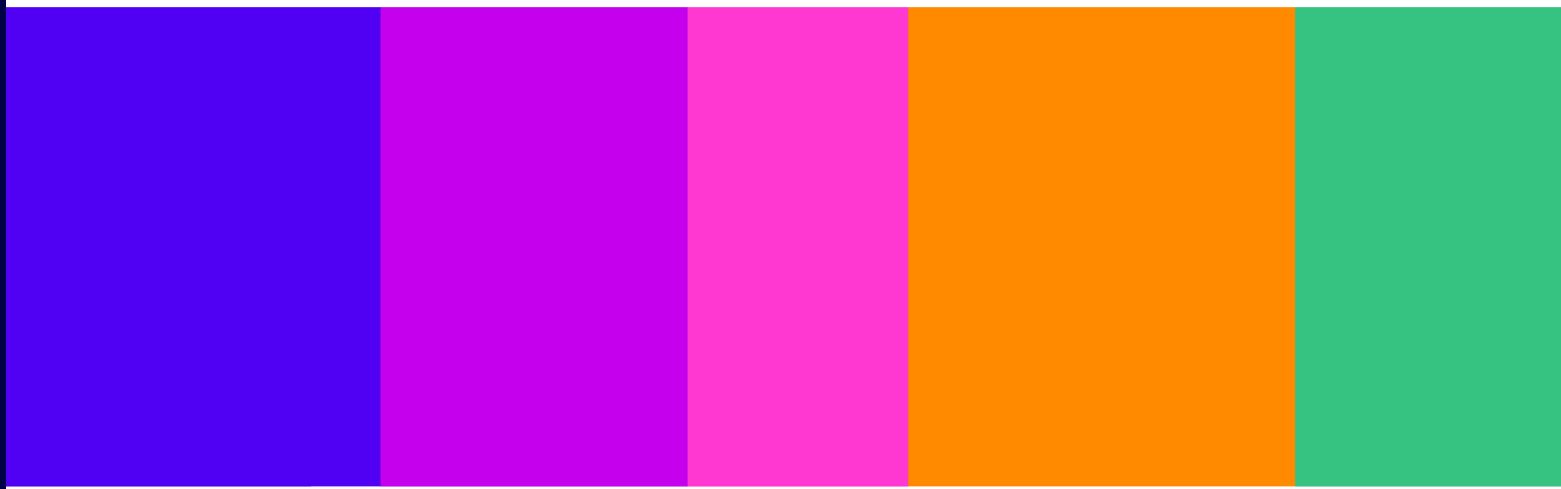


Annex 1

Methodologies and Glossary

Published: 3 August 2023



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Research Survey Methodologies

Ofcom Technology Tracker

The Technology Tracker is a survey run once a year with about 4,000 adults aged 16+ in the UK. In 2023, fieldwork was conducted from 20th January to 24th April. This year the tracker was conducted with 80% of the respondents completing the survey face-to-face, and the remaining 20% of respondents completing the survey online through a post-to-web approach. This is slightly different to last year's approach which was 100% face-to-face completion, but this does not affect our ability to compare trends between 2022 and 2023. It provides us with an understanding of consumer attitudes and behaviour in the UK communications markets, helping us to monitor change. The data collected is weighted to the profile of UK adults.

The aim of the Technology Tracker is to help understand:

- Access and take-up of telephony services
- Activities conducted on mobile phones and the internet
- Take-up of TV services, including paid-for and free TV, plus video-on-demand services
- Take-up and listenership of radio and audio services, including digital radio
- Take-up of smart technology
- Bundling of services

Ofcom Public Service Media (PSM) Tracker

The Public Service Media Tracker (PSM) is a continuous annual survey with about 3,000 UK adults aged 16+. In 2022, fieldwork was conducted from 14th February to 13th December. It utilised a combination of push-to-web, push-to-telephone, online panel and river sampling methodologies. We surveyed 3,027 UK adults aged 16+ in total, including 1,979 in England, 330 in Scotland, 328 in Wales and 390 in Northern Ireland. Data is weighted to be nationally representative of the UK using mid-2020 population estimates, 2011 census, 2017 annual population survey.

The aim of the PSM is to help understand:

- Audience satisfaction with PSB services
- Delivery of PSB attributes
- Understand the reasons why audiences do not use certain PSB services
- Understand satisfaction and delivery for PSB BVoD services
- Understand PSB in the context of the media marketplace, including an assessment of satisfaction and delivery of selected online streaming services

Ofcom News Consumption Survey

The News Consumption Survey gathers information about news consumption across the UK and within each UK nation. This includes sources and platforms used, the perceived importance of different outlets for news, attitudes towards individual news sources and local news use.

