



The Future of Television Funding

Findings of a research study looking at attitudes towards existing and potential new funding mechanisms

Research conducted by Human Capital on behalf of Ofcom

September 2005

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Foreword

This independent research was commissioned by Ofcom from Human Capital to assist in the preparation of three consultations broadly concerned with the future funding of television programming.

The research was primarily aimed at answering three questions:

- What do viewers think of the different ways commercial television is funded at the moment?
- What do they think about some of the ways that are not allowed today, but may be possible options for the future?
- Are viewers aware of the regulations that are currently in place? How do they feel about them?

The consultations are designed to consider whether three particular forms of funding might have a role to play in the future of television programmes:

- Product placement
- Channel sponsorship
- Appeals for donations

The first two may also have a role to play in the future funding of radio (appeals for donations are already permitted on radio).

The research was qualitative in nature. This means it explored in some depth the views of respondents in order to give directional steers to Ofcom. As it is not a quantitative study, the results cannot be extrapolated to represent the views of the wider population. It contributed to the policy considerations but is not in itself conclusive about how the wider public feel about the various funding mechanisms that were considered

The research conclusions were part of the information taken into account by Ofcom in preparing its consultation documents, and will also inform any final decisions taken by Ofcom in these areas.

Section 1

Executive Summary

- The research on which this report is based was commissioned by Ofcom to investigate the attitudes of television viewers in the UK towards various television funding mechanisms.
- The funding options tested were divided into two sections:

Current funding mechanisms	Potential funding mechanisms
Traditional television advertising	More minutes of traditional television advertising (an average of 9 minutes rather than 7 minutes on terrestrial commercial channels)
Programme sponsorship	Background product placement (defined as relevant to the programme and subtle)
Prop placement	Noticeable product placement (defined as noticeable and not necessarily relevant to the programme)
Pay interactivity	Script product placement (defined as where programme scripts are built around products)
Pay-per-view	Programmes made by advertisers
	Channels that are funded or sponsored by advertisers

- The research was primarily aimed at answering three questions:
 - What do viewers think of the different ways that television is funded at the moment?
 - What do they think about some other ways that are not allowed today, but may be possible options for the future?
 - Are viewers aware of the regulations in this area that are currently in place? How do they feel about them?
- Six deliberative workshops were conducted in locations across England, Scotland, Wales and Northern Ireland during June 2005. Each group lasted four hours, and a total of 87 people took part. The results are summarised in the paragraphs below.

What do viewers think of the funding mechanisms in place today?

- Programme sponsorship was the most popular of today's funding mechanisms among participants when considered alongside other funding options.
- Advertising is accepted – though people did not like the idea of more being shown on television.

- While participants felt that adverts have become slightly more intrusive over the last five years, they also felt the quality of television programmes has improved slightly.
- Participants liked the realism that prop placement can give to programmes and found nothing to object to in this mechanism.
- Pay interactivity was the most polarising of existing funding mechanisms discussed. Middle-aged parents with children at home were the most disapproving.
- Participants worried that pay-per-view could lead to them “paying twice” for content – and possibly paying for content which is currently available free-to-view.
- Many of the issues that participants raised in relation to the different funding methods were related to children – both in terms of protecting children themselves, and also protecting parents from the influence of advertising on children.
- News & current affairs, religion and children’s content were seen by respondents as ‘no-go areas’ for commercial activity. In contrast, sport was widely seen as the most commercial genre, followed by film, entertainment and drama. Attitudes towards sport may not be directly related to broadcasting but also include player/team sponsorship, tournament sponsorship, etc.
- Little differentiation was made between the terrestrial commercial channels in terms of the appropriateness of different mechanisms, though on the whole they were seen as less appropriate for the mechanisms than the multichannel services.
- Mixed entertainment digital channels were seen as the most appropriate channels for pay-per-view and pay interactivity services.
- A substantial minority of participants thought that product placement already takes place. Examples cited include Cadbury’s chocolate in *Coronation Street*, various car manufacturers in James Bond films, eBay and Apple in *Sex and the City*, and car manufacturers in *Top Gear*.

What do viewers think about potential future funding mechanisms?

- When discussing future funding mechanisms with participants, product placement was generally well received when it enhanced the realism of a programme, is relevant and is not too prominent. Background product placement was the most popular when ranked against the other means of funding.
- Participants differed in their view of what is and is not prominent; they also recognised that achieving consensus could be difficult in practice.

- Participants did not like the idea of being sold to by stealth – they preferred transparent disclosure of commercial arrangements.
- Direct appeals were not liked by the majority of respondents.
- Respondents had concerns about advertiser-funded programmes because of fears about advertisers having too much editorial control.
- As indicated earlier, participants were not comfortable with the prospect of more adverts on television.
- Channel sponsorship was seen as acceptable as long as it did not imply a channel that carried only advertiser-funded programming.
- Most people supported the principles that underpin the current regulations. A minority had a particularly “purist” attitude to the integrity of programmes – these people tended to subscribe to the public service tradition of television and support the status quo.
- Participants were more inclined to relax their attitudes towards the regulations when faced with a trade-off¹ – especially with regards to more spot advertising. However, they were sceptical about the premise that there could be a funding crisis in television.
- The final rankings suggest that some potential new funding mechanisms (especially a limited form of product placement and possibly more minutes of advertising) could be preferred to some of today’s mechanisms (especially pay interactivity and pay-per-view).

¹ Respondents were asked to consider each funding mechanism in the context of a world in the future where money earned from traditional advertising was under pressure.

Section 2

Objectives and methodology

Background

Ofcom has a responsibility to ensure a wide range of television and radio services of high quality and wide appeal are available throughout the UK.

Discussions about the apparent threat to the traditional spot advertising funding model of commercial television (from PVRs and the potential for delivery of audiovisual content via broadband internet) prompted a need to investigate and evaluate new potential funding sources and, if necessary, recommend regulatory change to allow these to develop.

Objectives

The research on which this report is based was therefore commissioned to investigate the attitudes of television viewers in the UK towards various television funding mechanisms. The research was primarily aimed at answering three questions:

- What do viewers think of the different ways that television is currently funded? Five current funding mechanisms were tested:
 - Traditional television advertising
 - Programme sponsorship
 - Prop placement
 - Pay interactivity
 - Pay-per-view
- What do viewers think about other potential forms of funding that are not allowed today, but might possibly be allowed in the future? Seven potential new funding mechanisms were tested:
 - More minutes of traditional television advertising (an average of 9 minutes rather than 7 minutes on terrestrial commercial channels)
 - Background product placement (defined as relevant to the programme and subtle)
 - Noticeable product placement (defined as noticeable and not necessarily relevant to the programme)
 - Script product placement (defined as where programme scripts are built around products)
 - Programmes made by advertisers
 - Channels that are funded or sponsored by advertisers

- Are viewers aware of the regulations in this area that are currently in place? How do they feel about them? Specifically, attitudes towards four broadcasting principles were tested, and preconceptions surrounding current regulations on product placement were discussed.

The research also investigated how attitudes to the different funding types vary across different programme genres, and different channel types.

Methodology

Independent media strategy and research agency, Human Capital, was commissioned to conduct this research on behalf of Ofcom.

Six deliberative workshops were carried out over two weeks in June 2005. These were held across the UK in Manchester, Edinburgh, London, Belfast, Birmingham and Cardiff. Each group lasted four hours, and a total of 87 people took part.

Each group comprised of between 13 and 15 respondents, and included respondents of different ages, television viewing platforms, socio-economic groupings and life stages. Each four-hour discussion was chaired by two moderators. The sample structure can be seen in Figure 1 below. Five Sky+ users were included in the sample.

Figure 1. Sample structure by gender, age, SEG and television viewing platform (unweighted frequencies)

	Gender		Age				SEG		Television Platform		
	Male	Female	Under 30	31-40 years	41-50 years	51 and over	ABC1	C2DE	Terr-estrial only	Free-view / FreeSat	Multi-channel
Manchester	6	8		10	4		2	12	5	3	6
Birmingham	6	9		2	9	4	7	8	4	6	5
Belfast	6	9	5	6	4		8	7	6	3	6
Edinburgh	7	8			12	3	6	9	6	3	6
Cardiff	8	7			4	11	11	4	4	6	5
London	7	6	12	1			7	6	4	3	6
Total	40	47	17	19	33	18	41	46	29	24	34

Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on **number of respondents**.

A short show reel was also used as stimulus during the sessions. This was a collection of clips from various films and television programmes illustrating different types of product placement, and was shown to respondents after an initial discussion on product placement had taken place. The clips shown to respondents were:

- *Sex and the City* – a salesperson in a book store extols the merits of Weight Watchers to *Miranda* as she attempts to buy a competing diet plan book

- *Castaway* – an extract from the start of the film showing the character played by Tom Hanks wearing a FedEx cap, with a FedEx truck also visible in the background
- *Tomorrow Never Dies* – a clip showing at least two clear examples of product placement: James Bond is introduced to his new BMW 750 and his Ericsson mobile phone
- *Minority Report* – The character played by Tom Cruise looks for clothes in a futuristic, hologram-staffed GAP store.

Section 3

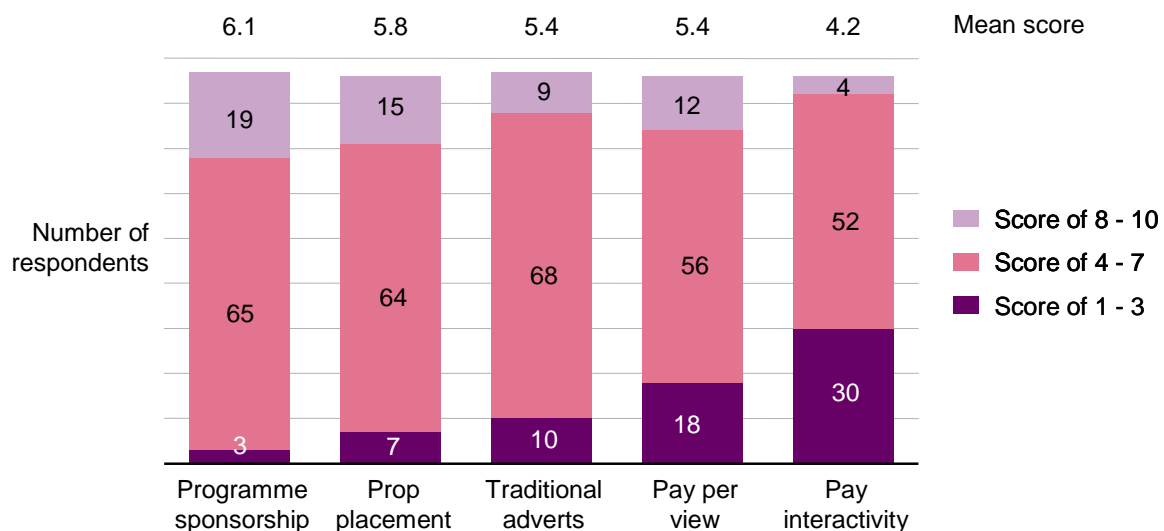
Television funding today

The research groups were each divided into two sessions: the first discussing television funding mechanisms that currently exist in the UK and the second discussing funding mechanisms that could be considered in the future. This section of the report presents the findings relating to participants attitudes towards today's funding mechanisms.

Approval scores

Respondents were asked in the questionnaire to give their strength of approval to five different funding mechanisms that are currently used in the UK. Figure 2 shows the range of approval scores, as well as the mean scores, indicated for each mechanism.

Figure 2. Approval scores for current funding mechanisms (1 = strong disapproval, 10 = strong approval)²



Overall, based on the mean scores, programme sponsorship was the most popular of today's funding mechanisms tested in the groups. Pay interactivity scored lowest, driven by a group of strong objectors. Each of the funding types is discussed in more detail below.

Younger people (i.e. those under 40) appeared to be less approving of traditional spot advertising and programme sponsorship, when compared to older people (i.e. those over 40). It is interesting to note that of the five types of funding we tested in this section, these two are the only ones which directly interrupt the flow of programmes.

² Base: 86 / 87 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

Advertising

Overall, traditional spot advertising is tolerated by most people. It was seen as an integral part of the television world which was not necessarily liked but is mostly accepted.

Some participants actively liked the idea of advertising breaks because they create an opportunity to do something else – tasks such as making a cup of tea were mentioned. Some respondents reported that they sometimes do not like watching BBC channels for this reason.

Some adverts were seen as good entertainment in themselves. The adverts that were mentioned by respondents were often humorous (e.g. *John Smiths*), but other memorable adverts such as Honda's "Cog" were also mentioned.

"Advertising can be exhausting and even painful to watch; however, the TV commercial can exist as a format for some creative work. I am caught between extremes"

– Male, 21, London

Some people liked the fact that advertising gives them the opportunity to find out about new products that they might otherwise not have heard about. This can be a positive thing, as long as the adverts are relevant to them.

"Advertising is part of TV's informative function"

– Male, 27, Belfast

Negative comments about adverts were generally related to the frequency of the breaks more than the length of the breaks themselves. Respondents criticised the repetition of adverts, particularly in the multichannel environment. Commercials for mobile telephone ringtones, insurance and personal finance were particularly criticised in this regard.

