The Communications Market 2010

Data release

TV and audio-visual: data release

August 2010

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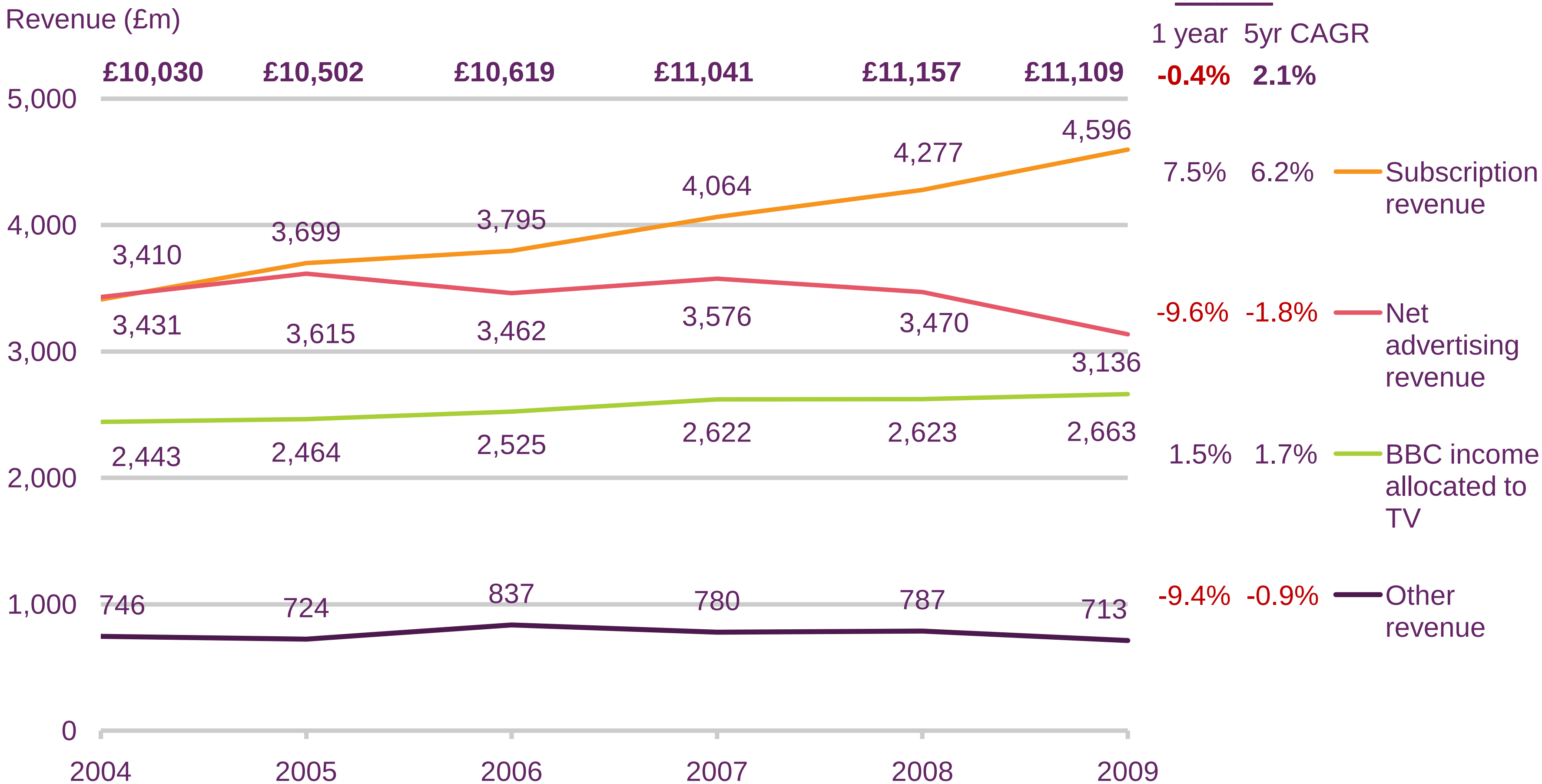
Total TV industry revenue, by source

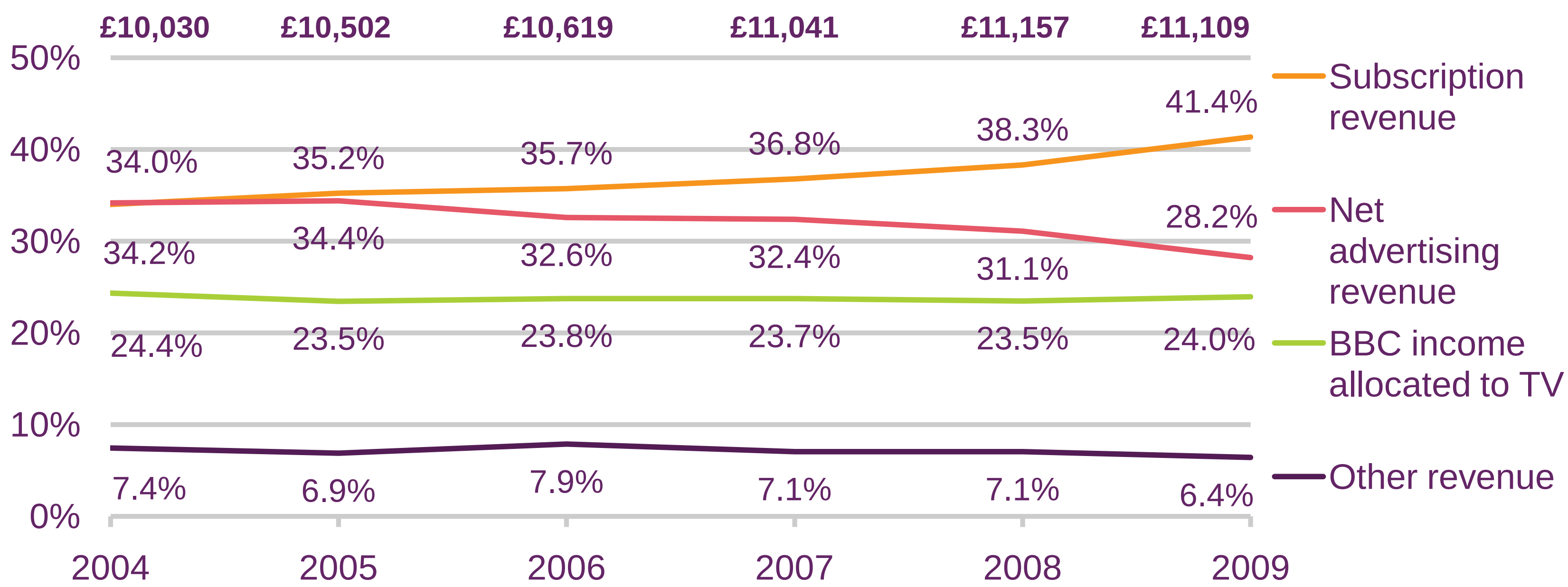


Source: Ofcom/broadcasters

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,

TV industry revenues, by share

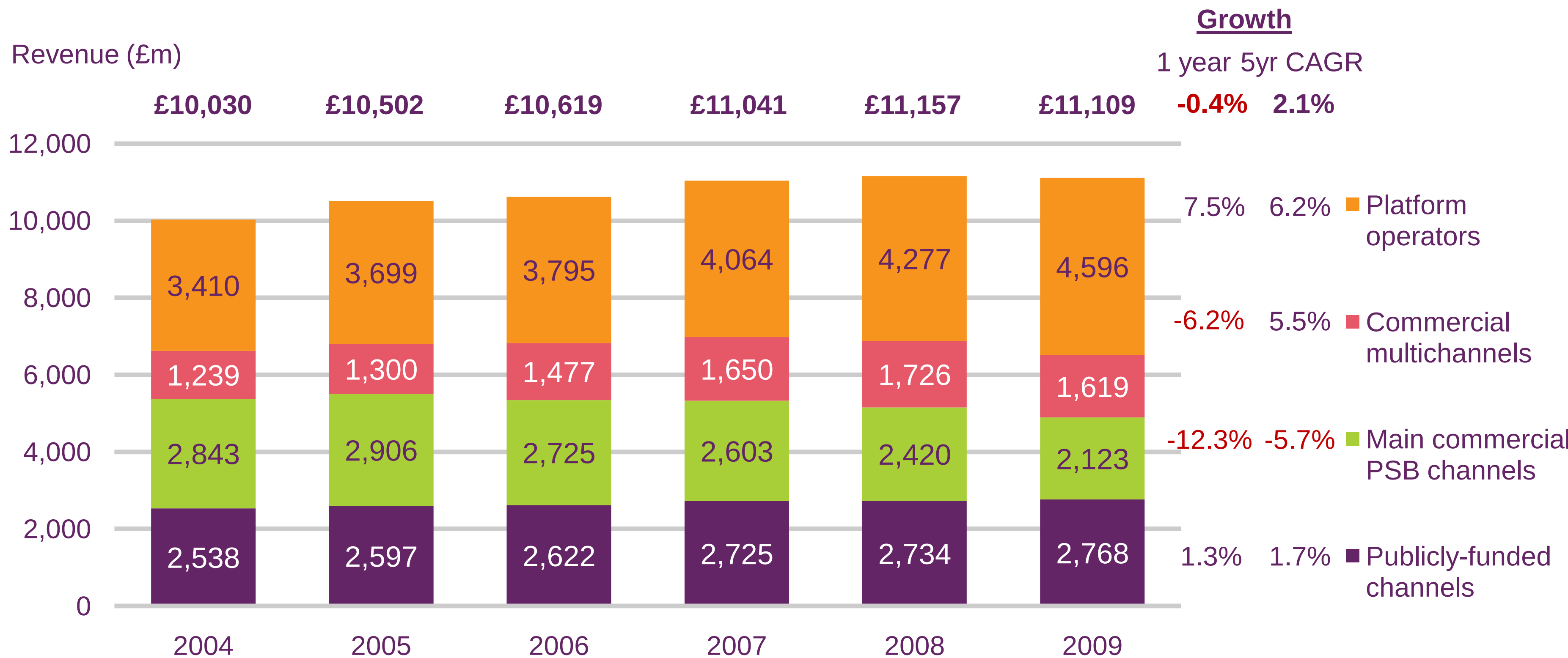
TV industry revenue shares (%)



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.

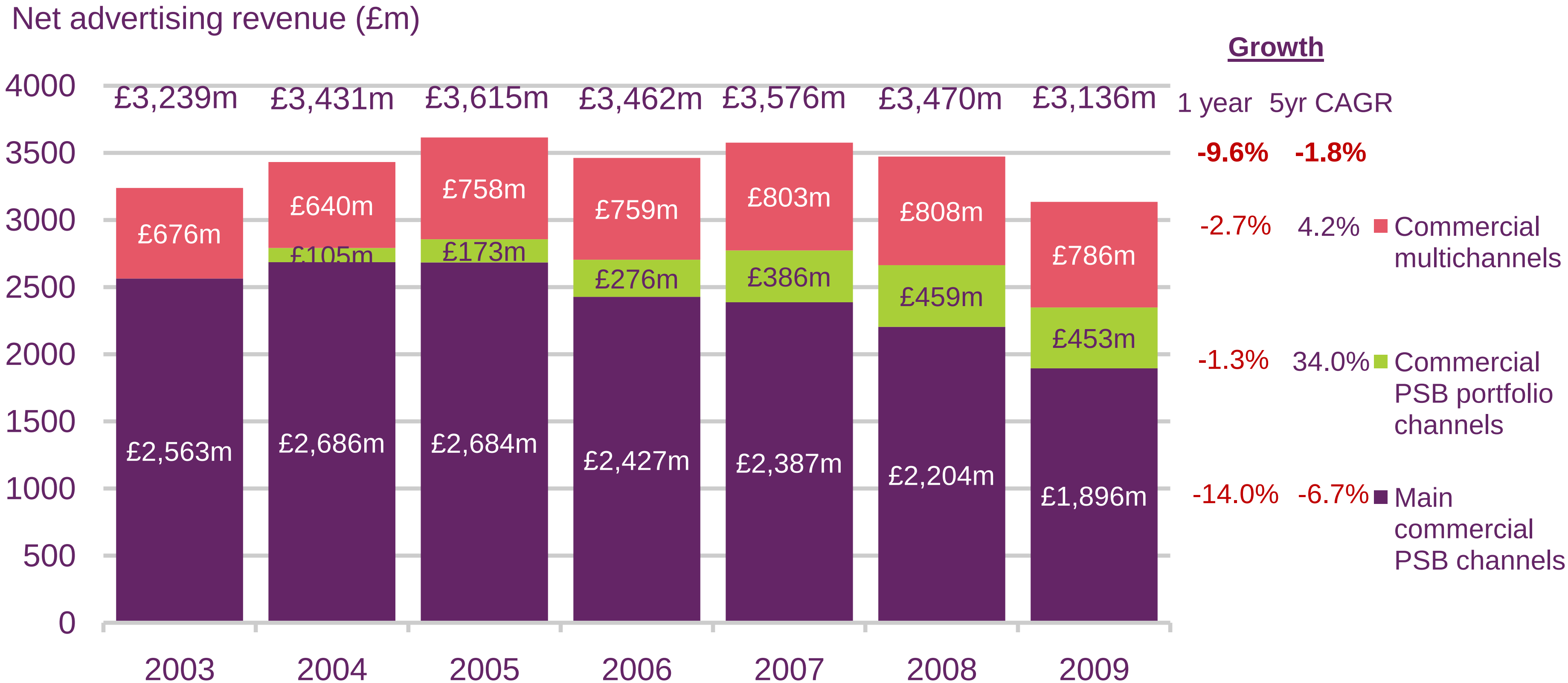
Total TV industry revenue by sector



Source: Ofcom/broadcasters

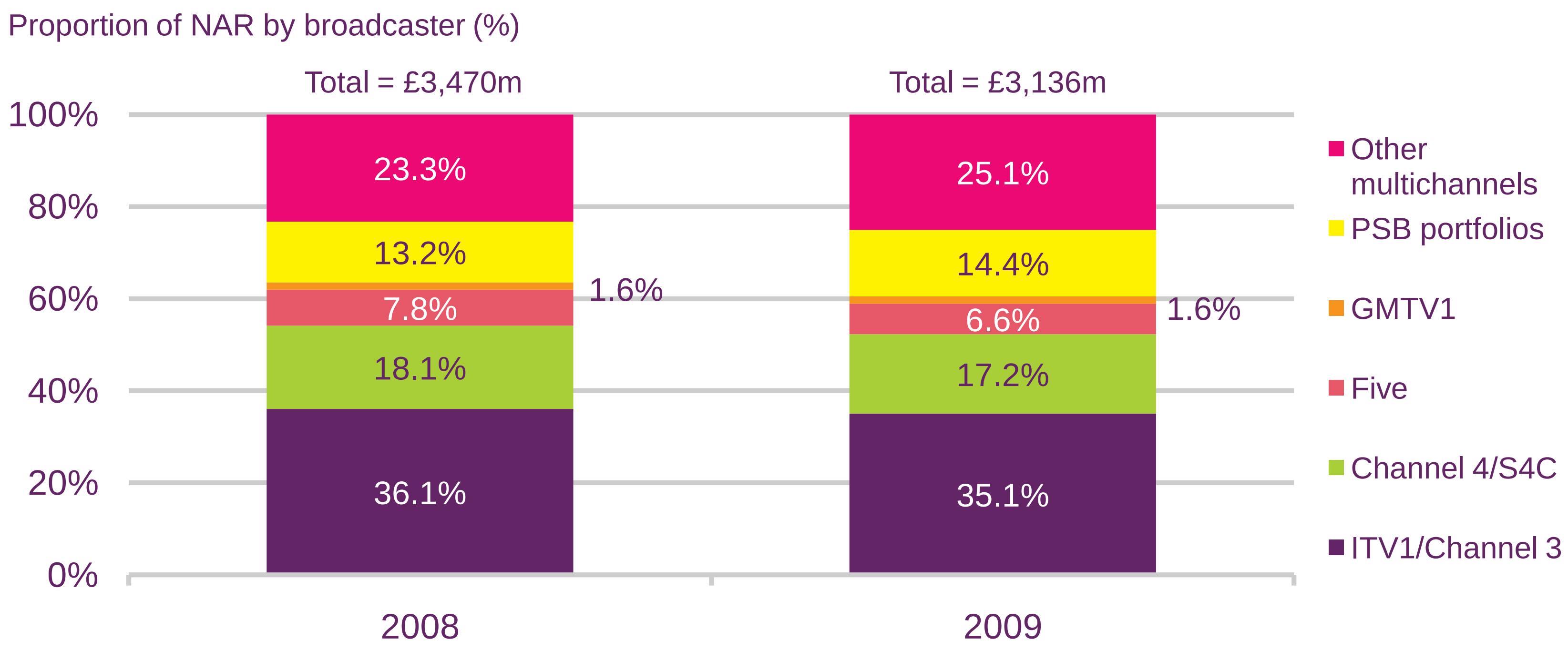
Note: Figures expressed in nominal terms. Main commercial PSB channels comprise ITV1, STV, UTV, Channel Television, GMTV1, Channel 4, Five and S4C. Commercial multichannels comprise all multichannels other than those owned by ITV1, Channel 4 and Five. Publicly-funded channels comprise BBC One, BBC Two, 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.

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.

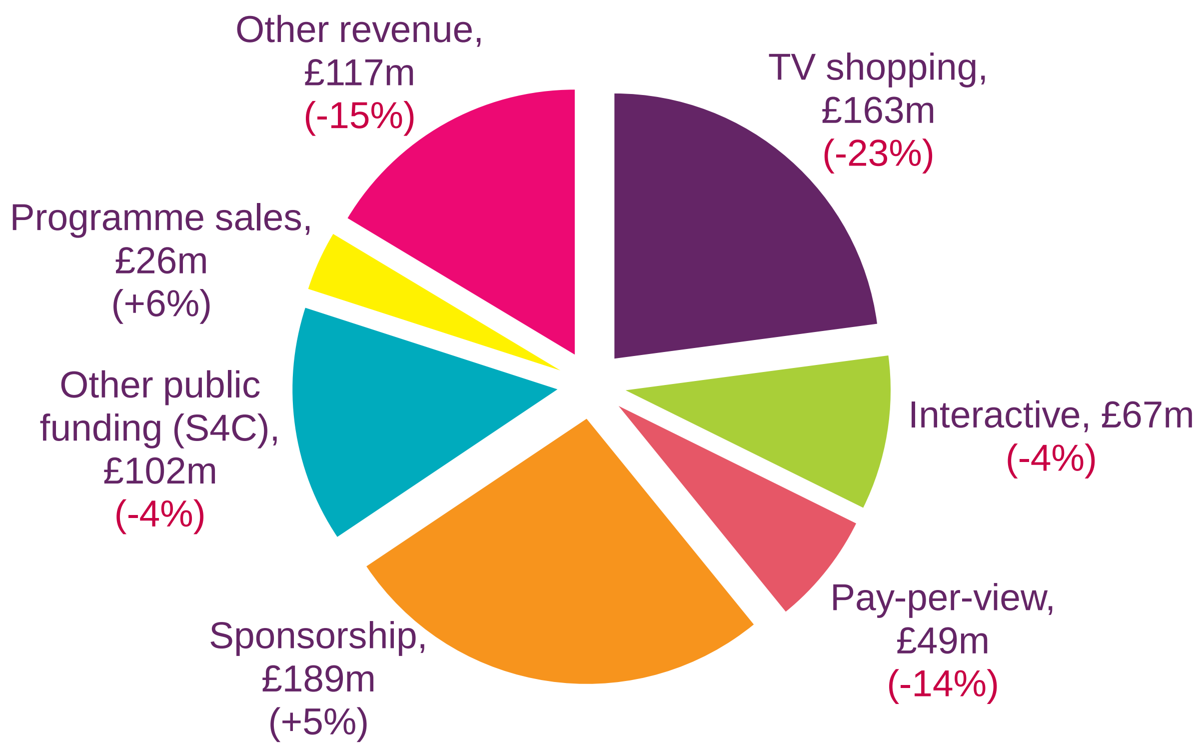
TV net advertising revenue market shares, 2008 - 2009



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

Breakdown of other/non-broadcast revenue, 2009

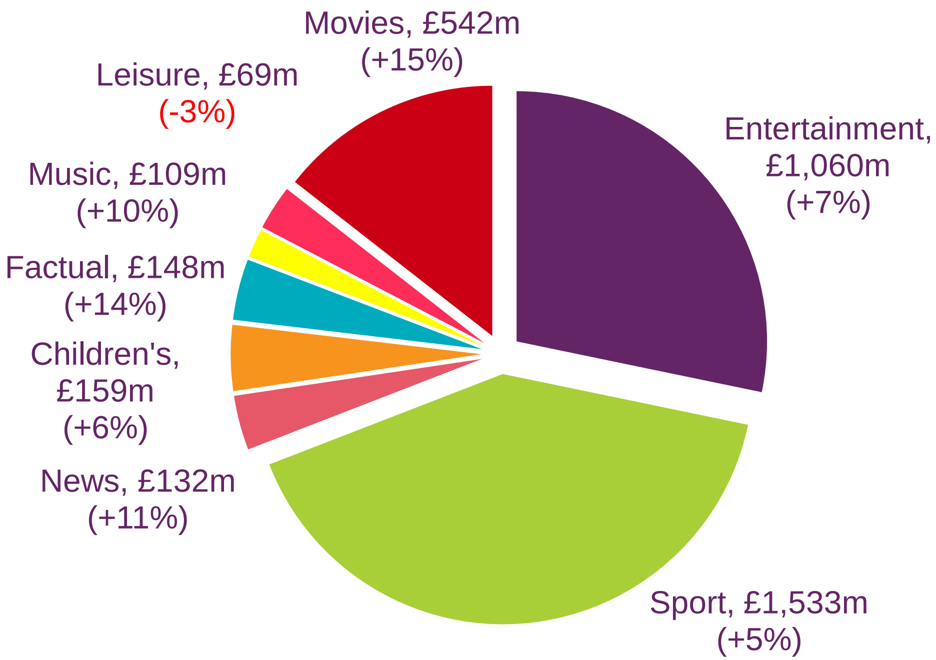
Total non-broadcast revenue = £713m (-9%)



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.

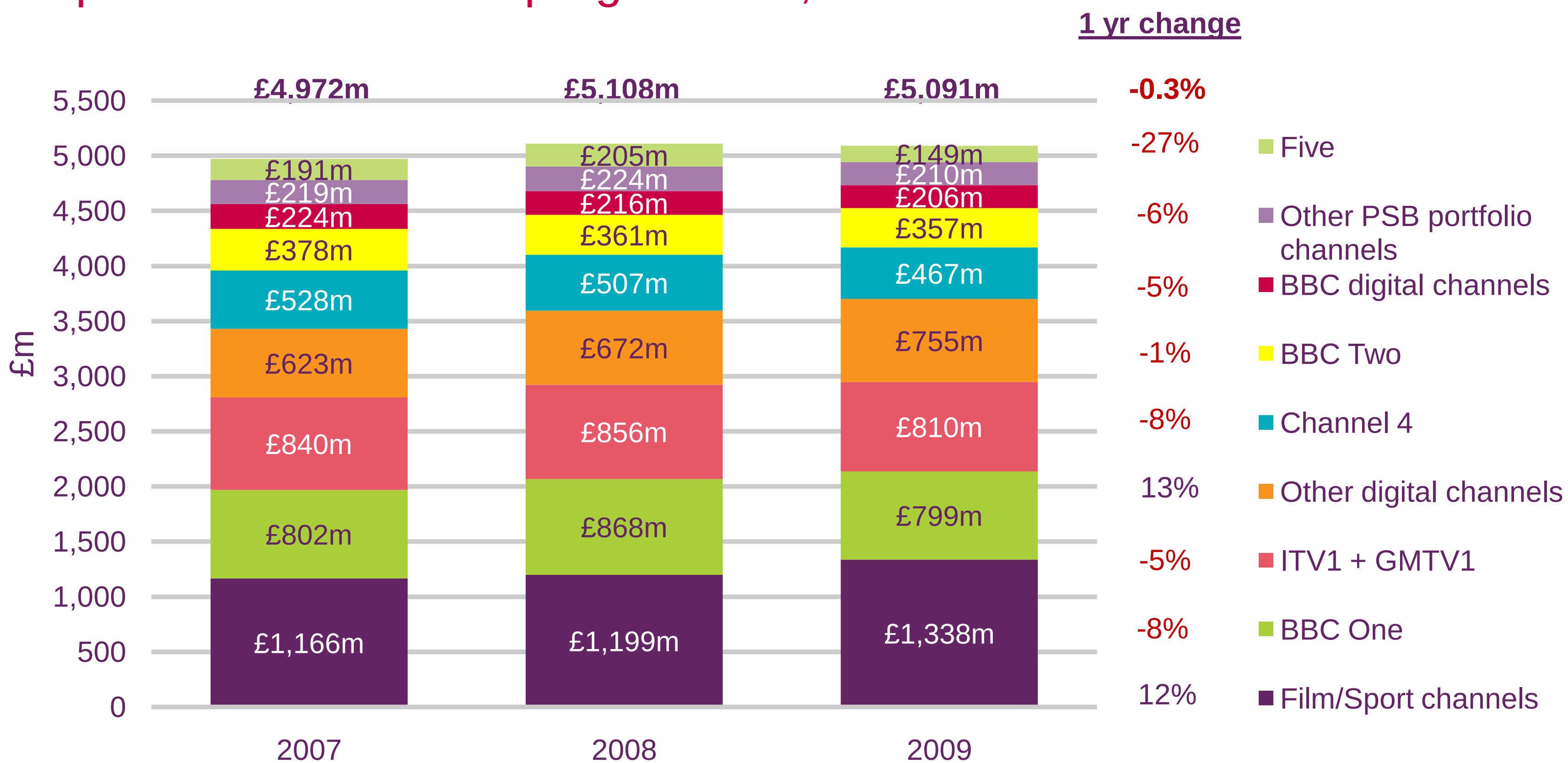
Revenue generated by multichannel broadcasters, by genre, 2009

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.

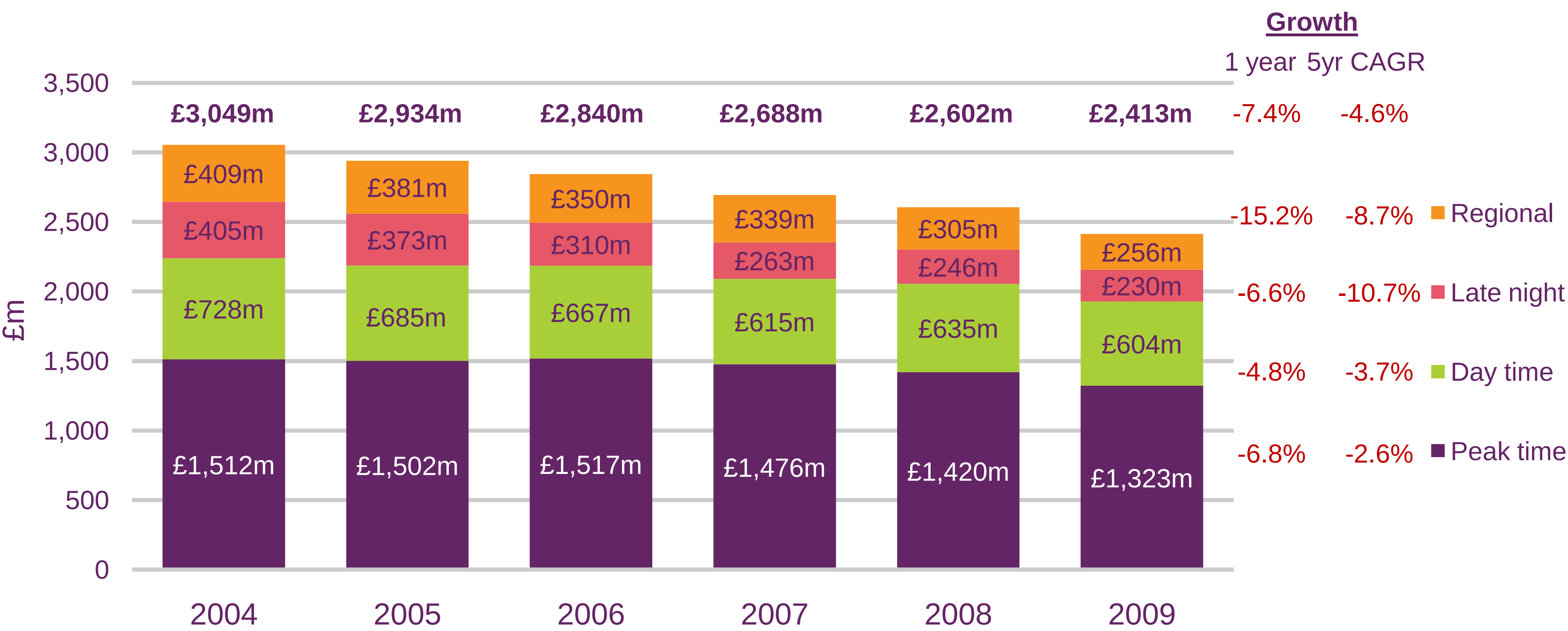
Spend on network TV programmes, 2007 - 2009



Source: Ofcom/broadcasters.

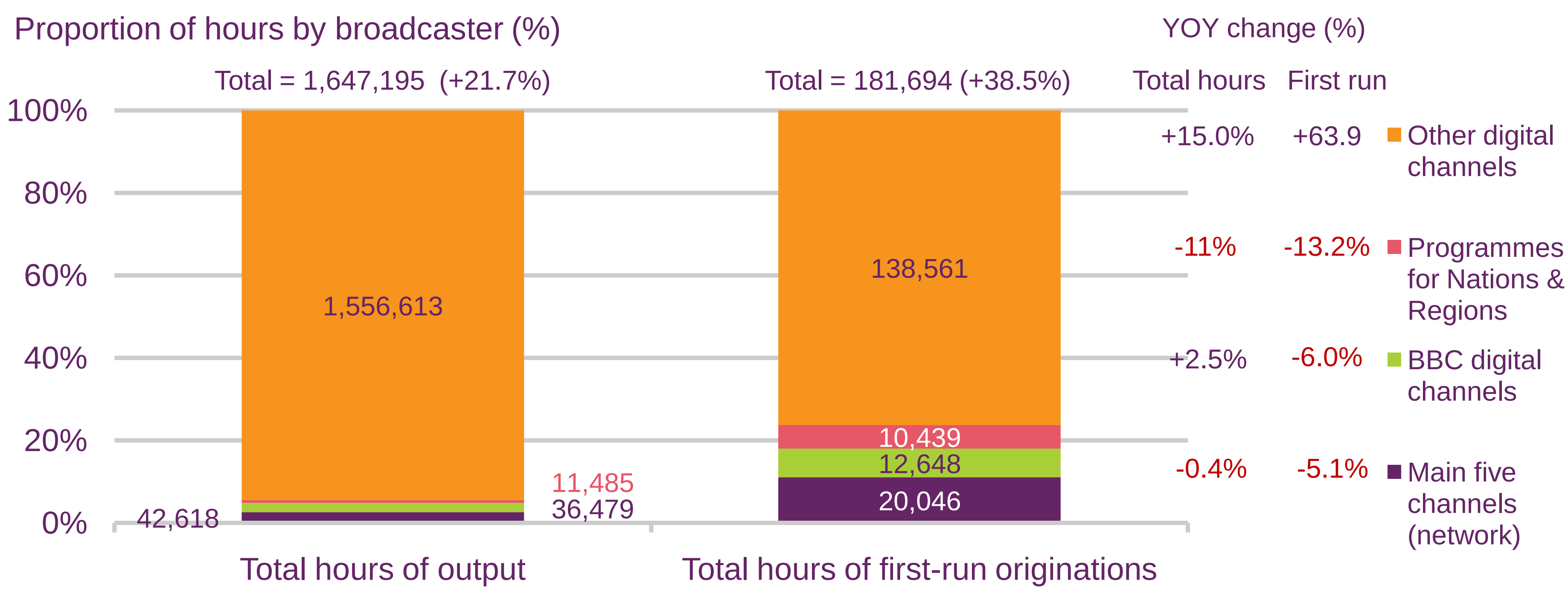
Note: Figures expressed in nominal terms. Figures do not include spend on nations and regions output. BBC digital channels includes BBC Three, BBC Four, BBC News Channel, BBC Parliament, CBBC and CBeebies (but not BBC HD). ‘Other digital channels’ include all genres (excluding Sports and Films). Programme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

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.

