2. Television and audio visual

1. KEY MARKET DEVELOPMENTS

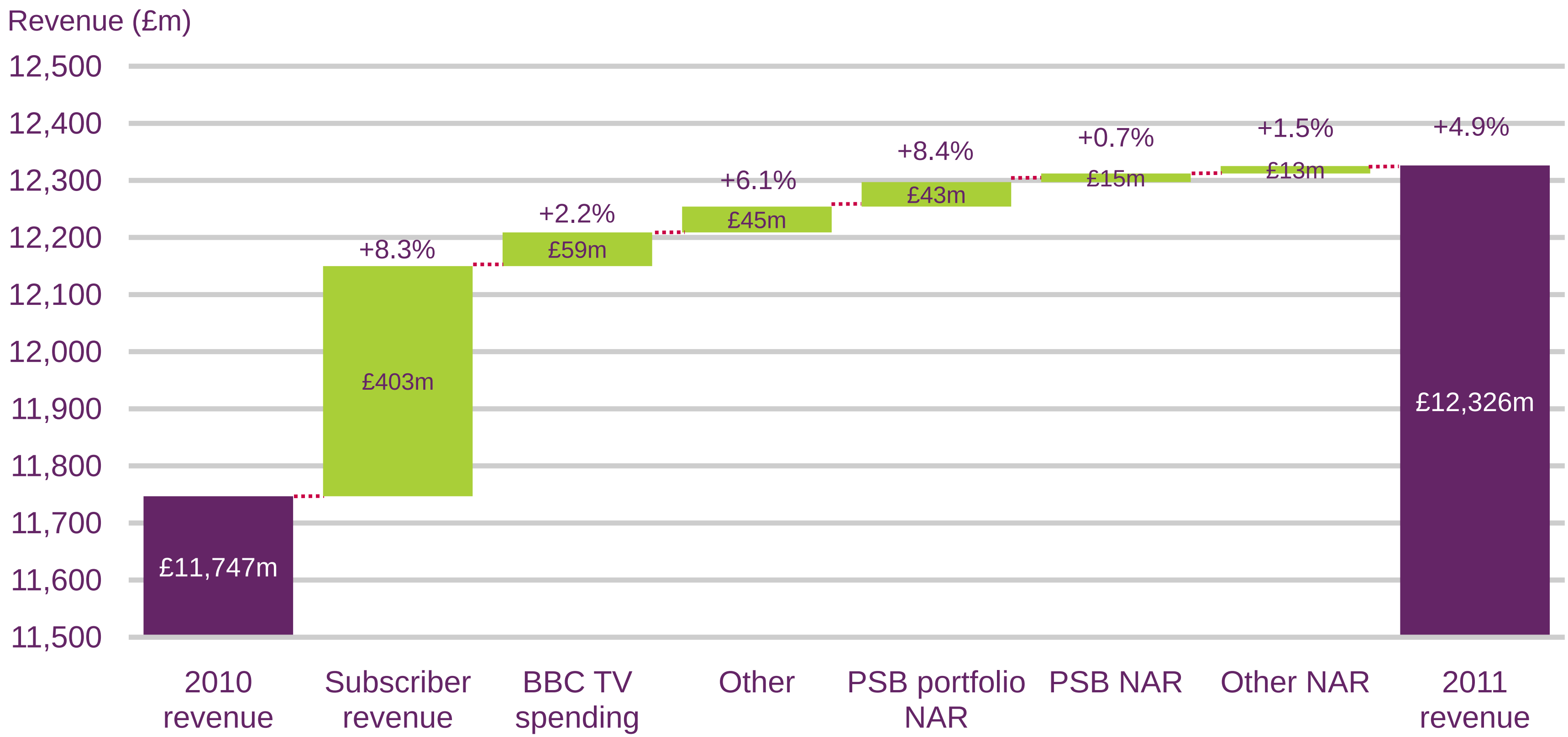
Figure 2.1
Industry metrics

UK television industry	2005	2006	2007	2008	2009	2010	2011
Total TV industry revenue (£bn)	10.5	10.6	11.1	11.2	11.1	11.7	12.3
Proportion of revenue generated by public funds	25%	25%	25%	24%	25%	23%	22%
Proportion of revenue generated by advertising	35%	33%	32%	31%	28%	30%	29%
Proportion of revenue generated by subscriptions	35%	36%	37%	39%	41%	41%	42%
TV as a proportion of total advertising spend	30%	28%	27%	27%	28%	29%	29%
Spend on originated output by 5 main networks (£bn)	3.0	2.8	2.7	2.6	2.4	2.5	2.5
Digital TV take-up	62%	70%	86%	87%	91%	93%	96%
Proportion of DTV homes paying for TV (Q1)	64%	60%	55%	53%	55%	55%	54%
Viewing per head, per day (hours) in all homes	3.65	3.60	3.63	3.74	3.75	4.04	4.03
Share of the five main channels in all homes	70%	67%	64%	61%	58%	56%	54%
Number of channels broadcasting in the UK	416	433	470	495	490	510	515

Source: Ofcom/broadcasters/Advertising Association/Warc/BARB/GfK. Note: Public funds include the DCMS grant to S4C and BBC funding that is allocated to TV; TV as a proportion of total advertising spend excludes direct mail and is based on Advertising Association/Warc Expenditure Report (www.warc.com/expenditurereport); spend on originations includes spend on nations and regions programming (not Welsh and Gaelic language programmes but some Irish language).

Figure 2.2

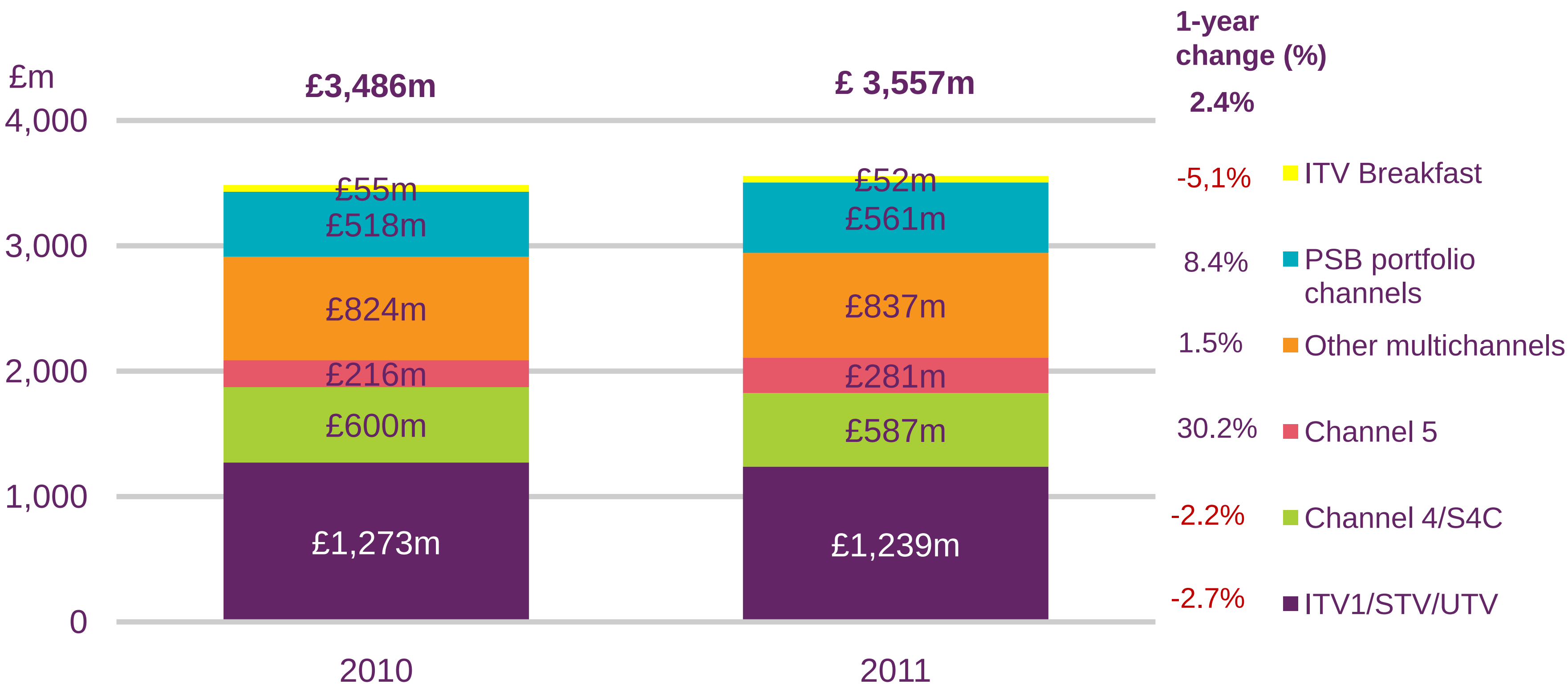
Total TV industry revenue, by source



Source: Ofcom/broadcasters. Note: Figures expressed in nominal terms. PSB NAR comprises Channel 3 licensees (including ITV Breakfast, ITV Plc, Channel Television, STV and UTV), Channel 4, Channel 5 and S4C. PSB portfolio NAR includes commercial channels owned by the PSBs (ITV2, ITV3, ITV4, E4, More 4, Film 4, 5* and 5USA. 'Other NAR' comprises the rest of the multichannel market. Platform operator revenues do not include installation costs, equipment sales or subsidies. BBC TV spending represents the amount of BBC revenue that is allocated to TV, which is estimated by Ofcom based on Note 2c in the BBC's annual report and accounts 2011/12.

Figure 2.3

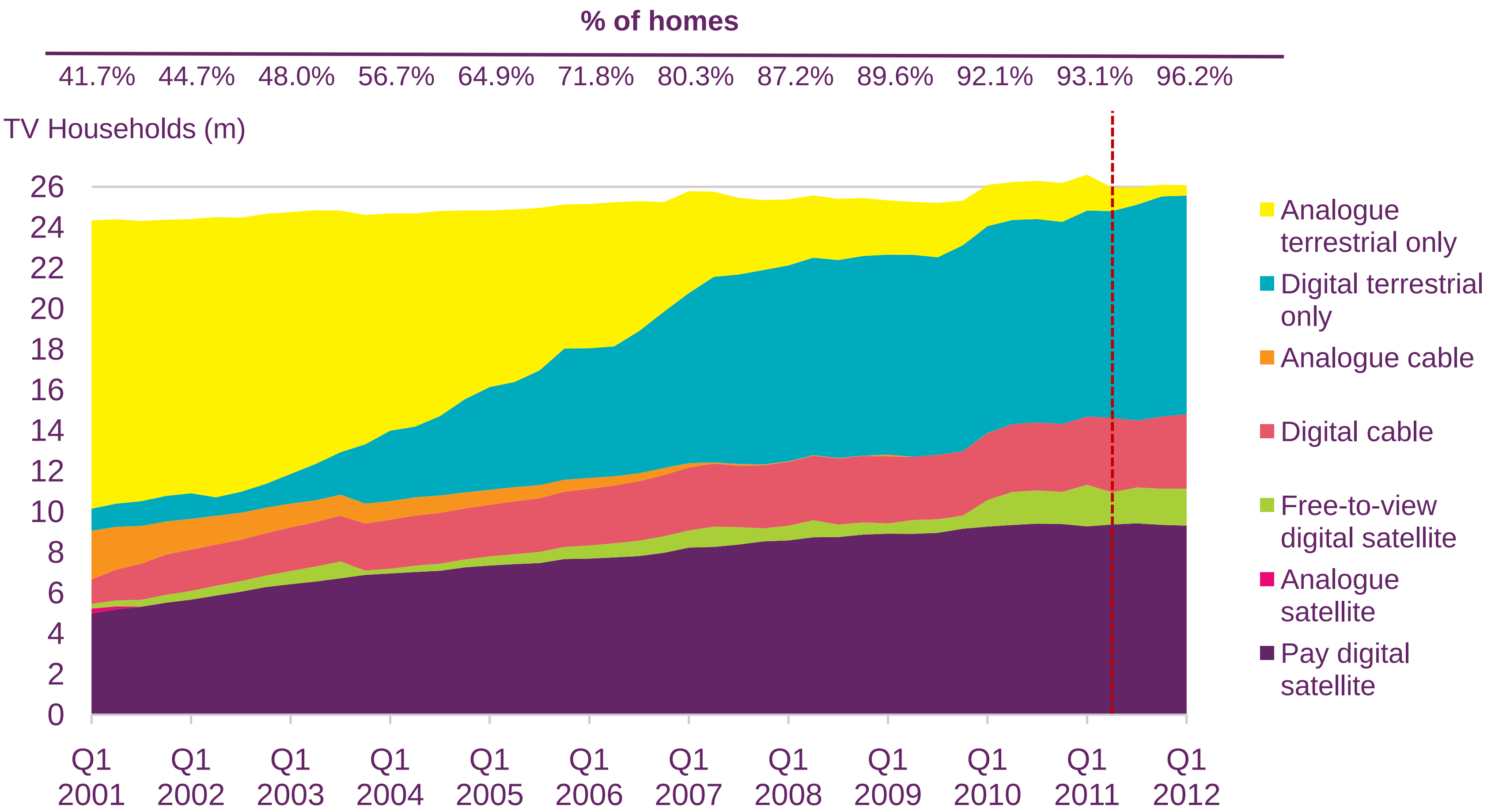
Advertising revenue, by share



Source: Ofcom/broadcasters. Note: Totals may not equal the sum of the components due to rounding. ITV1/Channel 3 includes ITV Plc, STV, UTV and Channel Television.

Figure 2.4

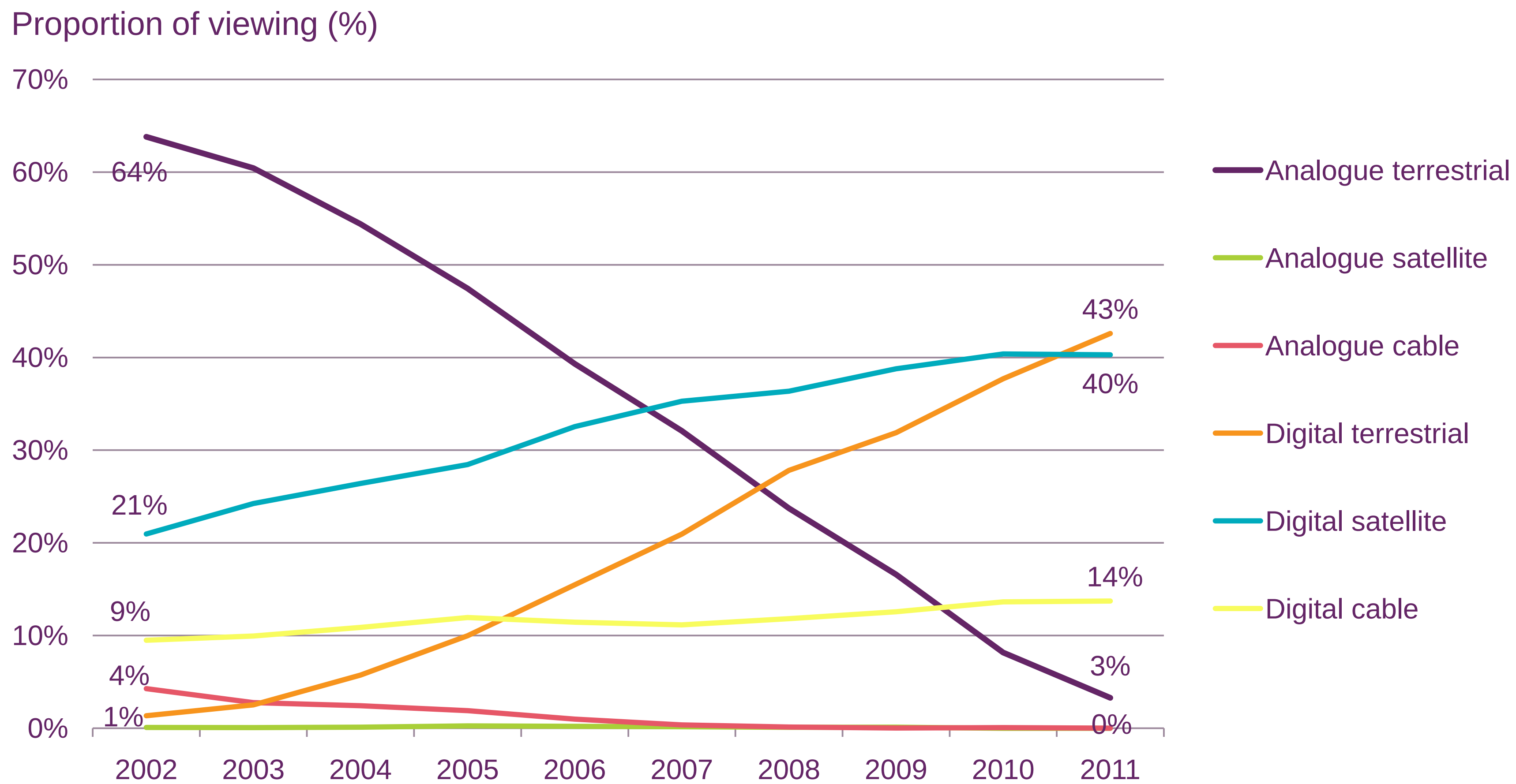
Multichannel take-up in UK households



Source: BARB Establishment Survey from Q2 2011, GfK NOP research from Q1 2007, previous quarters include subscriber data and Ofcom market estimates for DTT and free satellite. Note: Digital terrestrial relates to DTT-only homes.

Figure 2.5

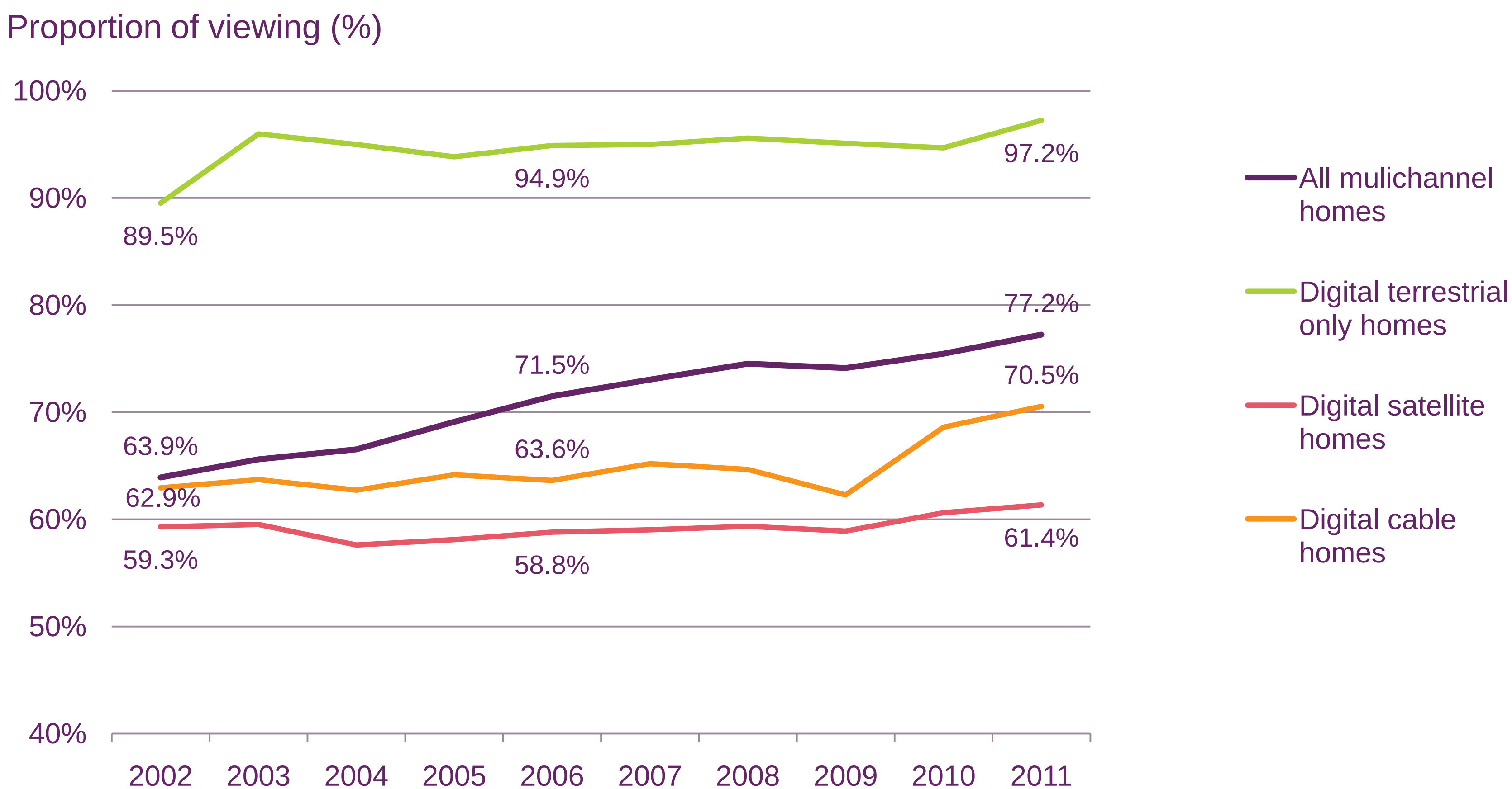
Share of TV viewing, via signal type: 2002 - 2011



Source: BARB, all individuals (4+), all homes. Based on total minutes of viewing on all sets. Note: New BARB panel introduced in 2010. As a result pre- and post-panel change data must be compared with caution.

Figure 2.6

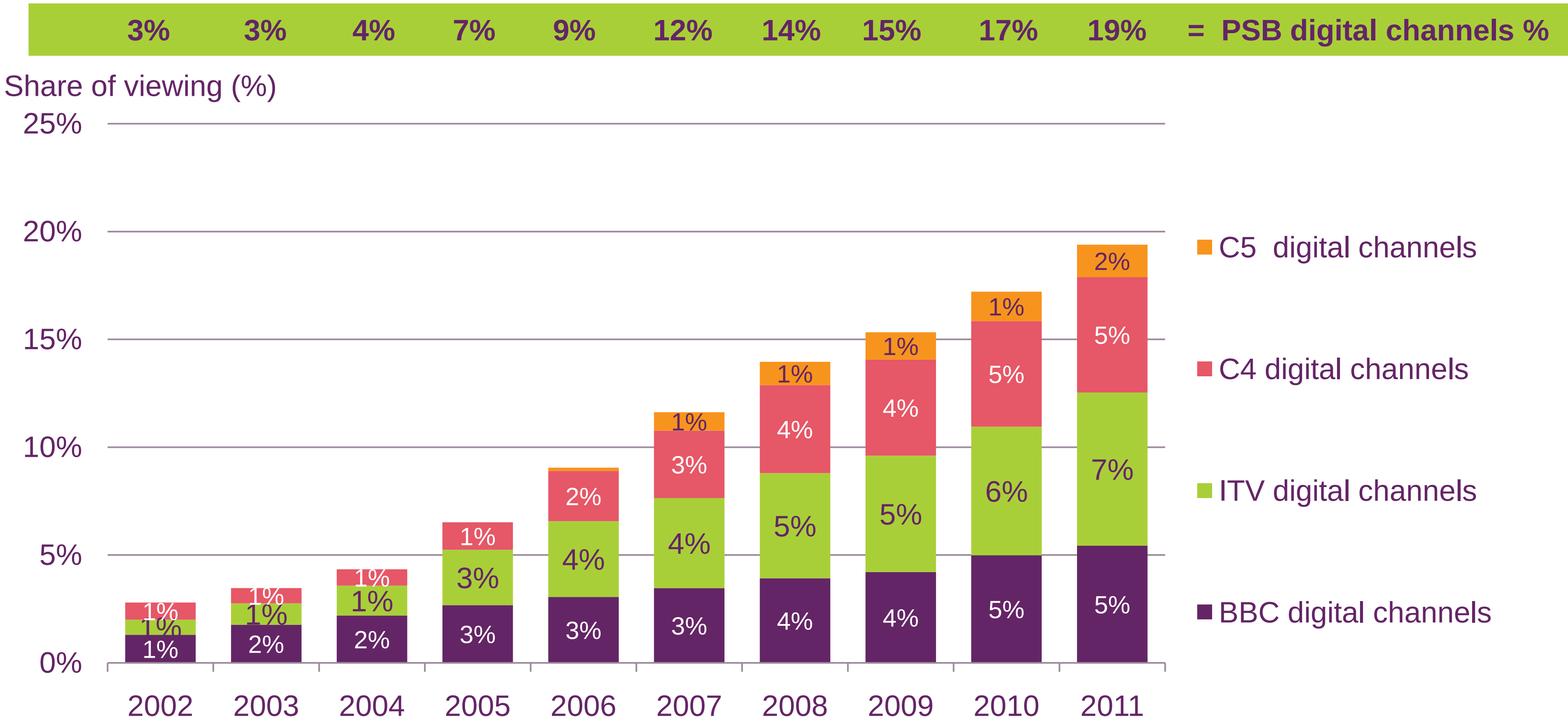
Share of TV viewing of ‘free to view’ channels, by TV home type



Source: BARB, all individuals (4+), all homes. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. ‘Free to view channels’ defined as those available on digital terrestrial only as of May 2012. Not all channels on the digital terrestrial platform were available in previous years, neither are all channels individually reported via BARB, therefore DTT total does not equal 100%.

Figure 2.7

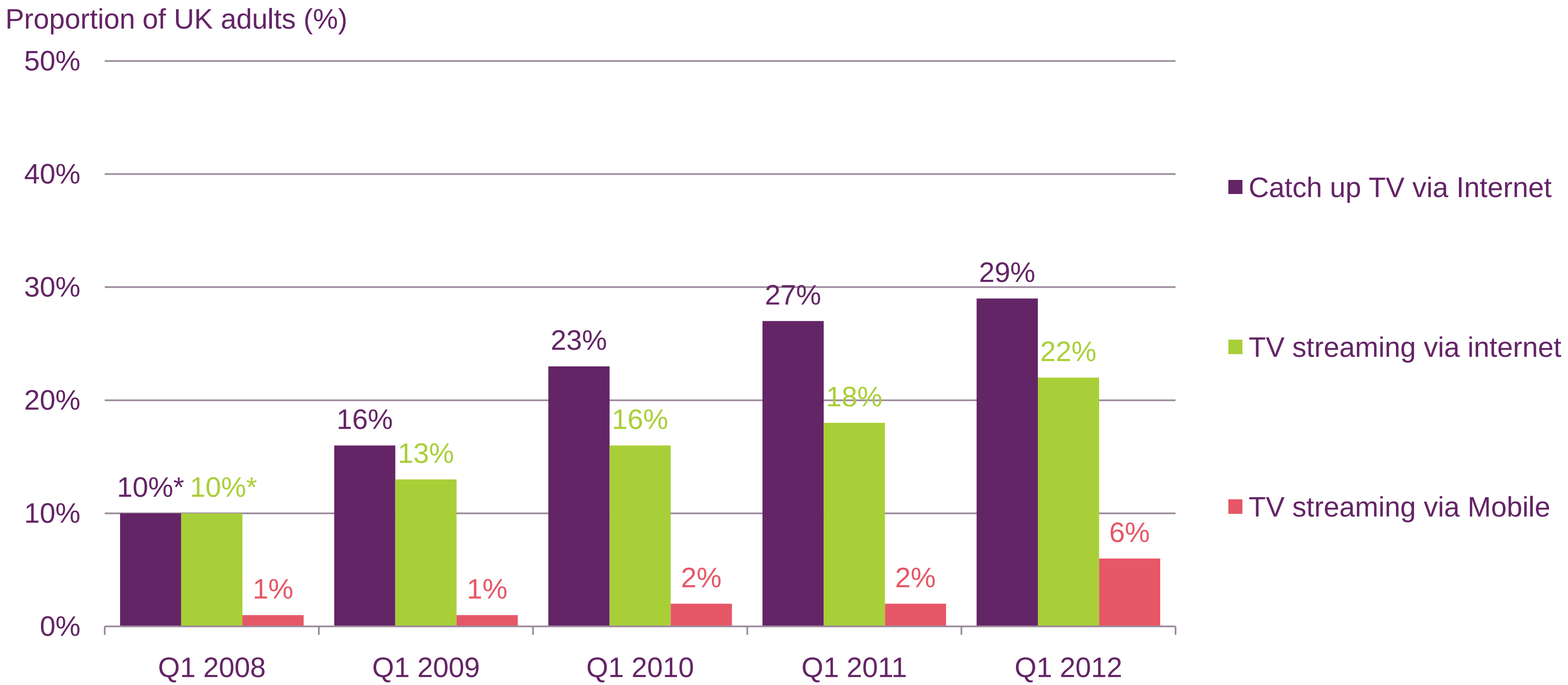
Channel share for PSB digital portfolio channels, all homes: 2002 - 2011



Source: BARB, All Individuals (4+), all homes. Note: New BARB panel introduced 1st Jan 2010. As a result, pre- and post-panel change data must be viewed with caution. Data charted based on the following channel groupings: BBC digital channels = BBC3, BBC4, BBC News, BBC Parliament, CBeebies, CBBC. ITV digital = ITV1+1, ITV2, ITV3, ITV4, CITV. C4 digital = C4+1, E4, More4, Film 4. C5 digital = C5+1, 5*, 5USA. Time-shifted channels for digital channels are included within data.

Figure 2.8

Audio-visual consumption online and via mobile: Q1 2008 – Q1 2012

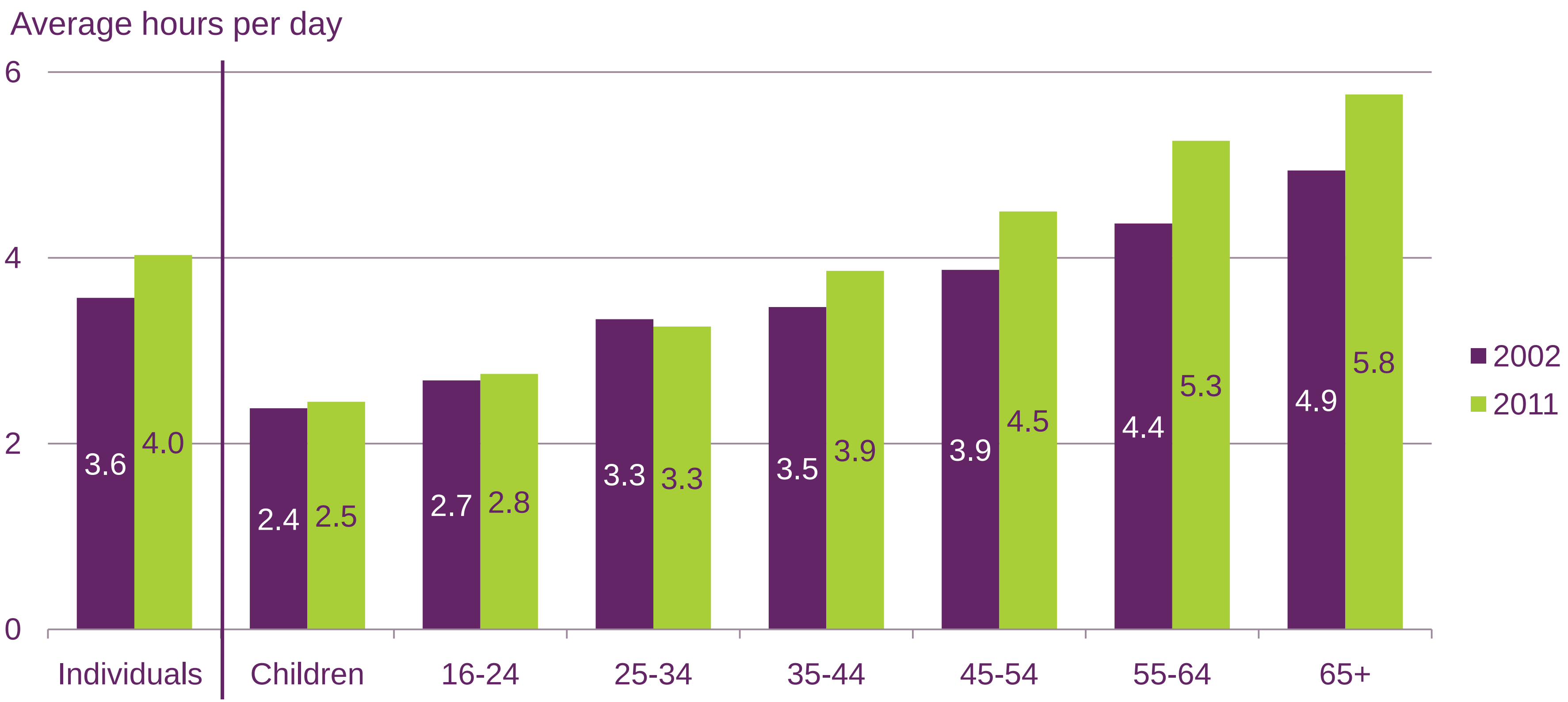


Source: Ofcom Technology Tracker. All adults 16+ (note - data has been re-based from all those with internet access and mobile phones respectively).Based on Q1 survey data for each respective year. Internet: Q - Which, if any, of these do you or members of your household use the internet for whilst at home? Mobile: Q - Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

* Data for internet responses from Q1 2008 are based on respondents stating 'watch TV programmes'

Figure 2.9

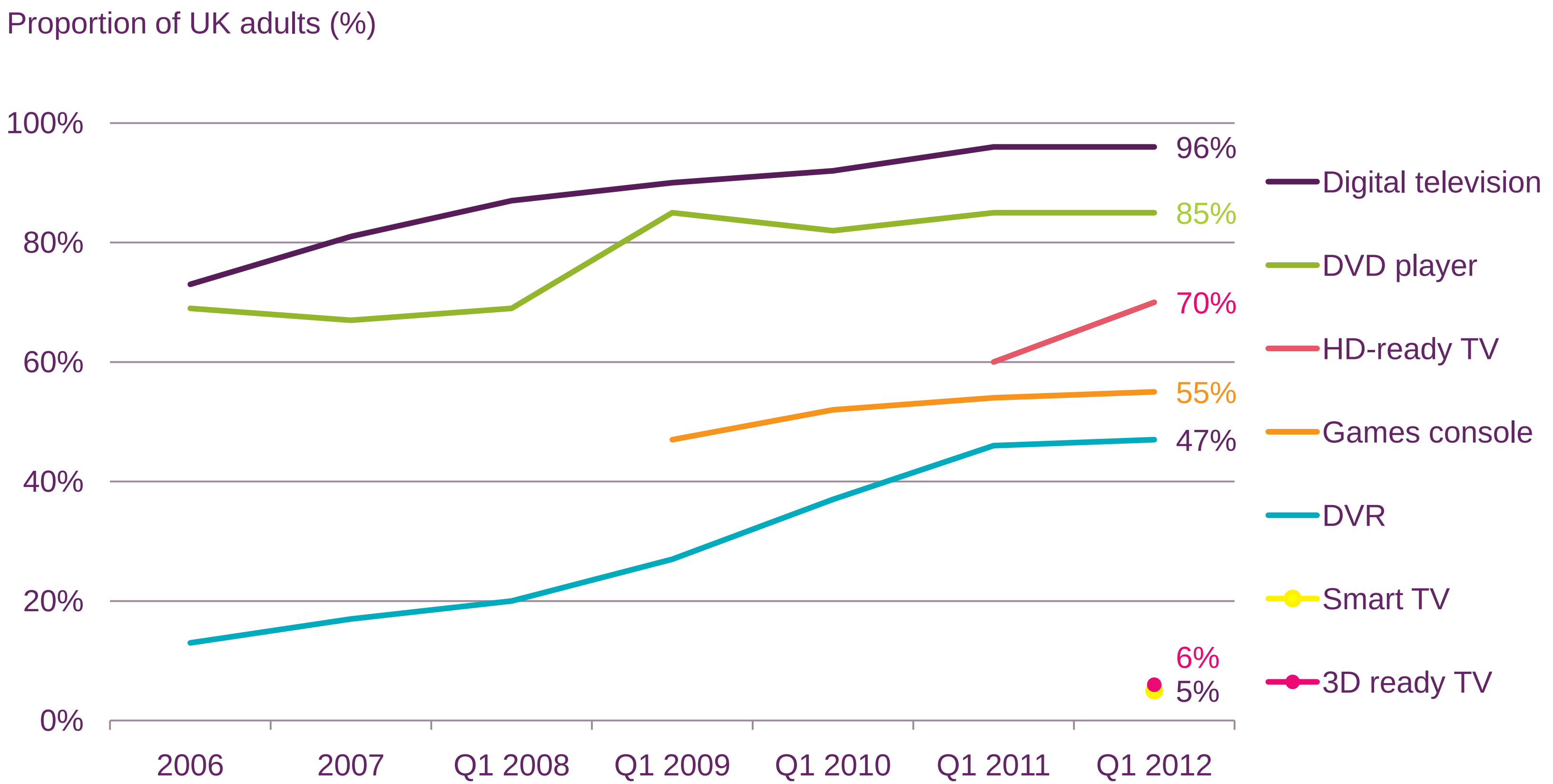
Average daily hours of TV viewing, by age: 2002 vs. 2011



Source: BARB, all homes. Individuals = 4+. Children = 4-15 years.
Note: New BARB panel introduced in 2010. As a result pre and post panel change data must be compared with caution.

