

Annex 9

PSB Review Phase 2 – Public Service Content and the Internet

Quantitative research slidepack

Background

Objectives

GfK NOP Media were commissioned to conduct a short survey regarding Public Service Content (PSC) online. The aim was to give insight into current use of PSC online, perceived importance of PSC online and views on PSC online from experience, including the ease of discovering this type of content online.

Methodology

The surveys were conducted as part of the GfK NOP telephone omnibus and fieldwork was conducted between the 20th and 22nd of June 2008.

One thousand interviews were conducted by fully trained and supervised market research interviewers. The sample was weighted to ensure that it was representative in terms of known population data on age, sex, social class, number of adults in household, working status and region.

The definition of Public Service Content given to respondents and used throughout the survey was:

“Content and websites that does one or more of the following:

- Informs our understanding of the UK or the world*
- Encourages our interests in and knowledge about subjects*
- Brings us together and strengthens our UK culture*
- Makes us aware of different opinions or different cultures*

This can cover a wide range of areas like news, current affairs, arts, sports, religion, local information, hobbies and interests amongst other things.”

Overview of findings (1)

Use of PSC online

When given a description of PSC online, 62% of people who ever use the internet said that they had used the internet for PSC (Within this, 8% said they had 'maybe' used PSC online. A later question identified that online sites/information they used could be considered as PSC).

When prompted with a list of potential PSC activities, around three quarters of those claiming to using PSC online said they used the internet for information about their local area, news/current affairs, events (e.g. festivals, sports events) and factual/educational content and hobbies/interests. On-demand (33%) and streamed content (37%) were not used as often as other types of sites/information.

In addition to responding to the prompted list of types of PSC, respondents were asked to state any other relevant activities they did online, with just under one quarter (23%) naming finding information about health/health services and 23% naming information about the government or local councils.

Perceptions of findability and quality

For the majority of users of PSC online, 'findability' of this content was not perceived to be as an issue; it was seen to be very easy or easy (81%). The most popular way of searching for PSC online was through search engines, with 89% of people claiming to use these and 77% saying this was their most often method of finding PSC online. 69% used websites they already knew and trust, whilst 63% use links or click through from other sites and 59% used recommendations from friends.

Around 9 in 10 users of PSC online agreed that the internet was a good source of high-quality PSC, that the internet provided PSC that interests them and was a good source of new PSC. Eight in ten also thought there was enough PSC available online.

NB This research focused upon users of PSC online only and did not investigate reasons why people didn't use PSC online. Previous research in the PSB Review Phase 1 identified reasons for lack of use of PSC online. See PSB review phase 1 annex 5: *The audience's view on the future of public service broadcasting*: quantitative research among 2,260 adults 16+ in the UK, 2007

Overview of findings (2)

