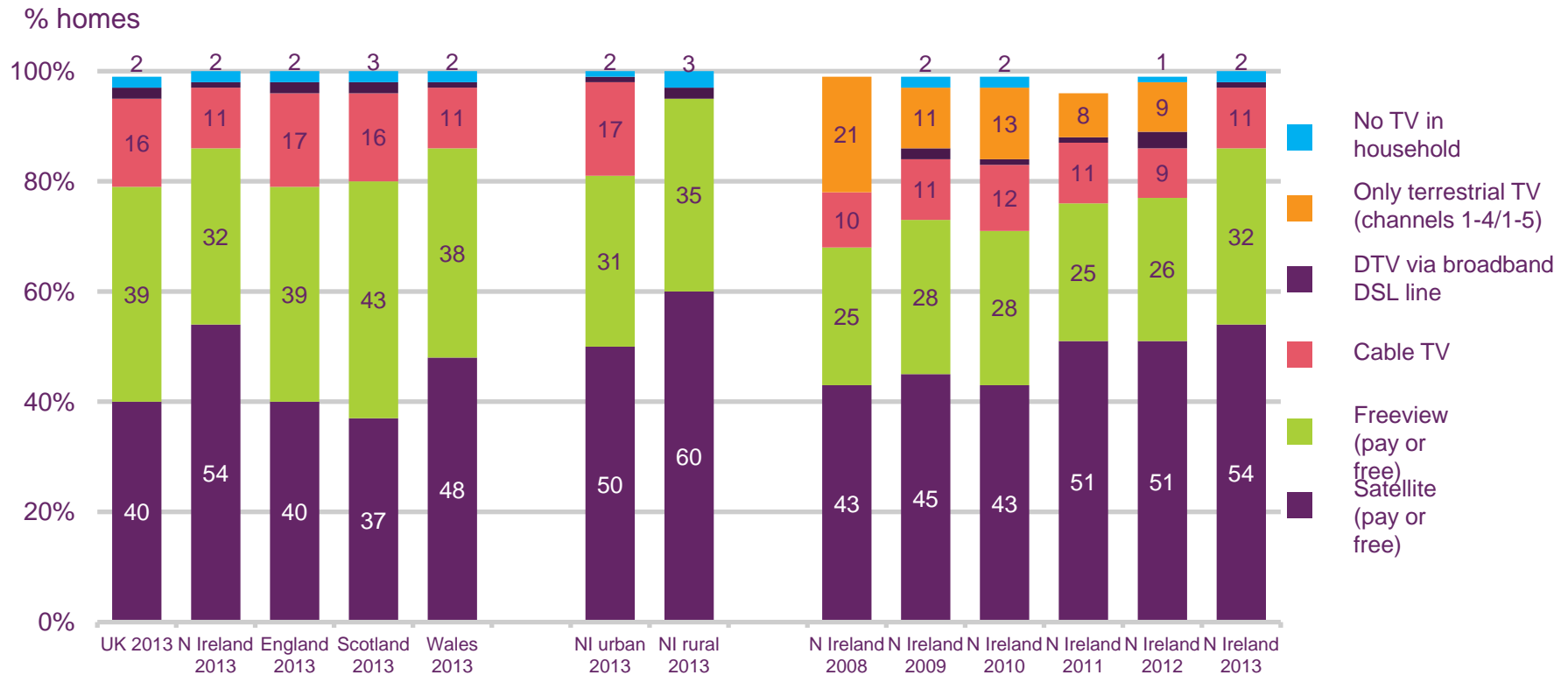


Figure 2.1 Main TV set share by platform

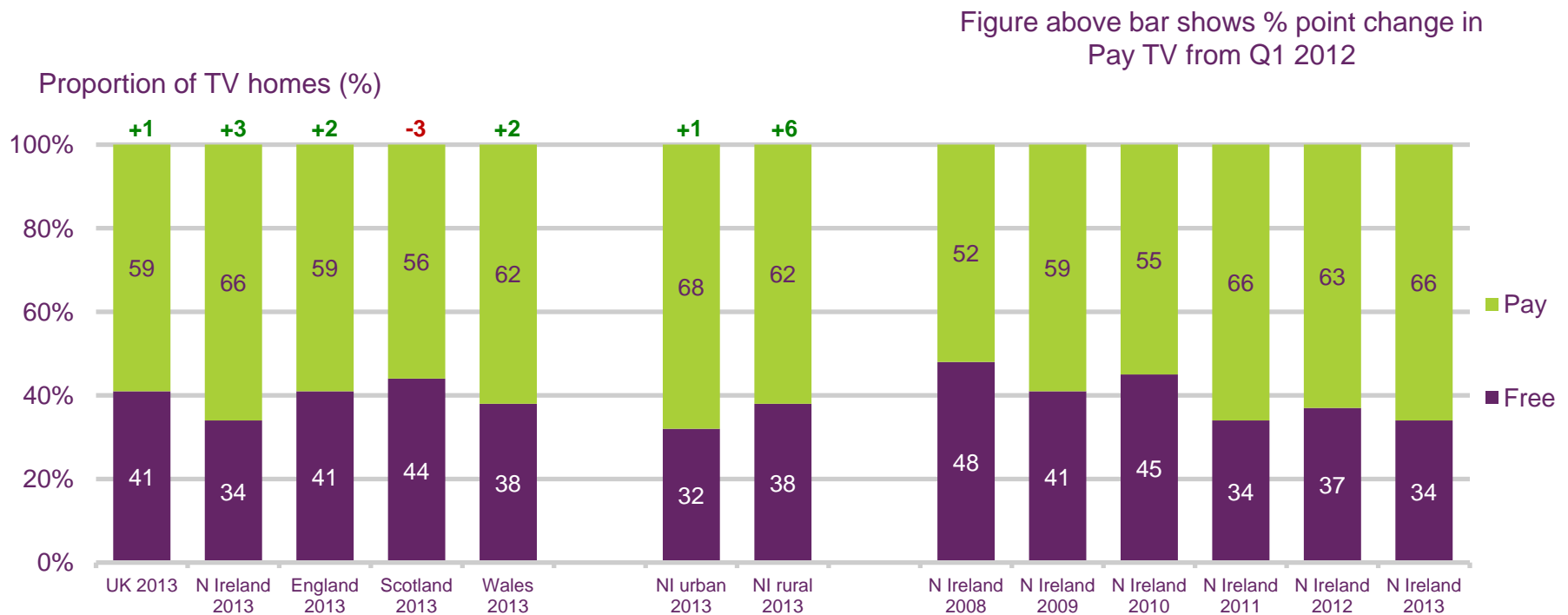


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Figure 2.2 Proportion of TV homes with free and pay 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, 492 Northern Ireland, 2197 England, 487 Scotland, 485 Wales, 248 Northern Ireland urban, 244 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 492 Northern Ireland 2013)

