
Ofcom Public Service Media (PSM) tracking research

Confirmation of proposed survey changes for 2021 and beyond

Overview

Response Summary

In January 2021 we published a notification of changes document which set out our planned changes to the tracker and invited comments on our plans. The table below outlines a summary of the range of issues raised by stakeholders, and our responses.

Issue Raised	Our Response
Inclusion of audio services, radio and podcasts.	Our focus in this study is on the television, BVoD and SVoD environments. We will continue to monitor the changes in the use of audio services and will consider where it best fits into our research programme in light of the DCMS Radio and Audio Review. BBC Radio services are currently covered within Ofcom's BBC Performance Tracker.
The need to be careful about the comparisons between content platforms and content services; for example, comparing BBC One to Sky, rather than Sky One, or comparing ITV to YouTube. In a similar vein, the misattribution of content was also raised as an issue.	Because audiences consume content from a variety of services and platforms, it is crucial the survey reflects the marketplace in which choices are made in order to understand that the role played by PSB today. However, we agree that vertical integration, misattribution and the complexity of the market are all challenging issues which are difficult to unpack into simple and discrete survey sections. Misattribution in particular would be very challenging to address in this survey, as we do not collect programme level data. These are important points and will be considered thoroughly during the design of the questionnaire.
Including questions to identify lapsed SVoD and Pay-TV consumers, or those who have never paid for these services.	Being able to fully assess the types of platforms and services that consumers are using and understand the particular value they have is an important aim for this survey, and we will consider how to do so when designing the questionnaire.
The relevance of including non-PSB providers, and assessing attributes what audiences value about non-PSB providers	We know from our recent qualitative research for the PSB Review that non-PSB providers do deliver PSB-like attributes and audiences

	recognise this when asked. Investigating what benefits audiences feel they get from non-PSB services will be an important part of the jigsaw puzzle.
Concerns that our re-naming and re-designing of the survey was premature, given that the PSB Review has not concluded.	Audiences access audio-visual content through a wide variety of non-broadcast services, and as our study aims to be more inclusive of these services, we wanted to ensure the name of it was incorporating this.
Ensuring the PSB attributes we use are fit for purpose.	The core aim is to use language that makes sense to respondents so they can answer the survey as accurately as possible. The list of attributes has yet to be finalised which we will do so after extensive cognitive testing and piloting.
Concerns about changing the method used to measure the importance of PSB in order to better establish priorities.	We will be looking at alternative question techniques to the 1-10 ratings we have used to date as we want a better understanding of peoples' priorities. The current thinking is that a ranking of attributes would be the best option, given our learnings from the PSB Review Quantitative research. However, we will agree the technique with the commissioned agency and take on board their recommendations as well.
Concerns about profiling low, lapsed and non PSB users in a more comprehensive manner.	One of the aims of the survey is to gather a more complete picture of the marketplace; therefore it is valuable that we try to identify these groups and monitor their size and composition over time.
Concerns about the loss of longitudinal data.	Whilst we ordinarily seek to preserve longitudinal data, it is necessary to update the survey to ensure that it is relevant and meaningful in representing how people consumer content in an ever-expanding marketplace. The changes we make should improve our ability to assess PSB effectively and improve our ability to respond to future changes in the market. We accept the loss of comparability with previous years, and consider that the advantages of our planned changes by

	far outweigh the disadvantages of keeping the status quo.
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We are now in the process of procuring and commissioning an agency to conduct this research.

If you have any queries please email market.research@ofcom.org.uk.

Original Consultation Content

Overview

During 2020, Ofcom suspended the Public Service Broadcasting (PSB) tracking survey for the year. We said at the time that we intended to re-design and recommission a new audience tracking survey in 2021 and in its place for 2020, we would use the extensive range of quantitative and qualitative ad-hoc research that explores peoples' relationship with PSB, as part of our PSB review, [*Small Screen: Big Debate*](#).

This document sets out our plans for the new tracker beginning Spring 2021¹. It details survey design changes that have been developed through our learnings from the PSB Review research – which has offered us detailed insights into audiences' relationship with PSB, including their use of PSB content and its relevance to them, the role and value of PSB in their lives and what they consider to be valuable going forward.

The planned changes are designed to improve the survey structure and content. This will result in data that is more reflective of peoples' opinions and more sensitive to changes in attitudes over time. The survey's overall objectives of measuring public opinion towards how well the PSB is delivered and how important this is to UK audiences, remain at its core.

