

# **BBC Trust**

## **Service Review of BBC Television:**

**BBC One, BBC Two, BBC Three & BBC Four**

**Supporting performance analysis**

July 2014

## Contents

(1)	Serving all audiences .....	4
(2)	The quality and distinctiveness of BBC television .....	19
(3)	The cost-effectiveness of BBC television .....	25

## QRIV framework

The QRIV performance framework is a standard part of the Trust's Service Reviews and is used as a basis for this performance analysis.

- **Quality:** measured in terms of audience perception of various aspects of the quality of programmes and channels
- **Reach:** the extent to which BBC services are used by the audience
- **Impact:** the extent to which BBC content delivers the BBC's public purposes. *The audience research and public consultation are the primary evidence sources we use to assess delivery here.*
- **Value for money:** a consideration of performance alongside cost to provide a perspective on cost-effectiveness.

## Television Review – Performance Analysis

Figure 1: Trend in weekly reach of each BBC Television channel, 2010-11 to 2013-14	4
Figure 2: Weekly reach: UK PSB channel portfolios. ....	5
Figure 3: BBC television’s share of viewing: Individuals (%). BBC Three 16-34s (%). 6	6
Figure 4: Weekly reach of BBC television by demographic group.....	7
Figure 5: Weekly reach of BBC One by demographic group.....	8
Figure 6: Weekly reach of BBC Two by demographic group.....	8
Figure 7: Weekly reach of BBC Three by demographic group.....	9
Figure 8: Weekly reach of BBC Four by demographic group. ....	10
Figure 9: BBC television’s share of viewing by demographic group.....	11
Figure 10: Time spent viewing BBC television by demographic group.....	12
Figure 11: BBC One average audience: age profile.....	13
Figure 12: BBC Two average audience: age profile.....	14
Figure 13: BBC Three average audience: age profile.....	15
Figure 14: BBC Four average audience: age profile.....	15
Figure 15: BBC One-Four average audience: ethnicity profile.....	16
Figure 16: BBC One-Four average audience: socio economic profile.....	17
Figure 17: Weekly reach of BBC television by nation.....	17
Figure 18: Weekly reach of BBC television by English Region.....	18
Figure 19: Mean general impression scores.....	19
Figure 20: Average AI scores by channel. BBC Three 16-34.....	20
Figure 21: Fresh and new scores by channel. BBC Three 16-34.....	21
Figure 22: 7-9pm BBC One Top 10 programmes as % of coverage.....	22
Figure 23: BBC One top programmes, ranked by % of airtime 7-9pm, 2007-08.....	22
Figure 24: BBC One top programmes, ranked by % of airtime 7-9pm, 2010-11.....	23
Figure 25: BBC One top programmes, ranked by % of airtime 7-9pm, 2013-14.....	23
Figure 26: BBC One average AI score by daytime day-parts.....	24
Figure 27: BBC Two average AI score by daytime day-parts.....	24
Figure 28: Content spend on each channel, 2010-11 to 2013-14.....	25
Figure 29: Cost per viewer hour of BBC One, BBC Two, BBC Three and BBC Four, 2010-11 – 2013-14.....	27

## (1) Serving all audiences

This section presents the performance of the BBC television portfolio overall (i.e. the combined performance BBC One, Two, Three and Four and associated red button content) as well as the performance of each BBC TV channel in serving audiences over the period 2010-11 to 2013-14.

We consider BBC television's performance in serving audiences overall as well as by age, socio-economic status and ethnic background, and in the nations and regions.

In this section, we use the following metrics:

- **Weekly reach** – the number of people (or percentage of a population) that watch a channel for at least fifteen consecutive minutes in a given week.
- **Share** – the percentage of the total viewing audience watching over a given period of time
- **Time Spent** – the hours and minutes watched per week per viewer
- **Average audience** - the minute by minute average audience covered by a programme transmission.

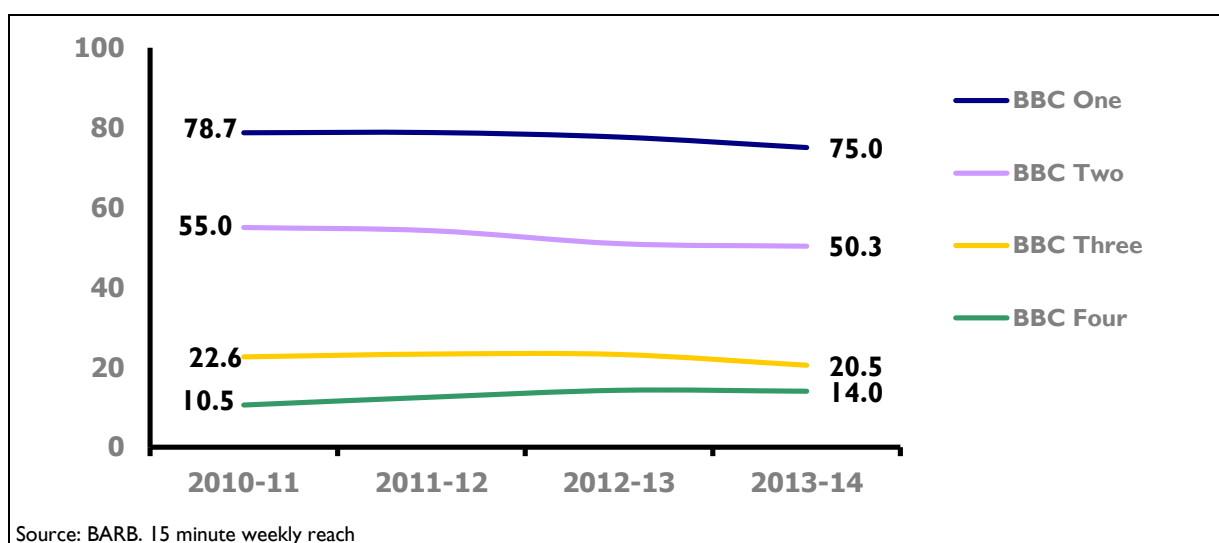
### Overall trends

#### 1.1 The audience reach of BBC television overall and by channel

In 2013-14, BBC One's weekly reach stood at 75%, falling almost four reach points compared with 2010-11. The greatest decline in reach year on year took place between 2012-13 and 2013-14. BBC Two's decline in weekly reach between 2010-11 and 2013-14 has been heavier, falling around five points over this period. Its performance stabilised between 2012-13 and 2013-14.

For BBC Three, after annual increases, weekly reach plateaued in 2012-13 and then fell back by three percentage points in 2013-14. The weekly reach of BBC Four increased each year between 2010-11 and 2012-13 but fell very slightly in 2013-14.

**Figure 1: Trend in weekly reach of each BBC Television channel, 2010-11 to 2013-14**

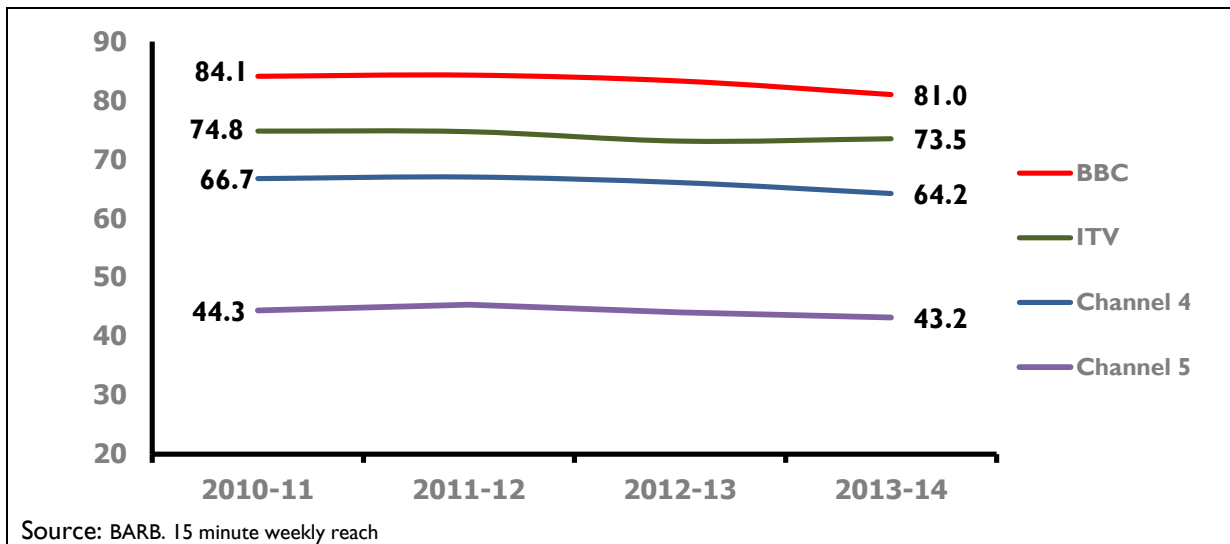


## 1.2 The audience reach of the UK Public Service Broadcaster portfolios

81% of individuals in the UK watched BBC television each week in 2013-14, falling from 84% in 2010-11.

The ITV, Channel 4 and Channel 5 portfolios<sup>1</sup> have all experienced declines between 2010-11 and 2013-14. Channel 5 has experienced the most stability but also experienced decline in 2013-14.

