

# Analysis of current promotional activity on television

## A report of the key findings of a content analysis study

**Research study conducted by The Communications  
Research Group on behalf of Ofcom for the purposes  
of its review of the cross promotion rules**

**6 December 2005**

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## Section 1

# Executive summary

- As part of Ofcom's Review of the cross promotion rules this piece of research was commissioned to:
  - quantify the amount of promotional activity currently taking place across a selection of television channels
  - understand the split between self and cross promotional activity
  - understand in detail the type of self and cross-promotion taking place
- Over the analysis period, which consisted of 7 days output across each of the 14 channels<sup>1</sup> in the sample, 1,526 hours of output were recorded. In total 9,685 promotional spots were logged and analysed.
- Overall the PSB channels aired fewer promotional spots than Sky One and Discovery. The highest number of spots was on Sky One (1,299), accounting for 13% of the total sample – this may be due to the relatively larger portfolio of Sky channels. BBC1 (566) and BBC2 (438) transmitted fewer spots than ITV1 (776) and Channel 4 (710).
- As part of the analysis, the length of promotional spots was also recorded. The average length of a promotion across the sample was 20.8 seconds. Sky One transmitted the longest promotions at an average length of 26.4 seconds.
- Promotional activity across all the channels in the sample accounted for an average of 3.7% of total output – with the terrestrial channels ranging from 2.2% (BBC2) – 3.2% (ITV1). Promotions accounted for above-average proportions of output on E4 (5.5%), Sky One (7.6%) and Discovery (4.9%).
- Overall, the majority of spots (47%) were transmitted during the centre-break of a programme. The trend was driven by the non-terrestrial channels. Promotional activity on the terrestrial channels tended to take place during the end-breaks (after the end of a programme). The greater volume of promotional activity recorded on the commercial channels compared with BBC channels can in part be explained by the fact these channels have a greater opportunity to promote during programme centre breaks – which do not feature in BBC programmes.
- Across all the spots analysed, the majority (52%) were positioned at the start of the break (centre or end break). This was skewed by the BBC channels - all BBC spots are classified as being positioned at the start of the break as there is no advertising in between the breaks. Based on the activity recorded on the commercial channels only (i.e. excluding BBC promotions), 47% of spots were positioned at the start and 45% at the end – the remaining 8% were positioned in the programme credits.

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<sup>1</sup> Channels analysed: BBC1, BBC2, BBC3, BBC4, ITV1, ITV2, ITV3, Channel 4, E4, Sky One, Sky Sports 1, Sky Sports 2, Sky Sports 3, The Discovery Channel.

- 63% of all spots analysed were self promotion spots and a third were cross promotional. However, there are some stark differences across the various channels;
  - BBC, Sky and Discovery all aired more cross promotional spots than ITV and Channel 4.
  - Around a third of promotions on BBC1, BBC2, Sky One and Discovery were cross promotional compared with 5% on ITV and 11% on Channel 4.
  - Cross promotion accounted for well over half of the promotional activity on Sky Sports channels.
- The majority of self promotion messages consisted of building awareness of upcoming events (another day) and more actionable reminders (later today).
- The majority of cross promotion messages were for other television channels or programmes on other channels (75.9%). The most marked differences were on Channel 4, E4 and the non-terrestrial BBC channels which featured proportionately more web-site and support material promotions.

## Section 2

# Research objectives & methodology

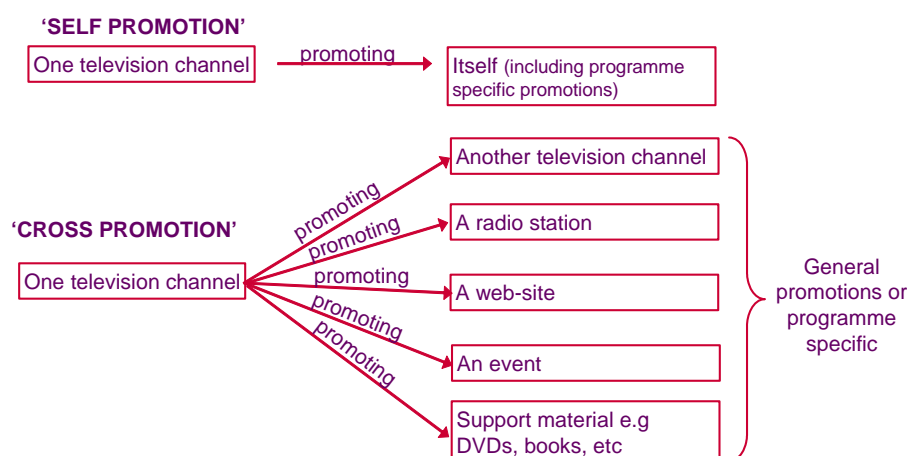
## Background & Objectives

As part of Ofcom's Review of the cross promotion rules this piece of research was commissioned to:

- quantify the amount of promotional activity currently taking place across a selection of television channels
- understand the split between self and cross promotional activity
- understand in detail the type of self and cross-promotion taking place

The definition of promotion used throughout the study has been summarized below:

**Figure 1: Definition of promotion**



## Methodology

The industry standard measurement for television viewing is provided by BARB (Broadcasters' Audience Research Board). BARB measures television programming and commercial advertising activity – but does not cover promotional activity.