Figure 2.10

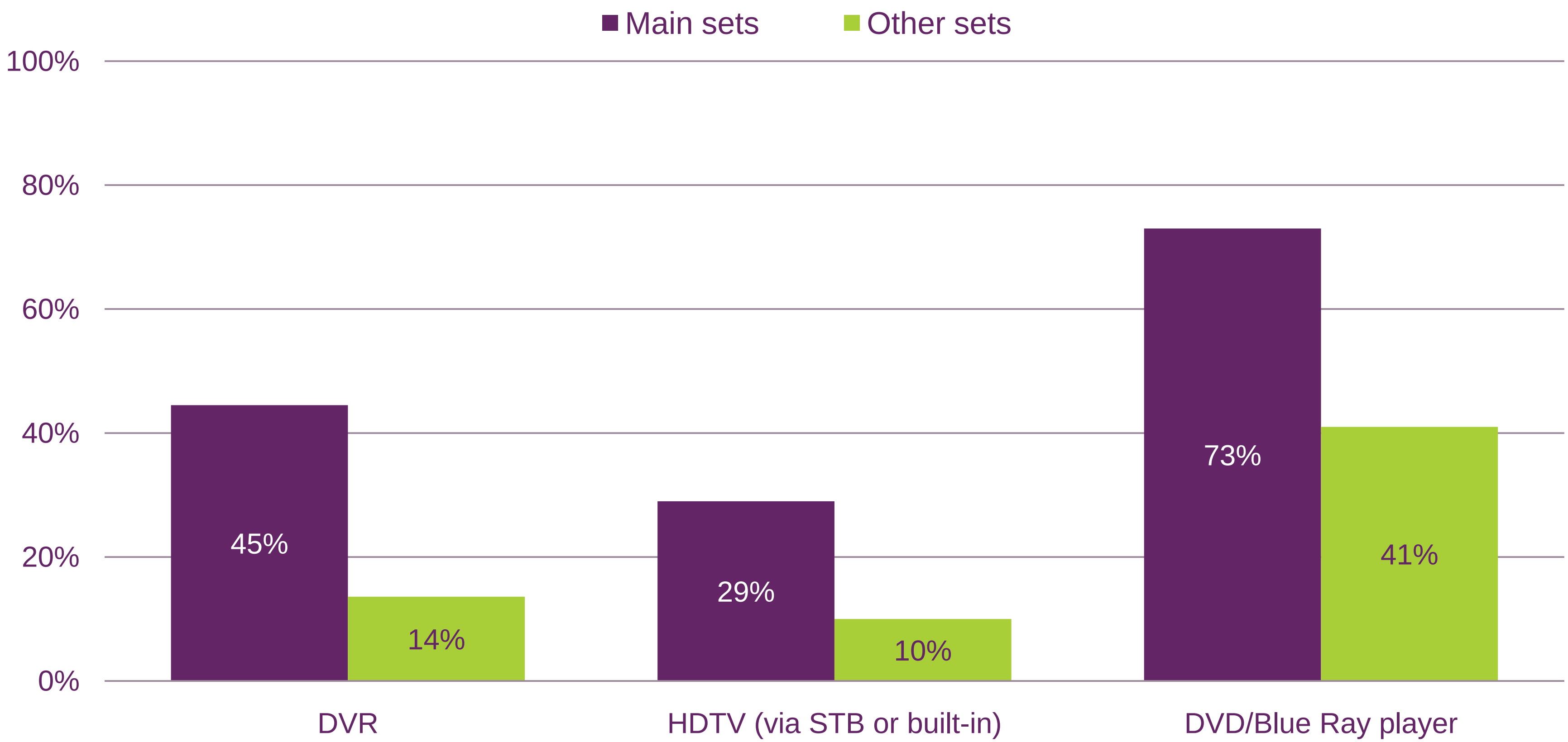
Take-up of audio-visual devices: 2006 – Q1 2012



Source: Ofcom Technology Tracker survey
Note: The Question wording for DVD Player and DVR was changed in Q1 2009 so data is not directly comparable with previous years.

Figure 2.11

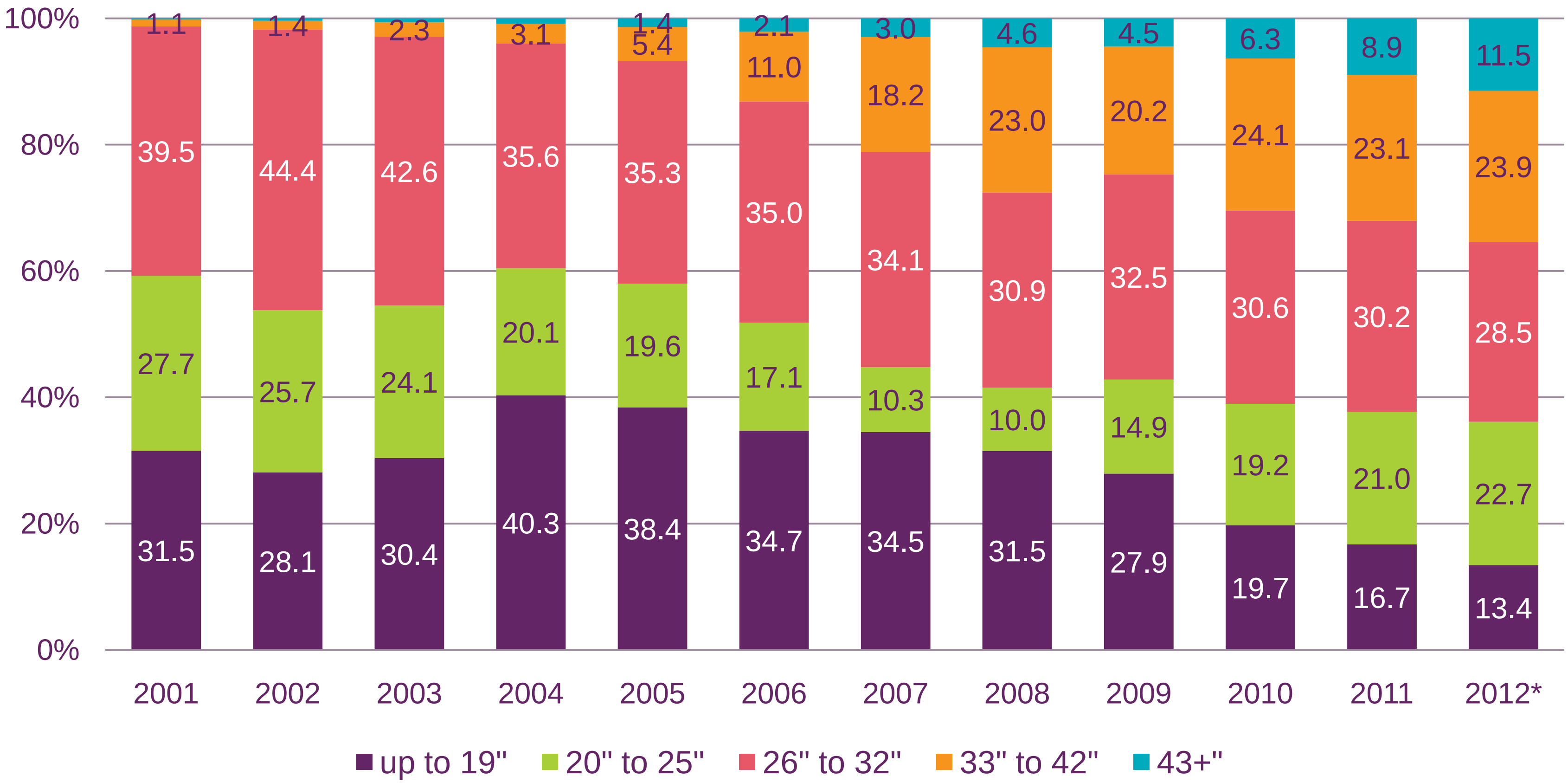
Ownership of TV device, main sets vs. other sets: 2011



Source: GfK NOP research ('Digital' data) taken from Ofcom's July 2011 DTV update report. Remaining data from BARB Establishment survey. Annual network report, Q2 2011. Data based on all UK TV households (= 98% of all UK households)

Figure 2.12

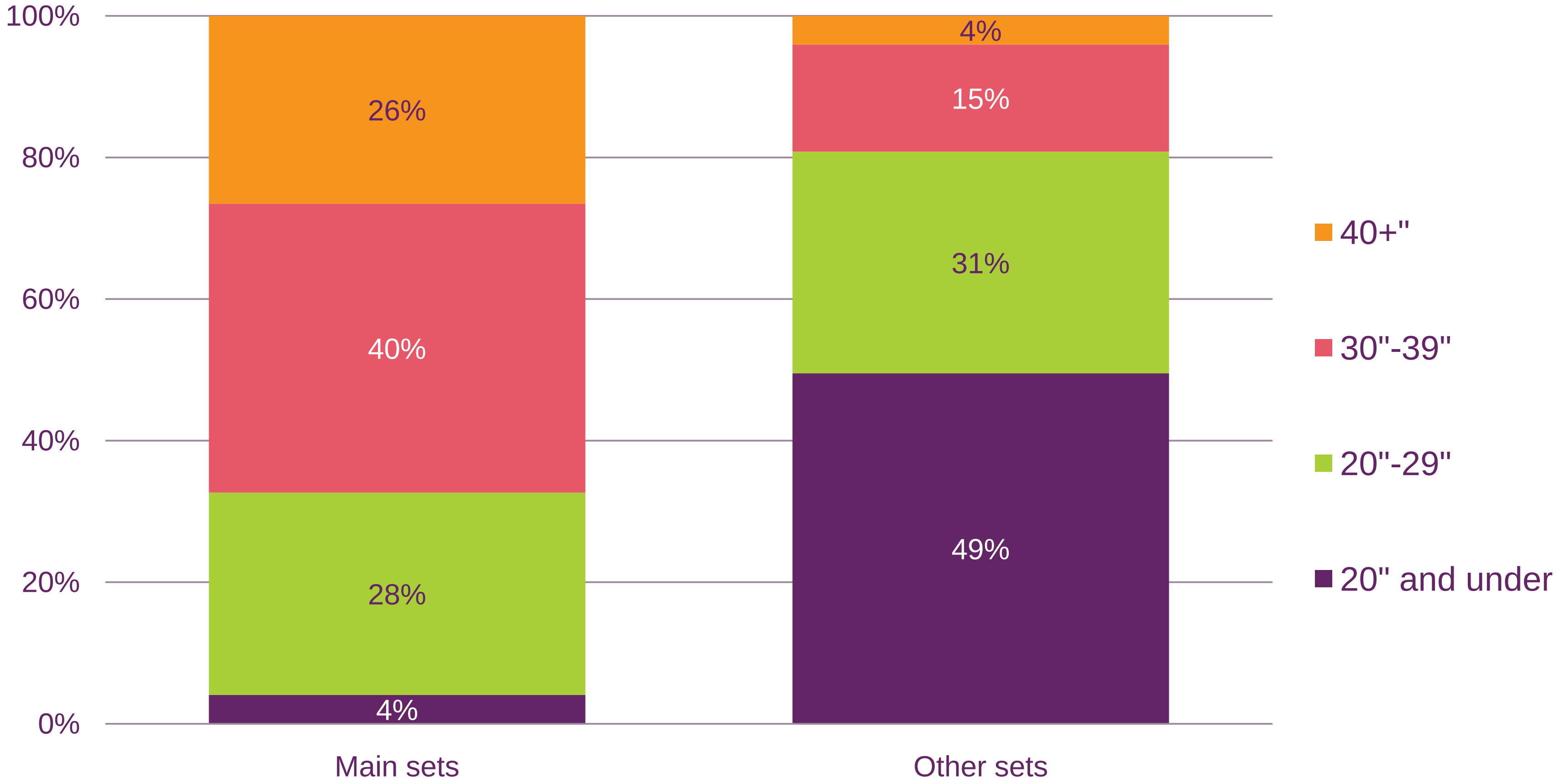
Percentage of TV sets sold, by screen size: 2001 – Q1 2012



Source: GfK sales data estimates. *2012 data represents Q1 only.

Figure 2.13

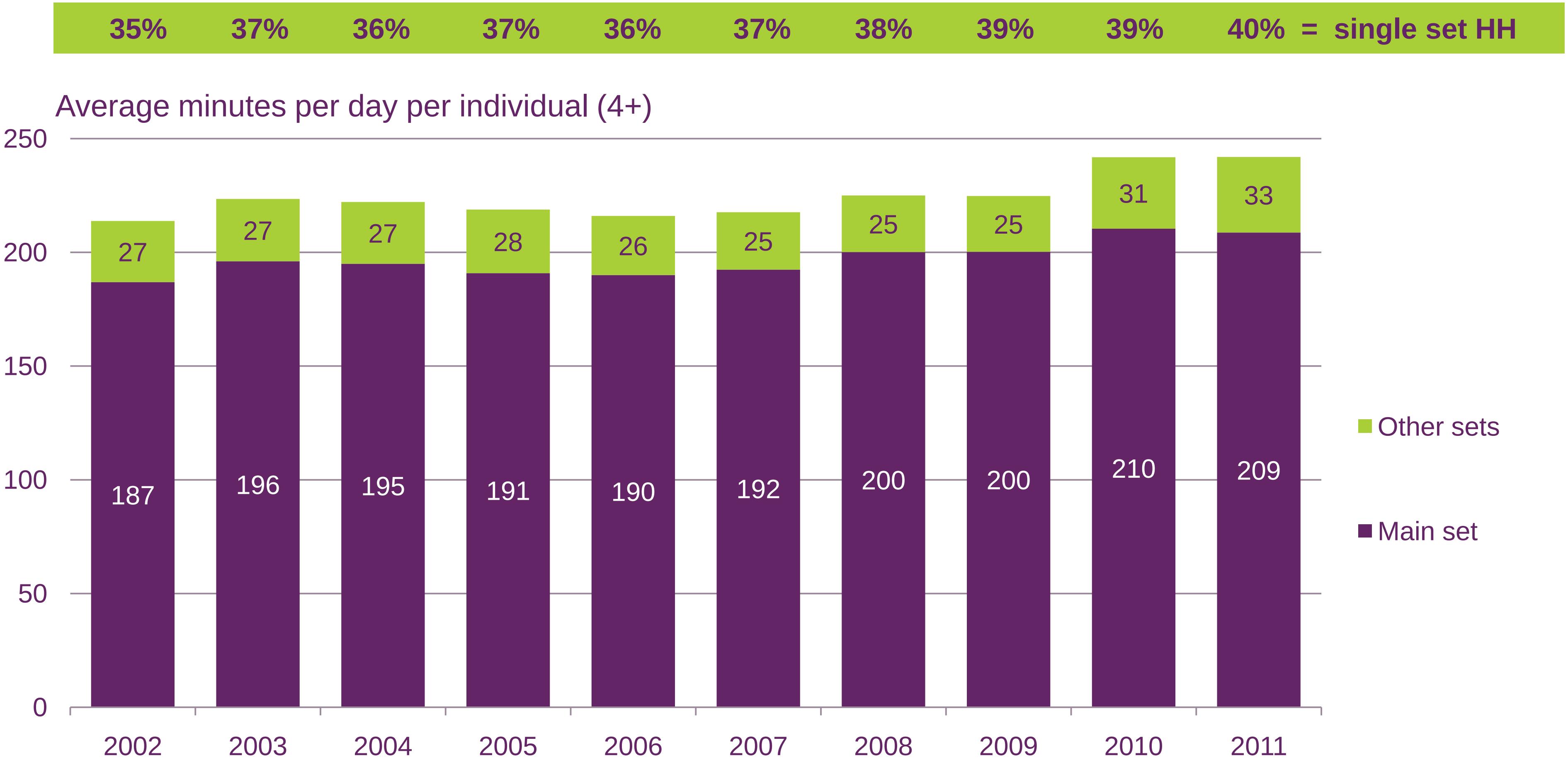
Main sets vs. other sets, by screen size: 2011



Source: BARB Establishment survey. Annual network report for Q2 2011. Set level profile data based on all UK TV households (= 98% of all UK households).

Figure 2.14

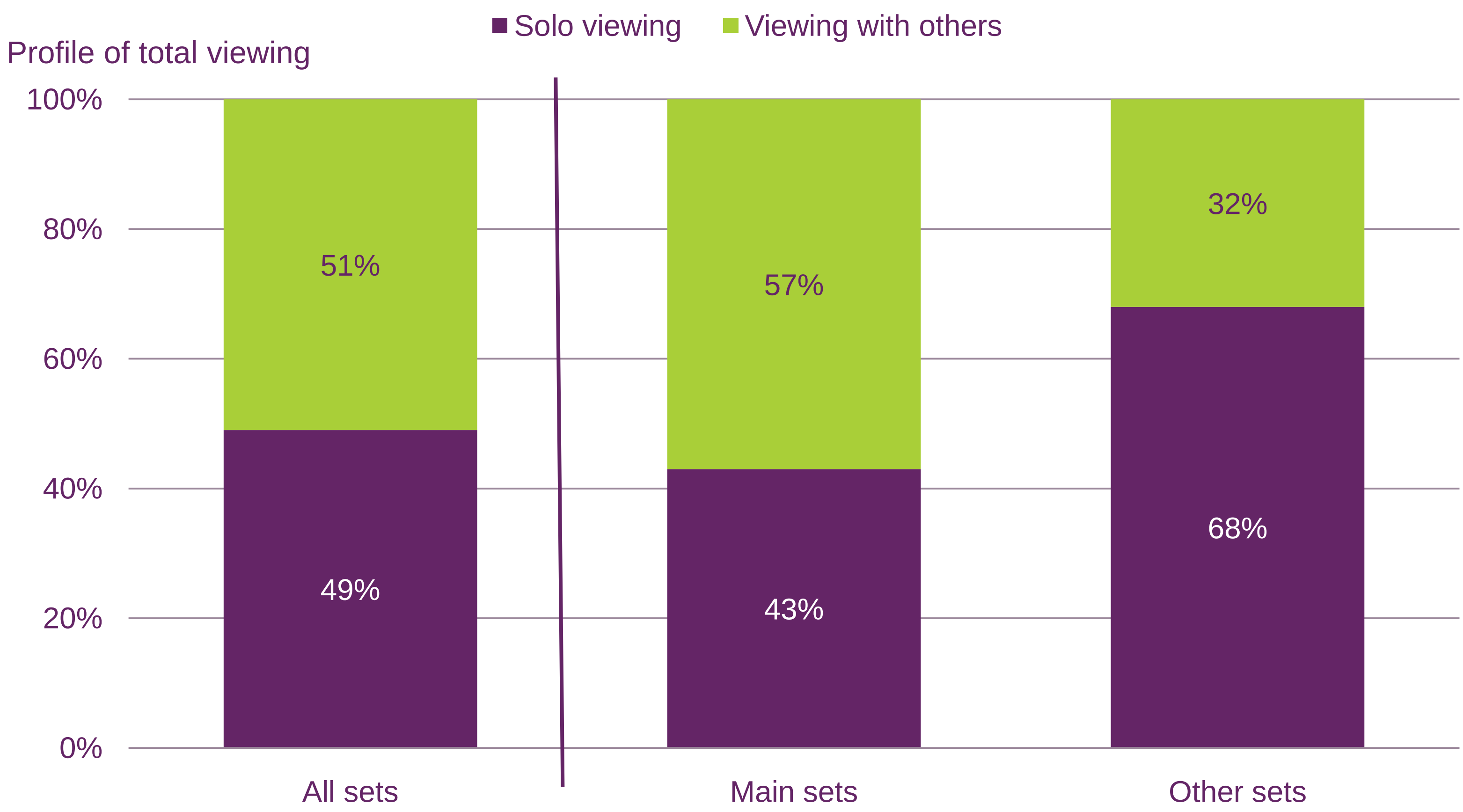
Total TV viewing, main sets vs. other sets: 2002 - 2011



Source: BARB, all individuals (4+), all homes. BARB Establishment Surveys – Annual Network Q2 reports. Note: i) New BARB panel introduced in 2010. As a result, pr- and post-panel change data must be compared with caution. ii) 'Main set' defined as set located in the living room. 'Other sets' defined as all other TV sets in the home.

Figure 2.15

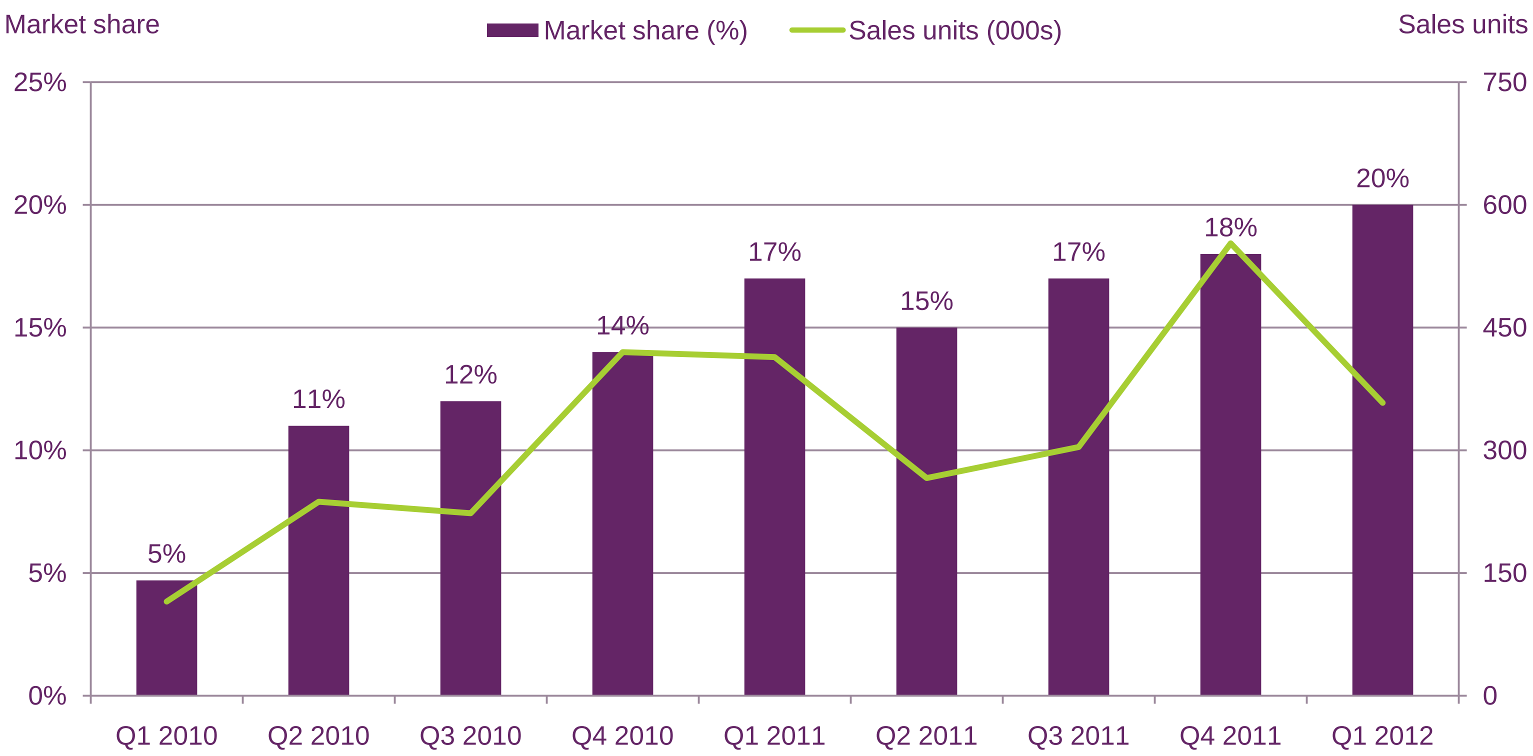
Solo viewing and shared viewing in multi-set households – main sets vs. other sets: 2011



Source: BARB, all individuals (4+). Based on multi-set households.

Figure 2.16

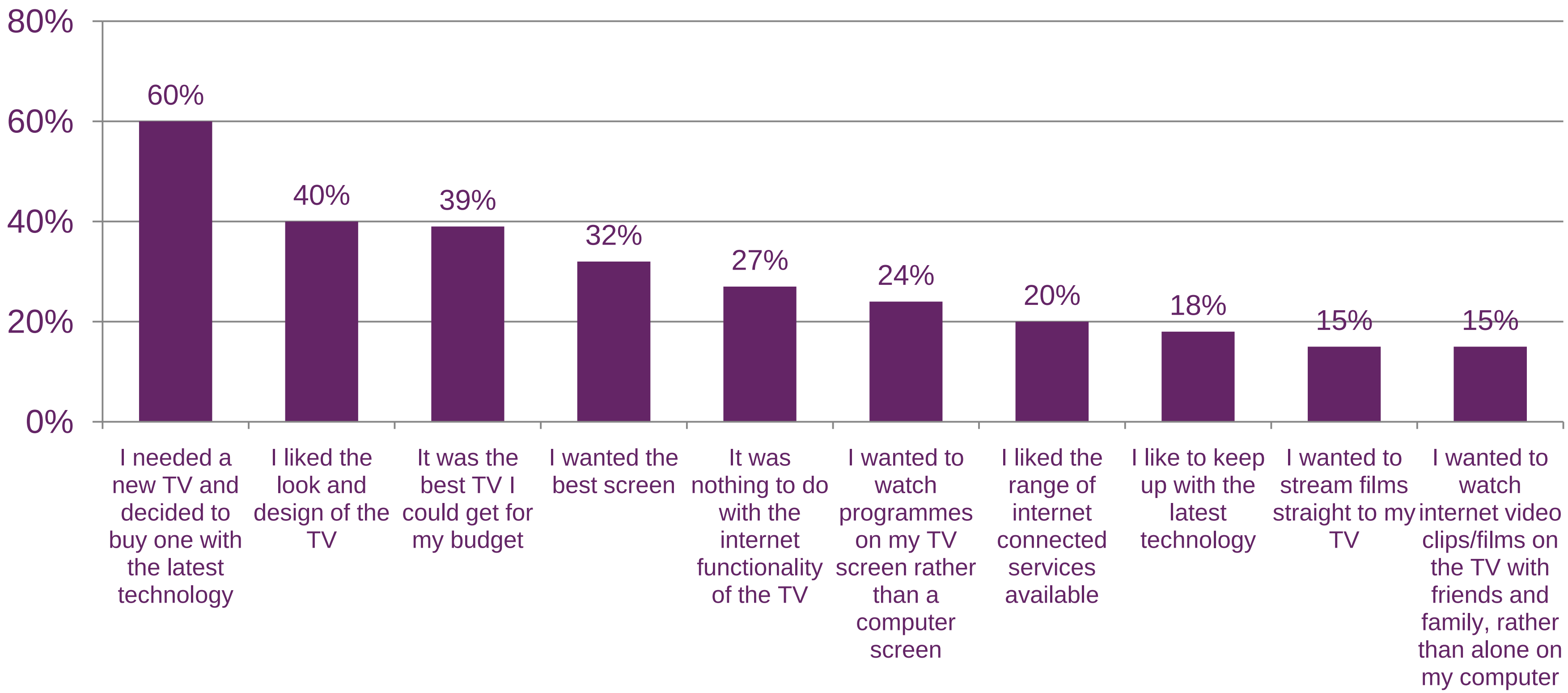
Smart TV sales and market share



Source: GFK sales estimates

Figure 2.17

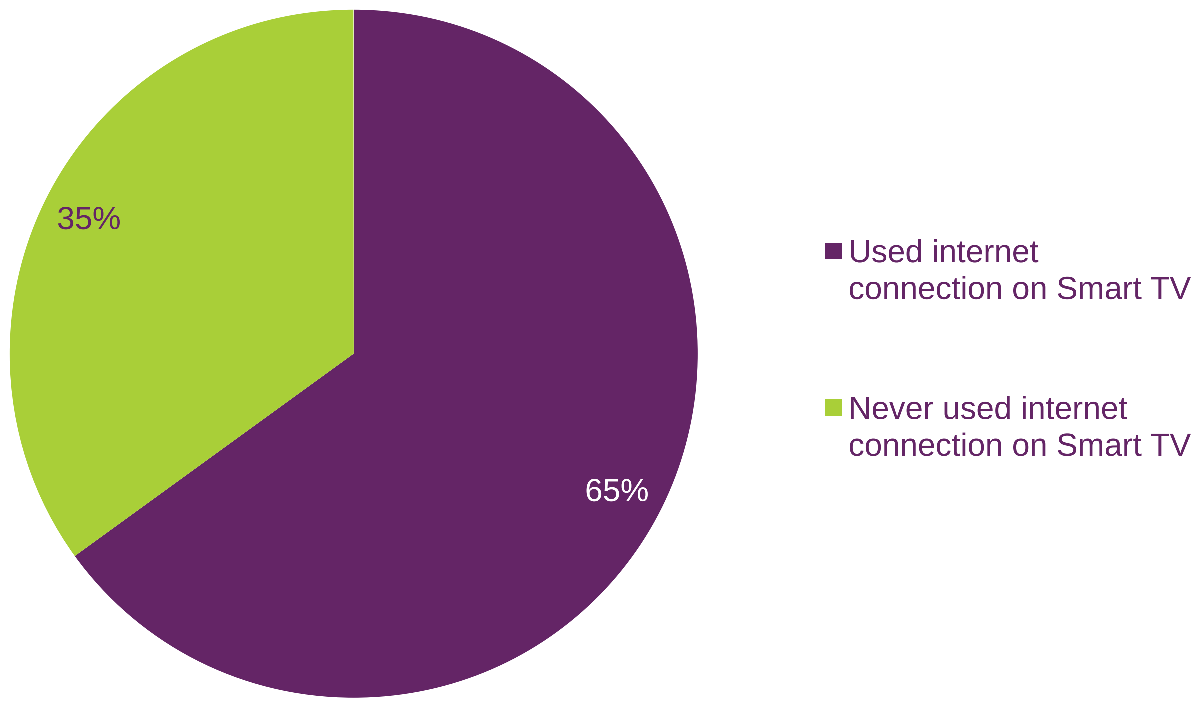
Reasons people buy a smart TV



Source: Ofcom research, fieldwork carried out by Populus, March to April 2012. Q.D6 Why did you decide to buy your Smart TV? (Multicoded). Base: All respondents with a smart TV (252)

