



Public Service Broadcasting: Annual Report 2014 Annex 8.i

Information Pack
Methodologies

Annex

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Annex 8

Methodologies

This annex includes information about the research data sources within this report. Further detail and the data itself can be found at: <http://stakeholders.ofcom.org.uk/market-data-research/statistics/>

1.1 PSB Tracker

This section outlines the current methodology used in 2013 as well as the changes undertaken in previous years of the survey.

Data collection

The Ofcom PSB Tracker is conducted via telephone interviews (CATI) with adults aged 16 and over. The first full year of fieldwork was 2006. As in 2011, fieldwork was changed from four months (January, April, July, and October) to continuous interviewing across the year (March to December), this enabled a more consistent measure of attitudes to PSB over 2012 and minimised the influence of seasonality resulting from interviewing during specific periods. Alongside this continuous interviewing also allowed analysis of specific events within the year, if required.

In 2013, a total of 3,028 interviews were conducted (1,622 in England; 500 in Scotland; 454 in Wales; 452 in Northern Ireland). In 2006 around 1,874 interviews in total were conducted per quarter with around 1,750 interviews per quarter conducted in 2007, 2008, 2009 and 2010 (approximately 990 in England; 250 in Scotland; 250 in Wales; 250 in Northern Ireland). In 2011 3,109 interviews were conducted and in 2012, 3025 interviews were conducted with similar proportions of interviews within each of the nations.

In previous years, the sample was approximately 7,000 interviews conducted in four waves. The reduction was part of Ofcom's spending review to improve efficiency of operations and reduce costs to licensees.

As in previous years, the Wales sample was boosted among viewers of programming on S4C to enable reporting on S4C.

Fieldwork was conducted by BDRC Continental.

Quotas

In 2013, quotas were set on: gender, nation and English region, social grade, parents, working status and ethnicity using data from the 2001 census population estimates (ONS). Representation of BAME groups was slightly increased to allow for demographic changes since 2001. Quotas were also set on mobile only households based on penetration levels taken from Ofcom Technology Tracker. Age quotas were introduced to provide a more accurate representation of the UK population, with 16-34s split into 16-24 and 25-34; 35-54 split into 35-44 and 45-54; and 55+ split into 55-64, 65-74 and 75+.

Weighting

Quotas were applied and survey data were weighted to be nationally representative of adults 16+. Weights were applied to: gender, age, region, social grade, working status and ethnicity, using data from mid-2004 population estimates (ONS). The weights are required

to adjust for any minor short-falls in quotas being met and to down weight the devolved nations to ensure the sample is nationally representative. The unweighted counts for the devolved nations are higher than required to be nationally representative to allow robust reporting at nation level.

Main questionnaire

The focus of the questionnaire is for respondents to rate specific TV channels on different aspects of broadcasting relating to the PSB purposes and characteristics. The research statements that they were asked about correspond to the purposes and characteristics as set out in Figure 1.

Figure 1 PSB purposes and characteristics and their alignment with PSB Tracker statements

PSB purposes and characteristics	PSB Tracker statements
Purpose 1: To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas	Its news programmes are trustworthy Its programmes help me understand what's going on in the world today Its regional news programmes provide a wide range of good quality news about my area***
Purpose 2: To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning	It shows interesting programmes about history, sciences or the arts
Purpose 3: To reflect and strengthen our cultural identity through original programming at UK, national and regional level, and by occasionally bringing audiences together for shared experiences	It shows high quality soaps or drama made in the UK Provides a wide range of high quality and UK-made programmes for children* Provides a wide range of high quality and UK-made programmes for older children*** It portrays my region (IN ENGLAND)/Scotland/ Wales/Northern Ireland (Nations) fairly to the rest of the UK***
Purpose 4: To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere	Its programmes show different kinds of cultures in the UK**
High quality – well funded and well produced	It shows well-made, high quality programmes
Original – new UK content rather than repeats or acquisitions	It shows new programmes, made in the UK***
Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones	It shows programmes with new ideas and different approaches
Challenging – making viewers think	It shows programmes that make me stop and think
Engaging – remaining accessible and attractive to viewers	It shows programmes I want to watch
Trust ¹	I trust this channel*

¹ This was included as a statement in the PSB Tracker in order to monitor the extent to which trust is assigned to the main PSB channels as the digital TV environment expands. The statement was also included partly as a result of the issues surrounding phone votes within programmes on the PSB channels and in order to understand opinions on the channels after the resolution of this.

* Statements added to the PSB Tracker for 2007
**Statements changed within the PSB Tracker in 2008
***Statement changed within the PSB Tracker in 2011

Respondents were asked to individually rate each channel that they watched regularly. The channels list comprised BBC One, BBC Two, ITV, Channel 4, S4C, Channel 5, BBC Three, BBC Four and BBC News. Those who viewed any of these channels regularly or occasionally were also asked to consider all of the channels together for each of the research statements. Statements on BBC Three, BBC Four and BBC News were only asked of multi-channel households. BBC News 24 was added to the questionnaire in April 2007 and was changed to 'BBC News (formerly called BBC News 24)' in the survey in July 2008. BBC Parliament was also added in July 2008.