Therefore, in order to understand the level and type of activity currently taking place during promotional airtime, Ofcom commissioned independent research agency The Communications Research Group (CRG) to conduct a piece of content analysis.

Content analysis involves recording and analysing output on channels to register specific details of on-screen activity. All the analysis conducted by CRG and reported on throughout this report is based on promotional activity during programme end-credits and commercial breaks – activity during programmes was not recorded.

The analysis was based on a sample of activity across a range of channels. This sample was collected as a composite week spread over several weeks between

January-March 2005 such that for each channel, wherever possible, each day of the week was recorded in a different week.

The sample consisted of the following channels:

**Figure 2: Content Analysis sample details**

<b>Broadcaster</b>	<b>Channel</b>	<b>Dayparts</b>	<b>Total hours (over 7 day analysis period)</b>
<b>BBC</b>	BBC1	0600-2400	126
	BBC2	0600-2400	126
	BBC3	1900-2400	35
	BBC4	1900-2400	35
<b>ITV</b>	ITV1	0600-2400	126
	ITV2	0600-2400	126
	ITV3	0600-2400	126
<b>Channel 4</b>	Channel 4	0600-2400	126
	E4	1400-2400	70
<b>Sky</b>	Sky One	0600-2400	126
	Sky Sports 1	0600-2400	126
	Sky Sports 2	0600-2400	126
	Sky Sports 3	0600-2400	126
<b>Discovery</b>	The Discovery Channel	0600-2400	126
<b>TOTAL</b>			<b>1,526 hours</b>

During the analysis the following information was collected by channel:

- Date, time and duration of promotions
- Location of promotion – Centre break, end break or programme credits
- Position of promotion – Start of break, end of break or programme credits
- Type of promotion – Self promotion, cross promotion or combination (where a promotion consists of multiple messages)
- Promotional details including those summarised in Figure 1.

Throughout this report, promotional activity is referred to as 'spots' – where such a spot includes the promotion of more than one item these items are referred to as 'messages'.

The sample structure formulated covers a range of channels over a period of time with over 1,500 hours of output analysed. In analysing the data presented in this report it is key to note that the study provides a snap-shot of activity at any given point – there may be variations in activity, which may for example be seasonal or associated with a particular programme, event or channel launch during the year.

As well as using the definition outlined in Figure 1 the following criteria was used in defining promotions in this analysis.

- We measured both visual and voiceover promotions
- Idents were not included
- Promotions within programmes were not included
- End credit promotions were included. End- credit promotions refer to those that take place at the end of the programme while the programme credits are being shown.

## Section 3

# Overview of current activity

Over the analysis period, which consisted of 7 days output across each of the 14 channels in the sample, 1,526 hours of output were recorded. In total 9,685 promotional spots were logged and analysed (Figure 3).

Overall the PSB channels aired fewer promotional spots than Sky One and Discovery. The highest number of spots was on Sky One (1,299), accounting for 13% of the total sample – this may be due to the relatively larger portfolio of Sky channels which could be cross promoted on Sky One. BBC1 (566) and BBC2 (438) transmitted fewer spots than ITV1 (776) and Channel 4 (710).

There was noticeably less activity on BBC3 (194) and BBC4 (165) than the main terrestrial BBC channels, although it is key to note these channels were only analysed between 19:00-24:00 each day due to transmission times. Figure 4 illustrates the average number of spots per hour – figures for the four BBC channels show the number of promotions range from 3.5 (BBC2) to 5.5 (BBC3) per hour.

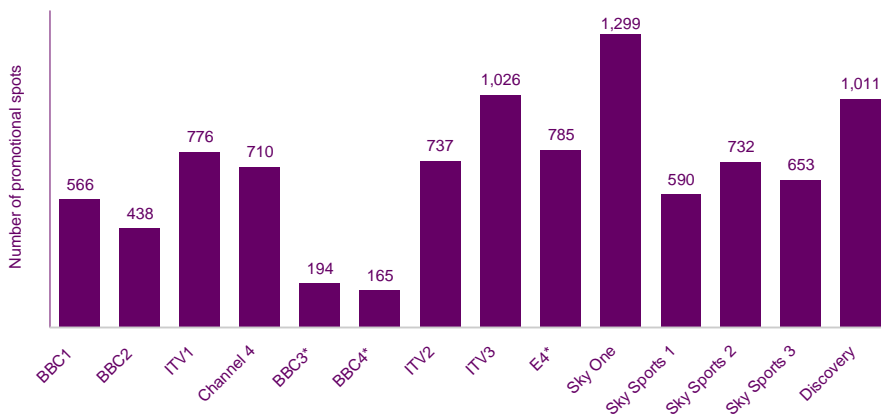
1,026 spots were logged on ITV3 – this was higher than the other ITV channels and may be a reflection of the recent launch of the station.

Although broadcasting for fewer hours, activity on E4 (analysis based on transmissions between 14:00-24:00) was higher than Channel 4 (785 spots compared with 710 spots). Data for activity per hour highlights this difference – there were on average 5.6 promotional spots on Channel 4 and 11.2 on E4 per hour.