Figure 2.18

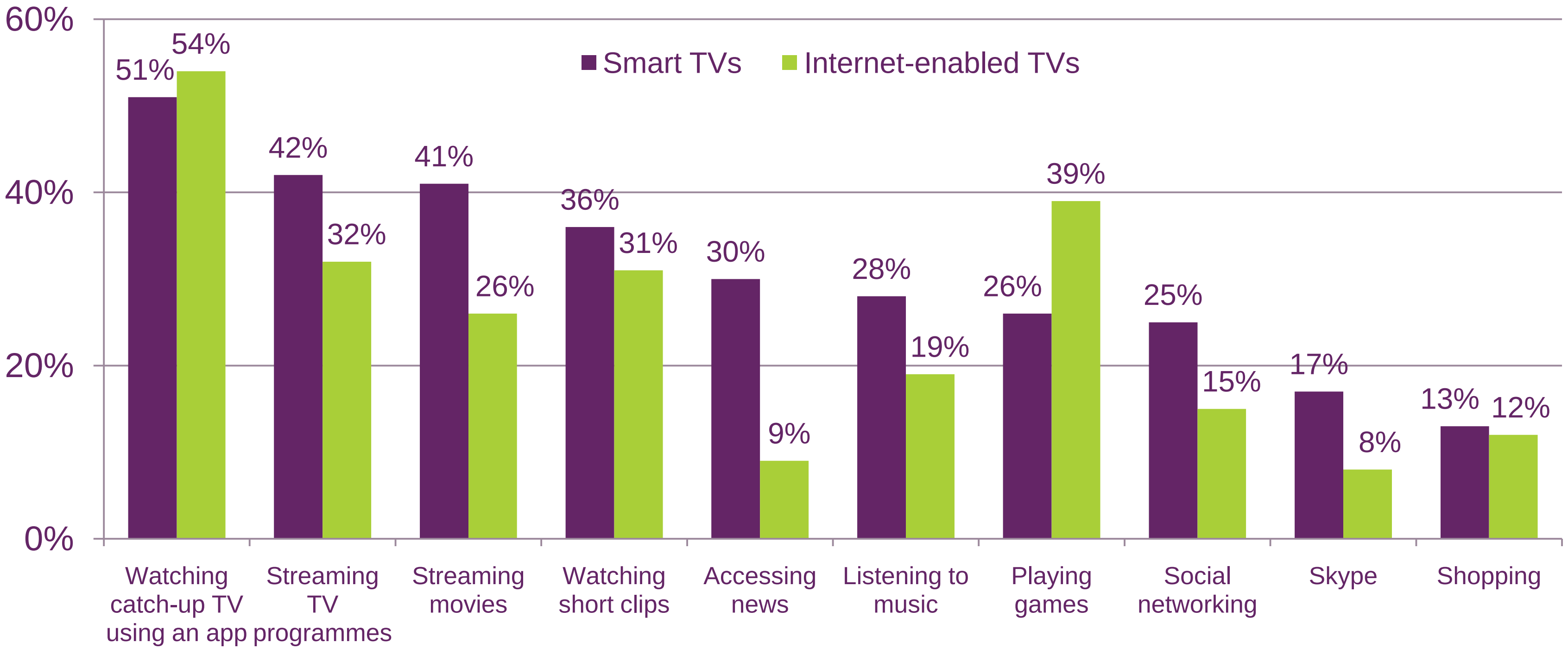
Consumers' use of internet connection on smart TVs



Source: Ofcom research, fieldwork carried out by Populus, March to April 2012. Q.D7 Have you ever used the internet connection on your Smart TV? Base: All respondents with a smart TV (252)

Figure 2.19

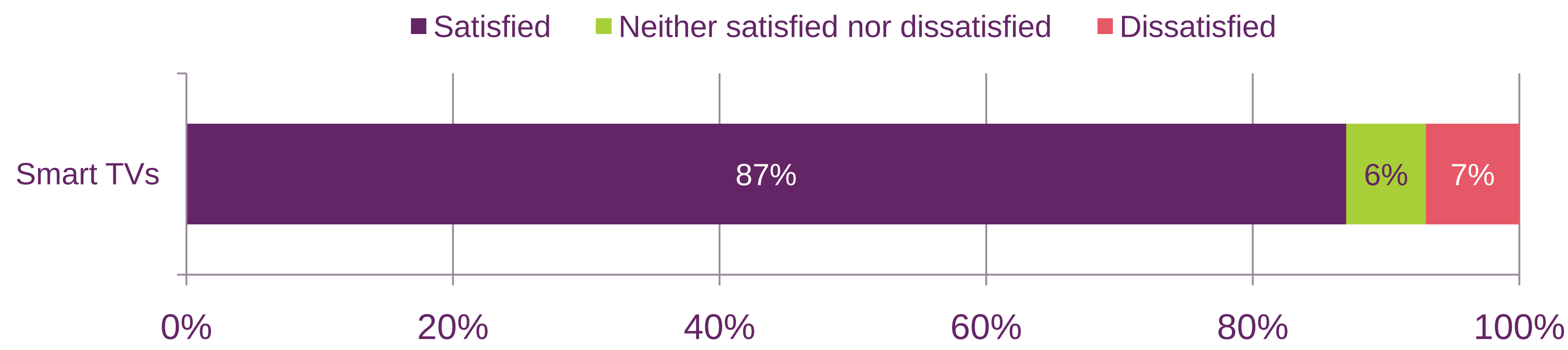
Activities undertaken on smart TVs and internet-enabled TVs



Source: Ofcom research, fieldwork carried out by Populus, March to April 2012. (1) Q.D8 What do you use the internet functionality on your Smart TV for? (Multicoded) (2) When you connect your TV to the internet, what do you tend to do online? (Multicoded)
Base: (1) All respondents who have used the internet functionality on their Smart TV (165) (2) All respondents with an internet-enabled TV (250)

Figure 2.20

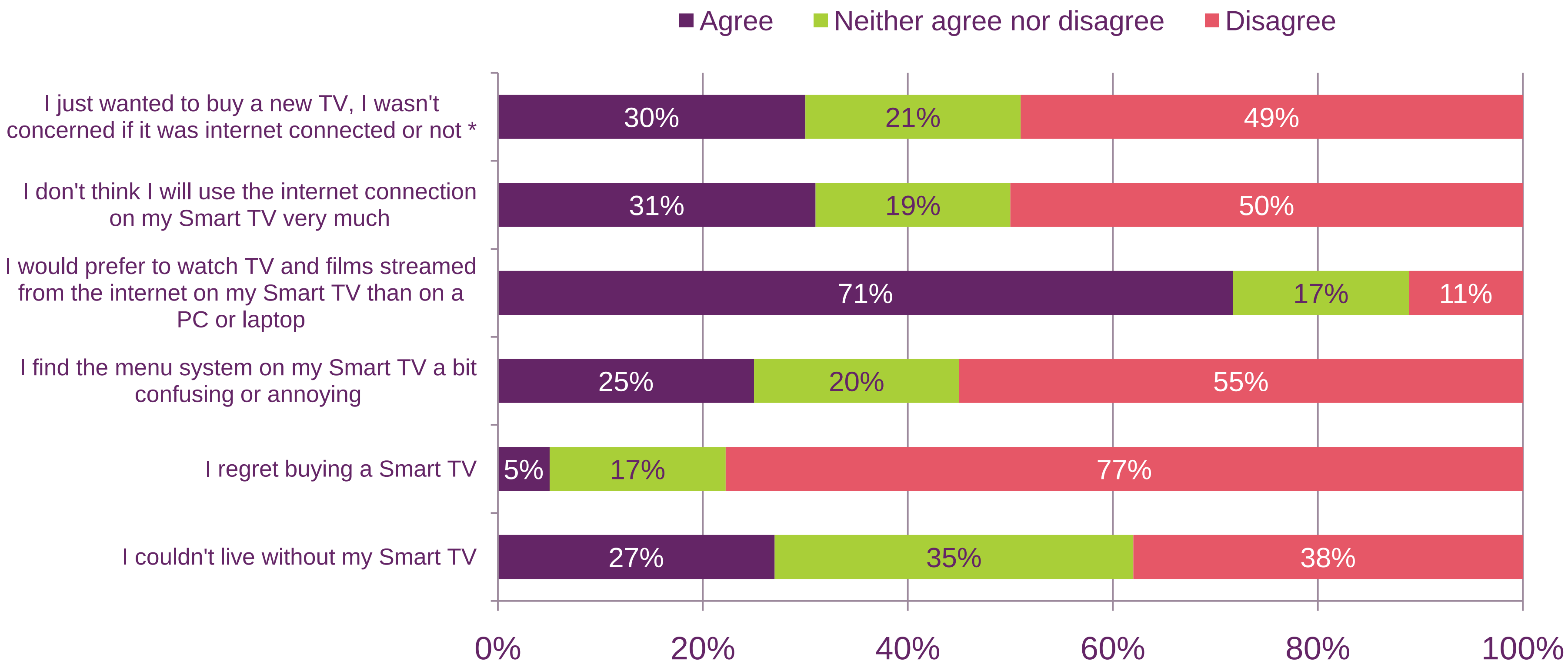
Levels of satisfaction with smart TVs



Source: Ofcom research, fieldwork carried out by Populus, March to April 2012. (1) Q.D2 Taking all things into account, how satisfied or dissatisfied are you with your Smart TV? (2) Q.E3 Taking all things into account, how satisfied or dissatisfied are you with the experience of connecting your TV to the internet?
Base: (1) All respondents who have used the internet functionality on their Smart TV (165) (2) All respondents with an internet-enabled TV (250)

Figure 2.21

Attitudes towards Smart TVs

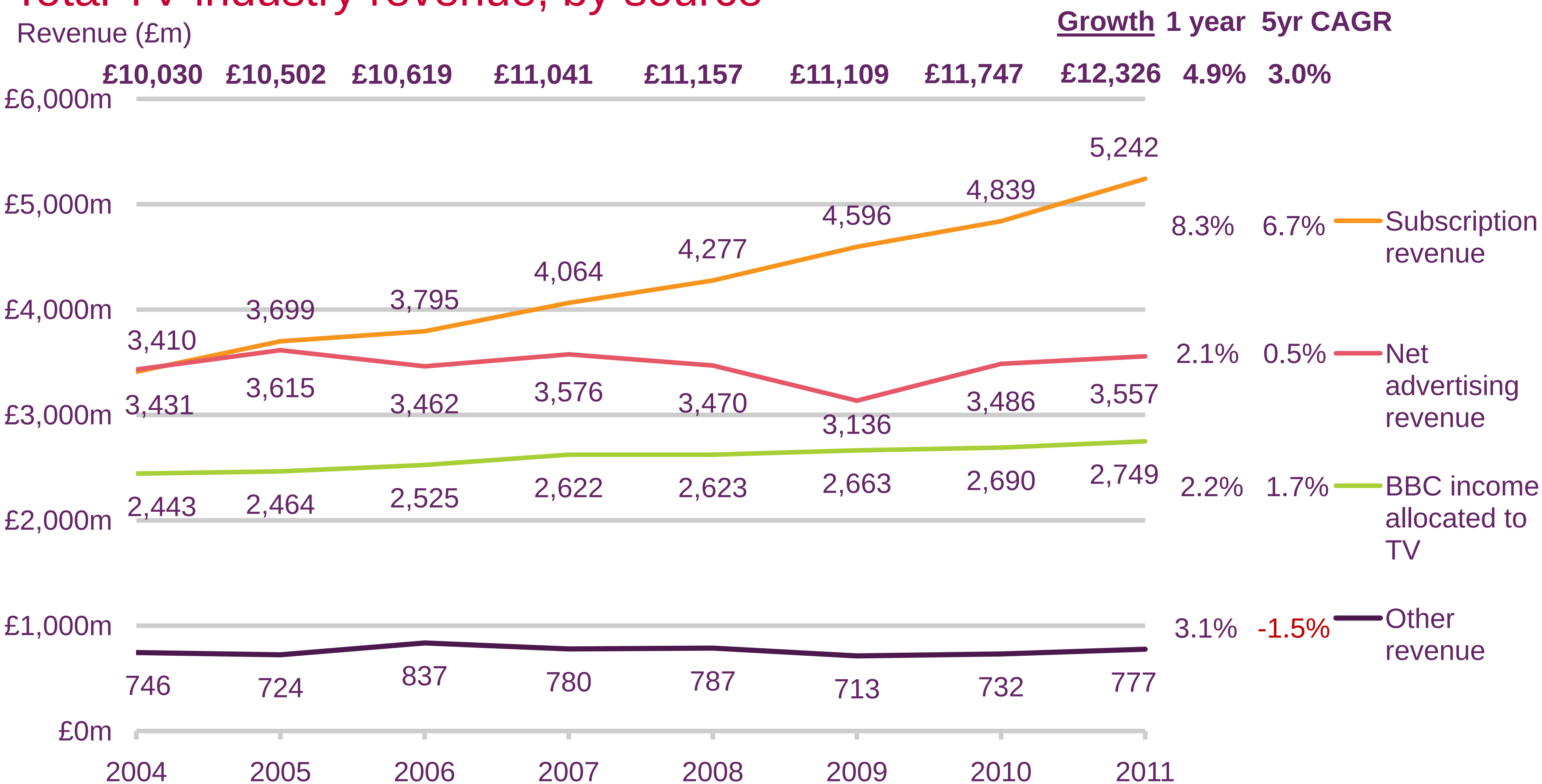


Source: Ofcom research, fieldwork carried out by Populus, March to April 2012. Q.D16 To what extent do you agree or disagree with the following statements?
Base: All respondents who have used the internet functionality on their Smart TV (165)
Note: * Among all respondents with a Smart TV (252), 47% agreed, 35% disagreed and17% neither agreed nor disagreed

1. TV AND AV INDUSTRIES

Figure 2.22

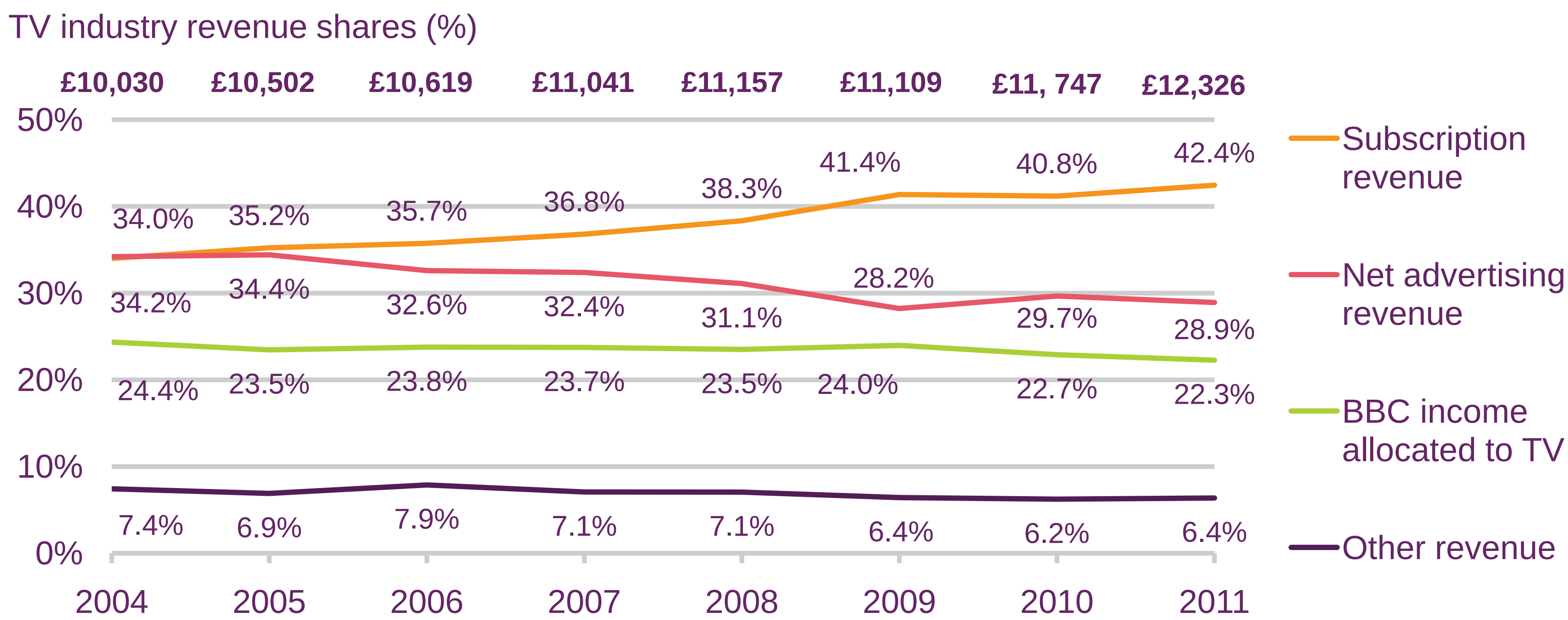
Total TV industry revenue, by source



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, sponsorship, interactive (including premium-rate telephony services), programme sales and S4C's grant from the DCMS. The BBC re-stated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

Figure 2.23

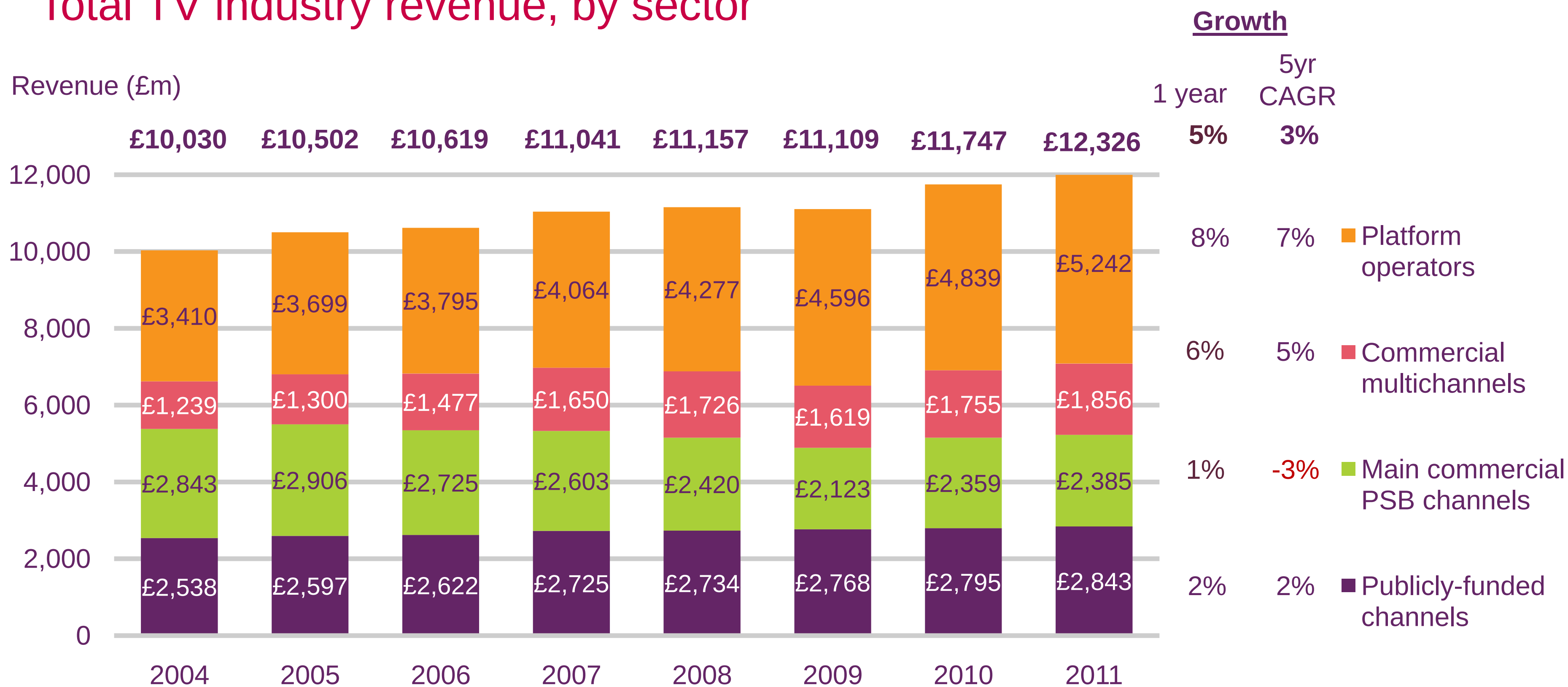
TV industry revenues, by share



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 re-stated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

Figure 2.24

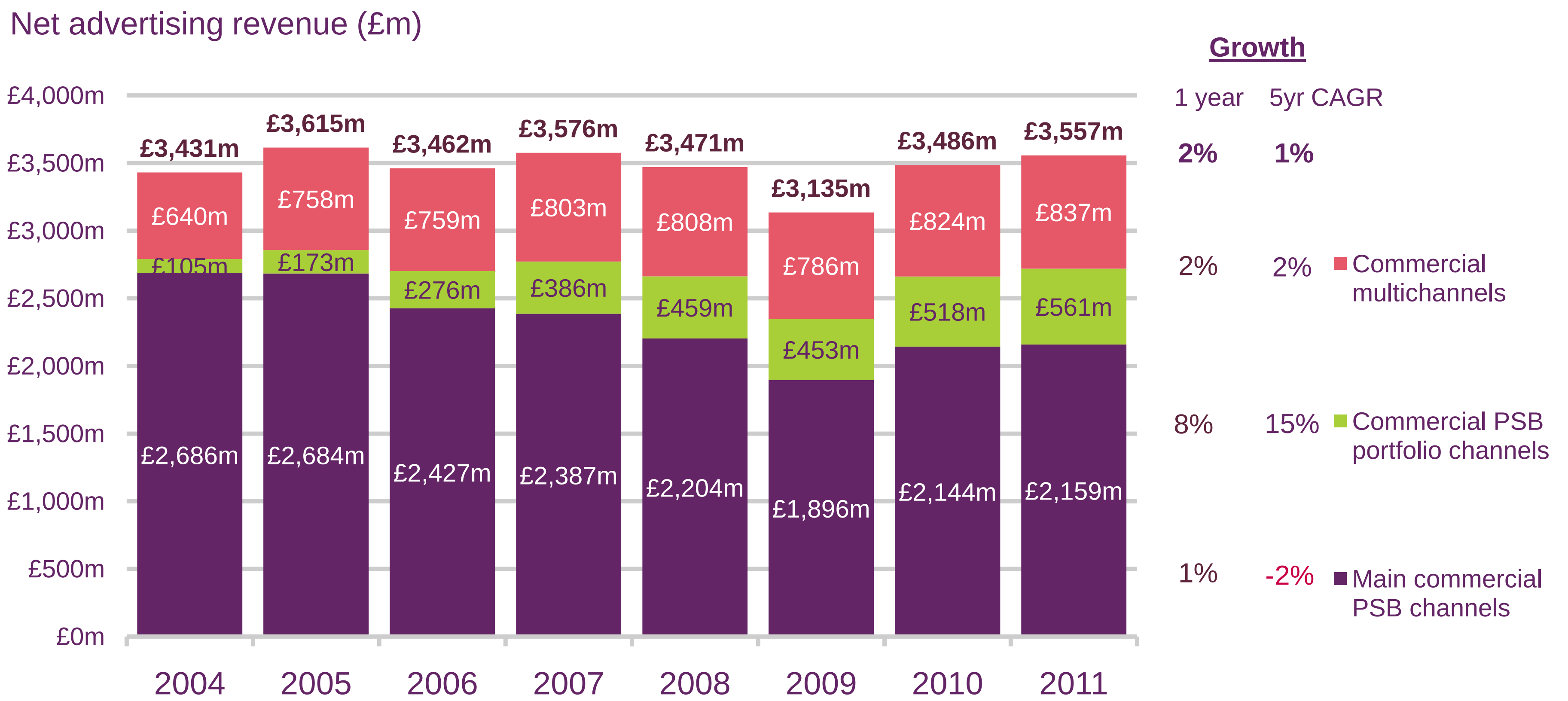
Total TV industry revenue, by sector



Source: Ofcom/broadcasters. Note: Figures are nominal. Main commercial PSB channels comprise ITV/ITV Breakfast, STV, UTV, Channel Television, Channel 4, Channel 5 and S4C. Commercial multichannels comprise all multichannels including those owned by ITV1, Channel 4 and Channel 5. 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 re-stated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

Figure 2.25

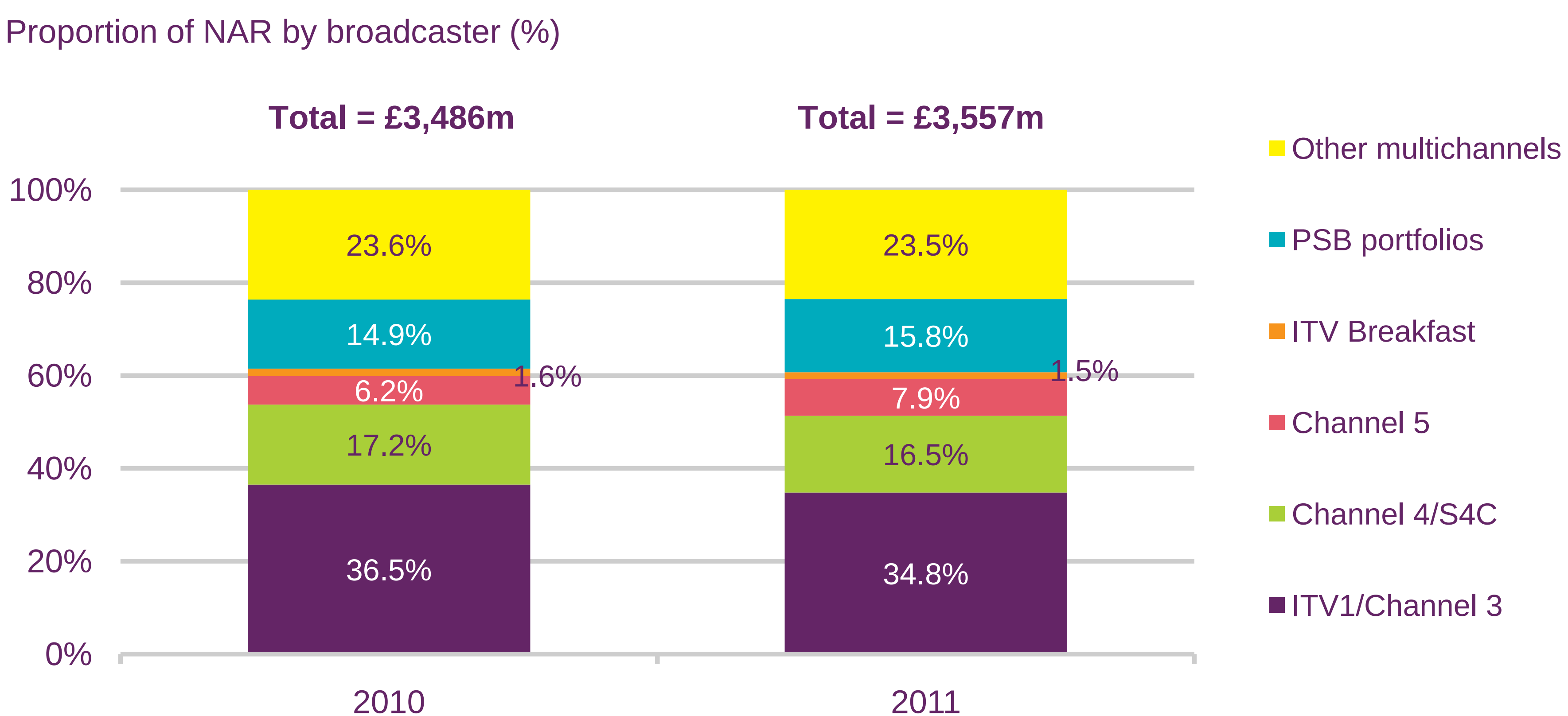
TV net advertising revenues, by source



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, ITV Breakfast, Channel 4, Channel 5 and S4C; Commercial PSB portfolio channels include, where relevant, ITV2, 3, 4, CiTV, E4, More 4, Film 4, 4Music, Five USA and 5* (and their ‘+1’ channels). For previous years closed channels have also been included. Sponsorship revenue not included. Totals may not equal the sum of the components due to rounding.

Figure 2.26

TV net advertising revenue market shares: 2010 - 2011

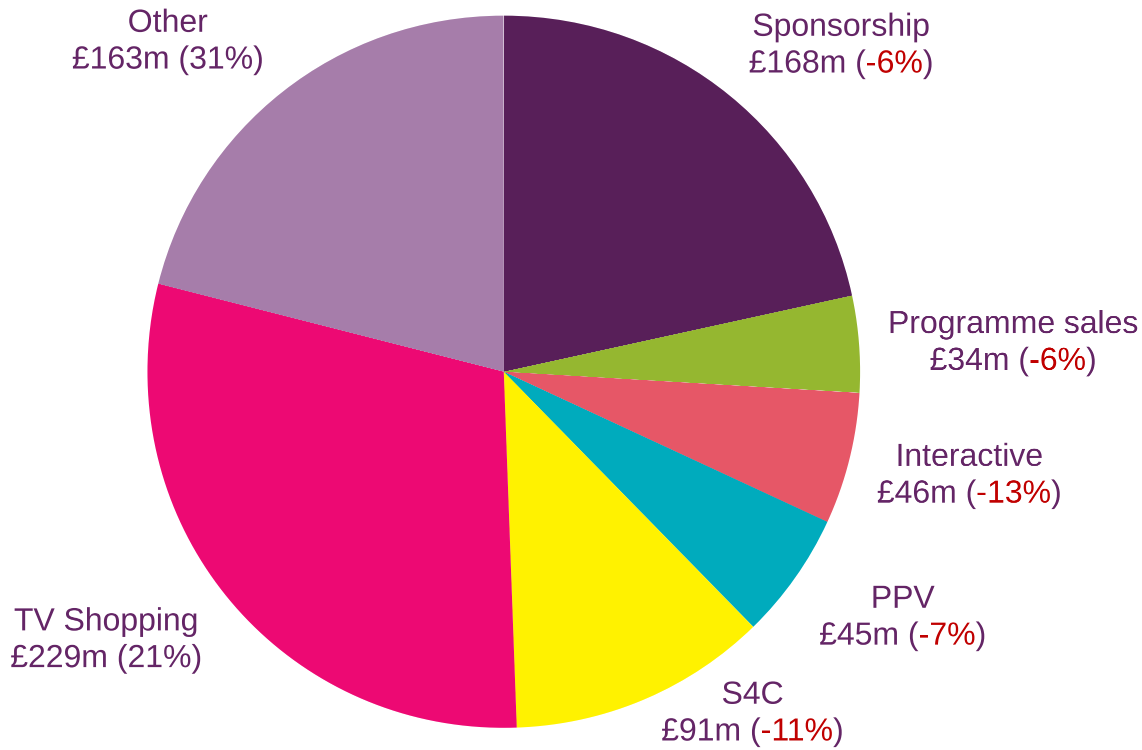


Source: Ofcom/broadcasters. Note: ITV1/Channel 3 includes ITV1, STV, UTV and Channel Television.

Figure 2.27

Breakdown of other / non-broadcast revenue: 2011

Total non-broadcast revenue = £777m (6%)

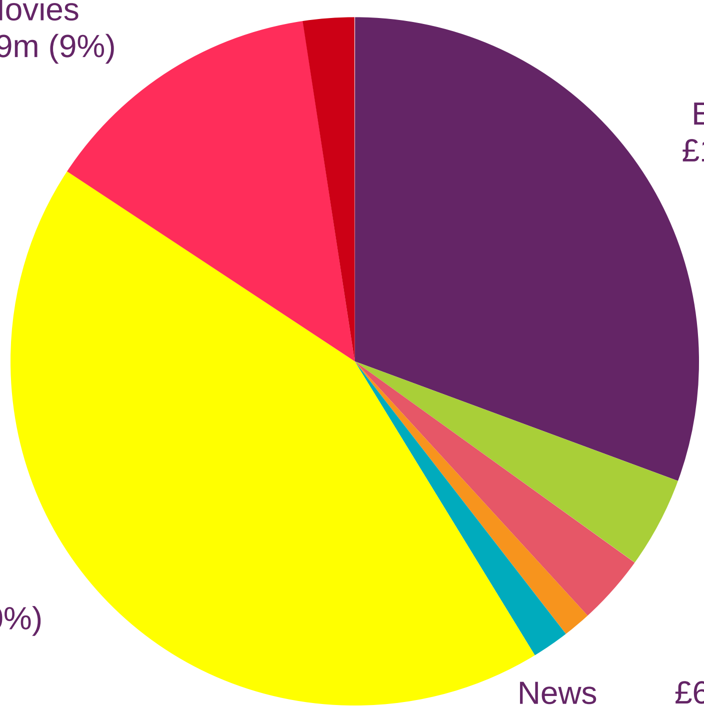


Source: Ofcom/broadcasters. Note: Percentage figures in brackets represent year-on-year change for total non-broadcast revenue versus 2010. TV shopping represents aggregate operating margin of products sold via television. Totals may not equal the sum of the components due to rounding. Owing to the nature of these revenue components, annual changes may be a function of a higher number of broadcaster returns being made by the time of writing, rather than material changes in the contributions that these revenue components are making to total industry income.

