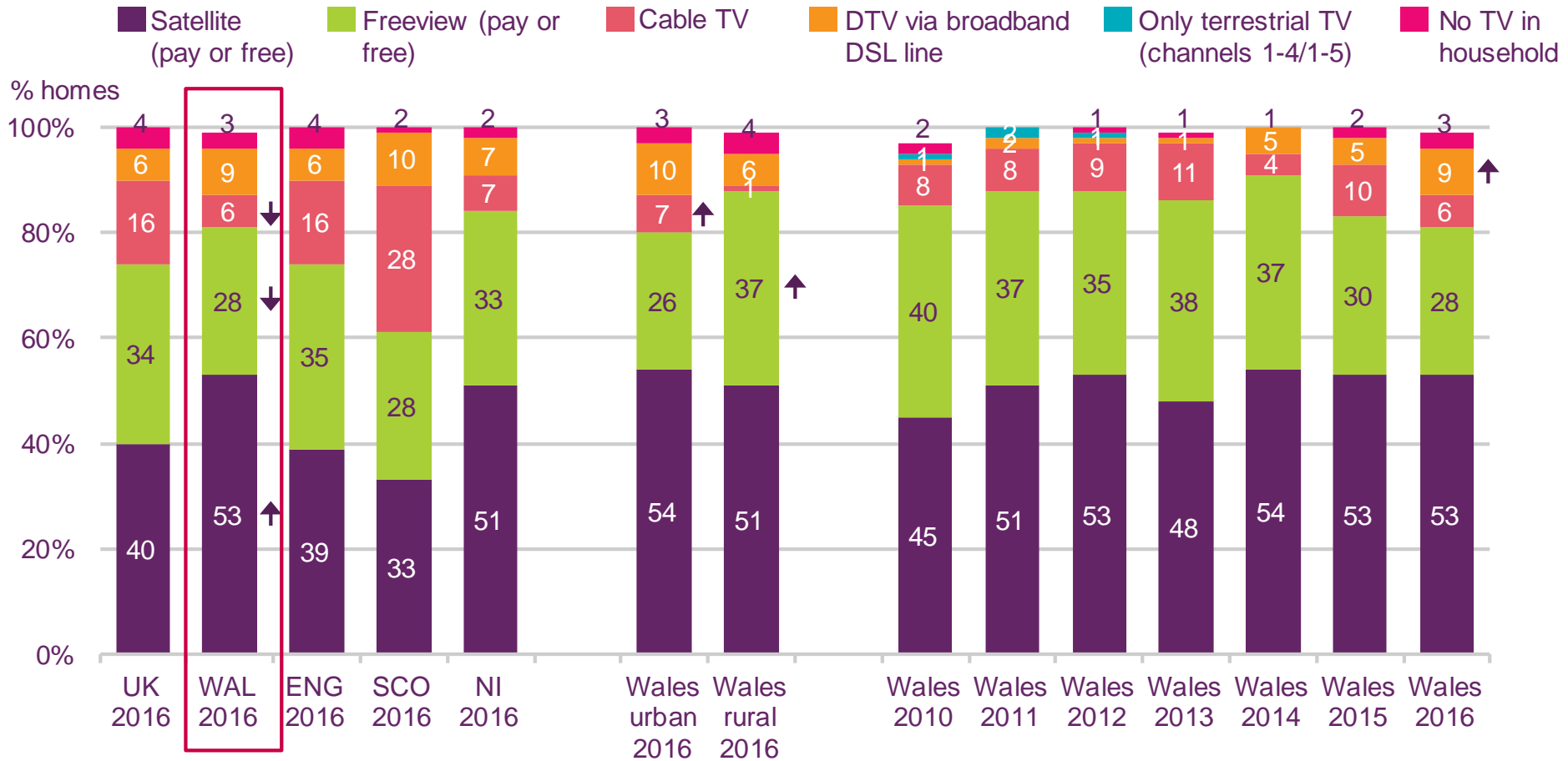


2. TV and audio-visual

Figure 2.1

Main TV set share by platform



Source: Ofcom Technology Tracker, Half 1 2016

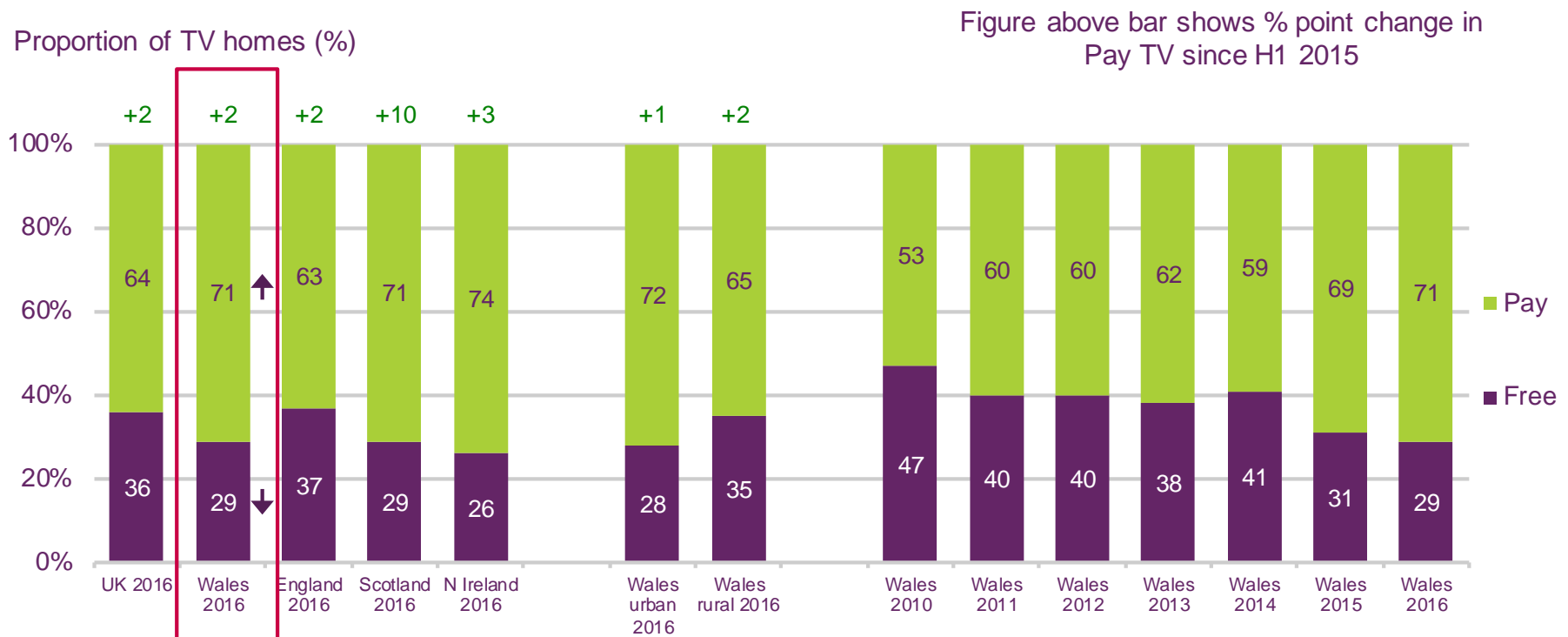
Base: All adults aged 16+ (n = 3737 UK, 489 Wales, 2239 England, 502 Scotland, 507 Northern Ireland, 240 Wales urban, 249 Wales rural, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013, 491 Wales 2014, 496 Wales 2015, 489 Wales 2016)

Significance testing: Arrows indicate any significant differences between Wales and UK in 2016, between Wales urban and rural in 2016 and between Wales 2015 and 2016

QH1A: Which, if any, of these types of television does your household use at the moment?

