

PSB Review 2008

Research findings

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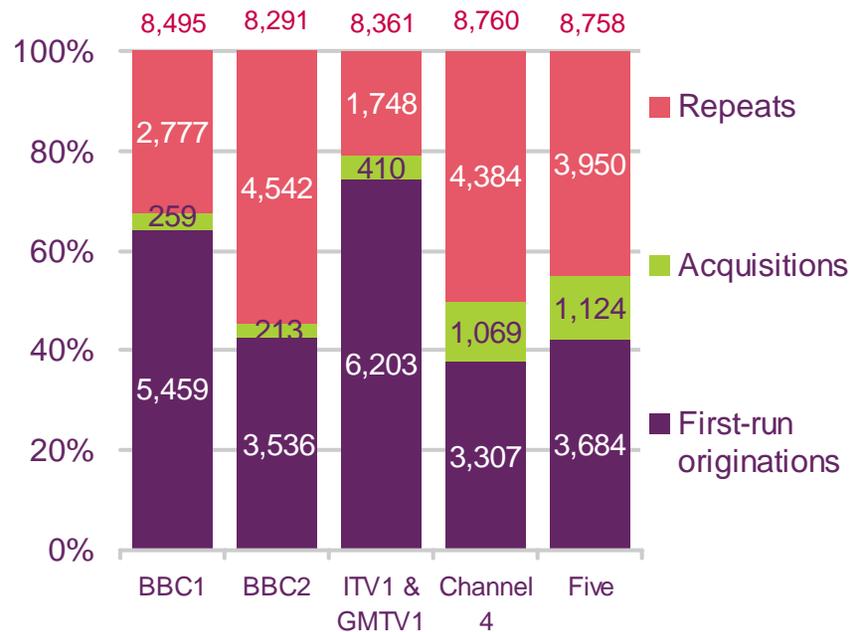
Introduction

- This slide pack is an annex to Ofcom's PSB Review 2008 Phase I consultation document published on 10th April 2008
- It provides a summary of the research evidence base that was drawn on in compiling the consultation document, in particular in relation to Section 3 'How well are the public service broadcasters delivering public purposes?'
- It contains research data from the following sources:
 - Broadcaster output and investment
 - Digital television take-up
 - BARB audience viewing figures
 - Audience research from:
 - Quantitative UK wide survey commissioned by Ofcom for the PSB Review (PSB Review survey)
 - Deliberative workshops commissioned by Ofcom for the PSB Review (PSB Review deliberative)
 - PSB Tracker
 - PSB online survey
 - Ofcom's Media Literacy Audit
- Methodologies for each of these research sources are outlined at the end of the pack

Broadcaster output & investment data

Output by PSB and source, all day in 2007

Proportion of total hours %

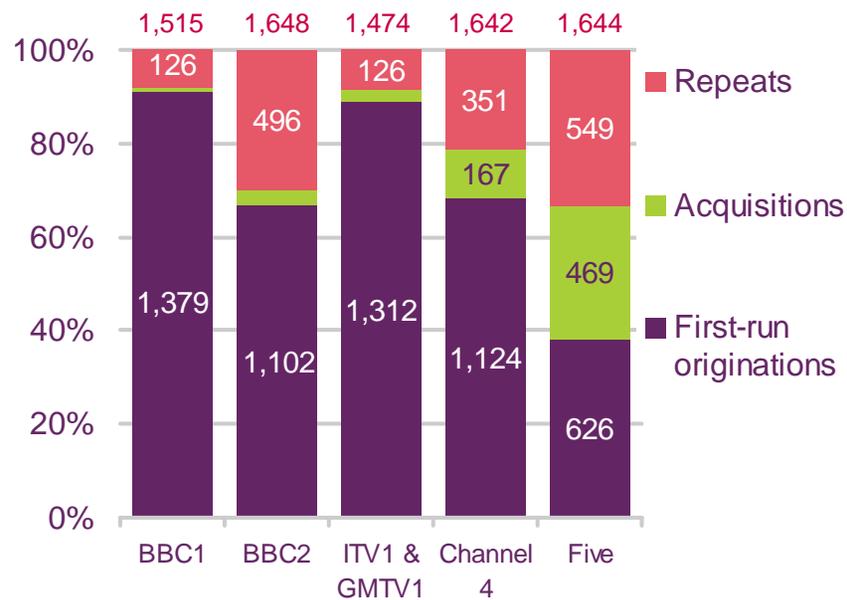


- ITV broadcast proportionately the highest volume of first-run originated hours (74%) among the five main PSB channels in 2007 on an all day basis.
- It was followed by BBC One with 64% of all hours.
- The remaining three channels broadcast fewer hours of originated output - 42% of BBC Two hours, 38% on Channel 4 and 42% on Five.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only.

Output by PSB and source, peaktime in 2007

Proportion of total hours %

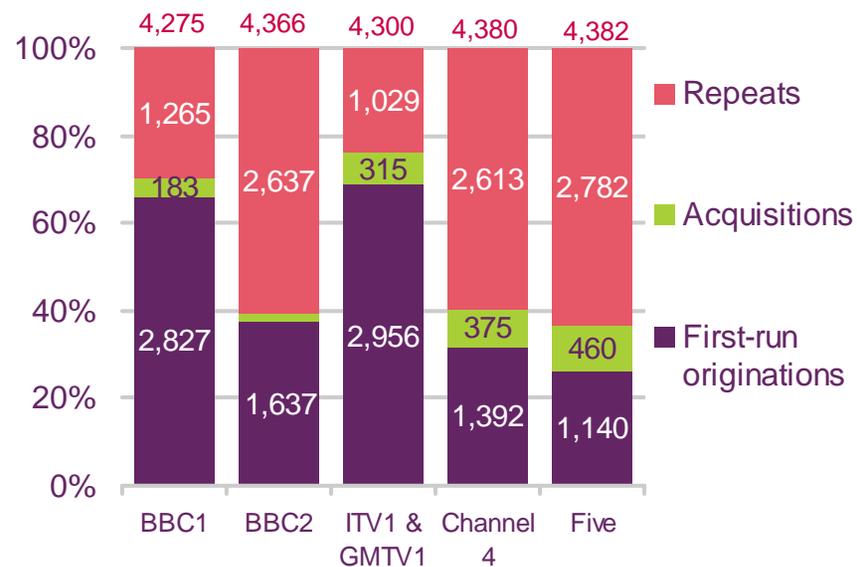


- In peak the picture changes significantly.
- 91% of BBC One hours and 89% of ITV1 hours were originated in 2007.
- BBC Two and Channel Four originated 67% of their hours while 38% of Five's hours were first-run originations.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only.

Output by PSB and source, day time in 2007

Proportion of total hours %



- ITV1 broadcast the highest proportion of first run originations in 2007 at 69% of total hours; BBC One followed with 66%.
- BBC Two, Channel 4 and Five broadcast fewer hours proportionately (37%, 32% and 26% respectively) with repeats playing a more significant role on each of these three channels.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only.

Output from the five main PSBs by source, all day

Proportion of total hours %

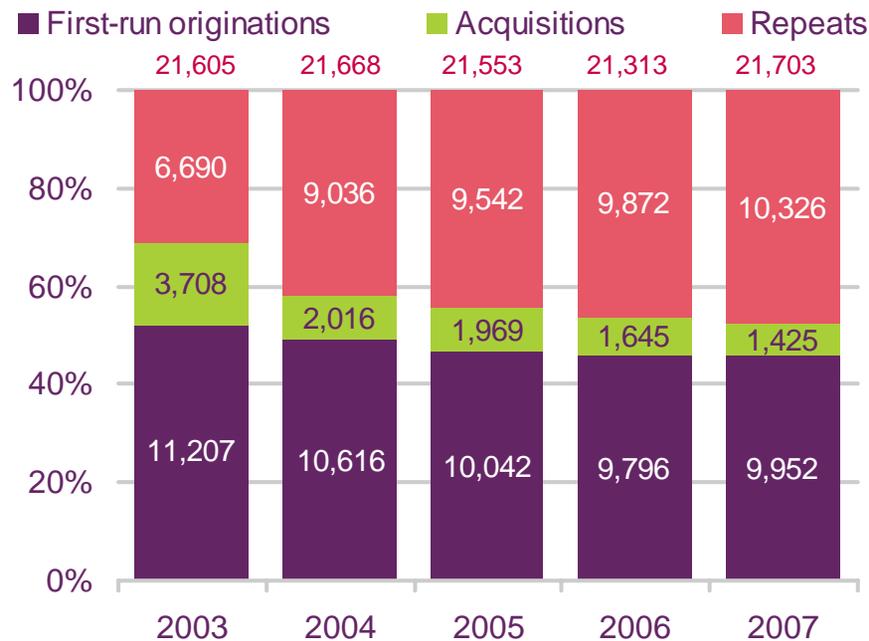


- Over time, the proportion of first-run originations among all hours broadcast by the five main PSB channels has risen by 1% since 2003.
- Note that a definitional change explains the change in the volume of acquired/repeated content between 2003 and 2004.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only.

Output from the five main PSBs by source, daytime

Proportion of total hours %



- In daytime, first-run originations fell by 11% to 9,952 hours.
- Note that a definitional change explains the change in the volume of acquired/repeated content between 2003 and 2004.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only.

Output from the five main PSBs by source, peaktime

Proportion of total hours %

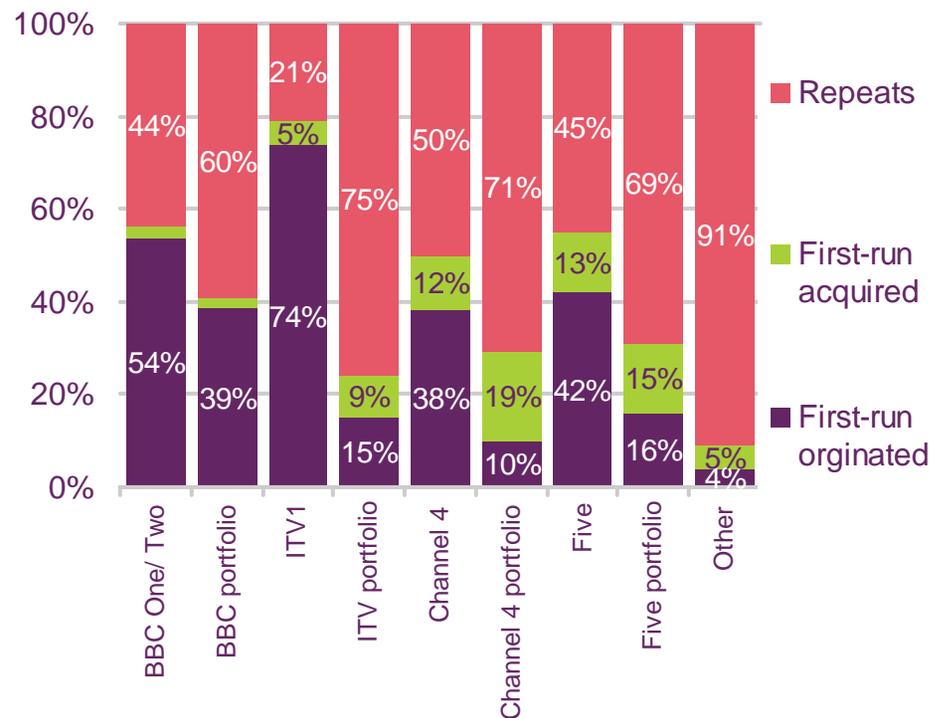


- In peaktime, first-run originations fell by 3% to 5,543.
- Note that a definitional change explains the change in the volume of acquired/repeated content between 2003 and 2004.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only.

Volumes of origination: main five PSB channels vs. PSB Portfolio channels versus other digital-only channels

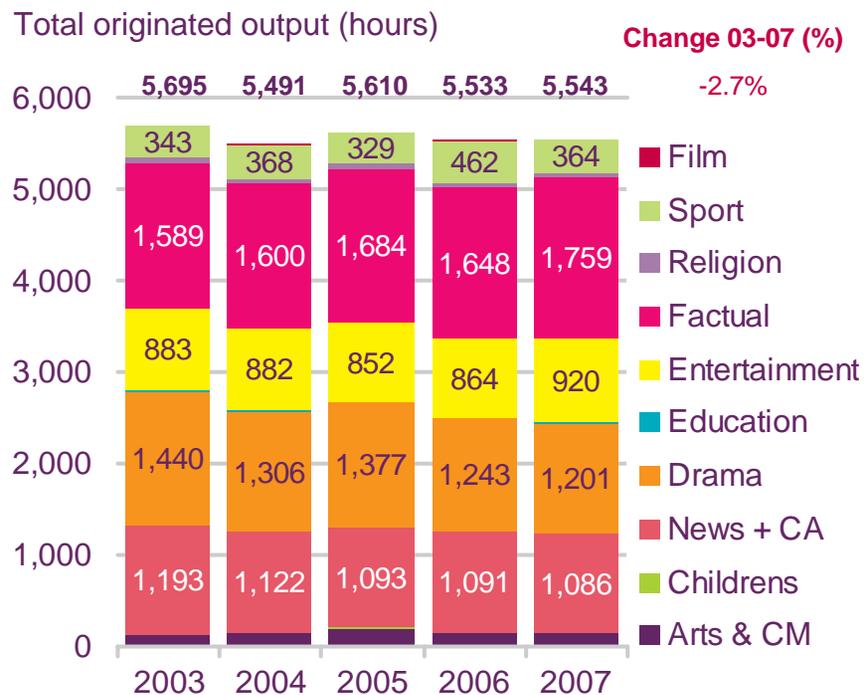
Proportion of 2006/07 schedules (%)



- The five public service broadcasting channels tend to offer a high proportion of UK-originated content in any one year.
- The PSB portfolio channels also broadcast originated output but not to the same extent as the five main PSB channels since acquisitions and repeats play a more significant role.
- But the five main PSBs and their portfolio channels together tend to broadcast proportionately more originated output than other digital-only channels.

Note: All figures are for 2007 except for 'Other multichannels', which are 2006. Comparisons are therefore indicative only

Peaktime originated output, 2003 - 2007

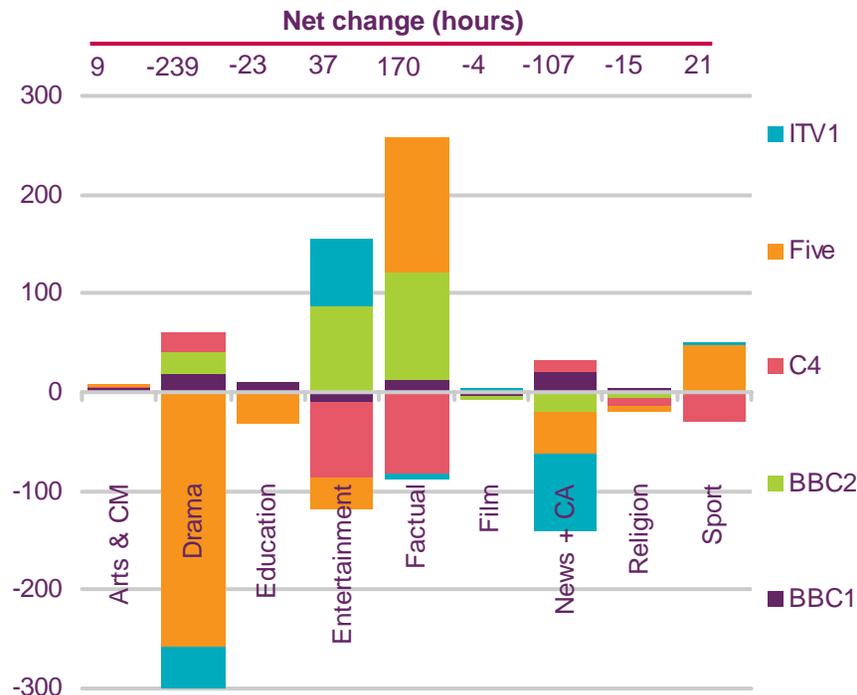


- Overall hours of originated output in peaktime fell by 2.7% between 2003 and 2007, from 5695 to 5543.
- Factual, Drama, News and Entertainment accounted for 90% of all originated output in 2007. Sport made up a further 7% of originated hours.
- The distribution of hours has changed very little since 2003, where the same four genres also made-up 90% of all originated hours.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only.

Changes in peaktime originated output, 2003 - 2007

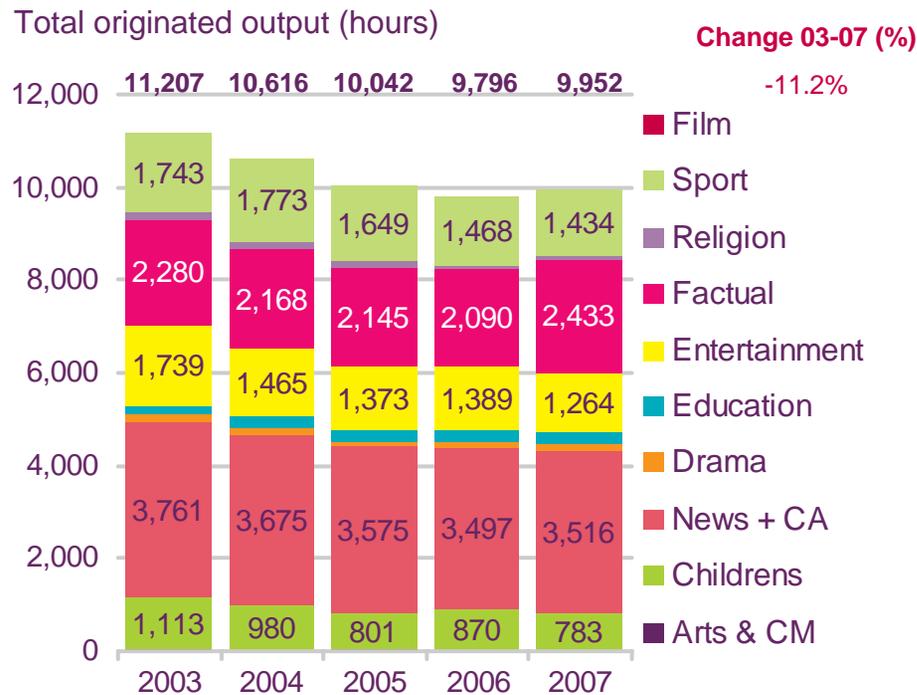
Changes in hours of output (per year) 2003-2007



- Originated peaktime output per year fell by 152 hours between 2003 and 2007.
- The largest net reduction was experienced in Drama (driven in large part by the cancellation of Family Affairs on Five).
- The most significant net increase was seen in Factual output, driven increasing hours from Five and BBC Two.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only. Figures have been included in the chart where they are substantial and can be accommodated in the relevant bar.

Daytime originated output, 2003 - 2007

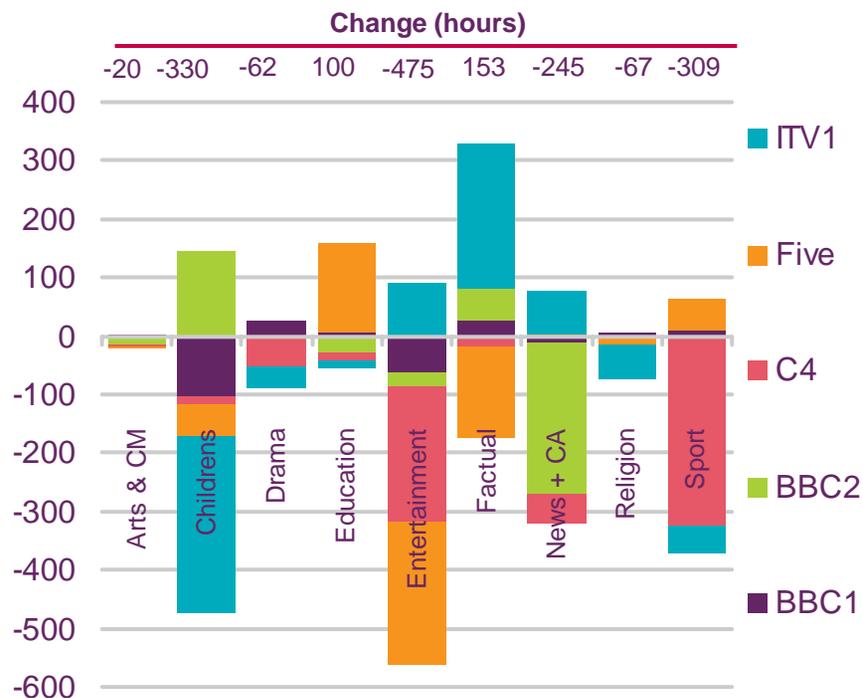


- Overall hours of originated daytime output fell by 11.2% between 2003 and 2007 from 11,207 to 9,952.
- News, Factual, Sport Entertainment and Children's content accounted for 95% of hours in 2007, the same proportion as in 2003.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only..

Changes in daytime originated output, 2003 - 2007

Changes in hours of output (per year) 2003-2007

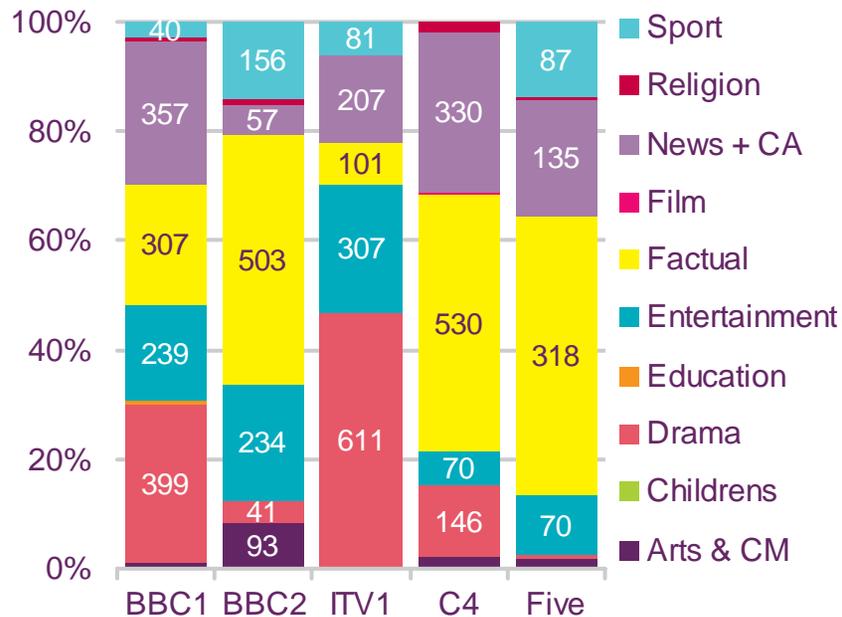


- Daytime originated hours fell by 1,255 hours between 2003 and 2007.
- The most significant net reductions were experienced by Entertainment, Children's and Sport.
- The largest net increase was, as in peaktime, in Factual output.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only. Figures have been included in the chart where they are substantial and can be accommodated in the relevant bar.

Peaktime originations by genre, 2007

Proportion of originated hours (%)

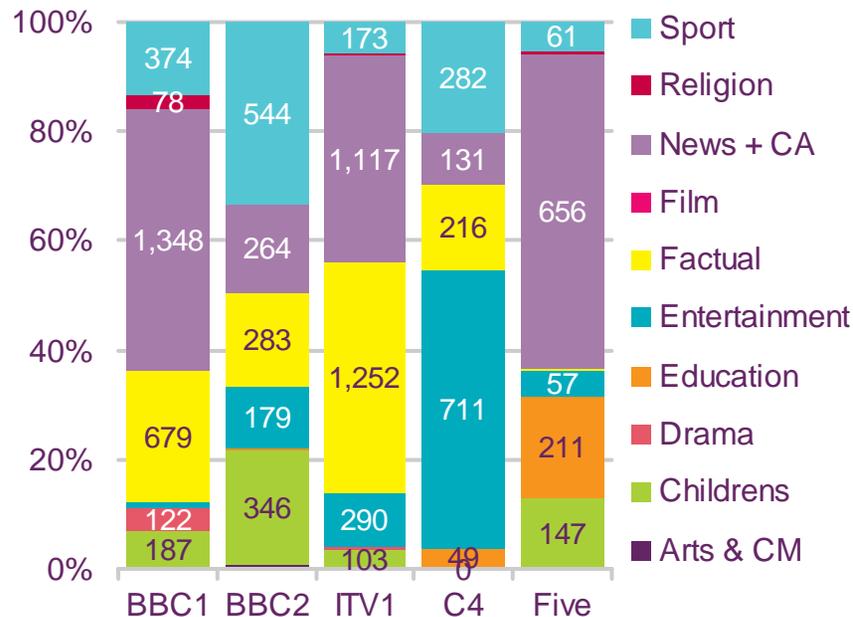


- The distribution of originated hours among genres varied significantly among the five main PSB channels in 2007.
- In peaktime, Drama played a significant role on ITV1 and BBC One. It was also prominent on Channel 4.
- Entertainment output was a prominent feature of the peaktime schedules of BBC One, BBC Two and ITV1.
- Factual played a notable role on BBC Two, Channel 4 and Five, while originated hours of News were sizeable on all five main PSB channels except BBC Two (note that Newsnight is not captured in this chart).

Source: Ofcom/Broadcasters. Includes the five main PSB channels only.

Daytime originations by genre, 2007

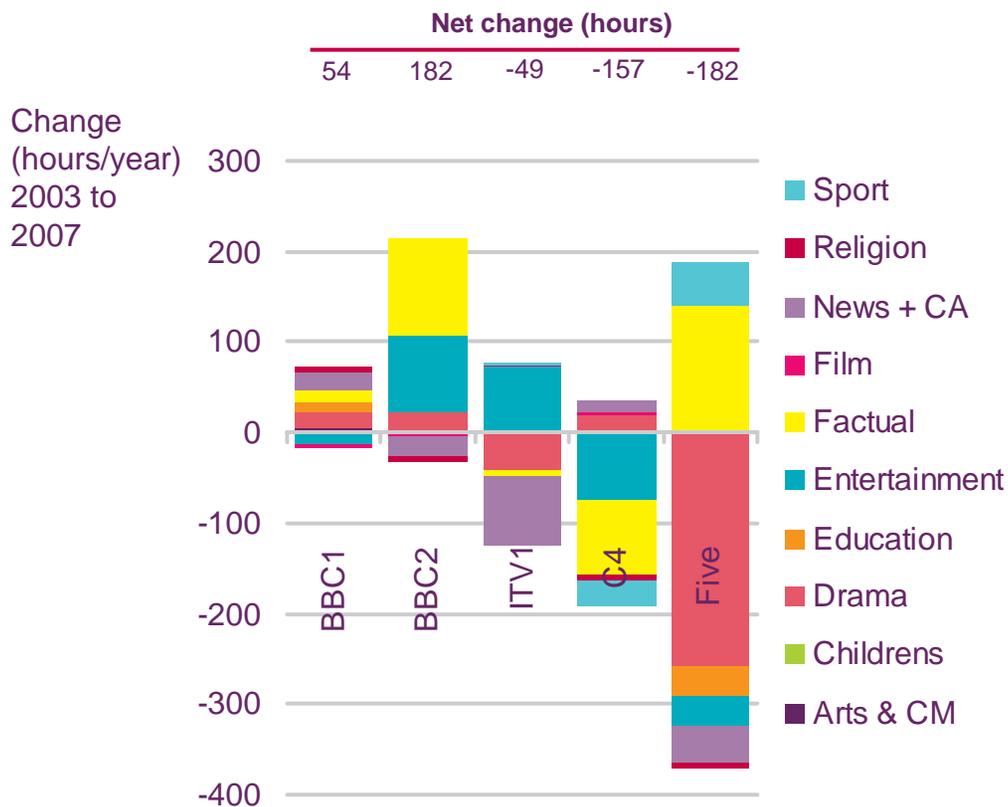
Proportion of originated hours (%)



- News stands out as a significant contributor to daytime originated hours on Five, ITV1 and BBC One.
- Factual was also a notable feature of the originated schedules of BBC One and ITV1 in daytime. Sport was significant on BBC Two and Channel 4.
- Entertainment played its most prominent role in the daytime schedule of Channel 4 while Children's output was most substantive on BBC One, BBC Two and Five.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only.

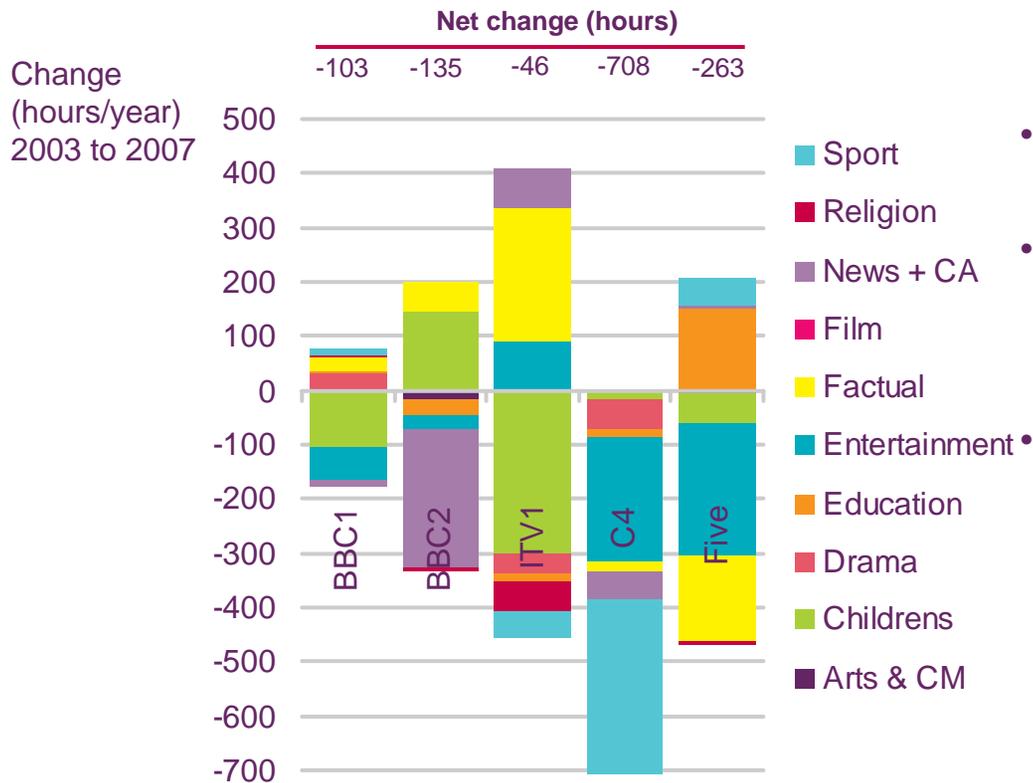
Changes in peaktime originated output by genre



- In peaktime, the most significant changes overall in patterns of originated hours were experienced by BBC Two (a rise of 182 hours since 2003) and Five (-182).
- On BBC Two, increased hours of factual and entertainment-based output were the principal drivers of the increase.
- On five, drama was the main driver of the reduction in hours, offset somewhat by rising hours of originated factual output and sport.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only. Figures have been included in the chart where they are substantial and can be accommodated in the relevant bar.

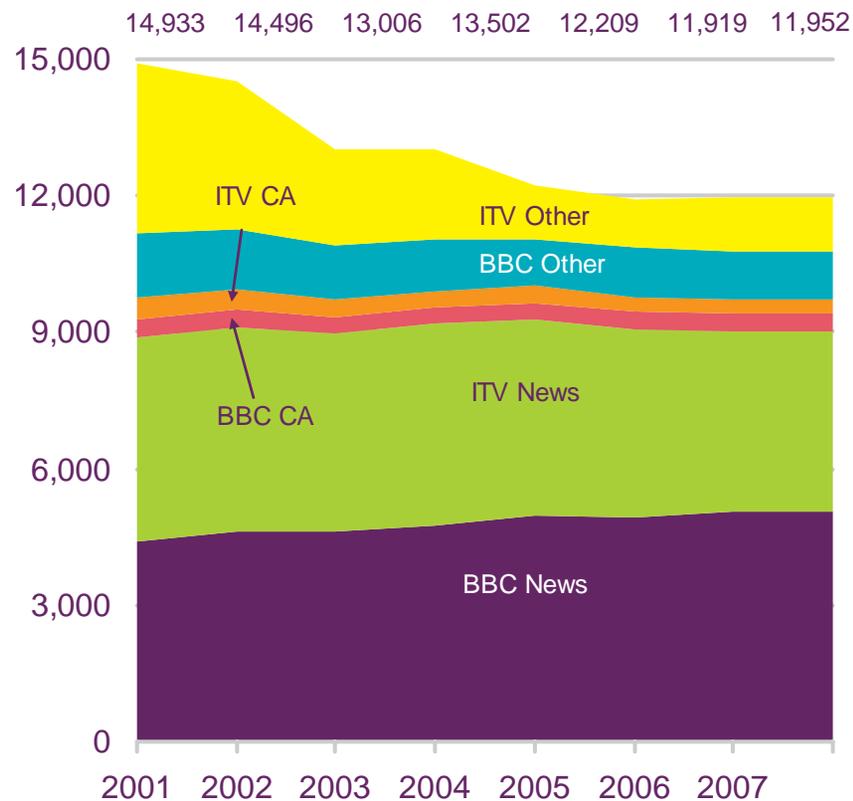
Changes in daytime originated output by genre



- In daytime, hours of originated output fell across all five public service broadcasting channels.
- The most significant reduction (708 hours between 2003 and 2007) was experienced by Channel 4. This was driven mainly by falling hours of Entertainment and Sport.
- ITV1's daytime output was notable for the change in the mix of genres between 2003 and 2007. Children's originated output fell substantially over the period, replaced by hours of originated factual output, along with some Entertainment and News.

Source: Ofcom/Broadcasters. Includes the five main PSB channels only.

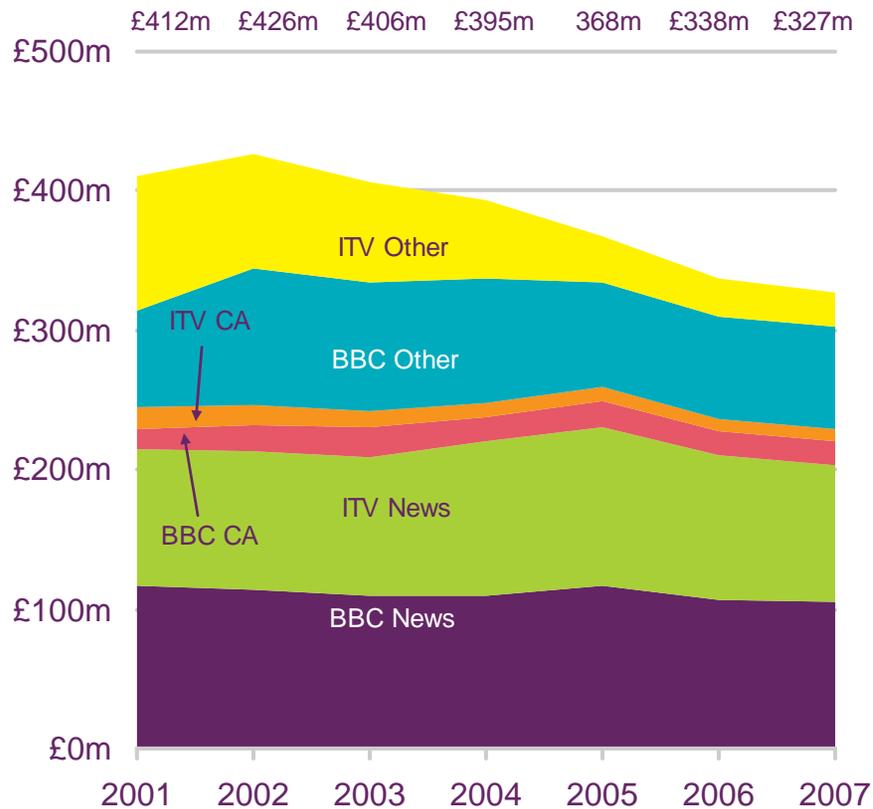
Regional output, 2001 - 2007



- Originated hours of regional output experienced a reduction of 8% between 2003 and 2007.
- ITV 'Other' (i.e. non-news, non-current affairs output) was the main driver of this reduction, though there were also more modest reductions in BBC hours 'other' hours too.

Source: Ofcom/Broadcasters. Includes BBC One, BBC Two and ITV1/UTV/STV

Regional spend, 2001 - 2007



- Spend trended commensurate with hours of originated nations/regions output.
- It fell by 19% between 2003 and 2007. Much of the reduction was once again explained by falling hours of ITV1 'Other' output.

Source: Ofcom/Broadcasters. Includes BBC One, BBC Two and ITV1/UTV/STV. Spend expressed in 2007 prices.

Spend on all originations by the five main PSB channels and S4C analogue



- Since 2003, spend on UK originated output by the five main PSB channels and S4C analogue fell by £0.3m in real terms from £3.0bn to £2.7bn.

Source: Ofcom/Broadcasters. 2007 prices. Includes BBC One, BBC Two, ITV1, Channel 4, Five and S4C analogue. Includes networked and regional output.

All PSBs spend on networked originations versus non-PSBs



- The higher proportion of PSB schedules devoted to originated output is reflected in Ofcom's estimate of PSB spend on networked originations versus that of non-PSB channels.
- The former invested £2,485m in UK-originated content in 2007 with the latter contributing a further £268m.
- But spend by the five main channels and the BBC's digital services on networked output fell by an average of 3.8% per annum in the three years to 2007. By contrast expenditure by non-PSB channels rose at an average annual rate of 4.6% over the same period - driven mostly by increased expenditure by the commercial PSB's portfolio channels.

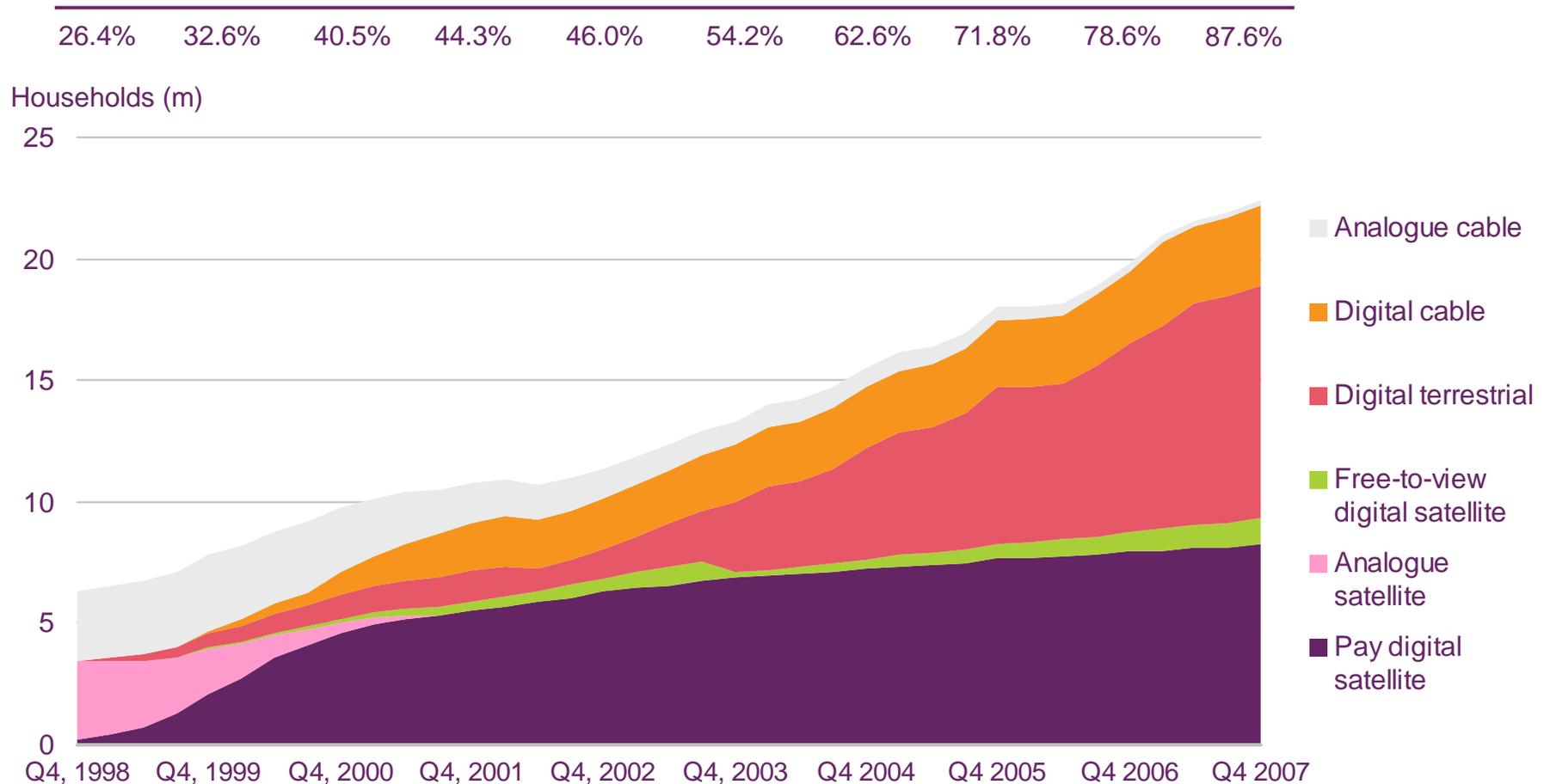
Source: Broadcasters and Ofcom calculations/estimates

Note: PSBs include the five main channels and the BBC's digital-only services. The figures exclude sport and movies. All figures in 2007 prices. Includes networked spend only.

Digital television take-up

DTV take up on main television sets

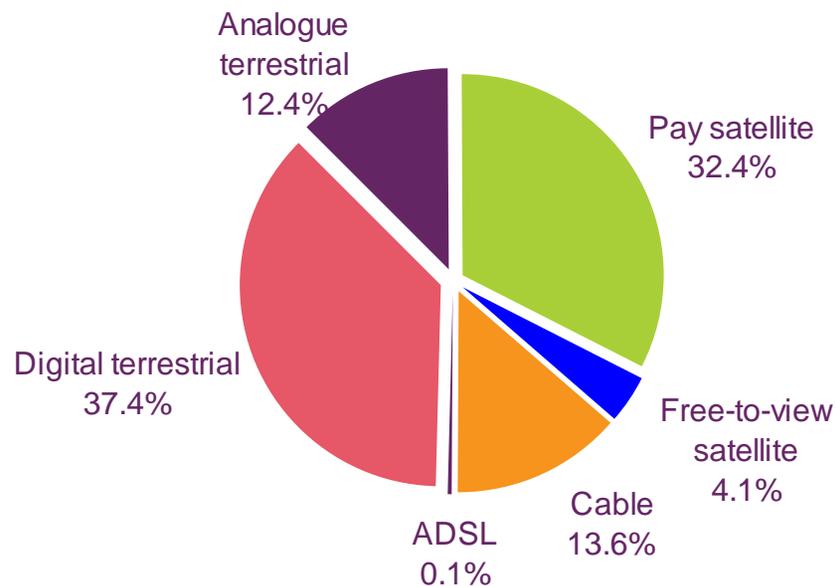
% of homes



Source: Ofcom

Devices connected to the primary television set in the home

% of TV homes

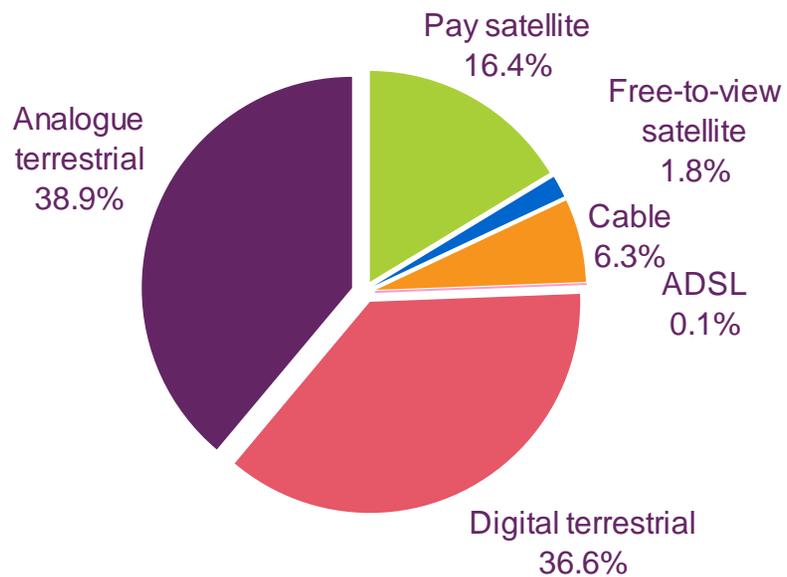


- Multi-channel television was connected to 87.6% of main television sets at the end of Q4 2007.
- Digital Terrestrial television was the most popular choice with a 37% share of homes; pay satellite was the second most popular with 32% of homes.

Source: Ofcom

Devices connected to all television sets

% of TV sets



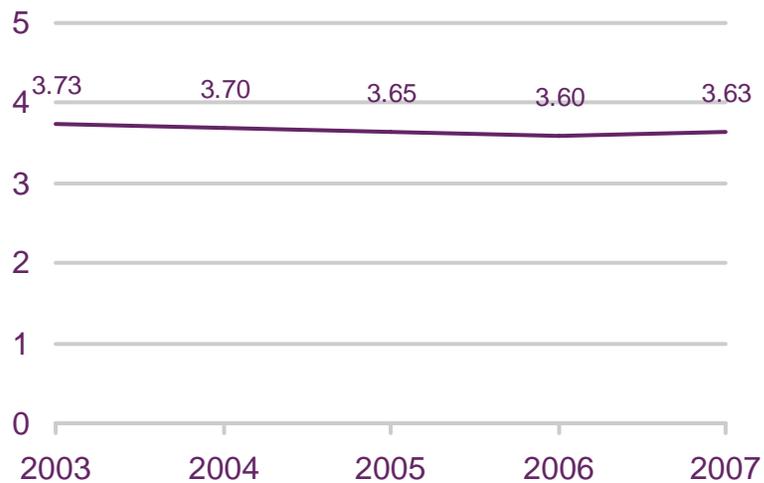
- Across all television sets, 39% are still receiving an analogue terrestrial signal.
- Digital terrestrial television is the second most popular choice with a 37% share of all television sets.
- Pay satellite ranks third with a 16% share.