**Figure 2: Weekly reach: UK PSB channel portfolios.**



## 1.3 Share of BBC television viewing overall and by channel

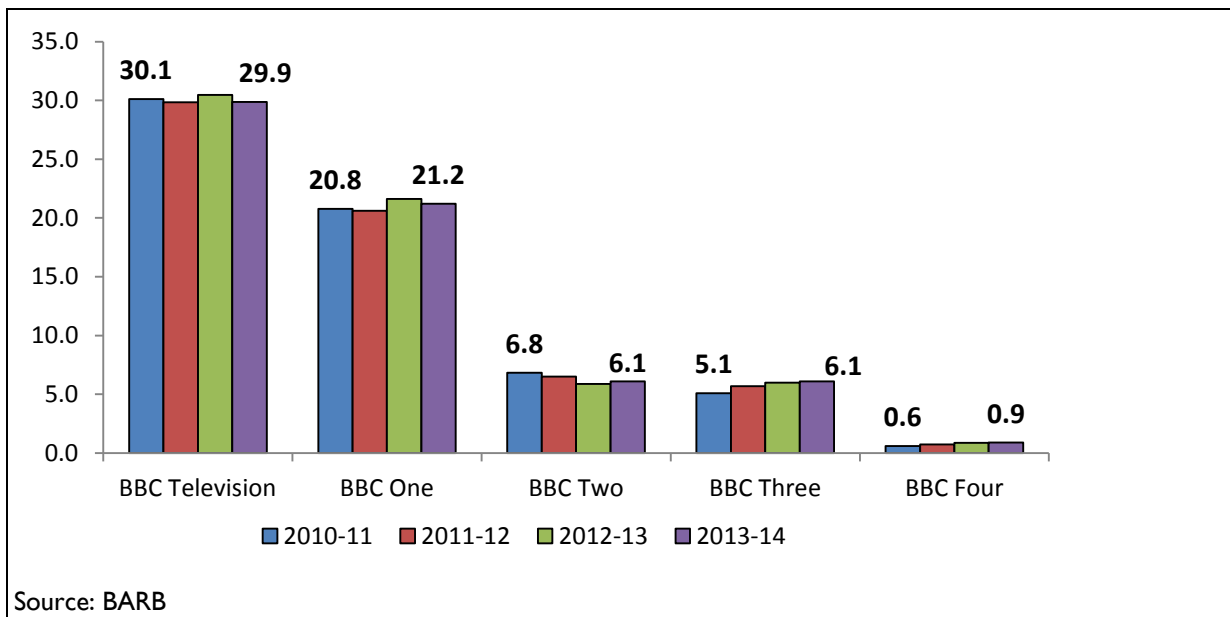
The overall audience share for BBC television has been steady between 2010-11 and 2013-14. The share in 2010-11 stood at 30.1%, compared to 29.9% in 2013-14.

BBC One has maintained a relatively stable share of viewing. Share hit a peak of 21.6% in 2012-13, helped by a year of special events including London 2012 Olympics. BBC One's share fell back slightly in 2013-14 to 21.2% while BBC Two's share of viewing fell from 6.8% in 2010-11 to 6.1% in 2013-14.

BBC Three and BBC Four's share of viewing increased each year between 2010-11 and 2012-13. In 2013-14, BBC Four's share remained unchanged year on year at 0.9%, while BBC Three's share of viewing amongst 16-34 year olds experienced a small increase, rising from 6.0% to 6.1%.

<sup>1</sup>BBC portfolio covers BBC One, Two, Three and Four and associated Red Button content, but not CBBC, CBeebies, BBC News Channel or BBC Parliament. ITV portfolio includes ITV1,2,3 & 4, but not CITV. Channel 4 portfolio includes Channel 4, C4, E4, More4, S4C, Film4. Channel 5 portfolio includes Channel 5, Channel 5 + 24, 5 USA, 5\*. ITV, Channel 4 and Channel 5 portfolios all include HD and + 1 channels.

**Figure 3: BBC television's share of viewing: Individuals (%). BBC Three 16-34s (%).**



## *Trends by audience demographic group*

### **1.4 BBC television's reach by demographic group**

The figure below shows the changes in the weekly reach of BBC television by different demographic groups comparing 2010-11 and 2013-14.

BBC television's overall reach remains higher amongst women than men. In 2013-14, BBC television reached 83% of women compared to 79% of men.

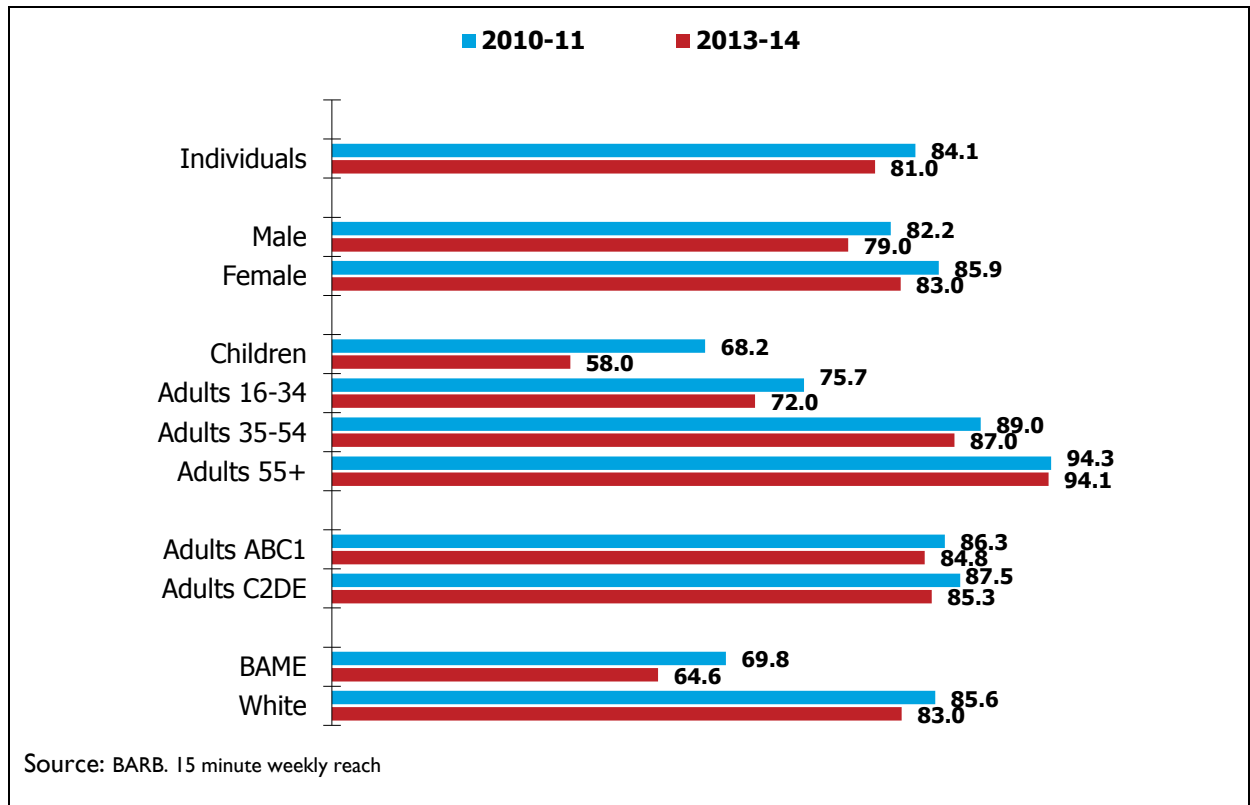
BBC television's reach is largely unchanged amongst adults aged 55 or over (94.1%). The declines in reach were more marked for other age groups. Reach amongst adults aged 16-34 fell by almost four percentage points and reach amongst children (aged 4 -15) fell by over 10 points, mostly as a result of bespoke children's content being removed from BBC One and BBC Two in this time period.

Between 2010-11 and 2013-14 there was some decline in weekly reach amongst ABC1 adults and C2DE adults. Reach amongst C2DE adults remains higher, although reach did fall slightly more for this group<sup>2</sup>.

<sup>2</sup> These are the standard UK classifications for social grades based on the occupation of the chief income earner in a household. The ABC1 occupations cover higher managerial, administrative or professional (A), intermediate managerial, administrative or professional (B) and supervisory or clerical and junior managerial, administrative or professional (C1). The C2DE occupations cover skilled manual workers (C2), semi and unskilled manual workers (D), and casual workers, pensioners, and others who depend on the welfare state for their income (E).

BBC television has a much higher reach amongst white audiences compared to black, Asian and minority ethnic (BAME) audiences. This reach gap grew in 2013-14, and there is now an 18 percentage point gap between the two audience groups.

**Figure 4: Weekly reach of BBC television by demographic group.**



### 1.5 BBC One's reach by demographic group

BBC One's reach remains higher amongst women than men. In 2013-14, BBC One reached 77.6% of women compared to 72.2% of men.

Comparing performance by age in 2010-11 and 2013-14, the declines in BBC One's weekly reach have been greatest amongst children and adults aged 16-34.<sup>3</sup> BBC One's weekly reach amongst adults aged 55 or over was more stable.

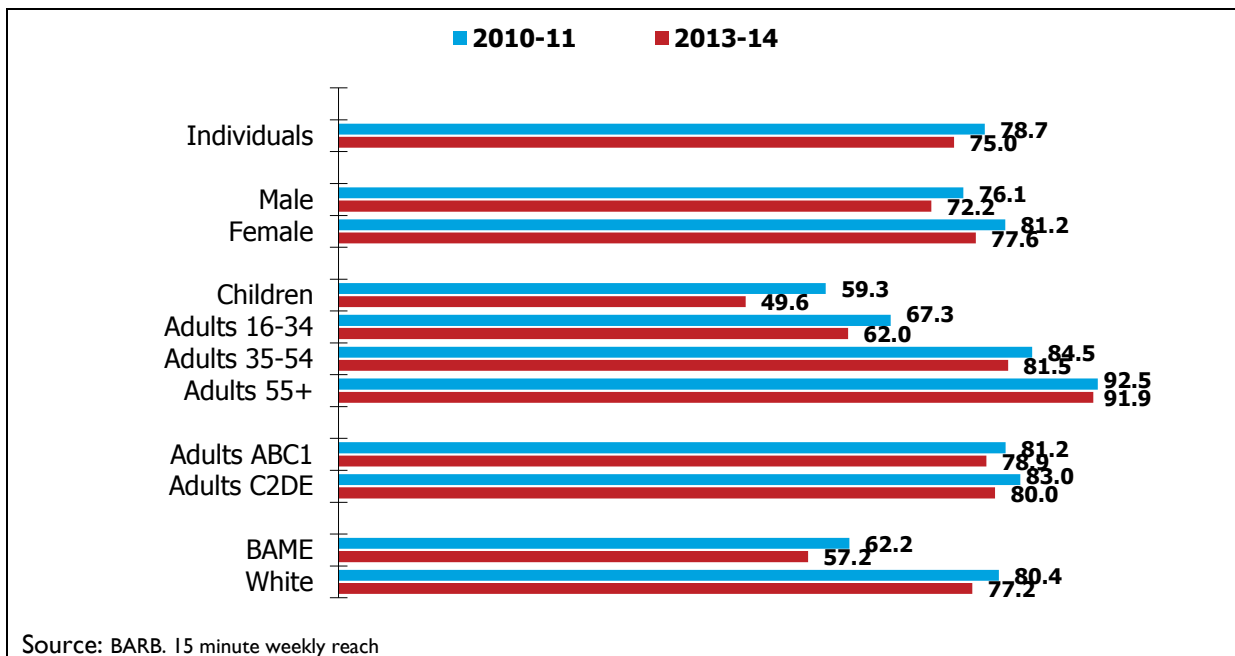
Between 2010-11 and 2013-14 there was some decline in BBC One's weekly reach amongst ABC1 adults. Reach amongst C2DE adults remains higher, although reach did fall slightly more for this group<sup>4</sup>.

