

Regional News

Summary Report

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Prepared for:



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1 INTRODUCTION

1.1 Background

Ofcom (Office of Communications) is the regulator for the UK communications industries, with responsibilities across television, radio, telecommunications and wireless communications services. Section 264 of the Communications Act 2003 requires Ofcom to assess the designated public service broadcasters, taken together, in terms of their delivery of the public service purposes set out in the Act.

Ofcom carried out its first PSB (Public Service Broadcasting) Review in 2004, the second is underway and due to complete in early 2009. The public service broadcasters are the BBC, ITV1 and GMTV1, Channel 4, Five, S4C, and Teletext. Each of these has a specific remit as set out in the 2004 PSB Review.

ITV1's remit is to focus on news and high production value origination from around the UK, with special additional responsibility for the provision of regional news, current affairs and other regional programming.

The objectives of the 2008-9 Review are:

- To evaluate how effectively the public purposes of public service broadcasting are being met by the public service broadcasters, particularly in light of changes to the way audiovisual content is consumed and delivered;
- To assess the case for continued intervention in the delivery of audiovisual content to secure public service purposes;
- To consider whether and how the emergence of new ways of delivering content to consumers and citizens might require change in the regulatory framework for public service broadcasting; and

- To assess future options for funding, delivering and distributing public service broadcasting, in the context of the uncertainty established in the first PSB Review about the sustainability of traditional funding models.

ITV Proposals

Alongside this, ITV submitted proposals to Ofcom advocating revised national and regional services on ITV1. Specifically, ITV proposed a reduced number of regional services from 2009. In most cases, this would comprise the removal of sub-regional programmes and opts that have been added over time. For the smallest ITV regions - West/West Country and Border/Tyne Tees – services that are currently separate would be merged. Short sub-regional opts would be maintained (until digital switchover in 2012) for West/West Country, Border/Tyne Tees, and East/West Midlands

ITV also proposed significant reduction of regional news minutage.

A qualitative study and a quantitative survey were commissioned to explore the issues raised by the ITV proposals in detail, to be used existing research and audience analysis.

This report covers the quantitative survey.

1.2 Objectives

Primary objective:

- To assess the likely impact of ITV's proposals for regional news provision on citizen/consumers

Specific research objectives were:

- What do they think of ITV's role with regard to news?
- What are their priorities in terms of regional content provision?
- How are respondents' views affected when they are forced to choose between different available options?
- Do these views vary by region, demographic, or other factors?

2 RESEARCH METHODOLOGY

2.1 Research approach

All interviews were conducted face to face in respondents' homes, using pen and paper. A face to face approach was adopted because of the need to explain to and ensure respondents understood the definition of ITV regions, sub-regions and local area. Local area was defined as within a 10 mile radius of where they reside.

To ensure representation across the UK, interviews were conducted across all ITV regions, including Wales, Northern Ireland and Scotland. Only the Channel Islands were excluded. One sample point was included on the Isle of Man.

All interviews were conducted between Wednesday June 11th and Friday 27th June.

2.2 Sampling quotas

Respondents were adults, living in the UK, aged 16 or over. A total of 3,706 interviews were conducted; 2,624 in England, 624 in Scotland, 225 in Wales and 233 in Northern Ireland. In England, a minimum of 200 interviews were achieved in each of the ITV regions. This was to allow more detailed analysis within each region.

Within each region, additional quotas were placed on age, gender, social group and town size to ensure representiveness. A further quota on TV platform was placed on a nation level. Full details of quotas and achieved interviews can be found in appendix A.

Sampling points (postcodes) were selected at a sub-regional level, with the split dependent on population size. 20 sample points were randomly selected for every 200 required interviews. An Ofcom provided database of postcodes by ITV regions was used for the random selection.

An important point to note is that regional analysis is conducted based on the ITV region which is most frequently watched by respondents. Due to the overlap of ITV regions, this will not always correspond to the region in which they reside.

2.3 Questionnaire structure

The majority of the questionnaire comprised standard questions, covering; viewing behaviour (BBC and ITV), satisfaction with elements of news delivery (BBC and ITV), attitudes to proposed changes and demographics. Social group was based on the occupation of the main income earner, the full definitions of which can be found in Appendix B.

The questionnaire was customised by nation, to allow for the differences in regional news provision and provider, that is ITV1 in England, ITV Wales, UTV in Northern Ireland and STV in Scotland. Where results are aggregated across the UK, the report makes reference to ITV/STV/UTV. In Border Scotland, the provider is ITV Border.

Two specialised analysis techniques, chip allocation and max diff, were used to measure the relative importance of different elements of regional news. Different elements of news were included depending on whether regional or sub-regional news was available, hence the options and patterns of responses differ by region.

In the chip allocation exercise respondents have to allocate 15 chips across the available statements. In the max diff exercise they have to pick the least and most important from a randomised set of statements.

The chip allocation gives a good gauge of how people rate the importance of each of the elements when they are not forced to choose or trade off the different elements – generally they tend to spread the chips fairly evenly across the available options.

The max diff analysis is much more differentiating and provides a good indication of how people would prioritise different elements when they are forced to choose.

A full technical explanation of these methodologies can be found in Appendix C.

The questionnaire sections can be summarised as:

- Section A: Screener questions
- Section B: TV viewing behaviour (region / programmes / sources of news)
- Section C: Importance of attributes (Chip allocation, Max Diff and satisfaction rating)
- Section D: Attitudes to regional news provision (response to possible changes)
- Section E: Demographics

The questionnaire took between 15 and 20 minutes to administer.

2.4 Statistical reliability

Only statistically significant differences between results are commented on in the report. All significance testing is conducted to 95%. In essence this means that there is a 95% chance that observed differences would be seen again if the study were repeated.

2.5 Weighting

To fine tune the representiveness of the data collect by the quotas, rim weighting was applied based on the same variables as the quotas. Further to this, an additional weight was applied based on regional population to ensure that the UK results were representative by region. Unweighted bases are shown throughout this report to illustrate the number of respondents interviewed.

2.6 Structure of this report

An Executive Summary follows this Introduction. There then follows an assessment of current regional news provision in terms of usage and satisfaction. We then look at the importance of relative aspects of regional news programming, followed by an assessment of the reactions to the proposed changes. The report concludes with an overview of the key differences in each region, grouping regions where appropriate, according to how they might be affected by proposed changes to provision.

3 EXECUTIVE SUMMARY

Sources of regional news

The two main PSB channels, BBC1 and ITV1, are the most common sources of regional news across the UK. However, while overall BBC1 is used most commonly, particularly in London where 81% name BBC1 as a source of regional news compared to 54% for ITV1, ITV1 is more commonly used in Scotland and Northern Ireland, most notably in STV North, where 69% name ITV1 as a source compared to 44% for BBC1.

Newspapers are generally the next most common source of regional news after the two PSB channels, typically used by half or more respondents. Radio is used equally with newspapers in Northern Ireland. These patterns generally hold true for main sources of regional news. The exception is in STV North, where BBC1 has only a small role to play and newspapers are as likely as ITV1 to be the principal source. BBC1 has a similarly small part to play in the two STV regions for Scottish news, where ITV1 is twice as likely to be the main source. However in Border Scotland BBC1 and ITV1 are used equally for news about Scotland.

Sources of sub-regional news

BBC1 and ITV1 are the most common sources of sub-regional news, but are less dominant than they are for regional news. However, the pattern of usage remains similar; BBC1 is typically used more often for sub-regional news in English regions, most notably in the West Country region (59% compared to 41% using ITV1). Conversely, ITV1 is a more common source for sub-regional news in the Scottish regions, in particular STV North (45% compared with 26% using BBC1). Newspapers are a common source of sub-regional news, used not much less than the PSB channels, and in STV Central and North are used almost equally with BBC1 and ITV1. This pattern of usage is also reflected in the main sources people use for sub-regional news.

Sources of local news

These patterns of usage also broadly hold true for sourcing local news. Thus BBC1 and ITV1 are used most commonly for local news, but newspapers compete closely to provide this information, particularly outside of England. BBC1 remains strong in

England, and in particular the West Country, whereas audiences in the Scottish regions are more likely to turn to ITV1. ITV1 is relatively strong in both Border regions as a provider of local news. In STV Central and North newspapers are the main source of local news (as they are in London and Meridian).

The BBC website www.bbc.co.uk/whereilive is used much more often to source both regional and local news than the ITV equivalent. Typically a fifth regularly use the ITV website, rising to two-fifths in some regions (UTV, Tyne Tees). However, half of respondents in every region except UTV (35%, where ITV usage is high) use the BBC website regularly for regional or local news. Regular usage of the BBC website tends to be highest where BBC1 tends to be least used (Scotland and Wales). The STV website is regularly used by a quarter of respondents in Scotland to source regional news, with a third regularly using for news about their local area.

Frequency of watching news programmes

About half of those living in each region claim to watch the UK news on ITV1 on a daily basisⁱ. Such frequent viewing is more common in Scotland, and less common in London. This pattern is largely true for regional news, although these programmes attract a smaller daily audience than UK news programmes. UK current affairs programmes on ITV1 are typically watched by about half of those in each region a few times a month, with Scottish viewers again more frequent, except in Border Scotland, where these programmes are viewed relatively less. Regional current affairs programmes attract a broadly similar audience, although there is a stronger core of very regular viewers (one fifth typically claiming to watch regional current affairs programmes on a daily basis). The way in which news and weather are scheduled together means that these two programmes tend to have a very similar audience profile.

The weekend early evening regional news on ITV1 slot is the most important in terms of audience size, watched on a regular basis by around four-fifths of respondents in each region, followed by the equivalent weekday slot (two-thirds). The weekday breakfast slot also attracts a relatively large audience (approximately two-fifths of respondents watch regularly). Availability to watch clearly depresses the audience for other slots.

ⁱ Note that these figures are based on claimed viewing levels and therefore may not fully correspond with audience data such as BARB

According to the research, the size of audience for UK news, weather and current affairs programmes on BBC1 is broadly comparable to that for the equivalent programmes on ITV1. There is a slight tendency for BBC1 programmes to attract a smaller audience where ITV1 is strong (in STV North for example), but generally there is less regional variation in the audience profile of these BBC1 programmes.

However, regional news and weather programmes on BBC1 attract a smaller audience than their ITV1 counterparts. Only a third of respondents in most regions claim to watch regional news on BBC1 on a daily basis, whereas this figure is typically at least two-fifths for ITV1, rising to more than half in some regions. The BBC1 regional profile remains flatter than for ITV1, although Border Scotland, UTV, West Country and ITV Wales daily viewers number around two-fifths. Elsewhere in Scotland BBC1 appears less popular for regional news, although this is a result of the BBC not broadcasting news at a regional level in Scotland. BBC1 regional current affairs programmes attract a slightly smaller regular audience than ITV1 equivalents, but the regular audience is larger than for the BBC's own UK current affairs programmes.

Satisfaction with regional news

There is a high level of satisfaction with the current regional news provision from both ITV1 and BBC1. BBC1 tends to attract slightly higher ratings across the board. Respondents living in the Scottish regions tend to be slightly less satisfied with the output from both channels (although not more dissatisfied), and those in London tend to be less positive about ITV1 regional news.

However, respondents are often less satisfied with the geographical coverage provided by regional news. Around a fifth of respondents in most regions are very satisfied with regional news on several aspects regarding programme quality. Respondents in Granada are often more positive than most other regions.

However, satisfaction is notably lower for the local focus of such programmes for both channels, in particular in Scotland and London, where the proportion who are very satisfied is only one in ten. Actual dissatisfaction with the local focus is relatively high for both ITV and BBC in Scotland. Both channels fare better for regional rather than local

coverage (Scottish/national outside of England). Nonetheless, those living in Border Scotland are less satisfied with the regional coverage of either channel (which in this case would be coverage of Scottish news), and Londoners are less positive about ITV.

Broadly speaking, those living in England and Wales are more satisfied with the BBC regional coverage, whereas those living in Scotland and Northern Ireland are more positive about the ITV coverage. However, Border Scotland respondents are notably less satisfied with coverage of their region by ITV than other regions. STV North respondents are most critical of the three Scottish regions regarding BBC's coverage of their region – Border Scotland is most positive.

Satisfaction with sub-regional news on both channels is suppressed to some extent by the inability of a significant proportion of respondents to give a rating. The deliberative research conducted by Ofcom at the same time as this quantitative research suggested that while viewers are aware of the ITV/BBC regions and can readily identify their local area, they are far less familiar with the concept of a sub-region. This may be in part because the sub-regions are not necessarily clearly identified in news programmes which are in fact delivered on a sub-regional basis. These factors may contribute to the apparently contradictory results from this quantitative research on the importance of and satisfaction with sub-regional news. However, there is evidence of real dissatisfaction with the sub-regional coverage from both channels in the Scottish regions, peaking in Border Scotland for both ITV and BBC.

Importance of regional news delivery

In English regions where there are sub-regions, and thus any changes to regional news provision are most likely to impact, analysis shows that “*responds quickly to breaking stories*” and a “*focus on my local area*”, are consistently rated as highly important, while “*coverage of news across my sub-region*” is the lowest priority. There is little variation by region, although in West Country and Border England, “*focus on my local area*” is a slightly higher priority than “*responds quickly to breaking stories*”, but “*coverage of news across my sub-region*” remains near the bottom of the list. The pattern of responses in the unaffected regions (those without sub-regions) is similar, although “*coverage of news across my region*” moves ahead of “*focus on my local area*”.

Overall, the priority order of news in Border Scotland is similar to that for the STV regions, but the importance placed on “*focus on my local area*” is much higher than elsewhere. Satisfaction levels are also significantly lower for ITV news provision in Border Scotland compared against all other regions – this applies across all elements but particularly for “*focus on my local area*” (28% dissatisfied).

There is a strong well of opinion that regional news should be shown on more than one of the main PSB channels, at least a third of those in each region saying this is very important. It is even more important to those in Border Scotland, although less important than average to those in Border England. Respondents in Scotland hold similar views regarding Scottish news as they do regional news. The availability of sub-regional news on more than one channel is generally far less of an issue. Views are most polarised in the West Country region, where the number of sub-regions may make this more of an issue, although even here it is seen as more important for regional news to be on more than one channel than it is for sub-regional news.

Response to possible changes in ITV1 regional news provisionⁱⁱ

There is strong interest in regional news, and so people are unlikely to agree that they would be immune to any changes. This view was most strongly held in Border Scotland, but was also common in Granada. Thus it is perhaps not surprising that there is relatively little agreement with any proposals that would reduce coverage. There is very little support for trading off local coverage to maintain the quality of regional programming, most notably in Border Scotland where 57% disagree with this proposal. In the STV regions in Scotland around a third of people are in favour of regional reporting being incorporated into a nationwide programme. In Border Scotland views on this are mixed, with roughly equal proportions agreeing (35%) and disagreeing (40%).

There is broad opposition in Scotland, Wales and Northern Ireland to any proposals that see national coverage in the nations reduced, even if it is in order to maintain quality. The nations also soundly reject the notion that news in their nation could simply be left

ⁱⁱ Note that these results should not be directly compared with the deliberative research, which provided the opportunity for participants to discuss potential changes and implications at length over the course of the day and evaluate proposals from a more informed perspective.

to the BBC. Similar results emerge in England, with low levels of agreement that regional news could be left to the BBC, particularly in Granada and Border England.

4 TELEVISION VIEWING BEHAVIOUR

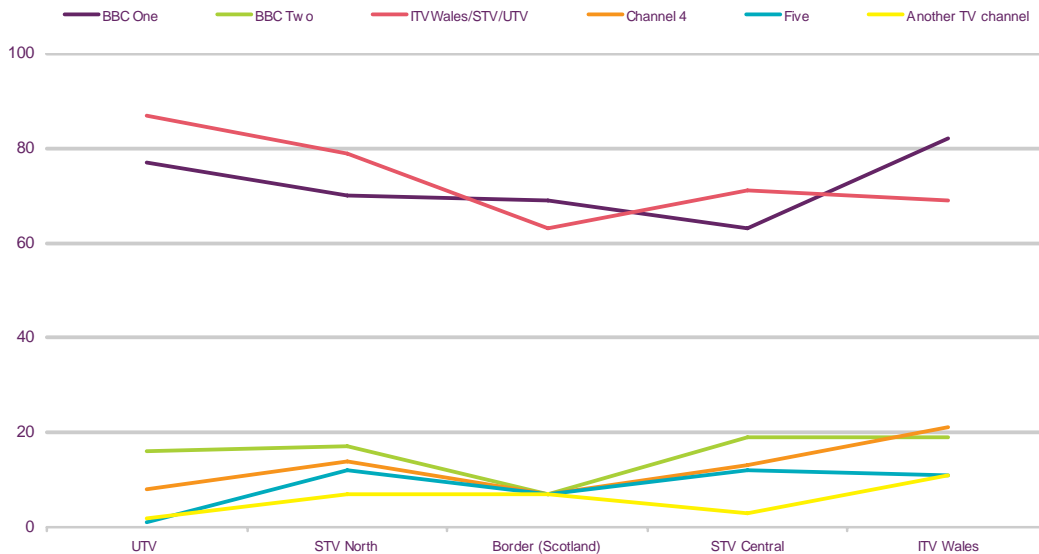
Respondents were asked a number of questions about their current viewing habits. We look first at the usage of television and other media as sources of local, regional (and sub-regional where applicable) and national news. We then look at the audience for various types of programme at a UK, national, regional, sub-regional and local level, including which regional news bulletins are watched

4.1 Sources of news

4.1.1 Sources of national news

Figure 1: Television channels used as a source of national news

QB6 Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? - News about NI/Scotland/Wales



Source: Holden Pearmain

Base: Total sample Scotland n=624, Wales n=225, NI n=233; minimum sample in any region n=200

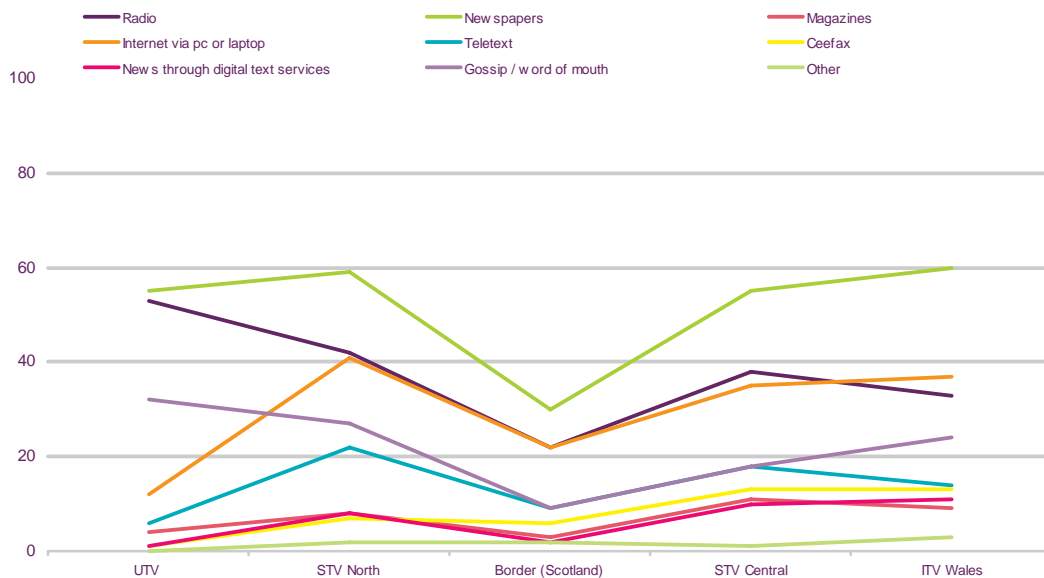
Respondents in Scotland, Wales and NI were asked to identify from a list of the different media that are available to them (such as television, radio, internet) those that they use as a source for news about their nation. The two main PSB channels, BBC1 and STV are the most common sources of news about Scotland in all three regions. In the STV regions STV has approximately a 10% advantage, whereas in Border Scotland BBC1 is

slightly favoured for Scottish news. Other TV channels are relatively uncommon sources of national news. Wales stands out as being much more reliant on BBC for national news than on ITV Wales.

The role of non-television sources of news is similar for Scottish news as it was for regional news. Thus newspapers and radio are the most common alternative sources of Scottish news in all 3 regions, although as for regional news, each source is less commonly used in the Border region. Radio is another common source of regional news, usage being particularly widespread in UTV, where it is on a par with newspapers.

Figure 2: Other sources of regional news

QB6 Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? - News about NI/Scotland/Wales



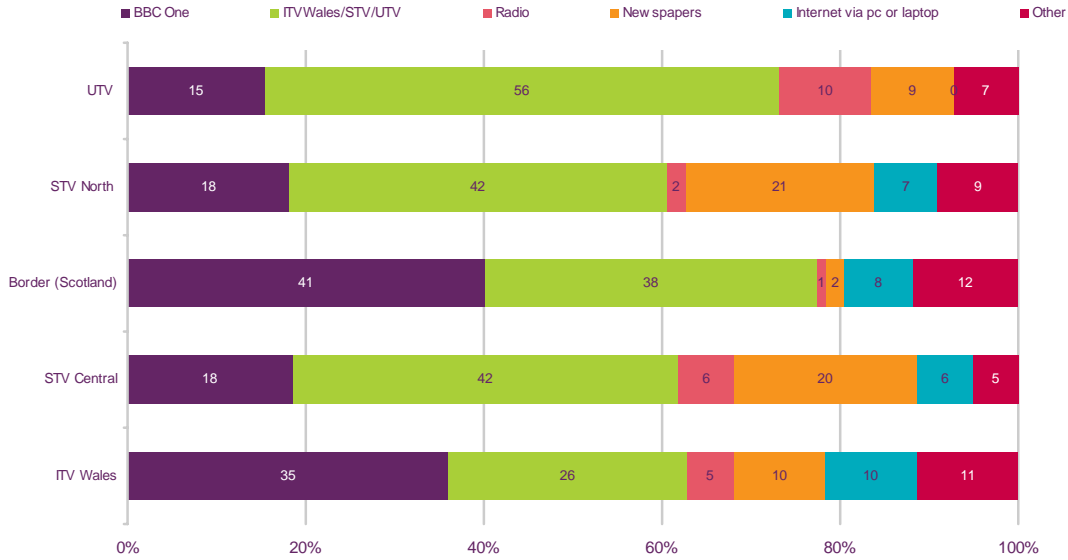
Source: Holden Pearmain
 Base: Total sample Scotland n=624, Wales n=225, NI n=233; minimum sample in any region n=200

In terms of the main source of news about Scotland, the role of BBC1 is much diminished in Scotland, in particular in STV Central and North, where it is cited as the principle source by less than one fifth of respondents. In these regions STV is twice as likely to be the main source of such news, and is in fact the most common main source. In STV Central and North newspapers are just as likely to be the main source of news about Scotland as BBC1. In Border Scotland the picture is different. Here BBC1 and

ITV Border share the role as main provider of Scottish news, with newspapers having very little impact. The internet has a small role to play in each region.

Figure 3: Main source of national news

QB7 And which of these would you say is your main source for... ? - News about NI/Scotland/Wales



Source: Holden Pearmain

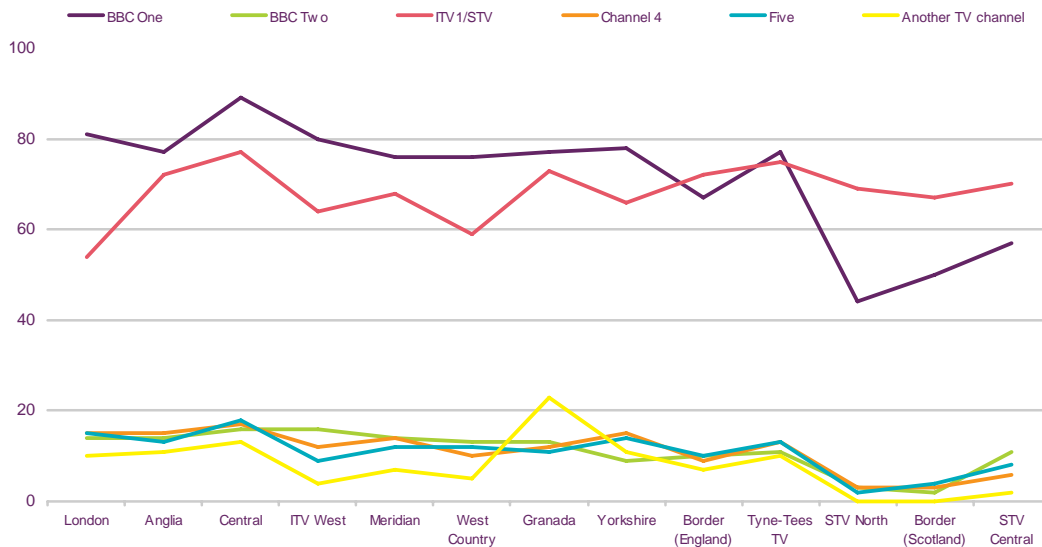
Base: Total sample Scotland n=624, Wales n=225, NI n=233; minimum sample in any region n=200

4.1.2 Sources of regional news

All respondents were asked to identify from a list of the different media that are available to them (such as television, radio, internet) those that they use as a source for news about their region. Figure 4 shows the proportion naming a television channel.

Figure 4: Television channels used as a source of regional news

QB6 Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? - News about your region (England & Scotland only)



Source: Holden Pearmain

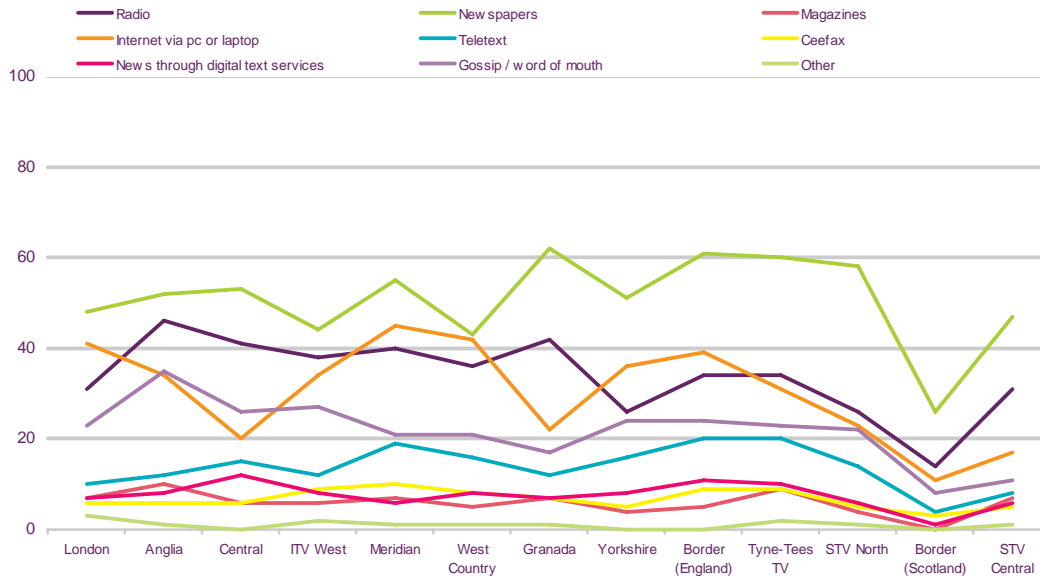
Base: Total sample England n=2,624, Scotland n=624; minimum sample in any region n=200

As might be expected, the two largest PSB channels, BBC1 and ITV1/STV, are named most often as a source of regional news, far more commonly than any other television channel. In most television regions approximately four out of five respondents identify BBC1 as a source. Slightly fewer name ITV1 as a source, typically hovering around 70% of respondents. BBC1 is favoured most heavily over ITV1 in London (81% compared with 54%). However, in STV North, Border Scotland and STV Central STV has an advantage over BBC1, most notably in STV North (69% compared with 44%). This will largely be an effect of the coverage, as the BBC does not broadcast regional news in Scotland, (BBC news is at a national level in Scotland). The two channels are of broadly equal standing in Border England and Tyne-Tees TV. There are relatively minor variations in the use of TV channels other than BBC1 and ITV1/STV as a source of regional news.

Figure 5 shows to what extent media other than TV are used as a source for regional news. Most other media are used substantially less often as a source of regional news compared to the main TV channels, BBC1 and ITV1/STV.