Source: Ofcom

Audience viewing habits

Total television viewing

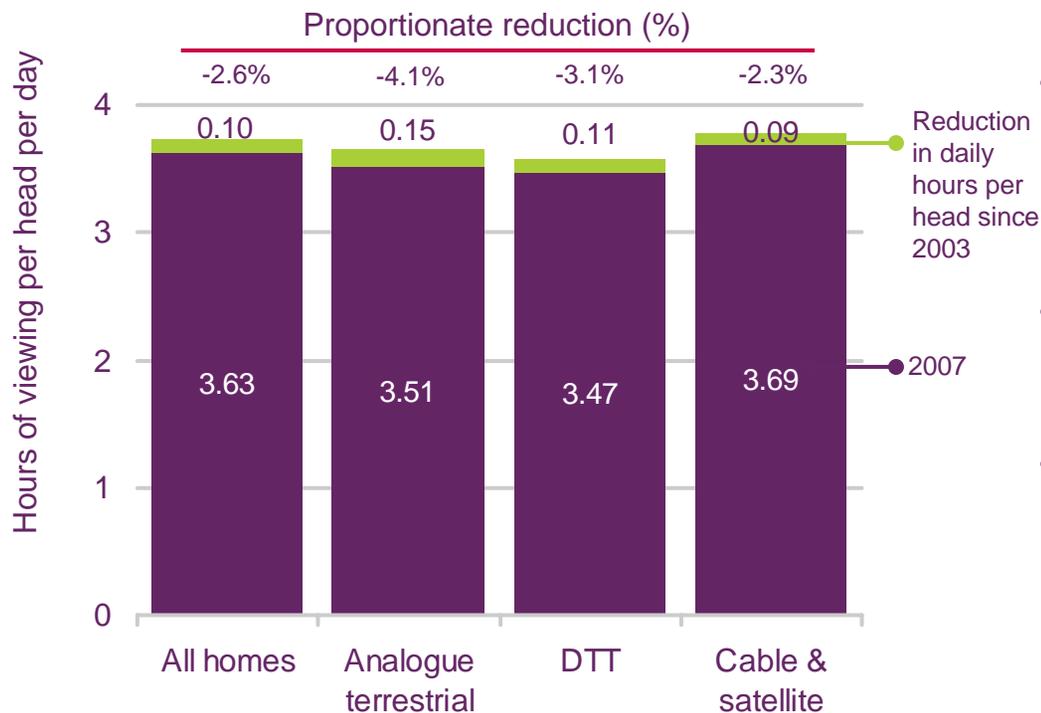
Hours of viewing per head per day, all homes



- Total daily television viewing stood at 3 hours and 38 minutes per person per day in 2007.
- Average viewing fell by 2.7% (or six minutes per person per day) in the four years to 2007.
- This equated to an annual average reduction of less than 1%.

Source: BARB, all homes, all day, all individuals 4+

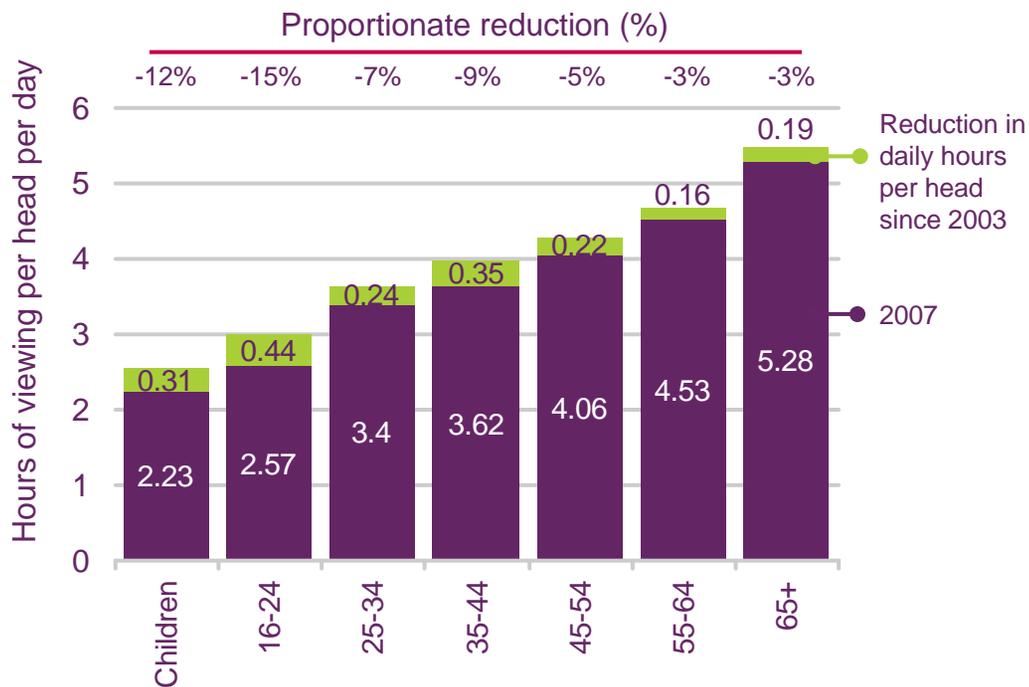
Television viewing by platform



- Viewers in CabSat homes watched the most television in 2007 – three hours and forty one minutes per head. Those in Freeview homes watched the least – three hours and twenty eight minutes.
- Reductions in viewing since 2003 were most pronounced among ATT viewers, where viewing times fell by nine minutes per day or 4.1%.
- That was followed by Freeview viewers, where viewing fell by 7 minutes per day or 3.1%.

Source: BARB, all day, all individuals 4+

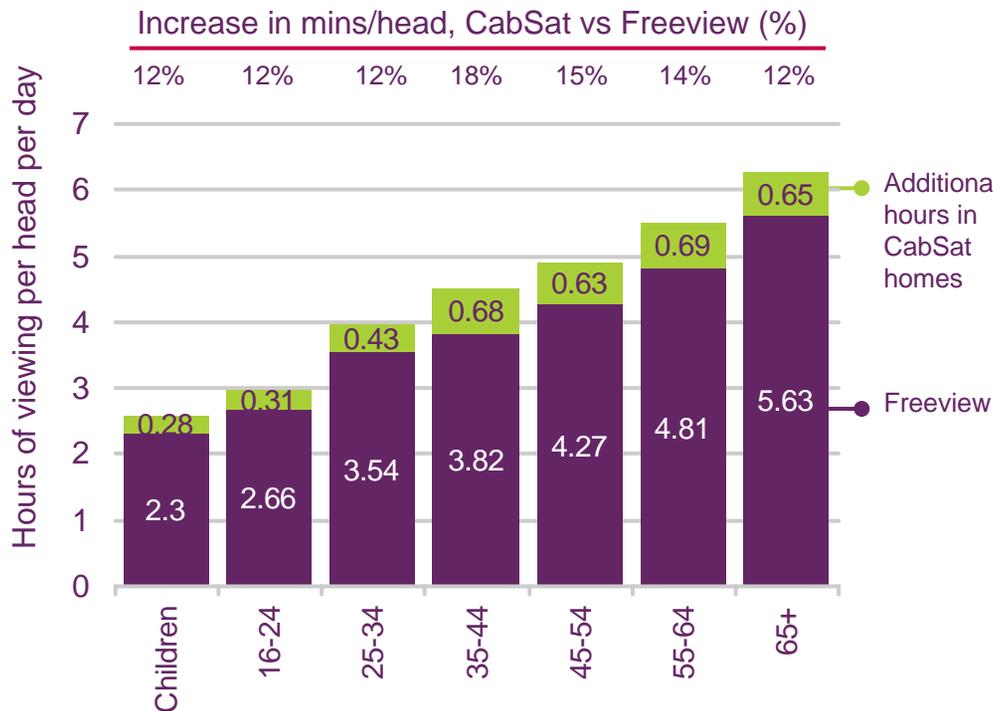
Television viewing by age



- Viewing times rise with age – people over 65 watch over twice as much television as those who are 16-24.
- While television viewing has dropped across all age groups since 2003, the reduction was most pronounced among those under 44 and largest among viewers 16-24.

Source: BARB, all homes, all day

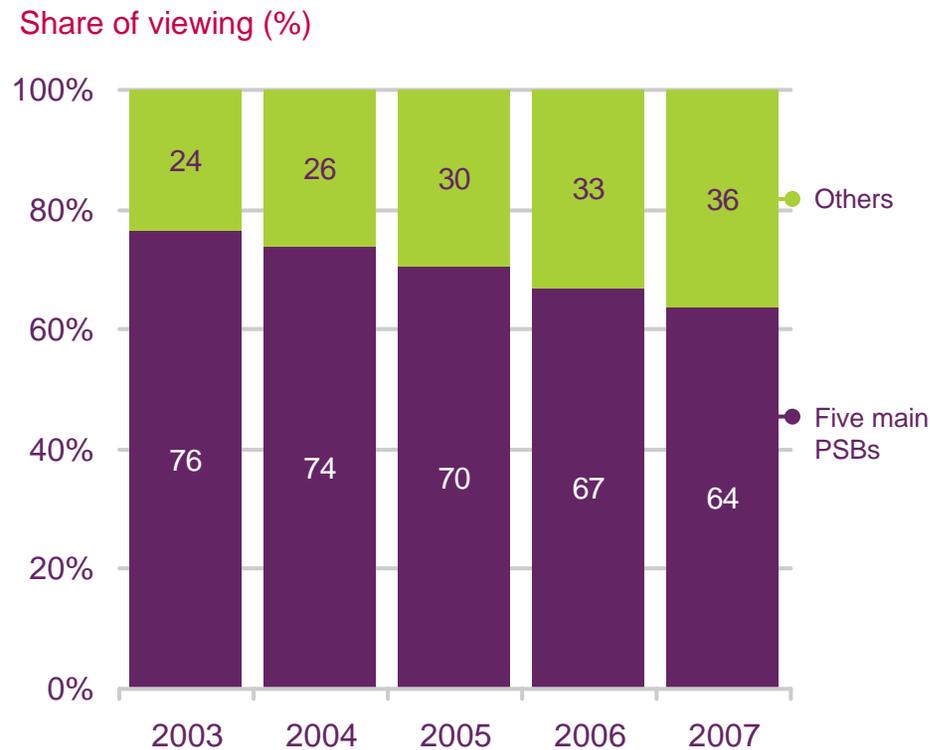
Television viewing by age and platform



- Combining age with platform reveals a consistent pattern of higher viewing levels among CabSat viewers when compared to Freeview counterparts.
- The effect is most pronounced among 35-44 year olds, where CabSat viewing times were 22% higher than Freeview in 2007
- The platform effect diminishes among the youngest and oldest viewers.

Source: BARB, all day

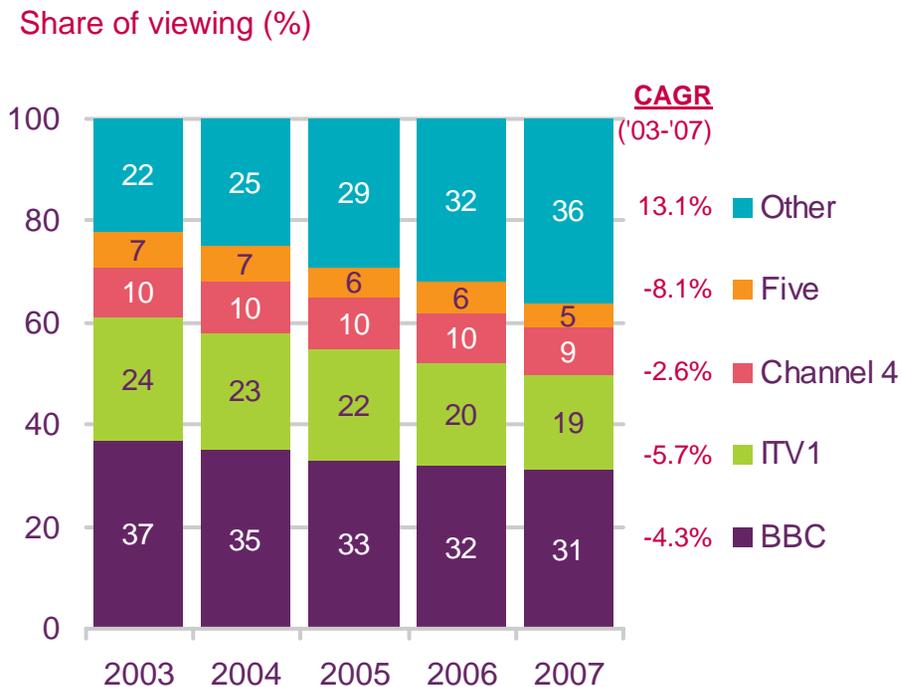
Distribution of viewing share



- The five main PSB channels experienced a 12 percentage point reduction in share between 2003 and 2007.
- This was driven by a variety of factors:
 - Migration from analogue to digital television
 - Choice of DTV platform – CabSat or Freeview
 - Reductions in viewing to PSB channels from those already with a DTV platform

Source: BARB, all homes, all day, all individuals 4+

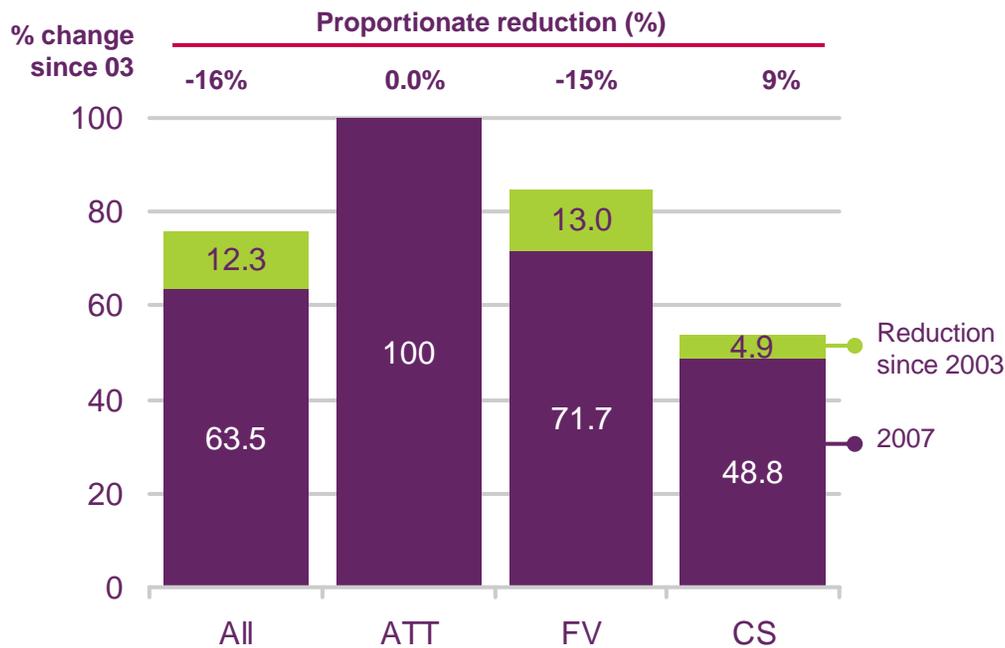
Distribution of viewing share by PSB channel



- The five main PSB channels commanded a 64% share of viewing in all homes in 2007 - down from 88% in 2003.
- Losses were incurred by all five channels, but proportionately speaking Five experienced the most significant reduction with an average fall of 8% p.a. over the period.
- It was followed by ITV1 (-5.7%) and the BBC's two main channels (-4.3%)

Source: BARB, all homes, all day, all individuals 4+

Changes in the viewing share of the five PSBs

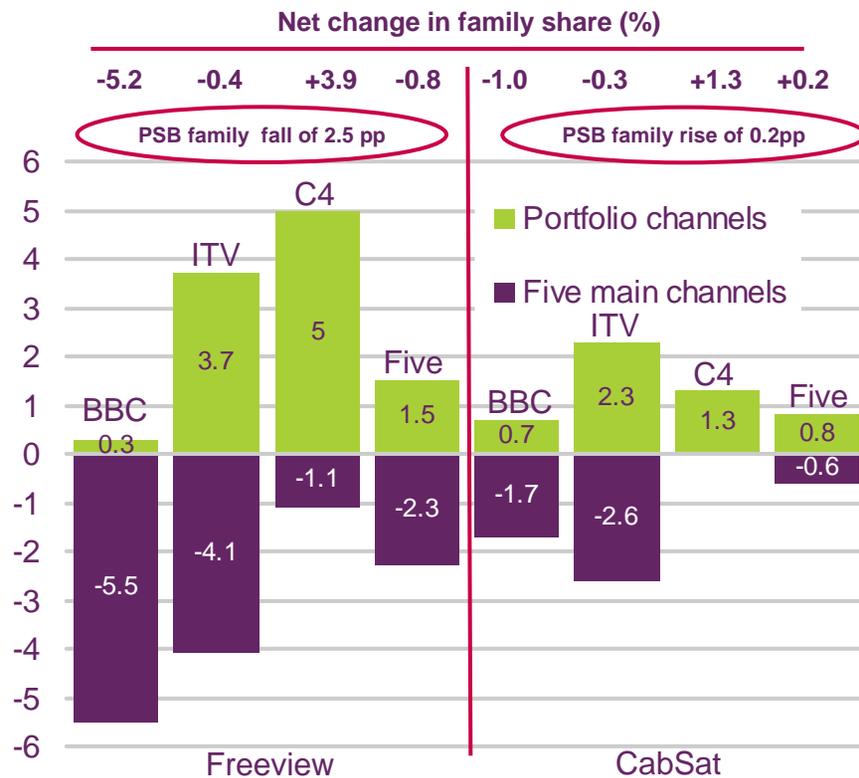


- Changes in the five public service broadcasting channels' share of viewing varied by platform.
- They lost 9% of their viewing share in CabSat homes between 2003 and 2007 and 15% of their viewing share in Freeview homes.
- Overall, taking account of viewing in analogue terrestrial homes, their share of viewing fell by 16% over the period.

Source: BARB, all homes, all day, all individuals 4+

Changes in the five main PSBs' portfolio share

Net changes in share since 2003

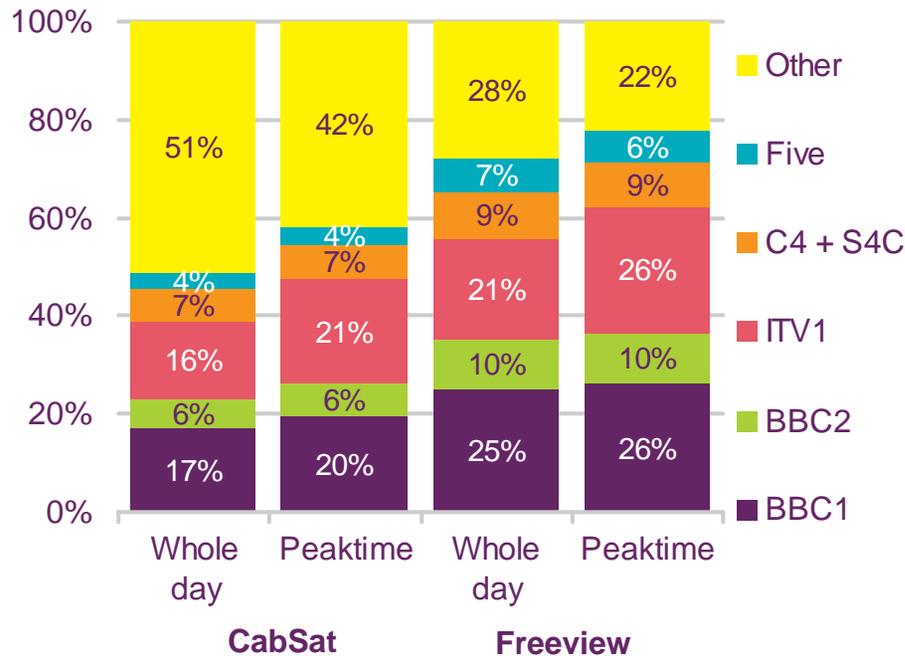


- Reductions in viewing share by the five main channels were offset by the growing popularity of the PSB's digital-only channels.
- Channel 4 benefited most from this effect, gaining 3.9 percentage points of share in Freeview homes since 2003 and 1.3 percentage points in CabSat homes.
- The BBC benefited the least, losing 5.2 percentage points in Freeview homes and 1.0 percentage points in Cabsat homes. This is explained by the fact that the BBC was first to launch its digital services and, therefore, by 2003 had already seen its digital-only services build share - for ITV, Channel 4 and Five, that process only really began in 2004.

Source: BARB, all homes, all day, all individuals 4+

PSB share in peak and all day, 2007

Share of viewing (%)

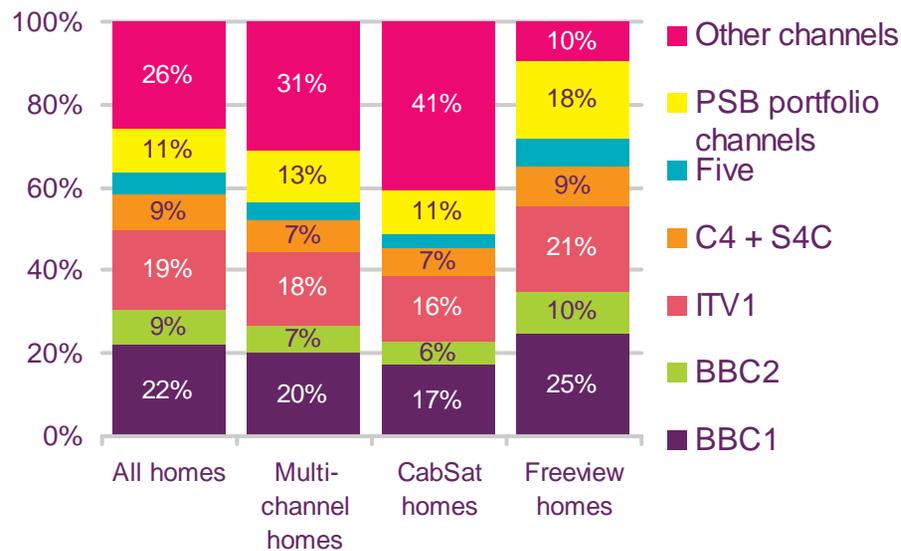


- In peaktime, viewers tend to come back to the five main PSB channels.
- In 2007, across CabSat homes and Freeview homes, share rose in peak for the five networks - from 49% to 58% in the former case and from 72% to 78% in the latter.

Source: BARB, all homes, all individuals 4+

Freeview platform viewing is dominated by PSB portfolios

Share of viewing (%)

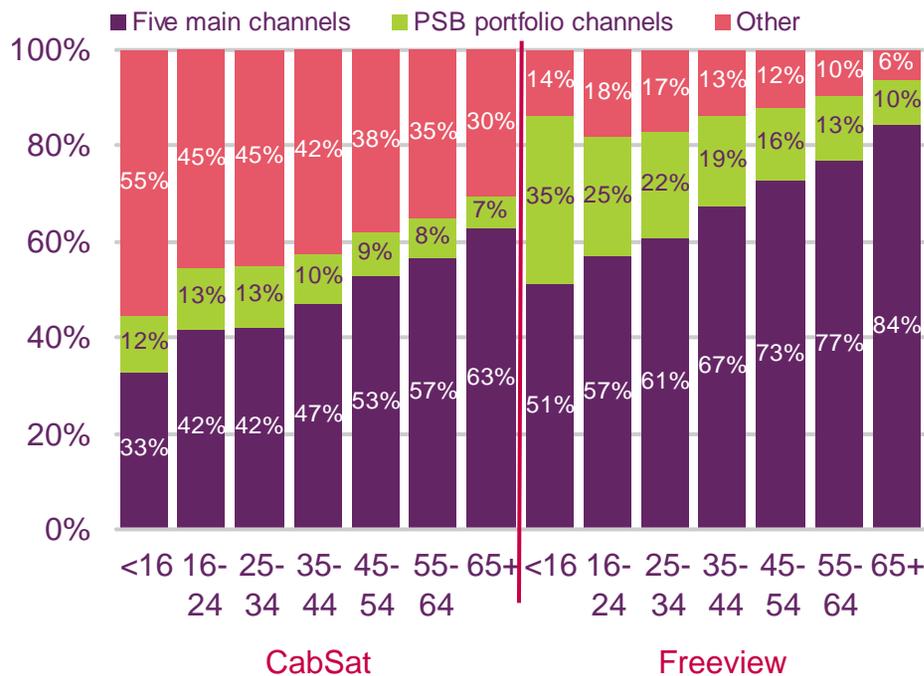


- The five main PSB channels and their associated portfolios accounted for 74% of viewing in all homes.
- In Freeview homes, that figure rose to 90% thanks to the popularity of both the five main channels and their associated portfolio channels.
- By contrast, in CabSat homes those channels outside of the PSB family commanded a 41% share of viewing in 2007.

Source: BARB, all homes, all day, all individuals 4+

...though PSB popularity varies significantly by age

Share of viewing (%)

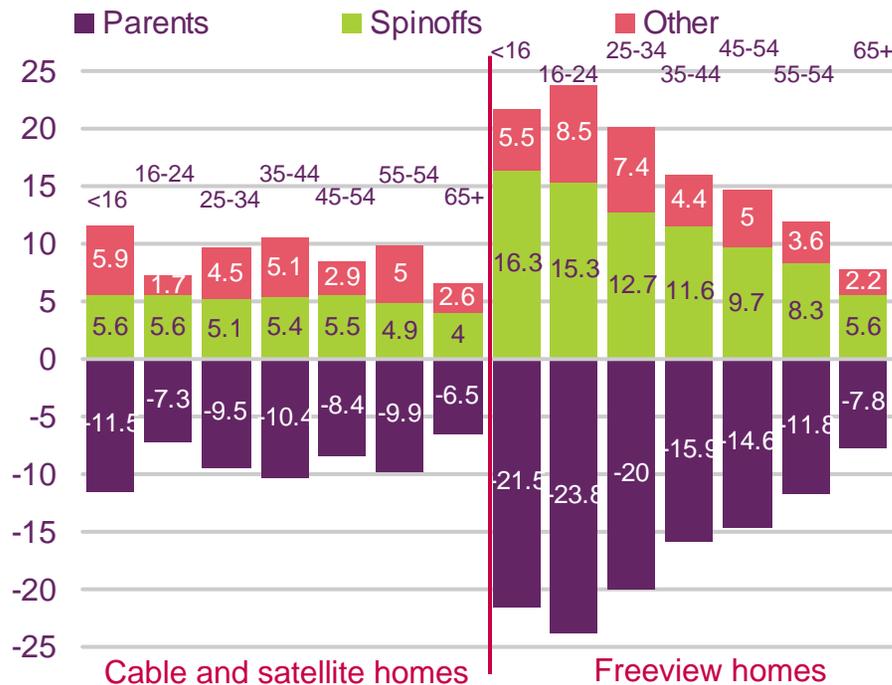


- The distribution of share among channels varies not only by platform but also by age.
- Generally speaking, the share of the five main PSB channels rises with age. Conversely, the PSB portfolio channels and the non-PSB family channels' share falls with age.
- Within the mix, PSB portfolio channels command a higher share of viewing across all ages in Freeview homes than they do in CabSat homes.

Source: BARB, all homes, all day

Disengagement with PSB portfolios among younger viewers

Change in share (percentage points), 2003 - 2007



- Between 2003 and 2007, the main five PSB networks experienced reductions in share across all ages in both CabSat and Freeview homes.
- The reductions tended to fall with age.
- The redistribution of share from the five main channels was increasingly concentrated among PSB portfolio channels among older viewers in Freeview homes; but in CabSat homes, the portfolio channels tended to attract a consistent 4-6 percentage points of the share lost by the five main networks, with non-PSB family channels accounting for the rest.

Source: BARB, all homes, all day

Audience research

Introduction to reading the audience research results (1)

- This audience research section comprises a summary giving the key findings, followed by an extensive data annex which goes into each area in more depth, giving narrative summaries of each section as well as data charts and graphs
- The main surveys used for analysis are the Ipsos Mori PSB quantitative survey (2260 UK adults, face to face); the Ipsos Mori PSB deliberative workshops (7 day-long workshops x 30 people around the UK); and the ongoing PSB Tracker (7000 UK adults per year, telephone). Data from an Ofcom online study (3003 internet users from a panel) is also used. Results from the PSB quant study from 2003, reported in the 2004 PSB Review, are also provided (see Annex for more details of methods). Data from Ofcom's Media Literacy Audits of adults and children are also referred to (Audits to be published in Q2 2008)
- The results at times can give slightly divergent results. This is inevitable given the different methodologies of the studies. The purpose of this slidepack is to provide an overview of key take-outs, to act as a benchmark. Some of the individual data may not "fit" the overview, but there will be good reasons as to why it is not being used and why other data points have been used instead to create the overview finding
- "Do as I say, not as I do": this axiom applies to the discrepancies between TV opinions and habits just as it applies across a range of activities in life. What we know we want and need in theory is not necessarily what we consume or do. Such a split between thoughts and behaviour is no less or more "wrong" than in other areas: actual viewing behaviour does not "prove" that viewers can't be trusted in terms of their views about what's important to provide

Introduction to reading the audience research results (2)

- Viewer opinions often lag changes in output. Perceptions about channel provision are enduring, and even if levels of output change, it may be some time before these changes percolate through to changes in perception
- Differences of method and type of questioning, even within same survey, mean that different responses are at times evident – for example, if you ask someone to name their top five genres out of a list of 17, then the % scores reported will be lower than if you ask them a question about each of the 17 genres separately. Similarly, if you ask for agreement with particular attitude statements you may get higher results than if you have a whole series of statements that people must agree or disagree with
- Finally, when reading what follows, it is important to remember that a single score can be judged quite differently depending on the context. There are two main ways to “read” quant data. It is possible to examine the absolute % responses, in order to say that x % of respondents answered a particular way. It is more subtle, however, to triangulate this overall % with whatever contextual or relative information is also available – i.e. how this score looks relative to other responses. Ultimately, this is a subjective judgement call – a score of 78% is of course high – but if such a score is actually 10th in a list of 20 other elements, then it can also be called “mid-ranking” in relative terms

Audience Research Summary

The purposes of television

- The four key functions of TV are perceived (simultaneously) to be:
 - the provision of entertainment/relaxation;
 - news/information and learning;
 - a sociable activity; and
 - a tool for societal cohesion
- The latter view is one that is particularly resonant at present given perceptions of societal fragmentation, and in turn underlines the importance of UK content
 - People think it very important that TV provides an accurate reflection of the UK (and elsewhere) to itself
 - People want to see proportional representation onscreen – this means showing minority groups and cultures, but not at the expense of the mainstream
 - TV is important as a tool for societal cohesion (75% think TV should help to promote understanding of different religions, cultures and lifestyles, PSB Review survey 2007). Comparison of 2003 and 2007* research indicates there has been a growth in valuing this role. Across most age groups TV remains a main source of news and information.

Comparisons of 2003 and 2007 results need to be treated with caution - see appendix for details

Role of main channels compared to digital and internet (1)

- There is continued attachment to the main five TV channels, despite the growth of digital channels and the internet. This is visible among those with cabsat, broadband users and younger people, although these groups are also keen on their digital media provision and would indeed miss it most.
- Across the age-groups and backgrounds, there is a wider repertoire of channels used, an increase in time spent watching digital channels (from one quarter to one third share), and a more fluent understanding of them vs. four years ago. That said, high importance is placed on the main five channels; digital channels are perceived as a complement to, not a replacement for, the main channels.
 - Comparison of 2003 and 2007 survey results* suggest that overall satisfaction for TV as a whole has increased (56% in 2003 to 79% in 2007, PSB Review survey)
 - Portfolio channels are perceived to cater for specific audiences/interests and to be more experimental. In contrast, there is strong appreciation of the “serendipity” of coming across programmes on the main TV channels (PSB Review deliberative)
 - Cabsat viewers appreciate digital channel delivery, which offers, in their view, increased choice and convenience, and spend half their TV time watching these channels. For some media interests digital channels are more popular than the main channels, with just under one third naming digital channels as their main source for knowledge about topics such as arts and science compared to 19% naming the main TV channels. However, cab/sat viewers value the main five channels, particularly as a source of UK and national/regional news. They are just as satisfied with these channels as all 16+ but more likely to be satisfied with TV as a whole (85% v 79%; PSB Review survey)

Comparisons of 2003 and 2007 results need to be treated with caution - see appendix for details

Role of main channels compared to digital and internet (2)

- Among Freeview viewers the main channels are a main source for most, if not all, media needs
- 16-24s watch the least amount of the main channels, at just over half their TV time (source: BARB). That said, they value programming on the main 5 channels and are more likely to be satisfied with TV as a whole than all 16+ (see *Young People slides*).
- There has been a significant increase in the amount of time spent online, particularly among 16-24s.
- The use of the internet as a source for various types of media content has increased from 2003 to 2007, most notably for personal interests and knowledge about topics - although at a UK-wide level TV is still more popular. This varies, however, by audience, particularly among 16-24s. For example for the areas of personal interest, knowledge about topics and discovering new things and finding out about people with similar interests, the internet is the main source for a sizeable number of 16-24s with broadband (PSB Review survey, 2007)
- Television and internet are perceived to offer often complementary functions.
 - TV is seen as having a greater role as a tool for shaping public opinion and ensuring diversity. TV is also predominantly the medium for entertainment, although the internet is also used “for fun” by younger people.
 - While both are seen as sources of personal learning, the internet appears to be used to consolidate and refine already-existing knowledge

PSB importance and satisfaction – by Purpose

- Ofcom’s PSB Tracker survey asks regular viewers to channels to rate their delivery of purposes and characteristics via a series of statements (see data annex for details)
 - **Purpose 1** is of most importance to people, and seen as best delivered, along with elements of programme quality.
 - **Purpose 2** is seen to be delivered well by BBC Two.
 - **Purpose 3:** some elements are seen to be delivered well across the channels; others are more focused on the BBC.
 - **Purpose 4** is seen to be closely aligned with news channels, the BBC and Channel 4.
 - **PSB characteristics** are variably applied across the channels, and some single-genre channels are rated particularly highly
- Over the last year, levels of importance relating to aspects of PSB have not changed (in last 5 waves since start of 2007, there has been minimal change in the importance given to each purpose and characteristic)
- Trends in levels of satisfaction show a largely positive story: since 2005 ratings have mainly stayed the same or increased, for example:
 - **Purpose 2:** BBC One, BBC Four and Five increased significantly; Channel 4 decreased
 - **Purpose 4:** satisfaction higher across a number of channels
 - **Original:** BBC One significantly higher, ITV1 also higher
 - **Engaging:** some signs of decrease for ITV1 and Channel 4
 - **Innovation:** no particular change except for increase in BBC Three and BBC Four

(NB increases to Five, BBC Three and BBC Four in part explained by changes in profile of regular viewers over time)

PSB “gaps” : importance versus satisfaction

- While levels of perceived importance are nearly always higher than levels of perceived satisfaction, due to the theoretical/hypothetical nature of the former and the actual nature of the latter, nonetheless the relative gaps between the importance and satisfaction ratings of various elements of PSB are useful to note, as measured on the 2007 PSB Tracker quantitative survey. It is the *relative* size of the satisfaction gaps for the different elements of PSB purposes and characteristics that is most interesting, rather than the absolute figures.
- Focusing on those PSB purposes and characteristics that are rated by over 70% of people as being important, the biggest gaps between importance and satisfaction with delivery when considering the PSB channels as a whole are:
 - **Wide range of high quality and UK-made children’s content** (78% v 47% - a gap of 31 percentage points (pp) [based on parent/carer responses])
 - **Trust** (84% importance v 53% satisfaction – a gap of 31 pp)
 - **Enough new UK programmes** (72% v 42% - a gap of 30 pp)
 - **Innovative** programmes – with new ideas and different approaches (71% v 44% - a gap of 27 pp)
 - **Engaging content** – programmes people want to watch (81% v 52% - a gap of 29 pp)
 - **Regional/national news** (78% importance v 53% satisfaction – a gap of 25 pp)
- In other words, some key areas of dissatisfaction appear to be related to the amount of UK, original (in both senses of the word) content, for adults and for children. The issue of trust is perhaps a factor of the fieldwork for this question taking place in the latter half of 2007 after various high-profile stories relating to this issue
- While overall, levels of importance relating to other elements nations and regions provision are not as high as for the elements of PSB above, there are significant gaps between importance and delivery of non-news programmes, and with network portrayal - Northern Ireland and Scotland show gaps of 46% and 40% respectively in terms of **portrayal of the nation to the rest of the UK** (Wales gap is 29% and England 25%)
- These former factors around content also emerged in the first PSB Review, along with issues of scheduling and range of programming

Summary

PSB importance and satisfaction – sub-groups



By age

- Younger people, aged 16-24, were less likely than older people to rate some PSB elements as important, for example “showing interesting programmes about history, science and arts”, “showing new UK originations”, “having trustworthy news” and “showing programmes that help people understand what is going on in the world”. That said, the majority still agreed that each of PSB purposes and characteristics were important, with trustworthy news and engaging content being highest in importance for 16-24s. There were some differences among older people, compared to younger age groups; most notably, the importance of purpose 2 statement “showing interesting programmes about history, science or arts”, and the purpose 3 statements “portraying my region well to the rest of the UK” and “providing a range of good quality programmes about my region/nation” where each of these increased in importance with age.

By socio economic group

- There were some differences by socio-economic group. For example, people from DE groups were more likely to think that non-news regional programmes were important compared to people from AB groups, as well as portrayal of their region/nation to the rest of the UK, and the provision of UK-made dramas and soaps and making the viewer more interested in subjects. For most other elements ABs tended to rate the statements the same or higher than DEs, that said, a majority of people from DE groups thought each element was important
- There are some differences in levels of satisfaction for most purposes, except Purpose 1 statements, and ‘showing interesting programmes about arts, science etc’ ABs are more likely than DEs to score the statements lower. ABs are less satisfied than DEs, most notably for portrayal of region/nation to rest of UK (26% of ABC1s are satisfied v 43% of C2DEs), wide range of national/regional ‘non-news’ programmes (23% v 40%) and high quality, UK children’s programmes (35% v 52%). For most characteristics, except showing programmes with new ideas, ABs are likely to be less satisfied than DEs.

Ethnic minority groups (EMGs)

- The majority of people from ethnic minority groups thought that each of the purposes and characteristics statements was important. That said, people from ethnic minority groups are less likely than the UK overall to rate many elements of PSB as important - in particular trust in channel (73% v 85%) and trustworthiness of news (80% v 87%)
- They are more likely to rate reflecting different kinds of cultures within the UK (80% v 69%); reflecting interests and concerns of people like me as important (76% v 69%); and indicatively more likely to rate children’s programmes as important
- Levels of satisfaction are generally similar to the UK overall figures, except for some Purpose 1 elements – People from EMGs are less likely to be satisfied for ‘trustworthiness of news’ (57% v 65%); ‘help understanding of the world’ (60% v 68%); as well as Purpose 3 coverage of big national events (58% v 65%) and regional/national news (47% v 54%)
- Among EMGs the biggest gaps between importance and satisfaction are for reflecting different kinds of cultures (80% v 48% - 32pp gap) and reflecting interests and concerns of people like me (76% v 46% - 30pp gap), regional news (77% v 47% - 30pp gap), UK children’s programmes (83% v 50% - 33pp gap), other regional programmes (63% v 30% = 33pp gap), programmes that make me stop and think (78% v 47% = 31pp gap)
- In terms of TV provision as a whole, EMGs are less likely to be satisfied with the main five channels (although 69% still say they are) and more likely to be satisfied with digital commercial channels (76%).

PSB programme genre provision on the main channels

- Provision of different programme genres on the main five channels is seen as key by all audiences
 - Certain types of programme are perceived as more vital to supply than others, with News (93% of people thought it was important to be provided on the main channels), National/regional news (88%), Current affairs (85%), garnering the highest scores, followed by programmes made in UK/reflect life in UK (83%) and national/regional current affairs (83%).
 - Provision of children's programming was deemed important by the majority of adults (77%) and this rose to 85% among parents. The majority of people thought that most programme genres were important. (PSB Review survey 2007)

Differences by sub-group

- There were only a few significant differences in responses between all people and cabsat viewers; however, when asked if, in the future, some PSB genres could be provided on digital channels, cabsat viewers tended to be more open to this, excepting news and current affairs (PSB Review survey 2007)
- EMGs were less likely to think it is important for the main channels to provide certain genres, although scores were still high - UK news (88% among people from different EMGs v 93% of all 16+), national/regional news (80% v 88%), UK drama (67% v 75%) and UK comedies (65% v 72%) whereas there were higher levels of agreement v all 16+ for programmes that appeal to different cultural tastes (71% v 64%) and programmes that include different EMGs (72% v 59%) and religious programmes (58% v 49%)
- There were some differences by socio economic group, most notably current affairs (90% of ABC1s think it is important v 81% of C2DEs) and comedies made in UK (69% ABC1s v 76% C2DEs), other regional/national programming (72% ABC1s v 77% C2DEs), programmes that appeal to a wide range of cultural tastes (69% ABC1 v 60% C2DEs) and religious programmes made in the UK (52% ABC1s v 45% C2DEs)
- Younger people were somewhat less likely to think provision of news (89% v 93% for 16+), current affairs (76% v 85%), national/regional current affairs (73% v 83%) and serious factual (76% v 82%) is important, but scores are still high. They were more likely to think UK Comedies were important (82% v 72%) as well as programmes which include people from different EMGs (67% v 59%)

Summary

Plurality of PSB provision

- Plurality of provision is seen as key. While the BBC is perceived as the main PSB player, plurality of voice is seen as vital for reasons of encouraging competition for quality, ensuring a choice of types of content, and also as a (political) counterweight to BBC views
- Certain types of programme are perceived as vital to supply from more than one source: in order of results: news, current affairs, nations/regions news, programmes that reflect life in the UK, programmes that get people interested in different topics and serious factual. Then current affairs about your nation or region, children's programmes, drama, other regional/national programmes and comedy. For parents, children's programming was one of the most important genres. Of less importance, but still with a small majority of people (57%) thinking it important, was programmes for different cultural interests. Also under half (41%) thought religious programming made in the UK was important. (PSB Review survey)
 - Comparison of 2003 and 2007 results indicate there has been a rise in the perceived importance of plurality in UK news and regional/national news supply

UK content

- Primary concerns regarding PSB content are that the programmes are of a high quality, entertaining and informative (and some overseas programmes and non-PSB channels are seen by some audiences to deliver these attributes).
- However, the issue of UK origin is felt to be very important and a priority for the main TV channels. For example, 83% of people said that it was 'important that programmes made in the UK are shown on the main TV channels'.
- In the deliberative research participants thought UK content was very important in order to reflect life in the UK today and, in many cases, participants felt they identified more readily with UK programmes. There was concern that without UK content there was a risk that the UK could see its cultural identity eroded.
- TV's power to aid societal cohesion was strongly linked to UK content. With the perceived increase in social fragmentation, the importance of UK content may increase further in the future. (UK programming was also a means of catering for the different groups in UK society)
- UK content was felt to be particularly important for all types of news and current affairs, children's programmes, and then drama, comedy and serious factual programming
- That said, there was a place for overseas programmes and non-PSB channels which were seen by some audiences to possess attributes of high quality and be informative and entertaining and provide different perspectives of the world

PSB perceptions and expectations of the main channels

- The BBC remains the cornerstone of PSB, and expectations of the BBC are higher than they were in 2003 across a range of issues on standards and types of programming
- ITV1 is seen as a popular channel with its contribution to UK network and regions/nations news provision of particular importance
 - Responses to ITV1 statements about non-news national/regional programmes, the provision of serious documentaries, and – conversely – its need to be free to focus on what it wants – all rate higher than they did in 2003, indicating perhaps a more polarised opinion or habit among respondents
- Channel 4's innovative remit is widely understood. The PSB Tracker results show that Channel 4 is sharply differentiated by age, with younger people rating it more highly. It is also more highly rated by people from ethnic minority groups. It is regarded as the alternative voice to the BBC, with an output considered to be more 'edgy' and which engages with young people
- While some of the quality of Five's output is questioned, it is perceived to present issues in a friendly and accessible manner, which is easier to understand
- PSB Tracker results (2007) show distinct differences in the perceived role of each of the channels. In broad terms,
 - BBC One is seen to deliver most on P1, elements of P3 and some characteristics;
 - BBC Two on P1, P2 and some characteristics;
 - ITV1 on P3, P1 and some characteristics;
 - Channel 4 is rated most on P1 and characteristics;
 - Five is also rated most on P1 and characteristics;
 - NB: Many non-PSBs are mainly rated mostly on their characteristics (albeit ratings are lower than for some PSB channels), with the exception of some that rate highly on P1 and P2 provision. (See *PSB on digital channels*)

PSB on portfolio channels

- Provision of portfolio channels by the main broadcasters is seen to be important by just over half of respondents (53%) (PSB Review survey, 2007). This rises among younger people and people with cabsat. (68% of 16-24 year olds, with importance declining with age, 60% of cabsat viewers). However among people with Freeview there is no significant difference versus all people, with 57% thinking they are important
- In our deliberative study some participants considered that not just BBC portfolio channels but also commercial spin-offs could be PSB destinations (e.g. BBC Three associated with UK comedy; More 4 with UK drama, serious factual and current affairs)
 - PSB Tracker results (2007) show that among regular viewers BBC News 24 scores more than the main PSB channels on issues relating to news
 - *NB: Single-genre digital channels tended to score particularly highly, as someone who regularly watches the channel is by definition doing so because they like that particular genre.*
 - Portfolio channels were seen to have a different role to the main five channels, specialising in niche or experimental programming, and were also more convenient – not bound by traditional schedules (PSB Review deliberative, 2007)

PSB on commercial digital channels

- Some commercial digital channels have *small loyal* audiences for whom the channel fulfils a need and are seen to deliver 'PSB type' content. Single genre commercial channels (most notably The Discovery Channel, UKTV History and Sky News) were rated very highly *among their viewers* across PSB purposes 1 and 2, less so on 3 and 4, and rated highly on most characteristics (PSB Tracker, 2007)
- Most of the other selected non-PSBs monitored on the PSB Tracker were seen to revolve less around PSB Purposes and more around the characteristics of PSB, such as high quality, engaging content
- The deliberative research (PSB Review deliberative, 2007) identified that commercial digital channels could have a role to play in providing PSB type content from overseas which could help understanding of different perspectives and cultures. However, it is important to consider the reservations raised by non-viewers regarding issues of trust, credibility and quality, (partly due to relative newness of channels – less familiarity led to scepticism). There was concern about the extent to which impartial content could be provided vs being vehicles for parent corporations to impart views (e.g. Fox News). Each channel may appeal to a certain audience but did not have universal appeal.
- There were also concerns about using the commercial channels as a means of delivering 'official' PSB content in the future (reasons included the commercial imperative being at odds with PSB, restricting access to those who can afford to pay was perceived to be against the ethos of PSB of providing content deemed of social importance to all)

The internet and PSB

- Across the research, similar views emerged about the role of the internet in comparison to that of TV:
 - **Internet** = personal learning, deepening existing knowledge and relationships
 - **TV** = a normative tool for shaping public opinion, understanding of difference
- The internet is the main source for certain sections of the population most notably for the areas of personal interest, finding out about people with similar interests and discovering new things. However, TV remains key for a range of media needs, particularly for all types of news and entertainment (PSB Review survey)
- Platform substitution was discussed in the deliberative workshops. Participants thought that content on the internet is seen as a *complement* to rather than a *replacement for* PSB content on the main five channels (the exception being programmes for schools). This was driven by concerns about access, skills and trust (PSB Review deliberative)
- That said, provision by the main channels of online content which offered additional content about different topics, including news and entertainment was seen to be important by half of the public, rising to 70% among those aged 16 – 24 and those with access to broadband.
- The ways in which people are prepared to access broadcaster content is changing. There is a substantial minority of people (44%) who support the main broadcasters' provision of TV content via their websites that allow content to be watched when you want to watch it. This rises to 56% among 16-24s and 59% among people with broadband. (PSB Review survey)
- When an online panel was asked to evaluate PSB purposes and characteristics in relation to the internet, high importance was placed on news content, trustworthy content, compelling and high quality content. Two-thirds of those responsible for children felt that children's content was important for the internet to provide (PSB Online survey)
 - Delivery 'gaps' (the relative difference between importance and satisfaction ratings) are visible for trust, high quality content, and children's supply. Local news is also perceived as being delivered less well
 - When asked specifically about the websites of the main TV channels, satisfaction levels are higher than the internet generally for trustworthy content and children's provision. While the internet in general is rated higher on many PSB characteristics such as engaging, challenging content, as well as content about the local area.

