

**Ofcom review of public service television broadcasting:
Phase 1 supporting documents**

Volume 1 – the role of television in society

3. Audience opinions and perceptions

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Executive summary

As part of Phase 1 of Ofcom's review of public service broadcasting television, we have conducted a number of pieces of audience research to help understand how viewers think about and value television, especially programmes provided by the main terrestrial TV broadcasters.

We used as our starting point the four main components – defined using the Communications Act as a starting point – which together can be taken as the core purposes of PSB, namely:

- € Social values;
- € Range and balance;
- € Quality; and
- € Diversity.

We also asked audiences a range of questions about the more mainstream, entertainment function of television, to see how viewers would rate these elements alongside what are typically perceived to be the main elements of public service broadcasting. Key messages from our respondents are summarised here, and they underline the uniquely important role that television continues to play in our lives.

1. *The provision of entertainment is television's primary purpose*

Programming which entertains and engages is the critical element in audience appreciation of television. 71% of our survey sample say that television is their major source for entertainment, with books coming a distant second at 6%. Entertainment is what people say they most appreciate about television, and it is as a form of relaxation that TV fits in with many people's everyday lives.

2. *TV is seen as having a significant responsibility to society*

The fact that television is a medium for entertainment does not mean that viewers downplay its importance to society as a whole. Rather, television is seen as playing a significant role in enabling a cohesive society. For example, genres which provide a form of mainstream connection between viewers in terms of shared experience – i.e. sports and soaps – are seen as more important for the good of society than are other more specialist genres.

3. *This view is common across all major demographic groups*

There is notably little variation in opinions about the need for terrestrial television to have this 'societal glue' role: either by age, platform, socio-economic group or geographic region. While Sky and cable audiences tend to have different television habits, for example in the ways that they choose programmes, their views about television do not appear to be significantly different from the population as a whole.

4. *Most of the components of PSB are held to be of importance*
PSB is not well understood as a concept. However, when prompted, most of the components of PSB set out in the Communications Act are considered to be important components of UK television. Issues of range and balance in programming and across the schedules, production quality, and the social value of certain types of content (e.g. keeping the population well-informed) are considered most important, with issues of diversity less so.
5. *While many genres are important to people, there is some dissatisfaction with current provision*
News programming is consistently seen as the most important and best delivered genre. Regional programming is important to many people, and there is a strong belief in plural supply. However, there is evidence that audiences aren't very engaged with regional programming, and further investigation is needed to ascertain more precisely the reasons for this. Programmes dealing with minority interests are also less valued by the population as a whole. Instead, a kind of 'civic universalism' appears to be a guiding principle for many: that emphasis should be placed on encouraging cohesion through the inclusion of minority interests and groups within mainstream programming rather than developing silos for specialised interests or ethnic groups.
6. *Programme innovation scores poorly for many*
Programme quality is perceived to be falling in some areas, with concern over the amount of formulaic programmes. While the much-berated formats of reality TV and makeover shows continue to do well in terms of viewing figures, viewers feel strongly that this type of programming is derivative, and that more could be done to create original programming.
7. *Appropriate programming and scheduling are key issues for many viewers*
Viewers are significantly dissatisfied with scheduling to protect children from unsuitable content. Audiences expressed concern at the inappropriate content of certain pre-watershed programming, in particular some of the storylines in soap operas. Viewers want their expectations of a programme's content to be honoured. In addition, viewers can feel insufficiently provided for to varying degrees because of the competitive nature of the major channels' schedules. Scheduling policy and appropriate programme content thus become key measures of a channel's respect for its audience.
8. *Viewers see benefits in the current mixed schedule strategies of terrestrial provision*
Most people feel that the terrestrial channels should continue to provide a broadly-based schedule that provides a good variety of programming types. By extension, they also see value in a plurality of programme supply. However, a more mixed message emerges over whether programming for minority interests and groups is better carried out on specialist channels.
9. *Television could have a more proactive role*
Specialist interest groups see potential for the main terrestrial TV channels to play a more active role in terms of community engagement. They feel that more local (and regional) services could be provided, which would properly reflect both meaningful community structures and the social and cultural activities which exist at the community level (e.g. local arts, local sport). Also, they would like television to do more to help inspire people to get involved in – for instance – the political process, or lifelong learning.

10. Viewers want to preserve widespread PSB provision

When we asked viewers directly in our deliberative forums whether, given finite resources, PSB obligations should be reduced or minimised for some channels, there was strong endorsement of the current regulatory situation. If change were necessary, then viewers preferred to see requirements slightly loosened across the board rather than be unequally applied. They were loath to remove obligations from existing channels.

In summary, television is seen to be a hugely important and influential medium for the majority of the population. Audiences want the main terrestrial channels to offer easy access to responsible, high quality, varied and innovative programming that offers a shared experience.

Television is consistently seen to provide, at least in theory, benefits to society as a whole through educative, informative, and cohesive programming. It also has an overarching remit to entertain. Viewers appear to combine these twin roles to emphasise the need for inclusive, mainstream programming as the preferred vehicle for social messages – without those messages taking undue prominence.

Introduction

To inform the Phase 1 report, and to lay the groundwork for further investigation to be carried out over the course of the Review, Ofcom commissioned a number of pieces of audience research. The goal was to explore viewers' current opinions about both the importance and delivery of various aspects of public service broadcasting on UK television. We used a number of methodologies so that our key findings from each piece of research could be verified – or challenged. We have also drawn where applicable upon previous research conducted in these areas by the ITC, BSC and other third parties. The research activity comprised:

- € A comprehensive quantitative survey of 6,000 people carried out by Ipsos-RSL and NOP. It comprised a self-completion questionnaire filled out by a nationally representative UK adult (16+) sample of 4,000 (the QUEST panel), and a separate control cell of 2,000 adults via NOP's omnibus survey. The QUEST panel data was analysed according to a number of key demographics including sex, age, socio-economic group, geographic location, TV platform, and ethnic background.
- € A series of 12 focus groups around the UK – Leeds, London, Inverness and Wrexham – to determine the ways in which the viewing public understand and think about the components of PSB as set out in the Communications Act. These were conducted by researchers at the Institute for Communications Studies, University of Leeds. Groups represented a range of combinations of age, gender, social status and ethnicity in order to ensure the inclusion within the overall study of key demographic dimensions when reflecting the diversity of the viewing population. Each group consisted of between six and ten individuals and lasted for up to two hours per group.
- € Interviews with representatives for specialist interest groups, carried out by The Knowledge Agency. These interviews complement the large-scale survey by providing the views of particular groups to whom PSB programming and services are particularly relevant, and to whom the benefits of PSB are disproportionately important. The sample was structured to represent specialist interest in the following areas: children and education, democracy, arts and classical music, religion, sport, lifelong learning, consumer and health and diversity (with specific reference to ethnic minorities, the disabled and the elderly). A total of 44 one-hour confidential interviews was conducted, across the UK, with individuals representing a mix of age, sex and level of professional experience/influence.
- € Six deliberative forums moderated and convened by Wardle Mclean. These were held around the UK in Leeds, Norwich, Belfast, Swansea, Plymouth and Glasgow. Approximately 70 participants were recruited at each one - each sample being broadly representative of the populations in these areas. Participants took part in plenary debates, but also had the opportunity to speak in smaller break-out groups, where terrestrial-only and multichannel viewers were separated to look at any differences in attitudes. The key principles of PSB were outlined for them, and they were presented with some of the dilemmas and pressures facing the main terrestrial broadcasters by representatives from the BBC, ITV1, Channel 4, and S4C (in Swansea) whom they were able to question. Finally, they were asked to vote on a series of hypothetical scenarios - all of which involved reducing PSB obligations in some way – as an indication of the aspects of PSB they most wanted to protect.

Defining public service broadcasting

'Public service broadcasting' as a concept is, unsurprisingly, little-known outside media industry and political circles. When asked directly¹, some people equate PSB with non-commercial activities:

- € 'no advertising'
- € 'basically not commercial television'

and others that its major purpose is the provision of a range of programming:

- € 'just getting the balance right for all of us, 'cos we are all so different'
- € 'they've got to meet everyone's needs'

It is also seen as synonymous with public information campaigns or wider public services:

- € 'Safety warnings, like 'how not to electrocute yourself''
- € 'PSB – that's what we call council telly'

PSB was also not well understood as a concept by representatives of specialist interest groups, such as teachers and community leaders. The most immediate link was with the BBC, with some also aware that Channel 4 is defined as a public service broadcaster. There was next to no spontaneous recall of ITV having public service obligations, and none at all for Five.

Therefore, in order to find out what viewers think about PSB, Ofcom drew up a list of elements which, taken together, form the core purposes of PSB, using the Communications Act as our starting point. We did not, however, ask viewers about their opinions of 'PSB': our survey was concerned with attitudes to television, but was structured to reflect the purposes of PSB set out in the Communications Act.

The four key elements are:

- € Social values;
- € Range and balance;
- € Quality; and
- € Diversity.

We also added to this list a number of elements that relate to the more mainstream, entertainment function of television – programmes that appeal to the majority, programmes that are entertaining, live sports events and so on, to see how viewers would rate these elements alongside what are typically perceived to be the main elements of public service broadcasting.

¹ In focus groups and in the deliberative forums

Our goal was to find out how viewers rank these various components. Firstly, what importance do they attach to them? What are the key issues that emerge about their relative position in viewers' hierarchies of value, and how do views differ across the main demographic groups – age, sex, socio-economic status, geographic location, ethnicity?

Which audiences feel best-served, and which feel under-served? How well do viewers think the components of PSB are being delivered? As noted above, of particular interest is the extent of difference or similarity in response between viewers with different modes of TV delivery – Sky, cable, Freeview or terrestrial-only.

In addition, we asked viewers for their opinions of the importance and delivery of a range of programme genres. We asked them to judge these genres according to their own personal tastes, and also according to how they thought they benefited society more widely.

We wanted to know what viewers thought of the main terrestrial channels, and the type of programme obligations that should be in place. In particular, we explored how niche or specialist channels were seen, and whether viewers felt that they could or should be the home for certain kinds of programming.

Finally, we asked a range of questions about viewing habits – in particular, how people make their choices about what to watch. Again, a key goal for these questions was to try to find out in what ways multichannel and younger audiences are changing their programme choice habits, which in turn has potential repercussions for the long-term sustainability or desirability of a mixed schedule model.

Methodological note

It is important to note at the outset that while there are a number of issues and practices where demographic differences are visible in responses to the survey, overall there are fewer differences of opinion than might be expected.

Even on subjects such as regional programming where there might reasonably be expected to be variation between the various Nations and Regions of the UK, not least because the programming itself varies according to region, there are few significant differences in response between the groups².

There is also less difference in opinion than might be expected from multichannel viewers. This may be due to the fact that while the 'multichannel' audience even just a few years ago was one that was markedly different from the demographic profile of terrestrial viewers, multichannel is now much more mainstream, with half the UK population accessing more than the terrestrial channels. Indeed, the Freeview audience has its own distinctive composition: from the evidence of the survey they are far more 'pro-PSB' than other viewers, and far more likely to place responsibility and obligations upon broadcasters, particularly the BBC. Such a profile may well alter as Freeview is adopted more widely.