Figure 5: Other sources of regional news

QB6 Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? - News about your region (England & Scotland only)



Source: Holden Pearmain

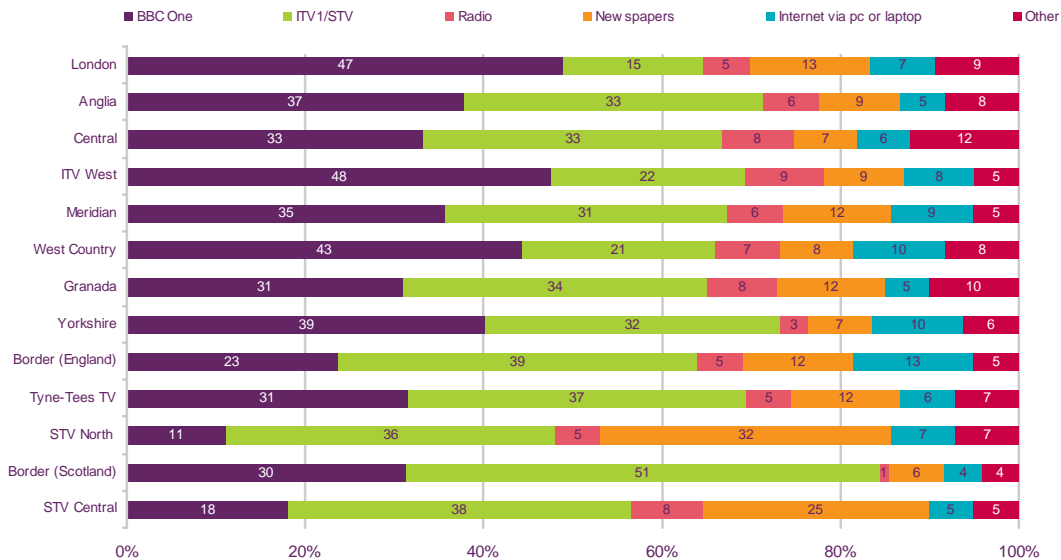
Base: Total sample England n=2,624, Scotland n=624; minimum sample in any region n=200

Newspapers are the most common alternative source of regional news, used by half or more of respondents in most regions. Border Scotland is the exception, where a quarter (26%) claim to use newspapers as a source of regional news. However, respondents in this region are less likely than those in other regions to use many of the non-TV sources. After newspapers, radio and the Internet, the most common alternative to TV as a source of regional news is non-commercial: word of mouth. Other sources of regional news are relatively rarely used, and are broadly on a par with TV channels outside of the big two, BBC1 and ITV1/STV.

When respondents were asked to name their main source of regional news, responses largely reinforced the findings described above. Thus Figure 6 shows that the main source of regional news is most commonly BBC1 or ITV1/STV, the exception being STV North, where BBC1 is infrequently used, and newspapers are almost as commonly used as STV. The same pattern is evident in STV Central, although television has a stronger presence there than in STV North.

Figure 6: Main source of regional news

QB7 And which of these would you say is your main source for... ? - News about your region



Source: Holden Pearmain

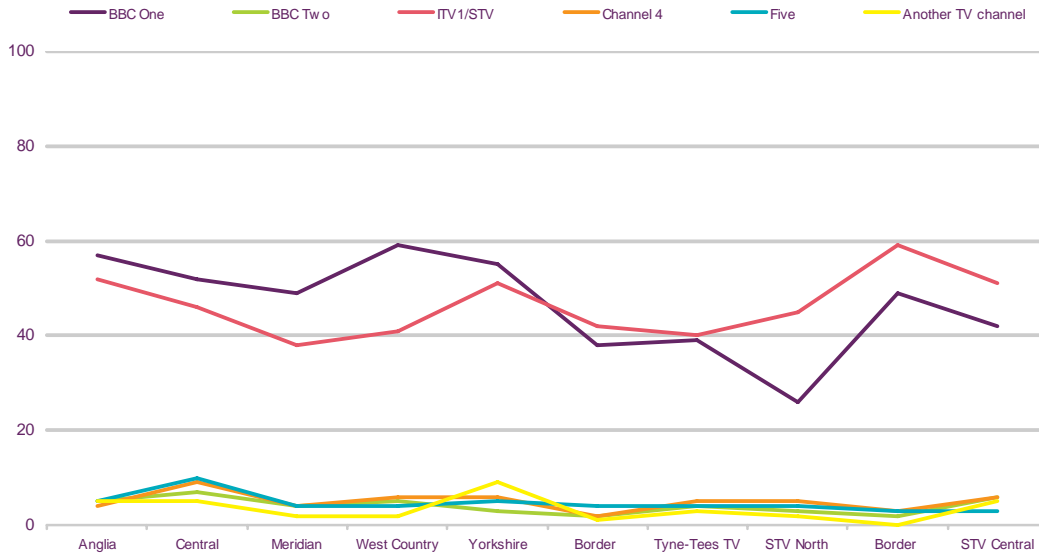
Base: Total sample England n=2,624, Scotland n=624; minimum sample in any region n=200

4.1.3 Sources of sub-regional news

In areas where it was relevant, respondents were asked to identify their sources of news about their sub-region. BBC1 and ITV1/STV are again the principle sources, but less dominant than was the case for regional news. Here too also, BBC1 is more commonly used in English TV regions, most notably in the West Country (59% using BBC1 for sub-regional news compared with 41% using ITV1). Conversely STV is a more common source for such news in the Scottish regions, in particular STV North (45% using STV compared with 26% using BBC1). Again this is a result of the BBC not broadcasting news at sub-regional level in Scotland. TV channels other than BBC1 and ITV1/STV are very rarely used for sub-regional news.

Figure 7: Television channels used as a source of sub-regional news

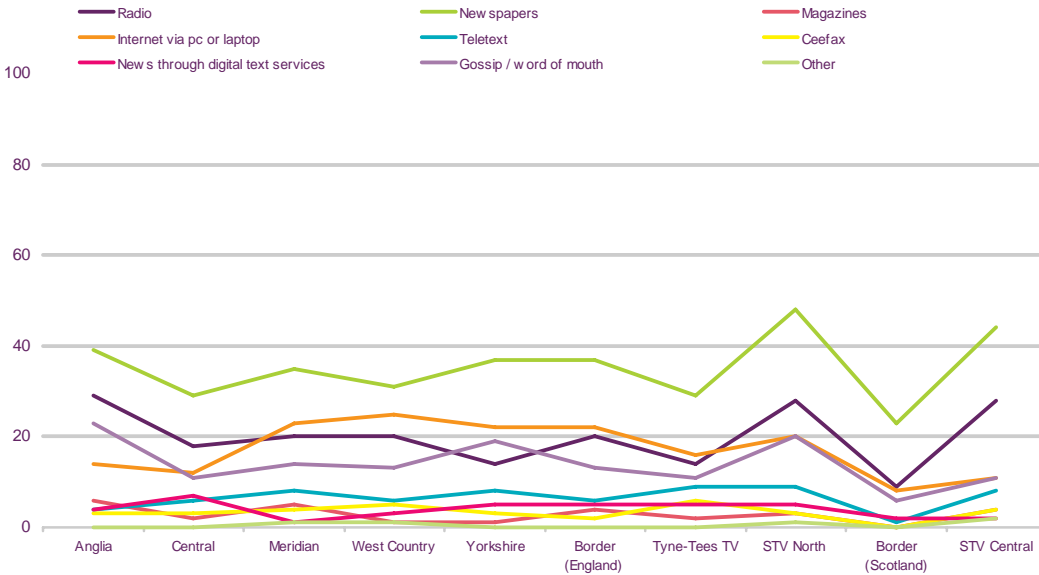
QB6 Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? - News about your Sub region



Source: Holden Pearmain
 Base: Total sample England n=2,624, Scotland n=624; minimum sample in any region n=200

Figure 8: Other sources of sub-regional news

QB6 Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? - News about your Sub region



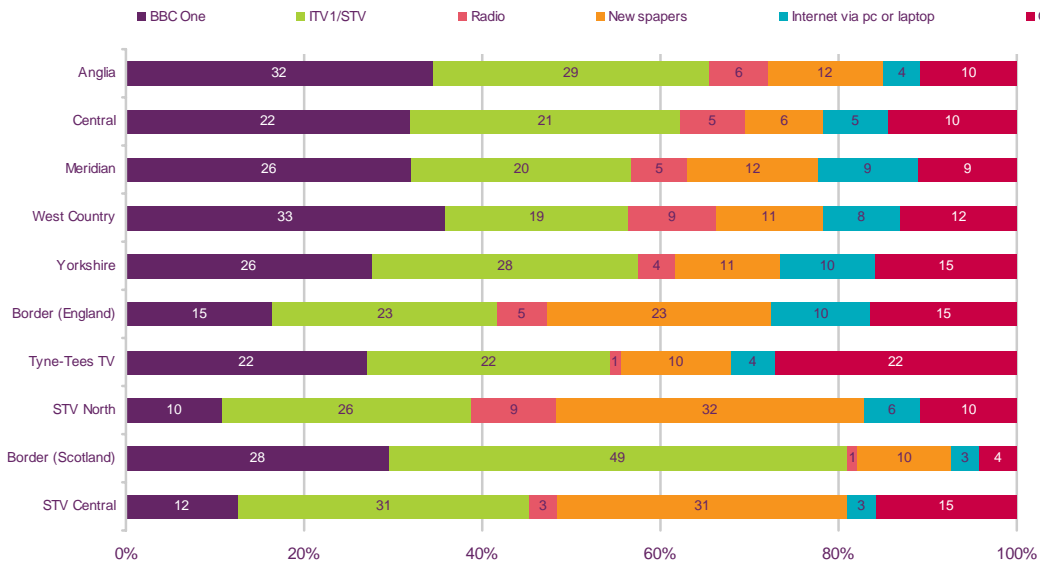
Source: Holden Pearmain
 Base: Total sample England n=2,624, Scotland n=624; minimum sample in any region n=200

Newspapers are the most common source of sub-regional news outside of television for all regions. However, as for other news, they are used most commonly in STV Central and North.

Given the reduced role of BBC1 and ITV1/STV in the provision of sub-regional news, it is not surprising that these two PSB channels are less likely to be the main source of sub-regional news than they were for regional news (Figure 9). Nonetheless, in many regions the two channels account for half or more of main sources of sub-regional news, broadly sharing this role. However, as before, BBC1 has a major role to play more often than ITV1 in the West Country, whilst STV is stronger in Scottish regions. However, as seen before, newspapers are a much more important source of sub-regional news in STV Central and North, being the most common main source in each (solely and jointly with STV respectively). In fact, for sub-regional news, newspapers have a more important role to play generally than they do for news covering a larger geographical area.

Figure 9: Main source of sub-regional news

QB7 And which of these would you say is your main source for... ? - News about your Sub region



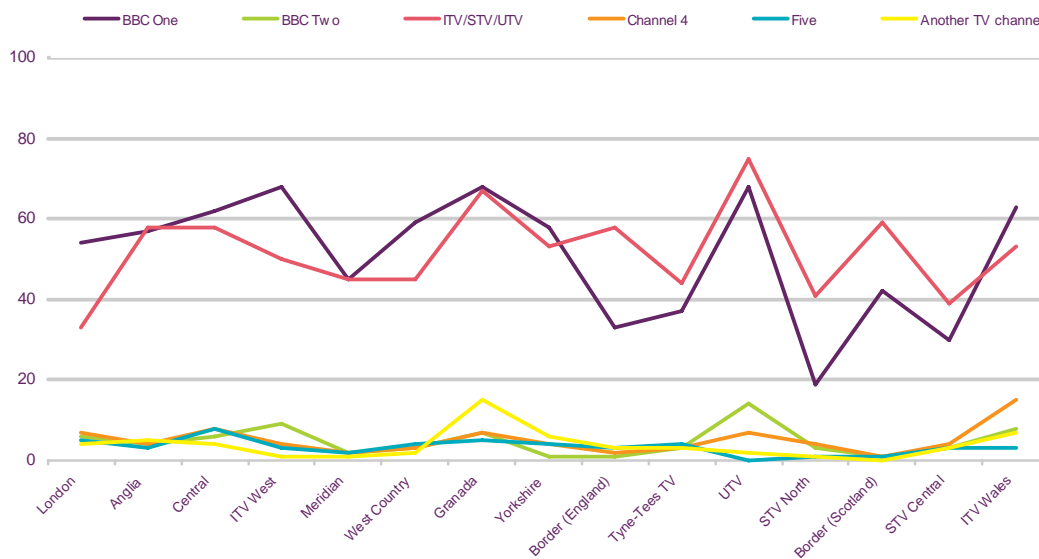
Source: Holden Pearmain
 Base: Total sample England n=2,624, Scotland n=624; minimum sample in any region n=200

4.1.4 Sources of local news

BBC1 and ITV/STV/UTV are used to source local news at a similar level to their use for sub-regional news, although for local news there is more variation by TV region. Here too BBC1 tends to be more commonly used in England and Wales, whereas respondents in Scottish regions are more likely to turn to STV for local news. ITV is used more in Border (both Scotland and England), whereas BBC1 is favoured more in the West Country. Respondents in NI are particularly likely to turn to either of the PSB channels for their local news. As we have seen before, BBC1 is notably weak in STV regions. Other TV channels are rarely used for local news.

Figure 10: Television channels used as a source of local area news

QB6 Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? - News about your Local Area

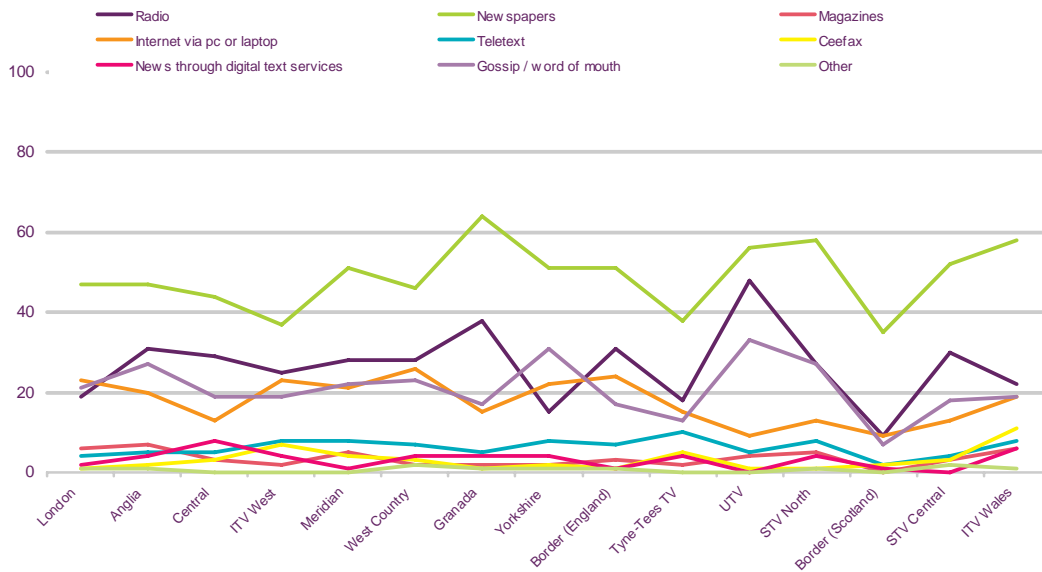


Source: Holden Pearmain
 Base: Total sample England n=2,624, Scotland n=624, Wales n=225, NI n=233; minimum sample in any region n=200

Newspapers are the most common alternative source of local news and compete closely with BBC1 and ITV1 as a provider of such information. Approximately half of respondents in each area use newspapers for this purpose. Newspapers are a particularly common source of local news in Granada, and also most areas outside of England, namely STV Central and North, UTV and ITV Wales. Radio and word of mouth are other fairly common sources of local news. Radio is particularly strong in UTV, and to a lesser extent Granada.

Figure 11: Other sources of local area news

QB6 Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? - News about your Local Area

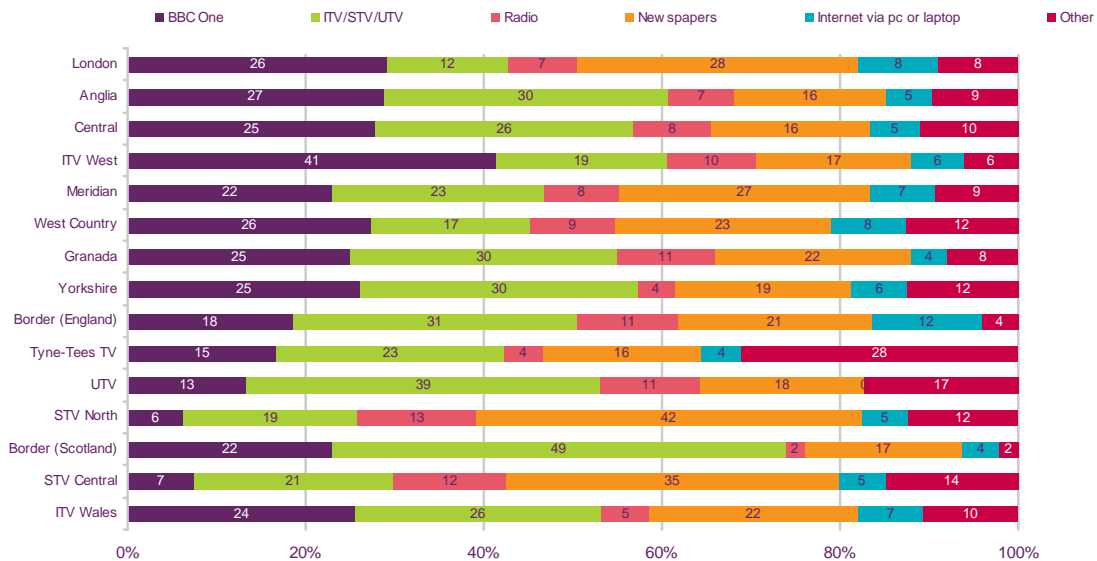


Source: Holden Pearmain
 Base: Total sample England n=2,624, Scotland n=624, Wales n=225, NI n=233; minimum sample in any region n=200

When respondents were asked to identify their main source of local news their responses confirmed the important role newspapers have to play at this level. Nonetheless, either BBC1 or ITV/STV/UTV are the main source of local news for at least half of respondents in nearly all regions. Some familiar patterns apply. For most of England and Wales these two PSB channels are used broadly equally as the main provider of local news. However, in London and the West BBC1 has a much greater role to play than ITV1. Conversely, in Scotland and the Borders, and also in UTV and to some extent Tyne Tees ITV/STV/UTV is more often the main provider (on television at least) of local news. In STV Central and North BBC1 has a very small role, and in fact in these two regions newspapers are the primary source of local news (as they are in London and Meridian).

Figure 12: Main sources of local area news

QB7 And which of these would you say is your main source for... ? - News about your Local Area



Source: Holden Pearmain

Base: Total sample England n=2,624, Scotland n=624, Wales n=225, NI n=233; minimum sample in any region n=200

4.1.5 Usage of websites for regional and local news

Respondents were also asked about their use of websites run by the BBC, ITV and STV to access regional and local news. Figure 13 shows the proportions using www.itvlocal.com (England and Wales) or <http://stv.tv/> (Scotland) to access news about their region and local area. Across the UK as a whole just over a third (37%) claim to have ever used the ITV or STV website for this purpose, and a quarter use it regularly, usage is slightly higher in Scotland than it is in England or Wales. Overall usage levels are similar for both regional and local news, but people are more likely to regularly use the websites for news about their local area than about their region.

Figure 13: Usage of www.itvlocal.com or http://stv.tv/ for regional news

QB8 Which of the following websites have you ever used as a source for news about your...
www.ITVlocal.com or http://stv.tv/



Source: Holden Pearmain
Base: Those who use the Internet for news about their region n=1,256
* NI not reported n=10

Across the UK, the ITV website is used more regularly as a source for local news.

A similar question was asked regarding usage of the BBC equivalent www.bbc.co.uk/wherelive (and equivalents for Scotland, Wales and Northern Ireland).

Figure 14: Usage of www.bbc.co.uk/wherelive for regional news

QB8 Which of the following websites have you ever used as a source for news about your...
www.bbc.co.uk/wherelive/Scotland/Wales/NorthernIreland



Source: Holden Pearmain
Base: Those who use the Internet for news about their region n=1,256
* NI not reported n=10

These sites are used considerably more often. Across the UK, three-quarters have ever used the BBC website for regional news, and 62% use it regularly. English respondents are most likely to never use the site for regional news (24%), but regular usage is high across all nations.

Similarly, the pattern of usage of the www.bbbc.co.uk/whereilive site for local news is very similar to how it is used for regional news.

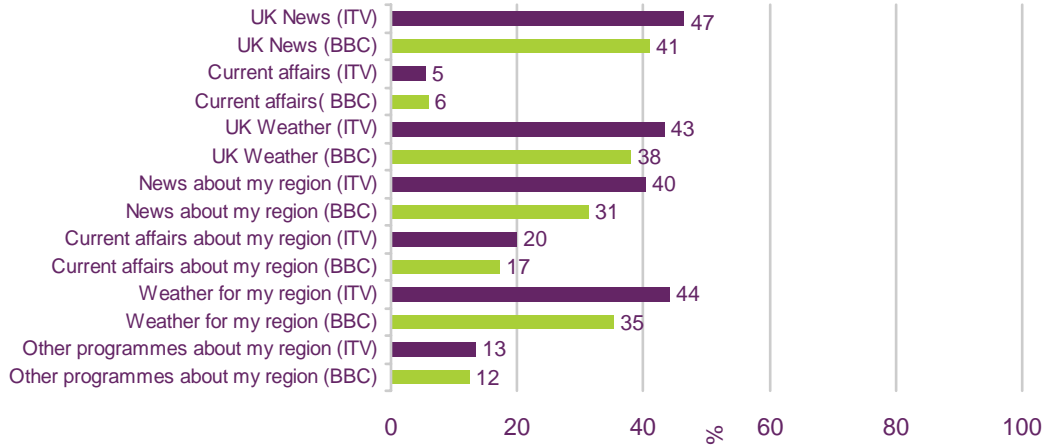
4.2 Frequency of watching news programmes

All respondents were asked how often they watched certain types of programmes on ITV/STV/UTV and BBC1. We begin by looking at the daily UK audience for these various types of programme at a UK level, before a closer look at each programme type at a regional level.

Across the UK as a whole the UK news and weather attract the largest daily audience on either ITV/STV/UTV or BBC1. The regional news on each channel attracts a significantly smaller although still sizable audience compared with the UK equivalent. In fact the regional news on ITV/STV/UTV attracts the same daily audience as the UK news on BBC1. Regional news and weather is where there is most disparity between ITV/STV/UTV and BBC1, the former having an audience nine percentage points greater for both programme types. On both channels, regional current affairs programmes are much more likely to attract a daily audience than UK equivalents (although this may be impacted by the type and frequency of programming available).

Figure 15: Daily viewing of types of programme

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on...? – Every Day



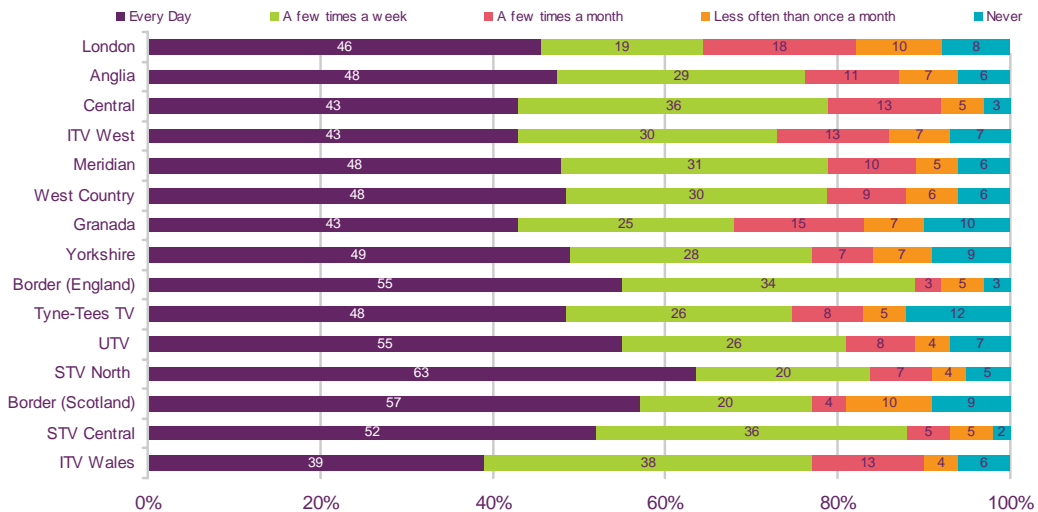
Source: Holden Pearmain
Base: Total sample size n=3,706

4.2.1 Frequency of watching programme types on ITV/STV/UTV

Figure 16 shows the frequency of watching UK news.

Figure 16: Frequency of watching UK news on ITV/STV/UTV

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on ITV/STV/UTV? - UK news



Source: Holden Pearmain
Base: Total sample size n=3,706, minimum sample in any region n=200

According to responses to the questionnaire, this type of programme attracts a large audience, with approximately half of respondents in each region watching daily. Daily viewing is higher in Scotland, peaking at 63% in STV North, where we have already seen STV is relatively strong. Only in ITV Wales does daily viewing of UK news on ITV dip below two-fifths of respondents (39%).ⁱⁱⁱ

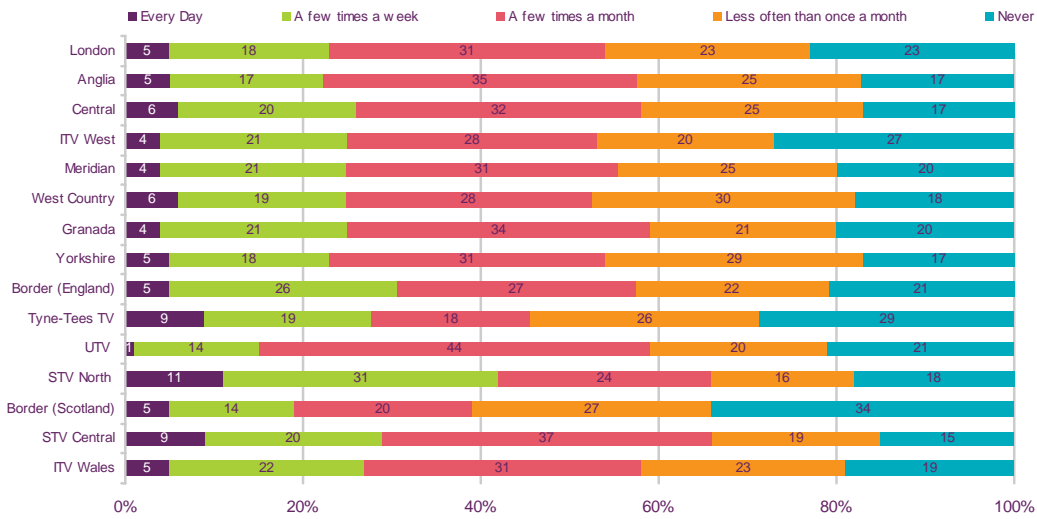
The research shows that weekly audience for UK news on ITV/STV/UTV is much higher. Approximately three-quarters of respondents in most regions claim to watch these programmes at least a few times a week. A broadly similar pattern emerges, with weekly viewing most common in STV Central (88%) and STV North (83%). Respondents in London (65%) and Granada (68%) are least likely to be watching the UK news on ITV1 a few times a week or more. Three-quarters (77%) of respondents in ITV Wales watch at the frequency, which is around the average – they are only marked out by their lack of daily viewing.

Respondents were also asked how often they watch current affairs programmes on ITV/STV/UTV such as Tonight with Trevor McDonald. As would be expected, the frequency of viewing is lower for what are typically less frequent programmes (for example, Tonight with Trevor McDonald is twice weekly). Nonetheless about a half of respondents in most regions claim to view such programmes at least a few times a month. A similar pattern emerges, with respondents in STV Central and North most likely to watch the programme this frequently. Respondents in Border Scotland and Tyne Tees are the least likely to watch current affairs programmes at least a few times a month (39% and 46% respectively). A substantial minority of respondents in each region never watch such programmes.

ⁱⁱⁱ For more accurate data on viewing, see BARB data.

