International Communications Market Report 2017

Technical appendix

Appendix A: TV viewing methodology

Introduction

We use the data in the *One TV Year in the World* report to produce our analysis of broadcast TV viewing for our 15 comparator countries. The report is compiled by Médiamétrie.

Médiamétrie work with audience measurement and research organisations for each country that is included in their publication and bring together their respective industry standard viewing data into a single report.

We set out the industry standard criteria with the comparator countries below. The information reflects the status and reported data for each country at the time that Médiamétrie's report was published in April 2017. These might have evolved since then.

Figure 1   **Comparator countries and their audience measurement**

Country	Audience base	Area	2016 data range	Type of viewing reported
UK	Individuals 4+	National	1st January 2016 – 31st December 2016	Live + viewing on the same day as live + up to 7 days time-shifted
France	Individuals 4+	National	4th January 2016 – 1st January 2017	Live + viewing on the same day as live + up to 7 days time-shifted
Germany	Individuals 3+	National	1st January 2016 – 31st December 2016	Live + viewing on the same day as live + up to 3 days time-shifted
Italy	Individuals 4+	National	1st January 2016 – 31st December 2016	Live + viewing on the same day as live + up to 7 days time-shifted
USA	Individuals 2+	National	28 December 2015 – 25th December 2016	Live + viewing on the same day as live + up to 7 days time-shifted
Japan	Individuals 4+	Kanto region(the most selected region for analysis of TV viewing in Japan but should not be considered as equivalent to nationality representative data)	1st January 2016 – 31st December 2016	Live only
Australia	Individuals 0+	A combination of regional areas to reflect national data: Queensland, Northern New South Wales (NSW), Southern NSW, Victoria and Tasmania and Regional Western Australia	1st January 2016 – 31st December 2016	Live + viewing on the same day as live + up to 7 days time-shifted
Spain	Individuals 4+	National	1st January 2016 – 31st December 2016	Live only
Netherlands	Individuals 6+	National	1st January 2016 – 31st December 2016	Live + viewing on the same day as live + up to 6 days time-shifted
Sweden	Individuals 3+	National	1st January 2016 – 31st December 2016	Live + viewing on the same day as live + up to 7 days time-shifted
Poland	Individuals 4+	National	1st January 2016 – 31st December 2016	Live only
South Korea	Individuals 4+	National	1st January 2016 – 31st December 2016	Live only
Brazil	Individuals 4+	15 markets – Florianópolis, Campinas, Porto Alegre, Distrito Federal (Brasilia), São Paulo, Rio de Janeiro, Curtiba, Grand Belo Horizonte, Salvador, Vitória, Manaus, GoiAnia, Fortaleza, Recife, Belém	1st January 2016 – 31st December 2016	Live + viewing on the same day as live + up to 7 days time-shifted
India	Individuals 4+	National	1st January 2016 – 31st December 2016	Live only
Russia	Individuals 4+	National	1st January 2016 – 31st December 2016	Live + viewing on the same day as live + up to 7 days time-shifted
China National	Individuals 4+	National	1st January 2016 – 31st December 2016	Live + viewing on the same day as live + up to 7 days time-shifted

Broadcast TV viewing - Scheduled TV programming which is available to all viewers at the same time (such as those that are listed in electronic programme guides (EPG)). It includes time-shifted viewing of these programmes up to a specified number of days. **Error! Reference source not found.** details what is reported for each comparator country.

Live viewing - Watching programmes during broadcast at the scheduled time, not only to live events such as football matches.

Viewing on the same day as live (VOSDAL) – viewing to broadcast programmes other than at the time of broadcast but on the same day as it was aired.

Time-shifted viewing – viewing of broadcast programmes up to the specified number of days after live broadcast, excluding viewing on the same day as live.

Total time-shifted viewing includes VOSDAL plus any subsequent time-shifted viewing.

Time-shifted includes viewing through recording devices (such as a DVR) as well as to catch-up TV services (where applicable to the country). Viewing to devices such as PCs and laptops, tablets and smart phones where attached to the TV set are included where measured in the relevant country. In the UK, all of these forms of viewing up to seven days after broadcast are included in the industry standard data.

Guest viewing (i.e. people who are not normally part of the household in panel home) is included when measured by a country.

SVoD (Subscription video-on-demand) – a subscription service (usually paid monthly) that offers video-on-demand content (SVoD) usually delivered via the internet. Services may offer live streaming to a selection of channels/content as well as VoD content. Examples of SVoD services in the UK are Netflix, Amazon and Disney Life.