Finally, it should be noted that the responses given were at times contrary, both within the survey, and also within focus groups and other discussions. These contradictions that arise in people's opinions about television are both inevitable and understandable. We do not often

² Notwithstanding the identification of a broad trend whereby respondents in Northern Ireland tended to give more positive responses, and those in Scotland less positive responses, to a wide range of questions.

think in pure linear fashion, with rational and logical explanations for our thoughts and deeds. Rather, much of our thinking is overlapping and inchoate, and it is important to reflect this in the audience research.

'Watching television' implies active viewing. Viewers are well aware of the distinction between this and having the television on as a background to other domestic activities. One participant in a deliberative forum made this apparent when responding to a question about programming. She began by saying 'I watch - ' but then corrected herself and went on '- well, I don't *watch*, I put it on'.

This serves to underline the variety of ways in which we watch television. Given that each of us is unique, we all have different responses to what we watch depending on our upbringing, age, geographic location, hobbies and interests, intellect, schooling, and sense of humour.

We will have further differences depending on our mood, the time of day, with whom we are watching, our expectations of the channel, programme and the schedule, and so on.

The picture that follows is therefore at times inconsistent, with some views appearing to point to one conclusion, while other views lead in an opposite direction. The strength of making this inconsistency explicit is not only that it is a true reflection of opinions, but also that it makes those areas where there is emphatic majority even more resonant. What are the areas where there is common agreement, across the research methods and the variety of ways the issue may have been addressed?

It also provides us with a framework for further research in Phase 2 of the review. Which areas do viewers find hard to reach decision over? Why do they find it hard?

1 The importance of television

The importance of PSB can first be indicated through a reminder of the value that people attach to television as a whole. As the representatives of specialist interest groups noted, television is hugely important in people's lives. They feel it to be especially *influential* on young people, not least because it is a major source of information for them, and especially *important* for older people, acting as both a companion and a bridge to the outside world.

Across our research, there was strong endorsement of the normative impact television can make upon political decision-making and societal understanding. While TV is there to entertain its audiences, this does not preclude it being seen to play an integral role in the shaping of societal values. Indeed, as Figure 1 shows, there is little support from our survey sample for TV to be *solely* or even *mainly* about the provision of entertainment: more is required from the medium by audiences.

Figure 1: What do people think TV is there for?

Question: *How much do you agree or disagree with the following statements?*

Note: 'agree' includes those who strongly agree

Base: all respondents

<i>Top attitude statements</i>	<i>Agree (%)</i>	<i>Bottom attitude statements</i>	<i>Agree (%)</i>
There should be programmes on television that make you stop and think	81	If people want to watch minority or specialist interest television programmes they should be expected to pay for them	19
Television coverage of news and current affairs has an important role to play in helping people to make informed choices	76	For me, television is just a source of entertainment, nothing more	18
Television is very influential in shaping public opinion about political and other important issues	76	Television's main role should be to provide entertainment rather than information or education	11
TV should help to make us a better society, by showing programmes that increase our understanding of each other and the world	76	The portrayal of violence on television has no real effect on violence in society	10

Source: Ofcom

Sky and cable viewers are just as likely to respond positively to the societal role of TV, and in some cases more strongly than the overall sample. For example, while 76% overall agree that *TV coverage of news and current affairs has an important role to play in helping people to make informed choices*, 80% of Sky and cable viewers felt this way. Likewise, 80% of Sky and cable viewers felt that *TV should make us a better society by showing programmes that increase our understanding of each and the world*, 4% more than the total sample. As we shall see later, Sky and cable viewers also tend to prioritise and appreciate the entertainment function of television more than terrestrial viewers.

As an initial indication of the importance of television in people's consumption of both entertainment and information, we asked our survey respondents to say which media form is their main source for these various elements.

Figure 2: Main source for different types of entertainment and information (%)

Question: Which of the different media available to you, such as television, radio, cinema etc., would you say is your main source for each of the following categories?

Base: all respondents

Category	Entertainment	Knowledge about science, history, nature etc	News about Britain and the world	Sports news and information	Information about my area/ region	Features about my personal interests and tastes
<i>Media source</i>						
TV	71	58	55	51	37	23
Radio	3	2	12	8	10	3
Newspapers	1	2	22	15	36	8
Magazines	2	3	0	1	1	27
Cinema	1	0	0	-	-	0
Books	6	19	0	0	2	15
Internet	1	3	1	2	1	7
Videos/DVD	4	1	0	-	-	2
Video games	1	0	0	-	0	0
None/don't know	1	3	1	13	3	5
Not answered	10	9	9	10	9	10

Source: Ofcom

As Figure 2 shows, television is the majority's main source for most types of entertainment and information by some margin, except for *regional information* where it is neck and neck with the press, and for *personal interest features* where magazines are the preferred source for the majority.

ABC1s and 35-54s are slightly more likely to use newspapers for regional information, as are Londoners and those in the Midlands. Other areas plump more solidly for TV, except in Scotland where, like the survey sample as a whole, there is only one percentage point separating TV and newspapers.

For features about personal interests, there are some differences by age, geographic location and ethnicity: over-55s put TV first by a small margin, as do people in the North of England and Wales. Ethnic minorities put TV first by some way – 30% saying TV is their main source, then books at 20%, then magazines at 16%. Sky viewers are more likely than the overall sample to choose magazines (33%) than TV (24%), as are younger viewers aged 16-24.

These responses show that TV is the dominant means of delivery for broad entertainment and information. For more specific or personal needs – local area and hobbies – other media also play an important part. In particular, the Internet is growing as a source for information about personal hobbies – 14% of those who access the Internet gave this as their main source.

This points to a use-value for television as a mass or generalist medium; a view that is backed up by many of the responses to our various questions.

The components of PSB

Given that television overall is seen as an important and influential medium, what about the specific elements of PSB programming? We asked viewers in our survey to state how important they thought it that terrestrial television provided a number of different aspects, designed to reflect the 'PSB components' set out in the Communications Act. We did not ask about 'PSB' but about what viewers thought of and wanted from 'the main terrestrial channels', and – for certain questions – from 'UK TV as a whole'. Their views on the importance of the 'PSB components' are summarised in Figure 3 below.

Figure 3: the components of PSB

Question: How important do you think it is for the main terrestrial channels between them to provide each of the following?

Base: all respondents

Note: components in black typeface were added to judge the importance of mass/ mainstream entertainment in relation to the other core elements of PSB

*: those stating component is either 'very' or 'quite' important

Component type	Component	% stating component is important*
Social value	News and other programmes that keep the population well informed	87
Social value	A schedule of programmes that protects children from unsuitable content	85
Range and balance	A balanced diet of different types of programme (both general entertainment and other types) within the peak viewing hours of 6pm-10.30pm	84
Range and balance	A choice of different kinds of programme across the main channels at all times of the day	82
Social value	A variety of informative factual programmes	82
Range and balance	A wide variety of different programme types e.g. news, sports, documentaries, entertainment, religious, arts etc.	82
Quality	High levels of technical and professional skill in programme-making e.g. strong acting, good locations etc.	81
	Popular entertainment programmes	80
Diversity	Programmes that are targeted at a wide range of different audience groups	80
Quality	A high proportion of first run programmes i.e. not repeats	80
	Programmes that will appeal to most of the people most of the time	79
Quality	Programmes that meet generally accepted standards of taste and decency	79
Quality	Programmes that make you think	77
Quality	Lots of new and innovative programme ideas	76
Social value	Specialist educational programmes for children and adults	76
	Programmes that meet my personal needs	74
	At least some channels that do not carry advertising	74
Quality	A high proportion of programmes made in the UK	74
Social value	Programmes that people will feel they have learned something from	74
Social value	Programmes that promote fair and well-informed debate	71
Social value	Programmes that protect our national heritage and keep traditions alive	71
	Live coverage of major or global sporting events e.g. The World Cup or the Olympics	70
Social value	Programmes that promote or support social action campaigns e.g. Crimestoppers	68
Diversity	Programmes that reflect the needs and concerns of different regional communities within the UK	65
	Live coverage of other popular sporting events e.g. Premiership football, Formula One, the Grand National	63
Social value	Live coverage of major political/social occasions e.g. Royal weddings, Golden Jubilee, the budget etc	62
Diversity	The promotion of awareness and understanding of different communities	59
Diversity	Representation of wide range of different political and social viewpoints	58
Social value	Programmes that promote or support educational and other public initiatives e.g. The Big Read or Restoration	58

Diversity	Programmes for minority interests	57
Diversity	Programmes that reflect the needs and concerns of different ethnic communities within the UK	48
Social value	Programmes that promote participation in, and enjoyment of, the Arts	48
Diversity	Programmes that reflect the needs and concerns of different religious communities within the UK	44
Diversity	Programmes that reflect the needs and concerns of other minority groups such as the Countryside Alliance and gay people	35
	Popular programmes from America	27

Source: Ofcom

It is immediately striking that scores are high. Two-thirds of the statements are felt to be quite or very important by 70% or over of viewers. While this underlines that viewers are committed to this range of ideals or goals, it is also true that we are asking here about norms of programming that are hard to disagree with – programmes with high production values, for example, or programmes that keep the population well-informed.

Rather than the absolute ‘scores’, then, it is the *relative position* of these components of PSB that is the main illustrative vehicle for assessing the importance viewers attach to them.

Social values

The ‘social values’ components of PSB include elements which

- € **educate** citizens through specific specialist educational programming as well as more general informative factual programming;
- € further an **informed democracy** through news and current affairs programmes and social action campaigns; and
- € enable **cultural identity** to flourish by reflecting the UK in its entirety to itself as well as specific initiatives in arts and national heritage

A well-informed population is consistently the most highly valued and rated element of PSB across the board. *News and other programmes that keep the population well-informed* therefore came top of these social values components (see Figure 3), with 87% finding it important. This component was also top of the overall rankings. There were no demographic differences of note in responses.

Another unequivocal response is that 85% of viewers feel that it is important that terrestrial television schedules programmes so that children are protected from unsuitable content. In other words, television has a duty of care to its vulnerable viewers. As we shall see later, this is not necessarily felt to be adequately delivered by the channels.

An educated citizenry seems to be important to viewers, with strong support for programmes which provide specialist forms of education (76%), and for a variety of informative factual material (82%).

However, there is some evidence of less support for those mainstream programmes which aim to encourage the general public to become directly involved in more specific *cultural* pursuits: programmes that support public educational initiatives like *The Big Read* (58%), or

that promote participation in the Arts (48%), are seen as somewhat less important to deliver than broad educational objectives³.

This is somewhat surprising, as our research elsewhere tells us that most respondents consistently prioritise the inclusion of specialist content or special interests *within* mainstream programmes rather than having them as distinct programmes or on specialist channels. For example, in the deliberative forums, viewers asked for more 'education by stealth' – programmes that were attractive and entertaining but which also taught you something you didn't know before.

Some of the questions asked of our survey sample were 'forced choice' options, with respondents having to indicate their support or otherwise for two 'opposing' statements. In response to one such question, a majority felt that educational content is better in mainstream programmes than as specialist programmes (42% and 25% respectively).

The less than emphatic support for mainstream arts programmes could simply mean that viewers do not find the cultural arts to be a critical aspect of societal cohesion, while the broader 'educational' programmes are valid both as distinct programmes *and* when woven into more mainstream product.

