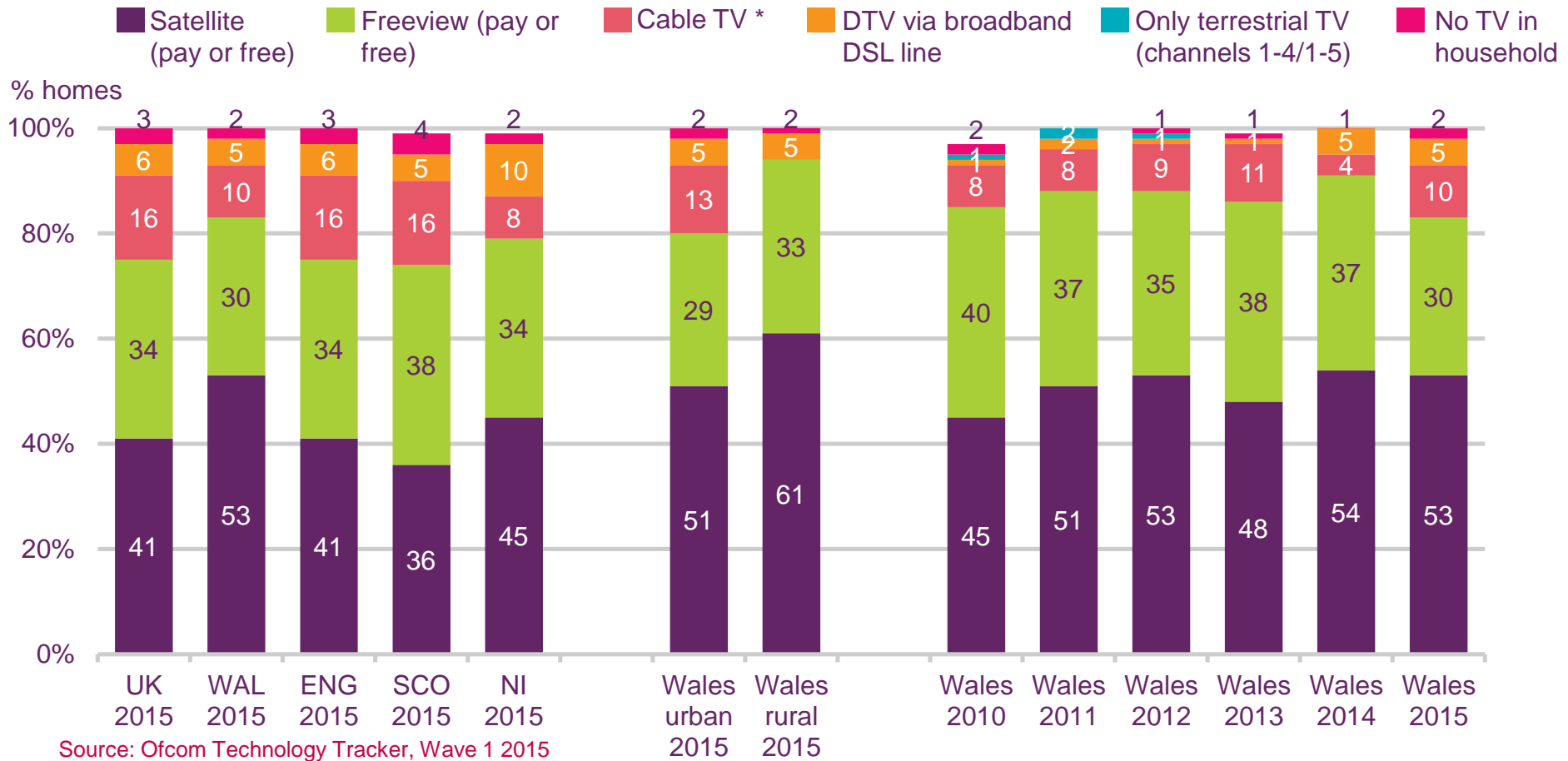


# Television and audio-visual

# Figure 2.1

## Main television set share, by platform



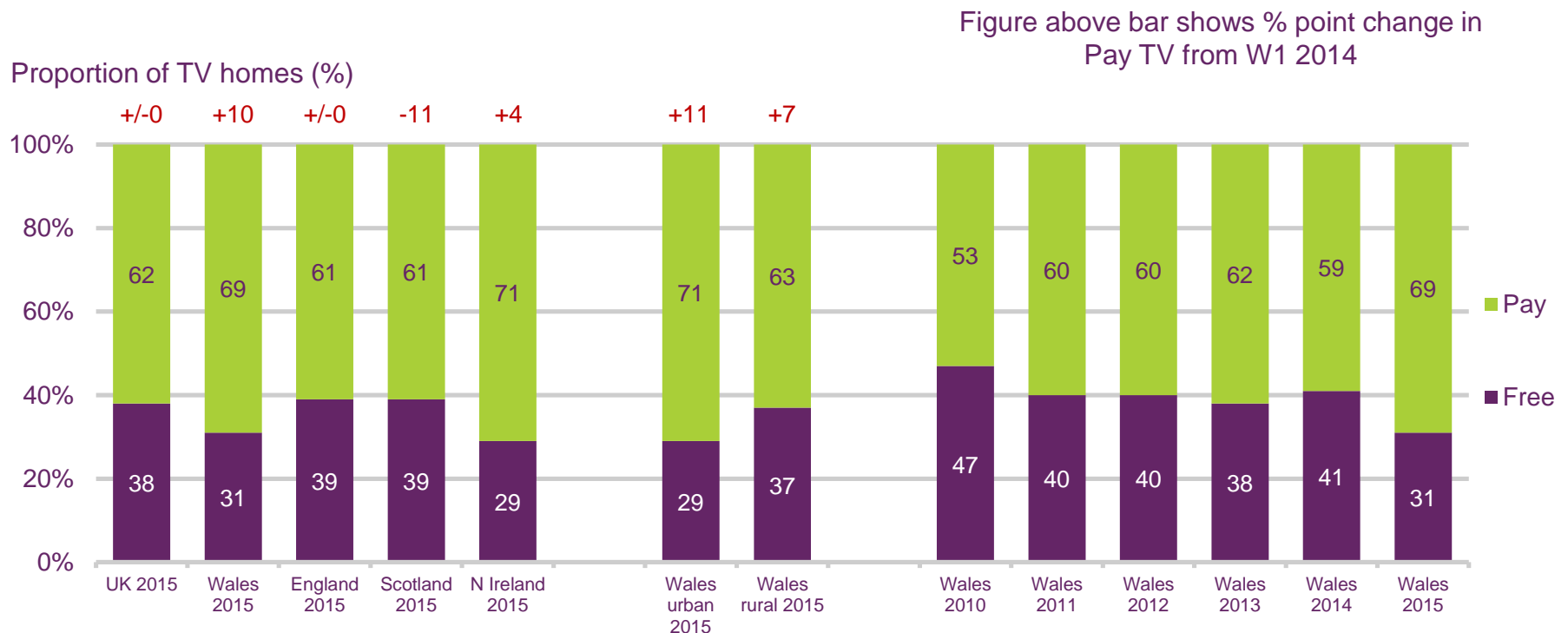
Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015)

QH1a. Which, if any, of these types of television does your household use at the moment?/ QH1b And which of these do you consider is your main type of television? Note:\* See footnote 2

# Figure 2.2

## Proportion of homes with free and pay television



Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ with a TV in household (n = 3616 UK, 485 Wales, 2197 England, 472 Scotland, 462 Northern Ireland, 243 Wales urban, 242 Wales rural, 1060 Wales 2010, 483 Wales 2011, 508 Wales 2012, 485 Wales 2013, 480 Wales 2014, 485 Wales 2015)