Figure 2.2

Proportion of homes with free and pay television



Source: Ofcom Technology Tracker, Half 1 2016

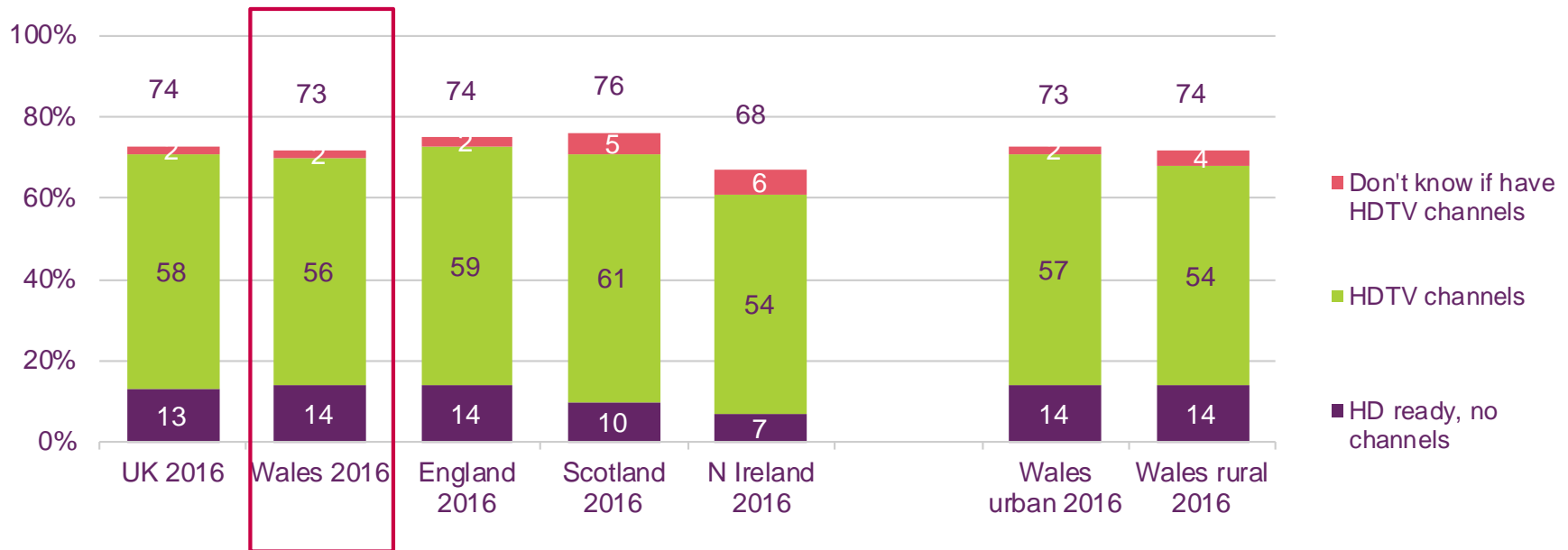
Base: All adults aged 16+ with a TV in household (n = 3606 UK, 471 Wales, 2148 England, 491 Scotland, 496 Northern Ireland, 231 Wales urban, 240 Wales rural, 1060 Wales 2010, 483 Wales 2011, 508 Wales 2012, 485 Wales 2013, 480 Wales 2014, 485 Wales 2015, 471 Wales 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2016, between Wales urban and rural in 2016 and between Wales 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Wales, urban and rural.

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, Half 1 2016

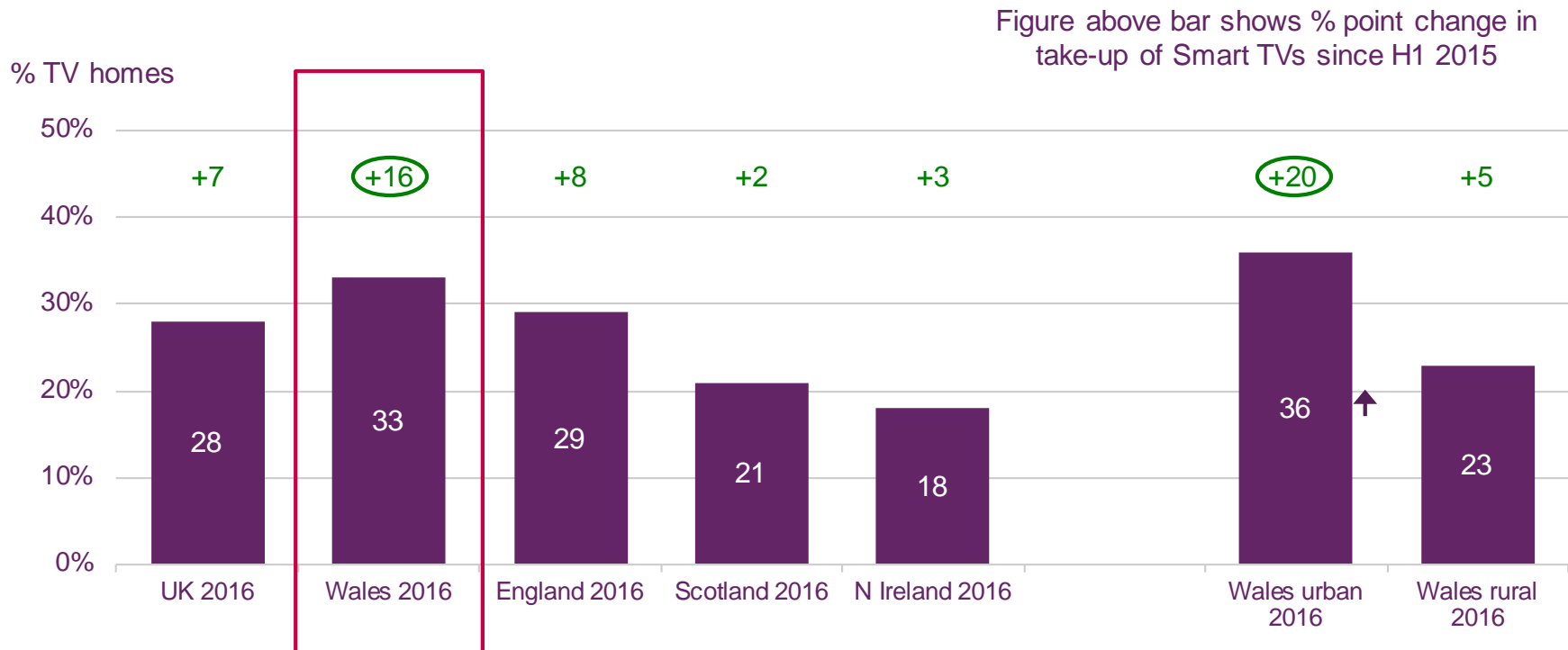
Base: All adults aged 16+ with a TV in the household (n = 3606 UK, 471 Wales, 2148 England, 491 Scotland, 496 Northern Ireland, 231 Wales urban, 240 Wales rural)

Significance testing: Arrows indicate any significant differences between Wales and UK in 2016 and between Wales urban and rural in 2016

QH53: Is the main TV in your household an HDTV set or HD ready?/ QH54: Although you have an HDTV ready set, to actually watch TV channels and programmes that are broadcast in high definition, you need an HD set top box or a TV with built-in HDTV receiver. For the main TV set, does your household have an HD TV service?

