# The Public's View 2002

## An ITC/BSC research publication

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Research conducted by

British Market Research Bureau International

ISBN: 0-9544055-0-1

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## SUMMARY

*The Public's View 2002* is the 32nd in a series of annual surveys. This project provides an invaluable picture of trends over the last three decades, mapping some of the main changes in ownership of in-home entertainment and attitudes towards broadcasting.

The report starts with an examination of the growth of in-home entertainment opportunities, and moves on to look at viewing habits and preferences. Attitudes towards regulation and key areas such as the provision of news are discussed, as are views about the way in which programmes are thought to have changed over the years. Respondents are asked about the areas which offend them and those which are considered acceptable, and how children in the home are monitored and guided. The report also looks at the importance of key programme genres in the schedules, as well as attitudes towards advertising. Questions about radio and the internet are recent additions to the survey and the report includes chapters on the findings relating to each of these.

### USE OF NEW TECHNOLOGIES AND SERVICES

- Access to the whole range of communications and home entertainment technologies has continued to grow strongly: items notable for their spread were personal computers (now available to 46% of respondents), internet access (43%) and WAP mobile phones (19%).

- Digital television growth slowed slightly, but multichannel television was now available at home to 51% of people and digital services to 41%.

- Access to all items of new technology was more widespread among younger people (those under 25) and less among those aged 65+. With the exception of video games and satellite television, access was more common among people in higher, compared with lower, social grades. More people with children, than without, had every kind of electronic hardware and especially those providing entertainment.

- Ever higher proportions of children had new technology in their own bedrooms. Among eldest children of primary school age, 55% now had a television, 46% a radio, 30% a VCR and 26% a games console. For those of secondary school age, the figures were higher still: 78% had a television, 69% a radio, 45% a VCR and 40% a games console, while 22% had their own PC.

- There may be evidence of an emerging social divide in access to new technologies. More readers of broadsheet than of tabloid newspapers had a personal computer and access to the internet, for example, but more tabloid than broadsheet readers had almost every other item of new technology.

- Many of the newer services available were being used increasingly by viewers with multichannel television. Some 50% had watched something on a pay-per-view basis (the figure had been 36% in 1999), 41% a film (26% in 1999) and 20% a sporting event (18% in 1999).

- The interactive services available on digital television are still seeking a wider market, however. Of those with such services, 66% said they never used them (62% in 2001), while just 15% said they used them at least once a week (19% in 2001).

- DVD players have shown a significant increase with over a quarter of respondents (27%) saying they owned one, compared with 17% in 2001. For viewing prerecorded material, the DVD is being used as much as the VCR. In 2002, of the 27% of people who had a DVD player, 33% said they used it at least once a week.

- Almost half of all homes with children now had the internet. Frequency of internet access, too, had increased from 35% accessing it daily or almost daily in 2001, to 39% doing so in 2002.

- Perhaps most striking was the increase in home internet access among the 45-64 age group, up from 34% to 46% over the year.

- While the proportion of people with multichannel television has increased steadily for nearly 25 years, the proportion of the remainder who said they had no interest in getting it has remained steady at between three quarters and two thirds. These two trends, together, mean that the proportion who neither have multichannel television nor want it has dropped from 52% in 1999 to 36% in 2002.

**BROADCASTING REGULATION**

- Asked about the purpose of television broadcasting regulation, nearly three-quarters of respondents (74%) said it was to protect children and young people, and nearly a quarter (23%) to protect the public or people in general. About one in 10 (12%) said regulations were to protect 'me as a viewer'.

- The majority of respondents still thought there was the right amount of regulation of television: two-thirds said this about the BBC channels and over half (55%) said this about ITV, Channel 4 and Channel 5. One in five (22%) said there was too little regulation of the BBC, while a slightly higher proportion (32%) said the same about Channels 3-5. Fewer than one in 10 said there was too much regulation of either.

- In the case of channels other than BBC1 and 2 and Channels 3-5, 55% of multichannel viewers said regulation was about right and 21% said it was too little, while 18% said they did not know.

- When it came to opinions about the amount of regulation of television advertising, 65% of viewers said the amount was about right as far as ITV, Channel 4 and Channel 5 were concerned, and a similar proportion (64%) of multichannel viewers said the same for pay TV channels. On the other hand, while 21% said there was too little regulation of advertising on Channels 3-5, only 12% of multichannel viewers said the same of the pay TV channels, with nearly a fifth (19%) saying they did not know.

- Compared with 2001, slightly larger numbers of people did not know who was responsible for regulating the BBC (46%, compared with 42% in 2001), ITV, Channel 4 and Channel 5 (51%, compared with 43%) and pay TV channels (78%, compared with 77%).

## QUALITY AND STANDARDS WITHIN PROGRAMMES

- A new series of questions was asked in 2002 to understand better the way in which respondents thought that programmes had changed over the year. As in previous years, respondents were asked to say whether programmes had got better or worse, or stayed the same across the previous year, without any guidance about the way in which this change was to be judged, that is, whether the judgement was about the quality of programmes or issues like taste and decency. Nearly half of all respondents (47%) said that programmes had got worse, while those saying programmes had remained the same was lower at 40%.

- Such adverse opinions about programmes were expressed more often by older, rather than by younger, people. Among those aged 45+, 58% said programmes had got worse, 8% said they had improved, and 34% said they had stayed about the same. Among those aged 16-44, by contrast, 37% said they had got worse, 17% that they had improved, and 45% that they had stayed about the same.

- Respondents were then asked questions, for the first time in 2002, about the way in which these changes might be judged. First, they were asked about *'the quality of programmes on television'*. Some 19% said quality had improved, 32% that it had got worse, and 48% said it had stayed about the same.

- When asked specifically about *'standards of taste and decency of programmes on television'* (again, a new question in 2002), 5% thought they had improved, 55% thought they had got worse, and 38% thought they had stayed the same.

- The replies of older and younger people to this question showed even greater differences. The percentages of people aged over 44 saying that, in terms of taste and decency, programmes had improved, got worse, or had stayed the same were 2%, 73% and 24% respectively, while the equivalent figures for those under 45 were 7%, 37% and 52%.

- The proportion of people who said that they had personally seen or heard things on television which they found offensive (42%) was in line with the findings over many years.

- Variations by channel, too, were in line with findings for earlier years. In 2002, ITV was more likely than BBC1 to be named as a channel carrying offensive material (45% compared with 37%), as was Channel 4 (53%) when compared with BBC2 (24%).

- There were differences between the analogue terrestrial channels in terms of the type of offence caused. In 2002, there were significant increases in swearing and sex as causes of offence on BBC1 and Channel 4; in swearing on ITV; and in swearing and violence on Channel 5.

- When asked to comment on the amount of coverage of standards issues on television, 61% of respondents said there was too much intrusion into people's private lives, while 58% said there was too much violence and a similar proportion (56%) said the same of swearing and offensive language. While those aged over 45 were more likely than younger respondents to say there was too much of all issues of taste and decency, it is notable that the difference is far less marked with 'intrusion into people's private lives' where 58% of respondents aged 16-44 said there was too much compared with 61% of the sample as a whole.

**REACTIONS TO OFFENSIVE MATERIAL**

- Viewers, it would appear, exercise a degree of self-regulation when they encounter material they do not like. Asked what they do when they come across offensive material, the majority of people said they either switch off or change channels, although some (14%) said they simply carried on watching and a handful (5%) said they complained.

- As in former years, most people (65%) said that responsibility for what children see on television falls mainly on parents, with 27% saying it should be shared between parents and broadcasters, and 8% saying that mainly it should be down to the broadcasters.

- The 9pm watershed was almost universally known, and in 2002 most people (64%) said that the time was right, although approaching a third (29%) said that 9pm was too early and a small number (6%) said it was too late.

- Asked about the dual watershed on certain pay channels, viewers in multichannel homes were largely supportive. Such dissent as was expressed appeared to favour a later hour for both the 8pm and the 10pm watersheds.

- Parents were asked whether, in the previous year, they had actively prevented their children from watching anything on television: 59% said that they had, and 40% that they had not.

- Among those who said they had done so, the method most often mentioned (by 44%) was turning the television off, followed by changing channels (27%). Both of these strategies had been mentioned by 36% in 2001.

- Multichannel viewers were asked whether they were aware of systems for blocking access to certain channels and 64% said that they were.

- Among the multichannel viewers aware of blocking mechanisms, however, only 21% said that they used the systems, although the proportion rose to 34% among people with children in their household and to 43% among people with a child aged 10-15.

**VIEWS ABOUT TELEVISION CONTENT**

- Asked which television channel they would have if they could have only one, 34% said BBC1 and 27% said ITV, whereas in 2000, 30% said BBC1 and 41% said ITV. Only among young people was ITV chosen by as many as chose BBC1 (21%), while more younger people than the average (14%) chose Channel 4 and fewer (3%) BBC2.

- Respondents were asked about their own personal level of interest in 11 genres of programming on television, and then about the importance they attached to each genre being included in the mix available on BBC1 and ITV, as part of their public service remit.

- News was in a league of its own, accorded highest priority in both importance for public service and in personal interest.

- Current affairs, factual, children's and educational programmes were seen to have core public service attributes. Drama, regional, entertainment and sport, on the other hand, were regarded as interesting and enjoyable, achieving high personal interest scores, rather than being seen as central to a public service remit.

- Respondents were asked how often they believed that each of five genres of factual programmes provided information which was accurate. Equal, in first place, were wildlife programmes and news programmes (89% said they were accurate all or most of the time), followed by current affairs (69%) and dramatised reconstructions (68%), with documentaries coming fifth (59%).

- A similar question was asked about three types of factual programmes in terms of their portrayal of individuals and the situations they are in. 'Docusoaps' were thought to be honest always, or for most of the time, by 42% of respondents, shows with 'real people in new situations' (such as *Castaway* or *Big Brother*) by 20% and daytime chat shows by only 9%.

- Across the years 1979-1995, the survey found that an average of 27% of people thought programmes on BBC1 'tended to favour' one political party, in particular, but the equivalent figure in 2002 was 16%; for ITV the historic average was 14% and in 2002 it was 3%. Over the same period, 16% of respondents perceived bias on BBC2, compared with 6% in 2002, and while 10% had seen bias on Channel 4, the number in 2002 was 2%. Just 1% said that programmes on Channel 5 tended to favour one party.

**NEWS**

- In respect of world news, an unprecedented number of respondents (79%) said television provided their main source of news, while the number saying newspapers (9%) hit a record low, and the proportion naming radio as their main source of world news (8%) remained roughly steady compared with the 30-year trends.

- The number of people saying that television provided their main source of local news reached an all-time high of 48%. The proportion had been less than 20% until the end of the 1980s, and has risen consistently since that time, with lower figures found only in 2000 and 2001. Newspapers, on the other hand, were named as the main source of local news by only 32% of people in 2002, down from between 50% and 60% prior to the 1990s.

- Respondents in Scotland, Wales and Northern Ireland were asked to name what was the main source of news about their own separate countries and, again, television was clearly in the lead. In Scotland it was named by 69% (compared with 18% saying newspapers), in Wales by 68% (compared with 14% saying newspapers), and in Northern Ireland by 69% (compared with 8% saying newspapers, although more – 17% – said radio).

**ATTITUDES TO ADVERTISING**

- Attitudes to advertising remained largely unchanged from previous years.
- Humour was the main aspect liked about advertising (42%) and the main dislikes (each mentioned by 24%) were: the way that advertisements interrupt programmes, that some are silly and that they can be repetitive.
- Awareness of promotional messages, other than spot advertising, was up year-on-year, and 91% (compared with 86% in 2001) said they were aware of sponsored programmes, 75% were aware of programme trailers (compared with 66% last year) and 62% were aware of channel promotions (50% in 2001).
- Opinions about the amount of advertising were roughly in line with that found in earlier years. Of terrestrial viewers, 55% thought that the current amount was acceptable, while a similar proportion (54%) of multichannel viewers said the same about the terrestrial channels. Multichannel viewers were slightly less likely to say this about the amount of advertising on non-terrestrial channels (47%).
- Respondents were asked how often they found advertisements gave them an impression of products or services which they later found to be wrong or misleading. Roughly in line with the findings of previous years, 18% said it happened often or very often, 29% that it happened sometimes and a majority (53%) said it happened only rarely or never.
- A similar question about advertisements which were thought offensive found that 6% encountered such advertising often or very often, 13% sometimes and 81% rarely or never.

**RADIO**

- Some 57% of the sample claimed to listen to the radio every day.
- While 58% of respondents said they had not been personally offended by anything they had seen or heard on television, asked a similar question in respect of radio, 87% said they had not.
- Among those few who had been offended by something on radio, the most common response (38%) was to do nothing and carry on listening, followed by (36%) switching off.

## THE INTERNET

- Internet access had increased in 2002 to 52% of respondents, from 47% in 2001, with 44% accessing it at home and 16% at work.

- The three sub-groups which reported the most extensive internet access were people in social grades AB (71%), people aged 16-24 (76%), and non-white people (78%).

- Reported use of the internet was mainly for email (64%), research and looking for information (58%), followed by travel and looking for holiday information (26%) and shopping and information for shopping (24%).

- Asked to choose between two regulatory options, a majority of respondents (72%), said they believed that, *'There should be some way of making sure harmful things are removed from the internet'* and only 21% said they thought that, *'Everybody should be allowed to choose for themselves what material they want to look at'*.

- Among those respondents with internet access, knowledge of ways of controlling access to certain sites was more widespread in 2002: 54% knew about software blocking access to sites containing specific words or pictures (51% in 2001 and 26% in 2000); 53% knew about controls offered by Internet Service Providers (40% in 2001 and 36% in 2000); 38% knew of sites where you have to give your age (34% in 2001 and 24% in 2000).

- Among those with internet access at home, 25% said they had internet filtering tools in operation, a proportion which rose to 33% among those with children at home.

# 1 THE SAMPLE

*The Public's View 2002* reports the findings of the 32nd in a series of annual surveys commissioned by the Independent Television Commission (ITC) and the bodies which preceded it. Each survey has included the same core questions, but it has changed in minor ways in successive years. In 2001, for the first time, it was commissioned jointly by the ITC and the Broadcasting Standards Commission (BSC), in anticipation of Ofcom, the body that will bring together the five communications regulators into a single organisation, since the ITC and the BSC alike are concerned with content regulation. And, because the remit of the BSC includes radio, the 2001 survey contained a section on radio for the first time since the days when, before the formation of the Radio Authority, the Independent Broadcasting Authority (IBA) had responsibility for commercial radio as well as for commercial television.

Fieldwork for the 2001 survey began shortly after transmission of the controversial programme in the Channel 4 series *Brass Eye*, which satirised the media's handling of paedophilia. The programme was the subject of extensive and largely negative media coverage at the time and there was some concern that the findings of the 2001 survey, especially those concerned with offence, standards, etc, could have been distorted by the publicity. In an attempt to minimise such effects in the event of comparably controversial output in 2002, it was decided to conduct fieldwork for the 2002 survey in two parts. The first part of fieldwork was undertaken between 25 March and 18 April and the second between 26 August and 15 September.

The 2002 survey was conducted for the ITC and BSC by BMRB International, and the appendices contain details of the method.[1] It employed face-to-face interviews, conducted in respondents' homes, and over both halves of fieldwork a sample of 1,191 adults aged 16+ was interviewed and then weighted to be representative of the UK. The data presented here are based on the weighted sample.

The first question in the survey established how many television sets there were in the home: the majority (81%) had two or more sets (Table 1). (Here, as throughout, it must be noted that the data are for individuals. This does not mean that 19% of households have only a single set, but that 19% of individuals live in households with a single set.) Multiple ownership has continued to increase – from 76% in 2001 and 70% in 2000. The number of sets in the home varied slightly by age and by social grade, with rather more older people and people in higher social grades having only a single set. However, the number of sets owned by those aged 65+ has increased, with 73% having more than one set in 2002 compared with 60% in 2001.

[1]See Appendix I for technical details.

TABLE 1 **NUMBER OF TELEVISION SETS AT HOME**

| | Total | | | | Age |
|---|---|---|---|---|---|
| | | 16–24 | 25–44 | 45–64 | 65+ |
| | **%** | % | % | % | % |
| One | **19** | 13 | 18 | 16 | 27 |
| Two | **36** | 32 | 36 | 32 | 47 |
| Three | **27** | 30 | 28 | 28 | 20 |
| Four | **12** | 18 | 13 | 14 | 3 |
| Five+ | **6** | 8 | 6 | 10 | 1 |

*Base: All respondents*

The next questions were about amount of viewing: *'And during an average week, on how many days do you personally watch television?'* followed by, *'On a day when you personally watch television, for about how many hours do you view on average?'*. As found in previous years, the great majority of people reported watching television every day of the week and were doing so for more than an hour, but for less than five hours. As seen from Tables 2 and 3, weight of viewing increased with age, again a familiar finding.

TABLE 2 **NUMBER OF DAYS WATCHING TELEVISION IN AN AVERAGE WEEK**

| | Total | | | | Age |
|---|---|---|---|---|---|
| | | 16–24 | 25–44 | 45–64 | 65+ |
| | **%** | % | % | % | % |
| 7 days | **85** | 80 | 82 | 87 | 93 |
| 6 days | **4** | 6 | 4 | 4 | 3 |
| 5 days | **4** | 4 | 7 | 3 | 1 |
| 3 or 4 days | **4** | 9 | 3 | 4 | 2 |
| 1 or 2 days | **2** | 2 | 4 | 1 | * |
| Less than once a week | ***** | – | * | 1 | – |

*Base: All respondents*
*Note: * = Less than 0.5%*

TABLE 3 **AVERAGE NUMBER OF HOURS A DAY WATCHING TELEVISION**

| | Total | | | | Age |
|---|---|---|---|---|---|
| | | 16–24 | 25–44 | 45–64 | 65+ |
| | **%** | % | % | % | % |
| Less than one hour | **3** | 4 | 4 | 1 | 1 |
| 1–2 | **13** | 18 | 14 | 9 | 15 |
| 2–3 | **24** | 24 | 27 | 26 | 16 |
| 3–4 | **23** | 21 | 23 | 26 | 21 |
| 4–5 | **14** | 8 | 13 | 17 | 16 |
| 5–6 | **11** | 8 | 11 | 8 | 17 |
| 6–7 | **4** | 4 | 2 | 5 | 4 |
| 7+ | **8** | 13 | 6 | 7 | 8 |

*Base: All respondents*

Tabloid newspaper readers were heavier viewers than broadsheet readers: 90% of tabloid readers watched television seven days a week, compared with only 72% of broadsheet readers. Of tabloid readers, 64% said they watched for 3+ hours a day compared with 38% of broadsheet readers. A consistent pattern was found with television ownership: 85% of tabloid readers, compared with 72% of broadsheet readers, said there was more than one television set in their house. The data from the 2001 survey displayed similar patterns.

# 2 TECHNOLOGY IN THE HOME

The next set of questions asked about home entertainment equipment: *'And which of the following do you, or does anyone in your household, have in your home at the moment?'*. Then 20 items were read out, and Table 4 shows the eight which were mentioned most frequently in the 2002 survey, ranked in order of mentions, together with figures for the same items of technology for last year and for 10 and for 14 years ago, while Table 5 gives the full data for each year 1992-2002.

- The great majority of people, 87%, had a VCR at home, which was the same figure as in 2001 and not dramatically higher than was found 10 years ago. VCR ownership appears to have stabilised (possibly reflecting the growth in DVD penetration) and the VCR was the only one of the eight most frequently mentioned items for which penetration had not increased since 2001.

- Slightly fewer, 84%, had a teletext set, up 6% on the previous year which was the first increase in penetration since 1998.

- The personal computer came next in rank order – nearly half (46%) of respondents had one in their homes. The proportion of respondents with a PC at home was up 7% compared with 2001, a continuing increase since 2000.

- Ownership of a television with stereo sound continued to rise – to 46% in 2002, from 40% in 2001.

TABLE 4 **ENTERTAINMENT EQUIPMENT IN THE HOME**

| | 1988 % | 1992 % | 2001 % | **2002 %** |
|---|---|---|---|---|
| Video recorder | 58 | 77 | 87 | **87** |
| Teletext | 25 | 46 | 78 | **84** |
| Personal computer | 18 | 30 | 39 | **46** |
| NICAM stereo television | n/a | 6 | 40 | **46** |
| Computer with internet access | n/a | n/a | 35 | **43** |
| Video games | 10 | 17 | 27 | **32** |
| Satellite television dish | * | 10 | 27 | **30** |
| DVD | n/a | n/a | 17 | **27** |
| **None of these** | 33 | 17 | 5 | **2** |

*Base: All respondents*
*Notes: n/a = not asked*
** = less than 0.5%*

- Ownership of a computer with internet access also continued to increase, to 43% in 2002. However, the rate of growth slowed down. The penetration of 35% in 2001 had been nearly double that of 18% in 2000. (Respondents were not asked about broadband in the 2002 survey. However, published figures from Oftel suggest that over one million people subscribed to broadband in 2002 – via DSL, cable modems or satellite – while 7% of internet homes have access via a broadband connection.)

- Nearly a third of respondents, 32%, had video games in their homes, the proportion having grown gradually year-on-year.

- Nearly a third (30%) had a satellite dish, analogue or digital, for television reception, a small increase on 2001 (27%).

- Eighth in the rank order was *'A DVD or Digital Versatile Disc player that is viewed through a television or computer'* which 27% of respondents had at home. Its growth has been rapid. In 2000, only 5% had a DVD and by 2001, this had grown to 17%.