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

# Figure 2.3

## Proportion of homes with HD television



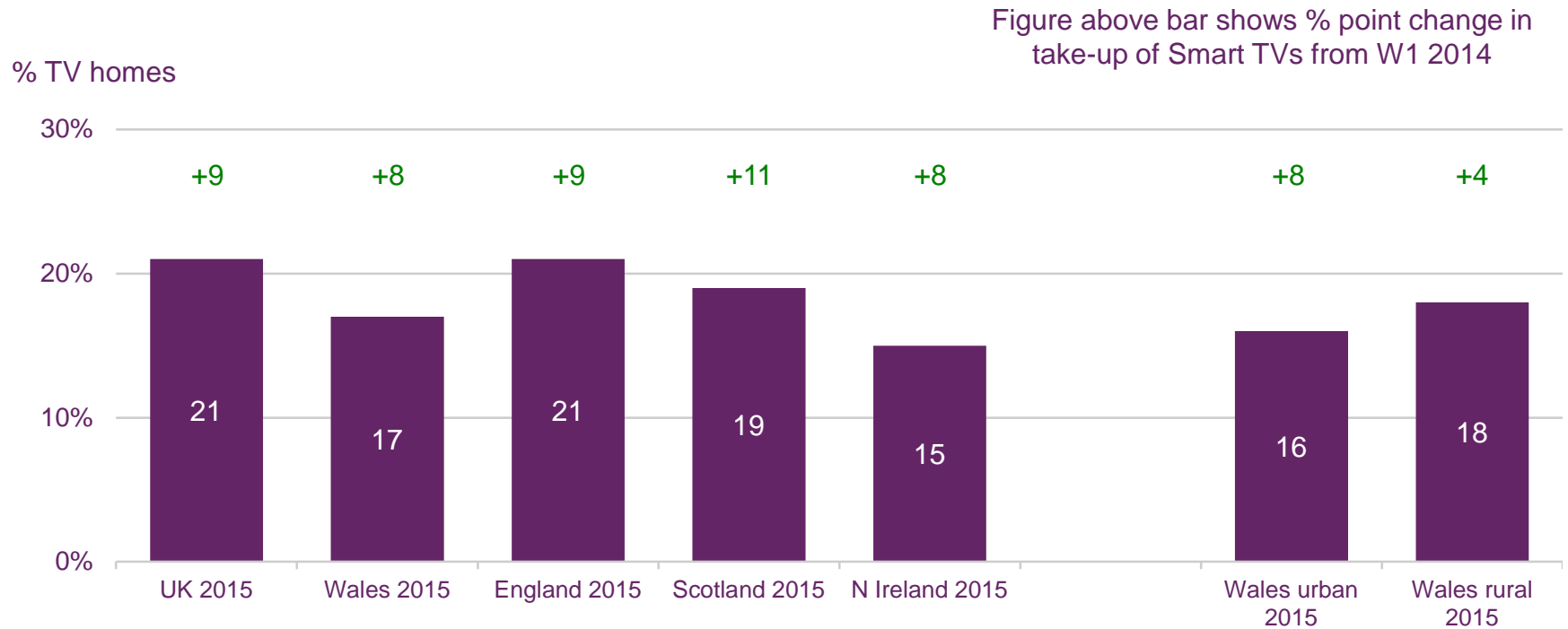
Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 249 Wales urban, 247 Wales rural)

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?

# Figure 2.4

## Smart TV take-up



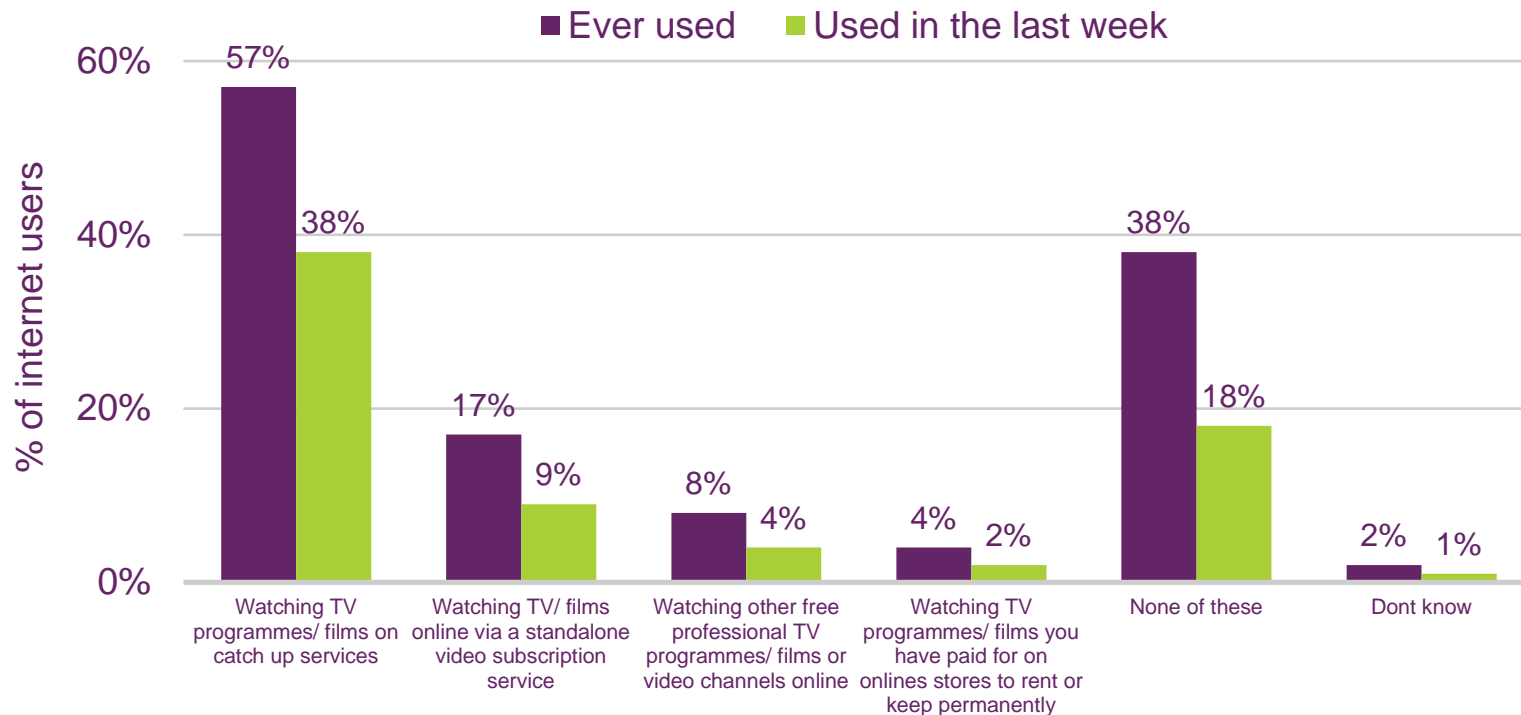
Source: Ofcom Technology Tracker, Wave 1 2015

Base: All adults aged 16+ with a TV in household (n = 3616 UK, 485 Wales, 2197 England, 472 Scotland, 462 Northern Ireland, 243 Wales urban, 242 Wales rural)

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.

## Figure 2.5

### TV programmes, films, demand on any device



Source: Ofcom Technology Tracker, Wave 1 2015

Base: All Wales adults aged 16+ who use the internet at home or elsewhere (n = 413)

QH17 (QH46)/QH18 (QH47): Thinking about your personal use of TV programmes and films online and on demand services that you may use on any device (e.g. smartphone, TV set, tablet or laptop) anywhere, which of the following, if any, have you personally ever used? And which, if any, of these have you used in the last week?

