

**Public Service Broadcasting
in the UK**

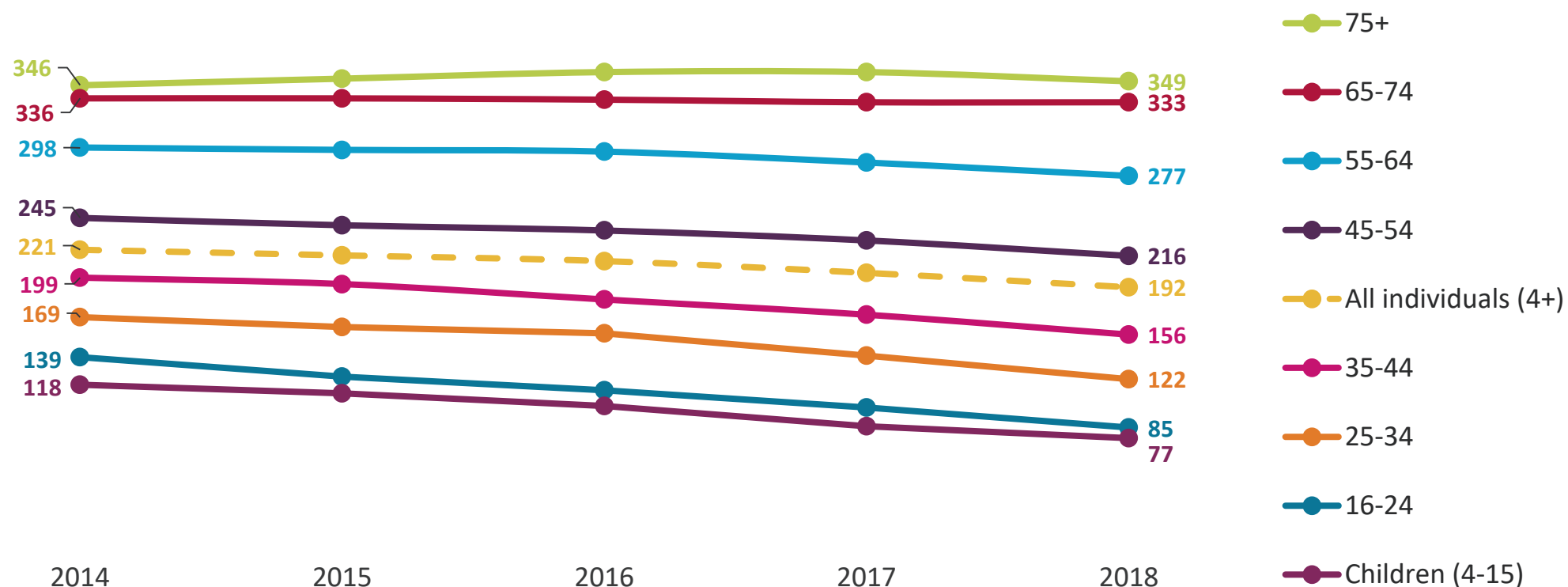


Small Screen: Big Debate

How has the TV landscape changed since 2014?

Time spent watching broadcast TV is still large, but falling and centred around older people

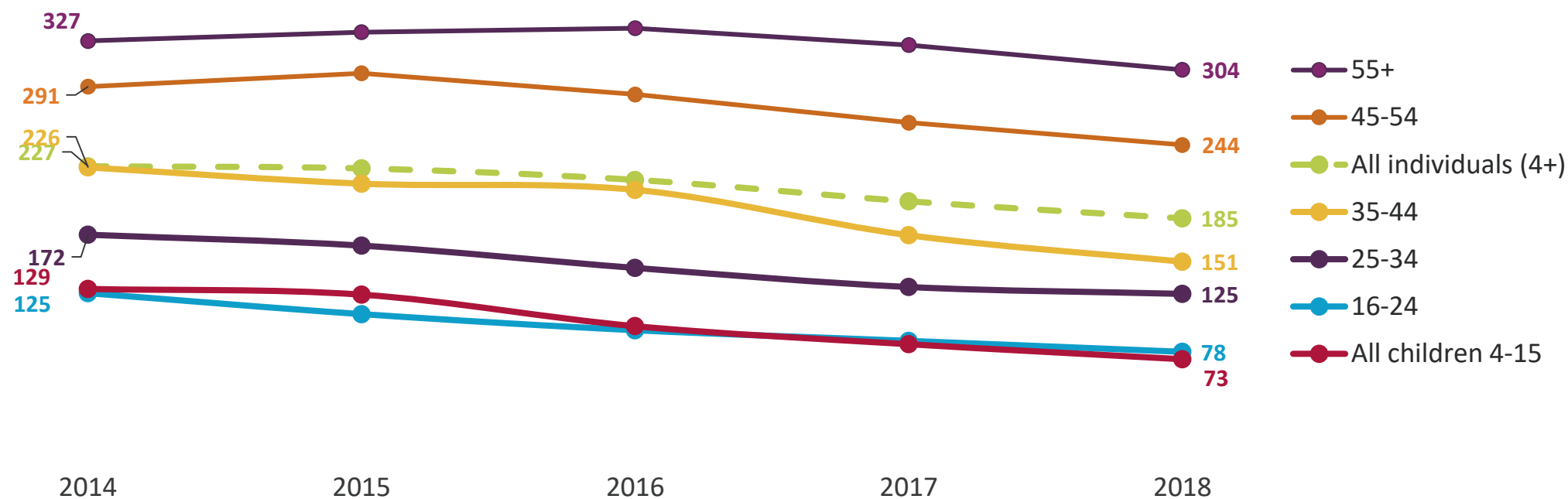
Average minutes of viewing per day across the UK



Source: BARB. All individuals (4+), network.

However in **Northern Ireland**, the downward trend is evident across all age groups

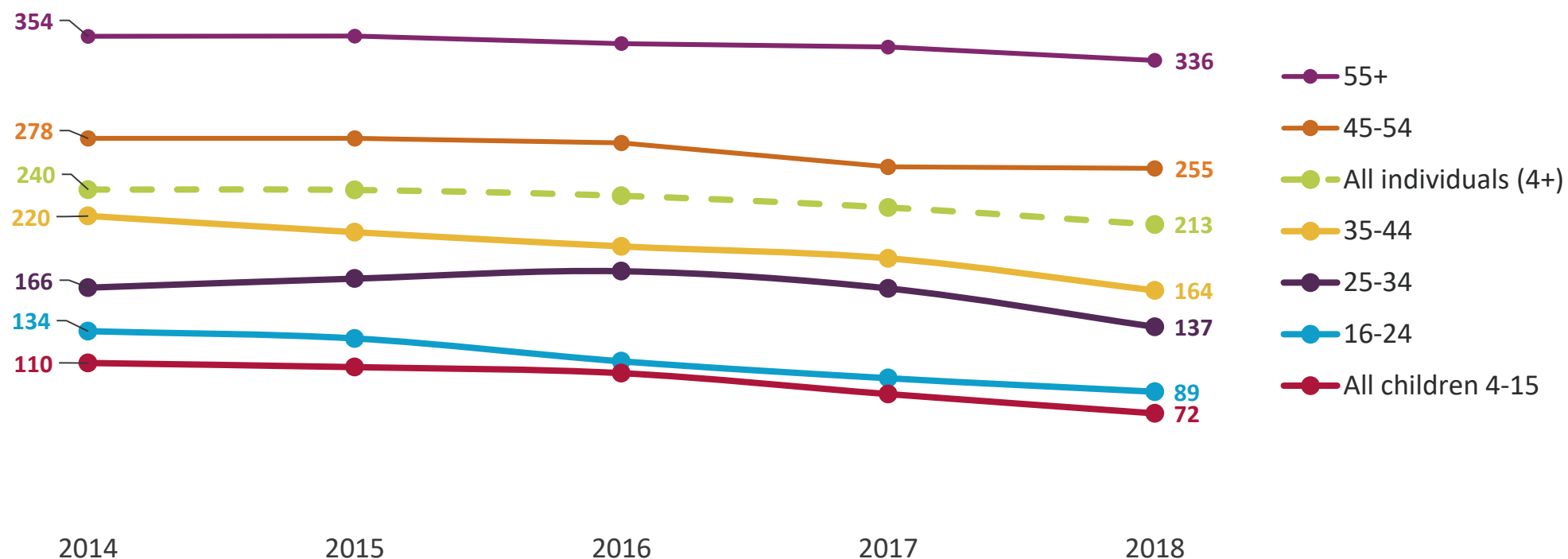
Average minutes of viewing per day (Northern Ireland)



Source: BARB. BBC areas all individuals (4+).