Levels of trust in TV and internet, and the extent of online navigation

- The issue of trust is an important element of PSB provision. **Levels of trust** in the internet vary according to the type of user and the formulation of the question
 - Online panel responses show that the internet is less trusted in terms of the accuracy of its content in general than TV is – 33% say they trust the internet compared to 45% for TV (PSB online survey)
 - According to Ofcom’s Media Literacy Audit (MLA) the two platforms are equal - some 42% of internet users say they trust the internet, and 41% say they trust TV (MLA 2007)
 - When people are asked at a more granular level about particular TV channels, levels of general trust are higher – over 70% of the BBC’s regular viewers say they trust it, and three-fifths of ITV1 and Channel 4 regular viewers. Levels of trust are higher in particular news/factual single-genre channels such as BBC News 24 (79%); UKTV History (81%), and Sky News (83%) (PSB Tracker)
- Levels of trust in the internet are also likely to be related to the extent to which people make wide or narrow use of the platform. **Navigation of online content** – its findability – was a key PSB determinant in the deliberative research: people felt that content needed to be easily accessed in order for it to be deemed public service.
 - When asked about online behaviour in a typical week, internet users tend to say they mostly stick with what they know, although one in five (19%) says that they visit a lot of new sites (MLA 2007)
 - This is stratified by age – rising to one quarter of 16-24s, and only 10% of over 65s – although people aged 45-54 also appear to be more likely to visit new sites

Willingness to pay for PSB in the future

- Research into willingness to pay to maintain current provision was undertaken in 6 deliberative workshops set up across the UK*
- By means of an expert witness presentation from Ofcom, participants were informed about the current funding of PSB on the main 5 channels and the economic pressures on this model due to audience fragmentation. Most participants were unaware of the PSB obligations and funding of the commercial channels and were surprised to discover this as they tended to see them as purely commercial organisations
- Having informed participants of the current situation, they the discussed the issues and debated whether they were willing to pay more to maintain current levels of PSB provision
 - *A majority in the deliberative research were willing to pay more for the same amount of PSB;*
 - *A significant minority were not willing to pay more but believed they would get used to a price increase;*
 - *A small minority were not prepared to pay more – who were less likely to value PSB in general*
- The reasons why the majority of participants were prepared to pay more were: provision of PSB was deemed important, could play an increasingly important role in a ‘fragmented’ society; and desire to secure plurality for key programme genres was key (e.g. to keep a ‘check’ on BBC, increase competition which many say helped to maintain quality, people valued choice and the provision of different perspectives). Given these benefits, many thought an increase in cost not that significant
- Participants’ priorities centred on the following key programme types, which were priorities for plurality - UK network news, nations / regions news, current affairs, and high quality UK content (applied to a range of programme genres, including drama, comedy, children’s)
- In the 2004 deliberative research, a majority of participants also concluded that they would be willing to pay more to maintain current levels of provision across the channels

*approx 180 participants

PSB future provision/substitution

- When asked about whether programme content could be moved from the main channels onto either digital channels or the internet in the future, most respondents wanted most programme genres to stay on the main TV channels. This included people with cabsat and internet users (PSB Review survey)
 - News, national/regional news and current affairs were seen to be the key elements overall, as well as for plural supply on the main TV channels in the future.
- When participants in the deliberative workshops were asked to make hard choices in the context of cost saving, they were prepared for serious factual, drama and comedy to be provided by a combination of the main TV channels and digital channels (PSB Review deliberative).
 - Approx half of participants (mostly parents) were prepared to see children’s programming provided on portfolio channels, and indeed there were some benefits such as a safe dedicated space, availability, and convenience associated with this.
 - Programmes for schools were deemed able to be provided online, as the internet was associated with interactivity and learning; and access was not deemed an issue due to schools/university access.
- However, all participants found these choices hard and issues were raised concerning wide availability, navigation and findability in relation to shifting content to either digital channels or the internet (e.g. participants emphasised the need for clearly signposted digital channels which could be found among the vast number of digital channels available). Suggestions were made that the portfolio channels should develop distinct roles and functions, eg BBC Three for developing and nurturing comedy, this could also encourage associations with certain channels and help viewers find the types of programmes they wanted.
- When discussing whether the commercial digital channels could be used as a means of delivering ‘official’ PSB content in the future, participants were reluctant to have to pay a subscription for PSB content which they felt strongly should be available to everyone. Given the social importance placed on PSB, many believed that restricting access to those that could afford to pay would be against the ethos of PSB. There were also concerns that the commercial imperatives of these channels may be at odds with PSB’s aims and it may be hard to find PSB content within the schedule, as well as raising issues about trust
- When discussing substitution of PSB content from the TV to the internet, participants believed there was a risk that certain groups in society such as elderly, those with long term health issues or financially vulnerable would/could be excluded. Even if access were provided for all, there was also the issues of skills/confidence, navigation, findability, as well as suitability of the medium for the content, the different experiences offered by TV (social, family time) vs internet (solitary) and the underlying belief that certain types of content, such as news, had to be provided on the main TV channels.

Children's programming

- Provision of PSB programming for children is highly valued by parents and non parents. High quality UK content is key.
- Plurality in PSB provision is deemed important in order to cater for different ages, genders, tastes and interests. Three quarters of adults 16+, which rises to 80% of parents thought 'it important that channels other than the BBC provide children's content that reflects life in the UK' (PSB Review survey, 2007)
- One of the largest gaps in importance vs satisfaction identified in the PSB Tracker (2007) was for high quality and UK-made children's content (78% v 47% - a gap of 31%)
- *The Future of Children's Television Programming report (2007)* identified gaps in current provision for older children (8-12 years), UK drama and factual programmes and younger teens
- There has been a dramatic increase in time spent online from 3.5 to 11.0 hours among 8-15 year olds (Children's Media Literacy Audit, 2005-2007). One of the largest gaps in importance vs delivery in the PSB Online survey (2007) was for high quality online content for children (68% thought it important whereas only just over half of respondents were satisfied with current delivery).
- *The Future of Children's Television Programming report (2007)* also identified low levels of satisfaction among young teenagers (13-15 years) and their parents regarding provision of television in general and PSB content specifically for this age group. (NB: This age group, however, acknowledged that television did not play as important a role in their lives compared to when they were younger.)

Young people 16-24 (1)

- Young people are not disengaged with TV; they are more likely than all 16+ to be satisfied with TV as a whole (85% v 79% for 16+) and with the digital commercial channels (75% of 16-24s with multichannel v. 60% among 16+ with multichannel)
- Younger people are most likely to embrace digital channels and the internet
 - Support for the portfolio channels is strongest among 16-24s, with 68% claiming 'it is important that the main channels provide additional digital channels' v 53% for 16+ (PSB Review survey, 2007). This also applies to broadcaster websites, with 70% claiming 'it is important that the main tv broadcasters provide websites which provide additional content' versus 53% for 16+
 - There has been a dramatic increase in the time people claim they spend online at home, from 6.7 hours to 10.0 hours (Media Literacy Audit, 2005 and 2007), although young people still spend more time watching TV than online
 - Although just under half of 16-24s would find it hardest to live without TV (49%), among 16-24 year old broadband users the internet takes the lead with 46% saying they would miss it, compared to 40% for TV (PSB Review survey, 2007).
- Young people's main reasons for watching TV are for relaxation/passing the time and fun (78%) as it is for all 16+ (70%). Their main reasons for going online are similar to all adults, with finding out or learning ranking top (36% vs 47% of 16+) A higher proportion of young people claim their main reason for going online is for contacting people (28% vs 23% for 16+) and for entertainment - 26% compared to one fifth of 16+ (Media Literacy Audit, 2007)
- TV is a key source of entertainment and all types of news (PSB Review survey, 2007). However, among broadband users the internet is the main source for a number of interests such as discovering new things (63%), personal interests (41%), knowledge about topics (34%), and finding out about people with different (34%) and similar interests (57%)

Young people 16-24 (2)

- According to the PSB Tracker, although younger people are less likely to rate many elements of PSB as important, there are still high levels of support for PSB, particularly for trust (79%), trustworthy news programmes (80%) and engaging content (80%), with less importance attached to informal learning elements of PSB (Purpose 2 statements) and UK originations compared to all 16+. Levels of satisfaction, on the other hand, are slightly higher than for all 16+ for many of the purposes and characteristics
- The overall areas where there are “gaps” between importance and satisfaction are for elements similar to all 16+, most notably for trust (79% v 59% - 20pp. gap); engaging content (80% v 63% - 17pp gap). In addition, there is gap for national/regional news quality (72% v 51% - 21 pp gap)
- According to the PSB Review survey, with regard to provision of PSB programme genres, younger people were somewhat less likely to think News (89% v 93% for 16+), Current Affairs (76% v 85%), national/regional current affairs (73% v 83%) and serious factual (76% v 82%) were important, but scores were still high. They were more likely to think UK Comedies were important (82% v 72%) and programmes that include people from different ethnic minorities.

Nations and regions (1)

- Levels of support for various elements of nations/regions provision are nearly always higher in the **devolved nations** than in **England**, although within **England** opinions vary considerably - and are lowest of all in the London region
- Levels of support have stayed at similar levels or increased since 2003 – there are no signs of the appetite for nations/regions provision abating

Nations and regions news

- News remains the key element of nations and regions provision.
- Satisfaction levels are fairly high (and a comparison with 2003 results suggest this has increased), although they tend to be somewhat lower for **England** and for **Scotland** compared to **Wales** and **Northern Ireland**
 - Within **England**, satisfaction is higher in the north and lower in central/east, and particularly in London
 - Comparatively lower levels of satisfaction in **Scotland** may be linked to higher usage of press for national/regional news

Nations and regions (2)

“Non-news” programmes

- Opinions are more mixed, but views in the **devolved nations** are more positive than those in **England** – although within England, opinions are more positive in northern England than in the south/east, particularly London
- Current affairs programmes are more highly rated than other types of content
- The *principle* of dedicated programmes for each devolved nation is articulated strongly given the particularity of cultures and politics, but deliberative research indicates that satisfaction with “non-news” programming is lower than for network programmes, not least because of the overriding importance of programme quality for respondents. These views were also expressed in 2004 research
- The PSB Tracker (2007) reveals a wide gap between importance and satisfaction for non-news among people in **Northern Ireland** (37% gap), **Wales** (31% gap) **Scotland** (33% gap), and **England** slightly less so (28% gap)

Representation of nations and regions on the network

- Seen as particularly important by those living outside London, although in relative terms in the PSB Review survey and the PSB Tracker, it is a less important attribute of PSB than news/information. That said, around three-quarters of respondents see “programmes that take place in different parts of the UK” as important to provide on the main channels (PSB Review survey)
- Dissatisfaction with the amount/type of network representation was apparent in our deliberative research from all the workshops except that in London – and was also strong in our research conducted in 2004
- There are wide gaps between viewers’ perceived importance of and satisfaction with PSB television “reflecting the nation/region well to the rest of the UK”, particularly for **Northern Ireland** (46% gap) and **Scotland** (40% gap); (**Wales** = 29% gap and **England** = 25% gap) (PSB Tracker, 2007)

Nations and regions (3)

Plural supply of nations/regions news

- Plural supply is very important to people, particularly in the **devolved nations**, given the particularity of politics and culture, and the lack of alternative media in **Wales** and **Northern Ireland** compared to usage of press for regions/nations information in **Scotland**
- Levels of support for plural supply of news have increased slightly across all nations since 2003 (PSB Review survey, 2003 and 2007), and to a greater extent in the devolved nations

Indigenous language provision

- Desire for this is strongest in **Wales** (69% think it is important that some programmes are shown in Welsh)
- 53% of people in **Scotland** say it is important for television to provide some such programmes
- 29% of people in **Northern Ireland** say programmes in Irish are important, 20% say programmes in Ulster Scots are important

Substitutability of new platforms

- There appears to be little current support for new platforms as a substitute for TV provision of nations and regions programming. Some three in five people disagreed that nations and regions news provision on TV was redundant given the amount of information on the internet – and this figure rose to two-thirds of daily internet users
- One quarter (27%) agree that “websites about my local area are a better way of finding out information for me than the main TV channels”, a rise from 4% in 2003 (NB this rise will be linked to increased internet take-up over this period)

Comparisons of 2003 and 2007 results need to be treated with caution - see appendix for details

Audience Research Data Annex

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Main roles of television

Four main roles of television (1)

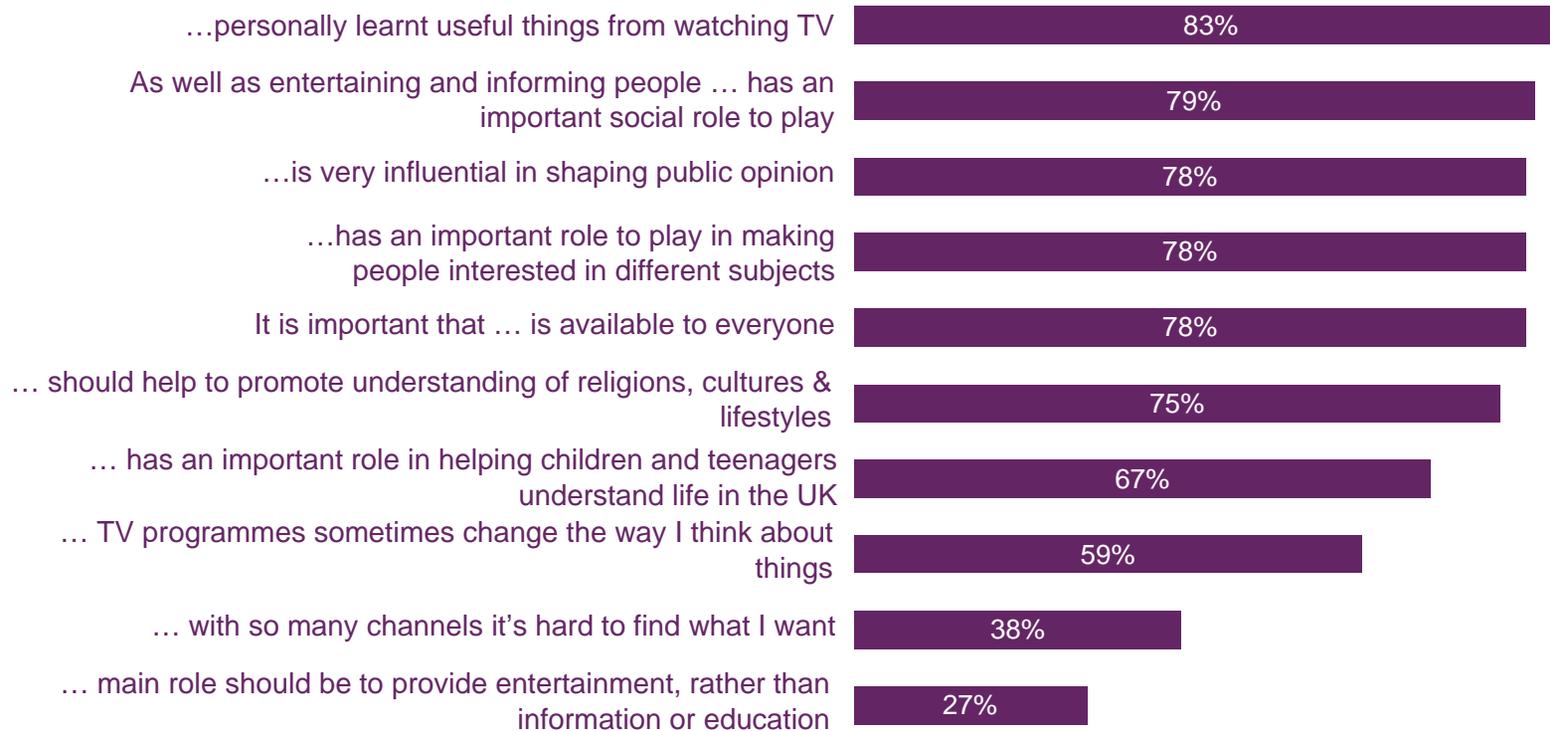
- **Entertainment**
 - Our 2007 deliberative research found that most people see TV as a means of relaxation and providing entertainment
 - 70% of people claimed their main reason for using TV was to relax, pass time or for fun (Media Literacy Audit, 2007)
 - Just over two thirds of respondents aged 16+ stated TV was their main source of entertainment (PSB Review survey)
 - But expectations of television go beyond pure entertainment
 - Less than one third (27%) of people thought that TV's main role was just for entertainment
- **Information and learning**
 - Over four in five (83%) agreed that they '*personally, have learned useful things from watching TV*' ((PSB Review survey)
 - Comparison of 2003 and 2007 results suggest there has been an increase in the proportion of people saying they have learnt things from the TV (66%, 2003)
 - However, for people with broadband at home, the internet has the edge over TV for learning, with 87% thinking they have '*personally learnt useful things from watching TV*' v 91% for the internet
 - This also applied to 16-24s with broadband (86% learnt useful things from TV v 94% from internet)
 - Participants in the deliberative study thought television could inform and educate across a range of programme genres from serious factual to soaps to light entertainment
 - PSB Tracker results show the primacy of Purpose 1 for people in terms of news provision

Four main roles of television (2)

- **Social role**
 - Ofcom’s deliberative study found that television plays a central role in people’s social lives – providing a talking point with colleagues and family, the opportunity to spend time together as a family and an easy way of socialising with friends
- **Social cohesion**
 - Participants in the deliberative workshops saw TV as a social leveller and an influencer of public opinion. Given perception that society is becoming more diverse and fragmented, TV was seen to be important in providing an understanding of UK culture and identity as a whole, as well as building understanding between communities/cultures about different values, behaviours, lifestyles and viewpoints.
 - Just under four fifths of people agreed ‘*As well as entertaining and informing people, TV has an important social role to play*’ (79%, rising to 87% among EMGs, PSB Review survey)
 - Just under four fifths of people agreed ‘*TV is very influential in shaping public opinions about political and other important issues*’ (78%, PSB Review survey)
 - Three quarters of people (75%) thought ‘*TV should help to promote understanding of religions, cultures and lifestyles*’
 - This rises to 82% among people from ethnic minority groups
 - Comparison of 2003 and 2007 results suggest there has been an increase in the proportion of people thinking this is important (61% PSB survey, 2003)

People recognise the educational, social and cultural roles TV plays

% Agree with TV statements (top 2 box)



Source: PSB Review survey Q14, 2,260 UK adults aged 16+, October - December 2007.

TV's educational, social and cultural roles supported by all audiences

-Ethnic minority groups more likely to appreciate TV's social role and ability to promote understanding of religions and lifestyles

-Older people more likely to think TV has an important role in making people interested in different subjects. A large minority, however, see TV's main role to be for entertainment

Q14 - % Agree with TV statements	ALL (2260)	16-24 (260)	25-34 (342)	35-44 (404)	45-54 (349)	55-64 (344)	65+ (541)	VRMR (1928)	Ethnic minority	ABC1 (1045)	C2DE (1167)
14d. I have personally learned useful things from watching TV	83	82	89	85	84	78	79	83	84	85	80
14a. As well as entertaining and informing people TV has an important social role to play	79	79	79	79	78	75	79	77	87	78	78
14g. It is important that TV is available to everyone	78	75	76	78	76	80	83	78	81	76	80
14e. TV is very influential in shaping public opinion about political and other important issues	78	71	79	81	82	76	80	78	83	81	76
14f. TV has an important role to play in making people interested in different subjects like arts, nature, science and history	78	68	81	76	82	80	84	79	77	80	78
14b. TV should help promote understanding and tolerance of different religions, cultures and lifestyles	75	73	79	79	77	73	75	75	82	79	73
14h. TV has an important role in helping children and teenagers understand life in the UK	67	68	67	71	69	65	65	66	73	68	66
14j. TV programmes sometimes change the way I think about things	59	62	62	63	68	55	47	58	64	61	57
14i. With so many channels now available, it's hard to find what I want	38	38	37	42	39	37	35	38	38	38	38
14c. TV's main role should be to provide entertainment rather than information or education	27	25	19	25	27	25	37	27	26	24	31

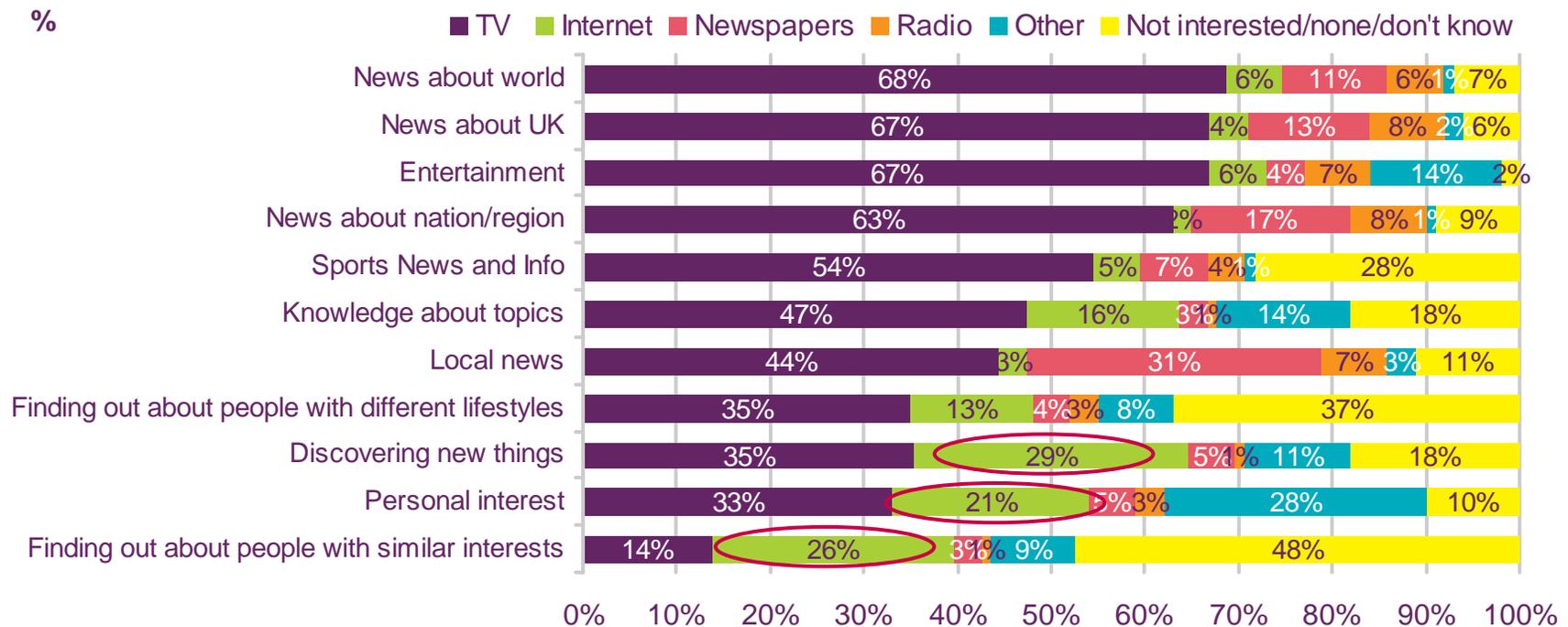
Source: PSB Review survey 2007 - Q14, 2,260 interviews with UK adults aged 16+, October - December 2007

TV is the main source for most media interests

- However, audiences are using the Internet for some interests, most notably personal interests and discovering new things. The Internet is most named source for finding out about people with similar interests

Note: See next section for views on TV on main channels and TV on digital channels

Which of these media would you say is your main source for ...?



PSB Review survey: Q12: 2,260 interviews 16+, October-December 2007, results for TV on main channels and TV on digital channels combined under TV

Compared to 2003, TV continues to be a main source for most media needs, most notably for all types of news and entertainment, but

The Internet has grown as a main source for personal interests and knowledge about topics
Which of these media would you say is your main source for...?

Which of these media would you say is your main source for...?

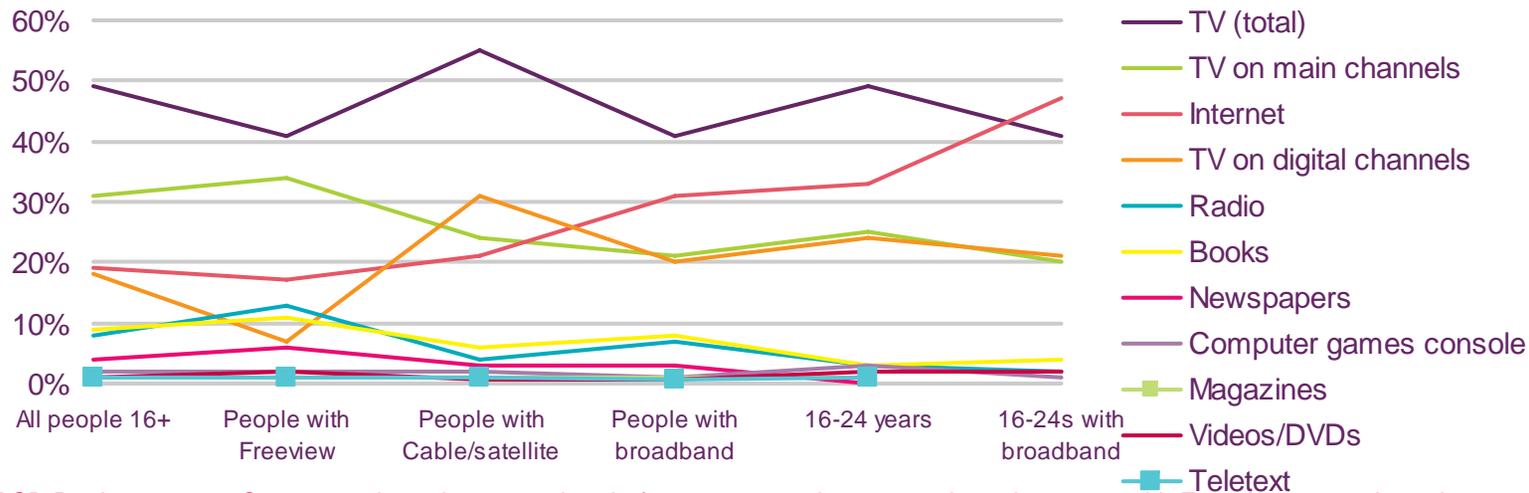
	TV**		Internet		Radio		Press		Magazines	
	2003*	2007	2003*	2007	2003*	2007	2003*	2007	2003*	2007
Entertainment	71	67	1	6	3	7	1	4	2	2
News about the UK*	{ 55 }	67	{ 1 }	4	{ 12 }	8	{ 22 }	13	{ 0 }	*
News about the world*	{ 55 }	68	{ 1 }	6	{ 12 }	6	{ 22 }	11	{ 0 }	*
News about your reg./nation*	{ 37 }	63	{ 1 }	2	{ 10 }	8	{ 36 }	17	{ 1 }	1
News about your local area*	{ 37 }	44	{ 1 }	3	{ 10 }	7	{ 36 }	31	{ 1 }	2
Your personal interest*	23	33	1	21	3	3	6	5	27	9
Knowledge about topics such as art, science, nature and history	58	47	3	16	2	1	2	3	3	3
Sports news and information	51	54	2	5	8	4	15	7	1	*
Finding out about people with similar interests to you	n/a	14	n/a	26	n/a	1	n/a	3	n/a	4
Finding out about people with different lifestyles to you	n/a	35	n/a	13	n/a	3	n/a	4	n/a	4
Discovering new things	n/a	35	n/a	29	n/a	1	n/a	5	n/a	4

•In 2003 the survey asked 'News about Britain and the World'. 'Information about my area/region', 'features about my personal interests and pastimes'

•** A combination of 'TV on main channels' and 'TV on digital channels', not directly comparable to 2003 which asked about TV overall

Source: PSB Review survey 2007: Q12: 2,260 interviews with UK adults aged 16+, October - December 2007, PSB survey 2003. Note 'Other' media not displayed here.

TV is the medium people would find it hardest to live without, except for 16-24s with broadband who would miss the internet



PSB Review survey: Q13: 2,260 interviews 16+, by platform access at home, 613 interviews 16+ with Freeview, 1,054 interviews 16+ broadband access, 1,186 interviews 16+ cable/satellite

- When evaluating these responses we need to bear in mind that the internet is a multifunctional platform (e.g. especially for younger people it is increasingly a source of audio visual material), whereas TV is not. With increased convergence these measures may become too blunt to assess media attitudes
- Concerning attitudes towards the internet, older people (9% of 55-64s and 3% of 65+) and people from C2DE groups (12%) are much less likely than the total population to miss the internet
- Older people are less likely to miss digital channels (13% of 55-64s and 8% of 65+) whereas people from C2DE groups (22%), are more likely than the UK population as a whole to miss them, as are people from EMGs (24%)

Among children 5-15 years based on those who use each medium regularly, TV is the medium they would miss most if taken away (46%), followed by computer games (16%) and the internet (13%). However, the importance of internet increases with age - among 12-15s the internet rises to 23% and TV drops to 28%. Source: Ofcom's Children's Media Tracker 2007

Main TV channels – usage

Continued attachment to the main TV channels

- Despite growing use of internet and digital channels, TV on the main channels is the medium one third of people would find it hardest to live without (see slide 73)
- However results vary by platform access and age:
 - Among people with cab/sat 'TV on the digital channels' scores higher (31%) than 'TV on the main channels' (24%)
 - Among people with broadband the internet scores higher (31%) than 'TV on the main TV channels' (21%) and 'TV on the digital channels' (20%)
 - One third of 16-24s would find it hardest to live without the internet, compared to one quarter for 'TV on the main channels' and one quarter for 'TV on the digital channels'. Among 16-24s with broadband, this rises to 46% would miss the Internet, outstripping both forms of TV
- Our deliberative study found that the main five channels remain key destinations for most people, for the following reasons:
 - Familiarity: strong sense of familiarity with these channels – many participants stated they grew up watching them, and they had become part of the fabric of their lives
 - Trust: This familiarity bred a certain amount of trust and an expectation of high standards
 - Serendipity: They were felt to show a variety of programmes and, furthermore, it was possible to 'stumble' across a programme which subsequently became of interest

Continued attachment to the main TV channels

- Among all people 16+, TV on the main TV channels was the most named source for a number of media needs:
 - Entertainment (42%)
 - UK news (53%), regions/nations news (56%), world news (49%) and local news (40%)
 - Knowledge about topics such as arts, science, nature and history (27%)
 - Sports info and news (30%)
 - Finding out about people with different lifestyles to you (22%)
- This pattern does not differ among people with Freeview

However, cab/sat is affecting viewing habits

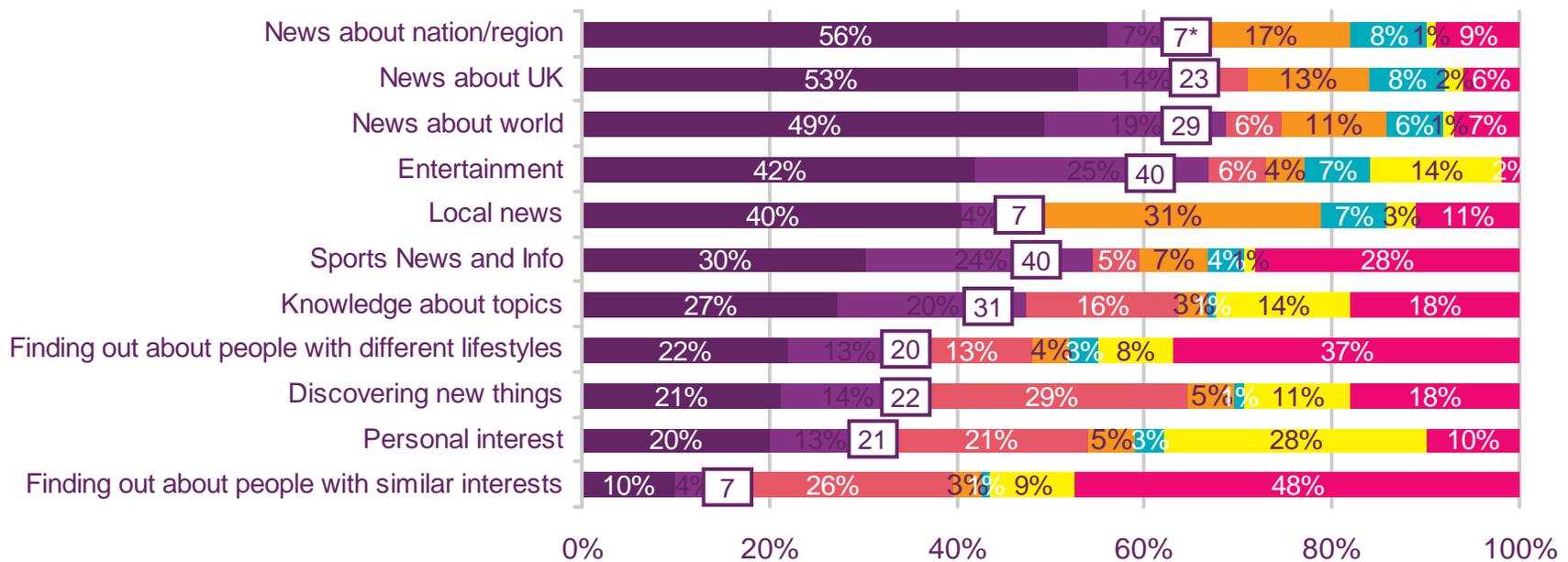
- Among people with cab/sat, although TV on the main channels remains the most named source for all types of news (UK, national/regional, world, local), there are significant differences vs. all people for sources of other media needs - digital channels score higher than TV on the main channels for:
 - Entertainment (40% name the digital channels v 30% naming the main TV channels as their main source)
 - Knowledge about topics such as arts etc (31% for digital channels v 19% for main channels)
 - Sports info and news (40% for digital channels v 20% for main channels)
 - Although cab/sat television is affecting people's media sources, there is clear evidence in both the deliberative study and the PSB Review survey study that people in cab/sat homes think provision of PSB on the main TV channels is important

TV on main channels is main source for most media interests

However, among people with cab/sat, digital channels are a main source for some genres (e.g. entertainment, sports, knowledge about topics)

Which of these media would you say is your main source for ...?

■ TV on the main channels ■ TV on the digital channels ■ Internet ■ Newspapers ■ Radio ■ Other ■ Not interested/none/don't know

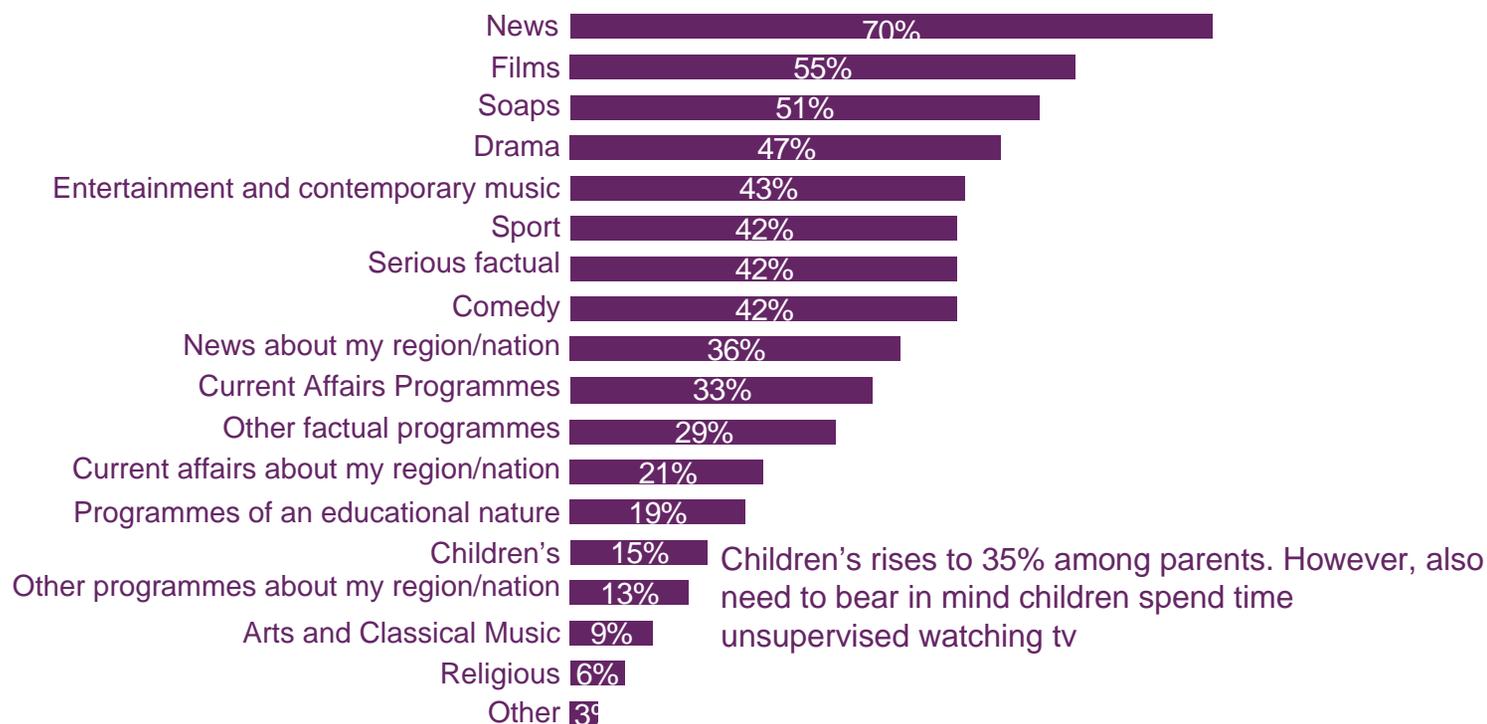


PSB Review survey: Q12: 2,260 interviews 16+

*Responses for TV on digital channels among people with cabsat shown in the boxes

News, films and soaps are the most popular programme types on the main channels

Q6. Which of the following types of programmes, if any, would you say you watch regularly on the main TV channels?



Source PSB Review survey Q6: 2,237 interviews UK adults aged 16+, October - December 2007. Note: This is claimed viewing

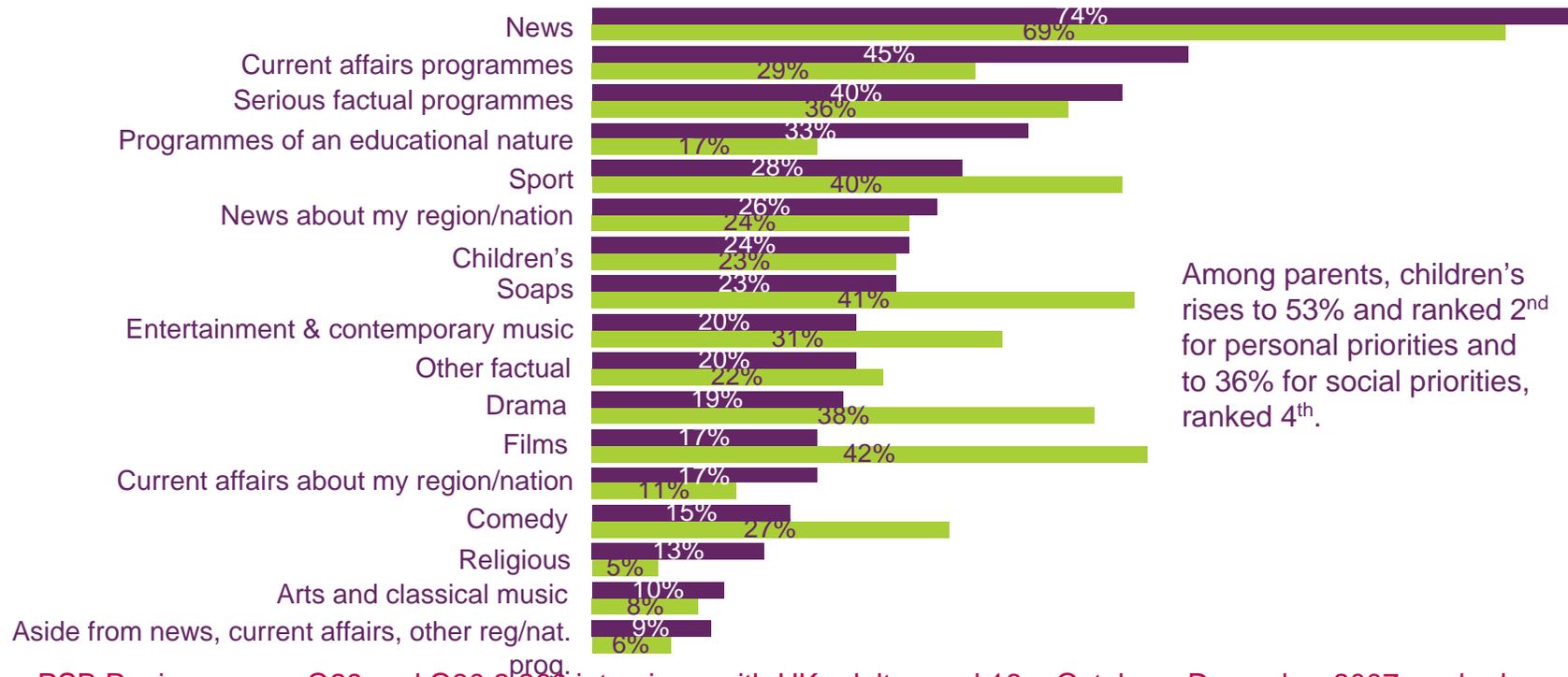
Main TV channels – personal and social priorities

Personal and social priorities on main TV channels

- There are differences in the programme genres that respondents perceive as personal priorities vs. social priorities
 - For example, films and soaps score highly in terms of claimed viewing and feature in the top five personal priorities but do not feature in the top five social priorities (PSB Review survey)
 - The one exception is UK network news which scores highly for claimed viewing and is the primary personal and social priority genre
- These differences in personal and social priorities are linked to the perceived role of television in society as both a source of entertainment and of learning (window on the world and consequently a means of binding society together)
 - The PSB Tracker results demonstrates that most PSB purposes and characteristics are highly valued by respondents, including younger people
 - Deliberative participants recognised that they may spend more time watching entertainment programmes compared to PSB type genres, but this did not reduce the perceived importance of these genres and the desire to ensure their continued provision
 - They highly valued PSB content and thought it was important for programmes with a social value to be entertaining in order to attract viewers
- Opinion on whether the main TV channels should cater for the majority or for different audiences was complex. On the one hand participants were concerned with their own viewing enjoyment and thought their needs were best catered for by majority programming. On the other hand, participants thought broadcasters had an obligation to cater for the needs of different audiences – given that everyone pays the licence fee there should be programmes tailored to the needs of all groups

Personal priorities for main TV channels different to social priorities, except for News and Serious Factual

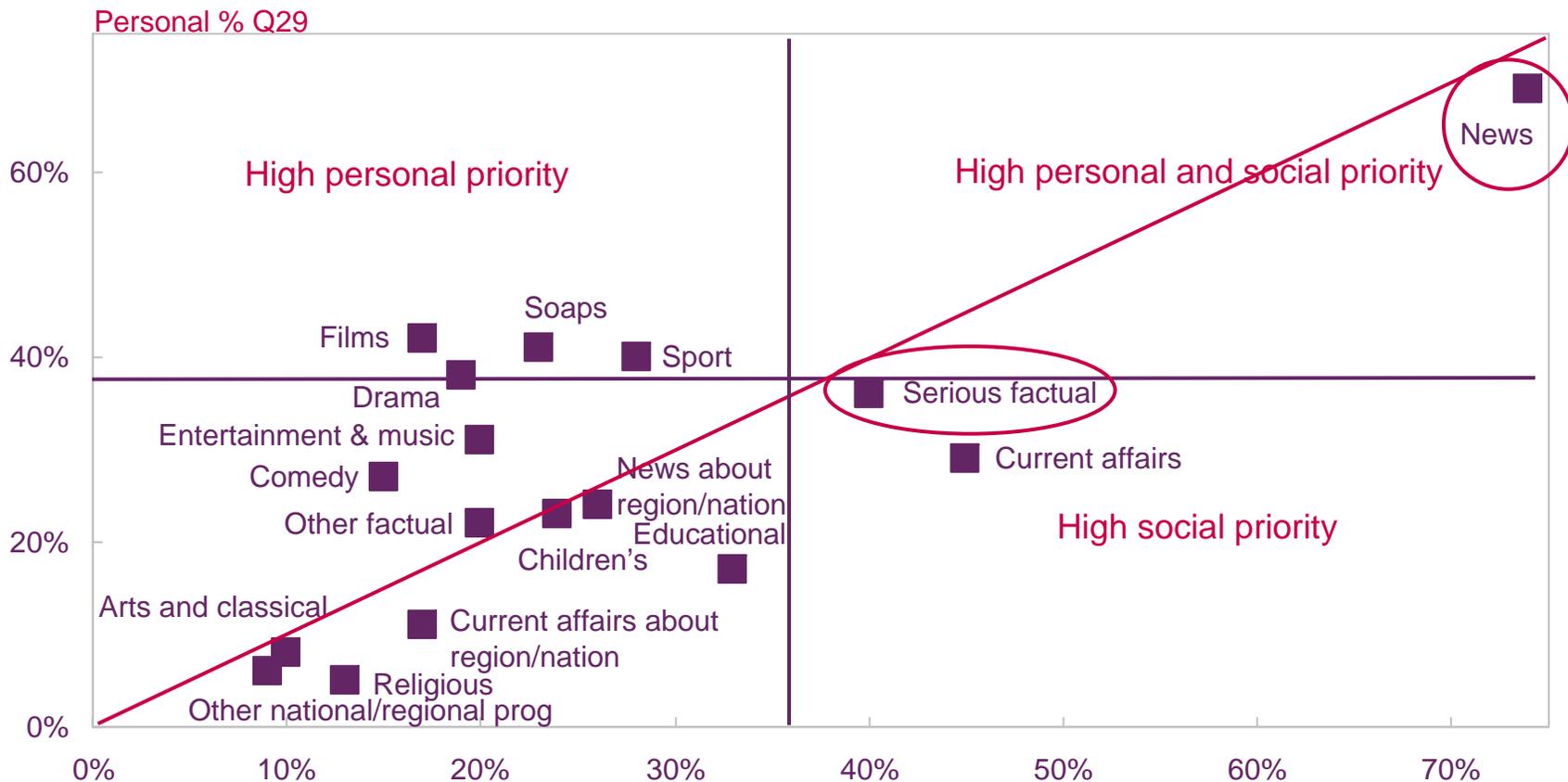
- Top 5 social priorities (Which five programme types you consider most important for the main channels to provide for the good of society as a whole?)
- Top 5 personal priorities (Which five programme types you consider most valuable to you)



Among parents, children's rises to 53% and ranked 2nd for personal priorities and to 36% for social priorities, ranked 4th.

