



Public Service Broadcasting: Annual Report 2008

Research Document

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Executive Summary

Ofcom has a duty to assess the designated public service broadcasters (PSBs), taken together, in terms of their delivery of the public service purposes set out in the 2003 Communications Act.

This is the second report in an annual series that aims to provide an evidence base for monitoring the delivery of public service broadcasting (PSB). The designated PSB broadcasters are the BBC, ITV1, GMTV, Channel 4, Five, S4C and Teletext. This report gives a factual account of broadcast hours, viewing figures and audience opinions of the channels, rather than a strategic review of the PSB landscape. Its purpose is to enable both Ofcom and its stakeholders to gain a deeper understanding of the current position of PSB delivery in the UK, and how this has changed over the last five years.

These annual reports will provide an evidence base for the performance of the public service broadcasters in the lead-up to digital switchover. Ofcom's second PSB Review is currently under way, in which Ofcom will assess the delivery of PSB and recommend ways of maintaining and strengthening quality of public service broadcasting¹. Data from this report have been used extensively within the PSB review.

The main findings from the research are set out below.

Overview

- Overall, audiences believe that public purposes are important and are generally being delivered by the PSB channels together. Specifically, most people still feel that the public service broadcasters (PSBs) deliver *well-made, high quality programmes*; satisfaction with delivery of news and information is particularly high.
- While satisfaction with current PSB delivery is generally high among UK viewers, there are some areas where audiences expect more than they currently get from the main five channels, particularly programming for the nations and regions, UK Children's content, and the areas of *innovation, new programmes made in the UK, challenging content, quality and trust*.
- The PSBs continue to commission first-run UK originated production. The number of hours of first-run UK originated programming on the main five channels increased by 2% in 2007 compared to 2006, largely driven by the Other Factual category. However, investment in first-run originated programming has decreased by 10% in real terms from 2003 to 2007.
- The combined audience share of the main PSB channels fell by 3% in 2007 compared to 2006, although it was stable in cable and satellite homes, and the PSBs still accounted for around two-thirds of viewing in 2007. In peak time, combined share of the main PSB channels fell by around 3% in 2007, to 61%.

¹ *Ofcom's Second Public Service Broadcasting Review (Phase One: The Digital Opportunity)*

- Viewing of Children’s programming on the PSB channels rose for the first time in over five years, from 84 hours per year per child to 88 hours, an increase of 5%. This was largely due to the performance of the BBC children’s channels.

Importance and delivery of purposes and characteristics on PSB channels

PSB purposes

- 1. Informing our understanding of the world** - To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas
- 2. Stimulating knowledge and learning** -To stimulate our interest in and knowledge of arts, science, history and other topics through content that is accessible and can encourage informal learning
- 3. Reflecting UK cultural identity** - To reflect and strengthen our cultural identity through original programming at UK, national and regional level, on occasion bringing audiences together for shared experiences
- 4. Representing diversity and alternative viewpoints** - To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere

PSB characteristics

- High quality** - well-funded and well-produced
- Original** – new UK content rather than repeats or acquisitions
- Innovative** – breaking new ideas or re-inventing exciting approaches, rather than copying old ones
- Challenging** – making viewers think
- Engaging** – remaining accessible and attractive to viewers
- Widely available** – if content is publicly funded, a large majority of citizens need to be given the chance to watch it

- Overall, audiences believe that public purposes are important and are generally being delivered by the PSB channels together.
- Statements relating to delivery of programming which *informs people’s understanding of the world* are deemed to be the most important elements of PSB by the majority of UK viewers. They are also the areas where the broadcasters are delivering their strongest performance, according to viewers’ satisfaction ratings, with around two-thirds of respondents being satisfied with statements relating to this purpose.
- Regional News is perceived as particularly important to viewers in all the nations, along with *the positive portrayal of people in the nations/regions to the rest of the UK* and *provision of non-News regional programmes*. The *positive portrayal of lives in the nations* is seen as important by those in the devolved nations.
- While statements relating to programming for the nations and regions and Children’s programmes are ranked highly in terms of importance, satisfaction is much lower, with significant gaps between importance and satisfaction suggesting that there is room for improvement in these areas.
- In terms of the characteristics of public service broadcasting, all of these were seen as important by at least two-thirds of respondents. Showing *well-made, high quality* programmes, *trust* in channels and *showing programmes that viewers want to watch* were perceived to be the most important characteristics.

- However, there are significant gaps between importance and satisfaction including *trust* in channels, the amount of *new programmes made in the UK* and *innovation* in terms of *showing programmes with new ideas and different approaches*.
- Showing *enough new programmes, made in the UK* is one of the lowest-rated characteristics and has one of the largest 'satisfaction gaps' between perceived importance and perceived delivery. It is also worth noting that the BBC/Gfk Pulse survey found that UK-made programmes were much more likely to have taught viewers something new, were discussed by viewers after watching and were thought of as being inspiring and thought provoking.
- Other characteristics where there are sizeable gaps between importance and delivery are *challenging (showing programmes that make me stop and think)* and *quality (showing well-made high quality programmes)*.

Contribution of individual channels to PSB purposes and characteristics

- Regular viewers' opinions of each of the channels improved in 2007 compared to 2006. However, the strengths of the main five channels, relative to each other, remain broadly the same.
 - Purpose 1 – *informing our understanding of the world* - continues to be delivered particularly well by BBC One.
 - BBC Two continues to make the strongest contribution to purpose 2 - *stimulating knowledge and learning*.
 - In terms of purpose 3 – *reflecting UK cultural identity* - BBC One and ITV1 are still perceived to be the channels which best offer coverage of big national events and high quality UK Soaps and Drama. The audience perception is that programming for the nations and regions also continues to be well-delivered by these channels.
 - Purpose 4 - *representing diversity and alternative viewpoints* - continues to be an area of strength for Channel 4, as well as BBC One and Two.
 - In terms of PSB characteristics, being *innovative* is still most associated with BBC Two and Channel 4. Perceived *quality* of programmes is highest for BBC channels. BBC Two, BBC One and Channel 4 are seen as the channels most likely to provide *challenging* content. Five is strongly associated with *engaging* programming.
- BBC News 24 was included on the PSB Tracker survey for the first time in 2007. It is viewed particularly positively among its regular viewers, and while its strength lies in purpose 1 – *informing our understanding of the world* - it also scores very positively on all the remaining purposes and characteristics.

Output of PSB channels

- Output of first-run originated programming on the main five channels increased in 2007 by 2% to 34,141 hours, largely driven by non-peak, network originations in the form of late-night phone-in quiz programmes on ITV1 and Five, which were produced in-house or commissioned. However, investment in first-run originated programming has decreased by 10% in real terms from £3 billion in 2003 to £2.7 billion 2007.

- The growth in Factual output on the PSB channels in recent years continued in 2007, to 11,162 hours, up from 10,570. Increases in output in the past year were driven by lighter, less serious, Factual sub-genres such as Magazine formats, Leisure & Hobbies and Factual Entertainment.
- The amount of first-run peak time-originated Specialist Factual increased slightly in 2007 (due to more output on Five, BBC Two and BBC Four), but not to the levels seen in 2005.
- Hours of 'Formal' Education programmes declined in 2007. This was due to fewer repeats of programmes for schools on BBC Two and CBBC (having been replaced by Children's programmes) and a change in the volume broadcast under the BBC's Learning Zone.
- Hours of Religious and Arts programming also continue to decline.

Viewing of PSB channels

- The combined audience share in all homes of the five main channels continued to fall in 2007. Decreases were seen in peak time (from 74% to 71%) and all day (from 67% to 64%). Share for multichannels increased at the expense of the main channels.
- Across the whole day Channel 4 had the largest fall in audience share and ITV1 had the largest peak-time decline.
- Share of viewing of the main five channels on cable and satellite remained stable in 2007, at 48%. However, combined share on Freeview dropped by a further 4% to 67% in 2007, compared to 2006.
- In order to compete in the digital environment, the main five channels have developed digital channel portfolios, which compensate for reduced share on the parent channel. In multichannel homes, the BBC's overall family of channels and the ITV family of channels attained significant share at 31% and 22% respectively. Channel 4's family of channels received a share of 11% and Five benefited from its portfolio channel launches with a small uplift in overall audience share in 2007 to 6%.
- The genre mix watched on the main five channels remained similar in 2007 as in 2006 (in terms of share of viewing).
- Average yearly viewing of UK Comedy has reduced by 50% over the past five years, to eight hours in 2007. In 2003 just over half of all viewing of UK Comedy was of programmes on BBC One, while in 2007, three-quarters of viewing was on this channel.

Children's programming

- The downward trend in the total volume of Children's programmes broadcast continued in 2007. However, a higher volume of programmes were shown on BBC Two, CBBC and CBeebies, although this was largely due to repeats.
- Hours of first-run originated Children's programming on PSB channels were down by one-third in 2007 compared to the previous year:

- ITV1's first-run originated children's output fell from 158 to 106 hours. This reflected ITV1's strategy of shifting Children's programming from the weekday afternoon slots to other parts of the schedule.
- Although the BBC increased investment in first-run originated Children's programming, its volume decreased from 1,276 hours in 2006 to 803 hours in 2007. This was partly due to changes in the BBC's commissioning strategy which reduced the numbers of long-running, low cost shows and aimed to produce fewer but better programmes. There were also changes in scheduling in 2007 which meant that programmes were no longer broadcast *simultaneously* across channels and were therefore no longer counted as first-run originations on each channel.
- Viewing of Children's programming on the PSB channels increased from 84 hours per year per child to 88 hours, an increase of 5%. The proportion of Children's programming watched on the BBC digital channels increased (from 21% share in 2006 to 24% in 2007) at the expense of the commercial multichannels.
- Children's PSB is still seen as important by parents of children of all ages. However, it has one of the largest gaps between satisfaction and importance, with just under half of all parents seeing the PSB channels together as performing well.

Teletext

- The reach of analogue Teletext and Ceefax declined sharply between 2004 and 2006 across the main five channels and this decline continued across all channels from 2006 to 2007, albeit at a slower rate. The analogue service is currently more popular with viewers than the digital terrestrial television service, even in digital television households.
- Just over a third of the UK population (36%) claimed to use Teletext, and opinions of the Teletext service are positive among regular users.
- Despite this reduction in reach, the Teletext service continues to be valued among many of its loyal user base. Regional/national (55%) and UK News (51%) pages are claimed to be among the most-viewed information, along with Weather (66%) and Sports (55%), based on those who use the service at least once a month.

S4C

- Regular viewers of S4C Welsh-language programming associate the channel most strongly with PSB purpose, 1 relating to News provision, and to purpose 3, relating to regional/national output.
- The weekly reach of Welsh-language programming on S4C was 20% in 2007; lower than in 2006, and continuing the longer-term trend of declining weekly reach of S4C Welsh-language programming.

Introduction

Ofcom has a duty to assess the designated public service broadcasters, taken together, in terms of their delivery of the public service purposes as set out in the 2003 Communications Act. Parliament asked Ofcom to monitor the effectiveness of public service broadcasters in delivering the range of PSB purposes and characteristics.

This annual report is an outcome of Ofcom's first PSB Review in 2004, which stated that Ofcom would develop a new approach to assessing the effectiveness of public service broadcasters, taken together, in delivering PSB purposes and characteristics (para 6.29, *Competition for Quality*). This report therefore provides an evidence base for monitoring the delivery of public service broadcasting (PSB). The designated PSB broadcasters are the BBC, ITV1, GMTV, Channel 4, Five, S4C and Teletext, and the main focus of the report is the last five years.

In particular, this report provides an evidence base for the current review of public service broadcasting, which is currently under way. Ofcom is tasked with assessing the current delivery of PSB and recommending ways of maintaining and strengthening the quality of public service broadcasting².

As well as providing a useful context for the PSB Review, the report aims to provide objective evidence to inform licensees' annual statements of programme policy (SOPPs) and self-assessment reviews (SARs). The report does not report on broadcaster compliance with quotas; these will be published in Ofcom's annual Communications Market Review later in the year.

This PSB report is framed according to the PSB purposes and characteristics set out in the PSB Review. These are outlined in Figure 1. While the key purpose of this report is to show how PSB as a whole is being achieved in the UK, it must also look at the contributions of the individual PSB channels.

This report is not an assessment of the individual performance of the public service broadcasters. Its purpose is to enable both Ofcom and its stakeholders to gain a deeper understanding of the current position of PSB delivery, and how this has changed over the last five years.

This is the second year of publication. We have incorporated a range of suggestions from stakeholders following last year's publication, and again welcome suggestions from stakeholders about any other elements of reporting that could be included or improved in future years.

Structure of the report

Overview of the UK television market: An overview of the UK television landscape, including key metrics relating to output and funding. This section also provides some contextual information about the position of the UK relative to other countries around the world.

Overview of UK television output and viewing: This section provides background and context in terms of PSB hours of output, by genre, over time, and the viewing patterns of

² *Ofcom's Second Public Service Broadcasting Review (Phase One: The Digital Opportunity)*

people in the UK at a general level, before particular genres are investigated in relation to the purposes and characteristics.

Overview of PSB purposes and characteristics: This section gives a summary of viewer perceptions of the overall importance of PSB and its delivery in general terms.

PSB purposes: These sections of the report take each PSB purpose in turn, and provide evidence of output and viewing trends over time, before focusing on how viewers characterise delivery of the individual purposes across each of the PSB channels.

PSB characteristics: This section takes each PSB characteristic in turn and provides evidence of delivery across the PSB channels.

Children's PSB: Output and viewing data about Children's programmes are contextualised with parents' views on Children's programmes provided by the PSB channels.

S4C: The contribution of S4C in terms of Welsh-language programming to the delivery of PSB purposes and characteristics, alongside output and BARB data on the channel.

Teletext: The contribution of Teletext to delivery of PSB purposes and characteristics.

Channel summaries: A short summary of how each channel is perceived by its viewers.

Additional genres: This section looks at output data, viewing figures and viewer opinions on some key genres that do not clearly fit within any one purpose or characteristic, but that may indirectly, or more broadly, be involved in the delivery of these.

Annex - selected non-PSB channels' and PSB portfolio channels' contributions to PSB: Audience perceptions of selected non-PSB channels are included for the first time, to provide useful context to the PSB channels. This is important, in the light of digital switchover, taking place over the next few years, the growth of digital TV in the UK and the focus of the current PSB review.

Annex - PSB online: The PSB channels' online presence is explored for the first time in this new annex. It is based on results from an online panel, who were asked about the PSB channels' websites in relation to the PSB purposes and characteristics. This section has been included to provide contextual information about the extent to which internet content is perceived in similar ways to that on TV.

Annex – perceptions and attitudes towards television: This annex contains information from the Ofcom Residential Tracker, showing trends in attitudes towards broadcasting more generally, including attitudes towards News, programme standards, the protection of children and attitudes towards television advertising. Some of the areas monitored have remained the same for several years.

The PSB context

Ofcom is charged by the 2003 Communications Act with assessing the effectiveness of the designated public service broadcasters (BBC³, Channel 3⁴, Channel 4, Five, S4C and Teletext), taken together, in delivering the public services purposes set out in the Act.

There are various ways that Ofcom currently monitors PSB, set out below.

Purposes and characteristics

Ofcom's PSB Review, conducted throughout 2004 and reporting in 2005, concluded that PSB should be defined in terms of purposes and characteristics, "designed to remain relevant over time, even as new technologies and media emerge to supplement, or eventually replace, more conventional broadcast channels". These purposes and characteristics are listed in Figure 1⁵.

Figure 1: PSB purposes and characteristics

<p>PSB purposes</p> <p>Informing our understanding of the world - To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas</p> <p>Stimulating knowledge and learning -To stimulate our interest in and knowledge of arts, science, history and other topics through content that is accessible and can encourage informal learning</p> <p>Reflecting UK cultural identity - To reflect and strengthen our cultural identity through original programming at UK, national and regional level, on occasion bringing audiences together for shared experiences</p> <p>Representing diversity and alternative viewpoints - To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere</p>
<p>PSB characteristics*</p> <p>High quality - well-funded and well-produced</p> <p>Original – new UK content rather than repeats or acquisitions</p> <p>Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones</p> <p>Challenging – making viewers think</p> <p>Engaging – remaining accessible and attractive to viewers</p> <p>Widely available – if content is publicly funded, a large majority of citizens need to be given the chance to watch it</p>

* Although *trust* is not a PSB characteristic as outlined in the PSB Review in 2004, it is considered alongside these characteristics throughout the report. The reasons for this are explained later in this section.

Although the PSB channels are expected to together fulfil the purposes and characteristics, within the PSB system it is also acknowledged that each PSB channel has a different remit

³ The BBC PSB channels are BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News 24 and BBC Parliament. BBC Parliament, CBBC and CBeebies are not included in this report in any depth, as the main focus is upon generalist channels, plus BBC News 24.

⁴ i.e. ITV1 and GMTV1.

⁵ The BBC has also developed a separate set of PSB purposes and characteristics. See BBC Annual Report for more details.

(with access to different funding sources and different institutional approaches). These are summarised by Ofcom as⁶:

- The BBC is the cornerstone of PSB, with special responsibility for investing in distinctive content and always striving to meet PSB purposes and characteristics.
- ITV1 focuses on News and high production-value origination from around the UK. ITV1 has a special additional responsibility for the provision of regional News, Current Affairs and other regional programming.
- Channel 4 has a specific remit for innovation, educative programming and distinctiveness.
- Five is primarily market-led with a focus on UK original production.
- S4C has a key role in Welsh-language public service broadcasting.
- Teletext has a remit for a range of high quality and diverse text material.

The PSB purposes and characteristics are deliberately looser than the formal quotas for annual hours of particular genres. Their development was in recognition of the fact that some television programme genres are becoming less distinct, and can vary significantly in the degree to which they can be described as 'PSB'.

However, this is not to say that analysis of genres cannot provide useful contextual information. Figure 2 sets out the programme genres that are deemed most applicable to each of the PSB purposes, and these are used as context in this report.

Figure 2: PSB purposes and their applicability to programme genres

PSB purpose	Most relevant programme genres
Purpose 1: Informing our understanding of the world	<ul style="list-style-type: none"> • News • Current Affairs
Purpose 2: Stimulating knowledge and learning	<ul style="list-style-type: none"> • Factual • Arts • Music • Education • Religion
Purpose 3: Reflecting UK cultural identity	<ul style="list-style-type: none"> • Regional News and non-News programmes <p>NB In the 2006 PSB Annual Report the following were reported in relation purpose 3, however these are now reported in the section 13 (as these genres may be contributing to the delivery of purposes and characteristics other than purpose 3):</p> <ul style="list-style-type: none"> ○ Sport ○ Drama ○ Comedy
Purpose 4: Representing diversity and alternative viewpoints	<ul style="list-style-type: none"> • No specific genres are explicitly linked to this purpose – many genres can support it

⁶ Phase 3 – Competition for quality: Ofcom review of public service television broadcasting, February 2005.

Statements of Programme Policy (SOPPs)

The annual process by which independent PSB broadcasters produce statements of programme policy, and reviews of the previous year's output, is a statutory requirement for broadcasters, introduced by the 2003 Communications Act.

Broadcasters are required to complete their statements and reviews each year in accordance with Ofcom guidance, which is published in the form of a Guidance Note. The independent PSB broadcasters are the ITV1 network; Channel 4; Five; GMTV⁷; Teletext; and the 15 ITV nations/regions⁸. The BBC and S4C have different arrangements, but nonetheless produce their own statements and reviews. The broadcasters' SOPPs for 2008 and reviews of 2007 were published in March. This report provides context for these publications.

Research methodologies

The main tools through which PSB is monitored in this report are as follows:

Output hours: the hours and minutes per week or year transmitted by broadcasters.

Viewing figures: who is watching the output, and for how long.

Audience impact: what viewers think of the output.

For the purposes of consistency, output hours, viewing figures, and audience impact are reported on for all genres and purposes/characteristics throughout this report. However, the text makes it clear where individual channels have a particular remit, or where channels should not be expected to make a PSB contribution.

There are a number of factors to note in relation to these data sources.

Output hours

The output data in this report are collected by Ofcom from the broadcasters each year, as part of their PSB returns. The period 2003-2007 is shown.

Genre definitions

It should be noted that programme classifications were updated in 2006 and therefore the figures for certain genres may be slightly different from earlier reported figures. These are noted in the narrative where relevant⁹.

A new structure for the allocation of programmes to genre categories became effective in 2006, to allow broadcasters more flexibility in the classification of programmes to particular genres. In time, this should allow a more detailed analysis of programme output, but since it has not been possible to go back and re-classify pre-2006 data, analysis of trends using the new breakdowns is not possible for the full five years reviewed in this report. Where possible, comparisons for 2006 and 2007 are given.

⁷ GMTV holds a separate licence from ITV1 and has separate obligations and commitments.

⁸ The English regional licences held in common ownership and the two SMG licences are able to submit consolidated statements and reviews. Individual statements and reviews are required from UTV, Channel Television and ITV Wales.

⁹ The full list of genre definitions are given in Annex 1.

The following changes should be noted in the composition of the figures for 2006 and 2007 as a result of the new methodology:

- Drama includes TV movies which were previously added to Films. Entertainment includes contemporary music but Comedy is now shown separately and includes situation comedy and scripted comedy.
- Specialist Factual includes Science & Technology, History, Nature & Wildlife and other documentaries.
- Other Factual includes Hobbies & Leisure, Factual Magazines, Consumer Magazines and General Factual.
- Factual Entertainment includes reality shows. In previous years some factual entertainment programmes were included within Entertainment.

Restated figures for 2006

In some cases, data for 2006 have been restated because the PSB Report last year contained some provisional figures which were subsequently updated once the final year-end data was audited and validated.

Definition of peak time

The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three and BBC Four peak time runs from 7pm (when broadcasting starts on these channels) to 10.30pm.

Viewing figures

These data are provided by BARB (Broadcasters' Audience Research Board), a panel of 5,100 homes providing TV measurement for the industry.

The majority of the analysis focuses on total annual viewing hours for genres¹⁰. The proportion of viewing of programme genres is also included, as is average weekly reach and audience share figures. The analysis provides viewing trends since 2003.

Most figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency.

Audience impact

The majority of the audience impact data come from Ofcom's PSB Tracker survey. The data were collected throughout 2006 and 2007, daily across four months – January, April, July and October – ensuring that there is as little as possible bias on perceptions due to seasonality. Over 7,500 viewers were interviewed each year by telephone; interviews were carried out by GfK NOP.

The survey asked (self-defined) regular viewers of each PSB channel their opinion of the delivery of PSB purposes and characteristics¹¹. The statements that they were asked about

¹⁰ This measure describes the total annual hours of viewing by an average individual of a given programme genre.

correspond to the purposes and characteristics as set out in Figure 3. Regular viewers are the focus in order to minimise hearsay and perception. Self-definition as a regular viewer (rather than a definition using the number of hours viewed on a particular channel) is used because viewers' opinions on the channel can be driven by *regular* viewing of programmes regardless of how many or few hours this involves¹².

Our assessment has been based on the main five channels, BBC Three, BBC Four and BBC News 24. It should be noted that BBC News 24 was included on the PSB Tracker from April 2007, and therefore data before this time do not focus on this channel. Please also note that BBC Parliament is not examined in this report, although it does contribute to the BBC's overall delivery of PSB.

More detail on methodology can be found in Annex 1.

The report also includes data from the BBC-GfK Pulse survey, an online, nationally-representative panel of 15,000 viewers. Over 5,000 responses are collected each day. Panellists are presented with the previous day's schedules for all the main five channels plus BBC Three, BBC Four, E4 and Sky One. Once they have selected the programmes they viewed they are asked a number of questions about them. Panellists only score programmes they have chosen to watch, and therefore they will generally be scoring programmes they enjoy. In this report, scores are presented at genre level, and by responses, not respondents. Please see Annex 1 for more detail on methodology.

¹¹ Viewers are asked to rate each channel (and the channels taken together) out of 10 in relation to statements that reflect elements of the purposes and characteristics, and the top four scores (7-10) are used to calculate responses, correlating to a 'very/quite associated' response. This is described throughout the report as being 'rated positively on', 'strongly associated with' or 'rated well upon'.

¹² Also, asking respondents to gauge how many hours per week they watch on a particular channel would involve a level of estimation and in turn could reflect their *perceived* relationship with the channel, rather than strict hours of viewing.

Figure 3: PSB purposes and characteristics and their alignment with PSB Tracker statements

PSB purposes and characteristics	PSB Tracker statements * Statements added to the PSB Tracker for 2007
Purpose 1: To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas	Its news programmes are trustworthy Its programmes help me understand what's going on in the world today
Purpose 2: To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning	It shows interesting programmes about history, sciences or the arts As a result of watching its programmes I've become more interested in particular subjects
Purpose 3: To reflect and strengthen our cultural identity through original programming at UK, national and regional level, and by occasionally bringing audiences together for shared experiences	It covers big national events well, like sports, music events or major news stories Its entertainment and factual programmes show people from different parts of the UK It shows high quality Soaps or Drama made in the UK It portrays my region well to the rest of the UK Its regional news programmes provide a wide range of good quality news about my area Provides a wide range of high quality and UK-made programmes for children* Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation
Purpose 4: To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere	Its programmes show different kinds of cultures and opinions within the UK
High quality – well funded and well produced	It shows well-made, high quality programmes
Original – new UK content rather than repeats or acquisitions	It shows enough new programmes, made in the UK
Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones	It shows programmes with new ideas and different approaches
Challenging – making viewers think	It shows programmes that make me stop and think
Engaging – remaining accessible and attractive to viewers	It shows programmes I want to watch Its programmes reflect the interests and concerns of people like me
Trust ¹³	I trust this channel*

¹³ This was included as a statement in the PSB Tracker in order to monitor the extent to which trust is assigned to the main PSB channels as the digital TV environment expands. The statement was also included partly as a result of the issues surrounding phone votes within programmes on the PSB channels and in order to understand opinions on the channels after the resolution of this.

Programme genre definitions

The output hours and viewing figures use different datasets, which have slightly different programme classifications. The main differences are shown in Figure 4 below, which also provides illustrative programmes for the various genres as classified by the output hours.

Figure 4: Comparison of selected programme genre classifications and illustrative programme titles

Genre	Illustrative programmes	Output hours	BARB viewing figures
News		<ul style="list-style-type: none"> Excludes regional news GMTV output is divided between News, Current Affairs, Factual, and Children's 	<ul style="list-style-type: none"> Includes <i>Newsnight</i> on BBC Two GMTV output is divided between News and Other Factual (for features) Does not include regional News
Current Affairs	<ul style="list-style-type: none"> <i>Question Time</i> (BBC One) <i>Newsnight</i> (BBC Two) <i>Tonight with Trevor McDonald</i> (ITV1) <i>Dispatches</i> (Channel 4) <i>The Wright Stuff</i> (Five) 	<ul style="list-style-type: none"> Excludes consumer affairs (which is categorised under General Factual) Includes <i>The Wright Stuff</i> on Five 	<ul style="list-style-type: none"> Includes political, economic, social, consumer affairs Does not include <i>The Wright Stuff</i> on Five, which is classified as Entertainment
Other Factual	<ul style="list-style-type: none"> <i>Watchdog</i> (BBC One) <i>Gardener's World</i> (BBC Two) <i>60 Minute Makeover</i> (ITV1) <i>A Place in the Sun</i> (Channel 4) <i>Hotel Inspector</i> (Five) 	<ul style="list-style-type: none"> Includes consumer affairs, factual entertainment, leisure and hobbies, talk shows and factual magazine shows 	<ul style="list-style-type: none"> Includes human interest, factual entertainment, hobbies and leisure
Specialist Factual	<ul style="list-style-type: none"> <i>One Life</i> (BBC One) <i>Horizon</i> (BBC Two) <i>Commando: On the Front Line</i> (Channel 4) <i>Empire's Children</i> (Five) 	<ul style="list-style-type: none"> Includes natural history, science and technology, history, other documentaries and special events 	<ul style="list-style-type: none"> Includes natural history, science and medical, history, factual Drama
Education	<ul style="list-style-type: none"> BBC Learning Zone Channel 4 Schools 	<ul style="list-style-type: none"> Includes formal education and Schools programmes 	<ul style="list-style-type: none"> Includes schools' programmes
Entertainment	<ul style="list-style-type: none"> <i>My Family</i> (BBC One) <i>Never Mind the Buzzcocks</i> (BBC Two) <i>The X Factor</i> (ITV1) <i>The IT Crowd</i> (Channel 4) <i>Cooking the Books</i> (Five) 	<ul style="list-style-type: none"> Includes Comedy and sitcoms Includes contemporary music 	<ul style="list-style-type: none"> Includes contemporary music Includes Comedy for overviews; although UK comedy is separated off for analysis of PSB purpose 3
Originated Drama	<ul style="list-style-type: none"> <i>Life on Mars</i> (BBC One) <i>Party Animals</i> (BBC Two) <i>Heartbeat</i> (ITV1) <i>Shameless</i> (Channel 4) 	<ul style="list-style-type: none"> Includes 'made for TV' films Includes Factual Drama 	
Originated Soap	<ul style="list-style-type: none"> <i>Coronation Street</i> (ITV1) <i>EastEnders</i> (BBC One) 	<ul style="list-style-type: none"> Excludes <i>The Bill</i> 	<ul style="list-style-type: none"> Includes <i>The Bill</i>
Films		<ul style="list-style-type: none"> Excludes 'made for TV' films 	<ul style="list-style-type: none"> Includes 'made for TV' films

Section 1

Overview of the UK television market

Introduction

This section provides an overview of the UK television landscape, including key metrics relating to output and funding. Contextual information about the position of the UK relative to other countries around the world is also included.

Key themes

Availability of TV content

- The continued increase in broadband take-up and average headline speeds supported growth of two alternative delivery mechanisms to traditional TV platforms.
 - BT Vision and Tiscali have both established Internet Protocol Television (IPTV) propositions and are continuing to develop their offerings and broaden their reach.
 - TV services distributed over the internet are also growing in number and prominence, with 2007 seeing the launch of BBC's iPlayer and ITV streaming live content via itv.com.
- The BBC and ITV also plan to launch a free satellite service in 2008, enabling consumers to receive 200+ TV and 100+ radio channels without any subscription charges (although with initial charges for set-up and hardware). In addition, this will offer access to HD content and advanced interactivity.

Digital TV take-up

- Nearly nine in ten homes (87%) received digital television channels on their main set by the close of Q4 2007 (up from 85% in September 2006); the primary driver of digital growth was the take-up of Freeview on the DTT platform.
- The total number of television sets (main or secondary) converted to multichannel reached 61% by the end of Q4 2007, up from 49% at the end of 2006.

Digital TV consumption patterns

- Consumers are also increasingly able to control their content consumption patterns through time-shifting:
 - The growth of time-shifted versions of PSB channels continued, with Five US+1, Five Life +1 and Channel 4 +1 launching in August 2007.
 - Digital Video Recorders (DVRs) also enable time-shifting of live TV through record, rewind, and fast-forward functionality. In 2007 17% of UK households claimed to have a DVR in the home.
 - Consumers are also continuing to use mobile content to place-shift their media consumption.

TV sector revenues

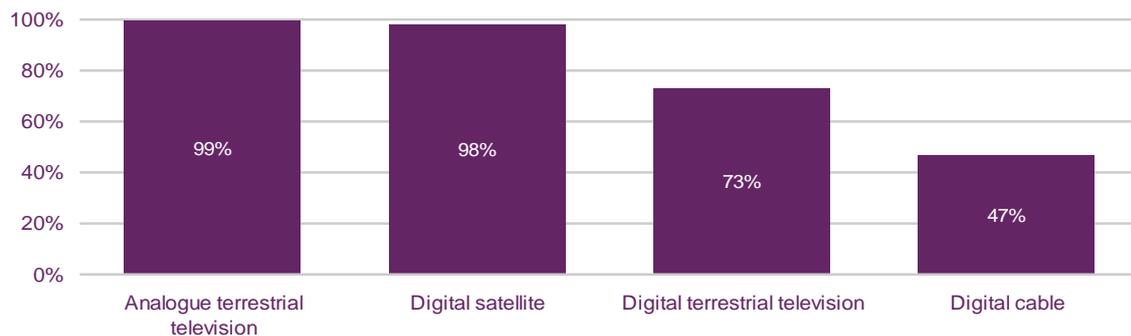
- Overall revenues from subscriptions, net advertising and the licence fee are estimated to be £10,441m in 2007, an increase of 4.7% on 2006. Within this overall figure, we estimate that the proportionate increase in subscription revenue ran to double digits - driven by further growth in satellite and cable subscribers and in average retail revenue per subscriber. By contrast, we estimate industry NAR was down 5%.

Platform availability

The availability of traditional television platforms (Figure 1.1) as measured by the proportion of the UK population covered, has not changed significantly in the last year. Both analogue terrestrial television and digital satellite already offer over 95% availability. The proportion of the population which can receive all six television multiplexes via digital terrestrial television (DTT) is not likely to increase beyond 73% until digital switchover is complete and the digital signal, with its greater coverage, has replaced the analogue signal.

Figure 1.1: Availability of television platforms

Proportion of population covered (percent)



Source: Ofcom, 2007

Alternative ways of delivering content

Alongside these traditional platforms, the continued increase in take-up of broadband and in average headline speeds have both supported take-up of alternative delivery mechanisms, because high speed broadband enables people to watch TV content of a reasonable quality online:

- Fifty-seven per cent of homes had taken broadband services by the end of the last quarter of 2007;
- Average broadband headline speeds¹⁴ increased from 1.6Mbit/s at the end of 2005 to 5.3Mbit/s at the end of 2007

¹⁴ Average headline speeds, or blended headline speeds, are the maximum speed attainable.

IPTV¹⁵ propositions develop and availability widens

- BT Vision was launched in 2006 and offers a hybrid DTT/IPTV service. It combines a set-top box (STB) able to receive Freeview (provided the household is within the 73% of the UK population covered by DTT) with additional pay-per-view and on-demand services through IPTV (available to consumers able to receive BT broadband). BT Vision has a reported 150,000+ subscribers, just over a year after its launch in early December 2006.
- Tiscali (formerly Homechoice) operates an IPTV model, broadcasting a set of linear channels (similar to the Freeview line-up) with additional catch-up and on-demand services. Originally serving parts of London, Surrey and Hertfordshire, Tiscali has been rolling out its offering to other parts of the UK. Parts of Central, Northern and North East England and parts of Scotland can now also receive Tiscali TV. Tiscali reports that it aims to have a reach of over 10 million homes by the end of 2008 and reported c36,000 subscribers as of 31 October 2007.

TV services distributed over the internet are growing in number and prominence

The internet as a distribution platform for audiovisual (AV) content continued to grow in significance in 2007.

- Channel 4 and the BBC launched on-demand internet content over three years ago with the launch of *4Docs* and 'watch again' access for specific programme series respectively.
- In the summer 2006, Channel 4 launched live streaming of its channels - although excluding those programmes for which it had not acquired live online rights. This was followed by the launch of a pay-per-view, on-demand download service called 4oD. By the end of February 2008, 4oD had achieved over 100 million views since its December 2006 launch, with six million shows streamed in 2008 alone. 4oD is used by 3.3 million viewers, one million of them through their PCs and the remainder via their TVs on Virgin, BT Vision or Tiscali platforms¹⁶
- Five launched its on-demand service, Five Download, in October 2006, focusing on pay-per-view offerings of *CSI* programmes and *Grey's Anatomy*.
- ITV Plc launched live streaming of all its networks in June 2007, along with streamed on-demand access to recently-aired episodes of *Coronation Street* and *Emmerdale*. Access is via the itv.com portal, is free to view and supported by some advertising. ITV.com recorded around 2 million views of full-length TV shows and clips in January, according to its own figures.
- The BBC launched iPlayer in 2007, offering a free-to-view, on-demand catch-up service for programmes transmitted on BBC's channels in the past week. BBC figures show that between its full launch on Christmas Day and 12 February 2008, BBC TV shows have been streamed or downloaded more than 17 million times via the iPlayer.

¹⁵ Internet Protocol Television is television and/or video signals that are delivered to subscribers or viewers using Internet Protocol (IP), the technology that is also used to access the Internet. Typically used in the context of streamed linear and on demand content, but also sometimes for downloaded video clips.

¹⁶ C21 Media 27 Feb 2008

- In December 2007, Sky re-branded its broadband download service as Sky Anytime, making Sports, Films and Drama series available as PC downloads to Sky and non-Sky customers through a mix of free, pay-per-view, subscription and buy-to-own models.

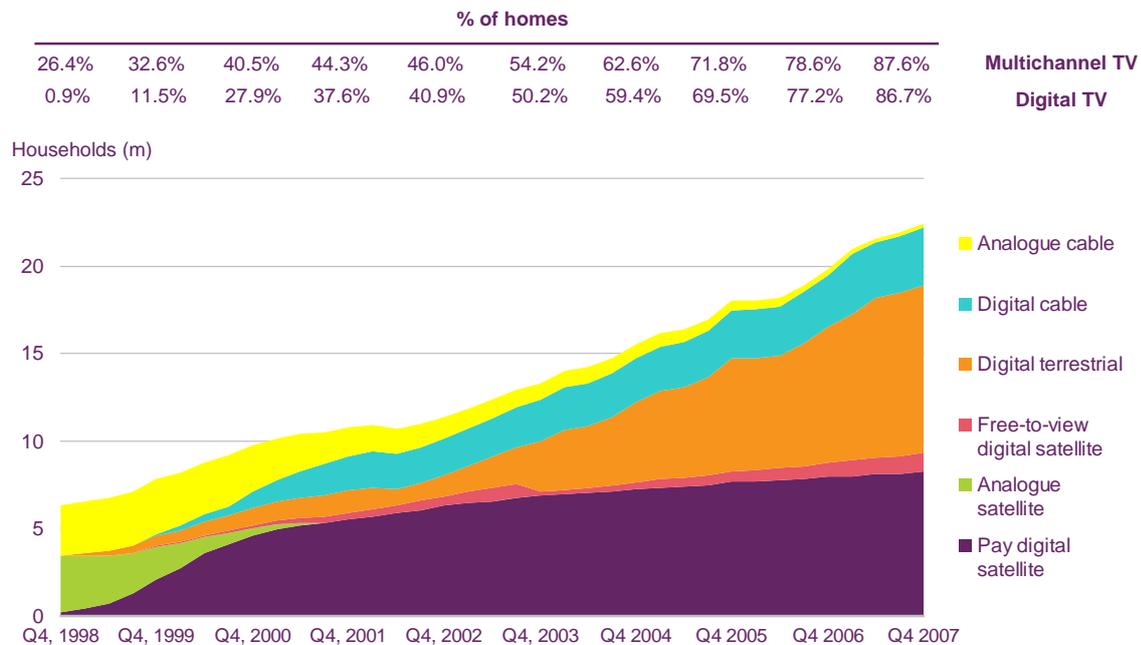
Digital television take-up and market share

Freeview on DTT driving digital take-up

Figure 1.2 shows that the primary driver of digital growth was the uptake of Freeview on the DTT platform. Of the DTT devices sold in 2007, sales of integrated digital TVs (IDTVs) accounted for just over half at around 5.3 million, having experienced a 117% increase on the previous year. Sales of set-top boxes grew by almost 31% year-on-year to around 5.0 million in 2007.

The platform’s growth may explained by changes in Freeview content, greater awareness and understanding of digital switchover, the price of DTT set-top boxes, the flexibility of additional pay-TV services available over the platforms, and the growing sophistication of DTT DVR devices.

Figure 1.2: Digital TV take-up, Q4 2007



Source: Ofcom, GfK, Sky, Virgin Media

Digital TV penetration reaches 87%

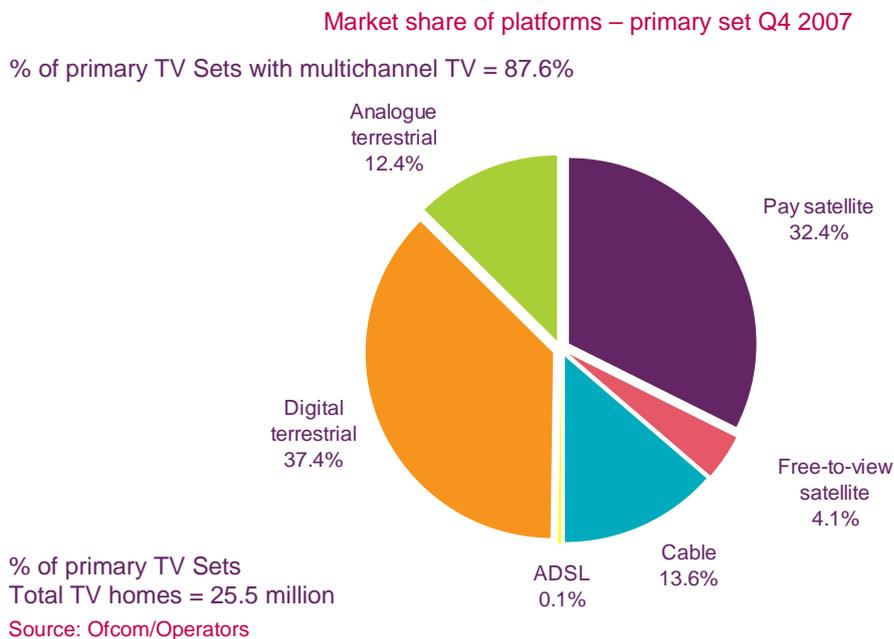
Nearly nine in ten homes (87%) received digital television channels on their main set by the close of Q4 2007, up from 85% in September 2006 (See Figure 1.3).

In addition to the these UK households receiving digital television on their primary set in Q3 2007, a further 1% subscribed to analogue cable services, bringing the number of homes receiving some form of multichannel television on their main set to 88%, as shown in Figure 1.3.

The proportion of homes with Freeview on their main set is 37% and the proportion with a pay satellite set-top box is 32%. An estimated 4% of UK households received digital television through free-to-view satellite services on their main TV set, either as a result of

acquiring dedicated free satellite equipment or having churned from subscription services and now watching only the free channels. This looks set to rise further in 2008 with the launch of a 'Freesat' service by the BBC and ITV.

Figure 1.3: Market share of platforms – primary TV set, Q4 2007

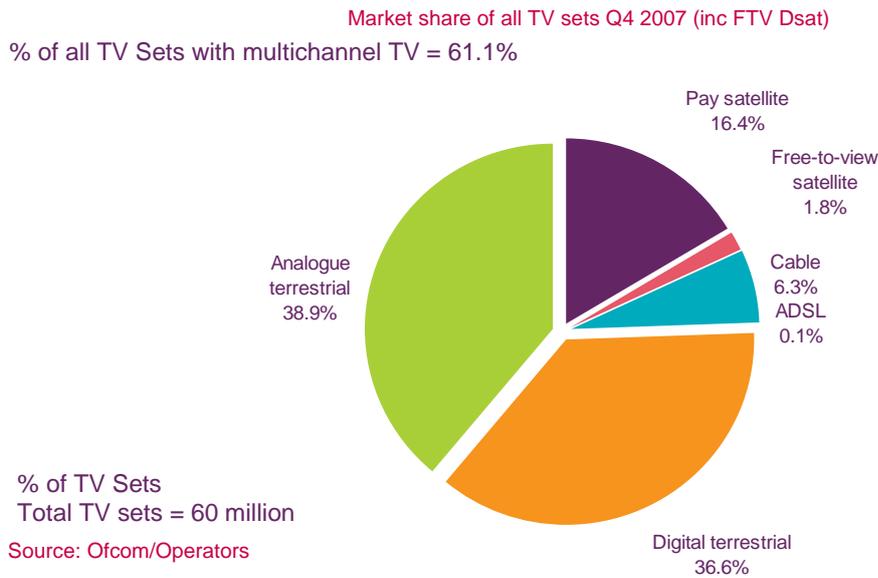


NB The cable figure includes 1 percentage point of analogue cable

Digital overtakes analogue as the most prevalent service across all sets

Figure 1.3 shows the service used on the primary set in the household, whereas Figure 1.4 looks at the services used on **all** TV sets in UK households. The majority of the approximately 60 million television sets in the UK now receive multichannel TV. The total number of television sets (main or secondary) converted to multichannel reached about 61% by the end of Q4 2007, up from 49% at the end of 2006.

Figure 1.4: Market share of all TV sets Q4 2007 (inc FTV DSat)

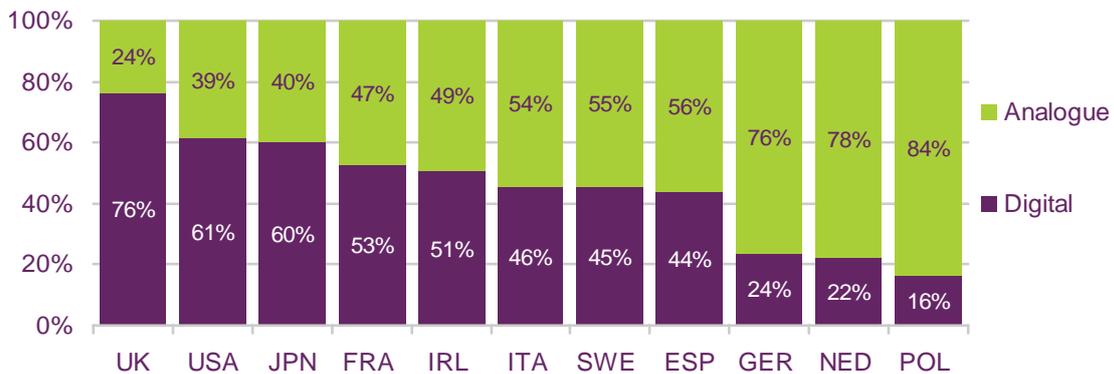


Digital TV take-up: 2006 international comparisons

The UK continues to lead the world in take-up of digital television services in 2006, as Figure 1.5, taken from Ofcom’s 2007 *International Communications Market* report, shows. The proportion of homes connected to a digital platform in the UK in 2006 was 15 percentage points higher than in the US, the country with the next highest penetration of digital television. This lead may be explained by the relatively early launch of digital television in the UK (1998) and the recent rapid adoption of DTT.

Figure 1.5: Proportion of homes connected to digital and analogue platforms, 2006

Proportion of homes (%)



Source: World Television markets 2007 (IDATE)

Consumption patterns

Alternative ways of consuming content – time-shifting becoming mainstream as DVR penetration continues to grow

In 2007 the PSBs continued to expand their digital channel portfolios and provided consumers with the flexibility to view time-shifted versions of these channels (see Figure 1.6).

The BBC launched the first PSB portfolio channel in 1997, while ITV followed a year later with ITV2. More recent launches included CITV, Film4, Five Life and Five US.

New portfolio launches have been complemented by the introduction, by the PSBs, of time-shifted versions of their digital channels. Channel 4 led the way in 2002 and 2005 with E4+1 and More4+1. In 2006, ITV2+1 and ITV3+1 were introduced. In 2007 Five launched time-shifted versions of its channels and Channel 4 become the first PSB to time-shift its parent channel.

Figure 1.6 PSB portfolio channel launches in 2006/07

Operator	Channel	Launch
ITV	CITV ITV Play ITV2+1 ITV3+1	March 2006 March 2006 (closed March 2007) October 2006 October 2006
Channel 4	Film4* Film4+1 Channel 4+1	Relaunched July 2006 July 2006 August 2007
Five	Five Life Five US Five Life+1 Five US	October 2006 October 2006 August 2007 August 2007

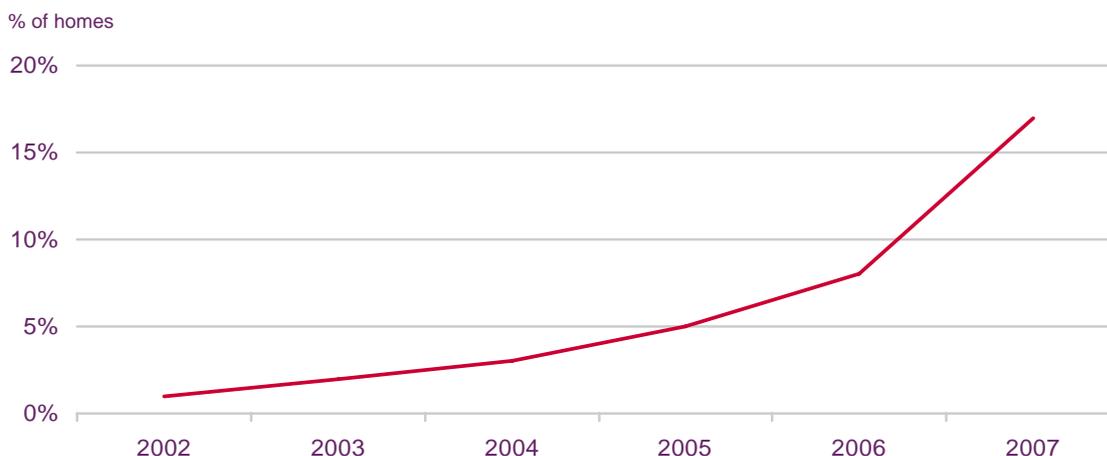
* Originally subscription only service

*Originally subscription-only service

Consumers are also taking greater control of the way they consumer content through the ownership and use of digital video recorders (DVRs). A DVR is a digital TV set-top box which includes a hard disc drive, allowing users to time-shift their viewing through recording, pausing and rewinding live TV.

In 2007 Ofcom research found that 17% of the UK population reported having a DVR in the home, compared to only 5% in 2005. The earliest brand of DVR introduced to the UK was TiVo, in 2000, which launched in partnership with Sky; Sky followed up with its own product, Sky+, in 2001. Top Up TV Anytime and the Telewest TV drive, (now called V+ following the rebranding to Virgin Media) both launched in 2005, and Freeview Playback was unveiled in 2006. BT Vision was launched in December 2006.

Figure 1.7 DVR penetration in all homes



Source: Ofcom Tracking study

According to BARB figures, approximately 15% of all viewing in Sky+ homes in the 12 months to March 2007 was time-shifted, rising to 19% in peak time. Approximately 47% of time-shifted viewing took place on the same day as the original broadcast. There were demographic differences, with women watching marginally more time-shifted programming than men (1% more across the day, rising to 2% in peak) and 35-54 year olds time-shifting more than any other age group.

High-definition (HD) TV supply and demand growing

Sky and Virgin Media currently offer HD services within the UK over satellite and cable platforms respectively. The proposed 2008 launch of a free satellite service by the BBC and ITV has the potential to bring wide availability of HD on a free-to-air basis, with substitution implications for non-HD content and non-HD platforms. As a result of a technology upgrade, viewers across the UK will also be able to access programmes broadcast in HD through DTT as digital switchover is completed.

Figure 1.8: Comparison of high-definition services, June 2007

Platforms	Satellite	Cable	DTT
Provider	BSkyB	Virgin Media	BBC Trial – limited period
Launch date	April 2006	December 2005	June 2006
Customer terms and conditions -content, channels on offer -Subscription fees, one-off payments	£299 set-top box with HD subscription, £399 without, £30 installation fee (free with multiroom subscription), £10/month additional subscription fee on top of the standard Sky Digital subscription.	£150 charge to install the V+ set top box. Then £5 a month if you're on TV M or L packages. If you're on TV XL there's no monthly charge.	Free trial for 450 homes in London. Available on PSB-Sat.
Services offered	Sky One HD, Sky Sports HD (2 channels), Sky Movies HD (2 screens), Sky Box Office HD (2 screens), Artsworld HD, BBC HD, Discovery HD, National Geographic HD, and The History Channel HD. Pay-per view films from Sky Box Office Includes Sky+ functionality (up to 80 hours of PVR storage).	BBC HD is the only broadcast channel on offer, other HD programmes are available on demand. V+ includes an 80 hour PVR and 2000+ hours of on-demand content.	Channels on offer were BBC HD, ITV, Channel 4 and Five
Number of subscribers	292,000	150,000	450

In 2007 Ofcom commissioned research among 400 HD subscribers, to understand the impact of the service on television viewing behaviour¹⁷. Forty-three per cent claimed that their TV consumption had increased since taking HD; of those, a third (36%) said they watched six or more additional hours a week. HD owners reported that HD viewing constituted roughly one-third of their total viewing time. They claimed to stay committed to certain channels, yet shifted from non-HD to the HD versions when these were available. The introduction of HD channels may have an impact on the programme genres which

¹⁷ It is important to note that these findings are indicative only. Self-reported levels of viewing may not accurately reflect actual levels of viewing, and any increases in viewing time might not be entirely attributed to HD (e.g. it might be related to viewers purchasing HD-ready sets with larger screens, which may influence them to watch more TV). Furthermore, HDTV is still a new service so viewing patterns may be the subject of a novelty effect and not indicative of long-term behavioural changes.

viewers choose to watch. Forty-three percent claimed to watch more Film, and 39% more Sports since getting HDTV, which is possibly explained by the wider availability of HD content in these genres than in others.

UK television industry revenues

Overall revenues from subscriptions, net advertising and the licence fee were estimated to be £10,441m in 2007, an increase of 4.7% on 2006. This excludes revenue from pay-per-view, retail and interactive services.

Within this overall figure, provisional estimates point to a double-digit increase in subscription revenue and a decrease in advertising revenue, as shown below in Figure 1.9.

Figure 1.9: TV industry revenue by source



Source: Operator returns, agency figures and Ofcom estimates

* Ofcom has not yet received all confidential financial operator returns for the calendar year 2007, and these figures are based on other sources. They may change in subsequent publications

Why and how were 2007 revenue estimates derived?

Ofcom has not yet received financial returns from operators for the calendar year 2007. We have, therefore, relied instead on estimates for TV industry subscription revenue, net advertising revenue and the licence fee allocated to television output.

Subscription revenue consists of two components. Satellite subscription revenue is drawn directly from BSkyB's published quarterly results. Cable subscription revenue is an estimate based on Ofcom's view on the proportion of total revenue from Virgin Media that is derived from television subscription services (as opposed to fixed-line telephony, broadband access or mobile telephony).

Net advertising revenue (NAR) is drawn from agency estimates sourced from MediaTel, and in the case of ITV, annually reported figures). NAR figures from Mediatel for the terrestrial channels have historically tied in well to the figures we derive from our operator returns, so we believe them to be accurate. NAR estimates for digital-only channels are subject to a greater margin of error. Based on historical differences between these estimates and operator returns, we have adjusted upwards the estimates by 16%,

An estimate of the 2007 licence fee that is allocated to TV-based output is derived from historic BBC data on direct expenditure on TV-based output, along with Ofcom estimates of the proportion of overheads that can be allocated to TV-related services. The licence fee base is estimated using a weighted average household licence fee for 2007 along with the known number of licences in force in 2006/07.

The rise in subscription revenue may be explained by further growth in satellite and cable subscribers and in average retail revenue per subscriber (which in the case of Sky could

reflect a rise in the cost of subscription packages and the increasing penetration of additional products such as HD and multiroom).

The BBC licence fee

The BBC's new licence fee settlement, announced by the Department for Culture, Media and Sport (DCMS) in January 2007, came into effect in April 2007. Between April 2007 and March 2008, the licence fee cost £135.50, up 3% year-on-year. In April 2008, it rose by a further 3% and in each of the subsequent three years will rise by 2%, reaching £151.50 in 2012. It should be noted that with these future licence fee increases, the real value of the 2007 settlement will be determined by UK inflation rates.

Net advertising revenues (NAR)

Overall, NAR was down 5% in 2007 to £3.3m (see Figure 1.10). ITV1 and Channel 4's revenues fell by 4.5% and 1.7% respectively, offset by a 1% rise for Five and a 7.5% rise in multichannel NAR.

Figure 1.10: Net advertising revenue by sector, 2007



Source: Licensees, Ofcom analysis and Mediate1

Television revenues: 2006 international comparisons

Ofcom's 2007 International Communications Market publication showed television industry revenue per head for a sample of countries. This analysis (Figure 1.11 below) indicated that the UK TV industry was comparatively well-funded, both from commercial and public sources. It was second only to the US in television industry revenue per head, with £166 received per head of population.

Figure 1.11: Television industry revenues per head, 2006

Revenues per head (£)



Source: World Television Markets 2007, IDATE and Ofcom analysis

As Figure 1.12 below shows, advertising constituted 35% of total TV industry revenue in the UK, at £58 per head. The remaining amount was split between subscription revenues (40% at £67 per head) and public funds (25% at £41 per head). This breakdown of funds is broadly similar to that in France, Holland, Sweden and Ireland, but contrasts with the US, Italy, Poland, Japan and Spain, whose industries are over 50% funded by advertising. Of the sample, Germany is most dependent on public funding, at 36% of total revenue. These patterns of industry funding are consistent with the data presented in last year's report, with the exception of Spain, for whom advertising revenue's share has fallen 14 percentage points - from 68% to 54%.

Figure 1.12: Sources of industry funding by country, 2006



Source: World Television Markets 2007, IDATE and Ofcom analysis

Note: Figures inside the bars represent industry revenue per head

Section 2

Overview of PSB output and viewing

Introduction

This chapter provides an introduction to the viewing patterns of people in the UK at a general level. It looks at the share and reach of channels as well as levels of output and viewing of different genres on the PSB channels.

The main focus is upon the five main PSB channels rather than a wider group including the BBC digital channels, in order that, for example, children's output on the digital channels does not distort the proportions of output being described. This is highlighted as it occurs in the text. Later sections provide details of output and viewing, including BBC Three, BBC Four, BBC News 24 and S4C. There is also a separate section examining Children's programming.

This section aims to give a broad overview, while sections 4 to 8 examine the output data, viewing figures and audience impact in relation to each purpose and characteristic in more detail.

Key themes

Overall viewing figures

- The 15-minute consecutive reach of all the main five channels together in 2007 remained stable compared to 2006 levels. Reach of multichannel television increased from 64% in 2006 to 69% in 2007.
- The combined audience share of the five main channels continued to decrease in all homes in 2007. Decreases were seen in peak time (from 74% to 71%) and all day (from 67% to 64%). Share for multichannels increased at the expense of the main channels.
- Across the whole day, Channel 4 saw the largest decrease in audience share in 2007 with ITV1 showing the greatest drop in peak time.
- Share of viewing of the main five channels on cable and satellite has remained relatively stable from 2006 and in 2007, at 48%. Share in homes with Freeview continued to fall from 71% to 67%.
- In order to compete in the digital environment, the five main channels have developed portfolios of digital channels which were compensating for reduced share of the parent channel. The PSB broadcasters family of channels, including the digital portfolio channels are competing strongly in the multichannel environment:
 - The BBC's family of channels and ITV's family of channels maintained significant share in 2007, at 31% and 22% respectively, in multichannel homes.
 - Channel 4's family of channels held 11% of the share and Five has benefited from its 2006 portfolio channel launches with a small uplift in its overall audience share to 6% in 2007.

Audience profiles

- Of the main five channels, Channel 4 had the highest proportion of people aged under 35 (25%, excluding children) and Five also tended to have a younger viewer profile. BBC One and ITV1 had very similar age profiles. BBC Two had the highest proportion of over-65s in its audience (34%).
- In 2007 44% of BBC One's audience was in the ABC1 socio-economic group, compared to 37% of ITV1's. Five had the highest proportional share of people from socio-economic group DE (47%). This overall picture has not changed significantly since 2006.

PSB output hours

- All-day output of first-run originated programmes on the main PSB channels increased in 2007, largely driven by an increase in the amount of late night phone-in quiz programmes on ITV1 and Five, which were produced in-house or commissioned.
- Over the whole day, there were increases in the proportion of Factual and Drama (including Soaps) output across the PSB channels together. Over the last five years, other PSB programme genres - particularly Education and Children's - showed decreasing volumes. (Later sections of this report explore these trends in more detail).
- In peak time, the programme mix for the main five channels, taken together, has been broadly stable since 2003, with the exception of factual programming which has increased as a proportion of the schedule from 23% in 2003 to 30% in 2007 and Film, Arts and Religion, which have decreased over this period.
- The mix of genres shown in peak time in 2007 shows the key areas of focus for each channel;
 - The BBC One schedule contained the highest proportion of News (20%), compared with the other channels.
 - BBC Two was largely information-led, with 62% of its schedule being Current Affairs, Factual programmes, Religion, and Arts & Classical Music.
 - Drama and Soaps predominated on ITV1 in peak time (47%) with Entertainment also being an area of focus (19%).
 - Channel 4 showed a high proportion of information and factual programmes, with 20% of its peak-time schedule consisting of News and Current Affairs, and 30% Arts, Religion and Factual output, in addition to 13% of Factual Entertainment – the highest proportion of all five channels.
 - Five's peak time was more narrative-led, with 31% consisting of Drama and Soaps, and a higher proportion of Films (19%) than the other main PSB channels.

Viewing of different types of programmes

- Overall, average total weekly reach, across all of the main five channels and across all genres remained static between 2006 and 2007 are compared, but have declined over the last five years.
- The most marked declines in average weekly reach over the last five years have been in the Children's, Film and Music genres.

- Compared to 2006, weekly reach of all genres on PSB channels either stayed static or dropped slightly in 2007, apart from Hobbies & Leisure, and Current Affairs, which both increased.
- In peak time, the proportion of viewing of each PSB genre has been fairly stable, although viewing of Films has fallen steadily since 2003 and viewing of Other Factual has grown, reflecting changes in output of these genres over this time.
- The picture is more changeable for all-day viewing; shares of viewing of Current Affairs, Specialist and Other Factual have all increased from 2003 levels. Viewing of the Children's genre has decreased over the period (see Section 9 for more detail on this).
- Proportions of viewing vary according to the channel and time of day.
 - In peak-time viewing in 2007, Drama and Soaps comprised the bulk of viewing on ITV1, in line with the output on the channel.
 - Other Factual dominated peak-time viewing on Channel 4 (47%), compared to 37% on BBC Two. However, Specialist Factual accounted for 17% of viewing on BBC Two, compared to just 5% of viewing on Channel 4.
 - Drama (excluding Soaps) dominated viewing on Five. Viewing on BBC One was the most varied between genres.
 - Viewing on BBC One was the most varied across genres.

Channel viewing figures

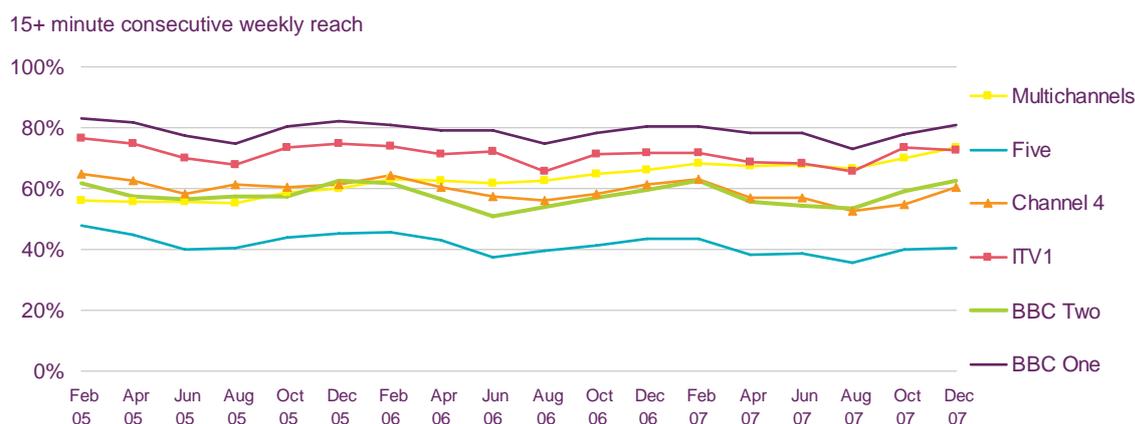
Reach

Reach data sets out the number of people aged 4 or over who watch at least 15 consecutive minutes of a genre or channel in an average week. Figure 2.1 shows the average reach of the main five channels since 2005, compared to multichannels taken together. It shows that viewing of the PSB channels is affected by seasonality, with lower viewing on the channels over the summer.

The 15-minute consecutive reach of all the main five channels together in 2007 remained stable compared to 2006 levels. Reach of multichannel television continued to increase; from 64% in 2006 to 69% in 2007.

The average 15-minute reach in 2007 was 78% for BBC One, 70% for ITV One and 69% for any multichannels. Channel 4 and BBC Two both received an average weekly reach of 58% while fewer people watched Five (40%).

Figure 2.1: Weekly TV reach in all homes (all day)



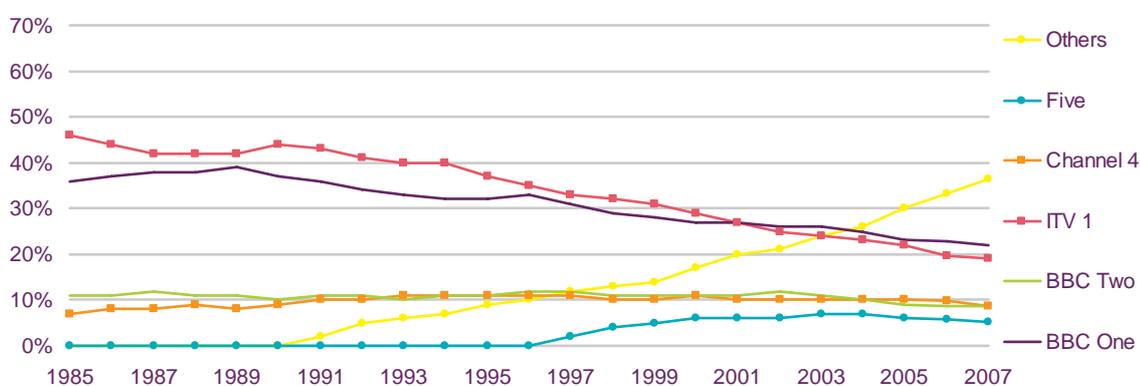
Source: BARB

Share in all homes¹⁸

Figures 2.2 and 2.3 show the share of each of the main five channels, and the sum of all other multichannels, since 1985 and 1992.

The long-term trends in share continued in 2007, with the combined share of the five main channels, across the whole day, and in all homes, dropping a further 3% to 64%. The share for the multichannels continued to grow, up 3% in 2007 to 36%. Channel 4's share across the whole day decreased the most, down by one percentage point, although was still holding a narrow lead over BBC Two.

Figure 2.2: Channel shares in all homes, 1985-2007



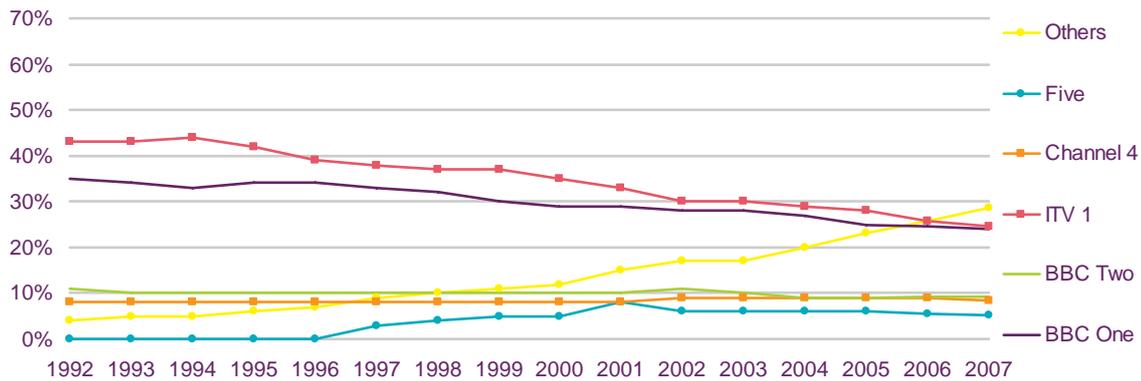
Source: BARB

When examining peak time in particular, combined share of the main PSB channels fell by around 3% in 2007, to 61%. The combined share of the multichannels in peak time (29%) now surpasses the share of each of the individual PSB channels.

ITV1 saw the greatest drop in audience share in peak time (1%), narrowing its lead over BBC One as the most-watched channel in peak time. BBC Two's audience share held firm, consolidating its narrow lead over Channel 4.

