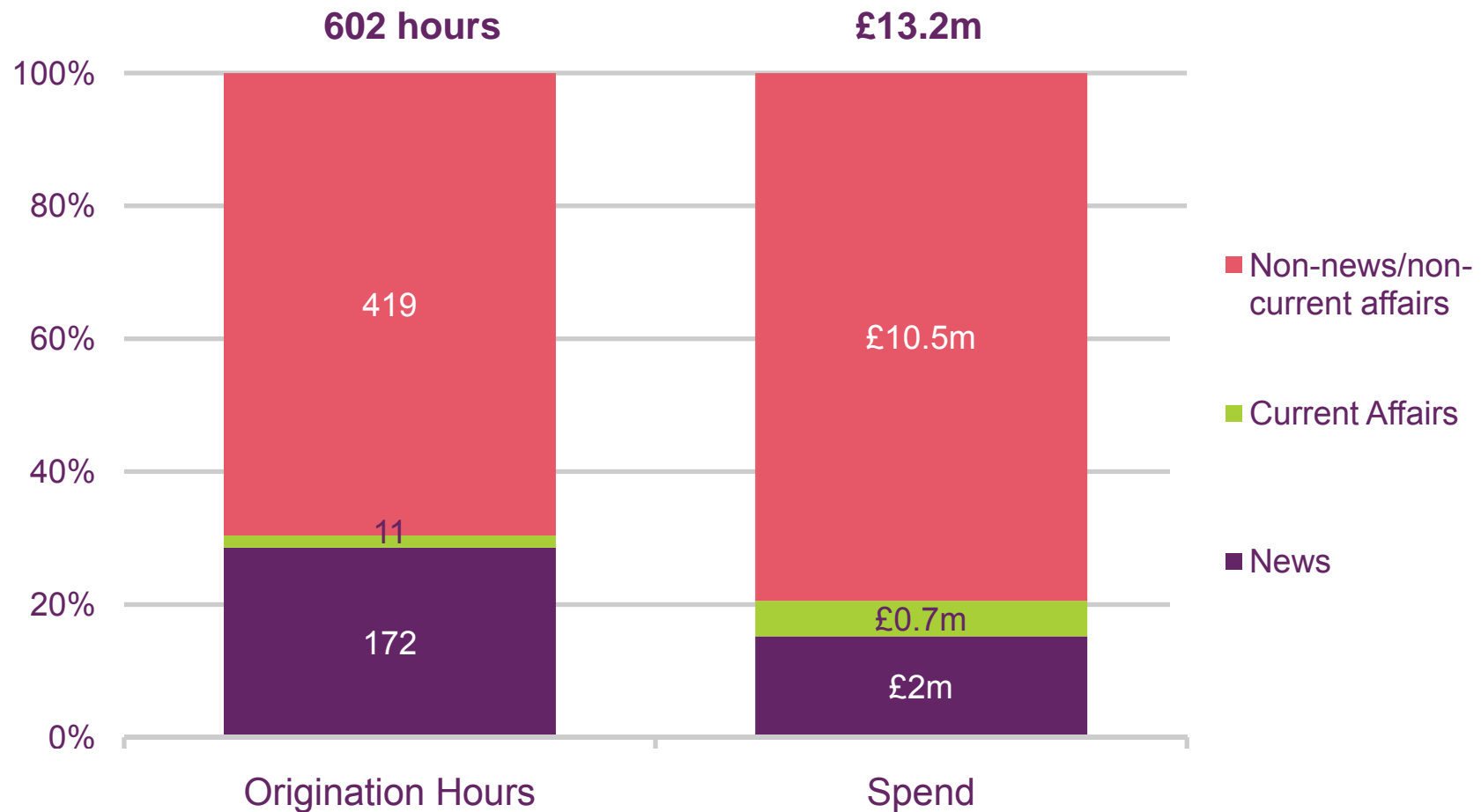
## Regionalised output cost per hour by nation 2005 - 2010



Source: Broadcasters. All figures expressed in 2010 prices.

