

Figure 2.1

Multiplex reception areas in Wales



Source: Ofcom Digital Switchover Factsheet 3 – Digital Terrestrial TV Coverage: Wales TV Region

Figure 2.2

Cumulative households switched in Wales, by transmitter group

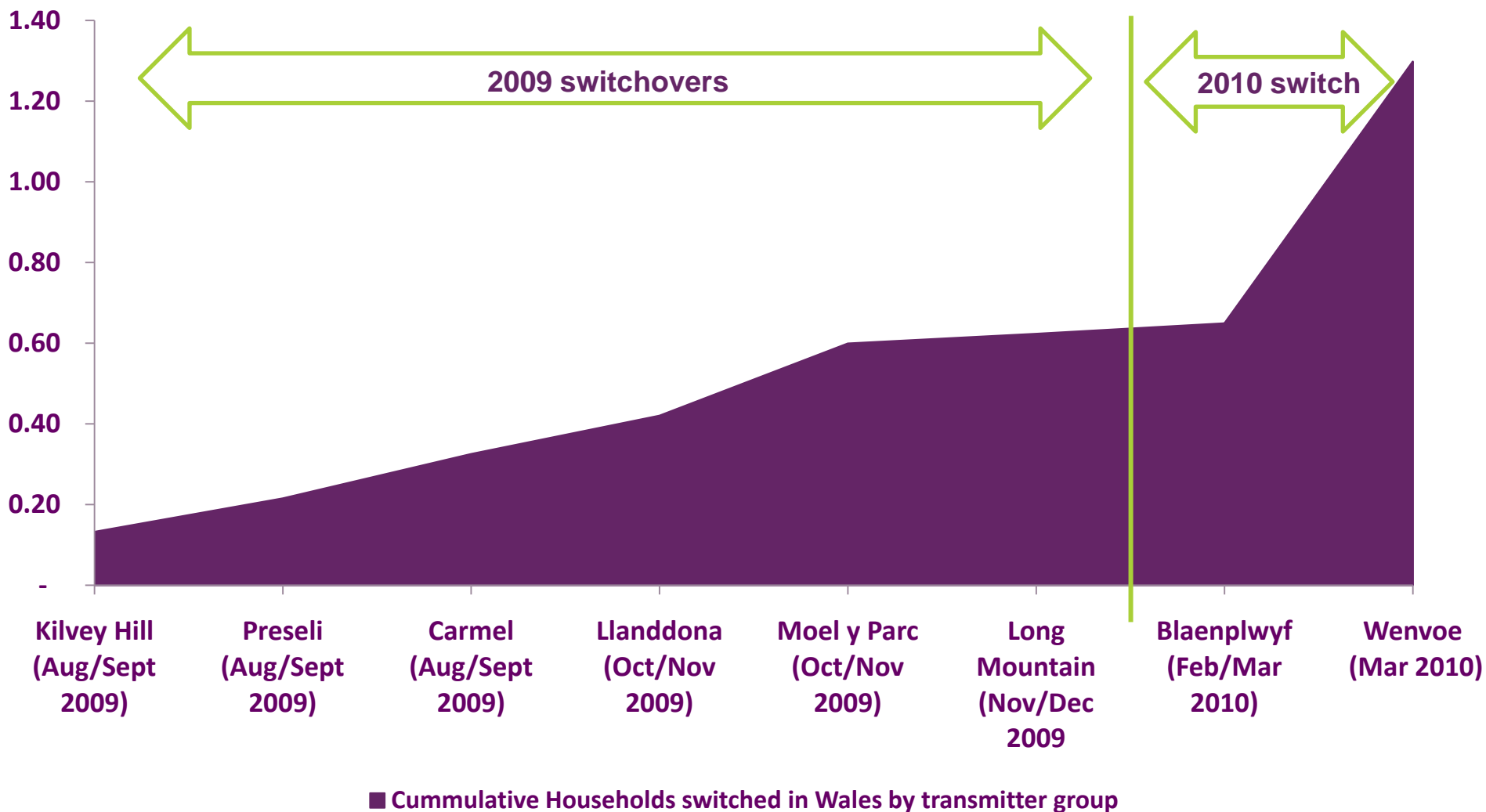
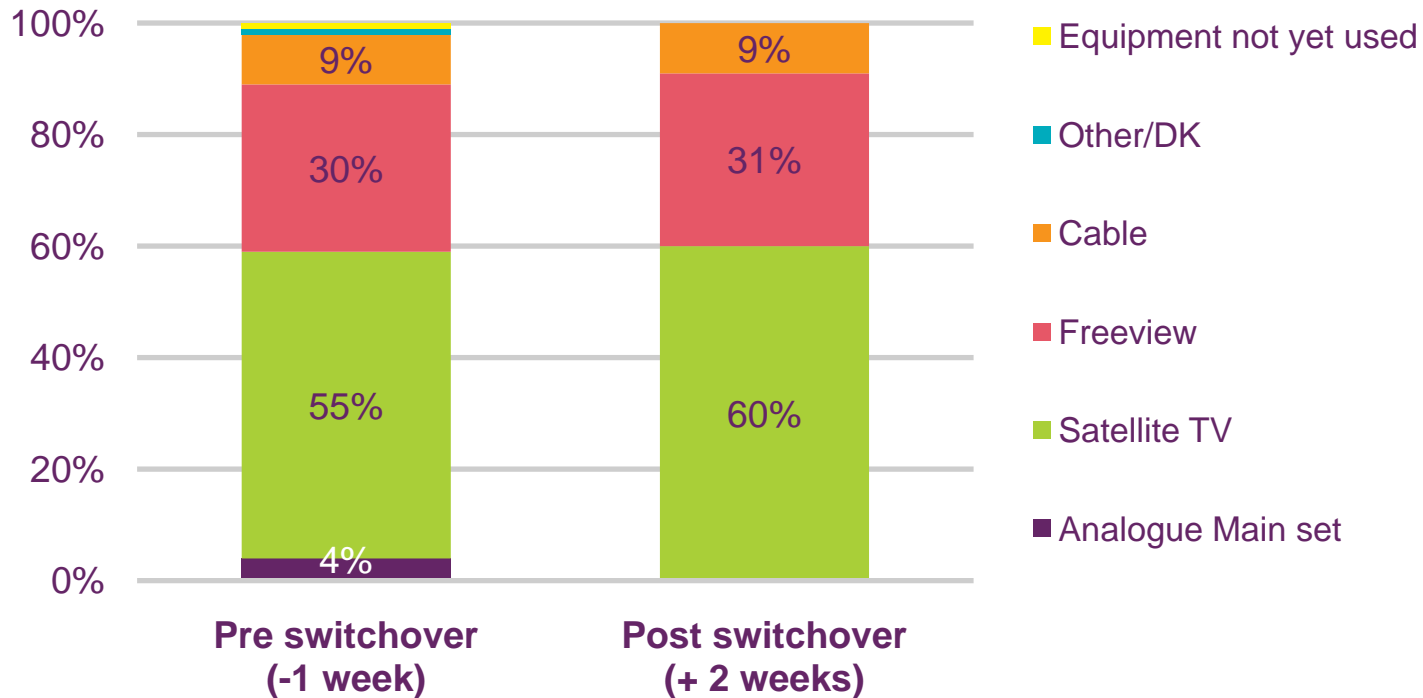


Figure 2.3

Wales main set conversion

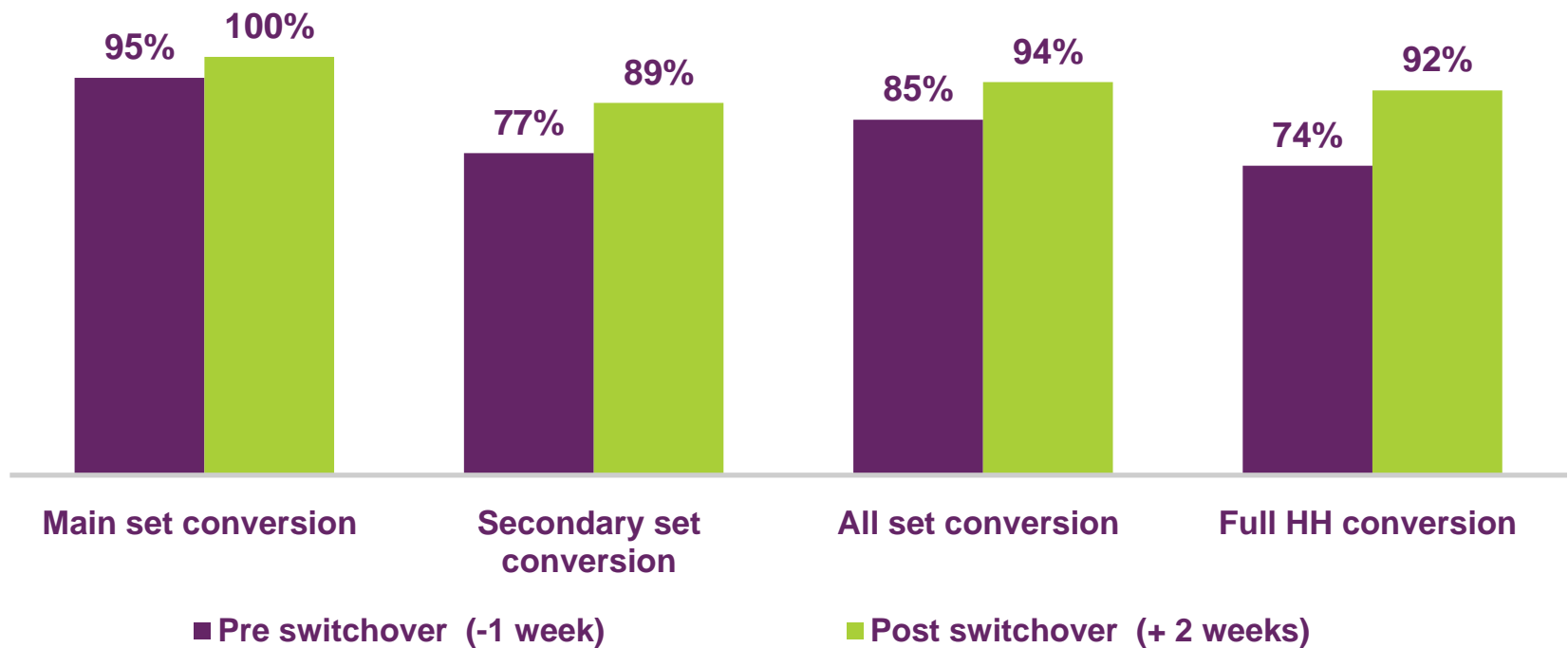
Main set platform take up



Digital UK Switchover Tracker pre and post switchover dip stick surveys

Figure 2.4

DTV conversion increases across Welsh homes

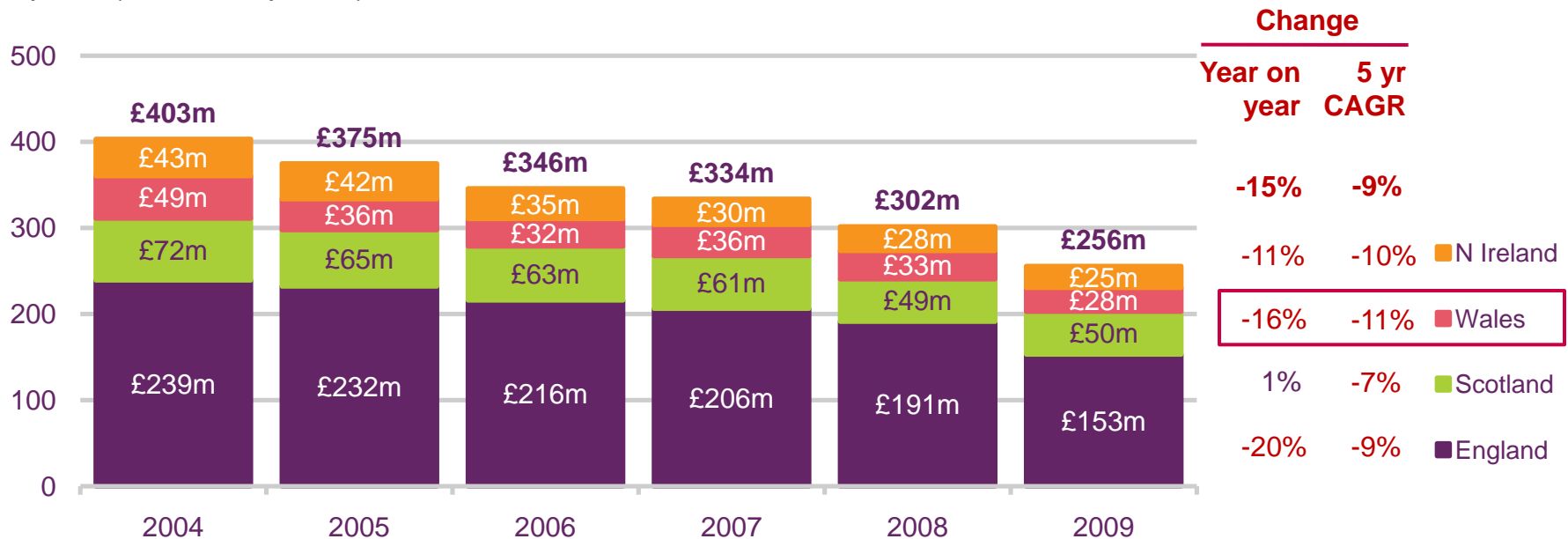


Digital UK Switchover Tracker pre and post switchover dip stick surveys

Figure 2.5

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

Spend (£m, 2009 prices)



Source: Broadcasters. All figures expressed in 2009 prices.