Figure 17: Frequency of watching current affairs programmes on ITV/STV/UTV

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on ITV/STV/UTV? - Current Affairs programmes

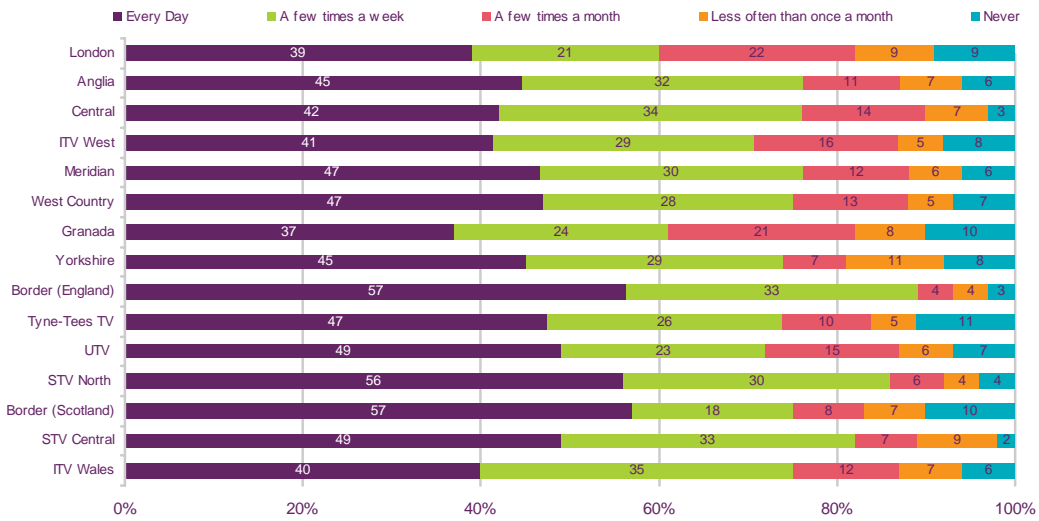


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

The UK weather is shown several times a day on ITV/STV/UTV and so it is not surprising this attracts a large regular audience. Approximately half of respondents in most regions watch this programme every day. Here too daily viewing tends to be most common in Scotland, being most common (57%) in the Border region (both Scotland and England). Respondents in Granada (37%) and London (39%) are least likely to watch the UK weather on ITV1 on a daily basis. Given that news and weather are typically scheduled together it is not surprising that viewing frequencies for the two types of programme are broadly similar.

Figure 18: Frequency of watching UK weather on ITV/STV/UTV

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on ITV/STV/UTV? - UK weather

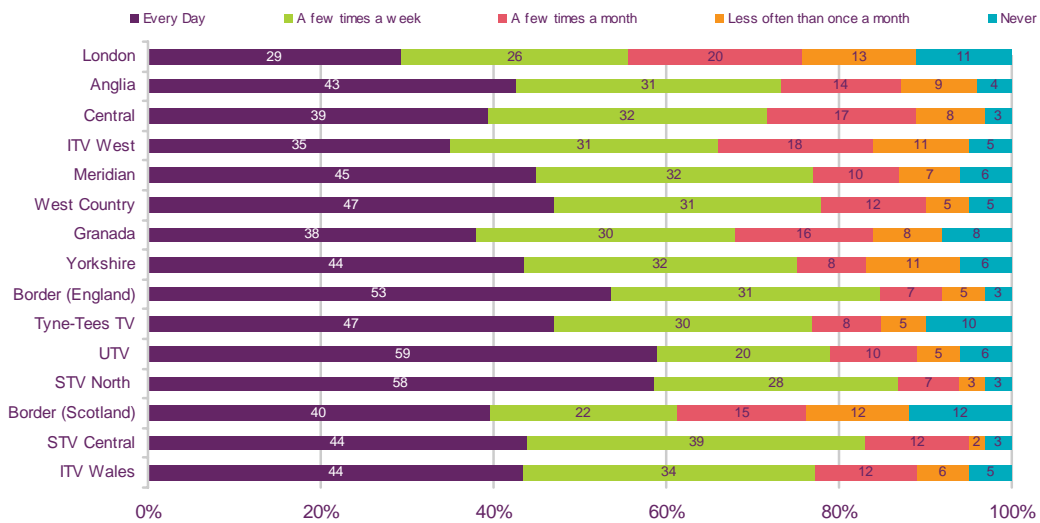


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

Respondents were also asked how often they watched news about their region (or in the case of Wales and Northern Ireland their nation) on ITV/STV/UTV. The pattern of response broadly matches that for watching UK news on ITV/STV/UTV, although frequencies are somewhat less (this may reflect the relative scheduling frequency of UK and regional news, or their relative importance/interest). Thus respondents in STV North and UTV regions are most likely to watch regional news programmes on STV/UTV, although respondents in other Scottish regions are relatively less likely to watch STV regional news programmes on a daily basis than they are UK news. Londoners are the least likely to watch regional news on ITV1 daily (29%).

Figure 19: Frequency of watching regional news on ITV/STV/UTV

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on ITV/STV/UTV? - News about my (region/Wales /NI)

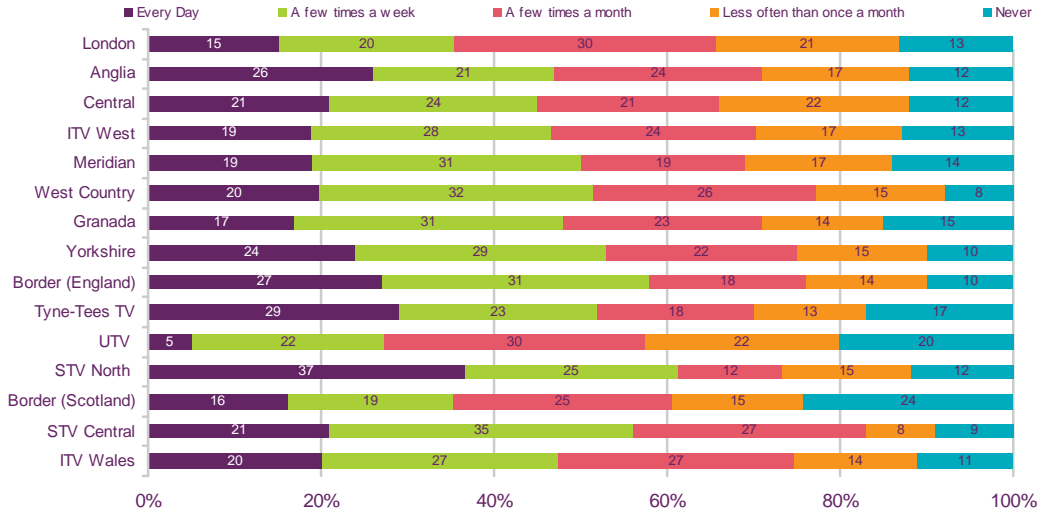


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

Regional current affairs programmes on ITV/STV/UTV attract a more regular audience than their UK equivalents. Approximately one fifth of respondents in most regions watch such programmes on a daily basis, and in most areas half of respondents claim to be watching at least a few times a week. Here too respondents in STV North are most likely (37%) to claim to be viewing such programmes on a daily basis and 62% are watching at least a few times week. London respondents are again amongst the most unlikely to watch on a daily basis (15%), although such viewing behaviour is almost non-existent in UTV (5%).

Figure 20: Frequency of watching regional current affairs programmes on ITV/STV/UTV

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on ITV/STV/UTV? - Current affairs about my (region/Wales /NI)

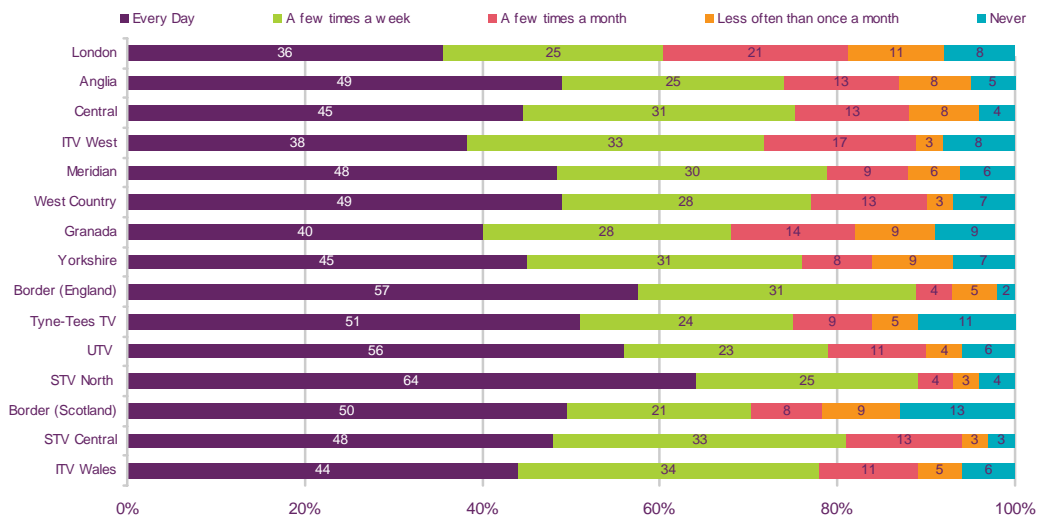


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

The audience profile for frequency of watching regional weather on ITV/STV/UTV is very similar to that watching the UK weather. Approximately half of respondents in most regions watch regional weather programmes on ITV/STV/UTV on a daily basis. Daily viewing is uniformly high in Scotland, the Borders and Tyne Tees, as well as UTV, peaking in STV North at 64%. Respondents in London are least likely to watch the regional weather on ITV1 so frequently (36%).

Figure 21: Frequency of watching regional weather on ITV/STV/UTV

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on ITV/STV/UTV? - Weather for my (region/Wales /NI)

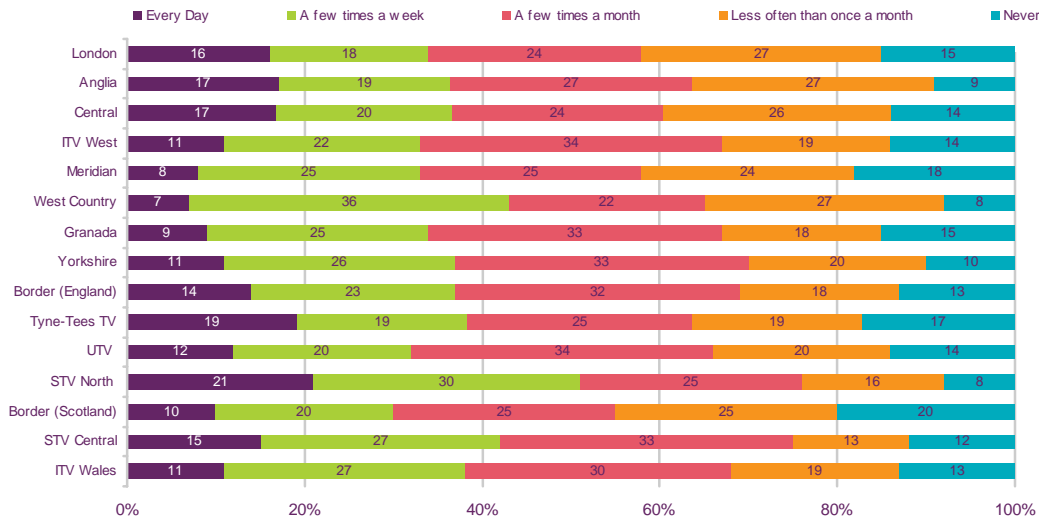


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

Respondents were finally asked how frequently they watched other regional programmes (aside from news, weather and current affairs) on ITV/STV/UTV. Such programmes tend to be watched less frequently, with typically less than one in five respondents watching on a daily basis. Nonetheless, a third or more in each region claim to watch such programmes on ITV/STV/UTV a few times a week or more. Although STV North respondents, as for most programme types, claim to watch most frequently, there is a less marked viewing pattern than for other programme types assessed. This may be because this programme type is less well defined than previous examples (such as news or weather).

Figure 22: Frequency of watching other regional programmes on ITV/STV/UTV

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on ITV/STV/UTV? - Aside from news, current affairs and regional weather, other programmes about my (region/Wales /NI)



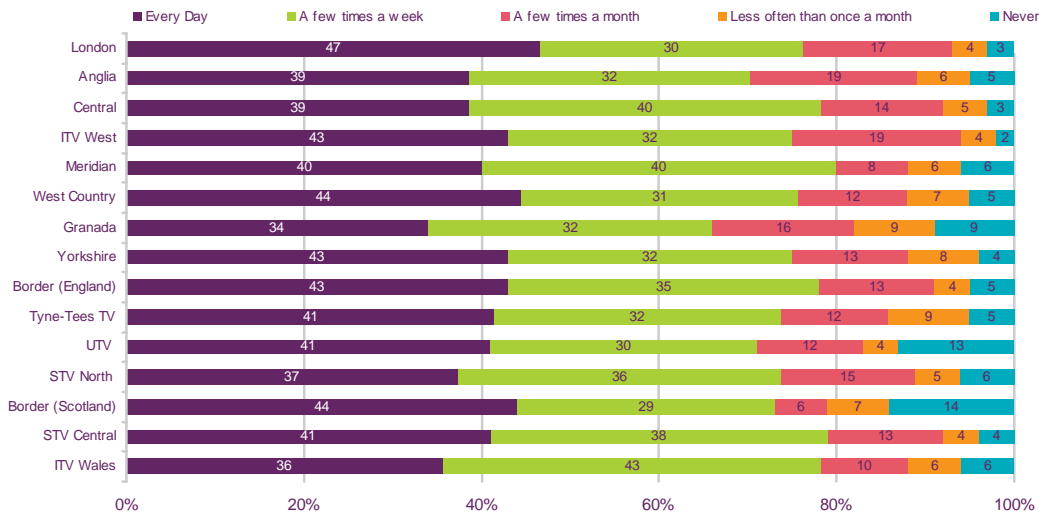
Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

4.2.2 Frequency of watching programme types on BBC1

The frequency with which respondents watch UK news on BBC1 is broadly similar to the frequency with which they watch the equivalent programmes on ITV1. However, there is less variation in the frequency of viewing across the regions. There is some tendency for those regions where ITV/STV/UTV is watched more frequently to watch BBC1 less frequently, and vice-versa, but this is only a moderate distinction. Thus nearly half (47%) of those in London watch the UK news on BBC1 on a daily basis, whereas in an STV “stronghold”, STV North, this figure is lower than average (37%), although not the lowest.

Figure 23: Frequency of watching UK news on BBC1

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on BBC1? - UK news

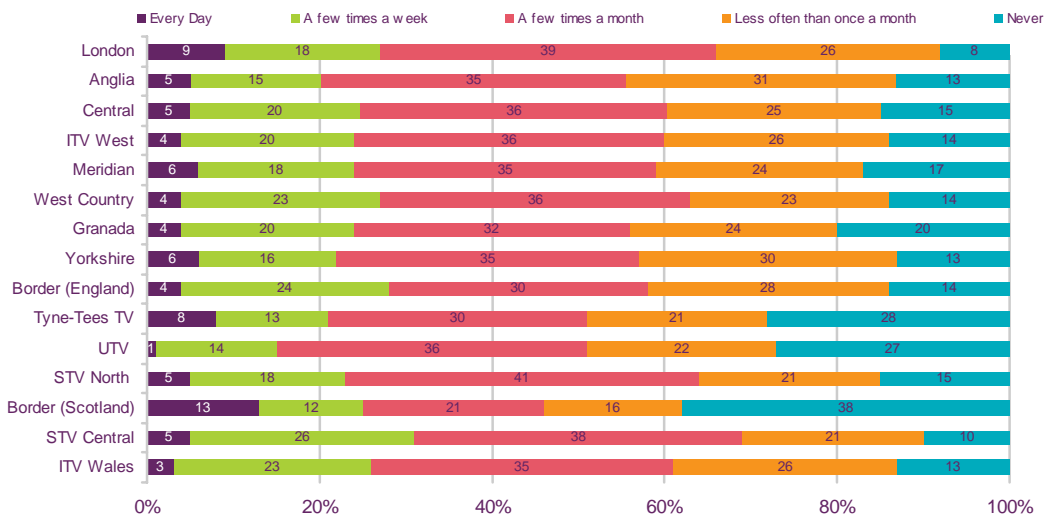


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

Similarly, there is relatively little regional variation in the frequency of watching current affairs programmes such as Panorama. The frequency of watching also broadly matches that seen for similar programmes on ITV/STV/UTV. Thus typically less than one in ten watch current affairs programmes on BBC1 on a daily basis, rising to around a quarter of respondents in most regions who watch a few times a week or more. Respondents in UTV are particularly unlikely to watch current affairs programmes on BBC1 with any great frequency. As for ITV/STV/UTV, a substantial minority in each region never watch such programmes.

Figure 24: Frequency of watching current affairs programmes on BBC1

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on BBC1? - Current Affairs programmes

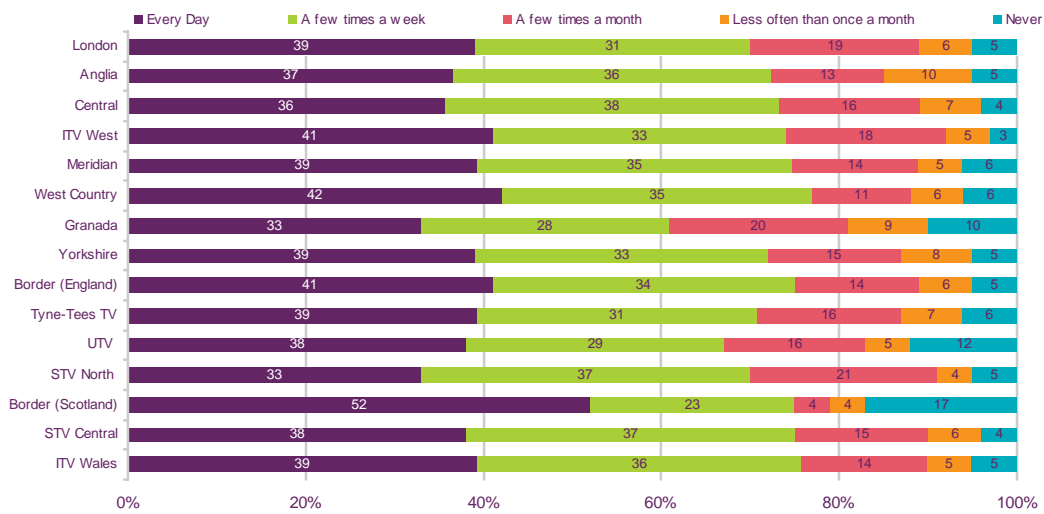


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

As for ITV/STV/UTV, the frequency of watching the UK weather on BBC1 tracks the frequency of watching the UK news on this channel, largely as a result, one presumes, of adjacent scheduling. Here too there is relatively little regional variation, although Border Scotland stands out for the 52% who watch the UK weather on BBC1 on a daily basis. Although STV North, where respondents more commonly use STV for news and weather coverage, shows the lowest proportion (joint with Granada) watching UK weather on BBC1 every day (33%), this figure is nonetheless not substantially out of line with other regions.

Figure 25: Frequency of watching UK weather on BBC1

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on BBC1? - UK weather



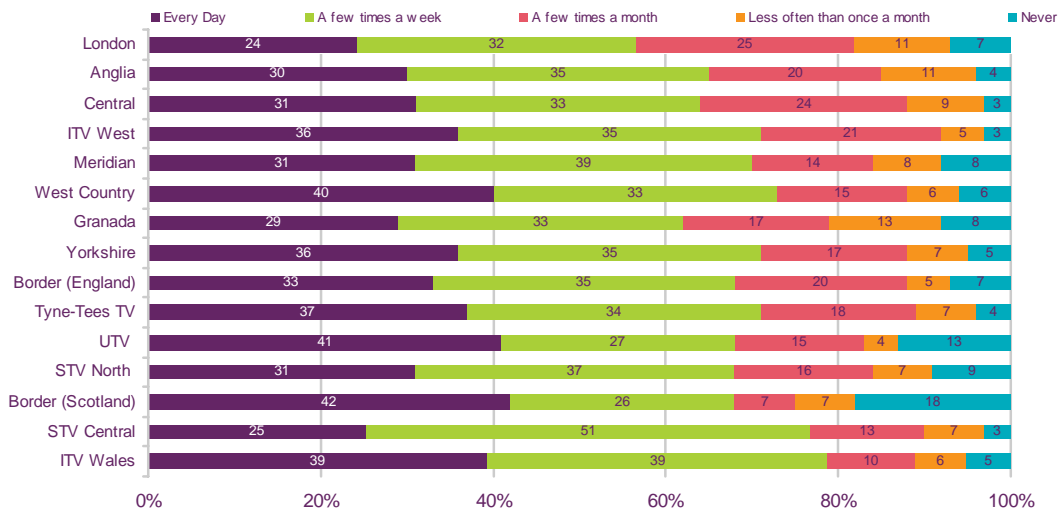
Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

Approximately one-third of respondents across most regions watch regional news on BBC1 daily, and approximately two-thirds watch such programmes on BBC1 at least a few times a week. This frequency of viewing is notably less than for similar programmes on ITV/STV/UTV, particularly with regard to daily viewing. On ITV/STV/UTV, in some regions half or more of respondents are watching regional news on a daily basis, although the proportion watching at least a few times a week is more comparable between the two channels.

As seen previously, viewing frequency shows less regional variation than for the equivalent ITV/STV/UTV programmes. Nonetheless, Border Scotland UTV, West Country and ITV Wales are all notable in that two-fifths of respondents watch regional news on BBC1 daily. Respondents in London and STV Central are least likely to watch at this frequency (24% and 25% respectively).

Figure 26: Frequency of watching regional news on BBC1

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on BBC1? - News about my (region/Wales /NI)

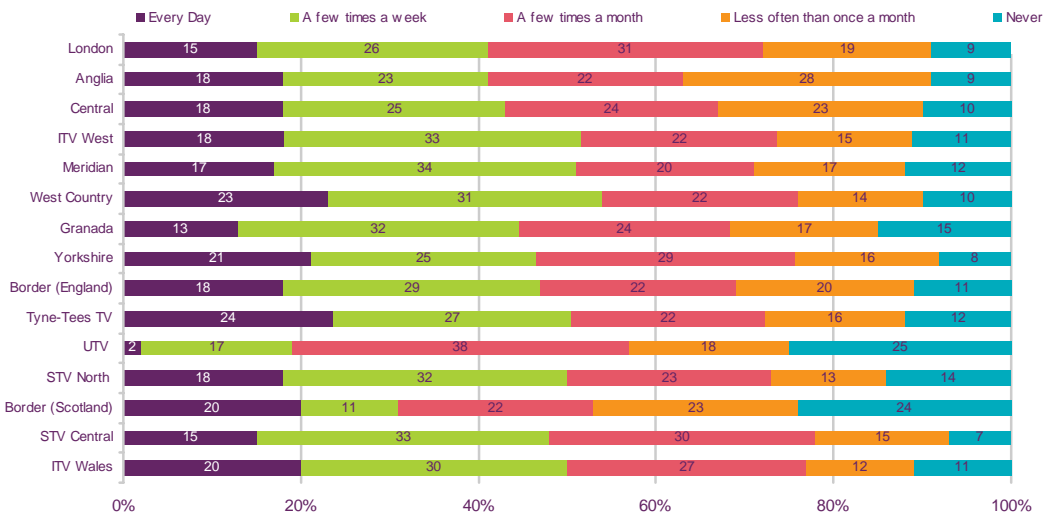


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

Regional current affairs programmes are watched more frequently on BBC1 than their UK-wide equivalent. Approaching one in five respondents in most regions claim to watch this frequently, rising to nearly a quarter in Tyne Tees (24%) and West Country (23%). However, as was true for UK current affairs programmes, respondents in UTV are very unlikely to watch regional current affairs programmes on BBC1 on a regular basis. A quarter of respondents in this region never watch such programmes, as is true for Border Scotland also. Elsewhere, approximately one in ten never watch regional current affairs programmes on BBC1. This pattern of behaviour is broadly in line with that for the equivalent ITV/STV/UTV programmes, although on average the latter are watched a little more often.

Figure 27: Frequency of watching regional current affairs programmes on BBC1

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on BBC1? - Current affairs about my (region/Wales /NI)

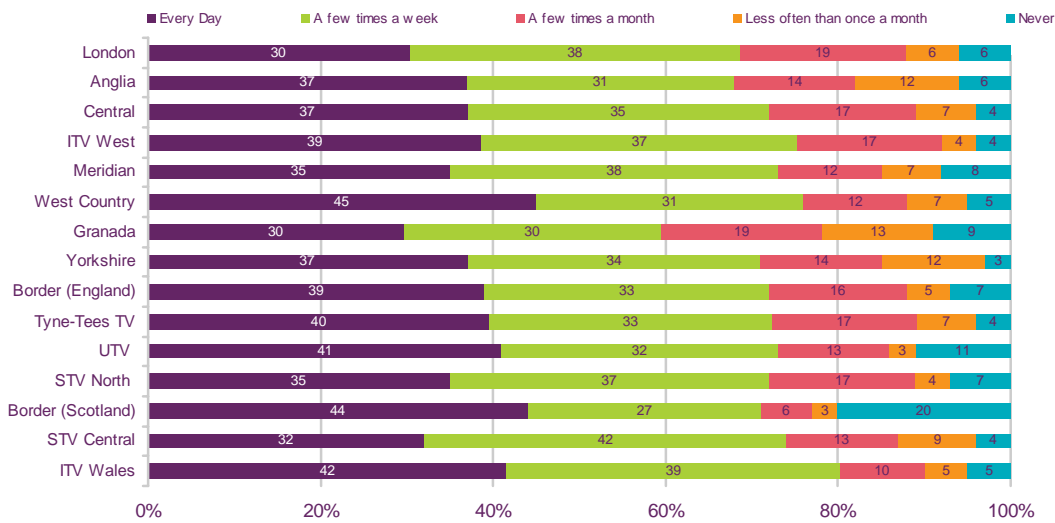


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

Close to two-fifths of respondents from most regions watch their regional weather on BBC1 on a daily basis. This rises to approximately seven in ten watching these programmes at least a few times a week. Respondents in the West Country (45%) are most likely to watch the regional weather on BBC1 on a daily basis, closely followed by Border Scotland and ITV Wales (44% and 42% respectively). These levels are notably less than the equivalent frequency of watching for regional weather on ITV/STV/UTV. In most regions more than two-fifths of respondents watched the regional weather on ITV/STV/UTV every day, rising to 64% of those in STV North and 57% of those in Border England.

Figure 28: Frequency of watching regional weather on BBC1

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on BBC1? - Weather for my (region/Wales /NI)

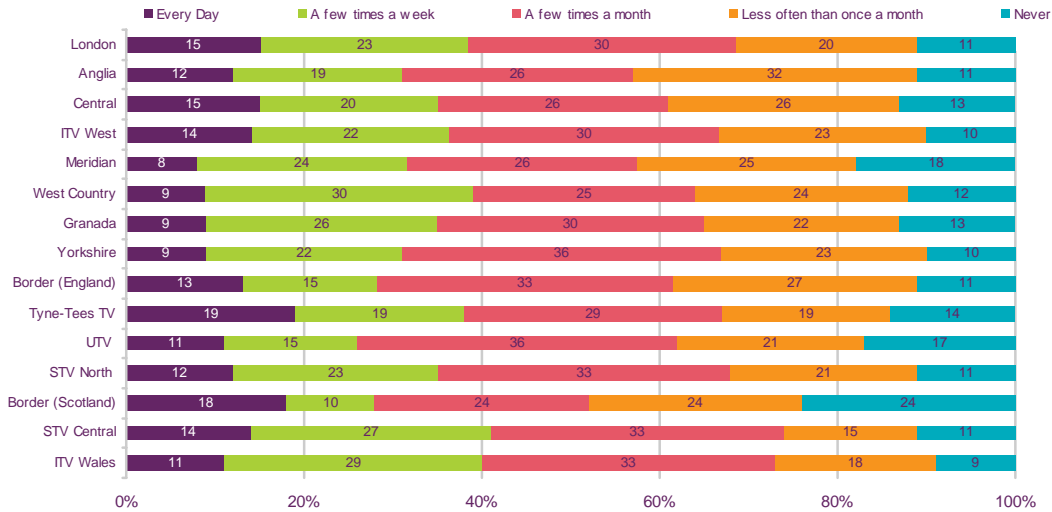


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

As for ITV/STV/UTV, the frequency of watching other regional programmes beyond news, weather and current affairs on BBC1 is lower. Typically less than one in five respondents watch such programmes on a daily basis. Nonetheless, a third or more in each region (UTV excepted) claim to watch such programmes on BBC1 a few times a week or more.