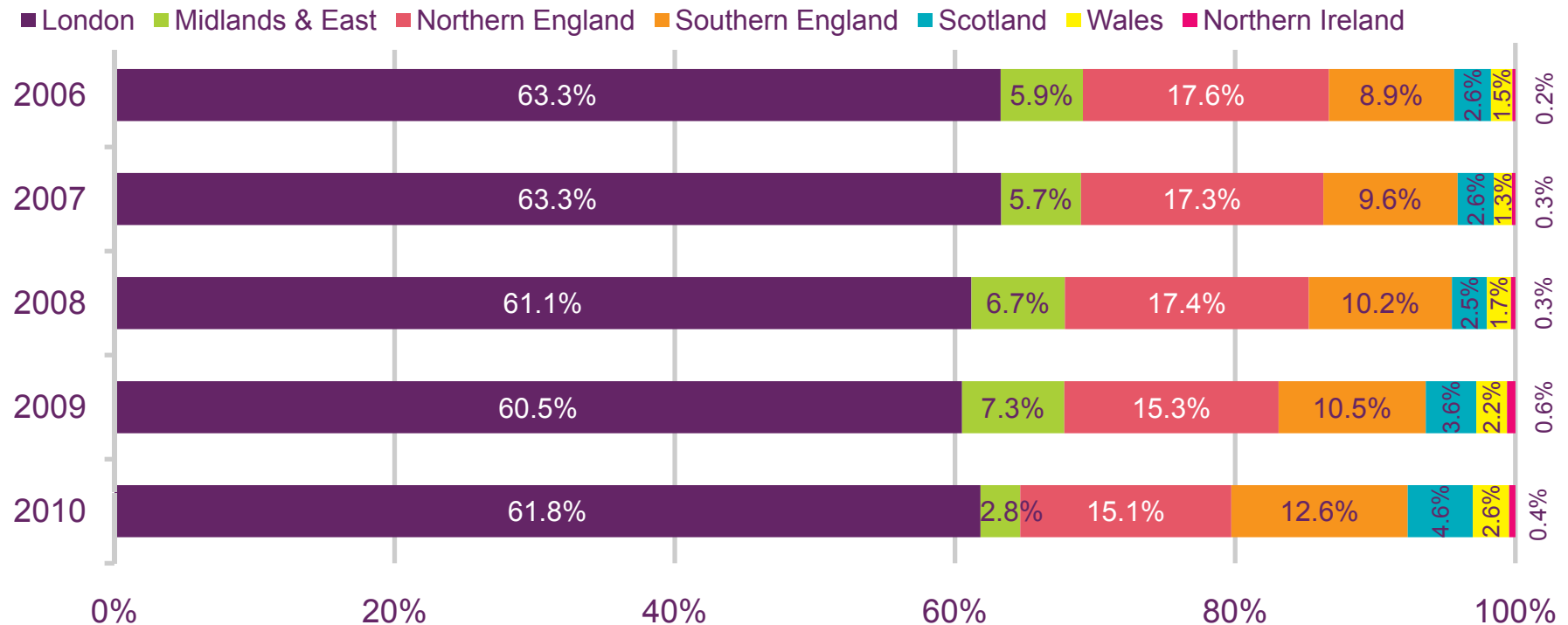
Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