Activity on the Sky Sports channels ranged from 590 spots on Sky Sports 1 to 732 spots on Sky Sports 2 over the analysis period.

**Figure 3**

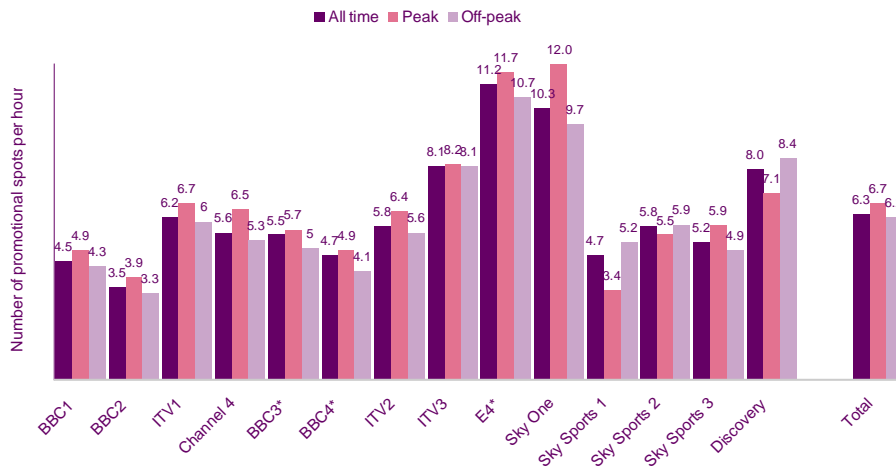
### Total number of promotional spots



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.

**Figure 4**

**Total number of promotional spots per hour**

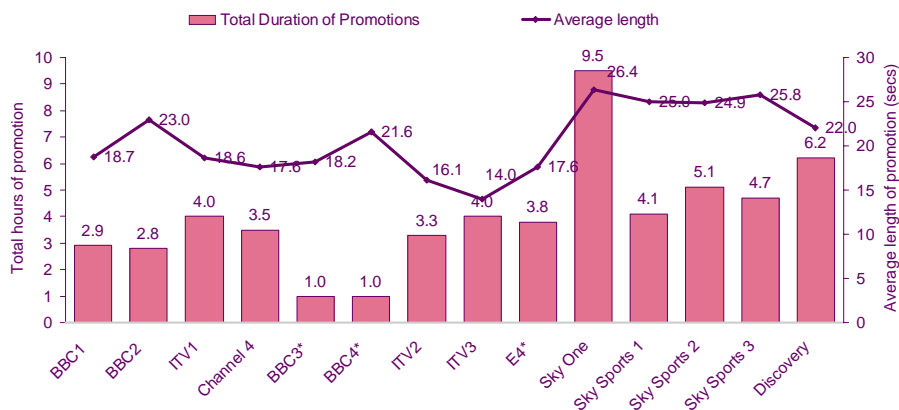


Source: CRG/Ofcom. \* Channels broadcasting for fewer hours. Peak = 1800-2230

Figure 4 also illustrates the difference in activity during peak-time (18:00-22:30) and during off-peak. The figures suggest there was a marginal increase in peak-time activity – although across many of the channels there was no significant difference. The most marked increase in peak-time activity was recorded on Sky One (12.0 spots per hour during peak, compared with 9.7 spots per hour during off-peak). The reverse is noted on the Sky Sports channels and Discovery where promotional activity decreased during peak-time.

**Figure 5**

**Total hours of promotion & average length of promotional spots**



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.

As part of the analysis, the length of promotional spots was also recorded. The results of this are shown in Figure 5 which illustrates the total duration of promotions on each channel (hours) and the average length of each spot (seconds).

We have already seen that the greatest volume of spots was recorded on Sky One (figure 3) – the chart above suggests the channel also transmitted the longest promotions. The average length of a promotion on Sky One was 26.4 seconds,

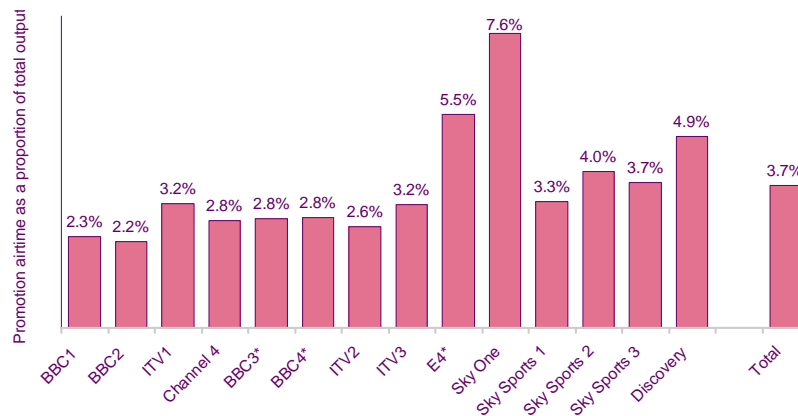


compared with the average figure across the sample of 20.8 seconds. Promotions on Sky Sports ranged between 24.9-25.8 seconds.