Figure 2.28

Revenue generated by multichannel broadcasters, by genre: 2011

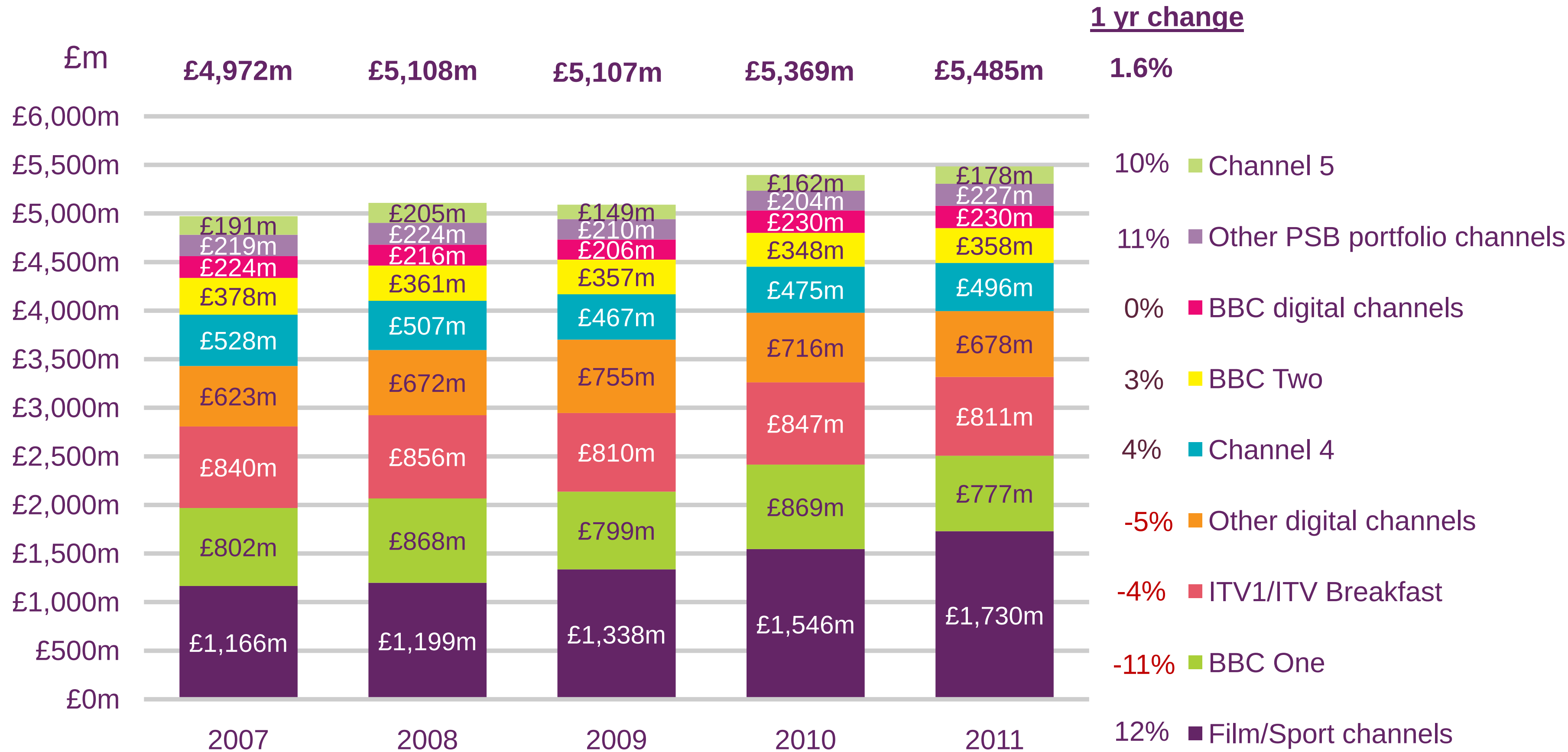
Total revenue = £4,580m across the eight genres included



Source: Ofcom/broadcasters. Note: Percentage figures in brackets represent year-on-year change for total revenue compared to 2010. 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 1.22 plus wholesale subscriber payments from platform operators.

Figure 2.29

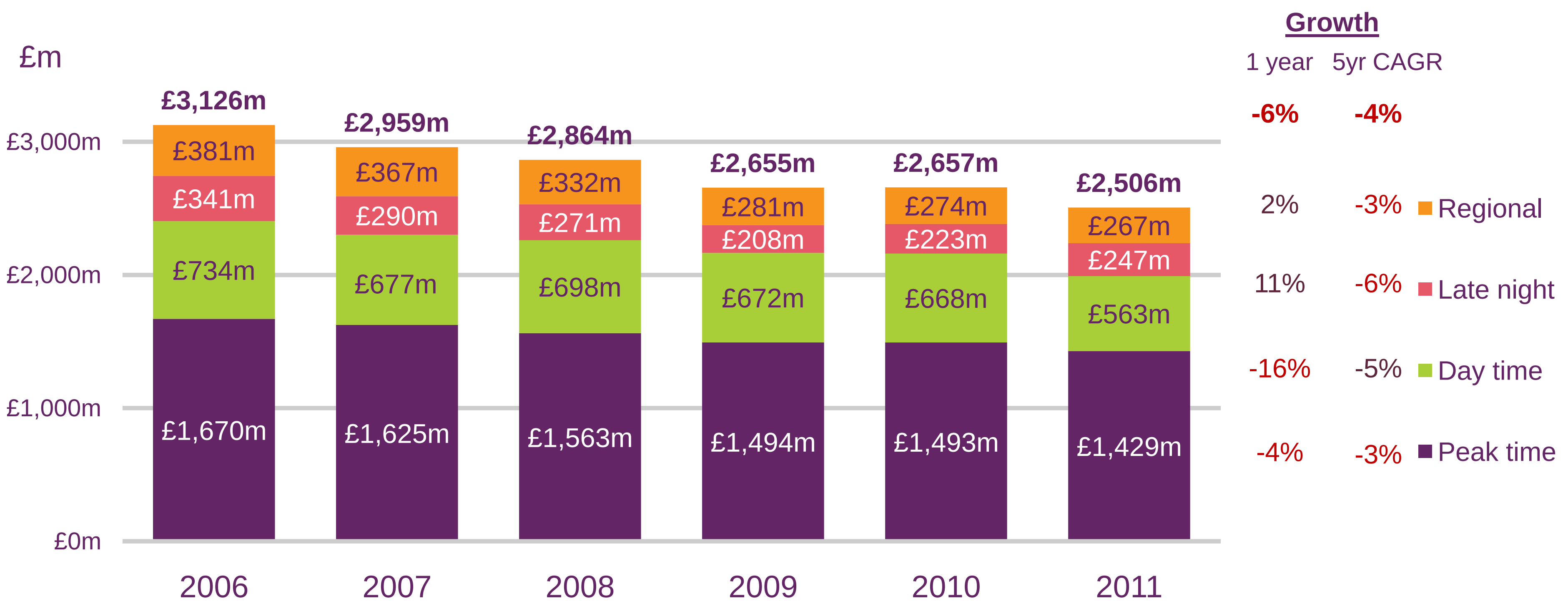
Spend on network TV programmes: 2007 - 2011



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 first-run acquired programmes, spend on rights and on repeats (originations or acquisitions).

Figure 2.30

Spend on first-run originated output on the five main networks



Source: Ofcom/broadcasters. Note: Figures are expressed in 2011 prices. They include ITV Breakfast, 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

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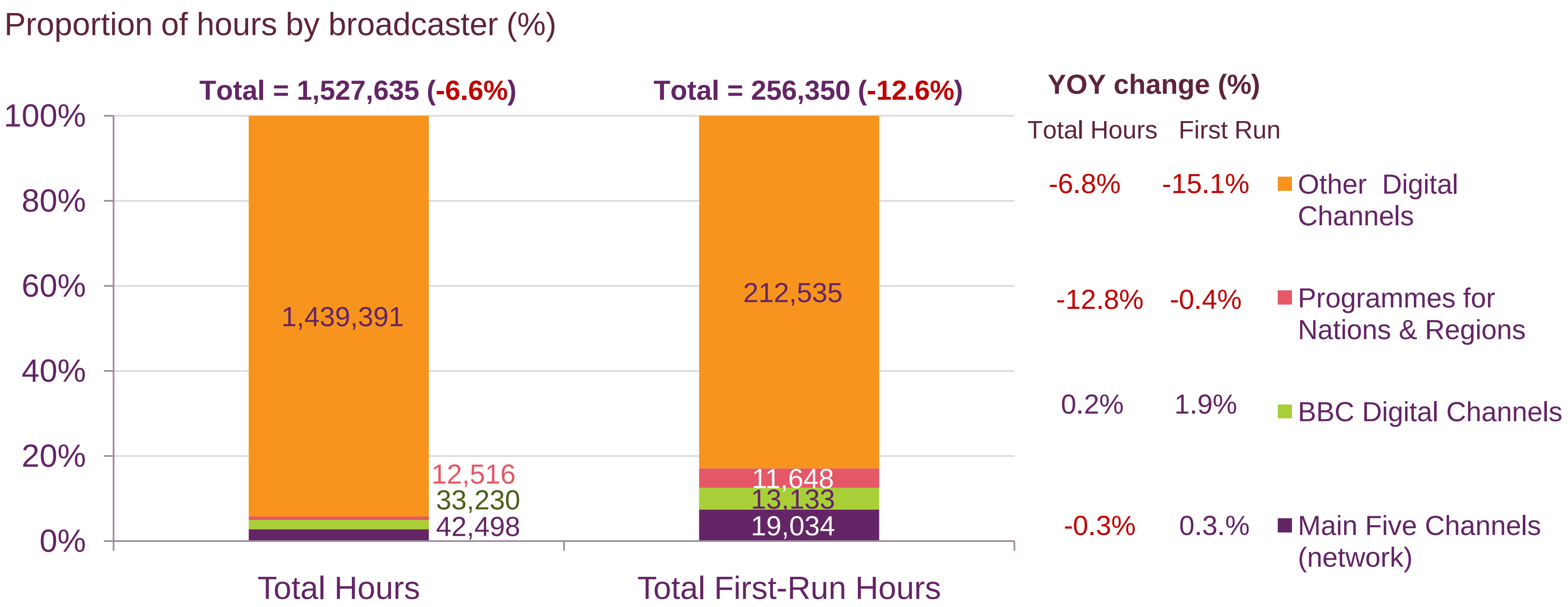
Figure 2.31

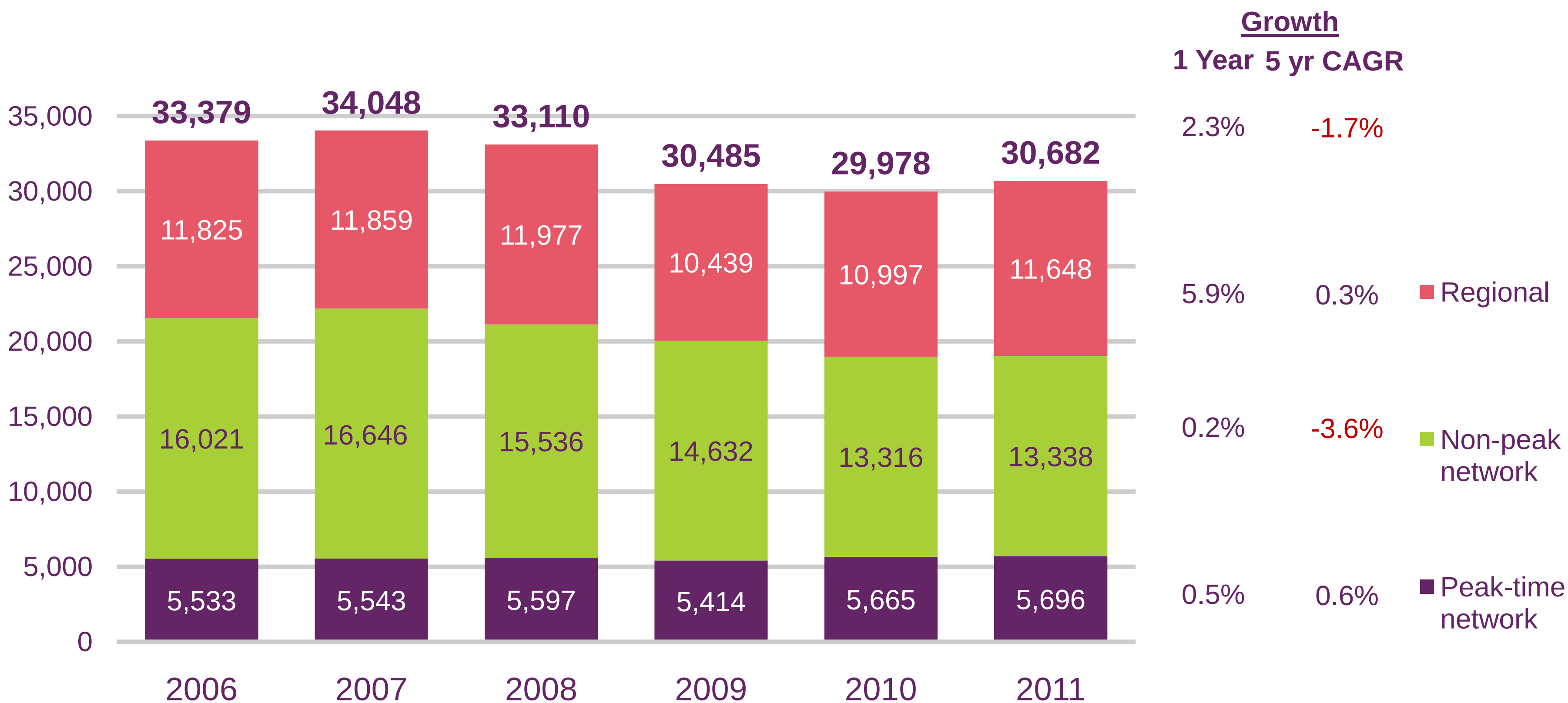
Total and first-run originated hours of output, all day: 2011



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. ITV Breakfast 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 include a small proportion of Irish-language programmes.

Figure 2.32

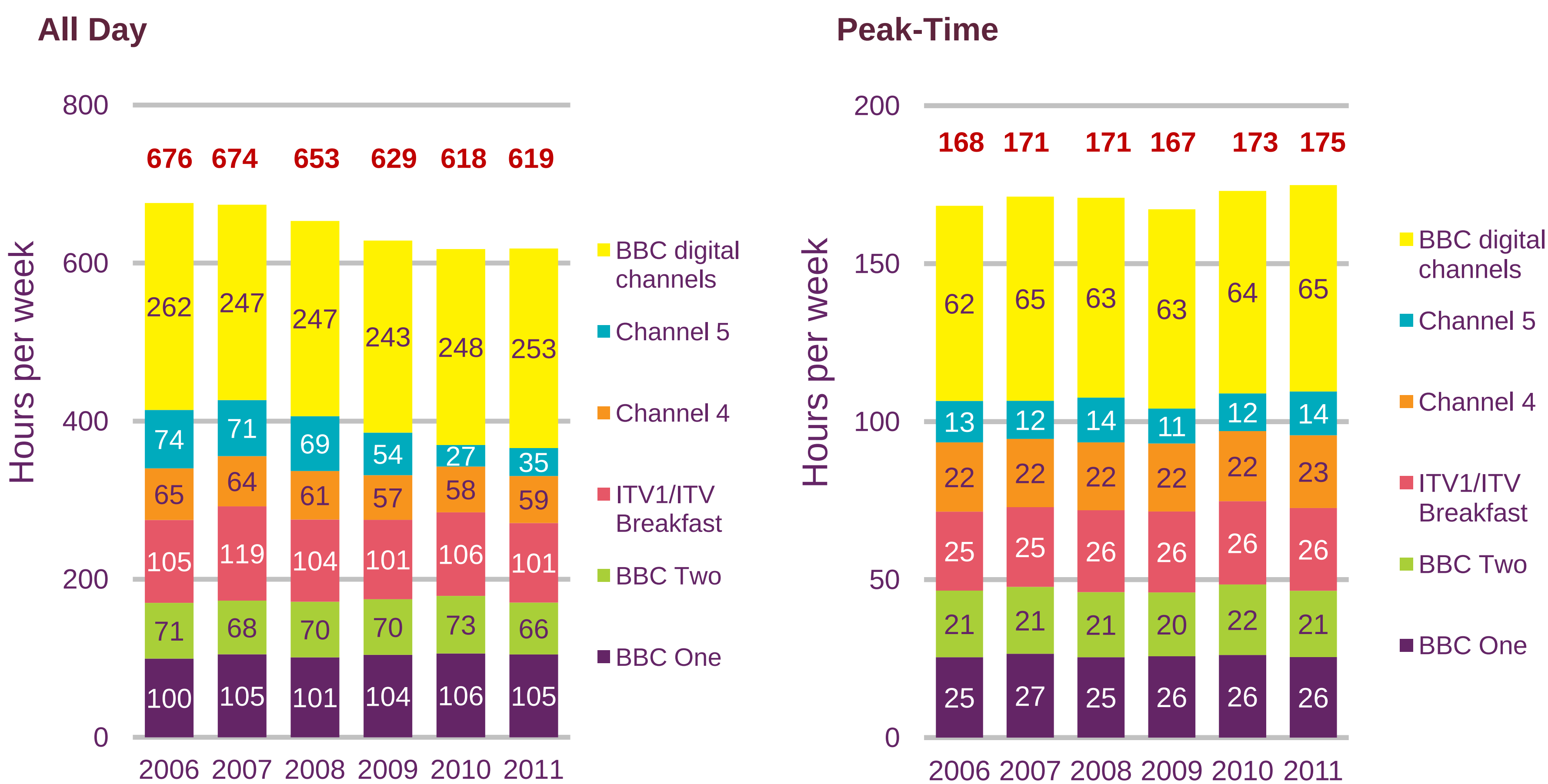
Hours of first-run originated output on the five main channels



Source: Ofcom/broadcasters. Note: Figures include ITV Breakfast 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.

Figure 2.33

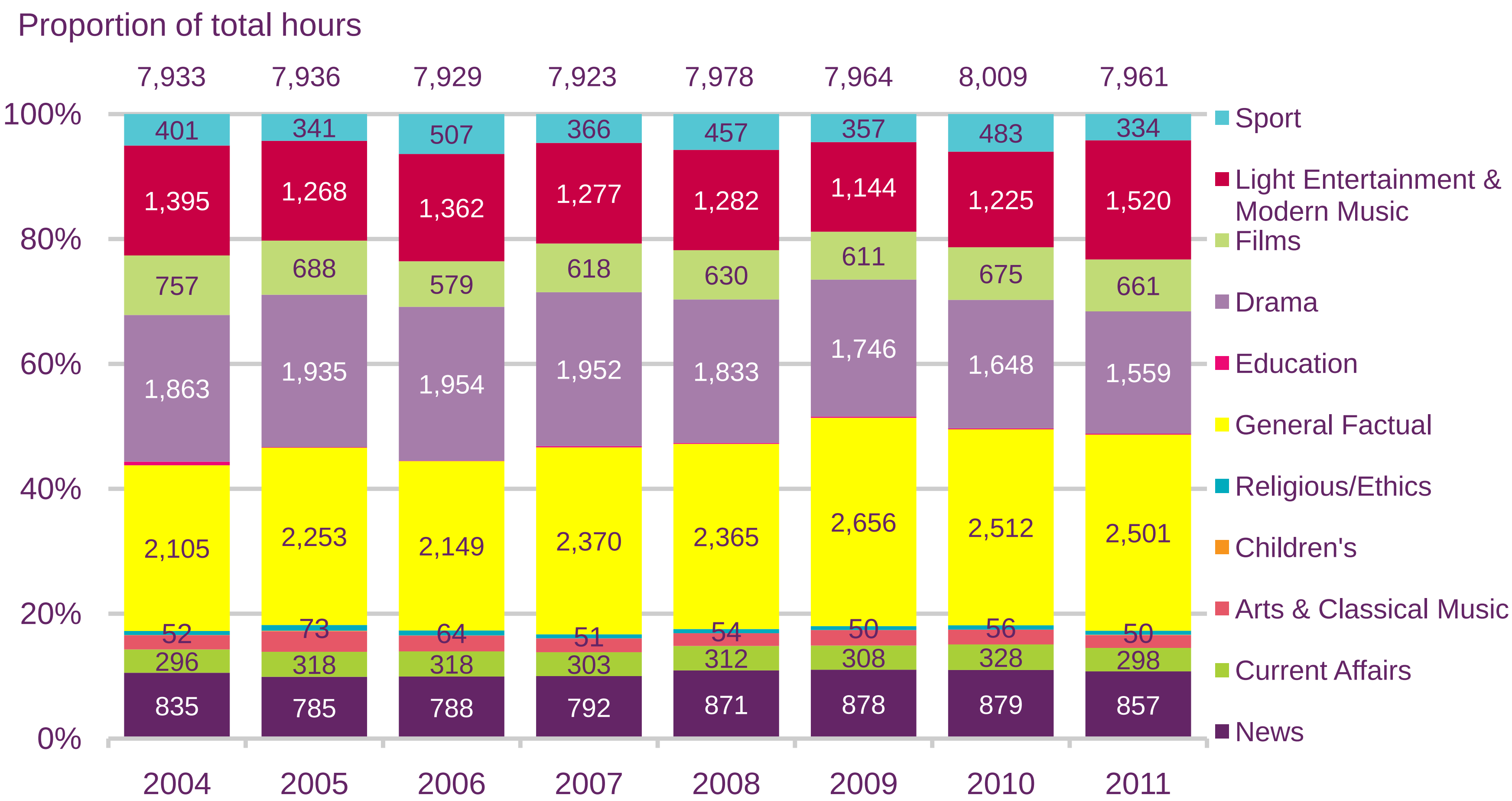
First-run originated output by the PSBs per week, all day and peak time



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

Figure 2.34

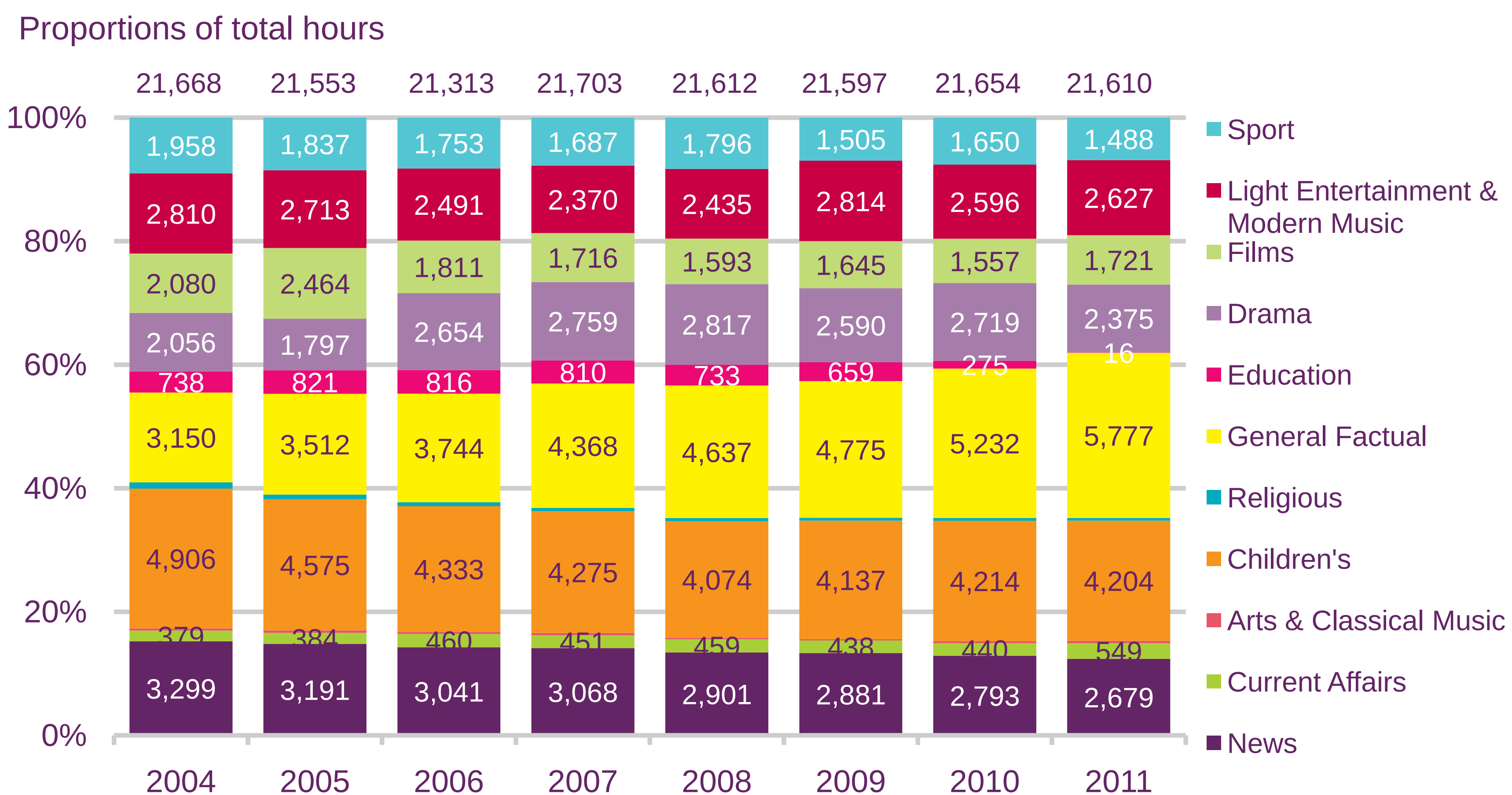
Genre mix on five main PSB channels in peak time, by hours



Source: Ofcom/broadcasters. Note: Includes five main channels including ITV Breakfast, figures do not include hours of nations and regions output.

Figure 2.35

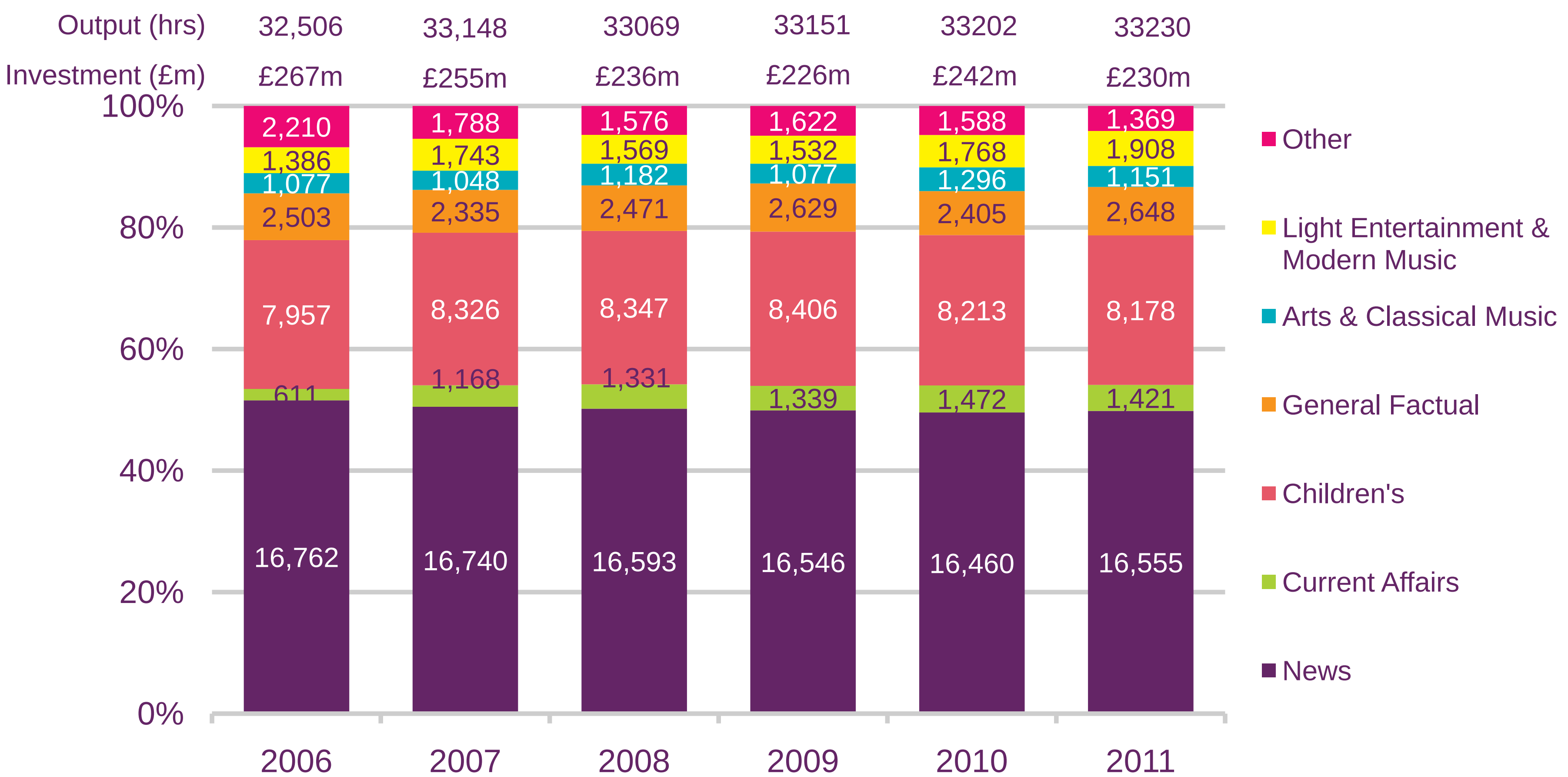
Genre mix on five main PSB channels in daytime



Source: Ofcom/broadcasters. Note: Includes five main channels plus ITV Breakfast. Figures do not include hours of nations and regions output.

Figure 2.36

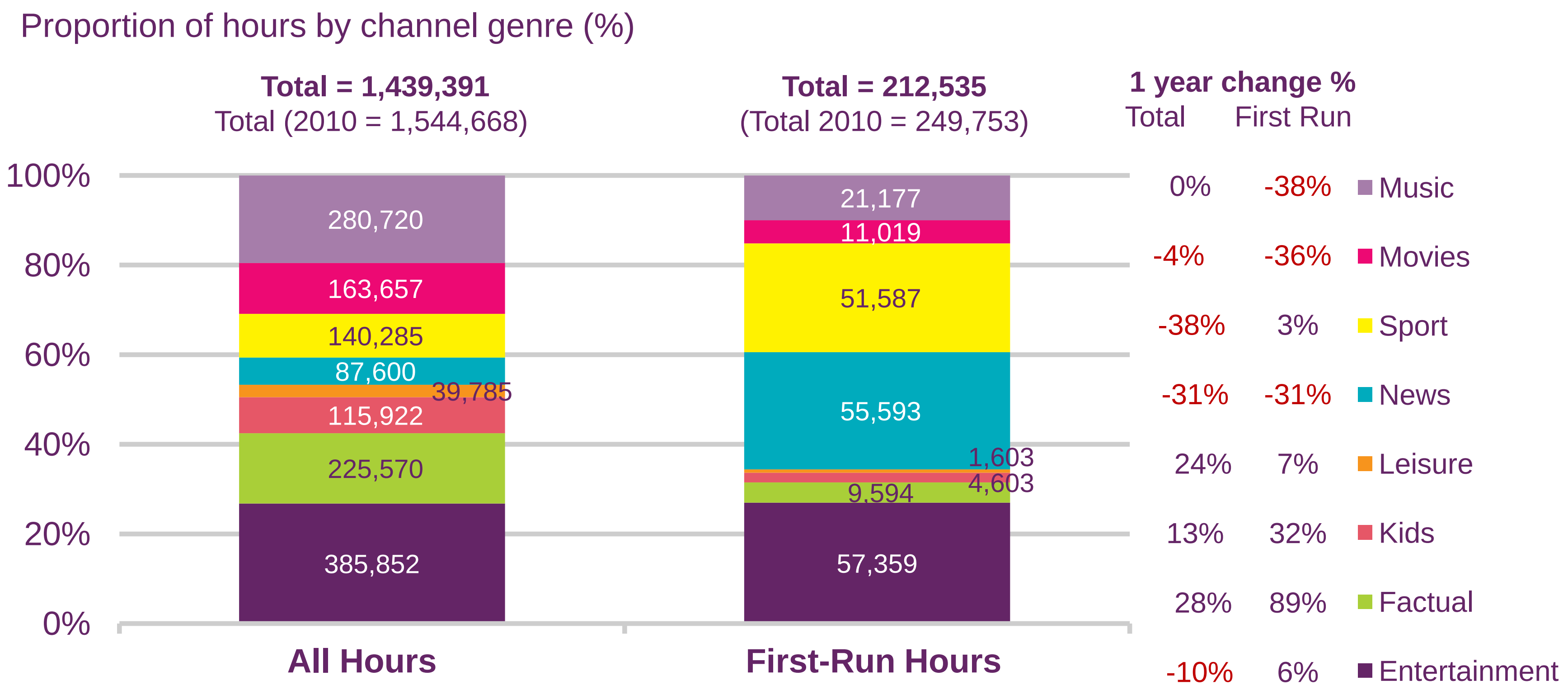
The BBC’s digital channels genre mix by hours: all day



Source: Ofcom/broadcasters. Note: BBC digital channels include BBC Three, BBC Four, BBC News 24, BBC Parliament, CBBC, CBeebies. Investment figures are in 2011 prices. ‘Other’ includes: Education, Drama, Film, Religion and Sports.

