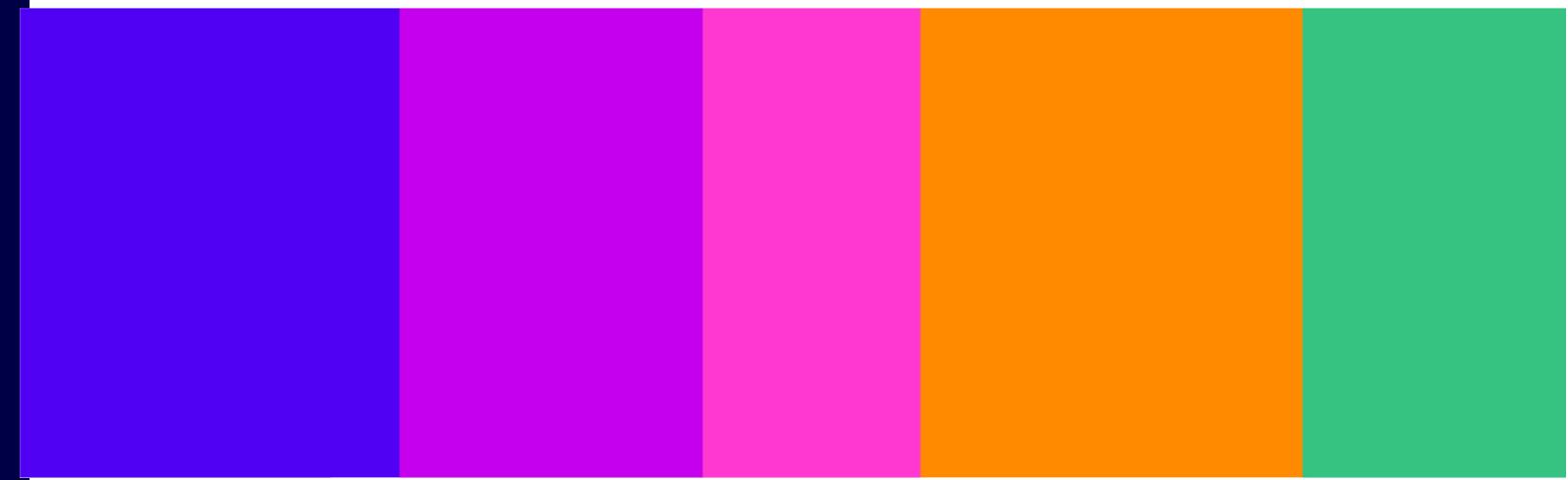


Annex

Methodologies

Published: 31 July 2024



Contents

Section

1. Ofcom research methodologies.....	3
2. Other research methodologies.....	7
3. TV output and spend analysis.....	8
4. TV and AV consumption analysis.....	13
5. Abbreviations.....	15
6. Other third-party sources.....	16

1. Ofcom research methodologies

Ofcom Audio Survey

The Audio Survey is a quantitative survey exploring behaviours and attitudes to different audio platforms and providers. Firstly, an online survey among a sample of 2,301 UK nationally representative people aged 16+ (with a boost to reach 150 respondents per nation) was conducted via Yonder's online omnibus. Fieldwork took place from 19 to 20 February 2024.

One question (Q1) was then placed on Yonder's telephone omnibus. This reached a 1,032 nationally representative sample in the UK aged 16+ with a 50% landline, 50% mobile approach. The data was then merged with the results of the online omnibus to provide a comprehensive picture of the audio landscape, inclusive of a non-online audience. Computer Assisted Telephone Interviewing (CATI) fieldwork took place from 21 February to 5 March 2024.

The aim of the Audio Survey is to help us understand:

- Use of radio and online audio providers
- Online audio content preferences
- Use of BBC services
- Awareness of BBC Sounds
- Impact of BBC Sounds on other audio listening
- Perceptions of audio services and importance of certain features

Please see the [Ofcom Statistical Release Calendar 2024](#) for the Audio Survey 2024 [technical report](#), [published data tables](#) and [questionnaire](#). Key findings from the survey are written up in our April 2024 on [Audio Listening in the UK](#).

Ofcom In-car Audio Survey

The In-car Audio Survey is a quantitative survey undertaken by YouGov on behalf of Ofcom. The survey was conducted online between 26-27 June 2024 using the YouGov bespoke online survey platform and panel.

YouGov interviewed a sample of 2,117 individuals aged 16+ in the UK. The data was weighted to be nationally representative of the UK 16+ population on age, gender and education level (interlocked), and overall, to the region and SEG profiles, using an online sample.

