



# Public Service Broadcasting: Annual Report 2015 Annex

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 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 portfolio channels: BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. BBC HD and BBC One HD has been excluded from 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. 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 is provided to Ofcom by the PSBs as part of their annual returns.

### Commercial PSB portfolio channels

Output data has been collected for the following commercial PSB portfolio channels: CITV, ITV2, ITV3, ITV4, 4Seven, E4, More4, Film 4, 5\* and 5USA.

### Spend data

Programme spend represents the total cost of production or acquisition, including rights costs but excluding third party investment which is provided separately. 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 2014 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. 2014 data reflects programmes broadcast during 2014.

## **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.

## **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, 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.
- Education and factual programmes for pre-school children.

## 1.2 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 and also the PSB portfolio channels where applicable. Figure 1 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 and channel share. 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 1 Definitions: BARB channel classifications**

Main five PSB channels	BBC portfolio channels	Commercial PSBs' portfolio channels			
		ITV portfolio channels	Channel 4 portfolio channels	Channel 5 portfolio channels	Multichannels
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	Channel 5+24	
	CBBC	ITV4+1	Film4+1		
	BBC Olympics channels	CITV	4Music		
	BBC red button channels	ITV Encore	4seven		
		ITV Encore+1	Channel 4 Olympics channels		
		ITVBe			
		ITVBe+1			

Channels include HD variants where applicable

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

## 1.3 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 2 and 3 below show the BARB definitions and the specific PSB genre groupings used in this report.

**Figure 2 Definitions: BARB genre classifications**

Note: Genres highlighted bold represent PSB genres

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

**Figure 3 Definitions: BARB genre classifications**

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



## 1.4 PSB Tracker

This section outlines the current methodology used in 2014 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 2014, a total of 3,158 interviews were conducted (1,687 in England; 526 in Scotland; 473 in Wales; 472 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 between March and December 2014.

Unless stated otherwise, analysis is based on self-defined regular viewers of each channel

### Quotas

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+.

An additional Welsh boot survey was conducted among respondents living in Wales who watch S4C and an additional Scottish boost survey was conducted among respondents living in Scotland who watch BBC Alba.

### 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 4.

**Figure 4 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*** It shows high quality comedy made in 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
Distinctive****	The style of the programmes is different from what I'd expect to see on other channels

\* Statements added to the PSB Tracker for 2007

\*\*Statements changed within the PSB Tracker in 2008

\*\*\*Statement changed within the PSB Tracker in 2011

Statement new in 2014\*\*\*\*

Only asked for importance in 2014 \*\*\*\*\*

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 2014**

In 2014, slight amendments were made to the questionnaire to address gaps identified in the data collection. A number of statements were added to the purposes and characteristics

New statements

- i) Purpose statement – it shows high quality comedy made in the UK
- ii) It shows different parts of the UK including England, Northern Ireland, Scotland and Wales.

## **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 6 to 8), 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 5 Changes in 2011**

Pre 2011 statement	Notes on pre 2011 statement	2011 onwards statement	Notes on 2011 onwards statement
<i>Its (regional)/ news programmes for people in Scotland/ Wales/NI provide a wide range of good quality news about my area/ Scotland /Wales, NI</i>	Statement was customised to nation.  “regional” and “my area” only used in England.	<i>Its regional news programmes provide a wide range of good quality news about my area.</i>	Same statement used across all nations.
<i>It portrays my region (IN ENGLAND)/Scotland /Wales/NI well to the rest of the UK</i>	Statement customised to nation.  “my region” used in England instead of nation’s name	<i>It portrays my region (IN ENGLAND)/Scotland /Wales/NI fairly to the rest of the UK</i>	Only change was that “well” was changed to “fairly”
<i>It shows enough new programmes, made in the UK</i>		<i>It shows new programmes, made in the UK</i>	Only change was that “enough” was removed
<i>Provides a wide range of high quality and UK made programmes for children</i>	Asked as part of main statement bank		Moved to later in the questionnaire.
<i>Provides a wide range of high quality and UK made programmes for <b>older</b> children</i>	Not asked	<i>Provides a wide range of high quality and UK made programmes for <b>older</b> children</i>	Asked only of parents of 12-15 year old Channel 4 viewers

**Figure 6: 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 7: 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 8: Removed Statements**

<b>Statements to be removed</b>
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 9 below shows the results against those of previous years PSB Tracker survey.

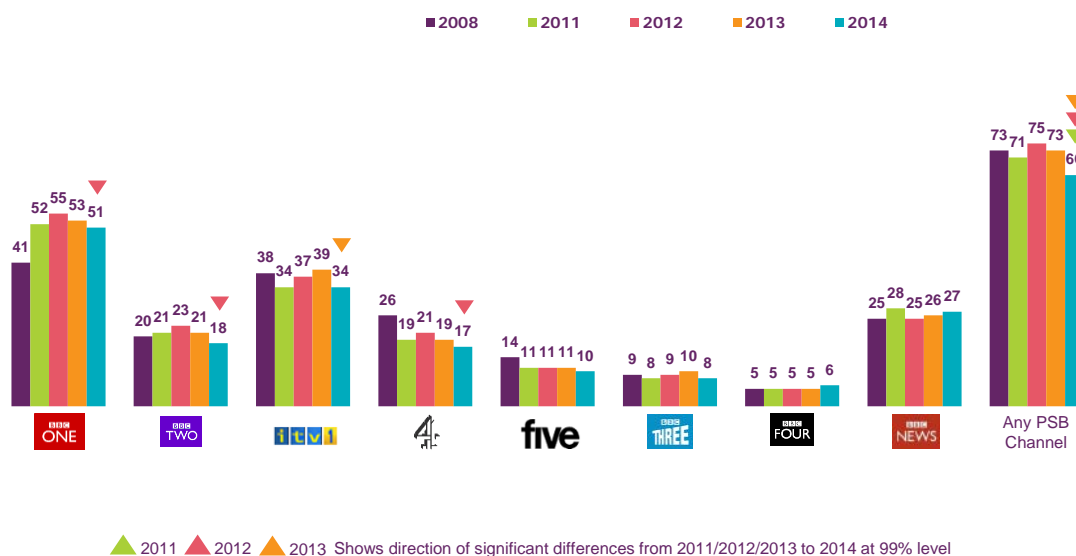
After consideration and analysis, it has been decided to retain the new questionnaire structure going forward as it removes an element of priming the respondents. If asked how regularly a channel is watched and then immediately the frequency, respondents would measure their first response based on the 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.

The changes in methodology mean that the historic data is not directly comparable to that from 2011 onwards

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 viewers 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.

As a result of the reweighting the reweighting, the figures for 2007, 2008, 2009, and 2010 are different to those previously published for these years. Also differences between results from 2011 onwards and previous years' may not be real changes, due to the change in methodology, or a combination of factors and due to the complexities of the changes to the methodology and questionnaire, the reweighting does not cover all differences between the datasets but allows sanity checking of any significant change

**Figure 9: The Proportion of Respondents who are self-claimed regular viewers (after re-weighting 2007, 2008, 2009 and 2010 data)**



Base: All respondents (6845, 3109, 3025, 3028, 3158)

## 1.5 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.

### 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.