Figure 2.37

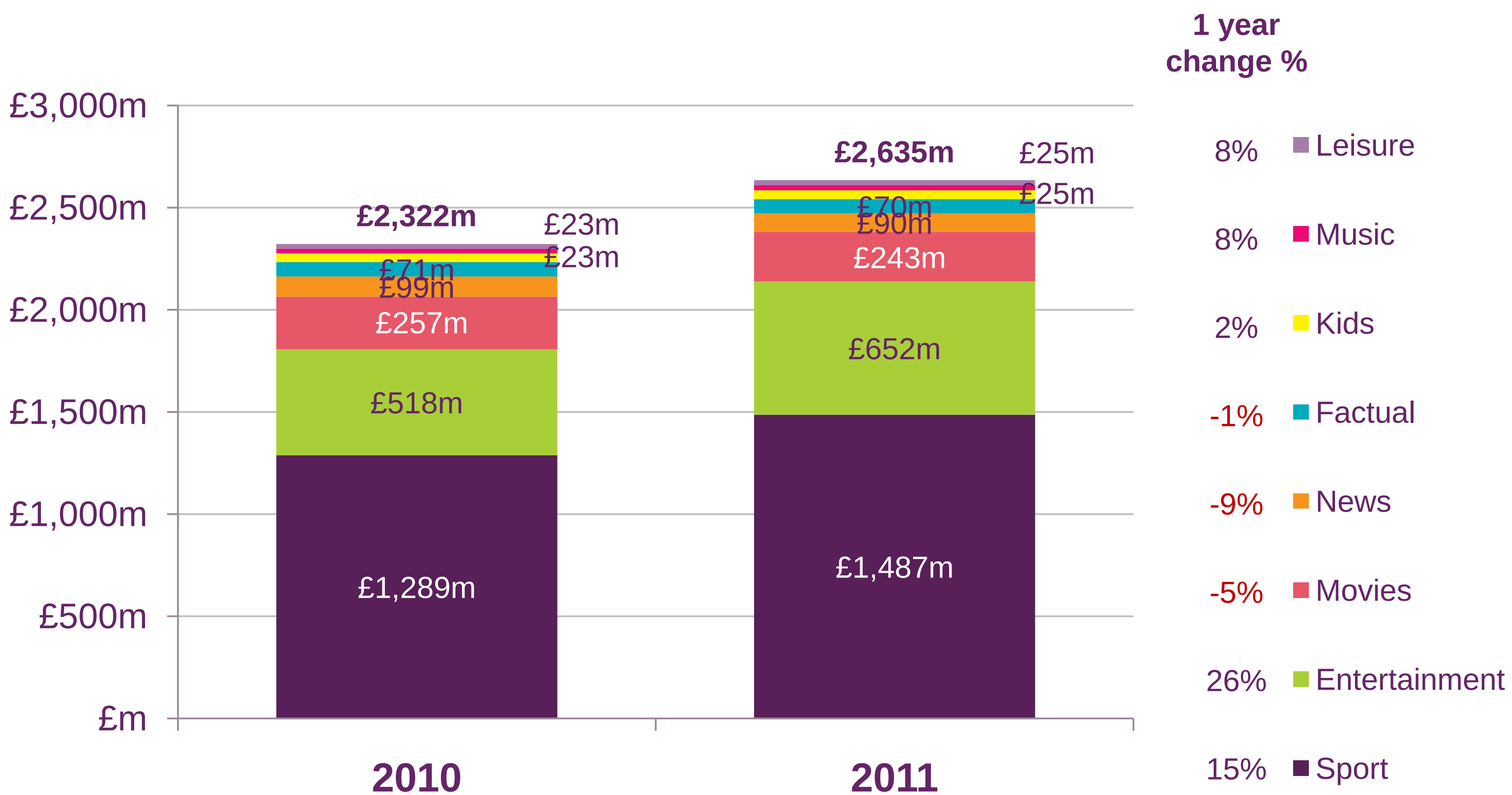
Total multichannel hours and first-run originations/acquisitions, 2011



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.

Figure 2.38

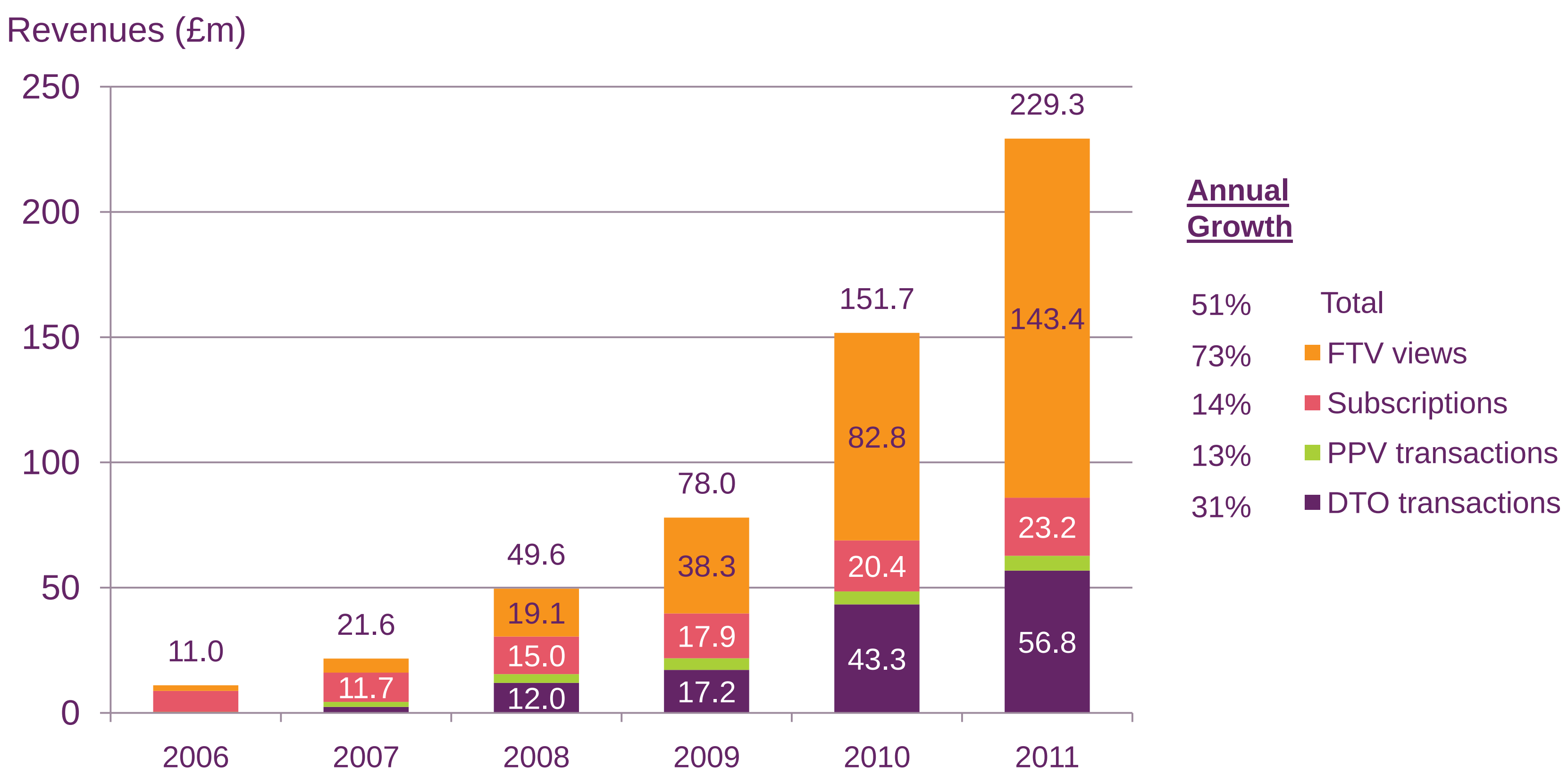
Content spend by commercial multichannels in key genres: 2010 - 2011



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

Figure 2.39

Online TV revenues

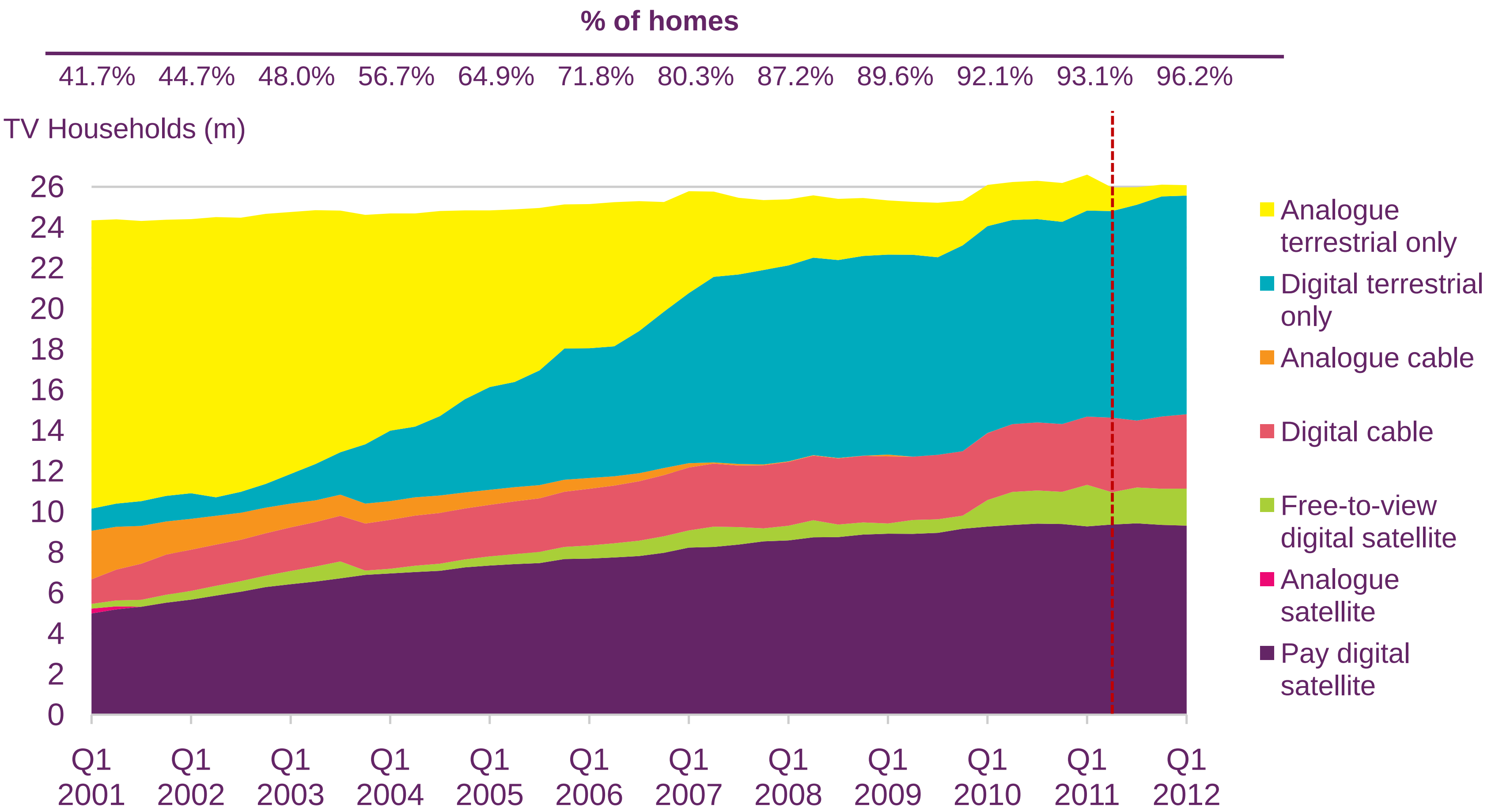


Source: Screen Digest. Note: FTV = free to view; PPV = pay per view; DTO = download to own.

1. TV AND AV VIEWER

Figure 2.40

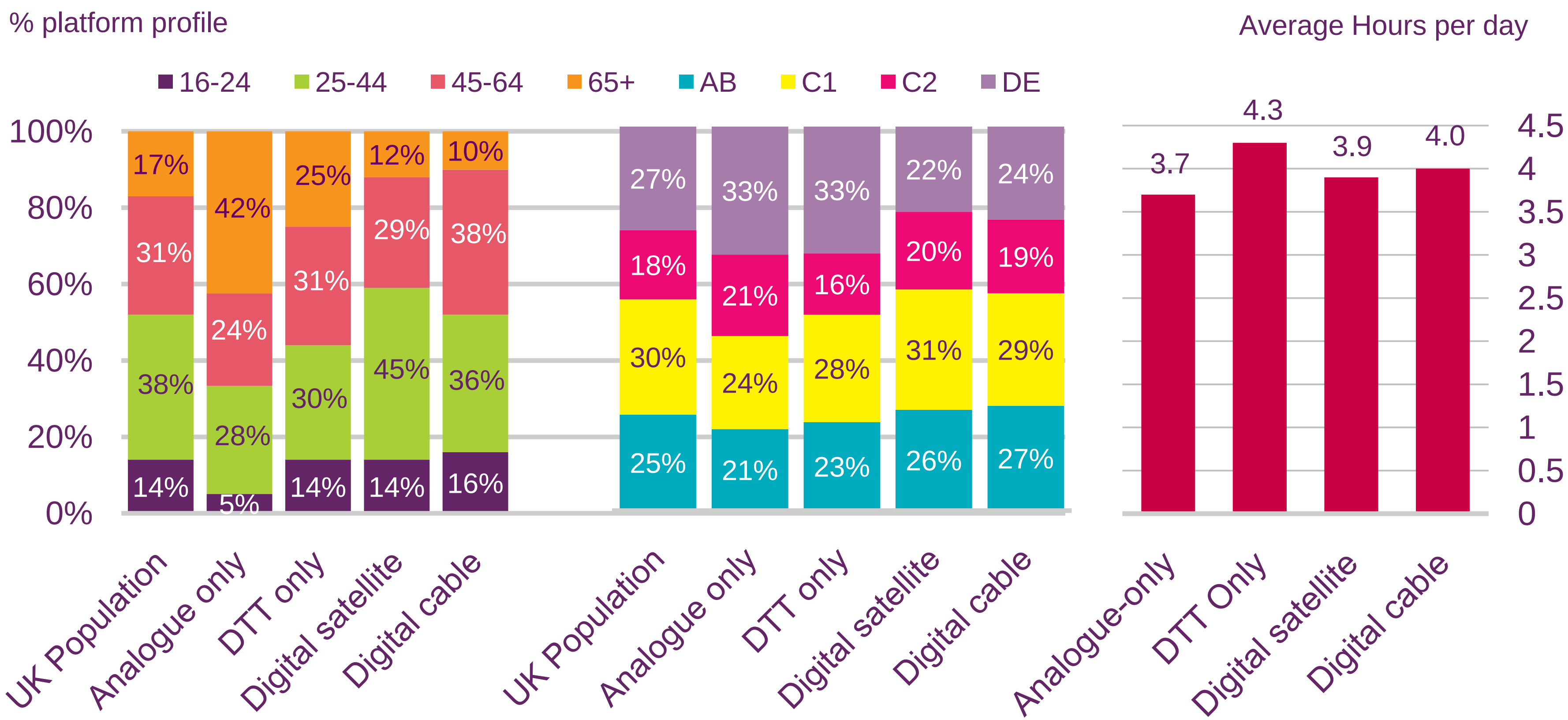
Multichannel take-up in UK households



Source: BARB Establishment Survey from Q2 2011, GfK NOP research from Q1 2007, previous quarters include subscriber data and Ofcom market estimates for DTT and free satellite. Note: Digital terrestrial relates to DTT-only homes.

Figure 2.41

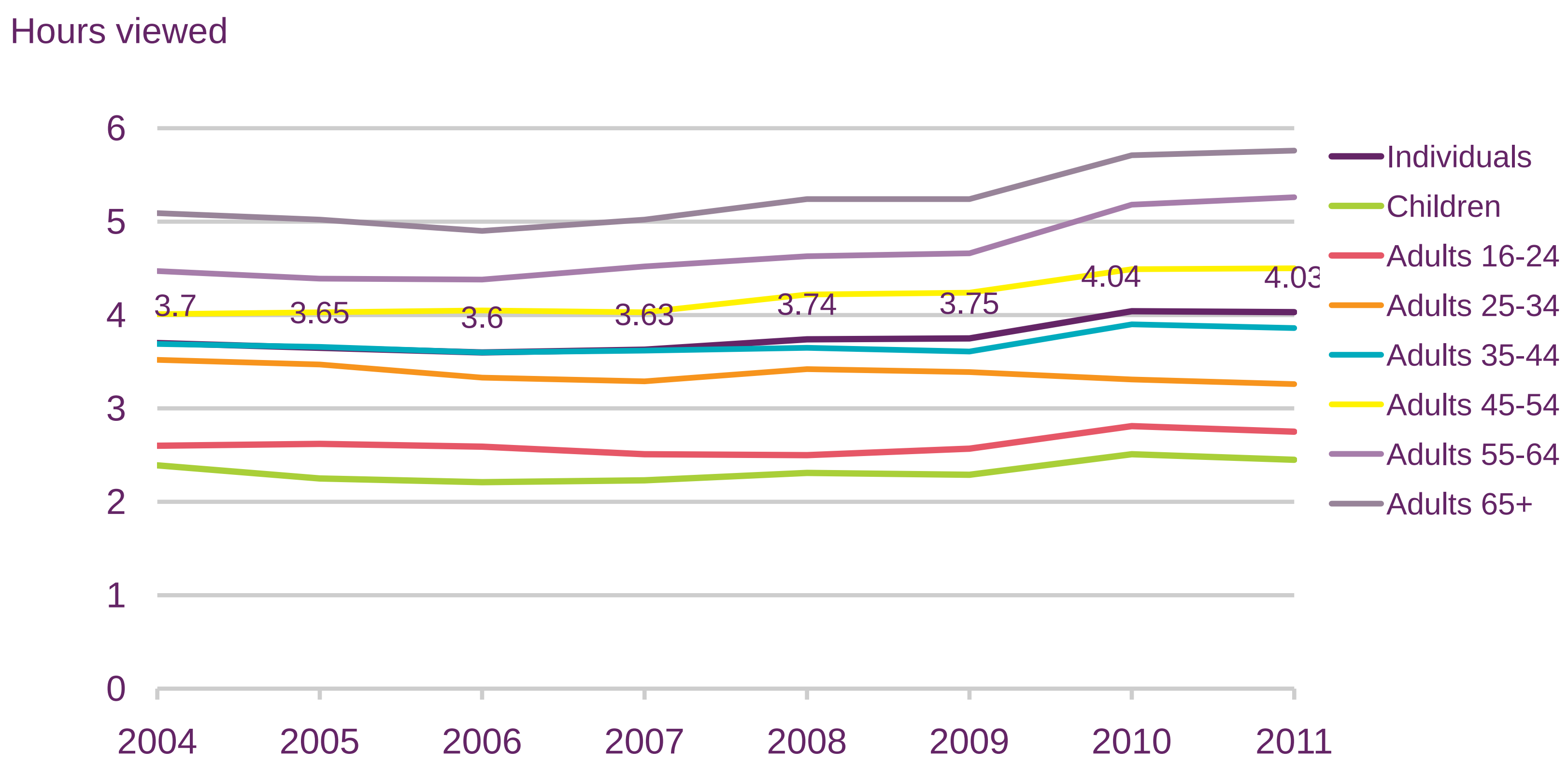
Platform demographics by age, socio-economic group and viewing hours



Source: Ofcom 2012 data and BARB 2011data

Figure 2.42

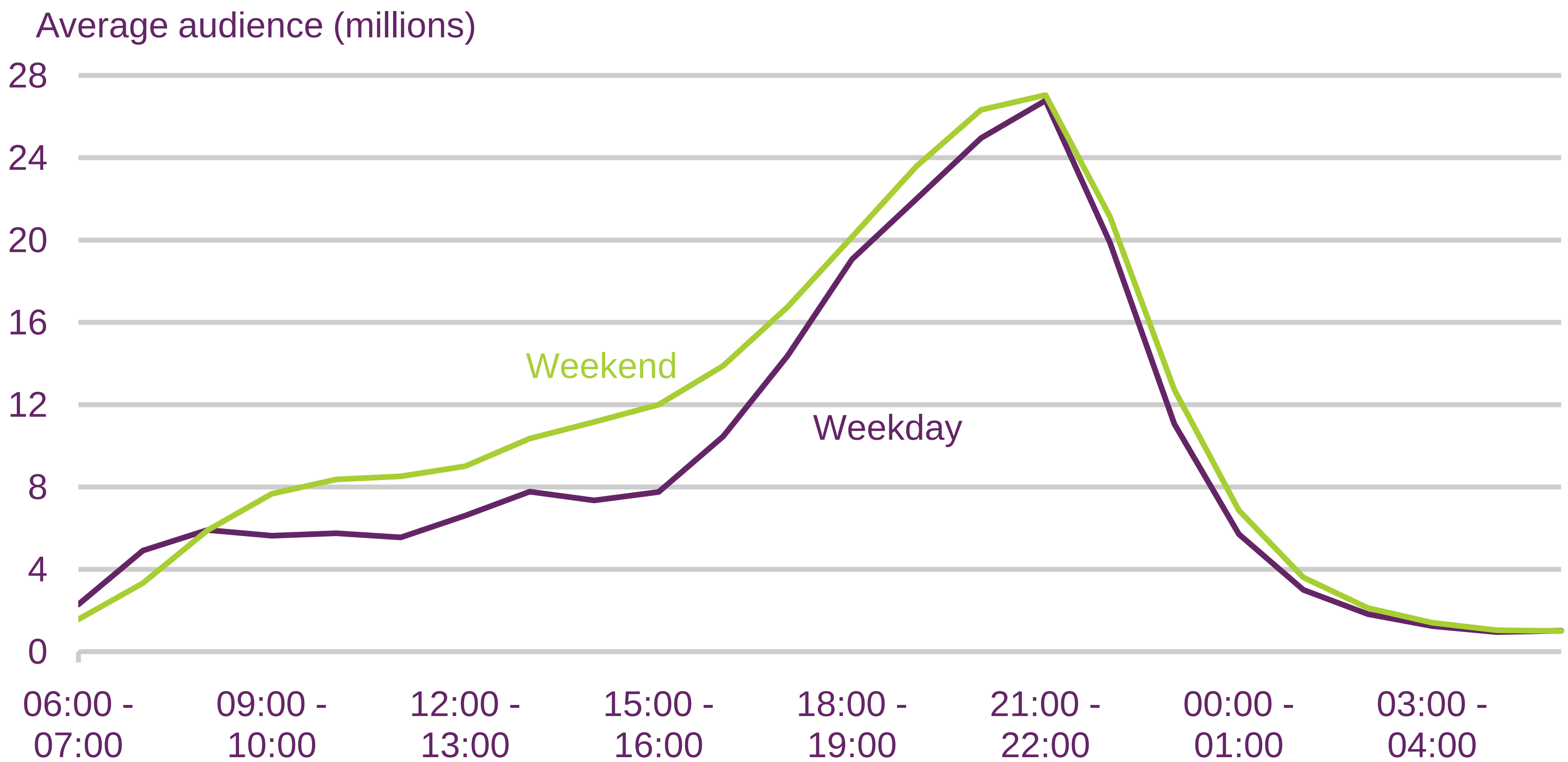
Average hours of television viewing per day, by age, all homes



Source: BARB. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.43

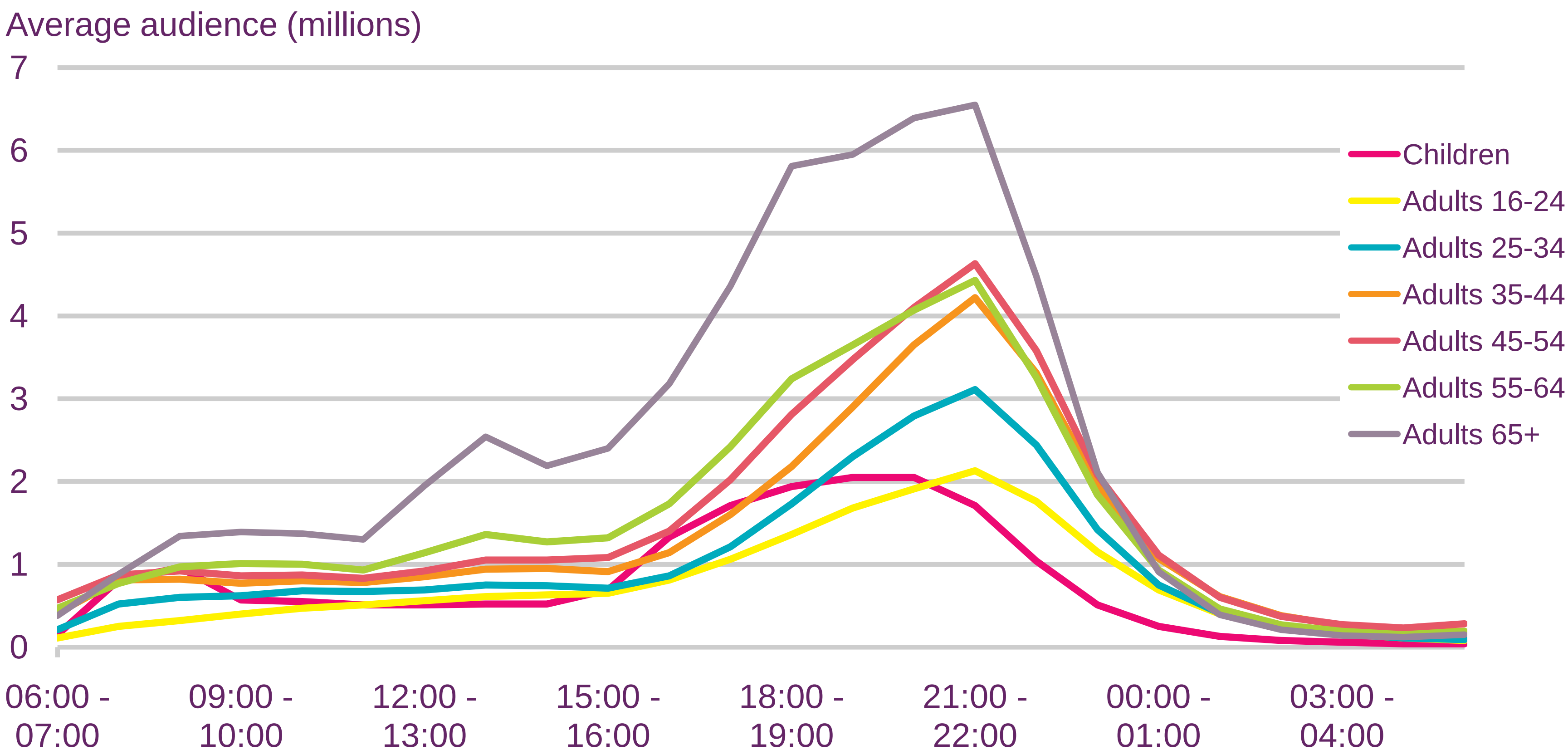
Average 2011 audiences, weekdays/weekends: by day part, all homes



Source: BARB

Figure 2.44

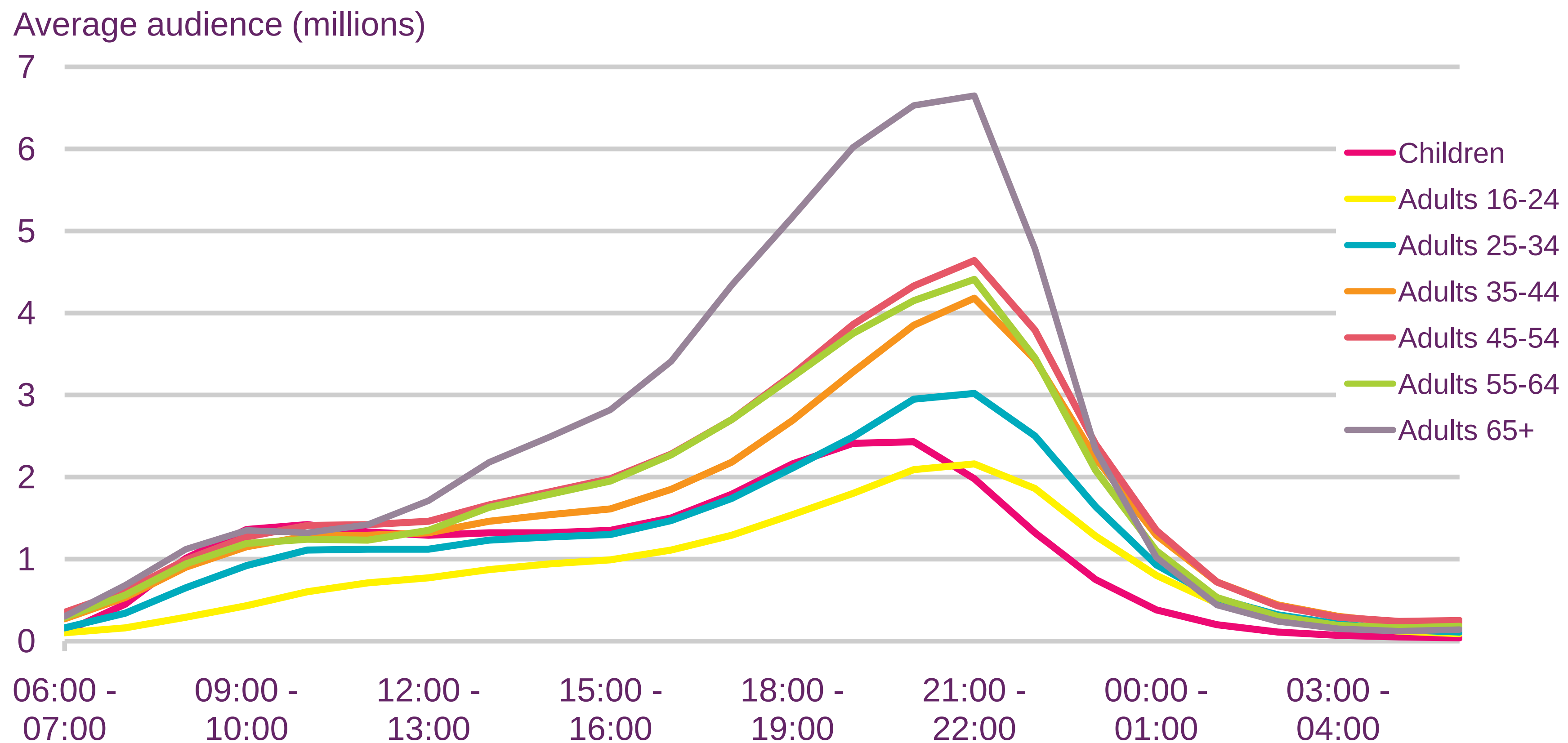
Average 2011 weekday audiences, by day part and age, all homes



Source: BARB

Figure 2.45

Average 2011 weekend audiences, by day part and age, all homes

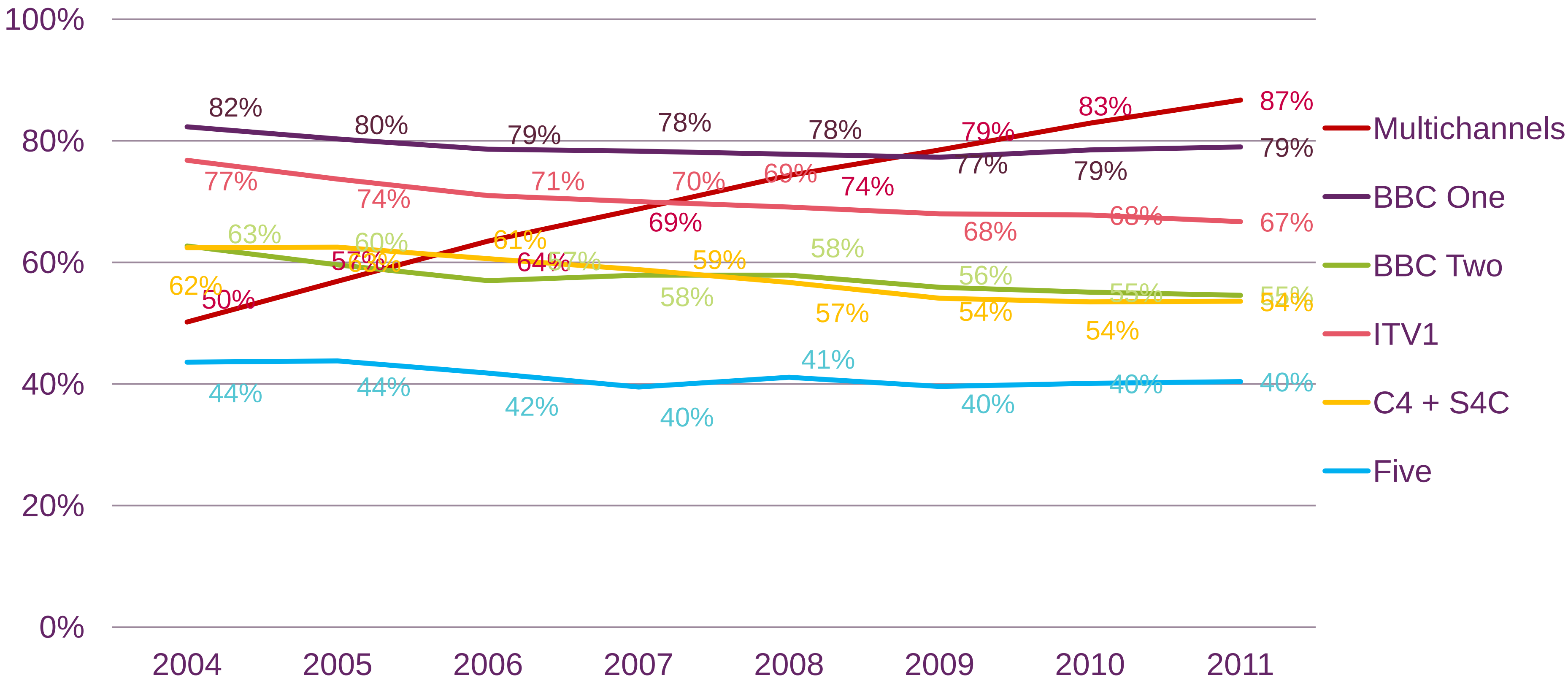


Source: BARB

Figure 2.46

Average weekly TV reach in all homes, by channel

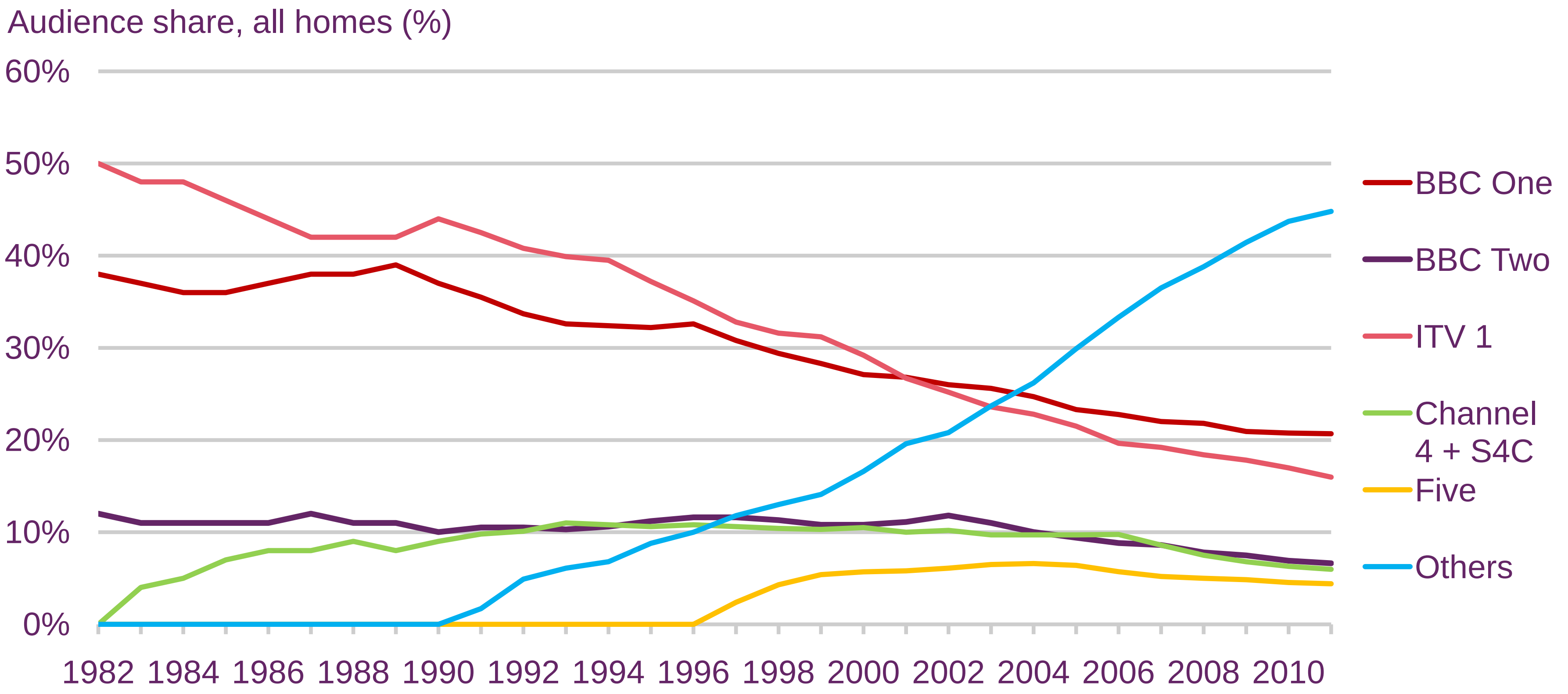
15-minute consecutive weekly reach – full weeks (%)



Source: BARB Note: due to a new BARB measurement panel from 2010 onwards, 2010 and post data should be viewed with caution when comparing with previous years. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts. S4C weekly reach's in 2011 was 0.6%. HD and SD viewing included.