Source PSB Review survey Q29 and Q30 2,260 interviews with UK adults aged 16+, October - December 2007, ranked on social priorities

Personal priorities compared to social priorities

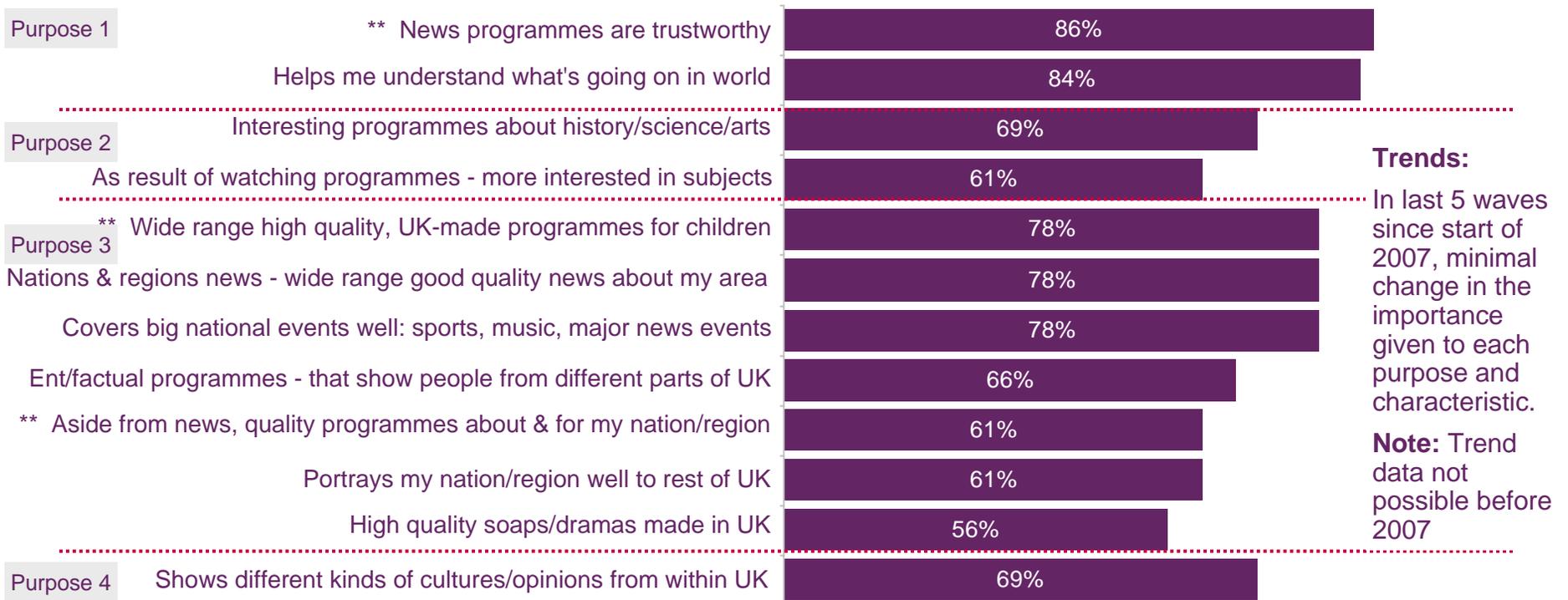


Source: PSB Review survey 2,260 interviews with UK adults aged 16+, October - December 2007

Main TV channels – importance of PSB purposes and characteristics

Purpose 1 statements are the most important for respondents, but all purposes valued by most

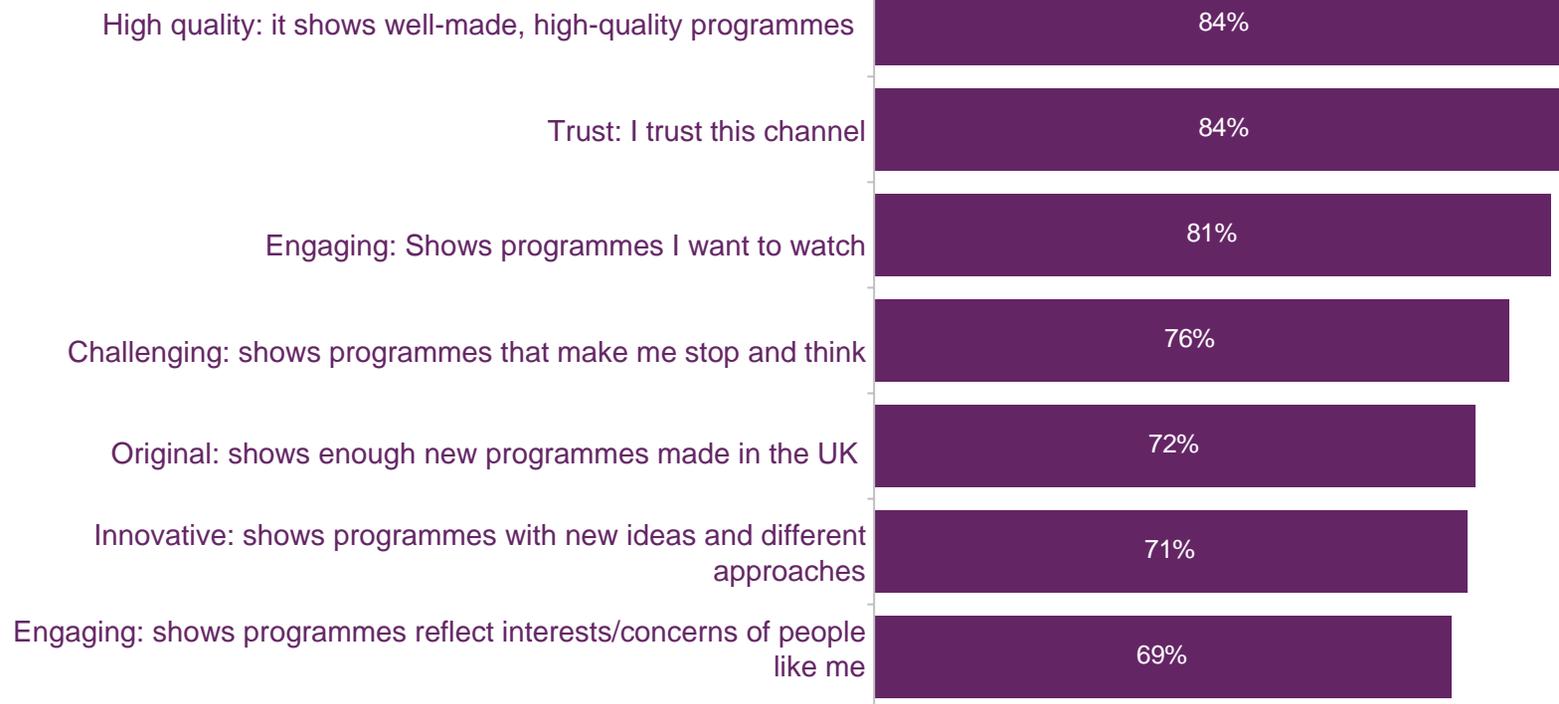
% of respondents who rate the importance of the statement as 7/8/9/10 out of 10



Source: PSB Tracker, 5,357 UK adults aged 16+. Amalgamated data January 07, April 07, July 07, October 07. Statements about children's programmes only asked of parents/carers of children in household. ** "Trust", "Children's" and "Aside from news..." only began to asked from July 07

PSB Characteristics of high quality, engaging content and trust rated as most important - and all characteristics deemed important by the majority

% rating 10/9/8/7 out of 10



Source PSB Tracker, 2007, UK adults aged 16+, Base = All respondents (5357). Amalgamated data: Jan 07, April 07, July 07, Oct 07. Statement about children's programming only asked of parents/carers of children in household

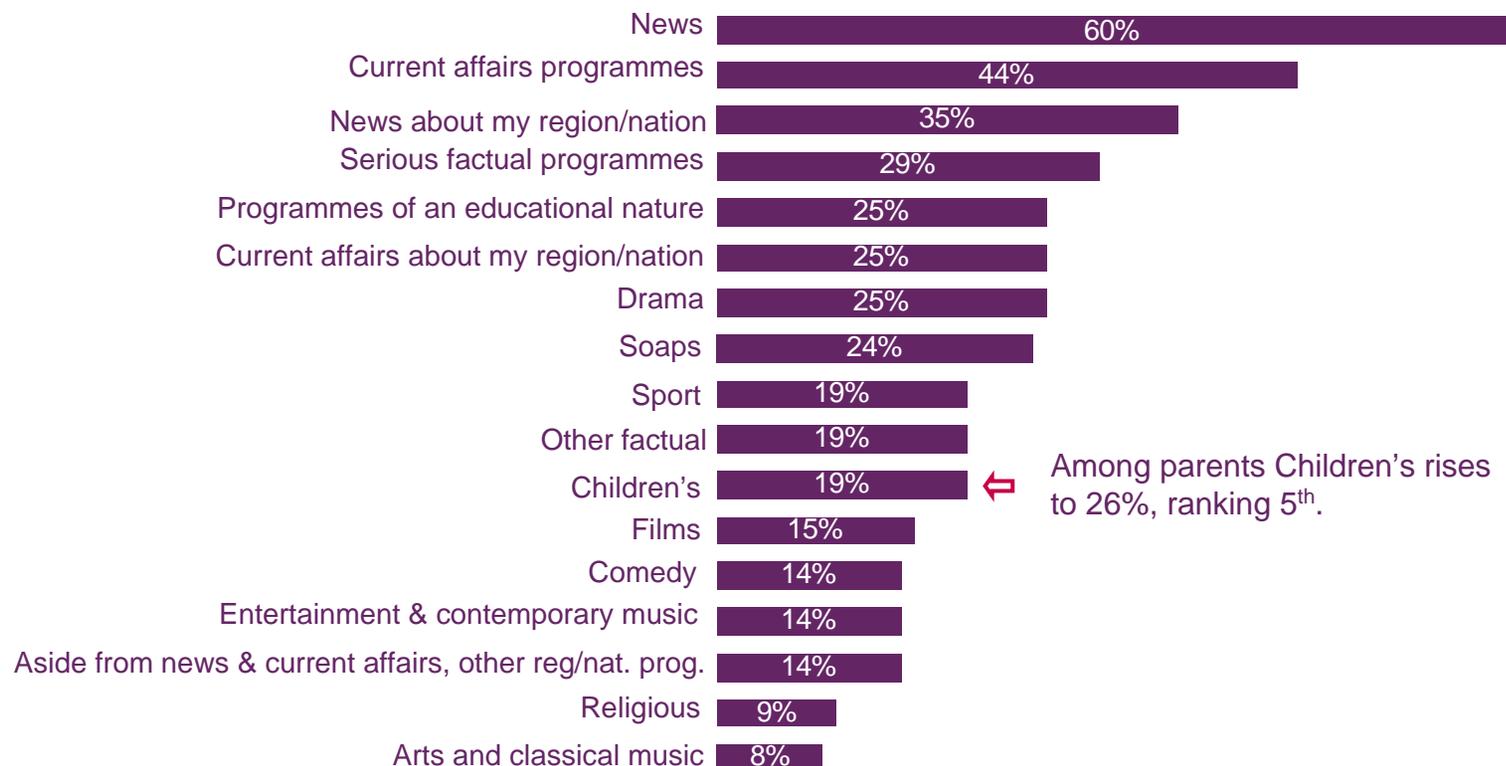
Main TV channels – importance of UK content

Programmes that reflect UK values and identities are believed to be important

- Primary concerns regarding PSB content are that the programmes are of a high quality, entertaining and informative – most deliberative participants felt that some acquired programmes and channels met these standards
- But the issue of UK origin was felt to be very important and a priority for the main TV channels
 - Just over four fifths (83%) stated *'it is important that the main TV channels provide programmes made in UK that reflect life in UK'*
 - In the deliberative work participants felt that programmes made in the UK were felt to better reflect life in the UK - without UK programmes, UK cultural identities may be lost (e.g. perceived 'Americanisation' of language by the young)
- Although support for imported programmes has risen since 2003, on balance the majority want UK-made and UK-focused programmes on the main TV channels (PSB Review survey)
- UK content was felt to be particularly important for certain programme types, with news/information/factual programming rising to the top (news, regional/national news, current affairs, serious factual and learning identified as top five genres for UK content)
 - Participants in the deliberative workshops also identified children's programmes (for educational reasons) and drama (resonance, identification, heritage) as priorities for UK content
- The onus for content to reflect UK identities was seen to fall on the BBC - over three quarters agree *it is important for the BBC to show a high proportion of programmes which reflect life in the UK* (77% compared to 65% for ITV1, 57% for Channel 4 and 48% for Five)
- Many participants still believed there is a place for high quality programming from overseas (naming programmes such as *CSI*, *Six Feet Under*, *The Sopranos* and *The Simpsons* as examples) which provide increased diversity and choice and different perspectives of the world

People want to see UK-made and UK-based news, current affairs and regional/national news

What are the five programme types you consider most important that they take place/are made in the UK?



Source PSB Review survey Q31: 2,260 interviews with UK adults aged 16+, October - December 2007

Although support for imported programmes has risen since 2003, on balance people want UK-made and UK-focused programmes on the main TV channels

For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see relating to the main TV channels

■ Agree with statement A ■ No preference/don't know ■ Agree with statement B



Responses to 'The best TV programmes from USA, Europe, Australia' rises to 25% among people with cab/sat and 31% among 16-24s. A comparison with 2003 results (16% agreed with statement A) indicates an increase over time, results for statement B are similar (58%), whereas no preference was 27%.

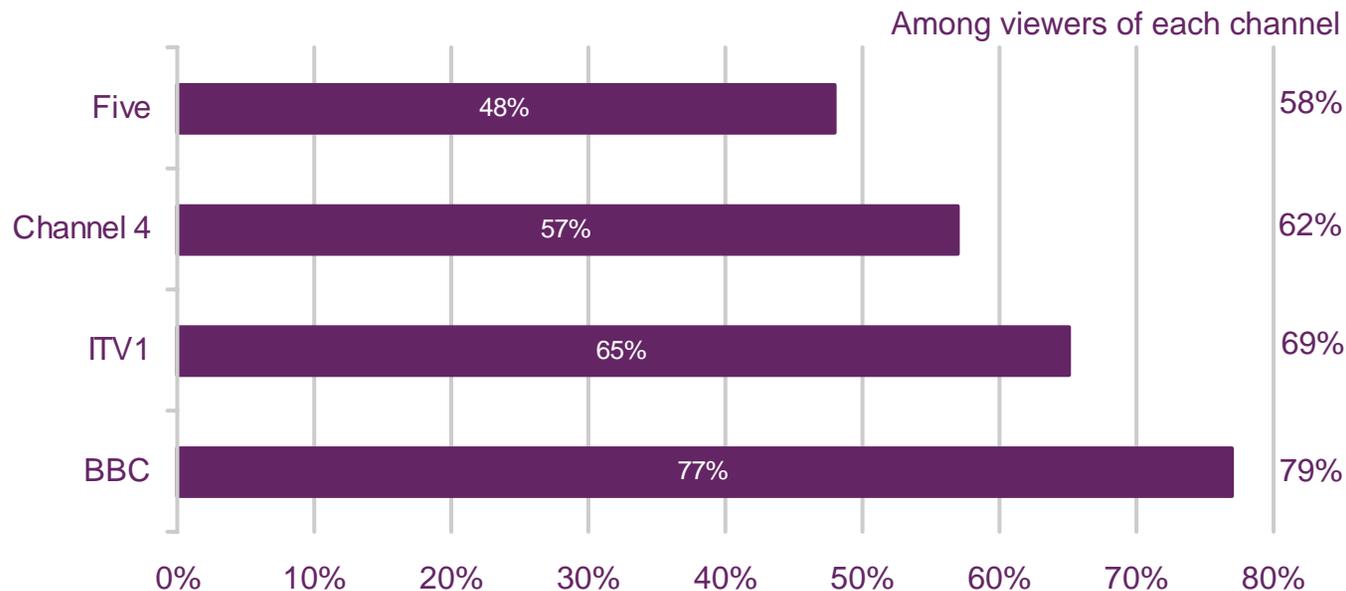


In the deliberative study, participants felt programmes about the UK as a whole would help bind the country together. However, they also felt that broadcasters had an obligation to cater for different audiences living in the UK. Comparison with 2003 results indicates an increase in support for 'programmes that reflect the needs and concerns of the UK as a whole' (55% agree with statement B, PSB Review survey 2003)

Source PSB Review survey Q18-22: 2,260 interviews with UK adults aged 16+, October - December 2007. Note: 2003 figures are listed above the 2007 data, caution when comparing data as question structure changed between the 2 waves

Highest expectations of UK content lie with BBC Expectations rise among viewers of each channel

'It is important for X channel to show a high proportion of programmes which reflect life in the UK' - % total agree with statement



Source: PSB Review survey Q23, 24, 25, 27 2,260 interviews with UK adults 16+, October-December 2007

Main TV channels –

importance of programme genres on the main channels as a whole

PSB genre provision on the main channels

- Provision of different programme genres on the main five channels is seen as key by all audiences
 - Certain types of programme are perceived as more vital to supply than others, with News (93%), National/regional news (88%), Current affairs (85%), garnering the highest scores, followed by programmes made in UK/reflect life in UK (83%) and national/regional current affairs (83%).
 - Provision of children's programming was deemed important by just over three quarters of adults (77%) and 85% of parents.
 - Religious programmes made in the UK, which has the lowest levels of support, is still wanted on the main channels by just under 50% of viewers

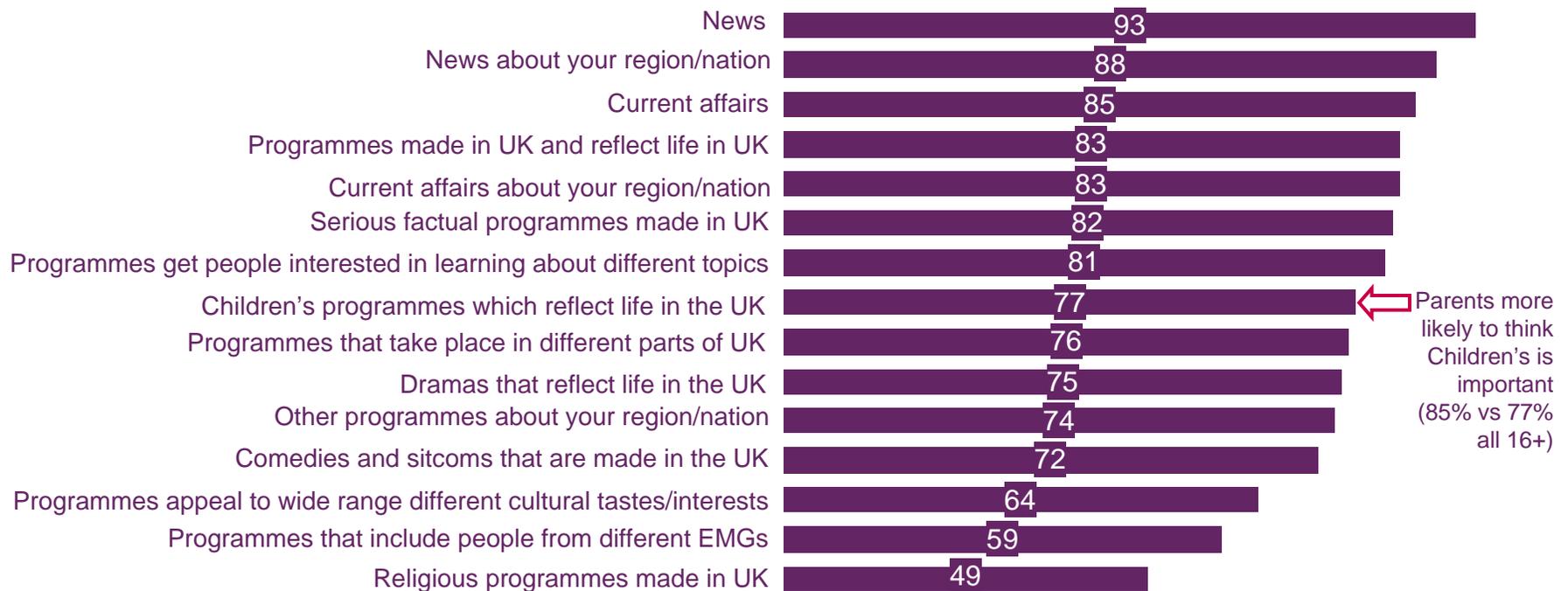
Differences by sub-group

- Overall, there was little difference in responses among cabsat viewers compared to all people
 - The only significant differences were for serious factual (79% among cabsat versus 82% among all people) and religious programmes (46% among cabsat and 49% among all 16+)
 - However, when asked if, in the future, some PSB genres could be provided on digital channels, cabsat viewers were generally more open to this than all 16+ - although a majority still thought it important for most genres to be provided on the main channels in the future (see Q43)
- People from ethnic minority groups (EMGs) were less likely to think it is important for the main channels to provide certain genres, although scores were still high - UK news (88% among EMGs v 93% of all 16+), national/regional news (80% v 88%), UK drama (67% v 75%) and UK comedies (65% v 72%), whereas there were higher levels of agreement v all 16+ for programmes that appeal to different cultural tastes (71% among EMGs v 64% of all 16+) and programmes that include different EMGs (72% v 59%) and religious programmes made in the UK (58% v 49%)
- There were a few differences by socio economic group, the most notable differences being for current affairs (90% of ABC1s v 81% for C2DEs think it is important) and comedies made in UK (69% of ABC1s v 76% of C2DEs)
- Younger people were somewhat less likely to think provision of news (89% of 16-24s v 93% of 16+), current affairs (76% v 85%), national/regional current affairs (73% v 83%) and serious factual (76% v 82%) is important, but scores are still high. They were more likely to think UK comedies were important (82% of 16-24s v 72% of 16+) and programmes which include people from different EMGs (67% of 16-24s v 59% of 16+)

News, regions/nations news, and current affairs are seen as most important to provide on the main channels as a whole

All genres supported by a majority

'How important is it that XX programme genre is shown on the main TV channels?' - % agree quite important/very important



Source: PSB Review survey Q33, 2,260 UK adults aged 16+, October - December 2007.

Importance of programme genres on the main channels - by subgroup

How important is it that is shown on the main TV channels?

Q33. % Important to be shown on main channels as a whole	All (2260)	16-24 (260)	25-34 (342)	35-44 (404)	45-54 (349)	55-64 (344)	65+ (541)	ABC 1 (1045)	C2D E (1167)	Main Channels (439)	Free-view (613)	Cab/Sat (1,186)	EMG (318)
News	93	89	90	92	95	97	96	94	93	94	95	93	88
News about your region/nation	88	85	84	89	90	90	91	87	89	86	91	88	80
Current affairs	85	76	83	86	89	88	89	90	81	86	89	84	82
UK made programmes that reflect life here	83	83	85	82	83	80	88	85	83	82	85	84	81
Current affairs about your region/nation	83	73	80	85	85	88	88	84	82	81	87	82	77
Programmes that get people int. in dif topic	81	83	82	82	77	85	81	83	81	77	86	82	79
Serious factual	82	76	77	80	84	88	86	84	80	83	87	79	77
Children's programmes that reflect life in UK	77	75	81	83	79	68	74	79	75	76	76	78	76
Programmes that take place in dif part of UK	76	74	75	76	74	76	79	75	77	76	78	76	77
Dramas that reflect life in the UK	75	77	71	73	79	80	76	76	75	73	79	75	67
Other programmes about your region/nat	74	71	75	72	72	75	81	72	77	76	78	73	70
Comedies and sitcoms made in the UK	72	82	69	69	72	74	69	69	76	68	77	71	65
Prog appealing to wide range of diff. cultural tastes	64	64	60	69	65	63	64	69	60	63	66	64	71
Prog. that incl. dif. ethnic minority groups	59	67	59	62	61	55	52	65	53	61	61	57	72
Religious programmes made in the UK	49	44	43	48	45	50	59	52	45	54	50	46	58

Source PSB Review survey Q33: 2,260 interviews with UK adults aged 16+, October - December 2007. Negative sig differences in red and positive in green versus all people

Main TV channels – plurality by programme genre

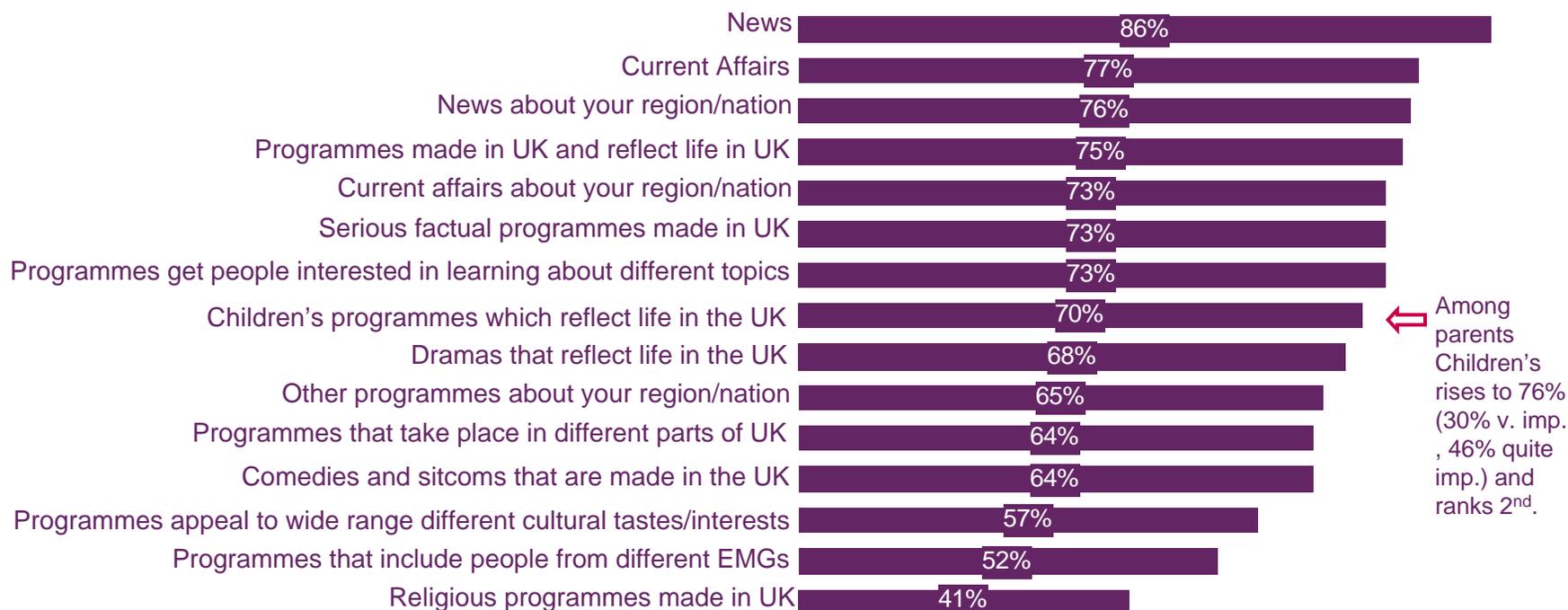
Audiences value plurality in PSB provision

- Plurality on the main channels was a key concept for participants in the deliberative study
- Underpinning this was belief people should have **choice** in which broadcaster they turn to and the channels had different roles, catered for different audiences, had different styles and offered different viewpoints
- Plurality was also believed to stimulate competition between the broadcasters, that could lead to **higher quality** programming
- Importance of plurality was closely linked to importance attached to programme type. The more important it was perceived to be, the more important an issue plurality became
- **BBC:** Seen as a flagship broadcaster and its longevity has resulted in higher levels of trust (though some participants in the deliberative workshops referred to diminished trust related to phone-in scandals). BBC's role in PSB was not only seen to be more important than the other main channels, its role was vital
- **ITV1:** Seen as popular. Its contribution to UK network and regional/national news provision in particular important
- **Channel 4:** Regarded as the alternative voice to the BBC with an output which was considered to be more 'edgy' and which engages with young people
 - This is supported in the quant survey where 64% (v 46% in 2003) agreed Channel 4 took '*a different approach on subjects to other channels*' and 62% (v 51% in 2003) thought it was '*more noticeably risk taking and innovative*'.
 - For both these statements a comparison with the 2003 survey indicates an increase in agreement with these statements
- **Five:** While the quality of its output was questioned by many, it was perceived to present issues in a friendly and accessible manner, which some participants found easier to understand
- Plurality was considered important by the majority for most, if not all, genres, whereas some genres were seen to be more important than others
 - While nearly nine in ten believed *it is important that the news is shown on more than one of the main TV channels* (86%), three quarters felt this should be the case for current affairs, national/regional news, serious factual, programmes which get people interested in learning, and regional/national current affairs (77%, 76% , 73%, 73% and 73%), seven in ten for children's and drama (70% and 68%). The importance of Children's rises among parents with 76% thinking plural supply is important
 - Programmes catering for different or specific interests tended to gain lower levels of support, with just under three in five (57%) thinking plurality on the main channels was important for '*programmes which cater for a wide range of cultural tastes and interests*' and two in five for Religious programming made in the UK (41%)
- Analysis by subgroup shows that the majority of cabsat viewers think that most programme types should be shown on more than one of the main channels – there are no significant differences versus all people

Plural supply of news, regions/nations news, and current affairs are seen as most important

Most if not all genres seen to be important by a majority

How important is it that XX programme type is shown on more than 1 channel? % agree (very/quite important)



The result for importance of plural provision of national/regional news rises significantly in Northern Ireland to 86%, as it does for current affairs about my nation/region (82%) and for non-new national/regional programmes it rises in each of the devolved nations (73% in Scotland, 71% in Wales, and 78% in Northern Ireland)

Source: PSB Review survey, Q34, 2,260 UK adults aged 16+, October - December 2007

Which groups feel particular PSB genres should be shown on more than one of the main channels?



Q34. % Important to be shown on more than one of main TV channels	All (2260)	16-24 (260)	25-34 (342)	35-44 (404)	45-54 (349)	55-64 (344)	65+ (541)	ABC1 (1045)	C2DE (1167)	Main Channels (439)	Free-view (613)	Cab/Sat (1,186)	EMG (318)
News	86	80	80	87	91	87	91	87	85	85	89	86	82
Current affairs	77	65	73	78	84	77	83	81	73	78	79	76	76
News about your region/nation	76	67	72	78	81	77	83	75	78	76	79	76	67
UK made programmes that reflect life here	75	71	75	75	76	75	80	75	75	75	76	76	72
Programmes that get people int. in dif topic	73	73	73	73	73	75	74	75	72	71	77	74	74
Serious factual	73	65	68	69	80	79	77	74	72	73	76	72	71
Current affairs about your region/nation	73	64	68	73	75	75	81	72	74	76	75	71	69
Children's programmes that reflect life in UK	70	69	74	73	74	62	68	70	70	69	69	71	69
Dramas that reflect life in the UK	68	66	64	63	73	73	71	68	68	64	72	68	61
Other programmes about your region/nat	65	58	62	63	65	68	71	61	68	69	64	64	62
Programmes that take place in dif part of UK	64	64	62	64	63	66	69	63	67	65	68	64	69
Comedies and sitcoms made in the UK	64	71	63	60	66	68	62	61	69	60	68	65	60
Prog that appeal to a wide range of diff. cultural tastes	57	58	55	58	62	54	57	60	54	56	60	56	56
Prog. that incl. dif. ethnic minority groups	52	58	54	53	56	46	46	57	47	52	53	52	64
Religious programmes made in the UK	41	39	35	35	39	45	53	44	39	50	43	37	49

Source PSB Review survey Q34: 2,260 interviews with UK adults aged 16+, October - December 2007. Negative sig differences in red and positive in green versus all people ©Ofcom

Programme genres and plural supply: quant findings

- There are high levels of support for plurality of provision of **news** on the main TV channels, with 87% of people thinking that each of the channels should provide at least one news programme between 6pm-10.30pm (PSB Review survey, Q37a). There was no difference in view among people with cable/satellite.
- With regard to **regional/national news**, over four fifths (84%) thought '*the main TV channels are an important source of information about regional/national news*'. This rises significantly to above 90% in each of the devolved nations. (PSB Review survey)
- Plurality of provision of regional/national news by the BBC and ITV1 is seen to be important by over four fifths of people, with 83% of people thinking '*it is important that both ITV1 and BBC provide regional/national news.*' (PSB Review survey, Q39b). This rises significantly in each of the devolved nations to over 90%.
- There is strong support for plurality of provision of **children's** programming, with three quarters (75%) of people thinking that TV channels other than the BBC should provide children's programmes, and this rises to 80% among parents. (PSB Review survey, Q42a)

Programme genres and plural supply: qual findings

Programme genre	Importance of PSB plurality	Reasons why
UK network news	'Crucial'	<ul style="list-style-type: none"> • Provides different perspectives • Accountability • Ensures impartiality
Regional/national news	'Crucial'	<ul style="list-style-type: none"> • Different perspectives • Accountability • Impartiality • In devolved nations, and outside London, regional/national news significant issue tied to national, cultural identity, democratic debate and choice
Current affairs	'Crucial'	<ul style="list-style-type: none"> • Different perspectives and viewpoints • Of increasing importance, given society changing at such a fast pace
Serious factual (arts, history, nature, science)	'High'	<ul style="list-style-type: none"> • Provides different perspectives and viewpoints
Children's	'High'	<ul style="list-style-type: none"> • Deemed important by parents and non-parents • To cater for different tastes, interests and ages
UK drama	'High'	<ul style="list-style-type: none"> • To cater for different audience tastes • Broadcasters had different perceived strengths (e.g. BBC – period adaptations, Channel 4 – topical issues, ITV1 – psychological thrillers)
UK comedy	'High'	<ul style="list-style-type: none"> • Cater for different audience tastes and broadcasters had different perceived strengths (e.g. Channel 4 – alternative, ITV1 – family audience)
Schools/educational	Medium	<ul style="list-style-type: none"> • Maintenance of plural supply was supported by most participants to provide choice for schools and cater for different educational needs
Religious programmes	'Low'	<ul style="list-style-type: none"> • Few participants watched this content which was described as programmes about formal worship • Those with strong religious views stated representation on main channels at all outweighed perceived need for plurality and could get alternative views by engaging with religious community • For some, however, plurality was important, especially in relation to providing different perspectives on Islam

Is there enough PSB on the main channels?

Public satisfaction with the amount of PSB on the main channels was assessed by programme type and respondents were asked whether they felt the amount was adequate.

Results show that for all of the programme genres, a majority of the public feel there is enough of this content on the main channels. In each case over half of the public say there should be the same amount on the main channels. This rises to almost eight in ten for news programming (79%) and three quarters for current affairs (75%).

A significant minority thought there should be more of some of the PSB genres, serious factual made in the UK (30%), UK comedies (24%) and programmes that get people interested in different topics (28%) were all more likely to be cited as genres that there could be more of on the main channels.

Just under one fifth thought there should be more regional/national news, UK-made programmes and Children's programmes that reflect life in the UK.

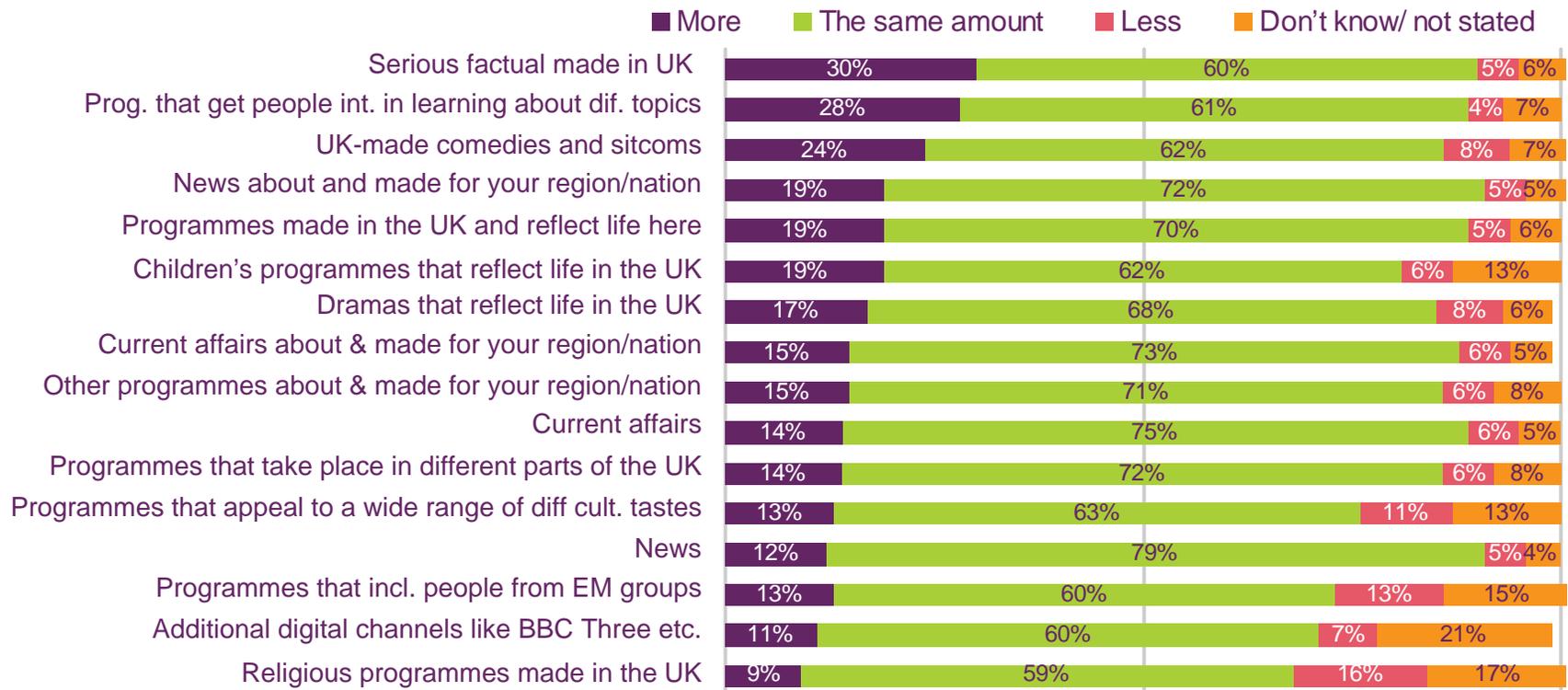
Responses to the other programme genres were broadly consistent with between ten and twenty percent of the public saying they would like more of content for the twelve other PSB genres. For only one genre – religious programming made in the UK – were there greater numbers of the public in favour of less rather than more content on the main channels. 16% would like less compared to 9% would like more.

There were no significant differences among people in cable satellite homes, which demonstrates that access to a wide range of digital channels has not reduced the need for provision on the main channels.

Half of parents (52%) would like to see the same amount of children's programmes, whereas a significantly higher proportion of parents (24%) compared to all 16+ (19%) would like to see more. However, this also applies to those who want less (8% of parents vs 6% of all 16+).

Some viewers would like to see more serious factual, UK comedies and programmes that get people interested in different topics

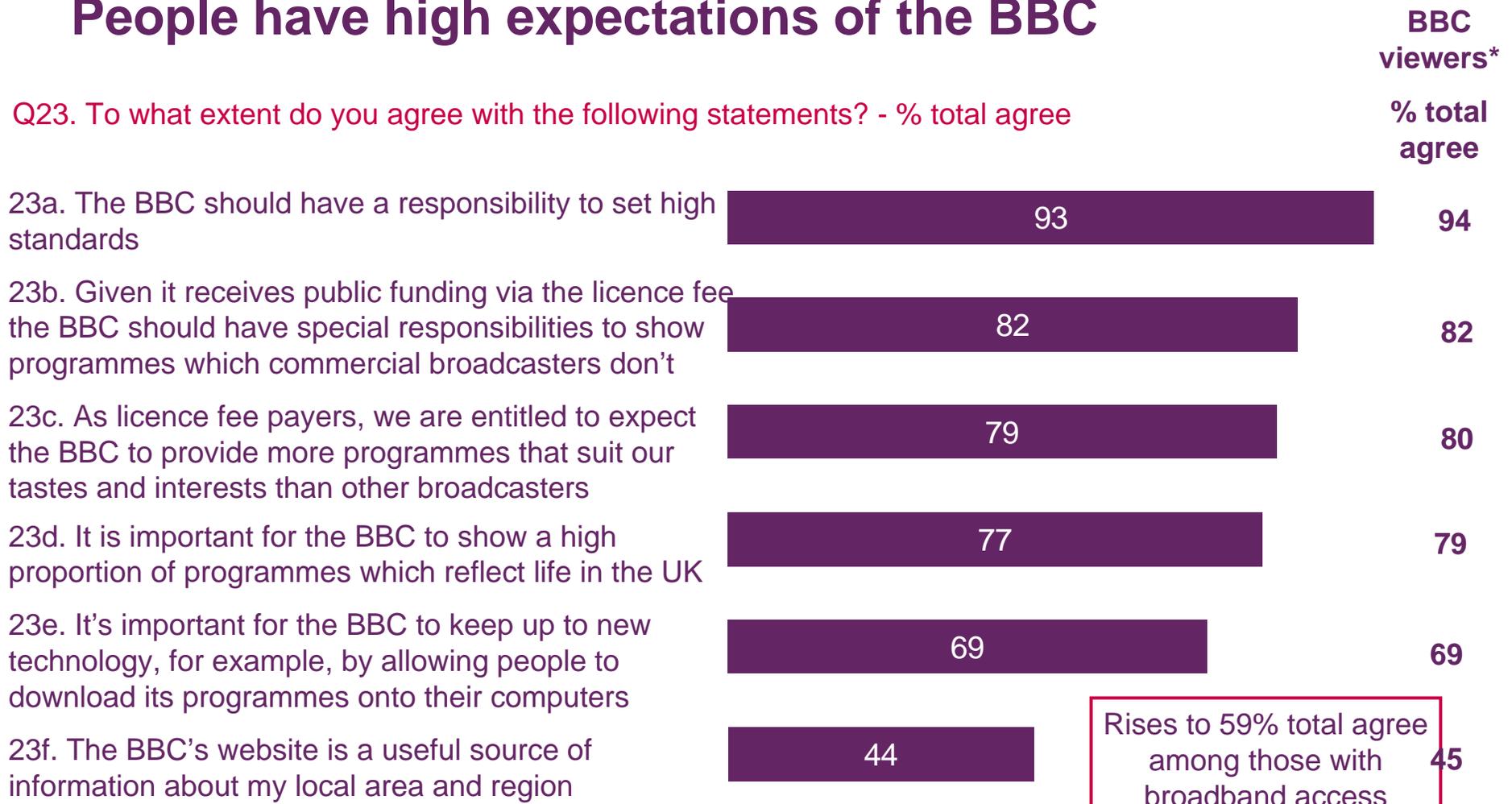
Q35. Should there be more/less or the same amount of this content on the main TV channels?