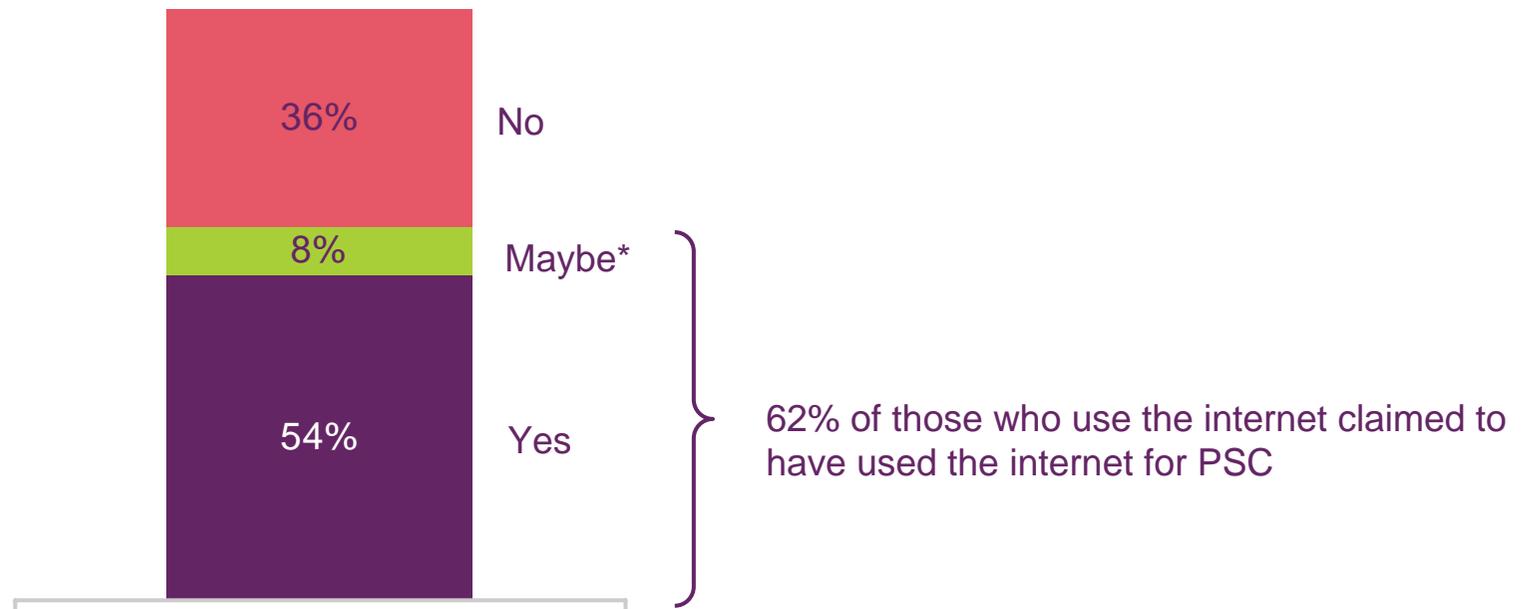
Importance of PSC online

The majority of users of PSC online tended to believe that it was important that the internet fulfilled a range of different roles relating to public service content (see chart for details). The only areas of public service content asked about that there was some uncertainty about were content for children and teenagers – potentially due to the nature of the platform in comparison to TV.

In addition, opinions of UK adults overall indicate that people generally were more likely to believe it was important than unimportant that the internet fulfils various roles relating to public service content e.g. 62% rated it as important that the internet helps people to learn and find out about subjects and 55% rated it as important that it provides interesting content about history, science and other topics.

Use of internet for PSC

Whether PSC activities are carried out online



* All those who said “maybe” identified their use of online sites/information that can be considered as PSC at a later question in the questionnaire

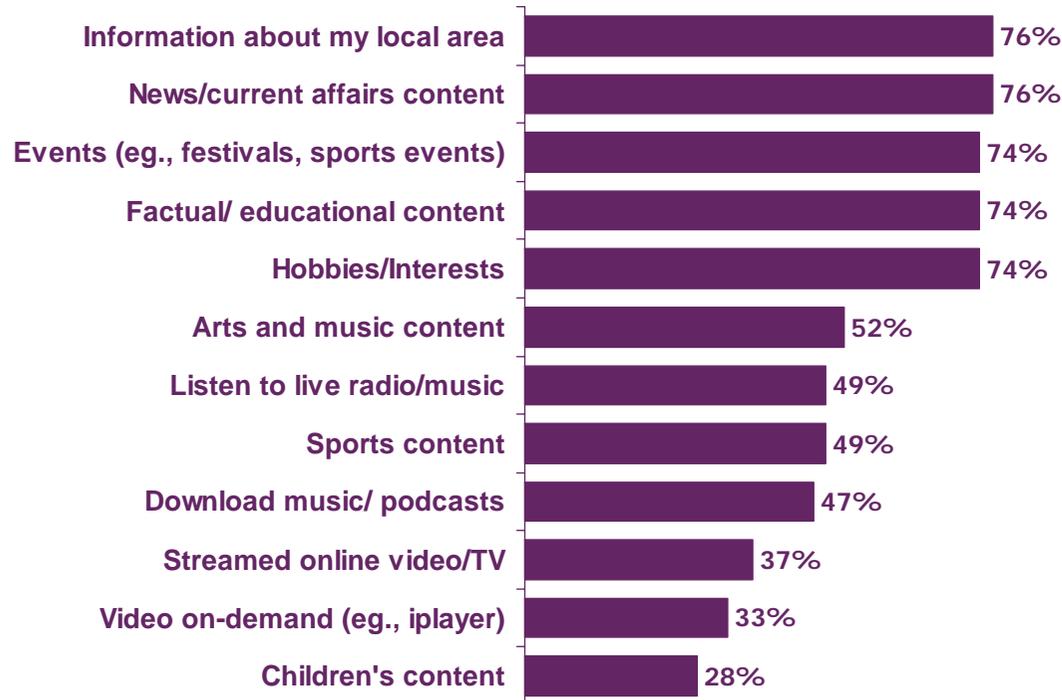
“Do you ever use the internet for anything that could be described as public service content?” (Respondents were given a description of PSC)