Respondents were asked to rate the channel in relation to a statement on a 10-point scale where 10 is the highest score and 1 the lowest. Prior to July 2008, viewers had been asked the extent to which they felt the statement applied (10 = applies completely; and 1 = does not apply at all) to each channel. No major differences found in terms of the ratings provided using the slightly different wording.

The order of asking about individual channels was rotated to minimise order bias. Fifty per cent of the sample was asked about channels in order A below, and the remainder asked in order B:

- A: BBC One, BBC Two, BBC Three, BBC Four, BBC News, BBC Parliament, ITV, Channel 4, Channel 5, all channels combined
- B: ITV, Channel 4, Channel 5, BBC One, BBC Two, BBC Three, BBC Four, BBC News, BBC Parliament, all channels combined

Respondents were also asked to rate how important it is that the PSB channels together fulfil the PBS purposes and characteristics. This provides useful context for the data on how the PSB channels are rated on these elements.

Questionnaire Changes in 2011

In 2011, Ofcom undertook a detailed expenditure review in order to improve the efficiency of operations and reduce the cost to licensees. As part of the process, the scale and scope of each of Ofcom's tracker surveys were reviewed to see if there were more cost-effective ways of delivering the same objective. As a result of this, some changes were made to the PSB tracker in 2011. The reduction in sample size (from 7,000 to 3,000 interviews per year) has already been mentioned but the questionnaire was also streamlined by reducing the PSB characteristics and statements from 20 to 13 (see Figures 2 to 4), removing non-PSB digital channels, and removing questions relating to PSB content online.

Detailed analysis was conducted to determine which statements and characteristics should be retained and which required amendment.

This consisted of:

- i) Factor analysis of historical tracker data to determine which of the 20 statements were key drivers of overall PSB consideration;

- ii) Quantitative research to determine how respondents interpret each statement and whether or not any of the language is problematic.
- iii) Consideration of the PSB purposes characteristics to ensure each one is represented in the questionnaire and applied to the appropriate channels.

Figure 2: Statements which were retained

Purpose/Characteristic	Statements to be included
P1. Informing our understanding of the world	Its programmes help me understand what's going on in the world today
P1. Informing our understanding of the world	It's news programmes are trustworthy
P2. Stimulating interest and knowledge	It shows interesting programmes about history, science or the arts
P3. Informing ourselves and others	Its regional news programmes provide a wide range of good quality news about my area
P3. Reflecting and strengthening cultural identity	It shows high quality soaps or dramas made in the UK
P3. Reflecting and strengthening cultural identity	It portrays Scotland ("my region" (England),Wales, NI) fairly to the rest of the UK*
P3. Reflecting and strengthening cultural identity	Provides a wide range of high quality and UK made programmes for children (asked of parents with children aged 12-15 only)
P4. Making us aware of different cultures/viewpoints	Its programmes show different kinds of cultures within the UK
High quality	It shows well-made, high quality programmes
Innovative	It shows programmes with new ideas and different approaches
Engaging	It shows programmes I want to watch
Original	It shows new programmes, made in the UK
Challenging	it shows programmes that make me stop and think

Figure 3: Retained statements by channel

Retained Statements	BBC1	BBC2	ITV	Ch4	Ch5	BBC3	BBC4	BBC News	CBeebies	CBBC	S4C
Its programmes help me understand what's going on in the world today	X	x	x	x	x	X	x	x			x
It's news programmes are trustworthy	X	x	x	x	x	X	x	x			x
It shows interesting programmes about history, science or the arts	X	x	x	x	x	X	x				x
Its regional news programmes provide a wide range of good quality news about my area	X		x								
It shows high quality soaps or dramas made in the UK	X	x	x	x	x	X	x				

It portrays Scotland ("my region" (England),Wales, NI) fairly to the rest of the UK	X	x	x	x	x	X	x				
Provides a wide range of high quality and UK made programmes for children (asked of parents with children aged 12-15 only)	X			x	x				x	x	x
Its programmes show different kinds of cultures within the UK	X	x	x	x	x	X	x				x
It shows well-made, high quality programmes	X	x	x	x	x	X	x				x
It shows programmes with new ideas and different approaches	X	x	x	x	x	X	x				x
It shows programmes I want to watch	X	x	x	x	x	X	x				x
It shows new programmes, made in the UK	X	x	x	x	x	X	x				x
it shows programmes that make me stop and think	X	x	x	x	x	X	x				x

Figure 4: Removed Statements

Statements to be removed
As a result of watching its programmes I've become more interested in particular subjects
It covers big national events well, like sports, music events or major news stories
Its entertainment and factual programmes show people from different parts of the UK
Its programmes reflect the interests and concerns of people like me
Its programmes offer a range of opinions of subjects and issues
Aside from news, it provides a range of good quality programmes about my region/nation
I trust this channel

Pre 2011 Questionnaire Changes

The 2009 questionnaire incorporated two main changes compared to the previous year. In Q2 2009 a new question was added which asked respondents to compare their satisfaction with one year ago. This was followed by an open-ended question, which enabled respondents to explain the reasons for their increased or decreased satisfaction in their own words. In addition, from Q3 2009, three further questions were added, designed to ascertain respondents' use of DVRs (digital video recorders) TV on demand and online viewing.