Comparison of the terrestrial channels shows that although the number of spots logged on ITV1 and Channel 4 were higher than the BBC channels, spots on BBC (particularly BBC2) were marginally longer.

**Figure 6**

**Promotional airtime as a proportion of total output**



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.

The total duration of promotional activity was considered in the context of the total broadcast hours analysed (Figure 6). Promotional activity across all the channels in the sample accounted for an average of 3.7% of total output – with the terrestrial channels ranging from 2.2% (BBC2) – 3.2% (ITV1).

Promotions accounted for above-average proportions of output on E4 (5.5%), Sky One (7.6%) and Discovery (4.9%). As Figure 3 showed, E4 and Channel 4 transmitted a similar volume of spots – the above-average figure for promotions as a proportion of total output on E4 is explained by the fact that E4 transmits for fewer hours.

Similarly, although the non-terrestrial BBC channels transmitted fewer spots than BBC1 and BBC2, promotional activity accounted for a similar proportion of output across all BBC channels as the non-terrestrial channels broadcast for fewer hours.

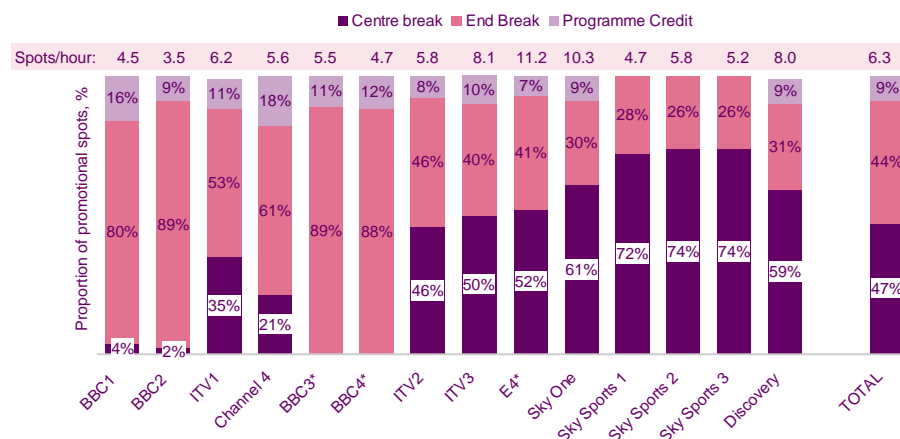
## Section 4

# Positioning of Promotions

As part of the study, the location and positioning of spots was also recorded. The results of this analysis are summarised in Figures 7 and 8.

**Figure 7**

### Location of promotional spot



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.  
Centre Break on BBC1 & 2 refers to break during BBC Breakfast News

Overall, the majority of spots (47%) were transmitted during the centre-break of a programme. The trend was driven by the non-terrestrial channels.

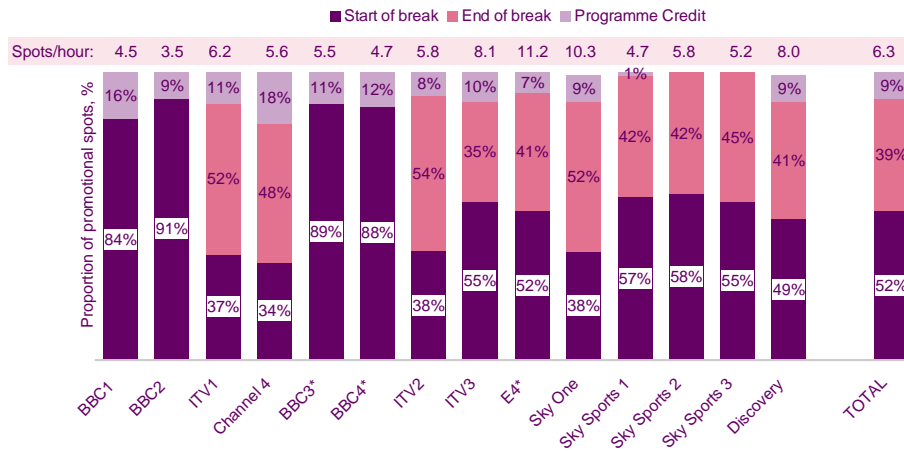
Centre-break promotions accounted for 35% of activity on ITV1 and 21% on Channel 4. In comparison such activity accounted for over 60% of promotions on channels such as Sky One (61%) and the Sky Sports channels (average 73%).

Promotional activity on the terrestrial channels tended to take place during the end-breaks (after the end of a programme). The greater volume of promotional activity recorded on the commercial channels compared with BBC channels (Figure 3) can in part be explained by the fact these channels have a greater opportunity to promote during programme centre breaks – which do not feature in between BBC programmes.

Programme credit promotions accounted for 9% of all promotions logged. This figure rose to 16% on BBC1 and 18% on Channel 4.

**Figure 8**

**Location of promotional spot in commercial break**



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.

