

## **Annex 2.ii – TV viewing**

**UK and non-UK first-run and repeat programming: main five PSB channels**

**PSB Annual Report  
December 2014**

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- Five main PSB channels
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## Background

- This document provides bespoke analysis of viewing data provided by the Broadcasters' Audience Research Board (BARB). The analysis was undertaken by Attentional Ltd, a registered BARB Bureau.
- Attentional maintain a database of BARB programme data, and add to this a number of additional information fields that are not available from standard BARB datasets. These include repeat markings (based on listings data from a number of sources) and country of origin data, based on production company information. This allows BARB viewing data to be combined with custom fields to provide more in-depth analysis of UK broadcast output.

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## Methodology

- From Attentional's programme database, the relevant data for this analysis were extracted. These were:
  - programme durations and audience (all individuals aged 4+) from BARB;
  - repeat marking (new – first UK transmissions, including film premieres and repeat – any subsequent transmissions);
  - together with production company and origination data to identify country of origin of the programme material.
- Individual programmes were assigned to one of the four following groups and analysed:
  - First-run – UK
  - Repeat – UK
  - First-run – Non-UK
  - Repeat – Non-UK
- Single programmes whose transmissions are split across two days in the BARB data are excluded because of issues of matching information and gaining total average audiences.

## Methodology

- From the programme duration and audience data, Attentional created “viewer hours”. This is a volume measure of viewing obtained as follows:

$$((\text{Programme duration minutes}/60) \times \text{Average audience 000s})$$

- Programmes with start times between 1800 and 2230 are identified as peak time, to enable separate analysis of this daypart.
- The data is manipulated using pivot tables to produce for each year the percentage figures for the proportion of total output hours (duration) and viewing (viewer hours).

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## Summary – main five PSB channels

- Over the period 2008-2013, the total amount of all first-run UK output hours aired on the main five PSB channels declined by 9.2% from 20,592 hours in 2008 to 18,699 hours in 2013.
- However, while total viewing hours of this UK content decreased over the same period by 8.7%, it has grown its proportion of total viewing to the PSB channels from 72% to 75% (Figure 1).
- In peak time, there has been a small rise in the volume of UK first-run content aired – up 3.1% - while there has been a decrease of 7.7% in total viewer hours for this content.
- In proportion terms, first-run UK programming output in peak has remained broadly stable across the analysis period (70% of all hours in 2008 and 71% in 2013) while its share of viewing hours increased 5 percentage points compared to 2008. It accounted for 81% of viewing in 2008 and 86% in 2013 (Figure 2).

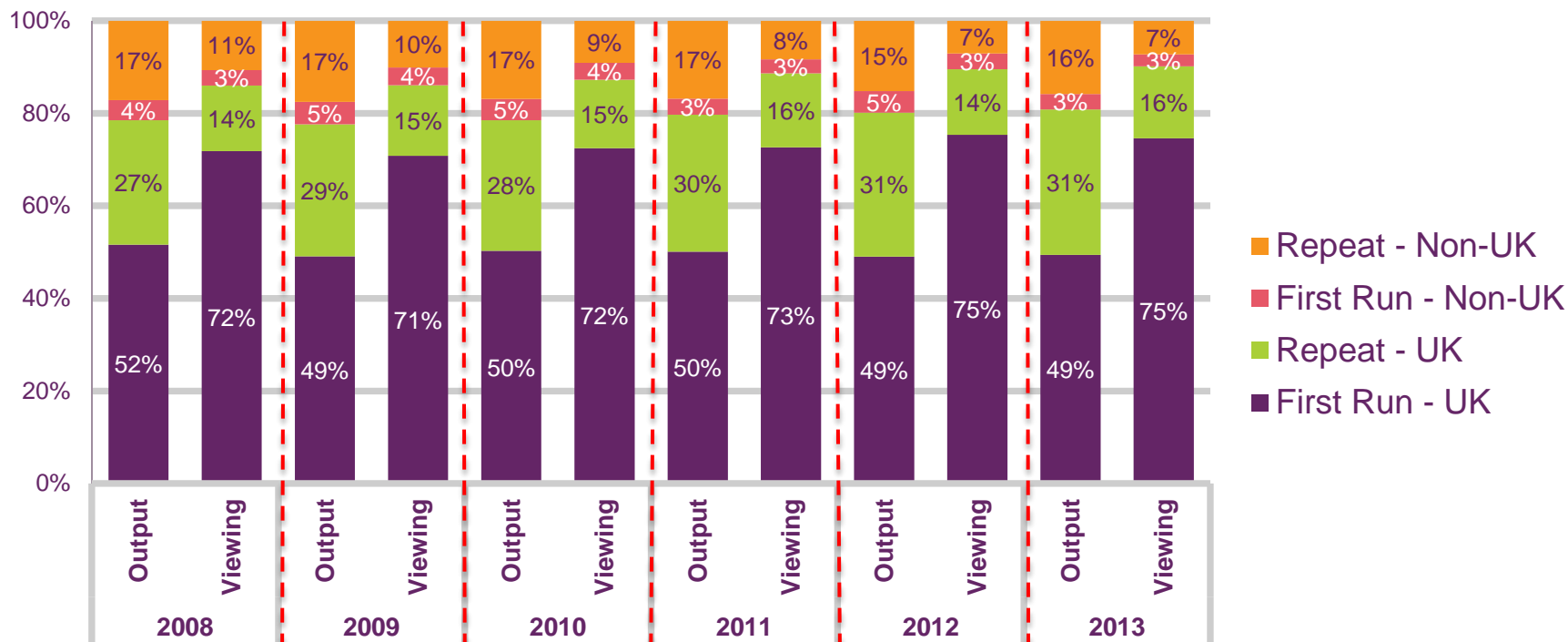


# Figure 1



## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: main five PSBs, all day

Proportion of hours



Output Hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	1746	1931	1826	1359	1786	1282
First Run - UK	20592	19545	20024	19723	18830	18699
Repeat - Non-UK	6831	6965	6727	6627	5847	5983
Repeat - UK	10735	11367	11253	11672	11948	11889
<b>Grand total</b>	<b>39904</b>	<b>39807</b>	<b>39830</b>	<b>39381</b>	<b>38411</b>	<b>37854</b>

