
Media Nations

Annex 1: methodologies

Contents

Section

1. Research survey methodologies	1
2. TV output and spend analysis	3
3. TV and AV consumption analysis	8
4. Listening analysis: RAJAR	13

1. Research survey methodologies

Technology Tracker

The technology tracker is a face-to-face survey run once a year to c. 3750 adults. It provides Ofcom with continuous understanding of consumer behaviour in the UK communications markets, helping us to monitor change and assess the degree and success of competition. The data collected is weighted to the profile of UK adults, so the data are representative of adults aged 16+.

There are also nations splits, with samples of c. 500 for each of Scotland, Wales and Northern Ireland.

PSB Tracker

The PSB Tracker is conducted using a mixed methodology with online and CAPI face-to-face data collection. The sample was split 75% online / 25% face-to-face, with proportional quotas applied to each method. A total of 3,147 interviews were conducted (1,988 in England; 511 in Scotland; 406 in Wales; 242 in Northern Ireland).

Sample sizes for the devolved nations are higher than required to be UK representative, in order to allow robust reporting at nation level. Fieldwork for the 2017 PSB Tracker was undertaken in two waves: June and July 2017 and October and November 2017.

It provides Ofcom with continuous understanding of UK adults' overall satisfaction with PSB channels, and their opinions on the importance and delivery of a range of purposes and characteristics. The data collected is initially weighted to the profile of the UK adults, so the data are representative of adults aged 16+. Further details on the weighting can be found in the PSB tracker technical report on Ofcom's website <https://www.ofcom.org.uk/research-and-data/data/statistics/stats18>

Cross-platform Media Tracker

The cross-platform media tracker survey is conducted using mixed methodologies. The sample size is 2,386 adults aged 16+ split equally; 50% using online methodology and 50% using CAPI, face to face. The sample breaks down for the nations are as follows: England (1683), Scotland (237), Wales (247) Northern Ireland (219). Fieldwork is run continuously through the year to counter seasonality issues (April through in December 2017).

The data collected provide Ofcom with continuous understanding of UK adults' attitudes and opinions towards television and radio broadcasting, online and on-demand consumption, and related areas such as regulation and privacy. The data collected are weighted to the profile of UK adults, so they are representative of adults aged 16+.

TouchPoints 2017

TouchPoints 2017 is an annual survey commissioned by the Institute of Practitioners in Advertising. With a sample of approximately 6,000 adults 15+ across Great Britain it uses a seven-day diary to capture media consumption and other daily activities every half hour. In addition, it also uses a self-completion questionnaire which includes attitudinal statements.

2. 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, 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, online services and BBC iPlayer

Despite not being designated PSB channels, we also provide information on content broadcast across the commercial PSB portfolio channels their online services and BBC iPlayer. The commercial PSB channels in 2017 were:

ITV: ITV2, ITV3, ITV4, CITV, ITVBe and ITV Encore

Channel 4: E4, More4, Film4 and 4Seven

Channel 5: 5USA, 5* and 5Spike

From 2017, we have also included first-run UK-originated content made available exclusively on BBC iPlayer, ITV Hub, All4 and My5.

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 2017 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. 2017 data reflect programmes broadcast during 2017.

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 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 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.

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.

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

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 10.30pm.

3. TV and AV consumption analysis

Total AV consumption

This analysis uses industry measures wherever possible to enable a repeat assessment to be made in the future. There are currently four main inputs:

1. **BARB industry data:** this provides to total TV screen time and sub-components for live television, time-shifted television up to 28 days, DVD usage, games console playing and all other TV usage.
2. **BARB TV Player Reports:** this data 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 2017:** 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 Video Metrix data:** this provides online viewing data to PCs, tablets and smartphones for non-broadcaster video services; YouTube and XXX content (leading adult websites).

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.
- Total online minutes by device from BARB TV player report has been used alongside viewers per view device factors to turn device minutes into people minutes.
- 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 panel of approximately 5,100 homes providing the official broadcast TV measurement for the industry.

BARB analysis is based on viewing to scheduled TV programmes, such as those listed in TV listings magazines or on electronic programme guides (EPG), on TV sets. Unless otherwise stated, figures quoted are for the standard 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 programmes through all devices attached to the TV set including computers, laptops and tablets are included. Most figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency.

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 analysis focuses on the changes to viewing of TV overall, the performance of the PSB channels and their portfolio of channels and programme genres. Figure 1 shows the channel group definitions used in the Viewing report and Figure 3 shows the genre definitions used in the analysis.

The viewing metrics used in the analysis are hours of viewing, average weekly reach, channel share and channel profile. The dedicated programmes section focuses on total annual viewing hours and proportion of viewing to genres, as well the average audience size of individual programmes.

In addition, a section focusing on the viewing to local TV channels is contained within the main report. Figure 2 lists the local TV channels that are reported by BARB.

Changes to the BARB reporting system in 2010 allows 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 generated between January – June 2018.

BARB analysis has been taken from the *AdvantEdge* TV analysis software. Data presented in our other historical reports 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.

Figure 1: channel definitions

PSB channels		Commercial PSB's portfolio channels			
Main five PSB channels	BBC 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	5Star	
ITV	BBC News	ITV2+1	E4+1	5Star+1	
Channel4	BBC Parliament	ITV3	Film4	5USA	
Channel5	CBBC	ITV3+1	Film4+1	5USA+1	
	CBeebies	ITV4	More4	5Spike	
	BBC red button channels	ITV4+1	More4+1	5Spike+1	
	BBC HD	CITV	4Music	5Select	
	BBC Olympics channels	ITVBe	4seven		
	BBC World	ITVBe+1	Channel 4 Paralympic channels		
	BBC Choice	ITV Encore	Film4 Weekly		
		ITV Encore +1	Film4 World		
		ITV News			
		ITV Play			
		Men and Motors			

Channels include HD variants where applicable.

