

A - PSB Audience Impact

July 2013

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Background

Background (1) – PSB tracker overview

- Based on the public service purposes presented in the 2003 Communications Act, Ofcom developed a range of PSB purposes and characteristics in its first PSB review in 2005*. The PSB channels (BBC One, BBC Two, ITV, Channel 4, Channel 5, BBC3, BBC4, BBC News, S4C) are expected together to fulfil the purposes and characteristics, although it is also acknowledged that each PSB channel has a specific remit.
- The PSB Tracker asks respondents to rate specific TV channels on each of the PSB purposes and characteristics relevant to that channel.
- The PSB purposes and characteristics were put into everyday language for the PSB Tracker survey, which asked respondents to give their opinions on the PSB statements, both in terms of the importance of these and the delivery of these by the PSB channels (see next slides).
- Regular viewers of each channel were asked to rate the channel on the statements using a 10-point scale. 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.
- Note: The survey reports the opinions of (self-defined) regular viewers of each PSB channel, on the delivery of PSB purposes and characteristics. 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 involves.
- Both regular and occasional viewers of each channel were also asked to rate the delivery of the purposes and characteristics when thinking about the PSB channels as a whole.
- All respondents were also asked to rate how important it is that the PSB channels together fulfil the PSB purposes and characteristics, again using a 10-point scale.
- Respondents were asked to rate each channel, all channels combined, and importance for the first statement, and then rate them for the second statement, etc.
- The order of statements and channels within each section was rotated to prevent order bias

* http://stakeholders.ofcom.org.uk/binaries/consultations/psb2/summary/psb_phase2.pdf

Background (2) – PSB tracker survey 2012



- It is important to note that in 2011 Ofcom changed the methodology for the tracker:
 - A change in sample size from approximately 7000 telephone interviews per year, to 3000
 - Fieldwork moved to continuous research throughout the year, rather than quarterly interviewing
 - An increase in the number of quotas
 - The profile of individual quotas was also updated
 - A streamlining of the questionnaire length by focusing on essential questions:
 - Opinions of Non-PSB digital channels were removed from the questionnaire
 - A range of questions relating to the importance and delivery of PSB content online were removed
 - However, respondents still rate overall opinion of the individual BBC and Channel 4 websites
 - A change in the number of PSB purposes and characteristics statements against which the PSB channels are measured, which resulted in a reduction from 20 to 13
 - Some of the statements were modified (see later chart for details)
 - Moved to a 'purer' way of measuring self-defined 'regular viewers'
 - Overall reduction in interview length from 25 to 20 minutes
 - The questionnaire was amended slightly in 2012, with viewers that watch a channel 'at least weekly' asked to rate that channel (regardless of whether they claimed to be a "regular" viewer or not). However to ensure reporting is consistent, this group is not included in the results in this report.
 - As a result, the length of interview was extended to approximately 22 minutes.
- Fieldwork was conducted by BDRG Continental
- Throughout this document, only statistically significant differences will be reported within the text and also highlighted on the charts. Reported differences between survey figures are significant at the 99% level to accommodate the impact of sample design and weighting. This means that there is high level of confidence that any reported differences reflect a true attitudinal or behavioural change rather than being caused by a change in sample methodology or profile. In previous reports, significance testing was performed at the 95% level so this represents a more robust approach to reporting. As mentioned later, due to re-weighting of historic data, significant differences between 2007/2010 and 2011/2012 are not shown.

Background (3) – Measures evaluated (i)

PSB purposes and characteristics	PSB Tracker statements 2011-2012
<p>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</p>	<p>Its news programmes are trustworthy.</p> <p>Its programmes help me understand what's going on in the world today.</p> <p>Its regional news programmes provide a wide range of good quality news about my area.*</p>
<p>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</p>	<p>It shows interesting programmes about history, sciences or the arts.</p>
<p>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</p>	<p>It shows high quality soaps or dramas made in the UK.</p> <p>Provides a wide range of high quality and UK-made programmes for children.</p> <p>Provides a wide range of high quality and UK-made programmes for older children.**</p> <p>It portrays my region (IN ENGLAND)/Scotland/Wales Northern Ireland (IN OTHER NATIONS) fairly to the rest of the UK.*</p>
<p>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</p>	<p>Its programmes show different kinds of cultures within the UK.</p>

*A number of statements were changed in 2011 – see following charts

**Only asked of parents of 12-15 of year olds that watch Channel 4

Background (4) – Statements evaluated (ii)



PSB purposes and characteristics	PSB Tracker statements 2011-2012
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 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.

*A number of statements were changed in 2011 – see following charts

Background (5) - Statement changes in 2011



Pre 2011 statement	Notes on pre 2011 statement	2011 onwards statement	Notes on 2011 onwards statement
<i>Its (regional)/ news programmes for people in Scotland/ Wales/N.Ireland provide a wide range of good quality news about my area/ Scotland /Wales, N.Ireland</i>	Statement was customised to nation. “regional” and “my area” only used in England.	<i>Its regional news programmes provide a wide range of good quality news about my area.</i>	Same statement used across all nations.
<i>It portrays my region (IN ENGLAND)/Scotland /Wales/N.Ireland well to the rest of the UK</i>	Statement customised to nation. “my region” used in England instead of nation’s name	<i>It portrays my region (IN ENGLAND)/Scotland /Wales/N.Ireland fairly to the rest of the UK</i>	Only change was that “well” was changed to “fairly”
<i>It shows enough new programmes, made in the UK</i>		<i>It shows new programmes, made in the UK</i>	Only change was that “enough” was removed
<i>Provides a wide range of high quality and UK made programmes for children</i>	Asked as part of main statement bank		Moved to later in the questionnaire.
<i>Provides a wide range of high quality and UK made programmes for older children</i>	Not asked	<i>Provides a wide range of high quality and UK made programmes for older children</i>	Asked only of parents of 12-15 year old Channel 4 viewers

2012 Methodology – further detail

- Telephone interviews (CATI) with UK adults aged 16+.
- Interview length – c.22 minutes.
- Fieldwork run across the year, from March-December.
- 3,025 interviews (1,615 in England; 502 in Scotland; 454 in Wales; 454 in Northern Ireland).
- Quotas are applied and survey data is weighted to be nationally representative of adults 16+. Weights applied to: Gender, Age, Nation and Region, Social grade, Working status and Ethnicity.
- An additional 'Welsh Boost' survey was conducted among respondents living in Wales who watch S4C.
- Unless stated otherwise, analysis is based on self-defined regular viewers of each channel.

- A full technical appendix can be found here:
- <http://stakeholders.ofcom.org.uk/binaries/research/statistics/july2013/DAppendix.pdf>

Methodology prior to 2011 – further detail

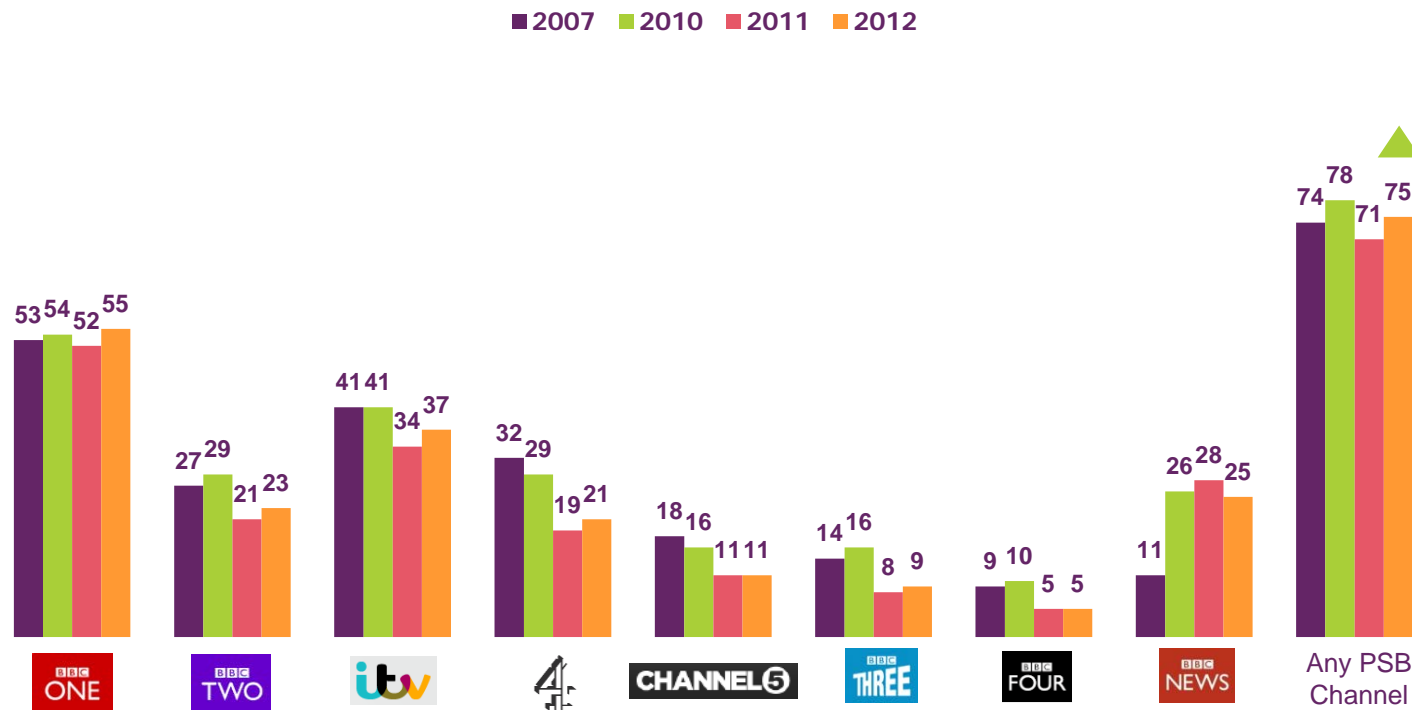
- Telephone interviews (CATI) with UK adults aged 16+.
- Interview length – 25 minutes
- Fieldwork each year spread over 1 month, four times a year (i.e. quarterly).
- Fieldwork dates: October 2005, January 2006, April 2006, July 2006, October 2006, January 2007, April 2007, July 2007, October 2007, January 2008, April 2008, July 2008, October 2008, January 2009, April 2009, July 2009, October 2009, Jan 2010, April 2010, July 2010, October 2010.
- 1,750 interviews in total conducted each quarter (1,000 in England; 250 in Scotland; 250 in Wales; 250 in Northern Ireland).
- Quotas are applied and survey data is weighted to be nationally representative of adults 16+. Weights applied to: Gender, Age, Region, Social grade and Ethnicity.
- An additional ‘Welsh Boost’ survey of 50 interviews is conducted each quarter, among respondents living in Wales who watch the Welsh language programmes on S4C.
- Unless stated otherwise, analysis is based on self-defined regular viewers of each channel.
- Full details of the change in methodology can be found here:
<http://stakeholders.ofcom.org.uk/binaries/research/statistics/july2013/DAppendix.pdf>

Results prior to 2011

- The changes in methodology mean that the historic data is not directly comparable to that from 2011 onwards.
- However in order to provide context to the results from 2011 onwards, the 2007 and 2010 data have been reweighted. Therefore differences between results from 2011 onwards and previous years' may not be real changes, due to the change in methodology, or a combination of factors
- Due to the reweighting, the figures for 2007 and 2010 are different to those previously published for these years.
- The weights were created by looking at the profile of BBC mainstream viewers, BBC digital viewers and viewers of ITV, C4 and Channel 5 in terms of their age and whether or not they viewed at least one channel in each group regularly. The weights were applied to ensure that the percentages in each group were consistent in 2007, 2010 and 2011. This was in addition to rim weights which were then applied to the demographic weights. These weights were used to reweight the 2007 and 2010 data. Due to the complexities of the changes, it does not cover all differences between the datasets but allows sanity checking of any significant change.

Overview of PSB television









Fig 1 Proportion of UK sample that are self-claimed regular viewers



▲ Shows significant differences from 2011 to 2012 at 99% level

Base: All respondents (7192, 6964, 3109, 3025)

Fig 2 Proportion of sample that are self-claimed regular viewers of each channel, within subgroups

									Any PSB Channel
Total regular viewers (% of Total)	55	23	37	21	11	9	5	25	75
Male	56	26	31	20	10	8	6	24	73
Female	55	20	43	22	13	10	4	25	77
16-24	46	14	35	29	10	19	6	18	70
25-34	48	15	35	27	11	12	4	17	68
35-44	58	23	38	22	13	10	3	28	76
45-54	57	24	39	20	12	7	6	27	77
55-64	61	30	41	16	9	2	6	24	81
65+	61	30	34	14	12	6	7	31	78
AB	58	27	29	23	10	9	5	27	74
C1C2	54	22	39	22	11	9	5	24	74
DE	55	22	40	17	13	10	6	24	77
England	55	23	36	21	11	9	5	24	74
Scotland	58	20	43	23	12	7	5	27	78
Wales	61	28	42	24	17	12	8	31	80
N Ireland	51	18	51	28	10	10	4	22	79
White	56	24	38	21	11	9	6	24	75
MEG	47	15	27	22	12	15	3	26	69

Base: All respondents in each demographic group

Fig 3 The importance of PSB purposes 1 and 2

2012 Importance rating: 10/9/8/7

2011

2010

2007

Purpose 1

Its news programmes are trustworthy

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

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

Purpose 2

It shows interesting programmes about history, sciences or the arts



▲ Shows significant differences from 2011 to 2012 at 99% level

Extent to which the characteristics is important, where 10 means 'extremely important' and 1 means 'not at all important'

Base: All respondents (2007 = 5357, 2010 (asked of Sample A only) = 3569, 2011 = 3109, 2012 = 3025)

*NB: Before 2011 the third statement from the top asked as: 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'



Fig 4 The importance of PSB purposes 3 and 4

2012 Importance rating: 10/9/8/7

2011

2010

2007

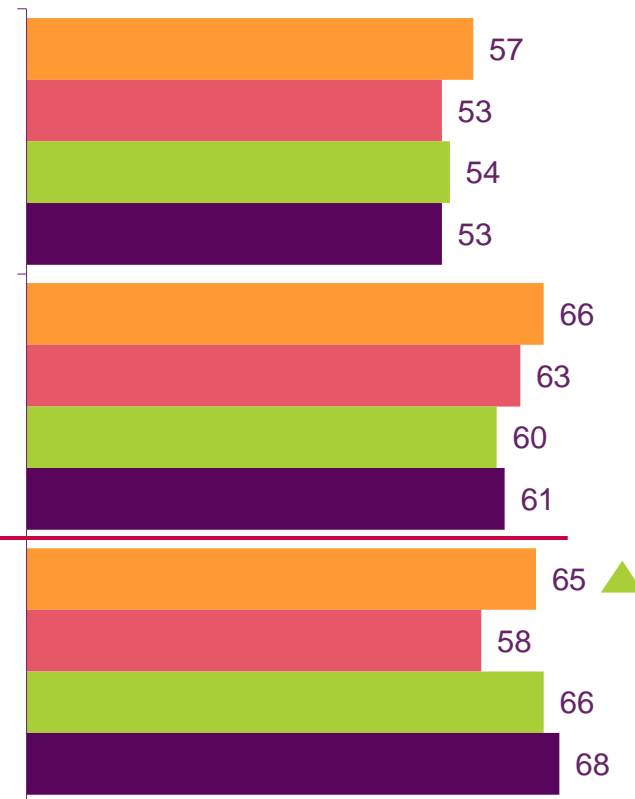
Purpose 3

It shows high quality soaps or dramas made in the UK

* It portrays my region/Scotland/Wales/Northern Ireland fairly to the rest of the UK

Purpose 4

Its programmes show different kinds of cultures within the UK



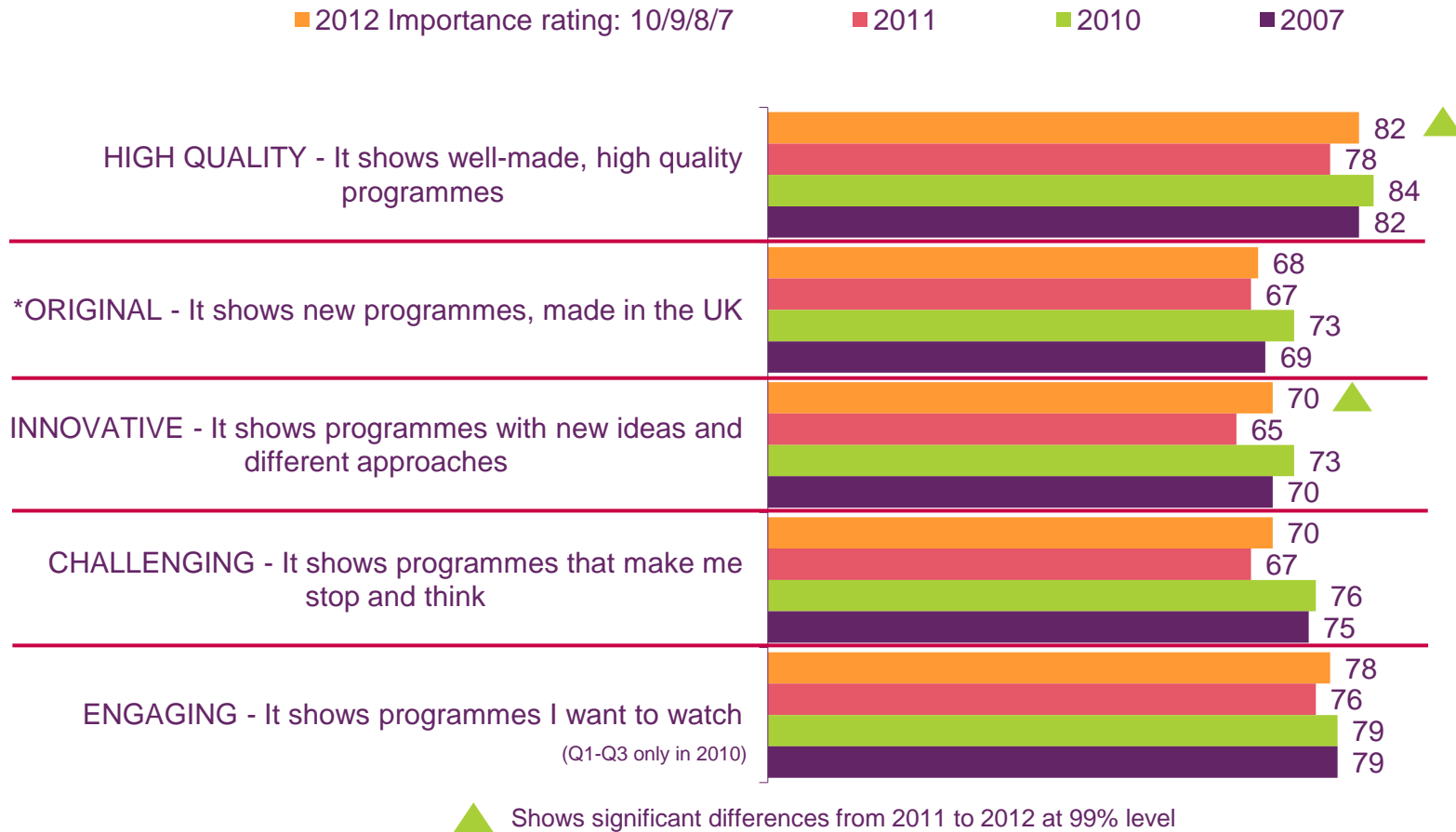
▲ Shows significant differences from 2011 to 2012 at 99% level

Extent to which the characteristics is important, where 10 means 'extremely important' and 1 means 'not at all important'

Base: All respondents (2007 = 5357, 2010 (asked of Sample A only) = 3569, 2011 = 3109, 2012 = 3025)

*NB: Before 2011 the second statement was asked as 'It portrays my region/Scotland/Wales/Northern Ireland well to the rest of the UK'

Fig 5 The importance of PSB characteristics



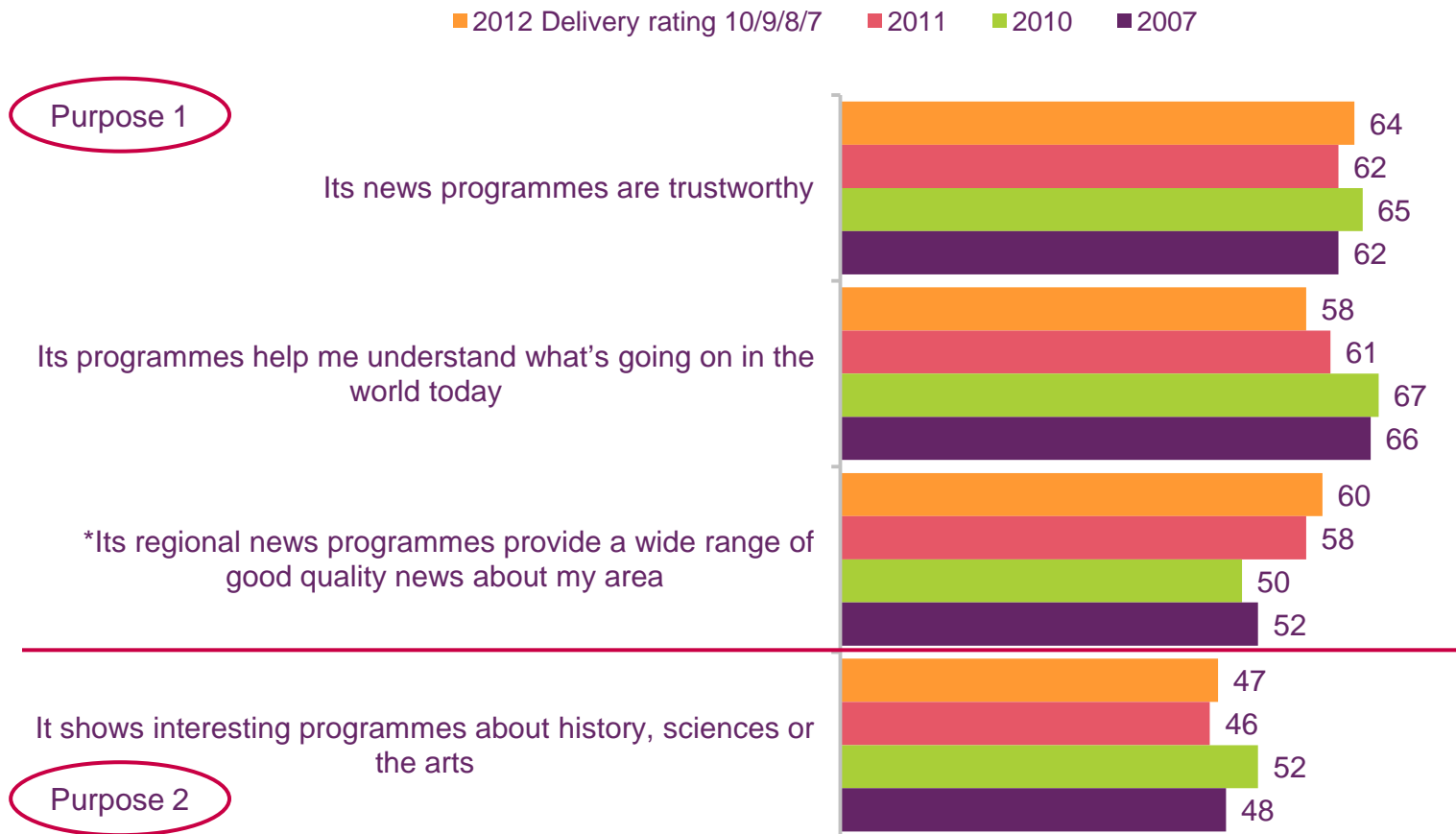
Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”

Base: All respondents (2007 = 5357, 2010 (asked of Sample A only) = 3569, 2011 = 3109, 2012 = 3025)

*NB: Before 2011 the second statement from the top asked as: ‘It shows *enough* new programmes made in the UK’.



Fig 6 The delivery of PSB purposes 1 and 2



Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.

