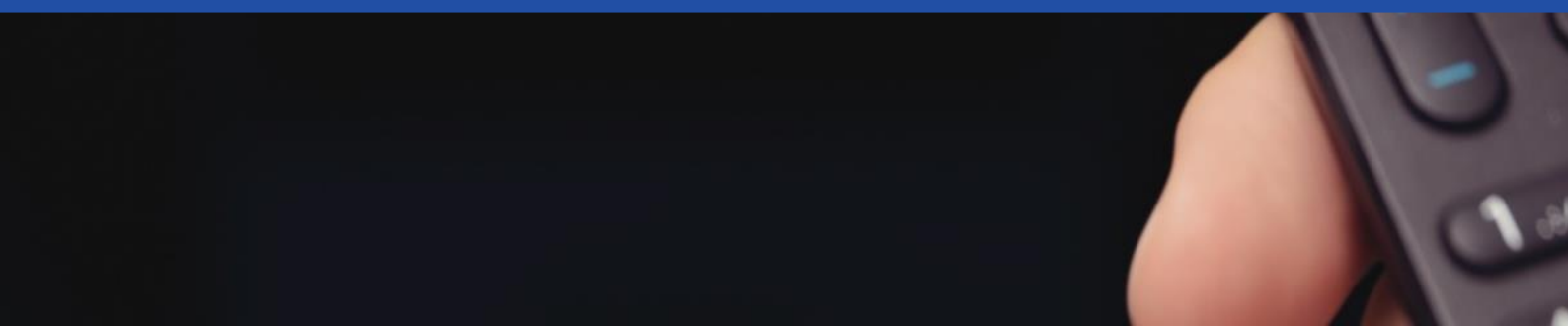
Ofcom: Public Service Media Tracker 2024

Technical Report



Preface

This document contains details of the methodology, questionnaire, quotas, sampling, and weighting for the 2024 Public Service Media (PSM) tracker study run by BMG Research on behalf of Ofcom.

Based on the public service purposes presented in the 2003 Communications Act, Ofcom developed a range of PSB purposes and characteristics in its first PSB review in 2005. The PSB channels (the BBC channels, ITV, Channel 4 and Channel 5) are expected together to fulfil these purposes and characteristics, although each PSB channel has a specific remit.

The PSB purposes and characteristics were put into everyday language for the PSM Tracker survey, which asks respondents to give their opinions on the PSB statements, both in terms of the importance and the delivery of these by the PSB channels. Other perceptions and attitudes towards PSBs, BVoDs and SVoDs are also captured.

This is the fourth year of the PSM tracker, which was developed in 2021 to reflect the changes in the media market, replacing the Public Service Broadcasting (PSB) tracker (last conducted in 2019). As a result, while 2024 data is comparable with 2023, 2022 and 2021, results are not directly comparable with 2019.

Methodology

In the years prior to 2021, the Public Service Broadcasting tracker had been conducted as an online and face-to-face blend, with fieldwork taking place in two waves.

In 2021, the methodology was changed from previous years to a 50:50 push-to-web and online panel approach, with the online panel being supplemented by river sampling and the push-to-web approach supplemented by a low connectivity boost and an option to complete via telephone. The same approach has been maintained since, and the table below demonstrates the split of sample across methods.

Method	Number of completes
Push-to-web: Letter to address followed by completing online	1,549
Telephone: Letter to address followed by completing over the phone	21
Panel: Stratified random sample of online panel	1,366
River sampling: Recruiting respondents via panels who are not full panel members	142
Total	**3,078**

The fieldwork period was from 19th February to 18th December 2024. It took the form of five online panel batches, plus one river sampling period and eight push-to-web batches, enabling a continuous period of fieldwork. A £10 incentive in the form of a voucher was used throughout the push-to-web fieldwork to encourage responses.

A total of 3,078 interviews were undertaken, including 2,110 in England, 346 in Scotland, 310 in Wales and 312 in Northern Ireland. Sample sizes at the devolved nation level were higher than the national proportion to allow for more confident estimates for each nation. A breakdown of the unweighted sample split by method is provided overleaf.