Note: The BBC changed the way it calculated its spend figures from 2005 onwards. The figures for 2002 – 2004 are based on cost per hour averages, while those for 2005 - 2008 are actual spend figures. Comparisons over the period 2003-2008 should therefore be made with caution. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

Figure 2.6

Spending on programmes for viewers in each nation

Change since 2004

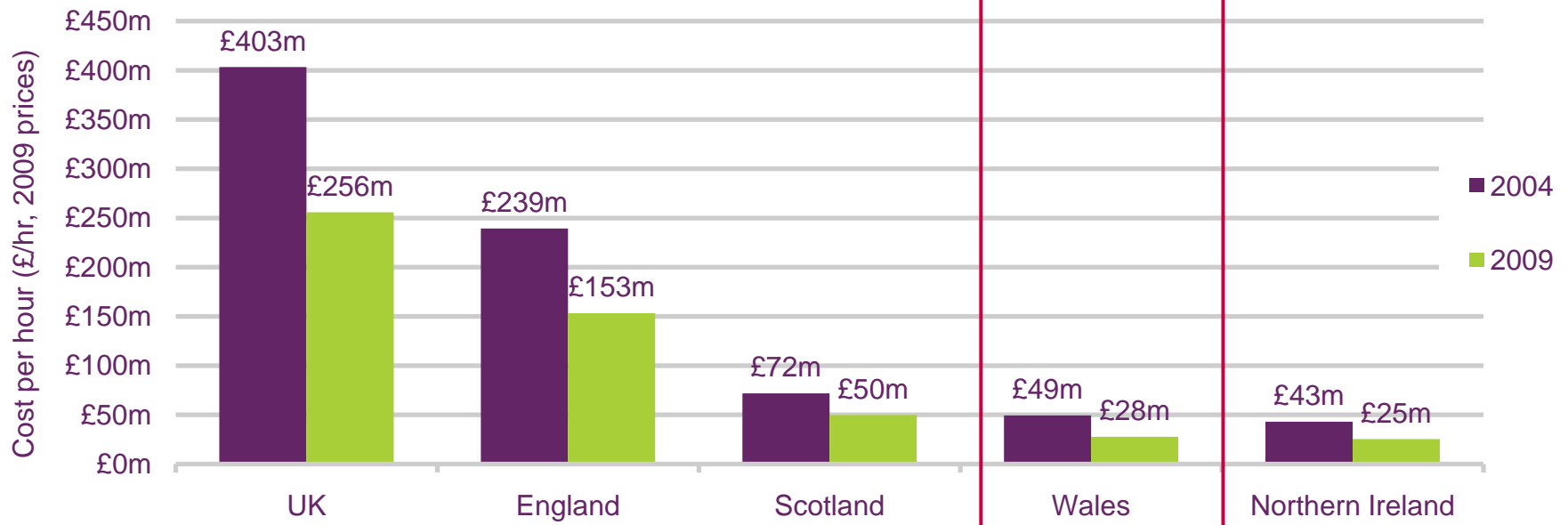
-36%

-36%

-31%

-44%

-41%

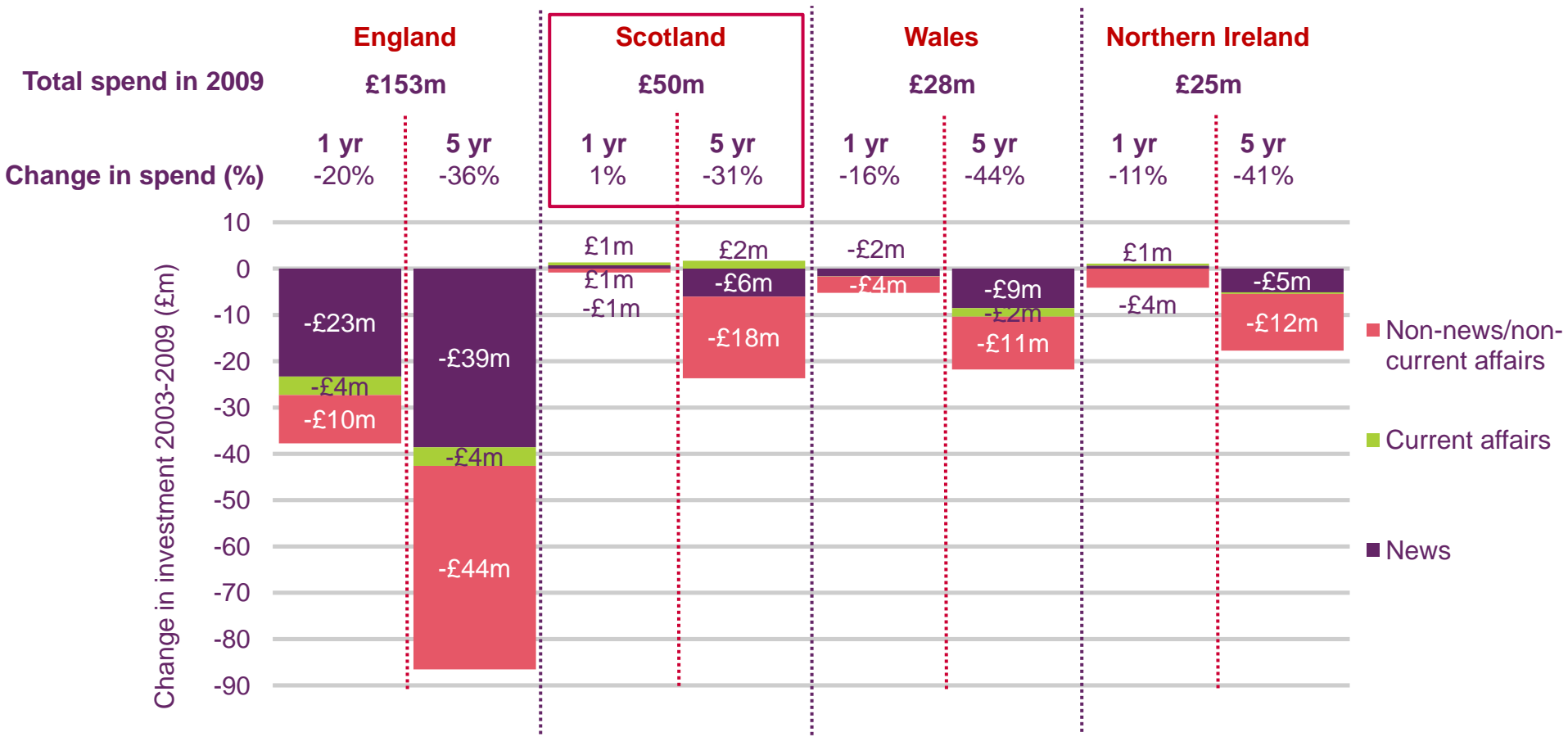


Source: Broadcasters. All figures expressed in 2009 prices.

Note: The BBC changed the way it calculated its spend figures from 2005 onwards. The figures for 2002 – 2004 are based on cost per hour averages, while those for 2005 - 2008 are actual spend figures. Comparisons over the period 2003-2008 should therefore be exercised with caution. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

Figure 2.7

Change in investment by genre and nation, 2004 - 2009



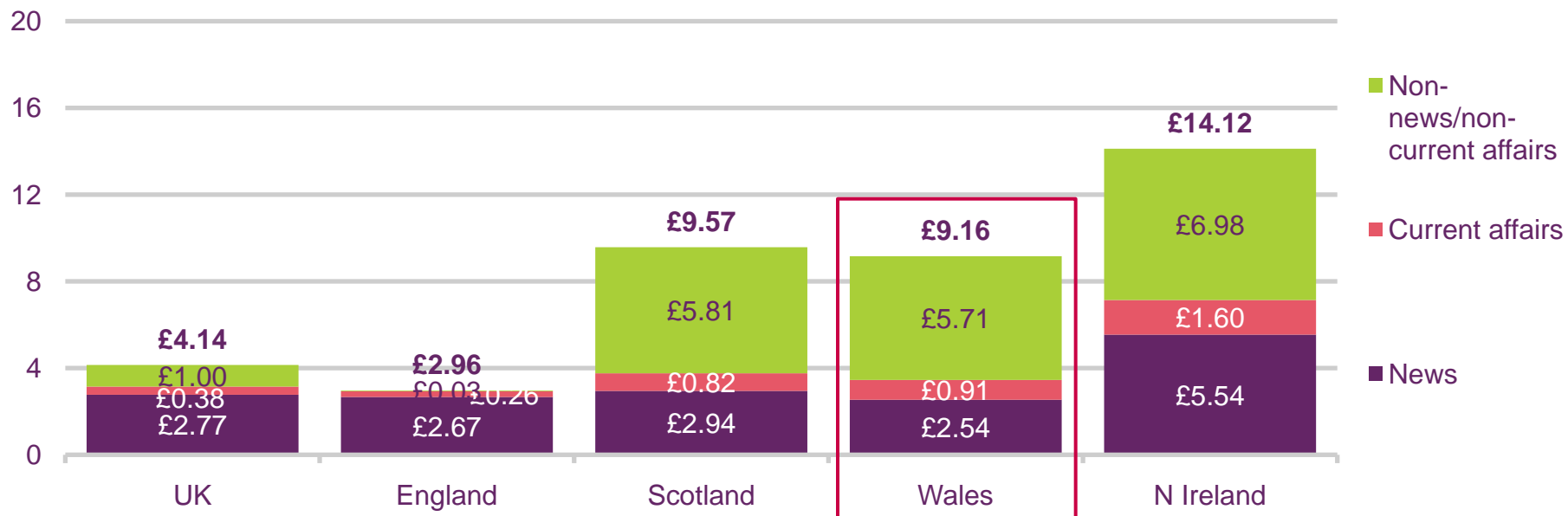
Source: Broadcasters. All figures expressed in 2009 prices.