Base: All respondents who watch any PSB channels regularly or occasionally. All Channels Combined (2007 = 7105, 2010 = 6909; 2011 = 3079, 2012 = 2983)

*NB: Before 2011 the third statement from the top asked as: 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'

Fig 7 The delivery of PSB purposes 3 and 4

2012 Delivery rating 10/9/8/7 2011 2010 2007

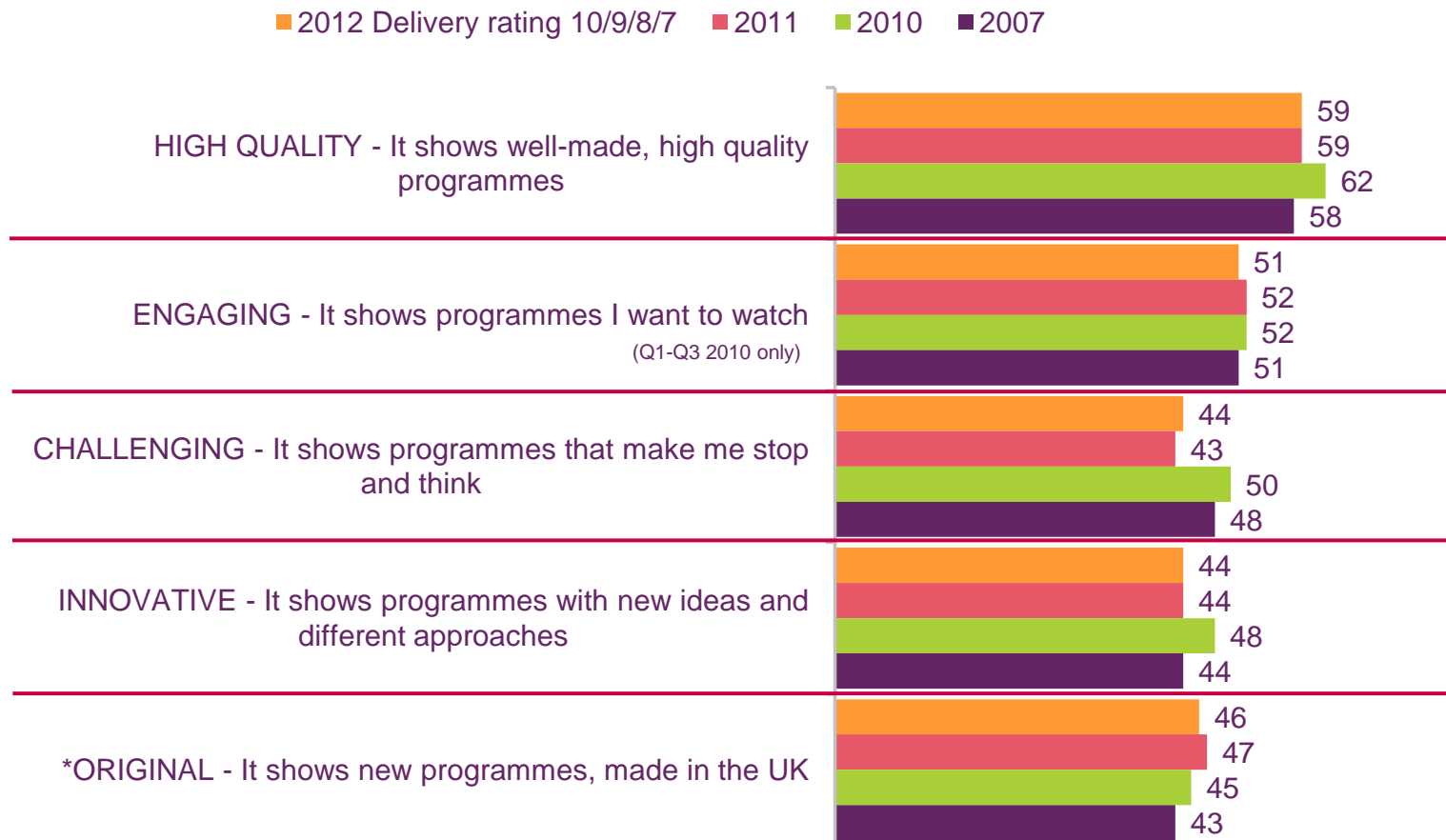


Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.

Base: All respondents who watch any PSB channels regularly or occasionally. All Channels Combined (2007 = 7105, 2010 = 6909, 2011 = 3079, 2012 = 2983)

*NB: Before 2011 the second statement from the top was asked as 'It portrays my region/Scotland/Wales/Northern Ireland well to the rest of the UK'

Fig 8 The delivery of PSB characteristics



Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.

Base: All respondents who watch any PSB channels regularly or occasionally. All Channels Combined (2007 = 7105, 2010 = 6909, 2011 = 3079, 2012 = 2983)

*NB: Before 2011 the last statement asked as: 'It shows *enough* new programmes made in the UK'



Fig 9 Summary of the importance and delivery of PSB Purposes and Characteristics 2012

Purposes	Importance	Delivery
Its news programmes are trustworthy	85%	64%
Its programmes help me understand what's going on in the world today	80%	58%
Its regional news programmes provide a wide range of good quality news about my area	78%	60%
It shows interesting programmes about history, sciences or the arts	68%	47%
It portrays my region/Scotland/Northern Ireland/Wales fairly to the rest of the UK	66%	40%
Its programmes show different kinds of cultures within the UK	65%	43%
It shows high quality soaps or dramas made in the UK	57%	47%
Characteristics		
It shows well-made, high quality programmes	82%	59%
It shows programmes I want to watch	78%	51%
it shows programmes that make me stop and think	70%	44%
It shows new programmes, made in the UK	68%	46%
It shows programmes with new ideas and different approaches	70%	44%

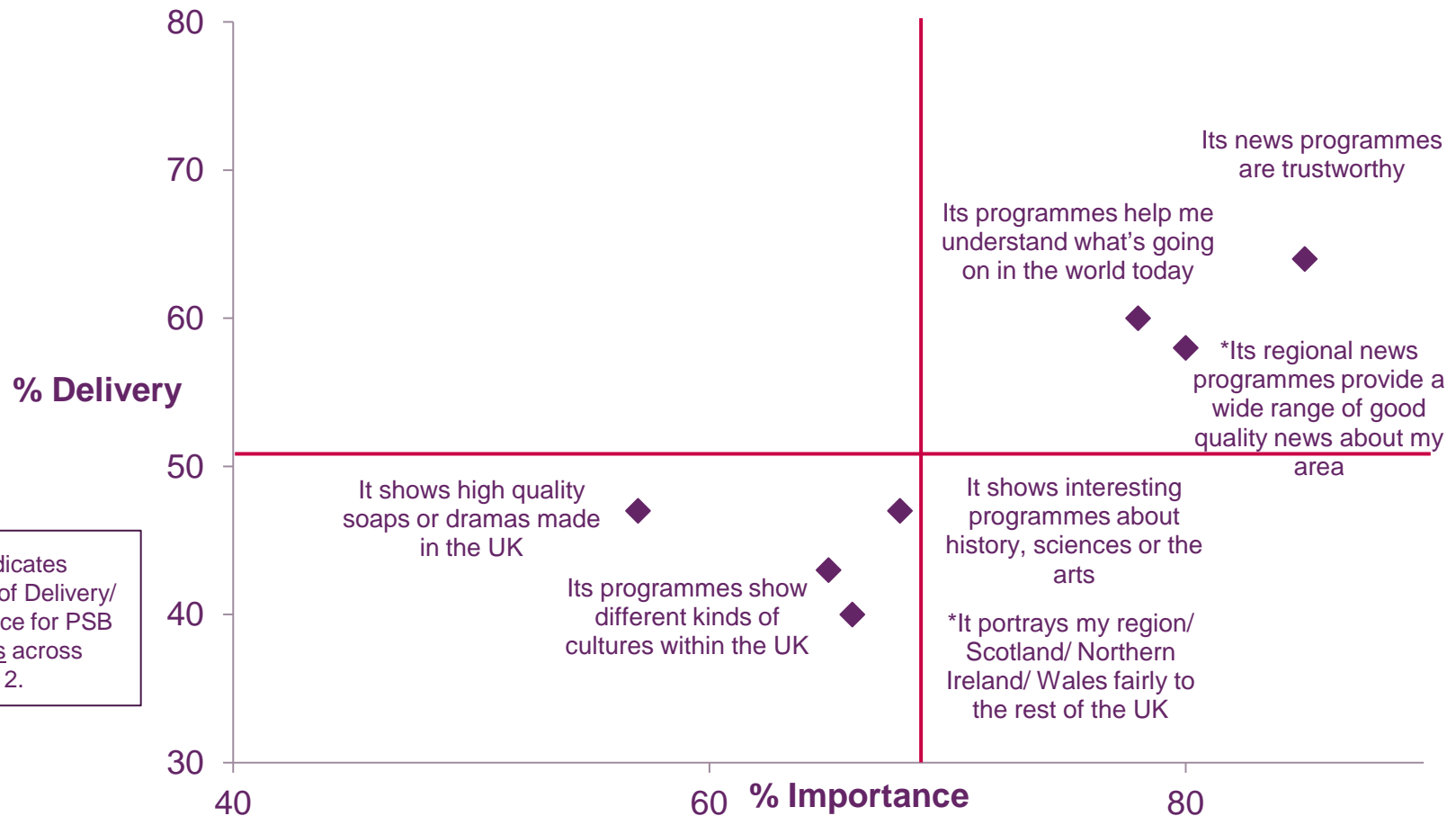
Summary % of respondents rating Importance/Delivery 10/9/8/7

Base for Importance: All respondents (3025); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (2983)

Slightly amended wording of some statements since 2011: previous wording: 'Its (regional)/ news programmes *for people in Scotland/Wales/NI* provide a wide range of good quality news about my area/ *Scotland/Wales/NI*'; 'It portrays my region/Scotland/Northern Ireland/Wales *well* to the rest of the UK'; 'It shows *enough* new programmes, made in the UK';



Fig 10a Summary of the importance and delivery of PSB purposes



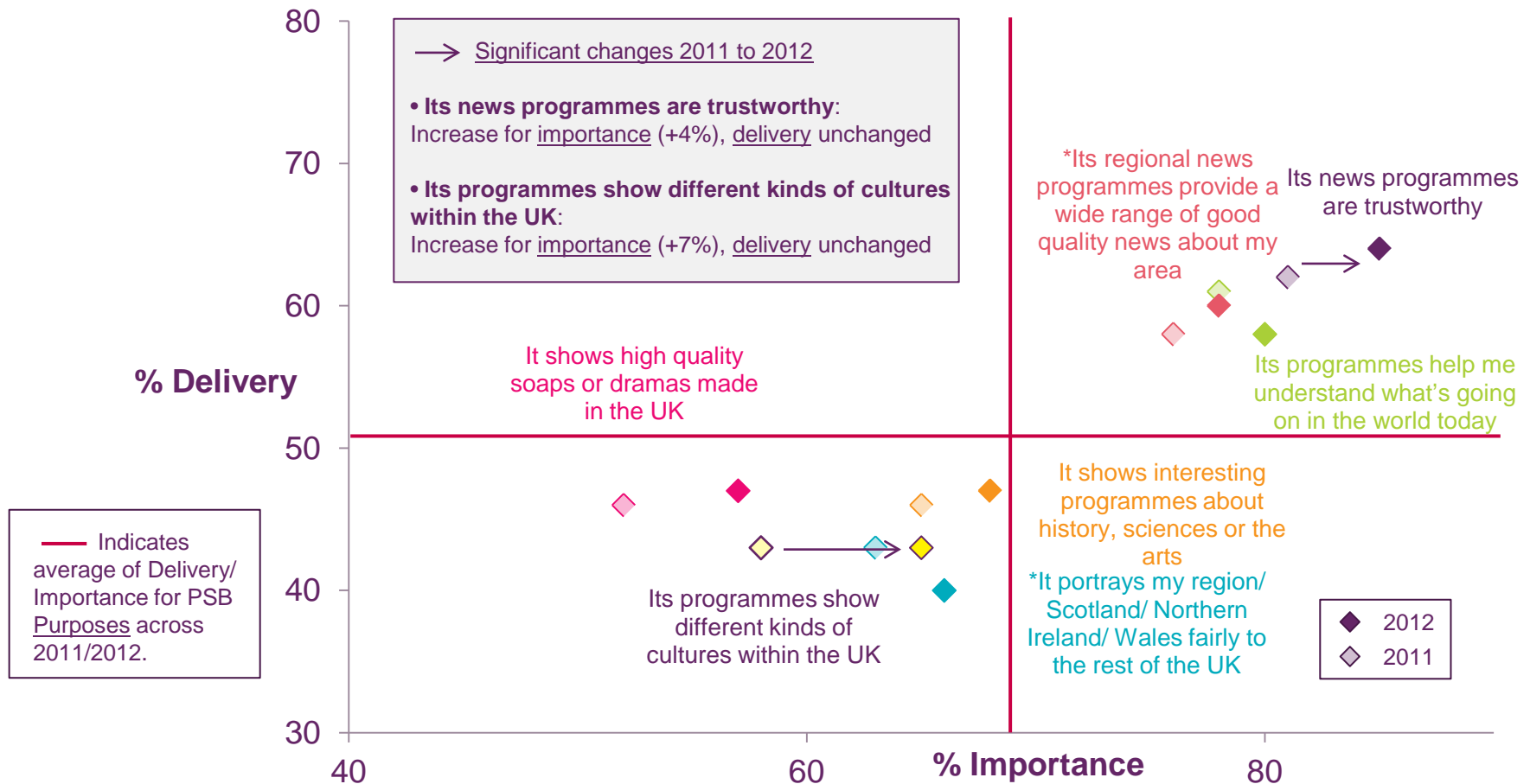
Summary % of respondents rating 10/9/8/7

Base for Importance: All (3025); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (2983)

Slightly amended wording of some statements since 2011: previous wording: 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'; 'It portrays my region/Scotland/Northern Ireland/Wales well to the rest of the UK'; 'It shows enough new programmes, made in the UK';



Fig 10b Summary of the importance and delivery of PSB purposes



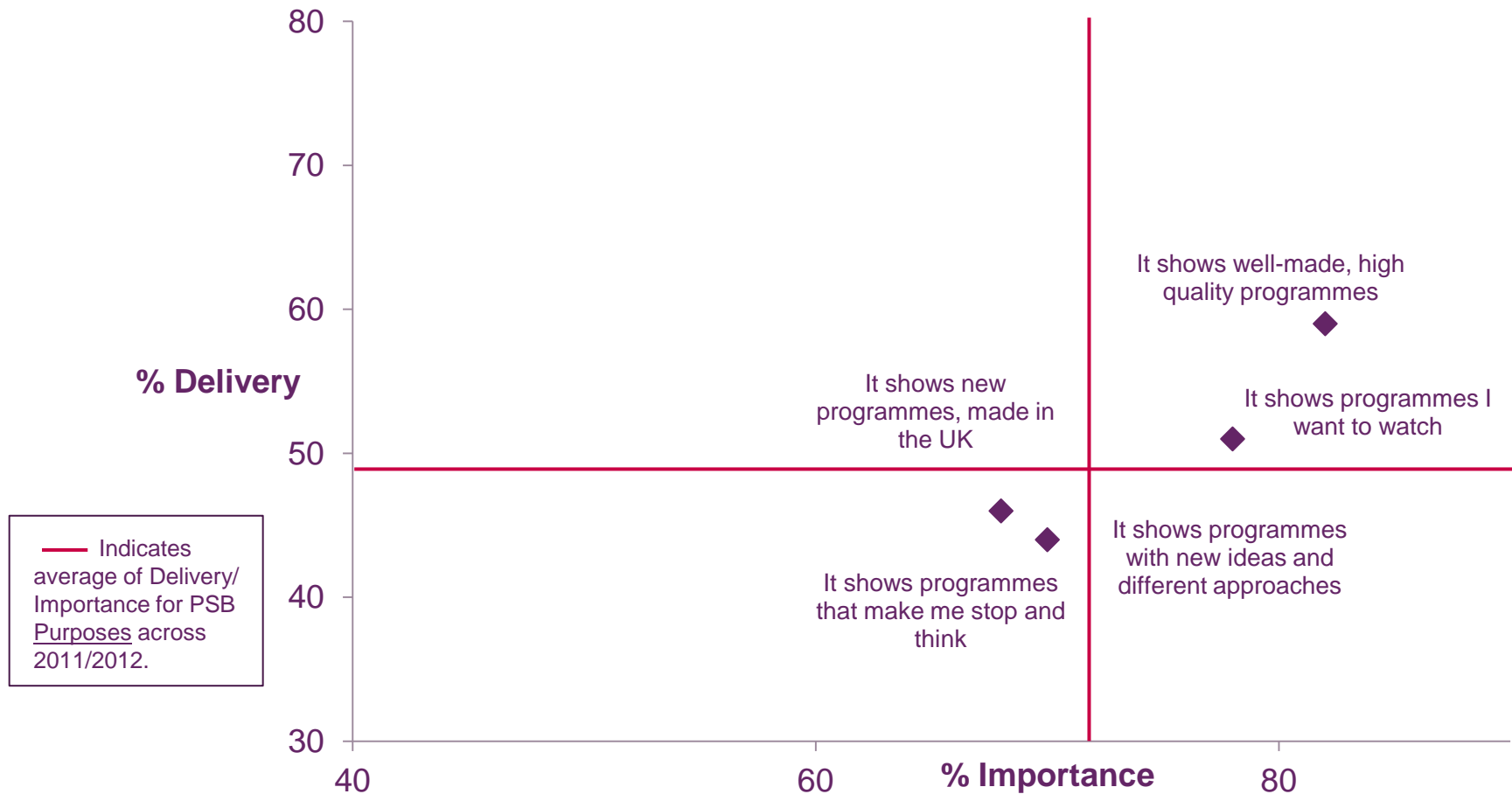
Summary % of respondents rating 10/9/8/7

Base for Importance: All respondents (3025); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally 2011 (3079), 2012 (2983)

Slightly amended wording of some statements since 2011: previous wording: 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'; 'It portrays my region/Scotland/Northern Ireland/Wales well to the rest of the UK'; 'It shows enough new programmes, made in the UK';



Fig 11a Summary of the importance and delivery of PSB characteristics



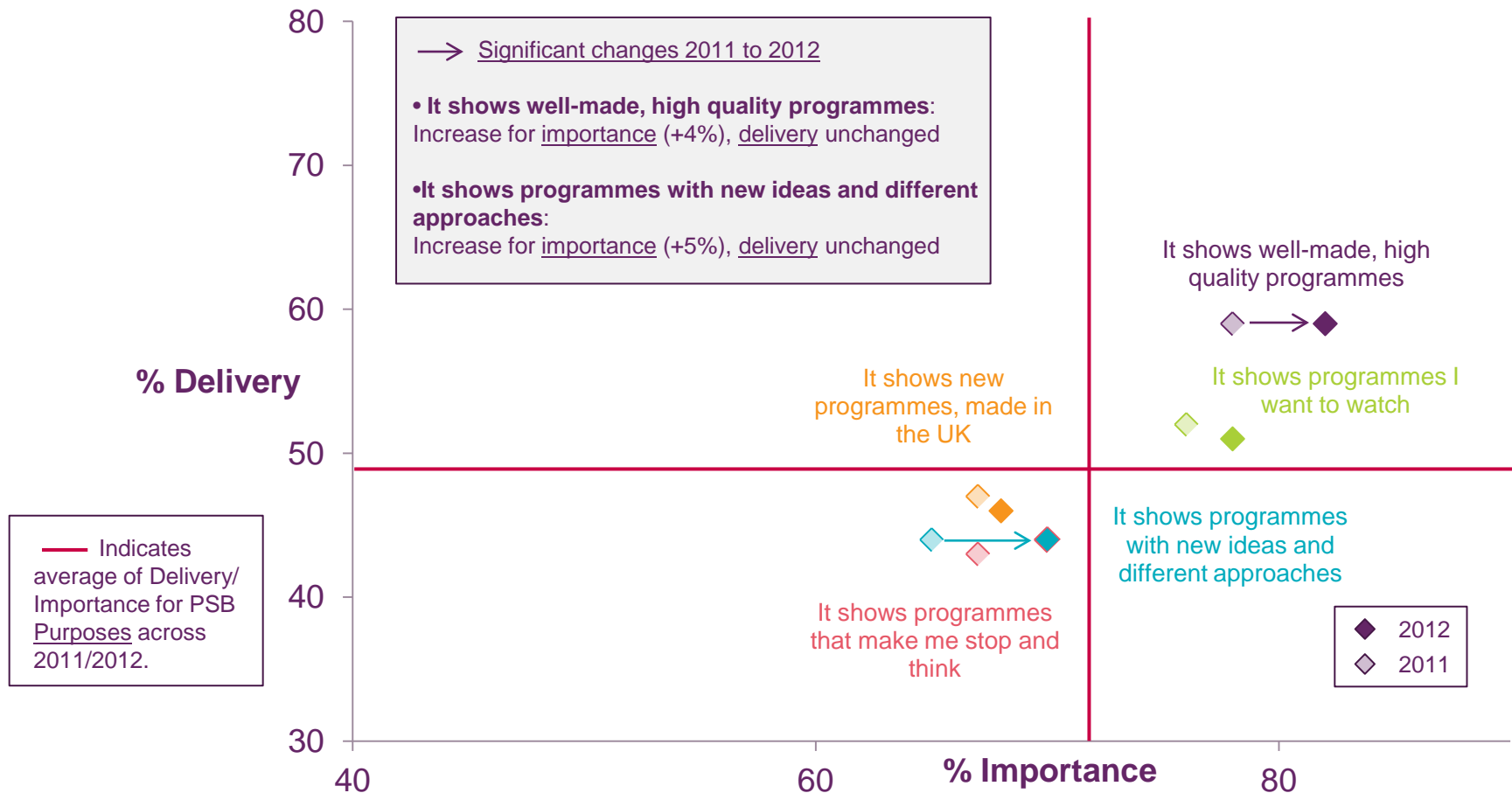
Summary % of respondents rating 10/9/8/7

Base for Importance: All respondents (3025); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (2983)

Slightly amended wording of some statements since 2011: previous wording: 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'; 'It portrays my region/Scotland/Northern Ireland/Wales well to the rest of the UK'; 'It shows enough new programmes, made in the UK';



Fig 11b Summary of the importance and delivery of PSB characteristics



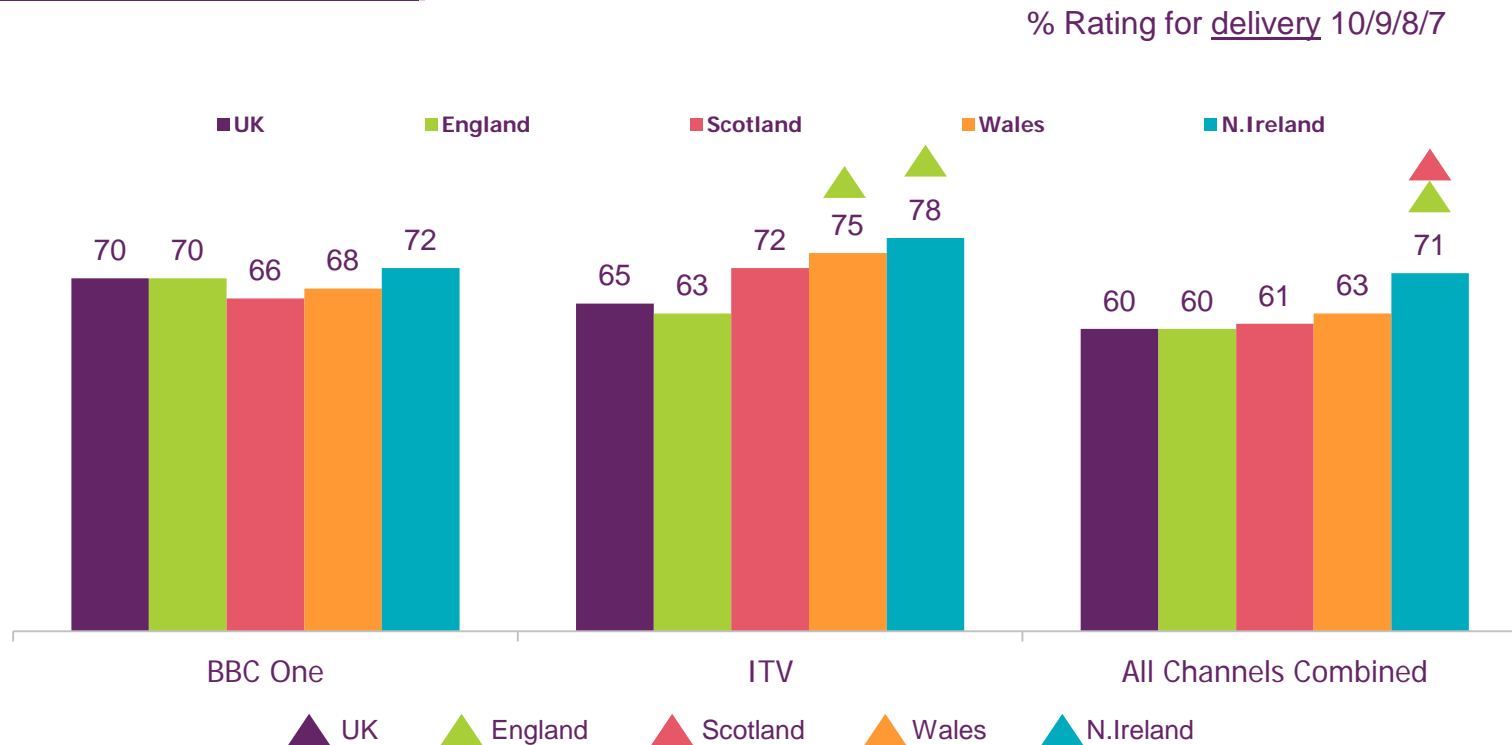
Summary % of respondents rating 10/9/8/7

