Ofcom's Annual Report on the BBC: 2017/18

Annex 3: Methodology overview

Contents

Section

About this document

The BBC Performance Report is based on our performance measurement framework and this document provides an overview of the sources used.

Section 1 provides detail on the output and spend data used to inform availability, including our own analysis.

Section 2 sets out the industry currencies we have used. For consumption of television and radio, where possible, we have used the Joint Industry Currencies, BARB and RAJAR. For online, where possible we have drawn on UKOM (comScore) data. In addition, we have drawn on other sources, such as TouchPoints, to provide cross-media consumption, or our own tracker data to provide additional cross-platform news consumption data.

Section 3 provides methodological details of our own commissioned Ofcom research. It includes both qualitative and quantitative research, for example the BBC Performance Tracker, commissioned specifically to assess audience opinions on the BBC's performance against its delivery of four public purposes.

1. BBC output and spend analysis

Wherever possible, historical data have been provided for BBC One, BBC Two, 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. BBC portfolio figures include BBC Three until it ceased broadcasting as a linear channel on 15 February 2016.

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

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 promos whereas running time excludes these minutes from programme output hours analysis. We have used slot time when analysing network output and running time when looking at nations' and regions' output and programme-level data.

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 (AVMSD).

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.

---

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

- 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.

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.

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). Expenditure on costs not attributed to individual programmes, such as presentation, commissioning, scheduling, copyright and helpline, are not included in these figures. As such, genre spend figures differ from those published by the BBC themselves in their Annual Report.

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 Office for National Statistics).

All spend and output data are based on programmes broadcast in each calendar year, e.g. 2017 data reflect programmes broadcast during 2017.

Where financial year data is used, these figures come directly from the BBC's Annual Reports and represent content spend unless otherwise stated.

Ofcom analysis of BBC data is available to view in our interactive data visualisation.

RadioMonitor

RadioMonitor is a service that monitors airplay of music tracks on UK radio stations. It provides logs of music tracks played on a radio station within a given time period, and aggregated charts of the music tracks ordered by number of plays. Each music track is labelled with its artist, and other data points where available, such as the artist's nationality, release date, and record label.

Official Charts Company

The Official Charts Company compiles the Official Singles Chart. Total physical sales, downloads and streams of singles (and the equivalent music videos) from the preceding seven days (Friday to Thursday) are compiled to provide the week's singles chart. 100 streams (either audio or video) of a track via a subscription service equate to one sale. 600 streams (either audio or video) of a track on an advertising-funded service equate to one sale. Where data are not available for certain days from streaming services in a given week, their data for the other days is upweighted.

> ### Ofcom analysis
>
> To conduct our analysis of 'new music' and proportion of tracks from the Top 10 of the UK singles chart played on radio stations, we have reconciled data from RadioMonitor and the Official Charts Company. We have used the definitions of daytime and peak listening time, and for 'new music' set out in the BBC Operating Licence.
>
> In analysing the music output on radio, we have considered the:
>
> - number of different music tracks played;
> - number of total plays of music tracks;
> - repeat rate of music tracks – the average number of times each different music track is played;
> - proportion of music by UK artists – using the number of plays of music tracks performed by UK artists;
> - proportion of music from the Top 10 of the UK singles chart – using the number of plays of music tracks which were in the Top 10 at the start of the sample week (i.e. for the sample week 3-9 February 2018, we used tracks announced in the Top 10 on 2 February 2018); and
> - proportion of 'new music' – using the number of plays of music tracks defined as 'new' according to the BBC Operating Licence.
>
> For our analysis of music played by UK artists, we have used the nationalities as labelled by RadioMonitor. The service labels Northern Irish and Irish artists as from the island of Ireland. For our purposes, we have combined artists from Northern Ireland with those from Great Britain to analyse UK artists, noting that RadioMonitor does not have nationality data for every artist.
>
> This Ofcom analysis is available to view in our BBC Performance Report: interactive data.

2. Industry measurement sources

Industry currencies

BARB

Broadcasters' Audience Research Board (BARB) is 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 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 programmes through all devices attached to the TV set are included, but unless they are played through the TV set computers, laptops and tablets are not included. Most figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency.

The viewing metrics used in the analysis are minutes/hours of viewing, average weekly reach, share of viewing and channel profile (total viewing minutes split for example by age groups or socio-economic group).

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).

Viewing through BBC iPlayer is included in the overall figures if it is on the TV set and is viewed within seven days of broadcast. The ring charts showing overall BBC consumption across platform (TV, radio and online) include an estimate of total BBC iPlayer viewing and this includes viewing across all devices and outside the usual seven-day BARB window.