This view of the cultural arts is of course not one that its advocates share. Interviews with arts specialists showed that there was concern that specialist channels like BBC FOUR were stalking horses that would result in further diminution of arts coverage on the main terrestrial channels.

Range and balance

The 'range and balance' rubric identifies those elements of programming which, taken together, provide balanced schedules and a mixed diet of programming.

All aspects of our research show this to be a significant factor in viewers' appreciation of television. In our survey, as Figure 3 shows, all the elements of balanced schedules and mixed programming are held to be of significant importance in comparison to the other components. All of them were judged to be important by over 80% of respondents, with little variation in responses by the main demographic groups.

Indeed, notwithstanding (or perhaps because of) their familiarity with themed output, Sky audiences were marginally more likely than terrestrial viewers to appreciate *a choice of different kinds of programme across the main channels at all times of the day*, with 88% finding it important as distinct from 86% of terrestrial viewers. And 16-34 year olds were just as likely to find it important that there is *a balanced diet of different kinds of programme in peak-time* as those aged over 55.

This point was also brought home in the 'forced choice' section of the survey, in which respondents were asked to make choices between two conflicting statements. Variety of

³ In these areas, there are few differences in responses by the main demographic sub-groups beyond what might from a common sense perspective be expected. For example, ABC1s are keener on programmes which promote enjoyment of the arts (55%) compared to C2DEs (42%). Somewhat less intuitively, 58% of Londoners rate this as important compared to 42% of Scottish respondents. Elsewhere, however, the demographic differences are few, with for example 16-34 year olds just as likely as the over 55s – if not slightly more so – to find the provision of specialist educational programmes important.

programming and scheduling was the preference of the majority, even if a significant minority preferred the more popular, familiar programme types⁴.

The emphasis on the importance of scheduling balance is a finding echoed across much research work into audience views on broadcasting. For example, in *Public Service Broadcasting: What Viewers Want*⁵, which examined public attitudes to PSB using a range of methodologies, findings again indicate strong support for a mixed schedule.

This was further underlined in the deliberative forums, with participants frequently airing their concern and frustration that channels offered little complementary programming, instead providing broadly similar fare with little variety.

Some felt that this was due to too much competition between channels resulting in spoiling tactics; and that broadcasters should work co-operatively to draw up mixed schedules. Others argued that rival broadcasters could not be expected to work co-operatively, but should nonetheless ensure unilaterally that their schedules did not clone existing formats too slavishly. In all forums, there was criticism of programme ideas such as *Wife Swap* being over-used in several different formats and copied by other broadcasters, ending up spreading over all the channels. One participant described it as 'bandwagon TV'.

Underpinning these views on scheduling was a sense that broadcasters should not be riding rough-shod over viewers' viewing commitments: if viewers have chosen to watch TV then they feel entitled to expect a reasonable variety to choose from. As focus group respondents noted, they can feel as if they are 'ratings fodder' rather than provided with interesting and sensible scheduling variety.

Quality

Programme quality is another critical factor in viewers' appreciation of what TV offers, and its importance serves as a reminder that audiences watch particular programmes, not genres.

At the Leeds deliberative forum viewers were asked for their definitions of 'quality programming', and came up with the following comprehensive range of views. These were prefaced by the first participant's reminder to the chair that 'quality is different for every single person'.

Production values

- *'when they've put time and effort into it. Good actors, good camera-work, good scripts'*

Enduring

- *'when it stands the test of time. In 20 years' time you'll still be showing it'*

Innovation

- *'something that challenges the status quo, doesn't conform to what people think'*

⁴ When asked to choose between a *wide variety of programme types* and *more of the programmes that most people want to watch*, Sky viewers, women and C2DEs were slightly more likely to plump for the popular, but a majority of these groups still preferred to see variety.

⁵ *Public Service Broadcasting: What Viewers Want*, ITC January 2001

Integrity

- *'not a barmy adaptation: true to the story'*

Moral standards

- *'something I could leave my grand-daughter to watch quite happily'*

Thought-provoking

- *'something you talk about and think about afterwards'*

Compelling

- *'something you enjoy, look forward to watching the next week'*

Enjoyable

- *'enjoyment of the lower quality programmes too'*

Viewers want programmes to be entertaining. They want programmes to have high production values: it is of note that 81% of those surveyed rated *high levels of technical and professional skill in programme-making* as important: the seventh highest ranking out of the 35 components.

Survey respondents also want high levels of first-run programmes (80%), and appear to prefer domestic TV (74% want a high proportion of programmes to be made in the UK) to that made in the US (only 27% felt it important that terrestrial channels show *popular programmes from the US*).

This view is broadly consistent across the main demographic groups. Older viewers are slightly less keen on first-run programmes – 76% of the over-55s find this important compared to 85% of those aged between 16 and 34 – hinting at a greater appreciation of repeat programming by older people. But in spite of a programme diet that might be expected to contain more in the way of US programmes and series, younger viewers are almost as likely as older groups to want original UK programming – 72% and 76% respectively, as are Sky viewers compared to terrestrial – 76% and 81%.

Viewers also desire innovative programme ideas, with 76% of the overall sample finding this of importance. Younger viewers are more appreciative, with 82% wanting innovation compared to 72% of those over 55.

Programme quality, whether it be related to production values or stimulation – 77% of respondents rated *programmes that make you think* important to provide – is an integral part of viewers' appreciation of the terrestrial channels' composition.

Diversity

The final element of our PSB components is diversity of programming. We asked viewers in our survey for their opinions on the importance of programmes which reflected the needs and concerns of different regional, religious, and ethnic communities, as well as minority interest groups. We also asked them more generally about programmes that are targeted at a wide range of different audience groups.

While, as seen earlier, variety in scheduling and programme is held to be critically important by viewers, 'variety' does not appear to be synonymous with 'diversity'. There seems to be

significant resistance from many viewers to the fragmentation or compartmentalising of different minority interests and groups.

If we refer back to Figure 3, the elements relating to diversity – with the exception of *programmes that are targeted at a wide range of different audience groups* – are seen as notably less important than the other components of PSB. This is also the view of ethnic minority survey respondents⁶.

At first sight the lower level of importance attached to programmes for minority interests and groups could perhaps be read as viewers wanting to deny non-mainstream voices, but a more complex picture is likely.

While undoubtedly some might feel that minorities should not be catered for, others may be simply indifferent or undecided. Around one quarter of survey respondents were ambivalent about these issues, answering that they were neither important nor unimportant, rising to nearly one third in the case of programming that reflects the needs and concerns of minority interest groups like the Countryside Alliance or gay people.

It is perhaps the case that if viewers feel they are not the obvious target audience for such programmes, then they don't feel it is their right to pass comment or judgement on the legitimacy of such programming.

A further explanation for the lower importance apportioned to minority interests and concerns is that the viewing public appears to be majoritarian in its approach to what ought to appear on television. As the Leeds University researchers identified, a kind of 'civic universalism' appears to be a guiding principle for many: that emphasis should be placed on encouraging cohesion through the inclusion of minority interests and groups within mainstream programming rather than developing silos of specialist interests or ethnic groups.

A deliberative forum participant encapsulated this view when giving the reason for not wanting religion to be shown on terrestrial TV, saying 'it's a personal thing'. In other words, what is of *personal* interest or benefit to someone is not perhaps an appropriate criterion for it to merit being included on terrestrial television.

Responses to some of the 'hard choice' elements of our research back up this view. When asked to choose between *programmes that reflect the needs and concerns of different communities within the UK* and those which reflect *the needs and concerns of the UK as a whole*, viewers opted for the latter by a ratio of 4:1. Ethnic minority respondents were less emphatic, but still in favour of the majoritarian perspective, with 24% preferring to see different communities represented and 36% preferring a reflection of the UK as a whole⁷.

⁶ While ethnic minority viewers rated these minority interest components more highly than the overall sample, and other components lower, nonetheless their overall ranking followed the same pattern, with minority interest programming coming last. There is some qualitative evidence of these types of programme needs being catered for by specialist channels, and so these groups therefore look to terrestrial PSB for complementary, more integrationist fare.

⁷ 21% could not decide one way or the other, and 20% did not answer the question. Ethnic minority respondents tended to have a higher "not answered" rate for most questions than the sample as a whole; arguably a result of feeling that television is less "for them" than other respondents.

There are of course two elements of 'diversity' embedded in this choice. The first is that of the imperative to show minority interests and communities. The second is more contested or problematic: that mainstream culture should comprise the 'British' perspective as the dominant mode.

In terms of the portrayal of minority interests and groups, viewers seem to be saying not that such portrayal is illegitimate, but that it should take place within mainstream programmes rather than on separate programmes or channels.

This is a view that is also propounded by the representatives of specialist interest groups. They would like to see their minority groups more effectively and equitably portrayed on mainstream programmes rather than sidelined into themed channels. They expressed concern over the propensity for caricatures to be built up – not only ones based on racial differences but also based on lifestyle or age-group – examples included the elderly and people working in business. Interviewees had an overall perception of an industry run by and for the white middle-classes, and primarily targeting the young.

As recent ITC/BSC research reported⁸, for ethnic minorities the benefits of mainstream portrayal include a demonstrable sense of belonging within British society, and provides children with positive representations onscreen.

In the deliberative forums, viewers saw a role for television to promote a more tolerant society by reflecting the multicultural nature of UK society in everyday programming. The tastes and interests of ethnic minorities were considered likely to be as varied as anyone else's, and that it was therefore patronising to think that they would need their own programmes. Strong views were expressed in Glasgow about television's duty and responsibility towards educating audiences – one Sikh participant talked of his experience following September 11 and how he felt that TV had played a role in perpetuating misunderstanding of his religion and culture: 'I am giving you my identity. You have a responsibility to show it accurately'.

However, focus group research told a slightly different story. While inclusivity within the mainstream was again the overriding message, the reasons for it were based more on a 'fair play' norm than one of active tolerance. It was felt that minorities of whatever sort could not as of right expect privileged treatment such as dedicated allocation of airtime.

When survey respondents were asked directly about how minority interests and groups should be represented on screen (the question made it clear that these could be regional, ethnic or religious):

- € 42% of viewers felt that they preferred representation within mainstream programming, rising to 52% of the ethnic minority respondents.
- € 20% preferring specific programming.
- € 22% preferring such interests to be the province of additional channels.

In summary, viewers appear to see TV as needing to provide something for everyone, but within a structure that is majoritarian in outlook.