Note: BBC spots are only classified as 'Start of break' as there is no advertising activity in between the breaks

Across all the spots analysed, the majority (52%) were positioned at the start of the break (centre or end break) – this may suggest broadcasters are attempting to build inheritance and capture audience attention at the end of a programme/programme segment when many viewers may be considering their viewing schedule. This was skewed by the BBC channels - all BBC spots are classified as being positioned at the start of the break as there is no advertising in between the breaks. Based on the activity recorded on the commercial channels only (i.e. excluding BBC promotions), 47% of spots were positioned at the start and 45% at the end – the remaining 8% were positioned in the programme credits.

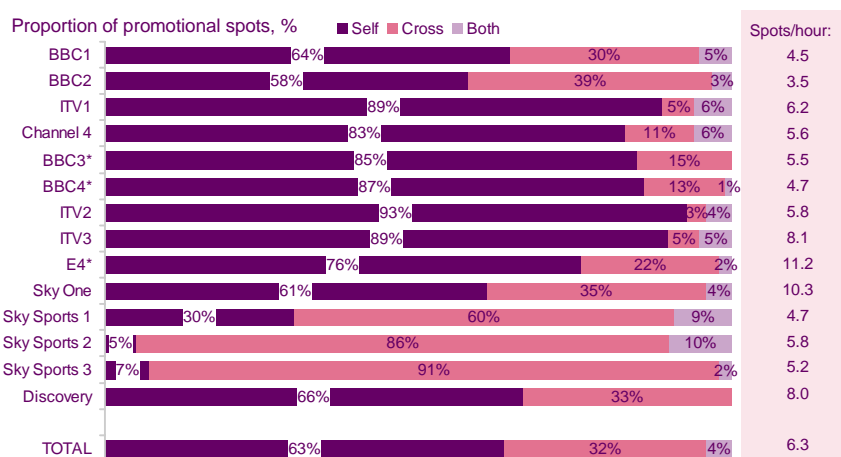
## Section 5

# Self promotion versus cross promotion

As the definition of promotion (Figure 1) suggests, a wide range of promotional activity may take place on a channel. The analysis sought to understand the split between self promotion (where a channel promotes itself) and cross promotion (where a channel promotes another channel or service). With the introduction of multichannel television, cross promotional activity is possible across a wider range of channels as one broadcaster operates more than one station. As well as channel promotions, cross promotion also includes the promotion of web-sites, radio stations, events and support material.

**Figure 9**

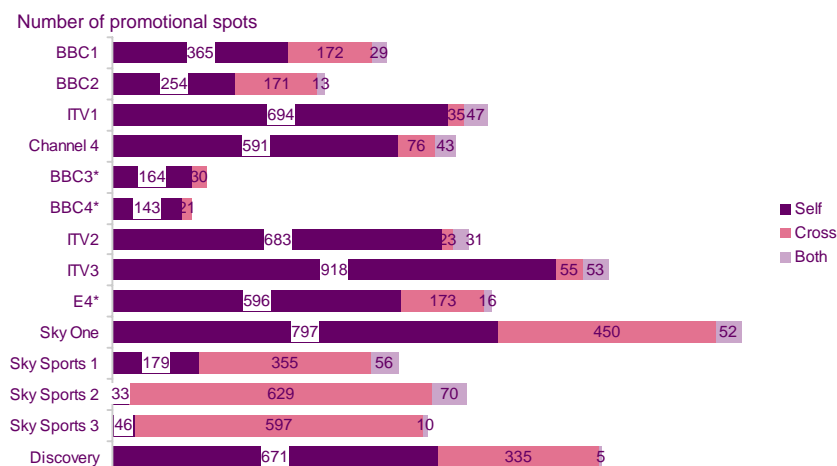
### Type of promotional spot - Share



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.

**Figure 10**

### Type of promotional spot - Volume



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.

As Figure 9 shows, just over 60% of all spots analysed were self promotion spots and a third were cross promotional (some spots include multiple messages and have been classified as ‘both’). However, there are some stark differences across the various channels.

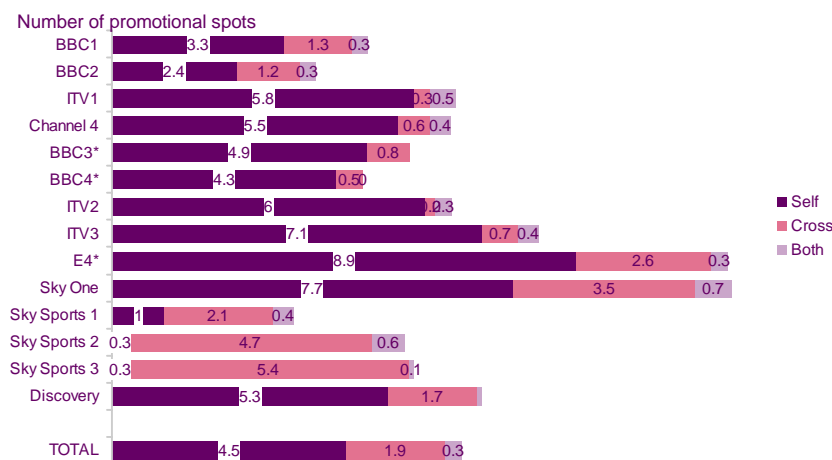
BBC, Sky and Discovery all aired more cross promotional spots than ITV and Channel 4. Around a third of promotions on BBC1, BBC2, Sky One and Discovery were cross promotional compared with 5% on ITV and 11% on Channel 4. This trend may be driven by the number of relevant interests within the broadcaster’s portfolio – for example, Channel 4 can cross promote E4, whereas BBC1 can cross promote 5 other television channels and a range of radio stations.

