
Annex 1

Methodologies

Contents

Research survey methodologies	2
TV output and spend analysis	6
TV and AV consumption analysis	11
Other third-party sources	13

Research survey methodologies

Ofcom Technology Tracker

The Technology Tracker is a survey run once a year with c.4,000 adults aged 16+ in the UK. This year the tracker returned to face-to-face data collection, after the Covid-19 pandemic meant last year's methodology had to be adapted to a post-to-web and post-to-paper approach. For this reason, no trend comparisons are being made between 2022 and 2021 data. 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 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

Public Service Media (PSM) Tracker

The PSM tracker is a continuous annual survey, amongst c. 3,000 UK adults aged 16+. In 2021, fieldwork was conducted between 13th July and 17th December. It utilised a combination of push-to-web, push-to-telephone, online panel and river sampling methodologies. We surveyed 3,115 UK adults aged 16+ in total, including 2,140 in England, 313 in Scotland, 324 in Wales and 338 in Northern Ireland. Data are weighted to be nationally representative of the UK using mid-2020 population estimates, 2011 census, 2017 annual population survey. The aim of the survey is to help understand:

- Audience satisfaction with PSB services
- Delivery of PSB attributes
- Understand the reasons why audiences do not use certain PSB services
- Understand satisfaction and delivery for PSB BVOD services
- Understand PSB in the context of the media marketplace, including an assessment of satisfaction and delivery of selected online streaming services

Please note that the data from this tracker is not comparable to the previous PSB tracker, as a result of the redevelopment of the survey.

Ofcom News Consumption survey

In News Reports published from 2018 to 2020, the adult research was conducted using a mixed methodology, combining 50% face-to-face respondents and 50% online respondents. However, during late 2020 and throughout 2021 Ofcom was unable to conduct face-to-face research and used a combination of online and telephone research instead. We were able to conduct face-to-face research in March/April 2022 so the data used is from this period. In total, the face-to-face survey

achieved 1,086 interviews, with the nations over-represented during fieldwork. This data has been weighted to correct for this over-representation, with weights being applied by age, gender and socio-economic group (SEG) within nation, to provide a representative view of all UK adults. The online (1,706 interviews) and face-to-face data has been combined to provide a snapshot of opinion across both methodologies during March/April 2022. The 1,717 online interviews collected in November/December 2021 have not been included in the combined data.

The fieldwork for the majority of the data used in the adults' survey this year took place from the March 7th - 3rd April 2022.

Ofcom VoD survey

Ofcom commissioned this survey to explore use of and attitudes towards video-on-demand services. This was a quantitative survey among an online sample of 2,000 UK nationally representative people aged 13+ (with a boost to reach at least 150 respondents per nation), via Yonder's online panel. This survey was conducted in February 2022.

Ofcom Podcast survey

The podcast research was a survey conducted by Yonder in February 2022. Using their online panel, c. 1,000 adults were recruited which included 529 non podcast users, 160 regular (weekly) users and 352 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 2022.

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 Yonder in February 2022 using their online panel via the online omnibus, reaching a 2,272 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 provides 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 an API.

Ipsos iris

Launched in early 2021, Ipsos iris is the [UKOM endorsed currency](#) for the measurement of audiences of online content of UK adults aged 15+ who use the internet at least once a month.

Ipsos iris uses a hybrid methodology with several data sources including:

- A passive single-source panel of over 10,000 adults who use the Internet. Panellists install passive tracking software onto personally used digital devices (smartphones, computers, and tablets) that access the internet with data collected continuously. The panel is recruited to be representative of the internet population demographically, geographically and by device type usage.
- Census measurement of publisher websites and apps to collect visit measures for time spent and page views at a total level.
- A high quality [Establishment Survey](#) to produce universe targets. The Ipsos iris panel is then weighted to the internet population of UK adults aged 15+ and demographic sub-groups.
- External first-party data from accredited and approved sources with additional website or app level targets.

Reporting on daily and monthly data, all sources are fused together to create a synthetic dataset with more than one million records to represent the UK online infrastructure of websites and apps. These can be analysed and reported at many demographic and geographic levels. Due to this being a synthetic dataset, it is not possible to provide confidence intervals/ranges for extrapolated population estimates. However, it should be noted that all extrapolated population figures provided are estimates that will have some margin of error.

More detail on the Ipsos iris methodology can be found [here](#).

For the reports used here, we used Ipsos iris monthly data from March 2022. The passive panel for this month covered a continuously measured sample of 10,991. The panel size by nation is below. Note that as this is a continuous panel so the reporting profile in other months will be similar.

Nation	March 2022 Ipsos iris panel size	%
England	9083	83%
Scotland	1042	9%
Wales	606	6%
Northern Ireland	260	2%
Total	10991	100%

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.

IPA 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. In 2020, however, lockdowns resulted in the survey being 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 our report, we have referred to the two different data sets in 2020 as TouchPoints 2020 (pre-lockdown)' and 'TouchPoints 2020 (lockdown 1)'.

From 2021, the survey has been split into two equal 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 covered June to September. The first wave of 2022 covered the period 12 January to 20 March 2022.

Ampere Analysis

Ampere Analysis is a data and analytics firm. We reference various data points from its research, including financial metrics within the pay-TV and online video sectors, and content hours in on-demand catalogues, segmented in various ways.

RAJAR

RAJAR is the official body responsible for measuring radio audiences in the UK. Fieldwork for the listening survey was suspended in March 2020 and resumed from Q3 2021 with a modified methodology, meaning comparisons with pre-Covid data should be treated with caution. For this reason, we have not included any data prior to Q3 2021.

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. (BBC Three was relaunched on broadcast TV in February 2022 but data for the initial relaunch period is not captured in this year's report.)

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 2021 were:

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

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, The Box, Box Hits, Kerrang!, Kiss and Magic 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 (AA) / WARC Expenditure Report

BPI

British Film Institute (BFI)

Broadcast

ERA

Group M

Internet Advertising Bureau (IAB Europe)

IAB and PwC Digital Adspend Study 2021

Official Charts Company

Pact