Figure 2: local TV channels measured by BARB

Channel Group	Channels	Start Reporting Date on BARB	End Reporting Date on BARB
Local TV Network	Estuary TV	20 April 2015	2 July 2017 (week 27)
	Latest TV	20 April 2015	2 July 2017 (week 27)
	Notts TV	20 April 2015	2 July 2017 (week 27)
	NVTV Belfast	20 April 2015	2 July 2017 (week 27)
	Sheffield Live TV	20 April 2015	2 July 2017 (week 27)
Made TV Network	Made in Bristol	20 April 2015	n/a
	Made in Cardiff	20 April 2015	n/a
	Made in Leeds	20 April 2015	n/a
	Made in Newcastle	20 April 2015	n/a
	Made in Liverpool	15 June 2015	n/a
	Made in Birmingham	13 June 2016	n/a
STV2	STV Glasgow (latterly STV City)	2 June 2014	n/a
	STV Edinburgh (latterly STV City)	12 January 2015	n/a
	Aberdeen*	26 April 2017	n/a
	Ayr*	26 April 2017	n/a
	Dundee*	26 April 2017	n/a
London Live	London Live	31 March 2014	n/a

Channel Groups are as of March 2018. *These channels were launched as part of STV2.

BARB Programme genre definitions

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. Figure 3 shows the BARB definitions and the specific genre groupings used in this report.

Figure 3: genre classifications

Genre label	Definition	Genre label	Definition
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: Generic	Films: Other	Cinema Films: US Cinema Films: Rest of World - Foreign Language Cinema Films: Rest of World - English Language Cinema Films: Bollywood Cinema Films: Generic TV Films: US TV Films: Rest of World - Foreign Language TV Films: Rest of World - English Language TV Films: Bollywood TV Films: Generic Other Films (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: Generic	UK Drama	Drama: Single Plays – UK Drama: Series/Serials - UK
National/ International News	News: National/International	UK Soaps	Drama: Soaps - UK
Leisure Interests	Hobbies/Leisure (All)	Drama: Other	Drama: Single Plays - Non-UK Drama: Single Plays – Generic Drama: Soaps - Non-UK Drama: Soaps – Miscellaneous Drama: Series/Serials - Non UK Drama: Series/Serials - Generic
Sport	Sport (All)	Children’s	Children (All)
		Comedy	Ent: Situation Comedy – UK Ent: Situation Comedy – US Ent: Situation Comedy - Rest of World Ent: Other Comedy Ent: Comedy Stand Up
Genre label	Definition		
All other genres	Arts: (all) Current affairs: (all) Documentaries: Natural History & Nature Documentaries: Science/Medical Education: (All) Party Political Broadcast: (All) Religious: (All) Cinema Films: UK TV Films: UK Music (all) News: Regional News: Generic Weather: National Weather: Regional Other: New Programme		

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 PSB families: all PSB channels and their portfolio channels, HD variants and +1 channels.

BBC Total, ITV Total, Channel 4 Total etc: viewing to the main channel including viewing to their +1 channels.

BBC family, ITV family, Channel 4 family, Channel 5 family: main channel and all portfolio channels combined.

4. Listening analysis: RAJAR

About RAJAR

RAJAR stands for Radio Joint Audience Research. It is the official body in charge of measuring radio audiences in the UK and is owned and controlled by the industry.

Sample

In order that small stations can be surveyed, the overall adult 15+ sample is about 100,000 each year, with each respondent only participating for one week.

The sampling is devised so that each station's sample is representative of the area it covers. The smallest sample for a station on RAJAR is 500 adults over 12 months, for stations with a TSA (Total Survey Area) under 300,000. The national stations report on a quarterly sample of approximately 25,000 adults.

Methodology

Participants in the survey are asked to complete a listening diary for one week. They are not asked to complete the task retrospectively (i.e. for the week before placement) – instead they are asked to start recording their listening as it happens for the week ahead. In general, only one respondent is recruited per household and quotas are set to ensure the best possible demographic representation of the area.

Diary placement is continuous throughout 50 weeks of the year, excluding the Christmas and New Year holiday period.

The respondent is asked to keep a listening diary for one week, detailing for each quarter hour, which station they listened to, where, and on which platform. Only live listening is measured.

The listening diary is recorded via online, paper or a mobile app.

The interviewer conducts a procedure in which each respondent is asked to sort through a set of cards with the names of radio stations available in the area. This is then used to personalise the respondent's diary.

The diary also comprises a self-completion questionnaire which covers media consumption including television viewing, newspaper readership, listening to podcasts and via mobile phone.

See www.rajar.co.uk for further details.

Definitions

Weekly reach – The number of people that listen to a radio station within at least one quarter-hour period over a week. Respondents are instructed to fill in a quarter-hour only if they have listened to

the station for at least 5 minutes within that quarter-hour. Between 24.00-06.00, listening is recorded in half-hour periods.

Share of listening - The percentage of all radio listening hours that a station accounts for within its transmission area. This can be calculated for any target market across any area.

Average hours per listener - The average length of time that listeners to a station spend with that station. This is calculated by dividing the weekly hours by the weekly reach.

TSA (Total Survey Area) - The area within which a station's audience is measured. This is defined by the station using postcode districts as building blocks.