Compared with channels such as ITV1 which follow relatively set schedules, the more variable schedules on Sky Sports channels which may be due to the nature of the programming (e.g. details of participants in a particular match may be unknown until the results of a preceding match) as well as the synergies between the various channels, may lead to a greater level of cross promotional activity taking place across this suite of channels.

Figure 10 displays the activity details in volume terms.

**Figure 11**

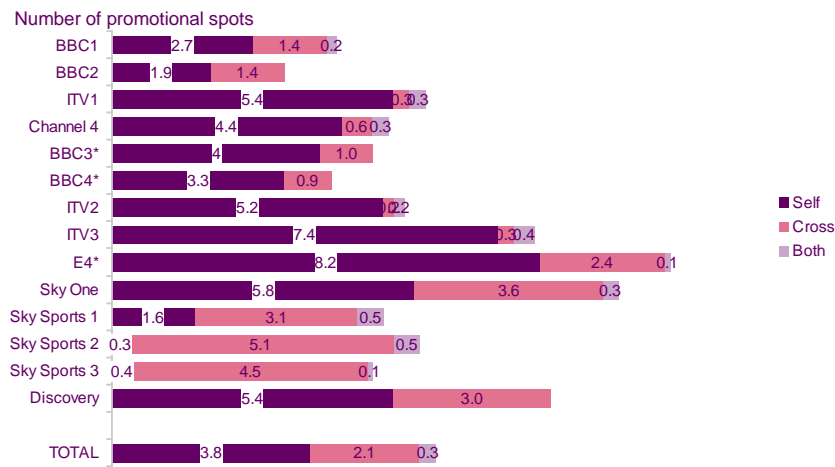
**Type of promotional spot: Spots per hour during peak-time**



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours. Peak = 1800-2230

**Figure 12**

**Type of promotional spot: Spots per hour during off-peak**



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.

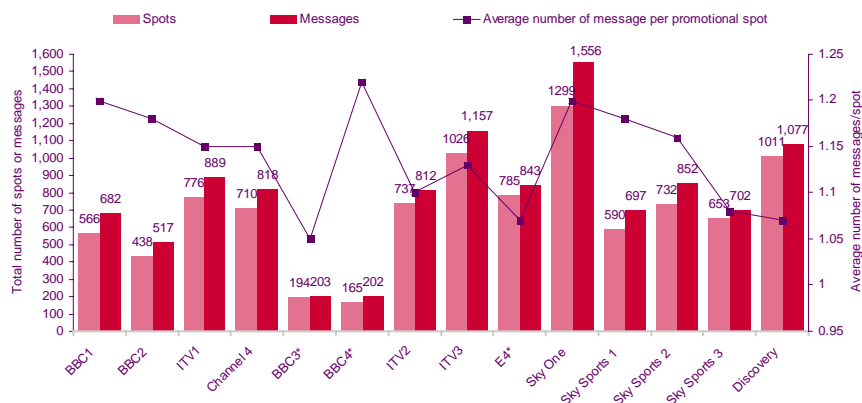
Figures 11 and 12 illustrate the breakdown of promotional activity during peak and off-peak dayparts. Across the sample, 4.5 self promotion spots, 1.9 cross promotion spots and 0.3 spots featuring both self and cross promotion messages were aired each hour during peak-time. The highest number of self promotions spot were featured on E4 (8.9 per hour) and highest number of cross promotions were broadcast on Sky Sports 3 (5.4 per hour).

The number of self promotions per hour fell to 3.8/hour during off-peak – again, with the highest number aired on E4.

On the terrestrial channels, almost twice as many self promotion spots were logged on ITV1 and Channel 4 compared with BBC1 and BBC2. The number of cross promotion spots on the two BBC channels averaged just over 1 per hour, noticeably more than the commercial terrestrial channels.

**Figure 13**

**Comparison of promotional spots and messages**



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.  
 Number of messages is greater than number of spots due to multiple promotions in a spot

The number of individual messages within each promotion was also logged during the output analysis. This highlighted the fact that many promotional spots feature more than one message. Figure 13 above illustrates the number of spots and messages recorded on each channel along with a measure for the average number of messages per spot.

