

Factsheet 1 - TV output

Ofcom

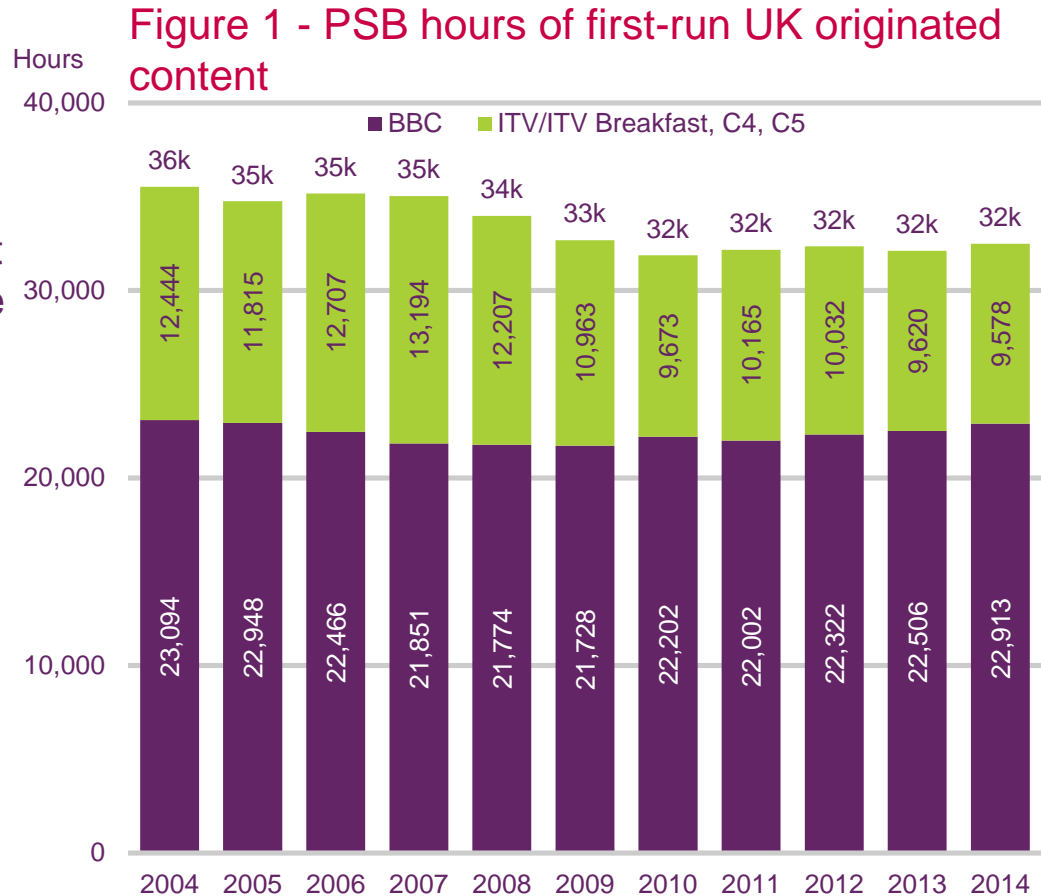
Oxford Media Convention 2 March 2016

This factsheet has been compiled by Ofcom and provides some background to aid discussion at the 2016 Oxford Media Convention. It looks at the output of original UK programming on both the PSB channels and the multichannel sector in recent years. Figures are provided up to and including 2014, as data are collected from broadcasters on an annual basis and 2015 data are as yet not available. All data referred to can be found in Ofcom's PSB Annual Report 2015

Market Context

Key points

- First-run UK originated content consists of programmes commissioned by or for a UK television channel which are then first shown in the UK on that channel. The majority of programme spend by the public service broadcaster (PSB) channels is on such programming.
- Such hours have been fairly stable at around 32,000 per year since 2010 across the PSB channels, which is down from the 36,000 broadcast in 2004 (Fig 1). The decline from 2004 to 2014 can mainly be attributed to the 23% decline in first-run UK hours from the commercial PSB channels. This compares to a 1% decline from the BBC over the same period.



Source: Ofcom's PSB Annual Report 2015. BBC figures include BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, BBC Parliament. The analysis does not include S4C, BBC Alba or BBC HD. Figures exclude nations/regions programming. Output hours are based on slot times.

Market Context

Key points

- Most of the increase in the BBC's first-run output since 2009 can be attributed to BBC One; there was a 23% increase from 2009 to 2014. Channel 5 was the main reason behind the decrease in such output from the commercial PSB channels over the same period (down by 39%) although they did broadcast 8% more year-on-year in 2014.