Additionally, we set out our plans for changes in fieldwork, given the Covid-19 pandemic's impact on face-to-face interviewing.

In the future the survey will be called the Public Service Media (PSM) tracker.

What we are proposing in brief:

Extending the range of people surveyed to include low, lapsed and non PSB users

- Given the changing nature of the UK audio-visual marketplace and the decline in viewing rates to broadcast TV, particularly among younger audiences, we are planning to identify and profile low, lapsed and non PSB users. This will enable us to monitor changes in the size and composition of these audience segments.

Reviewing the consumption questions to ensure we have a more detailed understanding of the use of media services

- We will also expand the consumption section of the survey to include usage of online services to ensure we have total market coverage. This will enable us to understand more fully what services low, lapsed and non PSB users are using and what PSB features these services are providing.

Extending the scope of the survey to include a new section on non PSB providers

¹ Subject to confirmation

- Given the changing marketplace, we plan to extend the scope of the survey to include a new section on how well people consider other major content providers (e.g. Sky, Amazon Video, Netflix, YouTube) offer content with PSB-like attributes.

Changing the way PSB is described to survey participants to improve comprehension

- We revised the list of ‘purposes’ and ‘characteristics’ used in the previous tracking study to a combined list of PSB attributes in the recent PSB review qualitative and quantitative research. This list will be reviewed and further refined through piloting as part of the new survey set up.
- We also plan to add in a description of PSM to help aid understanding and improve the quality of responses. The previous survey did not explicitly describe PSB but sought to evaluate its importance and delivery through rating the purposes and characteristics.

Changing the method used to measure the importance of PSB in order to better establish priorities

- We plan to stop asking about importance of each PSB ‘purpose’ and ‘characteristic’ using a 1-10 rating scale and instead ask respondents which attributes (from the revised list) they value for themselves and which they value for society. In order to gain a better understanding of differentiation between attributes, we will ask agencies to recommend question techniques for creating prioritisation between attributes.

Changing the fieldwork methodology given the Covid-19 pandemic

- Due to the ongoing situation surrounding the Covid-19 pandemic and current guidelines that are in place, Ofcom made the decision to suspend all face-to-face fieldwork across all consumer research projects in 2020 to protect the safety of everyone involved. This is likely to continue into 2021. Closer to the time of fieldwork, we will consider which methodology is best placed to ensure the welfare of all involved whilst continuing to ensure that we can capture the views of all audiences including those offline.

Specific questions for removal

- We are planning to stop asking some questions, as we do not believe they are useful in their current form. This includes PSB satisfaction compared to a year ago, devices used to watch different types of content and use of PSB websites, and opinions of bbc.co.uk and channel4.com.
- We may also change or remove some of the demographic questions.

Background

Small Screen: Big Debate

Over the last year Ofcom has been conducting its PSB Review, *Small Screen: Big Debate*. Part of this has include an extensive programme of research in which we asked viewers and listeners from across the UK to tell us about their use of PSB content, its role and relevance in their lives, and how that might change in the future. The range of research included:

- Quantitative research- conducted in [March 2020](#) and [September 2020](#)
- Qualitative research- conducted in [January/February 2020](#) and [July/August 2020](#)
- [Youthsight research](#) – conducted in February 2020 and May 2020

- [External research](#) by London School of Economics- conducted in July/August 2020

We have gained a significant amount of insight from this extensive range of research, not only in terms of audience opinion towards PSB, but also in terms of how to engage in discussions about PSB. This is extremely useful for designing new research.

Some of our key research findings relevant to this review include:

- The use and relevance of PSB varies by generation, with younger people often feeling less connected to PSB, often due to perceptions of low relevance and less brand recognition.
- Whilst the PSB ‘master brands’ have distinct identities, this does not always extend to the individual channel brands outside of the main channels. It is likely that channel identities will continue to erode given the way younger audiences tend seek content over channels.
- Audiences identify a distinct societal role for PSB. Particularly around the provision of trusted and accurate news, programmes that reflect the values and cultures of UK audiences in all their diversity, and programme range.
- When exploring the differences in peoples’ perceptions between PSBs and online services, PSBs are generally seen as being better at offering programming reflective of UK life and values, as well as providing programmes to help people understand what is going on in the world today. However, streaming services are seen as much better in terms of navigating and accessing content.