1% said ‘don’t know’

Base: Gfk NOP. June 08. All adults 16+ who use the internet (707)

Use of internet for PSC

Which PSC related activities are carried out online (prompted), amongst those using PSC online

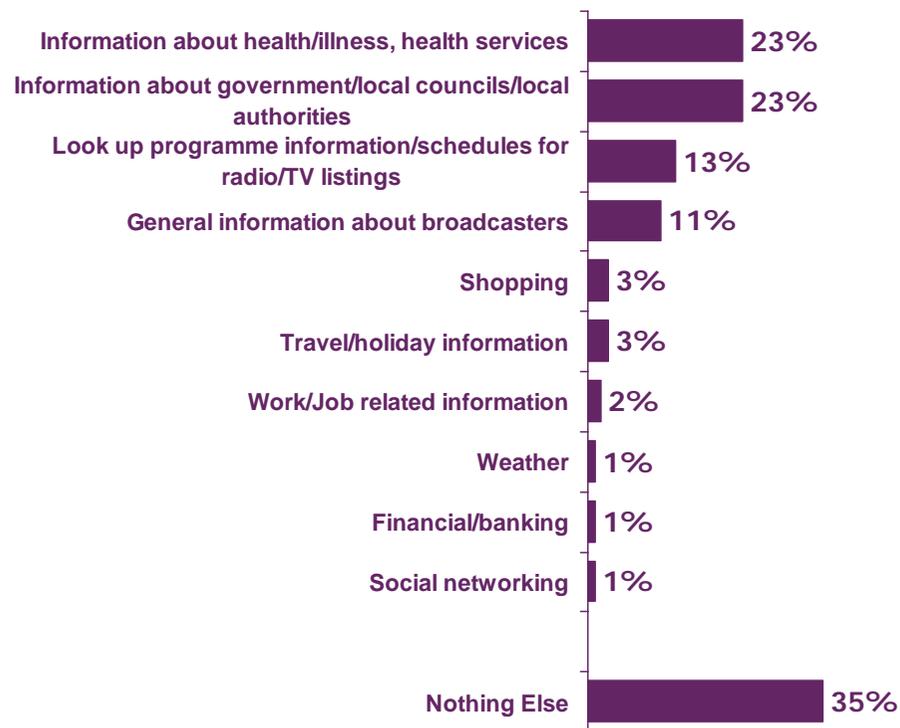


Q6: "Still thinking about this type of PSC, which of the following, if any, do you currently use websites for?" (Respondents were give a description of PSC and prompted with the list of types of PSC)

Base: Gfk NOP. June 08. All adults 16+ who use the internet for PSC (452)