<sup>3</sup> The decline in the number of children watching BBC One and BBC Two in 2013-14 can in part be explained by the change in the way children's programming is scheduled. As part of BBC Television's financial savings plan, from January 2013 dedicated children's content is broadcast only on CBeebies and CBBC.

<sup>4</sup> These are the standard UK classifications for social grades based on the occupation of the chief income earner in a household. The ABC1 occupations cover higher managerial, administrative or professional (A), intermediate managerial, administrative or professional (B) and supervisory or clerical and junior managerial, administrative or professional (C1). The C2DE occupations cover skilled manual workers (C2), semi and

BBC One's reach fell more steeply amongst BAME audiences compared with white audiences and, in 2013-14, there was a 20 reach point difference between these two groups.

**Figure 5: Weekly reach of BBC One by demographic group.**



### 1.6 BBC Two's reach by demographic group

Roughly equal proportions of men and women watch BBC Two. In 2013-14, BBC Two reached 50.9% of women compared to 49.7% of men.

Comparing performance by age 2010-11 and 2013-14, the declines in BBC Two's weekly reach have been greatest amongst children and adults aged 16-34. BBC Two's weekly reach amongst adults aged 55 experienced the smallest decline.

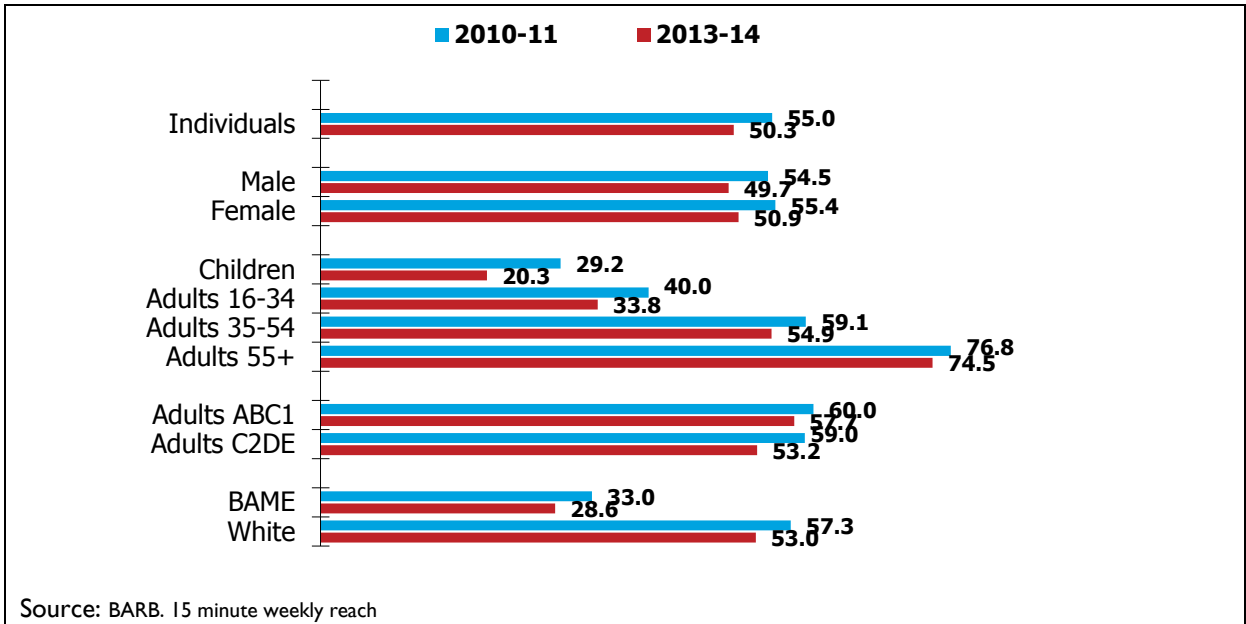
There was some decline in BBC Two's weekly reach amongst ABC1 adults in 2013-14 compared with 2010-11, and a more marked decline (nearly six percentage points) in reach amongst C2DE adults over the period.

The declines in BBC Two's reach amongst BAME audiences and amongst white audiences were similar. In 2013-14, BBC Two reached 28.6% of BAME audiences compared to 53% of white audiences.

**Figure 6: Weekly reach of BBC Two by demographic group.**

unskilled manual workers (D), and casual workers, pensioners, and others who depend on the welfare state for their income (E).





### 1.7 BBC Three’s reach by demographic group

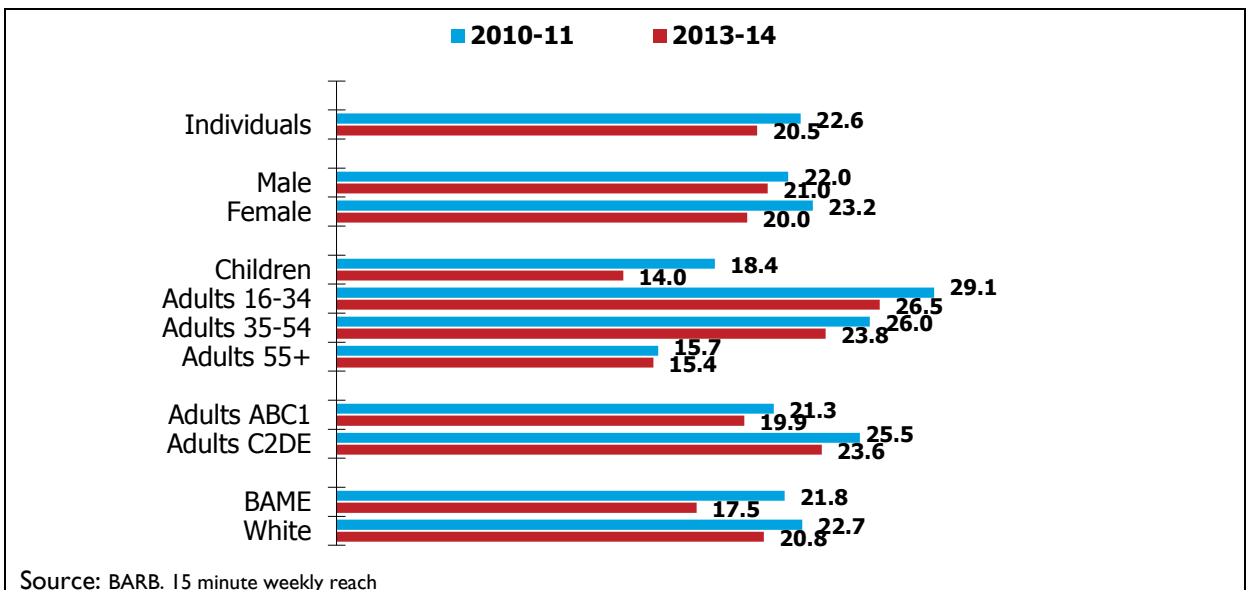
Similar proportions of men and women watch BBC Three although the decline in reach was steeper amongst women when comparing 2010-11 with 2013-14.

BBC Three has a target audience of adults aged between 16 and 34. Weekly reach amongst this target audience fell from 29.1% to 26.5% between 2010-11 and 2013-14.

There was some decline in BBC Three’s weekly reach amongst ABC1 adults and C2DE adults in 2013-14 compared with 2010-11. Reach amongst C2DE adults remains higher.

BBC Three experienced a greater decline in reach amongst BAME viewers compared to white viewers.

**Figure 7: Weekly reach of BBC Three by demographic group.**



## 1.8 BBC Four's reach by demographic group

BBC Four has increased its reach amongst all demographic groups between 2010-11 and 2013-14.

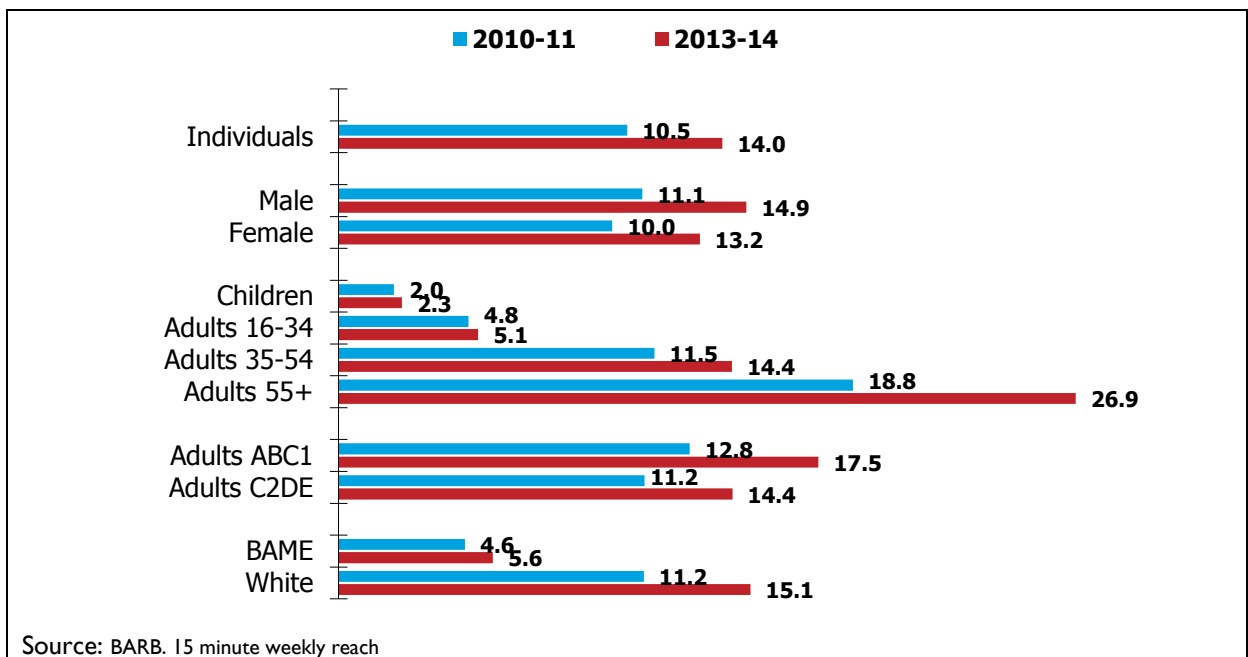
BBC Four is watched by more men than women, with the increase in reach in 2013-14 compared to 2010-11 more pronounced amongst the former.