And in **Scotland**, this trend is becoming more pronounced

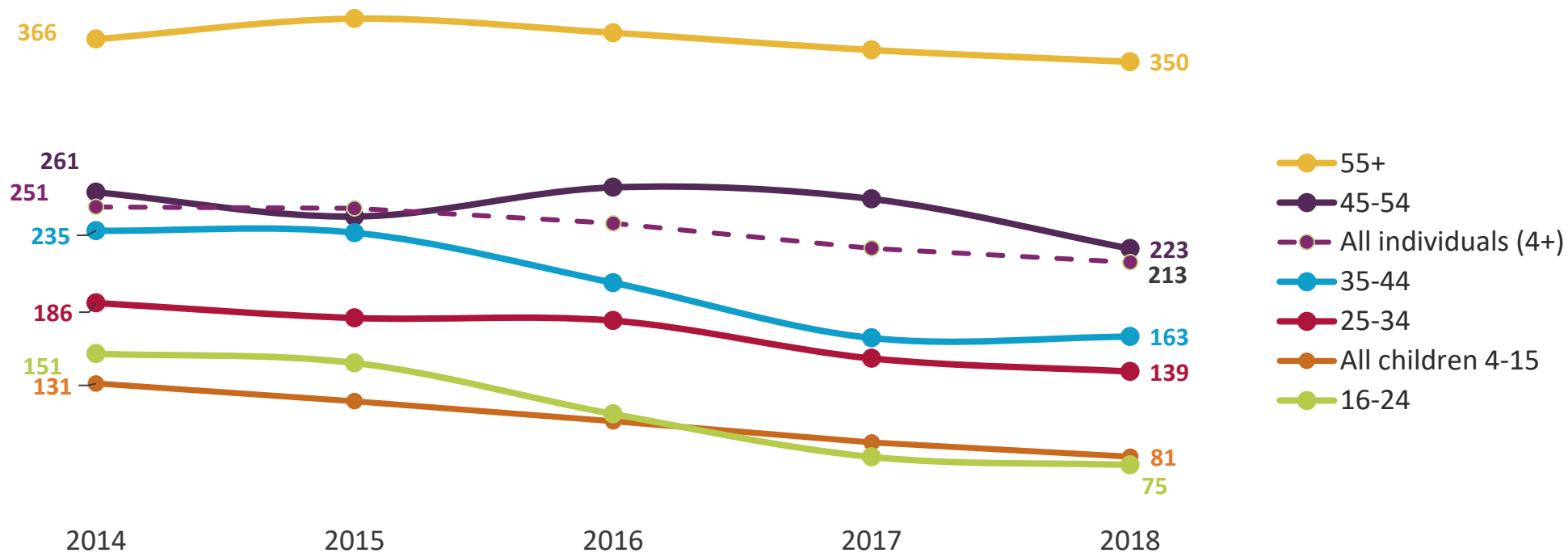
Average minutes of viewing per day (Scotland)



Source: BARB. BBC areas all individuals (4+).

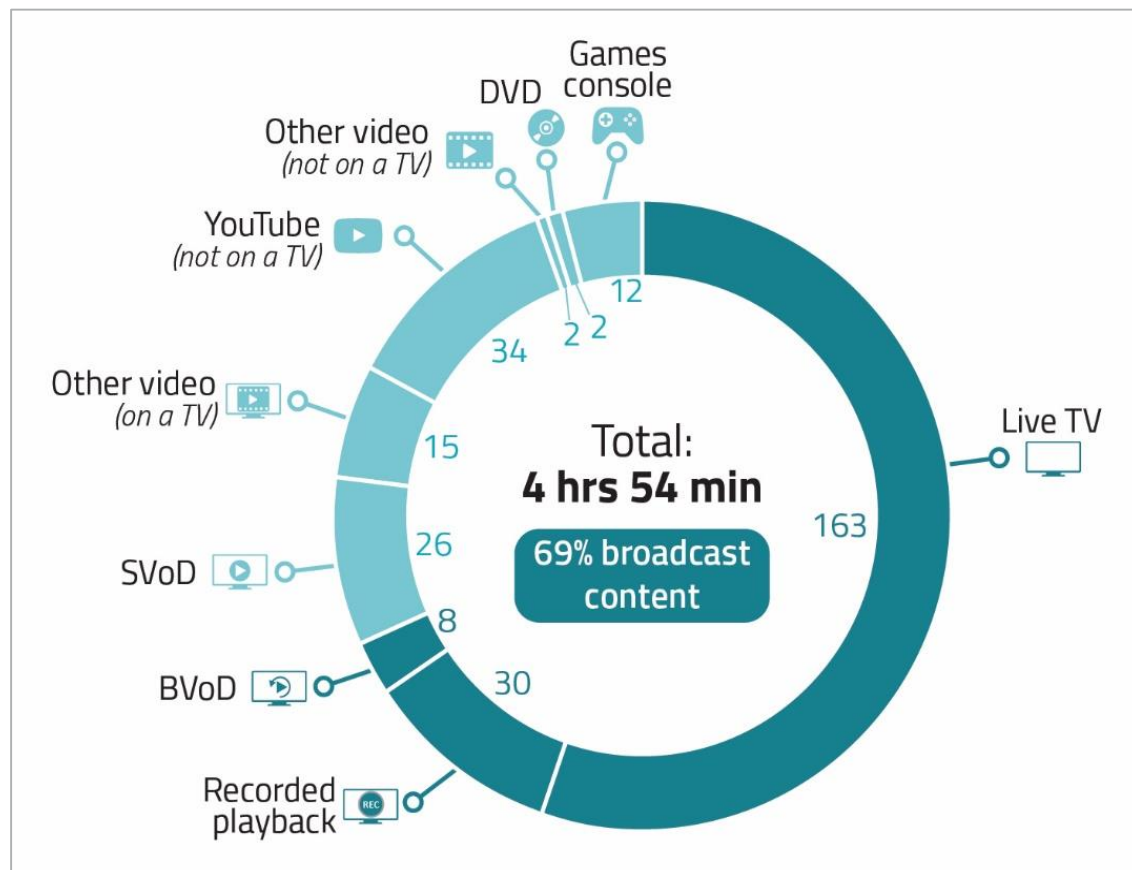
This downward trend is evident in **Wales** also

Average daily minutes spent viewing (Wales)

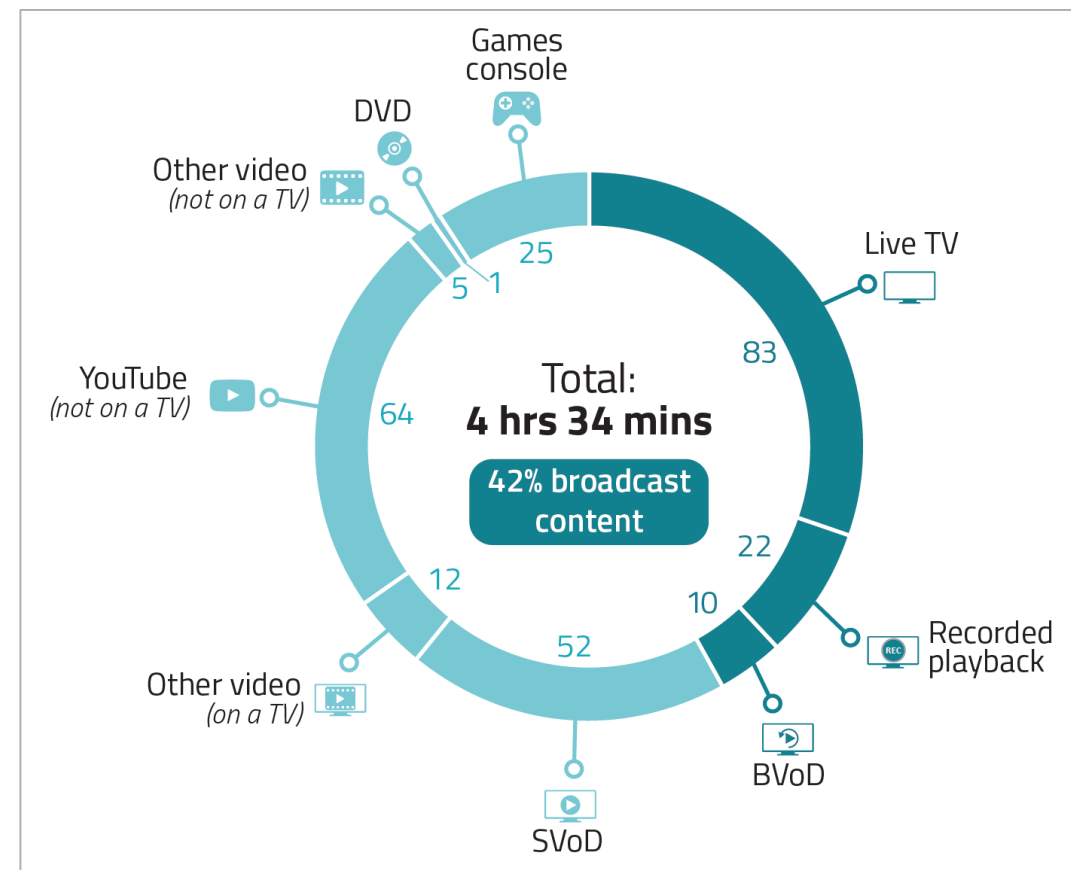


Source: BARB. BBC areas all individuals (4+).