Note: The BBC changed the way it calculated its spend figures from 2005 onwards. The figures for 2002 – 2004 are based on cost per hour averages, while those for 2005 - 2008 are actual spend figures. Comparisons over the period 2003-2008 should therefore be exercised with caution. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

Figure 2.8

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

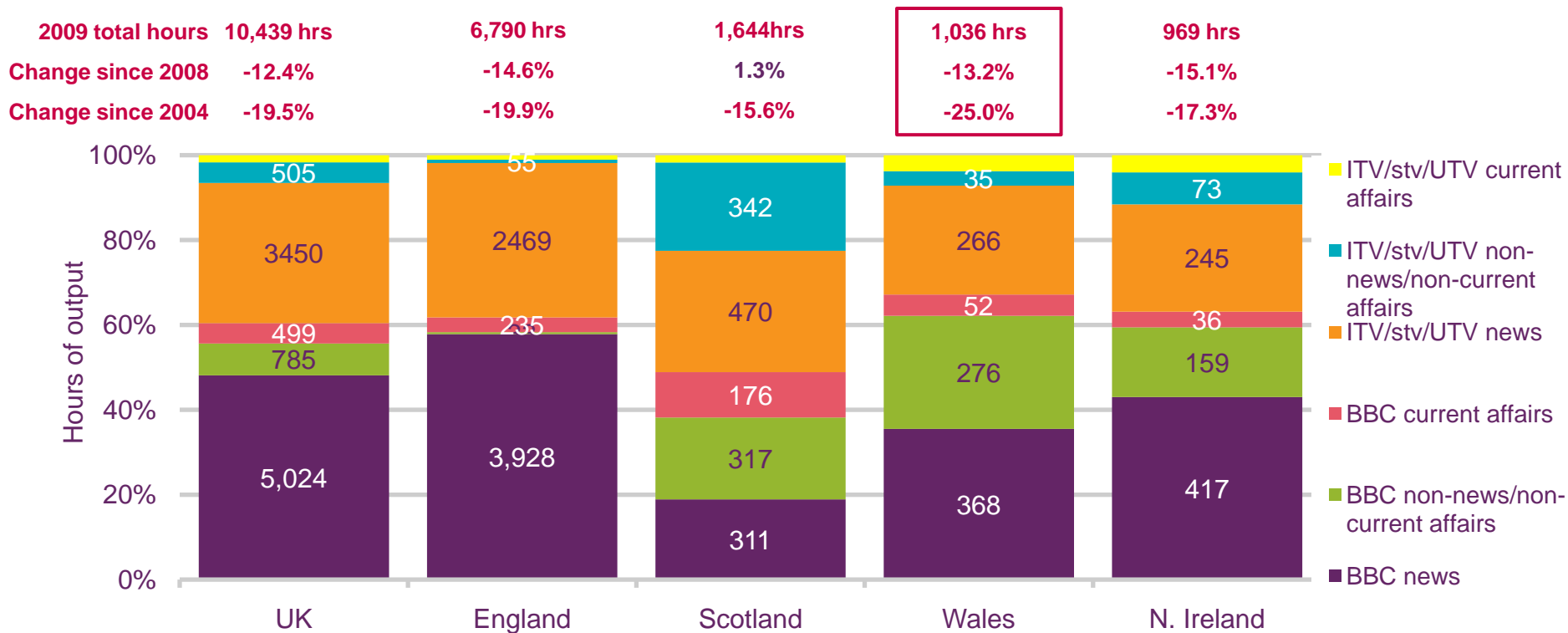
Investment per head (£m, 2009 prices)



Source: PSB returns. Figures expressed in 2009 prices. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

Figure 2.9

Hours of regionalised output by genre and broadcaster, 2009



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.

Figure 2.10

Regionalised output cost per hour by nation 2004 - 2009



Source: Broadcasters. All figures expressed in 2009 prices.

Note: The BBC changed the way it calculated its spend figures from 2005 onwards. The figures for 2002 – 2004 are based on cost per hour averages, while those for 2005 - 2008 are actual spend figures. Comparisons over the period 2003-2008 should therefore be exercised with caution. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

Figure 2.11

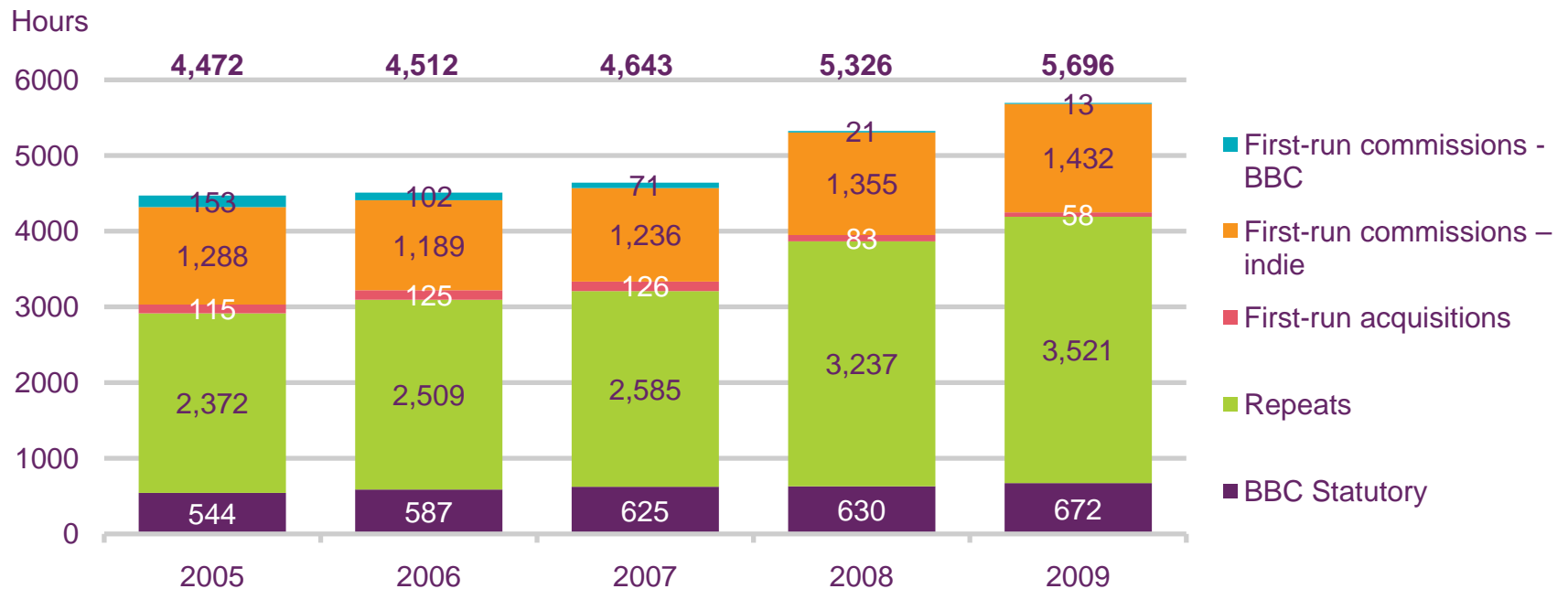
Spend on Welsh language output on S4C



Source: S4C data provided to Ofcom. All figures are expressed in 2009 prices

Figure 2.12

Type of Welsh language output on S4C, by hours



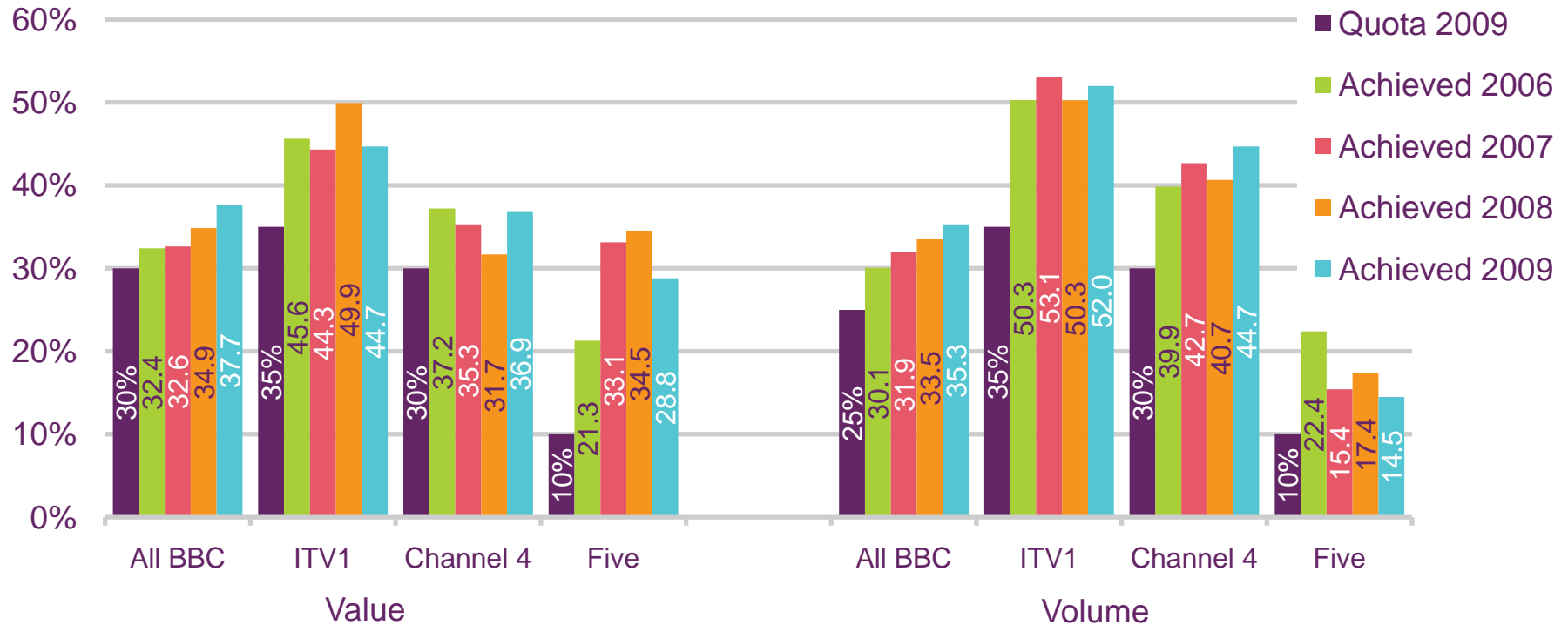
Source: S4C Annual Accounts

Note: this excludes spend on acquisitions and repeats, and excludes BBC investment in statutory hours