¹⁸ Share of viewing is the percentage of the total viewing audience watching over a given period of time.

Figure 2.3: Peak-time channel share in all homes, 1992 – 2007

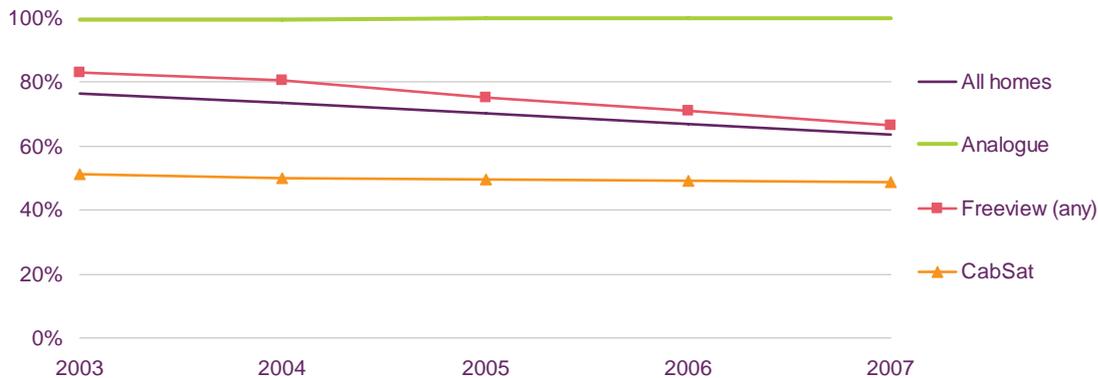


Source: BARB

Share in multichannel homes

Figure 2.4 shows the main five PSB channels' share in homes with different platforms. As in all homes, the share of the main PSB channels in homes with Freeview is decreasing over time; in 2007, combined share in Freeview homes dropped by 4% to 67%. Share of viewing of the main PSB channels on cable and satellite remained much more stable, and in 2007 had 48% of all viewing.

Figure 2.4: Five main PSB channels' share in homes with different platforms

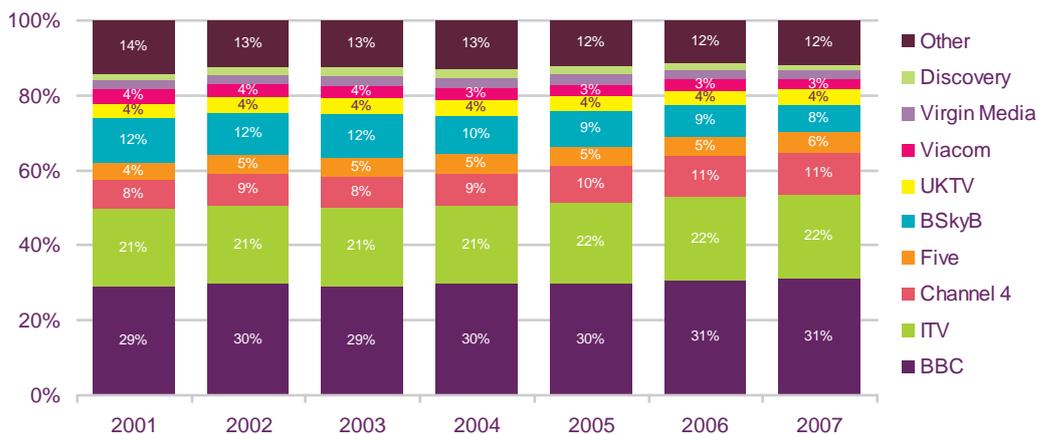


Source: BARB

In multichannel homes the five main channels face significant competition, but in order to compete in the digital environment they have developed digital channel portfolios which were 'compensating for reduced share on the parent channel.

As shown in Figure 2.5, the BBC family of channels and the ITV family of channels both maintained significant share in 2007, at 31% and 22% respectively in multichannel homes. Channel 4's full set of channels held 11% of the share in this challenging environment, characterised by a large number of competitor channels. Five was the last PSB broadcaster to launch new channels, with the launch of Five Life and Five US in October 2006, and this was reflected by a small uplift in Five's overall audience share in 2007, to 6%.

Figure 2.5: Broadcaster shares in multichannel homes



Source: BARB

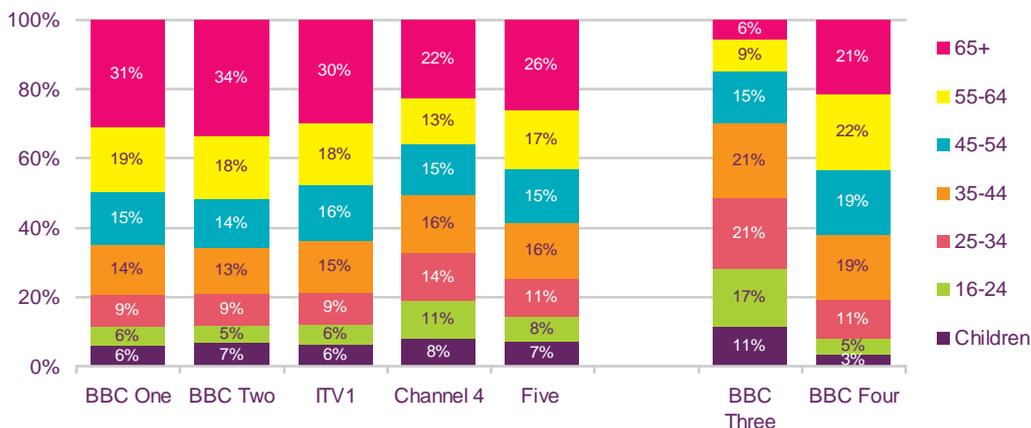
BARB audience profiles

Figure 2.6 shows the different age profiles of viewers, by channel, in 2007.

Of the five PSB channels, Channel 4 had the highest proportion of people aged under 35 (25%, excluding children) and Five also tended to have a younger viewer profile. BBC One and ITV1 had very similar age profiles, while BBC Two had the highest proportion of over-65s in its audience (34%).

BBC Three and BBC Four appeal to very different age groups. BBC Three has the highest proportion of young people of all the PSB channels – 38% (excluding children) compared to just 16% for BBC Four.

Figure 2.6: Age profile of channel viewers, 2007



Source: BARB 2007, Network
Profile data calculated on a base of all individuals 4+

Figure 2.7 shows the average hours of viewing per day of each age group since 2003, across all television channels (not just PSB channels), with an average figure for all viewers at the top. This has been included as a reminder of the differences between age groups in terms of their overall viewing of television, and how this might have changed over time.

Overall, the average time spent watching any type of television was 3.6 hours per day in 2007. 16-24s watched an average of 2.5 hours and people aged over 65 watched an

average of 5 hours. Later sections will show how the amount of viewing of different genres, e.g. news, varies considerably by age.

As Figure 2.7 shows, there has been relatively little change in the average amount of viewing since 2006, although we can see that some groups of people, e.g. children, 16-24s, 25-34s and over-65s in 2007 are viewing less than they did in 2003.

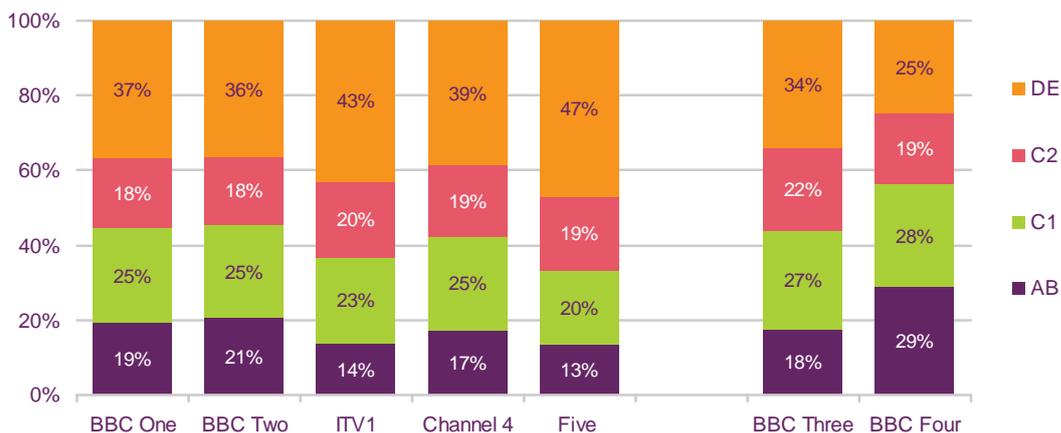
Figure 2.7: Average hours of daily viewing, 2003 – 2007,



Source: BARB 2003-2007, Network
Average hours of viewing per day, total TV

Figure 2.8 shows that in 2007, 44% of BBC One’s audience was in the ABC1 socio-economic group, compared to 37% of ITV1’s. Five had the highest proportional share of people from socio-economic group DE (47%) followed by ITV1 with 43% of its audience share. These results are consistent with 2006.

Figure 2.8: Channel profile by socio-economic group



Source: BARB 2007, Network
Profile data calculated on a base of all individuals 4+

PSB Output hours

This section outlines the relative proportions of programme output for the PSB channels. It looks first at how proportions and amounts of output have changed over time, before examining how individual channels have changed their output. It is important to note that the majority of the data in this chapter relate only to network programmes. Regional output is considered separately in the section about purpose 3.

The amount of first run originated output, and viewer perceptions of the amount of first-run UK originated programming, are analysed in more depth in Section 8, but Figure 2.9 provides useful context. It shows that the number of hours of first-run originations broadcast by the main five channels increased both in 2006 and in 2007 compared with 2005, to stand at 34,141 hours in 2007 (although it is still below the levels in 2003 and 2004).

In peak time, hours of network originations have declined a little since 2003; by less than 3% from about 109 hours a week in 2003 to 106 hours a week in 2007. Outside peak time, the volume of originated programmes fell in 2004 and again in 2005 but picked up in 2006 and 2007, largely because of the increase in late-night phone-in quiz programmes on ITV1 and Five, which were produced in-house or commissioned. The level of non-network originated programmes fell in 2005 as a result of agreed reductions in ITV1's regional quotas; this affected non-news and Current Affairs programmes.

Investment in first-run originated programming reduced in real terms by 10% from £3 billion in 2003 to £2.7 billion in 2007. Within this, non-network originations fell by 19% from £406 million in 2003 to £327 million in 2007.

Figure 2.9: Output of first-run originated programmes on the main five channels, 2003-2007



Source: Broadcaster returns

Figure 2.10 shows how the peak-time¹⁹ programme mix has changed since 2003. In peak time, the programme mix for the main five channels, taken together, shows a high degree of stability over the last five years, with the exception of factual programming, which has increased. News and Current Affairs accounted for between 14% and 15% of peak-time hours in each year, with Arts & Classical Music, Religion and Education together taking just over 3%. Programmes within the Factual genre increased as a proportion of the schedule from 25% in 2003 to 30% in 2007.

A new programme classification system was implemented in 2006 which allows this genre to be broken down into its constituent parts for 2006 and 2007: Specialist Factual; Other Factual; and Factual Entertainment, Breakdowns for the previous three years are not possible. Specialist Factual, which includes Documentaries, Natural History and Science

¹⁹ Peak time is defined as 1800 – 2230.

programmes, accounted for 16% in 2006, and 17% in 2007, of peak-time output. Other Factual, which includes Hobbies & Leisure programmes, General Factual and Factual magazines, stood at 5% and 7% in 2006 and 2007 respectively, while Factual Entertainment was stable at 5% in each of the last two years.

Feature films reduced from 11% to 8% over the same period, although this was partly due to the reclassification of TV Movies from Films to Drama in 2006.

Figure 2.10: Peak-time output 2003-2007, the main five channels



Source: Broadcaster returns

NB Arrows indicate where old genres (Entertainment, Drama incl. Soaps, and General Factual) map to new genres

The equivalent picture for the full 24 hours (Figure 2.11) also shows significant increases in the levels of Factual programmes, which grew from 16% of all broadcast hours on the main five channels in 2003 to 21% of all hours in 2007. Of this, 40% comprised Hobbies & Leisure and other General Factual programmes, including consumer magazines (such as *Watchdog*); about 30% was Specialist Factual (e.g. *Horizon*); and the remaining 30% comprised Factual entertainment programmes such as *Castaway*, *Big Brother*, *Dragon's Den* and *Wife Swap*.

Drama, including Soaps, rose slightly between 2003 and 2007, from 12% to 13% of output hours. On the other hand, a number of PSB programme genres have shown decreasing volumes over the last five years; Education is down from 6% to 4% and Children's from 12% to 10%. Later sections of this report explore these trends in more detail.

Year-on-year analysis shows that Factual and Entertainment programmes have increased their proportion of output slightly, by 1% respectively, and Sports output has decreased by the same amount.

Figure 2.11 – 24-hour output 2003 – 2007, main five channels only



Source: Broadcaster returns.

NB Arrows indicate where old genres (Entertainment, Drama incl. Soaps, and General Factual) map to new genres.

Figure 2.12 compares peak-time output across all five main PSB broadcasters for 2007.

The BBC One schedule contained the highest proportion of News (20%), with both the early and late evening news bulletins falling within peak time. Roughly half the hours in peak time consisted of News, Current Affairs, Factual and Factual Entertainment programmes. Drama and Soaps took 30% of the time available in peak time, with Entertainment, Comedy and Sports taking the remaining 22%.

No news was broadcast on BBC Two in peak time, but the channel was largely information-led, with 62% of its peak-time output consisting of Current Affairs, Factual programmes, Religion, and Arts & Classical Music²⁰. The channel showed a higher proportion of Sports in peak time (10%) a lower level of Drama (5%) than the other main PSB channels, and a slightly higher proportion of Entertainment and Comedy (20%) than the average of 17%. BBC Two was the only channel to show no Soaps in peak time.

By contrast, Drama and Soaps dominated ITV1 in peak time, occupying 47% of the time available, with entertainment taking 19%. The proportion for Factual and Factual Entertainment programmes was 7%, while Current Affairs, at 4% of peak time, was at the same level as that shown on BBC One and BBC Two.

Like BBC Two, Channel 4 showed a high proportion of information and factual programmes, with 20% of its peak-time schedule consisting of News and Current Affairs and 30% being Arts, Religion and Factual output, in addition to 13% of Factual Entertainment – the highest proportion of all the five channels. Channel 4 showed less Drama and Soaps than the average (13%) and less Entertainment and Comedy output (at 13%) than average (13%).

Five's peak-time schedule was more narrative-led, with 31% consisting of Drama (23%) and Soaps (8%) and with a higher proportion of Films (19%) than the other main PSB channels.

²⁰ Arts and Classical Music output in 2005 has been restated since the 2007 PSB Annual Report.

There was also a fairly high proportion of Factual material (25%), including series such as *Fifth Gear* and *The Gadget Show*, as well as nature and wildlife programmes.

Figure 2.12: Proportion of peak-time genre output by channel, main five channels, 2007

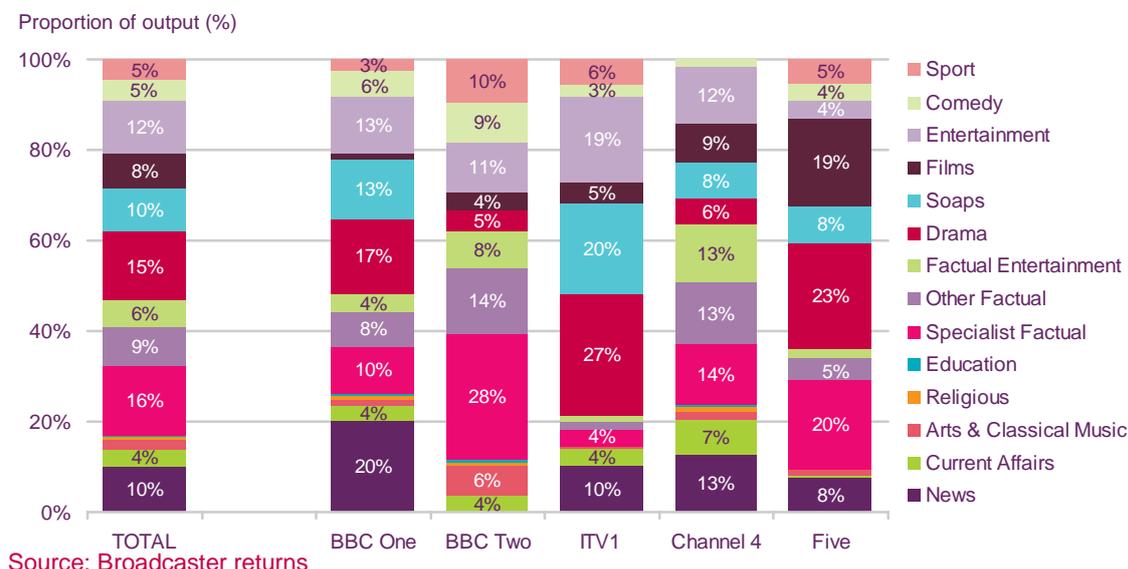


Figure 2.13 shows the programme output by the main five channels across the main part of the day from 6 am to midnight²¹.

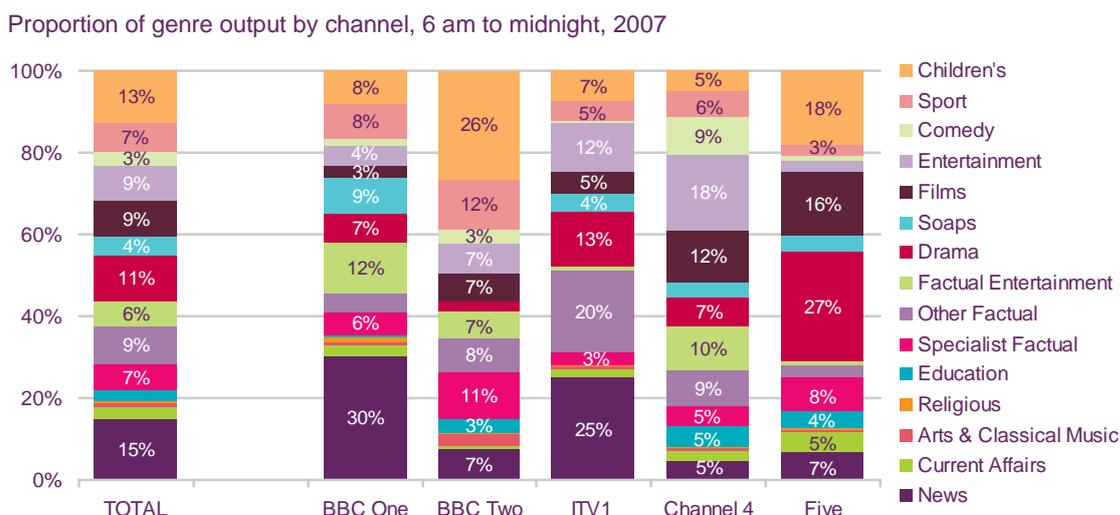
BBC One and ITV1 broadcast more News than other channels – on BBC One 30% of programmes broadcast were News and on ITV1 (including GMTV) the figure was 25%. This is primarily because the breakfast-time service on both channels consists largely of News and news-related items. The channel showing most Factual programmes was ITV1 – 20% of its output consisted of Hobbies & Leisure, Factual Magazines and General Factual programmes, as opposed to BBC Two which showed the most Specialist Factual programming (documentaries, nature & wildlife, science and history), at 11%. BBC Two also showed a higher proportion of Children’s programmes (26%) than the other main PSB channels, much of which consisted of repeats of pre-school programmes such as *Fimbles* and *Balamory* in the early morning breakfast-time slots.

On Channel 4, Entertainment and Comedy occupied 28% of the schedule - Entertainment included the afternoon game shows *Deal or No Deal* and *Countdown*, with American sitcoms such as *Friends* and *Frazier* contributing to the Comedy genre.

On Five, Drama and Soaps took up 31% of the time available. Soaps included *Home & Away* and the other Drama was almost exclusively acquired programming, such as *CSI*, *Dawson’s Creek* and *Gray’s Anatomy*.

²¹ The period 0600-2400 was chosen in order to avoid any over-representation of a genre due to a high concentration of overnight output – for example News on BBC One.

Figure 2.13: Proportion of genre output by channel, 6 am to midnight, 2007



Source: Broadcaster returns
 Note: Includes regional output

Viewing of genres

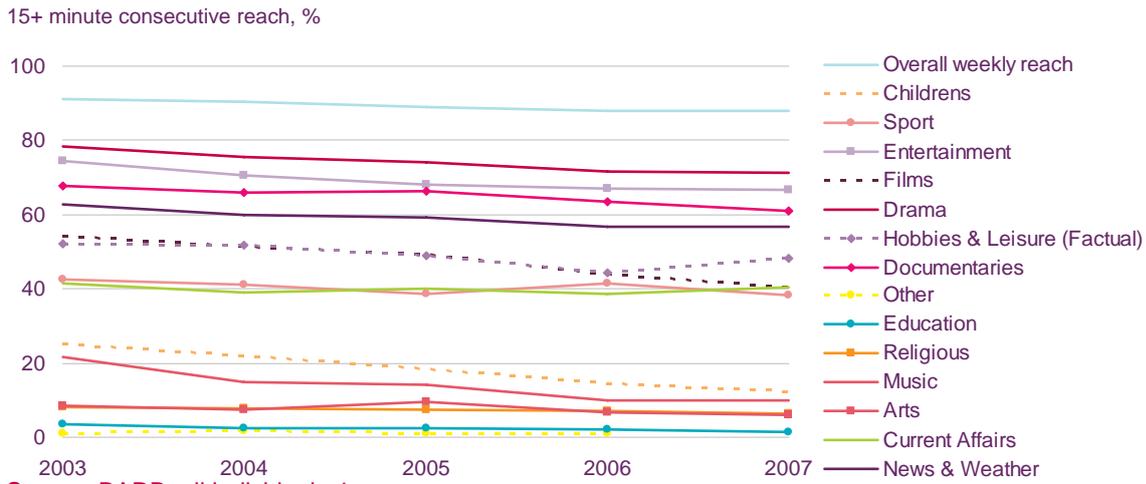
The section above describes what PSB broadcasters show on their channels, both aggregated and by channel. This next section describes the extent to which that output is watched, and by whom. First, it sets out how the proportion of viewing of different genres across the main PSB channels has changed over time. It then examines viewing habits as they relate to particular channels. Finally, it examines particular sub-groups of viewer.

Compared to 2006, weekly reach of all genres either stayed static or dropped slightly in 2007, apart from Hobbies & Leisure, and Current Affairs, which increased by 4% and 2% respectively.

Overall reach of the main five channels has, however, declined from 91% in 2003 to 88% in 2007 (Figure 2.14)²². All the individual genres on these main channels have seen some decline over this time – most noticeably for Film (54% in 2003 to 41% in 2007) Children's (25% in 2003 to 12% in 2007), and Music (22% in 2003 to 10% in 2007), areas where multichannels offer strong competition in the form of their specialist channels.

²² Reach figures set out the number of individuals aged 4+ who watched at least 15 minutes of a genre or channel in an average week.

Figure 2.14: Average weekly reach of PSB channels by genre 2003 – 2007



Proportion of viewing of programme genres

As Figure 2.15 shows, the proportion of peak-time viewing across the key genres on the main PSB channels has been fairly stable over time. The main exception is the viewing of Films, gradually falling from 8% in 2003 to 5% in 2007. Viewing of Other Factual has grown by two percentage points since 2003 to reach 19% in 2007, its 2004 level.

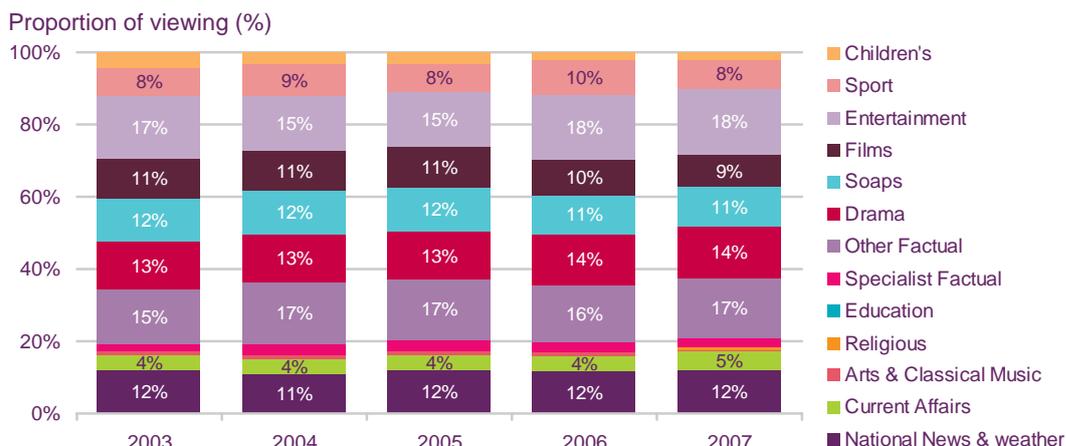
Figure 2.15: Proportion of viewing of different genres across the main PSB channels together, 2003-07, peak time, all individuals



Figure 2.16 shows the proportion of viewing of different genres on the five main PSB channels, across the whole day. The proportions of viewing across key genres was fairly stable from 2006 to 2007, although viewing of Current Affairs, Specialist and Other Factual has increased since 2003, and viewing of Children’s and Films fell.

Drama (including Soaps) continued to attract the most viewing of all genres on the main five channels in 2007, with 25% of total viewing. The Entertainment category, which includes comedy, contemporary music, games shows, and ‘event’ series such as *Strictly Come Dancing* and *The X-Factor*, had 18% of viewing and has not changed much over time. Other Factual (17%), News (12%), Films (9%) and Sports (8%) followed.

Figure 2.16: Proportion of viewing of different genres on the main PSB channels, 2003-07, 24 hours

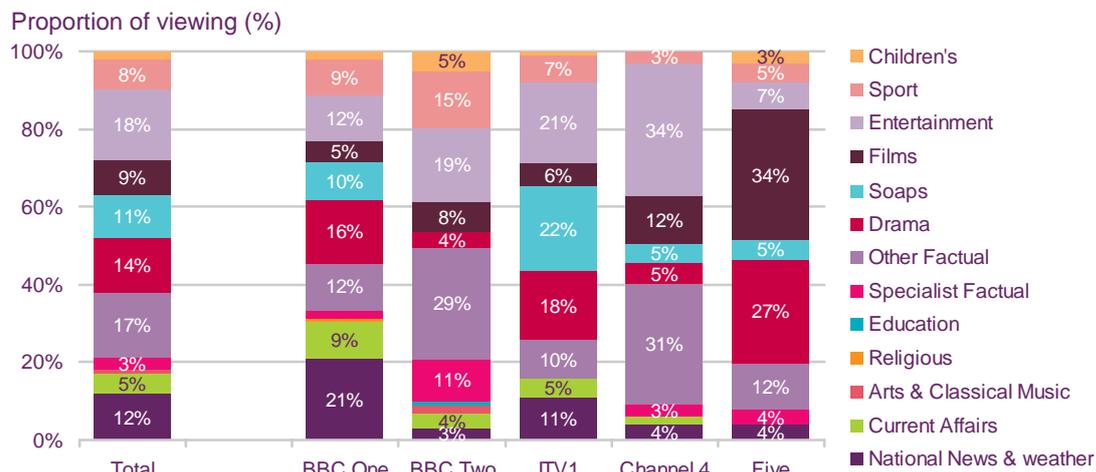


Source: BARB 2003-2007, Network, five main PSB channels only, all individuals, all time (0600-0600) (24 hours)

Figure 2.17 sets out the proportion of viewing of different genres for each of the main PSB channels in 2007 across the entire day.

In 2007, individuals across the UK spent just over one quarter of their BBC One viewing time watching Drama and Soaps, and over 20% watching national News programmes. Drama and Soaps on ITV1 accounted for 40% of its total viewing in 2007. BBC Two's leading genre was Other Factual, accounting for 29% of the share of its total viewer hours. About 65% of both Channel 4's and Five's viewing was of two genres in particular: Other Factual and Entertainment genres for Channel 4; Drama, Soaps and Films for Five.

Figure 2.17: Proportion of network viewing by channel, 24 hours, 2007

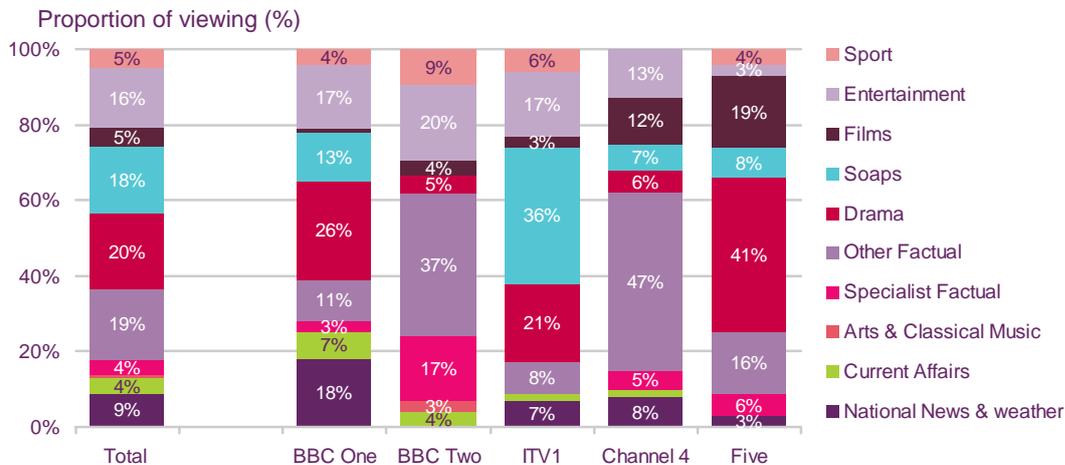


Source: BARB 2007, Network, five main PSB channels only, all individuals, peak-time (0600-0300)

Figure 2.18 shows the proportion of network viewing by channel during peak time in 2007. As with the all-day view, Drama and Soaps comprised the bulk of viewing on ITV1, in line with the channel's high amount of output in these genres. Other Factual dominated peak-time viewing on Channel 4 (47%), compared to 37% on BBC Two. However, Specialist Factual accounted for 17% of viewing on BBC Two, compared to just 5% of viewing on Channel 4. Drama (excluding Soaps) dominated viewing on Five, with 41% of viewers

compared to 26% and 21% of the viewers of BBC One and ITV1 respectively. Viewing on BBC One was the most varied between genres.

Figure 2.18: Proportion of network viewing by channel, peak time, 2007



Source: BARB 2006, Network, five main PSB channels only, all individuals, peak-time (1800-2230)

Figure 2.19 shows the proportional, or relative, amounts of viewing of different genres – as stated earlier, *overall amounts* of viewing are significantly higher for older people, and lower amounts for younger people.

The relative amounts of News, Current Affairs and Specialist Factual viewing increase with age (see Chapter 4 for more details), and the relative amount of viewing of Soaps and Entertainment decreases with age. Again, this does not mean that the overall amount of viewing of Soaps is greater among the young; rather that of their total viewing, proportionally more is spent watching Soaps than is the case for older age groups. 16-24s spend the largest segment of their viewing time (21%) on the main main five channels watching Entertainment.

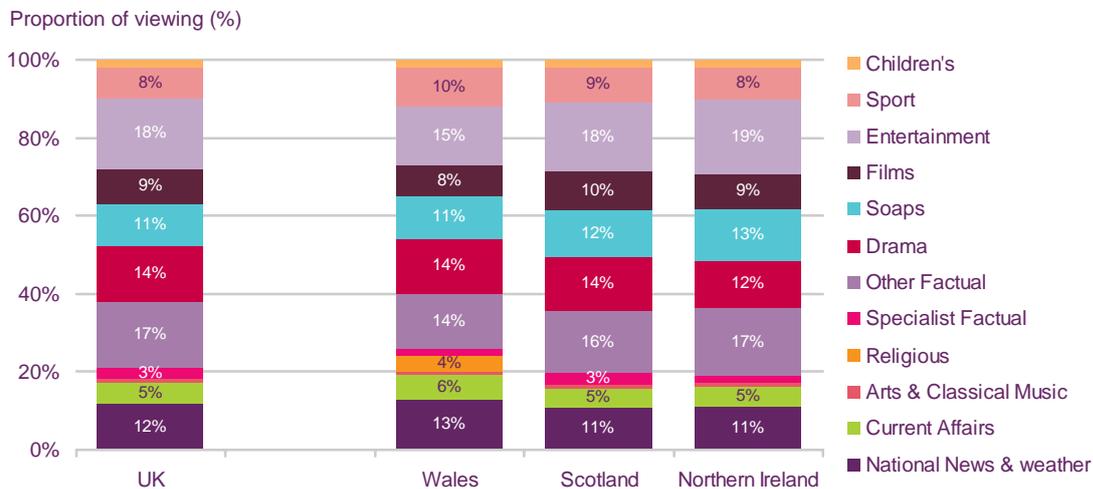
Figure 2.19: Split in total network viewing by age group (% of viewing), 2007



Source: BARB 2007, Network, five main PSB channels only, all time (0600-0300)

Figure 2.20 sets out the relative proportions of viewing of the different genres on the main five channels across the nations²³ of the UK. In 2007, people in Scotland and Northern Ireland watched a very similar mix of genres to each other, and to the UK overall. However, people in Wales watched less Films, Soaps, and Other Factual, but more News, Sports and Religious programming than those in either Northern Ireland or Scotland.

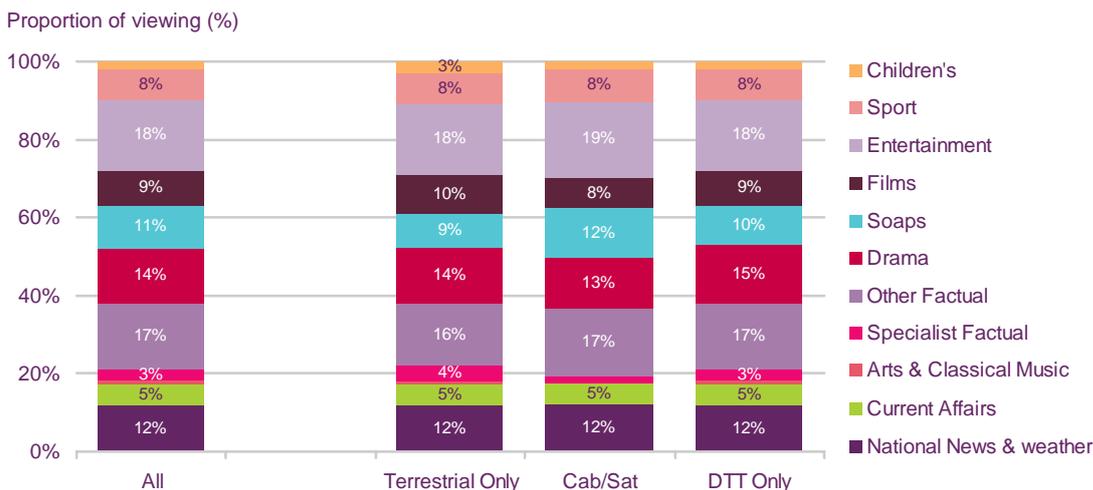
Figure 2.20: Proportion of total network viewing, by devolved nation, 2007



Source: BARB, 2007

Figure 2.21 illustrates the proportion of viewing of genres on the main five channels by terrestrial-only viewers and by those in multichannel homes. Viewing in homes with terrestrial television only and in homes with Freeview are similar in terms of the mix of genres watched. While differences are slight, there tend to be proportionally more viewing of Soaps and Entertainment and less of Films and Drama in cable and satellite, compared to Freeview, homes.

Figure 2.21: Proportion of viewing of genres on the main five channels, all individuals, by platform, 24 hours, 2007



Source: BARB, 2007

²³ England is not included here as due to its size of population there is very little difference from the overall UK breakdown.

Section 3

Overview of purposes and characteristics

Introduction

Ofcom's purposes and characteristics were put into everyday language for the PSB Tracker survey, which asked respondents to give their opinions on the PSB statements²⁴. This chapter provides an initial summary, looking at the overall importance ascribed to these elements of PSB by audiences, and their views on overall delivery, and any significant satisfaction gaps. The chapters which follow provide detailed analysis of the ways in which each of these PSB purposes and characteristics are being fulfilled by the PSB channels.

Summary findings

- Results from Ofcom's PSB Tracker show that audiences believe that public purposes and characteristics are important and are, overall, being delivered by the PSB channels together.
- Statements relating to purpose 1- *informing our understanding of the world* emerge as the most important of all, ranked highly by around 85% of viewers. Those relating to Children's programmes, News in the nations/regions and national events (all purpose 3 elements) were also ranked very highly.
- Purpose 1, about News and *gaining information about the world*, is thought to be delivered particularly well by the PSB channels together. The element of purpose 3 relating to the coverage of News and *big national events* is also seen as a strength of the PSBs.
- *Having well-made, high quality programmes, being channels viewers can trust, and having programmes people want to watch* are the characteristics that the PSB channels together are most associated with.
- However, there are areas where audiences expect more than they currently get from the PSB channels.
- When the shortfall between perceived importance and delivery is analysed, the most marked gaps between perceived importance and delivery of the purposes and characteristics relate to Children's programming (part of purpose 3), trust (*I trust this channel*), original (*It shows enough new programmes made in the UK*) and engaging (*It shows programmes I want to watch*).
- There are also significant gaps relating to PSB and the nations and regions (purpose 3); *delivery of non-News programmes in the nations and regions, portrayal of the nations to the rest of the UK* in programming, and the *provision of national/regional news programmes*.

²⁴ Viewers were asked to rate each channel on the statements using a 10-point scale, where 10 applies completely and 1 does not apply at all to the channel. Within this report a rating of 7, 8, 9 or 10 has been taken as a positive response indicating that a viewer sees the channel/channels as delivering against this purpose/characteristic.

- Other characteristics with noteworthy gaps between importance and delivery are innovation (*It shows programmes with new ideas and different approaches*), challenging (*it shows programmes that make me stop and think*) and quality (*It shows well-made, high quality programmes*).

Figure 3.1 below is a reminder of the research statements used to prompt respondents and their links to the different elements of PSB purposes and characteristics.

'Trust' has been added as a further dimension to be reported on, alongside the PSB characteristics. This was included as a question in the PSB Tracker survey, partly in relation to the issues surrounding phone votes within programmes²⁵ on the PSB channels in 2007, and also to understand people's opinions of the channels after the resolution of this issue. The overall trust people place in channels is an area of interest that may become more important in the future with the blurring between TV and other delivery platforms, and the proliferation of sources of TV content.

²⁵ 2007 saw an increasing volume of complaints about participation TV and the use of premium-rate telephone services. Concerns focused on the fairness of contests and the cost of making calls to the channels. A series of regulatory measures and intense scrutiny of the sector led to a steep decline in the number of channels and the hours of programming dedicated to quiz TV. The Ofcom-commissioned Ayre enquiry concluded that systemic problems were apparent and recommended that broadcasters' licences should be changed to contain conditions making them directly and widely accountable for their use of PRS, and to implement suitable systems of audit. Ofcom (and ICSTIS) also issued various fines to broadcasters and PRS operators. Several broadcasters announced plans to reimburse callers to unfair contests.

Figure 3.1: PSB purposes and characteristics and their alignment with PSB Tracker statements

PSB purposes and characteristics	PSB Tracker statements * Statements added to the PSB Tracker for 2007
Purposes	
Purpose 1: To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas	Its news programmes are trustworthy Its programmes help me understand what's going on in the world today
Purpose 2: To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning	It shows interesting programmes about history, sciences or the arts As a result of watching its programmes I've become more interested in particular subjects
Purpose 3: To reflect and strengthen our cultural identity through original programming at UK, national and regional level, and by occasionally bringing audiences together for shared experiences	It covers big national events well, like sports, music events or major news stories Its entertainment and factual programmes show people from different parts of the UK It shows high quality Soaps or Drama made in the UK It portrays my region well to the rest of the UK Its regional news programmes provide a wide range of good quality news about my area ²⁶ Provides a wide range of high quality and UK-made programmes for children* Aside from news, it provides a range of good-quality programmes about my Nation, made for people in my nation
Purpose 4: To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere	Its programmes show different kinds of cultures and opinions within the UK
Characteristics	
High quality – well-funded and well-produced	It shows well-made, high quality programmes
Original – new UK content rather than repeats or acquisitions	It shows enough new programmes, made in the UK
Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones	It shows programmes with new ideas and different approaches
Challenging – making viewers think	It shows programmes that make me stop and think
Engaging – remaining accessible and attractive to viewers	It shows programmes I want to watch Its programmes reflect the interests and concerns of people like me
Trust	I trust this channel*

²⁶ This also related to purpose 1.

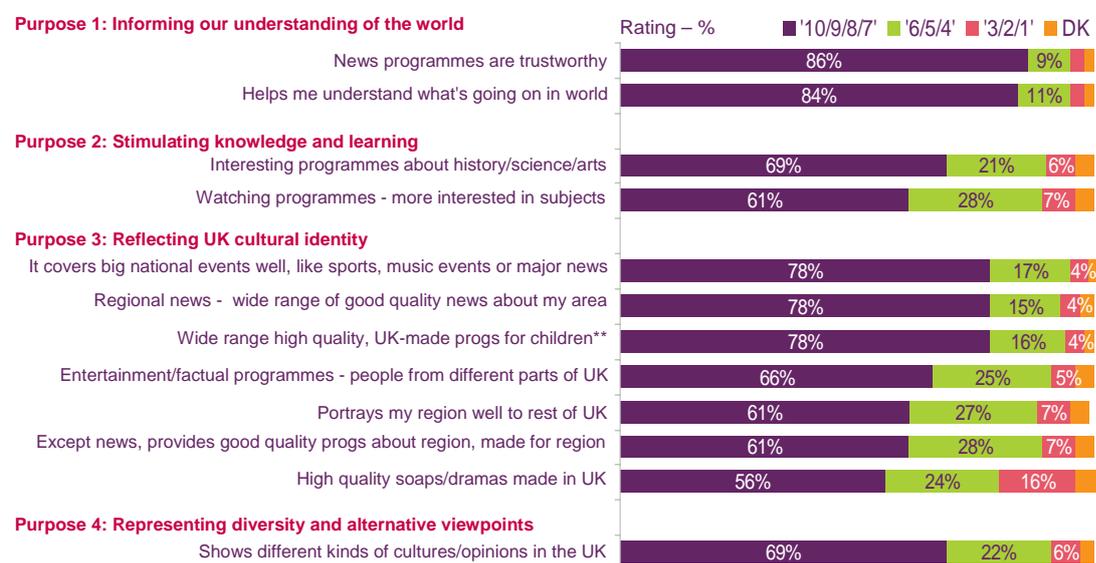
The importance of PSB purposes and characteristics

This section reports on the perceived importance of the range of PSB purposes and characteristics. Figure 3.2 shows how important people find each of the statements relative to each other.

All elements of the PSB purposes and characteristics are seen as important to the majority of viewers. Statements linked to purpose 1 continue to be seen as the most important of all. The statements ‘*News programmes are trustworthy*’ and ‘*Helps me understand what’s going on in the world*’ are rated as most important by audiences, ranked highly by around 85% of viewers.

Statements relating to Children’s programmes, national/regional News and national events were also considered to have importance for many viewers.

Figure 3.2: The importance of PSB purposes



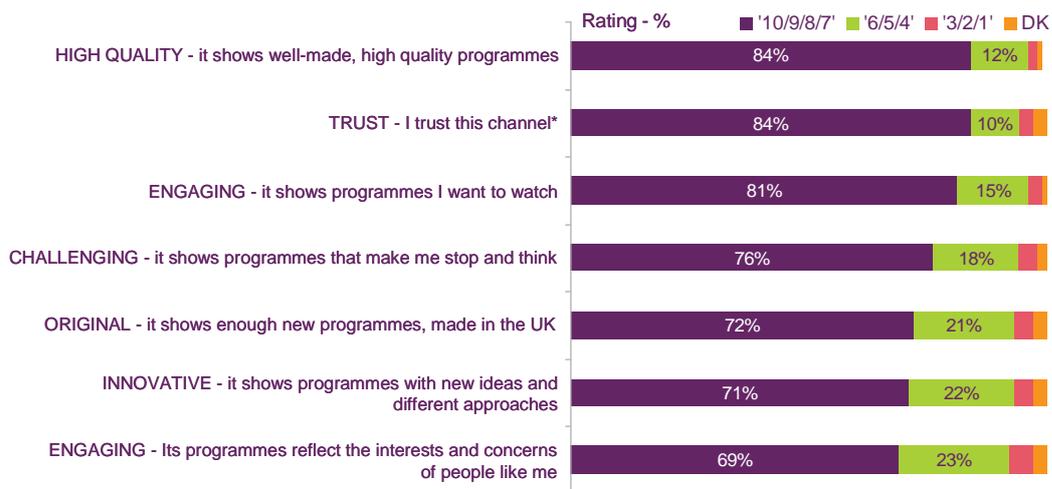
Q: And now, thinking about importance, how important do you think it is, in general, that these TV channels do this? Where 10 means "extremely important" and 1 is "not at all important."

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

Base for 'all PSB channels': All respondents = 5357;

** Base for 'all PSB channels': All respondents who are parents/carers of children in household = 703; Amalgamated data July 07, Oct 07.

Among the characteristics of public service broadcaster output, the audience rated ‘*high quality*’ and ‘*trust*’ as most important. However, all the other characteristics were also seen as important by the majority of people asked. (Figure 3.3).

Figure 3.3: The importance of PSB characteristics

Q: And now, thinking about importance, how important do you think it is, in general, that these TV channels do this? Where 10 means "extremely important" and 1 is "not at all important."

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

Base for 'all PSB channels': All respondents = 5357;

* Base for 'all PSB channels': All respondents = 913; Oct 07 data only

Overall, there was a broad consensus among people of different ages, socio-economic groups and ethnicity that each purpose and characteristic was important, although there were some noteworthy differences by sub-group, as outlined below.

Although the majority of younger people aged 16-24 agreed that each of the PSB purposes and characteristics were important (with trustworthy news and engaging content being most important), they were less likely to rate some PSB elements as important than the older age groups, specifically: *showing interesting programmes about history, science and arts*, having *trustworthy news programmes*, having programmes *that help me understand what is going on in the world*, and *showing new UK originations*. There were only a few differences among older people compared to the younger age groups; most notably, the importance of purpose 2 statement: *showing interesting programmes about history, science or arts*, and the purpose 3 statements: *portraying my region well to the rest of the UK* and *providing a range of good quality programmes about my region/nation*. Each of these increased with age.

The majority of people from ethnic minority groups thought that all of the purposes and characteristics statements were important. In particular, they were more likely than the average to think that *programmes showing different kinds of cultures and opinions from within the UK* were important, as well as *reflecting the interests and concerns of people like me*. White viewers were more likely to see the following as important: *its news programmes are trustworthy*, *its programmes help me to understand what is going on in the world*, *it shows interesting programmes about history, science and the arts*, *it shows high quality Soaps made in the UK*, *it shows well-made high quality programmes*, and *I trust the channel*.

People from AB groups were more likely than those in DE groups to think that many of the PSB elements were important, including purpose 1 elements relating to having *trustworthy News* and *understanding what is going on in the world*, *showing interesting programmes about history science and the arts*, *covering big national events well*, *showing different kinds of cultures with the UK*, *showing well-made high quality programmes*, *showing programmes with new ideas and different approaches* and *showing programmes that make the viewer stop and think*. That said, a majority of people in the DE groups also thought that all the PSB elements were important.

People from DE groups were more likely to think that regional News and non-News regional programmes were important, as well as *portrayal of their region/nation to the rest of the UK, the provision of high quality Soaps or Drama made in the UK and making the viewer more interested in subjects.*

The delivery of PSB purposes and characteristics

Figures 3.4 and 3.5 set out what viewers think of the overall delivery, by all the PSB channels taken together, of the various PSB statements.

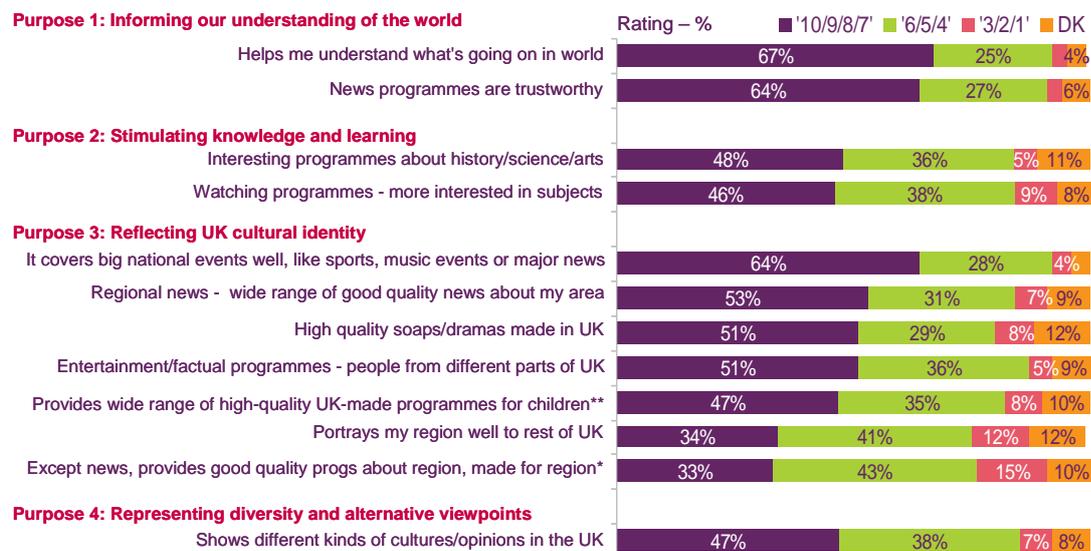
On balance, the evidence suggests that the public purposes are being delivered in most areas.

In particular, purpose 1, pertaining to news and gaining information about the world, was seen to be delivered by the PSB channels together (64% and 67% of people believed the channels delivered well on these two elements of this purpose).

The element of purpose 3 about covering news and big national events was seen to be well-delivered across the PSBs, with 64% of viewers rating delivery of these purposes positively.

Statements scoring less well related to the delivery of non-news regional programming (purpose 3), *the portrayal of my region/nation to the rest of the country* (purpose 3) and the characteristic relating to original UK content.

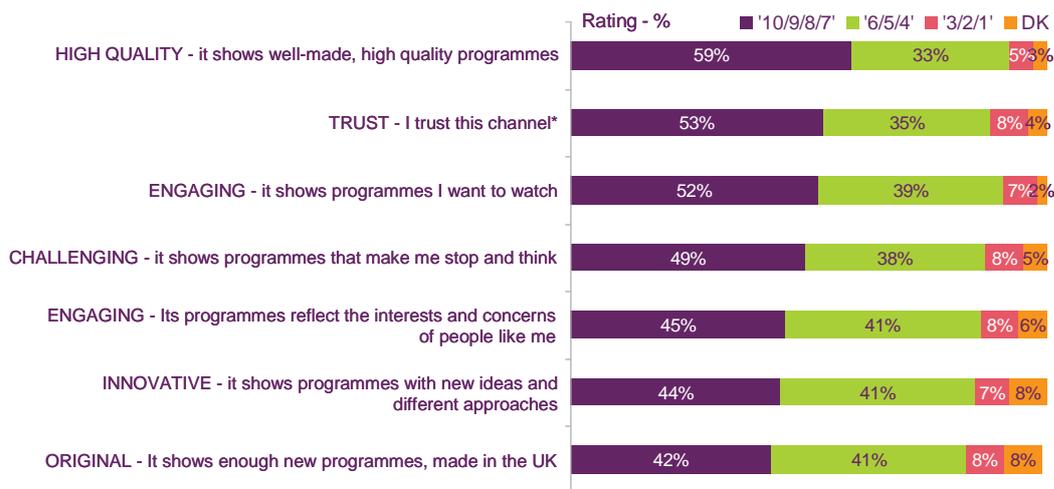
Figure 3.4: The delivery of PSB purposes



Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all'
 Amalgamated data: Jan 07, April 07, July 07, Oct 07.
 Base = All respondents. All Channels Combined = 7157;
 ** Base for 'all PSB channels': All respondents who are parents/carers of children in household = 703; Amalgamated data July 07, Oct 07.

Figure 3.5.20 shows the perceived delivery of the PSB characteristics by the PSB channels taken together. *Quality, trust and being engaging* are the characteristics that the PSB channels (taken together) are most associated with, and *having enough UK origination* is the characteristic they are least associated with. However, it is also useful to look at the perceived delivery in the context of the perceived importance of each statement (see Figure 3.6 in the next section).

Figure 3.5: The delivery of PSB characteristics



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

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

Base = All respondents. All Channels Combined = 7157;

* Base for 'all PSB channels': Trust All respondents = 1809; Oct 07 data only

Satisfaction gaps relating to PSB purposes and characteristics

Figure 3.6 shows the public's rating of the PSB purposes' importance, set against their satisfaction with the delivery of the purposes. The arrows show the 'satisfaction gap' between the importance placed on the statements, and the public's perceptions of how well they are each being delivered²⁷.

Note: The levels of perceived importance are nearly always higher than levels of perceived delivery, potentially due to the theoretical nature of the former and the actual nature of the latter. It is the *relative* size of the satisfaction gaps for the different elements of PSB purposes and characteristics that is most interesting, rather than the absolute figures.

The most marked gaps between perceived importance and delivery relate to Children's programming (part of purpose 3) and three of the characteristics; *trust*, *originality* and *being engaging*.

- *Provides a wide range of high-quality UK-made children's programmes* (-31%).
- *I trust this channel* (-31%),
- *Enough new programmes made in the UK* (-30%).
- *It shows programmes I want to watch* (-29%).

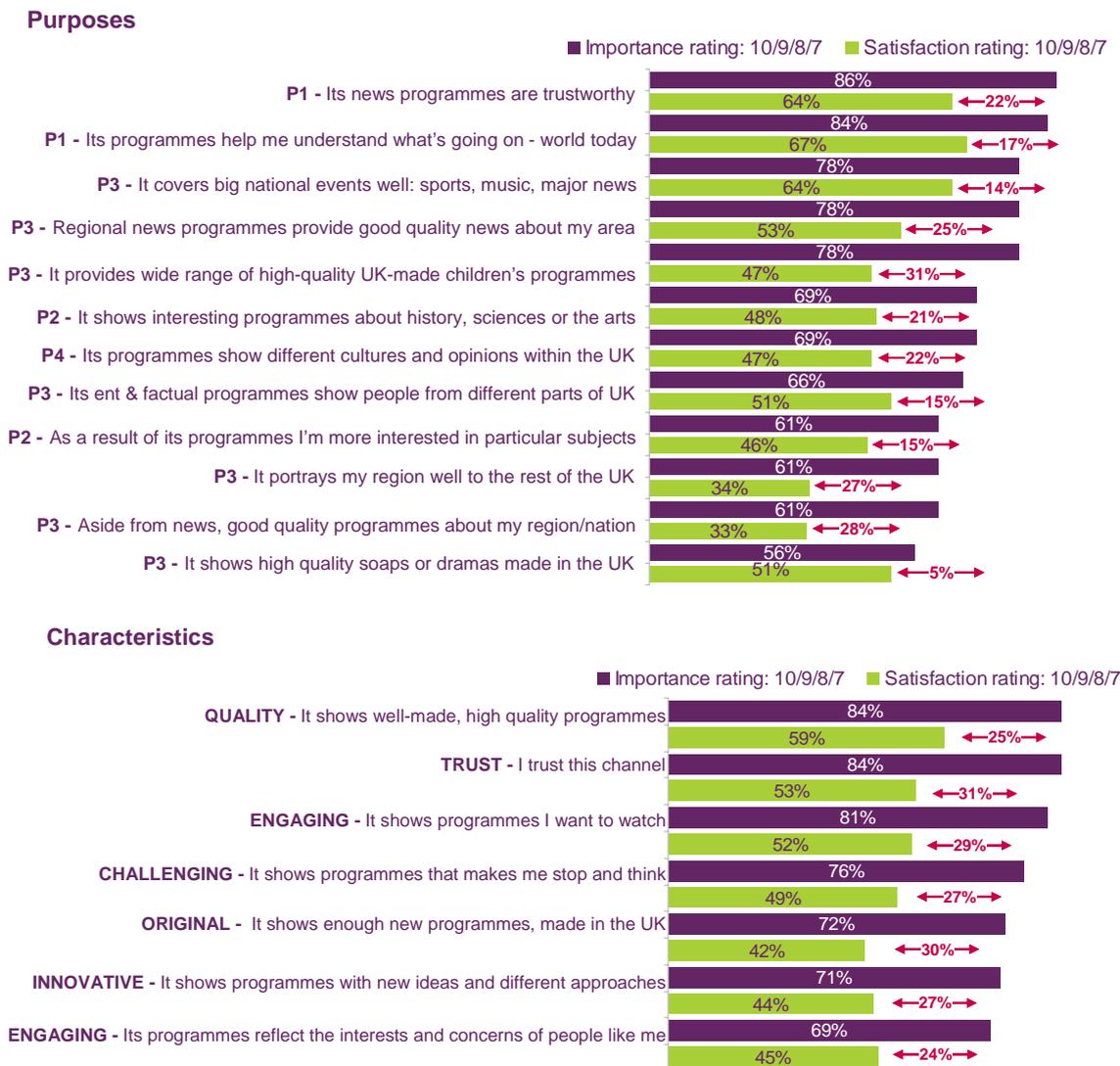
There are also issues with the perceived delivery of programming relating to the nations and regions (purpose 3), i.e. satisfaction with *delivery of non-News programmes in the nations and regions* (-28%), *portrayal of the nations to the rest of the UK in programming* (-27%) and the *provision of news in the nations/regions* (-25%).

²⁷ In the PSB Annual Report 2006 the 'satisfaction gaps' were not reported because the data on perceived importance and satisfaction came from different sources and were therefore not directly comparable. It is not therefore possible to compare the 'satisfaction gaps' in 2006 to those reported for 2007.

Other characteristics where there are notable gaps between importance and delivery include *Innovation – it shows programmes with new ideas and different approaches (-27%)*, *Challenging – it shows programmes that make me stop and think (-27%)* and *Quality – it shows well-made high quality programmes (-25%)*.

Levels of satisfaction among 16-24s are slightly higher for many of the purposes and characteristics, and levels of importance slightly lower, but overall, the gaps between the two are similar to other age groups.

Figures 3.6: Importance vs. delivery of PSB purposes and characteristics



Section 4

PSB purpose 1: *Informing our understanding of the world*

Introduction

This chapter examines the first PSB purpose, as defined in Ofcom's PSB Review 2004:

To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas

This chapter focuses on News and Current Affairs programming as the key genres delivering this PSB purpose. (Note: output in the nations is examined separately in Chapter 5)²⁸.

News programming is a genre which all main PSB broadcasters have a statutory duty to provide, and as such this purpose is directly applicable to all.

The channels that are the focus of this section are the main five channels, plus BBC Three, BBC Four and BBC News 24. It should be noted that BBC News 24 was included on the PSB Tracker from April 2007 - no data exist before this time for this channel. Please also note that BBC Parliament is not examined in this report, although it does contribute to the BBC's overall delivery of PSB content in this area.

Summary findings

Importance of purpose 1 to viewers

- News and information are still the elements of PSB television that are perceived to be of most importance to people. Over eight in ten people in the UK rate *the trustworthiness of news*, and *providing programmes that help them understand what is going on in the world* as the most important elements of PSB channel provision.

Output hours

- There had been a downward trend in volumes of News and Current Affairs programmes (taken together) in peak time since 2003, mainly because of reductions in news output on BBC Three and BBC Four. However, this remained stable between 2006 and 2007.
- There was an increase of 79 hours (or 5%) in the volume of Current Affairs programmes across the day between 2005 and 2007. Most of this increase was repeats, rather than original programming.

²⁸ Other genres, for example Specialist Factual, could also have been included here, but for the purposes of clarity of reporting they are included in the PSB purpose relating to informal learning. The emphasis in this chapter is upon the two genres which encapsulate *current* events and ideas.

Viewing

- Viewing of News programmes, in particular, is affected by news events and news output levels. Average viewing per individual on the main five channels peaked at 108 hours in 2003 (coinciding with the invasion of Iraq) but was down to 91 hours in 2007. Viewing of News accounts for 12% of all viewing on the main PSB channels.
- News on BBC One continues to receive more hours of viewing per year than News on ITV1 (56 hours and 25 hours respectively in 2007). Hours spent viewing Channel 4 news have remained constant since 2003. However, there has been a decline since 2003 for BBC Two and ITV1; down to 3 and 25 hours respectively in 2007.
- Viewing by 16-24s of network News continues to show a long-term gradual decrease, from 45 hours in 2003, to 31 hours in 2006.

Audience impact

- Over 6 in 10 viewers feel that the PSB channels as a whole provide programmes which *help them understand what's going on in the world* and which are *trustworthy* – the highest-ranked elements of PSB.
- Around three-quarters of regular viewers of BBC One and BBC Two said that programmes on these channels *helped them understand what was going on in the world*. This decreases to 69% of regular viewers of ITV1 and 59% of viewers of Channel 4.
- BBC News 24 excels in the delivery of purpose 1. Almost 90% of regular viewers of BBC News 24 said that programmes on these channels helped them *understand what was going on in the world*, and 83% saw its news content as *trustworthy*.
- Those in the DE socio-economic group are less likely to rate BBC One, BBC Two, and Channel 4 well in delivering both these PSB elements. People in Wales are more likely than those in England to say that all PSB channels and BBC programmes in particular *help them understand what's going on in the world today*. Younger viewers aged 16-24 are more likely to give Five a higher rating and BBC One a lower rating in comparison to other age groups. Those aged 55 and over are more likely to rate ITV1 higher in this area.
- Men and viewers aged 25-44 are more likely to say that Channel 4's news programmes are *trustworthy*, compared to women and older viewers.
- The Pulse survey²⁹ found that there were high levels of agreement that News broadcasting was *high quality, trustworthy* and *impartial*, and also that the viewers *learnt things* across the main five channels. Channel 4 news programming gained the largest proportion of positive responses across all these statements.

²⁹ The Pulse survey is a BBC-GfK online, nationally-representative panel of 15,000 viewers that collects responses on programmes that were viewed on the previous day. In this report, scores are presented at genre level, and by responses, not respondents.

Output

Note: BBC News 24 shows only News and Current Affairs programmes and therefore each year the total output of the genres on the channel is 8760 hours - of these 1643 hours fall in peak time. In 2007, 9% of its output was classified as Current Affairs, with the remaining 91% classified as News. BBC News 24 is not shown graphically in this section as its dedicated output would distort the picture.

News and Current Affairs output

Figure 4.1 shows that the volume of News and Current Affairs output has shown a downward trend over the last five years, from a high of 7,639 hours in 2003 (coinciding with coverage of the wars in Iraq and Afghanistan) to 6,953 hours in 2007. It should be noted that news output is likely to be somewhat reactive to major news events, as they result in extended news bulletins and additional Current Affairs coverage. The general election in 2005 also contributed to higher volumes of news and Current Affairs programmes that year.

The levels of news on BBC One and Two are also affected by the extent of broadcasting time taken by News 24 programming during the night-time on these channels (which is simulcast with the BBC News 24 channel).

Figure 4.1: Annual volume of News and Current Affairs output, all day, 2003-2007



Source: Broadcaster returns

Figure 4.2 shows volumes of News and Current Affairs programmes (taken together) during peak time. It shows a gradual downward trend (in percentage terms) over the last five years from 1,623 hours in 2003 to 1,309 hours in 2007 (a 19% fall). The reduction in output is seen mostly on channels BBC Three and BBC Four. Movements on ITV1 were caused by the changes in timing of the *News at Ten* over the years.

Figure 4.2: Volume of hours of news and Current Affairs output, peak time, 2003-2007

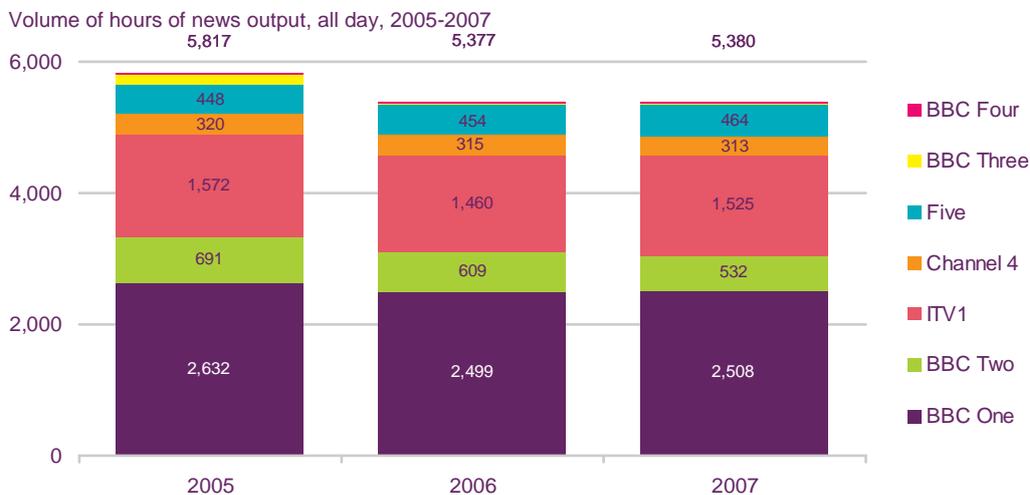


Source: Broadcaster returns

News output

Figure 4.3 shows that the volume of news across the whole day fell by about 8% from the level in 2005 (5,817 to 5,380) mainly as a result of reductions on BBC One and BBC Two in the amount of News 24 programmes shown on these channels during the night time (as well as being shown on the BBC News 24 channel itself).

Figure 4.3: Volume of hours of news, all day, 2005-2007



Source: Broadcaster returns

The volume of News in peak time has remained relatively stable on most of the main five channels over the last three years, as shown in Figure 4.4, although changes in the placing of ITV1's late evening news resulted in small increases in volume in 2006 and 2007. There was, however, a significant change in peak time News output on BBC Three from 135 hours in 2005 down to 23 hours in 2006, which was caused by *The 7 O'clock News* bulletin coming off air.

Figure 4.4: Volume of hours of news, peak time, 2005-2007

Volume of hours of news output, peak hours, 2005-2007



Source: Broadcaster returns

Current Affairs output

There was an increase of 79 hours in all-day output in Current Affairs between 2005 and 2007 (representing a 5% increase). Most of this increase was repeats, rather than original programming. On BBC One there were increases over this period from 164 hours to 210 hours, primarily as a result of a rise in repeats – these included programmes such as *Panorama* in the night-time ‘Signzone’ slots (programmes with visual signing for people with hearing impairments). On ITV1 there was a reduction between 2005 and 2007 from 233 hours to 139 hours as a result of fewer Current Affairs programmes being broadcast on Sundays (for example, *Jonathan Dimbleby* ended its run) and the disappearance of repeats of *Tonight With Trevor McDonald* in the night-time schedule. There was an increase in the volume of Current Affairs on BBC Three and a reduction on BBC Four, again mainly due to changes in the levels of repeats. Channels 4 and Five also increased their output in this area.

Figure 4.5: Volume of hours of Current Affairs, all day, 2005-2007

Volume of hours of current affairs output, all day, 2005-2007



Source: Broadcaster returns

Peak-time Current Affairs output remained stable over the last 3 years (488 hours in 2007). Within this overall total, there was very little change by channel, with only small increases on BBC One and BBC Three and small decreases on BBC Two, BBC Four, Channel 4 and Five.

Figure 4.6: Volume of hours of Current Affairs, peak time, 2005-2007

Volume of hours of current affairs output, peak hours, 2005-2007



Source: Broadcaster returns

Viewing figures

This section reports on overall hours and proportions of viewing of the News and Current Affairs genres.