Also of interest is the decline over time in the proportion of respondents saying they had *'None of these'* when the list of home entertainment items was read out. It was a mere 2% in 2002, while it had been 5% in 2001, 17% in 1992, and 33% in 1988 – reflecting a significant growth in the home entertainment market generally.[2]

### TABLE 5 **ENTERTAINMENT EQUIPMENT IN THE HOME**

| | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | **2002** |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | % | % | % | % | % | % | % | % | % | % | **%** |
| Video recorder | 77 | 80 | 83 | 84 | 87 | 88 | 85 | 87 | 82 | 87 | **87** |
| Teletext | 46 | 49 | 55 | 60 | 67 | 69 | 73 | 78 | 78 | 78 | **84** |
| Personal computer | 30 | 29 | 29 | 27 | 29 | 31 | 28 | 31 | 29 | 39 | **46** |
| NICAM stereo television | 6 | 7 | 10 | 10 | 13 | 15 | 22 | 36 | 39 | 40 | **46** |
| Computer with internet | n/a | n/a | n/a | n/a | 3 | 5 | 8 | 13 | 18 | 35 | **43** |
| Video games | 17 | 20 | 23 | 23 | 24 | 26 | 30 | 33 | 28 | 27 | **32** |
| Satellite television dish | 10 | 12 | 14 | 15 | 18 | 20 | 20 | 21 | 21 | 27 | **30** |
| DVD | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 5 | 17 | **27** |
| Widescreen television | n/a | n/a | 7 | 6 | 5 | 5 | 6 | 8 | 16 | 21 | **27** |
| Video camera | 9 | 10 | 11 | 14 | 14 | 14 | 16 | 15 | 17 | 24 | **25** |
| WAP mobile phone with internet access (personal or business) | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 2 | 11 | **19** |
| Cable television | 3 | 3 | 7 | 6 | 7 | 11 | 13 | 13 | 14 | 19 | **17** |
| Minidisc player | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 9 | 13 | **16** |
| Cable phone | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 10 | 14 | **15** |
| Computer with television/video | n/a | n/a | n/a | n/a | n/a | n/a | 9 | 10 | 7 | 11 | **13** |
| Digital radio[3] | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | **7** |
| ITV Digital | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 2 | 5 | **6** |
| MP3 player | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 2 | 3 | **6** |
| Television via phone line (eg Home Choice) | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 3 | **2** |
| Personal video recorder such as TiVo or Sky+ | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | **2** |

*Base: All respondents*
*Note: n/a = not asked*

[2] Questions were not asked about integrated digital television sets in the 2002 survey, but will be added in subsequent years.
[3] This figure seems high, with published data from the Digital Radio Development Bureau suggesting a penetration level in 2002 of less than 1%. This suggests that respondents may be unclear about the differences between listening to digital radio stations (through a variety of means) and owning a digital radio. These data should be treated with caution.

Trends in the ownership of the remaining 12 items are discussed briefly below.

- A widescreen television set was mentioned by 27%, the same proportion who said they had a DVD, but whereas the availability of DVD has grown rapidly, widescreen sets have become popular rather more slowly. They made their first significant appearance in 1994 and spread steadily until taking off in 2000, when 16% owned one.

- A quarter of respondents said they had a video camera or camcorder. As the figures in Table 5 show, more people have mentioned them each year.

- All the remaining items showed an increase in penetration from 2001 to 2002 with the exception of cable television (at 17% slightly down in 2002 on 2001). Digital radio is one of the newest items of home entertainment, only being introduced into the survey in 2002. It was claimed by 7% of respondents, but it is uncertain if respondents were referring to the hardware or referring to the fact they listened to digital radio stations. Also asked about for the first time were personal video recorders (such as TiVo or Sky+), claimed by 2% of the sample.

It should be noted that ITV Digital, now closed and previously known as ONdigital, was mentioned by 6% of respondents as something they had at home, up slightly from the 2001 figure.

There were considerable variations in access to each item of new technology in homes by age, by social grade, and by the type of newspaper normally read by respondents (Table 6).

TABLE 6 **HOME ENTERTAINMENT EQUIPMENT: BY AGE, SOCIAL GRADE AND NEWSPAPER READERSHIP**

| | Total | | | Age | | Social Grade | | Newspaper readership |
|---|---|---|---|---|---|---|---|---|
| | | 16–24 | 25–64 | 65+ | ABC1 | C2DE | Tabloid | Broadsheet |
| | **%** | % | % | % | % | % | % | % |
| Video recorder | **87** | 89 | 91 | 77 | 89 | 86 | 89 | 83 |
| Teletext | **84** | 85 | 88 | 68 | 85 | 82 | 84 | 80 |
| Personal computer | **46** | 55 | 52 | 19 | 55 | 38 | 44 | 55 |
| NICAM stereo television | **46** | 46 | 51 | 27 | 46 | 46 | 47 | 41 |
| Computer with internet | **43** | 44 | 51 | 13 | 56 | 31 | 39 | 54 |
| Video games | **32** | 56 | 36 | 2 | 30 | 34 | 34 | 20 |
| Satellite television dish | **30** | 43 | 31 | 17 | 26 | 34 | 36 | 22 |
| DVD | **27** | 49 | 29 | 3 | 28 | 25 | 28 | 22 |
| Widescreen television | **27** | 38 | 28 | 13 | 25 | 28 | 29 | 18 |
| Video camera | **25** | 27 | 30 | 9 | 26 | 24 | 25 | 25 |
| WAP mobile phone with internet access | **19** | 31 | 21 | 2 | 23 | 14 | 18 | 18 |
| Cable television | **17** | 20 | 19 | 10 | 18 | 17 | 17 | 11 |
| Minidisc player | **16** | 21 | 16 | 11 | 18 | 14 | 16 | 13 |
| Cable phone | **15** | 14 | 17 | 10 | 17 | 13 | 14 | 9 |
| Computer with television/video | **13** | 18 | 15 | 1 | 17 | 8 | 12 | 10 |
| Digital radio[3] | **7** | 13 | 6 | 3 | 7 | 6 | 7 | 7 |
| ITV Digital | **6** | 6 | 7 | 3 | 5 | 7 | 7 | 5 |
| MP3 player | **6** | 12 | 6 | * | 7 | 4 | 6 | 4 |
| Television via phone line (eg Home Choice) | **2** | 3 | 3 | – | 2 | 2 | 3 | 1 |
| Personal video recorder such as TiVo or Sky+ | **2** | 5 | 2 | – | 2 | 1 | 2 | 1 |

*Base: All respondents*
*Notes: n/a = not asked*
** = less than 0.5%*
*Figures for those saying they read no newspaper are excluded*

[3] This figure seems high, with published data from the Digital Radio Development Bureau suggesting a penetration level in 2002 of less than one per cent. This suggests that respondents may be unclear about the differences between listening to digital radio stations (through a variety of means) and owning a digital radio. These data should be treated with caution.

Age had the greatest effect on the likelihood that a person will have items of new technology at home, especially comparing those aged 16-24, those aged 25-64 and those aged 65+. People in the oldest age group (aged 65+) were less likely to have every single one of the 20 items on the list compared with the total sample. As has been found before, older people are 'technology poor'. At the other end of the age spectrum are the 'technology rich'; adults under 25 years of age were particularly likely to have:

- Personal computer
- Video games
- Satellite television dish
- DVD
- Widescreen television
- WAP phone
- Minidisc player
- Computer with television/video capacity
- Digital radio
- MP3 player.

Those in the higher social grades (ABC1) were more likely to own most items, with particularly high ownership of computer-related items of new technology compared with C2DEs – a personal computer, internet access, and a computer with television/video capability and a WAP mobile phone. Those who were in the group C2DE were more likely to have satellite television.

Newspaper readership, too, had quite a strong effect. Among readers of broadsheet papers, penetration levels were noticeably higher of a computer and of internet access. Tabloid readers were more likely to have video games, satellite television and a widescreen television.

There were some national differences in the prevalence of home entertainment equipment between the nations within the UK; the figures for the most frequently mentioned eight items are given in Table 7.

The figures for England are all close to those for the UK as a whole.

Scotland had the highest ownership levels for a VCR. In comparison, ownership of both a personal computer and a computer with internet access were notably lower than for the UK.

In Northern Ireland, significantly lower proportions had teletext, stereo sound, video games, a personal computer and a DVD; and a very much lower proportion had internet access – 24%, compared with 43% for the UK.

TABLE 7 **HOME ENTERTAINMENT EQUIPMENT: BY NATION**

| | England | Scotland | Wales | N.Ireland | UK total |
|---|---|---|---|---|---|
| | % | % | % | % | **%** |
| Video recorder | 87 | 93 | 82 | 90 | **87** |
| Teletext | 84 | 81 | 81 | 75 | **84** |
| NICAM stereo television | 47 | 41 | 43 | 27 | **46** |
| Personal computer | 47 | 40 | 41 | 36 | **46** |
| Computer with internet | 44 | 35 | 31 | 24 | **43** |
| Video games | 32 | 35 | 31 | 25 | **32** |
| Widescreen television | 26 | 31 | 23 | 28 | **27** |
| DVD | 26 | 31 | 26 | 22 | **27** |

*Base: All respondents*

Comparing the incidence of items of new technology among people with multichannel access with the incidence among those receiving only the five analogue terrestrial channels, there were very substantial differences, as shown by the figures in Table 8. Those in multichannel homes were more likely to own each of the eight most frequently mentioned items than were those in homes with Channels 1-5 only. As was noted in 2001, these differences are mostly the same as those found between those in homes with children and those in homes without children. Homes with children have, as will be shown, a greater likelihood of accessing multichannel television.

TABLE 8 **HOME ENTERTAINMENT EQUIPMENT: BY CHANNEL ACCESS 2001–2002**

| | Multichannel | | Channels 1–5 only | |
|---|---|---|---|---|
| | 2001 | **2002** | 2001 | **2002** |
| | % | **%** | % | **%** |
| Video recorder | 91 | **92** | 82 | **83** |
| Teletext | 88 | **91** | 69 | **76** |
| NICAM stereo television | 52 | **58** | 28 | **34** |
| Video games | 37 | **44** | 16 | **20** |
| Personal computer | 48 | **52** | 31 | **40** |
| Computer with internet | 43 | **52** | 27 | **33** |
| Widescreen television | 30 | **37** | 12 | **16** |
| DVD | 23 | **38** | 10 | **15** |

*Base: All respondents*

Table 9 shows the trend data for people in homes with children, as well as the 2002 data for people in homes without children. As has been found in earlier years, the presence of children increased the likelihood that a respondent will have an item of new technology.

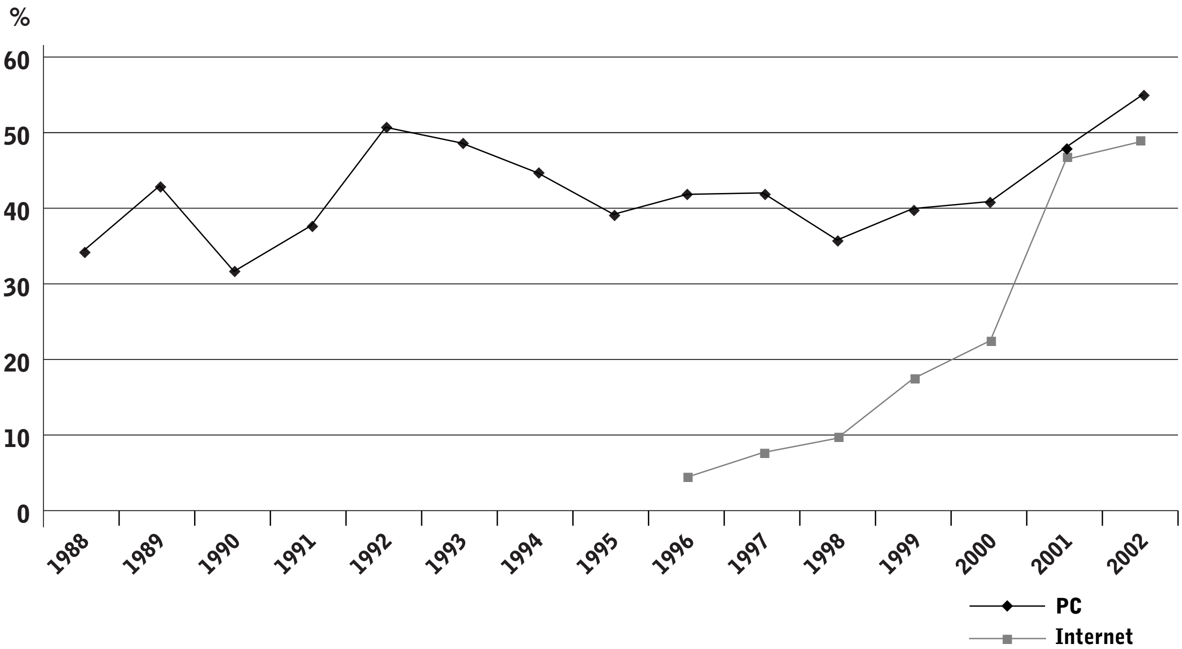
TABLE 9 **HOME ENTERTAINMENT EQUIPMENT: HOUSEHOLDS WITH CHILDREN**

| | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | With children **2002** | No children **2002** |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | % | % | % | % | % | % | % | % | % | % | **%** | **%** |
| Video recorder | 91 | 90 | 94 | 93 | 96 | 94 | 92 | 91 | 86 | 94 | **92** | **85** |
| Teletext | 54 | 53 | 63 | 65 | 74 | 70 | 76 | 80 | 81 | 84 | **88** | **81** |
| NICAM stereo television | 9 | 8 | 12 | 10 | 15 | 15 | 22 | 41 | 47 | 46 | **49** | **44** |
| Video games | 33 | 37 | 45 | 41 | 45 | 50 | 54 | 56 | 52 | 46 | **54** | **20** |
| Personal computer | 51 | 48 | 45 | 39 | 43 | 43 | 36 | 40 | 41 | 47 | **54** | **42** |
| Satellite television dish | 14 | 17 | 19 | 20 | 23 | 24 | 26 | 25 | 28 | 40 | **37** | **26** |
| Cable television | 4 | 3 | 10 | 9 | 10 | 15 | 17 | 19 | 17 | 20 | **19** | **17** |
| Video camera | 14 | 17 | 17 | 21 | 18 | 19 | 26 | 23 | 23 | 34 | **35** | **20** |
| Computer with internet | n/a | n/a | n/a | n/a | 4 | 7 | 10 | 16 | 23 | 46 | **49** | **39** |
| Widescreen television | n/a | n/a | 7 | 6 | 5 | 5 | 7 | 9 | 19 | 24 | **31** | **24** |
| DVD | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 7 | 24 | **36** | **21** |
| Computer with television/video | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 13 | 10 | 16 | **16** | **10** |
| WAP mobile phone | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 2 | 14 | **27** | **14** |

*Base: All respondents*
*Note: n/a = not asked*

A personal computer, and also a computer with internet access, were both found in more homes with children in 2002 than in 2001 and Figure 1 shows the trend data. The penetration of a home computer fluctuated through the 1990s, but started to climb in the new decade. Internet access was measured first in 1996, when it was claimed by 4% of respondents with children, and the figure grew only slowly until 2000, when it seemed that the penetration of both a personal computer and also a computer with internet access were rising, and rising together. The implication is that few people now acquire a computer without also acquiring internet access.

FIGURE 1 **PERSONAL COMPUTER AND INTERNET ACCESS IN HOUSEHOLDS WITH CHILDREN**



After asking about items of new technology in the home, the survey went on to ask: *'And do any of your television sets receive a digital service, which first became available over the last three years?'*. Those respondents who said they did were then asked: *'Is that from Sky via a satellite, from your cable supplier via a cable, from ONdigital through an ordinary aerial or from somewhere else?'*. The replies are summarised in Table 10. At 41%, the proportion of those with digital television was in line with that from the previous year (40%), but the figure for Sky was up from 24% to 28%, while cable and digital terrestrial were down slightly.[4] As before, digital was most popular among the youngest age group, with 50% of those aged 16-24 receiving digital services and least popular among the oldest (21%). And, as last year, the highest take-up was in Wales (up from 42% in 2001 to 47% in 2002) and lowest in Northern Ireland (down from 42% in 2001 to 39%).

TABLE 10 **WHETHER RECEIVE DIGITAL TELEVISION SERVICES**[5]

| | Total | Age | | | | Nation | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | 16–24 | 25–44 | 45–64 | 65+ | England | Scotland | Wales | N.Ireland |
| | **%** | % | % | % | % | % | % | % | % |
| No | **59** | 50 | 56 | 54 | 79 | 59 | 59 | 53 | 61 |
| All yes | **41** | 50 | 44 | 46 | 21 | 41 | 41 | 47 | 39 |
| Yes, satellite | **28** | 39 | 28 | 30 | 14 | 27 | 29 | 37 | 32 |
| Yes, cable | **10** | 10 | 11 | 13 | 4 | 11 | 7 | 7 | 4 |
| Yes, terrestrial | **4** | 3 | 5 | 5 | 3 | 5 | 5 | 4 | 4 |
| Yes, other | * | – | * | – | – | – | – | 1 | – |

*Base: All respondents*
*Note: * = Less than 0.5%*
*Don't knows not shown*

Considering all multichannel reception, including analogue, it was found that the majority (68%) of people with access to more television services than simply Channels 1-5, had only a single multichannel set at home; 18% said they had two, 6% said they had three, and 5% said they had four or more. These figures were all very similar to those found in 2001.

The remaining questions in this section of the interview asked respondents with a child, or children, at home, about them – how many, their sex, their age, and which items of new technology they had in their bedrooms. The sequence of questions was asked about the eldest child, and then repeated, if appropriate, in respect of the second, third and fourth child. A list of items was read out each time:

- Television
- A radio in any form (including radio alarms, radio cassettes and portable radios)
- A satellite, cable or digital television connection
- A video recorder or playback machine
- Video games such as Sega, Nintendo, Sony PlayStation or Microsoft Xbox
- A computer
- Internet access
- None of these.

[4] ONdigital was rebranded as ITV Digital in 2002 and the service was closed down in May 2002, during the period of the fieldwork.
[5] The disparities which occur between Table 10 and Table 5 in respect of claimed access to digital terrestrial services and digital services via a telephone line, while small, suggest there is still market confusion about the platform through which content is delivered.

Table 10a shows the replies in respect of the eldest child. Comparing the 2002 findings with those for 2001, slightly fewer eldest children were reported as having a radio or a video games console in their bedrooms but, overall, there has been a steady increase in the proportions having each item since 1998 and the number of VCRs has doubled since 1999 and, for the first time in 2002, is in more bedrooms than is a games console.

TABLE 10a **EQUIPMENT IN ELDEST CHILD'S BEDROOM: TREND DATA 1998–2002**

| | 1998 % | 1999 % | 2000 % | 2001 % | **2002 %** |
|---|---|---|---|---|---|
| Television | 46 | 53 | 52 | 55 | **57** |
| Radio | n/a | n/a | 41 | 52 | **48** |
| Video recorder | 14 | 14 | 19 | 25 | **32** |
| Video games console | 26 | 28 | 28 | 33 | **28** |
| Personal computer | 8 | 7 | 8 | 10 | **12** |
| Multichannel access | 4 | 4 | 3 | 6 | **6** |
| Internet access | 1 | * | 2 | 3 | **3** |
| None of these | ** | ** | 31 | 29 | **28** |

*Base: All respondents with children in the household*
*Notes: * = Less than 0.5%*
*** Data not available*

Of course, age is a strong influence on what children are likely to have in their room and Table 10b shows the 2002 findings for the eldest and the second child, by three age groups. A majority (55%) of eldest children, even of primary school age, have a television and this is true of second children as well (60%). Indeed, being a second child seems not to affect the chance of having any of the items in their own bedroom. Children of secondary school age are yet more richly endowed with technology, as the table shows.

TABLE 10b **EQUIPMENT IN ELDEST CHILD'S BEDROOM AND BEDROOM OF SECOND CHILD, BY AGE OF CHILD**

| | | | Eldest | | | Second child |
|---|---|---|---|---|---|---|
| | Preschool % | Primary % | Secondary % | Preschool % | Primary % | Secondary % |
| Television | 21 | 55 | 78 | 21 | 60 | 52 |
| Radio | 11 | 46 | 69 | 13 | 49 | 57 |
| Video recorder | 10 | 30 | 45 | 9 | 34 | 29 |
| Video games console | 8 | 26 | 40 | 7 | 29 | 27 |
| Personal computer | – | 7 | 22 | 1 | 8 | 20 |
| Multichannel access | * | 4 | 10 | * | 5 | 3 |
| Internet access | * | 1 | 6 | – | – | 3 |
| None of these | 75 | 20 | 8 | 72 | 24 | 25 |

*Base: All respondents with children in the household*
*Notes: * = Less than 0.5%*

In Table 10c, the sex of the eldest child within each of the three age groups is shown to illustrate differences between the sexes. More boys than girls of preschool age had the various items, although, except in the case of a television, penetration levels were modest. When it comes to children at primary school, however, more girls than boys had a radio (58% compared with 33%) and a VCR (33% compared with 25%), while more boys than girls had a games console (40% compared with 14%), a computer (12% compared with 2%) and multichannel access (7% compared with 2%). There was no difference for television sets. Among children of secondary school age, more boys than girls had a television (84% compared with 72%) and a personal computer (27% compared with 17%) and, in the case of a games console, the difference was substantial, with 64% of boys having one compared with only 19% of girls.

TABLE 10c **EQUIPMENT IN ELDEST CHILD'S BEDROOM, BY AGE AND SEX**

| | Preschool | | Primary | | Secondary | |
|---|---|---|---|---|---|---|
| | Boys | Girls | Boys | Girls | Boys | Girls |
| | % | % | % | % | % | % |
| Television | 26 | 15 | 55 | 55 | 84 | 72 |
| Radio | 15 | 7 | 33 | 58 | 67 | 71 |
| Video recorder | 11 | 8 | 25 | 33 | 45 | 46 |
| Video games console | 9 | 7 | 40 | 14 | 64 | 19 |
| Personal computer | – | – | 12 | 2 | 27 | 17 |
| Multichannel access | 1 | – | 7 | 2 | 8 | 11 |
| Internet access | 1 | – | 3 | – | 7 | 5 |
| None of these | 69 | 81 | 22 | 19 | 1 | 14 |

*Base: All respondents with children in the household*
*Note: * = Less than 0.5%*

# 3 VIEWING HABITS AND PREFERENCES

Having asked about the equipment people have in their homes, the survey went on to look at how people actually used their televisions and, in particular, at the channels they valued and watched. It explored, also, how they used the ancillary equipment and functions, such as teletext, interactive services and recording and playback equipment.