Figure 2.13

Performance against the Out-of-London production quotas

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

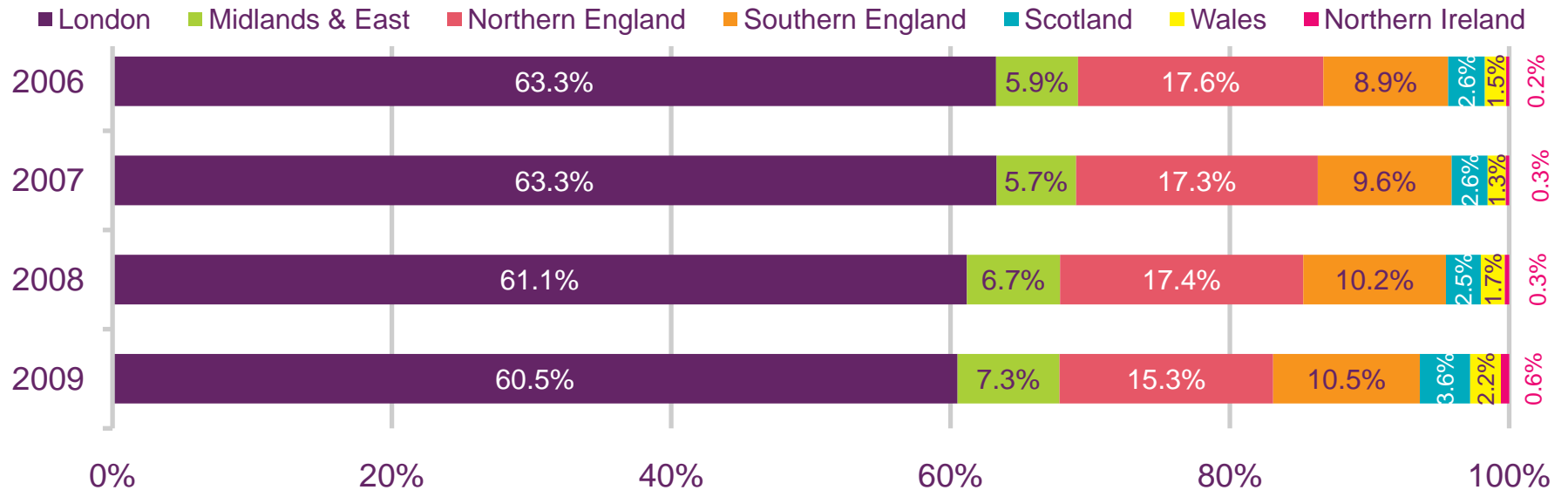


Source: Ofcom/broadcasters

Figure 2.14

Expenditure on out-of-London production

Percentage of production by value

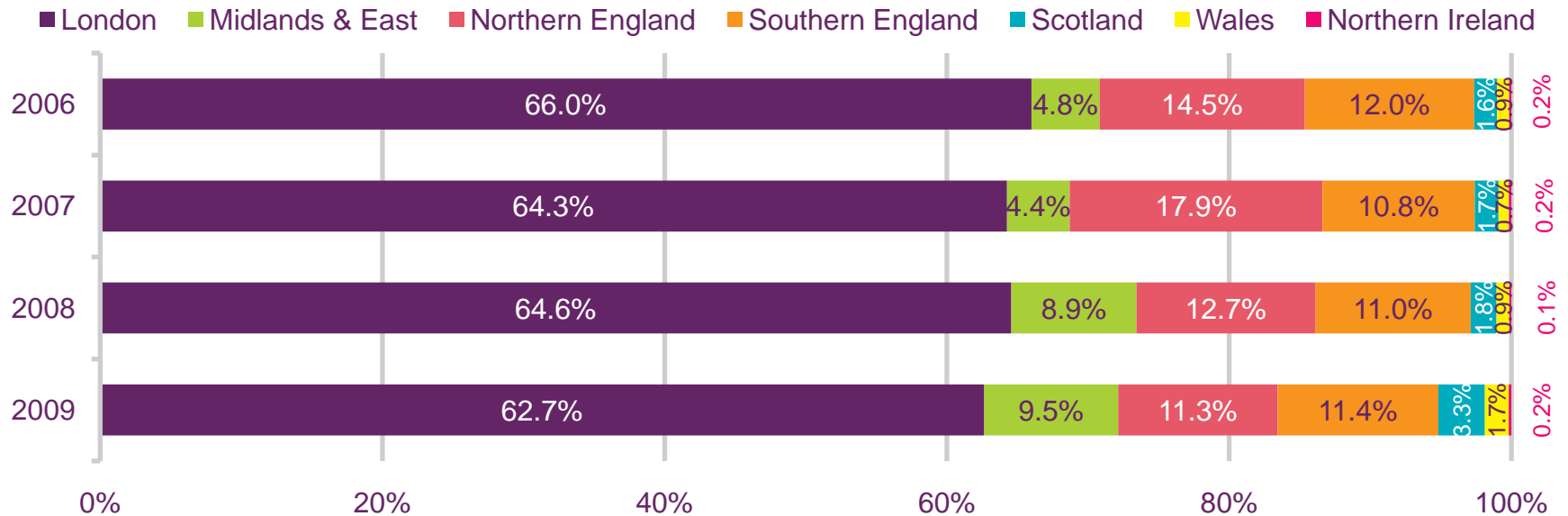


Source: Ofcom/broadcasters

Figure 2.15

Volume of out-of-London production

Percentage of production by volume



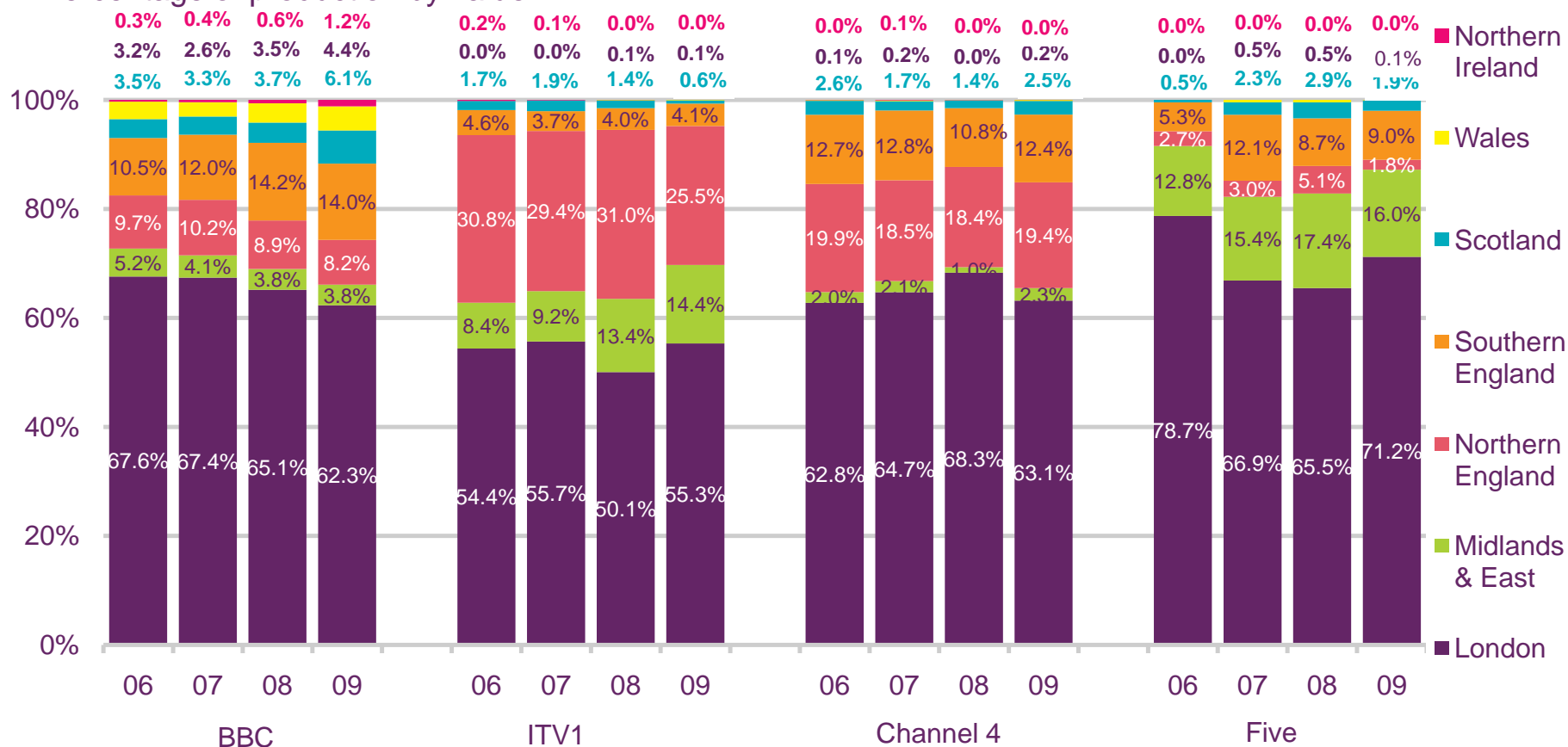
Source: Ofcom/broadcasters

Figure 2.16



Breakdown of expenditure on production by broadcaster

Percentage of production by value

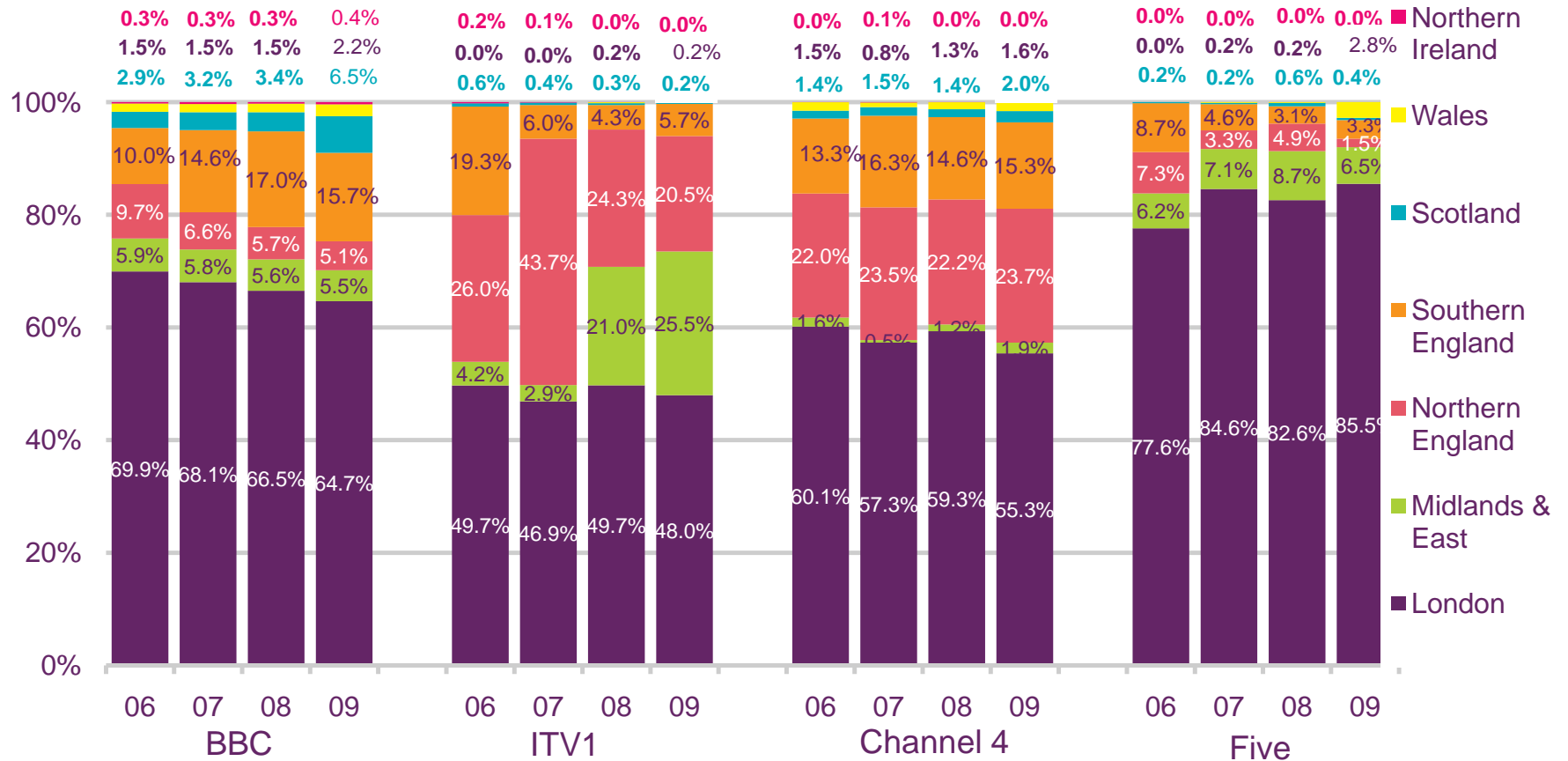


Source: Ofcom/broadcasters

Figure 2.17

Breakdown of production volume, by broadcaster

Percentage of production by volume



Source: Ofcom/broadcasters

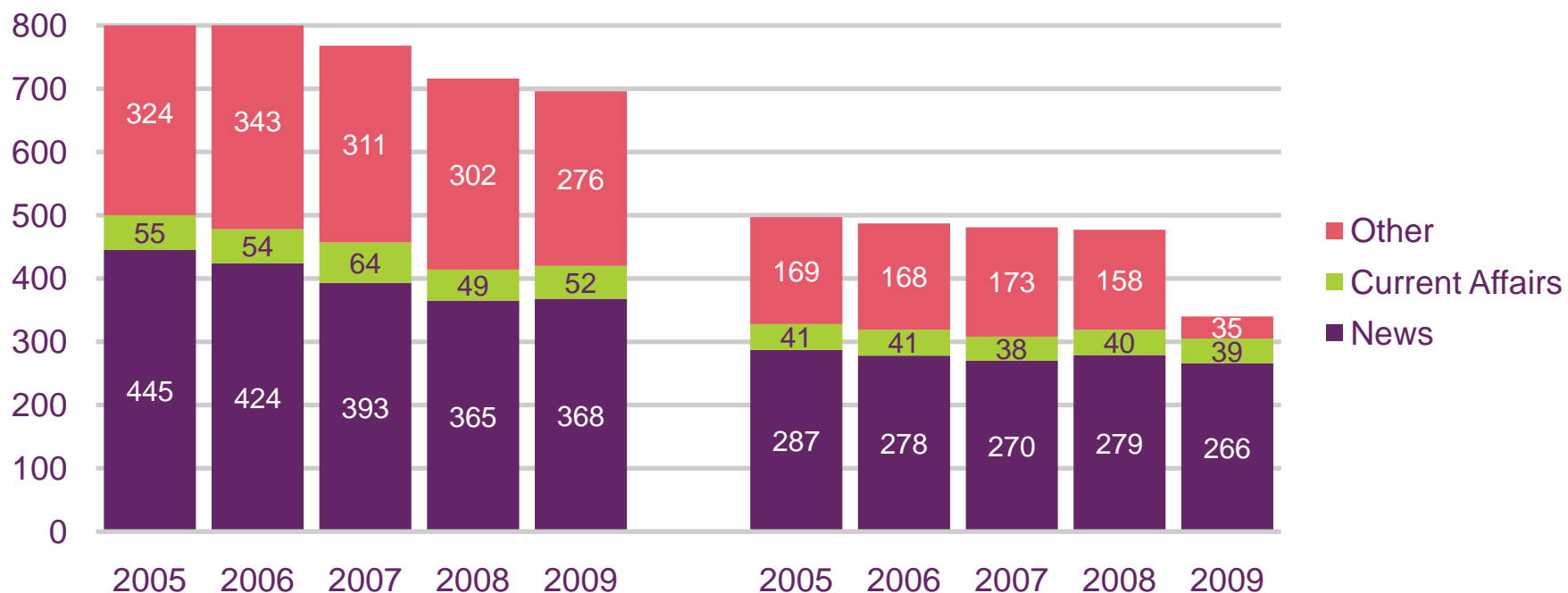
Figure 2.18

Non-network output in Wales, 2005-2009

BBC non-network output in Wales
824 821 768 716 696

ITV non-network output in Wales