Base for Importance: All (3025); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally 2011 (3079), 2012 (2983)

Slightly amended wording of some statements since 2011: previous wording: 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'; 'It portrays my region/Scotland/Northern Ireland/Wales well to the rest of the UK'; 'It shows enough new programmes, made in the UK';

PSB nations and regions news

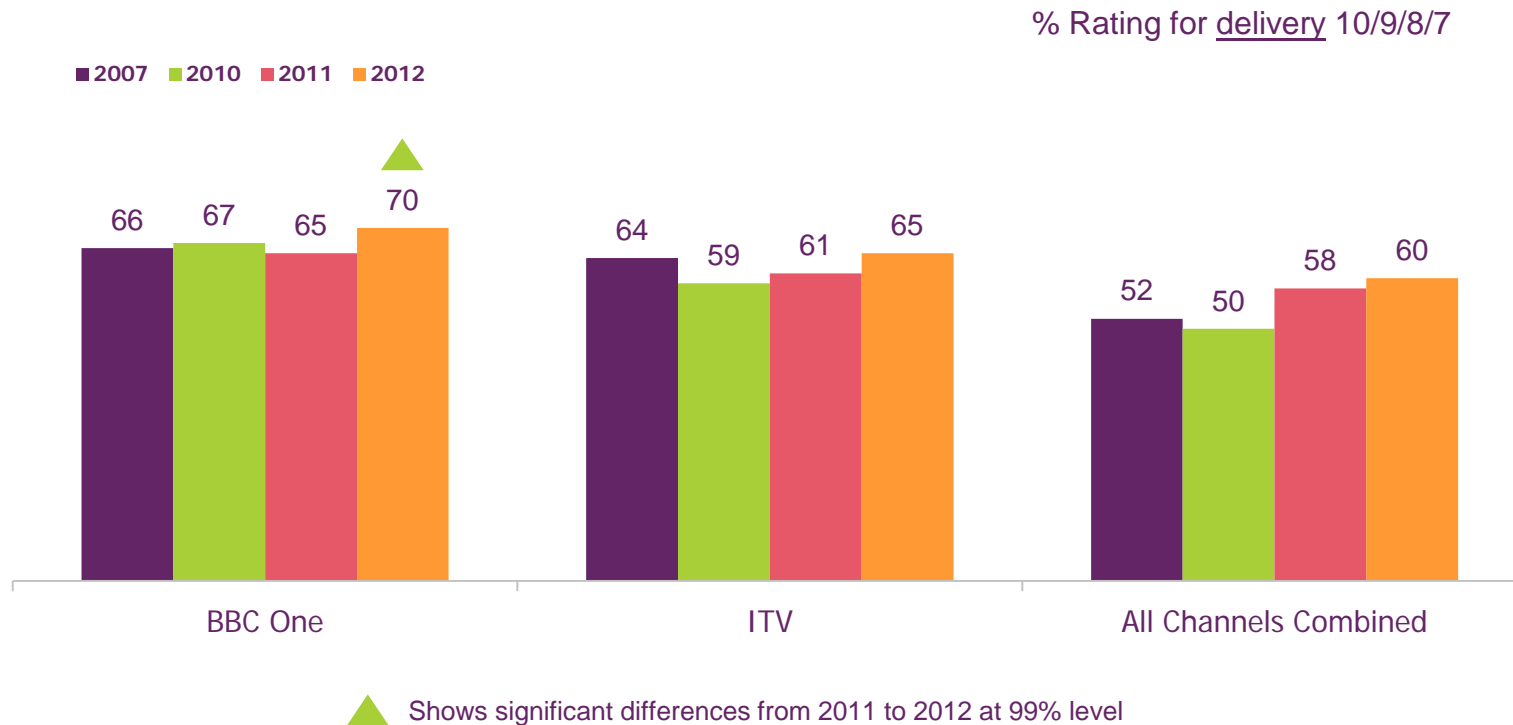
Fig 12 'Its regional news programmes provide a wide range of good quality news about my area' (2012 split by nation)



Shows significant differences between nations for BBC One/ITV/All channels combined, 99% level

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel
 Base for individual channels: Self-reported regular viewers of each in each nation (BBC One =1683,887,289,276,231. ITV = 1214,577,214,191,232)
 Base for 'All channels combined': All respondents who ever watch any PSB channels in each nation (2983,1593,493,447,450)
 NB: Before 2011 the statement was asked as 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'

Fig 13 'Its regional news programmes provide a wide range of good quality news about my area' (all nations combined)



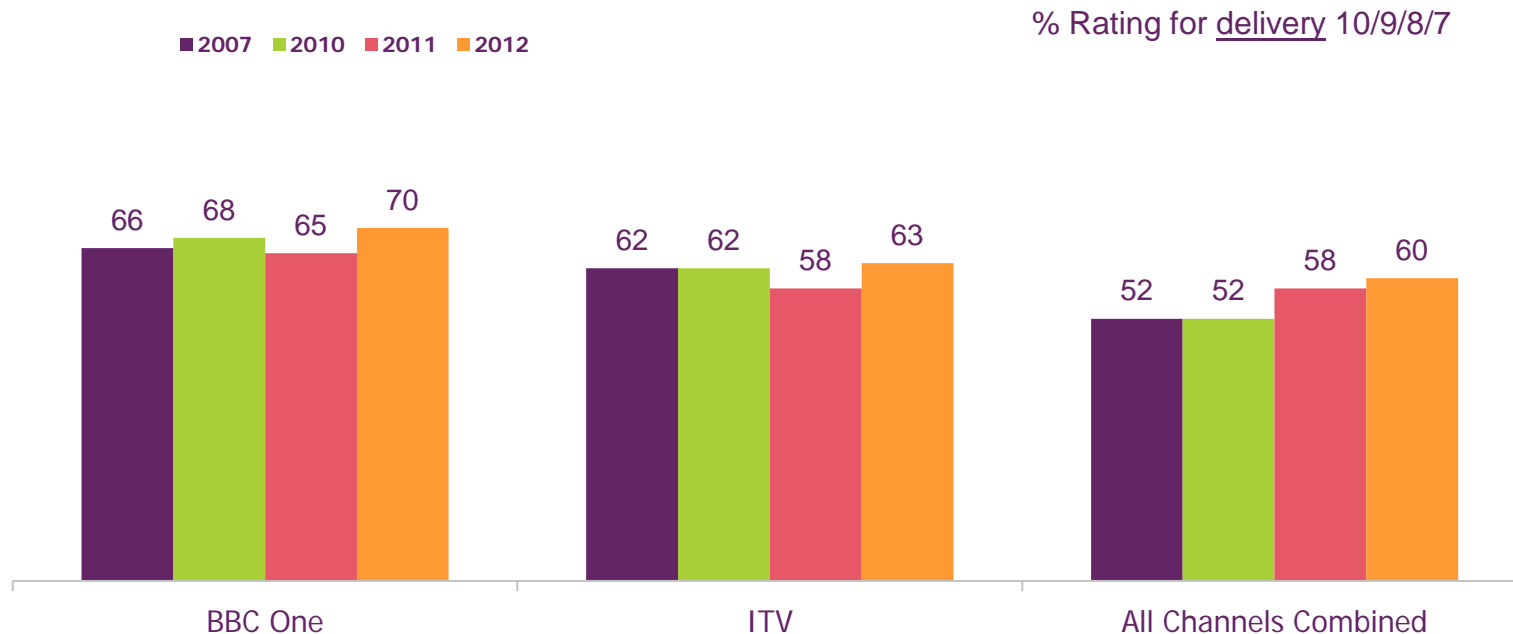
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-reported regular viewers of each channel (BBC One = 4938, 4998, 1597, 1683; ITV = 3724, 3518, 1107, 1214)

Base for 'All channels combined': All respondents who ever watch any PSB channels (7105, 6909, 3079, 2983)

NB: Before 2011 the statement was asked as 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'

Fig 14 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in England)



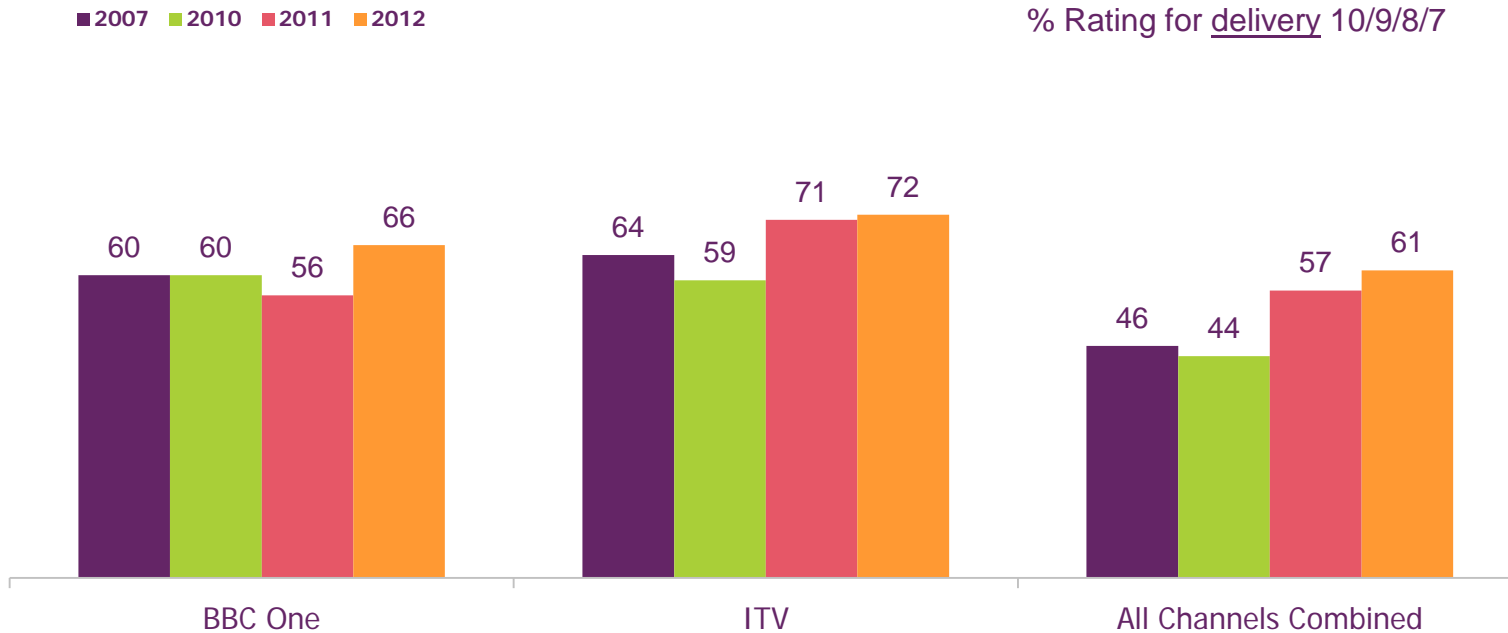
No significant differences from 2011 to 2012 at 99% level

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-reported regular viewers of each channel in England (BBC One = 2813, 2861, 861, 887; ITV = 2039, 1944, 547, 577)

Base for 'All channels combined': All respondents in England who ever watch any PSB channels (4062, 3942, 1647, 1593)

Fig 15 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in Scotland)



No significant differences from 2011 to 2012 at 99% level

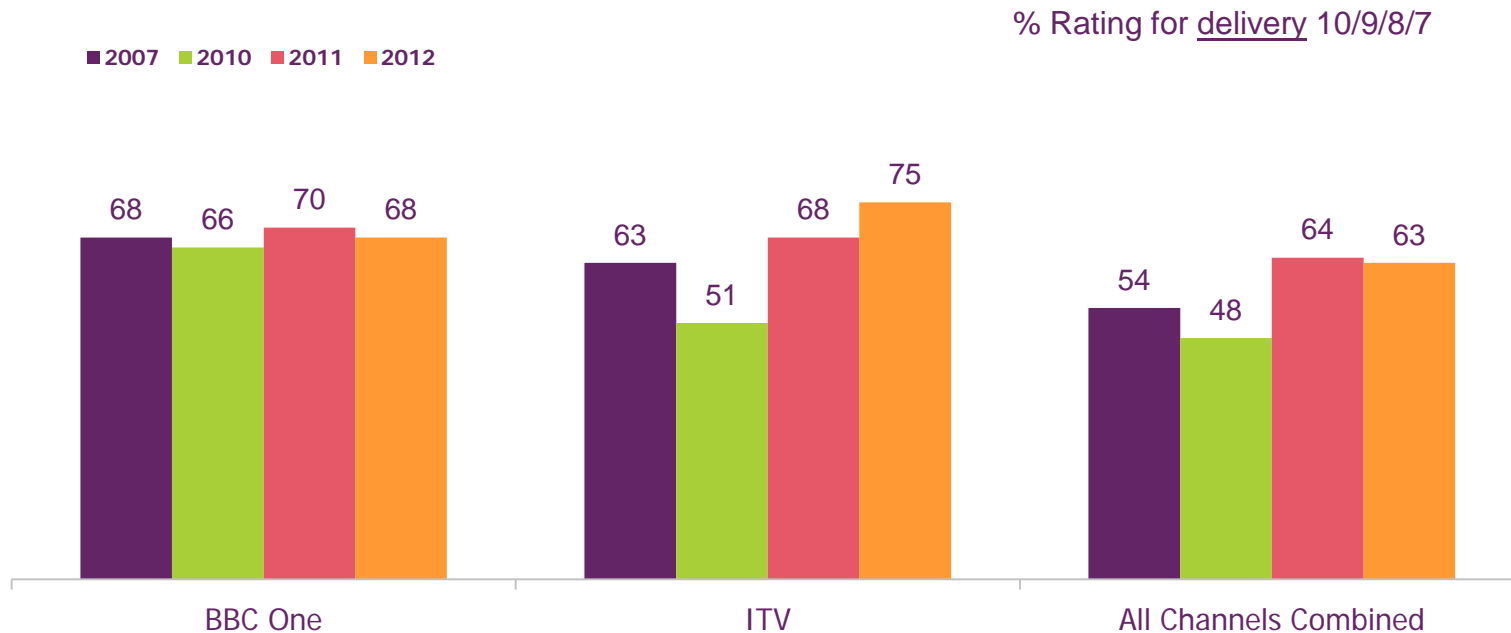
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-reported regular viewers of each channel in Scotland. (BBC One = 698, 698, 234, 289; ITV = 534, 481, 189, 214)

Base for 'all channels combined': all respondents in Scotland who ever watch any PSB channels (1022, 984, 499, 493)

NB: Before 2011 the statement was asked as 'Its news programmes for people in Scotland provide a wide range of good quality news about Scotland'

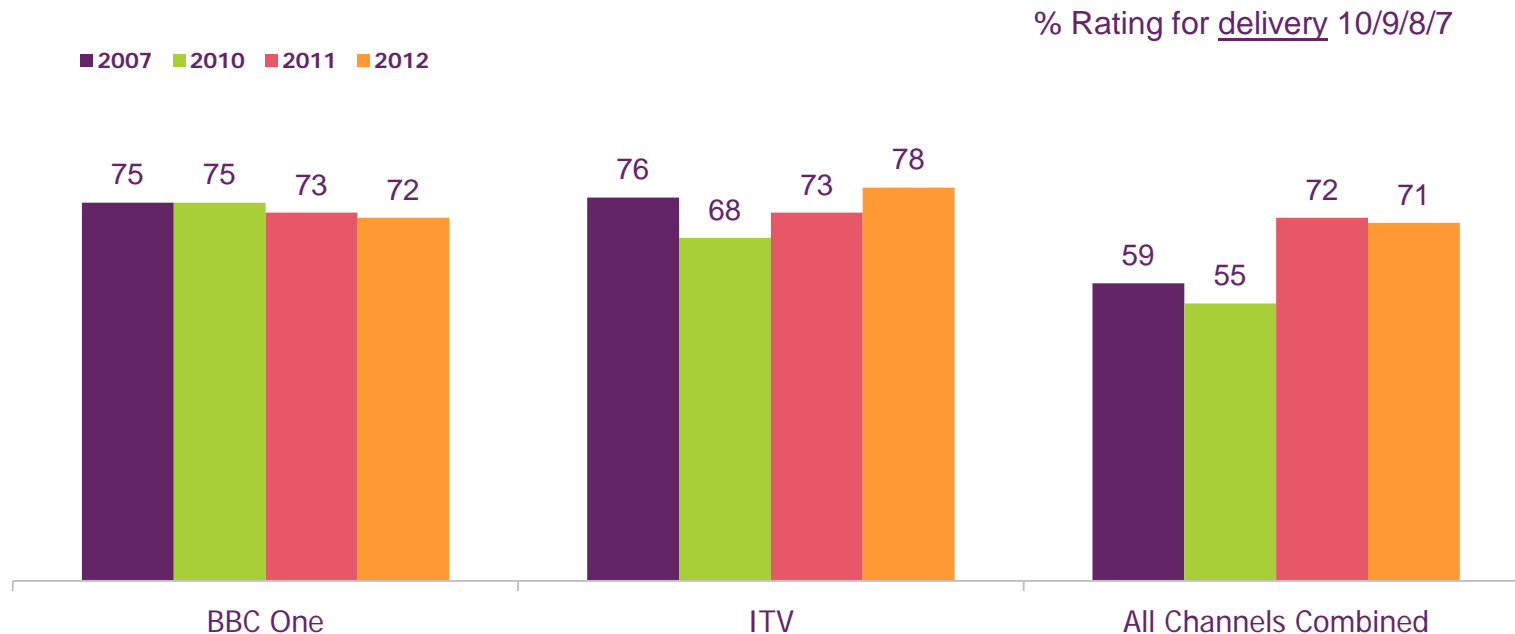
Fig 16 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in Wales)



No significant differences from 2011 to 2012 at 99% level

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel
 Base for individual channels: Self-reported regular viewers of each channel in Wales. (BBC One = 744, 758, 268, 276; ITV = 568, 511, 175, 191)
 Base for 'all channels combined': All respondents in Wales who ever watch any PSB channels (1006, 996, 474, 447)
 NB: Before 2011 the statement was asked as 'Its news programmes for people in Wales provide a wide range of good quality news about Wales'

Fig 17 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in Northern Ireland)



No significant differences from 2011 to 2012 at 99% level

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

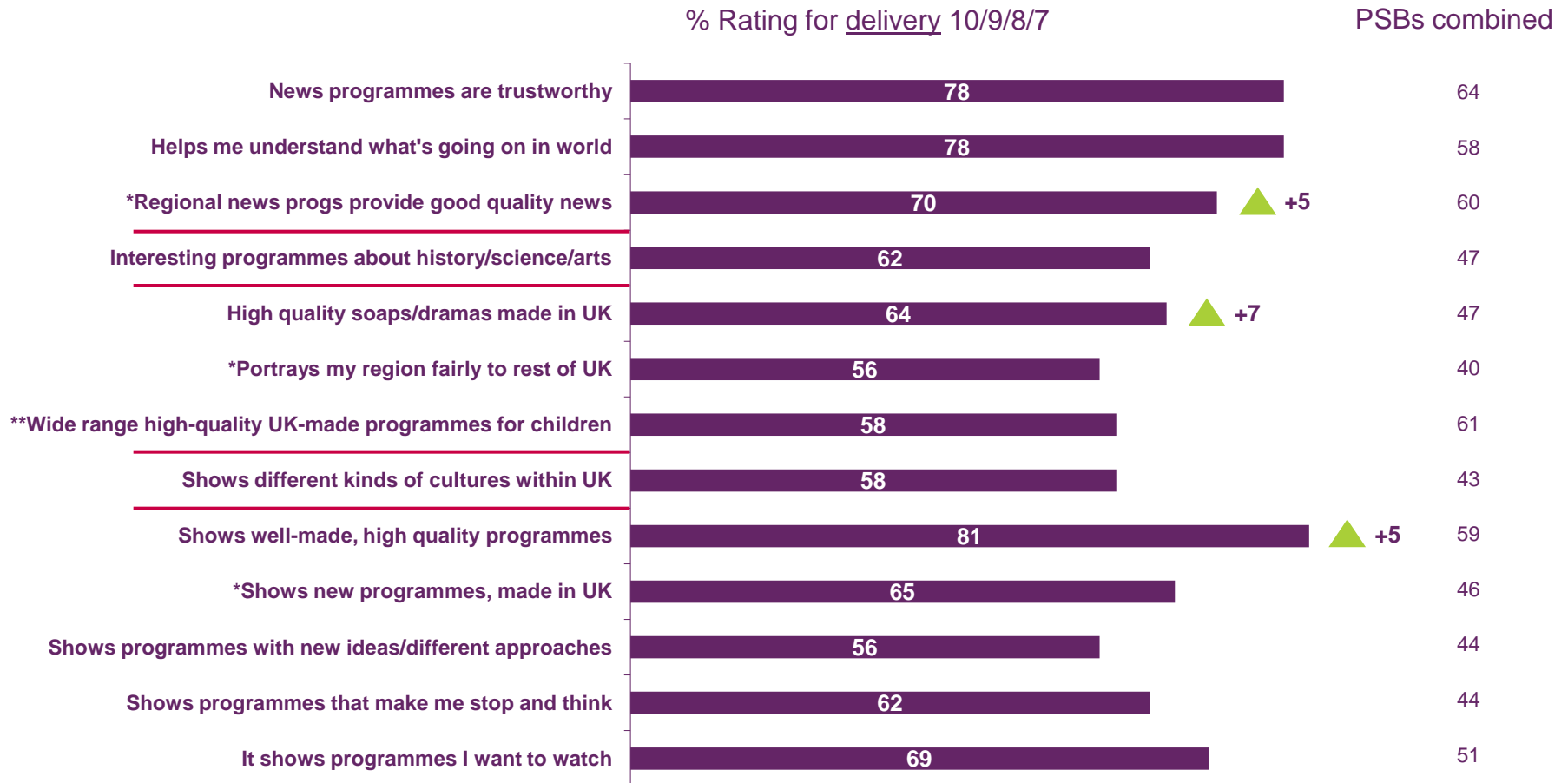
Base for individual channels: Self-reported regular viewers of each channel in Northern Ireland (BBC One = 683, 681, 234, 231; ITV = 583, 582, 196, 232)

Base for 'all channels combined': All respondents in Northern Ireland who ever watch any PSB channels (1015, 987, 459, 450)

NB: Before 2011 the statement was asked as 'Its news programmes for people in Northern Ireland provide a wide range of good quality news about Northern Ireland'