⁸ *Multicultural Broadcasting*, ITC/BSC Nov 2002

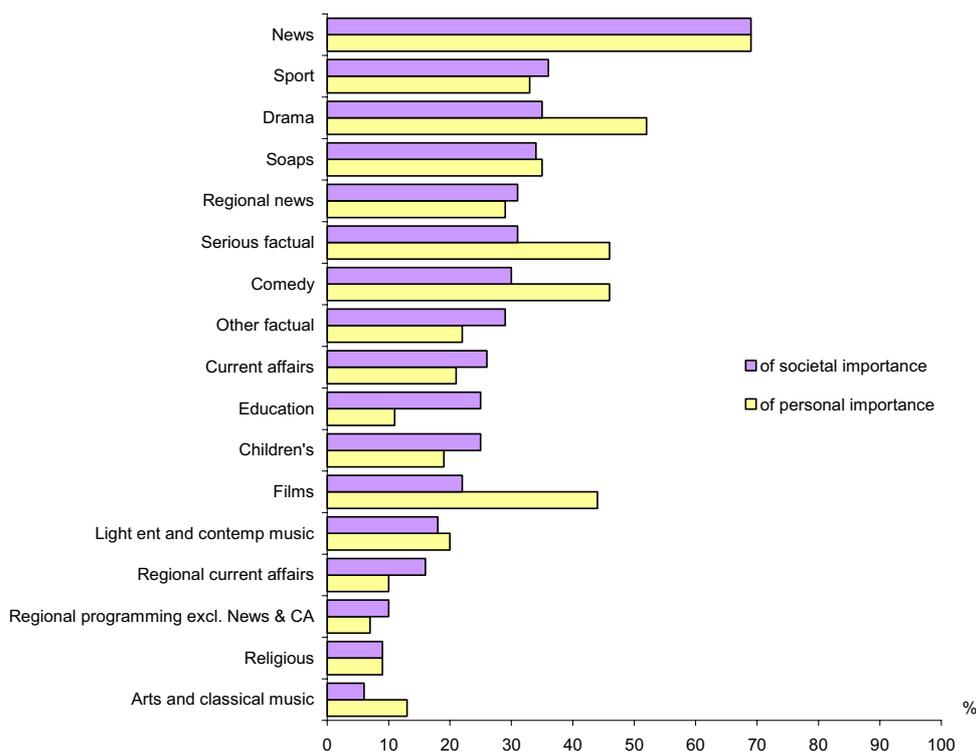
Such a view is equally prevalent among multichannel viewers who might be expected to think about TV's role in a different, less cohesive way, and have more appreciation of specialist-interest programming. When asked how important it was for programming about various minority interests and groups to appear on terrestrial television, digital audiences attached similar levels of importance as terrestrial audiences. As some deliberative forum participants noted, they felt fortunate to be able to afford multichannel; they knew that others couldn't and felt therefore that terrestrial television ought to remain comprehensive in scope; and that in any case multichannel augmented their personal viewing experience but did not replace the societal benefit they felt accrued to terrestrial television.

Programme genres

Figure 4: The personal and social importance of programme genres

Questions: Please choose the five types of programmes whose presence on the main terrestrial channels you consider to be most valuable to you and your family (if relevant) personally/ ... you consider to be most important for the good of society as a whole.

Base: all respondents



Source: Ofcom

As mentioned above, there are indications from our research of a strong attachment by viewers to the idea that TV is a form of societal cohesion or 'social glue', binding the nation together through majoritarian programming.

When we asked viewers to choose the five programme genres (out of 17) that they felt to be of personal importance to them, and the five they felt to be of value of society as a whole,

this point was underlined, as Figure 4 illustrates. Because viewers were asked to choose only five genres out of 17, overall these percentages are lower than they would have been if each genre had been asked about separately. Again, the relative positions are what matter more than the overall percentages.

While News was seen to be of value both at a personal and a societal level, the next most valuable *societal* genres were felt to be sport, drama and soaps. While drama is rated highly in terms of *personal* importance, soaps and sport appear lower down in viewers' personal rankings – coming sixth and seventh respectively.

This would appear to indicate that genres providing a form of connection between viewers in terms of shared experience are seen as important for the good of society as a whole. The Broadcasting Standards Commission's recent research on soaps (*Dramatic Licence*, BSC July 2003) notes that viewers see soap operas – rather than the dramas of old – as the place where social issues are raised.

Ofcom is keen to explore this issue further. As representatives of specialist interest groups make clear, there is significant societal benefit to be drawn from accurate and sensitive depictions of social issues in mainstream entertainment. In addition, viewers are well-aware of the benefits of programming which attracts large audiences and is discussed with colleagues and friends afterwards. At the deliberative forums, participants noted the benefits of this – quality was defined by one participant as 'programmes that you talk about afterwards' – and some concern was expressed that this was on the wane. In the Swansea deliberative forum, there was a strong sense of a loss of family viewing time, with very few programmes now able to unite the family around the main set.

The importance of talking about television programmes – either as a family or with colleagues or friends – is underscored by MORI research⁹ which shows 'television programmes' to be the most popular topic of conversation over the last two decades¹⁰.

As the relative levels of importance of the various elements of PSB showed above, there is less appetite from viewers for the specialist-interest genres. Religious and arts programming is held to be of little societal or personal importance to many survey respondents – although even here it should be noted that one in 12 still ranks religious programming in their top five genres for the good of society, and one in 8 sees Arts programming as one of their top personal genres.

As we shall see below, while there are relatively few that value these types of programmes for themselves, there remains a commitment from the majority that such types of programmes should not be removed to specialist channels. Religious programming, for example, is especially important to older viewers, many of whom feel that there is insufficient programming to cater for their tastes and interests generally.

A slightly more critical view emerges from the specialist interviewees. Religious groups tend to have a fairly ambivalent relationship with television: while acknowledging its potential to be a moral force, there is some concern that it has abdicated much of that responsibility. This view is particularly prevalent among those who perceive an anti-Muslim tone since the attacks of September 11th. There is a desire from these religious bodies to have more coverage of religious perspectives throughout the week and throughout the year rather than

⁹ MORI Television Opinion Monitor (TOM)

¹⁰ albeit with some tail-off over the last year

focused on particular major events or key days of the week – in other words, that issues and questions of faith can usefully be woven into a variety of other programmes rather than kept as a stand-alone.

Summary

The importance of television, and key aspects of public service broadcasting, is undisputed.

Viewers think it important for the main terrestrial channels to provide a variety of types of programme, a well-scheduled diet, programmes that have high production values and that are innovative and entertaining.

They are less concerned about the portrayal of minority interests and groups. It is important to note that they don't see these elements as being a top priority for television; not that they are unimportant *per se*.

Terrestrial television's function, then, is to act to bring audiences together, to provide responsible, high quality, varied and innovative programming that offers a shared experience.

In the light of this, a key question is as follows: to what extent do viewers feel that this is being adequately provided at the present time?

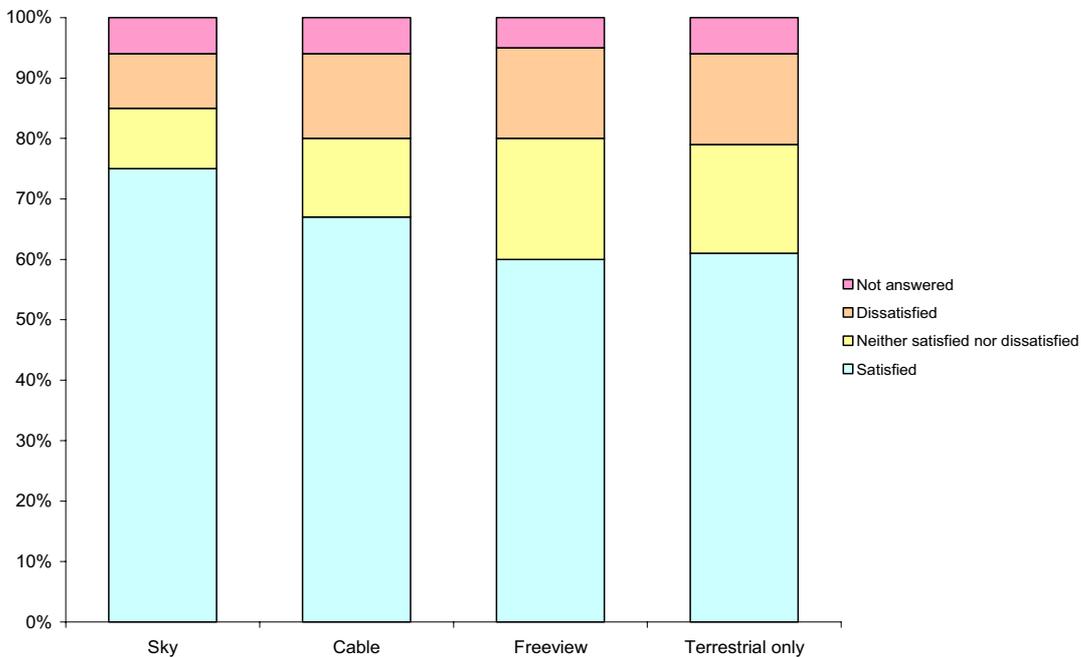
2 Satisfaction with delivery of the PSB ‘components’

In broad terms, when we asked our survey sample about their satisfaction with television overall (in other words including multichannel provision where applicable), a majority (61%) said that they were satisfied, with 13% saying they were dissatisfied. Sky viewers were even more positive than the overall sample, with three-quarters saying that they were satisfied with provision (see Figure 5).

Figure 5: Satisfaction with television by platform

Question: Thinking about television in the UK as a whole, across the main channels such as BBC1/2, ITV1, Channel 4 and Five, as well as cable, satellite and digital channels...how satisfied are you with television available to you at the moment?

Base: all respondents



When asked whether they felt TV had got better or worse over the past five years, 26% of our survey sample felt that it had got better; 30% that TV had stayed the same; and 35% that it had got worse. Younger viewers and Sky and cable viewers are more likely to feel positive¹¹.

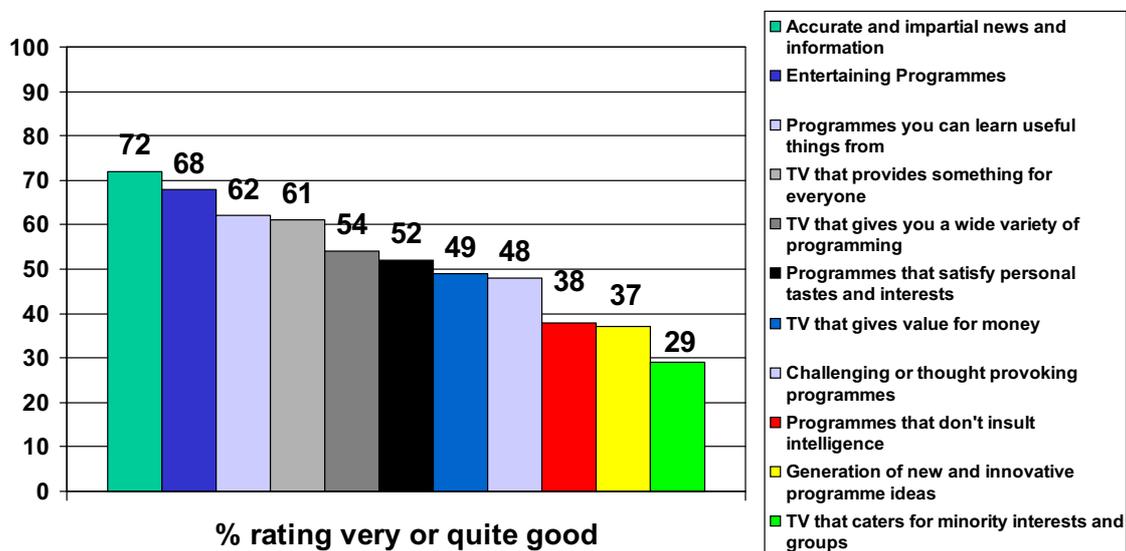
We then asked our sample about how good or bad they felt television as a whole was at providing certain types of programming. As Figure 6 illustrates, TV is seen as providing well in the arenas of news and entertaining programmes, but less well in areas such as programme innovation and programmes for minority interests and groups.