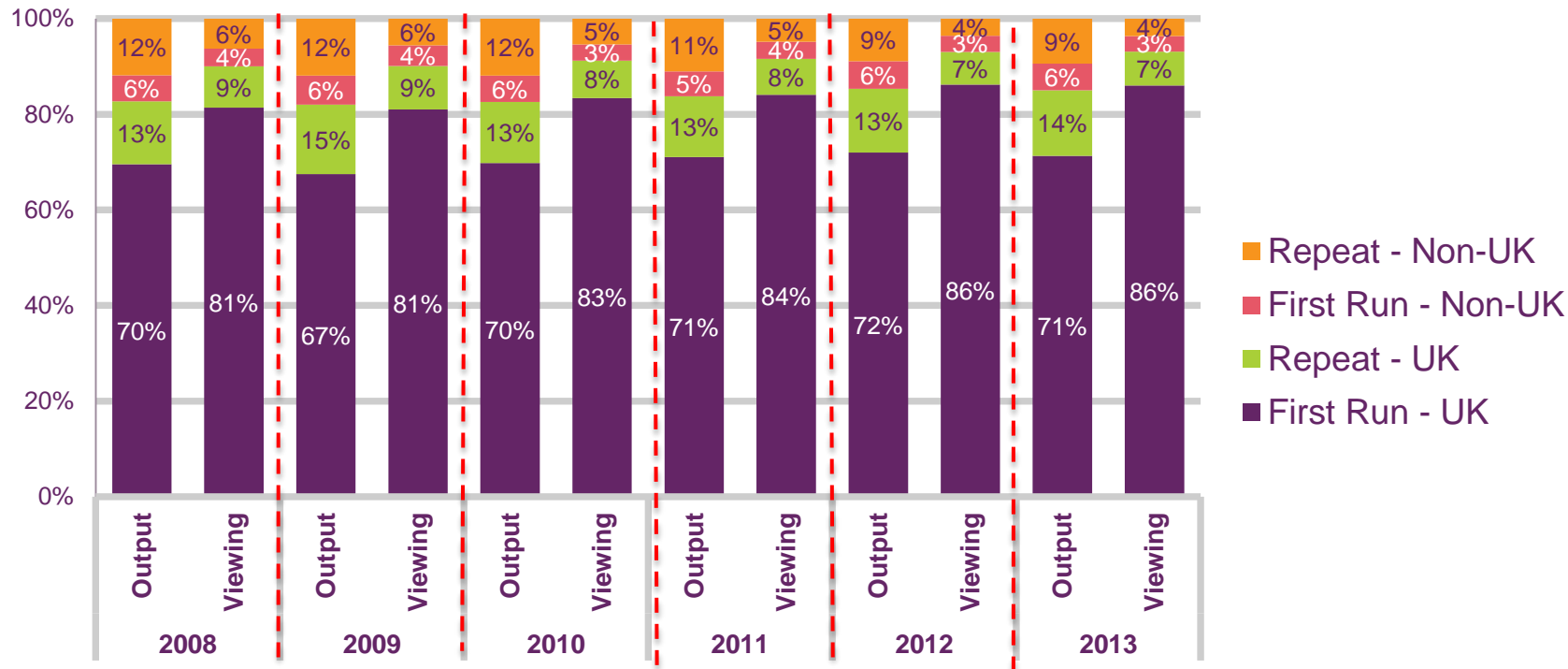
Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, all day. Main five PSBs = BBC One, BBC Two, ITV, Channel 4 and Channel 5 including HD channel variants but excluding +1s.

# Figure 2



## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: main five PSBs, peak time

Proportion of hours



Output Hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	422	468	424	400	448	432
First Run - UK	5340	5191	5372	5500	5584	5503
Repeat - Non-UK	908	915	917	856	689	727
Repeat - UK	1008	1118	985	983	1037	1057
<b>Grand total</b>	<b>7678</b>	<b>7692</b>	<b>7700</b>	<b>7740</b>	<b>7759</b>	<b>7718</b>

Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, peak time (6pm – 10:30pm). Main five PSBs = BBC One, BBC Two, ITV, Channel 4 and Channel 5 including HD channel variants but excluding +1s.

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## Summary – BBC One

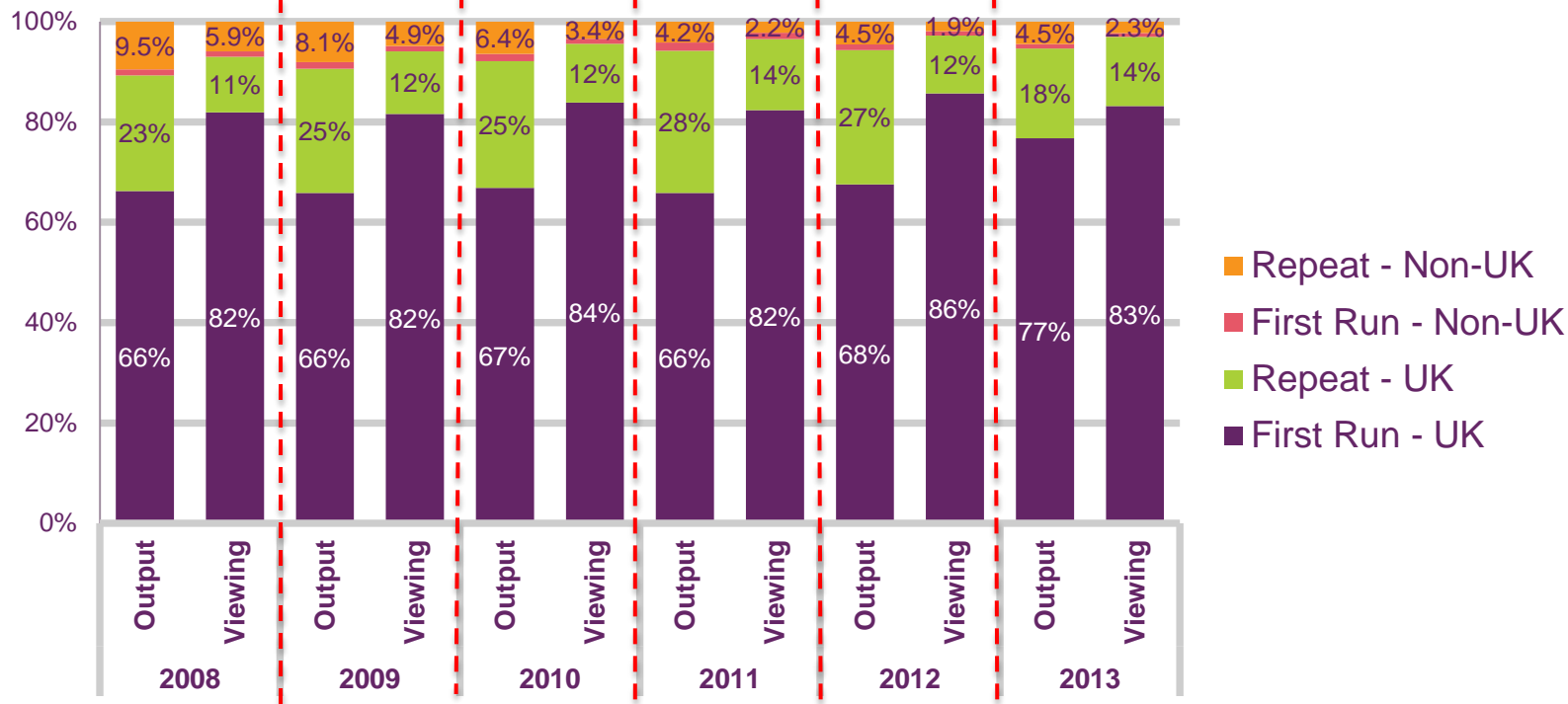
- The proportion of UK first-run programming on BBC One was 77% (6,351 hours) of the channel's total output hours in 2013, compared with 66% (5,460 hours) in 2008. While the growth in output hours of UK first-run programming was 16.3% over this period, it has only driven the volume of viewing (viewer hours) up by 3.3% (Figure 3).
- A fall of 21.8% in the hours of UK repeat transmission output (from 1,896 hours in 2008 to 1,482 in 2013) has not prevented a rise of 26.9% in the volume of viewing they attract. In proportion terms, UK repeats on BBC One decreased over the period from 23% of output in 2008 to 18% in 2013. Despite the reduction in output, the proportion of viewing hours generated from UK repeats has increased from 11% of viewing in 2008 to 14% in 2013 (Figure 3).
- BBC One peak time has a schedule almost entirely based on UK first-run programmes, filling 91% of the schedule. This figure has remained fairly stable between 2008 and 2013, with just a 4 percentage point variation over the period (Figure 4).
- Together with UK repeats, UK content accounted for 98% (1,449 hours) of BBC One's peak time transmissions output in 2013 and 98% of viewing hours to the channel (Figure 4).

