
Media Nations 2020

Annex 1: Methodologies

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Research survey methodologies

Ofcom Technology Tracker

The Technology Tracker is a face-to-face in-home CAPI survey run once a year (January-February) with around 3,900 adults. It provides us with continuous understanding of consumer attitudes and behaviour in the UK communications markets (fixed and mobile telecoms, internet, multichannel TV, on-demand services, and radio/audio), helping us to monitor change and assess the degree and success of market competition.

The data collected are weighted to the profile of UK adults, so the data are representative of adults aged 16+. The data are initially weighted to correct the over-representation of nations, regions and areas to produce a geographically representative sample. They are then weighted by age, gender, social class, working status, and region to match the known population profile.

Ofcom PSB Tracker

The PSB Tracker is conducted using a mixed methodology with online and CAPI face-to-face data collection. The sample was split 50% online / 50% face-to-face. A total of 3,130 interviews were conducted in 2019 (2,188 in England; 313 in Scotland; 310 in Wales; 319 in Northern Ireland).

Sample sizes for the devolved nations are higher than required to be UK representative, in order to allow robust reporting at nation level. Fieldwork for the 2019 PSB Tracker was undertaken in two waves: May and June 2019 and October-November 2019. Quotas were applied to ensure that each fieldwork method delivered a sample representative of the UK. The data collected from these two sources were combined to provide the final results for 2019.

The PSB Tracker provides Ofcom with continuous understanding of UK adults' overall satisfaction with PSB channels, and their opinions on the importance and delivery of a range of purposes and characteristics. The data collected is initially weighted to the profile of the UK adults, so the data are representative of adults aged 16+.

Ofcom podcast research

The podcast research was a survey conducted by Populus in March 2020. Using their online panel, 1,157 respondents aged 18+ who listen to podcasts each week were recruited.

They completed a questionnaire on their behaviours and attitudes related to podcasts and also completed a seven-day diary on podcasts they had listened to each day.

The questionnaire and data tables are available under 'other documents', published alongside the Media Nations report.

Ofcom Covid-19 Media Behaviours survey

The Covid-19 Media Behaviours Survey was a set of four bespoke online surveys that used TRP Surveys UK panel. Respondents are aged 16 and over and distributed to reflect the latest census by age, gender, social grade and region (sample size: approximately 2,000). Fieldwork was 15 May – 5 July 2020. The surveys captured the audiovisual and audio activities and attitudes of online adults. Where we have extrapolated the figures from the survey to provide population estimates, we have used the unweighted base at the 95% confidence level.

Ofcom Covid-19 news and information: consumption and attitudes research 2020

The Covid-19 news and information survey was a weekly quantitative omnibus interview of 2,000 UK adults aged 16+ via an online panel. Populus' online panel consists of 185,000 UK adults and is the primary source of the sample. Invitations to complete the survey are sent out to a national representative online sample of UK adults 16+. The first weekend's fieldwork took place between 27-29 March 2020.

Quotas are set on age, gender, region and social grade, with the data weighted to the known profile of the UK using age, gender, government office region, social grade, taken a foreign holiday in the last three years, tenure, number of cars in the household and working status. Targets for quotas and weights are taken from the National Readership Survey, a random probability face-to-face survey conducted annually with 34,000 adults.

There are data tables for each week of research and a rolling average set covering four weeks of research, which can be found [on Ofcom's website](#). Please note that some responses were not in the questionnaire for the full four weeks of research.

The data has provided Ofcom with a continuous understanding of how UK adults are getting news and information about the coronavirus pandemic.

Comscore

Comscore is an organisation that provides online audience measurement. It is endorsed by UKOM, the body with a mandate from the advertising industry to establish measurement standards for digital media. Comscore uses its unified digital measurement methodology which combines both panel and census measurement techniques to obtain fully unified digital audience measurement statistics.

Kids Insights UK

Kids Insights UK is a market research and insights resource on attitudes, behavioral and consumption pattern of children aged 3-18 years old. More than 21,300 children a year in the UK take part in the survey.

TouchPoints

TouchPoints is an annual survey commissioned by the Institute of Practitioners in Advertising. With a sample of approximately 6,000 adults 15+ across Great Britain, it uses a seven-day diary to capture media consumption and other daily activities every half hour. In addition, it also uses a self-completion questionnaire which includes attitudinal statements.

RAJAR

Radio Joint Audience Research (RAJAR) is the official body in charge of measuring radio audiences in the UK and is owned and controlled by the industry. The overall adult 15+ sample is about 100,000 each year, with each respondent participating for one week.