# Figure 2.6

## Average minutes of television viewing per day, by nation: 2014

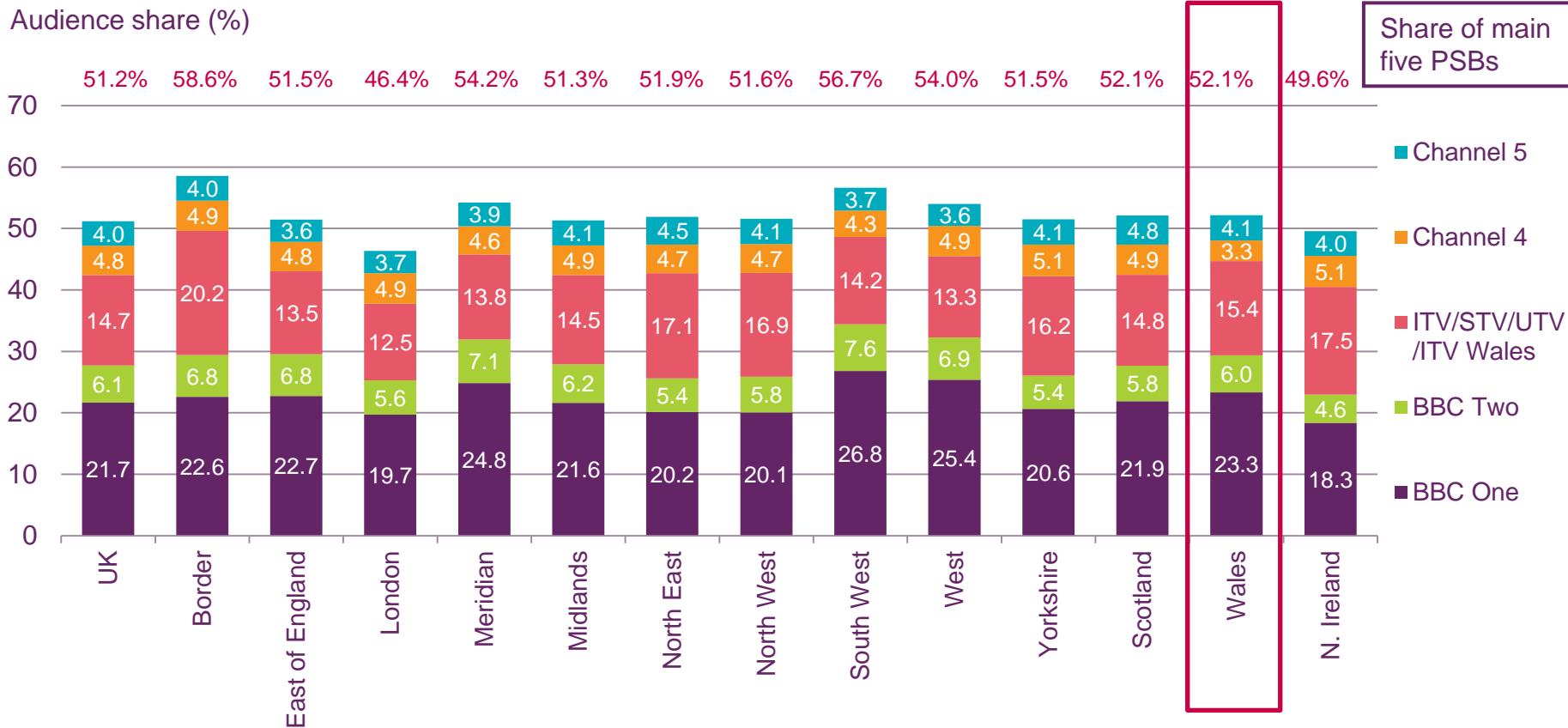


Source: BARB, Individuals (4+). Main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5, including HD variants but excluding +1s. PSB portfolio channels = BBC Three, BBC Four, BBC News, BBC Parliament, CBBC, CBeebies, BBC streaming channels, ITV+1 Network (inc ITV Breakfast), ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV, Channel 4+1, E4, E4 +1, More4, More4 +1, Film4, Film4+1, 4Music, 4seven, Channel 5+1, 5\*, 5\*+1, 5USA, 5USA+1. HD variants are included where applicable.

\*Note: This figure reflects the average across the English regions with the highest in Border at 250 minutes (4 hours 10 minutes) and lowest in West at 197 minutes (3 hours 17 minutes) respectively.

# Figure 2.7

## Share of the main five PSB channels in all homes, by UK nations and regions: 2014



Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

Note: Chart shows figures rounded to one decimal place. Numbers may not appear to sum up to total share of main five PSBs due to rounding.



## Figure 2.8

### Reduction in combined share of the main five PSB channels, all homes: 2009 and 2014



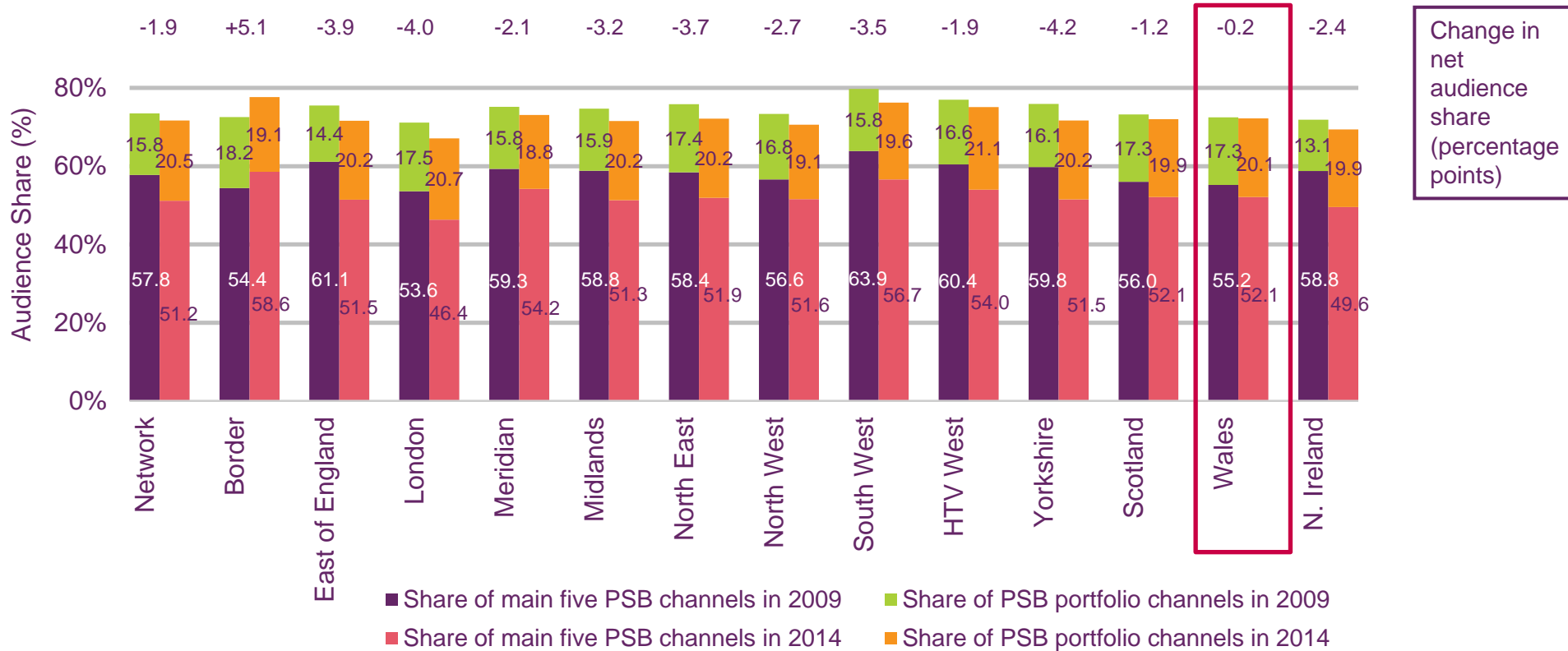
Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