Figure 29: Frequency of watching other regional programmes on BBC1

B2 Now thinking specifically about news / information programmes, with what frequency do you watch the following types of programmes on BBC1? - Aside from news, current affairs and regional weather, other programmes about my (region/Wales /NI)



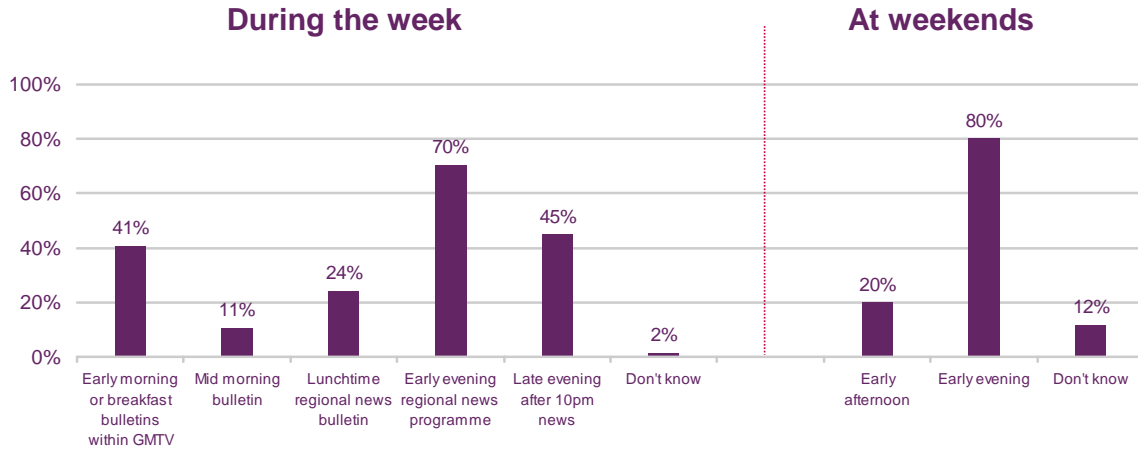
Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

4.2.3 Audience size for regional bulletins

Respondents were next asked about which regional news programmes or bulletins they usually watch, in terms of their place in the schedule, both during the week and at weekends. We begin by looking at the UK as a whole, before considering regional variations. The early evening slot attracts by far the largest audience, both during the week (70%) and at the weekend (80%). The late evening (after 10pm news) and breakfast bulletins are the next most commonly watched (45% and 41% respectively). Not surprisingly the daytime slots have a smaller audience, although a quarter watch at lunchtime during the week.

Figure 30: Proportion who usually watch regional news programmes

B3 Which of the following regional news programmes and bulletins do you usually watch....?

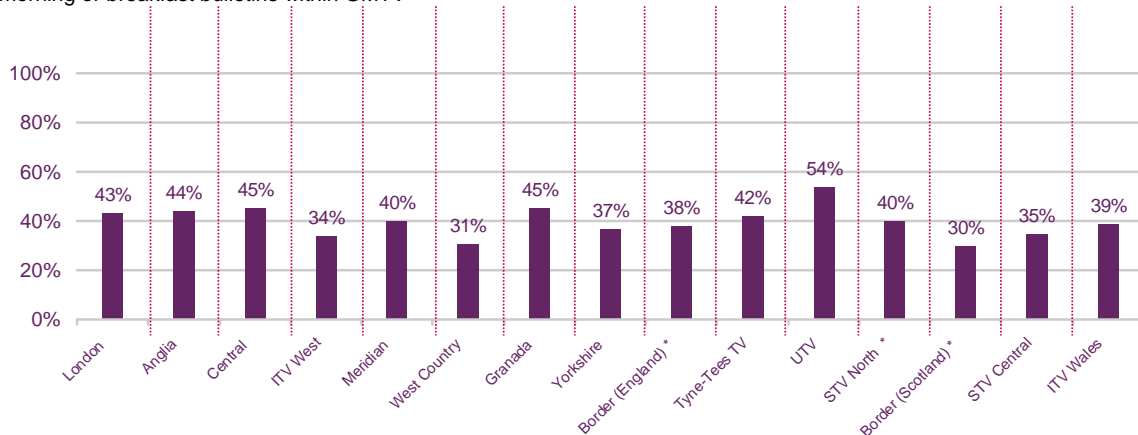


Source: Holden Pearmain
 Base: Those who watch UK news/ current affairs on ITV/STV/UTV n=2,754

Figure 31 shows the proportion in each region watching their regional early morning or breakfast bulletin on GMTV. Approximately two-fifths claim to watch these programmes. Respondents in Border Scotland and the West Country region are significantly less likely to watch (30% and 31% respectively). Respondents in UTV are the most likely to watch by some margin (54%).

Figure 31: Proportion who usually watch regional news programmes during the week – early morning/breakfast

B3 Which of the following regional news programmes and bulletins do you usually watch during the week? - Early morning or breakfast bulletins within GMTV

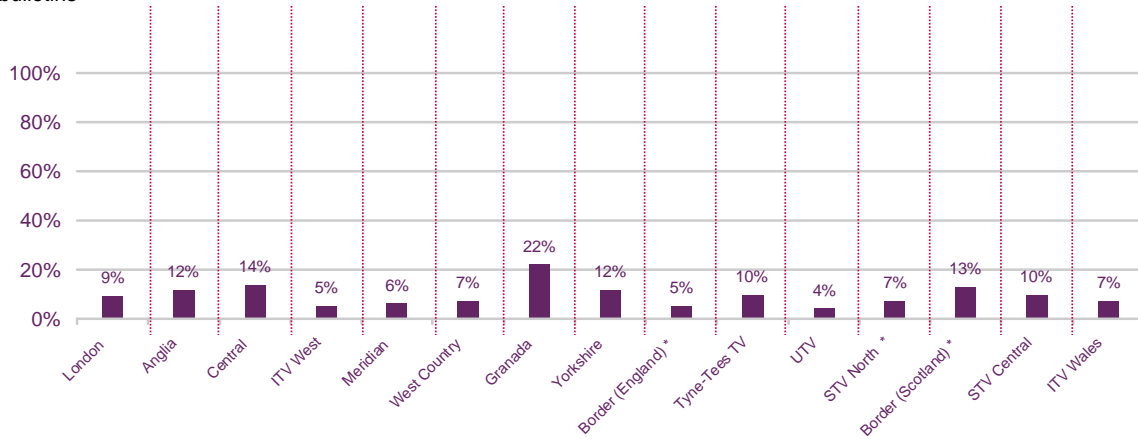


Source: Holden Pearmain
 Base: Those who watch UK news/ current affairs on ITV/STV/UTV n=2,754
 * Regional sample less than 50, indicative only

The proportion watching the mid-morning bulletin is inevitably less, allowing for work and other commitments. The proportion viewing is typically around one in ten or less, although one fifth (22%) of respondents in Granada claim they usually watch the regional weekday mid-morning bulletin on ITV1.

Figure 32: Proportion who usually watch regional news programmes during the week – mid-morning

B3 Which of the following regional news programmes and bulletins do you usually watch during the week? – Mid-morning bulletins

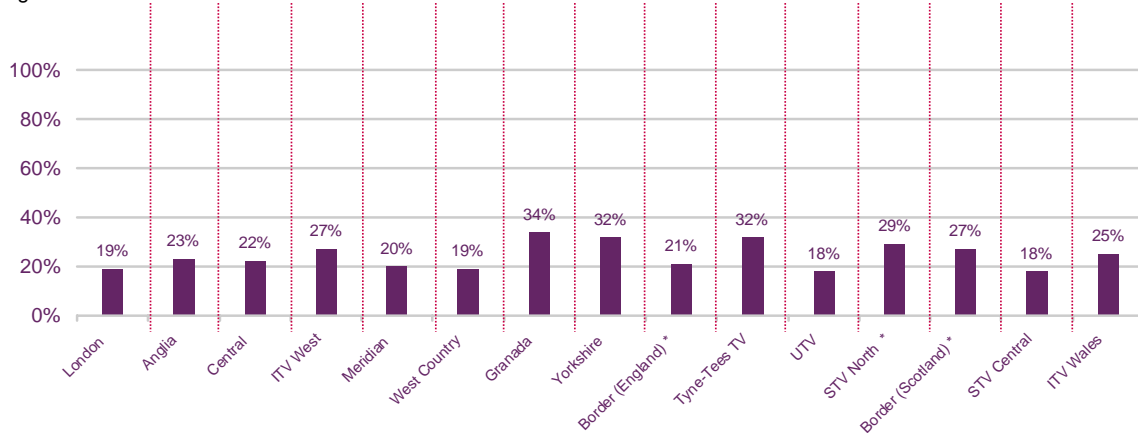


Source: Holden Pearmain
 Base: Those who watch UK news/ current affairs on ITV/STV/UTV n=2,754
 * Regional sample less than 50, indicative only

The lunchtime regional news bulletins attract more viewers than mid-morning, as might be expected, but less than at breakfast, averaging around a quarter of respondents who usually watch. This varies from 18% in STV Central and UTV, to a third of those in Granada (34%), Yorkshire and Tyne Tees (both 32%).

Figure 33: Proportion who usually watch regional news programmes during the week – lunchtime

B3 Which of the following regional news programmes and bulletins do you usually watch during the week? - Lunchtime regional news bulletin

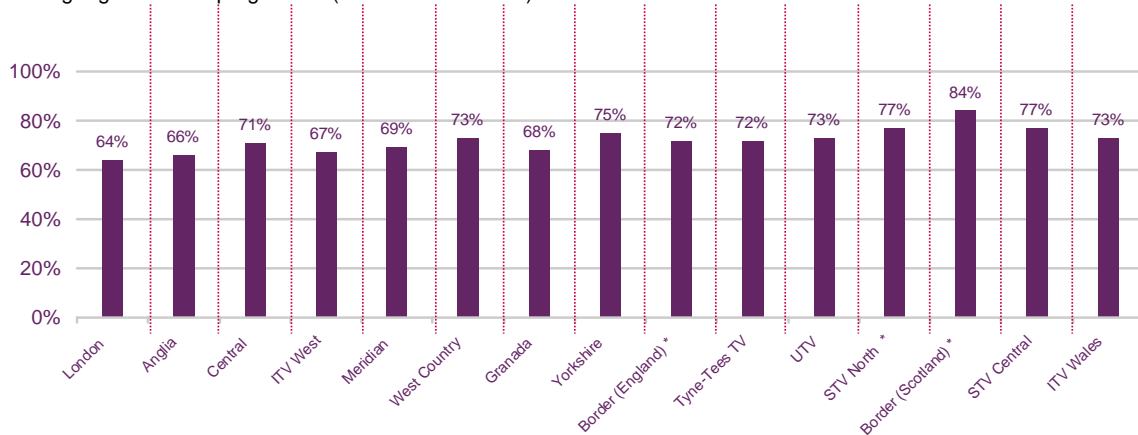


Source: Holden Pearmain
 Base: Those who watch UK news/ current affairs on ITV/STV/UTV n=2,754
 * Regional sample less than 50, indicative only

Early evening regional news programmes attract a large regular audience, reflecting the availability of viewers. No less than two thirds in any region watch these programmes (64% in London). This rises to 84% of those living in the Border Scotland region. As we have seen before, there is a more common tendency in Scotland to watch these regional programmes on STV.

Figure 34: Proportion who usually watch regional news programmes during the week – early evening

B3 Which of the following regional news programmes and bulletins do you usually watch during the week? - Early evening regional news programme (before the UK news)

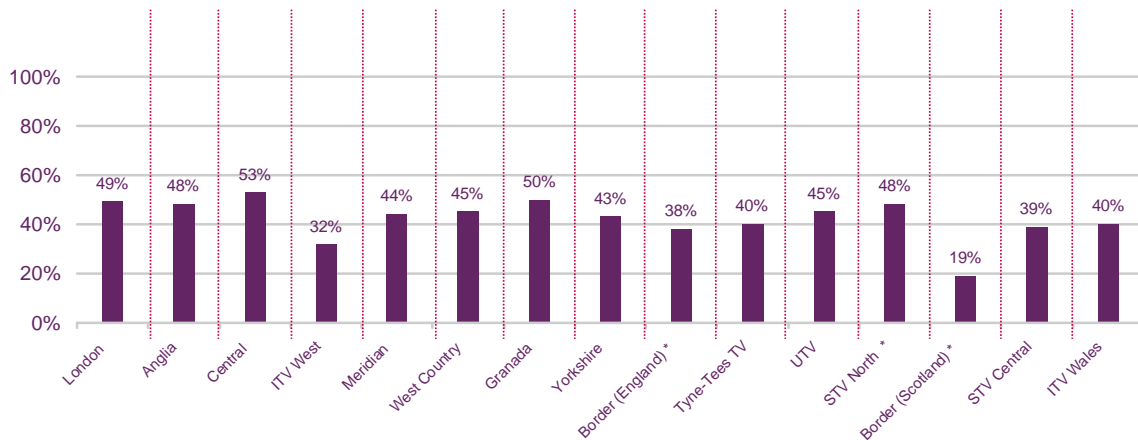


Source: Holden Pearmain
 Base: Those who watch UK news/ current affairs on ITV/STV/UTV n=2,754
 * Regional sample less than 50, indicative only

The regional news programmes after the 10pm news attract a notably smaller audience than the early evening equivalent, although slightly more than at breakfast, making this the second most important regional news slot of the day, in terms of viewer numbers. Typically two-fifths or more of respondents in each region usually watch this late programme, peaking at 53% in Central, and relatively high in London (49%), which may reflect work/life patterns in the capital. Respondents in Border Scotland are particularly unlikely to watch the regional news late in the evening, and those in ITV West are below average (19% and 32% respectively).

Figure 35: Proportion who usually watch regional news programmes during the week – late evening

B3 Which of the following regional news programmes and bulletins do you usually watch during the week? - Late evening after 10pm news

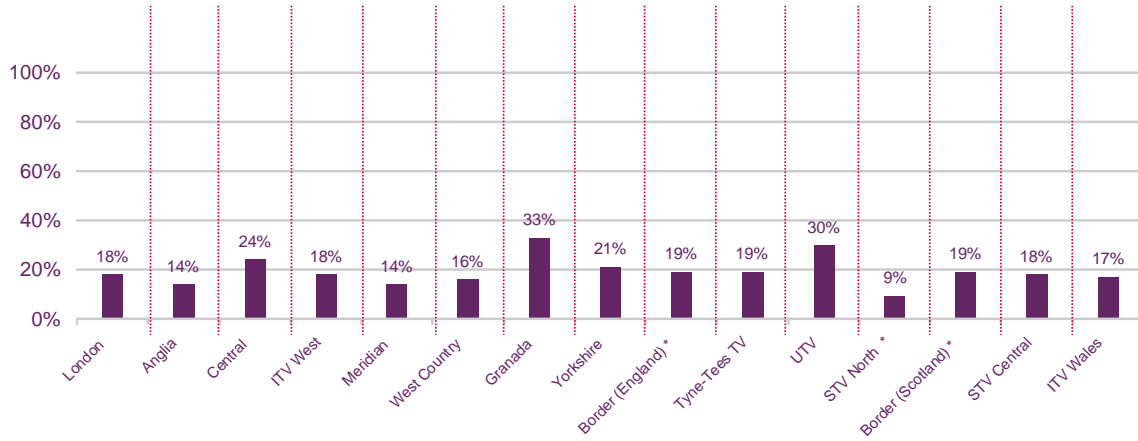


Source: Holden Pearmain
 Base: Those who watch UK news/ current affairs on ITV/STV/UTV n=2,754
 * Regional sample less than 50, indicative only

The early afternoon regional news slot at the weekends typically attracts less than a fifth of respondents, although this audience is much higher in Granada (33%) and UTV (30%). This slot is rarely watched in STV North (9%).

Figure 36: Proportion who usually watch regional news programmes at the weekend – early afternoon

B4 Which of the following ITV news programmes do you usually watch at the weekend? - Early afternoon

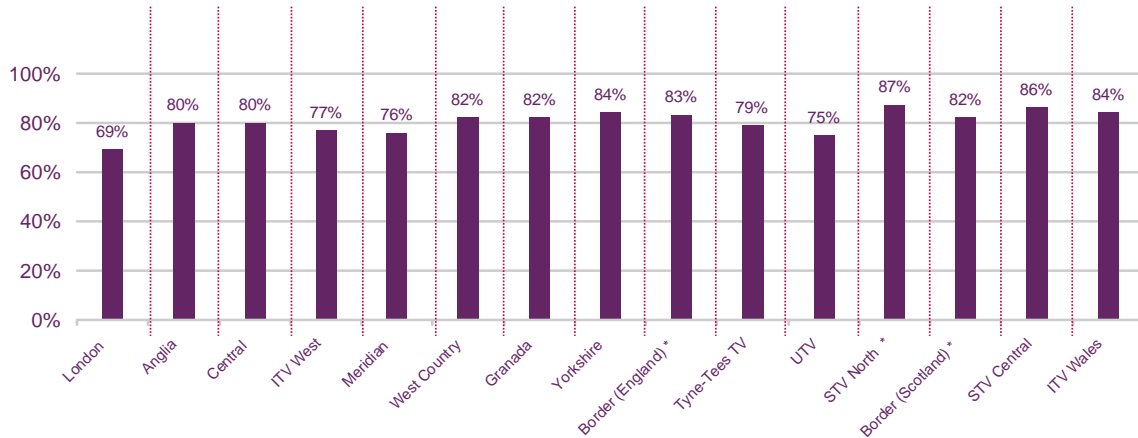


Source: Holden Pearmain
 Base: Those who watch UK news/ current affairs on ITV/STV/UTV n=2,754
 * Regional sample less than 50, indicative only

The early evening regional news at the weekend attracts a broadly similarly sized audience to the equivalent weekday programme, although tending to be slightly higher. In most regions at least four-fifths of respondents claim to watch this weekend programme, peaking in STV Central and North (87% and 86% respectively). Audience size is lowest again in London (69%), but in viewer number terms, the early evening regional news at the weekend appears to be (marginally) the most important.

Figure 37: Proportion who usually watch regional news programmes at the weekend – early evening

B4 Which of the following ITV news programmes do you usually watch at the weekend? - Early evening



Source: Holden Pearmain
 Base: Those who watch UK news/ current affairs on ITV/STV/UTV n=2,754
 * Regional sample less than 50, indicative only

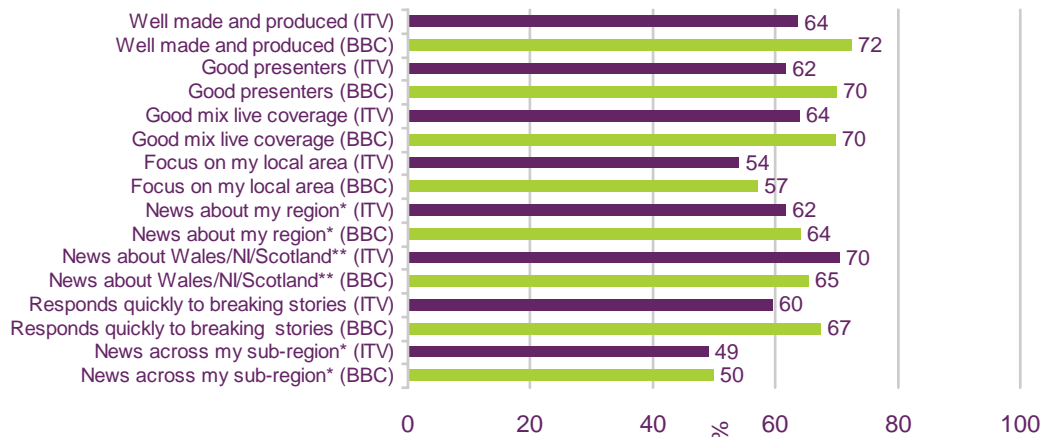
5 SATISFACTION WITH CURRENT PROVISION

All respondents were asked to rate their satisfaction with a number of aspects regarding how regional news is shown on both ITV/STV/UTV and the BBC. Ratings were given using a scale from 1 to 5, where 1 means ‘very dissatisfied’ and 5 means ‘very satisfied’.

We begin by comparing the proportions very satisfied with each PSB on each dimension. Around a fifth of respondents across the UK are very satisfied with most features of ITV/STV/UTV’s regional news. On these features, relating to the production quality, the presenters, the mix of coverage and the speed of response to breaking stories, the BBC has a small but significant advantage, typically rated very satisfied by a quarter of the UK population. However both channels are rated less favourably for sub-regional coverage in particular (both 12% very satisfied) but also the local focus. On these two dimensions, and the regional coverage the two PSBs are regarded equally.

Figure 38: Satisfaction with ITV/STV/UTV and BBC regional news – Summary

C3 How satisfied or dissatisfied are you with the way in which the regional news is shown on...? (net satisfied 4-5/5)



Source: Holden Pearmain

Base: Total sample size n=3,706, minimum sample in any region n=200

* England and Scotland only ** Wales/NI/Scotland only

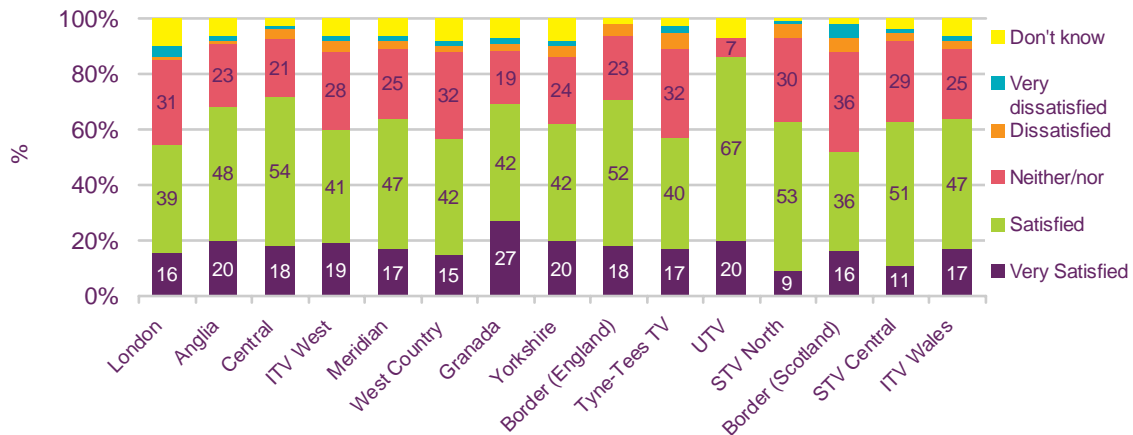
5.1 Well made and produced

Respondents were first asked to assess how well made and produced regional news is. Figure 39 shows the results for ITV/STV/UTV. There is a high level of satisfaction with

the current output, with around three-fifths of respondents in each area stating they are satisfied or very satisfied (top 2 box score) with how ITV/STV/UTV makes and produces its regional news. Respondents in London are the most critical, but even there 55% give a top 2 box score. In most regions, just under a fifth say they are very satisfied with how well made and produced ITV/STV/UTV regional news is. Respondents in Granada are particularly positive (27% very satisfied, whereas respondents in STV are least likely to be very satisfied (9%). There is very little dissatisfaction with the output. Even in London fewer are positive because they cannot give a rating (ITV regional news is watched less often in this region) or are neutral, rather than because they are dissatisfied.

Figure 39: Satisfaction with ITV/STV/UTV regional news – Well made and produced

C3A How satisfied or dissatisfied are you with the way in which the regional news is shown on ITV/STV/UTV? - Well made and produced

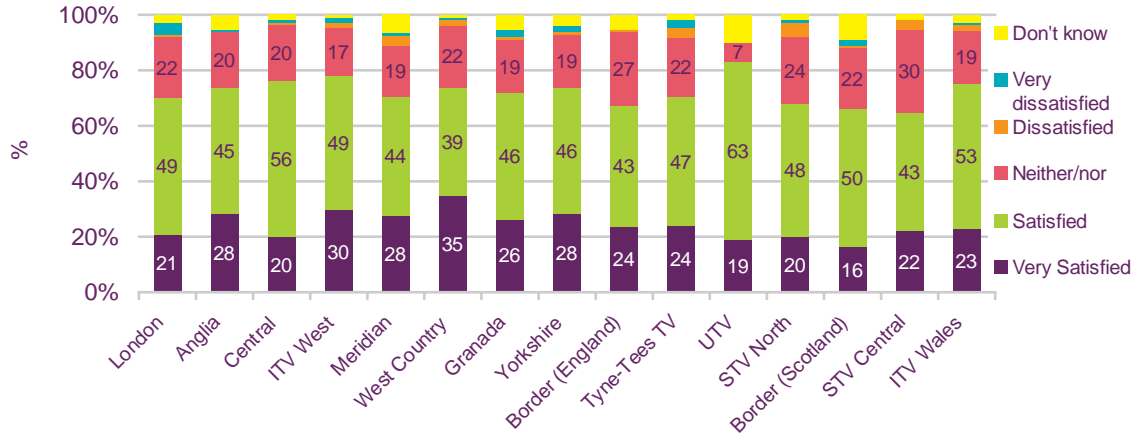


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

The pattern of response with regard to regional news being well made and produced is very similar for the BBC, although ratings tend to be higher. Thus over a fifth of respondents in most regions are very satisfied with the output, rising to a quarter in several regions, and as high as 35% in West Country. No region stand out as being particularly less satisfied, although as a group the Scottish regions tend to be slightly less positive. As for ITV/STV/UTV, dissatisfaction with the BBC regional news in terms how well it is made and produced is negligible.

Figure 40: Satisfaction with BBC regional news – Well made and produced

C3A How satisfied or dissatisfied are you with the way in which the regional news is shown on BBC? - Well made and produced



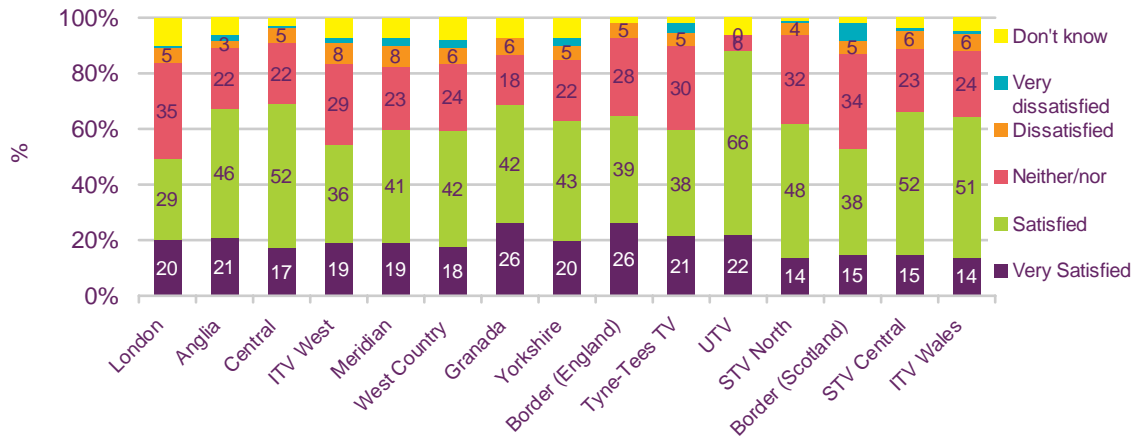
Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

5.2 Good presenters

The ratings ITV/STV/UTV achieves for having good presenters for its regional news are very similar to those for being well made and produced. Thus around a fifth of respondents in each region are very satisfied with the presenters, with no real outliers, although the Scottish regions as a whole are marginally less positive. Here too respondents in Granada are most positive, with 26% very satisfied, matched by Border England. Overall around two-thirds of respondents are satisfied or very satisfied with the presenters, although as before, London respondents are less positive (49%). Respondents in UTV are notably satisfied overall, nearly nine in ten being satisfied or very satisfied. There is very little dissatisfaction with the presenters of ITV/STV/UTV’s regional news.

Figure 41: Satisfaction with ITV/STV/UTV regional news – Good presenters

C3A How satisfied or dissatisfied are you with the way in which the regional news is shown on ITV/STV/UTV? – Good presenters



Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

Ratings for the BBC's regional news presenters are similar to ITV/STV/UTV's ratings, but here too tend to be slightly more positive. Thus over a fifth of respondents in most regions are very satisfied with the output, rising to a quarter in several regions, and as high as 34% in West Country. STV Central respondents are less positive (12% very satisfied, 62% satisfied overall). The top 2 box score across the Scottish regions is under average. However, dissatisfaction with the presenters of BBC regional news is minimal.

Figure 42: Satisfaction with BBC regional news – Good presenters

C3A How satisfied or dissatisfied are you with the way in which the regional news is shown on BBC? – Good presenters



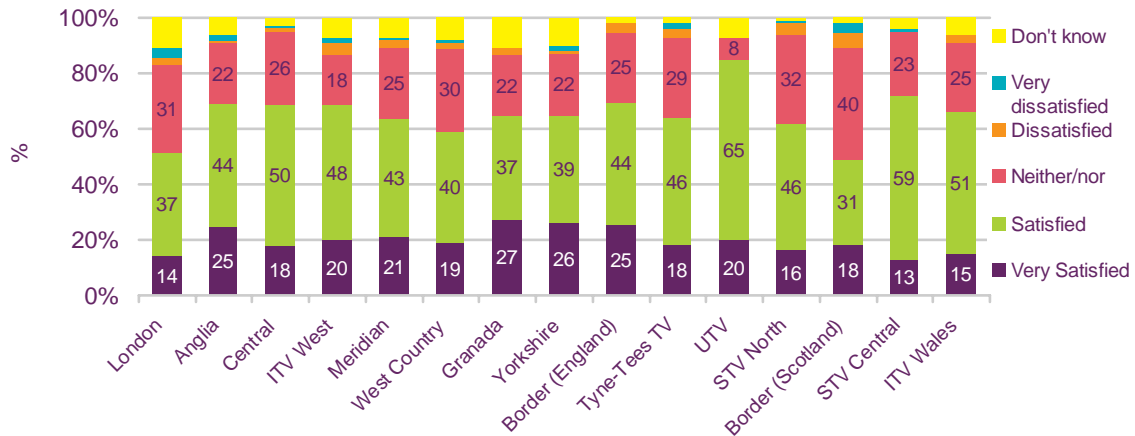
Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

5.3 Good mix of live coverage, filmed reports, studio based items

As on other aspects, around one in five respondents are very satisfied with the mix of live coverage, filmed reports and studio based items included within ITV/STV/UTV’s regional news. Granada, Yorkshire, Border England and Anglia achieve the highest levels of satisfaction, whereas STV Central, London and ITV Wales are worst rated in this respect. Overall satisfaction (i.e. top 2 box) is notably lower in Border Scotland and London (49% and 51% respectively). Nonetheless, actual dissatisfaction remains rare.