TV output and spend analysis

PSB channels

Wherever possible, historical data have been provided for BBC One, BBC Two, ITV, ITV Breakfast, Channel 4, Channel 5 and the BBC's portfolio channels: BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. BBC HD and BBC One HD have been excluded from the analysis in the report, as much of their output is simulcast from the core BBC channels and therefore would represent a disproportionate amount of duplicated broadcast hours and spend. Please refer to individual footnotes and chart details indicating when a smaller group of these channels is being reported on.

ITV includes ITV Breakfast unless otherwise stated. Note: GMTV became Daybreak during 2010 and then Good Morning Britain in 2014; the data relating to both services are labelled ITV Breakfast in the output and spend analysis. Data for the PSB channels are provided to Ofcom by the PSBs as part of their annual returns.

BBC portfolio figures include BBC Three until it ceased broadcasting as a linear channel on 15 February 2016.

The nations reports look at content broadcast across the national variants of BBC One and BBC Two, as well as the holders of the Channel 3 licenses in each nation. In addition, the Scotland report contains analysis on BBC ALBA while the Wales report contains data on S4C's provision.

Commercial PSB portfolio channels and online services

Despite not being designated PSB channels, we also provide information on content broadcast across the commercial PSB portfolio channels and their online services. The commercial PSB channels in 2019 were:

- **ITV:** ITV2, ITV3, ITV4, CITV, ITVBe and ITV Encore
- **Channel 4:** E4, More4, Film4, 4Seven, 4 Music, Box Hits, Box Upfront, Kerrang!, Kiss, Magic and The Box
- **Channel 5:** 5USA, 5*, 5Select, 5Spike and Paramount Network

From 2017, we have also included first-run UK-originated content made available exclusively on BBC iPlayer, ITV Hub, All4 and My5.

From 2019, 4 Music, Box Hits, Box Upfront, Kerrang!, Kiss, Magic and The Box are included as part of Channel 4's portfolio following its full acquisition of The Box Plus Network.

Spend data

Programme spend represents the total cost of production or acquisition, including rights costs but excluding third-party investment. In the case of commissions, it represents the price paid to the independent producer (and therefore includes a mark-up on production costs).

The data and information expressed in this report have been adjusted for inflation. It is important to adjust for inflation when comparing nominal data at different points in time because with inflation, increases in nominal figures may simply reflect higher prices rather than increased production or purchasing power. For example, if a book cost £5 ten years ago, but £10 today, we would say its price has risen 100% in nominal terms. But had inflation risen by 100% at the same time, halving the value of money, we would say that the price had not moved in real terms.

Trend data showing programme costs over a number of years are given in 2019 prices (i.e. taking account of inflation, using the Consumer Price Index, as provided by the National Statistics Office).

All spend and output data are based on programmes broadcast in each calendar year, e.g. 2019 data reflect programmes broadcast during 2019.

Output hours

Definition of peak time

The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three (until it ceased broadcasting as a linear channel) and BBC Four, peak time runs from 7pm (when broadcasting starts on these channels) to midnight, except where otherwise stated.

Definition of slot time versus running time

Output hours are either based on slot time or running time. Slot time includes advertisements, sponsorship breaks and promos whereas running time excludes these minutes from programme output hours analysis. The PSB channels provide their data in slot times with the exception of nations' and regions' output, where running times are provided.

Genre definitions

The output data provided by the broadcasters follow a set of programme genre definitions, as outlined below and agreed with broadcasters in 2006.¹ Please note that these genres are defined for our monitoring and reporting purposes, and do not necessarily correspond to definitions used in broadcasting legislation, such as the Audio Visual Media Services Directive.

Outlined below are the definitions used for the output and spend data in this report:

News

- Newscast or news bulletin providing national, international or regional news coverage.
- News magazines which may contain a range of items related to news stories, with comment and elements of general interest.
- Coverage of parliamentary proceedings and political coverage.
- Weather forecasts and bulletins, including reports on air quality, tide times etc.

¹ Prior to 2006 'drama and soaps' and 'entertainment and comedy' were combined.

Current Affairs

- A programme that contains explanation and analysis of current events and issues, including material dealing with political or industrial controversy or with public policy.
- Topical programmes about business matters and financial issues of current interest.
- Political debates, ministerial statements, party conferences.

Arts & Classical Music

- A programme displaying or presenting a cultural or artistic performance or event.
- Programmes providing information, comment or critical appraisal of the arts.
- The subject matter can cover theatre, opera, music, dance, cinema, visual arts, photography, architecture and literature.