# Figure 3

## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: BBC One, all day



Proportion of hours



Output Hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	98	111	117	131	92	75
First Run - UK	5460	5412	5491	5403	5559	6351
Repeat - Non-UK	787	662	529	344	374	370
Repeat - UK	1896	2033	2077	2329	2201	1482
<b>Grand total</b>	<b>8241</b>	<b>8218</b>	<b>8214</b>	<b>8207</b>	<b>8227</b>	<b>8277</b>

Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, all day.

# Figure 4

## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: BBC One, peak time



Output Hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	11	28	8	10	8	7
First Run - UK	1310	1287	1328	1299	1360	1351
Repeat - Non-UK	44	43	11	23	19	21
Repeat - UK	103	111	103	117	74	98
<b>Grand total</b>	<b>1468</b>	<b>1468</b>	<b>1449</b>	<b>1450</b>	<b>1461</b>	<b>1477</b>

Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, peak time (6pm – 10:30pm).

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# Summary – BBC Two



- BBC Two has gone through a schedule revamp since 2012 as part of the Delivering Quality First initiative. Some of the channel's most popular programmes have transferred to BBC One, and the proportion of UK repeat programming has increased on the channel.
- UK repeats accounted for 50% (3,678 hours) of BBC Two's all-day output in 2013, compared with 44% (3,525 hours) in 2012 and 37% (3,029 hours) in 2008 (Figure 5). Over the same period, the time spent watching UK repeats on the channel in absolute hours declined by 9.3% compared to 2008 and 10.6% compared to 2012. As a proportion of viewing to all programming, UK repeats accounted for a relatively modest increase in comparison to the greater proportional increases in output. In 2013 it accounted for 30% of viewing, the same as 2012 and 5pp more than the 25% in 2008 (Figure 5).
- Non-UK programming (both first-run and repeats) output has almost halved from 16% of all programming on BBC Two in 2008 to 9% in 2013 (1,290 to 616 in absolute hours). This has led to a drop in viewing to such content from 10% of all viewing in 2008 to 5% in 2013. (Figure 5).
- UK first-run programming accounted for 42% (3,133 hours) of the channel's all-day output in 2013. This is a decline on 47% (3,769) in 2008. Despite a 22.2% fall in viewing hours between 2008 and 2013 to this content, as a proportion of all viewing hours to the channel this has remained the same (65% in 2008 and 2013) (Figure 5).
- First-run UK programming remains the most watched content on BBC Two in peak time. Despite a 6.9% reduction in absolute hours compared to 2008, it has increased as a proportion of the channel's total output (70% in 2008 and 73% in 2013) and as a proportion of viewing hours to the channel (74% of viewing hours in 2008 to 80% in 2013). (Figure 6).

