

PSB Annual Research Report 2017

PSB audience opinions annex

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Background

PSB tracker overview

- Ofcom developed a range of PSB purposes and characteristics in its first PSB review in 2005*, based on the public service purposes presented in the 2003 Communications Act. The PSB channels (BBC One, BBC Two, BBC Three, BBC Four, ITV1, Channel 4, Channel 5, BBC News, S4C and BBC Alba) are expected together to fulfil the purposes and characteristics, although it is also acknowledged that each PSB channel has a specific remit.
- The PSB tracker asks respondents to rate specific TV channels on each of the PSB purposes and characteristics relevant to that channel.
- The PSB purposes and characteristics were put into everyday language for the PSB Tracker survey, which asked respondents to give their opinions on the PSB statements, both in terms of their importance, and their delivery by the PSB channels (see slides below).
- Regular viewers of each channel were asked to rate the channel on the statements, using a ten-point scale. Within this report a rating of 7, 8, 9 or 10 has been taken as a positive response, indicating that a viewer sees the channel/channels as delivering against this purpose/characteristic.
- The survey reports the opinions of self-defined 'regular viewers' of each PSB channel, on the delivery of that channel's PSB purposes and characteristics. We focus on regular viewers in order to minimise the effect of hearsay and perception, and we use self-definition as a 'regular viewer' (rather than the number of hours viewed) because viewers' opinions on a channel can be driven by regular viewing of programmes, regardless of how many or few hours this involves.
- Both regular and occasional viewers of each channel were asked to rate the delivery of the purposes and characteristics when thinking about the PSB channels as a whole.
- All respondents were also asked to rate how important it is that the PSB channels together fulfil the PSB purposes and characteristics, again using a -point scale.
- Respondents were asked to rate each channel, all channels combined, rate importance for the first statement, for the second statement, etc.
- We rotated the order of the questions on statements and channels within each section, to prevent order bias.

PSB tracker survey: 2011-2014

- It is important to note that in 2011 (and again in 2015, see next slide) Ofcom changed the methodology for the PSB tracker:
 - A change in sample size from approximately 7000 telephone interviews per year, to 3000
 - The fieldwork moved to continuous research throughout the year, rather than quarterly interviewing
 - An increase in the number of quotas
- The profiles of individual quotas were updated.
- The questionnaire was shortened, focusing on essential questions:
 - Questions on non-PSB digital channels were removed from the questionnaire
 - Some questions relating to the importance and delivery of PSB content online were removed, although respondents still rated their overall opinions of the individual BBC and Channel 4 websites
 - We reduced the number of PSB purposes and characteristics statements against which the PSB channels are measured, from 20 to 14
 - Some of the statements were modified (see methodology document for details)
 - We moved to a 'purer' way of measuring self-defined 'regular viewers'
 - The interview length reduced from 25 to 20 minutes
- The fieldwork was conducted by BDRC Continental.

PSB tracker survey, 2015 onwards: methodology change

- In 2015 Ofcom changed the methodology for the tracker:
 - Until 2014, the PSB tracker was conducted via CATI telephone methodology. In 2015 the decision was made to transition it to a dual method with online and CAPI face-to-face (F2F) data collection
 - The sample was split 75% online / 25% F2F, with proportional quotas applied to each method
 - A smaller sample of telephone interviews (CATI) was also conducted in 2015, using the previous methodology, to enable recalibration and reporting of historic (pre-2015) data.
 - A discriminant analysis was conducted to establish the best weighting regime for the combined online and F2F data, to ensure it was representative.
 - Fieldwork moved to two discrete waves, rather than continuous research throughout the year
- The questionnaire was shortened, focusing on essential questions:
 - A number of channels were dropped from the children's viewing section
 - BBC News, BBC Alba and S4C were dropped from the questions on regularity and frequency of viewing
 - Channel 5 was dropped from the question on individual channel ratings
 - A question on use of www.s4c.co.uk was removed
 - Separate questions on incidence and frequency of using each catch-up service were combined into one question.
 - The question on ethnicity was changed to align it with that used in the census, separating it into two questions: one on national identity and a second for ethnic group.
 - Overall reduction in interview length from 20 to 15 minutes.
- The fieldwork was conducted by BDRC Continental.

PSB tracker survey, 2015 onwards: changes over time

- So that historic results could be reported, they were calibrated to be comparable with the 2015 data collection method and results.
- Throughout this document, only statistically significant differences will be reported in the text and highlighted in the charts. Reported differences between sub-groups in 2016 are statistically significant at the 95% level to accommodate the impact of sample design and weighting. This means that there is a high level of confidence that any reported differences reflect a true attitudinal or behavioural change rather than being caused by a change in sample methodology or profile.
- Due to the re-weighting of historic data, statistically significant differences for results before 2015 are not shown. Changes between 2015 and 2016 are marked as statistically significant at the 99% level.

Overview of PSB television

Overview of PSB

This section gives a broad overview of claimed regular viewing among the UK population, and the importance and delivery of all the PSB purposes and characteristics. All respondents claiming to watch at least one PSB channel regularly were asked to rate the importance of the characteristics and purposes. Respondents claiming to watch any of the PSB channels were asked to rate how well the channels delivered on the purposes and characteristics of PSB. They were also asked how well individual PSB channels delivered on the purposes and characteristics of the specific channel (see figures 29-34 for more information).

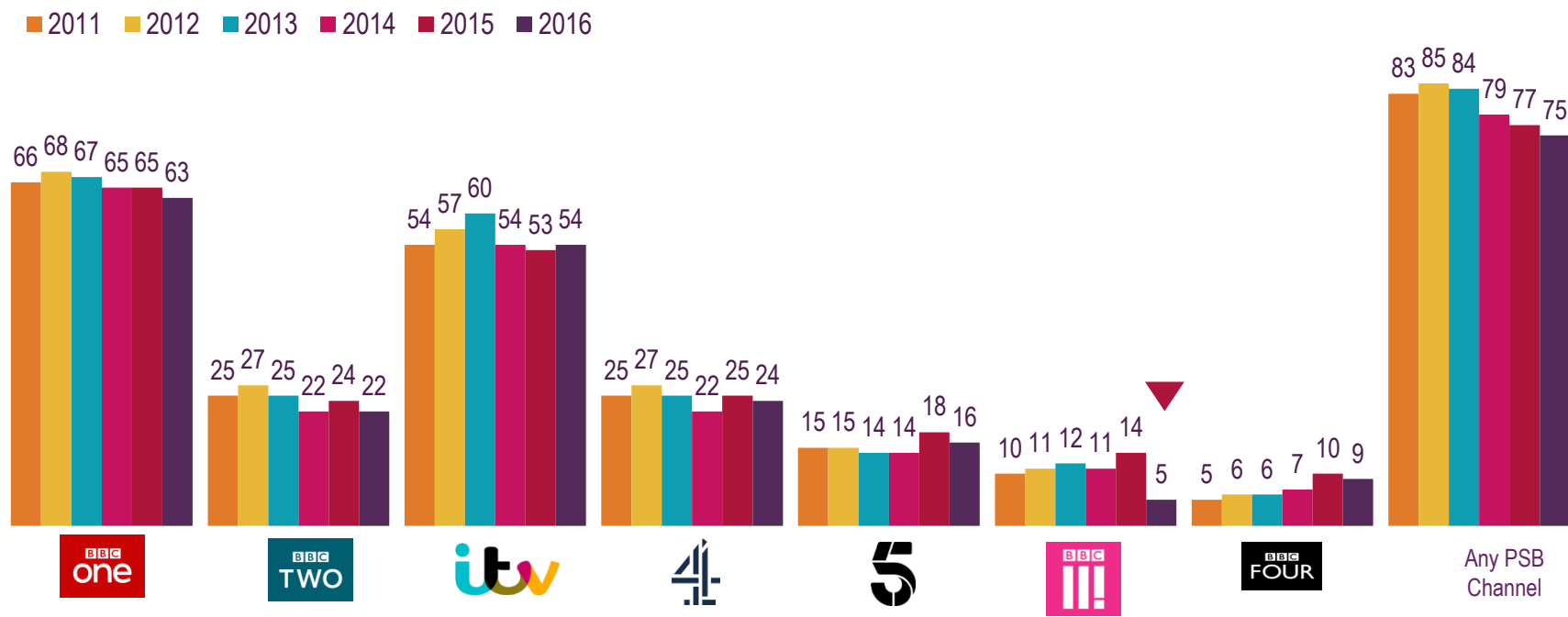
Importance

- Across all purposes (except purpose 2), there were significant increases since 2015, with the exception of *'Its programmes help me understand what's going on in the world today'* (from purpose 1) and *'It shows different parts of the UK, including England, Northern Ireland, Scotland and Wales'* (from purpose 4).
- The single most important purpose was purpose 1 – *'Informing our understanding of the world'*, with all three statements scoring higher than those for any other purpose. Results for this purpose ranged from 85% up to 89% (for *'Its news programmes are trustworthy'*).
- Purposes 3 and 4 had the least important statements, with 73% rating *'It shows high quality soaps or dramas made in the UK'* (from purpose 3) and 74% rating *'Its programmes show different kinds of cultures within the UK'* (from purpose 4) as important.
- The most important statement for purpose 3 was *'It portrays my region/Scotland/Wales/Northern Ireland fairly to the rest of the UK'*, which scored 83%.
- Respondents' perception of the importance of characteristics varied from 90% (for *'It shows well-made, high-quality programmes'*) to 68% (for *'The style of the programmes is different to what I'd expect to see on other channels'*).