Religion & Ethics

- All forms of programming whose focus is religious belief, for example: programmes intended to provide religious inspiration through words and/or music, and informational programmes explaining doctrine, belief, faith, tenets, religious experiences or topics providing a religious world view.
- Coverage of religious acts of worship of all faiths.
- Life experience: moral, ethical, spiritual – exploring one or more of the following issues at some point in the programme: (i) a recognisable religious perspective forming a significant part of the overall narrative; (ii) an exploration of people's daily lives whose attitudes could be said to be informed by a religious background or tradition; (iii) an exploration of people's perception of, and attitudes to, philosophies which address the big questions of life that affect them. These must demonstrate an approach that bears in mind a religious faith/belief context.

Education

- Programmes with a clear educational purpose, usually backed by specially prepared literature publicised on screen and in other appropriate ways. Includes programmes for Schools, BBC Learning Zone and Open University programmes.
- Programmes reflecting social needs and promoting individual or community action. Also includes Campaign weeks on particular subjects, e.g. bullying, drugs.

Factual

All types of factual programmes, included in the genres listed below.

Specialist Factual

- History – programmes about historical times or events, including programmes about archaeology
- Nature & Wildlife – natural history and programmes about environmental issues.

- Science & Technology – programmes about scientific issues, new discoveries, medical matters and new technological developments
- Business & Finance – programmes about business/financial issues and developments

General Factual

- General factual programmes, including consumer affairs.
- Lifestyle programmes, hobbies and leisure interests, including makeover shows.
- Daytime magazine programmes and talk shows
- Coverage of special events, not generated by the broadcaster, including commemorative events, royal events.

Factual Entertainment

- Popular factual material, including reality shows, docu-soaps and other Factual Entertainment.

Drama

- All drama including comedy drama and TV movies but excluding soaps which are classified separately.
- Docu-drama – based on reality, telling the story of actual events.

Soaps

- Drama programmes with a continuous storyline and fixed cast, normally with more than one episode each week and shown every week of the year and usually (but not necessarily) of 30 minutes duration.

Films

- All feature films that have had a prior theatrical release including films commissioned by the broadcaster.

Entertainment

- All forms of entertainment programme, including panel games, chat & variety shows, talent contests
- Quiz and game shows
- Pop music video shows
- Contemporary music – coverage of popular music events and performances, such as OB concerts or as-live studio-based shows.

Comedy

- All forms of scripted comedy, satire, stand-up, and sketch shows
- Situation comedy – dramatised entertainment in a humorous style, usually with a fixed cast and generally of 30 minutes' duration.

Sport

- All forms of sports programming, including coverage of sporting events.

Children's

- All types of programmes designed for a children's audience, including:
 - Drama;
 - Entertainment shows, including weekend magazines and animations and cartoons, including puppets which are designed for a children's audience;
 - General information programmes and news for children; and
 - Education and factual programmes for pre-school children.

Definitions

- **First-run UK originations** – Programmes commissioned by or for a licensed public service channel with a view to their first showing on television in the United Kingdom in the reference year.
- **Network/ non-network programming** – Network programming is shown by the PSB channels across the UK, whereas non-network programming is nations' and regions' programming that is shown only in specific areas of the UK.
- **Daytime** – 6.00am-6.00pm
- **Peak time** – 6.00pm-10.30pm. For BBC Three and BBC Four, peak time runs from 7.00pm to midnight.

TV and AV consumption analysis

Total AV consumption

This analysis uses industry measures wherever possible to enable future tracking. The approach is constantly under review to reflect the latest data available as measurement capability advances. There are currently four main inputs:

1. **BARB industry data:** this provides total TV screen time and sub-components for live television, time-shifted television up to 28 days, DVD usage, games console playing, non-linear broadcaster output and all other TV usage.
2. **BARB four screen measurement:** this is the total online minutes to broadcaster online players to PCs, tablets and smartphones. It is based on census data that are generated by software code embedded in TV Player apps.
3. **TouchPoints:** this provides device profiling data only for subscription on-demand and broadcaster on-demand usage, as well as a ratio of YouTube to other online video content and a split of BARB time-shift between recorded content and broadcaster on-demand on the TV set. There are no absolute numbers from TouchPoints included in the analysis.
4. **Comscore:** this provides video viewing data from PCs, tablets and smartphones for YouTube.

Other points:

- BARB has previously estimated that extended PVR playback provides around 1.3% of additional TV in PVR homes. This viewing has been added to recorded viewing from the available pool of unmatched viewing.
- Categories excluded from this analysis are cinema viewing and consumption of billboard and outdoor advertising video.