Figure 43: Satisfaction with ITV/STV/UTV regional news – Good mix of live coverage, filmed reports, studio based items

C3A How satisfied or dissatisfied are you with the way in which the regional news is shown on ITV/STV/UTV? – Good mix of live coverage, filmed reports, studio based items

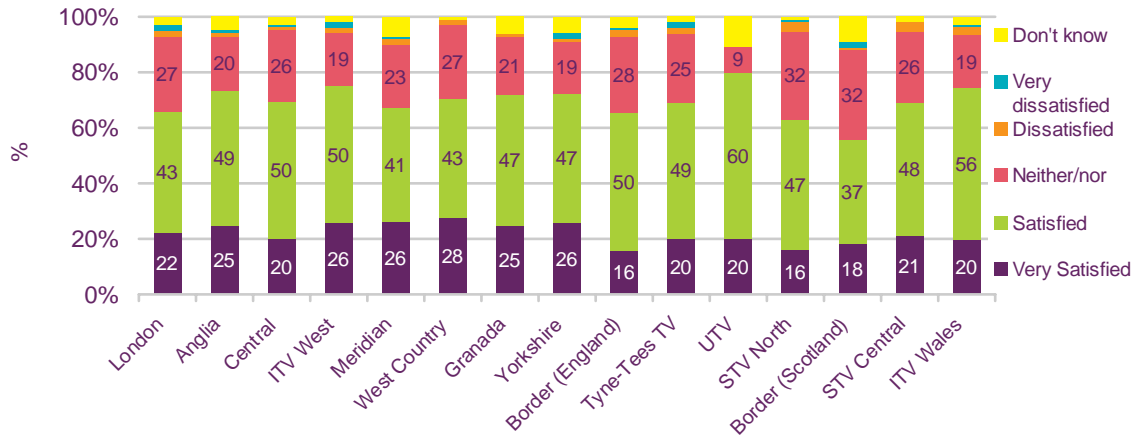


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

As for other dimensions, the BBC ratings for the mix of coverage in regional news are similar to those for ITV/STV/UTV, but slightly higher. However, there is less distinction between the regions in terms of ratings achieved., although respondents in Border Scotland are again less satisfied overall (55%). Here too dissatisfaction is very rare.

Figure 44: Satisfaction with BBC regional news – Good mix of live coverage, filmed reports, studio based items

C3A How satisfied or dissatisfied are you with the way in which the regional news is shown on BBC? – Good mix of live coverage, filmed reports, studio based items



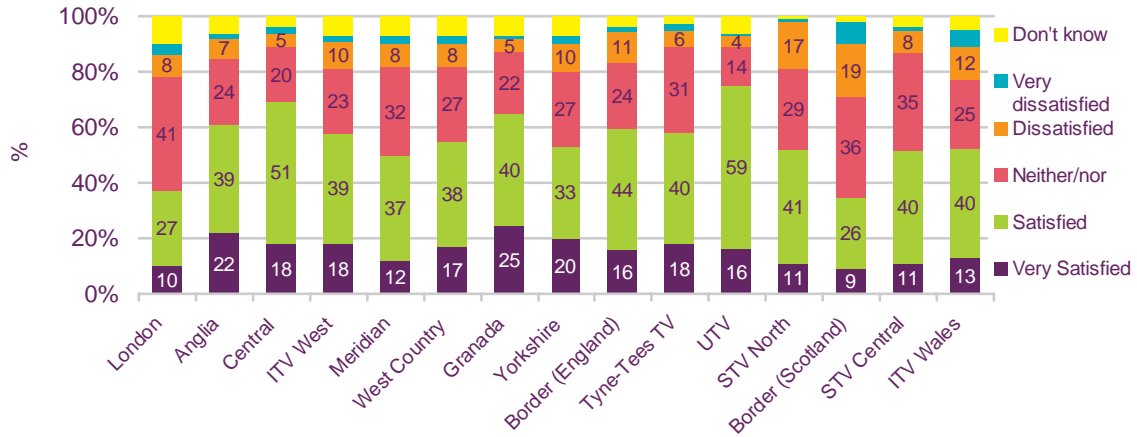
Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

5.4 Focus on my local area

Satisfaction with the focus ITV/STV/UTV’s regional news gives to the local area is broadly in line with other ratings, albeit slightly less positive. In several areas, only around one in ten respondents are very satisfied with the local focus, including all Scottish regions (STV North, Border Scotland, STV Central, London, Meridian and ITV Wales). Granada respondents are again most likely to be very satisfied (25%). Top 2 box scores are also down compared to other aspects of ITV/STV/UTV’s regional news, in particular in Border Scotland and London, where only 35% and 37% respectively are satisfied at all. There are also noticeable levels of dissatisfaction with local focus (relative to other aspects), particularly in Scotland.

Figure 45: Satisfaction with ITV/STV/UTV regional news – Focus on local area

C3A How satisfied or dissatisfied are you with the way in which the regional news is shown on ITV/STV/UTV? – Focus on local area

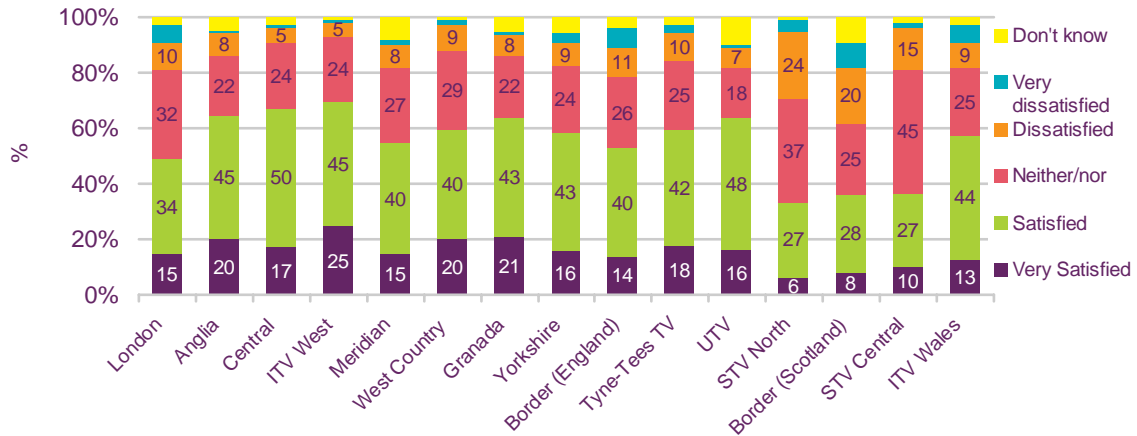


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

The ratings for the local focus of the BBC’s regional news are similar to that for ITV/STV/UTV. These ratings are also generally lower than those for the BBC’s regional news on other dimensions, in much the same way they were for ITV/STV/UTV. Thus the proportion very satisfied seldom goes above 20%, reaching a maximum of 25% in ITV West.

Figure 46: Satisfaction with BBC regional news – Focus on local area

C3A How satisfied or dissatisfied are you with the way in which the regional news is shown on BBC? – Focus on local area



Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

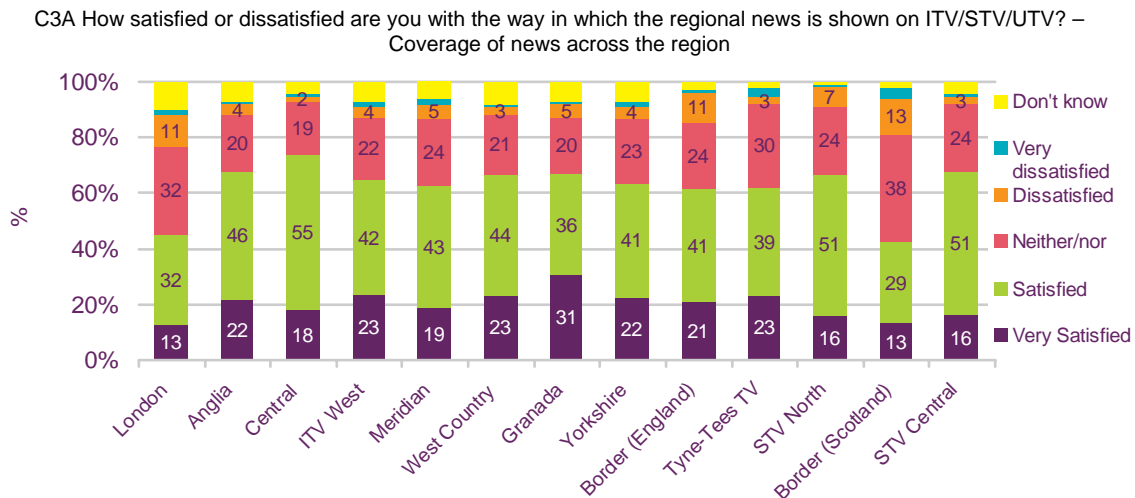
As for STV, Scottish ratings for the BBC’s local focus are below average, and in fact are even lower for the BBC. The BBC’s regional news does not achieve a top 2 box score of

40% in any of the Scottish regions. Dissatisfaction in these regions is also relatively high, reaching 24% in STV North, but exists in all regions, as it does for STV. Overall satisfaction is also low in London.

5.5 Coverage of news across the region

Regional coverage, as opposed to local coverage, engenders greater satisfaction, with the proportion very satisfied returning to around the one fifth level in most regions, in line with other dimensions. Once again respondents in Granada are the most likely to be very satisfied (31%). Nonetheless, relatively small proportions of those in London give a top 2 box score (45%). Dissatisfaction (bottom 2 boxes) is also relatively common in this region (16%), although seen in most regions albeit at a low level. Respondents in Border Scotland have the highest levels of dissatisfaction, with 17% dissatisfied with the coverage, and only 42% satisfied. In the other two Scottish regions, STV Central and STV North, 67% are satisfied.

Figure 47: Satisfaction with ITV/STV/UTV regional news – Coverage of news across the region



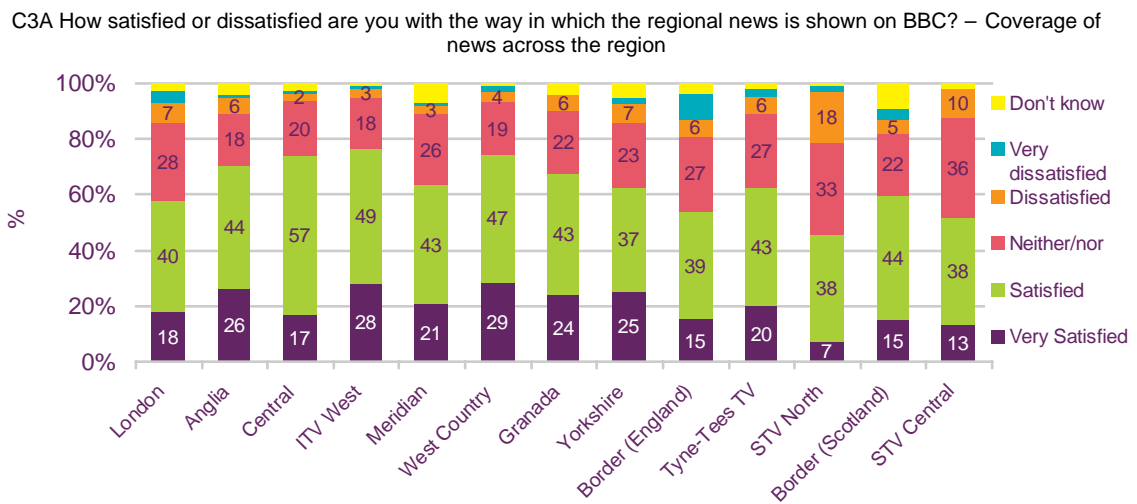
Source: Holden Pearmain
 Base: Total sample size n=3,248, minimum sample in any region n=200
 Not asked in NI or Wales

Ratings for the regional coverage of the BBC’s regional news are broadly in line with ITV/STV/UTV’s, and marginally better than for its own local coverage. There is a low level of dissatisfaction in most regions. Londoners are less critical of the BBC in this

respect. Broadly speaking, ratings tend to be more positive for the BBC in England, and more positive (relatively) for STV in Scotland.

With regard to the BBC’s regional news coverage in Scotland, respondents in STV North are the most critical. A fifth of them are dissatisfied, compared to one in ten in STV Central and Border Scotland. Respondents in the latter are slightly more satisfied with the coverage than elsewhere in Scotland.

Figure 48: Satisfaction with BBC regional news – Coverage of news across the region

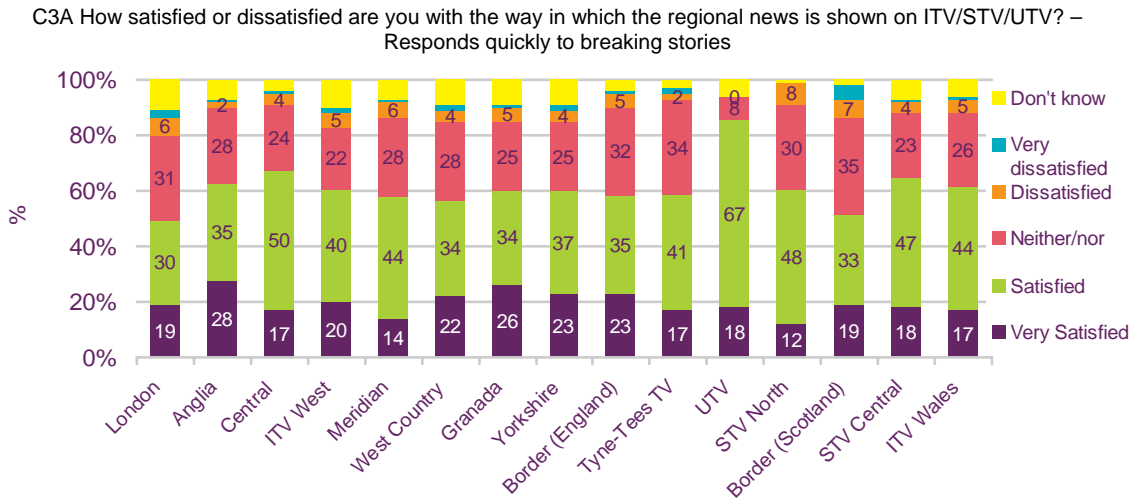


Source: Holden Pearmain
 Base: Total sample size n=3,248, minimum sample in any region n=200
 Not asked in NI or Wales

5.6 Responds quickly to breaking stories

There is a less consistent pattern to the ratings of ITV/STV/UTV’s regional news for its quick response to breaking stories. Most regions achieve a rating of around one fifth very satisfied, with three-fifths giving a top 2 box score. Nonetheless, the ratings in London and Border Scotland are again down on the average for the top 2 box score, and the latter attracts the largest degree of dissatisfaction (12%), although this exists to a small degree in all regions. UTV continues to be notably positive.

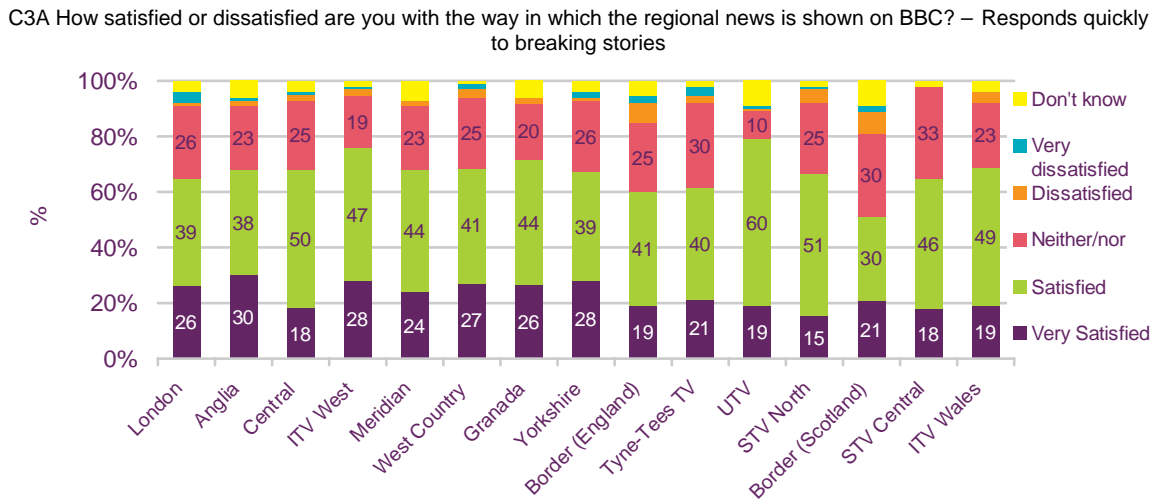
Figure 49: Satisfaction with ITV/STV/UTV regional news – Responds quickly to breaking stories



Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

Ratings for the BBC’s response to breaking stories within its regional news are generally more favourable than for ITV/STV/UTV. In all but one region (STV North) at least a fifth of respondents are very satisfied, with much of England achieving 25% or more on this measure. The greatest dissatisfaction is seen in the two Border regions, both Scotland and England, where 10% of respondents are dissatisfied with the speed of breaking news.

Figure 50: Satisfaction with BBC regional news – Responds quickly to breaking stories

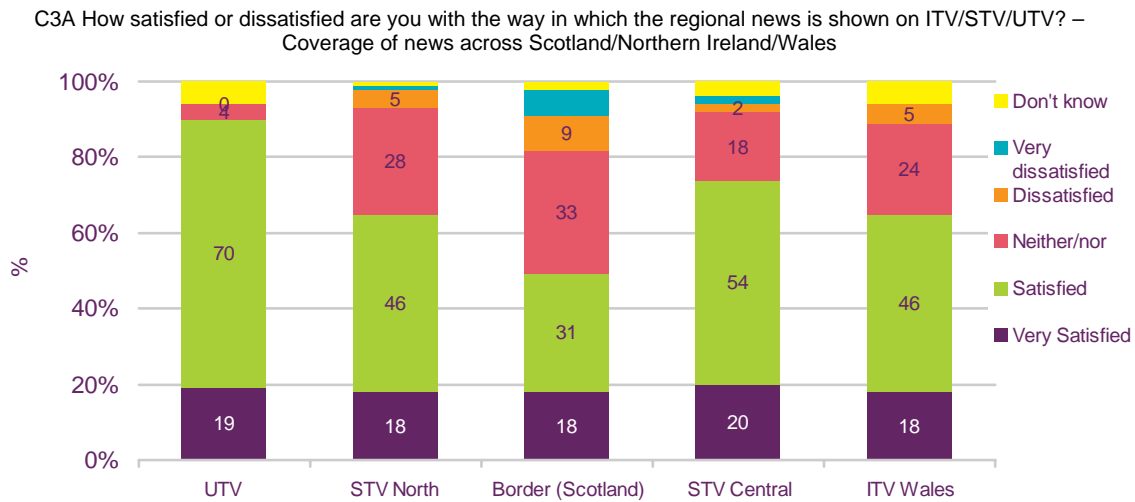


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200

5.7 Coverage of news across Scotland/Northern Ireland/Wales

Around a fifth of respondents in Scotland, Northern Ireland and Wales are very satisfied with ITV/STV/UTV’s national coverage. However, there are notably higher levels of dissatisfaction in Border Scotland (16%).

Figure 51: Satisfaction with ITV/STV/UTV regional news – Coverage of news across Scotland/Northern Ireland/Wales

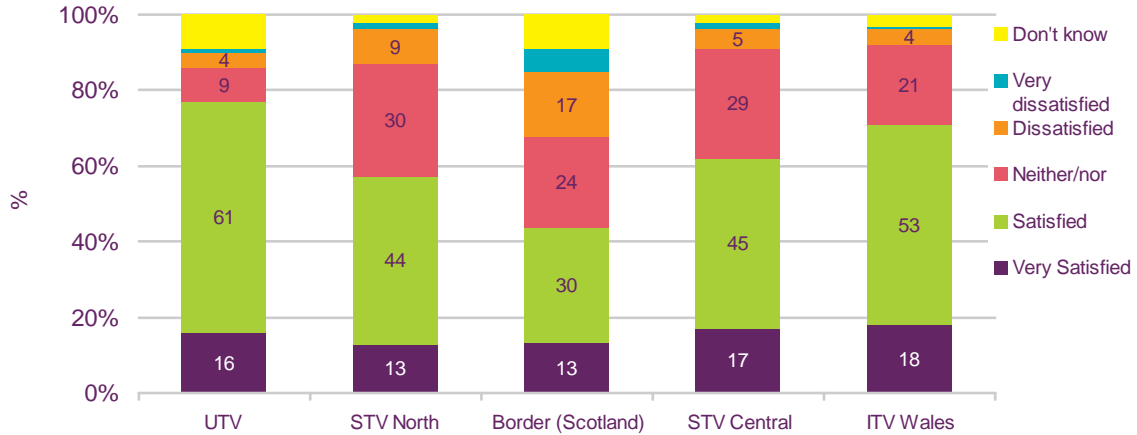


Source: Holden Pearmain
 Base: Total sample size n=1,082, minimum sample in any region n=200
 Not asked in England

A broadly similar pattern is evident for the BBC’s coverage of news in Scotland, Northern Ireland and Wales, albeit satisfaction levels are slightly lower.

Figure 52: Satisfaction with BBC regional news – Coverage of news across Scotland/Northern Ireland/Wales

C3A How satisfied or dissatisfied are you with the way in which the regional news is shown on BBC? – Coverage of news across Scotland/Northern Ireland/Wales

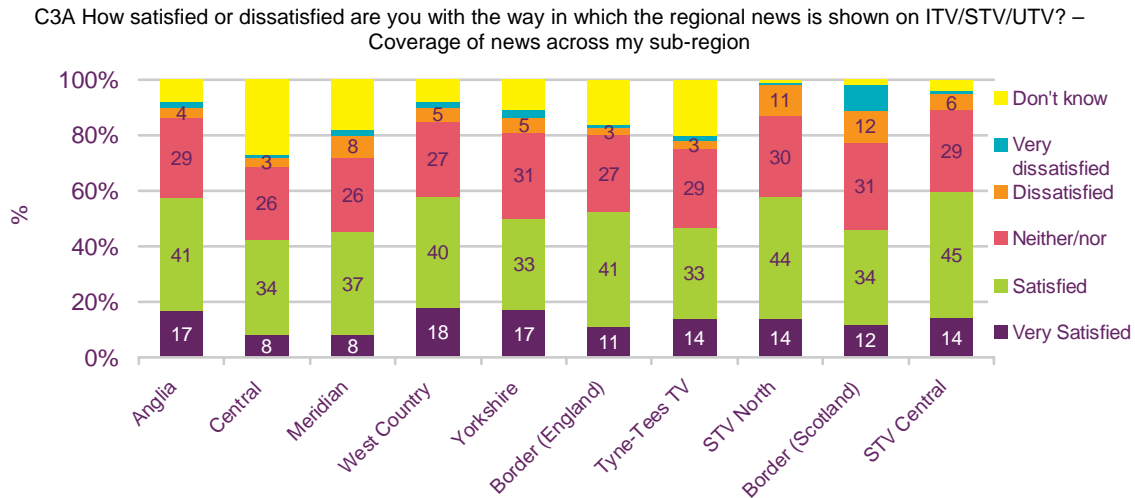


Source: Holden Pearmain
 Base: Total sample size n=1,082, minimum sample in any region n=200
 Not asked in England

5.8 Coverage of news across my sub-region

In regions where relevant, respondents were asked to rate their satisfaction with the coverage of news across their sub-region. There is less satisfaction with ITV/STV/UTV’s coverage across sub-regions than there is for the channel’s coverage of either regional or local news. In all regions less than a fifth of respondents are very satisfied with sub-regional coverage, dropping below one in ten in both Central and Meridian. However, in England there is relatively dissatisfaction with the coverage, positive ratings depressed by relatively large proportion that cannot answer. However, in the three Scottish TV regions there is dissatisfaction, notably in Border Scotland where it runs at 21%.

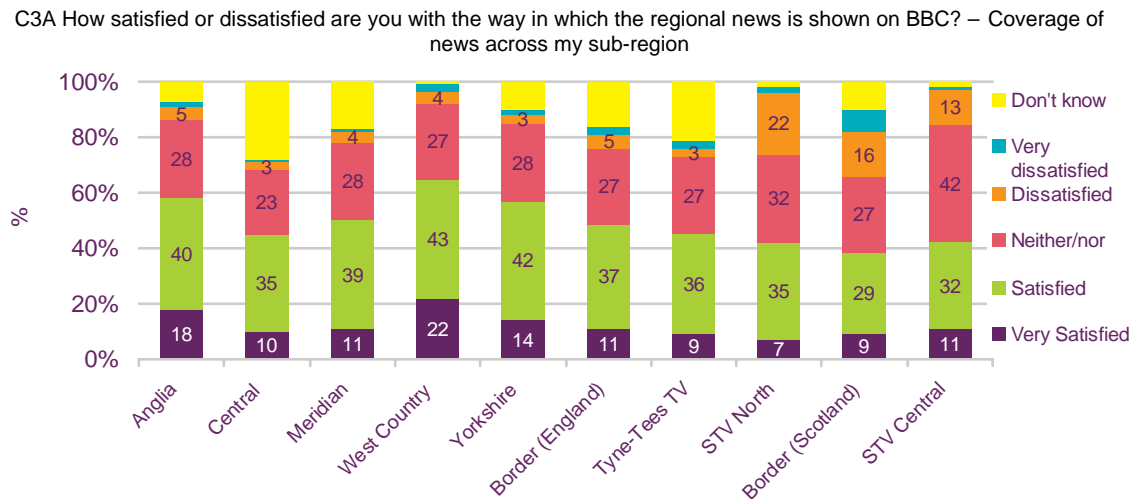
Figure 53: Satisfaction with ITV/STV/UTV regional news – Coverage of news across my sub-region



Source: Holden Pearmain
 Base: Total sample size n=2,304, minimum sample in any region n=200
 Asked only in regions with sub-regions

Ratings for the BBC’s coverage of sub-regional news follow a similar pattern. Positive ratings in England appear to be suppressed by a significant proportion in each region that cannot answer. However, in Scotland there is evidence of real dissatisfaction with the sub-regional coverage in all three regions, amounting to a quarter of those in Border Scotland and STV North.

Figure 54: Satisfaction with BBC regional news – Coverage of news across my sub-region



Source: Holden Pearmain
 Base: Total sample size n=2,304, minimum sample in any region n=200
 Asked only in regions with sub-region

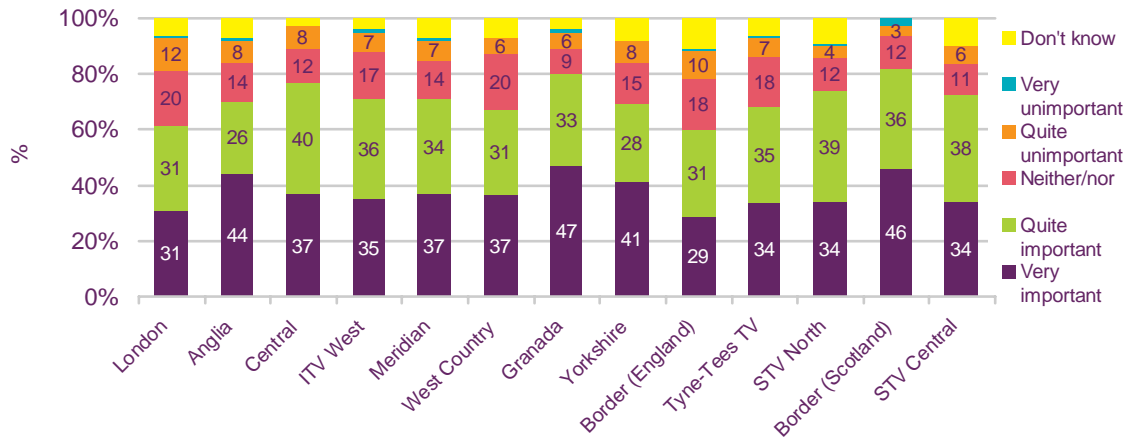
6 IMPORTANCE OF NEWS DELIVERY

6.1 Range of providers

All respondents were asked how important they thought it was that news about their region was shown on more than one of the main TV channels. Importance was gauged on a five point scale ranging from ‘very important’ to ‘very unimportant’. Figure 55 shows that there is a very strong belief that regional news should be on more than one main channel. At least a third or respondents in all regions think this is very important, reaching as high as around half of all respondents in some regions (Border Scotland, and Granada). Regional coverage is seen as least important in Border England and London.