Category	Push-to-web	Telephone	Panel	River sampling
Total	50%	1%	44%	5%
GENDER				
Male	50%	0%	45%	5%
Female	50%	1%	44%	5%
AGE				
16-24	35%	0%	62%	4%
25-34	38%	0%	57%	5%
35-44	48%	0%	45%	7%
45-54	50%	0%	45%	5%
55-64	56%	1%	38%	5%
65-74	71%	1%	25%	3%
75+	48%	3%	46%	3%
SOCIAL GRADE				
ABC1	55%	0%	41%	4%
C2DE	43%	1%	50%	6%
REGION				
England	54%	1%	43%	2%
East Midlands	53%	2%	44%	2%
West Midlands	52%	1%	44%	2%
East	58%	1%	39%	2%
London	30%	0%	68%	1%
North East	60%	1%	26%	13%
North West	47%	0%	52%	1%
South East	60%	1%	38%	1%
South West	79%	0%	19%	1%
Yorkshire and the Humber	58%	1%	40%	1%
Scotland	46%	1%	52%	2%
Wales	45%	0%	44%	12%
Northern Ireland	38%	0%	43%	18%
ETHNICITY				
White	54%	1%	41%	5%
Ethnic minority	27%	0%	70%	3%

Quotas

No hard quotas were included as part of the push-to-web approach. In the online survey, quotas were set on age, gender, social grade, region/country, and ethnicity, which were updated throughout fieldwork to work in tandem with the push-to-web approach to ensure sample balance.[1]

Sample design

For the 'main' component of the push-to-web approach, the sample was drawn at a postcode level through stratification by Government Office Region, urban/rural designation, and IMD decile. Selection for each region was proportional to mid-year population estimates except for Scotland, Wales, and Northern Ireland which were purposefully oversampled.

For the 'low connectivity boost' component, the sample was selected by creating an index based on the available demographic indicators of low connectivity and selecting addresses at random within the upper decile of the custom index.

A letter was sent to each selected address inviting an adult in the household to take part in the survey. An initial reminder letter and a final reminder letter were sent to those who did not respond after two weeks and three weeks respectively.

A helpline option allowing respondents to complete the survey via telephone was available to all those who received a letter. The 'low connectivity boost' sample made this option more prominent, given these letters were targeted at respondents with a greater likelihood of having lower levels of connectivity. The table below sets out the numbers of low internet-use households that completed the survey after being sampled.

Level of internet use	Completes via 'push-to' components	% of total 'push-to' completes
No internet access at all	14	0%
Have access but don't use at home	5	1%
Use up to 5 hours per week	116	7%
Total	**135**	**9%**

There were also minimum targets set for certain groups, all of which were reached. See the breakdown overleaf.

Targets	Target (minimum)	Final total
English regions	100 per region	At least 100 in each region
Wales	300	310

[1] Ofcom set a number of additional minimum sample number requirements on groups such as Asian (Bangladeshi, Indian, Pakistani, Chinese & Other Asian) and Lesbian/Gay/Bisexual. These targets were monitored throughout.

Northern Ireland	300	312
Scotland	300	346
Over 65s with limiting condition	150	310
Lesbian/Gay/Bisexual	150	200
Black (African, Caribbean & Other Black)	100	117
Asian (Bangladeshi, Indian, Pakistani & Other Asian)	200	202

Weighting

For the 2024 wave the decision was made to adapt the weighting of results based on the release of all 2021 census data, across England, Wales, Northern Ireland and Scotland. Therefore the weighting differs from previous waves. The table below outlines the sources used for each 2024 weight and those used in previous years.

As Scotland did not measure approximated social grade in the latest census, the decision was made to retain the 2011 census data for this country's SEG weighting rather than stop weighting by approximated social grade.