Figure 2.4

Smart TV take-up in Wales



Source: Ofcom Technology Tracker, Half 1 2016

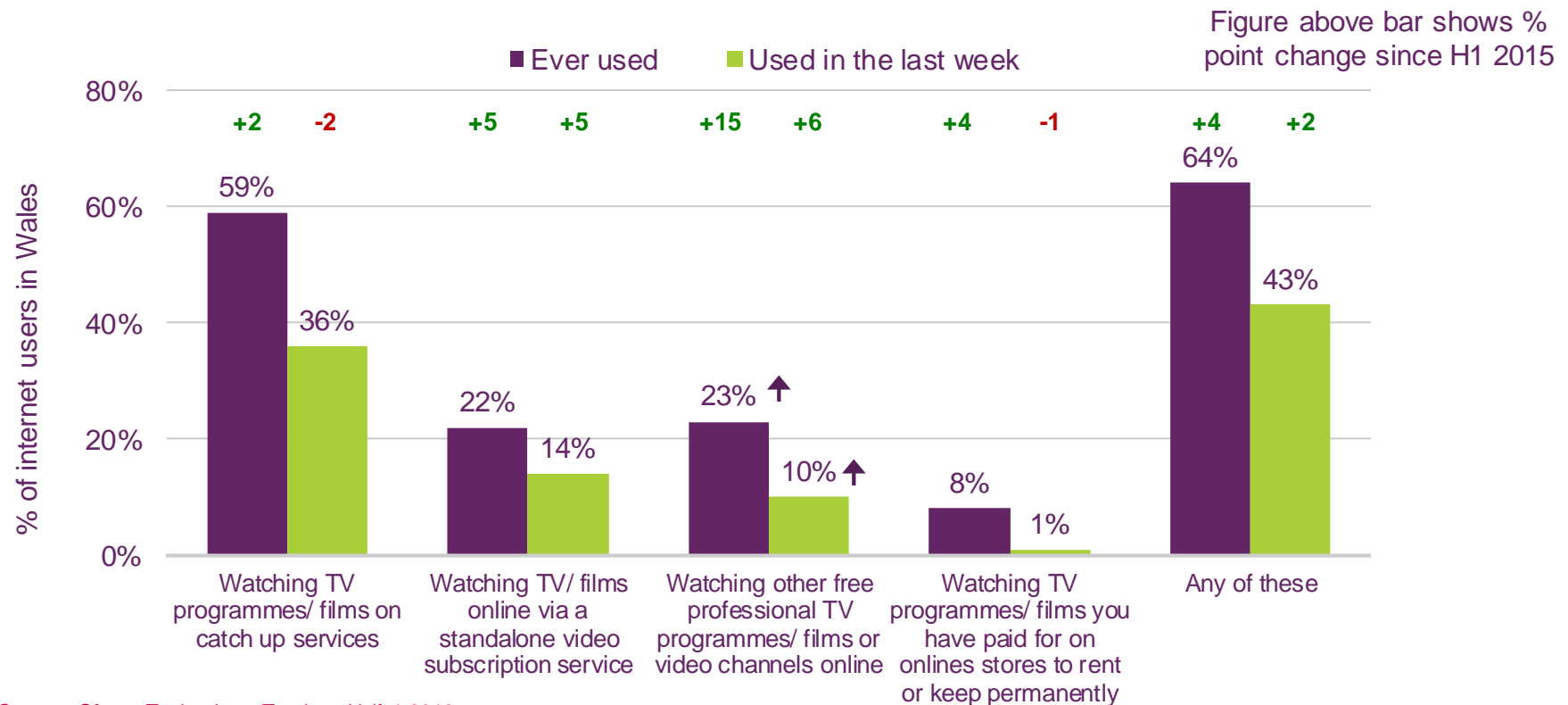
Base: All adults aged 16+ with a TV in household (n = 3606 UK, 471 Wales, 2148 England, 491 Scotland, 496 Northern Ireland, 231 Wales urban, 240 Wales rural)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2016 and between Wales urban and rural in 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Wales, urban and rural.

QH62: 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 and on-demand on any device



Source: Ofcom Technology Tracker, Half 1 2016

Base: All Wales adults aged 16+ who use the internet at home or elsewhere (n = 401)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales 2015 and 2016.

QH46: 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? / QH47: 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: 2015

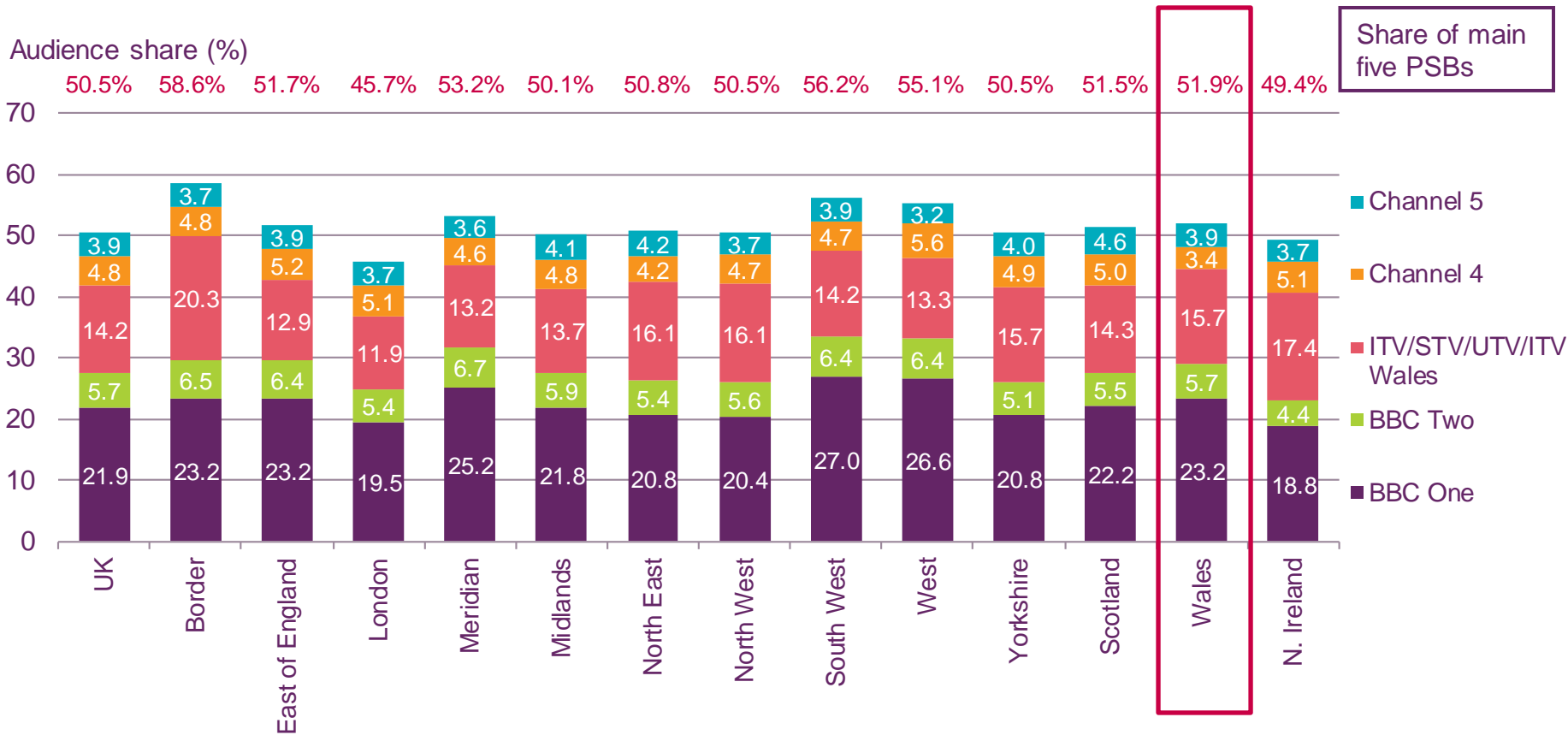


Source: BARB, Individuals (4+). Please see definitions for list of PSB channels

*Note: This figure reflects the average across the English regions with the highest in Border at 243 minutes (4 hours 03 minutes) and lowest in London 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: 2015