Rationale for change

Up until 2019, the [PSB tracking survey](#) has remained largely unchanged in structure and content since its inception in 2006. Whilst this has had benefits for longitudinal data collection and the ability to report on changes in attitudes over time, the media landscape has changed substantially and these changes continue to accelerate. It is important that the survey is updated to remain relevant and contextualised in the broader, and today’s more complex media market. These market changes, combined with the learnings from our recent PSB ad-hoc research, mean that it is the right moment to re-design the tracking study in order to ensure it is both relevant now and in the future.

The overall objective of monitoring audience perceptions toward the performance delivery of the PSB system, as well as the individual PSB providers will remain, as will measuring audience perceptions towards the perceived personal and societal value of PSB. However, in some instances, the questions, and the context in which they are asked, will change². We accept that this will lead to a loss of comparability with previous years, but we believe that the advantages of our planned changes by far outweigh the disadvantages of keeping the status quo.

² Please note that any reference to question numbers in this document refer to the [2019 PSB Tracker Questionnaire](#).

Proposed changes to the survey in detail

Extending the range of people surveyed to include low, lapsed and non PSB users

- Given the changing nature of the UK audio-visual marketplace and the decline in viewing rates to broadcast TV, particularly among younger audiences, we are planning to identify and profile low, lapsed and non- PSB users. This will enable us to monitor changes in the size and composition of these audience segments. Additionally, we will ask why these audiences no longer use PSB services/choose not to use PSB services to provide some diagnostics.

Reviewing the consumption questions to ensure we have a more detailed understanding of the full range of media services people are using alongside the PSBs

- We will also expand the consumption section of the survey to include usage of online services to ensure we have total market coverage. This will enable us to understand more fully what services low, lapsed and non PSB users are using and what PSB features other services are seen to be providing.
- We will be collating our consumption questions into a single section. Currently, we ask upfront about linear PSB consumption (Q13 and Q14) in order to route respondents through the survey and include consumption questions about broadcast on demand services and streaming services separately (A3 and A3a). We propose to collate all these questions up front, to build a clear picture of respondent's content consumption.

Extending the scope of the survey to include a new section on non PSB providers

- We currently ask about the use of PSB on-demand services and some streaming services, and how often they are used. In addition, we ask about satisfaction with the PSB's on-demand services (BBC iPlayer, ITV Hub, STV Player [for views in Scotland], All4, My5 and S4C Clic). We will continue to measure use of and satisfaction with these services (Q34 and Q34a) but will incorporate these questions into a larger section on on-demand and streaming services.
- Given the ever-changing marketplace, we plan to extend the scope of the survey to include a new section on how well people consider other major content providers (e.g. Sky, Amazon Prime Video, Netflix, YouTube) offer content with PSB-like attributes. The list will be developed considering market developments to ensure that the survey is futureproof. This would likely include questions on use, how they perform in certain areas, how they compare to the PSB services and how highly they are valued.

Changing the way PSB is described to survey participants to improve comprehension

- We revised the list of ‘purposes’ and ‘characteristics’ used in the previous tracking study to a combined list of PSB attributes in the recent qualitative and quantitative research conducted for the PSB Review.
- Having used these in both a quantitative and a qualitative setting, we are confident that they are easier for respondents to understand and offer a more rounded description of the PSB offering.
- The list below details the range of attributes used across the recent research programme, with some small changes, reflecting how we would like to conceptualise PSM moving forward.

Statement
Services which are available to everyone
High-quality productions
A wide range of programmes made in the UK
A wide range of different types of programmes for me/everyone
A wide range of high-quality programmes for children made in the UK
Trusted and accurate UK news
Provision of regional programmes and content (including news)
High-quality current affairs programming
Reflects the diversity of the UK
Features people like me/us and the places I/everyone know/s
Encourages the development of new talent
Programmes with new ideas and different approaches
Programmes that help me/everyone to understand what is going on in the world today
Programmes that bring the nation together for a shared viewing experience
Programmes that I/everyone can watch with and talk about with my family and friends
Programmes which reflect UK life and values
Programmes that make me/everyone stop and think

- These are not the definitive final statements. The final list will be informed by the outcome of the PSB Review and then further refined through piloting of the new survey.