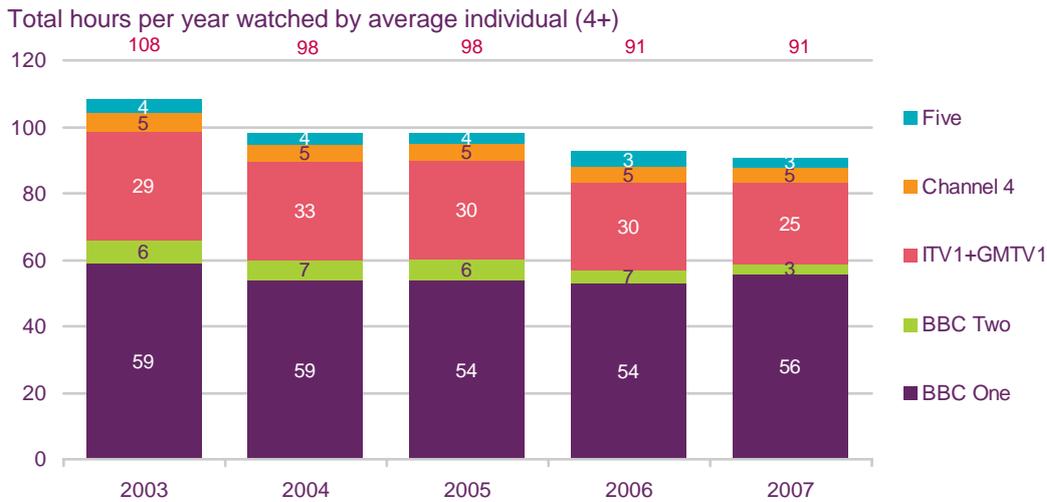
News and Current Affairs: viewing hours

Figure 4.7 shows the total hours viewed per channel. As with output, viewing of News programmes is also affected by news events and news output levels. With the invasion of

Iraq in 2003, average viewing per individual measured 108 hours. By 2007 average viewing measured 91 hours as media focus and public attention on Iraq and Afghanistan declined. Viewing of News accounts for 12% of all viewing across the main five channels.

News on BBC One continues to be viewed for more hours per year than news on ITV1 (56 hours compared to 25 hours in 2007). The level of viewing of BBC One's News has remained relatively stable over the last five years (56 hours in 2007 compared to 59 hours in 2003). However, ITV1's News viewing has fallen in the last five years from an average 29 hours per year in 2003 compared to 25 hours in 2007³⁰. Hours spent viewing Channel 4 News have remained constant for the past five years. There has been a recent decline in average hours viewed for BBC Two News from 7 hours in 2006 to 3 hours in 2007.

Figure 4.7: Total viewing of national News, all individuals, main PSB channels only



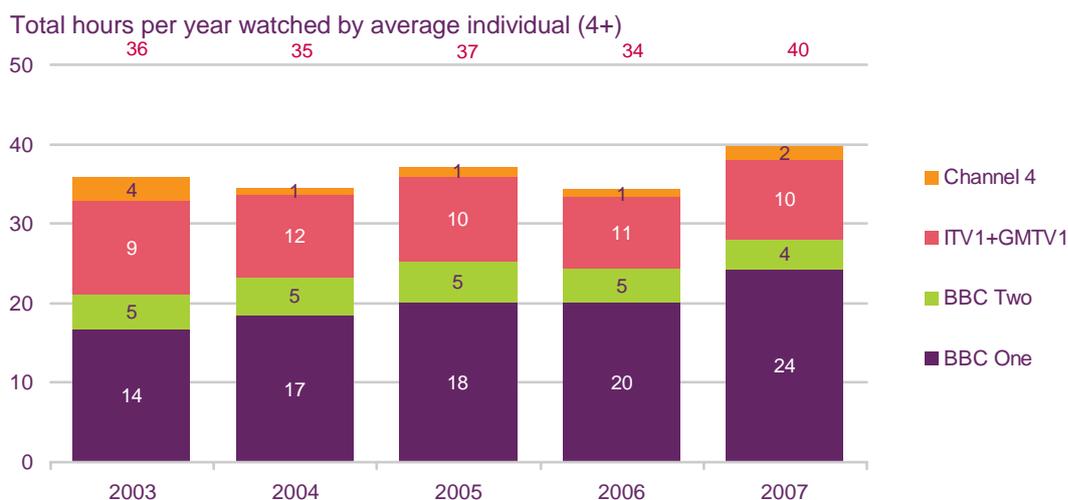
Source: BARB, 2003-2007

Figure 4.8 shows the average total hours of Current Affairs viewed on the main five channels. Viewing of this genre fluctuates over time, but it is worth noting that the 2007 figure is the highest recorded within the last five years – 40 hours compared to 36 hours in 2003.

In terms of channel movements, viewing of Current Affairs on BBC One has risen in 2007 by 6 hours since 2006 and is 10 hours higher on the five-year trend. Average viewing on Channel 4 is small but increased from 1 hour in 2006 to 2 hours in 2007. It now measures just over half of its 2003 level of 4 hours.

NB Five's *The Wright Stuff* is classified on the BARB system as Entertainment and therefore does not appear here.

Figure 4.8: Total viewing of Current Affairs, all individuals, main PSB channels only



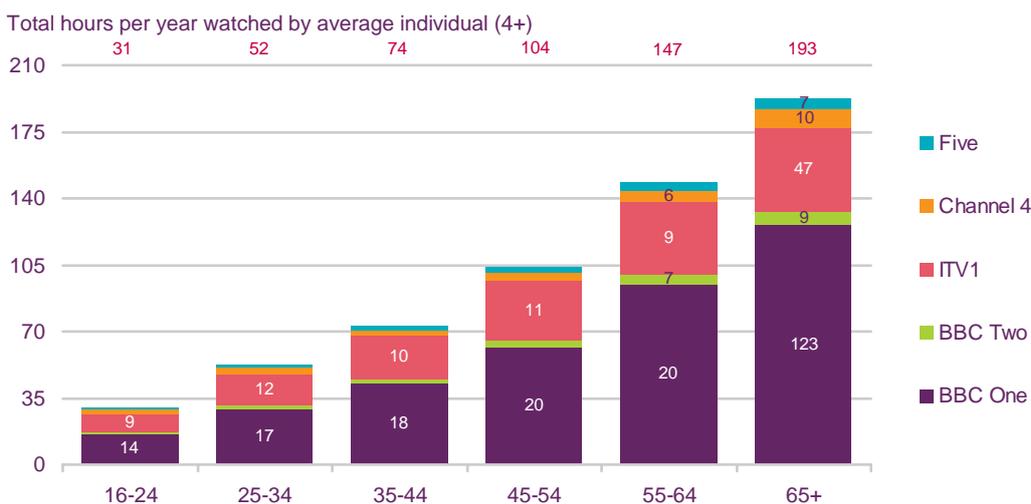
Source: BARB, 2003-2007

News viewing by age and by platform

The amount of News viewing continues to show strong correlation with the age of the viewer, as illustrated in Figure 4.9, which shows that in 2007 viewers aged 16-24 watched an average of 31 hours each year (36 minutes per week) of News programmes on the main PSB channels. This is in contrast to those aged over 65, who watched an average of 193 hours per year (3 hours 43 minutes per week) in the same time period.

The differences in the amount of viewing by age group can be partly explained by the relative amounts of television viewed overall. For example, 16-24s watch 1.5 hours less per week than those aged 65 or over.

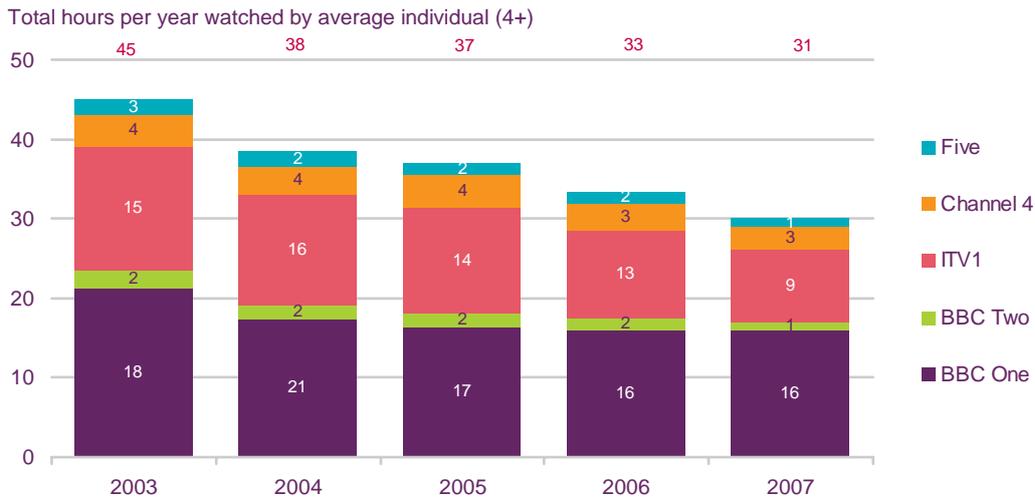
Figure 4.9: Total viewing hours of national News, main PSB channels only, by age group



Source: BARB, 2007

Figure 4.10 shows that viewing by 16-24s of network news on the main PSB channels is in long-term gradual decline (from 45 hours in 2003 to 31 hours in 2007). However, viewing of BBC One news among this age group has remained largely constant since 2004, while viewing of ITV news fell, reaching a low of 9 hours per year in 2007.

Figure 4.10: Total hours of News viewing by broadcaster, since 2003, for 16-24s

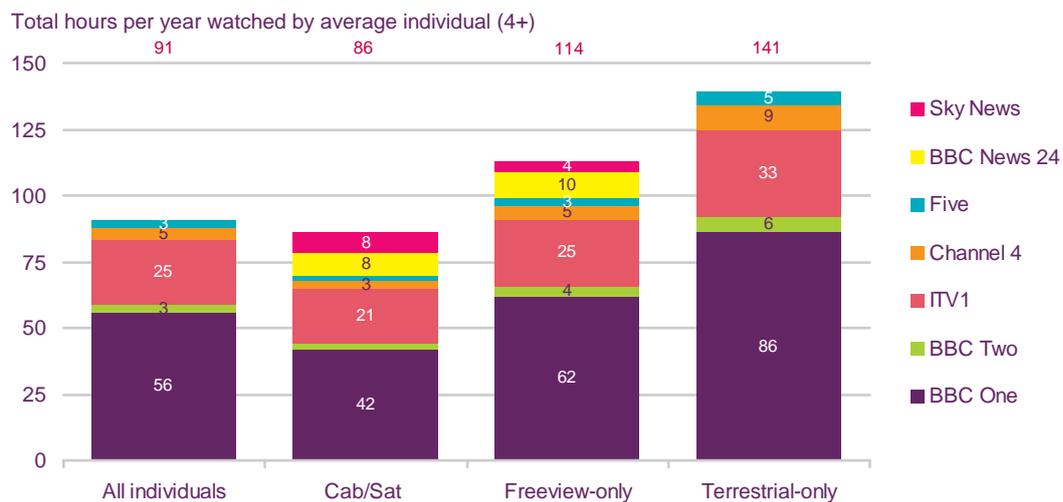


Source: BARB 2003 - 2007

Figure 4.11 shows News viewing on the PSB channels by platform. The chart clearly shows that terrestrial viewers are the heaviest consumers of television news with an average of 141 hours for those in terrestrial-only homes. Viewers in cable and satellite homes view less news than average, with 86 hours recorded in 2007. Homes with Freeview averaged 114 hours over the same period. The differences are likely to be due to a variety of reasons, including demographic profile (terrestrial viewers tend to have an older age profile and older people are heavier TV and news viewers) and the number of channels available, which affects choice and fragments viewing.

Note: The figures for cable/satellite and for Freeview include viewing of Sky News and of BBC News 24.

Figure 4.11: Split in total viewing hours of national and UK 24-hour News, by platform



Source: BARB 2007

Audience impact

This section focuses on viewers' opinions towards the channels' delivery of PSB purpose 1, which relates directly to the News and Current Affairs genres³¹.

The PSB Tracker survey asked respondents to consider two statements which, taken together, provide an indication of what audiences think of PSB broadcasters' delivery of purpose 1:

Its programmes help me understand what's going on in the world today

Its news programmes are trustworthy

Perceived importance of PSB statements

Chapter 2 of this report highlighted that the two statements above were considered to be the most important of all the PSB purposes measured in the PSB tracking survey, with around 85% of viewers considering it important that TV channels fulfil these two requirements.

In terms of demographic differences, viewers in socio-economic group AB were more likely than average to rate these statements as important. In contrast, younger viewers aged 16-24, and those viewers in socio-economic group DE, were less likely than average to rate them important.

Perceived delivery of PSB statements

When asked to rate the collective delivery of all the PSB purposes across all the PSB channels, viewers rated these two purpose 1 elements more highly than all other purposes and characteristics (67% gave a score of 7 to 10 to *Helps me understand what is going on in the world* and 64% gave the same score to *News programmes are trustworthy*). There were no significant differences in the delivery ratings at sub-group level.

In summary, purpose 1 is considered the most important of all the elements of PSB and the PSB channels are collectively seen to perform well in this area. The rest of this chapter will focus on the individual channels' performances.

Informing our understanding of the world

Figure 4.12 below shows how regular viewers of each of the PSB channels judged their experience of *gaining understanding of the world today* from watching that channel's output by rating the extent to which the following statement applied to the channel.

Its programmes help me understand what's going on in the world today

Around three-quarters of regular viewers of BBC One and BBC Two rated this statement between 7-10 out of 10. Ratings were slightly lower among regular viewers of ITV1 (69%) and Channel 4 (59%) but the majority of their viewers still rated them well on this function.

Five was rated less well, with less than half (44%) of its regular viewers associating this statement with the channel. However, Five's regular viewers do not necessarily watch the

³¹ BBC News 24 was added to the PSB tracker research in April 2007 and these data have been added to this section

channel for its News provision – demonstrated by the fact that a high proportion of its viewers say they ‘don’t know’ in response to this statement (16%).

Perhaps unsurprisingly, given the nature of the channel, BBC News 24 rated extremely well on this PSB element, with 89% of regular viewers saying that programmes on this channel *helped them understand what was going on in the world*.

Notable sub group differences were:

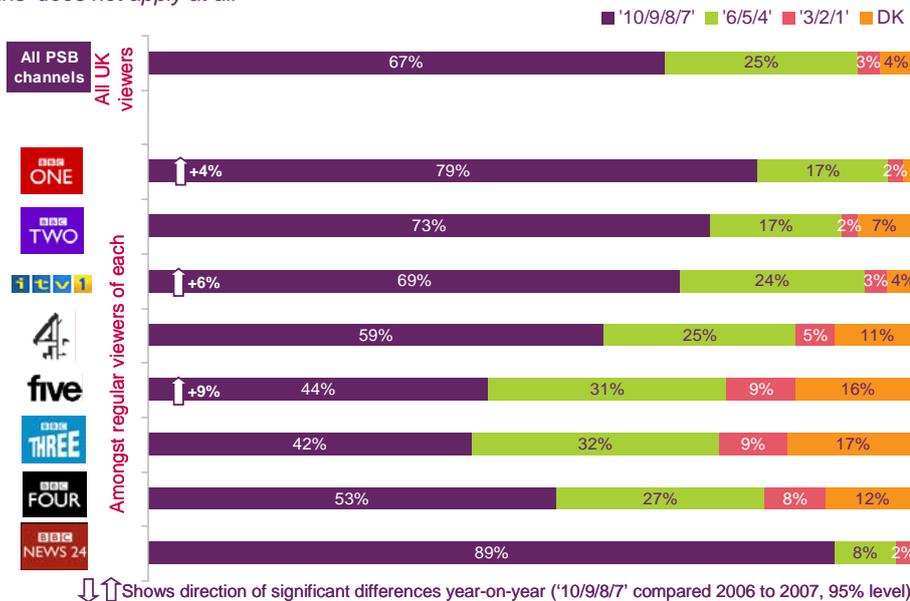
- Viewers in Wales are more likely than those in England to say that BBC programmes “helped them understand what’s going on in the world today”.
- Viewers aged 16-24 are more likely to give Five a higher rating and BBC One a lower rating, in comparison to other age groups.
- Those aged 55 upwards are more likely to rate ITV1 higher.
- People in socio-economic group AB are more likely to give BBC One a higher rating on this measure, and those in socio-economic group DE are more likely to give BBC Two, ITV1 and Channel 4 lower ratings.

Since 2006, of all the channels, Five has shown the most change in this area - up 9 percentage points on last year. BBC One and ITV also gained a more positive response in 2007 than in the previous year.

Figure 4.12: Opinions of purpose 1 – informing our understanding of the world

Its programmes help me understand what's going on in the world today

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



Base for 'all PSB channels': All respondents, 6918
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)
 BBC1 = 4906, BBC2 = 2360, ITV1 = 3669, Channel 4 = 2473, five = 1384, BBC3 = 469, BBC4 = 284, BBC News 24 = 796

News programmes are trustworthy

Figure 4.13 below shows how regular viewers of each of the PSB channels felt about the *trustworthiness* of News provision, by rating the extent to which the following statement applied to each channel's News output.

"Its news programmes are trustworthy"

It is worth remembering that of all the statements relating to PSB purposes and characteristics, this was felt to be the most important, and satisfaction levels with collective delivery are high.

Trustworthy News continues to be seen to be *well-delivered* by BBC One (75%), with significant contributions also made by BBC Two (68%) and ITV1 (69%). ITV1 now rivals BBC Two on this measure (whereas in 2006 BBC Two was slightly ahead). Channel 4 and Five rate 58% and 43% respectively with both achieving higher levels of 'don't knows' than the other main channels, suggesting some of their regular viewers are not using these channels for News. Five has improved since last year on this measure.

BBC Three and BBC Four gain similar ratings to Five (44% and 50% respectively). Again, a fair proportion of their viewers (around one in four) are unable to give an opinion, although this might reflect the fact that viewers have less experience of news content on these channels.

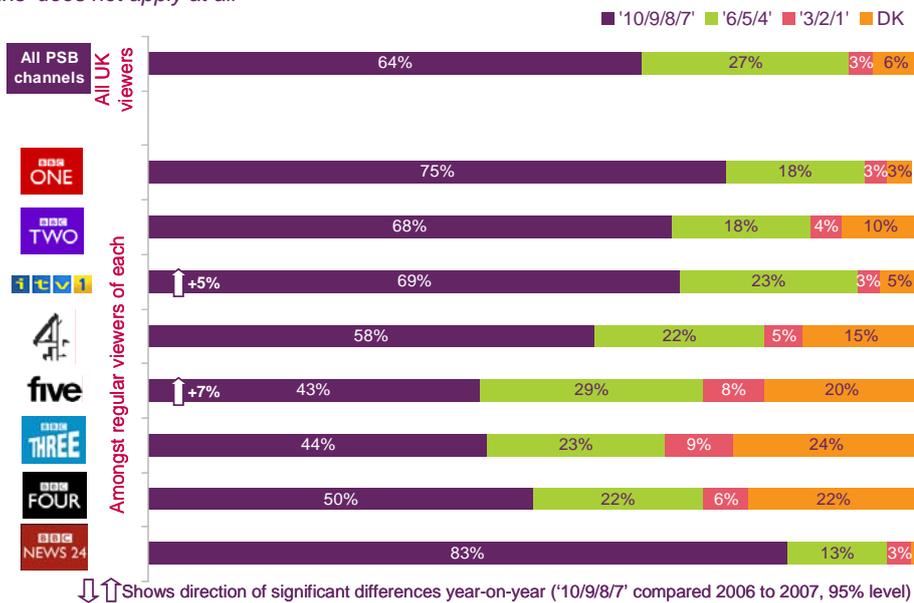
Notable sub-group differences are:

- socio-economic group DE people are less likely to rate the *trustworthiness* of BBC One, Two and Channel 4 than are people in groups AB and C1C2; and
- men (63%) and viewers aged 25-44 are more likely to say that Channel 4's news programmes are *trustworthy*, compared to women (54%) and older viewers.

Figure 4.13: Opinions of purpose 1 – news programmes are trustworthy

Its news programmes are trustworthy

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)
 BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 796

BBC News 24's delivery of purposes

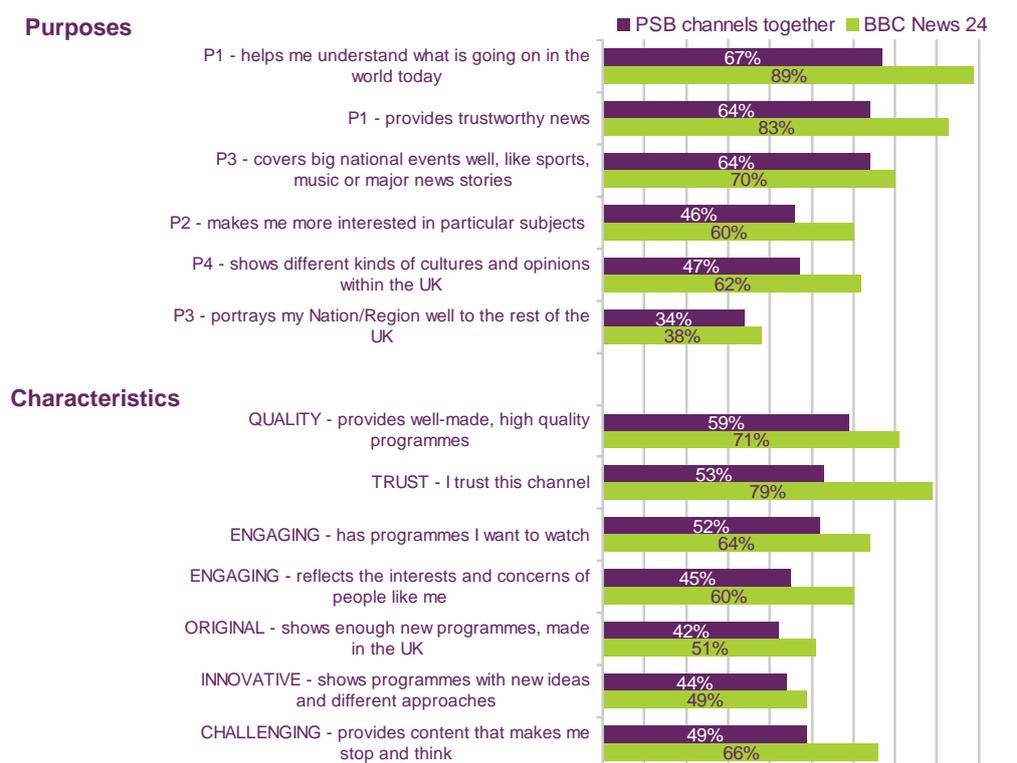
BBC News 24 is rated the highest of all the channels in the survey on 'Helps me understand what is going on in the world' (89%) and 'News programmes are trustworthy' (83%).

Figure 4.14 shows that BBC News 24 also rates well on the other PSB purposes and characteristics. Its viewers rate its output well particularly well (compared to all other channels combined) on 'showing different kinds cultures and opinions in the UK' (62%) and its ability to 'make people more interested in subjects' (60%).

Within the PSB characteristics it is strongly associated with being *trustworthy* (79%), having *high quality UK-made* programmes (71%) and being *challenging* (66%).

Note: This channel specialises in the delivery of News and therefore attracts viewers who are particularly interested in News. This is likely to underpin the strong response to BBC News 24 in comparison to the other more general PSB channels. Annex 2 shows the data for BBC News 24 in comparison with other multichannel channels that also specialise in particular genres, as this provides a more appropriate context for the data.

Figure 4.14: Perceived delivery of PSB by BBC News 24



Base for 'all PSB channels': All respondents, 6918

Base for individual channels: Self-reported regular viewers of channel (amalgamated data: Jan 07, April 07, July 07, Oct 07) BBC News 24 = 796

Assessment of Pulse survey data for purpose 1

In the BBC-GfK Pulse survey³², respondents were asked to rate a specific programme they had viewed recently on a series of statements that relate directly to PSB purpose 1:

“How trustworthy did you think this programme was?”

“How impartial did you think this programme was?”

“This was a high quality programme.”

“Did you feel you learnt anything from watching this programme?”

Responses to these programme-specific questions were then aggregated in order to provide an insight into channel delivery on these statements by genre. One viewer may therefore be giving opinions on a more than one programme as they have watched more than one programme of this type.

Both in 2006 and 2007, the proportion of respondents who gave a positive opinion on these statements for the News shown on the five main channels was very high (see Figures 4.15

³² The Pulse survey is a BBC-GfK online, nationally-representative panel of 15,000 viewers that collects responses on programmes that were viewed on the previous day.

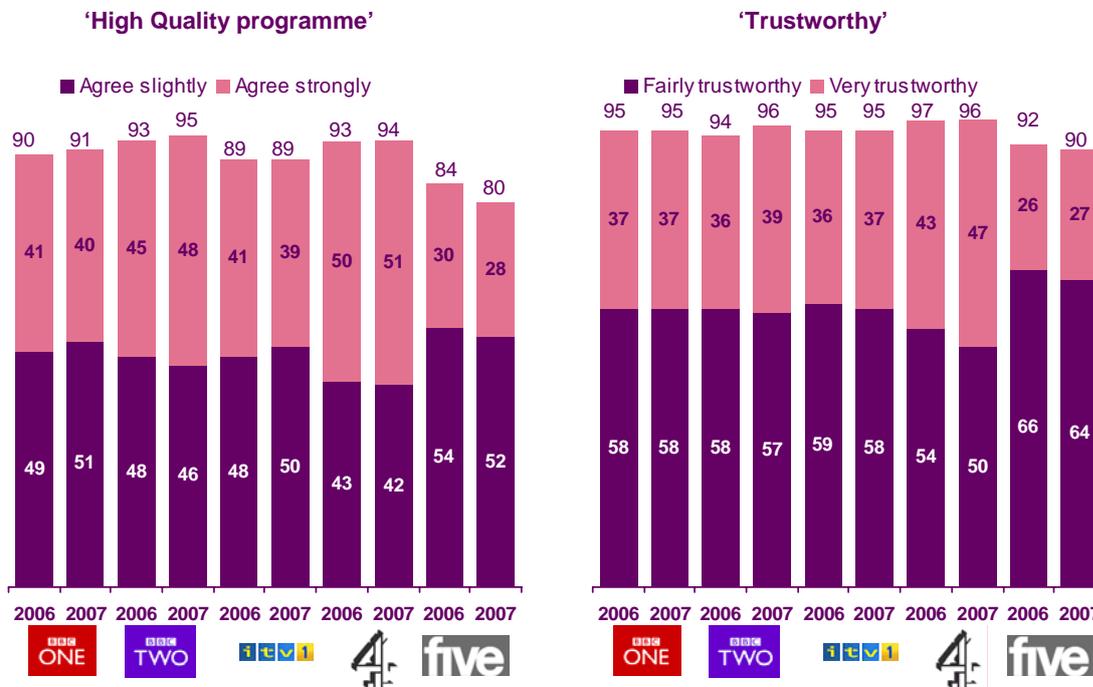
and 4.16). The Pulse data therefore confirm the positive opinions that viewers hold towards News delivery by all the major channels.

Channel 4's and BBC Two's news programmes received the highest proportions of people agreeing that they were of high quality. Five's News programmes receive the lowest scores of all the channels, although eight in ten of their News viewers agreed (strongly or slightly) that News output on Five was high quality – which is a good score overall.

Viewers' responses to the channel ratings on *trustworthy* content show a universally positive response, with over 90% agreeing that all channels' output is trustworthy. When looking at the top scores (very trustworthy), Channel 4 rates highest.

It should be noted that respondents who participated in the Pulse survey rated programmes which they had themselves chosen to watch, and so high levels of agreement with these statements may be expected.

Figure 4.15: Pulse survey opinions of purpose 1 – high quality programmes and trustworthy

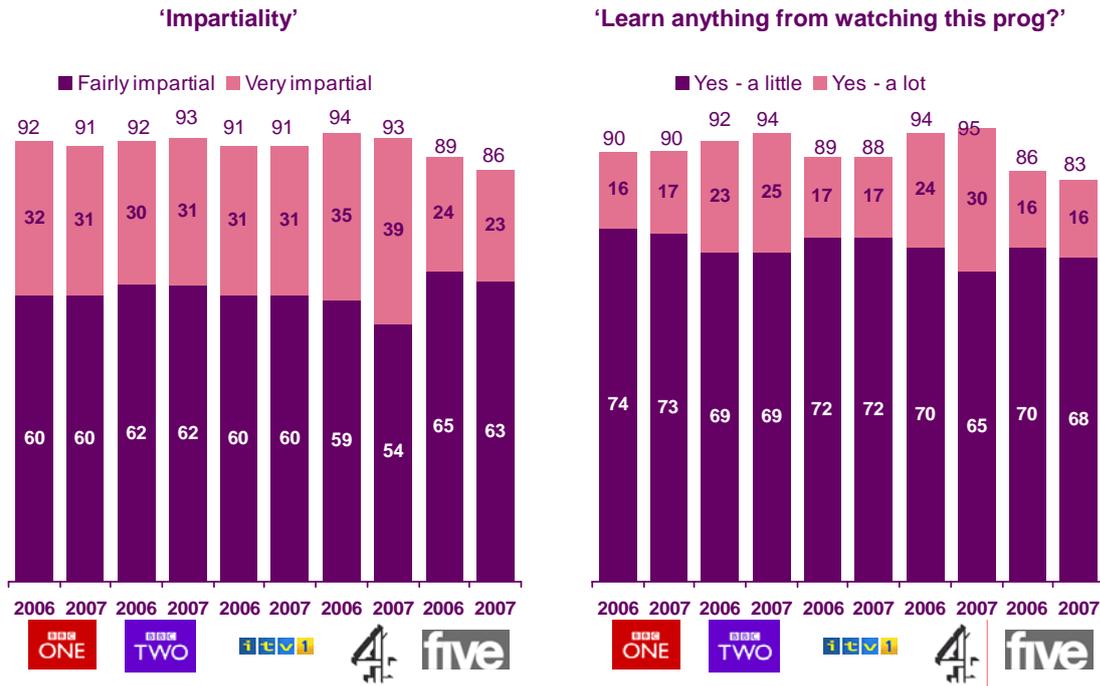


Base for all responses to programmes watched in News genre as defined by BDS
 Response figures: BBC One 386597, BBC Two 151110, ITV1 140044, Channel 4 16538, Five 7480. 2007, BBC One 226692, BBC Two 8752, ITV1 84838, Channel 4 11331, Five 3461
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006, Jan-Dec 2007

Viewers of news programmes were also asked as part of the Pulse survey whether they thought the News programmes they had watched were impartial. Levels of perceived *impartiality* were high, with over nine in ten responses to programmes on each channel being either very, or fairly, impartial (eight in ten in the case of Five). Perceived *impartiality* of News on each of the channels remained stable from 2006 to 2007.

High scores were also received for all channels on learning. Channel 4 in particular confirmed its strength in *giving people new knowledge*, with 30% of viewers saying in 2007 that *they had learnt something from it* (an increase of 6% from 2006).

Figure 4.16: Pulse survey opinions of purpose 1 – *impartiality and learning*



Base for all responses to programmes watched in News genre as defined by BDS
 Response figures: BBC One 386597, BBC Two 151110, ITV1 140044, Channel 4 16538, Five 7480. 2007, BBC One 226692, BBC Two 8752, ITV1 84838, Channel 4 11331, Five 3461
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006, Jan-Dec 2007

Section 5

PSB purpose 2: *Stimulating knowledge and learning*

Introduction

This chapter examines in detail PSB purpose 2, which focuses on informal learning across a range of programming. Purpose 2 is defined as:

To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning

This PSB purpose specifically relates to encouraging interest and learning through the genres of arts and science. Broadcasters may also consider that other types of programmes play a part in the delivery of this purpose. However, for practical purposes, throughout this section the most relevant genres are taken to be Factual (broken down into Specialist Factual, Factual Entertainment and Other Factual), Arts, Music, Education and Religious programming (previously aligned to purpose 4).

PSB broadcasters do not have any specific quotas to achieve in relation to purpose 2, although the BBC has stated that it is keen to encourage such informal learning across its programmes. In addition, Channel 4 has a remit requirement to contribute to educational and educative programming.

The channels that are the focus of this section are the main five channels, plus BBC Three and BBC Four.

The two statements from the PSB Tracker that relate to PSB purpose 2 are:

It shows interesting programmes about history, science or the arts

As a result of watching its programmes I've become more interested in particular subjects

The statement from the BBC-GfK Pulse survey that is reported in relation to PSB purpose 2 is:

Did you feel you learnt anything from watching this programme?

Summary findings

Importance of purpose 2 to viewers

- Purpose 2 is considered to be an important component of PSB, with around two-thirds of the UK population saying that *showing interesting programmes about history, science or the arts* is important. A similar proportion said that they believe it is important that they *become more interested in particular subjects as a result of watching programmes*.
- However, while purpose 2 is considered important, it falls below the importance ratings of purpose 1 *informing our understanding of the world* and some elements of purpose 3 *reflecting UK cultural identity*.

Output hours

- The growth in Factual output on the PSB channels seen in recent years continued in 2007, from 10,570 in 2006 to 11,162 hours. Increases in output in the last year were driven by more Factual programmes outside the Specialist Factual type, on all PSB channels except BBC Four. Examples of this 'Other Factual' genre include *Loose Women* and *This Morning*.
- 2006 saw a decrease in the amount of first-run peak-time originated Specialist Factual (e.g. *Horizon*). This increased slightly in 2007 to 940 hours (due to more output on Five), but not to the 2005 level (1,018 hours).
- Although the total amount of Arts and Classical Music output remained stable from 2006 to 2007, the 2007 level of 1,515 hours was still lower than in 2003 (1,931 hours).
- Hours of 'Formal' Education programmes fell by 36% between 2003 and 2007, to 1,898 hours, due to fewer repeats of programmes for schools on BBC Two and CBBC (these having been replaced by children's programmes) and a change in the volume broadcast under the BBC's Learning Zone.
- The volume of Religious programming in all hours has steadily diminished over the last five years from 390 hours in 2003 to 293 hours in 2007. Religious output increased on BBC One from 87 hours in 2003 to 105 hours in 2007, was largely maintained on Channel 4 but reduced on other channels, most significantly on ITV1.

Viewing figures

- Viewing of Specialist Factual fell back to from 27 hours in 2006 to 22 hours in 2007. In particular, viewing on BBC One fell from 9 hours in 2006 to 5 in 2007. Viewing on ITV1 also fell substantially from 2 hours to 0.3 in 2007.
- Viewing of Other Factual programming in 2007 was slightly above the 2006 level at 127 hours per year per individual. However, this remains considerably below the 2005 level of 149 hours. Channel 4 remains the most-watched channel for this genre, with 34 hours in 2007.
- Levels of viewing of Arts, Music, Education and Religious programming are low. Arts programming was watched for an average of 3 hours per individual in 2007, continuing to fall from a high of 4.6 hours in 2005. Two-thirds of this of viewing was on BBC One and BBC Two. In contrast, there was a rise in hours viewed of Music programming, up from 5.7 hours in 2006 to 6.3 hours in 2007, driven by a doubling of viewing on BBC One.
- Education programming was watched for an average of 1.1 hours per individual in 2007, down by a full hour since 2006. Viewing on BBC Two, the main provider of educational programming, has halved in one year from 1.6 to 0.8 hours in 2007.
- There has been a gradual decline in viewing of Religious programmes since 2003, with the level reaching an average of 3 hours in 2007. The majority of this viewing was on BBC One.

Audience impact

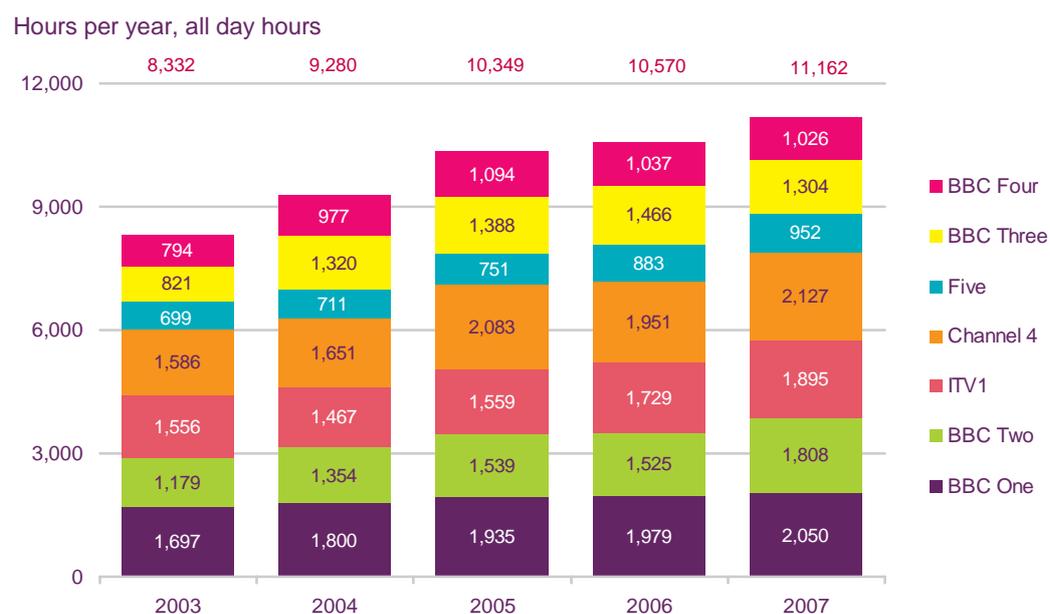
- Looking at the PSB channels taken together, just under half of all viewers rated them positively in delivering interesting programmes about history, science and the arts. This compares to nearly 70% of viewers who rated the corresponding statement as important.
- Three-quarters of regular viewers of BBC Two see it as delivering against this statement. BBC One, BBC Four and Channel 4 are also more likely than the other channels to be associated with programmes of this type by their regular viewers.
- Across all the PSB channels, taken together, just under half of all viewers rated them positively in helping to stimulate their interest in particular subjects. This compares to 69% of viewers who rated this statement as important.
- Looking at individual channels, BBC One and BBC Two are more highly rated by their regular viewers than the other channels, with over half rating BBC Two and BBC One well on this.
- The Pulse survey indicated that BBC Two programmes are especially thought to give viewers new knowledge, through both Specialist and Other Factual genres. In 2007, BBC Two gained even more strength in this area for Specialist Factual; it now gets a more positive response on this than BBC One. More viewers of Five's Specialist Factual programmes said they learnt something from its programmes, while viewers of the programmes on Channel 4 were less likely than previously to say this.

Output hours

Factual

Figure 5.1 shows a year-on-year growth in Factual programmes across all PSB channels, from 8,332 hours in 2003 to 11,162 hours in 2007 (representing a 34% growth). The Factual genre is a very broad category of programmes, encompassing Specialist Factual output such as Nature & Wildlife, History, Science & Technology and Other Documentary, as well as lighter factual material such as Magazines, Leisure & Hobbies and Factual Entertainment.

Note: In 2006 a new set of genre definitions was introduced which identifies component genres within the main Factual genre. It is not possible to re-categorise pre-2006 data and therefore we cannot compare all the component parts of the genre across the full five years under review. However, such an analysis is possible for the latest two years, as included in relevant Figures in this section.

Figure 5.1: Factual output 2003 – 2007, all day

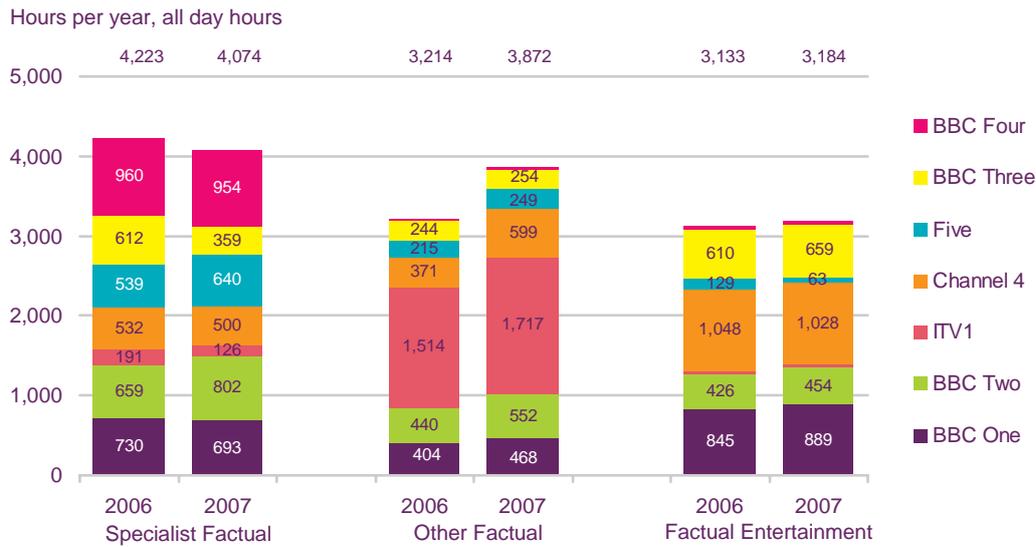
Source: Broadcaster returns

Figure 5.2 shows that Specialist Factual programmes totalled 4,074 hours in 2007, a reduction from 4,223 hours in 2006 (- 4%). Specialist Factual output across all the channels went down over this period, except for on BBC Two and Five. An increase in the volume of Nature & Wildlife programmes was the main reason for the increase in Specialist Factual programmes broadcast on these channels in 2007 – largely due to repeats. The significant reduction in BBC Three’s output from 612 hours in 2006 to 359 hours in 2007 was primarily because fewer general Documentary and Science repeats were broadcast in 2007.

Within the Specialist Factual genre, the BBC One and Two schedules contained a high proportion of Nature & Wildlife, Science & Technology and Other Documentary programmes. BBC Four showed more History, as well as Science and Documentaries on other subjects. On Channel 4, History and Science programmes featured and on Five, Nature & Wildlife and ‘other Documentaries’ featured.

On ITV1 the non-specialist Factual programmes categorised as Other Factual genre predominated – including magazine-style programmes such as *Loose Women* and *This Morning*, as well as ‘General Factual’ programmes. BBC One, BBC Three and particularly Channel 4 broadcast higher volumes of Factual Entertainment programmes than did other channels. This genre includes reality shows such as *Big Brother* (C4), *Shipwrecked* (C4) and *Castaway* (BBC One), as well as programmes like *Cash in the Attic* (BBC One), *Homes Under The Hammer* (BBC One), *The Real Hustle* (BBC Three) and *The Apprentice* (BBC Two).

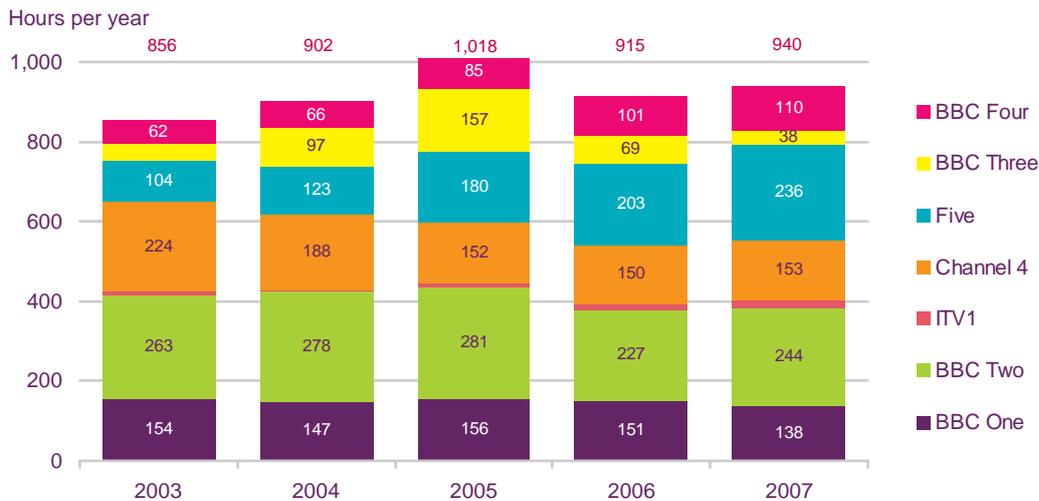
Figure 5.2: Factual output 2006 – 2007, by sub-genre



Source: Broadcaster returns

Specialist Factual programmes in the peak-time schedule increased by just over 10% - totalling 940 hours in 2007, compared with 856 hours in 2003.

Figure 5.3: First-run, peak time originated Specialist Factual output 2003 – 2007



Source: Broadcaster returns

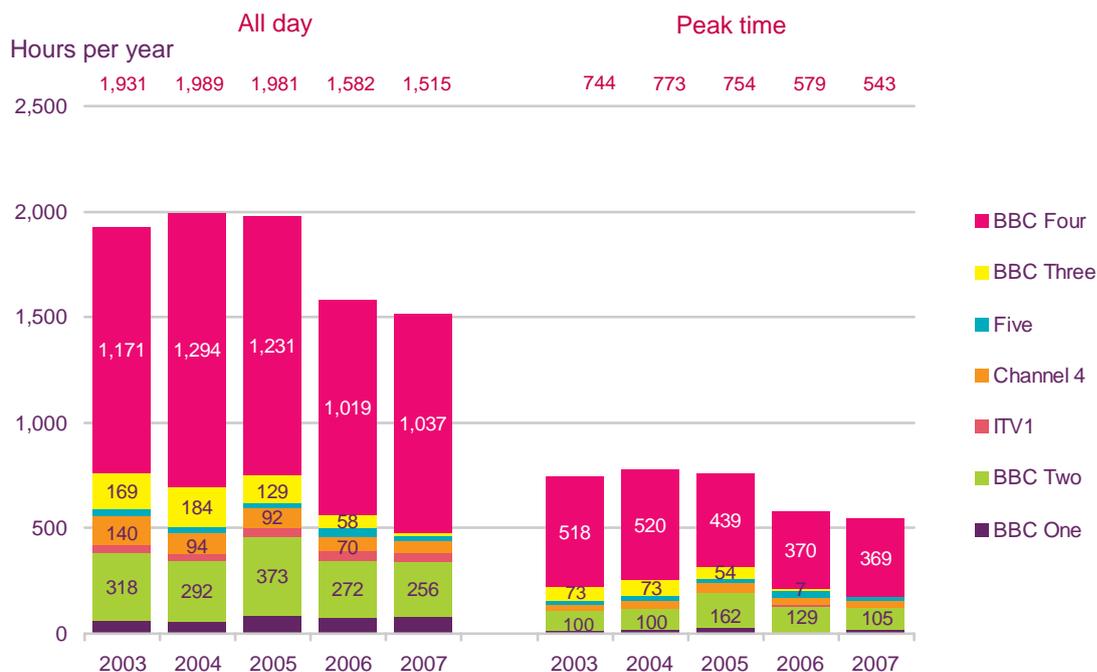
Arts and Classical Music

Figure 5.4 shows a reduction in Arts and Classical Music output since 2004 on PSB channels, taken as a whole, both for the complete 24-hour day and in peak time. Although levels of output from 2006 to 2007 remained more stable, a fall of 24% was measured between 2004 and 2007, with a reduction of 474 hours. Examples of Arts and Classical Music programmes are the *South Bank Show* and *The Culture Show*.

This reduction is mirrored in peak time, with a fall of 230 hours in output between 2004 and 2007.

Reductions occurred on BBC Two, BBC Three and Channel 4 over the 24-hour day. BBC Four remains the largest contributor in this genre in the all-day and the peak-time schedules, but its delivery has declined over time. Reductions in the number of originated hours, and more significantly in repeats (of both acquired and originated material) have contributed to the downward trend in total Arts and Classical Music programmes.

Figure 5.4: Arts & Classical Music output hours, 2003-2007



Source: Broadcaster returns

Education

Figure 5.5. shows the levels of ‘Formal’ Education programmes, including Schools programmes broadcast by Channel 4, BBC Two, CBBC and CBeebies, and the BBC’s Learning Zone output. While annual total output was reasonably consistent between 2003 and 2006, a downward shift occurred in 2007 with a reduction of 36% between 2003 and 2007 in the volume of output. This happened because fewer repeats of programmes for schools were shown on BBC Two and CBBC, having been replaced by children’s programmes. There was also a change in the volume broadcast under the BBC’s Learning Zone.

Other programmes which have an educational intention or include support materials, often through the website, are included in the following chart. Pre-school programmes are included within the Children’s genre (see Section 9).

Figure 5.5: Formal Education output hours, 2003-2007³³

Hours per year, all day hours



Source: Broadcaster returns

In addition to the Formal Education programmes, broadcasters also invest in other programmes with an educational purpose, which have support materials available to enable the viewer to pursue the subject. Figure 5.6 shows a total for all PSBs of 1,857 hours in 2007 – up from 1,363 hours in 2006 (representing a 36% increase). Programmes that encourage the audience to improve life skills and coping techniques are also included in these figures and the support materials, which are available in print, via Teletext, the web or interactively need to be clearly related to the content of the programmes. They can be taken from any genre of programmes.

³³ Formal Education programmes include schools and the BBC Learning Zone and are provided by the BBC and Channel 4. Other Education programmes from all broadcasters are included as Learning Support.

Figure 5.6: Learning support

Hours per year, all day hours



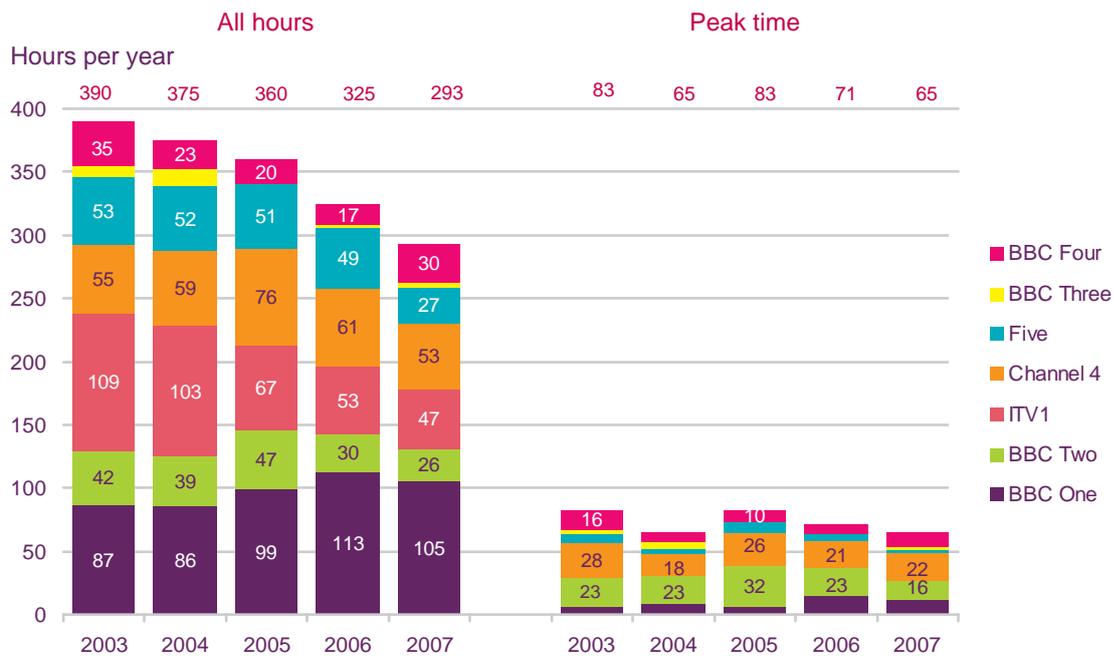
Source: Broadcaster returns

Religious programming

Figure 5.7 shows that the volume of religious programming in all hours has steadily diminished over the last five years from 390 hours in 2003 to 293 hours in 2007 (representing a fall of 25%). Examples of religious programmes are *Heaven and Earth with Gloria Hunniford* and *Songs of Praise*.

Looking at individual channels, the volume of religious programming output increased on BBC One from 87 hours in 2003 to 105 hours in 2007, was largely maintained on Channel 4 but reduced on other channels, most significantly on ITV1. With the removal of formal quotas on ITV1 in 2004, the volume fell the following year from 103 hours to 67 hours and by 2007 stood at 47 hours, representing a reduction of 57% since 2003.

Figure 5.7: Religious programming output hours, 2003 – 2007



Source: Broadcaster returns

Viewing figures

This section looks at hours viewed per average individual (aged 4+) for each of the Factual, Arts and Education genres. Factual programming has been subdivided into Specialist and Other Factual programming. The BARB categories used for Specialist Factual are those of Natural History, Science and Medical, History, and Factual Drama. Other Factual comprises Human Interest, Factual Entertainment, and the Hobbies & Leisure category.

Viewing of Other Factual programming on the main five channels remained stable year on year; 126 hours per year per individual in 2006 and 127 hours in 2007 (see Figure 5.8). However, this remains considerably below the 2004 figure of 153 hours. Channel 4 remains the most-watched channel for this genre, although BBC One and BBC Two both saw increases in their viewing in 2007.

Viewing of Specialist Factual, having risen from 19 hours in 2003 to 26 hours in 2006, fell back to 22 hours in 2007. In particular, viewing on BBC One fell from 9 hours in 2006 to 5 in 2007. Viewing on ITV1 also fell substantially from 2 hours to 0.3 over the same period. However, both BBC Two and Five bucked the overall trend, up from 11 to 11.6 hours and 1 to 2.3 hours respectively. Both of these channels had an increase in output hours of Specialist Factual in 2007, underpinning this increase in viewing.

Figure 5.8: Split in total viewing of Other and Specialist Factual (all individuals, main five PSB channels only) 2003 - 2007



Source: BARB 2003-2007

Viewing of Specialist Factual programmes appears to be correlated with age. For example, among the over-65s, Specialist Factual accounts for 3.6% of their total viewing total. This compared to 2% for 16-24s. Viewing of Specialist Factual is also greater in proportional terms in analogue homes than in cable and satellite homes.

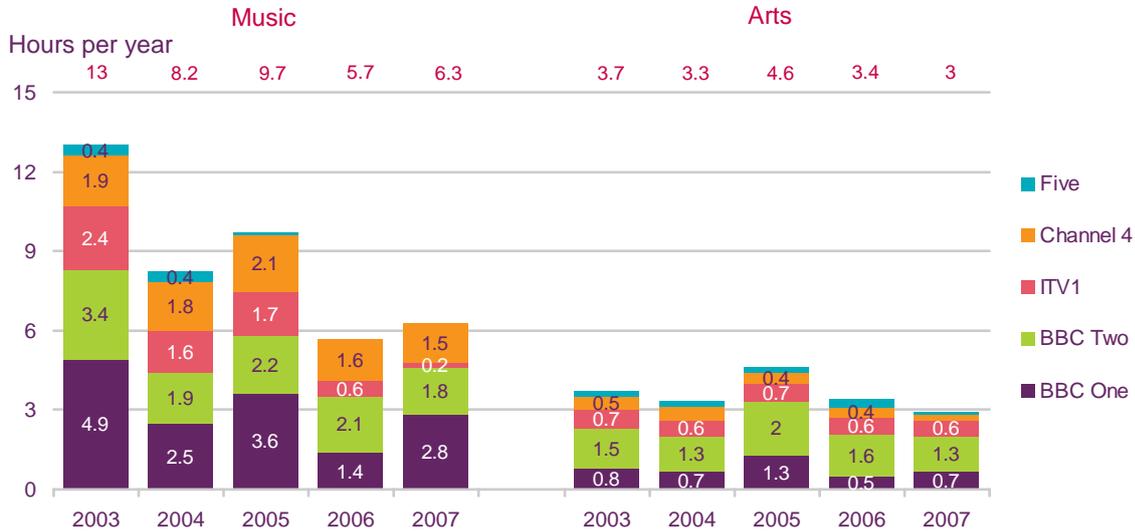
Other Factual accounts for a greater proportional share of the total viewing by 35-44s (19%) and 16-24s (18%) than for the over-65s (15%).

Arts and Music viewing hours

Arts programming was watched for an average of 3 hours per individual in 2007, continuing to fall from a high of 4.6 hours in 2005. Two-thirds of this of viewing went to BBC One and BBC Two.

In contrast, there was a rise in hours viewed of Music programming, up from 5.7 hours in 2006 to 6.3 hours in 2007, driven by a doubling of viewing on BBC One. However, this is still significantly below the 2003 level of 13 hours.

Figure 5.9: Hours of total viewing of Music and Arts (all individuals, main five PSB channels only) 2003-2007



Source: BARB 2003-2007

Education viewing hours

Education programming was watched for an average of 1.1 hours per individual in 2007, down by a full hour since last year and just over a third of the 2003 high. Viewing on BBC Two, the main provider of Educational programming has halved in one year from 1.6 to 0.8 hours in 2007. The decrease in viewing in 2007 is related to the decrease in hours of output over the period.

Figure 5.10: Hours of viewing Education (all individuals, main five PSB channels only) 2003-2007

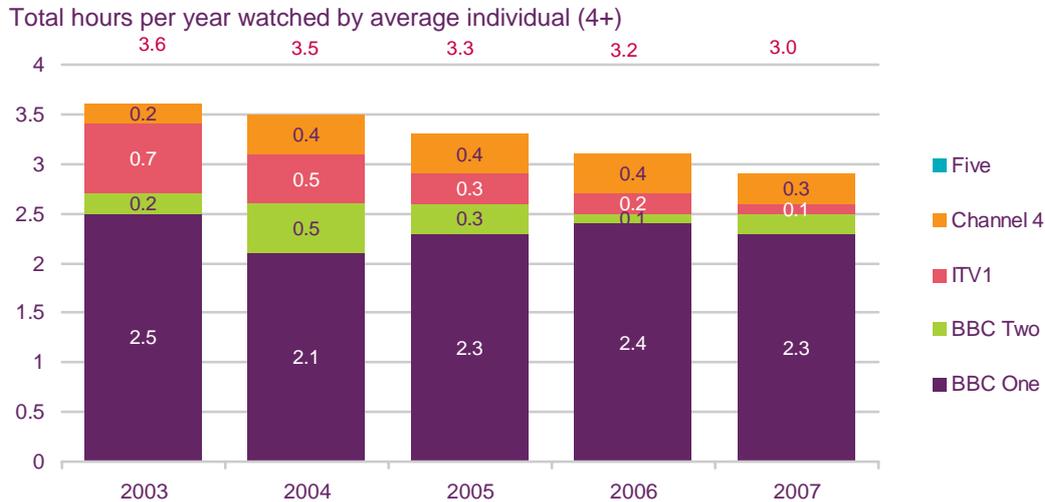


Source: BARB 2003-2007

Religious programming viewing hours

Figure 5.11 shows a gradual decline in viewing of Religious programmes since 2003. Viewers watched Religious programmes in 2007 for an average of 3 hours per year. The majority of this viewing was on BBC One.

Figure 5.11: Religious programmes annual viewing hours, 2003 - 2007



Source: BARB 2003-2007

Older people are more likely to watch these programmes, both in absolute and proportional terms.

Audience impact

This section focuses on what viewers think about the delivery of PSB purpose 2 across the channels.

The PSB Tracker asked two statements which, taken together, provide an indication of what audiences think of PSB broadcasters' delivery of purpose 2:

It shows interesting programmes about history, science or the arts

As a result of watching its programmes I've become more interested in particular subjects

Perceived importance of PSB statements

Chapter 2 of this report highlighted that purpose 2 is considered to be an important component of PSB, with around two-thirds of the UK population saying that showing interesting programmes about history, science or the arts is important. A similar proportion said they believed that it is important that they become more interested in particular subjects as a result of watching programmes.

However, while purpose 2 is considered important by the majority, scores fall below the importance ratings of purpose 1 (*informing our understanding of the world*) and some elements of purpose 3 (*reflecting UK cultural identity*). These rankings may have been influenced by lower levels of personal relevance, demonstrated by lower viewing figures, for some of the genres representing this purpose.

In terms of notable sub-group differences, younger viewers aged 16-24 are less likely than the rest of the UK, and viewers aged 55+ and those in Wales are more likely, to rate these statements as important.

Perceived delivery of PSB statements

When asked to rate the collective delivery of all the PSB purposes across all the PSB channels, viewers rated these purpose 2 elements moderately compared to the other purposes and characteristics (48% rated delivery of *'It shows interesting programmes about history, science or the arts'* as 7-10 out of 10, and 46% rated delivery of *'As a result of watching its programmes I've become more interested in particular subjects'* well.)

Viewers in Wales are more likely to say these statements are delivered well by the PSBs as a whole, while those in socio-economic group DE are more likely to say that *'As a result of watching its programmes I've become more interested in particular subjects'*.

In summary, purpose 2 is considered moderately important among all the elements of PSB and the PSB channels collectively are seen to perform reasonably well in this area.

The rest of this chapter will focus on the individual channel performances.

Shows interesting programmes about history, science or the arts

Figure 5.12 below shows how regular viewers of the PSB channels rated their delivery of *interesting programming about history, science or the arts*.

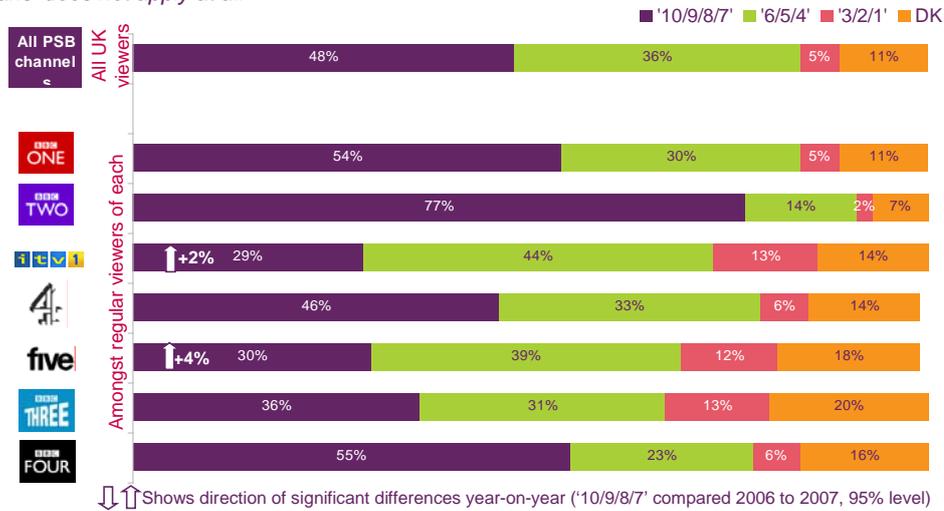
Three-quarters of regular viewers of BBC Two said it delivered against this statement – considerably more than the other channels. BBC One, BBC Four and Channel 4 are also more likely than the other channels to be associated with programmes of this type by their regular viewers. ITV1 and Five were rated more positively in 2007 than 2006, but the ranking of the channels on this element of PSB is unchanged since 2006.

Generally, viewers aged 16-44 are less likely to rate PSB channels well for delivering these programmes (with from 40% to 48% rating them 7-10 out of 10) than those aged 45+ (51-54%). Across all PSB channels, there is little difference in the ratings across socio-economic groups. However, people in socio-economic group AB were more likely to rate BBC One, BBC Two and Channel 4 positively than those in the DE group, and people in the DE group rate ITV1 more highly than those in AB and C1C2 groups. More viewers in Wales rate ITV1 well (34%) than those in England (29%), and minority ethnic groups are more likely to rate Five well (42%) than the rest of the population (29%).

Figure 5.12: Opinions on purpose 2: *interesting programmes*

It shows interesting programmes about history, science or the arts

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



Base for 'all PSB channels': All respondents, 6918

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4906, BBC2 = 2360, ITV1 = 3669, Channel 4 = 2473, five = 1384, BBC3 = 469, BBC4 = 284

Becoming more interested in particular subjects

Figure 5.13 below shows how regular viewers of the PSB channels responded to whether *they have become more interested in subjects as a result of watching programmes*.

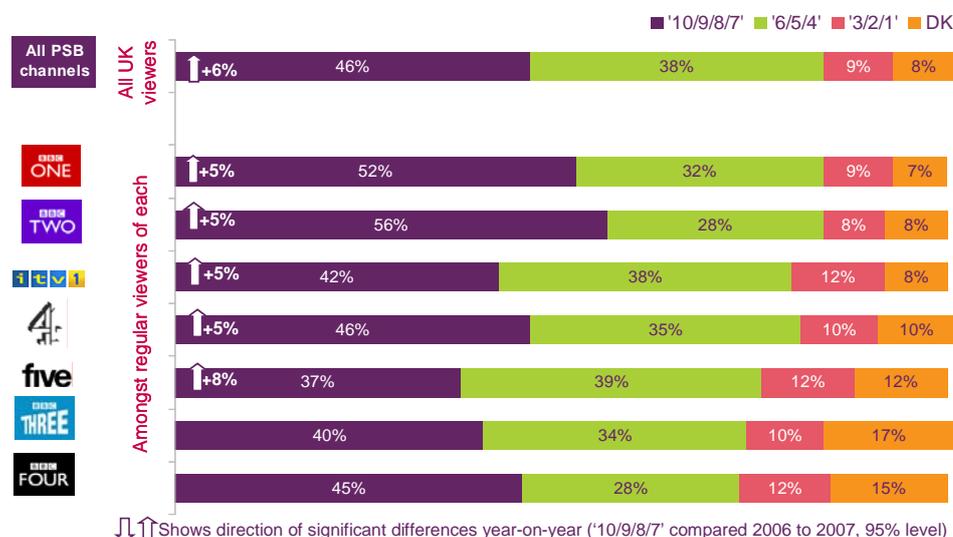
BBC One and BBC Two are more positively rated by their regular viewers than the other channels, with over half rating BBC Two and BBC One at 7-10 out of 10 on this.

Younger viewers (aged 16-24) of Channel 4 and Five are more likely than older viewers of these channels to say that they *have become more interested*. People in socio-economic group DE are more likely to rate ITV1 and BBC One positively than those in the AB group, while the reverse is true for Channel 4. People from ethnic minority groups are more likely to rate ITV1 and Five well than the rest of the population on this statement.

Figure 5.13: Opinions on purpose 2: *stimulating learning*

As a result of watching its programmes I've become more interested in particular subjects

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



Base for 'all PSB channels': All respondents, 6918
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)
 BBC1 = 4906, BBC2 = 2360, ITV1 = 3669, Channel 4 = 2473, five = 1384, BBC3 = 469, BBC4 = 284

Assessment of Pulse survey data for purpose 2

In the BBC-GFK Pulse survey, respondents were asked to rate a specific programme they had viewed recently in the Other Factual, Specialist Factual genres³⁴ or Arts and Music programmes, on a statement that relates directly to PSB purpose 2:

Did you feel you learnt anything from watching this programme?

Responses to these programme-specific questions were then aggregated by genre in order to provide an insight into channel delivery on these statements by genre³⁵.

For both Other Factual and Specialist Factual programmes there were high levels of agreement that respondents had *learnt something as a result of watching the programme*, both in 2006 and in 2007. BBC Two programmes are especially thought to give viewers new knowledge, both through Specialist Factual and Other Factual.