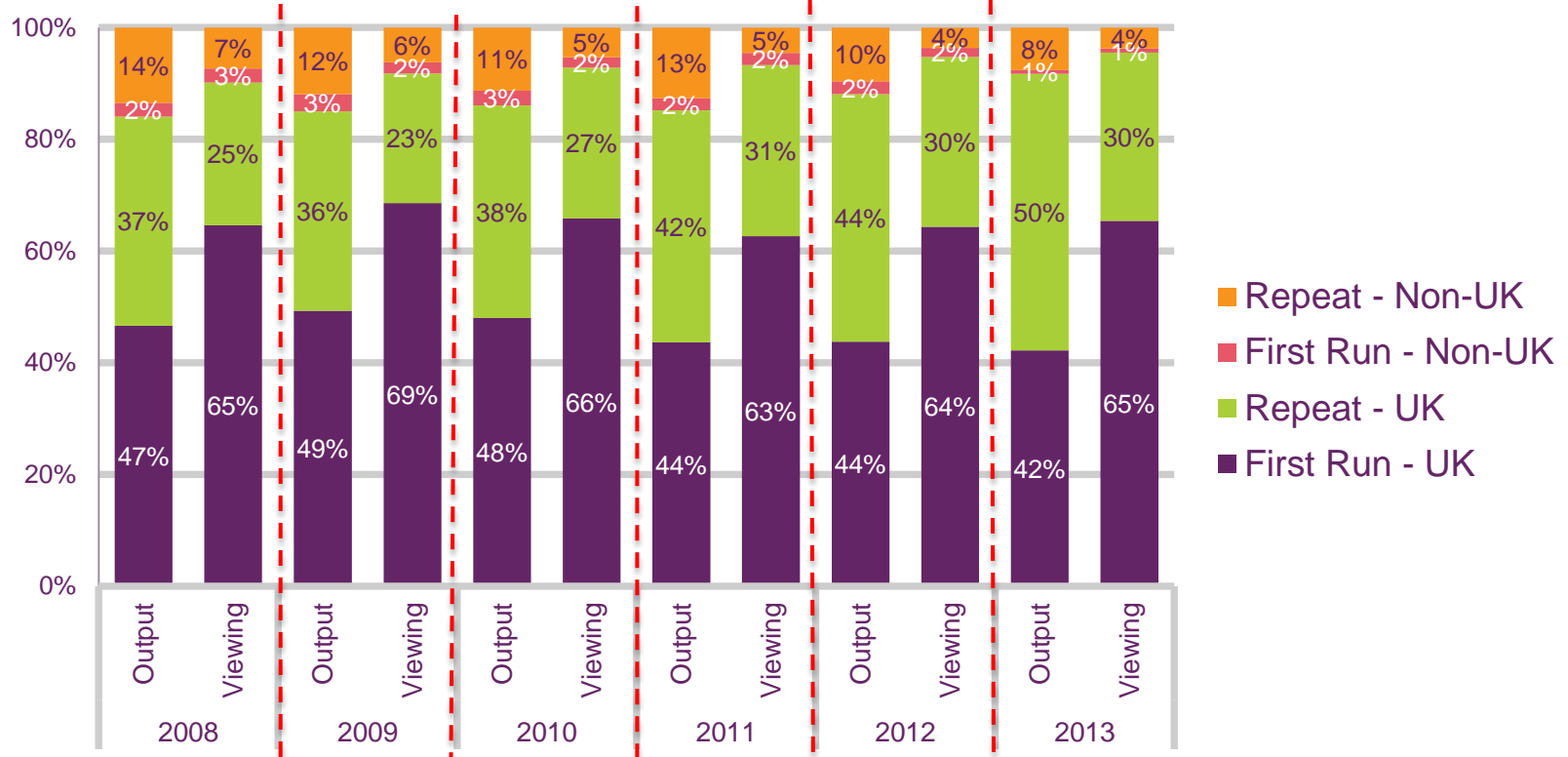


# Figure 5

## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: BBC Two, all day



Proportion of hours



Output Hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	197	240	204	170	181	50
First Run - UK	3769	3902	3733	3380	3480	3133
Repeat - Non-UK	1093	945	878	979	767	566
Repeat - UK	3029	2829	2959	3216	3525	3678
<b>Grand total</b>	<b>8087</b>	<b>7916</b>	<b>7774</b>	<b>7744</b>	<b>7953</b>	<b>7428</b>

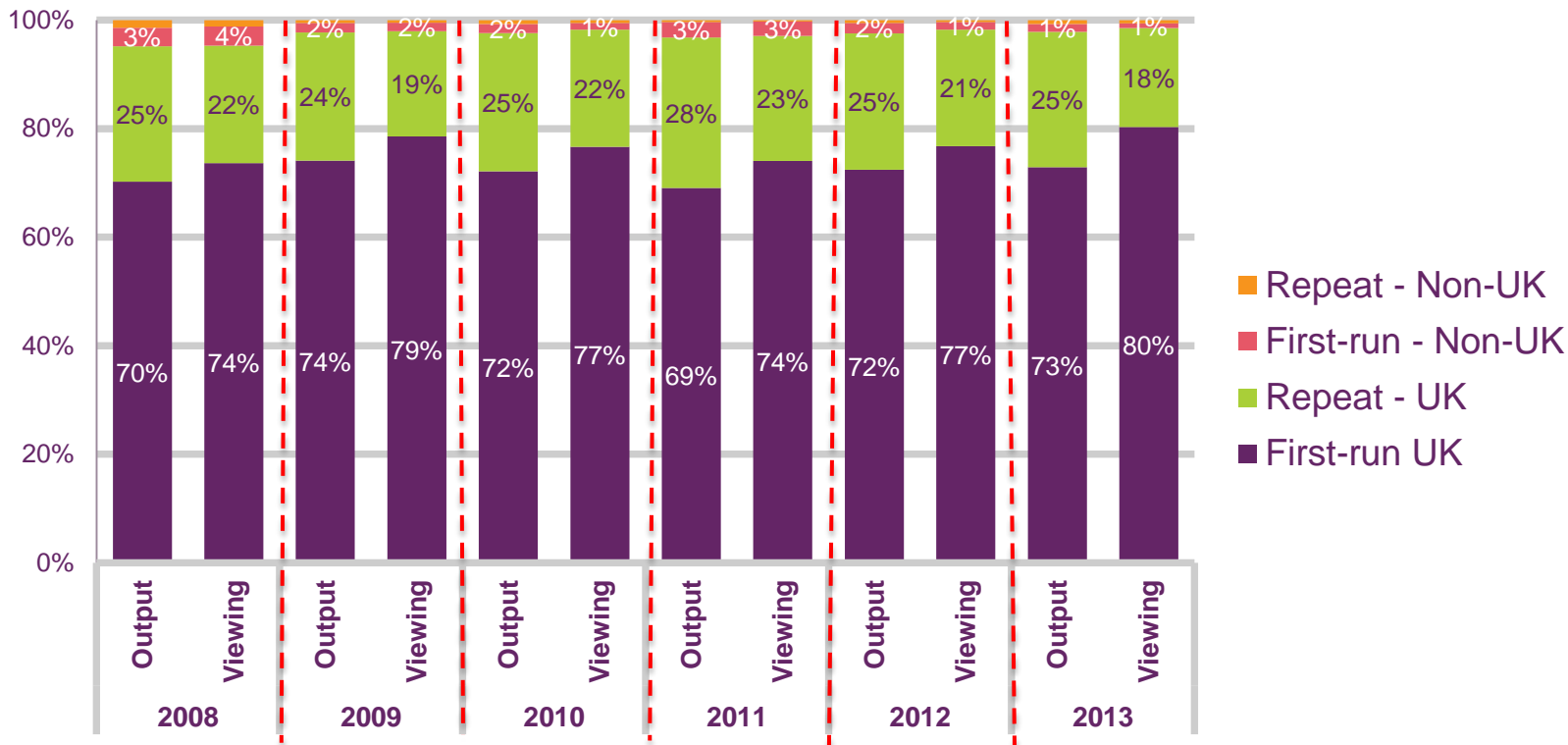
Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, all day.

# Figure 6

## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: BBC Two, peak time



Proportion of hours



Output hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	52	26	26	37	29	21
First Run - UK	1076	1104	1060	1059	1110	1091
Repeat - Non-UK	22	10	11	5	8	9
Repeat - UK	383	353	381	428	390	378
<b>Grand total</b>	<b>1533</b>	<b>1493</b>	<b>1477</b>	<b>1529</b>	<b>1538</b>	<b>1500</b>

Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, peak time (6pm – 10:30pm).