During each quarterly period of fieldwork, one of three 'modules' (Internet, Digital channels and Teletext) was inserted into the main questionnaire. These modules were inserted as follows in 2010:

Q1 (January) = Internet Module (designed to explore the types of public service content viewed on the internet, how this content is found and respondents' opinions of the content)

Q2 (April) = Digital channels module (respondents were also asked to rate a selection of non-PSB channels and PSB digital portfolio channels if they were regular viewers of these)

Q3 (July) = Teletext module

Q4 (October) = Digital channels module

In the digital channels module, respondents were also asked to rate a selection of non-PSB channels and PSB digital portfolio channels if they were regular viewers of these. The digital channels module had a similar structure to the main questionnaire, asking respondents to state the frequency with which they watched a variety of digital channels: ITV2, E4, Sky1, More4, Yesterday, Sky News, Discovery Channel, and Living. Those who watched each channel regularly were then asked to rate these channels on a number of statements relating to a range of areas (e.g. news, current affairs and other factual programmes, programme quality). Only relevant questions were asked about each channel so that, for example, questions concerning news were not asked about those channels on which news is not shown.

The digital channels module differed from the main survey in that satisfaction with 'all channels combined' and 'importance rating' questions were not asked.

The Teletext module (Q3 2010) explored the frequency with which Teletext, Ceefax, BBCi and Sky text were used, and then asked respondents to name (from a pre-coded list) the types of information they accessed on digital and analogue Teletext. The final section asked respondents whether they had noticed the changes to the Teletext service, whether they missed any aspects and what services they were using instead.

In January 2009, a new module concerning online public service content was created within the PSB Tracker telephone survey. This questionnaire was designed to explore the types of public service content viewed on the internet, how this content is found, and respondents' opinions of it, and was based on an omnibus survey carried out by GfK in June 2008.

Those who claimed to use the internet for public service content were asked the extent to which they agreed with five statements, such as: '*The internet is a good source of new public service content*'. In the January 2010 version of this module the number of statements was reduced from five to three. In both 2009 and 2010, all respondents (regardless of their use of the internet) were asked to rate the importance of 15 statements, where 1 represents 'not at all important', and 10 represents 'extremely important'. These statements were designed to address similar topics to the main survey and included statements such as: "*Helps me to*

learn and find out about subjects". The January 2010 internet module also featured two new questions relating to the BBC and Channel 4 websites. These asked respondents to rate the importance of providing online video services and high quality, trustworthy web content.

Wales boost

During each quarter of fieldwork, a Wales boost questionnaire was run alongside the main survey. This questionnaire mirrored the content of the main questionnaire, (with the same statements being rated), but asked only about S4C, all channels combined and importance ratings. The interchangeable modules used in the main questionnaire were not inserted into the Wales boost. Those who did not watch any of the S4C programmes in the Welsh language, and those who did not watch S4C regularly, were screened out.

Analysis and reporting conventions

The majority of analysis was carried out on 'regular' viewers. Regular viewers provide a more informed opinion as they are more involved with the channels, and rely less on potentially out-of-date or unfounded perceptions of the channel. Moreover, including 'occasional' viewers increases the level of 'don't know' responses, thereby reducing the granularity of the insight provided.

Viewers were asked to rate each channel (and the channels taken together) out of 10, and the top four scores (7-10) were used to calculate responses, correlating to a very/quite response. Throughout the report this is expressed as: "the channel is rated highly on...".

Throughout this document, only statistically significant differences will be reported within the text and also highlighted on the charts. Reported differences between survey figures are significant at the 99% level to accommodate the impact of sample design and weighting. This means that there is a high level of confidence that any reported differences reflect a true attitudinal or behavioural change rather than being caused by a change in sample methodology or profile. In previous reports, significance testing was performed at the 95% level, so this represents a more robust approach to reporting.

Reweighting of 2007, 2008, 2009 and 2010 data

As mentioned above, between 2010 and 2011, the PSB research tracker saw changes in the questionnaire, the quotas applied and the research company commissioned to undertake the research. Although the change in quotas and most questionnaire changes had limited impact on ability to analyse trend data, one questionnaire change had significant impact.

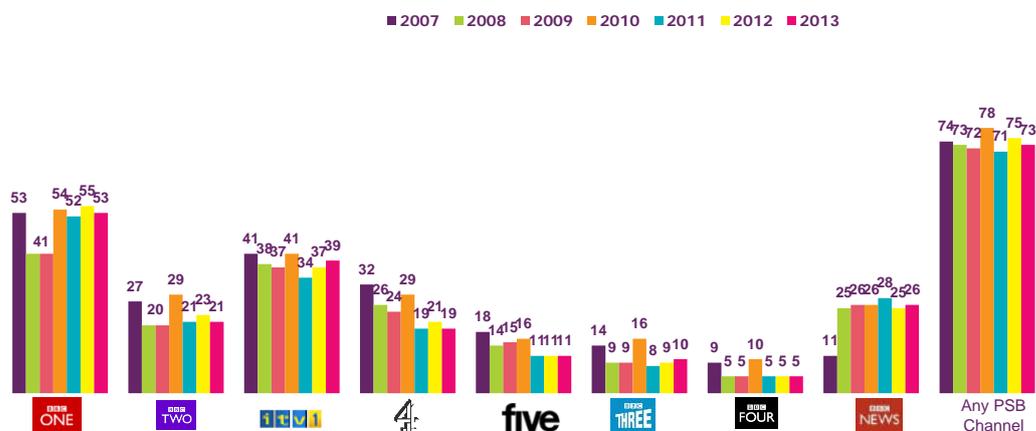
In the questionnaire used in 2010 and previous years, for each channel, respondents were asked whether they were regular viewers of that channel and then immediately how frequently they watch that channel – daily, weekly etc. In 2011, the regularity question was asked for all channels before respondents were asked about frequency of viewing. This had a significant impact on number of people who watched a programme frequently as shown. Figure 5 below shows the results against those of previous years PSB Tracker survey.