Figure 2.3 Proportion of homes with HD television

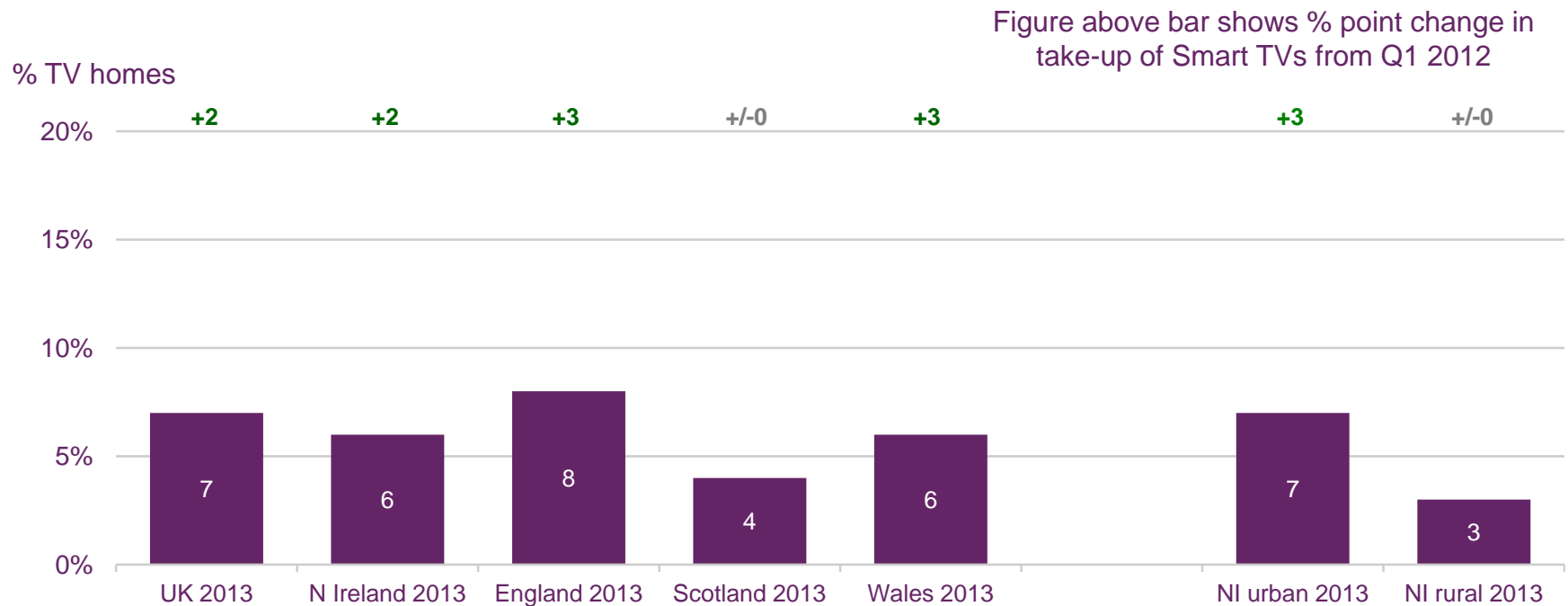


QH53. Is the main TV in your household an HDTV set or HD ready?/ QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural)

Figure 2.4 Smart TV take-up in Northern Ireland

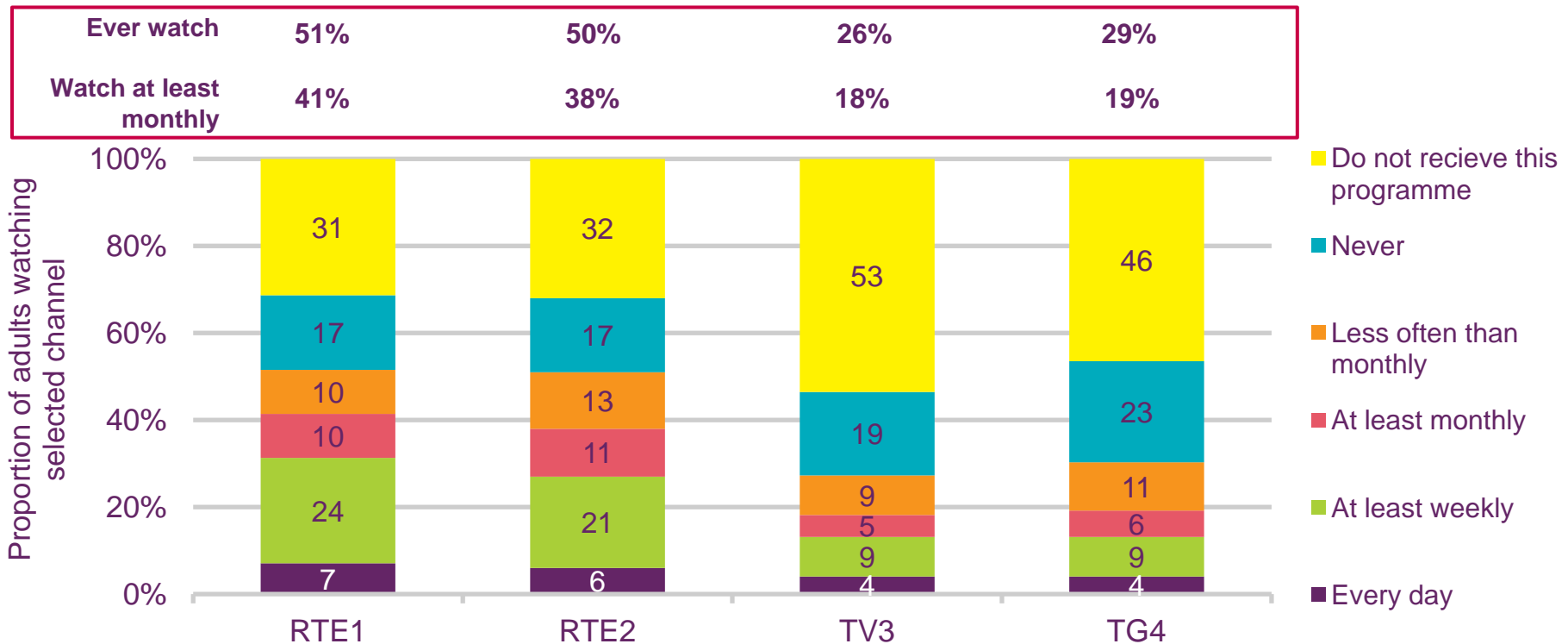


QH18. Are any of your TV sets “Smart TVs”? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ with a TV in household (n = 3661 UK, 492 Northern Ireland, 2197 England, 487 Scotland, 485 Wales, 248 Northern Ireland urban, 244 Northern Ireland rural)

Figure 2.5 Claimed viewing of RoI originated TV channels in Northern Ireland



QH18/19. Which of these TV channels can you receive on your television/ How frequently, if at all, do you watch each of these channels?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ in Northern Ireland with a TV in household (n = 492)

