
Media Nations

Annex 1: Methodologies

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Research survey methodologies

Ofcom Technology Tracker

The Technology Tracker is a survey run once a year (face-to-face in-home) with c.3,900 adults aged 16+ in the UK. Due to the Covid-19 pandemic, the existing face-to-face methodology of Ofcom's Technology Tracker had to be adapted this year, and an approach of post-to-web and post-to-paper was adopted for the main survey. It provides us with an understanding of consumer attitudes and behaviour in the UK communications markets, helping us to monitor change. The data collected is weighted to the profile of UK adults. The main Technology Tracker survey provides data on:

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

In addition to the main Technology Tracker survey, a supplementary CATI (computer-assisted telephone interview) omnibus survey was commissioned, to provide Ofcom with statistics that are not easily gathered using other methodologies. The CATI omnibus survey was conducted with c. 3,100 adults aged 18+ living in the UK, and the data was weighted to the profile of UK adults. It provides data on:

- access to devices;
- access to the internet;
- the number of each type of device in the household;
- the extent to which children in the household had access to appropriate devices for their schooling requirements; and
- how children's lack of access to appropriate devices was managed.

Ofcom News Consumption Survey

The News Consumption Survey is a survey run in two waves each year, among adults aged 16+, that usually uses a mixed face-to-face and online methodology. Due to the Covid-19 pandemic, the existing methodology had to be adapted this year, so face-to-face interviews were replaced by telephone (CATI) interviews. As a result of these enforced methodological changes, the adults' data reported this year is not comparable to data reported in previous years.

The adults' survey was carried out in two waves: in November-December 2020 and February-March 2021, during the second and third UK lockdown periods, with 3,327 online panel interviews and 1,278 CATI interviews collected in total. Due to differences in the questionnaire and differences in how respondents answered questions about individual news sources between the two survey methods used, the combined adult data is only used to show platform level data. All other adults' data is based on the online sample only. The data is weighted to correct for over-representation in

the nations, with weights applied to age, gender and SEG within Nation to match known population profiles.

Ofcom Podcast survey

The podcast research was a survey conducted by Populus in March 2021. Using their online panel, c. 1,000 adults were recruited which included 500 non podcast users, 160 regular (weekly) users and 340 occasional users. Regular podcast users were then targeted via boost interviews in order to reach 1,000 regular users, overall.

Respondents completed a questionnaire on their behaviours and attitudes related to podcasts. The questionnaire and data tables are available on Ofcom's statistical release calendar 2021.

The sample was nationally representative and targets for quotas were set on age, gender, region, ethnicity and social grade.

Ofcom Audio survey

The audio survey was conducted by Populus in March 2021 using their online panel via the online omnibus, reaching a 2,000 nationally representative sample and boosting to reach 150 respondents in each of the UK Nations. Invitations to complete the survey were sent out on a nationally representative basis, aligned with age, gender, region and social grade, to ensure that we achieved a good demographic spread. The questions were placed in first position on the omnibus.

Respondents completed a questionnaire on their behaviours and attitudes related to different audio platforms and providers.

Digital-i UK

Digital-i UK provide Netflix and Amazon Prime Video viewing measurement. Digital-i retrieves the viewing history data from each of the SVoD services their panellists aged 18-64 subscribe to. Title data is matched using API.

Comscore

Comscore is an organisation that provides online audience measurement. Some of its online media audience measurement products in the UK is endorsed by UKOM from 2012-2020, the body with a mandate from the advertising industry to establish measurement standards for digital media. Comscore uses its unified digital measurement methodology which combines both panel and census measurement techniques to obtain fully unified digital audience measurement statistics.

The Insights Family UK

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

TouchPoints

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

It typically has a sample of approximately 6,000 adults aged 15+ across Great Britain. However, in 2020 due to the country going into lockdown in March the results of the survey were split with TouchPoints providing pre-lockdown diary data for the 4,130 respondents who completed from 14 January 2020 through to 23 March 2020 when the first full lockdown commenced. Lockdown data was provided for 2,253 respondents who started their diaries on 17 March so one or more of the diary days was completed on or after the first lockdown started in 23 March 2020. In our report we have referred to the two different data sets in 2020 as TouchPoints 2020 (pre-lockdown)' and 'TouchPoints 2020 (lockdown 1)'.