Looking at the different age groups, the most marked increase (over eight percentage points) in BBC Four's weekly reach was amongst adults aged 55 or over. In 2013-14, 26.9% of adults in this age group watched BBC Four each week.

BBC Four's increase in weekly reach was greater amongst ABC1 adults than C2DE adults.

In 2013-14, BBC Four's reach amongst white audiences was significantly higher than amongst BAME audiences. The reach gap between the two groups is now nearly ten percentage points.

**Figure 8: Weekly reach of BBC Four by demographic group.**



## 1.9 BBC television's share of viewing by demographic group

BBC television's share of viewing has remained stable between 2010-11 and 2013-14, with its share of individuals standing at 29.9% in 2013-14 compared to 30.1% in 2010-11.

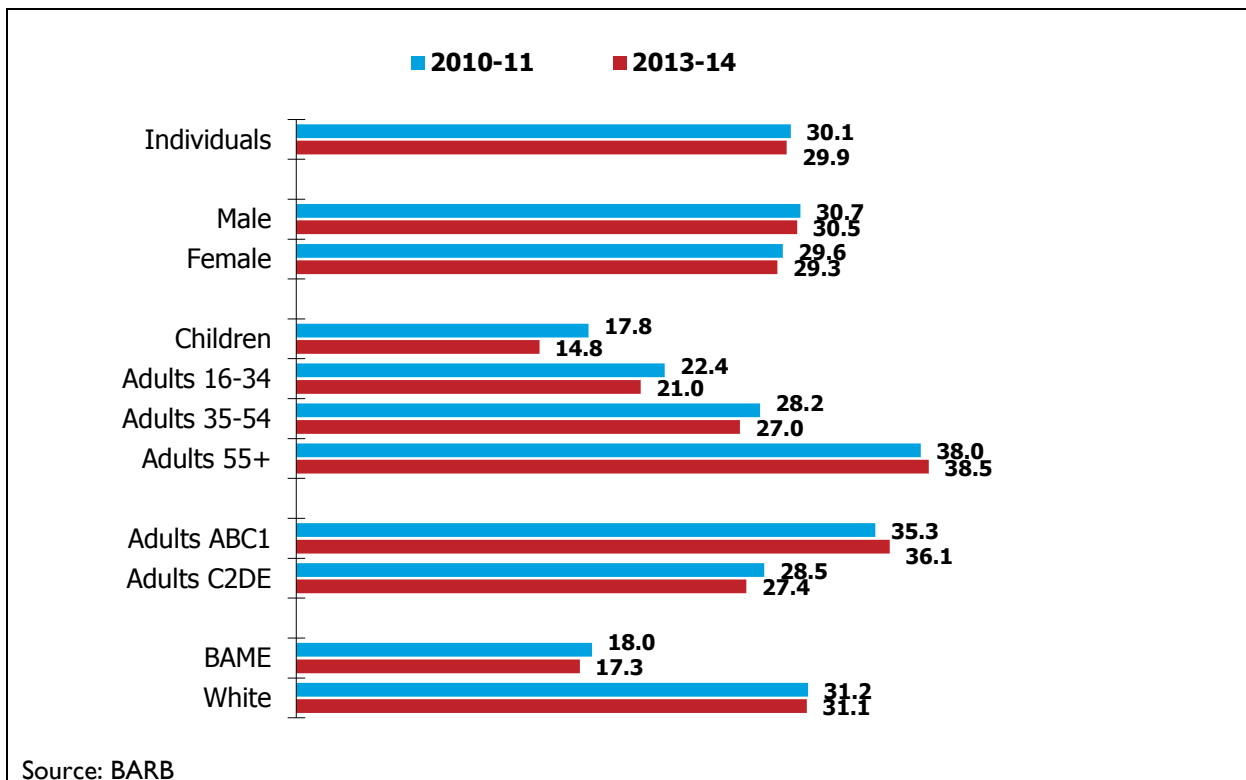
BBC television's share of viewing amongst men and women is similar with share increasing amongst both groups in 2013-14 compared to 2010-11.

Looking at the different age groups, BBC television's share of viewing amongst children declined markedly between 2010-11 and 2013-14. Share declined slightly amongst the different adult age groups except for viewers aged 55 or over where share increased to 38.5% in 2013-14, over 17 share points higher than viewers aged 16-34.

There are also share difference between ABC1 and C2DE viewers. BBC television's share of viewing amongst ABC1 viewers increased 36.1% in 2013-14, nearly nine percentage points greater than C2DE viewers, where BBC television's share fell back to 27.4%.

BBC television's share of viewing amongst BAME viewers is considerably lower than its share amongst white viewers.

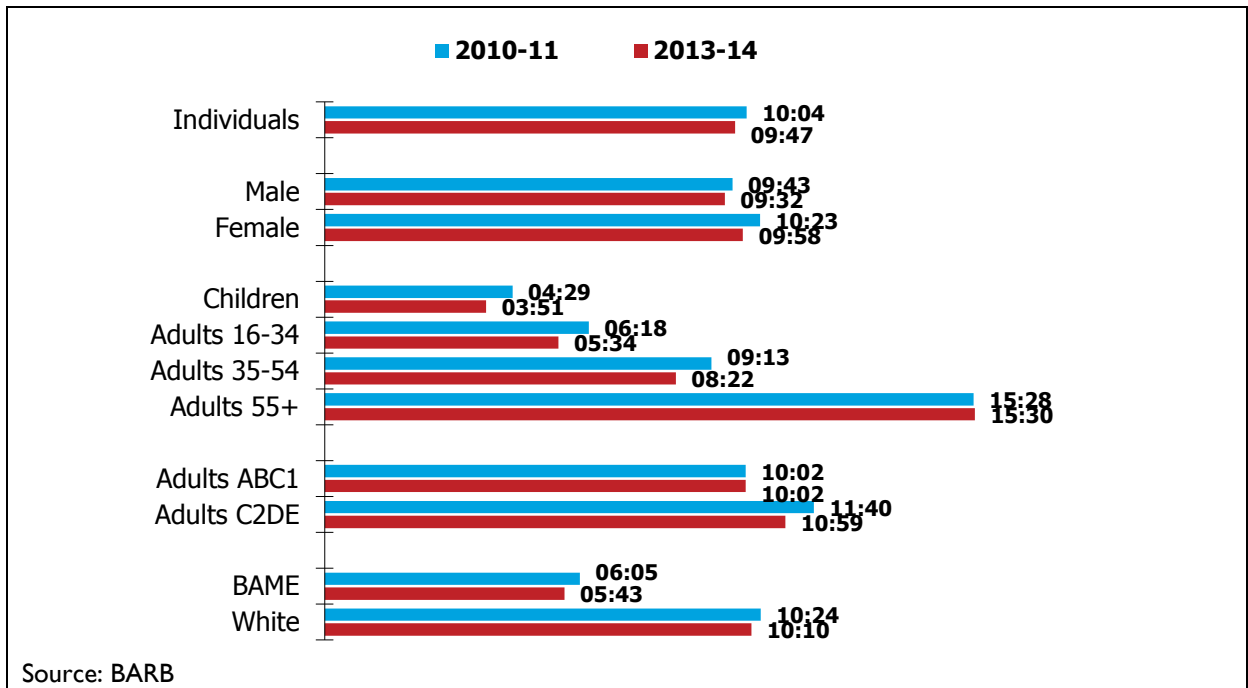
**Figure 9: BBC television's share of viewing by demographic group**



## 1.10 Time spent viewing BBC television by demographic group

Adults aged 55 or over and ABC1 adults still spend as much time watching BBC television in 2013-14 as in 2010-11. Time spent viewing BBC television has fallen amongst other audience groups, particularly amongst younger viewers and Adults aged between 35 and 54.

**Figure 10: Time spent viewing BBC television by demographic group**



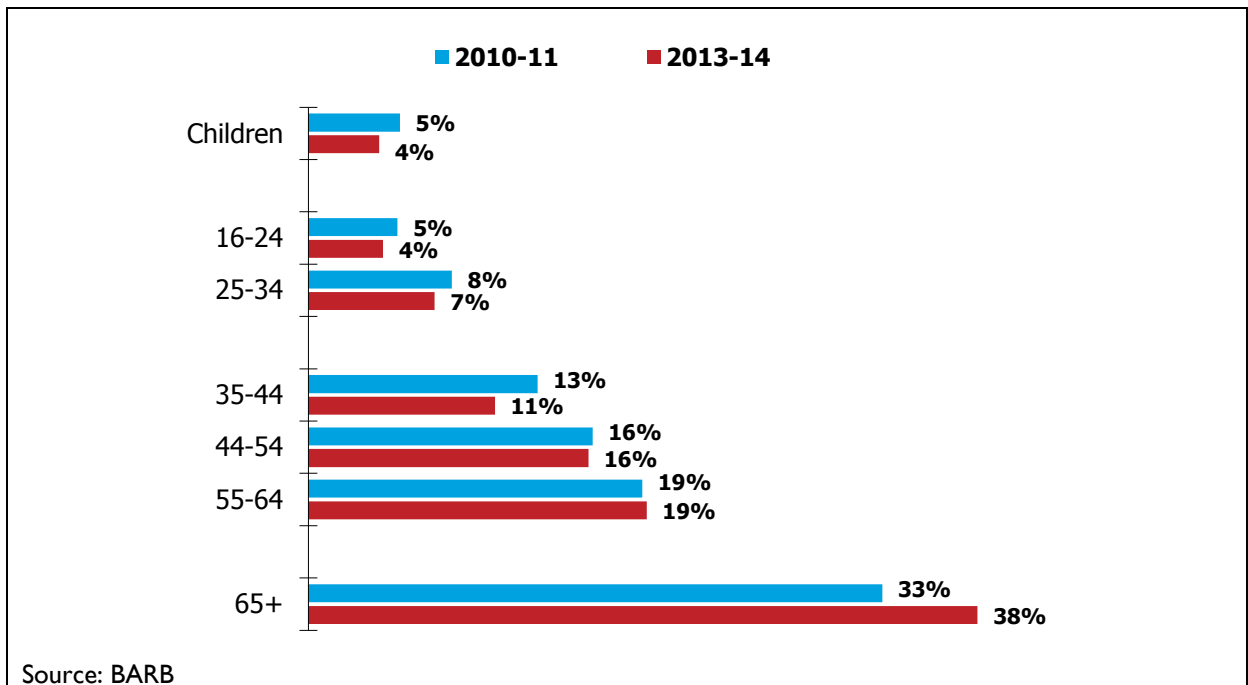
## Audience Profiles of the BBC Channels

### 1.11 Age profile of the average BBC One viewer

The average age of each channel is measured using median age, as this is less affected by outliers and skewed data than the mean.