¹¹ These findings are similar to those reported by *The Public's View 2003*, which asks viewers about their opinions of television programmes over the previous year. According to these figures, viewers appear to be feeling less negative about TV than they have previously, with younger age-groups being more positive.

Figure 6: Satisfaction with television as a whole

Question: How good or bad do you think television as a whole in the UK is at providing each of the following?

Base: all respondents



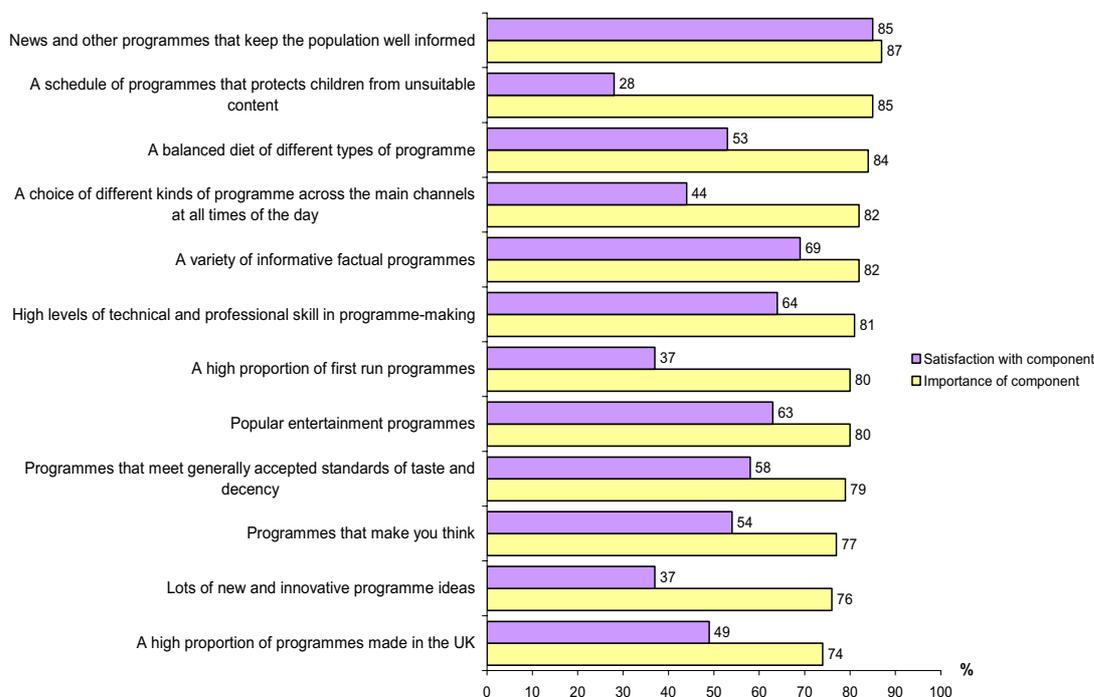
Source: Ofcom

These findings are echoed in responses to our questions about viewer satisfaction with the core components of PSB provision on the main terrestrial channels, as Figure 7 illustrates.

Figure 7: Viewer satisfaction with selected PSB components

Question: How well do you think that the main terrestrial television channels satisfy your requirement for each of the following?

Base: all respondents for views on 'importance'; those that said a component was important for views on 'satisfaction'



Source: Ofcom

This shows that levels of *satisfaction* are generally lower than the levels of *importance* which viewers attach to the components of PSB – even (albeit marginally) in the case of News. The discrepancy is particularly marked in the case of *a schedule which protects children from unsuitable content*.

Appropriate scheduling policy

This issue of inappropriate scheduling for children is one which is often raised in discussions with viewers. Deliberative forum participants expressed concern about the increasingly violent and sexual nature of soap opera storylines, and such views have been investigated in some depth in other recent research.

The ITC/BSC publication *Platforms and Channels* (2001) identified parental concern about 'inappropriate audiences' being fed from one programme deemed to be innocent – for example, *Friends* – to something more controversial – say, *Eurotrash*.

Specific research about the watershed was published in October 2003¹². Concern was expressed by some viewers about inappropriate storylines in soap operas, with overly adult or distressing scenes being portrayed prior to the watershed. Participants felt that children

¹² *The watershed: providing a safe viewing zone*, ITC, BSC, BBC, 2003

aged 8-12 were the most vulnerable to this type of television content. Those older 'knew it all already', and those younger were unlikely to understand.

ITC research into children's viewing habits¹³ asked about the viewing of soap operas, and discovered that many girls and mothers refer to them as 'bonding time', as they act as a springboard for discussion of real-life issues. In general, it is the mothers that don't watch the soaps that express most concern about their content.

Interestingly, in our sample there are few differences in response between parents and non-parents – parents are slightly more minded to place obligations on the terrestrial channels to ensure such protective scheduling exists, but apart from this there is no significant increase in concern from parents or decrease from non-parents. However, there are differences by age-band – those aged 16-34 are more likely to feel that such protective scheduling exists, with 52% feeling satisfied with what channels provide, whereas only 31% of those aged over 55 feel that this is well-provided.

Indeed, this view is backed up by *Public's View* research which routinely shows that younger viewers have a higher tolerance of channel standards than do older viewers.

Programme innovation

Another area of significant dissatisfaction in our survey and more generally across the qualitative research conducted relates to programme innovation. As we have seen earlier, programme innovation and origination is an area of key importance to viewers. While the much-berated formats of reality TV and makeover shows continue to do well in terms of viewing figures, viewers feel strongly that this type of programming is derivative, and that more could be done to create original programming.

28% of the overall survey sample¹⁴ didn't feel that the main terrestrial channels were providing adequate amounts of first run programmes. While this was not the majority view – 34% by contrast felt that there was an adequate amount, and 28% had no opinion – it is significant in that it is the highest level of 'active' dissatisfaction expressed with any of the components.

Representatives of specialist interest groups highlighted some parts of the schedule where more innovation could usefully be introduced, singling out daytime television with its 'captive audience' as a largely wasted opportunity. Those involved in lifelong learning initiatives felt that reality TV could usefully be harnessed to the realities of everyday life; 'proper reality TV would show what it's like to go to college with two young children'.

Programme diversity

Dissatisfaction is also expressed with the PSB components relating to diversity. Programmes for minorities, the regions, the religious, those interested in arts and so on all score low in terms of satisfaction. In particular, *programmes that reflect the needs and concerns of different ethnic communities* are seen as satisfactory by 20% of the overall sample but unsatisfactory by 20%. Only 15% of ethnic minority audiences are satisfied, with 32% saying that they are dissatisfied with such provision.

¹³ *What Children Watch*, ITC June 2003

¹⁴ i.e. not just those that had earlier rated this element as 'important'

These components relating to diversity are elements where it appears respondents do not feel necessarily qualified to give an opinion – these areas had the highest levels of ‘neither/nor’ responses, with around 40% of the overall survey sample answering in this way.

News and entertainment

Finally, *news and other programmes that keep the population well informed* is both most important to people (87% rating it as very or quite important) and also most satisfactorily delivered (85% of those that felt it important rating themselves satisfied).

It is of note that while 56% of the overall sample are satisfied with the provision of entertainment programmes, younger viewers appear to be better served than older ones – 64% of 16-34 year olds felt that these were well provided compared to 51% of those aged 55 or more.

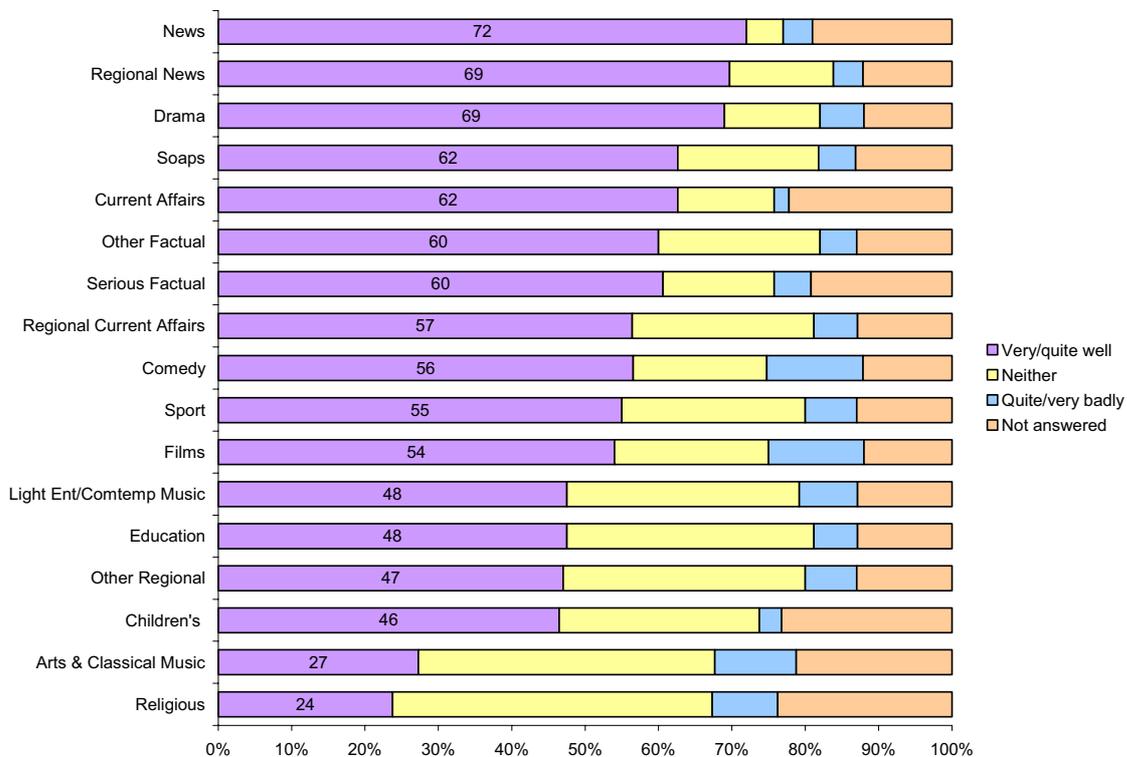
Satisfaction with genres

In addition to these elements of PSB programming, our survey also asked viewers to consider how well the main terrestrial channels satisfied their requirement for each programme genre.

Figure 8: Viewer satisfaction with the delivery of genres on main terrestrial channels

Question: How well do you think the main terrestrial channels satisfy your requirement for each of the following types of programme?

Base: all respondents



Source: Ofcom

As shown in Figure 8, there is broad satisfaction with the majority of the genres. Once again, news is top, and interestingly, regional news ties with drama for second place. Sport and films come somewhat lower down the list, which may be a result of people feeling that their requirement is also satisfied by specialist channels.

Those genres which score lower tend to be those where viewers opt out of having an opinion rather than being actively dissatisfied with provision: for example, only 27% of viewers feel that terrestrial channels satisfy their requirement for arts and classical music, but a further 40% have no opinion either way.

More specific issues to do with particular genres were also explored in the survey. We were keen to discover more about people's views of news, current affairs and factual programming, drama, children's programmes, and last but not least the arena of regional programmes.