In 2021 the survey has again been split into two waves, with the first wave taking place between January and March with a sample of 2,192 adults (referred to as 'TouchPoints 2021 W1' in the report). The second wave will follow later this year.

Ampere Analysis

Ampere is a data and analytics firm. We reference various data points from its research, which from a research survey point of view includes consumer profiling and polling about media usage and consumption patterns. We also make use of Ampere's financial and KPI analysis of company performance within the pay TV and online video sectors, and its title-by-title coverage of on-demand services' catalogues.

TV output and spend analysis

PSB channels

Wherever possible, historical data have been provided for BBC One, BBC Two, ITV, ITV Breakfast, Channel 4, Channel 5 and the BBC's portfolio channels: BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. BBC HD and BBC One HD have been excluded from the analysis in the report, as much of their output is simulcast from the core BBC channels and therefore would represent a disproportionate amount of duplicated broadcast hours and spend. Please refer to individual footnotes and chart details indicating when a smaller group of these channels is being reported on.

ITV includes ITV Breakfast unless otherwise stated. Note: GMTV became Daybreak during 2010 and then Good Morning Britain in 2014; the data relating to both services are labelled ITV Breakfast in the output and spend analysis. Data for the PSB channels are provided to Ofcom by the PSBs as part of their annual returns.

BBC portfolio figures include BBC Three until it ceased broadcasting as a linear channel on 15 February 2016.

The nations reports look at content broadcast across the national variants of BBC One and BBC Two (and since 2019, BBC Scotland in the Scotland report), as well as the holders of the Channel 3 licenses in each nation. In addition, the Scotland report contains analysis on BBC ALBA while the Wales report contains data on S4C's provision.

Commercial PSB portfolio channels and online services

Despite not being designated PSB channels, we also provide information on content broadcast across the commercial PSB portfolio channels and their online services. The commercial PSB channels in 2020 were:

- **ITV:** ITV2, ITV3, ITV4, ITVBe and CITV
- **Channel 4:** E4, More4, Film4, 4Seven, 4Music, Box Hits, Kerrang!, Kiss, Magic and The Box
- **Channel 5:** 5USA, 5STAR, 5Select and Paramount Network

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

From 2019, 4Music, Box Hits, Kerrang!, Kiss, Magic and The Box have been included as part of Channel 4's portfolio following its full acquisition of The Box Plus Network.

Spend data

Programme spend represents the total cost of production or acquisition, including rights costs but excluding third-party investment. In the case of commissions, it represents the price paid to the independent producer (and therefore includes a mark-up on production costs).

The data and information expressed in this report have been adjusted for inflation. It is important to adjust for inflation when comparing nominal data at different points in time because with inflation, increases in nominal figures may simply reflect higher prices rather than increased production or purchasing power. For example, if a book cost £5 ten years ago, but £10 today, we would say its price has risen 100% in nominal terms. But had inflation risen by 100% at the same time, halving the value of money, we would say that the price had not moved in real terms.

Trend data showing programme costs over a number of years are given in 2020 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. 2020 data reflect programmes broadcast during 2020.

Output hours

Definition of peak time

The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three (until it ceased broadcasting as a linear channel) and BBC Four, peak time runs from 7pm (when broadcasting starts on these channels) to midnight, except where otherwise stated.

Definition of slot time versus running time

Output hours are either based on slot time or running time. Slot time includes advertisements, sponsorship breaks and promos whereas running time excludes these minutes from programme output hours analysis. The PSB channels provide their data in slot times with the exception of nations' and regions' output, where running times are provided.

Genre definitions

The output data provided by the broadcasters follow a set of programme genre definitions, as outlined below and agreed with broadcasters in 2006.¹ Please note that these genres are defined for our monitoring and reporting purposes, and do not necessarily correspond to definitions used in broadcasting legislation, such as the 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.

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

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.