Full list of UK domestic publicly-owned channels including HD and +1 channels – BBC One, BBC Two, BBC Three (ceased March 2017), BBC Four, BBC News, BBC Parliament, CBBC, CBeebies and BBC red button services, along with Channel 4, E4, More4, Film4, 4seven, 4Music.

Appendix B: Consumer research methodology

Introduction

This section describes the methodology used for the 2017 international communications behaviour research, which was carried out by Populus, an independent market research agency, on behalf of Ofcom.

The survey covered the communications behaviour of internet users in nine markets: the UK, France, Germany, Italy, the US, Japan, Australia, Spain and Sweden. As in previous years, the research looked at the ownership and use of communications services and devices such as TV, mobile, fixed landline and the internet. In addition, it explored the changing nature of communication, and use of connected devices, postal services, online shopping, mobile payments, and take up of 4G and Superfast Broadband in the various markets.

The 2017 research comprised 9,113 interviews completed between 19th and 27th September 2017.

Research methodology

The international communications behaviour research was conducted using an international online consumer access panel. The research panel employed was managed by Toluna. The numbers of active panel members in each market are shown in **Error! Reference source not found.**. A total of 9,113 interviews with internet users were completed – with at least 1,000 in each market. Age and gender quotas in each market were set to ensure the samples were representative of the online population of each country. A small amount of post-survey weighting was applied to further refine the representativeness of the samples.

The study was carried out among adults aged over 18. Data for setting quotas for the different online panels came from comScore, which uses a range of data sources, including the NRS for the UK, the Estudio General de Medios (EGM) for Spain, and its own proprietary studies for all other markets.

Members of Toluna's access panel were screened to meet age and gender requirements. Respondents were invited to participate using a random online sampling approach to ensure a representative sample. The following methods were used:

- Email invitation via random sampling from the panel, within qualifying age bands.

- Real-time sampling, allowing visitors to the Toluna website to access the screeners and participate (if they qualified).

- Toluna also allow respondents who have screened out or quota failed an alternative survey to be directed into the live survey via a router, based on their demographics and what is still open in terms of quotas.

Toluna sampled its panel by selecting email addresses randomly within the market and demographic quotas required, taking account of predicted response rates by target demographic, and country, to avoid over-contacting panellists and to ensure that a bias was not introduced in the responses. The

sample itself was then automatically randomised for potentially-qualifying individuals. A twenty-five minute self-completion web-based survey was completed by all respondents in each market.

Quotas

Quotas of 1,000 interviews per market were set to match previous waves and at least 1,000 interviews were completed per country.

Quotas were set to reflect the age and gender profile of internet users in each market of consumers. The data were weighted using figures published by ComScore.

Figure 2   Achieved sample, by nation and demographics

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	SWE
Male	481	505	532	555	488	474	507	512	490
Female	521	531	479	462	511	543	500	496	505
18 – 24 yrs	121	108	101	93	115	82	105	85	120
25 – 34 yrs	161	151	152	181	182	116	185	161	144
35 – 44 yrs	175	194	201	211	169	172	189	224	147
45 – 54 yrs	169	193	174	166	166	158	172	194	170
55 – 64 yrs	160	163	141	146	171	126	157	147	157
65+ yrs	220	229	243	223	197	365	200	201	262

Statistical significance

Demographic quotas were employed to match internet use in each market. Results were tabulated and significance testing (at 95% confidence) was applied.

Statistical significance is indicated by the use of directional arrows on some of the figures in the report. An upward arrow indicates a significantly greater proportion and a downward arrow indicates a significantly lower proportion (see individual figure footnotes for details of years/sub-groups being compared).

Access panel

The 2017 survey used Toluna's access panel. The panel includes the following number of members in each of the relevant markets:

Figure 3   Toluna panel member volumes

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	SWE
Members (000s)	672	542	549	222	3,057	342	224	246	64

Panel members were recruited from a variety of sources, using a 'double opt-in' procedure. The process was as follows:

- Step 1 - A prospective panellist completes a panel registration form, which includes contact and demographic information (first opt-in).

- Step 2 - An automatic email is sent to the prospect, requesting verification of their panel registration by clicking a link that confirms their log-in details.