497 487 481 477 340

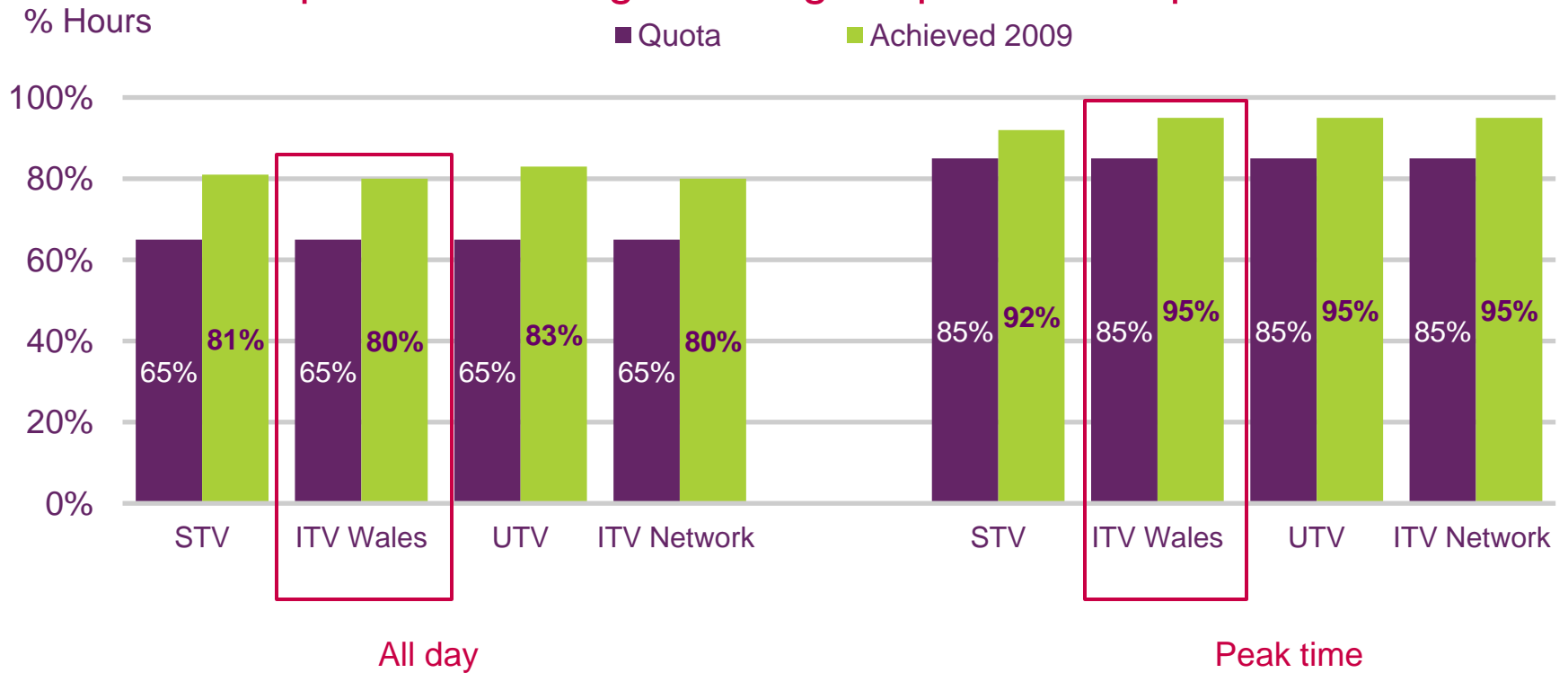
Hours per year



Source: Ofcom/broadcasters
Note: Figures exclude repeats

Figure 2.19

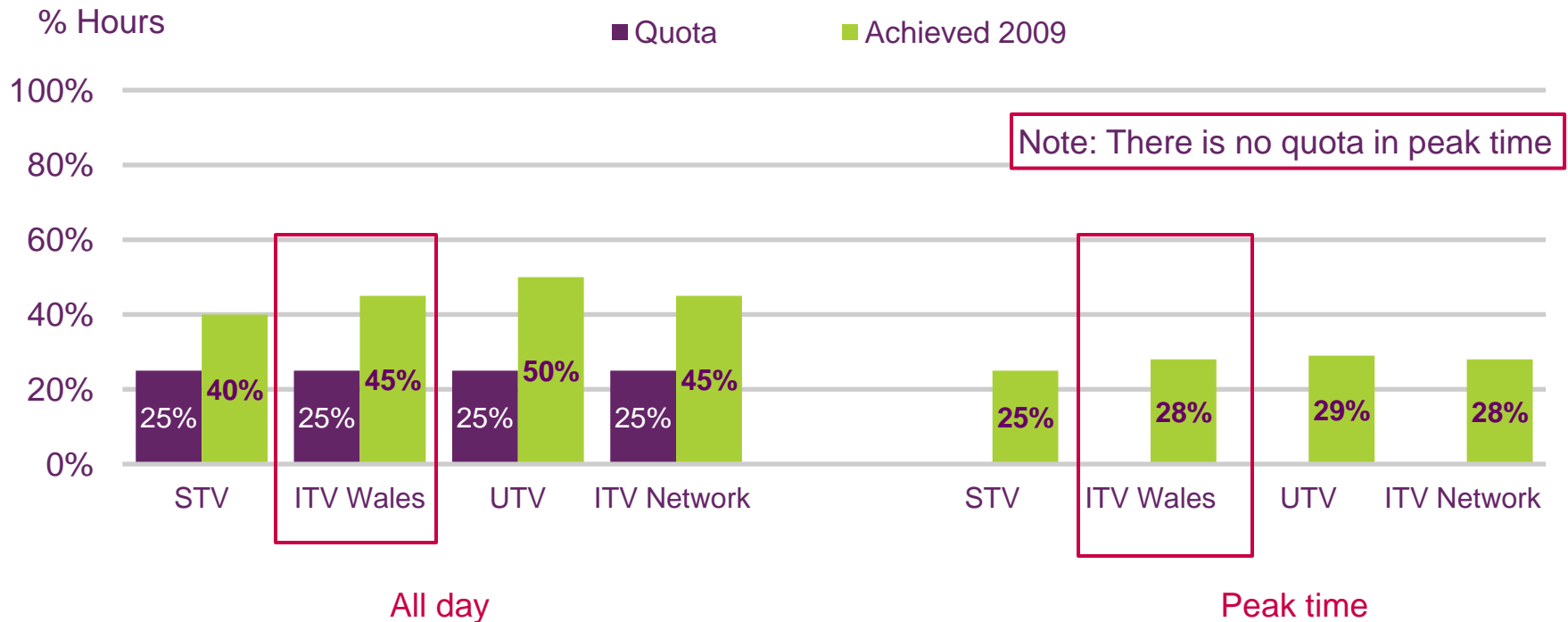
ITV Nations' performance against original production quotas



Source: Ofcom/broadcasters

Figure 2.20

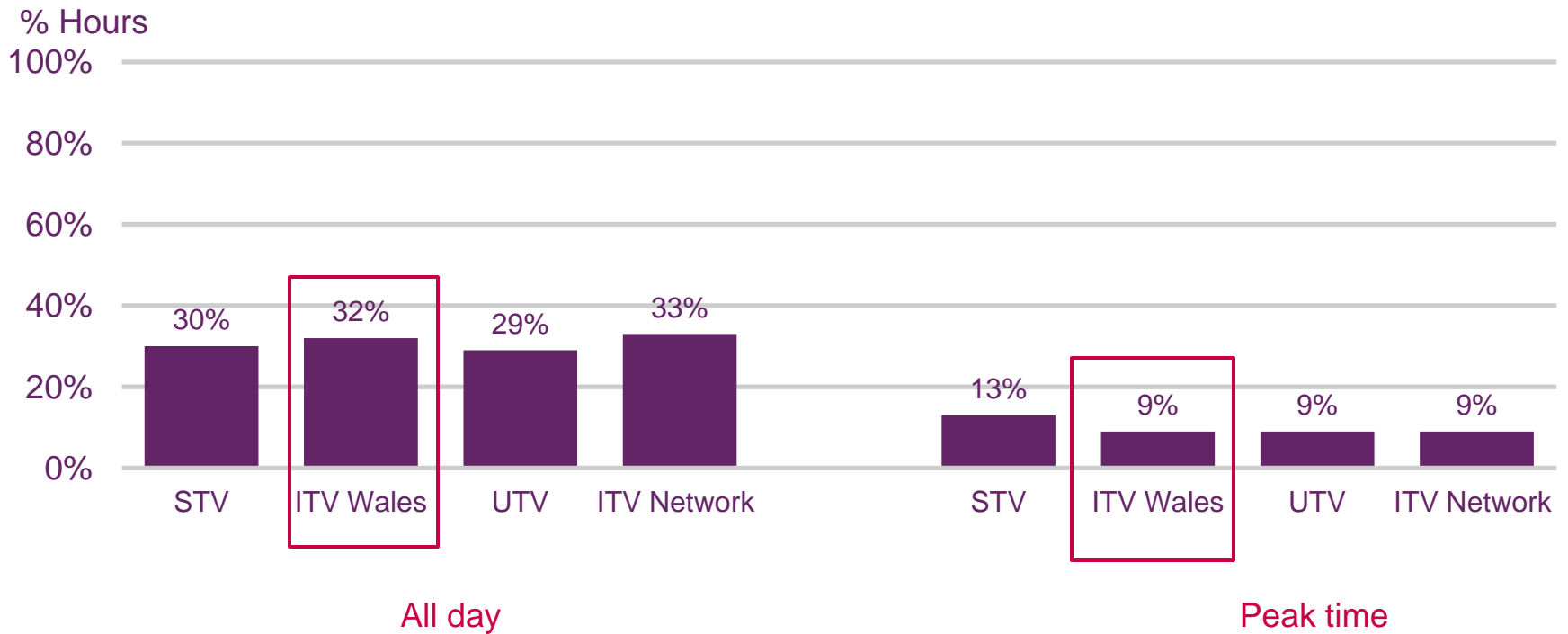
ITV's performance against the independent quota



Source: Ofcom/broadcasters

Figure 2.21

Proportion of repeats broadcast on ITV, 2009



Source: Ofcom/broadcasters

Figure 2.22

Take-up digital TV

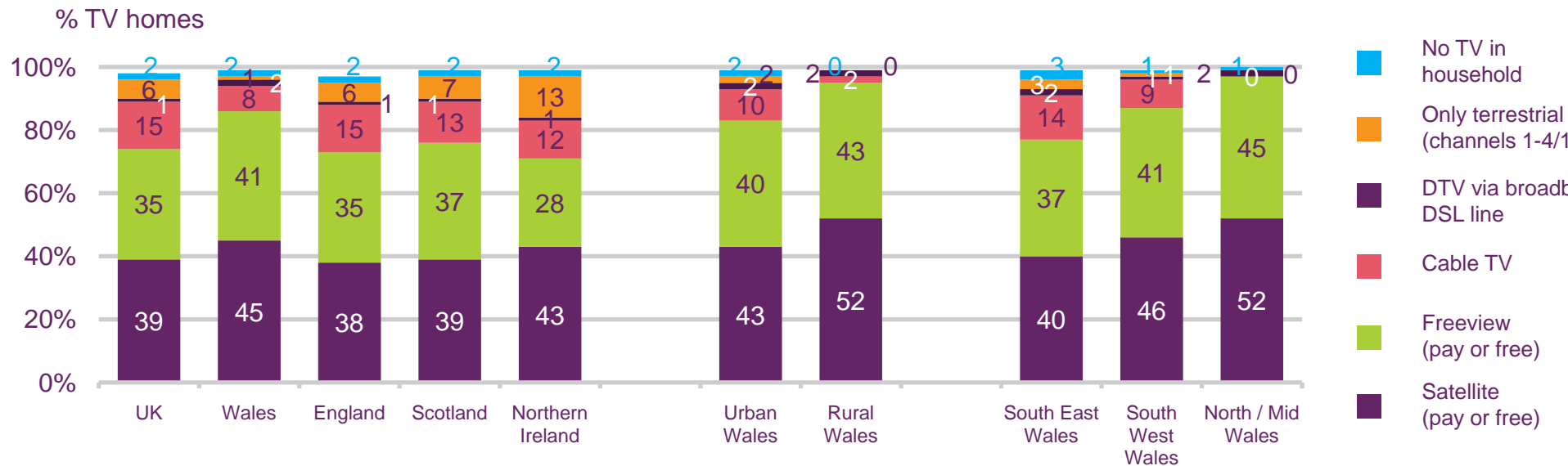


Source: Ofcom research, Quarter 1 2010

Base: All adults aged 15+ with a TV in household (n = 8858 UK, 1060 Wales, 5600 England, 1452 Scotland, 746 Northern Ireland, 796 Wales urban, 264 Wales rural, 340 South East Wales, 356 South West Wales, 364 North/ Mid Wales)

Figure 2.23

Main TV set share by platform



QH1a. And which of these do you consider is your main type of television?