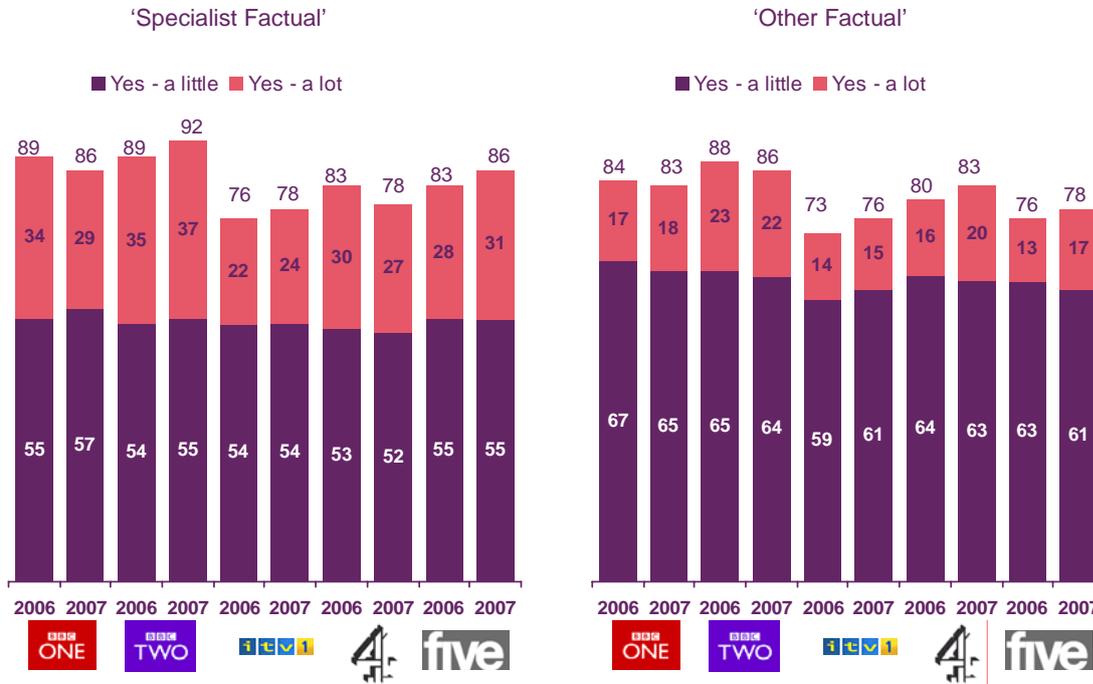
In 2007, BBC Two improved its score in this area for Specialist Factual; it now gets a more positive response on this than BBC One. In the last year more viewers of Five's Specialist

³⁴ In the Pulse survey, programmes are aggregated by genre lists in accordance with Broadcasting Data Services' (BDS) classifications. This differs from both BARB and broadcaster returns' genre classifications. Genres are not, therefore, directly comparable. The BDS Specialist Factual genre was amended by Ofcom to more closely fit the BARB and broadcaster returns' classifications.

³⁵ Respondents who participated in the Pulse survey rated programmes that they had chosen to watch, and therefore high agreement with these statements is to be expected. This is likely to underpin the strong responses, as channel viewers are more likely to be enthusiasts of the Factual output on these channels.

Factual programmes said they had learnt something from its programmes, while viewers of the programmes on Channel 4 were less likely to say this than previously.

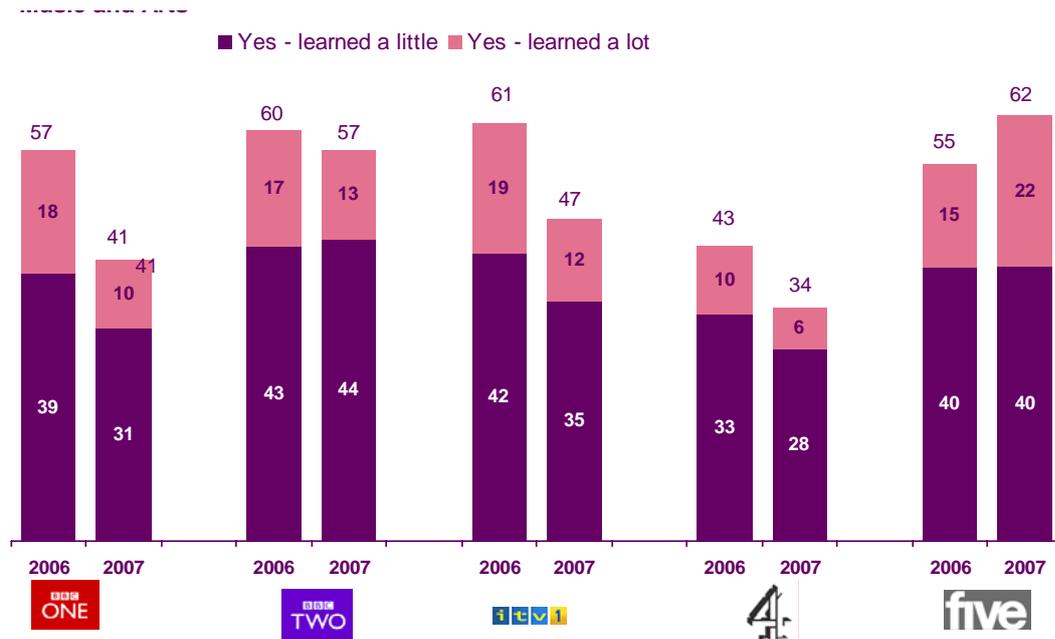
Figure 5.14: Pulse survey opinions on purpose 2: learning from Specialist Factual and Other Factual



Base for all responses to programmes watched in News genre as defined by BDS
 Response figures: BBC One 386597, BBC Two 15110, ITV1 140044, Channel 4 16538, Five 7480. 2007, BBC One 226692, BBC Two 8752, ITV1 84838, Channel 4 11331, Five 3461
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006, Jan-Dec 2007

The Pulse data show that the proportion of viewers indicating that they had learnt something from Music and Arts programmes is not stable over time. In particular, these programmes on BBC One, ITV1 and Channel 4 were not thought to promote learning by as many viewers in 2007 as in 2006. However, Music and Arts programmes do not necessarily have learning as an aim; they may instead be created with entertainment or shared experiences in mind.

Figure 5.15: Pulse survey opinions on purpose 2 – Learning, Music and Arts



Base for all responses to programmes watched in Music and Arts genre as defined by BDS
 Response figures: 2006, BBC One 4880, BBC Two 11733, ITV1 5208, Channel 4 11733, Five 4880. 2007, BBC One 5686, BBC Two 6303, ITV1 4183, Channel 4 2174, Five 130
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006, Jan-Dec 2007

Section 6

PSB purpose 3: *Reflecting UK cultural identity*

Introduction

This chapter examines the PSB purpose 3, as defined in Ofcom's PSB Review 2004:

To reflect and strengthen our cultural identity through original programming at UK, national and regional level, and by occasionally bringing audiences together for shared experiences

Purpose 3 is not necessarily aligned to any single programme genre, but rather focuses on the fostering of cultural identity at both a UK and regional/nation level, which can happen within a number of genres. This purpose is, however, particularly relevant to ITV1 because of its national and regional output.

One of the key elements within purpose 3 is that of the 'shared experience'. This encompasses both the reflection of a particular viewpoints across the UK, and also nation-wide events and issues being widely watched. In other words, it is both about the particular programme getting a wider airing, but also about mainstream content being widely shared and enjoyed. The channels that are the focus of this section are the main five channels, plus BBC Three and BBC Four.

This chapter is divided into two sections: the first examines the UK cultural identity, and the second regional/national provision.

Summary findings

Importance of purpose 3 to viewers

- Purpose 3 is a broad purpose covering shared experiences at a national and regional level and the fostering of cultural identity.
- At a UK-wide level, the coverage of big national events and the provision of good quality UK-made children's programmes were seen as important by 78% of respondents, whereas having high quality Soaps and Drama made in the UK was deemed to be the least important purpose or characteristic (56%).
- Provision of News in the nations/regions is seen as very important – 78% of respondents felt it important that regional News programmes provide a range of good quality news (this is at a similar level as the importance of news and information at a national/international level in purpose 1).
- Although fewer people see the positive portrayal of people in the nations/regions and the provision of non-News regional programmes as important than find regional News important, these elements are still seen as important by just under two-thirds overall. In particular, the positive portrayal of lives in the nations is seen as important by those in the devolved nations. Non-news programming is thought to be particularly important by those in Wales and Northern Ireland.

UK cultural identity

Audience impact

- Sixty-four per cent of viewers of the PSB channels rated them positively in their coverage of big national events, making this one of the best performing areas of PSB.
- BBC One and ITV1 are still perceived to lead the way in their coverage of big national events. Viewers aged 55+ are more likely to rate BBC Two well on this statement, and younger people are more likely to rate Channel 4 well. People from ethnic minority groups are more likely to rate Five positively than the rest of the population on this statement.
- Around half of viewers of the PSB channels also rated them well collectively in their delivery of high quality Soaps or Drama made in the UK. This is down 10 percentage points on last year – the largest fall across all statements relating to PSB purposes and characteristics.
- Looking at individual channels, BBC One and ITV1 still lead the way in provision of high quality UK Soaps and Drama. ITV1 is rated higher than any other channel by regular viewers. Regular viewers in younger age groups are much more likely to agree with this statement for BBC One and Channel 4 than those in older age groups.

Nations and regions provision

Output hours

- In 2007, in comparison to 2006, non-network output in the nations remained at similar levels on BBC and on ITV in the nations, except:
 - in Wales (a decrease on BBC);
 - in Northern Ireland (an increase on BBC); and
 - in Scotland (a small increase on BBC).
- However, in the longer term, there have been decreases in non-network/regional output across Wales, Scotland and Northern Ireland.

Viewing figures

- BBC One early evening regional News continues to attract a higher audience share than ITV1, across the UK as a whole and across every region apart from Northern Ireland (Ulster) and Border.
- However, comparing 2007 with 2003 data identifies that, apart from Northern Ireland and Meridian, the share of audiences received by BBC regional News in each of the regions and nations has declined slightly. ITV shows a more mixed picture, with around half of the regions/nations gaining an increased share in 2007 against 2003.
- Many network programmes with specific regional or national locations tend to gain higher audience shares in those particular regions or nations. In particular, *Rebus*, *Heartbeat* and *Taggart* do well in their region/nation of origin.

Audience impact

- News remains the key element of nations' and regions' provision. Across all the PSB channels taken together, 53% of viewers rated their delivery against this purpose as high. Of the nations, satisfaction levels tend to be somewhat lower in Scotland.
- Only the BBC and ITV show national/regional news programmes, and over 6 in 10 of their regular viewers rate them well in delivering quality regional news.
- Non-news regional programmes (shown on BBC One, BBC Two and ITV1) performed less well. Across these channels taken together, only 33% of viewers rated them well in this area, making this the lowest performing area, although this is also one of the elements of PSB that is seen as important by fewest viewers.
- Viewers in Northern Ireland and Wales are the most likely to say that non-news provision is important, and the gap with perceived delivery is greatest in Northern Ireland
- Around half of all viewers rated the PSB channels positively on their inclusion or coverage of people from different parts of the UK in Entertainment and Factual programmes, but only one-third of viewers rated them well in terms of giving a positive portrayal of the viewers' regions to the rest of the UK.
- The level of perceived importance of the positive portrayal of nations and regions was relatively high in the devolved nations, and gaps with delivery are significant - particularly in Northern Ireland and Scotland.

UK cultural identity

This section focuses on what viewers think about the delivery of PSB purpose 3 across the channels.

There are two statements from the PSB Tracker that together provide an indication of the extent to which viewers feel that this element of PSB purpose 3 is being carried out by the broadcasters³⁶:

It covers big national events well, like sports, music events or major news stories

It shows high quality soaps or dramas made in the UK

Perceived importance of PSB statements

Chapter 2 of this report highlighted that these elements of purpose 3 are considered to be an important component of PSB by the majority of the UK population. *Coverage of big national events*, in particular, is considered important, with 78% of the UK population rating this well (it ranks 3rd in the overall hierarchy of importance of PSB purposes). Provision of *high quality* UK Soaps and Drama was considered relatively less important, with 56% of the UK population considering provision of this genre important to PSB delivery – this was considered the least important PSB statement overall.

³⁶ The statement 'Its entertainment and factual programmes show people from different parts of the UK' was included in this section in the 2006 report, however this is now reported in the nations and regions section of this chapter.

In terms of notable sub-group differences, female viewers are significantly more likely to rate high quality Soaps and Drama *made in the UK* as important – 63% vs. 47% of men.

Perceived delivery of PSB statements

The relative score differences were consistent when people were asked to rate the collective delivery of all the PSB channels on these two PSB components. Higher scores were received for all the channels collectively for '*coverage of big national events*' (64%) than '*high quality soaps and dramas made in the UK*' (51%).

Female viewers and viewers aged 16-24 were more likely to rate the PSB channels delivery against all three statements, and viewers from socio-economic group AB were less likely.

In summary, coverage of big national events is considered an important aspect of PSB and is considered to be well delivered by the majority. Provision of high quality Soaps and Drama, whilst important for some, is considered the least important component of PSB (in relative terms). Delivery of this component by the PSBs collectively is rated well by half of the population.

The rest of this chapter will focus on the individual channels' performances.

Coverage of big national events

Figure 6.1 below shows how regular viewers of the individual PSB channels rated their coverage of big national events. It should be noted that this statement may reflect the amount and type of big national events that occur in a year, as well as the channel's coverage of these.

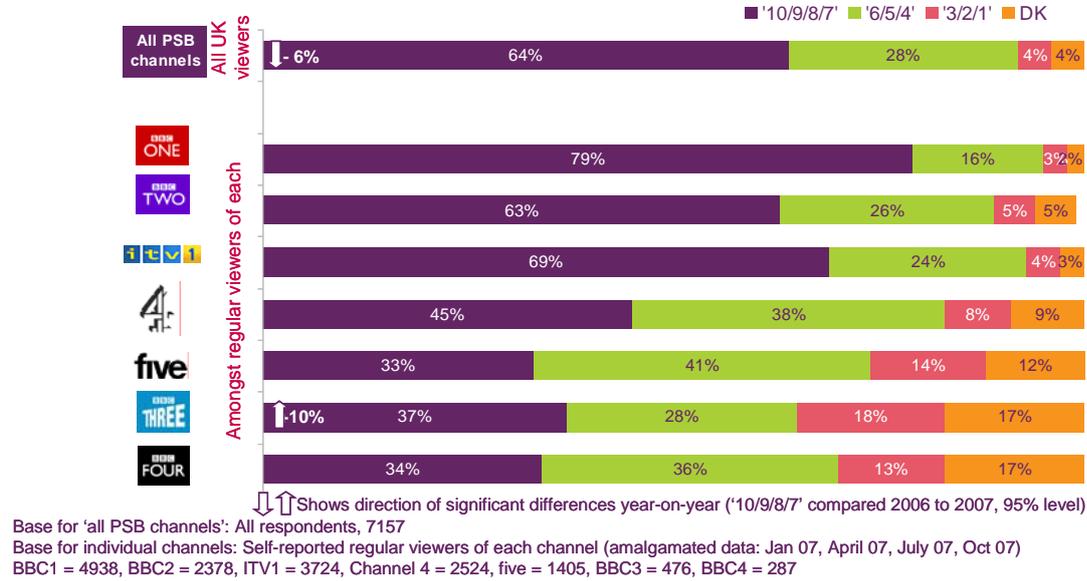
BBC One (79%) and ITV1 (69%) rated the highest on coverage of big national events. Across all the PSB channels collectively, ratings on this measure have fallen 6 percentage points since 2006, although BBC Three has shown a 10 percentage point increase among its regular viewers, to 37%.

Viewers aged 55+ are more likely than average to rate BBC Two well on this statement, and younger people are more likely than average to rate Channel 4 positively. People from ethnic minority groups are more likely than average to rate Five well on this statement.

Figure 6.1: Opinions on purpose 3 : *it covers big national events well*

It covers big, national events well, like sports, music events or major news stories

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



UK high-quality Soaps and Drama

Figure 6.2 below shows how regular viewers of the PSB channels rate their delivery of high quality Soaps or Drama made in the UK.

ITV1 is rated higher than any other channel by regular viewers for showing high quality Soaps or Drama made in the UK (66%). BBC One ranks second on this measure with six in ten of its regular viewers rating it well on this aspect. BBC Two, Channel 4 and BBC Three all rank lower, with around 4 in 10 viewers giving a score of 7-10 out of 10.

While delivery of high quality Soaps and Drama made in the UK falls fairly low in the hierarchy of importance ranking for PSB as a whole, channel delivery (particularly for BBC One and ITV1) in this area rates more positively, relative to other areas of delivery.

In terms of notable sub-group differences, regular viewers in younger age groups are much more likely than those in older age groups to agree with this statement for BBC One and Channel 4. Women are also more likely than men to rate BBC One, ITV1, Channel 4 and Five well. Regular viewers in Wales of BBC One, BBC Two, and Channel 4 are more likely to rate this statement well compared to viewers in England. Viewers from ethnic minority groups are more likely to rate Five well than the rest of the population – 43% compared to 31%.

Figure 6.2: Opinions on purpose 3 : it shows high quality soaps or dramas made in the UK

It shows high quality soaps or dramas made in the UK

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



Base for 'all PSB channels': All respondents, 6918

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)
 BBC1 = 4906, BBC2 = 2360, ITV1 = 3669, Channel 4 = 2473, five = 1384, BBC3 = 469, BBC4 = 284

Nations' and regions' provision

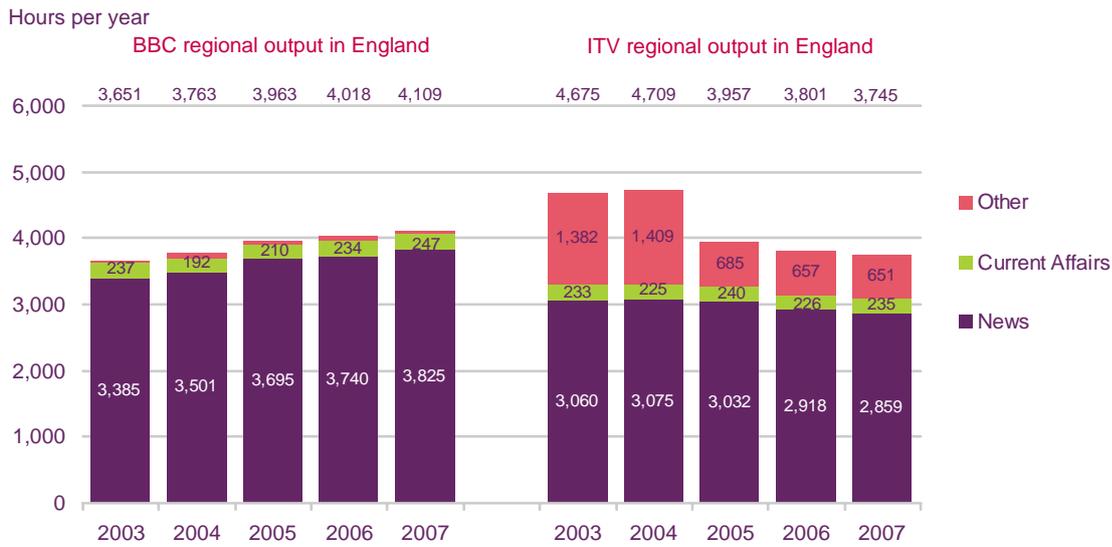
This section looks at non-network/regional output data by nation, viewing data for regional News, and opinions towards the PSB purposes relating to the regional elements of purpose 3.

Output hours

The BBC broadcasts all its regional programming in England on BBC One. Figure 6.3 shows the steady rate of increase in the volume of output since 2003, reaching a total of 4,109 hours in 2007, up from 3,651 hours. Most regional programming is News, with about 6% being Current Affairs and a small proportion (around 1%) in other genres.

By contrast, the volume of regional output on ITV1 in England has fallen over the same time period. This is as a result of reductions in programmes other than News and Current Affairs in 2005, following changes in the ITV regional licence conditions. At this time the quotas were standardised across most of the English regions, (except for the small licensees, Border and Channel, where slightly lower quotas apply), reducing the requirements from 2 ½ hours a week to just over one hour (in addition to the News and Current Affairs quota which totalled 6 hours weekly). Changes in the ITV1's lunchtime news bulletins also resulted in a reduction in regional News in 2006 and 2007. Consequently, the volume of regional programmes available for viewers in England has, for the last two years, been higher on the BBC than on ITV1.

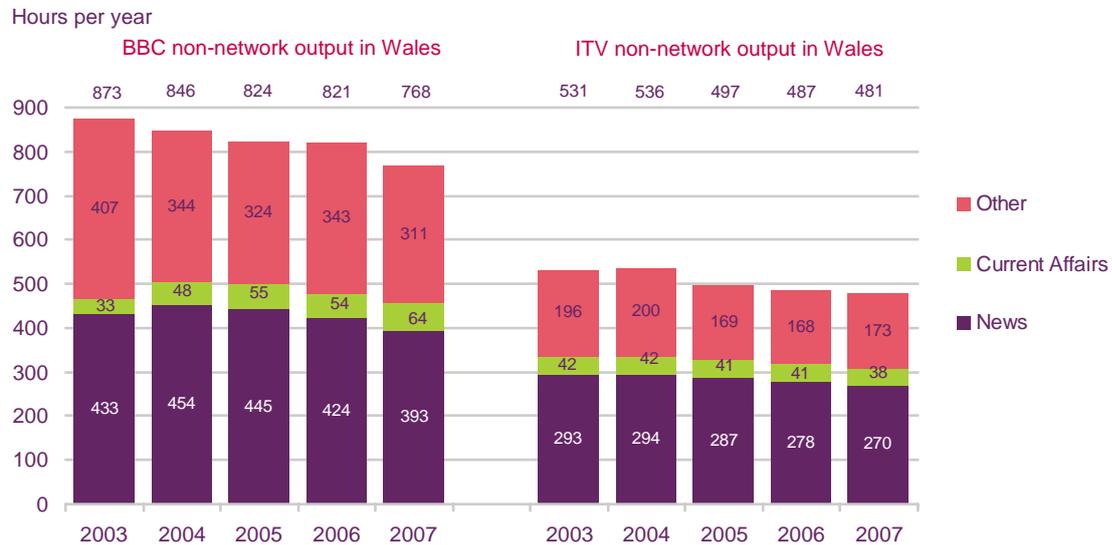
Figure 6.3: Regional output in England, 2003-2007³⁷



Source: Broadcaster returns
 Figures exclude repeats.

In Wales, the volume of non-network programme output has fallen, both on the BBC and on ITV1 since 2003, although the percentage reduction is greatest for the BBC, where the level has reduced by 12% since 2003; from 873 to 768 hours a year. While the volume of Current Affairs has increased, the amount of News and other programmes has diminished. The position on ITV1 shows an overall fall of 9% from 531 hours in 2003 down to 481 hours in 2007, with reductions seen in each of the three genres: News; Current Affairs; and Other.

Figure 6.4: Non-network output in Wales, 2003-2007³⁸



Source: Broadcaster returns
 Note: Figures exclude repeats

³⁷ Some elements of the data have been restated since the PSB Annual Report in 2007.

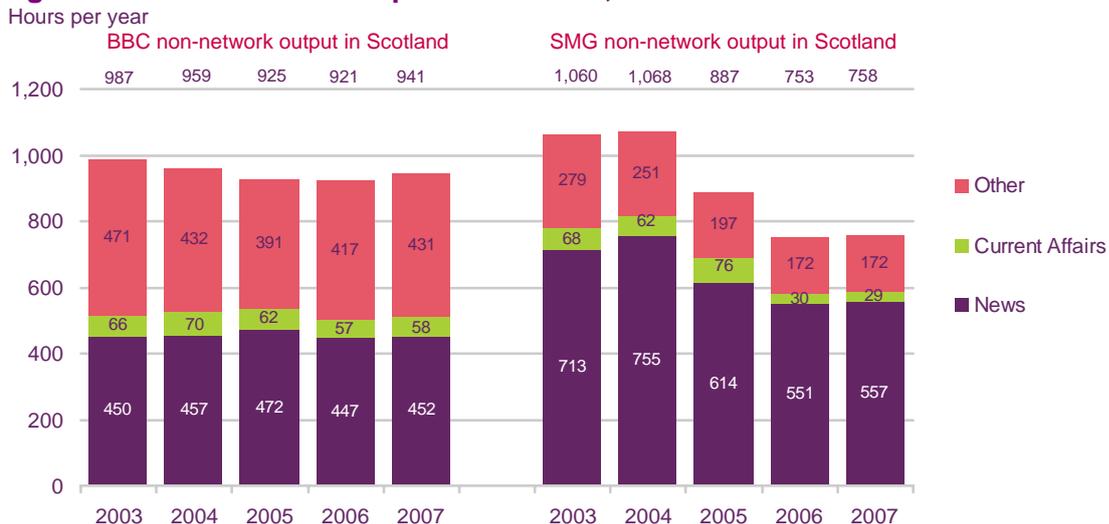
³⁸ Some elements of the data have been restated since the PSB Annual Report in 2007.

In Scotland the volume of non-network programmes broadcast on BBC One and Two rose fractionally between 2006 and 2007, after falls in the previous three years. The volume of News has been maintained at similar levels in most years, Current Affairs has reduced by 12% since 2003, while programmes in other genres have reduced by 40 hours or 8% over the same period.

On ITV1 there was a fall of 22% in total non-network output since 2003, across all genres. News reduced by 22%, Current Affairs by 57% and other programmes by 108 hours or 39%. This was largely due to the impact of Ofcom’s first PSB review which had the following results:

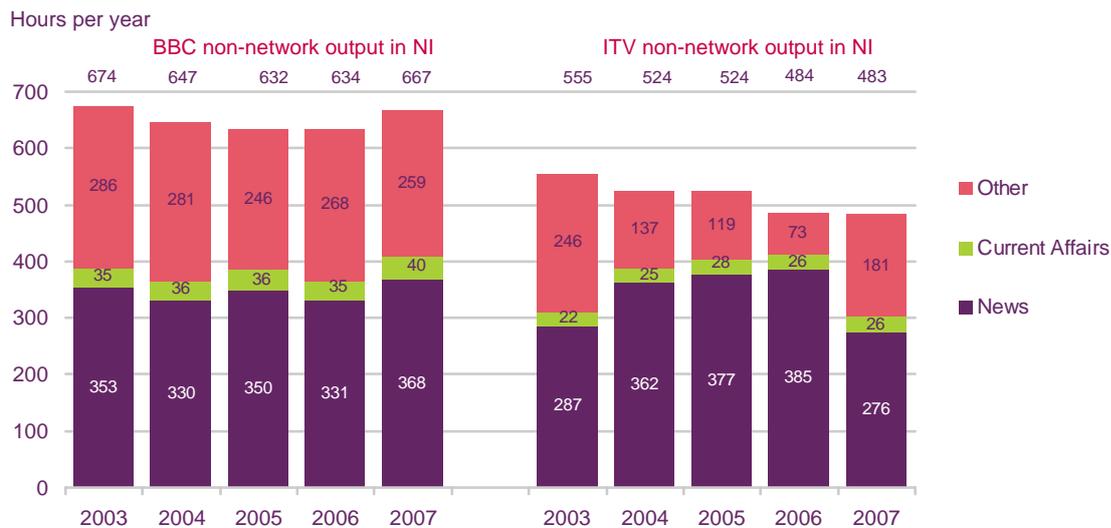
- The dropping of stv’s (now stv Central) lunchtime half-hour News programme.
- Bringing stv’s regional news obligations into line with the rest of the UK (they were previously higher)
- The introduction of a common schedule across stv Central and stv North for all non-news programming.

Figure 6.5: Non-network output in Scotland, 2003-2007



Source: Broadcaster returns
 Note: Figures exclude repeats

Figure 6.6 shows an uplift in the volume of non-network programmes in Northern Ireland on BBC One and Two between 2006 and 2007, reversing the downward trend seen in the previous three years. By contrast, and in common with the pattern seen in other nations and regions, ITV1 saw a fall in the volume of total hours in Northern Ireland – a reduction of 13% between 2003 and 2007.

Figure 6.6: Non-network output in Northern Ireland, 2003-2007³⁹

Source: Broadcaster returns

Note: Figures exclude repeats

Viewing figures

This section provides information on the share of viewing gained by the evening regional news programmes across the nations and regions of the UK. It also shows the average number of viewers on ITV1 for the Thursday evening slot, which has tended to show regional/national programmes.

Figure 6.7 shows the average number of viewers of the Thursday 7.30 – 8pm slot on ITV1 (generally occupied by nations' or regions' non-news programming) since 2003. From time to time, network programmes are shown in this time slot, and these were excluded from the analysis. It shows that audiences and share for this timeslot increased in the period 2003-2005, although in 2006 there was a decline in both audience and share. In 2007, however, this was reversed and the audience was larger than it had been in the past 5 years.

Figure 6.7: ITV1 nations and regions programmes, Thursday 7.30 - 8pm slot, 2003-2007

	2003	2004	2005	2006	2007
Audience (millions)	3.69	4.01	4.14	3.86	4.73
Audience share (%)	16.7	18.6	20.0	18.8	19.9

Source: BARB. Excludes network programmes broadcast in this timeslot during the period.

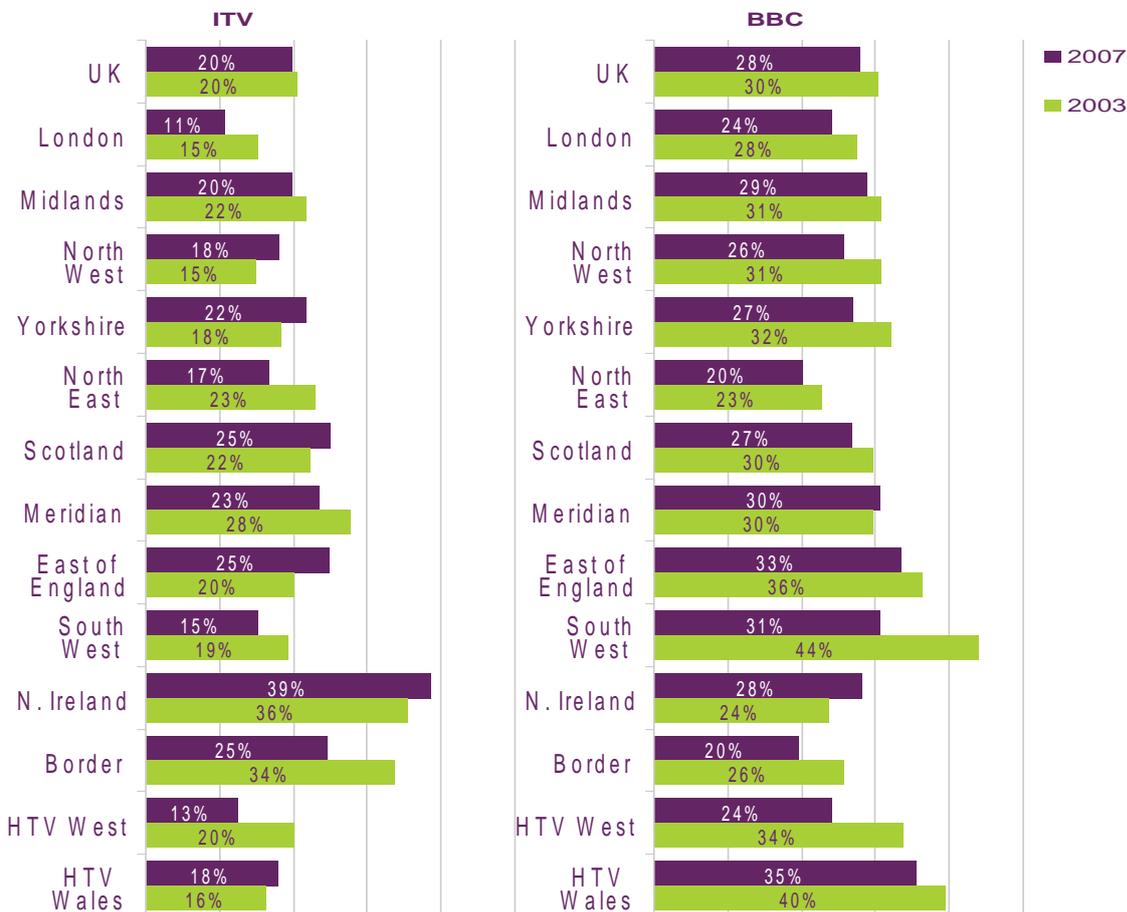
Figure 6.8 shows the share of all viewing gained by ITV1 and BBC One evening regional news programmes in 2003, compared to 2007.

BBC One early evening regional/national news continues to attract a higher audience share compared to ITV1, across the UK as a whole and across every region apart from Northern Ireland (Ulster) and Border.

³⁹ Some elements of the data have been restated since the PSB Annual Report in 2007.

However, comparing 2007 with 2003 data identifies that apart from Northern Ireland and Meridian, the share of audiences received by BBC regional news in each of the regions/nations has declined. ITV shows a more mixed picture, with around half of the regions/nations gaining an increased share in 2007 against 2003.

Figure 6.8: ITV1 and BBC One regional/national News: viewing share 2003-2007



Source: BARB

Note: ITV regions are used for this analysis, and so BBC1 share does not correlate exactly with distinct BBC regional news programmes

The 2006 PSB Annual Report found that programmes which are made in particular parts of the UK and reflect that identity tend to gain higher audiences in that part of the UK than elsewhere, due to relevance/identification. Figure 6.9 shows that this is still the case, in particular for *Rebus* in Scotland, *Heartbeat* in Yorkshire and *Taggart* in Scotland.

Figure 6.9: Selected TV Drama audience shares across UK and in region of production, 2007

Broadcaster	Programme	Location	Region/nation	Network audience share %	ITV region share %	Region/Nation uplift (% differential v.s network share)
BBC	Doctors	Birmingham	Midlands	30.3	31.1	2.8%
BBC	Doctor Who	Wales	Wales	39.0	40.4	3.6%
BBC	EastEnders	London	London	30.0	33.2	10.6%
ITV	Emmerdale	Leeds	Yorkshire	36.6	45.5	24.2%
ITV	Heartbeat	Yorkshire	Yorkshire	17.6	28.7	62.6%
ITV	The Royal	Yorkshire	Yorkshire	19.0	25.6	34.2%
ITV	Coronation St	Manchester	NW	44.0	57.0	29.3%
ITV	Taggart	Glasgow	Scotland	20.8	29.8	43.6%
ITV	Rebus	Edinburgh	Scotland	17.7	33.9	91.4%
ITV	Doc Martin	Cornwall	South West	31.4	38.4	22.3%
ITV	Bel's Boys	Northern Ireland	Ulster	4.3	5.2	19.7%
Channel 4	Shameless	Manchester	NW	14.8	18.9	27.6%
Channel 4	Hollyoaks	Chester	NW	10.0	10.4	4.6%

Source: BARB 2007

Audience impact

The PSB Tracker statements that relate to regional/national representation are the following:

Its regional news programmes provide a wide range of good quality news about my area

Aside from news, it provides a range of good quality programmes about my region/nation, made for people in my region/nation

Its entertainment and factual programmes show people from different parts of the UK

It portrays my region/nation well to the rest of the UK

Perceived importance of PSB statements

Provision of regional News is seen as one of the most important components of PSB – 78% of respondents felt it important that regional News programmes provided a range of good quality news (this is at the same level as the importance of news and information at a national/international level for purpose 1).

The statements relating to the portrayal of people in the nations and regions, and non-News regional programmes are important for most people, although they rated lower in the overall hierarchy of PSB purpose and characteristic statements.

There are some notable differences in perceived importance and delivery by nation, and these are identified throughout the section in relation to each separate element of this purpose.

Figure 6.10 shows a summary of the importance scores and satisfaction ratings for the relevant PSB tracker statements. The importance ratings indicate that provision of regional news/programming and positive regional portrayal is generally considered important – with people in Northern Ireland more likely to have considered these aspects important than those in other nations.

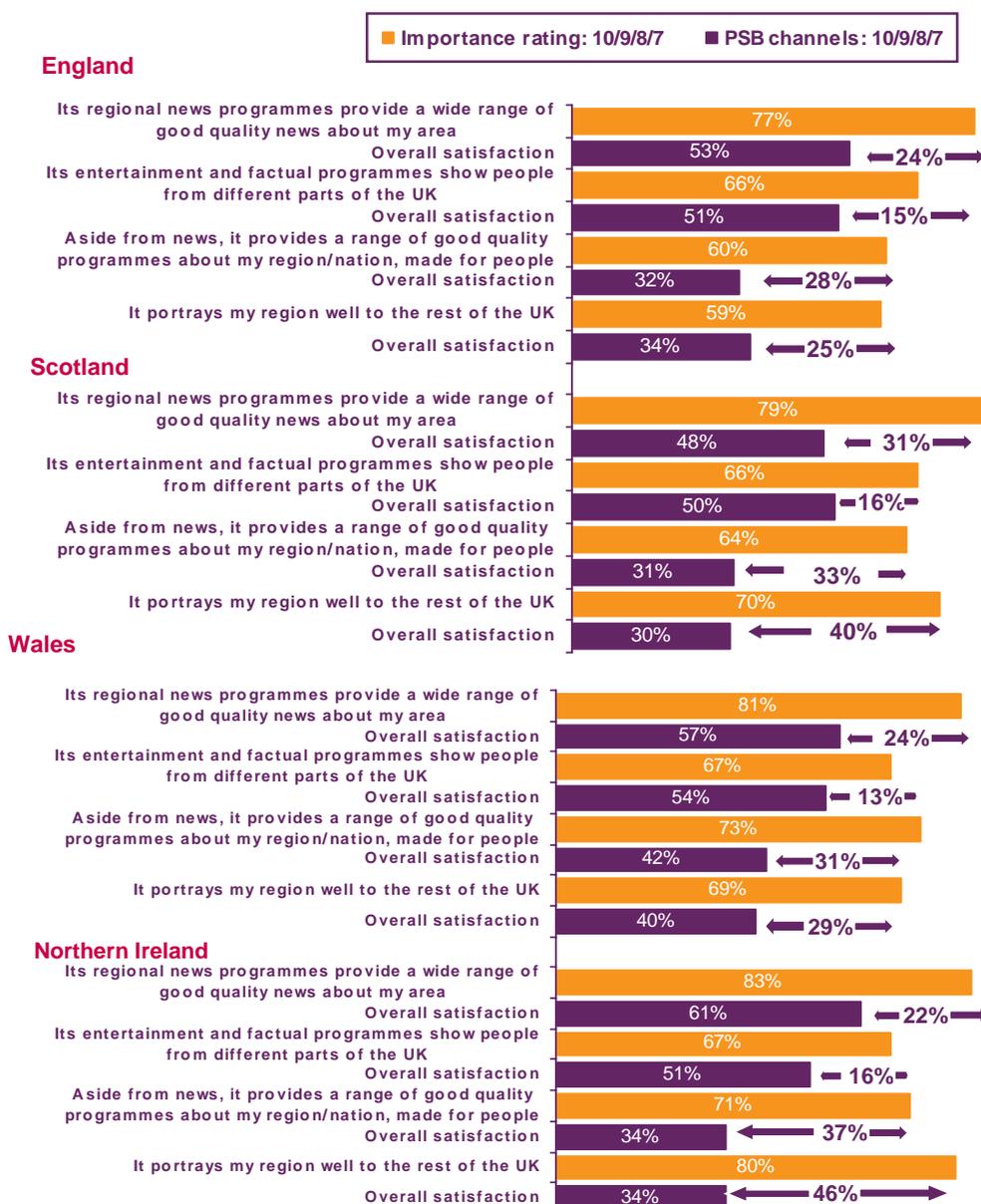
Although fewer people find *the positive portrayal of people in the nations/regions to the rest of the UK*, and *provision of non-news regional programmes* important than *regional news*, these are still seen as important by just under two-thirds overall. In particular, the positive portrayal of lives in the nations is seen as important by those in the devolved nations. Non-

news programming is thought of as particularly important by people in Wales and Northern Ireland.

In addition to the scores, the difference between the importance score and the satisfaction rating is shown (as the gap). A large gap indicates that, while viewers consider this element important, the channels are not currently considered to be delivering well in this area.

Scotland has fairly large satisfaction gaps across all of the areas of provision e.g. a -40% gap for the portrayal of Scotland to the rest of the UK. Northern Ireland has the biggest gaps for provision of good quality non-news programmes (-37%) and positive portrayal of the nation to the rest of the UK (-46%).

Figure 6.10: Perceived importance and perceived delivery of PSB statements, by nation



•Extent to which the characteristics is important, where 10 means "extremely important" and 1 means "not at all important"
 •Extent to which the characteristic applies to the channels together, where 10 means 'applies completely' and 1 means 'does not apply at all'
 Base = England. Importance = 3085, satisfaction = 4092. Scotland Importance = 3085, satisfaction = 4092. Wales, Importance = 752, satisfaction = 1010. Scotland Importance = 748, satisfaction = 1023.
 Amalgamated data: Jan 07, April 07, July 07, Oct 07.

Perceived delivery of PSB statements

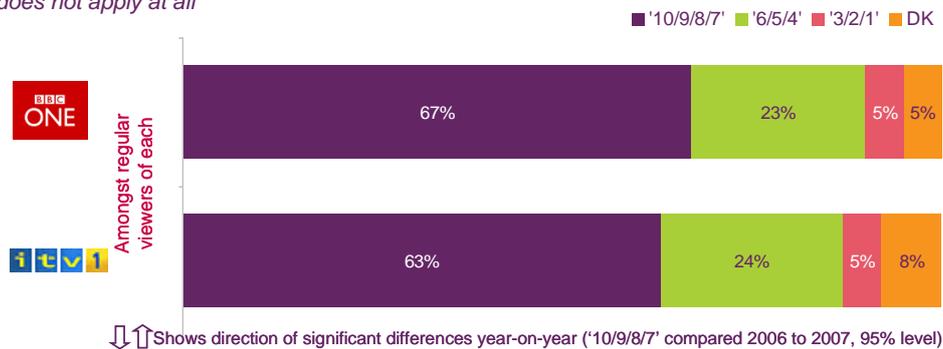
Only the BBC and ITV show regional news programmes, and therefore Figure 6.11 shows results for these channels only. Responses from regular viewers of these channels regarding delivery in this area are very similar at 67% and 63% respectively, indicating that around two-thirds of viewers are satisfied with regional news delivery on these channels.

In terms of notable sub-group differences, viewers aged 65+, female viewers and people in socio-economic groups C1C2 and DE are more likely than the rest of the UK to rate regional news provision as being well delivered. Viewers aged 25-34 are less likely to do so.

Figure 6.11: Opinions on purpose 3 : regional News programmes

Its regional news programmes provide a wide range of good quality news about my area

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, ITV1 = 3724

Non-News regional programmes

Only BBC One, BBC Two and ITV1 show non-News regional programmes, and therefore Figure 6.12 shows results for these channels only.

Non-News regional programming provision fared less well when compared to the regional News ratings. Looking at the individual channels, approximately one in four regular viewers of BBC One and ITV1 rated them well in this area (20% lower than the regional news ratings). BBC Two came in lower again with less than a third of its regular viewers (28%) rating it well in this area.

Views in the devolved nations were more positive than those in England. Within England, opinions were more positive in northern England than in the South East, particularly London. People in Northern Ireland and Wales are particularly keen to have non-News provision, although the gap with perceived delivery is greater in Northern Ireland.

Regular viewers aged 65+, those aged 16-24, people in socio-economic group DE and people in Wales are more likely to rate the channels well on delivery of this part of PSB than the rest of the population.

Figure 6.12: Opinions on purpose 3: non-News regional programmes

Aside from news, it provides a range of good quality programmes about my region, made for people in my region
 Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all'



Base for 'all PSB channels': All respondents, 3567
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: July 07, Oct 07)
 BBC1 = 2397, BBC2 = 1097, ITV1 = 1752

Showing people from different parts of the UK

Figure 6.13 below shows the extent to which regular viewers of the PSB channels saw Entertainment and Factual programmes on the channels as involving people from different parts of the UK.

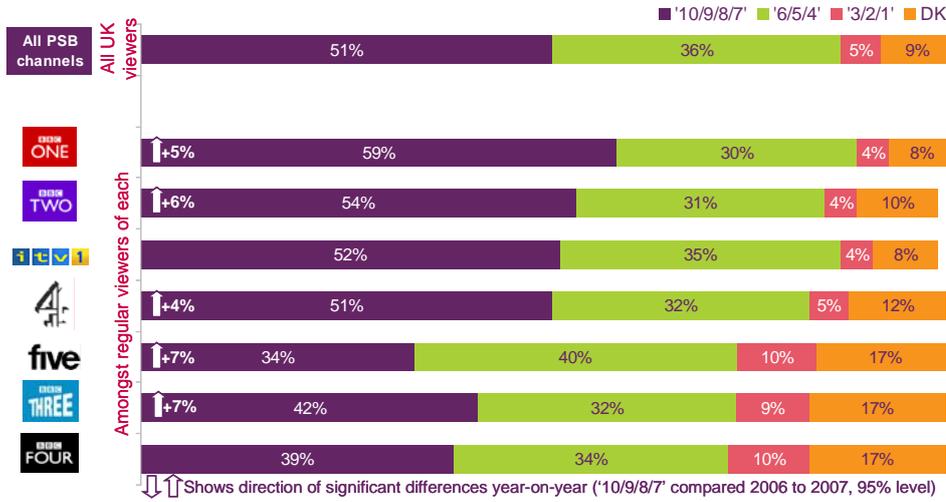
Looking at individual channels, regular viewers of BBC One were slightly more likely to say there was involvement of people from different parts of the UK within the programmes, although BBC Two, ITV1 and Channel 4 were not far behind⁴⁰. Five is least likely to contribute to this PSB element.

⁴⁰ BBC One, BBC Two, BBC Three, Channel 4 and Five all experienced 4+ percentage point rises on last year.

Figure 6.13: Opinions on purpose 3: reflecting UK cultural identity

Its entertainment and factual programmes show people from different parts of the UK

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287

Portrayal of region to rest of UK

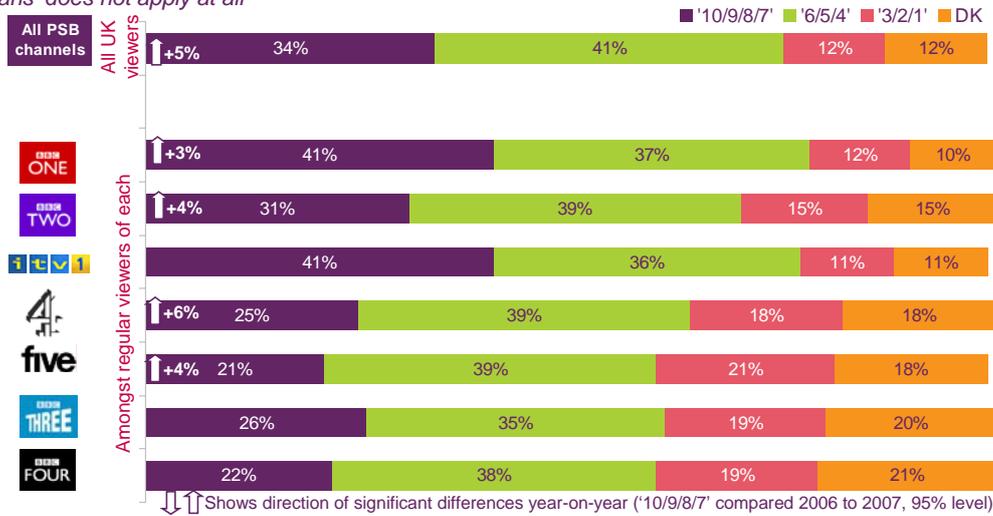
ITV1 and BBC One score more highly than the other channels on this element, with 41% of their regular viewers agreeing with the statement. However, it is important to remember that this element of the PSB purposes and characteristics is seen to be delivered well by a lower proportion in general.

People aged over 65 were more likely than other age groups to rate the channels well on this element of PSB – 50% of this age group rate BBC One well, 39% for BBC Two, and 49% for ITV1. Those in socio-economic group DE are also more likely to rate these three channels well on this.

Figure 6.14: Opinions on purpose 3 : *portrayal of region to rest of UK*

It portrays my region / nation well to the rest of the UK

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 533

Note: Statement was changed in 2007 so that respondents in Scotland/Wales/NI were asked about 'nation', rather than region

Section 7

PSB purpose 4: *representing diversity and alternative viewpoints*

Introduction

This chapter examines in detail PSB purpose 4, which is defined as:

To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere

This PSB purpose is not aligned to any one programme genre. However, there are a range of discrete programmes that may fit this PSB purpose, for example, particular types of social documentary, or programmes that reflect multicultural themes or represent diversity. Because of the range of programmes that fall within this area, here are no output data or viewing data (BARB) within this section. The section focuses on the main five channels, plus BBC Three and BBC Four.

The statement from the PSB Tracker that relate to this purpose is:

Its programmes show different kinds of cultures and opinions within the UK

Respondents are likely to have thought about a range of programme types when giving their views on how PSB channels deliver this element of PSB.

This purpose is particularly linked to Channel 4's remit, as well as that of the BBC.

Summary findings

Importance of purpose 4 to viewers

- Almost 70% of the UK population saw this purpose as important. In terms of the perceived delivery of all of the PSB channels against this purpose. Less than 50% rate the channels together as performing well.

Audience impact

- Forty-seven per cent of UK TV viewers say that the PSB channels together perform well in terms of having programmes that '*show different kinds of cultures and opinions within the UK*', up 9 percentage points on last year. Some 69% of viewers rate the portrayal of different kinds of cultures and opinions as an important element of PSB.
- Representing diversity and alternative viewpoints continues to be an area of strength for Channel 4 (53%) alongside BBC One (53%) and BBC Two (55%). Regular viewers aged over 45 are less likely to rate Channel 4 highly.
- Female and younger viewers, and those in Wales, are more likely than the rest of the population to rate PSB delivery against this purpose as high, while people in socio-economic group AB are less likely. Regular viewers aged over 45 are less likely to rate Channel 4 highly on this.

Audience impact

Viewers rated the extent to which the statement *'its programmes show different kinds of cultures and opinions within the UK'* applies to the channels, in order to measure the perceived performance of the PSB channels against this purpose (Figure 6.3).

Perceived importance of PSB statement

Some 69% of viewers rate the portrayal of different kinds of cultures and opinions as an important element of PSB.

Female viewers and people in socio-economic group AB are more likely to rate this purpose as important, compared to the rest of the population.

Perceived delivery of PSB statement

Forty-seven per cent of UK TV viewers say that the PSB channels together perform well in terms of having programmes that *'show different kinds of cultures and opinions within the UK'*.

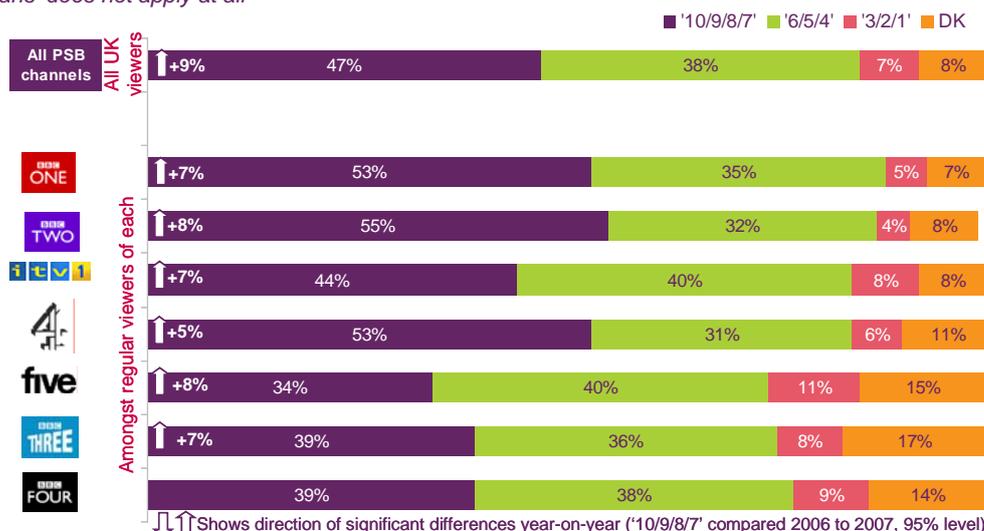
Female and younger viewers, and those in Wales, are more likely, and people in socio-economic group AB are less likely than the rest of the population to rate PSB delivery against this purpose highly. Regular viewers aged over 45 are less likely to rate Channel 4 highly.

Representing diversity and alternative viewpoints continues to be an area of strength for Channel 4 (53%), BBC One (53%) and BBC Two (55%). Regular viewers' opinions of each of the main PSB channels have become more positive in this area, but the relative contribution of each of the channels remains the same in 2007 as 2006.

Figure 7.1: Opinions on purpose 4 : representing diversity and alternative viewpoints

Its programmes show different kinds of cultures and opinions within the UK

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287

Section 8

Public Service Broadcasting: characteristics

Introduction

This chapter reports on the PSB characteristics:

- *High quality – well funded and well produced*
- *Original – new UK content, rather than repeats or acquisitions*
- *Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones*
- *Challenging – making viewers think*
- *Engaging – remaining accessible and attractive to viewers*

'Trust' has now been added as an extra dimension to be reported on alongside the PSB characteristics. This was included as a statement in the 2007 PSB Tracker survey in order to monitor the extent to which people trust the main PSB channels as the digital TV environment expands. The statement was included partly as a result of the issues surrounding phone votes within programmes on the PSB channels, and in order to understand people's opinions of the channels after this issue was resolved.

Due to the less tangible nature of the PSB characteristics, this section focuses mainly on viewer opinions gathered through the PSB Tracker and the BBC-GfK Pulse survey, rather than viewing or output information relating to particular genres.

The two exceptions to this are *Engaging*, which includes viewing figures of the programmes gaining the largest average audiences, and *Original*, which includes output hours showing the amounts of originated content broadcast.

Some of the PSB characteristics apply particularly to certain channels. Innovation is a key element of Channel 4's remit, and ITV1 and Five have a particular goal to provide quality UK productions.

Summary findings

High quality

- A similar proportion of viewers rated the PSB channels together as showing well-made, high-quality programmes in 2006 and 2007 (58% and 59% respectively⁴¹).
- Of all the PSB characteristics, *Quality* receives the highest percentage of viewers rating the PSB channels positively, although this is still an area with a notable satisfaction gap between perceived importance and delivery.
- The perceived quality of programmes is highest for BBC channels (BBC One 74% and BBC Two 76%), followed by ITV1 (63%) and Channel 4 (59%).
- Certain groups of viewers rate particular channels more positively. Younger viewers (aged 16-24 years) across all channels tend to have a more positive view of the quality of the programmes than older viewers (55+). This is particularly noticeable for Channel 4; 71% of its regular viewers aged 16-24 say it shows high-quality programmes compared to 52-57% of viewers aged 35+.
- In the Pulse survey, over eight in ten viewers of all programmes across the five main PSB channel thought the programmes were high quality across all of the main five channels.

Trust

- The clear majority of viewers feel that it is important to be able to trust PSB channels; 84% rated this as important. Trust is less important for younger and older viewers, while those aged 35-44 are most likely to rate this statement as important.
- Over 70% of BBC One and BBC Two regular viewers see the channels as being trustworthy. ITV1, Channel 4, BBC Three and BBC Four are seen as trustworthy to a similar extent by around 6 in 10 viewers. Five rates the lowest of all the channels on this measure, but nevertheless, 46% of viewers trust the channel.

Original

- All-day output of first-run originated programmes on the main PSB channels increased between 2006 and 2007, largely driven by an increase in the amount of late-night phone-in quiz programmes on ITV1 and Five, which were produced in-house or commissioned
- Just over 40% of regular viewers of the PSB channels feel that, together, the channels show '*enough new programmes, made in the UK*'. This is one of the lowest-rated characteristics and has one of the largest satisfaction gaps between perceived importance and delivery.

⁴¹ Data in 2006 was collected in Oct only

- The Pulse survey found that that UK-made programmes were much more likely to have taught the viewers something new (54% indicated this for UK-originated programmes while 35% said this about non-UK originated programmes). UK programmes were also more likely to be discussed by viewers after watching (72% vs. 68%) and to be thought of as inspiring (43% vs. 41%) and thought provoking (58% and 54%).
- The areas in which non-UK programmes were seen to perform better than UK programmes were the perceived quality of the programming, and innovation.

Innovative

- Around 40% of viewers agree that the PSB channels together show programmes with new ideas and different approaches. Opinions on this were more positive in 2007 than in 2006. However, this is still an area with a considerable 'satisfaction gap' between perceived importance and delivery.
- BBC Two and Channel 4 are seen by their regular viewers to be best delivering innovation - over 50% rate the channels well on this statement. For Channel 4, over 60% of its 16-34 viewers rate it well, compared to less than 40% of viewers aged over 55.
- The Pulse survey found that in 2006 Channel 4 was the channel most likely to be seen as showing original and different programmes, but in 2007 BBC Two's programmes were rated more positively on this; BBC Two, Channel 4 and Five are still more likely to have their programmes rated as '*original and different*' than BBC One and ITV1.

Challenging

- Almost half of UK viewers rated the PSBs, taken together, positively in their showing of '*programmes that make me stop and think*'.
- As in 2006, BBC Two, BBC One and Channel 4 were most likely to be seen by regular viewers as showing challenging programmes (65%, 58% and 56% respectively). ITV1 (45%) and Five (39%) were less likely to be seen as showing programmes that made people stop and think.
- The Pulse survey found that of the programmes watched on the five main channels, more than half the responses agreed that the programme had been thought-provoking. In both 2006 and 2007 this was likely to be said about programmes on Five and BBC Two; each had 63% of responses in agreement in 2007.

Engaging

- The programmes gaining the largest average audience figures on each channel in 2007 were: *EastEnders* on BBC One, *Top Gear* on BBC Two, *Rugby World Cup* on ITV1, *Celebrity Big Brother* on Channel 4, *CSI* on Five, *EastEnders* on BBC Three and *Fanny Hill* on BBC Four.
- Programmes in the 30 programmes with the largest audiences across the PSB channels were most likely to fall into the category of Entertainment (43%) or Drama Series/Serials (20%).

- Nearly two-thirds of BBC One and BBC Two regular viewers agreed that these channels broadcast programmes they wanted to watch. Half of Five's regular viewers felt it showed programmes they wanted to watch. This is the PSB characteristic that Five performs best on, as rated by its viewers, and is up 8% on last year.
- Channel 4's younger regular viewers felt particularly strongly about how engaging the channel's content was – 77% of its 16-24 regular viewers rated it positively. Seven in ten regular viewers from ethnic minority groups also rated Channel 4 positively in this area.
- For all the PSB channels, women were more likely than men to feel satisfied with the programmes available, particularly on BBC One and ITV1
- Forty-five per cent felt that the PSB channels reflected their interests. BBC News 24 scored highest, with 60% of its regular viewers rating it 7-10 out of 10. Regular viewers of Five and BBC Three felt least that the channels reflected their own interests and concerns.

PSB Tracker

The PSB Tracker survey used the following statements to explore respondents' views of the PSB characteristics:

It shows well-made, high quality programmes

I trust this channel

It shows enough new programmes made in the UK

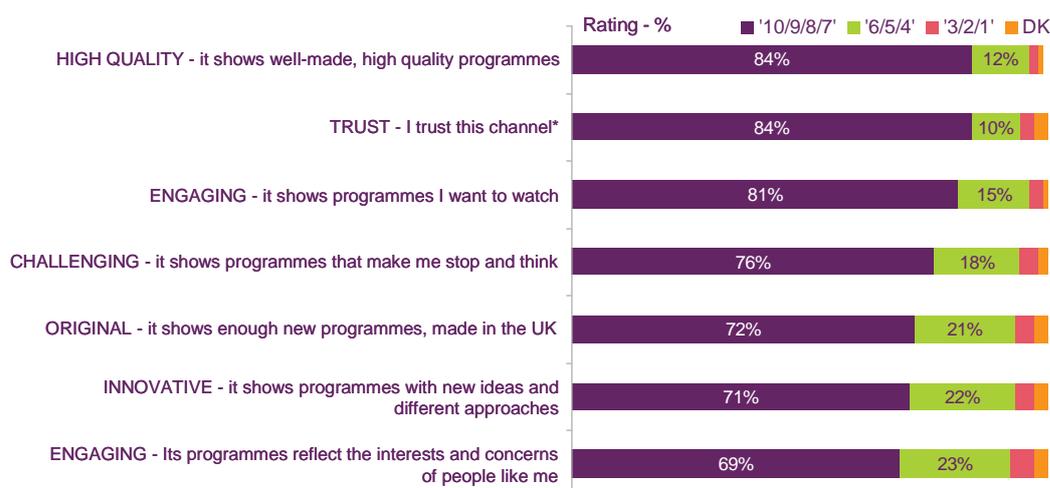
It shows programmes with new ideas and different approaches

It shows programmes that make me stop and think

It shows programmes I want to watch

Its programmes reflect the interests and concerns of people like me

Section 3 provided an overview of audience views on the perceived importance of the PSB purposes and characteristics. The perceived importance of the PSB characteristics is shown as a reminder here in Figure 8.1. The results showed that *high quality*, *trustworthy* and *engaging* are all judged important by over eight in ten of all respondents.

Figure 8.1: The importance of PSB characteristics for viewers

Q: And now, thinking about importance, how important do you think it is, in general, that these TV channels do this? Where 10 means "extremely important" and 1 is "not at all important."

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

Base for 'all PSB channels': All respondents = 5357;

* Base for 'all PSB channels': All respondents = 913; Oct 07 data only

In terms of performance ratings, the collective channel scores also delivered best in these areas, with the top three rankings performing in the same order (*high quality* – 59%, *trust* – 53%, *engaging* 52%). NB As section 3 indicated, there are still sizeable gaps between the perceived importance of these elements and the perceived performance on them.

The report will now discuss each characteristic individually.

Quality - It shows well-made, high quality programmes

Audience impact

The PSB Tracker asked regular viewers of each channel to what extent the statement '*it shows well-made high-quality programmes*' applied to each channel separately and to what extent it applied to the PSB channels collectively. Responses are shown in Figure 8.2.

Of all the PSB characteristics, *quality* has the largest percentage of viewers rating the channels collectively as performing well on this (59%) and is similar to the score achieved in 2006 (58%).

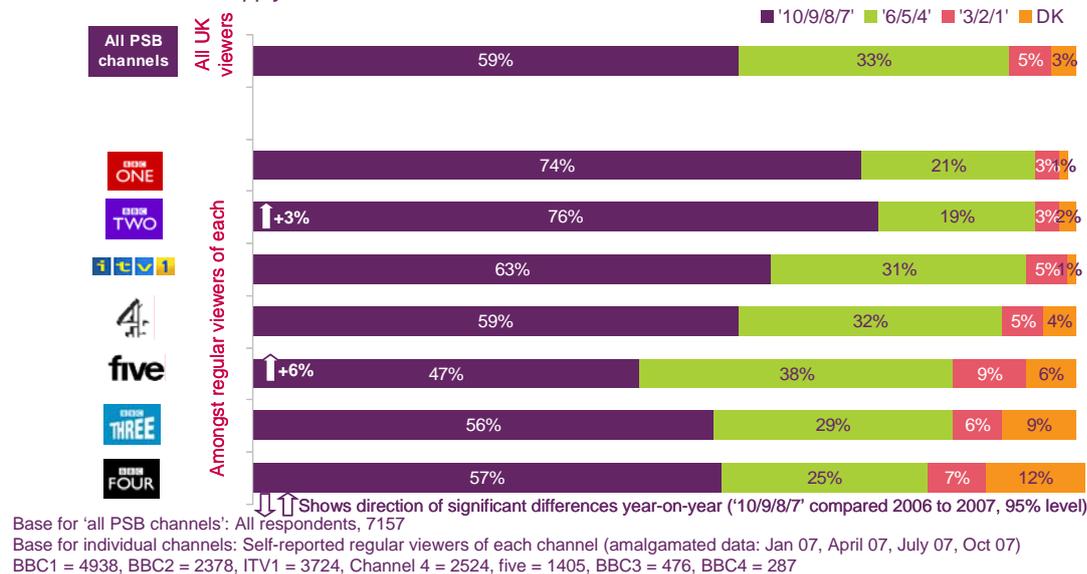
Looking at channels individually, over 70% of regular viewers of BBC One and BBC Two rate those channels well in terms of the quality of their programming. Channel Five receives the smallest portion of positive ratings – however, just under half of its viewers feel that it delivers well in this area.

Certain groups of viewers rate particular channels more positively than other groups. Younger viewers (aged 16-24 years) across all channels tend to have a more positive view of the quality of the programmes than older viewers (55+). This is particularly true for Channel 4 - 71% of its regular viewers aged 16-24 say it shows high-quality programmes compared to 52-57% of viewers aged 35+.

Figure 8.2: PSB Tracker: viewer opinions of high quality programmes

It shows well-made, high quality programmes

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



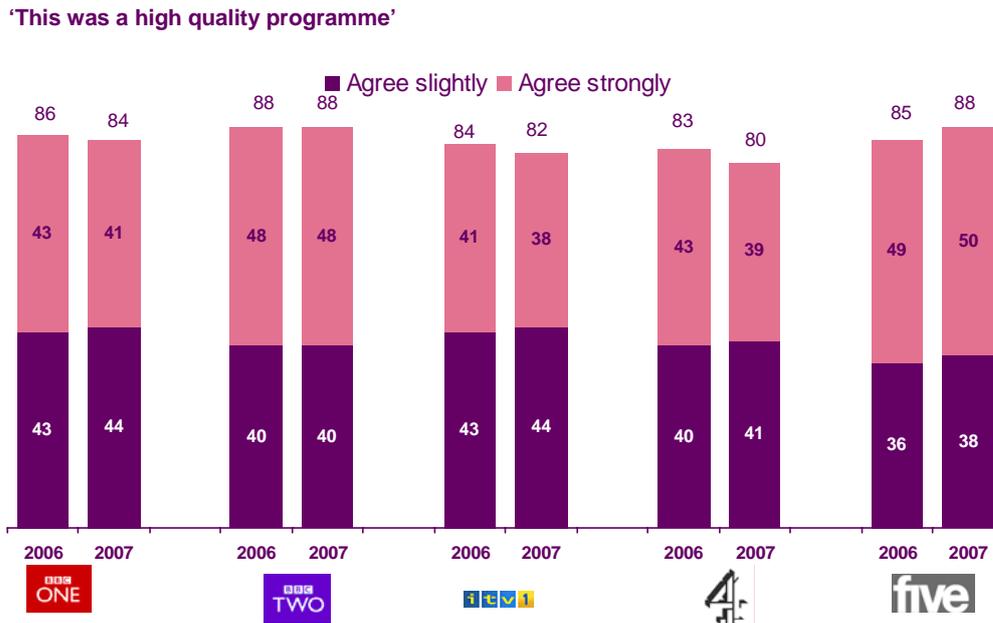
Pulse survey data

Respondents to the Pulse survey were asked to score the following statement about all the programmes they had watched:

This was a high quality programme

Programmes watched for the Pulse survey tended to score positively in terms of delivering quality broadcasting⁴². Over eight in ten viewers placed a high rating on programmes delivered across all of the main five channels.

⁴² Pulse data are not comparable with the data on quality gathered in the PSB Tracker, due to methodological differences, so direct comparisons should not be made. The PSB Tracker asks about opinions on the whole array of programmes available, and therefore includes programmes and genres that the respondents are not interested in or may dislike, whereas the Pulse survey asks about the quality of viewed programmes only; i.e. those that the viewer chose to watch.

Figure 8.3: Pulse survey opinions: *programme quality*

Base for all responses to programmes watched by Pulse respondents

Responses: BBC One 1692586, BBC Two 548246, ITV1 1291876, Channel 4 681975, Five 329753. 2007, BBC One 1338840, BBC Two 372248, ITV1 1160021, Channel 4 358108, Five 273761

Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006, Jan-Dec 2007

Trust - I trust this channel

Audience impact

Viewers ranked this area as one of the most important PSB characteristics alongside *quality* (84% rated its importance as high). There are, however, some sub-group differences; those aged 35-44 are more likely than any other age group to rate this statement as important.