However, despite the decline in broadcast TV, watching video as a whole is not shrinking

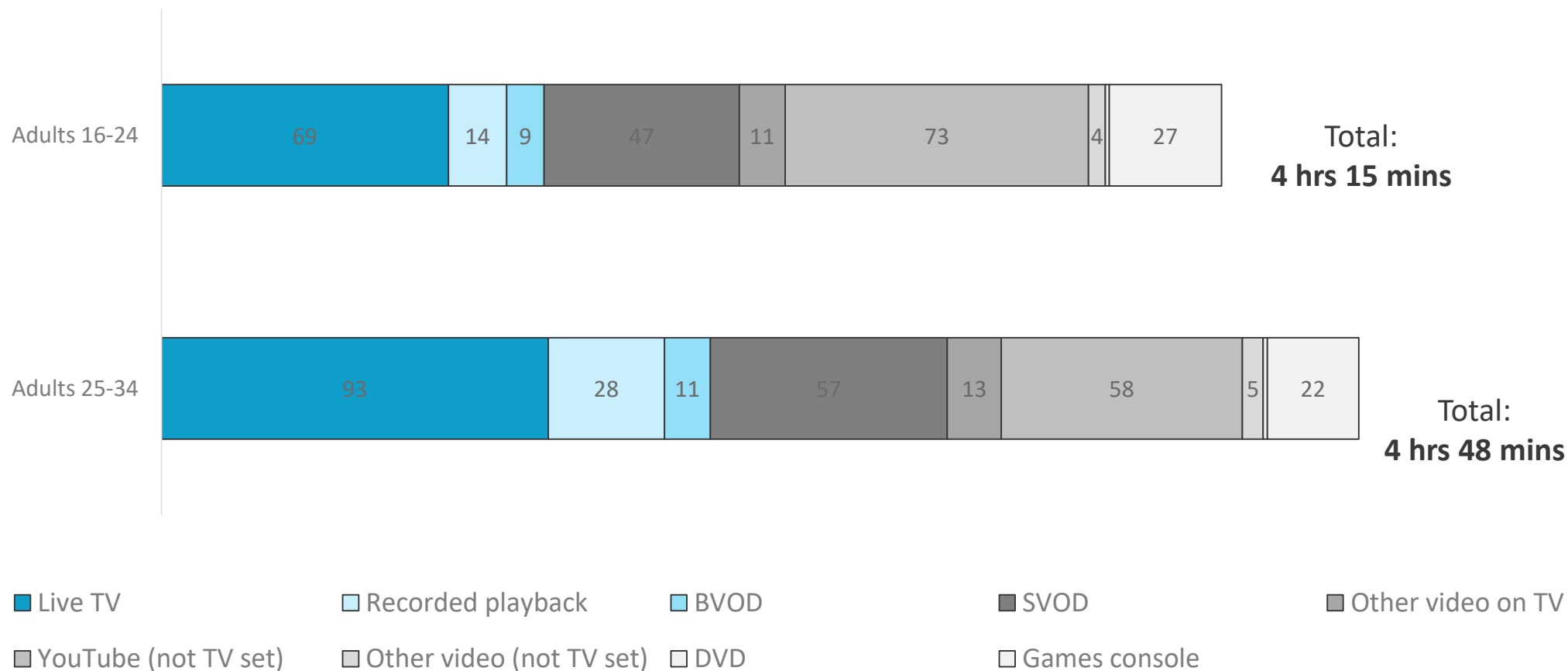


Young adults watch a similar amount of video, but broadcast TV is less than half of viewing



Source: Ofcom total AV modelling using BARB, TouchPoints and Comscore data

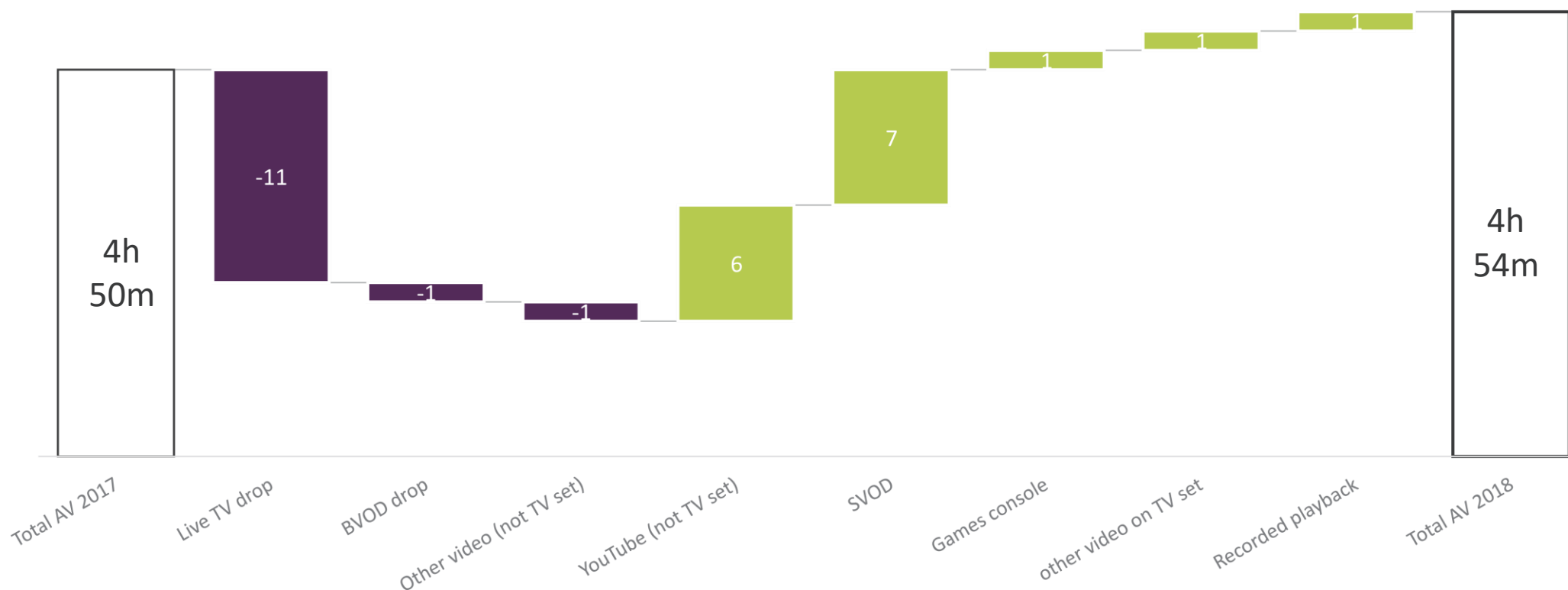
But there are big differences between the 16-24s and the 25-34s



Source: Ofcom total AV modelling using BARB, TouchPoints and Comscore data

Over 2018, YouTube and online subscription video were the key beneficiaries of falling broadcast viewing

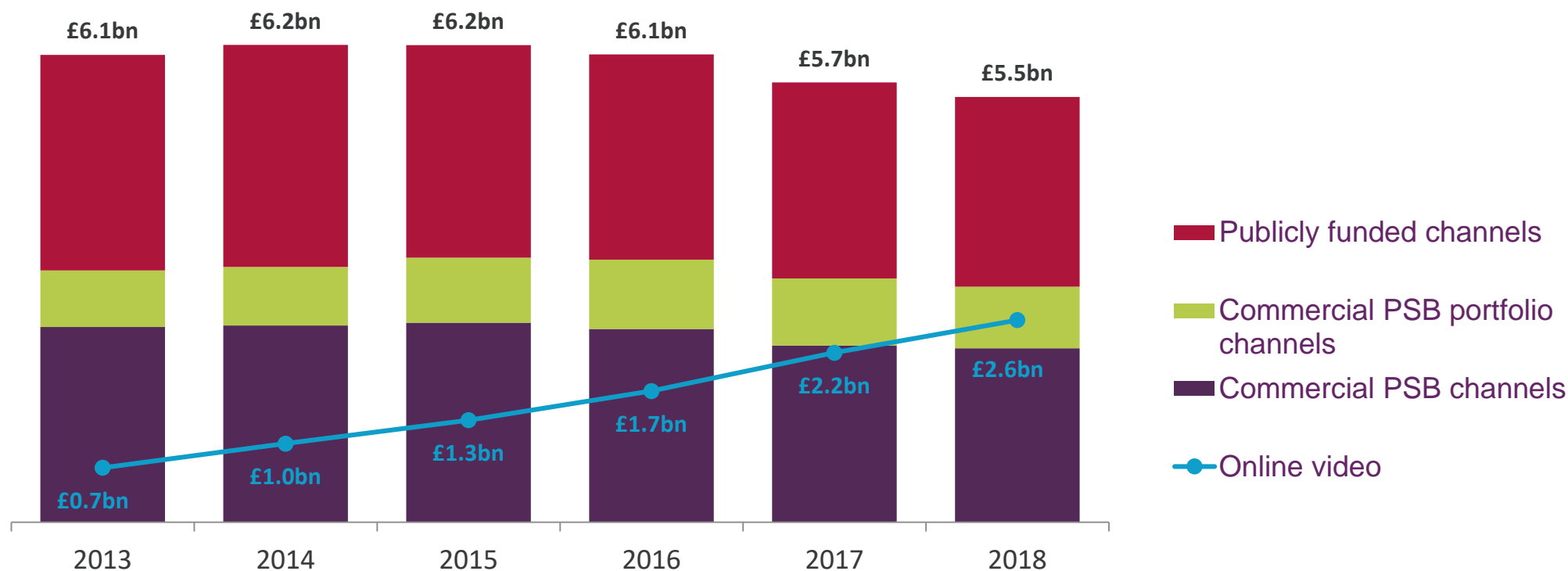
Change in average minutes per day 2017-2018
– all individuals, all devices