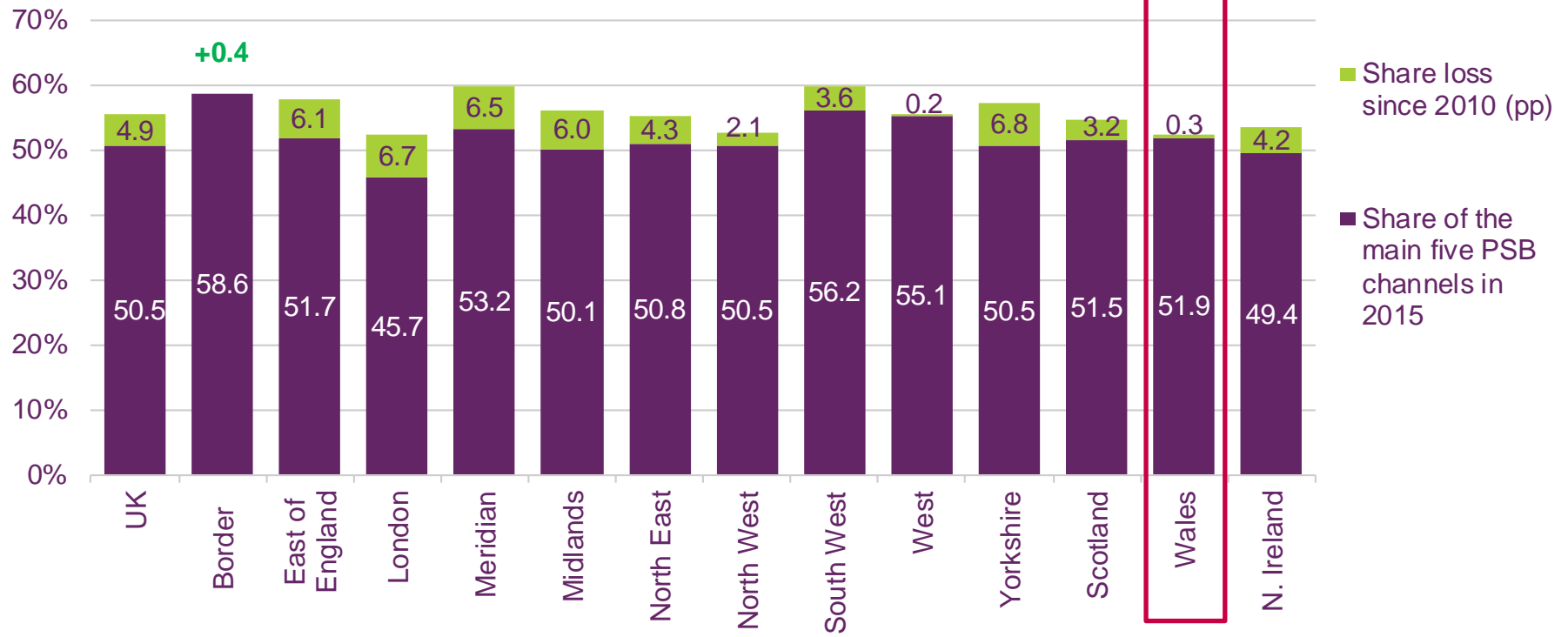
Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

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

Change in combined share of the main five PSB channels, all homes:
2010 and 2015

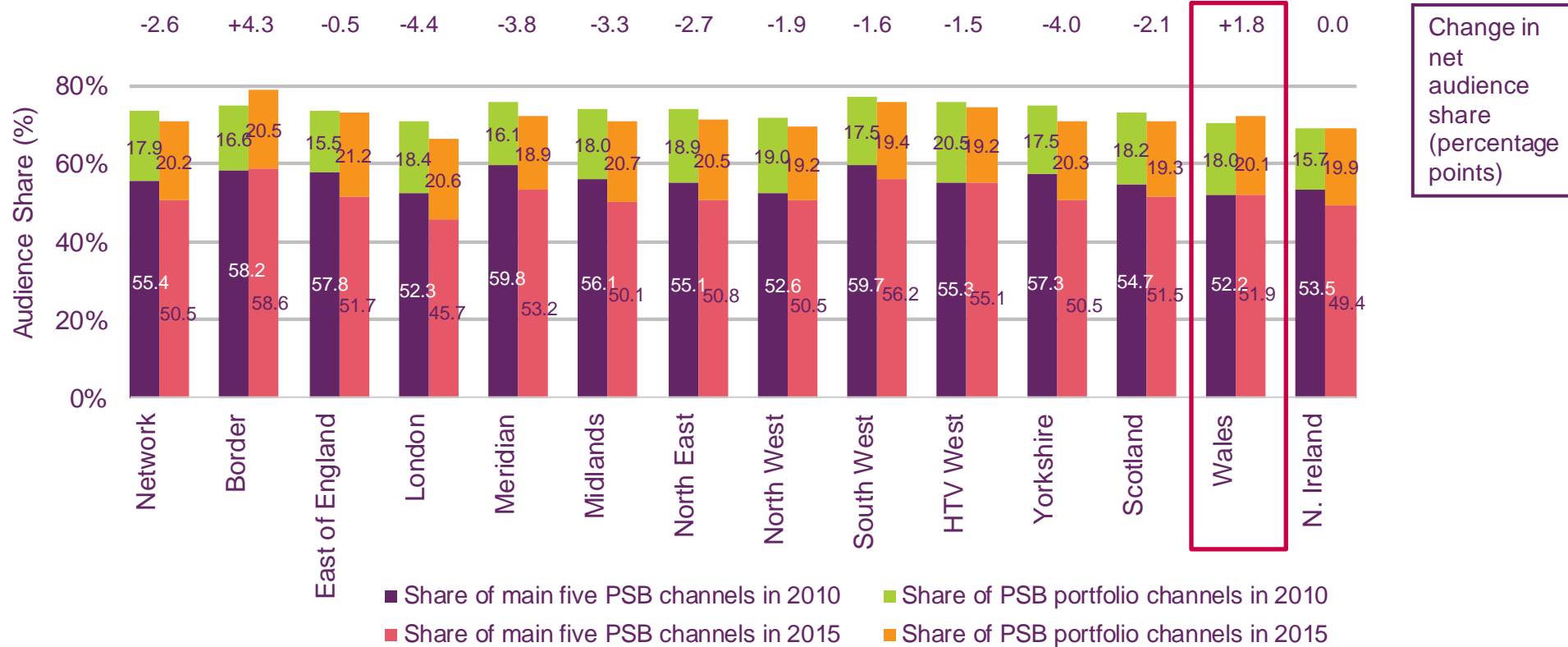
Audience share (%)



Source: BARB, Individuals (4+).