News

Figure 9

Question: how much do you agree or disagree with each of the following statements about news programmes on television?

Base: all respondents

<i>% of viewers either strongly or quite agree</i>	All	16-34	35-54	55+	ABC1	C2DE	Sky	Freeview	Terrestrial
<i>Statement</i>									
<i>When I watch the news, I rely more on the main bulletins on the networks than on the 24-hour news channels</i>	63	59	64	68	67	61	60	69	77
<i>Now that there are dedicated news channels available, there is less of a need for news bulletins on the mainstream channels</i>	11	12	11	10	11	12	20	9	8
<i>For breaking news I turn first to a specialist news channel or the Internet</i>	19	24	19	15	20	19	33	24	8
<i>It is important that viewers have the choice to watch news provided by a range of different suppliers e.g. BBC, ITN, Sky News etc.</i>	67	65	67	69	69	65	77	74	66
<i>You can trust the information and analysis provided by British television news to be accurate and impartial</i>	53	53	50	55	52	53	54	63	56

Source: Ofcom

Given the importance given to news on the main channels, it is perhaps not surprising that a majority of our survey sample (63%) say they still rely primarily on the main network bulletins for their news needs, even in Sky homes (60%). Few argued that dedicated news channels or the Internet were adequate replacements. That said, it is worth noting that around 1 in 5 say that they now use 24-hour news channels or the Internet first to check on breaking news,

and 1 in 10 agree that with the advent of dedicated news channels there is less need for news bulletins on mainstream channels¹⁵.

In terms of viewing habits, Sky viewers are of course more likely to be more positive about the benefits of, for instance, 24-hour news, with 33% saying that for breaking news they turn first to a specialist news channel or the Internet, compared with 8% of terrestrial viewers and 24% of Freeview audiences. However, younger viewers in the 16-24 age bracket are not significantly more likely to do this: 21% said they would, compared to 24% of the wider 16-34 age-group and 19% of those aged 35-54.

Sky subscribers remain keen to see news bulletins on the mainstream channels, with 50% disagreeing that there is less need for them now that there are dedicated news channels available (although 20% agree). Unsurprisingly, terrestrial viewers are more firmly supportive of the traditional bulletins, with 63% disagreeing that there is less need for them. Sky viewers are also keen for viewers to have a choice of news providers, with 77% finding this important as compared to 66% of terrestrial audiences.

Viewers are strongly supportive of two fundamental tenets of British TV news – the need for viewers to have the choice to watch news provided by different suppliers, and the importance of each main channel having at least one news bulletin during peak viewing hours (73% agree).

However, there are some latent concerns. A minority (18%, and 22% of ABC1s) believe that *news on television has been dumbed down to an unacceptable level*, and a more significant 28% now believe that there is *too much promotion of channels' other programmes on news bulletins*.

Of more concern is the fact that only 53% believe that *you can trust the information and analysis provided by British television news to be accurate and impartial*. While this is nonetheless a majority view, it is not a resounding endorsement of the status quo¹⁶. 'Accuracy' and 'impartiality' were separated out in the questions asked by *The Public's View 2003* research, and it would appear that it is impartiality that is of concern, as 90% see News programmes to be accurate always or most of the time, while only two-thirds (67%) feel that they provide fair and unbiased UK news.

Current affairs and factual

There is no consensus from our survey sample over whether there is enough serious current affairs on the main channels: viewers are split with just under 1 in 4 feeling that there is enough provision, and similar numbers feeling that there isn't. As might be expected, ABC1s are more likely to feel that there is a shortage (28% compared to 20% of C2DEs) but still 24% feel that there is no shortage.

However, when it comes to factual programmes, there is a majority view that there should be more history, science and nature documentaries on television, with around 40% of viewers in agreement, and 1 in 8 disagreeing. In the deliberative forums, many felt that documentaries

¹⁵ See also *New News, Old News*, ITC 2003 for content analysis, audience research and industry views into the current position of TV news. The research found that 'new' forms of news such as 24-hour news channels have a greater reach amongst certain ethnic minority groups as other more traditional news forms decline.

¹⁶ The survey was carried out at the end of November 2003, when although the Hutton Report had not yet been published, the issue of BBC impartiality had been on the public agenda for some months.

were generally of high quality, and an area in which television in general did well. Particular praise was given to the use of new technology to improve the immediacy and impact of historical and scientific programmes: 'It used to be you'd see a few bones in books. Now you can really be there'.

Support for subject areas that are populist in nature is evident, with broad agreement that it is good for current affairs programmes to cover accessible stories in order to interest the public. However, a significant minority of between 9 and 12% disagree with such a policy.

Drama

Drama programmes are highly valued by our survey sample and, generally speaking, they are satisfied with what they see. Indeed, 66% agree that, *in spite of the wide range of channels now available, the best drama programmes are still shown on the main channels*. In the deliberative forums, there was strong endorsement of the quality of UK dramas, and it was felt to be an area that British programme-makers excelled in.

However, there is some evidence of frustration with a perceived lack of innovation on the part of the terrestrial channels – 46% of all viewers, and nearly 60% of men – agree that there are *too many soaps, police and medical dramas on TV these days*¹⁷.

42% complain that they are getting *a bit bored with the same old series appearing every year*, although naturally enough this is a factor of age – 24% of 16-34s disagreed with the statement while only 15% of those aged over 35 did.

Over one quarter of those aged 16-34 feel that *British drama could learn a lot from some of the American programmes* shown on Channel 4 and Sky such as *ER, Six Feet Under, Sex and the City, and The West Wing*. However, this remains a minority view overall (18%).

Children's programmes

A majority of viewers surveyed agree that all the main terrestrial channels should have an *obligation to show children's programmes* (51%), that a high proportion of those programmes *should be made in the UK* (56%) and that they would prefer to choose a channel *that shows children's programming without adverts* (51%)¹⁸. Deliberative forum participants praised the quality of terrestrial TV's children's programming, which were felt to uphold values that parents wanted to be promoted¹⁹.

Given the appreciation of children's programmes being shown without ads, it is perhaps unsurprising that the BBC's new digital children's channels are largely seen to *bring something new, different and valuable to the range of programming available for children*. However, there is also a belief among cable and satellite viewers that *cable and satellite channels like Nickelodeon, Cartoon Network and The Disney Channel are now a much better source of children's programmes than the main networks*, with 32% agreeing and 20%

¹⁷ Unsurprisingly, given the difference in viewing habits between the genders, 35% of women disagree.

¹⁸ While this latter figure is perhaps not as high as might be expected, only 2% disagree with the statement – a fifth are undecided, and a further sixth did not answer the question.

¹⁹ On the other hand, in *What Children Watch*, children were asked what appealed to them about American programming. They felt that it tended to be more multi-layered, have more sophisticated humour, better production values and be more inspirational.

disagreeing. Freeview audiences thought the opposite, with 10% agreeing and 23% disagreeing.

Specialist interest interviewees with responsibility for children tend to feel that the younger age-groups are reasonably well catered for with a range of educational and entertaining programmes. There is more concern about provision for 10-12 year olds, who are described as tending to migrate (prematurely) onto a diet of soaps, MTV and (some) adult programming. As we saw above, there is concern about some of this evening scheduling, with children being exposed to some unsuitable content, particularly in soap operas.

The message that emerges is not that viewers want inappropriate material banned, but that they would like more adequate signposting. This would ensure that as parents or guardians they can make a decision about whether the child then views the programme. As one deliberative forum participant noted, a quality programme for her is equated with peace of mind in this respect: 'something I could leave my grand-daughter to watch quite happily'.

Regional programmes

Figure 10

Question: How much do you agree or disagree with each of the following statements about regional programmes on television?

Base: all respondents

Statement	% of viewers	Agree	Neither agree nor disagree	Disagree	Don't know/ not answered
<i>It is important for ITV1 as well as the BBC to broadcast regional news</i>		75	7	3	15
<i>Television is an important source of regional news</i>		69	12	5	15
<i>Other than the news, regional programming is of no interest to me</i>		16	25	43	16

Source: Ofcom

As Figure 10 shows, there was solid support in our survey for the *concept* of regional television, and for regional news in particular. Nevertheless, a significant proportion of viewers opt out of commenting on how satisfied they are with actual delivery of regional programming by the terrestrial channels, which may imply that this is an area of programming they do not engage in, or that regional programming as a genre is not widely understood.

Plural supply appears to be important to viewers. Three quarters of viewers (and 81% in Northern Ireland) agree that it is important for ITV1 as well as BBC ONE to broadcast regional news – and only 3% disagree: a consistent response across age and socio-economic lines. This view was backed up in the deliberative forums, and also in specific research on the subject of regional television conducted by the ITC/BSC and published in July 2002 (*Pride of Place*). Viewers were clear that they wanted regional programming to continue to be provided by both the BBC and ITV1.

This emphatic desire for more than one supplier of regional programming is borne out by responses to another of our survey questions which asked respondents to say which channel

should have an obligation to show regional programming. ITV1 and BBC ONE are given an equal responsibility, with just over 40% feeling they ought to have such a duty, just over a third nominating BBC TWO, and a quarter Channel 4. Less than 1 in 5 place an obligation on Five.

Nearly 70% agree that television is an important source of regional news, a view backed up by *Public's View* research which consistently ranks regional news highly.

The majority of viewers feel that the regional news currently available is local enough. However, a significant minority feel that regional news on ITV1 and BBC ONE isn't adequately local (17% and 23% respectively). These views will of course be dependent on the specific opt-out provisions of each region, with some having a number of local opt-outs and others very few.

Lastly, although regional current affairs and (particularly) other sorts of regional programming feature near the bottom of the list of genres people feel are important either to them or to society, relatively few people (16%) claim that they are uninterested in any regional programming other than news. This might suggest a gap between people's expectations for such programmes, and the quality and range of current provision.

This point is further underlined by the fact that a high proportion of viewers in our survey, when asked about their satisfaction with the delivery of regional programming in general, feel unable to comment. 40% had no opinion either way about whether channels were doing well in their provision of such programming; 30% felt they were doing well, and 16% that they were doing badly. This would appear to signal that a number of viewers, while believing that regional programming ought to have its place within the schedules, aren't themselves particularly engaged with it.

There may be a number of reasons for this lack of engagement, including the production standards or more precisely the available budgets for regional when compared to network productions, the geographic boundaries of the region and the extent to which the local area has a recognisable identity or not, the scheduling of regional programmes (often against the popular soaps), and a lack of signposting and promotion of such programming, not least in listings pages which tend to give few if any details of the regional offerings. These issues shall be investigated further in Phase 2 of our research.

In *Pride of Place*, viewers regarded quality as of paramount importance, and ultimately more central than quantity. Overall, most said that they would accept fewer regional programmes if these were guaranteed to be better resourced.

Our qualitative work raised the possibility from some viewers that regional representation on *network* schedules (ensuring that productions are set in locations across the UK) may be a more enduring way of reflecting the Nations and regions of the UK onscreen. While such programming of course already exists, some concerns were raised in the deliberative forums and by specialist interest interviewees about negative stereotyping of certain Regions and Nations, and that more could be done to ensure that regions and Nations were accurately portrayed.