Source: Ofcom total AV modelling using BARB, TouchPoints and Comscore data

Online growth is also presenting a threat to PSB revenue

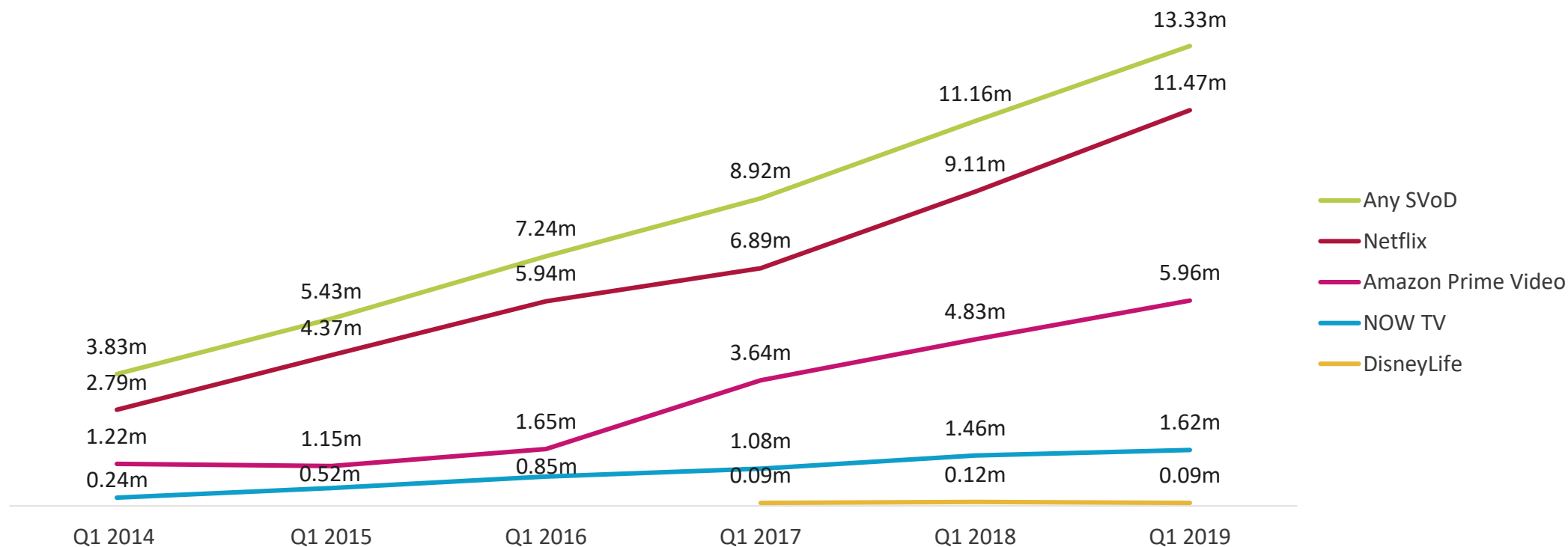
Broadcast TV revenue (£bn)



Source: Ofcom/broadcasters, Ampere Analysis

This year began with almost half of households having an SVoD service

Number of households that subscribe to SVoD

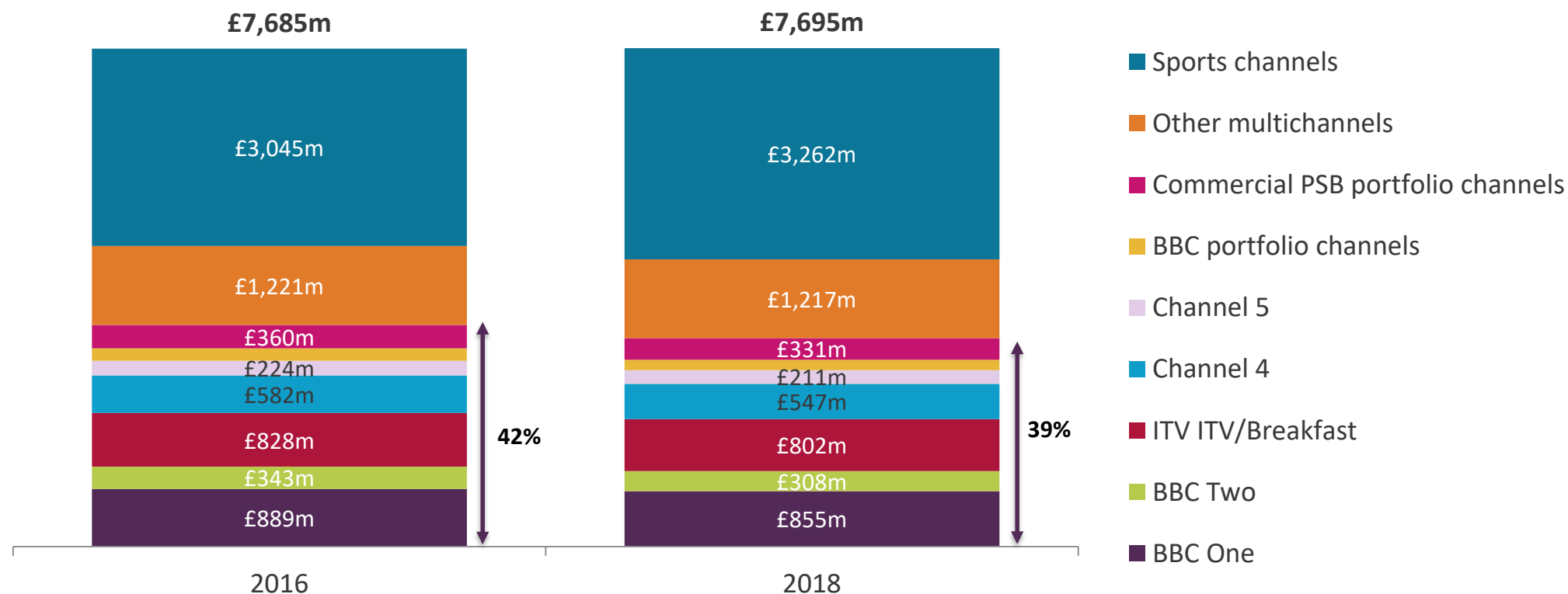


Source: BARB Establishment Survey Q1 2014-2019.

TV spend and production trends

PSBs continue to be significant contributors to broadcast content spend for UK audiences

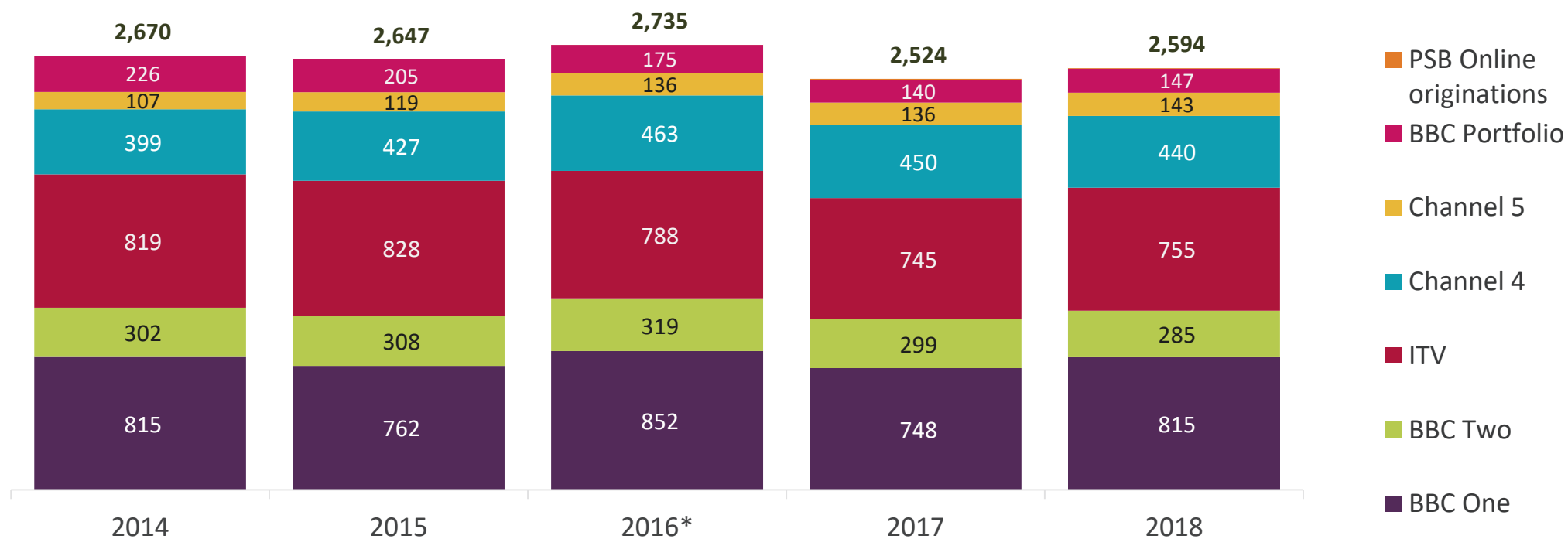
Total TV content spend (including acquired content) [£m]



Source: Ofcom/broadcasters

However, total first-run network spend by PSBs is showing signs of decline

PSB spend on first-run UK originations (£m)