Use of Internet for PSC

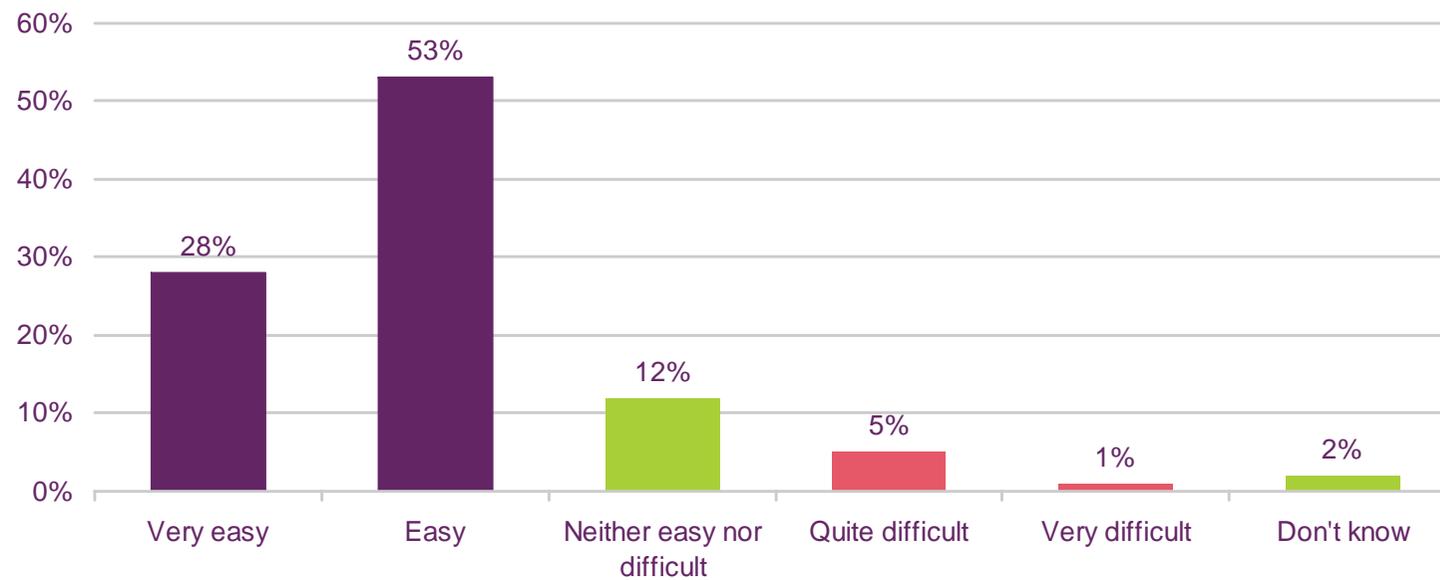
Which *other* PSC related activities are carried out online (unprompted), amongst those using PSC online



Q7: "Do you use the internet for any other types of PSC, not mentioned above?" (unprompted)
Base: Gfk NOP. June 08. All adults 16+ who use the internet for PSC (452)

Discoverability of PSC

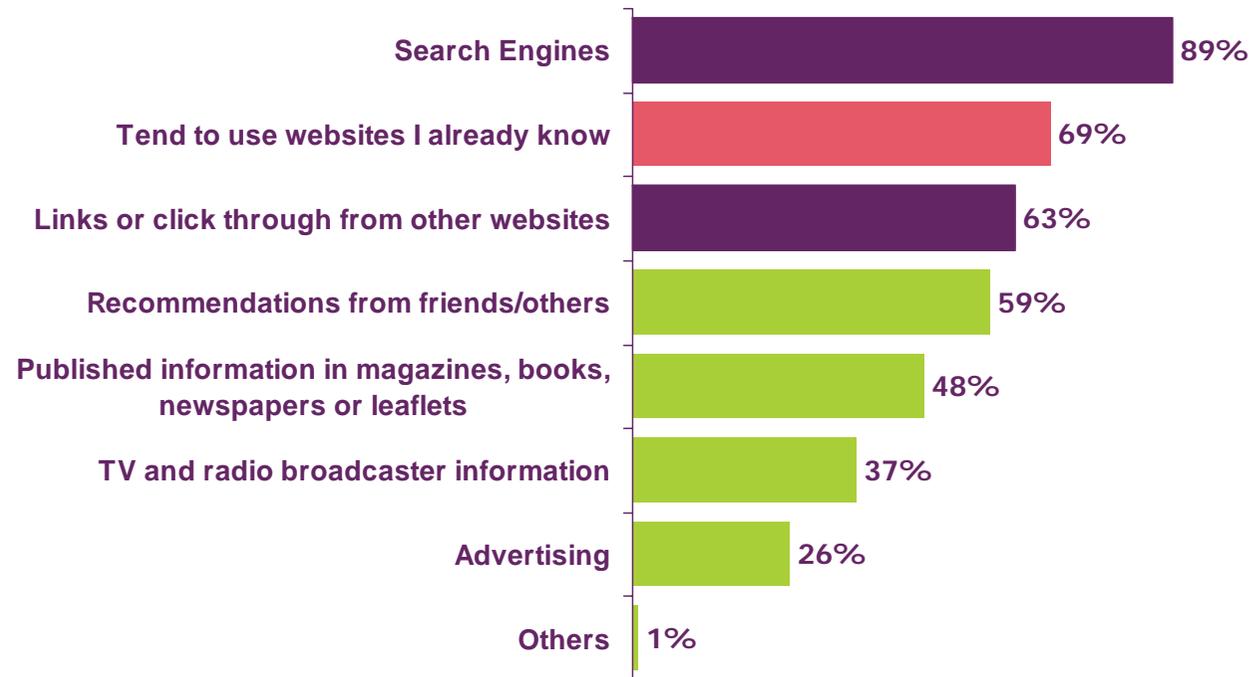
Ease of discovering PSC online, amongst those using PSC online