Figure 55: Importance of showing regional news on more than one main TV channel

C5A How important, if at all, do you think it is that news about your region is shown on more than one of the main TV channels?



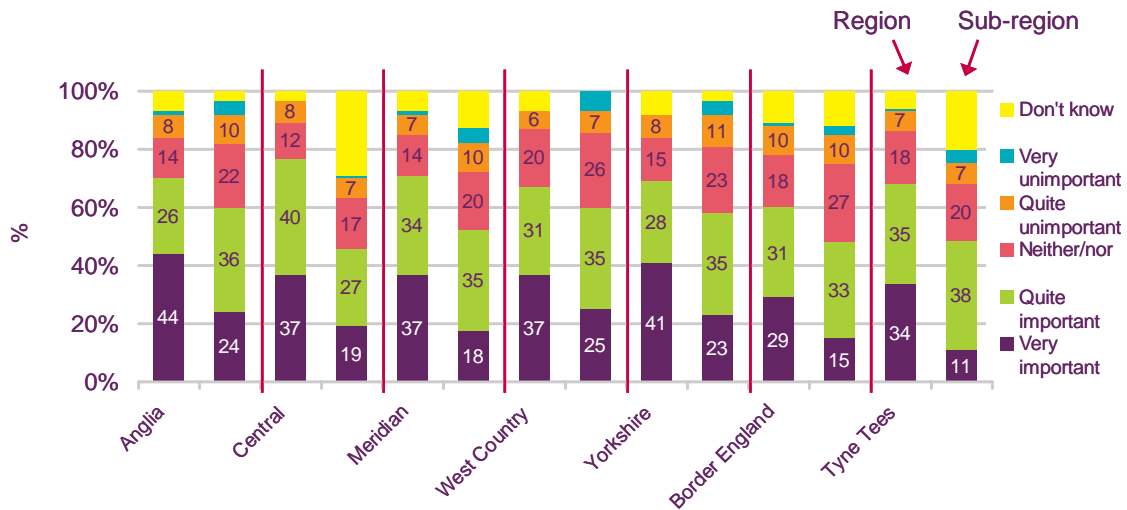
Source: Holden Pearmain
 Base: Total sample size n=3,248, minimum sample in any region n=200
 Not asked in NI or Wales

Where relevant, respondents were also asked about the importance of showing sub-regional news on more than one of the main TV channels. There is a clear trend for sub-regional news to be given less importance than regional news. In most regions approximately twice as many say that it is very important to have regional news on more than one channel than say the same for sub-regional news. In Tyne Tees this divergence is even more marked, although to some extent this may be affected by the proportion in this region that cannot answer. It is in the West Country region where sub-

regional news is given most importance relative to regional news, although it is still deemed more important for the latter to be more widely available. The number of sub-regions within this TV region is likely to have impacted on the importance given to sub-regional news in this area, where it may be more of an issue. Views in the West Country region are, however, polarised to some extent as 13% claim it is not important for sub-regional news to be on more than one channel. When considering those describing each scenario as very or quite important there tends to be less distinction between regional and sub-regional news, although the former is still deemed more important. This is particularly true in Central.

Figure 56: Importance of showing regional/sub-regional news on more than one main TV channel

C5A How important, if at all, do you think it is that news about your region/sub-region is shown on more than one of the main TV channels?

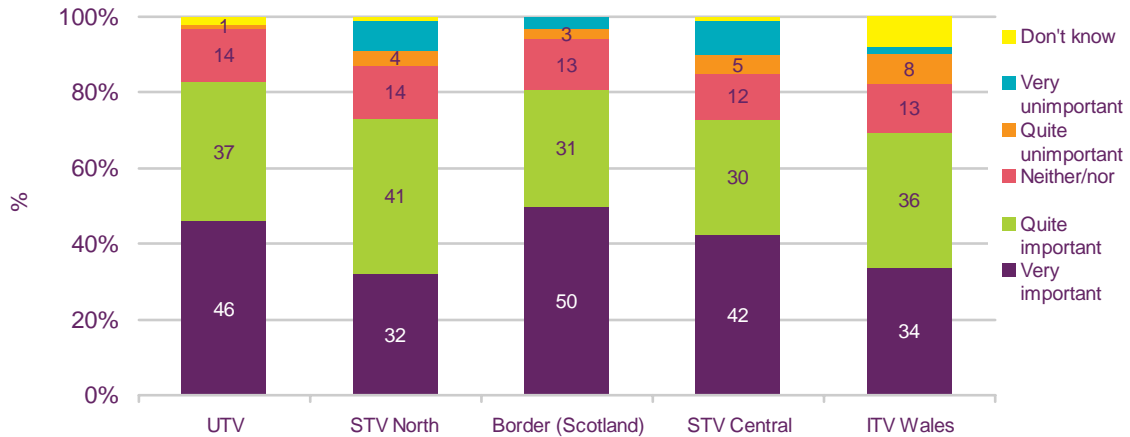


Source: Holden Pearmain
 Base: Total sample size n=2,304, minimum sample in any region n=200
 Asked only in regions with sub-regions

Those in Scotland, Wales and NI were also asked to rate the importance of showing national news on more than one channel. It is relatively less important to those in STV North and ITV Wales for their national news to be shown on more than one channel, about a third in each saying this is very important.

Figure 57: Importance of showing national news on more than one main TV channel (Scotland/Northern Ireland/Wales)

C5A How important, if at all, do you think it is that news about Wales/NI/Scotland is shown on more than one of the main TV channels?



Source: Holden Pearmain
 Base: Total sample size n=1,082, minimum sample in any region n=200
 Not asked in England

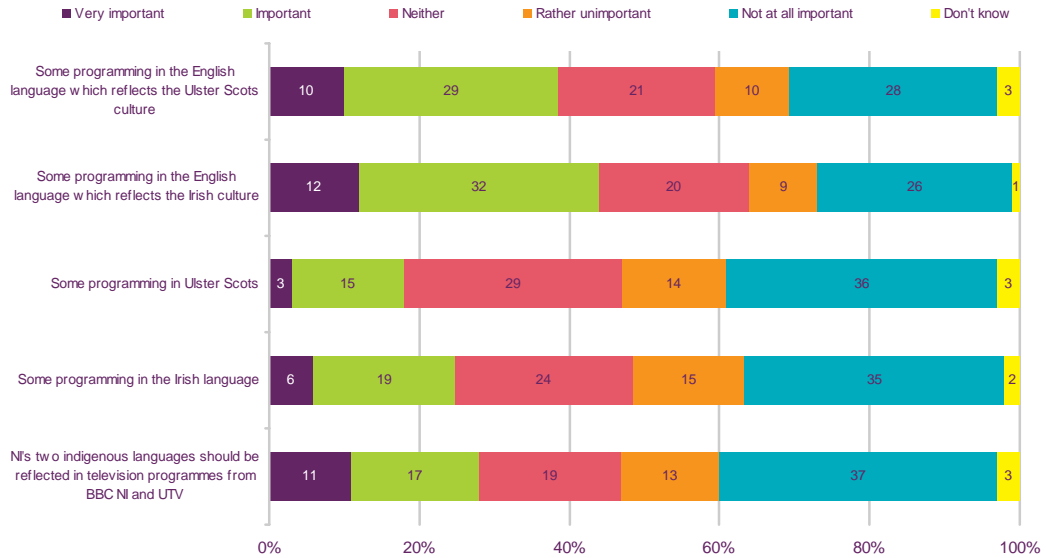
It is interesting to note that respondents in Scotland make very little distinction between the importance of having national news on more than one TV channel and having regional news on more than one channel. Respondents in Border Scotland place a little more importance in having either national or regional news on more than one channel. Just over one in ten respondents in the two STV regions do not think it is important to have the national news on more than one channel.

6.2 Importance of cultural programming – Northern Ireland

Respondents in Northern Ireland were asked specific questions to ascertain the importance of Irish culture and the Irish language to regional programming. Again this was asked on a five point scale, ranging from ‘very important’ to ‘not at all important’. Findings are summarised in Figure 58. It is fair to say that opinions are divided on these issues. Broadly equal proportions place importance on programming in the English language reflecting either Ulster Scots or Irish culture. However, whilst there is a neutral balance of opinion for Ulster Scots culture, slightly more place importance on reflecting Irish culture than see it as unimportant (44% compared with 39%). Moreover, whilst there is a significant minority who value programming in each of the Ulster Scots or Irish languages, there is a substantial balance of opinion against such programming.

Figure 58: Importance of cultural programming – Northern Ireland

Q11/3 In your opinion, how important is it that each of the following is available on television in NI?



Source: Holden Pearmain
 Base: Total NI sample size n=233

6.3 Importance analysis

Two analyses were used to measure the relative importance of different elements of regional news – Chip Allocation and Max Diff. Different elements of news were included depending on whether regional or sub-regional news was available; hence the options and patterns of responses differ by region.

In the chip allocation exercise respondents are presented with all of the available statements, and asked to allocate 15 chips across the statements based on how much importance they place on each. They may place all chips on one attribute, or spread all chips evenly, so long as the total number of chips placed is no more or less than 15.

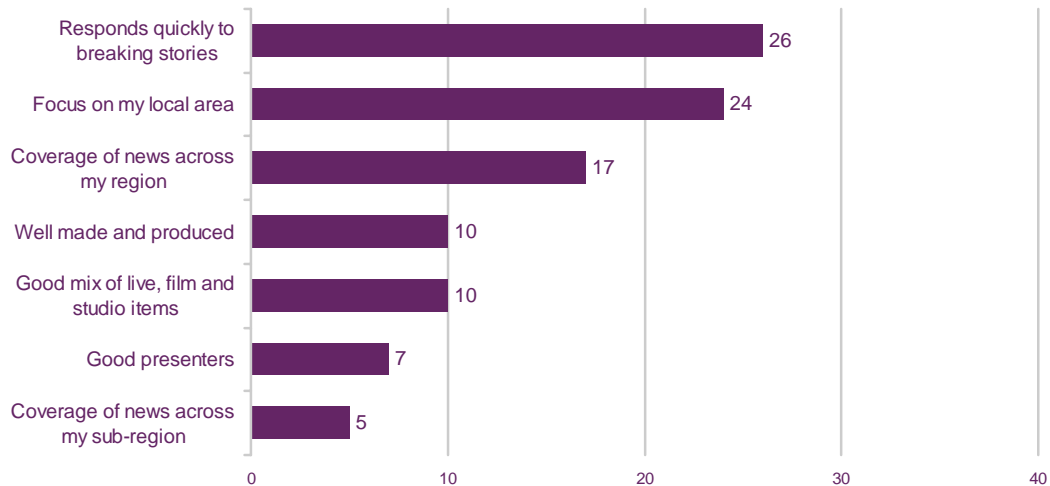
In Max Diff, the same statements are used as for the chip allocation exercise. However, for this exercise each respondent is shown up to eight scenarios, each with a sub-set of the statements. For each scenario, they are asked to nominate the least and most important statements from this sub set.

Chip allocation gives a good gauge of how people rate the importance of the elements when they are not forced to choose or trade off the different elements. The Max Diff analysis is much more differentiating and provides a good indication of how people would prioritise different elements when they are forced to choose, hence we have concentrated on this approach in this report. More detail on the two exercises can be found in Appendix C.

Overall, respondents appear to place a high level of importance across all statements, with results from the chip allocation coming out quite flat, with little distinctions between statements. This is a result of respondents placing chips evenly across all statements available. However when forced to select a least and most important statement in the Max Diff exercise, some differentiation is noticed. Aggregated UK level analysis is difficult, as statements differed by nation and region. However at an overall level, the statements that consistently score highly are “*Responds quickly to breaking stories*” and “*focus on my local area*”.

Figure 59 shows Max Diff analysis for the English regions where there are sub-regions, where any changes are likely to impact most. “*Responds quickly to breaking stories*” and “*focus on my local area*” are consistently rated higher in importance. “*Coverage of news across my sub-region*” is at the bottom of the list.

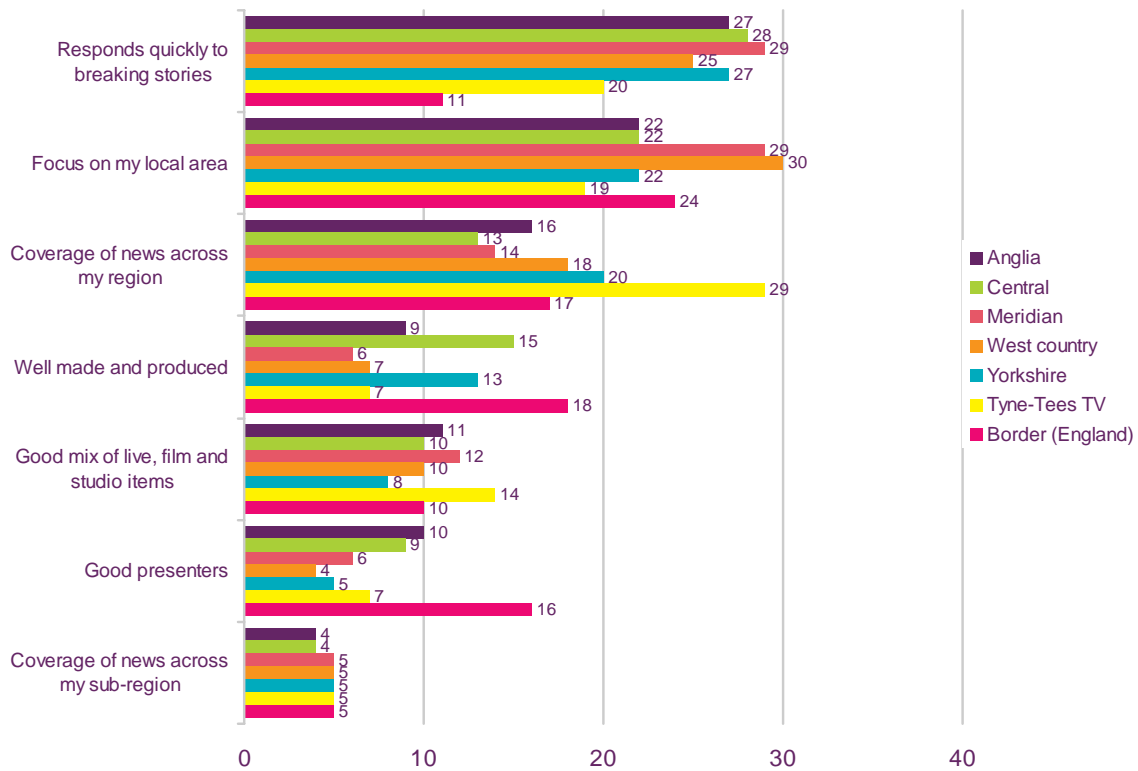
Figure 59: Max diff analysis – England regions with sub-regions



Source: Holden Pearmain
Base: English regions with sub-regions n=1.680

Looking in more detail at this analysis for each of these regions, on the whole there is little variation from the overall order of priorities. In West Country and Border England, “*focus on my local area*” is higher than “*responds quickly to breaking stories*”, but “*coverage of news across my sub-region*” remains near the bottom of the list. In Tyne Tees “*coverage of news across my region*” is higher in importance than elsewhere. Border England does show a slightly different patterns of results, with statements related to the quality of the news production, such as “*well made and produced*” and “*good presenters*”, having higher relative importance than elsewhere.

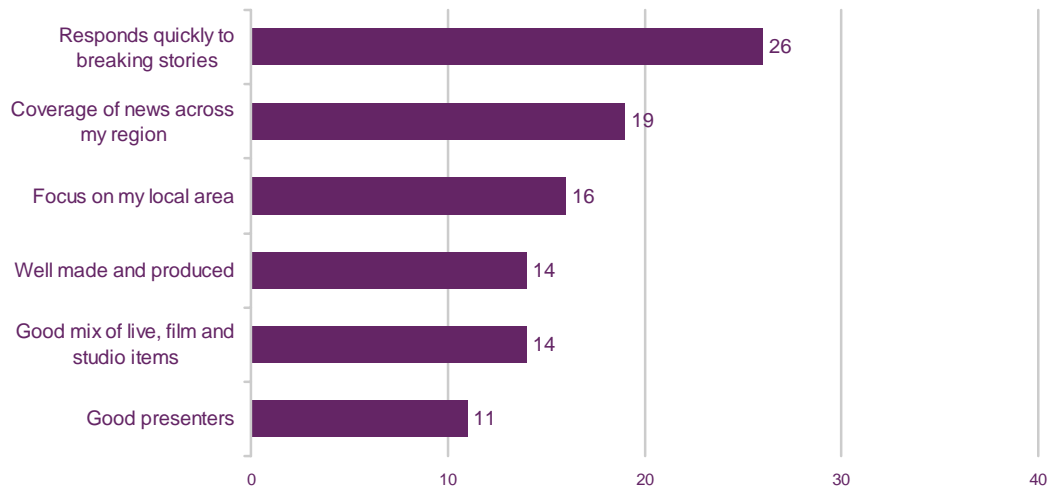
Figure 60: Max diff analysis – England regions with sub-regions



Source: Holden Pearmain
 Base: English regions with sub-regions n=1.680

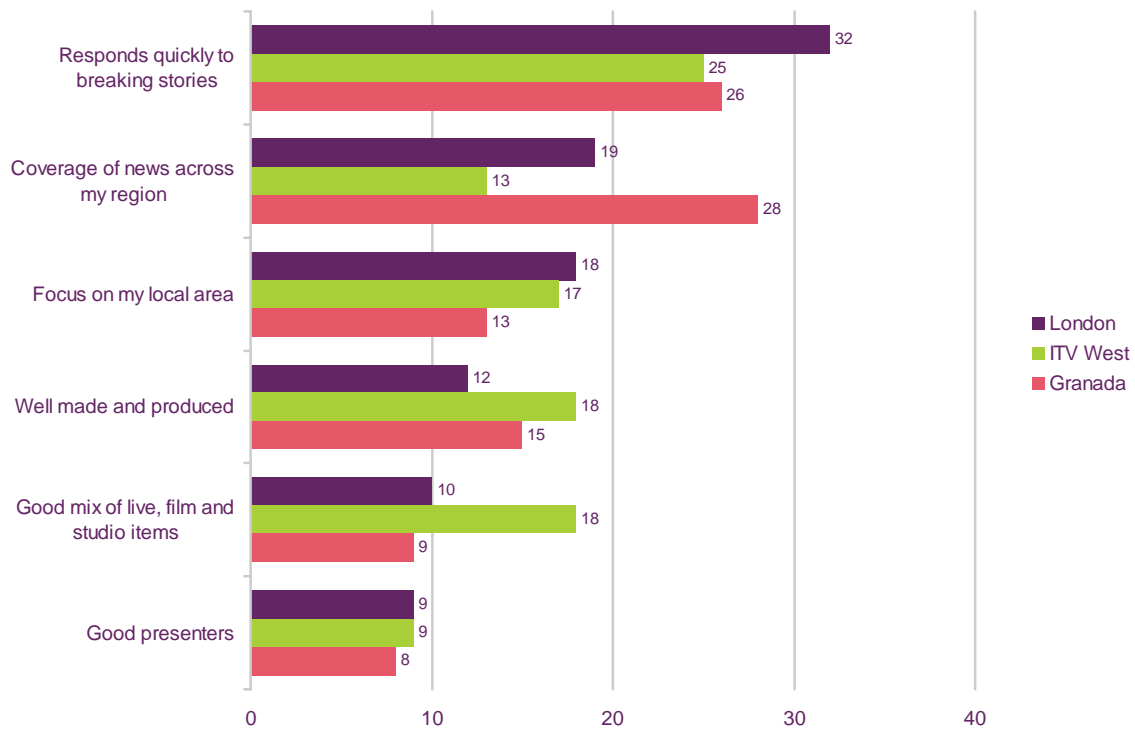
Figure 61 shows the same analyses for the regions in England where there are no sub-regions. The pattern of responses in the unaffected regions (those without sub-regions) is similar, although “*coverage of news across my region*” moves ahead of “*focus on my local area*”.

Figure 61: Max diff analysis – England regions with no sub-regions



Source: Holden Pearmain
Base: English regions with no sub-regions n=944

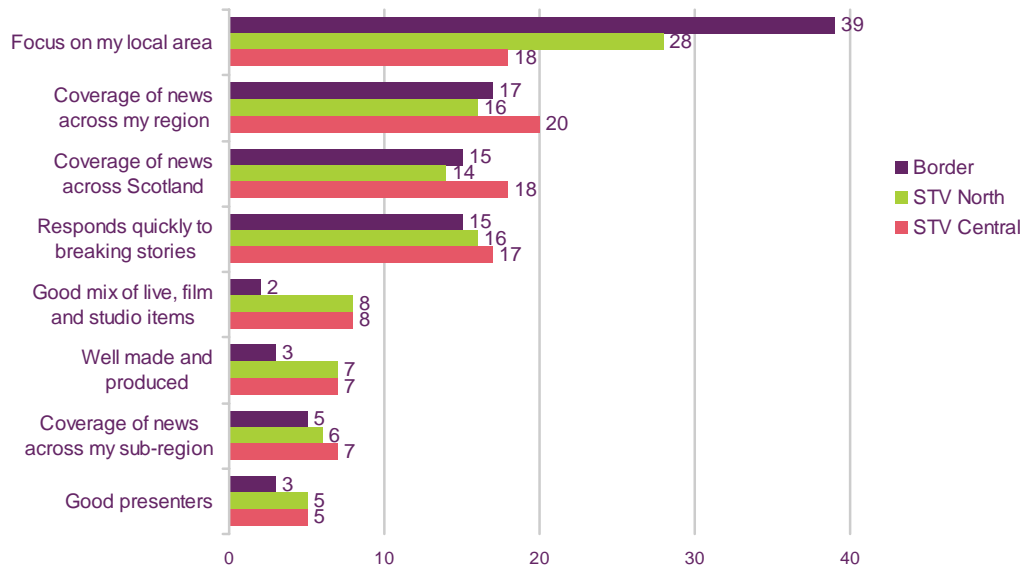
Comparison of the results by region, shown in figure 62, reveals little variation from the overall order of priorities. In Granada “*coverage of news across my region*” moves slightly ahead of “*responds quickly to breaking stories*”, while a “*good mix of live, file and studio-based items*” is of higher relative importance in ITV West than elsewhere.

Figure 62: Max diff analysis – England regions with no sub-regions

Source: Holden Pearmain
 Base: English regions with no sub-regions n=944

Border Scotland is the region where the pattern of results in the chip allocation is most similar to that from the max diff, indicating higher relative importance of local area and regional coverage. Overall, the priority order of news in Border Scotland is similar to that for the STV regions, but the importance placed on “*focus on my local area*” is much higher than elsewhere. This tallies with the satisfaction levels described earlier in this chapter, that are significantly lower for ITV Border news provision in Border Scotland compared with all other regions, particularly for “*focus on my local area*”.

Figure 63: Max diff analysis – Scotland



Source: Holden Pearmain
 Base: Border (Scotland) n=201

The pattern of results for Northern Ireland and Wales is different to those in other regions, partly explained by the different types of news available there. In both cases “*coverage of news across (NI/Wales)*” is of highest importance, but there are some differences in the pattern of results below this. In particular, “*focus on my local area*” is of second greatest importance in Wales but last in NI.

7 RESPONSES TO POSSIBLE CHANGES

All respondents were presented with a number of statements about possible changes to regional news programmes, and asked to indicate how much they agreed with each statement on a five-point scale from 1 to 5, where 1 means ‘strongly disagree’ and 5 means ‘strongly agree’.

As the proposals under consideration vary by region the question was introduced as:

“Ofcom is reviewing the obligations of broadcasters for providing regional news across the UK, to help maintain the quality of news and other programmes. This may mean changes to some regions or sub-regions, reducing the amount of regional news or changing when the news is broadcast.”

Note that these changes would not affect the BBC, which will continue to provide regional news in the way it does currently.

In order to help Ofcom evaluate these changes, can you tell me how much you agree or disagree with the following statements?”

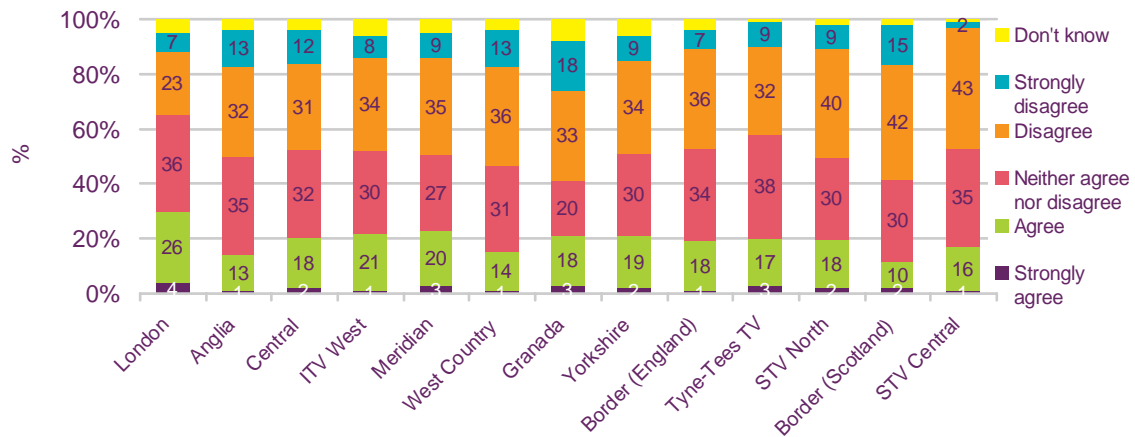
It should be noted that while this survey provides a snapshot view of possible changes and assesses respondents’ top-of-mind reactions these results should not be directly compared with the deliberative research, which provided the opportunity for participants to discuss potential changes and implications at length over the course of the day from a more informed perspective.

Overall there is little support for any possible changes trading off local coverage to maintain the quality of regional programming, most notably in Border Scotland where 57% disagree with this proposal. In Scotland the STV regions are on balance in favour of regional reporting being incorporated into a nationwide programme, but in Border Scotland this idea is rejected on balance.

The low level of agreement with “It is worth trading off the local focus of news stories to maintain the quality of the regional news programmes” is in line with the relatively higher importance we have already seen attached to local over regional news. In most regions barely one in five agree with this statement at all. Agreement is highest in London (30%), but unsurprisingly given other findings, agreement is lowest in Border Scotland (12%) – nearly three-fifths (57%) disagree with this statement in this region.

Figure 64: Agreement with “It is worth trading off the local focus of news stories to maintain the quality of the regional news programmes”

D2A It is worth trading off the local focus of news stories to maintain the quality of the regional news programmes

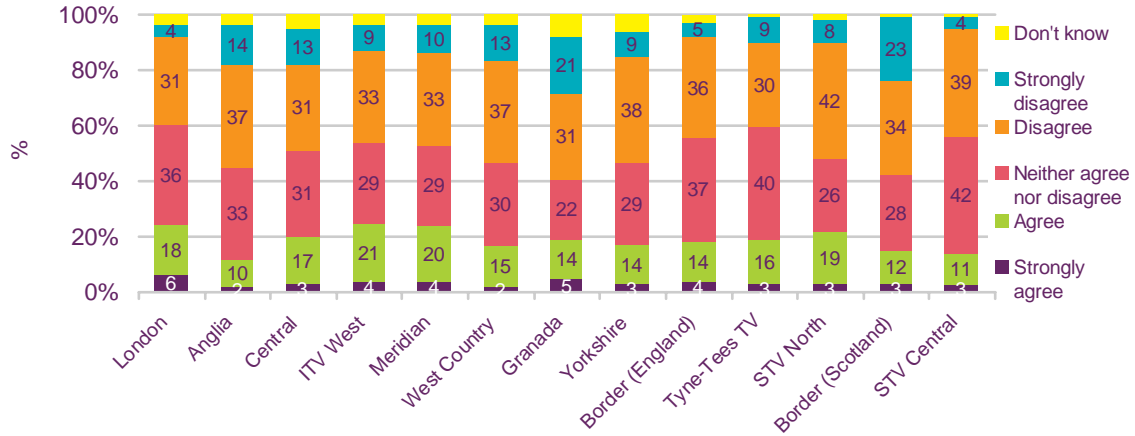


Source: Holden Pearmain
 Base: Total sample size n=3,248, minimum sample in any region n=200
 Not asked in NI or Wales

Reaction is very similar if local focus is traded off to maintain programme quality in general, other than regional news. Disagreement is again strongest in Border Scotland (57%).