Delivery

- Like the ratings for importance, delivery ratings also increased significantly since 2015, with the exception of *'Its programmes help me understand what's going on in the world today'* and *'It shows high quality soaps or dramas made in the UK'*.
- The highest ratings for delivery were for purpose 1: *'Its programmes help me understand what's going on in the world today'* (77%). This was higher than the other purpose 1 statements (both 75%).
- All purposes (apart from children's PSB measures) scored significantly higher for importance than delivery, for the PSB channels combined. The largest difference was for responses to *'It portrays my region/ Scotland/ Northern Ireland/ Wales fairly to the rest of the UK'* (83% to 63%).
- There was a similar trend for characteristics, with importance scoring higher than delivery for all measures. This is most visible for the statements *'It shows programmes with new ideas and different approaches'* (78% to 67%).

Fig 1 Proportion of UK sample who are self-defined ‘regular viewers’










▼ Shows significant decrease between 2015 and 2016 (at 99% level).

Self-defined regular viewing of each channel.

Base: All respondents (3109, 3025, 3028, 3158, 3653, 3364)

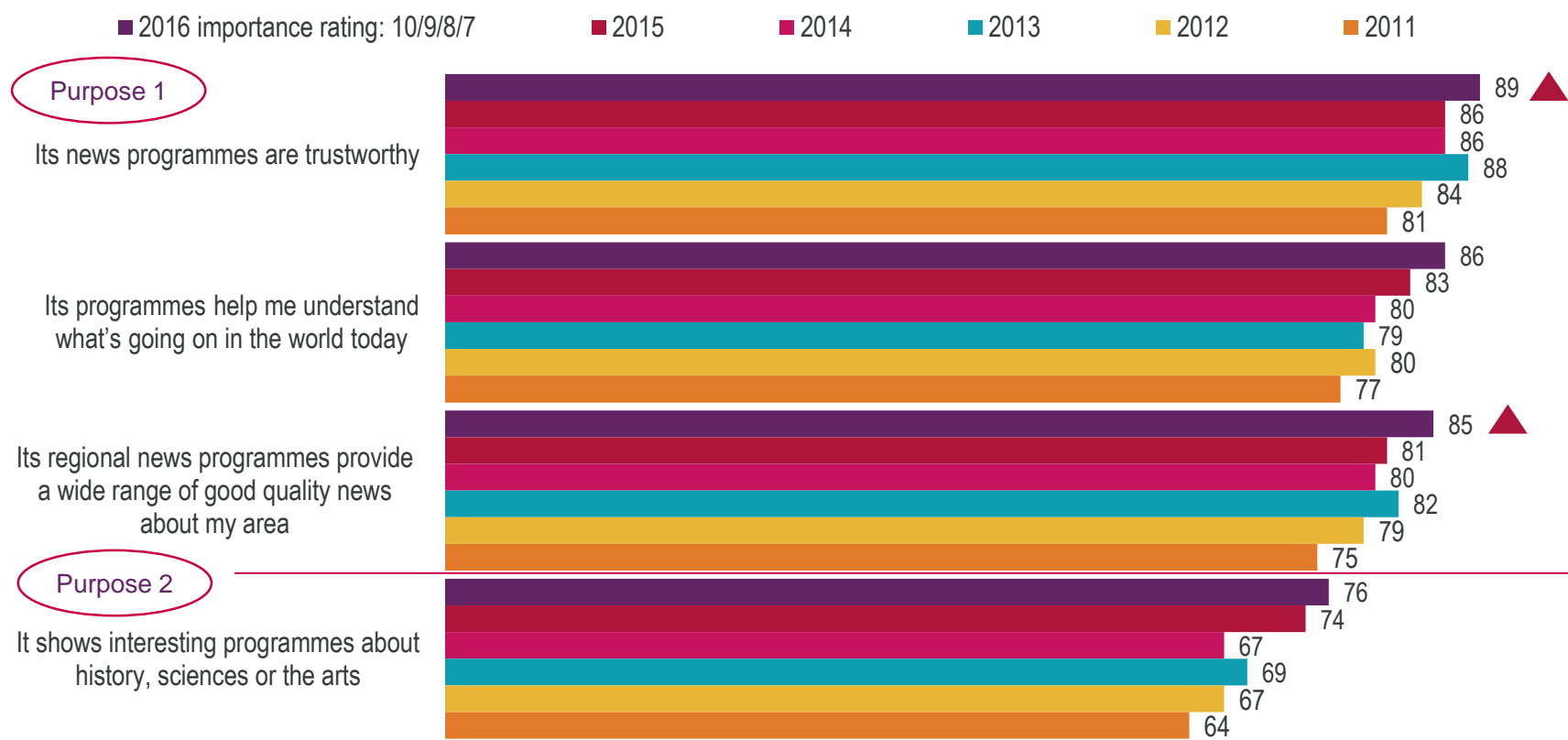
Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 2 Proportion of sample who are self-defined regular viewers of each channel, within sub-groups

								Any PSB channel
Total regular viewers (% of Total)	63	22	54	24	16	5	9	75
Male	63	25	51	21	14	5	10	72
Female	63	18	58	26	19	6	8	77
16-24	44	8	45	27	11	13	2	62
25-34	50	13	48	27	22	9	7	69
35-44	59	19	54	28	18	5	8	71
45-54	69	23	55	24	17	3	10	77
55-64	70	33	54	20	16	1	10	78
65+	81	32	65	17	15	2	13	88
AB	69	31	49	21	14	5	13	77
C1C2	63	21	54	25	16	5	8	75
DE	59	16	58	23	19	5	7	73
England	63	22	54	24	16	5	9	75
Scotland	67	19	54	24	21	5	9	78
Wales	60	25	47	20	18	4	8	70
N Ireland	70	14	70	25	14	1	5	81
White	65	23	56	24	17	5	9	77
MEG	48	11	39	22	16	8	7	58

Base: All respondents in each demographic group

Fig 3 The importance of PSB purposes 1 and 2



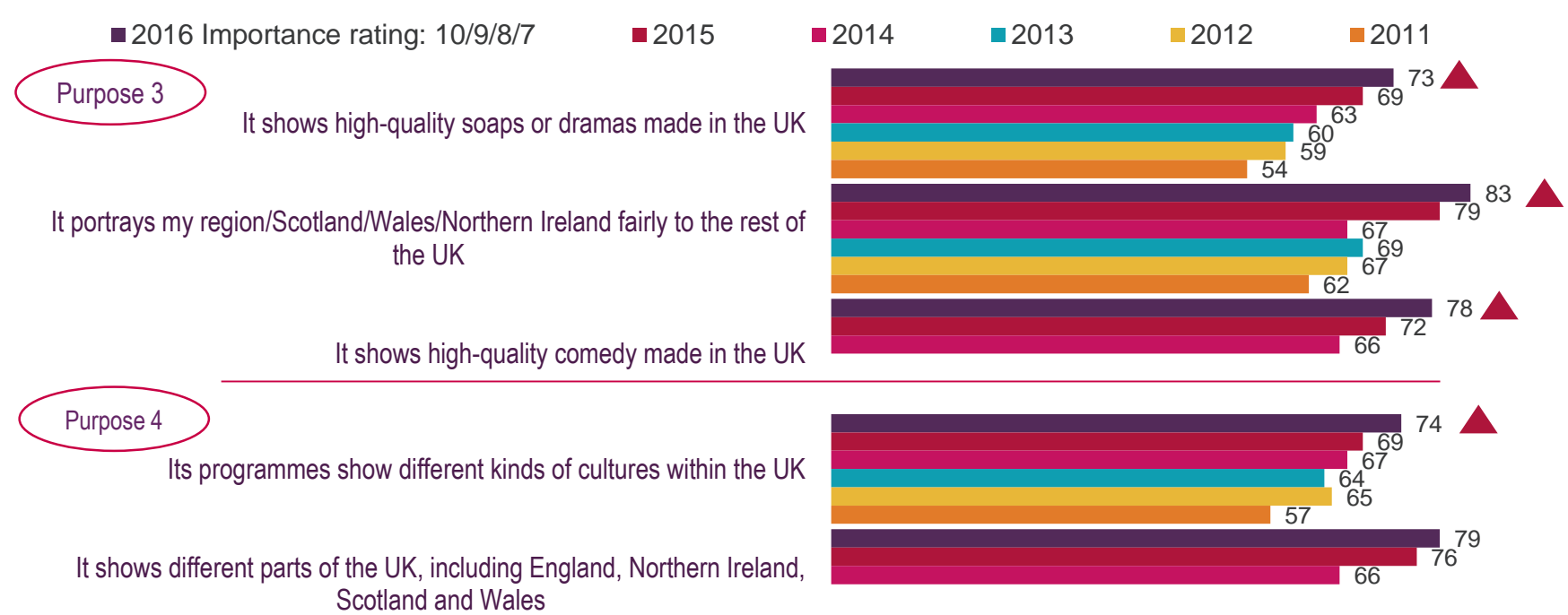
▲ = 99% statistically significant increase from 2015 to 2016