Q10: "In your experience, how easy is it to find new, interesting or high quality PSC online?"
Base: Gfk NOP. June 08. All adults 16+ who use the internet for PSC (452)

Discoverability of PSC

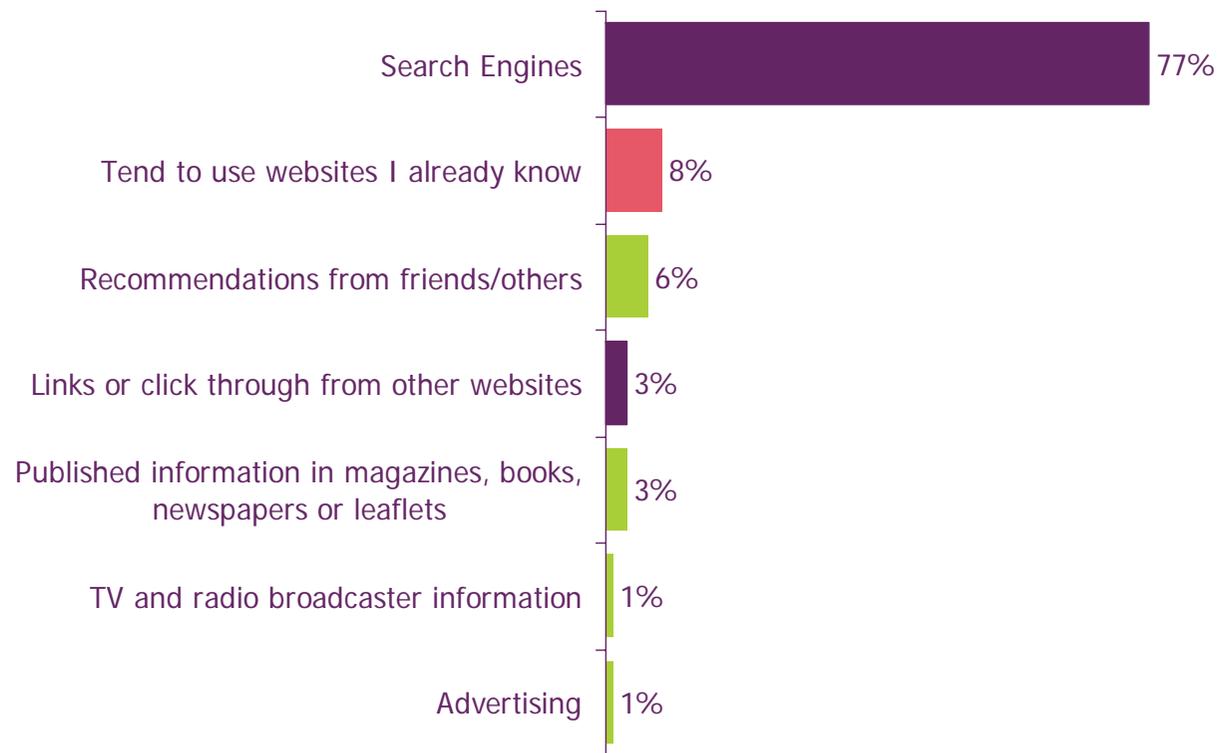
How PSC is found online, amongst those using PSC online



Q8: "how do you tend to find new, interesting or high quality PSC on the web?" (prompted)
Base: Gfk NOP. June 08. All adults 16+ who use the internet for PSC (452)

