November 2014

2014 PSB Review

An investigation into changing audience needs in a connected world
Conducted by Ipsos MORI for Ofcom

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The media landscape continues to change rapidly. Since the last Public Service Broadcasting (PSB) review (2007/2008) there have been significant changes, including the completion of digital switchover, the launch of BBC iPlayer and other on demand services, and a significant rise in broadband access. These changes are having a substantial impact on the way people access content and how they choose what to watch, which in turn has implications for PSB.

Ofcom commissioned Ipsos MORI to conduct a programme of qualitative and quantitative research for the third PSB review. The two overarching research objectives were:

- to explore what UK citizens and consumers want from PSB now and in the future; and
- to identify differences in views between age groups, life stages, and other demographic groups.

This research report draws on two sources. First, a UK-wide quantitative survey among people aged 16+ investigating their attitudes towards television, the internet and specifically, public service broadcasting now and in the future. Secondly, a series of day-long deliberative workshops with people aged 18+, and two groups with young people (16-18), all with similar aims.

Television content in context

People continue to value the role that television plays in society, although the internet has become significantly more important since the last review.

Television remains the most important source for a range of different activities and pastimes, particularly as a source of news. However, the internet has grown in importance and is now the most valuable media source for finding out about people who share similar interests and hobbies, and discovering new things.

Overall, people are now just as likely to agree that the internet has an important social role to play (74%), as they are of television (75%); and to agree that the internet should be available to everyone (80%) compared with access to television (78%).

Technology is changing the way people select and engage with content; it has given them greater choice, enabling them to match what they view more closely to their personal preferences.

People, especially younger age groups, are becoming much more selective about the content they consume, using new ways to search for content such as on demand service menus, being guided by recommendations from service providers, as well as searching for content that friends or family have viewed and recommended.

Many people are finding PSB-like content elsewhere.

People use PSB and non-PSB sources interchangeably, and feel they can find this kind of content outside the main PSBs. In some instances, people report watching programmes originally produced for PSBs on alternative channels such as Dave, while in others they are watching original content, such as on the Sky channels.

Furthermore, although the PSBs are seen as an important source of news, people are increasingly accessing non PSB news channels and online service providers, in addition to the PSBs, for their news consumption**.** Multi-sourcing news stories across a range of providers is considered to give a more balanced picture of events, although the BBC remains the cornerstone of news provision for most people.

Perceptions of public service broadcasting

The PSB purposes and characteristics are still seen to be important.

Although spontaneous awareness of public service broadcasting requirements remains low, the individual purposes and characteristics have broad appeal across all age groups.

The two educational purposes: "*Informing our understanding of the world*" and "*Stimulating knowledge and learning*" are viewed positively. For example, most people say the most important type of content provided by the five main channels is news, both for them personally (65% cite as most important), and for society as a whole (70% cite as most important).

Discussion of "*Reflecting UK cultural identity*" and "*Representing diversity and alternative viewpoints"* leads to more debate. Overall, people in the devolved administrations thought it was good to have programmes that reflect their local, regional and national identities, and felt that more could be done to ensure this; however, younger adults felt it was more important to represent diversity at the community level.

The importance and value of the PSBs varies by genre. The PSBs are seen as particularly important for factual content, sport and news. However, people are increasingly turning to PSB portfolio channels and commercial on demand services for soaps and dramas.

The PSBs as a group are losing some of their distinctiveness, particularly among younger audiences, as the market place becomes more crowded.

An ‘explosion of choice’ in content provision, along with an increasingly tech-savvy audience, has meant that people distinguish between good and bad content, not PSB and non-PSB.

Some people are becoming more focused on programmes than on channels/providers, and although all participants could name programmes which met the PSB purposes, not everyone could say which channels they were on. The value of television and the identity of the PSBs as a distinctive group increases with age.

While not everyone could see a clear distinction between PSB channels and others, most people associated BBC One, BBC Two, ITV and Channel 4 with good, high quality programmes.

People value content on the portfolio channels and do not see them as different to their main channel counterparts.

Some people, especially younger age groups, questioned why the PSB obligations did not apply to all services and platforms, as they didn't see them as different. In fact, for some these were seen as providing better, more engaging content, than the main five channels.

The BBC iPlayer is the most widely used and best known catch up service but some found it to be restrictive in terms of content availability.

Many people are now using the on demand and catch up services of the PSBs and other providers. Among those in the deliberative workshops, BBC iPlayer was the best known and most widely used catch-up service. However, some found it restrictive, particularly due to the perceived absence of a back catalogue, reducing the ability to 'binge' content, as provided by other commercial on demand services.

Typically, people found the non-PSB on demand services easier to navigate and more in line with their needs because of the range of programmes available. Key to the value of on demand services was the potential for 'series bingeing' on favourite programmes. Netflix was the most commonly mentioned commercial content aggregator.

Implications for future provision of PSB

The priority for providers should be to produce high quality public service content, with an increasing emphasis on the importance of originality.

As long as high quality public service content is created and everyone has access to it, people are less concerned about which providers broadcast it. The quantitative survey indicated that there is an increasing preference for original and experimental content over people's tried and tested favourites (up from 42% in 2007 to 60% in 2014).

However, there is concern, especially among older age groups, that some of the values of PSB will be lost if provision of content is left purely to the expanding marketplace.

This is particularly the case for content that is designed to achieve desirable purposes (such as *reflecting UK cultural diversity* and *representing alternative viewpoints*) but which might be expensive to make and have lower viewing figures.

As the way viewers consume content moves increasingly online and on demand, there is growing concern that viewers will be less likely to stumble across content that is informing and stimulates knowledge, and more likely to engage with content that is a self-selected diet of their favourite entertainment shows or recommendations from friends.

Opinion is increasingly mixed as to how content should reflect life in the UK and represent diversity.

Although half (49%) would most like to see TV programmes made in the UK reflecting life in the UK, there has been a rise in the proportion of people who would prefer to receive the best television content from abroad (if forced to choose), (from 22% in 2007 to 35% in 2014).

There is broad support for the provision of a wide variety of programme types, and this has increased further since 2007 (up from 59% in 2007 to 72% in 2014); however, there is less consensus regarding at whom this content should be targeted; the proportion who would prefer programmes to be targeted at mass audiences has increased from 21% in 2007 to 38% in 2014.

Future delivery of PSB content

On demand services are considered to be important, and people expect them to be available on different types of devices.

More than half (56%) perceive the provision of on demand or catch up services by the PSB providers to be important; even among those who do not currently use these services 27% still feel they are important. A similar proportion (55%) believe it is important that online and on demand services are widely available on different devices other than TV, such as smartphones, tablets and laptops.

However, most people resist the idea of a shift to on demand only PSB provision; even heavy users of on demand services expressed concern that some viewers may not be equipped to access PSB content if it's only available online.

Despite recognising that people's viewing habits are changing in response to market changes and technology changes, people are generally averse to radical change happening too quickly. When forced to choose, half (49%) would prefer scheduled television only, compared with 38% who would choose to view television only through an on demand service. A preference for 'scheduled-only' content becomes even more apparent when people are asked whether they would prefer news content to be provided only on scheduled television or only through on demand services.

From a 'citizen's perspective', people have concerns about access for those with low levels of media literacy, limited internet access, or limited devices with which to access on demand content. The more technically-minded also wonder whether broadband capabilities are reliable or fast enough to allow a complete replacement of broadcast TV.

There is also consensus that scheduled television is better suited to some genres of television, such as cultural or sporting events which bring people together to share the experience live.

Content enhancement features such as websites and smartphone apps are not widely used, and are perceived to be less of a priority than delivering high quality content.

While there is an appreciation of broadcasters' websites, use of these is mostly limited to news gathering. Other content enhancement features such as programme apps are seen by most people as 'nice to have' or 'gimmicky', and are not currently seen as a priority for the PSBs to provide. Overall, people struggle to envisage how the format and delivery of PSB content might evolve in this way in the future. The exception to this was the BBC news and sports apps, which some found very helpful when on the move.

Generational analysis

Age, and access to technology, are the key drivers of attitudes to PSB content and delivery, more so than national or regional differences or life stage.

Generational differences in opinion, attitude and habits towards public service broadcasting, and content more generally, are particularly distinct across the 2014 research. Three broad typologies emerged from the research, derived from attitudes and habits towards technology. These characteristics are predominantly influenced by the technological context in which people have grown up, itself largely a function of age.

Across these groups there is broad agreement on the value of PSB purposes and characteristics but there are differences in how people think these can be achieved. There are considerable differences in the consumption behaviour and understanding of PSB between these groups; however, on deliberation, most people across all the groups resist the idea of PSB content being provided only online.

- **Tech natives**: tend to be younger (typically aged c.16-30) and use multiple sources of audio-visual content, often online. They are less likely to feel that PSB regulation is relevant to the content they watch, and believe that market demand will continue to drive high quality content. Although they are the most likely to prefer an 'online only' world, many – particularly after deliberation – are hesitant about PSB being online only as they are concerned about the impact on society.

- **Tech learners:** tend to be middle aged (typically aged 30-55) and are more comfortable distinguishing between the PSB 'main five' and other channel providers. They are likely to use a range of devices and sources of content, but have distinctive purposes for each. The tech savvy in this group can imagine an online only world, but take an overall citizen perspective and are concerned about those who would not be able easily to access this environment.

- **Traditionalists:** tend to be older (aged 55+). Most are still highly reliant on the TV listings and predominantly use a television set to access content. The concept of PSB and a distinction between the main five and 'other' providers is more familiar to this group. There is an outright preference for a world which broadcasts scheduled TV only, with some concerned about the negative impact of online services on other members of society.

Table 1.1 Generations analysis	Context: accessing television content	TV and PSB content	Future of PSB content	Current delivery of PSB content	Future delivery of PSB content
Tech natives (typically aged c.16-30)	Likely to have multiple devices and use a diverse range of sources interchangeably. They do not feel they need a schedule and often use on demand and catch up services.	Less than half now think that the TV is their most important source for relaxing or entertainment. Many are more focused on programmes than channels or providers and some struggle to see why PSB requirements are limited to the first five channels.	Found the concept of PSB unfamiliar but placed a great deal of value on the purposes and characteristics. They expect global content and are more concerned by representation of different community groups rather than regions. Less likely to think regulation is needed to ensure that PSB-type content is provided (except for news).	Frustrated by PSB on demand services in comparison with providers like Netflix. BBC is seen as a bastion of high quality by some, but old fashioned by others. Although BBC Three is widely watched and valued, Channel 4 is associated with content that shows diversity.	On-demand only often seen as a change that wouldn't significantly affect them, but worried about the impact on society. Many felt that older people, or people without access to technology would miss out. Use apps but concern about broadcasters using apps, as a gimmick.
Tech learners: (typically aged 30-55)	Likely to be using a range of devices but typically have distinctive uses for them. They are likely to use catch-up and on demand as a supplement to their main television viewing.	The view that TV is the most important source for relaxing and entertainment is still maintained by a small majority. They are more likely to be keen consumers of news content and comfortable looking beyond PSB providers to supplement their current affairs content.	Not familiar with PSB, but like natives, felt the purposes and characteristics were about right. Likely to distinguish between the 'main five' and other channels. Mixed views on the need for regulation. A preference for UK content over content from around the world, but opinion is more split on this than in 2007.	More likely than younger / older people to watch PSB-type content on non PSB or portfolio channels. BBC Four was a highlight for some. Channel 4 seen as having a tendency towards low quality content, though Film4 valued for contribution to UK filmmaking.	The middle-aged group responded much like the youngest group, with tech savvy participants able to imagine how PSB provision on-demand would work. However, this group was also very animated on behalf of wider society, whom they thought would lose out.

Traditionalists: (typically aged 55+)	Most are still highly reliant on the TV listings and predominantly use a television set to access content.	TV remains important personally, though they increasingly appreciate the role of the internet for society as a whole.	More familiar with the history of regulation in this area and most likely to think in terms of the main five or four. Some in favour of PSB, others more relaxed about what might happen without regulation. Animated about regional and UK cultural representation. Want UK content and 'old favourites'.	BBC brand is strong for this group. ITV's reputation is improving among some. iPlayer is the best known and most widely used catch-up or on demand service, but most rely on scheduled television.	Some familiar with time-shifted viewing, but few used to accessing content whenever they want it. Some concerned about impact on society of more on-demand content. Worried people will watch too much content in this scenario.

2 Introduction

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2.1 Background

Ofcom has a duty to assess the public service broadcasters, in terms of how well they deliver against the purposes set out in the Communications Act[1]. The Act requires Ofcom to report on the extent to which the public service broadcasters (PSBs) have fulfilled the purposes of public service television broadcasting, with a view to maintaining and strengthening the quality of public service television broadcasting in the UK. The focus of this research is on 'content' which was defined for the public as content, television programmes, film and other things you watch, read and listen to on websites, mobile phone apps, YouTube etc.

Ofcom has carried out two previous PSB reviews; with final statements published in 2004 and 2009 respectively. Both reviews included consumer research[2] although the definition of content was more limited. This research is for the third review.

The media landscape continues to change rapidly. Since the last Public Service Broadcasting (PSB) review there have been significant changes:

- Following digital switchover (completed in 2012) all households with a television have digital TV enabling access to a broad variety of channels.
- People can now watch television content at a time that suits them via the catch up services and VOD services if they have access to the appropriate devices. Other types of audio-visual content can also be accessed from a range of other sources online.
- The growth of ownership of connected devices, in particular smartphones and tablets, along with improved broadband speeds have also allowed people to watch content outside of the main living room.

These changes are having a significant impact on the volume and range of content available on television and online, the way people access this content and how they choose what to watch, which in turn has significant implications for PSB. However, traditional broadcast TV remains robust and scheduled television remains the main way that most people watch programmes[3].

Ofcom commissioned Ipsos MORI to conduct a programme of qualitative and quantitative research with people across the UK to understand peoples' current views on PSB and what they might want in the future.

[1] The Digital Economy Act (DEA) 2010 extended Ofcom's remit when conducting a PSB Review to include an assessment of the extent to which material included in media services (across television, radio, on-demand programme services and other internet services where there is a person who exercises editorial control) have, during the PSB Review period (taken together over the period as a whole), contributed towards the fulfilment of the public service objectives.
[2] http://stakeholders.ofcom.org.uk/binaries/consultations/psb2_1/annexes/annex5.pdf
[3] http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr14/

2.2 Research objectives

There were two overarching research objectives:

- To explore what UK citizen-consumers' want from Public Service Broadcasting now and in the future.
- To identify any differences in views among different age groups, lifestages, and other demographic groups

Underlying these objectives there were four research questions:

- What type of public service content do people want and is it currently being delivered?
- What do they want from the specific public service broadcasters/institutions?
- What is the impact of other channels and content providers on peoples' perceptions and expectations of the public service broadcasters and the content they provide?
- Looking to the future, what types of public service content do people think are most important, and where/how do they want it delivered (in terms of media services and device)

2.3 Methodological approach

A mixed method approach was considered optimal for this study in order to fully address the objectives, using both qualitative and quantitative techniques.

The qualitative research utilised a deliberative approach to enable a full and detailed exploration of what people thought and why they thought it. Specifically it gave the time and space to discuss the nature and role of PSB in detail, and implications for the future of PSB.

In parallel, a quantitative survey was used to understand the national picture on key issues, as well as providing insight into key subgroup differences. This survey was designed to include questions asked in 2007 to allow trends to be analysed where appropriate.

2.3.1 Qualitative approach

It was vital that this study adopted deliberative techniques, which are designed to inform research participants about key issues so they can arrive at considered conclusions about the matter in question. Our past work for Ofcom has shown that there is limited awareness and understanding of the term 'PSB'.

Using deliberative techniques allows researchers to go beyond immediate reactions or responses based on, for example, knee-jerk reactions or media portrayal of an issue in order to have a balanced debate about the issues. This is carried out by introducing information to participants (through presentations and stimulus material), which helps them to develop their thinking more broadly or encourages them to consider new ideas. Furthermore, the extended time period of a workshop (in this case, over six hours) allows researchers to spend more time with participants, debating and deliberating the topics and working with them to ensure they understand, in depth, the issues at stake.

Deliberative research also allows us to track how views change (and what influences this change) as part of the research process. In our analysis stage we were able to compare responses given to specific questions at the recruitment stage with those given to the same questions at the beginning and immediate end of the workshops. Overall, this approach will help Ofcom to understand better how the provision of PSB may need to change in response to future developments and the extent to which this type of content is important to the public.

The qualitative research included day-long deliberative events with people aged over 18, and extended focus groups with young people aged 16-18. The deliberative workshops were designed to give people the time and space to consider the issues in detail, while the focus groups were shorter and more focussed to ensure younger people stayed engaged.

The qualitative research included a pilot workshop, 6 full day workshops and 2 discussion groups in July 2014. Around twenty-four participants attended at each of the 6 workshop locations, 8 people participated in each focus group. Below is a summary of the dates, locations and age ranges for the groups and workshops.

	Type	Location	Age	Date
Event 1	Focus group (pilot)	London	mix of ages (18+)	1 July
2	Workshop	Glasgow	younger group (18-34), a middle group (35-54) and an older group (55+)	12 July
3	Focus group	Manchester	16 and 17 year olds	15 July
4	Workshop	Newcastle	35-54 years	19 July
5	Workshop	London	18-34 years	19 July
6	Focus group	Brighton	16 and 17 year olds	22 July
7	Workshop	Bristol	55+ years	23 July
8	Workshop	Swansea	younger group (18-34), a middle group (35-54) and an older group (55+)	26 July
9	Workshop	Belfast	younger group (18-34), a middle group (35-54) and an older group (55+)	26 July

All events included a mix of gender, socio-economic group, work status and broadly reflected the ethnic mix of the local area and the demographic groups being recruited. All workshops had a minimum of 10 parents or grandparents.

The recruitment process also ensured a range of people with different viewing habits were represented. This included amount of television watched, a mixture of people who viewed scheduled and non-linear content, as well as a mixture of people who watch across different devices and platforms/subscription services.

In the workshops participants were allocated to tables by age, as this was believed to be the most significant factor likely to impact on attitudes and behaviours. This also facilitated analysis by age to ensure the objectives could be fully addressed.

2.3.2 Quantitative approach

The quantitative research was a thirty minute face to face survey using CAPI (Computer Assisted Personal Interviewing). In total 2,026 interviews were completed between 24thth July and 31st August 2014. The sampling approach was random location sampling, stratified by region, urban vs rural and deprivation. Quotas were set on gender, age, work status and ethnicity.

In order to ensure enough interviews were completed in each of the four nations, to allow robust statistical analysis, the sample was disproportionately stratified to boost the number of interviews in the devolved nations (a minimum of 150 interviews were conducted in each of Scotland, Wales and Northern Ireland).

The survey data have been weighted according to region, work status, and age to reflect the population profile nationally within each nation – England, Scotland, Wales and Northern Ireland. Because the survey was stratified to boost the number of interviews in the devolved nations the effective base size of the sample reduced to 1,919.

2.4 Analysis and reporting

An integrated analysis approach has been taken, combining the findings from the qualitative and quantitative research. To help the reader differentiate between the two, past tense has been used to reflect the qualitative findings whereas present tense has been used to reflect the quantitative findings. Similarly, in the qualitative reporting the report talks about participants, whereas for the quantitative it uses ‘people’ because findings are weighted to be representative of the UK population.

2.4.1 Qualitative findings

Qualitative research approaches are used to shed light on *why* people hold particular views, rather than how many people hold those views. The results are intended to be *illustrative* rather than statistically reliable and, as such, do not permit statements to be made about the extent to which something is happening. Therefore, where possible the quantitative research findings have been interwoven with the qualitative to give an indication of the weight of views held across the population as a whole.

Where reporting on the qualitative findings we have therefore used phrases such as "a few" or "a limited number" to reflect views which were mentioned infrequently and “many” or “most” when views are more common. Where views apply only to a subset of consumers, e.g. young consumers or those who are tech-savvy, we have highlighted this in the relevant text. Any proportions indicated in the qualitative reporting should always be considered indicative, rather than exact.

Verbatim comments have been included throughout this report to illustrate and highlight key points. Some are included because they are illustrative of the views shared by a large number of participants, and others are included because they reflect a minority view of a small number of individuals who felt very strongly about a particular issue. Where verbatim quotes are used, they have been anonymised and attributed with relevant characteristics of users and location.

2.4.2 Quantitative findings

It should be noted that when looking at results from the quantitative study that a sample, and not the entire UK population, has been interviewed. In consequence, all results are subject to sampling tolerances, which means that not all differences are statistically significant. When differences are noted in the text of this report they will always be statistically significant unless stated otherwise.

Where appropriate, the symbol ‘v’ has been used in tables presented in this report to denote where a percentage figure is higher than the UK average (of all adults aged 16+); the symbol ’^’ denotes where a figures is lower than the average.

It is worth noting that a 95% confidence ratio is applied to the quantitative data. This means that the confidence with which we can make this prediction is usually chosen to be 95% - that is, the chances are 95 in 100 that the "true" value will fall within a specified range. The variation between the sample results and the “true” values (i.e. if everyone had been interviewed) can be estimated with knowledge of the number of people responding to a question (the base size) and the number of times that a particular answer is given.
For example, on a question where 50 per cent of all adults respond with a particular answer, in 95 of 100 samples we would expect the true population mean to fall within 2.2 percentage points of this figure.[4]

[4] Strictly speaking the tolerances shown here apply only to random samples. This project used a quota sampling approach and thus was not selected purely at random, which in theory could impact on the tolerances shown here. However, the tolerances shown here can still be used as a guide.

Table 2.1 – Approximate confidence intervals

Size of effective base on which survey results are based	**Percentage of survey responses**		
	10% or 90%	30% or 70%	50%
1,919 (All adults)	1.3	2.1	2.2
1,449 (England)	1.5	2.4	2.6
169 (Scotland)	4.5	6.9	7.6
164 (Wales)	4.6	7.0	7.7
149 (Northern Ireland)	4.8	7.4	8.1

When results are compared between sub groups (e.g. males versus females), differences may appear. The difference may be "real", or it may occur by chance (because not everyone was interviewed). To test if the difference is a real one - i.e. if it is "statistically significant" - we have to know the size of the samples and the percentage giving a certain answer. The same test can be applied when comparing 2014 results with those from the 2007 survey.

For example, if 50 per cent of males (base size: 1,016) give a particular answer and 53 per cent of females (base size: 1,010) give the same answer, there is **no** statistically significant difference between the responses of the two groups as 3 per cent is below the +/- 4.4 percentage point threshold shown in the table below. If however, 47 per cent of males give the same answer, then this **is** a statistically significant difference (since there is more than a 4.4 percentage point difference between the two).

Table 2.2 – Differences required for significance between subgroups

Size of effective base on which survey results are based	**Percentage of survey response**		
	10% or 90%	30% or 70%	50%
1,919 (2014) vs 1,310 (2007)	2.1	3.2	3.5
955 (male) vs 949 (female)	2.7	4.1	4.5
255 (aged 16-24) vs 294 (25-34)	5.0	7.7	8.4
1,064 (ABC1) vs 822 (C2DE)	2.7	4.2	4.6
571 (Children in household) vs 925 (no children visit regularly)	3.1	4.8	5.2
169 (Scotland) vs 164 (Wales)	6.5	9.9	10.8

Where percentages do not sum to 100, this is due to computer rounding, the exclusion of "don't know" categories, or multiple answers. Throughout the volume, an asterisk (*) denotes any value less than half a percent but greater than zero.

Another consideration in the interpretation of all research data is the role of *perceptions*. Different outlooks on an issue make up a considerable proportion of the evidence presented in this study; while these perceptions may not always be factually accurate, they represent the truth for those who hold these views.

2.5 Glossary

Changes in the delivery of television content have prompted use of a new set of terminology when discussing consumption behaviour and attitudes towards Public Service Broadcasting. The most significant of these is in classifying what constitutes as television 'content'. Traditional programmes made for viewing through a TV can now be accessed online through a laptop, computer, tablet or smartphone; at the same time, there are new types of audio-visual content that are designed specifically for these new online devices. For the purpose of this research, the term 'content' is used in its broadest sense, covering all types of traditional TV programmes, films and other audio-visual content that can be access through a TV set top box and/or online on another device. This includes content produced for mobile phone apps and YouTube clips.

	Description
BBC	British Broadcasting Corporation
Content	A broad term used in the sessions to encompass television programmes, film and other things people watch, read and listen to on websites, mobile phone apps, YouTube etc
Main five PSB channels	BBC One, BBC Two, ITV, Channel 4, Five
Main broadcaster portfolio channels	Digital channels provided by the main broadcasters, e.g. ITV2, ITV3, ITV4, BBC Three, BBC Four, BBC News 24, More 4, E4, Film4, 5*, Five USA, etc
PSB	Public Service Broadcasting
PSC	Public Service Content
VOD	Video on Demand

3 Context: accessing television content

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This chapter explores how people are watching television and consuming content more widely. It provides an overview of the amount and type of content people access, and which channels or services they use. It also explores the types of behaviours discussed by participants in the deliberative workshops including how people discover and engage with content.[5] This chapter uses what participants in this research said they consume as context to the attitudes and preferences regarding Public Service Broadcasting (PSB) outlined later in this report. Other sources of evidence, such as Ofcom's 2014 Communications Market Review[6], provide a more comprehensive assessment of consumer behaviour

Key findings

- People are using new ways to access television content; 60% claim to be using online or on demand services. The boundaries between offline and online experiences are less apparent as people have begun to access online content from a device that they are used to thinking of as offline (their television).
- People are using a wide variety of sources for content. In addition to the main five channels, 82% claim to use PSB portfolio channels at least once a week, just over half use other commercial channels (54%). Among those who use online or on demand services, Netflix is the most widely used commercial content aggregator.
- Technology has changed the way people engage with content, including using audio-visual content as a 'boost' to keep up to date with news or short-format content, or to distract themselves for a short space of time.
- People are using new ways to discover content they want such as on demand service menus, being guided by recommendations from service providers, as well as searching for content friends or family have already viewed and recommend. As a result content is becoming increasingly self-selected to suit individual tastes.
- Age and access to technology are important factors that shape how individuals consume content and make choices about what content to watch. The broad typologies have emerged from the analysis: tech natives, tech learners and traditionalists. These are discussed further in section 3.5.

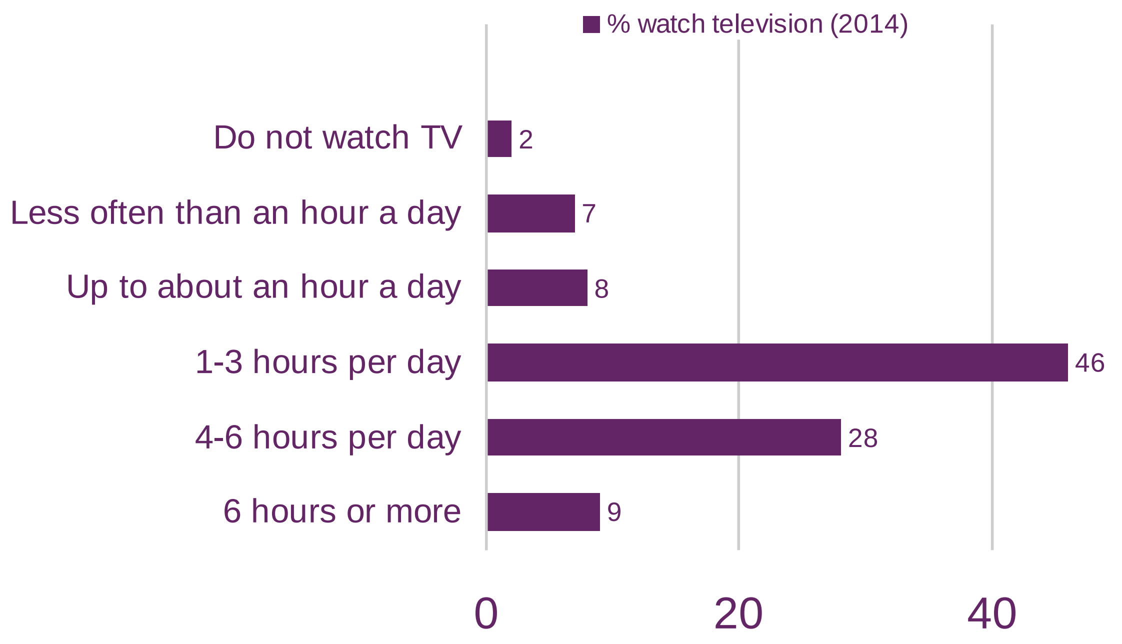
[5] For the purpose of this research, the term 'content' is a broad term used in the sessions to encompass television programmes, film and other things people watch, read and listen to on websites, mobile phone apps, YouTube etc
[6] http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr14/

3.1 Media use and access to TV

3.1.1 Consumption of scheduled television and on demand content

Findings from both the deliberative workshops and quantitative research show that TV remains an integral part of everyday life. The quantitative research reveals that nine in ten people (90%) watch television content every day. This encompasses all the different ways in which people watch TV programmes or films, either on scheduled TV, recorded TV, catch-up TV or other on demand services. The amount of television content consumed increases with age, with those aged 55+ twice as likely to watch four hours a day compared with those aged 18-34 (52% compared with 26%). [7]

Figure 3.1 – Hours spent watching television across all platforms



Source: Question T015. Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+, July – Aug 2014
Q: I'd like you to think about all the different ways in which you watch TV programmes or films, either on scheduled TV, recorded TV, catch-up TV or other on demand services. On an average day how many hours would you say you watch television

By keeping a diary of their viewing behaviours as a pre task to the workshops, people became more aware of their everyday habits and many were surprised by how much of a role television played in their lives. This often led them to realise that they had the television on in the background, even when it was not their main focus.

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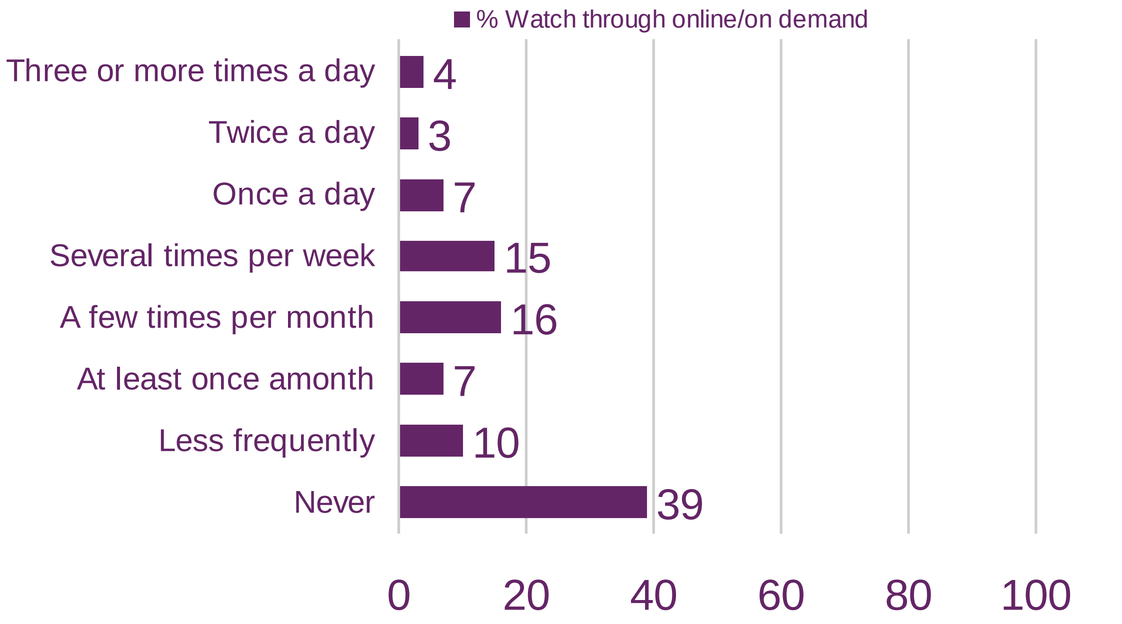
[7] Further detail on media consumption habits is provided in The Communications Market Report, Ofcom, August 2014 (http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr14/2014_UK_CMR.pdf). The report provides a comprehensive assessment of the market and consumer behaviour for television, radio, and the internet. Figures from BARB presented in the report suggest that there has been a slight decline in the average amount of TV viewing since 2013.

"I realised when doing my diary that I watch a lot of ITV. I put on Good Morning Britain first thing when I'm getting ready. Then when I come back [from work/college] I watch The Chase when cooking dinner then Coronation Street."
London, 28-35.

Many participants in the deliberative workshops also discussed using on-demand and catch-up services. People were often watching catch-up or on demand content through a smart TV, a television with a set-top box or a by connecting laptops, mobiles or tablets to television sets.

Overall, the quantitative findings show that three-fifths of people (60%) use the internet or 'on demand services' to watch television programmes or films; more than one in ten people (13%) watch content in this way at least once a day.

Figure 3.2 – Frequency of watching television programmes and films through an online or "on-demand" service



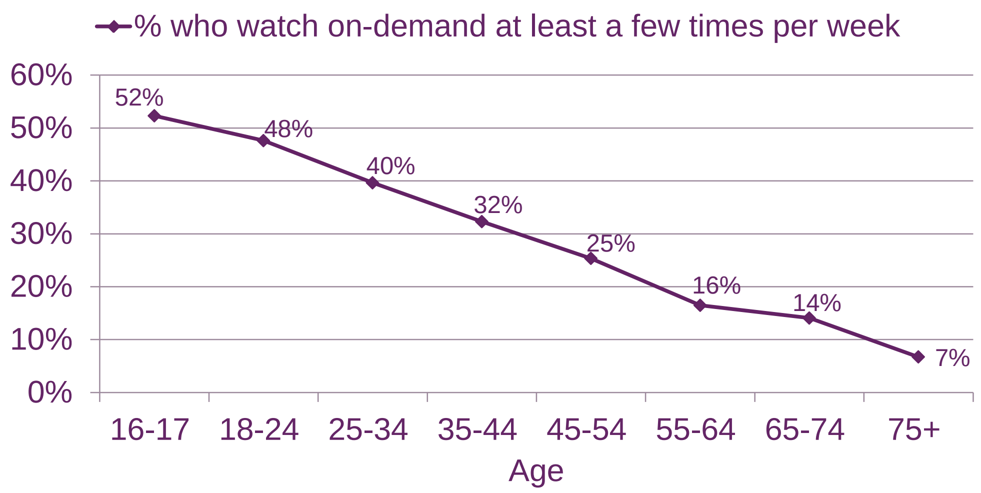
Source: Question T012. Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+. July – Aug 2014
Q: How often, if at all, do you watch television programmes or films online or through an 'on demand' service?