Figure 2.6 Average hours of daily TV viewing, by nation: 2012

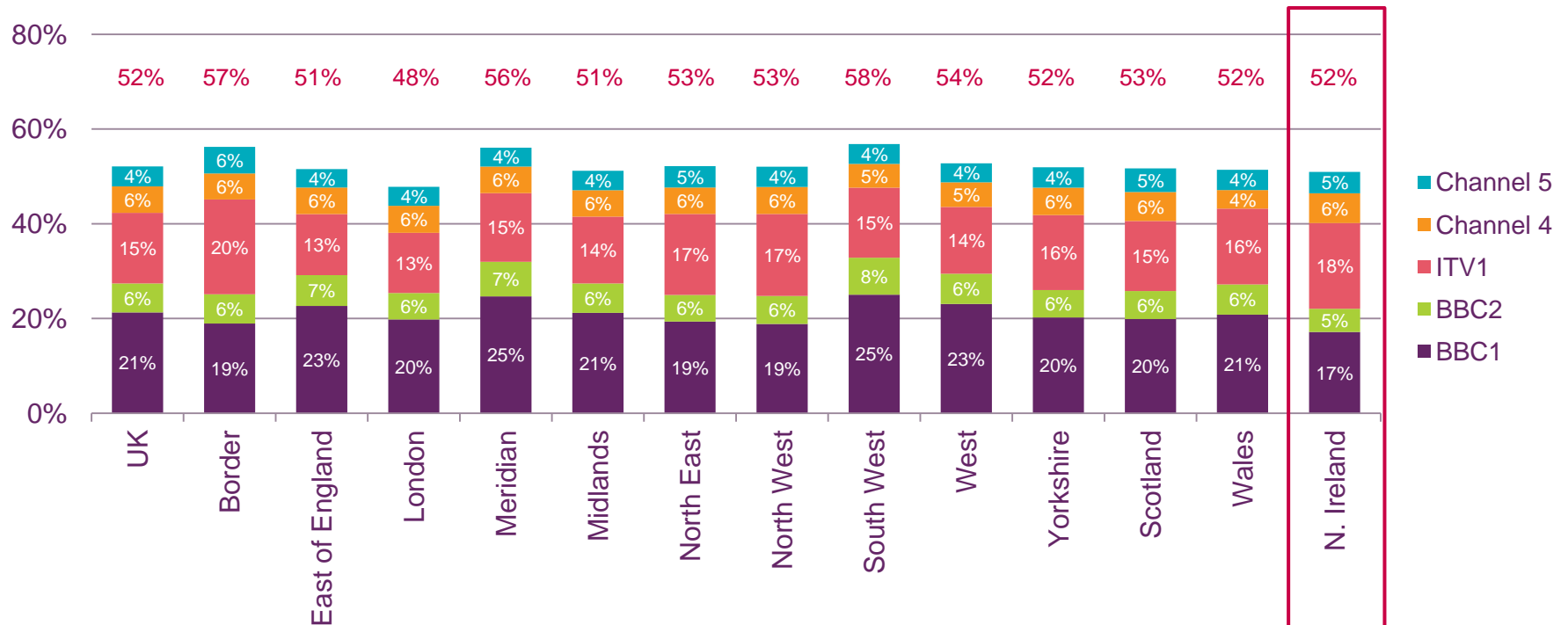
Hours per person per day



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.**

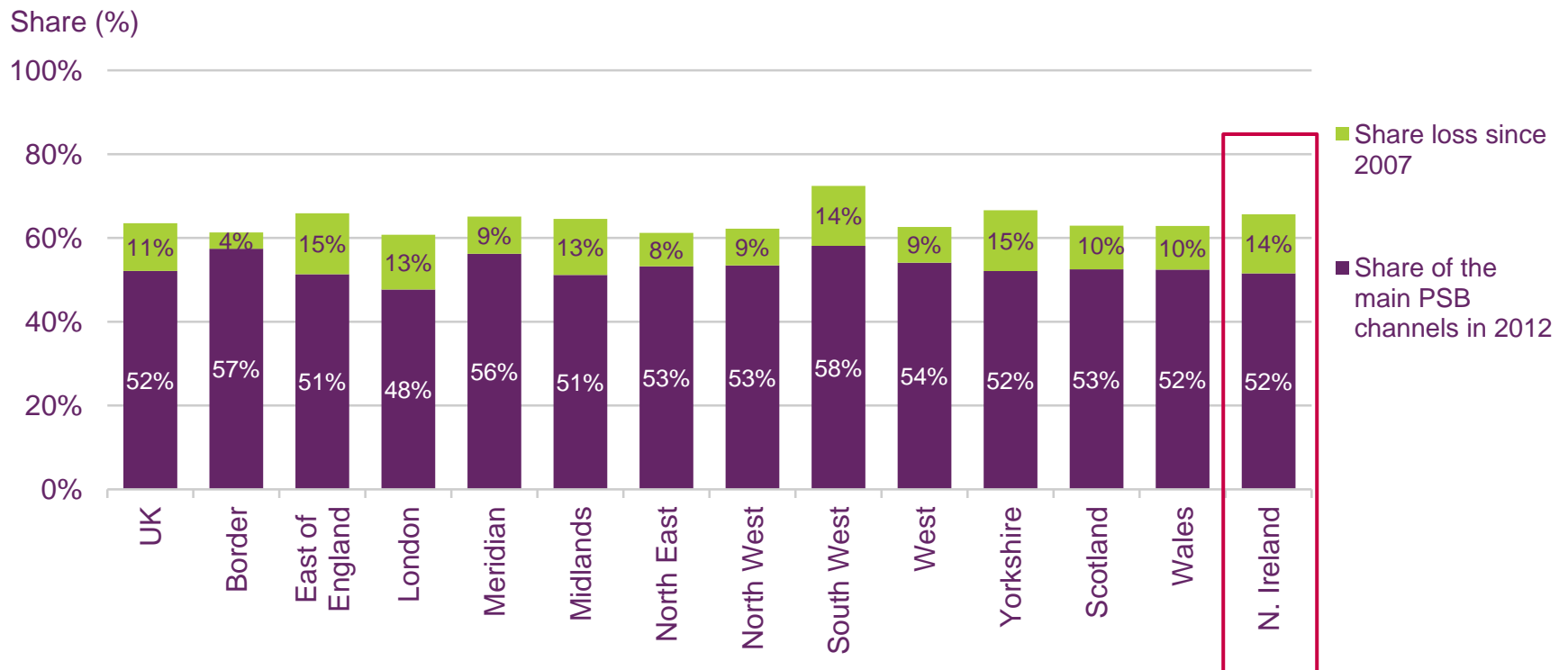
Figure 2.7 Share of the five main PSB channels in all homes: 2012

Audience share (%)



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

Figure 2.8 Reduction in combined share of the five main PSB channels, all homes: 2007 & 2012