Source PSB Review survey Q35: 2,260 interviews with UK adults aged 16+, October - December 2007

Main TV channels – attitudes towards each channel

People have high expectations of the BBC



Source Q23: 2,260 interviews with UK adults aged 16+, October - December 2007

People expect a wide range of programming from ITV1 - but some inconsistency regarding freedom and content provision

ITV1 viewers*

% total agree

Q24. To what extent do you agree with the following statements? - % total agree

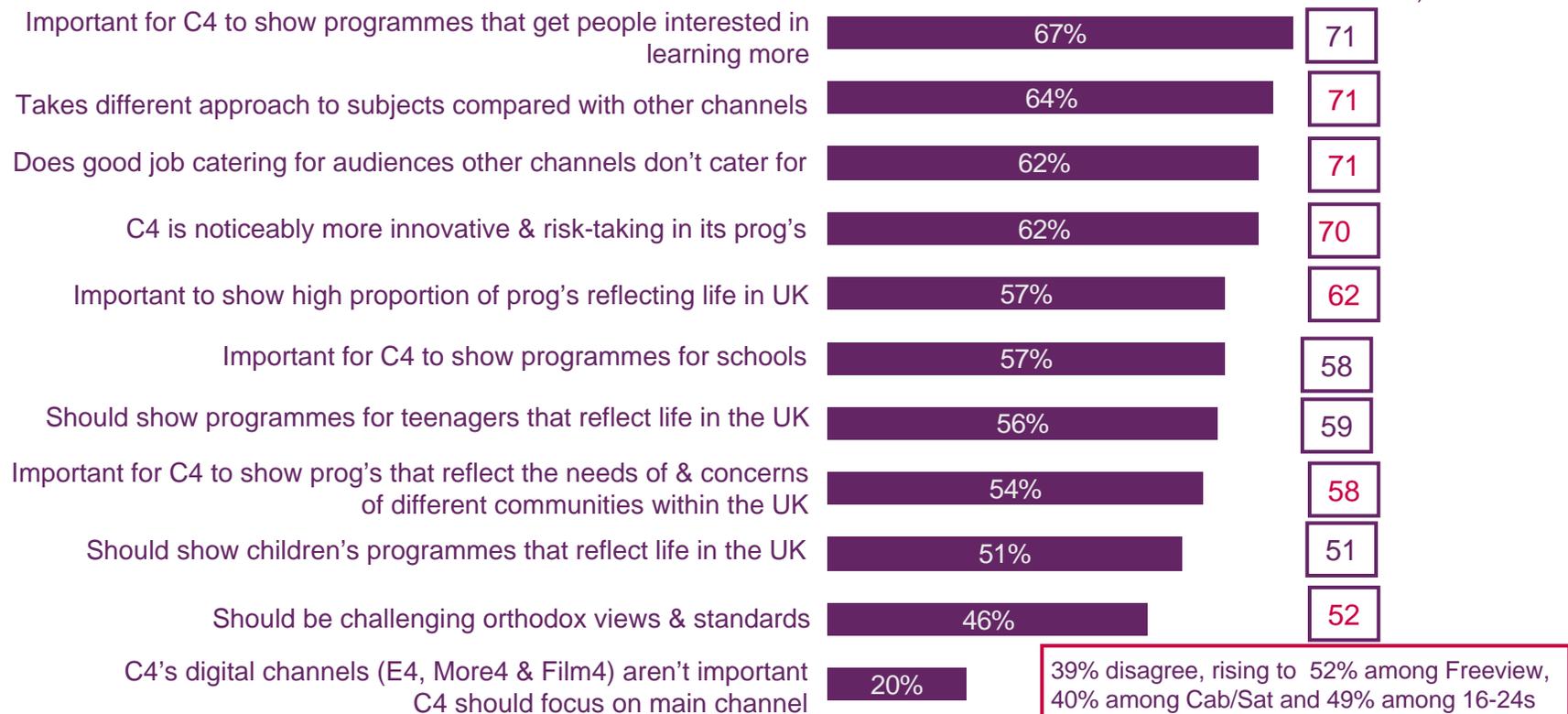
24g. It is important for ITV1 to show programmes that are made in a variety of different parts in the UK	70	73
24b. It is important for ITV1 to show a range of programmes about my region/nation aside from news and current affairs	69	71
24d. ITV1 should show children's programmes that reflect life in the UK*	68	71
24f. It is important for ITV1 to show a high proportion of programmes that reflect life in the UK	65	69
24e. ITV1 should show more serious documentaries and current affairs at peak times (between 6 –10.30pm)	57	58
24c. ITV1 should be free to do whatever feels it needs to do so that it can continue to attract a large audience	54	58
24a. ITV1 should concentrate on pop. ent. programmes, drama and soaps, rather than try to do everything	42	47
24h. ITV1's website is a useful source of information about my local area and region	22	26% with broadband access 24

Source Q24: 2,260 interviews with UK adults aged 16+, October - December 2007. *ITV viewers (1,682)

Perceptions that Channel 4 fills a niche are higher among viewers

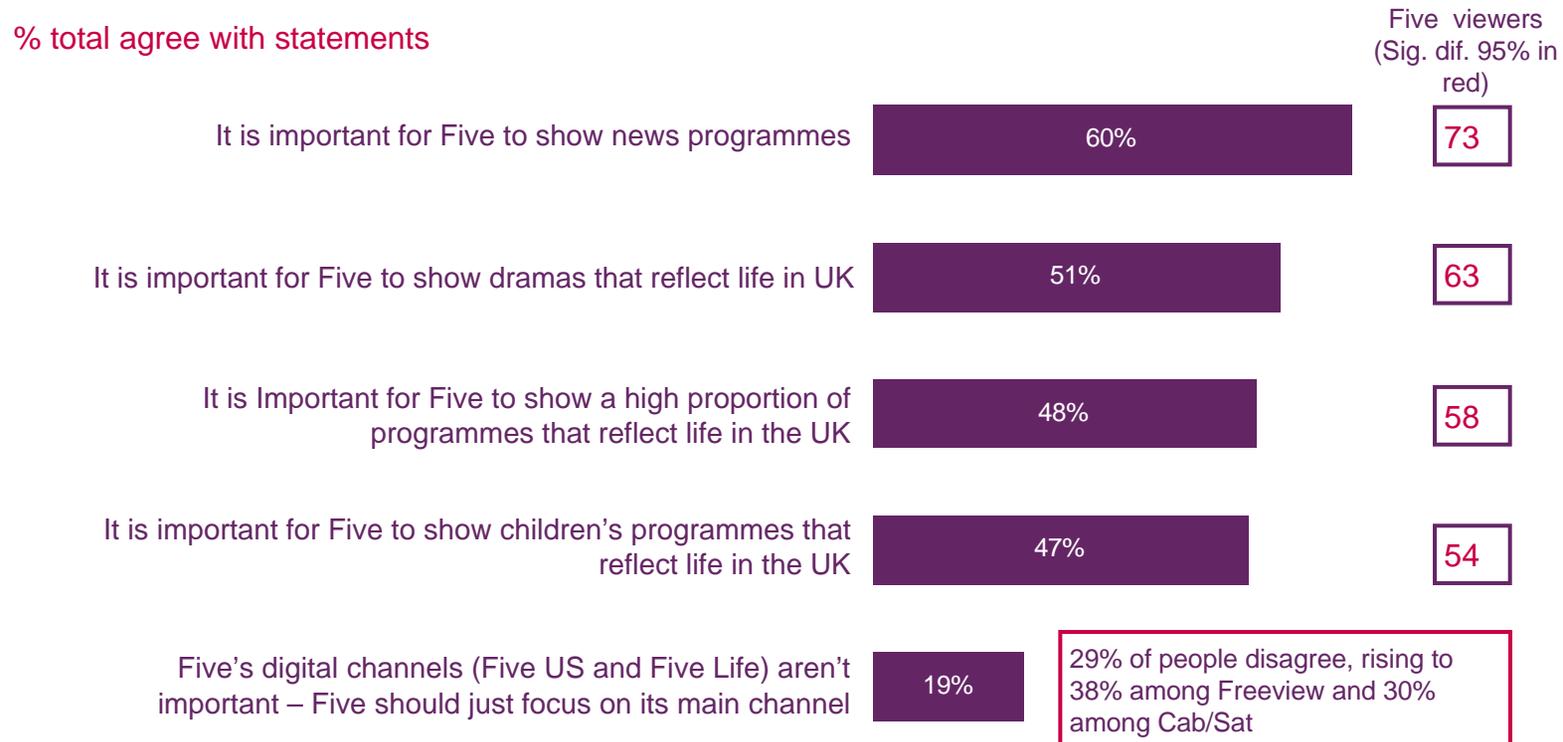
% total agree with statements

C4 viewers (sig. dif. 95% in red)



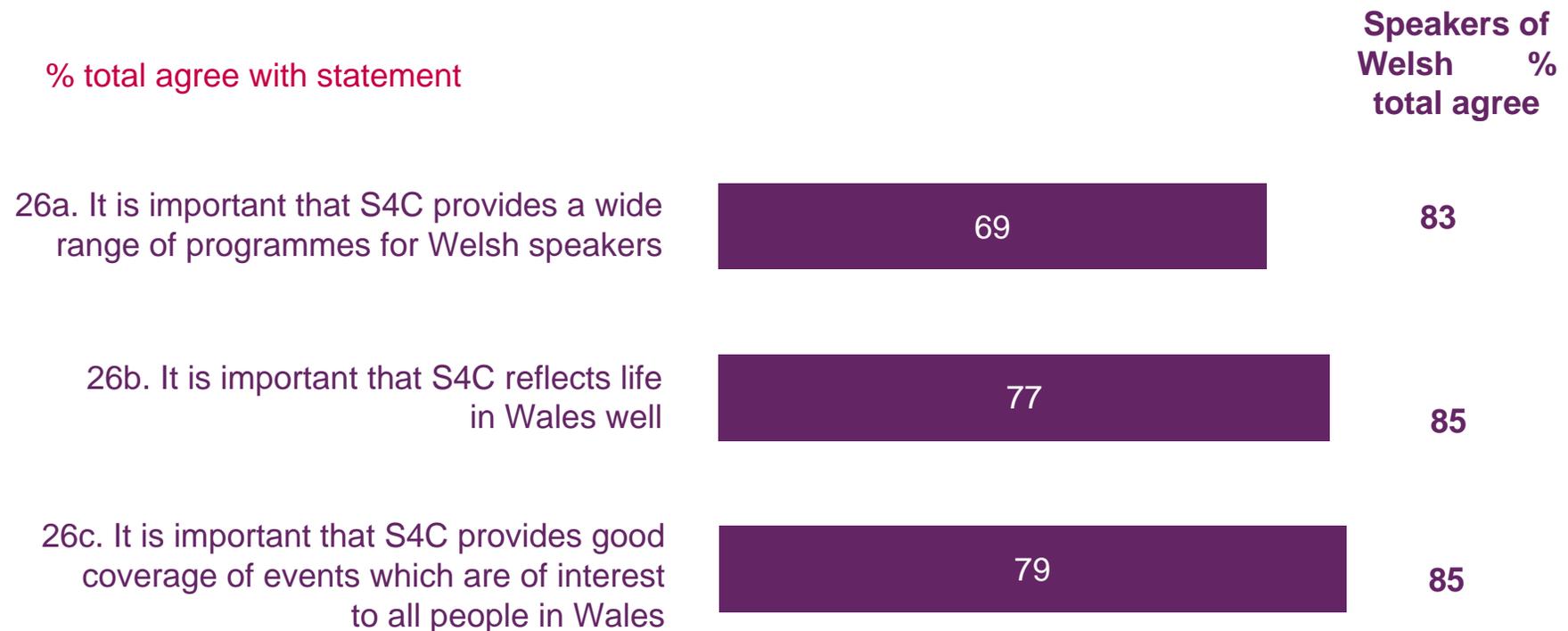
Source PSB Review survey Q25: 2,260 interviews with UK adults aged 16+, October - December 2007

60% feel that Five should continue to show news – rising to nearly ¾ of its regular viewers



Source PSB Review survey Q27: 2,260 interviews with UK adults aged 16+, October - December 2007

Importance of S4C in Wales



Source Q26: 395 people in Wales aged 16+, October - December 2007, 110 Welsh speakers

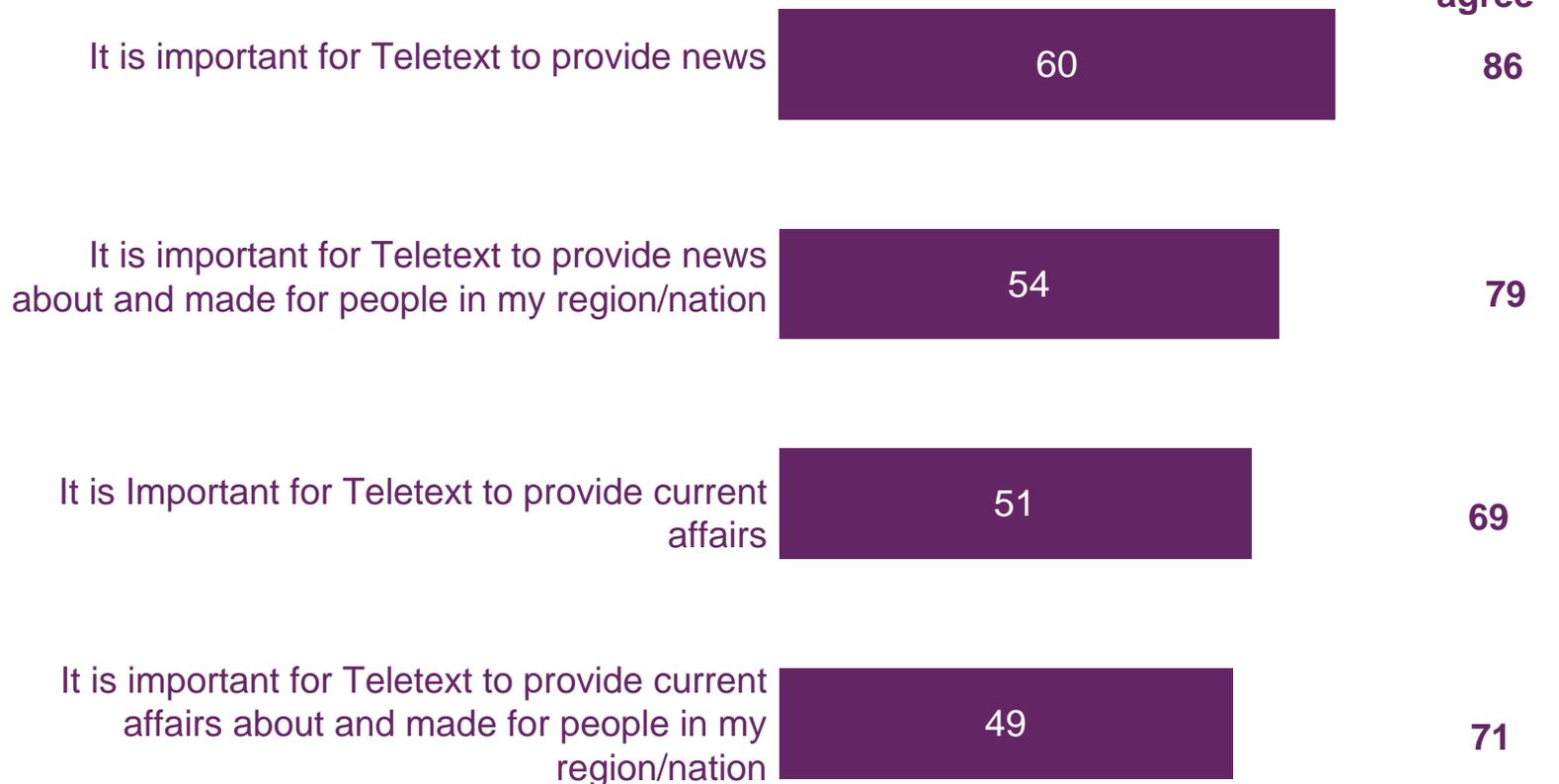
Around half or more feel that Teletext should be providing news and current affairs and national/regional news and current affairs



Teletext users*

% total agree

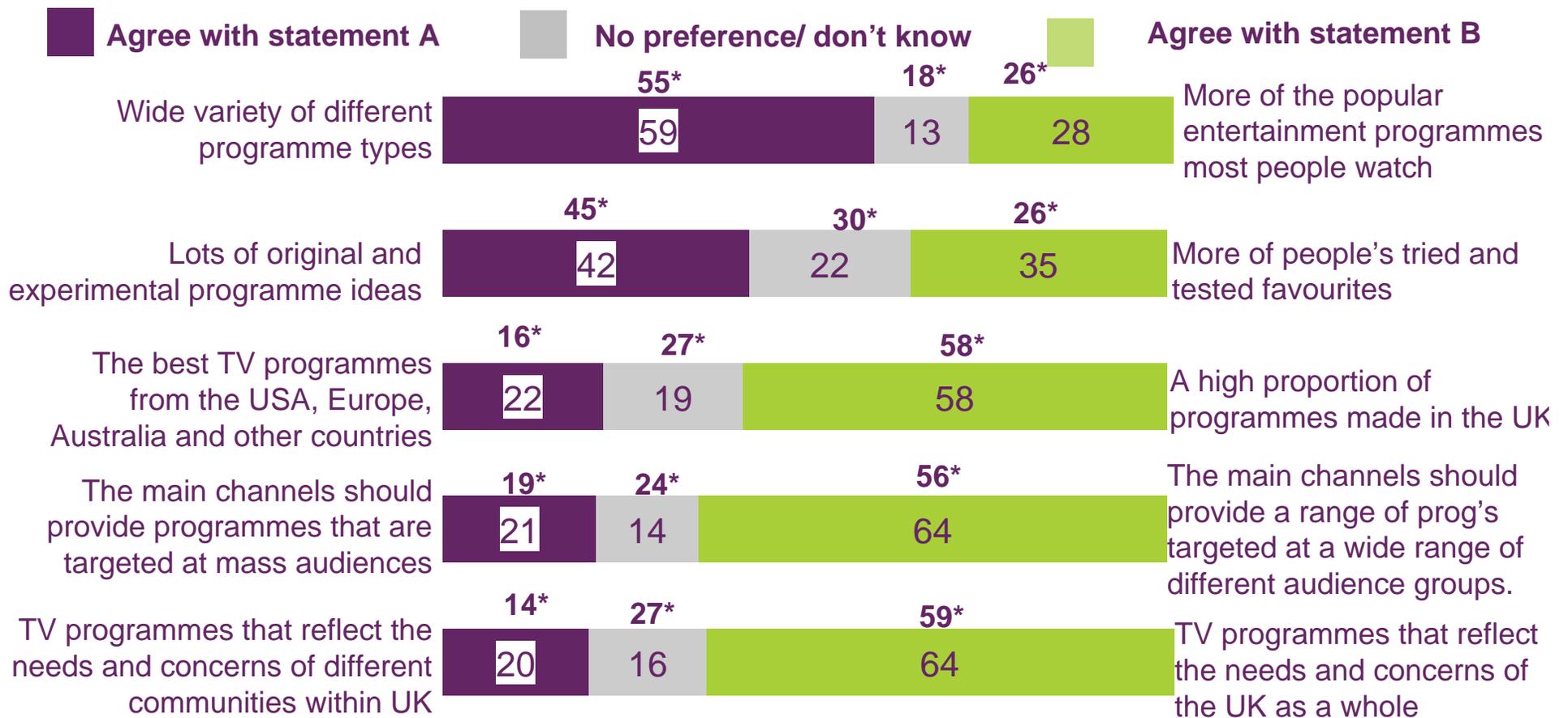
% total agree with statement



Source 28: 2,260 interviews with UK adults aged 16+, October - December 2007. *Teletext users (344)

On balance people want UK made & UK focused programmes

For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see relating to the main TV channels



Source Q18-22: 2,260 interviews with UK adults aged 16+, October - December 2007

Note: 2003 figures are listed above the 2007 data, caution when comparing data as question structure changed between the 2 waves

Satisfaction with television

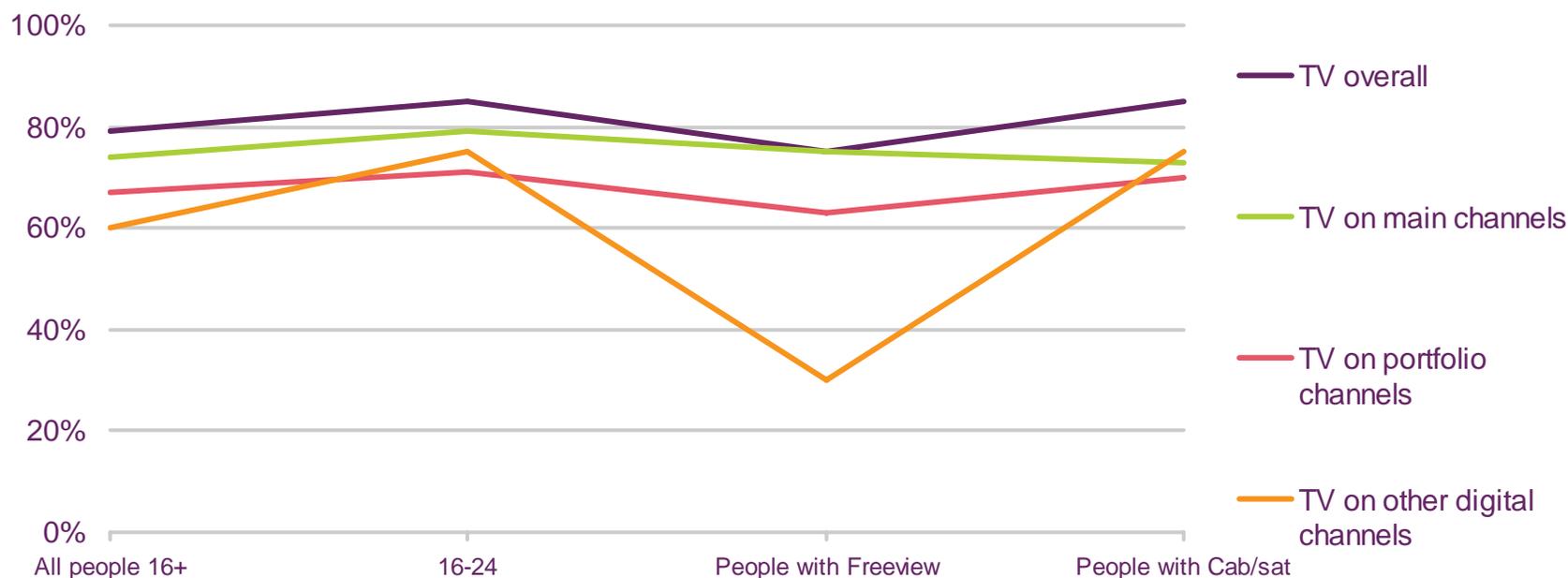
Satisfaction with television

- There are high levels of satisfaction with TV overall (79% of respondents satisfied)
 - Satisfaction decreases with age, and is significantly higher among 16-24 years (85%)
- There are high levels of satisfaction with the main five channels:
 - Three quarters of respondents are satisfied (74%)
 - Slightly more 16-24s are satisfied with the main TV channels (79%) compared to all people (74%) and satisfaction also decreases with age.
 - EMGs are less likely to be satisfied with the main five channels (although 69% still say they are)
- Levels of satisfaction with different TV platforms differ between audiences:
 - Among people with multichannel there is huge variation in satisfaction with the portfolio channels and other digital channels:
 - 70% of people with cabsat are satisfied with portfolio channels compared to 63% among people with Freeview
 - 75% of people with cabsat satisfied with the 'other digital channels' compared to only 30% among people with Freeview *
 - People from different EMGs are more likely to be satisfied with 'other digital channels' as are people aged 16-24, 25-34 and 35-44s with multichannel

* *This lower response from people with Freeview may be an outcome of the question wording, which listed subscription channels among the examples – there is therefore a high level of don't know responses (44%) among people with Freeview*

Satisfaction with television varies by age and TV platform

How satisfied are you with ...? (% very/fairly satisfied)

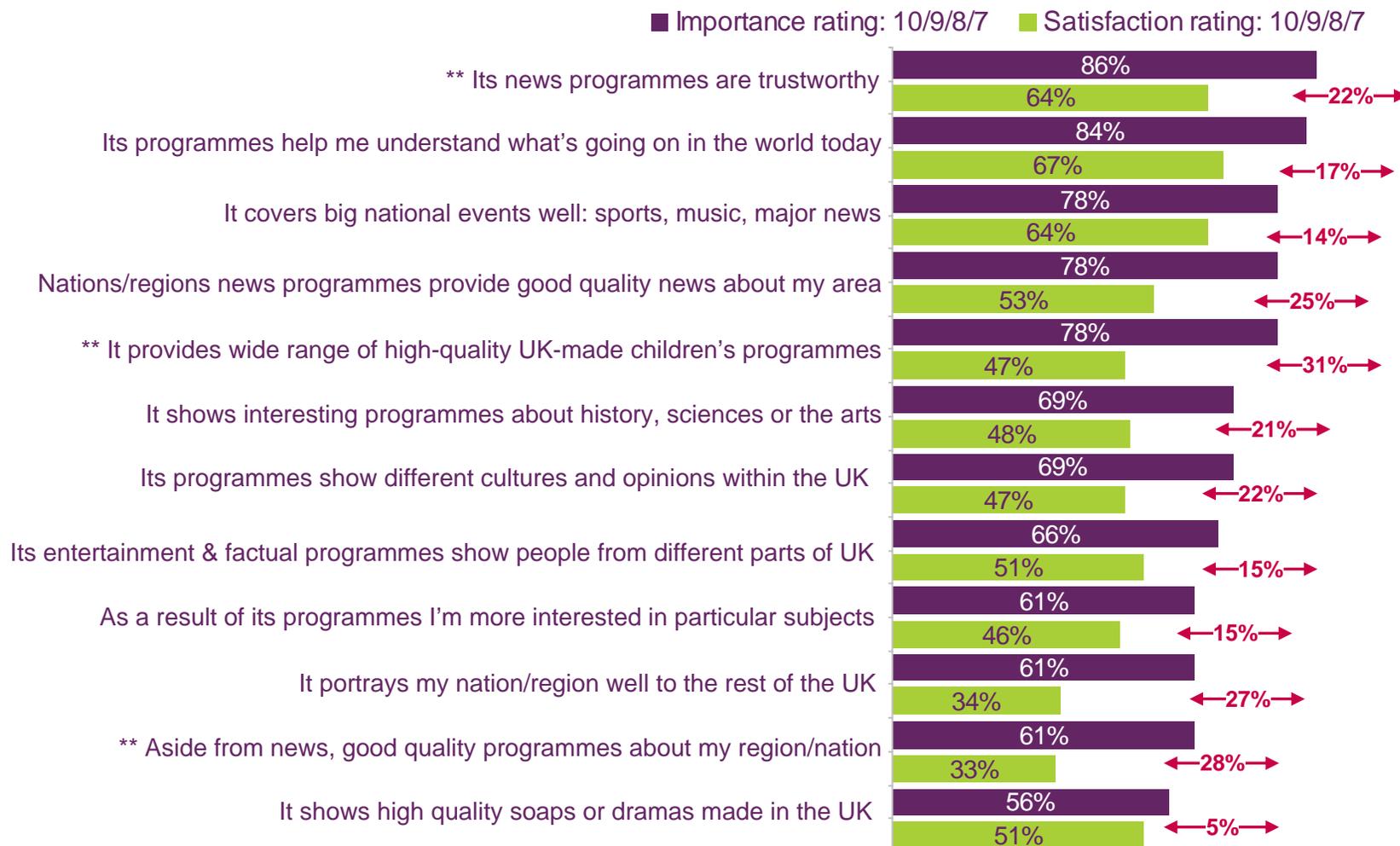


Source: PSB Review survey Q44: 2,260 interviews with UK adults aged 16+, note portfolio channels and other digital channels asked of people with multichannel only, 1,799 interviews; October-December 2007

PSB “gaps” : importance versus satisfaction

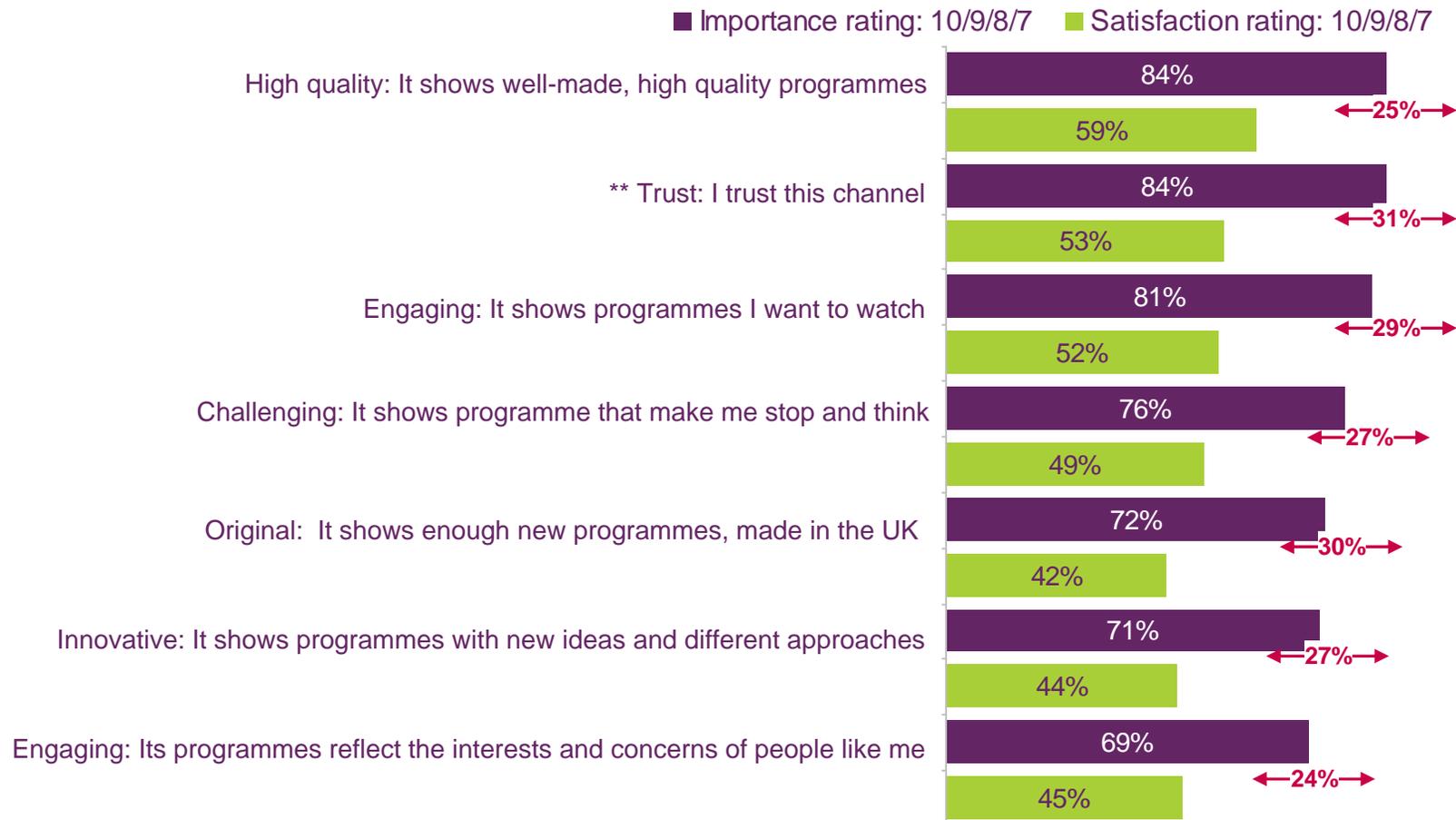
- While levels of perceived importance are nearly always higher than levels of perceived satisfaction, due to the theoretical/hypothetical nature of the former and the actual nature of the latter, nonetheless the relative gaps between the importance and satisfaction ratings of various elements of PSB are useful to note, as measured on the 2007 PSB Tracker quantitative survey. It is the *relative* size of the satisfaction gaps for the different elements of PSB purposes and characteristics that is most interesting, rather than the absolute figures.
- Focusing on those PSB purposes and characteristics that are rated by over 70% of people as being important, the biggest gaps between importance and satisfaction with delivery when considering the PSB channels as a whole are:
 - **Wide range of high quality and UK-made children’s content** (78% v 47% - a gap of 31 percentage points (pp) [based on parent/carer responses])
 - **Trust** (84% importance v 53% satisfaction – a gap of 31 pp)
 - **Enough new UK programmes** (72% v 42% - a gap of 30 pp)
 - **Innovative** programmes – with new ideas and different approaches (71% v 44% - a gap of 27 pp)
 - **Engaging content** – programmes people want to watch (81% v 52% - a gap of 29 pp)
 - **Regional/national news** (78% importance v 53% satisfaction – a gap of 25 pp)
- In other words, some key areas of dissatisfaction appear to be related to the amount of UK, original (in both senses of the word) content, for adults and for children. The issue of trust is perhaps a factor of the fieldwork for this question taking place in the latter half of 2007 after various high-profile stories relating to this issue
- While overall, levels of importance relating to other elements nations and regions provision are not as high as for the elements of PSB above, there are significant gaps between importance and delivery of non-news programmes, and with network portrayal - Northern Ireland and Scotland show gaps of 46% and 40% respectively in terms of **portrayal of the nation to the rest of the UK** (Wales gap is 29% and England 25%)
- These former factors around content also emerged in the first PSB Review, along with issues of scheduling and range of programming

PSB Purposes: Importance vs satisfaction



Source: PSB Tracker. Amalgamated data January 07, April 07, July 07, October 07. 5,357 UK adults aged 16+ for importance responses; 7,157 UK adults aged 16+ for satisfaction ratings. Statements about children's programmes only asked of parents/carers of children in household. ** "Trust", "Children's" and "Aside from news..." only began to be asked from July 07.

PSB Characteristics: Importance vs satisfaction



Source: PSB Tracker. Amalgamated data January 07, April 07, July 07, October 07. 5,357 UK adults aged 16+ for importance responses; 7,157 UK adults aged 16+ for satisfaction ratings. Statements about children's programmes only asked of parents/carers of children in household.

** "Trust", "Children's" and "Aside from news..." only began to be asked from July 07.

PSB importance and satisfaction – sub-groups

By age

- Younger people, aged 16-24, were less likely than older people to rate some PSB elements as important, specifically “showing interesting programmes about history, science and arts”, “showing new UK originations”, “having trustworthy news” and “showing programmes that help people understand what is going on in the world”. That said, the majority still agreed that each of PSB purposes and characteristics were important, with trustworthy news and engaging content being highest in importance. There were some differences among older people, compared to younger age groups; most notably, the importance of purpose 2 statement “showing interesting programmes about history, science or arts”, and the purpose 3 statements “portraying my region well to the rest of the UK” and “providing a range of good quality programmes about my region/nation” where each of these increased in importance with age.
- Levels of satisfaction among 16-24s are slightly higher for many of the purposes and characteristics compared to all 16+ and levels of importance slightly lower, but the overall “gaps” between the two are for similar elements compared to all 16+, e.g. – trust (20% gap); engaging content (17% gap) and regional news quality (21%)

By socio economic group

- There were some differences by socio-economic group. People from DE groups were more likely to think that non-news regional programmes were important compared to people from AB groups, as well as portrayal of their region/nation to the rest of the UK, and the provision of UK-made dramas and soaps and making the viewer more interested in subjects. For most other elements ABs tended to rate the statements the same or higher than DEs, that said, a majority of people from DE groups thought each element was important
- There are many differences in levels of satisfaction by purpose: for most purposes, except Purpose 1 statements, and ‘showing interesting programmes about arts, science etc’ ABs are more likely than DEs to score these lower. Regarding Characteristics, except for showing programmes with new ideas and different approaches, ABs are more likely to score these lower.

Ethnic minority groups (EMGs)

- The majority of people from ethnic minority groups thought that each of the purposes and characteristics statements was important. That said, people from ethnic minority groups are less likely than the UK overall to rate many elements of PSB as important - in particular trust in channel (73% v 85%) and trustworthiness of news (80% v 87%)
- They are more likely to rate reflecting different kinds of cultures within the UK (80% v 69%); reflecting interests and concerns of people like me as important (76% v 69%); and indicatively more likely to rate children’s programmes as important
- Levels of satisfaction are generally similar to the UK overall figures, except for some Purpose 1 elements – they are less likely to be satisfied for ‘trustworthiness of news’ (57% v 65%); ‘help understanding of the world’ (60% v 68%); as well as Purpose 3 coverage of big national events (58% v 65%) and regional/national news (47% v 54%)
- Among EMGs the biggest gaps between importance and satisfaction are for reflecting different kinds of cultures (80% v 48% - 32pp gap) and reflecting interests and concerns of people like me (76% v 46% - 30pp gap), regional news (77% v 47% - 30pp gap), UK children’s programmes (83% v 50% - 33pp gap), other regional programmes (63% v 30% = 33pp gap), programmes that make me stop and think (78% v 47% = 31pp gap)
- In terms of TV provision as a whole, EMGs are less likely to be satisfied with the main five channels (although 69% still say they are) and more likely to be satisfied with digital commercial channels (76%).

Also see *Young People slides*

Purposes: importance vs satisfaction – by subgroup

Statement		All 16+	16-24	25-34	35-44	45-54	55-64	65+	AB	C1C2	DE	White	Not White
Its news programmes are trustworthy	Importance	86	80	88	88	89	86	85	92	87	82	87	80
	Satisfaction	64	68	62	64	65	62	64	65	64	63	65	57
	Gap	22	12	26	24	24	24	21	27	23	19	22	23
Its programmes help me understand what's going on in the world today	Importance	84	76	85	86	87	85	85	89	84	82	85	78
	Satisfaction	67	69	64	67	68	68	69	66	67	68	68	60
	Gap	17	7	21	19	19	17	16	23	17	14	17	18
It shows news programmes / factual programmes that explain complicated issues clearly	Importance	81	73	82	86	81	80	81	87	81	78	82	75
	Satisfaction	61	55	58	63	66	58	62	59	60	62	61	49
	Gap	20	18	24	23	15	22	19	28	21	16	21	26
It covers big national events well, like sports, music events or major news stories	Importance	78	74	77	79	77	79	78	82	77	76	78	77
	Satisfaction	64	69	63	60	66	65	64	60	65	66	65	58
	Gap	14	5	14	19	11	14	14	22	12	10	13	19
Its regional news programmes provide a wide range of good quality news about my area	Importance	78	72	76	77	80	81	78	75	78	79	78	77
	Satisfaction	53	51	47	53	55	56	58	48	52	58	54	47
	Gap	25	21	29	24	25	25	20	27	26	21	24	30
It provides a wide range of high-quality and UK made programmes for children	Importance	78	73	81	75	77	89	100	76	78	77	77	83
	Satisfaction	47	***	50	43	45	n.a.	n.a.	35	48	52	46	50
	Gap	31	n.a.	31	32	32	n.a.	n.a.	41	30	25	31	33
It shows interesting programmes about history, science or the arts	Importance	69	55	62	69	76	73	74	74	69	67	70	63
	Satisfaction	48	46	40	48	53	51	54	49	48	49	49	44
	Gap	21	9	22	21	23	22	20	25	21	18	21	19
Its programmes show different kinds of cultures and opinions within the UK	Importance	69	69	70	71	69	68	68	72	69	67	68	80
	Satisfaction	47	55	48	47	48	44	44	43	48	48	47	48
	Gap	22	14	22	24	21	24	24	29	21	19	21	32
Its entertainment and factual programmes show people from different parts of the UK	Importance	66	65	65	67	66	68	66	65	66	68	66	70
	Satisfaction	51	60	51	50	49	50	48	45	51	53	51	51
	Gap	15	5	14	17	17	18	18	20	15	15	15	19
It portrays my region well to the rest of the UK	Importance	61	55	57	59	60	67	68	57	59	66	61	63
	Satisfaction	34	37	29	29	33	36	43	26	32	43	34	35
	Gap	27	18	28	30	27	31	25	31	27	23	27	28
As a result of watching its programmes I've become more interested in particular subjects	Importance	61	57	61	57	61	63	65	59	60	64	61	63
	Satisfaction	46	50	47	41	45	47	48	42	45	50	46	45
	Gap	15	7	14	16	16	16	17	17	15	14	15	18
Aside from news, provides range good quality programmes about region, made for people in region	Importance	61	57	55	59	62	67	66	55	60	66	61	63
	Satisfaction	33	40	28	31	29	35	38	23	32	40	33	30
	Gap	28	17	27	28	33	32	28	32	28	26	28	33
It shows high quality soaps or dramas made in the UK	Importance	56	55	53	51	54	60	60	51	55	60	56	50
	Satisfaction	51	61	52	48	48	49	49	44	51	54	51	49
	Gap	5	-6	1	3	6	11	11	7	4	6	5	1

Source PSB Tracker, 2007, UK adults aged 16+, Base = All respondents (5357). Amalgamated data: Jan 07, April 07, July 07, Oct 07. Statement about children's programming only asked of parents/carers of children in household

Characteristics: importance vs satisfaction – by subgroup

Statement		All 16+	16-24	25-34	35-44	45-54	55-64	65+	AB	C1C2	DE	White	Not White
It shows well-made, high quality programmes	Importance	84	77	85	86	86	83	84	90	84	81	84	79
	Satisfaction	59	66	60	58	58	54	59	55	60	60	59	55
	Gap	25	11	25	28	28	29	25	35	24	21	25	24
I trust this channel	Importance	84	79	82	90	84	88	79	84	84	83	85	73
	Satisfaction	53	59	55	51	52	49	53	50	51	58	53	46
	Gap	31	20	27	39	32	39	26	34	33	25	32	27
It shows programmes I want to watch	Importance	81	80	81	83	84	77	80	82	81	81	81	79
	Satisfaction	52	63	52	48	53	47	53	45	51	57	52	51
	Gap	29	17	29	35	31	30	27	37	30	24	29	28
It shows programmes that make me stop and think	Importance	76	73	78	78	78	73	75	80	77	73	76	78
	Satisfaction	49	57	50	49	48	45	49	44	49	52	49	47
	Gap	27	16	28	29	30	28	26	36	28	21	27	31
It shows enough new programmes, made in the UK	Importance	72	62	69	73	75	75	73	72	72	71	72	68
	Satisfaction	42	53	45	41	39	37	42	36	43	45	42	43
	Gap	30	9	24	32	36	38	31	36	29	26	30	25
It shows programmes with new ideas and different approaches	Importance	71	69	72	73	73	70	70	76	71	68	71	73
	Satisfaction	44	55	44	43	43	42	41	42	44	45	44	45
	Gap	27	14	28	30	30	28	29	34	27	23	27	28
Its programmes reflect the interests and concerns of people like me	Importance	69	67	71	70	70	68	67	69	70	68	69	76
	Satisfaction	45	51	42	43	43	45	45	39	45	48	45	46
	Gap	24	16	29	27	27	23	22	30	25	20	24	30

Source PSB Tracker, 2007, UK adults aged 16+, Base = All respondents (5357). Amalgamated data: Jan 07, April 07, July 07, Oct 07. Statement about children’s programming only asked of parents/carers of children in household

Purposes: importance vs satisfaction – by nation

Statement		All people 16+	England	Scotland	Wales	Northern Ireland
Its news programmes are trustworthy	Importance	86	86	87	86	87
	Satisfaction	64	63	67	67	67
	Gap	22	23	20	19	20
Its programmes help me understand what's going on in the world today	Importance	84	84	85	86	84
	Satisfaction	67	67	67	72	71
	Gap	17	17	18	14	13
It shows news programmes / factual programmes that explain complicated issues clearly	Importance	81	81	81	82	81
	Satisfaction	61	60	61	66	63
	Gap	20	21	20	16	18
It covers big national events well, like sports, music events or major news stories	Importance	78	78	77	79	80
	Satisfaction	64	65	61	65	65
	Gap	14	13	16	14	15
Its regional news programmes provide a wide range of good quality news about my area	Importance	78	77	79	81	83
	Satisfaction	53	53	48	57	61
	Gap	25	24	31	24	22
It provides a wide range of high-quality and UK-made programmes for children	Importance	78	77	80	84	79
	Satisfaction	47	46	46	53	52
	Gap	31	31	34	31	27
It shows interesting programmes about history, science or the arts	Importance	69	69	67	72	66
	Satisfaction	48	48	46	55	48
	Gap	21	21	21	17	18
Its programmes show different kinds of cultures and opinions within the UK	Importance	69	69	70	70	72
	Satisfaction	47	47	47	51	47
	Gap	22	22	23	19	25
Its entertainment and factual programmes show people from different parts of the UK	Importance	66	66	66	67	67
	Satisfaction	51	51	50	54	51
	Gap	15	15	16	13	16
It portrays my region well to the rest of the UK	Importance	61	59	70	69	80
	Satisfaction	34	34	30	40	34
	Gap	27	25	40	29	46
As a result of watching its programmes I've become more interested in particular subjects	Importance	61	61	61	64	61
	Satisfaction	46	46	44	50	49
	Gap	15	15	17	14	12
Aside from news, provides range good quality programmes about region, made for people in region	Importance	61	60	64	73	71
	Satisfaction	33	32	31	42	34
	Gap	28	28	33	31	37
It shows high quality soaps or dramas made in the UK	Importance	56	56	51	58	56
	Satisfaction	51	50	49	56	54
	Gap	5	6	2	2	2

Source PSB Tracker, 2007, UK adults aged 16+, Base = All respondents (5357). Amalgamated data: Jan 07, April 07, July 07, Oct 07. Statement about children's programming only asked of parents/carers of children in household

Characteristics: importance vs satisfaction – by nation

Statement		All people 16+	England	Scotland	Wales	Northern Ireland
It shows well-made, high quality programmes	Importance	84	84	83	88	83
	Satisfaction	59	59	58	63	60
	Gap	25	25	25	25	23
I trust this channel	Importance	84	84	80	86	86
	Satisfaction	53	53	52	53	51
	Gap	31	31	28	33	35
It shows programmes I want to watch	Importance	81	81	78	82	83
	Satisfaction	52	52	51	55	55
	Gap	29	29	27	27	28
It shows programmes that make me stop and think	Importance	76	76	76	78	79
	Satisfaction	49	49	49	52	49
	Gap	27	27	27	26	30
It shows enough new programmes, made in the UK	Importance	72	72	72	76	70
	Satisfaction	42	42	41	46	45
	Gap	30	30	31	30	25
It shows programmes with new ideas and different approaches	Importance	71	71	69	75	73
	Satisfaction	44	44	43	46	47
	Gap	27	27	26	29	26
Its programmes reflect the interests and concerns of people like me	Importance	69	69	69	72	73
	Satisfaction	45	44	45	47	47
	Gap	24	25	24	25	26

Source PSB Tracker, 2007, UK adults aged 16+, Base = All respondents (5357). Amalgamated data: Jan 07, April 07, July 07, Oct 07. Statement about children's programming only asked of parents/carers of children in household

Delivery of PSB purposes and characteristics – which channels rated highly by their regular viewers

Purpose 1

- High across a range of channels

Purpose 2

- BBC Two (BBC News 24, Sky News, UKTV History and Discovery Channel)

Purpose 3

- UK representation: main four channels, plus UKTV History and Discovery Channel (ITV1 strong on soaps and dramas)
- Region/nation representation to rest of UK: BBC, Sky News and Discovery Channel
- Children's: BBC One

Purpose 4

- BBC News 24, Sky News, BBC One, BBC Two, Channel 4

Characteristics

- Quality: BBC One, BBC Two, BBC News 24, Sky News, UKTV History, Discovery Channel
 - Originations: BBC One, BBC Two, BBC News 24, Sky News, UKTV History
 - Innovation: Discovery (on main channels, BBC Two and Channel 4)
 - Challenging: BBC Two, BBC News 24, Sky News, UKTV History and Discovery Channel
 - Engaging: UKTV History, Living, Discovery Channel
 - Reflecting people like me: Sky News
 - Trust: BBC, BBC News 24, Sky News, UKTV History and Discovery Channel
- NB single genre channels score particularly highly – people who watch these channels are very likely to value the content, which can lead to a halo effect. Many of these digital channels have niche appeal and achieve small audience shares.

Role of digital channels

Digital portfolio channels are seen to play a role in PSB, but are not seen as substitutes for the main five channels

- Half of respondents (53%, Q35) agreed that *'it is important that the main broadcasters as a whole provide additional digital channels'*. This rises to 68% among 16-24 year olds (importance declines with age), and 60% among people with cab/sat. However among people with Freeview (57%) there is no significant difference compared to all people 16+
- The deliberative study found that the main five channels are expected to remain 'destinations' even after all viewers take up digital services, this was largely related to navigation (main channels were seen as easier to find), familiarity and to a lesser extent trust. (Note: The portfolio channels' association with the main channels mitigated issues of trust, which were more evident in discussions about the commercial digital channels)
- However, some participants considered that portfolio channels could become destinations for PSB, and are already starting to do this (e.g. BBC Three was associated with UK comedy and More 4 which was seen to specialise in UK Drama, serious factual and current affairs programmes)
- Portfolio channels were seen by participants as having a different role to the main five channels, specialising in niche or experimental programming, and were also more convenient – not bound by traditional schedules
- The PSB Tracker asks regular viewers of channels for their ratings of how well PSB purposes and characteristics are delivered. Single-genre digital channels tend to score particularly highly, as someone who regularly watches the channel is by definition doing so because they like that particular genre.
- Thus, BBC single-genre portfolio channels are rated highly – BBC News 24 scores more than the terrestrial channels on issues relating to News
- Mixed genre portfolio channels – More4, E4, BBC Three, BBC Four, and ITV2, tend to score less well than the commercial digital single-genre channels, although there is some variation – for example, ITV2 is rated relatively highly at 55% saying it shows high quality soaps or dramas made in the UK – higher than for Channel 4 or Five

Commercial digital channels seen by some to deliver PSB purposes and characteristics

- Based on the different evidence sources (BARB, delib workshops, PSB Tracker) it would appear that some commercial digital channels have niche loyal audiences for whom the channel fulfils a need; however in comparison to terrestrial provision, viewers say such channels are complementary to, rather than replacements for, the main channels. But it seems that some digital channels did not appeal to everyone - non-viewers raised issues of trust, credibility and quality. For example in the deliberative research viewers of the History Channel were extremely positive about what they had learnt from the channel, whereas non-viewers thought the channel was unbalanced and sensationalist
- Some commercial digital channels are seen as delivering 'PSB type' content by some audiences
 - e.g. some participants in the deliberative study spontaneously mentioned channels such as Discovery Channel, National Geographic, Sky News as having 'social value' and offering high quality content. Some were aware that for example BBC content was shown on the Discovery Channel
 - Some single genre commercial channels (The Discovery Channel, UKTV History and Sky News) were rated very highly among their viewers across PSB purposes 1 and 2, less so on 3 and 4, and rated highly on most characteristics (PSB Tracker, 2007). Most of the other non-PSBs monitored are seen to revolve less around PSB Purposes and far more around the more production-oriented characteristics of PSB such as high quality and engaging content
- However, most, if not all, of the commercial digital channels have small viewing audiences, achieving share of below 5% in Freeview and cab/sat homes. This is partly driven by the sheer volume of choice and some channels' niche appeal either by genre (e.g. Discovery Channel - documentaries) or by audience (e.g. Disney Channel – children's).
- In the deliberative research there were issues raised about the commercial digital channels, particularly among non-viewers, around trust, credibility and quality
 - This was partly due to relative newness of these channels – they were less familiar to some, which led to some scepticism
 - Many participants were concerned about extent to which channels would be able to present impartial content or whether they would be used as vehicles for parent corporations to impart their own views (e.g. *Fox News*)
- The deliberative research identified that they could have a role to play in providing PSB type content from overseas which could help understanding of different perspectives and cultures
 - But there were concerns about using the commercial channels as a means of delivering 'official' PSB content in the future (e.g. commercial imperative at odds with PSB ethos, perceived to provide mainly imported rather than UK content) and the need to pay to access content¹

BBC News 24, Sky News and Discovery Channel score highly on Purposes 1 and 2



Please note context in interpretation of these results. Single genre digital channels achieve small audiences, and results are based on regular viewers so by definition respondents are interested in the genre.