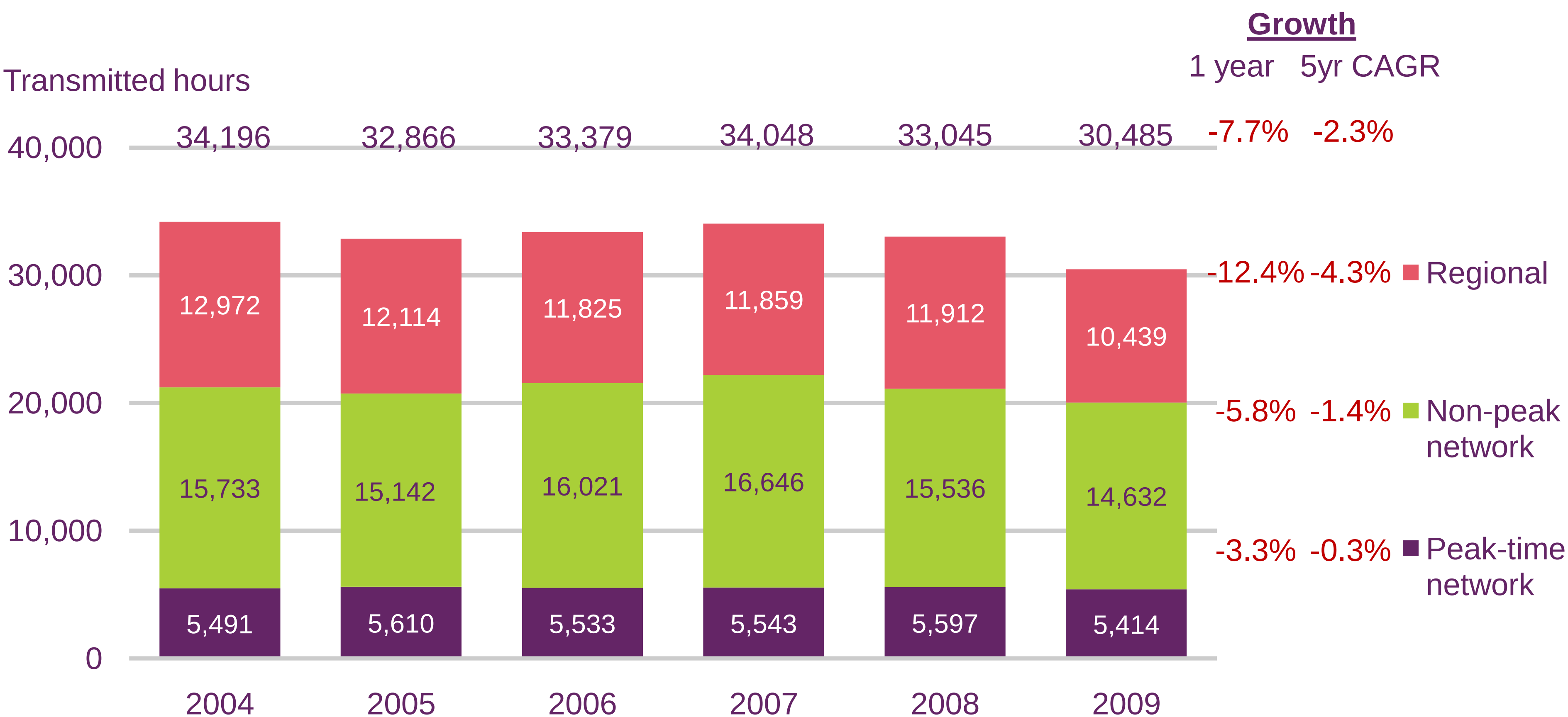
Total and first-run originated hours of output, all day, 2009



Source: Ofcom/broadcasters

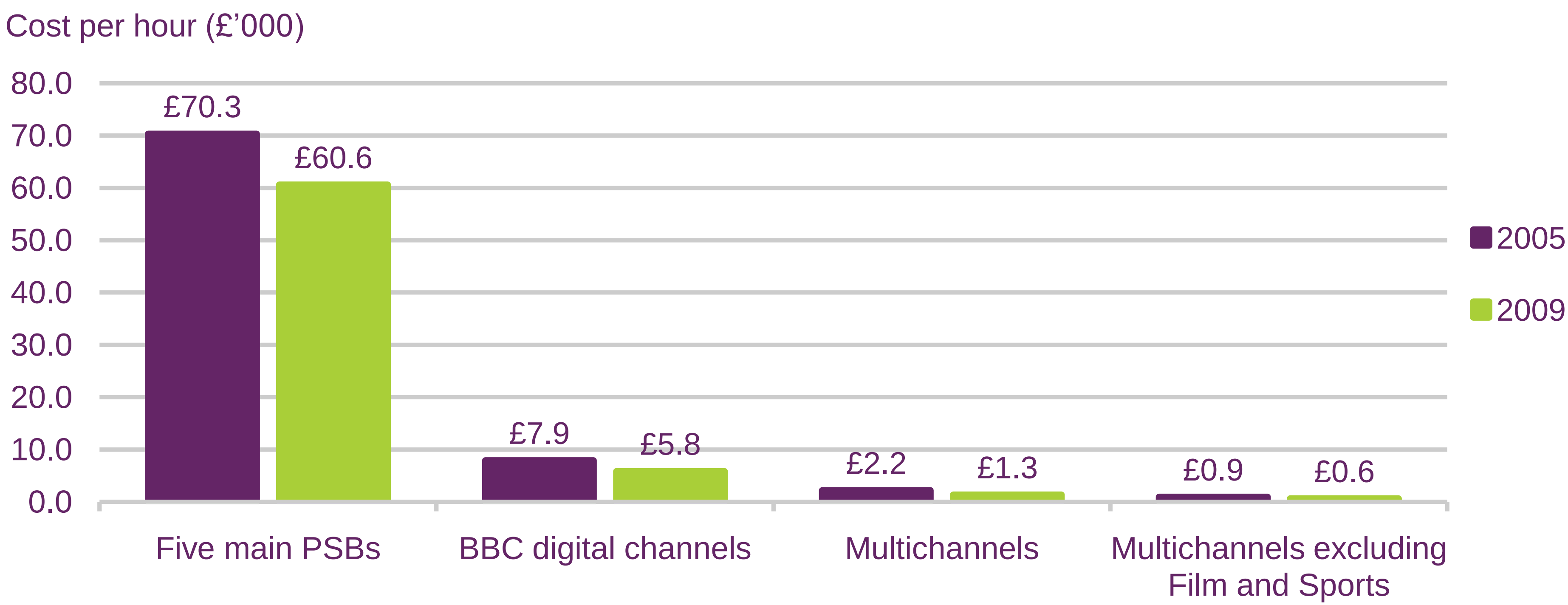
Note: Percentage figures in brackets represent year-on-year change. The first-run figures include in-house productions and external commissions, not first-run acquisitions. GMTV1 is included within the figures for the five main channels. ‘Other digital channels’ includes Entertainment, Sports, Film, 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.

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



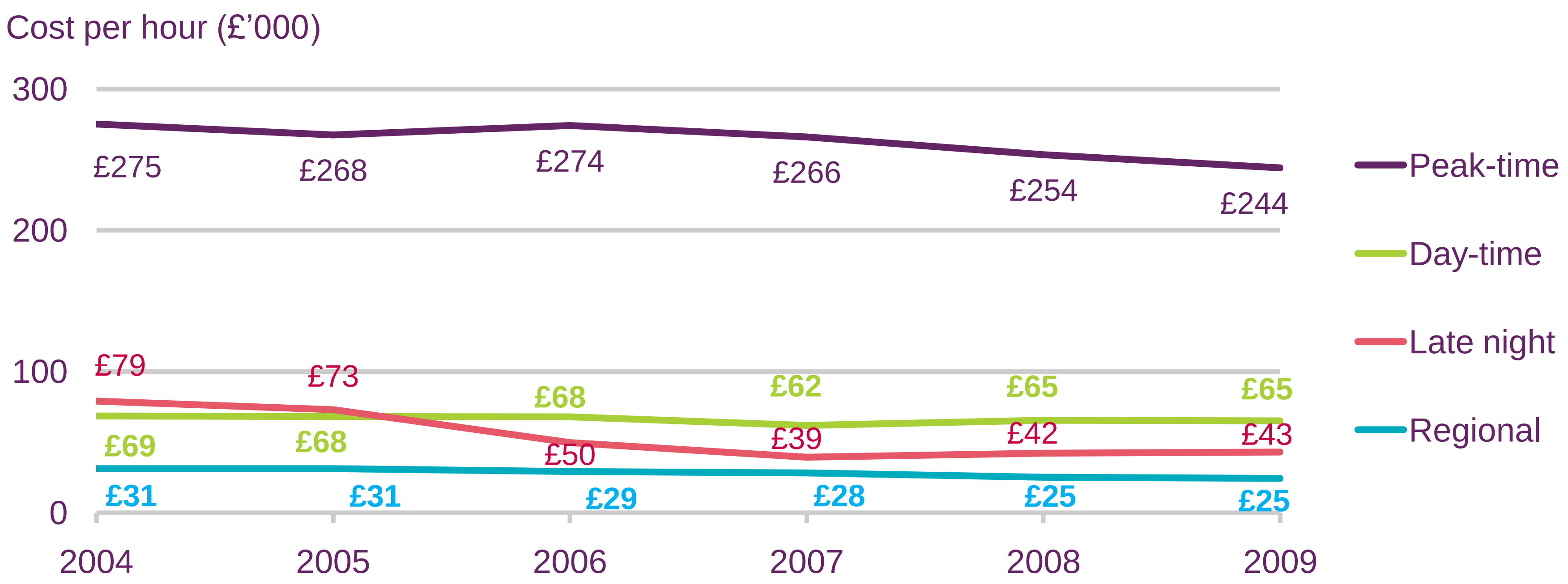
Source: Ofcom/broadcasters. Note: Figures include GMTV1 but do not include the BBC's digital channels. Regional hours exclude Welsh and Gaelic-language programming but do include a small proportion of Irish-language programmes.

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.

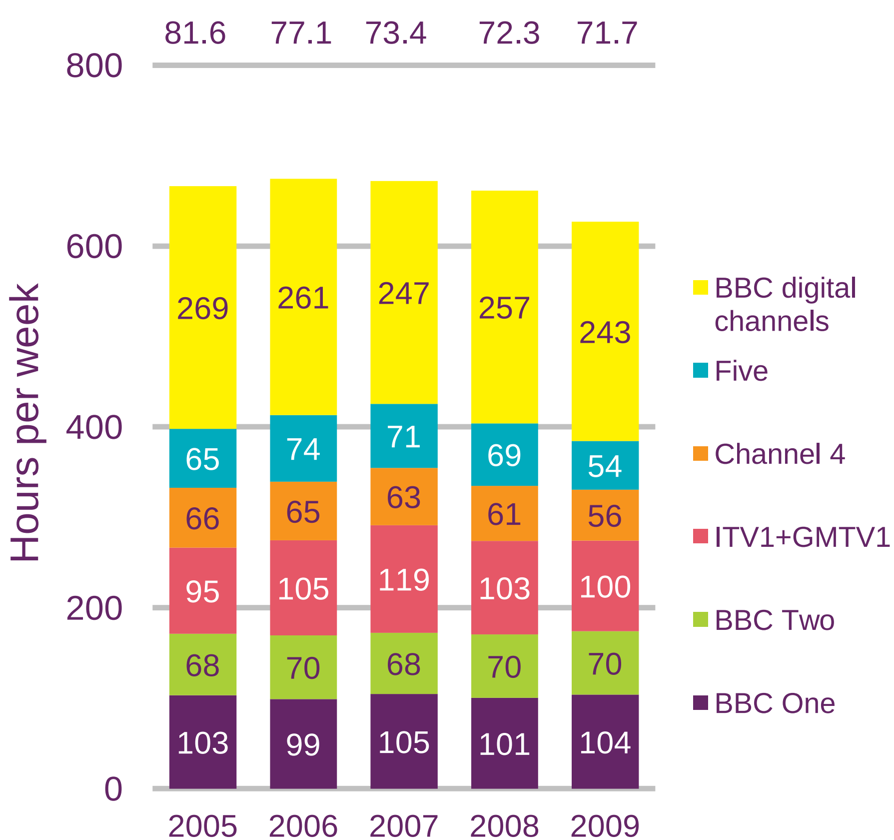
Cost per hour for first-run originated content on the five main networks



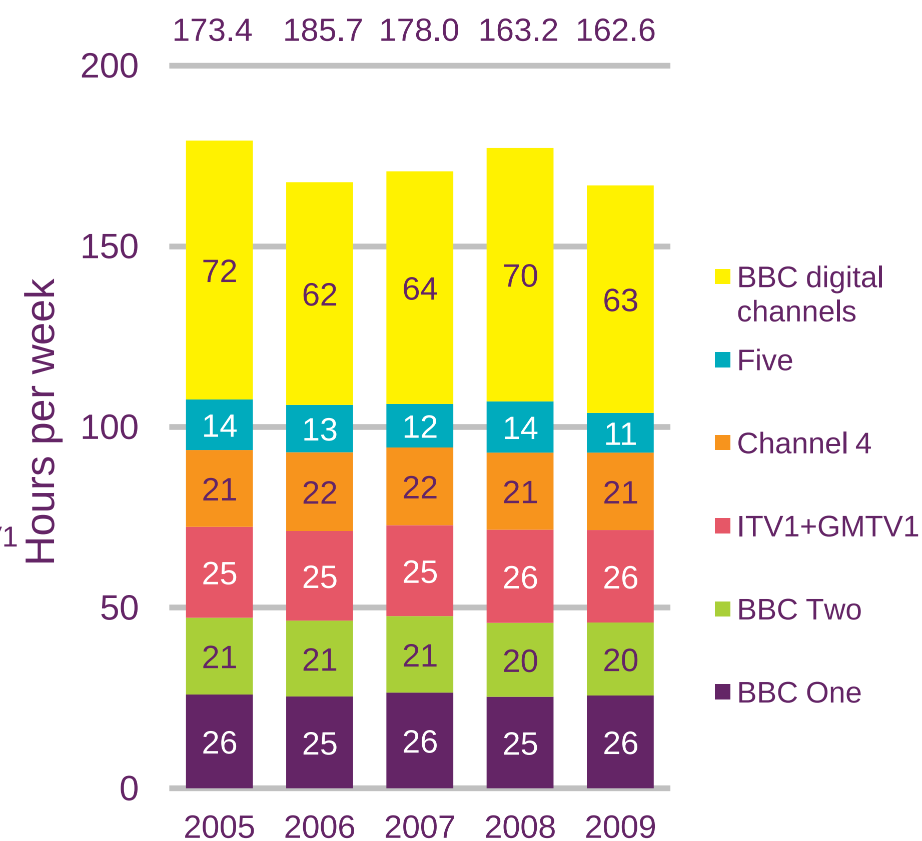
Source: Ofcom/broadcasters. Note: Figures are expressed in 2009 prices. They include GMTV1 but do not include the BBC's digital channels.

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

All-day cost/hour (£k, 2009 prices)



Peak cost/hour (£k, 2009 prices)

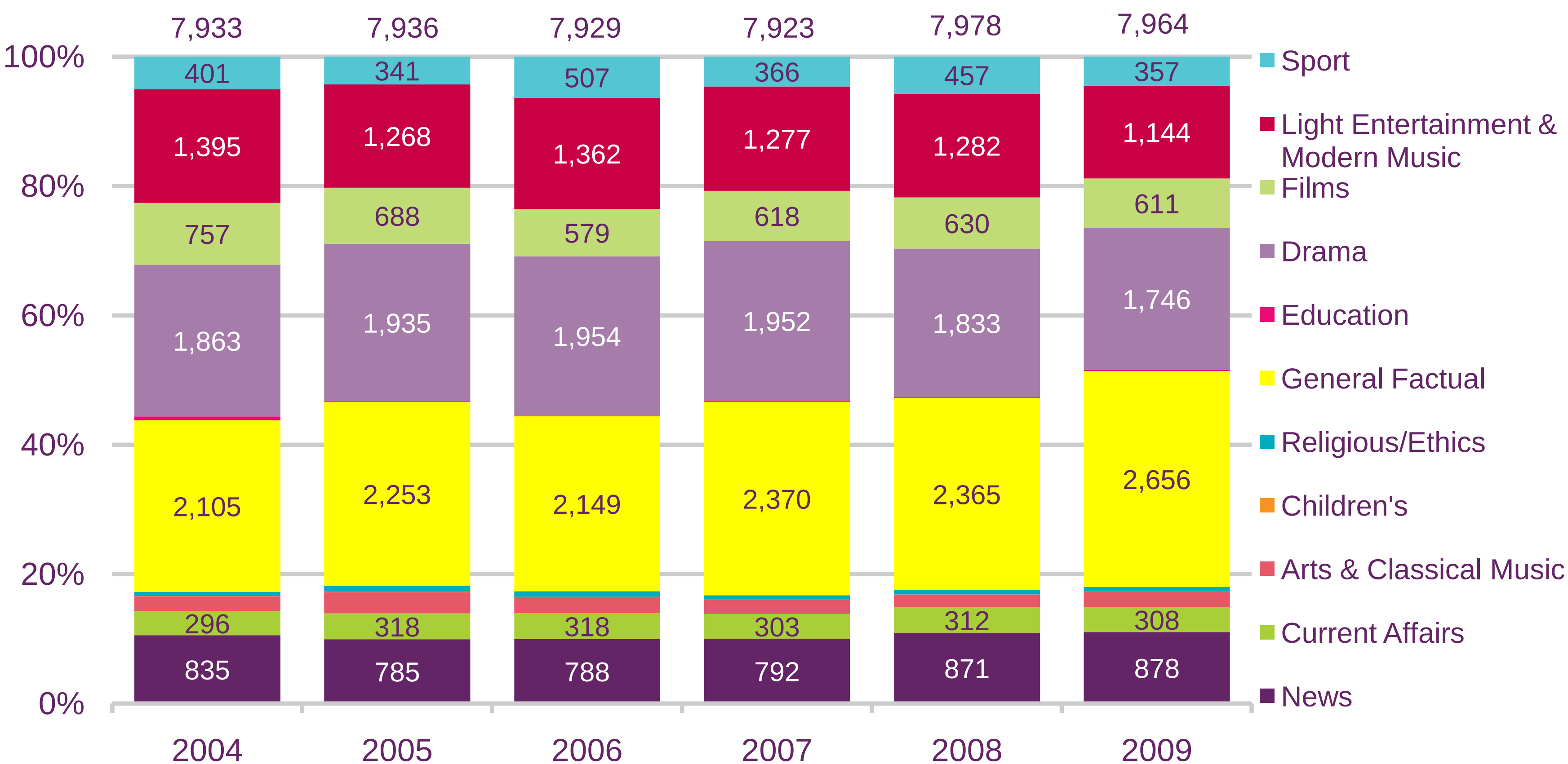


Source: Ofcom/broadcasters.

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

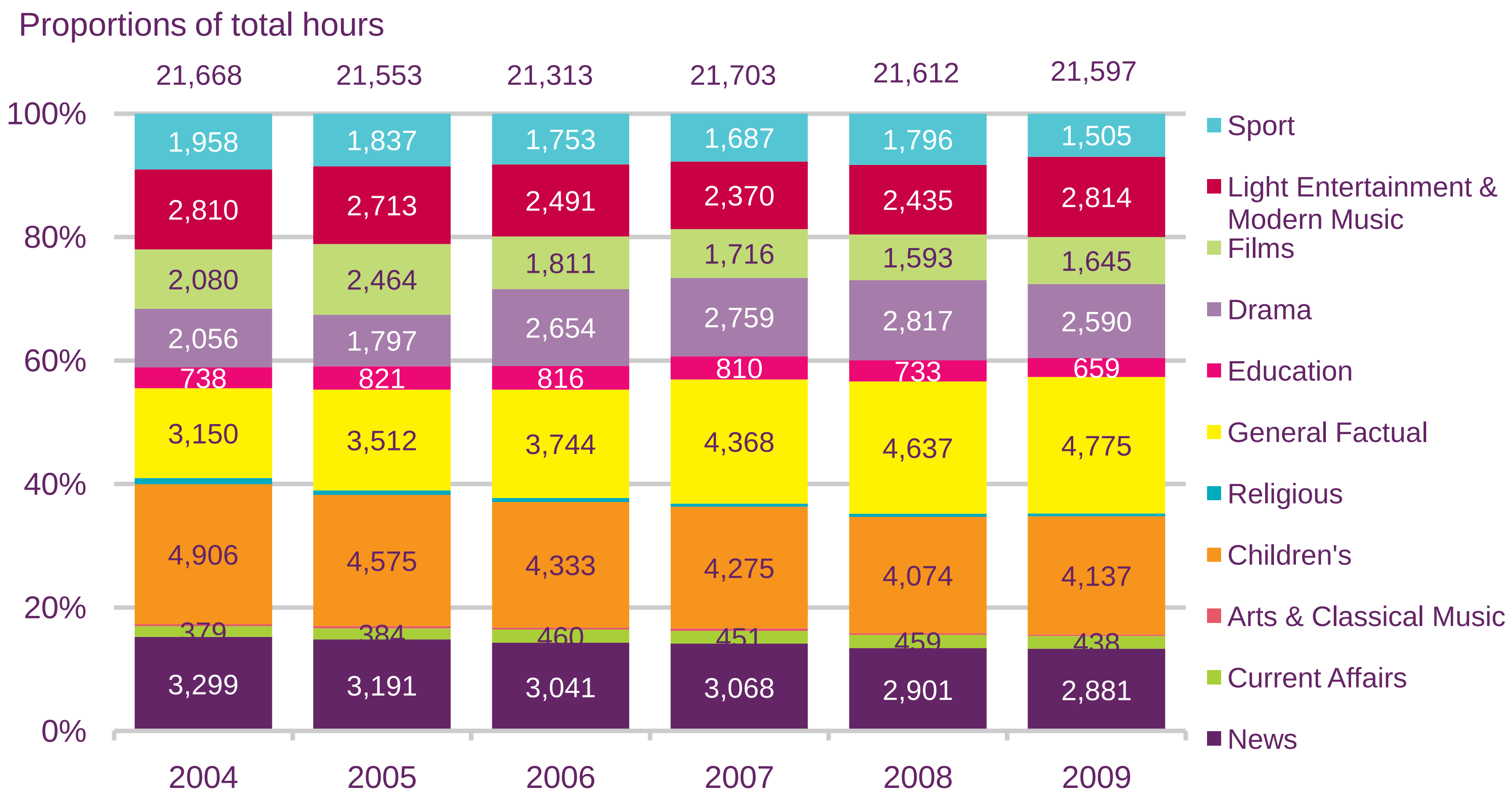
Genre mix on five main PSB channels in peak time, by hours

Proportion of total hours



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

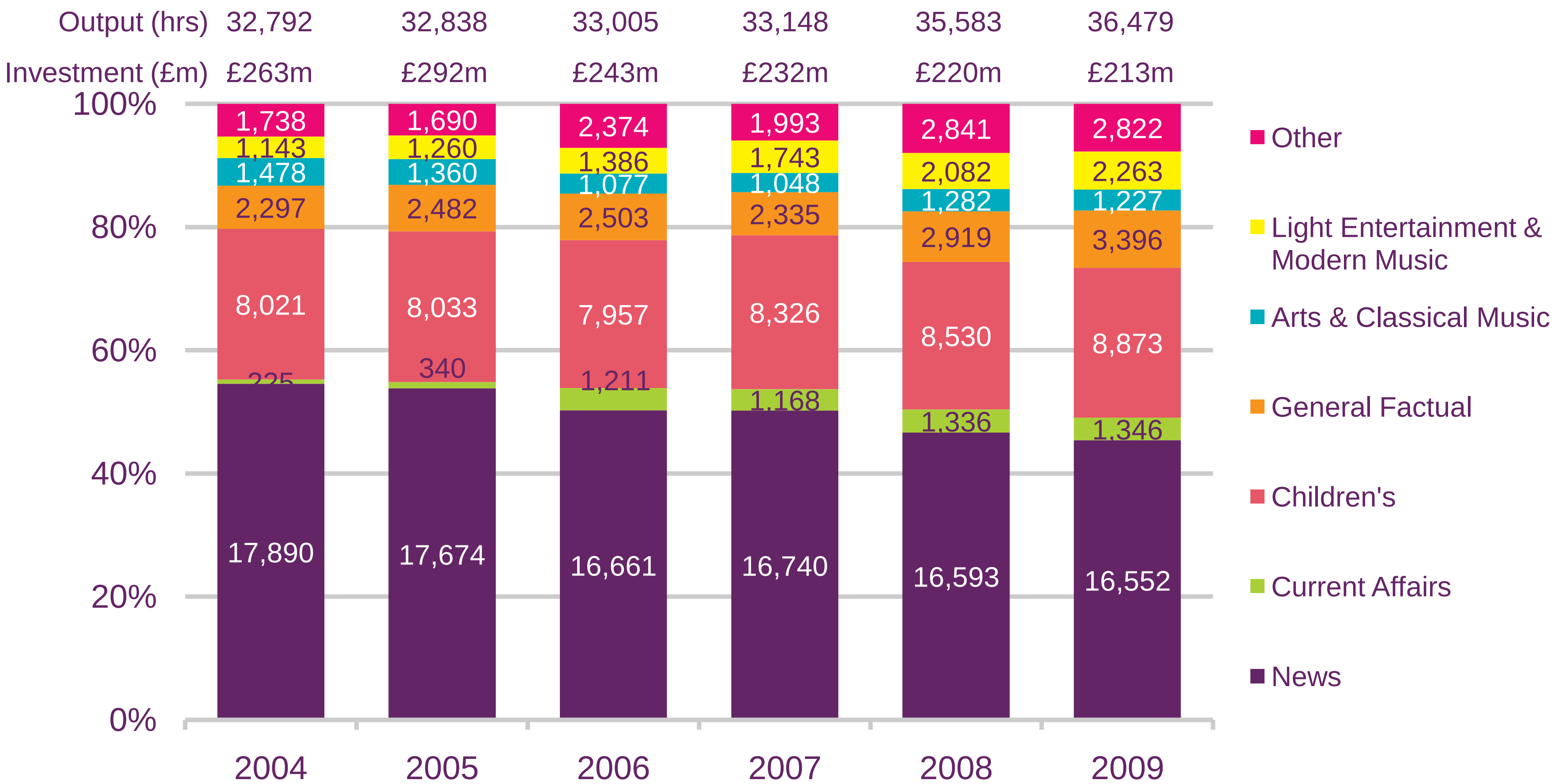
Genre mix on five main PSB channels in daytime



Source: Ofcom/Broadcasters

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

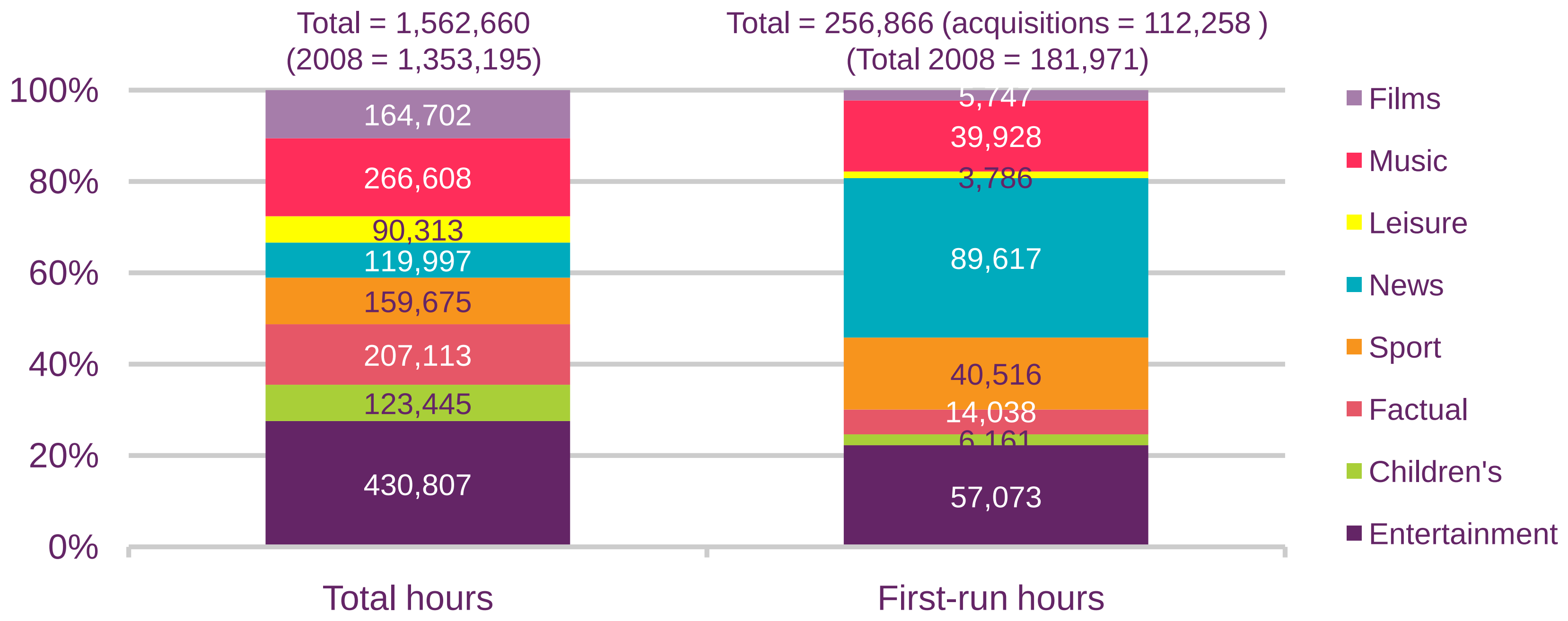
The BBC's digital channels genre mix by hours (all day)



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.

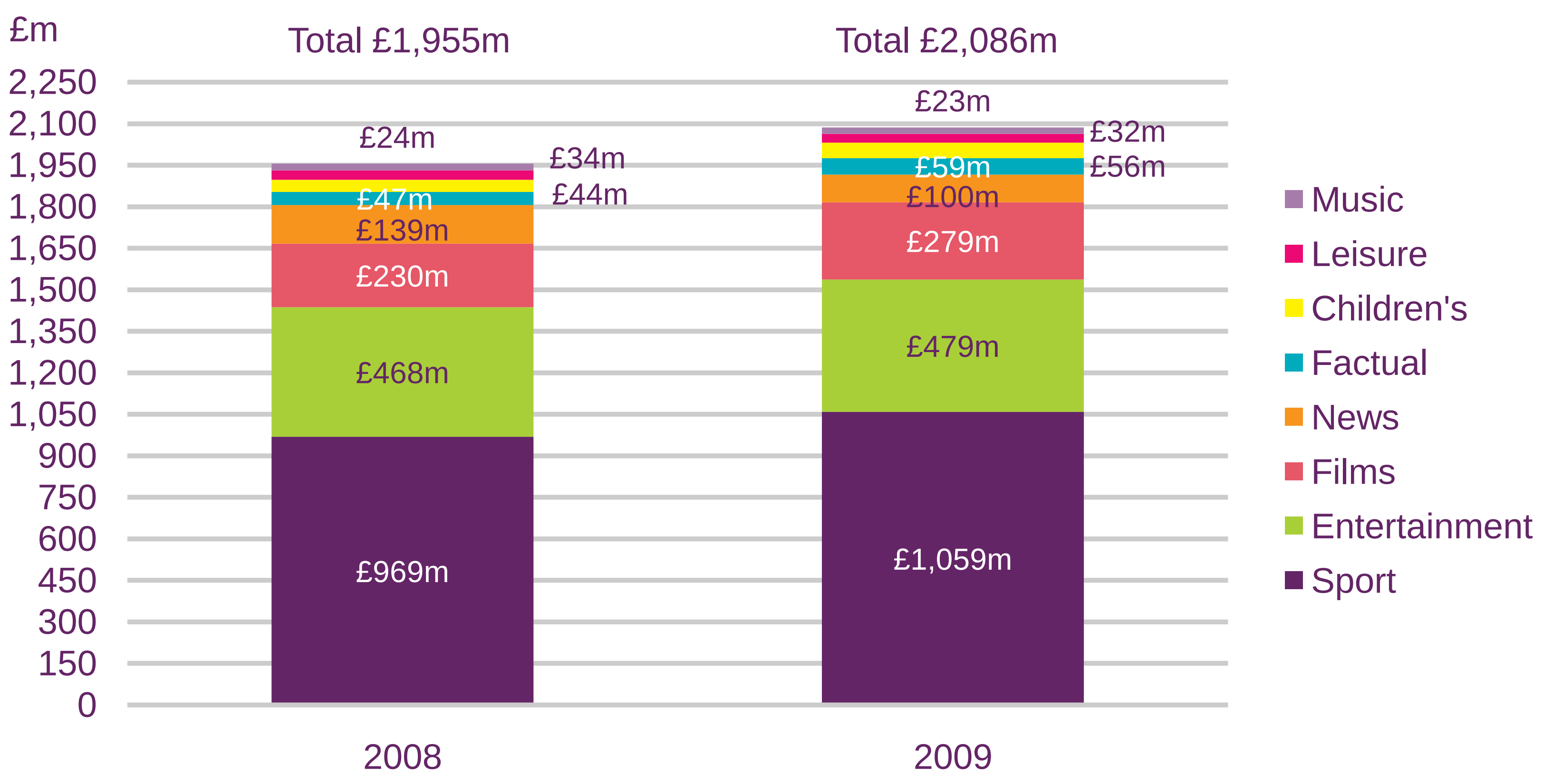
Total multichannel hours and first-run originations/acquisitions, 2009

Proportion of hours by channel genre (%)



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.