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

Base: All respondents (2011 = 3109, 2012 = 3025, 2013 = 3028, 2014 = 3158, 2015 = 3653, 2016=3364)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 4 The importance of PSB purposes 3 and 4



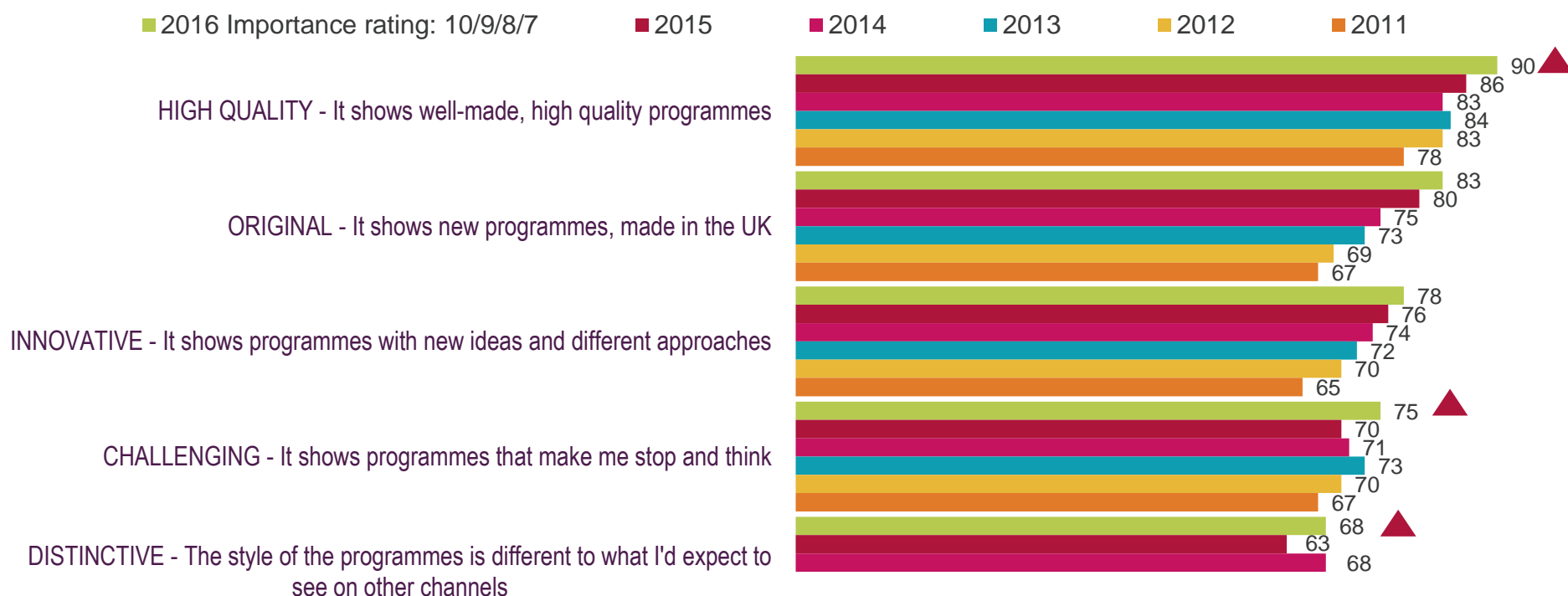
▲ = 99% statistically significant increase from 2015 to 2016

Extent to which the purpose is important, where 10 means ‘extremely important’ and 1 means ‘not at all important’

Base: All respondents (2011 = 3109, 2012 = 3025, 2013 = 3028, 2014 = 3158, 2015 = 3653, 2016=3364)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 5 The importance of PSB characteristics



▲ = 99% statistically significant decrease / increase from 2015 to 2016

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

Base: All respondents (2011 = 3109, 2012 = 3025, 2013 = 3028, 2014 = 3158, 2015 = 3653, 2016=3364)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 6 The delivery of PSB purposes 1 and 2



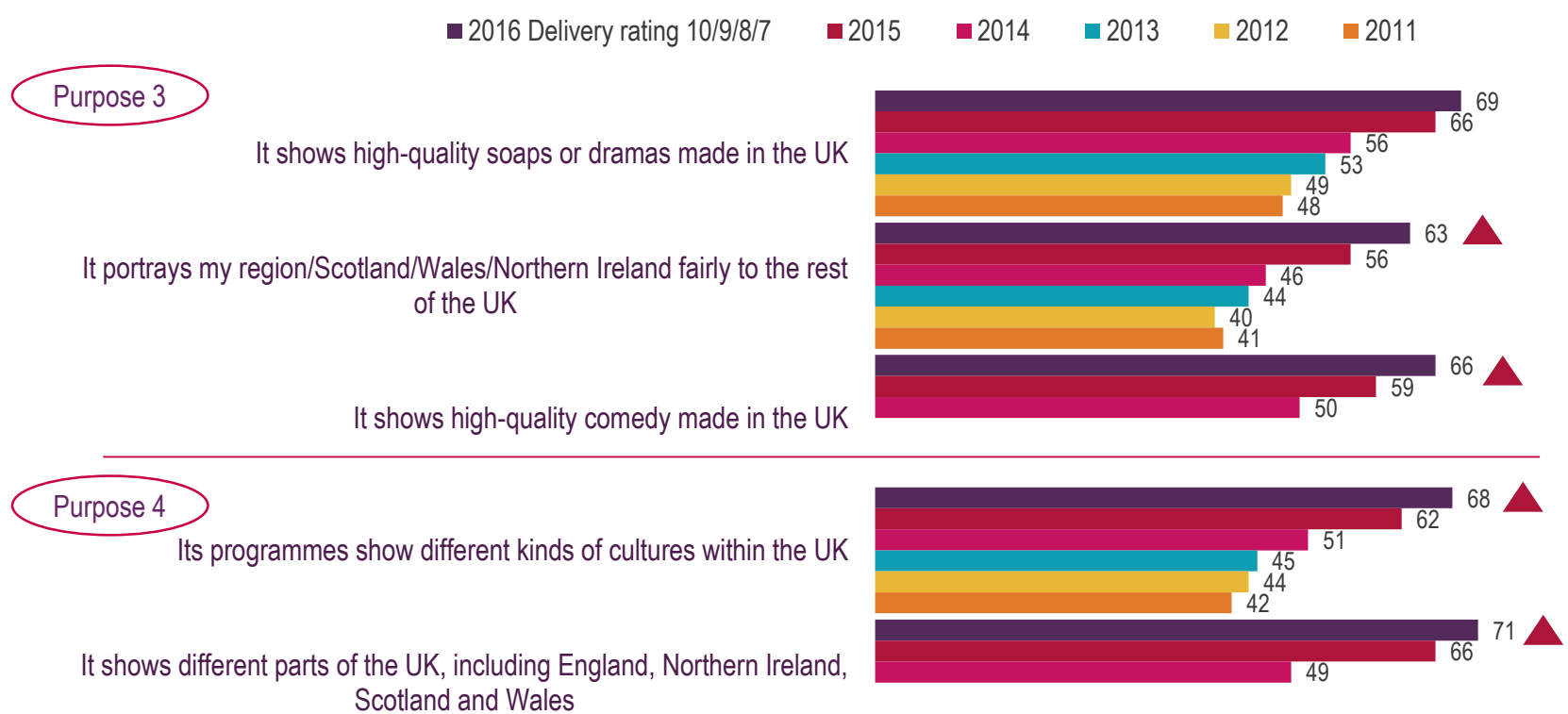
▲ = 99% statistically significant increase from 2015 to 2016

Extent to which the channels together deliver on the purpose, where 10 is the highest score and 1 is the lowest.

Base: All respondents who watch any PSB channels regularly or occasionally. All channels combined (2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3067, 2015 = 3606, 2016=3315)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 7 The delivery of PSB purposes 3 and 4