Individual PSB channel summaries

Fig 18 BBC One

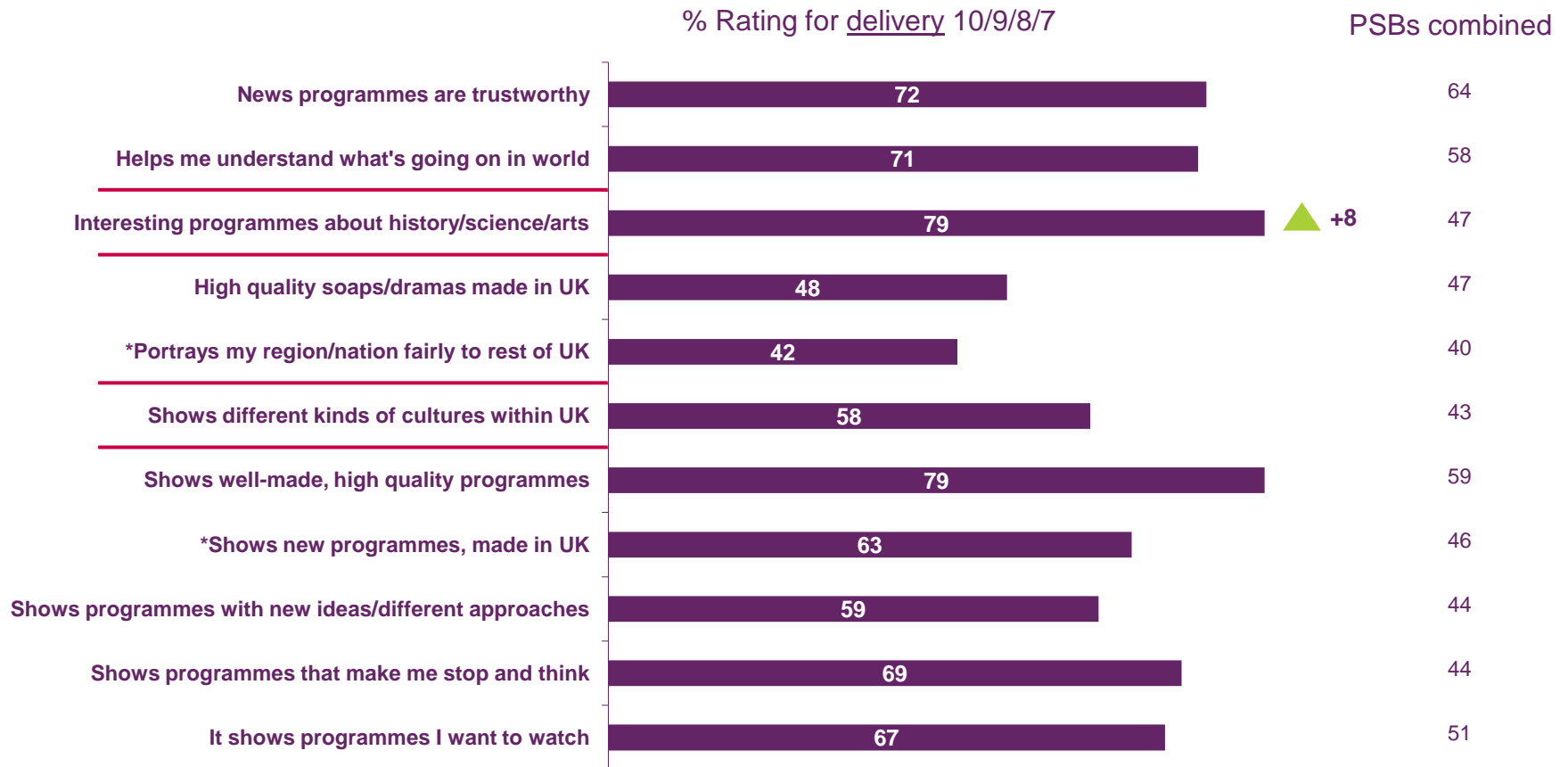


▲ Shows direction of significant differences from 2011 to 2012 at 99% level

Base: Self-reported regular viewers of BBC One (1683)

*Slightly amended wording of statements since 2011. **This statement was only rated by parents of children that watch children's shows on BBC One

Fig 19 BBC Two

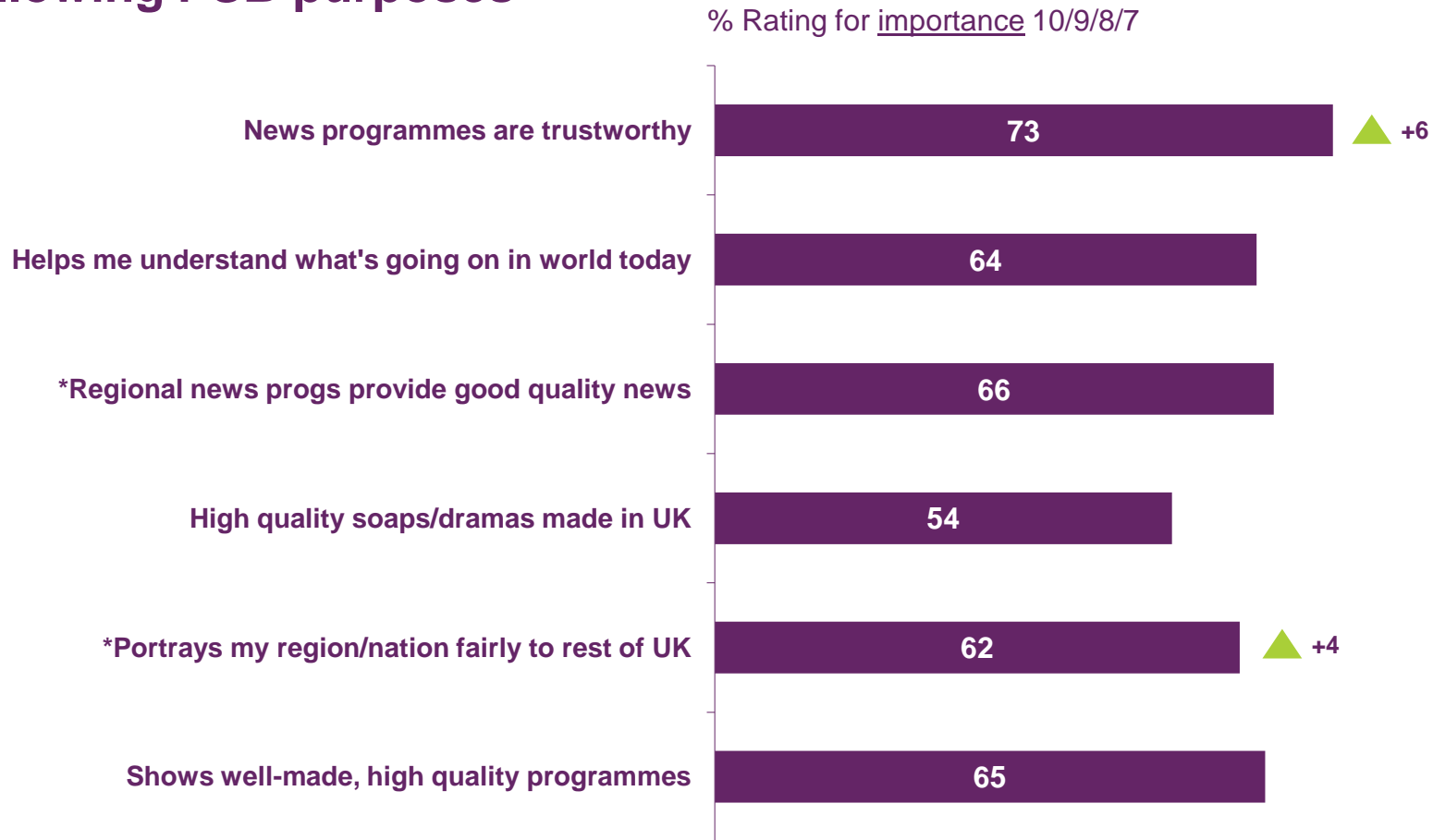


▲ Shows direction of significant differences from 2011 to 2012 at 99% level

Base: Self-reported regular viewers of BBC Two (684)

*Slightly amended wording of statements since 2011

Fig 20 ITV – the importance of ITV providing the following PSB purposes

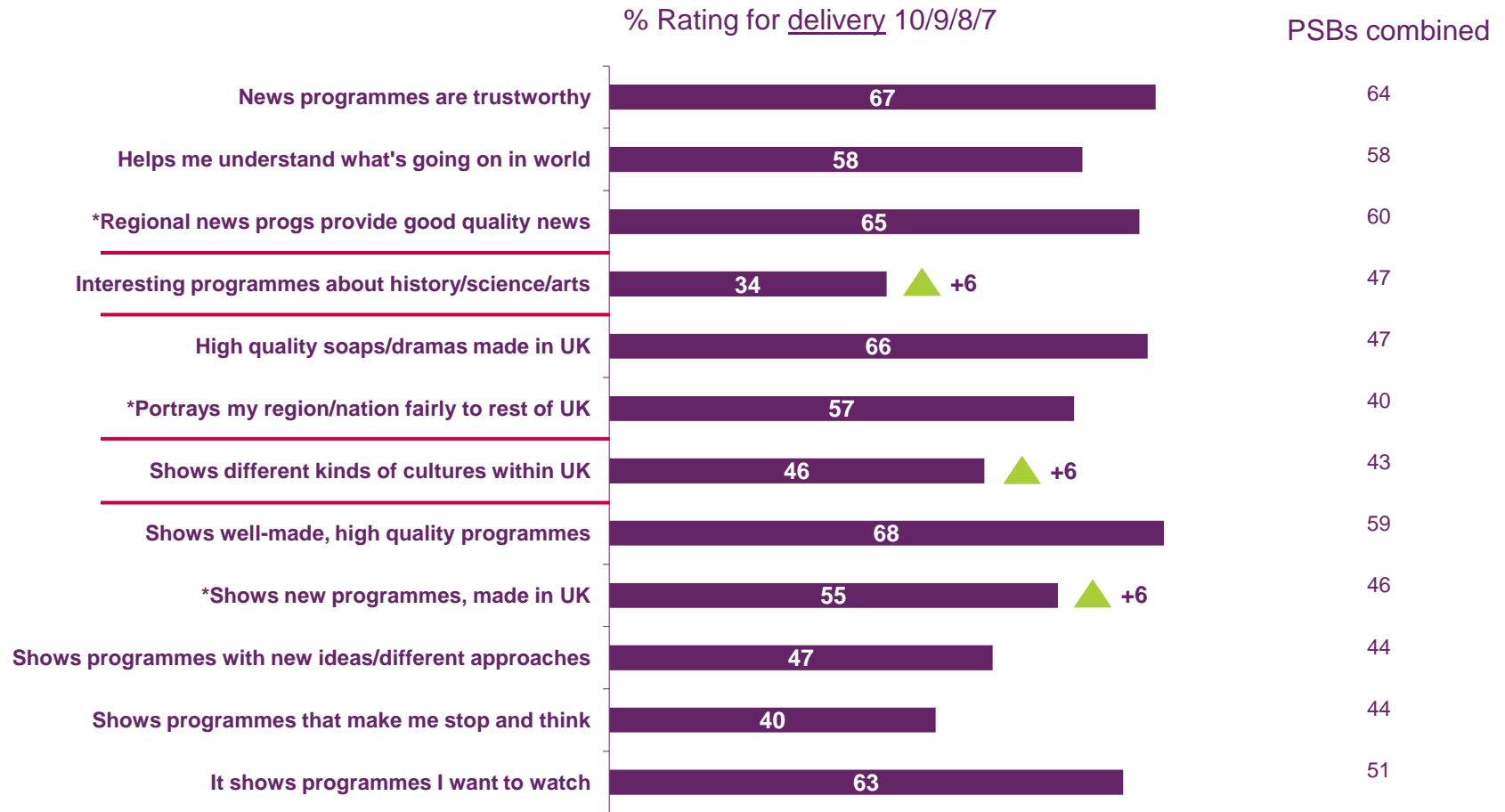


▲ Shows direction of significant differences from 2011 to 2012 at 99% level

Base: All respondents (3025).

*Slightly amended wording of statements since 2011

Fig 21 ITV

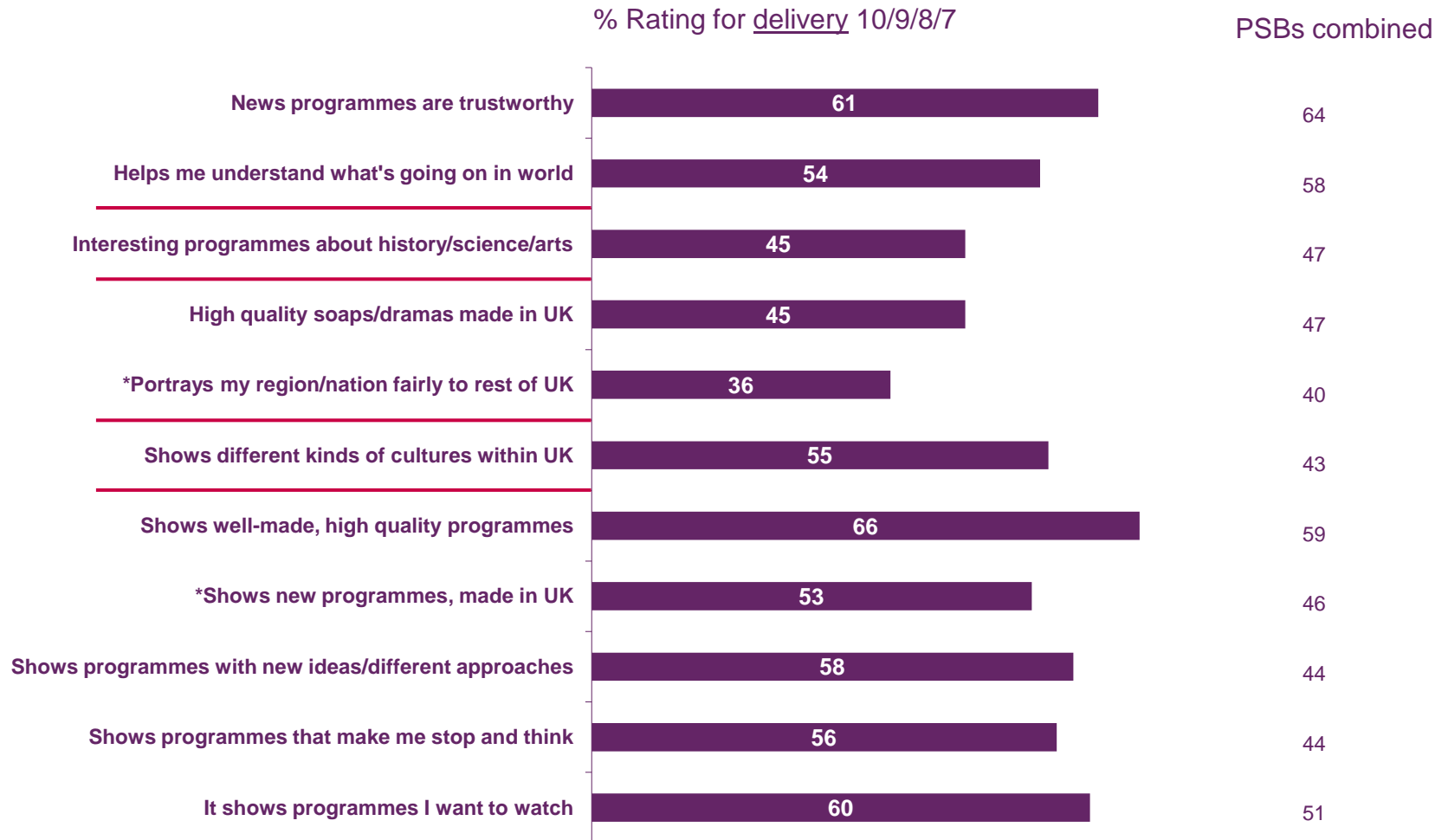


▲ Shows direction of significant differences from 2011 to 2012 at 99% level

Base: Self-reported regular viewers of ITV (1214)
 *Slightly amended wording of statements since 2011



Fig 22 Channel 4



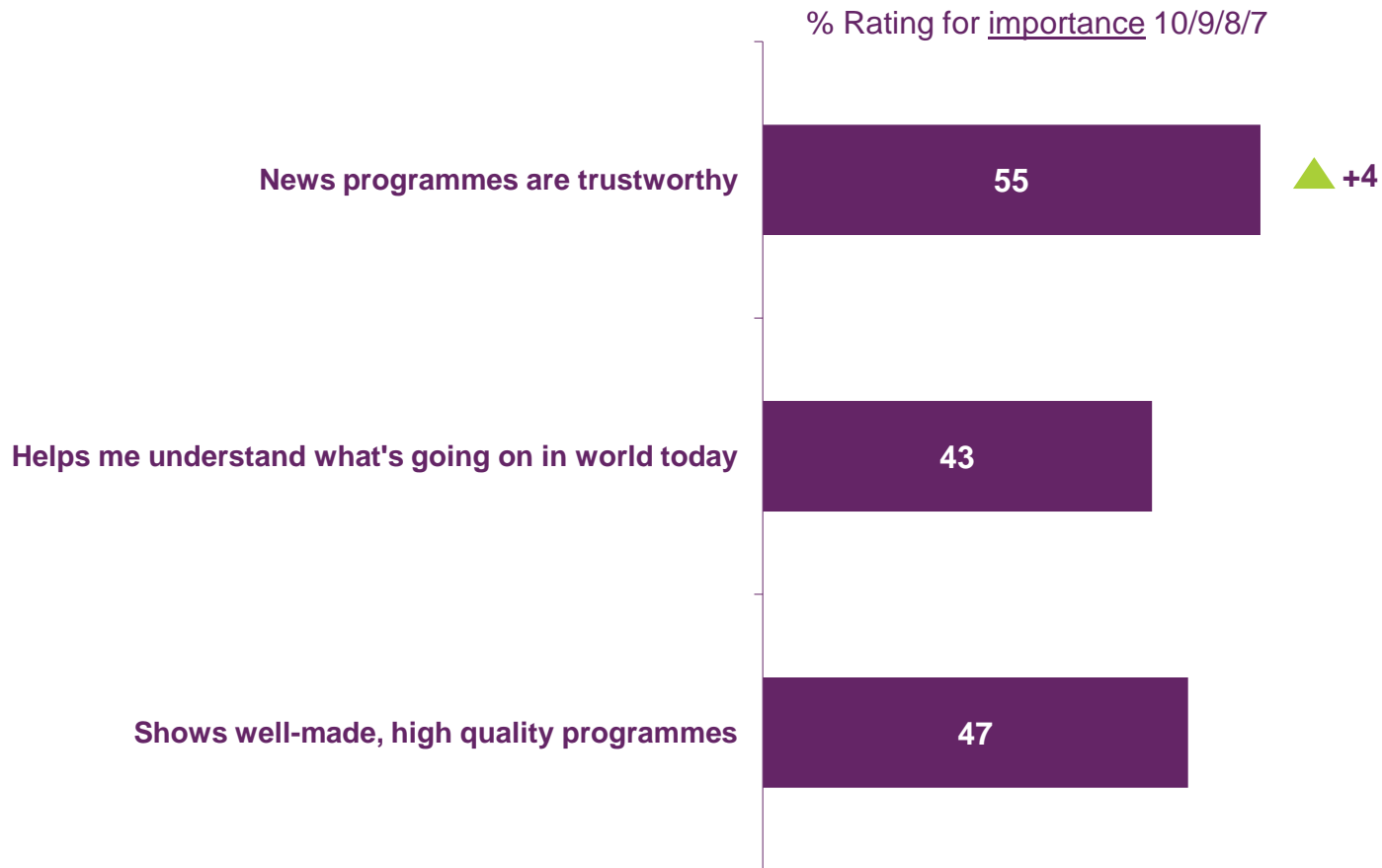
No significant differences from 2011 to 2012 at 99% level

Base: Self-reported regular viewers of Channel 4 (676)

*Slightly amended wording of statements since 2011

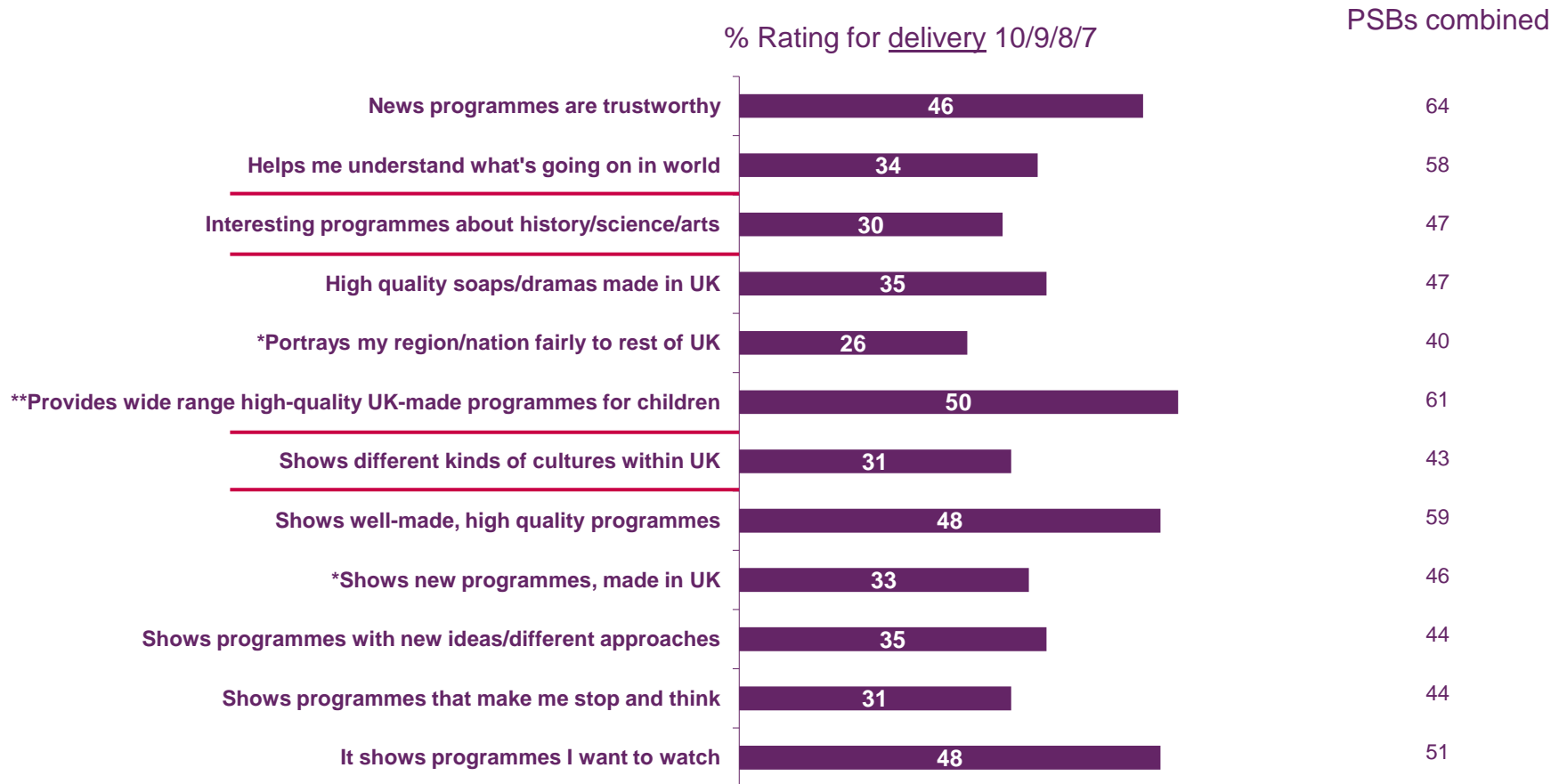


Fig 23 Channel 5 – the importance of Channel 5 providing the following PSB purposes



▲ Shows direction of significant differences from 2011 to 2012 at 99% level

Fig 24 Channel 5



No significant differences from 2011 to 2012 at 99% level

Base: Self-reported regular viewers of Channel Channel 5 (361)

*Slightly amended wording of statements since 2011. **This statement was only rated by parents of children that watch children's shows on Channel 5

Summary: S4C

The Welsh Authority had the statutory responsibility to provide S4C Digidol (digital) services for viewers in Wales.