"It feels like adverts are becoming more frequent per hour, breaking the impact of the programme up"

– Male, 46, Edinburgh

"They have to exist to fund TV, but some ad breaks last too long and some programmes are cut up by too many breaks"

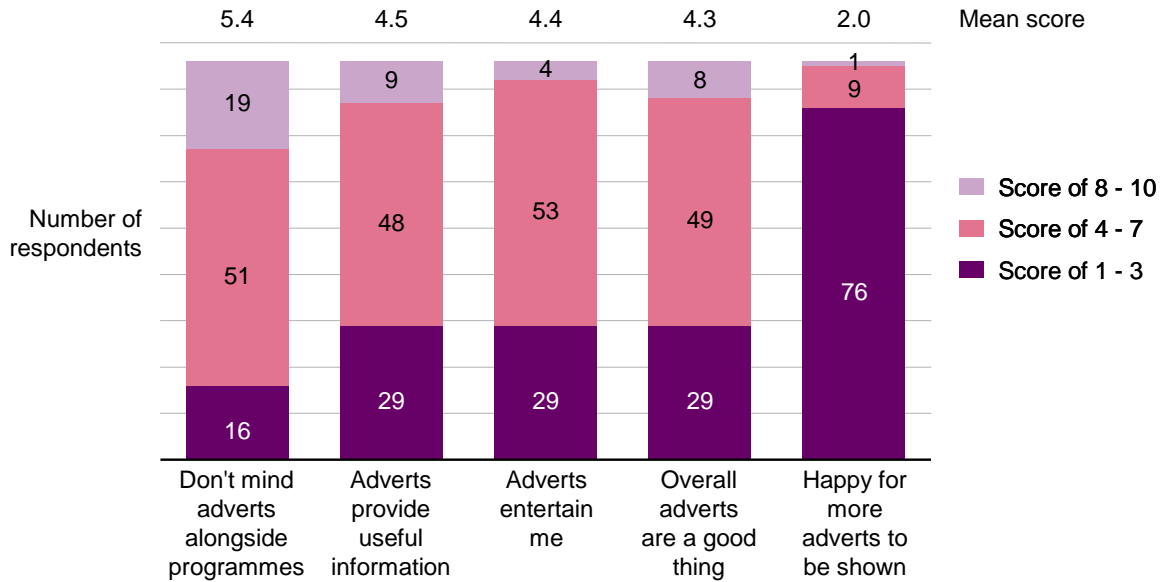
– Male, 25, London

There was widespread concern about the impact on children of advertising. Many respondents felt that children needed to be protected from heavily targeted advertising, especially at a young age when they are particularly vulnerable.

The impact on children of advertising was also an issue for parents in relation to "pester power". Many expressed the concern that advertising which was heavily targeted at children put undue pressure on their parents to spend money in order to satisfy their children's demands. This was a particular worry in the run-up to Christmas.

Although participants were accepting of advertising at the moment, there was resistance to the idea of more ads being shown, as Figure 3 shows.

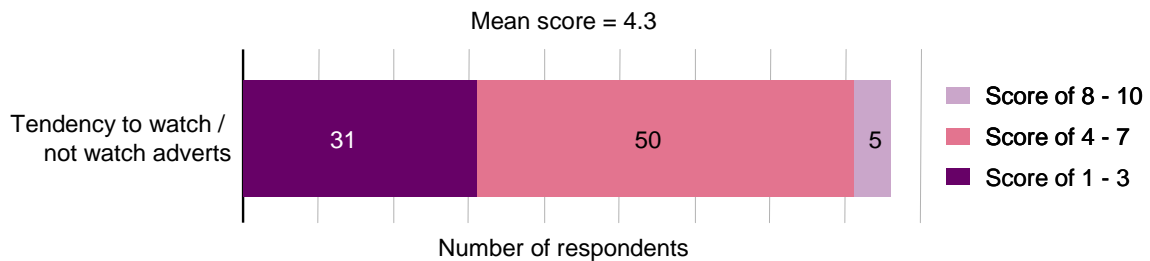
Figure 3. Strength of agreement with statements about advertising (1 = strong disagreement, 10 = strong agreement)³



Heavy television viewers⁴ were particularly negative about adverts, possibly due to their high exposure to them.

Figure 4 shows that participants were slightly more likely to claim skipping through rather than to watch adverts. When they do skip, they are most likely to switch to another channel, though many use the opportunity to make a drink, talk to others in the room, etc. All five respondents with Sky+ said that they skipped ads using the Sky+ technology.

Figure 4. Tendency to watch or not watch adverts (1 = never watch, 10 = always watch)⁵



Overall, participants thought that adverts are now slightly more intrusive than they were five years ago. Respondents were left to interpret the word “intrusive” as they saw fit.

³ Base: 86 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

⁴ Heavy viewers are defined as those who claimed their household watched at least 10 hours of television per day compared to the sample average of 6.6 hours.

⁵ Base: 86 respondents.

When probed about their interpretation, respondents talked about intrusiveness in terms of length and frequency of advert breaks, volume of adverts in relation to the rest of the programme, and also the tendency for advert breaks to be synchronised across different television channels, particularly in the multichannel environment.

However, this feeling of increased intrusiveness of advertising appears not to have tainted viewers' perceptions of the quality of television programmes, which they believe to have improved slightly over the same period. These results are shown in Figure 5. Though asked directly about programme quality, many respondents included a feeling of increased programme variety and choice within their answers. This was particularly true for those with multichannel television.

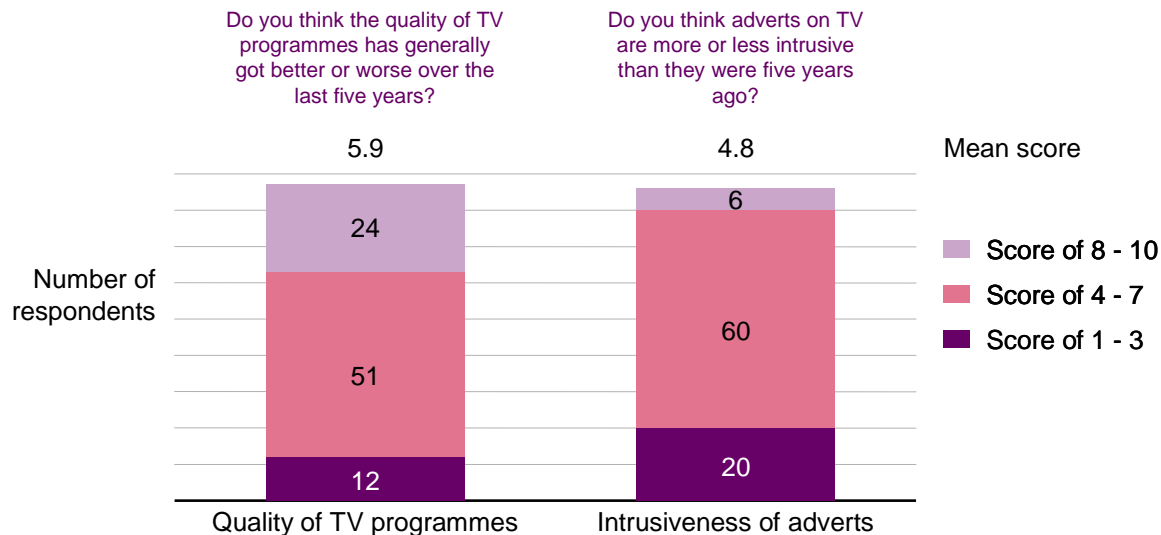
“The quality has definitely got better – more creative and daring programmes are being broadcasted”

– Male, 21. London

“TV is improving all the time and the variety we have as viewers is excellent”

– Male, 46, Manchester

Figure 5. Perceived change in the quality of television and the intrusiveness of adverts over the last five years
(Quality of television: 1 = worse, 10 = better;
Intrusiveness of adverts: 1 = more intrusive, 10 = less intrusive)⁶



The discussions about the quality of television programmes were often dominated by reality television. Respondents were strongly divided over the subject, and many defined their viewing habits on the basis of whether or not they were reality television fans. Those who felt that the quality of programmes had fallen over the last five years invariably used reality TV to illustrate their point.

⁶ Base: 86 / 87 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

“The craze to find the most outrageous reality TV show between the terrestrial channels has lowered the quality of mainstream television”

– Male, 39, Manchester

Programme sponsorship

There was significant support for programme sponsorship during the discussions and no real downsides were mentioned in the groups. This was particularly the case in comparison to traditional spot advertising. Sponsorship was seen to be less intrusive than traditional spot advertising, as the advertiser is seen to be making an effort to be relevant to the programme itself.

“It’s not too intrusive, a good way to raise revenue – depending on the programme”

– Male, 40, Birmingham

Awareness of programme sponsors was strong, perhaps due to the fact that many programmes that are currently sponsored tend to be mainstream or popular programmes or the volume of sponsorship relative to traditional spot advertising. There were several mentions for Cadbury’s (*Coronation Street*), Talk Talk (*Big Brother*), Bailey’s (*Sex and the City*), Domino’s pizza (*Simpsons*) and Jacob’s Creek (*Friends*) amongst others.

The link between sponsor and programme can be very strong in viewers’ minds, and one participant described how they took the link very literally, consuming the product during the programme:

“For a while me and a group of friends used to get together on Friday nights, buy a bottle of Bailey’s and watch Sex and the City together. It just seemed like the right thing to do!”

– Female, 33, Birmingham

The discussions suggested that the high awareness of sponsorship may also be linked to the fact that sponsorship messages acted as a sign for some respondents that the programme is about to resume if they are fast-forwarding through the commercials or are doing other things such as making a cup of tea in the next room.

Participants also demonstrated positive feelings towards the sponsors because most think that the sponsors put money directly into the production of the programme. They also assumed that sponsors do this without actually being involved in the editorial content of the programme itself, which to them felt like an ideal situation. A smaller number of respondents did think that programme sponsors were involved with the content of the programme – for example, that Cadbury were able to place their chocolate in the shop in *Coronation Street* by virtue of being a sponsor.

“I don’t really have an objection with sponsors paying for a programme as long as it doesn’t affect the quality”

– Male, 50, Edinburgh

Prop placement

Many participants were either unfamiliar with the concept of prop placement or were not always aware when it was happening. They rarely thought about the processes that happened behind the scenes in order to bring a car, for example, into a programme.

When the concept was explained to participants, they were generally comfortable with the idea. People understood that certain props need to be used in order to make television programmes, and the existing process of prop placement seems to be a reasonable way to make this happen.

People were most positive about prop placement when they were talking about its ability to add realism to a programme. They believed that brands are an intrinsic part of our world, and that there is value in reflecting them in programming.

“I feel that prop placement makes some programmes feel real if you see products that you’re used to”

– Female, 38, Manchester

Making the brands visible was not a problem for most participants, as long as it is done in a natural way. People felt that over-enthusiastic efforts to hide brand names could be just as jarring as giving undue prominence to the brands. For example, many said it felt right that the shop in *Coronation Street* should be selling real brands of chocolate, rather than fictional brands, as that is simply reflecting reality.

“You couldn’t have someone walk into a pub and ask for a ‘pint of non-specific, please’ could you?”

– Male, 25, London

It is seen as important, however, that where brands are visible they are also balanced and that one brand is not given an unrepresentative share of the market. For example, there should be a mix of brands of chocolate in the shop in *Coronation Street*, not just one. Again, this helps to add to the feeling of reality in the programme.

Pay-per-view

There were two schools of thought in relation to pay-per-view among the group participants.

On one hand, participants were worried that cable and satellite broadcasters could use pay-per-view to slice content into smaller and smaller pieces in order to charge subscribers more fees. There was a feeling that if, for example, you have paid for a movie channel package then you should get all the movies and that, with pay-per-view, subscribers end up paying twice. On balance, this was the dominant point of view.

“Having paid for a subscription, you should not have to pay extra to view any programme”

– Female, 64, Cardiff

“If you already pay for Sky, why should you have to pay more and more?”

– Female, 32, Belfast

On the other hand, some participants felt that pay-per-view allows events to be shown that would not otherwise be screened and that, since this is optional, it is difficult to

object to it. Those that watch pay-per-view sports like boxing are most likely to subscribe to this point of view.

“It’s a means of renting a movie without going to the video shop, as well as a means of showing certain sports events that would not otherwise be screened”

– Male, 21, London

Respondents were most worried about the idea that programmes which are currently available to them for free could one day be charged on a pay-per-view basis. The idea of, for example, televised football matches being sold in this way felt wrong to participants. In contrast, the idea of currently unavailable programmes being made available through PPV, as opposed to not being available at all, was received more warmly. However, people felt it was difficult to draw the line between new programmes that would normally be delivered for free, and new programmes that would not normally make it onto television.

Pay interactivity

In this section, pay interactivity included discussions on telephone calls, SMS text messages and ‘red button’ activity.

Pay interactivity was the most polarising of today’s funding mechanisms, attracting a group of strong objectors.

Those that approved of pay interactivity liked the fact that it allows viewers to become involved with the programme, and therefore raise their enjoyment. Acceptance was greatest when the interactivity is clearly justified editorially. For them, being able to affect the outcome of shows like *Big Brother* by voting, for example, adds to the overall experience.