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

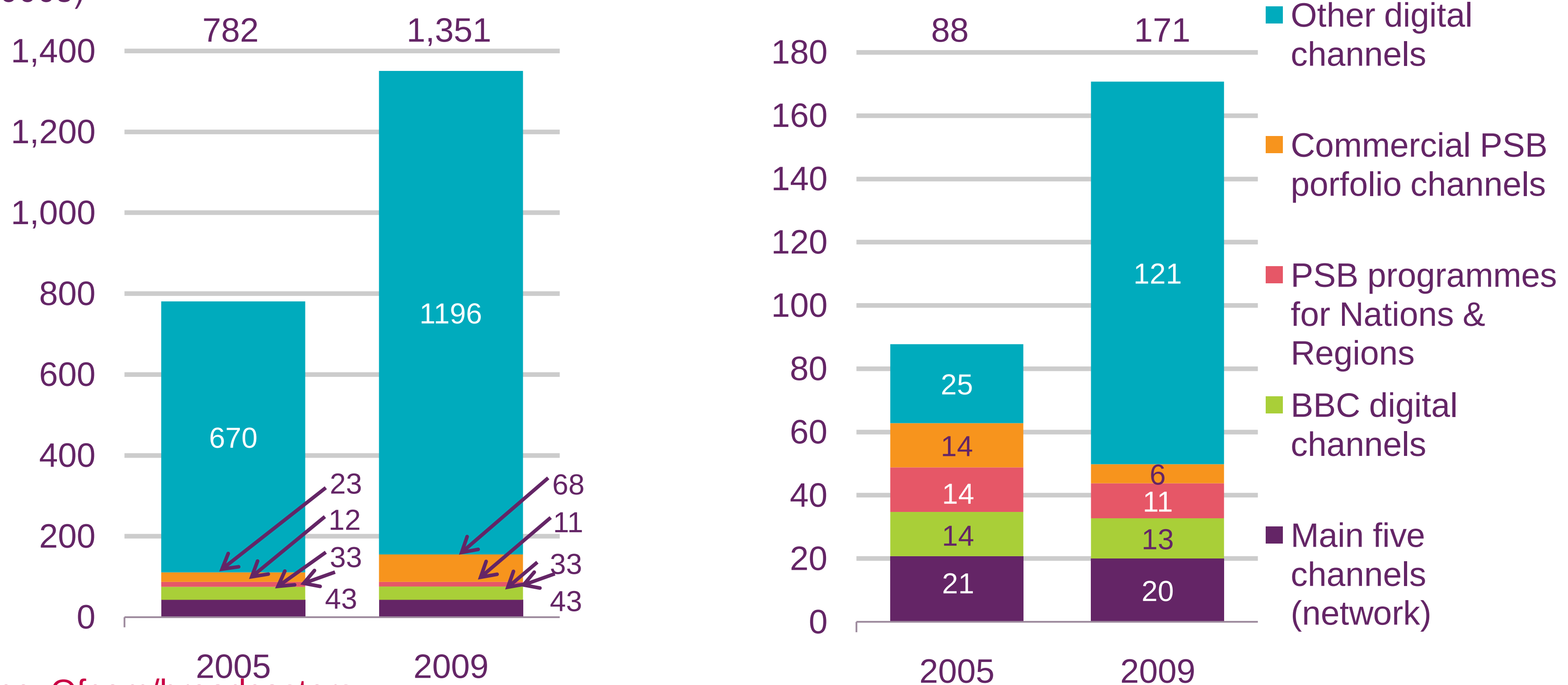


Source: Ofcom/broadcasters.
Note: Excludes BBC digital channels.

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

All hours of originated/acquired/repeated output ('000s)

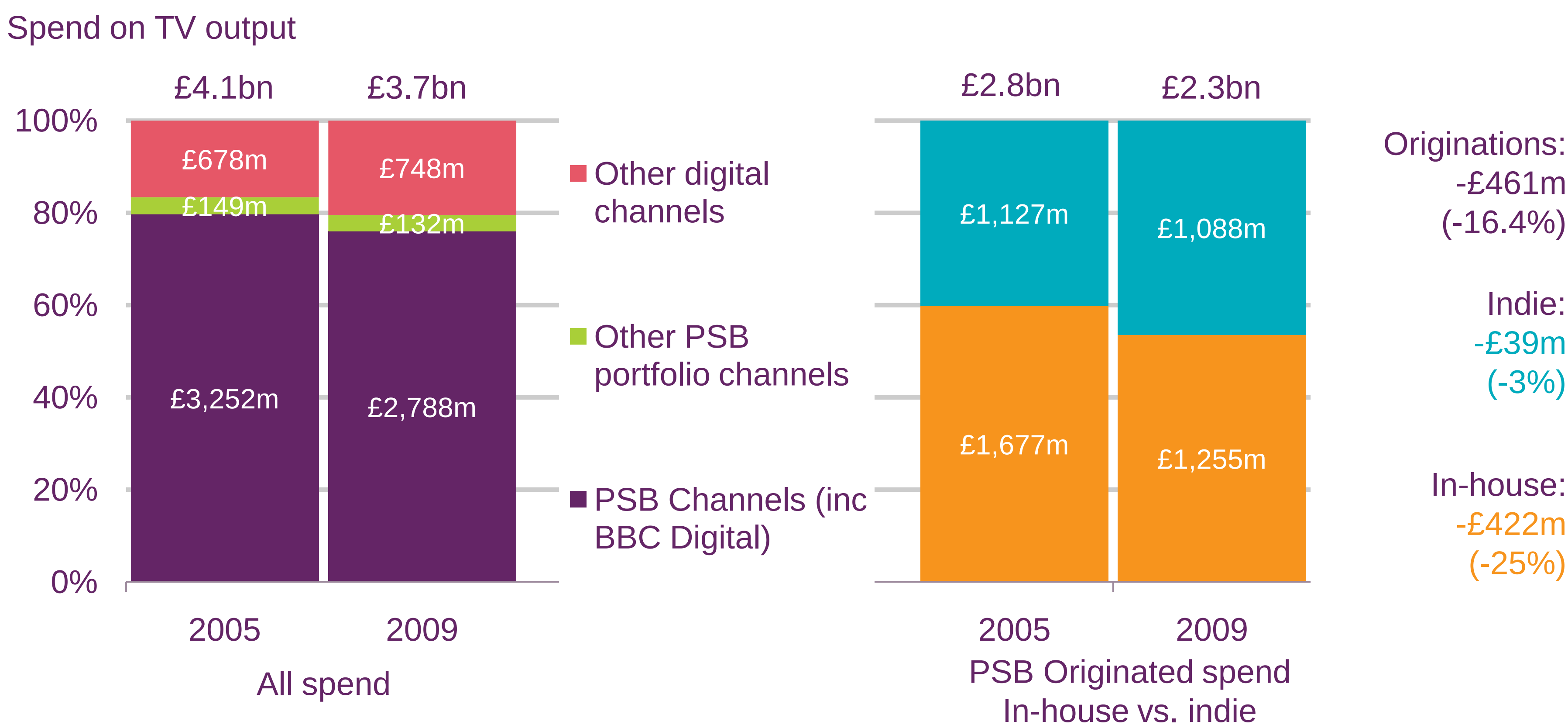
First-run originated hours ('000s)



Source: Ofcom/broadcasters.

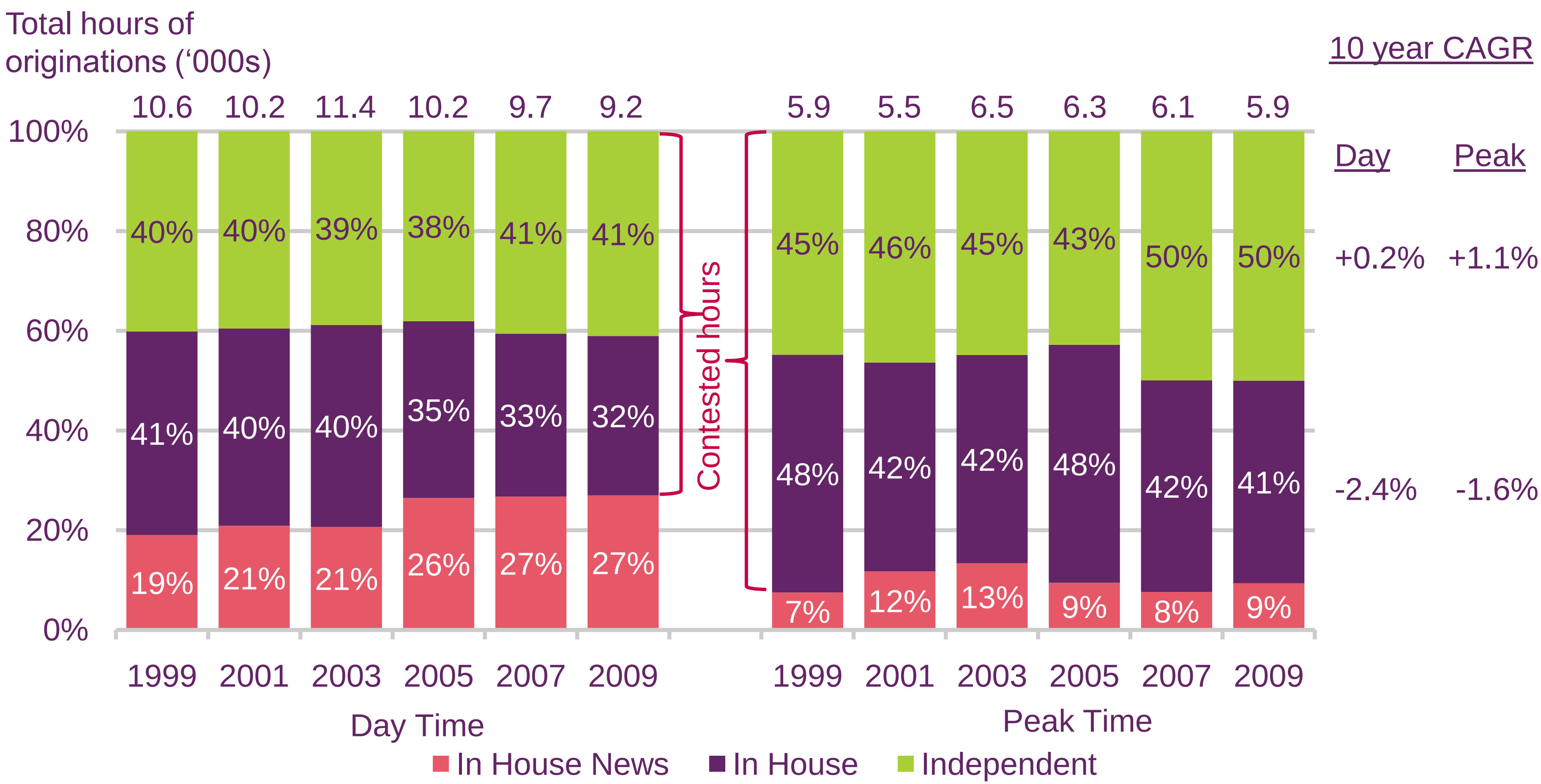
Note: The first-run figures include in-house productions and external commissions, not first-run acquisitions. 'Other digital channels' includes Entertainment, Factual, Children's, News, Leisure and Music genres.

Total broadcast spend on all channels, 2005 – 2009



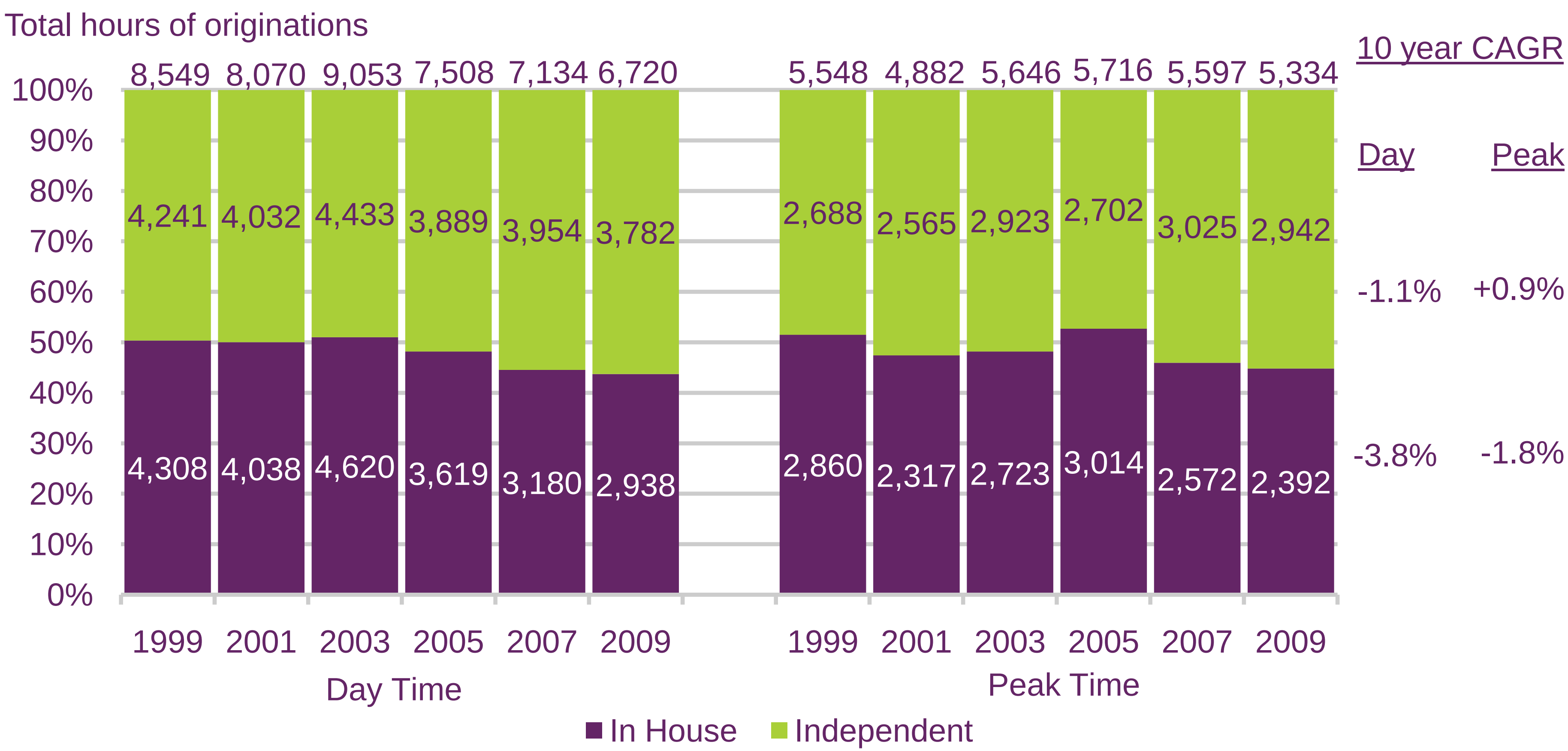
Source: Ofcom/broadcasters.
Note: Figures do not include nations & regions. BBC digital channels include BBC Three, BBC Four, BBC News, BBC Parliament, CBBC and CBeebies. GMTV included. 'Digital-only commercial channels' include all genres (excluding Sports and Film). Programme spend comprises in-house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

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.

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

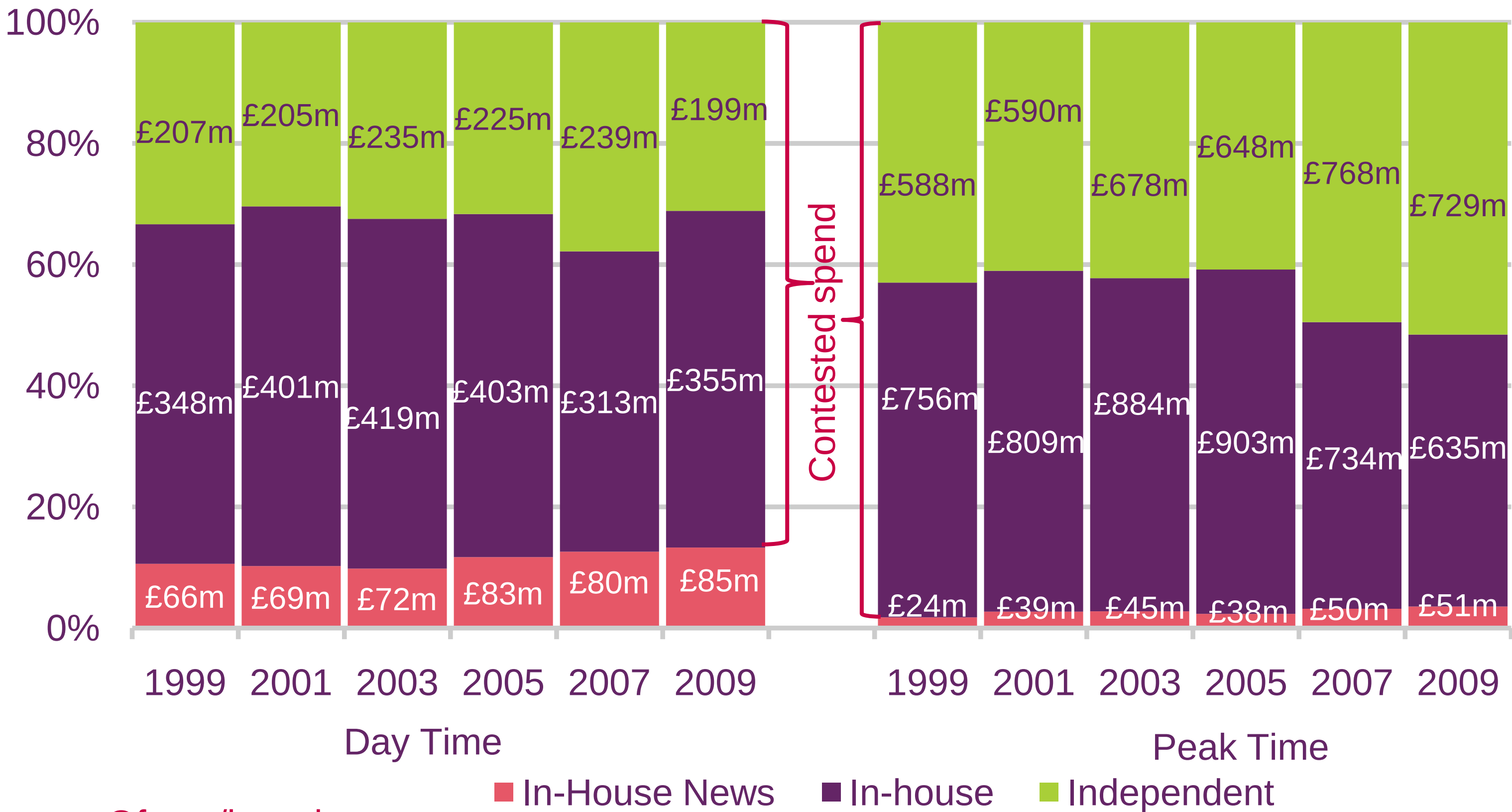


Source: Ofcom/broadcasters.

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

PSB originations – daytime and peak time, 1999 - 2009

Total spend on originated hours (£ millions)



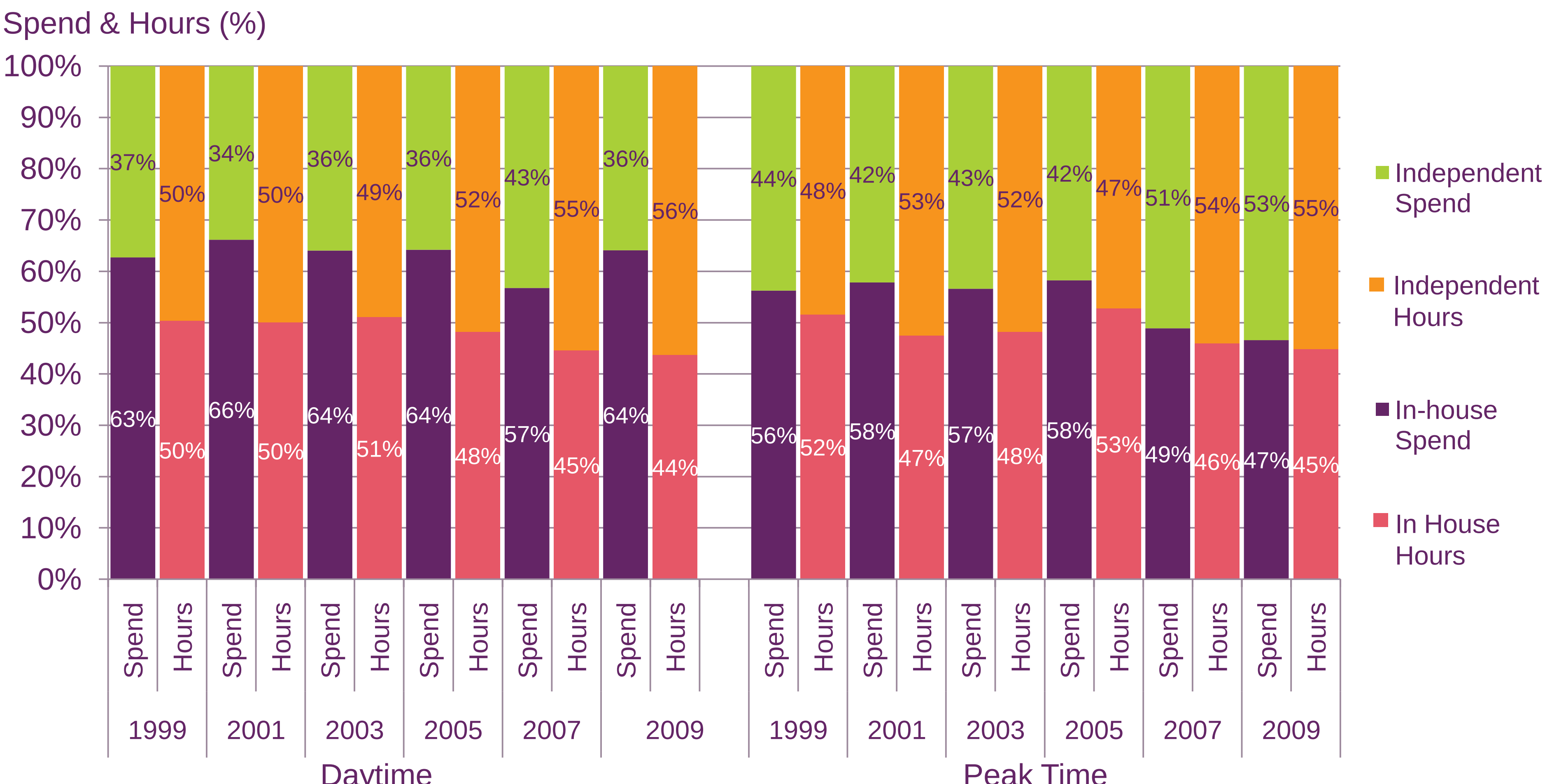
<u>10 year CAGR</u>

Day	Peak
-0.4%	+2.2%
+0.1%	-1.7%

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.

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



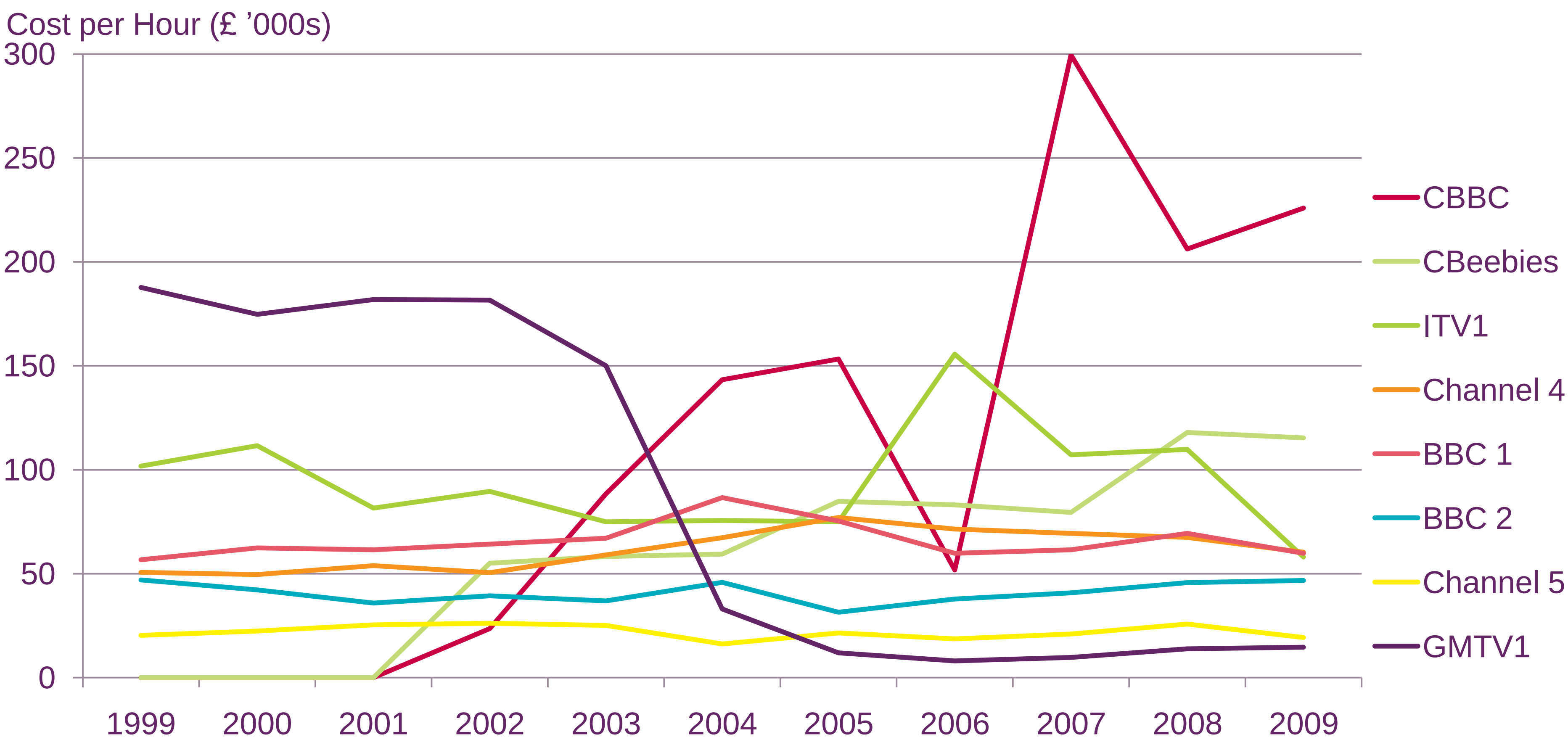
Source: Ofcom/broadcasters.

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.

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

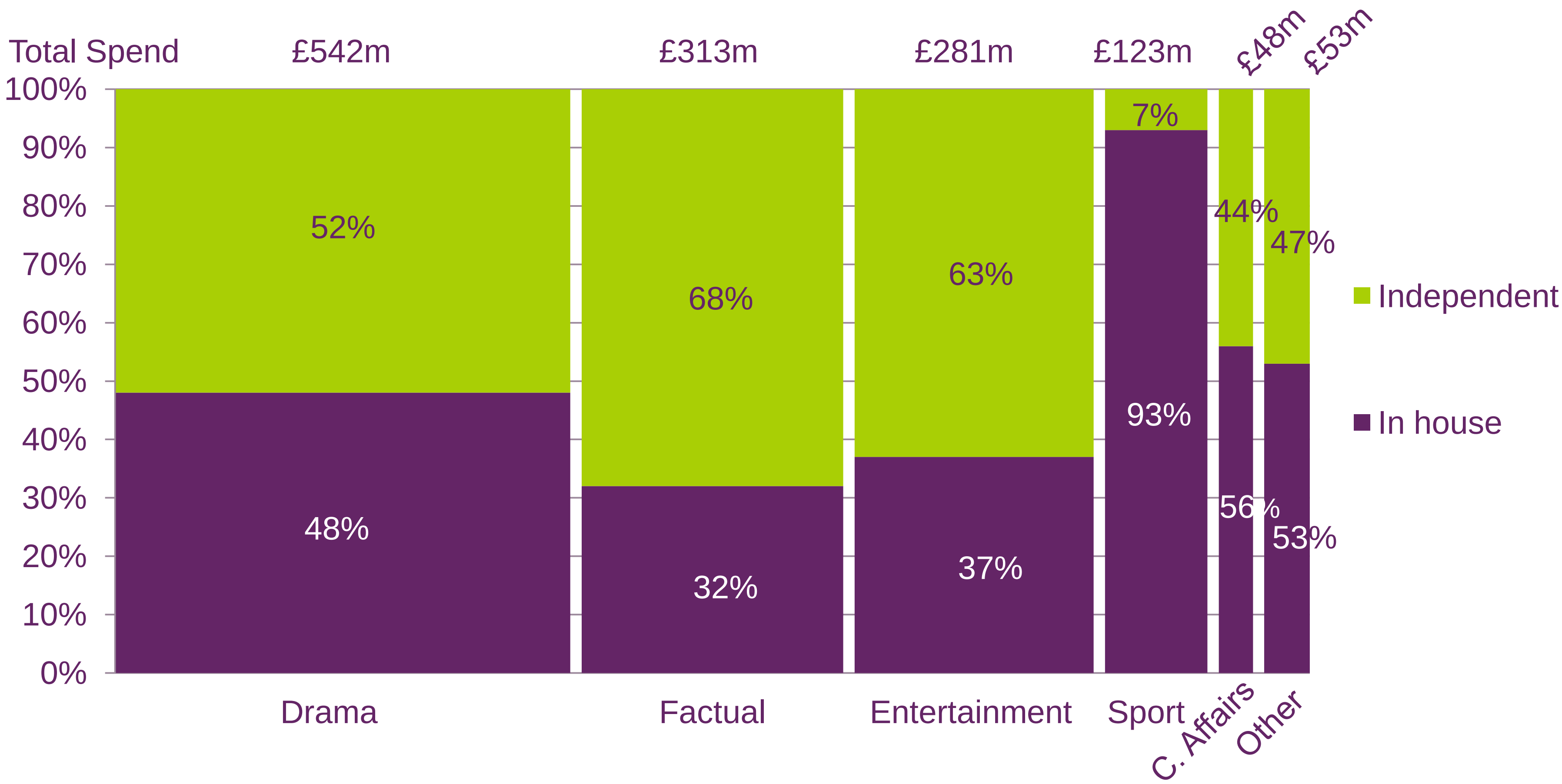
Source: Ofcom/broadcasters.
Note: Chart Includes five main networks and BBC Three, BBC Four, CBBC and CBeebies only. Figures exclude News. Figures expressed in 2009 prices.