Figure 2.47

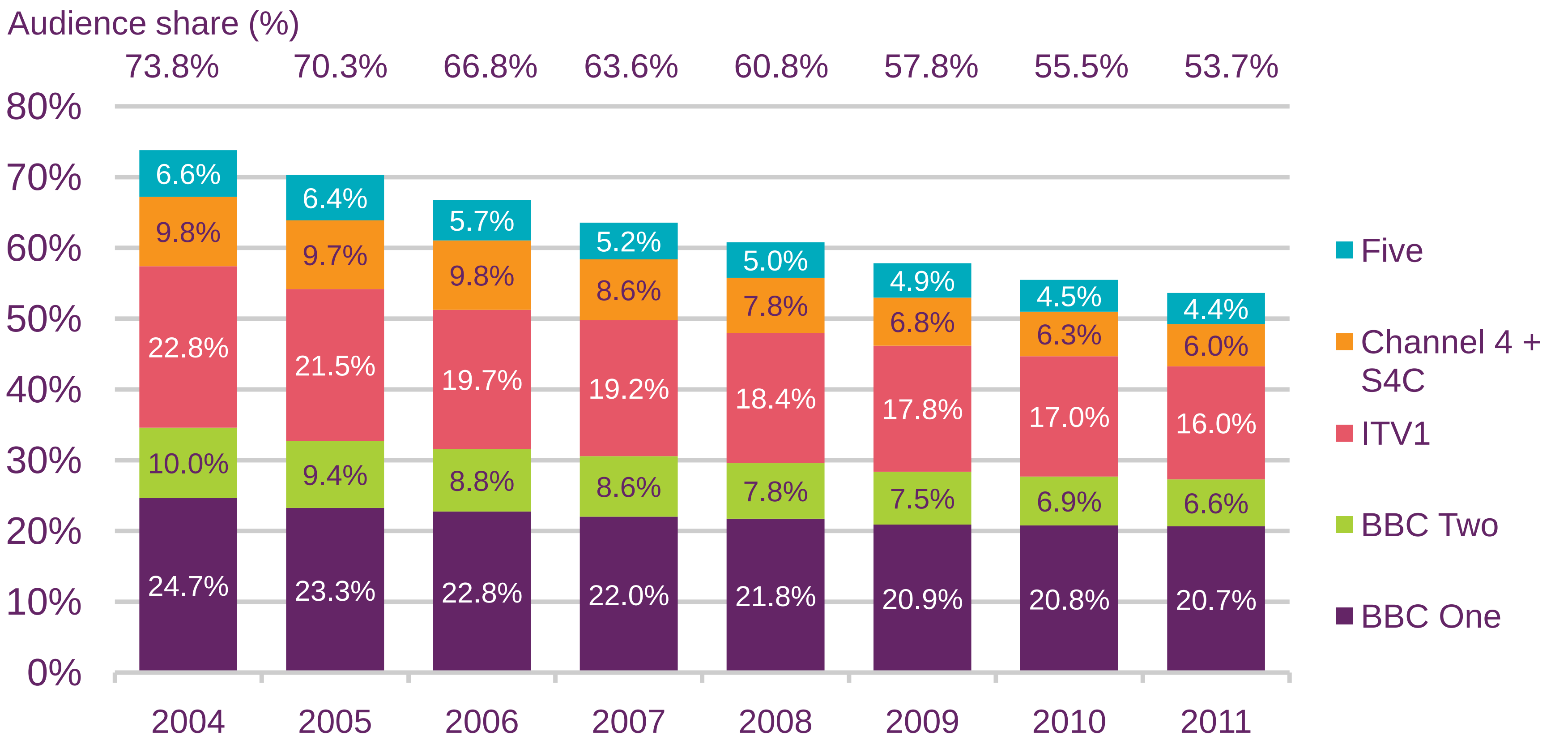
Channel shares in all homes: 1982 to 2011



Source: BARB, TAM JICTAR and Ofcom estimates. Note: due to a new BARB measurement panel from 2010, 2010 and post data should be viewed with caution when comparing with previous years. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts. S4C 2011 channel share = 0.1%. HD and SD viewing included.

Figure 2.48

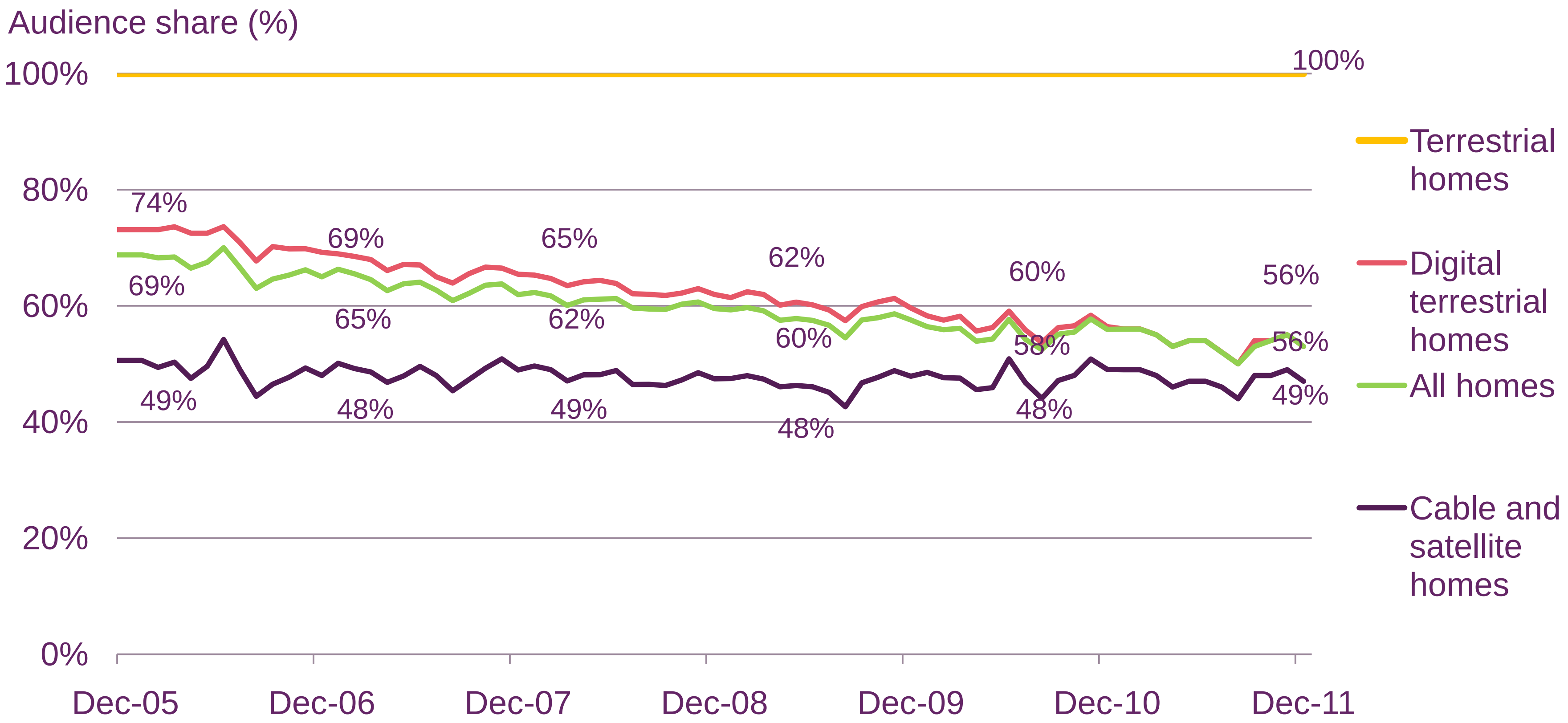
Five main PSB channels' audience share, all homes



Source: BARB. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts.S4C 2011 channel share = 0.1%. HD and SD viewing included

Figure 2.49

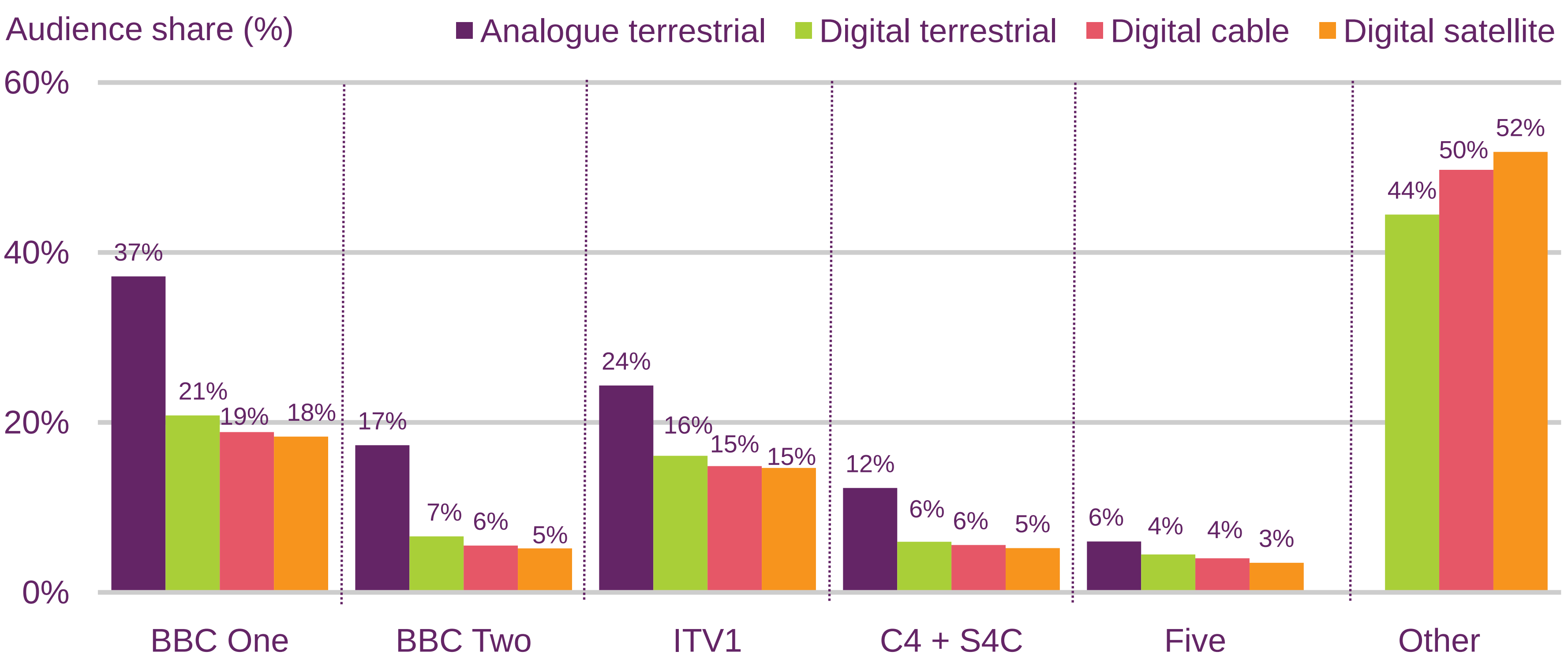
Five main PSB channels' audience shares, by platform



Source: BARB, all homes, all viewers, various platforms. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain grouped together in relevant charts.S4C 2011 channel share (all homes)= 0.1%. HD and SD viewing included.

Figure 2.50

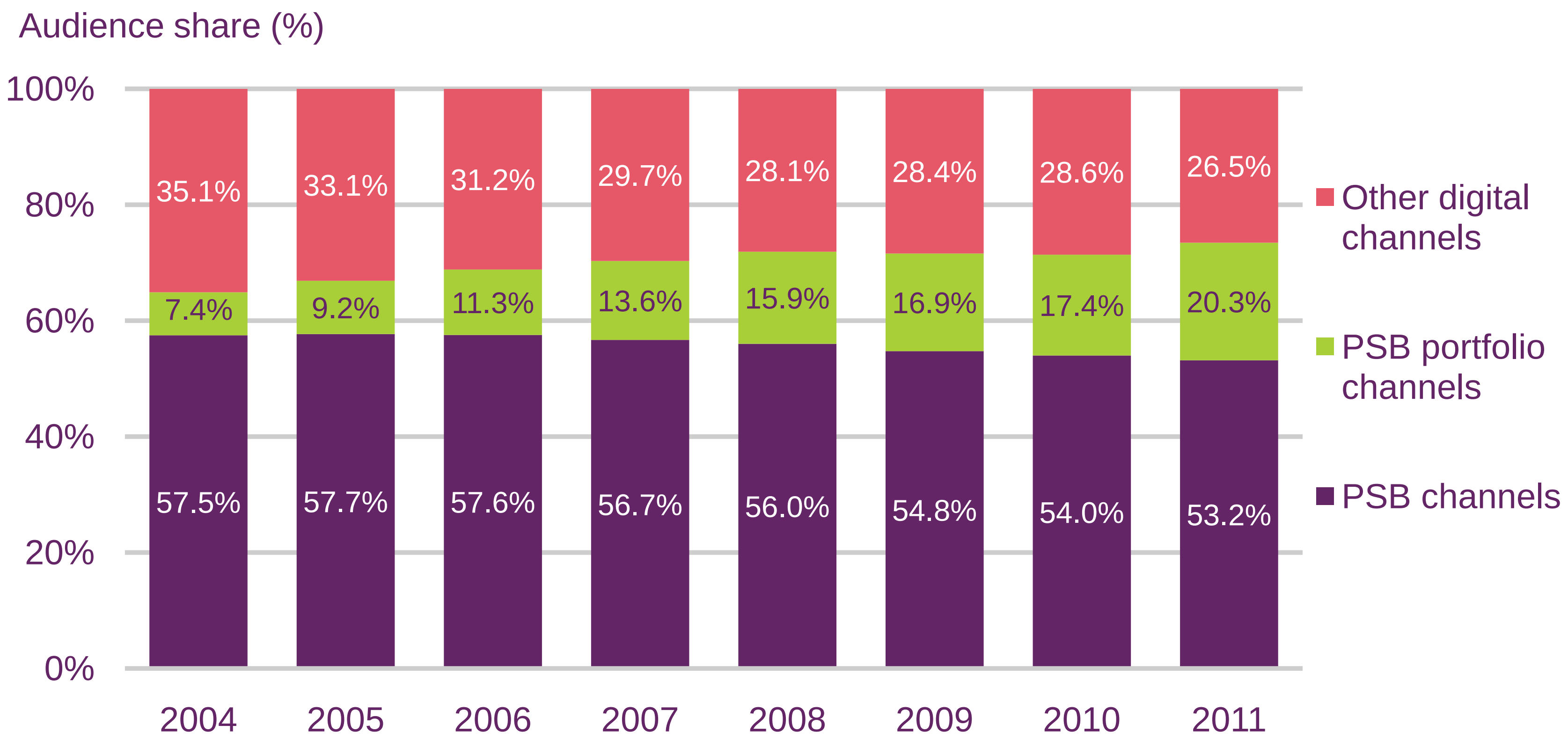
Channel share, by platform: 2011



Source: BARB. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts.S4C 2011 channel share (all homes) = 0.1%. HD and SD viewing included

Figure 2.51

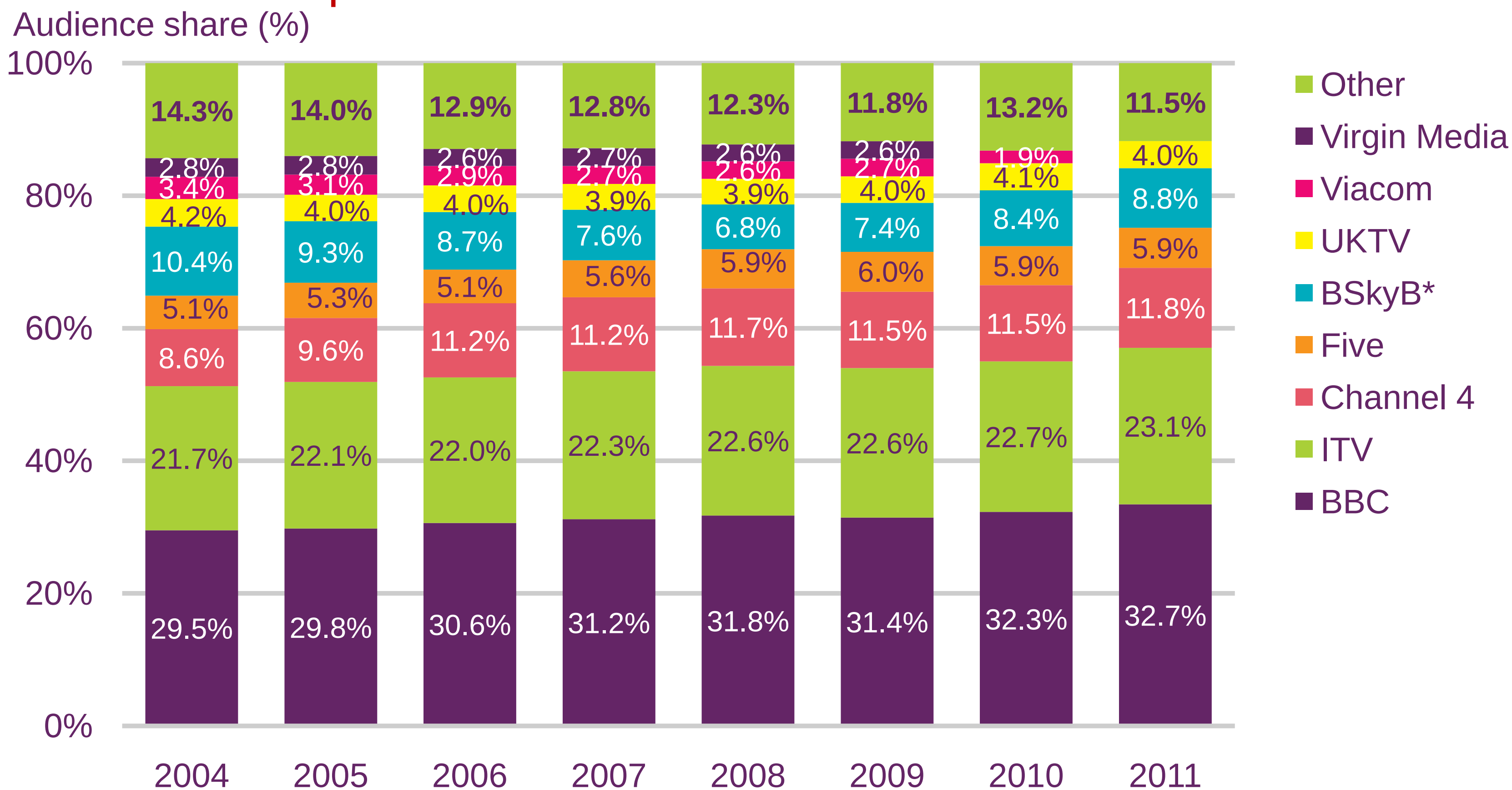
PSB and portfolio channel shares in multichannel homes



Source: BARB. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain grouped together in relevant charts.S4C 2011 channel share = 0.1%. HD and SD viewing included.

Figure 2.52

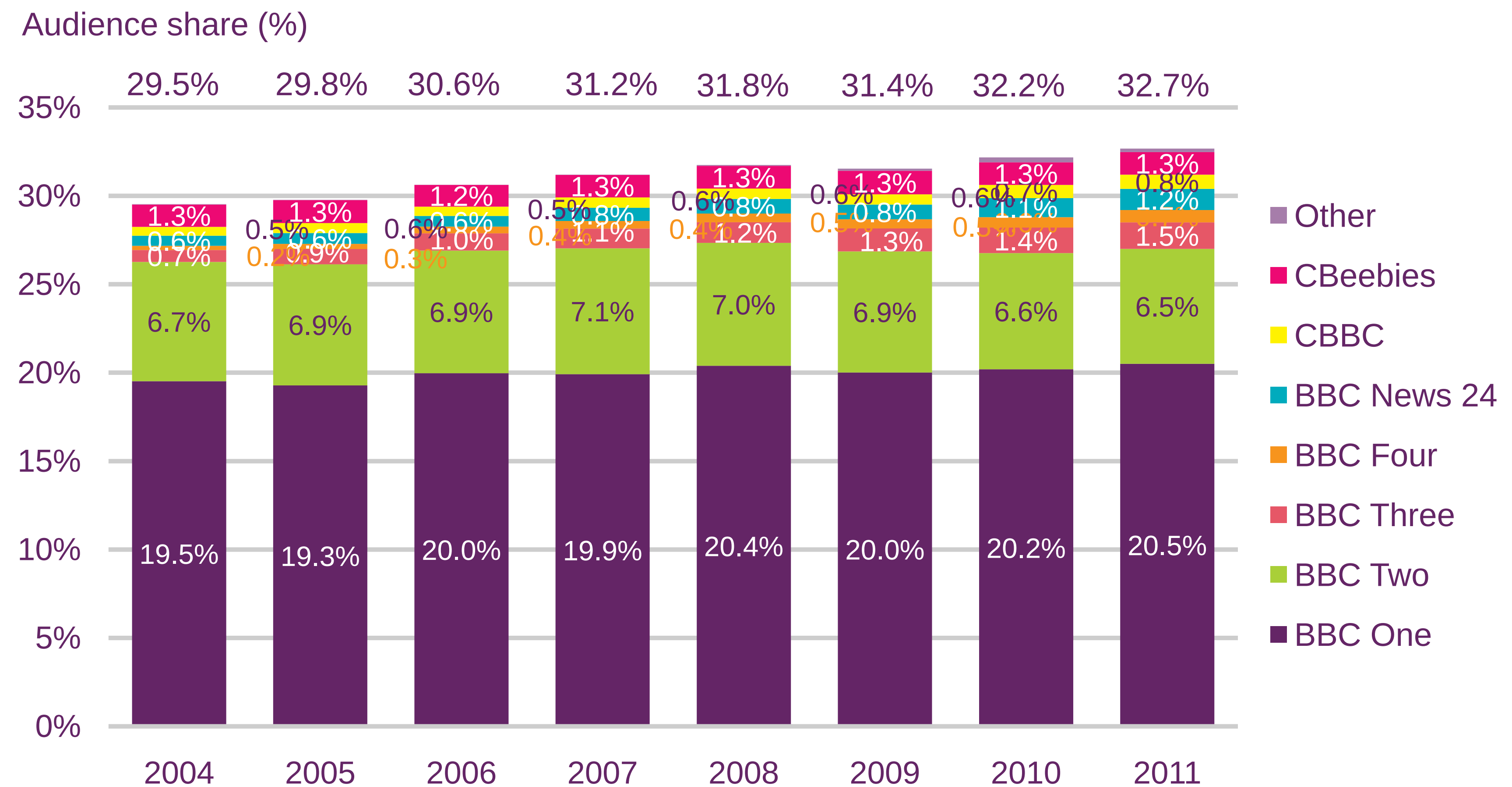
Broadcaster portfolio shares in multichannel homes



Source: BARB. Note: due to a new BARB measurement panel from 2010 onwards, post-2010 data should be viewed with caution when comparing with previous years.*BSkyB took ownership of VMTV in June 2010, Virgin Media TV portfolio shares are included in the BSkyB figure for the whole of 2010. ITV includes all ITV network channels, not just those owned by ITV plc. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain grouped together in relevant charts.S4C 2011 channel share = 0.1%. HD and SD viewing included.

Figure 2.53

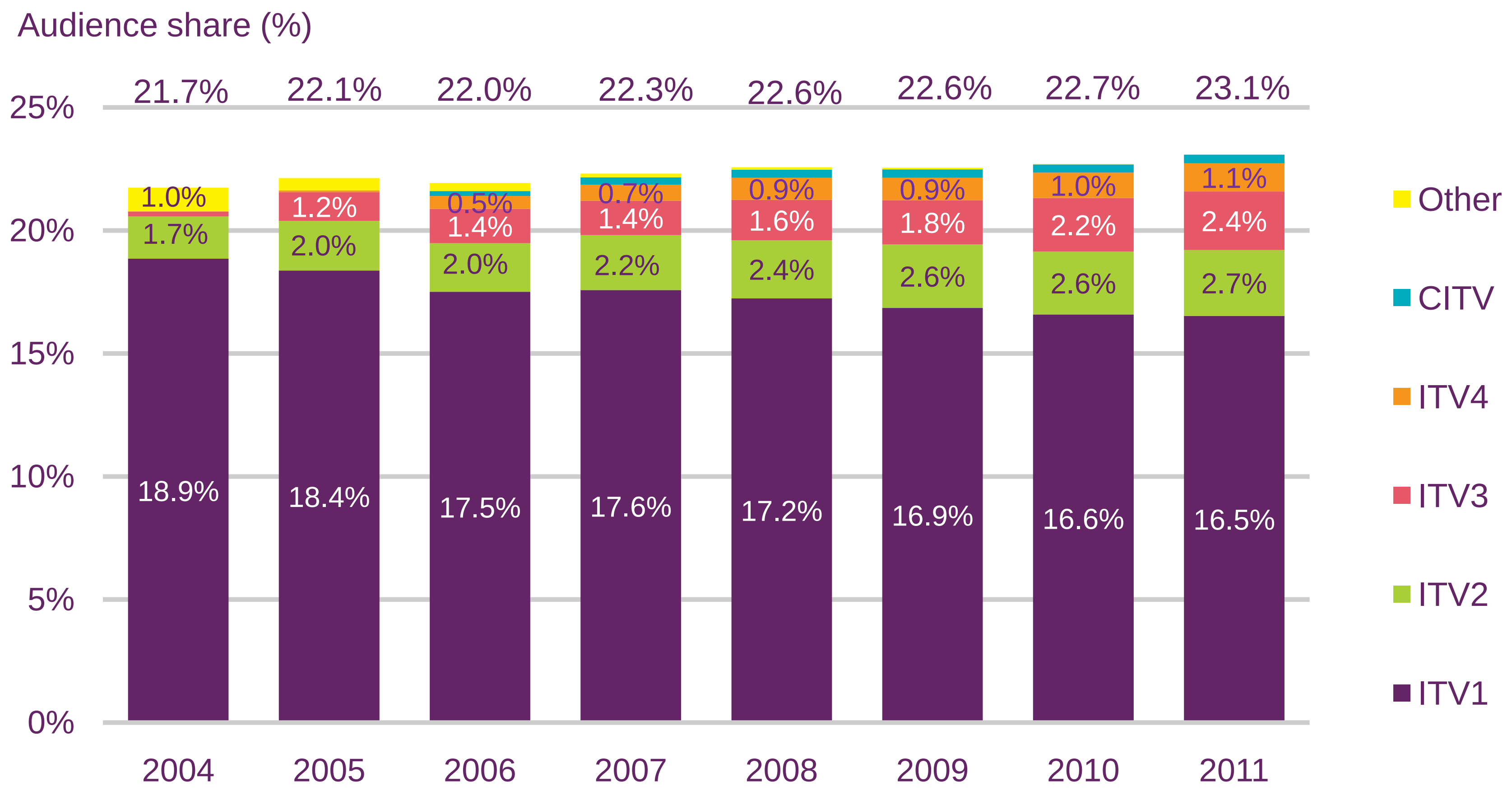
BBC portfolio share in multichannel homes



Source: BARB Note: ‘Other’ includes BBC Parliament, BBC Choice, BBC HD and BBC Knowledge. Due to a new BARB measurement panel from 2010 onwards, post-2010 data are not directly comparable with previous years. HD and SD viewing included