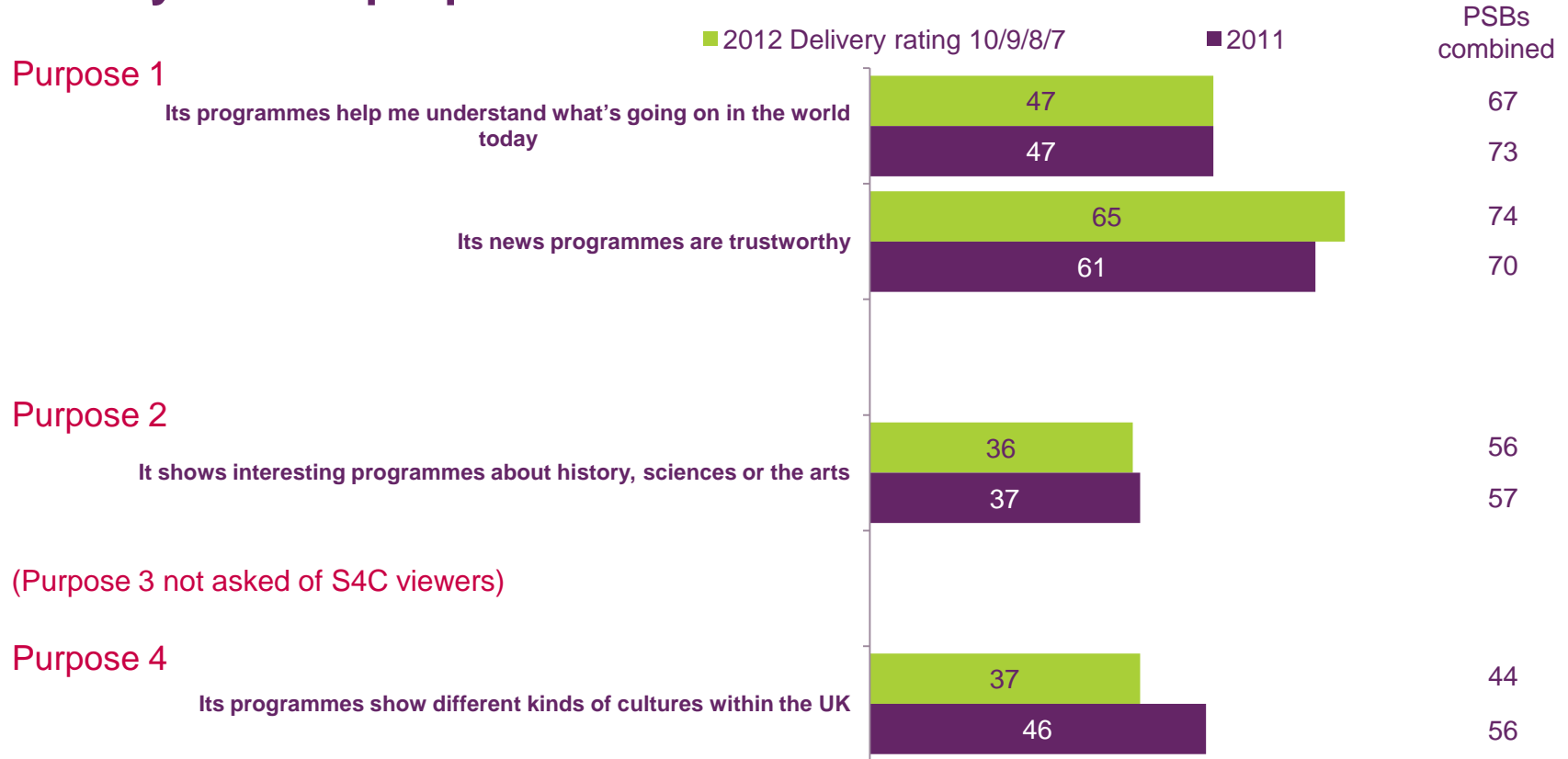
The Communications Act specifies that the S4C services must include News and Current Affairs programming, hence fewer Purposes are asked about.

- In order to provide relevant information about audience views relating to S4C programming in Welsh, the PSB Tracker has been boosted in Wales since January 2006. Opinions are based on *regular viewers of S4C*. The PSB Tracker results reported here are based on the Welsh boost sample.
- The PSB Tracker asks viewers of Welsh language programming on S4C how they rate S4C on achieving the PSB purposes and characteristics, and how they rate the PSB channels together on the same measures. It should be remembered that the PSB channels together are required to deliver the range of purposes and characteristics, rather than any channel alone. However, the remit of S4C and its role in a devolved nation mean that opinions relating to purpose 1 '*informing our understanding of the world*' are particularly relevant.

Key themes

Amongst regular viewers of S4C Welsh language programming in 2012, there were no significant changes year-on-year for any of the Purposes or Characteristics.

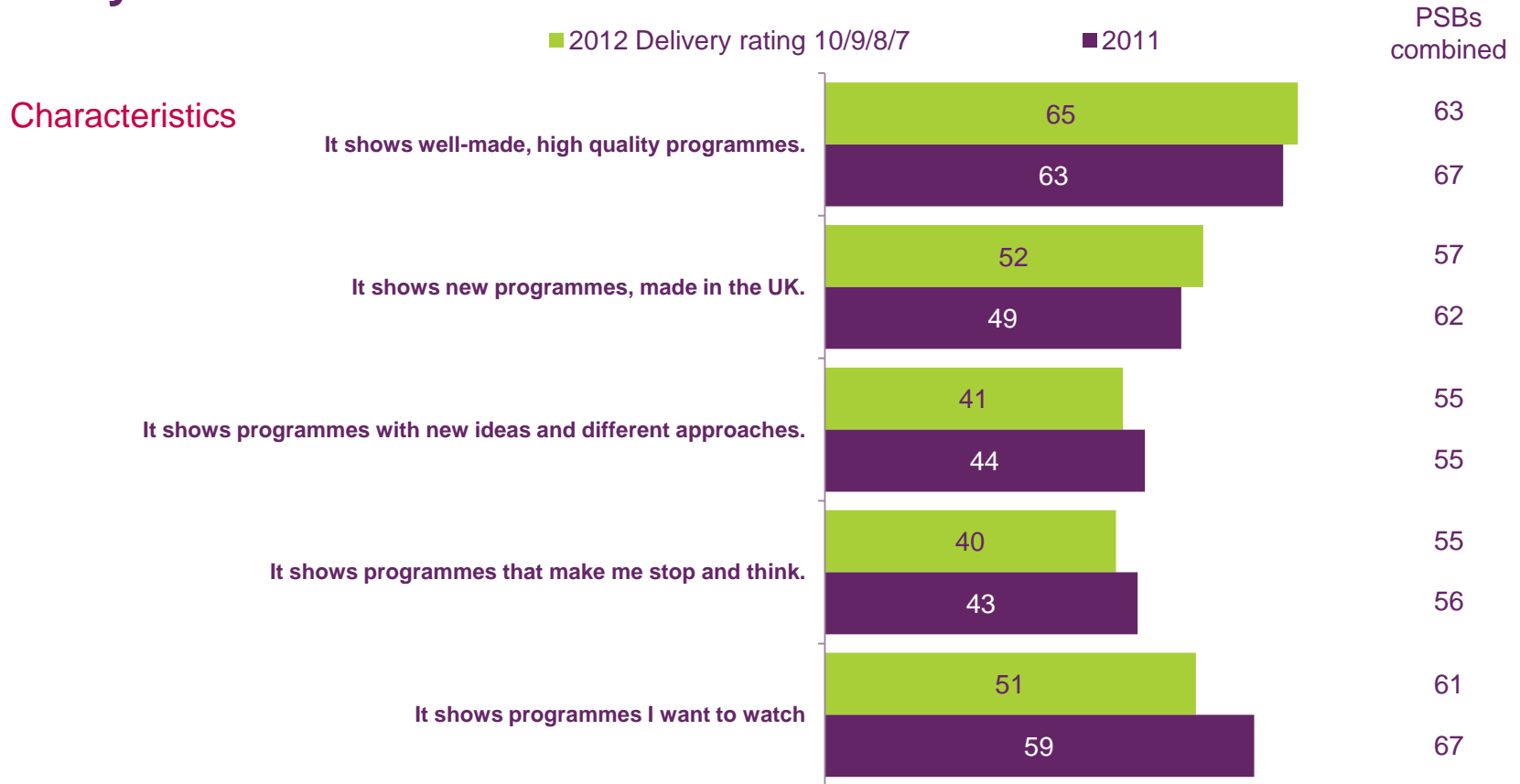
Fig 25 S4C Welsh language viewer opinions of delivery of PSB purposes



No significant differences from 2011 to 2012 at 99% level

Extent to which the characteristic applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all'
 Base: Self-reported regular viewers of S4C (150)

Fig 26 S4C Welsh language viewer opinions of delivery of PSB characteristics



No significant differences from 2011 to 2012 at 99% level

Extent to which the characteristic applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all'
 Base: Self-reported regular viewers of S4C (150)

Overall satisfaction with PSB

Fig 27 Overall satisfaction with PSB over time

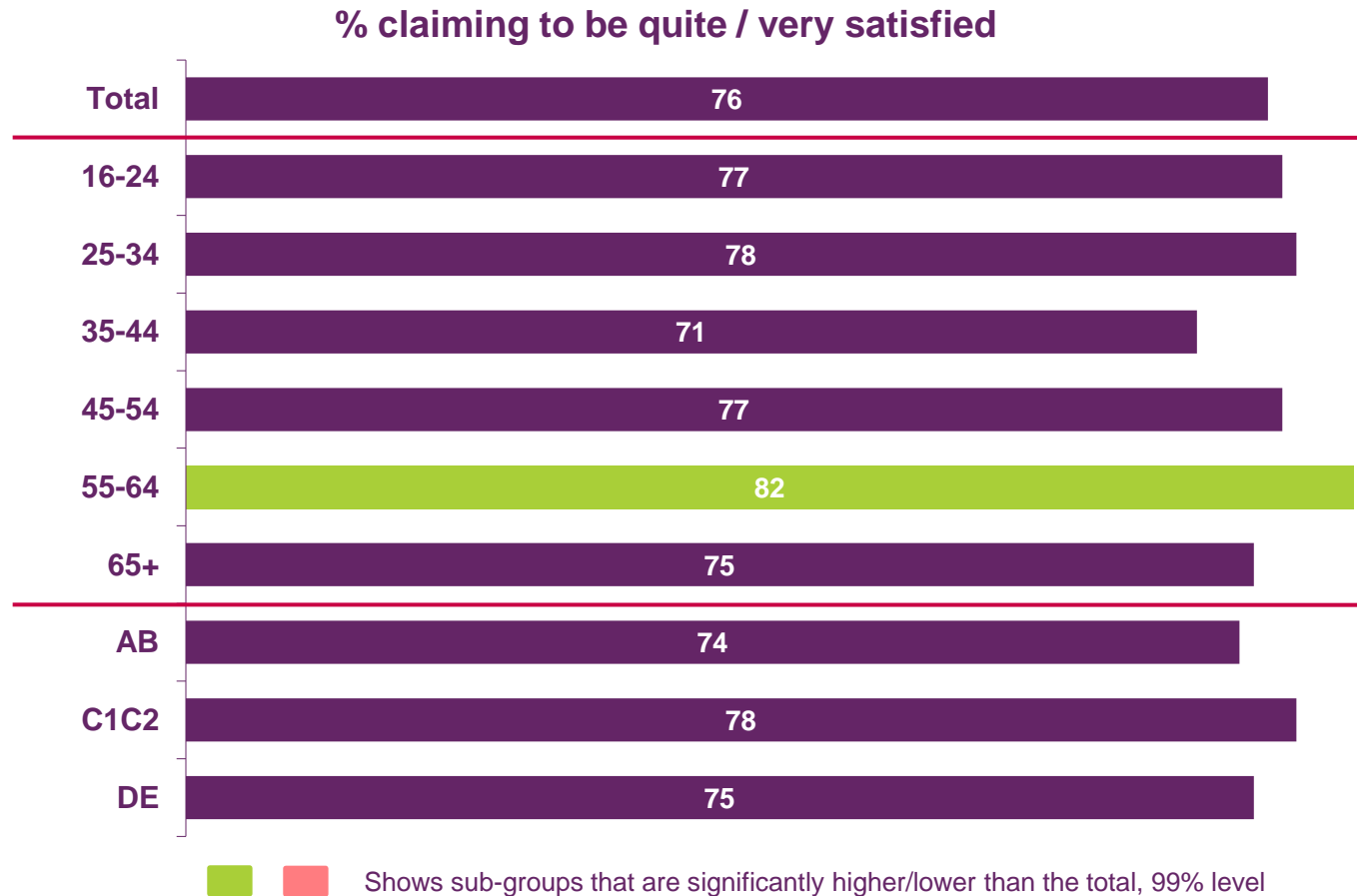


No significant differences from 2011 to 2012 at 99% level

Q. And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV, S4C (WALES ONLY) and Channels 4 and Channel 5 - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All respondents who ever watch any PSB channel (2007 = 7105, 2010 = 6909, 2011 = 3079, 2012 = 2983)

Fig 28 Overall satisfaction with PSB by age and socio-economic group

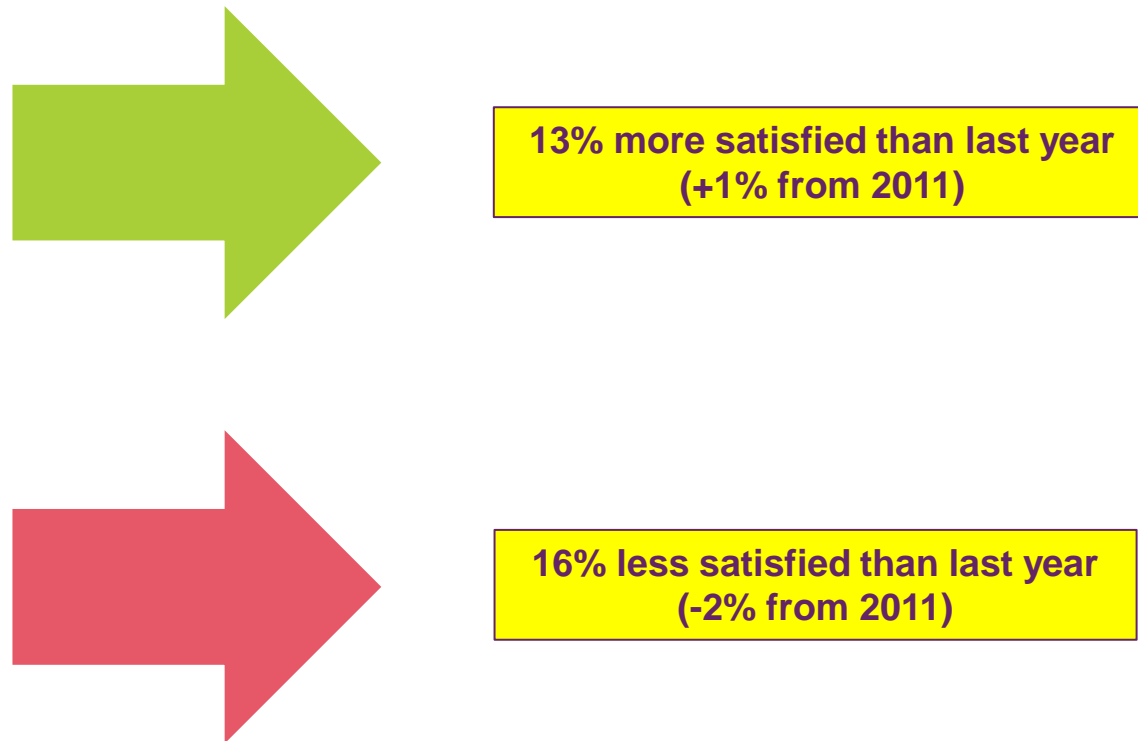


Q. And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV, S4C (WALES ONLY) and Channels 4 and Channel 5 - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All who ever watch any PSB channels (2983)

16-24 (447); 25-34 (478); 35-44 (570); 45-54 (483); 55-64 (411); 65+ (594); AB (690); C1C2 (1465); DE (828)

Fig 29 Overall satisfaction with PSB compared to one year ago



Q. Thinking again about these channels combined, the BBC channels, ITV, S4C (WALES ONLY) and Channels 4 and Channel 5 do you think you are more satisfied, less satisfied or have the same satisfaction with these as a year ago?

Base: All who ever watch any PSB channels (2983)

Fig 30 Reasons for declining overall satisfaction with PSB compared to one year ago

	All	Change vs. 2011
Too many repeats	43%	+16 ▲
Poor quality of programmes	20%	+7
They are boring / I do not find them interesting	19%	+4
Not enough new programmes	10%	+6 ▲
Too many reality programmes	9%	+2
Don't portray true life/hard to tell if truthful	7%	+7 ▲
Not enough dramas/ films	6%	-1
Do not watch TV	5%	+3
Because I need to pay TV licence / not worth it	4%	=
Not enough informative/ educational programmes	4%	=
There are too many soaps	4%	=

All other responses below 3%

▲ Shows significant differences from 2011 to 2012 at 99% level

Q. What makes you say this?

Base: All less satisfied compared with last year (465)

Fig 31 Reasons for increasing overall satisfaction with PSB compared to one year ago

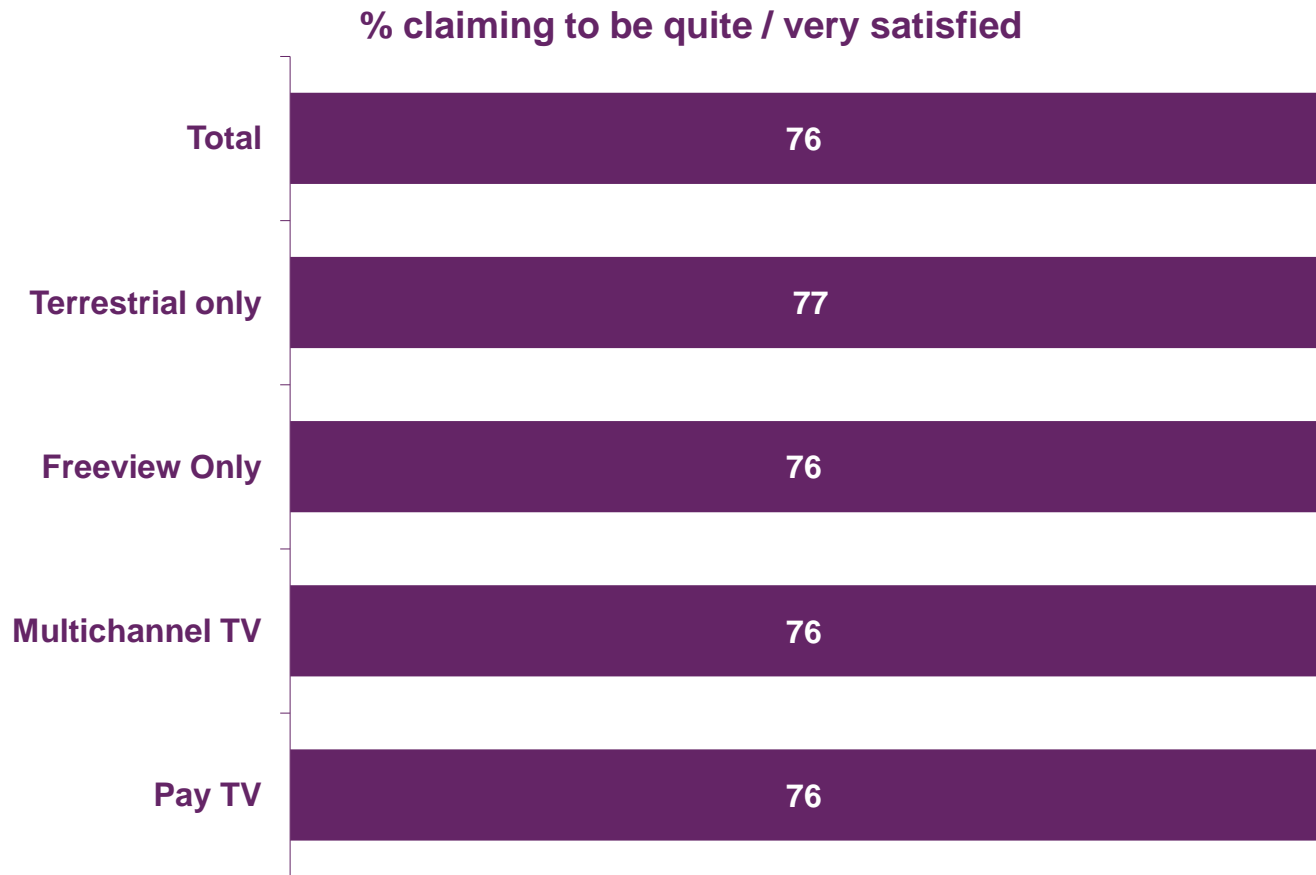
	All	Change vs. 2011
Better choice of programmes	46%	+25 ▲
More channels are becoming appealing	21%	+17 ▲
Better quality of programmes	19%	+9 ▲
Better drama/films	10%	+5
Programmes are more informative/relevant	7%	+1
Because I have Freeview/Sky etc.	7%	+5 ▲
More international/national coverage	6%	+2
More interesting documentaries	6%	+4
More channels	3%	-1
More cultural programmes	3%	+2
All other responses below 2%		

▲ Shows significant differences from 2011 to 2012 at 99% level

Q. What makes you say this?

Base: All more satisfied compared with last year (367)

Fig 32 Overall satisfaction with PSB by viewing platform

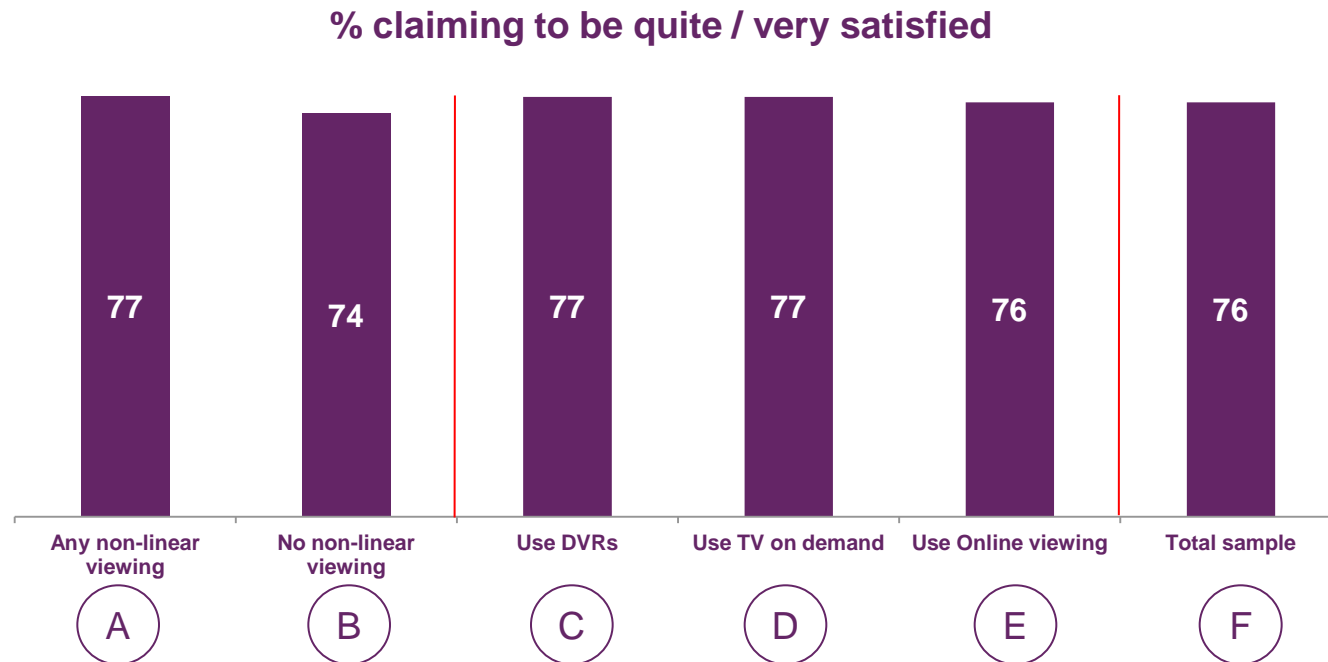


No significant differences (net satisfied) between any platform (99% level)

Q. And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV, S4C (WALES ONLY) and Channels 4 and Channel 5 - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All respondents who ever watch any PSB channels (2983, 240, 670, 2743, 1929), Terrestrial only (240); Freeview Only (670); Multichannel TV (2743); Pay TV (1929)