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.

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.

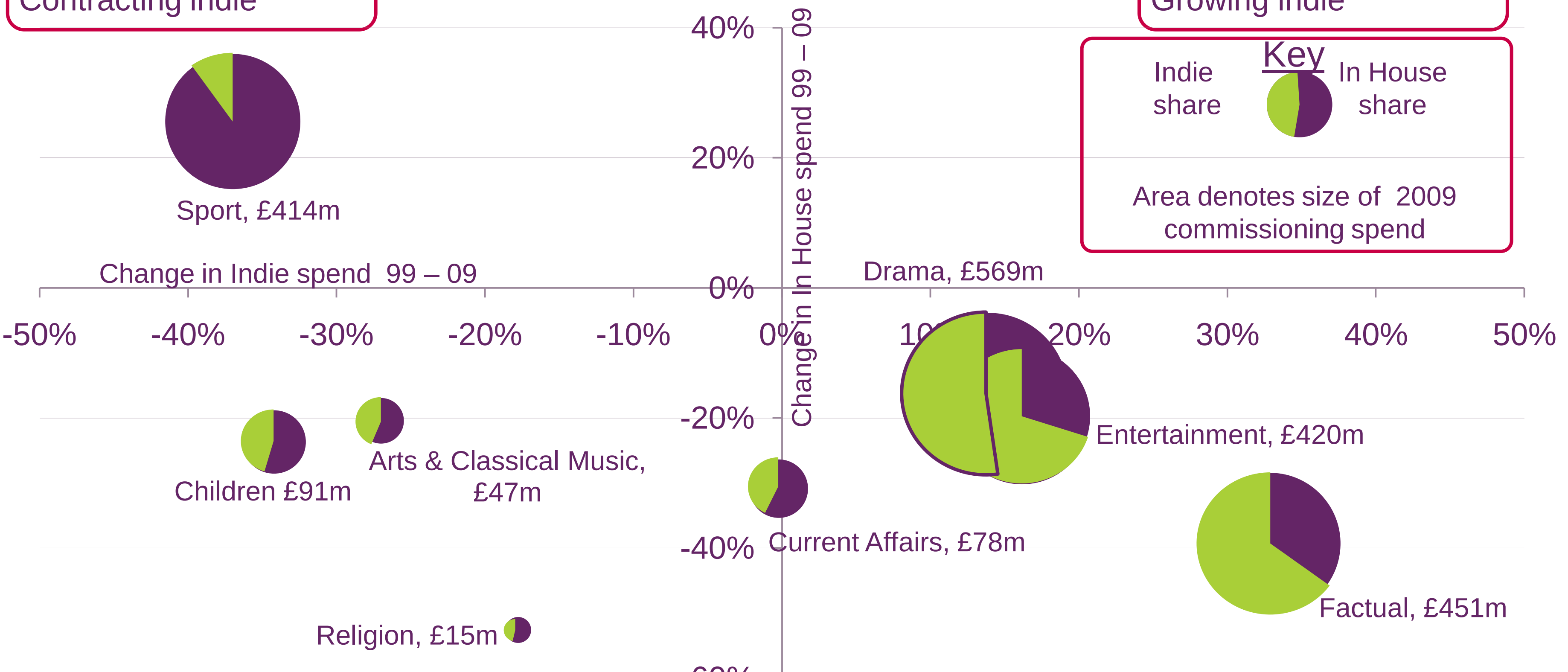
2009 distribution of PSB peak time spend and change over 10 year period 1999 – 2009 by genre

Source: Ofcom/Broadcasters.

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

Growing in-house spend
Contracting indie

Growing in-house spend
Growing indie

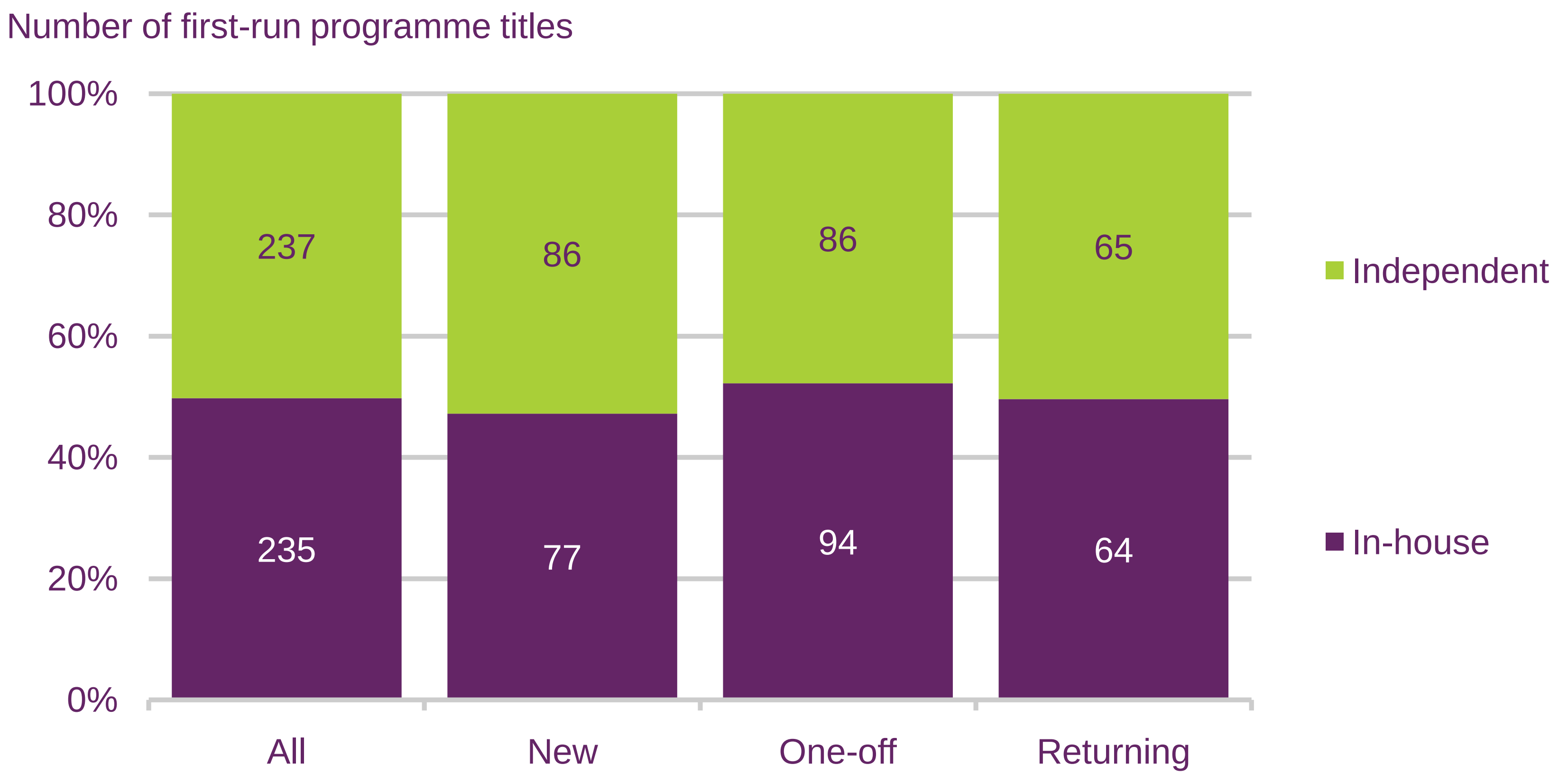


Contracting in-house spend
Contracting indie

Contracting in-house
Growing indie

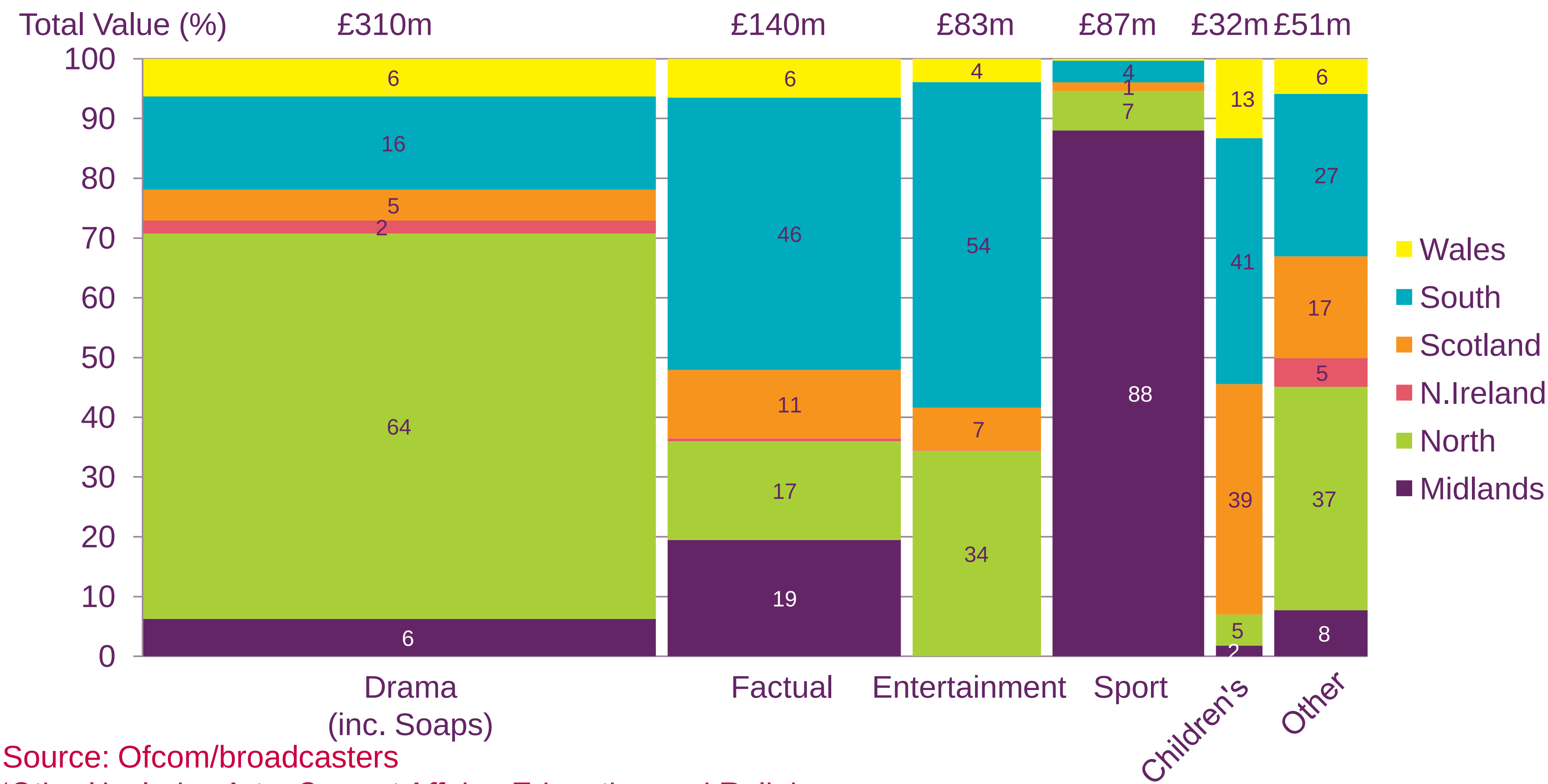
Source: Ofcom/broadcasters.

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



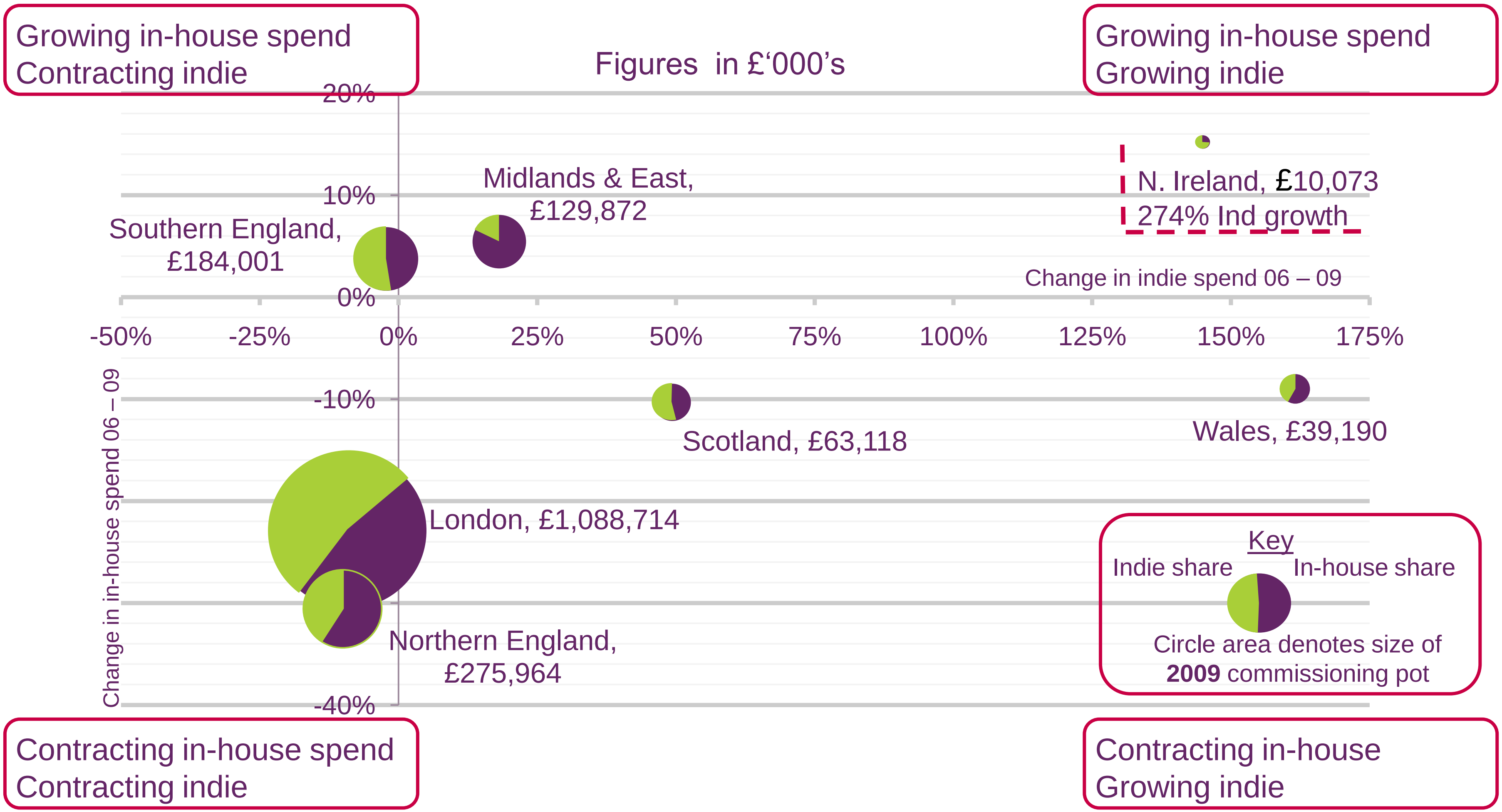
Source: Broadcasters
'New series' includes brand-new series and mini-series. 'One-off' includes one-off programmes and one-offs within series such as Panorama and Dispatches programmes. Programmes which form part of the core schedule, such as Eastenders, Coronation Street, News have been excluded. Sports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

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



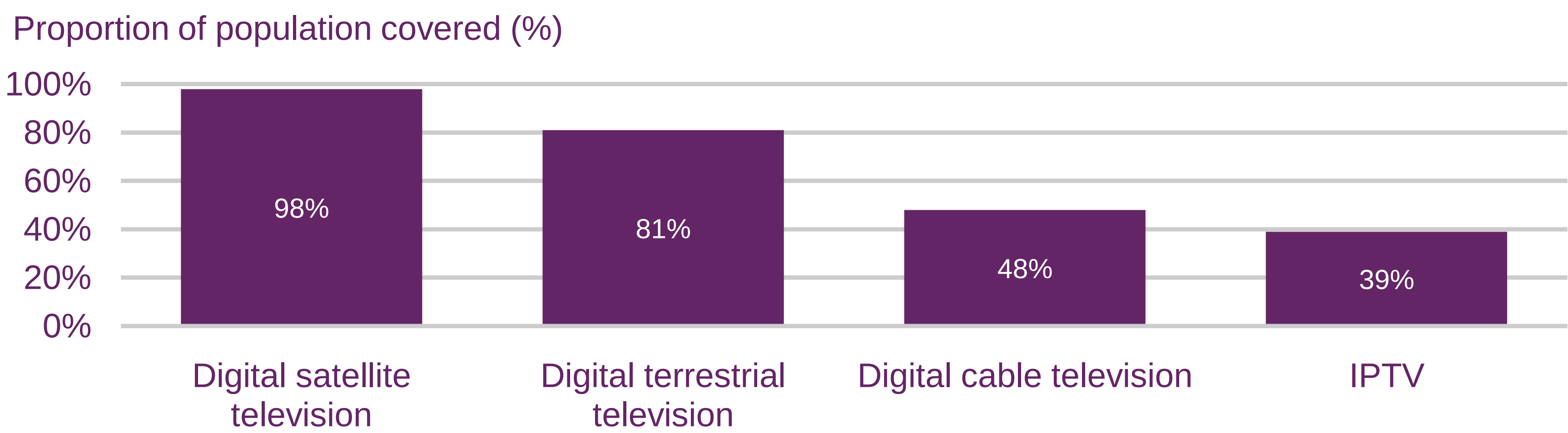
Source: Ofcom/broadcasters
'Other' includes Arts, Current Affairs, Education and Religion

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



Source: Ofcom/broadcasters.

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.

Radio and audio: data release

August 2010

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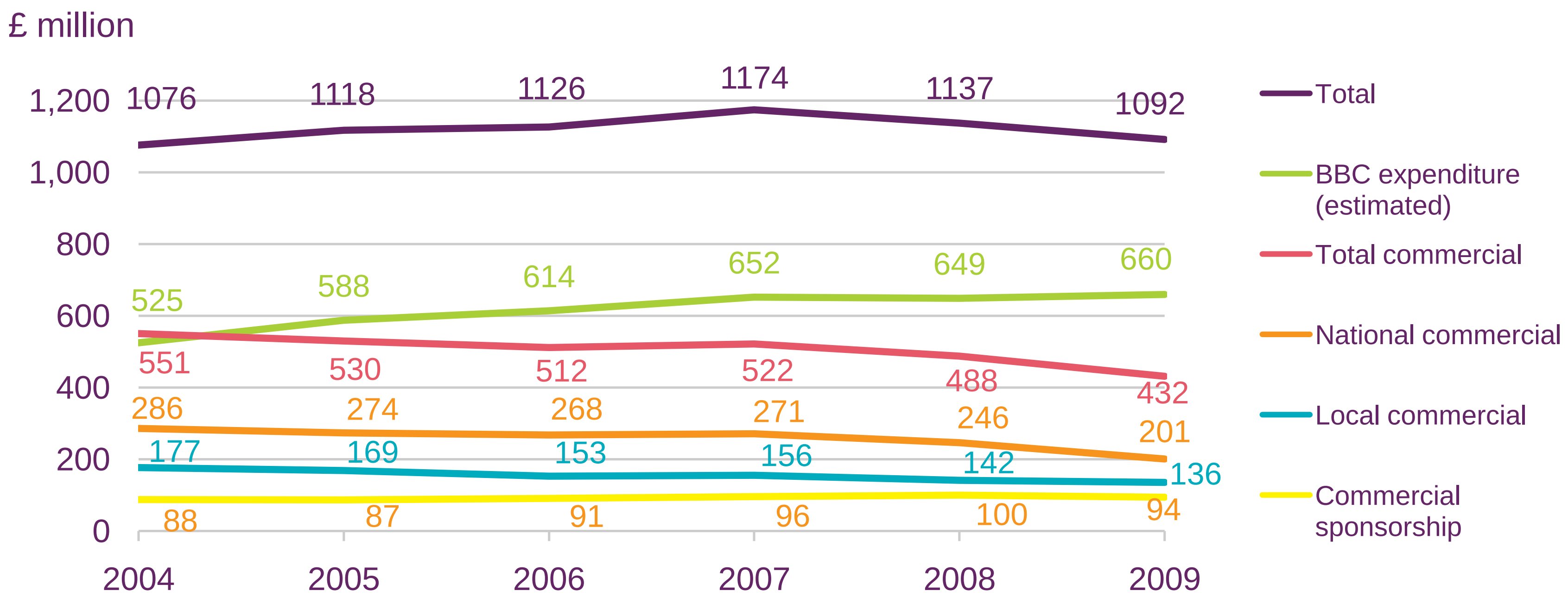
UK commercial radio revenue and BBC radio spending



Source: Ofcom / operator data / BBC, 2004-2009

Notes: BBC expenditure figures are estimated by Ofcom based on figures supplied by the BBC; figures in the chart are rounded.

Commercial radio revenue per listener

Source: Licensee revenue data and RAJAR listening data, 2004-2009

UK radio stations broadcasting on analogue, DAB digital radio, and community radio, July 2010

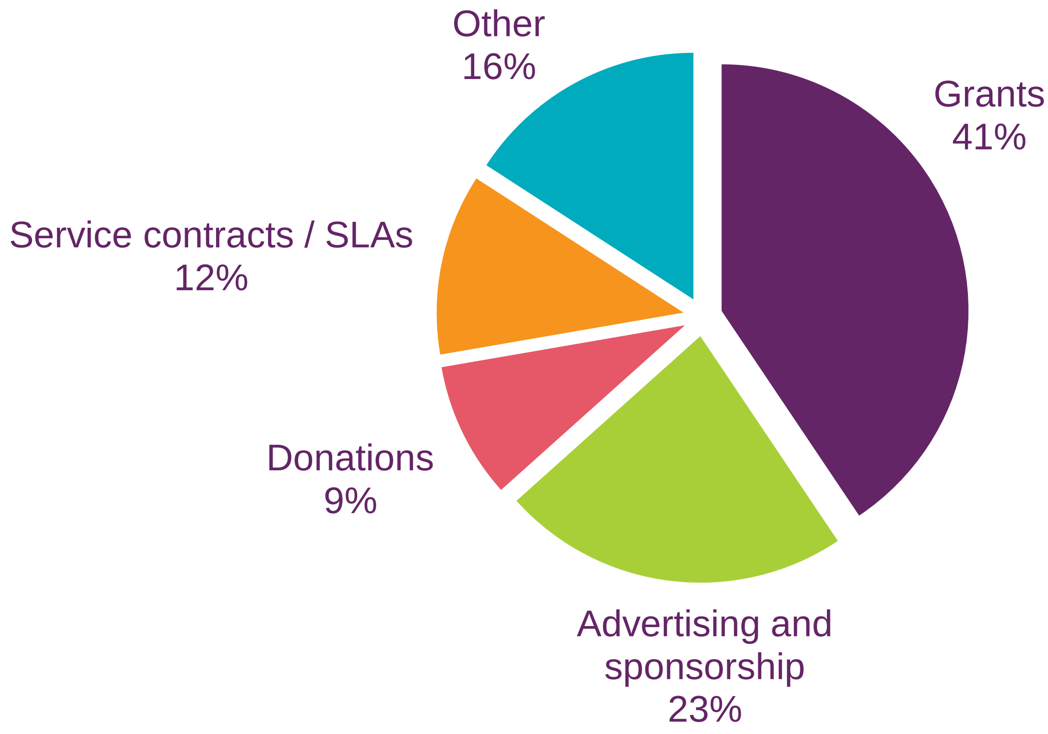
Type of station	AM	FM	AM/FM total	DAB	Total
Local commercial	31	203	234	139	267
UK-wide commercial	2	1	3	10*	10
BBC UK-wide networks	1	4	5	11	11
BBC local and nations	36	46	46	32	46
Community radio	4	172	176	0	176
TOTAL	**74**	**426**	**464**	**192**	**510**

Source: Ofcom, July 2010

Note 1: In total there are 288 individual analogue services on AM/FM as 36 simulcast over both AM/FM wavebands. Of the 288 analogue stations and 191 DAB stations, there are 334 unique stations, as 46 stations are digital-only brands.
*The existing Digital One national DAB radio multiplex does not offer coverage of Northern Ireland.
Note 2: A single radio brand may broadcast to many different parts of the country, using different technologies. For each area/technology combination, Ofcom issues a distinct broadcast licence (where it is licensable). The conditions of each licence will determine the amount of programming that may be shared between these licensed services. Here we have taken the view that a service providing at least four hours a day of separate programming (even if the same brand has other services) equals one service.

Community radio income, by source

Community radio stations' income 2008/09



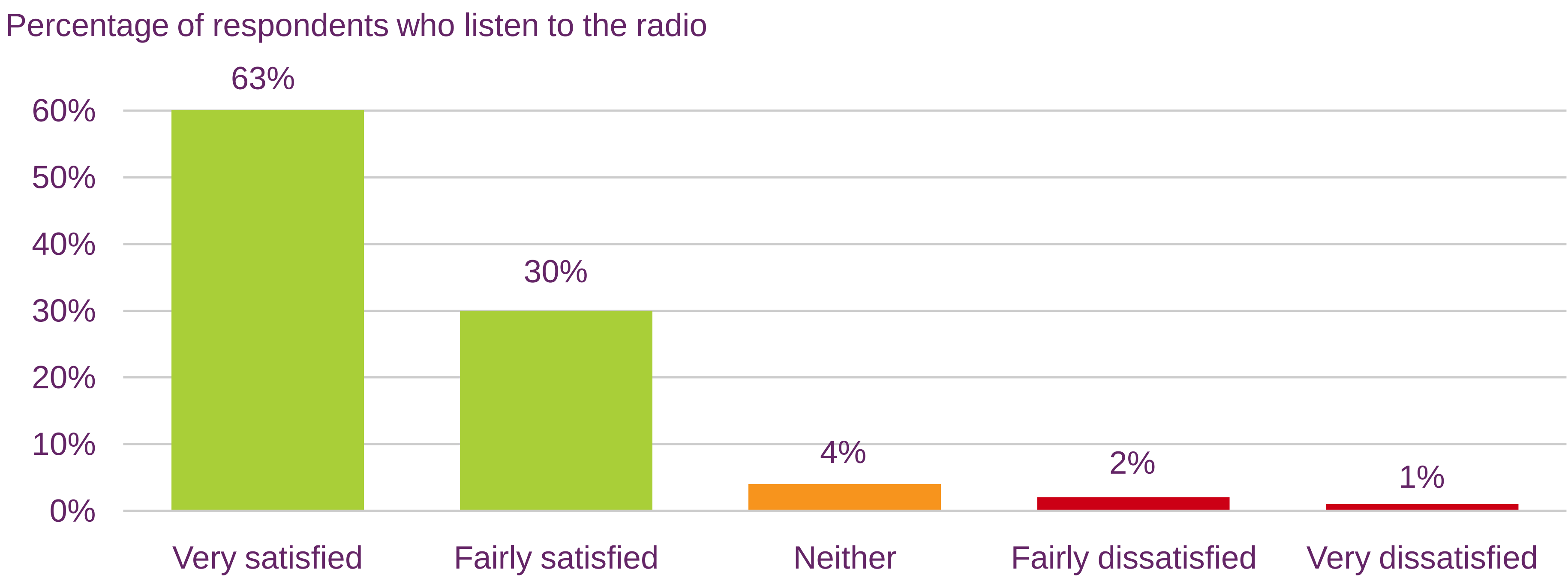
Source: Ofcom, community station revenues 2008/09

Community radio licence awards in 2009/10

Community station	Location	Award date
Betar Bangla	Stratford, east London	June 2010
Generation Radio	Clapham Park, south London	June 2010
Greenwich Kasapah	Greenwich, south east London	June 2010
Reprezent FM	South London	June 2010
Rinse FM	Inner London	June 2010
Streetlife Radio	Waltham Forest, north east London	June 2010
Susy Radio	Redhill and Reigate, Surrey	June 2010
SAFE Radio	Grays, Essex	March 2010
SFM	Sittingbourne, Kent	February 2010
Gateway FM	Basildon, Essex	February 2010
Insanity	Egham, Surrey	February 2010
Kane FM	Guildford, Surrey	February 2010
The Vibe	Watford	February 2010
Ox FM	Oxford	December 2009
Ummah FM	Reading	October 2009
Marlow FM	Marlow, Bucks	September 2009
Bradio BGWS	Farnborough, Aldershot, Camberley and Fleet	September 2009
Seahaven FM	Newhaven, Seaford and Peacehaven, East Sussex	September 2009
The Park	Brockenhurst, Hampshire	September 2009
Voice FM	Southampton	September 2009

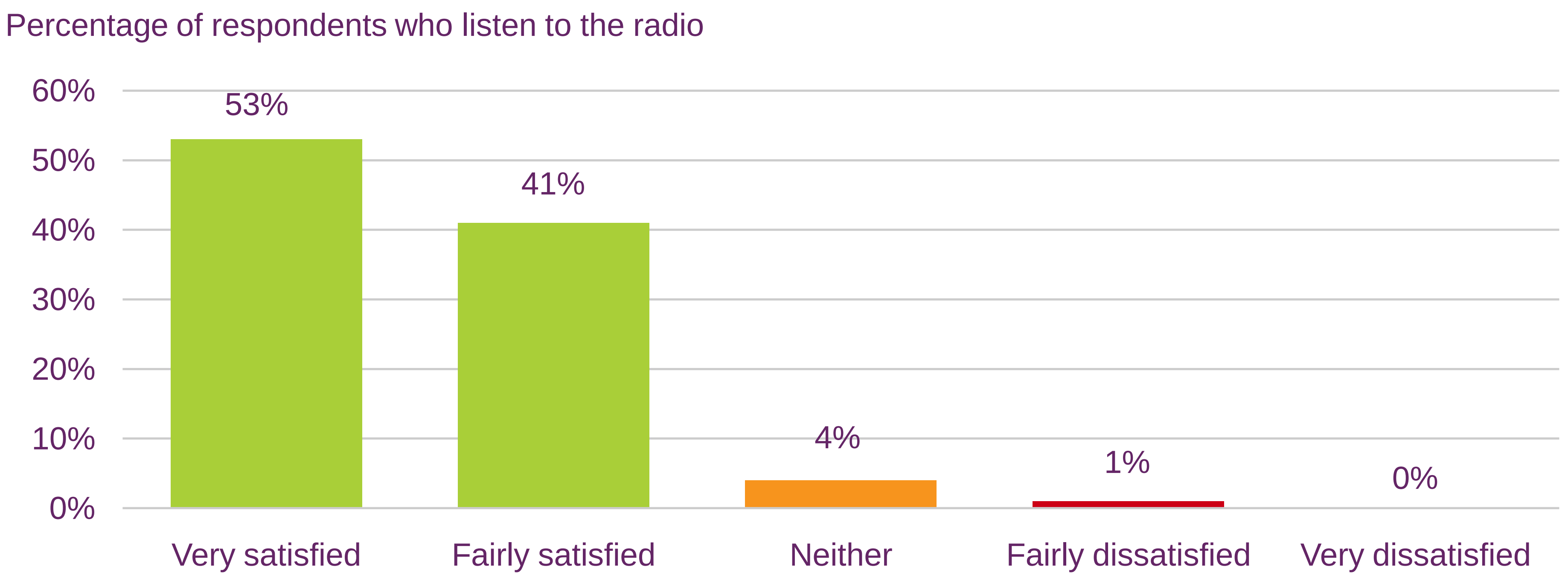
Source: Ofcom, June 2010

Satisfaction with choice of radio stations in area



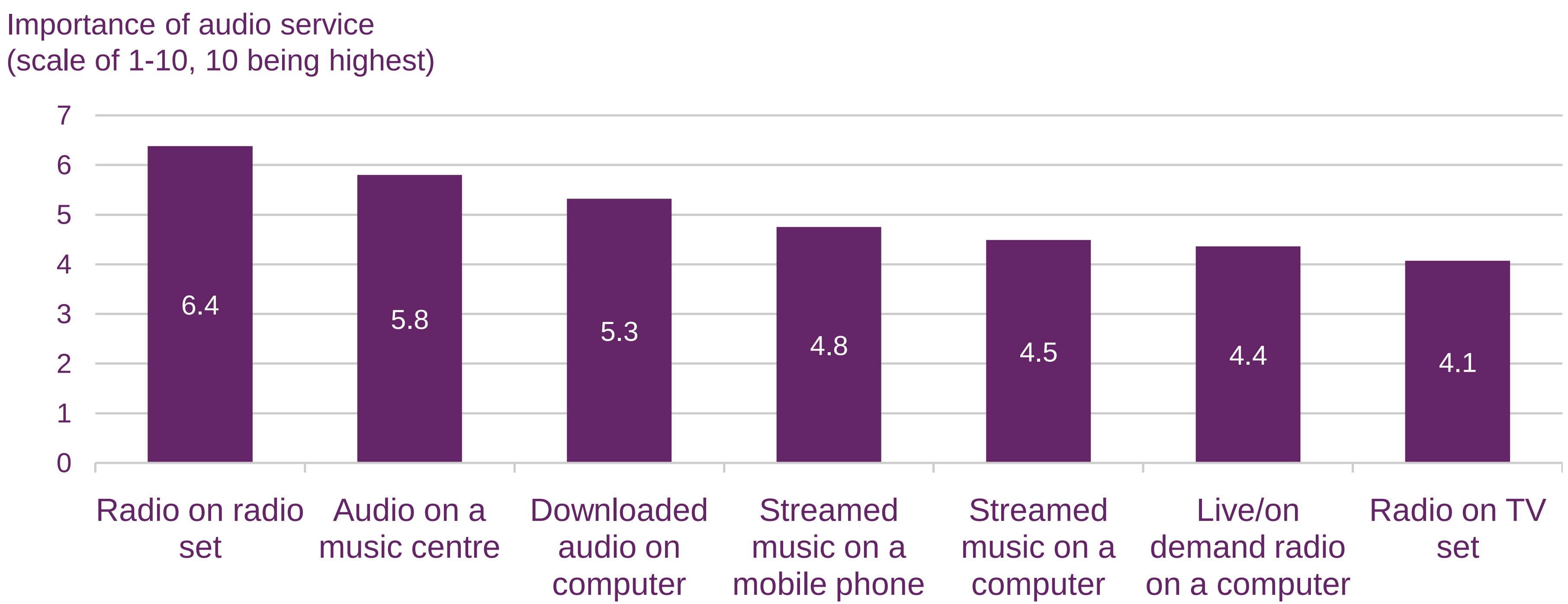
Source: Ofcom research, Q1 2010
Base: All who listen to the radio (n=2483)
Q: How satisfied are you with the choice of radio stations available in your area?