The core objective of this study was to better understand how drivers and passengers use audio features within their vehicle such as how they connect their smartphones to their vehicle, and how people use the different audio features within their vehicle.

Specifically, the key aims and objectives were to:

- Understand how drivers and passengers use their smartphones to connect to their vehicle while traveling.
- Explore the audio features available in UK adults' vehicles, how they are used, and investigate behaviours and attitudes around using audio features in cars.

Please see the Media Nations 2024 homepage under ‘other documents’ for the [In-car Audio Survey technical report](#), [published data tables](#) and [questionnaire](#).

Ofcom News Consumption Survey

The News Consumption Survey (NCS) is a bi-annual survey with fieldwork for 2024 taking place across two waves: from 6 November – 3 December 2023 and 26 February – 23 March 2024, reaching a sample of 5,466 nationally representative UK individuals aged 16+.

The NCS uses a combination of online and face-to-face research. In 2021 Covid-19 prevented us from running the face-to-face research. We were able to return to face-to-face research in 2022 and 2023. We therefore make comparisons between 2018-2020 and 2022-2024, but we cannot make direct comparisons between those years and 2021.

The aim of the News Consumption Survey is to help us understand:

- News consumption across the UK and within each UK nation
- The sources and platforms used for news
- The perceived importance of different outlets for news
- The attitudes towards individual news sources, and local news use

Please see the [Ofcom Statistical Release Calendar 2024](#) for the News Consumption Survey 2024 [technical report](#), [published data tables](#) and [questionnaire](#).

Ofcom Podcast Survey

The Podcast Survey is a quantitative survey exploring behaviours and attitudes to podcasts, specifically among those who listen to podcasts regularly, with a view to obtaining a better understanding of in-the-moment needs, behaviours, and use.

The survey was conducted using Yonder’s online panel, reaching a 1,857 nationally representative sample which consisted of 501 non podcast users, 1,006 overall regular users and 350 occasional users. Regular podcast users were targeted via boost interviews (300 boost interviews) in order to reach a minimum of 1,000 regular users overall. Invitations to complete the survey were sent out on a nationally representative basis aligned to age, gender, region and socio-economic group, to ensure that we achieved a good demographic spread of respondents.

Please see the [Ofcom Statistical Release Calendar 2024](#) for the Podcast Survey 2024 [technical report](#), [published data tables](#) and [questionnaire](#). Key findings from the survey are written up in our April 2024 on [Audio Listening in the UK](#).

Ofcom Public Service Media (PSM) Tracker

The Public Service Media (PSM) Tracker is a continuous annual survey with about 3,000 UK individuals aged 16+. In 2023, fieldwork was conducted from 7 March to 22 December. It used a combination of push-to-web, push-to-telephone, online panel and river sampling methodologies. We surveyed 3,060 UK individuals aged 16+ in total, including 2,180 in England, 318 in Scotland, 310 in Wales and 252 in Northern Ireland. The data is weighted to be nationally representative of the UK using mid-2020 population estimates, the 2011 census and the 2017 annual population survey.

The aim of the PSM Tracker is to help us understand:

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

The PSM Tracker uses questions asking respondents to say how ‘well’ or ‘badly’ different elements are being provided, using a 1-10 scale where 1 means extremely badly and 10 means extremely well. When referring to ‘well’ throughout the Media Nations reports, it is a NET of scores 7 to 10.

Please see the [Ofcom Statistical Release Calendar 2024](#) for the Public Service Media Tracker 2023 [technical report](#), [published data tables](#) and [questionnaire](#).

Ofcom Technology Tracker

The Technology Tracker is an annual survey. In 2024, fieldwork was conducted from 8 January to 30 April and responses were collected from 4,000 individuals aged 16+ in the UK (England 2,499; Scotland 502; Wales 500; Northern Ireland 499). As in 2023, the 2024 tracker was conducted with 80% of the respondents completing the survey face-to-face, and the remaining 20% of respondents completing the survey online through a post-to-web approach. The tracker 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 individuals aged 16+.

The aim of the Technology Tracker is to help us understand:

- 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

Please see the [Ofcom Statistical Release Calendar 2024](#) for the Technology Tracker 2024 [technical report](#), [published data tables](#) and [questionnaire](#).