Figure 2.54

ITV portfolio shares in multichannel homes

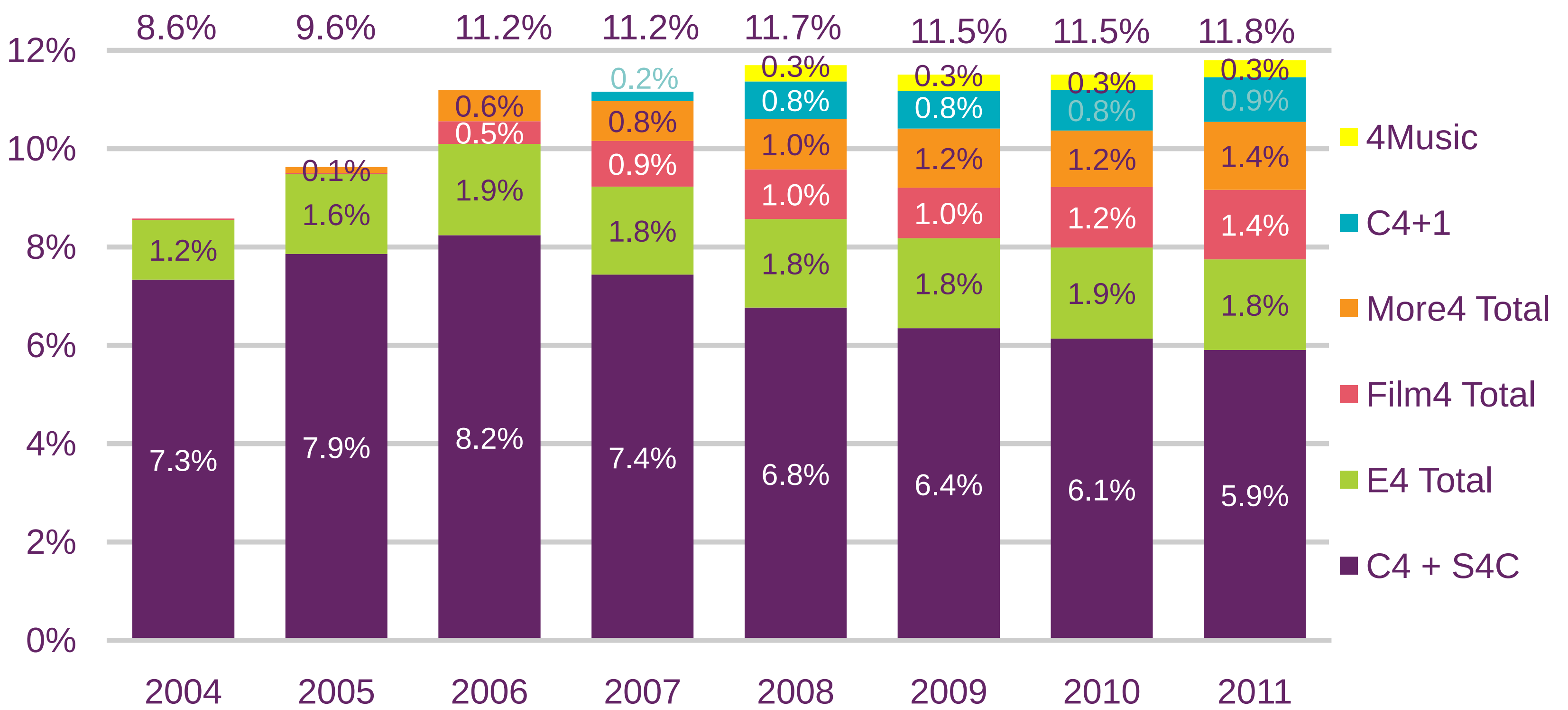


Source: BARB. Note: 'Other' includes (when relevant) ITV Play, Men & Motors, GMTV2, Granada Breeze, Plus, ITV News. ITV1, ITV2, ITV3 and ITV4 and include +1 services' shares. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution

Figure 2.55

Channel 4 portfolio shares in multichannel homes

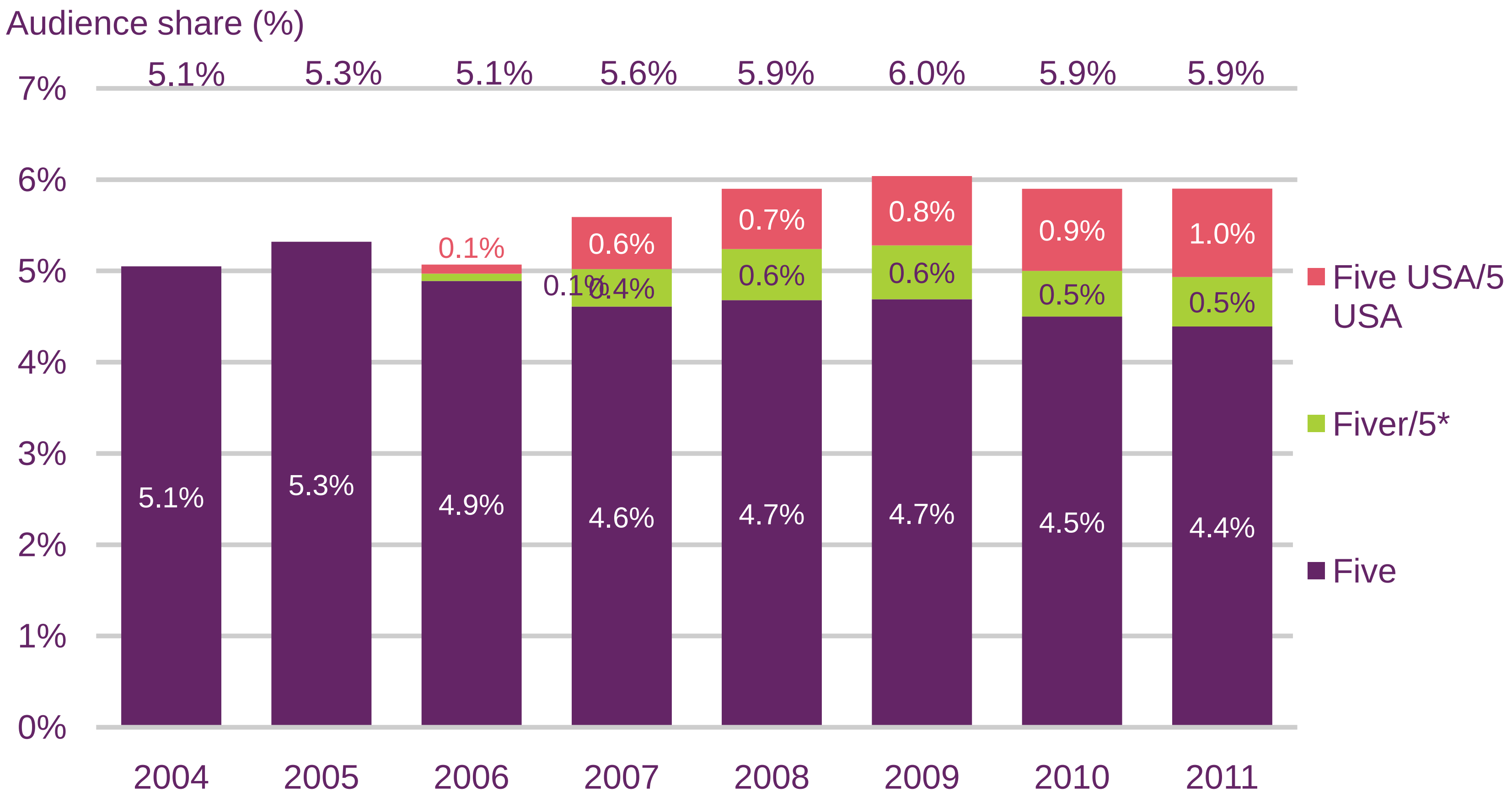
Audience share (%)



Source: BARB. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.E4, More4 and Film 4 respective +1 channel shares are included. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts. S4C 2011 channel share = 0.1%. HD and SD viewing included.

Figure 2.56

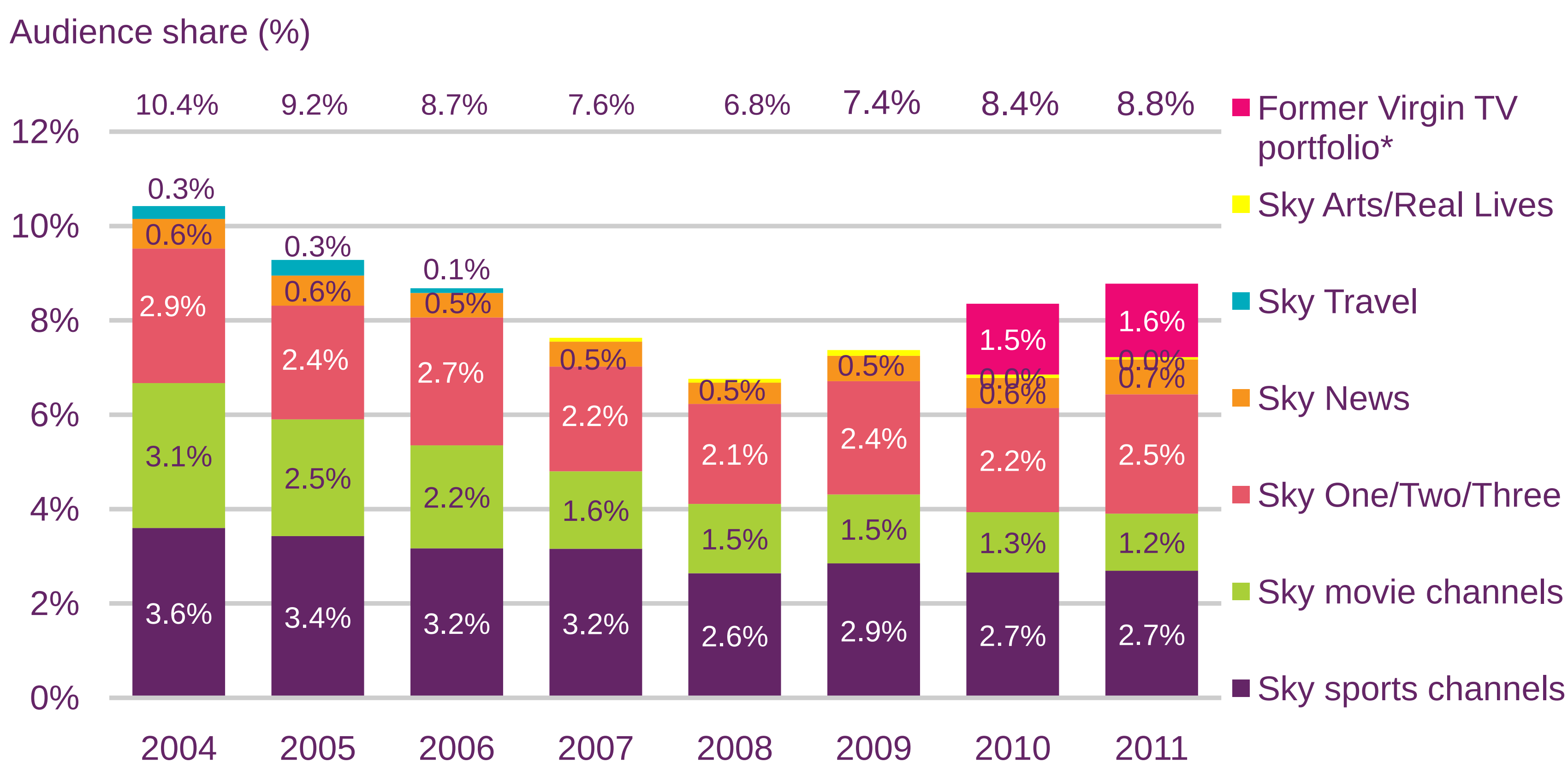
Five portfolio shares in multichannel homes



Source: BARB. Note: 5* and 5 US include their +1 service share. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution HD and SD viewing included.

Figure 2.57

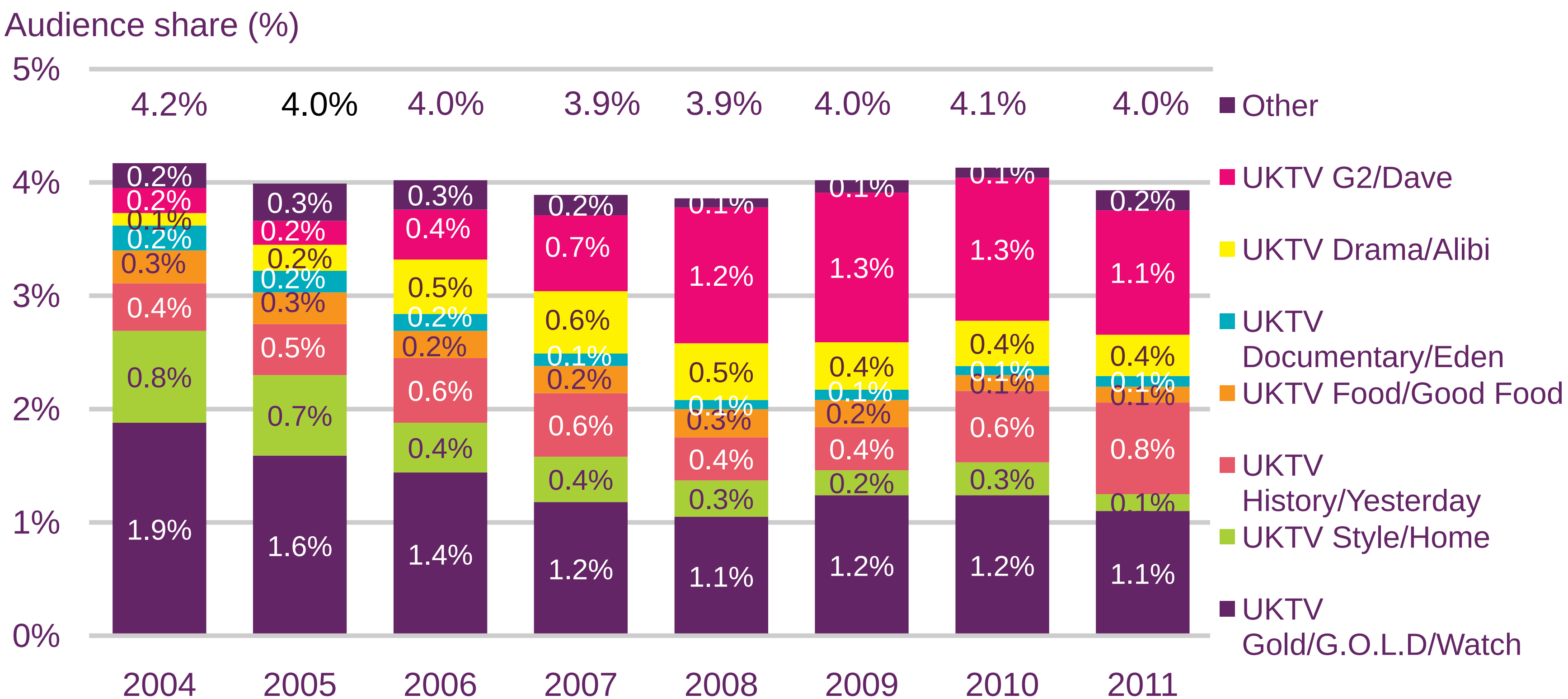
BSkyB portfolio shares in multichannel homes



Source: BARB. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. *BSkyB took ownership of VMTV in June 2010, Virgin Media TV portfolio shares are included in the BSkyB figure for the whole of 2010 onwards. HD and SD viewing included.

Figure 2.58

UKTV portfolio shares in multichannel homes



Source: BARB. Note: UKTV portfolio channels have evolved over the past twelve months. In the 2008 figures, new channel names and shares have been matched to old channels. Dave went live in Oct 2007. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. HD and SD viewing included.

Figure 2.59

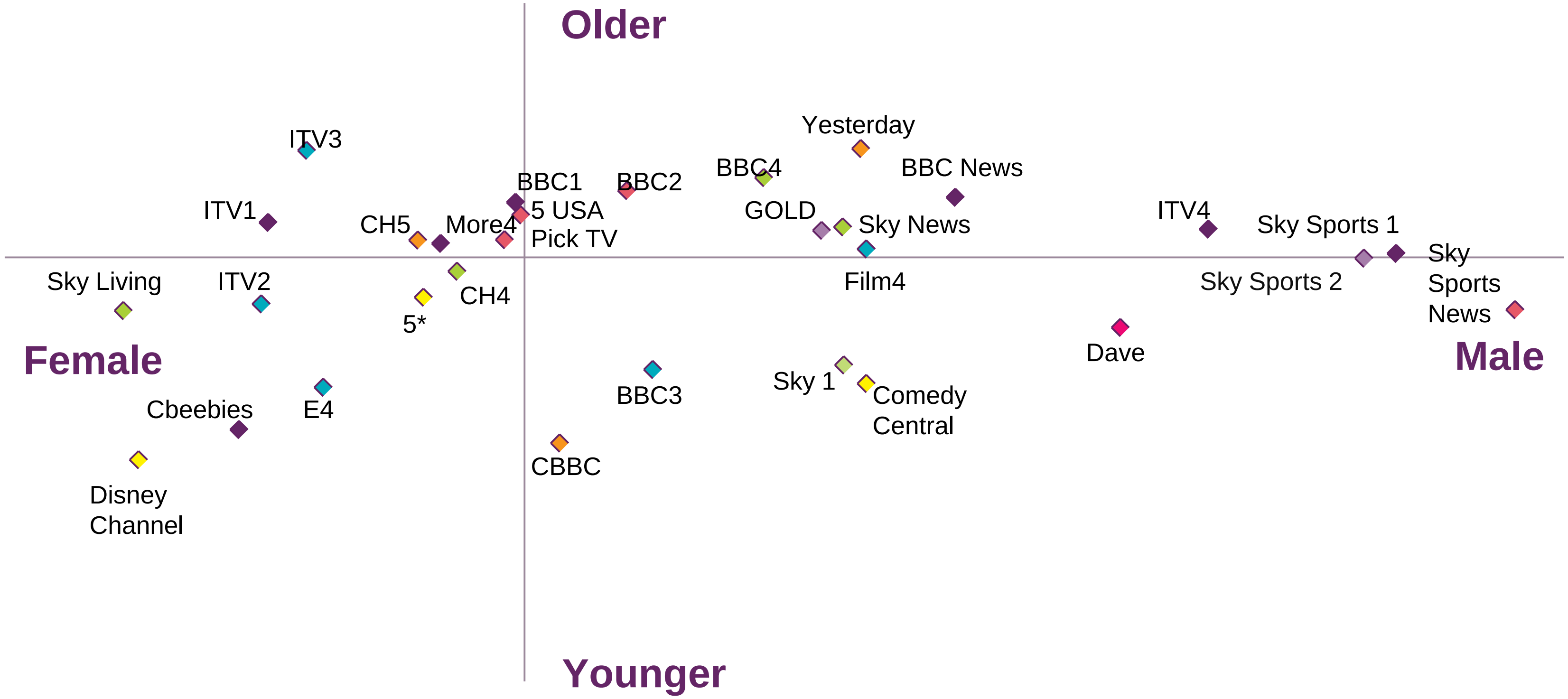
The top channels by share in multichannel homes: 2010 to 2011

	Share	Rank			Share	Rank	
Channel	2011	2011	2010	Channel	2011	2011	2010
BBC One	20.5%	1	1	CBeebies	1.3%	11	10
ITV1	16.5%	2	2	More4	1.2%	12	14
Channel 4	6.7%	3	3	Sky Sports 1	1.2%	13	13
BBC Two	6.5%	4	4	BBC News	1.2%	14	15
Channel 5	4.4%	5	5	ITV4	1.1%	15	16
ITV2	2.7%	6	6	Dave	1.1%	16	12
ITV3	2.4%	7	8	Sky One	1.1%	17	17
E4	1.8%	8	7	Pick TV	1.0%	18	18
BBC Three	1.5%	9	12	5 USA	1.0%	19	20
Film4	1.4%	10	11	Yesterday	0.8%	20	27

Source: BARB. Note: Includes channels' +1 services. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. HD and SD viewing included.

Figure 2.60

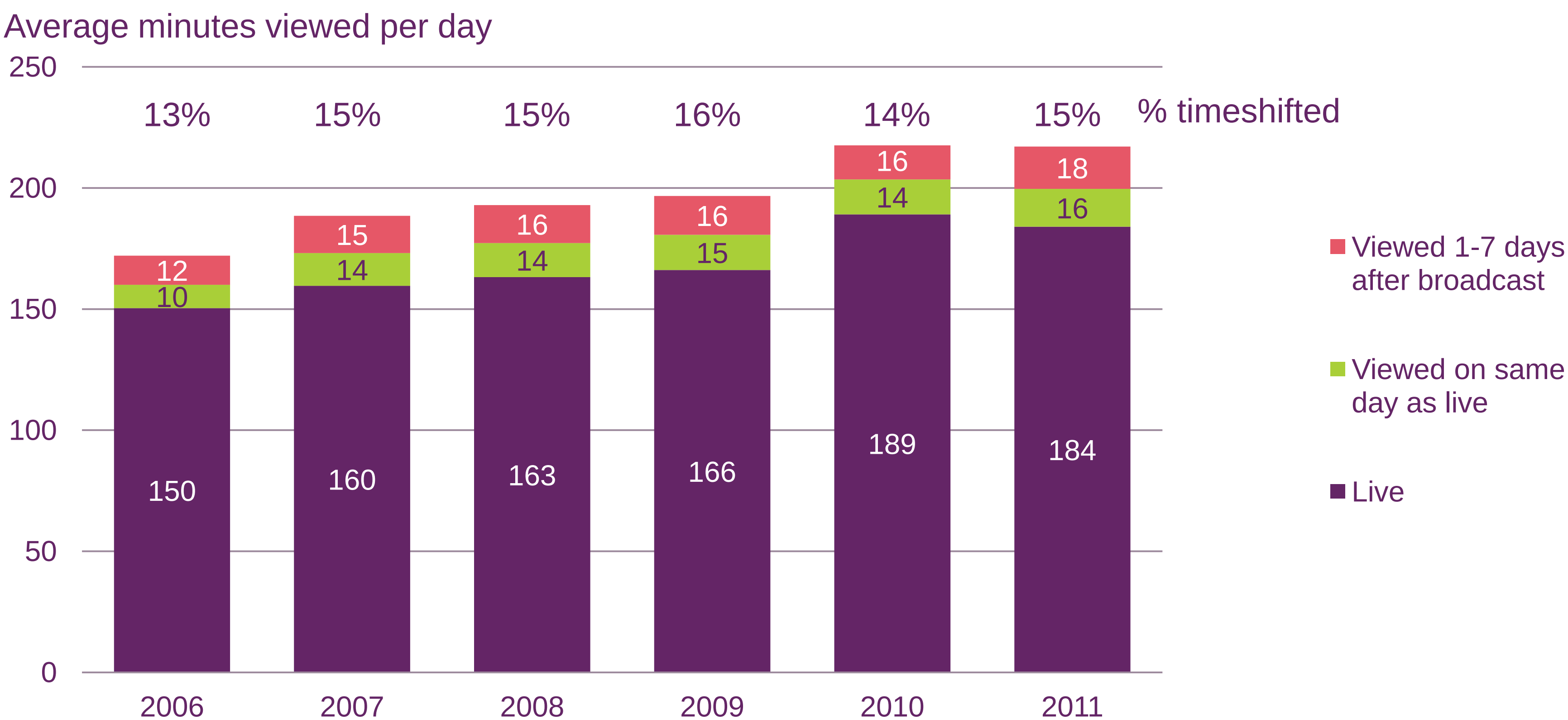
Age and gender profile of the 30 most-viewed channels in multichannel homes



Source: BARB Note: The profile of a channel is calculated relative to the television population in multichannel homes. Includes channel's +1 services. HD and SD viewing included.

Figure 2.61

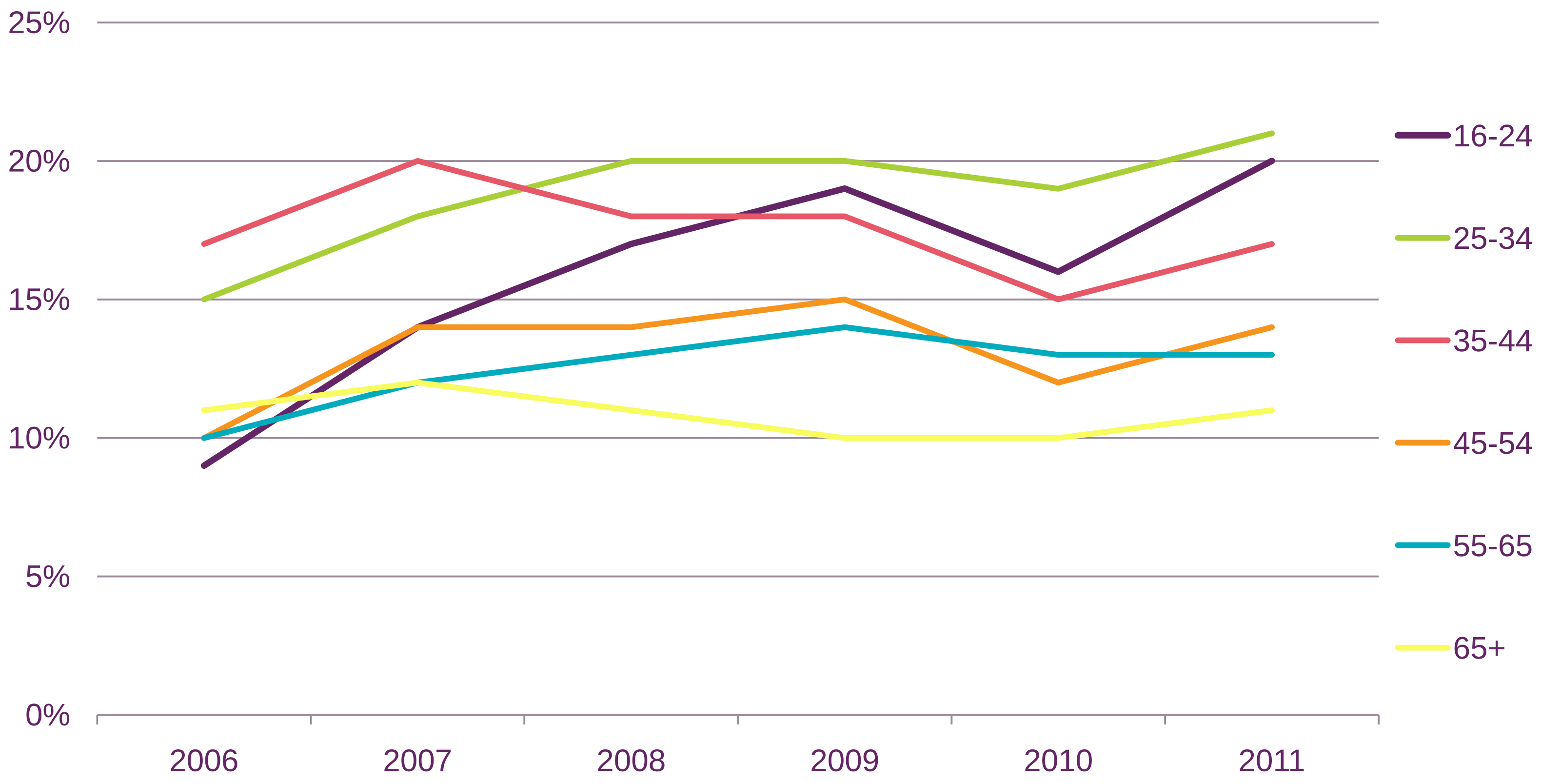
Live versus time-shifted viewing, DVR homes



Source: BARB, DVR owners, all homes. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Time-shifted viewing defined as total minutes of viewing on same day as live (VOSDAL) + Viewing 1-7 days after broadcast (Coded Playback). All viewing (via a TV set) of broadcast content viewed within 7 days after broadcast is reported by BARB. This will include viewing to catch-up TV services and content viewed via player services such as BBC iPlayer, ITV Player, 4OD etc

Figure 2.62

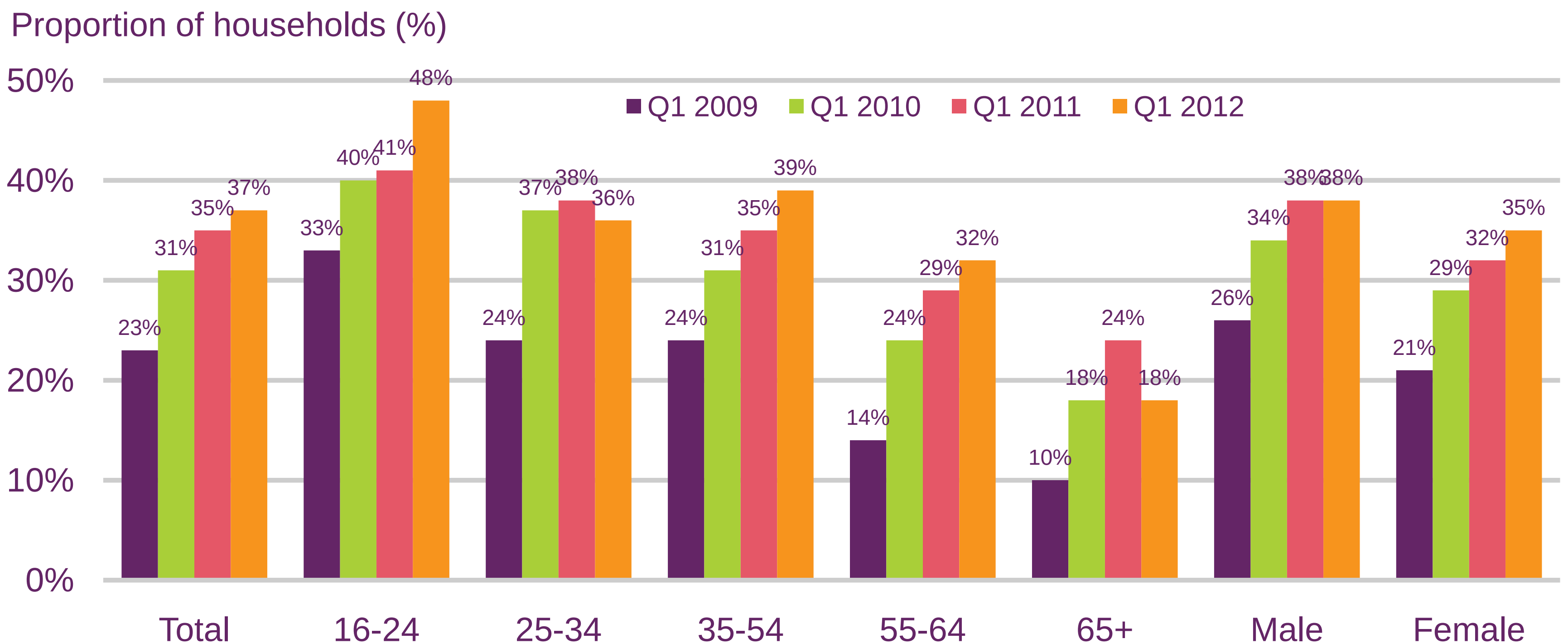
Proportion of time shifted viewing, by age



Source: BARB, DVR owners, all homes. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.63

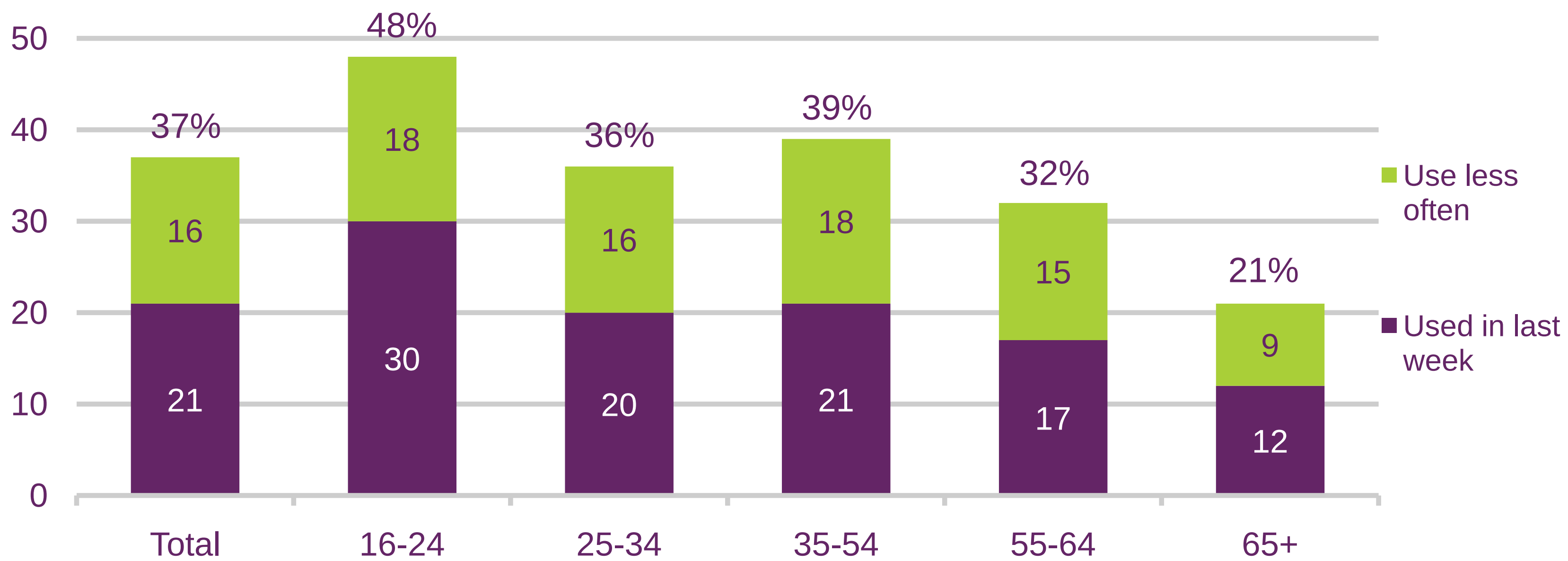
Proportion of adults with home internet who watch online catch-up TV: 2009 to 2012



Source: Ofcom research Q1 2012
QE5A. Which, if any, of these do you or your household use the internet for whilst at home?
Base: All adults who have the internet at home (n=2823 UK, 423 16-24, 524 25-34, 1113 35-54, 431 55-64, 330 65+, 1367 Male, 1456 Female)

Figure 2.64

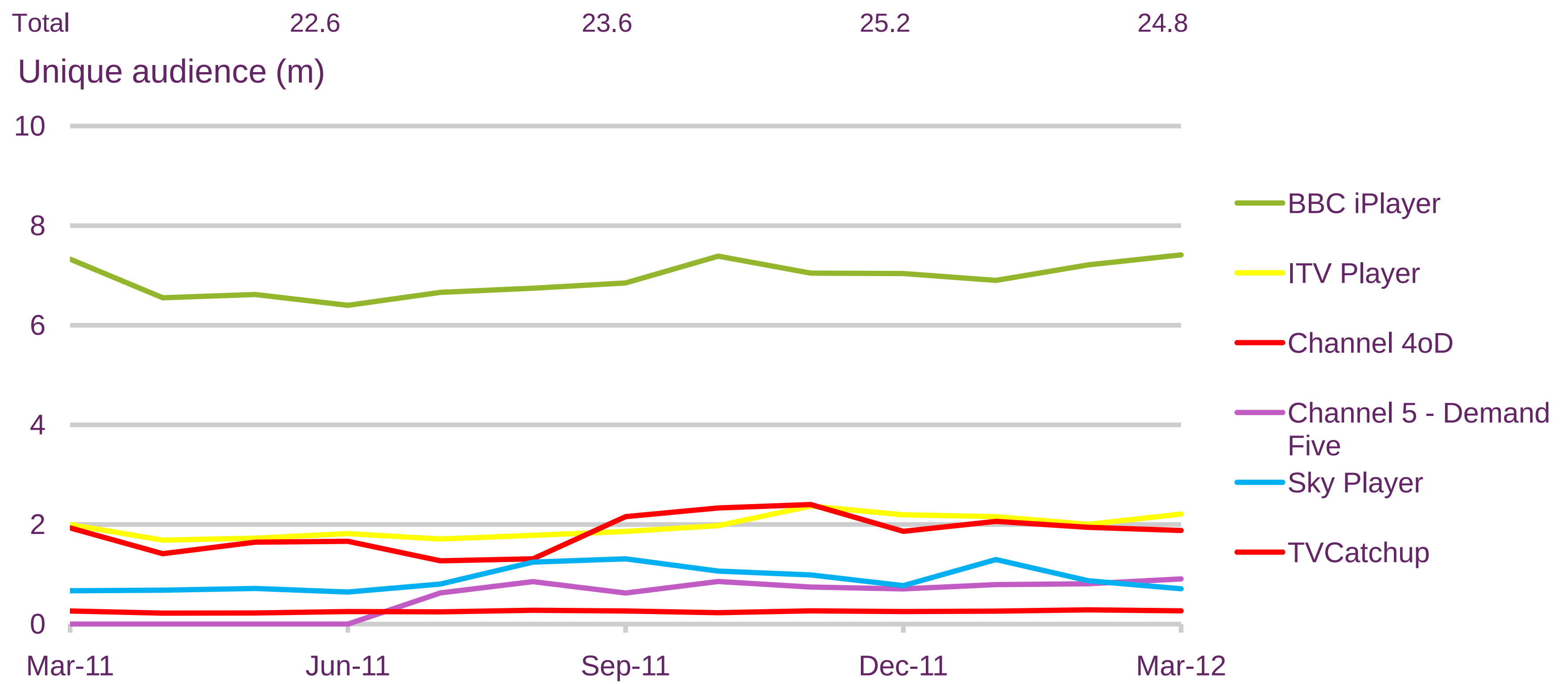
Proportion of adults with home internet who watch online catch-up TV



Source: Ofcom technology tracker Q1 2012
Base: All adults who have the internet at home (n=2823 UK, 423 16-24, 524 25-34, 1113 35-54, 431 55-64, 330 65+, 1367 Male, 1456 Female)
Question: 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?