Satisfaction with radio content



Source: Ofcom research, Q1 2010
Base: All who listen to the radio (n=2483)
Q: How satisfied are you with the choice of radio stations available in your area?

Importance of audio / radio activities to user



Source: Ofcom research June 2010
Additional questionnaire Q2f: "How important are each of these activities to you? Please use a scale from 1 to 10, where 1 means not at all important to you and 10 means very important to you."
Base: all who ever do each activity: Radio on TV (530); radio on radio set (1013); radio on computer (354); streamed music on a computer (219); downloaded audio on computer (466); downloaded audio on mobile phone (206); audio on a music centre (907)

Telecoms and networks: data release

August 2010

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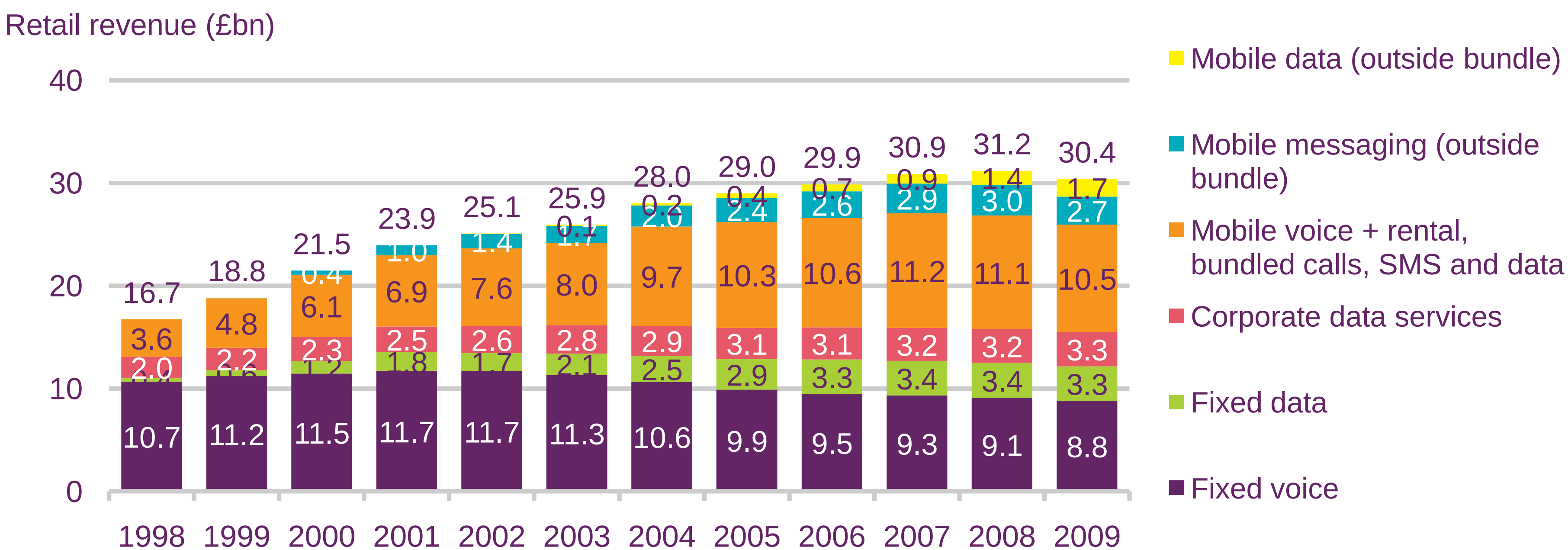
Email:	market.intelligence@ofcom.org.uk

Operator-reported UK telecoms industry retail revenue

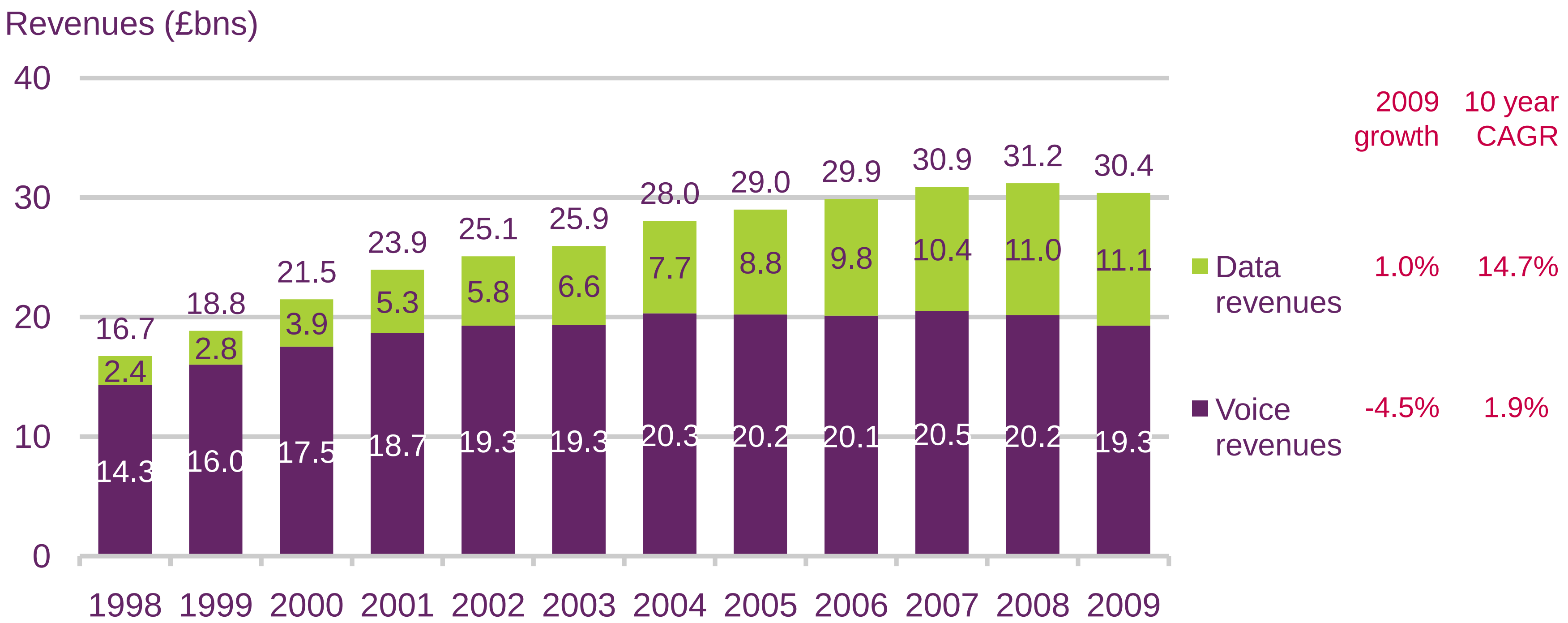


Source: Ofcom / operators / IDC

Note: The bundling of messaging and data services in with monthly rental tariffs mean that there will be an element of mobile data revenue included in mobile voice revenues

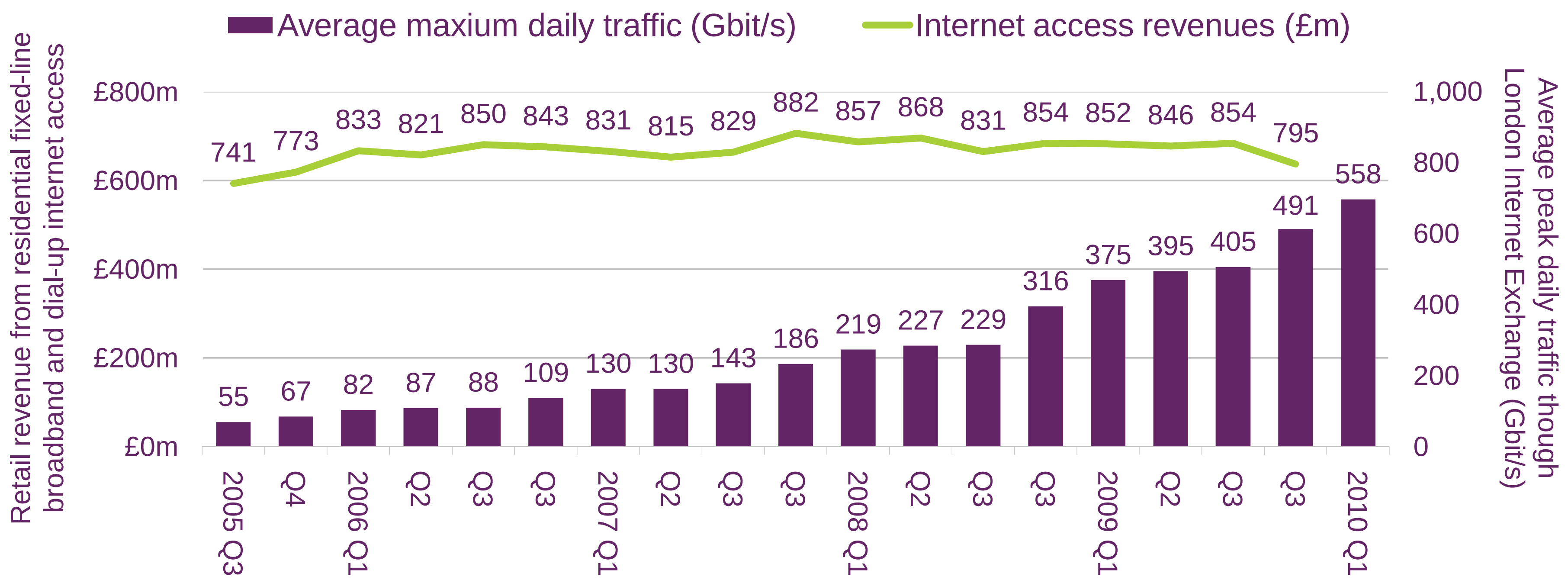
Figure 5.4

Voice and data operator-reported UK telecoms industry retail revenue



Source: Ofcom / operators

Internet access revenues and average peak daily data traffic flowing across London Internet Exchange (LINX) switches



Source: Revenue data – Ofcom based on operator returns; Data traffic – LINX, https://www.linx.net/pubtools/trafficstats.html
Note: LINX traffic data represents the average of the five-minute daily peaks of aggregate traffic across each of the LINX members' ports; LINX data excludes private peering; revenue data is fixed-line internet access only and is not available for Q1 2010.

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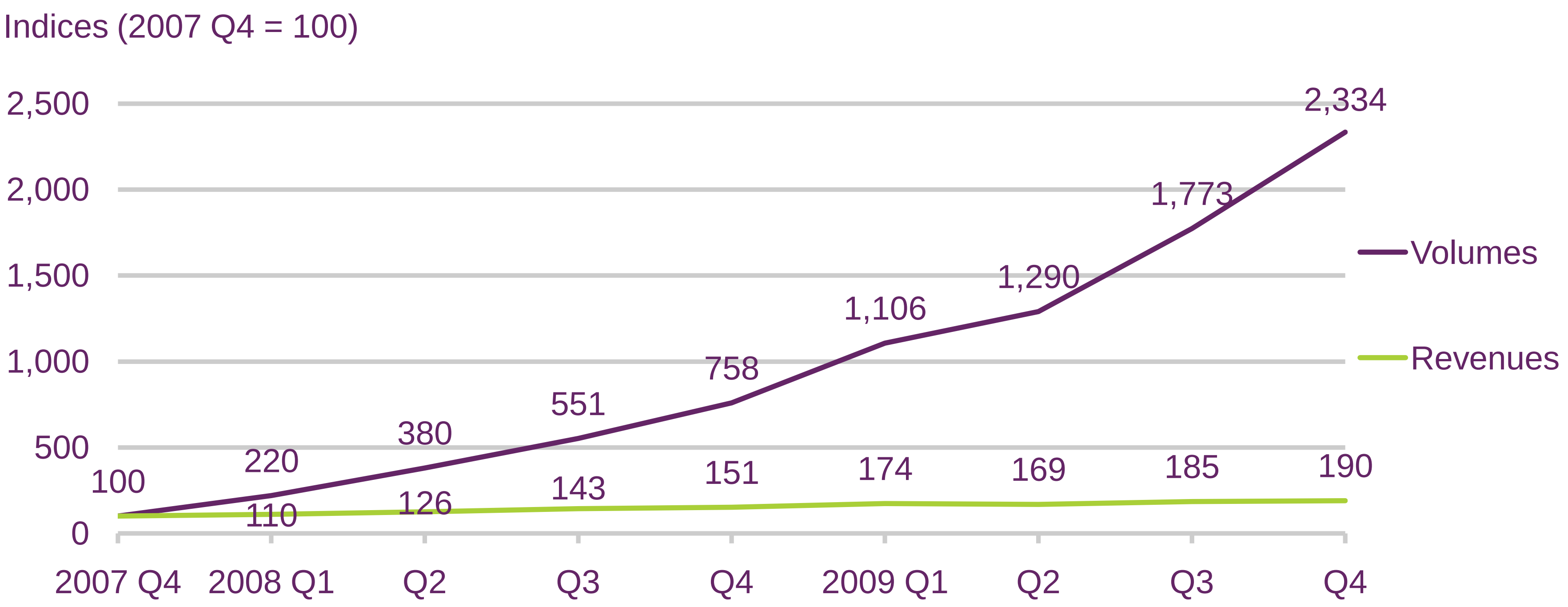
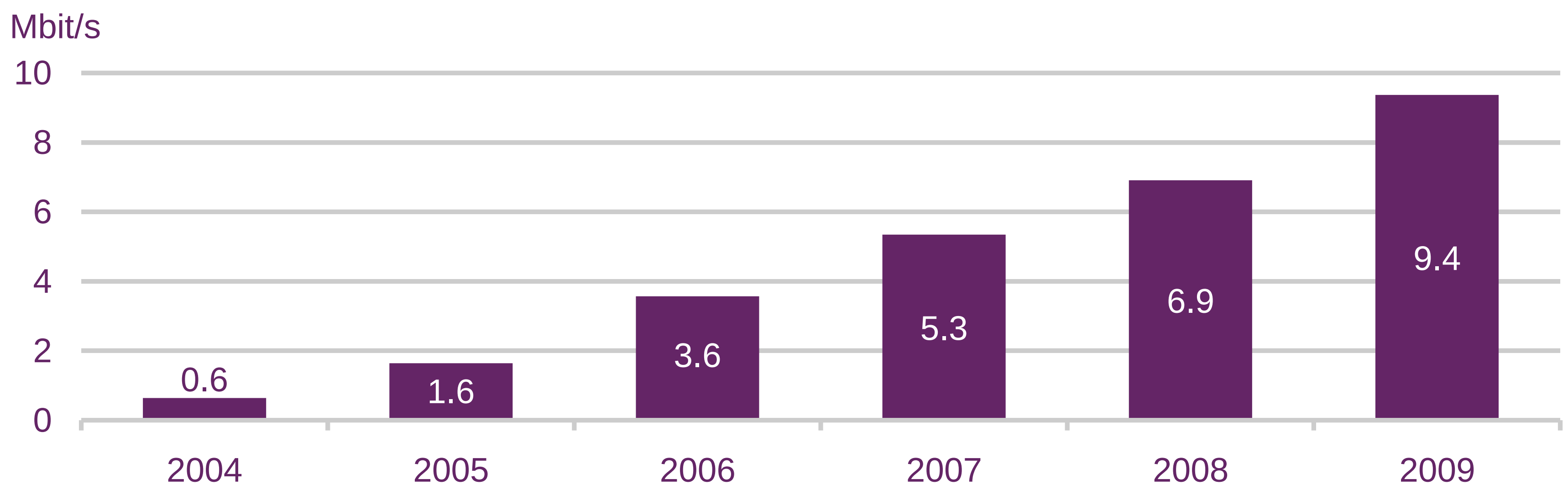
Mobile data volumes and revenues



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; data revenue is likely to be understated as it excludes any data element included within standard pay-monthly tariffs.

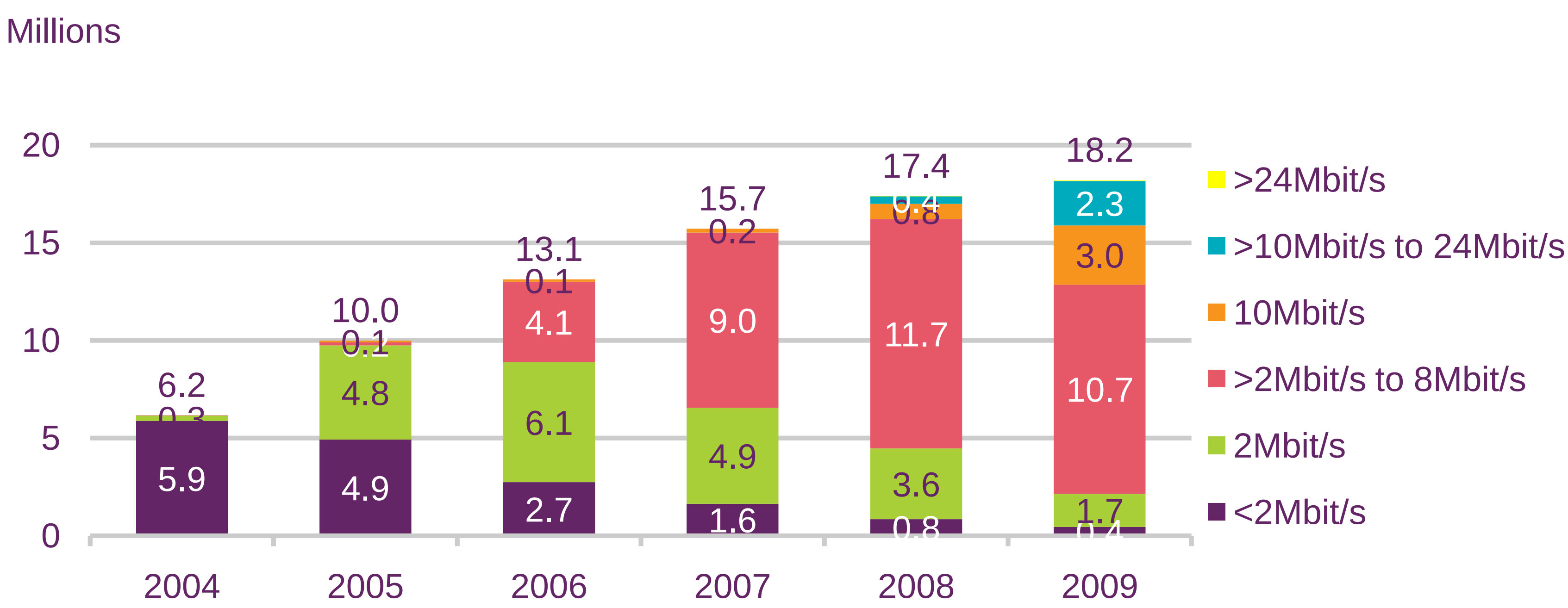
Average non-corporate fixed broadband connection headline speeds



	2004	2005	2006	2007	2008	2009
Annual growth	14%	156%	117%	50%	29%	36%
	0.1 Mbit/s	1.0 Mbit/s	1.9 Mbit/s	1.8 Mbit/s	1.6 Mbit/s	2.5 Mbit/s

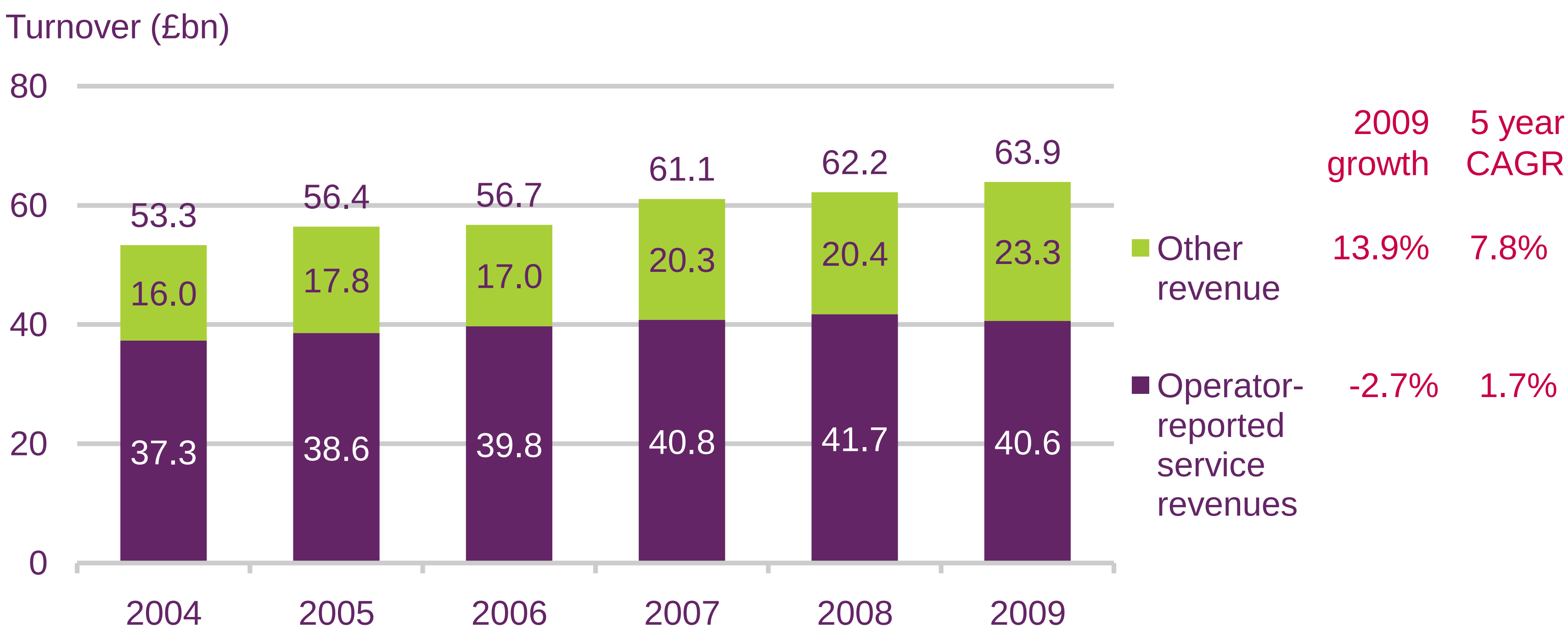
Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes mobile broadband connections

Non-corporate broadband connections by headline speed



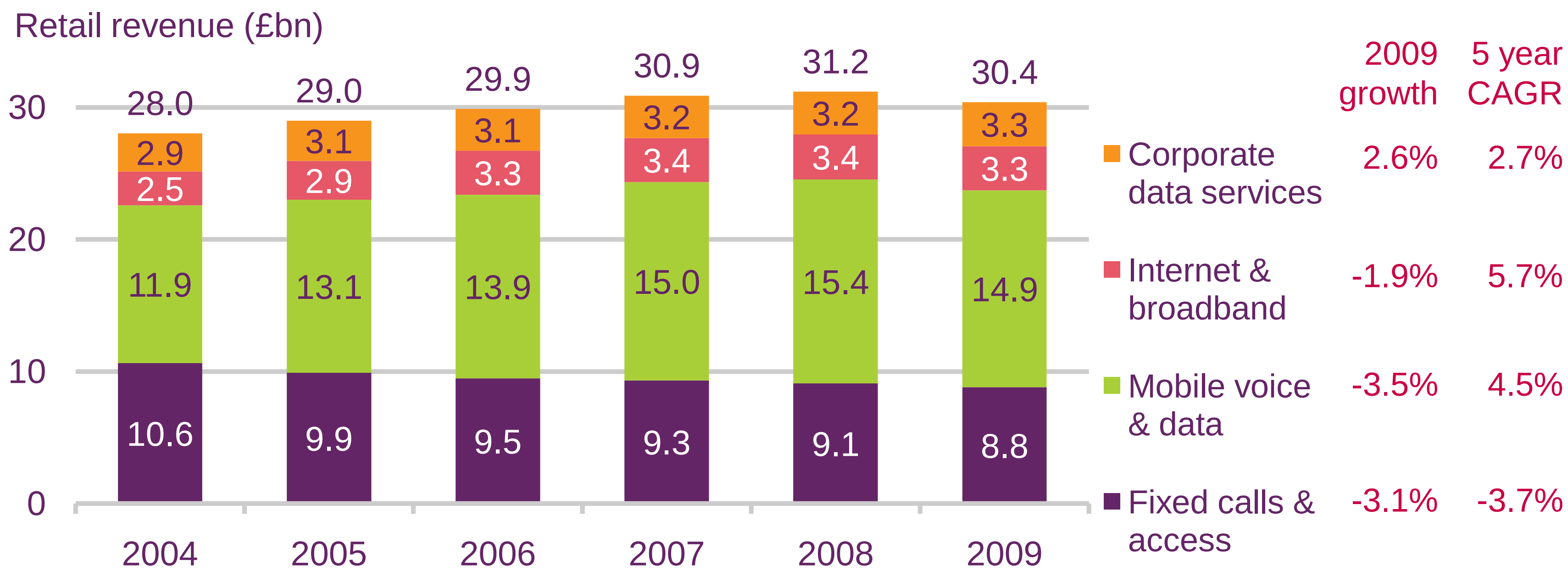
Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes mobile broadband connections

UK telecoms industry revenue overview



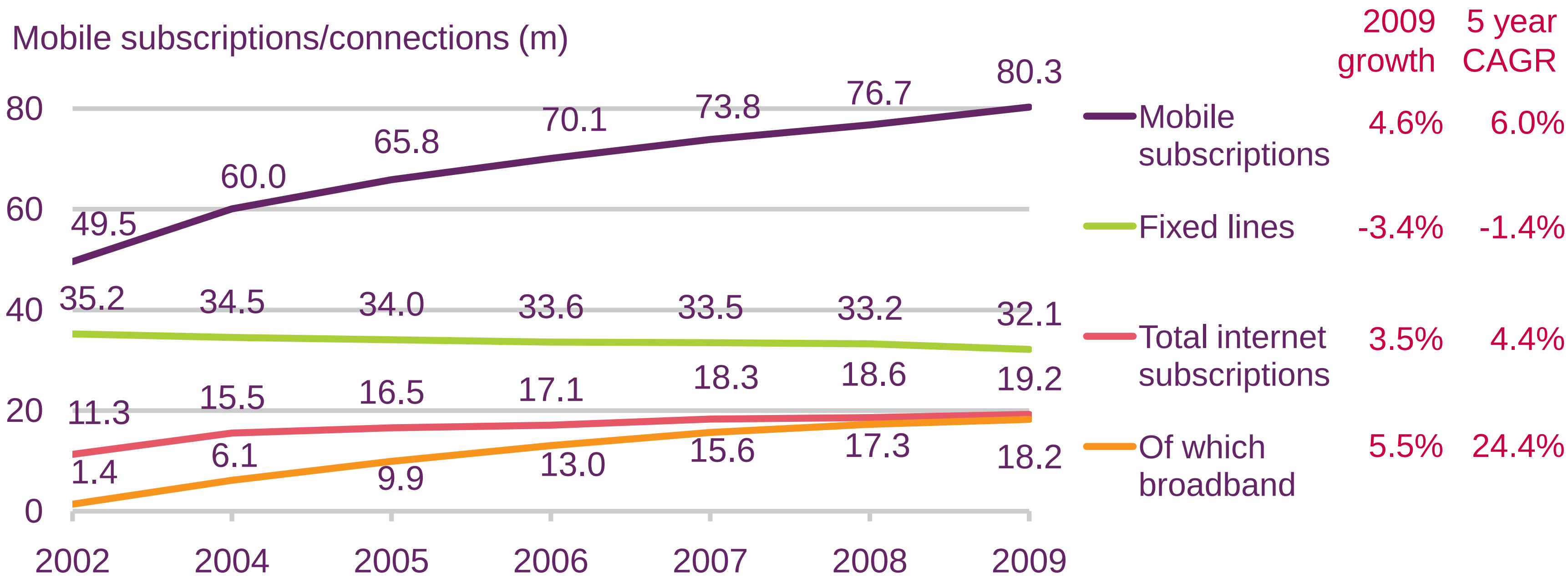
Source: Ofcom / ONS / operators
Note: Includes estimates where Ofcom does not receive data from operators

UK telecoms industry retail revenue



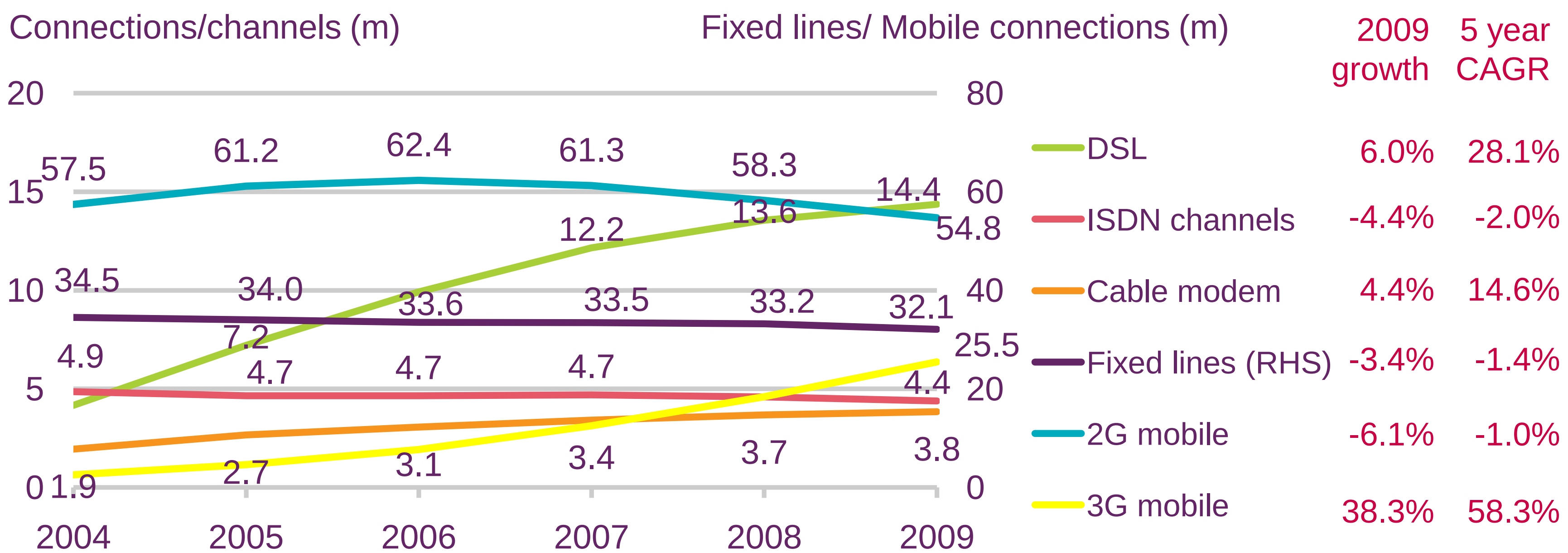
Source: Ofcom / operators / IDC

Total telecoms connections



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; broadband excludes corporate connections