“Everyone should have the opportunity to contribute to the show if they want to”

– Female, 25, London

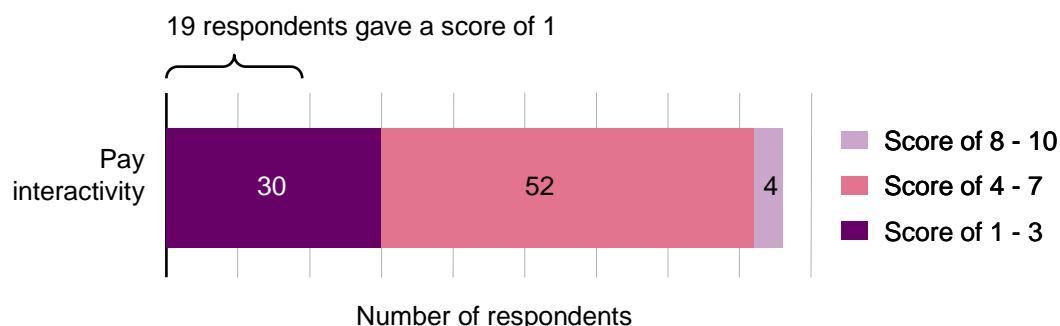
Others were less enthusiastic but felt that overall it was not a great problem since viewers can choose whether or not they wish to take part. If it generates extra money for the programme, it is acceptable – telephone calls raising prize money for *Who Wants to Be a Millionaire?* Was an example cited in the groups.

“I wouldn’t ever do it myself, but if other people want to it’s up to them”

– Female, 50, Cardiff

However, a large proportion of participants aired strong objections to interactivity. 19 people gave the lowest possible score for their approval of interactivity, as shown in Figure 6. For them, interactivity can be annoying, expensive, exploitative or all three.

Figure 6. Range of approval scores for pay interactivity (1 = strong disapproval, 10 = strong approval)⁷



Those respondents that strongly disliked interactivity tended to be middle-aged parents with children at home.

Objectors pointed to competition hotlines which they believe are expensive and do not offer a high chance of winning. There was some concern that the high prices involved are not always made clear enough. They also worried that this type of mechanism preys on the naïve and the young, who can become addicted.

“It’s just another way of treating us like suckers and most people acting like them”

– Male, 30, London

There was particular concern that children can be exploited and can run up high telephone bills. Most respondents were unaware of technologies that exist to allow parents to control the access that their children have to premium rate telephone numbers. Only one respondent mentioned this technology over the course of the research, though they were not prompted to do so.

There was also some worry that voting is ‘getting a bit boring’ and that television companies need to develop new interactive offerings.

Attitudes to funding types on different television genres

Participants had very different feelings about how appropriate the different funding mechanisms are on different kinds of programmes. Figure 7 shows the average appropriateness scores (amongst the relatively small sample of between 81 and 87 respondents) for each of the funding mechanisms on 11 different genres.

Overall, Sport was the only genre considered suitable for all of the funding types. At the other end of the spectrum, Religion, News & Current Affairs and Children’s programmes were considered inappropriate genres for the different mechanisms⁸.

⁷ Base: 86 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

⁸ The category of “consumer programmes” was also included in the questionnaire along with the other genres discussed here. However, it caused some confusion amongst respondents, particularly in relation to product placement, and has been omitted from the quantitative results throughout this document.

Figure 7. Mean scores for appropriateness by genre and funding mechanism (1 = not at all appropriate, 10 = very appropriate)
(Base: 81-87 respondents across different funding mechanisms and genres)⁹

	Pay Interactivity	Pay per View	Prop Placement	Sponsorship
Sport	5.7	7.3	6.9	7.7
Films	2.9	6.9	6.9	6.2
UK entertainment	5.8	3.5	6.1	6.3
US / other imported drama and entertainment	3.6	4.2	6.2	5.8
UK drama	2.6	3.6	6.4	6.2
Arts	2.8	2.7	4.1	4.8
Factual	2.3	2.4	3.2	4.6
Education	2.4	1.6	3.1	3.9
Children's Programming	1.7	1.9	3.0	3.0
News and Current Affairs	2.3	1.3	1.8	2.5
Religious programming	1.7	1.6	2.0	2.4

■ Over 6
 ■ 3 to 6
 ■ 3 and under

Sport

This genre was widely seen and accepted as the most commercial genre. The prominence of sponsors and advertising involved in live sport added to this effect – from shirt sponsorship in live football to advertising hoardings round the pitch, to the billing of the constructors in Formula 1 racing. This was true despite the fact that the money typically does not flow to the broadcaster or producer of the programme. Sport therefore felt like the most natural home for almost all of the funding types.

Film, drama and entertainment

These genres were generally seen as appropriate for commercial activity, particularly film. As with sport, film was seen as appropriate for commercialisation at least partly because viewers have experienced sponsorship and product placement in film already and are used to the idea.

Participants felt that drama and entertainment should not be made available through PPV, as it should be free to everyone. No significant differences emerged between the appropriateness of the various mechanisms on UK and US drama and entertainment,

⁹ Base: 81-87 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged.

despite the perception that US programming was more likely to be commercial at the moment.

Arts

People felt that this genre does not lend itself well to commercialisation. It was felt to be a serious and worthy genre, which in their opinions seemed to clash with the idea of commercialisation.

Factual

Compared to the “fictional” genres, factual programmes were seen as less appropriate territory for commercialisation. This seemed to support the general trend that the more fictional and entertainment-orientated the programme, the more appropriate it is for commercialisation.

Children’s and Education

Some respondents felt that children needed protecting from commercialisation, and that parents needed protecting from “pester power”. In general, this translated to low appropriateness scores for all the different funding mechanisms on children’s programming. Pay interactivity scored particularly low, reflecting the concerns discussed on page 17. Education was generally referred to in conjunction with the children’s genre.

“Children shouldn’t be the targets of advertising and sponsorship. Entertainment only, in my opinion”

– Male, 25, London

On the other hand, some participants thought that appropriate brands could play a more positive role – for example, the *Early Learning Centre* could make a good sponsor for children’s programmes. They recognised the subjectivity of this judgement, however, and agree that it would be difficult to judge whether or not a potential sponsor was appropriate.

Prop placement was generally disapproved of in relation to children’s programming, though some people did not see any problems with this. Examples such as “sticky-back plastic” in *Blue Peter* were mentioned, which some respondents felt was unnatural and that it should just be called Sellotape because “that’s what everyone calls it in real life”. However, the majority seemed to feel that it was right to keep brand names out of children’s programmes where possible.

News and Current Affairs

These genres were commonly understood to rely on impartiality and therefore commercialisation was not thought to be appropriate. Some viewers expressed some concern that any brands that were linked to these kinds of programmes might be given special treatment if they became part of the news.

“Programmes that should be objective and independent shouldn’t have prop placements”

– Male, 52, Birmingham

“News and current affairs should be sponsorship free”

– Male, 46, Birmingham

Religion

Respondents had very strong views about the appropriateness of commercialism on religious programming, even though the majority did not think this type of programming was particularly important to them personally or to society as a whole. It was felt to be inappropriate to involve any of the funding mechanisms with religion, particularly pay-per-view, which would go against the principle that religion should be freely available to those who want it.

Importance of television genres

Respondents were asked to score genres based on the importance of each to them personally and others in their household. Overall, people felt that news & current affairs was the genre that was most important for themselves and the others in their households. Sport was also seen as very important for a lot of people – 30 respondents out of 87 gave sport a maximum score of 10. At the other end of the scale, religious and arts programming were seen as the least personally important. Figure 8 shows the range of importance scores for each genre.

Figure 8. Importance of television genres to respondents and their households (1 = not at all important, 10 = very important)¹⁰

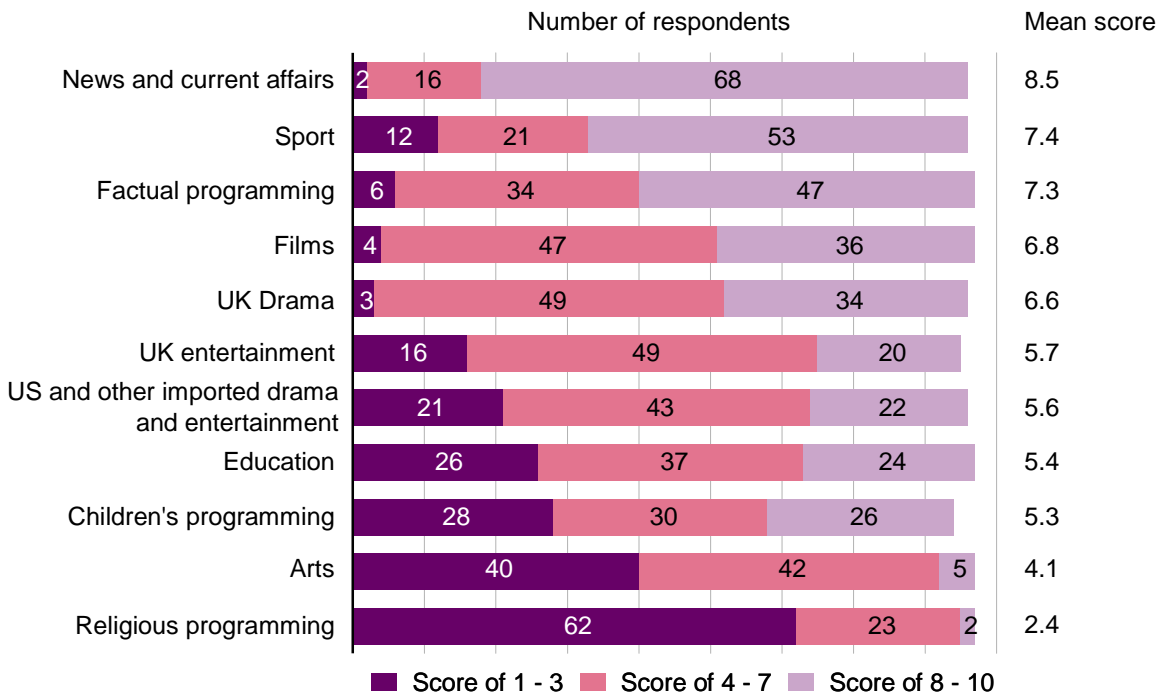
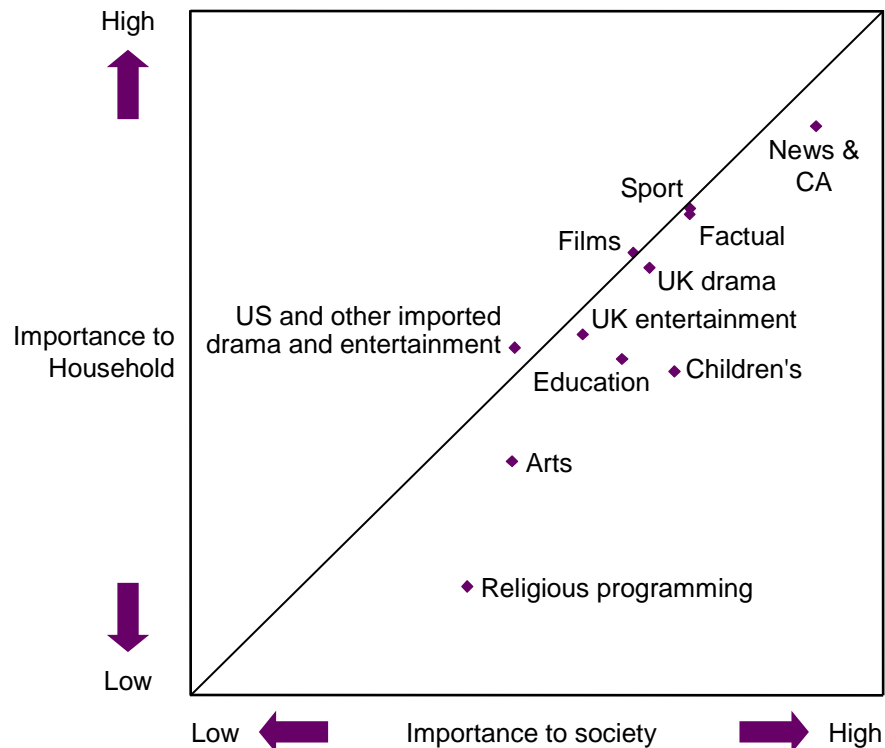


Figure 9 compares, for each genre, the mean score for personal importance to the corresponding mean score for importance to society. Religion, children's, education and arts appear to be regarded as more important to society as a whole than to people personally, since these genres are to the right of the diagonal line.

¹⁰ Base: 84-87 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

Figure 9. Importance to society / households of different genres (Based on mean scores)¹¹



The combination of importance and commercial appropriateness suggests some genre clusters:

- Important and non-commercial: News & Current Affairs, factual, children's and education. These four genres were all seen as very important, particularly when thinking about society as a whole. However, viewers tended to think that they are not well suited to commercial activity. It was felt that news and factual programmes should be unbiased and both children and their parents should be protected from over-commercialisation in the children's genre.
- Important and commercial: Sport, films, UK drama. These genres were all very important to viewers, on both a personal level and when thinking about society as a whole. Sport was seen as the most commercial genre, lending itself particularly well to sponsorship and pay-per-view. Films were also seen as highly commercial. UK drama was also seen as commercial, in terms of the appropriateness of prop placement and sponsorship, though viewers were not happy with the idea of having this kind of programming distributed as pay-per-view, or including interactivity.