Weight	2021, 2022, 2023	2024
Region within England	Mid-2020 population estimates	2021 census
Age by gender within each nation	Mid-2020 population estimates	2021 census
Social grade within each nation	2011 census	2021 census (except Scotland where 2011 census used)
Ethnicity within each nation	2017 annual population survey	2021 census
Educational attainment at a UK level	2017 16+ annual population survey	2021 census

The weighting process was used to adjust for any differences between targets and fieldwork numbers and to down-weight the devolved nations (which were oversampled to ensure a robust sample size for these countries) to make the sample nationally representative. The final weight had an effective sample size of 69%. While this is lower than previous years' effective sample size, it is understandable given that the sampling targets and weighting targets were based on different sets of population statistics.

It was felt important that the survey reflected the UK population as defined by the 2021 census. However, changes to the weighting profile mean that some caution should be taken when comparing the 2024 data to previous waves. Analysis suggests that tracking remains valid. Most weighting adjustments for the updated targets were minimal, as 2021 Census data closely matches the previous targets. However, education is an exception—the Census shows a noticeably higher proportion of people with no qualifications compared to the

2017 Annual Population Survey used before and therefore trend analysis by level of education is not reliable. A breakdown of the old and new weighting scheme can be seen overleaf.[2]

Region	Old weight	New weight	Difference
England	84.1%	84.2%	+0.1%
East Midlands	7.3%	7.3%	=
West Midlands	8.8%	8.8%	=
East	9.3%	9.4%	+0.1%
London	13.2%	13.0%	-0.2%
North East	4.1%	4.0%	-0.1%
North West	11.0%	11.0%	+0.1%
South East	13.7%	13.8%	+0.1%
South West	8.6%	8.7%	+0.1%
Yorkshire and the Humber	8.2%	8.2%	-0.1%
Scotland	8.4%	8.3%	-0.1%
Wales	4.8%	4.7%	-0.1%
Northern Ireland	2.8%	2.8%	=

Category	Old weights		New weights		Difference	
AGE	Female	Male	Female	Male	Female	Male
ENGLAND						
16-24	6.3%	6.7%	6.4%	6.6%	+0.1%	-0.1%
25-34	8.2%	8.4%	8.6%	8.1%	+0.3%	-0.3%
35-44	7.9%	7.8%	8.2%	7.8%	+0.3%	=
45-54	8.3%	8.1%	8.3%	8.0%	=	-0.1%
55-64	7.7%	7.5%	7.8%	7.5%	+0.1%	+0.1%
65-74	6.4%	5.9%	6.3%	5.8%	-0.1%	-0.1%
75+	6.1%	4.6%	6.0%	4.5%	-0.1%	-0.1%
SCOTLAND						
16-34	14.4%	14.6%	14.2%	13.9%	-0.2%	-0.7%
35-54	16.1%	15.2%	15.8%	15.0%	-0.3%	-0.3%
55+	21.3%	18.5%	21.9%	19.2%	+0.6%	+0.8%

[2] In these tables percentages are given to 1 decimal place.

WALES						
16-34	14.0%	14.8%	13.9%	13.9%	-0.1%	-0.9%
35-54	15.0%	14.4%	15.3%	14.5%	+0.3%	+0.1%
55+	22.1%	19.7%	22.4%	20.0%	+0.3%	+0.3%
NORTHERN IRELAND						
16-34	14.7%	15.2%	14.6%	14.7%	-0.1%	-0.5%
35-54	17.0%	16.1%	17.0%	16.2%	=	+0.1%
55+	19.6%	17.5%	19.8%	17.8%	+0.1%	+0.3%

Category	Old weights		New weights		Difference	
Social Grade X Region	**ABC1**	**C2DE**	**ABC1**	**C2DE**	**ABC1**	**C2DE**
England	53.9%	46.1%	56.2%	43.8%	+2.4%	-2.4%
Scotland[3]	50.3%	49.7%	N/A	N/A	N/A	N/A
Wales	47.2%	52.8%	52.5%	47.5%	+5.3%	-5.3%
Northern Ireland	45.5%	54.5%	50.6%	49.4%	+5.1%	-5.1%