Ofcom VoD Survey

The video-on-demand (VoD) survey is an annual survey exploring the use of and attitudes towards video-on-demand services. Firstly, an online survey among a sample of 2,203 UK nationally representative people aged 13+ (with a boost to reach at least 150 respondents per nation) was conducted via Yonder’s online omnibus. Fieldwork took place from 26 to 29 February 2024.

This was followed by supplementary questions on Yonder’s telephone omnibus (consumption questions Q1a, Q1b, Q2a & Q2b) among a sample of 1,032 UK nationally representative individuals aged 18+, with a 50% landline, 50% mobile approach. Computer Assisted Telephone Interviewing

(CATI) fieldwork took place from 21 February to 5 March 2023. Data from questions collected via CATI were then combined with the online omnibus data.

The aim of the VoD survey is to help us understand:

- Consumption of video-on-demand and streaming services
- How services are used
- Attitudes to video-on-demand and streaming services
- Perception of the services subscribed to
- Subscription and types of payment for Netflix, Amazon Prime Video and Disney+
- Reasons for subscribing/unsubscribing
- Watching online content on TVs
- Audiovisual translation

Please see the [Ofcom Statistical Release Calendar 2024](#) for the VoD Survey 2024 [technical report](#), [published data tables](#) and [questionnaire](#).

2. Other research methodologies

Ampere Analysis

[Ampere Analysis](#) is a data and analytics firm. We reference various data points from its research, including financial metrics within the online video sector, and content hours in on-demand catalogues, segmented in various ways.

IPA TouchPoints

TouchPoints is an ongoing 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.

The 2019 data refers to the period January to May 2019. The 2020 data refers to the period January to April 2020, which was then split into two separate datasets: one from January to mid-March, before lockdown restrictions were introduced, and a second from mid-March to the end of April 2020. From 2021 onwards, the survey has been split into two waves a year. Wave 1 takes place between January and March and wave 2 between September and November. Wave 2 2023 and wave 1 2024 together form the 2024 Superhub, which is the dataset that we have referred to most in this report. Altogether, the sample comprised approximately 6,000 individuals (aged 15+) across Great Britain. Further details on fieldwork dates, sampling and methodology can be [downloaded as a factsheet from the IPA website](#). TouchPoints refers to adults as people aged 15+, so this labelling has sometimes been used in the reports.

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 that comparisons with pre-Covid data should be treated with caution. For this reason, we have included a break in any time series that shows data before Q3 2021. The RAJAR definition of adults is those aged 15+ and this labelling has been used in the reports when referring to RAJAR data.

3. TV output and spend analysis

PSB channels

Wherever possible, historical data has 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, except from 16 February 2016 until 31 January 2022, when it did not broadcast as a linear channel.

The nations' reports look at regional content broadcast across the national and regional 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 licences 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 2023 were:

- **ITV:** ITV2, ITV3, ITV4, ITVBe and CITV (in operation until 1 September 2023)
- **Channel 4:** E4, E4 Extra, More4, Film4, 4Seven, 4Music, Box, Kerrang!, Kiss and Magic
- **Channel 5:** 5USA, 5Action, 5Select and 5STAR

Since 2017, we have also included first-run UK-originated content made available exclusively on BBC iPlayer, ITVX (formerly ITV Hub), Channel 4 streaming (formerly All 4) and My5.

Since 2019, 4Music, The Box channels, 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).

Spend, and other financial data quoted in this report, is primarily presented in nominal terms, meaning that historical data has not been adjusted to account for inflation. For those who wish to see how inflation has historically affected the value of the industry, our interactive report enables financial data to be viewed in either nominal or 'real' (CPI-adjusted) terms, with users easily able to switch between the two.

All spend and output data are based on programmes broadcast in each calendar year, e.g. 2022 data reflect programmes broadcast during 2022.

Output hours

Definition of peak time

The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three (during periods in which it was 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 Audiovisual 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.

¹ Before 2006 'drama and soaps' and 'entertainment and comedy' were combined.

- Political debates, ministerial statements, party conferences.

Arts and 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 or literature.

Religion and 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 and wildlife – natural history and programmes about environmental issues.
- Science and technology – programmes about scientific issues, new discoveries, medical matters and new technological developments.
- Business and 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 previous theatrical release, including films commissioned by the broadcaster.

Entertainment

- All forms of entertainment programme, including panel games, chat and 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

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.

4. TV and AV consumption analysis

Total video consumption

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

The main input for the 2023 estimates is from Barb Audiences Ltd (Barb). See the next section: TV viewing figures, for more information about Barb. Since November 2021, Barb's measurement extension has included more detail for some video-on-demand (VoD) platforms and video-sharing platforms (VSPs), both across TV sets and other devices connected to a home's WiFi network. Barb does not measure out-of-home viewing.