As demonstrated in Figure 3.3, use of online and on demand services is highly correlated with age. This type of viewing is particularly prevalent among young adults aged 16-24. Further data analysis shows that a quarter (25%) of 16-24 year olds use these services every day.

Use of these services also varies by region, with those in London the most likely to use them at least once a day (21% compared with 13% overall) and those from the South East (36%) and South West (41%) most likely to be 'moderate' users (i.e. using the service several times a week / a few times a month compared with 30% overall).

People from lower socio-economic groups are less likely to use online or on demand services. Half (51%) of those from C2DE socio-economic groups say they *never* use these services, compared with just 30% of those from ABC1 socio-economic groups. This is partly correlated with access to the technology needed to watch content online or on demand; however, even those from C2DE socio-economic groups with access to the technology are less likely to use these services.[8]

Figure 3.3 – Percentages of viewers, by age, who use on-demand services frequently



Source: Question TO12.
Base: All respondents (2,026) Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: How often, if at all, do you watch television programmes of films online through an 'on-demand' service?

3.1.2 Accessing online and on demand content

Discussion in the deliberative workshops revealed an increasing variety in people's experiences of consuming content. The boundaries between offline and online experiences was less apparent as people had begun to access online content from a device that they are used to thinking of as offline (their television). It was therefore more difficult to identify when they were watching content 'online' rather than through a cable, satellite or aerial service. However, those with Smart TVs commented that the experience of viewing online material through their Smart TV was not yet completely seamless; some said that even though they had a Smart TV they preferred to use online or on demand services through a laptop because it reduced the amount of buffering.

Furthermore, younger participants and the more tech savvy discussed their behaviour in the terms of television content forming part of their overall consumption of media content, rather than online content forming a specific part of their television consumption. These participants described how they watched programmes and films online (not necessarily using the commercial on demand or catch up services) or downloaded / streamed short clips from YouTube and social media sites. This behaviour took place within the wider context of their online lives where they were communicating with friends, reading up on things that interested them, listening to music etc.

[8] Those from C2DE socio-economic groups are less likely than ABC1s to have access to a computer or laptop (59% compared with 82%), tablet (39% compared with 56%), smartphone (55% compared with 68%) or a Smart TV (27% compared with 33%). However, as an example, 39% of those of those from C2DE socio-economic groups with access to a computer/laptop have never used online or on demand services compared with 25% of ABC1s with access to the same technology.

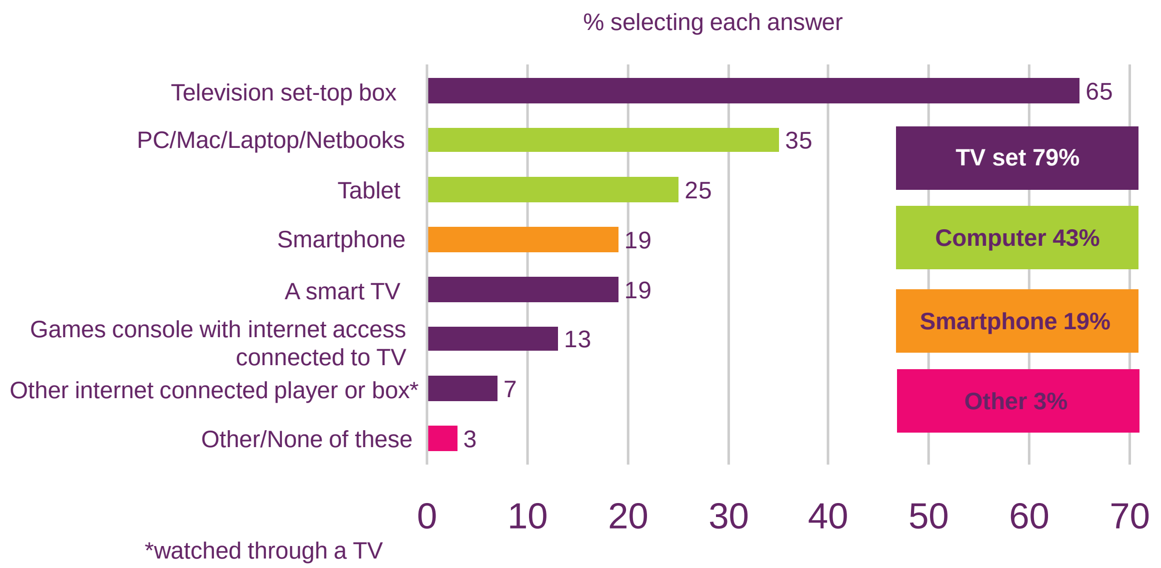
"You'll get a certain show, and there'll be a group on Tumblr and it's never ending, there will be gifs and photos. You can connect to people on shows you are interested in."
Manchester, 16-17

"[I watch] Netflix and American TV shows. Sometimes catch up. I don't go downstairs (to watch TV) often, just whatever I can get on my laptop."
Manchester, 16-17

"Two years ago, no one used to watch YouTube, [or use] Tumblr and fanzones but now it's more popular, now there are companies sponsoring YouTube users! …There's more on YouTube that appeals to me."
Manchester, 16-17

The quantitative research highlights that although television sets remain the most common way of accessing online and on demand content (79% of those watching on demand use this method - including through set-top boxes, smart-TVs or Games Consoles), more than two-fifths (43%) of people use a computer or tablet to watch programmes. Furthermore, a fifth (19%) of people watching television programmes online or on demand use their smartphones.

Figure 3.4 – Ways in which viewers watch television programmes online or on demand



Source: Question T013. Base: All who watch on demand (1,201) UK adults aged 16+, July – Aug 2014

Q: In which of these ways do you personally watch television programmes online or on demand at home or anywhere else?

Use of device differs by age, with younger people being most likely to access television content through means other than a television set. For example, those aged 16-24 are the most likely to access TV content through a computer or tablet (66% compared with 43% overall) or a smartphone (38% compared with 19% overall). However, the television set still remains the most commonly used device for this age group (72%). Those aged 35-54 are the most likely to use a television set (84% compared with 79% overall).

Those from higher socio-economic groups are also more likely to access content through computers or tablets (47% ABC1 compared with 36% C2DE); however people of different socio-economic groups are equally likely to use TV sets (80% ABC1 compared with 78% C2DE) or smartphones to access this type of content (18% compared with 20%).

Table 3.1 – Platform used for watching online and on demand services by age and socio-economic group

		Base (all who are watching online and on demand services)	% watching online and on demand service through…		
			TV	Computer / tablet	Smartphone
Age	16-24	*213*	72 v	66 ^	38 ^
	25-34	*226*	*82*	54	30
	35-54	*461*	84 ^	38 v	16 v
	55+	*301*	75 v	33 v	4 v
Socio-economic group	ABC1	*776*	80	47 ^	18
	C2DE	*416*	78	36 v	20

Source: Question TO13.
Base: All those who watch TV programmes online or on demand (1,201), Interviews with 2,026 UK adults ages 16+, July – August 2014
The symbol 'v' denotes where a figure is higher than the UK average of all adults aged 16+; the symbol '^' denotes where a figures is lower than the average.
Q. In which of these ways do you personally watch television programmes online or on demand at home or anywhere else?

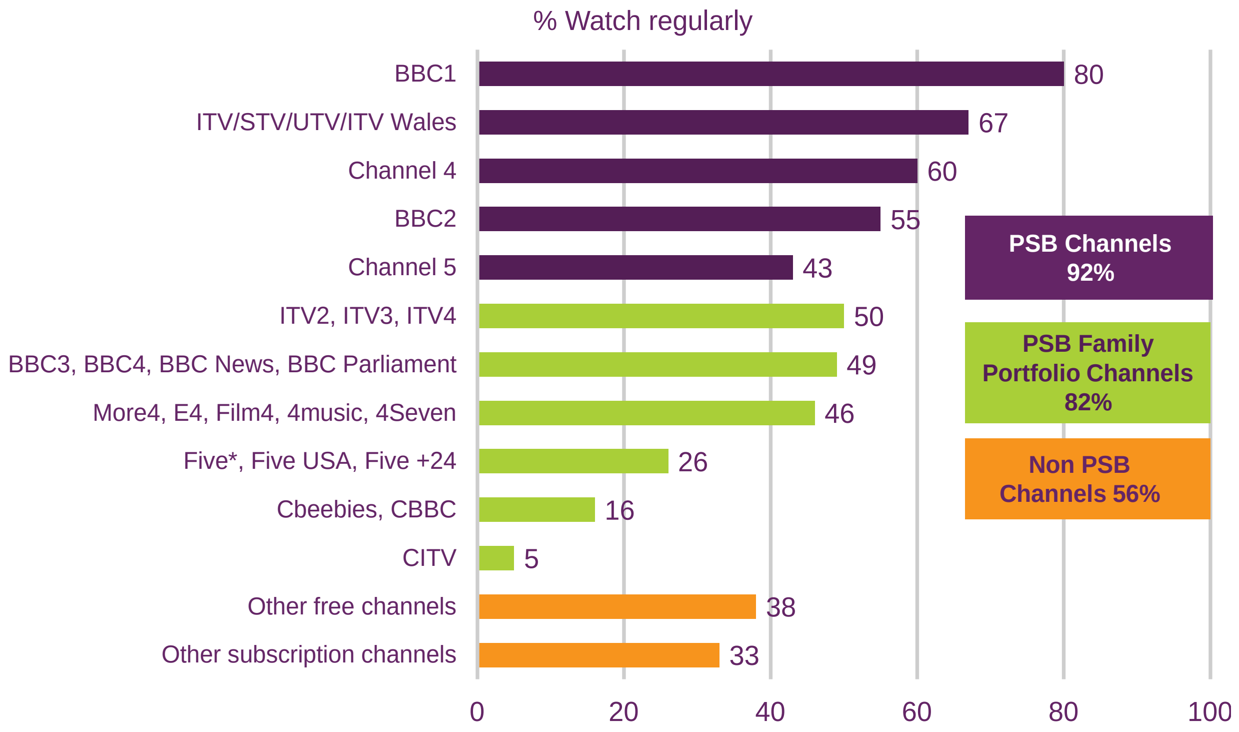
3.2 Channels and services accessed

3.2.1 Channels

Despite a proliferation of digital television channels and on demand services in recent years, in line with BARB viewing figures, the quantitative research shows that the five main channels (BBC One, BBC Two, ITV, Channel 4 and Channel 5) continue to be the most used by viewers. More than nine in ten (92%) people say they watch at least one of the five main channels a few times a week or more; eight in ten regularly watch a PSB portfolio channel (82%), and just over half regularly watch other digital channels (56%).

Though BBC One is clearly the most commonly viewed channel overall (80% watch frequently), viewing of the portfolio channels provided by ITV (50% watch these portfolio channels frequently) and Channel 4 (46% watch frequently), are just as common as use of BBC portfolio channels (49% watch frequently).

Figure 3.5 –Television channels that are viewed regularly



Source: Question T04. TO5 Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: Which of these television channels, if any, would you say you watch regularly at home or anywhere else? (e.g. a few times a week or more)

Regular use of each of BBC One, BBC Two, ITV and Channel 5 increases with age. However, regular use of Channel 4 remains broadly consistent across all age groups. People from ABC1 socio-economic groups are more likely to watch BBC One and Two (84% compared with 79% of C2DE) and Channel 4 (65% compared with 54%) regularly; those from C2DE socio-economic groups are more likely to watch ITV (70% compared with 65% of ABC1) and Channel 5 (46% compared with 41%).

Use of the PSB portfolio channels is highest among younger age groups (91% of those aged 16-24); middle aged groups are most likely to watch television channels broadcast by non-PSB providers (63% of those aged 35-54 compared with 56% overall).

Table 3.2 –TV channels watched regularly, split by age of viewers

	Base	% Watch any of five main channels	% watch an PSB portfolio channel	% watch any other channels
16-24	267	92	91 ^	59
25-34	309	87 v	84	50 v
35-54	683	90	80	63 ^
55+	766	96 ^	80 v	51 v

Source: Question TO4 and TO5.
Base: All respondents (2,026). UK adults aged 16+, July – August 2014
The symbol 'v' denotes where a figure is higher than the UK average of all adults aged 16+; the symbol '^' denotes where a figures is lower than the average.
Q: Which of these TV channels, if any, would you say you watch regularly at home or anywhere else? That is, a few times a week or more often

3.2.2 Online and On Demand Services

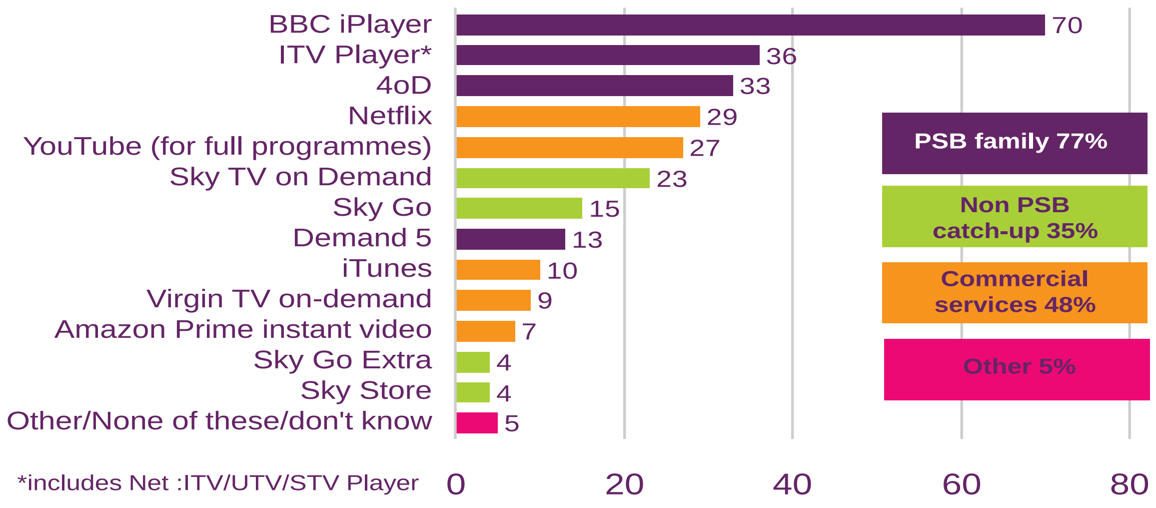
As noted previously, three in five people (60%) use an online or on demand service. Participants in the deliberative workshops referred to using multiple providers, including commercial services, to meet their needs.

> *"I value things like Netflix, Amazon and LoveFilm. When you [used to have] to go to Blockbusters [you were] really careful with what you picked. Now we've got a wide choice [we can access from home] we watch quite a lot of foreign things and have watched some brill things."*
> Newcastle, 35-44

Usage of a range of different providers is also evident in the quantitative research. Those who watch content online or on demand at least once a month are most likely to turn to an on demand service provided by BBC, ITV, Channel 4 (77% of on demand users use PSB on demand services at least once a month). However, just over a third (35%) use a non-PSB catch up service[9] regularly, and close to half (48%) use commercial services [10]such as Netflix, YouTube, and Sky TV on Demand at least once a month.

9 Non PSB catch up service includes Dave on Demand; Sky TV on Demand; Sky Go; Sky Go Extra, Sky Store, Now TV,
10 Commercial services: Virgin TV on-demand, Virgin TV anywhere, BT player, Talk Talk Player, Google play, iTunes, Netflix, Amazon Prime instant video, Blink Box, X box video, YouTube

Figure3.6 –Services which are used to watch television programmes or films online or on-demand



Source: Question T014. Base: All who use on demand services at least once a month (990). Interviews with 2,026 UK adults aged 16+, July – Aug 2014 Note: Services with less than 4% have been omitted Q: Which, if any, of the following services do you use to watch television programmes or films online or on-demand?

As shown in the table below, on demand services provided by one of the five main channels are the most commonly used services for all age groups. However, younger people are more likely to use 4oD (56% of those aged 16-24 use 4oD compared with 33% overall). Online and on demand users aged 16-24 are also more likely to use commercial services (61% compared with 48% overall). The most common of these are Netflix (53% of young adults aged 16-24 compared with 29% overall) and YouTube[11] (47% compared with 27% overall).

Services provided by PSB channels are more likely to be used regularly by people from ABC1 socio-economic groups (82% compared with 69% of those from C2DE).

[11] Question wording specified YouTube (full programmes of films, not short clips)

Table3.3 – Services which are used to watch television programmes or films online or on-demand, split by age of viewers

		Base	% use PSB player	% use non-PSB catch up service	% use PSB commercial services
Age	16-24	190	83 ^	37	61 ^
	25-34	200	77	38	54 ^
	35-54	379	77	38	45
	55+	221	71 v	24 v	30 v
Socio economic group	ABC1	*776*	82 ^	35	50
	C2DE	*416*	69 v	35	44

Source: Question TO14
Base: All who use on demand services at least once a month (990) UK adults aged 16+, July – August 2014.
The symbol 'v' denotes where a figure is higher than the UK average of all adults aged 16+; the symbol '^' denotes where a figures is lower than the average.
Q: Which, if any, of the following services do you use to watch television programmes or films online or on demand?

3.2.3 Usage of websites and apps

In recent years, PSB providers (and other broadcasters) have increasingly produced new types of television content, including libraries of short clips hosted on websites, and smartphone apps made for a specific programme.

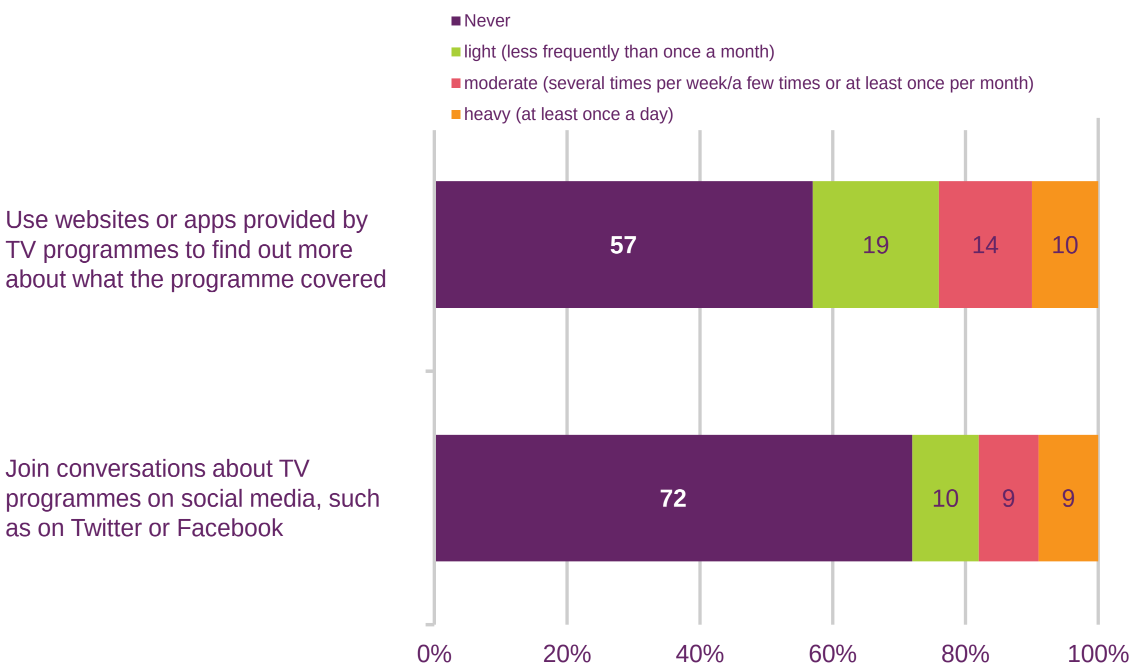
Awareness of this new type of content among participants at the deliberative events was mixed. Though most participants could give an example of one or two relevant websites or smartphone apps, this was not a common form of engaging with content. Some who had tried downloading apps had used them a couple of times and lost interest, while others said they did not have the space on their phone to download lots of apps. They were seen as being gimmicky by some.

The survey shows the majority of internet users (57%) have never used a website or app provided by a TV programme to find out more about what the programme covered. One-fifth (19%) only do this occasionally (less than once a month). Around one quarter (24%) of internet users claim to use these services at least several times a week.

Use of websites and apps is higher among younger age groups; over half (53%) of internet users aged 16-24 have accessed these services compared with 29% of those aged 65+. It is also more common among people from higher socio-economic groups (47% of ABC1 have used compared with 37% of C2DE). However this is likely to be related to access: 92% of those from ABC1 socio-economic groups access the internet compared with 75% of those from C2DE groups; similarly 68% use a smartphone compared with 55% of those from C2DE groups.

Joining conversations about programmes on social media is less common; over seven-in-ten (72%) internet users (72%) never do this. Less than three in ten (28%) people say they ever do this. Again, younger age groups are more likely to have used social media in this way.

Figure 3.7 – Frequency of using websites or apps provided by TV programmes, and of joining conversations about TV on social media



Source: Question T011.
Base: All who personally use the internet (1,677). Interviews with 2,026 UK adults aged 16+, July – Aug 2014
Q: How often, if at all, do you do: a) use websites or apps provided by TV programmes; b) join conversations about TV on social media?

3.3 Common user behaviours

In the deliberative workshops, many participants described how they engage with content in a variety of different ways during a given day or week. Three broad behaviours were identified in the qualitative analysis: using content as ***background,*** as ***foreground,*** or as a ***boost.*** These are summarised in Figure 3.8 below. Most people would adopt all three behaviours, although boost content was most common among the youngest participants and those who were more tech savvy.

Figure 3.8 – A summary of how people use content (background, foreground, boost)

Background content	Foreground content	Boost content
Purpose: provides company/comfort, it's habitual / part of routine	**Purpose:** relaxation, education, entertainment, fulfilment, indulgence, bingeing	**Purpose:** replaces reading newspapers/listening to the radio, fills time, stay connected or share viewing experience with friends (e.g. via Facebook or Whatsapp)
Context: at home, bedroom, kitchen, static device	**Context:** set aside time, prefer using main TV if available, otherwise laptop/computer/tablet if own	**Context:** on-the-go, mobile devices, laptop/PC at work
Genres: news, sport, drama, documentaries, children's TV, 'daytime telly'	**Genres:** predominantly entertainment: drama, soaps; also factual: documentaries, history & nature programmes	**Genres:** mainly news and sport but, for some, also shorts of factual clips/interviews and short clips of drama follow-ups or comedy sketches
Services: scheduled content, PSB TV channels, key competitors, trusted channels, or trusted genres e.g. news channels	**Services:** scheduled TV for less web-savvy. For tech-literate: PSB on demand players (e.g. iPlayer) and non-PSB (e.g. Netflix and Sky portfolio)	**Services:** website content, apps, Twitter, YouTube, Tumblr, downloads
Users: Many different types of consumer, ranging from full-time workers / parents (esp. mums) / retired people / living alone. Users have particular channels they tune into at a certain time; often when multi-tasking.	**Users:** a key use for all. The difference is in how services are accessed	**Users:** often young, smart device owners, comfortable with and enjoy using tech as replacement for other media forms, 'content consumers' rather than purely 'TV watchers'

Source: Ofcom 2014 PSB Review

3.3.1 Content as background

Many participants described instances when they had their television on in the background while going about other activities. This type of behaviour often formed part of a routine, accompanying daily and usually domestic activities such as getting dressed in the mornings, cooking an evening meal or ironing. Participants commented that their engagement with this type of content was relatively passive as their primary focus was on something else. This applies to regular television content that participants have on in the background as well as music channels or radio stations that participants tuned into through their televisions. Older participants were more likely to default to PSB channels for background content, while other participants would sometimes choose genre-specific channels or online channels such as SB.TV.[12]

3.3.2 Content as foreground

When participants talked about watching the television they were most likely to describe occasions when they use television as foreground content; giving it their sole attention. They often set aside time to do this and watch a specific programme or film of their choice. Many were consuming content in this way at home. This was often linked to a desire to relax, be entertained or immersed in a subject, and thus the content was often programmes rather than short form content.

[12] SB.TV is a 'music and lifestyle' online media platform which broadcasts through YouTube. More information can be found here: http://sbtv.co.uk/about-2/

Advances in technology have changed the way people engage with content as *foreground*. In some cases, participants said they were consuming content alone, while others in their household were simultaneously watching their own content in another room, or sometimes in the same room, using a laptop or tablet.

Some of the more tech savvy participants described instances where they were had pre-downloaded content or were streaming programmes to watch on the go. Some younger participants also described themselves being immersed in more than one activity at a time. For example, although the content remains the primary focus, they might sit down to watch a programme or a film while simultaneously using their phones to message friends, chat or update their status on social media.

3.3.3 Content as a boost

Thirdly, some participants described consuming short form content and engaging with online media sources to keep up to date, or to distract themselves for a short space of time. Participants said they were likely to be on-the-move when doing this and would commonly use a mobile device like a smart phone or tablet. These were therefore often unplanned occasions; for example while waiting for a bus or a friend. Few participants would only consume content in this way. Rather, using content as a boost was a supplement to other ways of engaging with content.

Younger participants saw chatting about a programme in a WhatsApp group or sharing a link on Facebook as just another way to connect socially and engage with content. Some middle aged and older participants were also engaging with content in this way while working on a laptop or a PC. They described how they would dip in and out of the internet during the day, watching short clips of comedy or news, reading a topical article from a news site or browsing the latest sporting updates.

3.4 Ways of discovering television content

Participants in the deliberative workshops described their decision-making processes for choosing what to watch. These are summarised in Figure 3.9 below.

Figure 3.9 – Ways consumers decide what to watch

researching

Hard copy listings:
- Often consulted in advance to 'plan' viewing
- Favoured by older and/or less techy

EPG:
- Often used just before viewing or to plan what to record
- Older & less techy use in tandem with traditional listings

demanding

On-demand service menu:
- Often used moments before viewing, with a genre/ programme in mind
- Includes catching-up from the schedule (if missed) or choosing to watch something to fit mood/follow recommendation

stumbling

Directed stumbling:
- Discover content in-the-moment, e.g. seeing a trailer while watching linear TV

Pure stumbling:
- Leaving the telly on after chosen show has finished and deciding to watch the next programme

Source: Ofcom 2014 PSB Review

Many used multiple approaches, such as consulting a form of listings (whether hard copy or electronic) or taking on board recommendations (from friends/family/other viewers or content providers and services), using different methods depending on their mind set and reason for watching content at the time. Some also described pure stumbling, although typically this was as a result of using television content as ‘background’.

> *“There are times when you are just flicking through… there was a documentary on the BBC…something on the Battle of the Somme and I didn’t look for it [but] I watched the whole thing. I was even angry when partner tried to turn it off!”*
> Newcastle,34- 55

Methods for exploring and deciding what content to watch were shaped largely by existing habits. For example, many older participants (65+ years old) preferred to consult a hard copy of the TV listings like the Radio Times or the TV guide of a newspaper. In doing so, their sourcing behaviour matched their viewing habits which were more likely to involve watching scheduled TV and, in many cases, defaulting to the main PSB channels as their first ports of call. Others were using electronic TV listings (i.e. the Electronic Programme Guide / EPG) as a method of programme selection from the linear schedule.

Younger and more tech savvy participants were much less likely to be using scheduled listings as their main way to decide what to watch, as many were watching content they sourced online or on demand. These participants spoke in terms of finding a programme or a type of programme; they saw themselves as shopping around, looking for the ‘right’ content for their current mood or catching up on something they had missed or that people had recommended to them. Unlike some older viewers who would plan their television viewing using the TV schedule, these participants were typically not constrained by the fixed timings of scheduled television. Search for content was often prompted by recommendations from friends and related to the top trending shows among their peers. However listings or the EPG also remained important to make sure that they did not miss an episode of their favourite series, particularly the first in a new series or the season finale.

> *“If you want to watch something as soon as it comes out [you’ll use scheduled TV]…But if it came on years ago, you’d do it online”*
> Manchester, 16-17

> *“If people on Twitter are talking about a show, I’ll go and watch it.”*
> London, 16-24

> *“Somebody might say that something really good happened on EastEnders or something like that, so I would go on catch-up and watch it.”*
> London, 16-24

Some participants using on demand and online services talked about unexpectedly finding content through service recommendations. Specifically they mentioned making choices about what to watch based on the recommendations of their provider as a result of previous viewing preferences. A few participants reflected that as a consequence of the recommendations made by providers they were in fact narrowing their choices and increasingly watching content that was of a similar type, rather than the range of programmes they would watch when there were fewer channels or options. A handful also talked about missing adverts for upcoming programmes as a result of skipping through the adverts when watching pre-recorded or catch-up TV.

> *"Because I'm skipping adverts a lot these days through catch up service or on demand, I find that I miss adverts for upcoming TV programmes, so if I don't catch them when they happen to be on, I'll often miss them."*
> Glasgow, 18-34

3.5 Importance age and relationship with technology

Age and a person's relationship with technology are important factors that shape how individuals consume content and make choices about what content to watch. Three broad typologies have emerged from the analysis of the deliberative research: tech natives, tech learners and traditionalists. These appear to be largely driven by the media conditions people have been exposed to at formative points in their lives and as a consequence are closely related to age. However, it is unlikely that as the tech natives get older they will revert to being tech learners – rather it seems likely that most will maintain their current learned behaviours, even as new behaviours emerge in the next generation of young adults.

There are inevitably individuals who do not fit within the typical ages for the typologies, for instance older people who are tech natives and younger people with more traditionalist habits. However, overall they provide a way to understand how society is changing and how the role of content on the TV and internet is also evolving for different people.

3.5.1 The tech natives (typically aged 16-30)

Tech natives are likely to have multiple devices and use a diverse range of sources interchangeably. They do not feel they need a schedule and often use on demand and catch up services. Compared with older people they are much less likely to use TV listings, instead they shop around from a range of content providers over a number of platforms or follow recommendations made by friend.

- Watch less TV, but are consuming more on demand content
- The group most likely to use 4oD, Netflix and YouTube.
- More streamlined experience between catch up and scheduled – more likely to watch through smart TVs, set-top box, or laptops/tablets connected to larger devices.
- Consume content as a broader part of their online lives, especially for the youngest participants.

- Most likely to watch boost content, binge on foreground content and consume background content as part of their daily routine, often from non-PSB (or portfolio) channels.

- Less likely to use TV listing; they "shop around for content" based on recommendations from friends.

- The group most likely to consume portfolio channels and use websites and apps.

- Often do more than one activity while watching content, for instance communicate with friends or browse social media. As a result they are also the group most likely to have talked about content on social media.

"I can get through 2 seasons of a series in a day, but I cannot find the time to sit down and watch the TV!"
London, 16-24

3.5.2 The tech learners (typically aged 30-55)

Tech learners are likely to be using a range of devices but use them less seamlessly than the tech natives; typically they have distinctive uses for each device and platform. They are likely to use catch-up and on demand as a supplement to their main television viewing or as boost viewing. This group use the PSB and portfolio channels but they are also more likely to watch content on the non-PSB and non-PSB portfolio channels than either younger or older groups.

- Watch broadcast content predominantly on a TV set, but they may catch-up or boost with other content using other devices.

- They consume background content as part of a routine, often using PSB channels.

- They use boost content while on the go or in snatched moments for example when taking a break from work.

- They source new content using the EPG, word of mouth recommendations or via broadcast adverts.

- They are more likely than either other group to consume content that is not PSB or PSB portfolio

"I have basic Freeview so I watch live unless I want to watch something [in particular, then] I go on the laptop."
34-55, Newcastle

3.5.3 The traditionalists (typically aged 55+)

Most in this group exclusively use a television set to access content. It is common for traditionalists to source content using the TV listings as well as adverts and recommendations from friends. They might use background content as company, often using PSB channels in this way.

- Watch more TV than any other group, and many watch exclusively on a TV set

- Far fewer have used a website or app provided alongside TV programmes.
- Use background content as company, often from PSB channels
- Most likely to find content through adverts, word of mouth and TV listing, some may use an EPG

"Occasionally I'll use phones and apps with the grandchildren… They show me funny stuff on YouTube, it's very bizarre! I can't get to grips with it at all."
Bristol, 55+

3.5.4 Access to technology

In addition to the factors outlined above, participants' access to technology was also relevant to their consumption habits. For example, some participants who lived in households with poor broadband access, or without access to devices such as computers and smartphones, were limited in how they watched content, even where they were receptive to the idea of on demand or catch up television. Furthermore, younger participants in low-income households may not themselves be using paid-for services like Netflix, but were usually familiar with the service and were able to talk about what this means for PSB.

Some with poor internet connections thought it was not possible to get sufficient broadband speeds to stream content, while others perceived broadband to be too expensive. This was particularly common among the traditionalists, but also among tech learners with less financial resources who felt that installing broadband, or using the internet to stream more content, would use a reasonable proportion of their income, and they did not feel that the benefits of spending this money would be worthwhile compared with watching scheduled broadcast content.

Findings from the quantitative research show that 71% of those who have access to fixed broadband access online or on-demand content compared with three in five people overall (61%), and fewer than half (47%) of those who only have access to mobile broadband access on-demand content.

4 Perceptions of the value of television and PSB content

4 Perceptions of the value of television and PSB content

In the context of a rapidly changing marketplace, this chapter provides an overview of public perceptions of the value of television and of the principles that underpin PSB. It first reviews the value of television as a source of entertainment and information, and the value of different types of programme to society. It then explores reactions to the four PSB purposes and the five PSB characteristics, with examples of programmes people associate with the purposes.

Key findings

- People continue to value the role that television plays in society, although the internet has become significantly more important since the last review.
- Television remains an important source of information and entertainment, but less so for personal interests.
- The PSB purposes and characteristics – and the content these produce - are still seen to be important; however people, are less likely to distinguish between the PSB five main channels as a group and other non-PSB providers.
- People increasingly have a stronger association with programmes rather than providers, and are likely to distinguish between good and bad content, not PSB and non-PSB.
- The importance and value of the PSBs varies by genre. The PSBs are seen as particularly important for news, factual content and sport; however people are increasingly turning to PSB portfolio channels and commercial on demand services for soaps and dramas.
- There is broad consensus that PSB characteristics are fit for purpose, though it is increasingly important for content to be high quality, innovative and original.
- Younger audiences are unfamiliar with the concept of PSB and are the most likely to make choices based on programmes rather than provider brands. The value of television and the identity of the PSBs as a distinctive group increases with age. Further generational analysis is explored in section 4.7.