¹¹ Base: 84-87 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

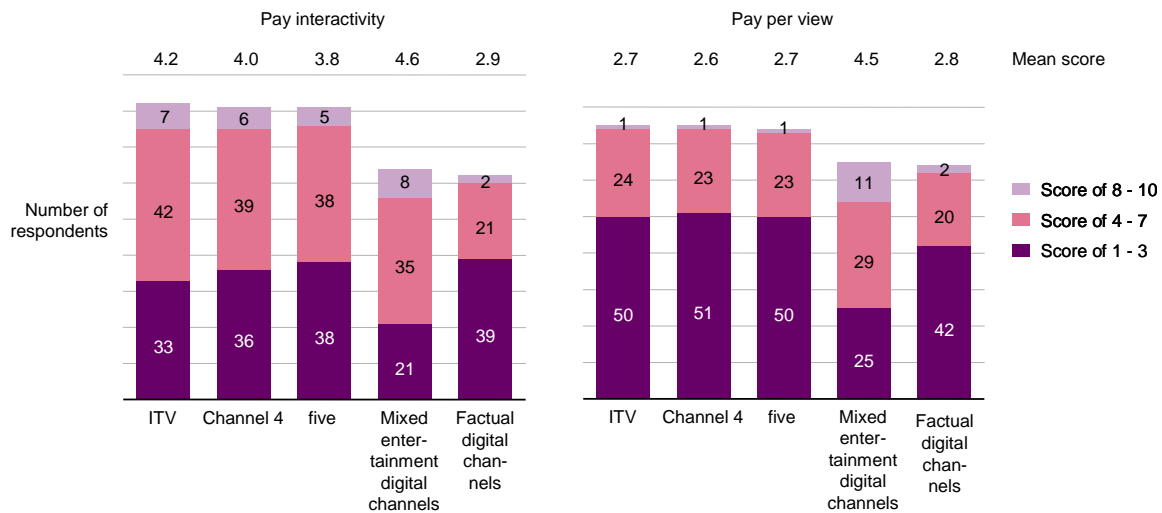
- Less important and non-commercial: Arts, religion. Both of these genres received lower than average importance scores, and were seen as largely inappropriate for commercial activity.
- Less important and commercial: US entertainment and drama. Participants felt these programmes were relatively good places to employ most of the funding mechanisms described. This may again be linked to the fact that many respondents already have experience of these kinds of funding mechanisms in US programming such as *Sex and the City* and *The Simpsons*.

Attitudes across different television channels

Respondents were also asked about how their attitudes to pay-per-view and pay interactivity varied in relation to different television channels. They were asked about the three commercial terrestrial channels (ITV1, Channel 4 and Five) and also about mixed entertainment channels and factual channels in the multichannel environment. The range of appropriateness scores in relation to these different channels is shown in Figure 10.

People did not differentiate enormously between the commercial terrestrial channels. The idea of pay-per-view on these channels did not seem appropriate to many respondents, and some pointed out the practical difficulties that this would involve. The mixed entertainment digital channels were seen as the best place for both pay interactivity and pay-per-view.

Figure 10. Appropriateness of funding mechanisms on different channels (1 = not at all appropriate, 10 = very appropriate)¹²



¹² Base: 74-82 respondents for the commercial terrestrial channels; 62-65 respondents for the digital channels. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

Rankings

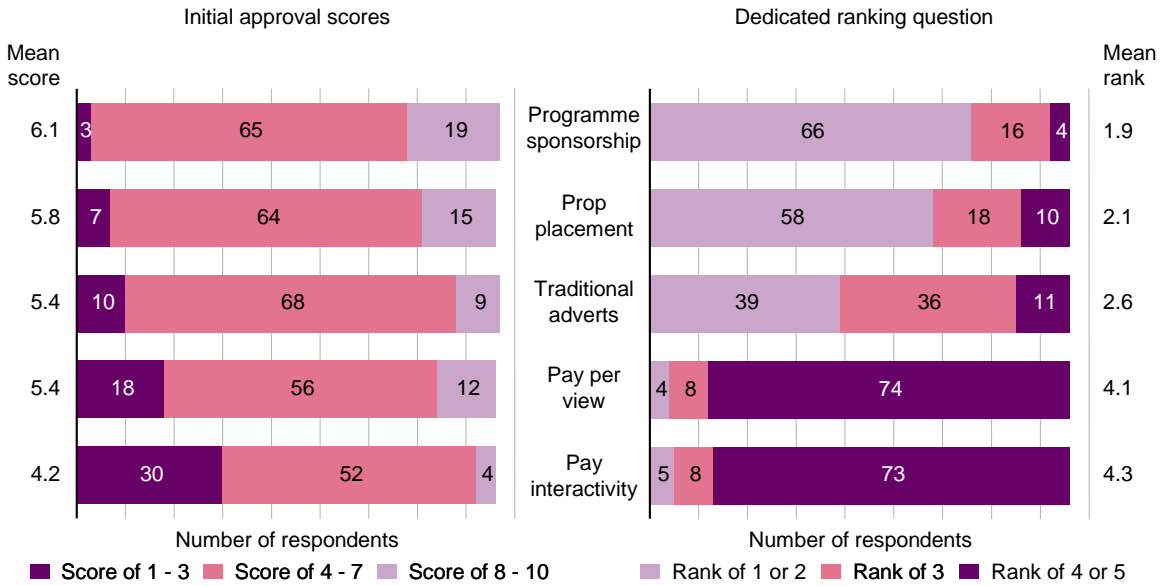
Two rankings can be calculated from the research. The first is a ranking in terms of the average approval scores which we have already discussed. The second comes from a separate ranking question which was included in the discussions, where respondents were asked to rank the different funding mechanisms from one to five in order of preference. The results of the rankings based on these two different questions are shown in Figure 11. It is worth noting that the standalone ranking question was given to respondents at the end of the discussion about today's funding mechanisms while the approval scores were measured before the in-depth discussion, so it is possible that opinions might have changed slightly as a result of this.

In terms of mean scores, programme sponsorship ranked highest in both cases. Respondents found there was little to complain about in terms of this kind of sponsorship – it felt less intrusive than traditional advertising, without suggesting a big change in their programmes' content or distribution.

Prop placement and traditional adverts were in a second group. The popularity of traditional advertising seems to have increased slightly between the initial approval scores and the ranking question. This result reflects the observation that, having initially raised objections, people warmed to the idea of adverts over the course of the session, possibly as a way of maintaining the status quo.

Pay-per-view and pay interactivity ranked lowest. Pay interactivity scored a low average approval score due to the presence of a group of strong rejectors, as discussed on page 16. In the standalone ranking question, these rejectors were not able to make their objections as strongly, allowing pay interactivity to rank slightly higher than PPV.

Figure 11. Comparison of ranking by means of initial approval scores and dedicated ranking question
 (Initial approval scores: 1 = strong disapproval, 10 = strong approval;
 Dedicated ranking question: 1 = most preferred, 5 = least preferred)¹³



¹³ Base: 86 / 87 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

Section 4

Television funding in the future

After discussing today's funding mechanisms, respondents were asked for their opinions on seven new mechanisms that are currently restricted (either across all channels or specific platforms).

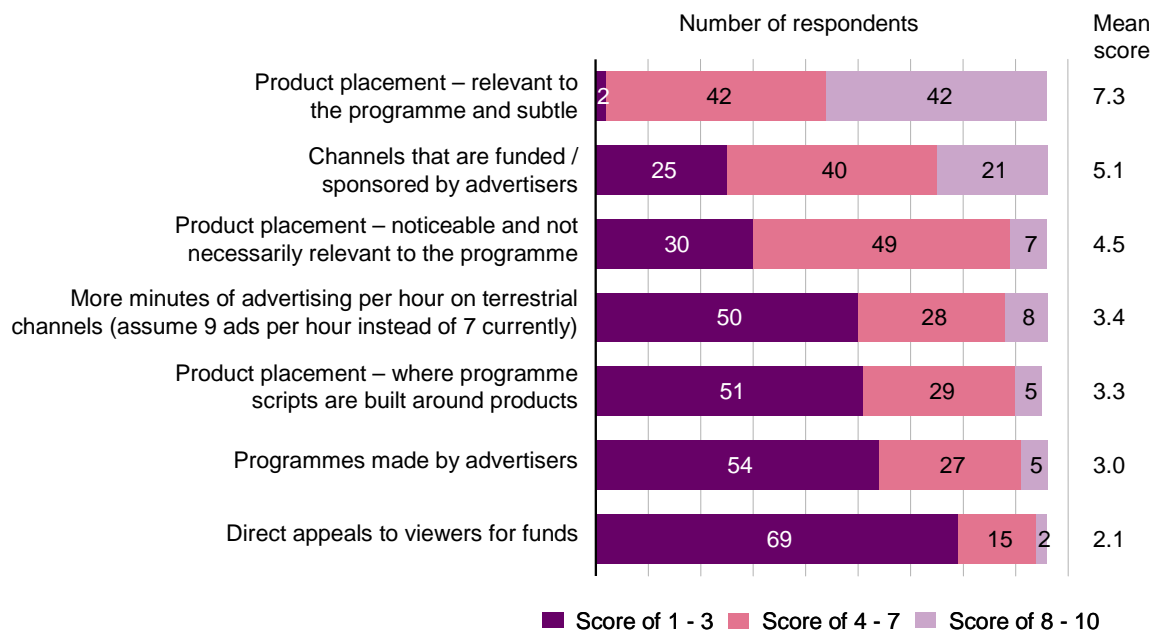
The seven mechanisms included three different types of product placement. These are referred to as background, noticeable, and script product placement in this section. The exact definitions of these and the other funding types that were given to respondents can be found in the Objectives & methodology section of this report.

The following sections of this report relate to attitudes to these future funding mechanisms.

Approval scores

As with today's funding mechanisms, respondents were asked to give their approval of the future funding types. Again, approval scores were marked out of ten with a score of one indicating strong disapproval and a score of ten indicating strong approval. The range of approval scores for each of the seven future funding types is shown in Figure 12.

Figure 12. Approval of potential new funding mechanisms (1 = strong disapproval, 10 = strong approval)¹⁴



¹⁴ Base: 85 / 86 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

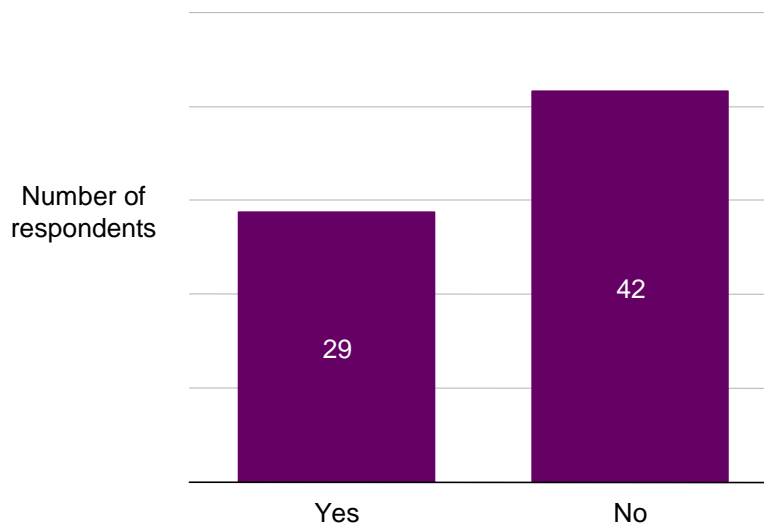
Initial approval of background product placement was high. In fact, it was the only one of the seven potential future funding mechanisms that was, on average, approved of (the rest all scored an average of under 5.5). Direct appeals, at the other end of the spectrum, were universally disliked.

Product placement

Product placement was generally popular amongst respondents, especially when it was seen to enhance the realism of a programme, was relevant and was not too prominent. If it becomes too “aggressive” on screen or is perceived to compromise a programme’s editorial integrity, then it is less favourably accepted.

A substantial proportion of people believed that product placement already exists on at the moment. Product placement was described to respondents as “where advertisers pay to have their products used or featured in a television programme”. Figure 13 shows the number of people who believed that product placement currently exists based on this definition. This relatively large number may be partly due to the fact that some respondents answered this in terms of product placement in films shown on television.

Figure 13. Awareness of programmes that carry product placement at the moment (Base: all excluding London respondents)¹⁵



Many people thought that product placement currently takes place on television programmes in the UK. For example, some people thought that chocolate in the shop on *Coronation Street* is placed by *Cadbury* and is linked to their sponsorship of the programme.

There was also reasonably widespread belief that products are placed in programmes such as *Top Gear*, and that tour operators pay money to have their holidays included in travel programmes like *Wish You Were Here...?*

¹⁵ Base: 73 (all excluding London respondents). Respondents’ preconceptions about product placement were not accurately captured in the London group, due to an unprompted conversation about product placement which occurred before this question could be asked. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

Most people were aware of product placement in films – James Bond’s car was the archetypal example.

There was less awareness of product placement in shows like *Sex and the City*, although some people did pick up on this and similar placement in shows like *Desperate Housewives*. A number of people mentioned *Coca Cola* in *American Idol* (pixelated for UK transmission).

A recurring theme was that the blurring out of brands in (usually imported) programmes was often ineffective. Many respondents said they were actively drawn towards brands which have been blurred out in this way, and which they would probably otherwise have ignored. They are intrigued, and try to work out what the original brand is, often with success.

“When it’s fuzzed out it draws more attention to the product”

– Female, 53, Edinburgh

Few seemed particularly concerned with existing programmes which carry product placement – even those programmes which they mistakenly assume do so. The balance of these programmes seemed reasonable at the moment, and real concerns only started to surface when respondents were faced with the prospect of finding product placement in more and more places – many used the phrase “like in America” to describe this.

As with prop placement, the most positive thing about product placement is the level of realism it can give to a programme. Again, there was a feeling that realism can only be achieved by ensuring that a representative range of brands are included where product placement takes place.