Discoverability of PSC

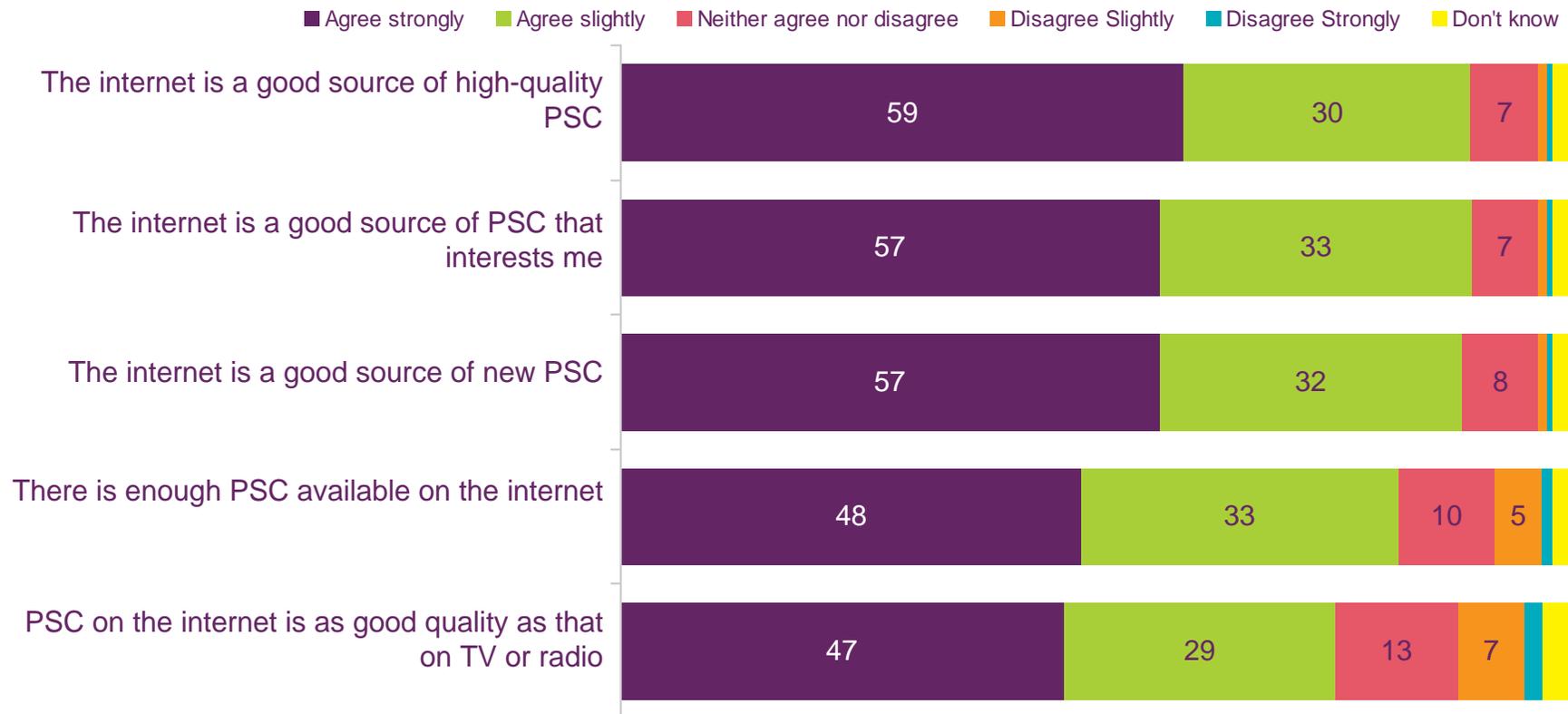
How PSC is *most often* found online, amongst those using PSC online



Q9: "Which of the following methods to you use most often to find new, interesting or high quality PSC on the web?" (prompted)
Base: Gfk NOP. June 08. All adults 16+ who use the internet for PSC (452)