It uses a combination of online and face to face research to gather a nationally representative sample of 4,556 UK adults. In 2021 Covid-19 prevented us from running the face-to-face research. We were able to return to face-to-face research in 2022 and 2023. We therefore make comparisons between 2018-2020 and 2022-2023, but we cannot make direct comparisons between those years and 2021.

Fieldwork for the adults' survey this year took place across two waves: from 7th November – 7th December 2022 and from 27th February – 3rd April 2023.

Ofcom VoD Survey

The VoD survey is a quantitative survey exploring the use of and attitudes towards video-on-demand services. Firstly, an online survey among a sample of 2,203 UK nationally representative people aged 13+ (with a boost to reach at least 150 respondents per nation) was conducted via Yonder's online omnibus. Fieldwork took place from 22nd to 27th February 2021.

Followed by supplementary questions on Yonder's telephone omnibus (consumption questions Q1a, Q1b, Q2a & Q2b) among a sample of 1,039 UK nationally representative people aged 18+, with a 50% landline, 50% mobile approach. CATI fieldwork took place from 24th February to 9th March 2023. Data from questions collected via CATI were then combined with the online omnibus data.

The aim of the VoD survey is to help understand:

- Consumption of video-on-demand or streaming services
- How services are used
- Attitudes to video-on-demand or streaming services
- Perception of the services subscribed to
- Subscription and types of payment for Netflix, Amazon Prime Video and Disney+
- Reasons for subscribing/ unsubscribing
- Watching online content on TVs
- Audiovisual translation

Ofcom Audio Survey

The Audio Survey is a quantitative survey exploring behaviours and attitudes to different audio platforms and providers. Firstly, an online survey among a sample of 2,259 UK nationally representative people aged 16+ (with a boost to reach 150 respondents per nation) was conducted via Yonder's online omnibus. Fieldwork took place from 27th February to 3rd March 2023.

One question (Q1) was then placed on Yonder's telephone omnibus. This reached a 1,000 nationally representative sample in the UK aged 16+ with a 50% landline, 50% mobile approach. Data was then merged with the results of the online omnibus to provide a comprehensive picture of the audio landscape inclusive of a non-online audience. CATI fieldwork took place from 14th to 25th February 2023.

The aim of the Audio Survey is to help understand:

- Use of radio & online audio providers
- Online audio content preferences
- Use of BBC services
- Awareness of BBC Sounds
- Impact of BBC Sounds on other audio listening
- Perceptions of audio services and importance of certain features

Ipsos iris

Launched in early 2021, Ipsos iris is the [UKOM endorsed currency](#) for the measurement of audiences of online content of UK adults aged 15+ who use the internet at least once a month.

Ipsos iris uses a hybrid methodology with several data sources including:

- A passive single-source panel of over 10,000 adults who use the Internet. Panellists install passive tracking software onto personally used digital devices (smartphones, computers, and tablets) that access the internet with data collected continuously. The panel is recruited to be representative of the internet population demographically, geographically and by device type usage.
- Census measurement of publisher websites and apps to collect visit measures for time spent and page views at a total level.
- A high quality Establishment Survey to produce universe targets. The Ipsos iris panel is then weighted to the internet population of UK adults aged 15+ and demographic sub-groups.
- External first-party data from accredited and approved sources with additional website or app level targets.

Reporting on daily and monthly data, all sources are fused together to create a synthetic dataset with more than one million records to represent the UK online infrastructure of websites and apps. These can be analysed and reported at many demographic and geographic levels. Due to this being a synthetic dataset, it is not possible to provide confidence intervals/ranges for extrapolated population estimates. However, it should be noted that all extrapolated population figures provided are estimates that will have some margin of error.

[See more detail on the Ipsos iris methodology.](#)

For the reports used here, we used Ipsos iris monthly data from March 2022 and March 2023. The passive panel for March 2023 covered a continuously measured sample of 10,725. The panel size by nation is below. Note that as this is a continuous panel so the reporting profile in other months will be similar.

Nation	March 2023 Ipsos iris panel size	%
England	8867	83%
Scotland	1006	9%
Wales	58	5%
Northern Ireland	284	3%
Total	10725	100%

The Insights Family UK

The Insights Family UK is a market research and insights resource on attitudes, behavioural and consumption pattern of 3-18-year-olds. More than 21,300 children a year in the UK take part in the survey.

IPA TouchPoints

TouchPoints is an on-going survey commissioned by the Institute of Practitioners in Advertising (IPA). TouchPoints uses a seven-day diary to capture media consumption and other daily activities every half hour as well a self-completion questionnaire which includes attitudinal statements and claimed behaviours.

From 2021 onwards, the survey has been split into two waves a year. Wave 1 takes place between January and March and wave 2 between September and November. Wave 2 2022 and wave 1 2023 together form the 2023 Superhub which is the data set that we have referred to the most in this report. The sample was approximately 6,000 adults altogether, aged 15+ across Great Britain.