Figure 65: Agreement with “It is worth trading off the local focus to maintain the quality of the programmes in general (other than news)”

D2B It is worth trading off the local focus to maintain the quality of programmes in general (other than news)

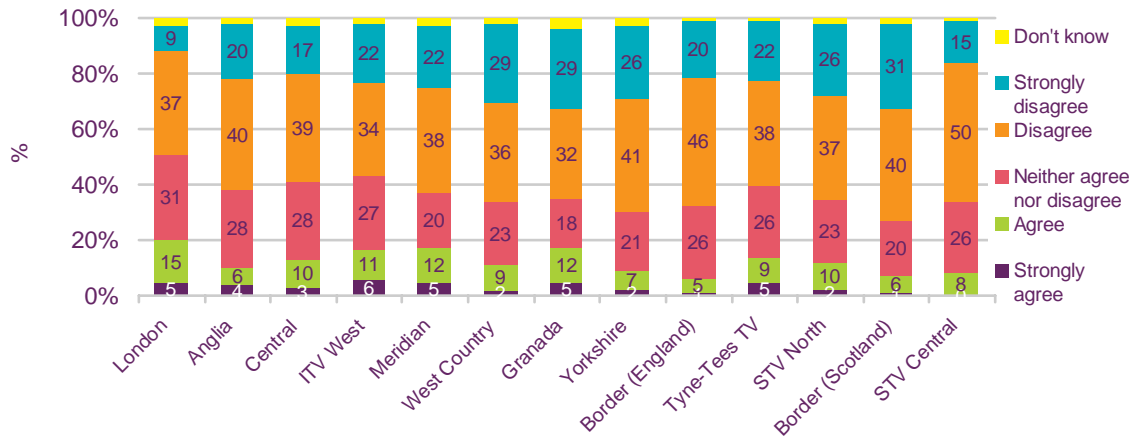


Source: Holden Pearmain
 Base: Total sample size n=3,248, minimum sample in any region n=200
 Not asked in NI or Wales

Very few respondents agree that they are not interested in regional news and so would be unaffected by any changes. In fact more than half of respondents in every region disagree that “I am not that interested in regional news so I would not be affected by any changes”. Strength of feeling is such that significant proportions in most regions strong disagree with this statement, most notably in Border Scotland (31%) and Granada (29%). Only in London do less than one in ten strongly disagree.

Figure 66: Agreement with “I am not that interested in regional news so I would not be affected by any changes”

D2C I am not that interested in regional news so I would not be affected by any changes



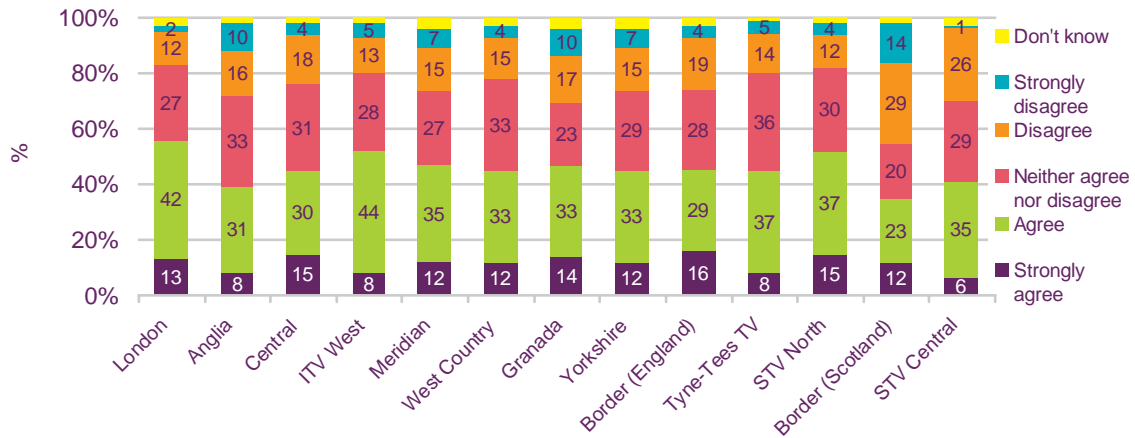
Source: Holden Pearmain
 Base: Total sample size n=3,248, minimum sample in any region n=200

Not asked in NI or Wales

However, many think that finding alternative sources for regional news would be easy. In most regions at least two-fifths of respondents agree in total with the statement “I would easily find alternative sources for regional news and information”. However, respondents in Border Scotland are least likely to agree (35%) and most likely to disagree (43%), making this the only region where there is a negative balance of opinion.

Figure 67: Agreement with “I would easily find alternative sources for regional news and information”

D2E I would easily find alternative sources for regional news and information

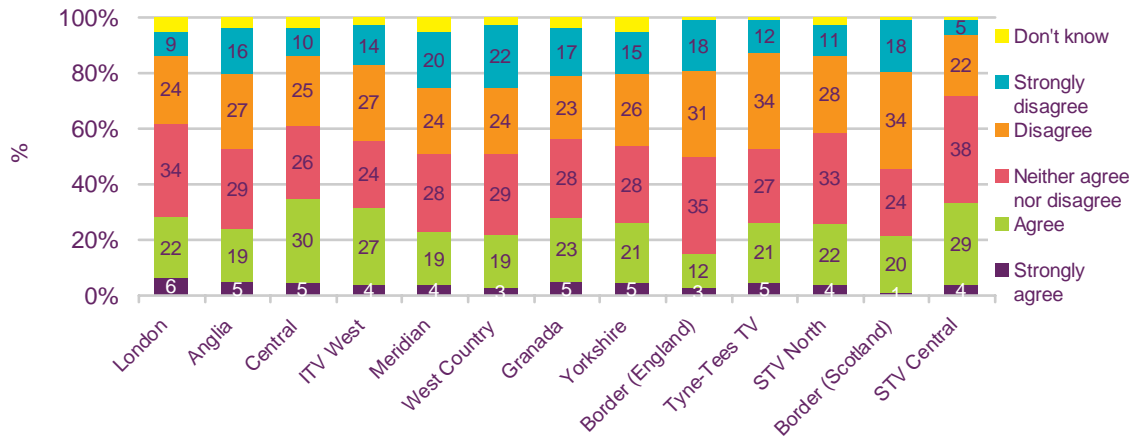


Source: Holden Pearmain
 Base: Total sample size n=3,248, minimum sample in any region n=200
 Not asked in NI or Wales

Balance of opinion is against combining regions to maintain news quality in all regions except Central, where respondents are neutral overall, although strong disagreement is double strong agreement. Unsurprisingly respondents in Border Scotland are least in favour of this option.

Figure 68: Agreement with “It would be worth combining some regions to maintain the quality of news programmes”

D2G It would be worth combining some regions to maintain the quality of news programmes

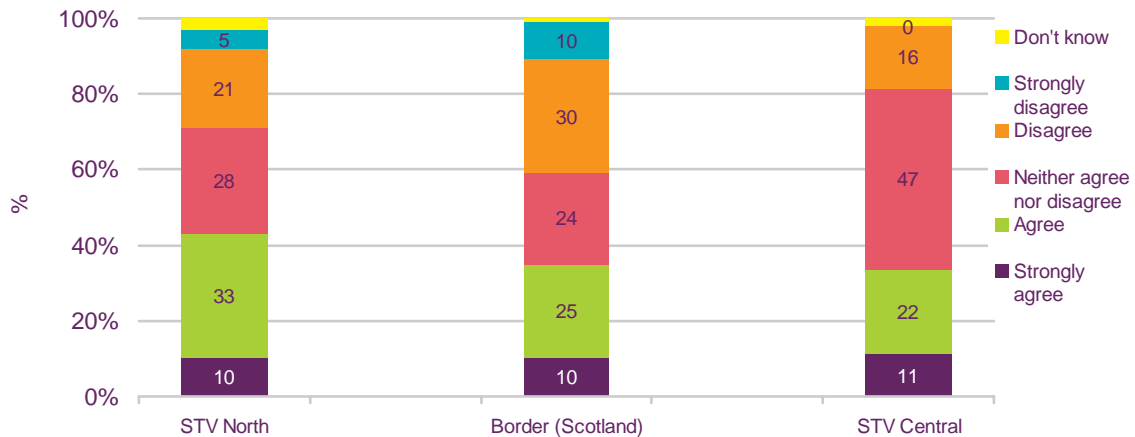


Source: Holden Pearmain
 Base: Total sample size n=3,248, minimum sample in any region n=200
 Not asked in NI or Wales

In Scotland views are polarised as to whether regional news should be part of news programmes covering the whole of Scotland. In all three regions a third or more are in favour of this approach. However, in contrast to the STV regions, in Border Scotland the balance of opinion is slightly against this option.

Figure 69: Agreement with “I would prefer news about my region to be reported within a programme that covers news across the whole of Scotland”

D2I I would prefer news about my region to be reported within a programme that covers news across the whole of Scotland

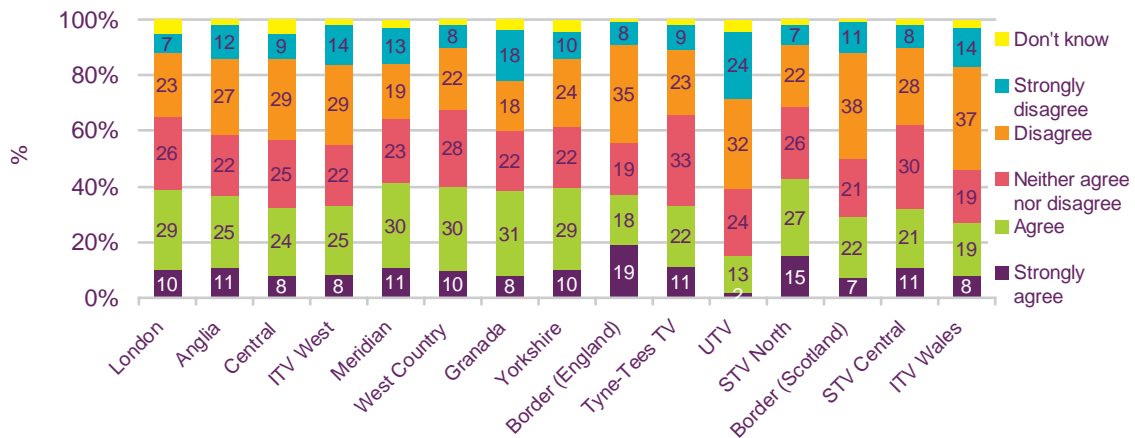


Source: Holden Pearmain
 Base: Scotland only n=624, minimum sample in any region n=200

Opinion is generally split as to whether respondents would prefer a single regional news programme in the evening to several bulletin throughout the day and late night (referred to as nation in Wales/Northern Ireland). Only in UTV is there clear opposition to this proposal, a quarter strongly disagreeing, 56% disagreeing overall. However, the balance of opinion is also against this approach in Border Scotland and ITV Wales. Opposition in Wales and Northern Ireland is perhaps more understandable given the focus is the reduction of national bulletins.

Figure 70: Agreement with “I would prefer one regional* news programme presented in the evening than several bulletins throughout the day and late night”

D2D I would prefer one regional news programme presented in the evening rather than several bulletins throughout the day and late night

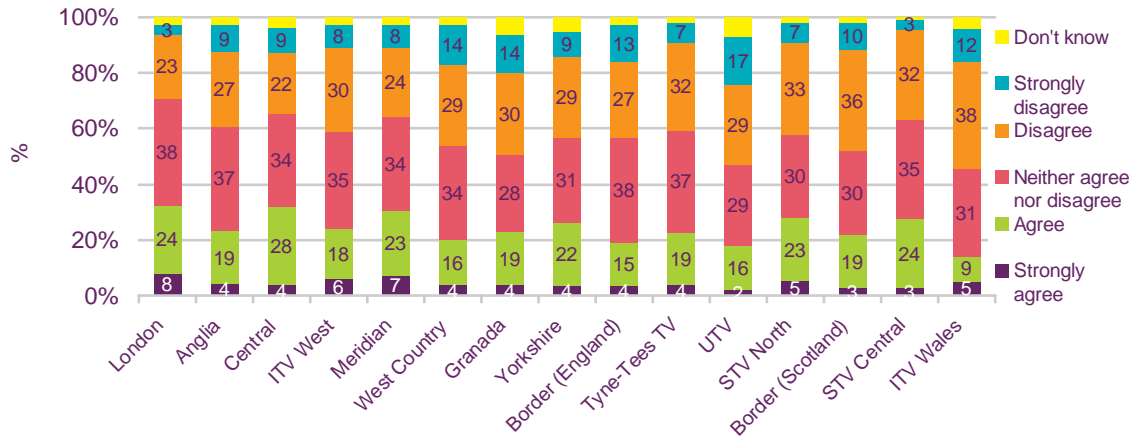


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200
 *Referred to as nation in Wales/Northern Ireland

However, there is much clearer and widespread opposition to the idea of reducing the volume of regional (national in Wales/Northern Ireland) news coverage to maintain the quality of regional news programmes. In most regions the balance of opinion is against this proposal, most notably again in UTV and also in ITV Wales, regions where the focus of questioning was national. However, respondents in Granada, West Country and Border Scotland are substantially against a reduction in the volume of regional news.

Figure 71: Agreement with “It is worth reducing the volume of regional* news coverage to maintain the quality of the regional news programmes”

D2F It is worth reducing the volume of regional news coverage to maintain the quality of the regional news programmes

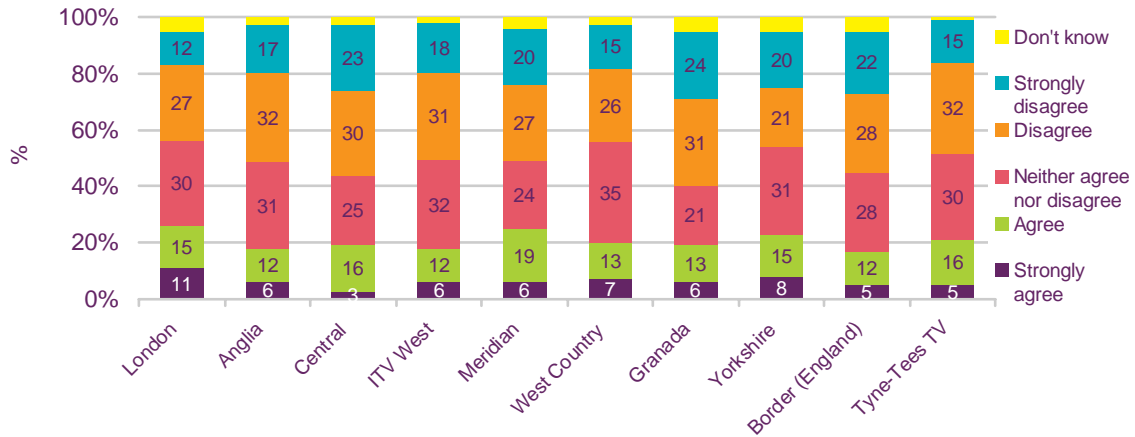


Source: Holden Pearmain
 Base: Total sample size n=3,706, minimum sample in any region n=200
 *Referred to as nation in Wales/Northern Ireland

No region believes that regional news provision can simply be left to the BBC. Opposition is particularly strong in Border England and Granada.

Figure 72: Agreement with “I think it is enough for the BBC to provide regional news, I don’t need it on any other channels”

D2H I think it is enough for the BBC to provide regional news, I don’t need it on any other channels

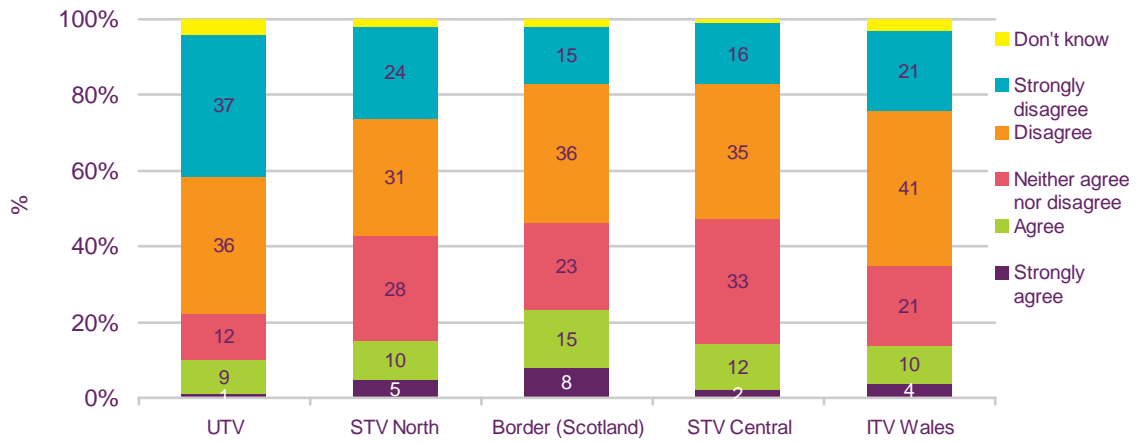


Source: Holden Pearmain
 Base: England only n=2,624, minimum sample in any region n=200

There is very strong opposition to leaving national news coverage to the BBC in UTV and Wales. Opposition is also strong across the Scottish regions.

Figure 73: Agreement with “I think it is enough for the BBC to provide national news, I don’t need it on any other channels”

D2H I think it is enough for the BBC to provide news for Wales/NI/Scotland, I don’t need it on any other channels



Source: Holden Pearmain

Base: Scotland, Wales and NI only n=1,082, minimum sample in any region n=200

8 DEMOGRAPHIC VARIANCES

In this chapter we begin with a look at the demographic profiles of the regions, which may impact on variations observed in behaviour and attitudes. We then look at the UK as a whole to see how demographics may affect current behaviour and attitudes, and reactions to the proposed changes.

8.1 Demographic profiles of the regions

We begin by looking at the age profile of the regions, shown in Figure 74. The age profile is broadly consistent across the regions. However, both London and UTV have a notably younger profile than average, with higher proportions of residents aged 16-34. By contrast West Country, and both Border regions, England and Scotland have an older profile than average, with more residents aged 55 or more

Figure 74: Age profile

%	Total	Region														
		London	Anglia	Central	ITV West	Meridian	West Country	Granada	Yorkshire	Border (England)	Tyne-Tees	UTV (NI)	STV North (Grampian)	Border (Scotland)	STV Central	ITV Wales
16 – 34	32	39	33	32	29	29	26	34	31	25	29	42	28	25	33	30
34 – 54	35	33	37	37	36	36	32	34	37	38	36	31	37	35	34	35
55 +	33	28	30	32	36	35	42	32	33	37	35	27	36	41	33	35

Source: Holden Pearmain

Base: Total sample size n=3,706, minimum sample in any region n=200

The gender profile across the regions is very consistent, averaging 49% male, 51% female. However, the social group profile does vary. Broadly speaking, London and the South East, encompassing London, Anglia and Meridian have a skew towards the AB social groups, which each of these regions has an above average proportion of ABC1s, and also ABs. Conversely the North of England, Scotland and to some extent Wales skew towards the C2DE social groups, in particular with regard to the proportion of DEs. This encompasses Granada, Yorkshire, Tyne Tees, Border Scotland, STV Central and North, and ITV Wales.

Figure 75: Social group profile

%	Total	Region														
		London	Anglia	Central	ITV West	Meridian	West Country	Granada	Yorkshire	Border (England)	Tyne-Tees	UTV (NI)	STV North (Grampian)	Border (Scotland)	STV Central	ITV Wales
AB	22	26	25	21	24	28	20	19	18	20	19	17	18	16	19	17
C1	29	33	30	27	30	33	32	29	27	30	26	28	26	25	24	29
C2	15	11	16	18	15	13	17	15	18	17	15	22	18	16	13	16
DE	34	29	29	34	30	27	31	38	37	34	40	33	37	42	44	37

Source: Holden Pearmain

Base: Total sample size n=3,706, minimum sample in any region n=200

Inevitably there are some correlations between social group and working status. Granada, ITV Wales and in particular Border Scotland have relatively low levels of employment. These areas tend to have higher levels of retirees, Border Scotland in particular, as do ITV West, Anglia and Tyne Tees to varying degrees. The profiles of Border Scotland and Border England are quite marked – the English side has notably higher than average levels of employment, as does UTV. Employment is also above average in London, Central and West Country. Unemployment is more common than average across the Scottish regions as a whole. Clearly employment levels will impact on when and how often residents are available to watch TV, and thus some aspects of their requirements of regional coverage.

Figure 76: Working status profile

%	Total	Region														
		London	Anglia	Central	ITV West	Meridian	West Country	Granada	Yorkshire	Border (England)	Tyne-Tees	UTV (NI)	STV North (Grampian)	Border (Scotland)	STV Central	ITV Wales
Full time	47	48	45	53	45	49	46	42	42	51	39	60	49	38	50	42
Part time	15	18	19	14	15	13	20	12	16	22	18	15	14	11	12	12
School / college	4	5	1	3	6	3	3	6	4	1	3	4	1	4	4	4
Unempl-oyed	5	6	4	4	1	3	4	4	6	3	4	4	7	7	10	5
Retired	20	17	23	19	24	19	18	26	21	13	23	13	15	28	14	23
Not working	10	6	7	8	8	13	10	10	11	11	13	4	14	11	10	14

Source: Holden Pearmain

Base: Total sample size n=3,706, minimum sample in any region n=200

Next we look at the TV platform available in the home. This may impact on reactions to how many channels carry regional news. UTV and Border Scotland stand out as having potentially the most restricted platform, a fifth in each region only having access to the main channels (i.e. BBC One, BBC Two, ITV/STV/UTV, Channel 4 and Five). Satellite and cable services are now widespread. However, those living in ITV West, West Country, Granada are less likely to have either (in addition of course to those in UTV and Border Scotland). Conversely, those in Border England and ITV Wales are more likely than average to have cable or satellite services. Here to we see a significant difference between those living in Border England and Border Scotland.

Figure 77: TV platform profile

%	Total	Region														
		London	Anglia	Central	ITV West	Meridian	West Country	Granada	Yorkshire	Border (England)	Tyne-Tees	UTV (NI)	STV North (Grampian)	Border (Scotland)	STV Central	ITV Wales
Main channels only	9	10	11	10	12	7	8	11	5	6	5	22	5	19	6	8
Cable TV	17	19	18	23	19	13	10	13	14	9	16	9	11	1	23	14
Satellite	40	41	42	35	33	46	43	36	42	55	42	37	49	47	33	49
Freeview	33	29	28	31	34	33	36	40	39	28	35	32	35	32	37	27
Other	1	1	1	0	2	1	2	1	0	3	2	0	1	2	1	2

Source: Holden Pearmain

Base: Total sample size n=3,706, minimum sample in any region n=200

8.2 Current provision

8.2.1 Source of news

Respondents aged 55+ are more likely to use either of the two PSB channels than younger age groups. 84% of those aged 55+ use BBC1 as a source of regional news, and 72% ITV/STV/UTV, compared with UK averages of 78% and 67% respectively. This older age group are also more likely to use newspapers as source (56% compared with an average 52%). However, they are less likely to use the internet to source regional news than younger age groups (26% compared with a UK average of 32%). A similar pattern applies in Scotland, Northern Ireland and Wales with regard to sources of national news, as it does also with regard to both sub-regional and local news.

The same is largely true with regard to main sources of regional news. Thus usage of ITV/STV/UTV is higher amongst the 55+ age group, at 34% compared with the UK average of 30%. Comparable figures for BBC1 are 42% for those aged 55+, compared to a UK average of 37%. As a main source there is no significant age difference in the use newspapers. However, the oldest age group are significantly less likely than average (7%) to use the internet as their main source (only 3% do so). A similar pattern applies in Scotland, Northern Ireland and Wales with regard to the main source of national news, as it does also with regard to both sub-regional and local news.

8.2.2 Frequency of watching news programmes

It is commonly known that for cultural and lifestyle reasons, the youngest age groups are less likely to watch television. This pattern can be seen in the frequency of watching news, weather and current affairs programmes at a UK and regional level. The daily audience for each of these programmes increases with age. However, it is also true that for most programmes of this nature assessed in this research, those aged 55+ are equally likely to watch them on a daily basis whether they be on ITV/STV/UTV or BBC1. However, younger respondents have a consistent tendency to watch these types of programmes more often on ITV/STV/UTV than on BBC1. Thus 29% of those aged 16-34 watch regional news on ITV/STV/UTV on a daily basis, compared with 51% of those aged 55+. The comparable figures for BBC1 are 20% of 16-34 year olds compared with 45% of those aged 55+.

There are also some age related variations in the timing of regional news programmes and bulletins watched, which no doubt reflect lifestyles to some extent. Thus during the week those aged 55+ are less likely than average to watch the breakfast news (37% compared with 41%), whilst they are more likely to watch at lunchtime (34% compared with 24%). This pattern is not surprisingly seen with regard to working status. Retirees are least likely to be watching at breakfast (37%), and most likely, along with those not working, to be watching at lunchtime (37% and 39% respectively). The late evening slots is most commonly viewed by those in full time work (50%). Nonetheless, there is a sizeable audience for all slots though out the day, with the exception of mid-morning.

Although some variation in viewing patterns exists for the weekend news programmes, this is much less marked than during the week.

8.2.3 Satisfaction with current provision

Those aged 55+ are more likely to be very satisfied with the regional output of both ITV/STV/UTV and BBC1. However, this tendency is less consistent with regard to the geographical scope of coverage. However, there is consistency in that neither of the PSB channels engenders a higher level of satisfaction amongst the older age group.

8.2.4 Importance of news delivery

It is perhaps not surprising that the older age groups are more likely to think that it is important to show regional news on more than one of the main TV channels, given that they watch these programmes more often. This in England and Scotland 46% of those aged 55+ say that it is very important to show regional news on more than one of the main TV channels, compared with 29% of those aged 16-34. In Scotland, Wales and Northern Ireland the same proportions of each age group state that it is very important to show national news on more than one of the main TV channels. However, each of the age groups puts a similar relatively low importance on showing sub-regional news on more than one channel.

8.2.5 Responses to possible changes

Whilst those aged 16-34 are still more likely to disagree than agree that they are not interested in regional news and thus would be unaffected by proposed changes, nonetheless opposition to the changes is much stronger amongst older age groups. Thus whilst 44% of those aged 16-34 disagree that they are not interested in regional news, this rises to 69% of those aged 55+. Weaker opposition amongst 16-34 year olds to the proposed changes is a consistent trend, and for three of the options they have a neutral balance of opinion – with regard to either reducing the volume of regional news or combining regions to maintain quality, and reducing output to one evening bulletin.

9 REGIONAL FOCUS

9.1 West/ Westcountry

Regional profile

West Country has an older age profile than average, with 42% aged 55+. However, the region is not above average in terms of the proportion retired, but rather for the proportion in employment (66%). It is in ITV West where there is a higher proportion of retirees than average (24%), although this is not substantially above the norm (20%). Both regions are less likely to have cable and satellite, which may limit access to regional news.

Current provision

BBC1 is a more common source, and main source, of sub-regional news in West Country than ITV1 (59% compared with 41% use at all), but the two channels have greater parity in ITV West. BBC1 is also favoured in West Country for local news. This stronger affiliation to BBC1 is also seen in that two-fifths watch regional news on the channel on a daily basis, which is above average, as is the 23% who watch BBC1 regional current affairs programmes. Respondents in West Country are also the most likely to watch the regional weather on BBC1 every day (45%). They are also most satisfied with how well the BBC regional news is made and produced, and its presenters (35% and 34% very satisfied respectively). However, it is respondents in ITV West who are most satisfied with the local focus of the BBC's regional news (25% very satisfied), although this is an aspect of coverage that engenders least satisfaction. The Westcountry is one of the regions where respondents are most likely to be found to access news about their region and local area online.

Respondents in ITV West are closer to average in their behaviours and attitudes regarding current regional programming.

Importance of regional news delivery

The max diff analysis shows that focus on the local area, whilst important in all areas, is slightly more important in West Country than in most other regions. However, in line with elsewhere, coverage of sub-regional news remains a low priority. Nonetheless,

when importance is assessed without a trade-off element, it is in the West Country region where sub-regional news is given most importance relative to regional news with regard to showing the programmes on more than one of the main channels, although regional news nonetheless remains more important. However, views are quite polarised in the region in this respect.

Response to possible changes

In most respects the views of respondents living in the West Country region and ITV West reflect those held across the UK. However, whilst opposition is widespread to a reduction in the volume of regional news in order to maintain the quality of this programming, in the West Country region this opposition is substantial.