In previous years, the total video consumption estimates included profiling for VoD and YouTube video viewing on TV sets using IPA TouchPoints, as well as data from Comscore for YouTube on non-TV devices. In the 2023 report we used IPA TouchPoints to help estimate out-of-home viewing. This year we have used only Barb, to present in-home viewing only. We have recalculated the 2022 figures so that we have a direct comparison with 2023.

Categories excluded from this year's analysis are: gaming on TV sets (included before last year's report), cinema viewing, and the consumption of billboard and outdoor advertising video.

'Broadcaster content' includes live TV, recorded playback and BVoD. 'Other TV set usage' includes viewing of some SVoD/AVoD/VSP services that cannot be definitively identified by Barb. This category also includes some EPG/menu browsing, viewing when the audio is muted, some unmeasured broadcast channels, piracy, unmeasured box-sets/pay-per-view content, and non-video internet activity through a PC or other device connected to the TV. SVoD excludes viewing of NOW, which is captured within BVoD along with Sky Go/Sky On Demand (these two services stream the same content, meaning that measured viewing cannot be separated).

TV viewing figures – Barb

The data are provided by Barb Audiences Ltd (Barb), the industry's standard for understanding what people watch. Barb uses a hybrid approach, integrating people-based panel data with census-level online viewing data to provide the official broadcast TV measurement for the industry. Barb's panel currently consists of a nationally representative panel of approximately 5,300 homes (approximately 12,000 individuals). The data that Barb collects includes viewing of broadcast TV through TV sets and via any devices attached to TV sets, such as computers, streaming devices, or set-top boxes. Barb also captures device-based 'big data' whenever anyone in the UK watches a broadcaster's video-on-demand (BVOD) service on a connected device, as well as some viewing data for online streaming services, and for devices not connected to the TV being watched at home via WiFi. Barb does not capture out-of-home viewing.

Unless otherwise stated, 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 for 28-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 28

days after first broadcast (known as time-shifted viewing). 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. Barb refers to adults as people aged 16+, so this labelling may sometimes be used in the report.

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

Barb analysis has been taken from the AdvantEdge TV analysis software. Data presented in our other historical reports before 2018, such as the PSB Annual Research Report and 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 when 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 a 16-34 profile of 10%, this means that 10% of viewers aged 16+ were aged 16-34, while the other 90% were aged 35+.

Average audience – a programme audience is calculated by adding together the audience for each minute of a programme and dividing it by the programme's total duration. It excludes any commercial breaks and promotions.

All PSBs/PSB channels – this includes the main five PSB channels – BBC One, BBC Two, ITV1 (which includes ITV1, STV, UTV and ITV Cymru Wales), Channel 4 and Channel 5 (excluding their +1 channels) – as well as S4C and all BBC portfolio channels excluding BBC ALBA (as this is not measured by Barb). The report sometimes uses the term 'the main five PSB channels'. This refers to BBC One, BBC Two, ITV1/STV/UTV/ITV Cymru Wales, Channel 4 and Channel 5 (excluding any +1 channels).

5. Abbreviations

Advertising-supported video-on-demand (AVoD): On-demand/streaming services that include advertising and are not affiliated with broadcast TV channels (distinct from **BVoD**).

Broadcaster video-on-demand (BVoD): Refers to all on-demand/streaming services offered by one of the UK's main broadcasters and includes BBC iPlayer, ITVX, Channel 4 streaming, Sky Go, UKTV Play, My5.

Digital television (DTV): television delivered via digital transmission as opposed to analogue. In RAJAR this may include Freeview, satellite and cable services, as respondents are recording the stations they listened to and how they listened (AM/FM radio, DAB digital radio, digital TV, online / app, smart speaker).

Subscription video-on-demand (SVoD): On-demand/streaming services that are only available on a paid-subscription basis. Examples include Netflix, Amazon Prime Video and Disney+.

Video-sharing platform (VSP): Online video platforms which allow users to upload and share videos with the public are classed as VSPs, even if they are funded by subscriptions or advertising. These include YouTube, TikTok and Twitch.

6. Other third-party sources

[Advertising Association \(AA\) / WARC Expenditure Report](#)

[BPI](#)

[British Film Institute \(BFI\)](#)

[ERA](#)

[IAB and PwC Digital Adspend Study 2023](#)

[Official Charts Company](#)

[Pact](#)