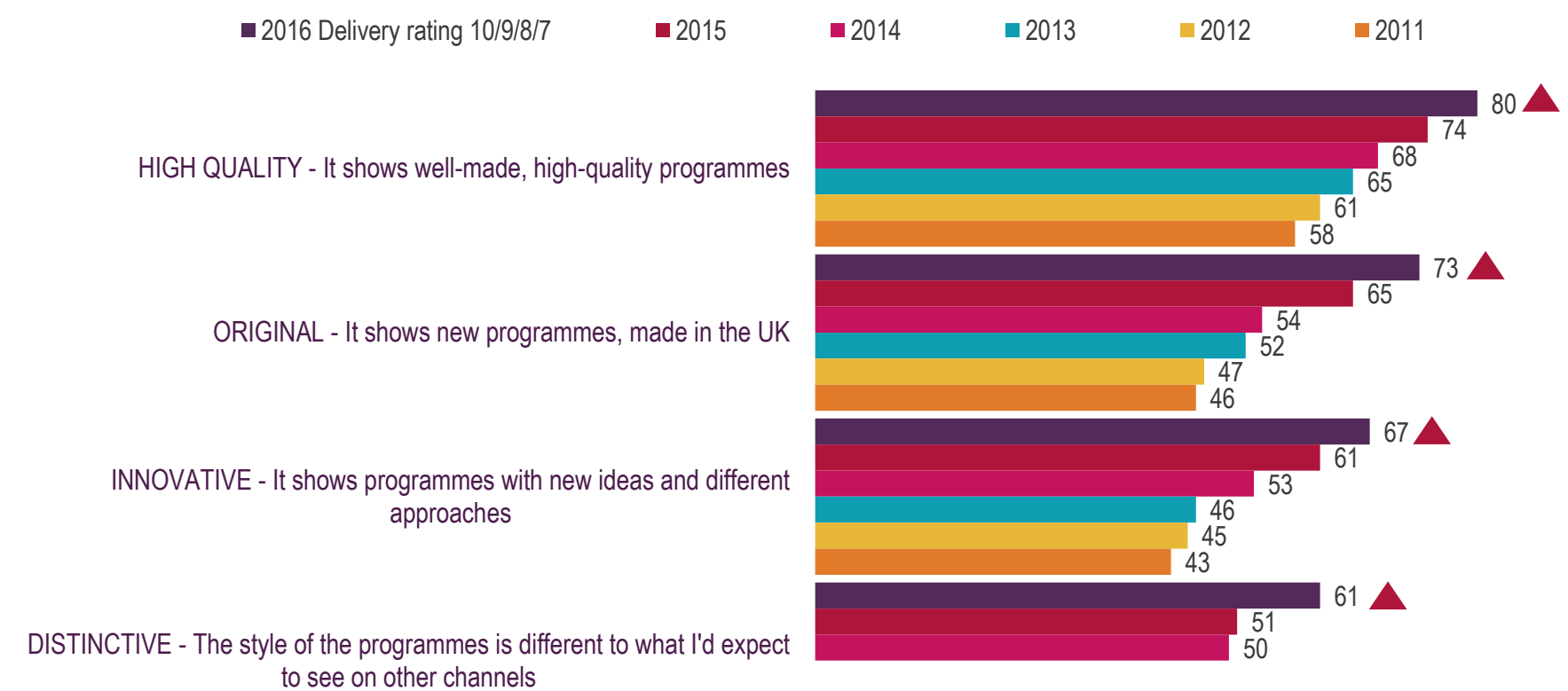
▲ = 99% statistically significant increase from 2015 to 2016

Extent to which the channels together deliver on the purpose, where 10 is the highest score and 1 is the lowest.

Base: All respondents who watch any PSB channels regularly or occasionally. All channels combined (2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3067, 2015 = 3606, 2016=3315)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 8 The delivery of PSB characteristics



▲ = 99% statistically significant increase from 2015 to 2016

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

Base: All respondents who watch any PSB channels regularly or occasionally. All channels combined (2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3067, 2015 = 3606, 2016=3315)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 9: Importance and delivery of PSB purposes: 2011-2016

Purpose	Statement	Metric	2011	2012	2013	2014	2015	2016	
Purpose 1 – Informing our understanding of the world	Its news programmes are trustworthy	Importance	81%	84%	88%	86%	86%	89%	↑
		Delivery	62%	64%	66%	67%	70%	75%	↑
	Its programmes help me understand what's going on in the world today	Importance	77%	80%	79%	80%	83%	86%	
		Delivery	60%	58%	62%	65%	74%	77%	
	Its regional news programmes provide a wide range of good quality news about my area	Importance	75%	79%	82%	80%	81%	85%	↑
		Delivery	57%	61%	64%	66%	70%	75%	↑
Purpose 2 – Stimulating knowledge and learning	It shows interesting programmes about history, sciences or the arts	Importance	64%	67%	69%	67%	74%	76%	
		Delivery	45%	48%	50%	53%	62%	67%	↑
Purpose 3 – Reflecting UK cultural identity	It portrays my region/Scotland/Northern Ireland/Wales fairly to the rest of the UK	Importance	62%	67%	69%	67%	79%	83%	↑
		Delivery	41%	40%	44%	46%	56%	63%	↑
	It shows high quality soaps/dramas made in the UK	Importance	54%	59%	60%	63%	69%	73%	↑
		Delivery	48%	49%	53%	56%	66%	69%	
	It shows high quality comedy made in the UK	Importance	Not asked			66%	72%	78%	↑
		Delivery				50%	59%	66%	↑
Purpose 4 – Representing diversity and alternative viewpoints	Its programmes show different kinds of cultures within the UK	Importance	57%	65%	64%	67%	69%	74%	↑
		Delivery	42%	44%	45%	51%	62%	68%	↑
	It shows different parts of the UK including England, NI, Scotland and Wales	Importance	Not asked			66%	76%	79%	
		Delivery				49%	66%	71%	↑
	It provides a wide range of high quality and UK made programmes for children*	Importance	79%	78%	85%	80%	88%	89%	
		Delivery	61%	61%	69%	74%	85%	87%	

↑ Significantly higher than 2015

↓ Significantly lower than 2015

Summary % of respondents rating importance/delivery 10/9/8/7. Base for Importance: All (in 2015 n = 3364); base for delivery: All respondents who watch any PSB channels regularly or occasionally (in 2016 n = 3315). *All whose children regularly watch any of these channels (in 2016): CBeebies, CBBC.

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 10: Importance and delivery of PSB characteristics: 2011-2016

Characteristic	Statement	Metric	2011	2012	2013	2014	2015	2016	
High quality	It shows well-made high quality programmes	Importance	78%	83%	84%	83%	86%	90%	↑
		Delivery	58%	61%	65%	68%	74%	80%	↑
Challenging	It shows programmes that make me stop and think	Importance	67%	70%	73%	71%	70%	75%	↑
Original	It shows new programmes made in the UK	Importance	67%	69%	73%	75%	80%	83%	
		Delivery	46%	47%	52%	54%	65%	73%	↑
Innovative	It shows programmes with new ideas and different approaches	Importance	65%	70%	72%	74%	76%	78%	
		Delivery	43%	45%	46%	53%	61%	67%	↑
Distinctiveness	The style of programmes is different to what I'd expect to see on other channels	Importance	Not asked			68%	63%	68%	↑
		Delivery				50%	51%	61%	↑

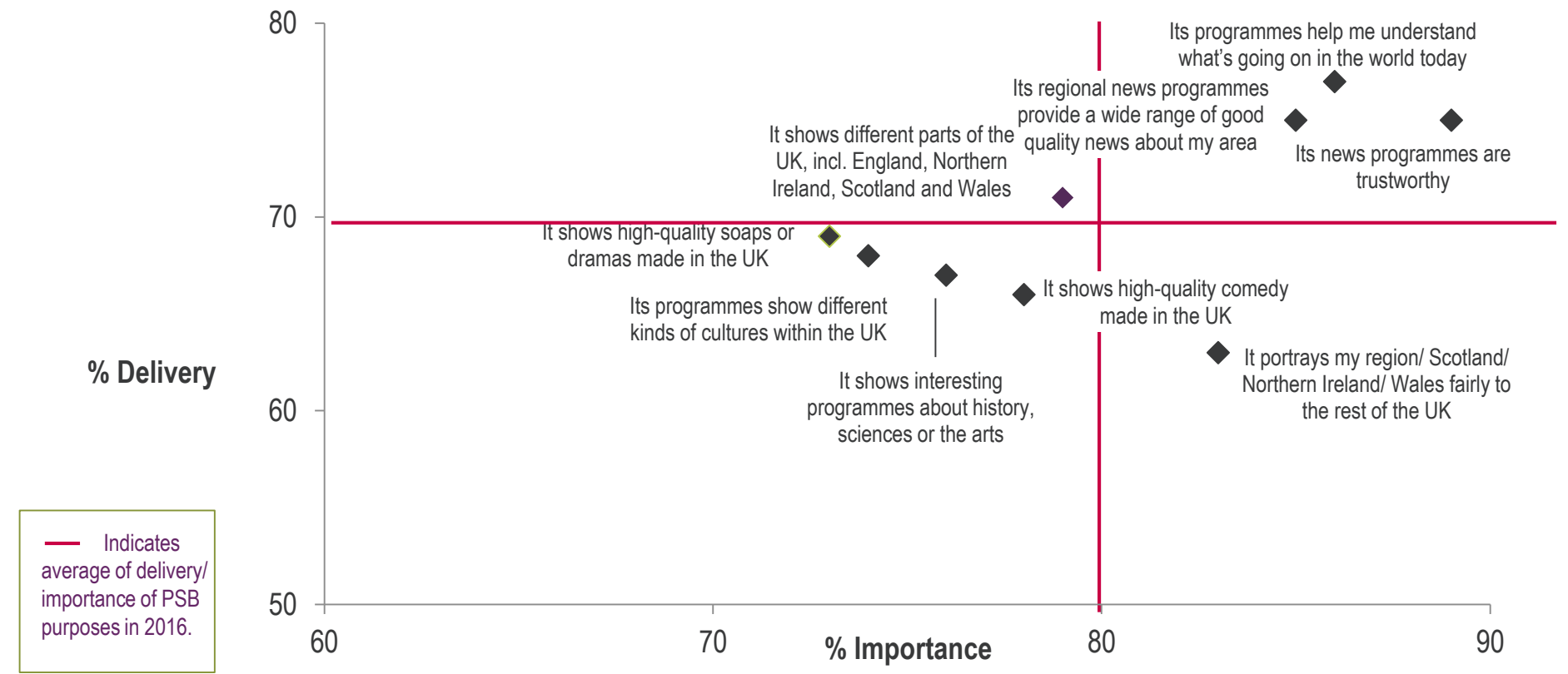
↑ Significantly higher than 2015

↓ Significantly lower than 2015

Summary % of respondents rating importance/delivery 10/9/8/7. Base for Importance: All (in 2016 n = 3364); base for delivery: All respondents who watch any PSB channels regularly or occasionally (in 2016 n = 3315).