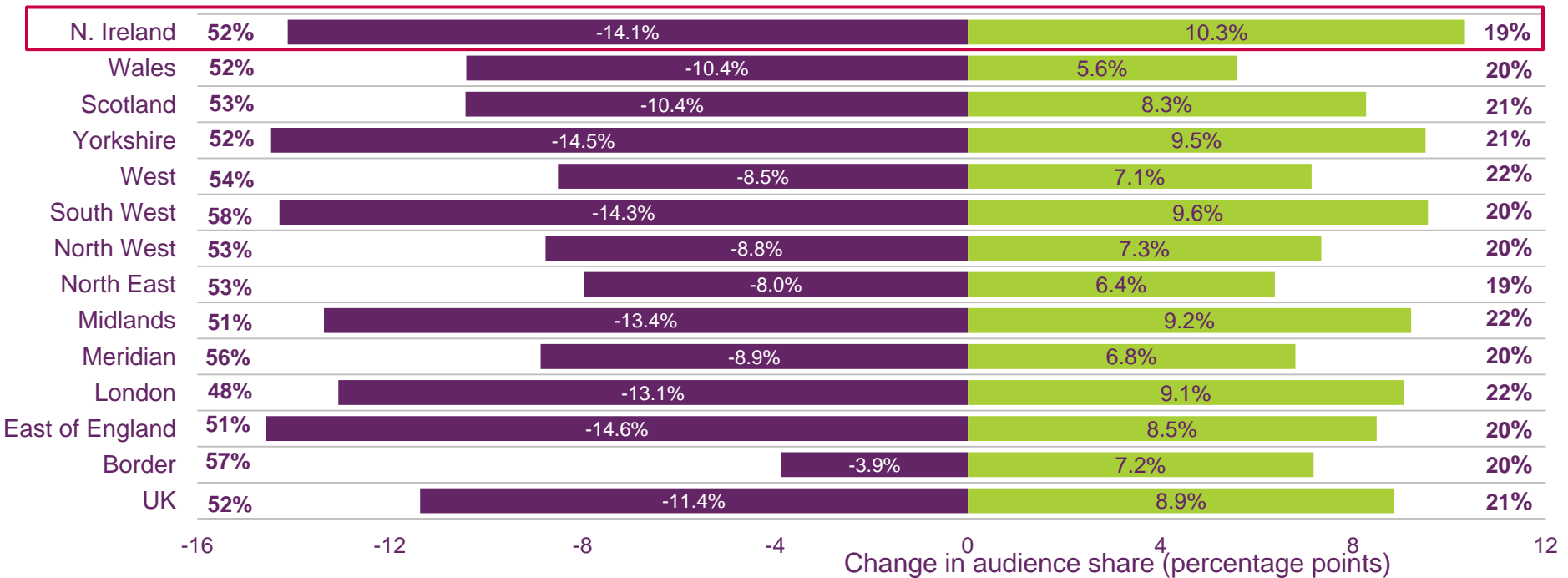
Source: BARB, all individuals (4+). HD channel variants are included.

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

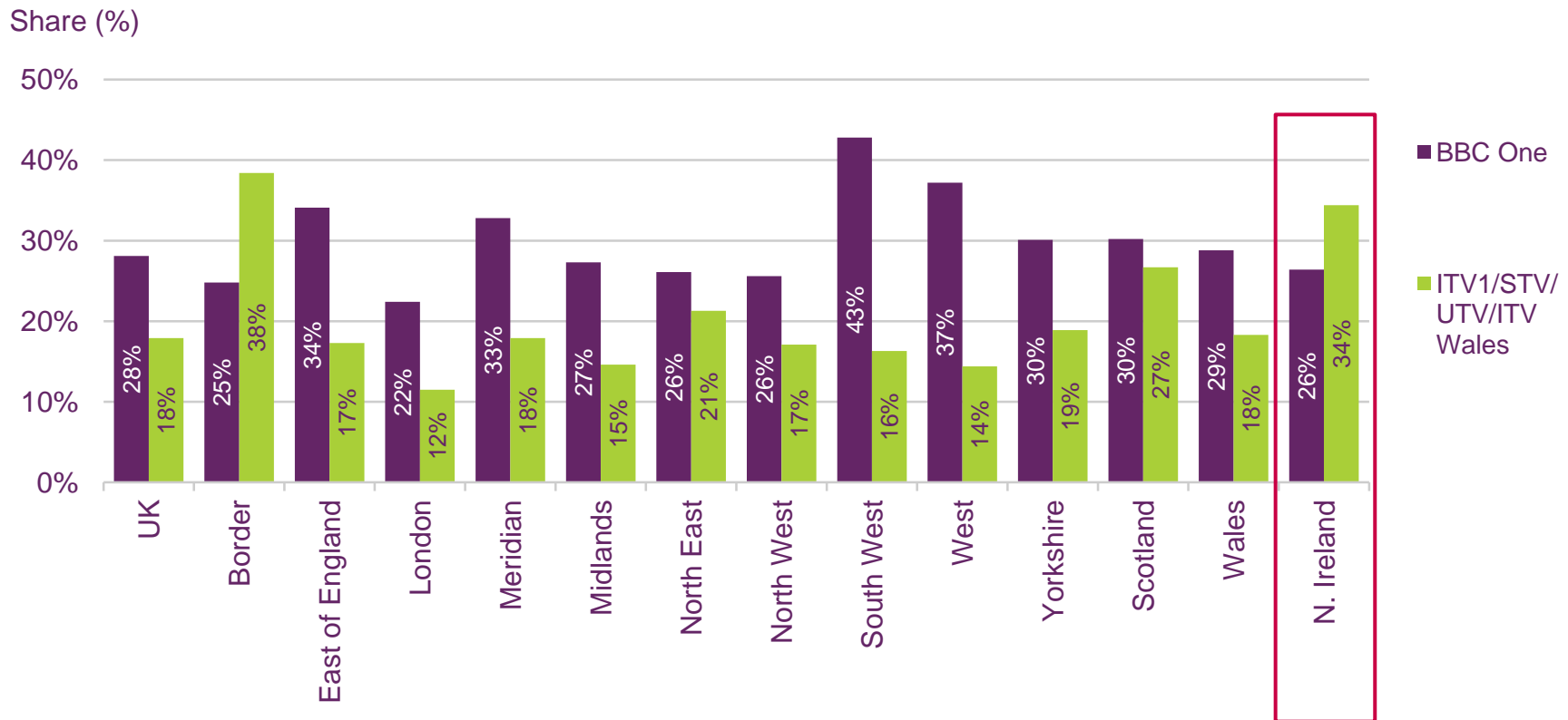
■ Change in total share of five main PSB channels since 2007 ■ Change in total share of the PSB portfolio channels since 2007