- Step 3 - Once the prospect has clicked the link (second opt-in), he or she is officially a panellist and is presented with an opportunity to complete additional profiling. Another automatic email is sent that includes the panellist's account log-in information for future reference by the panellist.

For this survey, all panellists completing the survey were paid a small incentive payment for their time.

Appendix C: comScore

Introduction

The UK Online Measurement Company (UKOM) was formed in 2009 with a mandate from the advertising industry to establish measurement standards for digital media. In 2011, comScore was appointed as the sole data supplier for UKOM on contract extending to March 2018.

The Internet and online content chapter predominantly draws from three comScore sources. For analysis of laptop and desktop computer internet activity we use comScore MMX, which employs comScore's Unified Digital Measurement methodology, explained below. The comScore MMX panel excludes Apple Mac computers apart from in the US where Mac pannelists' data was introduced in June 2016. Census-level activity is captured from both PCs and Apple Macs in all MMX markets.

For analysis of mobile internet activity, we use comScore Mobile Metrix. In the UK, the US, Spain, Italy, France and Germany, comScore Mobile Metrix uses comScore's Unified Digital Measurement methodology, with a panel of smartphones. In the UK and the US, the comScore MoMX panel includes Android smartphones, Iphones and Ipads , while in Italy, Spain, France and Germany the panel only includes Android smartphones. Japan and Australia comScore Mobile Metrix is currently informed only from census-level activity on publishers' digital content.

For analysis of internet activity across platforms, we use comScore MMX Multi-Platform which provides metrics on desktop and mobile video.

Video

VMX measures across the entire spectrum of web surfing and buying behaviour, including details of streaming media consumption. It uses the same UDM methodology that is used in MMX to combine the detail of person-centric panel insights with the coverage of census¬-based, site-centric or app-based video measurement. VMX uses the same dictionary as MMX. VMX reports streaming, progressive download and ad videos on PCs (home and work). Streaming requires a live client/server connection maintained during the transmission, while progressive download covers videos that the user downloads for playback and are usually viewed as they are downloaded. Both user-initiated and auto-launched videos are counted, and the video must play for more than 3 seconds to be counted.

Unified Digital Measurement

comScore's Unified Digital Measurement (UDM) methodology combines panel and census measurement techniques to measure digital audiences. UDM uses comScore's global measurement panel to determine audience reach and demographics. Census-level activity is captured from publishers' digital content, such as on websites, videos, and computer and mobile applications. comScore combines census-level data with those captured from the panel, to help provide a more accurate view of audiences and their consumption habits. This approach allows comScore to capture the most accurate consumption activity from publishers, and attribute this to audience demographics in a way that is not affected by cookie deletion, blocking, or rejection.

Metrics

Throughout the report, we refer to a number of metrics, defined below:

Unique audience – the total number of unique persons who visited a specific website or used a specific application at least once in a given month. Persons visiting the same website more than once in the month are counted only once.

Active audience – the total number of people who visited any website or used any application at least once in a given month.

Digital audience – the active audience across all platforms (laptop/desktop computers, mobile phones and tablets, for those websites that are tagged in comScore's census network).

Active reach – the unique audience of a website as a proportion of the active audience.

Time spent per month – the average time spent browsing a website per unique visitor per month

Dictionary

Each of the entities reported by comScore is attributed to a level in comScore's Client Focused Dictionary. Several entities (including apps) can exist within one service (e.g. BBC Sport and BBC iPlayer) and comScore's dictionary sets out how these entities are structured and related to each other. ComScore's clients define how their brands and websites appear in reports according to this dictionary. All comScore reports use the same six-tiered dictionary structure, as explained below:

Property [P] - The highest level of reporting within the dictionary. Properties represent all full domains (i.e. felmont.com), pages (i.e. sports.felmont.com/tennis), applications or online services under common ownership or majority ownership for a single legal entity. A property may also contain any digital media content that is not majority-owned but has been legally signed over for reporting purposes by the majority owner.

Media Title [M] - A Media Title is an editorially and brand-consistent collection of content in the digital landscape that provides the marketplace with a view of online user behaviour. This may represent a domain, a group of domains, online service or application.

Channel [C], SubChannel [S], Group [G] and SubGroup [SG] - Within a Media Title there may be grouped URLs of editorially consistent content that make up a Channel. For some of the largest Media Titles, Channels themselves may be broad, and Subchannels,Groups and Subgroups within the larger Channels may prove useful for categorisation within the comScore Dictionary.