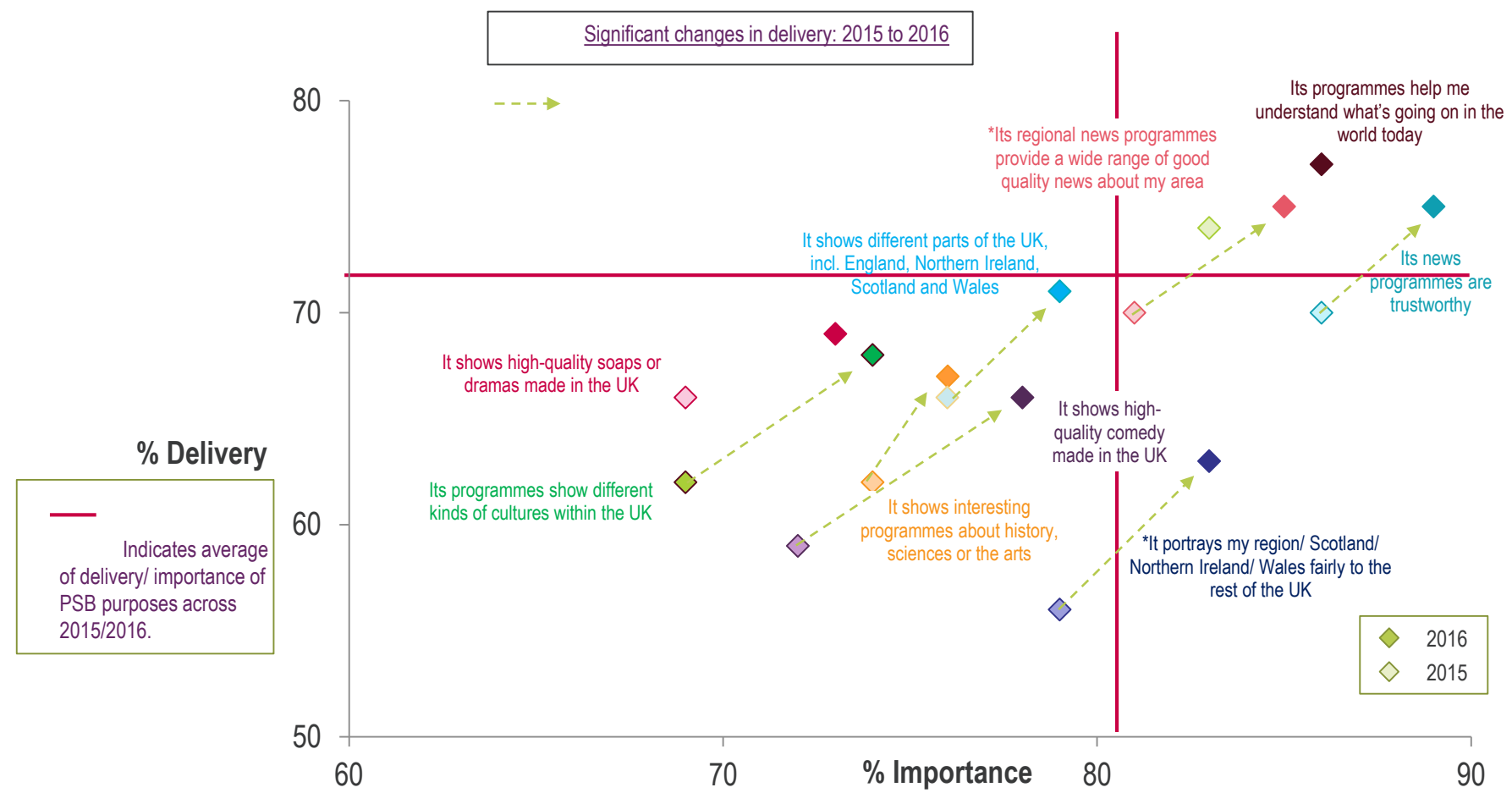
Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 11 Summary of the importance and delivery of PSB purposes: 2016



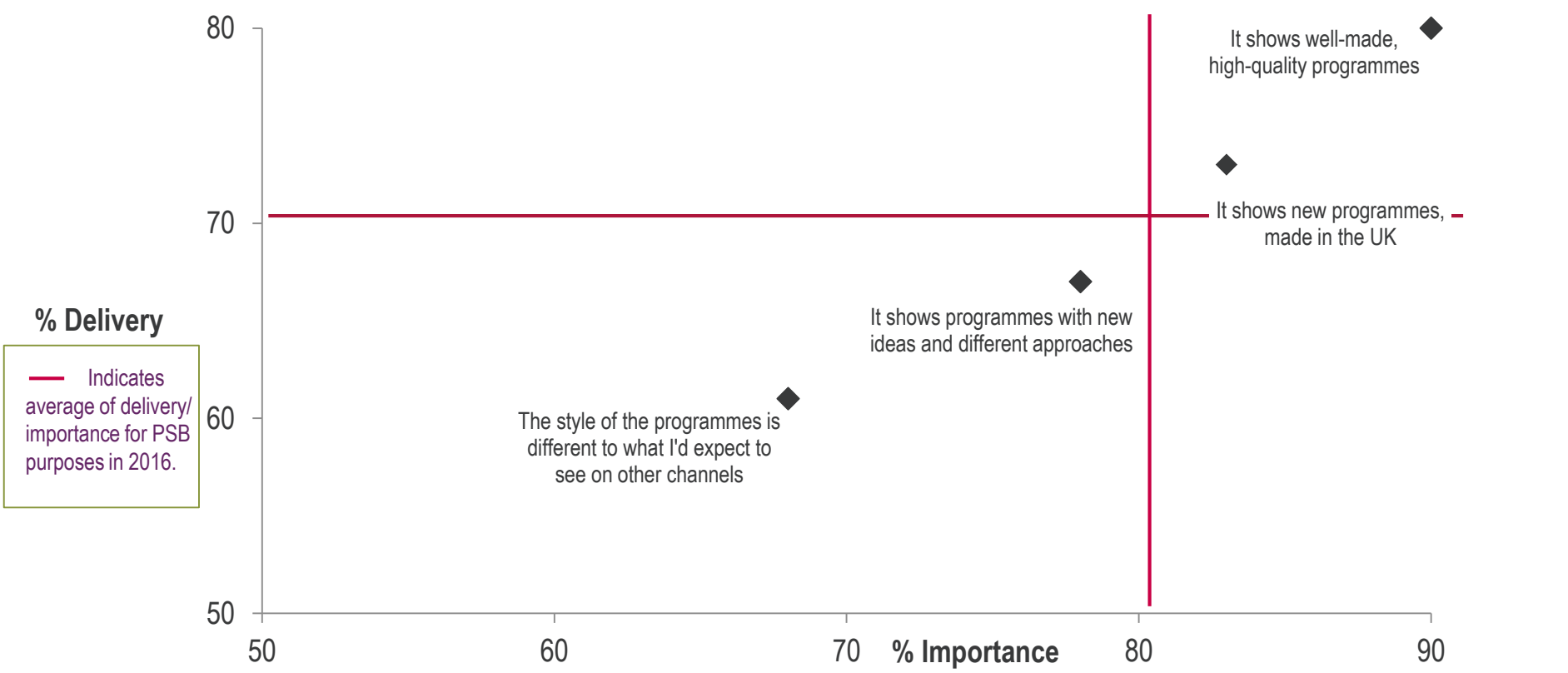
Summary % of respondents rating importance/delivery 10/9/8/7
Base for importance: all (3364); base for delivery: All respondents who watch any PSB channels regularly or occasionally (3315)
Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes.