After consideration and analysis, it has been decided to retain the new questionnaire structure going forward as it removes an element of priming the respondents. If asked how regularly a channel is watched and then immediately the frequency, respondents would measure their first response based on the two questions for all subsequent channels asked. As in pre-2011, the channels were rotated, so different respondents were presented with different channels first, this priming effect was not concentrated on specific channels.

In order to allow comparison of 2011 data with previous waves, the previous waves were reweighted to ensure consistency in number of regular viewers for channels. Three rim weights were applied – the first whether a respondent was a regular viewer of BB1/BBC2, the second whether they were a regular viewer of ITV/Channel 4/ Channel 5 and the third whether they were a regular viewer of BBC3/BBC4/BBC News. As the priming effect differed by age of respondents, the weights within each rim differed by age band of respondents. These three rims were then multiplied by the original demographic weight to ensure the sample was still nationally representative.

The impact of the weighting is shown in Figure 5. This reweighting brought the 2007, 2008, 2009 and 2010 data more closely in line with the 2011 data. The digital channels are overstated due to the impact of digital switchover between 2007 and 2011.

Figure 5: The Proportion of Respondents who are self-claimed regular viewers (after re-weighting 2007, 2008, 2009 and 2010 data)



2011 2012 Shows direction of significant differences from 2011/2012 to 2013 at 99% level

Base: All respondents (7192, 6845, 6981, 6964, 3109, 3025, 3028)

1.2 PSB Portfolio channels research

PSB Portfolio channels included in the research

- ITV2
- ITV3
- ITV4
- E4
- More 4
- Film 4

Methodology and Sample

- 800 interviews were conducted amongst regular viewers of at least one 'Portfolio Channel'
- Fieldwork carried out online – 25th March to 14th April 2014

Weighting

- To ensure data was representative, initial screening interviews were used to target respondents that matched the profile of the online UK population age 16+
- Data was weighted to match the demographic profile of all those online.
- A separate rim weight for age, based on the profile of viewers of any portfolio channel was applied.
- This age weight was derived from the main PSB Tracker (which is conducted via telephone).
- The subsequent data has a weighting efficiency of 93%.

1.3 Viewing figures – BARB

The data are provided by the Broadcasters' Audience Research Board (BARB), a panel of 5,100 homes providing TV measurement for the industry.

The analysis focuses on the changes to viewing of the PSB channels, PSB portfolio channels and all other channels (where applicable) which we refer to as multichannels. Figure 6 shows the channel group definitions used in the TV Viewing report.

The viewing metrics used in the analysis are hours of viewing, average weekly reach, channel share and channel profile. A dedicated programmes section focuses on total annual viewing hours to genres, which shows the total annual hours of viewing by an average individual of a given programme genre. The proportion of viewing of programme genres is also included. The genre analysis is approached in two ways; from a channel by genre perspective and from a genre by channel perspective. Most figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency.

As of 1 January 2010 a new BARB panel was introduced. There are two key features of this; firstly, the old and new panel consist of entirely different viewer panels, and secondly, there was a re-defining of geographic boundaries under the new panel. As a result of these changes, comparisons between data pre and post panel change must be considered with caution.

Changes to the BARB reporting system in 2010 now also 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, analysis within this 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 as of April 2014.

Figure 6 Definitions: BARB channel classifications

Main five PSB channels	BBC portfolio channels	Commercial PSBs' portfolio channels			Multichannels
		ITV portfolio channels	Channel 4 portfolio channels	Channel 5 portfolio channels	
BBC One	BBC Three	ITV+1	Channel 4+1	Channel 5 +1	All other remaining channels
BBC Two	BBC Four	ITV2	E4	5*	
ITV	BBC HD	ITV2+1	E4+1	5*+1	
Channel 4*	BBC News	ITV3	More4	5 USA	
Channel 5	BBC Parliament	ITV3+1	More4+1	5 USA+1	
	CBeebies	ITV4	Film4		
	CBBC	ITV4+1	Film4+1		
	BBC Olympics channels	CITV	4Music		
	BBC red button channels		4seven		
			Channel 4 Olympics channels		

Channels include HD variants where applicable

*Channel 4 data for 2008-2009 includes S4C viewing. Following DSO in Wales in 2010, Channel 4 data from 2010 relates to viewing to Channel 4 only.

1.4 Programme genre definitions – BARB

The genres defined in the TV Output and Spend section and those used in the TV Viewing section use different datasets, which have slightly different programme classifications. The former is sourced from information submitted directly from broadcasters to Ofcom while the latter is sourced from BARB programme logs. Figures 7 and 8 below show the BARB definitions and the specific PSB genre groupings used in this report.