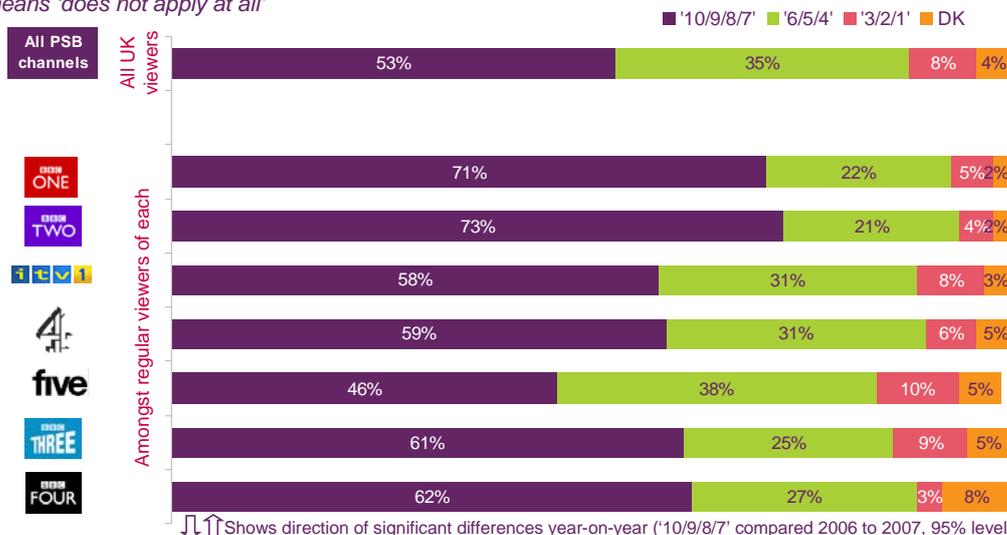
Figure 8.4 shows the extent to which regular viewers trust the PSB channels. Over 70% of BBC One and BBC Two viewers rate the channels as being *trustworthy*. ITV1, Channel 4, BBC Three and BBC Four are seen as trustworthy to a similar extent by around 6 in 10 viewers. Channel Five rates the lowest of all the channels on this characteristic, but 46% of its viewers still trust the channel.

Regular viewers aged 25-34 are more likely than the average to rate Channel 4 as performing well in this regard. Those in socio-economic groups AB and DE are also more likely to highly rate BBC Two and ITV1 respectively.

Figure 8.4: PSB Tracker: *trust in PSB channels*

I trust this channel

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



Base for 'all PSB channels': All respondents, 1809 * Small base size – data should be viewed as indicative only
 Base for individual channels: Self-reported regular viewers of each channel (Oct 07 only)
 BBC1 = 1215, BBC2 = 595, ITV1 = 900, Channel 4 = 613, five = 337, BBC3 = 110, BBC4 = 70*

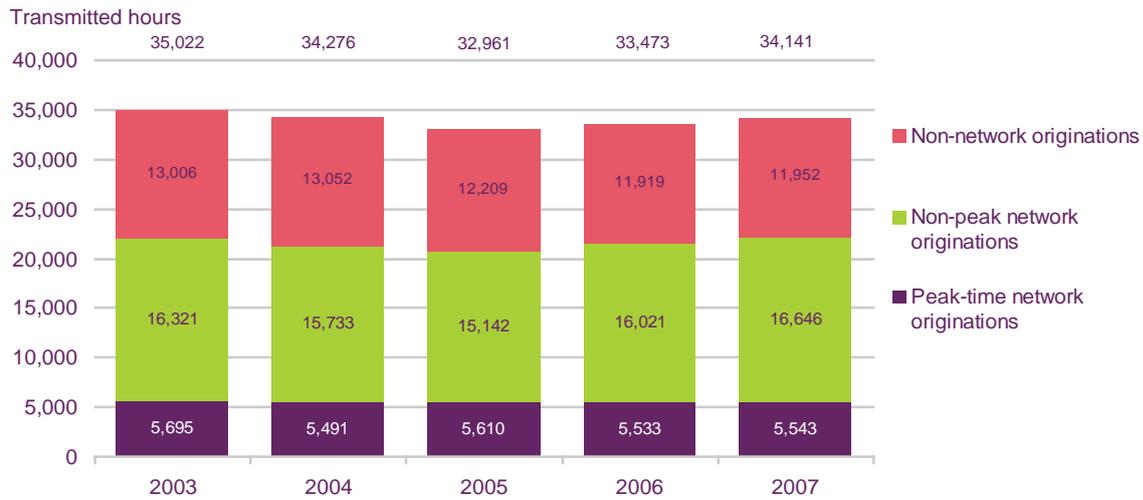
Original It shows enough new programmes made in the UK

Output hours

Figure 8.5 shows that the number of hours of first-run originations broadcast by the main five channels increased in both 2006 and 2007 and stood at 34,141 hours in 2007 (although it is still below the levels in 2003 and 2004).

In peak time, network originations have declined by just under 3% since 2003 - from about 109 hours a week to 106 hours a week in 2007. Outside peak time, the volume of originated programmes fell in 2004 and again in 2005 but picked up in 2006 and 2007, largely because of the increase in live late-night phone-in quiz programmes on ITV1 and Five, which were produced in-house or commissioned. The level of non-network programmes fell in 2005 as a result of agreed reductions in ITV1's regional quotas which affected non-News and Current Affairs programmes.

Investment in first-run originated programming reduced in real terms by 10% from £3 billion in 2003 to £2.7 billion in 2007. Within this, non-network originations fell by 19% from £406 million in 2003 to £327 million in 2007.

Figure 8.5: Output of originated programmes on the main five channels, 2003-2007

Source: Broadcaster returns

Original output – new programmes made in the UK

Audience impact

Figure 8.6 shows the extent to which regular viewers of the PSB channels feel that the channels show 'enough new programmes, made in the UK'. Against this statement, over 40% of viewers give all PSB channels together a score of 7-10 out of 10.

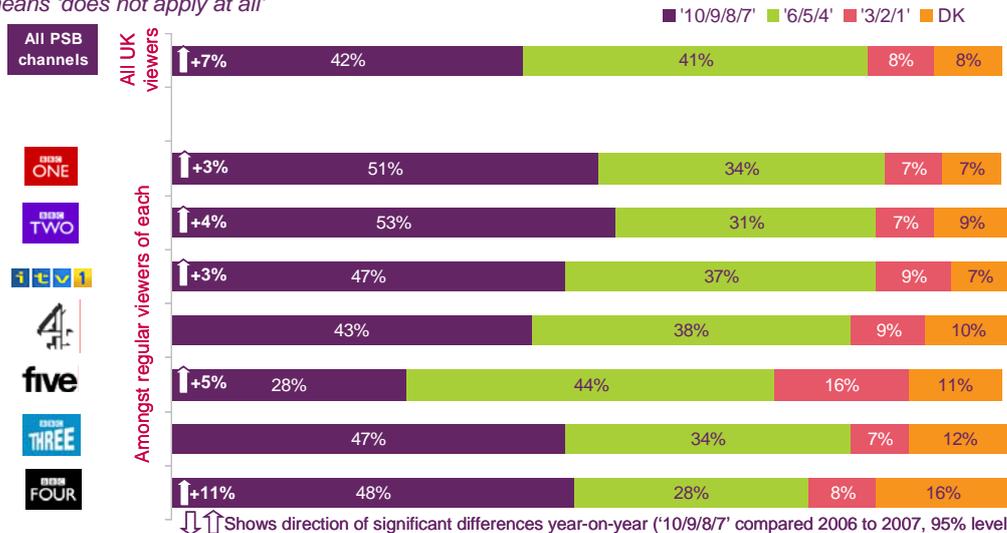
Just over half of all regular viewers of BBC One, BBC Two and BBC News 24 gave the channels a score of 7-10 out of 10 on this aspect of PSB. Less than 30% of Five's regular viewers rated the channel positively, with 44% giving it a moderate rating and 16% giving it a low rating, perhaps because regular viewers were aware of its levels of acquired overseas programming.

Regular older viewers aged 55+ are less likely than other viewers to rate BBC One, BBC Two, ITV1 and Channel 4 well in this regard. Viewers under 24 years old are more likely to rate the channels, taken together, as delivering this (53%) than the older age groups of 35-44 (39%) and 55-64 (37%).

Figure 8.6: Original: audience views

It shows enough new programmes, made in the UK

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

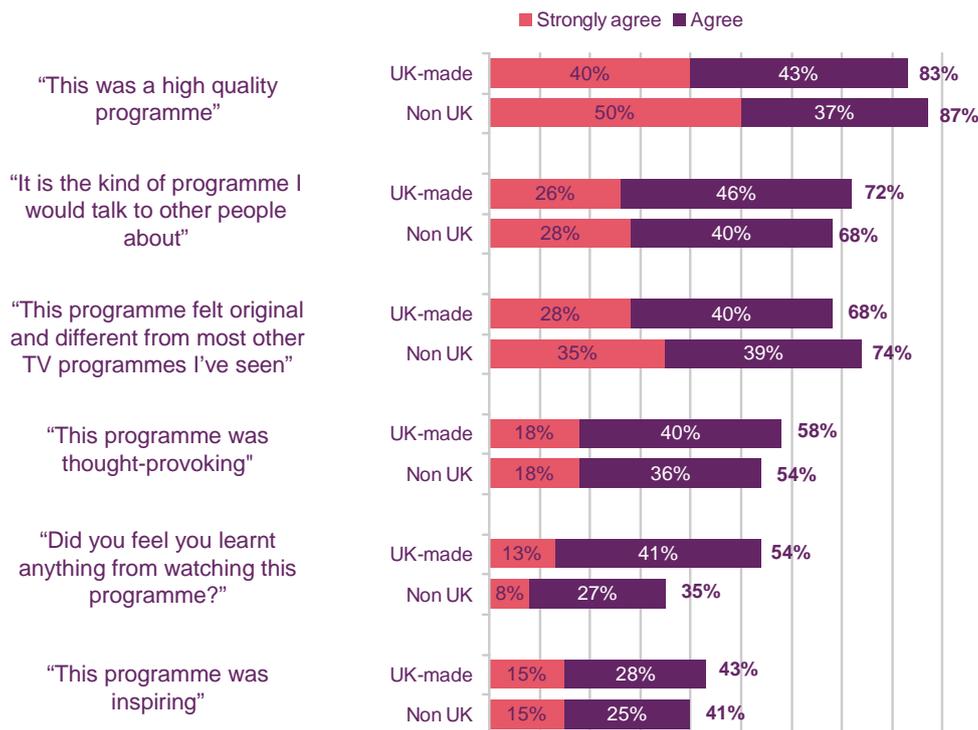
BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287

Respondents to the Pulse survey were asked a series of questions about their opinions of programmes they had watched. In this section, we compare their opinions of UK-originated programmes and of those that are made elsewhere in the world, in order to give a feel for viewers' responses to home-grown programmes in 2007. This analysis looks at all programmes, regardless of genre or channel.

Figure 8.7 shows that UK-made programmes were much more likely to have taught the viewers something new (54% vs. 35%). UK programmes were also more likely to be discussed by viewers after watching (72% vs. 68%) and to be thought of as inspiring (43% vs. 41%) and thought-provoking (58% and 54%).

The areas in which non-UK programming had the edge over UK-produced programming were the perceived quality of the programming and innovation. Eighty-six per cent of viewers of non-UK programming said that the programmes were high quality, in comparison to 83% of the viewers of UK-made programming. Seventy-four per cent of the viewers of non-UK programming said that the programmes were 'original and different from most other TV programmes', in comparison to 63% of the viewers of UK-made programming.

Figure 8.7: UK versus non-UK originated programming: audience views



All differences between UK-made and non-UK progs are significantly different for strongly agree/disagree responses combined, 95% level
 Base for all responses to programmes watched by Pulse respondents. Responses: 2007, UK-made 2887911, Non-UK made 443410
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2007

Innovation - It shows programmes with new ideas and different approaches

Audience impact

New ideas and different approaches

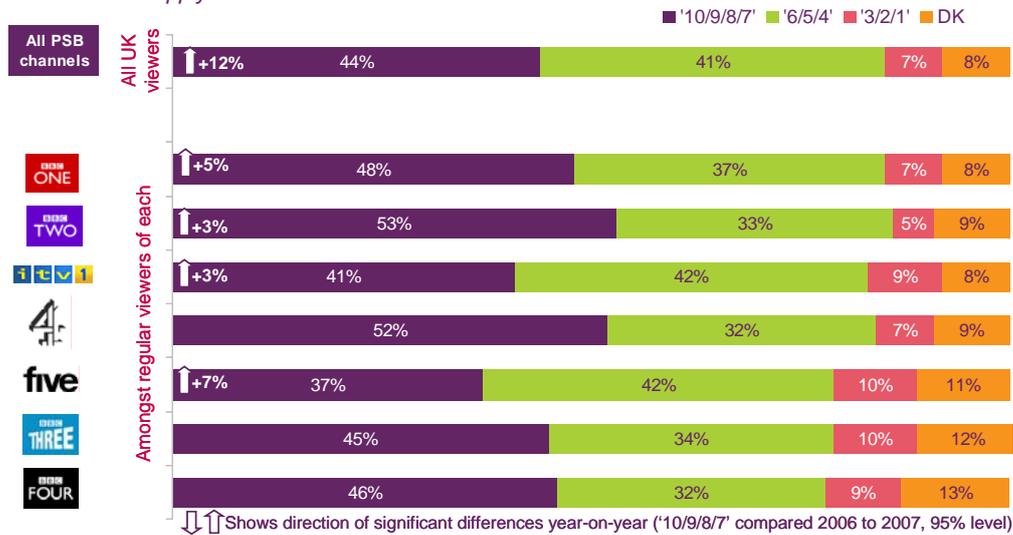
Figure 8.8 shows regular viewers' opinions about the extent to which channels show 'programmes with new ideas and different approaches'.

BBC Two and Channel 4 are seen by their regular viewers to be delivering the highest overall against this statement – over 50% rate the channels well. For Channel 4, over 60% of its 16-34 viewers rate it positively, compared to less than 40% of viewers aged over 55.

Figure 8.8: Innovation: audience views

It shows programmes with new ideas and different approaches

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287

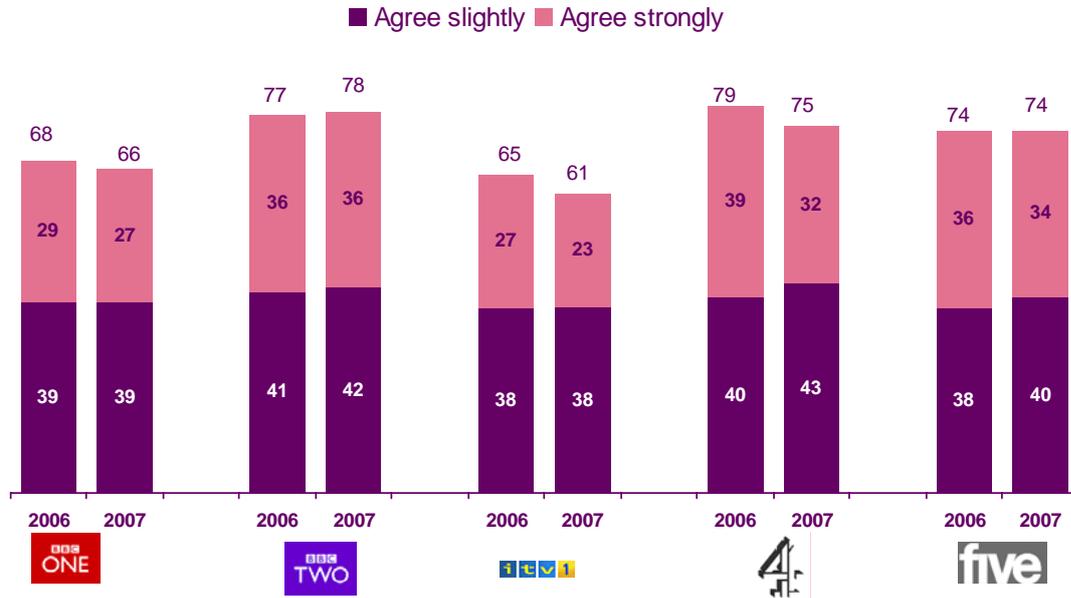
In the Pulse survey, which asks people their opinions of particular programmes, respondents were asked whether they agreed or disagreed with the following statement relating to innovation:

This programme felt original and different from most other TV programmes I've seen

The aggregated responses show that the majority of programmes watched across all channels were considered 'original and different', although there was some variation between broadcasters. In 2006, Channel 4's programmes were most likely to be seen as original and different. However, in 2007 BBC Two was rated more positively on this. In 2007, BBC Two, Channel 4 and Five are still more likely to have their programmes rated as original and different than BBC One and ITV1.

Figure 8.9: Innovation: Pulse audience opinions

'This programme felt original and different from most other TV programmes I've seen'



Base for all responses to programmes watched by Pulse respondents

Responses: BBC One 1692586, BBC Two 548246, ITV1 1291876, Channel 4 681975, Five 329753. 2007, BBC One 1338840, BBC Two 372248, ITV1 1160021, Channel 4 358108, Five 273761

Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006, Jan-Dec 2007

Challenging - It shows programmes that make me stop and think

Audience impact

Challenging programmes

Figure 8.10 shows regular viewers' opinions about the extent to which channels show 'programmes that make me stop and think'. Almost half of all UK viewers rate the main PSB channels together as providing this type of challenging content.

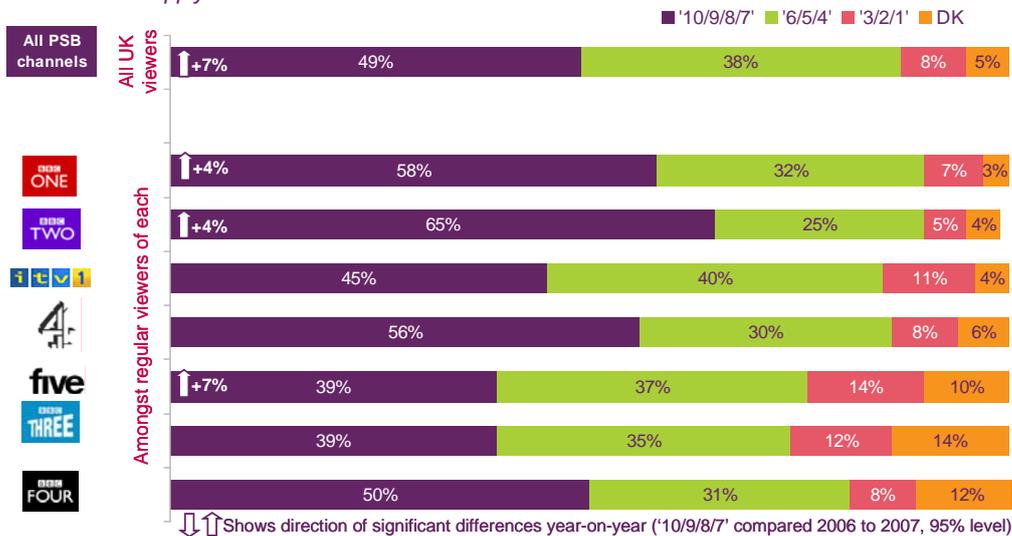
As in 2006, BBC Two, BBC One and Channel 4 are mostly seen by regular viewers to be showing challenging programmes (65%, 58% and 56% respectively). ITV1 (45%) and Five (39%) are less likely to be seen to be showing programmes that made people stop and think.

Younger viewers are more likely to see PSB channels as having challenging content, with 57% of 16-24 year olds rating PSB channels high in this area. Older people are less likely to rate the channels as showing challenging content, and this was particularly the case with Channel 4. Regular viewers in the AB socio-economic group are more likely to say that BBC Two and Channel 4 show challenging content; less so for ITV1.

Figure 8.10: Challenging: audience views

It shows programmes that make me stop and think

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



Base for 'all PSB channels': All respondents, 7157
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)
 BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287

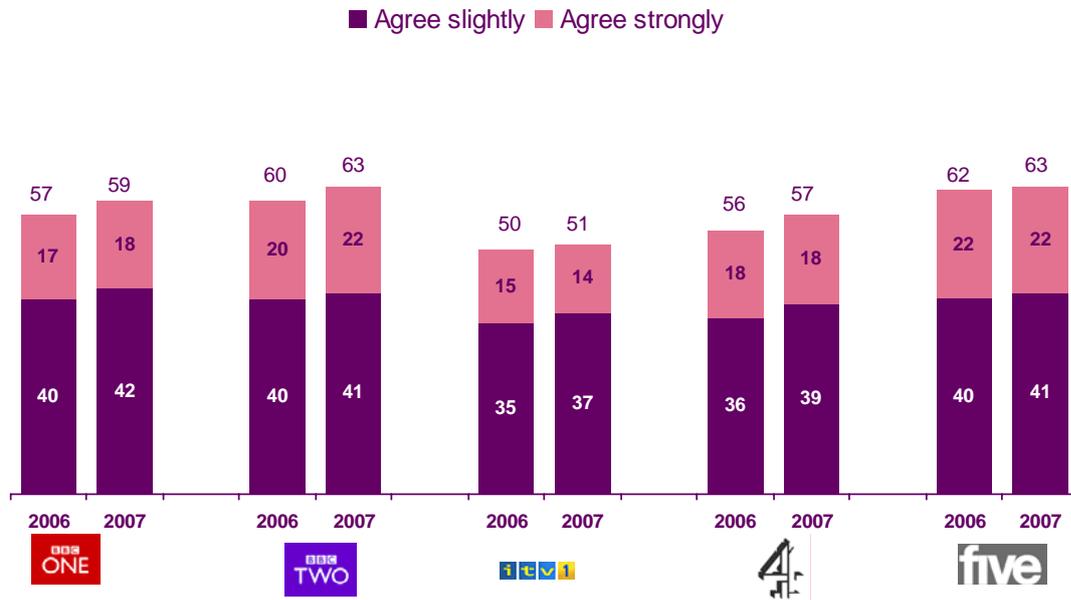
In relation to challenging content, Pulse respondents were asked whether they agreed with the statement

'This programme was thought-provoking'.

For the programmes watched on the main five channels, more than half the aggregated ratings showed that the programme had been thought-provoking. In both 2006 and 2007 this was most common among responses to programmes on Five and BBC Two, in 2007 both channels had 63% of responses in agreement. ITV1 continues to gain the lowest number of positive responses for *'thought-provoking'*.

Figure 8.11: Challenging: Pulse audience opinions

'This programme was thought-provoking'



Base for all responses to programmes watched by Pulse respondents
 Responses: BBC One 1692586, BBC Two 548246, ITV1 1291876, Channel 4 681975, Five 329753. 2007, BBC One 1338840, BBC Two 372248, ITV1 1160021, Channel 4 358108, Five 273761
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006, Jan-Dec 2007

Engaging – programmes I want to watch, programmes that reflect the interests and concerns of people like me

'Engaging' in this context means the provision of programming that is accessible and attractive to viewers.

Viewing figures

The top 15 programmes viewed on each channel during 2006 are listed below, to provide an illustration of the types of *engaging* content that PSB broadcasters provide.

Analysis of this data shows that all of BBC One's top 15 programmes, the top 14 programmes watched on ITV1 and a *Celebrity Big Brother* programme shown on Channel 4 comprised the top 30 programmes watched across *any* of the PSB channels. Programmes in the top 30 programmes across the channels were most likely to fall into the category of Entertainment (43%) or Drama Series/Serials (20%).

The top programmes on BBC One and ITV1 were dominated by Entertainment and Drama programmes, while the top programmes on BBC Two and Channel 4 often fell into the Documentaries and Hobbies/Leisure genres. Five's list of most viewed programmes contained more Films than any of the other PSB channels (7 out of 15). The top programmes watched on BBC Three tended to be Drama, either Soaps or Series/Serials, and Documentaries. BBC Four's top programmes were more varied in terms of their genres and BBC Four the only channel to feature Music and Arts programmes within the list of the most viewed programmes.

Figure 8.12: Top 15 programmes by audience size, by channel for 2007**BBC One**

	Date	Day	Start time	Duration	Genre	000s
EASTENDERS	25/12/2007	Tuesday	20:03:53	00:30:22	Drama:Soaps	14382
DOCTOR WHO	25/12/2007	Tuesday	18:50:40	01:11:52	Drama:Series/Serials	13310
THE VICAR OF DIBLEY	01/01/2007	Monday	21:33:28	00:55:13	Entertainment	13082
CONCERT FOR DIANA	01/07/2007	Sunday	20:10:35	02:19:11	Entertainment	12217
STRICTLY COME DANCING	22/12/2007	Saturday	21:27:36	00:47:22	Entertainment	12090
MATCH OF THE DAY	21/11/2007	Wednesday	19:30:05	02:31:32	Sport	11194
SIX O'CLOCK NEWS	25/12/2007	Tuesday	18:05:00	00:10:30	News/Weather	10475
TO THE MANOR BORN	25/12/2007	Tuesday	21:35:35	00:55:45	Entertainment	10255
COMIC RELIEF - THE BIG ONE	16/03/2007	Friday	18:59:56	02:58:59	Entertainment	9734
CHILDREN IN NEED	16/11/2007	Friday	19:00:00	03:00:12	Entertainment	9557
WAKING THE DEAD	07/01/2007	Sunday	21:01:24	00:57:51	Drama:Series/Serials	9506
FILM: SHREK 2 (2004)	25/12/2007	Tuesday	16:41:13	01:21:41	Films:Cinema	9361
NEW TRICKS	25/12/2007	Monday	21:01:25	00:58:47	Drama:Series/Serials	9251
BBC NEWS	01/07/2007	Sunday	22:30:00	00:17:56	News/Weather	9239
THE EUROVISION SONG CONTEST	12/05/2007	Saturday	20:00:03	03:12:29	Entertainment	8765

BBC Two

	Date	Day	Start time	Duration	Genre	000s
TOP GEAR	02/12/2007	Sunday	20:01:50	00:59:20	Hobbies/Leisure	8351
TOP GEAR OF THE POPS	16/03/2007	Friday	21:59:31	00:32:54	Hobbies/Leisure	6403
MASTERCHEF GOES LARGE	15/03/2007	Thursday	20:01:22	00:58:43	Hobbies/Leisure	5234
QI	16/11/2007	Friday	22:00:13	00:29:03	Entertainment	4754
TOP GEAR - POLAR SPECIAL	25/07/2007	Wednesday	19:59:03	01:02:03	Hobbies/Leisure	4724
HEROES	25/07/2007	Wednesday	21:01:49	00:41:07	Drama:Series/Serials	4539
RICHARD HAMMOND MEETS EVEL KNIIEVEL	23/12/2007	Sunday	21:02:35	00:59:00	Documentaries	4467
LOUIS THEROUX: THE MOST HATED FAMILY IN COAST	01/04/2007	Sunday	21:01:05	00:58:36	Documentaries	4380
COAST	10/06/2007	Sunday	20:30:55	00:59:00	Documentaries	4353
LONG WAY DOWN	04/11/2007	Sunday	21:01:55	00:59:27	Documentaries	4329
CRUFTS 2007	11/03/2007	Sunday	18:59:40	01:59:53	Entertainment	4248
THE APPRENTICE: YOU'RE HIRED	13/06/2007	Wednesday	22:00:32	00:31:04	Documentaries	4220
AUTUMNWATCH	05/11/2007	Monday	20:02:30	00:59:02	Documentaries	4020
9/11: THE CONSPIRACY FILES	18/02/2007	Sunday	21:00:54	00:59:02	Current Affairs	3944
SPRINGWATCH	28/05/2007	Monday	20:01:35	00:59:00	Hobbies/Leisure	3941

ITV1

	Date	Day	Start time	Duration	Genre	000s
RUGBY WORLD CUP 2007	20/10/2007	Saturday	19:29:20	02:45:30	Sport	13125
CORONATION STREET	15/01/2007	Monday	20:30:10	00:25:57	Drama:Soaps	13083
THE X FACTOR RESULTS	15/12/2007	Saturday	21:36:45	01:06:20	Entertainment	12230
THE X FACTOR	15/12/2007	Saturday	19:14:15	01:34:25	Entertainment	11779
BRITAIN'S GOT TALENT	17/06/2007	Sunday	20:00:50	01:04:20	Entertainment	11576
DOC MARTIN	05/11/2007	Monday	21:01:20	00:59:25	Drama:Series/Serials	10375
DANCING ON ICE	17/03/2007	Saturday	18:29:15	01:16:12	Entertainment	10035
EMMERDALE	08/01/2007	Monday	19:02:55	00:26:33	Drama:Soaps	9384
UEFA CHAMPIONS LEAGUE	01/05/2007	Tuesday	19:30:00	03:12:10	Sport	9286
I'M A CELEBRITY - GET ME OUT OF HERE!	12/11/2007	Monday	21:00:45	01:26:15	Documentaries	9159
DANCING ON ICE - THE SKATE OFF	17/03/2007	Saturday	20:50:45	00:46:28	Entertainment	9145
WILD AT HEART	14/01/2007	Sunday	19:59:25	00:58:40	Drama:Series/Serials	9005
PARKINSON	16/12/2007	Sunday	21:03:45	01:56:15	Entertainment	8934
LEWIS	04/03/2007	Sunday	21:05:15	01:54:14	Drama:Series/Serials	8848
THE QUEEN	02/09/2007	Sunday	21:05:15	01:48:27	Films:Cinema	8723

Channel 4

	Date	Day	Start time	Duration	Genre	000s
CELEBRITY BIG BROTHER	19/01/2007	Friday	22:32:40	00:28:02	Documentaries	8781
BIG BROTHER	30/05/2007	Wednesday	21:02:00	01:14:04	Documentaries	6589
GRAND DESIGNS	28/02/2007	Wednesday	21:03:06	01:29:57	Hobbies/Leisure	5763
FILM: ELF (2003)	02/12/2007	Sunday	17:49:05	01:36:19	Films:Cinema	5420
UGLY BETTY	19/01/2007	Friday	21:33:24	00:53:23	Entertainment	5271
LOCATION, LOCATION, LOCATION	27/06/2007	Wednesday	19:59:56	00:57:40	Hobbies/Leisure	4880
RAMSAY'S KITCHEN NIGHTMARES	11/12/2007	Tuesday	21:00:59	01:00:09	Documentaries	4649
GORDON RAMSEY'S F WORD	19/06/2007	Tuesday	21:00:49	01:00:14	Hobbies/Leisure	4500
THE SMALLEST PEOPLE IN THE WORLD	29/01/2007	Monday	20:59:56	00:59:59	Documentaries	4338
DEAL OR NO DEAL	01/01/2007	Monday	17:17:46	00:43:55	Entertainment	4326
FILM: THE DAY AFTER TOMORROW (2004)	11/02/2007	Sunday	20:02:28	02:10:36	Films:Cinema	4318
RELOCATION, RELOCATION	24/01/2007	Wednesday	20:01:02	00:58:09	Hobbies/Leisure	4318
DIANA: THE WITNESSES IN THE TUNNEL	06/06/2007	Wednesday	21:02:20	00:57:22	Documentaries	4109
8 OUT OF 10 CATS	13/07/2007	Friday	21:31:02	00:27:57	Entertainment	4012
SHAMELESS	09/01/2007	Tuesday	22:02:40	01:00:10	Drama:Series/Serials	3996

Five

	Date	Day	Start time	Duration	Genre	000s
CSI: CRIME SCENE INVESTIGATION	03/07/2007	Tuesday	21:01:10	00:55:31	Drama:Series/Serials	4174
FILM: MATILDA (1996)	18/11/2007	Sunday	17:01:05	01:43:44	Films:Cinema	3522
CSI MIAMI	02/01/2007	Tuesday	21:01:06	00:55:45	Drama:Series/Serials	3509
FILM: DIRTY DANCING	21/10/2007	Sunday	20:55:10	00:59:33	Films:Cinema	3360
EXTRAORDINARY PEOPLE: THE TWINS...	19/02/2007	Monday	20:57:55	00:58:09	Documentaries	3289
CSI - NEW YORK	30/06/2007	Saturday	21:01:35	00:54:06	Drama:Series/Serials	3088
HOUSE	29/03/2007	Thursday	21:02:16	00:55:00	Drama:Series/Serials	2972
FILM: SPIDER-MAN 2 (2004)	08/04/2007	Sunday	18:28:02	01:29:02	Films:Cinema	2938
FILM: GHOST	04/11/2007	Sunday	21:59:20	01:27:00	Films:Cinema	2686
FILM: TERMINATOR 3: RISE OF THE MACHINES	14/01/2007	Sunday	22:02:20	01:01:13	Films:Cinema	2649
UEFA CUP: NEWCASTLE V AZ ALKMAAR	08/03/2007	Thursday	19:15:02	02:08:26	Sport	2519
NCIS	07/12/2007	Friday	21:01:55	00:55:05	Drama:Series/Serials	2505
FILM: HELLBOY (2004)	23/09/2007	Sunday	20:56:53	01:16:36	Films:Cinema	2458
BAD BOYS 2	02/12/2007	Sunday	21:00:04	00:49:31	Films:Cinema	2395
UEFA CUP: ANDERLECHT V TOTTENHAM	06/12/2007	Thursday	19:31:15	02:24:20	Sport	2327

BBC Three

	Date	Day	Start time	Duration	Genre	000s
EASTENDERS	17/05/2007	Thursday	22:00:13	00:29:04	Drama:Soaps	1447
HEROES	14/11/2007	Wednesday	22:03:23	00:41:15	Drama:Series/Serials	1440
FILM: SHREK	19/06/2007	Tuesday	20:00:34	01:20:58	Films:Cinema	1432
MATCH OF THE DAY SPECIAL	13/03/2007	Tuesday	20:57:31	01:01:43	Sport	1364
TORCHWOOD	01/01/2007	Monday	21:30:10	01:33:15	Drama:Series/Serials	1232
DOCTOR WHO	22/04/2007	Sunday	20:00:03	00:46:52	Drama:Series/Serials	1130
DOCTOR WHO CONFIDENTIAL	30/06/2007	Saturday	19:57:05	00:43:14	Documentaries	1017
SPOOKS	16/10/2007	Tuesday	22:29:25	00:59:08	Drama:Series/Serials	998
FILM: SHREK THE HALLS	27/12/2007	Thursday	20:03:45	00:20:38	Entertainment	963
MY BIG BREASTS AND ME	05/04/2007	Thursday	21:00:00	00:56:29	Documentaries	946
THE MIGHTY BOOSH	06/12/2007	Thursday	22:28:57	00:28:32	Entertainment	926
FILM: MEN IN BLACK	25/03/2007	Sunday	19:31:03	01:28:41	Films:Cinema	881
EASTENDERS FEUDS: THE BEALS V THE MITCHE	18/05/2007	Friday	20:30:06	00:42:59	Documentaries	871
MOST ANNOYING POP SONGS...WE LOVE TO HAT	31/03/2007	Saturday	23:10:04	01:13:33	Documentaries	834
EASTENDERS SWEETHEARTS	02/02/2007	Friday	20:29:49	00:58:00	Documentaries	829

BBC Four

	Date	Day	Start time	Duration	Genre	000s
FANNY HILL	22/10/2007	Monday	21:02:33	00:57:34	Drama:Series/Serials	1175
LIFE ON MARS	20/02/2007	Tuesday	22:00:35	00:57:14	Drama:Series/Serials	831
BLACKADDER BACK AND FORTH	17/08/2007	Friday	22:36:29	00:29:18	Entertainment	800
QI	23/11/2007	Friday	22:29:36	00:28:56	Entertainment	770
MISS MARIE LLOYD - QUEEN OF THE MUSIC HA	09/05/2007	Wednesday	21:00:54	01:19:04	Music	759
STEPHEN FRY: 50 NOT OUT	17/08/2007	Friday	21:02:30	00:58:36	Arts	652
BOMBAY RAILWAY	18/07/2007	Wednesday	21:01:05	00:59:24	Documentaries	555
EDWARDIAN SUPERSIZE ME	16/04/2007	Monday	21:00:14	00:58:56	Hobbies/Leisure	547
A BIT OF FRY & LAURIE	17/08/2007	Friday	22:03:45	00:29:03	Entertainment	547
THE YOUNG ONES	17/08/2007	Friday	23:08:52	00:29:14	Entertainment	541
WAINWRIGHT WALKS	19/08/2007	Sunday	22:02:47	00:29:00	Documentaries	535
THE SECRET LIFE OF THE MOTORWAY	21/08/2007	Tuesday	21:00:18	00:59:07	Documentaries	517
MICHAEL PALIN'S NEW EUROPE	19/09/2007	Wednesday	20:00:20	00:58:51	Hobbies/Leisure	487
THE GENIUS OF PHOTOGRAPHY	01/11/2007	Thursday	21:01:33	00:59:10	Arts	478
COMICS BRITANNIA	10/09/2007	Monday	21:00:21	00:58:42	Documentaries	474

Audience impact

The PSB Tracker asked regular viewers for their opinions on two statements relating to this PSB characteristic.

'It shows programmes I want to watch'

'Its programmes reflect the interests and concerns of people like me'

Engaging programmes – 'programmes I want to watch'

As seen in 2006, around half of all viewers felt that the PSB channels taken together, were providing them with programmes they wanted to watch, rating them 7-10 out of 10.

Sixty-four per cent of BBC One and BBC Two regular viewers gave them a rating of 7-10 out of 10 in relation to having programmes they wanted to watch. Half of Five's regular viewers felt it showed programmes they wanted to watch; section 12 shows more clearly that this is the PSB element that Five is seen to be performing most strongly upon, up 8% on last year.

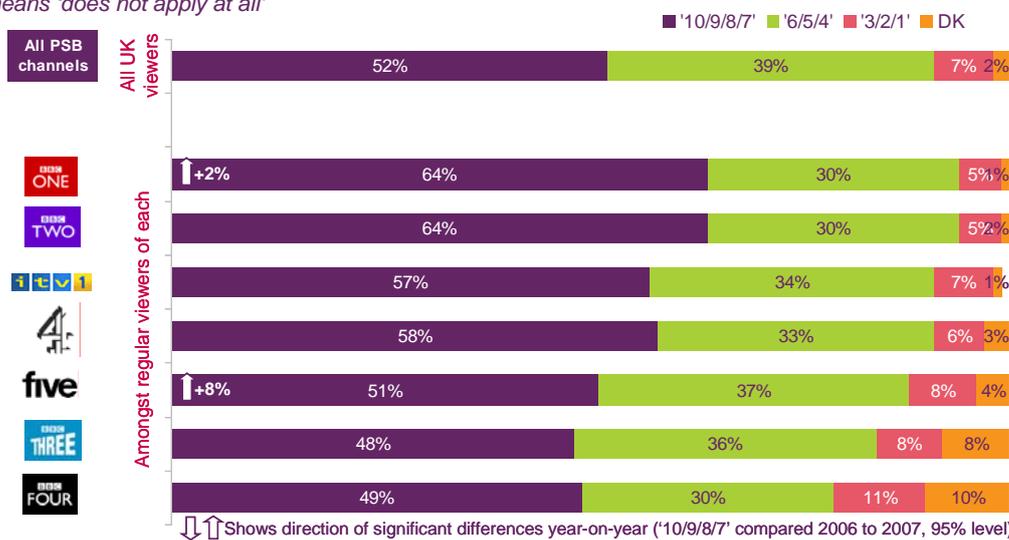
Channel 4's younger regular viewers felt particularly strongly about how engaging the channel's content is – 77% of its 16-24 regular viewers rated it positively. Seven in ten regular viewers from ethnic minority groups also rated Channel 4 well in this area.

For the main five channels, women were more likely to feel satisfied with the programmes available than men, particularly on BBC One and ITV1.

Figure 8.13: Engaging: audience opinions, programmes I want to watch

It shows programmes I want to watch

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



Base for 'all PSB channels': All respondents, 7192 (amalgamated data: Jan 07, April 07, July 07, Oct 07) Base for individual channels: Self-reported regular viewers of each channel
 BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287

Reflecting interests and concerns

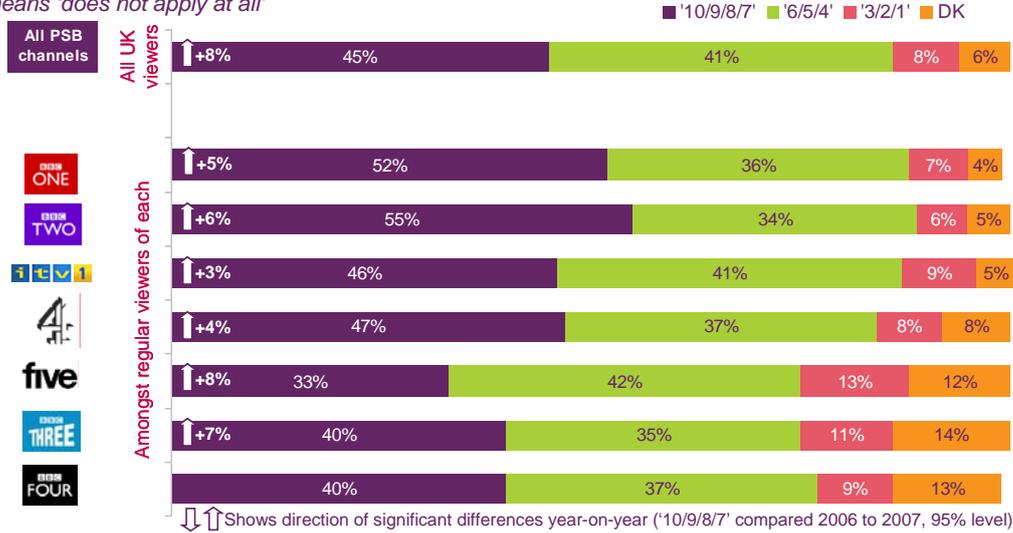
Figure 8.14 looks at whether viewers felt that the channels reflected their own interests and concerns. This shows that taken overall, 45% felt that the PSB channels reflected their interests. Of the PSB channels, BBC Two (55%) and BBC One (52%) were most likely to be seen to reflect the interests and concerns of their regular viewers, with ITV1 and Channel 4 receiving similar levels of positive opinion in this area.

Forty-seven per cent of Channel 4's regular viewers felt that the channel reflected their concerns and interests, although there was stronger agreement among its younger viewers—59% of its 16-24 viewers said that its programmes reflected their interests.

Figure 8.14: Engaging: audience opinions, reflects the interests and concerns of people like me

Its programmes reflect the interests and concerns of people like me

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287

Section 9

Children's PSB

Introduction

This section looks in detail at Children's PSB. This includes details about Children's genre output, viewing of Children's programming and viewing by children more generally, as well as parents' perceptions of Children's programming and PSB.

Summary findings

Output hours

- The downward trend in the total volume of Children's programmes broadcast by BBC One, ITV1, Five and Channel 4 continued in 2007, with significantly fewer hours of Children's output being shown on these channels in 2007 (2,576 hours) in comparison to 2003 (3,787 hours). However, in 2007 a higher volume of programmes was shown on BBC Two, CBBC and CBeebies.
- In the last five years there has been a fall in the volume of first-run originated Children's programming available across the PSB channels taken together:
 - ITV1's first-run originated Children's output decreased from 158 to 106 hours reflecting ITV1's strategy of shifting Children's programming from weekday afternoons to other parts of the schedule.
 - The BBC increased investment in first-run originated Children's programming in real terms, however its volume decreased from 1,276 in 2006 to 803 hours in 2007. This was partly due to changes in the BBC's commissioning strategy (to produce fewer but better programmes). There were also changes in scheduling in 2007 which meant that programmes were no longer broadcast simultaneously across channels and were therefore no longer counted as first-run originations on each channel.
- As a proportion of total Children's hours, first-run originated productions had halved to 8% by 2007, from 16% in 2003, while repeats (which includes repeats of acquired programmes) rose from 58% to 89% in the same period.

Viewing figures

- The volume of children's weekly viewing hours of Children's programming increased in 2007 (back to the level seen in 2005 or 4.9 hours a week on average).
- The long-term increase in viewing of children's programming on commercial multichannels, seen between 2003 and 2006 in all homes, was reversed in 2007. The proportion of children's programming watched on commercial multichannels decreased from 61% in 2006 to 58% in 2007 (although this is still high in comparison to the 46% share in 2003), while viewing of Children's programming on the BBC digital channels increased (from 21% to 24% share of children's programming) at the expense of the commercial multichannels.

- This overall trend is underpinned by the fact that from 2006 to 2007 children's viewing of the Children's genre on the BBC digital channels increased in multichannel households. Total annual hours of viewing of CBeebies increased from 29 hours on average in 2006 to 32 hours, while hours viewed on CBBC grew from 24 hours to 30 hours in the last year.

Audience impact

- The PSB Tracker found that children's PSB is seen as important by parents of children of all ages, with 75% or over agreeing so. However, there is a relatively large gap between the importance placed on this by parents and the proportion of parents that see the PSB channels together as performing well on this PSB remit.
- Of the main five PSB channels, BBC One is most likely to be seen to provide high quality UK-made children's programmes, with 57% responding positively, more so in fact than the PSB channels together. BBC Two, ITV1 and Five are rated similarly by parents, with 38% to 41% rating the channels positively on this aspect. Channel 4 contributes to this PSB element to a lesser degree, with 18% rating the channel positively. BBC One and ITV1 are rated more positively by parents of over-5 year olds than pre-school children while parents of pre-school children tend to rate BBC Two and Five more positively than parents of the older age groups.
- The Children's PSB survey found that BBC One, BBC Two, CBeebies and CBBC in particular are seen by parents to be delivering well against many of the elements of the PSB purposes and characteristics. The quality of the children's programmes on ITV1 and Five were appreciated and Five's programmes were also seen as having new ideas and different approaches and being programmes that children want to watch.

Background

Children's programming on the main five channels is made up of a range of genres, including Drama, Factual programmes, Entertainment, Animation and Pre-school programming. Each of the channels maintains a different mix. Dedicated children's channels are now available from the PSB broadcasters and commercial broadcasters via digital TV.

On the main PSB channels, of BBC One and BBC Two, the latter shows more hours of Children's programming and its focus tends to be the younger age group. ITV1 and BBC have historically together accounted for a significant proportion of all original UK-produced programming, but the landscape is changing and Children's programming, including original UK output, has been decreasing on ITV1. Five is a significant PSB provider of children's programmes, serving younger children in particular via its *Milkshake* strand. Channel 4's obligations are in schools' rather than general children's programmes.

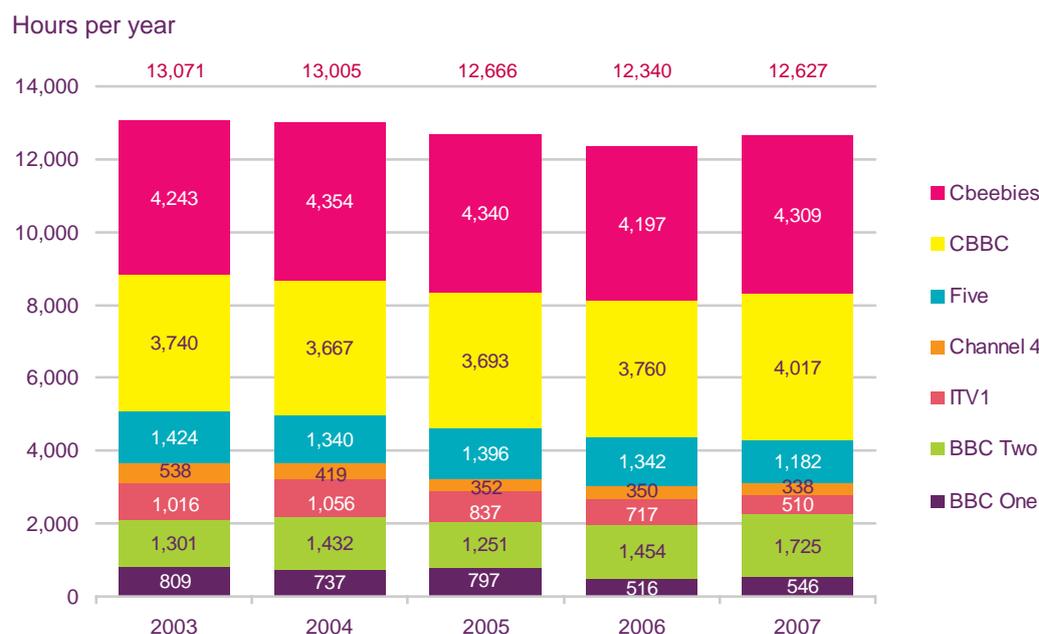
This chapter looks at Children's PSB programming in terms of output hours, viewing figures and parents' opinions, for BBC One, BBC Two, ITV1, Channel 4, Five, CBeebies and CBBC. CBBC and CBeebies were not asked about in the PSB tracker in 2007, instead data collected in the Children's PSB survey for *The Future of Children's Television Programming* consultation published in October 2007 is included to show audience opinions of these channels.

Output hours⁴³

Figure 9.1 shows that the downward trend in the total volume of Children's programmes broadcast by BBC One, ITV1, Five and Channel 4 continued in 2007, with significantly fewer hours of Children's output being shown on the three channels in 2007 (2,576) than in 2003 (3,787).

However, in 2007 a higher volume of programmes falling within the Children's genre was shown on BBC Two, CBBC and CBeebies.

Figure 9.1: Children's PSB output, 2003 - 2007



Source: Broadcaster returns

Figure 9.2 shows the hours of first-run originated Children's PSB output on the PSB channels. Five's level of output remained stable in 2007 from 2006 (at around 150 hours), but ITV1's first-run UK originations fell for the fifth consecutive year from 158 hours in 2006 to 106 hours in 2007. This reflects ITV1's strategy of shifting Children's programming from weekday afternoons to other parts of the schedule.

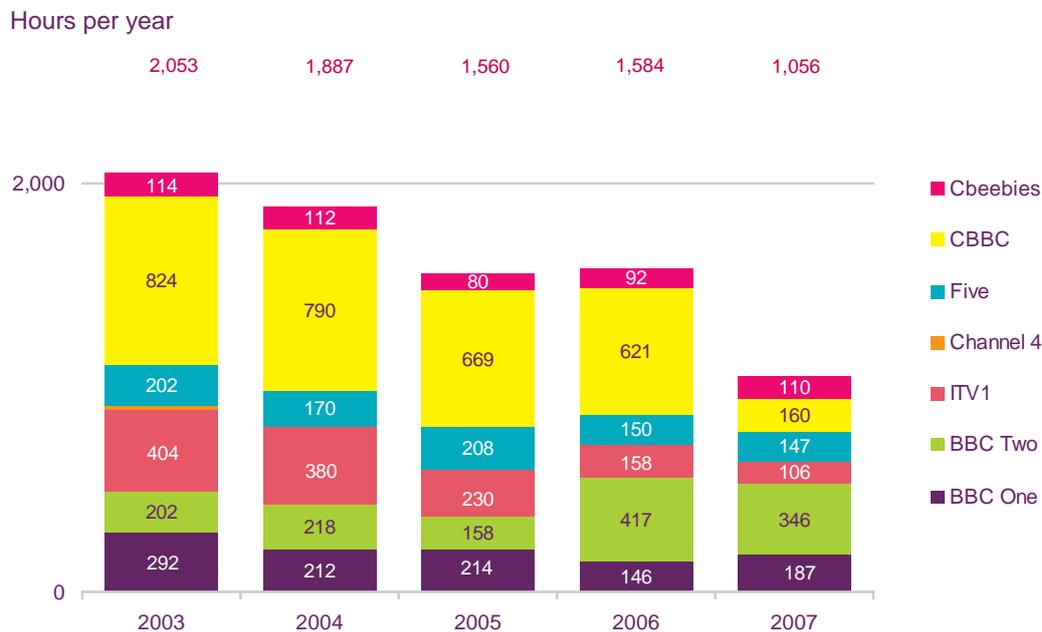
The BBC increased investment in first-run originated Children's programming (from £66m in 2006 to £70m in 2007 in real terms⁴⁴), however the BBC channels together showed 803 hours of first-run originated Children's programming in 2007, a decrease of 37% from the 1,276 hours in 2006. This decrease was particularly noticeable for CBBC (from 621 in 2006 to 160 hours in 2007) and was partly due to changes in the BBC's commissioning strategy which reduced the numbers of long-running, low cost shows such as *Level Up* which accounted for many hours of output. The change was designed to produce fewer but better programmes. There were also changes in scheduling in 2007 which meant that

⁴³ NB The genre of Children's programming is not the only genre shown on the BBC's digital children's channels, e.g. programmes classified at Education as also shown.

⁴⁴ Source: Broadcaster returns: See *Ofcom's Second Public Service Broadcasting Review (Phase One: The Digital Opportunity)*

programmes were no longer broadcast simultaneously across channels and were therefore no longer counted as first-run originations on each channel⁴⁵.

Figure 9.2 Hours of first-run originated Children's PSB output on individual channels, 2003 – 2007



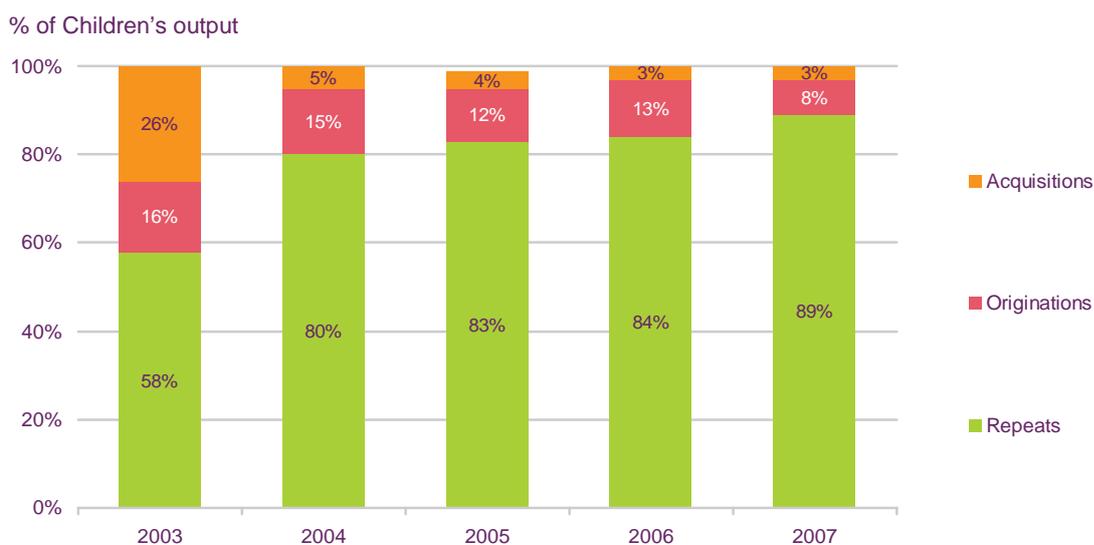
Source: Broadcaster returns

As a proportion of total children's hours, first-run original productions had halved to 8% by 2007, from 16% in 2003, while repeats (including repeats of acquired programmes) rose from 58% to 89% in the same period⁴⁶.

⁴⁵ In 2006, there were 331 hours of first-run originated children's output that was simultaneously broadcast on more than one channel.

⁴⁶ Repetition of children's programming also provides some educational benefits. It is less of an issue than for adults' programming, as every few years the cohort watching changes.

Figure 9.3: Overview of the hours of originated Children’s PSB output, 2003 – 2007



Source: Broadcaster returns

Viewing figures

In the long-term there has been a slight decrease in the weekly viewing hours (of any type of programme) by children from 2003 to 2007, from 17.2 total hours per week to 15.5 hours, although the amount of weekly viewing hours remained stable from 2006 to 2007.

As the previous PSB Annual Report noted, multichannel television has affected children’s viewing habits. Since 2003 the proportion of viewing by children (individuals aged 4-15 as defined by BARB) of channels other than the main five channels has been growing; for commercial multichannels this now stands at 48%⁴⁷ (see figure 9.4).

Alongside this growth there has also been a long-term decline in the proportion of viewing hours for the main five channels, from 61% of viewing in 2003 to 43% in 2007. In particular, between 2006 and 2007 there has been an increase in the proportion of viewing hours of the BBC digital channels (7% to 9%) at the expense of ITV1, Channel 4 and Five.

⁴⁷ These figures relate to all types of programmes viewed by children; not solely their viewing of children’s output.

Figure 9.4: Children’s total weekly viewing by channel type, 2003 - 2007



Source: BARB 2003-2007, all children 4-15

With regard to viewing of Children’s programming exclusively, Figure 9.5 shows that viewing of this genre across all channels in 2007 increased back to the level seen in 2005 (4.9 hours per week).

The long-term increase between 2003 and 2006 in viewing of commercial multichannels has not continued in 2007. In fact, the proportion of children’s programming watched on commercial multichannels has decreased; from 61% in 2006 to 58% in 2007. Viewing of the main five channels has, in fact, been stable over this period; viewing of Children’s programming on the BBC digital channels has increased from 21% to 24%, at the expense of the commercial multichannels.

In 2007, while 43% of total children’s viewing was of the main five channels (see Figure 9.3 above), only 18% of viewing of Children’s programmes was of the same channels.

Figure 9.5: Children’s weekly viewing of Children’s genre, by channel type, 2003 - 2007

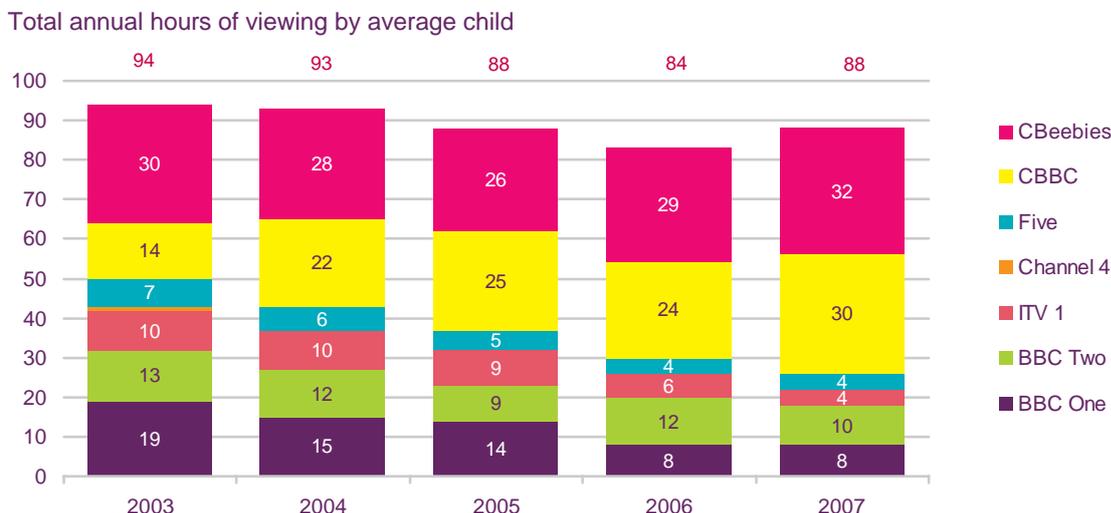


Source: BARB 2003-2007, all children 4-15

Between 2003 and 2007, yearly viewing by 4-15 year olds in multichannel households of the Children’s genre on the main five channels declined substantially (from 50 hours per child to 26 hours) (Figure 9.6). This reduction in viewing hours was most significant for BBC One and ITV1, which in 2006 stood at around half of their 2003 levels.

However, in 2007 there was an increase in viewing of the BBC digital children’s channels, in particular CBBC. Hours of viewing of CBeebies increased from 29 hours in 2006 to 32 hours, while hours viewed on CBBC grew from 24 hours to 30 hours in the last year.

Figure 9.6: Children’s viewing hours of Children’s genre on PSB channels in multichannel households, 2003 - 2007



Source: BARB 2003-2007, all children 4-15 in multichannel homes, Children’s genre only

Figure 9.7 shows the proportion of children’s viewing by genre across the entire day on the main PSB channels. Although there was a decrease in the proportion of viewing of the Children’s genre, from 19% in 2003 to 12% in 2006, this has remained static at 12% in 2007. In general the overall profile of viewing different genres has remained similar from 2006 to 2007, with the largest proportion of children’s viewing on the main five channels being Entertainment programmes at 21%. Other Factual and Soaps had the next largest shares, at 14% each.

Figure 9.7: Children’s viewing, by genre, across the main five channels, 2003-2007

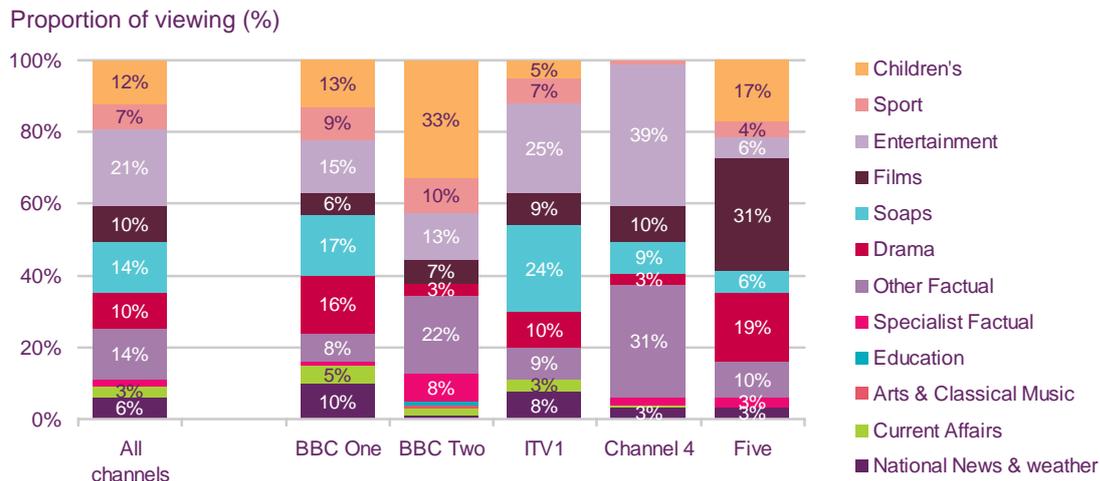


Source: BARB 2003-2007, Network, five main PSB channels only, all children 4-15, all time (0600-3000)

Figure 9.8 breaks down children’s viewing by genre in 2006, on the main five channels. Children’s programming is most likely to be watched on BBC Two, perhaps unsurprisingly, as BBC Two, out of the main PSB channels, carries the largest amount of children’s output.

The genres with the largest proportions of viewing on ITV1 were Entertainment (25%) and Soaps (24%), together accounting for almost half of children's viewing on this channel. Children's viewing of Five is characterised by a greater proportion of watching Films (31%) alongside considerable viewing of Specialist Factual (19%) and Children's programming (17%). In comparison, children's viewing of BBC One is much more diverse, with no particular genre dominating viewing. Viewing by children on Channel 4 is dominated by Entertainment (39%) and Other Factual (31%).

Figure 9.8: Children's viewing by genre across the main five channels, 2007



Source: BARB 2007, Network, five main PSB channels only, all children 4-15, all time (0600-3000)

Audience impact

PSB Tracker research

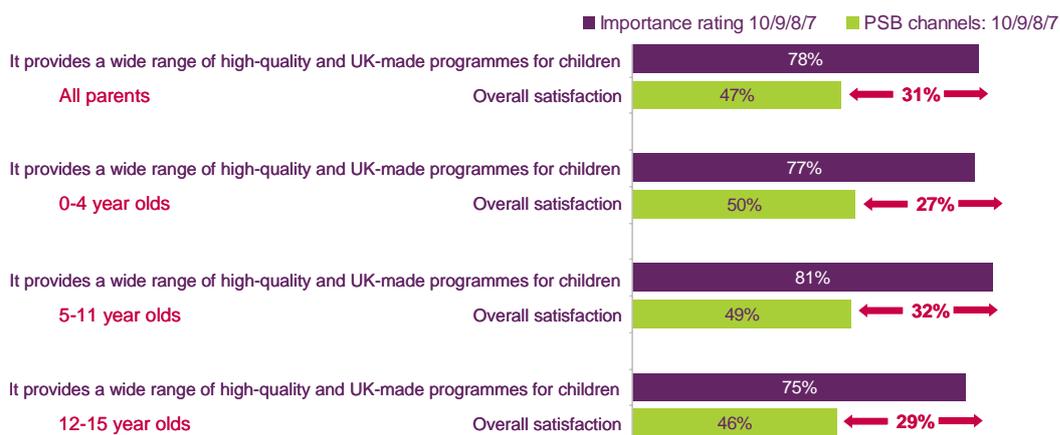
Parents were asked in the 2007 PSB Tracker about their opinions of Children's programming at a general level. Parents or guardians of children aged under 16 were asked how important it was that the PSB channels provided a 'range of high quality and UK-made programmes for children' and were asked to rate the PSB channels their child regularly watched against this⁴⁸. They were asked to evaluate the main five channels; CBBC and CBeebies were not asked about in this research.

The importance and delivery of PSB in children's programming

Figure 9.9 shows the importance that parents of differently- aged children ascribed to the PSB channels providing 'a wide range of high quality and UK-made programmes for children' and how well the PSB channels together achieved this. It is clear that parents of children of all ages agree that having good quality and UK-made programmes is important, with between 75% and 81% agreeing. It is interesting to note that approximately the same proportion of the parents of the differently-aged children see the *PSB channels together* as providing this; around half (47%) of all parents see the PSB channels as delivering this PSB remit well.

⁴⁸ In 2006 a separate survey was carried out alongside the Tracker, in which the PSB purposes and characteristics were translated into *nine* statements relevant to children's programming, for parents to rate each channel on. The 2007 and 2006 data sets are not comparable, therefore only selected data from 2006 have been included in this report.

Figure 9.9: Importance of PSB statements, compared with satisfaction, for parents



•Extent to which the characteristics is important, where 10 means "extremely important" and 1 means "not at all important"
 •Extent to which the characteristic applies to the channels together, where 10 means 'applies completely' and 1 means 'does not apply at all'
 Base = All respondents who are parents/carers of children in household. Amalgamated data: July 07, Oct 07.
 All Channels Combined: All parents (949); 0-4 (387); 5-11 (526); 12-15 (370). Importance: All parents (703); 0-4 (288); 5-11 (390); 12-15 (273).
 †Note: Statement about children's TV programming only asked of parents/carers of children in household

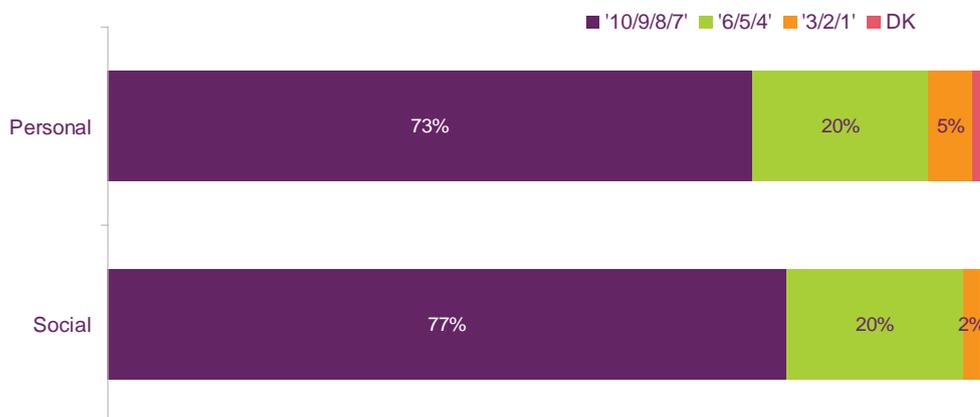
A sub-set of parents in October 2007 were also asked to rate 'having good quality and UK-made children's programmes' in terms of both personal importance and societal importance. Figure 9.10 clearly shows that for parents, children's programming is seen as being key, both personally and for society, with 73% and 77% respectively agreeing with this statement.

Figure 9.10: Importance of PSB statements to parents; general, social or personal

How important it is to you *personally* that these TV channels do this?

How important do you think it is to *society as a whole* that these TV channels do this?

It provides a wide range of high-quality and UK-made programmes for children



⇕⇑ Shows direction of any significant differences between Importance ratings (95% level)
 Base (Oct 07) = all respondents who are parents/carers of children in household:
 Personal Importance (246); Social Importance (246)

The 2006 research with parents, rather than focusing on PSB in terms of general, personal and societal importance, focused on a set of statements about more *specific* elements of PSB, with specific reference to children's programming. The most relevant data from this research showed that around three-quarters (76%) of parents said that it was important that the PSB channels have *well-made, high quality programmes* and just under two-thirds (62%) of parents thought it was important to have *enough programmes made in the UK for my child to watch*.