This section of the survey began with the question: *'Thinking of television channels, if you could have **only one** of the television channels you currently receive at home, which one would you choose?'* and respondents were shown a list of 84 channels used in this, and subsequent questions, which is shown in an appendix to this report. Table 11 summarises the replies to this question. Until 2000, ITV was the channel nominated by the largest proportion of viewers. BBC1 drew equal in 2001 and in 2002 it gained a comfortable lead.

The variations between people with multichannel access via different platforms were not large, although cable subscribers were more likely to name analogue terrestrial channels.

TABLE 11 **CHANNEL WOULD CHOOSE IF COULD HAVE ONLY ONE**

| | All respondents | | | | | Analogue terrestrial only | Cable | Satellite | Multichannel Any digital |
|---|---|---|---|---|---|---|---|---|---|
| | 1998 | 1999 | 2000 | 2001 | **2002** | **2002** | **2002** | **2002** | **2002** |
| | % | % | % | % | **%** | **%** | **%** | **%** | **%** |
| BBC1 | 35 | 30 | 30 | 30 | **34** | **41** | **28** | **24** | **26** |
| BBC2 | 5 | 5 | 3 | 8 | **7** | **11** | **4** | **4** | **3** |
| ITV | 40 | 41 | 41 | 30 | **27** | **31** | **24** | **21** | **23** |
| Channel 4 | 5 | 3 | 6 | 6 | **7** | **9** | **8** | **4** | **4** |
| Channel 5 | 3 | 4 | 3 | 3 | **3** | **4** | **1** | **2** | **2** |
| Total analogue terrestrial | 88 | 83 | 82 | 77 | **78** | **96** | **65** | **55** | **58** |
| | | | | | | | | | |
| Sky Sports | 2 | 5 | 4 | 3 | **4** | * | **2** | **10** | **8** |
| Sky One | 1 | 2 | 2 | 4 | **4** | * | **8** | **8** | **8** |
| Sky Movies | 1 | 3 | 4 | 1 | **2** | **1** | **2** | **3** | **3** |
| Discovery | 1 | 1 | 2 | 3 | **2** | **1** | **5** | **4** | **4** |
| E4 | n/a | n/a | n/a | * | * | – | **2** | **1** | **1** |
| Discovery Home & Leisure | n/a | n/a | n/a | * | * | – | **3** | – | – |
| Others | 6 | 4 | 5 | 11 | **8** | **1** | **14** | **16** | **16** |
| Total multichannel | 12 | 16 | 18 | 22 | **20** | **3** | **35** | **42** | **40** |

*Base: All respondents*
*Notes: * = Less than 0.5%*
*n/a = not asked*
*'None of these' and*
*'Don't knows' not shown*

It should be noted that 3% of respondents who received no television services other than the five terrestrial channels nominated satellite and cable delivered services.

As Table 12 shows, there were some differences by age and the lead that BBC1 appeared to have over ITV among the total sample (Table 11) was not universal across the age groups. Among the youngest age group, many fewer named BBC1 (21% compared with 34% in the total sample). In comparison, this group was more likely to name Channel 4, Sky One and Sky Sports. BBC1 had only a modest lead among those aged 25-44 and 65+ and it was only among those aged 45-64 that it was named by many more than was ITV.

TABLE 12 **CHANNEL WOULD CHOOSE IF COULD HAVE ONLY ONE, BY AGE**

| | | | | Age |
|---|---|---|---|---|
| | 16–24 | 25–44 | 45–64 | 65+ |
| | % | % | % | % |
| BBC1 | 21 | 30 | 40 | 38 |
| BBC2 | 3 | 6 | 7 | 13 |
| ITV | 21 | 26 | 26 | 35 |
| C4 (S4C in Wales) | 14 | 8 | 5 | 3 |
| C5 | – | 4 | 3 | 3 |
| Sky One | 8 | 6 | 1 | – |
| Sky Sports | 7 | 4 | 3 | 2 |
| MTV | 6 | – | – | – |
| Trouble | 4 | – | – | – |

*Base: All respondents*
*Notes: * = Less than 0.5%*
*'Other', 'None of these' and 'Don't knows' not shown*

Following the question about the channel respondents would choose if they could have only one, the survey asked, *'The next section is about the channels you watch most frequently. So, which of these channels would you say you personally watch most often?'* and respondents were shown the same list again. They were then asked, *'And which, if any, would you say is your second most watched channel?'* and so on until they had named up to eight channels they watched most often. Table 13 summarises the findings concerning the first four channels respondents named, but including only those channels nominated as watched most often by more than 1% of the sample. The purpose of the question was to establish the channels about which it would be sensible to ask more detailed questions later in the interview, but the findings were not without interest in their own right.

TABLE 13 **CHANNELS WATCHED MOST OFTEN, SECOND, THIRD AND FOURTH MOST OFTEN**

| | Most | Second | Third | Fourth | Most + second + third + fourth All respondents | Most + second + third + fourth Multichannel only |
|---|---|---|---|---|---|---|
| | % | % | % | % | % | % |
| BBC1 | 34 | 30 | 12 | 8 | 84 | 75 |
| ITV | 30 | 24 | 14 | 11 | 79 | 67 |
| Channel 4 | 6 | 7 | 18 | 22 | 53 | 27 |
| BBC2 | 6 | 12 | 18 | 17 | 53 | 29 |
| Sky One | 4 | 3 | 2 | 3 | 12 | 22 |
| Sky Sports | 3 | 2 | 2 | 2 | 9 | 17 |
| Channel 5 | 2 | 5 | 9 | 11 | 27 | 18 |
| Sky Movies | 2 | 2 | 3 | 3 | 10 | 18 |
| Discovery | 2 | 1 | 1 | 1 | 5 | 11 |

*Base: All respondents*

As will be seen, BBC1 was said by 84% of all respondents to be among their four most often watched channels, followed by ITV which was mentioned by 79%. More than half the respondents said that Channel 4 and BBC2 were among their four most watched channels, and more than a quarter included Channel 5. Three-quarters of those in multichannel homes nominated BBC1 while two-thirds mentioned ITV. Far smaller proportions of these multichannel respondents were likely to mention the other terrestrial channels than was true for the total sample, although BBC2 and Channel 4 were each mentioned by over a quarter. Sky One was mentioned by one in five multichannel respondents.

Having asked about normal, off-air viewing, the survey went on to ask about viewing in other ways, in the first place – addressing the question only to respondents with multichannel access – pay-per-view: *'And have you ever watched anything on a pay-per-view basis in your own home? By this I mean where you pay separately to view a specific programme or event?'*. As was found in 2001, pay-per-view use was increasing in 2002 and it was its use for watching films rather than sport that had increased. Half the respondents in the 2002 survey said they had used pay-per-view, while that figure had been 36% in 1999 among those with satellite and cable. Twice as many (41%) had done so to watch a film as had done so to watch sport (20%). Pay-per-view was more likely to have been used by younger, rather than by older people, and by people with children at home, rather than by those without. Table 14 shows the results separately for satellite and for cable and for multichannel digital and for multichannel analogue.

TABLE 14 **WHETHER WATCHING ANYTHING ON A PAY-PER-VIEW BASIS**

| | All satellite | | | All cable | | | Multichannel digital | Multichannel analogue |
|---|---|---|---|---|---|---|---|---|
| | 2000 | 2001 | **2002** | 2000 | 2001 | **2002** | **2002** | **2002** |
| | % | % | **%** | % | % | **%** | **%** | **%** |
| Films | 35 | 42 | **43** | 36 | 40 | **45** | **44** | **32** |
| Sport | 24 | 15 | **25** | 18 | 9 | **14** | **23** | **8** |
| Other | 1 | * | ***** | * | – | **1** | **1** | **1** |
| None | 53 | 51 | **47** | 57 | 57 | **49** | **46** | **66** |

*Base: All multichannel viewers*
*Note: * = Less than 0.5%*

Respondents with access to digital television were asked about their use of interactive services; this seems to be declining slightly, particularly among the younger respondents. In 2001, 19% of respondents said they used them at least once a week, but that figure was down to 15% in 2002, while the proportion saying they never used them was up from 62% to 66%.

On the other hand, there was agreement, rather than disagreement, with the statement: *'Interactive services such as Sky Sports Active and Sky News Active enhance television viewing for the viewer'* (48% agreeing, compared with 25% disagreeing) and these figures were virtually unchanged from 2001.

Teletext penetration rose in 2002 to 84% (Table 5), yet the weight of use of teletext appeared to have stabilised in 2002, compared with 2001 (Table 15). Prior to 2001, there had been a slow decline in its frequent use and a concomitant increase in the proportion of viewers who used it occasionally or hardly ever.

TABLE 15 **USE OF TELETEXT: 1993–2002**

| | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | **2002** |
|---|---|---|---|---|---|---|---|---|---|---|
| | % | % | % | % | % | % | % | % | % | **%** |
| Most days/every day | 44 | 42 | 38 | 38 | 46 | 43 | 38 | 39 | 36 | **36** |
| Occasionally/hardly ever | 39 | 41 | 43 | 46 | 40 | 44 | 48 | 48 | 52 | **52** |
| Never/don't know | 17 | 17 | 19 | 15 | 14 | 12 | 14 | 12 | 11 | **12** |

*Base: All viewers with teletext*

Table 16 gives reported use of teletext by age and by sex, and shows that the most regular users were those aged 25-44, and men. Indeed, as was found last year, regular use was highest (50%) among men aged 25-44.

TABLE 16 **USE OF TELETEXT, BY AGE AND SEX**

| | Total | Age | | | | Sex | |
|---|---|---|---|---|---|---|---|
| | | 16–24 | 25–44 | 45–64 | 65+ | Men | Women |
| | **%** | % | % | % | % | % | % |
| Most days/every day | **36** | 27 | 44 | 32 | 27 | 42 | 30 |
| Occasionally/hardly ever | **52** | 62 | 45 | 56 | 48 | 48 | 56 |
| Never/don't know | **12** | 11 | 10 | 11 | 24 | 10 | 15 |

*Base: All viewers with teletext*

As has been seen from Table 5, the proportion of people who had a video cassette recorder at home appears to have stabilised for the time being at just under 90%. The majority (53%) said they had just one, 31% said they had two, 11% three, and 5% four or more. It was people with children in their household who tended to have multiple VCRs (59% compared with 39% of people without children) and more people with multichannel access had multiple VCRs (56% compared with 35% of people with only Channels 1-5).

While VCR ownership continued to grow, VCR use – both for time-shifting programmes and watching prerecorded material – has displayed a steady decline, as can be seen from the figures in Table 17.

It has been suggested that use of a VCR for time-shift viewing may decline as people acquire multichannel television. The figures do not support this, however, for while 50% of people with only Channels 1-5 said they used a VCR to watch programmes recorded from television at least once a week, the figure was only marginally lower (48%) among those with multichannel television.

TABLE 17 **USE OF VIDEO RECORDER AND DVD PLAYER: 1994–2002**

| | VCR time-shift | | | | | VCR prerecorded | | | | | DVD |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1994 | 1996 | 1998 | 2000 | **2002** | 1994 | 1996 | 1998 | 2000 | **2002** | **2002** |
| | % | % | % | % | **%** | % | % | % | % | **%** | **%** |
| More than once a week | 58 | 51 | 46 | 29 | **35** | 11 | 10 | 9 | 8 | **9** | **17** |
| Once a week | 20 | 18 | 15 | 18 | **14** | 13 | 13 | 12 | 14 | **11** | **16** |
| Less than once a week | 8 | 12 | 17 | 24 | **14** | 37 | 26 | 24 | 24 | **22** | **26** |
| Hardly ever/never | 13 | 18 | 22 | 28 | **37** | 38 | 50 | 53 | 54 | **57** | **42** |

*Base: All with VCR/DVD player in household*
*Note: 'Don't knows' not shown*

An important factor in the decline of VCR use may be the increased use of DVDs. With the rapid spread of DVD players there has been a significant increase in the frequency with which people watch prerecorded material: 33% of those with a DVD player said they used it at least once a week. The figure was higher still (53%) among those aged 16-24 and, again, it was no lower among people with multichannel television, being reported by 34%, compared with 31% of people with only Channels 1-5.

In 2001 the survey found that 50% of the sample had access to only the five free-to-air channels and in 2002 that figure was down marginally to 49%. This suggests that the take-up of multichannel television has slowed substantially in this year.

Those respondents without multichannel television were asked about their level of interest in acquiring it: *'More television channels are available to households by acquiring a satellite dish or through connecting to cable, through an ordinary aerial via ITV Digital, previously known as ONdigital, or even through your phone line via services such as Home Choice. How interested are you in acquiring cable, satellite or digital television channels?'*. They were then read these options: Very interested; Slightly interested; Not that interested; Not at all interested; Don't know.

Table 18 shows the results, simplified by combining the two 'interested' options and the two 'not interested' options. Overall, interest had not changed since 2001, with just over a quarter (27%) claiming to be interested. As the table shows, more younger people and more people with children at home expressed interest, as also did men (32%) compared with women (23%). Among men aged 16-24, more than half (55%) said they were interested.

TABLE 18 **INTEREST IN ACQUIRING MULTICHANNEL TELEVISION**

| | Total | | | Age | | Children in household | |
|---|---|---|---|---|---|---|---|
| | | 16–24 | 25–44 | 45–64 | 65+ | Any | None |
| | **%** | % | % | % | % | % | % |
| Interested | **27** | 48 | 40 | 22 | 8 | 38 | 22 |
| Not interested | **72** | 51 | 59 | 78 | 91 | 62 | 76 |
| Don't know | **1** | * | 1 | * | 1 | – | 1 |

*Base: All without multichannel television*
*Note: * = Less than 0.5%*

Those who had said they were interested in acquiring multichannel television were then asked how they would prefer to do so. As Table 19 shows, in contrast to 2000 and 2001, more people (33%) expressed a preference for cable than for satellite (27%), and the proportion saying they would opt for ITV Digital was down to 17%, undoubtedly affected by the market confusion about digital terrestrial television in 2002, culminating in the closure of ITV Digital in May 2002, which occurred between the two waves of fieldwork.

TABLE 19 **PREFERRED SOURCE OF PAY TV CHANNELS**

| | 2000 | 2001 | **2002** |
|---|---|---|---|
| | % | % | **%** |
| Through a cable connection | 24 | 21 | **33** |
| Through a satellite dish | 37 | 35 | **27** |
| Through an ordinary aerial from ITV Digital, previously known as ONdigital | 26 | 27 | **17** |
| Other | – | 3 | **3** |
| Don't know/no preference | 12 | 14 | **19** |

*Base: All interested in acquiring pay TV channels*

# 4 REGULATION

The next part of the interview was introduced with an open-ended question: *'I am now going to ask you a few questions about the regulation and standards of programmes that appear on television. Programmes on all channels are supposed to follow guidelines as to what can and can't be shown. Why do you think there are these guidelines?'*. No possible answers were suggested, but for respondents who had difficulty answering the question the interviewer added: *'Who do you think these guidelines are aiming to protect?'*. As can be seen from Table 20, most people said that regulation aims to protect children and young people, although a substantial minority thought it was for the benefit of viewers in general. Only a tiny handful specifically mentioned sex, violence and swearing or offensive language as a reason for regulation. Levels of mentions were very similar to those found in 2001.

TABLE 20 **REASONS FOR REGULATING TELEVISION (UNPROMPTED)**

| | % |
|---|---|
| To protect children/young people | 74 |
| To protect the public/viewers in general | 23 |
| To protect me as a viewer | 12 |
| Content control | 9 |
| To protect vulnerable people | 9 |
| Timing of programmes | 3 |
| To control the amount of sex, violence and swearing or offensive language shown on television | 2 |
| To maintain high standards | 1 |
| Other and don't know | 6 |

*Base: All respondents*
*Note: * = Less than 0.5%*

Before going on to the next question, the interviewer explained: *'By regulation of television programmes I mean attempts to protect children, prevent bias and maintain quality and standards on television'*. The survey then asked respondents a linked pair of questions, first in respect of BBC1 and BBC2, then ITV, Channel 4 (S4C in Wales) and Channel 5 and finally of *'Pay television channels such as Sky'*. The first question asked which organisation or organisations were responsible for regulating programmes, and the second whether respondents thought there was too much, too little, or about the right amount of regulation and Table 21 lists the answers given to the first of the pair of questions.

Nearly half of respondents (46%) said they did not know which organisation or organisations were responsible for regulation of BBC1 and BBC2, up slightly on 42% in 2001. The BSC was mentioned by 15% of respondents, the BBC itself by 13%, and 11% said they were aware of a regulatory organisation but could not remember its name, while 7% thought it was the ITC (down from 10% in 2001) and 4% 'the Government'.

When asked about the regulation of programmes on ITV, Channel 4 and Channel 5, slightly more people said they did not know (51% compared with 43% in 2001), but nearly a quarter (24%) named the ITC (down from 29% in the previous year). Fewer respondents (6%), suggested the BSC than had done so when asked about the BBC, and 8% claimed to be aware of such an organisation but could not remember its name.

When it came to ‘pay TV channels’, over three-quarters (78%) said they did not know, while the same proportion as in 2001 said the ITC (6%) and BSC (4%).

TABLE 21 **ORGANISATION(S) RESPONSIBLE FOR REGULATING PROGRAMMES ON BBC1/BBC2, ON ITV/C4 (S4C IN WALES)/C5, AND ON SATELLITE/CABLE/DIGITAL CHANNELS**

| | BBC1/BBC2<br>% | ITV/C4/C5<br>% | Other channels<br>% |
|---|---|---|---|
| BSC (Broadcasting Standards Commission) | 15 | 6 | 4 |
| BBC (British Broadcasting Corporation) | 13 | 1 | 1 |
| Aware of organisation but can’t remember name | 11 | 8 | 3 |
| ITC (Independent Television Commission) | 7 | 24 | 6 |
| Government | 4 | 2 | 2 |
| Oftel (Office of Telecommunications) | 2 | 1 | * |
| The channel/broadcaster/station | 2 | 1 | 4 |
| ASA (Advertising Standards Authority) | 1 | 3 | 1 |
| Can’t remember | 1 | 1 | 1 |
| Mediawatch (formerly National Viewers’ and Listeners’ Association)/Mary Whitehouse | 1 | * | * |
| Trading Standards Office | 1 | 1 | * |
| Complaints programmes on television such as Points of View, Right to Reply and Watchdog | 1 | 1 | * |
| Complaints programmes on the radio such as Feedback | * | * | * |
| ITV companies/ITV Association | * | 3 | * |
| OFT (Office of Fair Trading) | * | * | * |
| Other | 3 | 2 | 2 |
| Don’t know | 46 | 51 | 78 |
| No organisation does this | * | 1 | 1 |
| VLV (Voice of the Listener and Viewer) | – | * | * |

*Base: All respondents*
*Note: * = Less than 0.5%*

When asked about the amount of regulation, more respondents than in 2001 felt this was about right for the BBC channels (65%) and for ITV, Channel 4 and Channel 5 (55%). About one in five thought there was too little regulation of the BBC (22%) and only 9% said there was too much. A slightly higher proportion of respondents (32%) thought there was too little regulation of ITV, Channel 4 and Channel 5.

Far fewer respondents had an opinion about ‘pay TV channels’. Among respondents who received such channels at home, 55% thought there was about the right amount of regulation – the same as the proportion of respondents saying that there was the right amount on ITV, Channel 4 and Channel 5.

TABLE 22 **OPINIONS ABOUT AMOUNT OF REGULATION OF BBC1/BBC2, OF ITV/C4/C5 AND OF OTHER CHANNELS**

| | BBC1/BBC2 | ITV/C4/C5 | Other channels |
|---|---|---|---|
| | % | % | % |
| Too much | 9 | 7 | 3 |
| Too little | 22 | 32 | 18 |
| About right | 65 | 55 | 35 |
| Don't know | 5 | 6 | 43 |

*Base: All respondents*

People in multichannel homes appeared to be somewhat more satisfied with the amount of regulation in general – across all channels – with more saying there was too much regulation and fewer that there was too little, as can be seen from Table 23. These differences are largely explained by the fact that those with only the five free-to-air channels tend to be somewhat older than those with multichannel reception. As will be seen in Chapter 6, older respondents tended to be less content and more critical in their opinions of television content.

TABLE 23 **OPINIONS ABOUT AMOUNT OF REGULATION, BY TYPE OF RECEPTION**

| | BBC1/BBC2 | | ITV/C4/C5 | | Other channels | |
|---|---|---|---|---|---|---|
| | Terrestrial only viewers | Multichannel viewers | Terrestrial only viewers | Multichannel viewers | Terrestrial only viewers | Multichannel viewers |
| | % | % | % | % | % | % |
| Too much | 7 | 11 | 5 | 9 | 2 | 5 |
| Too little | 26 | 17 | 36 | 28 | 15 | 21 |
| About right | 62 | 68 | 53 | 58 | 14 | 55 |
| Don't know | 5 | 4 | 6 | 5 | 69 | 18 |

*Base: Respondents receiving only Channels 1-5 and respondents with multichannel reception*

Having asked about the regulation of television programmes, the survey continued with a pair of questions about advertising: *'So we have talked about programmes. I am now going to ask you a few questions about regulation of the advertising that appears on television.'* A pair of questions, similar to those about programmes, were then asked, first about advertising on ITV, Channel 4 and Channel 5 and then about advertising on 'pay TV channels', following which were questions about the organisation or organisations which someone would contact if they were '*annoyed or upset about the content of an advertisement*', first on ITV, Channel 4 or Channel 5, and then on 'pay TV channels'. The results from these six questions are shown in Tables 24 and 25.