Perception of PSC

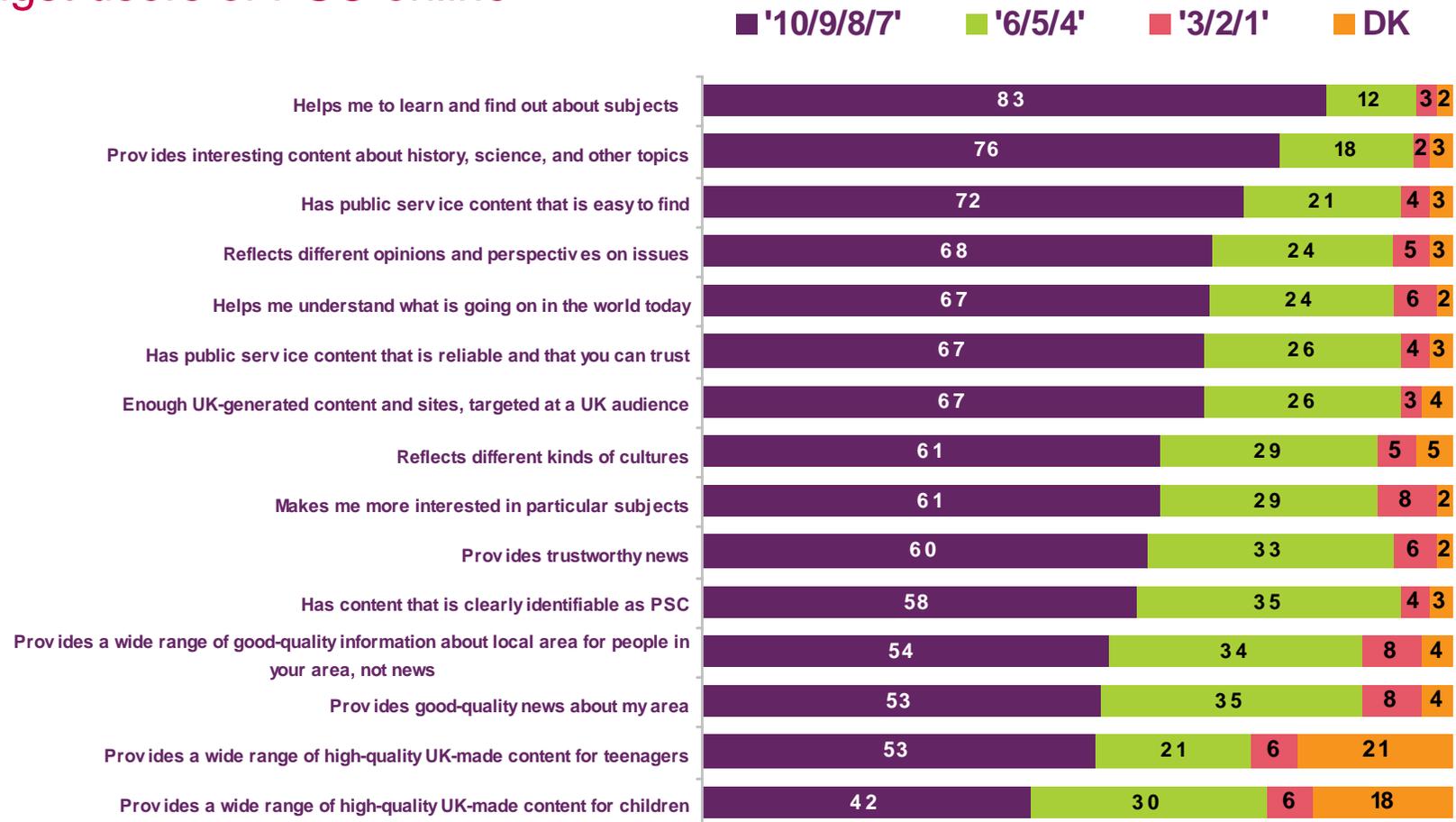
Agreement with statements on quality of PSC, amongst those using PSC online



Q11: "Thinking again about this PSC, to what extent do you agree or disagree with the following statements?"
Base: Gfk NOP. June 08. All adults 16+ who use the internet for PSC (452)

Importance of PSC

Rating of importance of PSC and elements of Purposes and Characteristics, amongst users of PSC online