Ampere Analysis

Ampere Analysis is a data and analytics firm. We reference various data points from its research, including financial metrics within the online video sector, and content hours in on-demand catalogues, segmented in various ways.

RAJAR

RAJAR is the official body responsible for measuring radio audiences in the UK. Fieldwork for the listening survey was suspended in March 2020 and resumed from Q3 2021 with a modified methodology, meaning comparisons with pre-Covid data should be treated with caution. For this reason we have included a break in any time series showing data prior to Q3 2021.

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, except from 16 February 2016 until 31 January 2022 when it did not broadcast as a linear channel.

The nations reports look at regional content broadcast across the national and regional variants of BBC One and BBC Two (and, since 2019, BBC Scotland in the Scotland report), as well as the holders of the Channel 3 licences 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 2022 were:

- **ITV:** ITV2, ITV3, ITV4, ITVBe and CITV
- **Channel 4:** E4, E4 Extra, More4, Film4, 4Seven, 4Music, Box Christmas, Kerrang!, Kiss and Magic
- **Channel 5:** 5USA, 5Action, 5Select and 5STAR

From 2017, we have also included first-run UK-originated content made available exclusively on BBC iPlayer, ITV Hub, All 4 and My5.

Since 2019, 4Music, The Box channels, Kerrang!, Kiss and Magic have been 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 changed in real terms.

Trend data showing programme costs over a number of years are given in 2022 prices (i.e. taking account of inflation, using the Consumer Price Index, as provided by the Office of National Statistics).

All spend and output data are based on programmes broadcast in each calendar year, e.g. 2022 data reflect programmes broadcast during 2022.

Output hours

Definition of peak time

The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three (during periods in which it was 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 Audiovisual 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.

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.

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

- 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

TV and AV consumption analysis

Total video consumption

This analysis uses industry measures wherever possible. The approach is constantly under review to reflect the latest data available as measurement capability advances.

The main input for the 2022 estimates is from Barb Audiences Ltd (Barb) See the next section, TV viewing figures for more information about Barb. Since November 2021, Barb's measurement extension has included more detail for some video-on-demand (VoD) platforms and video sharing platforms (VSPs), both across TV sets and other devices connected to a home's WiFi network. Barb does not measure out-of-home viewing, so we have estimated this based on IPA TouchPoints data and include it in our total video viewing figures. With Barb's measurement enhancements, in some cases direct year-on-year comparisons are not yet possible. Therefore, we note directional trends where calculations are similar to 2021 or where there are other sources to back this up.

In previous years, the total video consumption estimates included profiling for VoD and YouTube video viewing on TV sets using IPA TouchPoints, as well as data from Comscore for YouTube on non-TV devices.

Categories excluded from this year's analysis are gaming on TV sets (previously included), cinema viewing and consumption of billboard and outdoor advertising video.

'Broadcaster content' includes live TV, recorded playback and BVoD. 'Other TV set usage' includes viewing of some SVoD/AVoD/VSP services that cannot be definitively identified by Barb. This category also includes some EPG/menu browsing, viewing when the audio is muted, some unmeasured broadcast channels, piracy, unmeasured boxsets/pay-per-view content, and non-video internet activity through a PC or other device connected to the TV. SVoD excludes viewing of NOW, which is captured within BVoD along with Sky Go/Sky On Demand (these two services stream the same content, meaning that measured viewing cannot be separated).

TV viewing figures – Barb

The data are provided by Barb Audiences Ltd (Barb), the industry's standard for understanding what people watch. Barb uses a hybrid approach, integrating people-based panel data with census-level online viewing data to provide the official broadcast TV measurement for the industry. Barb's panel currently consists of a nationally representative panel of approximately 5,300 homes (approximately 12,000 individuals). Data Barb collects includes viewing of broadcast TV through TV sets and via any devices attached to TV sets, such as computers, streaming devices or set-top boxes. Barb also captures device-based big data whenever anyone in the UK watches a broadcaster's video-on-demand (BVOD) service on a connected device, as well as some viewing data for online streaming services and for devices not connected to the TV being watched at home via WiFi. Barb does not capture any out-of-home viewing to any service.

Unless otherwise stated, 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 for 28-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 28 days after first broadcast (known as time-shifted viewing). 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.

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.

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 aged 35+.

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 S4C and all BBC portfolio channels excluding BBC Alba (as this is not measured by Barb).

Other third-party sources

Advertising Association (AA) / WARC Expenditure Report

BPI

British Film Institute (BFI)

ERA

GroupM

IAB and PwC Digital Adspend Study 2022

Official Charts Company

Pact