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

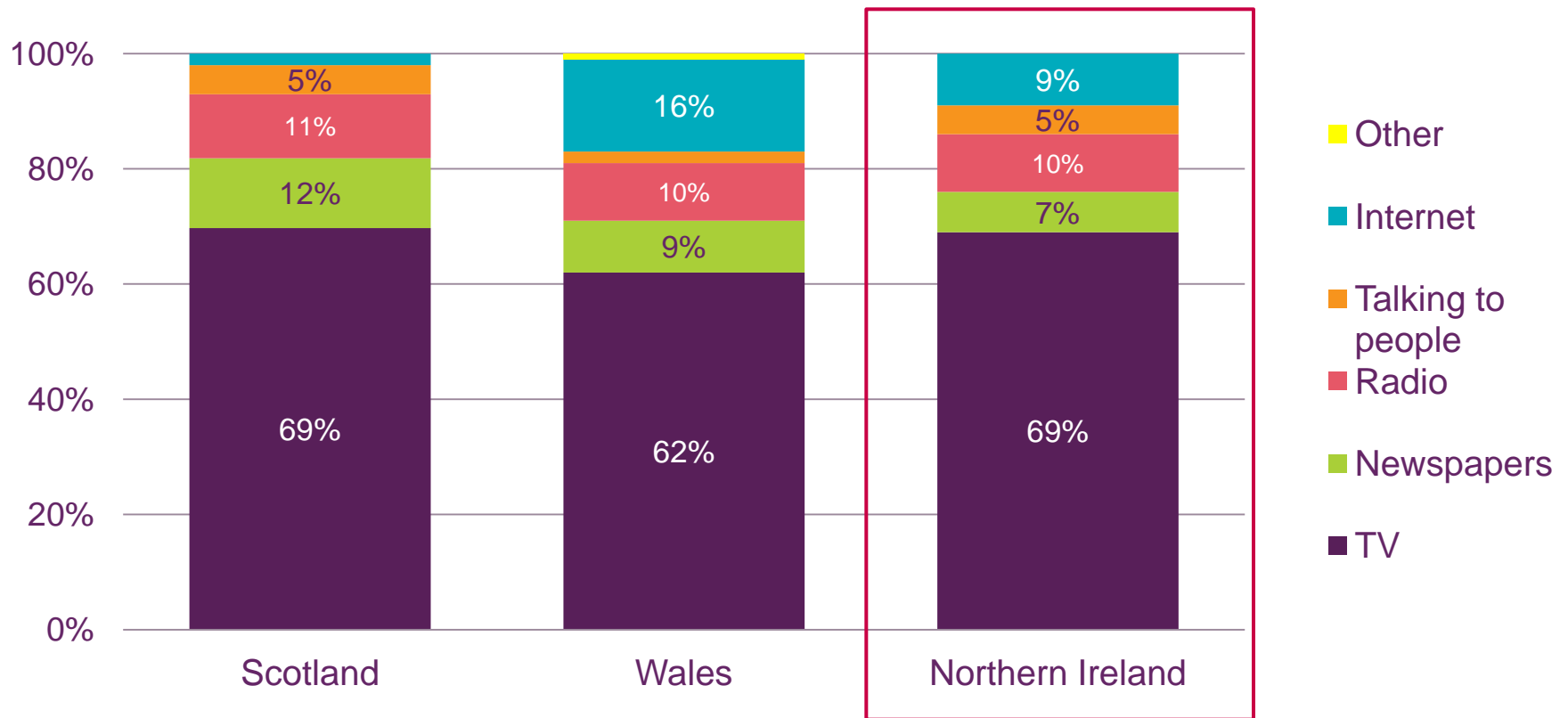


Source: BARB, all individuals (4+)

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 2.11 Main sources of Nations news for each nation

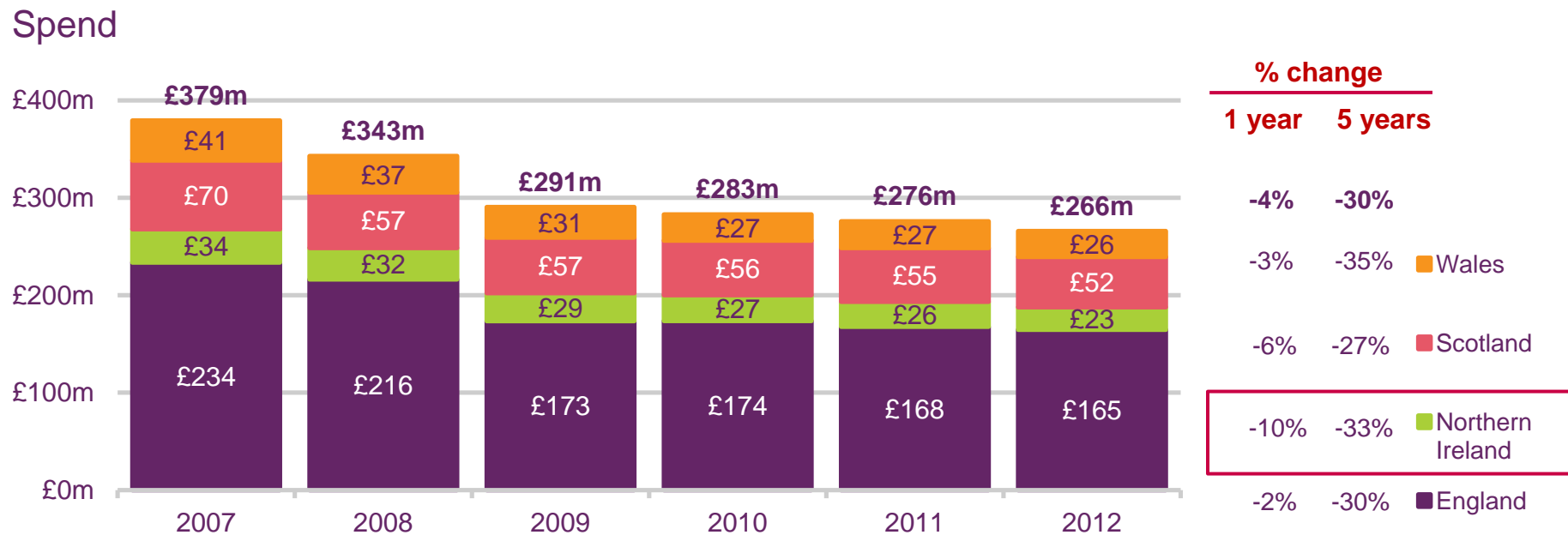
‘Can you tell me what, if anything, is your **main** source of news about what is going on in [Scotland, Wales, Northern Ireland]?’



Source: Ofcom Media tracker.

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

Figure 2.12 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 2.13 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	

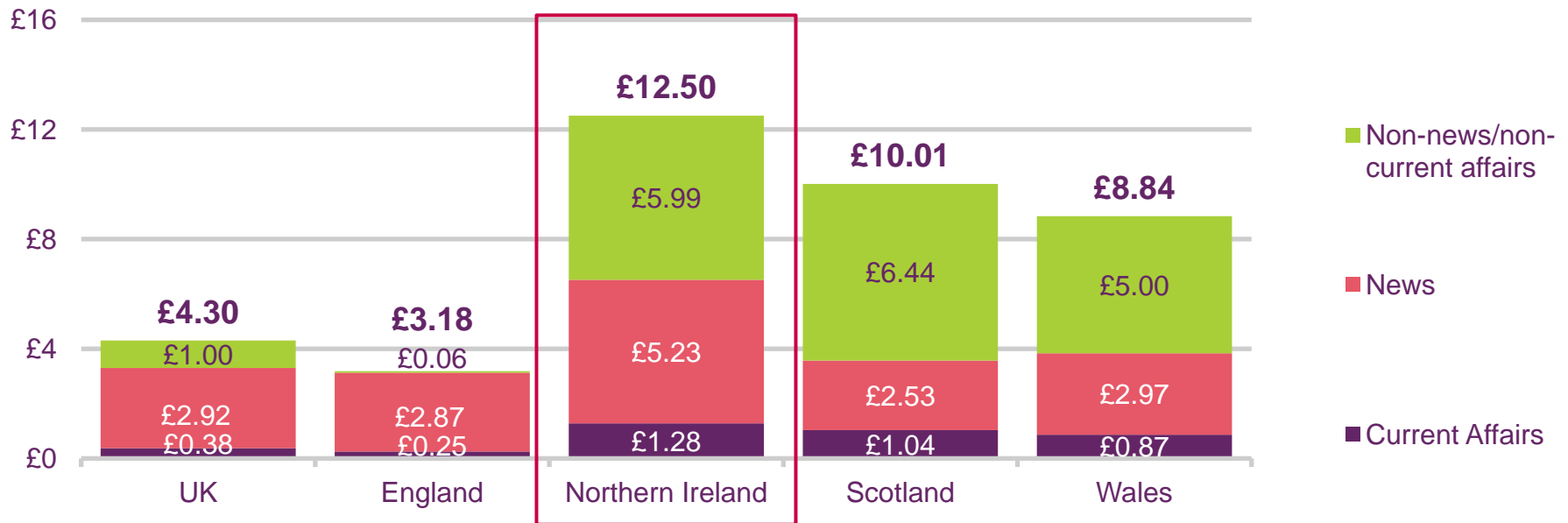
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	-4%	-29%	-2%	-28%	-10%	-33%	-7%	-26%	-2%	-34%