As in 2001, there was a low level of awareness of advertising regulators, with half the respondents saying they did not know. In 2001 the survey had shown that almost equal proportions of viewers named the Advertising Standards Authority (ASA) and the ITC as the organisation they thought responsible for regulating advertising on the three commercial analogue terrestrial channels (16% and 15% respectively). In 2002, the ASA received significantly more mentions (23%) than the ITC (9%).

Even more people (77%) said they did not know when they were asked about the organisation responsible for the regulation of advertising on pay channels, but 11% thought it was the ASA and 3% the ITC.

The pattern of responses was similar when people were asked which organisation they would contact with a complaint about television advertising. In respect of ITV, Channel 4 and Channel 5, rather fewer (18%) named the ASA and 12% said the ITC, while a further 11% said they would contact the channel carrying the advertisement. A significant proportion (40%) said they did not know whom they would contact. Asked the same question in respect of pay channels, more people (60%) said they did not know, while 11% said the ASA and 5% the ITC and 13% said the channel or broadcaster concerned.

TABLE 24 **ORGANISATION(S) RESPONSIBLE FOR REGULATING ADVERTISING ON ITV/C4/C5, AND ON 'PAY TV CHANNELS SUCH AS SKY'**

| | Who regulates TV advertising? | | To whom complain about TV advertising? | |
|---|---|---|---|---|
| | On ITV/C4/C5 % | On pay channels % | On ITV/C4/C5 % | On pay channels % |
| ASA (Advertising Standards Authority) | 23 | 11 | 18 | 11 |
| ITC (Independent Television Commission) | 9 | 3 | 12 | 5 |
| Aware of organisation but can't remember name | 7 | 3 | 6 | 2 |
| BSC (Broadcasting Standards Commission) | 2 | 1 | 5 | 3 |
| Trading Standards Office | 2 | 1 | 2 | 2 |
| Can't remember | 2 | 1 | * | 1 |
| Oftel (Office of Telecommunications) | – | 1 | 1 | * |
| ITV companies/ITV Association | 2 | * | 5 | 1 |
| The channel/broadcaster/station | 1 | 3 | 11 | 13 |
| Government | 1 | * | 1 | 1 |
| OFT (Office of Fair Trading) | * | * | 1 | 1 |
| BBC (British Broadcasting Corporation) | * | * | 1 | * |
| Mediawatch (formerly National Viewers' and Listeners' Association)/Mary Whitehouse | * | * | * | * |
| Complaints programmes on TV such as Points of View, Right to Reply and Watchdog | * | * | 1 | * |
| Complaints programmes on the radio such as Feedback | * | * | * | * |
| VLV (Voice of the Listener and Viewer) | * | – | – | * |
| The Complaints Commission/Complaints Board | – | – | * | – |
| My MP/Parliament | – | – | * | – |
| Other | 2 | 1 | 2 | 3 |
| Don't know | 52 | 77 | 40 | 60 |
| No organisation does this | * | 1 | * | * |

*Base: All respondents*
*Note: * = Less than 0.5%*

The majority of respondents (65%), regardless of whether they had access to multichannel television or not, considered that the amount of regulation of advertising on the commercial channels (analogue terrestrial or pay) was about right. These findings are very similar to those of two years ago (2000). However, in 2001, multichannel viewers were much less likely than terrestrial-only viewers to rate advertising regulation as 'about right'. The data will need to be tracked further to establish a clearer trend. A significant minority of analogue terrestrial-only viewers (21%) felt there was too little regulation on ITV, Channel 4 and Channel 5, while this proportion was far smaller among multichannel viewers at 12%.

TABLE 25 **OPINIONS ABOUT THE AMOUNT OF ADVERTISING REGULATION**

| | Terrestrial-only viewers, about Channels 3–5 | | | Multichannel viewers, about pay TV channels | | |
|---|---|---|---|---|---|---|
| | 2000 | 2001 | **2002** | 2000 | 2001 | **2002** |
| | % | % | **%** | % | % | **%** |
| Too much | 16 | 7 | **7** | 13 | 3 | **5** |
| Too little | 8 | 22 | **21** | 9 | 11 | **12** |
| About right | 69 | 59 | **65** | 63 | 37 | **64** |

# 5 SOURCES OF NEWS

Public opinions about sources of news have been a central part of this survey since it began. In the 2002 survey the same questions were asked as in earlier years, but the order was changed. Instead of starting with world news and then narrowing down to local news, the order was:

1. Local news
2. Scottish/Welsh/Northern Irish news (for people in those countries only)
3. UK news
4. World news.

In addition, new evaluative questions were asked in respect of news about the UK and world news, and about the degree of trust that respondents placed in the various news sources.

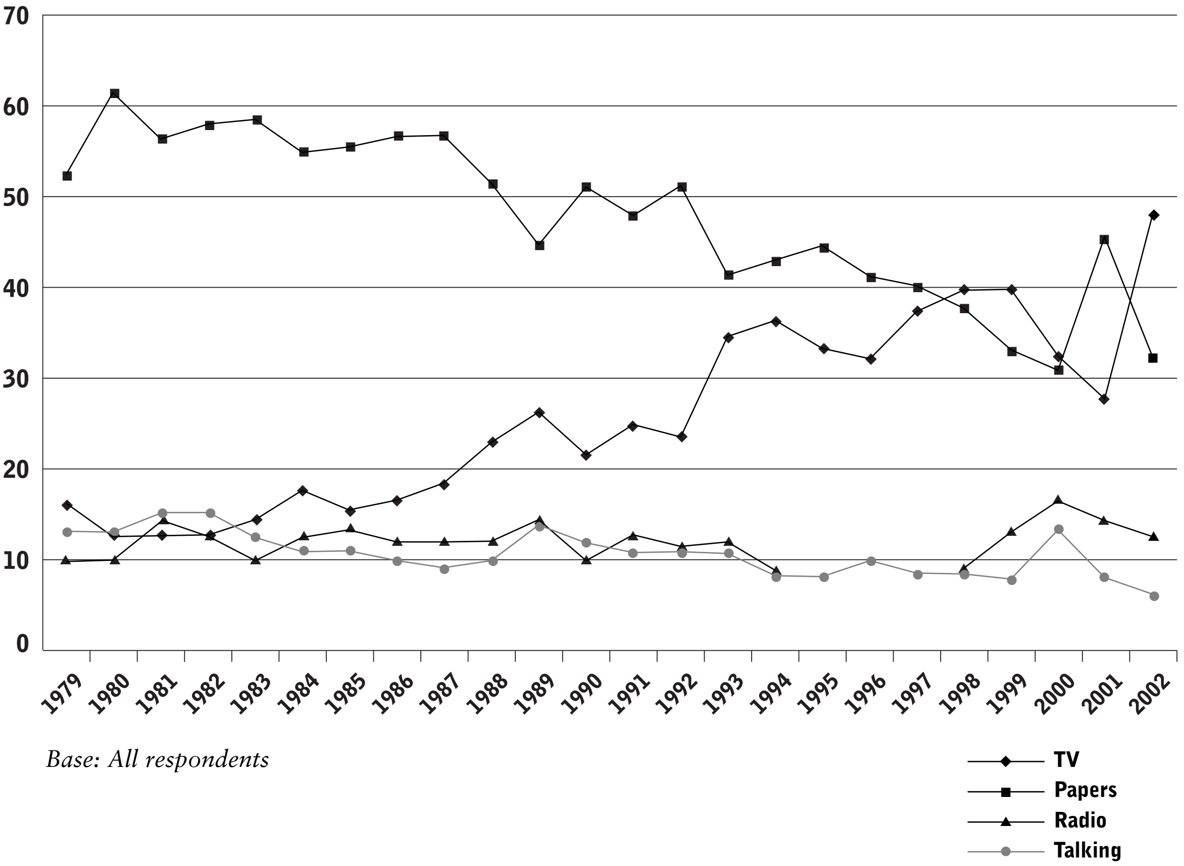
In order to minimise any possible distorting effect of asking questions about news in the context of an interview that focused on television, respondents were asked to *'consider all sources of news such as radio, press and television when answering these questions'*. Then, throughout the questions about news, respondents had in front of them a screen which listed a range of news sources.

The initial question was: *'Can you tell me what is your main source of news about what is going on in your own local area? By this I mean news of local and regional significance'*. Figure 2 plots the findings since 1979. The number of people saying their main source of local news was newspapers decreased steadily over this period, although in 2001 the proportion jumped from 31% to 46%. In 2002, this figure had dropped back to 32%. In comparison, the proportion naming television had increased, from around 15% in the early 1980s, reaching 40% in 1998, when it overtook newspapers in popularity as the main source of local news. In 2002, it was mentioned by nearly half the population (48%), a substantial increase from 2001 (28%).

Radio held its position in 2002 and was mentioned by 13% of respondents as their main source of local news. *'Talking to people'*, which had been mentioned by around 10% for many years, dropped to a new low of just 3%.

There was little variation within these overall figures in 2002. Very similar proportions of people of different ages and of different social grades reported using the various media as their source of local news, the only exception being respondents in Scotland, among whom fewer (29%) named television, while rather more mentioned newspapers (40%) and radio (18%).

% FIGURE 2 **MAIN SOURCE OF LOCAL NEWS: TRENDS 1979–2002**




*Base: All respondents*

A further question, put only to respondents in the devolved nations, was: *'Can you tell me what is your main source of news about what is going on in Scotland/Wales/Northern Ireland?'*.

Television was the main source of news about the nations, mentioned by nearly seven out of 10 respondents in each nation. However, levels of mention in both Wales and Northern Ireland had fallen compared with 2000 (a trend also noted in 2001).

It is worth noting that while Scottish respondents were less likely than the total sample to name television as a main source of local news, this was not the case for news about the Scottish nation.

The main differences between the three countries were the lower proportion of respondents in Northern Ireland who gave newspapers as their main source of news about their own country, and the higher proportion naming radio.

TABLE 26 **MAIN SOURCE OF NEWS ABOUT WHAT IS GOING ON IN EACH COUNTRY**

| | | | Scotland | | | Wales | | | N.Ireland |
|---|---|---|---|---|---|---|---|---|---|
| | 1998 | 2000 | **2002** | 1998 | 2000 | **2002** | 1998 | 2000 | **2002** |
| | % | % | **%** | % | % | **%** | % | % | **%** |
| Television | 54 | 63 | **69** | 61 | 77 | **68** | 60 | 82 | **69** |
| Any newspaper | 22 | 26 | **18** | 24 | 9 | **14** | 20 | 4 | **8** |
| Radio | 11 | 5 | **9** | 8 | 7 | **8** | 6 | 4 | **17** |
| Talking | 6 | 2 | * | 6 | 4 | **1** | 3 | 4 | **–** |
| Teletext | 1 | 2 | **4** | – | * | **5** | 11 | 5 | **6** |

*Base: All viewers in each country*
*Note: 'Don't knows' and 'Other' responses not shown*
** = Less than 0.5%*

All respondents were asked a new question in 2002 about their main source of news about: '*What is going on in the UK*' (Table 27). The figures are given separately for the four countries and it can be seen that respondents in England were less likely to mention television than those elsewhere in the UK. There were no differences between people in terms of age or social grade, but among those who said they were readers of broadsheet newspapers only 50% (compared with 72% for the total sample) said that television was their main source of UK news, while a relatively high proportion (25% compared with 13% of the total sample) named newspapers.

TABLE 27 **MAIN SOURCE OF NEWS ABOUT WHAT IS GOING ON IN THE UK**

| | Total | | | | Respondents in |
|---|---|---|---|---|---|
| | | England | Scotland | Wales | N.Ireland |
| | **%** | % | % | % | % |
| Television | **72** | 70 | 83 | 79 | 84 |
| Any newspaper | **13** | 13 | 10 | 10 | 3 |
| Radio | **11** | 12 | 3 | 6 | 9 |

*Base: All respondents*
*Note: 'Don't knows' and 'Other' responses not shown*

This question was followed by one asked for the first time in the 2002 survey: '*Still thinking about news concerning events in the UK, which of these sources do you trust to present the most fair and unbiased news coverage?*'. Results are shown in Table 28. There was greater trust in television coverage than in radio coverage. Seven out of 10 respondents named television as their most trusted source (at a similar level to the 72% who said television was their main source of UK news). More people (14%) mentioned radio as their most trusted source than named it as their main source (11%). In comparison, only 6% were most likely to trust newspapers and this was noticeably lower than the 13% that claimed newspapers as their main source.

Even among those who said they were readers of broadsheet newspapers, of whom 25% said that a newspaper was their main source of UK news, a fifth said that a newspaper was their most trusted source of news about the UK.

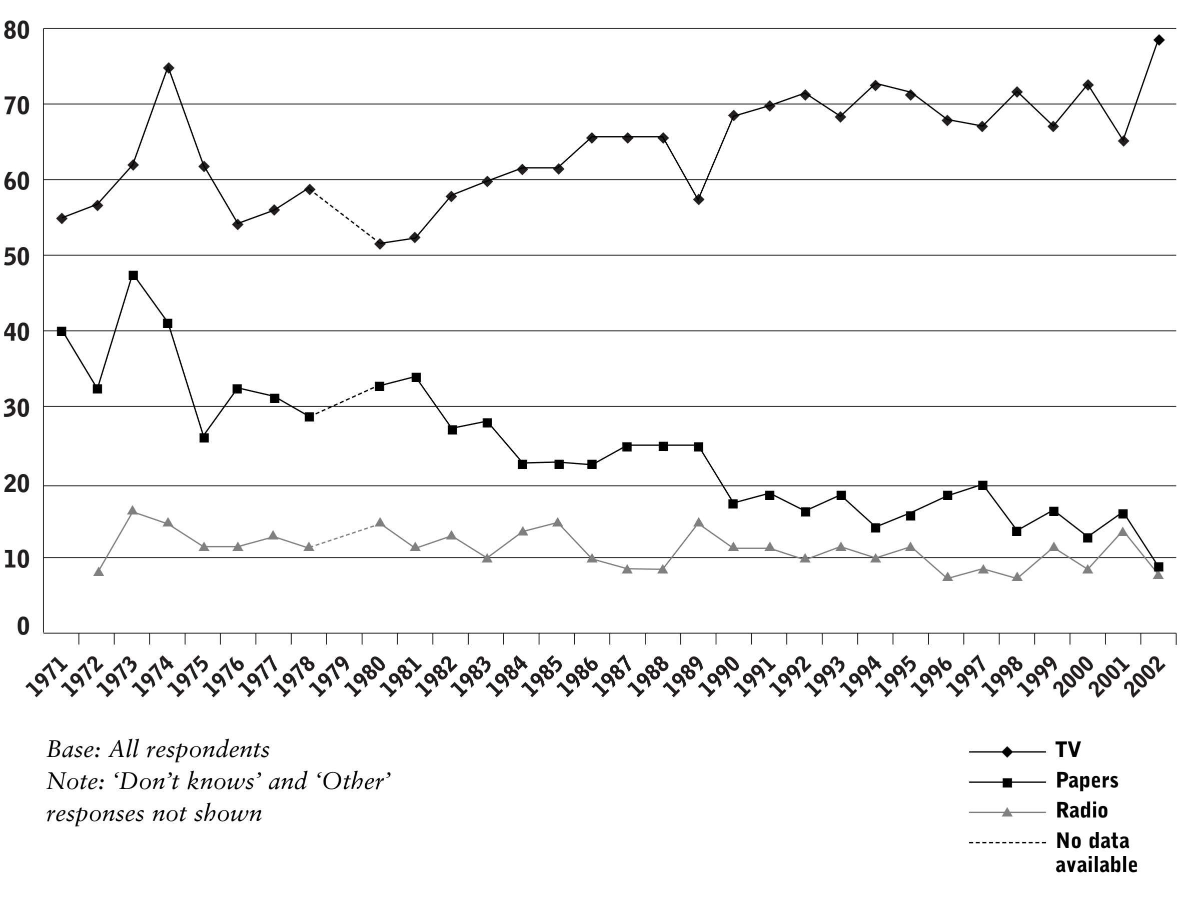
TABLE 28 **SOURCE MOST TRUSTED FOR FAIR AND UNBIASED UK NEWS**

| | Total | | | Newspaper readership |
|---|---|---|---|---|
| | | None | Tabloid | Broadsheet |
| | **%** | % | % | % |
| Television | **70** | 72 | 75 | 38 |
| Any newspaper | **6** | 1 | 5 | 19 |
| Radio | **14** | 15 | 10 | 29 |

*Base: All respondents*
*Note: 'Don't knows' and 'Other' responses not shown*

The final questions on the subject of news sources concerned news about *'what is going on in the world today'*, and Figure 3 shows the trends over 30 years. Television maintained its dominant position and, in 2002, showed a significant increase in those claiming it as a main source of world news, from 66% in 2001 to 79% in 2002. It is possible that the impact of video images of the events of 11 September 2001 accounts for this substantial rise. However, there seems to be a clear upward trend for television. In comparison, the number of respondents naming a newspaper as their main source of world news was down to 9% from 16% in 2001, continuing the long-term downward trend.

FIGURE 3 **MAIN SOURCE OF WORLD NEWS: TRENDS 1971–2002**




*Base: All respondents*
*Note: 'Don't knows' and 'Other' responses not shown*

As Table 29 shows, there were differences in the main source of world news used, driven by age, social grade, newspaper readership and television reception. In particular, broadsheet newspaper readers were much less likely to name television as their main source of world news and more likely to mention it than newspaper or radio. Television was mentioned by higher proportions of respondents in Scotland (86%) and in Northern Ireland (87%).

TABLE 29 **MAIN SOURCE OF WORLD NEWS**

| | Total | Age | | Social grade | | Newspaper readership | | Channel reception | |
|---|---|---|---|---|---|---|---|---|---|
| | | 16–64 | 65+ | ABC1 | C2DE | Tabloid | Broadsheet | Channels 1-5 only | Multichannel |
| | **%** | % | % | % | % | % | % | % | % |
| Television | **79** | 80 | 74 | 73 | 84 | 83 | 56 | 75 | 82 |
| Any newspaper | **9** | 8 | 15 | 11 | 8 | 8 | 25 | 12 | 7 |
| Radio | **8** | 8 | 10 | 11 | 6 | 6 | 15 | 10 | 7 |

*Base: All respondents*
*Note: 'Don't knows' and 'Other' responses not shown*

A follow-up question asked respondents what was their *'second most important source of news about what is going on in the world today'*. Some 15% named television as their second main source, so 94% in total regard the medium as one of the two most important sources of world news. The combined figures for newspapers were 42% and 29% for radio.

Finally, there was a question about the trustworthiness of the various media as sources of world news, equivalent to the evaluative question asked in respect of UK news, and the results were similar to those reported in Table 28 above. The exception was that more readers of a broadsheet newspaper named television as their most trusted source when asked about world news (45%), than when asked about UK news (38%). Conversely, fewer mentioned radio (23% compared with 29% when asked about UK news) and slightly fewer named a newspaper (17% compared with 19%).

Clearly, television has retained its pre-eminent position as a source of news, even as a source of local news. The significance of television as the premier source of news increased as the area covered by the news enlarged, from local, through national, to global. Correspondingly, fewer people named either a newspaper or radio as their main source as the area of coverage expands. This pattern is seen clearly in Table 30.

TABLE 30 **MAIN SOURCES OF NEWS**

| | Area of news coverage | | |
|---|---|---|---|
| | Local news | UK news | World news |
| | % | % | % |
| Television | 48 | 72 | 79 |
| Any newspaper | 32 | 13 | 9 |
| Radio | 13 | 11 | 8 |

*Base: All respondents*

The same pattern is discernible when looking at the media which people in Scotland, Wales and Northern Ireland named when asked about their main sources of local, national, UK and world news. Tables 31-33 summarise the data for each country in turn.