Background product placement

Background product placement was approved of because the viewer experience was seen to be like that of prop placement – the only difference being a ‘behind the scenes’ monetary deal. If it is subtle and relevant to the programme, people assumed that it will largely go unnoticed. If this is the case, and all that happens is that the programme makers received more money to make programmes, then participants felt they had little reason to dislike it. As with prop placement, viewers valued its ability to add realism to a programme.

“It would be good if it’s not too in your face and still relevant to the programme”

– Female, 32, Belfast

Noticeable product placement

Noticeable product placement was liked less because it was seen as more disruptive and described by participants as being “in your face”. Participants, especially female respondents, did not like the idea of irrelevant products appearing in programmes.

“Advertisers would make the programme much more about the product”

– Male, 37, Belfast

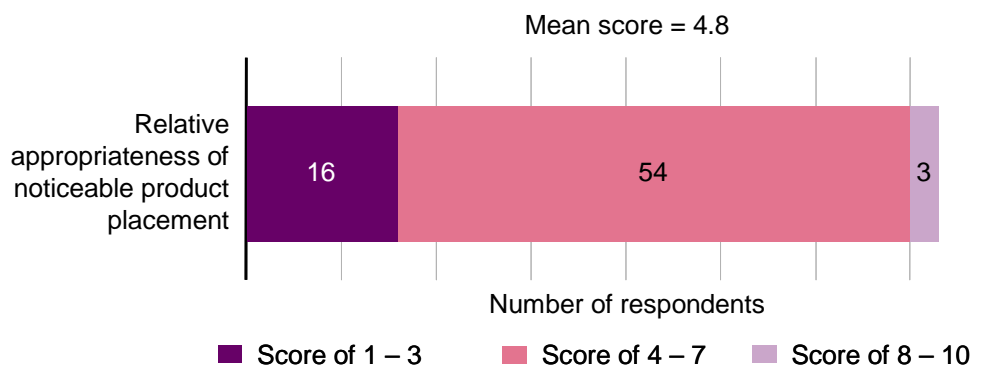
Both parts of the definition of noticeable product placement – that it is noticeable and not necessarily relevant to the programme – were of concern. The two parts of the definition

were seen as connected: if a placed product is irrelevant to the programme then it will be more noticeable.

Some respondents said that if such activity were to get too prominent they would just switch off. However, people differed on what is and is not “noticeable” and recognised that achieving consensus on this issue could be very difficult or even impossible.

Noticeable product placement was thought to be marginally more acceptable in films shown on television than in other programmes (Figure 14) – this is possibly driven by the fact that this is where viewers currently see it taking place.

Figure 14. Relative appropriateness of noticeable product placement in films on television and other programmes on television (1 = more acceptable in films on TV, 10 = more acceptable in other TV programmes)¹⁶



Script product placement

Script product placement was liked least of the three types of product placement that were tested. It was felt that this is where programme makers would be most compromised in terms of their editorial integrity, and that this type of product placement would probably be noticeable even if it were part of the story.

There were some participants who thought this could work well because products would be integrated with programme content and not be irrelevant. Respondents mentioned WeightWatchers in *Sex and the City* as an example of how this could work (although others argued that this fit better into the category of noticeable product placement).

However, most people did not like the idea of advertisers ‘buying control’ and compromising the integrity of programmes.

As a rule, participants made it clear that they did not like being advertised to by stealth. For instance, those who did not know that *Castaway* was sponsored by FedEx felt some resentment when it is pointed out to them. Their enjoyment of the film was reduced when they felt they had been somehow ‘duped’. Had they been told before watching the film that certain commercial arrangements were in place, they said they may have still enjoyed the film as much. This suggests that commercial relationships should be disclosed up front.

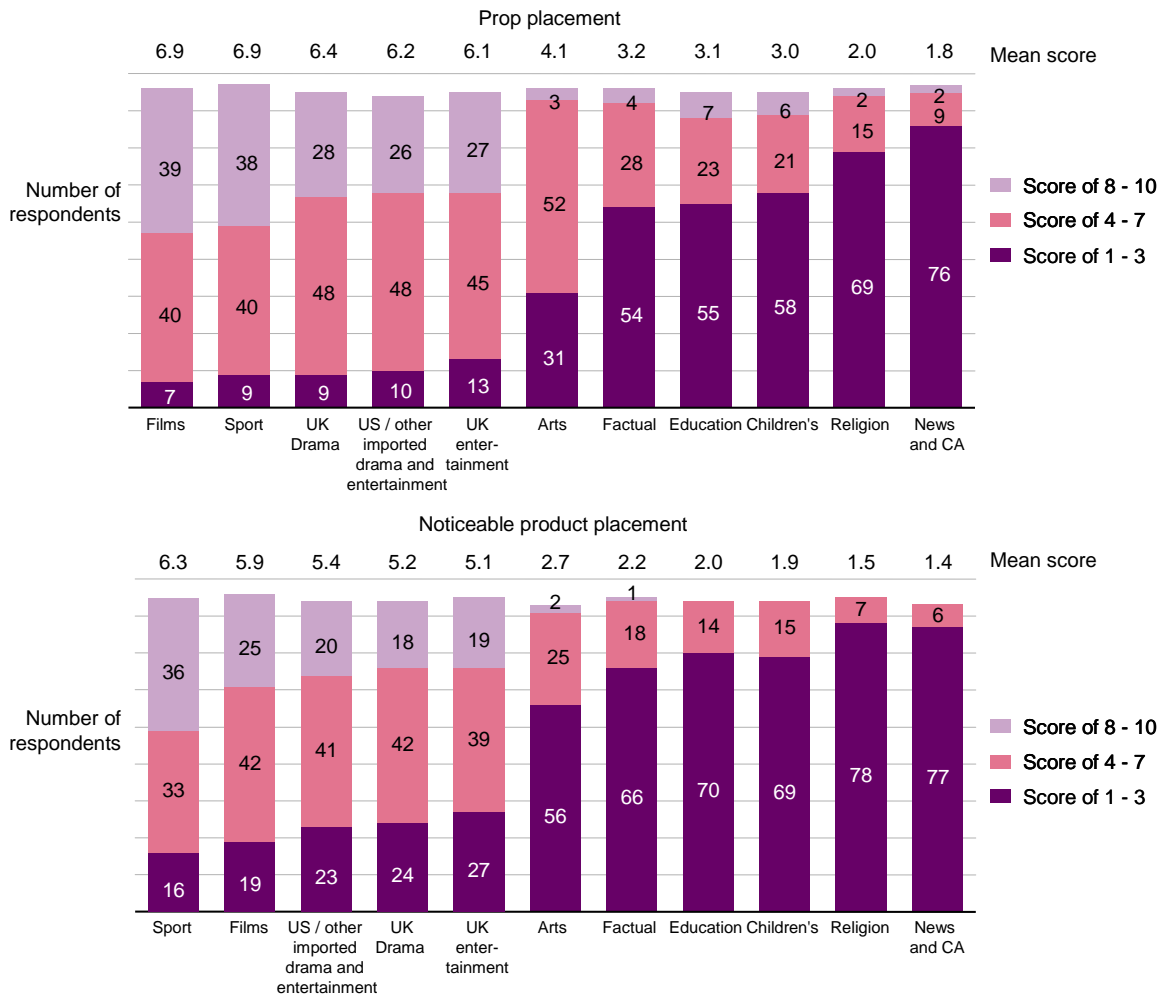
¹⁶ Base: 73 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

“As long as people know they’re being targeted by advertisers, I don’t mind”

– Male, 27, Belfast

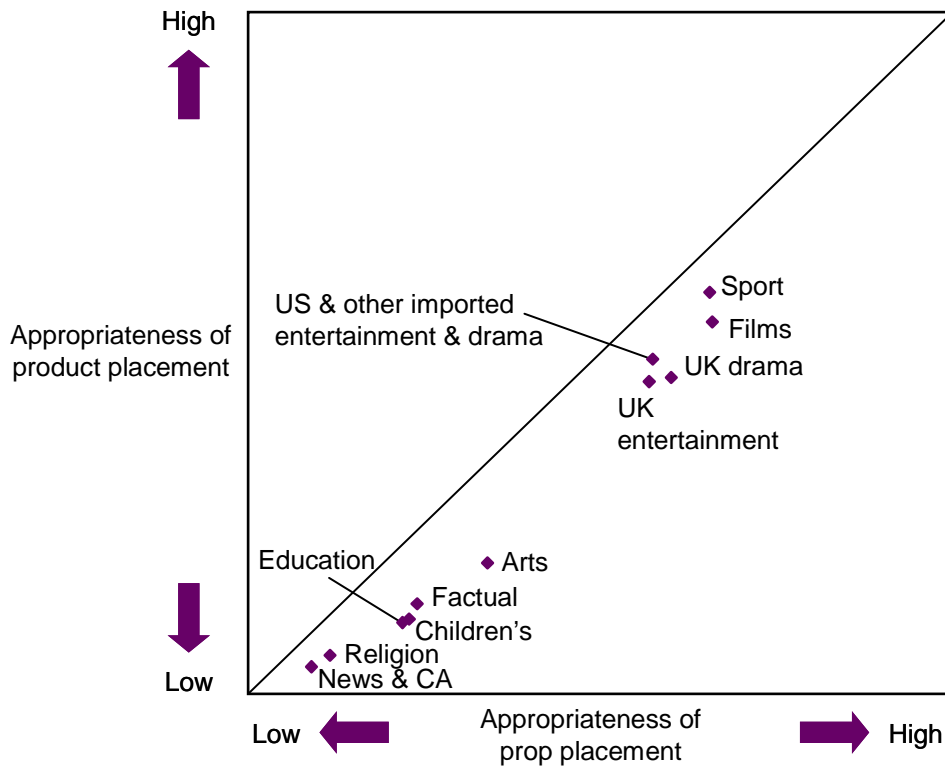
The acceptability of noticeable product placement by genre was very similar to that for prop placement. The order of the genres in terms of appropriateness is largely the same for the two different funding mechanisms, as can be seen in Figure 15. Noticeable product placement was judged to be slightly less appropriate all round, however, as illustrated in Figure 16.

Figure 15. Appropriateness of prop placement and noticeable product placement by genre (1 = not at all appropriate, 10 = very appropriate)¹⁷



¹⁷ Base: 83-87 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

Figure 16. Appropriateness, by genre, of prop placement against noticeable product placement¹⁸



Direct appeals

Participants were generally negative towards direct appeals and in many cases hostile.

“It’s essentially begging – I can’t imagine a world where this would be necessary”

– Male, 25, London

“Dead against this”

– Female, 41, Manchester

One of their major concerns was that of fairness in direct appeals. They did not like the prospect of what they described as ‘free-riders’ who would watch the programming but never contribute to its upkeep themselves.

They also had concerns about exploitation of the vulnerable. This was particularly relevant in the context of religious programmes, as well as more generally when thinking about the very young, the very old and the less well off.

They also doubted the viability of the funding mechanism as a concept. People found it difficult to believe that anyone would pay at all, making such a mechanism practically unviable.

¹⁸ Base: 83-87 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

A small minority of people felt direct appeals might possibly be appropriate to fund some arts and community programmes, but in the groups these respondents faced a wall of disapproval from others.

Advertiser-funded programmes

People voiced real concerns about advertiser-funded programmes (AFP). They did not like the idea of being sold to through the entirety of a programme – many respondents felt they were being sold to regularly enough through the commercial breaks. People also felt that it would be difficult to trust such programming and that this would undermine any enjoyment they might derive. Again, transparency was seen to be important.

This negativity about AFP seemed to clash with the fact that people were supportive of programme sponsorship, especially when it was believed that the sponsors put money directly into the programming. However, the difference was down to the perceived editorial involvement of the advertiser. With programme sponsorship, it was largely assumed that advertisers would have no influence on the content of the programme and would simply exist at the start and end of each commercial break. AFP on the other hand, implied strong editorial control from the advertisers, which was worrying to many people.

“Advertisers would be too influential”

– Male, 71, Cardiff

“It would be ok as long as they were good quality programmes, not controlled by advertisers”

– Female, 45, Edinburgh

More minutes of traditional advertising

Most respondents were not comfortable with the prospect of more spot advertising on commercial terrestrial channels. As seen earlier, commercial advertising is grudgingly accepted by most, and the idea of more does not appeal.

However, despite general resistance to the idea, some participants said they would tolerate two more minutes of advertising per hour, as long as the commercials were entertaining.

Participants believed they may not notice an extra two minutes of advertising an hour, though this attitude was tied into the widespread disbelief that only an average of seven minutes of advertising are currently allowed on terrestrial channels per hour. Most respondents assumed that many more minutes of adverts than this are shown on average. When asked about this apparent gap between perception and regulation, viewers had several possible solutions:

- Some people thought there might be a difference between the minutes allowed during peak and off-peak times, and that their perception of a greater number of advertising minutes being shown might be linked to their tendency to watch in peak time.
- Some thought that non-commercial trailers might add to the length of ad breaks, making them feel longer than seven minutes on average.

- Others thought that there might be more minutes allowed on multichannel compared to terrestrial television.

Channel sponsorship

Overall, the idea of advertiser-sponsored channels was broadly acceptable. Respondents felt that as an example, an extension of Cadbury's sponsorship of *Coronation Street*, where instead Cadbury sponsored the whole of ITV1, would be largely acceptable. The key message was that respondents would feel much more positive about a channel whose programmes were independent from the channel sponsor compared to a channel which broadcast only sponsor-funded programming. Participants were not as comfortable with the idea if a sponsored channel was populated entirely by AFP.