Regular viewers of each channel – top 4 box score satisfaction

	Range for PSB main channels	BBC News 24	BBC Four	BBC Three	More 4	E4	ITV2	Sky News	Sky One	MTV	Living	UK TV History	Discovery Channel
P1: News programmes are trustworthy	43-75	83	50	44	39	n.a.	n.a.	87	n.a.	n.a.	n.a.	n.a.	n.a.
P1: Help me understand what's going on in the world today	44-79	89	53	42	42	n.a.	n.a.	89	n.a.	n.a.	n.a.	66	82
P2: Shows interesting progs about history, science or arts	30-77	n.a.	55	36	35	n.a.	n.a.	n.a.	37	n.a.	n.a.	84	89
P2: As result of watching become more interested in subjects	37- 56	60	45	40	42	35	43	65	36	39	45	75	77
P3: Covers big national events/major news stories	33-79	70	34	37	25	n.a.	35	82	33	42	n.a.	n.a.	n.a.
P3 Entertainment and factual programmes show people from different parts of UK	34-59	n.a.	39	42	36	38	37	n.a.	31	38	37	53	56
P3 Shows high quality dramas and soaps	32-66	n.a.	35	42	36	44	55	n.a.	28	34	49	n.a.	n.a.
P3: Portrays my region/nation well to rest of the UK	21-41	38	22	26	20	20	33	40	18	22	21	34	41
P4: Show different kinds of cultures/opinions within UK	34-55	62	39	39	38	36	36	70	32	31	39	48	61

PSB Tracker, 2007 All respondents, 7157. Base for individual channels: Self-reported regular viewers of each channel Regional/national genres statements not asked of digital channels. Not all statements are asked of all channels

BBC News 24, Sky News, UK TV History and Discovery Channel score highly on delivery of a range of PSB characteristics, especially quality, trust and engaging programmes

Please note context in interpretation of these results. Single genre digital channels achieve small audiences, and results are based on regular viewers so by definition respondents are interested in the genre.

	Regular viewers of each channel – top 4 box score satisfaction												
	Range for PSB main channels	BBC News 24	BBC 4	BBC 3	More 4	E4	ITV2	Sky News	Sky One	MTV	Living	UK TV History	Discovery Channel
Well made high quality programmes	47-76	71	57	56	62	61	63	75	62	43	65	83	84
Enough new programmes made in UK	28-53	51	48	47	34	40	42	52	27	20	31	51	50
Programmes with new ideas and different approaches	37-53	49	46	45	45	49	40	56	43	41	48	52	68
Programmes make me stop and think	39-65	66	50	39	41	37	36	68	40	25	41	71	79
Programmes I want to watch	51-64	64	49	48	63	71	60	68	65	55	73	78	83
Reflect interests and concerns of people like me	33-55	60	40	40	39	42	44	74	40	45	42	62	64
I trust this channel	46-73	79	63	61	57	51	45	83	46	45	59	81	81

PSB Tracker, 2007 All respondents, 7157. Base for individual channels: Self-reported regular viewers of each channel. Regional/national genres statements not asked of digital channels.

The role of the internet

Role of the internet

Perceived primarily as source of information and learning

- 91% of people with broadband stated they had ‘personally learnt useful things from the internet’, compared to 83% of all people for TV (PSB Review survey)
- The internet and TV were both seen to have an important role to play in ‘making people interested in different subjects’ (78% of 16+ agree for TV vs. 74% for internet among broadband users, PSB Review survey)
- Just under half of internet users (47%) stated their main reason for using internet was to ‘find out or learn things’ (Media Literacy Audit, 2007)
- Within the deliberative work, the internet was strongly associated with personal interests and finding out more about subjects already interested in, but not seen to have the power of serendipity that the main TV channels possessed

Social role

- The internet and TV were both seen to have an important social role to play (79% of all 16+ agree for TV vs. 75% for internet among broadband users, PSB Review survey)
- However, TV had a clear edge over the internet as a tool for shaping public opinion, with four fifths of 16+ (78%) agreeing that TV was ‘very influential in shaping public opinion about politics and other subjects’ vs. 51% for internet among broadband users (PSB Review survey)
- TV was also seen by more people to have a role in helping ‘to promote understanding of different religions, cultures and lifestyles’, with 75% of all 16+ agreeing for television vs. 61% for internet among broadband users (PSB Review survey)
 - However, among 16-24s this gap is much less (73% of 16-24s for TV and 70% for internet among 16-24 broadband users)

Entertainment

- In contrast to TV, the internet was not associated with entertainment for the majority of people. Just one fifth of people claimed their main reason for using the internet was for fun, relaxation or pass the time.
 - However this rose to 26% among younger people (16-24 years, Media Literacy Audit, 2007).

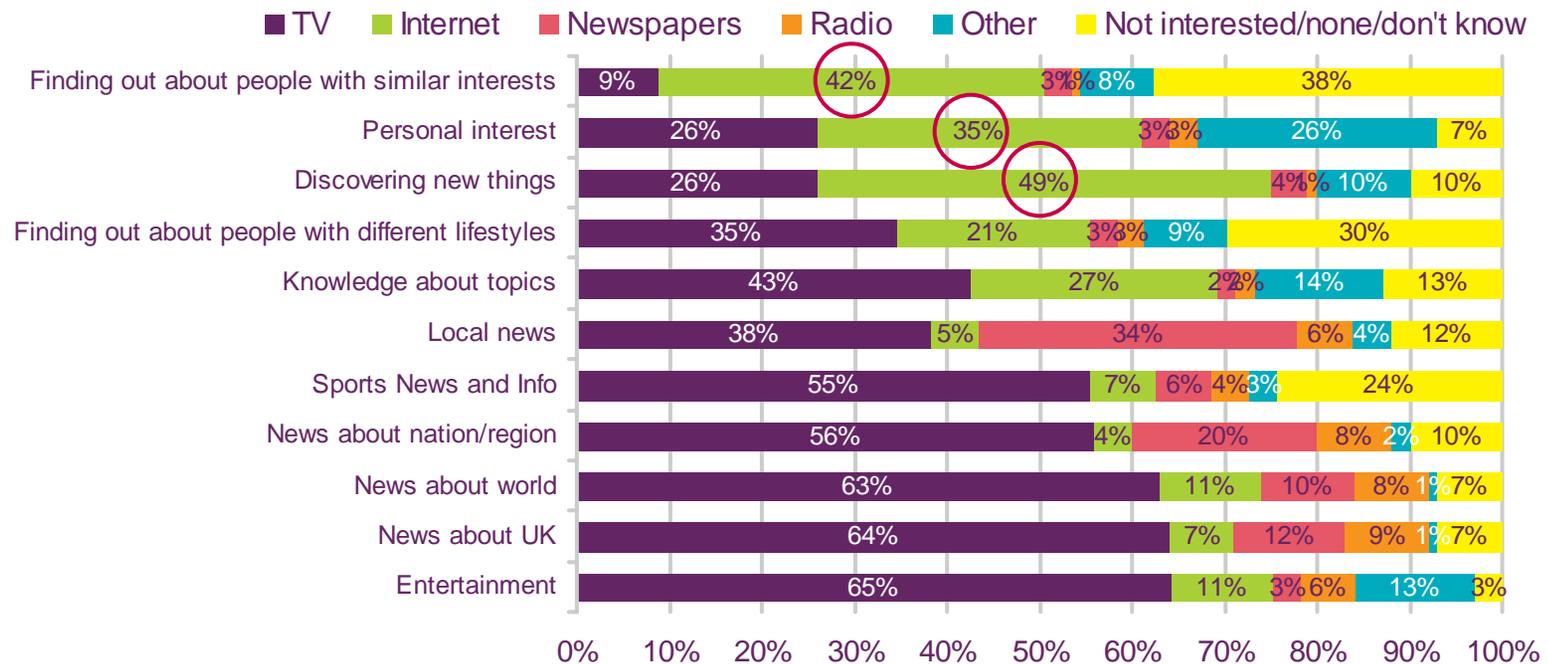
Contacting people

- The main reason for using the internet for a sizable minority (23%) was for contacting people (Media Literacy Audit

Online seen to have a role to play in PSC, especially amongst younger people

- Among internet users, when asked about PSC purposes and characteristics (PSB online survey, 2007) high importance was placed on the news and information about the world, as well as catering to specialist interests or individual needs.
 - Over two thirds of respondents thought provision of high quality and UK-made content for children and local area content were important, both of which score low on delivery.
 - Trust and high quality were deemed of high importance but were seen to be less well delivered
- Internet is seen as powerful platform for educational content.
 - Active learning seen as a solitary, interactive process – more appropriate for the internet than the television
- PSBs seen to have a role to play in delivering online content
 - Half of the public think that it is important that *the main TV broadcasters as a whole provide websites which provide additional content about different topics including news and entertainment* (53%, rising to 70% among those aged 16-24 and those with access to broadband, PSB Review survey)
 - The ways in which people are prepared to access PSB content is changing. There is a substantial minority of people (44%) who support the main broadcasters' provision of TV content via their websites that allow content to be watched when you want to watch it. This rises to 56% among 16-24s and 59% among people with broadband. (PSB Review survey)
- As with the digital channels, however, there was a sense in the deliberative workshops that the Internet should be used to *complement* rather than *replace* PSB content on the main five channels (the exception being programmes for schools). Driven by the following concerns:
 - Relatively limited access - internet penetration rates are expected to increase, but not to the same extent as multichannel TV
 - Lack of skills
 - Trust - while websites provided by the main five broadcasters are credible, there is scepticism about sites such as *Wikipedia*

Among people with broadband, TV remains main source for most media interests, but internet is most named source for finding out about people with similar interests, personal interests, and discovering new things

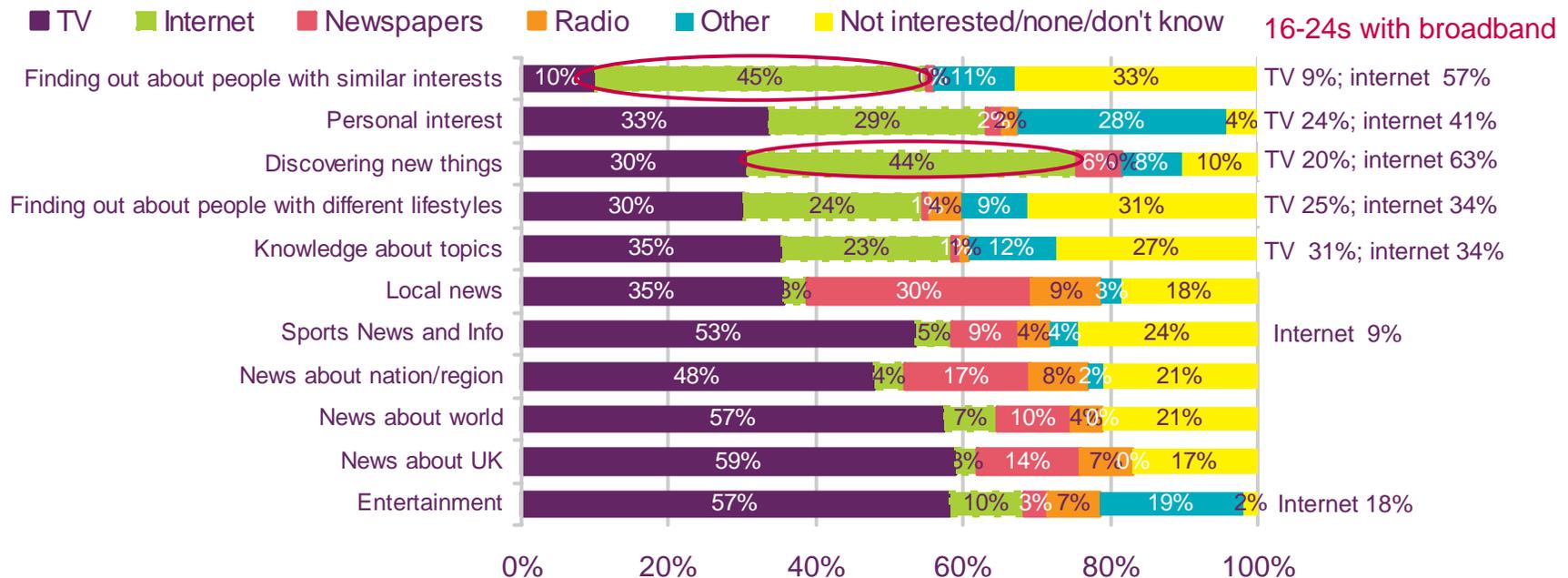


Source PSB Review survey: Q12: interviews people with broadband access at home, October-December 2007

Among 16-24s, TV is main source for most media interests, but internet is most named source for finding out about people with similar interests and discovering new things

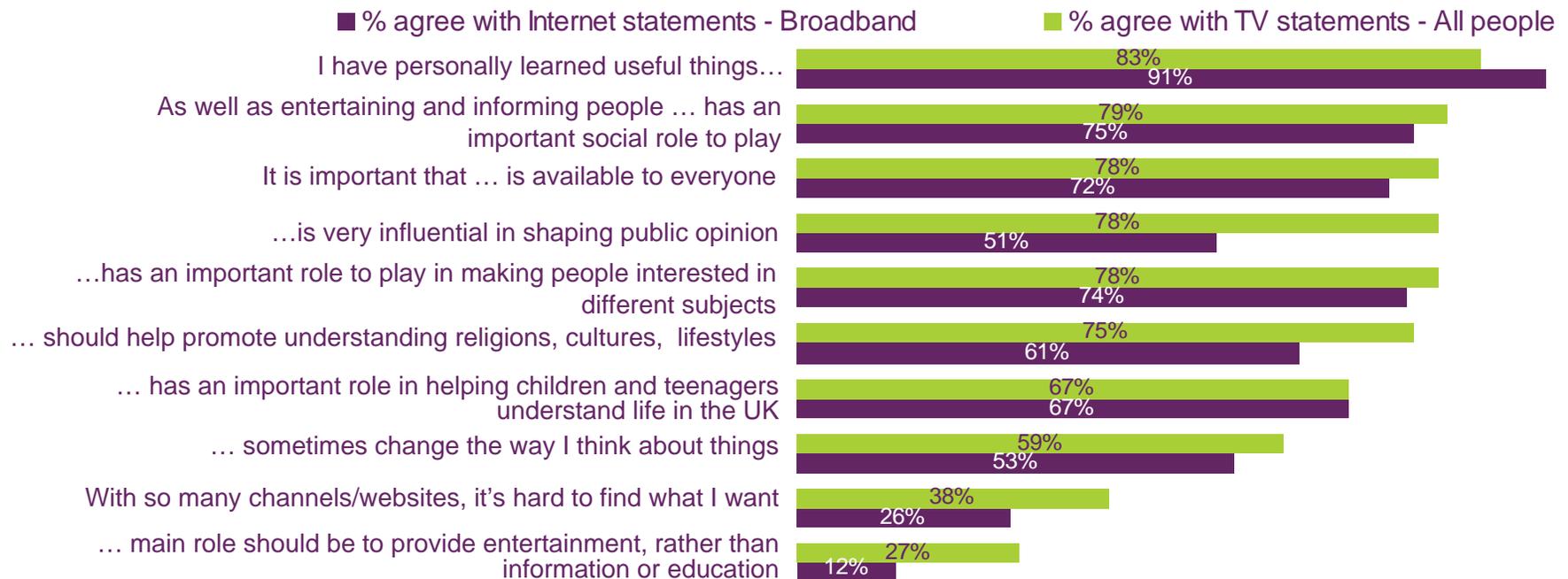
Among 16-24s with broadband, personal interests, finding out about people with different lifestyles and knowledge about topics also rank #1. However TV still key for all types of news and entertainment

Which of these media would you say is your main source for ...?



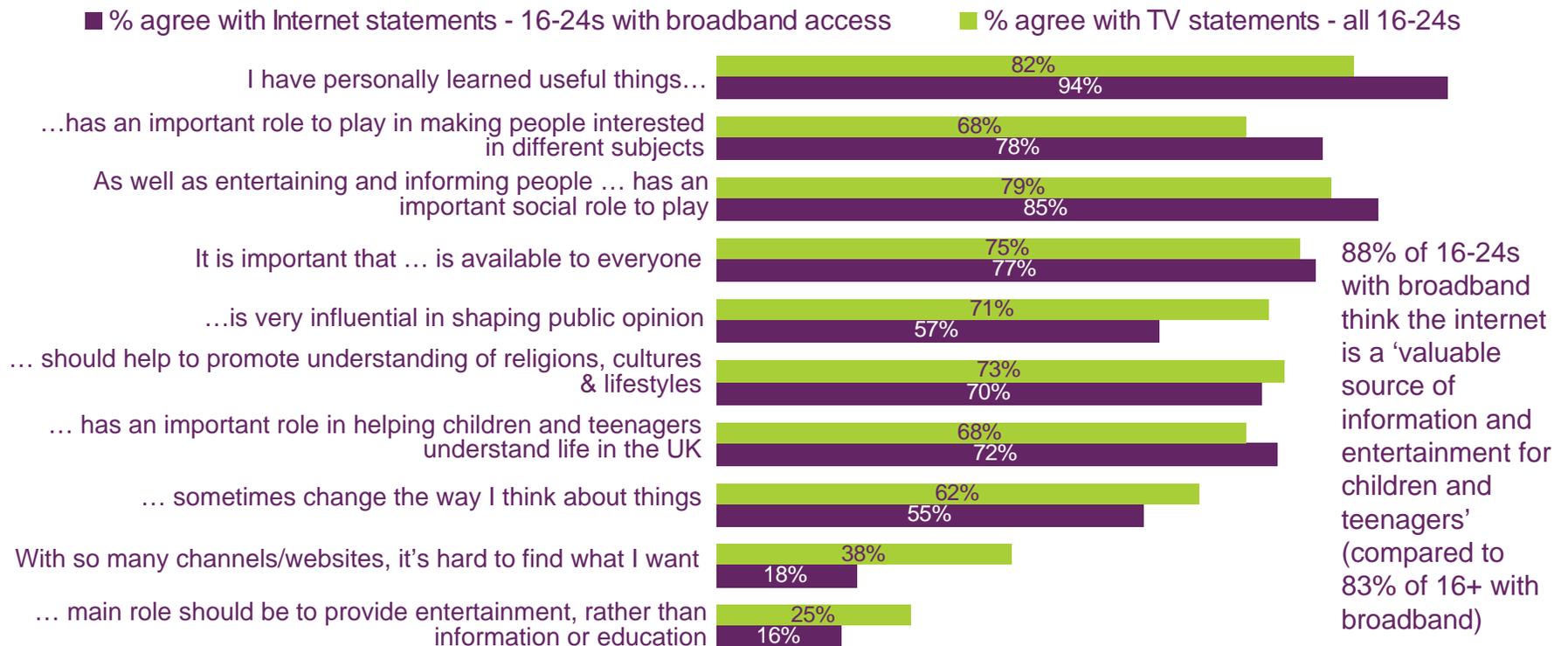
Source: PSB Review survey: Q12: interviews 16-24 years, October-December 2007. Note TV = combination of responses to TV on main channels and TV on digital channels.

TV has the edge on shaping public opinion and promoting understanding of religions & cultures, the internet is valued for learning



Source: PSB Review survey Q14, Q15: 2,260 UK adults aged 16+, October - December 2007. *Base for internet statements: 946 people with broadband access at home

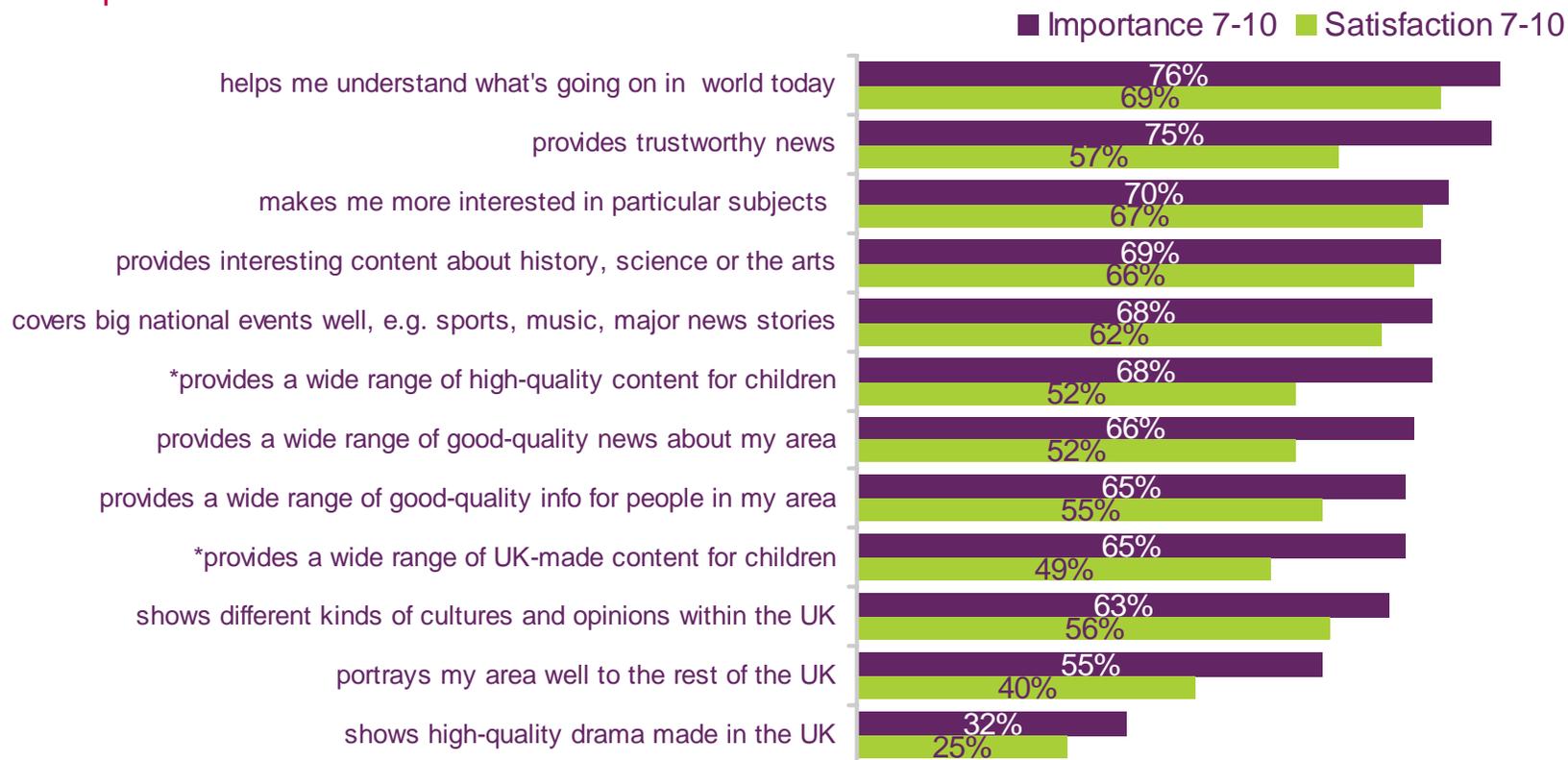
Among 16-24s, TV has the edge on shaping public opinion but not on promoting understanding of religions & cultures. Internet is valued for learning



Source: PSB Review survey 16-24 years, October - December 2007 *Note: This comparison is based on media access, ie all 16-24s with tv compared to 16-24s with broadband. If we compare attitudes towards TV and internet among broadband users, then results differ slightly, although general conclusions remain the same. For example personal learning for TV rises to 86% among 16-24s with broadband*

Among online respondents, PSB Purposes online: Importance and satisfaction relating to the internet (1)

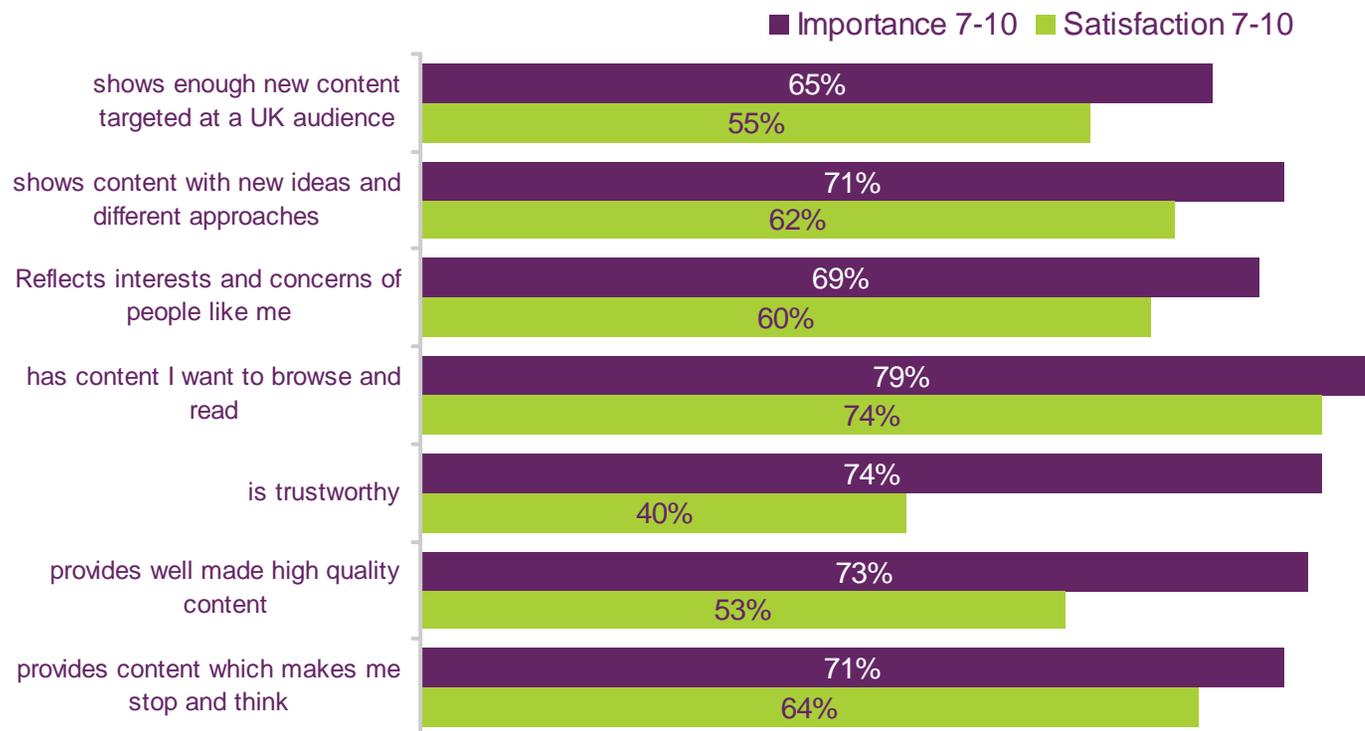
How important do you think it is in general that the internet.....
% top 4 box scores



Source: PSB Online Survey Q23 How important do you think it is in general that the internet.....
Total sample = 3003 (most statements), those responsible for children <16 = 868 (*2 children-related statements)

Among online respondents, PSB Characteristics online: Importance and satisfaction relating to the internet (2)

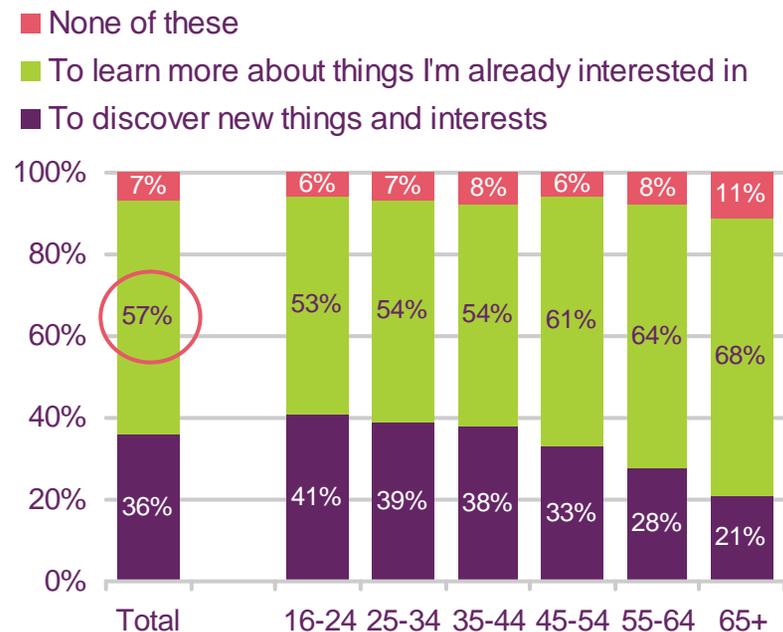
How important do you think it is in general that the internet ...
% top 4 box scores



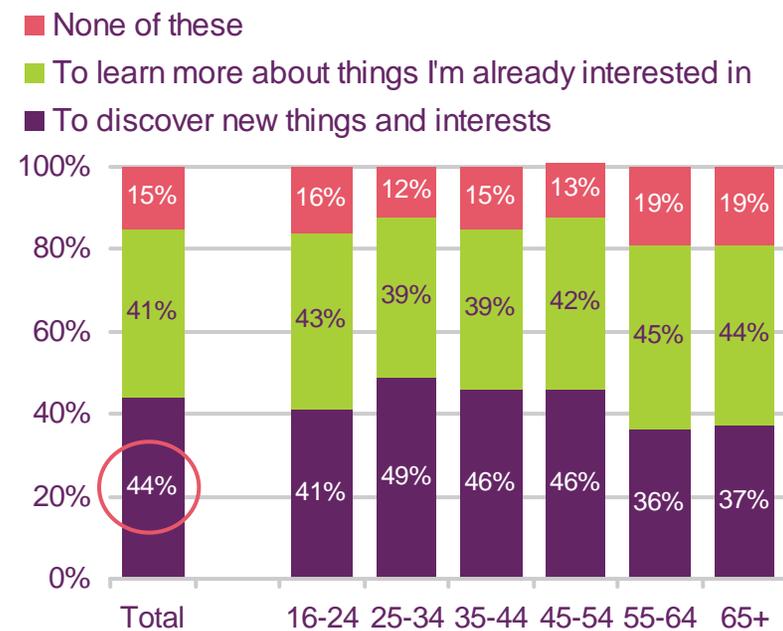
Source: PSB Online Survey Q23 How important do you think it is in general that the internet.....
Total sample = 3003 (most statements), those responsible for children <16 = 868 (*2 children-related statements)

For online panel respondents, the internet is preferred as a tool to extend existing interests and knowledge

The internet



TV

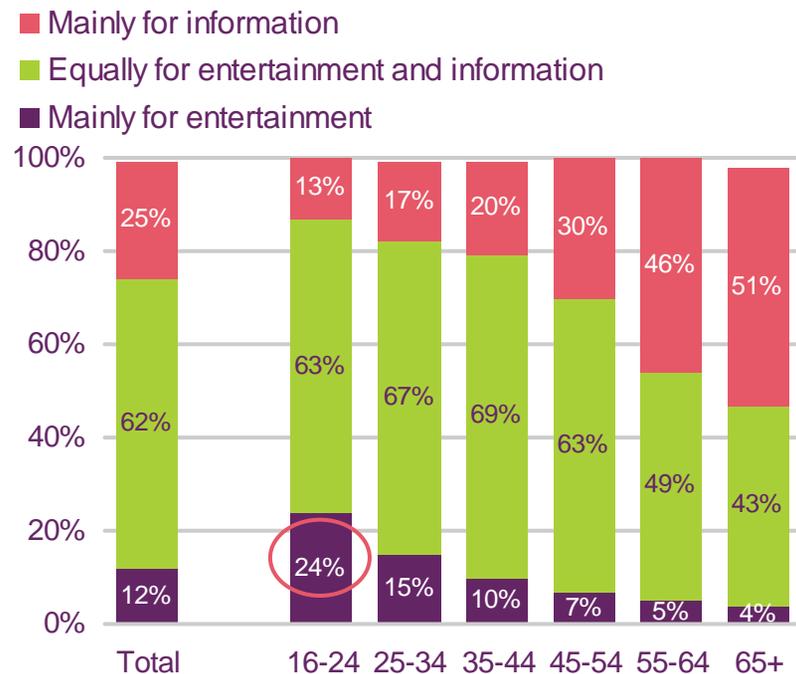


Source: PSB online survey 2007, n=3003

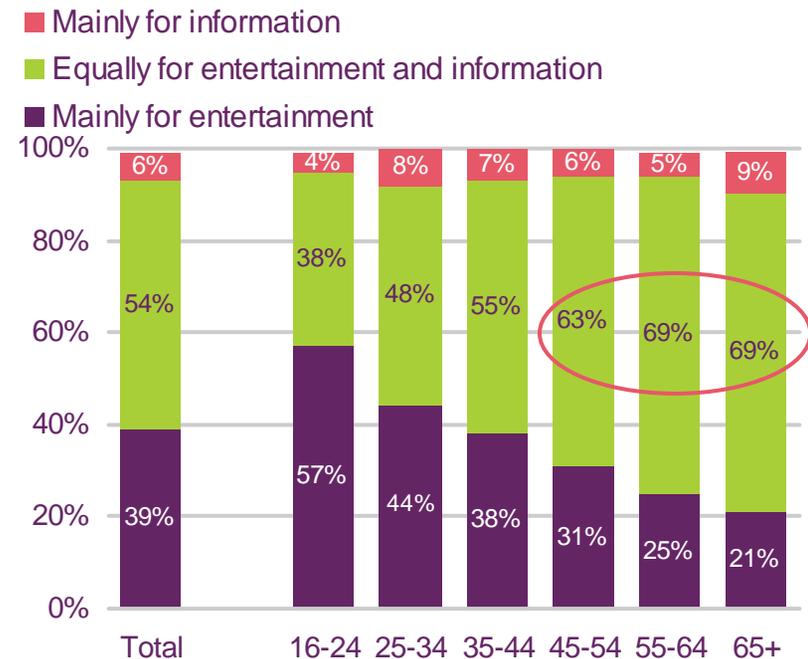
Q29/19 Which of the following statements best describes the way you use the internet/TV?

For online panel respondents, the internet tends to be associated with information, and TV with entertainment. Both media are seen by the majority to be equally for entertainment and information. There are signs that some younger people see the internet as mainly entertaining, and some older people more minded to see TV as mainly informative

The internet



TV

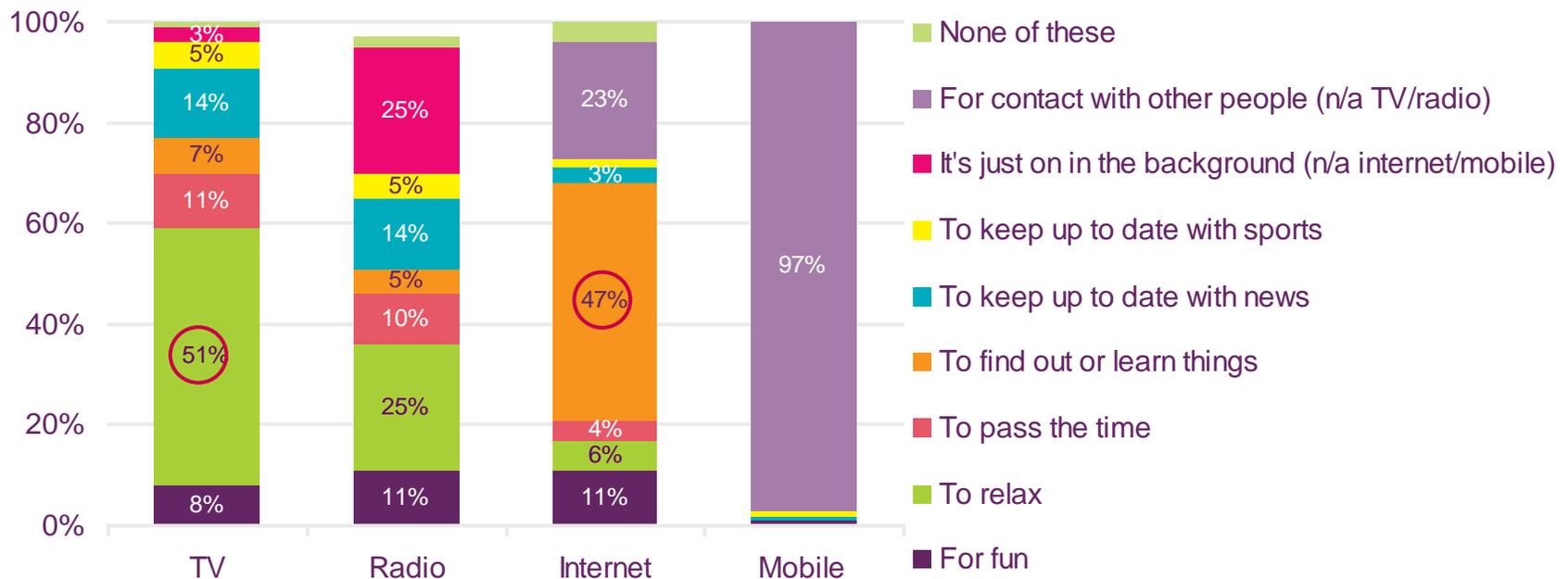


Source: PSB online survey 2007, n=3003

Q19/28 Which of the following best describes how you use the internet/TV?

Across all adults, main reason for watching TV is to relax, whereas the internet's primary function perceived as finding out or learning things

Main reason for using media – all adults – who use each platform

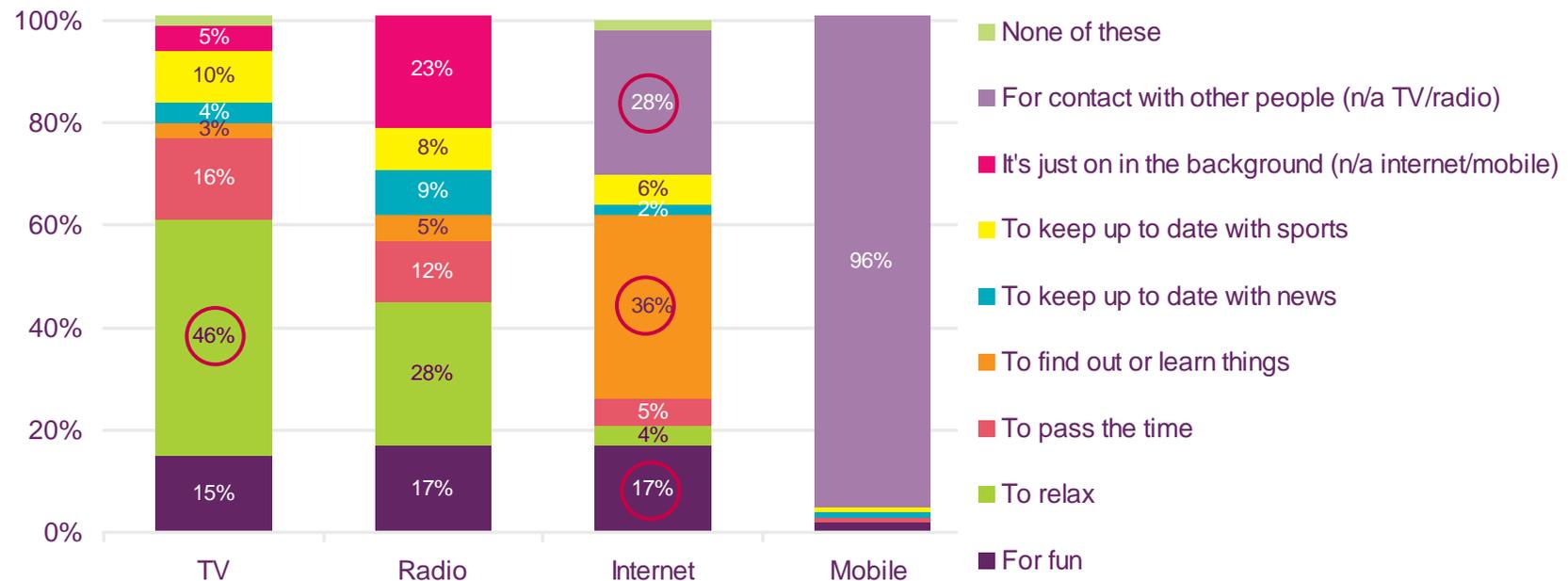


Source: Media Literacy Audit 2007, n=2900

Base: those that have/use each platform

Among 16-24s, the main reason for watching TV is to relax, whereas the internet has three major functions – finding out about things, contacting people and for fun

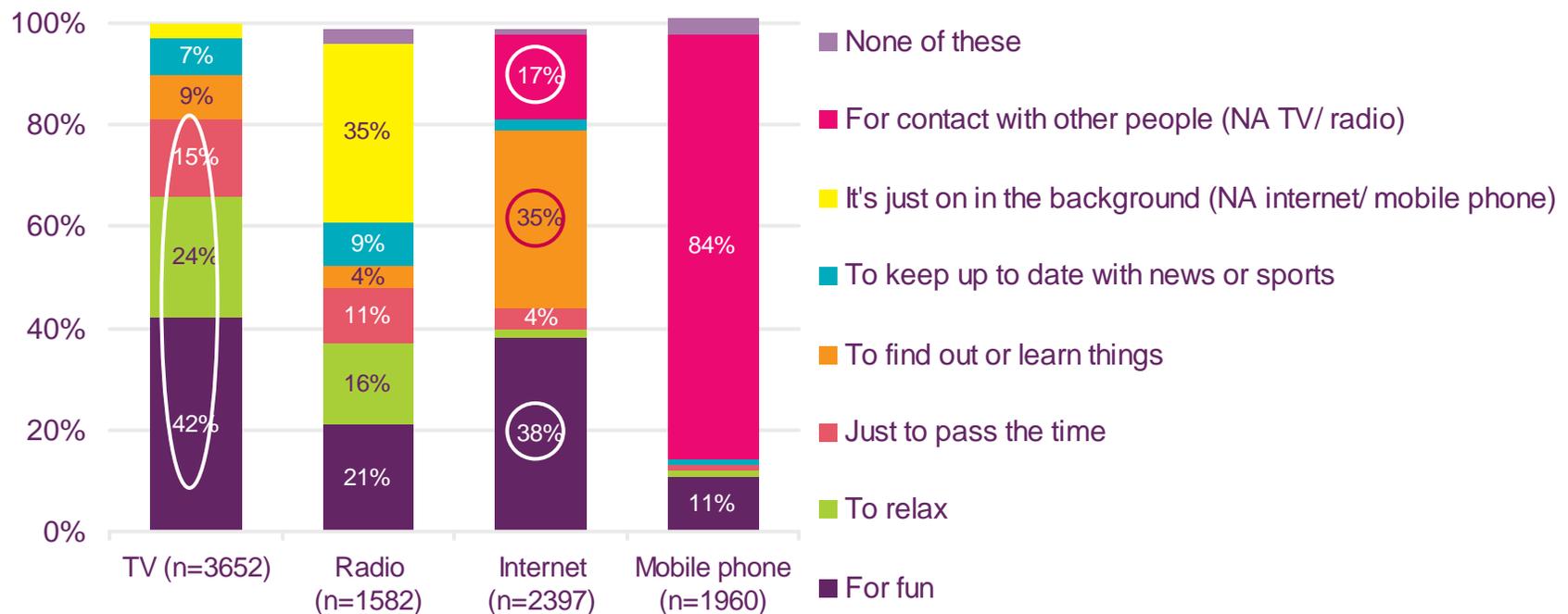
Main reason for using media – 16-24s who use each platform



Source: Media Literacy Audit 2007, overall n=2900
Base: those that have/use each platform

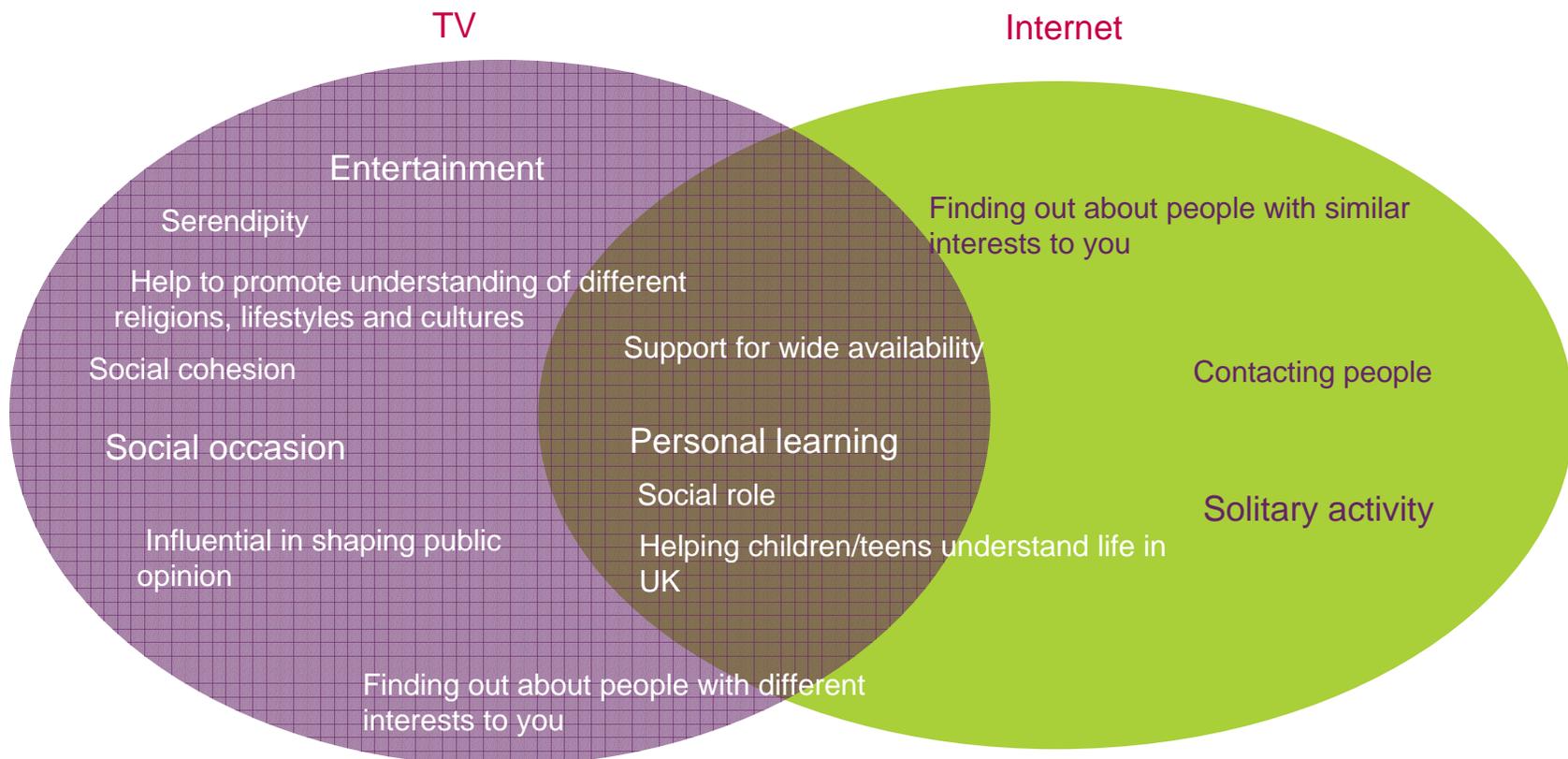
Among children, the main reason for watching TV is for fun/relaxing/passing the time, whereas the internet has three functions – fun, finding out about things, and contacting people