4.1 Value of television in society

4.1.1 Television as a main source of media content[13]

Despite the growth in access to the internet and the ownership of connected 'on-the-go' handheld devices, the quantitative study reveals that television remains the most important source of information and entertainment for a range of different activities and pastimes.[14]

As shown in Figure 4.1, close to two-thirds of adults consider television content to be their most important source of media content for *relaxing and entertainment* (63%). Television is also the most important source for *finding out news about in the UK* (53%), *finding out what is happening around the world* (52%), *knowledge about topics such as arts, science, nature or history* (43%) and *finding out news about what's happening in your local area* (40%).[15]

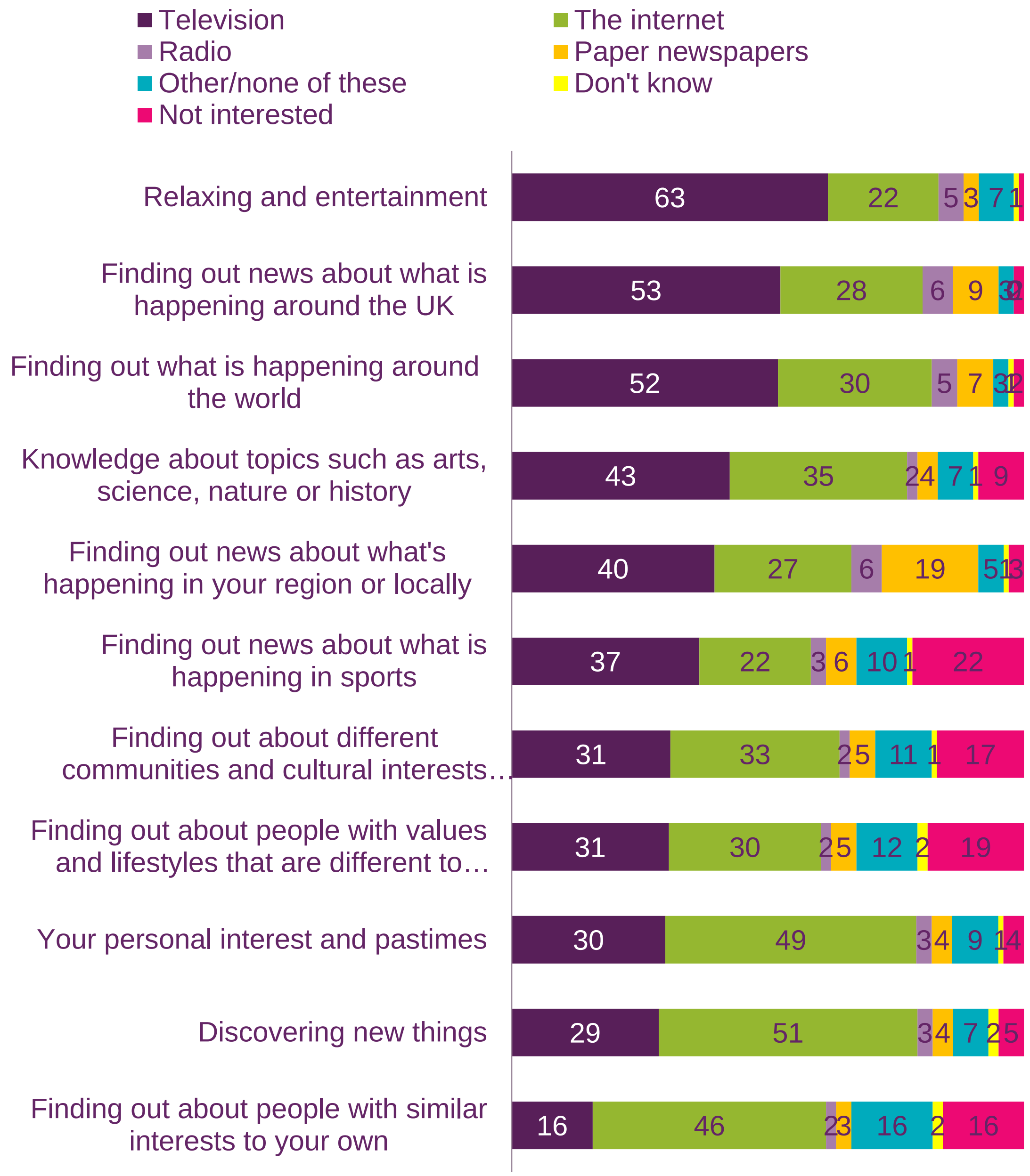
However, the importance of the internet is growing, and in some areas challenging television's dominance. In 2014, the internet is more likely than television to be valued as the most important media source for *your personal interests and past times* (49% compared with 30% for TV), *discovering new things* (51% compared with 29% for TV) and *finding out about people with similar interests to your own* (46% compared with 16% for TV).

The importance of TV and internet varies with age. Consistently across types of activities, those aged 45+ are more likely to report the TV to be their most important source than those aged between 16 and 44, who are more likely to cite the internet. For example, 68% of 45-54 year olds say TV is the most important source for relaxing and entertainment, compared with 47% of 16-24 year olds, 57% of 25-34 year olds and 57% of 35-44 year olds. In contrast, when it comes to finding out what is happening in the world , 18-24 year olds are most likely to say the internet is their most important source over TV (55% internet compared with 32% TV), whereas 16-17 year olds have less of a preference (39% internet compared with 40% TV).

More people in Scotland say the internet is their most important source for regional news than in any other nation, two in five (40%) feel this is the case in Scotland compared with 25% in England and Wales and 21% in Northern Ireland.

[13] For the purpose of this research, 'media content' refers to the full range of different outlets of audio, visual and print media. This includes newspapers, online blogs and television channels.
[14] The range of media sources listed as part of the question included: TV, Radio, Websites provided by PSB broadcasters, social media, newspaper websites, other websites, paper newspapers.
[15] In the context of this question, 'television content' includes: 'scheduled TV or TV you have recorded yourself' and 'on demand / catch up TV services'. Furthermore, the 'internet' includes reference to websites provided by the BBC, ITV, Channel 4 or 5. A review of the value of PSB provider websites, and a comparison of scheduled and on demand television is provided elsewhere in the report.

Figure 4.1 – Most important media sources for different types of content



Source: CPP1b, 2026 interviews with UK adults aged 16+, August 2014

Q: Which of these is your most important source for this content?

4.1.2 Comparisons with 2007

In 2007, respondents to the quantitative research were asked to cite their *most valued* media source; in 2014, people were asked to cite their *most important.* Because the wording has changed a comparisons should be done with caution. However, the changes in reported importance of the internet displayed in Figure 4.2, below are so large that they are unlikely to be a result of the changed question wording alone, especially as there has not been much change in the percentage of people choosing TV as their most important/valued source. Specifically the table reveals that there has been a considerable shift in the perceived importance of the internet as a source of information and entertainment across most of the activities. By contrast, televisions importance has reduced for three of these activities, particularly related to the news.

Figure 4.2 – Importance placed on media sources for various kinds of content: Changes[16] between 2007 and 2014

	% choosing TV as main source[17]			% choosing internet as main source[18]		
	2007	2014	% change since 2007	2007	2014	% change since 2007
Relaxing and entertainment	66	63	-3	6	22	+16
Finding out news about what is happening around the UK	67	53	-14	4	28	+24
Finding out what is happening around the World	68	52	-16	6	30	+24
Knowledge about topics such as arts, science, nature or history	47	43	-4	16	35	+19
Finding out news about what is happening in Sports	55	37	-18	5	22	+17
Finding out about people with values and lifestyles that are different to your own	35	31	-4	13	30	+17
Your personal interests and pastimes	33	30	-3	21	49	+28
Discovering new things	36	29	-7	29	51	+22
Finding out about people with similar interests to your own	14	16	2	26	46	+20

Source: CPP1b, Base: All respondents
2,026 interviews with UK adults aged 16+, August 2014 ;
2,260 interviews with UK adults aged 16+, October – December 2007
The symbol 'v' denotes where a figure is higher than the UK average of all adults aged 16+; the symbol '^' denotes where a figures is lower than the average.
Q: *Which of these is your most important source for this content (2014) / Which of these is your main source for this content (2007)?*

The rise in prominence of the internet as a source of information is likely, in part, to be explained by an increase in access to the internet. In 2007, less than two-thirds (62%) of those who took part in the survey used the internet; this has risen to 84% in 2014. Those who accessed the internet in 2007 were more likely than adults overall to cite the internet as an important source for more personal activities, such as:

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16 In 2007 the question asked people to cite their main source. In 2014, the question asked people to cite their most important source.
17 In 2007 TV was a combination of 'TV on the main channels' and 'TV on digital channels'. In 2014, TV was a combination of 'Scheduled TV or TV you have recorded yourself' and 'On-demand / catch up TV services'.
18 In 2007 Internet was a single code response 'Internet via PC or Laptop'. In 2014, Internet was a combination of 'Websites provided by BBC, ITV, Channel 4 or Channel 5', 'social media', 'websites of newspapers' and 'other websites'.

1. discovering new things (46% those who access the internet in 2007 compared with 29% all adults overall in 2007),
2. finding out about people with similar interests to your own (41% compared with 26%),
3. your personal interests and pastimes (33% compared with 21%), and
4. finding out about people with values and lifestyles different to your own (21% compared with 13%)

As an indication of future behaviour, this suggests that the rise in prominence of the internet in these areas may be linked to a higher proportion of people now being online.

In contrast, there was a smaller difference in the use of the internet as a source of news in 2007. Those who used the internet in 2007 were not much more likely than average to cite the internet as their most important source for finding out what is happening: i) around the UK (seven per cent compared with four per cent): ii) around the world (10% compared with six per cent); or iii) in relation to sports (eight per cent compared with five per cent). This suggests that the rise in prominence of the internet as a media source in these areas is not linked to a rise of people now being online.

Nonetheless, for all the above examples, the 2014 figure for all adults who think the internet is the most important source (including those without internet access) is higher than the figure for internet users in 2007, suggesting societal views are shifting among both internet and non-internet users.

4.1.1 The role of television in society

The quantitative study also explored the role of television in society, and how this compares to the role of the internet. As shown in Figure 4.3, television is valued highly, and there is considerable agreement about the contribution it makes to society. Overall three-quarters of people (75%) agree that television has an important social role to play; this is particularly relevant to the influential role it has in shaping public opinion (83% agree) and in educating people (86% agree that they have learned useful things from television). Compared with 2007, the most notable shift in public perception is a reduction in the proportion who agree that the main role of television should be to provide entertainment rather than information or education (from 27% to 21% in 2014).

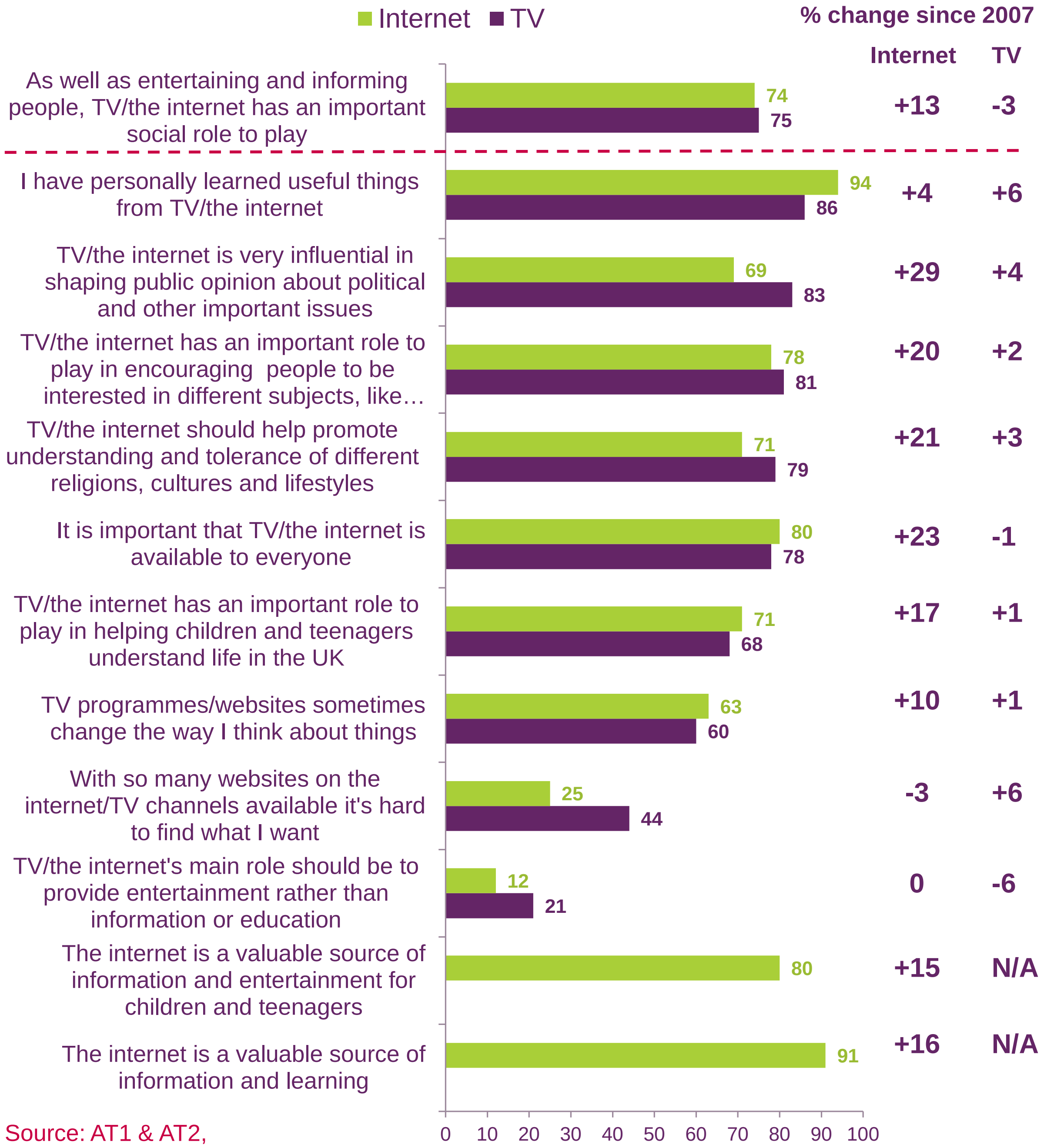
However, as seen below, public perceptions of the role of the internet have shifted considerably since 2007. Overall, people are now just as likely to agree that the internet has an important role to play (74%) as they are that television has an important social role to play (75%) – representing an increase of 13 percentage points on the importance of the internet from 2007. The perceived value of the internet has also grown significantly in the following areas:

- the internet is Influential in shaping public opinion about political and other important issues (an increase of 29 percentage points to 69% agree);
- the internet should help promote understanding and tolerance of different religions, culture and lifestyles (an increase of 21 percentage points to 71% agree);

- the internet has an important role to play in encouraging people to be interested in different subjects (an increase of 20 percentage points to 78% agree).

Also, the proportion of people who think that it is important that the internet is available to everyone is now higher than those who say it is important for all to have access to the television for the first time (an increase of 23 percentage points to 80% agreeing that this is important).

Figure 4.3 – Views of TV/the internet, including an overview of changes since 2007



Source: AT1 & AT2,
Base: all respondents (2,026), 2026 interviews with UK adults aged 16+, August 2014; 2,260 interviews with UK adults aged 16+, October – December 2007

Q: To what extent do you agree with the following statements about...TV/The internet

A number of the shifts in attitudes towards the internet can be explained by changes in the opinion of older generations. Most notably, the proportion of those aged 55-64 who agree that the internet should be available to everyone has increased 32 percentage points since 2007, compared with a rise of just five percentage points among those aged 16-24. The shift in the statements '*the internet should help promote understanding and tolerance of different religions, cultures and lifestyles*' and '*the internet has an important role to play in helping children and teenagers understand life in the UK*' are also largely driven by a shift in opinions of the older age groups.

4.2 Current understanding of PSB

Spontaneous awareness and understanding of Public Service Broadcasting (PSB) remains low, with only a handful of participants from the deliberative workshops able to describe it to some degree prior to its formal introduction in the workshops[19].

Following the video presentation, the older participants more readily appreciated PSB and how it related to the five main channels (BBC1, BBC2, ITV, Channel 4 and Channel 5), as they still thought of these as distinct, although most of these older participants thought the rules applied solely the BBC. Participants of all ages expressed some surprise that Channel 5 had public service obligations.

> *"I'm surprised about Channel 5 being PSB, I thought it was just the BBC."*
> Glasgow 18 - 34

As discussed in the previous chapter, participants under the age of 25 have had access to television beyond the main five channels from a very early age, and increased channel choice was simply their norm. The PSBs did not appear to have such a distinct identity among this age group. The younger audience saw themselves as consumers, shopping around for content that fulfils their desires and needs; they were not familiar with the idea that certain content providers might also provide a public service and were less clear about why this might be necessary. These participants therefore found the concept of PSB harder to understand. As demonstrated in the quote below, younger participants found the distinction between programmes supplied by PSB and non-PSB providers difficult to comprehend.

> *"So, to sum up, Netflix is technically the black market of PSB?"*
> Manchester, 16 - 17

By contrast, older participants, particularly those aged 45 and over, still saw a distinction between the five main channels and the wide range of additional channels and alternative platforms. For them it made sense that there were additional regulatory guidelines for the main channels, whereas this was less distinct in the younger groups.

Despite these differences between older and younger participants, the four PSB purposes themselves and the list of PSB characteristics were largely met with positive reactions across all age groups. Many saw them as worthy and valuable objectives for content providers to aim towards and felt they were reflected in many of the programmes they currently choose to watch. This finding is supported by the quantitative research, which, as discussed further in section 4.1 above, demonstrates broad agreement among the public that television plays number of important roles for society that need to be protected. However, some of the younger participants did not understand why the purposes should only apply to the main five channels.

> *"I think the purposes are important but not what classes as PSB. Any channel could class as PSB. Any channel could show a programme that sticks to the purposes; it doesn't have to be the main channels."*

[19] A short video was produced by Ofcom in collaboration with Ipsos MORI to explain the background to PSB and the purposes and characteristics.

Manchester, 16 - 17

In contrast, a small subset of participants reacted less positively to the PSB purposes, seeing them as overly 'righteous' and 'worthy' and they perceived an implicitly moralising tone. These participants tended to find the purposes hard to relate to and did not think they would want to watch the types of programmes associated with these aims.

"You would expect this in a communist country. Who are they to decide what we watch on TV?"
Newcastle, 35-54

"We don't really care as teenage society about what we watch, we don't sit and think, 'this is really cultural', we just think 'this is fun to watch', 'this is interesting', we don't delve in too much."
Manchester, 16 - 17

4.3 Attitudes to the individual PSB purposes

As part of the video presentation, participants were introduced to the four purposes and key characteristics of PSB. Overall both the purposes and characteristics were received positively. Participants discussed each in turn and generated a list of programmes that they felt aligned to each particular purpose.

Table 4.1 – PSB Purposes and Characteristics

PSB Purposes	PSB Characteristics
Informing our understanding of the world	**High quality**: Well-made, high quality programmes
Stimulating knowledge and learning	**Original**: New programmes made in the UK
Reflecting UK cultural identity	**Innovative**: New ideas and different approaches
Representing diversity and alternative viewpoints	**Challenging**: Programmes that make viewers stop and think
	Engaging: Programmes viewers want to watch

Source: Ofcom

4.3.1 Views of the purposes

Purpose 1: Informing our understanding of the world

This first PSB purpose was received positively by most participants in the deliberative workshops and, on the whole, participants had little trouble thinking of examples of programmes which they thought met this purpose.

Participants across all age groups and life-stages made an immediate association between 'Informing our understanding of the world' and the news, current affairs or news-related programmes including Panorama, Question Time, Channel 4 and ITV News and The Wright Stuff. Many also mentioned programmes that reveal what life is like in other places including

Louis Theroux documentaries, but also shows like Animal Cops Houston which are set in a very particular unfamiliar location. The older groups were more likely than younger participants to mention getting content that informs their understanding of the world through BBC radio content including programmes on the World Service and Radio 4.

Most participants watched a wide variety of programmes, including a number of programmes which they felt had a clear purpose to inform their understanding of the world. Beyond their personal enjoyment of these genres, many also saw a value to society in having programmes which informed young people's understanding of the world. These included specific educational programmes and more generally programmes that were produced with younger audiences in mind.

Figure 4.4 below demonstrates the significance of the news and current affairs programmes like Panorama and Question Time for meeting this purpose.[20] It also shows how the PSB channels BBC, Channel 4, ITV and other Channel 3 services like UTV are seen as playing an important part in delivering on this purpose, through their delivery of news and factual content. Fewer mentioned Channel 5, though The Wright Stuff was given as an example by a small number of participants.

Figure 4.4 –Content mentions; informing our understanding of the world.

Source: Ofcom PSB 2014 Review

Most participants felt that there was plenty of content available to inform their understanding of the world. However, it was also clear from the deliberative workshops that the five PSB main channels are no longer the only places that people are accessing this type of content. For example, some intensive news consumers were also going to specialist channels like Sky News, Russia Today and Al Jazeera for news content. As such, the belief that provision that meets this purpose might be, at least in part, a result of the growing marketplace and increased consumer choice.

[20] During the workshops, participants were asked to write the names of programmes or other types of content which they felt related to each of the PSB purposes on post-it notes. These were later collected and used to produce Wordle images. The higher the number of mentions, the larger the word appears.

Purpose 2: Stimulating knowledge and learning

Similar to purpose 1, there was a general consensus among participants in the deliberative workshops that it was a good thing for individuals and society to have programmes available that stimulated knowledge and learning. Again, participants were able to name lots of examples of programmes which they felt achieved this purpose.

As well as the news, participants associated a wide range of news-related programmes, current affairs, panel discussions, documentaries and quiz shows with this purpose. Specialist channels like National Geographic or History Channel were also mentioned, illustrating how non-PSB providers are also associated with this purpose.

As shown in Figure 4.5 below, educational or quiz programmes (such as University Challenge or educational children's content), and non-programme content (for example the BBC Website and BBC Bitesize) were all given as examples of this type of content[21]. Additionally, specialist channels (such as the National Geographic Channel) not produced by the PSBs were also mentioned. Some participants also felt that reality shows were relevant to this purpose as they often gave people insights into situations that were otherwise unfamiliar to them.

> *"[Murdered by my Boyfriend] helped me a bit, I deal with domestics every day at work. You get numb…"*
> London, 24-28

Some participants in Swansea particularly mentioned the value of Welsh language learning programming for themselves and for Welsh society as a whole.

> *"I just put Welsh channels. I live in Wales and I'm welsh, I'd like to learn Welsh because I wasn't given opportunity as a child to learn Welsh because I didn't go to the nursery school. I'm a nursery nurse and I'd like to learn welsh to speak to the children…so I can take my career further."*
> Swansea, 18-34

[21] Attitudes towards the delivery of PSB content through websites is explored in more detail in chapter 7.

Figure 4.5 –Content mentions; stimulating knowledge and learning

Source: Ofcom PSB 2014 Review

As with purpose 1, participants clearly felt that the PSBs were delivering well against this purpose, demonstrated by the number of programme examples that they gave which are PSB programmes. But perhaps even more so than purpose 1, the content participants noted down demonstrated that while examples of relevant content from PSB providers dominated, participants also thought non-PSB providers show this type of content. For example, Sky News, National Geographic Channel, Discovery Channel and the Food Network were all mentioned more than once in relation to this purpose.

Purpose 3: Reflecting UK cultural identity

This purpose sparked more debate than the first two purposes during the deliberative workshops and some participants found it harder to generate examples of programme that related to it.

Some of the debate centred on the wider question 'What is Britishness?' as many participants felt that UK society today is so multicultural and diverse that the task of reflecting UK identity was fraught with problems.

Some thought that it was a challenging but important objective to have and that it helped to ensure different communities, including their own, felt valued and included as part of the national image. Whereas others complained that there was too much emphasis on being 'politically correct' and that as a result some of the main channels, in particular the BBC, portrayed a disproportionate number of minority groups.

> *"I think at one point it was gay and lesbian characters were it and they were overrepresented…Gay people are a minority, but according to TV they're a majority."*
> Bristol, 55+

Participants in the devolved nations workshops - Swansea, Glasgow and Belfast – often saw this purpose as particularly important for their sense of identity and they felt it was important that they had access to content that was either made locally or reflected life and issues relevant to their communities. This is explored further in section 4.4.

Figure 4.6 below shows that in additional to reality and factual content; many participants associated a range of fictional television programmes (notably the soaps) with UK cultural identity. People wanted to see settings and people that they could identify with and it is generally this personal sense of identification which they thought was important to achieve through PSB.

Figure 4.6 – Content mentions; reflecting UK cultural identity.

Source: Ofcom PSB 2014 Review

Fewer people explicitly mentioned non-PSB providers in relation to this purpose. However, sometimes they were thinking about programmes currently shown on channels such as Dave which had been produced by the PSBs originally.

Purpose 4: Representing diversity and alternative viewpoints

Purpose 4 also sparked lots of different opinions from participants; many struggled to find examples of programmes they watched that represented diversity and alternative viewpoints. Reflecting diversity was seen as important, especially among younger groups. However, there were mixed views on how well this purpose was achieved. News and current affairs programmes were commonly mentioned as reflecting alternative viewpoints, and by far the most common example people gave was Question Time, known for being hosted at different places around the country and deliberately including people with opposing views. Reality shows were also mentioned as they showed people alternative lifestyles. Some were able to recall incidents in fictional shows, such as the soaps, where an ethnic group or alternative lifestyle had been portrayed, but sometimes felt that these had been forced unnaturally into the script just to meet this purpose.

> *"It's which alternative group is currently fashionable – these things go in phases."*
> Bristol, 55+

> *"You would read in the papers that there were loads of complaints to Ofcom- would [programme makers] do it if they don't have to?"*
> Newcastle, 35-54

Figure 4.7 – Content mentions; representing diversity and alternative viewpoints

Source: Ofcom PSB 2014 Review

As with UK identity, people were more likely to mention the PSBs when discussing this purpose. However, some younger people mentioned the increase in online channels which would also address this purpose. Specifically they thought about channels that started as amateur productions but would then attract funding as they became popular which over time meant these channels became more professional and could give a greater voice to the interests and views of their generation.

4.4 Diversity and reflecting UK cultural identity in the devolved nations

There were mixed views in the deliberative workshops in relation to the idea of representing UK cultural identity. Opinions were divided both over whether this was an important aspect of PSB provision and whether there was enough content currently available that achieved it.

Participants in the devolved nations workshops tended to be more receptive to this PSB purpose than those in London and Newcastle. Many living in Swansea, Glasgow and Belfast thought it was good to have programmes that reflect local, regional or national identity[22], whereas many at the London workshop, in particular, were less concerned about ensuring there was enough of this kind of content.

There appeared to be a link between how important participants thought it was to provide this type of content and how well they felt the content they receive currently meets this purpose. For example, many London participants thought that their identity as Londoners was sufficiently well represented in the programmes they watch, although some of the participants from ethnic minorities felt that representation of their ethnic group could be tokenistic. Some of those living in other regions and in the devolved nations – Bristol, Glasgow, Belfast and Swansea – felt that their areas were under-represented and that it was an important purpose to achieve although this was not as prevalent in Newcastle.[23]

The quantitative survey shows that people are predominantly turning to the five main channels for news and current affairs relating to their region or nation as discussed above. This is also the case for other programmes about their region/nation. Only around one in ten viewers of non-news regional content (11%) are using non-PSB channels, making it one of the least watched genres on these channels after news and current affairs. This supports the view among some participants that if the PSBs did not provide non-news regional content then it would be unlikely to be produced.

22 In the deliberative workshops, some participants in Glasgow and Swansea used the term 'national' to mean Scottish and Welsh rather than the whole of the UK. Moderators were sensitive to participants' own language and tried to reflect it as much as possible in their discussions.

23 Bristol participants did not feel as strongly about local coverage as those in the nations, but they enjoyed seeing their city on TV and were disappointed that Holby City relocated to Cardiff (although the Welsh were happy, for the same reason). In Bristol some people felt that there could be more West-country accents on TV.

Table 4.2 – Regular viewing of non-news regional content by nation

		Base (all who watch this content)	TV			
			Any of the 5 main channels (%)	Any of the BBC's other channels (%)	Any of ITV, Channel 4, or Channel 5's other channels (%)	Any other channels (%)
News about and made for people in my nation/region	**Total**	*822*	93	14	20	4
	England	*593*	93	14	17 v	4
	Scotland	*69*	87	14	34 ^	4
	Wales	*84*	90	8	23	4
	NI	*76*	95	14	33 ^	8
Current affairs about and made for people in my nation/region	**Total**	*492*	91	19	25	5
	England	*325*	92	19	23	6
	Scotland	*57*	86	28	41 ^	3
	Wales	*53*	92	4	21	2
	NI	*57*	95	15	12 v	6
Other programmes about and made for people in my nation/region	**Total**	*523*	85	23	23	11
	England	*349*	87	25	24	11
	Scotland	*66*	84	18	23	14
	Wales	*61*	80	13	21	8
	NI	*47*	79	13	17	4

Source: Question CPP2b

Base: All who watch this content (figures in table). UK adults aged 16+, July – August 2014

Q. Which channels or media services do you use to watch this type of programme at least once a month more

4.4.1 Swansea

Opinions were divided among participants in the Swansea workshop; some, usually older participants, thought that there should be more representation of Welsh people on TV while others were less concerned or thought that good quality programmes like Hinterland[24] reflected their identity. Linked to this, some raised concerns that currently the portrayal of Welsh people is quite negative due to programmes like The Call Centre being shown on UK-wide TV and little else reflecting life in Wales. Participants felt quite strongly that stereotyping should be avoided and there were some worries about programmes on the main channels which involved Welsh characters playing the 'stupid one'.

> *"I don't like the way we're portrayed on reality TV – it's like we're stupid…"*
> Swansea, 18-34

There was limited expectation of Welsh-language content on TV and most participants did not raise it as an issue spontaneously. However, some did suggest that they had family and friends living rurally who would appreciate more programmes with Welsh speakers as that would be a fairer reflection of their community.

4.4.2 Belfast

As with participants in Swansea, many in Belfast wanted to see more programmes based in Northern Ireland which featured familiar settings, people speaking in Northern Irish accents and reflected relevant local issues. Some felt that they gained a sense of community and identity through watching television that was produced locally and therefore felt locally produced content would be likely to be more relevant to them.

The deliberative workshops in Belfast took place shortly after July 12th: the anniversary of the battle of Boyne and the peak of the marching season. Some members of the groups commented positively on the BBC's coverage of this, demonstrating how positive association with PSB provision is often linked to seeing local issues and local (or national) identity well represented.

Several participants in Belfast spoke positively about UTV and appreciated having a main channel that was aimed specifically at Northern Irish audiences. Given the particular sensitivities surrounding Northern Irish politics and local communities this was important for the credibility of news coverage.

Participants in Belfast mentioned specifically Northern Irish content like The Nolan Show, Bout Yeh[25], and other Irish language programmes as content they valued.

> *"They had a drama on in Irish with young people in Belfast and another thing where they go round the pubs and have Irish music... it's in Irish though! They translate it, and go into small pubs. They do stuff on ulster scots and try to reflect our side of the divide as well."*
> Belfast, 35-54

[24] BBC crime drama set in Aberystwyth, Wales.
[25] An online soap set in Belfast.

4.4.3 Glasgow

In Glasgow, many were satisfied with the amount and quality of locally produced content, although some felt that that these programmes were clearly lower budget than those shown across the UK. Given the timing of the workshops[26], some older people wanted more coverage of the referendum, while younger participants felt inundated with content covering the referendum and deprived of other types of local content as a result

Some called for more coverage of rural Scotland and events that might be of interest to people living in Scotland, or specific parts of Scotland. They felt that programmes reflecting issues of local interest would be accessible and would contribute to their feeling of local or national pride. However, they were aware such programmes might be less relevant to those living elsewhere in the UK. Also, even within Scotland they felt that it was hard to make programmes that would appeal to people living across the country, and they were keen to see programmes tailored to those living rurally and those living in the cities. Some said that negative stereotypes, particularly relating to Glasgow, are too often found in content, while others thought that Scotland is well represented in comedy and drama.

> *"There is a programme about Glasgow and why people love it so much. It wasn't very well made and it was full of stereotypes that you don't really want people to think about."*
> Glasgow, 18-34

4.5 Views of PSB characteristics

There was broad consensus among participants that the PSB characteristics (see table 4.1) were fit for purpose, and that they covered the key components of what they felt public service content should look like. However, participants also felt that some of the PSB characteristics were attributes that were not necessarily unique to PSB content, for example: *innovative*, *high quality* and *challenging*. Participants were able to list a large number of programmes that contained these characteristics made by both PSB and non-PSB providers alike.

Participants were able to associate most easily with *engaging* and *high quality* content, and felt that all PSB content should be delivering in these areas. For content to be classed as high quality, it had to be both well-made technically and have good subject matter. However, high quality content was not always thought to be defined by the size of its budget, and many could give examples of low budget content (often from non-PSBs) which they felt achieved this.

> *"Sometimes you watch TV that can have really high production values but is boring. The narrative is boring. Shaky cameras can add to the excitement of the programme."*
> Swansea 18-24

[26] The workshops were conducted in July – two months before the Scottish referendum.

Some older groups gave *exclusively* BBC titles as examples of quality programming including: BBC nature programmes, BBC Sports coverage and BBC News, while some younger groups gave *exclusively* American TV shows when discussing quality. Others felt that while there are examples of high quality programming on PSB channels and platforms, they also had programmes which were not of such a high quality.

> *"A lot of PSB is quite cheaply made these days, it involves sticking a camera in front of normal people, like Benefits Street – cheap reality programmes; Homes Under The Hammer, Fake Britain etc. Rather than dramas that are more expensive to make such as Downton Abbey."*
> Glasgow, 18-34

Most were keen to see *original* content that was made in the UK and thought this was important. Some were frustrated that they felt different providers were duplicating programme ideas, rather than coming up with ideas that were truly original.

> *"They seem to be showing some of the documentaries from Sky on BBC or ITV – they call it The Repo Men, BBC calls it Can't Pay or Take it Away – it's the same idea with a different name."*
> Belfast 35-54

Participants found the concepts of *innovative* and *challenging* content harder to define. They also suggested that not all PSB content met or needed to meet these characteristics all of the time. Content was perceived to be *innovative* either in the technique used to produce the content (for example, Peep Show) or in the way in which an old story had been re-told (for example a modern day setting for 'Sherlock'). For some participants *challenging* content was associated with quiz show formats which allowed them to test their own knowledge; for others, *challenging* content forced them to reflect on their own attitudes or behaviours.