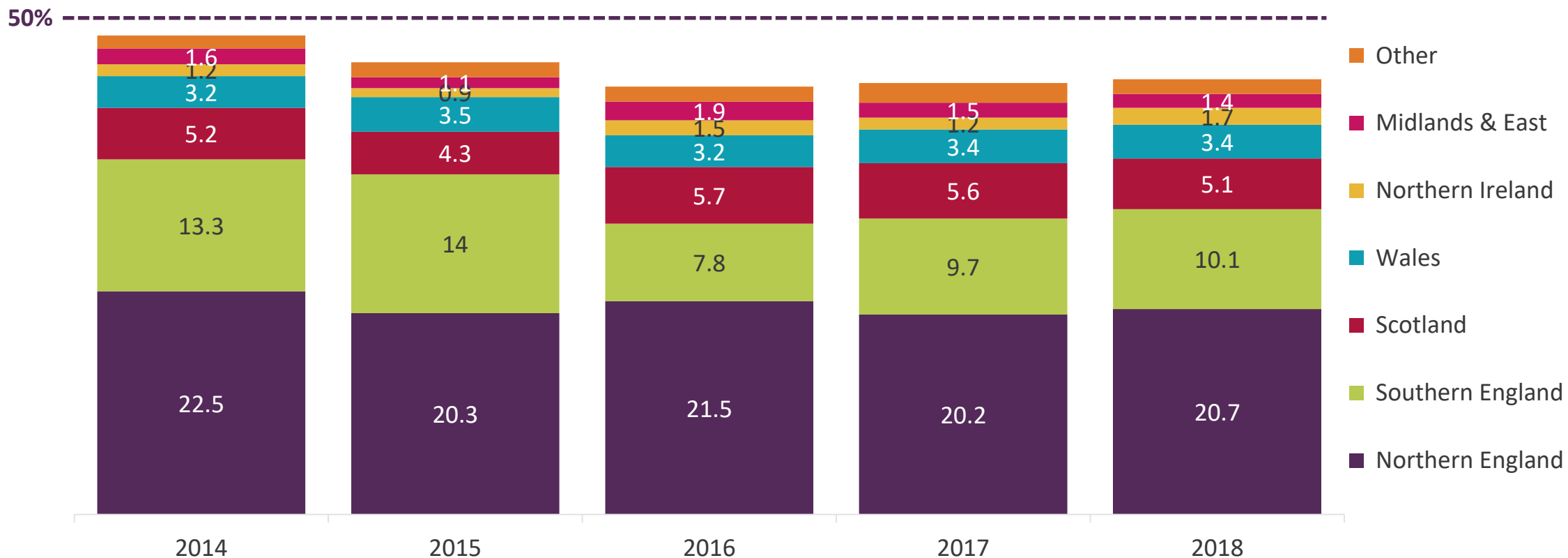


Source: Ofcom/broadcasters

*Closure of BBC Three linear channel

The share of PSB network spend outside London is less than 50%

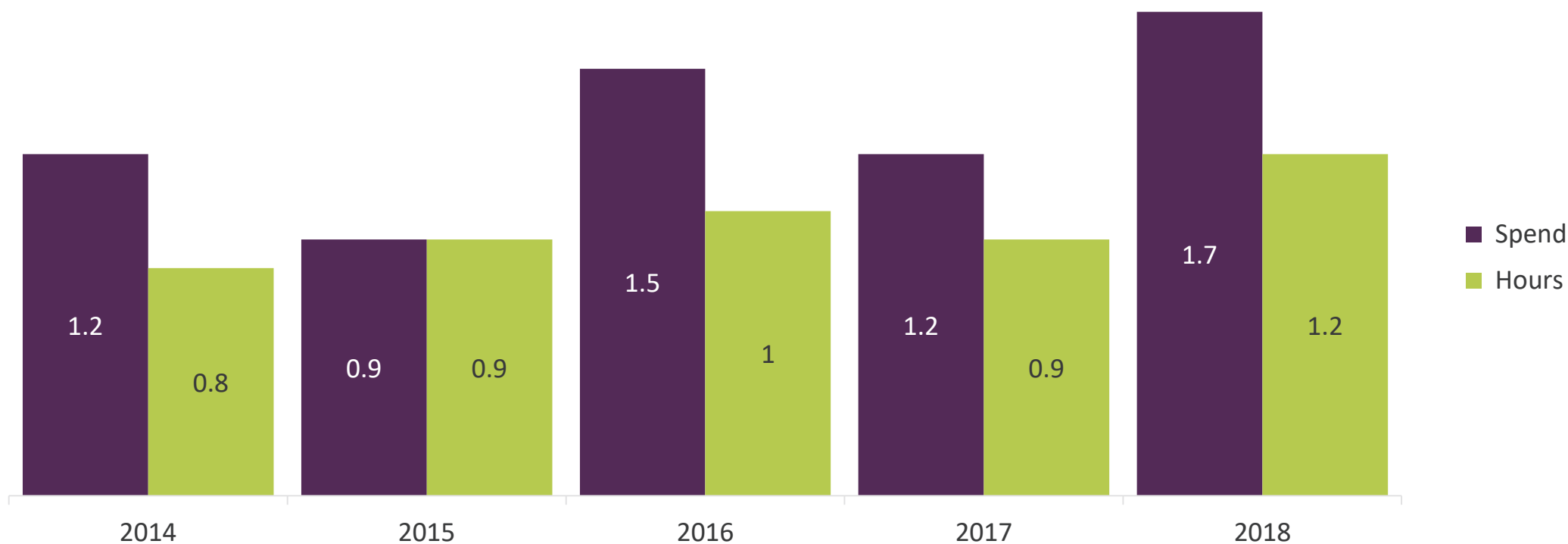
Proportion of qualifying spend by macro-region (%)



Source: Ofcom/broadcasters

BBC drama production has driven increased network spend in Northern Ireland

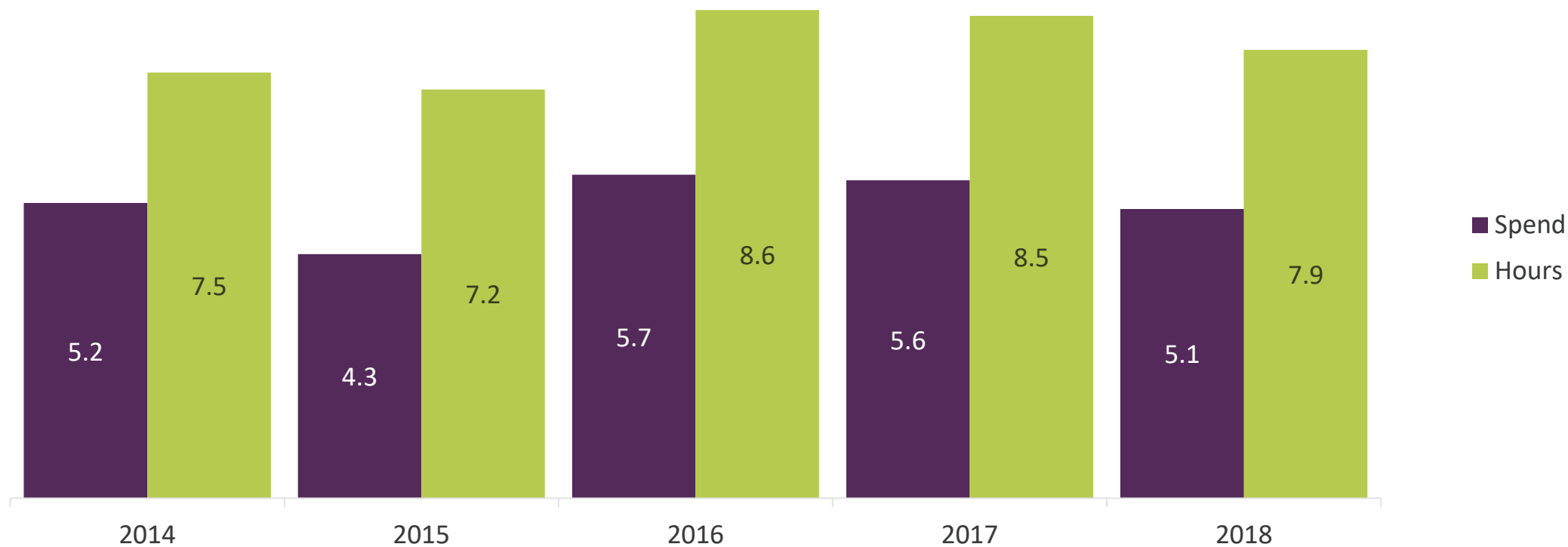
Proportion of qualifying spend and hours (%)