Figure 7 Definitions: BARB genre classifications

Note: Genres highlighted bold represent PSB genres

Genre label	Definition – BARB genres	Genre label	Definition – BARB genres
UK Drama	Drama: Single Plays – UK Drama: Series/Serials - UK	Comedy	Ent: Situation Comedy – UK Ent: Situation Comedy – US Ent: Situation Comedy - Rest of World Ent: Other Comedy Ent: Comedy Stand Up
UK Soaps	Drama: Soaps - UK		
Drama: Other	Drama: Single Plays - Non-UK Drama: Single Plays – Miscellaneous Drama: Soaps - Non-UK Drama: Soaps – Miscellaneous Drama: Series/Serials - Non UK Drama: Series/Serials - Miscellaneous		
UK Films	Cinema Films: UK TV Films: UK		
Films: Other	Cinema Films: US Cinema Films: Rest of World - Foreign Language Cinema Films: Rest of World - English Language Cinema Films: Bollywood Cinema Films: Miscellaneous TV Films: US TV Films: Rest of World - Foreign Language TV Films: Rest of World - English Language TV Films: Bollywood TV Films: Miscellaneous Other Films (All)	Entertainment	Ent: Variety/M.O.R.Music Ent: Variety/Youth Ent: Chat Shows – General Ent: Chat Shows - Audience Participation Ent: Quiz, Panel and Game Shows Ent: Lottery Show/Updates Ent: Animations – Cartoons Ent: Animations – Puppets Ent: Family Shows Ent: Special Events Ent: Reality Ent: Cookery Ent: Bollywood Ent: Miscellaneous
		Music: Classical	Music: Classical – General Music: Classical - Documentary
		Music: Contemporary	Music: Contemporary – General Music: Contemporary – Documentary Music: Contemporary – Performance/Live Music: Contemporary – Chart Show or Countdown
		Music: Other	Music: Miscellaneous

Figure 8 Definitions: BARB genre classifications

Genre label	Definition – BARB genres	Genre label	Definition – BARB genres
Visual & Performing Arts	Arts (All)	Documentaries: Other	Documentaries: Human Interest Documentaries: Factual Drama Documentaries: Factual Entertainment Documentaries: History Documentaries: Crime/Real Life Documentaries: Travel Documentaries: Fly on The Wall Documentaries: Celebrity Documentaries: Miscellaneous
National/ International News	News: National/International		
Nations & Regions News	News: Regional		
News: Other	News: Miscellaneous News: Generic		
Weather	Weather: National Weather: Regional		
Current Affairs: Political/Economical/Social	Current Affairs: Political/Economical/Social	Religion	Religious (All)
Current Affairs: Other	Current Affairs: Consumer Affairs Current Affairs: Special Events Current Affairs: Magazine Current Affairs: Miscellaneous	Sport	Sport (All)
Leisure Interests	Hobbies/Leisure (All)	Children's	Children (All)
Documentaries: Science & Natural History	Documentaries: Natural History & Nature Documentaries: Science/Medical	Party Political Broadcast	Party Political Broadcast (All)
		Education	Education (All)
		Other	Other: New Programme

1.5 Viewing figures – BARB/Attentional

The data are based on bespoke analysis of viewing data provided by BARB and undertaken by Attentional Ltd, a registered BARB Bureau.

Attentional maintain a database of BARB programme data, and add to this a number of additional information fields that are not available from standard BARB datasets. These include repeat markings (based on listings data from a number of sources) and country of origin data, based on production company information. BARB viewing data is combined with these custom fields to provide more in-depth analysis of UK broadcast output and to build a picture of the consumption levels for first-run, UK made programming across the main five PSB channels. Analysis looks at the date range 2008-2013.

Ofcom have also attempted to gauge the programme genre output and viewing impact of UK made first-run programming across the PSB portfolio of channels and all other multichannels in 2013 only. Data and analysis is based on the top 100 most popular programmes across the channel groups as a whole, analysed by channel within each group.

1.6 Children's data

Data are based on Ofcom annual returns:

1. PSB annual returns were collected for BBC One, BBC Two, ITV, ITV Breakfast, Channel 4, Channel 5 and the BBC's PSB digital channels: CBBC and CBeebies
2. Transmission and revenue annual returns were collected for Baby Network Ltd, BFTV, CSC Media Group Ltd, ITV plc, Viacom, Disney and Turner.
3. A request for information was made to the children's commercial multichannel broadcasters for first-run UK-originated hours and spend data for Baby Network Ltd, CSC Media Group Ltd, ITV plc, Viacom, Disney and Turner.

Spend

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).

Trend data showing programme costs over a number of years is given in 2013 prices (i.e. taking account of inflation, using the Consumer Price Index).

Hours

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. It is stated beneath each chart in this annex whether slot time or running time is used in the analysis.

BARB children's viewing data – as stated in 1.3 Viewing figures – BARB and 1.5 Viewing figures – BARB/Attentional

Survey data

A quantitative tracking survey conducted in 2011, 2012, 2013 and 2014. In April/May/June 2014, 1,660 in-home interviews with parents and children aged 5-15 were conducted, along with 731 interviews with parents of children aged 3-4. In April/May/June 2013, 1,689 in-home interviews with parents and children aged 5-15 were conducted, along with 685 interviews with parents of children aged 3-4. In March/ April 2012, 1,717 in-home interviews were conducted with parents and children aged 5-15, with 1,717 in-home interviews conducted in March/April 2011. In April/May and September/October 2010, 2,071 in-home interviews with parents and children aged 5-15 were conducted. In April/May and September/October 2009, 2,131 in-home interviews with children aged 5-15 and their parents/carers were conducted.