Fig 33 Overall satisfaction with PSB by linear viewing and DVR usage



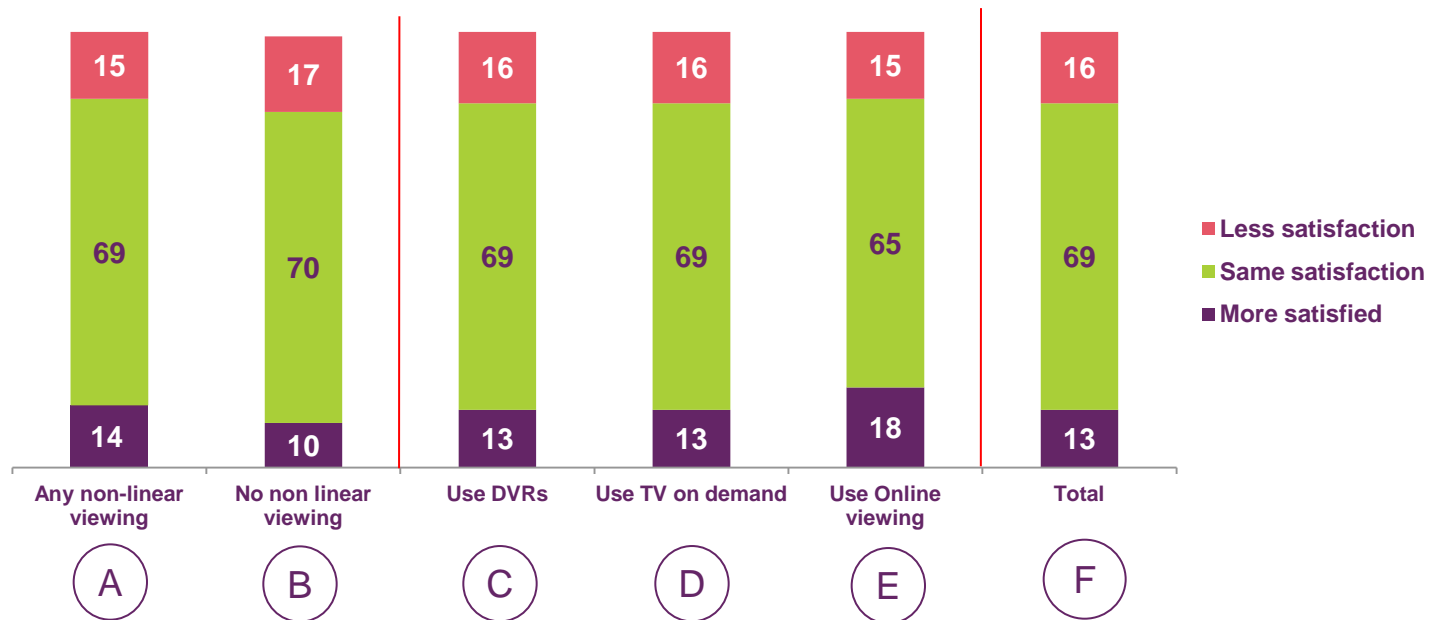
No significant differences between categories (99% level – A/B/C/D/E/F)

Q. And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV, S4C (WALES ONLY) and Channels 4 and Channel 5 - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All who ever watch any PSB channels: Any linear viewing (2094), No non-linear viewing (889), Use DVRs (1468), Use TV on demand (529), Use Online viewing (869), Total (2983)

Fig 34 Overall satisfaction with PSB compared to one year ago by linear viewing and non linear viewing

% claiming the same/increased satisfaction compared to one year ago



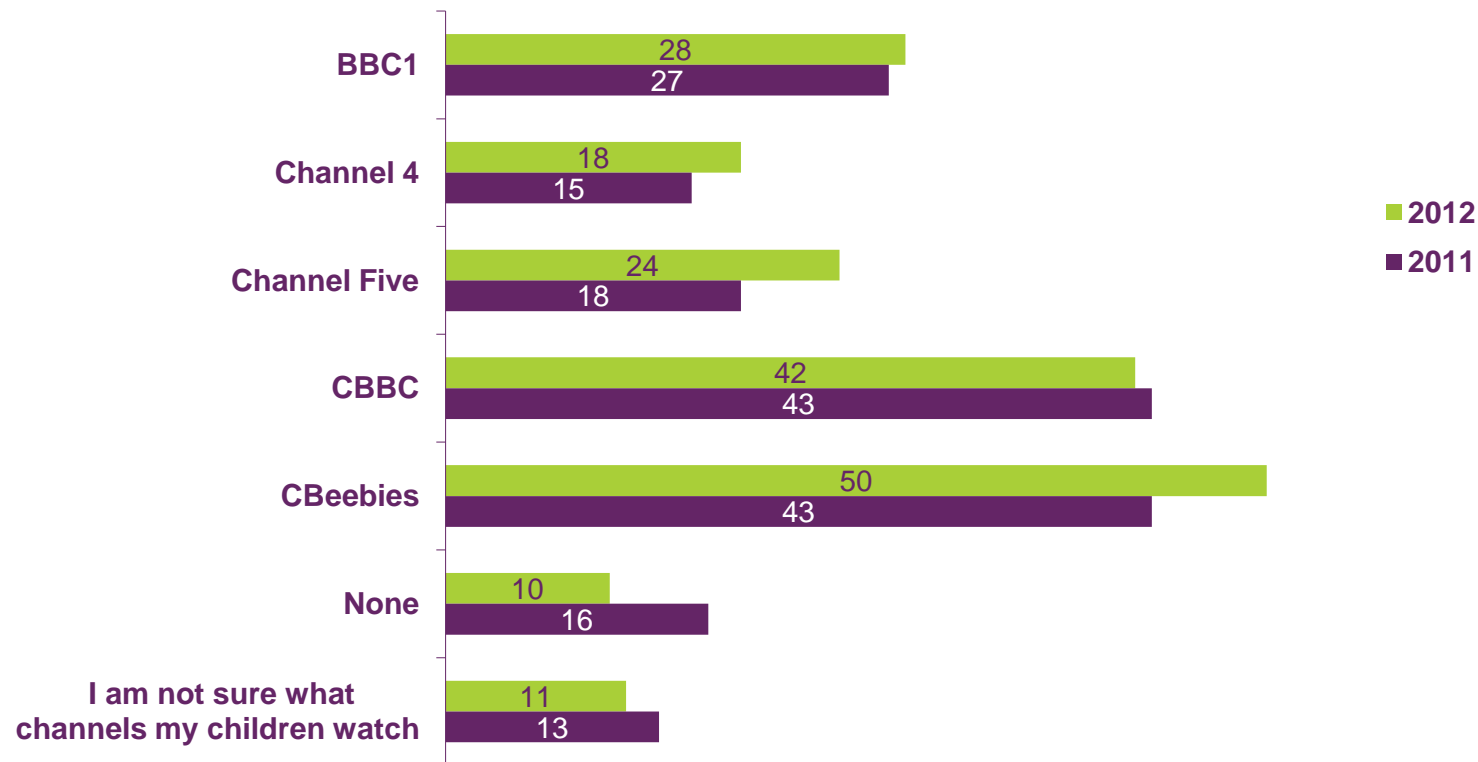
No significant differences between categories (99% level – A/B/C/D/E/F)

Q. Thinking again about these channels combined do you think you are more satisfied, less satisfied or have the same satisfaction with these as a year ago?

Base: All who ever watch any PSB channels: Any linear viewing (2094), No non-linear viewing (889), Use DVRs (1468), Use TV on demand (529), Use Online viewing (869), Total (2983)

Children's PSB

Fig 35 Proportion of UK sample's children that are regular viewers of children's PSB channel



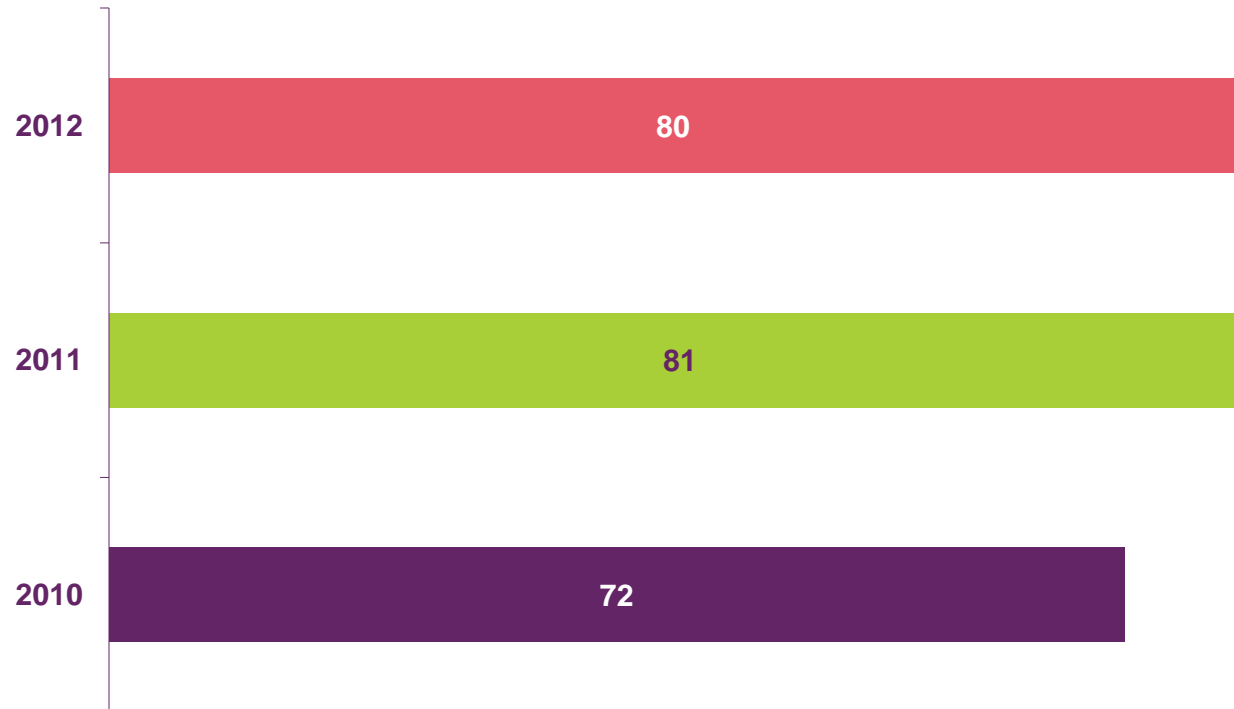
No significant differences from 2011 to 2012 at 99% level

Q On which of these channels does/do your child/children regularly watch programmes aimed specifically at children?

Base: All responsible for children under 16 (529, 636)

Fig 36 Parents' opinions on the importance of Children's PSB

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



No significant differences from 2011 to 2012 at 99% level

NB in 2010 the question was asked as part of the main Importance and Delivery section along with the other statements.

In 2011 it was asked in a separate children section, after the questions on overall satisfaction had been asked.

In 2010 channels asked about were BBC One, BBC Two, ITV, Channel 4, Channel 5, Cbeebies and CBBC.

In 2011 BBC Two, ITV and Channel 4 were not included.

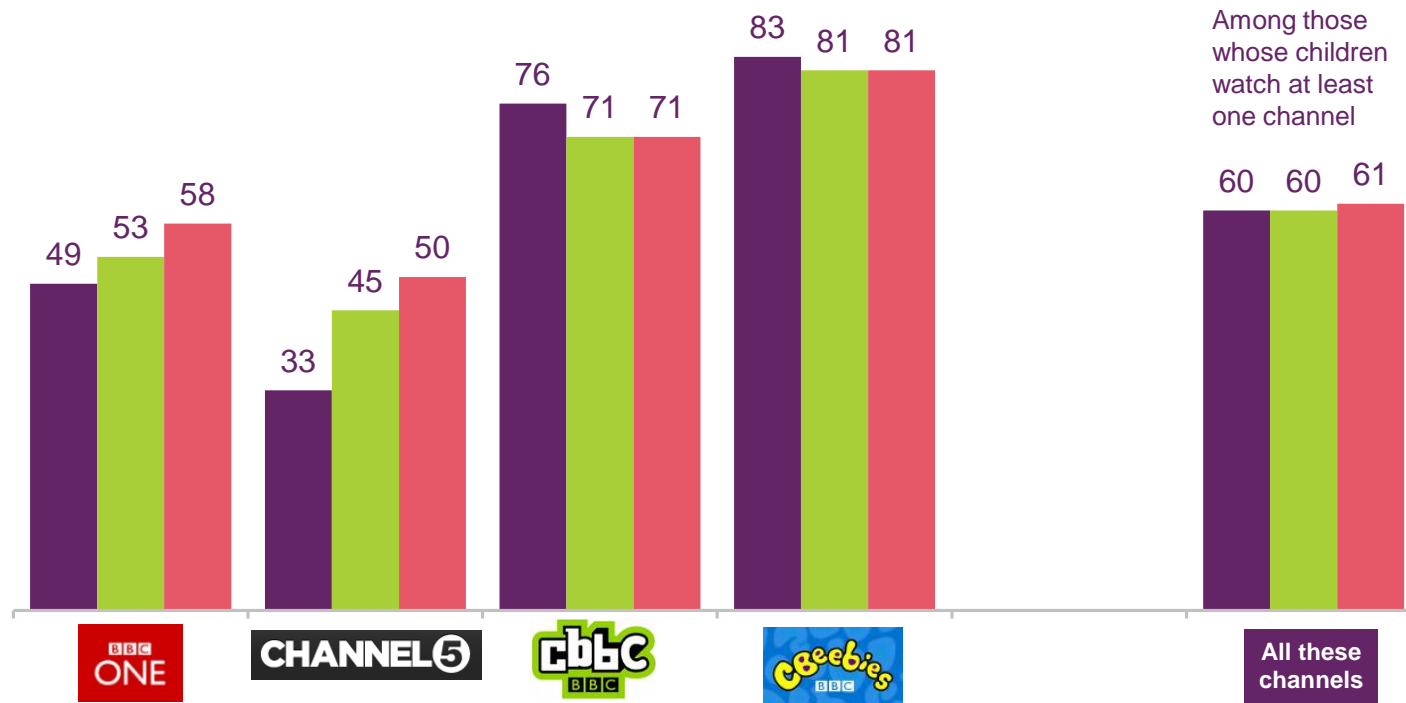
Extent to which the characteristics is important, where 10 means 'extremely important' and 1 means "not at all important" (% rating 10/9/8/7)

Base: 2010 – All in Sample A (3569); 2011 / 2012 – All whose children regularly watch any of those channels BBC One, Channel 5, CBeebies, CBBC, S4C regularly (363, 487)

Fig 37 Parents' opinions on the delivery of Children's PSB

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

■ 2010 ■ 2011 ■ 2012



Note: Asked of more channels prior to 2011

No significant differences from 2011 to 2012 at 99% level

Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and one is the lowest. (% rating 10/9/8/7)

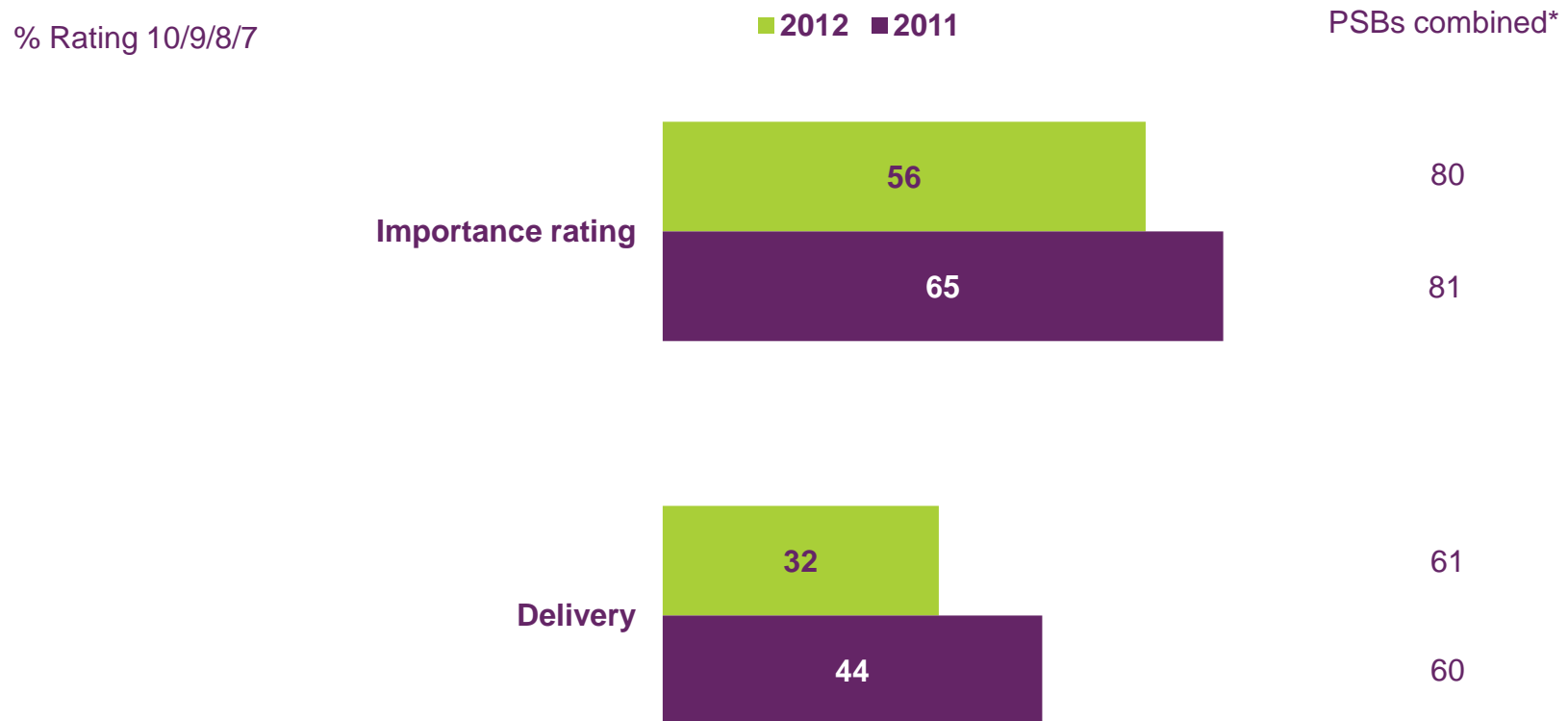
Base for 'all children's' PSB channels: All respondents whose children regularly watch at least one channel (1448,363,487)

Base for individual channels: Those whose children are regular viewers of each channel featured (CBBC = 805,180,271 CBeebies = 782,218,320 BBC One = 906,155,185 Channel Channel 5 = 574,89,140)



Fig 38 Parent's opinion on Channel 4 – indicative only

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

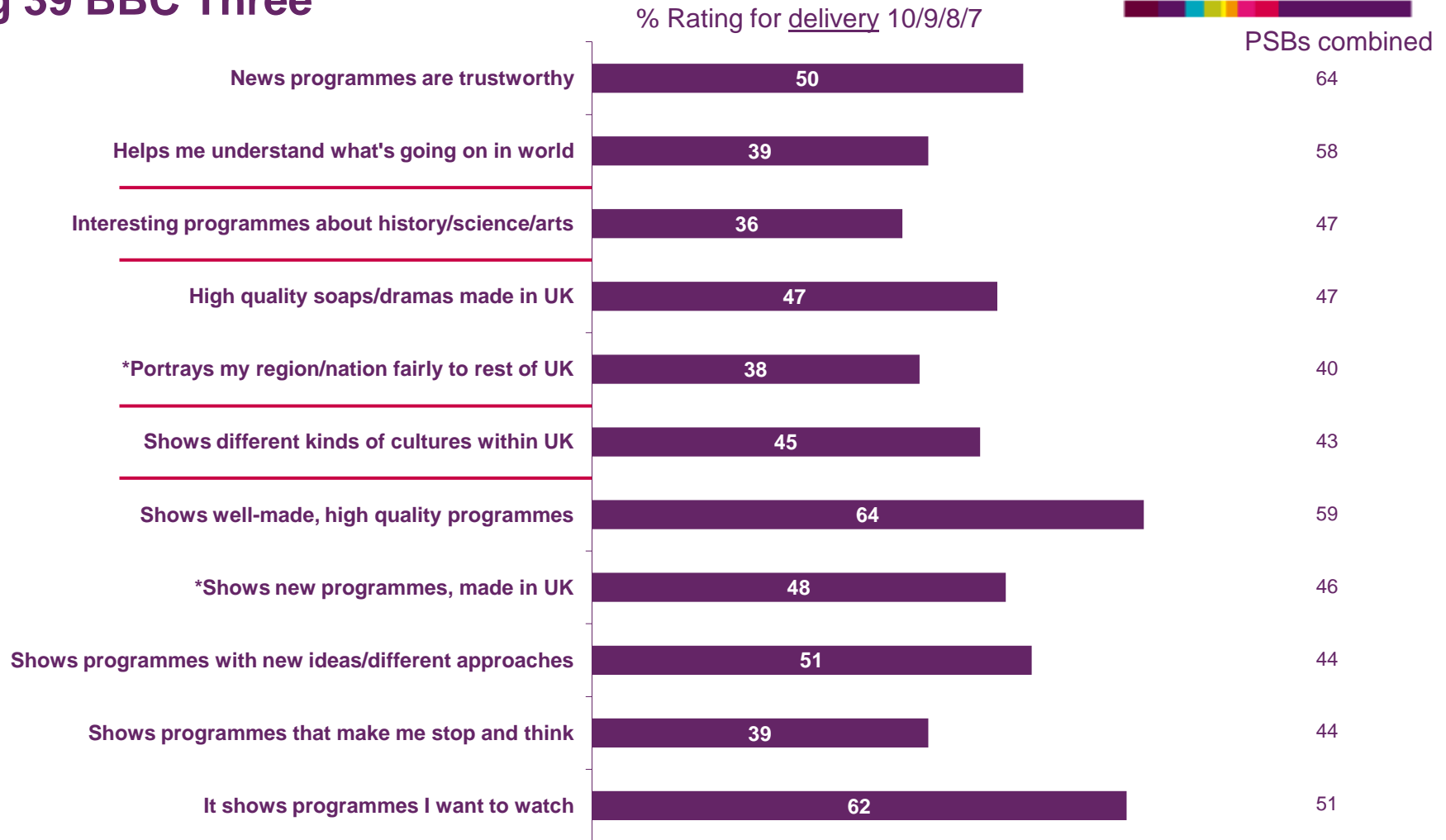


*NB Asked of all children's PSB channels combined for the similar statement, 'It provides a wide range of high quality and UK-made programmes for children'
No significant differences from 2011 to 2012 at 99% level

Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and one is the lowest (% rating 10/9/8/7)
Base: All those with a child aged 12-15 that watches C4 (68,55) – CAUTION SMALL BASE SIZE

Digital channels

Fig 39 BBC Three



No significant differences from 2011 to 2012 at 99% level

Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and one is the lowest (% rating 10/9/8/7).