What is your one main reason for using each medium – children 5-15 who use each medium



Source: Young People's Media Tracker, 2007, QC8B/ QC15B/ QC24B/ QC37B Base: Children aged 5-15 who use each type of media at home April to September 2007

TV and internet have complementary and shared roles



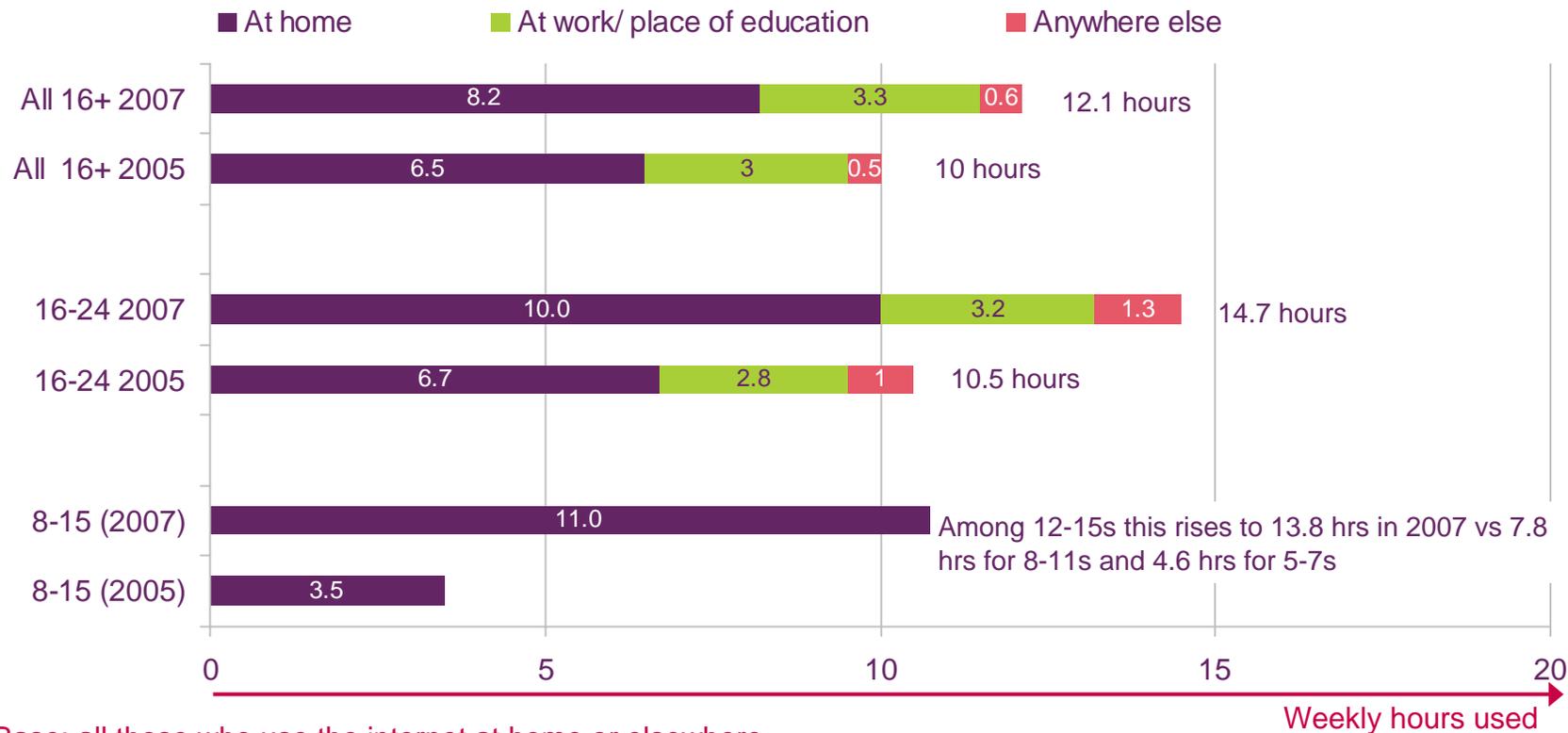
Source: Ofcom visual representation of Ipsos Mori deliberative and quant studies, ML 2007

Television and internet usage

- According to Ofcom's Media Literacy Audit results, the amount of time people say they spend online has increased from 10 to 12.1 hours from 2005 to 2007, driven by increase in time online at home (up from 6.5 to 8.2 hours per week)
 - Among 16-24s it has increased significantly by 40% from 10.5 to 14.7 hours per week with home usage rising from 6.7 to 10.0 hours (ML, 2007)
 - Among 8-15s claimed time spent online at home has risen from 3.5 to 11 hours per week (Young People's Media Tracker, 2007)
- Although time spent watching TV has declined slightly since 2003 (by 3%, with the greatest decreases among 16-24s and 4-15s), it still remains the medium people spend the most time on at home
 - 8.2 hours per week on internet at home compared to 25 hours 12mins on television
 - Although younger people watch less tv than older people, and spend more time online, they still spend more time watching tv than online (10.0 hours online vs. 18 hrs 8mins on television)
- We have only a very limited amount of research to investigate if there is a causal relationship between the decline in TV viewing and the increase in internet usage at home
 - Among those people who claimed they watch less television on the main TV channels now than 4 or 5 years ago, the most common reasons given among people with broadband access were 'less time to watch TV' (31%), 'watching more of digital channels' (32%) and 'using internet more' (30%)
 - Among 16-24s the main reason was 'less time to watch TV' (40%), with 'using internet more' being cited by 20%
 - 35-44s is the age group most likely to give the reason that they are using internet more

Time online increased for all 16+ by 20% from 2005 - 2007 – and among 16-24s increased by 40%

Hours of claimed weekly internet use – All people 16+, 16-24s, 8-15s

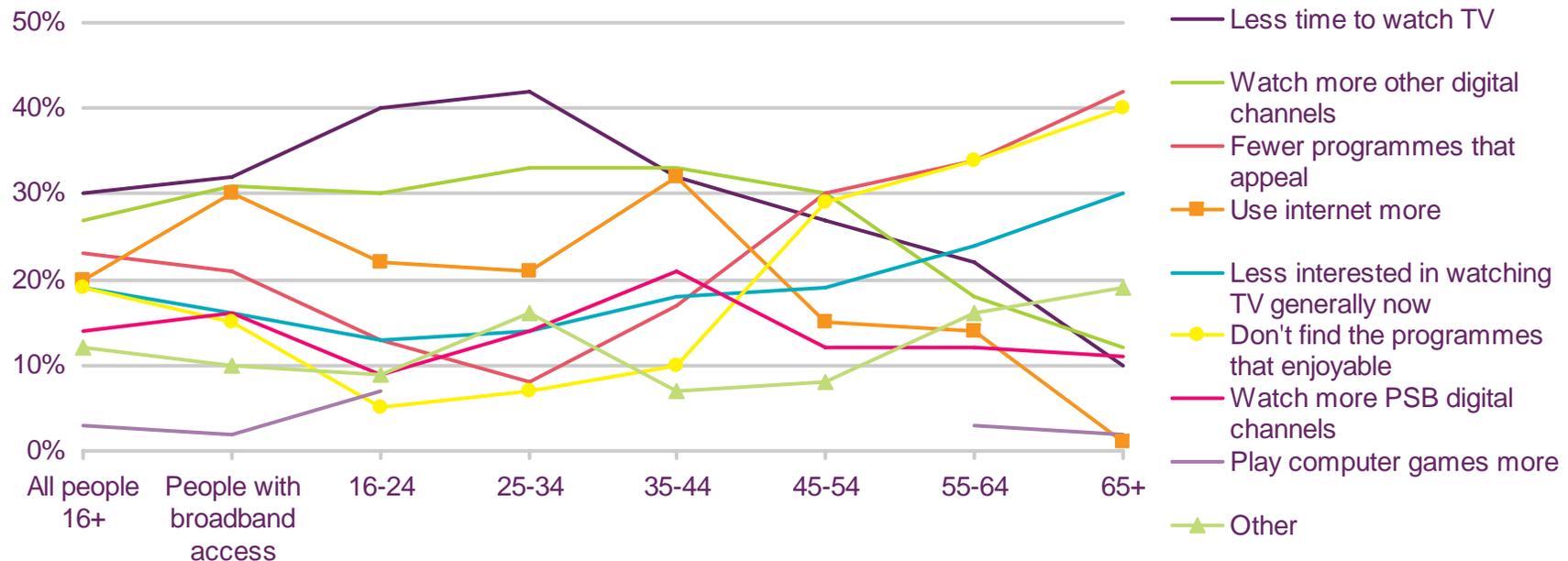


Base: all those who use the internet at home or elsewhere

Source: Media Literacy Audit 2007 and MLA 2005; Young People's Media Tracker 2007

Reasons for viewing less of main TV channels than 4-5 years ago

- Of those respondents who said they were watching less TV than 4-5 years ago (39% of 16+) , they were asked the reasons why
- By age, the most common reason for 16-24s to be watching less is 'less time to watch TV' rather than specifically 'using internet more'; 35-44s is the age-group most likely to give the reason that they are using internet more
- Among people with broadband 'less time to watch TV', 'watching more of the other digital channels' and 'using internet more' all cited by approx. 30% of people



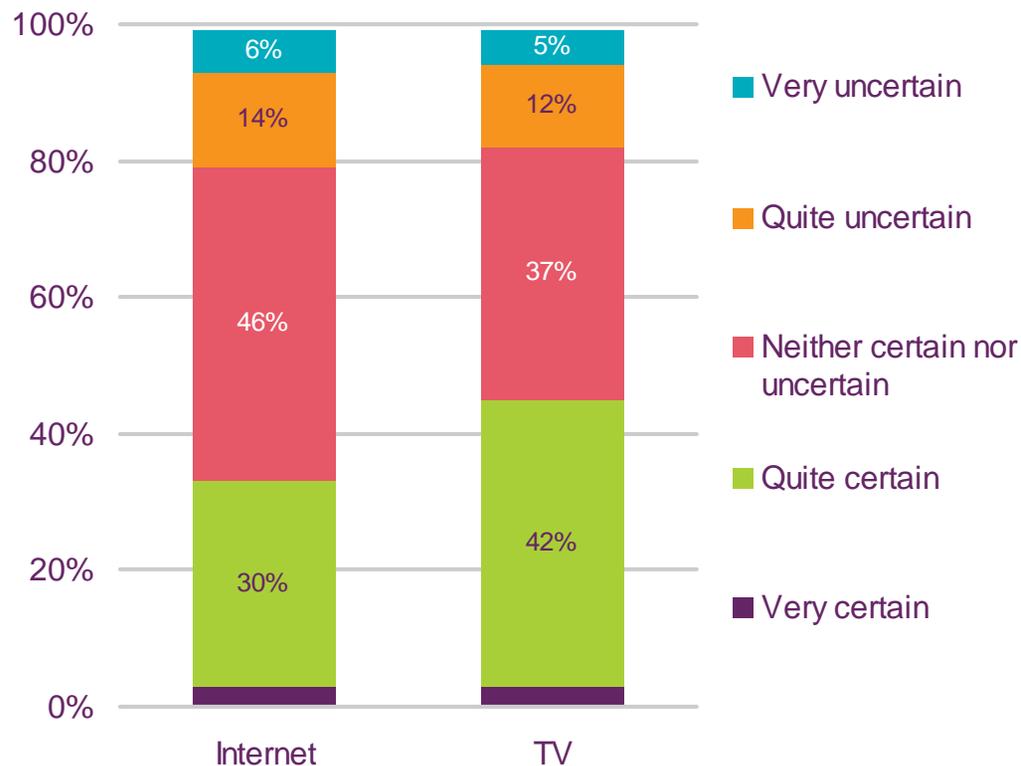
Source: PSB Review survey: Q17: 908 interviews with those who say they are watching less TV than they did 4-5 years ago, October –December 2007

Levels of trust in TV and internet, and the extent of online navigation

Trust and online navigation

- The issue of trust is an important element of PSB provision. **Levels of trust** in TV and the internet vary according to the type of user and the formulation of the question
 - Online panel responses indicate that the internet is less trusted in terms of the accuracy of its content in general than TV is – 33% say they trust the internet compared to 45% for TV (PSB online survey)
 - According to MLA data, the two platforms are equal - some 42% of internet users say they trust the internet, and 41% say they trust TV (MLA 2007)
 - When people are asked at a more granular level about particular TV channels, levels of general trust are higher – over 70% of the BBC's regular viewers say they trust it, and three-fifths of ITV1 and Channel 4 regular viewers. Levels of trust are higher in particular news/factual single-genre channels such as BBC News 24 (79%); UKTV History (81%), and Sky News (83%) (PSB Tracker)
- Levels of trust in the internet are also likely to be related to the extent to which people make wide or narrow use of the platform. **Navigation of online content** – its findability – was a key PSB determinant in the deliberative research: people felt that content needed to be easily accessed in order for it to be deemed public service.
 - When asked about online behaviour in a typical week, internet users tend to say they mostly stick with what they know, although one in five (19%) says that they visit a lot of new sites (MLA 2007)
 - This is stratified by age – rising to one quarter of 16-24s, and only 10% of over 65s – although people aged 45-54 also appear to be more likely to visit new sites

For online panel respondents, TV is trusted more than the internet, although levels of distrust for both platforms are similar



- However, according to MLA data, the two platforms are equal - some 42% of internet users say they trust the internet, and 41% say they trust TV (MLA 2007)

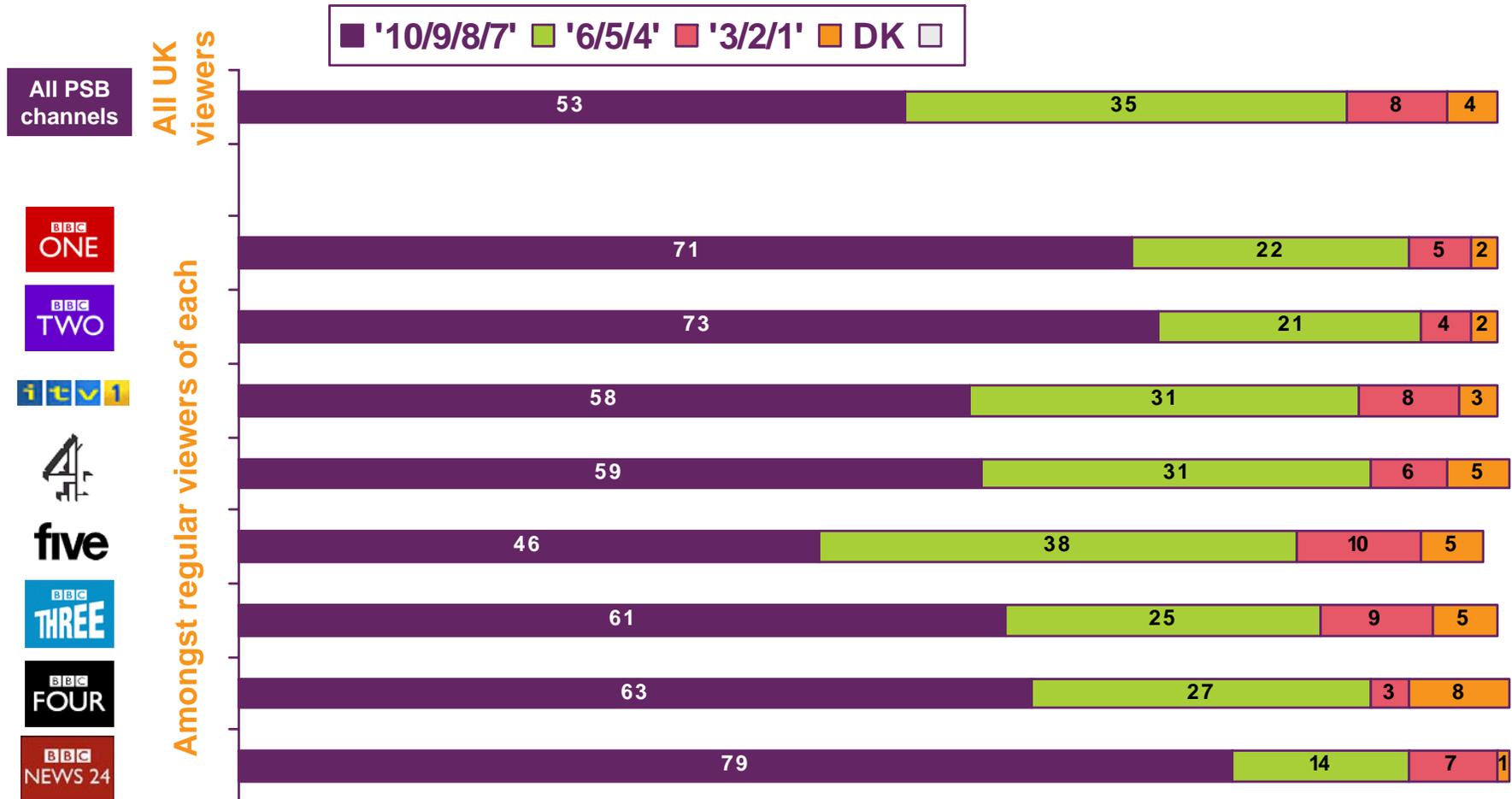
Source: PSB online survey 2007, n=3003

Q32/21 How certain are you that you can trust the accuracy of what you read/see on the internet/TV?

PSB Tracker responses to “I trust this channel” vary



Extent to which the purpose/characteristics applies to the channel(s), where 10 means ‘applies completely’ and 1 means ‘does not apply at all’



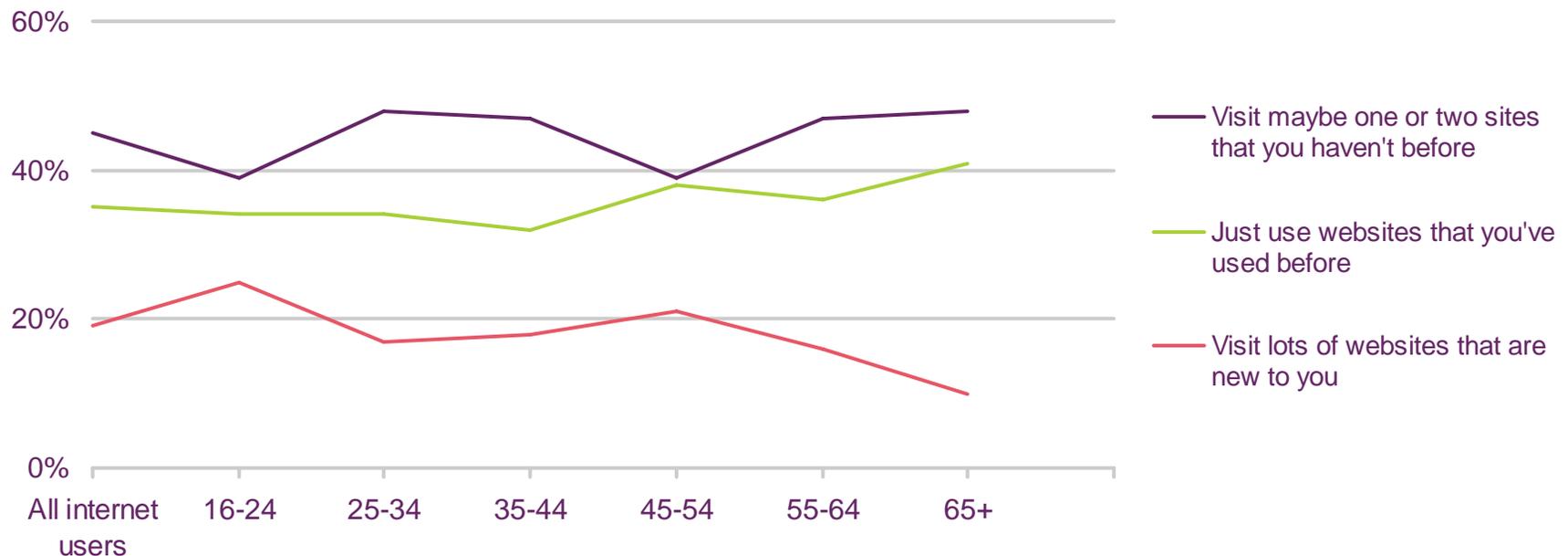
Source: PSB Tracker. Base for ‘all PSB channels’: All respondents, 1809 * Small base size; ** Very small base size – data should be viewed as indicative only

Base for individual channels: Self-reported regular viewers of each channel (Oct 07 only)

BBC1 = 1215, BBC2 = 595, ITV1 = 900, Channel 4 = 613, five = 337, BBC3 = 110, BBC4 = 70*, BBC News 24 = 286

Use of many new websites is not widespread

- When asked about online behaviour in a typical week, internet users tend to say they mostly stick with what they know, or visit one or two new websites, although one in five (19%) says that they visit a lot of new sites
- This is stratified by age – rising to one quarter of 16-24s, and only 10% of over 65s



Source: Media Literacy Audit 2007, overall n=2900; base = those who use the internet at home or elsewhere, n=1723
Q = "In a typical week, would you say that you....."

Nations and regions provision

Nations and regions news and non-news

- Levels of support for various elements of nations/regions provision are nearly always higher in the **devolved nations** than in **England**, although within **England** opinions vary considerably - and are lowest of all in the London region
- Levels of support have stayed at similar levels or increased since 2003 – there are no signs of the appetite for nations/regions provision abating

Nations and regions news

- News remains the key element of nations and regions provision. Provision of regional/national news was one of the key genres that respondents in the PSB Review survey survey thought was important that the main channels provide (88% agree)
- 84% agreed that ‘TV is an important source of news about my nation/region’ and this rises to over 90% in each of the devolved nations
- When asked in the PSB Review survey survey if people thought ‘News about my region/nation is generally of a high standard’ satisfaction levels are fairly high (and a comparison with 2003 suggests an increase from 55% to 67%), although they tend to be somewhat lower for **England** and for **Scotland** compared to **Wales** and **Northern Ireland**
 - Within **England**, satisfaction is higher in the north and lower in central/east, and particularly in London
 - Comparatively lower levels of satisfaction in **Scotland** may be linked to higher usage of press for regional/national news

(See also plurality of nations/regions supply)

“Non-news” programmes

- Opinions are more mixed, but views in the **devolved nations** are more positive than those in **England** – although within England, opinions are more positive in northern England than in the south/east, particularly London
 - Current affairs programmes are more highly rated than other types of non-news content
- The *principle* of dedicated programmes for each devolved nation is articulated strongly given the particularity of cultures and politics, but deliberative research indicates that satisfaction with “non-news” programming is lower than for network programmes, not least because of the overriding importance of programme quality for respondents. These views were also expressed in the 2004 PSB research
- The PSB Tracker 2007 shows there is a wide gap between importance and satisfaction for the statement ‘Aside from news, it provides a range of good quality programmes about my region/nation, made for people in my region/nation’; **Northern Ireland** (37% gap), **Wales** (31% gap) **Scotland** (33% gap), and **England** slightly less so (28% gap)

Plurality of supply: Nations and regions

- Across the research, findings show that plurality of supply is seen as important to viewers.
- Plurality of supply of nations/regions **news** is seen as particularly important – in a list of 17 PSB programme types and attributes, nations/regions news comes 3rd in terms of what "should be shown on more than one channel" (76%) – with people in Northern Ireland more likely to see it as important (86%).
- Our deliberative research showed plurality to be an important component: to hear different views; to encourage competition for quality; and to reflect increasingly different opinions and strata within UK society. That said, some programme types were seen as more important to provide on a plural basis than others.
 - Nations and regions news was one of the key programme types that were seen to require plural supply on the main five channels, even in the future with more content available on digital platforms. People expected the main five channels to remain default channels after 2012, and saw them as familiar and trusted. They felt that for news programming in particular, it was important to have more than one source, to help ensure that a variety of views were catered for.
- When people were asked specifically whether it was important for ITV1 as well as the BBC to provide nations and regions news programmes there were high levels of agreement (83%). Responses were higher in the devolved nations than in England (82% in England compared to 91% in Wales, 93% in Northern Ireland and 94% in Scotland)
 - Comparison with 2003 results indicate that levels of agreement to this statement have increased: 75% in 2003 and 83% in 2007 among all 16+*
- In the PSB Review survey, non-news regional/national programmes come 10th in the list, and are seen as more important to provide on more than one channel by people in the devolved nations than in England (63% in England compared to 71% in Wales, 73% in Scotland, and 78% in Northern Ireland)
 - The deliberative workshops in the devolved nations underlined this view. They felt that plural supply was necessary for other types of nations programming as well – something that was not echoed about national/regional programmes in the workshop in London.

* Need to treat comparisons between 2003 and 2007 with caution – see appendix

Representation across the UK (1)

- In the deliberative workshops, true-to-life representation of the nation or region was seen as important for broadcasters to portray. Many in the workshops outside London felt that their region or nation was not being portrayed adequately – a particular issue raised in Birmingham, and in the devolved nations. This concern echoes previous research carried out as part of the 2004 PSB Review
- In comparative terms, views about the representation of the nation/region across the UK are deemed important by a majority; although perceived as less important than various other elements of PSB in relative terms
 - In the list of PSB Tracker statements, "reflecting my region/nation well to the rest of the UK" comes second from bottom in importance, albeit still 3 in 5 or 61% agree. It is rated more highly in the devolved nations – (70% of those in Scotland, 69% of those in Wales, and 80% of those in Northern Ireland)
 - "Programmes that take place in different parts of the UK" on a list of different elements of PSB are rated as important to provide on the main channels by 76% of respondents, but in comparative terms comes just below half-way down in terms of importance (9th out of 15), below news and information and UK-made content. Scotland (8th) and Wales (10th) are higher than England, or Northern Ireland (Northern Ireland responses in this part of the survey are consistently lower than those from Scotland or Wales wherever the term "UK" is mentioned in the statement, but higher when the term "your nation" is used) (PSB Review survey)
 - When asked how important it is to show 'programmes which take place in different parts of the UK/your nation' results rise significantly in the devolved nations (75% England, 89% Scotland, 87% Wales, 85% Northern Ireland)

Representation across the UK (2)

- When asked specifically about whether it is important for ITV1 to show programmes that “are made in a variety of different parts of the UK”, 70% are in agreement overall, with responses higher for Scotland and for Wales
- There are wide gaps between viewers’ perceived importance of and satisfaction with PSB channels as a whole “reflecting the nation/region well to the rest of the UK”, particularly for **Northern Ireland** (46% gap) and **Scotland** (40% gap); (**Wales** = 29% gap and **England** = 25% gap) (PSB Tracker)
- In broad terms, representation on the network is seen as consistently more important by those in the devolved Nations, somewhat less so by those in England
- As a standalone concept representation is highly appreciated, but in terms of ranking versus other elements of PSB, it is not highly placed, and is less highly placed in comparison to nations and regions news and current affairs.

Local content

- There is interest in more local news and information content on TV (78% responding positively to the statement ‘I would like the main channels to show programmes that give me news and information about my local area). There are no significant differences in response in the devolved Nations (PSB Review survey)
- It is important to note the differences between nations in terms of where local news comes from, as this may explain the lack of increased appetite in the nations – in other words, that other sources are more common for local information, and therefore interest in more provision on television is not as top-of-mind for respondents
 - When asked about their main source for different media interests, across the UK, some 40% of people say their main source of local news are the main TV channels, rising to 43% of people in England. This drops to 23% of those in Scotland, 33% of those in Wales, and 35% of those in Northern Ireland. Instead, some 52% of people in Scotland nominate newspapers as their main source of local news, 36% of those in Wales, and 42% of those in Northern Ireland – compared to 28% of those in England (PSB Review survey)
- In terms of attitudes towards the provision of local information on websites, opinion is mixed: some 27% of people across the UK agree that “websites about my local area are a better way of finding out information for me than the main TV channels”, and 25% disagree. Agreement rises to 40% of those with broadband access (although 28% disagree). People in Scotland are more likely to agree (33%), whereas there were no significant differences for people in Wales or Northern Ireland compared to all people.
- While 27% represents a minority of people, it is of note that a comparison with 2003 results shows this has risen substantially since 2003, when the corresponding figure was 4%. (NB this rise will be linked to increased internet take-up over this period)

Indigenous languages

- Respondents were asked whether it is important “that some programmes shown in (Nation) are in (language)”
- 69% of people in Wales say it is important (of which 16% say it is very important), rising to 81% of those who say they can speak Welsh
- Some 53% of people in Scotland say it is important that some programmes are in Gaelic (base sizes of Gaelic speakers are too small to compare)
- 29% of people in Northern Ireland say that there should be Irish programmes (rising to 63% of Irish speakers), and 20% that there should be programmes in Ulster Scots (base sizes of Ulster Scots speakers are too small to compare)
- Indigenous language provision was not a focus in the deliberative workshops, although in each of the devolved nations its importance was mentioned by some participants, and in particular in Wales when talking about S4C

Nations and regions: Substitutability on other platforms

- In the deliberative workshops, participants discussed the substitution of content on the main channels with content on either the digital channels or the internet, in the context of cost saving.
- People tended to feel that neither the internet, nor the digital channels, were good substitutes for nations and regions provision. There remained a strong perceived need to broadcast nations and regions programming on the main channels, in large part due to its role in fostering a sense of inclusive identity
- When asked to agree or disagree with the statement “the main TV channels shouldn’t be made to show news programmes about my region/nation, there’s plenty of news on the internet about my region/nation” (PSB Review survey), 61% of people across the UK disagreed, and 13% agreed. Among internet users, levels of disagreement were in fact higher, 66% of daily internet users disagreed and only 13% agreed.
 - Disagreement levels were higher in the devolved nations – 67% in Wales, 74% in Northern Ireland and 75% in Scotland.
- Based on those who say they use the internet daily, some 49% of respondents say their *main* source of nations and regions news is from TV on the main channels, and 5% from the internet (PSB Review survey). This figure rises when asked which source they *ever* use; some 67% of daily internet users say TV on the main channels, and 14% the internet.

Attitudes about nations and regions provision

Attitudes towards nations and regions provision % total agree	PSB 2003	% total agree*
TV is an important source of news about my region/nation**	84%	69
It is important for ITV1 as well as BBC to show news programmes about my region/nation	83%	75
It is important to show programmes that take place in different parts of the UK/nation	77%	n.a.
News about my region/nation is of general high standard	67%	55
Broadcasters shouldn't be made to show set amounts of programmes about my region/nation	34%	32% disagree 26
Other than the news and current affairs, programmes about my region/nation are of no interest to me	22%	62% disagree 16
The main TV channels shouldn't be made to show news programmes about my region/nation, there's plenty of news on the internet about my region/nation	13%	61% disagree, rises to 66% among people with broadband n.a.
Attitudes towards local provision % total agree		
I would like the main TV channels to show programmes that give me news and information about my local area	78%	n.a.
Websites about my local area are a better way of finding out information for me than the main TV channels**	27%	25% disagree, 25% don't know*** 4

Source PSB Review survey Q39-Q41: 2,260 interviews with UK adults aged 16+, October - December 2007

* Source: PSB Review survey 2003 – please interpret any changes over time with caution – see Appendix for details

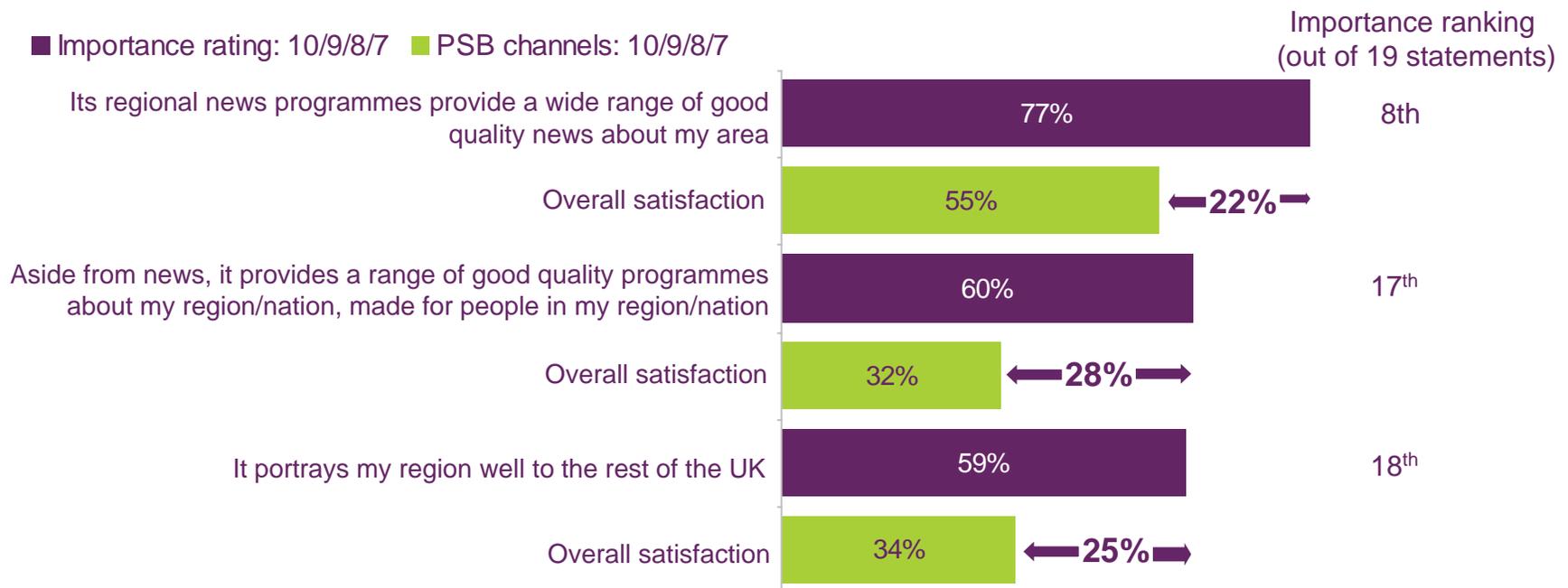
**Question wording varied slightly in 2003. Interpret with caution

*** Among people with broadband results are 40% agree and 28% disagree

Attitude statements by nation and region

Percentage agreeing with statement (%)	All (2,260)	England (1,046)	Scotland (411)	Wales (397)	N. Ireland (406)	Tyne Tees (112)	Granada (150)	Yorkshire (132)	Central (229)	Anglia* (121)	London (204)	Meridian* (167)	W. Country (89)
Television is an important source of news about my region/nation	84	82	90	91	95	92	87	88	82	86	71	83	86
It is important to show programmes that take place in different parts of the UK/nation	77	75	89	87	85	86	75	81	70	81	65	83	87
It is important for ITV1 as well as BBC to show news programmes about my region/nation	83	82	94	91	93	90	83	87	84	91	65	83	91
News about my region/nation is of general high standard	67	66	67	79	81	78	79	85	64	66	44	68	75
Broadcasters shouldn't be made to show set amounts of programmes about my region/nation	34	34	37	36	32	31	33	25	37	36	27	40	52
Other than the news and current affairs, programmes about my region/nation are of no interest to me	22	23	9	13	17	15	26	18	21	19	35	17	17
The main TV channels shouldn't be made to show news programmes about my region/nation, there's plenty of news on the internet about my region/nation	13	14	11	14	9	11	28	5	15	10	19	5	5
I would like the main TV channels to show programmes that give me news and information about my local area	78	79	77	80	81	90	83	88	76	77	70	82	81
Websites about my local area are a better way of finding out information for me than the main TV channels	27	26	33	30	28	16	29	16	30	30	32	19	21

PSB Purposes: Importance vs Satisfaction - England



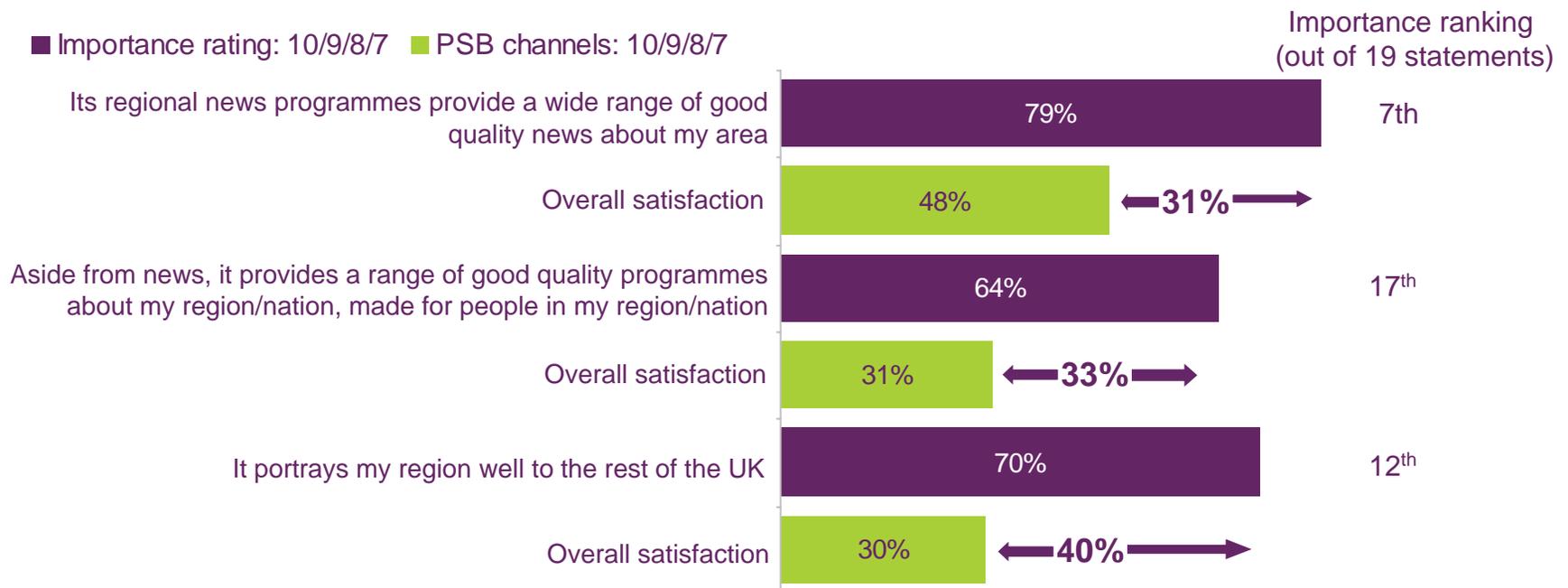
- Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”

- Extent to which the characteristic applies to the channels together, where 10 means ‘applies completely’ and 1 means ‘does not apply at all’

Source: PSB Tracker 2007 Base = All respondents. All Channels Combined = 7157; Importance = 5357

Amalgamated data: Jan 07, April 07, July 07, Oct 07.

PSB Purposes: Importance vs Satisfaction - Scotland

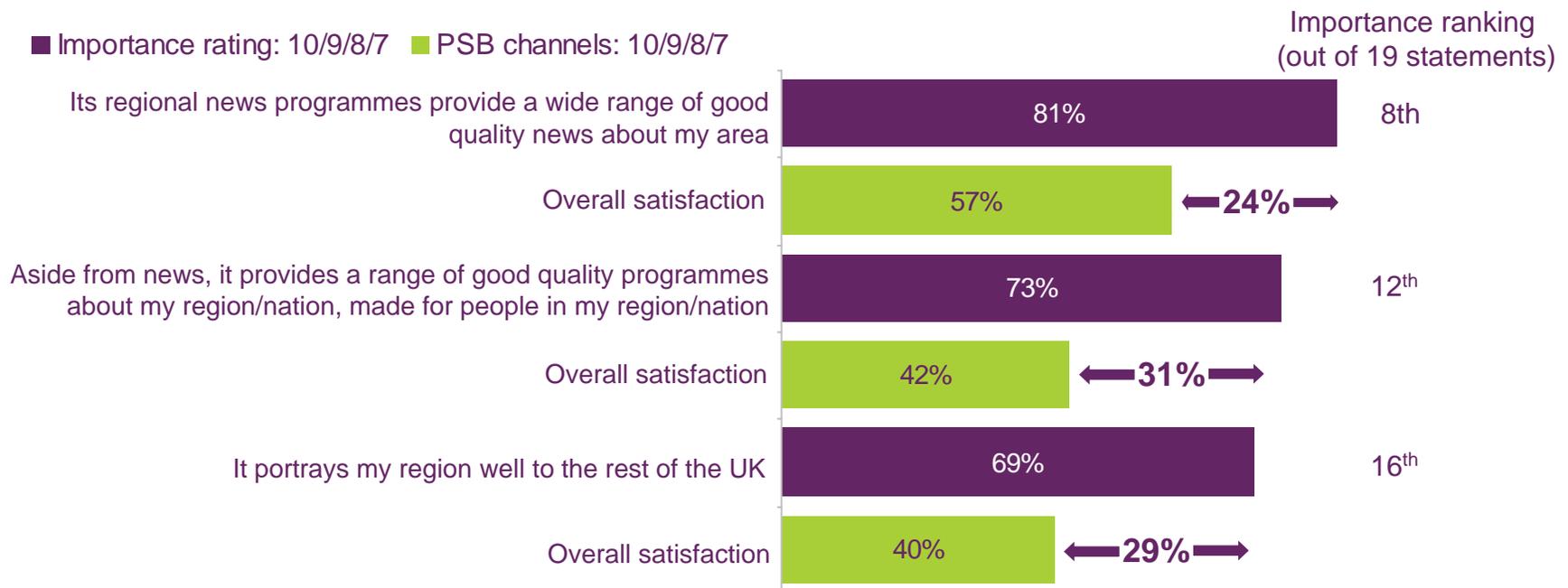


- Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”
- Extent to which the characteristic applies to the channels together, where 10 means ‘applies completely’ and 1 means ‘does not apply at all’

Source: PSB Tracker 2007 Base = All respondents. All Channels Combined = 7157; Importance = 5357

Amalgamated data: Jan 07, April 07, July 07, Oct 07.

PSB Purposes: Importance vs Satisfaction - Wales



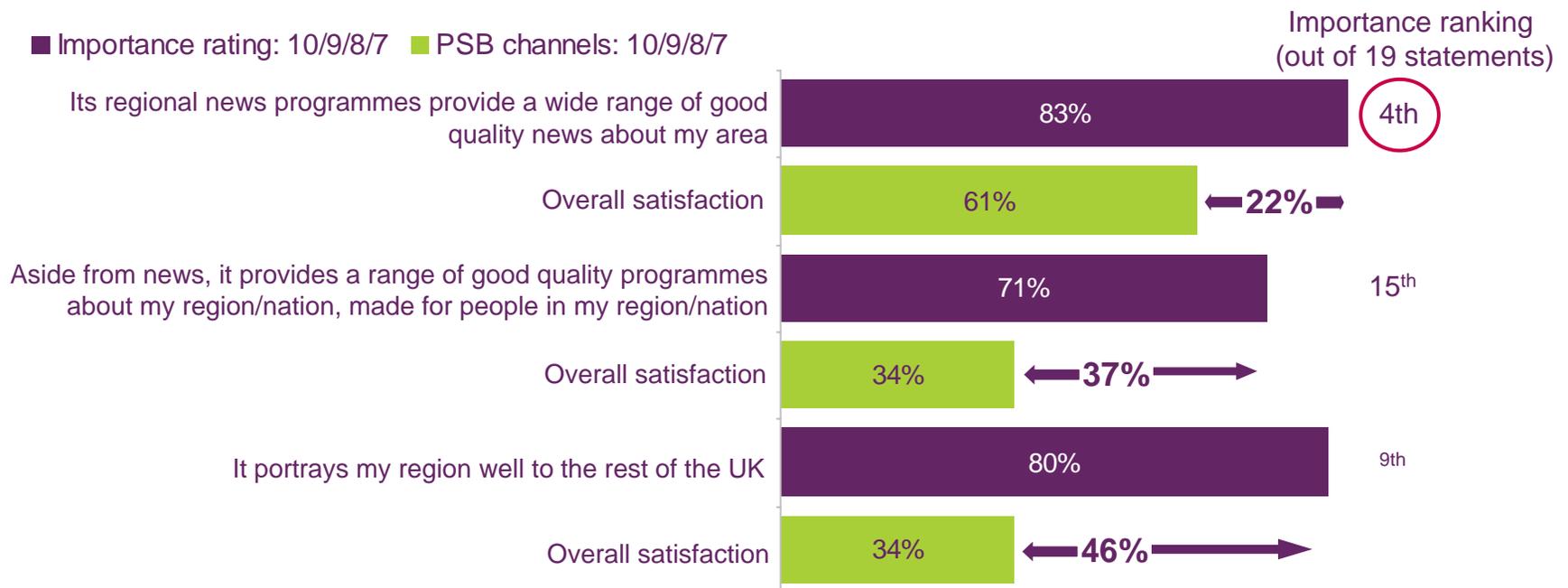
- Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”

- Extent to which the characteristic applies to the channels together, where 10 means ‘applies completely’ and 1 means ‘does not apply at all’

Source: PSB Tracker 2007 Base = All respondents. All Channels Combined = 7157; Importance = 5357

Amalgamated data: Jan 07, April 07, July 07, Oct 07.

PSB Purposes: Importance vs Satisfaction – Northern Ireland



- Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”

- Extent to which the characteristic applies to the channels together, where 10 means ‘applies completely’ and 1 means ‘does not apply at all’

Source: PSB Tracker 2007 Base = All respondents. All Channels Combined = 7157; Importance = 5357

Amalgamated data: Jan 07, April 07, July 07, Oct 07.

Importance of indigenous language programming

■ Agree strongly
 ■ Agree
 ■ Neither/Nor
 ■ Disagree
 ■ Disagree strongly
 ■ No opinion
 Speakers % total agree



Source Q40: 408 Northern Irish adults aged 16+, October - December 2007



Source Q40: 412 Scottish adults aged 16+, October - December 2007



Source Q40: 395 Welsh adults aged 16+, October - December 2007

Source: PSB Review survey. Note *base size too small to report on for speakers of Ulster Scots and Gaelic

Young people

Young people 16-24

TV viewing: behaviour and attitudes

- Younger people spend less time watching tv compared to all 16+ and time spent viewing has decreased more among 16-24s since 2003 (BARB)
- The five main channels have experienced the largest declines among younger people. There has been an increase in viewing to the portfolio channels and to other digital channels (BARB)
- Support for the portfolio channels is strongest among 16-24s, with 68% claiming 'it is important that the main channels provide additional digital channels' compared to 53% of 16+ (PSB Review survey, 2007)
- This also applies to support for broadcaster websites, with 70% of 16-24s claiming that 'it is important that the main tv broadcasters provide websites which provide additional content' compared to 53% of 16+ (PSB Review survey 2007)
- Although less likely to rate elements of PSB as important compared to all people, the importance of provision of PSB purposes and characteristics on the main tv channels remains high among 16-24s (PSB Tracker, 2007), particularly for trust and engaging content. Less importance attached to informal learning elements of PSB (Purpose 2 statements) and UK originations, compared to all 16+
- Younger people are somewhat less likely to think provision of News (89% v 93% for 16+), current affairs (76% v 85%), national/regional current affairs (73% v 83%) and serious factual (76% v 82%) is important on the main channels, compared to all people 16+, but scores are still high. They are more likely to think UK comedies were important (82% v 72%) and programming that includes different EMGs (PSB Review survey)
- Overall satisfaction with tv provision is significantly higher among 16-24s (85% satisfied) compared to 79% for all people, with satisfaction decreasing with age – these results could possibly be a result of more selective viewing among 16-24s who watch less TV

Young people 16-24

Internet behaviour

- According to results from Ofcom's Media Literacy Audit, there has been a dramatic increase in the amount of time young people say they spend online at home since 2005, from 6.7 hours to 10.0 hours (Media Literacy Audit 2005 and 2007), although young people still spend more time watching tv than online
- The drop in TV viewing (according to BARB) is only one possible part of providing an explanation for the increased time spent online and Ofcom has only a limited amount of research that investigates if there is causal relationship between the decline in viewing and increase in internet usage - 20% of 16-24s named using the internet more as their main reason for watching less tv than 4 or 5 years ago, although 40% said they had less time to watch tv (PSB Review survey 2007). Media stacking could also help explain the increased time spent online (one possible consequence of media stacking is decreased attention given to each medium involved.)