The average age of the BBC One viewer has increased by one year every year since 2010-11 rising from 56 in 2010-11 to 59 in 2013-14. Children made up 4% of BBC One viewing in 2013-14, having fallen one percentage point since in 2010-11. Adults aged 65 or over account for 38% of viewing compared to 33% three years earlier. There was a decline amongst adults aged 35-44 years old, making up 11% of overall viewing in 2013-14 compared to 13% three years previously.

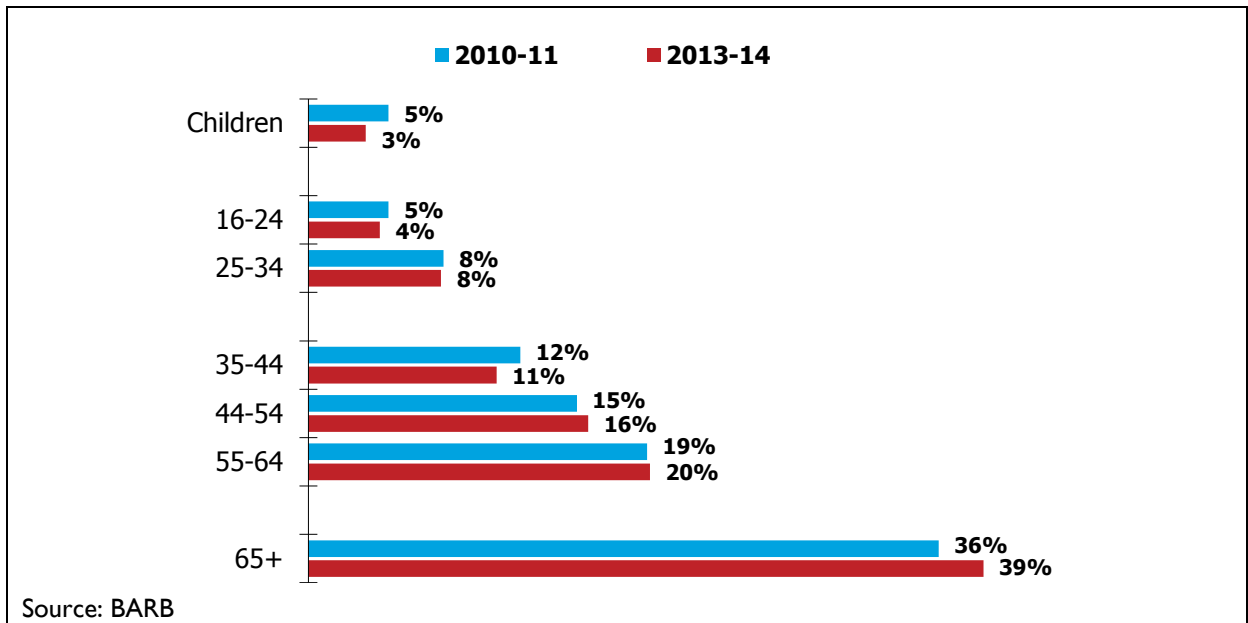
Figure 11: BBC One average audience: age profile



### 1.12 Age profile of the average BBC Two viewer

The average age of the BBC Two viewer increased from 58 to 60 between 2010-11 and 2013-14. It was 60 in 2012-13 and has remained unchanged since. Adults aged 65 or over account for the highest proportion of BBC Two viewers, making up 39% of the overall audience. As with BBC One, this age group also experienced the biggest proportionate increase between 2010-11 and 2013-14.

**Figure 12: BBC Two average audience: age profile**

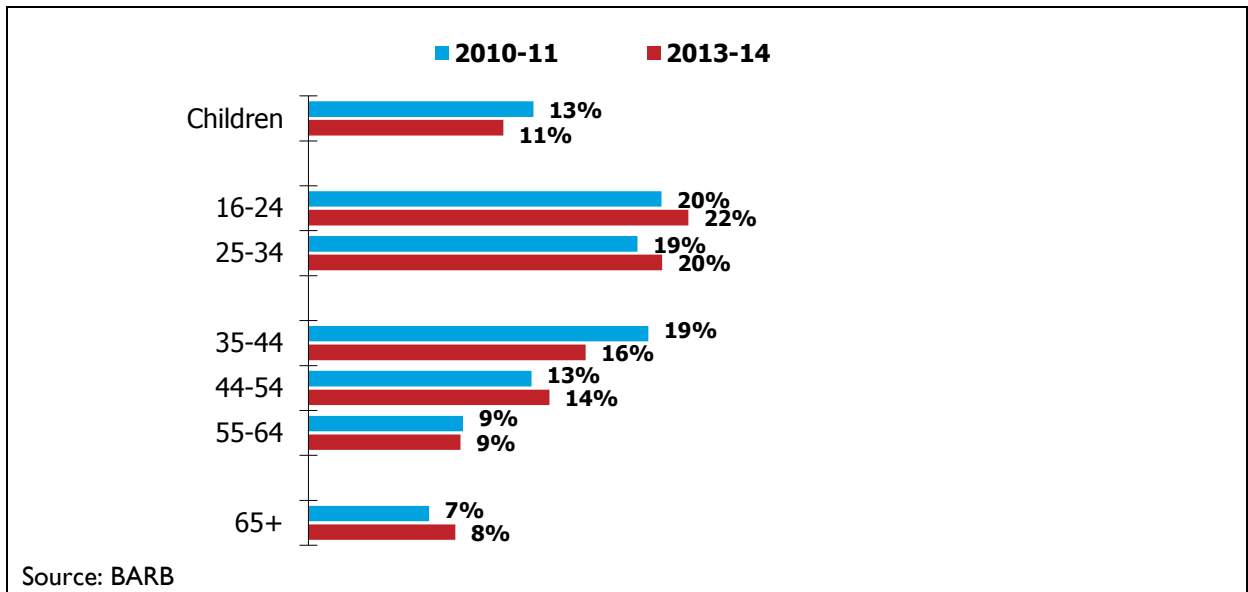


### 1.13 Age profile of the average BBC Three viewer

With a target audience of adults aged between 16 and 34, BBC Three has a very different audience profile to BBC One, Two and Four.

BBC Three's average age has fallen from 34 to 33 over the same period. Between 2010-11 and 2013-14, the proportion of viewing amongst 16-24 year olds and 25-34 year olds increased. Over the same time, viewing decreased amongst children (13% to 11%) and also amongst 35-44 year olds (19% to 16%).

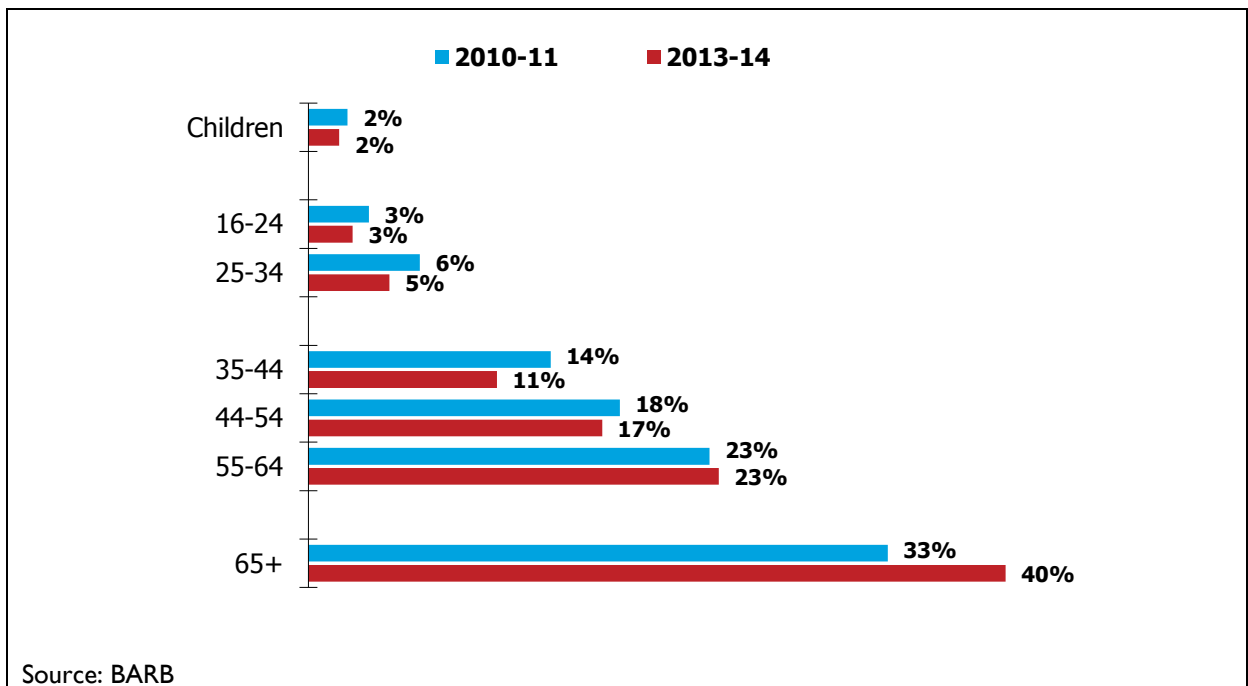
**Figure 13: BBC Three average audience: age profile**



### I.14 Age profile of the average BBC Four viewer

The average age of the BBC Four viewer has increased each year since 2010-11, rising from 58 to 61 in 2013-14. The proportion of viewing accounted for by viewers aged 65 or over increased between 2010-11 and 2013-14, from 33% to 40%. For other age groups there was either proportionate decline over the three years or stability. The highest decline by age group came amongst 35-44s where the proportion of viewing fell from 14% to 11%.