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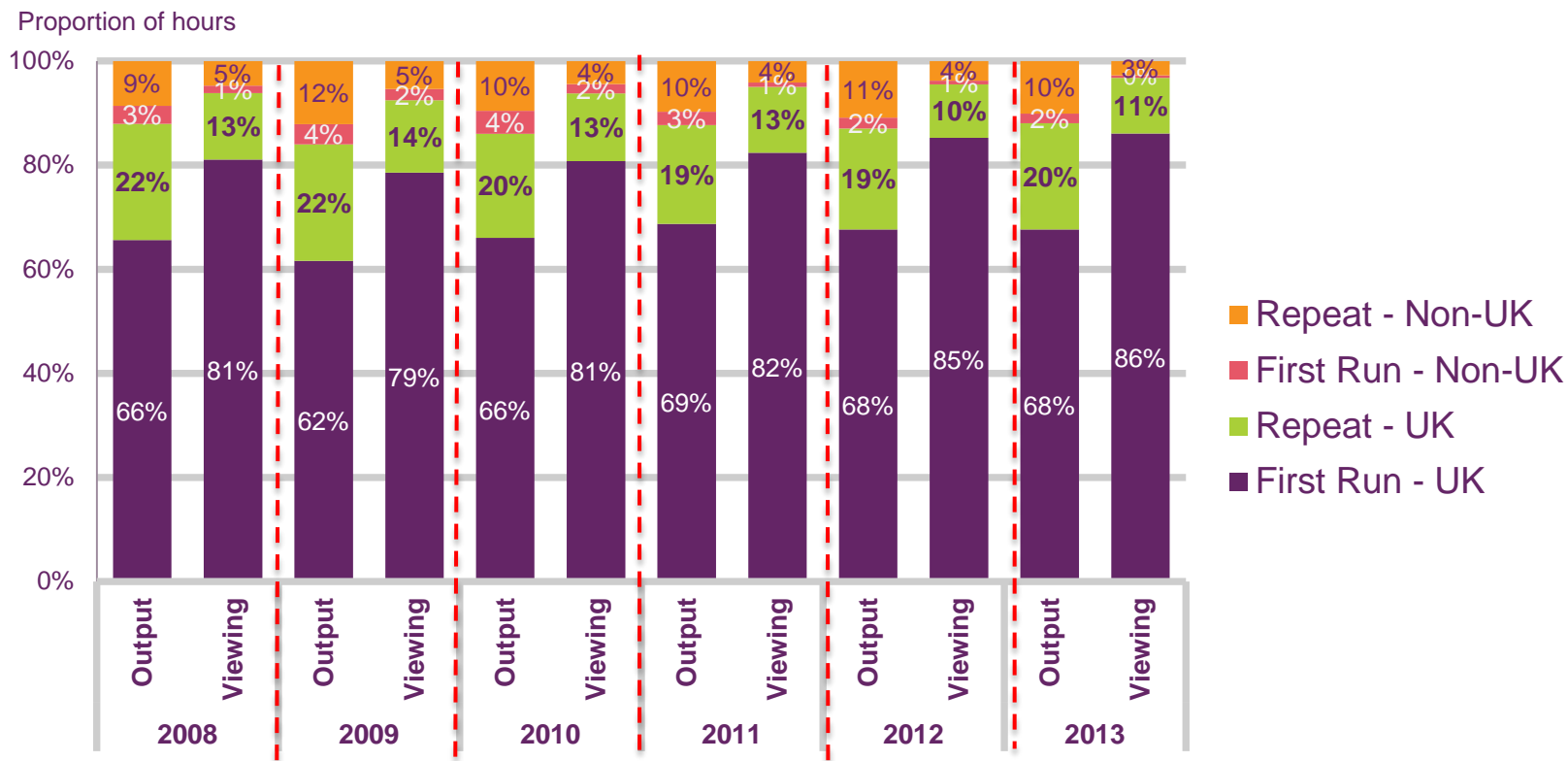
## Summary - ITV

- ITV saw a small rise in the proportion of UK first-run transmissions (from 66% to 68% of output hours although overall hours of programming have declined slightly), but a more significant increase in the viewing this delivers (81% in 2008 to 86% in 2013) (Figure 7).
- Repeat UK programming has fallen from 1,698 hours in 2008 to 1,462 hours in 2013 (a 13.8% decrease in volume) although this represented a slight increase (of 3.6%) from 2012 (1,413 hours). As a proportion of all viewing hours on the channel, UK repeats accounted for a fifth (20%) of output which generated an 11% share of all viewing to the channel in 2013. In 2008, 22% of UK repeats output generated 13% of viewing (Figure 7).
- While the hours of non-UK repeats are higher in 2013 than 2008 (up to 723 hours from 657 in 2008), they have fallen since 2009 (942 hours). As a proportion of all programme hours on ITV, non-UK repeats accounted for a marginally higher share in 2013 (10%) than 2008 (9%) but lower than in 2012 (11%) and the peak of 2009 (12%) (Figure 7). The proportional viewing that non-UK repeats accounted for fell to a low of 3% in 2013 compared to a peak of 5% in 2008 and 2009 (Figure 7).
- In peak time, ITV schedule and viewing patterns have remained stable across the six-year period, with UK first-run content taking the vast majority share of viewing and output hours. New UK programmes have consistently accounted for 95% share of all viewing in peak time on ITV since 2011, up 3pp from 92% in 2008 (Figure 8).

# Figure 7



## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: ITV, all day



Output Hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	260	297	345	200	151	133
First Run - UK	4986	4769	5167	5366	4928	4846
Repeat - Non-UK	657	942	752	763	793	723
Repeat - UK	1698	1736	1565	1481	1413	1462
<b>Grand total</b>	<b>7600</b>	<b>7744</b>	<b>7829</b>	<b>7810</b>	<b>7286</b>	<b>7165</b>

Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, all day.

# Figure 8

## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: ITV, peak time



Output hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	18	31	25	16	7	19
First Run - UK	1225	1213	1252	1262	1270	1287
Repeat - Non-UK	28	27	30	44	14	22
Repeat - UK	108	127	122	92	117	88
<b>Grand total</b>	<b>1380</b>	<b>1397</b>	<b>1429</b>	<b>1415</b>	<b>1407</b>	<b>1417</b>

Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, peak time (6pm – 10:30pm).

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## Summary – Channel 4

- Channel 4 maintains a strongly diverse schedule. Between 2008 and 2013 hours of first-run UK transmissions have fallen from 3,257 hours in 2008 to 2,837 hours in 2013 (a 12.9% decrease). As a proportion of all programming output on the channel this translates as 41% of the daily schedules in 2008 and 35% in 2013 (a 6pp point fall) (Figure 9).
- Over the period of analysis the volume of viewing hours to this type of output declined by 34.2% compared to 2008. As a share of all viewing hours to the channel, the fall was less marked - it represented 61% of all viewing in 2008 and 57% in 2013 (a 4pp decrease) (Figure 9).
- The proportion of UK repeats has seen slight growth, from 32% to 34% of the output hours, but a more significant rise has been in the number of non-UK repeats. The proportion has risen from 21% (1,687 hours) in 2008, to 26% (2,067 hours) in 2013 (Figure 9).
- Channel 4's peak time schedule continues to comprise a large proportion of UK first-run output. In absolute hours there has been a small increase from 1,046 hours in 2008 to 1,097 in 2013 (slightly lower than the 1,145 hours in 2012). As a proportion of all programming, the distribution of new UK programming increased 3pp from 62% in 2008 to 65% in 2013 (although it represented a 3pp fall from 68% in 2012). Viewing share also increased from 64% in 2008 to 66% of all programming in 2013 (a 2pp increase) (Figure 10).
- The distribution of UK repeats in peak time saw a slight dip compared to 2008 (15% of all output in 2008 and 14% in 2013) and a small increase compared to the 13% in 2011 and 2012. The contribution of UK repeats to Channel 4's peak time schedule reached a high of 19% in 2009 (Figure 10).