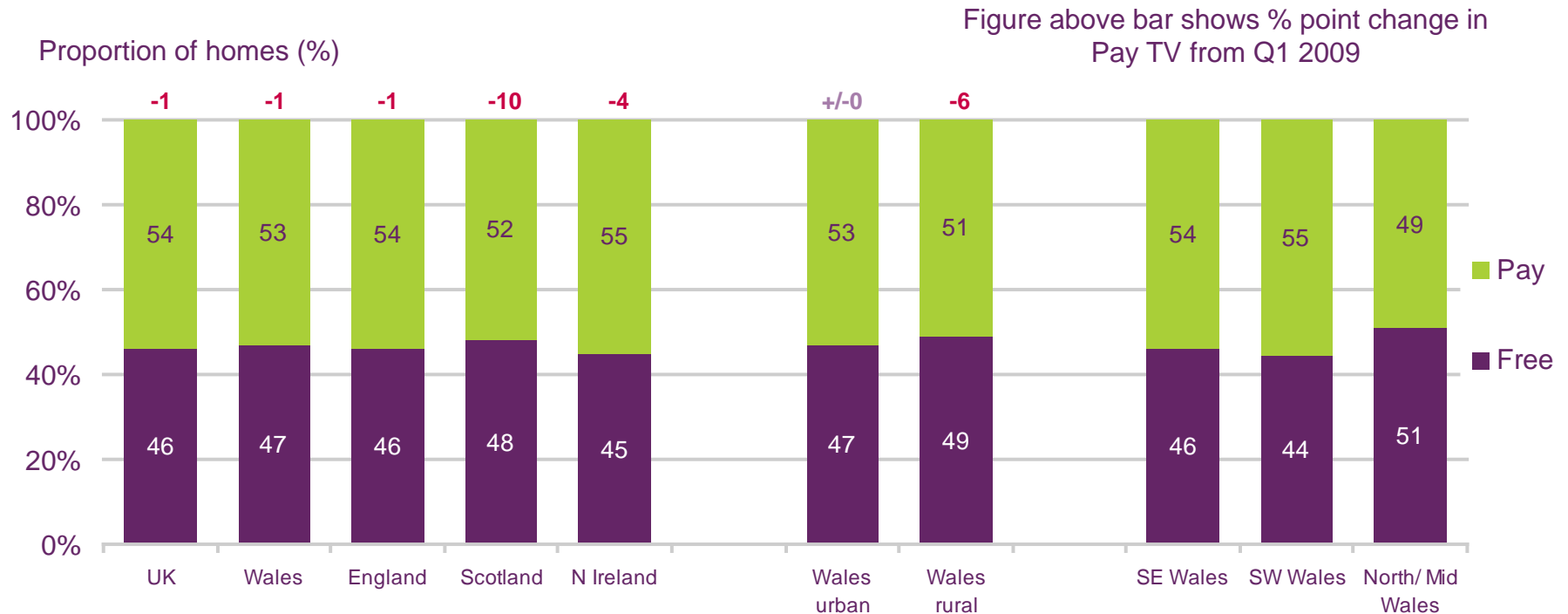
Source: Ofcom research, Quarter 1 2010

Base: All adults aged 15+ (n = 9013 UK, 1075 Wales, 5709 England, 1468 Scotland, 761 Northern Ireland, 810 Wales urban, 265 Wales rural, 348 South East Wales, 360 South West Wales, 367 North/ Mid Wales)

Note: Figures may not add to 100% due to rounding, also an element of survey respondents who may own a digital TV platform but still selected terrestrial TV as their primary viewing platform.

Figure 2.24

Proportion of homes with free and pay television



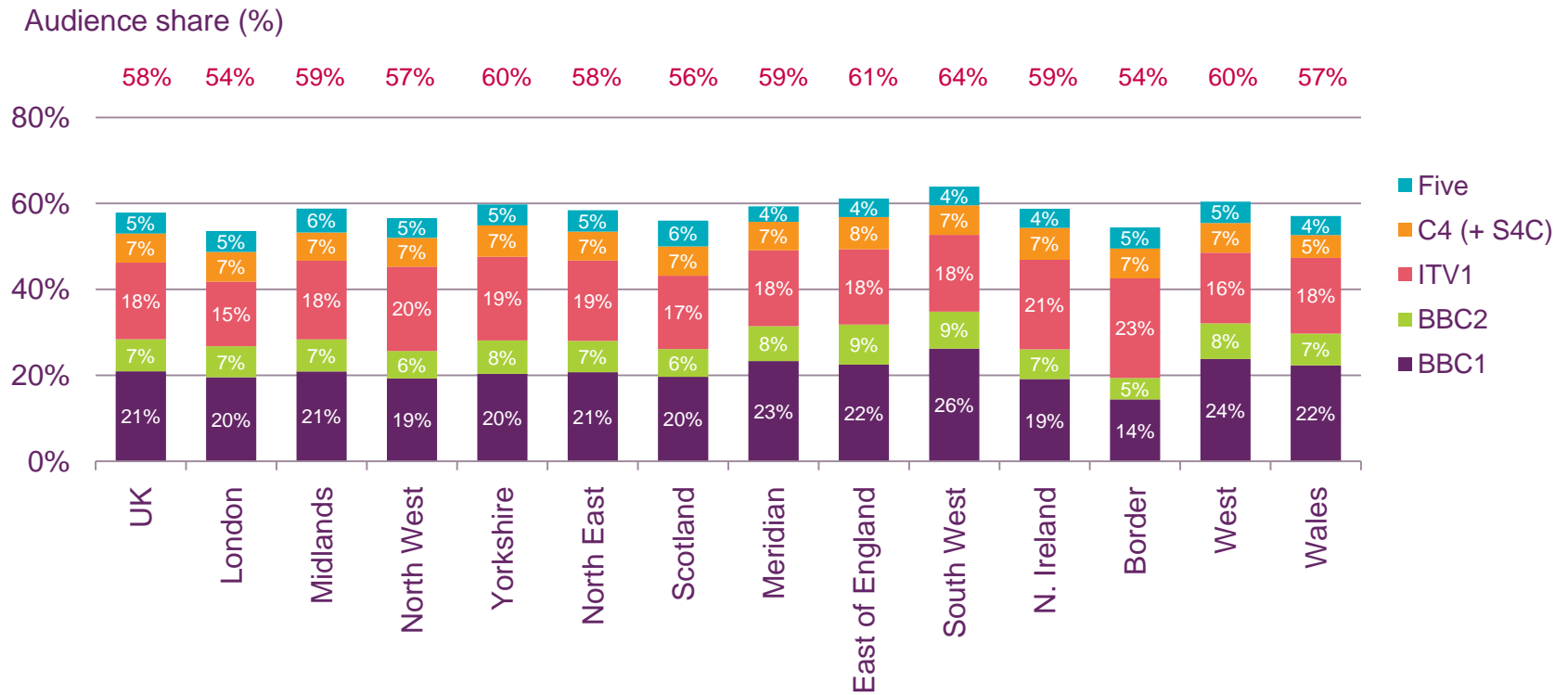
Source: Ofcom research, Quarter 1 2010

Base: All adults aged 15+ with a TV in household (n = 8858 UK, 1060 Wales, 5600 England, 1452 Scotland, 746 Northern Ireland, 796 Wales urban, 264 Wales rural, 340 South East Wales, 356 South West Wales, 364 North/ Mid Wales)

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

Figure 2.25

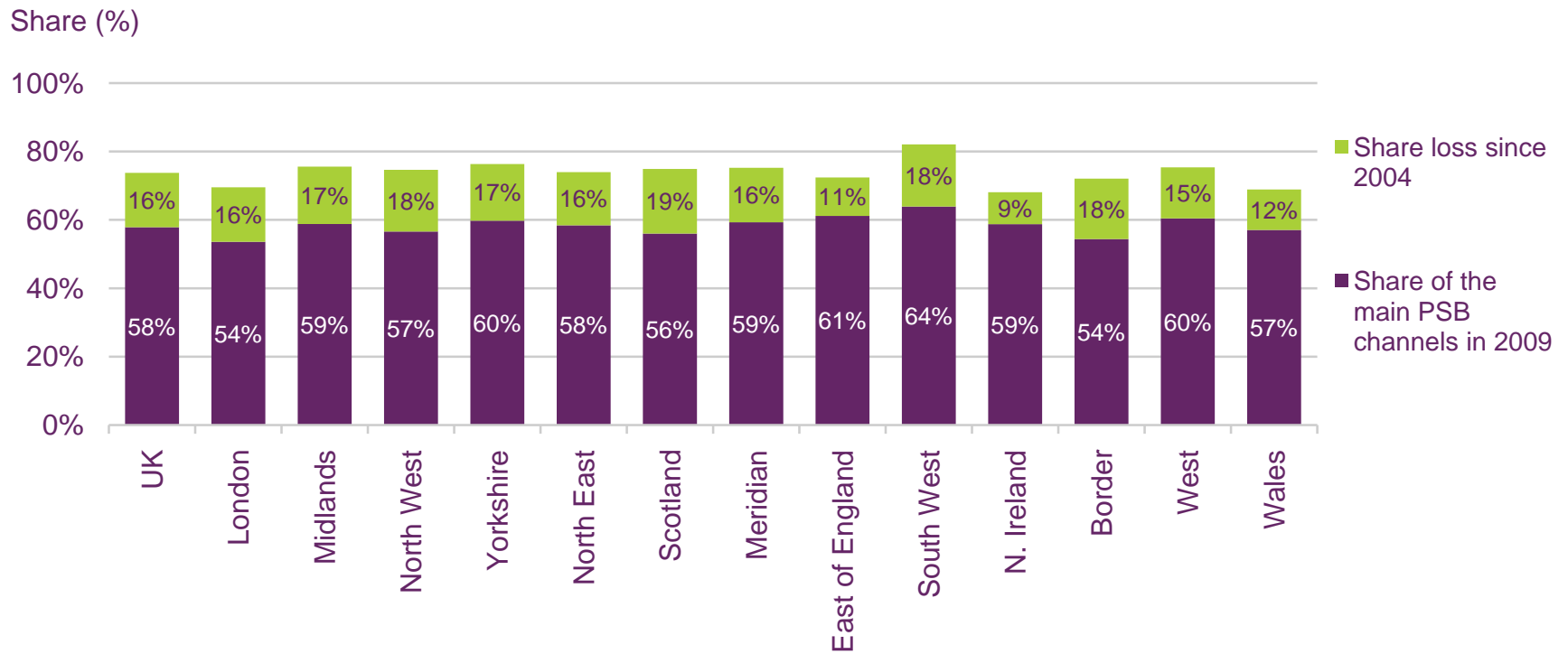
Share of the five terrestrial networks in all homes, 2009