Religion & Ethics

- All forms of programming whose focus is religious belief, for example: programmes intended to provide religious inspiration through words and/or music, and informational programmes explaining doctrine, belief, faith, tenets, religious experiences or topics providing a religious world view.
- Coverage of religious acts of worship of all faiths.
- Life experience: moral, ethical, spiritual – exploring one or more of the following issues at some point in the programme: (i) a recognisable religious perspective forming a significant part of the overall narrative; (ii) an exploration of people's daily lives whose attitudes could be said to be informed by a religious background or tradition; (iii) an exploration of people's perception of, and attitudes to, philosophies which address the big questions of life that affect them. These must demonstrate an approach that bears in mind a religious faith/belief context.

Education

- Programmes with a clear educational purpose, usually backed by specially prepared literature publicised on screen and in other appropriate ways. Includes programmes for Schools, BBC Learning Zone and Open University programmes.
- Programmes reflecting social needs and promoting individual or community action. Also includes Campaign weeks on particular subjects, e.g. bullying, drugs.

Factual

All types of factual programmes, included in the genres listed below.

Specialist Factual

- History – programmes about historical times or events, including programmes about archaeology
- Nature & Wildlife – natural history and programmes about environmental issues.

- Science & Technology – programmes about scientific issues, new discoveries, medical matters and new technological developments
- Business & Finance – programmes about business/financial issues and developments

General Factual

- General factual programmes, including consumer affairs.
- Lifestyle programmes, hobbies and leisure interests, including makeover shows.
- Daytime magazine programmes and talk shows
- Coverage of special events, not generated by the broadcaster, including commemorative events, royal events.

Factual Entertainment

- Popular factual material, including reality shows, docu-soaps and other Factual Entertainment.

Drama

- All drama including comedy drama and TV movies but excluding soaps which are classified separately.
- Docu-drama – based on reality, telling the story of actual events.

Soaps

- Drama programmes with a continuous storyline and fixed cast, normally with more than one episode each week and shown every week of the year and usually (but not necessarily) of 30 minutes duration.

Films

- All feature films that have had a prior theatrical release including films commissioned by the broadcaster.

Entertainment

- All forms of entertainment programme, including panel games, chat & variety shows, talent contests
- Quiz and game shows
- Pop music video shows
- Contemporary music – coverage of popular music events and performances, such as OB concerts or as-live studio-based shows.

Comedy

- All forms of scripted comedy, satire, stand-up, and sketch shows

- Situation comedy – dramatised entertainment in a humorous style, usually with a fixed cast and generally of 30 minutes' duration.

Sport

- All forms of sports programming, including coverage of sporting events.

Children's

- All types of programmes designed for a children's audience, including:
 - Drama;
 - Entertainment shows, including weekend magazines and animations and cartoons, including puppets which are designed for a children's audience;
 - General information programmes and news for children; and
 - Education and factual programmes for pre-school children.

Definitions

- **First-run UK originations** – Programmes commissioned by or for a licensed public service channel with a view to their first showing on television in the United Kingdom in the reference year.
- **Network/ non-network programming** – Network programming is shown by the PSB channels across the UK, whereas non-network programming is nations' and regions' programming that is shown only in specific areas of the UK.
- **Daytime** – 6.00am-6.00pm
- **Peak time** – 6.00pm-10.30pm. For BBC Three and BBC Four, peak time runs from 7.00pm to midnight.

TV and AV consumption analysis

Total AV consumption

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

There are currently four main inputs:

1. **BARB industry data:** this provides total TV screen time and sub-components for live television, time-shifted television up to 28 days, DVD usage, games console playing, non-linear broadcaster output and all other TV usage.
2. **BARB four screen measurement:** this is the total online minutes to broadcaster online players to PCs, tablets and smartphones. It is based on census data that are generated by software code embedded in TV Player apps.
3. **TouchPoints:** this provides device profiling data only for subscription on-demand and broadcaster on-demand usage, as well as a ratio of YouTube to other online video content and a split of BARB time-shift between recorded content and broadcaster on-demand on the TV set. There are no absolute numbers from TouchPoints included in the analysis.
4. **Comscore:** this provides video viewing data from PCs, tablets and smartphones for YouTube.

Other points:

- BARB has previously estimated that extended PVR playback provides around 1.3% of additional TV in PVR homes. This viewing has been added to recorded viewing from the available pool of unmatched viewing.
- Categories excluded from this analysis are cinema viewing and consumption of billboard and outdoor advertising video.