3 Opinions of channel performance

We asked our survey sample and the participants in deliberative forums to spend some time thinking about which channels are best placed to provide the various components and programme genres relating to PSB. We also asked them for some general views on the strengths and weaknesses of the BBC, ITV1 and Channel 4.

Figure 11: Viewer expectations of channel obligations

Question: Which of the main terrestrial channels, if any, do you think should have an obligation by law, that is they must provide, each of the following?

Note: components in black typeface were added to judge the importance of mass/ mainstream entertainment in relation to the other core elements of PSB

Note: % scores based on respondents saying one or more channels should provide

Base: all respondents

Component type	Component	% of survey thinking channels should provide
Range and balance	A balanced diet of different types of programme (both general entertainment and other types) within the peak viewing hours of 6pm-10.30pm	80
Social values	News and other programmes that keep the population well informed	80
Quality	A high proportion of first run programmes i.e. not repeats	79
Range and balance	A wide variety of different programme types e.g. news, sports, documentaries, entertainment, religious, arts etc.	79
Quality	Programmes that meet generally accepted standards of taste and decency	79
Quality	A high proportion of programmes made in the UK	78
Social values	A schedule of programmes that protects children from unsuitable content	76
Quality	High levels of technical and professional skill in programme- making e.g. strong acting, good locations etc.	75
Social values	A variety of informative factual programmes	74
Quality	Lots of new and innovative programme ideas	72
Social values	Programmes that people will feel they have learned something from	72
Social values	Programmes that promote fair and well-informed debate	72
Social values	Live coverage of major political/social occasions e.g. Royal weddings, Golden Jubilee, the budget etc	71
Social values	Programmes that make you think	71
Social values	Programmes that promote or support social action campaigns e.g. <i>Crimestoppers</i>	70
Diversity	Representation of wide range of different political and social viewpoints	69
Social values	Programmes that protect our national heritage and keep traditions alive	67
Diversity	Programmes that reflect the needs and concerns of different regional communities within the UK	67
Social values	Programmes that promote or support educational and other public initiatives e.g. The Big Read or Restoration	65
	Live coverage of major or global sporting events e.g. the World Cup or the Olympics	64
	Live coverage of other popular sporting events e.g. Premiership football, Formula One or the Grand National	61
Social values	Specialist educational programmes for children and adults	61
Diversity	The promotion of awareness and understanding of different communities	59
Social values	Programmes that promote participation in, and enjoyment of, the Arts	54

Diversity	Programmes for minority interests	48
	Popular programmes from America	46
Diversity	Programmes that reflect the needs and concerns of different ethnic communities within the UK	44
Diversity	Programmes that reflect the needs and concerns of different religious communities within the UK	44
Diversity	Programmes that reflect the needs and concerns of other minority groups such as the Countryside Alliance and gay people	37

Source: Ofcom

As Figure 11 indicates, the percentage of viewers in our survey who felt that terrestrial broadcasters should be obliged by law to show various types of programme closely matches the percentage of viewers who found such types of programming important. For example, news and information, balanced scheduling, and original production all feature highly, with obligations to show programmes reflecting minority interests least popular. In broad terms, range and balance, quality, and social values were paramount, with diversity components trailing significantly.

There is, therefore, seemingly less appetite from viewers for minority programming to be ring-fenced on terrestrial channels. The message again seems to be one of the need to ensure a high quality, balanced, informative and innovative TV system, rather than one which caters for and protects specific tastes and interests.

Results from the deliberative forums show that most participants, after having spent the day discussing the subject of PSB and questioning TV executives from the main broadcasters, felt that channels should retain their regulatory obligations. If change had to occur, then there should be a slight relaxation on obligations across the board. In other words, it was felt that no single channel should be permitted to rescind its PSB obligations, as competition between channels across a variety of genres was seen as a necessary condition of programme quality. While it was felt that, given the licence fee, the BBC rightfully should bear the highest level of commitment, most thought it would not be a good idea for it to carry all PSB obligations:

- € 'I don't think it's right to put boundaries on the BBC and not on others. Otherwise it'll become a bit of a dinosaur. It'd never be a viable business. I think reduce [PSB] a bit across all of them'.

As another participant put it, ITV1's focus would change if PSB obligations were loosened:

- € 'Within a certain time span they would gradually peter out regional broadcasting ... and spend more money in the jungle!'

Most of our survey respondents also feel that the terrestrial channels should continue to provide a mixed schedule that provides a good variety of programming types. Within this overall framework, different channels are given different requirements, as described below.

These are in large part simply a reflection of what is currently being shown by each channel: it would be surprising to find that Five, for example, is being tasked with more obligations for programming than BBC TWO. It is nonetheless illuminating to see the relative variations in regulatory obligations that viewers place on the terrestrial players, as they provide an insight into how each channel's role is perceived.

The BBC

Overall, BBC ONE is apportioned more 'obligations by law' than the other terrestrial channels. News provision, taste and decency, a balanced diet of programmes and UK first-run programmes were each felt by over 70% of viewers to be elements that should appear on BBC ONE: no other channel scored so highly. In the deliberative forums, there was a strong sense that the BBC 'is ours', and therefore that it has special responsibilities to uphold.

In terms of programme genres, too, it has the greatest expectations from viewers. A majority feel that it should be obliged to show a number of genres, although some of the 'minority' subject areas are seen as more appropriate for BBC Two to provide.

BBC One also appears to be seen as the mirror for the nation – 60% of viewers feel it should show live coverage of major events, as distinct from 45% feeling that ITV1 should be similarly charged. Freeview viewers are more inclined to expect ITV1 to show this type of coverage, with 57% feeling that ITV1 should show it, although Sky and cable viewers echo terrestrial responses.

A clear picture is also given of BBC Two's remit – educational programmes providing food for thought and taste and decency are the key elements expected. Translated into genres, Education, Serious Factual, and Arts and classical music are all areas that BBC Two is seen to bear most responsibility for.

In broad terms, our initial research appears to indicate support for the licence fee. When we asked our survey sample for their views about the 'general idea' of the licence fee, more people appear to be in favour of the licence fee than are against it: 46% support *the general idea of a licence fee*; 32% do not, and 11% don't know (10% did not answer the question).

ITV1

When we asked specific questions about ITV1's provision of programming, our survey sample indicated that they are prepared to give the channel some leeway in maximising its audience. While there is by no means a large majority in favour, more people agree than disagree that ITV1 should *concentrate on popular entertainment programmes, dramas and soaps, rather than try to do everything* - 34% to 27%. More starkly, 45% agree that *ITV1 should be free to do whatever it feels it needs to do so that it can continue to attract a large audience*, against 18% that disagree. There is little variance across the demographic subgroups. Sky viewers respond in a similar way to terrestrial viewers, although they are more likely to feel that ITV1 should be free to focus on more entertainment-oriented programming: a view which serves to underline the more entertainment-oriented perspective of Sky subscribers.

It is of note that those viewers which switch to ITV1 first, i.e. those who could tentatively be deemed positive towards ITV1, agree *more* with the statement that ITV1 should be free to maximise its audience share (59%).

However, notwithstanding these responses indicating some acceptance of ITV1's commercial imperatives, the majority of survey respondents want to retain *regional news* (71% v 4%), *a full range of regional programming* (63% v 6% against), and *children's programming* (68% v 2%), in response to questions on these issues.

And expectations from viewers about what the channel ought to be 'obliged to' provide closely follow the pattern of viewers' expectations of BBC One, albeit a few percentage points lower.

When the point was made at deliberative forums that it was increasingly difficult for ITV1 to maintain both its public service requirements and a commercially-focused peaktime schedule, viewers felt that rather than go for an either-or approach, it would be better to loosen PSB requirements slightly across the board rather than allow ITV1 to leave the PSB stable.

There was a strong undercurrent of feeling that, despite the many downsides of competition and rivalry between the channels in terms of risk aversion and scheduling battles, 'competition for quality' was a very necessary element of the broadcast mix.

Channel 4

Channel 4's remit seems to be less clear to the general public, and there are few strongly-held views about specific programming obligations for the channel: the only two elements of programming that over 50% of our survey respondents thought it ought to be expected to show were *programmes that meet acceptable standards of taste and decency* and a *schedule that protects children from unsuitable content*.

54% of the overall sample felt that Channel 4 *does a good job of catering for audiences other channels don't cater for*, and 51% that it is *noticeably more innovative and risk-taking* than the other channels. Younger audiences, London audiences and also ethnic minorities are more prone to agree with these statements, with those aged over 55 more likely to disagree.

Agreement levels about Channel 4's provision for different audiences, its risk-taking and its different approach to subjects all rise significantly if the respondent is someone who turns to Channel 4 first when they are making their programme choices.

Channel 4, then, appears to have pockets of strong support from particular sections of society: it seems to be perceived as providing well for particular groups rather than for the population as a whole.

Five

Finally, Five is classed as having only one component of PSB that over 50% of respondents feel is expected of it: the protection of children from unsuitable content. Two other elements were felt by between 40% and 50% of viewers to be important for Five – *programmes that meet generally accepted standards of taste and decency*, plus the requirement for a balanced diet of programming.

Five does not come fifth in all matters of PSB provision however: it is given obligations to provide arts and classical music by the same number of people as ITV1.

As mentioned above, these survey questions largely capture viewers' opinions on current provision rather than definitively map out the regulatory requirements of each channel. In this light, it is positive news for Five that its forays into arts programming have been noted by respondents. As one deliberative forum participant noted: 'Five used to be about porno films

you'd never heard of. Now it's highbrow arts with a bit of pornography at the end of the evening'.

Summary

To a large extent these views on the obligations by law that ought to adhere to individual channels are simply a mirror of what viewers see as being currently available. But this in itself is useful to know: that the BBC remains charged with most obligations; that ITV1's pattern of must-show programming follows that of BBC ONE, but with significant numbers also supporting a more entertainment-led schedule for the channel; that Channel 4, along with Five, is not seen to require significant regulation beyond the 'hygiene' issues of taste and decency and the protection of children.

This is borne out by other questions in the survey which asked viewers to rate each channel's provision of programme genres. Broadly, BBC One and ITV1 were seen to perform well in many of the genres most related to their output: news, sport, soaps, children's, regional news and drama. BBC Two was seen to be performing well in education, serious factual, arts and classical music and current affairs. Channel 4's areas of strong performance (relative to other genres) were seen as news and films in particular, but also comedy, serious factual and drama. Five was likewise seen to be best at providing films and news, and also sport, drama and soaps.

The role of specialist channels

There appears to be a strong appetite by viewers from all platforms for terrestrial channels to provide *between them* mainstream, inclusive, high quality programming. For example, as we have just seen, ITV1 is expected to follow broadly similar social and quality obligations to BBC One. And as indicated earlier, 75% of respondents agreed that ITV1 should broadcast regional news as well as the BBC. Even among Sky and cable viewers who might be expected to extol the benefits of the multichannel system, there is a strong belief that terrestrial programming should provide something for everyone.

When asked in the survey whether any of the key components of PSB would be better provided by specialist channels, there was little variance between responses from Sky and terrestrial viewers, indicating that digital audiences are perhaps not yet ready to think radically about any significant reduction in programming obligations for the terrestrial channels.