Category	Old weights		New weights		Difference	
Ethnicity X Region	**White**	**Ethnic minority**	**White**	**Ethnic minority**	**White**	**Ethnic minority**
England	84.6%	15.5%	83.0%	17.0%	-1.5%	+1.5%
Scotland	95.2%	4.8%	93.8%	6.2%	-1.5%	+1.5%
Wales	95.5%	4.5%	94.6%	5.4%	-0.9%	+0.9%
Northern Ireland	98.0%	2.00%	97.0%	3.0%	-1.0%	+1.0%

Education	Old weight	New weight	Difference
Higher education/Degree or above	38.4%	33.6%	-4.7%
Non-degree level qualifications	52.4%	48.2%	-4.2%
None	9.2%	18.2%	+9.0%

[3] As highlighted earlier, Scotland did not measure approximated social grade in the latest census so the decision was made to retain the 2011 census data for this country's SEG weighting rather than stop weighting by approximated social grade.

In 2021, regression analysis was conducted on four variables to test for mode impact. This controlled for demographic factors and found that the mode of survey (panel or push-to-web) had either no impact or an extremely minimal driver of survey response depending on the variable. No weighting adjustments were necessary because the mode only had a very minimal impact on the survey response.

Category	Achieved %	Weighted	Unweighted sample size	Effective Sample Size (ESS[4])
Total	100%	100%	3,078	2,118
GENDER				
Male	48%	48%	1,466	1,041
Female	52%	51%	1,588	1,058
AGE				
16-24	10%	12%	311	257
25-34	15%	17%	465	352
35-44	16%	16%	497	339
45-54	15%	16%	474	341
55-64	18%	15%	546	350
65-74	14%	13%	438	271
75+	11%	10%	347	210
SOCIAL GRADE				
ABC1	63%	55%	1,932	1,435
C2DE	36%	44%	1,117	756
REGION				
England	69%	84%	2,110	1,645
East Midlands	6%	7%	184	137
West Midlands	7%	9%	212	155
East	8%	9%	238	177
London	11%	13%	334	277
North East	3%	4%	104	89
North West	9%	11%	271	223
South East	11%	14%	331	254
South West	7%	9%	207	171
Yorkshire and the Humber	7%	8%	229	170
Scotland	11%	8%	346	255
Wales	10%	5%	310	207
Northern Ireland	10%	3%	312	240

[4] Effective Sample Size (ESS) is an estimate of the sample size required to achieve the same level of precision as would be expected to be obtained by a simple random sample.

ETHNICITY				
White	86%	85%	2,648	1,814
Ethnic minority	14%	15%	417	295

Confidence interval

The table below illustrates the required ranges for different sample sizes and percentage results at a confidence interval of 95%.

Effective Sample Size	10% or 90% ±	20% or 80% ±	30% or 70% ±	40% or 60% ±	50% ±
2,118 (Total)	1.28%	1.70%	1.95%	2.09%	2.13%
1,645 (England)	1.45%	1.93%	2.21%	2.37%	2.42%
1,058 (Female)	1.81%	2.41%	2.76%	2.95%	3.01%
295 (Ethnic Minority Total)	3.42%	4.56%	5.23%	5.59%	5.71%

If 20% or 80% of a sample with an effective sample size of 2,118 gives a particular answer in 95 out of 100 cases, we would expect the "true" value to fall within the range of +/- 1.70 percentage points from the sample results.

Significant differences

When comparing two separate groups within a sample, the difference may be a "real" difference, or it may occur due to change (because not everyone within the two groups has been interviewed). To find whether a difference is statistically significant, we need the sample sizes of both groups and the numbers of those groups giving a certain answer. To get to a 95% confidence interval, the difference between the two % levels of answers must be greater than those given in the example table below.

Effective Sample Size comparison	10% or 90% ±	20% or 80% ±	30% or 70% ±	40% or 60% ±	50% ±
1,041 (Male) vs 1,058 (Female)	2.6%	3.4%	3.9%	4.2%	4.3%
257 (16-24) vs 352 (25-34)	4.8%	6.4%	7.4%	7.9%	8.0%

For example, to check whether an answer of 20% for male and 24% for female is significant, the difference has to be greater than 3.4%.

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