Contribution of individual PSB channels to the delivery of PSB in children's programming

Figure 9.11, below, shows to what extent parents see *individual* channels as offering well-made, high quality UK-made programmes for children. Parents were only asked to comment about individual channels if they also claimed to be a regular viewer of the channel, to ensure that we received informed opinions.

BBC One was most likely to be seen as providing good quality UK-made children's programmes, with 57% responding positively, more so in fact than the PSB channels together. BBC Two, ITV1 and Five were rated similarly by parents, with 38% to 40% rating the channels positively on this aspect. Channel 4 contributes noticeably less to this PSB element, perhaps because the channel focuses its programming on teens rather than younger children.

Figure 9.11: Parents' opinions on Children's programming: delivery by each channel

It provides a wide range of high-quality and UK-made programmes for children

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



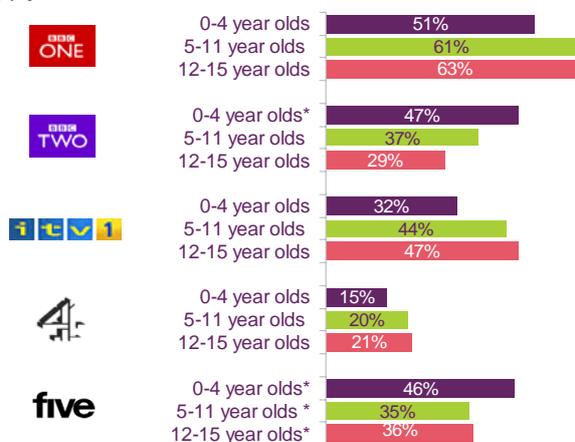
Base for 'all PSB channels': All respondents who are parents/carers of children in household = 949
 Base for individual channels: Self-reported regular viewers of each channel who are parents/carers of children in household: (amalgamated data: July 07, Oct 07). BBC1 = 645, BBC2 = 207, ITV1 = 490, Channel 4 = 321, five = 177; (amalgamated data: July 07, Oct 07) Sky One = 125

The extent to which parents of children of different ages see individual channels as offering well-made, high quality UK-made programmes for children is shown in figure 9.12. The type of programming available on the different channels (e.g. Milkshake on BBC Two) is clearly affecting opinions of the channels; BBC One and ITV1 are more likely to be rated well by parents of over 5-11 and 12-15 year olds (61% and 62%) than by parents of pre-school children (51%), while parents of pre-school children tend to rate BBC Two more positively than parents of the older age groups (47% vs. 37% and 29%). The sample sizes for Five are small, and we have not identified statistically significant differences, although the data suggest that the channel is rated more positively by parents of younger children. Channel 4 is not seen by parents of any group to be contributing greatly to this element of PSB.

Figure 9.12: Opinions on Children’s programming delivery by each channel: by parents of different ages

It provides a wide range of high-quality and UK-made programmes for children

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



Base = Amalgamated data (July 07, Oct 07), Self-reported regular viewers of channels who are parents/guardians of children in household BBC1 = 0-4 years old (265); 5-11 years old (353); 12-15 years old (257). BBC2 = 0-4 years old (75*); 5-11 years old (111); 12-15 years old (101). ITV = 0-4 years old (197); 5-11 years old (255); 12-15 years old (197). C4 = 0-4 years old (147); 5-11 years old (165); 12-15 years old (124). Five = 0-4 years old (81*); 5-11 years old (97*); 12-15 years old (61). * Small base size - data should be viewed as indicative only.

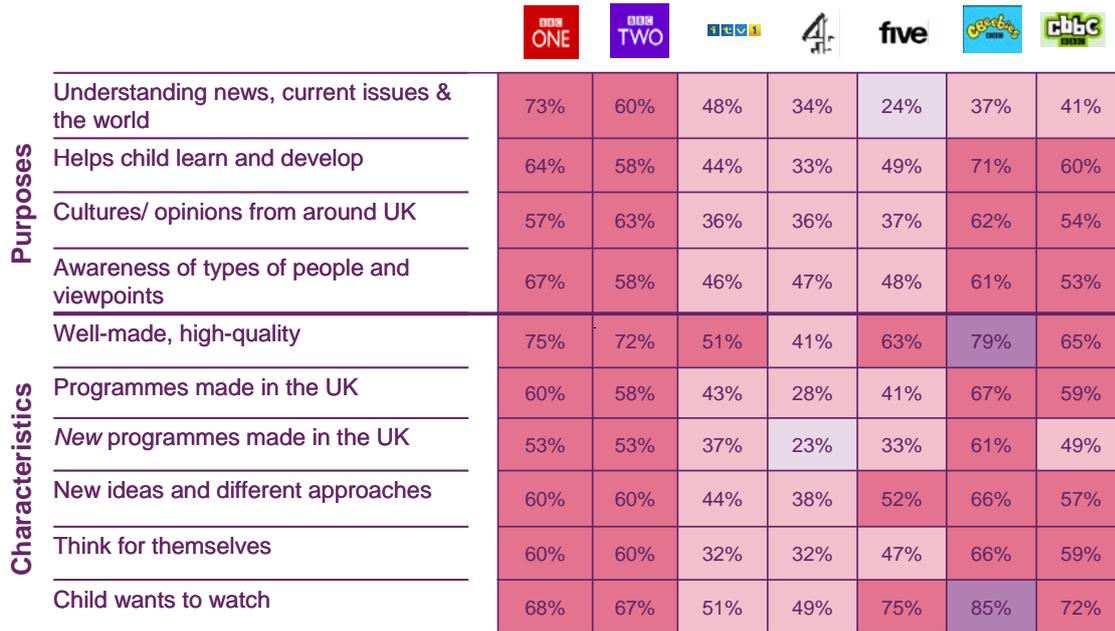
Children’s PSB Survey

A separate survey was carried out in April 2007 which asked parents to give more detailed opinions on the main PSB channels and CBBC and CBeebies in relation to children’s programming⁴⁹. This survey asked about children’s programming by translating relevant purposes and characteristics into ten research statements. Parents rated each channel in terms of the delivery against each statement (see Figure 9.13).

BBC One, BBC Two, CBeebies and CBBC in particular are seen by parents to be delivering well against many of the elements of the PSB purposes and characteristics. The quality of the children’s programmes on ITV1 and Five were appreciated and Five’s programmes were also seen as having new ideas and different approaches and being programmes that children want to watch.

⁴⁹ This research fed into *The Future of Children’s Television Programming* consultation document published in October 2007.

Figure 9.13: Opinions on Children’s programming delivery by PSB channels, Children’s PSB survey, April 2007



Key: 0 – 25% 26 – 50% 51 – 75% 76 – 100%

Source: Children’s PSB Survey, April 2007. % rating 7/8/9/10 for agreement with each statement. Parents of children aged 2 – 15.

Section 10

S4C

Introduction

This section looks at S4C in Wales in terms of output, viewing and audience perceptions among those who watch Welsh-language programming on the channel.

Summary findings

Output hours

- Welsh-language programming accounted for 4,643 hours of the S4C service in 2007; this is higher than in 2006 (an increase of 113 hours) and continues the gradual trend of increasing volume of Welsh programming seen since 2004.
- Since 2006, the amounts of commissioned and acquired hours of Welsh-language programming have remained similar, while repeats and the BBC statutory hours have increased.
- Originated Welsh-language output by genre shows the continued dominance of Factual programming, and also high levels of Sports output.

Viewing figures

- The weekly reach of Welsh-language programming on S4C was 20% in 2007; this is a decrease from 24% in 2006 and continues a longer-term trend.
- S4C's share of all viewing (i.e. not just for Welsh-language programming) was 3.0% in 2007 and its share of peak-time viewing (which by definition is focused on Welsh-language programming) in 2007 was 3.2%.

Audience impact

- Regular viewers of S4C Welsh-language programming associate the channel most strongly with PSB purpose 1, relating to trustworthy news provision, and to purpose 3, relating to regional/national output. These purposes are most strongly aligned with the requirements of the Communications Act 2003 on S4C:
- S4C is seen by 8 in 10 (79%) of its regular viewers as *providing a range of good quality programmes about my nation, made for people in my nation*
- 6 in 10 people see it as *portraying their nation well to the rest of the UK*.
- Two-thirds believe the news programmes are trustworthy
- 58% believe that S4C covers national events well
- As may be expected, S4C alone is less likely than the PSB channels taken together to be seen as providing many of the elements of PSB (such as making the viewers *more interested in subjects after watching programmes and having interesting programmes about history, sciences or the arts*).

- However, S4C's particular strengths relate to the range of good quality non-News available and the portrayal of the nation:
- S4C is more strongly associated with the statement '*aside from news, it provides a range of good quality programmes about my nation, made for people in my nation*' than the PSB channels taken together; 79% say this for S4C, while 53% say it for all the PSB channels together.
- S4C is also strongly associated with '*it portrays Wales well to the rest of the UK*' with 60% saying this for S4C, and 46% saying it for the channels together.

Background

The Welsh Authority has the statutory responsibility to provide S4C (analogue) and S4C Digidol (digital) services for viewers in Wales⁵⁰.

Along with around 47 hours per week of Welsh-language programmes at peak times, S4C analogue broadcasts re-scheduled and live Channel 4 programmes at other times, while S4C Digidol broadcasts around 89 per week of Welsh-language programmes⁵¹.

S4C is a 'commissioner broadcaster' and the majority of its programmes are sourced from independent producers. In addition, the BBC supplies a minimum of 10 hours per week of programmes free of charge to the Authority, which are funded out of the BBC's licence revenue, along with additional programmes commissioned by S4C. ITV Wales also contributes programmes to S4C.

Details of S4C's statutory requirements, as outlined in the Communications Act, are as shown in Figure 10.1.

Figure 10.1: S4C's statutory requirements

On Analogue:	On Digital:
Provision of a broad range of high quality and diverse programming	Provision of a broad range of high quality and diverse programming
A service in which a substantial proportion of the programmes consist of programmes in Welsh	A service in which a substantial proportion of the programmes consist of programmes in Welsh
The programmes broadcast between 6.30pm and 10pm every day consist mainly of programmes in Welsh	
The programmes that are not in Welsh are normally programmes which are being, have been or are about to be broadcast on Channel 4	

The Act also specifies that its services must include News and Current Affairs programming.

⁵⁰ S4C Digidol is also available outside Wales on digital satellite on channel 134, and is streamed live on broadband at s4c.co.uk and on some IPTV networks.

⁵¹ All Welsh-language output shown on analogue is also shown simultaneously on S4C Digital. The rest of the schedule comprises new programming, extended coverage of certain cultural and sporting events, repeats and archive material.

In order to provide relevant information about audience views relating to S4C programming in Welsh, the PSB Tracker was boosted in Wales from January 2006. Opinions are based on regular viewers of Welsh-language programming on either the analogue or the digital channel, rather than regular viewers of S4C as a whole. The PSB Tracker results in this chapter are based on the Welsh boost rather than the UK-wide research.

Output hours

Figure 10.2 shows that Welsh-language programming accounted for 4,643 hours of the S4C service⁵² in 2007. This figure is higher than in 2006 (an increase of 113 hours) and continues the gradual trend of increased hours of Welsh programming since 2004.

This figure also illustrates the amounts of commissioned, acquired and repeated Welsh-language programming shown, along with the number of BBC statutory hours provided. Since 2006, the amounts of commissioned and acquired hours have remained similar, while repeats and the BBC statutory hours have increased. The majority of Welsh-language programmes are repeats (2,585 hours) and output commissioned from independent producers (1,236 hours).

Figure 10.2: Type of Welsh-language output on S4C, 2003-2007



Source: S4C (2007)

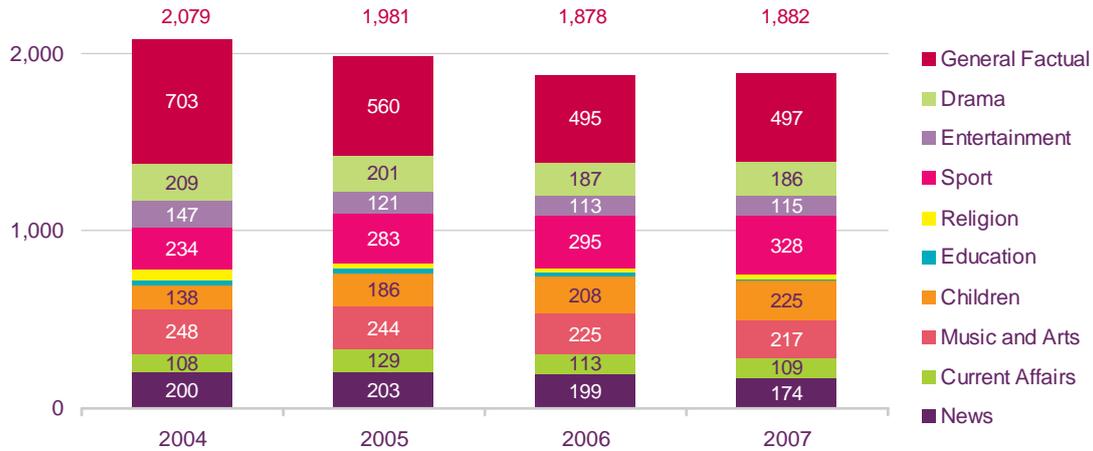
Notes: The BBC statutory hours are not broken down into acquisitions, commissions or repeats

Originated output by genre since 2004 is shown in Figure 10.3 (excluding repeats and acquisitions). It shows the continued dominance of Factual programming, and high levels of Sports output in 2007. Children's and Sports output has again increased slightly year on year, while News and Education output has decreased.

⁵² S4C Analogue shows the same Welsh-language programmes as S4C Digital. S4C Digital transmits approximately 89 hours per week of Welsh language programming of which around 47 hours is simulcast on S4C Analogue.

Figure 10.3: Annual hours of originated Welsh-language output on S4C, 2004-2006

Hours of originated Welsh language output (including BBC statutory hours)



Source: S4C (2007)

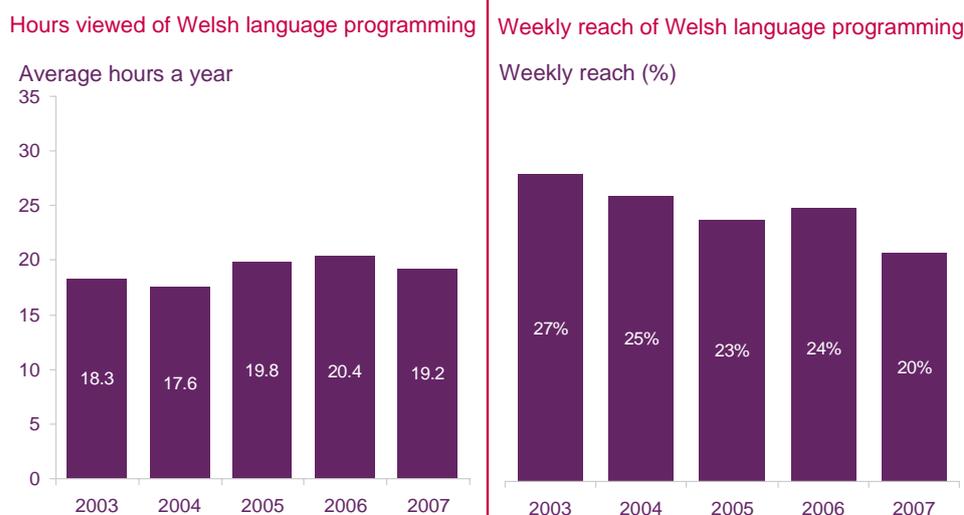
Note: includes BBC statutory hours. BBC statutory hours are not broken down into acquisitions, commissions or repeats, therefore a nominal number of the hours in this chart may consist of repeated material.

Viewing figures

Viewing data are taken from the BARB measurement system, which examines S4C Welsh output as a whole, combining both analogue and digital, in order to provide an overall picture of the amount of Welsh programming viewed⁵³. These data are illustrated in figures 10.4 to 10.5

S4C Welsh-language programmes were watched for an average of just over 20 hours per year in 2007 (the equivalent of 24 minutes per week). The weekly reach of Welsh-language programming on S4C was at 20% in 2007; this is a decrease from the reach of 24% in 2006 and fits with the longer-term trend of declining weekly reach of S4C Welsh-language programming.

Figure 10.4: Viewing of Welsh-language output on S4C, 2003-2006



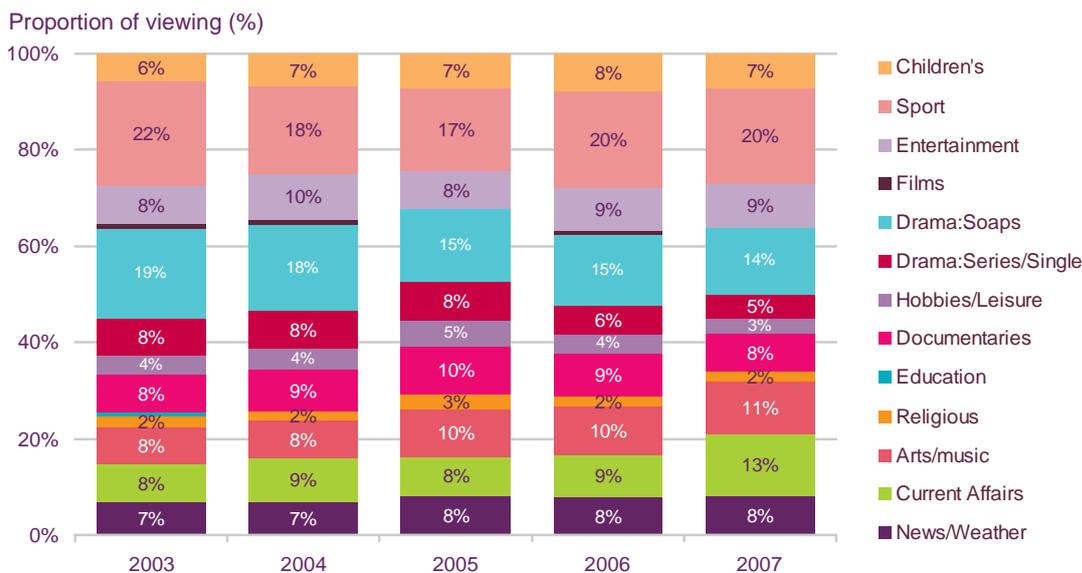
Source: S4C/BARB. S4C Region. All Individuals

⁵³ Source: S4C analysis of BARB.

S4C's share of all viewing (i.e. not just to Welsh-language programming) was 3.0% in 2007 and its share of peak time viewing (which by definition is focused on Welsh-language programming) in 2007 was 3.2%.

Figure 10.5 indicates the proportions of viewing of different genres on S4C in 2007. Sports and Drama (including Soaps and single dramas) were the most often watched genres, with 20% and 19% of viewing respectively. Current Affairs was the genre that increased viewing the most from 2006 to 2007.

Figure 10.5: Proportion of viewing of genres on S4C, 2007



Source: S4C/BARB/Infosys (BARB). S4C Region, All individuals

Audience impact

In 2007 the PSB tracker asked viewers of Welsh-language programming on S4C about their opinions of how important it is that PSB channels fulfil elements of the PSB purposes and characteristics, how they rate S4C on achieving these purposes and characteristics, and how they rate the PSB channels together on these elements.

Figures 10.6 and 10.7 show the extent to which regular viewers of Welsh programming on S4C associated PSB purposes and characteristics with the channel.

For regular viewers of S4C Welsh-language programming, the strongest PSB associations with the channel are connected to purpose 1: '*Informing our understanding of the world*' and purpose 3: '*Reflecting UK cultural identity*'. S4C is seen by 8 in 10 (79%) of its regular viewers as providing a range of good quality programmes *about my nation, made for people in my nation* and 6 in 10 people see it as *portraying their nation well to the rest of the UK*⁵⁴. Two-thirds believe the news programmes are trustworthy and 58% believe that it covers national events well.

When the opinions of Welsh-language programme viewers in 2007 are compared to those in 2006, the only statistically significant change in opinions on the purposes is the increase in

⁵⁴ S4C Digital is available across the UK on digital satellite systems, and so while this statement may not seem particularly applicable to the S4C channel, nonetheless responses show that viewers of its Welsh-language programmes feel this is achieved by the channel. It may also be the case that respondents simply focused their response on the first part of the statement.

the proportion of people strongly associating the channel with *showing different kinds of cultures and opinions* in the UK.

Figure 10.6: Welsh-language viewer opinions of delivery of PSB purposes on S4C

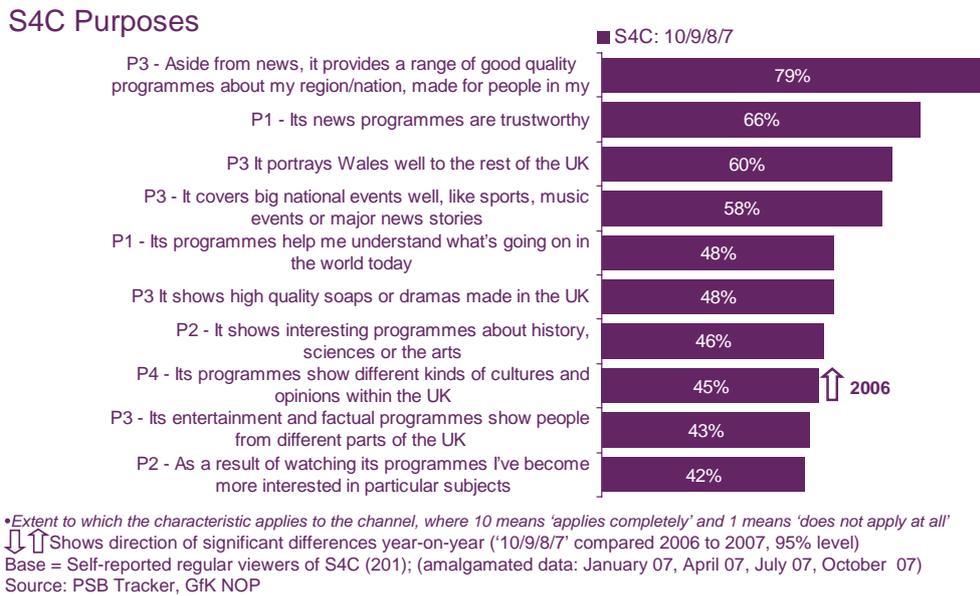
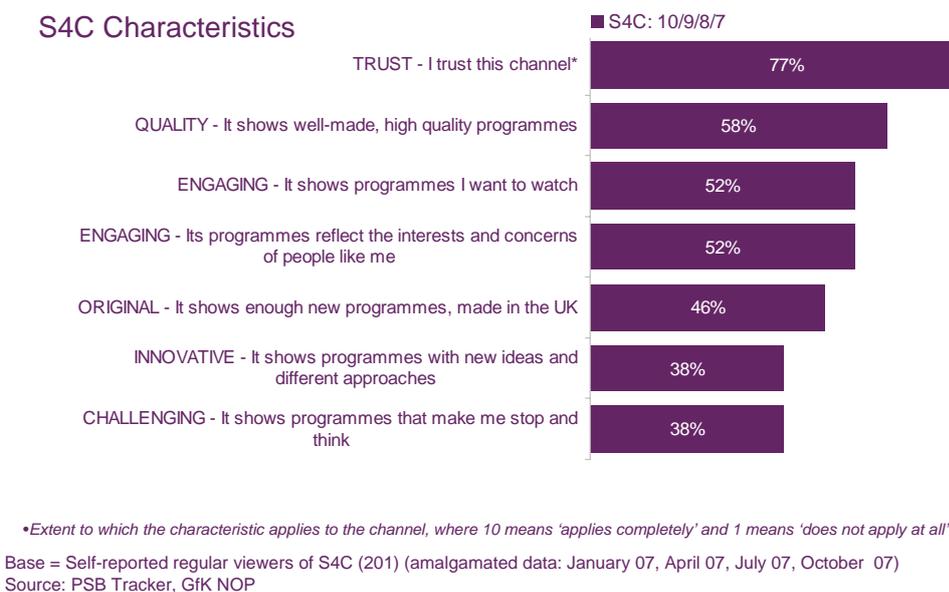


Figure 10.7 illustrates how regular viewers of Welsh programming on S4C see the PSB characteristics as applying to S4C.

Regular viewers of Welsh-language programmes on S4C tended to say that they trusted the channel (77%) and saw the channel as providing high quality (58%) and engaging programmes (52% said it showed *programmes they wanted to watch* and 52% said it *reflected the interests and concerns of people like them*). There are no statistically significant changes in Welsh-language programme viewers' opinions relating to the characteristics between 2006 and 2007.

Figure 10.7: Welsh-language viewer opinions of delivery of PSB characteristics on S4C



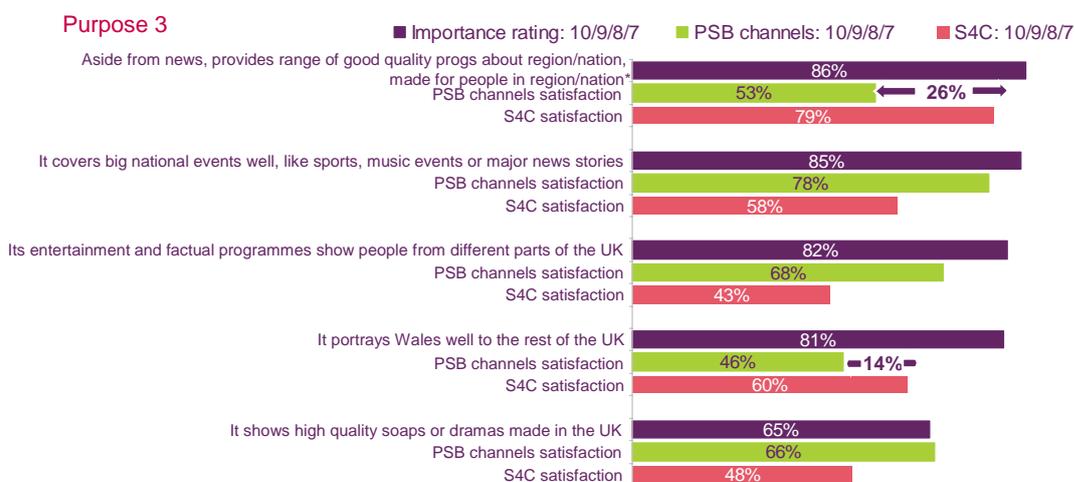
The previous two figures show the opinions of the Welsh-language viewers of S4C on the purposes and characteristics, giving an overall picture of how the channel is perceived. The next three figures show the opinions of S4C in the context of the importance placed on each purpose and characteristic and the extent to which the PSB channels taken together are seen to be delivering against each element.

Analysis of the opinions of those who watch S4C Welsh-language programmes shows that viewers saw it as important that the PSB channels together fulfil the purposes and characteristics, with between 65% and 97% of viewers believing that each purpose or characteristic is important.

The particular remit of S4C and its role in a devolved nation mean that opinions relating to purpose 3: *'Reflecting UK cultural identity'* are very relevant. These are shown in Figure 10.8. Welsh-language viewers saw S4C as delivering particularly well on its range of good quality non-News programming and on the portrayal of the nation. S4C is more likely to be associated with the statement *'Aside from news, it provides a range of good quality programmes about my nation, made for people in my nation'* than are the PSB channels taken together; 79% say this for S4C, while 53% say it for the channels together. This is also the case for *'It portrays my region well to the rest of the UK'* with 60% saying this for S4C and 46% saying it for the channels together⁵⁵.

The PSB channels together are more likely to be associated with all the other purposes and characteristics than S4C, or to be associated at a similar level (see figure 10.8)⁵⁶.

Figure 10.8: Welsh-language viewer opinions of the importance and delivery of PSB purpose 3: reflecting UK cultural identity



*Extent to which the characteristics is important, where 10 means "extremely important" and 1 means "not at all important"
 *Extent to which the characteristic applies to the channels together, where 10 means 'applies completely' and 1 means 'does not apply at all'
 Base = Self-reported regular viewers of S4C (201); All channels combined (201); Importance (177) (amalgamated data: January 07, April 07, July 07, October 07)
 Source: PSB Tracker, GfK NOP

Figure 10.9 illustrates how regular viewers of Welsh programming perceive the importance and delivery of purposes 1, 2 and 4.

⁵⁵ S4C Digital is available across the UK on digital satellite systems, and so while this statement may not seem particularly applicable to the S4C channel, nonetheless responses show that viewers of its Welsh-language programmes feel this is achieved by the channel. It may also be the case that respondents simply focused their response on the first part of the statement.

⁵⁶ NB It should be remembered that the channels together are required to deliver these characteristics, rather than any channel alone.

S4C has a specific remit in the area of News and it rivals the PSB channels taken together on the trustworthiness of its news. It is seen as being strongly associated with the statement *'Its news programmes are trustworthy'* by 66%, while 74% say this for the channels together. This is the smallest difference between S4C and the PSB channels taken together across all the aspects of purposes 1, 2 and 4.

Figure 10.9: Welsh-language viewer opinions of the importance and delivery of PSB purposes 1, 2 and 4

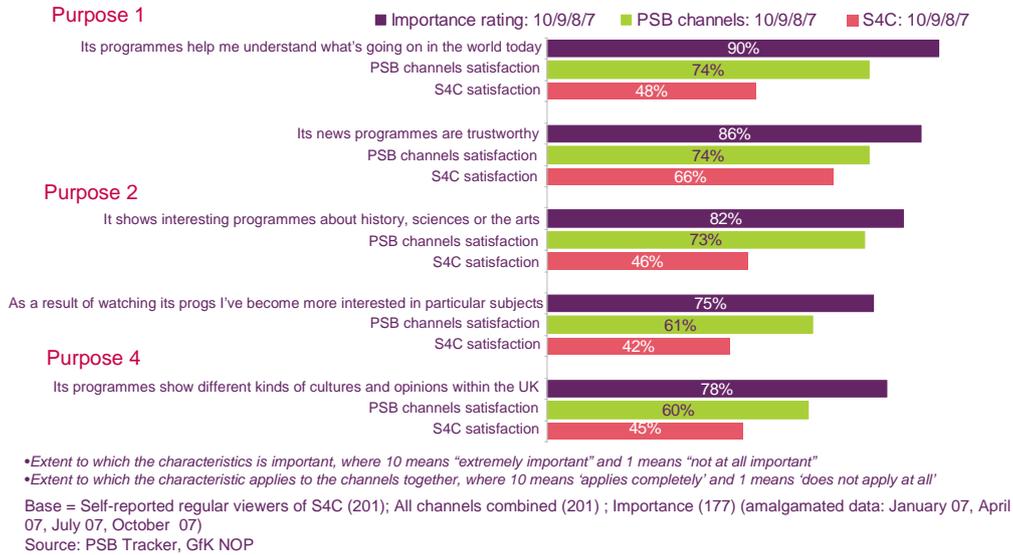
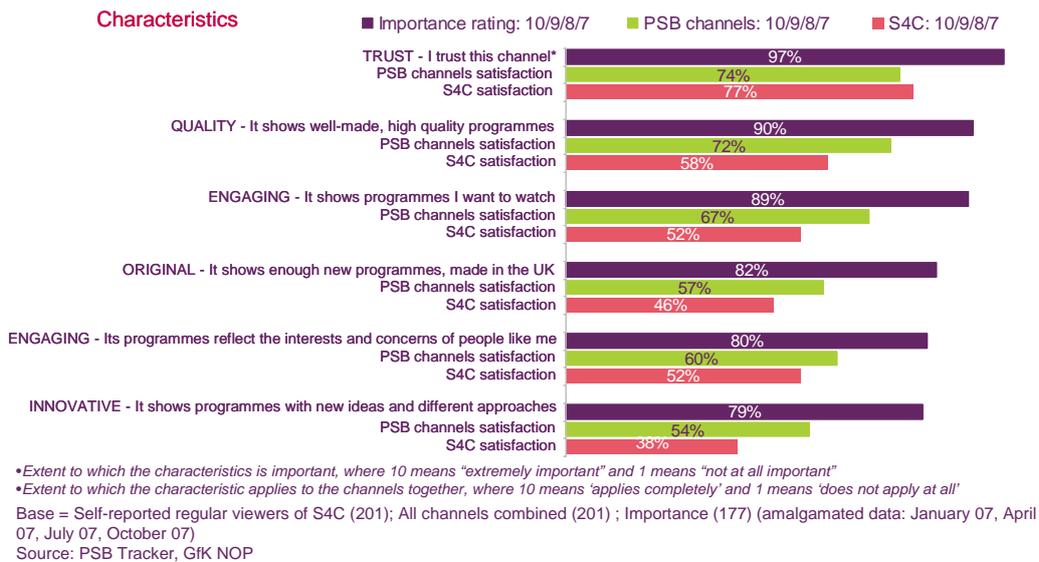


Figure 10.10 shows how regular viewers of Welsh programming perceive the importance and delivery of the PSB characteristics⁵⁷. S4C is also strong in the area of *trust* and *programmes reflecting the interests of the viewers*. It is seen as being associated with the statement *'I trust the channel(s)'* by 74%, while 77% say this for the channels together.

Figure 10.10: Welsh-language viewer opinions of importance/ delivery of characteristics



⁵⁷ NB It should be remembered that the channels together are required to deliver these characteristics, rather than any channel alone, and also these do not form a key part of the channel's remit.

Section 11

Public service text services

Introduction

This section focuses on the public service text services, in particular providing an indication of the PSB requirements of Teletext and the public's use of, and views on, the service on ITV and Channel 4.

Summary findings

- The reach of analogue Teletext and Ceefax declined sharply between 2004 and 2006. This decline continues across all the main PSB channels from 2006 to 2007, albeit at a slower rate. The analogue service is currently more popular with viewers than the digital terrestrial television service, even in digital television households.
- Whilst almost two-thirds (63%) of adults said they never used Teletext on ITV and Channel 4, of those who did claim to use Teletext (36%), almost seven in ten said they used it at least once a week⁵⁸.
- Claimed use of Ceefax was also around one-third (34%) while use of Sky Text was lower at 13%.
- Regional (55%) and national news (51%) pages are claimed to be among the most-viewed information on Teletext on ITV and Channel 4, along with weather (66%), sports (55%) and entertainment/lottery (51%).
- Viewers of the Ceefax and SkyText services were more likely to say they read information on sports on these services than viewers of Teletext.
- Opinions of Teletext tend to be positive among those who use the service at least once a month:
 - They tend to rate the service positively in relation to purpose 1 as they see the news content as *trustworthy* (67%) and believe that the service *helps them understand what is going on with the world* (62%).
 - Around two-thirds (65%) acknowledge that the pages are regularly updated and see the service as having *well-made high quality content* (50%).
 - Teletext is also seen by 58% as *covering big national events well*
 - Regional News and non-News content tends to be less well rated in terms of quality than the other purposes and characteristics.
- Although the services are very different in nature, it is interesting to see that Teletext users' opinions on the service in relation to purpose 1 compare well to viewers' opinions of the PSB TV channels.

⁵⁸ NB claimed usage in the PSB Tracker is higher than BARB measurement of usage.

Background

The public Teletext service is a designated public service broadcaster, as set out in the 2003 Communications Act. The BBC operates analogue (Ceefax) and digital TV (BBCi) text services under service licences set out by the BBC Trust.

The licensee, Teletext Ltd, provides text pages behind the analogue broadcasts of ITV1, Channel 4 and the digital channel 100. The licensee also operates other digital services, such as Teletext Holidays and the services behind the digital broadcasts ITV1 and Channel 4, outside of the scope of the licence.

The Communications Act 2003 outlines the PSB remit of the public Teletext licensee as:

- contributing to the PSB objectives generally (s264) along with the other public service broadcasters;
- providing a range of high quality and diverse text material (s265); and
- completing a similar statement of programme policy (SOPPs) process to the TV network, involving preparing a statement of service policy and monitoring performance in carrying out the proposals.

The public service remit is required to be fulfilled separately by both the analogue and the digital Teletext services.

The public Teletext licence specifies a certain amount of pages of text on genres which relate to the PSB remit and the PSB purposes and characteristics. Simplified, these requirements relate to regional News and non-News provision, and to the provision of national News:

- not less than 30 main pages of national News (on both the analogue and digital service);
- not less than 12 main pages of regional News (on both the analogue and digital service); and
- not less than 40 main pages of regional non-News pages on the analogue service and not less than 24 on the digital service (this requirement is for each Channel 3 region).

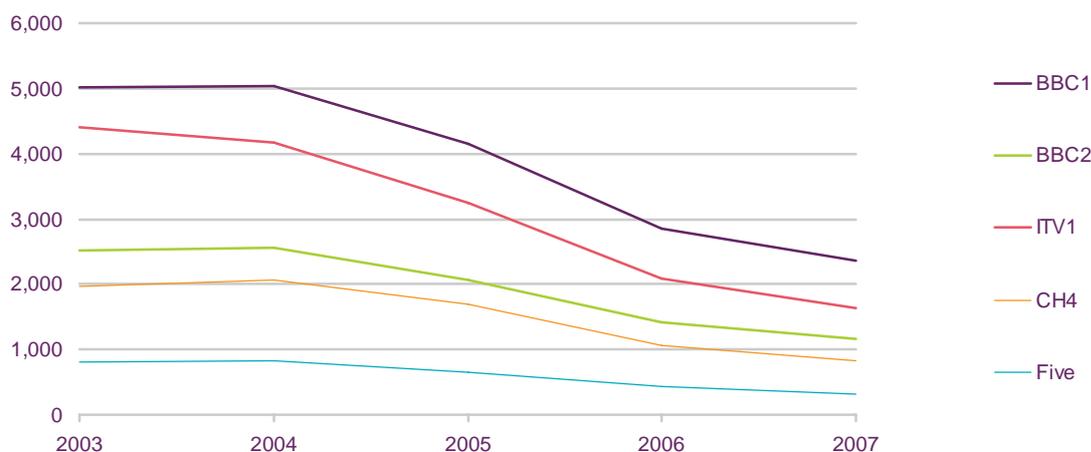
Viewing figures

The analogue text services are accessed by pressing the text button on compatible TV sets. The Ceefax service is accessed behind the BBC channels; the Teletext services are accessed behind Channel 3 and Channel 4.

BARB analysis shows that the reach of analogue Teletext and Ceefax declined sharply between 2004 and 2006. This decline continued from 2006 to 2007, albeit at a slower rate. Ceefax on BBC One remains the service with highest reach in 2007, with just under 2.4 million users. Teletext on ITV1 is the second most popular service, with a 1.6 million reach in an average week. Ofcom research found that the analogue Teletext service is currently more popular with viewers than the digital terrestrial television service, even in digital television households.

Figure 11.1: Weekly reach of text services

TV Text services – average weekly reach (000s)



Source: BARB

Viewing to text services amongst all individuals, (reach based on 3mins consecutive)

Audience impact

The Ofcom PSB tracker⁵⁹ included questions about claimed use of, and opinions about, Teletext on ITV and Channel 4, and the findings are shown in figures 11.2 to 11.6.

Just over a third of people with access to the service said they used Teletext on ITV or Channel 4 (36%) in 2007⁶⁰. A similar percentage (34%) claimed to use Ceefax in 2007, while use of Sky Text was lower, at 13%. Given changes in methodology and question wording since 2006, caution should be used when directly comparing results, although it is still worth noting that claimed use of Teletext in 2006⁶¹ research was 49%.⁶²

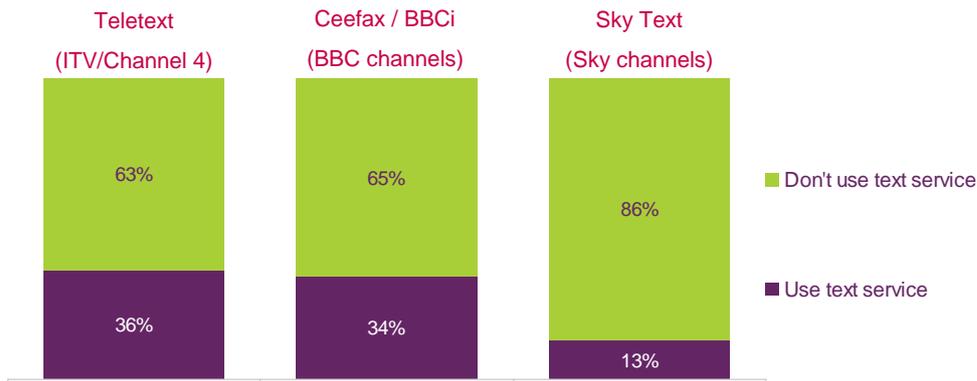
⁵⁹ Interviewing was carried out as part of the PSB tracker via telephone in October 2007. Questions about Teletext were asked of those who could access text services, resulting in 1809 interviews.

⁶⁰ NB claimed use in the PSB Tracker is higher than the BARB measurement of use.

⁶¹ Research was carried out via a telephone omnibus in September 2006 with 2099 respondents. Data was weighted to be representative of the UK.

⁶² Respondents may be overestimating their use of Teletext and Ceefax. This may be due to a confusion between the services or simply an overestimation of the frequency with which they access the services.

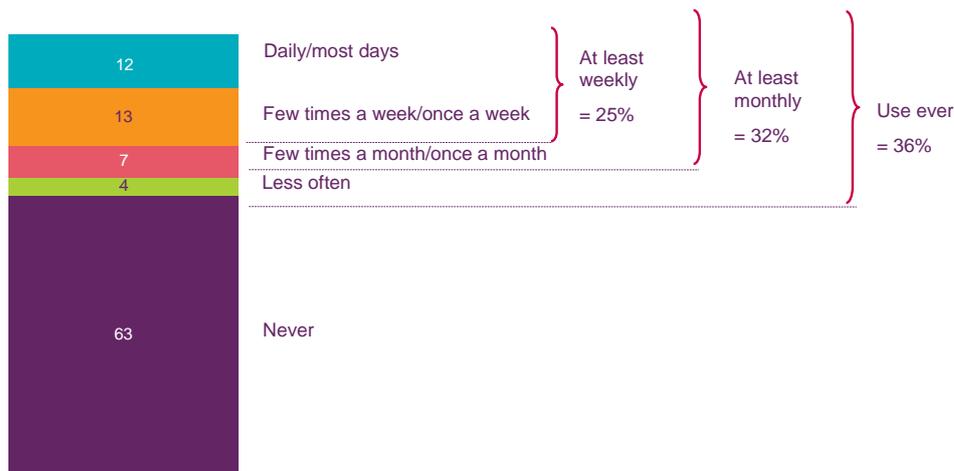
Figure 11.2: Claimed use of Teletext and other text services



Base = All respondents who can receive each service: Teletext (1809); Ceefax/BBCi (1809); Sky Text (1320).
 NB 1% of each group said "don't know"
 Source: PSB Tracker, GfK NOP Media, Oct 2007

Figure 11.3 shows the claimed frequency of use of Teletext on ITV and Channel 4. This indicates that those who claim to use the services say they do so relatively often - 12% of those with access to the service claim to use it daily, or most days, and 25% claim to use it at least weekly. Of those that claim to use Teletext, nearly seven in ten said they used it at least weekly.

Figure 11.3: Frequency of Teletext use



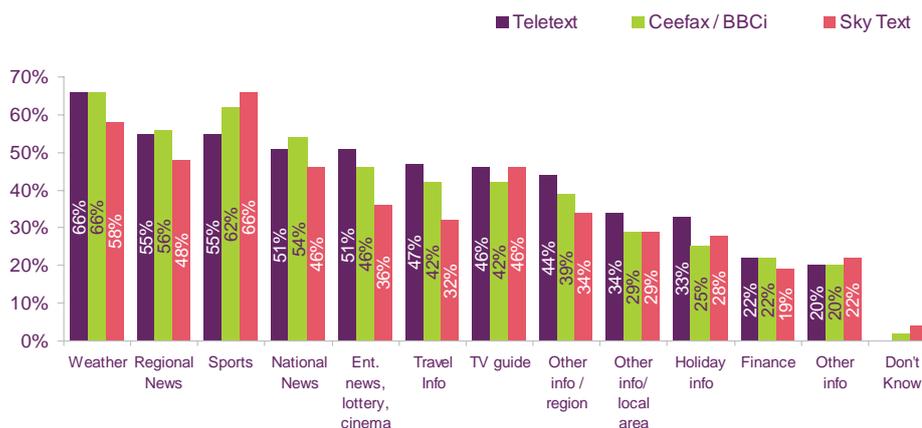
Q14a: How often do you use Teletext?
 Base = All respondents (1809). Note 11 respondents who answered "don't know" when asked whether they used Teletext - these represent less than 1% and so do not appear on the chart
 Source: PSB Tracker, GfK NOP Media, Oct 2007

The most popular types of pages⁶³ accessed by Teletext users on ITV and Channel 4 in 2007 were Weather (66% of viewers), regional News (55%), Sports (55%), national News (51%), and Entertainment/TV listings guides (51%) (Figure 11.4).

Viewers of the Ceefax and Sky Text services were more likely to claim that they read information on Sports on these services than were viewers of Teletext (66%, 62% and 55% respectively).

⁶³ Among viewers who claimed to read pages on Teletext at least once a month

Figure 11.4: Claimed types of information accessed on Teletext



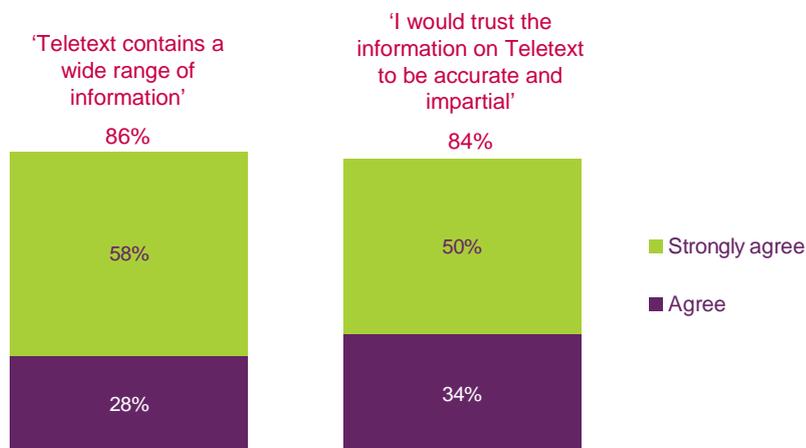
Q16a/b/c: Which, if any, of the following types of information do you read on <insert provider>?

Source: PSB Tracker, GfK NOP Media, Oct 2007

Base = All respondents who use each service at least once a month: Teletext (618); Ceefax/BBCi (604); Sky Text (178)

Figure 11.5 provides information on how Teletext users (defined as those having viewed pages once a month or more often on ITV or Channel 4) feel about the service in terms of breadth of information and the impartiality of the information. Opinions on both the breadth of information and the impartiality of Teletext are generally positive, with 86% agreeing that there is a wide range of information available, and 84% agreeing that they can trust the service to be accurate and impartial.

Figure 11.5: Opinions of Teletext service: range and impartiality



Q17a/b: How much do you agree or disagree that...

Base = All respondents who use Teletext at least once a month (618)

Source: PSB Tracker, GfK NOP Media, Oct 2007

Users of Teletext on ITV or Channel 4 were also asked to rate the service against a number of other statements that were designed to reflect the PSB purposes and characteristics more generally. Figure 11.6 shows the proportion of Teletext users who said that the statements particularly applied to the service (rating 7-10 out of 10).

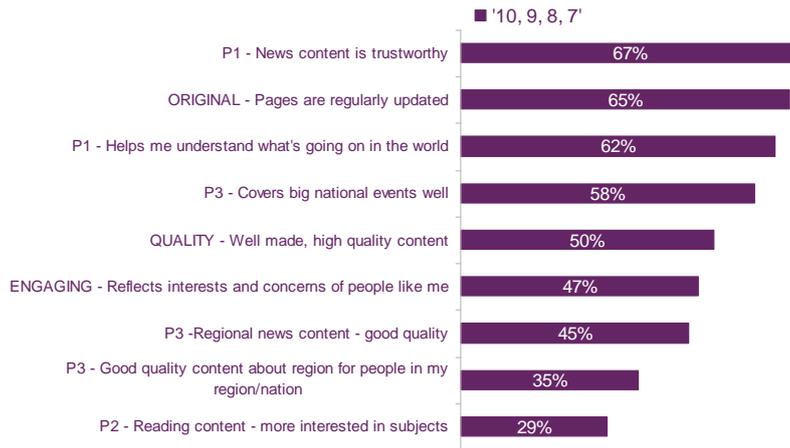
From the ratings given by the Teletext users, it is clear that they tended to rate the service well in relation to purpose 1, as they saw the news content as *trustworthy* (67%) and believed that the service *helps them understand what is going on with the world* (62%). Teletext was also seen by 58% of users as *covering big national events well* (purpose 3).

Although the services are very different in nature, it is interesting to see that Teletext users' opinions on the service in relation to purpose 1 compared closely to viewers' opinions of the PSB TV channels together⁶⁴.

Around two-thirds of Teletext users (65%) acknowledged that the pages were regularly updated and saw the service as *having well-made high quality content* (50%).

Regional news and non-News content tended to be less well rated in terms of quality than the other elements of the purposes and characteristics.

Figure 11.6: Opinions of Teletext service: purposes and characteristics



Ratings of Teletext: All users

Q18: I'd now like to ask you to rate Teletext on some of the aspects of broadcasting that we've been talking about. The first statement is... How would you rate Teletext on this statement? where 10 means "applies completely to this channel" and 1 means "does not apply at all to this channel" Base = All respondents who use Teletext at least once a month (618)

Source: PSB Tracker, GfK NOP Media, Oct 2007

⁶⁴ Section 3 identified that 67% of viewers saw the PSB TV channels together as helping their understanding of the world and 64% saw the news content as trustworthy.

Section 12

Channel summaries

Introduction

This section sets out what regular viewers think of each PSB channel, in order to give an overview of the character of each channel in relation to the PSB purposes and characteristics.

Summary findings

- Regular viewers of each of the main five channels tended to have a more positive view of the channels in 2007, in comparison to 2006⁶⁵.
- Regular viewers of BBC One see the channel as contributing particularly to PSB purpose 1, *informing our understanding of the world*. It is also seen to deliver purpose 3, *reflecting UK cultural identity*.
- BBC Two is seen as particularly contributing to PSB purpose 2, *stimulating knowledge and learning*, and the PSB characteristic of programme *quality*.
- ITV1 continues to be characterised by contributing towards purpose 3, *reflecting UK cultural identity*, relating to the *coverage of big national events*, the provision of *high-quality* Soaps and Drama and the *quality* of regional News programmes. The channel is also associated with PSB purpose 1, *informing our understanding of the world*.
- Channel 4's strongest associations for regular viewers tend to relate to PSB purpose 1 and the characteristics, in particular *high-quality* programmes, being a *channel they can trust*, being *engaging* and *having programmes that make viewers stop and think*. Being *innovative*, *challenging* and *representing diversity and alternative viewpoints* also rank more highly within the overall set of statements than do the other main PSB channels.
- Five's strongest delivery relates to the PSB characteristics of *engaging*, *high-quality* programmes, being a *channel they trust* and purpose 1 statements. Two PSB statements are ranked higher for Five than for any of the other PSB channels; these are the *range and quality of UK-made programmes for children* and *watching programmes has made the viewers more interested in subjects* (although the actual percentages are lower for Five than other PSB channels). These are defining features of Five, although it does not necessarily contribute more to PSB than the other channels in these areas.
- BBC Three is particularly associated with PSB characteristics; regular viewers tend to *trust the channel*, rate it on *high-quality* programmes, say it has *engaging* programmes, appreciate its original content and see the channel as *innovative*
- BBC Four is most associated with being a channel that regular viewers can *trust*, showing *high-quality* programmes, showing *interesting* programmes about history, science or the arts and helping viewers to *understand what's going on in the world*.

⁶⁵ The PSB tracker also found that BBC One and ITV1 had fewer people defining themselves as regular viewers in 2007 in comparison to 2006. This may to some extent explain the increased scores for these channels as the remaining viewers may be more likely to be loyal to the channels.

Background

This section provides a summary overview of regular viewers' opinions of each of the channels across all of the purposes and characteristics.

Before we analyse the opinions of the channels' viewers in detail, it is useful to understand if, and how, these regular viewers have changed over time. In 2007 the ranking of the PSB channels, according to which had the greatest proportion of self-defined regular viewers, was BBC One (68%), ITV1 (51%), Channel 4 (37%), Five (21%), BBC News 25 (19%), BBC Three (6%) and BBC Four (6%). BBC One, ITV1 and BBC Three now have lower proportions of potential viewers claiming to be regular viewers; a decrease of 2% each for BBC One and ITV1 and 4% for BBC Three.

Profiling self-defined regular viewers of each channel shows that self-defined regular viewers of the main five channels were more likely to have Freeview in 2007 than in 2006⁶⁶. BBC One's regular viewers are now more likely to be 65 years or over (20% vs. 18% in 2006) and are less likely to fall in the 45 to 64 age bracket (36% vs. 33% in 2006). Five's regular viewers were more likely to fall in the younger age group in 2007, with 49% of self-defined regular viewers being under 44 years old; this has increase from 43%. Claimed regular viewers of ITV1 in 2007 have become biased towards females; 56% were female in 2007 compared to 59% in 2006.

Any differences in the profile of self-defined regular viewers may be a function of market changes (e.g. continued take-up of digital TV or the lack of access to digital TV among some sub-groups), changing in viewing habits (e.g. more viewing of multichannel content) or may be a function of the programmes and schedule of channels (e.g. a more or less attractive broadcasting schedule). It is not possible to discern this from the Tracker data.

The important thing to note is that, despite the fact that opinions on each of the channels from regular viewers have improved in 2007 compared to 2006⁶⁷, the strengths of the main five channels *relative to each other* remain the same on all but one purpose/characteristic⁶⁸.

Given that BBC One and ITV1 had fewer people defining themselves as regular viewers in 2007 than in 2006, this may to some extent explain the increased scores for these channels, as the remaining viewers may be more likely to be loyal to the channels.

Channel summaries

Figure 12.1 provides a key to help identify which statements represent which PSB purposes and characteristics.

⁶⁶ See the methodology in the annex for more details on the profiling of regular viewers, including other changes in TV ownership in the Regular viewers of each channel.

⁶⁷ ITV1 and Five are rated more positively on purpose 1 elements. Purpose 2, 3 and 4 elements are tending to be rated more positively for all channels with the exception of Soaps and Drama, which are rated less well for BBC One and ITV1. All channels, except Channel 4 are rated more positively across the characteristics.

⁶⁸ In relation to purpose 1 – informing our understanding of the world, ITV1 now rivals BBC Two for trustworthy news programmes, whereas in 2006 BBC Two was ahead.

Figure 12.1: Key for Figures

Purpose 1 – Informing our understanding of the world
Purpose 2 – Stimulating knowledge and learning
Purpose 3 – Reflecting UK cultural identity
Purpose 4 – Representing diversity and alternative viewpoints
Characteristics

BBC One

Figure 12.2 shows the proportion of regular viewers of BBC One who said that each of the PSB purposes and characteristics particularly apply to the channel (rating 7-10 out of 10).

Regular viewers of BBC One see the channel as contributing particularly to PSB purpose 1, *informing our understanding of the world*. It is also seen to deliver purpose 3, *reflecting UK cultural identity*.

Relating to purpose 1, it is seen as helping people *to understand what is going on in the world* (79%), having News and Factual programmes that explain issues clearly (76%) and having trustworthy news programmes (75%). With regard to purpose 3, it is seen to *cover big national events* well (79%), to have *good quality* regional programmes (67%) and high quality Soaps and Drama *made in the UK* (60%).

Of the PSB characteristics, BBC One was most closely associated with programme *quality*, with nearly three-quarters (74%) of regular viewers particularly valuing the channel for showing *well-made and high-quality programmes* and 7 in 10 people (71%) stating that they *trust* the channel.

Figure 12.3 shows that among regular viewers of BBC One, there have been a number of positive changes in the perceptions of the channel. All except one have been positive changes, with views on the channel strengthening; the negative change in opinion relates to Drama and Soaps.

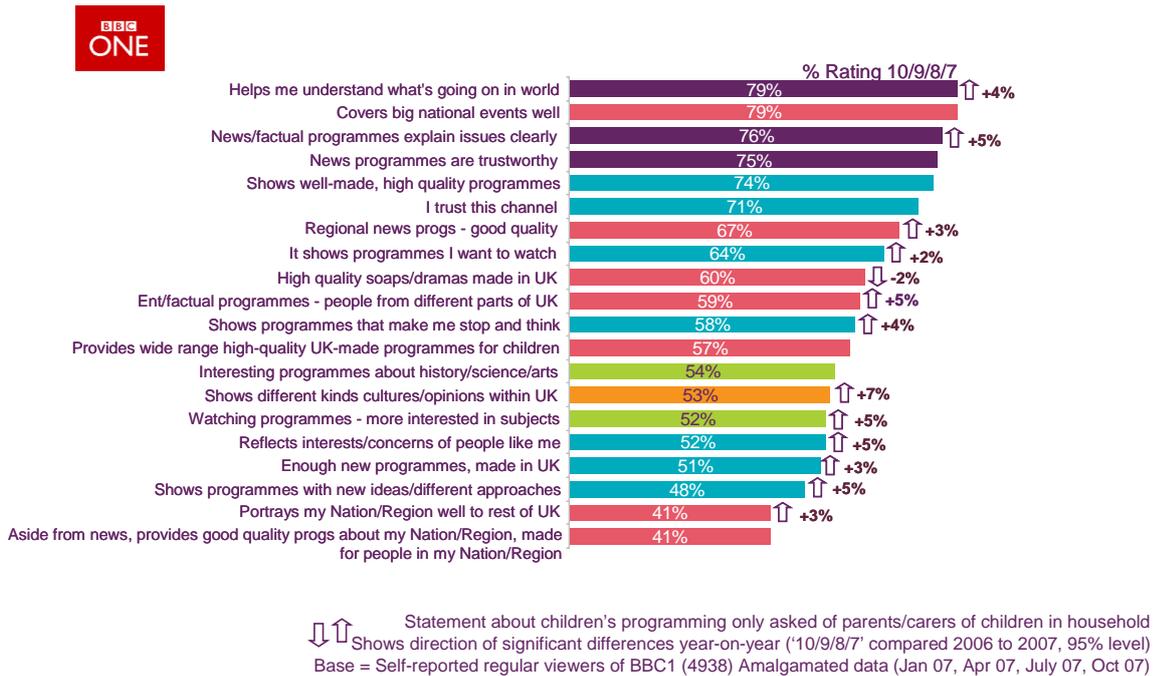
Looking at sub-groups within regular viewers of BBC One, there are some variations by gender, nation, ethnicity, socio-economic group and age group. Men are more likely than women to rate BBC One's programmes positively on aspects of purpose 1; for example, they are more likely to say *it shows news programmes and factual programmes that explain complicated issues clearly* and its news programmes are *trustworthy*. Men are also more likely to say that it shows *interesting programmes about history, sciences of the arts*.

Regular viewers in Wales are more likely to have positive opinions on the channel in relation to the non-News regional content, *portraying their nation well to the rest of the UK*, enabling an *understanding of what is going on in the world* and having *high quality* Soaps and Drama.

White regular viewers of BBC One tend to have a more positive opinion than those from ethnic minority groups on *covering big national events* well, *helping to understand what is going on in the world*, regional News and the overall *quality* of programmes.

Younger viewers are more likely to rate it positively for its Drama and Soaps, and older viewers and those in socio-economic group AB are more likely to agree with PSB statements relating to the purposes, while younger viewers are more likely to agree with statements relating to the characteristics.

Figure 12.2: BBC One channel summary



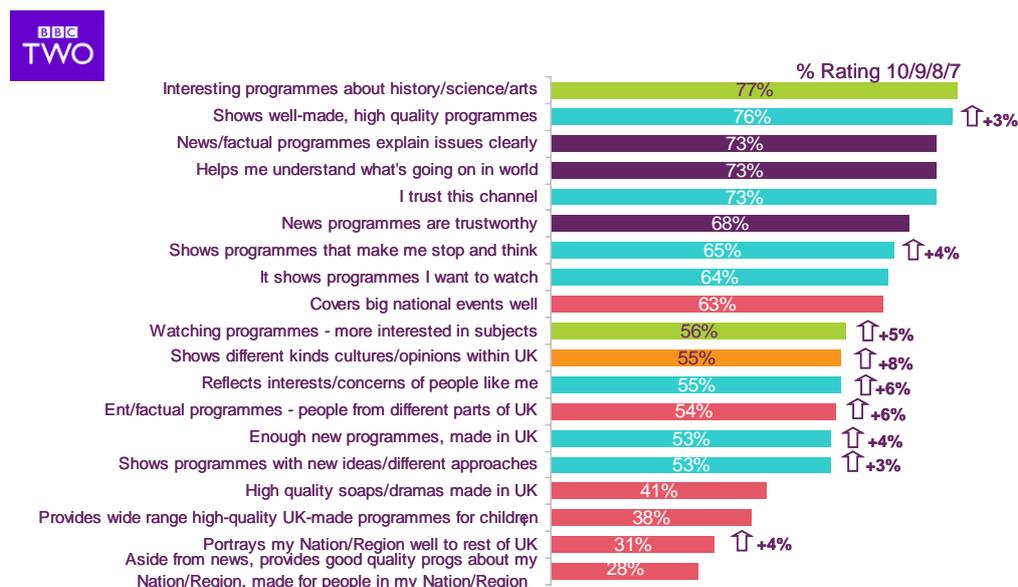
BBC Two

Regular viewers' opinions about BBC Two are shown in Figure 12.3. BBC Two is seen as particularly contributing to PSB purpose 2, *stimulating knowledge and learning*, and the PSB characteristic of programme *quality*.

Over three-quarters of the regular viewers strongly associated the channel with *interesting programmes about history, science or the arts* and 76% associated the channel with *well-made, high-quality programmes*. The channel is also rated well in relation to PSB purpose 1, *informing our understanding of the world*; in particular that its News and Factual programmes *explain issues clearly* (73%), and that it *helps people to understand what is going on in the world*.

Male regular viewers are more likely than women to value BBC Two in relation to *innovation, original content* and having *trustworthy news programmes*. Those in socio-economic group DE are less likely than ABs and C1C2s to value BBC Two across a number of elements of PSB. In particular, ABs are most likely to *trust* the channel, while fewer people in ethnic minority groups value the channel against some of the PSB elements than White respondents, for example, in having *high-quality programmes*, having *programmes I want to watch*, *showing interesting programmes about history, science or the arts* and *helping to give an understanding of what is going on in the world*.

Figure 12.3: BBC Two channel summary



¹ Statement about children's programming only asked of parents/carers of children in household
 ↓↑ Shows direction of significant differences year-on-year ('10/9/8/7' compared 2006 to 2007, 95% level)
 Base = Self-reported regular viewers of BBC2 (2378)
 Amalgamated data (Jan 07, Apr 07, July 07, Oct 07)

ITV1

Regular ITV1 viewers' opinions on the channel are shown in Figure 12.4. The channel continues to be characterised by contributing towards purpose 3, *reflecting UK cultural identity*. One of the three most highly-rated PSB statements is that relating to the coverage of *big national events* (69%). The provision of *high-quality* Soaps and Drama is acknowledged by two-thirds of regular viewers (66%) and the quality of regional News programmes is also rated well by 63% of the regular viewers.

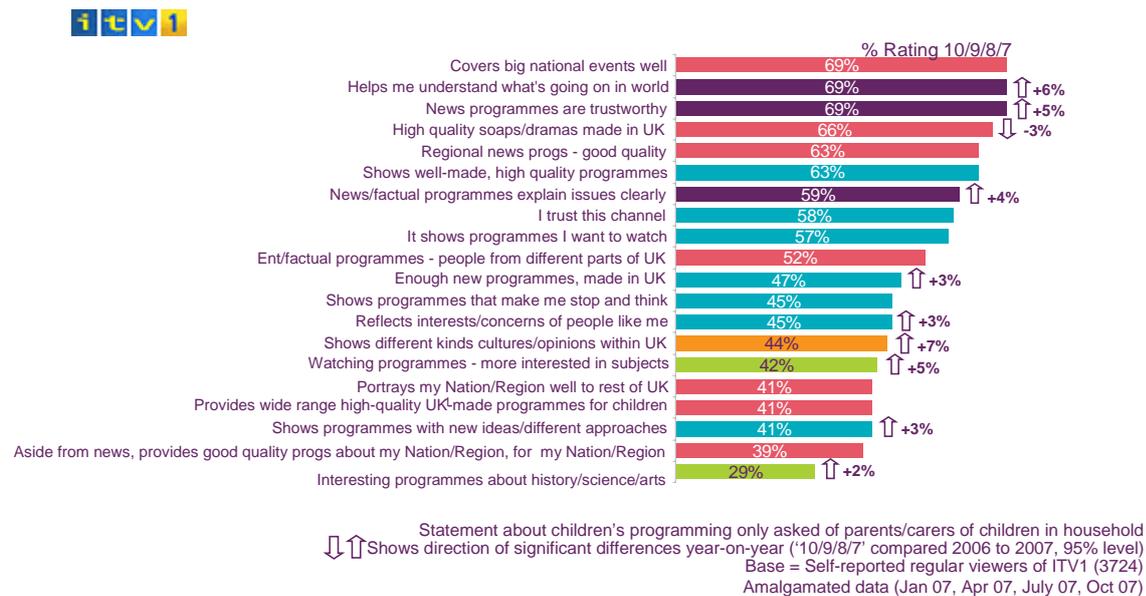
ITV1 is also particularly associated with PSB purpose 1, *informing our understanding of the world*, with 69% saying that *it helps them to understand what is going on in the world*, 69% believing that its News and factual programmes *explain issues clearly* and 59% saying that its News programmes are seen as *trustworthy*,

Of the PSB characteristics, ITV1 is most associated by its regular viewers with programme *quality* (62%), being a channel they *trust* (58%) and having *engaging* programmes (57%).

In a similar manner to the other main PSB channels, regular viewers of ITV1 tended to have a more positive view on the channel in 2007 than in 2006. Like BBC One, there was only one negative shift in opinion (in 2007 66% said that ITV1 has high quality Soaps/Drama that are made in the UK, compared to 69% in 2006).

Across a number of the purposes and characteristics women, and those in socio-economic group DE (compared to ABs) are most likely to have a positive opinion on ITV1 about it *showing programmes they want to watch*. DEs are most likely to rate ITV1's non-News regional output positively, while younger viewers and ABs are least likely to rate the channel positively on its regional News.