Source: Ofcom/broadcasters

The proportion of PSB network spend is highest in Scotland

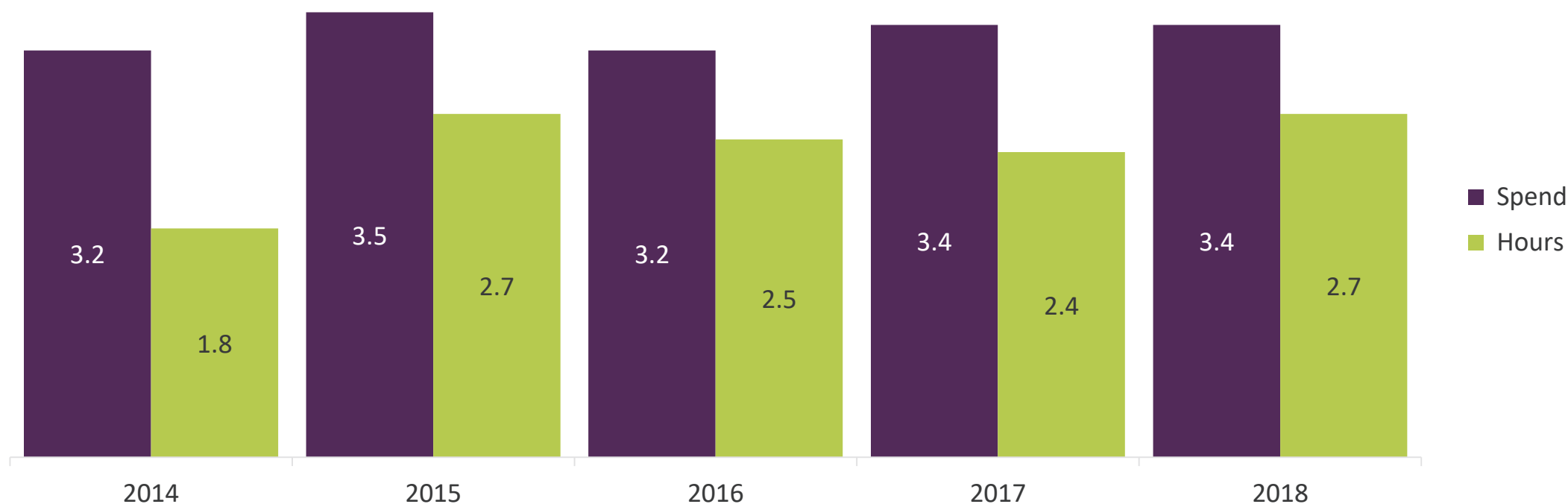
Proportion of qualifying spend and hours (%)



Source: Ofcom/broadcasters

Long-running series have maintained the proportion of network spend in Wales

Proportion of qualifying spend and hours (%)



Source: Ofcom/broadcasters

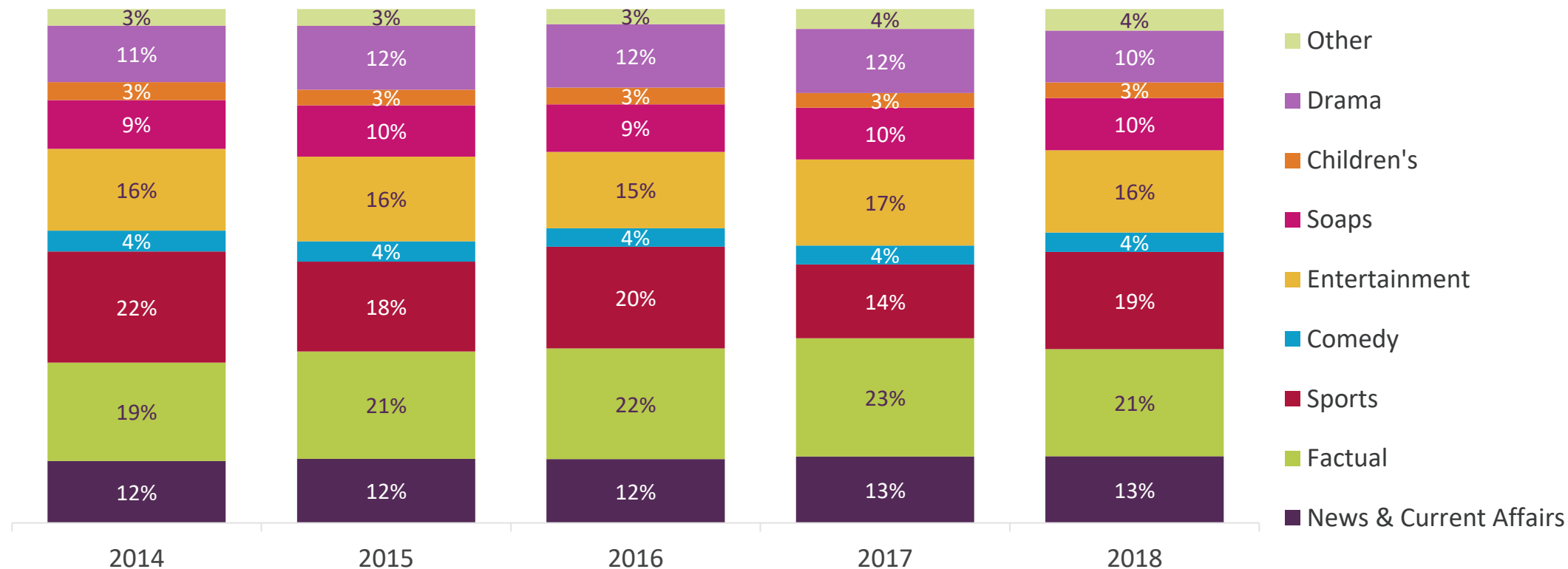
PSBs account for most of the commissions in the nations

	Northern Ireland	Scotland	Wales
Spending	PSB network - £26m Other - £39m	PSB network - £123m Other - £100m	PSB network - £76m Other - £98m
Key genres	Factual entertainment (42%), General factual (20%), Drama (13%)	Sport (31%), Entertainment (27%), General Factual (20%)	Factual entertainment (34%), General factual (25%), Drama (18%)
No. of producers	6	20	13

Source: O&O, *Regionality trends within the UK production sector*, September 2018

PSB spend across genres continues to be diverse

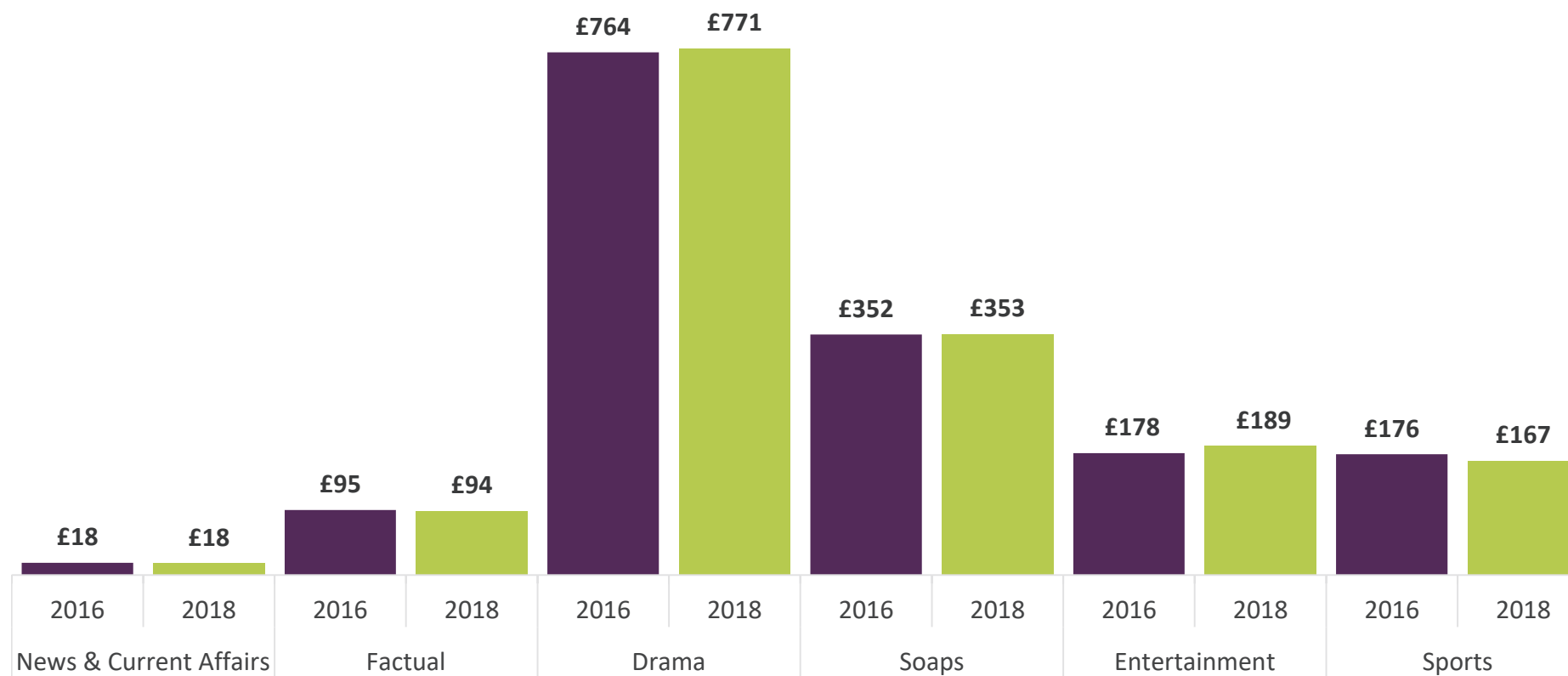
PSB network spend on first-run originations (£000s)