Notes: i) Following digital switchover in Wales in 2010 S4C ceased to carry Channel 4 content. S4C is therefore included in the main five PSB channels in 2009 but not in 2014. S4C's average share in Wales in 2014 is 1.8% ii) 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 2.9



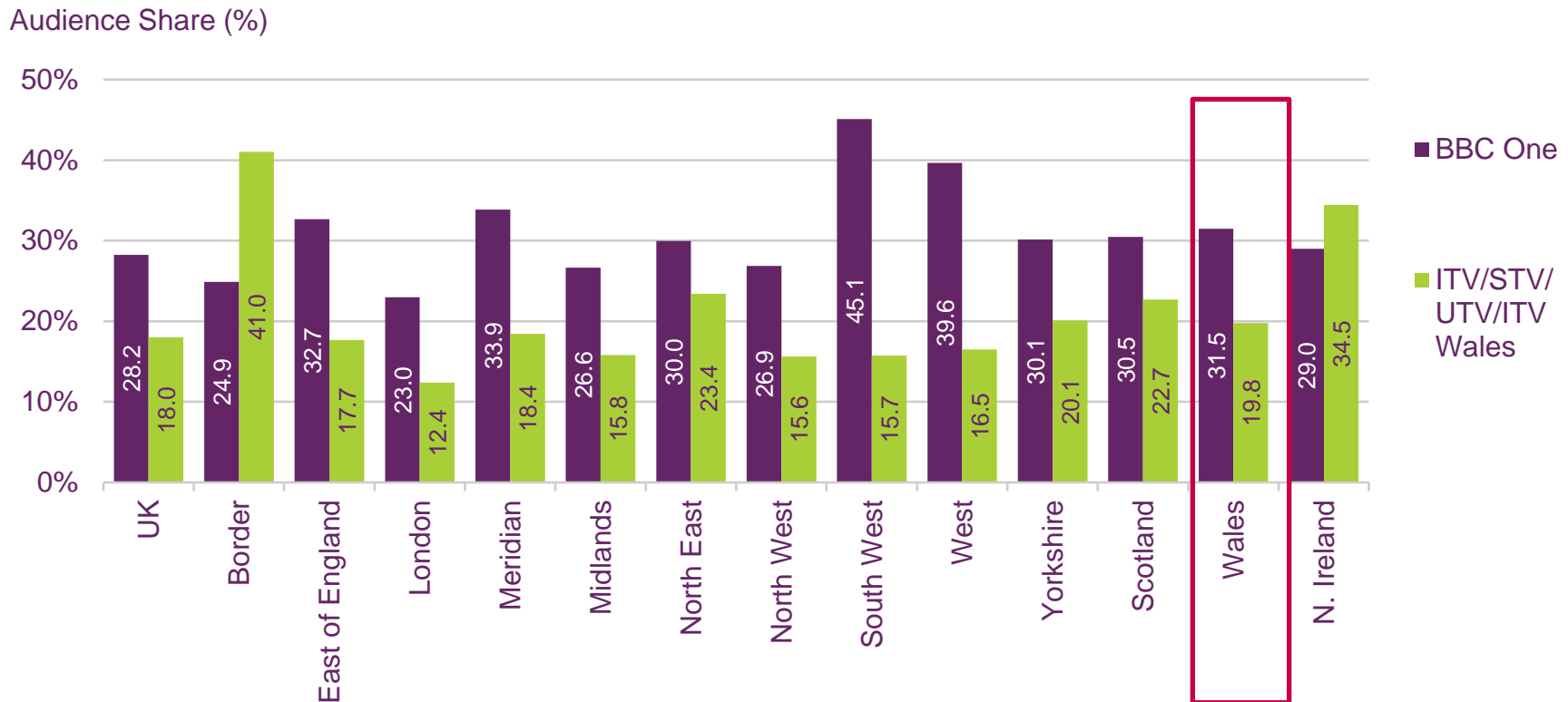
Net change in the audience share of the main five PSB channels and their portfolio channels, all homes: 2009 and 2014



Source: BARB, Individuals 4+. Main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5, including HD variants but excluding +1s. PSB portfolio channels = BBC Three, BBC Four, BBC News, BBC Parliament, CBBC, CBeebies, BBC streaming channels, ITV+1 Network (incITV Breakfast), ITV2, ITV2+1, ITV3, ITV3+1, ITV4, ITV4+1, CITV, Channel 4+1, E4, E4 +1, More4, More4 +1, Film4, Film4+1, 4Music, 4seven, Channel 5+1, 5\*, 5\*+1, 5USA, 5USA+1. HD variants are included where applicable. Notes: i) Following digital switchover in Wales in 2010 S4C ceased to carry Channel 4 content. S4C is therefore included in the main five PSB channels in 2008 but not in 2014. S4C's average share in Wales in 2014 is 0.9% ii) 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 ITV/STV/UTV/ITV Wales early evening news bulletin shares, all homes: 2014

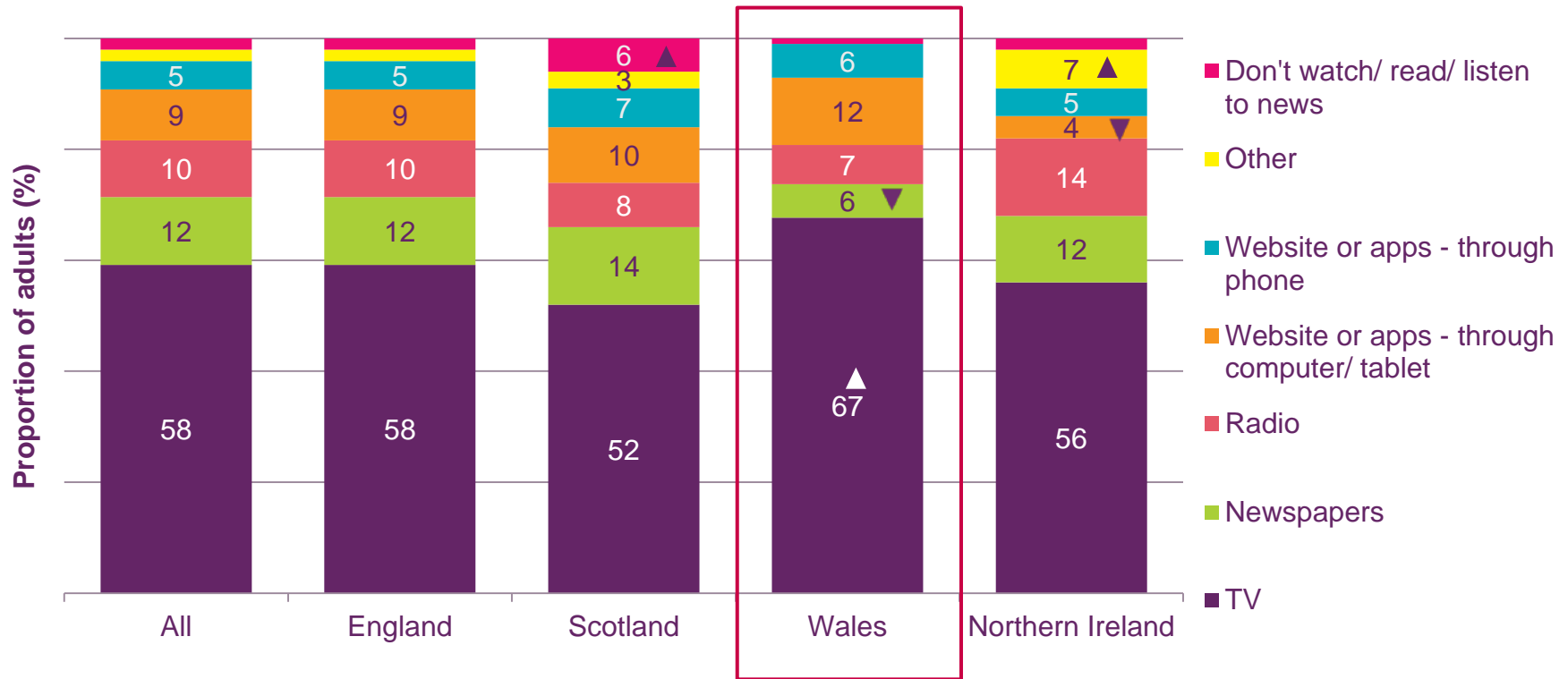


Source: BARB, Individuals (4+). BBC One includes HD variant. ITV excludes HD variants and +1.