TV viewing figures – BARB

The data are provided by the Broadcasters' Audience Research Board (BARB), a nationally representative panel of approximately 5,300 homes across the UK providing the official broadcast TV measurement for the industry.

Analysis is based on viewing to scheduled TV, such as programmes listed in TV listings magazines or on electronic programme guides (EPG), on TV sets. Unless otherwise stated, figures quoted are for the standard seven-day consolidated viewing. This includes viewing of these programmes at the time of broadcast (live) and from recordings such as on DVRs and through catch-up player services (e.g. apps on smart TVs) up to seven days after first broadcast (known as time-shifted viewing). Viewing of broadcast TV through all devices attached to the TV set including computers, streaming devices, and set-up boxes are included. Most figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency. It is clearly stated in the report when other age breakdowns have been used.

As well as the industry standard consolidated viewing described above, the report also includes BARB analysis of total TV screen time that includes several measures that are not currently part of

the standard reporting. This includes time-shifted viewing up to 28 days after broadcast and a category of 'unmatched viewing'. Unmatched viewing is to broadcast content beyond 28 day. This includes everything when the TV is in use, but content cannot be audio-matched or otherwise identified. It includes gaming, viewing of DVDs/box sets/archives, SVoD, time-shifted viewing beyond 28 days, apps on smart TVs and navigating EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded. Unmatched viewing has been reported by BARB since July 2013.

The BARB analysis focuses on the changes to viewing of broadcast TV overall and the performance of the PSB channels and their portfolio of channels.

The viewing metrics used in the analysis are hours/minutes of viewing, average weekly reach as a proportion of the total universe, channel share and channel profile.

Changes to the BARB reporting system in 2010 allow broadcasters to retrospectively amend the genre labelling of broadcasts they have aired. These changes will apply to all historic data for respective programmes/films. As a result of this, genre analysis within the Power Bi report is based on a snapshot of data at a given point in time (i.e. when analysis was conducted). All analysis is based on data generated between January 2010-June 2020.

BARB analysis has been taken from the AdvantEdge TV analysis software. Data presented in our other historical reports prior to 2018, such as the PSB Annual Research Report or the Communications Market Report 2017 was extracted from a different TV analysis tool, InfoSys+. There may be minor differences compared to previously presented analysis.

Definitions

Average daily minutes – average viewing time spent watching TV per person, per day.

Audience share/share of viewing – the percentage of the total TV audience watching a channel, time slot or programme across an analysis period. For example, a share of 22% for a given channel would mean that of all viewers watching TV across the period, 22% watched the channel and the remaining 78% were watching other channels. On a programme basis, a 48% share would mean that of all the viewers watching television in the slot that the programme was being transmitted, 48% were watching the programme.

Average weekly reach – the percentage of the total TV population who watched any TV or a channel in a typical week. Data can also be expressed in 000s. There are various ways of defining the amount of viewing an individual must have done in order to be counted as having been reached. The BARB definition is for this to be at least three consecutive minutes while Ofcom defines this to be at least 15 consecutive minutes, unless otherwise stated.

Audience profile – the audience profile shows how a main audience category is divided into its subcategories (such as age or socio-economic group) in percentage terms. For example, if a programme achieves an Adult 16-34 profile of 10%, this means that 10% of adult viewers were aged 16-34, while the other 90% were 35+ Adults.

Average audience – a programme audience is the average of all the minute audiences covered by the programme transmission, excluding any commercial breaks and promotions.

All PSBs – All PSBs include the main five PSB channels- BBC One, BBC Two, ITV (which includes ITV, STV, UTV and ITV Cymru Wales), Channel 4 and Channel 5 (excluding their +1 channels) as well as all BBC portfolio channels excluding BBC Alba (as this is not measured by BARB). S4C is not included as it is measured on a different base but it is reported on in our Wales Nation report.

Other third-party sources

AdvertiseCast

Advertising Association / WARC Expenditure Report

Advertising Association (AA)

Ampere Analysis

British Film Institute (BFI)

British Phonographic Industry (BPI)

BVA BDRC

Competition Markets Authority (CMA) Online platforms and digital advertising market study

Digital Audio Exchange (DAX) / MTM

Enders Analysis

Entertainment Retailers Association (ERA)

Official Charts Company

GfK SVoD Tracker

Group M

Internet Advertising Bureau (IAB UK)

Oliver & Ohlbaum

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