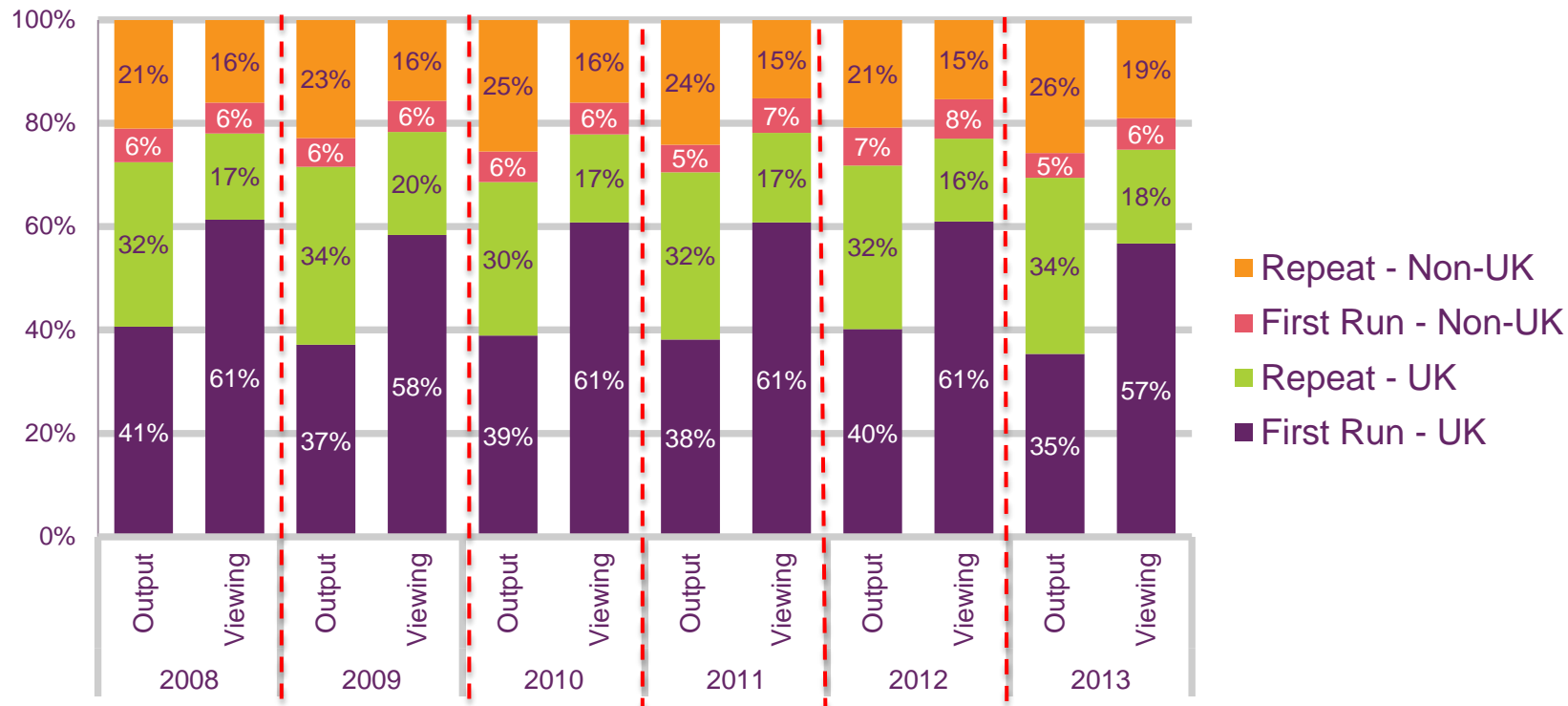


# Figure 9



## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: Channel 4, all day

Proportion of hours



Output Hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	517	448	478	427	587	382
First Run - UK	3257	2972	3126	3058	3231	2837
Repeat - Non-UK	1687	1825	2045	1935	1678	2067
Repeat - UK	2555	2751	2386	2599	2548	2734
Grand total	8016	7997	8036	8019	8044	8020

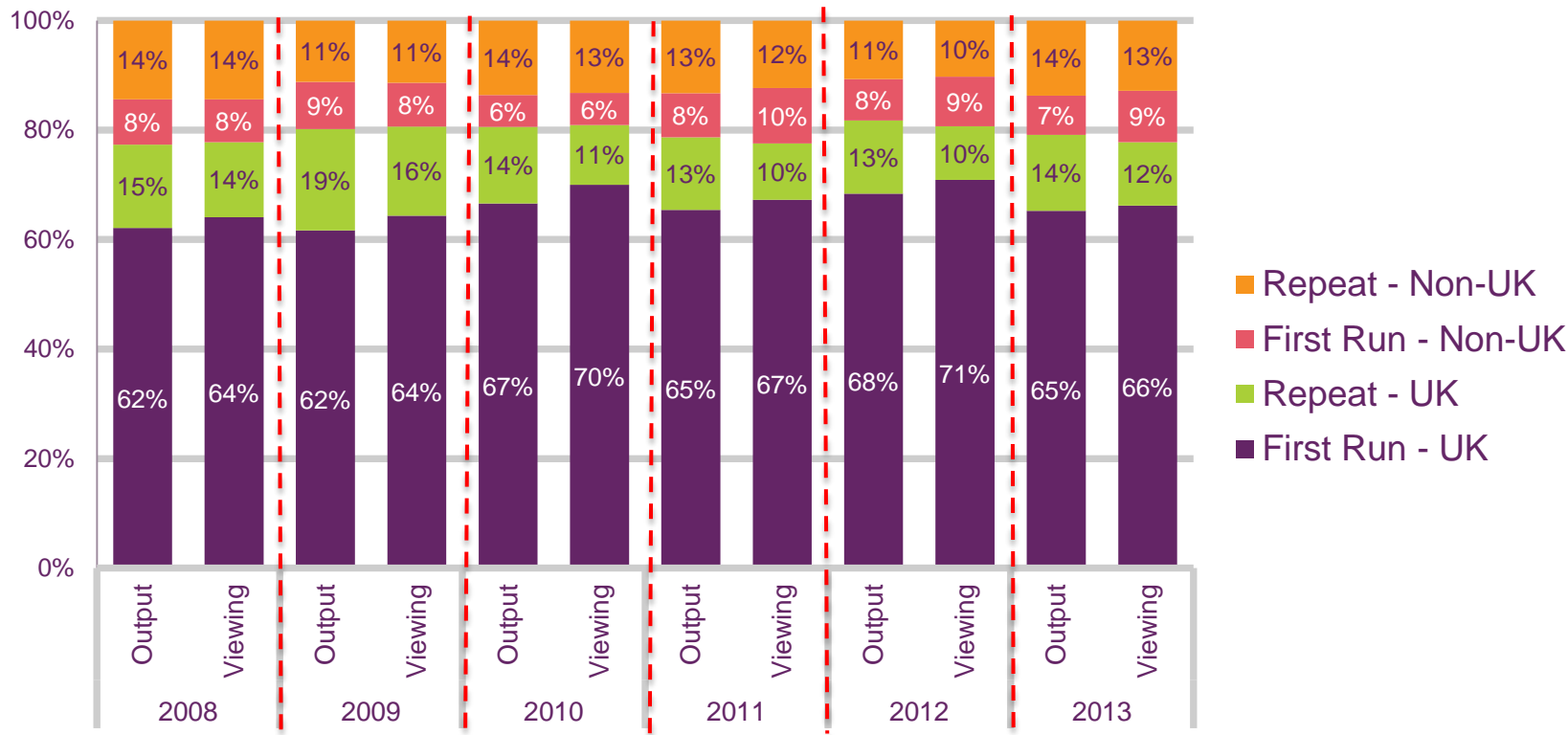
Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, all day. Main five PSBs = BBC One, BBC Two, ITV, Channel 4 and Channel 5 including HD channel variants but excluding +1s.