Groups of interest

Younger people (i.e. under 40) generally approved of these mechanisms less than older people (i.e. over 40), and appear to be particularly resistant to the idea of more spot advertising – which was felt to interrupt the flow of content to the viewer. This is consistent with their relative dislike of traditional advertising and programme sponsorship, as discussed earlier in this report. On the other hand, background product placement (which in its purest form is almost unnoticeable to the viewer) was liked more by younger than older people. This appears to suggest that younger respondents prefer mechanisms which do not disrupt their viewing.

People with cable or satellite television tended to approve more strongly of product placement (than those without cable or satellite television). It is difficult to know whether their relatively high approval is a result of their exposure to the multichannel environment which makes them more amenable to this type of funding in the long term (perhaps through increased exposure to product placement in imported programmes, which are prevalent on non-terrestrial channels).

The impact on children

Many of the concerns that were raised about the different funding mechanisms revolved around their existing or potential effects on children. Several key points arose:

- *Protection of children* – there was a general feeling that children should be protected from advertising, and that being exposed to brands at a young age was somewhat 'unhealthy'.
- *"Pester power"* – from the parents' point of view, there was also concern that an increase in the volume of commercials that children were exposed to would also lead to an increase in the amount of pestering they would get from their children, particularly around Christmas. This was also raised as a concern when talking about product placement in children's programming.
- *Telephone bills* – many parents expressed concerns about pay interactivity in relation to their children. Several had direct experience of large unwanted telephone bills as a result of their children ringing premium rate numbers from the television, and most people are unaware of ways that exist to prevent children from using these numbers.

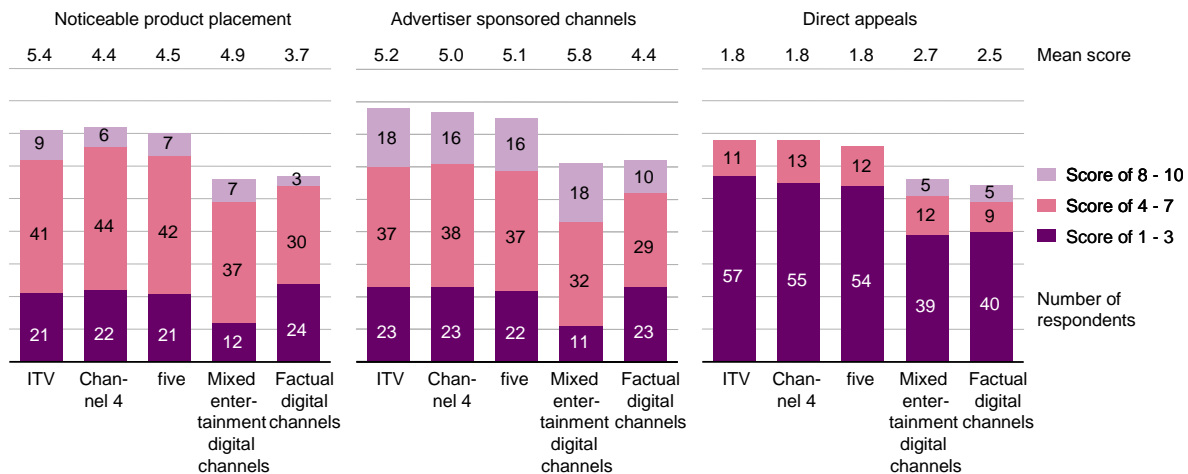
- *Children’s genre* – this genre scored low in terms of appropriateness for all the different funding types tested during the workshops.

It is worth noting that the concerns about children were not confined to those respondents with children themselves. Young, pre-family respondents were also aware of the issues and felt they were important.

Attitudes across different television channels

The appropriateness of noticeable product placement, advertiser-sponsored channels and direct appeals on different channels can be seen in Figure 17. As was found with existing funding mechanisms, people did not differentiate hugely between the commercial terrestrial channels. The distinction between mixed entertainment channels and factual channels in the multichannel environment still exists however, with factual again seen as a less appropriate place for these mechanisms.

Figure 17. Appropriateness of different funding mechanisms on different channels (1 = not at all appropriate, 10 = very appropriate)¹⁹



Attitudes to broadcasting principles

Most people strongly supported the principles that underpin the current regulation, with support highest for the protection of viewers and for the principle of editorial independence in the production process. The range of scores for each of the four tested principles are shown in Figure 18.

“It’s very important that programming remains impartial and is kept creatively ‘in-house’”

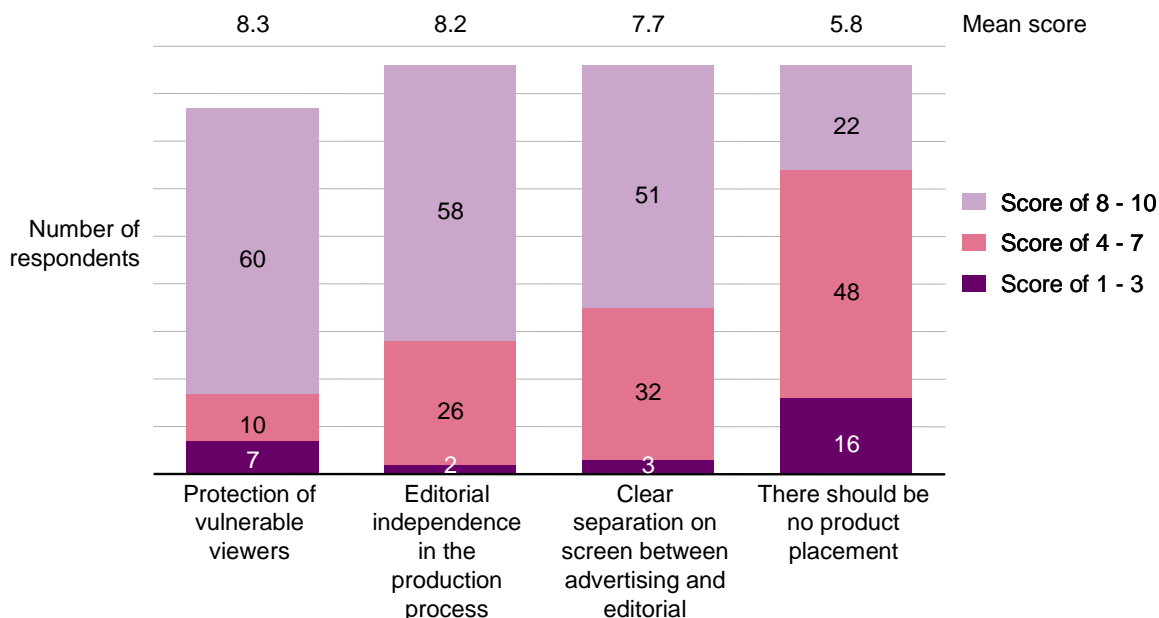
– Male, 30, London

¹⁹ Base: 54-62 respondents for the commercial terrestrial channels; 66-78 respondents for the digital channels. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

“The protection of vulnerable viewers is massively important. Advertising is a very strong medium”

– Female, 27, London

Figure 18. Approval of the principles that determine the current rules on what broadcasters and advertisers may or may not do on screen (1 = strong disapproval, 10 = strong approval)²⁰



A minority of respondents demonstrated a strongly purist attitude towards programme integrity. Indeed a group of 22 respondents gave a maximum score of 10 to the principles concerning “clear separation on screen between the editorial content and advertising” and “editorial independence in the production process”. Thinking about future mechanisms, these “purists” tended to support the status quo, with higher scores for more adverts and lower scores for product placement and channel sponsorship (in other words, lower scores for mechanisms that may be seen as encroaching on the integrity of programming).

Purists were likely to be informed by the public service tradition of television in the UK. For them, education is a relatively important purpose of television, and BBC TWO and Channel 4 are relatively important channels.

The trade-off

After initial discussions about the potential new funding mechanisms in isolation, respondents were asked to reconsider their positions in the face of a trade-off decision having to be made. Respondents were given the following scenario to consider:

²⁰ Base: 77-86 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

Imagine a world in the future where money earned from traditional television advertising is under pressure. In this world, some of the new ways of making money that we have talked about could potentially make up any shortfall.

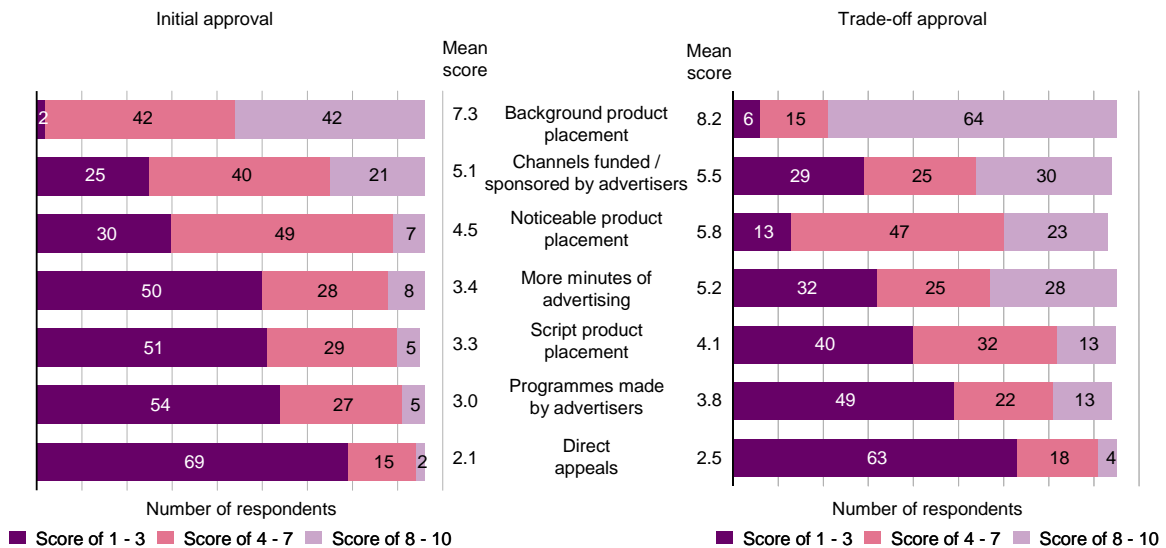
For each of the new ways to make money, please indicate to what extent you would prefer it to remain disallowed (which some people think could lead to less new programming being made and more repeats being shown) or to be allowed (which some people think could lead to more new programming being made and less repeats being shown).

When people were forced to make this trade-off they were more inclined to relax the regulations (Figure 19). Increased advertising minutage received a particularly large boost as a result of the trade-off exercise. This comes back once again to the tolerance that many viewers have of spot advertising – they may not be hugely positive about them, but for many it was a case of feeling more comfortable with a mechanism they are already aware of.

“Anything that reduces repeats and maintains the quality of the programme is good”

– Male, 52, Edinburgh

Figure 19. Difference between initial approval scores and scores for trade-off question (1 = strong disapproval, 10 = strong approval)²¹



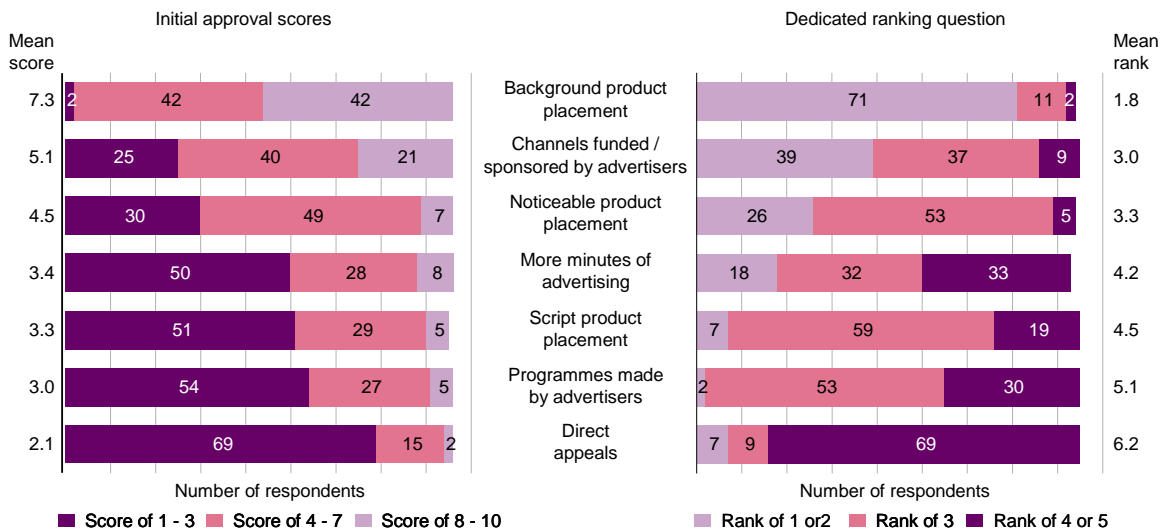
²¹ Base: 83-86 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

However, there was some resistance to the idea of a trade-off having to be made at all, as many people did not accept the premise that the television industry could face a funding crisis.

Rankings

Again, there are two possible rankings that can be constructed for the seven potential new funding mechanisms: one from the initial approval scores for each mechanism and one from a standalone ranking question that was included at the end of the discussion on the potential new funding mechanisms. These two rankings are compared in Figure 20.