Base: Self-reported regular viewers of BBC Three (277)

*Slightly amended wording of statements since 2011

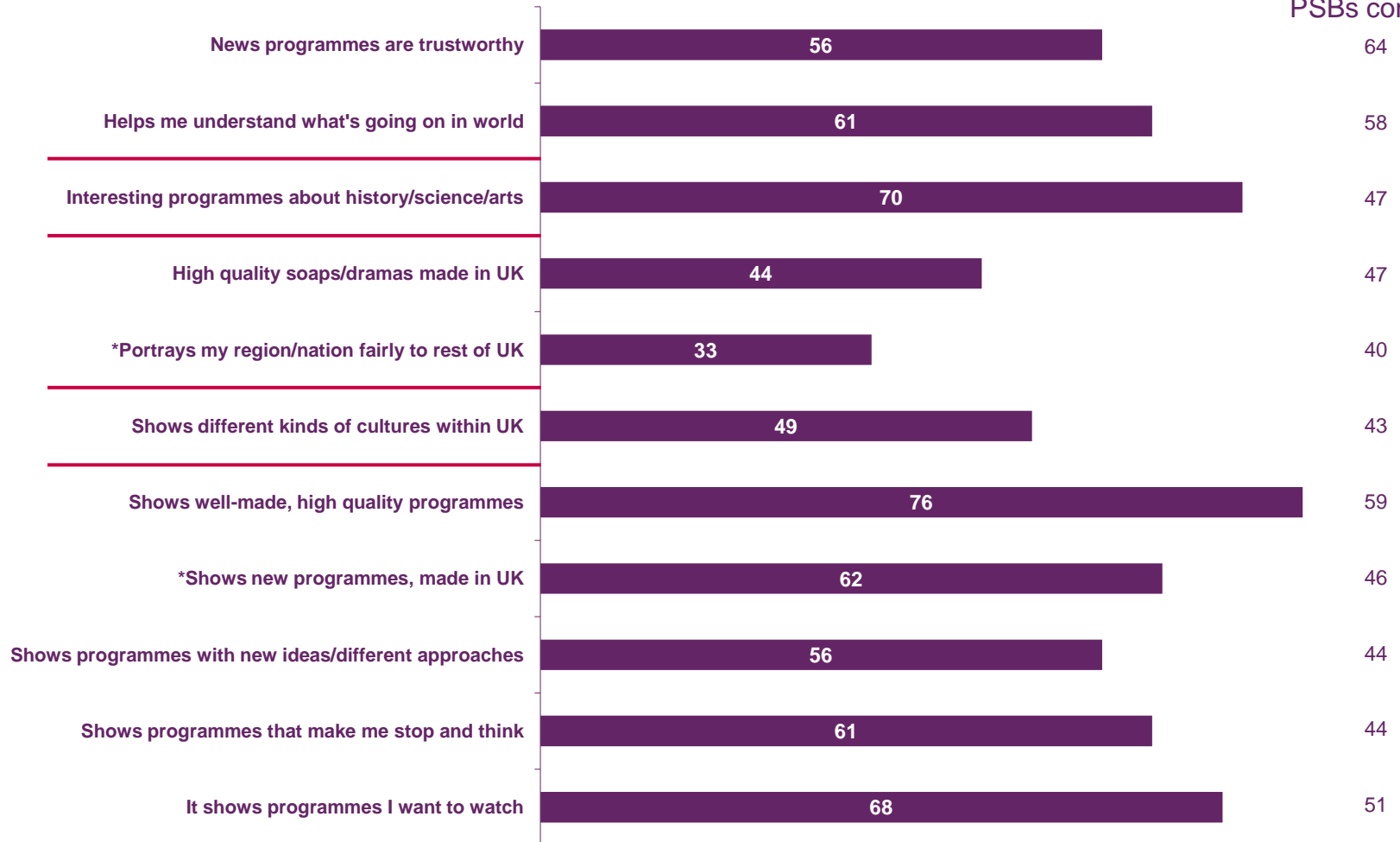
Fig 40 BBC Four

Ofcom



PSBs combined

% Rating for delivery 10/9/8/7



No significant differences from 2011 to 2012 at 99% level

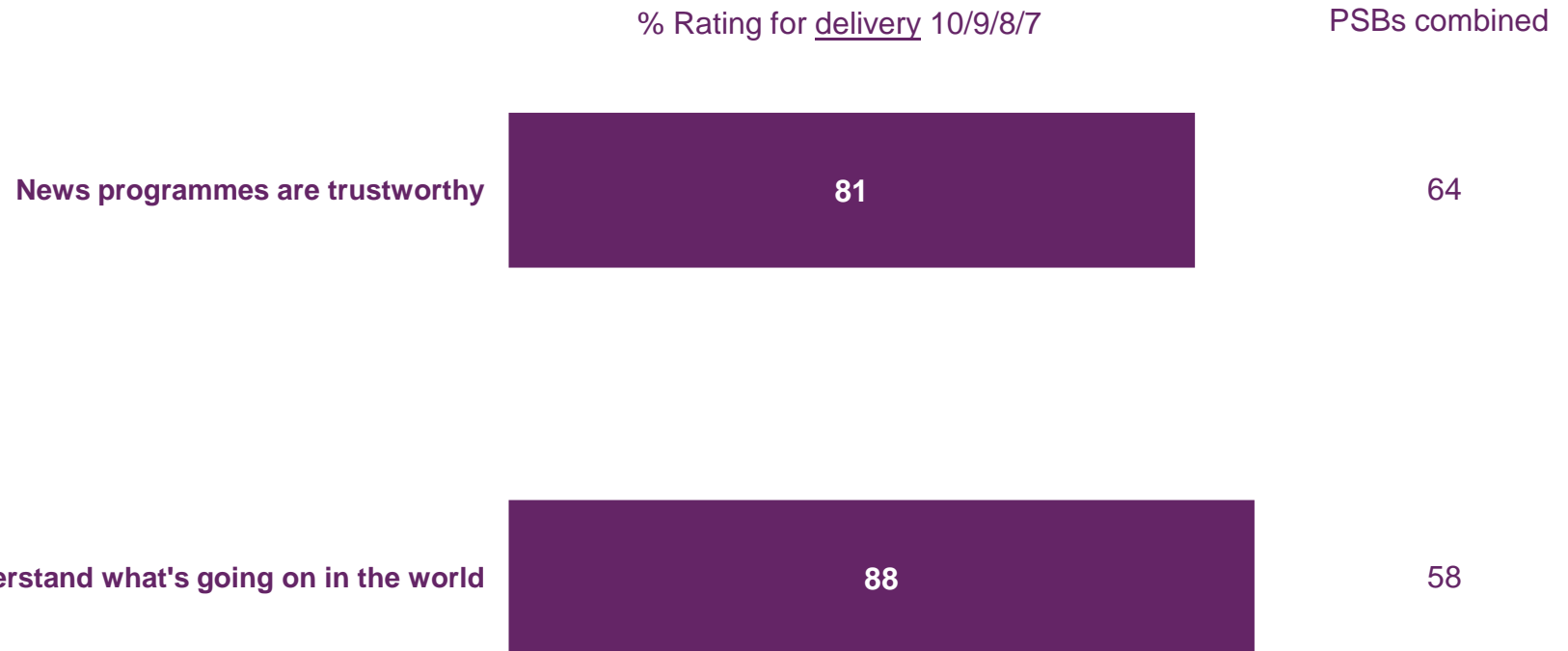
Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and one is the lowest (% rating 10/9/8/7).

Base: Self-reported regular viewers of BBC Four (169)

*Slightly amended wording of statements since 2011



Fig 41 BBC News

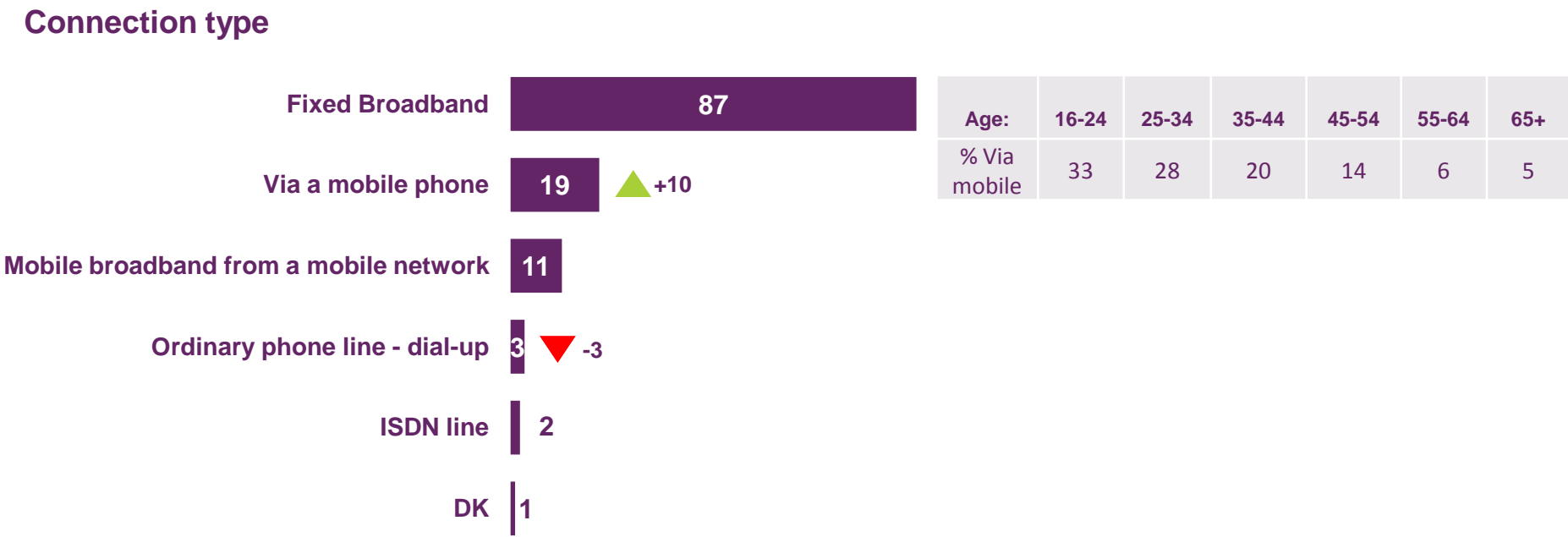


No significant differences from 2011 to 2012 at 99% level

PSB website access and online viewing



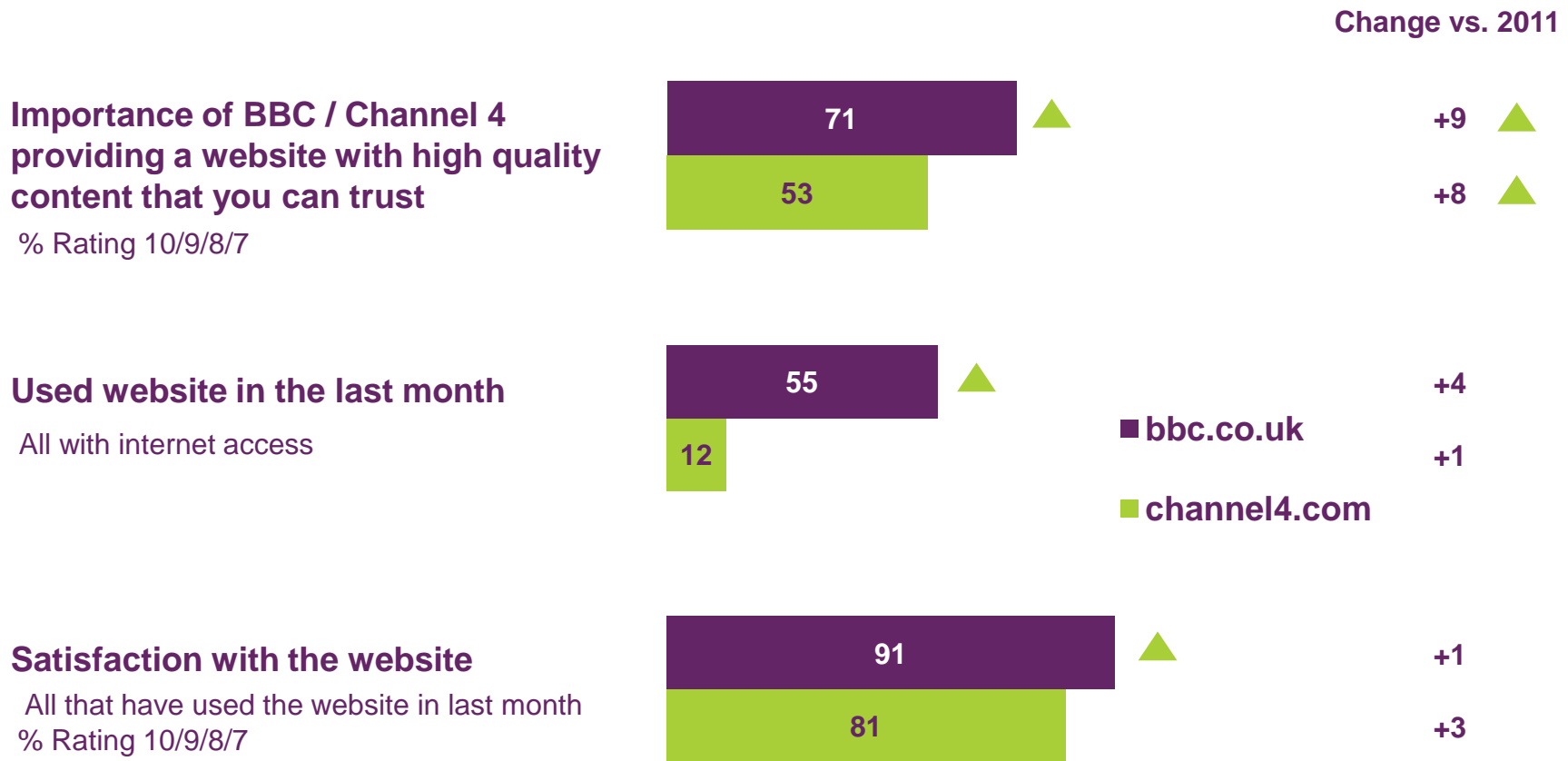
Fig 42 Internet access and connection type at home



▲ Shows direction of significant differences from 2011 to 2012 at 99% level

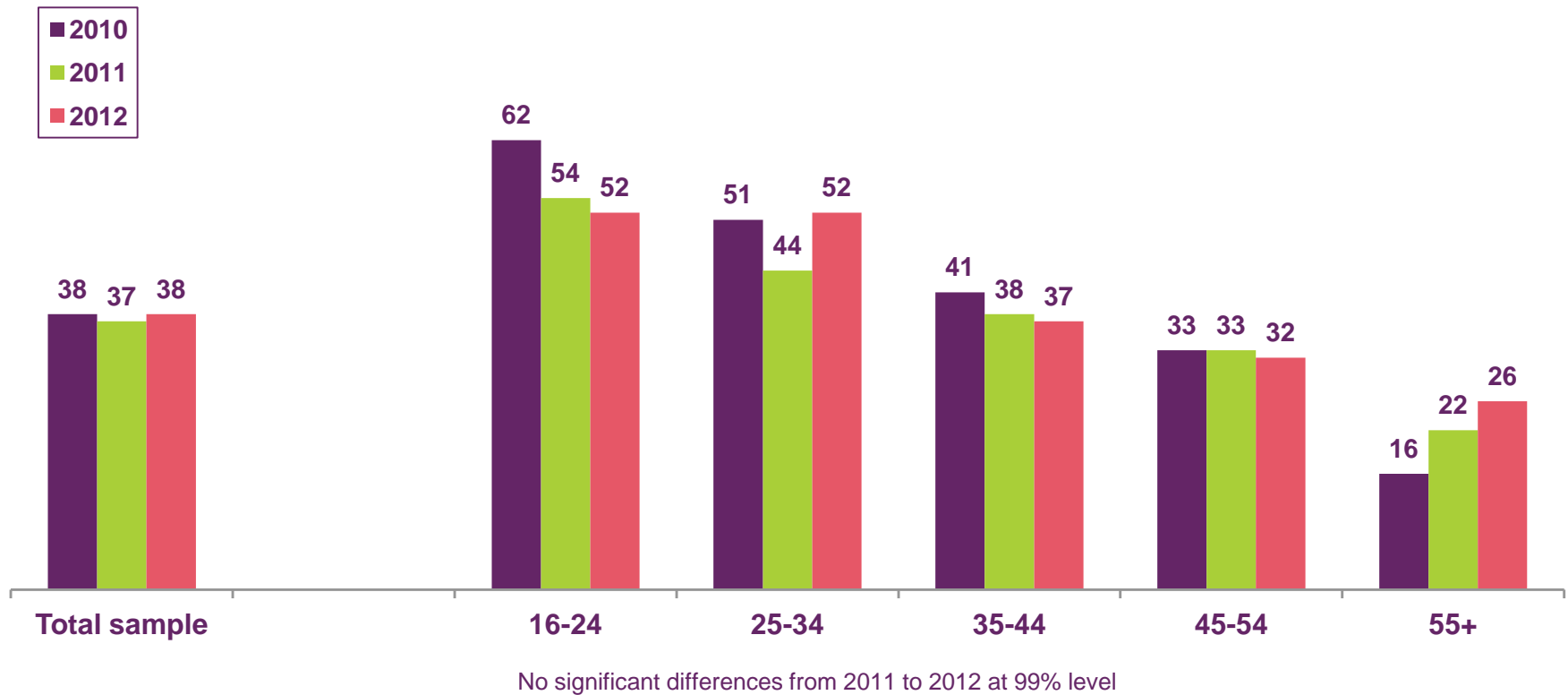
Internet usage
Base: All respondents (3025), All with internet access at home (2356)

Fig 43 Attitudes towards BBC and Channel 4 online platforms



▲ Shows significant differences between BBC and C4 websites and 2011 and 2012, 99% level

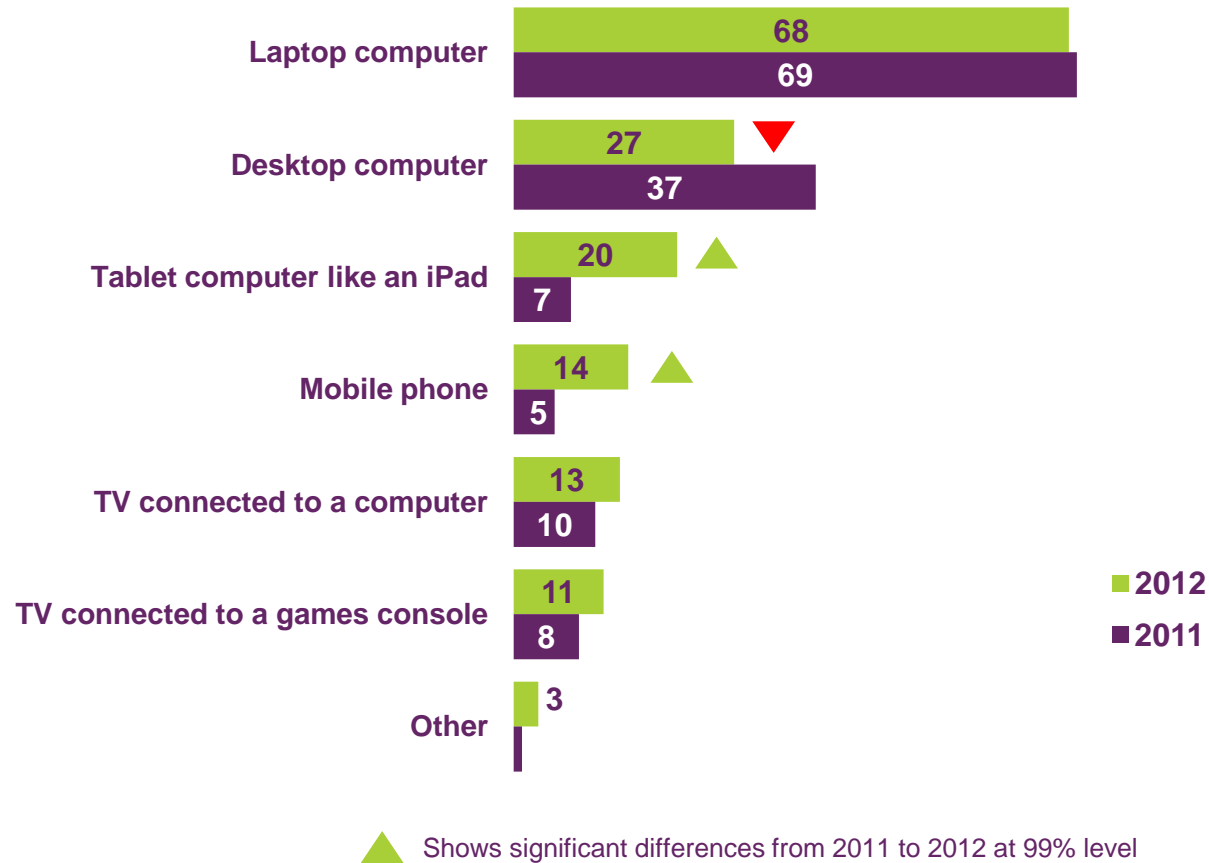
Fig 44 Online viewing



Q Do you ever use the internet to watch or download programmes or films?

Base: All with internet access (6964,2295,2356), 16-24 (685,392,400), 25-34 (1257,647,426), 35-44 (1174,501,495), 45-54 (1312,410,433), 55+ (2525,582,602)

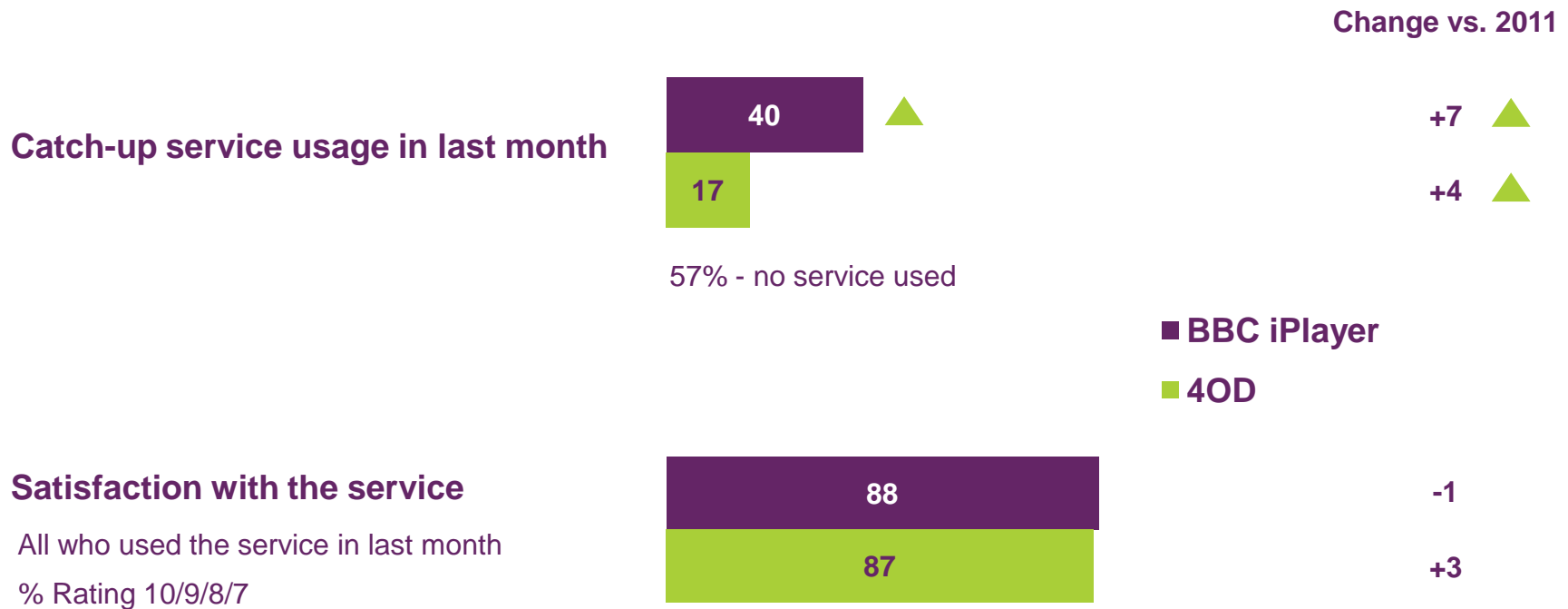
Fig 45 Type of platform used for online viewing



Q Which of the following do you watch them on?

Base: All that use internet to watch or download programmes or films (810, 885)

Fig 46 Catch-up services



▲ Shows significant differences between BBC and C4 websites and between 2011 and 2012, 99% level

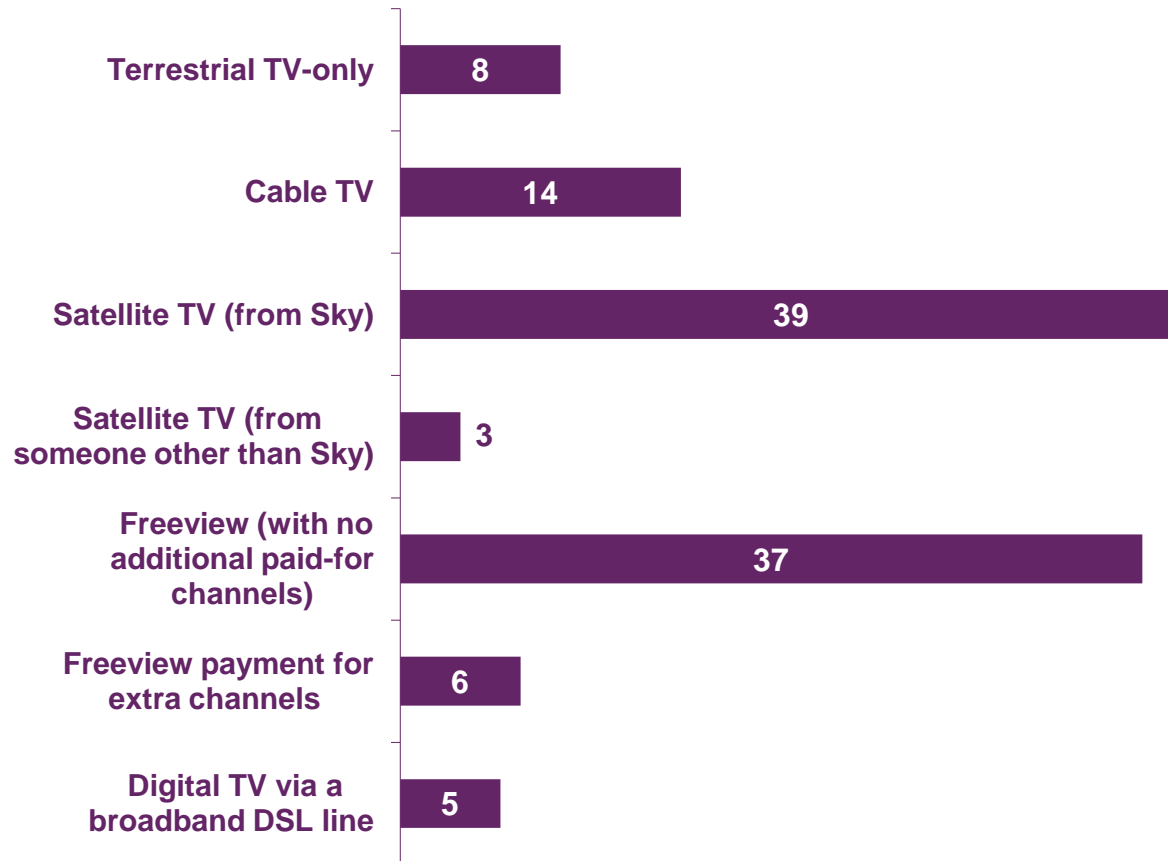
Q Which of the following catch-up services have you used in the last month? Base: All respondents (3025)

Q And how would you rate your overall satisfaction with <online player>?