Fig 11b Summary of the importance and delivery of PSB purposes: 2015 vs. 2016



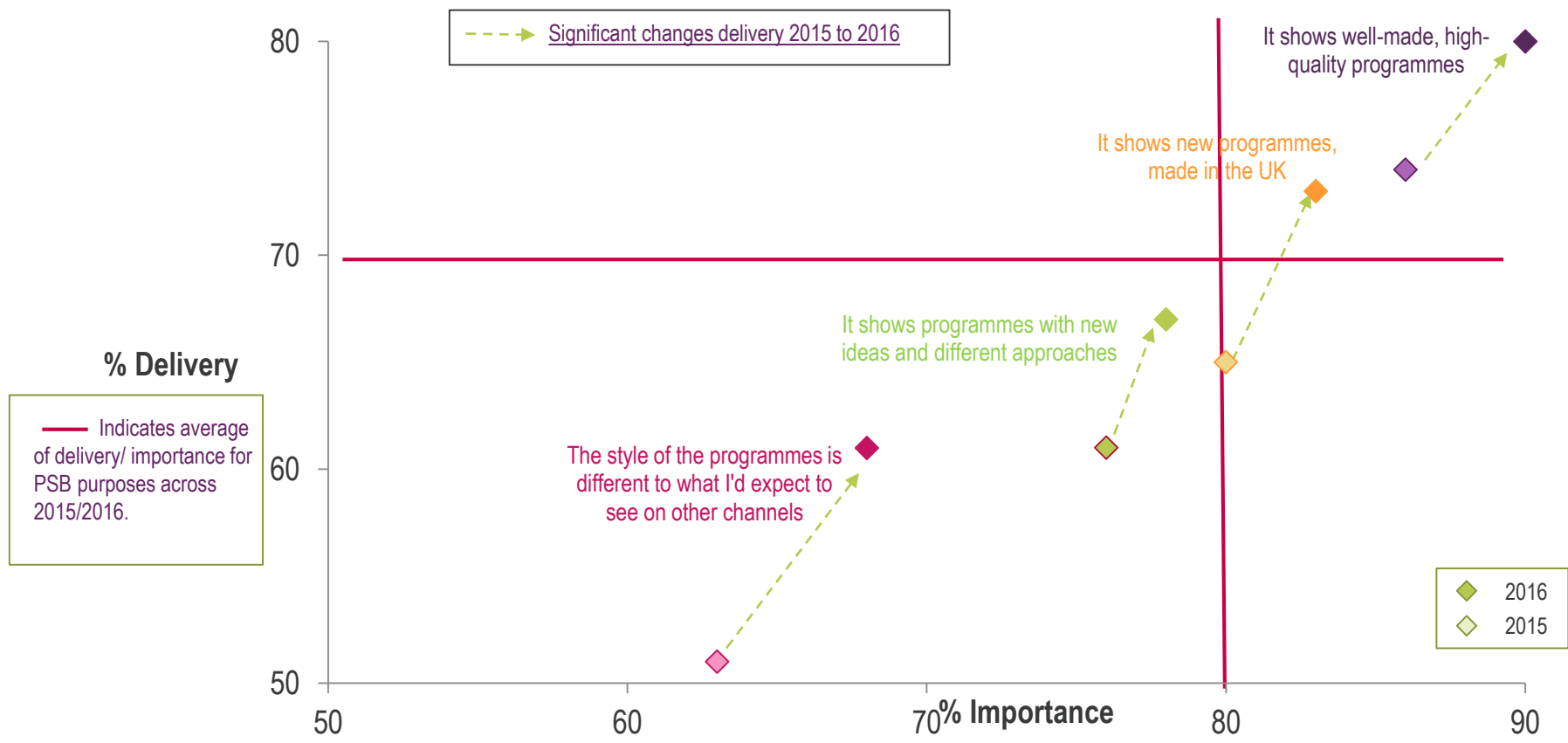
Summary % of respondents rating importance/delivery 10/9/8/7
Base for importance: All (3364); base for delivery: All respondents who watch any PSB channels regularly or occasionally (2015=3606, 2016=3315)
Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes.

Fig 12 Summary of the importance and delivery of PSB characteristics: 2016



Summary % of respondents rating importance/delivery 10/9/8/7
Base for importance: All (3364); base for delivery: All respondents who watch any PSB channels regularly or occasionally (3315)
Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes.

Fig 12b Summary of the importance and delivery of PSB characteristics: 2015 vs. 2016



Summary % of respondents rating importance/delivery 10/9/8/7
Base for importance: all (3364); base for delivery: all respondents who watch any PSB channels regularly or occasionally (2015=3606, 2016=3315)
Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes.

Overall satisfaction with PSB

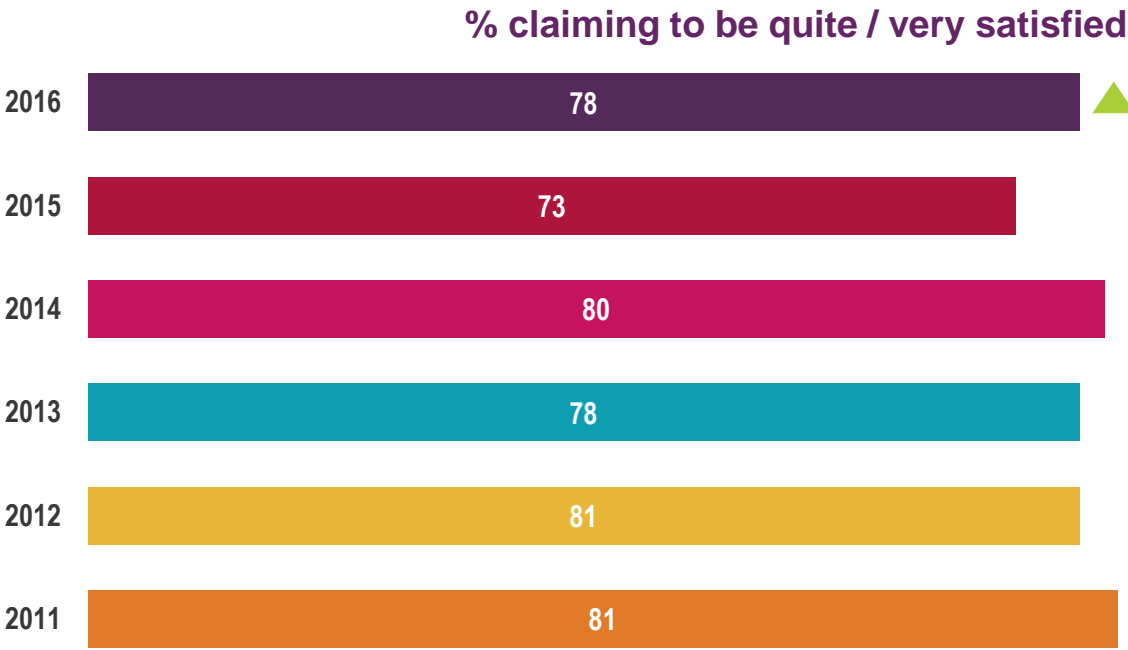
Overall satisfaction with PSB

Respondents were asked to rate how satisfied they were that all of the main PSB channels put together were providing the purposes and characteristics. This section looks at overall satisfaction among the total sample, as well as split by the various demographic sub-groups and by methods of watching TV.

Key themes

- Overall, 78% of regular or occasional viewers to any PSB channel claimed to be either quite or very satisfied with PSB broadcasting, with satisfaction returning to 2014 levels.
- Of the 78% that were satisfied with PSB broadcasting, 24% were very satisfied. In 2015 20% had been very satisfied.
- There were no significant differences by age or socio-economic group.
- 14% said they were more satisfied with PSB compared to one year ago, and 16% said they were less satisfied. These proportions are in line with the levels recorded in 2015.
- Those using TV on demand were the most satisfied by the viewing platform (84% quite or very satisfied).

Fig 13 Overall satisfaction with PSB over time



	Very satisfied	Quite satisfied
2016	24% 	54%
2015	20%	53%

2016 Dissatisfied (Very / Quite) = 6%

 = 99% statistically significant increase from 2015 to 2016

Q And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and 5 - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All respondents who are regular or occasional viewers of any PSB channel (2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3066, 2015 = 3606, 2016=3314)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 are shown.

Fig 14 Overall satisfaction with PSB, by age and socio-economic group



Q And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and 5 - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All who are regular or occasional viewers of any PSB channels (3315)

16-24 (456); 25-34 (539); 35-44 (576); 45-54 (575); 55-64 (495); 65+ (673); AB (781); C1C2 (1708); DE (825)

Fig 15 Overall satisfaction with PSB compared to one year ago



Q Thinking again about these channels combined, the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and 5, do you think you are more satisfied, less satisfied or have the same satisfaction with these as a year ago?

Base: All who are regular or occasional viewers of any PSB channels (3606)