Figure 12.4: ITV1 channel summary



Channel 4

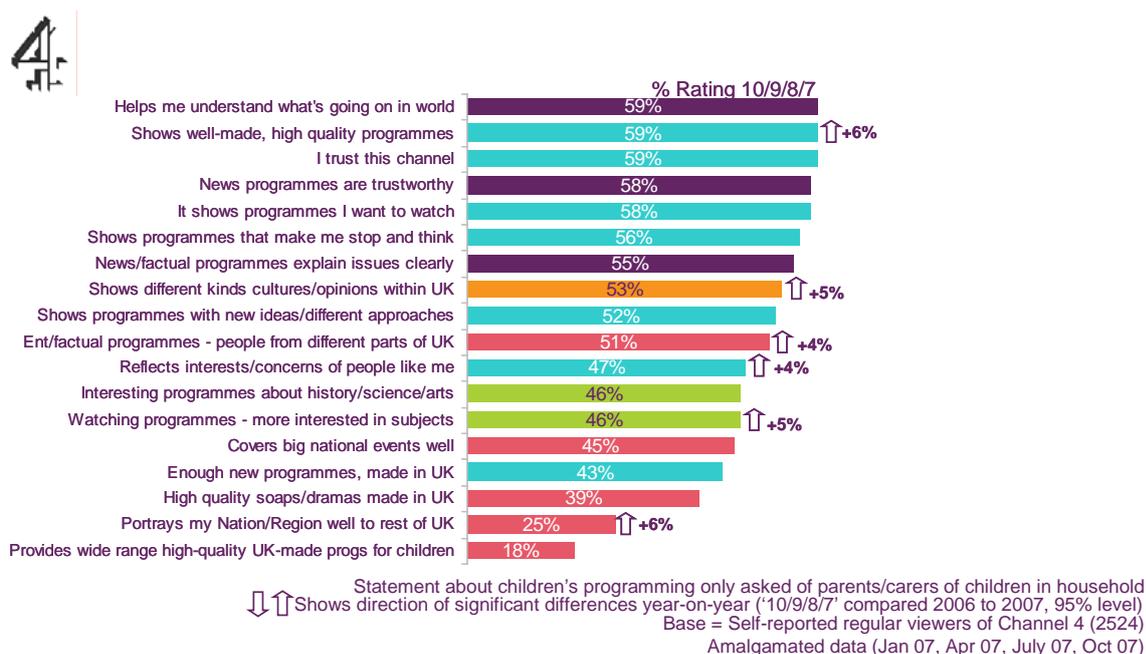
Channel 4's strongest associations for regular viewers tend to relate to PSB purpose 1 and the characteristics (see Figure 12.5). For purpose 1, *helping viewers understand what is going on in the world* (59%) and having news programmes that are *trustworthy* (58%) are mentioned by many respondents. Within the characteristics, having *high-quality* programmes (59%), being a channel they can *trust* (59%), being *engaging* (58%) and having *programmes that make viewers stop and think* are the features of Channel 4 cited most often by regular viewers (56%).

As seen in 2006, Channel 4 scores highly on the two characteristics of being *innovative* and *challenging* and on purpose 4: *representing diversity and alternative viewpoints*. The ranking of these elements within the overall set of statements are higher for Channel 4 than for the other main PSB channels, and can be considered as defining features of the channel.

Regular viewers of Channel 4 had a more positive view on a number of the PSB elements in 2007 than in 2006, although changes were not as marked for this channel as for BBC One, BBC Two and ITV1.

As seen in the *PSB Annual Report* last year, Channel 4's younger viewers are considerably more likely to value the channel on a number of PSB elements, e.g. 71% of its 16-24 regular viewers see it as *having well-made high quality programmes*, 64% feel it is *innovative*, and 66% say that *it makes them stop and think*. People in ethnic minority groups are also more likely to have a particularly positive view of Channel 4 in some areas, e.g. 70% agree that it shows *programmes that viewers want to watch* and 59% rate it well on its Entertainment and Factual programmes *showing people from different parts of the UK*.

Figure 12.5: Channel 4 channel summary



Five

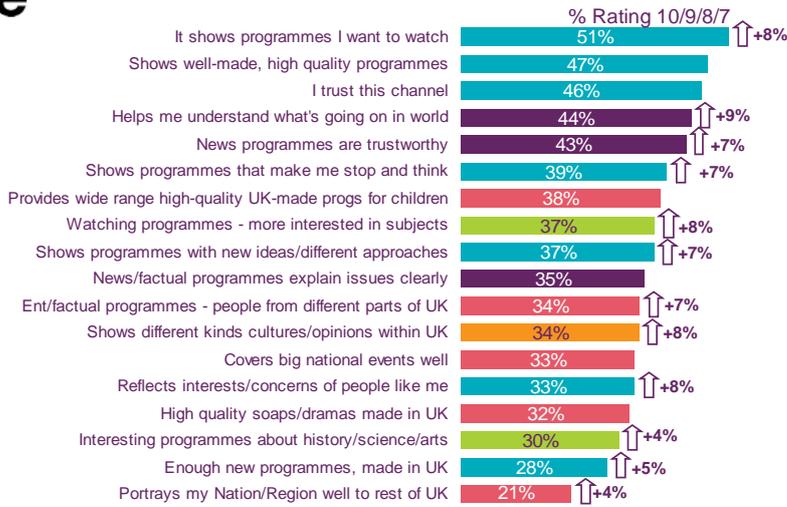
Figure 12.6 shows regular viewers' opinions of Five. Five is characterised by strong associations with particular PSB characteristics and purpose 1 statements, and in some ways has a similar array of strengths to Channel 4 (although the associations are at a lower level). Five's strongest delivery is related to the PSB characteristics of *engaging* programmes (51%), *high-quality* programmes (47%), being a channel they *trust* (46%) and elements relating to purpose 1 and the delivery of News.

Although the actual percentages may be lower for Five than for other channels, it is worth noting that two PSB statements are ranked highest for Five of the main five PSB channels. These relate to the *range and quality of UK-made programmes for children* and also that watching its programmes has *made the viewers more interested in subjects*. Therefore, although Five does not necessarily contribute to PSB more than the other channels in these areas, these can be seen as defining features of the channel.

Younger viewers are somewhat more likely than older viewers to respond positively to Five's delivery of some PSB elements, such as those relating to purpose 1 and News, and in showing *programmes they want to watch*, *high-quality* programmes, and *programmes that make them stop and think*.

Figure 12.6: Five channel summary

five

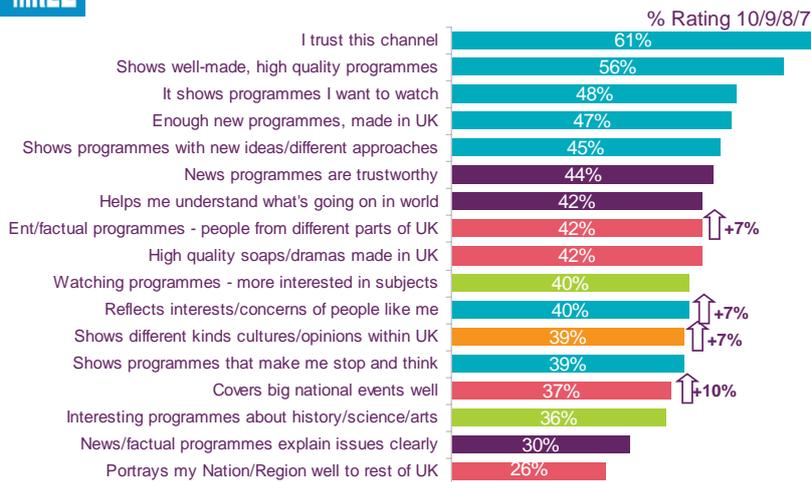


Statement about children's programming only asked of parents/carers of children in household
 ↓↑ Shows direction of significant differences year-on-year ('10/9/8/7' compared 2006 to 2007, 95% level)
 Base = Self-reported regular viewers of five (1405)
 Amalgamated data (Jan 07, Apr 07, July 07, Oct 07)

BBC Three

Regular viewers' opinions of BBC Three show that the channel is particularly associated with PSB characteristics, with 61% saying that they *trust* the channel, 56% rating it on *high-quality* programmes, 48% saying it has *engaging* programmes, 47% appreciating its *original* content and 45% seeing the channel as *innovative* (see Figure 12.7). Base sizes are too small to examine sub-group differences in detail.

Figure 12.7: BBC Three channel summary



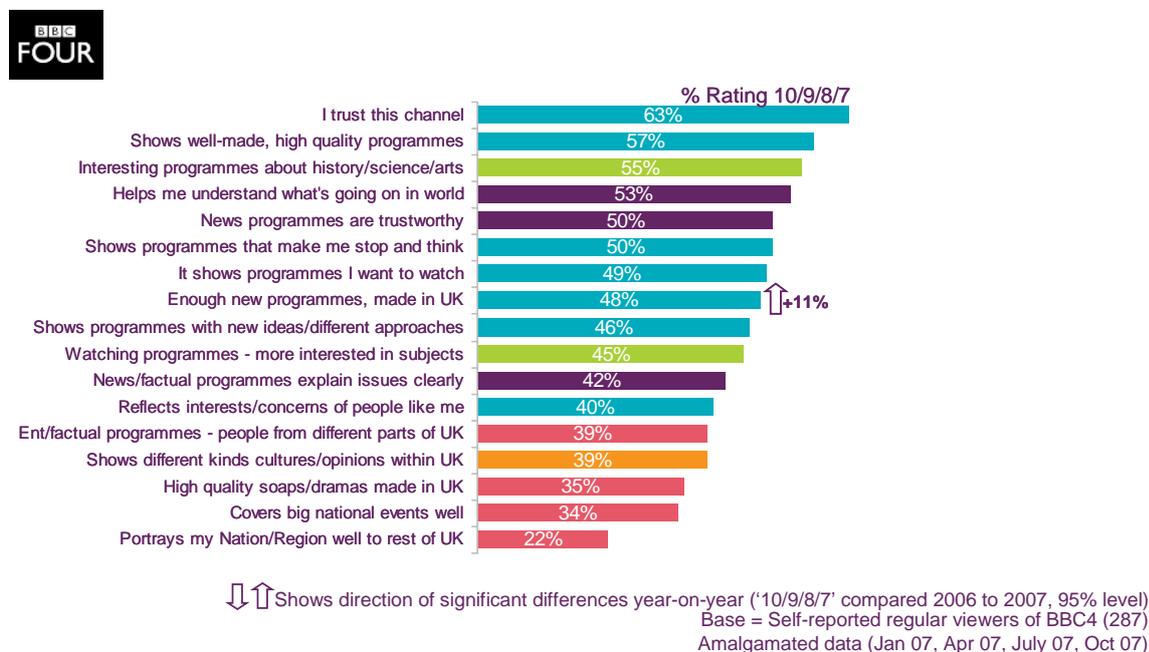
↓↑ Shows direction of significant differences year-on-year ('10/9/8/7' compared 2006 to 2007, 95% level)
 Base = Self-reported regular viewers of BBC3 (476)
 Amalgamated data (Jan 07, Apr 07, July 07, Oct 07)

BBC Four

Regular BBC Four viewers' opinions of the channel are shown in Figure 12.8. Among regular viewers, the channel is most associated with *being a channel that they trust* (63%) showing *high-quality* programmes (57%), showing *interesting programmes about history, science or*

the arts (55%) and *helping viewers to understand what's going on in the world* (53%). As with BBC Three, the figure below shows that the channel is particularly associated with the whole range of PSB characteristics. In particular, the channel is likely to be seen as *having enough new programmes made in the UK*. This has increased by 11%, to 48% in 2007. As with BBC Three, base sizes are not large enough to examine sub-groups in detail.

Figure 12.8: BBC Four channel summary



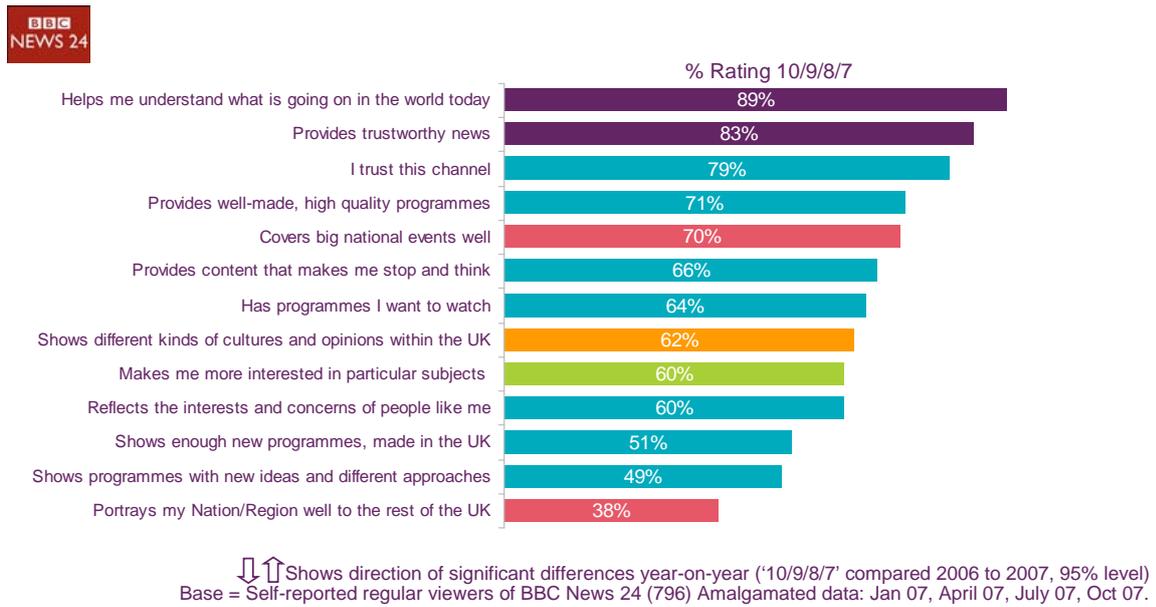
BBC News 24

Regular viewers' opinions of BBC News 24 are shown in Figure 12.9⁶⁹. Among regular viewers, the channel is most associated with the PSB elements related to purpose 1 and news provision; '*It helps me understand what is going on in the world*' (89%) and '*News programmes are trustworthy*' (83%). BBC News 24 also rates very well on other PSB purposes and characteristics and is strongly associated with being *trustworthy* (79%), having *high quality UK-made programmes* (71%) and *covering big national events well* (66%).

Note: This channel specialises in the delivery of News and therefore attracts viewers who are particularly interested in News. This is likely to underpin the strong response to BBC News 24 in comparison to the other more general PSB channels. Annex 2 shows the data for BBC News 24 in comparison with other multichannel channels that also specialise in particular genres, as this provides a more appropriate context for the data.

⁶⁹ Opinions on BBC News 24 were asked only on elements of the PSB purposes and characteristics that were judged to be potentially relevant for a news channel.

Figure 12.9: BBC News 24 channel summary



Section 13

Additional genres

Introduction

This section looks at the genres of Drama and Soap, Sports and Comedy. These genres were reported within purpose 3 in the last *PSB Annual Report*. However, these genres can be seen to work across a number of the purposes and characteristics, in addition to that of purpose 3, and are reported on separately in this section.

Summary findings

Drama & Soaps

Output

- BBC One and ITV1 continue to be the most significant contributors to first-run UK-originated Drama in terms of volume of output. Output has been stable across the years in peak time, although there was a small fall of 15 hours on ITV1 between 2006 and 2007.
- The volume of Soaps has also remained stable over the last five years in peak time on BBC One, ITV1 and Channel 4 (Five's regular Soap, *Family Affairs* ended its run in 2005 and was not replaced with another home-grown Soap).

Viewing

- The trend of decreasing hours of viewing of both UK Drama and UK Soaps since 2003 has not continued in 2007.
- Total annual hours of viewing of UK Drama (including repeats) in 2007 was an average of 80 hours per year for an average viewer, up from 72 hours in 2006. Viewing was evenly split between BBC One and ITV1, although ITV1 has returned to its usual position as the most-watched PSB channel for this genre.
- Viewing of UK Soaps now averages 72 hours in 2007, up from 70 hours in 2006, with BBC One and Channel 4 experiencing small gains in viewer hours.
- Young people watch proportionally less than older age-groups, with Drama accounting for 12% of viewing of 16-24 year olds, compared to 15% for those aged 65+. The reverse is true for Soaps, with younger viewers watching a third more, proportionally, than older viewers.

Sports

Output

- Output figures demonstrate that this genre is volatile and reactive to major sporting events. For example, the 'World Cup effect' can be seen in the overall volume of Sports coverage in peak time in 2006, which increased by 64% compared with 2005 but returned to previous levels the following year.

- However, it is noteworthy that for Five the increase in volume in 2006 was maintained in 2007 because the channel introduced a greater variety of Sports coverage, including cricket, in peak time in 2006, which continued in 2007.

Viewing

- Amounts of yearly Sports viewing also vary considerably according to the particular sporting events and volume of coverage. In 2007, BBC One, BBC Two and ITV1 were watched the most for Sports coverage (24, 16 and 15 hours respectively).

Comedy

Output

- The total volume of Comedy programmes increased by 15% between 2006 and 2007. Within this total, repeats formed the majority of programmes broadcast in the 24-hour schedule – accounting for 83% - most of which were shown on Channel 4 and BBC Three.
- In peak time the balance between channels was more evenly spread, and more Comedy was to be found on BBC Two than any of the other channels. There was also a much lower proportion of repeats in peak time than during the rest of the day, accounting for 54% of Comedy in peak in 2007.
- More first-run original Comedy was available in peak time in 2007; 208 hours, up from 161 hours the year before.

Viewing

- Despite the increases in overall volume of output, average yearly hours of viewing of UK Comedy has reduced from 16 hours in 2003 to 8 hours in 2007.
- Around three-quarters of 2007 viewing was on BBC One. Viewing on both BBC Two and Channel 4 has fallen from the 2006 levels.

13.2 Background

This year we have decided to break the alignment between the genres covered in this section and PSB purpose 3. This allows the section on purpose 3 to examine more broadly the fostering of cultural identity at both regional and national levels, which can arguably be achieved through any genre rather than tying it specifically to Drama, Soaps, Sports and Comedy.

The genres included in this section are listed below:

- Drama and Soaps
- Sports
- Comedy

Structure of this section

We have considered each genre in turn and evaluated them first by output hours and then by audience viewing figures. This section is intended to be a databank for all output and audience viewing analysis relating to the genres listed above.

13.3 UK Drama and Soaps

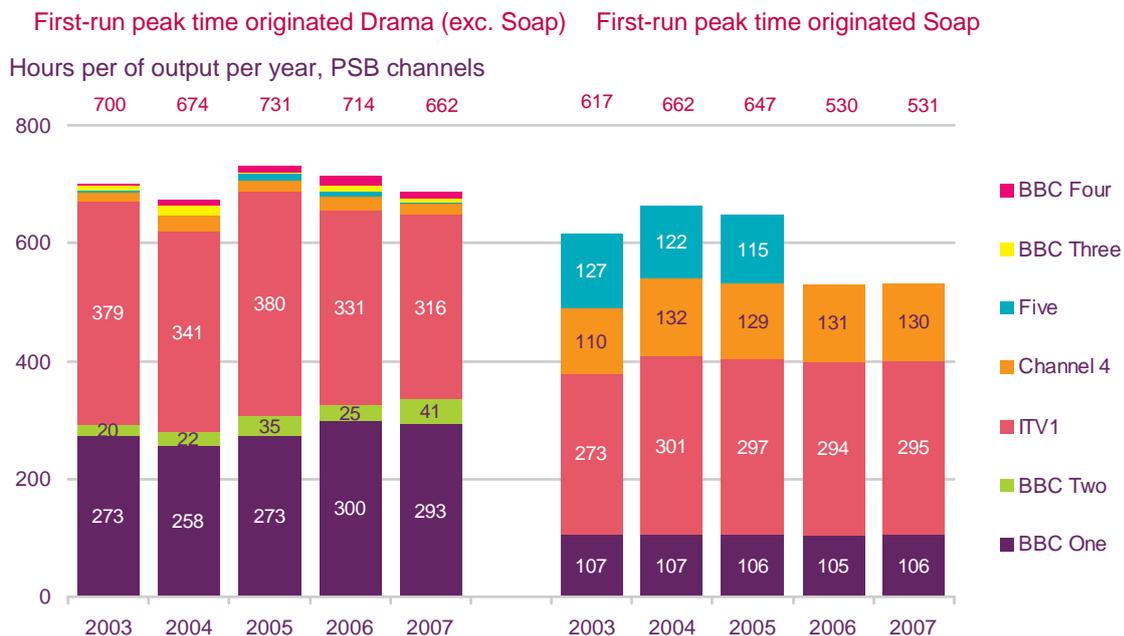
Output hours

Figure 13.1 shows the picture for Drama and Soaps in the peak-time schedules. Only first-run originated programmes are included here – those commissioned and broadcast for the first time from broadcasters' in-house resources or from independent production companies. Repeats and acquisitions are excluded.

Figure 13.1 shows the relative stability of the combined volume of the PSBs first-run originated Drama across the years, although there was a small fall of 15 hours on ITV1 between 2006 and 2007. BBC One and ITV1 are the most significant contributors in the Drama genre in terms of volume of output.

The volume of Soaps has also remained stable over the last five years on BBC One, ITV1 and Channel 4, while Five's regular soap *Family Affairs* ended its run in 2005 and was not replaced with another originated soap.

Figure 13.1: Peak time first-run originated Drama and Soaps output hours, 2003-2007

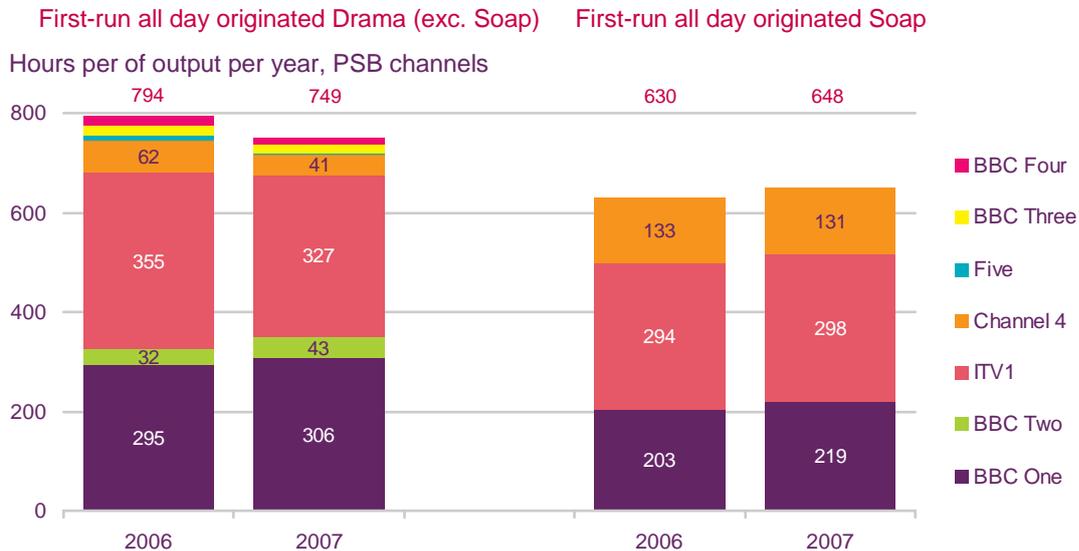


Source: Broadcaster returns

Figure 13.2 shows the same information as above, for the full 24 hours rather than just for peak time. Data for 2006 and 2007 only are available, because the genre definitions used in previous years were different and it is not possible to re-state the historic data to give a consistent five-year trend line.

There was little change between 2006 and 2007. There was a small reduction of 45 hours (6%) in the volume of UK-originated Drama in 2007 and a very slight increase in the number of Soaps.

Figure 13.2: UK Drama and UK Soaps – All channels, all day, first-run originations



Source: Broadcaster returns

Viewing figures

As Figure 13.3 shows, the trend of decreasing hours of viewing of both UK Drama and UK Soaps has not continued in 2007, although levels are not as high as five years ago.

Total annual hours of viewing of UK Drama (including repeats) in 2006 averaged 72 hours per year for an average viewer. In 2007 it was 80 hours. Viewing was evenly split between BBC One and ITV1, although ITV1 has returned to its usual position as the most-watched PSB channel. Relatively little viewing takes place on other channels.

Viewing of UK Soaps averaged 72 hours in 2007, up from 70 hours in 2006, with BBC One and Channel 4 experiencing small gains in viewer hours.

Young people watch proportionally less than older age-groups, with viewing of Drama accounting for 12% of viewing of 16-24 year olds, compared to 15% for those aged 65+. The reverse is true for Soaps, with younger viewers watching a third more, proportionally, than older viewers.

Figure 13.3: Total viewing hours of UK Drama and UK Soaps (main PSB channels only) 2003-2007



Source: BARB 2007

13.4 Sports

Output hours

Sports output is one of the most volatile programme genres, because the amount of time devoted to sports coverage is affected by the sporting calendar and by gains or losses in the bid for sports rights. Volumes will tend to increase or decrease depending on whether the Olympics or World Cup, for example, feature in the particular year, and whether football, rugby or cricket rights are won or lost. Figure 13.4 demonstrates this volatility, showing the increase in volume in 2004 (the Olympics) and in 2006 (the Football World Cup) on most of the PSB channels. The exception was Channel 4, where the number of hours reduced by 25% in 2006 as a result of the loss of cricket rights.

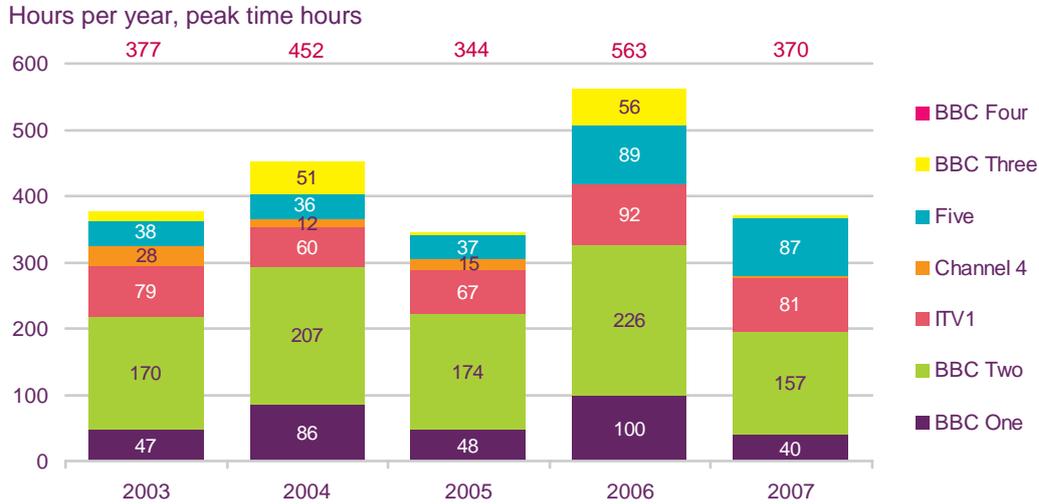
Figure 13.4: Sports output hours, 2003 – 2007



Source: Broadcaster returns

Figure 13.5 demonstrates the ‘World Cup effect’ on the overall volume of sports coverage shown in peak time in 2006, which increased by 64% compared with 2005 but returned to previous levels the following year. However, on Five the increase in volume in 2006 was maintained in 2007 because the channel introduced a greater variety of sports coverage, including cricket, in peak time in 2006, which continued in 2007.

Figure 13.5: Sports output hours, peak time 2003 – 2007

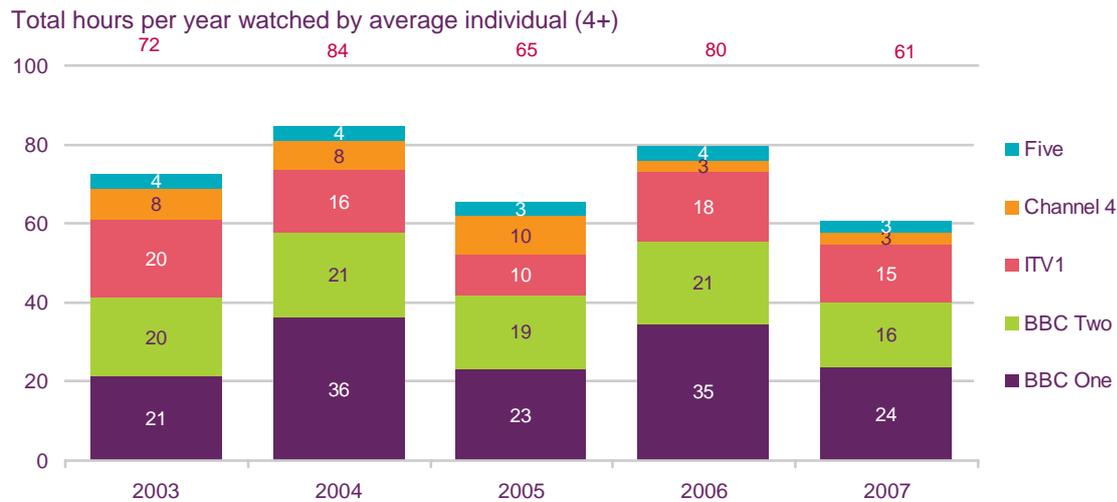


Source: Broadcaster returns

Viewing figures

Figure 13.6 shows the total hours spent viewing Sports on the main PSB channels. Amounts of yearly viewing vary according to the particular sporting events taking place. In 2007, total hours (61) were 19 hours less than the 2006 level, and 23 hours less than the 2004 levels – all years in which a major international football tournament took place. In 2007, BBC One, BBC Two and ITV1 were watched the most (24, 16 and 15 hours respectively).

Figure 13.6: Total viewing hours of Sports (main five channels only) 2003-2007



Source: BARB 2003-2007

13.5 UK comedy

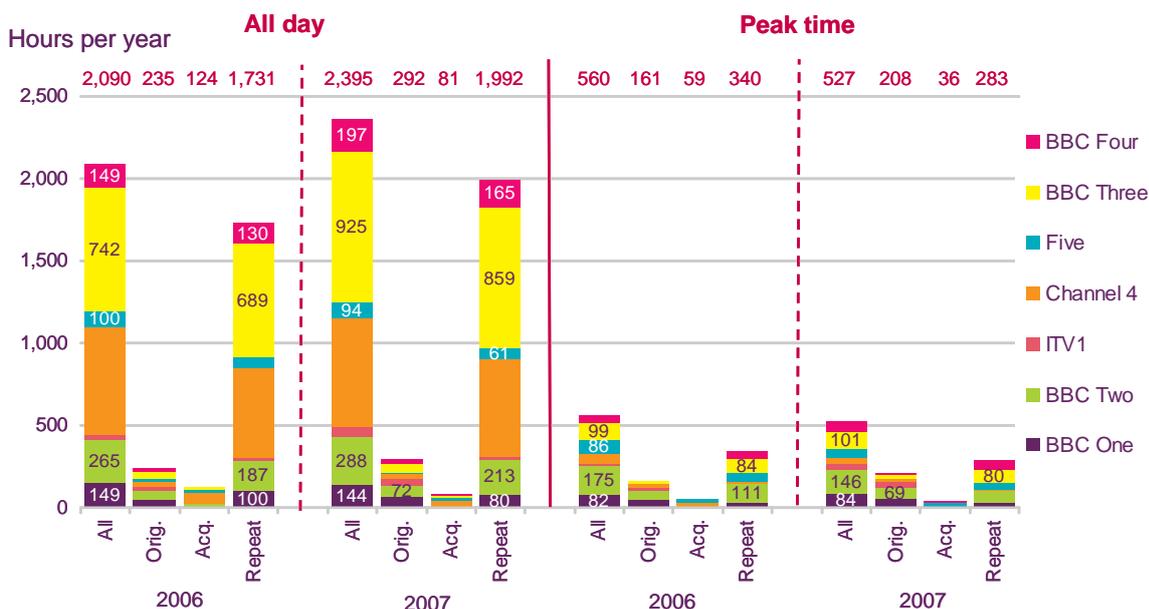
Output hours

Figure 13.7 compares the volumes of Comedy programming – including situation comedy as well as scripted comedy – for all day and peak time in 2006 and 2007. Within these overall totals, the left-hand column in each case shows the volume of all Comedy programmes, whether produced by broadcasters’ in-house teams or commissioned from independent producers (originated), acquired from other sources (acquired) or repeats.

The chart shows that the total volume of Comedy programmes increased by 15% between 2006 and 2007. Within this total, repeats formed the majority of programmes broadcast in the 24-hour schedule, accounting for 83%, most of which were shown on Channel 4 and BBC Three. On Channel 4, US sitcoms such as *Friends* and *Frazier* made up the majority of this output, while on BBC Three, the figures were boosted by a high proportion of repeats of home-produced comedies such as *Two Pints of Lager & A Packet of Crisps*, *Gavin & Stacey* and *Little Britain*.

In peak time the balance between channels was more evenly spread and more comedy was to be found on BBC Two than any of the other channels. There was also a much lower proportion of repeats in peak time than during the rest of the day, accounting for 54% of Comedy in peak time in 2007. More first-run original Comedy was available in peak time in 2007; 208 hours, up from 161 hours the year before.

Figure 13.7: Comedy output – all time and peak time, 2006-2007



Source: Broadcaster Returns

Viewing hours

Average yearly hours of viewing of UK Comedy have reduced from 16 hours in 2003 to 8 hours in 2007 (Figure 13.8). Almost three-quarters of 2007 Comedy viewing was on BBC One. Viewing on BBC Two and Channel 4 has fallen more than 50% from 2006 levels.

Figure 13.8: Total viewing hours of UK Comedy (main five channels only) 2003-2007



Source: BARB 2003 -2007

Audience impact

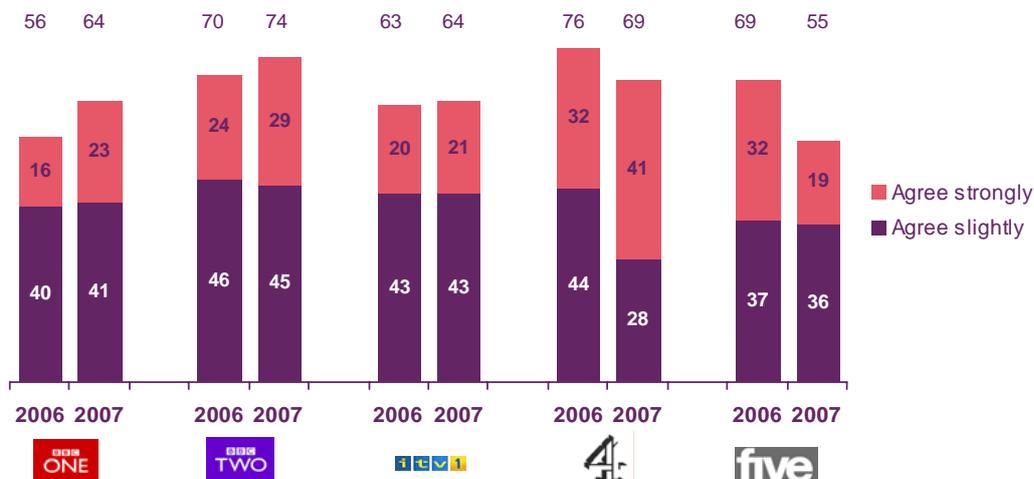
The BBC Pulse survey asked respondents who had watched Comedy programmes (including comedies from other countries, not just the UK) if they agreed with the following statement:

It is the kind of programme I would talk to other people about

In 2006, Channel 4 received the largest proportion of responses saying that the viewers *would talk to other people about* the Comedy programmes watched (76%). In 2007 comedy on BBC Two had become *most likely to be talked about*. Comedy programmes on Five and Channel 4 were not as favourably rated on this dimension in 2007 as they had been in 2006.

Figure 13.9: Pulse survey opinions on Comedy: 'would talk to other people about'

Comedy: "It is the kind of programme I would talk to other people about"
 % saying "Agree strongly/slightly"



Base for all responses to programmes watched in Comedy genre as defined by BDS
 Responses: BBC One 23524, BBC Two 31104, ITV1 4046, Channel 4 34515, Five 1005. 2007, BBC One 39655, BBC Two 33539, ITV1 9957, Channel 4 17915, Five 2623
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006, Jan-Dec 2007

Annex 1

Survey methodologies

Ofcom PSB Tracker

Data collection

The Ofcom PSB Tracker is conducted via telephone interviews (CATI) with adults aged 16+. The first full year of fieldwork was 2006. Fieldwork is conducted each year during four months: January, April, July, and October, chosen to represent the range of the broadcast year. In 2006, a total of around 1,874 interviews were conducted pre quarter (approximately 1070 in England; 268 in Scotland; 268 in Wales; 268 in Northern Ireland). In 2007, a total of around 1,750 interviews were conducted pre quarter (approximately 990 in England; 250 in Scotland; 250 in Wales; 2650 in Northern Ireland). The average interview length was 18 minutes. Fieldwork was conducted by GfK NOP.

The Welsh sample was boosted each quarter (an additional 50 interviews) to ensure a representative sample to report effectively on S4C Welsh language viewers.

Weighting

Quotas were applied and survey data was weighted to be nationally representative of adults 16+. Weights were applied to: Gender, Age, Region, Social grade and Ethnicity using data from mid-2004 population estimates (ONS).

Questionnaire

The main focus of the questionnaire is questions asking respondents to rate specific TV channels on four different aspects of broadcasting (each of the PSB purposes and characteristics – 19 statements in total).

Respondents who regularly watched a channel were asked to rate each of the specified channels (BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three, BBC Four and BBC News 24) separately and also to consider all of the channels together for each of the research statements. Statements on BBC Three, BBC Four and BBC News 24 were only asked of multi-channel households.

They were asked to rate on a 10-point scale the degree to which they felt the statement applied (10 = applies completely; and 1 = does not apply at all) to each channel.

The order of channels was rotated to minimise order bias. Fifty percent of the sample was asked about channels in order A below, and the remaining asked in order B⁷⁰:

- A: BBC One, BBC Two, BBC Three, BBC Four, ITV1, Channel 4, Five, All channels combined

⁷⁰ Randomising the order of all channels was piloted. However, this introduced interview fatigue. In the pilot, statements were both randomised and grouped together by area (e.g. News statements together). It was found that the number of incomplete interviews was lower where statements were grouped together.

- B: ITV1, Channel 4, Five, BBC One, BBC Two, BBC Three, BBC Four, All channels combined

In 2007, respondents were also asked to rate a selection of non-PSB channels and PSB digital portfolio channels if they were regular viewers of these.

Respondents were also asked to rate how important it is that the PSB channels together fulfil the PBS purposes and characteristics. This provides useful context for the data on how the PSB channels are rated on these elements.

Analysis conventions

All of the channel summaries and sub-group analysis was carried out on 'regular' viewers. Regular viewers provide a more informed opinion as they are more involved with the channels, and rely less on potentially out-of-date or unfounded perceptions of the channel. Moreover, including occasional viewers increases the level of "Don't know" responses, thereby reducing the granularity of the insight provided.

The profiles of self-defined regular viewers of the PSB channels are outlined below. This is examined in section 12 of the report.

Figure A1.1: Profile of regular viewers of each channel, 2006 and 2007

		BBC One		BBC Two		ITV1		Channel 4		Five		BBC Three		BBC Four	
		2006	2007	2006	2007	2006	2007	2006	2007	2006	2007	2006	2007	2006	2007
Sex	Male	47	47	54	53	41	↑ 44	46	46	43	40	46	46	53	56
	Female	53	53	46	47	59	↓ 56	54	54	57	60	54	54	47	44
S E group	AB	20	19	24	22	15	16	20	19	12	14	15	15	22	20
	C1C2	50	50	49	47	50	50	51	52	47	47	51	54	49	47
	DE	31	31	28	↑ 32	35	35	29	29	41	39	35	31	28	33
Age	16 – 44	46	46	35	36	46	46	55	54	43	↑ 49	71	72	49	50
	45 – 64	36	↓ 33	40	38	35	34	30	29	27	33	20	17	35	32
	65+	18	↑ 20	25	27	19	20	15	16	20	18	9	11	16	17
TV	DTT only	21	21	26	24	21	20	22	20	21	↓ 17	0	0	0	0
	Digital TV	76	77	72	74	76	↑ 78	76	78	76	↑ 81	100	100	100	100
	Freeview	28	↑ 32	33	↑ 36	27	↑ 30	31	↑ 32	32	↑ 38	40	40	47	48
	Cab/sat	50	↓ 48	41	41	52	50	47	47	46	45	64	64	55	56

Source: PSB Tracker, GfK NOP Media, Oct 2006 - 2007. ↑ Shows direction of significant differences year-on-year at 99% confidence level
↓ Shows direction of significant differences year-on-year at 95% confidence level

Base = Self-reported regular viewers of each channel. Unweighted data. BBC1, 06 = 5213, 07 = 4896. BBC2, 06 = 2432, 07 = 2371. ITV1, 06 = 3987, 07 = 3694. C4, 06 = 2816, 07 = 2619. Five, 06 = 1481, 07 = 1423. BBC3, 06 = 533, 07 = 506. BBC4, 06 = 236, 07 = 303. Amalgamated data (Jan 07, Apr 07, July 07, Oct 07). Don't knows/not recorded are not shown here, therefore %s do not always add to 100%.

Reporting conventions

Viewers were asked to rate each channel (and the channels taken together) out of 10, and the top four scores (7-10) were used to calculate responses, correlating to a very/quite response. Throughout the report this is expressed as the channel is "associated with...", "rated well upon..." or "rated positively on..."

1.1 Broadcaster output data

Genre definitions

The output data in this report are collected by Ofcom from the broadcasters each year, as part of their PSB returns. In 2006 figures include some different programme classifications to previous years, and so totals for certain genres may be slightly different from earlier reported figures.

Outlined below are the definitions used for the data in this report:

News

- Newscast or news bulletin providing national, international or regional news coverage.
- News magazines which may contain a range of items related to news stories, with comment and elements of general interest.
- Coverage of parliamentary proceedings and political coverage.
- Weather forecasts and bulletins, including reports on air quality, tide times etc.

Current Affairs

- A programme which contains explanation and analysis of current events and issues, including material dealing with political or industrial controversy or with public policy.
- Topical programmes about business matters and financial issues which are of current interest.
- Political debates, ministerial statements, party conferences.

Arts & Classical Music

- A programme displaying or presenting a cultural or artistic performance or event.
- Programmes providing information, comment or critical appraisal of the arts.
- The subject matter can cover theatre, opera, music, dance, cinema, visual arts, photography, architecture and literature.

Religious

- All forms of programming whose main focus is religious belief, for example, programmes intended to provide religious inspiration through words and/or music, and informational programmes explaining doctrine, belief, faith, tenets, religious experiences or topics providing a religious world view.
- Coverage of religious acts of worship of all faiths.
- Life Experience: Moral, Ethical, Spiritual - exploring one or more of the following issues at some point in the programme: (i) a recognisable religious perspective forming a significant part of the overall narrative; (ii) an exploration of people's daily lives whose attitudes could be said to be informed by a religious background or

tradition; (iii) an exploration of people's perception of, and attitudes to, philosophies which address the big questions of life that affect them. These must demonstrate an approach that bears in mind a religious faith/belief context.

Education

- Programmes with a clear educational purpose, usually backed by specially prepared literature publicised on screen and in other appropriate ways. Includes programmes for Schools, BBC Learning Zone and Open University programmes.
- Programmes reflecting social needs and promoting individual or community action. Also includes Campaign weeks on particular subjects, for example bullying, drugs.

General Factual

- All types of factual programmes, included in the genres listed below.

Specialist Factual

- History - programmes about historical times or events, including programmes about archaeology
- Nature & Wildlife - natural history and programmes about environmental issues.
- Science & Technology - programmes about scientific issues, new discoveries, medical matters and new technological developments

Other Factual

- General factual programmes, including consumer affairs.
- Lifestyle programmes, hobbies and leisure interests, including makeover shows.
- Daytime magazine programmes and talk shows
- Coverage of special events, not generated by the broadcaster, including commemorative events, royal events.

Factual Entertainment

- Popular factual material, including reality shows, docusoaps and other factual entertainment.

Drama

- All drama including comedy drama and TV movies but excluding soaps which are classified separately.
- Docu-drama - based on reality, telling the story of actual events.

Soaps

- Drama programmes with a continuous storyline and fixed cast, normally with more than one episode each week and shown every week of the year and usually (but not necessarily) of 30 minutes duration.

Films

- All feature films that have had a prior theatrical release including films commissioned by the broadcaster.

Entertainment

- All forms of entertainment programme, including panel games, chat & variety shows, talent contests
- Quiz and game shows
- Pop music video shows
- Contemporary music - coverage of popular music events and performances, such as OB concerts or as-live studio based shows.

Comedy

- All forms of scripted comedy, satire, stand-up, and sketch shows
- Situation comedy - dramatised entertainment in a humorous style, usually with a fixed cast and generally of 30 minutes' duration.

Sport

- All forms of sports programming including coverage of sporting events.

Children's

- All types of programmes designed for a children's audience, including:
- Drama
- Entertainment shows, including weekend magazines and animations and cartoons, including puppets which are designed for a children's audience.
- General information programmes and News for children.
- Education and factual programmes for pre-school children.

BBC-GfK Pulse Survey

Methodology

This report includes data from the BBC Pulse survey – an online, nationally-representative panel survey of 15,000 viewers (including Northern Ireland, Scotland, Wales and England), conducted on behalf of the BBC by GfK NOP.

Panellists are presented with the previous day's schedules for all the terrestrial channels plus BBC Three, BBC Four, E4 and Sky One, and S4C in Wales. Once they have selected the programmes they viewed they are asked a number of questions about them. Some questions are specific to the BDS (Broadcasting Dataservices) genre into which a programme falls, some are cross-genre questions (e.g. on appreciation) and there are also sometimes panellists are asked additional programme-specific questions dependent on the research needs of the BBC.

The panel is not informed that the survey is conducted on behalf of the BBC to avoid influencing answers, and the survey is presented with GfK branding. The Pulse survey is also carried out online and therefore represents the opinions of online users, but demographically representative of the UK population.

Analysis considerations

Panellists score only those programmes that they have watched for at least five minutes; generally they will be scoring programmes that they have chosen to watch. As such, average scores are relatively high, and lower scores in the Pulse survey are likely to represent strong dissatisfaction. In this report, ratings are aggregated into genre-level summaries.

It should also be noted that results are calculated on the basis of the number of responses, not respondents. In this way, multiple responses to a programme over a period of time from the same respondent are registered. This means that for any given rating, it is not possible to extrapolate views of the population as a whole. The rating provides an indication of the strength of opinion about a particular programme. Over 5,000 responses are collected each day.

This methodology is useful when looking at Pulse scores overall, as it can be considered that the opinions of dedicated viewers may greatly influence the rating. Therefore the rating and number of responses represents both a score for the programme and for its popularity. For example, if a programme has a high number of responses and a high score, this shows that lots of people watched the programme and liked it. A programme with fewer responses and the same high score, would suggest that not as many people watched it, but those that did liked it.

Genre classification

In the Pulse survey, programmes are aggregated by genre lists in accordance with Broadcasting Dataservices' (BDS) classifications. This differs from BARB and broadcaster returns' genre classification. Genres are not, therefore, directly comparable.

The BDS Serious Factual genre was amended by Ofcom to more closely fit the BARB and broadcaster returns' classifications.

Annex 2

Selected non-PSB channels' and PSB portfolio channels' contributions to PSB

Introduction

Viewers' perceptions on selected non-PSB digital TV channels and PSB digital portfolio channels have been included in the *PSB Annual Report* for the first time and are the focus of this annex⁷¹.

These data are from the Ofcom PSB Tracking survey and are reported in order to provide useful context to the results relating to the PSB channels. This is especially important as digital TV continues to grow in the UK (see section 1 of this report) and also because the scope of the second review of PSB is extended to assess the potential for other broadcasters, other institutions and the wider set of electronic communications services to contribute to public purposes.

However, it should be noted that the main PSB channels are mixed-genre channels with a number of different PSB remits, while the other channels are often single-genre and face different commercial pressures. Channels other than the main five channels may also have smaller, but with more loyal audiences. This needs to be borne in mind when making comparisons between these two different types of service; they are not directly comparable.

Summary findings

- Across many of the elements of the purposes and characteristics, UK TV History, Sky News, the Discovery Channel and BBC News 24 were rated by their regular viewers equally positively, or more so, than the strongest non-digital PSB channel in these areas.
- All of the non-PSB multichannels asked about were also judged to be have *engaging* content by as many of, or more of, their regular viewers than the PSB channels (in terms of having *programmes that people want to watch*).
- It is only in purpose 3 – *reflecting UK culture* and showing *high quality* UK Soaps and Drama that main PSB channels were likely to gain more regular viewers rating the channels positively. ITV2 comes closest to the leaders, BBC One and ITV1, on this aspect.
- The highest-rated PSB channels were on a par with UKTV History and Discovery in their *positive portrayal of the regions/nations* and *showing people from around the UK* in their Entertainment and Factual programmes, again both elements of purpose 3.
- Another area where the non-PSB channels did not necessarily dominate was original UK production; Discovery, UKTV History and Sky News were all rated similarly highly by their regular viewers as were BBC One, BBC Two and BBC News 24.

⁷¹ Data on multichannel viewing is included in more depth in section 2 of this report.

Background

As mentioned previously, we focus on viewers' perceptions of selected non-PSB digital TV channels and PSB digital portfolio channels, in order to provide useful context to the main PSB channels.

We consider each purpose and characteristic in turn for selected multichannel channels (these selected non-PSB channels were incorporated into the PSB Tracker in 2007).

As with the main PSB channels, the audience impact of the other channels was collected using the PSB Tracker survey. From July 2007 onwards, respondents in multichannel households were asked to rate some of the digital channels that they watched. These channels were chosen to provide a range of data across channels which are either linked to PSB channels, may be thought of as competing with particular PSB channels, or are of potential interest due to the genre they focus upon or the demographic they attract.

Note on findings

The findings in this annex should be viewed as indicative rather than conclusive, because the analyses of the PSB channels and the non-PSB channels/PSB digital portfolio channels are not directly comparable:

- Most non-PSB channels broadcast specific genres of programming, whereas main PSB channels show a mixed schedule. PSB portfolio channels also tend to focus on specific types of programmes, or programmes that attract a particular demographic. Such specialist channels may have smaller audiences but are more likely to have regular viewers who are particularly interested in the specific genre. It is logical, therefore, that they may have more satisfied viewers because of these viewers' stronger affinity for the genre and because they chose to watch the specialist channel.
- Self-defined regular viewers are likely to rate a channel highly, especially if they pay subscription fees to watch a channel.
- While it is tempting to talk about the channels other than the main PSB channels as a group, the channels selected for this analysis are only a sub-set of a wide array of digital channels - hence we paint an indicative picture only.
- Although we are measuring channels against the purposes and characteristics, channels other than the main PSB channels do not necessarily set out to deliver against these, and face additional commercial pressures.
- The base sizes for some channels are relatively low and therefore results are indicative only.

Audience impact

Purpose 1: informing our understanding of the world

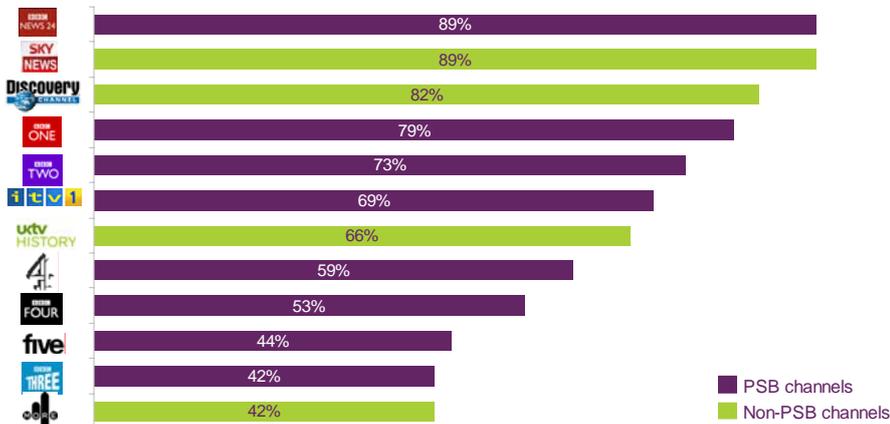
The specialist channels, BBC News 24, Sky News and Discovery, were most likely to be seen as *helping viewers to understand what is going on with the world*; around nine in ten regular viewers of BBC News 24 and Sky News associated this statement with these channels, as did eight in ten of regular viewers of Discovery (see Figure A2.1).

The general PSB channels BBC One, BBC Two and ITV1 were less associated with this PSB element, although a high proportion of regular viewers of these channels did see them performing well in this area.

Figure A2.1: PSB and other channels: *informing our understanding of the world*

Its programmes help me understand what's going on in the world today

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



Base for 'all PSB channels': All respondents, 6918

Base for individual channels: Self-reported regular viewers of each channel: (amalgamated data: Jan 07, April 07, July 07, Oct 07)

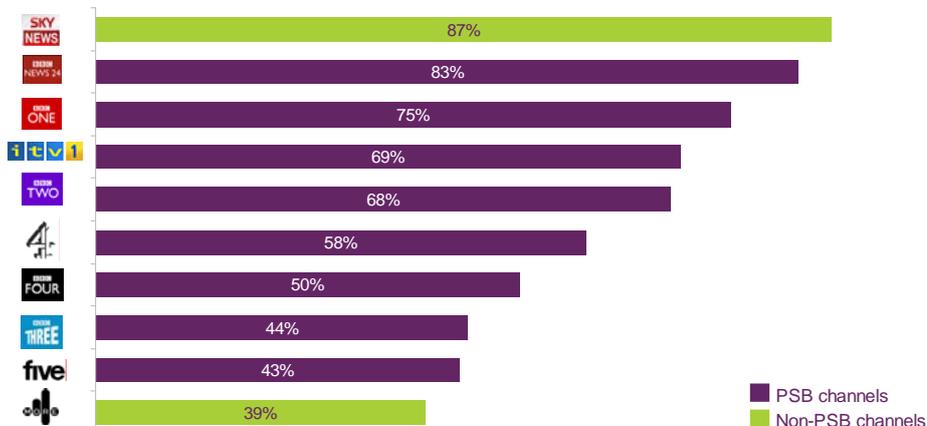
BBC1 = 4906, BBC2 = 2360, ITV1 = 3669, Channel 4 = 2473, five = 1384, BBC3 = 469, BBC4 = 284, BBC News 24 = 796; (amalgamated data: July 07, Oct 07) More4 = 134, UKTV History = 311, Sky News = 343, Discovery Channel = 196

Figure A2.2 shows how *trustworthy* news programmes are thought to be by regular viewers. Sky News, BBC News 24 and Discovery were seen as *trustworthy* by over 80% of their regular viewers. Although it is not shown on the chart, it should be noted that for the channels that were not overtly associated with *trustworthy* news programmes, there was little active distrust of the channels; viewers were simply more likely to say that they did not have an opinion of the channel on this, presumably because they were watching these mixed-genre channels for programmes other than news.

Figure A2.2: PSB and other channels: *its news programmes are trustworthy*

Its news programmes are trustworthy

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel: (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 796; (amalgamated data: July 07, Oct 07) More4 = 134, Sky News = 343

Purpose 2: stimulating knowledge and learning

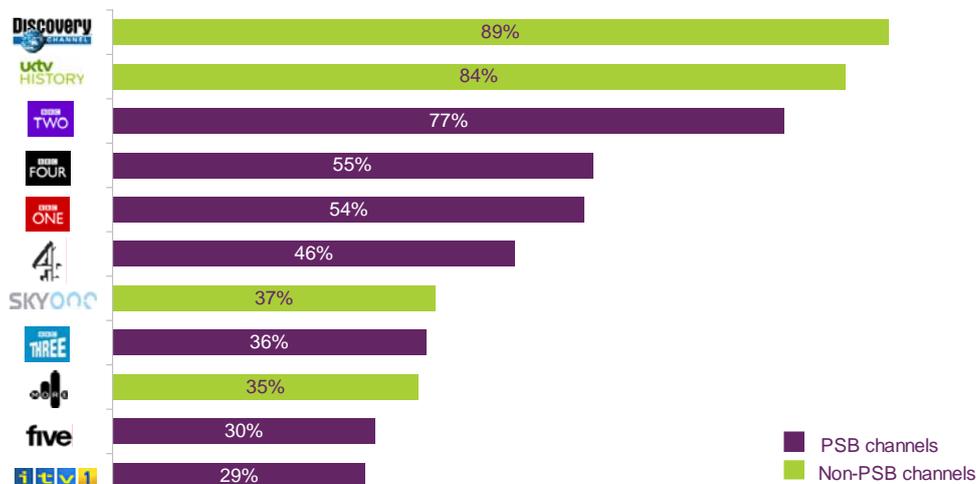
Audience impact

Within the PSB channels, BBC Two had particular strength in *showing interesting programmes about history, science and the arts*. As Figure 5 shows, the specialist channels Discovery and UKTV History were also positively rated by their regular viewers in this area, more so than BBC Two.

Figure A2.3: PSB and other channels: *interesting history, science and arts programmes*

It shows interesting programmes about history, science or the arts

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



Base for 'all PSB channels': All respondents, 6918

Base for individual channels: Self-reported regular viewers of each channel: (amalgamated data: Jan 07, April 07, July 07, Oct 07)

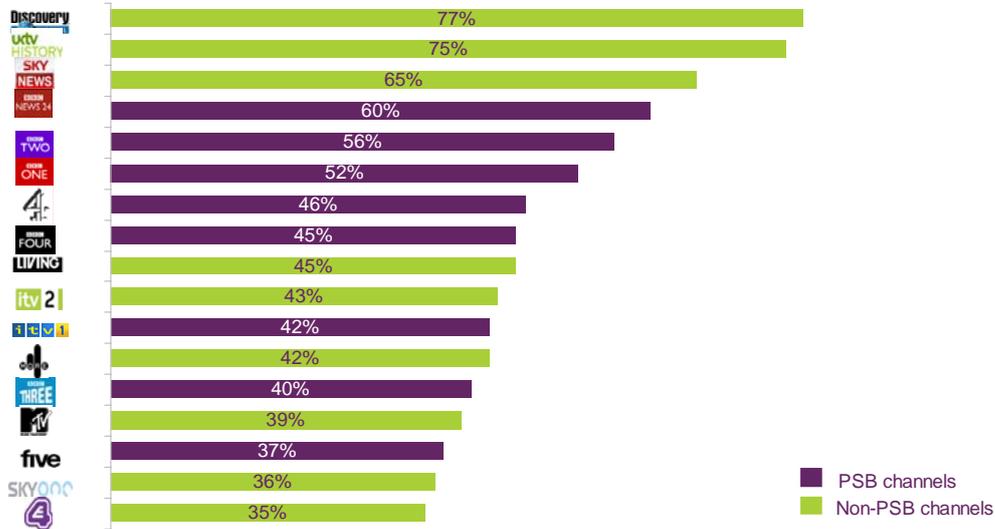
BBC1 = 4906, BBC2 = 2360, ITV1 = 3669, Channel 4 = 2473, five = 1384, BBC3 = 469, BBC4 = 284; (amalgamated data: July 07, Oct 07)
More4 = 134, UKTV History = 311, Sky One = 327, Discovery Channel = 196

Figure A2.4 shows that the specialist multichannels, Discovery, UKTV History and Sky News, were more likely than the PSB channels to be rated positively in terms of *encouraging their regular viewers' interest in a subject*. As mentioned before, regular viewers are likely to choose the channel due to their interest in a particular area. They may, therefore, also be more likely to develop further their interest in the specific area.

Figure A2.4: PSB and other channels: *stimulating learning*

As a result of watching its programmes I've become more interested in particular subjects

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



Base for 'all PSB channels': All respondents, 6918

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4906, BBC2 = 2360, ITV1 = 3669, Channel 4 = 2473, five = 1384, BBC3 = 469, BBC4 = 284, BBC News 24 = 796, ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Sky One = 327, Sky News = 343, Discovery Channel = 196, MTV = 106, Living = 136.

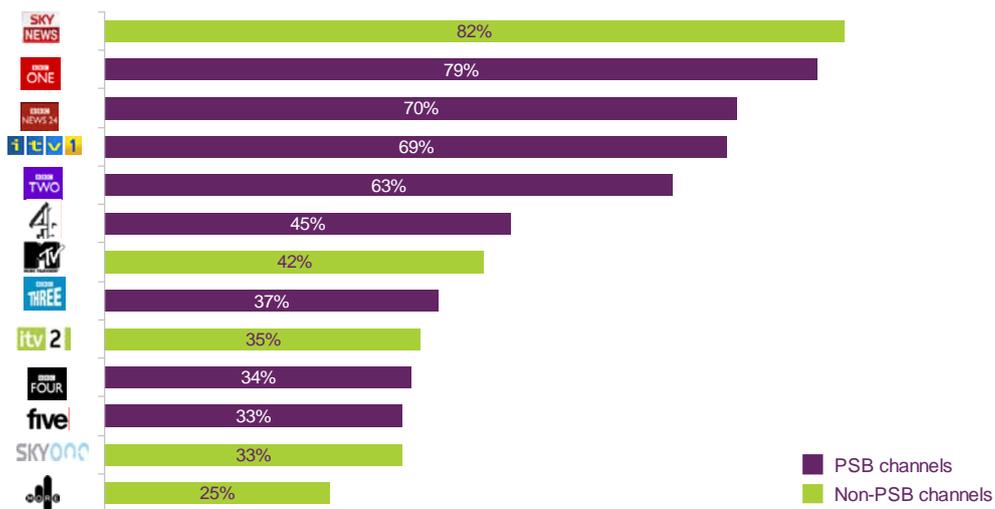
Purpose 3: reflecting UK cultural identity

Figure A2.5 shows that Sky News was perceived by 82% of its regular viewers to cover *big events well*; this is at a similar level to BBC One, the PSB channel that is most likely to be associated with this element of PSB.

Figure A2.5: PSB and other channels: *it covers big, national events well*

It covers big, national events well, like sports, music events or major news stories

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel: (amalgamated data: Jan 07, April 07, July 07, Oct 07)

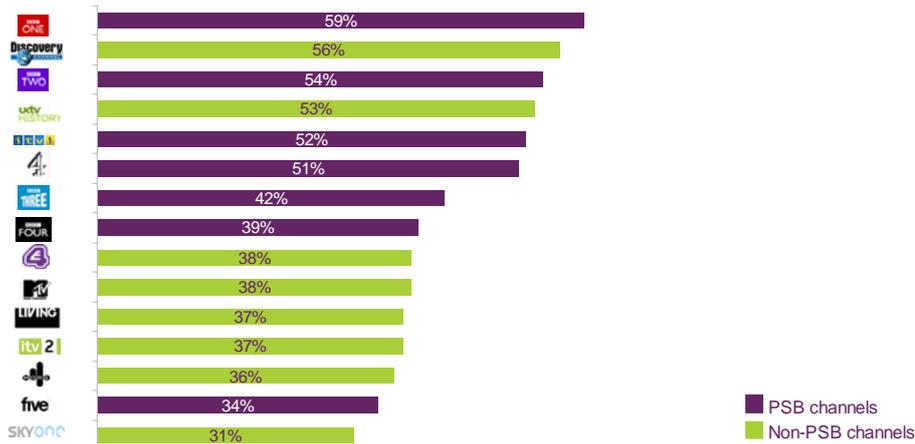
BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 796; (amalgamated data: July 07, Oct 07) ITV2 = 277, More4 = 134, Sky One = 327, Sky News = 343, MTV = 106

As Figure A2.6 shows, UKTV History and BBC One were most likely to be perceived as including people from different parts of the UK in their programmes. UKTV History was seen to do this at a similar level to BBC Two, ITV1 and Channel 4 – all rated well by just over 50% of their regular viewers.

Figure A2.6: PSB and other channels: its programmes show people from different parts of the UK

Its entertainment and factual programmes show people from different parts of the UK

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

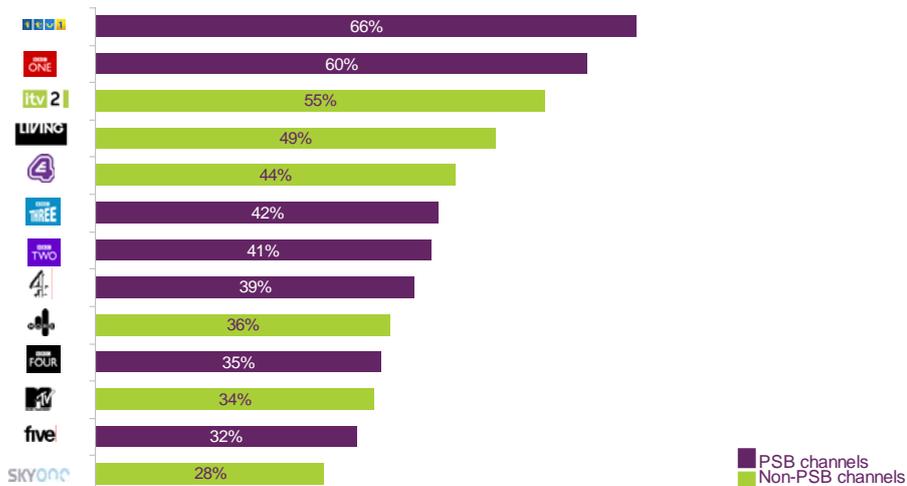
BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Skv One = 327, Discovery Channel = 196, MTV = 106, Living = 136.

Figure A2.7 shows the proportions of regular viewers of each channel that rated each channel positively on its provision of high quality Soaps or Drama made in the UK. Even in the context of specialist multichannels, ITV1 and BBC One still had more regular viewers that associated the channel with this purpose. ITV2, the PSB portfolio channel, competes most strongly with ITV1 and BBC One in this area. More regular viewers of E4 rate the channel well on the delivery of Soaps and Drama, than regular viewers of Channel 4.

Figure A2.7: PSB and other channels: high quality Soaps or Drama made in the UK

It shows high quality soaps or dramas made in the UK

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



Base for 'all PSB channels': All respondents, 6918

Base for individual channels: Self-reported regular viewers of each channel: (amalgamated data: Jan 07, April 07, July 07, Oct 07)

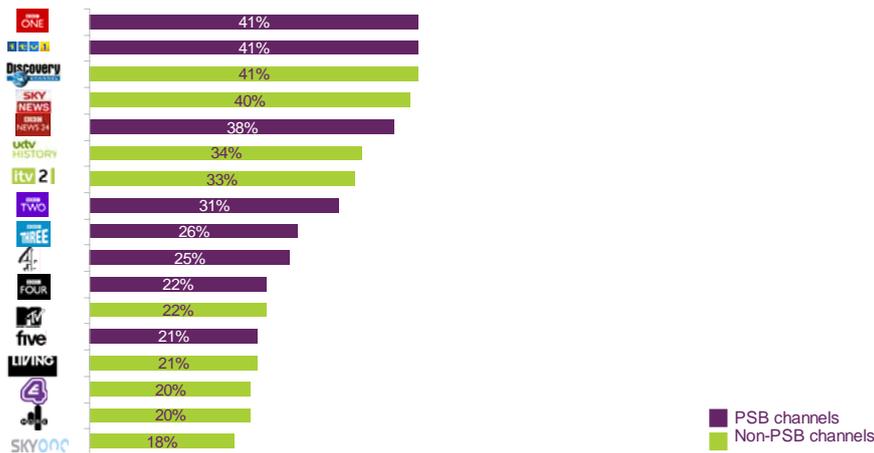
BBC1 = 4906, BBC2 = 2360, ITV1 = 3669, Channel 4 = 2473, five = 1384, BBC3 = 469, BBC4 = 284; (amalgamated data: July 07, Oct 07) ITV2 = 277, E4 = 418, More4 = 134, Skv One = 327, MTV = 106, Living = 136.

Two of the main PSB channels, BBC One and ITV1, compete with Discovery and Sky News in terms of which was most likely to be seen to give a positive portrayal of the viewers' geographical area (between 40% and 41% rated each of the channels highly on this purpose).

Figure A2.8: PSB and other channels: *It portrays my region / nation well to the rest of the UK*

It portrays my region / nation well to the rest of the UK

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 533, ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Sky One = 327, Sky News = 343, Discovery Channel = 196, MTV = 106, Living = 136.

Note: Statement was changed in 2007 so that respondents in Scotland/Wales/NI were asked about 'nation', rather than region

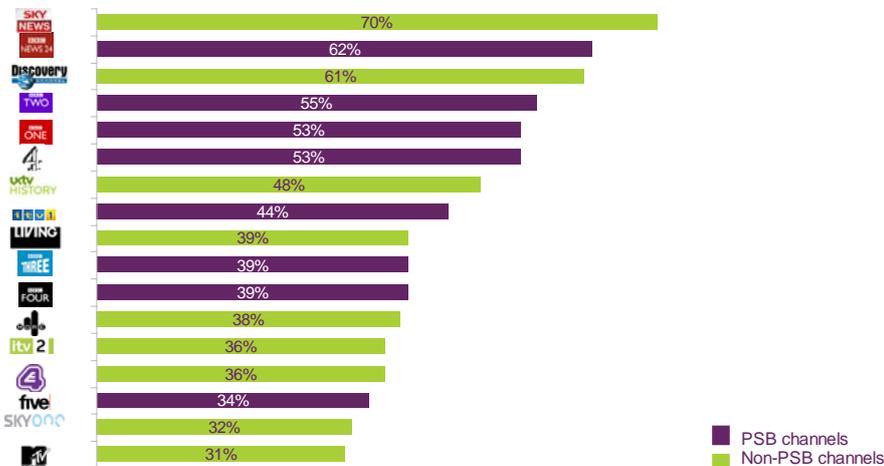
Purpose 4: representing diversity and alternative viewpoints

As Figure A2.9 shows, Sky News, Discovery and BBC News 24 were the top three channels in terms of the percentage of regular viewers that saw them as showing *different kinds of cultures and opinions within the UK*.