- We will be continuing to include some statements specifically related to English regions and the nations. These will likely include “it portrays ‘my region’ (Scotland’/‘Wales’/ ‘Northern Ireland’) fairly to the rest of the UK”, “it shows different parts of the UK, including England, Northern Ireland, Scotland and Wales”, and “its programmes show different kinds of cultures within the UK”.
- We will continue to ask users of PSB services how well they consider the PSB channels, both individually and collectively, deliver on the list of PSB attributes (current Q15 and Q16, respectively). This includes BBC One, BBC Two, BBC Three, BBC Four, BBC News, BBC Alba (Scotland only), BBC Scotland TV channel (Scotland only), ITV, S4C (Wales only) Channel 4 and Channel 5.
- We will continue to ask about satisfaction with PSB overall (Q18).
- We will continue to measure children’s PSB delivery separately, assessing CBBC, CBeebies, Channel 5, with the new addition of CITV and BBC Alba. We will also continue to measure the provision of a wide range of high quality and UK-made programmes for older children for Channel 4.
 - We will measure against the following statements for young children: “high-quality programmes for children” and “a wide range of UK-made content for children”.
 - We will measure against the following statements for older children: “high-quality programmes for older children” and “a wide range of UK-made content for older children”.
- We also plan to add in a description of PSM is to help aid understanding and improve the quality of responses. The previous survey did not explicitly describe PSB but sought to evaluate its importance and delivery through rating the purposes and characteristics.
- An example of this from the recent PSB Review quantitative research is as follows: *“Collectively, the BBC, Channel 4, Channel 5, (ITV/ STV in Scotland/ UTV in Northern Ireland) and S4C in Wales are known as ‘public service broadcasters’. As a group they have obligations to deliver programmes and services which cover a wide range of subjects and meet the needs and interests of many different audiences across the whole of the UK. They are expected to meet high standards, to inform, educate and entertain, and to reflect and support cultural activity in the UK”* This will be refined for next year’s survey.

Changing the method used to measure the importance of PSB in order to better establish priorities

- Currently, we measure the importance of each of the PSB ‘purposes’ and ‘characteristics’ for PSB as a whole (Q16) using a 1-10 scale.
- We propose to stop asking this question and instead ask respondents’ which attributes (from the revised list) they value for themselves and which they value for society. We will ask agencies to recommend question techniques for creating prioritisation between attributes in order to gain a better understanding of differentiation between attributes.
- Our PSB Review quantitative research demonstrated that respondents are able to distinguish between personal and societal value, and we see different priorities emerge for each. We

think this is a useful way of conceptualising the value of PSB attributes to the general public with more nuance than the current question.

Specific questions for removal

- We are planning to stop asking some questions, as we do not believe they are useful to the questionnaire in their current form. These questions are listed below, alongside a rationale for their removal.
 - Q19: this question asks about PSB satisfaction compared to a year ago. We do not believe this offers any key extra information, duplicating much of what is found from asking Q18- in 2019, over half (56%) said they had the same satisfaction compared to a year ago
 - E2: this question is related to the use of different devices to watch different types of content. We're proposing to remove this, as it is not related to the objectives of the tracker.
 - A4, A4a, Q27, Q28, Q30: these questions relate the use of PSB websites, and opinions of bbc.co.uk and channel4.com. We do not believe these questions offer useful data, and in the case of the BBC websites, similar information is collected on the BBC Performance Tracker.
- We may also change or remove some of the demographic questions. We will make this decision closer to the time of fieldwork, as there may be impacts of Covid-19 that influence how we ask some of them.

Proposed changes to the methodology

- The PSB tracker has most recently been conducted using a mixed-mode face-to-face and online methodology with a 50/50 split. Due to the ongoing situation surrounding the Covid-19 pandemic and current guidelines that are in place, Ofcom made the decision in 2020 to suspend all face-to-face fieldwork across all consumer research projects to protect the safety of everyone involved. For the 2021 fieldwork period, we anticipate that it is likely that face-to-face fieldwork may still not be possible.
- We recognise that by not being able to conduct face-to-face fieldwork, it may be more challenging to capture the views of low or no internet households. We aim to mitigate this by choosing a methodology that is not exclusively online.
- The recent PSB Review quantitative survey was conducted via a CATI/ online mixed methodology. Other Ofcom studies have begun utilising a post-to-web or post-to-telephone approach. We plan to take learnings from these methods and will consider the appropriateness of each when we are closer to fieldwork.
- However, we recognise that at some point in the future, face-to-face fieldwork will likely resume. We believe that a 50/50 split between face-to-face and online fieldwork remains the best option, in order to balance accessing an increasingly online population, whilst ensuring we gather the opinions of low or non-internet users. We will consult on any further changes to methodology if required.