TV viewing figures – BARB

The data are provided by the Broadcasters' Audience Research Board (BARB), a nationally representative panel of approximately 5,300 homes across the UK providing the official broadcast TV measurement for the industry.

Analysis is based on viewing to scheduled TV, such as programmes listed in TV listings magazines or on electronic programme guides (EPG), on TV sets. Unless otherwise stated, figures quoted are for the standard seven-day consolidated viewing. This includes viewing of these programmes at the time of broadcast (live) and from recordings such as on DVRs and through catch-up player services (e.g. apps on smart TVs) up to seven days after first broadcast (known as time-shifted viewing). Viewing of broadcast TV through all devices attached to the TV set including computers, streaming devices, and set-up boxes are included. Most figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency. It is clearly stated in the report when other age breakdowns have been used.

As well as the industry standard consolidated viewing described above, the report also includes BARB analysis of total TV screen time that includes several measures that are not currently part of

the standard reporting. This includes time-shifted viewing up to 28 days after broadcast and a category of 'unmatched viewing'. Unmatched viewing is to broadcast content beyond 28 day. This includes everything when the TV is in use, but content cannot be audio-matched or otherwise identified. It includes gaming, viewing of DVDs/box sets/archives, SVoD, time-shifted viewing beyond 28 days, apps on smart TVs and navigating EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded. Unmatched viewing has been reported by BARB since July 2013.

The BARB analysis focuses on the changes to viewing of broadcast TV overall and the performance of the PSB channels and their portfolio of channels.

The viewing metrics used in the analysis are hours/minutes of viewing, average weekly reach as a proportion of the total universe, channel share and channel profile.

BARB analysis has been taken from the AdvantEdge TV analysis software. Data presented in our other historical reports prior to 2018, such as the PSB Annual Research Report or the Communications Market Report 2017 was extracted from a different TV analysis tool, InfoSys+. There may be minor differences compared to previously presented analysis.

Definitions

Average daily minutes – average viewing time spent watching TV per person, per day.

Audience share/share of viewing – the percentage of the total TV audience watching a channel, time slot or programme across an analysis period. For example, a share of 22% for a given channel would mean that of all viewers watching TV across the period, 22% watched the channel and the remaining 78% were watching other channels. On a programme basis, a 48% share would mean that of all the viewers watching television in the slot that the programme was being transmitted, 48% were watching the programme.

Average weekly reach – the percentage of the total TV population who watched any TV or a channel in a typical week. Data can also be expressed in 000s. There are various ways of defining the amount of viewing an individual must have done in order to be counted as having been reached. The BARB definition is for this to be at least three consecutive minutes while Ofcom defines this to be at least 15 consecutive minutes, unless otherwise stated.

Audience profile – the audience profile shows how a main audience category is divided into its subcategories (such as age or socio-economic group) in percentage terms. For example, if a programme achieves an Adult 16-34 profile of 10%, this means that 10% of adult viewers were aged 16-34, while the other 90% were 35+ Adults.

Average audience – a programme audience is the average of all the minute audiences covered by the programme transmission, excluding any commercial breaks and promotions.

All PSBs – All PSBs include the main five PSB channels- BBC One, BBC Two, ITV (which includes ITV, STV, UTV and ITV Cymru Wales), Channel 4 and Channel 5 (excluding their +1 channels) as well as all BBC portfolio channels excluding BBC Alba (as this is not measured by BARB). S4C is not included as it is measured on a different base but it is reported on in our Wales Nation report.

Other third-party sources

Advertising Association / WARC Expenditure Report

Advertising Association (AA)

Audio Content Fund

British Film Commission

British Film Institute (BFI)

Broadcast

COBA: The Association for Commercial Broadcasters and On-Demand Services

Competition Markets Authority (CMA) Online platforms and digital advertising market study

Enders Analysis

House of Commons, DCMS Oral Evidence: The Future of Public Service Broadcasting

Official Charts Company

Group M

Internet Advertising Bureau (IAB Europe)

Oliver & Ohlbaum

PACT

IAB and PwC Digital Adspend Study 2020

Spark Ninety