## BBC Alba originations, by hours and spend, 2010



# Expenditure on out-of-London productions

Percentage of production by value



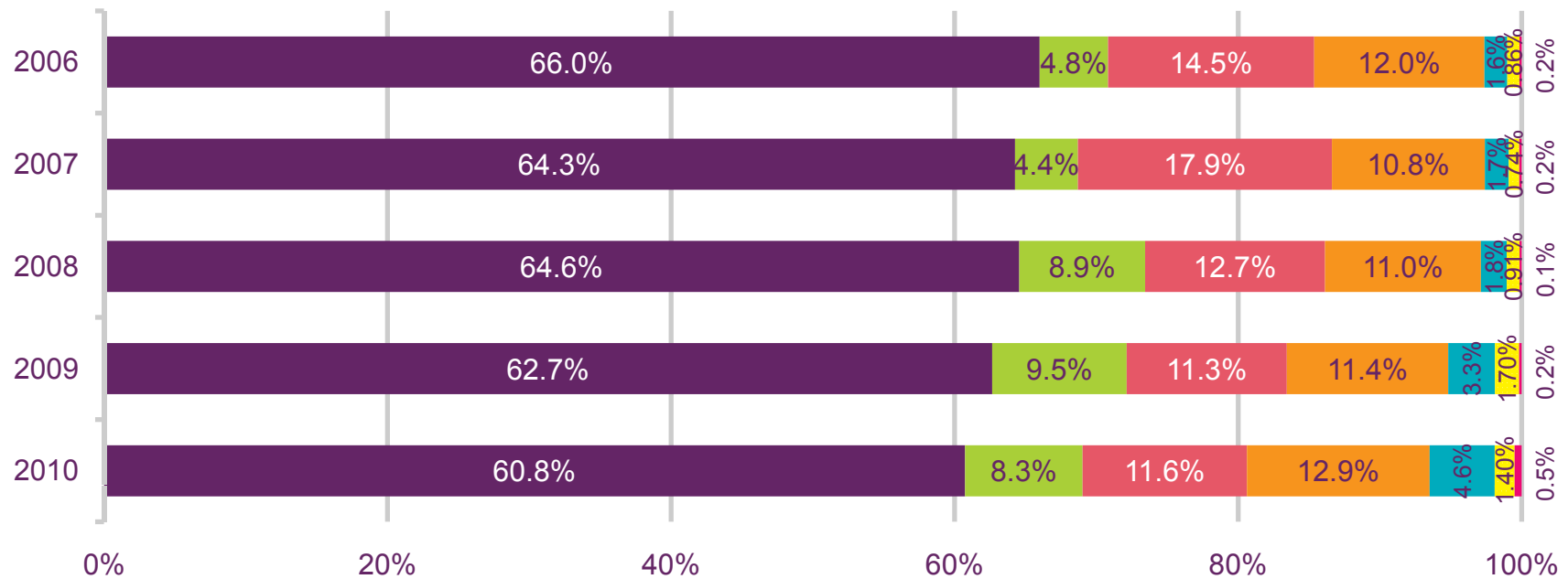
Source: Broadcaster returns



# Volume of out-of-London production

## Percentage of production by volume

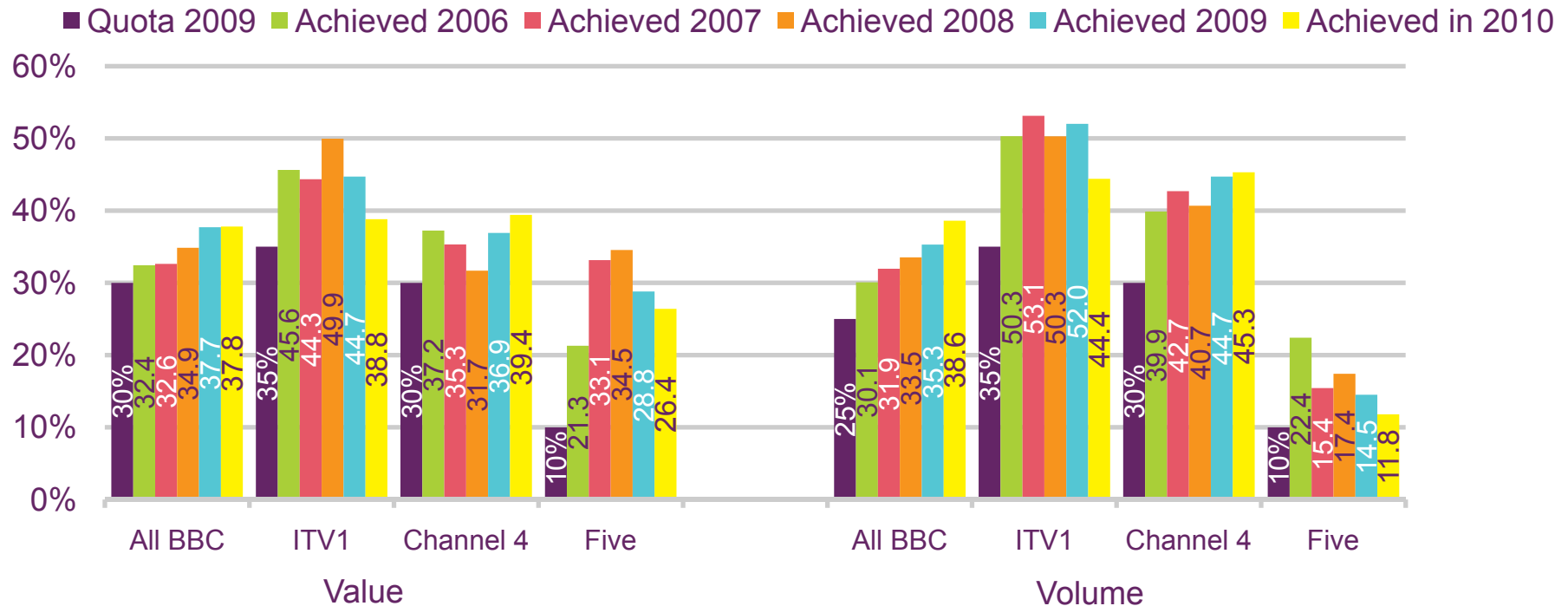
■ London 
 ■ Midlands & East 
 ■ Northern England 
 ■ Southern England 
 ■ Scotland 
 ■ Wales 
 ■ Northern Ireland