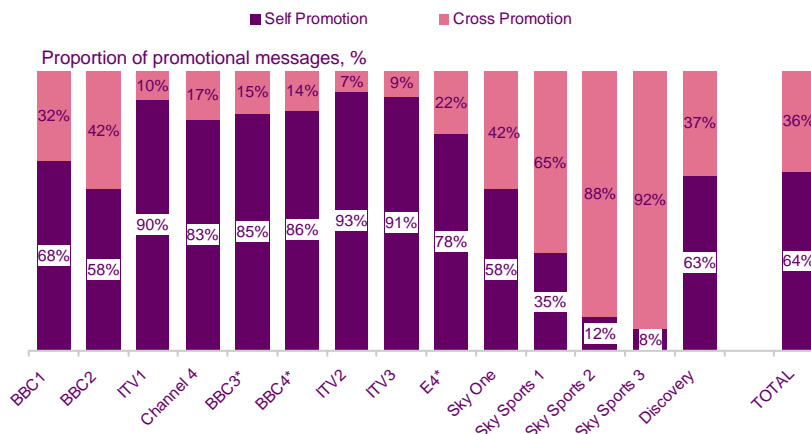
With 1,299 spots logged over the analysis period, Sky One aired the most promotions – this figure rose to 1,556 messages. The average number of messages across the whole sample was 1.14 per spot – with a range of results from 1.05 per spot on BBC3 to 1.22 per spot on BBC4. Comparison of the activity across the four terrestrial channels shows that BBC1/2 aired fewer spots than ITV1 and Channel 4, although these were generally longer spots and there was a marginally greater number of messages per spot on BBC (BBC1 = 1.20, BBC2 = 1.18) than ITV1 & Channel 4 (1.15 messages/spot).

The messages logged were classified as either self or cross promotion – the breakdown is presented in Figures 14 and 15. Across the sample, 64% of messages were self promotional and 36% were cross promotional.

The terrestrial BBC channels aired over 200 cross promotion messages each, accounting for 32% of BBC1 messages and 42% of BBC2 messages. ITV1 (85 messages) and Channel 4 (136 messages) featured around half the volume of cross promotion messages as BBC.

**Figure 14**

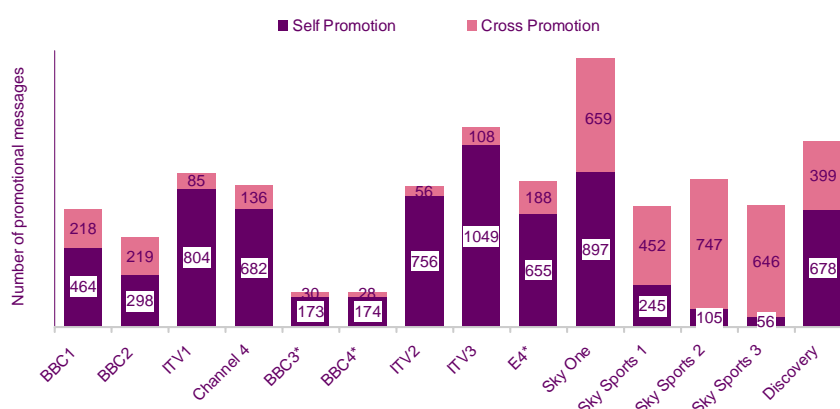
### Types of promotional messages - Share



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.

Figure 15

## Types of promotional messages - Volume



Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.  
Number of messages is greater than number of spots due to multiple promotions in a spot

These messages were further dissected to look at the type of self and cross promotion featured.

Figure 16 provides a detailed classification of the self promotional messages. The classifications used were as follows:

- **Another day** – Programme(s) is promoted which is to be transmitted in the future with specific date and time details given.
- **Genre** – Promotion of a genre on a particular channel e.g. Drama on Channel A.
- **Later Today** - Programme(s) is promoted which is to be transmitted later the same day.
- **Non-specific time** - Programme(s) is promoted which is to be transmitted in the future with no specific date or time details given.
- **Now** - Programme(s) is promoted which is to be transmitted next. This will not include the announcement immediately prior to the start of the programme.
- **Same channel** – This is a more generic promotion for the channel, but these figures do not include idents.

The majority of self promotion messages consisted of building awareness of upcoming events (another day) and more actionable reminders (later today).

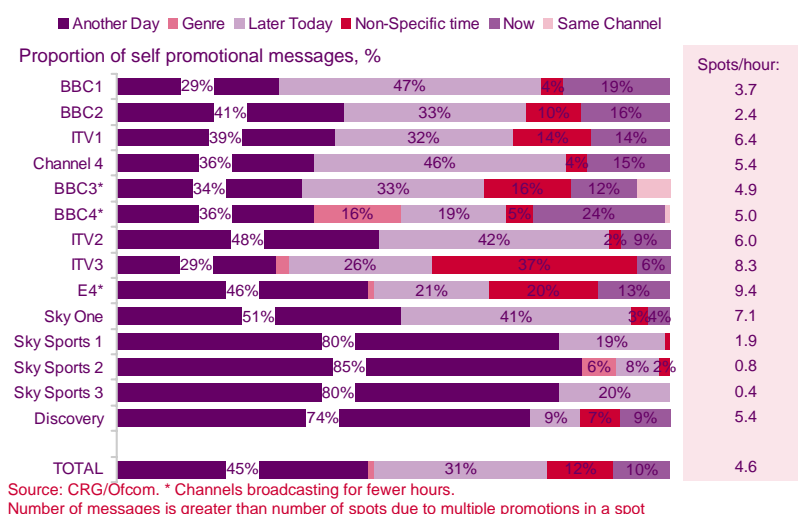
As discussed earlier in the report, possibly due to the variable nature of the programme schedule, a higher level of promotions for programmes on another day was recorded across the Sky Sports channels.