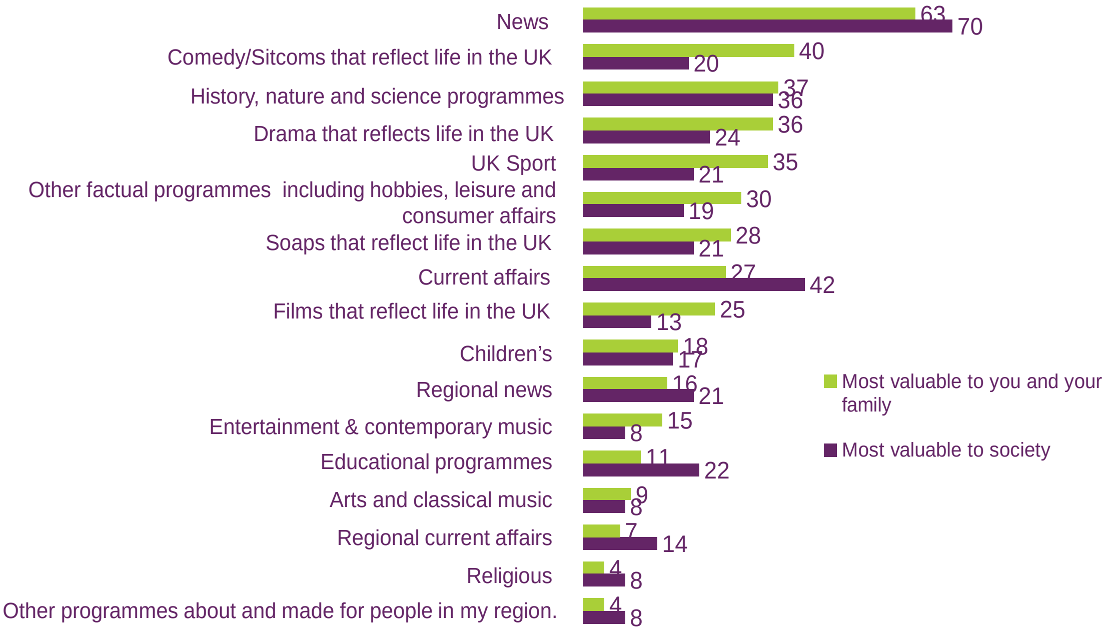
4.6 Views of PSB by genre

The quantitative research explored which types of programmes on the five main channels people consider to be the most valuable to them, and which they consider to be the most valuable for the good of society as a whole.

In both instances, news programmes are perceived to be the most valuable. Just under two-thirds (63%) of people place news as one of the most valuable types of programme on the five main channels to them personally, this rises to seven in ten (70%) who feel it is most valuable for society as a whole. Comedy[27], drama, and UK sport are more likely to be seen as valuable to individuals and families personally (40%, 36% and 35% respectively) than to society as a whole (20%, 24% and 21%). In contrast, current affairs and educational programmes are perceived to have greater value for society as a whole (42% and 22% respectively) than for individuals (27% and 11%).

[27] However, as outlined later in the report, when people deliberated about the value of comedy many realised it was a genre well suited to addressing the four PSB purposes and thus of greater value to society than they first thought.

Figure 4.8 – Genres of programmes considered to be most valuable



Source: Questions GV1, GV2. Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: A - Which of the five programme types do you consider to be the most valuable to you and your family on the five main channels? B – Please tell me which five you think are the most important for these five main channels to provide for the good of society as a whole?

Young people aged 16-24 years were more likely to say they value comedy, films and entertainment and contemporary music on television than any other age category. People aged 65 and over tend to value more regional news (23% compared with 16% overall), whilst the higher socio-economic groups are more likely to personally value news, current affairs and factual programmes compared with C2DE audiences.

Table 4.3 – Extent to which regional programming is personally valued by geography

	Base	Regional news (%)	Regional current affairs (%)	Other regional programmes (%)
England	*1541*	14	6	5
Scotland	*170*	21 ^	10	15 ^
Wales	*165*	20	11	11 ^
NI	*150*	34 ^	20 ^	11 ^

Source: Question GV1
Base: UK adults aged 16+ (2,026), July – August 2014
The symbol 'v' denotes where a figure is higher than the UK average of all adults aged 16+; the symbol '^' denotes where a figures is lower than the average.
Q. Which are the five programme types you consider to be most valuable to you and your family personally on the five main TV channels?

Those living in Northern Ireland were more likely to value regional news and regional current affairs than any other region, with one third (34%) listing regional news in their five most valuable genres, and one fifth (20%) mentioning regional current affairs. Those living in Scotland watched more ‘other regional programmes’ (15%) with Wales and Northern Ireland watching a similar amount at 11%.

4.6.1 Assessment of the content produced by PSB providers

The results of the quantitative survey show that the five main channels remain firmly in peoples’ viewing choices. BBC One is reportedly watched by the majority (80%), well over half watch ITV[28] (67%) and Channel 4 (60%) and BBC Two (55%), and slightly less than half watch Channel 5 (43%). Fewer than one in ten (8%) people say they watch none of the five main channels. But, as explored in earlier sections, the main channels are far from the only popular providers of PSB-type content and over half (56%) of all adults are also turning to non-PSB providers including both free to view channels (38% use) and subscription channels (33% use). This section of the report explores people’s perception of PSB-type content by genre, comparing content provided by PSBs to that provided elsewhere and drawing on the claimed viewing behaviour captured in the quantitative survey shown in Table 4.3.

As noted above, many participants in the deliberative groups, in particular younger and middle aged participants, discussed the range of PSB-type programmes they watched on non-PSB channels. Some felt that only a subset of providers, however, offered them good quality PSB-type content and that the main channels were more reliable sources of quality programmes. But others, often with more experience of accessing the wider network of channel options, were confident that they could find good PSB-type content elsewhere on Freeview channels, subscription channels and on demand services. In several cases, participants said that they were accessing old PSB programmes that were no longer available through the PSBs but easily found on other channels like Dave and through online services such as Netflix.

[28] Including STV, UTV and ITV Wales

Table 4.4 – Use of channel by genre

	Base size (all who watch this content)	TV: Any of the 5 main channels (%)	Any of the BBC's other channels (%)	Any of ITV, Channel 4, or Channel 5's other channels (%)	Any other channels (%)
News about and made for people in my nation/region	*822*	93	14	20	4
Current affairs programmes	*841*	92	26	18	8
Current affairs about and made for people in my nation/region	*492*	91	19	25	5
News	*1437*	90	27	19	16
Soaps that reflect life in the UK	*677*	89	17	32	8
Drama that reflects life in the UK	*1111*	86	30	40	21
Educational programmes	*553*	86	38	26	19
Other programmes about and made for people in my nation/region	*523*	85	23	23	11
Programmes that reflect the lives of different communities/cultures in the UK	*469*	83	39	32	19
Religious programmes	*191*	82	23	15	17
Other factual programmes	*1029*	80	28	35	33
Arts and classical music	*477*	78	43	17	21
Comedy and sitcoms that reflect life in the UK	*1161*	77	34	40	41
UK Sport	*855*	77	18	27	46
History, nature or science programmes	*1142*	76	35	24	32
UK Entertainment and contemporary music	*645*	75	24	37	23
Films that reflect life in the UK	*873*	72	28	49	32
Children's programmes that reflect life in the UK	*349*	40	65	24	27

Source: Question CPP2bBase: All who watch this content (figures in table). UK adults aged 16+, July –August 2014
Q. Which channels or media services do you use to watch this type of programme at least once a month more

News

Participants in the deliberative workshops often favoured the PSBs for news content and saw them as trusted, reliable providers of these programmes. Most participants claimed to use at least one PSB provider for their news content and accessed this on a regular basis. However, some questioned whether it was necessary for the news to be shown on several of the main channels at the same time, especially as the 24 hour news channels were always available.

The quantitative research highlights the standing of PSBs as a source of news, with the majority (90%) of people who watch news content at least once a month using one of the five main channels to do this. The youngest consumers (those under 25) and the oldest (those over 54) were most likely to only watch the five main channels for news. Those between the age of 25 and 44 were using a wider range of providers in addition to the five main channels. Similarly, over nine in ten (93%) viewers of news about the nations and regions use the five main channels and only 4% use online sources for this kind of content.

As discussed in the previous section, many participants in the deliberative workshops highly valued plurality for provision of news content. Keen news consumers often sought more than one news source and sourced additionally from alternative providers, namely specialist news channels like Al Jazeera and Russia Today. Many participants were satisfied that the main PSBs provided viewers with a relatively balanced and unbiased perspective, however, a minority of often older respondents thought that the BBC was less reliable, and gives a "reflection of the government view". Others felt that it was becoming increasingly hard for a single provider to fully document events or cover the range of relevant viewpoints. As such, they were curating their own news provision, often drawing on a mix of PSB and non-PSB sources.

Several participants were more hesitant about news provision on Channel 5 and did not see it as one of the core providers of news programmes, with some suggesting it was mainly 'light' or celebrity focussed news.

Sky was mentioned by participants in the deliberative workshops as one of the main alternative sources of television news content. Opinion tended to be split over the quality of its provision, however. Some participants defaulted to Sky news citing the quality of news as the main reason. Others were more critical of the tone and style of news reporting on Sky. These viewers often claimed to prefer BBC news coverage.

> *"The tone of Sky News can be bit sensationalist."*
> Swansea 55+

Factual

Participants saw strong connections between factual programming and PSB channels in the deliberative workshops, in particular with the BBC One and Two and nature programmes and Channel 4 and BBC Three and documentaries focussing on alternative lives (such as Don't Call Me Crazy and One Born Every Minute). The quantitative data suggests that of those watching history, nature or science programmes three in four (76%) are watching on PSB channels; similarly four in five (80%) of those watching other factual programing use PSB channels.

> *"Channel One has always done nature but [Channel] Four does a lot of stuff like kids on death row…a lot of gritty factual stuff."*
> Newcastle, 35-54

> *"BBC and channel 4 probably do the best factual."*
> London, 16-24

Factual programming on non-PSB channels was also popular with participants, including specialist channels like Yesterday, the History Channel and more generalist channels like Dave. Some younger and middle aged viewers felt that the factual programming from other providers like Vice or Netflix is more engaging for them than that offered by PSB channels. The quantitative research supports this. Of those who watch factual and historical content, around one in three consume it away from PSB or portfolio channels (33% and 32% respectively) making this type of content one of the most popular genres after sport for content consumed through non-PSB or PSB portfolio channels . However, viewers of history, nature or science programmes aged 55+ are more likely to watch this content via PSB channels (87% compared with 76% overall).

> *"[Talking about Vice vs. BBC] They're much cooler. The people who do the documentaries are people I'd want to hang out with. They do fashion stuff. I watched a documentary on skin bleaching in Jamaica and it was so informative. They sent people out who were much more contemporary."*
> London, 28-35

As covered in more detail at Section 5.5, the content on dedicated factual channels available through non-PSB providers is often repeats of shows originally aired on the PSB channels, though also contains repeats of factual programmes originally made for Sky or from outside the UK, examples of which were readily given by participants.

Drama and soaps

Participants in the deliberative events were satisfied with the quality of drama and soaps available from the PSBs and many of their favourite dramas and soaps were currently broadcast on these channels.

However, there was not as strong a sense that PSB dominated this type of viewing in the same way that it dominates news. Participants, especially younger participants, were increasingly viewing imported drama from alternative services such as PSB portfolio channels, like E4, and online on demand services like Netflix. Many appreciated long-running US series and wished that UK-made PSB productions lasted a similar length.

> *"[on British shows] you get 3 or 4 episodes, they hook you in but you have to wait a year, with Netflix, and the American TV series, you get 20 episodes or 24."*
> London, 24-28

They valued the fact that they had access to a greater amount of content and they say they often felt disappointed and 'cheated' by the comparatively short UK series found on the PSBs.

The quantitative data confirms that, while a high proportion of people who watch drama and soaps do so on the five main channels (86% and 80% respectively), they are also watching drama elsewhere. Two fifths (40%) of those who watch this drama do so using ITV, Channel 4 and Channel 5 portfolio channels, and just under a third (30%) using the BBC's portfolio channels. One-in-five (21%) are watching drama on 'other' television channels.

As with other genres, those who watch drama aged 55+ are more likely to watch the main five channels (92% compared with 77% of those aged 16-34). There is much less variation by age when it comes to watching soaps, with 88% of 16-34s and 90% of those aged 65+ who watch soaps doing this on PSB channels.

Sports[29]

Overall, participants in the deliberative groups were satisfied with the quality of sports coverage provided by the PSBs, but felt that it sometimes dominated scheduled TV at the expense of other genres. Some participants questioned whether the PSBs should all broadcast a main sporting event as by doing so they were seen to be prioritising sport over other genres and overlooking the needs of other viewers.

According to the quantitative survey, sports viewers rely heavily on the PSB channels and scheduled TV for watching sport; most who watch sport at least once per month (77%) consume it on one of the five main channels. Other channels also featured heavily, with just under half of viewers (46%) turning to alternative non-PSB providers to watch sport, this drops to a quarter (26%) of those aged 65+, compared with 54% of those under 55.

Comedy

Many participants in the deliberative workshops spontaneously discussed comedy as a genre they value and most enjoyed comedy programmes provided by the PSBs. However, many were also using specialist comedy channels although in some cases they were using them to watch reruns of old PSB content. Therefore, while the PSBs go some way to satisfying people's needs for good quality comedy content, many do not see them as the core providers of this genre.

> *"I think strand up comedians often reflect UK culture more than others. I think I like stand up and I watch most of it on Sky rather than on terrestrial TV."*
> London28-35

Several participants emphasised that comedy was a very important genre for them and felt that it had the potential to achieve many of the PSB purposes. Some believed that it could be a more engaging way of delivering content that informed, stimulated learning, reflected UK cultural identity and represented diversity and alternative viewpoints. Younger participants in the deliberative workshops often provided examples of comedy programmes when discussing content they currently watched that reflected the PSB purposes. Furthermore, they thought that comedy programmes delivered sometimes serious messages

[29] The deliberative workshops took place in July 2014 around the time of the World Cup and Commonwealth games.

about current affairs and cultural diversity using a humorous tone which helped to engage a wider audience and it was therefore important to have more content like this.

Some participants in the deliberative workshops believed that comedy was particularly relevant for reflecting UK cultural identity as they felt British humour was a defining national characteristic. Many currently watched American comedy and sitcoms and said that this was, at least in part, because the options for good British-made comedy were limited. Furthermore, some thought that standards had declined and that UK-based comedy used to be better.

> *"The last one I liked was Little Britain, but that was 10 years ago."*
> London 28-35

The results of the quantitative survey support the view that comedy is popular, but that people's needs are not necessarily being fully met by the PSBs. Although most of those who watch comedy still watch it on the five main channels (77%) this is a lower proportion than observed for the other genres. This drops to 61% for those ages 16-24s, though as per other genres, remains popular with comedy watchers aged 65+, 89% of whom watch on the PSB channels. Comedy is the second most commonly watched genre on the non-PSB channels (used by 41% of regular comedy viewers and 47% of those aged 35-54) and is also one of the genres which are most commonly watched on the PSB portfolio channels. Along with films, comedy is the genre people are most likely to view using on demand services.

Reality TV

Many participants in the deliberative events enjoyed watching reality TV and named a number of different programmes that they classed under this genre, ranging from documentary-style shows like Benefits Street to staged-productions like Big Brother. Many of the examples participants mentioned appeared on the PSB main channels.

Not only were many participants watching reality TV, but they also believed that these programmes were relevant to the PSB purposes and, like comedy, were able to deliver PSB in a way that reached a wider and younger audience.

Several made the point that in order to be good quality, reality TV shows needed to depict the lives of real people in a genuine and balanced way and should not reinforce stereotypes or be too obviously scripted or contrived. For example, programmes such as Gogglebox and 24 hours in A and E, while offering compelling viewing, were sometimes described as "fake reality" or "scripted reality".

> *"I just don't know what's on TV anymore. Is it a documentary or is it just acting?"*
> Bristol 55+

Similarly, programmes such as Benefits Street or Call Centre were seen to only portray a small and stereotyped part of UK life, and some felt there was potential for broadening out the realities portrayed through programming.

Participants said they enjoyed watching reality TV shows both as a way of relating to people like themselves who they witnessed leading similar lives and as a way of gaining an insight into the lives of others who are different from them. Many thought that to achieve the PSB purposes, particularly 3 ‘reflecting UK cultural identity’ and 4‘representing diversity and alternative viewpoints’, there needed to be more content that accurately depicted how people live in the UK today.

> *“[Benefits Street] educates people, stops them being ignorant about things, benefits street showed them how they really live, my mums friends were really snide about benefits people before.”*
> Brighton, 16-17

Provision for family viewing

Some participants in the deliberative events thought there was a gap in provision of programmes which they thought were suitable for families to watch together. They thought that this was particularly pertinent in relation on Saturday night viewing. Saturday evenings are seen as a time for families to relax together, but some felt that current provision did not cater for younger viewers and in some cases was inappropriate.

4.7 Generations analysis

4.7.1 Tech natives (typically aged 16-30)

This group were least likely to be familiar with the concept of PSB, although a handful thought it might have something to do with the BBC. Like other participants, they felt the purposes and characteristic were ‘about right’ and in particular, they valued the purpose around diversity and alternative viewpoints. However, some struggled to see why they were limited to the first five channels, which they are less likely to think of separately from the other channels available to them. Fewer than half of young people now think that the TV is their most important source for relaxing or entertainment and they are more focussed on programmes than channels or providers.

- Unfamiliar with the concept of PSB, and less likely to think of the ‘main five’
- Most likely to value diversity and alternative viewpoints
- Fewer than half of young people aged 16-24 think TV is the most important source for relaxing and entertainment.
- More likely than other age groups to consume comedy, films and entertainment on the TV.
- They are the age group least likely to use PSB channels to watch comedy
- The internet dominates amongst this group, however the youngest (16-17s) still value the TV as much as the internet for finding out what’s happening in the world.
- More focussed on programmes than providers
- Most likely to associate American programming with quality

4.7.2 Tech learners (typically aged 30-55)

The view that TV is the most important source for relaxing and entertainment is still maintained by a small majority of middle-aged people. This group were not familiar with PSB, but like the tech natives they felt the purposes and characteristics were about right. They were more likely to think of the ‘main 5’. Some individuals in this group were avid consumers of news content, and were comfortable with looking beyond PSB providers for current affairs content.

- A majority still think TV is the most important source for relaxing and entertainment
- Most think in terms of the 5 ‘main channels’
- Mostly unfamiliar with the concept of PSB
- Consume PSB-like content from across PSB and non-PSB providers, in particular comedy and factual
- The heaviest consumers of news content (including from multiple PSB and non-PSB providers) were likely to be found in these groups

4.7.3 Traditionalists (typically aged 55+)

In contrast to younger participants, TV remains the most important source for this group personally, though they increasingly appreciate the role of the internet for society as a whole. While still not all familiar with PSB as a term, participants in this category were most likely to think in terms of the ‘main 5’ or even ‘main 4’ and some were familiar with the history of regulation in this area. They have strong associations between BBC and quality.

- TV continues to be most important source for relaxing and entertainment
- However, since 2007 they increasingly value the role of the internet for society
- All think in terms of the 5 ‘main channels’ , though some may not think of Channel 5 in this way – some consume entirely PSB content
- More familiar with PSB
- Most think there is value in seeing regions represented, more likely to watch regional news
- Very strong links between BBC and quality content

5 The future value of PSB

5 The future value of PSB

This chapter explores what type of public service content the public would like in the future and what role PSB providers should have in providing it. More specifically, it uncovers how PSB content should continue to inform and stimulate knowledge, reflect UK cultural identity, and reflect diversity and alternative viewpoints.

Key findings

- Overall people feel the PSB purposes remain important for the future.
- Given the plethora of content, consumers agree that the priority for providers should be to produce high quality public service content, with an increasing emphasis on the importance of originality.
- However there is concern, especially among older age groups, that some of the values of PSB will be lost if provision of content is left purely to the expanding marketplace.
- People are concerned about the future of programmes designed to achieve desirable purposes (such as *reflecting UK cultural diversity* and *representing alternative viewpoints*) may be expensive to make and might have lower viewing figures, and whether viewers would be less likely to stumble across content that may be informing and stimulate knowledge
- Opinion is divided as to whether content must reflect life in the UK as a whole or reflect the needs and concerns of specific communities. People also have mixed views about how television should represent diversity and alternative viewpoints.
- Attitudes towards the future of PSB were generally related to belief in the market, which did not map neatly onto generations. For example, generally the very youngest participants were more likely to think that the market would provide quality, but they were also concerned that content should be produced which reflects diversity, and worried that the quality of news would drop without regulation. Further generational analysis is explored in section 5.6.

5.1 The role of PSB in ensuring high quality content

There was broad consensus among participants at the deliberative workshops that the PSB purposes and characteristics are worthy aims and that there is societal value in content that meets these requirements. However, opinion was mixed on whether regulation is needed to meet these purposes and characteristics[30]. There was also a consensus view that a future priority was ensuring the provision of high quality content, and many felt this should include

[30] In order to facilitate the discussion regarding the future value of PSB, a deprivation technique was used where people were asked to consider a world where no PSB existed. This enables people to take a more extreme considered viewpoint on its value. It is understood that this is not a real scenario under consideration.

content that met the four PSB purposes. However, participants were, again, divided on whether there was a need for regulation to guarantee high quality content.

Some participants felt that broadcasters' brand positioning' would ensure quality, and they would continue to produce high quality output that maintains a healthy audience share.

For example, many participants believed that national news gave broadcasters legitimacy therefore felt that they would continue to provide national news content even if it was expensive to produce and subject to competition from other non PSB providers. Some people also thought original and engaging UK content was important for the PSBs identities. BBC1's David Attenborough programmes and Sherlock, BBC2's The Office, ITV's Downton Abbey, and Channel 4's youth orientated UK programming like Skins were all seen as examples of programmes that were integral to the brands of PSB providers.

These, mainly younger participants, felt that if certain content types are important enough to the public, or watched by enough people, then providers will continue to make it without the need for regulation. For example, they pointed to specialist religious channels as evidence that niche interests can be served by broadcasters without PSB obligations.

However there were others who felt that quality programming is not currently widely made by non-PSB providers and expressed concern that it would not be made without regulation. For these participants, high quality content has been driven by the regulatory framework, and thus they thought it would be important to keep PSB regulations as it is not clear what else might ensure high quality in its absence.

> *"Other channels would come forward and take that on if they weren't there. There aren't British dramas on other channels though!"*
> Belfast, 35-54

Researcher observation on discussing PSB in 2014

Compared with the qualitative research conducted in 2007, it was observed that participants in 2014 found it more difficult to define PSB and its value in content production. This task was noticeably more difficult for younger people, who, having grown up in a marketplace which delivers additional PSB-like content, from both PSB and non-PSB sources, were less likely to think that the programmes they value on PSB channels and elsewhere are the product of PSB regulation.

As a result, it was harder for younger people to understand the role of PSB regulation in delivering high quality content and to imagine how television content would be different if PSB regulation did not exist.

This change in the way people understand PSB is important context to the attitudes and preferences explored throughout this chapter.

5.2 The role of PSB in informing understanding and stimulating knowledge

The purposes of 'informing understanding of the world' and 'stimulating knowledge and learning' were seen by participants in the deliberative workshops as important for society and future generations. This is in line with findings discussed earlier that show people understand television to have a wider societal value than simply to entertain; and is supported further by the quantitative study, which reveals that news programmes are the genre most likely to be seen as valuable to society – seven in ten (70%) believe this is the case.

However, as the way viewers consume content moves increasingly online and on demand, some participants expressed concern that people would be less likely to stumble across content that may inform understanding and stimulate knowledge, and more likely to engage with content on a self-selecting diet of their favourite shows. They thought that the PSBs should make programmes that were informative by making them engaging and high quality so they can compete for audiences' attention, but recognised it would be challenging.

The qualitative discussions also showed that people value plurality in news provision, and valued the different perspectives of the PSB providers. Despite the range of choice outside of traditional PSB provision, including other television news channels as well as online news sources, people still believed it was important for BBC, ITV and Channel Four to broadcast the news.

High quality non-biased provision of news and current affairs was seen as vitally important by some participants, across the age range. It was also considered to be something that the market is unlikely to provide without an obligation to inform and stimulate knowledge, although others disagreed.

> *"If they took away the obligation three of the four channels may drop the news, they may think if BBC one show it, we won't and [they would] show something else."*
> Newcastle, 35-54

> *"The news is really important, the BBC is unbiased, because it's state run. It's not a private company like Sky. It could turn into Fox news like in America."*
> Brighton, 16-17

Some questioned whether content providers would produce content that is expensive to make (such as local news) or that was tailored to a niche market with lower viewing figures.

5.3 The role of PSB in reflecting UK cultural identity

As outlined in Chapter 4.3, participants in the deliberative workshops debated the value of 'reflecting UK cultural identity' and some were unsure exactly what "UK identity" meant. However, some were concerned that without PSB some of this type of content would be lost. For example, some felt that without this PSB purpose, provision of local programming, which included local news and also (to a lesser extent) cultural and entertainment programming with a local dimension, might be lost. They noted that many of the non PSB providers do not provide any local programming, and felt that UK produced content struggles to compete with content made abroad that reflects life elsewhere.

> *"With things like Netflix there is less of a British identity."*

Glasgow, 18-34

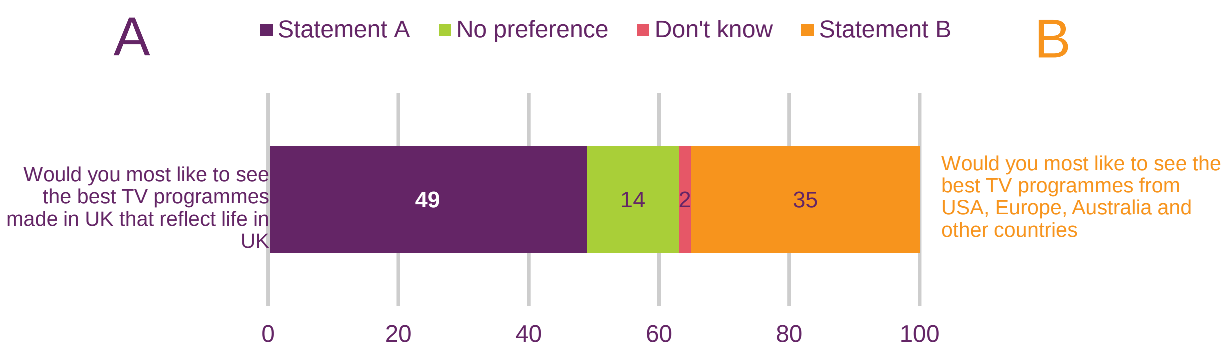
However, others felt that since a lot of BBC and ITV content with a strong UK cultural identity is repeated on non-PSB providers like Netflix, the market would ultimately deliver this type of content to meet the consumer demand for this, without regulation. They thought that in the future content that met this purpose would be demanded by audiences and therefore would be produced by commercial companies seeking audience share, and it would have to be high quality and appealing enough to compete with other types of content.

"Netflix have a lot of BBC and ITV shows, so there must be an appetite for PSB content."
Glasgow, 18-34

As shown in Figure 5.1 below, when asked to make a choice between two opposing statements, findings from the quantitative research suggest that half (49%) of people would prefer to receive *the best programmes made in the UK that reflect life in the UK* (49%) compared with a third (35%) who would prefer the best *television programmes from the USA, Europe, Australia and other countries*.

Attitudes vary by age; almost half of 16-24 year olds, (48%) would prefer the best content from around the world. Older people are more likely to want UK made content, with this being particularly the case for those aged 65+ (62%). Ethnic minority groups are just as likely to want to see the best content from around the world (41%) than they are to see the best content that is made in and reflects the UK (40%).

Figure 5.1 – Preferences between UK programmes and those from other countries



Source: Questions, HC3, Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: What would you most like to see? [A] or [B]?

Compared with 2007, there has been a rise in the proportion of people who would prefer to receive the best television content from abroad, from 22% in 2007 to 35% in 2014. As shown in Table 5.1 below, demand for this type of content has risen most notably among adults aged 45-54 (from 16% in 2007 to 37% in 2014) as well as younger adults aged 16-24 (from 31% to 48%).

Table 5.1 – Rise in proportion of adults with a preference for content from abroad

		What would you most like to see? (Percentage point change from 2007 to 2014)[31]	
		A: the best TV programmes made in the UK that reflect life in the UK	B: the best TV programmes from abroad
	Overall	-9	+13
Age	16-24	-8	+17
	25-34	-4	+9
	35-44	-7	+10
	45-54	-21	+21
	55-64	-10	+10
	66+	-9	+8

Source: Question HC3
Base: All adults aged 16+ (2,026), July – August 2014; All adults aged 16+ (2,260), October – December 2007
Q. Which would you most like to see? [A] or [B]?

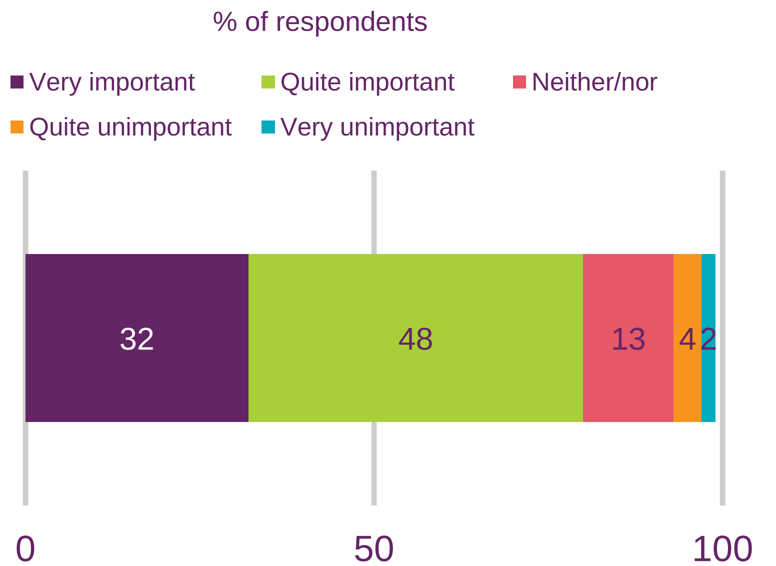
5.3.1 Role of PSB in producing content that shows different parts of the UK

Participants reflected on the high cost of producing content for specific local areas, compared with the small number of local viewers, but they felt that content such as local news helped them to feel connected to their local community. Local news formed part of a local identity, and it therefore had a societal and cultural value beyond viewer numbers to some participants.

The value of local programming is explored further in the quantitative research. When asked specifically, four in five of people (80%) say it is important to them that the five main channels provide programmes that show different parts of the country.[32]

[31] In 2007 the question wording read: a high proportion of programmes made in the UK or The best TV programmes from the USA, Europe, Australia and other countries
[32] However, it should be noted that in context when asked what the types of programmes are most valuable to society as a whole, few people specifically cite regional news, current affairs and other programmes (see section 4.6).

Figure 5.2 – Value placed on PSB providing programmes that show different parts of the UK



Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: How important is it to individuals that the BBC, ITV STV/UTV, Channel 4 and Channel 5 provide programmes that show different parts of the UK including England, Northern Ireland, Scotland and Wales?

The importance of the five main channels providing programmes that show different parts of the UK including England, Northern Ireland, Scotland, and Wales is higher for older people than for the younger age categories. Two fifths (40%) of those aged 65+ consider this to be very important, compared with 17% of 16-17 year olds, and 25% of 18-24 year olds. Younger age groups appear more ambivalent on the matter, with 30% of 16-17 year olds finding it neither important nor unimportant. This reduces to 16% of 18-34 year olds, and even further to 7% of those aged 65+.

All four nations are in broad agreement that showing different parts of the UK is important, but the strength of sentiment is stronger in Scotland and Wales. Just under half of those in Scotland (46%) believe it is *very important* for the five main channels to provide programmes that show different parts of the UK, and similarly 42% in Wales feel the same way compared with 30% in England and 24% in Northern Ireland saying it is very important.

5.4 Representing diversity and alternative viewpoints

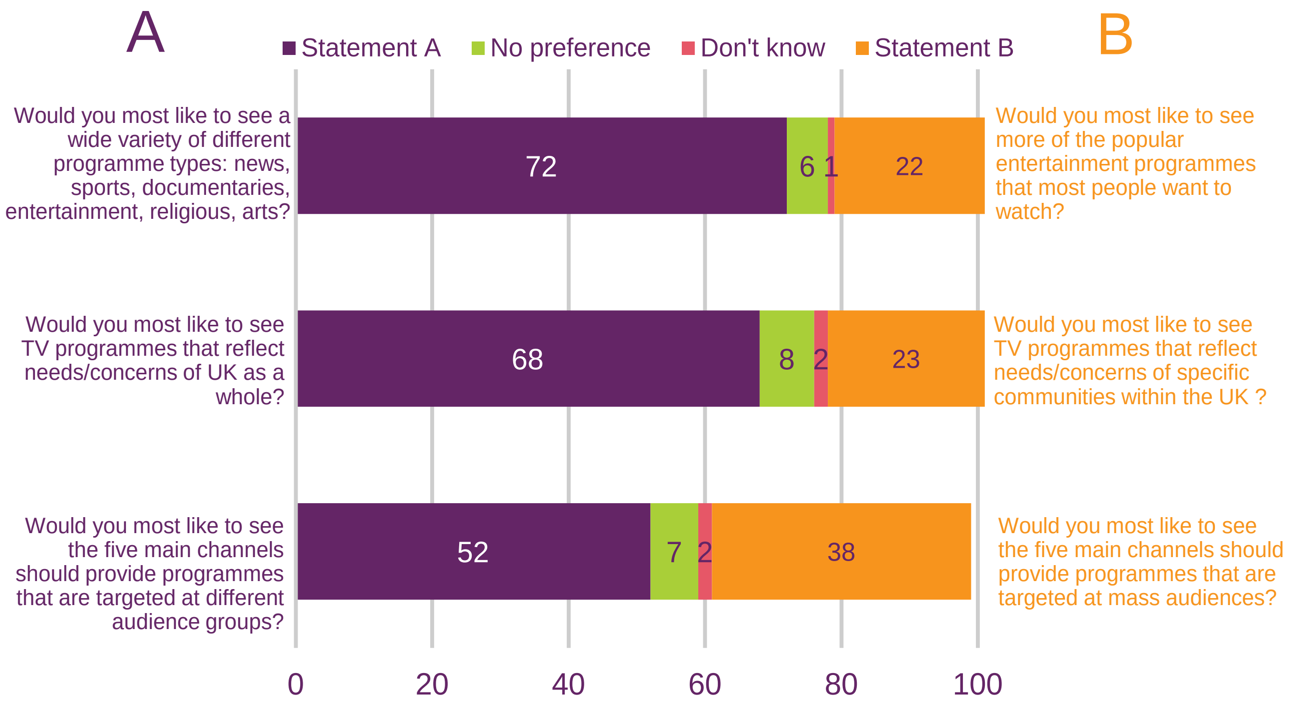
Opinion was also divided on whether diversity and alternative viewpoints would be catered for by the market or whether regulation is needed to ensure this content is made and distributed. As mentioned above, some pointed to the proliferation of niche channels like the God Channel as evidence that PSB regulations may not be necessary. A vocal minority in the Swansea workshop were adamant that Welsh language programming needs to be protected.