Media usage – comparison of TV and internet

- TV is a key source of entertainment and all types of news for 16-24s (PSB Review survey, 2007)
- However, among 16-24 broadband users the internet is the main source for discovering new things (63%), personal interests (41%), knowledge about topics (34%), and finding out about people with different (34%) and similar interests (57%) (PSB Review survey, 2007)
- Young people's main reasons for watching tv are for relaxation/passing the time and fun (78%) as it is for all 16+ (70%). However, keeping up to date with the news is given as a main reason among only 4% of 16-24s compared to 14% for all adults (Media Literacy Audit, 2007)
- Young people's main reasons for going online are similar to all adults, with finding out or learning ranking top (47% of 16+ vs 36% of 16-24s.) A higher proportion of young people claim their main reason for going online is for contacting people compared to all 16+ (23% for all 16+ vs 28% of 16-24s) and for entertainment - one fifth (21%) of all 16+ compared to 26% for 16-24s

Young people 16-24

Media attitudes – comparison of TV and internet

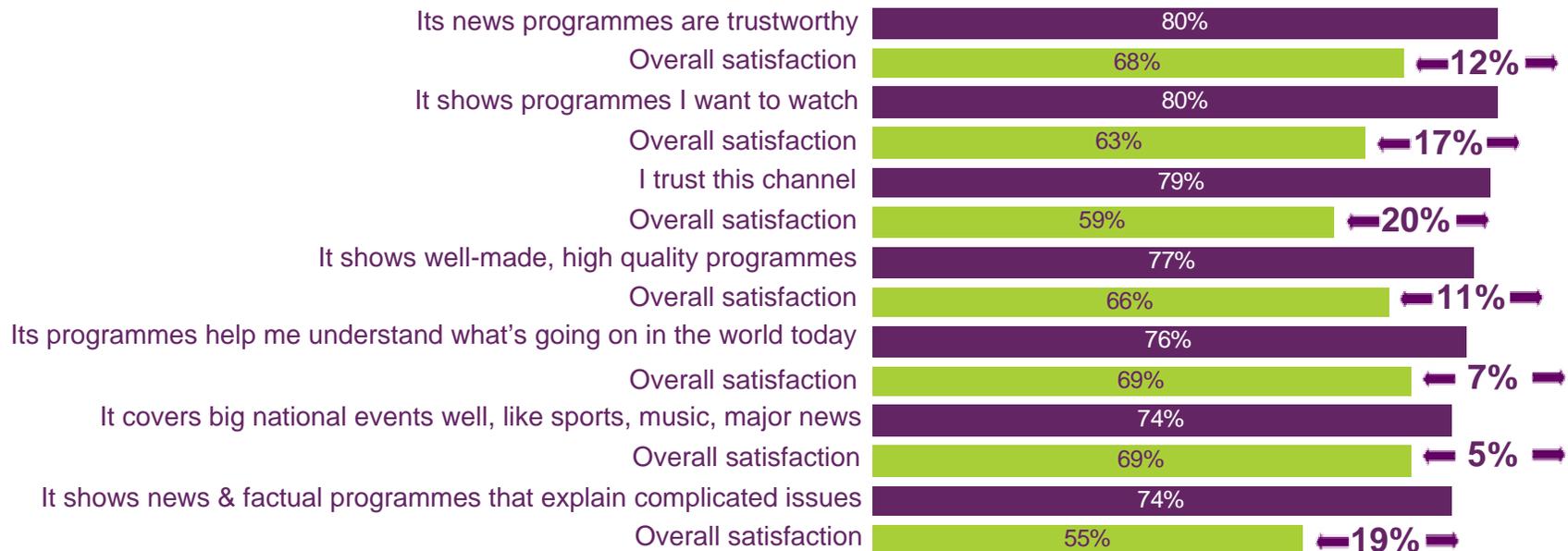
- Although just under half of 16-24s would find it hardest to live without tv (49%), among younger broadband users the internet takes the lead with 46% saying they would miss it compared to 40% for TV. When considering this finding, it is important to bear in mind that the internet is a multi-functional platform , providing a range of services including audio visual content that is available on tv. With increased convergence, this blunt research measure may need refining. (PSB Review survey)
- TV has a clear edge on some roles, for example as a normative tool, with 71% of all 16-24s agreeing it is ‘very influential in shaping public opinion’ compared to 57% for internet according to 16-24s with broadband at home. TV also has the edge in ‘sometimes changing the way I think about things’ (62% all 16-24s) compared to just over half of broadband users (55%) for the internet
- The internet has the edge on some roles, and in places young people’s attitudes differ to 16+
 - Personal learning (94% for internet among broadband users v 82% for TV among all 16-24) - similar pattern to all aged 16+
 - Having an important role to play in making people interested in different subjects (78% for internet among 16-24 broadband users compared to 68% for TV all 16-24s). This differs to those aged 16+ where the internet is slightly lower than TV: 74% for internet among broadband users vs 78% for TV all 16+)
 - Having an important social role to play - 85% for internet among broadband users vs 79% for TV all 16-24s). This differs to all 16+ where the internet is lower than tv: 75% for internet among broadband users vs 79% for TV all 16+)

Also see Role of internet section

PSB Purposes: Importance vs Satisfaction 16-24 year olds

- Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”
- Extent to which the characteristic applies to the channels together, where 10 means ‘applies completely’ and 1 means ‘does not apply at all’

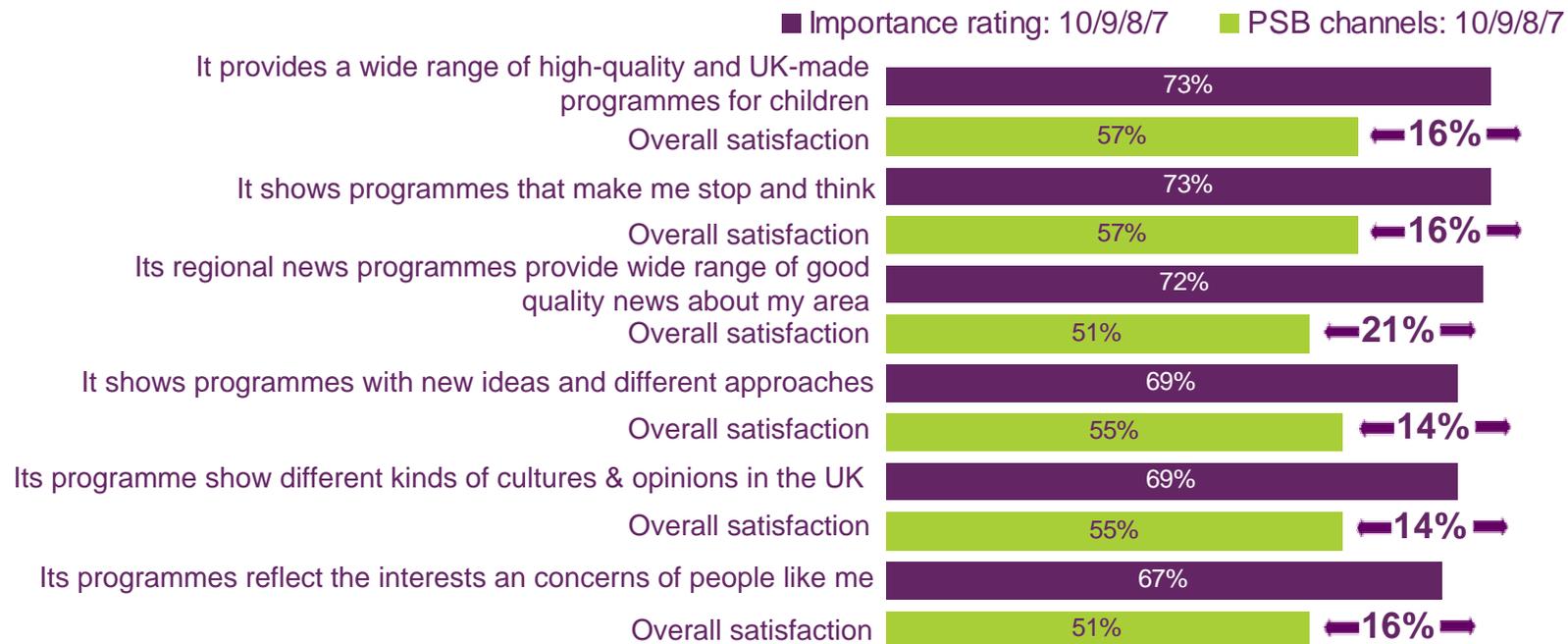
■ Importance rating: 10/9/8/7 ■ PSB channels: 10/9/8/7



Source: PSB Tracker 2007: Base = All respondents. All Channels Combined = 682; Importance = 511; amalgamated data: Jan 07, April 07, July 07, Oct 07.

PSB Purposes: Importance vs Satisfaction 16-24 year olds

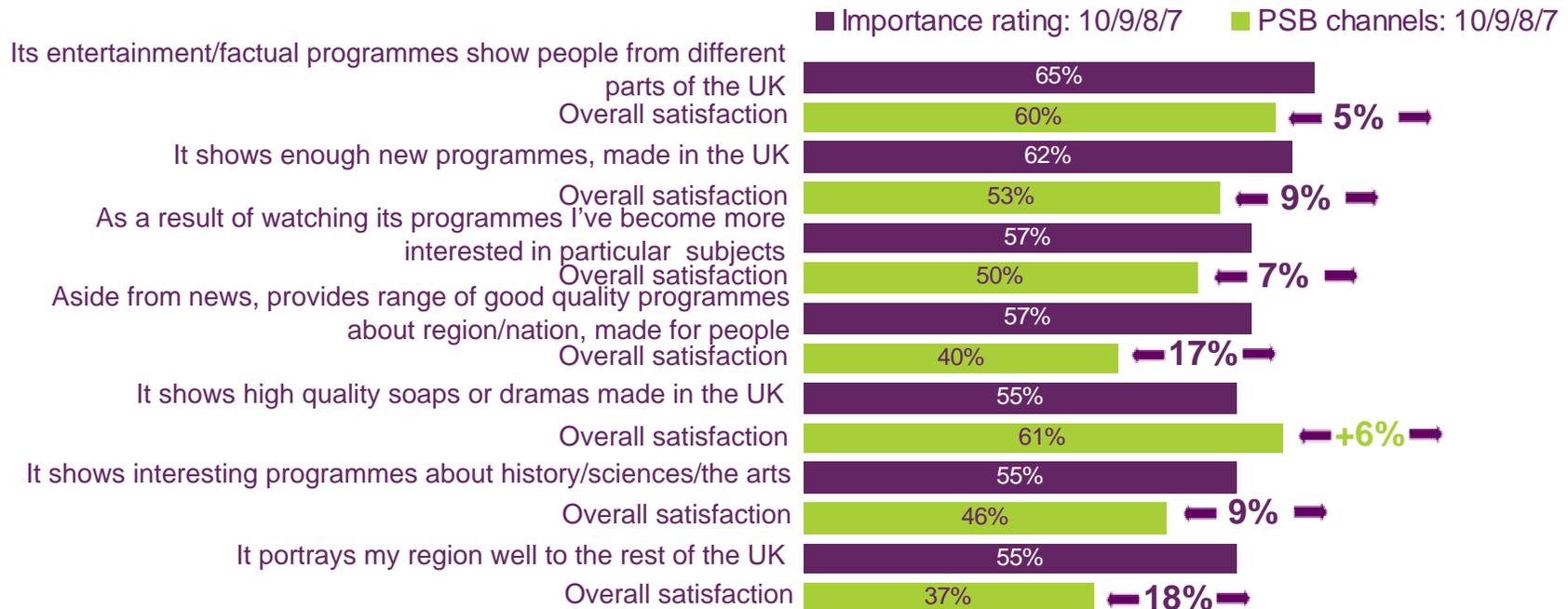
- Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”
- Extent to which the characteristic applies to the channels together, where 10 means ‘applies completely’ and 1 means ‘does not apply at all’



Source: PSB Tracker 2007: Base = All respondents. All Channels Combined = 682; Importance = 511; amalgamated data: Jan 07, April 07, July 07, Oct 07.

PSB Purposes: Importance vs Satisfaction 16-24 year olds

- Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”
- Extent to which the characteristic applies to the channels together, where 10 means ‘applies completely’ and 1 means ‘does not apply at all’



Source: PSB Tracker 2007: Base = All respondents. All Channels Combined = 682; Importance = 511; amalgamated data: Jan 07, April 07, July 07, Oct 07.

Children

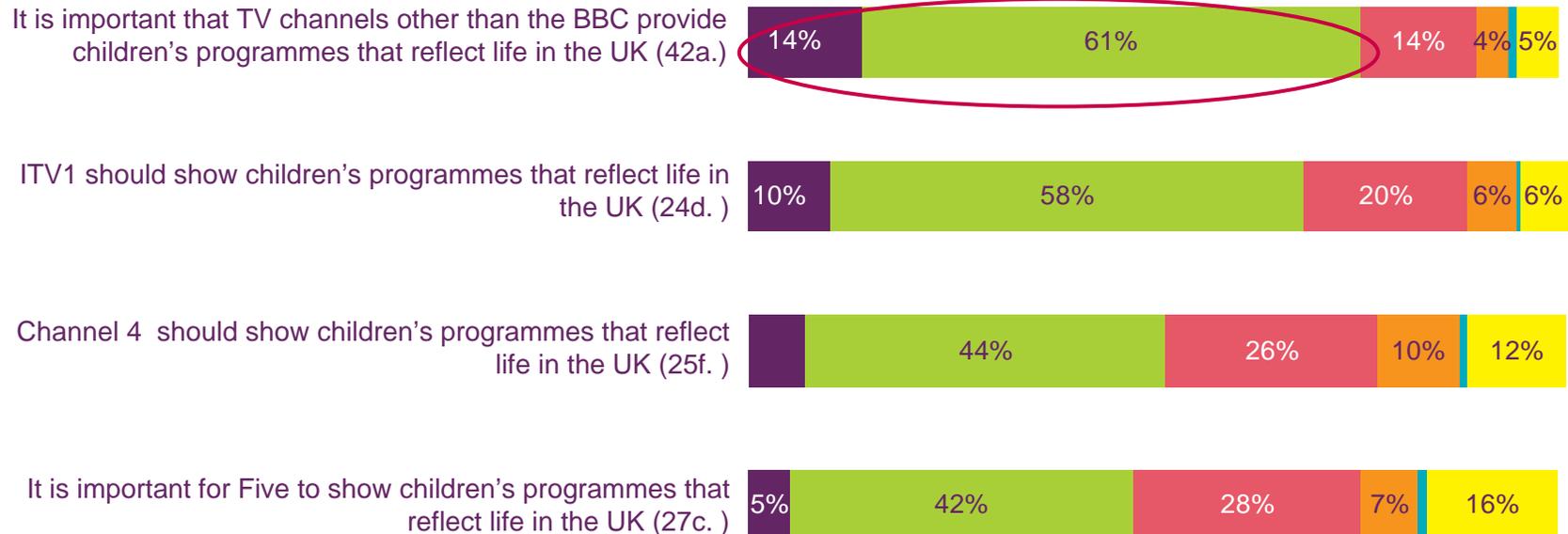
Summary of Findings for Children's Programming

Finding	The Future of Children's Television Programming (2007)	PSB Ipsos Mori deliberative and quantitative studies
PSB programming for children is highly valued and high quality is key	✓	✓
UK-originated programming valued as it reflects and promotes UK cultures and lifestyles and has a different tone to imported programming	✓ <i>Country of origin was seen to be particularly important for Drama and Factual programming</i>	✓
Plurality in PSB programming provision deemed important to cater for different ages, genders, tastes and interests	✓	✓ <i>75% of respondents claimed 'it is important for channels other than the BBC to provide children's programmes that reflect life in the UK' (rises to 80% among parents, Q42a)</i>
Satisfaction with current PSB provision	<i>Gaps in current provision identified as programming for older children, UK Drama and UK Factual</i>	n.a.
Future provision on portfolio digital channels	✓ <i>CBBC, and in particular CBeebies valued in multichannel homes. Strong support for a new PSB children's channel to fill perceived gaps in current provision (older children, drama, factual)</i>	✓ <i>Half of participants (mainly parents) thought provision could move to digital channels if necessary – as they provide safe, dedicated destinations that are available any time</i>

People want children's programmes provided by other TV channels, in addition to the BBC

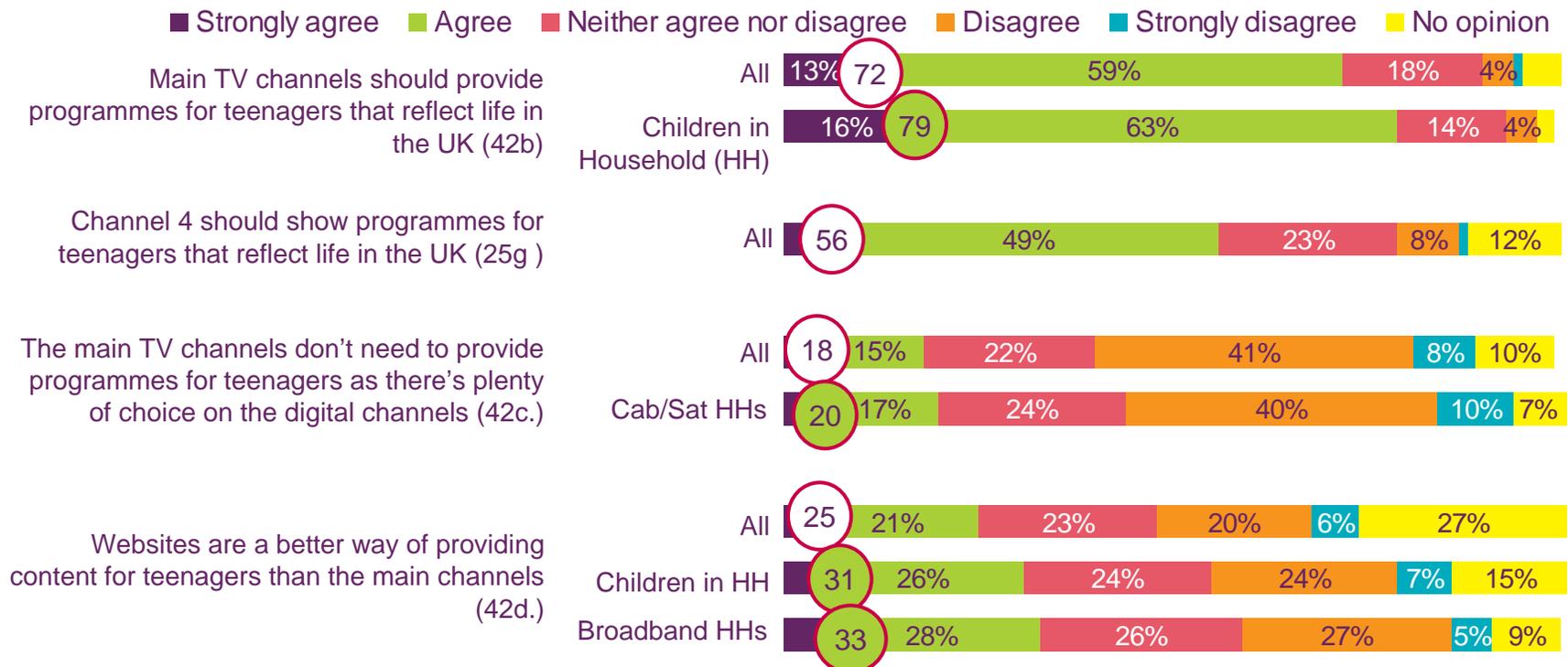
■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree
 ■ No opinion

Agreement rises significantly to 80% among parents



Source PSB Review survey Q24, Q25, Q27, Q42: 2,260 interviews with UK adults aged 16+, October - December 2007

Almost three quarters of people feel there should be provision for teenagers on the main channels



Source PSB Review survey Q25, Q42: 2,260 interviews with UK adults aged 16+, October - December 2007. Significant differences versus all 16+ indicated in green circles

People from ethnic minority groups (EMGs)

People from different EMGs

TV viewing: attitudes and behaviour

- In terms of satisfaction with TV provision as a whole, there is no significant difference on levels of satisfaction between EMGs (81%) and all 16+ (79%). However, EMGs are less likely to be satisfied with the main five channels (although 69% still say they are v 74% of all 16+) and among those with multichannel they are more likely to be satisfied with 'other digital channels' (PSB Review survey)
- EMGs are more likely to value TV as a tool for societal cohesion, (82% thought 'TV should help to promote understanding of different religions, cultures and lifestyles' compared to 75% of all 16+, PSB Review survey)
- Also people from different EMGs are more likely to think that TV has an important role to play in society (87% compared to 79% for all 16+, PSB Review survey)
- EMGs are more likely to find it hard to live without digital channels (24% agree v 18% all 16+) and indicatively are more likely to miss the internet (23% v 19% of all 16+) (PSB Review survey)
- Although TV on the main channels is more popular than digital channels as a main source for UK and world news for people from EMGs, they are more likely to name the digital channels as their main source for these media needs, compared to all 16+. EMGs are also more likely to name 'TV on the digital channels' as their main source of entertainment; digital channels (32%) are as popular as the main tv channels (35%) for entertainment. They are also more likely than all 16+ to name the digital channels for Sports news (34%) and finding out about people who are different to you (20%) (PSB Review survey)
- Compared to all 16+, the internet is a more popular source for finding out about people with similar lifestyles/interests (35% v 26% of all 16+), discovering new things (37% v 29%), finding out about people with different lifestyles/interests (18% v 13% for all 16+) and news about the world (12% v 6%) (PSB Review survey)
- EMGs attitudes towards the internet are broadly similar to all 16+ with some differences; they are more likely to think it is important that the internet promotes understanding of different cultures and religious (59% v 50% for all 16+), that the role of the internet is to provide entertainment (19% v 13%) and that the internet shapes public opinion (50% v 41%) (PSB Review survey)

People from different EMGs

PSB Tracker: Importance and satisfaction

- The majority of people from ethnic minority groups thought that each of the purposes and characteristics statements was important. That said, people from ethnic minority groups are less likely than the UK overall to rate many elements of PSB as important - in particular trust in channel (73% v 85%) and trustworthiness of news (80% v 87%)
- They are more likely to rate reflecting different kinds of cultures within the UK (80% v 69% of all 16+); reflecting interests and concerns of people like me as important (76% v 69%); and indicatively more likely to rate children's programmes as important
- Levels of satisfaction are generally similar to the UK overall figures, except for some Purpose 1 elements – they are less likely to be satisfied for 'trustworthiness of news' (57% v 65%); 'help understanding of the world' (60% v 68%); as well as Purpose 3 coverage of big national events (58% v 65%) and regional/national news (47% v 54%)
- The biggest gaps between importance and satisfaction are for reflecting different kinds of cultures (80% v 48% - 32pp gap) and reflecting interests and concerns of people like me (76% v 46% - 30pp gap), regional news (77% v 47% - 30pp gap), UK children's programmes (83% v 50% - 33pp gap), other regional programmes (63% v 30% = 33pp gap), programmes that make me stop and think (78% v 47% = 31pp gap)
- In terms of TV provision as a whole, EMGs are less likely to be satisfied with the main five channels (although 69% still say they are) and more likely to be satisfied with digital commercial channels (76%).

PSB programme genres on the main channels (PSB Review survey)

- Less likely to think it is important for the main channels to provide certain programme genres, although scores are still high; UK news (88% v 93% for all 16+), national/regional news (80% v 88%), UK drama (67% v 75%) and UK comedies (65% v 72%)
- However, there are higher levels of agreement compared to all 16+ for programmes that appeal to different cultural tastes (71% v 64%) and programmes that include different EMGs (72% v 59%) and religious programmes (58% v 49%)

Future provision of PSB

Wide availability

TV

- Over three quarters (78%) of people agree that '*it is important that TV is available to everyone*' (PSB Review survey). Agreement rises with age to 83% among 65+ years, but remains high among younger people (16-24 years, 75%)
- In the deliberative research participants stated that the licence fee is paid by everyone in UK with a TV, and that given society is comprised of different audiences and that everyone has made a financial investment - then the broadcasters have a responsibility to ensure all groups needs are met and interests reflected and that everyone has access
- When discussing whether the commercial digital channels could be used as a means of delivering 'official' PSB content in the future, participants were reluctant to pay a subscription for PSB content which they felt strongly should be available to everyone and this could limit access. Given the social importance placed on PSB, many believed that restricting access to those that could afford to pay would be against the ethos of PSB. There were also concerns that the commercial imperatives of these channels may be at odds with PSB's aims and it may be hard to find PSB content within the schedule, as well as raising issues about trust

Internet

- Support for wide availability of the internet is lower than for TV (57% for internet compared to 78% for TV). However, this is likely to be influenced by platform access
 - Among people with broadband, this rises to 72%
 - Agreement is highest among younger people and declines with age. Three quarters (76%) of 16-24s agree, compared to one third (34%) among 65+
 - Among younger people support for wide availability of internet and of TV are the same (76% for internet and 75% for TV)
- Participants in the deliberative research felt that the internet had to be universally available in order for it to be legitimate to transfer PSB content across from TV. Even then, there were reservations about transferring content. Participants believed there was a risk that by providing PSB content on the internet certain groups in society such as elderly, those with long term health issues or financially vulnerable would/could be excluded. Even if access were provided for all, there was also the issues of skills/confidence, navigation, findability, as well as suitability of the medium for the content, the different experiences offered by TV (social, family time) vs internet (solitary) and the underlying belief that certain types of content, such as News, had to be provided on the main TV channels.

Attitudes towards platform substitution (1)

- When asked which programme types need to be shown on the main channels in the future (rather than move to digital channels or the internet), most respondents wanted most programme genres to stay on the main TV channels (Q43, PSB Review survey). News emerged as by far the most supported genre, with 92% saying that it should remain on the main channels. Other genres with high support include news and information about your region/nation (74%), current affairs (74%) and entertainment (72%). These are followed about news about your local area (70%), dramas that reflect life in the UK (66%) and children's programmes that reflect life in the UK (64%).
- Out of all the programme genres, some respondents were prepared to see sports (21%), arts (19%) or religious programmes (23%) transferred to either the portfolio or commercial digital channels
- Those with access to cable/satellite or broadband were readier to accept programme genres moving off the main channels, but, even so, most of these respondents wanted most genres to stay on main TV channels
 - Among people with cabsat or broadband, support for movement to portfolio channels was higher than for movement to other digital channels or the internet
 - No significant differences for people with Freeview vs. all people

Attitudes towards platform substitution (2)

- When asked in the PSB Review survey survey, most people do not see the digital channels or internet to be suitable replacements for **news** on the main channels, even among people with cab/sat
 - Less than one quarter (24%) agreed that now 'there are dedicated digital news channels, there is less of a need for news bulletins on the main TV channels' (Q37b)
 - Less than one fifth (19%) agreed the internet was a better source of news than the main TV channels (Q37c). However, among people with broadband access, views were more mixed , with 26% agreeing and 40% disagreeing; this also applied to 16-24s (33% agreeing and 24% disagreeing)
- Most people think the digital channels cannot substitute **current affairs** on the main TV channels, even among people with cab/sat
 - Less than one quarter (22%) agreed the 'main TV channels shouldn't be made to show current affairs programmes, there's plenty of choice on the main TV channels' and 57% disagreed. Agreement rises slightly to 24% among people with cab/sat, although still 54% disagree
 - On balance people do not think 'the internet is a better source of current affairs than the main TV channels' (21% of people agreed). Among younger people and people with broadband views were mixed - a substantial minority (approx. one third) of 16-24 year olds and people with broadband think the internet *is* a better source, but then 24% of 16-24s disagree and 40% of people with broadband at home
- The internet is not seen by most to be a replacement for **regional/national news** on the main TV channels, with just 13% of people agreeing and 61% disagreeing that 'the main TV channels shouldn't be made to show news programmes about my region/nation, there's plenty of news on the internet about my region/nation' (Q39d).
 - Among people with broadband disagreement is higher (66%) and agreement low (14%)

Attitudes towards platform substitution (3)

- In the deliberative study, participants were asked, within the framework of cost saving, to decide which programme genres were essential to be provided on the main channels in the future and which could be moved to digital channels or the internet
- Issues were raised concerning navigation and findability in relation to shifting content to either digital channels or the internet (e.g. participants emphasised the need for clearly signposted digital channels which could be found among the vast number of digital channels available).
- Suggestions were made that the portfolio channels should develop distinct roles and functions, eg BBC Three for developing and nurturing comedy, this could also encourage associations with certain channels and help viewers find the types of programmes they wanted.
 - The portfolio channels were already perceived to be different to the main channels in that they were more experimental and catered for specific interests or audiences, rather than mass appeal
- There was concern that people's viewing habits may become narrowly focused if they turned to dedicated single genre channels, and the power of serendipity that the main channels possess, would be lost
- However, for a minority, particularly young people, shifting provision to the digital channels was seen as an improvement – due to perceptions of convenience, dedicated space and being unbound by traditional schedules, e.g. if they wanted to watch comedy, they knew where to go and content was readily available, any time
- Participants in the deliberative research believed that the internet could complement content provided on the main 5 channels, but there were concerns about it acting as a replacement. Reasons given included technological barriers, navigation, findability, trust, as well as the differing perceived functions of TV and internet (social vs. solo activity, serendipity, etc)
 - Out of all the programme types discussed, programmes for schools content was identified as a genre which could be moved to the internet. Reasons given were that learning was an interactive, solitary activity which lends itself more to the internet than to television. Access may not be a barrier as schools and universities generally provide internet access
 - Participants in the deliberative research felt that the internet had to be universally available in order for it to be legitimate to transfer PSB content across from TV

Attitudes towards platform substitution: deliberative workshops summary by genre

Participants were asked, within the framework of cost saving, to make hard choices about which programme genres were essential on the main channels in the future and which could be moved to digital channels or the internet. See previous two slides for context.

Programme genre	Provision on main channels/move to digital channels/ internet	Reasons
UK network news	'Crucial' to remain on main TV channels	<ul style="list-style-type: none"> • Important to maintain provision on main channels as they are likely to remain destination channels due to issues of navigation and trust • Continued plural provision deemed important in order to ensure commitment to impartiality; different tastes catered for; information pitched at different levels
Regional/national news	'Crucial' on main TV channels	<ul style="list-style-type: none"> • As for UK Network News
Current affairs	'Crucial' on main TV channels	<ul style="list-style-type: none"> • As for UK Network News
Serious factual, UK drama, UK comedy	Could be provided by a combination of main channels + digital channels	<ul style="list-style-type: none"> • Approx. one quarter of participants thought this content could move from the main channels as long as it was provided on the portfolio channels. This is linked to the perceived importance of each genre, e.g. News was seen to be important for all so needed to be on the main channels, whereas serious factual may not be a genre for everyone, so content could be provided on portfolio channels. Some thought BBC 3 had a role to play in developing and nurturing UK comedy
Children's	Could be provided by combination of main channels and digital channels	<ul style="list-style-type: none"> • Approx. half of participants (mostly parents) thought Children's was not essential on the main TV channels as long as there was plural provision on portfolio channels. Dedicated children's channels, such as CBeebies or CBBC, were seen to possess benefits over the main channels - safe dedicated destination, convenience/availability/not bound by traditional schedules • However, approx. half thought provision on main channels should be maintained as this was a mechanism to guarantee quality and diversity of provision
Schools /educational	Could be provided by internet	<ul style="list-style-type: none"> • Many participants thought that online content could replace television – as internet was interactive and so appropriate for learning; learning is a solitary activity – therefore internet more suitable medium; internet available in schools and universities, so access not deemed an issue
Religious programmes	Could be provided by digital channels and/or internet	<ul style="list-style-type: none"> • Could move to digital channels - main reason given due to low viewing figures on main channels. (Some participants with religious background mentioned currently use digital channels, e.g. GOD Channel)

Deliberative research suggests audiences are prepared to pay more to maintain current levels PSB

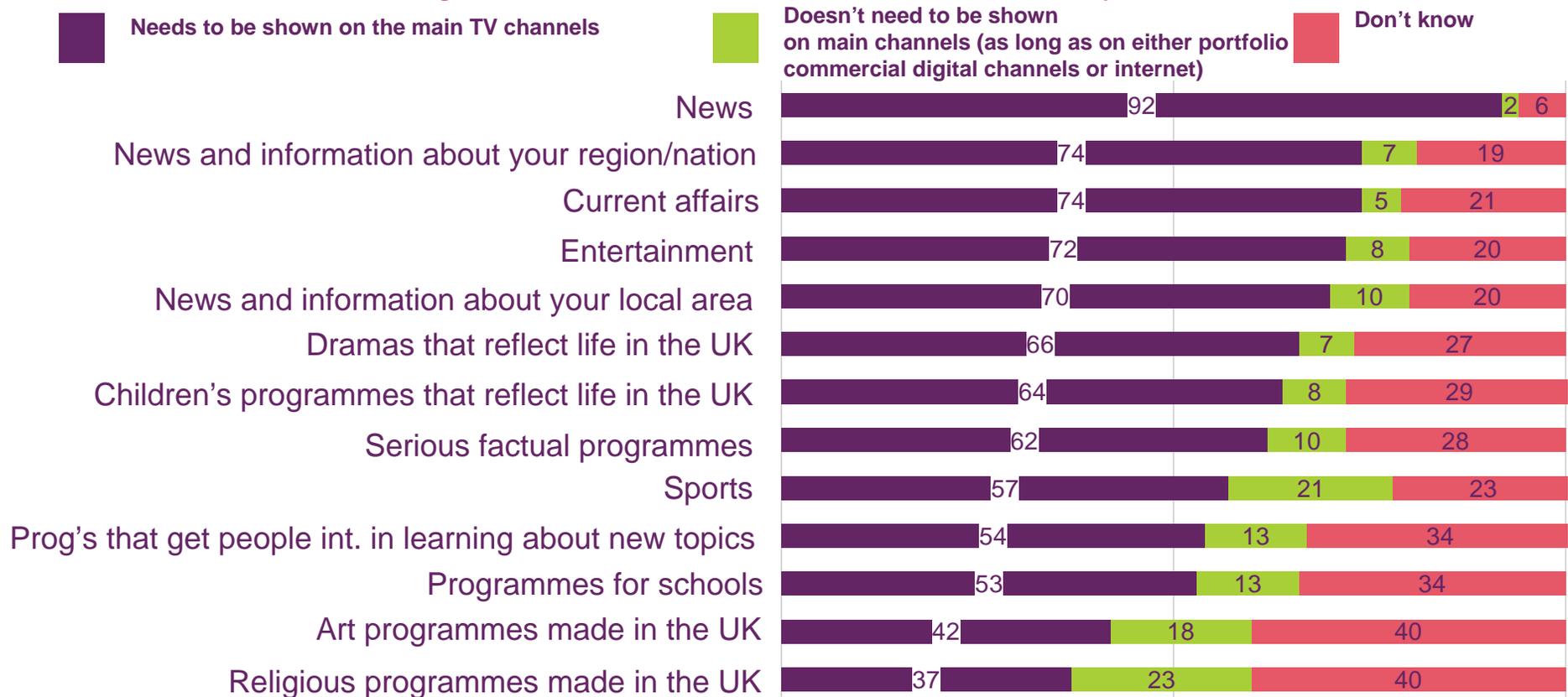
- Research into willingness to pay to maintain current provision was undertaken in a deliberative setting in 6 workshops across the UK (approx 180 participants).
- By means of an expert witness presentation from Ofcom, participants were informed about the current funding of PSB on the main 5 channels and the economic pressures on this model due to audience fragmentation. Most participants were unaware of the PSB obligations and funding of the commercial channels and were surprised to discover this as they tended to see them as purely commercial organisations
- Having informed participants of the current situation, they were then asked if they were willing to pay more to maintain current levels of PSB provision
- It was made clear to participants that there were no current proposals to increase the licence fee and that funding could come from a variety of sources. The objective was to gauge whether we, as a society, were prepared to pay more to maintain current PSB provision
- Faced with the choice of less PSB or increased costs for the same amount of PSB shown today, many participants *initially* opted to reduce the level of PSB to ensure no price rise
 - This was a knee-jerk reaction to the idea of paying more and should be considered in the light of contextual data (e.g. general perception that cost of living increasing in UK, are broadcasters making most of money available to them, e.g. presenter salaries)
- After discussion, participants fell into three main groups:
 - The majority who were willing to pay more for the same amount of PSB
 - Those not willing to pay more but believed they would get used to a price increase
 - A small minority who were not prepared to pay more – less likely to value PSB in general

Deliberative research suggests audiences are prepared to pay more to maintain PSB on commercial channels

- The reasons why the majority of participants were prepared to pay more were:
 - Provision of PSB was deemed important, could play an increasingly important role in a ‘fragmented’ society
 - Desire to secure plurality for key programme genres was key (e.g. to keep a check on BBC, increased competition, maintain quality, choice)
 - At the end of the workshop, having been informed of the economics, 7 in 10 participants thought that at least one of the main TV channels, in addition to the BBC, should show PSB
 - Given these perceived benefits, many participants saw the increase in cost as worth it
- The priorities centred on the following key programme types, which were also priorities for plurality
 - UK network news
 - National / regional news
 - Current affairs
 - High quality UK content (applied to a range of programme genres, including Drama, Comedy, Children’s)
- These discussions also considered the hard choice of reducing content on either the BBC or on ITV1, Channel 4 or Five, in order that there was no need for an increase in costs for providing PSB. Opinion was mixed. In the initial workshops, for many, the BBC was considered to be the prime provider of PSB and many thought it an international, respected brand and it was important to preserve its role in the provision of PSB as a matter of priority. In the reconvened workshop many participants thought the overriding priority was to maintain plurality for what were considered to be the key programme types was believed to be key and there were concerns that were the BBC the main – or only – provider of certain types of PSB programmes then the quality of them might decline due to a lack of competition. Overall, the main conclusion for the majority was that these choices were extremely hard and that people chose to see an increase in costs to maintain current levels of provision. It was generally thought that reducing the amount of PSB could lead to some serious consequences for the future of television generally. , Attitudes towards this are shown in the voting results from the end of the 6 workshops. While three in ten participants agreed that ‘as long as the BBC shows PSB programmes, the other main TV channels should be allowed to show what they like’, seven in ten thought that *at least one of the main TV channels, in addition to the BBC, should show PSB programmes (72%)*.

Respondents expressed a desire to see most genres stay on the main TV channels

In the future, it may be the case that the main TV channels may not be able to provide all of the types of content we have been talking about. Which of these statements is closest to your views:



Source PSB Review survey: Q43: 2,260 interviews with UK adults aged 16+, October - December 2007

Trends over time

Changes in use of platforms

- Although viewing to digital channels has increased, and some commercial digital channels are seen to possess some PSB purposes and characteristics, there remains high levels of importance placed on the PSB purposes and characteristics delivered by the main 5 channels among all age groups. In general, digital channels are seen as a complement to, not replacement for the main 5 channels
- There has been a significant increase in the amount of time spent online, particularly among 16-24s from 2005 to 2007 (Media Literacy Audit).
- The use of the internet as a source for various types of media content has increased, also particularly among 16-24s. For example, for the areas of personal interest (41%) and discovering new things (63%), the internet is a main source for a sizeable amount of 16-24s with broadband (PSB Review survey)
 - For news, one fifth of all people 16+ (19%) now say the internet is a better source of news than the main channels, compared with 5% in 2003. At the same time, agreement that the main channels should each have at least one bulletin during peak-time has also increased and TV remains the main source for all types of news for most people.
 - For regions/nations programmes, again, there is somewhat higher demand for local and national/regional provision than in 2003. While some 44% of respondents said that the main TV channels were their main source for local news, 27% of respondents said that the Internet is a better source of local information – up from 4% in 2003
 - There is also growth in belief in the need and importance of regional/national programming compared to 2003. TV is seen as the best source for such content, not least because of the current mis-match of the main audiences on TV for nations/regions programming and those with access to the internet
- For the UK population as a whole, the use of the internet as a main source for news has increased from 2003 figures – for example it is now on a par with radio (6%) as the main source for news about the world, although it still remains a lot lower compared to television.
- More notably, internet has increased particularly as a main source for topics “about your personal interest” (1% to 21%); and knowledge about topics (from 3% to 16%)

Comparisons with 2003 data need to be treated with caution – see appendix

The purposes of TV

- TV is still about **both** entertainment **and** the societal good – and this view remains consistent across different demographics, as it was in 2003
- News and information, and programme quality, remain the key important elements of PSB.
- Issues around diversity remain of somewhat less importance, although still reasonably high and questions remain over the best way of ensuring this
- Many attitudes towards the role of TV have either stayed at similar levels to 2003, or increased. In particular, TV's role in promoting societal cohesion is rated more highly than in 2003, as is its personal use-value in learning. Younger people also rate various elements of TV as a societal good highly, although they are less minded to rate TV as a learning tool, or for its role in shaping public opinion about politics when compared to 2003
- Comparison with 2003 results suggests there has been an increase in people agreeing that TV's main role is the provision of entertainment, although in 2007 this still remains at below one third of people (27%) - indicating perhaps TV's dual role of entertainment and learning for viewers – although it is interesting to note that the change in agreement is largely driven by over 65s not younger viewers.
- Increased take-up of the internet and digital platforms has resulted in a shift in consumption habits, but a strong underlying belief in the importance/desirability of five main channels remains across all groups

Comparisons with 2003 data need to be treated with caution – see appendix

Trends over time (3)

PSB importance and satisfaction

- While there are significant differences between levels of importance and satisfaction with various elements of PSB as seen on previous slides, our available data shows little recent difference in terms of trends over time
- Over the last year, the perceived importance of various aspects of PSB have not changed (PSB Tracker data comparing the last 5 waves since the start of 2007)
- Levels of satisfaction among regular viewers of channels show a largely positive story: Since 2005 they have mainly stayed the same or increased, for example:
 - Purpose 2: BBC One, BBC Four and Five increased significantly; Channel 4 decreased
 - Purpose 4: satisfaction higher across a number of channels
 - Original: BBC One significantly higher, ITV1 also higher
 - Engaging: some signs of decrease for ITV1 and Channel 4
 - Innovation: no particular change except for increase in BBC Three and BBC Four
- *(NB increases to Five, BBC Three and BBC Four in part explained by changes in profile of regular viewers over time; PSB Tracker data)*
- Comparing 2003* and 2007 data suggests levels of overall satisfaction across TV as a whole (including non-PSBs) has increased. Just under four fifths of people are satisfied with TV provision (PSB Review survey 2007). 16-24s and cabsat viewers are more satisfied than other age-groups/platforms

Comparison of 2003 and 2007 data needs to be treated with caution – see appendix

Nations and regions provision

- Levels of support for nations/regions provision have stayed at similar levels or increased since 2003 – there are no signs of the appetite for it abating

News

- News remains the key element of nations and regions provision. Satisfaction levels are fairly high (and comparison of 2003 and 2007 results suggest this has increased), although they tend to be somewhat lower for **England** and for **Scotland** compared to **Wales** and **Northern Ireland**

Plural supply of News

- There has also been an increase in the perceived importance of plurality in news supply on the main TV channels, with 83% of people thinking that this is important that ITV1 as well as BBC show news programmes about my region/nation (PSB Review survey 2007)
- Levels of support for plural supply of news have increased across all nations since 2003 according to our quantitative survey, and to a greater extent in the devolved nations.

Non-news

- The *principle* of dedicated programmes for each devolved nation is articulated strongly given the particularity of cultures and politics, but deliberative research indicates that satisfaction with “non-news” programming is lower than for network programmes, not least because of the overriding importance of programme quality for respondents. These views were also expressed in research conducted in 2004 for Phase 3 of the first PSB review

Network portrayal

- Dissatisfaction with the amount/type of network representation was apparent in our deliberative research from all the workshops except that in London, and was also strong in our research conducted in 2004

Comparisons with 2003 data need to be treated with caution – see appendix

Annex - methodologies

A variety of audience research sources (1)

PSB Quantitative survey (PSB Review survey)

- 2,260 face to face interviews between 17th October and 7th December 2007 by Ipsos Mori
- Survey data has been weighted according to region, work status and age to reflect the population profile nationally within the four nations – because of disproportionate stratifying to boost the number of interviews in the devolved nations, this reduces the effective base size to 1,310. Statistically significant differences between sub-groups versus all 16+ are calculated at 95% confidence level.
- **In 2003** Ofcom commissioned a quantitative survey of adults across the UK to establish views on public service broadcasting and its future. This survey took the form of a self-completion postal questionnaire, using the Quest panel and administered by Ipsos. Where possible, data from the 2007 survey are compared with 2003 data. However, all comparisons are made **with caution** as the two surveys were conducted with different methodologies and the overall structure of the questionnaire has changed. Statistically significant differences between 2003 and 2007 data are calculated at 99% confidence level.

PSB Qualitative research - deliberative workshops (PSB Review deliberative)

- Six day-long deliberative workshops were held in London, Birmingham, Edinburgh, Swansea, Durham and Belfast during October – November 2007 by Ipsos Mori
- Each workshop comprised around 30 participants, recruited according to age, gender, media platform usage, social class, internet access and location
- Following this, a day-long reconvened workshop was held in London comprising around 30 participants drawn from the first six workshops

PSB Tracker

- Over 7,000 telephone interviews conducted each Jan, April, July and Oct since Oct 2005 by GfK NOP
- Respondents are asked to rate their satisfaction with the delivery of PSB purposes and characteristics across each channel and taken together
- Reporting focuses on self-defined regular viewers of each channel

A variety of audience research sources (2)

Media Literacy Audit (MLA)

- 2,905 face to face interviews conducted from October to December 2007 by sr-b
- Supplemented with data from the Residential Tracker survey, conducted across July-September and October-December 2007; over 2,200 face to face interviews each quarter

Media Literacy Audit report to be published late spring 2008

PSB online survey

- 3,003 respondents from the GfK NOP online panel
- Fieldwork conducted in December 2007, 25 minute average length of completion
- Respondents asked to rate websites they regularly/had been to in last 3 months across variety of PSB statements. Other general and comparative questions included