Figure A2.9: PSB and other channels: *representing diversity and alternative viewpoints*

Its programmes show different kinds of cultures and opinions within the UK

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 796, ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Sky One = 327, Sky News = 343, Discovery Channel = 196, MTV = 106, Living = 136.

Characteristics: quality

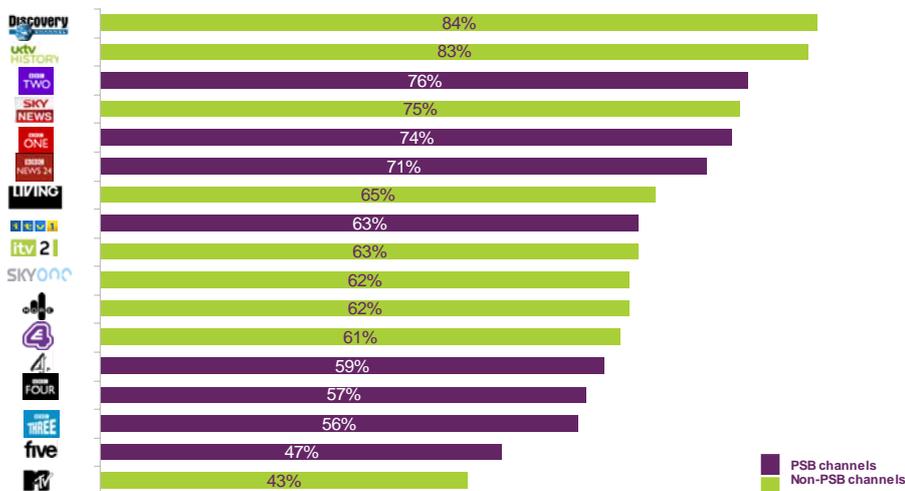
Figure A2.10 identifies that Discovery and UK TV History had the highest levels of satisfaction with the *quality* of the programmes shown, with over 80% of regular viewers rating them positively on this. Satisfaction with this characteristic for Sky News was at a similar level to the leading PSB channels BBC News 24, BBC One and BBC Two.

With the exception of MTV, there were strong scores across all of the specialist multichannels researched on the *quality* of the programming, with over 50% of all their regular viewers rating them well on this.

Figure A2.10: PSB and other channels: *well-made, high quality programmes*

It shows well-made, high quality programmes

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 796, ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Sky One = 327, Sky News = 343, Discovery Channel = 196, MTV = 106, Living = 136.

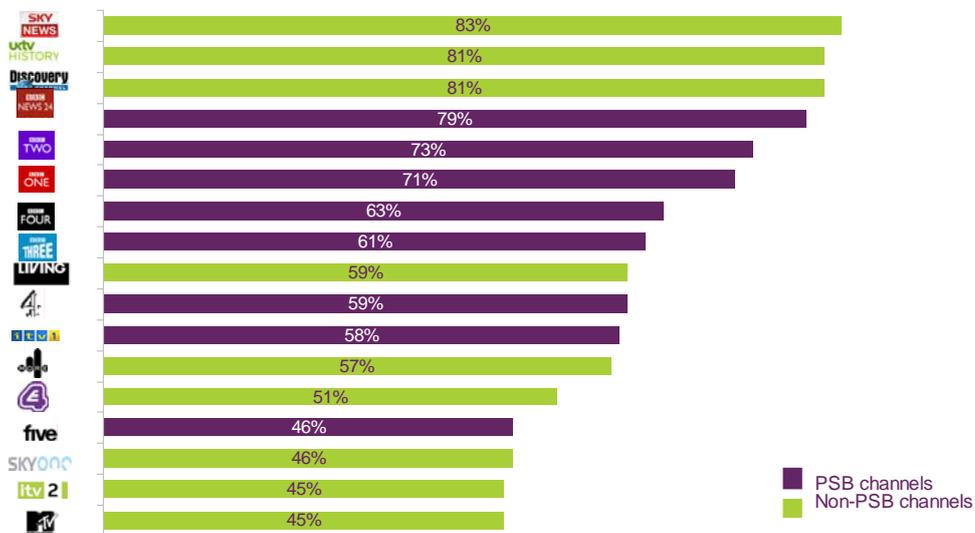
Characteristics: trust

In terms of *trustworthiness* of channels, Discovery, UKTV History and Sky News were all rated *trustworthy* by a higher proportion of their regular viewers than any of the PSB channels. Sky One, MTV, ITV2 were seen as *trustworthy* by a lower proportion of their regular viewers, at a similar level to Five.

Figure A2.11: PSB and other channels: *trust*

I trust this channel

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



Base for 'all PSB channels': All respondents, 1809

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

BBC1 = 1215, BBC2 = 595, ITV1 = 900, Channel 4 = 613, five = 337, BBC3 = 110, BBC4 = 70*, BBC News 24 = 286, ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Sky One = 327, Sky News = 343, Discovery Channel = 196, MTV = 106, Living = 136

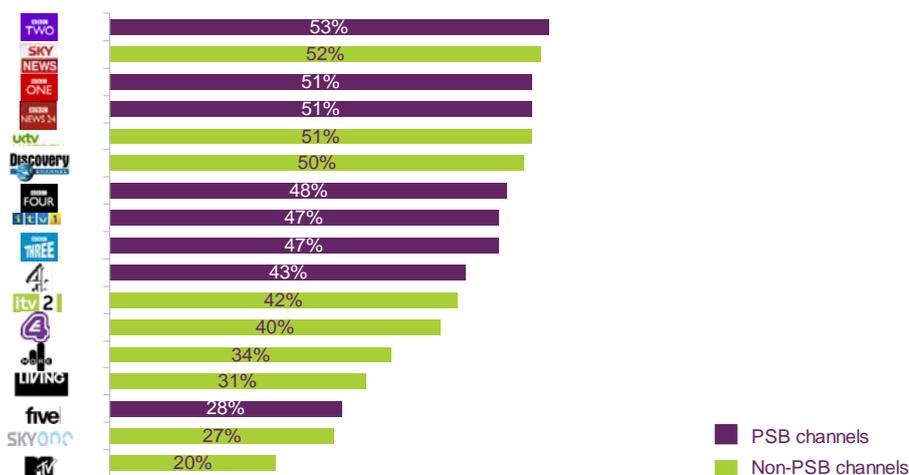
Characteristics: original

Figure A2.12 shows that in terms of *original UK production*, Discovery, UKTV History and Sky News were all rated similarly highly by their regular viewers to BBC One, BBC Two and BBC News 24 (all around 50%). More4 and Sky One were not rated particularly well on this characteristic by their regular viewers.

Figure A2.12: PSB and other channels: *it shows enough new programmes, made in the UK*

It shows enough new programmes, made in the UK

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 533, ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Sky One = 327, Sky News = 343, Discovery Channel = 196, MTV = 106, Living = 136.

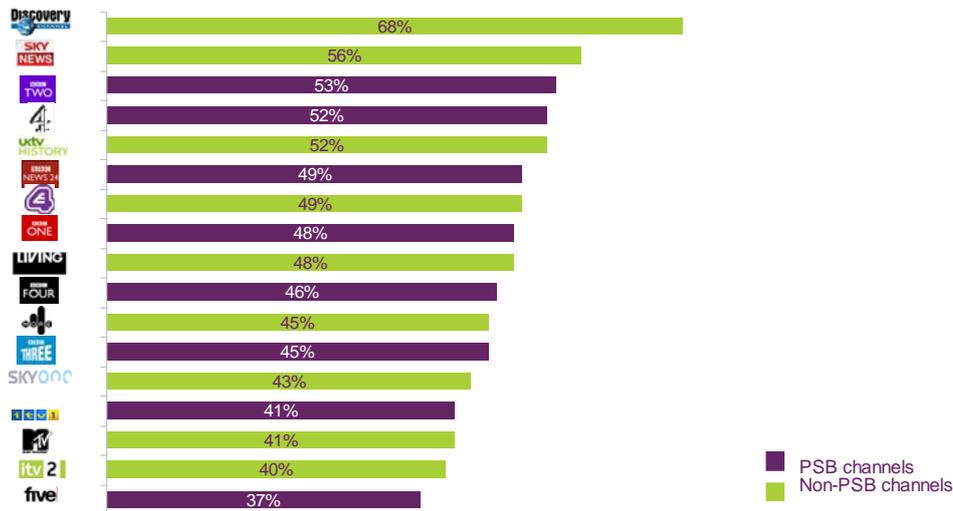
Characteristics: innovation

Discovery was rated well upon *innovation* and *showing programmes with new ideas and different approaches*. Sixty-eight per cent of its regular viewers associated the channel with this, more so than any other PSB or non-PSB channel (see Figure A2.13).

Figure A2.13: PSB and other channels: innovation

It shows programmes with new ideas and different approaches

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 796

ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Sky One = 327, Sky News = 343, Discovery Channel = 196, MTV = 106, Living = 136.

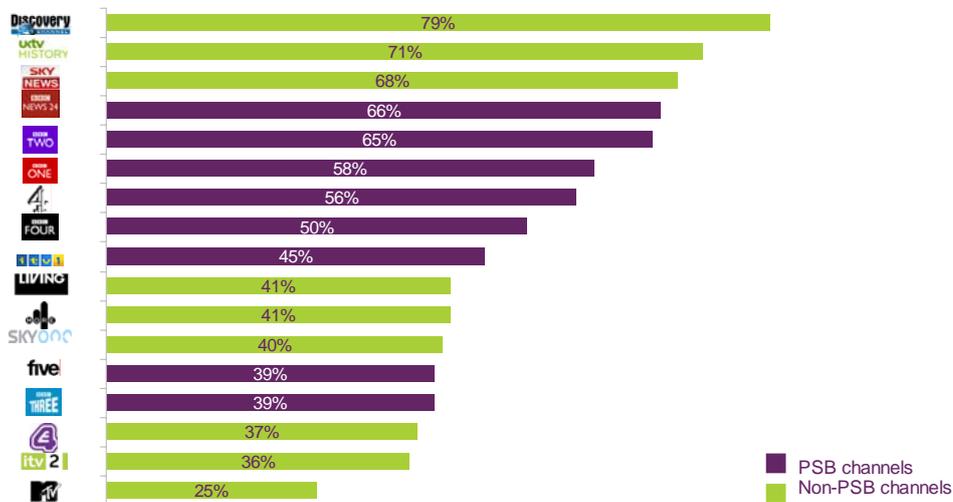
Characteristics: challenging

The Factual-based channels were associated with *challenging* content by sizeable proportions of their regular viewers; Discovery, UKTV History, Sky News, BBC News 24 and BBC Two were rated well in this area (see Figure A2.14).

Figure A2.14: PSB and other channels: *challenging programmes*

It shows programmes that make me stop and think

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



Base for 'all PSB channels': All respondents, 7157
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)
 BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 796, ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Sky One = 327, Sky News = 343, Discovery Channel = 196, MTV = 106, Living = 136.

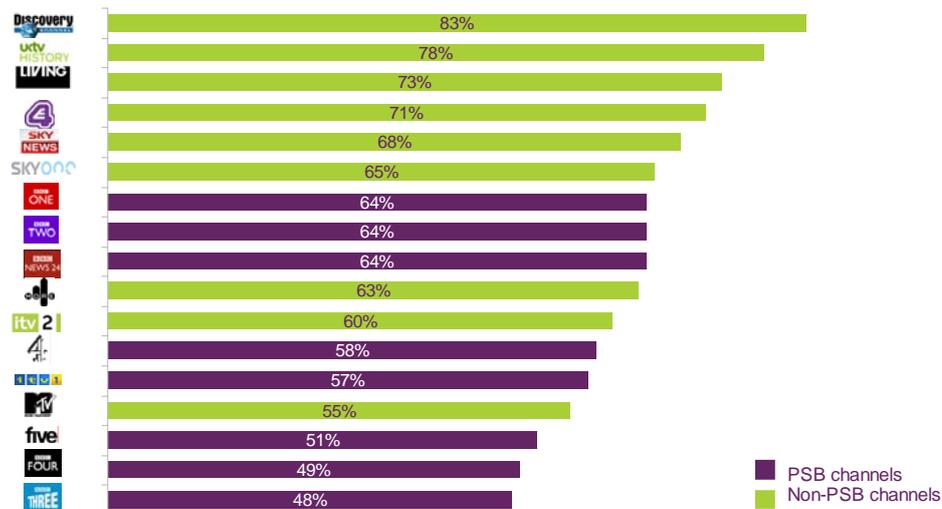
Characteristics: *engaging*

Figure A2.15 shows that the non-PSB channels tend to be rated well for showing *programmes I want to watch*; this is true for Living, E4, and Sky One as well as Discovery, UKTV Living and Sky News. As outlined earlier in this annex, these findings are likely to reflect the fact that the programme schedules of these non-PSB specialist channels are more targeted in nature, and so regular viewers are more likely to have strong positive views on the content.

Figure A2.15: PSB and non-PSB channels: *it shows programmes I want to watch*

It shows programmes I want to watch

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



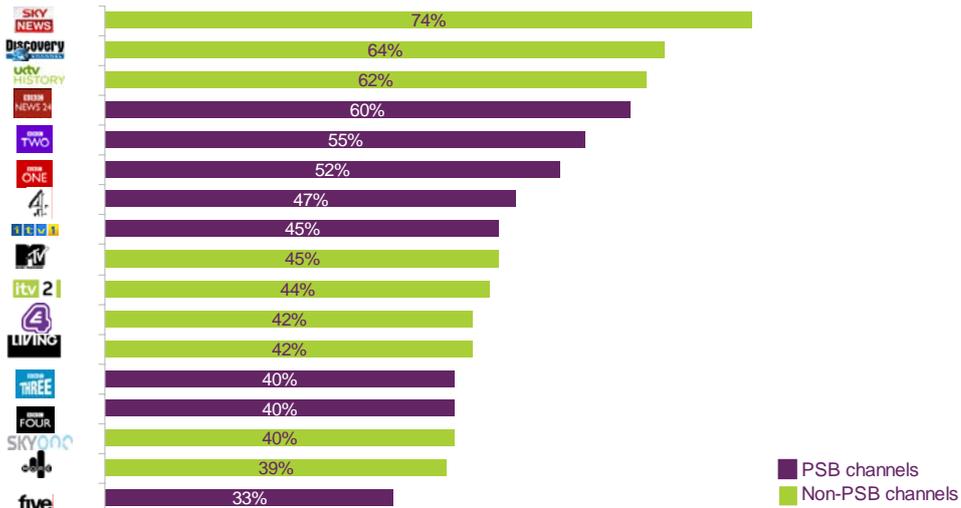
Base for 'all PSB channels': All respondents, 7192
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)
 BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 796, ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Sky One = 327, Sky News = 343, Discovery Channel = 196, MTV = 106, Living = 136.

When viewers were asked to rate channels according to whether their programmes *reflect the interests and concerns of people like me*, a more mixed picture emerged. Regular viewers of Discovery, Sky News, UKTV History were most likely to rate their channel positively, followed by regular viewers of BBC News 24 and other PSB channels (Figure A2.16).

Figure A2.16: PSB and other channels: programmes reflect the interests and concerns of people like me

Its programmes reflect the interests and concerns of people like me

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



Base for 'all PSB channels': All respondents, 7157

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 07, April 07, July 07, Oct 07)

BBC1 = 4938, BBC2 = 2378, ITV1 = 3724, Channel 4 = 2524, five = 1405, BBC3 = 476, BBC4 = 287, BBC News 24 = 796, ITV2 = 277, E4 = 418, More4 = 134, UKTV History = 311, Sky One = 327, Sky News = 343, Discovery Channel = 196, MTV = 106, Living = 136.

Annex 3

Overview of online contribution to PSB

Introduction

The first review of PSB undertaken by Ofcom in 2004 argued that we were entering a transitional period, in which the old way of funding public service broadcasting would need to give way to a new model. During this transition, the distinctions between 'TV' and 'non-TV' services are blurring and new forms of content and methods of delivery have the potential to help deliver the purposes of public service broadcasting in new ways.

For these reasons, the scope of the second review of PSB is extended to include some analysis of people's views on the perceived importance of PSB online and the delivery of this through the websites of the main TV channels. This is outlined in this annex.

Summary findings

Importance of PSB purposes and characteristics online

- Most internet users in an online panel felt strongly that it was important for the PSB channels to deliver the PSB purposes and characteristics online.
- Generally, the purposes were seen to be as important for the online sites of the main public service broadcasters as they are on the TV broadcast channels. The exceptions are that *making the person more interested in subjects* and watching/browsing content was *more* likely to be rated as important for the PSB internet sites, while *providing a wide range of good-quality news about my area* and *providing interesting content about history, science or the arts* are less likely to be seen as important for the PSB websites.
- Being *engaging* and having *good quality* content were the most important PSB characteristics for TV broadcast channels, with *trust* rated as the third most important element. For the online sites of the broadcasters, *trust* gained joint top ranking (alongside *quality*) as the characteristics most likely to be mentioned as being important.

Satisfaction with public service broadcasters' websites

- The purposes that the PSB websites were seen to deliver best were purpose 1: *Informing our understanding of the world* and *coverage of big national events* (purpose 3).
- 'Satisfaction gaps' between the perceived importance of the PSB purposes and characteristics online, and delivery against these by the websites, tend to be smaller than the gaps seen for the PSB TV channels (see section 3).

Background

The BBC has a clear remit to deliver its public purposes online as well as via television and radio. The BBC's public purposes do not align exactly with the PSB purposes and characteristics; but there are strong themes that run through both.

However, the PSB broadcasters other than the BBC do not have a direct remit to fulfil purposes and characteristics through their online activities, only via their broadcast channels.

Ofcom commissioned GfK to develop an online survey to ask regular internet users a set of questions relating to PSB purposes and characteristics. The questions were broadly similar to those asked in the PSB Tracker survey, used to monitor audience opinions of the performance of TV channels.

The main objectives of the online survey were:

- to understand how important internet users think it is for public service broadcast attributes and characteristics to be met online; and
- to understand how satisfied internet users are with public service broadcast attributes and characteristics online.

The online survey captured the opinions of 3003 respondents. Respondents were chosen from the GfK NOP online panel, which recruited from a wide range of sources (affiliate companies, respondents from previous research and website recruiting) and refreshed on a regular basis. This methodology was chosen in order to have good access to a large number of internet users. It is also useful to understand confident web users' relationships with PSB websites, because their comments are likely to relate to the websites themselves rather than to the internet generally.

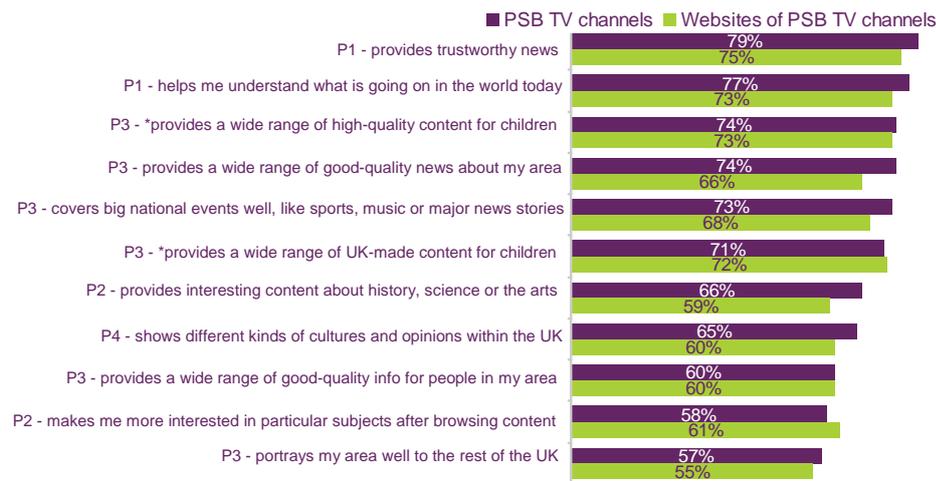
Importance and delivery of PSB by the main TV channels' websites

Figures A3.1 shows how the internet users interviewed assigned importance to the PSB purposes on the PSB TV channels and on the equivalent websites.

When considering the delivery of the PSB purposes and characteristics online, most internet users interviewed felt strongly that these are important for the PSB channels to do. The overall picture is one where the purposes were viewed as similarly important online as on the broadcast channels for the PSB channels. The notable exceptions were:

- *making the person more interested in subjects and watching/browsing content* was more likely to be rated as important for the PSB websites (61% vs. 58% for the PSB TV channels);
- *providing a wide range of good-quality news about my area* was mentioned at a lower level for the PSB websites (66% vs. 74% for the TV broadcast channels)
- *providing interesting content about history, science or the arts* was also mentioned by fewer people as being important for the PSB websites (59% vs. 66%)

Figure A3.1: PSB TV channels and PSB channels online: importance of purposes



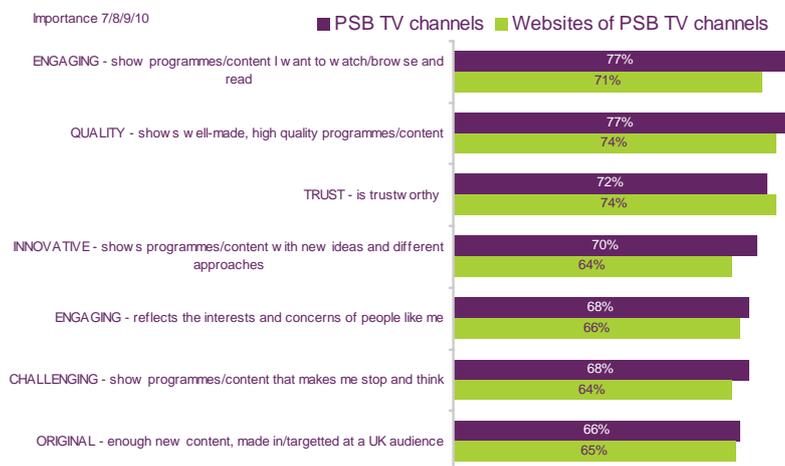
PSB Online study: Importance of purposes and characteristics

Base: PSB TV channels = 2905 (most statements), those responsible for children <16 = 835 (*2 children-related statements)

Base: PSB websites = 3003 (most statements), those responsible for children <16 = 856 (*2 children-related statements)

Figure A3.2 shows the importance allocated to the PSB characteristics on the PSB TV channels as well as online⁷². This shows that the internet panel felt strongly that it was important that the PSB characteristics are evident in the websites of the PSB channels. Being *engaging* and having *high quality content* were the most important characteristics for TV broadcast channels, with *trust* rated as the third most important element. For the broadcasters' websites, *trust* gets joint top ranking (alongside *quality*) as the characteristic most likely to be mentioned as important.

Figure A3.2: PSB TV channels and PSB channels online: importance of characteristics



PSB Online study: Importance of purposes and characteristics

Base: PSB TV channels = 2905 (most statements), those responsible for children <16 = 835 (*2 children-related statements)

Base: PSB websites = 3003 (most statements), those responsible for children <16 = 856 (*2 children-related statements)

Respondents were also asked to rate how well they thought the PSB broadcasters' websites met the PSB purposes and characteristics. The opinions of people who had used at least one of the PSB websites are shown in Figure A3.3. These opinions are shown alongside the

⁷² This data shows a similar overall picture of the importance of the PSB purposes and characteristics on the PSB broadcast channels as reported in section 3, however the percentages differ due to the different sample of people in the research (internet users compared to the general population).

importance placed on the purposes and characteristics by the overall sample of all web users⁷³ (as shown in the Figures above).

The purposes that the PSB websites were seen to be delivering best were; purpose 1: *informing our understanding of the world* (by being associated with *trustworthy* news (65%), and *helping to provide an understanding of the world*, (67%) and purpose 3: *coverage of big national events* (64%). The websites were least closely associated with *giving a positive portrayal of people's nations or regions* (37%) and *providing a wide range of good quality information for people in my area* (44%).

The biggest 'satisfaction gaps' between the perceived importance of the PSB purposes online and satisfaction with the PSB websites on these elements were for statements relating to Children's content and area-focused content (i.e. nations and regions); in particular⁷⁴:

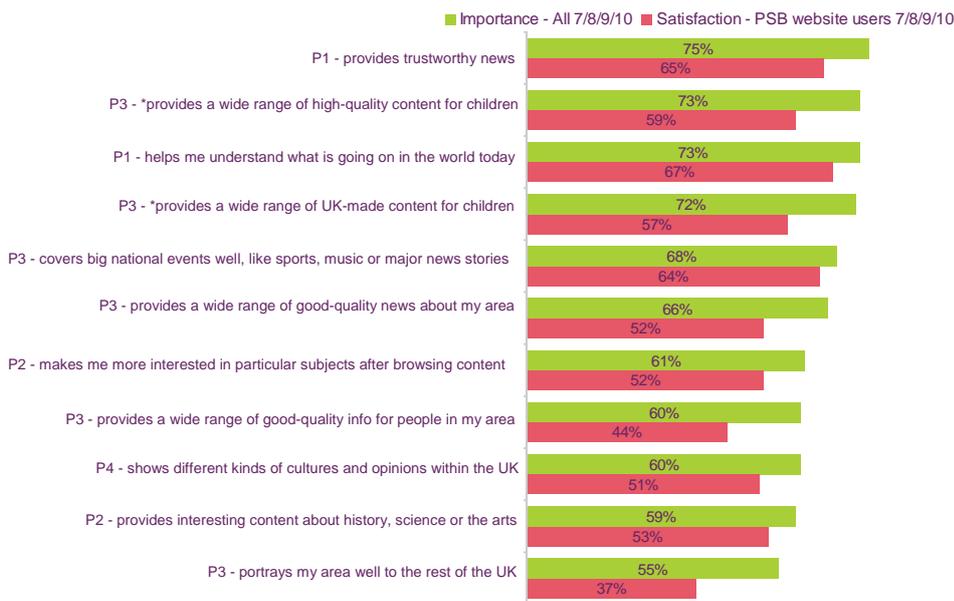
- the range of high quality Children's content (-14%);
- the range of UK-made Children's content (-15%);
- the portrayal of areas to the rest of the UK (-18%);
- the provision of a wide range of good quality info for people in my area (-16%); and
- the provision of good quality news for my area (-14%).

However the 'satisfaction gaps' between the perceived importance of the PSB purposes and characteristics online and delivery against these by the websites tended to be smaller than the gaps for the PSB TV channels (see section 3).

⁷³ These responses are shown together because perceived importance provides a useful context for the perceived delivery; however it should be noted that the data is therefore based on differing samples.

⁷⁴ NB the gaps referred to are between the general sample of web users opinions on importance, and the satisfaction amongst those who have used at least one of the PSB websites.

Figure A3.3: Satisfaction with PSB channels' websites: purposes

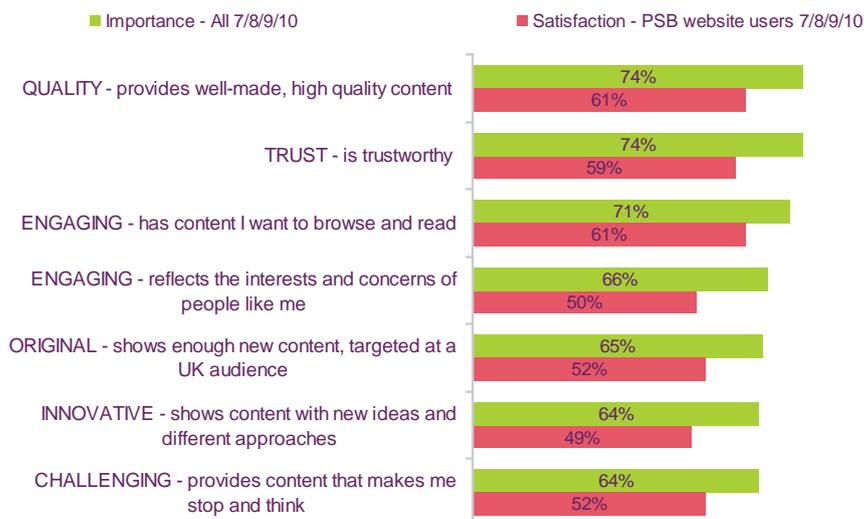


PSB Online study: Important overall that for the website provided by the main TV channels/satisfaction with the websites
 Base: Importance = 3003 (most statements), those responsible for children <16 = 856 (*2 children-related statements)
 Base: Importance & Satisfaction among those who have used at least one of the PSB websites = 2210

Figure A3.4 shows the perceived delivery of the PSB characteristics by the PSB websites among people who have used at least one of these. It shows that satisfaction with the websites on these elements was more uniform than the delivery of the purposes; all characteristics were rated positively by between 50% and 61% of the website users. The PSB websites were associated with the largest proportions of users in relation to providing *well-made high quality content* (61%), *having content that the users want to browse and read* (61%) and *being trustworthy* (59%)

As seen with the purposes, the 'satisfaction gaps' between the perceived importance of the PSB characteristics online, and delivery against these by the websites, tended to be smaller than the gaps for the PSB TV channels (see section 3).

Figure A3.4: Satisfaction with PSB channels' websites: characteristics



PSB Online study: Important overall that for the website provided by the main TV channels/satisfaction with the websites
 Base: Importance = 3003 (most statements), those responsible for children <16 = 856 (*2 children-related statements)
 Base: Importance & Satisfaction among those who have used at least one of the PSB websites = 2210

Annex 4

Perceptions of, and attitudes towards, television

Contents

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Section 1

Executive summary

Viewing habits and preferences

BBC One remains the nation's favourite television channel.

- Forty-seven per cent of viewers in analogue terrestrial-only homes would choose BBC One if they could only have access to one channel, and 29% among viewers in multichannel homes.
- BBC One is the most valued channel among all viewers in analogue terrestrial-only homes, at 40%, and among viewers in multichannel homes, at 28%.
- ITV1's preference rating has dipped from 31% to 23% of adults over the last five years.
- Younger viewers are disproportionately likely to choose Channel 4 and Sky Sports (13% and 10% respectively).

Sources of, and attitudes towards, news

Television remains most people's main source of world and local news.

- Television was mentioned by 70% of respondents as being their main source of world news while television was given by 47% as their main source for local news.
- Levels of trust in television news remain high - 68% perceived television news as providing the most fair and unbiased source of world news coverage.
- Impartiality of television news is considered universally important.

Programme standards

Many remain critical of programme standards, although attitudes appear to be softening

- Forty-one per cent of the sample say that programme standards on television have got worse.
- However, this figure has fallen significantly since 2002 (47%).
- Older people are the least happy with standards.
- Repeats (51%) and lack of variety (35%) are the main reasons cited for why programme standards are felt to have got worse
- BBC One is seen as the most improved channel, in terms of quality.

The majority of respondents have never been personally offended by anything seen or heard on TV

- Thirty-two per cent said that they had been personally offended by something they had seen or heard on television, although most believed that these things should still be allowed to be shown (after suitable warnings).
- Swearing and offensive language were the primary causes for complaint (45%)
- Channel 4 was seen as the main offender (mentioned by 42%). BBC Two (15%) had caused least offence.

Most viewers believe that there is too much violence, swearing and intrusion into other people's lives on television

- Fifty-seven per cent said they thought there was too much violence and 55% thought there was too much swearing.
- In contrast, 49% felt there was about the right amount of sex shown on television.
- Fifty-nine per cent said that there was too much intrusion into other people's lives.
- Older people and women were more likely to say that there was too much sex, violence and swearing.

Protection of children

The majority of respondents believe that parents and broadcasters are equally responsible for ensuring that children do not see unsuitable programming

- Knowledge of the watershed continues to be high (at 92%) although fewer people were aware of the actual time it came into force on terrestrial television (81%).
- Forty per cent of multichannel parents claimed they were not aware that on pay-per-view channels one could buy 18-rated films at any time. Just over a quarter (27%) felt that this function was a bad idea.
- Almost a third of parents (32%) said that they had actively prevented their children from watching something on television in the last month (usually by switching over the channel).
- Forty-three per cent of parents in multichannel homes claimed to use parental blocking systems.

Television advertising

Tolerance of advertising appears to be decreasing

- Among analogue terrestrial-only respondents, equal proportions feel that *current levels of advertising on commercial terrestrial channels is acceptable* and that *there is already too much*, at 38% and 39% respectively. However, the proportion saying that *the current amount is acceptable* has declined from 50% in 2003, and the proportion saying that *there is already too much* has increased from 31% in 2003.

- Among cable and satellite respondents, equal proportions feel that *the current amount of advertising on commercial terrestrial channels is acceptable* and that *there is already too much*, at 39% and 40% respectively. However, when asked specifically about non-terrestrial channels, the majority (46%) felt that there was already too much advertising.
- Of the analogue terrestrial-only respondents, 10% would accept more advertising on commercial terrestrial television, down from 17% in 2003.

Advertisements are more likely to mislead than offend

- Thirty-six per cent had ever found an advertisement to be misleading.
- Incidences of offensive advertising are rare by comparison (only 20% of the sample had ever found an advertisement offensive).

Section 2

Introduction

Ofcom tracks a number of broadcasting-related questions in the Ofcom Residential Tracker. Some of the questions monitored have remained the same since the Independent Television Commission (ITC) first began the survey, then known as *The Public's View*. This project continues to provide an invaluable picture of trends, mapping some of the main changes in attitudes towards broadcasting.

The report consists of five main sections. It starts by looking at **viewing habits and preferences** in terms of television channels. It then explores **sources of, and attitudes towards, News**; both local and national. **Programme standards** are then discussed; we probe viewers' perceptions of changes in standards over time, and their attitudes to offensive material on television. Attitudes towards the watershed are also covered, with particular emphasis on the **protection of children**. The report concludes by considering **attitudes towards television advertising**.

Before 2005, fieldwork for this survey was conducted in two halves, with the first wave usually conducted in April and the second wave in September. From 2005, Ofcom created the Residential Tracker and the relevant broadcasting questions continued to be tracked, but although they continued to be asked at least twice a year, different sections were asked at different times, so that other questions could also be incorporated into the Tracker.

The 2007 survey was conducted by MORI. It employed face-to-face interviews, conducted in respondents' homes, and among adults aged 16+ who had a working television set in their home. The data were then weighted to be representative of the UK population. For the 2007 survey the questions on viewing habits and preferences were asked in March and September, among a total sample of 1,489 adults, and questions on News were asked in March among a total sample of 769 adults. The questions on programme standards were asked in April and October among a sample of 1,424 adults, the questions on protection of children were asked in January and August among a total sample of 1,473 adults and the questions on attitudes to advertising were asked in May and October among a sample of 1,433 adults.

Section 3

Viewing habits and preferences

Television channels

Firstly, to try to establish some idea of channel loyalty, 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?'* This question was asked separately to analogue terrestrial-only and multichannel respondents. Table A4.1 summarises the responses to this question.

Among analogue terrestrial-only respondents the most popular choice, mentioned by 43% of respondents in 2007, was BBC One. Except for in 2005, BBC One has always been the first-choice channel among analogue terrestrial-only viewers. The 2005 results saw BBC One and ITV1 draw almost equal (30% and 32% respectively) with ITV1 gaining six percentage points on the 2004 figure and BBC One losing 13 percentage points from 2004. BBC Two appeared to double its figures, from 7% mentioning it as the channel they would choose if they could only have one in 2004, to 14% in 2005.

In 2007, among multichannel viewers, BBC One (29%) and ITV1 (20%) were the two most popular channels, followed by Sky Sports 1/2/3/Extra (6%). Both BBC Two and Channel 4 were mentioned by 5%, followed by Sky One (4%) with Five and E4 mentioned by 3%. No other non-PSB channel was mentioned by more than 3% of multichannel respondents. Overall, it is still the case that the number of multichannel respondents choosing the PSB channels is over 60%, with just over a third mentioning a non-terrestrial channel. Interestingly, for all the multichannel respondents, the number of non-terrestrial channels being chosen by more than 5% of respondents is in decline. It seems that the viewing pattern of multichannel respondents is becoming more fragmented (with regard to the multichannel channels), which is to be expected as the non-terrestrial channels increase in number.

Table A4.1

	All analogue terrestrial only respondent					All Multichannel respondents				
	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007
Base	550	381	459	346	258	601	596	980	1054	1231
	%	%	%	%	%	%	%	%	%	%
BBC One	41	43	30	45	43	32	28	30	33	29
BBC Two	9	7	14	9	10	4	3	5	4	5
ITV1	31	26	32	21	23	21	20	23	16	20
Channel 4 (S4C in Wales)	11	11	12	12	10	4	5	5	6	5
Five	5	6	4	5	4	2	3	3	4	3
Total terrestrial channels	97	93	92	92	90	63	59	66	63	62
Total multichannel	n/a	n/a	n/a	n/a	n/a	35	36	31	34	34

* 'Don't knows' and 'none of these' not shown * (Q: 'Thinking of television channels, if you could have only one of the television channels you currently receive at home, which one would you choose?')

Unsurprisingly, different channels attract different audiences, and this is shown in Table A4.2. BBC One's lead against ITV1 was greatest within the 45-64 age group, where it led by 21 percentage points. Within the 25-44 age group, BBC One and ITV1 were almost equal. BBC Two was more popular with the oldest age group (9%, compared with 5% among all multichannel respondents). ITV1's popularity was highest amongst the oldest group (65+). The youngest age group (15-24) was less likely to mention BBC One and ITV1, than any of the other age groups. They were more likely to name Channel 4 (13%), Sky Sports (10%), E4 (9%) and Sky One (7%).

Table A4.2

	Channel would choose if could have only one, by age			
	Age			
	15-24	25-44	45-64	65+
Base: All multichannel	180	490	387	168
	%	%	%	%
BBC One	11	23	41	37
BBC Two	3	4	5	9
ITV1	7	22	20	27
Channel 4 (S4C in Wales)	13	5	2	5
Five	2	3	3	3
Total multichannel	60	38	25	14

* 'Other', 'None of these' and 'Don't know' not shown * (Q: 'Thinking of television channels, if you could have only one of the television channels you currently receive at home, which one would you choose?')

Having established which channel respondents would choose if they could only have one, the survey went on to ask 'Which one channel would you say you value the most?' The responses were almost identical, both among analogue terrestrial-only and multichannel respondents, to the figures given for the previous question: 'which channel would you choose if you could only have one?' (Table A4.3)

Table A4.3

Channel valued the most compared with first choice channel		
	Valued the most	First choice channel
Base: All analogue terrestrial-only respondents	258	258
	%	%
BBC One	40	43
ITV1	10	10
BBC Two	22	23
Channel 4	11	10
Five	3	4
Channel valued the most compared with first choice channel		
	Valued the most	First choice channel
Base: All multichannel respondents	1231	1231
	%	%
BBC One	28	29
ITV1	6	5
BBC Two	18	20
Channel 4	5	5
Five	3	3

*'Don't know' not shown *(Q: 'Which one channel would you say you value the most?')

Attitudes to television

The survey went on to ask respondents whether they agreed or disagreed with four statements. Table A4.4 details the responses.

The first and second statements about allowing people to pay extra to watch either sexually explicit or violent television both attracted widespread agreement, which was higher among the youngest age groups. Statements three (about not showing things that might offend people) and four (about cutting out sex, violence or swearing out of films shown before 10pm) attracted more disagreement. For the third statement, agreement was higher among the youngest age group (28% among 15-24s) and the oldest age group (30% among over-65s). For statement four, disagreement was higher, particularly among the younger respondents (under 45s, 62%) and among males (60%).

Table A4.4

	Attitudes to four statements about television				
	Strongly agree	Agree	Disagree	Strongly disagree	Don't know/no opinion
Base: All respondents	%	%	%	%	%
(1) If people want to pay extra to watch particularly sexually-explicit programmes not available on other television channels, they should be allowed to do so	16	55	8	4	17
(2) If people want to pay extra to watch particularly violent programmes not available on other television channels, they should be allowed to do so	12	47	15	8	18
(3) Things that are likely to upset or offend even a minority of people should not be shown on television	6	19	38	14	24
(4) I think films shown after 10pm should have the sex, violence or swearing cut out	7	13	42	14	23

Section 4

Sources of, and attitudes towards, news

Respondents were asked questions about the medium they used to find out about local news and world news.

Local news

Respondents were first asked 'Can you tell me what is your main source of news about what is going on in your own local area?' Television was mentioned by 47% of respondents. This was followed by 'any newspaper', at 27%. Prior to 1997, newspapers had always been mentioned as the main source of local news, then in 1998 television overtook them and this remained the case until 2001, when newspapers went back into the lead. In 2002 the trend reversed again and television was mentioned as the main source. Table A4.5 tracks the four main sources of local news since 1999.

Mentions of radio as the main source of local news has remained stable year-on-year (10% in 2007 compared with 11% in 2006), as has 'talking to people' mentioned by 6% of respondents in 2007. The same proportion as last year (1%) named Teletext as their main source of local news. The internet was mentioned by 4% of respondents in 2007, compared to 2% in 2006. Respondents aged under 45 were more likely to mention the internet, at 7% compared with 1% of respondents over 45. Similar data were reported across the different age groups, with some variation across age. A higher proportion of respondents aged 65+ were more likely to name newspapers as their main source of local news, compared with the average (32% and 27% respectively).

Table A4.5

	Main source of news about what is going on in local area								
Base: All respondents	1999	2000	2001	2002	2003	2004	2005	2006	2007
	%	%	%	%	%	%	%	%	%
Television	40	34	28	48	44	46	46	46	47
Any newspaper	34	31	46	32	37	36	29	29	27
Radio	13	16	14	13	12	12	10	11	10
Talking	7	14	7	3	2	5	4	5	6

* 'Don't know' and 'other' not shown *(Q: 'Can you tell me what is your main source of news about what is going on in your own local area?')

World news

Respondents were then asked what was their main source of world news. Table A4.6 below shows the trend in responses since 1999. Even though the trend fluctuates slightly, television is still being mentioned as the main source of world news by the majority of respondents. The internet was mentioned by 8% of respondents in 2007.

Table A4.6

Main source of world news									
Base: All respondents	1999	2000	2001	2002	2003	2004	2005	2006	2007
	%	%	%	%	%	%	%	%	%
Television	67	72	66	79	78	77	72	72	70
Any newspaper	17	13	16	9	10	11	10	10	8
Radio	11	9	14	8	7	7	9	8	9

* 'Don't know' and 'other' not shown *(Q 'Can you tell me what is your main source of news about what is going on in the world today?')

There were slight variations by socio-economic group and by age. Those in the ABC1 socio-economic group (63%) were less likely to name television as their main source of world news than either the C2DE group (78%) or the total sample (70%). ABs were more likely to name radio, at 16% compared to 9% of the total sample, and this was also the case among older respondents; 13% of 45-64s mentioned radio compared to 7% of under-45s.

Respondents aged 65+ were more likely to name newspapers as their main source of world news, at 18% compared to the average of 8%. While the internet was mentioned by 8% of all respondents, this figure increased to 14% among under-45s.

The survey then asked respondents *which one television channel was their preferred source for getting world news*. The majority response was news shown on BBC One, mentioned by 38% of respondents. This was followed by BBC News 24, which was mentioned by 21% of respondents. News on ITV1 was mentioned by 16% of respondents and Sky News by 10%.

Respondents were asked which medium they considered to give the most fair and unbiased source of world news coverage, television was mentioned by 68% of respondents (remained fairly stable over the years 67% in 2006 and 66% in 2005), followed by radio (9%). People aged 25-44 were more likely to choose radio (14%) and 15-24 less likely (4%). The internet was mentioned by 5% of respondents, younger respondents were more likely to say internet, 8%, with newspapers mentioned by 4% of respondents.

Impartiality of news

Respondents were then read out the following paragraph *'When talking about the news, impartiality means that each side is reported with equal weight, and that the organisation doing the reporting is not allowed to express their views on the merit of each side of the case. In the UK, television and radio channels are required by law to be impartial. Newspapers and the internet, while still having to be accurate, do not need to be impartial. How important do you personally think it is that news in general is impartial?'* Almost two-thirds of respondents (64%) felt that it was 'very important' (this figure remained stable, with 62% in 2006 and 66% in 2005); while a further 26% felt it was important. A slightly smaller proportion of respondents aged 15-24, 54%, felt that it was 'very important'. Overall, only 1% of respondents felt that it was unimportant. Respondents were then asked: *How important they personally felt it was that news from a variety of different sources was impartial.* Respondents felt that it was most important for television news to be impartial (92%);- this figure was slightly lower among respondents aged 15-24, at 84%), followed by radio (87%), then newspapers (84%), Teletext (77%), the internet (74%) and finally magazines (68%).

Section 5

Programme standards

Overall standard of television programmes

Respondents were asked how they felt about the quality and standards of programmes.

First, they were asked a general question ‘Do you feel that over the past year, television programmes have improved, got worse or stayed the same?’ Table A4.7 shows the trend of responses to this question since 1999. The proportion saying that programmes had got worse increased to 41%, from 35% in 2006, but the majority response was ‘stayed the same’, mentioned by 46% of respondents.

Table A4.7

Opinions about television programmes in general: 1999-2007									
Base: All respondents	1999	2000	2001	2002	2003	2004	2005	2006	2007
	%	%	%	%	%	%	%	%	%
Improved	8	13	12	12	15	10	10	13	10
Got worse	31	28	46	47	40	42	40	35	41
Stayed the same	59	59	41	40	44	46	47	49	46

*Don't knows not shown *(Q: ‘Do you feel that over the past year, television programmes have improved, got worse or stayed the same?’)

As in previous years, the age of the respondent had a significant bearing on the response. Older people tended to be less likely to say that programmes had *improved* or *stayed the same*, and were more likely to say that they had *got worse* (50% of over-45s compared with 32% of 15-44s). Respondents in analogue terrestrial-only homes were more likely to say that programmes had *stayed the same*, compared to those in multichannel homes. Looking specifically at opinions by platform, 42% of respondents in pay multichannel homes felt that programmes had *got worse*, an increase from 31% in 2006. This is also true of the respondents in Freeview-only homes, where 46% claimed that programmes had *got worse*, up from 38% in 2006.

Table A4.8

Opinions about all television programmes, by age and platform												
	Total		Age				Platform					
	2006	2007	15-44		45+		Analogue terrestrial only		Pay multi-channel		Freeview only	
			2006	2007	2006	2007	2006	2007	2006	2007	2006	2007
	%	%	%	%	%	%	%	%	%	%	%	%
Base	1482	1424	645	651	833	769	362	279	711	676	407	451
Got worse	35	41	28	32	43	50	39	35	31	42	38	46
Improved	13	10	18	15	8	5	7	8	17	11	12	7
Stayed the same	49	46	52	50	47	42	51	52	49	45	48	45

*Don't knows not shown *(Q: 'Do you feel that over the past year, television programmes have improved, got worse or stayed the same?')

Respondents who said that programmes standards had improved were asked to specify in what ways they felt this had happened (overall numbers of these respondents are quite small, at 10% of the total sample; therefore caution should be taken when using the figures and they should be treated as indicative only) The main response was 'a wider range of programmes', mentioned by 49% of respondents.

The survey then asked those respondents who had said that programme standards had 'got worse' in what ways they felt standards had fallen. As has been found in previous surveys, the most-mentioned response was 'more repeats', at 51%, followed by people saying: 'lack of variety', at 35%. Almost a fifth of respondents (18%) said: 'too much reality TV. The total proportion of respondents mentioning 'more sex', 'swearing' or 'violence', as a reason for declining standards remained relatively stable from 2006 at 12%, 15% and 16% respectively in 2007. Older respondents (45+) were more likely to mention 'more sex', 'swearing' or 'violence', at 14%, 18% and 19% respectively compared to respondents under 45 at 9%, 10% and 12% respectively.

Quality of programmes and channels

Respondents were then asked whether the quality of programmes had improved, got worse or stayed the same. Over half of all respondents claimed that, in terms of quality, programmes had 'stayed the same' (51% cf. 53% in 2006). There was an increase in the proportion saying that programmes had 'got worse' at 31% of respondents compared with 26% in 2006. In 2006, 14% of all respondents said that programmes had improved, 18% in 2007. There was variation between ages, and as in the previous question, those aged under 45 were more positive with almost a fifth (19%) saying that programmes had 'improved' in terms of quality, compared to only 9% among over-45s. These older respondents were much more likely to say that programmes had 'got worse' in terms of quality, at 41% compared to 23% of respondents aged under 45, although, overall, the majority, 47%, felt that programme quality had 'stayed the same'.

Those who claimed that there had been an improvement or worsening of programmes in terms of quality were then asked on which channels these changes had occurred (Table A4.9).

BBC One was the channel mentioned by most respondents both for having 'improved' in terms of quality, and for having 'got worse'.

Table A4.9

Channel which had improved and which had got worse in terms of quality		
Channel	Improved	Got worse
Base	188	464
	%	%
BBC One	43	58
ITV1	39	52
BBC Two	24	30
C4	19	30
Five	14	13

*Don't knows not shown *(Q: 'And on which channels has the quality of programmes got worse/improved over the last year?')

Offensive television content

The survey asked respondents 'Do you personally see or hear things on television which you find offensive?' Table A4.10 shows the trend data for this question. The 2007 figure remained relatively stable compared to previous years, with 32% of respondents reporting offence.

Table A4.10

	Overall levels of reported offence: selected years										
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Base: All respondents	%	%	%	%	%	%	%	%	%	%	%
Respondents offended	37	31	32	29	42	42	41	32	32	30	32

*(Q: 'Do you personally see or hear things on television which you find offensive?')

There were variations in the proportions of people reporting offence, depending on their age group (Table A4.11). The youngest age group was the least likely to report having been offended, at only 17% compared with almost half of the respondents in the oldest age group, 65+. Other demographic differences were that men were less likely than women to have been offended (28% and 35% respectively).

Table A4.11

	Overall levels of reported offence by age				
	Total	Age			
		15-24	25-44	45-64	65+
Base: All respondents	1424	187	464	448	321
	%	%	%	%	%
Yes	32	17	28	34	48
No	66	82	70	64	50
Don't know	2	2	2	2	2

*(Q: 'Do you personally see or hear things on television which you find offensive?')

The survey went on to try to ascertain on which channel(s) the offending material had been seen. The following table lists the results for the five most mentioned channels, together

with comparable results for the last three years. BBC Two was the terrestrial analogue channel least likely to be mentioned, with Channel 4 being mentioned the most frequently (by around four in ten of respondents, who had seen something offensive).

Table A4.12

Channels said to carry offensive material: 2004-2007				
	2004	2005	2006	2007
Base: All who saw or heard something offensive	697	502	486	458
	%	%	%	%
BBC One	28	25	28	29
BBC Two	17	17	15	15
ITV1	37	35	30	31
Channel 4	47	37	35	42
Five	26	19	18	19

**(Q: 'And on which channel or channels have you seen or heard something offensive in the last year?')*

Respondents who had named a particular channel as having carried offensive material, were asked about the nature of the offensive content on that channel. While there were slight variations across the five main channels, overall the majority response was 'bad language', (45%) 'sex' (34%) 'violence' (24%) and 'bad taste/shock tactics' (23%).

Those respondents who had reported offence were then asked: 'What do you generally do when you are offended?' Over half (53%) said that they switched over channels and 42% claimed to switch off. Almost one in ten (9%) said that they continued watching or did nothing. The age of the respondent was a key factor in how they reacted to being offended. Among the 15-24 age group 19% claimed that they switched off, but among the over-65s this figure was over half (52%).

A further question was asked of those respondents who had reported offence, asking them to choose which of three statements best described their attitude towards offensive material on television. As can be seen in Table A4.13, overall, the highest proportion of respondents felt that the material they had found offensive should still be shown, but only after a clear warning had been broadcast. The younger age groups were more likely to say that, although they had been offended, others had the right to watch the material if they wanted to. Twenty-nine per cent of the group that had been offended and were aged over 65, said that the things that had offended them should not be shown.

Table A4.13

	Attitude towards offensive material					
	Total	15-44	45-64	65+	Male	Female
Base: All who saw or heard something offensive	458	153	148	155	203	255
	%	%	%	%	%	%
Should not be shown	22	19	18	29	28	17
Others should be allowed to see	34	39	37	25	33	35
I think such things should only be shown after a clear warning	39	39	41	37	35	43

* Don't knows not shown *(Q: 'And which of these statements best describes your attitudes towards things which have offended you on TV?')

All respondents were then asked, in regard to four particular causes of offence, whether they thought there was *too much*, *too little* or the *right amount* of each of these aspects on television (Table A4.14).

The overall majority of respondents felt that there was too much violence, swearing and intrusion into other people's lives on television. For sex, around half (49%), thought that there was the *right amount*, although a large proportion, 38%, felt that there was too much. Older people were more likely to say that there was *too much* of all four aspects, compared with younger people. Similarly, women were more likely than men to say there was too much sex, violence and swearing on television.

Table A4.14

	Opinions about the amounts of coverage of four aspects of television			
	Sex	Violence	Swearing	Intrusion into other people's lives
Base: All respondents	1424	1424	1424	1424
	%	%	%	%
Too much	38	57	55	59
Too little	4	2	2	1
About the right amount	49	36	37	28
Don't know	8	6	5	12

*(Q: 'Do you think in general that there is too much, too little or about the right amount of sex/violence/swearing/intrusion on television?')

The respondents who said that there was *too much* of the four aspects on television were then asked how they felt about it (whether they were offended, or not bothered). More than two-thirds of the respondents who claimed that there was *too much* violence on television said that they were offended by this (70%); and the same was true of swearing (72%). Sixty-eight per cent of the respondents who felt that there was *too much* sex on television said that they were offended by it. Intrusion into other people's lives was regarded as offensive by a slightly lower proportion (67%) of the respondents who thought there was *too much* of it on television.

Respondents were then asked whether they agreed or disagreed that *certain programmes showed material containing unfair treatment of people or organisations*. Forty-three per cent agreed with this statement, but overall, only 36% of respondents were offended by it. Over-

65s were more likely to be offended than the younger groups, at 45% compared with 24% of 15-24s, as were ABC1s, at 41% compared with 33% of C2DEs.

Section 6

Protection of children

Protection of children

The survey went on to consider attitudes towards the protection of children. The first question asked all respondents who they thought was responsible for ensuring that children did not see unsuitable programmes. Table A4.15 details the responses since 2004.

Figures for 2007 show that around half of the sample still believed that it is the responsibility of the broadcasters and parents equally, to protect children from seeing unsuitable programmes. There has been a marginal increase in the number saying this since 2004.

Table A4.15

	Responsibility for children's viewing			
	2004	2005	2006	2007
Base: All respondents	1034	2896	1451	1473
	%	%	%	%
Mainly parents	45	43	43	42
Mainly broadcasters	5	5	5	4
Both equally	49	51	51	53

*Don't knows not shown *(Q: 'Do you think it is mainly the responsibility of parents, broadcasters or both equally, to make sure that children don't see unsuitable programmes?')

The survey went on to explore respondents' knowledge of the existence of the watershed: 'Broadcasters are required to show television programmes which are not suitable for children only after a certain time in the evening. Before now, were you aware of this?' Knowledge of the watershed continued to be high, at 92%. There appeared to be no significant variation in homes with children compared to those without, as was found in previous years.

Respondents who were aware of the watershed were then asked whether they knew at what time it was in force from on terrestrial television. A similar proportion as last year correctly said that it was at 9pm (81% cf. 84%). This correct time was confirmed by the interviewer, and respondents were then asked whether they thought that 9pm was 'too early', 'too late' or 'about right'. The figures remained relatively unchanged from last year, with just over two-thirds saying that 9pm was 'about right' (Table A4.16).

Table A4.16

	Opinions about the 9pm watershed				
	2003	2004	2005	2006	2007
Base: All respondents	1186	1034	2176	1451	1473
	%	%	%	%	%
Too early	25	32	26	25	23
Too late	7	7	6	6	8
About right	66	57	64	67	65

*Don't knows not shown *(Q: 'On terrestrial TV channels the time after which these programmes may be shown is 9pm, usually known as the 9 o'clock watershed. Do you think this is too early, too late or about right?')

Respondents in multichannel homes were asked whether they were aware that on pay-per-view channels, where each film can be ordered individually, a viewer can watch 12-, 15- and 18-rated films at any time: 'Were you aware of these rules for pay-per-view channels before I

described them? Over half, 54%, of respondents claimed that they were aware, and 40% claimed that they were not. Younger respondents had higher levels of awareness, at 63% of 15-24s, compared to 28% of over-65s. Also respondents with children had higher levels of awareness, at 61% compared to 50% of those without children.

Multichannel viewers were asked for their opinions about programmes watched on a pay-per-view basis, and whether or not they thought that the relaxed rules (which enabled them to watch films classified as 12, 15 and 18 at any time by using a PIN number) was a good idea. Forty per cent felt that it was a good idea, the same proportion as in 2006. Just over a quarter (27%) thought that it was a bad idea.

Parents in the sample were asked whether in the last month they had actively prevented their child/children from having access to certain television programmes because they felt that they were unsuitable. Just under a third (32%) claimed that they had, compared with 38% in 2006. The age of the child made a difference; parents with children aged 4-9 were more likely (40%) to have actively prevented them from having access to certain programmes.

Respondents who said that they had actively prevented their children from viewing unsuitable material were asked how they had done this. As can be seen from Table A4.17, the most popular claimed response of parents was that they *had switched channel*, followed closely by *turned off* the television entirely.

Table A4.17

	Actions taken to prevent access to certain programmes	
	Totals	
	2006	2007
Base: All parents of children under 16 who had actively prevented access to a programme	152	123
	%	%
Turned off	36	36
Switched channel	42	43
Telling them	14	14
Sent to bed	25	25
Parent lock (equipment/software to prevent children accessing certain TV programmes)	13	11
Take them out of room	7	9

* Don't knows not shown *(Q: 'And how have you prevented your child(ren) having access to certain programmes on TV?')

Respondents in multichannel homes were then asked whether their multichannel system had a feature which enabled them to block access to certain channels. Around half (51%) claimed that their system had such a feature, 28% said that it did not, and over a fifth said they didn't know. Younger respondents (aged 15-24) and those with children in the household were more likely to answer 'yes'; 61% and 59% respectively. These figures are lower than in 2002, when 64% of respondents claimed that their system had such a feature, 20% claimed they hadn't and 16% said that they didn't know.

The majority of respondents, who had claimed that their multichannel system had a blocking feature, said that the system worked by using a PIN number (76%). Nearly a fifth of respondents, 18%, claimed that they did not know how it worked. Only 3 in 10 respondents claimed to have ever used the blocking facility, and this figure increased among those with children in the home (43%).

Section 7

Television advertising

Awareness of promotional messages

The survey went on to ask respondents whether they were aware of three different forms of promotional messages, other than advertisements:

- i) programme sponsorship e.g. Cadbury's sponsorship of *Coronation Street*;
- ii) trailers or promotions for particular programmes; and
- iii) trailers or promotions for particular television channels.

Table A4.18 details the responses, with comparable figures for 2006. As in 2006, more people were aware of 'programme trailers', although awareness of all three types of promotional messages have increased since last year. Respondents in multichannel homes had greater awareness of all three types of message, compared to those in analogue terrestrial-only homes.

Table A4.18

	Awareness of three types of promotional message					
	Totals		Age		Channel reception	
	2006	2007	16-44	45+	Terrestrial only	Multi-channel
	%	%	%	%	%	%
Base: All respondents	1470	1433	621	807	230	1203
Programme sponsorship	73	80	81	79	71	81
Programme trailers	75	82	83	82	73	84
Channel promotions	65	76	78	74	66	77

*Don't knows' and 'None of these' not shown *(Q: 'Which of the following are you aware of on television?')

Table A4.19 details the trend in awareness of the three types of promotional messages over the past six years.

Table A4.19

	Awareness of three types of promotional message					
	2002	2003	2004	2005	2006	2007
	%	%	%	%	%	%
Base: All respondents	1191	1186	1034	1441	1470	1433
Programme sponsorship	91	89	78	78	73	80
Programme trailers	75	72	79	79	75	82
Channel promotions	62	56	71	71	65	76

*Don't knows' and 'None of these' not shown *(Q: 'Which of the following are you aware of on television?')

Attitudes towards advertising

The survey then presented respondents with a series of attitude statements on a four-point scale ranging from 'frequently' to 'never' about advertising, asking: 'How often, if at all, do you find advertisements on television...'

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

The words in bold are used as abbreviations in Table A4.20 – a summary of responses of those who said 'frequently' or 'sometimes'. Respondents could answer on a four-point scale, from 'frequently' to 'never'. They could also respond with 'don't know'.

Overall, the figures remained relatively unchanged from 2006. The two top mentions were that advertisements '*interfere with the enjoyment of programmes*', mentioned by 81% of all respondents, and the same proportion felt that advertisements were frequently or sometimes '*well produced*'. Overall, the number of respondents who thought that television advertising '*often encouraged negative or harmful stereotypes*' was little changed since last year; this was also the case for the number of respondents mentioning advertisements '*are clever*'. Compared to 2006, there was a decline in the number of respondents claiming that advertisements were '*informative*', '*truthful*', '*give you something to talk about*', and '*are embarrassing*'.

Table A4.20

General attitudes to television advertising				
Frequently or sometimes find advertisements . . .				
	2004	2005	2006	2007
Base: All respondents	2070	1441	1470	1433
	%	%	%	%
Interfere	77	78	79	81
Well produced	n/a	80	80	82
Clever	79	77	78	77
Too loud	63	63	66	68
Informative	65	66	68	63
Undesirable	67	69	65	64
Truthful	60	59	63	59
Talk about	54	53	53	51
Stereotypes	54	60	57	57
Embarrassing	30	36	32	29

*(Q: 'How often, if at all, do you find advertisements on television are.....?')

Levels of television advertising

Respondents were asked what they thought about the current levels of advertising: 'Bearing in mind that advertising provides the money to pay for programmes on ITV1, Channel 4 and Five, which of these statements best describes how you feel about the amount of advertising on these channels?' Overall, 40% of all respondents said that there was already more advertising than they were happy with. The same proportion claimed that they were happy with the current level but would not want it to increase. Three per cent said that it could go up quite a bit before it bothered them, and one in ten claimed that advertising levels could go up a little more. Table A4.21 shows the responses given by terrestrial-only viewers, and Table A4.22 shows the responses given by multichannel viewers.

Table A4.21

Attitudes to amount of advertising on terrestrial channels, among analogue terrestrial only viewers					
	2003	2004	2005	2006	2007
Base	550	381	459	346	258
	%	%	%	%	%
More would be acceptable	17	12	9	10	10
Current amount acceptable	50	45	41	34	38
Too much already	31	34	36	41	39

* Don't knows and not bothered not shown *(Q: 'Bearing in mind that advertising provides the money to pay for programmes on ITV1, Channel 4 and Five, which of these statements best describes how you feel about the amount of advertising on these channels?')

Table A4.22

	Attitudes to amount of advertising among multichannel viewers									
	Advertising on Channels 3-5					Advertising on other channels				
	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007
Base: All with satellite and cable TV	601	658	682	708	711	601	658	682	708	711
	%	%	%	%	%	%	%	%	%	%
More would be acceptable	17	15	10	15	13	15	14	11	11	13
Current amount acceptable	50	49	43	40	39	46	38	37	32	31
Too much already	32	32	40	37	40	35	42	46	45	46

*Don't knows and not bothered not shown *(Q: 'Bearing in mind that advertising provides the money to pay for programmes on ITV1, Channel 4 and Five, which of these statements best describes how you feel about the amount of advertising on these channels? How about on satellite, cable and digital channels?')

Almost the same proportion of analogue terrestrial-only viewers and those with cable or satellite TV access felt that the current amount of advertising on terrestrial channels was acceptable (38% and 39% respectively). However, comparing 2007 figures with 2003 figures, we can see that there has been a steady increase, both in the number of analogue terrestrial-only respondents, and in the number of respondents with access to cable and satellite TV, who think that there is already too much advertising on terrestrial channels. There has also been an increase in the proportion of cable and satellite viewers who think that there is already too much advertising on non-terrestrial channels, 46% in 2007 compared to 35% in 2003.

Misleading and offensive advertisements

All respondents were also asked whether they had ever found advertisements to be misleading. They could answer 'frequently', 'sometimes', 'rarely', 'never' or 'don't know'. Table A4.23 details the responses.

Table A4.183

	Frequency of encountering misleading advertisements on television			
	2004	2005	2006	2007
Base: All respondents	2070	1441	1470	1433
	%	%	%	%
Frequently	9	7	6	8
Sometimes	30	29	31	28
Rarely	19	19	20	19
Never	38	39	36	40

*Don't knows not shown *(Q: 'How often if at all have you found that advertisements on television give you an impression of products or services which you later found to be wrong or misleading?')

Respondents were more likely to have 'frequently' or 'sometimes' encountered a misleading advert than one that had offended them (Table A4.24). Younger respondents were more likely to say they had never been offended.

Table A4.24

	Frequency of encountering offensive advertisements on television			
	2004	2005	2006	2007
Base: All respondents	2070	1441	1470	1433
	%	%	%	%
Frequently	3	4	3	2
Sometimes	20	25	22	18
Rarely	33	29	31	30
Never	44	41	42	49

**(Q: 'How often if ever have you found advertisements on television to be offensive?')*

Respondents who had seen an offensive advertisement were asked whether they thought that there was a time of day when the advertisement that offended them would be more acceptable. The majority, 56%, said 'no', while 36% said 'yes'. Those respondents who felt that the advert(s) which had offended them would be more acceptable if it were shown at a different time were asked when that time should be. The majority response (35%) was 'after 9pm'.

Annex 5

Glossary

Average headline broadband speeds or blended headline speeds, are the figures identifying for the maximum speed attainable on broadband.

Average Weekly Reach (TV) The number of adults aged 4+ who watch at least fifteen consecutive minutes of a specified TV channel or genre in a specific week (or in an average week over a longer period).

BARB The pan-industry body which measures television viewing (Broadcasters' Audience Research Board).

CAGR Compound Annual Growth Rate - The year-over-year growth rate over a specified period of time.

Communications Act Communications Act 2003, which came into force in July 2003.

DVR A Digital Video Recorder is a digital TV set top box which includes a hard disc drive allowing users to time-shift their viewing through recording, pausing and rewinding live TV

HD TV High definition television. A technology that provides viewers with better quality, high-resolution pictures.

IPTV or **Internet Protocol Television** is television and/or video signals that are delivered to subscribers or viewers using Internet Protocol (IP), the technology that is also used to access the Internet. Typically used in the context of streamed linear and on demand content, but also sometimes for downloaded video clips.

NAR Net Advertising Revenue.

On-demand or **Television on-demand** Programme or film sent independently to a customer in response to his individual request. This contrasts with broadcast television which is sent simultaneously to all customers able to receive it. Also known as video-on-demand.

Peak time The period during which a television channel broadcasts its early- and mid-evening schedule, typically used by Ofcom to refer to the period between 18:00 and 22:30 each day (including weekends).

Share (TV) Proportion of total TV viewing to a particular channel over a specified time period.

Simulcasting The broadcasting of a television programme service on more than one transmission technology (e.g. analogue and digital terrestrial television, digital terrestrial and satellite).

SOPPs (Statements of Programme Policy) The annual process by which independent PSB broadcasters produce statements of programme policy, and reviews of the previous year's output. This was introduced by the 2003 Communications Act and is a statutory requirement.

Total viewing hours The total hours of viewing by an average individual (4+) to a given programme genre in a year.