Source: Ofcom/broadcasters

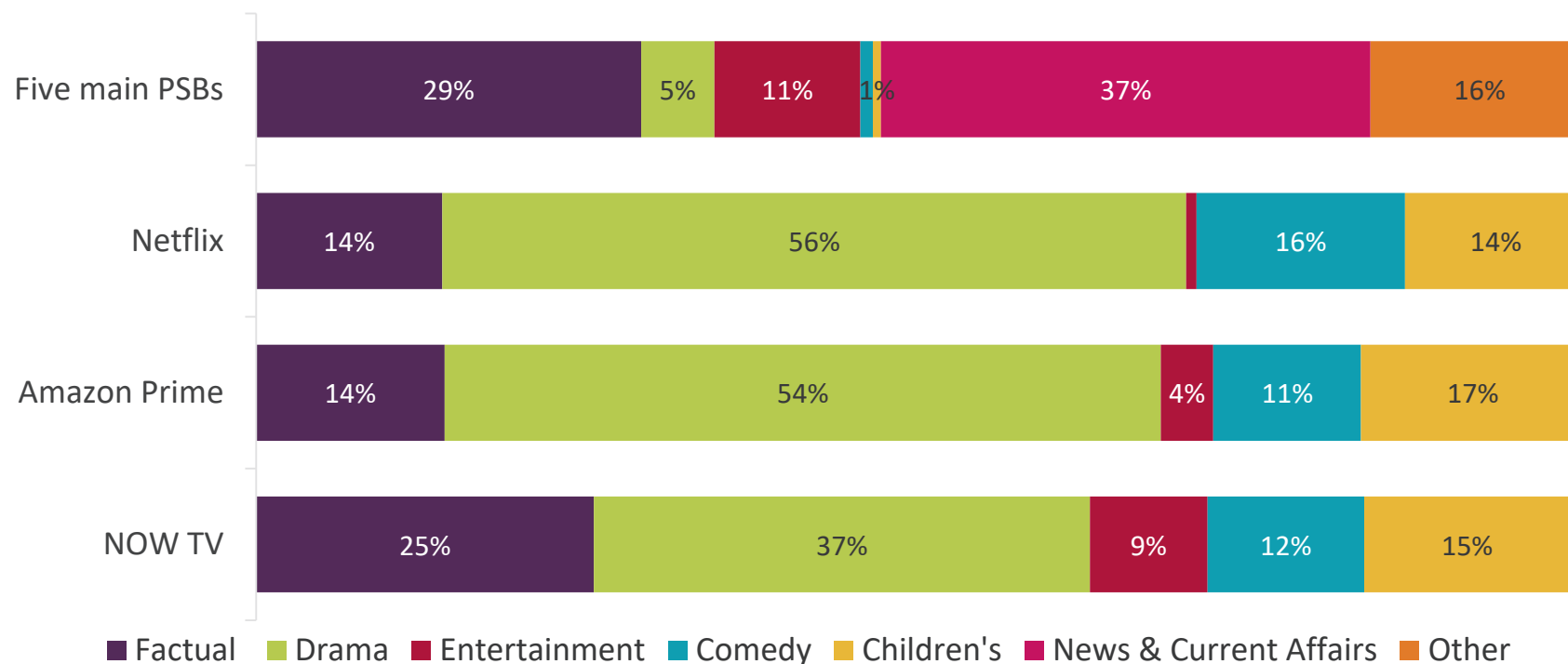
Drama remains the most expensive programming for PSBs

Average PSB network spend per hour on first run UK-originated content, by selected genre (£k)



High spend levels by international SVoD players have resulted in more drama-centric offerings than PSBs

PSB first-run UK originated hours vs SVoD hours



SVoD	623 hours*
PSB channels	32,188 hours

But PSBs outstrip them in terms of volume of first-run UK originations

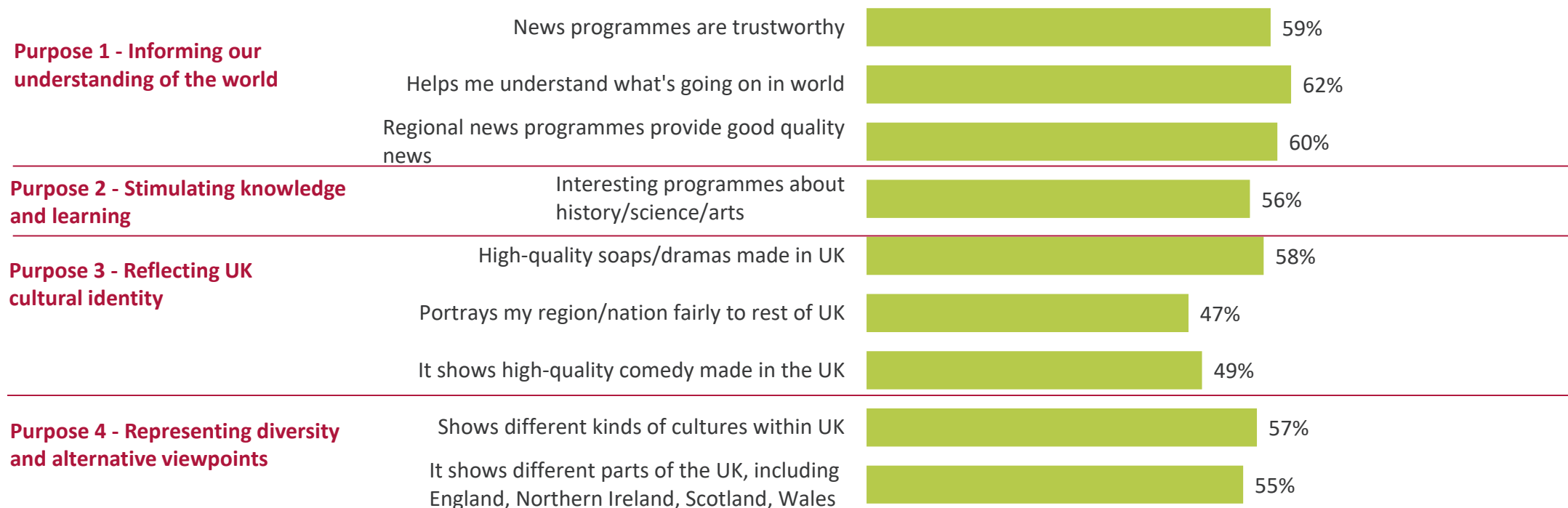
Source: Ofcom/broadcasters, Ampere Analysis (Dec 2018)

*Netflix, Amazon and Sky Originals where primary production country is the UK

So what do people think about PSB?

The majority of audiences highlighted that PSB programmes continue to inform their understanding of the world

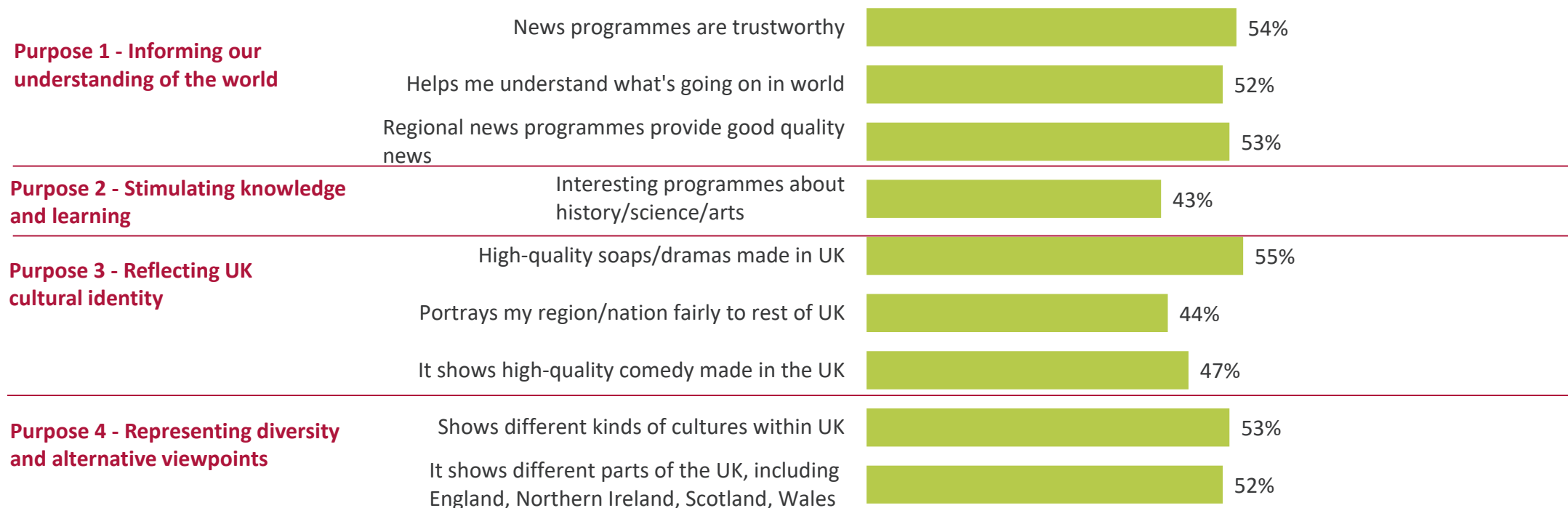
Delivery of PSB purposes: 2018 (7-10 ratings)