Almost 40% of all the self promotional messages on ITV3 promoted items without giving any specific time. This may be related to the fact that the channel had recently launched and therefore there may be a need to build general awareness of the channel offering amongst new viewers.



**Figure 16**

### Type of self promotion activity



Detailed information on the cross promotional activity was logged and summarised into the following classifications:

- **Event** – any event promoted by the channel e.g. music festival or concert
- **Genre** – a general promotion of a specific genre on another channel e.g. movies on Channel B.
- **Interactive facility** – where viewers are directed to the interactive facility for further information, etc.
- **Radio** – the promotion of a radio station linked to the broadcaster. This may include the general promotion of the station or a specific programme.
- **Support Material** – the promotion of support material linked to channel output including DVDs, books and help lines.
- **TV** – the promotion of another channel or programmes on another channel.
- **Website** - where viewers are led to the online facility for further information, etc.

The majority of messages were for other television channels or programmes on other channels (75.9% - Figure 17). The most marked differences were on Channel 4, E4 and the non-terrestrial BBC channels which feature proportionately more web-site and support material promotions.

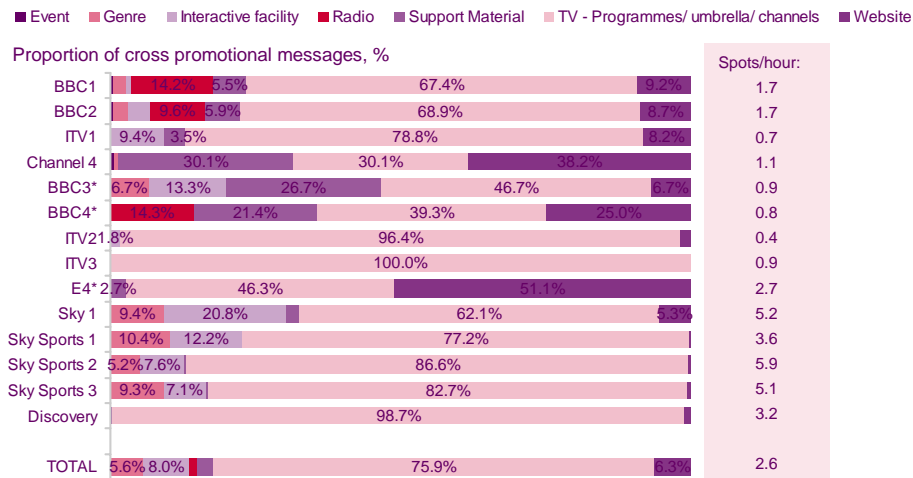
Genre promotions accounted for 5-10% of cross promotions on the Sky channels – this may be linked to the broadcaster’s portfolio which features niche channels such as Sky Movies and Sky Sports.

Promotion of radio channels/promotions was logged on the BBC channels, representing 14.2% of BBC1 messages, 9.6% of BBC2 messages and 14.3% of BBC4 cross promotional activity.

Earlier analysis has shown that the terrestrial BBC channels transmitted more cross promotion messages than the commercial terrestrial channels – the results shown in Figure 17 also suggest the BBC channels carried a more diverse range of cross promotional messages than ITV1 and Channel 4.

**Figure 17**

**Type of cross promotion activity**



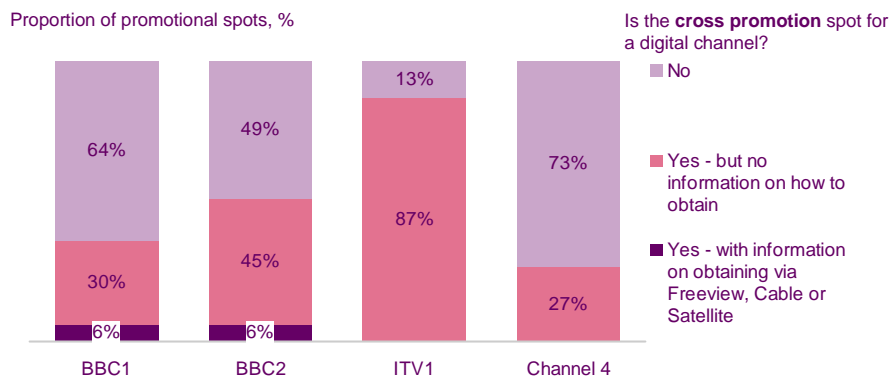
Source: CRG/Ofcom. \* Channels broadcasting for fewer hours.  
 Number of messages is greater than number of spots due to multiple promotions in a spot

As part of the analysis of cross promotion spots on the terrestrial channels, details on whether the promotion was for a digital channel (including digital radio stations) and whether details were provided as to the platform via which the channel could be received were also recorded. Figure 18 summarises the findings.

On BBC1, 36% of cross promotions were for a digital channel/station – and in the majority of cases there was no information given on the delivery platforms. A similar trend is seen across all the terrestrial channels.

**Figure 18**

**Promotion of digital channels & platforms**



Source: CRG/Ofcom.  
 Note: Based on all Cross Promotion spots. 'No' includes promotions for support material, websites, etc