# Figure 10

## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: Channel 4, peak time



Proportion of hours



Output hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	140	146	99	138	126	120
First Run - UK	1046	1046	1128	1123	1145	1097
Repeat - Non-UK	242	190	230	228	180	231
Repeat - UK	256	314	237	228	224	233
<b>Grand total</b>	<b>1684</b>	<b>1696</b>	<b>1694</b>	<b>1716</b>	<b>1674</b>	<b>1682</b>

Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, peak time (6pm – 10:30pm). Main five PSBs = BBC One, BBC Two, ITV, Channel 4 and Channel 5 including HD channel variants but excluding +1s.

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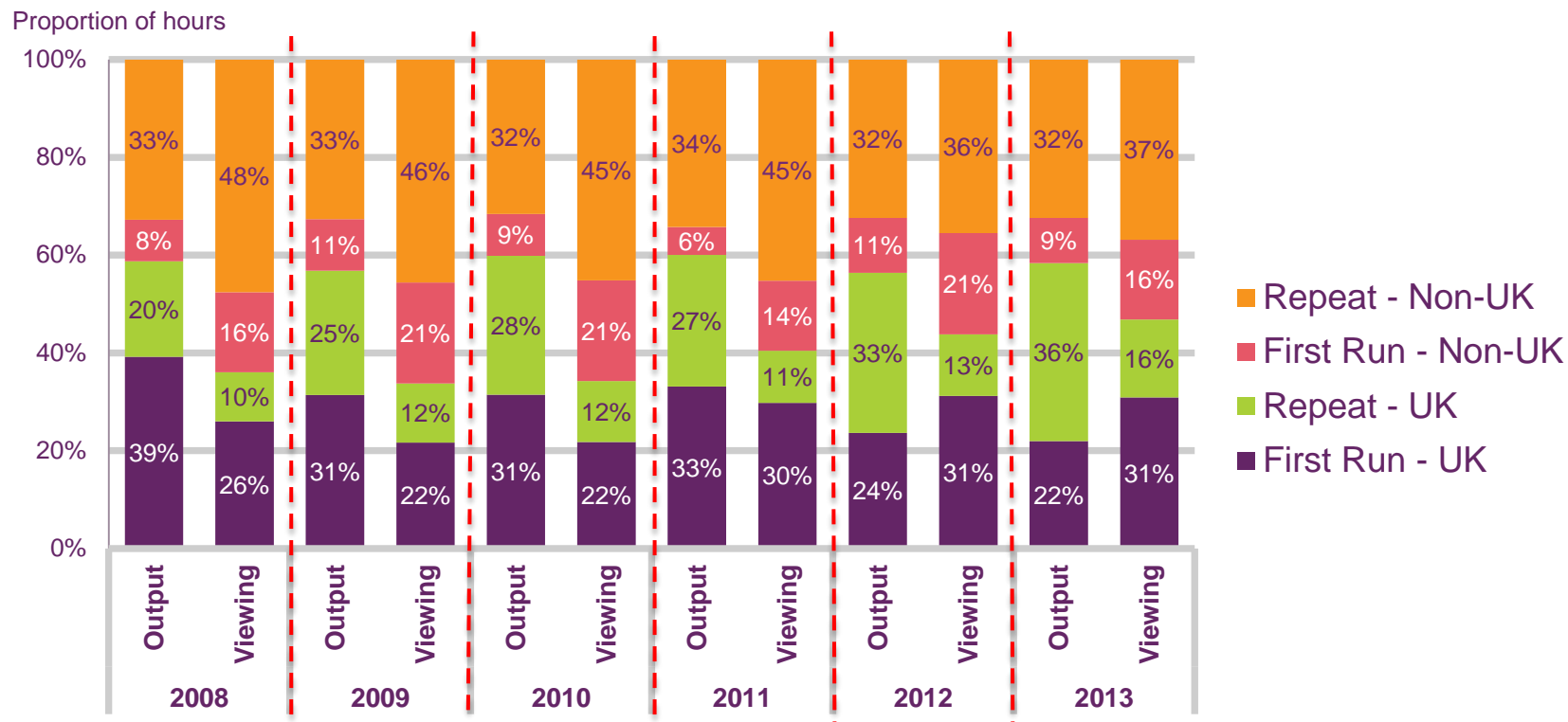
## Summary – Channel 5