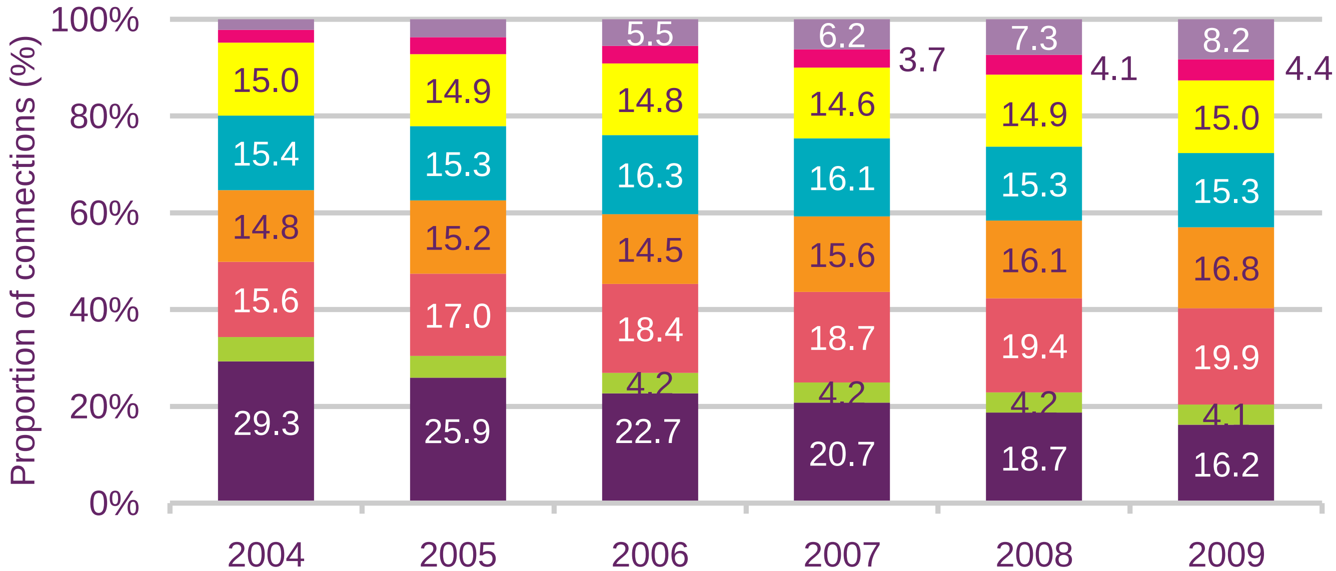
Fixed and mobile telecoms connections



Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators; broadband excludes corporate connections

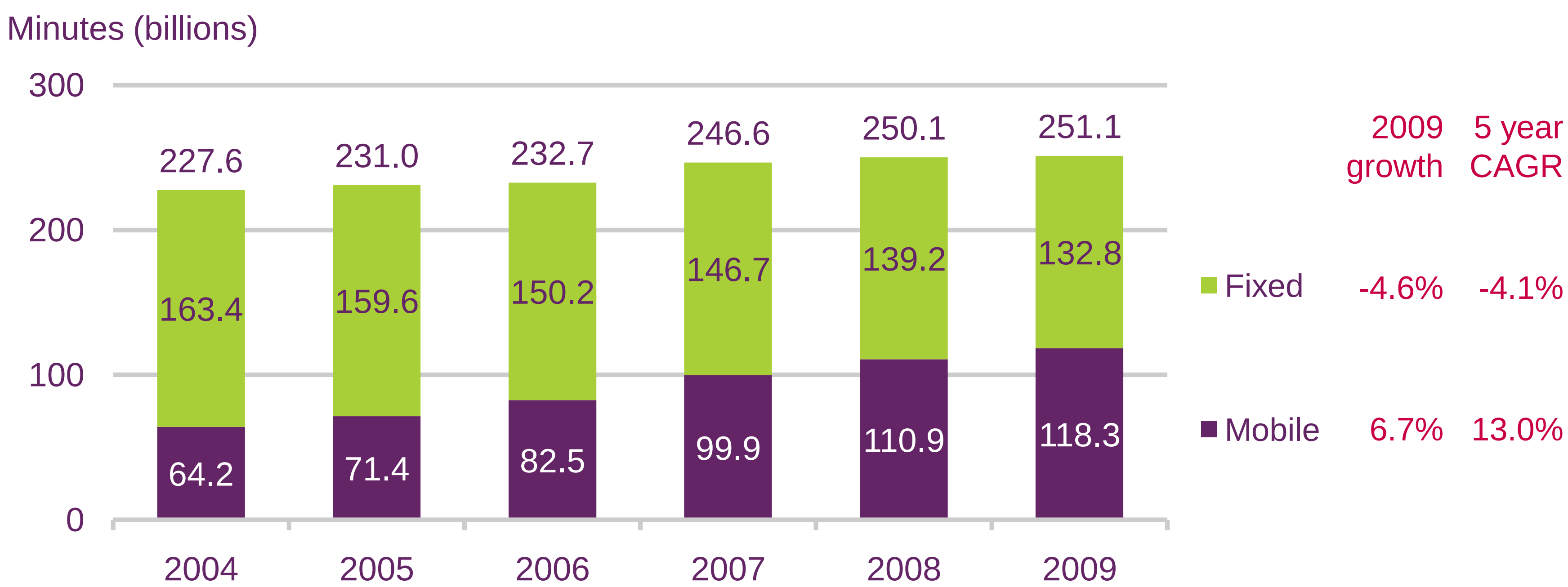
Share of total UK fixed and mobile telecoms connections



	%age point change	
	One year	Five years
Other	0.9	6.0
3UK	0.3	1.8
Orange	0.1	0.0
T-Mobile	0.0	-0.1
Vodafone	0.7	1.9
O2	0.5	4.4
Virgin Media	-0.1	-0.9
BT	-2.5	-13.1

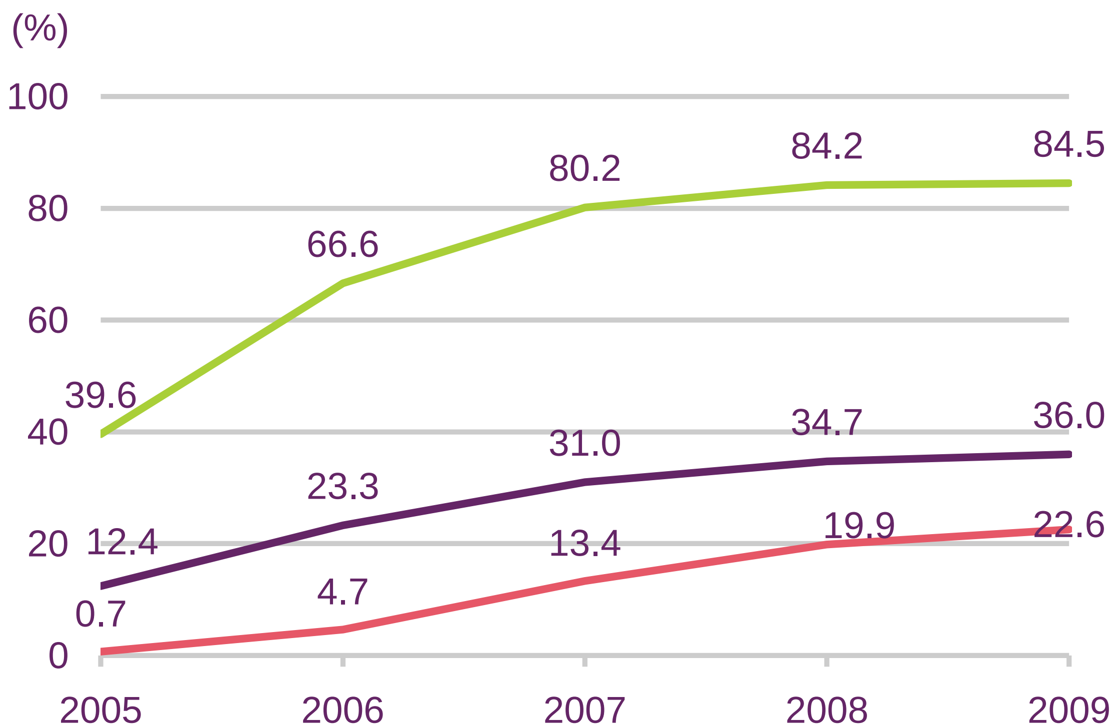
Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; ‘Other’ includes carrier pre-selection and wholesale line rental in additional to fixed other licensed operators. MVNOs and mobile service provider connections are included within the network operator figures

Mobile voice call volumes



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators

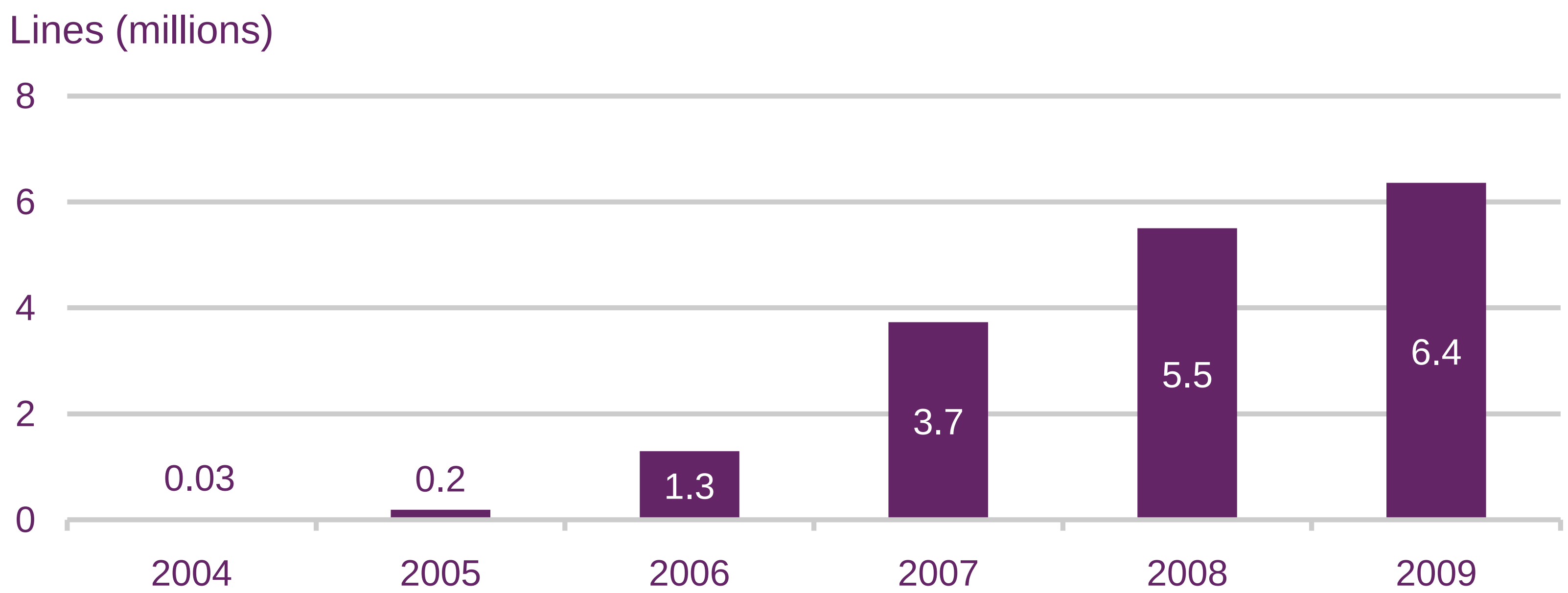
Proportion of unbundled exchanges and connected premises



	%age point change	
	One year	Three years
Proportion of premises connected to unbundled BT exchange	0.4	8.3
Proportion of BT exchanges that have been unbundled	3.6	15.6
Proportion of total lines that have been unbundled	13.4	69.0

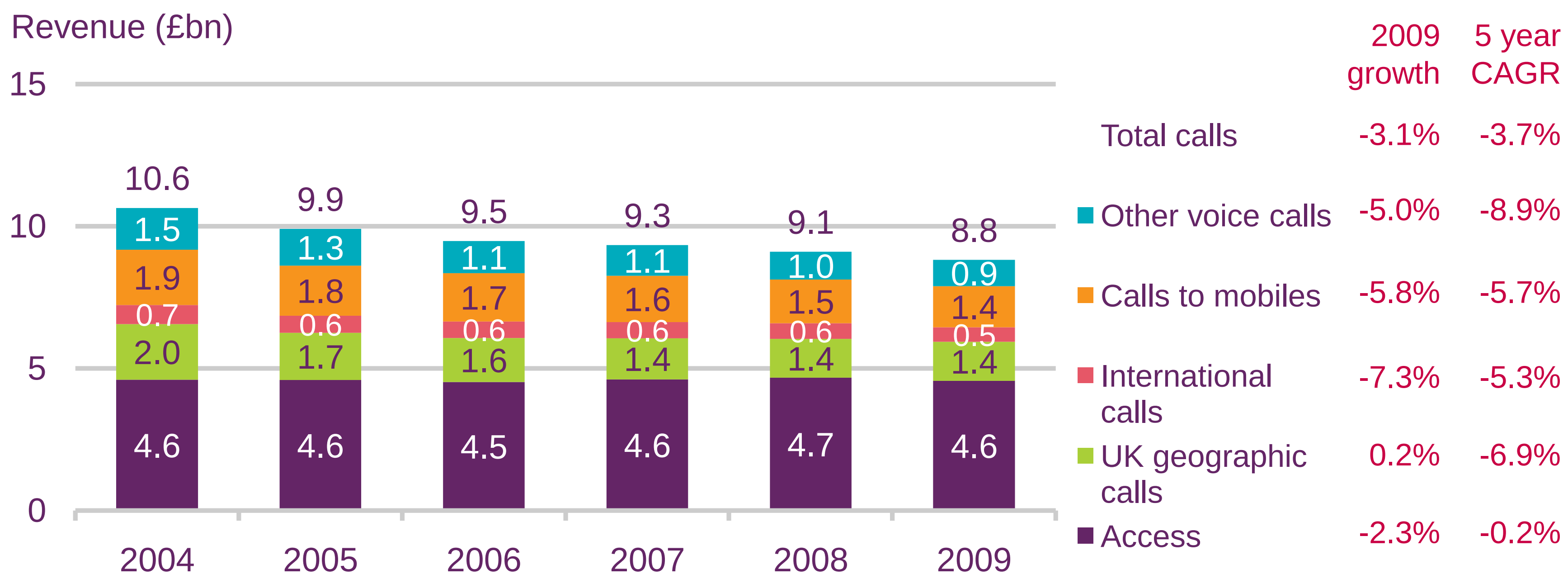
Source: Ofcom / operators

Fully and partially unbundled lines



Source: Ofcom / operators

Fixed voice telecoms revenue

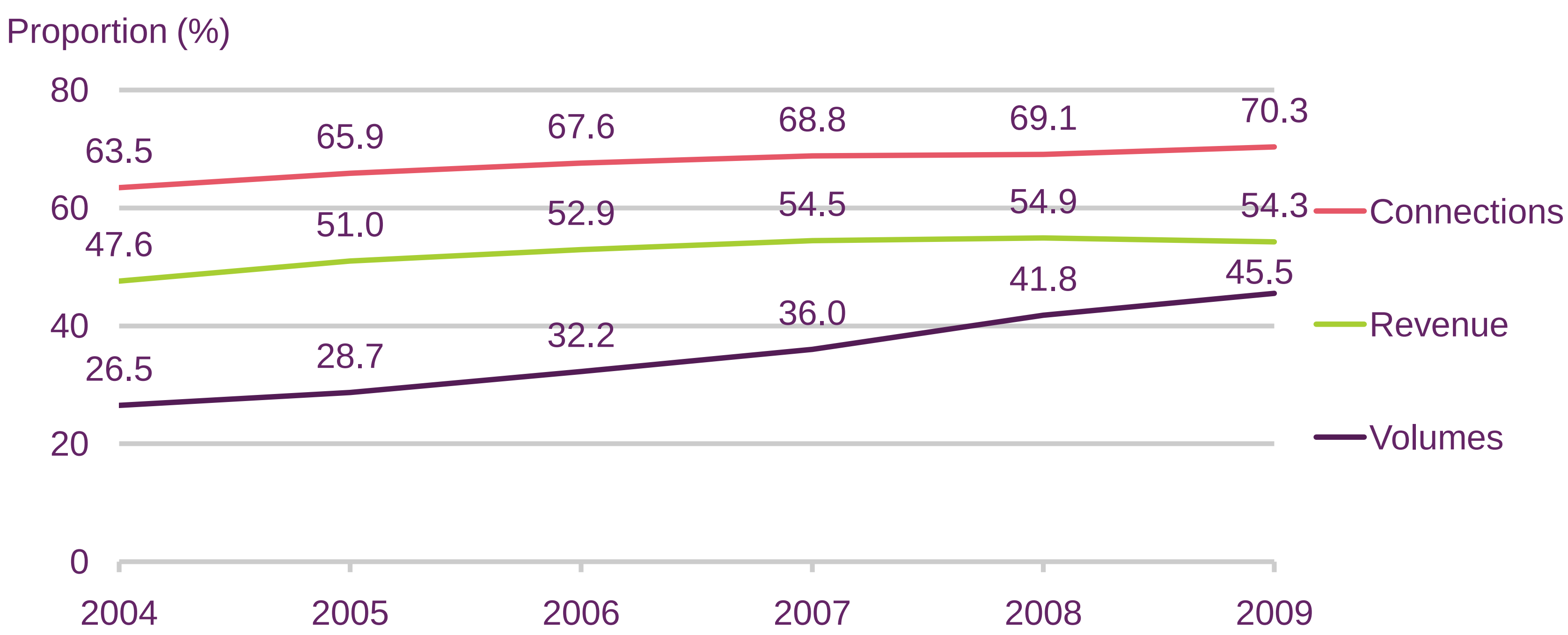


Source: Ofcom / operators

Average monthly voice revenue per fixed line

Source: Ofcom / operators
Note: Includes spend on non-geographic voice calls

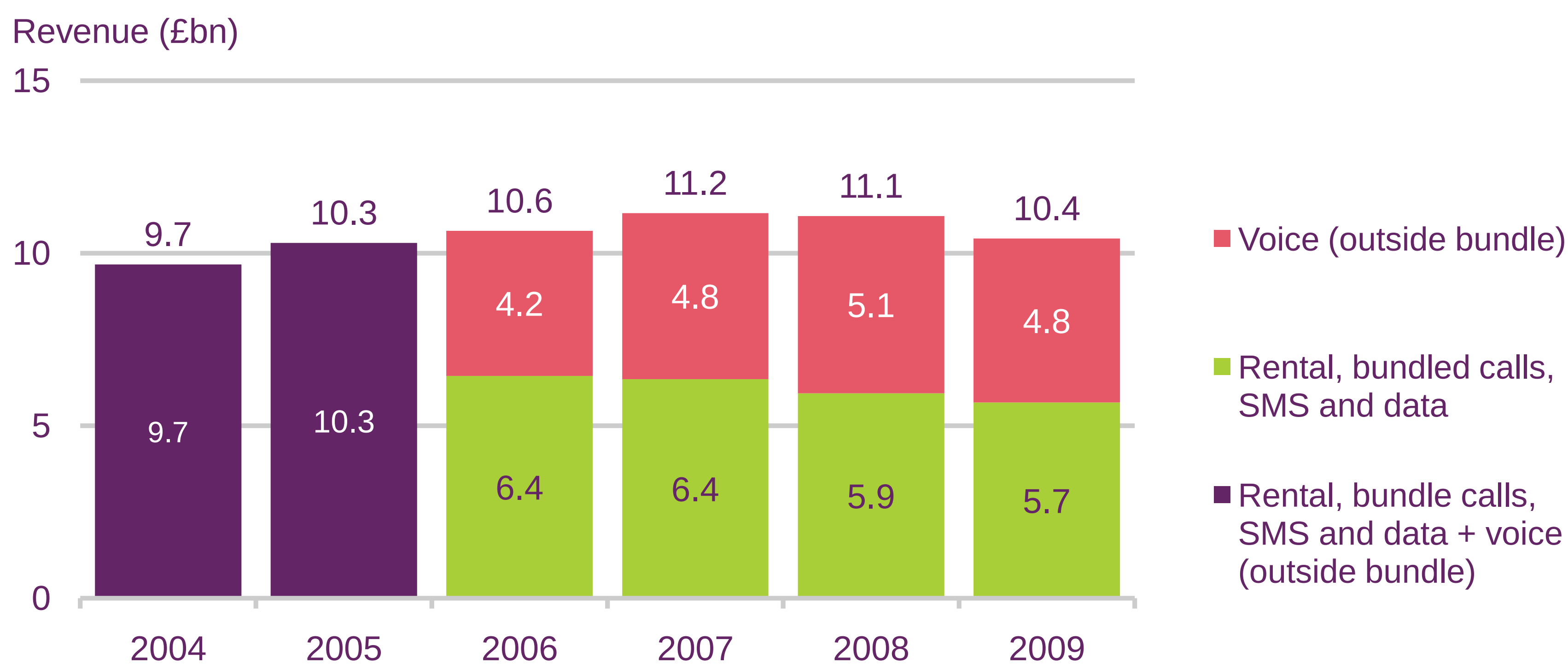
Mobile share of total voice connections, revenues and volumes



Source: Ofcom / operators

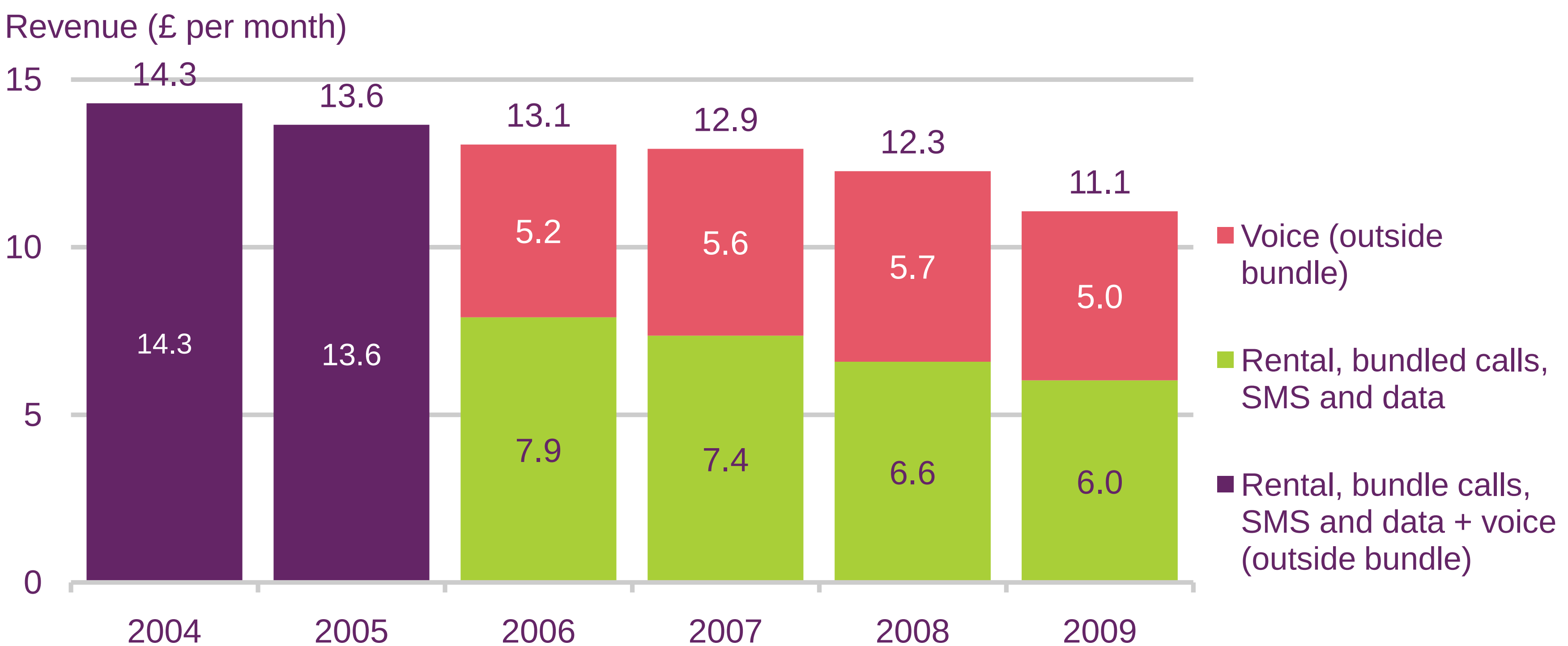
Note: Includes estimates where Ofcom does not receive data from operators. Mobile figures do not include dongles/PC datacard connections

Estimated mobile telecom retail revenue from bundles and voice services



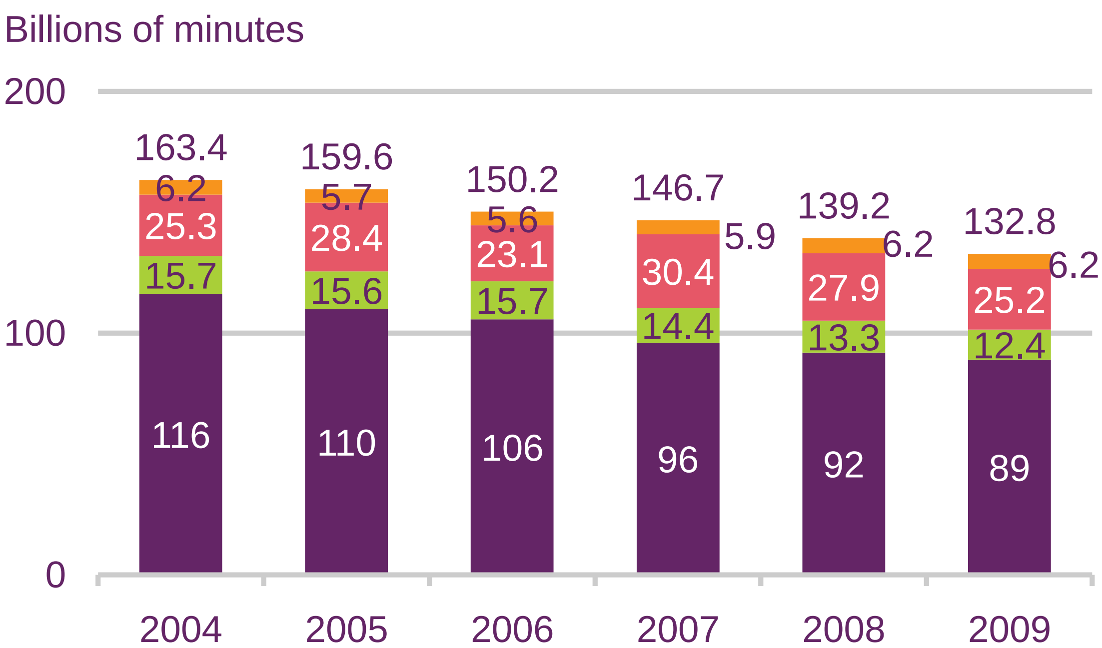
Source: Ofcom/Operators
Note: The split between revenue from rental, bundled calls and SMS AND voice revenue (outside bundle) is only available from 2006 onwards.

Average monthly retail revenue per mobile subscription 2004 - 2009



Source: Ofcom/Operators
Note: The split between revenue from rental, bundled calls and SMS AND voice revenue (outside bundle) is only available from 2006 onwards.