Source: Broadcaster returns

# Performance against the Out-of-London production quotas

Percentage of network production produced outside London, by value and by volume



Source: Broadcaster returns

## Out-of-London productions by channel/macro-region: value

Distribution of spend on qualifying productions by macro region and channel (%)

	BBC				ITV1				Channel 4				Channel 5			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
London	67.4%	65.1%	62.3%	62.2%	55.7%	50.1%	55.3%	61.2%	64.7%	68.3%	63.1%	60.6%	66.9%	65.5%	71.2%	73.6%
Midlands & East	4.1%	3.8%	3.8%	3.9%	9.2%	13.4%	14.4%	1.4%	2.1%	1.0%	2.3%	1.7%	15.4%	17.4%	16.0%	7.2%
Northern England	10.2%	8.9%	8.2%	7.7%	29.4%	31.0%	25.5%	25.4%	18.5%	18.4%	19.4%	19.7%	3.0%	5.1%	1.8%	0.1%
Southern England	12.0%	14.2%	14.0%	13.0%	3.7%	4.0%	4.1%	11.4%	12.8%	10.8%	12.4%	13.5%	12.1%	8.7%	9.0%	12.1%
Scotland	3.3%	3.7%	6.1%	7.4%	1.9%	1.4%	0.6%	0.4%	1.7%	1.4%	2.5%	4.1%	2.3%	2.9%	1.9%	6.2%
Wales	2.6%	3.5%	4.4%	5.0%	0.0%	0.1%	0.1%	0.1%	0.2%	0.0%	0.2%	0.2%	0.5%	0.5%	0.1%	0.8%
Northern Ireland	0.4%	0.6%	1.2%	0.8%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%
<b>Total Regional</b>	<b>32.6%</b>	<b>34.9%</b>	<b>37.7%</b>	<b>37.8%</b>	<b>44.3%</b>	<b>49.9%</b>	<b>44.7%</b>	<b>38.8%</b>	<b>35.3%</b>	<b>31.7%</b>	<b>36.9%</b>	<b>39.4%</b>	<b>33.1%</b>	<b>34.5%</b>	<b>28.8%</b>	<b>26.4%</b>

Source: Broadcaster returns

## Out-of-London productions by channel/macro-region: volume

Distribution of hours of qualifying productions by macro region and channel (%)

	BBC				ITV				Channel 4				Channel 5			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
London	68.1%	66.5%	64.7%	61.4%	46.9%	49.7%	48.0%	55.6%	57.3%	59.3%	55.3%	54.7%	84.6%	82.6%	85.5%	88.2%
Midlands & East	5.8%	5.6%	5.5%	5.7%	2.9%	21.0%	25.5%	19.8%	0.5%	1.2%	1.9%	2.3%	7.1%	8.7%	6.5%	5.1%
Northern England	6.6%	5.7%	5.1%	5.0%	43.7%	24.3%	20.5%	19.3%	23.5%	22.2%	23.7%	23.3%	3.3%	4.9%	1.5%	0.1%
Southern England	14.6%	17.0%	15.7%	17.6%	6.0%	4.3%	5.7%	5.0%	16.3%	14.6%	15.3%	14.0%	4.6%	3.1%	3.3%	4.4%
Scotland	3.2%	3.4%	6.5%	7.5%	0.4%	0.3%	0.2%	0.2%	1.5%	1.4%	2.0%	3.7%	0.2%	0.6%	0.4%	1.8%
Wales	1.5%	1.5%	2.2%	2.0%	0.0%	0.2%	0.2%	0.1%	0.8%	1.3%	1.6%	1.6%	0.2%	0.2%	2.8%	0.5%
Northern Ireland	0.3%	0.3%	0.4%	0.8%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
<b>Total Regional</b>	<b>31.9%</b>	<b>33.5%</b>	<b>35.3%</b>	<b>38.6%</b>	<b>53.1%</b>	<b>50.3%</b>	<b>52.0%</b>	<b>44.4%</b>	<b>42.7%</b>	<b>40.7%</b>	<b>44.7%</b>	<b>45.3%</b>	<b>15.4%</b>	<b>17.4%</b>	<b>14.5%</b>	<b>11.8%</b>

Source: Broadcaster returns