Note: Early evening ('local') news bulletin figures based on 'regional news' genre programmes, start time 17:55-18:35, 10mins+ duration, BBC One & ITV (exc HD), weekdays. UK figures based on share to respective early evening news bulletin day part. BBC One's early evening news bulletin is transmitted between 18:30 – 19:00 and ITV/STV/UTV/ITV Wales' is transmitted between 18:00 – 18:30.

# Figure 2.11

## Respondents' main media source for UK and world news by nation: 2014



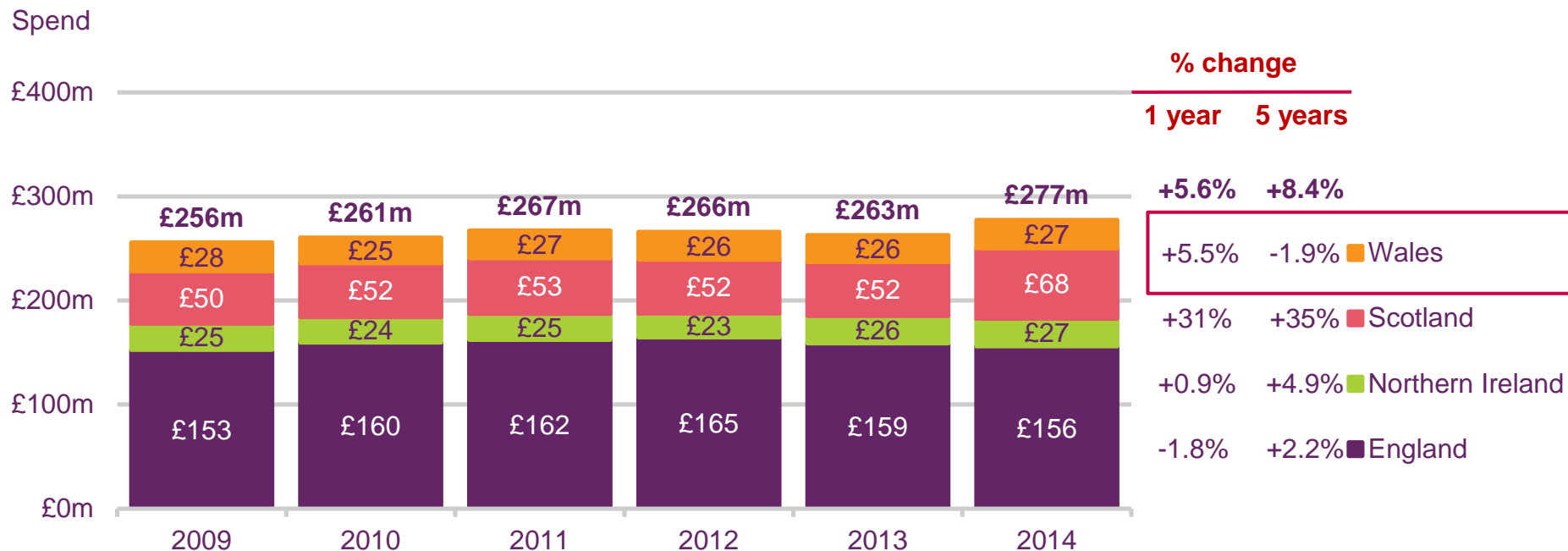
Source: Ofcom Media Tracker 2014.

Base: All (2,074); England (1,577); Scotland (183); Wales (154); Northern Ireland (160). Prompted, single code. Only responses ≥ 3% labelled. Significance testing shows any difference in the main source of news between any nation and all adults.

Q62 - Can you tell me which one of these is your 'main' source of news about what is going on in the UK and in the world today?

# Figure 2.12

Spend on first-run originated nations' and regions' output by the BBC/ITV1/STV/UTV



Source: Broadcasters. All figures are nominal.

Note: Spend data for first-run originations only. Excludes spend on BBC Alba and S4C output but includes some spend on Irish language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England. For more information on S4C, please see Section 2.6.

## Figure 2.13

Change in total spend on nations and regions output, by genre and nation:  
2009-2014

	UK		England		N. Ireland		Scotland		Wales	
	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)
<b>Current Affairs</b>	22%	21%	10%	-1%	28%	43%	49%	61%	16%	29%
<b>News</b>	5%	6%	2%	4%	9%	8%	24%	17%	15%	30%
<b>Non-news/non-current affairs</b>	11%	11%	-2%	119%	-13%	-7%	27%	33%	-2%	-23%
<b>Total Spend in 2014</b>	£285m		£163m		£27m		£69m		£27m	

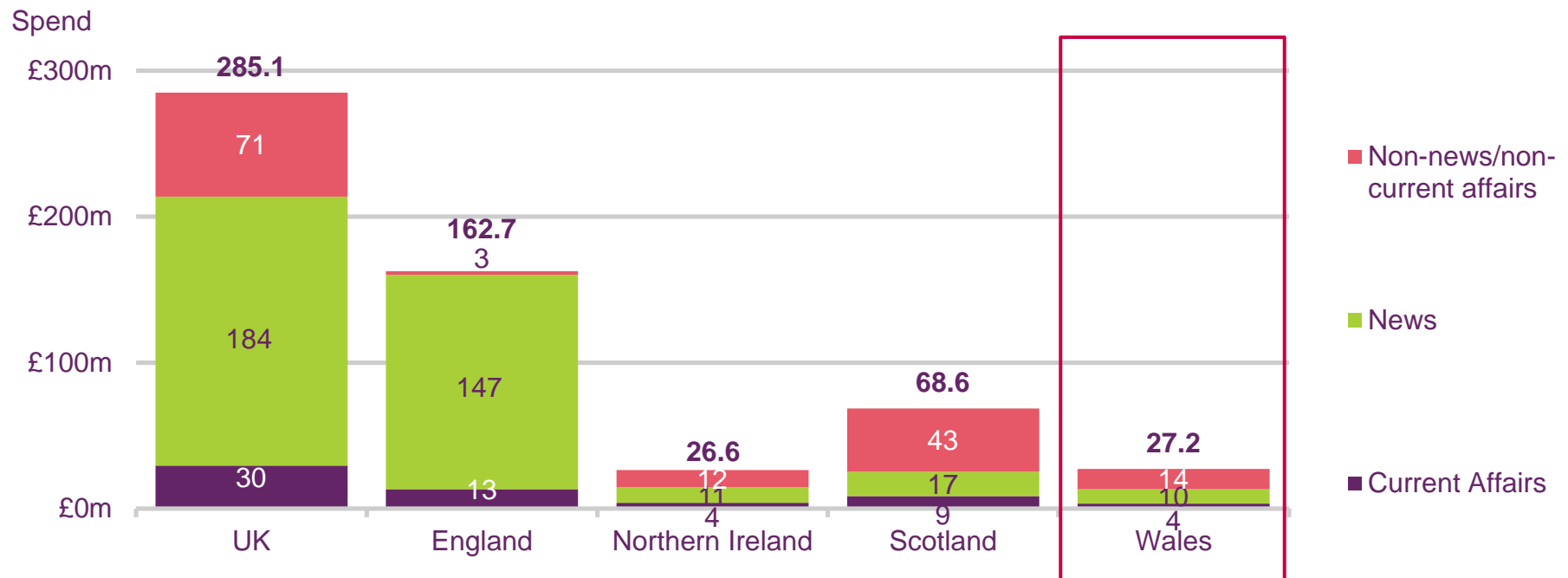
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
<b>Change in Spend</b>	8%	9%	2%	4%	0%	5%	29%	32%	6%	-3%

Source: Broadcasters. All figures are nominal.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England.