TABLE 31 **MAIN SOURCES OF NEWS FOR PEOPLE IN SCOTLAND**

| | | | | Area of news coverage |
|---|---|---|---|---|
| | Local news | Scottish news | UK news | World news |
| | % | % | % | % |
| Television | 29 | 69 | 83 | 86 |
| Any newspaper | 40 | 18 | 10 | 7 |
| Radio | 18 | 9 | 3 | 3 |

*Base: All respondents in Scotland*

TABLE 32 **MAIN SOURCES OF NEWS FOR PEOPLE IN WALES**

| | | | | Area of news coverage |
|---|---|---|---|---|
| | Local news | Welsh news | UK news | World news |
| | % | % | % | % |
| Television | 49 | 68 | 79 | 78 |
| Any newspaper | 31 | 14 | 10 | 8 |
| Radio | 12 | 8 | 6 | 8 |

*Base: All respondents in Wales*

TABLE 33 **MAIN SOURCES OF NEWS FOR PEOPLE IN NORTHERN IRELAND**

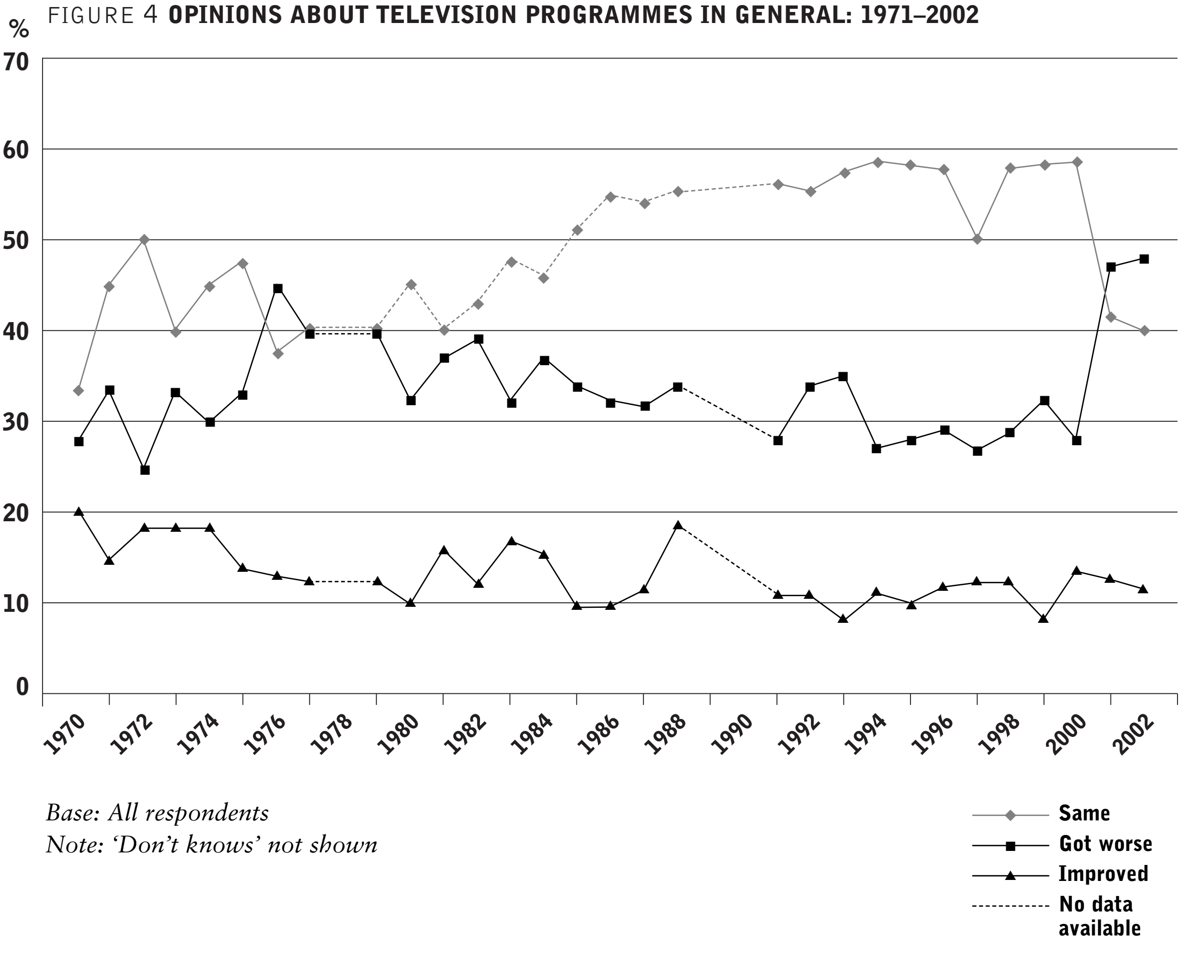
| | | | | Area of news coverage |
|---|---|---|---|---|
| | Local news | N.Irish news | UK news | World news |
| | % | % | % | % |
| Television | 53 | 69 | 84 | 87 |
| Any newspaper | 25 | 8 | 3 | 3 |
| Radio | 13 | 17 | 9 | 7 |

*Base: All respondents in Northern Ireland*

# 6 QUALITY AND STANDARDS WITHIN PROGRAMMES

After the section of the survey which looked at sources of news, the interviewer introduced the next sequence of questions: *'The next section is about the actual content of programmes on television'* and asked the first, very general, question: *'Do you feel that over the past year, television programmes have improved, got worse, or stayed about the same?'*. Figure 4 shows that the results in 2001 marked a sharp change from the pattern which had remained fairly stable since the early 1980s. The proportion saying programmes had got worse increased from 28% to 46% in 2001, while the number saying they had stayed about the same dropped by a similar amount, from 59% to 40%. The 2002 data confirm this sharp drop.

FIGURE 4 **OPINIONS ABOUT TELEVISION PROGRAMMES IN GENERAL: 1971–2002**




*Base: All respondents*
*Note: 'Don't knows' not shown*

Opinions about programmes varied by age, in particular, with older respondents being the most critical. Elderly men were especially likely to say that programmes had got worse (63% of men aged 65+).

Opinions about programmes also appeared to be related to the channels people watched most often. BBC viewers were more likely to make critical judgements and viewers of non-terrestrial channels were the most positive in their judgements.

TABLE 34 **OPINIONS ABOUT ALL TELEVISION PROGRAMMES, BY AGE AND BY CHANNELS MOST WATCHED**

| | Total | Age | | Channels most watched | | |
|---|---|---|---|---|---|---|
| | | 16–44 | 45+ | BBC | ITV/C4/C5 | Additional channels |
| | **%** | % | % | % | % | % |
| Got worse | **47** | 37 | 58 | 51 | 46 | 39 |
| Improved | **12** | 17 | 8 | 7 | 13 | 22 |
| Stayed the same | **40** | 45 | 34 | 40 | 40 | 39 |

*Base: All respondents*

The survey went on to ask those respondents who had said that programmes had got worse over the past year to say in what way they had got worse and Table 35 summarises the unprompted answers that were received. As has been found, year after year, the most common complaint concerned the number of repeats (mentioned by nearly half of this sub-sample). Younger respondents (aged 16-44) were more likely to complain about repeats than were those aged 45+.

The other quality-related issue was *'not enough quality'* mentioned by nearly one-fifth of this sample, an increase of six percentage points over 2001. The data show that those aged 25-44 were more likely to say there was not enough quality (20% in 2002, compared with 14% in 2001), as were those aged 45-64 (increasing from 11% in 2001 to 21% in 2002).

The data also show a continued rise in the spontaneous mention of standards issues (taste and decency) with over two-thirds of the sample mentioning these. Swearing and offensive language, violence and sex (all more likely to be mentioned by those aged over 65) were each named by around a fifth of those who felt that programmes had got worse.

Table 35 shows also the figures for the two previous years, before which the question was framed too differently to allow year-on-year comparisons. There seemed to be a continued increase in the levels of spontaneous mention of swearing and offensive language, violence, sex and lack of quality.

TABLE 35 **RESPECTS IN WHICH PROGRAMMES HAVE GOT WORSE (UNPROMPTED)**

| | | | Total | | | | Age |
|---|---|---|---|---|---|---|---|
| | 2000 | 2001 | **2002** | 16–24 | 25–44 | 45–64 | 65+ |
| | % | % | **%** | % | % | % | % |
| More repeats | 44 | 51 | **47** | 60 | 55 | 42 | 39 |
| Not enough quality | 16 | 12 | **18** | 8 | 20 | 21 | 14 |
| Not enough variety | 10 | 6 | **7** | 7 | 6 | 8 | 9 |
| All standards issues* | 39 | 58 | **68** | 38 | 43 | 70 | 106 |
| More swearing and offensive language | 18 | 19 | **24** | 11 | 13 | 24 | 42 |
| More violence | 13 | 20 | **23** | 15 | 16 | 27 | 29 |
| More sex | 8 | 19 | **21** | 13 | 13 | 19 | 35 |

*Base: Respondents saying programmes had got worse*
** Respondents are permitted to mention more than one issue and so totals may be greater than 100%*
*Note: Responses given by fewer than 6% of those asked are not shown*

Respondents who had said they thought that programmes had improved in the previous year were asked in what ways they thought they had improved, and the replies to this question over the last three years are given in Table 36. The base sizes (that is, the number of people who said that programmes had improved) were small, so care should be taken when interpreting the figures.

TABLE 36 **RESPECTS IN WHICH PROGRAMMES HAD IMPROVED (UNPROMPTED)**

| | 2000 | 2001 | **2002** |
|---|---|---|---|
| | % | % | **%** |
| Wider range of programmes | 33 | 43 | **46** |
| Improved quality | 39 | 31 | **28** |
| More interesting | 18 | 26 | **20** |
| More/better drama | 11 | 20 | **19** |

*Base: Respondents saying programmes had improved*

It should be noted that the expressions of satisfaction, although based on small numbers, were derived increasingly from satisfaction with the range and diversity of programming content on offer. Table 35, which asked respondents about the way in which programmes had got worse, shows that the responses were centred around standards issues as well as a criticism of repeats.

For the first time, in 2002 the survey went on to separate the two aspects of opinions of programme content: standards issues and programme quality. First, a more specific set of questions was asked about standards of 'taste and decency' (a phrase employed in successive Broadcasting Acts): *'Thinking more specifically about standards of taste and decency of programmes on television. By standards of taste and decency I mean the inclusion of things like swearing, violence and sex on television programmes. So, specifically in terms of standards of taste and decency, do you feel programmes have improved, got worse or stayed about the same over the past year?'*.

TABLE 37 **WHETHER PROGRAMMES HAVE IMPROVED, GOT WORSE, OR STAYED THE SAME IN TERMS OF STANDARDS OF TASTE AND DECENCY**

| | Total | | Age |
|---|---|---|---|
| | | 16–44 | 45+ |
| | **%** | % | % |
| Improved | **5** | 7 | 2 |
| Got worse | **55** | 37 | 73 |
| Stayed about the same | **38** | 52 | 24 |

*Base: All respondents*
*Note: 'Don't knows' not shown*

As seen from Table 37, just over half of all respondents said programmes had got worse in terms of taste and decency, while most others felt that they had stayed the same. Again, there were large differences by age. Whereas 37% of those aged 16-44 said that programmes had got worse, twice as many aged 45+ (73%) expressed that opinion. Of those aged 16-44, 52% said they had stayed about the same, compared with less than half that proportion of people aged 45+ (24%).

Those who had said there has been an improvement in standards in terms of taste and decency, and those who said that standards had got worse, were asked on which channels the changes had occurred, and the answers are summarised in Table 38. Only the five terrestrial channels appeared on both lists of nominated channels. ITV headed the list of improvers (named by 47% of those who had noted improvement) although, interestingly, ITV also received the second most mentions for having got worse. Channel 4 received the most mentions for having got worse.

TABLE 38 **CHANNEL WHICH HAD IMPROVED AND WHICH HAD GOT WORSE IN TERMS OF STANDARDS OF TASTE AND DECENCY**

| | Improved* | Got worse |
|---|---|---|
| Channel | % | % |
| ITV | 47 | 45 |
| BBC1 | 39 | 31 |
| C4 | 36 | 51 |
| BBC2 | 29 | 18 |
| C5 | 23 | 44 |

*Base: Respondents saying (1) standards had improved and (2) standards had got worse*
*Note: Responses made by fewer than 10% of respondents and 'Don't knows' not shown*
** NB: small sample size*

The questions about standards in terms of taste and decency were followed by questions about a different evaluative matter: *'Thinking more specifically about the quality of programmes on television. So, specifically, in terms of quality, do you feel programmes have improved, got worse, or stayed the same over the past year?'*.

In response to this question, 48% said they had stayed the same in terms of quality, 32% said they had got worse, and 19% said they had improved. There were fewer differences between the answers given by various sub-groups within the sample than there had been for the standards issues. The exception were respondents with multichannel analogue television: rather fewer said that quality had got worse (25%) and more said it had improved (28%). Again, men aged 16-24 were more positive and 35% of this sub-group said that quality had improved.

As with changes in terms of taste and decency, those who had said there has been either an improvement or worsening in quality were asked about the channels they had in mind (Table 39). BBC1 and ITV headed the lists of those channels perceived both to have improved and to have got worse in terms of quality in the previous year, although, overall, BBC1 had a more positive image than ITV. It was more likely to be rated as having improved and less likely to be rated as worse than was ITV.

TABLE 39 **CHANNEL WHICH HAD IMPROVED AND WHICH HAD GOT WORSE IN TERMS OF QUALITY**

| Channel | Improved % | Got worse % |
|---|---|---|
| BBC1 | 51 | 51 |
| ITV | 40 | 61 |
| BBC2 | 24 | 32 |
| C4 | 17 | 39 |
| C5 | 8 | 30 |

*Base: Respondents saying (1) standards had improved and (2) standards had got worse*
*Note: 'Don't knows' not shown*

The final questions in this section addressed the matter of perceived political bias on the various channels. Respondents were asked: *'Thinking of the channels you watch nowadays, do you think the programmes on any of them tend to favour any political party?'*. Nearly seven out of 10 respondents (68%) did not perceive any channels as favouring a political party, 13% said they did not know, leaving 19% who perceived political bias. There was little variation in the findings, although more older people reported perceiving bias, as did more readers of broadsheet newspapers.

The 19% who perceived a political bias were asked: '*Which channels show political bias?*'. Table 40 shows the number of respondents who mentioned each of the five terrestrial channels. Less than 0.5% of respondents mentioned any other channel. (It should be noted that respondents could mention bias on more than one channel, and so the figures add up to more than the 19% who saw any bias at all.)

The 2002 results are consistent with those from the previous year. BBC1 was significantly more likely to be mentioned, followed by BBC2. The other three channels were named by fewer than one in 20. Each of these figures is lower than has been found in recent years and lower still than was found in the 1980s and 1990s, an indication of which is given in the first column of figures.

TABLE 40 **PERCEIVED POLITICAL BIAS**

| | Historic average | 1999 | 2000 | 2001 | **2002** |
|---|---|---|---|---|---|
| | % | % | % | % | **%** |
| BBC1 | 27 | 20 | 25 | 14 | **16** |
| BBC2 | 16 | 14 | 19 | 6 | **6** |
| ITV | 14 | 12 | 15 | 4 | **3** |
| C4 | 10 | 7 | 10 | 2 | **2** |
| C5 | – | 7 | 8 | 1 | **1** |

*Base: All respondents*
*Note: Historic averages for BBC1 and ITV 1979–95; for BBC2 and C4 1984–95*

Respondents who had identified bias on a named channel were asked which party the channel favoured, but the numbers of respondents involved were small and the findings are not statistically significant. The most that can be said is that, of those perceiving bias on BBC1, the majority said that it favoured the Labour Party, as was found in 2001.

# 7 OFFENCE AND ACCEPTABILITY

The survey turned next to what caused viewers offence and what they found unacceptable. The first question asked was: *'Do you personally see or hear things on television which you find offensive?'*.

As Table 41 shows, the same proportion as in 2001 (two in five respondents) had found things offensive. This is a sustained increase in the level reporting offence compared with that observed in the late 1990s/2000, where it was around one in three.

TABLE 41 **OVERALL LEVELS OF REPORTED OFFENCE: SELECTED YEARS**

| | 1972 | 1977 | 1982 | 1987 | 1992 | 1997 | 1998 | 1999 | 2000 | 2001 | **2002** |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | % | % | % | % | % | % | % | % | % | % | **%** |
| Number of respondents offended | 46 | 38 | 40 | 43 | 43 | 37 | 31 | 32 | 29 | 42 | **42** |

*Base: All respondents*

There were differences between various sub-groups in the proportions reporting offence, particularly variations by age. Table 42 breaks down the data by age, showing that only 17% of young people reported having been offended, compared with 77% of people aged 75+. Other variations were:

- more readers of broadsheet (54%) than of tabloid (39%) newspapers had been offended
- more women (51%) than men (33%) reported offence
- more people in social grades ABC1 (46%) than people in grades C2DE (39%) had been offended
- 50% of BBC viewers reported offence, compared with 42% of those most often watching one of the commercial analogue terrestrial channels, and 27% of those saying they watched a non-terrestrial channel most often.

TABLE 42 **OVERALL LEVELS OF REPORTED OFFENCE BY AGE**

| | Total | | | | | Age |
|---|---|---|---|---|---|---|
| | | 16–24 | 25–44 | 45–64 | 65–74 | 75+ |
| | **%** | % | % | % | % | % |
| Yes | **42** | 17 | 30 | 51 | 70 | 77 |
| No | **56** | 81 | 69 | 48 | 30 | 23 |
| Don't know | **1** | 1 | 1 | 2 | * | – |

*Base: All respondents*
** = less than 0.5%*

The 42% who said they had seen or heard something offensive on television were asked on which channel, or channels, the offensive material had been shown, and Table 43 sets out the replies, together with the figures for the previous three years. In 2002 – as in 2001 – of the commercial analogue terrestrial channels, Channel 4 was most likely to be named, followed by ITV. BBC2 was named by the smallest proportion of these respondents.

TABLE 43 **CHANNELS SAID TO CARRY OFFENSIVE MATERIAL: 1999–2002**

| | 1999 % | 2000 % | 2001 % | **2002 %** |
|---|---|---|---|---|
| BBC1 | 46 | 45 | 25 | **37** |
| BBC2 | 23 | 31 | 17 | **24** |
| ITV | 51 | 47 | 39 | **45** |
| Channel 4 | 45 | 41 | 53 | **53** |
| Channel 5 | 26 | 19 | 40 | **39** |

*Base: All who saw or heard something offensive on television*

Those respondents who identified a particular channel were asked what kind of things they had found offensive on that channel, and the replies for 2000 and 2001, as well as for 2002, are given in Table 44. Almost all the figures for 2002 were up year-on-year. The greatest increases were in mentions of both swearing and sex on BBC1 and Channel 4; swearing on ITV and swearing and violence on Channel 5.

TABLE 44 **MAIN CAUSES OF OFFENCE ON THE FIVE TERRESTRIAL CHANNELS: 2000–2002**

| | 2000 % | 2001 % | **2002 %** |
|---|---|---|---|
| **BBC1** | | | |
| Swearing and offensive language | 57 | 55 | **64** |
| Violence | 34 | 42 | **44** |
| Sex | 29 | 32 | **40** |
| **BBC2** | | | |
| Swearing and offensive language | 50 | 55 | **56** |
| Violence | 32 | 35 | **25** |
| Sex | 29 | 28 | **30** |
| **ITV** | | | |
| Swearing and offensive language | 68 | 51 | **69** |
| Violence | 45 | 43 | **44** |
| Sex | 37 | 39 | **44** |
| **Channel 4** | | | |
| Swearing and offensive language | 62 | 50 | **63** |
| Violence | 43 | 35 | **38** |
| Sex | 40 | 44 | **51** |
| **Channel 5** | | | |
| Swearing and offensive language | 52 | 53 | **66** |
| Violence | 46 | 34 | **44** |
| Sex | 71 | 53 | **58** |

*Base: All who had seen anything offensive on each channel*

Respondents who had been offended were then asked: *'What do you generally do when you are offended?'* and, if necessary, the interviewer added: *'How do you react when you are offended by what you see or hear on television?'*. As last year, about half said that they switched the television off or changed channels, while 14% said they would continue watching or do nothing. About one in 20 claimed to have lodged a complaint or to have talked about it to friends or family. There were differences in reaction by age. More older respondents (60%), than younger (43%), said they would switch off, whereas 54% of younger respondents compared with 38% of the older groups said they would switch channels. To continue watching or do nothing was mentioned by 35% of the youngest age group (16-24).

A final question was addressed to the 42% of respondents who had said they personally saw or heard things on television which they found offensive: *'And if something offends you, do you generally discuss it with someone else?'*. Those who said they did, were asked with whom they discussed it. Just over a quarter (27%) said they did not discuss it, but of those that did, 52% said they discussed it with family, 28% with a friend and 7% with a work colleague.

The interview went on to focus on five particular causes of offence:

- Sex
- Violence
- Swearing
- Intrusion into other people's private lives
- Unfair treatment of people or organisations.

Referring to each in turn, all respondents were asked: *'Do you think, in general, that there is too much, too little, or about the right amount of… on television?'*. Answers are shown in Table 45 and are consistent with those found in 2001. Negative reactions towards intrusion into other people's private lives ranked higher than any of the taste and decency issues considered. The majority opinion – among six out of 10 respondents – of the amount of intrusion was that there was too much of it. More than half of respondents thought there was too much violence and swearing. Respondents were split in opinion of coverage of sex – between 'too much' and 'about the right amount'.

TABLE 45 **OPINIONS ABOUT THE AMOUNTS OF COVERAGE OF FIVE ASPECTS OF TELEVISION**

| | Sex<br>% | Violence<br>% | Swearing<br>% | Intrusion<br>% | Unfairness<br>% |
|---|---|---|---|---|---|
| Too much | 44 | 58 | 56 | 61 | 24 |
| Too little | 5 | 4 | 2 | 1 | 4 |
| About the right amount | 48 | 35 | 41 | 33 | 57 |
| Don't know | 4 | 3 | 2 | 5 | 15 |

*Base: All respondents*

Those respondents who had said there was too much of any of these issues were then asked a follow-up question: *'Does this offend you or are you not really bothered?'*. A third of the total sample said there was both too much swearing and violence on television and that they were offended by it. Similarly, one-fifth of the total sample said both that there was too much intrusion into people's private lives and that there was too much sex and that they were offended by it.

TABLE 46 **OPINIONS ABOUT THE AMOUNTS OF COVERAGE OF FIVE ASPECTS OF TELEVISION, AND WHETHER OFFENDED**

| | Sex | Violence | Swearing | Intrusion | Unfairness |
|---|---|---|---|---|---|
| | % | % | % | % | % |
| Too much, and offended | 19 | 30 | 33 | 22 | 13 |

*Base: All respondents who said 'too much' and were offended, based on total sample*

The effect of age on some of these opinions was substantial and Table 47 gives the same results for respondents aged 16-44. These respondents were significantly less likely than the total sample to feel that there was too much coverage of violence, swearing and sex but were as concerned as other viewers about the amount of intrusion.

TABLE 47 **OPINIONS ABOUT THE AMOUNTS OF COVERAGE OF FIVE ASPECTS OF TELEVISION, AMONG RESPONDENTS AGED 16–44**

| | Sex | Violence | Swearing | Intrusion | Unfairness |
|---|---|---|---|---|---|
| | % | % | % | % | % |
| Too much | 28 | 44 | 40 | 58 | 22 |
| Too little | 7 | 7 | 3 | 2 | 4 |
| About the right amount | 61 | 46 | 54 | 34 | 60 |
| Don't know | 3 | 3 | 3 | 6 | 14 |

*Base: All respondents aged 16–44*

The final question in this section of the interview was: '*Can you think of the most memorable moment, shown on television, for you over the last year or so?*'. The greatest number of mentions (44%) were of the events of September 11 2001 (which did not feature in the 2001 survey as they took place on the last day of fieldwork for that survey). This was the largest number of mentions of any 'memorable moment' since 1998, when 61% recalled the funeral of Diana, Princess of Wales. Other main mentions were of the Queen Mother's death or funeral (10%) and football events (6%).