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

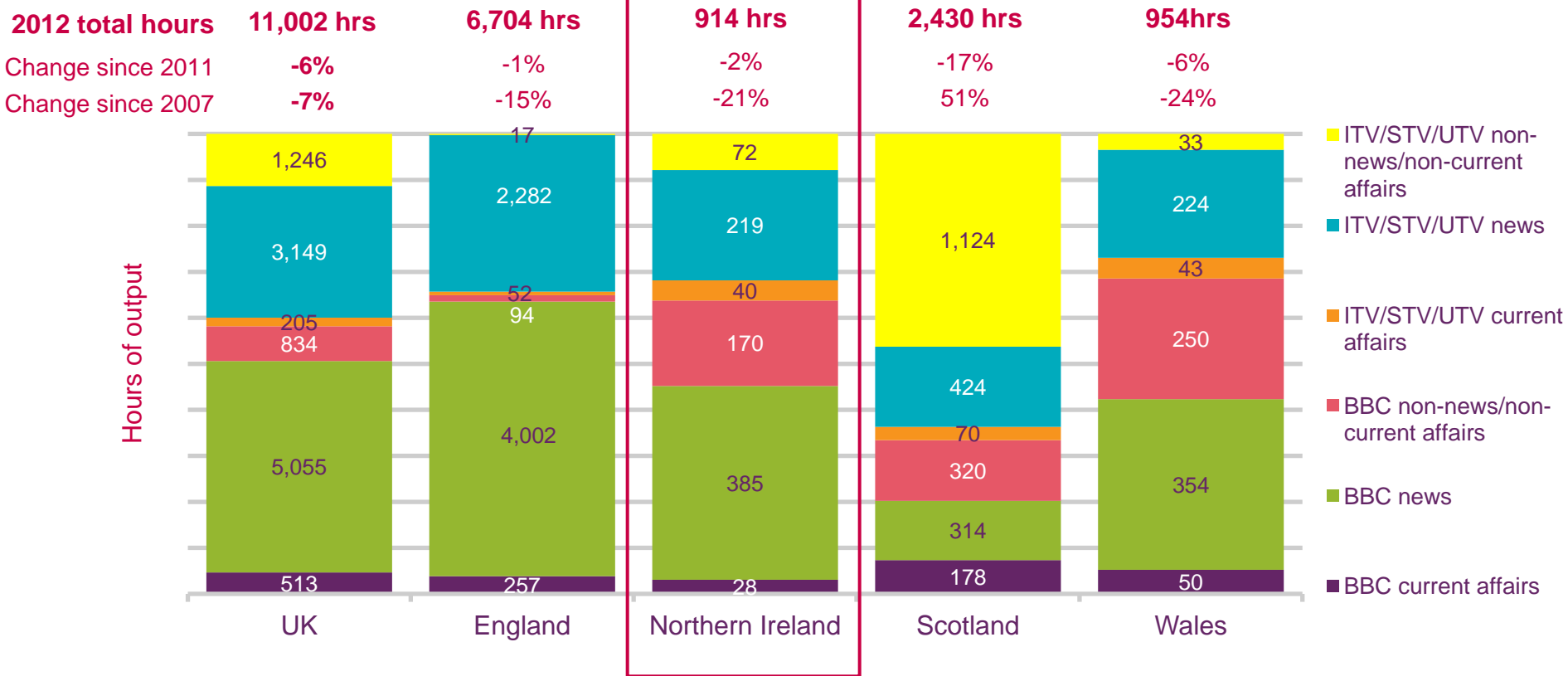
Spend per head



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.

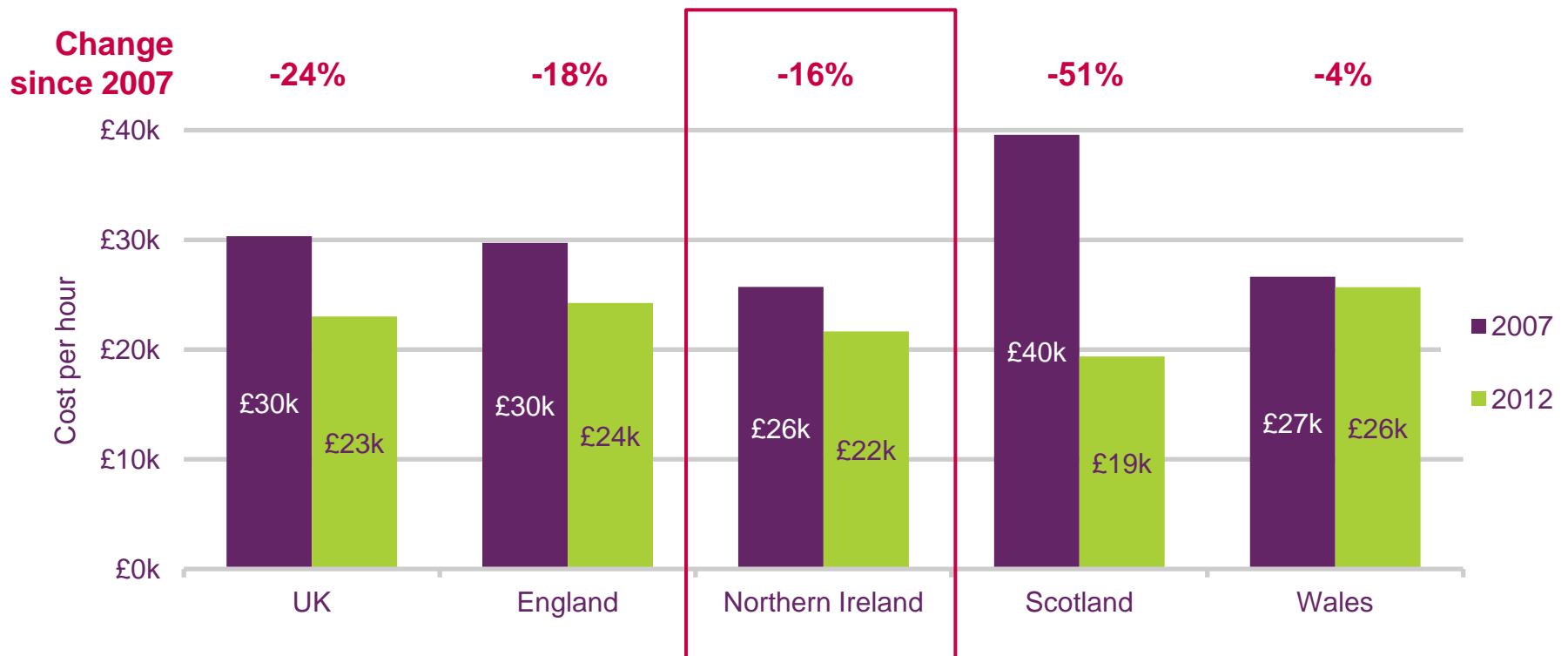
Figure 2.15 First-run originated hours of nations/regions output, by genre and broadcaster: 2012