## Figure 2.14

Total spend by the BBC/ ITV1/ STV/ UTV on non-network nations/regions output for the main PSB channels (BBC1 and Channel 3): 2014

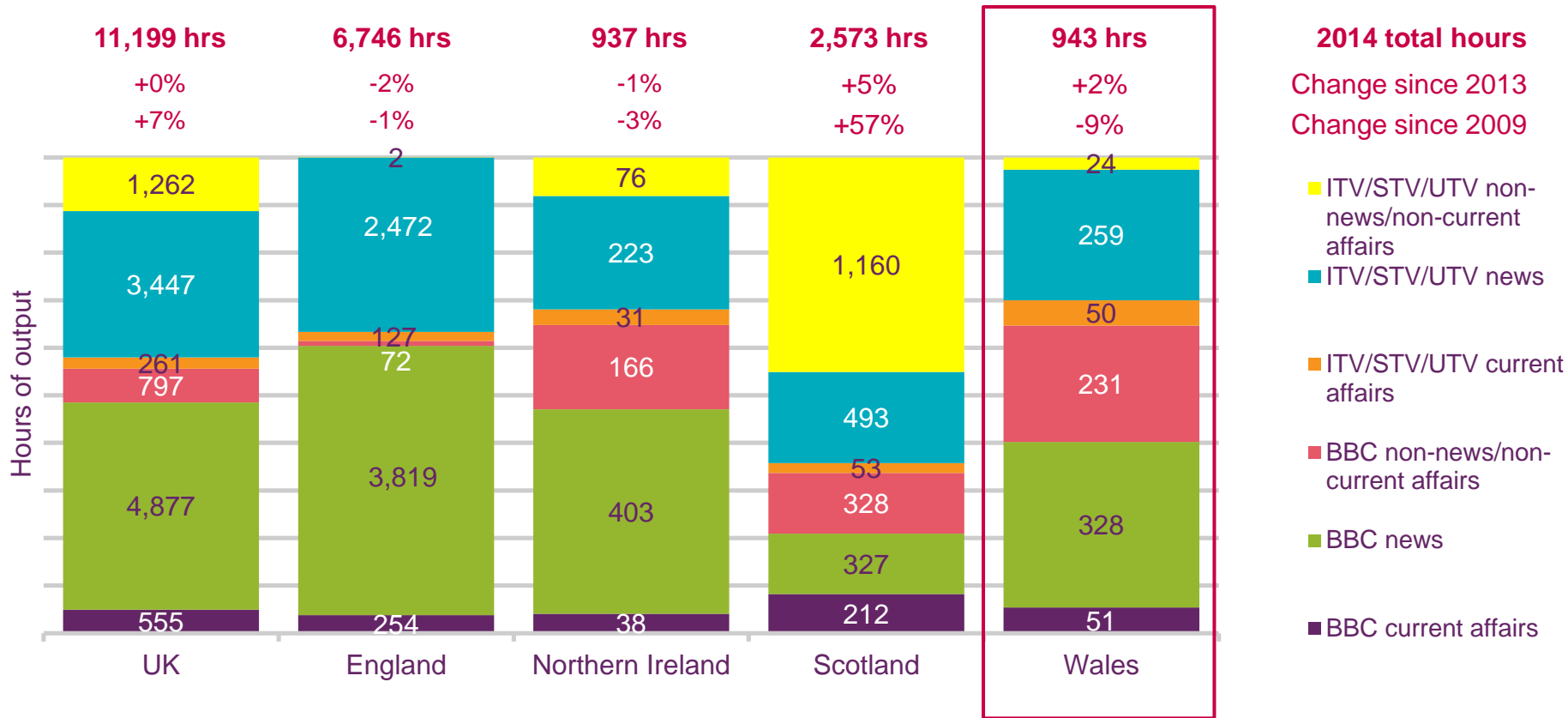


Source: Broadcasters.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England.

# Figure 2.15

## First-run originated hours of nations/regions output, by genre and broadcaster: 2014



Source: Broadcasters.

Note: Hours data for first-run originations only. Excludes hours for BBC Alba and S4C output but includes some hours of Irish language programming by the BBC. These figures do not include hours of network content. Hours broadcast in the ITV Border region are included under England.



# Figure 2.16

Cost per hour for total nations' and regions' output, by nation: 2009-2014



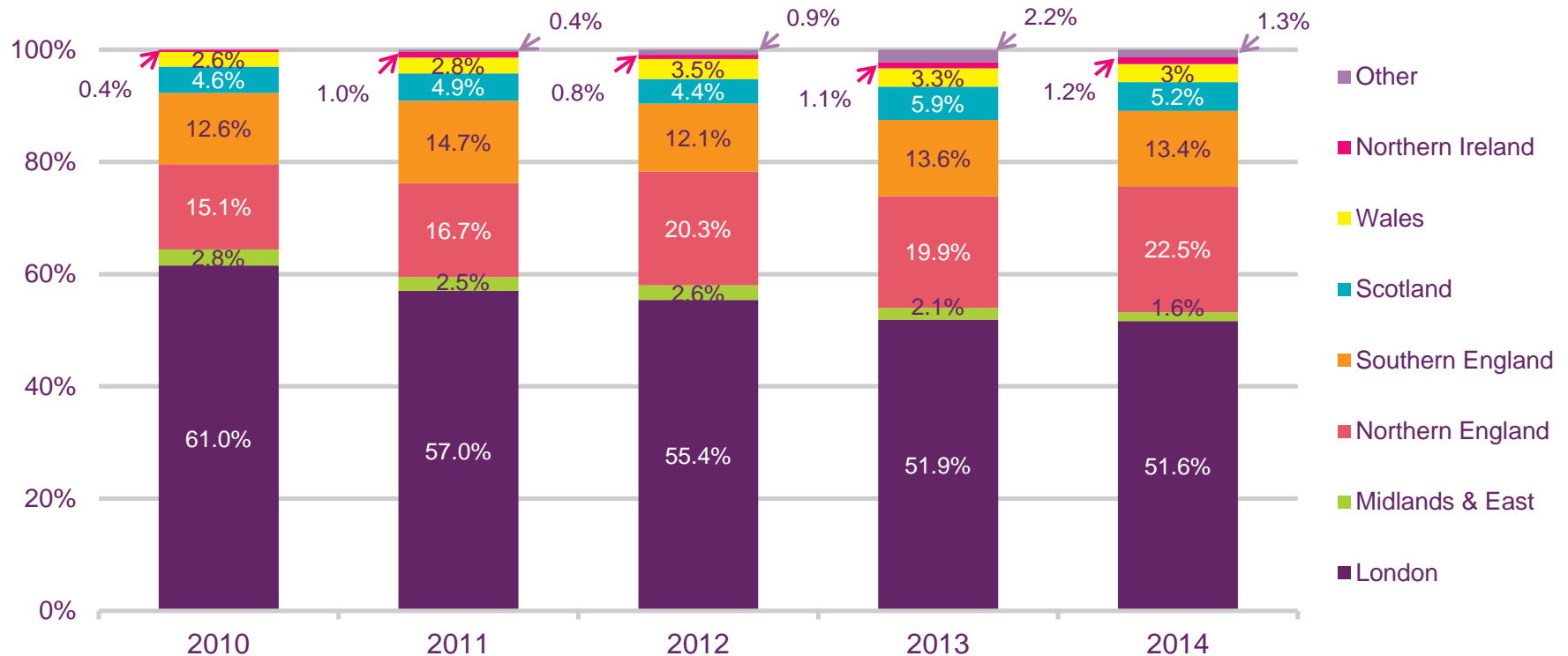
Source: Broadcasters. All figures are nominal.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is included under England.