# 8 PROTECTION OF CHILDREN

The survey moved on to the protection of children, and this section began with a broad question: *'Now, changing the subject slightly, do you think it is mainly the responsibility of parents or of broadcasters to make sure that children don't see unsuitable programmes?'*. As shown in Table 48, results have remained stable over the years: two-thirds of respondents thought responsibility fell to parents and most other respondents thought that the responsibility should be shared equally by parents and broadcasters. There were no significant differences in the answers given by various sub-groups.

TABLE 48 **RESPONSIBILITY FOR CHILDREN'S VIEWING**

| | 1999 | 2000 | 2001 | **2002** |
|---|---|---|---|---|
| | % | % | % | **%** |
| Mainly parents | 62 | 66 | 62 | **65** |
| Mainly broadcasters | 6 | 6 | 10 | **8** |
| Both equally | 31 | 31 | 28 | **27** |

*Base: All respondents*

The interview continued: *'The broadcasters try to make sure that television programmes which are not suitable for children may only be shown after a certain time each evening. Did you know that?'*. Awareness of the Family Viewing Policy and of the 9pm watershed continued to rise – to 97% (up 1% on 2001). Awareness was now almost universal and showed no difference between those in homes with children and those without.

All aware of the watershed were asked, *'Do you know what that time it is for terrestrial TV channels?'*. Of those asked, 83% said correctly that it was 9pm, 8% said it was at 8pm or 8.30pm, 6% said it was at 9.30pm or 10pm (very similar to 2001 findings).

The time of 9pm was confirmed by the interviewer, who then asked whether the respondent thought that 9pm was too early, too late, or about right. As Table 49 shows, 2002 findings were very similar to last year's, with around one in three considering 9pm too early and most other respondents (ie the majority) satisfied with this time.

TABLE 49 **OPINIONS ABOUT THE 9PM WATERSHED**

| | 1998 | 1999 | 2000 | 2001 | **2002** |
|---|---|---|---|---|---|
| | % | % | % | % | **%** |
| Too early | 21 | 22 | 19 | 33 | **29** |
| Too late | 5 | 4 | 8 | 6 | **6** |
| About right | 71 | 71 | 73 | 60 | **64** |

*Base: All respondents*
*Note: 'Don't knows' not shown*

As also found last year, older respondents adopted a less liberal view. The proportion who said that 9pm was too early was higher among 45-74 year olds (37%). This was also true of those with children aged 10-15 at home (38%).

Viewers in multichannel homes were then asked about the variants to the 9pm watershed. *'Some premium satellite, cable and digital channels, such as the Sky movie channels, have two watershed times. One is at 8pm for 15-rated films and the other is at 10pm for 18-rated films. Were you aware of this?'*. Awareness of these watersheds was lower than of the terrestrial equivalent and also seemed to be falling over time. Only 40% of multichannel viewers claimed awareness of the dual watershed, slightly fewer than in 2001 (44%) and significantly lower than awareness in the 1990s (52% in 1995). Asked, further, about whether 8pm and 10pm were the right times for the additional watersheds, or whether they were too early or too late (Table 50), the majority (65%) said that 8pm was about right and 78% said that 10pm was about right. Again, results were close to those from last year.

TABLE 50 **OPINIONS ABOUT THE DUAL WATERSHED**

| | 2000 | 2001 | **2002** |
|---|---|---|---|
| | % | % | **%** |
| 8pm too early | 20 | 24 | **24** |
| 8pm about right | 59 | 64 | **65** |
| 8pm too late | 2 | 1 | **2** |
| 10pm too early | 5 | 9 | **11** |
| 10pm about right | 69 | 76 | **78** |
| 10pm too late | 7 | 3 | **3** |
| Prefer 9pm | 9 | 6 | **3** |
| Don't know | 2 | 3 | **4** |

*Base: All multichannel viewers*

Yet a further option available to viewers in multichannel homes is watching films (and certain other events) on a pay-per-view basis and no timing restrictions are placed on films watched in this way, although additional access requirements are demanded (such as PIN codes). Multichannel viewers were asked, therefore: *'On pay-per-view channels, where you order each film individually, you can watch 12-, 15- and 18-rated films at any time. Do you think these different rules for pay-per-view channels are a good idea or a bad idea?'*. In 2002 (as in 2001) just under half (46%) of multichannel viewers thought the absence of timing restrictions on pay-per-view films was a good idea, which was down from 59% in 2000. Nearly a third thought that it was a bad idea and 17% said it was neither a good nor a bad idea. And, 6% said they did not know.

This rather low level of support for the current regulations concerning pay-per-view films should be seen in the context of only modest numbers of people using the service – only 50% of multichannel viewers had watched anything on a pay-per-view basis and 41% of this group had watched a film. Further, the question did not make explicit that there were other safeguards associated with watching films in this way (eg prominence given to a film's rating or the use of PIN codes).

The caution needed in interpreting this finding is underlined by the low level of awareness of the rules. When respondents were asked: *'And were you aware of these rules for pay-per-view channels before I described them?'*, just less than half (44%) said they had been – again in line with 2001 (45%).

All respondents who were parents of at least one child under 16 were then asked: *'Over the past 12 months, have you actively prevented your child(ren) who is/are under 16 from having access to certain programmes on television because you felt they were unsuitable or bad for them?'*. As Table 51 shows, the proportion of parents saying that they had done so had been increasing up to 2001, but in 2002 had stabilised at 59%. As found in previous years, intervention was more common among parents of children aged four and above and those of higher social grade.

TABLE 51 **ACTIVELY PREVENTING A CHILD FROM ACCESS TO UNSUITABLE PROGRAMMES**

| | | | | Total | | | Age | | Social grade |
|---|---|---|---|---|---|---|---|---|---|
| | 1999 | 2000 | 2001 | **2002** | 0–3 | 4–9 | 10–15 | ABC1 | C2DE |
| | % | % | % | **%** | % | % | % | % | % |
| Yes, prevented | 43 | 49 | 59 | **59** | 44 | 71 | 73 | 65 | 56 |
| Not prevented | 57 | 51 | 40 | **40** | 54 | 28 | 27 | 35 | 43 |

*Base: All respondents with at least one child under 16*
*Note: 'Don't knows' not shown*

Those parents who had reported actively preventing access to unsuitable programmes were then asked how they had done so. As Table 52 shows, the main actions were turning off the television (up on 2001) and switching channels (down on 2001). Parents in higher social grades were more likely to have employed both of these. The use of a parental locking device was the only action significantly more likely to be taken by parents in lower social grades.

TABLE 52 **ACTIONS TAKEN TO PREVENT ACCESS TO PROGRAMMES**

| | | Total | | Social grade |
|---|---|---|---|---|
| | 2001 | **2002** | ABC1 | C2DE |
| | % | **%** | % | % |
| Turned off | 36 | **44** | 54 | 37 |
| Switched channel | 36 | **27** | 32 | 22 |
| Telling them | 18 | **19** | 18 | 20 |
| Sent to bed | 15 | **18** | 16 | 19 |
| Parent lock (equipment/software to prevent children accessing certain TV programmes) | 12 | **10** | 4 | 14 |
| Take them out of room | 5 | **7** | 7 | 7 |
| Other | 4 | **4** | 1 | 6 |

*Base: All parents of children under 16 who had actively prevented access to a programme*

When those same parents were asked how often they had prevented their child(ren) from having access to certain television programmes, 29% said they had done so frequently, 50% occasionally, and 21% hardly ever. The figures were very close to what was found in 2001.

All respondents living in multichannel homes were then asked: *'Does your cable, satellite or digital television system have a feature which enables you to block access to certain channels?'*. Table 53 shows the answers that were given: the majority (64%) said that their system did have such a feature. Some 16% said they did not know. Younger respondents, and those with children in their home, were more likely to claim ownership of a blocking device. This may be a reflection, at least in part, of variations in technological awareness as almost all multichannel systems do, in fact, have such a feature.

TABLE 53 **WHETHER MULTICHANNEL SYSTEM CAN BLOCK CERTAIN CHANNELS**

| | | | | | Age | Children in household | |
|---|---|---|---|---|---|---|---|
| | Total | 16–24 | 25–64 | 65–74 | 75+ | Any | None |
| | **%** | % | % | % | % | % | % |
| Yes | **64** | 82 | 66 | 36 | 12 | 72 | 59 |
| No | **20** | 8 | 20 | 40 | 54 | 19 | 21 |
| Don't know | **16** | 10 | 15 | 24 | 34 | 9 | 20 |

*Base: All respondents in multichannel homes*

The 64% of multichannel respondents who knew their system had a blocking feature were asked how it worked. The majority (75%) said it worked by using a PIN (Personal Identity Number) code or password. Most others said that they did not know (22%).

These respondents were asked, also, whether they used the system. Only a minority (21%) used the blocking device. Usage was greater among people with children at home (34%) and particularly among those with a child aged 10-15 (43%). These levels of awareness and of use of blocking systems are in line with findings in 2001.

# 9 PROGRAMME GENRES

People's attitudes to a range of different types or genres of programming were examined. The section was introduced by: *'At present, the television services in Britain offer a range of different programmes over the various channels. I am going to read out a number of different types and, for each one, I would like you to tell me how interested you personally are to watch that type of programme on television'*.

The list comprised:

- **News**
- **Drama**
- **Entertainment**, such as quizzes, comedies, chat shows and popular music
- **Factual** programmes, that is, straightforward factual accounts of a subject, without analysis or opinion
- **Children's** programmes
- **Arts** programmes
- **Religious** programmes
- **Sport**
- **Current affairs**, that is, a programme explaining and analysing current events
- **Regional** programmes
- **Educational** programmes, that is, for adult viewers, usually with accompanying literature available.

(The words in bold are used below as abbreviations.)

For each type of programme, respondents were asked to say how personally interested they were, using very, fairly, or not at all, with the option of saying they did not know. The results are summarised in Table 54 (those very, or fairly, interested were combined) with variations by sex, age and social grade also shown.

TABLE 54 **INTEREST IN 11 TYPES OF PROGRAMME GENRE, BY AGE, SEX AND SOCIAL GRADE**

| | Total interested | Sex | | Age | | | Social grade | |
|---|---|---|---|---|---|---|---|---|
| | | Men | Women | 16–24 | 25–64 | 65+ | ABC1 | C2DE |
| | % | % | % | % | % | % | % | % |
| News | **93** | 95 | 91 | 83 | 94 | 97 | 97 | 90 |
| Factual | **84** | 89 | 79 | 69 | 87 | 84 | 91 | 78 |
| Drama | **81** | 73 | 88 | 75 | 80 | 87 | 82 | 80 |
| Entertainment | **77** | 77 | 76 | 89 | 76 | 70 | 70 | 82 |
| Regional | **71** | 69 | 74 | 50 | 72 | 85 | 70 | 73 |
| Current affairs | **68** | 75 | 62 | 57 | 68 | 79 | 75 | 62 |
| Educational | **57** | 58 | 55 | 45 | 61 | 52 | 58 | 56 |
| Sports | **53** | 74 | 34 | 51 | 54 | 53 | 52 | 54 |
| Arts | **35** | 33 | 37 | 30 | 33 | 43 | 43 | 27 |
| Children's | **31** | 25 | 36 | 41 | 33 | 17 | 25 | 36 |
| Religious | **24** | 20 | 28 | 11 | 19 | 51 | 23 | 24 |

*Base: All respondents*

The relative 'popularity' of the programme types – as measured by personal interest – was very similar to that found last year. The news continued to dominate interest, with more people aged 16-24 demonstrating interest (83%) compared with 2001 (74%). Factual and drama programmes were cited next most often. Only three programme types were mentioned by less than half of all respondents: arts, children's and religious. A closer comparison of the 2002 data with 2001 show some further changes. Men were more likely in 2002 to express an interest in current affairs (75% in 2002 compared with 66% in 2001); fewer people aged 65+ mentioned an interest in entertainment (70% in 2002 compared with 80% in 2001); and fewer ABC1s mentioned educational this year (58% compared with 66% in 2001).

Variations from the pattern of responses displayed by respondents overall can be summarised under the 11 programme types. (**Greater and less interest are used as shorthand terms for more and fewer people within certain (demographic) groups expressing interest than the average for the total sample for each programme genre.**) Percentages saying they were very or fairly interested are given only where the figures are not shown in Table 54.

- **News** Greater interest with age.
- **Factual** Greater interest among those in higher social grades, among men; less interest among 16-24s and among people in Northern Ireland (76%).
- **Drama** More interest among women than among men, greater interest with age, and less interest in Northern Ireland (62% interested).
- **Entertainment** Greater interest among younger than among older people, among people in lower social grades than higher, and in Scotland (81%) and Northern Ireland (83%); greater interest, too, among tabloid readers (82%) than broadsheet readers (57%) and among those with multichannel television (81%) compared with those with only the five analogue terrestrial channels (72%).
- **Regional** Greater interest with increasing age and less interest among non-white people (55%).
- **Current affairs** Greater interest among men, older people, those in higher social grades, among non-white viewers (85%), among broadsheet readers (85%); and lower interest in Scotland (56%).
- **Education** Greater interest among non-white respondents (75%), and lower interest among those aged 16-24 and in Northern Ireland (48%).
- **Sport** Greater interest in Wales (65%), among men (74%) and among non-white respondents (70%).
- **Arts** Greater interest among older people and among people in higher social grades; also among readers of broadsheet newspapers (60%), and among non-white respondents (48%). Lower interest among people in Scotland and in Northern Ireland and increasing interest with the age at which respondents finished their education (29% for those who finished at 16, 37% for those finishing at 17-19, and 57% for those finishing at 20+).
- **Children's** Greater interest among women than men, among younger than older people and among people in lower than in higher social grades; not surprisingly, greater interest among those with children (51%); also more among non-white (56%) than white (30%) respondents, and among readers of tabloid (32%) than of broadsheet (20%) newspapers.
- **Religious** Greater interest among older people, especially older women (56% for women aged 65+ and 43% for men of the same age). Greater interest too, among those with only Channels 1–5 (30%) than among multichannel viewers (17%), among those practising a religion (60%), among non-white people (47%), and among readers of broadsheet newspapers (33%).

The survey went on: *'Some programmes are made even though they do not attract large audiences, because it is felt that they add to the diversity available on the main terrestrial channels. How important is it to you that BBC1 and ITV continue to show the following types of programmes?'*.

The same list of 11 types of programme was used again and people asked for their opinions on a scale: essential, very important, quite, not very and not at all important. Table 55 gives the percentages of respondents who said essential or very important (the findings were similar to those in 2001), compared with the percentages who had said that each type of programme was very or fairly interesting to them personally.

TABLE 55 **IMPORTANT THAT BBC1/ITV CARRY 11 TYPES OF PROGRAMME GENRE, COMPARED WITH LEVEL OF PERSONAL INTEREST**

| | Essential/very important that they be shown | Personally very/fairly interested |
|---|---|---|
| | % | % |
| News | 93 | 93 |
| Current affairs | 66 | 68 |
| Factual | 65 | 84 |
| Children's | 65 | 31 |
| Educational | 63 | 57 |
| Drama | 58 | 81 |
| Regional | 60 | 71 |
| Entertainment | 55 | 77 |
| Sport | 52 | 53 |
| Arts | 34 | 35 |
| Religious | 31 | 24 |

*Base: All respondents*

Qualitative research shows that ordinary viewers often have difficulty knowing precisely what is included under the headings of certain programme types and this needs to be borne in mind when interpreting these data. However, it is clear that personal interest does not necessarily determine whether or not respondents think that a particular programme type should be shown.

The programme types can be put into six broad groups:

| | |
|---|---|
| **News, Factual** | Centrally important, both for diversity and to viewers (particularly news) |
| **Current affairs, Regional, Educational** | Important, both for diversity and to viewers |
| **Children's** | Important for reasons of diversity, but only to viewers with children |
| **Drama, Entertainment** | Important to viewers, but not so important for diversity |
| **Sport** | Important to many viewers for reasons of diversity, as well as personal interest |
| **Arts, Religious** | Relatively unimportant, both for diversity and to viewers. |

A very different question was asked at this point, in which some commonly reported attitudes were investigated by asking for the reactions of respondents to a number of propositions: *'I am now going to read you a number of statements which people have said about television and the programmes on it. Please could you tell me to what extent you agree or disagree with each statement'*. The seven propositions were read out to all respondents, one by one, and the replies are summarised in Table 56. The table lists the statements in descending rank order of percentages of people saying they definitely agreed – the order is virtually the same as in 2001, except that more people this year said they definitely agreed that the channels they currently received gave them all the choice they wanted (45% compared with 41%).

TABLE 56 **ATTITUDES TO SEVEN STATEMENTS ABOUT TELEVISION**

| | Definitely agree % | Tend to agree % | Tend to disagree % | Definitely disagree % | Don't know % |
|---|---|---|---|---|---|
| (1) The television channels I receive at the moment give me all the choice I want | 45 | 27 | 16 | 11 | 1 |
| (2) If people want to pay extra to watch particularly sexually explicit programmes not available on other TV channels they should be allowed to do so | 40 | 36 | 10 | 13 | 1 |
| (3) If people want to pay extra to watch particularly violent programmes not available on other TV channels they should be allowed to do so | 34 | 31 | 16 | 18 | 1 |
| (4) Interactive services such as email, games and internet access, delivered through digital television offer valuable services to viewers | 15 | 39 | 19 | 14 | 13 |
| (5) Things that are likely to upset or offend even a minority of people should not be shown on television | 11 | 19 | 33 | 35 | 2 |
| (6) I think films shown after 10pm should have the sex, violence or swearing cut out | 11 | 10 | 31 | 46 | 2 |
| (7) I would be willing to pay a reasonable amount to get other services such as banking, home shopping and internet through my television | 6 | 15 | 19 | 59 | 2 |

*Base: All respondents*

The first statement, about having sufficient channel choice at present, attracted widespread agreement (72%) and at even higher levels among respondents who were older (81% of those aged 65+ agreed), those in lower social grades (76%) and those already in multichannel homes (81% agreement).

Agreement was relatively high with the two permissive statements (numbers 2 and 3 in the table), about explicit sex and particularly violent programmes being available to those who choose to pay. There was slightly more tolerance of sex than of violence on television. Agreement was greater among younger respondents, men and those in lower social grades.

The reverse pattern was found in answers to the anti-permissive statements (numbers 5 and 6). The majority disagreed that things which could upset even a minority should not be shown and that sex, violence and swearing should be cut out of films after 10pm. Notably, non-white respondents and those in Scotland, Wales and Northern Ireland were more likely to agree with the idea of not showing anything potentially offensive, perhaps indicating a greater sensitivity to the feelings of minorities among these groups.

The statement about the value of interactive services (4) was endorsed by a majority (54%); by more younger people than older; by more non-white people and by more people in multichannel homes. However, when the suggestion of a cost was mentioned for interactive services (statement 7), support was more modest. Only 21% agreed that they would be willing to pay extra to have access to interactive services. More young people, more non-white people and more people with children agreed.

All respondents were asked a question about the television rights to certain sports events: '*Certain big sports events should be reserved for terrestrial television channels so that they are free for the viewer. To what extent do you agree with this statement?*'. There was very strong agreement with this view (among 90%, with 74% of these definitely agreeing). Elderly women (aged 65+), on the other hand, showed particularly high disagreement when compared with the average, but it was only 11% even among this group.

Finally in this section of mixed questions, respondents with multichannel access were asked about the extent to which they agreed with the statement: '*I will be subscribing to satellite, cable or digital a year from now*'. As found last year, multichannel television commanded considerable loyalty; 85% agreed (67% agreed definitely), 10% disagreed and 5% said they did not know.

Two questions concerning the perceived accuracy and honesty of certain types of factual programmes were then asked. The first question was introduced as: '*I am now going to read out several different types of factual programmes on television. For each one I'd like you to tell me how often you think it provides information which is accurate*'. Then the question was asked in respect of five types:

- Current affairs, such as *Panorama* and *Question Time*
- Nature and wildlife
- News
- Documentaries such as *Network First* and *Cutting Edge*
- Dramatised reconstructions where real people's stories are portrayed by actors, such as *999*.

For each type, people were invited to respond whether they were accurate always, most of the time, sometimes, rarely, or never. The replies are summarised in Table 57 and are consistent with those found in 2001.

TABLE 57 **PERCEIVED ACCURACY IN FIVE TYPES OF FACTUAL PROGRAMMES**

| | Always | Most of the time | Sometimes | Rarely | Never | Don't know |
|---|---|---|---|---|---|---|
| | % | % | % | % | % | % |
| Current affairs | 14 | 55 | 18 | 2 | 1 | 10 |
| Nature and wildlife | 44 | 45 | 7 | * | * | 4 |
| News | 31 | 58 | 9 | 1 | * | 1 |
| Documentaries | 11 | 48 | 17 | 2 | 1 | 21 |
| Dramatised reconstructions | 17 | 51 | 22 | 3 | 1 | 6 |

*Base: All respondents*
*Note: * = Less than 0.5%*

Combining the proportions who said programmes were accurate always and most of the time, nature and wildlife (89%) and news (89%) were way ahead of other genres of factual programmes. Nature and wildlife programmes were perceived as accurate 'always' by the highest proportion of people (44%), with news following some way behind at 31%. Also of interest is the way in which slightly more people perceived dramatised reconstructions always to be accurate (17%) than documentaries (11%).

There were variations in the data, as shown in Table 58.

TABLE 58 **PERCEPTION AS ALWAYS ACCURATE OF FIVE TYPES OF FACTUAL PROGRAMME**

| | Total | Newspaper readership | | Social grade | | Ethnic group | |
|---|---|---|---|---|---|---|---|
| | | Tabloid | Broadsheet | ABC1 | C2DE | White | Non-white |
| | **%** | % | % | % | % | % | % |
| Current affairs | **14** | 15 | 9 | 12 | 15 | 14 | 8 |
| Nature and wildlife | **44** | 48 | 37 | 43 | 45 | 45 | 29 |
| News | **31** | 35 | 19 | 25 | 36 | 30 | 42 |
| Documentaries | **11** | 13 | 8 | 9 | 13 | 12 | 8 |
| Dramatised reconstructions | **17** | 19 | 5 | 12 | 22 | 17 | 19 |

*Base: All respondents*

Tabloid readers were particularly more likely to perceive all five types of factual programme as accurate. Similarly – although to a lesser extent – lower social grades were more likely to perceive programmes as accurate than were those in higher grades.