PSB survey data – as stated in 1.1 PSB Tracker

1.7 Output and spend data

PSB channels

Wherever possible, data have been provided for BBC One, BBC Two, ITV, ITV Breakfast, Channel 4, Channel 5 and the BBC's PSB portfolio channels: BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. BBC HD and BBC One HD has been excluded from most of the analysis in the report, as much of its 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. Data for S4C and BBC Alba are shown within the nations' and regions' section. Note: GMTV became Daybreak during 2010; the data relating to both services are labelled ITV Breakfast in the output and spend analysis. Data for the PSB channels is provided to Ofcom by the PSBs as part of their annual returns.

Non-PSB channels

Additional output and spend data was collected from non-PSB channels via an Ofcom request for information. Data was collected from the following commercial PSB portfolio channels: CITV, ITV2, ITV3, ITV4, 4Seven, E4, Film4, More4, 5USA and 5* as well as the following broadcasters; Sky, Viacom, UKTV, BT, Discovery, AETN, Turner, Disney, CSC and the Baby 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 has 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 has not moved in real terms.

Trend data showing programme costs over a number of years are given in 2013 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. 2013 data reflects programmes broadcast during 2013.

Output hours

Definition of peak time

The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three and BBC Four peak time runs from 7pm (when broadcasting starts on these channels) to 10.30pm, 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 region's output where running times are provided. The commercial PSB portfolio channels and multichannel broadcasters provided running times for their output data.

Genre definitions

The output data provided by the broadcasters use a set of programme genre definitions, as outlined below and agreed with broadcasters in 2006. 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.

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.

Religious & 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

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, docusoaps 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.
- Education and factual programmes for pre-school children.

1.8 Online Media Services

Chapter 4 “Online Media Services” draws upon a number of sources: Ofcom consumer research, third party consumer research, the Mori Study, the Enders Study, and VOD service programme request data.

Ofcom consumer research

Ofcom consumer research was drawn from Ofcom’s Technology Tracker. The Ofcom technology tracking survey is a face-to-face survey run by Saville Rossiter-Base. Its core objective is to provide Ofcom with continued understanding of consumer behaviour in the UK communications markets (covering mobile and fixed telecoms, internet use, TV, radio and bundling), to help monitor changes and assess the degree and success of competition.

Fieldwork is conducted in two waves; wave 1 takes place in January and February, and wave 2 fieldwork runs from May to July of each year. The sample is 2000+ UK adults aged 16+ per wave, reflective of the UK profile by sex, age, socio-economic group, region, employment status, cabled/non-cabled areas, rural/urban areas and levels of deprivation. Where necessary, the data have been weighted to ensure they are representative of the UK adult population.

Third party consumer research

We draw upon Decipher Research’s VOD Audit. Findings are drawn from the Q4 2013 summary report. The VOD Audit was prepared using data from new data collected throughout December 2013, and the previous three reports collected in March and June as well as September 2013.

The VOD Audit is a quarterly audit of the UK DTV and OTT VOD landscape. It is collected directly from the relevant set top boxes and online services over a period of 4 weeks. Since December 2013, Decipher automate collection of all online services, thereby improving accuracy and speed of collection.

A comprehensive and robust quarterly audit of VOD content² on all significant UK services: Sky, Virgin Media, BT TV and TalkTalk, Catch-up players: BBC iPlayer, ITV Player, 4oD and Demand 5, and OTT services Netflix, Lovefilm, Now TV, Blinkbox, Xbox Video, Playstation Store, Google Play, Sky Go, Wuaki, Wuaki Select, KnowHow Movies and iTunes.

Source: Decipher VOD Audit, Q4 2013

The VOD Audit provides some segmentation by genre, however these genres are different from those elsewhere in the report. They are defined as follows:

² Decipher define VOD content as “all content appearing in the on-demand areas of the covered platforms – this includes catch-up content, box sets (entertainment shows, news and documentaries), movies, sports shows, kids shows, and music.”

- **Catch-up** - On-demand programming available to access within 30 days of the original transmission.³
- **Movies** - Content in the movies area for each platform; either feature-length films, short films or trailers.
- **TV Box Sets** - On-demand TV shows available outside of the catch-up window: this also includes news bulletins and documentaries
- **Kids** - Children's archive TV shows which are given in a specific 'Kids' area; children's films are in movies section.
- **Sport** - Archive sports shows available either in specific 'sports' are or under a channel e.g. Sky Sports
- **Music** - Music videos, 'making of' short films and anything else which appears in music on-demand area
- **Adult** - Pin-protected adult movies and shows

The Mori Study

The quantitative research was a thirty minute face to face survey using CAPI (Computer Assisted Personal Interviewing). In total 2,026 interviews were completed between 24th July and 31st August 2014. The sampling approach was random location sampling, stratified by region, urban vs rural and deprivation. Quotas were set on gender, age, work status and ethnicity.