Figure 2.65

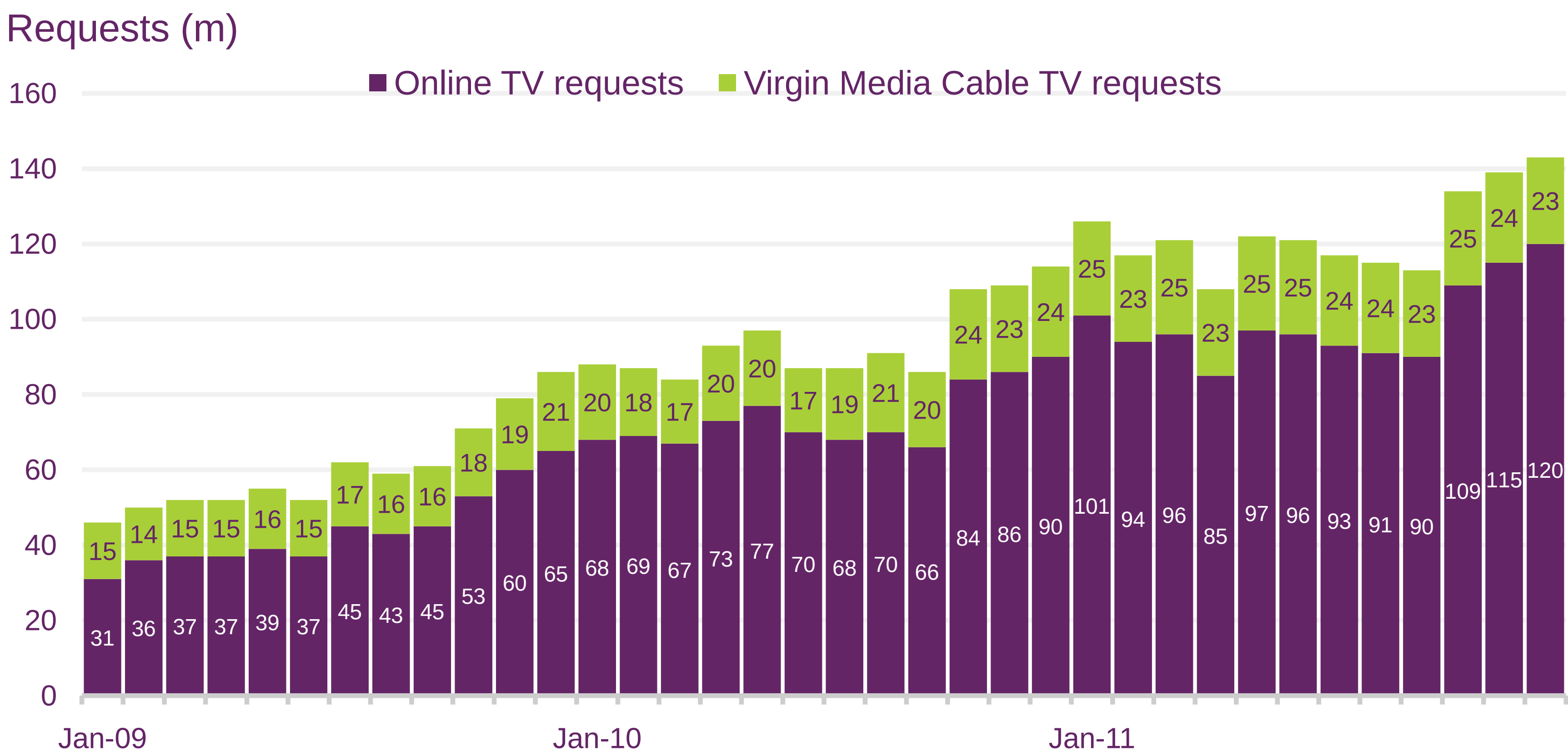
Unique Audience of major online catch-up TV services



Source: UKOM/Nielsen, home and work panel. Note: ‘Active reach’ is the percentage of all active unique persons aged 2+ who visited the site or used the application. ‘Active is defined as anyone who used an internet-enabled computer within the time period. ‘Demand Five trend data not available prior to March 2010 due to change in UKOM definitions.

Figure 2.66

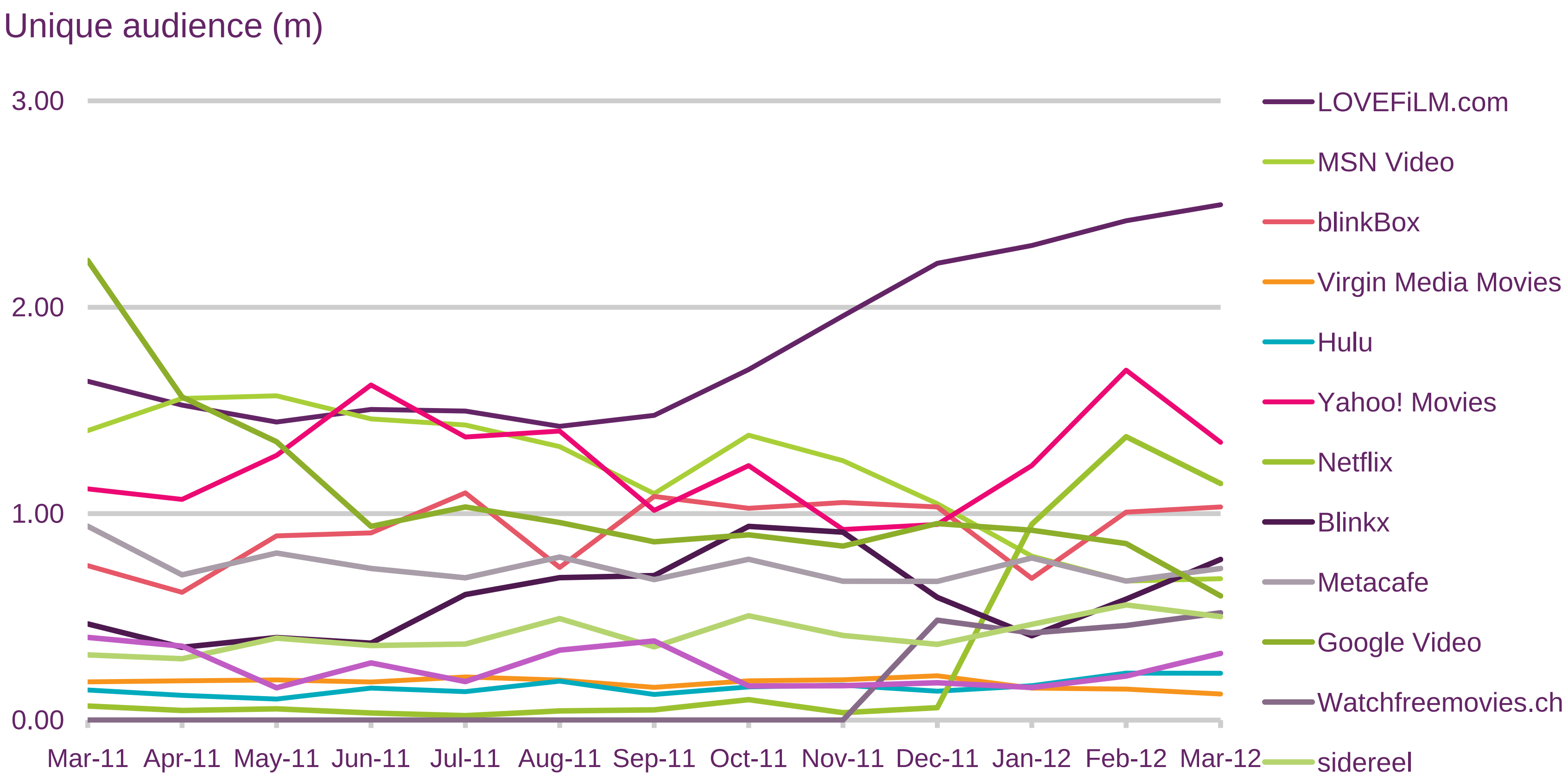
Requests to the BBC iPlayer, by platform



Source: BBC

Figure 2.67

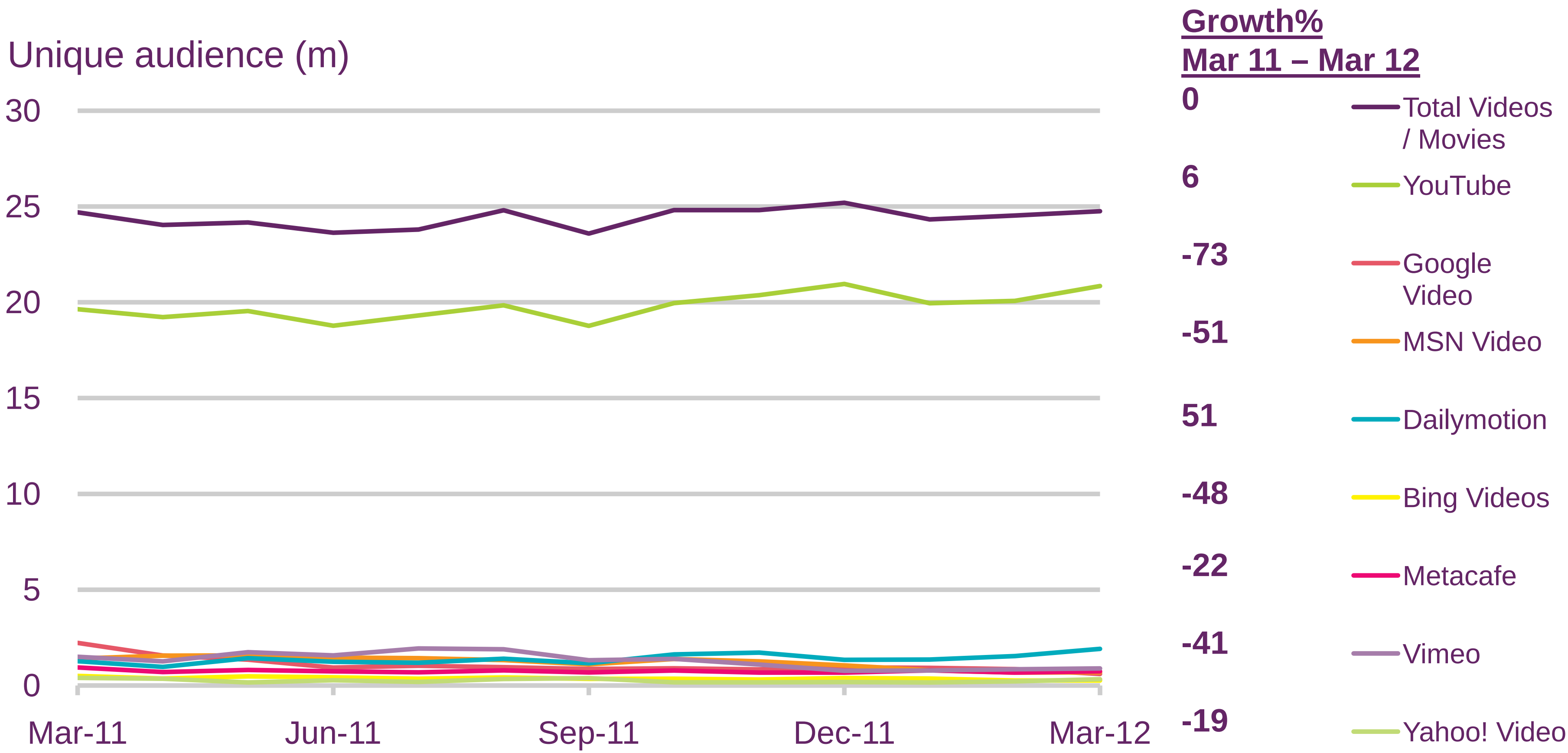
Unique audiences to selected online film and TV sites



Source: UKOM/Nielsen, home and work panel.

Figure 2.68

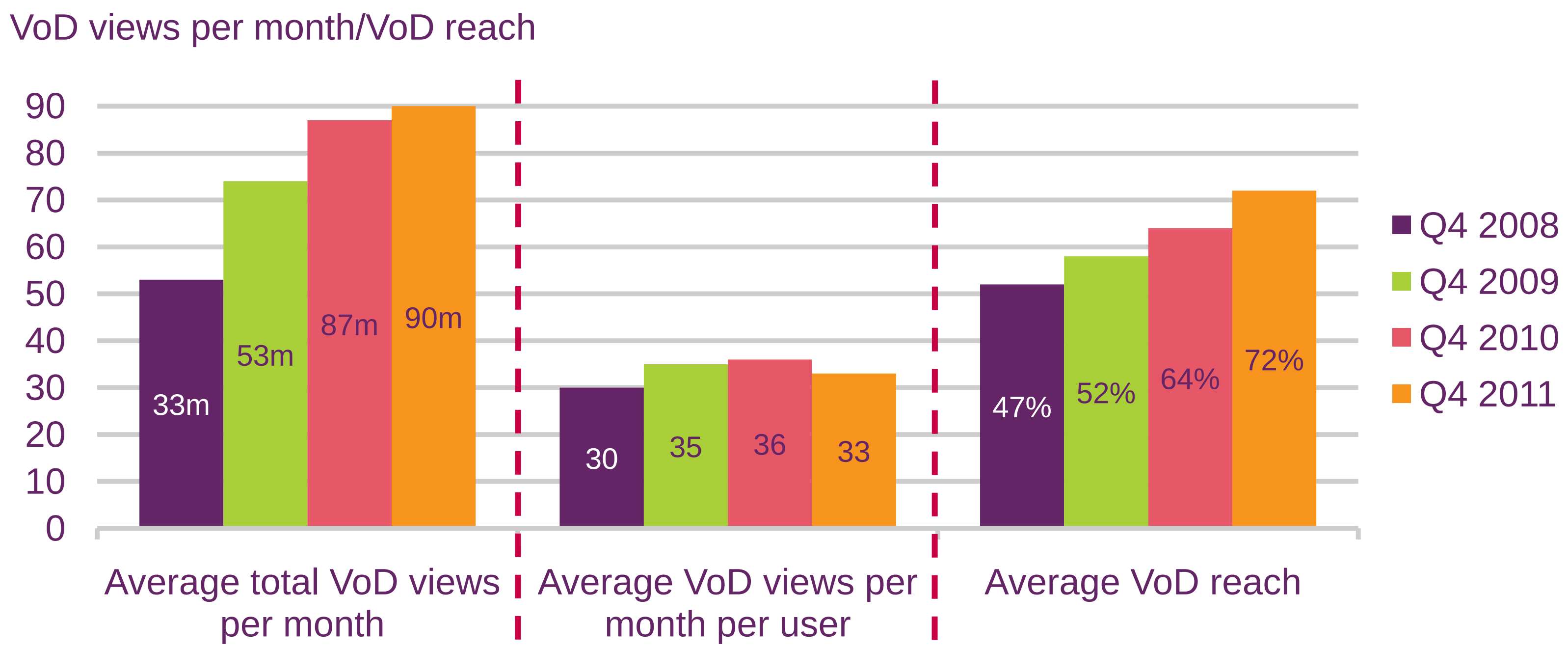
Unique audiences to selected video-sharing sites



Source: UKOM/Nielsen, home and work panel. Note: 'Active reach' is the percentage of all active unique persons aged 2+ who visited the site or used the application. 'Active is defined as anyone who used an internet-enabled computer within the time period.

Figure 2.69

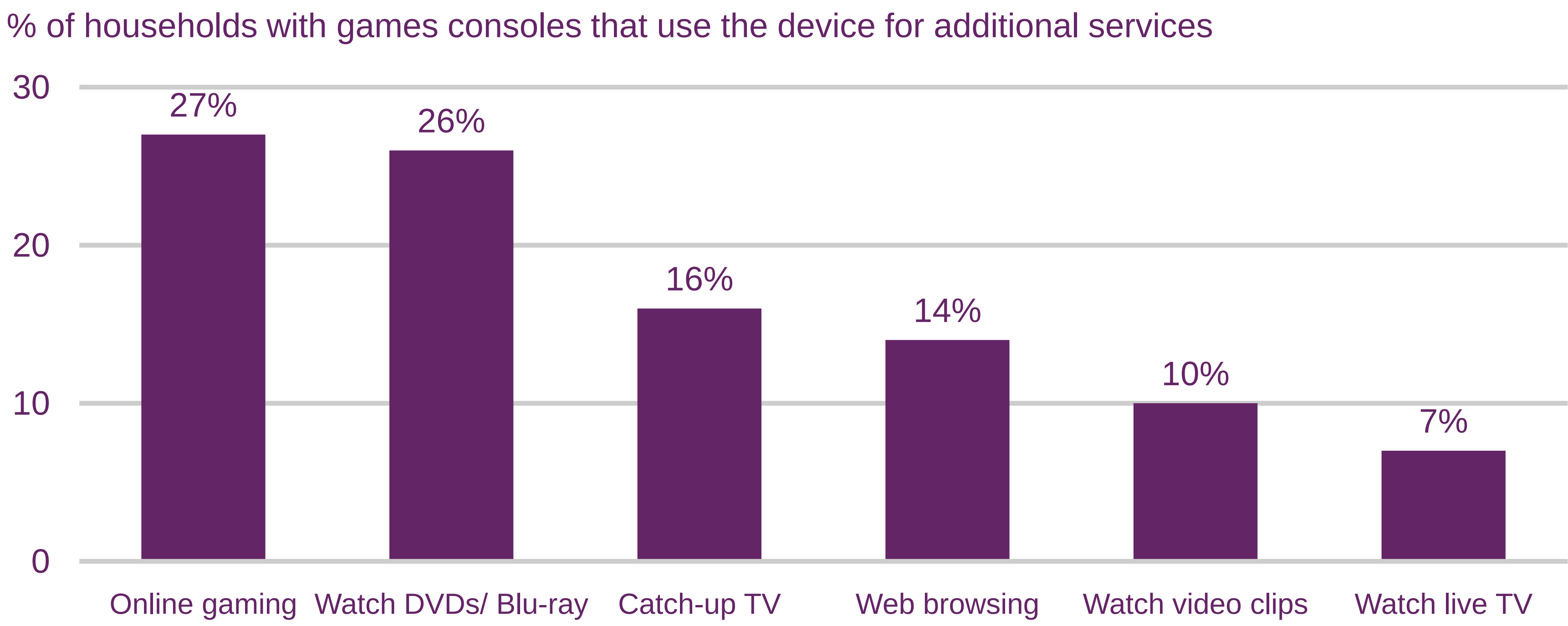
Video on demand (VoD) use in Virgin Media homes



Source: Virgin Media company results 2008-2011.

Figure 2.70

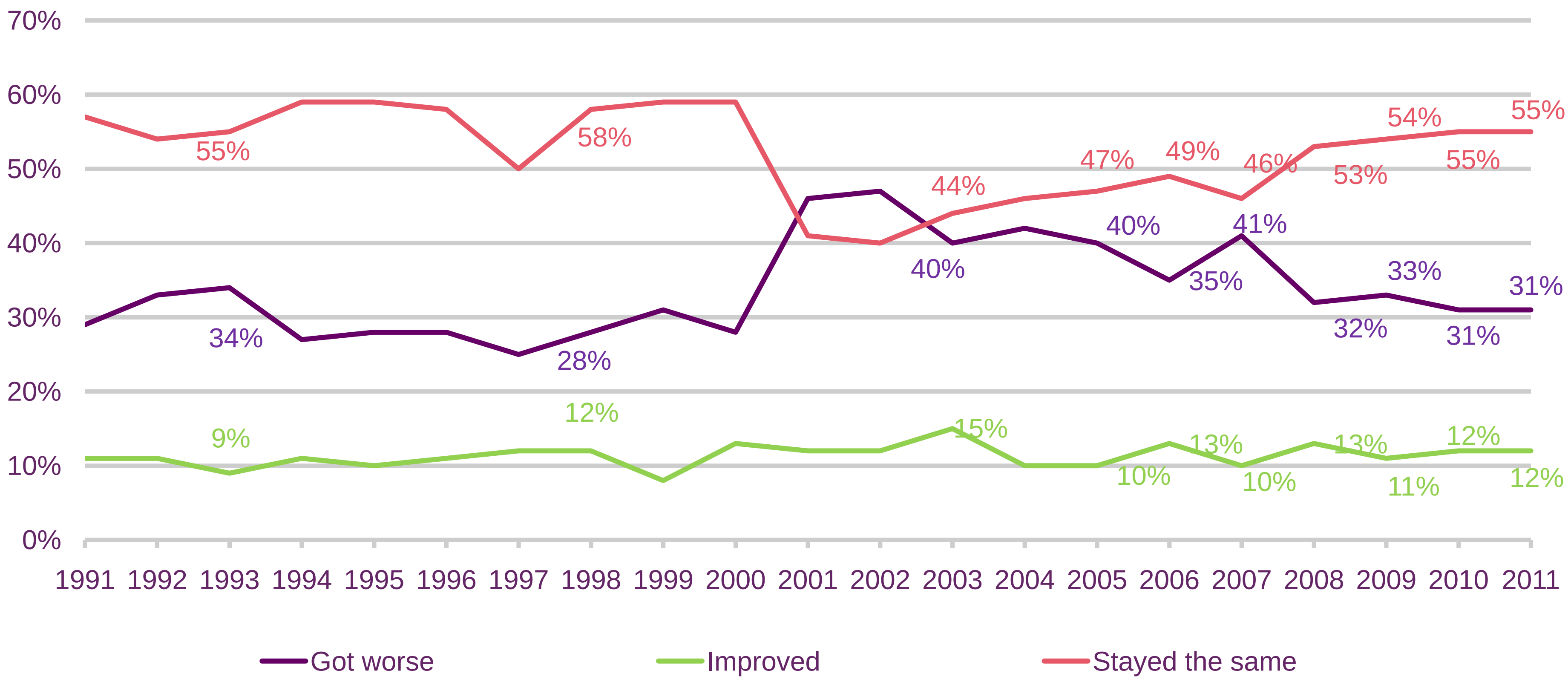
Use of games consoles that use the device for additional services



Source: Ofcom research, Q1 2012
Base: UK adults 16+ who have access to a games console at home (n=1958)
QB5. Which, if any, of these do you use your games console for?

Figure 2.71

Opinions on programme standards over time



Source: Ofcom Media tracker. Base: All with TV, but excluding those never watching (1,723). Q - Do you feel that over the past year television programmes have improved, got worse or stayed about the same?

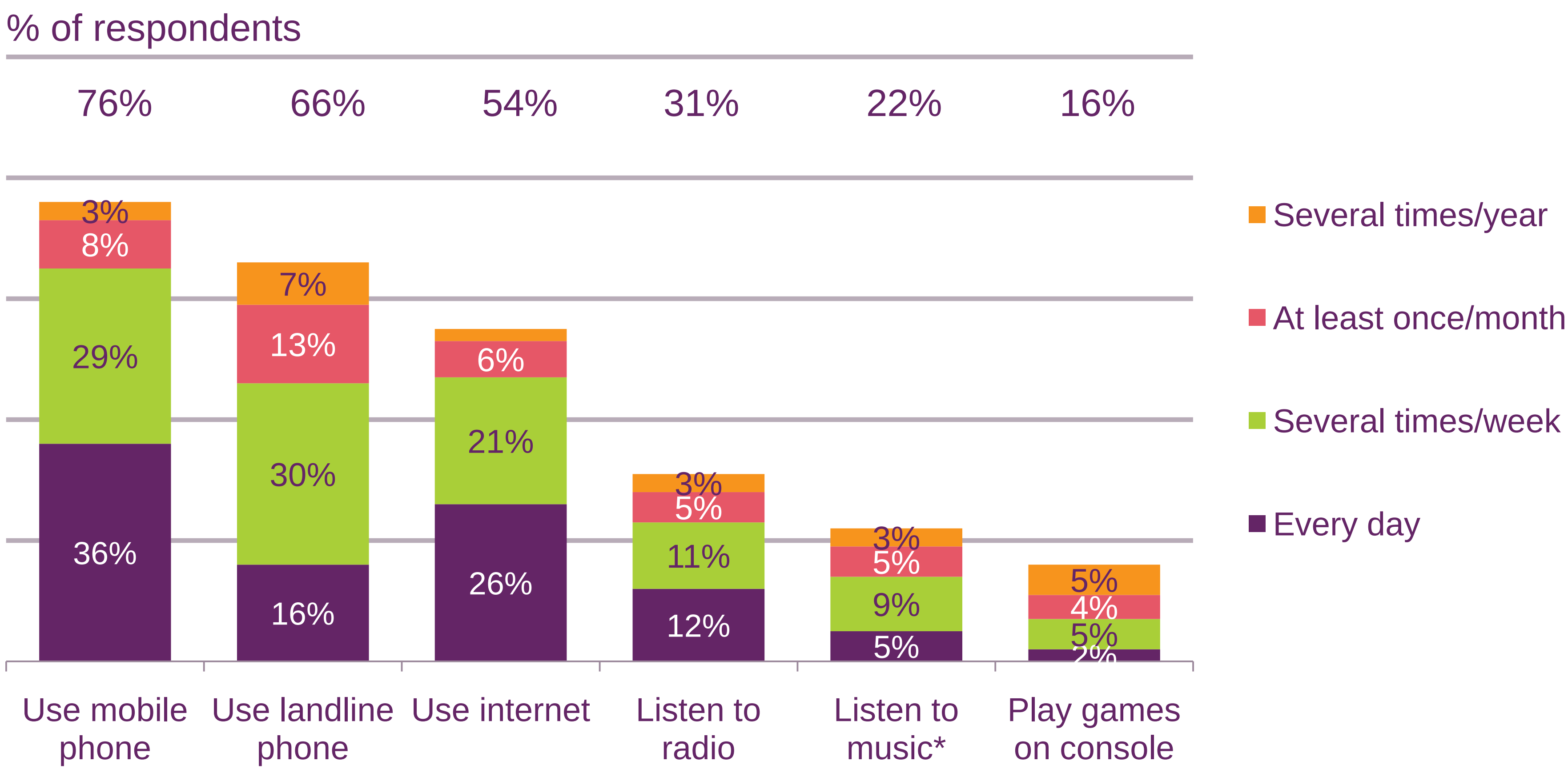
Figure 2.72

Attitudes towards television programme standards 2011, by age

Source: Ofcom Media tracker 2011. Base: All who watch TV (1,723); 16-34 (573); 35-54 (602); 55-64 (223); 65+ (325). Q - Do you feel that over the past year television programmes have improved, got worse or stayed about the same?

Figure 2.73

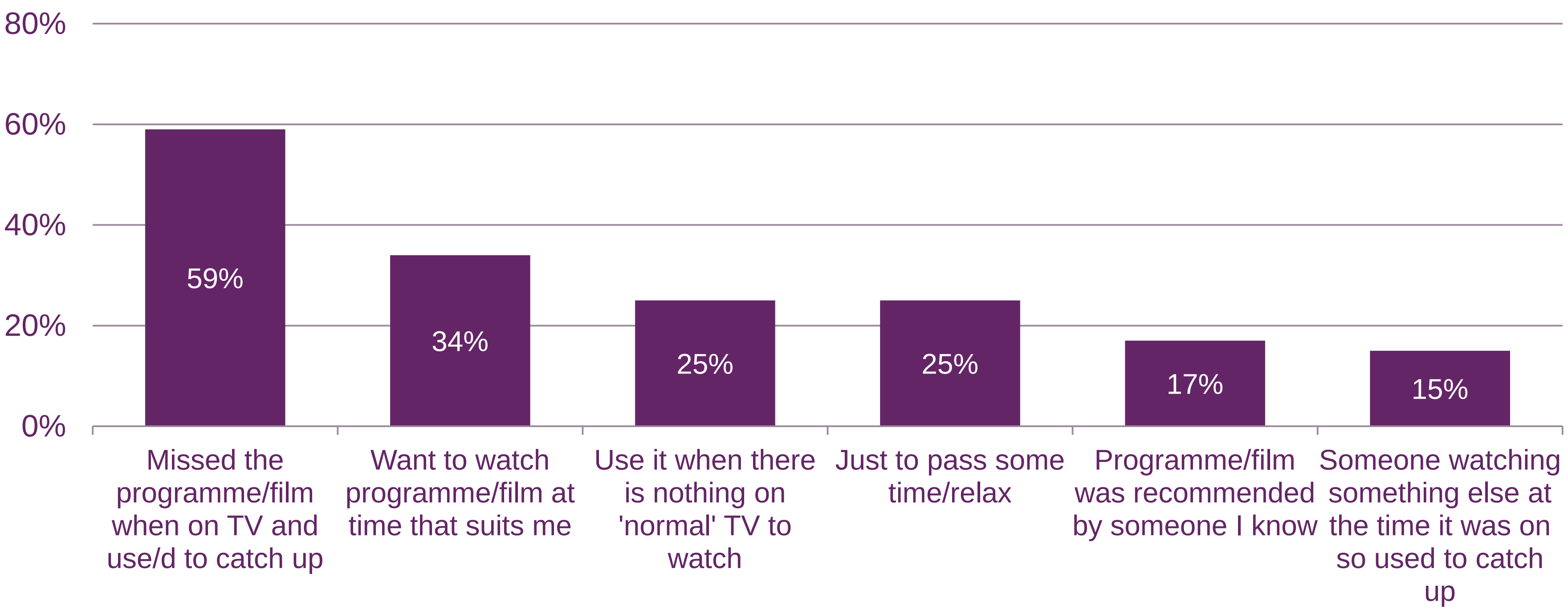
Multi-tasking when watching television



Source: Ofcom Media tracker 2011 Base: All respondents. *On stereo or MP3 player or mobile phone or computer.
Q - At the same time as watching TV on your TV set, how frequently, if at all, do you also do any of the following activities?

Figure 2.74

Reasons for using online TV and film services



Source: Ofcom Media tracker 2011. Base: All who use online ‘video on demand’ (658).
Note: Only responses ≥ 10% charted. All responses unprompted. Q - What would you say are the reasons you use/ used your on demand service, whether you were catching up or accessing other content?