> *"[on Welsh language] If they're not being watched anyway there's not much point."*
> Swansea, 18-34

> *"There is a need for them because even if the market is small, niche, it's still important."*
> Swansea, 18-34

Findings from the quantitative research suggest that preferences for the way in which television content represents diversity and alternative viewpoints are increasingly mixed. The survey looks at three aspects of representing diversity and alternative views: the types of programmes; who is reflected in them; and who they are targeted at. The overall findings are shown in Fig 5.3 below. There are differences by age which are discussed further below.

Figure 5.3 – Preferences between different kinds of programmes: what would you most like to see?



Source: Questions HC1, HC2, HC5
Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+, July – Aug 2014
Q: What would you most like to see? [A] or [B]?

Also, since 2007 there have been significant changes in views on all three, as shown in the table below.

Table 5.2 – Preference for representing diversity and alternative viewpoints: change over time

		What would you most like to see? (Percentage point increase from 2007 to 2014)		
		A: Wide variety of different types of programmes	A: TV programmes that reflect the UK as a whole	B: Target at mass audiences
	Overall	+13	+4	+17
Age	16-24	+20	+3	+19
	25-34	+12	+4	+28
	35-44	+10	+8	+16
	45-54	+16	-2	+12
	55-64	+15	-1	+17
	65+	+10	+9	+14

Source: Question HC1, HC2 and HC5
Base: All adults aged 16+ (2,026), July – August 2014. All adults aged 16+ (2,260) October – December 2007
Q. Which would you most like to see? [A] or [B]?

5.4.1 Type of programme

As shown in Figure 5.3 above, there is broad support for the provision of a wide variety of different programme types; just under three-quarters (72%) prefer this option rather than showing more popular entertainment programmes (22%). Men (78%) are more likely than women (65%) to favour variety over more popular entertainment programmes.

A comparison to 2007 reveals greater consensus among the public in the variety of content that should be produced. As shown in Table 5.2 above, people are now more likely to prefer a wide variety of different types of programmes (up from 59% in 2007 to 72% in 2014). The change in preference is most notable among those aged 16-24 (an increase of 20 percentage points from 2007, from 45% to 65%).

5.4.2 Who should programmes reflect?

However, although there is support for a wide variety of programmes, people would prefer these to reflect the UK as a whole (68%); less than a quarter (23%) would prefer television content that reflects the needs and concerns of specific communities within the UK (such as religious, ethnic, regional or national).

Younger people were more likely, to say that they would rather have programming which reflected the concerns of specific communities. Around one third (32%) of 16 - 24 year olds said that they would prefer programming which reflected the needs and concerns of specific communities, compared with 18% of those aged over 55. People from ethnic minority groups are twice as likely as those from White British or Other White groups to want to see content that reflects the needs and concerns of specific communities within the UK (39% compared with 20%).

Though there is a clear preference for programmes that reflect the needs/concerns of the UK as a whole, both sides of the debate have seen an increase in support compared with 2007. The proportion of people who prefer programmes to reflect the UK as a whole has increased from 64% in 2007 to 68% in 2014; at the same time, those who would prefer programmes to reflect specific communities within the UK has risen from 20% to 23%.

5.4.3 Who should programmes be targeted at?

The public have relatively divided expectations of the main five television channels regarding targeting content at specific audiences. More than half (52%) of people feel that they should provide programmes that are targeted at different audience groups, while 38% would prefer them to provide programmes that are targeted at mass audiences. Younger people aged 16-24 and those from Northern Ireland are most likely to want see the main five channels as a place for mass-audience content, (45% and 47% respectively). Conversely, almost three in five (58%) of those aged 65-74 want to see range of programming on the main channels.

The public are more polarised on this issue in 2014 than they were in 2007. In 2007, people were three times as likely to state a preference for programmes targeted at different audience groups rather than programmes targeted at mass audiences (64% compared with 21%); however this gap has since reduced from 42 percentage points to 14 percentage points in 2014. The proportion that would prefer programmes to be targeted at mass audiences has risen 17 percentage points, from 21% in 2007 to 38% in 2014. This change is most notable among adults aged 25-34 (a rise of 28 percentage points).

5.5 New and original content

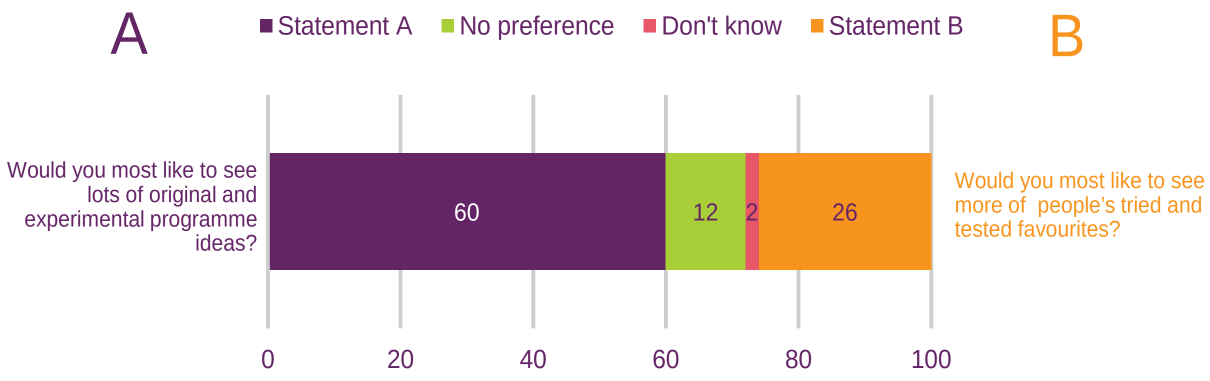
While most people in the qualitative workshops generally felt that innovation in content was a good thing, they were less animated on whether this was a priority to maintain, compared with the other characteristics. Some users of YouTube pointed to the model of investors identifying popular contributors and backing them as a way of identifying new and innovative content.

> *They get sponsored so they can afford to use better cameras and better editing software*
> Swansea, 18-34

Meanwhile, in the quantitative research three in five (60%) want to see lots of original and experimental content, while over a quarter (26%) are keen to see more tried and tested favourites. Older people are less likely to support original content over old favourites, with just 36% of those aged 75+favouring original, compared with 65% of 16-34s and 36-54s. This was mentioned by an older participant in the qualitative research who felt that experimental programming without quality is not necessarily progress.

> *[Thinking of Alan Carr] It's just being daft. Instead of quality*
> Bristol, 55+

Figure 5.4 – Preference for original content over tried and tested favourites



Source: Questions, HC4, Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: What would you most like to see? [A] or [B]?

Preferences for original and experimental content has grown in recent years (up from 42% in 2007 to 60% in 2014). This change is most notable among younger adults aged 16-24 (a rise of 28 percentage points), but is also apparent in those aged 44-54 (a rise of 24 percentage points) and those aged 25-34 (a rise of 21 percentage points).

Table 5.3 – Preference for type of content: change over time

		What would you most like to see? (Percentage point increase from 2007 to 2014)	
		A: Lots of original and experimental programme ideas	B: more of people's tried and tested favourites
	Overall	+18	-9
Age	16-24	+28	-14
	25-34	+21	-6
	35-44	+10	-3
	45-54	+24	-19
	55-64	+16	-8
	65+	+14	-13

Source: Question HC4

Base: All adults aged 16+ (2,026), July – August 2014. All adults aged 16+ (2,260) October – December 2007

Q. Which would you most like to see? [A] or [B]?

5.6 Generations Analysis

Attitudes towards the future of PSB do not map neatly onto generations and were more related to attitudes and understanding of the marketplace. Broad summaries of each of the three groups are detailed below.

For example, generally the very youngest participants were more likely to think that the market would provide quality, but the quantitative research shows they are particularly concerned about reflecting diversity. Some of the youngest groups were also most concerned about loss of high quality news provision without PSB, and about the news being sensationalised if it was left to the market.

5.5.1 Tech natives (typically aged 16-30)

While they placed a great deal of value on the purposes and characteristics (in particular reflecting diversity and quality programming) they were less likely to think regulation is needed to ensure it is delivered. However, the exception to this was news. This group were very concerned about the standard of news dropping without regulation.

- They are the group most likely to want global content. They want representation for communities rather than the nations (England, Northern Ireland, Scotland, and Wales). Young people have become more demanding of variety than they were in 2007, but they are still the group most likely to want mass-audience programming on the PSB channels.
- Generally more likely to think that quality can be delivered by the market without the requirement for PSB, however they worry about news becoming sensationalised if it were left to the market
- More likely than older people to want the best content from around the world, as opposed to programmes that reflect life in the UK.
- More ambivalent than other groups about UK regions being represented, but they are the group most interested in different communities being represented.
- Younger people are more likely than older people to want mass-audience programming on the PSB channels.
- But more likely to want variety than they were in 2007.

5.5.2 Tech learners (typically aged 30-55)

Tech learners had mixed views on the need for regulation to safeguard the purposes and characteristics, with some thinking that Netflix and others will provide it since there is a market for content that fits the purposes and characteristics of PSB, while others were less sure. A majority of middle aged participants favour UK content over the best from around the world, but it is a much smaller majority than in 2007 when very few wanted content from abroad. They have also become bolder in their expectations from content demanding more experimental and original programming than they did seven years ago.

- Mixed views on regulation.
- Tended towards UK content rather than the best from around the world, however opinion is more divided among this group since 2007 when they were considerably more likely to favour UK content.
- This group are now much more likely to want original and experimental programming compared with 2007.

5.5.3 Traditionalists (typically aged 55+)

Like the tech learners, some *traditionalists* argued in favour of continued PSB to promote the purposes and characteristics while others were more relaxed about what might happen without regulation. Some in this group were particularly animated about seeing regions represented, with a handful of the older participants in the devolved regions particularly concerned about whether UK cultural diversity would be represented without PSB; however people from this group were less concerned about community representation.

- Clear preference for UK content over programmes that UK life
- A preference for representation at the sub-national level (England, Northern Ireland, Scotland, and Wales) over community representation
- Older traditionalists (65-74s) are the group most likely to want to see a range of programming on the main channels.
- Much less interested in original and innovative programming over ‘old favourites’ than younger and middle aged people.

6 Current delivery of PSB content

6 Current delivery of PSB content

This chapter looks at public perceptions of the different ways in which television content, specifically PSB content, is delivered. It first provides a broad overview of audience perceptions of the five main TV channels and the additional portfolio channels, on demand services, websites and smartphone apps they deliver. It then goes on to look at people's views towards the role of non PSB providers in delivering PSB type content.

Key findings

- People associate the 'main five' channels with high quality content, though many were surprised that ITV and Channel 5 have commitments to PSB.
- People use both PSB and non-PSB sources interchangeably and source PSB type content outside the main PSBs.
- People are regularly accessing non PSB news channels and online service providers in addition to the PSBs for their news consumption. Multi-sourcing news stories across a range of providers is considered to give a more balanced picture of events.
- People value content on the portfolio channels and do not see them as different to their main channel counterparts.
- As a result, the PSBs as a group are losing some of their distinctiveness, particularly among younger audiences, as the marketplace becomes more crowded.
- The BBC iPlayer, whilst being the most widely used catch up service, is found by some to be restrictive in terms of content availability. For many, in the non PSB on demand and online services including content aggregators, are easier to navigate with more relevant content. A core value of on demand services/content aggregators is the ability to binge entire series/box sets.
- Detailed generational analysis is explored in section 6.6.

6.1 Perceptions and use of the main five PSB channels

Despite an increasingly crowded marketplace many participants in the deliberative workshops spontaneously associated good, high quality programmes with four of the PSB channels (BBC One, BBC Two, ITV and Channel 4). Moreover, 'tech traditionalists' as well as some 'tech learners' continued to look at these as 'the main channels' and used them as a default viewing option because they had been around for a long time and were trusted to broadcast good quality programmes. This was the case with all PSB channels except Channel 5, which was less likely to be associated with quality content.

> *"My first port of call will be BBC 1, perhaps ITV… for the main channels its better because more people watch them as a reflex action. I like the brand recognition behind it…"*

Swansea, 18-34

"BBC, Channel 4 – their shows are just better than lots of other programmes on TV these days…"
Swansea, 55+

However, some participants (particularly younger participants) reported that when making viewing choices they were more driven by programmes than by providers. They reported that their decisions about what to watch was not typically based on behavioural loyalty to a particular broadcaster brand, and that they would source programmes they were interested in both on and off schedule.

6.1.1 Perceptions of BBC

Most participants in the workshops had high expectations of the BBC and trusted it to provide reliable, high quality content. Some associated the BBC's PSB requirements with the licence fee, having assumed that the organisation would have some restrictions and expectations placed on the content it provides as a result of being funding through public money.

The BBC's brand identity was more distinctive than the others; seen as a hallmark of quality and, to some, a part of the UK's national heritage. The BBC channels were valued by most participants for providing balanced and unbiased perspectives on important issues and many tended to associate the BBC with factual output and news content.

"It's an issue of trust too, others have sponsors but BBC is independent, more integrity and honesty with those channels compared with the Sky channels. Sky channels will show you want they want you to see."
Belfast, 35-54

Some participants were less positive about the BBC and even some who valued it felt that it was perhaps more "old-fashioned" than the other channels and its programmes were less likely to be cutting-edge. Some younger participants thought the BBC showed too many repeats; more than the other channels they were watching. A few participants were more extreme in their reservations and thought that the BBC provided 'dull' and 'stuffy' content. Their criticism was that it did not seem to have been created with people like themselves, (generally younger people) in mind. Other young showed a lack of reverence to the institution that was not generally observed amongst older participants.

"I don't think the BBC can change… it's dead tame. It's something that old people watch. It makes me think of news and old comedy programmes."
Glasgow, 18-34

However, young participants were not unanimously critical of the BBC. Indeed some of the youngest participants (16 and 17 year olds) were the biggest advocates of the BBC.

Likewise, some older people felt that the BBC's reputation stems from a previous golden age, but that it may be 'dumbing down' now.

"My perception of BBC 1 is that it's better quality programmes. But I'm not sure it's true."
Bristol, 55+

6.1.2 Perceptions of Channel 4

Channel 4 was also associated with high quality content. Those who were Channel 4 viewers believed that it was characterised by its slightly quirky or niche approach to issues and presentation. For example, the Channel 4 News was favoured by some over BBC News because it was more likely to explore an interesting storyline or a certain aspect of a news piece.

There was a perception that Channel 4 showed a wider range of programmes than other PSB providers and was good at broadcasting content that met all PSB purposes, in particular diversity through its documentaries which show "things you wouldn't hear about otherwise" according to one of the 17 year olds in Brighton. Some thought that, compared with the BBC, Channel 4 showed fewer repeats.

Others felt that Channel 4's comedy offering is better than that of the BBC. Though some felt it was overly dominated by American comedy, while their British comedy airs on the portfolio channels.

A small number of middle-aged participants felt that some content on Channel 4 can be low quality.

> *"Some Channel 4 stuff is a bit tacky"*
> Belfast, 34-54

6.1.3 Perceptions of ITV

Many participants were surprised to learn that ITV was a PSB channel. They understood that it was a commercial channel and were uncertain whether this could be at odds with their public service commitments. However, when discussing the PSB purposes and characteristics a large number of the examples participants gave for content that they felt achieved the PSB purposes were in fact ITV programmes.

Participants who were keen followers of the news and thus liked to watch news content from various sources tended to see value in provision on a variety of channels; they felt that ITV provided a different viewpoint to Channel 4 and the BBC.

Overall, opinions on ITV were more polarised than of the other channels. Some participants disliked the commercial feel, both for the adverts and the perceived slightly more sensationalist approach that it takes to coverage of serious issues. Some who held this view felt that the channel has improved over the last few years, especially around its drama offer.

> *"It's low-brow with the odd peak, there's sometimes a good drama on at 9pm."*
> Bristol, 55+

6.1.4 Perceptions of Channel 5

Many participants were surprised to learn that Channel 5 was a PSB broadcaster and that it had any obligations imposed on it. Many thought it tended to broadcast poorer quality programmes that have a ‘cheap’ look and feel, including the news.

> *“I’m surprised Channel 5 is a PSB provider; from what I gather it doesn’t have anything of cultural value; American crime series; bad films you wouldn’t miss that.”*
> London, 24 - 28

Some participants took an alternative view and argued that Big Brother was an example of engaging content that reflected real-life issues and discussions that people have. As such these people enjoyed watching Channel 5 and felt that it catered for them better than the other PSBs.

> *“It’s come a long way from when it first started. I watch Celebrity Big Brother and there’s been a couple of documentaries… They’ve got some films in the afternoon… I like the wright stuff rather than Jeremy Kyle.”*
> London, 28-35

6.2 Perceptions of PSB portfolio channels

Most participants in the deliberative workshops did not make a natural distinction between the five main PSB channels (BBC One, BBC Two, ITV, Channel 4 and Channel 5) and the rest of the services these providers offer. In particular, participants did not separate the purpose of the PSB’s *main* channels from their wider portfolio of channels (such as Five USA of ITV2) and services (such as 4OD or iPlayer). Moreover, when participants were presented with the concept of PSB, many assumed that the PSB guidelines related to everything provided by the PSB broadcaster and did not understand why there should be a regulatory distinction between the five main channels and their other services.

> *“I think their [portfolio channels] do provide PSB content - often it’s the same shows but they’re just bringing them to a different audience.”*
> Glasgow, 18-34

However in practice, participants did make a distinction between the ‘main’ channels and the portfolio offerings when describing their consumption habits. This tended to have an age dimension; with some of the oldest participants adamant that they never watch portfolio channels, while some of the youngest participants said they never, or hardly ever, watch the five main channels. This can also be seen in the quantitative findings outlined in Table 6.1.

> *"Personally, I don’t go away from the core ones. And I don’t really watch channel 5."*
> Bristol, 55+

> *"I think the additional ones are better than the original ones to be honest."*
> Manchester, 16-17

Some participants particularly valued the portfolio channels because they catered to more niche-audience tastes, for example BBC Four focusing on factual programmes, Film4 specialising in films, or Five USA focusing on content from the USA.

> *"Largely I think most of the [non-PSB] channels have their niche, so you can really understand their brand identity. For instance look at Five USA it is obvious …The traditional ones, they tend or pretend to be, generic."*
> Glasgow, 25-54

Some participants associated the portfolio channels with re-runs of old PSB content. The use of re-runs split opinion. For some, this was a positive characteristic as they enjoyed the opportunity to see their old favourites again – some of the older participants actually preferred these re-runs to 'new' content as they felt it was more relevant to them and their interests or sense of humour. In contrast, some participants were more critical of the perceived number of repeats on portfolio channels, which they felt provided them with little new content to engage with.

The use of PSB portfolio channels varies by genre. As explored in the quantitative research (shown in Table 4.2 above):

- Two-thirds (65%) of those who watch children's programmes that reflect life in the UK choose to do so using BBC portfolio channels, compared with 40% who use any of the main five channels, and a quarter (24%) who use any of ITV, Channel 4 or Channel 5 portfolio channels. Middle aged people aged 35-44 are the group most likely to watch this content on non PSB or portfolio channels.

- In contrast, PSB portfolio channels not provided by the BBC are most likely to be used by those viewing comedy and sitcoms, films, and drama that reflect life in the UK.

6.2.1 BBC portfolio channels

The BBC portfolio channels – BBC Three and BBC Four – were associated with high quality content and were seen by some as being more innovative and daring in their programming, compared with BBC One and BBC Two. Many thought they were often used as a testing ground for BBC One and BBC Two content.

Some younger participants associated BBC Three with comedy and thought these programmes were targeted at younger audiences than BBC One and Two. For the youngest participants (16-17), BBC Three was by far the most talked about of any BBC channel. Some of these teenagers claimed to hardly ever watch content on the primary BBC channels, only tuning in to BBC One 'when Dr Who starts', or 'at Christmas'.

BBC Four was mentioned less frequently by participants, though a small number of generally older participants use the channel.

6.2.2 Channel 4’s portfolio channels

Channel 4’s portfolio channels – including E4 and Film4 – were predominantly popular among younger and middle aged participants, but also some older participants who watch comedy on E4.

> *“Our teenagers they like that [Big Band on E4]but I hate it!”*
> Bristol, 55+

Some viewers also valued Film4, as a ‘go to’ channel for high quality films. However, others were frustrated by adverts interrupting films on this channel. For some Film4 was also a strong cultural brand, which they associated with supporting quality British filmmaking.

> *“I do like Film4 productions though, they’re quite representative of the UK and our culture, films like ‘This Is England’.”*
> Glasgow, 18-34

Some Film4 viewers felt that the main PSB channels also showed good films but to watch them required more preliminary research, consulting the listings to see what was on, and when, as there was not a specific slot when films would be shown.

> *“I watch Film4 the whole time, it’s brilliant, there’s always a brilliant film on. Sometimes Channel4 and BBC have good films but they are less consistent. You know what you are getting [with E4 and Film4]. With BBC One and Two, unless you know religiously what is on, you need to go to the TV listings, whereas with the others you know what sort of thing will be on.”*
> London,16-24

6.2.3 ITV’s portfolio channels

For participants in the qualitative workshops, ITV2, ITV3 and ITV4 had strong associations with entertainment programming, including The Only Way is Essex, Britain’s Got Talent and X-factor after-shows. Even amongst some fans of those programmes, the additional content associated with talent shows is seen as over the top. For participants who are not fans of this content, the output is seen as low-quality programming.

> *“ITV2 is good for things like Britain’s Got Talent and X Factor after programmes but then how much more information do you need on something that you’ve just watched?”*
> Glasgow, 18-34

In addition to entertainment content, ITV4 is valued by a small minority for its Europa League content. As outlined earlier, some also valued the re-runs of old series shown on ITV2, ITV3 and ITV4 such as Midsomer Murders and Heartbeat which they felt were vintage shows which they enjoyed watching again.

6.2.4 Channel 5's portfolio channels

Channel 5's portfolio was the least well known of the four, and the majority of comments were from people who did not know much about what the portfolio offers. A small number knew of 5USA and others used, or had family members that used 5* for soaps or other entertainment content.

> *"I've never even heard of 5*, so it can't be that useful"*
> Glasgow 18-34

As a result, few expressed strong views about these channels.

6.3 Use and perceptions of PSB catch up and on demand services

Awareness of PSBs' catch-up and on demand services among participants at the deliberative workshops was high. Indeed, many participants were using them regularly to catch-up with programmes they had missed on scheduled TV or as their first port of call.

Where they had access, older participants (tech learners) tended to see on demand services as providing them with an extra means of catching-up or accessing reruns of their favourite PSB series. In contrast, younger, 'tech-native' participants were more likely to go to on demand services first. For some, this was often their only way of watching broadcast content, though they still often referred to this behaviour as 'catch-up' rather than watching on demand.

> *"I don't get to watch my usual things if I've been on a block of night shifts [but] I can catch up on what I've missed."*
> Bristol, 55+

> *"I like to watch TV but I don't have a TV in my room as student, so tend to watch catch up on my laptop."*
> Glasgow, 18-34

Findings from the quantitative research presented in Table 6.1 below suggest that across age groups, online and on demand services provided by PSB providers are most likely to be used for comedy and sitcoms and films that reflect life in the UK, drama and entertainment. In line with other findings, older groups are less likely to use on demand, but where they do it tends to be for these genres. However, other demand services are more popular than the PSB on demand services for those viewing films, with the exception of those aged 65+, and for children's programmes that reflect life in the UK.

Table 6.1 – Use of online and on demand services by genre

	Base size (all who watch this content)	Online	
		iPlayer, 4oD, ITV Player, Demand Five (%)	Other on-demand services (%)
Comedy and sitcoms that reflect life in the UK	*1161*	22	18
Films that reflect life in the UK	*873*	19	26
Drama that reflects life in the UK	*1111*	18	13
UK Entertainment and contemporary music	*645*	18	14
Other factual programmes	*1029*	14	11
History, nature or science programmes	*1142*	13	10
Educational programmes	*553*	12	8
Arts and classical music	*477*	12	5
Programmes that reflect the lives of different communities/cultures in the UK	*469*	11	8
UK Sport	*855*	10	13
Soaps that reflect life in the UK	*677*	10	9
Children's programmes that reflect life in the UK	*349*	10	17
Current affairs programmes	*841*	9	4
Religious programmes	*191*	9	5
News	*1437*	7	3
Other programmes about and made for people in my nation/region	*523*	6	5
Current affairs about and made for people in my nation/region	*492*	6	3
News about and made for people in my nation/region	*822*	4	1

Source: Question CPP2b
Base: All who watch this content (figures in table). UK adults aged 16+, July – August 2014
Q. Which channels or media services do you use to watch this type of programme at least once a month more

The remainder of this section reviews the perceptions of on demand service offered by PSB providers

6.3.1 BBC iPlayer

Most participants were aware of the BBC iPlayer; among older participants with less experience of on demand services, BBC iPlayer was the main service that they knew of or were likely to be using. Some with very limited awareness of the on demand world thought that BBC iPlayer was the sole catch-up service. For example, one participant recounted problems where they had tried to find a certain programme on iPlayer, but they later discovered was not available because it was not produced by the BBC.

Users of BBC iPlayer in the deliberative workshops commented that it was good for catching-up on recent broadcasts but often had limited availability of programmes that dated back a few months. Some also thought that programmes have a short 'shelf life' on the iPlayer and were sometimes only accessible for one week after being broadcast, which they did not think was not long enough to provide them with the choice and ease of access they wanted. Consequently some viewers, in particular younger audiences, sought out BBC content elsewhere on the internet as they knew that they could access it through YouTube or another service after it had been removed from iPlayer.

> *"Sometimes things get taken off iPlayer after a week or something, which can be annoying. Channel 4 does it for a month and I think ITV do the same."*
> Glasgow 18-34

> *"Yeah, that can be annoying, it needs to be on there for longer."*
> Glasgow 18-34

6.3.2 4oD and ITV player

4oD and ITV player were also popular among users of on demand services. However, some participants voiced concern that they were asked to provide personal details such as an email address before being granted access to 4oD, even though this is no longer the case. Older and often less tech savvy participants with limited experience of using online services of any kind were particularly uncomfortable sharing personal information and said that it had put them off using the 4oD service.

Another concern with 4oD and ITV Player was that viewers had to sit through numerous adverts which they felt defeated some of the value of an on demand service.

> *"The adverts on 4 are pointless; you go on to watch 'on demand', not to watch adverts!"*
> Manchester, 16-17

For this reason, participants often preferred to create their own catch-up facility, recording Channel 4 and ITV programmes on scheduled TV and fast-forwarding through the adverts. Some were doing this minutes after the programme was broadcast on scheduled TV purely in order to avoid watching adverts.

6.3.3 Demand 5

Interest in, and knowledge of Demand 5 was more limited than the other PSB on demand services. This is linked to the fact fewer participants said they were watching Channel 5.

The findings from the quantitative survey reflect this limited usage of Channel 5's on demand service, with just over one in ten users of on demand services reporting to use Demand 5 (13%) at least once a month.

6.4 PSB websites and web apps

In addition to portfolio channels and on demand services, providers of PSB have also developed websites and smartphone apps to support and enhance engagement with television content.

Among participants from the deliberative workshops, BBC websites were by far the most commonly used of all the PSB websites and many said they were accessing it daily; seeing it as equivalent to a national newspaper website. The BBC was valued for bringing audiences high quality content that was free to access which some felt made it better than the newspaper websites. The BBC's websites and web apps - BBC News and BBC Sport - tended to be accessed while people were on-the-go and wanting to follow the latest on a particular news story or get live results of a sporting event.

> *"On the BBC website I go straight to BBC sports and watch things like little clips of managers speaking and commenting….Also good for highlights."*
> London, 16-24

> *"I use the STV website every so often, as BBC doesn't feature local news. Sometimes it treats the whole of Scotland as a region, rather than a normal place."*
> Glasgow, 18-34

This is supported by the findings from the quantitative research (shown in Table 6.2) which show that 'finding out about news in the UK and abroad' is the most common reason for visiting PSB provider websites. A fifth (21%) of people cite using websites provided by the BBC, ITV, Channel 4 or Channel 5 for these purposes.

Table 6.2 – Where people access content relating to different pastimes and activities.

	Scheduled TV or TV you have recorded yourself	On demand / catch up TV services (%)	Websites provided by the BBC, ITV, Channel 4 or Channel 5 (%)
Relaxing and entertainment	71	19	9
Finding out news about what is happening around the UK	67	4	21
Finding out what is happening around the world	67	4	21
Knowledge about topics such as arts, science, nature or history	52	9	14
Finding out news about what's happening in your region or locally	51	2	13
Finding out news about what is happening in sports	45	4	15
Finding out about people with values and lifestyles that are different to your own	37	4	8
Finding out about different communities and cultural interests in the UK	38	4	12
Your personal interest and pastimes	42	9	12
Discovering new things	40	7	12
Finding out about people with similar interests to your own	20	2	6

Source: Question CPP1

Base: All respondents (2,026). UK adults aged 16+, July – August 2014

Q. Which of these you would use as a source for each of the following activities and pastimes

Participants in the qualitative research were generally less familiar with websites of other PSB providers. An exception to this was found in Glasgow where some participants were using the STV website, which they valued for its coverage of Scottish news and current affairs. Scottish participants found this particularly valuable for information about the independence referendum debate.

Younger participants saw additional value in the type of news provision that a website or web app provided; they liked the fact it gave them access to bite-sized pieces of content for example a short clip of a football manager speaking about a recent match, or show reels of sporting highlights. Others appreciated live feeds that they accessed through web apps when they are on the move.

6.5 Non PSB brands and services providing PSB-type content

While many participants access PSB main channels and PSB wider portfolio of services for PSB content, it was also clear in the deliberative workshops that many also find this type of content elsewhere. For younger participants and tech natives, the use of these alternative providers for all types of content, including PSB-type content, is now the norm. Equally, many middle aged and older participants were also reaching out to alternative providers for PSB-type content. According to many participants, the line between the PSB main channels and the huge array of other options was starting to blur.

Given that some people's focus is typically on finding a programme they are interested in (explored further in chapter 4), rather than the channel or provider responsible for that programme, many are not loyal to one provider but will use multiple scheduled and on demand sources to find what they are after.

Many younger and older participants who enjoy watching comedy preferred to watch *non*-PSB channels such as Dave or Comedy Central and thought these provided better content than the PSBs. Some of the popular comedy shows that participants watched on Dave were in fact previous BBC productions but participants were often not aware of this. This is also true of BBC history and nature programmes being repeated on non-PSB channels.

Many participants who were regularly accessing news content via PSB news channels and online services said they also searched more widely among non-PSB providers for alternative sources of news. Many turned to international news channels such as Al Jazeera, Russia Today and France 24 as a way of keeping themselves well-informed, usually in addition to the PSB output. Some also used online sources of content. They believed that consuming news content from across a range of sources allowed them to get a more balanced picture of events than they would otherwise have if they restricted themselves to just the PSBs.

> *"I watch Russia Today and Al Jazeera to try and get different viewpoints."*
> Newcastle, 35-44

> *"I prefer Vice, it's a lot less biased. They're not paid a salary. BBC journalists get paid, they say whatever cos [they get] paid.*"
> Belfast, 18-34

In general, participants were comfortable with using alternative news services and felt that it was inevitable that no single channel could offer a complete account of events. A few were harsher in their opinion of the BBC, criticising it for biased reporting and under-representing certain viewpoints.

Increased channel choice and more news-only channels has raised audience expectations of what access to 'alternative viewpoints' now means. But it has also changed viewing behaviours with many individuals now happy curating their own viewing collections and looking beyond the PSBs to satisfy their needs. As such, many participants did not require more from the PSBs in terms of news provision but they did want to ensure plurality of news channels both with PSB and beyond.

5.4 Perceptions of non-PSB on demand services

For the more experienced on demand service users, often tech natives, the non-PSB online and on demand services were often seen to offer a more user friendly consumer experience compared with the PSB providers. Users found it easy to navigate on demand services like Netflix and YouTube and had little trouble finding the content they were after.

> *"I tend to watch a lot more TV through my Xbox these days, so I can easily flick straight to Netflix."*
> Glasgow, 18-34

Another perceived advantage of alternative on demand services is the personalised nature of the service that users receive; they appreciate relevant recommendations and easy access to content that is more likely to suit viewers' individual tastes. For example, some participants mentioned that YouTube recommends more content at the end of watching a video, which made it easier to find additional content that would be similar.

Key to the value that participants saw in the wider offering of on demand services was the potential that it opened up to them for bingeing on their favourite programmes. Many younger participants described how they spent hours watching back-to-back episodes of a series they enjoyed. Often they were doing this using non-PSB on demand services as these were seen to offer a better choice of programmes, including their favourite programmes from overseas (in particular the US). As noted in chapter 3, those from younger age groups were the most likely to use commercial services such as Netflix and YouTube.

> *"If you watch on TV you have to wait, online you can binge it all in a day."*
> Manchester, 16-17

6.6 Generations analysis

6.6.1 Tech natives (typically aged 16-30)

Despite regularly talking about programmes rather than providers, tech natives and young people continue to have strong brand associations with the PSB channels. The BBC is seen as a bastion of high quality by some, and by others as a provider of old fashioned content that was 'not for them'. The exception to that is BBC Three which is widely popular with this group. On the other hand, Channel 4 is associated with content that showcases diversity. PSB on demand services are seen by some in this group as frustrating (because of adverts on 40D and ITV Player and because of the lack of a programme archive on iPlayer), especially in comparison with providers like Netflix.

- The BBC is highly valued by many in this group; however others found it 'old fashioned'.
- BBC Three has a strong brand with most young people, in particular its association with comedy
- Channel 4 valued for its diversity; while E4 and Film4 are also popular
- For some tech natives, on demand services are sometimes the only way of watching content, particularly if they do not have a TV of their own

- Some find PSB online services frustrating and opt instead to find ‘workarounds’ – for example to access BBC content that had expired on iPlayer
- STV website was popular amongst young participants in Scotland

6.6.2 Tech learners (typically aged 30-55)

Tech learners and those in this age category were more likely than younger people and older people to watch PSB-type content on non PSB or portfolio channels, some of this includes repeats of content that was originally aired on PSB channels. BBC Four was highlighted by older tech learners for its niche music documentaries. A handful in this group felt that Channel 4 has a tendency towards low quality output, while others spoke more positively about the contribution of that Channel through its Film4 to British filmmaking.