In order to ensure enough interviews were completed in each of the four nations, to allow robust statistical analysis, the sample was disproportionately stratified to boost the number of interviews in the devolved nations (a minimum of 150 interviews were conducted in each of Scotland, Wales and Northern Ireland).

The survey data have been weighted according to region, work status, and age to reflect the population profile nationally within each nation – England, Scotland, Wales and Northern Ireland. Because the survey was stratified to boost the number of interviews in the devolved nations the effective base size of the sample reduced to 1,919.

The Enders Study

Chapter 4 draws on a report titled "How online media services have fulfilled the public service objectives" commissioned by Ofcom written by Enders Analysis ('the Enders Study'). This report is published alongside the 2014 PSB Annual Report and the full methodology is outlined in Chapter 2 between pages 5 and 15. This methodology is summarised below.

The Enders Study comprised of three phases: researching a database of online media services, case study analysis of twelve online media services, and interviews with three key players working in digital media.

³ If a kids or sports show is within the first 30 day window, it will be counted in the catch-up area. Kids and sports sections are for archive/box set content only.

The database of online media services classified each service as a video-on-demand (VOD) service or an 'other internet service' (OIS), classified the type of company providing the service, named the parent company where appropriate, classified the principal funding model, listed the platforms on which the service was available, listed the country of origin, provided a short description and assessed which public service objectives Enders judged to be fulfilled by the service. The database was populated from existing databases of VOD services, services listed by web metrics firms Nielsen and comScore, and desk research.

Enders defined VOD and OIS as follows:

- **Video-on-demand (VOD) services:** as per the "on-demand programme services" definition in the Act, expanded to include services offering other forms of video content not covered by the on-demand programme services definition.
- **Other internet services:** typically providing text, pictures, video clips, audio clips, or other interactive content, excluding any service which could be defined as a VOD service.

Analysis of this database included assessment by the features of online media services listed above, as well as analysis of the audience and consumption of online media services by public service objective using comScore Media Metrix (MMX) data. comScore provided an unduplicated audience figure and total minutes spent by the internet population for each of the public service objectives for each December from 2009 to 2013. This was for laptop and desktop consumption only. A respective mobile unduplicated audience figure and total minutes spent was provided by comScore for December 2013 only.

Case studies were chosen from the services catalogued in the database through an iterative discussion between Ofcom and Enders Analysis. The case studies are a predominantly qualitative assessment of the nature of the service, how each of the services fulfils different public services, and the manner in which it does so. The case studies are available separately from the main Enders report⁴.

Video-on-demand service programme request data

Ofcom requested from the BBC, ITV, C4C and Channel 5 their programme request data for their on-demand programme services. A programme request is generated each time a user initiates an on-demand stream or download through the service. Requests for simulcast streams are excluded.

The on-demand programme services are BBC iPlayer, ITV Player, 4oD, Demand 5 for all the devices for which they are available, and the syndicated on-demand programme services provided by television platform operators⁵. In the case of C4C and Channel 5 this includes requests for programmes available on YouTube⁶. This excludes programmes provided by subscription video-on-demand services such as LoveFilm and Netflix, and excludes content bought or rented through transactional video-on-demand services such as iTunes or Google Play.

Where available, request data was provided at a total level for each year and by genre for each year. Guidance on genres was given to service providers as follows:

⁴ <http://stakeholders.ofcom.org.uk/consultations/psb-review-3/supporting-documents/enders-report/>

⁵ Namely, those services provided by Virgin, Sky and some legacy BT Vision set-top-boxes.

⁶ For full length programmes, not clips.

- **News** - A newscast or news bulletin providing network news coverage. News magazines should also be included which may contain a range of items related to news stories, with comment and elements of general interest. Separate weather reports and forecasts should also be included.
- **Current Affairs** - A programme which contains explanation and analysis of current events and issues, including material dealing with political or industrial controversy or with public policy. Consumer programmes and special events should be included under "General Factual". Party Political and Election Broadcasts should be excluded completely.
- **Arts and Classical Music** - Programmes displaying or presenting a cultural or artistic performance or event, and programmes providing information, comment or critical appraisal of the arts. The subject matter of arts programmes cover theatre, classical music, opera, dance, cinema, visual arts, photography and literature. Performances of popular contemporary music should be included with light entertainment.
- **Children's** - Programmes designed for a children's audience – drama, entertainment (including children's animation and cartoons), factual and pre-schools. Schools programmes should be included within the education genre.
- **Religious** - All forms of religious programming, including coverage of acts of worship, programmes intended to provide religious or spiritual inspiration to viewers through words and/or music, and informational programmes examining topics or issues related to religion, or looking at topics or issues from a religious point of view.
- **Factual** - Includes any form of factual or documentary programming, including features and coverage of special events, for example parliamentary proceedings, party conferences or coverage of royal events. Hobbies/leisure programmes, consumer programmes and reality shows should also be included. Drama documentaries should be included in the drama genre. Documentaries on the arts, or covering religious topics should be included in the arts or religion genre. Coverage of sports events should be included in sport.
- **Education** - Programmes with a clear educational purpose, usually backed by specially prepared literature publicised on screen and in other appropriate ways. Also includes social action programmes reflecting social needs and promoting individual or community action; schools programmes and Open University programmes. But does not include programmes with educational benefits, but not primarily driven by educational requirements.
- **Drama** - Drama productions including drama series and serials, soaps, mini-series and single plays, drama documentaries and TV movies.
- **Films** - All feature films that have had a prior theatrical release. TV movies should be included in "Drama: Mini-series and single plays".
- **Entertainment and Comedy** - All entertainment, including situation comedy, other comedy, chat shows, variety, popular contemporary music, cartoons and animation (except children's cartoons and animation), quiz shows, game shows and family shows.
- **Sport** - All forms of sports programming including coverage of a sporting event; sports magazines and highlights; and separate sports news or results programmes

covering items or reports about current sporting events. Sports items within news programmes should remain as news.