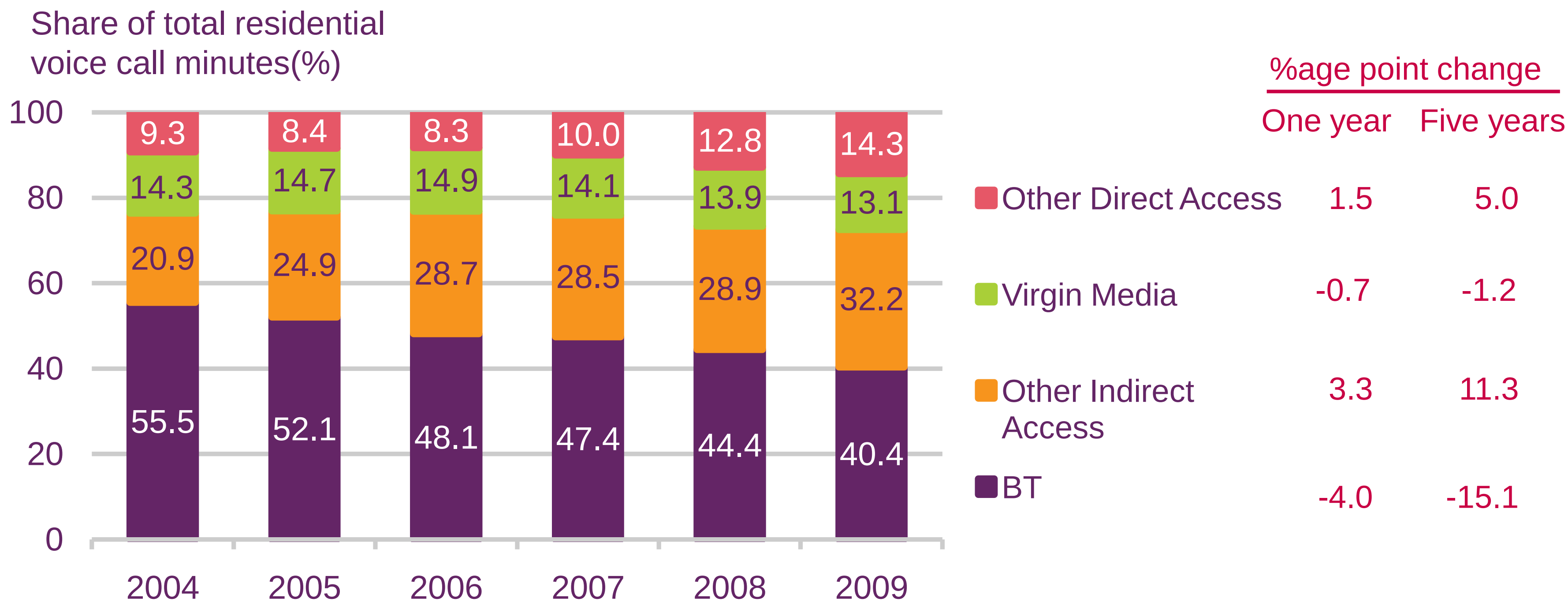
Fixed telecom call volumes



	2009 growth	5 year CAGR
International calls	0.3%	0.1%
Other calls	-9.7%	-0.1%
Calls to mobiles	-6.3%	-4.5%
UK geographic calls	-3.2%	-5.2%

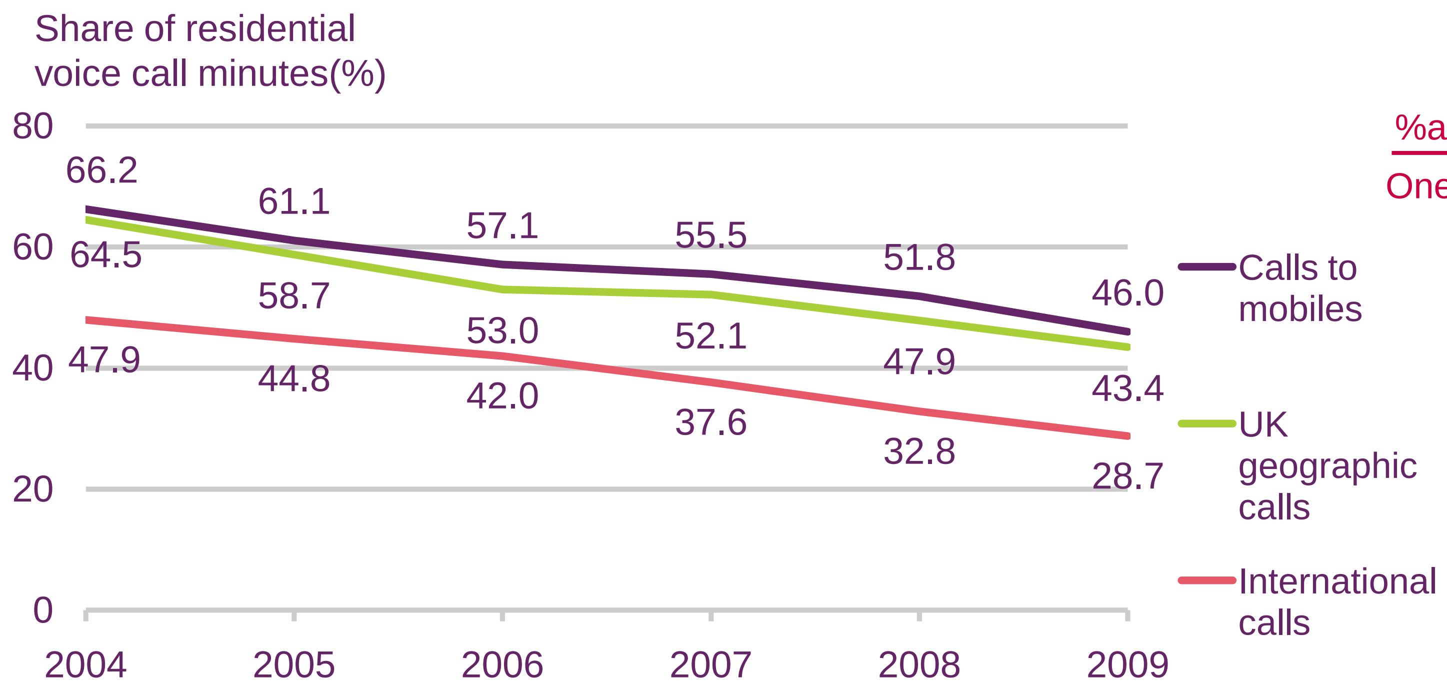
Source: Ofcom / operators

Share of retail residential voice call volumes



Source: Ofcom / operators
Excludes NTS calls

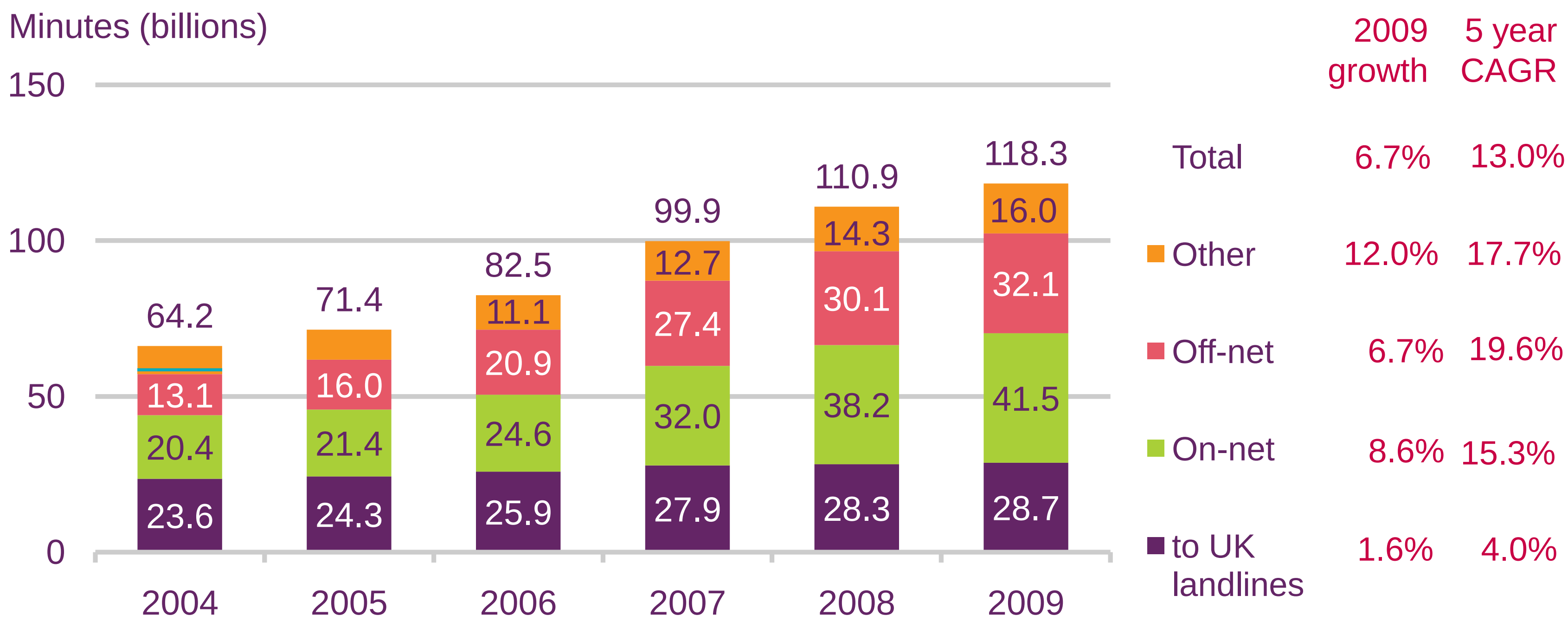
BT share of retail residential voice call volumes by type



%age point change	One year	Five years
Calls to mobiles	-5.9	-20.3
UK geographic calls	-4.4	-21.1
International calls	-4.1	-19.2

Source: Ofcom / operators

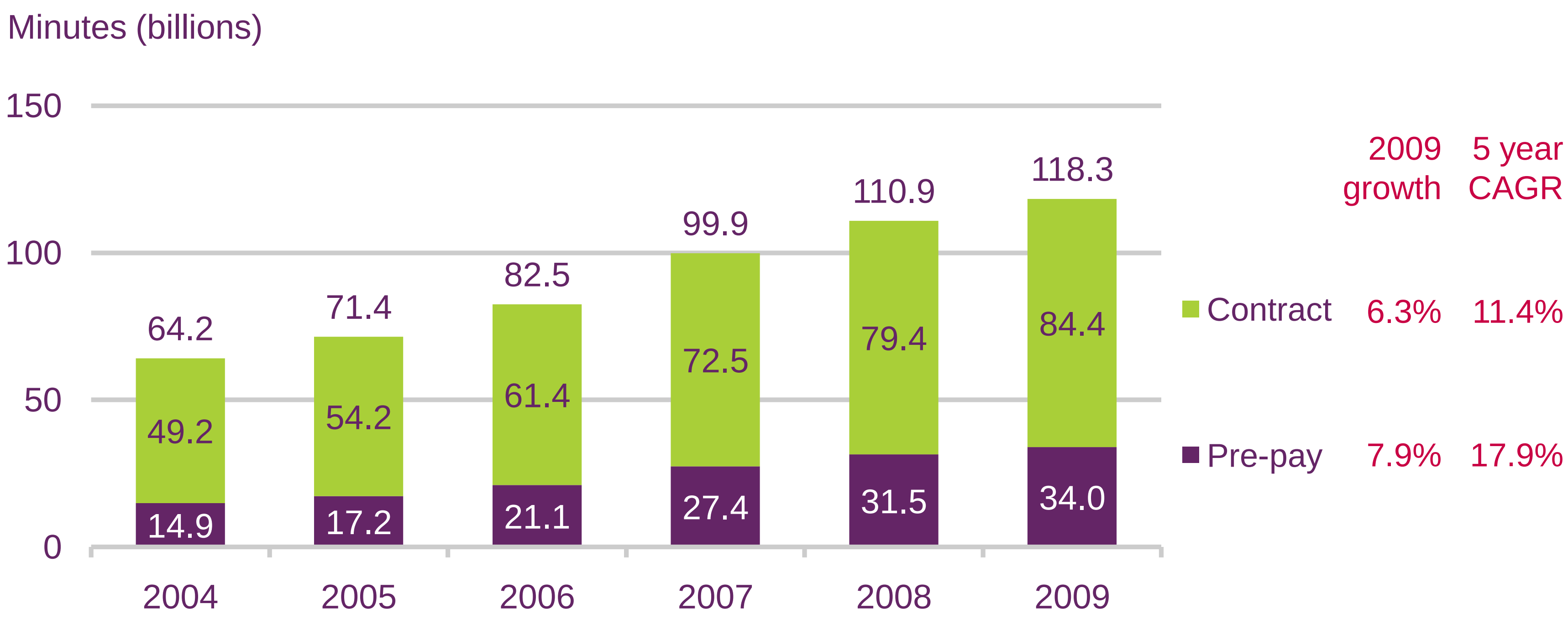
Mobile telecom call volumes



Source: Ofcom / operators

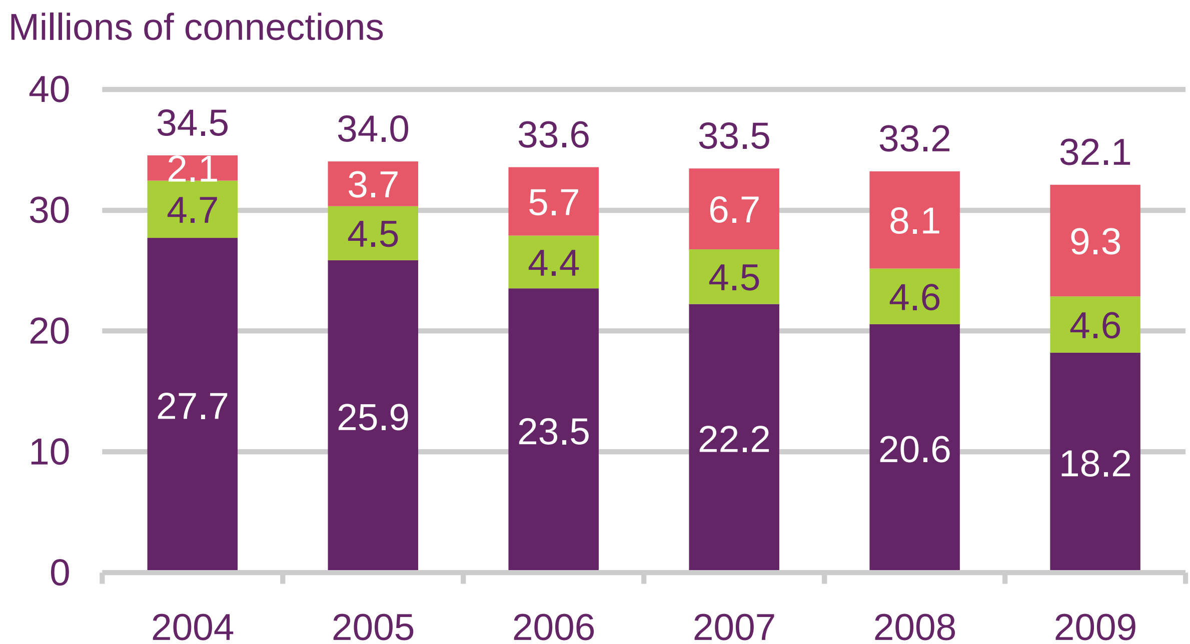
Note: Includes estimates where Ofcom does not receive data from operators

Mobile voice call volumes, by subscription type



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators

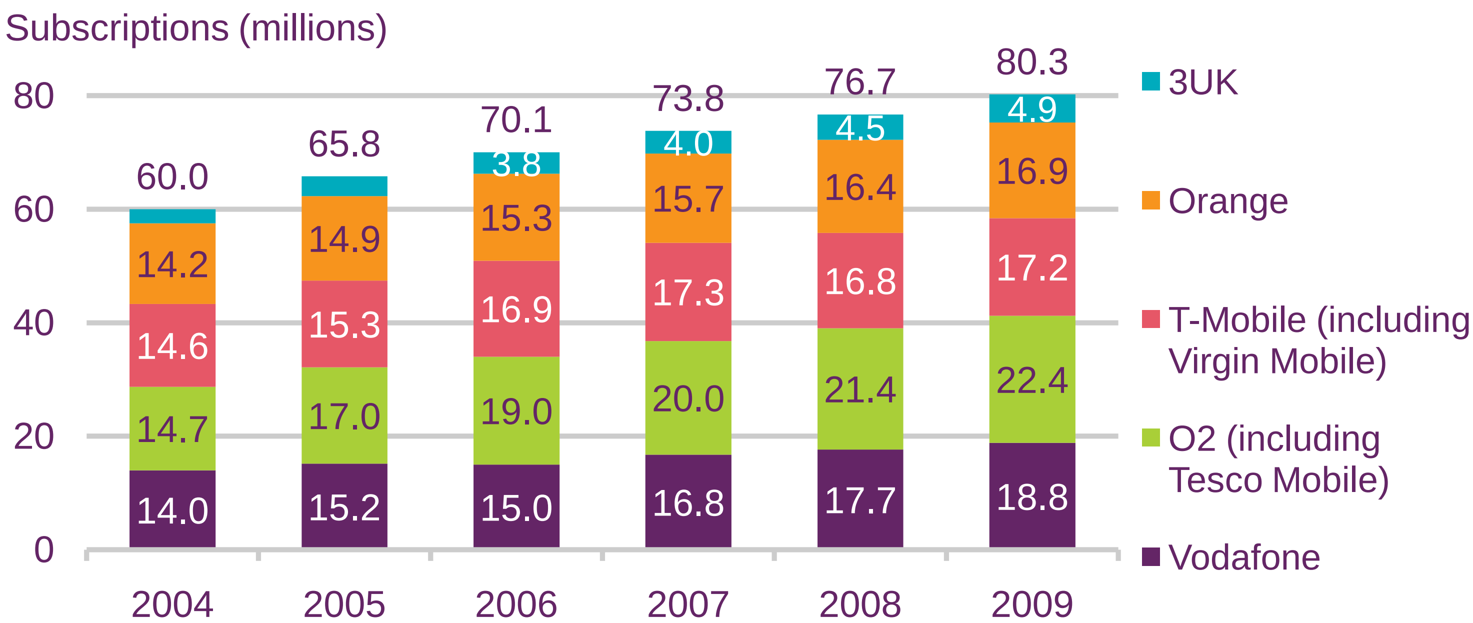
Fixed-line connections by operator



	2009 growth	5 year CAGR
Other	14.8%	34.7%
Virgin Media	0.7%	-0.4%
BT	-11.4%	-8.0%

Source: Ofcom / operators

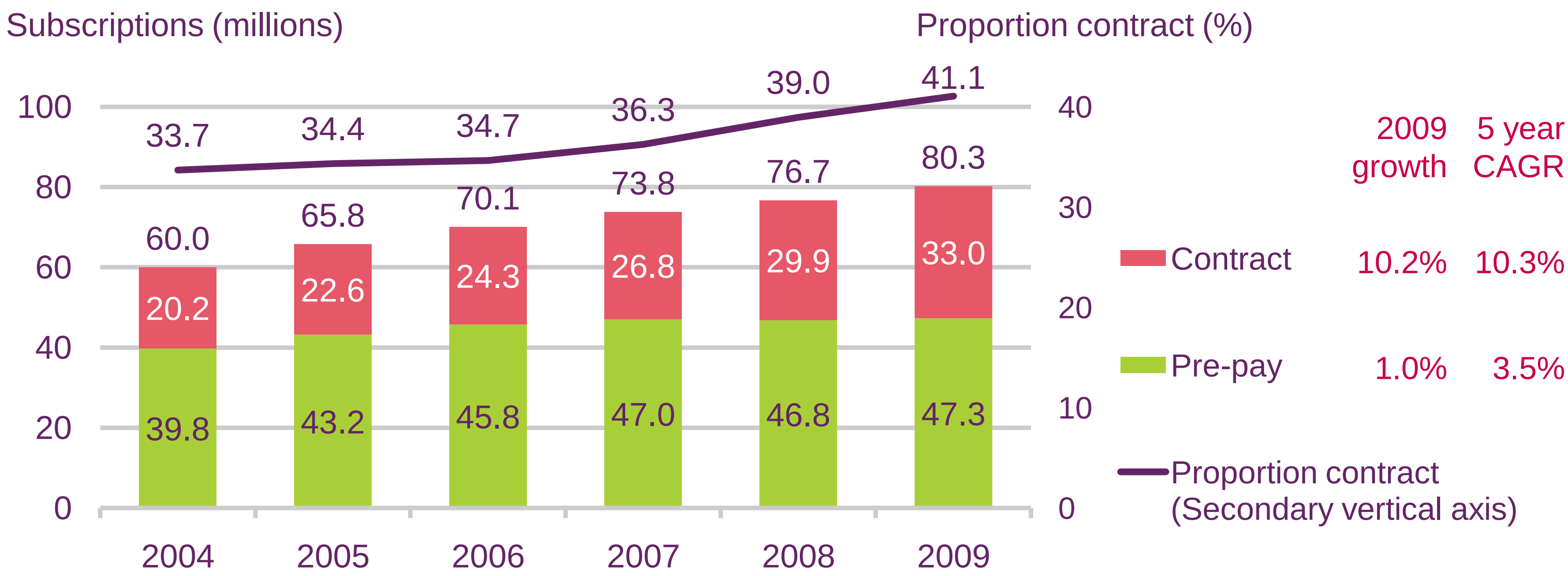
Mobile subscriptions, by operator



	2009 growth	5 year CAGR
3UK	9.9%	14.6%
Orange	3.0%	3.5%
T-Mobile (including Virgin Mobile)	2.3%	3.3%
O2 (including Tesco Mobile)	4.8%	8.8%
Vodafone	6.6%	6.1%

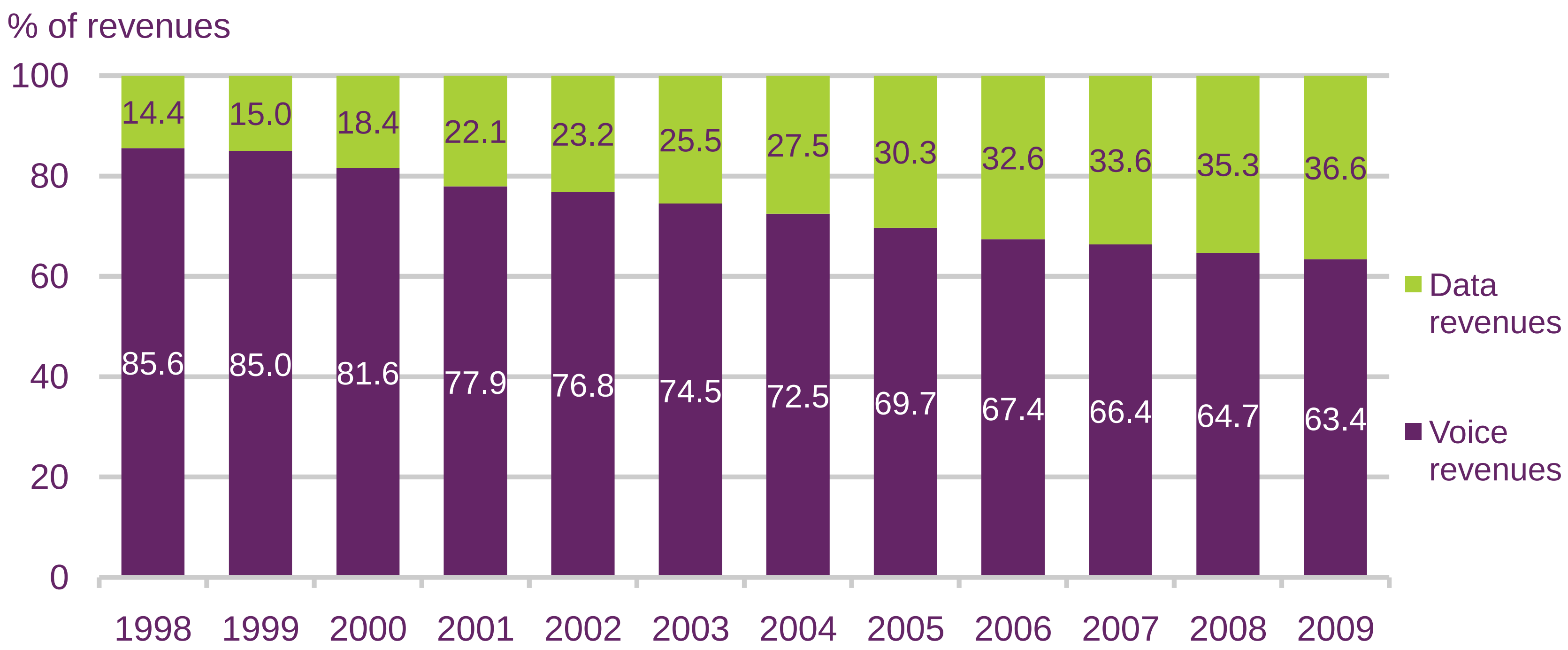
Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators

Pre-pay and contract mobile subscriptions



Source: Ofcom / operators
Notes: Based on network operator reported figures; includes estimates where Ofcom does not receive data from the operators

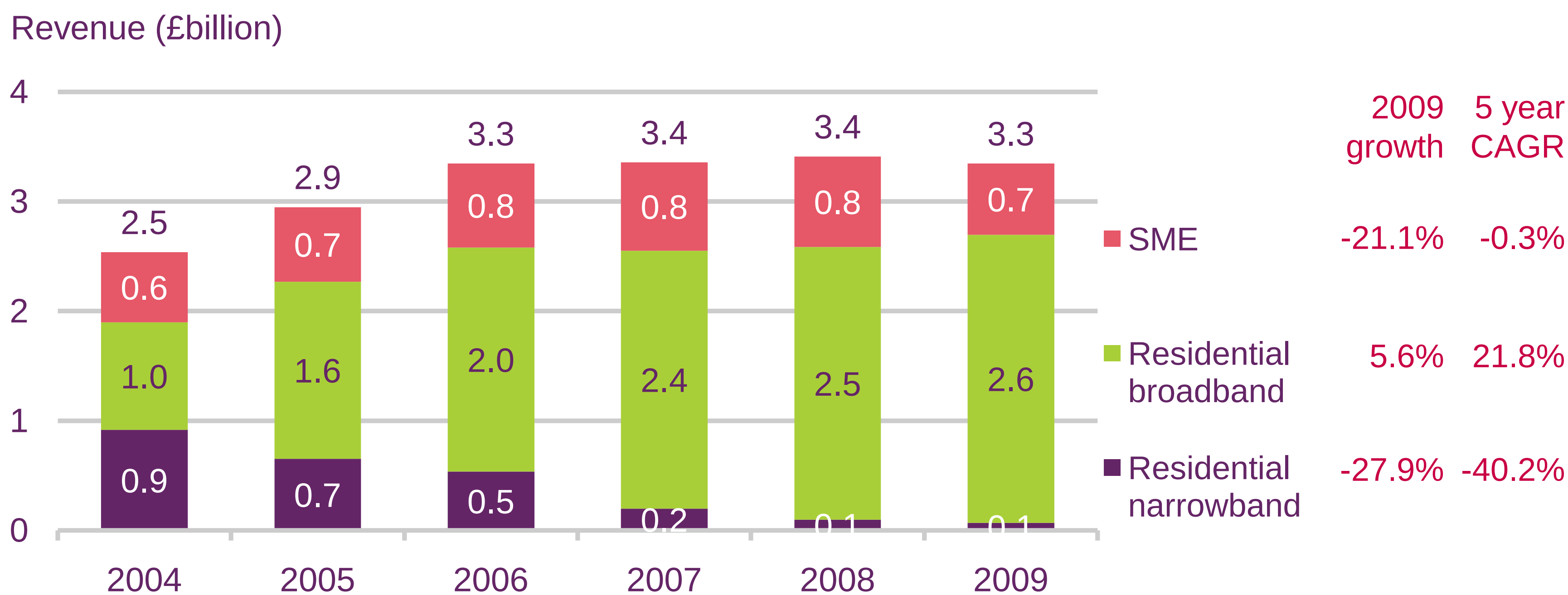
Voice and data operator-reported UK telecoms industry retail revenue



Source: Ofcom / operators

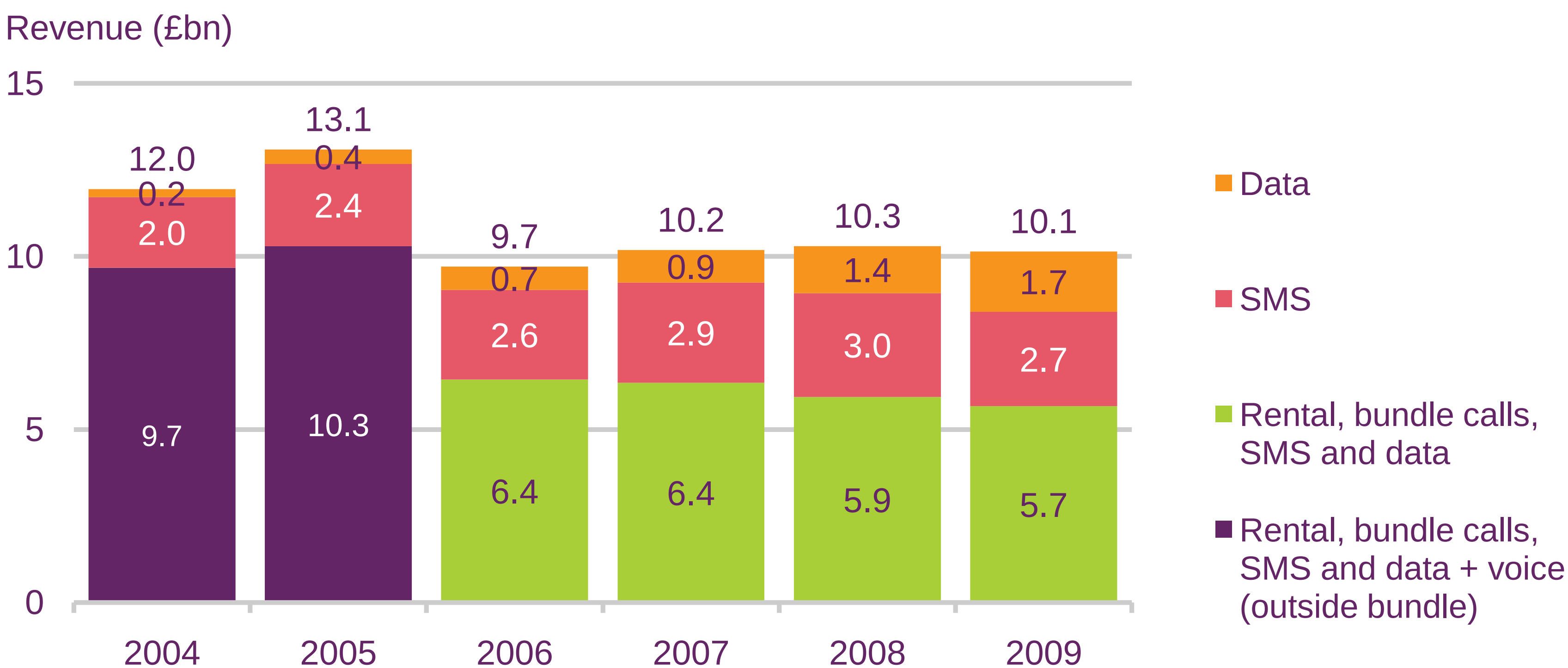
The bundling of messaging and data services in with monthly rental tariffs means voice revenue will include an element of mobile data revenue

Estimated UK internet and broadband retail revenue



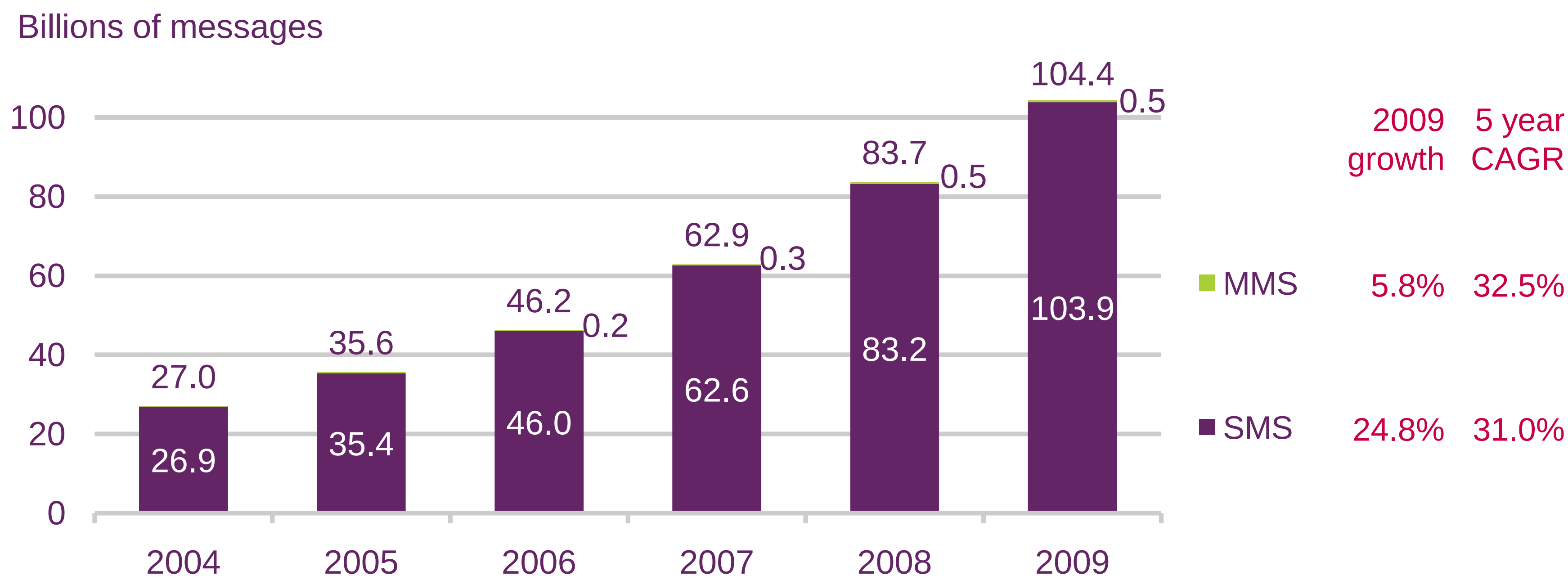
Source: Ofcom / operators

Mobile data revenues



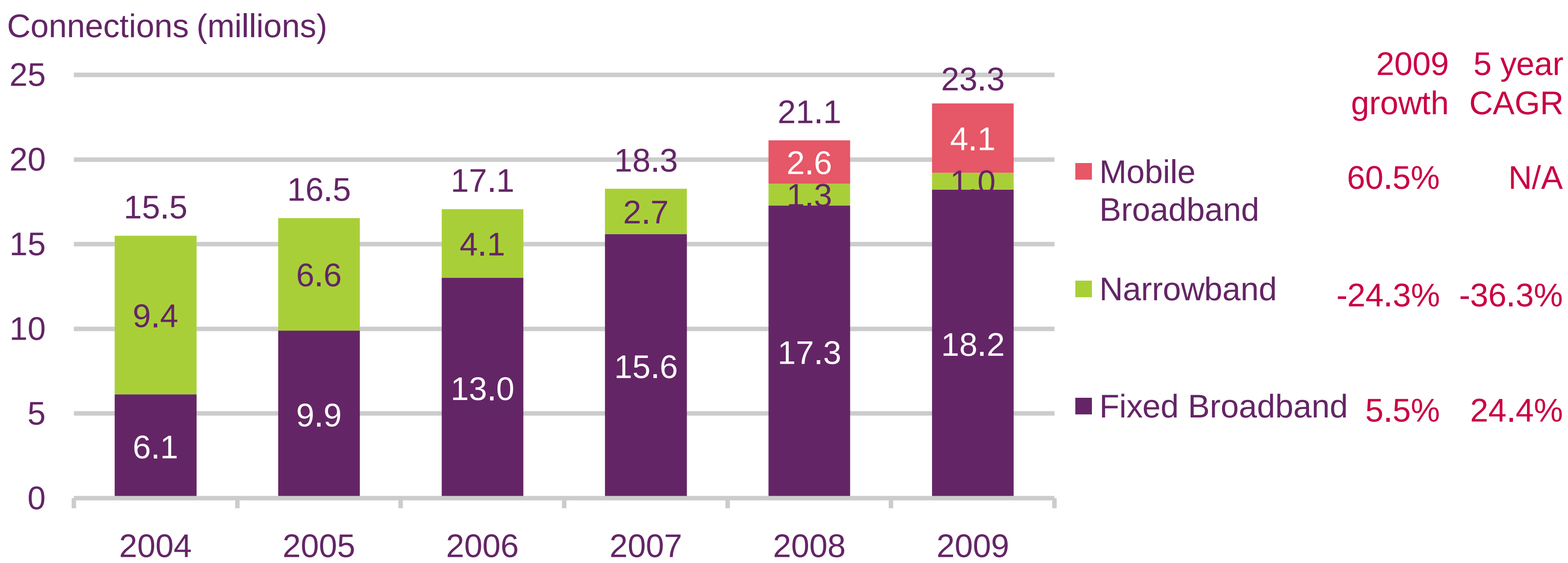
Source: Ofcom/Operators
Note: The split between revenue from rental, bundled calls and SMS AND voice revenue (outside bundle) is only available from 2006 onwards.