More white than non-white respondents perceived the information provided by current affairs programmes as always accurate, and the same was found in respect of nature and wildlife programmes and of documentaries. However, non-whites were more likely to perceive news programmes as accurate, a reversal of the situation in 2001 when 24% of non-white respondents had said the news was accurate compared with 31% of white respondents.

Table 59 reports the findings of the next question. The interviewer said: *'I am now going to read out some more different types of factual programmes on television. For each one I'd like you to tell me how often you think it is honest in its portrayal of individuals and the situations they are in'*. For this question the list was:

- Fly on the wall documentaries or docusoaps such as *Hotel* or *Airline*
- Daytime talk shows such as *Trisha* or *Jerry Springer*
- Shows about real people placed in new situations such as *Castaway*, *Big Brother* or *Survivor*.

As was found last year, the numbers of people saying they thought that any of the three types of programme was always honest in its portrayal of individuals and the situations they are in were very small. Differences emerged between the three programme types when the 'always' and 'most of the time' categories were combined. This showed that 42% believed that docusoaps were honest at least most of the time, while fewer – 20% – saw *Big Brother* and other programmes with ordinary people in extraordinary situations as being honest in their portrayals, and fewer than one in 10 (9%) regarded daytime talk shows such as *Trisha* and *Jerry Springer* as honest.

**TABLE 59 PERCEIVED HONESTY IN THREE TYPES OF FACTUAL PROGRAMMES**

| | Always | Most of the time | Sometimes | Rarely | Never | Don't know |
|---|---|---|---|---|---|---|
| | % | % | % | % | % | % |
| Docusoaps | 7 | 35 | 31 | 14 | 4 | 8 |
| Daytime talk shows | 2 | 7 | 19 | 33 | 23 | 16 |
| Real people in new situations | 4 | 16 | 26 | 26 | 13 | 14 |

*Base: All respondents*

Again, tabloid readers were less sceptical than broadsheet readers, as were those in lower social grades (consistent with the perception of these groups of the accuracy of factual television programmes). Another variation, observed last year, was that people in multichannel homes were less sceptical, particularly about docusoaps.

**TABLE 60 PERCEPTION AS HONEST AT LEAST MOST OF THE TIME OF THREE TYPES OF FACTUAL PROGRAMME**

| | Total | Social grade | | Channel reception | |
|---|---|---|---|---|---|
| | | ABC1 | C2DE | Terrestrial | Multichannel |
| | **%** | % | % | % | % |
| Docusoaps | **42** | 38 | 46 | 37 | 47 |
| Daytime talk shows | **9** | 7 | 12 | 9 | 9 |
| Real people in new situations | **20** | 18 | 21 | 16 | 23 |

*Base: All respondents*

Non-whites were more likely than the rest of the sample to perceive docusoaps and daytime talk shows as accurate. The youngest respondents (16-24s) were also more likely than average to perceive talk shows which feature 'real people' as accurate.

# 10 ATTITUDES TO ADVERTISING

The survey turned next to attitudes to advertising on television, using broadly the same questions employed in the surveys since 1996.

The section began: *'The next few questions are about advertising on television. Could you say what it is that you most like?'*. The question was unprompted and only one reply was noted. That was followed by: *'And could you say what it is about it that you most dislike?'*. The replies to both questions are given in Table 61. The figures for 1999 and 2000, as well as those for 2001, are included. The figures are not directly comparable, however, as in 1999 and 2000 respondents were encouraged to name more than one aspect of advertising.

TABLE 61 **ASPECTS OF TELEVISION ADVERTISING LIKED AND DISLIKED (UNPROMPTED)**

| **Liked because** | 1999 | 2000 | 2001 | **2002** |
|---|---|---|---|---|
| | % | % | % | **%** |
| Humour/comedy/funny | 44 | 39 | 46 | **42** |
| Nothing | 23 | 16 | 16 | **21** |
| Some are entertaining | 24 | 31 | 15 | **16** |
| Some are clever | 15 | 16 | 11 | **14** |
| Music/jingles | 13 | 13 | 6 | **11** |
| Give you a break/time for tea | 14 | 24 | 10 | **10** |
| Learn about new products | 8 | 16 | 4 | **4** |
| Gives you new ideas | – | – | – | **2** |
| Some informative | 7 | 7 | 2 | **2** |
| | | | | |
| **Disliked because** | | | | |
| Interrupt programmes | 37 | 42 | 25 | **24** |
| Some silly/pointless | 17 | 13 | 18 | **24** |
| Repetitive | 22 | 26 | 23 | **24** |
| Some irritating | 14 | 9 | 20 | **21** |
| Too many/too much | – | – | – | **19** |
| Interrupt films | 22 | 33 | 14 | **14** |
| Nothing | 13 | 2 | 9 | **8** |
| Boring | 9 | 14 | 2 | ***** |
| Misleading | 5 | 8 | 2 | **4** |
| Product unclear | 7 | 7 | 2 | ***** |
| Too crude/go too far | 3 | 4 | 2 | **2** |
| Insult intelligence | – | – | – | **2** |
| Too much sex | – | – | – | **2** |

*Base: All respondents*
** = Less than 0.5%*

As in previous years, humour was the most liked aspect, mentioned by just under half of respondents. However, this was the only specific 'like' which received **fewer** mentions this year than last. Nearly a quarter said that they liked 'nothing' about television advertising.

As last year, more respondents were critical than were positive about advertising (only 8% disliked nothing, compared with 21% that liked nothing). Three dislikes were mentioned by around a quarter of respondents: that advertising interrupts programmes, is silly/pointless (up on 2001), and is repetitive. Nearly a fifth said there was too much advertising as a dislike, which featured for the first time in 2002.

The next question explored the level of awareness of three forms of promotional message other than those carried in conventional commercial breaks:

- Programme sponsorship such as Cadburys' sponsorship of *Coronation Street*
- Trailers or promotions for particular programmes
- Trailers or promotions for particular television channels.

Table 62 summarises the replies, and shows that in 2002 the relative levels of awareness were the same as in 2001. There was almost universal awareness of programme sponsorship (91%), with younger respondents and those in multichannel homes more likely to be aware.

Many fewer respondents said they were aware of programme trailers than said they were aware of programme sponsorship, but the figure was up from 66% in 2001 to 75%.

The level of awareness of channel promotions (62%) was lower, but again up from 2001 (50%). Those in multichannel homes showed a greater awareness than those in homes receiving only the five analogue terrestrial channels.

TABLE 62 **AWARENESS OF THREE TYPES OF PROMOTIONAL MESSAGE**

| | | Total | | Age | | Channel reception |
|---|---|---|---|---|---|---|
| | 2001 | **2002** | 16–44 | 45+ | Terrestrial | Multichannel |
| | % | **%** | % | % | % | % |
| Programme sponsorship | 86 | **91** | 94 | 87 | 88 | 93 |
| Programme trailers | 66 | **75** | 77 | 73 | 73 | 77 |
| Channel promotions | 50 | **62** | 64 | 59 | 56 | 67 |

*Base: All respondents*
*Note: 'Don't knows' and 'None of these' not shown*

The next question asked how people felt about the amount of advertising currently carried on television: *'Bearing in mind that advertising provides the money to pay for the programmes on ITV, Channel 4 and Channel 5, which of these statements best describes how you feel about the amount of advertising on these channels?'*. Each of four statements was read out and respondents were offered the chance to say they 'did not know'. People with multichannel television at home were then asked a similar question about 'satellite, cable and digital channels'. Table 63 summarises the replies given by terrestrial-only viewers about advertising on ITV, Channel 4 and Channel 5 and Table 64 the replies of multichannel respondents.

Among respondents both with and without multichannel television, the proportion of people saying that there is too much advertising on Channels 3-5 has remained stable – around a third of both groups. In comparison, a consistently higher proportion – around four out of 10 – of those receiving other channels consider there to be too much advertising on these channels. As the report on last year's survey and, indeed, reports on earlier ones have remarked, this disparity might be because more advertising is allowed to appear on channels other than ITV, Channel 4 and Channel 5, or because of different patterns of advertising on those channels, or because those who subscribe to additional channels resent the presence of advertising on channels for which they have already paid.

There were changes in other attitudes; with an increase in those thinking the current amount of advertising on all channels was acceptable and a fall in those who thought more advertising would be acceptable. These changes suggest that the 2001 data, which indicated a possible higher tolerance for the idea of more advertising, were anomalous.

TABLE 63 **ATTITUDES TO AMOUNT OF ADVERTISING AMONG TERRESTRIAL VIEWERS**

| | 1998 | 1999 | 2000 | 2001 | **2002** |
|---|---|---|---|---|---|
| | % | % | % | % | **%** |
| More would be acceptable | 7 | 7 | 9 | 13 | **8** |
| Current amount acceptable | 57 | 52 | 58 | 49 | **55** |
| Too much already | 36 | 40 | 32 | 38 | **35** |

*Base: Respondents receiving only the five terrestrial channels*
*Note: 'Don't knows' not shown*

TABLE 64 **ATTITUDES TO AMOUNT OF ADVERTISING AMONG MULTICHANNEL VIEWERS**

| | Advertising on Channels 3–5 | | | | | Advertising on other channels | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1998 | 1999 | 2000 | 2001 | **2002** | 1998 | 1999 | 2000 | 2001 | **2002** |
| | % | % | % | % | **%** | % | % | % | % | **%** |
| More would be acceptable | 6 | 8 | 12 | 15 | **12** | 5 | 7 | 7 | 14 | **8** |
| Current amount acceptable | 57 | 56 | 56 | 51 | **54** | 49 | 51 | 44 | 44 | **47** |
| Too much already | 38 | 37 | 32 | 34 | **33** | 45 | 42 | 41 | 42 | **42** |

*Base: Respondents with multichannel television*
*Note: 'Don't knows' not shown*

Similar questions were addressed to all respondents in respect of both sponsorship credits and also trailers or promotions for programmes, and Table 65 shows the results, alongside opinions of all respondents about the amount of advertising on the three commercial terrestrial channels.

TABLE 65 **ATTITUDES TO AMOUNT OF THREE TYPES OF PROMOTIONAL MESSAGE**

| | Advertising on terrestrial channels | Programme sponsorship credits | Trailers or promotions |
|---|---|---|---|
| | % | % | % |
| More would be acceptable | 11 | 33 | 26 |
| Current amount acceptable | 55 | 50 | 52 |
| Too much already | 34 | 16 | 19 |

*Bases: All respondents, and all respondents aware of sponsorship and of trailers*
*Note: 'Don't knows' not shown*

Respondents had a higher tolerance for the ideas of more sponsorship credits and of more trailers/promotions than they had for more advertising on terrestrial television. Further, fewer respondents thought that there was already too much of either of these types of promotional message than thought this of terrestrial television advertising.

In comparison with 2001, more respondents thought the current amount of advertising on terrestrial channels was acceptable (55% compared with 48% in 2001). Some 33% thought that more programme sponsorship credits would be acceptable and 26% thought the same about trailers or promotions.

A further question about attitudes to advertising asked respondents a series of 10 attitude statements: *'How often do you find advertisements on television...'* prefaced the following attitudes:

- *are* **informative** *about products or issues?*
- **interfere** *with your enjoyment of programmes?*
- *are* **truthful**?
- *are* **clever?**
- *encourage negative or harmful* **stereotypes**?
- *are* **well produced**?
- *are* **too loud** *(the volume)?*
- *give you something to* **talk about**?
- *are* **embarrassing**?
- *show* **undesirable** *behaviour that children might copy?*

Respondents were invited to answer with one of five replies, from 'very often' to 'never', and were allowed to say they did not know. The words in bold are used as abbreviations in Table 66, which summarises the responses, excluding the 'don't know' replies, and shows for 2002 and the four previous surveys, the percentages answering 'very often' and 'often'. (It should be noted that the phrases 'very often' and 'often' were used in 2001 and 2002, whereas in 1998-2000 the words 'always' and 'often' were employed.)

TABLE 66 **GENERAL ATTITUDES TO TELEVISION ADVERTISING**

| | Often or very often find advertisements... | | | | |
|---|---|---|---|---|---|
| | 1998 | 1999 | 2000 | 2001 | **2002** |
| | % | % | % | % | **%** |
| Interfere | 45 | 45 | 52 | 51 | **53** |
| Well produced | 41 | 35 | 45 | 56 | **52** |
| Clever | 32 | 31 | 39 | 44 | **40** |
| Too loud | n/a | n/a | 16 | 41 | **38** |
| Informative | 27 | 27 | 30 | 29 | **32** |
| Undesirable | 12 | 14 | 9 | 26 | **27** |
| Truthful | 19 | 18 | 28 | 24 | **22** |
| Talk about | 11 | 12 | 18 | 22 | **22** |
| Stereotypes | 14 | 11 | 8 | 20 | **21** |
| Embarrassing | 3 | 3 | 3 | 6 | **7** |

*Base: All respondents*
*Notes: n/a = not asked*
*'Don't knows' excluded*

Two attitude statements dominated opinion: just over half thought that advertisements interfered with enjoyment, while just over half thought they were well produced. Last year, the view that advertisements were well produced showed a large increase and it was the most frequently mentioned attitude. In 2002, however, it received slightly fewer mentions.

Overall, however, year-on-year, negative attitudes have strengthened slightly more than positive ones.

Compared with the overall figures, young respondents found advertisements informative and did not experience them as too loud. More older people found them embarrassing and thought they showed undesirable behaviour. More non-white respondents found them informative, but fewer thought them well produced, found them too loud, thought them truthful, or believed they encouraged harmful stereotypes.

Respondents who had felt advertisements encouraged negative or harmful stereotypes were asked what they meant when referring to stereotypes. As last year, nearly a half (44%) said 'they did not know' and no single answer was given by more than 5% of respondents. Answers given ranged from the stereotyping of women, elderly people and the disabled to violence and imitable behaviour.

A follow-up question about undesirable behaviour was asked of those who felt advertising showed such behaviour. A slightly greater proportion were able to give an answer (63%), but only a few replies were given by more than 5%.

- Fighting/violence/bad behaviour (17%)
- Children copy bad behaviour (10%)
- Bad manners/lack of respect for others (8%)
- Encourage children to ask for things (8%)
- Mentions of Tango advertisements (6%).

There followed questions about whether, how often, and in respect of what, respondents found advertisements on television either misleading or offensive. The first question was: *'How often do you find advertisements on television give you an impression of products or services which you later found to be wrong or misleading?'*. The replies over the last five years are summarised in Table 67.

TABLE 67 **FREQUENCY OF ENCOUNTERING MISLEADING ADVERTISEMENTS ON TELEVISION**

| | 1998<br>% | 1999<br>% | 2000<br>% | 2001<br>% | **2002**<br>**%** |
|---|---|---|---|---|---|
| Often/very often | 17 | 16 | 6 | 17 | **18** |
| Sometimes | 40 | 46 | 21 | 29 | **29** |
| Rarely/Never | 36 | 30 | 62 | 44 | **53** |

*Base: All respondents*
*Note: 'Don't knows' excluded*

The proportion of people saying they often, or very often, found advertisements misleading had remained steady over the years at just under 20% (with the exception of 2000). Around a half claimed to rarely/never encounter misleading advertisements, but these data fluctuate and longer term trends need to be monitored.

Those finding advertisements misleading were asked: *'And thinking about the most recent occasion that you found something wrong or misleading, what was the advertisement that you found wrong or misleading?'*. Nearly half (45%) said they did not know. The main answers given were quite general:

- Food/soft drinks (8%)
- Cleaning products (7%)
- Washing powders (7%).

Table 68 gives the results for an equivalent frequency question about offensiveness. As with the replies to the question about misleadingness, the figures had remained fairly stable over time. Exposure to offensive television advertisements was limited; the large majority had rarely/never encountered them and less than one in 10 often/very often had. There was little variation in the figures across the sample, except for younger people, and especially younger men, among whom a more than average number said that they rarely or never saw an advertisement that offended them.

TABLE 68 **FREQUENCY OF ENCOUNTERING OFFENSIVE ADVERTISEMENTS ON TELEVISION**

| | 1998<br>% | 1999<br>% | 2000<br>% | 2001<br>% | **2002**<br>**%** |
|---|---|---|---|---|---|
| Often/very often | 7 | 3 | 2 | 4 | **6** |
| Sometimes | 13 | 17 | 9 | 14 | **13** |
| Rarely/Never | 81 | 76 | 86 | 80 | **81** |

*Base: All respondents*
*Note: 'Don't knows' excluded*

Asked about the most recent offending advertisement, a large proportion (42%) could not name anything in particular. The only commercials mentioned by more than 5% were sanitary towel/tampon advertisements (12%) and advertisements featuring nudity or depictions of sex (8%).

A final question in this section of the survey on advertising followed on from the last one on offensiveness: '*And are there any times of the day when the advertisement you found offensive would be more acceptable?*'. Replies were not prompted, but were categorised according to the nine 'time bands' shown in the table.

The category '*Only after the 9pm watershed*' was employed for the first time in 2002, but, as will be seen from Table 69, the findings have remained stable year-on-year.

TABLE 69 **WHEN POTENTIALLY OFFENSIVE ADVERTISEMENTS CAN BE SHOWN**

| | 1999<br>% | 2000<br>% | 2001<br>% | **2002**<br>**%** |
|---|---|---|---|---|
| Should not be shown at any time | 62 | 32 | 30 | **26** |
| Should not be shown when children might be watching | 7 | 7 | 3 | **5** |
| Only after 9pm watershed | – | – | – | **5** |
| Only after 8pm | 5 | 2 | 3 | **5** |
| Only after 9pm | 10 | 11 | 7 | **11** |
| Only after 10pm | 2 | 9 | 10 | **10** |
| Only after 11pm | 5 | 1 | 5 | **3** |
| No, should be shown at any time | 3 | 7 | 23 | **26** |
| Don't know and other | 6 | 31 | 12 | **10** |

*Base: All respondents who had seen an advertisement they considered offensive*

As noted in 2001, opinion seemed fairly evenly divided. About a third of viewers who had seen an advertisement they themselves found offensive thought it should not be shown at all; about a third thought it should be shown anyway; and a third thought it should be subject to a timing restriction.

# 11 RADIO

The section on radio was new in 2001 and the first question asked about frequency of radio listening. The proportion of respondents saying they listened to the radio every day, 57%, was up from 51% in 2001.

TABLE 70 **FREQUENCY WITH WHICH PEOPLE SAY THEY LISTENED TO THE RADIO**

| | Total | | | | | Age | | Social grade |
|---|---|---|---|---|---|---|---|---|
| | | 16–24 | 25–44 | 45–54 | 65–74 | 75+ | ABC1 | C2DE |
| | **%** | % | % | % | % | % | % | % |
| 7 days | **57** | 49 | 57 | 57 | 68 | 53 | 64 | 51 |
| 3–6 days | **16** | 23 | 18 | 16 | 5 | 8 | 16 | 17 |
| 1 or 2 days | **9** | 8 | 10 | 9 | 7 | 10 | 6 | 12 |
| Less often | **10** | 10 | 8 | 12 | 13 | 13 | 9 | 12 |
| Never | **8** | 9 | 6 | 7 | 7 | 15 | 5 | 10 |

*Base: All respondents*

TABLE 71 **FREQUENCY WITH WHICH PEOPLE SAY THEY LISTENED TO THE RADIO (CONTINUED)**

| | Total | | Sex | | Ethnic group | | | | Country |
|---|---|---|---|---|---|---|---|---|---|
| | | Men | Women | White | Non-white | Scotland | Wales | N.Ireland | England |
| | **%** | % | % | % | % | % | % | % | % |
| 7 days | **57** | 60 | 54 | 57 | 51 | 49 | 62 | 48 | 58 |
| 3–6 days | **16** | 19 | 13 | 16 | 15 | 12 | 10 | 19 | 17 |
| 1 or 2 days | **9** | 7 | 11 | 9 | 12 | 12 | 12 | 10 | 9 |
| Less often | **10** | 8 | 12 | 10 | 16 | 15 | 11 | 14 | 10 |
| Never | **8** | 5 | 9 | 8 | 6 | 12 | 5 | 9 | 7 |

*Base: All respondents*

Heaviest listening (seven days a week) was more likely to be reported by those aged 65-74 (68%), by those in social grades ABC1 (64%) and by people in Wales (62%). Men reported more listening than women (60% listened every day compared with 54% of women and 79% listened at least three days a week compared with 67% of women). Non-white respondents were lighter listeners, only 51% listening daily, but that was substantially up on 2001 (36%).

A question asked for the first time in 2002 was: *'And do you ever listen to the radio via your television set at home?'*. One in 10 listened this way and younger people (16-24) and non-white respondents were more likely to do so (17% and 22% respectively). Not surprisingly, since radio reception is not possible with a traditional terrestrial television set, 19% of all multichannel viewers said they listened to the radio via their television set and the figure rose to 22% among digital viewers.

The survey went on to ask all radio listeners: *'Have you ever been offended by anything you have heard on a radio programme?'*. Only a minority had ever been offended, 13%. Sub-groups which were more likely to have been offended, based on this small sample, were ABC1s (81%), readers of broadsheet newspapers (76%) and non-white respondents (74%). When asked what had offended them levels of mentions were low: 4% said swearing and offensive language, 2% said sex, 1% said music/song/lyrics, 1% said that something had been disrespectful/intrusive and 1% mentioned the bad treatment of callers by presenters, but nothing else was mentioned by as many as 1%.

The few who had been offended were asked: *'As a result of being offended, what immediate action did you take? Did you…'* Answers were prompted and are shown in Table 72.