9.2 Border (England & Scotland) and Tyne Tees

Regional profile

Both Border regions are characterised by having an older age profile than average, with more residents aged 55+. Border Scotland has a relatively low level of employment, but a high proportion of retirees, and thus a higher than average proportion of social group DE. By contrast there are higher than average levels of employment in Border England, Tyne Tees has a similar profile to Border Scotland in these respects.

Border Scotland and Border England also differ in terms of platform. A fifth of those in the Scottish region only have access to the five main TV channels, a skew driven by the older population. On the English side there is above average penetration of cable and satellite services, which transcends all age groups, indeed the older generations are slightly more likely to have Sky.

Current provision

ITV1/ITV Border is a more common source, and main source, of most types of news in Border Scotland, and to a lesser extent Tyne Tees, particularly so amongst the younger population. Amongst those aged 55+ BBC does become a more preferred choice.

This skew is not seen with those aged 55+ living in Border England, who tend to use ITV1 and BBC1 equally for this purpose. The younger population in the region maintain

a bent toward ITV1. Border Scotland is marked out by the relatively low use of newspapers for regional and local news, but respondents here are more likely than average to use the BBC and ITV local websites to access regional and local news. Usage of the ITV website is also above average in Tyne Tees.

Border Scotland has a higher than average proportion of daily viewers of regional news and weather programmes on ITV Border, but they watch regional current affairs programmes on the channel less often than the norm. They have a very similar pattern of viewing for the equivalent BBC1 programmes. Respondents in Border Scotland are more likely to watch lunchtime regional news bulletins, and breakfast and early evening bulletins less commonly, perhaps as a result of the region's demographic profile. In Tyne Tees respondents have a greater tendency to watch mid-morning, behaviour that may also be influenced by demographics.

Border Scotland is generally less satisfied than average with the current provision of regional programmes across many dimensions from either of the two PSB channels. This is typified by the notably high level of dissatisfaction with both ITV's and the BBC's coverage of sub-regional news (21% and 24% respectively). Border England and Tyne Tees tend to be among the pack with regard to their satisfaction with the current output.

Importance of regional news delivery

Respondents in Border Scotland put relatively higher importance on local area and regional coverage. They place particularly higher importance on "*focus on my local area*" than other Scottish regions. In line with elsewhere, the local area focus and the speed of breaking stories are high up the priority list for Border England and Tyne Tees, with sub-regional coverage near the bottom of the list.

The belief that regional news needs to be on more than one main channel is particularly strong in Border Scotland, whereas whilst still important in Border England this issue is relatively less so.

Response to possible changes

Border Scotland is the region that is least likely to agree to trading off local focus to maintain regional programme quality – 57% disagree with this proposal. Respondents in this region are also least likely to agree that they are not interested in regional news and so will be unaffected by any changes (31% strongly disagree), and are in the only regions where on balance it is thought it will not be easy to find alternative sources of regional news. Border Scotland is least in favour of combining regions to maintain quality, nor would they like regional news to be incorporated with Scottish news. Respondents here are also clearly against any reduction in the volume of regional news. There is widespread opposition to leaving regional news to just the BBC, but this is particularly strong in Border Scotland, as it is in Border England.

This partiality toward a local/regional focus in the news from those in Border Scotland appears to be across the board and not a result of demographic variations. As reported earlier, the region has a higher proportion of the population aged 55+. Disagreement to trading off local focus to maintain regional programme quality is high even within the youngest age group (16-34) at 53%. The UK average is 42%. The proportion who strongly disagree they are not interested in regional news and so will be unaffected by any changes, is also equally high in this group at 29%.

9.3 Central

Regional profile

The demographic profile of Central is broadly on the UK norm, although employment levels are above the norm.

Current provision

The access to regional news and attitudes towards current provision in Central is very close to the UK norm. Respondents in Central are most likely (53%) to watch the late evening regional news bulletin, reflecting the employment profile of this region.

Respondents in Central are some of the least likely to be very satisfied with ITV's coverage of sub-regional news. However, it is the inability to answer the question that is depressing satisfaction here, rather than higher levels of dissatisfaction.

Importance of regional news delivery

The max diff analysis shows that as in other areas responding quickly to breaking stories and focus on the local area are the priorities for Central. In line with elsewhere, coverage of sub-regional news remains the lowest priority

Response to possible changes

In most respects the views of respondents living in the Central region reflect those held across the UK. Thus most proposals to change regional news coverage are opposed. However, respondents in Central are least opposed to combining regions to maintain the quality of news programmes. This region is neutral on this issue, as opposed to the negative balance of opinion elsewhere.

9.4 Meridian^{iv}

Regional profile

The demographic profile of Meridian is broadly on the UK norm. However, Meridian has a higher proportion of ABC1s than average.

Current provision

The access to regional news and attitudes towards current provision in Meridian is very close to the UK norm. In Meridian there is a greater reliance on newspapers for local news rather than using TV.

In Meridian there is lower satisfaction with the local focus of ITV1's regional news, where less than one in ten are very satisfied. Respondents in Meridian are some of the least likely to be very satisfied with ITV's coverage of sub-regional news. However, it is the inability to answer the question that is depressing satisfaction here, rather than higher levels of dissatisfaction.

Importance of regional news delivery

^{iv} Note that viewers in Thames Valley are included in the sample for the Meridian region

The max diff analysis shows that as in other areas responding quickly to breaking stories and focus on the local area are the priorities for Meridian. In line with elsewhere, coverage of sub-regional news remains the lowest priority

Response to possible changes

In most respects the views of respondents living in the Meridian region reflects those held across the UK. Thus most proposals to change regional news coverage are opposed.

9.5 London

Regional profile

The demographic profile of London is quite different to the UK as a whole. The region is notably younger, with a high proportion of residents aged 16-34. It also has a higher proportion of ABC1s and ABs. Employment levels are above average. However, TV platform usage is in line with the UK norm.

Current provision

BBC1 is more commonly used than ITV1 in London for all types of news, weather and current affairs programmes, be they UK, regional or local. It is the most distinctive region in terms of its greater use of BBC1. The employment profile of London impacts on when residents here can watch regional news, this being the second most likely to region to regularly watch the late evening bulletin after the 10pm news (49%).

The London region is often more critical of the ITV regional news output. In particular they are more critical of the local focus (only one in ten very satisfied), and less satisfied than average with regional coverage (45%). They are less critical of BBC regional news in this respect.

Importance of regional news delivery

The max diff analysis shows that as in other areas responding quickly to breaking stories and focus on the local area are of high importance for the London region. However, the speed of breaking stories is of particular importance to this region, and regional coverage is as important as a local area focus.

Response to possible changes

London is most willing to consider trading off local focus to maintain the quality of regional news (30% agree) but the balance of opinion is nonetheless against this proposal. Respondents in this region are also least likely to disagree that a lack of interest in regional news means that they would be unaffected by any change (less than one in ten strongly disagree, although again on balance this region disagrees). In other respects the London respondents do not differ greatly from most of the UK in opposing the options put to them.

9.6 Anglia

Regional profile

The demographic profile of Anglia is very similar to the UK as a whole, particularly in terms of age profile. The region has a slightly higher proportion of people in social group AB but has a higher level of retirees and part time workers than is the norm.

TV platform usage is in line with the UK norm.

Current provision

Respondents in Anglia are very close to the UK norm in their usage of current programming and their attitudes towards it. Similar proportions of people claim to use both BBC1 and ITV1 for regional, sub-regional and local area news in Anglia, with neither channel particularly dominant in this region.

Radio is more likely to be mentioned as an alternative source of regional or sub-regional news than in most other English regions.

Importance of regional news delivery

The max diff analysis shows that responding quickly to breaking stories and focus on the local area are the highest priorities in Anglia, followed by coverage of news across

their region. Coverage of news across the sub-region is the lowest priority, as in other regions where there are sub-regions.

Response to possible changes

Respondents in Anglia reflect the UK norm in their opposition to the proposals to reform regional news programming. People place relatively high levels of importance on news about the region being shown on more than one channel, with very low levels of agreement that regional news provision could be left to the BBC.

9.7 STV North and Central

Regional profile

The demographic profile of the two STV regions is skewed towards the C2DE social group spectrum, with a particularly high proportion of DEs. This is related to the lower levels of employment in these regions.

Current provision

STV is more commonly used than BBC1 in the STV regions for all types of news, weather and current affairs programmes, be they UK, regional or local. This distinction is greatest in STV North – 69% use STV for regional news, compared with 44% using the BBC. This skew away from BBC1 in STV North is even more pronounced for the main source of regional news, where the channel is infrequently named, and newspapers play as large a role as STV. A similar, although more TV-centric pattern is observable in STV Central also. BBC1 is also little used in these regions as a principal source of news about Scotland (on a par with newspapers). STV is used for this purpose twice as commonly. The same pattern is true with respect to sub-regional news. In these regions newspapers are the principal source of local news.

Nine in ten respondents in STV Central and North have used the BBC website for regional news, with high proportions using this source regularly (80% and 78% respectively). The STV website is rarely used for this purpose, although there is a small regular core user base of around one in ten respondents using the site for local news.

Respondents in the STV regions are amongst the most regular viewers of all STV news, weather and current affair programmes regardless of geographical focus. Respondents in STV North are very often the heaviest viewers. Conversely, respondents in these two regions are among the least likely to be regular viewers of the equivalent programmes on BBC1.

Respondents in STV Central and North are among the most critical of both STV and BBC regional programming in terms of production quality and presenters. Views of the local focus of STV's regional news are polarised in the STV regions, which are both most likely to be satisfied, but also amongst the most likely to be dissatisfied. However, dissatisfaction is greater for the BBC in this respect, particularly in STV North, where 24% are dissatisfied with the local focus. Respondents in these areas are more satisfied with the national coverage provided by the two channels, although one in ten of those in STV North are dissatisfied with the BBC output. There is less satisfaction with the sub-regional coverage of either channel, and real dissatisfaction with the BBC, most notably in STV North, where quarter are dissatisfied.

Importance of regional news delivery

The max diff analysis shows that as in other areas focus on the local area is of high importance for the STV regions. However, although this has a clear lead in STV North, in STV Central regional news coverage, coverage of news across Scotland and the speed of breaking stories are of similar importance.

As in other regions where there are sub-regions, coverage of the latter is a low priority in both STV regions, although good presenters are of slightly lower importance.

Respondents in both STV regions are in line with the UK in thinking it is important to have regional news on more than one main TV channel, although those in STV North are among the least committed to this.

Response to possible changes

Respondents in STV Central and North reflect the UK norm in their opposition to the proposals to reform regional news programming. It is not surprising that they are

particularly strongly opposed to regional news only being available on the BBC, given the skew in their viewing behaviour towards STV.

9.8 Granada

Regional profile

The demographic profile of Granada is skewed towards the C2DE social group spectrum, with a particularly high proportion of DEs. In Granada this is related to below average employment levels, and above average retirement levels.

Cable and satellite penetration are below average in Granada.

Current provision

Respondents in Granada are generally in line with the UK averages in terms of how they source news, and their viewing behaviour with regard to regional programming. Respondents here have no substantial skew in favour of either ITV or BBC. Although TV plays a major role in news provision in Granada as it does elsewhere, nonetheless newspapers, and to a lesser extent radio, are relatively common sources of local news in this region.

Low employment and high levels of retirement in Granada mean that the weekly mid-morning and lunchtime regional news bulletins attract larger audiences than elsewhere (22% and 34% respectively).

Granada television has a proud and renowned heritage, and this may be reflected in the higher levels of satisfaction seen in this region. Respondents here are most likely to be very satisfied with ITV regional news with regard to production quality (27% very satisfied), the presenters (26%), the local focus (25%) and the regional coverage (31%).

Importance of regional news delivery

The max diff analysis shows that as in other unaffected areas (i.e. without sub-regions) coverage of news across the region is given higher priority than focus on the local area. In Granada. The speed of breaking stories is also a top priority.

Respondents in Granada think it is particularly important that regional news is available on more than one channel, around half agreeing with this statement.

Response to possible changes

Respondents in Granada reflect the UK norm in their opposition to the proposals to reform regional news programming. However, there is particularly strong disagreement in Granada with the suggestion that they are not interested in regional programming and so will be unaffected by any changes (29% strongly disagree). Respondents in this region are also more opposed than average to reducing the volume of regional news to maintain quality, and the proposal that the BBC could be the sole provider of regional news.

9.9 Yorkshire

Regional profile

The demographic profile of Yorkshire is very similar to the UK as a whole in terms of age and working profile. There is however a skew towards C2DE social group spectrum, with a particularly high proportion of DEs.

Freeview penetration is slightly higher than the UK norm in Yorkshire but cable penetration is slightly lower.

Current provision

Respondents in Yorkshire are generally in line with the UK averages in terms of how they source news, and their viewing behaviour with regard to regional programming. Respondents here have no substantial skew in favour of either ITV or BBC.

However, there are some differences in the other sources used for local area news; people in Yorkshire are less likely than average to use the radio as a source for local news, but significantly more likely than other English regions to mention gossip or word of mouth.

Respondents in the Yorkshire region also broadly mirror the UK norm in terms of behaviour and satisfaction.

Importance of regional news delivery

The max diff analysis shows that the speed of breaking stories is of highest priority in Yorkshire, with focus on my local area and coverage of news across my region close behind. Coverage of news across my sub-region and good presenters are the joint lowest priorities.

Response to possible changes

Respondents in the Yorkshire region reflect the UK norm in their opposition to possible changes to regional news programming.

9.10 Wales (ITV Wales)

Regional profile

ITV Wales has a gentle skew towards the C2DE social group spectrum, with related lower levels of employment.

Respondents in Wales are more likely than average to have cable or satellite services.

Current provision

Respondents in Wales are more inclined to use the BBC as a source of news, particularly at a local level. Radio and newspapers are a common alternative source of regional and local news. In Wales the BBC web site is common used as a source of regional and local news.

The pattern of viewing for news and current affairs programmes is not substantially different from the UK norm, In fact ITV Wales is amongst the most likely to watch the BBC regional news on a daily basis (around two-fifths of respondents). Satisfaction with current provision in the ITV Wales region is broadly in line with elsewhere. There is a tendency for respondents in the ITV Wales region to be more positive about the BBC.

Importance of regional news delivery

The pattern of results for Wales is different to that in most other regions, partly explained by the different types of news available there. *Coverage of news across Wales* is of highest importance, and *focus on my local area* is second in importance.

Response to possible changes

Respondents in the ITV Wales region reflect the UK norm in their opposition to the proposals to reform regional news programming. The balance of opinion in Wales is against one regional news programme in the evening as opposed to several bulletins through the day and late night. Opposition may be because in this case region equals nation. The national focus of questioning may also explain why the proposal to reduce the volume of regional news to maintain programme quality is so soundly rejected in this region, as is the suggestion that the BBC could be the sole provider.

9.11 Northern Ireland (UTV)

Regional profile

UTV has a notably younger profile than average, with a high proportion of 16-34 year olds.

A fifth of respondents in the UTV region only have access to the five main channels.

Current provision

Respondents in the UTV region have a greater tendency to use UTV rather than BBC1 for access to news, be it local, regional or national. There is also a relatively high use of radio in particular and newspapers for regional and local news, perhaps reflecting the restricted TV platform commonly available in this region. Around two fifths of respondents in UTV regularly use the ITV website for both regional and local news, despite the lack of internet penetration in this region. Conversely, they are least likely to use the BBC website for the same purpose (although at 35% this is still relatively high given internet penetration).

The pattern of viewing for news and current affairs programmes is not substantially different from the UK norm, In fact UTV is amongst the most likely to watch the BBC regional news on a daily basis (around two-fifths of respondents). The other major

distinction is that respondents in UTV are much more likely than those anywhere else to watch the breakfast bulletins on ITV. They also tend not to watch BBC current affairs programmes, be they UK or regional.

Satisfaction with current provision in the UTV region is broadly in line with elsewhere. There is a tendency for respondents in UTV to be more positive about UTV's regional news coverage.

Importance of regional news delivery

The pattern of results for Northern Ireland is different to those in most other regions, partly explained by the different types of news available there. *Coverage of news Northern Ireland* is of highest importance. However, *focus on my local area* is of least importance in Northern Ireland.

Respondents in UTV think it is particularly important that regional news is available on more than one channel, around half agreeing with this statement.

Response to possible changes

Respondents in the UTV region reflect the UK norm in their opposition to the proposals to reform regional news programming. However, there is particularly strong disagreement in UTV with the preference for one regional news programme (in the evening as opposed to several bulletins through the day and late night (56% disagree, a quarter strongly). Opposition may be because in these cases region equals nation. However, in UTV there is also a very strong audience for breakfast bulletins, which may reject evening-only bulletins. The national focus of questioning may also explain why the proposal to reduce the volume of regional news to maintain programme quality is so soundly rejected in UTV, as is the suggestion that the BBC could be the sole provider.

APPENDIX A – Quotas and Achieved Interviews

Achieved sample^v:

TOTAL	3,706
England	2,624
Scotland	624
Wales	225
NI	233
London	219
Anglia	283
Central	385
ITV West	203
Meridian	350
West Country	213
Granada	246
Yorkshire	276
Border (England)	214
Tyne-Tees TV	235
UTV (NI)	233
STV North	223
Border (Scotland)	201
STV Central	200
ITV Wales	225

Demographic targets, achieved and weighted sample:

TARGET	15-34	35-54	55+	Males	Females	AB	C1	C2	DE	Urban	Small Town	Village/ Hamlet
London	40%	34%	26%	48%	52%	26%	33%	11%	30%	90%	5%	5%
Anglia	31%	36%	34%	49%	51%	25%	30%	15%	29%	70%	15%	15%
Central	31%	35%	33%	49%	51%	21%	28%	17%	35%	90%	5%	5%
HTV West	29%	35%	36%	49%	51%	23%	31%	16%	30%	70%	15%	15%
Meridan	30%	36%	34%	49%	51%	27%	32%	14%	27%	70%	15%	15%
West Country	26%	33%	41%	48%	52%	19%	32%	17%	32%	50%	25%	25%
Granada	32%	35%	33%	48%	52%	20%	28%	15%	37%	85%	5%	10%
Yorkshire	31%	34%	35%	49%	51%	18%	27%	17%	37%	70%	15%	15%
Border (England)	28%	35%	37%	49%	51%	18%	28%	19%	35%	30%	20%	50%
Tyne Tees	30%	36%	35%	49%	51%	18%	26%	16%	39%	70%	15%	15%
UTV	37%	33%	31%	49%	51%	17%	30%	21%	32%	70%	30%	0%
Grampian	31%	36%	33%	49%	51%	19%	27%	17%	37%	40%	20%	40%
Border (Scotland)	26%	36%	38%	48%	52%	15%	26%	17%	41%	20%	30%	50%
STV	33%	35%	32%	48%	52%	19%	26%	14%	41%	80%	10%	10%
HTV Wales	31%	34%	35%	48%	52%	18%	29%	16%	37%	60%	20%	20%

^v Note that viewers in Thames Valley are included in the sample for the Meridian region

ACHIEVED	15-34	35-54	55+	Males		Females		AB	C1	C2	DE	Urban	Small Town	Village/ Hamlet
				Males	Females									
London	32%	47%	21%	39%	61%	30%	32%	11%	27%	87%	5%	9%		
Anglia	29%	49%	22%	50%	50%	20%	27%	14%	39%	75%	11%	14%		
Central	30%	46%	24%	49%	51%	19%	28%	14%	39%	85%	8%	7%		
HTV West	29%	46%	24%	43%	57%	23%	31%	13%	34%	71%	19%	10%		
Meridan	28%	46%	26%	41%	59%	21%	30%	14%	35%	75%	6%	19%		
West Country	27%	45%	28%	36%	64%	17%	31%	12%	39%	62%	16%	23%		
Granada	34%	43%	23%	49%	51%	17%	30%	16%	37%	83%	6%	11%		
Yorkshire	30%	50%	20%	43%	57%	18%	29%	13%	40%	79%	14%	7%		
Border (England)	36%	44%	20%	30%	70%	15%	29%	10%	46%	64%	14%	22%		
Tyne Tees	25%	52%	23%	43%	57%	14%	34%	10%	42%	65%	16%	19%		
UTV	39%	36%	25%	50%	50%	16%	29%	21%	34%	38%	62%	0%		
Grampian	33%	45%	22%	43%	57%	17%	29%	16%	38%	65%	9%	26%		
Border (Scotland)	27%	36%	37%	41%	59%	20%	27%	19%	34%	11%	44%	45%		
STV	32%	35%	33%	39%	61%	14%	29%	15%	42%	74%	15%	11%		
HTV Wales	33%	37%	29%	43%	57%	19%	27%	15%	40%	51%	24%	25%		

WEIGHTED	15-34	35-54	55+	Males		Females		AB	C1	C2	DE	Urban	Small Town	Village/ Hamlet
				Males	Females									
London	39%	33%	28%	47%	53%	26%	33%	11%	29%	90%	5%	5%		
Anglia	33%	37%	30%	51%	49%	25%	30%	16%	29%	70%	15%	15%		
Central	31%	36%	32%	49%	51%	21%	27%	18%	34%	90%	5%	5%		
HTV West	29%	36%	36%	49%	51%	24%	30%	15%	30%	70%	15%	15%		
Meridan	29%	36%	35%	50%	50%	28%	32%	13%	27%	70%	15%	15%		
West Country	26%	32%	42%	48%	52%	20%	32%	17%	31%	50%	25%	25%		
Granada	33%	35%	31%	48%	52%	18%	29%	16%	37%	88%	5%	7%		
Yorkshire	31%	37%	33%	50%	50%	18%	27%	18%	37%	70%	15%	14%		
Border (England)	24%	38%	39%	51%	49%	21%	29%	17%	33%	30%	20%	50%		
Tyne Tees	29%	36%	35%	51%	49%	19%	26%	15%	40%	70%	15%	15%		
UTV	42%	31%	27%	50%	50%	17%	28%	22%	33%	70%	30%	0%		
Grampian	27%	37%	36%	48%	52%	18%	26%	18%	37%	40%	19%	40%		
Border (Scotland)	26%	35%	40%	46%	54%	16%	26%	16%	42%	20%	30%	50%		
STV	33%	34%	33%	49%	51%	19%	23%	13%	44%	81%	9%	10%		
HTV Wales	30%	34%	35%	48%	52%	18%	29%	16%	37%	60%	20%	20%		

TV platform targets, achieved and weighted sample:

TV Platform	TARGET	ACHIEVED	WEIGHTED
Only the main channels (BBC One, BBC Two, ITV1, Channel 4 and Five)	12%	9%	9%
Cable TV (through NTL / Telewest / Virgin Media)	14%	15%	16%
Satellite TV (Sky)	37%	42%	40%
Satellite TV (Other)			
Freeview (through a set-top box or digital television set) with ONLY free channels			
Freeview (through a set-top box or digital television set) with free channels PLUS top-up channels such as Cartoon Network or the Discovery channel	37%	33%	34%
Digital TV via a broadband DSL line (from HomeChoice or BT)			
Other (please write in and code 8)	0%	1%	1%

Nation Regional Weighting Targets		
London	10,495,204	19%
Anglia	4,132,601	7%
Central	8,031,583	14%
ITVWest	2,142,408	4%
Meridian	6,526,258	12%
Westcountry	1,540,454	3%
Granada	6,505,486	11%
Yorkshire	5,801,387	10%
Border (England)	489,545	1%
Tyne-Tees	3,051,544	5%
UTV	1,223,710	2%
Grampian	837,994	1%
Border (Scotland)	102,552	0%
STV	3,246,515	6%
ITV Wales	2,562,869	5%

APPENDIX B – Social Group Definition

S4 What is the occupation of the main income earner in your household, that is the person with the highest income, whether from employment, self-employment, a pension or Government benefits?

Professional (doctors, lawyers, architects, etc.).....	(A)
Senior Management.....	(A)
Senior Civil Servant.....	(A)
Middle Management.....	(B)
Executive.....	(B)
Local Government Officer	(B)
Civil Service Officer.....	(B)
Education	(B)
Services/Military	(C1)
Junior management	(C1)
Owner of small establishment.....	(C1)
Clerical/office worker (including customer services etc).....	(C1)
Supervisor.....	(C1)
Skilled manual (plumbers, electricians etc.).....	(C2)
Semi-skilled manual (including security work, driver, carer etc)	(C2)
Un-skilled manual (including retail, sales assistant etc)	(D)
Apprentice.....	(D)
Unemployed.....	(E)
Retired and reliant on state pension	(E)
Self employed	(D)
Housewife/househusband.....	(E)
Student.....	(E)
Unable to work	(E)

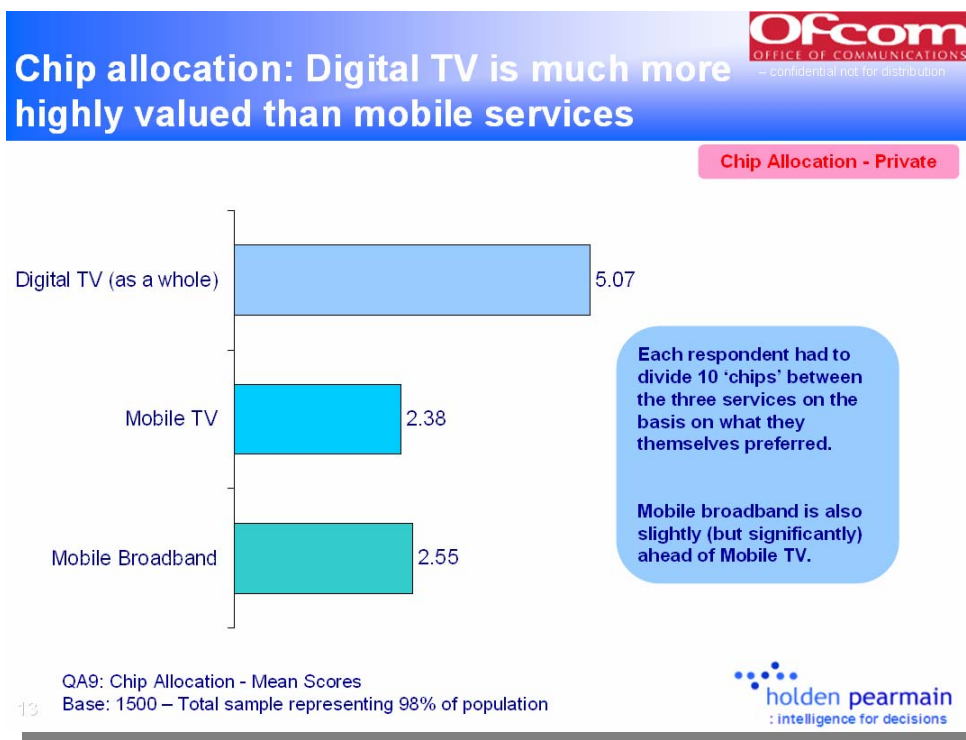
APPENDIX C – Chip Allocation and Max Diff

CHIP ALLOCATION

The chip allocation exercise is useful to identify the relative importance of factors in influencing a decision or more simply to determine how importance one thing is in relation to another.

Here, respondents are provided with chips or points and asked to allocate them across a number of items to illustrate the relative importance they place on these items.

From this information, we can easily determine if one item is twice as important as another or half as important as another item. An example is provided below from a study previously conducted for Ofcom.



In the example above, at the total sample level, we can say that Digital TV is approximately twice as important as Mobile TV and Mobile Broadband, which are of similar importance to each other.

MAXIMUM DIFFERENTIATION ('MAX DIFF')

The 'Max Diff' Survey Approach

We use the 'Max Diff' technique primarily to determine the rank order of stated importance. However, this sophisticated choice technique derives sensitive measures not only of rank order but also the 'distance' between items.

Maximum Difference Scaling (Max Diff) is ideal for assessing the relative appeal of competing items, giving both the order and the magnitude of importance. It is not subject to the shortfalls of rating and ranking scales, where both can struggle to differentiate between certain attributes, particularly those not in the top 2 or 3.

Respondents are shown a series of claims in groups of four or five at a time, and asked to indicate which is most appealing in that group, and which is least appealing. They each see a number of these groups, and in this way we build up a picture of the importance of the attributes relative to each other.

An example of a Max Diff question is shown below:

Which of the following do you consider most appealing and which is the least?

Least appealing		Most appealing
<input checked="" type="checkbox"/>	Design B	<input type="checkbox"/>
<input type="checkbox"/>	Design D	<input type="checkbox"/>
<input type="checkbox"/>	Design G	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Design A	<input type="checkbox"/>

Typically, each respondent sees some 5-10 such choices groups, and from this we build a statistical model that indicates the relative stated appeal of each design.

Strength and Order of Preference

For the analysis of the Max Diff questions, we use specialist statistical software, based on hierarchical Bayesian analysis, to estimate the relative strength of preference for each design and for each respondent. With this information we can then establish, for any group of respondents, the rank order and 'distance' between designs, as illustrated below.