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

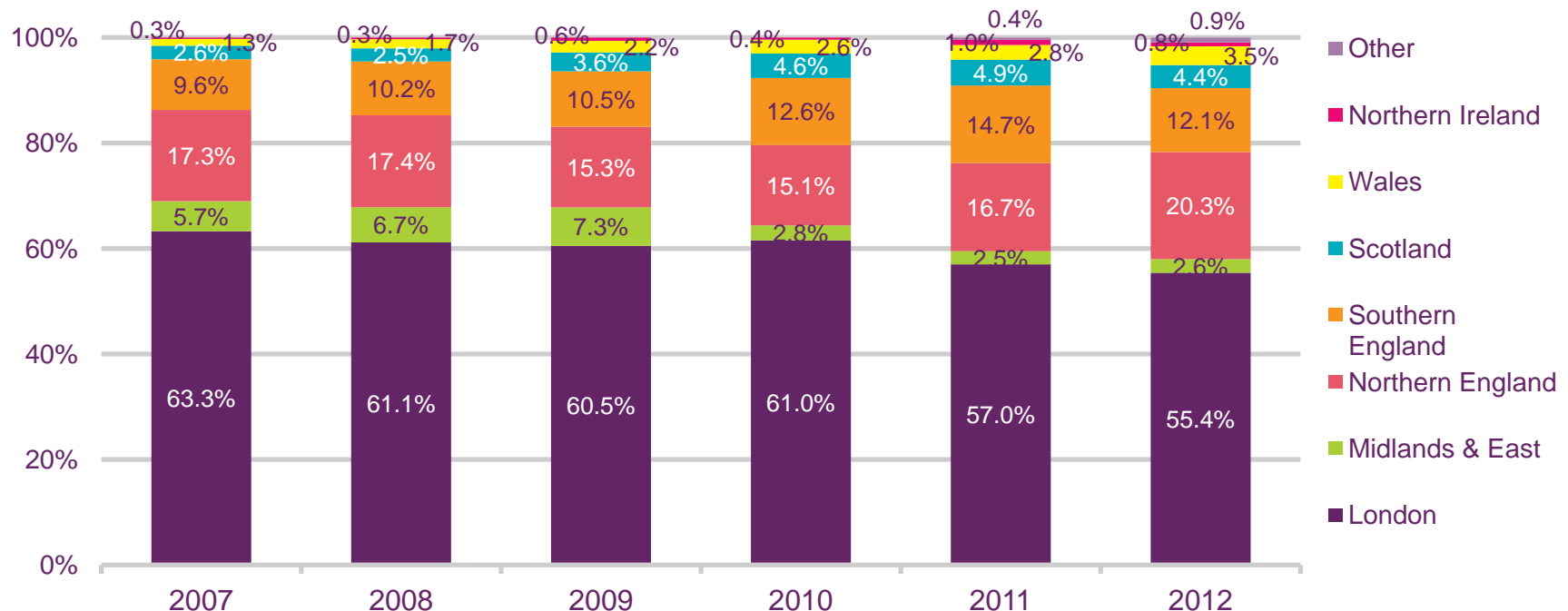


Source: Broadcasters. All figures expressed in 2012 prices.

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 2.17 Expenditure on out-of-London production: 2007 – 2012

Percentage of production by value

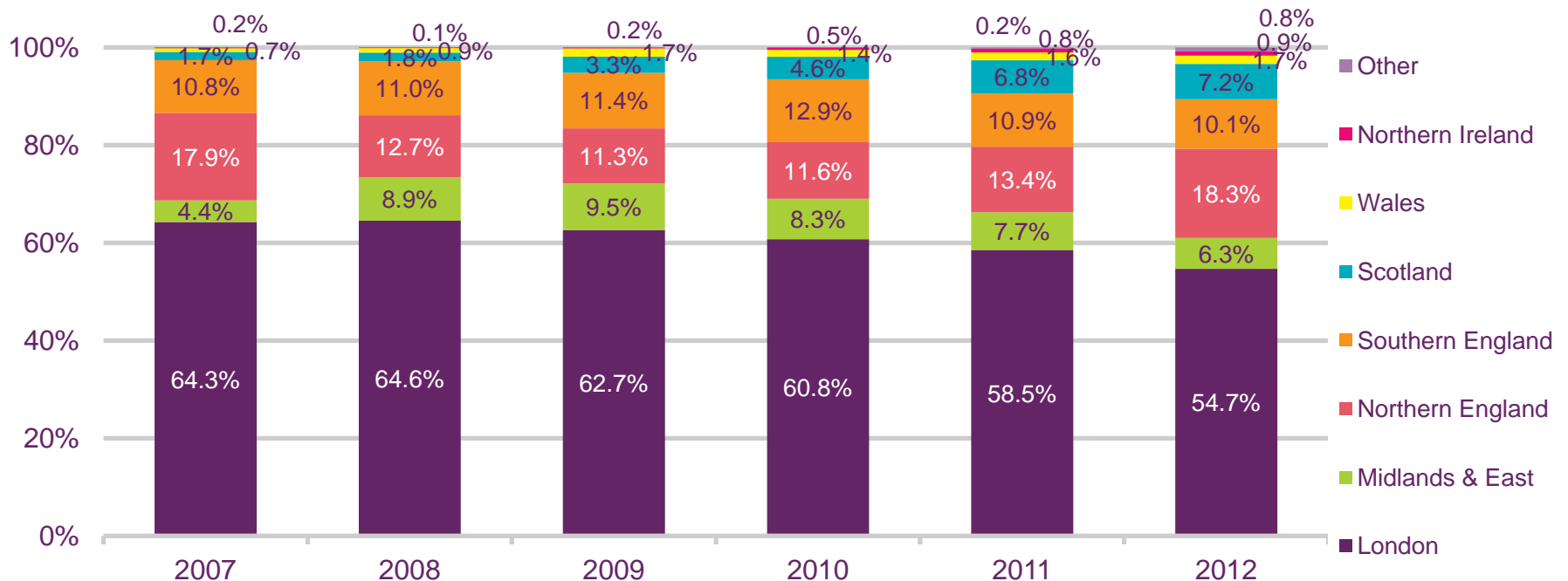


Source: Ofcom/broadcasters

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 2.18 Volume of out-of-London production: 2007 – 2012