- Of the main five PSB channels Channel 5 places the strongest emphasis on non-UK content across its schedules. While absolute hours to non-UK first-run and repeats output has fallen (3,282 hours in 2008 to 2,900 hours in 2013) they constituted the same proportions of the channel's schedule in both years (41% in 2008 and 2013) and is also constant across each year between 2008-2013.
- First-run UK content has increased its volume of viewing in absolute terms compared to 2013, but the schedules now include a far higher proportion of UK repeats: in 2008, 39% of output (3,121 hours) was UK first-run content, and 20% (1,558 hours) of repeats. In 2013 this was almost reversed, with 22% (1,532 hours) UK first-run, and 36% (2,533 hours) UK repeats. Despite the change of emphasis to UK repeats, as a proportion of viewing UK first-run content continued to attract the higher share of viewing hours; 31% of viewing in 2013 and 26% in 2008. UK repeats accounted for 10% of viewing in 2008 and 16% of viewing in 2013 (Figure 11).
- In peak time, Channel 5's schedule has the lowest proportion of UK first-run content of the main PSBs. Under half of all airtime on the channel is made up of UK first-run content during the peak day part across all years (an average of 40% across the analysis period). A comparison of the proportion of output hours and the resulting proportion of viewing hours generated by such content gives an indication of the efficiency of the type of programming. Between 2008-2010 the viewing share of UK first-run content was consistently lower than the output share (Figure 12). For example 42% of output in 2008 yielded 32% of all viewing to Channel 5 in peak time and in 2011 46% of output generated 41% of viewing. From 2012 the proportion of UK first-run output generated a higher proportion of viewing for the first time which was sustained in 2013. While output stayed constant at 41%, in 2012 and 2013, viewing increased from 42% to 43%.
- The proportion of first-run non-UK content in peak time increased 4pp from 12% (202 hours) in 2008 to 16% (265 hours) in 2013 and generated an additional 2pp of viewing (21% to 23%). The proportion of non-UK repeats has decreased from 35% of output in 2008 to 27% of output in 2013. The impact of this reduction has been greater on the viewing generated to such content – falling by almost half from 40% of viewing to 24% of viewing in 2013.

# Figure 11

## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: Channel 5, all day

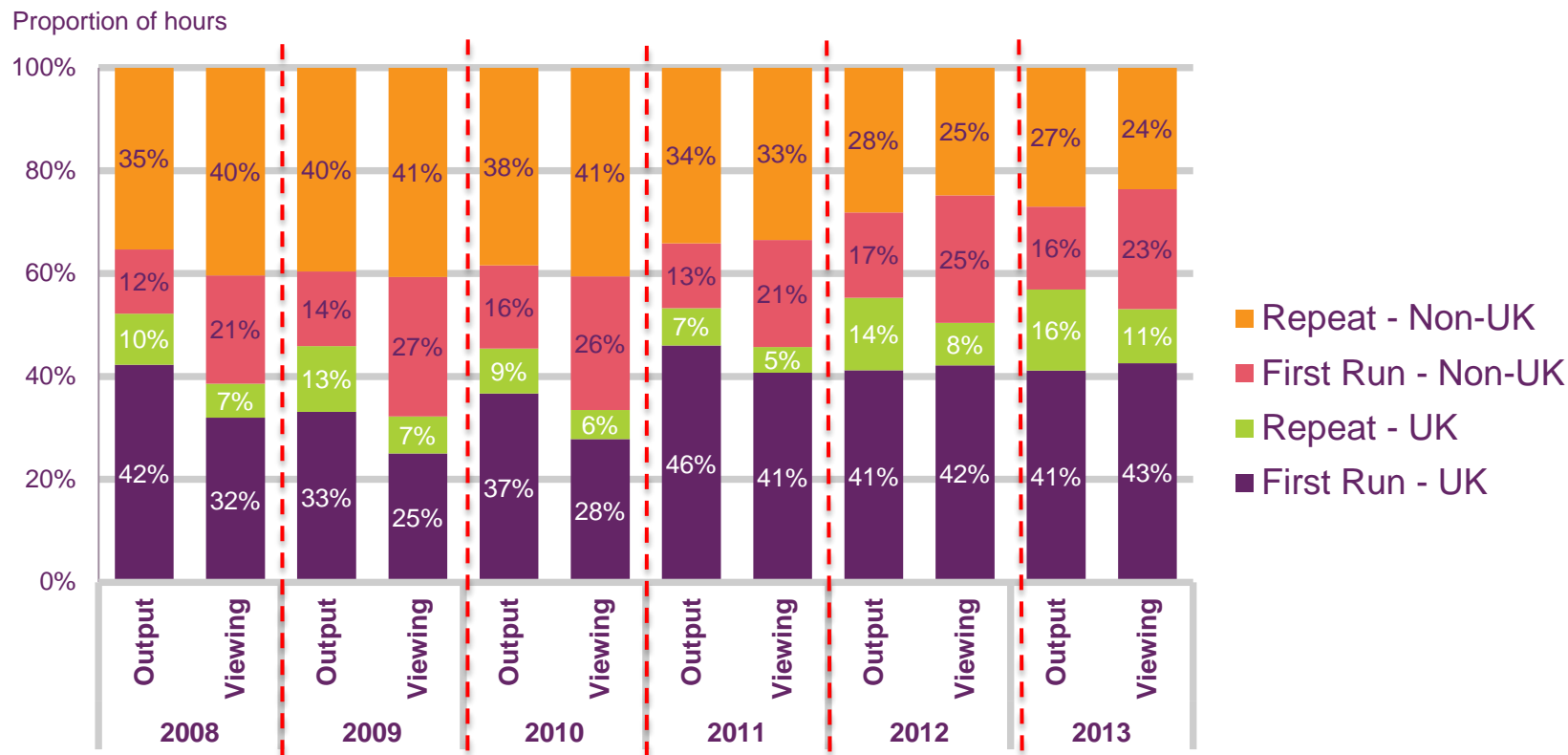


Output Hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	674	833	682	432	774	642
First Run - UK	3121	2491	2508	2517	1632	1532
Repeat - Non-UK	2608	2591	2522	2606	2235	2258
Repeat - UK	1558	2018	2267	2048	2261	2533
<b>Grand total</b>	<b>7961</b>	<b>7933</b>	<b>7978</b>	<b>7601</b>	<b>6902</b>	<b>6964</b>

Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, all day. Main five PSBs = BBC One, BBC Two, ITV, Channel 4 and Channel 5 including HD channel variants but excluding +1s.

# Figure 12

## Proportion of output and viewer hours by first-run and repeats, UK and non-UK: Channel 5, peak time



Output hours	2008	2009	2010	2011	2012	2013
First Run - Non-UK	202	237	267	207	278	265
First Run - UK	682	542	605	750	691	676
Repeat - Non-UK	570	649	634	555	472	441
Repeat - UK	160	210	144	119	237	262
<b>Grand Total</b>	<b>1614</b>	<b>1638</b>	<b>1650</b>	<b>1631</b>	<b>1677</b>	<b>1643</b>

Source: BARB/Attentional. Repeat and country of origin fields, Individuals 4+, Network, peak time (6pm – 10:30pm). Main five PSBs = BBC One, BBC Two, ITV, Channel 4 and Channel 5 including HD channel variants but excluding +1s.