Figure 2.9

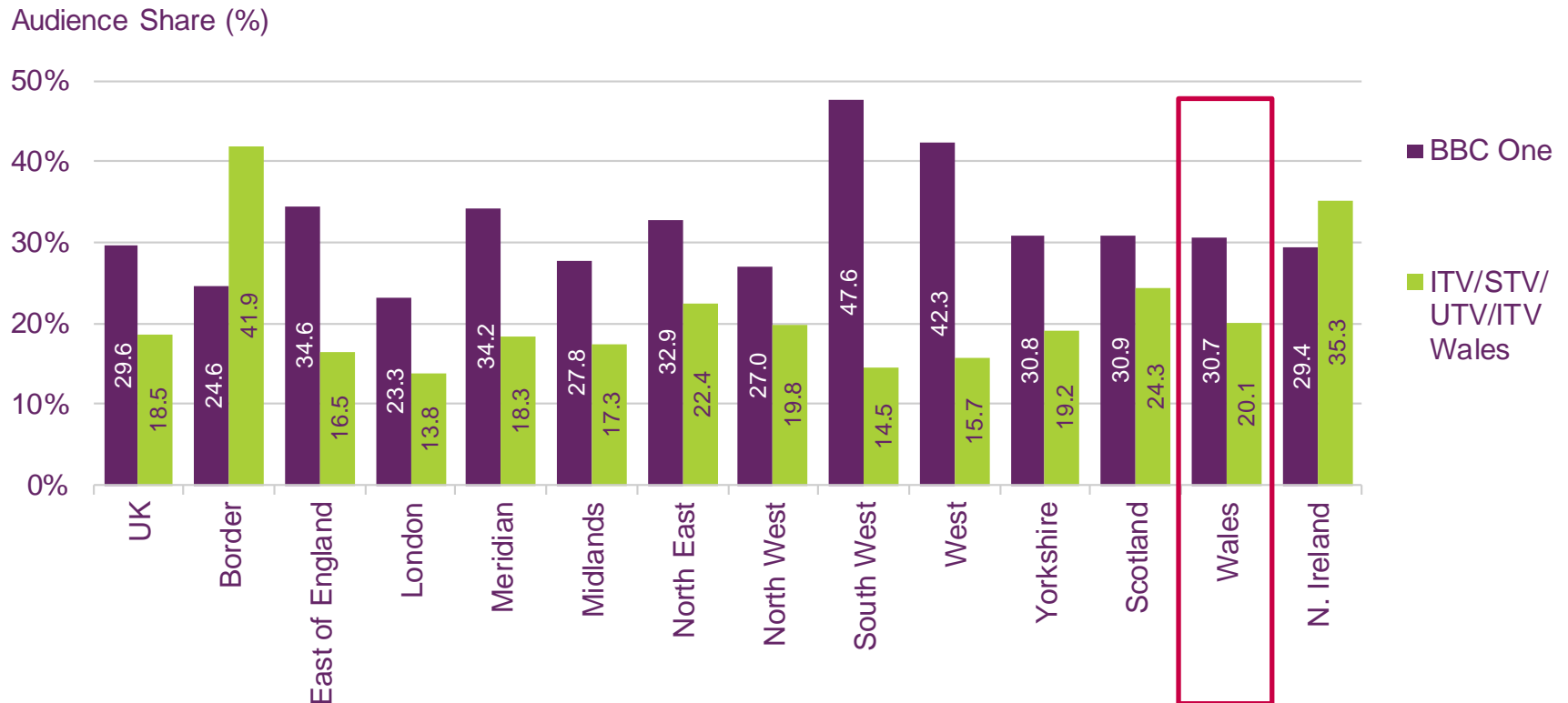
Net change in the audience share of the main five PSB channels and their portfolio channels, all homes: 2010 and 2015



Source: BARB, Individuals 4+.

Figure 2.10

BBC One and ITV/ STV/ UTV/ ITV Wales early evening news bulletin shares, all homes: 2015



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 parts. 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



Source: Ofcom Media Tracker 2015.

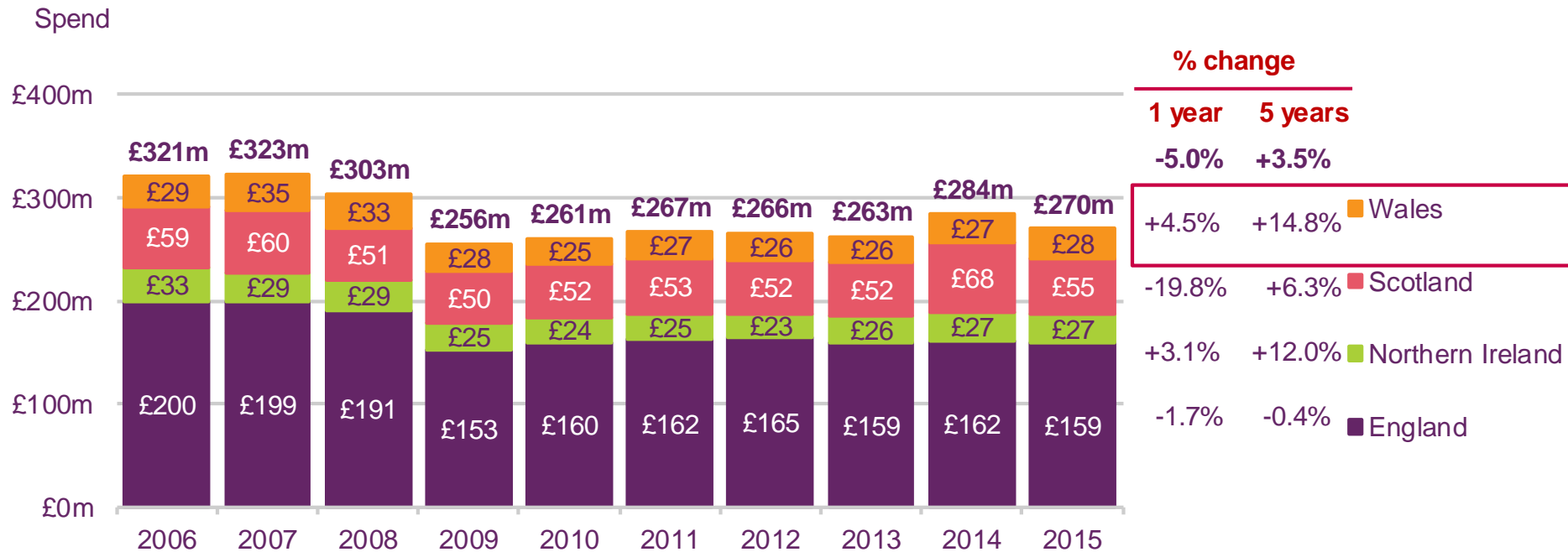
Base: All (2,107); England (1,607); Scotland (180); Wales (164); Northern Ireland (156).

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?

Significance testing – arrows show any difference in the main source of news between any nation and all adults in 2015

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. Spend on content broadcast in the Scottish part of the ITV Border region is included within England from 2006-2013, but in Scotland thereafter. These figures do not include spend on network content. For more information on S4C, please see Section 1.5.

Figure 2.13

Change in total spend on nations and regions output, by genre and nation: 2010-2015

	UK		England		N. Ireland		Scotland		Wales	
	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)
Current affairs	-10%	-1%	-1%	-28%	11%	68%	-19%	34%	-7%	11%
News	0%	2%	-1%	-1%	4%	17%	1%	16%	-3%	0%
Non-news/non-current affairs	-14%	1%	0%	-25%	1%	-4%	-28%	-4%	14%	28%
Total spend in 2015	£271m		£159m		£27m		£56m		£29m	