**Figure 14: BBC Four average audience: age profile**

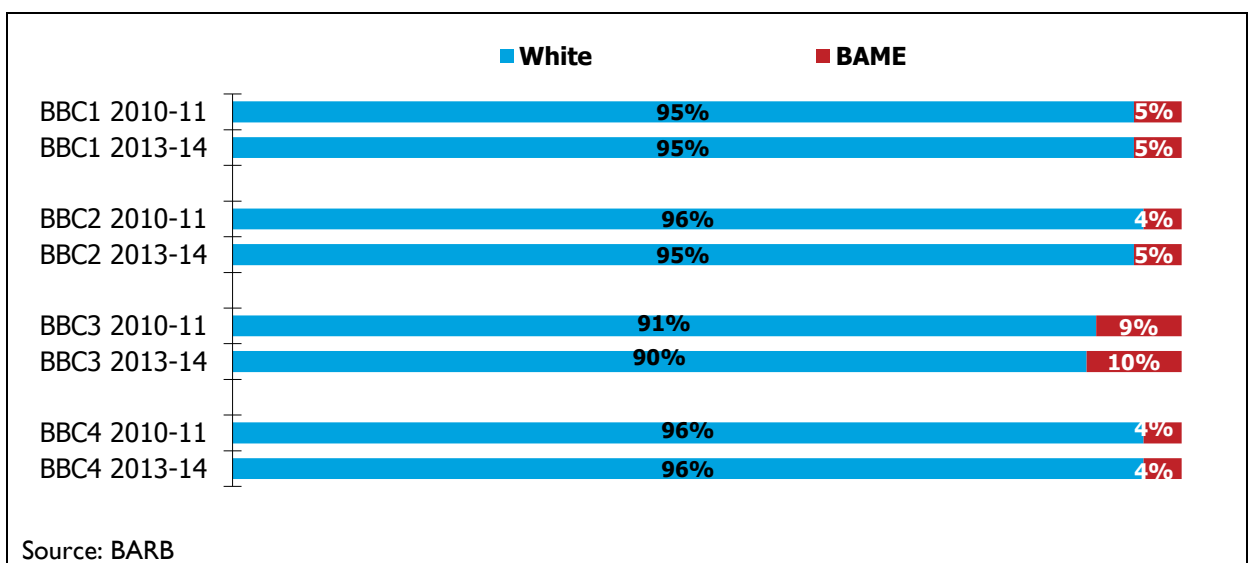


### 1.15 Channel profile by ethnicity

BBC One and BBC Two's average audience is 95% white, with this proportion having remained unchanged for BBC One between 2010-11 and 2013-14 and increasing by one percentage point for BBC Two over the period. This stability comes against a backdrop of an increasing BAME population and a stable white population.

BBC Three has the highest proportion of BAME viewers from any BBC channel. The proportion of BAME viewers increased between 2010-11 and 2013-14 from 9% to 10%. BAME viewers account for just 4% of the BBC Four average audience, both in 2010-11 and 2013-14.

**Figure 15: BBC One-Four average audience: ethnicity profile**



### 1.16 Channel profile by socio-economic status

BBC One has turned more ABC1 between 2010-11 and 2013-14, with the proportion rising from 47% to 50% to make the channel now evenly split between ABC1's and C2DE's.

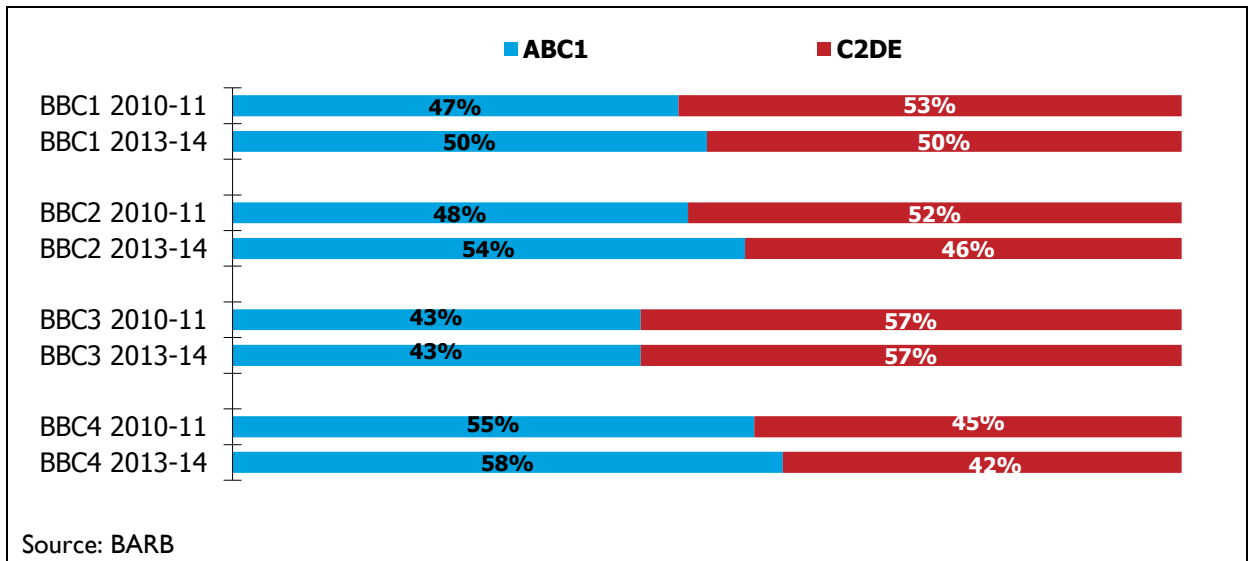
BBC Two's socio-economic profile has shifted since 2010-11, with C2DE viewers shifting from the majority to the minority. C2DE viewers made up 52% of the BBC Two average audience in 2010-11; this fell to 46% by 2013-14.

The majority (57%) of BBC Three's average audience are C2DE viewers (57%), and this proportion has remained stable between 2010-11 and 2013-14.

The ABC1 audience of BBC Four has increased from 55% to 58% between 2010-11 and 2013-14.



**Figure 16: BBC One-Four average audienc: socio economic profile**

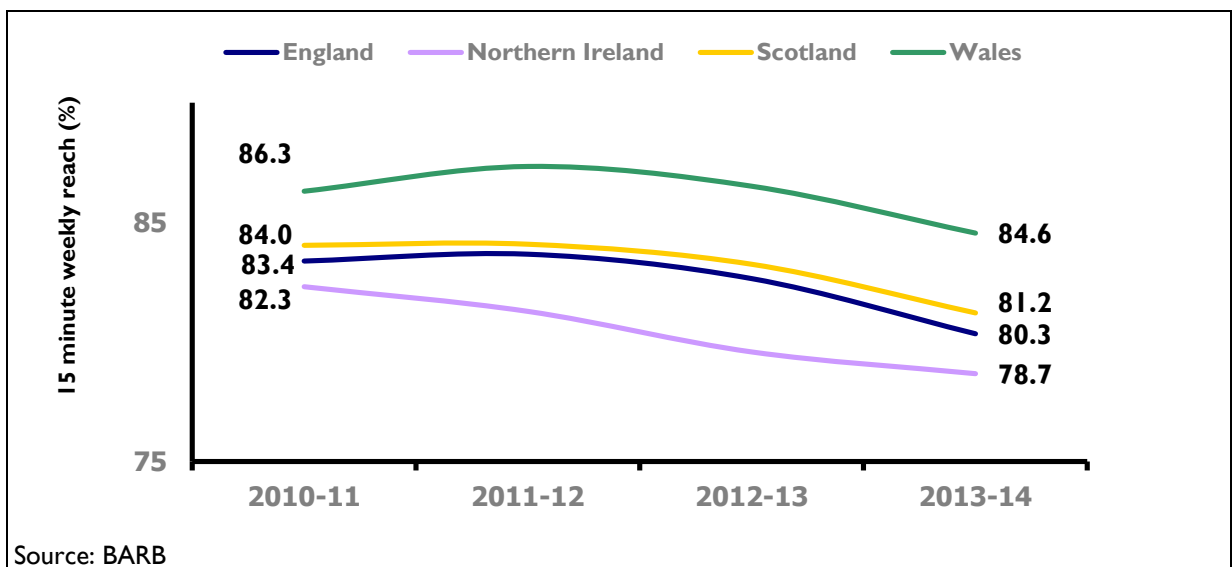


### I.17 BBC television’s reach in the nations

BBC television reaches a greater proportion of people in Wales than any other country. Reach is lowest in Northern Ireland, while England and Scotland have similar levels of reach.

Weekly reach in England, Scotland and Wales fell each year from 2011-12 to 2013-14. In Northern Ireland reach started to decline in 2010-11 and continued at a steeper rate.

**Figure 17: Weekly reach of BBC television by nation**



### 1.18 BBC television's reach in the English regions

The table below shows the differences in BBC television's weekly reach by English region, compared to the reach across England as a whole (80.3%).

Weekly reach is highest in the South West, 4.2 points above the England average. Weekly reach in the South East is also high compared to other regions. Reach has been consistently higher in the South East and South West since 2010-11.

The BBC has the lowest reach in London of all regions with 76.5%, nearly four points below the England average. London has a different demographic make-up to other southern regions, skewing towards younger and BAME viewers. Like London, West Midlands has a higher BAME population, which can explain the BBC's lower reach compared to other regions.

In line with the overall decline for BBC television's reach since 2010-11, reach fell in each of the English regions. The steepest declines were in the West of England (a fall of nearly five percentage points), the North East, Midlands West and Midlands East (all around four percentage points).

**Figure 18: Weekly reach of BBC television by English Region**

English region	2013-14 (2010-11)
South West	<b>84.5</b> (85.0)
South East	<b>83.3</b> (84.4)
North	<b>82.1</b> (85.1)
West	<b>81.9</b> (86.9)
East	<b>81.9</b> (84.2)
North East	<b>81.7</b> (85.8)
South	<b>81.3</b> (84.8)
North West	<b>81.0</b> (83.4)
Midlands East	<b>80.4</b> (84.2)
Midlands West	<b>79.3</b> (83.4)
London	<b>76.5</b> (79.5)

## (2)The quality and distinctiveness of BBC television

This section presents performance data that measures the quality and distinctiveness of BBC One, BBC Two, BBC Three and BBC Four including by genre on the channel.

As an important aspect of distinctiveness, we also consider the range and variety of programmes on the main channel BBC One at peak time between 7pm and 9pm, between 9pm and 10pm, and daytime. We analyse this by looking at the proportion of coverage given to the top 10 programmes by annual output between 7pm and 9pm and by looking at average AI and fresh and new scores at 9pm and AI scores across daytime.