- Tech learners are the group most likely to watch PSB-type content on non-PSB or portfolio channels (some of it old PSB).
- Some felt Channel 4 was low quality though E4 and Film4 were both popular; the latter strongly associated with grassroots British filmmaking
- BBC Four was valued by a handful of older tech learners

6.6.3 Traditionalists (typically aged 55+)

The BBC brand remains strong with this group who, like some of the tech natives, associated it with high quality content. However, some were concerned that this reputation had become out of date and that the quality of programmes in recent years had dipped. ITV’s reputation appears to be enjoying an inverse of this with older people pleasantly surprised by the quality of some of the channel’s output, in particular the quality of ITV drama. iPlayer is the best known and most widely used catch-up or on demand service amongst this group, with some finding the requirement to input personal data on the 4oD sight off-putting.

- BBC well respected for quality amongst this group, though a handful worried it had dumbed down in recent years.
- Mixed views on ITV with some feeling that it is improving, especially around drama.
- Some thought iPlayer is the main catch-up / on demand service (some thought it was the only catch-up provider available).
- Some traditionalists found being asked for their email address deterred them from using 4oD, while others had no desire to use on demand or catch up services

7 Future delivery of PSB content

7 Future delivery of PSB content

As outlined in chapter 3, the way in which people consume television content has changed. The future of PSB requires a detailed understanding of why and how people engage with new ways of watching content currently, and preferences for how people would like content to be delivered in the future. This chapter first assesses whether people would prefer to engage with scheduled or on demand television content in the future. It also explores appetite for use of enhanced content such as websites and apps, as well as other innovations such as high definition channels and online children's services.

Key findings

- On demand services are considered to be important, and people expect these to be available on different types of devices.
- However, most people resist a shift to on demand only PSB provision, even heavy users of on demand services are concerned about the impact on access for others in society, especially for those members of society who might struggle to pay for services or use the technology.
- Television continues to provide an important societal role. Certain content deemed most valuable to society (e.g. news and factual/informative/educational content), along with the shared experience/watching content as a nation that television enables, is considered too important to become non broadcast.
- Enhanced features (such as websites and smartphone apps) are not widely used, and are perceived to be less of a priority than delivering high quality content.
- Parents and those with children regularly visiting feel that it is important to have plurality in the provision of children's content, although there is a lack of consensus as to whether on demand services and online services offer a better way of providing children's content compared to TV channels.
- Though younger age groups are the most likely to prefer a world in which there was only on demand content, many – particularly after deliberation – are hesitant about PSB being online only as they are concerned about the impact on society. Further generational analysis is explored in section 7.4.

7.1 Preference for on demand or scheduled content

7.1.1 Views of the need for a schedule

During the deliberative workshops, attitudes towards the importance of linear television were shaped by existing consumption behaviours and attitudes to technology; for example how accustomed people are to watching scheduled TV, or how comfortable they were accessing on-demand services or using mobile devices.

Figure 7.1 – Continuum of attitudes to on demand services

Some **feel controlled by the TV schedule**, restricted by having to watch content at a predetermined time that they have no control over (except via playback) – they **prefer to see themselves in control of the content** they watch, deciding when to watch it, for how long, how much, where, on what device.	Some think **on-demand can mean consuming less content** as they aren't tempted just to watch whatever is on or be tempted to watch a programme straight after another one just because it is on.	Some **like the structure that scheduled TV brings**; it allows them to plan days/evenings around programmes and make a personal 'event' that they look forward to. Older people who may live alone can find this particularly comforting.	Some (all ages), see **on-demand taking away some of their ability to limit what they watch.** By offering endless options for engaging with content it locks viewers into watching more than they would choose to.

Source: Ofcom 2014 PSB Review

For some participants – most notably younger 'tech natives' – the use of on demand services was an important part of their day to day experience of consuming content. These participants took on demand and catch up services for granted and did not perceive them to be an 'added extra' for PSB providers. Alongside convenience, these participants also took choice in viewing selection for granted; they no longer expected to be constrained by a television schedule.

Other participants – most notably the 'traditionalists' – enjoyed the structure that scheduled television provided for 'foreground' or 'background' viewing. For example, when using scheduled content for background content some used the morning schedule to know when they were running late for work, and others said that they knew it was time to go to bed when the ten o'clock news came on. When using the schedule for foreground content people liked the predictability and being able to plan their day around the given structure.

> *"It gives you more choice when you can see that its scheduled and you can plan and fit it into your routine"*
> Belfast, 35-54

Parents and younger participants with infant siblings also mentioned the children's TV schedule as important tools for young children.

> *"Children's TV is important, In The Night Garden was on at 6pm, it's a relaxing baby TV show, he would know it's time for bed. He would settle down and have his tea."*
> Manchester, 16-17

Traditionalists were also concerned that the nature of on demand services – where users can view their favourite programmes at any time of the day or night – could be too 'tempting' and could lead to an 'unhealthy' amount of viewing, otherwise known as 'binge viewing'. For example, being tempted to watch numerous episodes of a favourite series at once even if the original intention was to watch just one.

Many of those who preferred linear television used personal recorders (PVRs or DVRs) to catch up on scheduled content they knew they would miss. Some older participants also commented that they found 'plus one' channels really useful because they could help them resolve any ‘schedule clash’. For these participants, although there were conducting a limited amount of time-shifting behaviour, their choice of content was still based on the listed schedule.

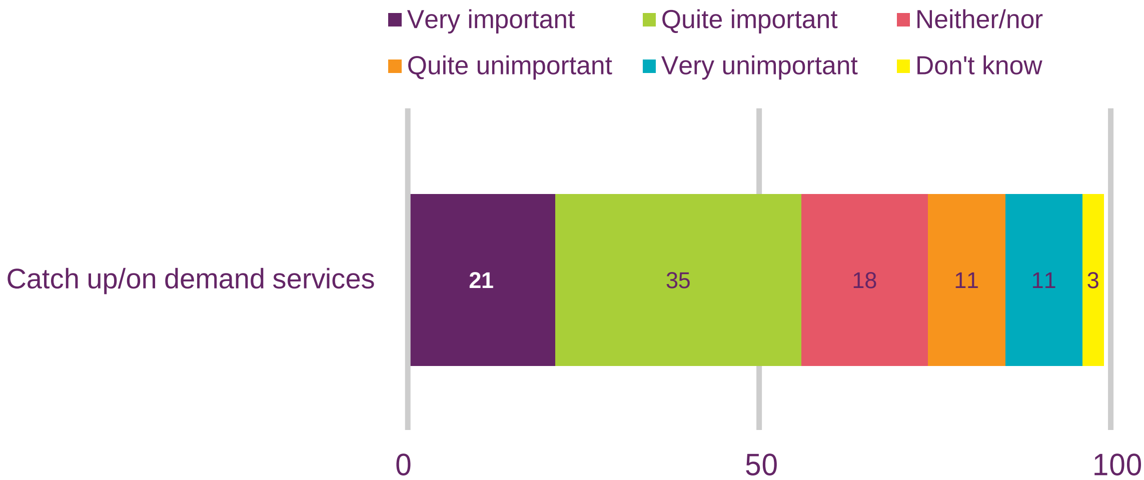
There was broad consensus among participants that scheduled television was better suited to some genres of television content. In particular, cultural or sporting events, news or ‘live’ entertainment programmes (such as X Factor), were considered best to watch ‘live’ and therefore they would typically watch these as they are broadcast if possible. This content was seen as “in the moment”; for which sharing the experience of watching was part of the appeal.

7.1.2 Perceived importance of on demand services

The quantitative study explored the importance of a number of recent innovations in content provision. More than half (56%) perceived the provision of on demand or catch up services by the PSB providers to be important, including around a fifth (21%) who believe these services to be *very important*.

The perceived importance of on demand services is considerably higher among users, three-quarters of whom (74%) feel the services are very/quite important compared with just over a quarter (27%) of non-users, and the proportion who say it is ‘very’ important rises with frequency of use (45% of heavy users say it is very important). Moreover, those groups who are more likely to use on demand services are also more likely to believe the services are important. For example three quarters (76%) of 16-24 year olds find catch-up/on demand services to be an important innovation compared with two in five (40%) of those aged 55+. Equally just under two-thirds (63%) of those from ABC1 socio-economic groups feel these services are important compared with less than half (47%) of those from C2DE socio-economic groups.

Figure7.2 – Importance of provision of catch up/on demand services



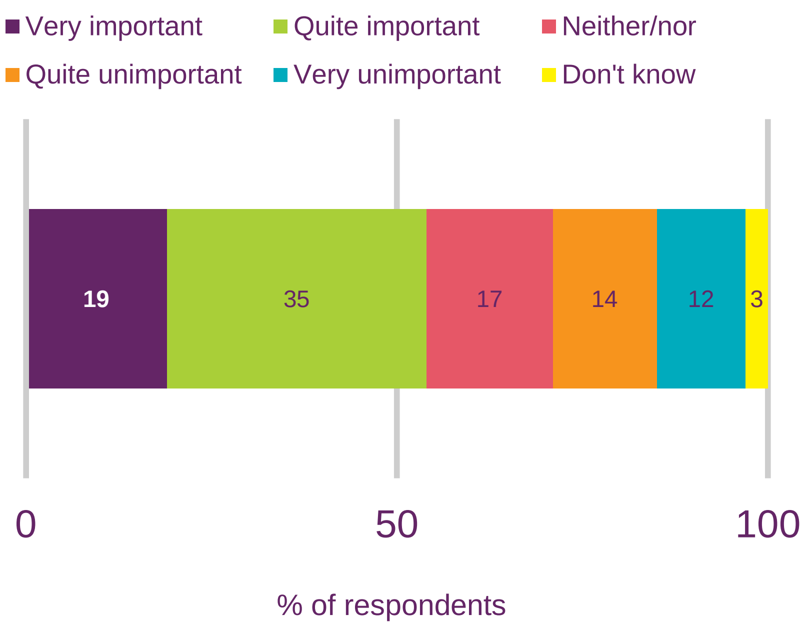
Source: Question GV6. Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: How important, if at all, is it to you personally that each of the following types of service are provided?

As shown in figure 7.3 below, over half (54%) of people also say it is important that online and on demand services are widely available on different devices other than TV (e.g. Smartphones, tablets and laptops).

Those most likely to think accessibility on a range of devices is important are similar to the groups who believe on demand services are important at all i.e .younger people, those from higher socio-economic groups, and users of these services.

Figure7.3 – Importance of catch up/on demand services, on devices other than TV



Source: Question GV6.
Base: All respondents (2,026) Interviews with 2,026 UK adults aged 16+, July – Aug 2014
Q: Thinking about how you can use catch up/on demand and website services, how important is it to you that these different services are widely available on different devices, other than TV?

7.1.3 Views of providing PSB on demand only

The research explored how the public would feel if PSB content was only delivered through online or on demand services.

The distinction between PSB and non-PSB content in this context was particularly difficult for participants to grasp. Given the increase in number of PSB portfolio channels, the introduction of on demand services from PSB providers, and the number of other providers of PSB-type content, many participants struggled to visualise a world in which the accessibility of PSB content would be different from the accessibility of non-PSB content.

People's immediate reactions to the idea of providing PSB on demand only were the same as their view of moving all content services on demand. Those who were already heavily using the services were less concerned personally but were concerned for society as a whole.

Those using the services less frequently or not at all had concerns from both a personal and societal perspective.

Although opinion was mixed, most participants of all ages in the deliberative workshops expressed a number of concerns about moving to a fully on demand world in which there would be no scheduled PSB television content. Participants thought carefully about the implications not just for themselves and their own viewing preferences, but also the implications for other groups within society, which explained why, regardless of age or familiarity with technology, most were concerned about the idea from a societal perspective.

A key consideration was access to on demand services. Some participants were concerned about how much more difficult it would be, either for themselves or for others, to have to access content through the internet or on demand players. This point extended beyond having an internet connection. Some traditionalists who had internet connections and suitable devices at home could still not imagine wanting or needing to use on demand, as they preferred the perceived convenience of a schedule and ‘’just turning on the TV’.

> *“My Gran wouldn’t know what to do. She likes her routine of Corrie, EastEnders then Corrie again. She wouldn’t faff around with catch up services.”*
> Glasgow, 18-34

> *“We would miss the convenience of switching on TV instead of having to go online and choose what to watch.”*
> Bristol, 55+

> *“My mum will only ever watch anything on TV. I tried teaching her how to use the internet functions on her smart TV but she didn’t have a Scooby. She has an iPhone but it’s wasted on her. She’s 55.”*
> London, 16-24

Tech-savvy participants of a range of ages were also concerned that content would be interrupted or temporarily unavailable due to connection problems (both lack of signal or poor quality of connection). This view was shared by some younger ‘tech natives’, who had experienced connection problems whilst watching television online, both in London and in more rural areas. There was a perception that internet connections were less reliable than the broadcast television signal. The perceived potential for a less reliable service had some impact on both personal preferences and views on what would be best for society as a whole.

> *“If you have an issue with Wi-Fi you’re screwed!”*
> Brighton, 16-17

In contrast, a handful of participants, including some tech natives and tech learners, felt that PSB going on-demand would be a straight-forward transition for them personally. They felt in one sense that it would provide the added benefit to all of society of being able to watch all content at a time that is convenient.

> *“I just don’t see what difference it’ll make. Say everyone has a box that has on demand features. All you do – is go to BBC3 and it goes through the internet.”*

London, 28-35

"With regards to society…people wouldn't fit their lives around a tv schedule. They can access stuff online whatever time they want."
Swansea, 18-34

Parents in the deliberative workshops also spoke about the advantages of being able to watch the content they want to watch, rather than having to watch what their children or other family members want to watch.

"[Without any on-demand content]I wouldn't get to see anything that I like, everybody else would be too busy commandeering the television."
Glasgow, 18-34

As outlined above, many of these predominantly younger or middle aged tech-natives still expressed concerns about older, vulnerable and poorer viewers who might lose their access to PSB content because they did not have internet access, or appropriate hardware to benefit from a fully on-demand world. Participants were particularly worried for members of the public who might have limited mobility or not be able to leave their home, thus losing the ability to use PSB television as a way of connecting to the outside world.

"I was being selfish but what about the older people?...It would work better for me but not for everyone."
Newcastle, 35-54

"Lots of kids at school don't have enough money to have the internet."
London, 28-35

"Depends on age group; younger people would seek it out and older people would miss out."
Belfast, 25-54

Respondents in the deliberative workshops also talked about the wider societal value of broadcast television. As discussed at greater length in Chapter 4.1, the quantitative research shows that three quarters (74%) of people agree with the statement that 'as well as entertaining and informing people, television has an important social role to play'. One example participants in the qualitative gave was the role broadcast television plays in directing viewers to certain types of content that they might not otherwise watch. Participants felt this was most relevant to factual and informative television content which some people might not seek out if they were choosing what to watch by programme; instead they could be prompted by a schedule, or stumble across interesting content while channel flicking.

"I suppose that is going to change the viewing tough. When I'm waiting for a channel to come on, I actually watch the news. Once you're actually watching something you take interest."
Swansea, 18-34

Others were concerned about losing the value associated with watching common content 'as a nation'.

> *“I think that as a society, those terrestrial channels bond us as a country. You know everyone has it. You know you might not be watching the same things, but we’re kind of taking it for granted that you’re all tighter. I think if you took that away – we might not be as bonded.”*
> London, 28-35

As discussed above, there are some types of programming which people are particularly resistant to losing from the schedule. This was partly because of the perceived value of the shared experience created by these programmes, but it was also driven by the perceived societal and cultural value of these shows. Within the deliberative workshops there was a sense that the content deemed to be most valuable to society should continue to be on schedule. Though this was not defined further in the workshops, the quantitative study reveals that when people are asked to rank types of content in terms of importance for society, news was seen as the most important (see Chapter 4.4).

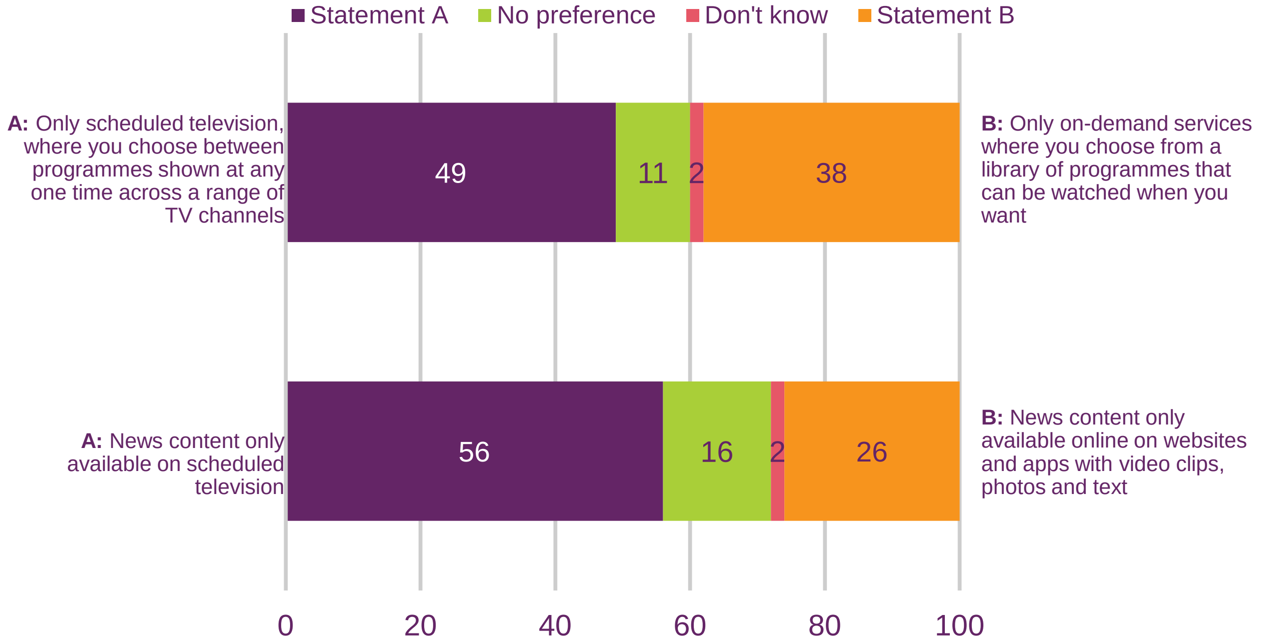
> *“The possibilities for social interaction, in terms of learning together. You’d throw that out the window [if you selected only on demand] because at work everyone is oh my god did you see EastEnders last night but if everyone has watched it at different times or even on a different day it wouldn’t work.”*
> Bristol, 55-64

In the quantitative research, people were asked to make a ‘hard choice’ between a landscape where *only scheduled* television was available, and one where *only on demand* television was available. Overall, half (49%) of people would prefer scheduled television, compared with 38% who would choose to view television only through on demand services; one in ten had no preference (11%).

Among those who ever use on demand services, three in five (39%) would still prefer ‘only scheduled’ television; and within this group around a third (31%) of ‘heavy’ on demand users would still prefer an ‘only scheduled’ landscape if forced to choose.

An overall preference for ‘only scheduled’ content is more apparent when thinking specifically about news content. Under this scenario, 56% of people would prefer ‘only scheduled’ content; more people have no preference (16%) and only a quarter (26%) would prefer news content to only be available on websites and apps.

Figure 7.4 – Preferences for on demand or scheduled content

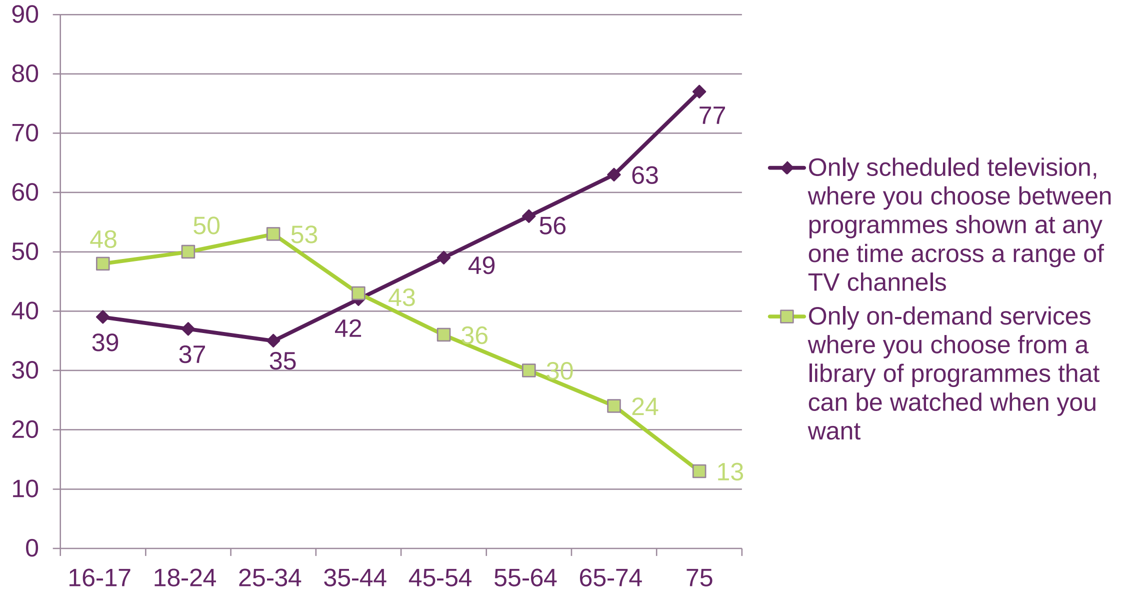


Source: Questions HCP2, HCP4. Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: What would you most like to see? [A] or [B]?

As demonstrated in Figures 7.5 and 7.6, preference for scheduled or on demand content is correlated closely with age. Half of those aged 16-24 (50%) would prefer on demand only provision over scheduled only, rising to 53% among those aged 25-34. People aged 35-44 are split evenly (42% scheduled compared with 43% on demand), compared with more than three quarters of those aged 75+ (77%) who would prefer 'only scheduled' content.

Figure 7.5 – Preferences for on demand or scheduled content: by age

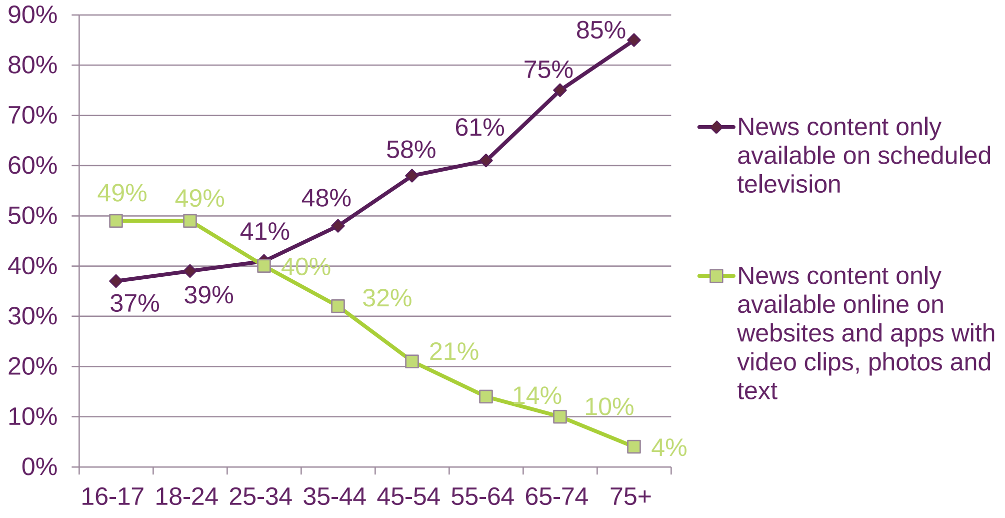


Source: Question HCP2.
Base: All respondents (2,026) Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: What would you most like to see?

In figure 7.6, preference for scheduled news content is apparent at a lower age range than preference for scheduled content overall. Those aged 25-34 are evenly split on preference for news content, but there is a clear majority of opinion (48% to 32%) among those aged 35-44.

Figure 7.6 – Preferences for on demand or scheduled news content: by age



Source: Question HCP4.
Base: All respondents (2,026) Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: What would you most like to see?

A preference for on demand content is also more prevalent among those with children (47%); in contrast, a preference for scheduled television is more apparent among those living in rural areas (57% compared with 48% urban), and those from high deprivation areas (53% compared with 46% in 'low' deprivation areas).

Unsurprisingly, those who have never accessed the internet are more likely to prefer 'scheduled only' content (74% compared with 49% overall). Heavy users of the internet are evenly split, 43% would prefer only on demand, 43% would prefer schedule only.

7.2 Views of alternative PSB formats

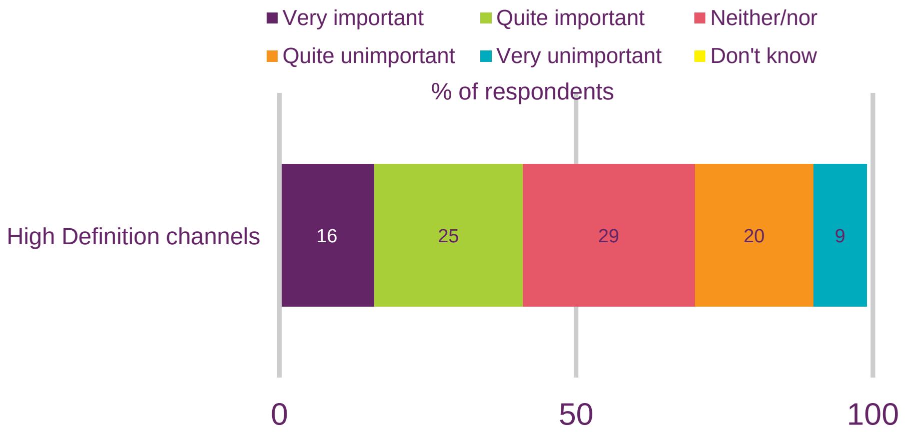
7.2.1 Views towards high definition

One of the other ways television has changed in recent years is in the proliferation of 'High Definition' channels and the increased affordability of HD ready TVs. According to the quantitative research, just under three-quarters (73%) of those who have a TV have a HD ready TV in their household.

As shown in figure 6.7 below, two in five (41%) people with a 'HD ready' television set feel that it is quite or very important that channels are available in HD, compared with 29% who think it is unimportant and 29% who think it is neither important nor unimportant.

HD channels were seen to be particular important to males (49% compared with 33% females), and those aged 35-54 (47% compared with 37% of those aged 55+ and 39% of those aged 16-34).

Figure 7.7 Importance of provision of High Definition channels



Source: GV5, Base = All those with HD TV (1,432). Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: How important, if at all, is it to you personally that High Definition channels are provided?

7.2.2 Views of PSB apps and websites

In addition to understanding preferences for scheduled and on demand content, the future of PSB also needs to consider the format in which viewers are able to engage with content. Traditional television content consists of standard programme lengths (for example 20, 30, 60 minutes long) where viewers are asked to consume the content, not engage with it. In recent years, PSB providers (and other broadcasters) have increasingly produced new types of television content, including libraries of short clips hosted on websites, and smartphone apps made to enhance or support the experience of a specific programme.

As discussed in Chapter 3, awareness of this type of content among participants at the deliberative events was mixed. Though most participants could give an example of one or two relevant broadcaster or programme websites or smartphone apps they had used, this was not a common form of engaging with television content. The quantitative research reveals that over half of people (57%) have never used a website or app provided by a TV programme to find out more about what the programme covered.

Despite being more tech-savvy, younger participants were still unlikely to download an app associated with a programme. If they needed information (such as date of next episode) about a programme they would most likely use a search engine; TV apps failed to compete for precious memory space on their device. Some younger participants were concerned that broadcasters are developing apps not because it really adds value to the viewing experience, but because they feel they should be doing it. A small number of these participants had downloaded but then deleted apps relating to programmes because they felt they were ‘boring’.

Most participants in the deliberative research thought broadcaster websites provided an additional service that was not necessarily part of the core PSB remit. For example, although the most widely recognised broadcaster website was BBC News and Sport, which participants felt competed with online newspapers for visitors; few participants claimed to use the websites provided by ITV and Channel 4.

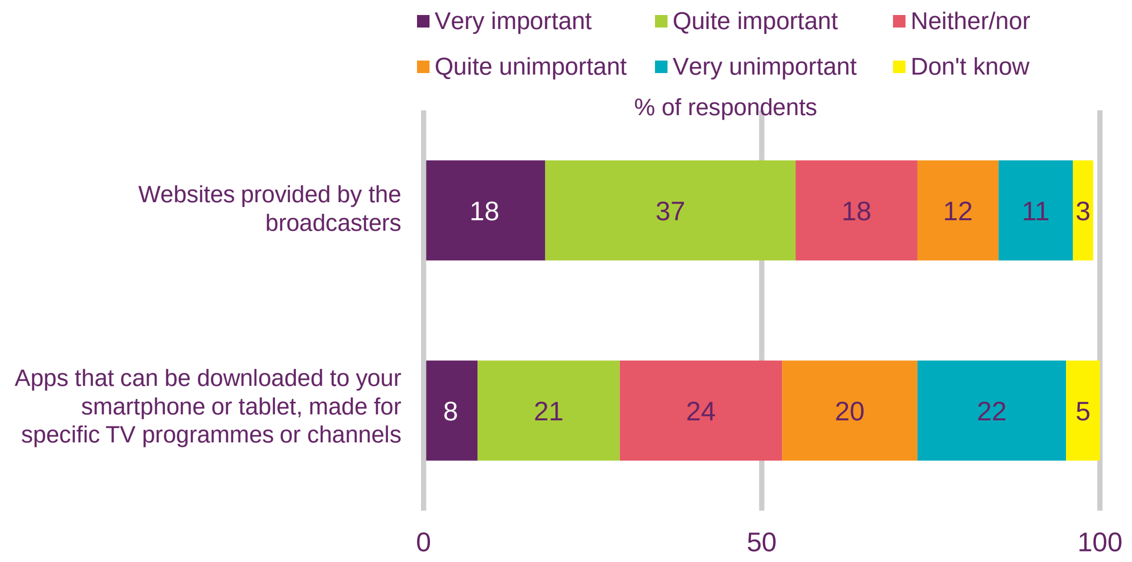
Younger participants were able to cite more examples of online channels or websites they used to access television-type content in a different way in shorter clips, such as Vine and YouTube. However this type of behaviour was limited to browsing for entertaining content; participants were equally keen to sit back and relax to watch a longer-lasting drama feature and therefore would not necessarily expect to engage with all their content online or through a small screen device.

Overall, participants struggled to envisage how the format and delivery of PSB content might evolve in this way in the future. So few participants were aware of these innovations or used them regularly (especially in relation to PSB) that it was too difficult to consider how this type of content currently fits within the PSB framework, or to consider how regulation may need to be adapted to account for this. Some also felt that this would be a ‘distraction’ from the PSB’s core purpose of making high quality, engaging programmes.

The quantitative research asked people to consider how important they felt these services were. Overall, more than half (55%) feel that websites provides by broadcasters is an important service – broadly in line with the proportion who feel that catch up / on demand services are important (56%). There is less support for the provision of smartphone apps specifically, with less than a third (29%) feeling these are important compared with 42% who feel they are not important.

Attitudes to these new formats differ by age. Younger people are most likely to think websites provided by the broadcasters are important to them personally. And three quarters (73%) of people aged 16-24 years agreeing that it is important, compared with just three in ten (30%) of those aged over 65. Similarly, over half (54%) of 16-24 year olds think that apps are important, whilst over half (62%) of those 65+ think they are not.

Figure 7.8 – Importance of broadcaster websites, and channel or programme specific apps



Source: Question GV6. Base: All respondents (2,026). Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: How important, if at all, is it to you personally that each of the following types of service are provided?

Support for these services is also closely correlated to behaviour. As shown in Table 7.1 below, people who already use websites or apps at least once a month are the most likely to feel these services are very or quite important, although it is worth noting that the importance of websites is recognised by more than half of those who never use websites or smartphone apps provided by PSB broadcasters.

Table 7.1 – Importance of websites and smartphone apps, by those who use these services

		% total overall	Use of websites or apps provided: % of those who visit websites or apps at least once a month	% of those who visit websites or apps less frequently	% of those who never visit websites or apps
Websites provided by PSBs	Very / quite important	55	78 ^	68 ^	53
	Quite / very unimportant	23	7 v	13	24
Apps made for specific programmes or channels	Very / quite important	29	51 ^	31	25 v
	Quite / very unimportant	42	25 v	36	47 ^

Source: Question GV6
Base: Total overall (2,026); visit websites or apps at least once a month (491); visit less frequently (223); never visit (961). UK adults aged 16+, July – August 2014
The symbol 'v' denotes where a figure is higher than the UK average of all adults aged 16+; the symbol '^' denotes where a figures is lower than the average.
Q. How important, if at all, is it to you personally that each of the following types of service are provided

7.3 Expectations for children's services

Though named by only 17% as being one of the most important types of programme genres to society provided on the five main channels (see Chapter 4), participants in the deliberative events agreed that broadcasters should have a responsibility to provide relevant, timely and accessible content to the youngest viewers. This sentiment is supported further in the quantitative study, which shows that close to three-quarters (72%) of people agree that it is important that TV channels other than the BBC's CBeebies and CBBC provide children's programmes (see figure 7.9).

However, participants had mixed views about whether it is important that on demand services for children's content should be provided at all. Around two in five (42%) of those who have children living with them or regularly visiting feel that these services are very or quite important, compared with a third (34%) who feel they are quite / very unimportant.

In the deliberative research, both parents and non-parents wanted to protect the provision of children's programming and thus spontaneously suggested that it was delivered through a schedule. Participants felt that given there are a now a large range of channels to choose from, it would be easy to avoid children's content if someone wanted to watch scheduled TV at the same time as children's programmes were being shown.

Some parents thought scheduled children's content was a helpful part of their routine; for example knowing that programmes are available in the time immediately after school, or that the topics of children's programmes often relate to time at which they are due to be scheduled (such as a food programme around mealtimes). However, other parents liked the flexibility provided by online or on demand content, and were comforted by the ability to show an appropriate children's programme at a time that suited them.