Source: BARB

Figure 2.26

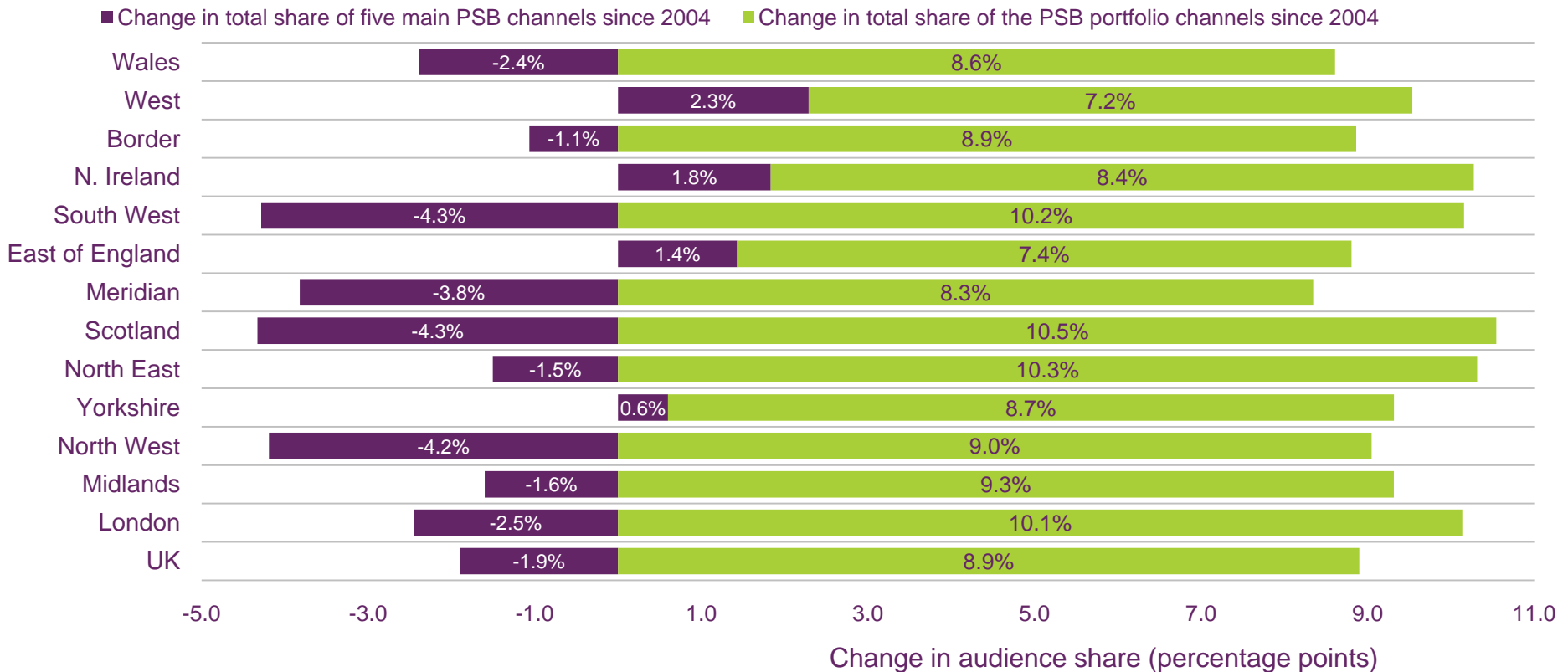
Reduction in combined share of the main PSB channels, 2004 - 2009



Source: BARB

Figure 2.27

Net change in the audience share of the main PSB channels and the PSB portfolio channels in multichannel homes, 2004 – 2009

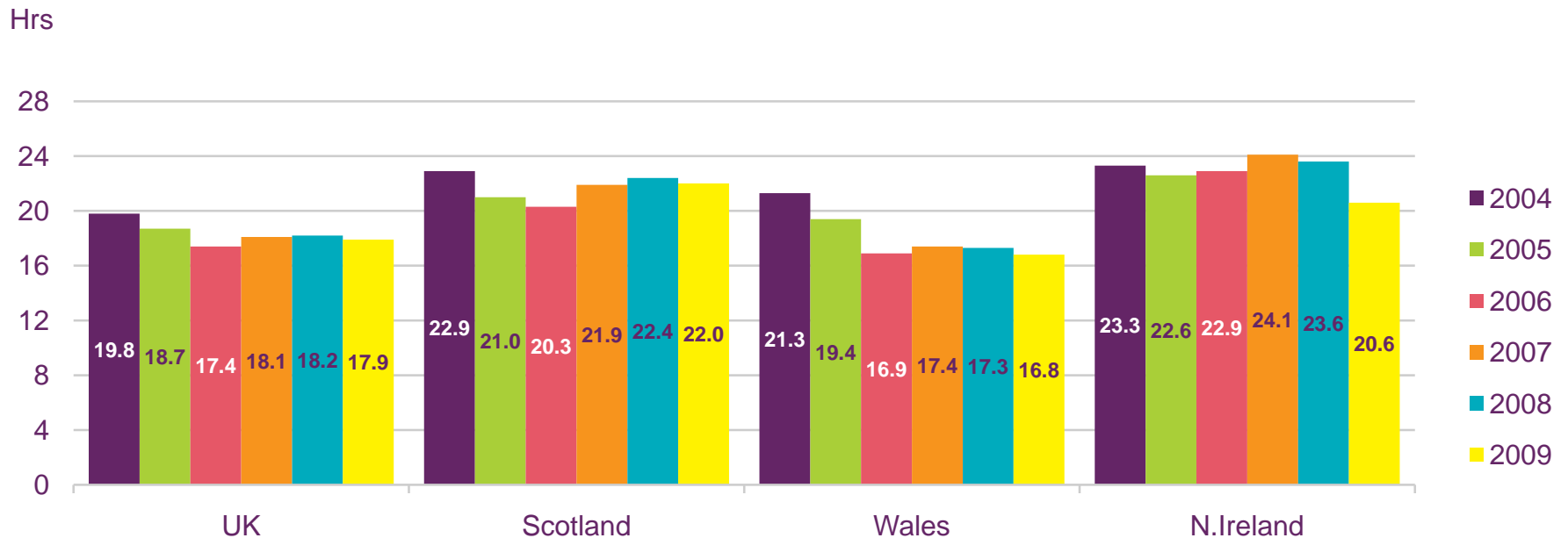


Source: BARB

Note: 'PSB portfolio channels' includes all PSB channels except for the five terrestrial channels

Figure 2.28

Combined total hours of viewing of early evening nations news bulletins, all homes in 2004-2009, by nation

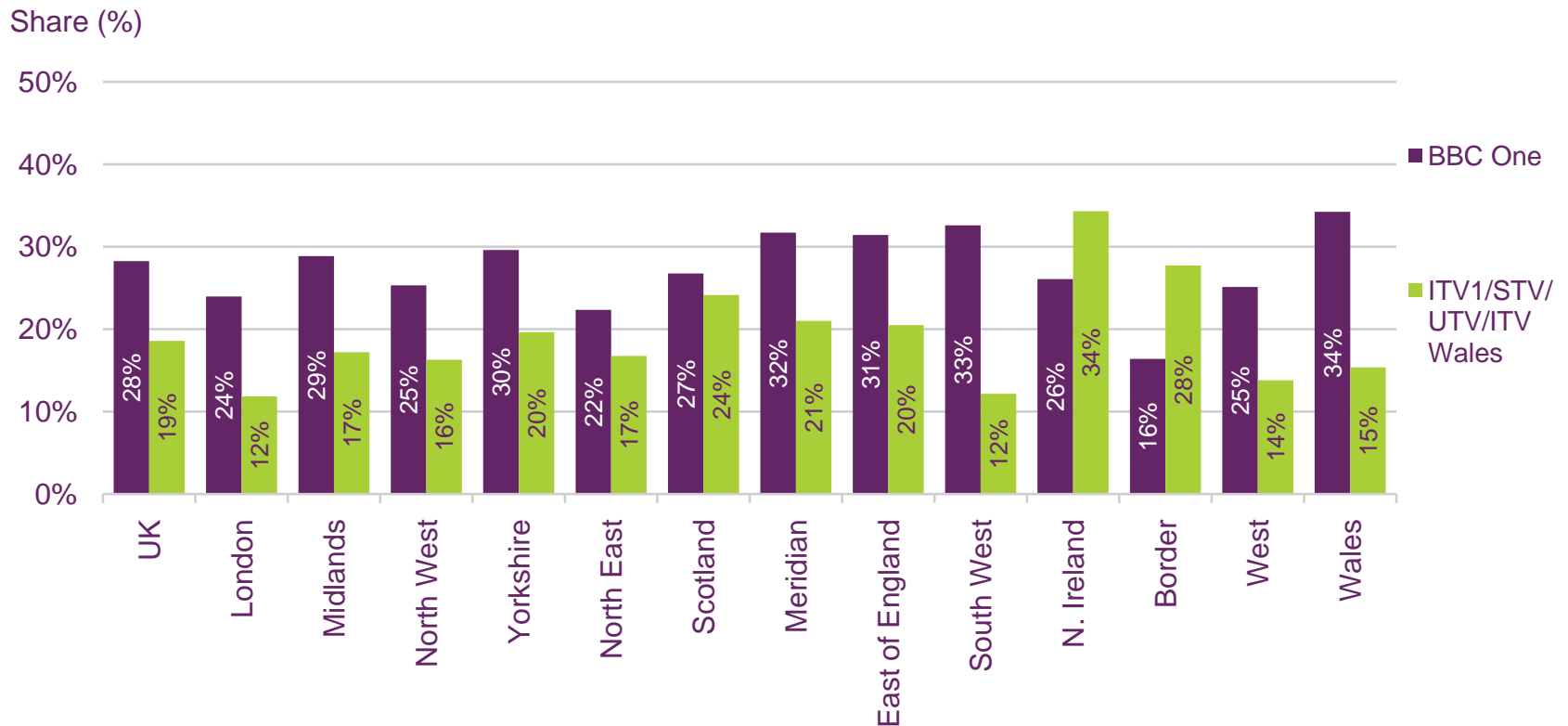


Source: BARB

Note: Analysis done on genre Regional News, start time 17:55-18:35, 10mins+ duration, channels BBC1 and ITV1 combined, M-F

Figure 2.29

BBC One and ITV1/STV/UTV/ITV Wales early evening news bulletin shares, 2009

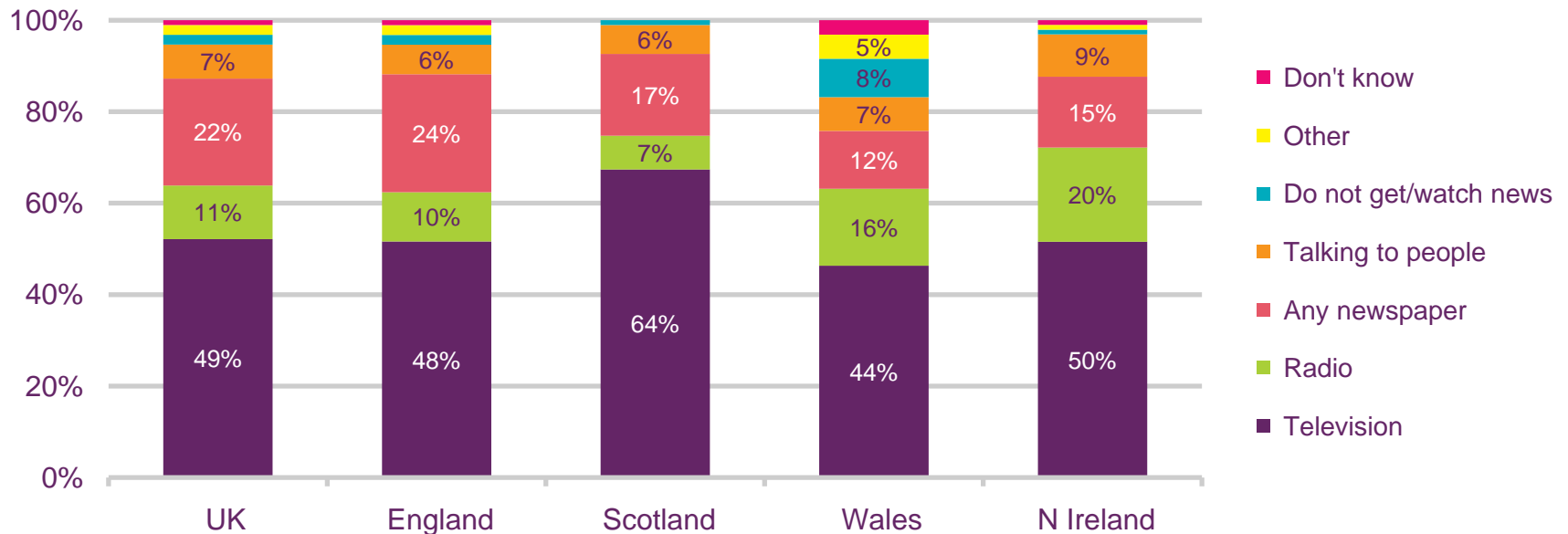


Source: BARB

Figure 2.30

Sources of local news for each nation

What is your main source of news about what is going on in your local area?