Our research throws up a more mixed message as questions become more 'granular' or specific to particular genres, however. Survey results indicate that a significant minority of viewers are less concerned about minority subjects becoming the province of specialist channels: fully one-third said that such programming would be better provided by specialist channels. Again, there are only small differences between responses from terrestrial and digital households: while the latter are slightly more in favour of the specialist channel for such types of programming, the difference is of only a few percentage points²⁰.

When asked about particular genres, there is more discernable difference between terrestrial and digital views, although again overall responses remain firmly supportive of the status

²⁰ The only gap wider than this was in response to the provision of religious programming, where 38% of Sky viewers thought this to be better provided by a specialist channel compared to 29% of terrestrial viewers.

quo. Around one in six terrestrial viewers felt that sports, arts and classical music, and religious programmes would be better provided on specialist channels, while one in four digital viewers feel similarly.

The research conducted so far does not enable us to draw any definitive conclusion about the reasons for some viewers beginning to be more accepting of the migration of specialist interest programming to specialist channels. Further examination of the issue is anticipated for Phase 2 of the review.

4 Changing habits, changing opinions?

The research that Ofcom has carried out for Phase 1 of the PSB review has examined the current position of television provision in the UK. It has asked the public for its views on the importance of various PSB components and genres, and for its satisfaction with current delivery of these elements by the channels.

As we have seen, there is broad agreement about a number of elements of provision – the importance of a scheduling mix, of the provision of news and entertainment, a call for high production values and more innovation. There is a desire for the current regulatory balance between terrestrial channels to remain, and, if change must occur, then for rules to be loosened slightly across the board.

There remains some uncertainty and ambivalence among viewers about the provision of programming for minority interests and groups, be they ethnic, religious, regional, or simply interests that are not part of mainstream culture.

Selected areas will be further examined in Phase 2 of the review, as we begin to move our gaze forward to see beyond present provision towards how the future of PSB might look.

To this end, it is important to look more closely at the views of those who are arguably more likely to be familiar with the changing technology, to see whether opinions and habits are indeed changing. We have therefore examined the views of 16-24 year olds (splitting these out where applicable between those who are parents and those who aren't), as well as the views of those in Sky and cable homes, to see what differences emerge in their responses to the survey.

Attitudes to television

Younger viewers (16-24 year olds) are just as likely as the overall sample to agree with TV's influential role in shaping public opinion about politics, and also about its normative role to help forge a better society through increasing understanding and tolerance.

When asked to make a 'hard choice' between different elements of programming, younger viewers followed the broad patterns of the overall sample, although they were slightly more likely to opt for variety rather than the mainstream. In other words, they do not appear to have significantly different views from the main sample as to which elements of programming are more important than others.

They are, however, more likely to see specialist channels as the best place for sports programming – around one quarter of 16-24 year olds see sport as best delivered in this way – although for other genres their desire to see genres on specialist channels matches that of the overall sample.

Turning to Sky and cable homes, while most views across the age-groups about the role of television do not differ significantly from those of terrestrial viewers, there are nonetheless some interesting differences in emphasis.

Sky viewers are less inclined than terrestrial viewers to agree that TV has a big influence on people's thoughts and behaviour (61% and 77% respectively), or that it should help promote tolerance and understanding of different lifestyles (54% and 70%).

However, the overall direction of responses is the same. Sky viewers are still in agreement that such aspects of TV are important, but they are less committed to them than terrestrial viewers. When Sky views are compared with the overall sample of respondents, they are closer to the norm of responses.

Sky viewers are just as concerned as terrestrial viewers about many other facets of TV provision. They are just as likely to feel that TV news coverage and TV more widely has a role to play in informing citizens, and that TV should make people stop and think, as well as help to increase understanding and thereby make a better society.

Their different responses in some areas may be an indication of a feeling that TV is taking itself too seriously. Sky viewers were more likely than terrestrial-only viewers to find important those programmes that appeal to most people most of the time, as well as popular entertainment.

In line with a more entertainment-focused view than terrestrial viewers, when respondents were asked to make some 'hard choices' between different types of programming, Sky viewers were more likely to opt for more broadly populist entertainment than specialist fare. But they are just as keen as terrestrial viewers that the main channels show a balanced diet in peak-time, and more keen to see innovative, first-run, programmes on these channels.

Thus, while there are some indications of changing opinions – cable and satellite viewers seeing more possibility of some genres being catered for by specialist channels than do terrestrial viewers – there is also evidence that viewers of pay-TV platforms are just as wedded to 'traditional' PSB values and schedules as terrestrial viewers.

Switching on

Figure 12: Channels turned to first

Question: On an average day, which is the **first** channel you turn to, to see what's on?

Base: all respondents

	Total (%)	Sky/cable	Freeview	Terrestrial only
BBC1	48	43	59	56
BBC2	5	2	7	8
ITV1	22	25	20	22
Channel 4	3	1	3	5
Five	1	0	1	1
Sky One	2	4	1	
BBC News 24	1	2	2	
Sky News	1	3	0	
Sky Sports	1	4		

Source: Ofcom

As Figure 12 shows, while the majority of digital viewers still turn to the terrestrial channels first on an average day to see what's on, they also make some use of the additional digital channels available.

Most Sky viewers are likely to turn to BBC One first. Next comes ITV1, with BBC Two and Channel 4 being the first port of call for only 2%. Terrestrial viewers are almost as unlikely to

turn to these latter channels first. Five is turned on first by only 1% of terrestrial viewers, and none of the Sky or cable homes. This ranking is similar to that which emerges when viewers are asked which channel they would choose if they could have only one, a question asked yearly in *The Public's View*.

While the picture is one of predominant use made of BBC ONE and ITV1 as the initial viewing channel, more use is made of additional channels at times of national importance or breaking news. 17% of Sky viewers turn first to Sky News for news of an election or royal wedding, with 8% going to BBC News 24, the same number as Freeview viewers. These numbers rise when news of a moment of crisis unfolds, with 26% of Sky viewers going to Sky News, and 11% to BBC News 24, compared with 14% of Freeview viewers²¹. Younger viewers, too, are more likely than older demographics to opt for 24-hour news channels, with 16% saying they would choose Sky News first.

Although the consumption of news from 24-hour news sources is significant, there remains little appetite from multichannel viewers to use foreign news sources for such types of breaking news. CNN gets 3% of Sky and cable viewers, and Fox News gets none.

Methods of selecting programmes

Figure 13: Main source of programme information

Question: Which of the following would you say is your ONE main source of information about programmes?

Base: all respondents

Main source	Total (%)	Sky/cable	Freeview	Terrestrial	Internet users
TV listings page in newspaper or supplement	39	31	46	47	39
TV listings magazine	33	35	39	35	33
The Internet	0	0	0	0	0
Onscreen listings guide	8	23	2	0	8
Teletext/Ceefax	3	2	3	5	3
Flicking through the channels	3	3	1	3	3
From other people by word of mouth	0	0	1	0	0
Not answered	13	7	7	9	13

Source: Ofcom

While there appear to be few differences of opinion across the survey sample about the overall purpose and shape of PSB on television, *habits* of programme selection do differ across the platforms, as Figure 13 indicates.

In part this is an outcome of the fact that multichannel homes have an electronic programme guide (EPG) as one of their tools, and partly because cable subscribers receive dedicated listings magazines from their platform provider.

²¹ See also *New News, Old News*, ITC 2002 for habits of 'new' news consumption

The main source of information about programmes for terrestrial homes, according to our survey sample, are TV listings pages or newspaper supplements, followed by dedicated listings magazines. This is reversed in Sky and cable homes, with 35% using dedicated magazines as their source, and 31% using newspaper guides.

Flicking through channels is the preferred route for finding programming for only 3%, be they digital or terrestrial viewers. Whilst 16-24s are arguably more casual in their viewing selection, only 4% claim to watch programmes primarily by just flicking through the channels.

However, qualitative evidence suggests that such surfing may be much more prevalent than these responses indicate. Indeed, when asked whether they *ever* flicked through channels as a way of finding programmes, 50% of the overall sample said they did – tying in second place with using TV listings magazines.

When the survey sample was asked specific questions about how programmes are selected, it emerges that younger viewers and people in digital TV households are less likely to plan their viewing. For example, while only one in 6 of the overall sample agreed that they tended to switch on the TV and watch what was available rather than plan their viewing, nearly one in 4 of those aged 16-34 did. This rises to nearly 30% of young people aged 16-24 (although over 50% disagreed), compared to 1 in 11 of those aged over 55 who choose their programming in this way. Viewers in Sky homes were even more likely to choose their viewing like this, with 1 in 2 making choices this way.

In the deliberative forums, many participants from multichannel homes noted that they flicked through channels in order to find out what to watch. Indeed, one woman in Belfast defined 'quality' as a programme that you wanted to stay with until the end – she said there were very few programmes that she now watched in their entirety.

But younger people and those in multichannel homes are not necessarily that much more confident about the media world of increased choice: younger respondents are just as likely to feel that *it is harder to keep up to date with all the choices now available* as the overall sample. And Sky viewers are particularly concerned, with 42% saying that they find it harder to keep up to date compared to 28% of Freeview viewers.

However, in some contradiction, Sky viewers also say they aren't overwhelmed by programme choice: 83% say that they usually have *access to enough information* to be able to choose what they want to watch, only slightly fewer than the 87% of terrestrial viewers who feel this way.

Summary

This research into the views and stated behaviour of the viewing public indicates that while there is less variance in attitudes to the role of TV than might be expected, there are nonetheless some differences of *habit* between the general population and those with more proficiency and awareness of digital television.

It is a question for further exploration as to whether these changes in habit are likely to lead to changes in attitude, or whether an increased facility with digital media has no such effect; or indeed, as some indications from qualitative work suggest, may even serve to strengthen the requirement for PSB content on the main television channels.

Endnote

This Phase 1 audience research has described the current views of the British public about the nature and state of PSB provision, using a variety of research tools.

Its purpose has been two-fold:

- € To set out the range of viewer opinions for comment by third parties as part of the consultation process.
- € To clarify which areas of viewer opinion would benefit from additional analysis and examination.

Returning to the four key areas of PSB provision, our research has indicated the following.

Social values

It appears that there is a strong commitment to the role of terrestrial television as a force for societal cohesion: an opinion held consistently across age, socio-economic profile, type of TV platform, geographic location and so on. Television has a 'duty of care' to its viewers, especially children, and its viewers feel that scheduling policy should reflect this.

Range and balance

A mixed, balanced range of programmes is what viewers say they want. Balanced schedules are a critical prerequisite for this. There is some concern that television pays insufficient attention to the structure of people's daily lives, and insufficient respect to the audience, by inappropriate or overly-competitive scheduling.

Quality

Production quality is very important to viewers, as is the provision of original, UK-made programming. There is some feeling from viewers across the research elements that programme innovation is on the wane, with particular dissatisfaction expressed at derivative programme formats.

Diversity

Programmes dealing with minority interests are not as highly valued as other elements of PSB by most viewers. Rather, emphasis is placed on encouraging cohesion through the inclusion of minority interests and groups *within* mainstream programming rather than developing separate programmes for specialised interests or ethnic groups. There is also some indication that specialist channels are seen by some as the best place for such programming.

Ofcom welcomes views from interested parties on all these elements, as it undertakes further research into the views of television audiences about PSB.