BARB programme genre definitions

The genres defined in the data for **availability** (i.e. the BBC's output and spend) and **consumption** section use different datasets, which have slightly different programme classifications. The former is sourced from information submitted directly from the BBC to Ofcom, while the latter is sourced from BARB programme logs and grouped by Ofcom. **Figure 1** below shows the Ofcom genre groupings and BARB definitions used in this report.

Figure 1: BARB genre classifications

Ofcom genre label	Definition: BARB genres
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
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
National/ International News	News: National/International
Leisure Interests	Hobbies/Leisure (All)
Sport	Sport (All)
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)
UK Drama	Drama: Single Plays – UK
	Drama: Series/Serials - UK
UK Soaps	Drama: Soaps - UK
Drama: Other	Drama: Single Plays - Non-UK
	Drama: Single Plays – Generic
	Drama: Soaps - Non-UK
	Drama: Soaps – Generic
	Drama: Series/Serials - Non-UK

	Drama: Series/Serials - Generic
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
All other genres	Arts: (all)
	Current affairs: (all)
	Documentaries: Natural History & Nature
	Documentaries: Science/Medical
	Education: (All)
	Party Political Broadcasts: (All)
	Religious: (All)
	Cinema Films: UK
	TV Films: UK
	Music (all)
	News: Regional
	News: Generic
	Weather: National
	Weather: Regional
	Other: New Programme

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. The overall adult 15+ sample is around 100,000 each year, with each respondent participating for only one week. Further detail on the methodology and sampling can be found on the RAJAR website.

BBC radio programme genre definitions

RAJAR does not provide programme-level data though this can be derived by grouping 15-minute time slots accordingly. We reviewed the schedules for the five main BBC radio networks at a point in time during the analysis period and grouped programmes into broad genres (e.g. specialist music, news & current affairs, factual). The BBC verified the genre-allocations, indicating if there were any changes to be aware of across the year.

UKOM (comScore)

The UK Online Measurement Company (UKOM) was formed in 2009 with a mandate from the advertising industry to establish measurement standards for digital media. In 2012 UKOM appointed comScore as its exclusive partner for online media audience measurement in the UK. We have used three of the comScore products:

1. For analysis of laptop and desktop computer, mobile and tablet PC internet activity only, we use comScore Media Metrix Multiplatform (MMX) which employs comScore's Unified Digital Measurement (UDM) methodology, explained below.

2. For analysis of internet video viewing activity across platforms, we use comScore VMX Multi-Platform which provides metrics on video viewing across devices.

comScore's Unified Digital Methodology (UDM) combines panel and census measurement techniques to obtain digital audience measurement statistics. UDM uses comScore's global measurement panel to determine audience reach and demographics. Census-level activity is captured from publishers' digital content, such as on websites, videos, and computer and mobile applications. comScore combines census-level data with those captured from the panel to help provide a more accurate view of audiences and their consumption habits. This approach allows comScore to capture more accurate consumption activity from publishers, and attribute this to audience demographics in a way that is not affected by cookie deletion, blocking, or rejection.

Measuring internet consumption is in its relative infancy compared with the established systems for measuring TV (BARB) and radio (RAJAR). For this reason, there are changes and improvements in methodology introduced periodically which make trends over time more difficult to report. We will use time series on occasion but are careful to report the size of the change and the contextualising of any change appropriately.

TouchPoints

TouchPoints is an annual survey commissioned by the Institute of Practitioners in Advertising (IPA). With a sample of approximately 6,000 adults aged 15+ across Great Britain, it uses a seven-day diary to capture media consumption and other daily activities every half hour. It also uses a self-completion questionnaire which includes attitudinal statements. Further detail on TouchPoints can be found on the IPA website.

Ofcom analysis

A. 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: provides 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: provides 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: 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: 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

B. Total AV consumption

This analysis uses industry measures wherever possible to enable a repeat assessment to be made. It is likely that we may amend our approach in future to take account of different measurement possibilities as they emerge. There are several aspects of BBC consumption measured in this analysis:

- Live BBC TV on a TV set from BARB
- Estimated DVR viewing using BARB TV time-shift viewing and modelling from TouchPoints
- BBC iPlayer from BARB TV player report (non-TV set) plus modelled TV time-shift viewing left over from above
- BBC on SVoD uses total SVoD figures from total AV methodology above and uses GfK viewing data to apply a fraction of BBC viewing of the whole
- BBC on YouTube uses comScore VMX multiplatform data looking at certain BBC channels within YouTube. Audience is 18+/18-34
- BBC radio – from RAJAR. Audience is 15+/15-34