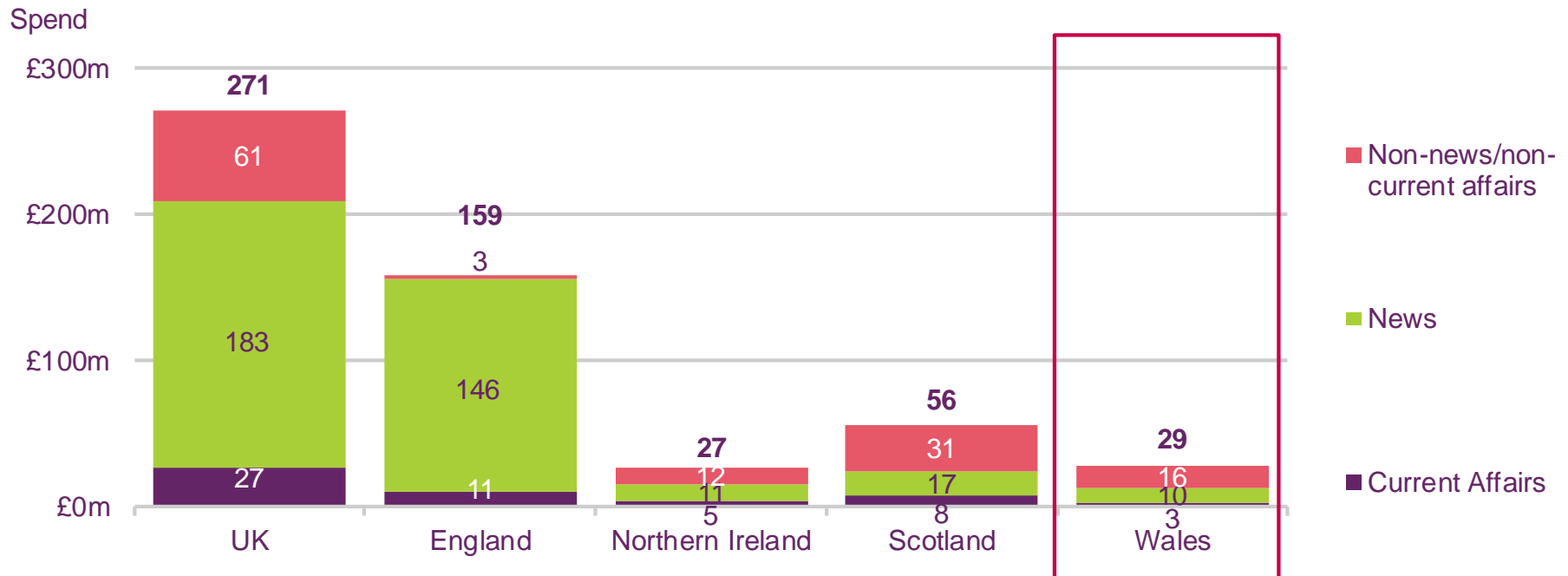
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in spend	-5%	1%	-2%	-4%	3%	12%	-20%	6%	5%	15%

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 divided between England and Scotland in 2014-2015 and attributed to England only before 2014.

Figure 2.14

Total spend by the BBC/ ITV/ STV/ UTV on non-network nations/regions output for the main PSB channels: 2015

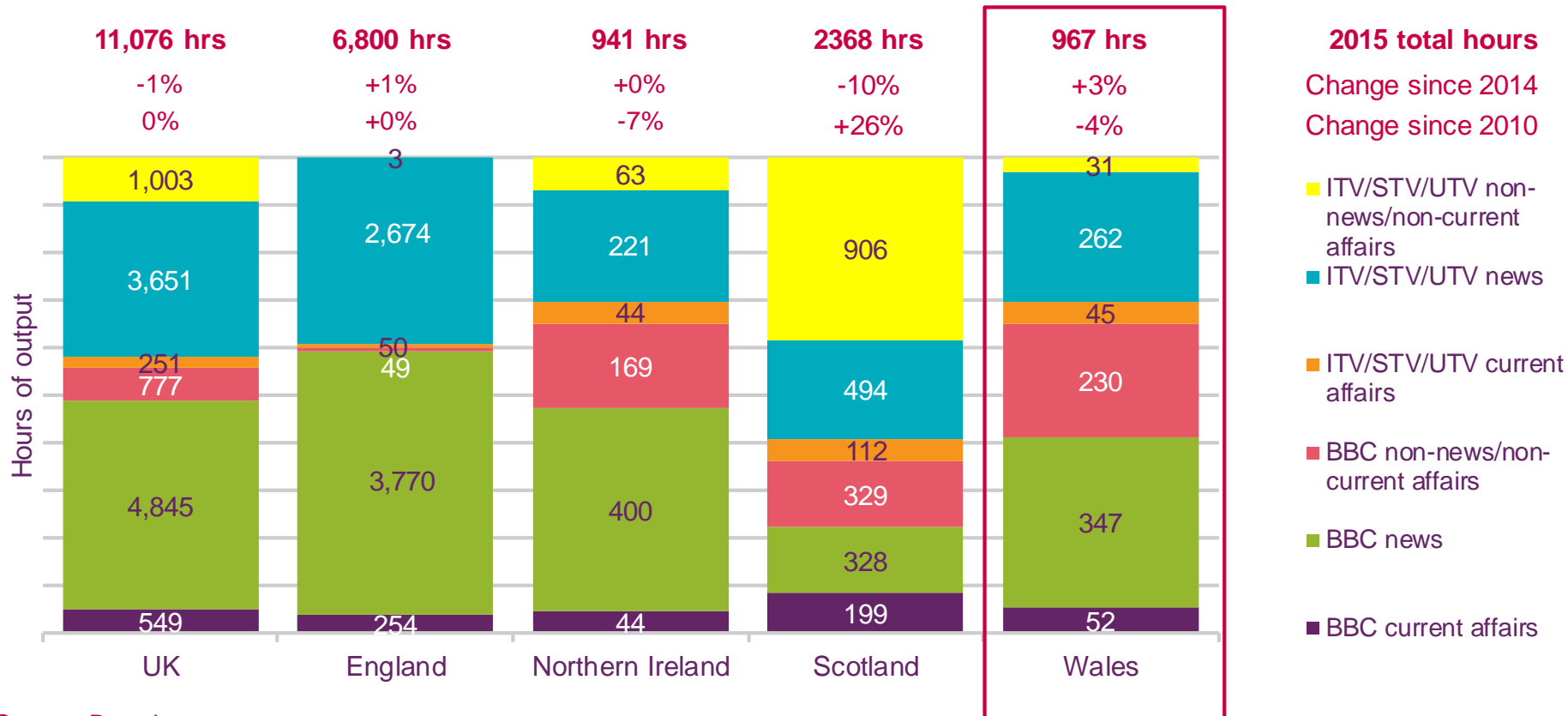


Source: Broadcasters.

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. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015.

Figure 2.15

First-run originated hours of nations/regions output, by genre and broadcaster: 2015



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. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015