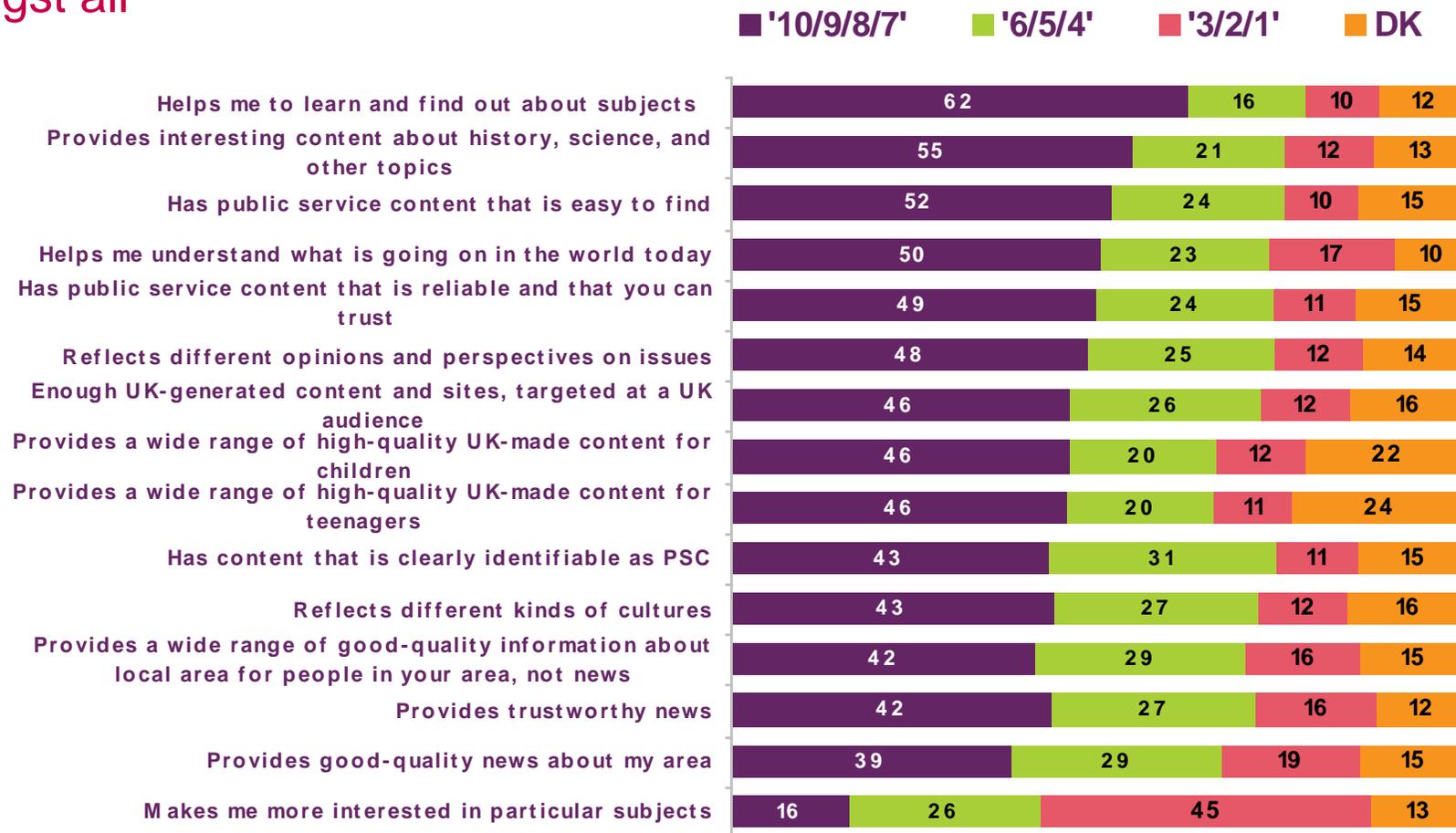


Q12: "How important do you think it is that the internet does each of the following?"

Base: Gfk NOP. June 08. Adults 16+ who use the internet for PSC (452) NB: Variation in totals from 98-101% due to rounding

Importance of PSC

Rating of importance of PSC and elements of Purposes and Characteristics, amongst all



Q12: "How important do you think it is that the internet does each of the following?"

Base: Gfk NOP. June 08. All adults 16+ (1002) NB: Variation in totals from 98-101% due to rounding