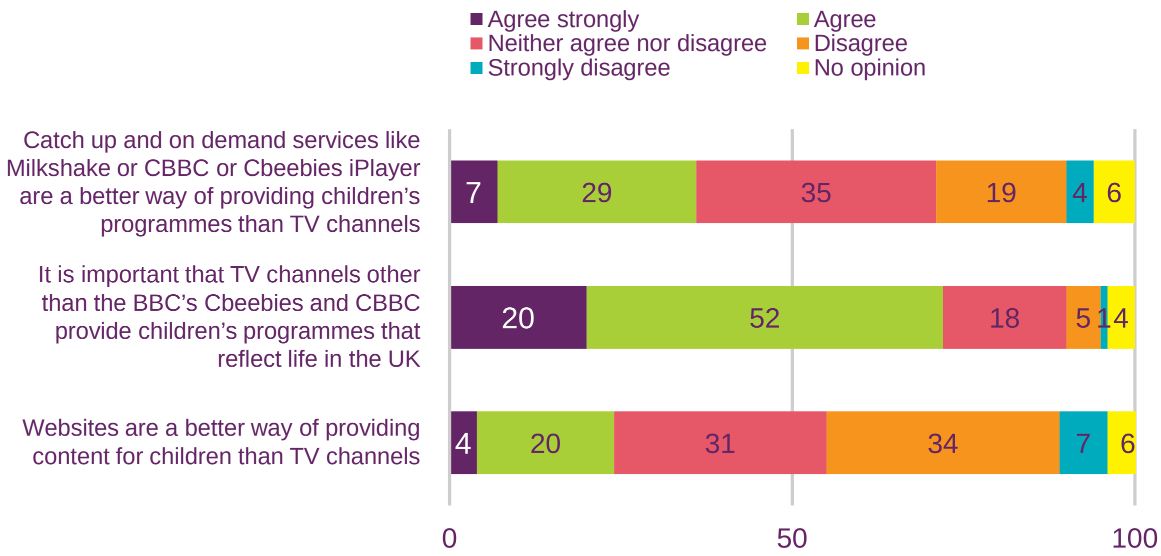
Participants also suggested that it was no longer common to sit together and watch television as a family. They felt that multiple devices and the amount of choice meant that families were less likely to watch TV together than in the past. Even when in the same room, they said it was not uncommon for families to use multiple devices to watch different shows at the same time; in some households the children would be given the main TV while in others they would watch on smaller devices while parents controlled the main screen in the room.

> *"I think the old school way of everyone sitting around the TV watching the one show will disappear. It will be people all in the same room with different equipment, watching different things."*
> London, 16-24

Findings from the quantitative research reveal a similar split in views of the value of scheduled and on demand children's programmes. Overall, parents and people who have children visiting regularly are more likely to agree (36%) than disagree (23%) that catch up and on demand services like Milkshake or CBBC or CBeebies iPlayer are a better way of providing TV content then TV channels; however people are less sure about 'websites', with less than a quarter (23%) agreeing that these provide a better way of providing content for children than TV channels (40% disagree). For both questions, a sizeable proportion are unsure which format provides the better content (35% and 31% *neither nor* respectively).

Younger age groups with children are more likely to support online and on demand content. Close to half of those aged 18-24 (46%) and 25-34 (48%) agree with this statement that catch und on demand services like Milkshake or CBBC or CBeebies iPlayer are a better way of providing children's programmes than TV channels, whilst those aged 65+ were more likely to disagree than agree with this statement (24% agree, 21% disagree and 38% said neither/nor).

Figure 7.9 – Attitudes towards the format of children's television provision



Source: Question GV8. Base: All who have a child in household or young family who visit regularly (1,042)
Interviews with 2,026 UK adults aged 16+, July – Aug 2014

Q: To what extent do you agree or disagree with the following statements about children's programmes and services

Parents (and those with children regularly visiting) from C2DE socio-economic groups are more likely to agree that catch up and on demand services are better than television programmes (40% compared with 32% of ABC1s); similarly those from ABC1 socio-economic groups are more likely to disagree that websites are a better way of providing content (45% disagree compared with 36% of C2DEs) in contrast to their wider views of on demand seen earlier in this report.

Among those who use on demand services, only 39% agree that these provide a better way of providing children's programmes, compared with 30% of those who do not use on demand services. This suggests that preference for online or scheduled children's content is driven more by lifestyle preferences, rather than use of the technology.

7.4 Generations analysis

7.4.1 Tech natives (typically aged 16-30)

Despite many young people falling into the tech native category, opinions were split on whether delivering PSB through on demand alone would be a good thing. Some initially felt it would not be a significant change for them and would spread the benefits they associate with more selective content watching – specifically they felt it would encourage PSBs to always produce high quality outputs, because they thought low quality content would never be accessed in an on demand only world. However, most young people had concerns about how this would impact on wider society, and many felt that older people or people without access to technology would miss out.

- Many were comfortable with more on-demand content, and thought it would free people from planning their lives around the TV schedule. Parents felt it would allow them to watch more of what they want.

- Many of these people still saw a role for a collective viewing experience for sport, news or event TV like X Factor.

- But many also worried that more on demand content delivery would not be beneficial to other members of society who might struggle to pay for or operate the technology necessary.

- Others thought they might miss out on factual/informative/educational content that they stumble across at the moment.

- And some felt that connectivity issues could make this new world less reliable.

- Although more likely to be using Apps and websites, they did not necessarily see this as vital, and thought that high quality programming was more important.

7.4.2 Tech learners (typically aged 30-55)

The middle-aged group responded much like the youngest group, with tech savvy participants able to imagine how PSB provision on-demand would work. However, this group were also very animated on behalf of wider society, who they thought would lose out.

- Like the youngest group, some saw value in more on-demand content, as long as some live scheduled TV remained for news, sport and event TV.

- Participants in this group often spoke up for older, or poorer people who they felt would potentially be harmed by the change.

- This group were less likely to be using enhanced content themselves, and therefore saw less value in it overall.

7.4.3 Traditionalists (typically aged 55+)

While some in this group were familiar with time-shifted viewing, few were used to accessing content whenever they wanted it. Many had concerns about what more on-demand content would mean for wider society. They worried that people would watch too much TV if they had all content available at their fingertips at all times.

- TV schedule seen to provide a welcome structure; some were worried that on-demand content would lead to too much TV watching.

- Some are using time-shifted viewing or recording TV to resolve schedule clashes.

- At best, moving PSB to on-demand would be seen as more of an inconvenience for some, while others felt they would miss out entirely as they did not have the ability to access on demand content (and had little interest in doing so).

8 Appendix

8 Appendix

This appendix includes the discussion guide used in the deliberative workshops and the questionnaire used in the quantitative survey.

8.1 Discussion guide used in qualitative workshops

Time		Content	Purpose
Pre-task		**Diary and deprivation task**	Capture viewing habits and what happens if they are disrupted.
A	10.00-10.30	**Introduction & pre-questionnaire** Parameters for discussion	Settle people into workshop and collect initial views on PSB providers. Context for later discussion
B	10.30-10.50	**Video – intro PSB** Setup as this is PSB as it has been up until today – focus on TV – but today is also for thinking about how this might look different in future and what, if anything, needs to change to reflect a changing world where we consumer content differently	Introduce concept of PSB and set-up moderators' expectations for the event i.e. to understand how PSB requirements might look different in future.
C	10.50-11.45	**Mapping exercise** Use content mentioned during pre-task and examples prepared in advance to 'map' content to PSB purposes/characteristics. Are you satisfied with the PSB content you currently get?	Help participants understand the concept of PSB purposes / characteristics and embed them in their thinking. Help understand how they interpret each (including which broadcasters are associated with each). Include overall review question: how well is the current provision meeting consumers' needs.
	11.45-11.55	**Break**	
D	11.55-12.45	**Alternatives to PSB** Where else can you get PSB-type content? E.g. web. Which websites? How does it compare (format/tone/delivery)? What are implications for PSB providers?	Gauge how consumers engage with PSB-type content in other ways e.g. online, apps, catch-up, subscription services
	12.45-13.30	**Lunch (with displays of new tech)**	Introduce idea of changing world
E	13.30-13.55	**Consumer priorities** Start the discussion around how consumers value different aspects of their public service content experience by looking at: -When they watch - scheduled/on-demand -Where they watch - at home/anywhere -What device they use - TV/other Probe: Why they do what they do. Advantages/disadvantages What would they do without different aspects of their experience How attitudes differ by providers and genres.	Explore relative importance of different aspects of the consumer PSB experience (to individuals/society). Gauge openness/readiness to enter a changing media landscape and what this means for PSB requirements.
F	13.55-14.50	**Our new world…** Continue discussion around what aspects of future consumer experience people value Probe on how attitudes differ by providers and genres. **Fifteen min break halfway (can return to displays of new tech)**	Explore participants' reactions to various future world scenarios to understand what is valuable (to individuals/society) and what the potential risks are (to individuals/society) of changes to PSB requirements in a modern world. What aspects of PSB delivery are 'must have' vs. 'nice to have' for the future.
G	14.50-15.45	**'Blank sheet' design task** If you wanted to keep PSB up to date as the world changes, what would you require from each PSB Handout blank sheets for participants to design their PSB	Understand consumer priorities for PSB in new world and opportunities for delivering PSB differently by asking them to go back to the drawing board.

		requirements for the future How do opinions differ by provider? What requirements apply to all PSBs/ which are specific? Probe on consumer need for C4 News	
H	15.45-16.00	Wrap Up & post-questionnaire	Wind down

The overall objectives of the workshops are as follows:

- To identify UK citizen-consumers' needs from, and expectations of Public Service Broadcasting, and Broadcasters / institutions now and in the next five years

- To identify any differences between the views of different age, lifestage, and other demographic groups

More specifically, the workshops will explore with the public:

1. What type of public service content do they want? How and where do they want to consume it? Exploring their individual needs states and their preferences for society as a whole. Exploring PSB in terms of its type, tone, the way it is delivered, the benefits it might deliver.

2. What do they want from the specific public service broadcasters/institutions – taking into account their material across all their media services? How satisfied are they with what they have now, what needs are not being met, how are needs changing?

3. What are their perceptions of the overall marketplace, the role of the PSBs and other providers, their views of public service content provided by other content providers. What impact do these have on expectations of the UK public service broadcasting institutions?

4. Looking to the future, what would the public like to see in terms of public service content? (for themselves, and for society as a whole)?

- How should it be delivered? Exploring platforms, providers, devices, media services

- What are the trade-offs - understanding priorities from user and citizen perspective?

    - Is it still public service if it's delivered online / on different channels/ in a different way – e.g. via websites such as bbc.co,uk, channel4.com?

    - Does enhanced programming offer significant added value?

Pre-task

- **Three day viewing diary** – recording what participants are watching, how, where, with whom, why (to include need states)

- **Two day viewing 'deprivation' diary**

Three different scenarios to be allocated:

- If use catch-up online
    - Only watch linear TV
    - Only watch catch-up/online content

- Do not watch [one of] BBC, ITV, Channel 4 or Channel 5

Timings	Questions	Notes and prompts
10:00-10:30	**SECTION A: INTRODUCTION** Pre-event questionnaires filled out as people arrive at the workshop Welcome and explaining the purpose of the day and research is being conducted on behalf of Ofcom Today we are going to be talking about content, by which we mean television programmes, film and other things you watch, read and listen to on websites, mobile phone apps, YouTube etc. We will also be using words like 'consume' and 'absorb' to describe what you are doing when you are watching / reading / listening and generally interacting with different types of content. Feel free to use whatever language you feel most comfortable with. ON TABLES Participant introductions Before we go on I would like to quickly get a sense from all of you about yourself as consuming (REMIND OF WHAT WE MEAN BY CONTENT AS ABO consume it in. We will be coming back to this throughout today so don't detail! Think back to your diaries and the kinds of thing you recorded in t **Tell me about how much TV you watch day-to-day / in a week?** **What sort of thing are you watching/reading/listening to?** **What other type of content do you take in?** **What devices are you using? Laptop, iPad, phone, TV** **Where are you doing this?** **PROBE FOR EXAMPLES** **What 'brands' or 'providers' do you engage with?** **Thinking specifically about BBC, ITV, C4, C5, do you watch these? If so, h demand, scheduled shows** *(If appropriate)* **Why do you / don't you watch BBC, ITV, C4, C5 rather tha are available?** ENSURE ALL PARTICIPANTS HAVE GIVEN YOU QUICK SUMMARY OF THEIR MOVING ON **Before we move on, can you tell me what do you know about public service broadcasting, if anything?** *Reassure they do not need to know anything the next session will include a video with more information*	In plenary and tables

	MODERATOR/NOTE-TAKER: collect media diaries and flick through while the video is playing to see what type of content people are watching, specifically which PSB providers/services they use. Look out for whether Channel 5 is mentioned and encourage C5 users to discuss their views of C5 during group discussion to limit any research effect that might result from some participants voicing negative views of C5.	
10.30-10.50	**SECTION B: PSB VIDEO** **PLENARY** *Explain we are going to show a film produced by the media regulator Ofcom that explains PSB and what it means for broadcasting today. Explain that because historically PSB was setup in a world where TV and Radio were the main media platforms the current requirements are TV - focused. But today is also for thinking about how this might look different in future i.e. can / should PSB reflect the changes in technology and how people consume content online, via websites, catch-up services, mobile apps etc.* *Show Ofcom film. Break after first video clip to ask if participants have any questions.* *ON TABLES handout PSB intro slide packs and slide packs on how regulations vary by institution.* IN PLENARY **What questions do you have about PSB?** **- did anything surprise you?**	In plenary
10:50 – 11.45	**SECTION C: PSB MAPPING EXERCISE** **ON TABLES** **Recap definition of PSB** **Taking each PSB purpose in turn…** • **Write on post-it notes as many examples as you can of television programmes and other content which meet this purpose. REMIND OF WHAT WE MEAN BY CONTENT AS PER INTRODUCTION, YOU CAN ALSO INCLUDE EXAMPLES OF SUPPORTING CONTENT E.G. APPS, WEBSITE TEXT** • Give examples of TV programmes and other content which fit under each purpose. Please write down the name of the programme and what broadcasting 'brand'/channel provides	On tables Four PSB purposes will be written on stimulus boards (one set of boards for each group) PSB characteristics will also be available on a stimulus board Pre-prepared list of content will be available

	it (if you know) e.g. BBC, ITV, Channel4, C5. • Refer participants to pre-prepared list of recent programmes on PSB channels. Explain for simplicity we have taken this list from TV listings but they can include content from anywhere – on or offline • For each purpose, probe for TV programmes and other content which they might not watch themselves but which they think is good for society as a whole or which would be of benefit to people in their household/ people they know • IF NEEDED: Explain that PSB can be defined as a mixture of things – it might be the channel providing the programme e.g. the BBC, ITV, it might relate to the genre being shown e.g. news, drama, or the intention and overall tone of a programme. DISCUSS EXAMPLES GIVEN FOR EACH PURPOSE IN TURN, ASSESS HOW EASY/DIFFICULT PARTICIPANTS FOUND IT TO THINK OF EXAMPLES FOR EACH NOTETAKER: Once the group have finished sticking post-its on each purpose label each post-it with the corresponding number for that purpose e.g. 1,2,3,4. Stick each purpose up on nearby wall so that moderator can refer back to them during the rest of the discussion. AFTER PURPOSES PRESENT CHARACTERISTICS IN TURN (NO POST-ITS) • What kinds of programmes do you watch that you would say fit this characteristic? REFER TO EXAMPLES DISCUSSED FOR PURPOSES • Do you think you get enough programmes that are high quality/original/innovative etc.? I'd like to think now about the types of programmes that you see as achieving these purposes, what kind of 'genres' do they sit under... • MODERATOR: AFTER GROUP HAS WORKED THROUGH EACH PURPOSE, MAP POST-ITS ORGANICALLY ACCORDING TO TYPES OF PROGRAMME. THIS MIGHT INCLUDE - COMEDY, NEWS (NATIONAL, LOCAL), FACTUAL, DRAMA... INVITE PARTICIPANTS TO HELP, GROUPING THEIR POST-ITS TOGETHER WITH OTHERS THAT ARE SIMILAR • MODERATOR USE MARKER PEN TO MARK GENRE HEADINGS E.G	

	COMEDY, NEWS PROBE FULLY ON GENRES • Why haven't we put much under INSERT GENRE? Why is there lots under INSERT GENRE? Etc. • Are some genres more important to you than others? Which? Why? o And to society? Why? • Are some genres better catered for than others? Which? Why? • **Thinking about what you have just seen on the video, how important or not do you think PSB is to society? Why / why not?** • **Could you imagine a world without PSB? How would it be different? Would it be better/worse/no real difference** • **What sort of value do you think this content has to you and others, beyond entertainment?** REMIND THAT EVERY FIVE YEARS OFCOM RUNS A REVIEW OF PSB AND ASKS THE PUBLIC WHAT THEY THINK THE IMPORTANCE OF PSB IS TO SOCIETY **HOLD UP SLIDE SUMMARISING PAST RESEARCH AND READ OUT PROBING LINE BY LINE** • **How far would you agree/disagree with each point? Why/why not?** • **Anything to add/remove? Why?** **<u>Specific probes:</u>** • Protecting UK cultural identity – how is PSB important for this? What would be the impact of a world without PSB? What role do the five PSB broadcasters play? • Catering for everyone – why is PSB important for this? Etc. • Stumbling across programmes/information unintentionally – would this happen to the same extent if we didn't have the PSB broadcasters? • High-quality content – would you have as much access to this	

	in a world without PSB? • Social aspect – what are the social benefits/drawbacks of PSB compared with watching on-demand or box sets? Do we lose/gain anything in a world without PSB? <u>FOR GLASGOW / SWANSEA / BELFAST:</u> • How important do you think it is for PSB to portray content that relates to Scotland / Wales / Northern Ireland? Why? • *Moderator note whether 'national' is used to refer to regional i.e. of that specific nation or the whole of Great Britain. Be sensitive to this throughout remainder of discussion.* **<u>ALL LOCATIONS</u>** **Overall, how happy would you say you are with the PSB content that you consume? Why/why not?** Do you feel you get enough content that achieves the purposes we have just discussed? POINT TO PURPOSES AND CHARACTERISTICS ON NEARBY WALL. Are some purposes / characteristics being met better than others? Which? Why? POINT OUT ANY THAT PARTICIPANTS STRUGGLED TO FIND EXAMPLES OF PROGRAMMES FOR.	
11.35-11.45	**BREAK**	
11:55 – 12:45	**<u>SECTION D: ALTERNATIVE PSB SERVICES/PROVIDERS</u>** **<u>PLENARY</u>** **Lead moderator thanks participants for contributions so far and introduces the rest of the morning session…** **<u>ON TABLES</u>** **Thinking about all the different programmes and other types of content we discussed before the break, how has the way you engage with this changed in the last few years?** **Think about the impact, if any, of:** - Internet at home / on phone	This section of the discussion is to introduce the idea of PSB-type content on other channels/platforms to see what PSB providers can learn/improve on Note to moderator: important that participants bear in mind that the focus should be

	- Owning more devices to view content - Availability of catch up/on-demand/ online services - Increasing number of brands e.g. BBC, Netflix, BuzzFeed And how are they likely to change in the future? **Now I'd like us to talk a bit more about these changes and where else you are going to at the moment to get PSB or PSB-like content...Who else do you think of as providing it? Where else can you access it?** PRESENT SHOWCARD OF PSB-RELATED SERVICES WORK THROUGH THE FOLLOWING GROUPS OF ALTERNATIVES AND DISCUSS IN TURN **First let's think about <u>PSB providers</u> and content that they are related to** (even if it is not PSB content itself REMIND OF INTRO VIDEO AND THE FACT THAT BBC IS THE ONLY INSTITUTION WHERE ALL CONTENT ACROSS ALL CHANNELS AND PLATFORMS IS REQUIRED TO MEET PSB PURPOSES/CHARACTERISTICS).... -ON-DEMAND SERVICES RUN BY PSB BROADCASTERS (E.G. BBC iPlayer, 4OD) - WEBSITE SERVICES RUN BY PSB INSTITUTIONS (E.G. CHANNEL4.COM, BBC.CO.UK, BBC Sport, BBC Arts) - OTHER CHANNELS RUN BY PSB BROADCASTERS (E.G. BBC3, BBC4, MORE 4, E4, FIVE*, ITV2, ITV3) MODERATOR: probe fully on the way consumers are using alternative services/providers and what, if any, value they are seen as having compared with the PSBs - **Do you use these services / channels?** - **How does the content they provide fit with the PSB purposes and characteristics – REFER BACK TO Ps AND Cs ON NEARBY WALL** - **Tell me about the content / tone of what these providers / services offer? Is it different from their core PSB channels?** - **How much do you value the content / service you get from these providers? Why?** - **What would you do without them? PROBE SPECIFICS AS RELEVANT TO PARTICIPANTS E.G. IF MENTION BBC iPlayer – What**	on PSB content rather than content more generally – refer back to PSB purposes/institutions where necessary Note to moderator – if discussion of data protection and security (i.e. on the internet/with new tech) comes up allow participants to voice any concerns they have about broadcasters operating in this space. It is not the focus of the research so cover briefly and move on.

	would you do if the iPlayer no longer existed? Where would you go for this kind of content instead? **Thinking about website services specifically, what are the advantages / disadvantages of accessing PSB and PSB-type content via a website?** **Can the PSB purposes and characteristics be achieved using a website? Which genres are more / less relevant for a website? E.g. news, factual,** **And what about <u>other providers</u> and what they offer?** PRESENT SHOWCARD OF NON-PSB ALTERNATIVES - OTHER TV CHANNELS (E.G. DAVE, YESTERDAY, PICK, FOOD NETWORK, SKY NEWS, AL JAZEERA, SKY ATLANTIC ETC) - OTHER ON-DEMAND SERVICES (E.G. NETFLIX, SKY, VIRGIN TV, YAHOO SCREEN, YOUTUBE, LOVEFILM, AMAZON PRIME INSTANT VIDEO) - - OTHER WEBSITE SERVICES (E.G. VICE, BUZZFEED, SKY NEWS, OTHER NEWSPAPER WEBSITES) **Do you use these services / channels?** - **To what extent, if at all, does the content they provide fit with the PSB purposes and characteristics – REFER BACK TO Ps AND Cs ON NEARBY WALL** - **Tell me about the content / tone of the PSB-like content that these providers / services offer?** - **How much do you value the PSB-like content / service you get from these providers? Why?** - **What would you do without them? PROBE SPECIFICS AS RELEVANT TO PARTICIPANTS E.G. IF MENTION Netflix – What would you do if Netflix no longer existed? Where would you go for this kind of content instead?** - **Should PSB providers be producing (more) things like this? Why? How?** **PLENARY** **Round-up morning session and explain arrangements for lunch – as you are eating please take a walk around and look at the examples of new tech that are setup around the room.**	

12:45 – 13.30	**<u>LUNCH</u> (and coffee).** **Three manned demo tables** available during lunch – all participants to circulate and have a look at the demos – moderators/note-takers to spend time discussing the examples with participants on their tables note participants' spontaneous reactions, interest, questions **- an iPlayer or 4oD catch-up programme which includes viewer interaction (e.g. past viewers have fed in live tweets as part of programme content**) – Fish Fight *(This is to introduce catch-up and the idea of enhanced TV programmes)* - **a website where you can get additional / supplementary content not broadcast** – BBC Website, 4Shorts *(This is to show that there are other ways to provide additional content)* - **an app that supports a TV programme –** Embarrassing Bodies health checker app - *FOUR SCREENSHOTS PER TABLE* *(This is to show how apps like this can work*)	Moderators/note-takers will take turns to supervise demos during lunch
13.30-13.55	**<u>SECTION E: CONSUMER PRIORITIES</u>** **<u>PLENARY</u>** **Lead moderator introduces afternoon session and thanks participants for contributions so far.** **In the next part of the discussion we are going to go into more detail on your <u>personal experience</u> of consuming and engaging with public service content. By that we mean listening to, watching, reading the kind of public service content we've been discussing, We have discussed lots of different providers but for this part our focus is on the PSB providers that we started off the day hearing about – BBC, ITV, Channel 4,Channel 5.** **We want to know what aspects of your experience you could imagine living without and which not.** **Remember to think about what is available on and offline, whether you access this content at home or on-the-go.** *NOTE THE DISCUSSION NEEDS TO STAY FOCUSED ON PUBLIC SERVICE CONTENT THROUGHOUT NOT CONTENT MORE GENERALLY* **<u>TABLES</u>**	

	Recap lead moderators introduction and focus of this session *QUICK CHECK ON WHO HAS AN iPHONE, SMARTPHONE, TABLET, LAPTOP, KINDLE* *USE YOUR JUDGEMENT TO DECIDE WHICH ORDER IS MOST APPROPRIATE TO THE GROUP i.e. IF OLDER PARTICIPANTS IT MAY MAKE SENSE TO START WITH DISCUSSION AROUND DIFFERENT LOCATIONS AND DEVICES WHICH THEY MIGHT NEED MORE PROMPTING ON, THEN MOVE TO SCHEDULED vs. ON-DEMAND.* *Refer participants back to their diaries throughout and the examples of engaging with content that they recorded* **<u>SCHEDULED VS. ON-DEMAND</u>** PARTICULARLY FOR OLDER AGE GROUPS **Thinking back to the types of programmes we discussed this morning that were PSB (REFER PARTICIPANTS TO Ps AND Cs STUCK UP ON THE WALL)….** **Tell me more about whether you watch this content at a scheduled time or at a time you have chosen? When / why do you choose one over the other? PROS / CONS** **Imagine you could no longer watch PSB on scheduled TV?** How would you feel? What would you lose / gain? PROBE social aspect of knowing others are watching at same time, PROBE for any social aspects associated with watching content online PROBE ON IF / HOW THIS DIFFERS BY GENRES **Does the type of programme make a difference to whether you prefer to watch it at a scheduled time or on-demand?** E.g. Eastenders – do you value watching it when you know others are / when suits you? Why? **What about news?** PROBE ON IF/HOW THIS DIFFERS BY PSB PROVIDER: BBC, ITV, Channel 4 or Channel 5 **Do you expect the same kind of access to scheduled or on-demand content from each broadcaster?** Or, for example, do you have different expectations from BBC than Channel 4? **Thinking about others you know – friends, family, younger / older people – how important is it for them that PSB content is accessible at a**	

scheduled time or on-demand? Why?

Thinking from the perspective of society…how valuable is it that PSB content is available at a certain time or on-demand? Why?

<u>LOCATION</u>

PARTICULARLY FOR YOUNGER AGE GROUPS

Tell me more about where you watch PSB content – At home? On the go? At work? Where else? PROS / CONS OF EACH

PROBE ON IF / HOW THIS DIFFERS BY GENRES:

Are there some types of content/programmes that are better suited to watching at home / on-the-go? What? Why? PROBE news websites, bite-sized pieces of content

PROBE ON IF/HOW THIS DIFFERS BY PSB PROVIDER / SERVICE: BBC, ITV, Channel 4 or Channel 5, bbc.co,uk, channel4.com

Do you expect the same kind of access to content at home / on-the-go no matter which PSB provider? Or is it more / less important you can access content from say BBC or Channel 5 on-the-go? Why / why not?

Thinking about others you know – friends, family, younger / older people – how important is it for them that PSB content is accessible at home / on-the-go? Why?

Thinking from the perspective of society…how valuable is it that PSB content is available at home / on-the-go? Why?

<u>DEVICE</u>

PARTICULARLY FOR YOUNGER AGE GROUPS

Tell me more about which devices you use to consume PSB content…

For example, watching/reading something on websites like BBC News online, or sitting down to watch a Channel 4 drama on TV or your iPad

PROBE TV, smartphone, laptop, iPad

Why / in what context do you do this? What are the pros / cons of each?

PROBE ON IF / HOW THIS DIFFERS BY GENRES:

Do you expect the same kind of access to TV content no matter what the genre? Or is it more important you can watch some genres on TV

	than others? E.g. documentaries, news, soaps PROBE ON IF/HOW THIS DIFFERS BY PSB PROVIDER: BBC, ITV, Channel 4 or Channel 5 **Do you expect all PSB providers to give you the same kind of access to content? i.e. via TV or other devices?** Why / why not? **Thinking about others you know – friends, family, younger / older people – how important is it for them that PSB content is accessible on different devices?** Why? **Thinking from the perspective of society…how valuable is it that PSB content is accessibly on different devices?** Why?	
13.55-14.50 (Include 10/15 min. break. Moderators to agree when so that all participants break at the same time.)	**SECTION F: OUR NEW WORLD** **PLENARY** **Now we're going to think about how your experience of consuming public service content might be different in future, how changes to technology and the way PSB providers deliver content and the content itself might change…** **Some of the changes we are going to discuss you might be familiar with and some of the public service broadcasters are already doing these things. Others might require a bit of imagination.** **We are interested to know what you think you, personally, and society as a whole, stand to lose or gain in this new world.** **TABLES** SPLIT TABLE INTO PAIRS OR TWO GROUPS (E.G. OLDER GROUPS MAY WORK BETTER IN TWO BIGGER GROUPS) IF YOU HAVE PARTICIPANTS WHO SEEM TO BE MORE 'ABLE' SPLIT THEM BETWEEN GROUPS ASSIGN EACH PAIR ALL THREE 'NEW WORLD' SCENARIOS ASK PARTICIPANTS TO DISCUSS PROS AND CONS OF EACH WORLD AND TO SUMMARISE THEIR DISCUSSION INTO 'PROS' AND 'CONS' HANDOUT PLAIN PAPER HANDOUT SHOWCARDS DESCRIBING EACH NEW WORLD **WRITE UP ON FLIPCHART KEY QUESTIONS FOR PARTICIPANTS TO CONSIDER:** • What would be better about this world for you personally? • What would be better for society? Younger / older relatives? • What would you miss that you have now? • What would others in society miss? Younger / older relatives?	

	• Do your views differ depending on which provider you are thinking of e.g. BBC, ITV, C4, C5? Why? Do your views differ depending on genre e.g. news, documentary, drama, regional content? Why? **<u>NEW WORLD 1:</u>** **Imagine a world where only some public service content was broadcast on TV. Some content, such as major sporting or news events would still be broadcast on television, but there would be <u>much more online,</u> with some genres and channels being only online.** **<u>NEW WORLD 2:</u>** **Imagine a world where all public service content is distributed via the web only, scheduled PSB TV no longer exists. Smart TVs are the norm and they allow people to stream content from the web and watch it on-demand.** **<u>NEW WORLD 3:</u>** **Imagine a world where lots of public service content is enhanced/extended - where lots of content has an interactive element or is provided as a follow-up to the main programme (e.g. live twitter feed, short clips online, additional educational material, programme-related games, apps etc.)** ASK ONE SPOKESPERSON FROM EACH PAIR TO FEEDBACK, DISCUSS PROS AND CONS OF EACH IN TURN, DO THE REST OF THE GROUP HAVE ANYTHING TO ADD? USE THE SAME PROBES AS ABOVE (THE ONES WRITTEN UP ON THE FLIPCHART) MODERATOR FLIPCHART LIST OF PROS AND CONS FOR EACH WORLD MAKE SURE TO PROBE AROUND WHAT SOCIETY GAINS / LOSES DURING GROUP DISCUSSION IN CASE IT HAS NOT BEEN DISCUSSED BY THE GROUPS **How would what you watch / consume be different in this world? Would you watch / take in more or less PSB? What would you be watching / consuming instead? PROBE other channels, online services e.g. Netflix, Dave** **<u>KEY PROS AND CONS TO DISCUSS</u>** - Shared experiences – e.g. all of UK watching same TV show at the same time (EastEnders, One Born Every Minute, World cup, London 2012, 6 o'clock News) - Choice (more channels and services) - Flexibility (more opportunity for personalisation) - Discovering new content / surprises - Recommended content (e.g. online)	

	Favourite new world? Why?	
14.50-15.45	**SECTION G: BLANK SHEET DESIGN TASK** **PLENARY** **Final task for the day…** **We're going to do something a bit different. I would like you to pretend that you are in charge of ensuring that PSB is kept up to date with the changing times. You work at Ofcom, the regulator in charge of monitoring all media and communications in the UK.** **Remember the range of programmes and ways of watching or consuming content that we have discussed today, and the examples of new technology that we saw at lunch.** **Remember not everyone in society wants or needs the same thing from PSB – for example younger audiences consume content in different ways to older ones. Think about what that means for ensuring that everyone's needs are met properly.** PRESENT OFCOM SLIDES EXPLAINING THE STATUS QUO AND HOW CURRENT REGULATIONS DIFFER BY PROVIDER REFER PARTICIPANTS TO PURPOSES AND CHARACTERISTICS STUCK UP ON NEARBY WALL **These purposes and characteristics remain but the requirements that Ofcom makes of the PSB providers could change…** WORK IN PAIRS (OR TWO GROUPS DEPENDING ON 'ABILITY' OF GROUP) HANDOUT 'BLANK SHEET' GRID HANDOUT COLOURED STICKERS WRITE ON FLIPCHART THE COLOUR KEY: PURPLE – LOCAL NEWS BLACK – NATIONAL NEWS ORANGE – DRAMA GREEN – FACTUAL BLUE – NON-NEWS REGIONAL CONTENT **I'd like you to place stickers in the boxes to show what you think it is important that each provider is required to provide as part of their PSB remit** **Ofcom's resources are limited so you will need to make some hard choices about what to protect. This might mean not all types/genres of programme are provided by every PSB.** **So you don't have to put a sticker in every single box e.g. if you don't think it is vital that C5 provides you with news at a scheduled time don't place a purple or black sticker in the 'scheduled TV' box etc.**	

	I also want you to prioritise, so you can't put all the stickers in the ALL PROVIDERS column. You need to choose what is most important for society. THINK ABOUT: • Providers / brands – are they all as important as each other? Should some requirements apply to all? Are some more specific? Why? • Different genres (factual content, drama, regional content etc.) – are some more important to protect than others? Why? • Think about different devices – TV, laptop, phone – should investment go on making content accessible via all of these? Or are some more important than others? Why? • And different services (e.g. TV programme, website text/videos/images) – should investment go into producing more website content? Why? GIVE THEM TEN MINUTES THEN OPEN DISCUSSION TO UNDERSTAND WHAT THEIR **PRIORITIES** ARE FOR REGULATION GIVEN RESOURCES WILL BE LIMITED **PLENARY 3.30 – 3.45** TABLE MODERATORS SUMMARISE KEY POINTS FROM FINAL EXERCISE AND REST OF THE EVENT PARTICIPANTS FROM OTHER TABLES ALLOWED OPPORTUNITY TO ASK QUESTIONS	
15:45 – 16:00	**SECTION H: WRAP UP:** Lead moderator sums up final comments to Ofcom. Explanation of what the research will be used for. Post event questionnaires. Incentives (collect pre-tasks and administer extra incentive to everyone who has completed pre-task)	

8.2 Questionnaire used in quantitative survey

14-033153 Ofcom PSB Review 2014 Questionnaires

Good morning, afternoon, evening. My name is …… from Ipsos MORI, the research organisation, and we are carrying out a survey for Ofcom, the independent body set up by the Government to oversee broadcasting and telecommunications in the UK. We'd like you to answer some questions about **television in the UK** – what's good and bad about it, and which channels should show which type of programmes. We also want to find out your views about the internet and other types of media (such as On-demand services, radio, newspapers etc.). This is your opportunity for you to help shape the future of television. The survey will take about 30 minutes.

I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual or address in the results.

I'd like to start by asking a few questions for classification purposes.

QA DO NOT ASK Code gender

Male
Female

QBi Firstly, how old are you?