Figure 2.16

Cost per hour for total nations' and regions' output, by nation: 2010-2015

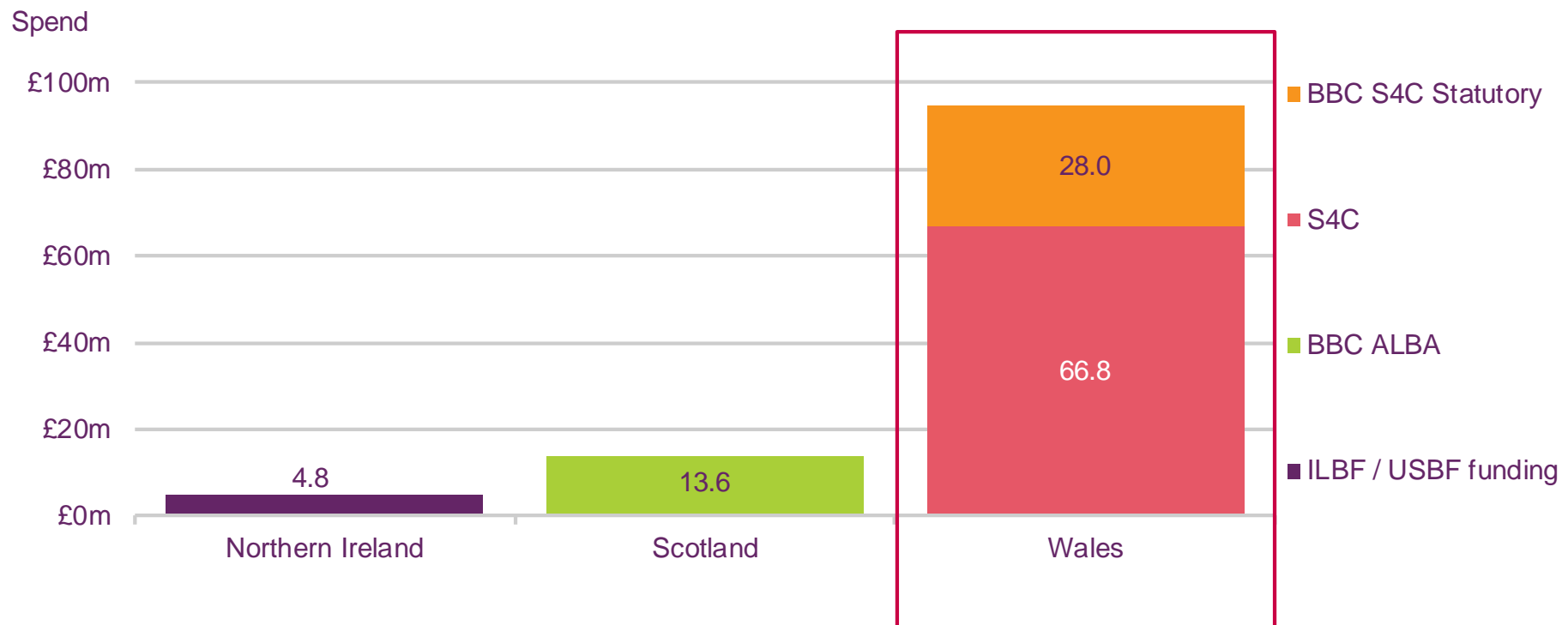


Source: Broadcasters. All figures are nominal.

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. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015

Figure 2.17

Other spend on other programming in the devolved nations: 2015



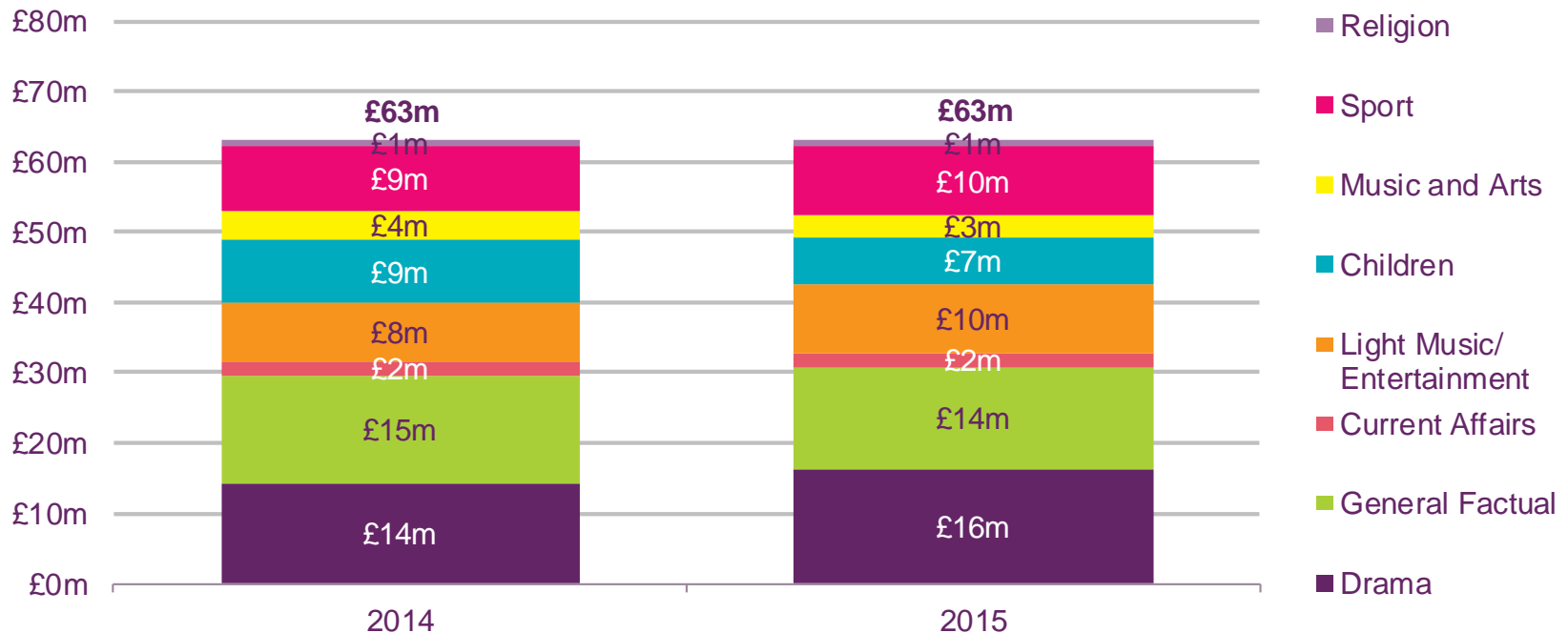
Source: Broadcasters.