Figure 2 - PSB hours of first-run UK originated content; by channel

	Hours of first-run originated output							First run hours as a % of all output		
	2009	2013	2014	Change (hours)		Change (%)		2009	2013	2014
				5 yr	1 yr	5 yr	1 yr			
BBC One	5423	6397	6666	1243	269	23%	4%	64%	75%	79%
BBC Two	3660	2800	2963	-697	163	-19%	6%	45%	36%	38%
BBC Portfolio	12645	13309	13284	639	-25	5%	0%	38%	41%	40%
BBC Total	21728	22506	22913	1185	407	5%	2%	44%	46%	47%
ITV/ITV Breakfast	5228	5108	4911	-317	-197	-6%	-4%	62%	60%	58%
Channel 4	2939	2941	2965	26	24	1%	1%	34%	34%	34%
Channel 5	2796	1571	1702	-1094	131	-39%	8%	32%	18%	19%
Commercial Total	10963	9620	9578	-1385	-42	-13%	0%	42%	37%	37%
Grand Total	32691	32126	32491	-200	322	-1%	1%	43%	43%	43%

Source: Ofcom's PSB Annual Report 2015. Note: Ofcom/broadcasters. BBC portfolio includes BBC Three, BBC Four, CBBC, CBeebies, BBC News, BBC Parliament. The analysis does not include S4C, BBC Alba or BBC HD. Figures exclude nations/regions programming. Output hours are based on slot times.

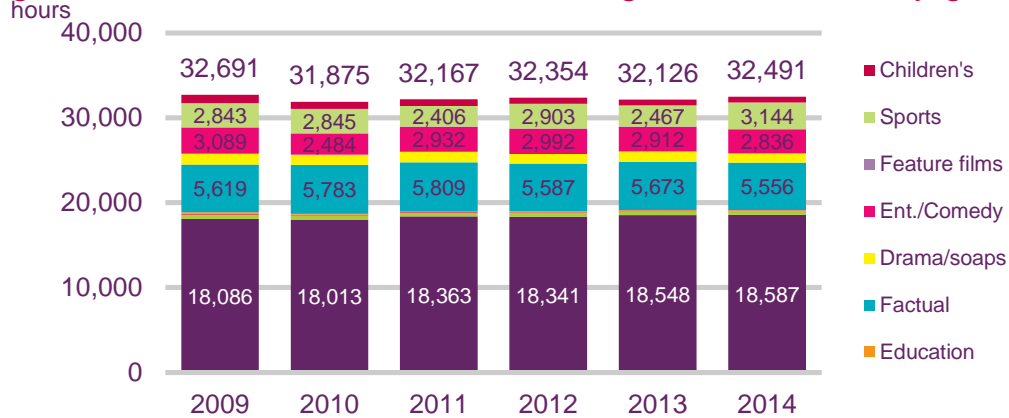
Market Context



Key points

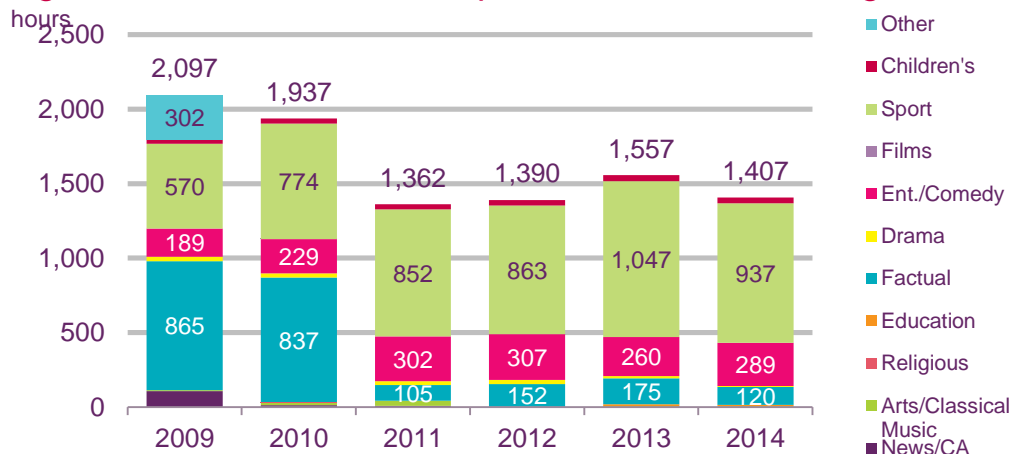
- Figure 3 shows the genre breakdown of first-run UK originations broadcast by the PSB channels from 2009 to 2014. News and current affairs output makes up over half of the original hours, in large part down to the single-genre BBC News and BBC Parliament channels.
- After falling from 2010 to 2011 due to the end of live *Big Brother* coverage on E4, original UK content on the PSB portfolio channels has been fairly steady, as shown in Figure 4. The 10% decrease in first-run hours from 2013 to 2014 was mainly driven by the 110 hour reduction in sports output across these channels.