Type in
Refused

Ask QBii if respondent refuses at QBi
QBii In that case, please can I ask which of the groups on this card you fit into? Please just read out the letter that applies.
SHOWCARD A
Single code

a) 16-17
b) 18-24
c) 25-34
d) 35-44
e) 45-54
f) 55-64
g) 65-74
h) 75+
Ref

QC Which of the following best describes what you are doing at the moment? Please read out the letter that applies.
SHOWCARD B
Single code

a) Working full-time (30hrs a week or more)
b) Working part-time (8-29 hour a week)
c) Not working (under 8 hours a week) and retired
d) Not working (under 8 hours a week) and unemployed, registered / unregistered but looking for work
e) Not working (under 8 hours a week) and a student
f) Not working (under 8 hours a week) and stay-at-home parent
g) Not working (under 8 hours per week) Other
h) NOT ON SHOWCARD Don't know / refused

QD Which of the groups of this card, if any, would you say you belong to?
SHOWCARD C
Single code
CODING INSTRUCTION: Code any of 1-4 as 'White British'

WHITE
1. English
2. Irish
3. Scottish
4. Welsh
5. Any other white background

MIXED
6. White and Black Caribbean
7. White and Black African
8. White and Asian
9. Any other mixed background

ASIAN OR ASIAN BRITISH
10. Indian
11. Pakistani
12. Bangladeshi
13. Any other Asian background

BLACK OR BLACK BRITISH
14. Caribbean
15. African
16. Any other black background

CHINESE OR OTHER ETHNIC GROUP
17. Chinese
18. Any other background

19. NOT ON SHOWCARD Refused

The next few questions ask about the adults and children that live in your household, this will help us make sure you are asked the right questions later in the survey.

QE In total how many people live in your household including yourself and any children.

Ask if number of people at QE is more than 1
QF And how many children under the age of 16 live in your household?

Ask if have children under 16 in household at QF
QH And are you the parent or guardian of [the child in the household / any of the children in the household]?
Single code
Text edit based on answer to QF.

1. Yes
2. No
3. Don't know / refused

Ask all
QI
If code 1 at QF: In addition to the child that lives in your household, do
If code 2 or more at QF: In addition to the children that live in your household, do
If code 0 at QF: Do
… you have any grandchildren, nieces or nephews aged under 16 that visit on a regular basis, that is at least a couple of times a month?
Single code
Text edit based on answer to QF.

1. Yes
2. No
3. Don't know / ref

Television and online ownership and behaviour

Thank you for answering those classification questions. I'd now like to ask you some questions about mobile phones, television and the internet.

TO1 Which, if any of the following devices do you personally use at home?
PROBE: any others?
SHOWCARD D (R)
Multi code

1. PC / Mac / Laptop / Netbook
2. **Tablet computer** (e.g. iPad / Kindle Fire HD)
3. **Games console** connected to a TV (e.g. PlayStation / Xbox / Wii / PS3)
4. **Smartphone** (i.e. a phone on which you can easily access emails, download files and applications, and generally surf the internet, e.g. BlackBerry, iPhone and Android phones such as the Samsung Galaxy)
5. A **mobile phone** without internet access
6. A **television**
7. A device (sometimes built into your TV) that has a **hard disc and allows you to pause, rewind and record live TV programmes**? These are sometimes known as PVR (personal video recorder) or DVR (digital video recorder)

8. NOT ON SHOWCARD None of the these
9. NOT ON SHOWCARD Don't know

Ask all who personally use a TV (code 6 at TO1)
TO2.
Thinking about all the television sets you have at home. Do you have...
READ OUT – REVERSE STATEMENTS.
SINGLE CODE FOR EACH

A. **A smart TV** that can be connected to the internet? This is sometimes referred to as a "Connected TV" or "Hybrid TV".
   CLARIFY IF NECESSARY: this a new type of TV connected to the internet that can display on-line content directly onto your TV screen without the need for a computer; set-top box or games console.
B. **a 'HD TV'?** By that I mean a television that will allow you to watch programmes in high definition.
C. **An integrated digital television** without a set-top box? This is a television set with a built in digital tuner
D. Any other type of TV

1. Yes
2. No
3. Don't know

HARD CHECK: IF CODE 2 OR 3 AT ALL TO2a-d.
Can I just check. You previously mentioned you have a TV in your household, is that correct?

Yes – recode TO2d and to 'yes' other type of TV
No – go to TO1 and revise code 6 (TV)

ASK ALL.

TO3 Through which of the following ways do you watch television programmes in your household at the moment?
Please select all that apply, including if you have multiple television sets, or watch TV programmes online.
PROBE: Any other method?
SHOWCARD E (R)
Multi code

1. Access TV programmes/films online via the internet (e.g. iPlayer, Netflix)
2. Cable TV (e.g through Virgin Media)
3. Satellite TV (e.g.Sky) with paid subscription
4. Satellite TV (e.g. Freesat) with no monthly subscription
5. Satellite TV (other)
6. Freeview (with or without a set-top box) with ONLY free channels
7. Freeview (with or without a set-top box) with free channels PLUS pay a subscription for additional programmes
8. You View
9. BT Vision or Talk Talk (or similar)
10. Access TV via other internet connected player or box that you use for viewing TV/ video content connected to a TV (e.g. Roku/ Apple TV/ Google TV/Google Chromecast /Now TV)
11. Other (type in)
12. No TV set in household and do not access TV content via the internet [single code]

13. NOT ON SHOWCARD Don't know [single code]

HARD CHECK: If no TV selected at TO1 (code 6) and any of codes 2-10 at TO3.
Can I just check. You previously mentioned you do not have a TV in your household, is that correct?

Yes – return to TO3 and check response code.
No – go to TO1 and revise code 6 (TV)

TO4 Now thinking about all the different ways in which you watch television, which of these television channels, if any, would you say you watch regularly at home or anywhere else? That is a few times a week or more often..
INTERVIEWER INSTRUCTION: THIS INCLUDES; LIVE TELEVISION, TIME SHIFTED TV, LIKE CATCH UP AND ON DEMAND PERSONAL/DIGITAL VIDEO RECORDERS

Multi code
SHOWCARD F (R)
[DP please use different codes for different nations as below]

1. BBC One
2. BBC Two
3. BBC Alba (Scotland code)
4. ITV [England code]
   ITV Wales [Wales code]
   UTV [NI code]
   STV [Scotland code]
5. Channel 4
6. S4C [Wales code]
7. Channel 5

8. NOT ON SHOWCARD None of them
9. NOT ON SHOWCARD Don't know

TO5 Which other television channels, if any, would you say you personally watch regularly at home or anywhere else? That is a few times a week or more often.
PROBE: anything else?
INTERVIEWER INTRUCTIONS: WHEN RESPONDENT MENTIONS A +1 CHANNEL, E.G CHANNEL 4+1, CODE AS MAIN CHANNEL I.E Channel 4
Multi code
SHOWCARD G (R)

- 1. BBC3, BBC4, BBC NEWS Channel, BBC Parliament
- 2. CBeebies, CBBC
- 3. ITV2, ITV3, ITV4
- 4. CITV
- 5. More4, E4, Film4, 4music, 4Seven
- 6. Five*, Five USA, Five + 24
- 7. Other channels that are free (e.g., Dave, Pick TV, Yesterday, Viva)
- 8. Other channels that come as part of your pay TV subscription (e.g. Sky Sports 1, , Sky Movies 1, 2, Sky Sports News, BT Sports, ITV Encore, Comedy Central, Watch, Gold, MTV, Magic TV)

9. NOT ON SHOWCARD: Don't know

SOFT CHECK: If [code 0 at QF and codes 2 or 3 at QI] and either code 2 or 4 at TO5
Can I just check, you mentioned earlier that you don't have any children living or regularly visiting your household, do you personally watch CBeebies, CBBC, CiTV regularly?

1. Yes – continue.
2. No – please return to TO5 and amend answer.

SOFT CHECK: If no channels selected at TO4 or TO5 (If code 8 or 9 at TO4 and 9 at TO5)
Can I just check. Do you watch any TV channels?

Yes, but not one of those listed – return to TO5 and check response to codes 7 and 8.
No – continue.
INTERNET USE

NEW SCREEN
I'd now like to ask you some questions about using the internet.

TO7 Do you personally use the internet?
Single code

1. Yes
2. No

HARD CHECK: If code 1 at TO3 (access TV through internet) and code 2 at TO7.
Can I just check. You previously mentioned that you access TV through the internet, is that correct?

Yes – return to TO7 and amend code.
No – return to TO3 and amend code.

ASK IF YES AT TO7 IF NO AT TO7 SKIP TO TO12
TO8 Where do you access the internet?
PROBE: anywhere else?
SHOWCARD I
Multi code

1. At home
2. At work (out of home)
3. On mobile device e.g. phone / tablet outside of home
4. At a public place using a fixed terminal e.g. internet café / library
5. At university / college
6. At school
7. Elsewhere friends / relatives etc.

8. NOT ON SHOWCARD Other (type in)
9. NOT ON SHOWCARD Don't know

ASK IF YES AT TO7
TO9 And which of these methods do you personally use to connect to the internet at home or anywhere else?
PROBE: any other methods.
SHOWCARD J (R)
Multi code
CODING INSTRUCTIONS:
CODE AS MOBILE ONLY HOUSEHOLD IF ONLY CODES 2-4 SELECTED AT TO9

1. **Fixed broadband** through a phone line or cable service – perhaps using a Wi-Fi router. This includes fibre broadband, 'superfast', and ADSL services
2. **Using a mobile phone or smartphone** – through a Wi-Fi network or your phone's mobile network
3. **Connect via a USB stick or dongle for the internet using your tablet computer, desktop or laptop**
4. **A tethered internet connection** using your mobile phone's internet connection
5. Ordinary phone line – dial-up access
6. Other (type in)

TO10 And thinking about all the different ways in which you access and use the internet, how often do you tend to use the internet?

Single code
SHOWCARD K (R)
INTERVIEWER – IF RESPONDENT NOT SURE ASK THEM TO ESTIMATE
CODING INSTRUCTIONS:
CODE AS 'DAILY / ALMOST DAILY' IF CODES 1-4 SELECTED AT TO10

1. Three or more times a day
2. Twice a day
3. Once a day
4. Several times per week
5. A few times per month
6. At least once a month
7. Less frequently
8. Never
9. NOT ON SHOWCARD Don't know

HARD CHECK: If access the internet (code 1 at TO7) and code 9 at TO10.
Can I just check. You previously mentioned you access the internet, is that correct?

Yes – return to TO10 and amend code.
No – return to TO7 and amend code.

TO11 There are lots of different ways viewers can engage with television programmes, including online or through social media. How often, if at all, do you do each of the following?
SINGLE CODE FOR EACH
SHOWCARD K (again)
ROTATE STATEMENTS.
INTERVIEWER – IF RESPONDENT NOT SURE ASK THEM TO ESTIMATE

A. Use websites or apps provided by TV programmes to find out more about what the programme covered
B. Join conversations about TV programmes on social media, such as on Twitter or Facebook

1. Three or more times a day
2. Twice a day
3. Once a day
4. Several times per week
5. A few times per month
6. At least once a month
7. Less frequently
8. Never
9. NOT ON SHOWCARD Don't know

NEW SCREEN
The next few questions are about the different ways people watch television, including through online and on demand services.

ASK ALL
TO12 How often, if at all, do you watch television programmes or films online or through an 'on demand service'? This could be via any device; so it could a TV set or another device such as a tablet or games console. For example BBC iPlayer, 4OD, Sky On demand, Sky Go, Virgin On-demand, Netflix.
Single code
SHOWCARD K (again)

1. Three or more times a day
2. Twice a day
3. Once a day
4. Several times per week
5. A few times per month
6. At least once a month
7. Less frequently
8. Never

9. NOT ON SHOWCARD Don't know

ASK IF CODE1-8 AT TO12
TO13 And in which of these ways do you personally watch <u>television programmes online or on demand</u> at home or anywhere else? Again, please think about all the different ways you access this type of content.
SHOWCARD L (R)

Television set
1. **Television set-top box** (e.g. Virgin, Sky, BT, Talk Talk, FreeView)
2. **A smart TV:** a new type of TV that can be connected to the internet and can display on-line content directly onto your TV screen without the need for a computer; set-top box or games console.
3. **Games console** with internet access connected to a TV (e.g. PlayStation/ Xbox/ Wii/ PS3)
4. Other internet connected **player or box that you use for viewing** TV/ video content connected to a TV (e.g. Roku/ Apple TV/ Google TV/Google Chromecast /Now TV)

Mobile phone:
5. **Smartphone** (i.e. a phone on which you can easily access emails, download files and applications, and generally surf the internet, e.g. BlackBerry, iPhone and Android phones such as the Samsung Galaxy)

Computer
6. **PC / Mac / laptop / netbooks**
7. **Tablet** computer (e.g. iPad/ Kindle Fire HD)
8. **Other**

9. NOT ON SHOWCARD None of the these
10. NOT ON SHOWCARD Don't know

ASK IF USE ON DEMAND SERVICES AT LEAST ONCE A MONTH AT TO12 (CODES 1-7)
TO14 Which, if any, of the following services do you use to watch television programmes or films online or on demand? Please tell me which services you use at least once a month or more often? (IF NECESSARY READ: I mean full length programmes or films).
PROBE: anything else?
Multi code
SHOWCARD M (R)

1. BBC iPlayer
2. 4OD
3. ITV Player
4. *Region text edit:* [ITV Wales/STV/UTV] player
5. Demand 5
6. Milkshake player
7. Dave on Demand
8. Sky TV on Demand,
9. Sky Go,
10. Sky Go Extra,
11. Sky Store
12. Now TV
13. Virgin TV on-demand,
14. Virgin TV anywhere
15. BT player
16. Talk Talk Player
17. Google play
18. iTunes
19. Netflix
20. Amazon Prime instant video (formerly LoveFilm)
21. Blink Box
22. X box video
23. YouTube (full programmes or films, not short clips)

24. NOT ON SHOWCARD: Other (please specify)
25. NOT ON SHOWCARD: None of these
26. NOT ON SHOWCARD: Don't know

ASK ALL

TO15 I'd like you to think about all the different ways in which you watch TV programmes or films, either on scheduled TV, recorded TV, catch-up TV or other on demand services. On an average day how many hours would you say you watch television?

INTERVIEWER INSTRUCTIONS; CLARIFY IF NECESSARY:
by scheduled television, I mean scheduled programmes watched at the time of broadcast as detailed in the TV listing),
by Catch-up TV, I mean using a service like BBC iPlayer or 4OD to watch a TV programme after it has been shown at a scheduled time
by on demand I mean a service that allows you to watch TV programmes/films of your choice, at a time that is convenient to you. For example Sky On demand, Virgin TV on demand, Netflix.

Single code
SHOWCARD N (R)
INTERVIEWER – IF RESPONDENT NOT SURE ASK THEM TO ESTIMATE
INTERVIEW – IF RESPONDENT SAYS THEY DON'T WATCH TV EVERYDAY, PLEASE ASK THEM TO ESTIMATE AN AVERAGE OVER A NUMBER OF DAYS.

1. Do not watch TV
2. Less often than an hour a day
3. Up to about an hour a day
4. 1-3 hours per day
5. 4-6 hours per day
6. Over 6 hours a day

7. NOT ON SHOWCARD Don't know

HARD CHECK: If codes 1-8 at TO12 (ie say they watch TV online/on demand) and code 1 at TO15.
Can I just check. You previously mentioned that you watched TV online or on demand, is that correct?
Yes – return to TO15 and amend code
No – return to TO12 and amend code

<u>CODING INSTRUCTION: if code 2 at TO7 and code 1 at TO15, screen out and close.</u>

SECTION B: Cross-platform preferences for different types of content

CPP1
ASK ALL
Thank you for answering the questions about how you watch television programmes and films. I would now like you to think not just about television, but other sources of information and entertainment too such as the radio, internet and newspapers.

Please tell me which of these you would use as a source for each of the following activities and past times.
ASK ALL
RANDOMISE STATEMENTS a-k

a) Which of these different types of media available to you (such as television, radio, internet etc.) would you say you **ever use** as a source for [insert statement] Multi code

Ask all more than 1 answer coded 1 – 10 at a)". If 1 answer only at a) then auto code b) . Skip b) if DK/None/No Interest

b) Which one of these is your **most important** source for this content SINGLECODE

Statements

A. Finding out news about what's happening in your region or locally
B. Finding out news about what is happening around the UK
C. Finding out what is happening around the world
D. Relaxing and entertainment
E. Your personal interest and pastimes
F. Knowledge about topics such as arts, science, nature, or history
G. Finding out news about what's happening in sports
H. Finding out about people with similar interests to your own
I. Finding out about people with values and lifestyles that are different to your own
J. Discovering new things
K. Finding out about different communities and cultural interests in different parts of the UK

SHOWCARD O (R)
Television

1. Scheduled TV or TV you have recorded yourself
2. On demand / catch up TV services (e.g. BBC iPlayer, 4OD, Demand 5, ITV Player)

Radio

3. Scheduled Radio or Radio you have recorded yourself
4. On demand / catch up radio services (e.g. BBC iPlayer)

The Internet

5. Websites provided by the BBC, ITV *Region text edit:* [STV/UTV] , Channel 4 or Channel 5
6. Social media (e.g. Facebook, twitter)
7. Websites of newspapers (e.g The Mail Online, Guardian.co.uk, Telegraph.co.uk)
8. Other websites

Other

9. Paper newspapers
10. Other (type in)

11. NOT ON SHOWCARD None of these
12. NOT ON SHOWCARD Don't know
13. NOT ON SHOWCARD Not interested in this type of content

SECTION C: Attitudes towards television and the internet

ASK ALL

Now I want to ask you about the role that television plays for you personally and for society in general.

AT1 To what extent do you agree or disagree with each of the following statements about television....
SHOWCARD P (R)
Single code

1. Agree strongly
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Disagree strongly
6. NOT ON SHOWCARD No opinion

ROTATE START-

a) As well as entertaining and informing people, television has an important social role to play
b) Television should help promote understanding and tolerance of different religions, cultures and lifestyles
c) Television's main role should be to provide entertainment rather than information or education
d) I have personally learned useful things from watching television
e) Television is very influential in shaping public opinion about political and other important issues
f) Television has an important role to play in encouraging people to be interested in different subjects, like arts, nature, sciences and history
g) It is important that television is available to everyone
h) Television has an important role in helping children and teenagers understand life in the UK
i) With so many channels now available, it's hard to find what I want
j) TV programmes sometimes change the way I think about things

ASK ALL
AT2
Now thinking about the internet, I am now going to ask you about the role that the internet plays for you personally and for society in general.
Again, to what extent do you agree or disagree with each of the following statements about the internet.....

SHOWCARD P (again)
Single code

1. Agree strongly
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Disagree strongly
6. NOT ON SHOWACRD No opinion

ROTATE START
a) As well as entertaining and informing people, the internet has an important social role to play
b) The internet should help promote understanding and tolerance of different religions, cultures and lifestyles
c) The internet's main role should be to provide entertainment rather than information or education
d) The internet is very influential in shaping public opinion about political and other important issues
e) The internet is a valuable source of information and learning
f) The internet has an important role to play in encouraging people to be interested in different subjects, like arts, nature, sciences and history
g) The internet has an important role to play in helping children and teenagers understand life in the UK
h) The internet is a valuable source of information and entertainment for children and teenagers
i) It is important that the internet is available to everyone
j) [Ask if personally use the internet - code 1 at TO7] With so many websites on the internet it's hard to find what I want
k) [Ask if personally use the internet - code 1 at TO7] I have personally learned useful things from the internet
l) [Ask if personally use the internet - code 1 at TO7] Websites sometimes change the way I think about things

SECTION D: Hard choices: content priorities

ASK ALL
Different people have different expectations – some people want to see more soaps and reality TV shows while others want more news and documentaries.

[England wording] I am now going to read out to you a number of different choices relating to the **five** main television channels and their services, BBC One and Two, ITV, Channel 4 and Channel 5.For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see.

[Scotland wording] I am now going to read out to you a number of different choices relating to the **five** main television channels and their services, BBC One and Two, STV, Channel 4 and Channel 5. For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see.

[Wales's wording] I am now going to read out to you a number of different choices relating to the **five** main television channels and their services, BBC One and Two, ITV Wales, Channel 4 and Channel 5 . For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see.

[NI wording] I am now going to read out to you a number of different choices relating to the **five** main television channels and their services, BBC One and Two, UTV, Channel 4 and Channel 5. For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see.

HC1 Would you most like to see [A] or [B]?
SHOWCARD Q (R)
Single code

a) A wide variety of different programme types, for example news, sports, documentaries, entertainment, religious, and the arts
b) More of the popular entertainment programmes that most people want to watch
c) NOT ON SHOWCARD No preference
d) NOT ON SHOWCARD Don't know

HC2 Would you most like to see [A] or [B]?
SHOWCARD R (R)
Single code

a) TV programmes that reflect the needs and concerns of specific communities within the UK (religious, regional or national, and ethnic)
b) TV programmes that reflect the needs and concerns of the UK as a whole
c) NOT ON SHOWCARD No preference
d) NOT ON SHOWCARD Don't know

HC3 Would you most like to see [A] or [B]?
SHOWCARD S (R)
Single code

a) The best TV programmes from the USA, Europe, Australia and other countries
b) The best of TV programmes made in the UK that reflect life in the UK
c) NOT ON SHOWCARD No preference
d) NOT ON SHOWCARD Don't know

HC4 Would you most like to see [A] or [B]?
SHOWCARD T (R)
Single code

a) Lots of original and experimental programme ideas
b) More of people's tried and tested favourites
c) NOT ON SHOWCARD No preference
d) NOT ON SHOWCARD Don't know

HC5 Would you most like to see [A] or [B]?
SHOWCARD U (R)
Single code

a) The five main channels BBC1, BBC2, *Region text edit:* [ITV/STV/UTV] , Channel 4 and Channel 5, should provide programmes that are targeted at mass audiences
b) The five main channels should provide a range of programmes that are targeted at different audience groups
c) NOT ON SHOWCARD No preference
d) NOT ON SHOWCARD Don't know

Hard choices: platforms
ASK ALL
Different people also have different expectations about where they should be able to watch different types of programmes.

I am now going to read out to you a number of different choices relating to where you can watch different types of programmes For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see.

HCP2 Would you most like to see [A] or [B]?
SHOWCARD W (R)
Single code

a) Only scheduled television, where you choose between programmes shown at any one time across a range of TV channels
b) Only on-demand services where you choose from a library of programmes that can be watched when you want
c) NOT ON SHOWCARD No preference
d) NOT ON SHOWCARD Don't know

NEW SCREEN
For each pair of the following pairs of choices, I would like you to tell me which one is the closest to what you would most like to see.

HCP4 Thinking about news content produced by the The BBC, *Region text edit:* [ITV/STV/UTV] , Channel 4 and Channel 5) would you most like to see [A] or [B],
SHOWCARD X (R) and READ OUT
Single code

a) News content only available on scheduled television
b) News content only available online on websites and apps with video clips, photos and text
c) NOT ON SHOWCARD No preference
d) NOT ON SHOWCARD Don't know

ASK ALL

CPP2: The next questions are about the types of programmes that you watch on scheduled television, recorded TV, catchup and on demand which are made in the UK and reflect life in the UK.
I'd now like you to look at this list of different types of television programmes. Please tell me which of these you watch at least once a month or more often.

SHOWCARD Y (R)
General and Entertainment
1. Comedy and sitcoms that reflect life in the UK
2. Soaps that reflect life in the UK
3. Drama that reflects life in the UK
4. Films that reflect life in the UK
5. UK Sport
6. UK Entertainment and contemporary music (such as talent shows or reality TV)

News & current affairs
7. News
8. [England-only code] News about and made for people in my region or my local area
   [Ireland-only code] News about and made for people in Northern Ireland
   [Wales-only code] News about and made for people in Wales
   [Scotland-only code] News about and made for people in Scotland
9. Current affairs programmes (e.g. Panorama, Dispatches, Question Time)
10. [England-only code] Current affairs about and made for people in my region
   [Ireland-only code] Current affairs about and made for people in Northern Ireland (e.g. The View, Spotlight, The Issue, The Stephen Nolan Show)
   [Wales-only code] Current affairs about and made for people in Wales (e.g. The Wales Report and Week In Week Out)
   [Scotland-only code] Current affairs about and made for people in Scotland (e.g. Scotland Tonight and Scotland 2014)

Factual
11. History, nature or science programmes
12. Other factual programmes including hobbies, leisure and consumer affairs (e.g. Masterchef, Traffic Cops, The Gadget Show, Grand Designs)
13. Educational programmes (e.g. University Challenge)

Culture / religion
14. Religious programmes
15. Arts and classical music (e.g. imagine, BBC last night at the proms)
16. Programmes that reflect the lives and concerns of different communities and cultural interests in different parts of the UK

Children
17. Children's programmes/channels that reflect life in the UK

Regional
18. England-only code] Aside from news and current affairs, other programmes about and made for people in my region
   [Ireland-only code] Aside from news and current affairs, other programmes about and made for people in Northern Ireland (e.g. Rare Breed, Lesser Spotted Ulster, City of Faith, Sports on Sunday)
   [Wales-only code] Aside from news and current affairs, other programmes about and made for people in Wales (e.g. X-Ray, Scrum V, Cefn Gwlad, Coast and Country)
   [Scotland-only code] Aside from news and current affairs, other programmes about and made for people in Scotland (e.g. Still Game, River City and Scottish Passport)

19. NOT ON CARD None of these
20. NOT ON CARD Don't know

SOFT CHECK: If [code 0 at QF and codes 2 or 3 at QI] and code 17 at CPP2
Can I just check, you mentioned earlier that you don't have any children living or regularly visiting your household, do you regularly watch children's programmes / channels?

3. Yes – continue.
4. No – please return to CPP2 and amend answer.

ASK FOR EACH CODE SELECTED AT CPP2
IF CODE 19 OR 20 AT CODE CPP2, SKIP TO GV1

CPP2b You said that you watch [**programme type at CPP2**]. Which channels or media services do you use to watch this type of programme at least once a month more often?

PROMPT: anything else.
PROMPT: for those using online / on demand services.
Multi code
SHOWCARD Z (R)

TV channels

1. Any of the 5 main channels (BBC1/BBC2/*Region text edit:* [ITV/STV/UTV] /Channel 4/Channel 5)
2. Any of the BBC's other channels (BBC3, BBC4, BBC News, BBC Parliament, CBBC, CBeebies)
3. Any of ITV/Channel 4/Channel 5's other channels (e.g. ITV2, ITV3, CiTV, E4, More4, 5*)
4. Any other channels (e.g. Dave, Sky One, Sky Sports, Sky Movies)

Media services online

5. iPlayer, 4oD, ITV Player, [*Region text edit:* Scotland: STV Player/Northern Ireland: UTV Player], Demand Five
6. Other on-demand services (e.g. Sky on demand, Sky Go, Virgin on demand, Netflix, Amazon Prime Instant)

7. NOT ON SHOWCARD Don't know

INTERVIEWER INSTRUCTION: ITV WILL NEED CHANGING THROUGHOUT THE QUESTIONNAIRE TO: UTV IN NORTHERN IRELAND, STV in SCOTLAND

SECTION E: General views about programme types

Thank you for all your opinions so far. In this final section of the questionnaire, we would like to ask your views specifically about what types of programmes are important to you personally and to your family .

ASK ALL

GV1 From the following list, which are the five programme types you consider to be most valuable to you and your family personally on the five main TV channels? That is BBC One, and BBC Two, *Region text edit:* [ITV/STV/UTV] , Channel 4 and Channel 5. You can pick up to five that are most important to you.

SHOWCARD

Multi code up to 5

GV2 The previous question asked you which programme types were important to you personally. Now I would like you to think about how important these programmes are for the good of society as a whole. For example, you may personally think soaps are not important, but could still think they are important to society as a useful way of airing debates about current issues. So looking at the same list of programme types, please tell me which five you think are the most important for these five main channels to provide for the good of society as whole. Again, you can pick up to five that you think are the most important.

SHOWCARD AA (R)

Multi code up to 5

SHOWCARD- NEEDS TO MATCH CPP2

General and Entertainment

1 Comedy and sitcoms that reflect life in the UK
2.Soaps that reflect life in the UK
3 Drama that reflects life in the UK
4.Films that reflects life in the UK
5.UK Sport
6.UK Entertainment and contemporary music (e.g. talent shows or reality TV)

News & current affairs

7. News
8. [England-only code] News about and made for people in my region or my local area
[Ireland-only code] News about and made for people in Northern Ireland
[Wales-only code] News about and made for people in Wales
[Scotland-only code] News about and made for people in Scotland
9. Current affairs programmes (e.g. Panorama, Dispatches, Question Time)
10. [England-only code] Current affairs about and made for people in my region
[Ireland-only code] Current affairs about and made for people in Northern Ireland (e.g. The View, Spotlight, The Issue, The Stephen Nolan Show,)
[Wales-only code] Current affairs about and made for people in Wales (e.g. The Wales Report and Week In Week Out)
[Scotland-only code] Current affairs about and made for people in Scotland (e.g. Scotland Tonight and Scotland 2014)

Factual

11. History, nature or science programmes
12. Other factual programmes including hobbies, leisure and consumer affairs (e.g. Masterchef, Traffic Cops, The Gadget Show, Grand Designs)
13. Educational programmes (e.g. University Challenge)

Culture / religion

14. Religious programmes
15. Arts and classical music (e.g. imagine, BBC last night at the proms)
16. Programmes that reflect the lives and concerns of different communities and cultural interests in different parts of the UK

Children

17. Children's programmes/channels that reflect life in the UK

Regional

18. England-only code] Aside from news and current affairs, other programmes about and made for people in my region
    [Ireland-only code] Aside from news and current affairs, other programmes about and made for people in Northern Ireland (e.g. Rare Breed, Lesser Spotted Ulster, City of Faith, Sports on Sunday)
    [Wales-only code] Aside from news and current affairs, other programmes about and made for people in Wales (e.g. X-Ray, Scrum V, Cefn Gwlad, Coast and Country)
    [Scotland-only code] Aside from news and current affairs, other programmes about and made for people in Scotland (e.g. Still Game, River City and Scottish Passport)

19 . NOT ON CARD None of these
20. NOT ON CARD Don't know

Q. GVDigi [ASK ALL]

And now thinking more broadly about programming that reflects life in the UK, how important is it to **you personally** that the BBC, [regional text: ITV/STV/UTV], Channel 4 and Channel 5 provide:

a) Programmes that show different parts of the UK, including England, Northern Ireland, Scotland and Wales.

Showcard BB (R)

Very important
Quite important
Neither/nor
Quite unimportant
Very unimportant
Don't know

ASK ALL WHO HAVE HIGH DEFINITION (HD) TV AT TO2b
GV5

A large number of television channels can also be viewed in high definition (known as 'HD'). The number of HD channels available to an individual also depends on which supplier they use.

How important, if at all, is it to you personally that High Definition channels are provided?
SHOWCARD BB (R)

Very important
Quite important
Neither/nor
Quite unimportant
Very unimportant
Don't know

GV6
I'd now like to ask you some questions about the other services that the BBC, *Region text edit:* [ITV/STV/UTV] , Channel 4 and Channel 5 provide. How important, if at all, is it to you personally that each of the following types of service are provided?
READ OUT and RANDOMISE ORDER
Single code for each.
SHOWCARD BB (again)

a) Catch up/on demand services - BBC iPlayer/ITV Player/ [*Region text edit:Scotland: STV Player/Northern Ireland: UTV Player* /4oD/Demand 5
b) [ask among parents/carers only: code 1 at QH or code1 at QI]] Catch up/on demand services CBBC or CBeebies iPlayer, Milkshake]
c) Websites provided by broadcasters – for example bbc.co.uk (inc. BBC News, BBC Sport, BBC Arts, BBC Food); www.itv.com (inc. ITV News), www.channel4.com (Channel 4 News, E4.com) and www.channel5.com
d) Apps that can be downloaded to your smartphone or tablet, made for specific TV programmes or channels

1. Very important
2. Quite important
3. Neither/nor
4. Quite unimportant
5. Very unimportant
6. Don't know

GV7
And thinking about how you can use catch up/on demand and website services, how important is it to you that these different services are widely available on different devices, other than TV (e.g. smartphones, tablets and laptops)?
SHOWCARD BB (again)
Single code

1. Very important
2. Quite important
3. Neither/nor
4. Quite unimportant
5. Very unimportant
6. Don't know

ASK ALL WHO HAVE A CHILD IN HOUSEHOLD OR YOUNG FAMILY WHO VISIT REGULARLY (QH OR QI CODE 1)
GV8
I'd now like you to think about children's programmes and services.
To what extent do you agree or disagree the following statements about children's programmes and services?
SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS AND REVERSE ORDER
SHOWCARD CC (R)

1. Agree strongly
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Disagree strongly
6. NOT ON SHOWCARD Don't know

A. It is important that TV channels other than the BBC's CBeebies and CBBC provide children's programmes that reflect life in the UK.
B. Catch up and on demand services like Milkshake or CBBC or CBeebies iplayer are a better way of providing children's programmes than TV channels.
C. Websites are a better way of providing content for children than TV channels.

NEW SCREEN
Thank you very much for your time, that is the end of the survey, finally, I'd like to ask a few short questions to help us understand how different groups of people feel about the things we have discussed today. This is the last section of the questionnaire.

QJ Which of the following best describes your home right now. Your home is…
READ OUT

1. Being bought on a mortgage
2. Owned outright by the household
3. Rented from the Local Authority / Housing Association / Trust
4. Rented from a private landlord
5. Other
6. DO NOT READ Don't know

QK .

What is the occupation of the Chief Income Earner in your household, that is the person with the largest income whether from employment, pension, state benefits, investments, or any other source?
PROBE FOR:

Position / rank / grade
Industry / type of company
Qualifications / degree/ apprenticeship
Number of staff responsible for

QKA INTERVIEWER CODE SOCIAL GRADE

A
B
C1
C2
D

E
Ask all
QL Do you or anyone in your household have any long-term illness, health problem or disability which limits your daily activities or the work you can do?

Multi code options 1 or 2; single code options 3 or 4

Yes me
Yes someone in my household
No
Don't know / ref

Ask for Wales, NI and Scotland only, including the relevant code for the nation as indicated below
QM Do you speak or have an understanding of...?
Single code Wales / Scotland; Multi code possible for NI

INTERVIEWER CODE LANGUAGE IF YES
Northern Ireland only Irish
Northern Ireland Ulster Scots
Wales only Welsh
Scotland only Gaelic
No
Don't know

THANK RESPONDENT AND CLOSE

[End of survey]

Quality check info and Interviewer declaration

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The Social Research Institute works closely with national government, local public services and the not-for-profit
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