Source: Ofcom PSB Tracker 2018

Although among 16-24s who watch PSB channels, this falls to just over half

Delivery of PSB purposes: 2018 (7-10 ratings)

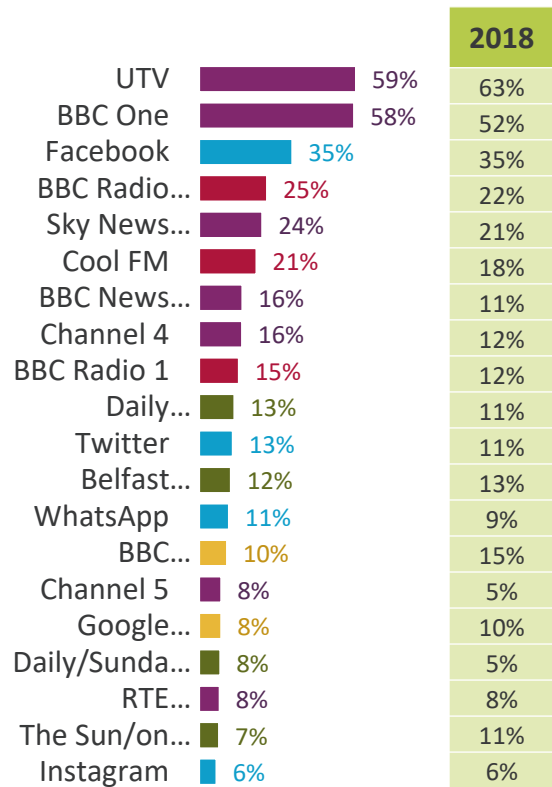


Source: Ofcom PSB Tracker 2018

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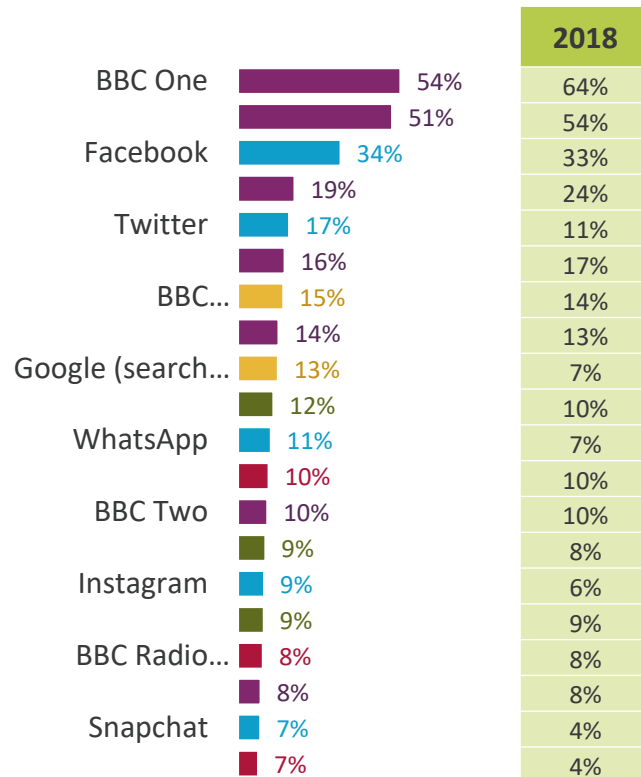


Six in ten adults in Northern Ireland use UTV or BBC One for news



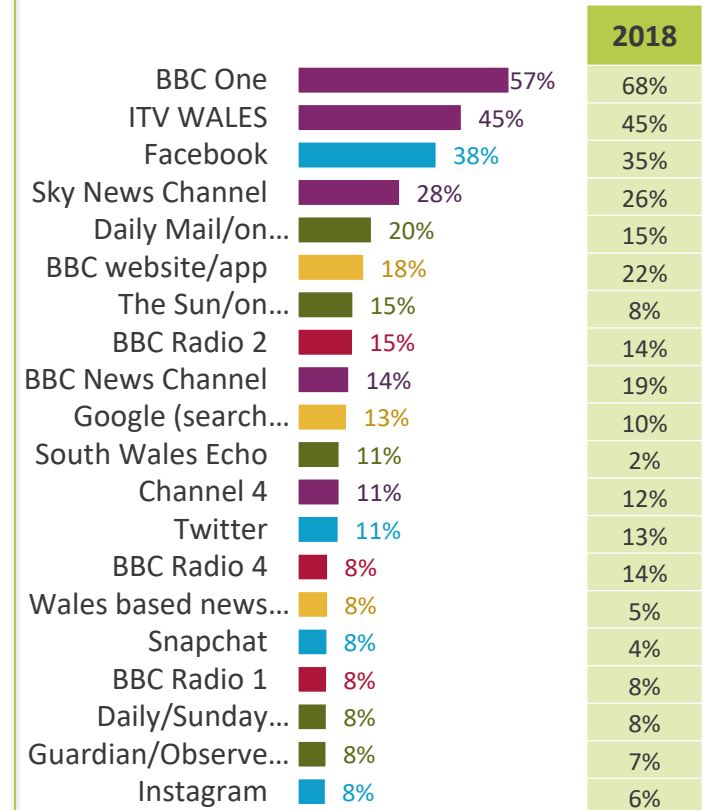
Top 20 sources of news in general in Northern Ireland

In Scotland, BBC One remained the top news source in 2018



Top 20 sources of news in general in Scotland

In Wales, BBC One remained the top news source in 2018

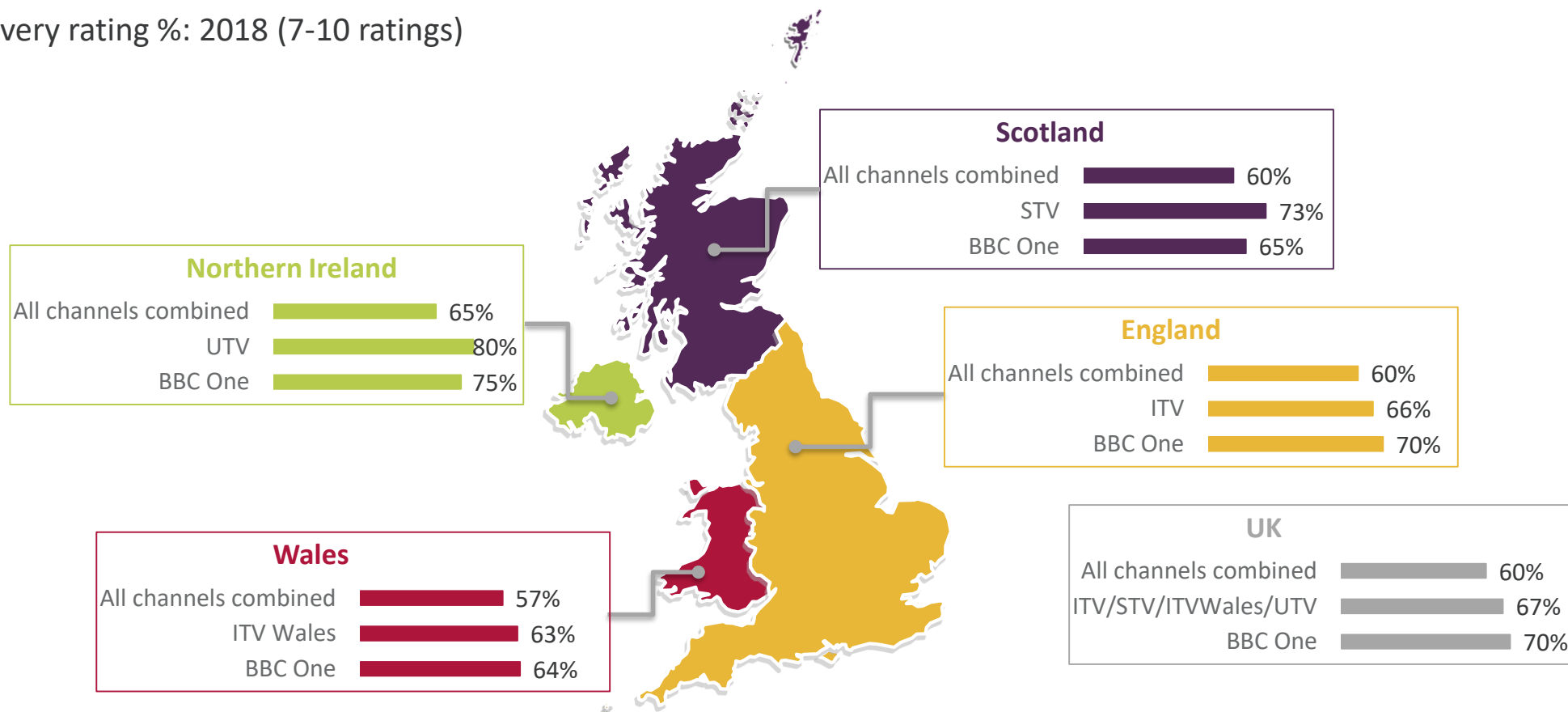


Top 20 sources of news in general in Wales

Source: Ofcom News Consumption survey 2019

And audiences largely believe that regional news provision is of high quality

% Delivery rating %: 2018 (7-10 ratings)



Source: Ofcom PSB Tracker 2018