1.9 Radio

Radio listening figures – RAJAR

RAJAR (Radio Joint Audience Research) is the industry standard measurement body for radio listening in the UK.

Sample size and methodology

RAJAR has an annual sample of approximately 110,000 respondents aged 15+. It is a diary-based survey with participants in the survey completing a listening diary for one week. Listening data is collected by quarter hour. Respondents are asked to record their listening if they have listened to a station for a minimum of five minutes within a quarter hour.

The sampling is based on the total survey areas (TSAs) for each station measured by RAJAR. Each TSA is sampled in a way to be representative of the area that it covers.

RAJAR reports on a quarterly basis, with a sample of approximately 26,000 adults each time.

Figures used

RAJAR figures represent listening for an average week within the period included within the data. This data would typically be presented showing an average week within a quarter, six monthly or yearly basis. In this report we have used measures of reach and listening share.

- Reach – this indicates the proportion of the population, or the number of individuals, who have listened for a minimum of five consecutive minutes within an average typical week.
- Listening share – This is calculated from the total listening hours, which is the sum of all of the hours spent listening, from all respondents, in an average week. Listening share for a station is calculated as its total number of hours divided by the total number of hours for all stations within the relevant TSA.

Ofcom consumer research

Digital Day

In Q1 2014, Ofcom conducted an in-depth study on UK adults' and children's total media and communications activities to provide an overview of the role of media and communications in people's lives.

A nationally representative sample of 1,644 adults aged 16+ participated in the study across the UK in March-April 2014. A children's sample of 186 primary school children (aged 6-11) and 173 secondary school children (aged 11-15) also took part, completing a three-day media diary. Adult participants recorded all their media behaviour in a paper diary for seven days, and these data were captured on a daily basis online or by telephone. People recorded when they undertook any media and communications activity and what device they were using.

The study collected information on time spent, concurrent media use, device use, the importance of activities and the reasons they were undertaken. A questionnaire on the last survey day captured further contextual information on respondents' media activities and habits.

Ofcom deliberative research

Essential Research was commissioned by Ofcom in December 2012.

In broad terms, the key objective for the research was to understand whether the public purposes which radio has traditionally delivered continue to be valued by listeners in the digital age. A secondary objective was to understand listeners' attitudes towards, and expectations of, levels of localness on commercial radio in the future.

A qualitative deliberative research method was employed, in the form of six 4-hour sessions, each involving 24 regular radio listeners of various ages and backgrounds. A total of 140 participants participated across the study.

In radio and audio consumption terms, all were weekly, or more frequent, radio listeners. Soft quotas were set to ensure a good mix of national commercial, national BBC, local commercial and local BBC station listening at each table, and also a mix of device usage to cover analogue, digital and/or mobile listening.

The fieldwork took place in Birmingham, Durham, Edinburgh, Plymouth, Cardiff and Belfast on 24, 28 and 30 January, and 1, 4 and 7 February, 2013.

YouGov – New Generations and the Future of Radio 2013

This is a survey conducted among YouGov's online panel. It used a sample of 1,044 nationally representative UK adults aged 16+. It was conducted in May 2013. It asked a range of questions on use and attitudes to radio.

Commercial radio programme spend

Financial data has been provided by ten commercial radio groups which collectively represent 92.6% of all commercial radio listening. The period covers 2013 (January to December in most cases, September 2012 to October 2013 in the remainder). The ten radio groups were: Bauer Media, Celador Broadcasting, Communicorp UK, Global Radio, Lincs Group, Orion Media, Quidem Midlands, Town & Country Broadcasting, UKRD Group and UTV Media (GB).

Programme spend for commercial radio represents the total cost of production including copyright cost. Data provided covers the period January to December 2013 with the exception of two (smaller) groups reporting data October 2012 to September 2013. These figures are nominal.

Commercial radio revenue

Commercial radio revenue data is collected by Ofcom from all radio licensees on an annual basis. This data refers to the calendar year of each relevant period. It includes all revenue obtained by virtue of having a broadcast licence, including on-air advertising, sponsorship, calls to action and sale of airtime. Further information can be found in Ofcom's *Statement of Charging Principles*.

BBC expenditure

BBC spend on radio is taken from its Annual Report. Content spend is set out in the report. The overall spend is estimated by Ofcom by combining all of the radio related spend with an proportionate allocation of BBC-wide overheads to the radio.

Community radio

Data on the community radio sector is collected by Ofcom from all community radio licensees that have been on-air for at least one year. The information collected includes the amount and source of income, the amount and type of expenditure as well as information on the stations' key commitments.