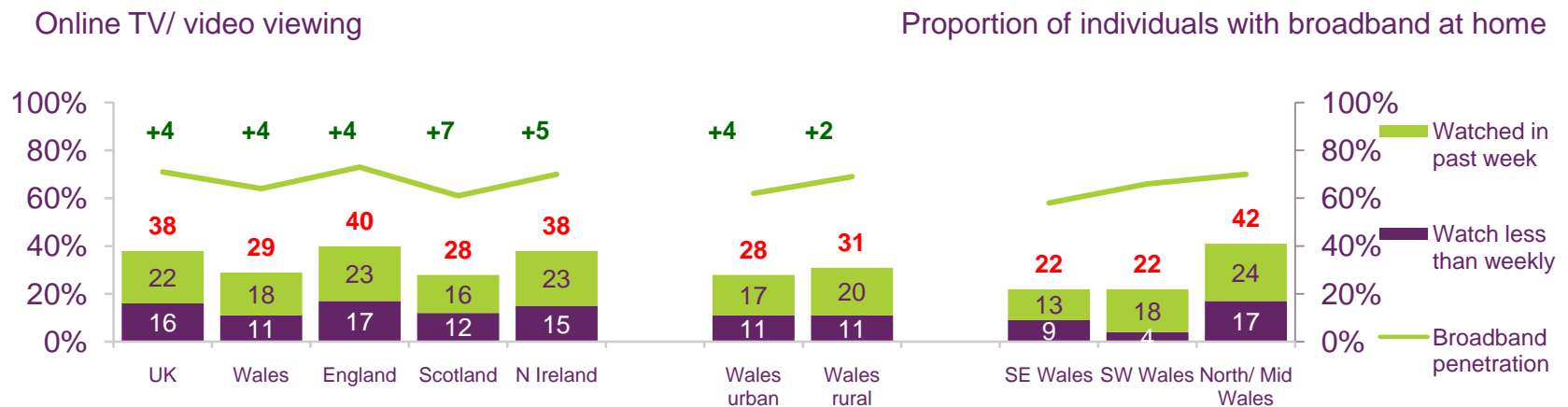
Source: Ofcom Media Tracker Survey 2009

Base: All adults 15+. n = 2044 (UK), 1713 (Eng) 180 (Sc), 113 (Wa), 108 (NI)

Only responses ≥ 5% labelled

Figure 2.31

Proportion of adults living in a household that has used the internet to watch TV or video content



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?

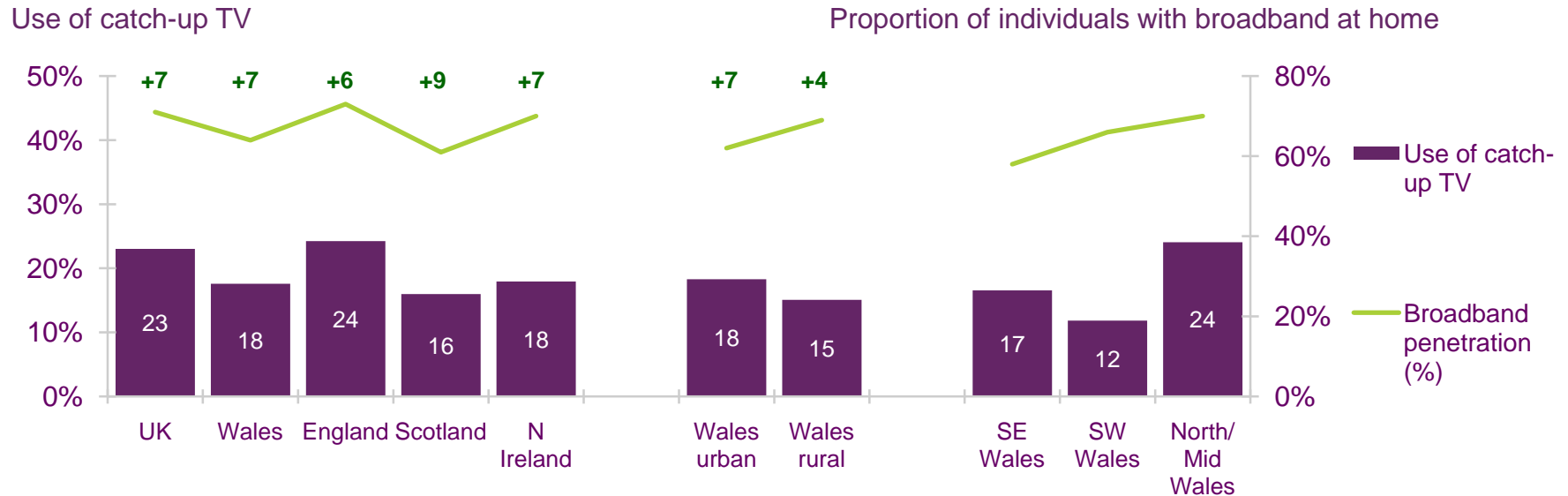
Source: Ofcom research, Quarter 1 2010

Base: All adults aged 15+ (n = 9013 UK, 1075 Wales, 5709 England, 1468 Scotland, 761 Northern Ireland, 810 Wales urban, 265 Wales rural, 348 South East Wales, 360 South West Wales, 367 North/ Mid Wales)

Figure 2.32

Use of catch-up TV

Figure above bar shows % point change in use of catch-up TV from Q1 2009



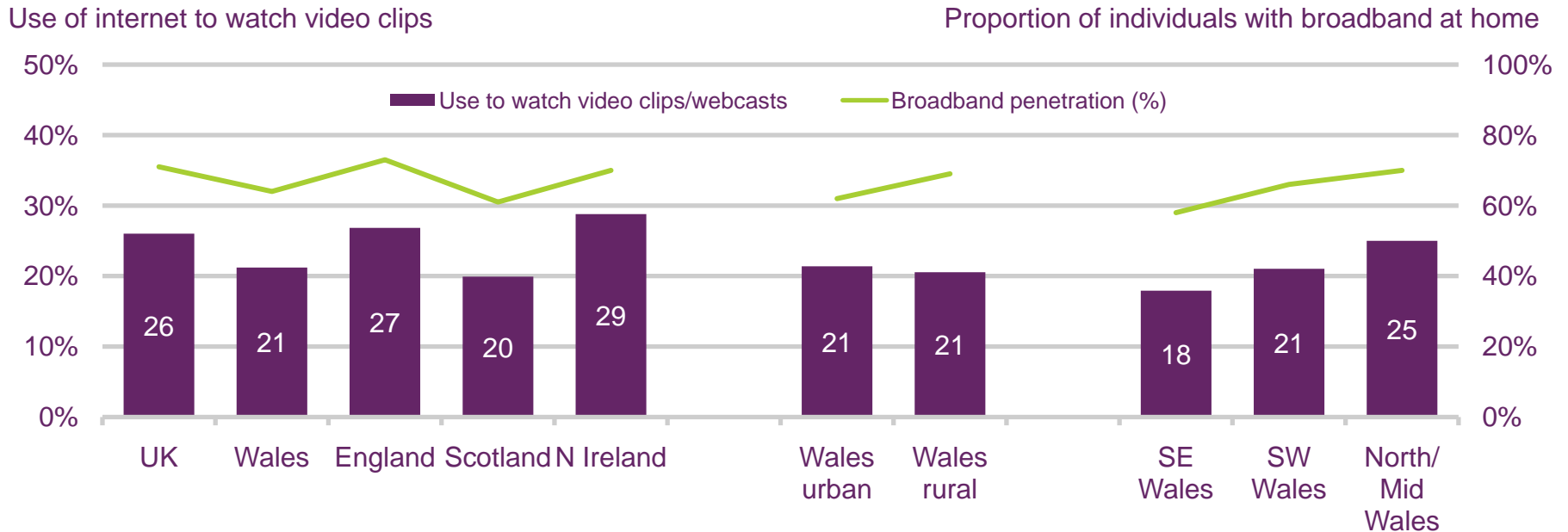
QE10A. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2010

Base: Adults aged 15+ (n= 6682 UK, 5586 England, 582 Scotland, 330 Wales, 184 Northern Ireland)

Figure 2.33

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



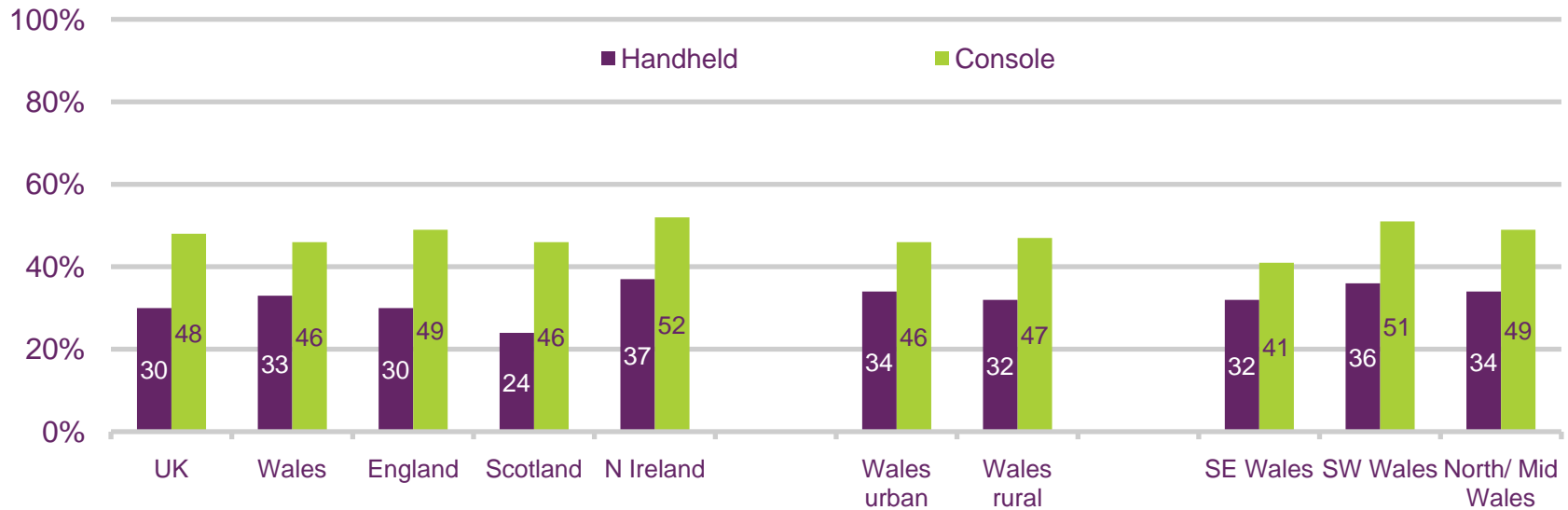
QE10A. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2010

Base: Adults aged 15+ (n= 6682 UK, 5586 England, 582 Scotland, 330 Wales, 184 Northern Ireland)

Figure 2.34

Take up of leading games consoles



QB4. Which games console/s do you or does anyone in your household have at the moment?

Source: Ofcom research, Quarter 1 2010

Base: All adults aged 15+ (n = 9013 UK, 1075 Wales, 5709 England, 1468 Scotland, 761 Northern Ireland, 810 Wales urban, 265 Wales rural, 348 South East Wales, 360 South West Wales, 367 North/ Mid Wales)