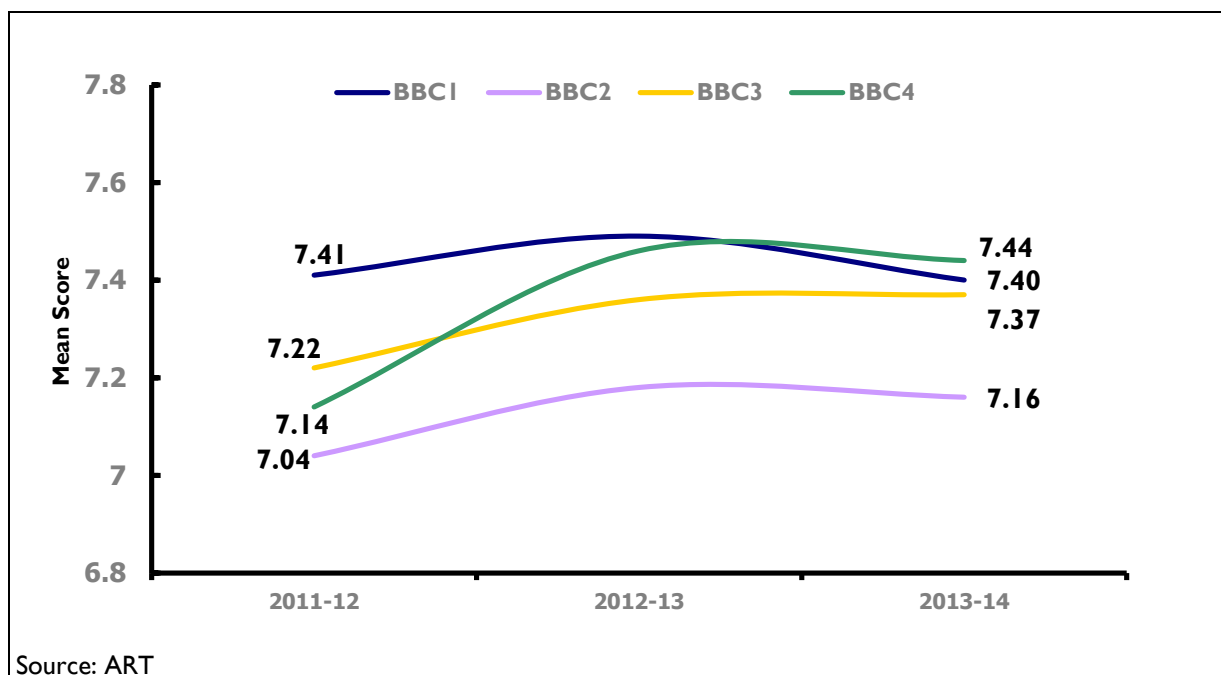
We use the following metrics:

- General impression scores – the score out of 10 given by viewers of the channel from the last seven days.
- Audience appreciation index – a score out of 100 used as an indicator of the viewer's appreciation for a programme.
- Average 'fresh and new' scores - the percentage of people that strongly agree a programme is fresh and new.

### 2.1 Audience 'general impression' scores of the BBC channels

BBC Four had the highest average general impression score in 2013-14, having had a much lower score in 2011-12. The mean score for BBC Four rose from 7.14 to 7.44. BBC Two (7.16) and BBC Three (7.37) experienced marginal growth over the three years while BBC One's score was virtually unchanged at 7.40.

**Figure 19: Mean general impression scores**

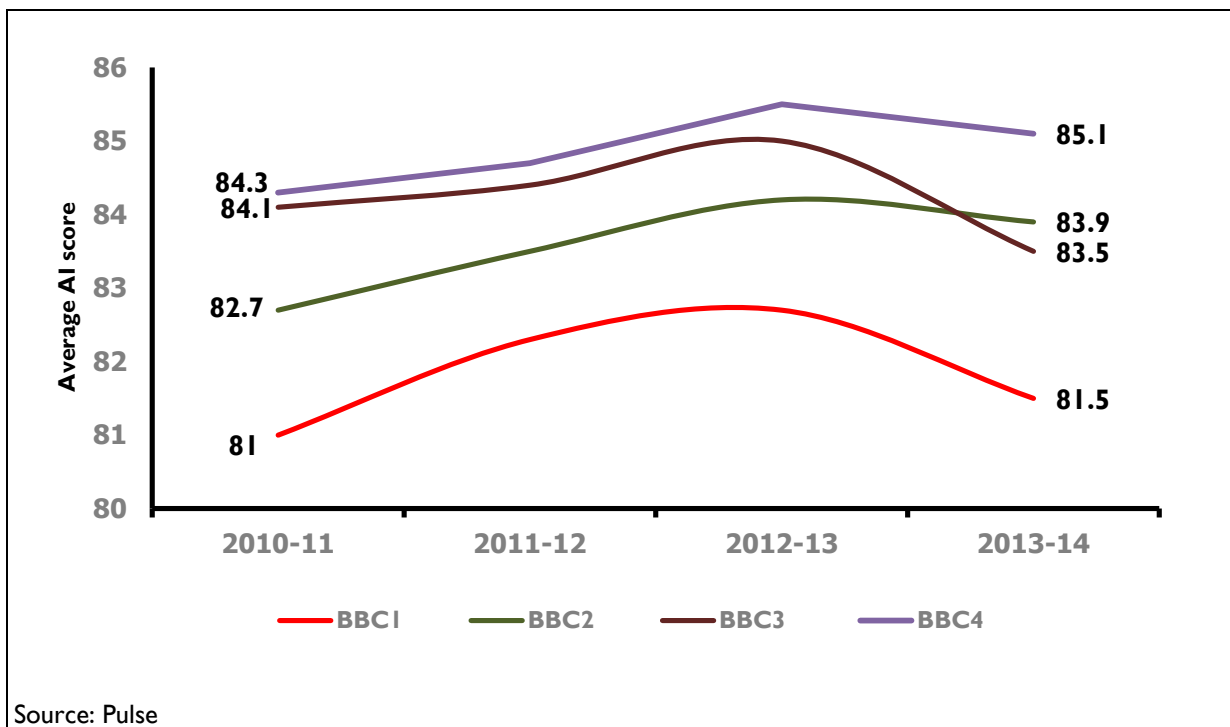


## 2.2 Average audience appreciation index (AI) for BBC channels

The average AI score for BBC Two increased from 82.7 to 83.9, the highest increase from all the BBC channels. BBC One also experienced a three year increase, with the AI score rising from 81.0 to 81.5.

The average AI score for BBC Three amongst 16-34s had a minor decline between 2010-11 and 2013-14, with the AI score falling from 84.1 to 83.5. The average AI score for BBC Four rose from 84.3 to 85.1.

Figure 20: Average AI scores by channel. BBC Three 16-34



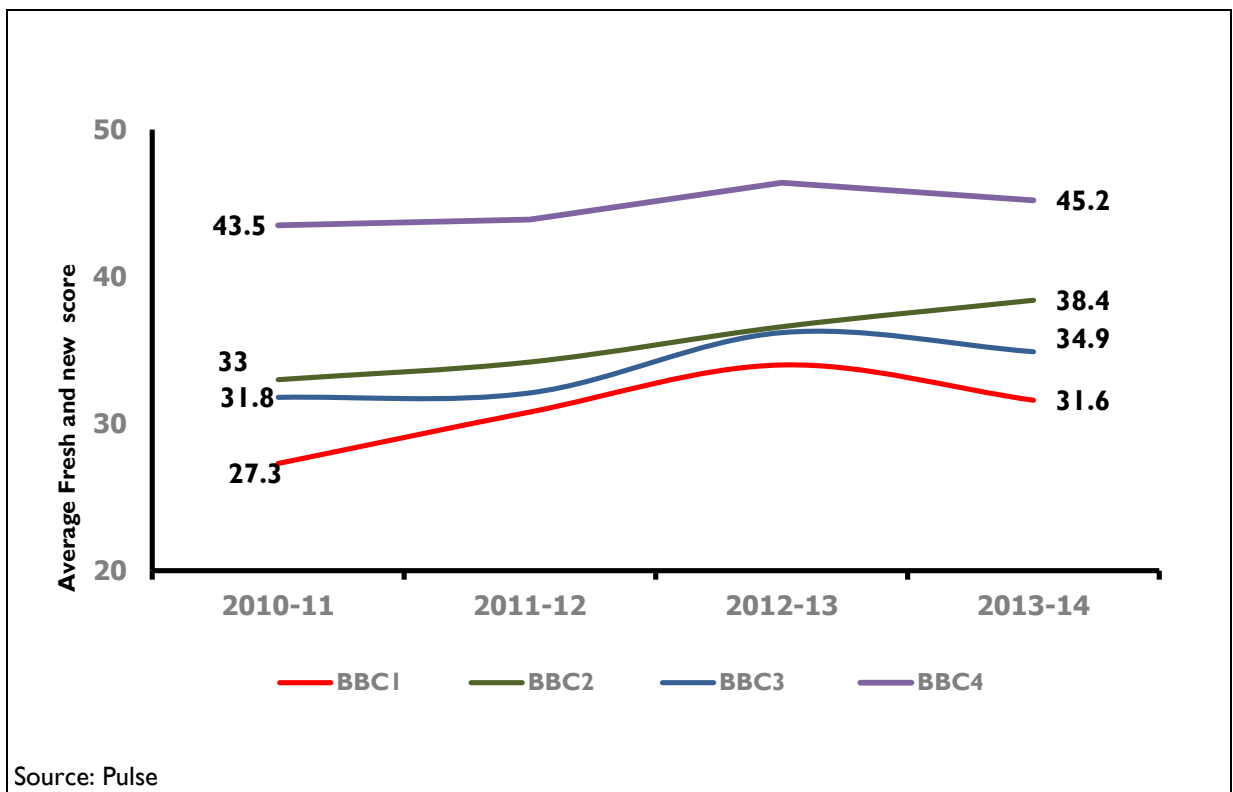
## 2.3 Average fresh and new scores for BBC channels

BBC Two had the largest increase to its average fresh and new scores for programmes between 2010-11 and 2013-14, although BBC Four still has the highest average score. BBC Two's average fresh and new score rose from 33.0 to 38.4, BBC One also experienced a similar increase albeit from a lower base, with its score increasing from 27.3 to 31.6. BBC One also had a large increase, from 27.3 in 2010-11 to 31.6 in 2013-14.

BBC Three's average fresh and new score increased from 31.8 to 34.9. BBC Four had a smaller rise in average fresh and score, albeit from a high starting point. The average score increased from 43.5 in 2010-11 to 45.2 in 2013-14.

All the channels apart from BBC Two experienced some year on year decline in their fresh and new scores in 2013-14.