TABLE 72 **ACTION WHEN OFFENDED BY A RADIO PROGRAMME**

| | % |
|---|---|
| Made an official complaint | 6 |
| Turned off the radio | 36 |
| Changed to another station | 24 |
| Did nothing/continued listening | 38 |
| Don't know | 1 |
| Other | 5 |

*Base: All who had been offended by a radio programme*

Around two-thirds of those who had been offended took some action, the main responses being to turn off the radio or change stations.

A follow-up question was asked – whether they had discussed what had offended them with someone else. A third (32%) had not discussed it, 40% had discussed it with family, 25% with a friend and 11% with someone else. These are similar levels of reactions to offence on television (chapter 7).

The final question in the radio section asked all respondents: *'If someone was annoyed or upset about the content of a radio programme, what organisation or organisations, do you think they should contact in that case?'*. The results are set out in Table 73 and were very similar to those from 2001. Just over half named an organisation. Only three organisations were mentioned by more than 5%: the channel/broadcaster/station, the BBC and the BSC.

The main variations in the data were the responses given by readers of broadsheet newspapers, among whom a higher proportion said the BBC (22% compared with 13% for all respondents), and the BSC (19% compared with 12% for the sample as a whole).

TABLE 73 **ORGANISATION(S) TO COMPLAIN TO ABOUT A RADIO PROGRAMME**

| | % |
|---|---|
| The channel/broadcaster/station | 21 |
| BBC (British Broadcasting Corporation) | 13 |
| BSC (Broadcasting Standards Commission) | 12 |
| Aware of organisation but can't remember name | 5 |
| Radio Authority | 4 |
| ASA (Advertising Standards Authority) | 2 |
| ITC (Independent Television Commission) | 1 |
| Can't remember | 1 |
| Oftel (Office of Telecommunications) | 1 |
| Complaints programme on radio | 1 |
| Complaints programme on TV | * |
| Government | * |
| Mediawatch (formerly National Viewers' and Listeners' Association)/Mary Whitehouse | * |
| VLV (Voice of the Listener and Viewer) | * |
| OFT (Office of Fair Trading) | * |
| Other | 3 |
| Don't know | 44 |
| No organisation does this | 1 |

*Base: All respondents*
*Note: * = Less than 0.5%*

# 12 THE INTERNET

For the third year running, questions were asked about the internet. Respondents were asked if they personally could access the internet, and, if they could, they were asked where they could access it. The following list of possible locations was read out:

- At home
- At work (out of home)
- At school
- At university
- At a public place (internet café, library, etc)
- On WAP/internet mobile phone
- Elsewhere (friends, relatives, etc).

Table 74 summarises the replies and gives the 2001 figures for comparison. Total internet access has increased slightly over the last year, from 47% to just over half of the sample (52%). Access was greatest among the youngest respondents (16-24's), higher social grades and non-whites. It was also highest in England (55%) and significantly lower in Northern Ireland (35%) and Scotland (39%).

TABLE 74 **WHETHER AND WHERE ACCESS THE INTERNET**

| | Total | | Age | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | 16–24 | | 25–44 | | 45–64 | | 65+ | |
| | 2001 | **2002** | 2001 | **2002** | 2001 | **2002** | 2001 | **2002** | 2001 | **2002** |
| | % | **%** | % | **%** | % | **%** | % | **%** | % | **%** |
| At home | 38 | **44** | 55 | **58** | 49 | **53** | 34 | **46** | 8 | **13** |
| At work | 14 | **16** | 13 | **14** | 23 | **27** | 13 | **14** | * | **–** |
| Elsewhere | 5 | **5** | 16 | **18** | 5 | **5** | 2 | **2** | * | ***** |
| Public place | 3 | **4** | 7 | **11** | 6 | **5** | 1 | **3** | – | **–** |
| WAP phone | 2 | **3** | 4 | **7** | 4 | **4** | – | **1** | – | **–** |
| University | 2 | **2** | 11 | **14** | 1 | **1** | * | ***** | – | ***** |
| School | 3 | **2** | 15 | **9** | 1 | **2** | * | ***** | – | **–** |
| Don't know | 1 | **1** | – | **1** | 1 | **1** | 1 | ***** | 3 | **1** |
| Cannot | 53 | **48** | 29 | **23** | 38 | **34** | 61 | **51** | 89 | **87** |

*Base: All respondents*
*Note: * = Less than 0.5%*

TABLE 74a **WHETHER AND WHERE ACCESS THE INTERNET (CONTINUED)**

| | Total | | Social grade | | | | Ethnic group | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | ABC1 | | C2DE | | White | | Non-white | |
| | 2001 | **2002** | 2001 | **2002** | 2001 | **2002** | 2001 | **2002** | 2001 | **2002** |
| | % | **%** | % | **%** | % | **%** | % | **%** | % | **%** |
| At home | 38 | **44** | 54 | **58** | 25 | **31** | 38 | **43** | 35 | **57** |
| At work | 14 | **16** | 26 | **26** | 5 | **7** | 14 | **16** | 20 | **8** |
| Elsewhere | 5 | **5** | 5 | **5** | 5 | **5** | 5 | **5** | 6 | **11** |
| Public place | 3 | **4** | 5 | **4** | 2 | **4** | 3 | **4** | 16 | **15** |
| WAP phone | 2 | **3** | 2 | **4** | 1 | **2** | 2 | **3** | – | **5** |
| University | 2 | **2** | 4 | **3** | 1 | **2** | 2 | **2** | 2 | **–** |
| School | 3 | **2** | 4 | **3** | 1 | **1** | 3 | **1** | 1 | **18** |
| Don't know | 1 | **1** | 1 | **1** | 1 | **1** | 1 | **1** | * | **3** |
| Cannot | 53 | **48** | 32 | **34** | 68 | **60** | 53 | **49** | 44 | **22** |

*Base: All respondents*
*Note: * = Less than 0.5%*

The internet was most likely to be accessed at home. Nearly half (44%) of respondents mentioned home access, up from 38% last year. Such access was higher among younger people, those aged 16-24 and 25-44, people in higher social grades and among non-white people. The figure rose to its highest among men aged 16-24 (62%) and those in the AB social grades (65%).

The second most used internet access point was at work, reported by an average of 16% of respondents. The figure was higher among ABC1s (26%), those aged 25-44 (27%) and among men aged 25-44 (32%). Other specific places to access the internet were used by less than 5% of respondents. People in the youngest age group, 16-24, reported higher than average rates of access in a range of 'other' locations – with friends and relatives, in internet cafés or libraries, at school and university – as did non-whites.

The frequency with which people reported using the internet had increased slightly year-on-year. Among all people with internet access, the number using the internet daily or almost daily rose from 35% to 39%; using it several times a week was virtually unchanged (26%); using it a few times a month went up from 17% to 19%; using it less frequently dropped from 16% to 11%; and never using it remained steady at 5%.

As found last year, daily/almost daily use was greater among ABC1s, men and non-whites.

TABLE 75 **DAILY/ALMOST DAILY INTERNET USE**

| | | 2001 % | **2002 %** |
|---|---|---|---|
| Total | | 35 | **39** |
| Age | 16–24 | 26 | **37** |
| | 25–44 | 40 | **38** |
| | 45–64 | 36 | **46** |
| | 65+ | n/a | **n/a** |
| Social grade | ABC1 | 41 | **44** |
| | C2DE | 25 | **32** |
| Sex | Men | 38 | **47** |
| | Women | 31 | **31** |
| Ethnic group | White | 36 | **39** |
| | Non-white | 28 | **47** |

*Base: All with internet access*
*n/a: Sample sizes too small*

Those respondents who had reported using the internet were asked for how long they had been doing so, and the replies for 2001 and 2002 are summarised in Table 76. The decline in numbers of people having used it for two years or less suggests a slowing down in the rate of growth of internet usage.

As in 2001, ABC1s were more likely to be established users, with 65% of ABC1s having used it for more than two years, compared with 55% of C2DEs. Established use was also relatively high among readers of broadsheet newspapers and among people who said that the television channels they watched most were BBC1 and BBC2.

TABLE 76 **LENGTH OF TIME USING THE INTERNET**

| | 2001 % | **2002 %** |
|---|---|---|
| Less than 3 months | 5 | **3** |
| 3–12 months | 21 | **13** |
| 1–2 years | 35 | **23** |
| More than 2 years | 39 | **61** |

*Base: All who use the internet*

Respondents were asked: *'And what do you mainly use the internet for?'*. The replies to this question – which were unprompted – are set out in Table 77.

The overwhelming pre-eminence of email as a use of the internet is clear, and seems to be gaining in popularity, having gone from being mentioned by 58% of internet users in 2001 to 64% in 2002. *'Research/looking for information'* was not a category used in 2001, and the 2001 figure of 17% is a combination of the 14% categorised as *'To get information about a particular activity/interest'* and the 3% under the heading *'Information (general mention)'*. There clearly has been an increase in this kind of use as reported. *'Travel/looking for holiday information'* enjoyed an apparent boost in popularity, being mentioned by 26%, compared with only 4% in 2001, whereas *'School/college/university work'* was mentioned by only 10% of users in 2002, half the number found in 2001.

TABLE 77 **REPORTED USES OF THE INTERNET (UNPROMPTED)**

| | 2001 | **2002** |
|---|---|---|
| | % | **%** |
| Email | 58 | **64** |
| Research/looking for information | 17 | **58** |
| Travel/looking for holiday information | 4 | **26** |
| Shopping/information for shopping | 29 | **24** |
| Business purposes | 22 | **17** |
| Sports information | 11 | **12** |
| News/current affairs | 12 | **11** |
| School/college/university work | 20 | **10** |
| To play games | 3 | **3** |
| Internet banking | 1 | **3** |
| To listen to or download music | 2 | **2** |
| Browsing for fun | 4 | **1** |
| To take part in discussion groups/online chat | 2 | ***** |
| To look at job opportunities | 1 | ***** |
| To get information about a particular TV programme | * | ***** |
| Other | 2 | **3** |

*Base: All users of the internet*
*Note: * = Less than 0.5%*

All respondents who had said they had access to the internet were asked whether they had ever accessed the internet via their television set at home and 92% said they had not. Of the sample, 2% said they had accessed the internet in this way quite frequently or very often.

In 2002, for the first time, the interview went on: *'Thinking about whether we should try to regulate or control the internet in some way, which of these statements comes closest to your own view?'*:

- *Everybody should be allowed to choose for themselves what material they want to look at* (referred to in tables as 'personal choice')
- *There should be some way of making sure harmful things are removed from the internet* (referred to as 'regulatory control').

Across the total sample, agreement was much higher with the idea of regulatory control (72%) than with personal choice of material (21%), as seen in Table 78. This was true also of those who used the internet daily, although the proportions within this group arguing for external regulatory control were lower than for the sample as a whole.

TABLE 78 **VIEWS ON INTERNET REGULATION**

| | | Agree with 'Personal choice' % | Agree with 'Regulatory control' % | Don't know % |
|---|---|---|---|---|
| Total | | 21 | 72 | 7 |
| Age | 16–24 | 39 | 57 | 4 |
| | 25–44 | 22 | 73 | 6 |
| | 45+ | 16 | 75 | 9 |
| Sex | Men | 26 | 67 | 6 |
| | Women | 17 | 76 | 7 |
| Ethnic group | White | 21 | 72 | 7 |
| | Non-white | 33 | 67 | – |
| Internet use | Daily | 33 | 64 | 3 |
| | Less than daily | 23 | 75 | 1 |

*Base: All respondents*

The statement which took the more permissive line about personal choice attracted greater support from younger people, from men, from non-whites and from those who used the internet daily. It might be expected that daily internet users would have greater experience of what the internet can offer and the possibilities for self-regulation. Conversely, agreement with the 'regulatory' statement was greater among older people, women and those who use the internet less than daily.

Next, all respondents – not only those with access to the internet – were asked: *'If someone was concerned by anything they saw on the internet – what organisation or organisations do you think they should contact?'*. No list was read out, so the responses reported in Table 79 were unprompted. Around a quarter of respondents, in both 2002 and 2001, could name an organisation.

TABLE 79 **ORGANISATION(S) TO CONTACT IF CONCERNED ABOUT SOMETHING SEEN ON THE INTERNET**

| | 2001<br>% | **2002**<br>**%** |
|---|---|---|
| Internet Service Provider (eg AOL, Freeserve, etc) | 6 | **10** |
| The police | 3 | **5** |
| Internet Watch Foundation | 2 | **3** |
| Aware of organisation but can't remember name | 2 | **2** |
| ASA (Advertising Standards Authority) | – | **1** |
| Trading Standards Office | 2 | **1** |
| Government | – | **1** |
| BSC (Broadcasting Standards Commission) | 1 | **1** |
| Oftel (Office of Telecommunications) | 1 | **1** |
| OFT (Office of Fair Trading) | – | **1** |
| Other | 1 | **1** |
| Don't know | 76 | **73** |
| No organisation does this | 5 | **3** |

*Base: All respondents*
*Notes: * = Less than 0.5%*
*Responses given by fewer than five people not shown*

The most frequently mentioned organisation was an Internet Service Provider (ISP), nominated by 10% of respondents overall (up on 6% in 2001). An ISP was more likely to be mentioned by those with internet access (15%), by men aged 16-24 (16%), by younger people aged 16-24 (14%) and by people with cable subscriptions (17%).

The Internet Watch Foundation was mentioned by just 3% of respondents, but by 4% of younger people and by 5% of those with internet access. Among those with internet access, levels of mentions of the Internet Watch Foundation have fallen since 2000 (9%). This was also true of mentions of an ISP among this group – falling from 18% in 2000, to 15% in 2002. Possibly, as internet penetration grows, it is acquired by people without the more specialist, enthusiastic interest of the earlier adopters.

All respondents with access to the internet were asked a further question: '*There are various ways available to restrict or control access to the internet or worldwide web. Have you heard of any of the following?*'. And the following list was read out:

- A hotline for reporting illegal material on the internet
- Controls offered by online internet suppliers which allow access to certain sites to be restricted
- Sites where you have to give your age
- Software blocking access to sites which contain specific words or pictures
- The Internet Watch Foundation.

The replies to this question by people with internet access are reported in Table 80. Knowledge of the ways of controlling internet access continued to grow year-on-year among those with children at home, although, apart from the marked increase in the awareness of controls offered by online suppliers, growth rates had slowed. Awareness levels among those with children were now in line with those without children (which had changed little overall since last year).

TABLE 80 **PEOPLE HAVING HEARD OF WAYS OF CONTROLLING INTERNET ACCESS**

| | People with children | | | People without children | | |
|---|---|---|---|---|---|---|
| | 2000 | 2001 | **2002** | 2000 | 2001 | **2002** |
| | % | % | **%** | % | % | **%** |
| Software blocking access to sites which contain specific words or pictures | 26 | 51 | **54** | 34 | 51 | **53** |
| Controls offered by online internet suppliers which allow access to certain sites to be restricted | 36 | 40 | **53** | 48 | 55 | **51** |
| Sites where you have to give your age | 24 | 34 | **38** | 33 | 32 | **34** |
| A hotline for reporting illegal material on the internet | 11 | 10 | **11** | 21 | 13 | **10** |
| The Internet Watch Foundation | 5 | 6 | **8** | 12 | 11 | **10** |
| Don't know | – | 7 | **5** | – | 7 | **5** |
| None of these | 36 | 17 | **16** | 25 | 18 | **20** |

*Base: All respondents with internet access*
*Note: More than one way of restricting access could be named*

Awareness of all of these ways of internet access control was higher among men than among women. Men aged 24-44 had significantly higher awareness of both blocking software and supplier controls, whereas the youngest men (aged 16-24) had higher awareness of sites with an age restriction.

Respondents with internet access at home were asked: *'Do you have any internet filtering tools in operation on your home PC? By this I mean software which is capable of screening the content of web sites and blocking certain users' access to those web sites, such as children?'*. Across all respondents to whom the question was addressed, 25% said they did have filtering tools in operation, 68% said they did not, and 7% said they did not know. Among those with children at home, however, rather more (33%) said they had such software. These findings are consistent with last year's.

Respondents who had internet filtering software in operation were asked: *'And which internet filtering tools do you have in operation on your home PC?'*. With such a small number of people asked, extreme care must be taken with the replies received, but Microsoft was mentioned by 10 respondents, Norton Firewall and Passwords were each mentioned by nine respondents, AOL by five and Net Nanny by three.

The final question asked respondents with internet access at home: *'How would you go about finding such an internet filtering tool?'*. As in 2001, the most common suggestion was searching the internet (44%), followed by asking in a computer shop (19%), asking a friend or a member of the family (13%) and asking your Internet Service Provider (2%). Just under a quarter (22%) said they would not know what to do.

# 13 APPENDIX I: TECHNICAL

This research was conducted as an in-home, face-to-face CAPI (Computer Assisted Personal Interview) survey among a representative sample of UK adults (aged 16+). In addition to the UK survey, boosts were carried out in Northern Ireland, Scotland and Wales, in order to achieve the specified minimum numbers of interviews enabling independent analysis of these countries. Due to the length of interview needed to meet the data requirements of the ITC/BSC, a £3 incentive voucher was given to each respondent as a 'thank you' for taking part in the survey.

Fieldwork for the 2001 survey began shortly after the transmission of the controversial programme in *Brass Eye* which satirised the media's handling of paedophilia. This programme received extensive, and largely negative, coverage in the media and there was concern that the findings of the 2001 survey (especially those concerned with standards) could have been affected by that publicity. In an effort to minimise any such effects of particular events at one point in the 12-month period, it was decided, therefore, to conduct fieldwork for the 2002 survey in two parts. The first part of fieldwork was conducted between 25 March and 18 April 2002 and the second half between 26 August and 15 September 2002.

The sampling technique used in this survey is 'random locale sampling', a tightly controlled form of quota sampling developed within BMRB International. The aim of random locale sampling is to eliminate the more unsatisfactory features of quota sampling, without incurring the cost and other penalties involved in conducting surveys according to strict probability methods. The basic characteristics of random locale sampling are as follows:

- Random selection of individual neighbourhoods, stratified by region and 54 different neighbourhood types (ACORN) geo-demographics.

- These neighbourhood types are drawn with probability proportionate to sample and taking into account interviewer locations. This produces sampling points which, taken together, represent the UK precisely, including urban/rural, more affluent/poorer neighbourhoods, proportion of ethnic minority residents, understanding to be older/younger etc.

- Interviewers then have approximately 150 addresses from which to obtain their interviews, limiting them to these addresses and ensuring that they do not obtain the interviews only from stereotypical middle class/working class neighbourhoods.

- The sample selection produces the correct balance of socio-economic groups, so the quota to be achieved by the interviewer can focus on ensuring correct representation by sex, age and working status.

The interviews were conducted among adults (defined as 16 years old or over) who had a working television set in their household. Within each sampling point, quotas were set for age and social grade within sex, with further controls on the number of non-working men and women. A maximum of one interview per household was allowed. A total of 1,191 interviews was achieved over the two waves of fieldwork and this can be broken down regionally as follows:

| | Number of interviews |
|---|---|
| England | 681 |
| Scotland | 201 |
| Wales | 207 |
| Northern Ireland | 102 |
| **Total** | **1,191** |

Weighting has been applied to the data at the analysis stage to ensure that the sample's demographic profiles are nationally representative of the group sampled. Weighting used (according to 2000 BARB estimates) was in terms of region (to weight the boosted samples to their natural proportion within the UK). In addition, weighting by sex, within age, was also applied. The following table shows the unweighted and the weighted composition of the sample.

| | Unweighted | Weighted |
|---|---|---|
| Base: | 1,191 | 1,191 |
| | % | % |
| **Demographics:** | | |
| **Sex** | | |
| Male | 45 | 49 |
| Female | 55 | 51 |
| **Age** | | |
| 16–24 | 13 | 14 |
| 25–44 | 33 | 38 |
| 45–64 | 32 | 29 |
| 65–74 | 13 | 12 |
| 75+ | 8 | 7 |
| **Social grade** | | |
| ABC1 | 44 | 48 |
| C2DE | 56 | 52 |
| **Country** | | |
| England | 57 | 85 |
| Scotland | 17 | 8 |
| Wales | 17 | 4 |
| Northern Ireland | 9 | 2 |

# APPENDIX II: CHANNELS ASKED ABOUT

| | |
|---|---|
| BBC1 | Fox Kids |
| BBC2 | Front Row |
| ITV1 | Granada Men & Motors |
| Channel 4 (S4C in Wales) | Granada Plus |
| Channel 5 | Ideal World |
| Sky One | ITN News |
| Sky News | ITV2/S2/TVYOU |
| Sky Movies – Premier, Moviemax, and Cinema | Local cable channel |
| The Discovery Channel | MBC |
| UK Gold | MUTV (Manchester United TV) |
| Sky Sports – 1/2/3/Extra | Namaste |
| Living | National Geographic |
| MTV | Nickelodeon |
| BBC News 24 | Nick Jr |
| UK Style | Performance/The Arts Channel |
| British Eurosport | Phoenix China News & Entertainment |
| E4 | Product Information Network (shopping channel) |
| Sky Sports News | Playboy TV |
| VH-1 (VH One) | Playhouse Disney |
| Paramount Comedy | QVC/The Shopping Channel |
| Sky Box Office | Screen Shop |
| The History Channel | Shop! |
| Animal Planet | Sky Travel |
| Artsworld | Sony Entertainment |
| Asianet | Tara |
| BBC Choice | TCM |
| BBC Parliament | Television X – The Fantasy Channel |
| BET International | The Adult Channel |
| Bloomberg Television | The Box |
| Boomerang | The Channel Guide |
| Bravo | The God Channel |
| B4U | The Racing Channel |
| Carlton Cinema | The Sci-Fi Channel |
| Cartoon Network | Toon Disney |
| Challenge TV | Travel |
| Channel One (Liverpool only) | Trouble |
| CNBC | TV Travel Shop |
| CNN | UK Drama |
| Discovery Home & Leisure | UK Horizons |
| Disney | Play UK |
| Euronews | Vision |
| Film Four | Zee TV |