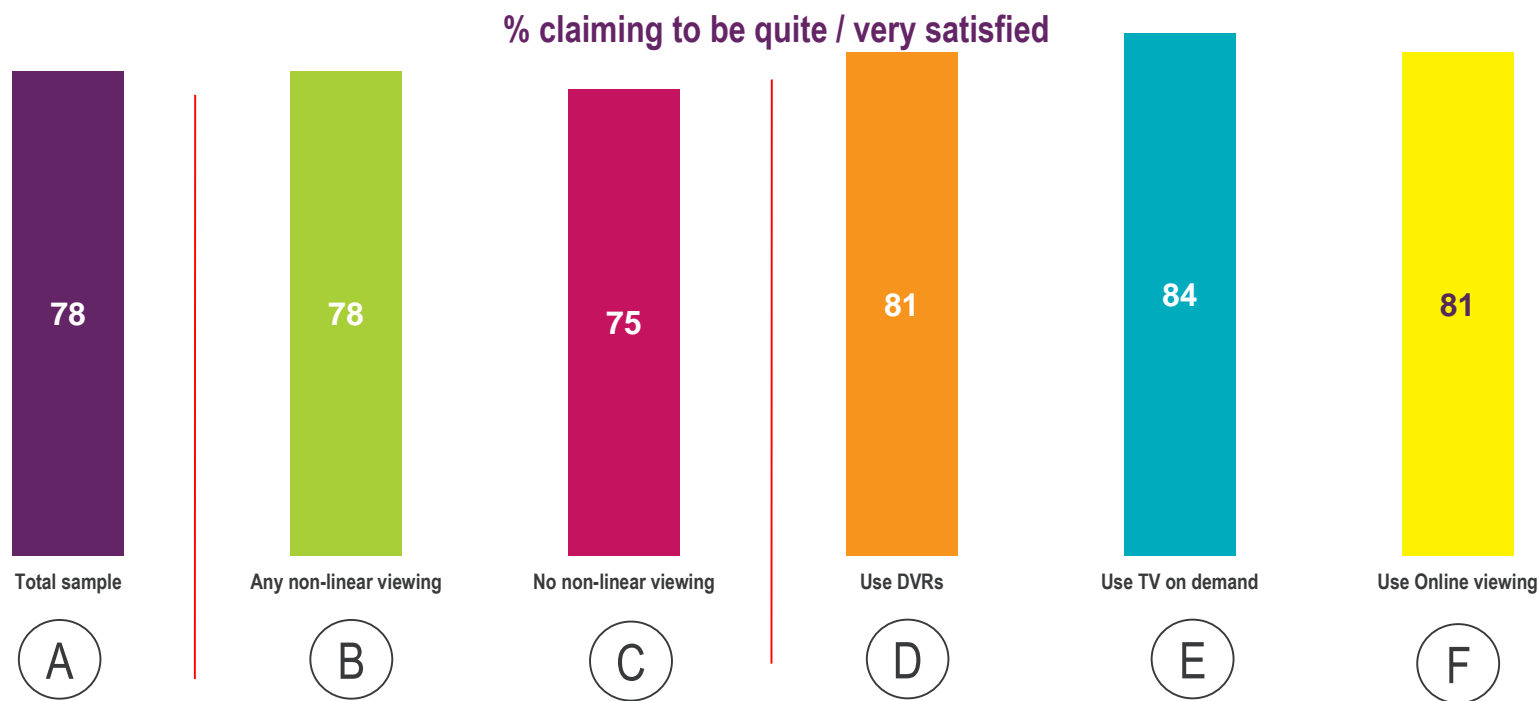
Fig 16 Overall satisfaction with PSB, by viewing platform



Q And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and 5, how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All respondents who are regular or occasional viewers of any PSB channels (3314); Freeview only (709); cable/satellite (2161); use online viewing (219)

Fig 17 Overall satisfaction with PSB, by linear viewing and DVR use



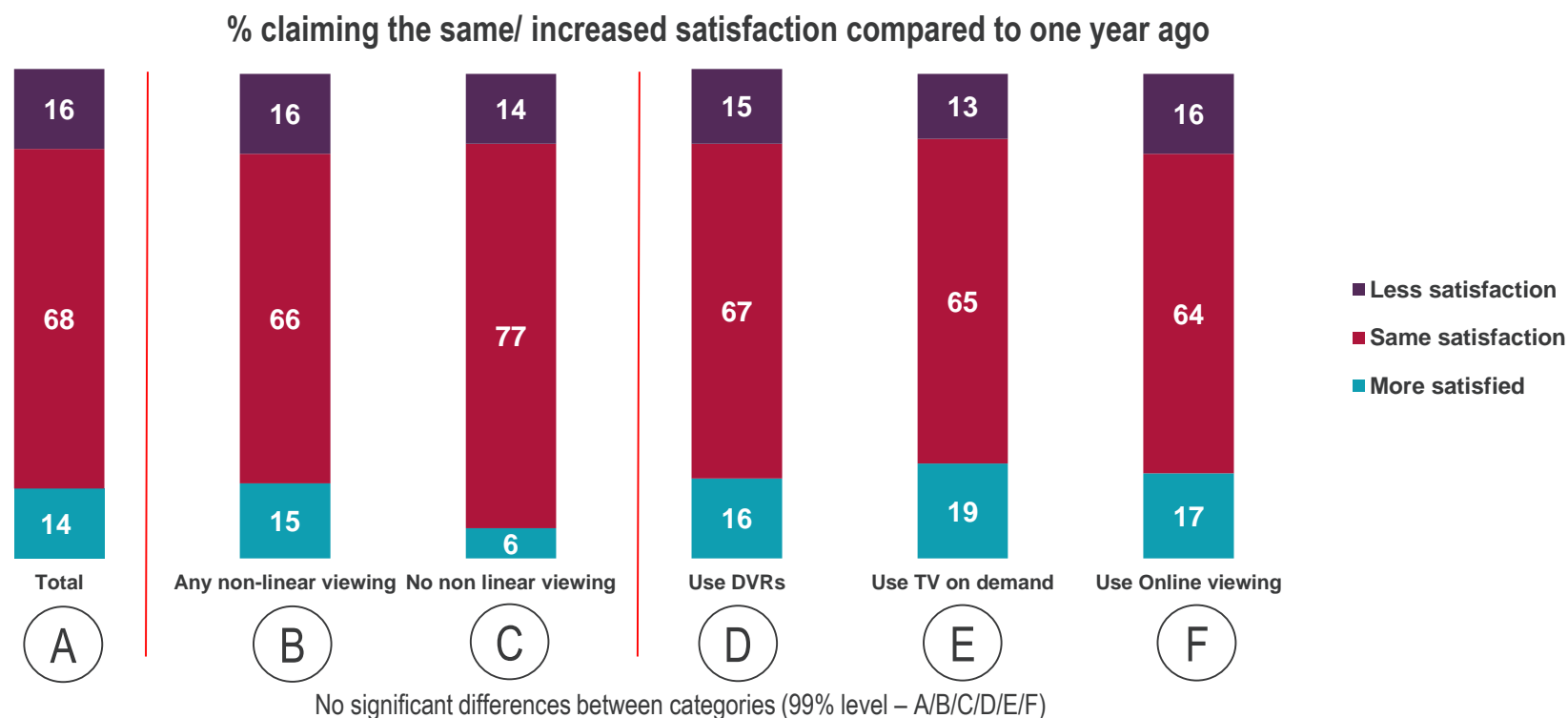
No significant differences between categories (99% level – A/B/C/D/E/F)

Q And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and 5 - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All who are regular or occasional viewers of any PSB channels: total (3314), any non-linear viewing (2996), no non-linear viewing (294), use DVRs (2014), use TV on demand (1297), use online viewing (1797)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 18 Overall satisfaction with PSB compared to one year ago, by linear and non-linear viewing



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

Base: All who are regular or occasional viewers of any PSB channels: total (3314), any non-linear viewing (2996), no non-linear viewing (294), use DVRs (2014), use TV on demand (1297), use online viewing (1797)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

PSB nations' and regions' news

The focus of this section is opinion of PSB nations' / regions' news programming in the UK nations, which is reflected in the statement: *'its regional news programmes provide a wide range of programmes about my area'*.

Key themes

- Views in the nations about the provision of nations' / regions' programming were largely consistent. However...
 - in England, ratings for BBC One and all PSB channels combined for *'its regional news programmes provide a wide range of good quality news about my area'* were significantly higher than in 2015 (72% vs. 78% for BBC One and 70% vs. 76% for all PSB channels combined),
 - while in Northern Ireland, ratings for all PSB channels combined for *'its regional news programmes provide a wide range of good quality news about my area'* were significantly higher than in 2015 (74% vs. 85%).

All PSB channels combined

- This was asked of all regular or occasional viewers of at least one PSB channel. Northern Ireland scored significantly higher than all other nations for rating of delivery of news by PSB channels combined, and England was significantly higher than Wales.
- There were differences between ratings of delivery for 'portraying my region fairly to the rest of the country'; England and Scotland (64% and 66%) were significantly higher than Wales and Northern Ireland (48% and 50%).