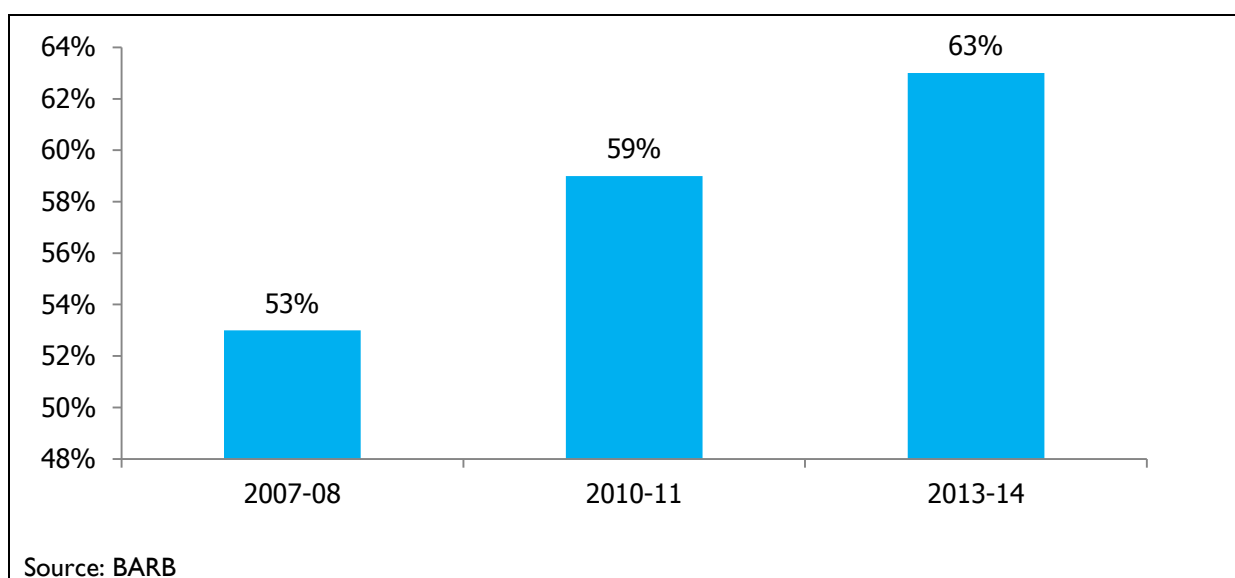
Figure 21: Fresh and new scores by channel. BBC Three 16-34



## 2.4 BBC One reliance on top programmes pre watershed

Findings from our qualitative audience research showed there were wide perceptions of BBC One being over reliant on familiar titles and tending to ‘play it safe’ with programming and scheduling. We explored this area in more detail through an analysis of the main channel’s schedule every three years since 2007-08. Between 7pm and 9pm, BBC One has become increasingly more reliant on its top programmes, with 63% of the 2013-14 pre watershed schedule made up of BBC One’s top 10 programmes. In 2007-08, the top 10 programmes made up 53% of the peak time schedule.

**Figure 22: 7-9pm BBC One Top 10 programmes as % of coverage**



The table below shows the top BBC One pre-watershed (7pm-9pm) programmes by the percentage of airtime they take up in 2007-08. It shows the top 10 programmes making up 53% of overall airtime. *EastEnders* and *The One Show* make up almost a quarter of all pre-watershed airtime. Nine of the ten programmes shown below are still regularly broadcast today, with *My Family* the only series to have ended. *Match of the Day* makes the top ten due to broadcasting live international football matches.

**Figure 23: BBC One top programmes, ranked by % of airtime 7-9pm, 2007-08**

Rank	Programme	% airtime	Launch year
1	Eastenders	15%	1985
2	The One Show	12%	2007
3	Holby City	7%	1999
4	Waterloo Road	3%	2006
5	Antiques Roadshow	3%	1979
6	Panorama	3%	1953
7	Casualty	3%	1986
8	My Family	2%	2000

9	Watchdog	2%	1980
10	Match of The Day	2%	1964

Below is the same table for 2010-11, showing an increase in proportion of airtime of the top 10 programmes, rising to 59% from 53% in 2007-08. By this stage *The One Show* is broadcast with greater regularity and has a greater proportion of airtime than *EastEnders*. The top five programmes now make up 44% of 7-9pm airtime, compared to 40% in 2010-11.

**Figure 24: BBC One top programmes, ranked by % of airtime 7-9pm, 2010-11**

Rank	Programme	% airtime	Launch year
1	The One Show	15%	2007
2	Eastenders	14%	1985
3	Holby City	7%	1999
4	Antiques Roadshow	4%	1979
5	Waterloo Road	4%	2006
6	Casualty	4%	1986
7	Countryfile	4%	1988
8	Panorama	3%	1953
9	Watchdog	2%	1980
10	QI	2%	2003

The final BBC One table looks at 2013-14 and shows increased airtime for the top 10 programmes. The top 10 programmes now account for 63% of pre watershed airtime with the top 5 programmes making up just below half of all pre watershed airtime (49%). The introduction of *The Voice* in 2012 and increased airtime of *Countryfile* between 7pm and 9pm has led to a different set of programmes in the top five. *The One Show*, *EastEnders* and *Holby City* continue to make up the top three programmes by airtime.

**Figure 25: BBC One top programmes, ranked by % of airtime 7-9pm, 2013-14**

Rank	Programme	% airtime	Launch year
1	The One Show	18%	2007
2	Eastenders	14%	1985
3	Holby City	7%	1999
4	The Voice UK	5%	2012
5	Countryfile	5%	1988
6	Waterloo Road	4%	2006
7	Antiques Roadshow	4%	1979
8	Panorama	2%	1953

9	Watchdog	2%	1980
10	A Question Of Sport	2%	1968

## 2.5 The quality of daytime programmes

The average AI score has increased for BBC One throughout its daytime schedule, particularly in the afternoon. The average AI score for BBC One daytime has now risen to 81.5.

BBC One's average AI score has increased in the morning and afternoon. The average AI score of 81.5 is around a point greater than the average AI score from 2010-11. BBC One is given a higher average AI score by adults aged 55 or over compared to adults aged 16-34.

**Figure 26: BBC One average AI score by daytime day-parts**

Daypart	2010-11	2013-14
0915-1300	80.1	80.2
1500-1800	80.4	82.3
<b>0915-1800</b>	<b>80.6</b>	<b>81.5</b>

Source: Pulse

The average daytime AI score has also increased for BBC Two. The average score between 9:15 and 18:00 increased from 82.0 to 82.4 between 2010-11 and 2013-14.

There was a greater increase in the morning, with the average AI score rising by over a point from 80.6 to 81.7.

**Figure 27: BBC Two average AI score by daytime day-parts**

Daypart	2010-11	2013-14
0915-1300	80.6	81.7
1500-1800	82.3	82.6
<b>0915-1800</b>	<b>82.0</b>	<b>82.4</b>

Source: Pulse



### (3)The cost-effectiveness of BBC television

This section presents the performance data that the BBC uses to help inform an assessment of the cost-effectiveness of the BBC television channels.

We refer to a measure called **cost per viewer hour**, which draws on cost and usage data to arrive at the average cost for every hour that an individual watches a channel.

#### 3.1. Spending on programming by the BBC television channels

The total spend on content on each of the BBC television channels from 2010-11 to 2013-14 is shown below. Each channel's spending has remained within the 10 per cent parameter around its service licence budget, beyond which BBC Management would need to ask for the Trust's approval.

The variation between each channel's spend is determined by a number of factors, including the level of original programming, the genre mix and range of programming particularly in drama and factual output, the amount of news on the channel, and spend on sports rights. Changes in genre spend are also often due to cyclical factors, including the timing of sporting and cultural events such as the Olympics and the Queen's Diamond Jubilee in 2012 which primarily affected BBC One's overall spend in 2012-13, or changes in the way divisions are allocated money.

**Figure 28: Content spend on each channel, 2010-11 to 2013-14**

		<b>2010-11</b> <b>(£ million)</b>	<b>2011-12</b> <b>(£ million)</b>	<b>2012-13</b> <b>(£ million)</b>	<b>2013-14</b> <b>(£ million)</b>
<b>BBC One</b>	Originations from BBC television	457	466	445	472
Note 1	Other originations (eg. news, sport)	599	501	611	493
	Acquisitions, repeats	58	58	58	49
Note 2	Programme-related costs	16	16	16	15
	<b>Total content spend</b>	<b>1,130</b>	<b>1,041</b>	<b>1,130</b>	<b>1,029</b>
<b>BBC Two</b>	Originations from BBC television	202	202	201	187
Note 1	Other originations (eg. news, sport)	186	183	180	186
	Acquisitions, repeats	31	31	23	27
Note 2	Programme-related costs	2	1	1	2
	<b>Total content spend</b>	<b>421</b>	<b>417</b>	<b>405</b>	<b>402</b>

<b>BBC Three</b>	Originations from BBC television	60	59	60	51
Note 1	Other originations (eg. news, sport)	17	17	23	22
	Acquisitions, repeats	6	8	7	8
Note 2	Programme-related costs	1	-	-	-
	<b>Total content spend</b>	<b>84</b>	<b>84</b>	<b>90</b>	<b>81</b>
<b>BBC Four</b>	Originations from BBC television	35	33	33	32
Note 1	Other originations (eg. news, sport)	10	13	13	14
	Acquisitions, repeats	3	3	3	3
Note 2	Programme-related costs	1	1	1	1
	<b>Total content spend</b>	<b>49</b>	<b>50</b>	<b>50</b>	<b>50</b>

Source: BBC Television

Note 1: This is expenditure on programmes that are broadcast on the channel but the budgets are held by divisions other than BBC Television, such as News, Sports, and Nations and Regions opt-out programmes

Note 2: Other costs directly related to programme making include programme development

### 3.2. Cost per viewer hour

While BBC One is reaching fewer people year on year, its cost per viewer hour (CPvH) has decreased primarily as a result of less money being spent on sports events compared with 2012-13 as well as lower cost programmes replacing children's programmes that stopped airing on the BBC One and BBC Two in January 2013.

BBC Two's CPvH has increased over the period due primarily the channel reaching fewer people.

BBC Three's CPvH has been relatively static with some decline in 2012-13 as more people watched the channel that year. Coverage of the 2012 Olympics on the channel is a likely contributory factor to the increase in reach.

Since 2012-13, BBC Four's CPvH has decreased significantly due to the channel reaching more people in the last two years.

**Figure 29: Cost per viewer hour of BBC One, BBC Two, BBC Three and BBC Four, 2010-11 – 2013-14**

Cost per viewer hour (pence)				
	2010-11	2011-12	2012-13	2013-14
BBC One	6.4	6.1	6.2	6.0
BBC Two	7.4	7.8	8.3	8.2
BBC Three	7.0	7.0	6.6	6.9
BBC Four	9.8	9.5	6.8	6.7

Source: BBC Television