Figure 20. Comparison of ranking by means of initial approval scores and dedicated ranking question
(Initial approval scores: 1 = strong disapproval, 10 = strong approval;
Dedicated ranking question: 1 = most preferred, 7 = least preferred)²²



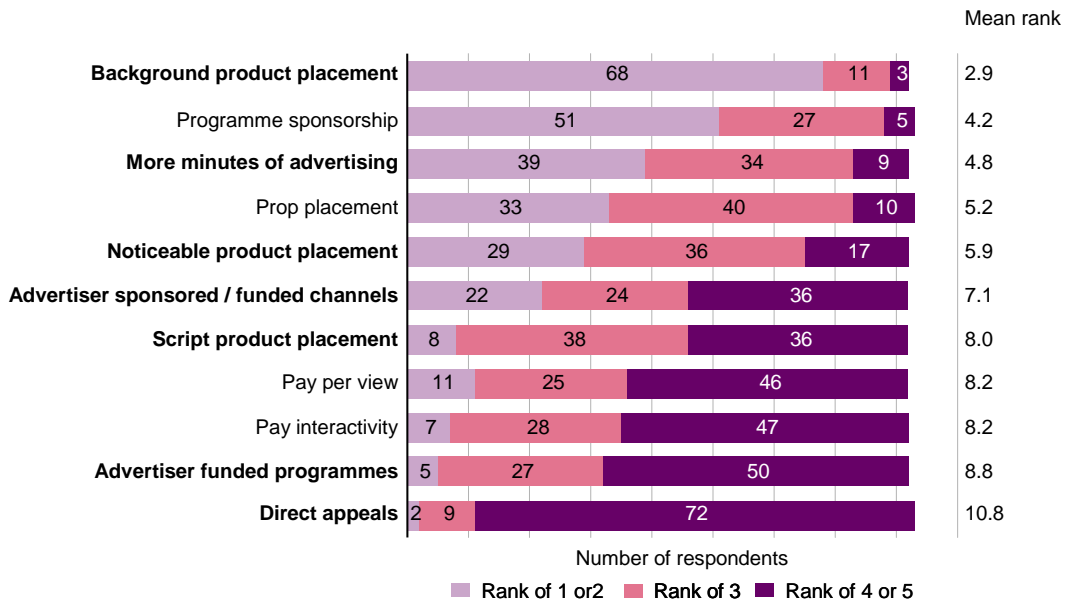
There is reasonable consistency between the two possible rankings. According to the average scores/ranks, background product placement ranked highest in both cases. This was followed by advertiser-sponsored channels, noticeable product placement and increased advertising minutage. Finally, script product placement, advertiser-funded programmes and direct appeals were the least popular.

The positioning of increased advertising minutage went up in the final ranking question (compared to the approval scores). This can partly be explained because a minority of respondents had particularly strong views which can be communicated more forcefully in cardinal rather than ordinal scores. This may also be explained by the fact that during the course of the discussion people became more conservative, and once again advertising is a concept that respondents were familiar with even if they do not necessarily claim to like it that much.

²² Base: 83-86 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

To end the groups, respondents were asked to rank all 11²³ different funding mechanisms in order of preference, including mechanisms that are in use today and also those that could potentially be used in the future (Figure 21). This ultimate ranking suggests that some future mechanisms could potentially be more popular than some that are already in existence. Background product placement, for example, ranked top of the overall list. Some caution should be exercised when interpreting this information, since the task of ranking 11 items such as these is a difficult exercise.

Figure 21. Final ranking of all funding mechanisms (1 = most preferred, 11 = least preferred)²⁴



Bold indicates potential new funding mechanisms; non-bold indicates current funding mechanisms

²³ In fact, there were 12 different funding mechanisms in total. However, traditional adverts have been omitted from the final ranking in Figure 21 as they duplicated "more minutes of advertising".

²⁴ Base: 82-83 respondents. Respondents were asked to complete a questionnaire during each of the sessions. Although the research was qualitative, the findings have been supplemented quantitatively in this report using results derived from these questionnaires. Though sample sizes are relatively small, the data presented here is consistent with the qualitative story that emerged. These results have been presented in the report based on number of respondents.

The questionnaire

Section 1: About You

1. What is your name?
2. How old are you?
3. Are you...? Male Female
4. Do you have any children living with you at home? Yes No
5. If so, how old are your children?
6. Occupation of head of household?

Section 2: Your relationship with television

7. What TV platform do you have at home? *(Tick as many boxes as apply)*

<input type="checkbox"/> 4 or 5 channels only	<input type="checkbox"/> Top-up TV	<input type="checkbox"/> Sky – satellite, pay monthly subscription
<input type="checkbox"/> Freeview	<input type="checkbox"/> Cable (ntl or Telewest)	<input type="checkbox"/> FreeSat – satellite, do not pay monthly subscription
8. If you have cable or Sky, do you subscribe to any premium packages? *(Tick as many boxes as apply)*

<input type="checkbox"/> Sky Movies channels	<input type="checkbox"/> Sky Sports channels	<input type="checkbox"/> Other
--	--	--------------------------------
9. Do you have a PVR or DVR (personal or digital video recorder)? *(Tick as many boxes as apply)*

<input type="checkbox"/> Sky Plus	<input type="checkbox"/> Tivo	<input type="checkbox"/> Other	<input type="checkbox"/> No
-----------------------------------	-------------------------------	--------------------------------	-----------------------------
10. How much TV does your household watch per day? *(Number of hours)*

Breakfast (6-9am) <input type="text"/>	Daytime (12-5pm) <input type="text"/>	Late night (after 10pm) <input type="text"/>
Morning (9-12) <input type="text"/>	Evening (5-10pm) <input type="text"/>	
11. How important to you and your household are the following channels? *(1 = not at all important and 10 = very important)*

BBC ONE <input type="text"/>	BBC TWO <input type="text"/>	ITV1 <input type="text"/>	C4 <input type="text"/>	five <input type="text"/>
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12. In your opinion, how important to society are these channels? *(1 = not at all important and 10 = very important)*

BBC ONE <input type="text"/>	BBC TWO <input type="text"/>	ITV1 <input type="text"/>	C4 <input type="text"/>	five <input type="text"/>
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STOP WRITING!

Section 2: Your relationship with television

13. How important to you and your household are the following TV genres?

(1 = not at all important and 10 = very important)

News and current affairs	<input type="text"/>	UK Entertainment (including reality, lifestyle, quiz shows)	<input type="text"/>
Sport	<input type="text"/>	Films	<input type="text"/>
US and other imported entertainment and drama	<input type="text"/>	UK Drama	<input type="text"/>
Children's	<input type="text"/>	Arts	<input type="text"/>
Factual (including documentaries, history, science)	<input type="text"/>	Consumer programmes	<input type="text"/>
Religion	<input type="text"/>	Education	<input type="text"/>

14. In your opinion, how important to society are these TV genres?

(1 = not at all important and 10 = very important)

News and current affairs	<input type="text"/>	UK Entertainment (including reality, lifestyle, quiz shows)	<input type="text"/>
Sport	<input type="text"/>	Films	<input type="text"/>
US and other imported entertainment and drama	<input type="text"/>	UK Drama	<input type="text"/>
Children's	<input type="text"/>	Arts	<input type="text"/>
Factual (including documentaries, history, science)	<input type="text"/>	Consumer programmes	<input type="text"/>
Religion	<input type="text"/>	Education	<input type="text"/>

15. If you have more than 5 channels, which other channels do you watch regularly? And how important are they to you and your household?

(1 = not at all important and 10 = very important)

[channel]-----	<input type="text"/>	[channel]-----	<input type="text"/>
[channel]-----	<input type="text"/>	[channel]-----	<input type="text"/>
[channel]-----	<input type="text"/>	[channel]-----	<input type="text"/>

STOP WRITING!

PTO

Section 2: Your relationship with television

16. What do you think the main purposes of TV should be? (Indicate the importance of each, where 1 = not at all important and 10 = very important)

Entertain	<input type="text"/>	Promote commercial activity	<input type="text"/>	Create shared experiences	<input type="text"/>
Educate	<input type="text"/>	Relax	<input type="text"/>	Inform	<input type="text"/>

Please write down any comments:

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17. Do you think that the quality of TV programmes has generally got better or worse over the last five years? (1 = much worse and 10 = much better)

Please write down any comments:

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STOP WRITING!

PTO

Section 3: Traditional TV advertising

18. To what extent do you personally approve or disapprove of traditional TV advertising? (1 = strong disapproval and 10 = strong approval)

19. Please explain your score

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20. In your opinion, what impact do you think traditional TV advertising has on society? (1 = big negative impact; and 10 = big positive impact)

21. Please explain your score

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STOP WRITING!

22. To what extent do you agree / disagree with the following statements?
(1 = strongly disagree; 10 = strongly agree)

"I don't mind having the adverts alongside programmes on TV"

"I would be happy for more adverts to be shown on TV"

"Adverts provide me with useful information"

"Overall adverts are a good thing"

"Adverts entertain me"

Please write down any comments:

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STOP WRITING!

PTO

Section 3: Traditional TV advertising

21. Do you think adverts on TV are more or less intrusive than they were five years ago? (1 = more intrusive and 10 = less intrusive)

22. Do you tend to watch or not watch adverts? (1 = never watch and 10 = always watch)

23. If you tend not to watch adverts (ie. score 5 or less), what do you usually do when they come on? (tick as many as apply)

Flick to another channel

Skip with PVR or fast forward if using the video

Go to the toilet

Make a drink

Talk to others watching

Please write down any comments:

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STOP WRITING!

Section 4: Other advertiser-paid funding mechanisms – Sponsorship

26. To what extent do you personally approve or disapprove of programme sponsorship? (1 = strong disapproval and 10 = strong approval)

27. Please explain your score

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28. In your opinion, what impact do you think programme sponsorship has on society? (1 = big negative impact and 10 = big positive impact)

29. Please explain your score

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30. How appropriate is programme sponsorship in the following genres? (1 = not at all appropriate and 10 = very appropriate)

News and current affairs	<input type="text"/>	UK Entertainment (including reality, lifestyle, quiz shows)	<input type="text"/>
Sport	<input type="text"/>	Films	<input type="text"/>
US and other imported entertainment and drama	<input type="text"/>	UK Drama	<input type="text"/>
Children's	<input type="text"/>	Arts	<input type="text"/>
Factual (including documentaries, history, science)	<input type="text"/>	Consumer programmes	<input type="text"/>
Religion	<input type="text"/>	Education	<input type="text"/>

Please write down any comments:

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STOP WRITING!

PTO

Section 4: Other advertiser-paid funding mechanisms – Prop placement

31. Product placement is where advertisers pay to have their products used or featured in a TV programme.

Are you aware of any programmes at the moment that carry product placement?

Yes

No

32. If yes, please say which programmes

STOP WRITING!

PTO

Section 4: Other advertiser-paid funding mechanisms – Prop placement

33. To what extent do you personally approve or disapprove of prop placement in TV programmes? (1 = strong disapproval and 10 = strong approval)

34. Please explain your score

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35. In your opinion, what impact do you think prop placement in TV programmes has on society? (1 = big negative impact and 10 = big positive impact)

36. Please explain your score

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37. How appropriate is prop placement in TV programmes in the following genres? (1 = not at all appropriate and 10 = very appropriate)

News and current affairs	<input type="text"/>	UK Entertainment (including reality, lifestyle, quiz shows)	<input type="text"/>
Sport	<input type="text"/>	Films	<input type="text"/>
US and other imported entertainment and drama	<input type="text"/>	UK Drama	<input type="text"/>
Children's	<input type="text"/>	Arts	<input type="text"/>
Factual (including documentaries, history, science)	<input type="text"/>	Consumer programmes	<input type="text"/>
Religion	<input type="text"/>	Education	<input type="text"/>

Please write down any comments:

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STOP WRITING!

PTO

Section 5: Viewer-paid funding mechanisms – Pay interactivity

38. To what extent do you personally approve or disapprove of “pay interactivity” in programmes, which involves viewers being invited to pay to participate in some way? (1 = strong disapproval and 10 = strong approval)

39. Please explain your score

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40. In your opinion, what impact do you think “pay interactivity” in programmes has on society? (1 = big negative impact on society and 10 = big positive impact on society)

41. Please explain your score

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STOP WRITING!

42. How appropriate is “pay interactivity” in TV programmes in the following genres? (1 = not at all appropriate and 10 = very appropriate)

News and current affairs	<input type="text"/>	UK Entertainment (including reality, lifestyle, quiz shows)	<input type="text"/>
Sport	<input type="text"/>	Films	<input type="text"/>
US and other imported entertainment and drama	<input type="text"/>	UK Drama	<input type="text"/>
Children's	<input type="text"/>	Arts	<input type="text"/>
Factual (including documentaries, history, science)	<input type="text"/>	Consumer programmes	<input type="text"/>
Religion	<input type="text"/>	Education	<input type="text"/>

Please write down any comments:

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PTO

Section 5: Viewer-paid funding mechanisms – Pay interactivity

43. How appropriate is “pay interactivity” in TV programmes on the following TV channels? (1 = not at all appropriate and 10 = very appropriate)

Terrestrial commercial channels



ITV

Channel 4

five

Other commercial channels – i.e. in the multi-channel environment



Mixed entertainment channels (e.g. Sky One, ITV2, E4, UKTV Gold)

Factual channels (e.g. Discovery, Sky News, UKTV History)

Please write down any comments:

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STOP WRITING!

PTO

Section 5: Viewer-paid funding mechanisms – Pay per view

44. To what extent do you personally approve or disapprove of pay per view television? (1 = strong disapproval and 10 = strong approval)

45. Please explain your score

46. In your opinion, what impact do you think pay per view television has on society? (1 = big negative impact and 10 = big positive impact)

47. Please explain your score

STOP WRITING!