- BBC websites uses comScore MMX multiplatform data – offline population not accounted for, audience is 18+/18-34
- BBC podcasts – not included in main chart but is sized in source notes using TouchPoints data
- BBC Three – not included, no methodology found to calculate minutes used

3.   Ofcom research sources

Ofcom BBC Performance Tracker

The BBC Performance Tracker is conducted using a 50/50 mixed methodology – online and CAPI face-to-face data collection. Quotas are set on nation and region, gender, age, ethnicity and religion, internet use and working status (F2F only) using a combination of 2011 census data, data from the GfK Random Location (F2F) Omnibus and Financial Research Survey (FRS).

Ethnicity, religion and nation (Wales and Northern Ireland) are boosted. The survey is conducted annually on a rolling basis among 4000 respondents. Fieldwork for the first year of the BBC Performance Tracker was undertaken from 9 October 2017 to 13 April 2018. The data are weighted to be nationally representative of the UK population.

The tracker provides Ofcom with an evidence base to assess audience opinions on the BBC's performance against its delivery of four public purposes. Data tables can be accessed on the Ofcom website.

Ofcom News Consumption Survey

Ofcom's News Consumption survey has been conducted on a yearly basis since 2013, using a face-to-face omnibus methodology. In 2017/18 we changed the methodology to a standalone survey, using a mix of face-to-face CAPI and online interviews. This allowed us to increase questionnaire length and sample size in a cost-effective way. This enables, among other things, more granular sub-group analysis and a more detailed exploration of online news consumption.

Jigsaw Research Limited was commissioned to conduct a mixed methodology approach, combining 2,430 online interviews and 2,188 face-to-face interviews. Nations were boosted during fieldwork to produce robust sample sizes for analysis. Interviews were conducted over two waves of research (November & December 2017 and March & April 2018) to achieve a robust and representative view of UK adults. Data tables and the report (including findings from the Children's News Consumption Survey) can be accessed on the Ofcom website.

Ofcom Children's News Consumption Survey

Ofcom's Children's News Consumption survey was conducted by Jigsaw Research Limited online among 1000 12-15 year-olds. The fieldwork period was in November and December 2017 and March and April 2018 and this was the first year of this research. The data have been weighted to correct for over-representation of nations, and weights were applied for age, gender and socio-economic group (SEG) within nation to match known population profiles.

Ofcom 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 an 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+. There are further details on the weighting and the data tables can be accessed on the Ofcom website.

Ofcom Representation and Portrayal Review: qualitative research

A UK-wide qualitative study was conducted by Kantar, an independent market research agency. The overall objectives for the study were to understand the importance and meaning of representation and portrayal to different audiences, and to explore how well BBC TV is perceived to be performing.

The fieldwork was conducted across the UK in May, June and July 2018. Particular care was taken to ensure that a range of diverse audiences participated in a range of locations within each UK nation. Thus, alongside 'mainstream' audiences from across the socio-economic spectrum, we heard from people from different ethnic and religious backgrounds, people who identified as LGBT, and people with various disabilities. We also took care that participants with overlapping diversity characteristics took part. We conducted sessions both in urban areas and in more remote, rural areas.

Each research interaction was tailored to the characteristics and needs of the participants. Thus, alongside focus groups and multi-moderator workshops, we also ran in-home interviews with between 1 and 3 participants where it was felt to provide a more empathetic setting. Where appropriate, we interviewed some participants alongside their carers.

The research agency drew from a pool of experienced research moderators who were themselves from diverse backgrounds, in order to match as far as possible, the moderator's gender, ethnicity and other relevant characteristics, to that of the participants.

In total, 312 individuals took part in the research; this number, whilst large for a single qualitative study, is not to be read as statistically significant but is rather a reflection of the breadth and granularity of different viewer types interviewed within each UK nation. The report and more details on the methodology can be found on the Ofcom website.

14

Ofcom Children's Media Literacy Tracker

Ofcom's Children's Media Literacy Tracker is a face-to-face survey run once a year between April and June. In 2017, 1,388 in-home interviews with parents and children aged 5-15 were conducted, along with 677 interviews with parents of children aged 3-4. The objective of the survey is to provide detailed evidence on media use and understanding among children and young people aged 5-15, as well as in-depth information about media access and use among children aged 3-4. It also includes data on parents' views about their children's media use, and the ways that parents seek – or not – to monitor or limit such use. The data are weighted to the national UK profile. The summary report can be accessed on the [Ofcom website](#).