Base: All that have used this service in the last month (BBC iPlayer 1224, 4OD 534, S4C Click – base too small to chart – 17)

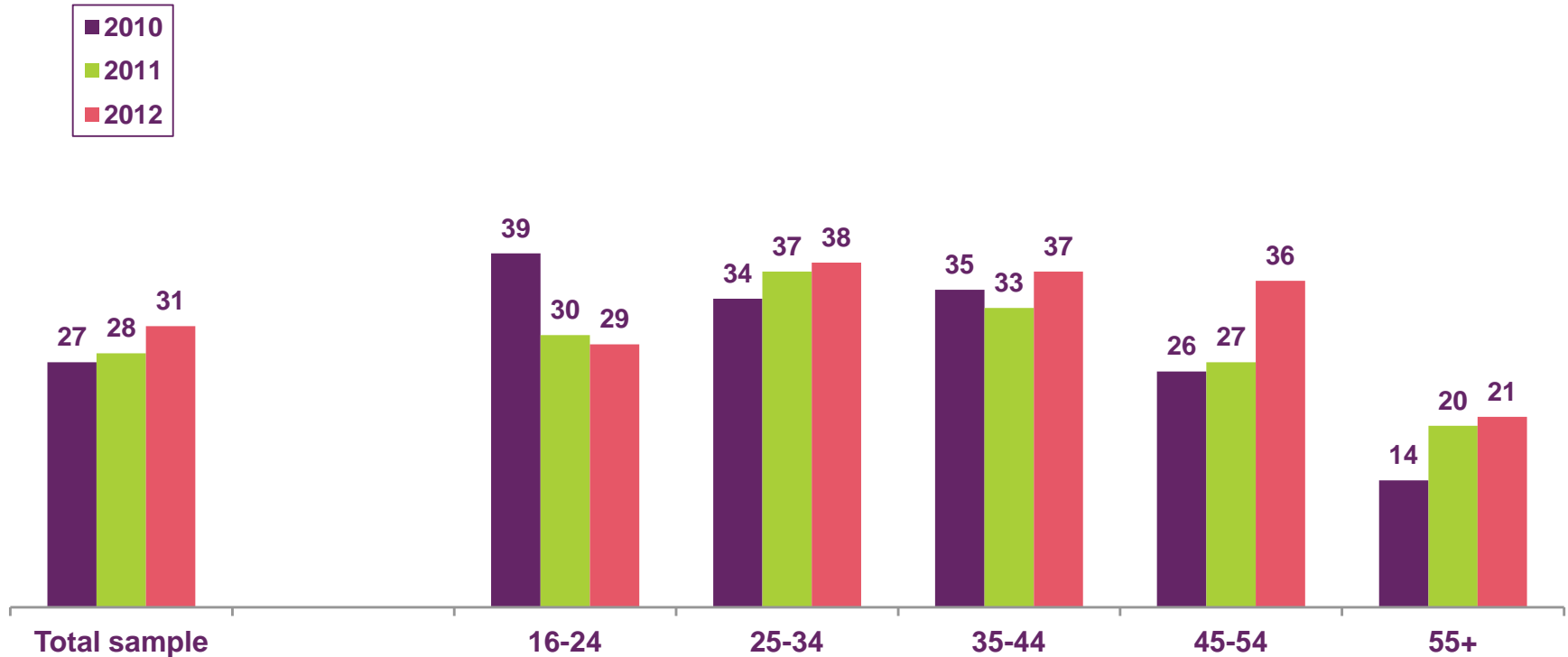
Appendices

TV reception type



Q. Which, if any, of these types of television does your household receive at the moment?
 Base: All respondents (3025)

Use of 'on demand' services



No significant differences from 2011 to 2012 at 99% level

Q. Do you watch any programmes 'on demand' through your TV service? By this I mean pay-per-view programmes or using the TV catch-up services that allow you to watch some of the programmes shown in the last week. I do not mean watching programmes that you have personally recorded onto your hard-drive e.g. though Sky+ or a PVR/DVR.

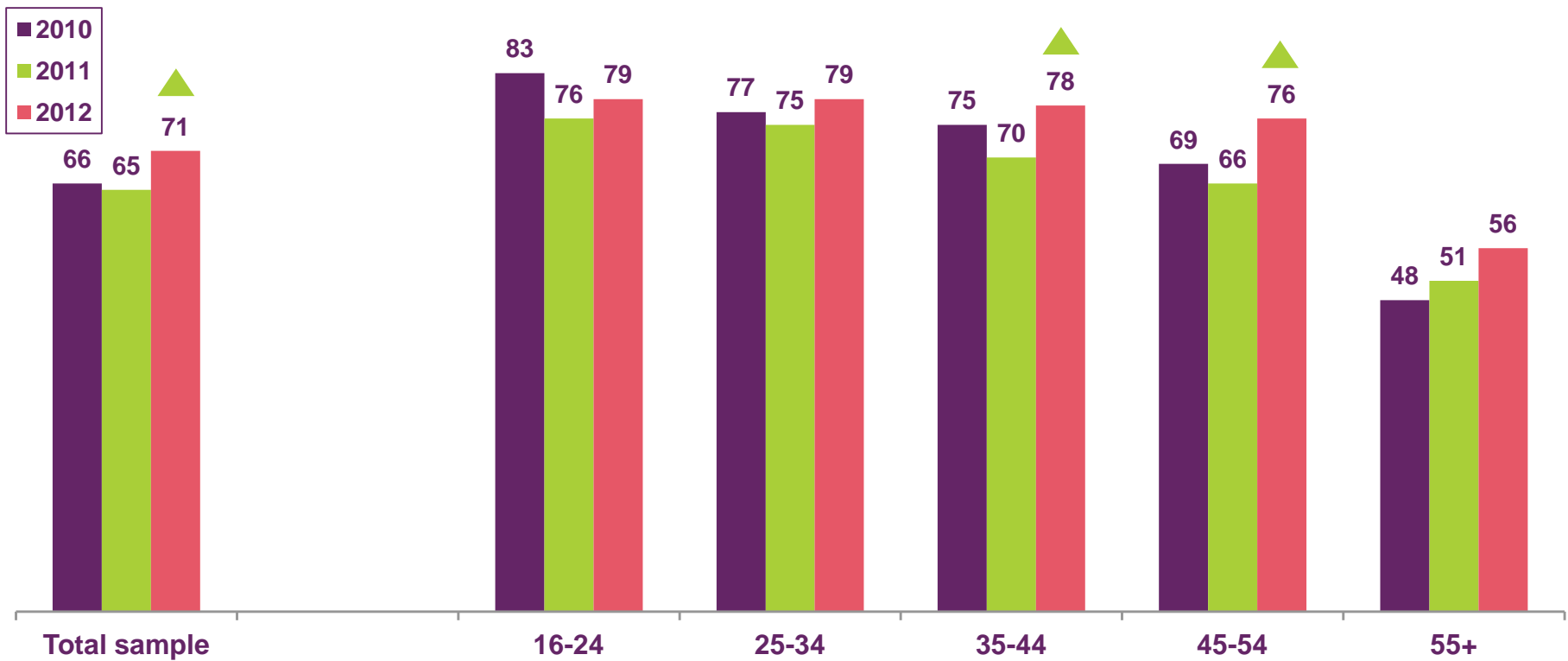
Base: All with Sky, Virgin or broadband TV (4060,1722,1790), 16-24 (630,273,296), 25-34 (1157,292,316), 35-44 (1098,362,385), 45-54 (1241,304,302), 55+ (2015,491,491)

DVR use



Question changed in 2011 to “Do you use a digital recorder for your TV service that allows you to record programmes onto a hard drive, and pause and rewind live TV? For example, Sky Plus, V Plus, BT Vision V-Box or Freeview Plus.”
 Previously was “Do you use a recorder for your TV service that allows you to record programmes onto a hard drive, and pause and rewind live TV. Sky Plus, V Plus, BT Vision V-Box all have this as part of the service? Alternatively a digital recorder can be a separate set-top-box (DVR)?”
 Base: All in 2010 (6964), 2011 (3109) and 2012 (3025), 16-24 (685,466,455), 25-34 (1257,490,493), 35-44 (1176,597,578), 45-54 (1312,522,487), 55+ (2525,1034,1012)

Any non-linear viewing (DVR, TV on demand or online viewing)



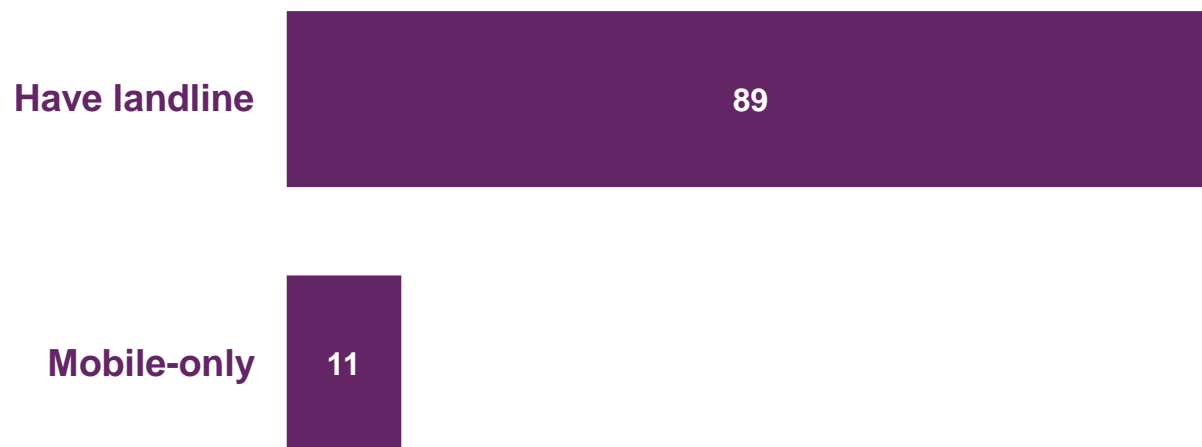
▲ Shows significant differences from 2011 to 2012 at 99% level

Usage of any time shifting to watch TV

Base: All in 2010 (6964), 2011 (3109) and 2012 (3025), 16-24 (685,466,455), 25-34 (1257,490,493), 35-44 (1176,597,578), 45-54 (1312,522,487), 55+ (2525,1034,1012)



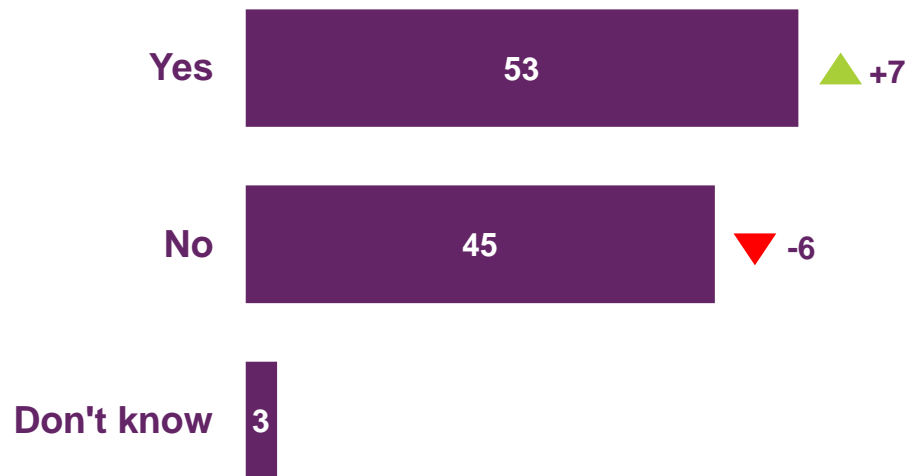
Mobile-only households



No significant differences from 2011 to 2012 at 99% level

Q2 Do you have a landline telephone at home that you can use to make or receive calls?
Base: All respondents (3025)

HD service received in household



 Shows significant differences from 2011 to 2012 at 99% level

Q37a Does your household get a High Definition TV service? To get the service you will need to have a special HD set-top box from either Sky, Virgin Media, Freesat or Freeview, as well as an HD TV set.

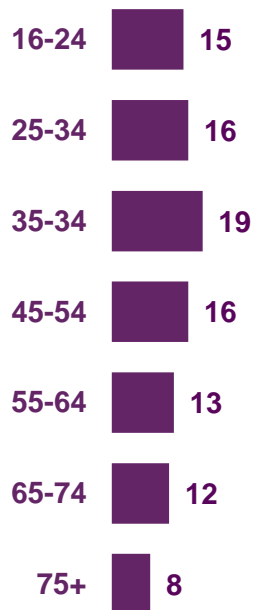
Base: All respondents (3025)



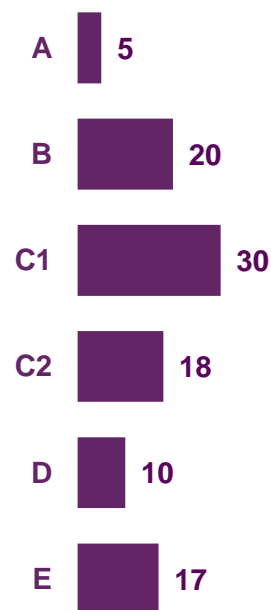
Gender



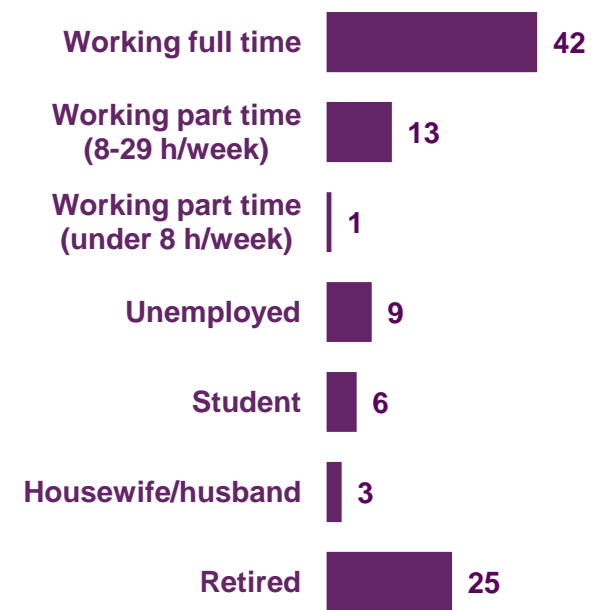
Age

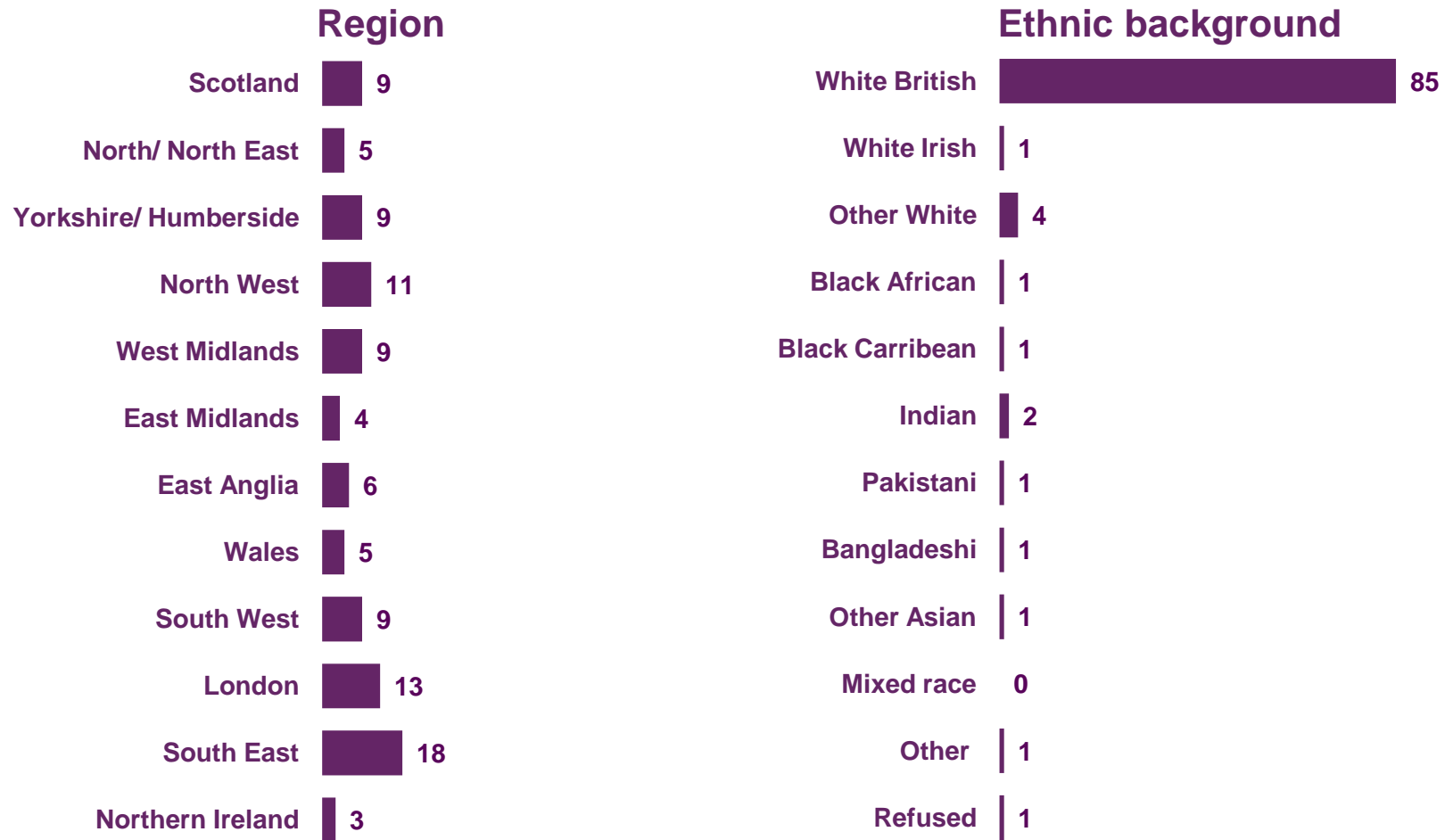


Social Class



Working status

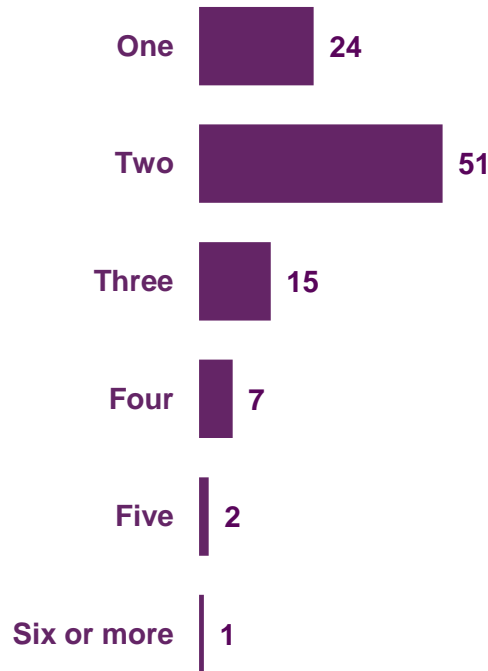






Household size and composition

Number of adults (16+) in household



Children under 16 in household



Responsible for children under 16



Demographics

Q38 How many ADULTS aged 16+ including yourself, live in your household?

Q7 Are there any children under 16 in your household?

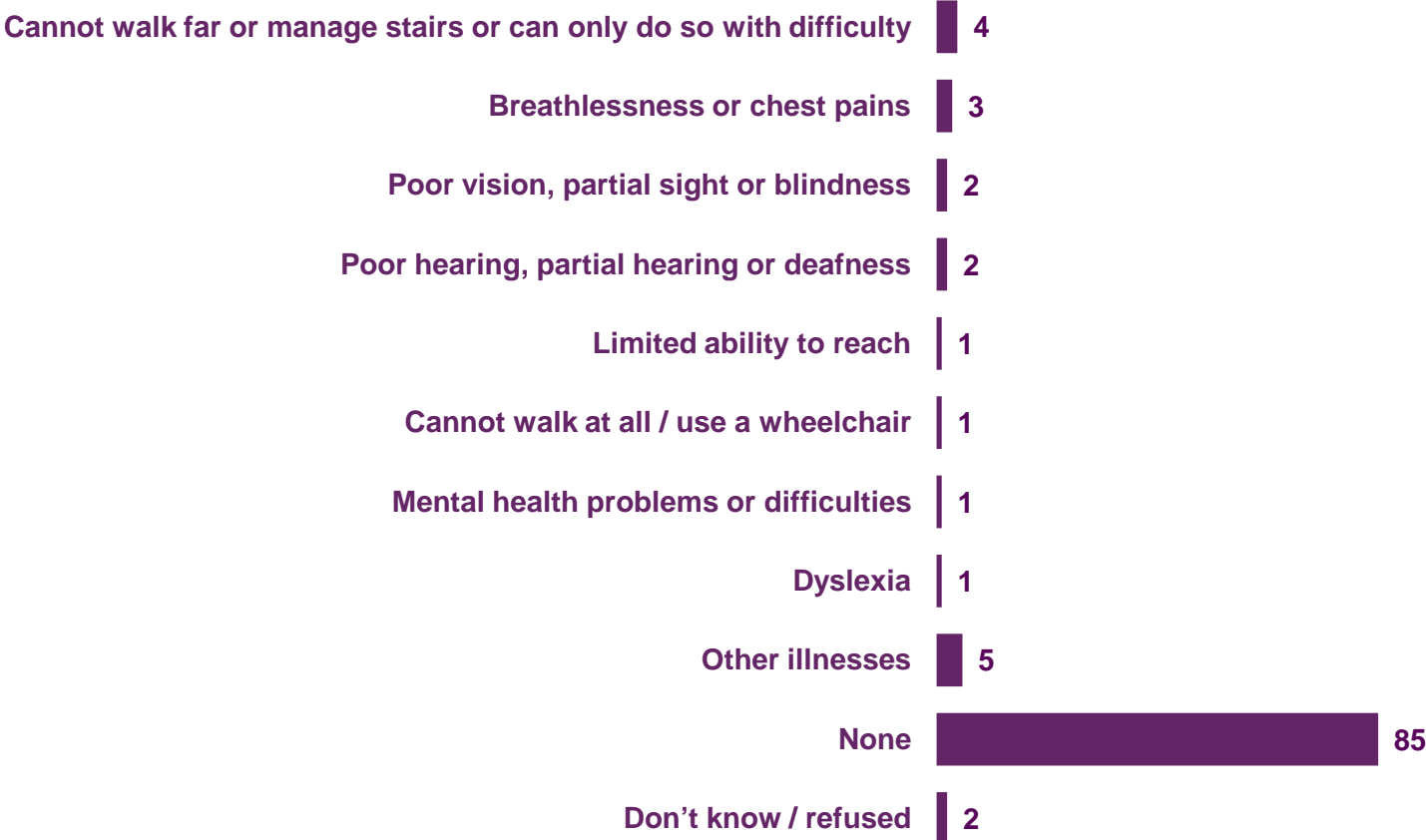
Q8 Thinking about the children under 16 in your household, please can you tell me how many fall into each of the following age bands?

Q9 And are you responsible for the children under 16 in your household? In other words – are you their parent or carer?

Base: All respondents (3025)



Limitations in daily activities or work



Q41 Which of these, if any, limit your daily activities or the work you can do?
Base: All respondents (3025)