48. How appropriate is pay per view in the following genres? (1 = not at all appropriate and 10 = very appropriate)

News and current affairs	<input type="text"/>	UK Entertainment (including reality, lifestyle, quiz shows)	<input type="text"/>
Sport	<input type="text"/>	Films	<input type="text"/>
US and other imported entertainment and drama	<input type="text"/>	UK Drama	<input type="text"/>
Children's	<input type="text"/>	Arts	<input type="text"/>
Factual (including documentaries, history, science)	<input type="text"/>	Consumer programmes	<input type="text"/>
Religion	<input type="text"/>	Education	<input type="text"/>

Please write down any comments: -----

PTO

Section 5: Viewer-paid funding mechanisms – Pay per view

49. How appropriate is pay per view on the following TV channels?

(1 = not at all appropriate and 10 = very appropriate)

Commercial terrestrial channels	<input type="text"/>	Other commercial channels – i.e. in the multi-channel environment	<input type="text"/>
	↓		↓
ITV	<input type="text"/>	Mixed entertainment channels (e.g. Sky One, ITV2, E4, UKTV Gold)	<input type="text"/>
Channel 4	<input type="text"/>	Factual channels (e.g. Discovery, Sky News, UKTV History)	<input type="text"/>
five	<input type="text"/>		

Please write down any comments:

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STOP WRITING!

50. Please rank these funding mechanisms in order of preference – from 1 to 5

(1 = most preferred, 5 = least preferred)

a) Traditional adverts	<input type="text"/>
b) Sponsorship	<input type="text"/>
c) Prop placement	<input type="text"/>
d) Pay interactivity	<input type="text"/>
e) Pay per view	<input type="text"/>

PTO

Section 6: Advertiser-paid mechanisms in the future

51. To what extent do you personally approve or disapprove of the prospect of the following ways of generating money in the future? (1 = strong disapproval and 10 = strong approval)

- a) More minutes of advertising per hour on terrestrial channels (assume 9 instead of 7 currently)
- b) Background product placement (relevant to the programme and subtle)
- c) Noticeable product placement (noticeable and not necessarily relevant to the programme)
- d) Script product placement (where programme scripts are built around products)
- e) Programmes made by advertisers
- f) Channels that are funded / sponsored by advertisers

Please write down any comments:

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52. Please explain your scores

a) More minutes of advertising per hour on terrestrial channels

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b) Background product placement (relevant to the programme and subtle)

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c) Noticeable product placement (noticeable and not necessarily relevant to the programme)

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PTO

Section 6: Advertiser-paid mechanisms in the future

d) Script product placement (where programme scripts are built around products)

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e) Programmes made by advertisers

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f) Channels that are funded / sponsored by advertisers

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STOP WRITING!

53. In your opinion, what impact do you think the following ways of generating money could have on society in the future? (1 = big negative impact on society and 10 = big positive impact on society)

- a) More minutes of advertising per hour on terrestrial channels (assume 9 instead of 7 currently)
- b) Background product placement (relevant to the programme and subtle)
- c) Noticeable product placement (noticeable and not necessarily relevant to the programme)
- d) Script product placement (where programme scripts are built around products)
- e) Programmes made by advertisers
- f) Channels that are funded / sponsored by advertisers

54. Please explain your scores

a) More minutes of advertising per hour on terrestrial channels

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PTO

Section 6: Advertiser-paid mechanisms in the future

b) Background product placement (relevant to the programme and subtle)

c) Noticeable product placement (noticeable and not necessarily relevant to the programme)

d) Script product placement (where programme scripts are built around products)

e) Programmes made by advertisers

f) Channels that are funded / sponsored by advertisers

STOP WRITING!

PTO

Section 6: Advertiser-paid mechanisms in the future

55. To what extent do you approve or disapprove of the following principles that determine the current rules on what broadcasters and advertisers may or may not do on screen? (1 = strong disapproval and 10 = strong approval)

Clear separation on screen between the editorial (ie. programme) content and the advertising and / or sponsorship material (ie. so that viewers know what is going on)

Editorial independence in the production process (ie. programmes must not be distorted for commercial purposes)

No product placement (ie. advertisers cannot pay to have their products featured in a TV programme)

Please write down any comments:

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STOP WRITING!

56. How appropriate is noticeable product placement (noticeable and not necessarily relevant to the programme) in the following genres? (1 = not at all appropriate and 10 = very appropriate)

News and current affairs UK Entertainment (including reality, lifestyle, quiz shows)

Sport Films

US and other imported entertainment and drama UK Drama

Children's Arts

Factual (including documentaries, history, science) Consumer programmes

Religion Education

Please write down any comments:

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PTO

Section 6: Advertiser-paid mechanisms in the future

57. How appropriate is noticeable product placement (noticeable and not necessarily relevant to the programme) on the following TV channels?
(1 = not at all appropriate and 10 = very appropriate)

Commercial terrestrial channels	<input type="text"/>	Other commercial channels – i.e. in the multi-channel environment	<input type="text"/>
	↓		↓
ITV	<input type="text"/>	Mixed entertainment channels (e.g. Sky One, ITV2, E4, UKTV Gold)	<input type="text"/>
Channel 4	<input type="text"/>	Factual channels (e.g. Discovery, Sky News, UKTV History)	<input type="text"/>
five	<input type="text"/>		

Please write down any comments:

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STOP WRITING!

58. How appropriate is advertiser-funding / sponsoring of the following TV channels?
(1 = not at all appropriate and 10 = very appropriate)

Commercial terrestrial channels	<input type="text"/>	Other commercial channels – i.e. in the multi-channel environment	<input type="text"/>
	↓		↓
ITV	<input type="text"/>	Mixed entertainment channels (e.g. Sky One, ITV2, E4, UKTV Gold)	<input type="text"/>
Channel 4	<input type="text"/>	Factual channels (e.g. Discovery, Sky News, UKTV History)	<input type="text"/>
five	<input type="text"/>		

Please write down any comments:

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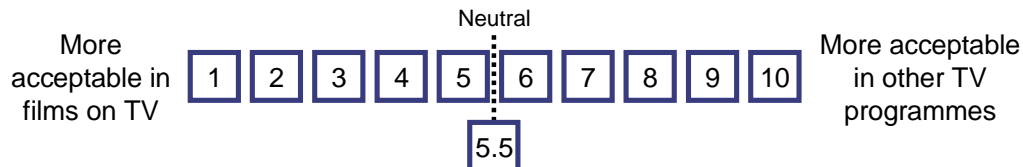
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PTO

Section 6: Advertiser-paid mechanisms in the future

59. Is noticeable product placement (noticeable and not necessarily relevant to the programme) more or less acceptable in films on TV than other programmes on TV? (Please cross the appropriate box)



STOP WRITING!

60. Imagine a world in the future where money earned from traditional advertising is under pressure. In this world, some of the new ways of making money that we have talked about could potentially make up any shortfall.

For each of the new ways to make money, please indicate to what extent you would prefer it to remain disallowed (which some people think could lead to less new programming being made and more repeats being shown) or to be allowed (which some people think could lead to more new programming being made and less repeats being shown)

(1 = strongly prefer it to remain disallowed; and 10 = strongly prefer it to be allowed)

- | | |
|---|----------------------|
| a) More minutes of advertising per hour on terrestrial channels (assume 9 instead of 7 currently) | <input type="text"/> |
| b) Background product placement (relevant to the programme and subtle) | <input type="text"/> |
| c) Noticeable product placement (noticeable and not necessarily relevant to the programme) | <input type="text"/> |
| d) Script product placement (where programme scripts are built around products) | <input type="text"/> |
| e) Programmes made by advertisers | <input type="text"/> |
| f) Channels that are funded / sponsored by advertisers | <input type="text"/> |

Please write down any comments:

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STOP WRITING!

PTO

Section 6: Advertiser-paid mechanisms in the future

61. In light of the preceding discussion, to what extent do you now personally approve or disapprove of the prospect of the following funding mechanisms in the future? (1 = strong disapproval and 10 = strong approval)

- a) More minutes of advertising per hour on terrestrial channels (assume 9 instead of 7 currently)
- b) Background product placement (relevant to the programme and subtle)
- c) Noticeable product placement (noticeable and not necessarily relevant to the programme)
- d) Script product placement (where programme scripts are built around products)
- e) Programmes made by advertisers
- f) Channels that are funded / sponsored by advertisers

Please write down any comments:

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62. Again, in light of the preceding discussion, in your opinion, what impact do you now think the following funding mechanisms could have on society in the future? (1 = big negative impact on society and 10 = big positive impact on society)

- a) More minutes of advertising per hour on terrestrial channels (assume 9 instead of 7 currently)
- b) Background product placement (relevant to the programme and subtle)
- c) Noticeable product placement (noticeable and not necessarily relevant to the programme)
- d) Script product placement (where programme scripts are built around products)
- e) Programmes made by advertisers
- f) Channels that are funded / sponsored by advertisers

Please write down any comments:

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STOP WRITING!

PTO

Section 7: Viewer-paid mechanisms in the future

63. To what extent do you personally approve or disapprove of the prospect of the following funding mechanism in the future? (1 = strong disapproval and 10 = strong approval)

Direct appeals to viewers for funds

64. Please explain your score

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65. In your opinion, what impact do you think the following funding mechanism could have on society in the future? (1 = big negative impact and 10 = big positive impact)

Direct appeals to viewers for funds

66. Please explain your score

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STOP WRITING!

67. To what extent do you approve or disapprove of the following principle that determines the current rules on what broadcasters and advertisers may or may not do on screen? (1 = strong disapproval and 10 = strong approval)

Protection of potentially vulnerable viewers

Please write down any comments:

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STOP WRITING!

PTO

Section 7: Viewer-paid mechanisms in the future

68. How appropriate are direct appeals for funds in programmes in the following genres? (1 = not at all appropriate and 10 = very appropriate)

News and current affairs	<input type="text"/>	UK Entertainment (including reality, lifestyle, quiz shows)	<input type="text"/>
Sport	<input type="text"/>	Films	<input type="text"/>
US and other imported entertainment and drama	<input type="text"/>	UK Drama	<input type="text"/>
Children's	<input type="text"/>	Arts	<input type="text"/>
Factual (including documentaries, history, science)	<input type="text"/>	Consumer programmes	<input type="text"/>
Religion	<input type="text"/>	Education	<input type="text"/>

Please write down any comments:

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69. How appropriate are direct appeals for funds on the following channels? (1 = not at all appropriate and 10 = very appropriate)

Commercial terrestrial channels	<input type="text"/>	Other commercial channels – i.e. in the multi-channel environment	<input type="text"/>
	↓		↓
ITV	<input type="text"/>	Mixed entertainment channels (e.g. Sky One, ITV2, E4, UKTV Gold)	<input type="text"/>
Channel 4	<input type="text"/>	Factual channels (e.g. Discovery, Sky News, UKTV History)	<input type="text"/>
five	<input type="text"/>		

Please write down any comments:

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PTO

Section 7: Viewer-paid mechanisms in the future

70. Again, we would like you to imagine a world in the future where money earned from traditional advertising is under pressure. In this world, some of the new ways of making money that we have talked about could potentially make up any shortfall.

Thinking about direct appeals, please indicate to what extent you would prefer it to remain disallowed (which some people think could lead to less new programming being made and more repeats being shown) or to be allowed (which some people think could lead to more new programming being made and less repeats being shown)

(1 = strongly prefer it to remain disallowed; and 10 = strongly prefer it to be allowed)

Direct appeals to viewers for funds

Please write down any comments:

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STOP WRITING!

PTO

Section 7: Viewer-paid mechanisms in the future

71. In light of the preceding discussion, to what extent do you now personally approve or disapprove of the prospect of direct appeals in the future? (1 = strong disapproval and 10 = strong approval)

Direct appeals to viewers for funds

Please write down any comments:

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72. Again, in light of the preceding discussion, in your opinion, what impact do you now think direct appeals could have on society in the future? (1 = big negative impact on society and 10 = big positive impact on society)

Direct appeals to viewers for funds

Please write down any comments:

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STOP WRITING!

73. Please rank the following potential new ways of generating money in order of acceptability – from 1 to 7 (1 = most acceptable, 7 = least acceptable)

- a) More minutes of advertising per hour on terrestrial channels (assume 9 instead of 7 currently)
- b) Background product placement (relevant to the programme and subtle)
- c) Noticeable product placement (noticeable and not necessarily relevant to the programme)
- d) Script product placement (where programme scripts are built around products)
- e) Programmes made by advertisers
- f) Channels that are funded / sponsored by advertisers
- g) Direct appeals to viewers for funds

PTO

Section 7: Viewer-paid mechanisms in the future

74. Now please rank all existing and potential new ways of generating money in order of acceptability – from 1 to 12 (1 = most acceptable, 12 = least acceptable)

- a) More minutes of advertising per hour on terrestrial channels (assume 9 instead of 7 currently)
- b) Background product placement (relevant to the programme and subtle)
- c) Noticeable product placement (noticeable and not necessarily relevant to the programme)
- d) Script product placement (where programme scripts are built around products)
- e) Programmes made by advertisers
- f) Channels that are funded / sponsored by advertisers
- g) Direct appeals to viewers for funds
- h) Traditional adverts
- i) Sponsorship
- j) Prop placement
- k) Pay interactivity
- l) Pay per view

STOP WRITING!

75. Thinking about the world in general, how strongly do you agree or disagree with the following statement?

(1 = strongly disagree; and 10 = strongly agree)

“There is too much commercialisation in the world today”

Please write down any comments:

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