Percentage of production by volume

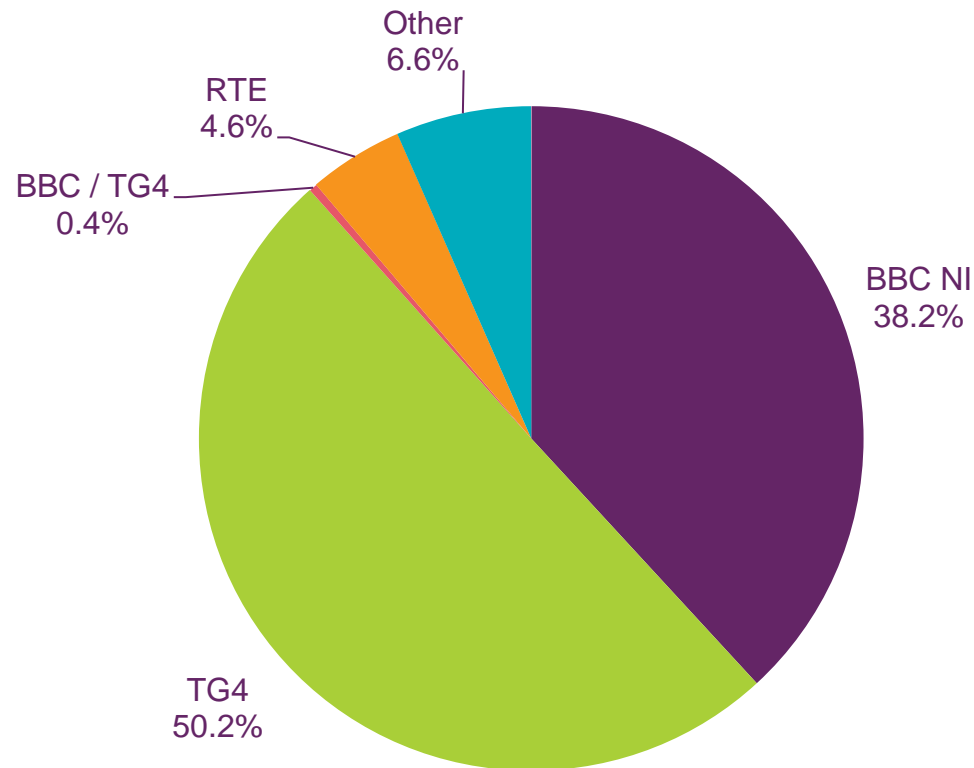


Source: Ofcom/broadcasters

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 2.19 Breakdown of output, by broadcaster: 2012/2013

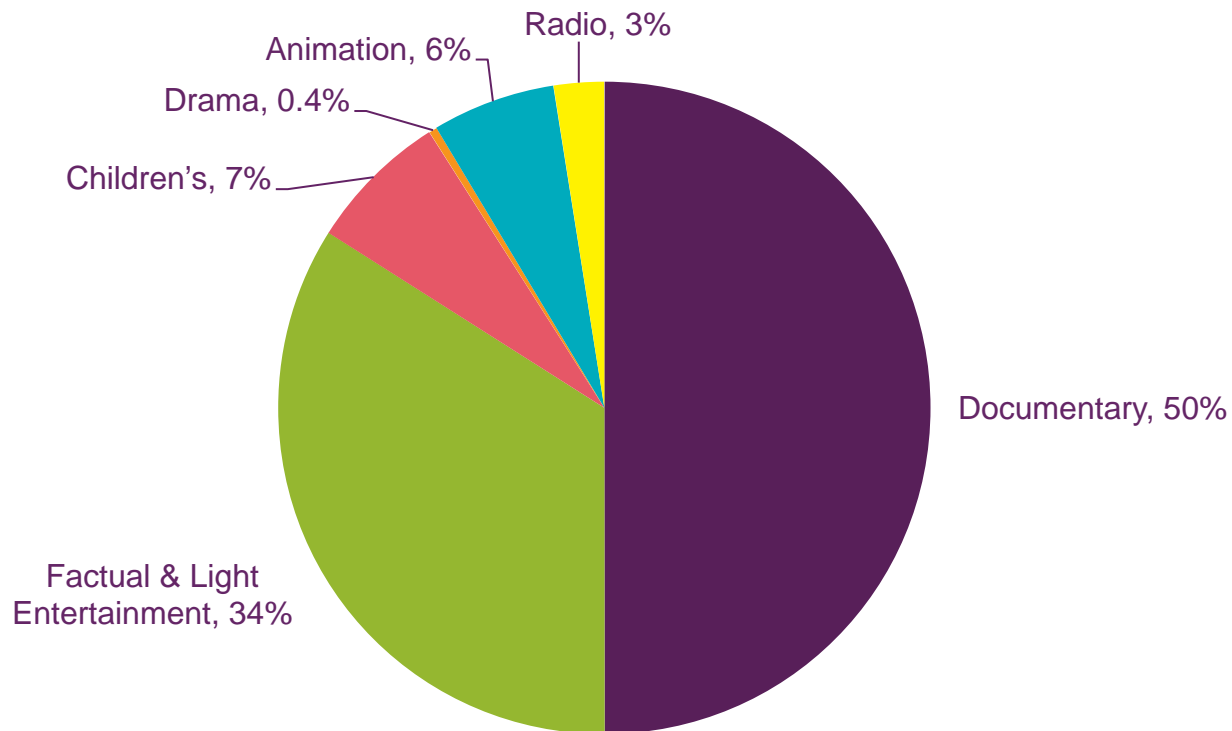
% breakdown of output by broadcaster 2012/2013



Source: ILBF. Includes all programmes

Figure 2.20 Spend by the ILBF on Irish language programming, 2012/13

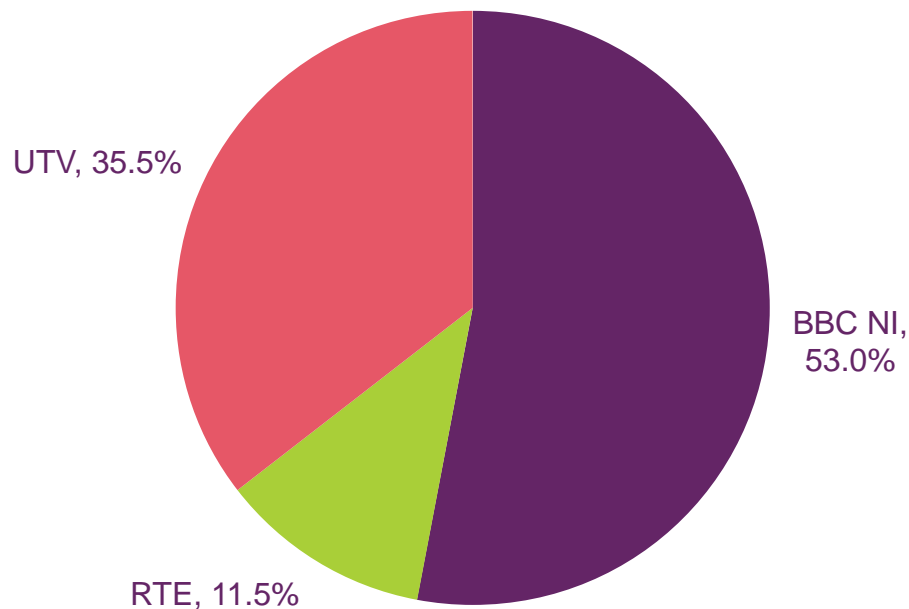
Proportion of spend for 2012/13



Source: ILBF. Includes all programmes

Figure 2.21 Breakdown of output, by broadcaster: 2012/2013

% breakdown of output by broadcaster 2012/13



Source: USBF. Includes all programmes