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 2.18

Spend by S4C on first-run Welsh language programming 2015

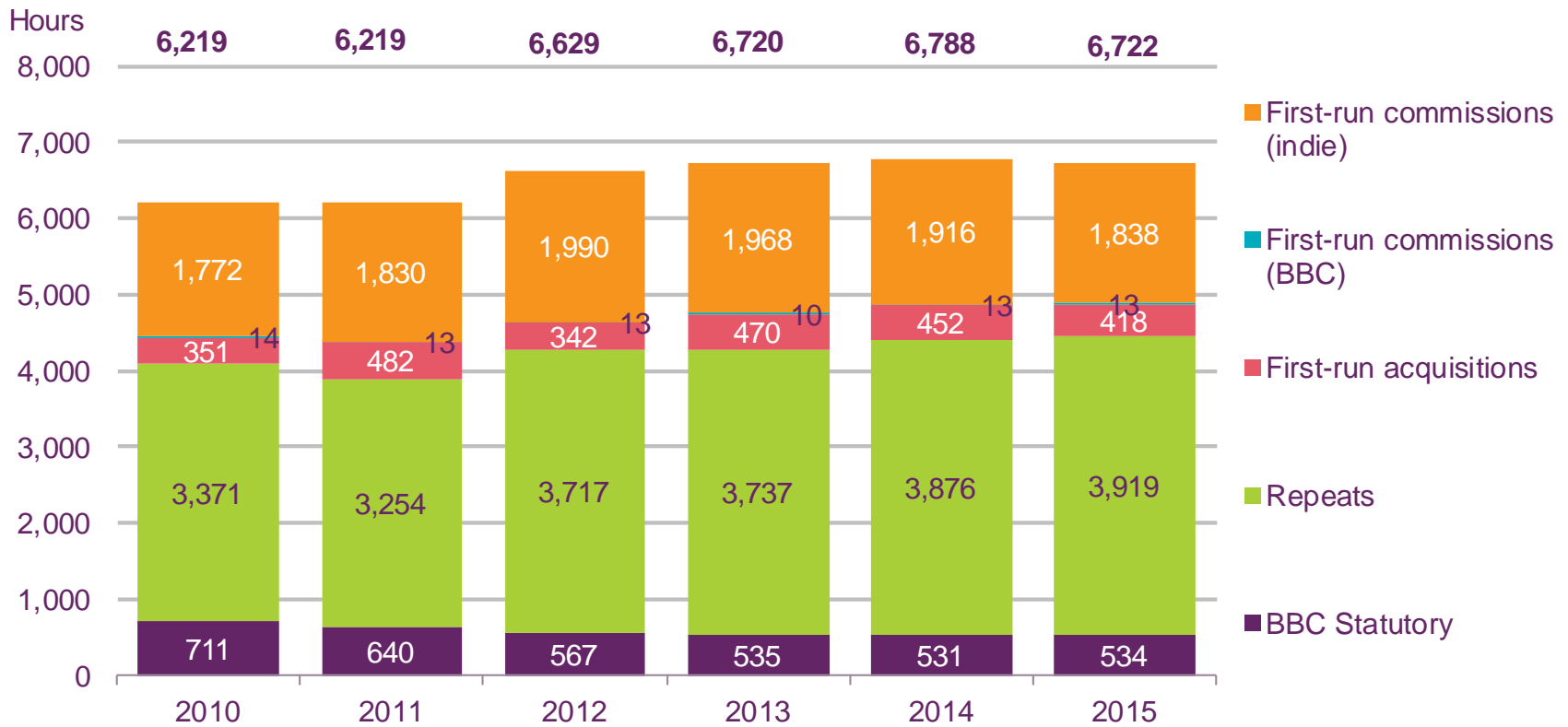
Spend on Welsh language programming



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

Figure 2.19

Type of Welsh-language output on S4C, by hours

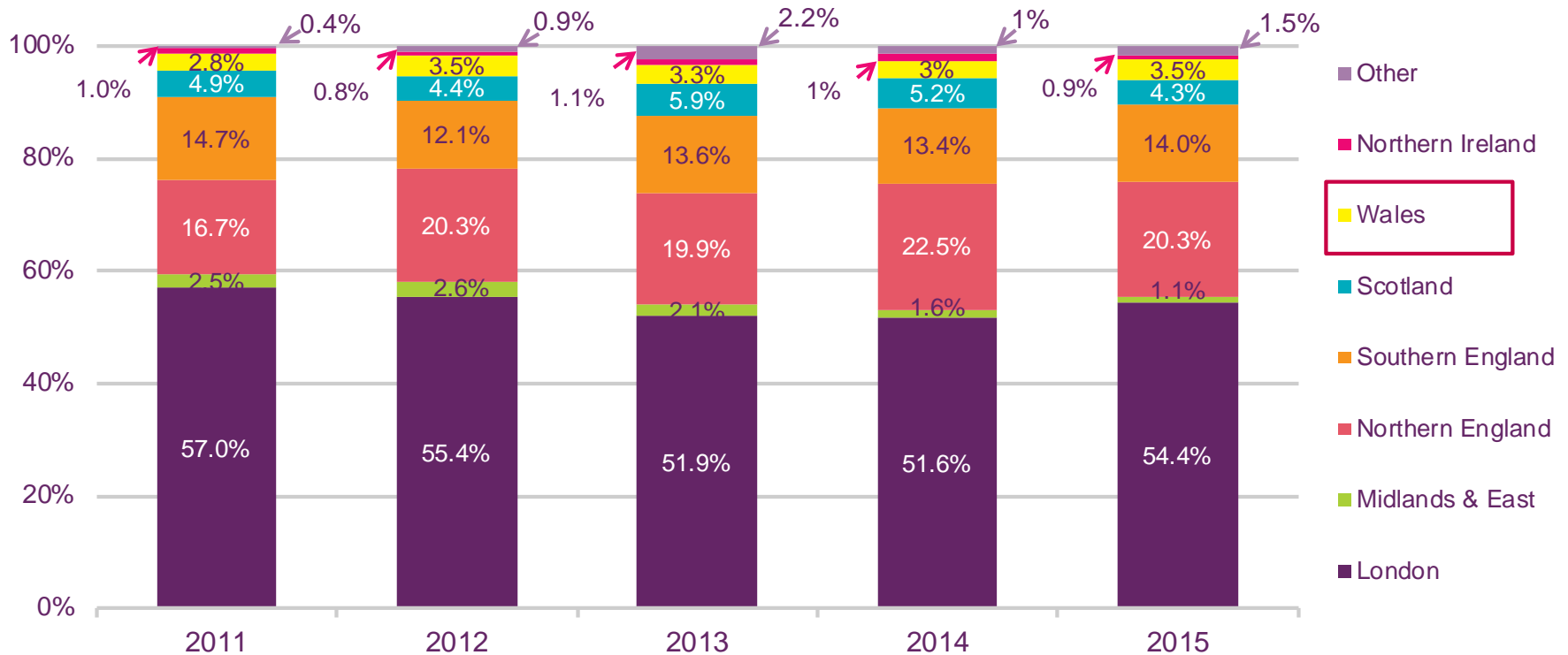


Source: S4C.

Figure 2.20

Expenditure on originated network productions: 2011-2015

Percentage of production by value



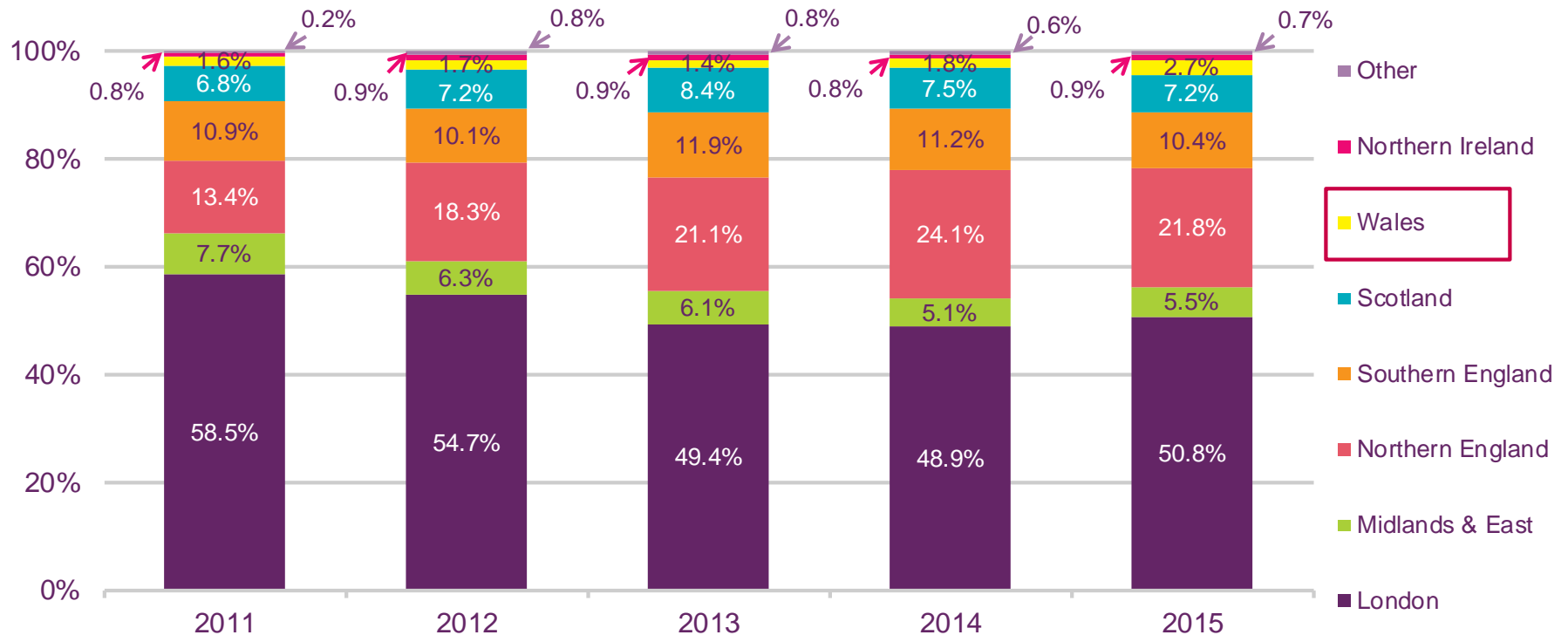
Source: Ofcom/broadcasters

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 off-screen 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/ on Ofcom website for further details.

Figure 2.21

Volume of originated network productions: 2011-2015

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 off-screen 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/ on Ofcom website for further details.