Mobile messaging volumes



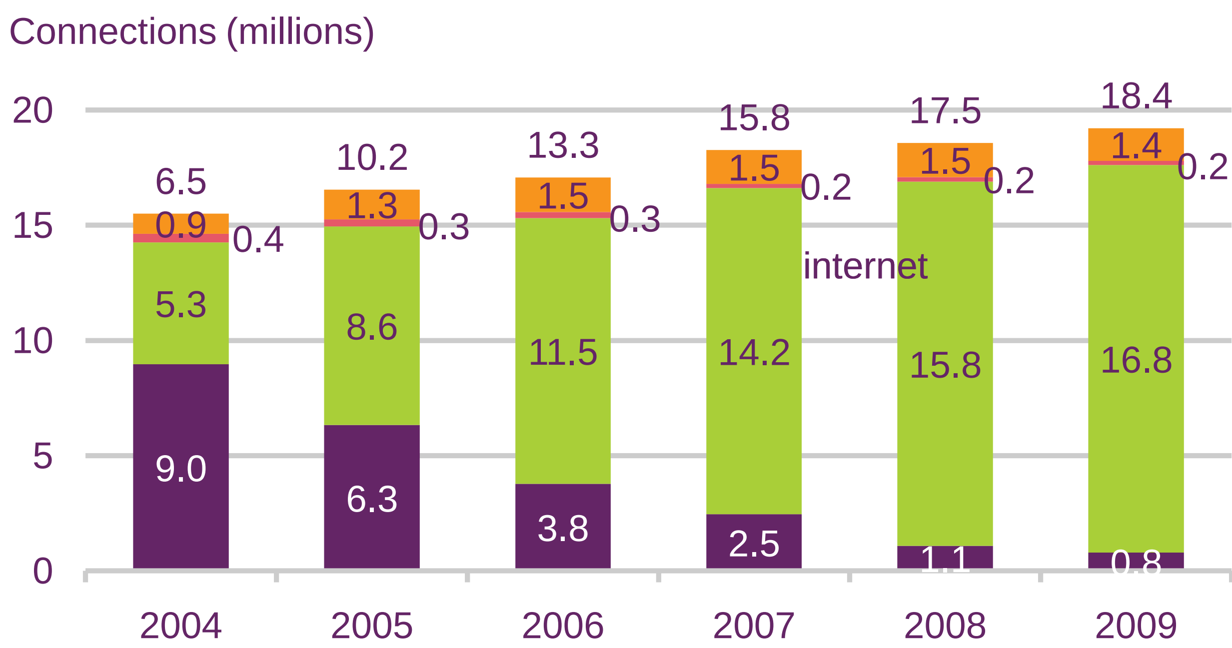
Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators

Estimated UK internet and broadband connections



Source: Ofcom / operators
Mobile broadband is defined as connection to the internet via a PC datacard or dongle

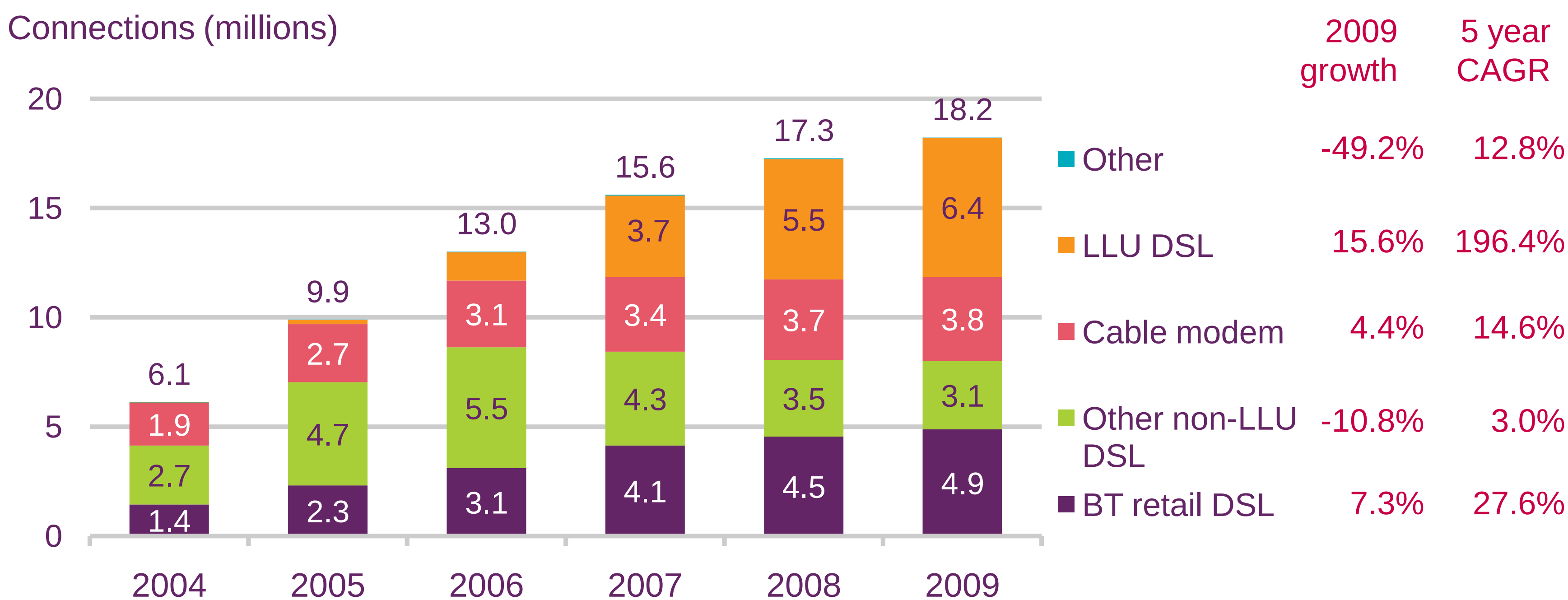
UK residential and small business internet connections



	2009 growth	5 year CAGR
SME broadband	-4.7%	10.2%
SME narrowband	-10.3%	-13.6%
Residential broadband	6.5%	26.1%
Residential narrowband	-27.2%	-38.5%

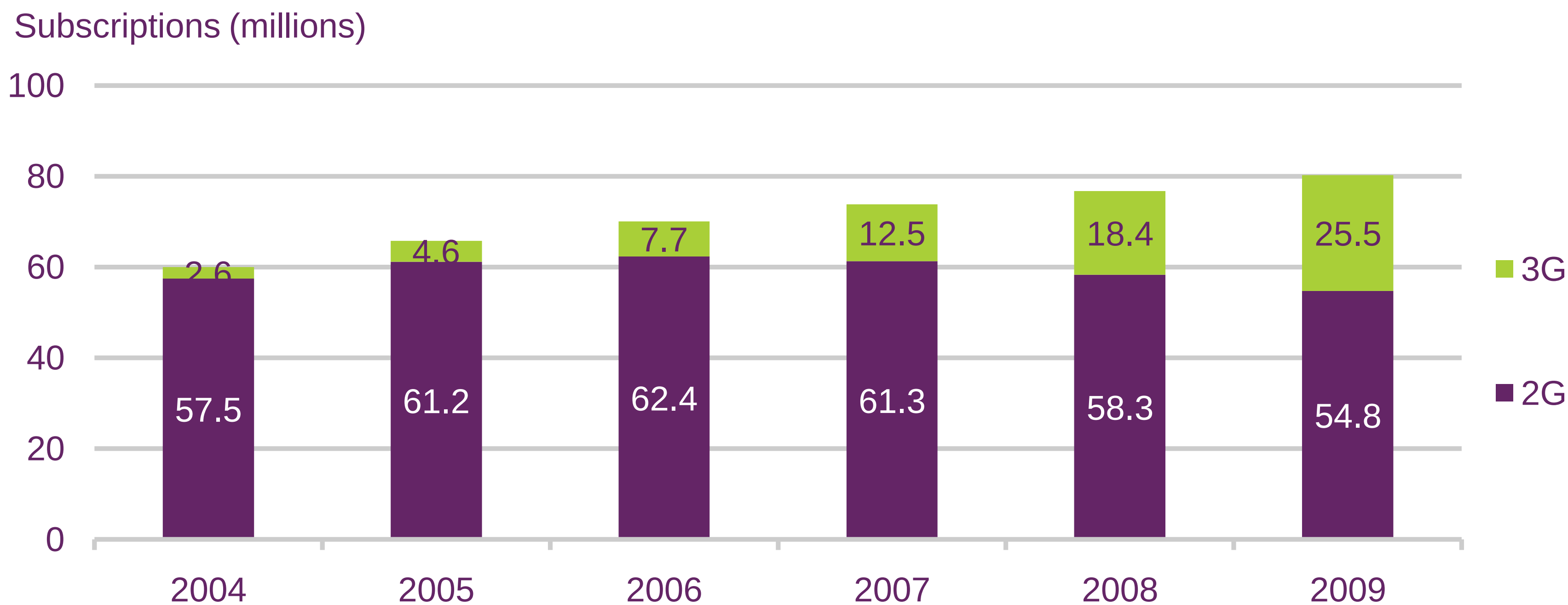
Source: Ofcom / operators
Note: SME broadband includes some connections over leased lines

UK residential and small business broadband connections



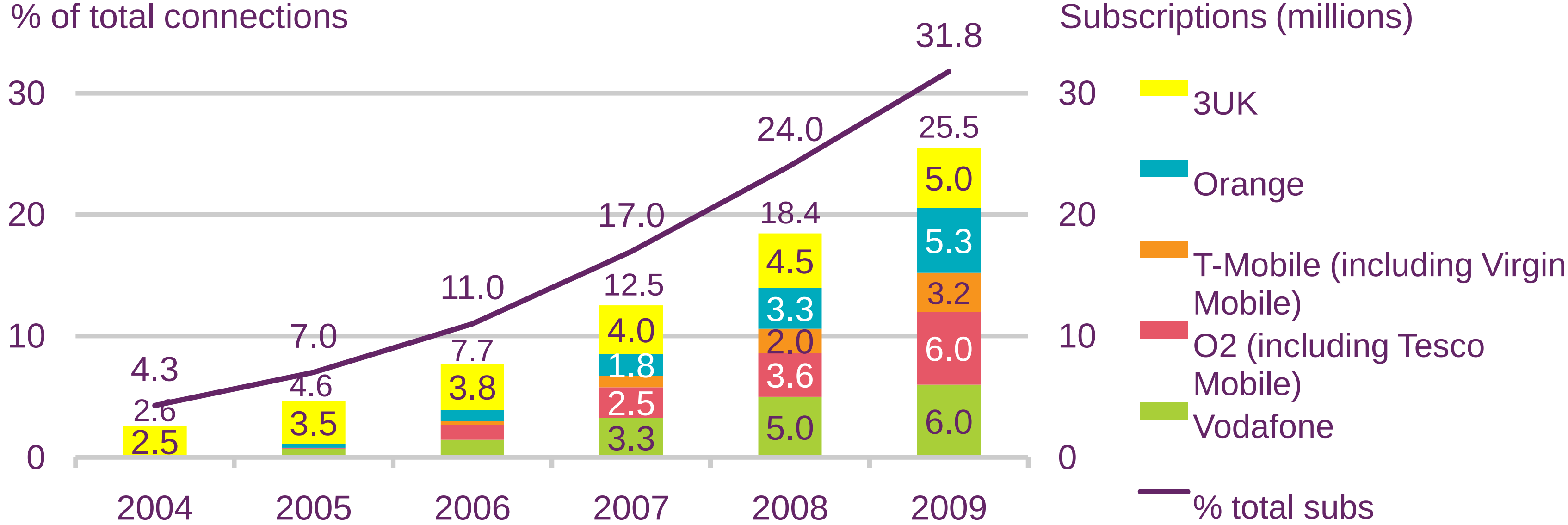
Source: Ofcom / operators
Note: Excludes connections made over cellular networks

2G and 3G share of mobile subscriptions



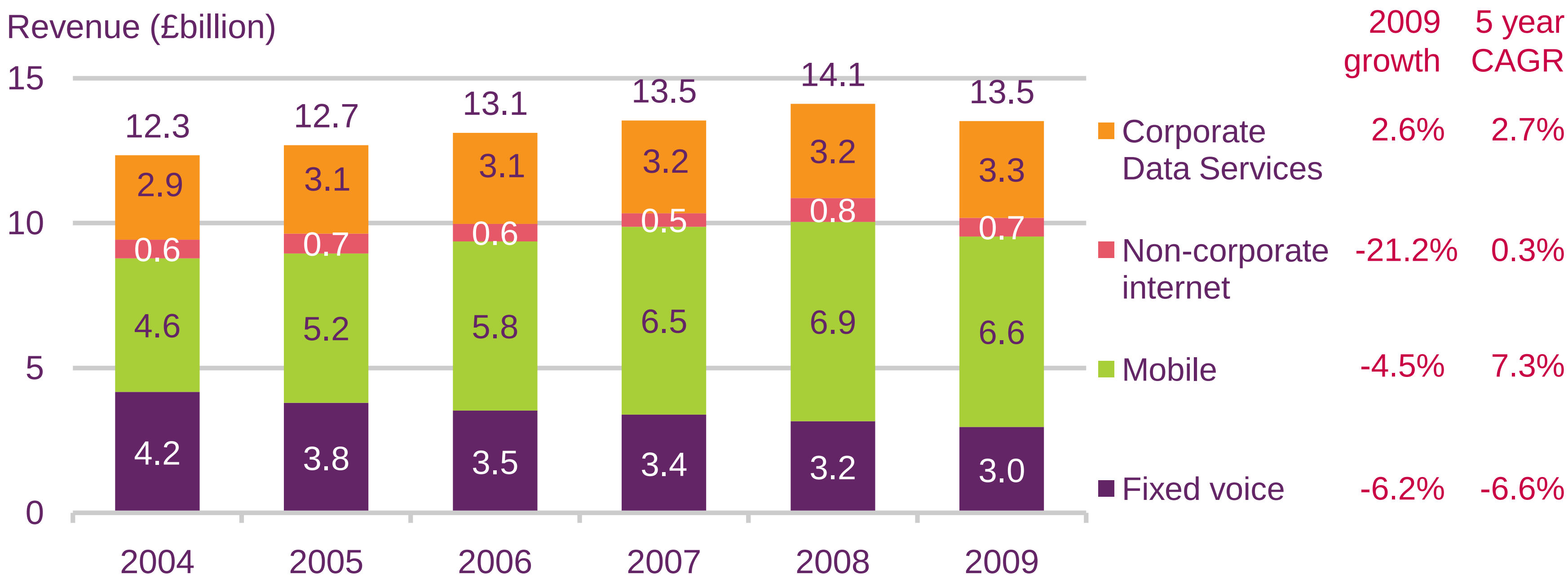
Source: Ofcom / operators /

3G subscriptions, by network operator



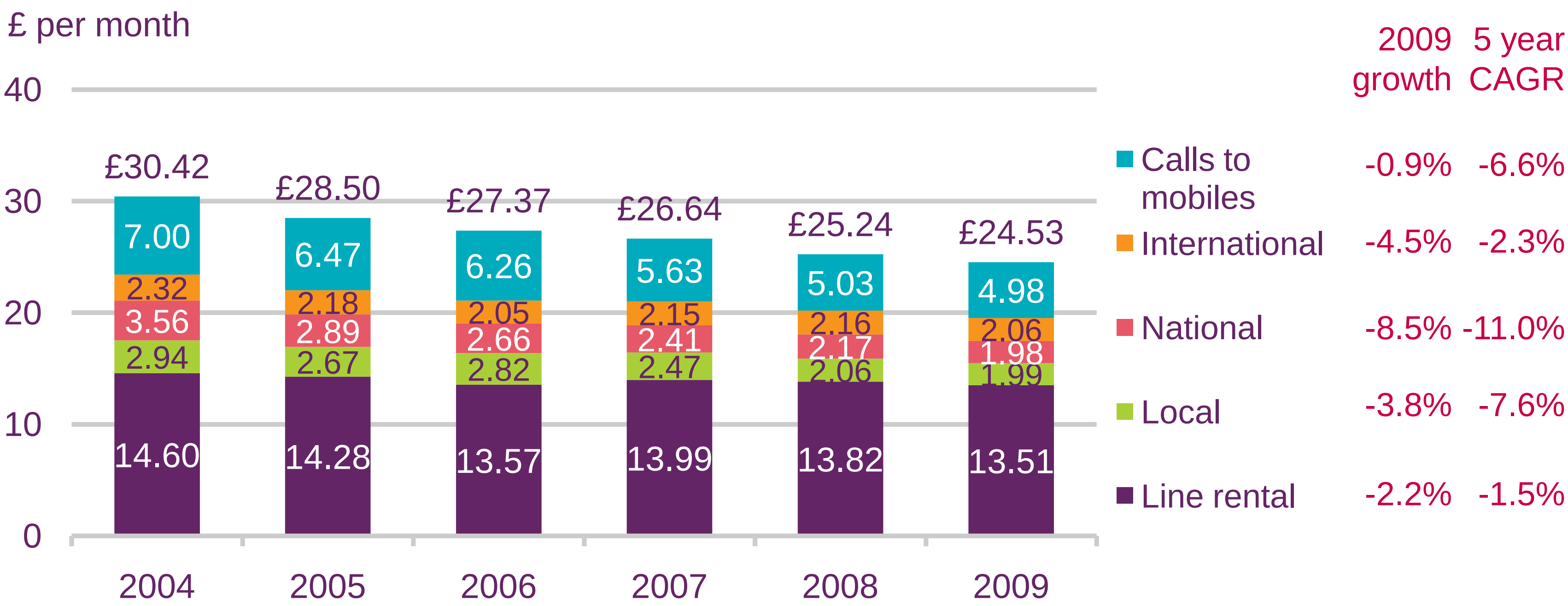
Source: Ofcom / operators
Note: 3G includes connections made via laptops/dongles as well as handsets

UK business telecoms services revenue



Source: Ofcom / operators / IDC

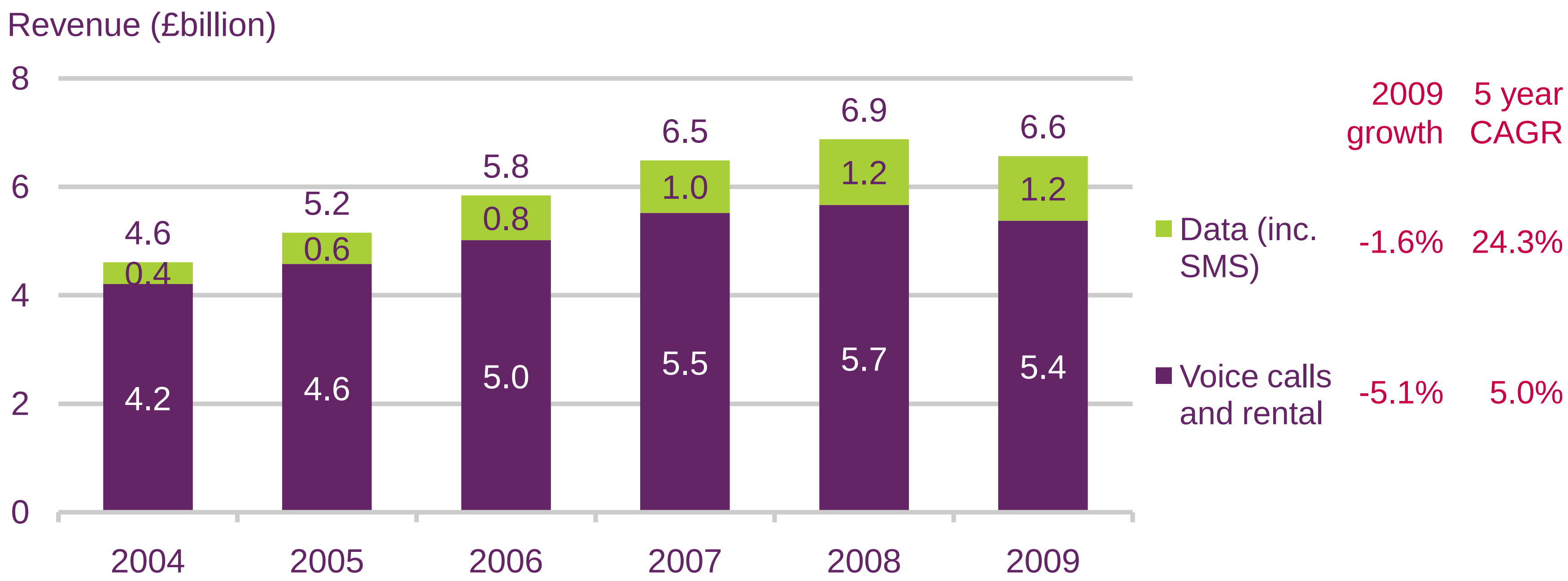
Average monthly voice revenue per business fixed line



Source: Ofcom / operators

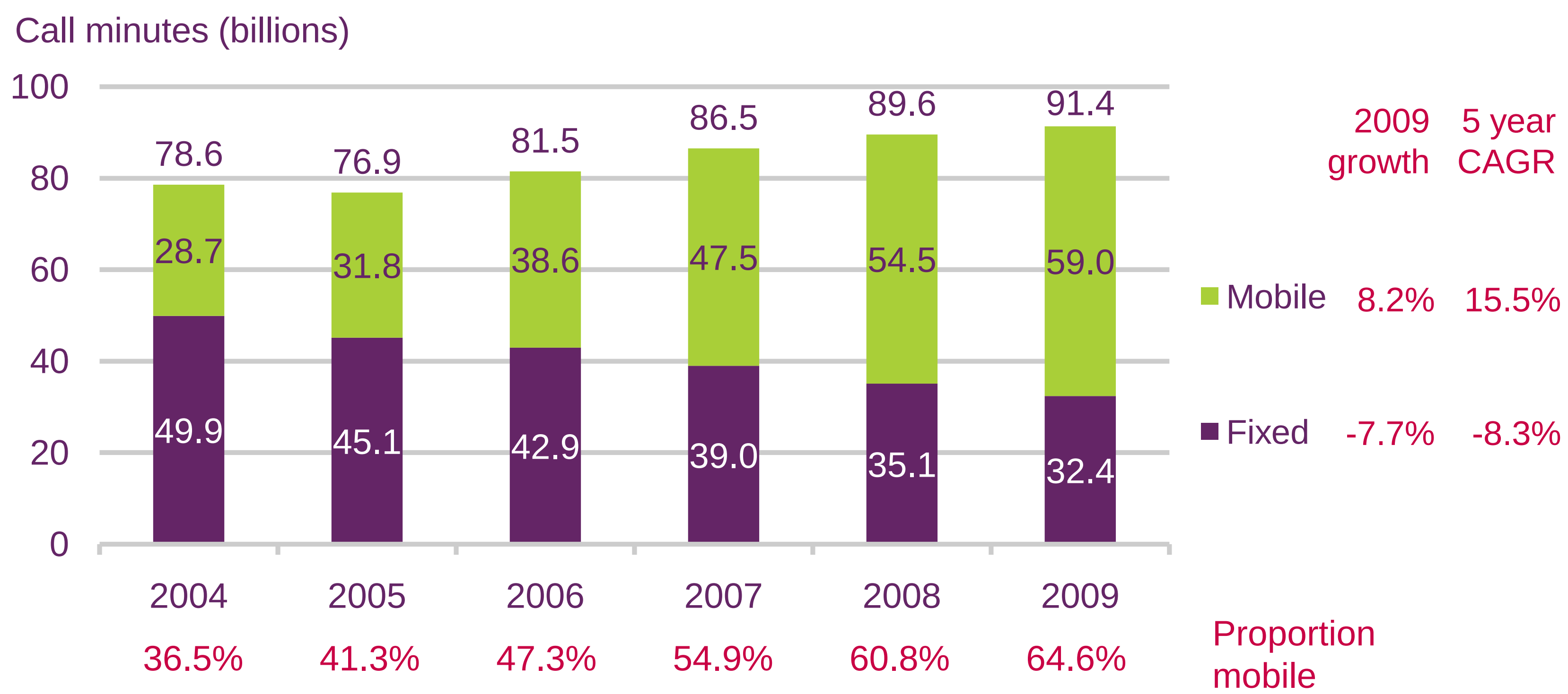
Note: Excludes revenues from non-geographic voice calls

Breakdown of business mobile revenue



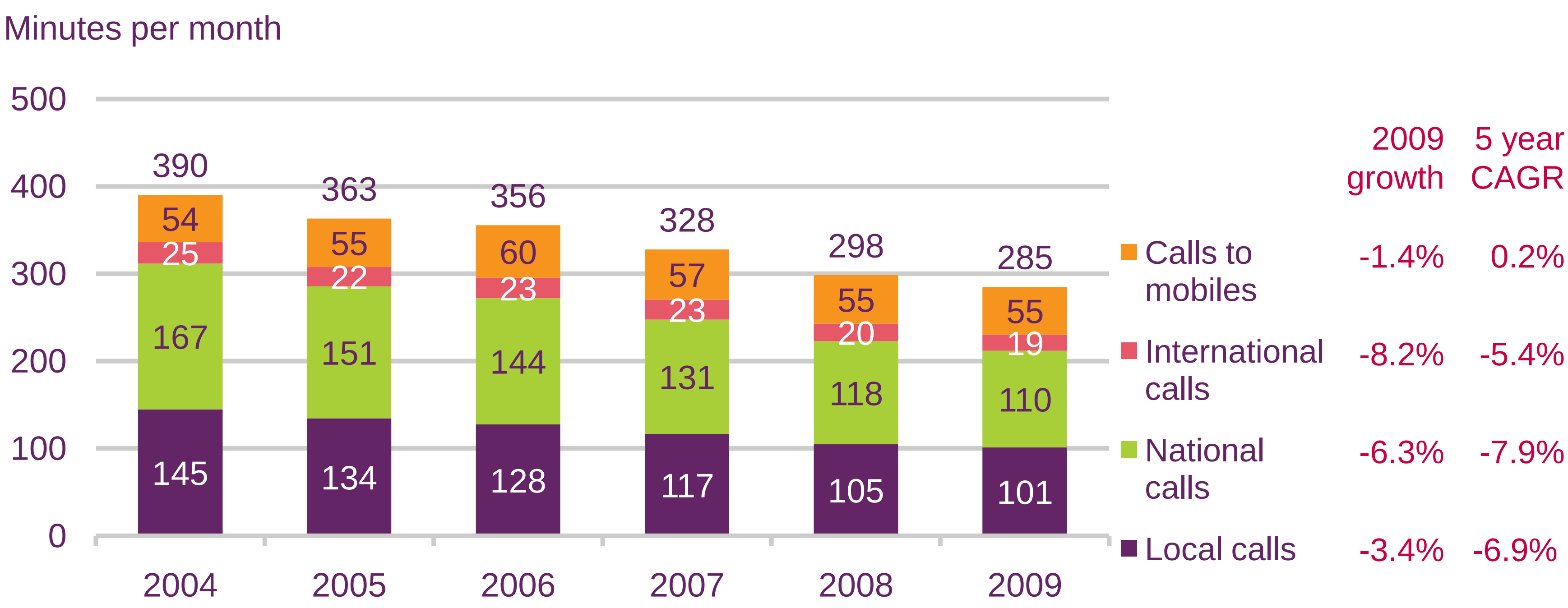
Source: Ofcom / operators

Business voice call volumes



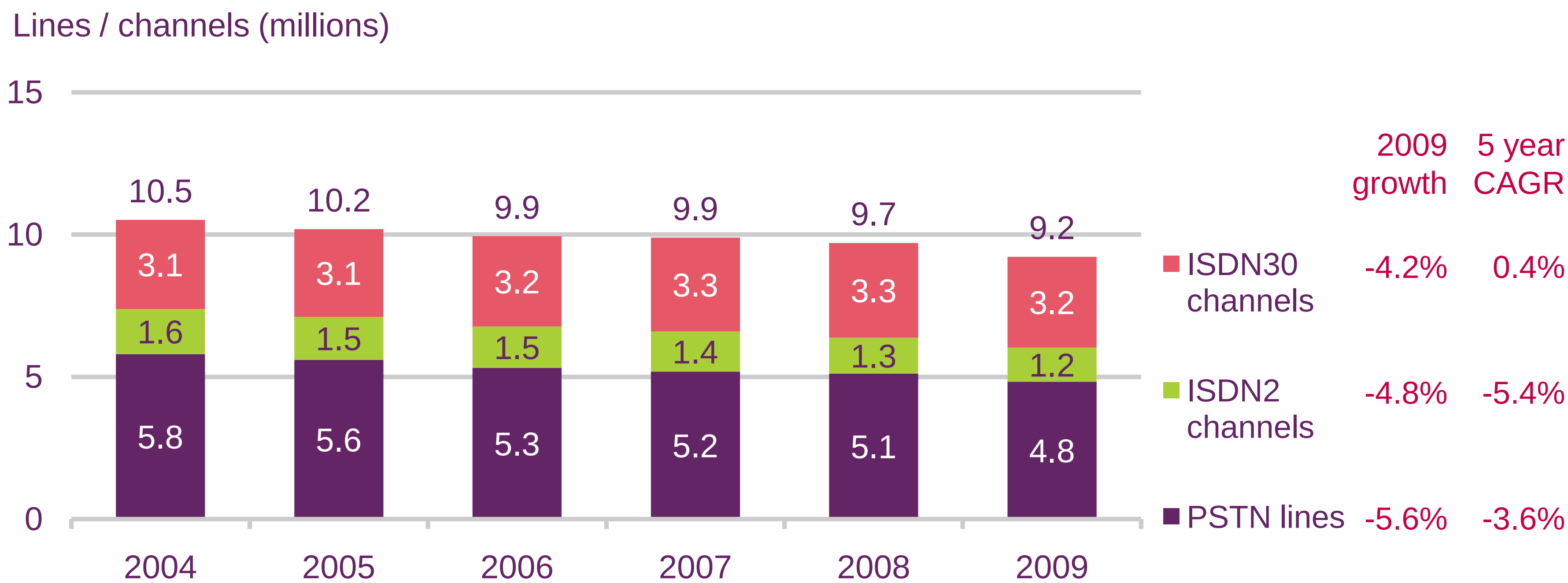
Source: Ofcom / operators
Note: Fixed data excludes non-geographic voice call volumes

Average monthly outbound voice call volumes per business fixed line



Source: Ofcom / operators
Note: Excludes non-geographic voice call volumes

Business fixed lines, by type



Source: Ofcom / operators
Note: Figures may be overstated due to an element of double-counting of WLR lines