# Figure 2.17

## Expenditure on originated network productions: 2010–2014

Percentage of production by value



Source: Ofcom/broadcasters

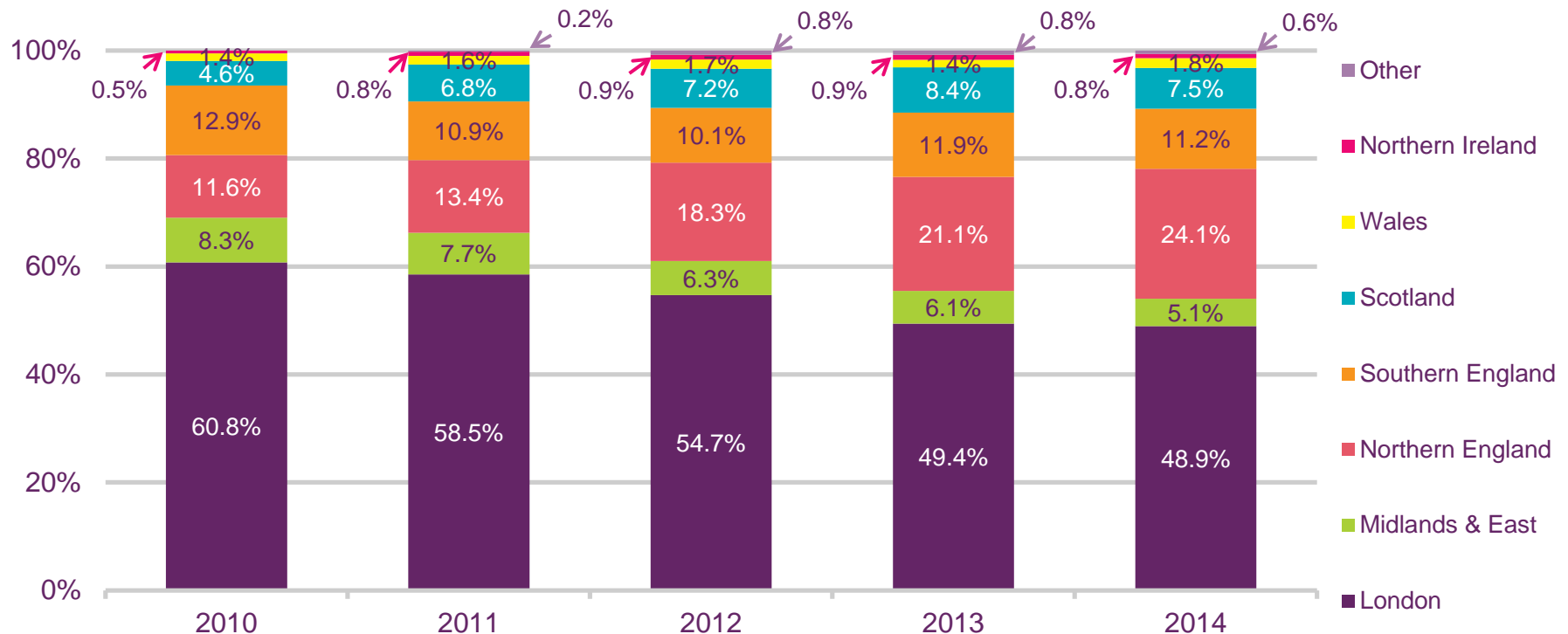
Note: This expenditure does not include network news production. The category 'Other' refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of offscreen talent spend was outside the M25 but not all in one macro-region and therefore cannot be attributed to a single region.

See [http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg\\_prod/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on Ofcom website for further details

# Figure 2.18

## Volume of originated network productions: 2010–2014

Percentage of production by volume



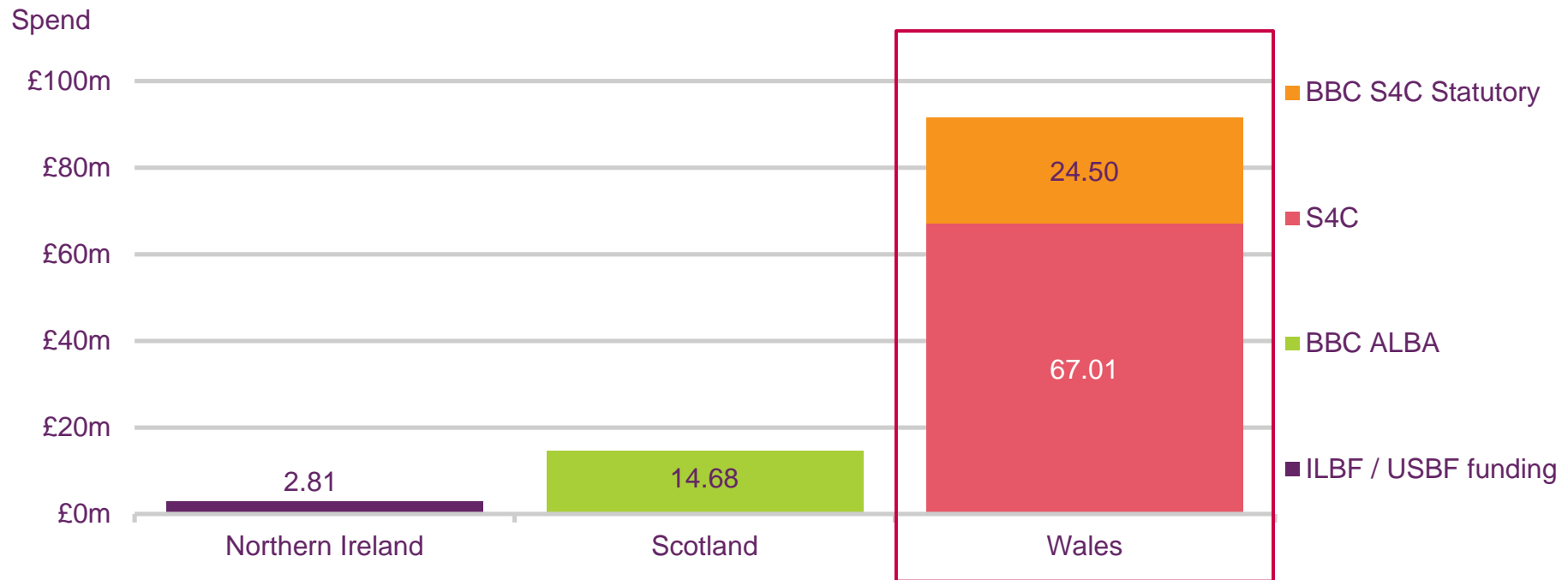
Source: Ofcom/broadcasters

Note: These hours do not include network news production. The category 'Other' refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of offscreen talent spend was outside the M25 but not all in one macro-region and therefore cannot be attributed to a single region.

See [http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg\\_prod/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on the Ofcom website for further details.