Figure 3 - PSB hours of first-run UK originated content; by genre



Source: Ofcom's PSB Annual Report 2015. Figures include PSB services: BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, BBC Parliament, ITV, ITV Breakfast, Channel 4 and Channel 5. The analysis does not include S4C, BBC Alba or BBC HD. Figures exclude nations/regions programming. Output hours are based on slot times.

Figure 4 – Commercial PSB portfolio first-run UK originated hours



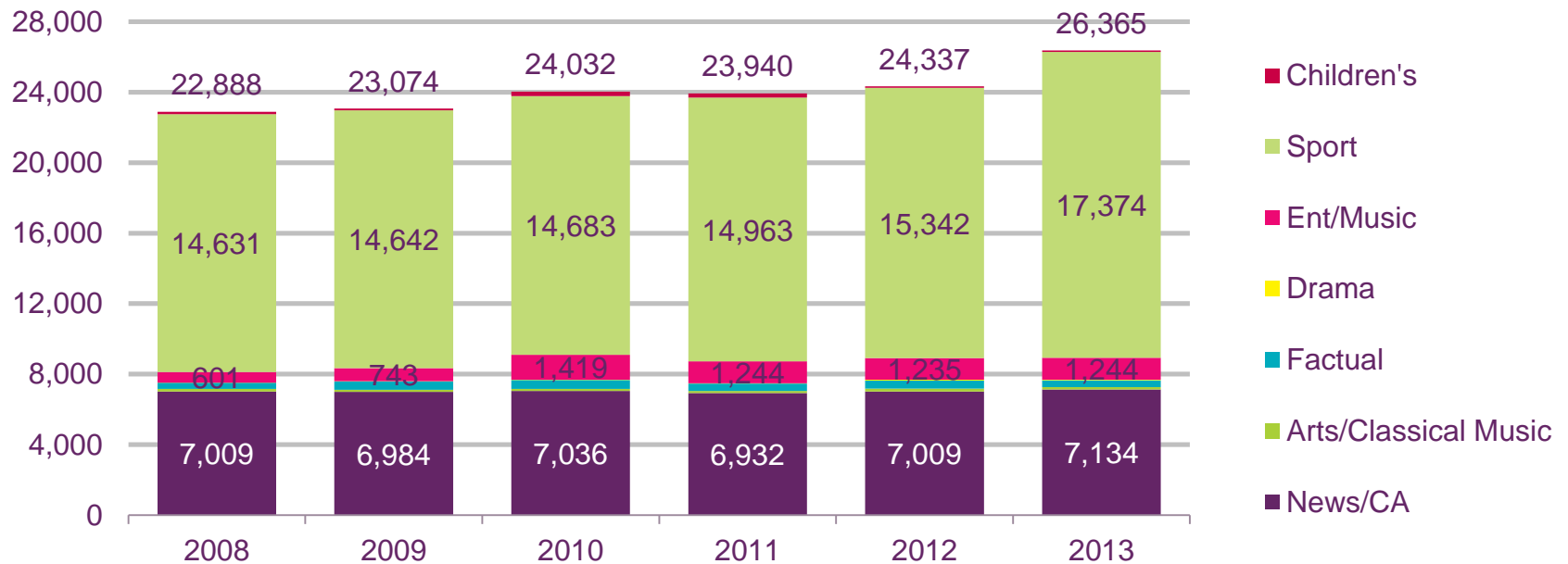
Source: Ofcom's PSB Annual Report 2015. Note: Commercial PSB portfolio channels are CITV, ITV2, ITV3, ITV4, 4seven, E4, Flim4, More4, 5USA and 5*. Output hours are based on running time.

Market Context

Key points

- Unsurprisingly, news, current affairs and sport programming dominate the original UK output among the multichannel sector. However, they more than doubled their hours of original entertainment and music programming between 2008 and 2013.

Figure 5 – Multichannel first-run UK originated hours, by genre



Source: Ofcom's PSB Annual Report 2014 . A 2014 update is not available. Note: Multichannel data consists of returns from Sky, Viacom, UKTV, BT, Discovery, AETN, Turner, Disney, CSC and Baby TV. Output hours are based on running time.