# Figure 2.19

## Other spend on other programming in the devolved nations: 2014



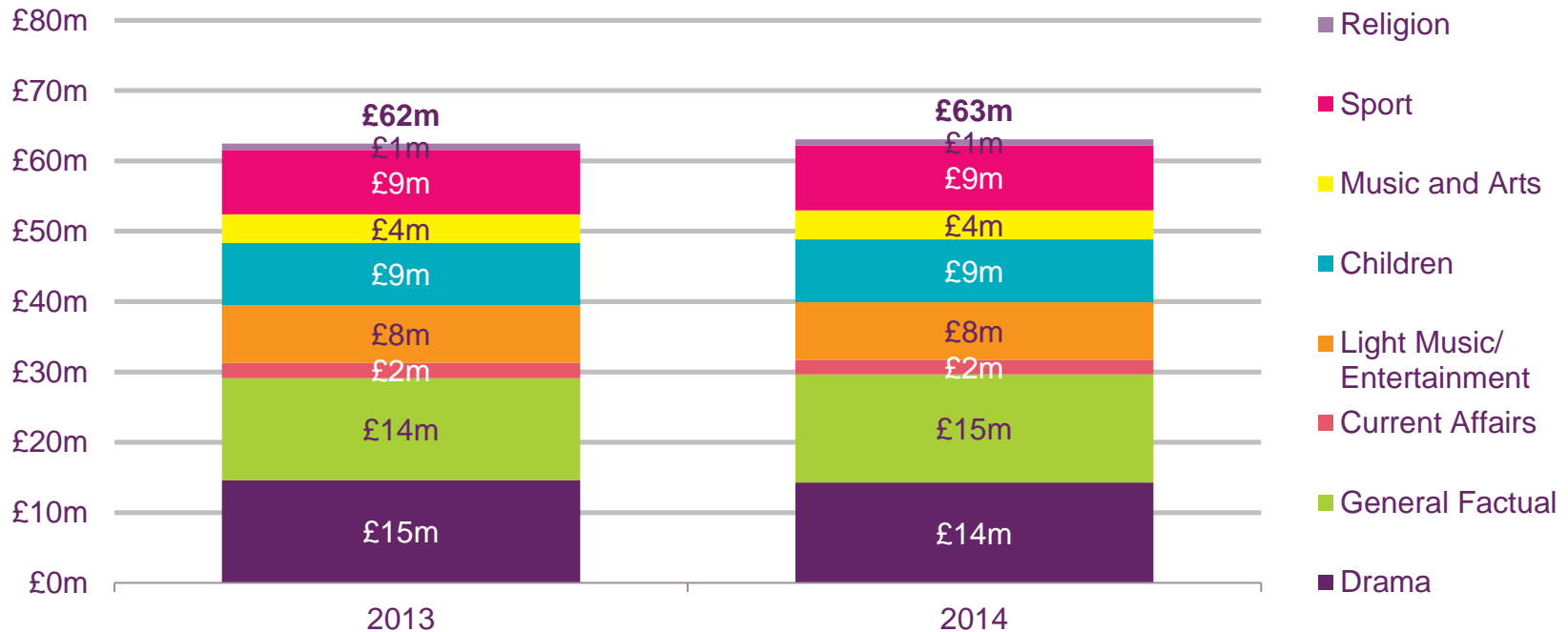
Source: Broadcasters.

Note: BBC S4C Statutory refers to the cost to the BBC of programming supplied to S4C by the BBC as part of their statutory agreement. ILBF / USBF refers to additional production contributions by the Irish Language Broadcast Fund and the Ulster Scots Broadcast Fund. S4C figures cover the 2014/2015 financial year, BBC ALBA and ILBF / USBF figures cover the 2014 calendar year.

# Figure 2.20

## Spend by S4C on first-run Welsh language programming

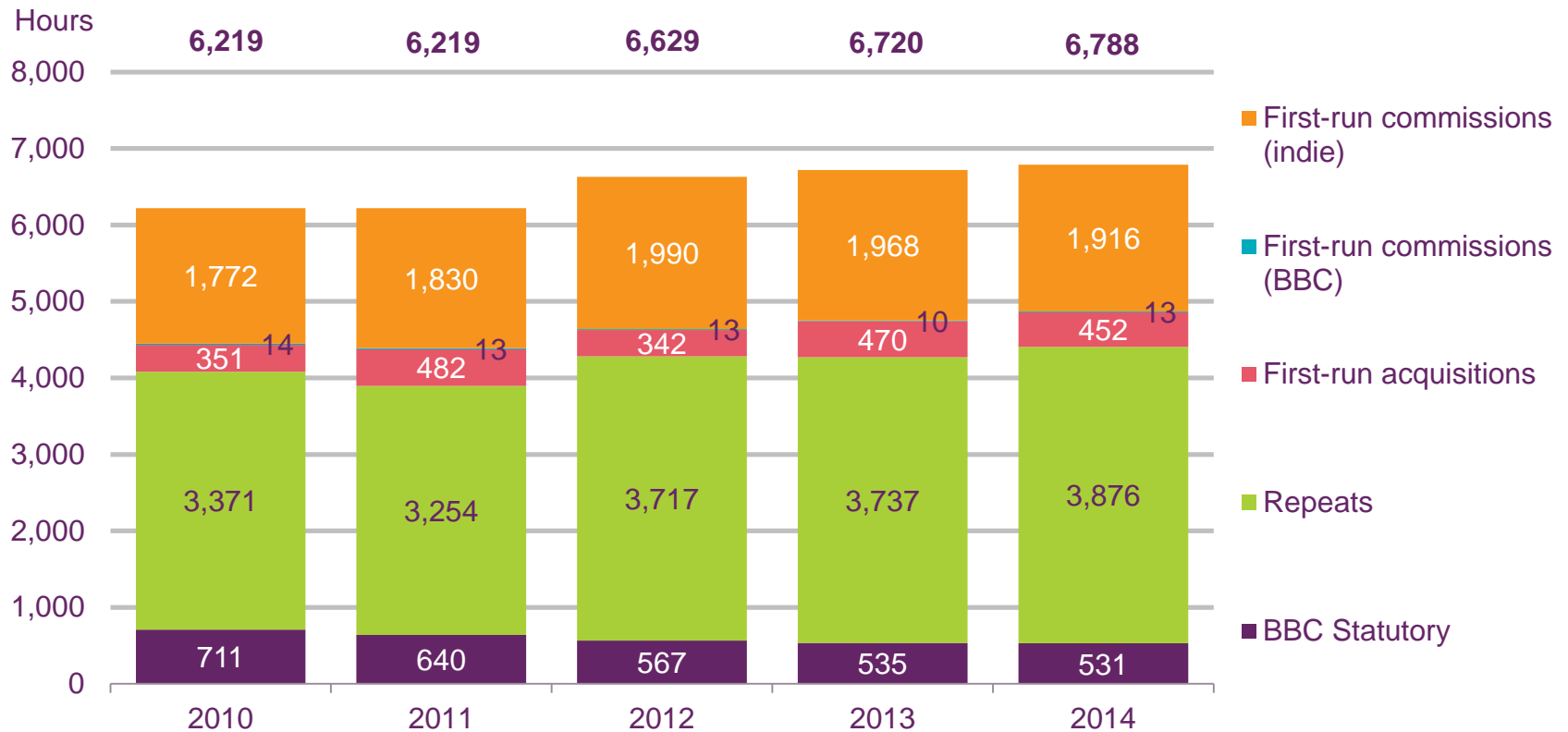
Spend on Welsh language programming



Source: S4C. All figures are expressed in nominal terms. Note: Does not include programming provided by the BBC under the statutory obligation.

# Figure 2.21

## Type of Welsh-language output on S4C, by hours



Source: S4C.