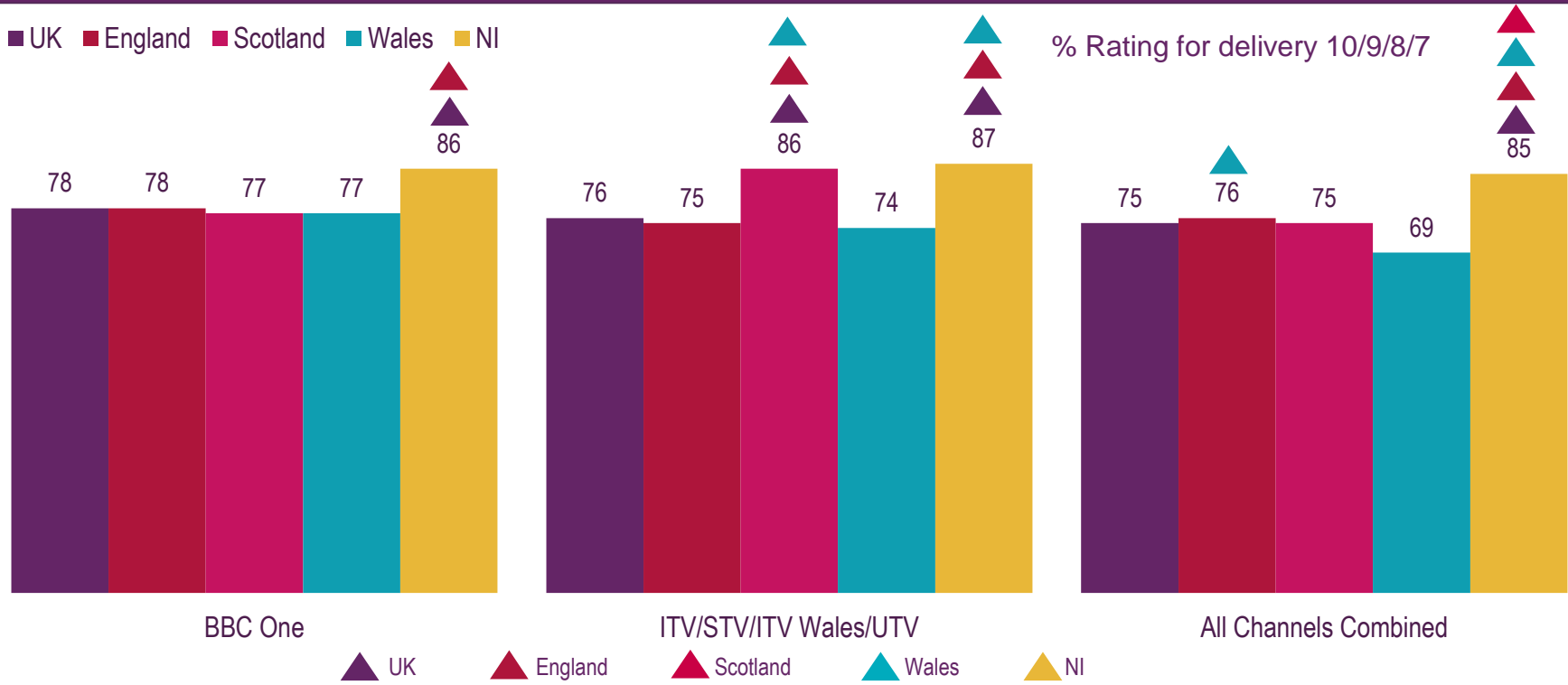
BBC One

- Among regular viewers of BBC One, Northern Ireland scored significantly higher than England for delivery for BBC One (86% vs. 78%).

ITV

- Among regular viewers of ITV, 86% of respondents in Scotland rated STV highly, and 87% of respondents in Northern Ireland rated UTV highly, (10/9/8/7 out of 10), significantly higher than ITV in England and Wales.

Fig 19 'Its regional news programmes provide a wide range of good quality news about my area' (2016, split by nation)



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

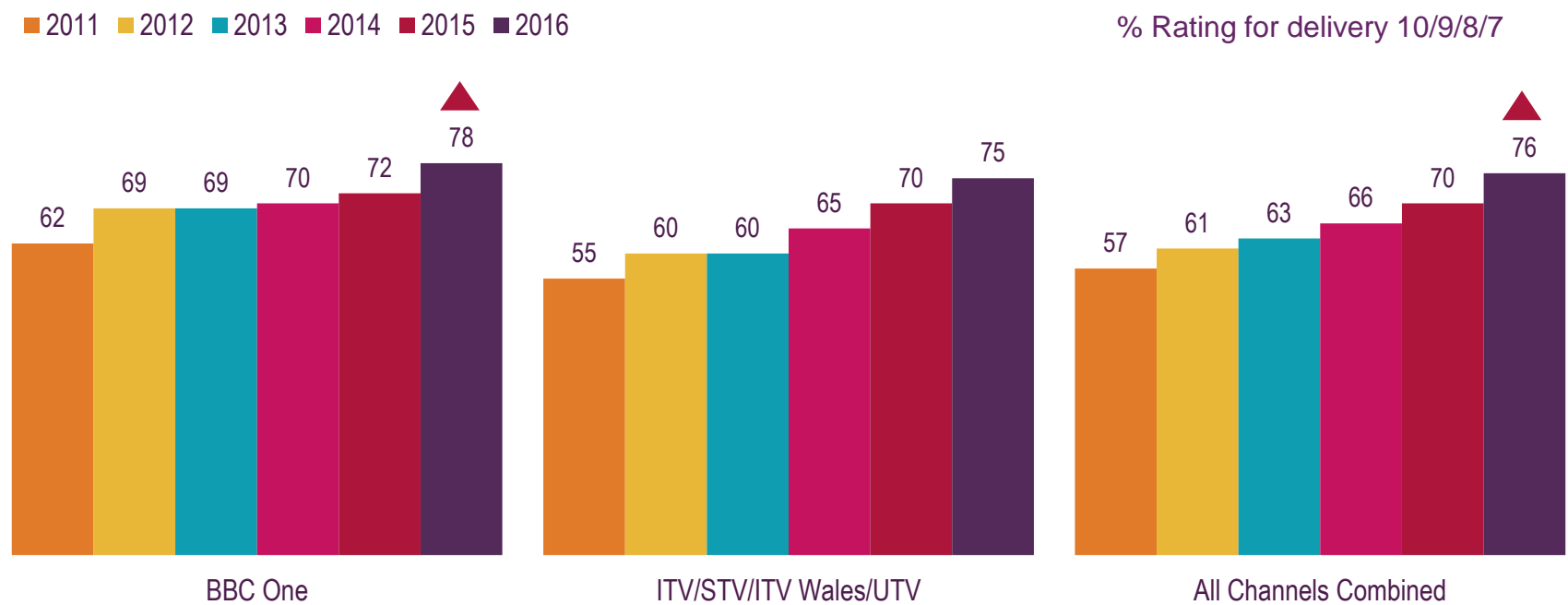
Base for individual channels: Self-defined regular viewers of each in each nation (BBC One = 2358, 1423, 430, 287, 218. ITV1 = 1970, 1211, 315, 234, 210)

Base for 'all channels combined': All respondents who ever watch any PSB channels in each nation (3303, 2000, 591, 416, 296)

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

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown

Fig 20 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in England)



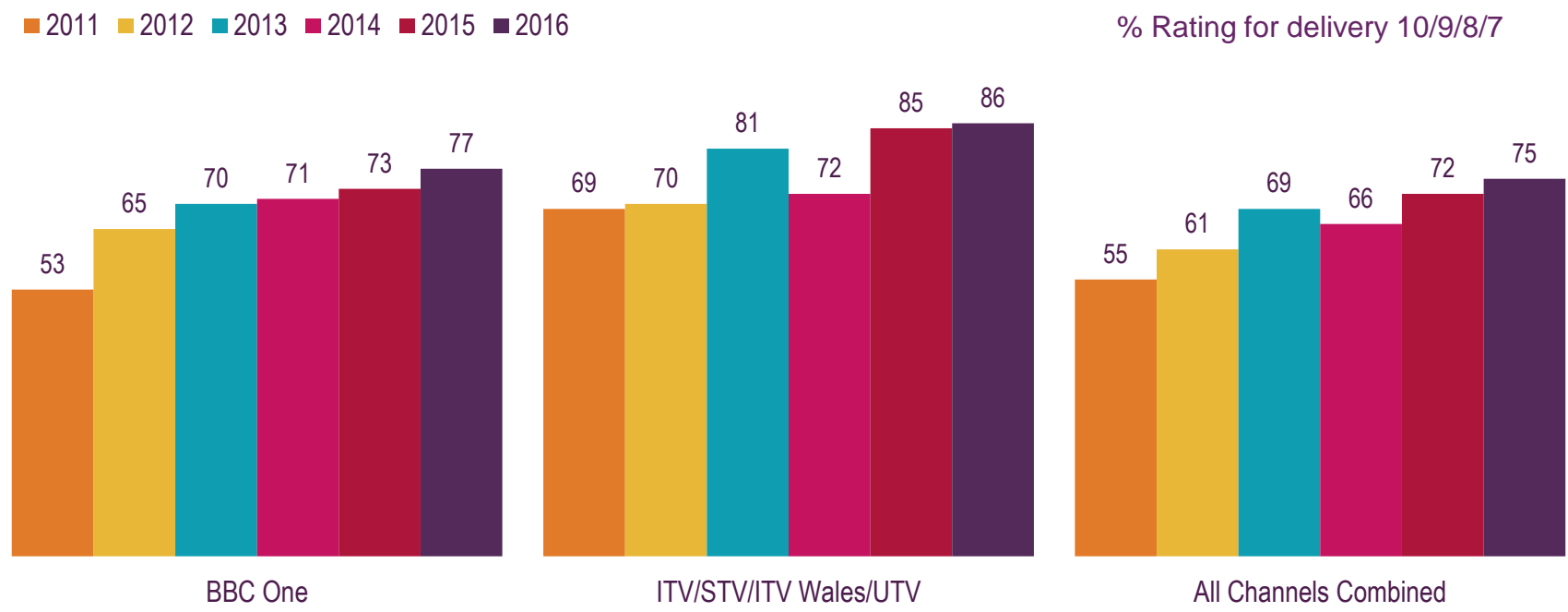
▲ = 99% statistically significant increase from 2015 to 2016

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

Base for individual channels: Self-defined regular viewers of each channel in England. (BBC One = 861, 887, 875, 859, 1690, 1423; ITV1 = 547, 577, 633, 581, 1312, 1211) Base for 'All channels combined': All respondents in England who ever watch any PSB channels (1647, 1593, 1573, 1637, 2324, 2000)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 21 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in Scotland)

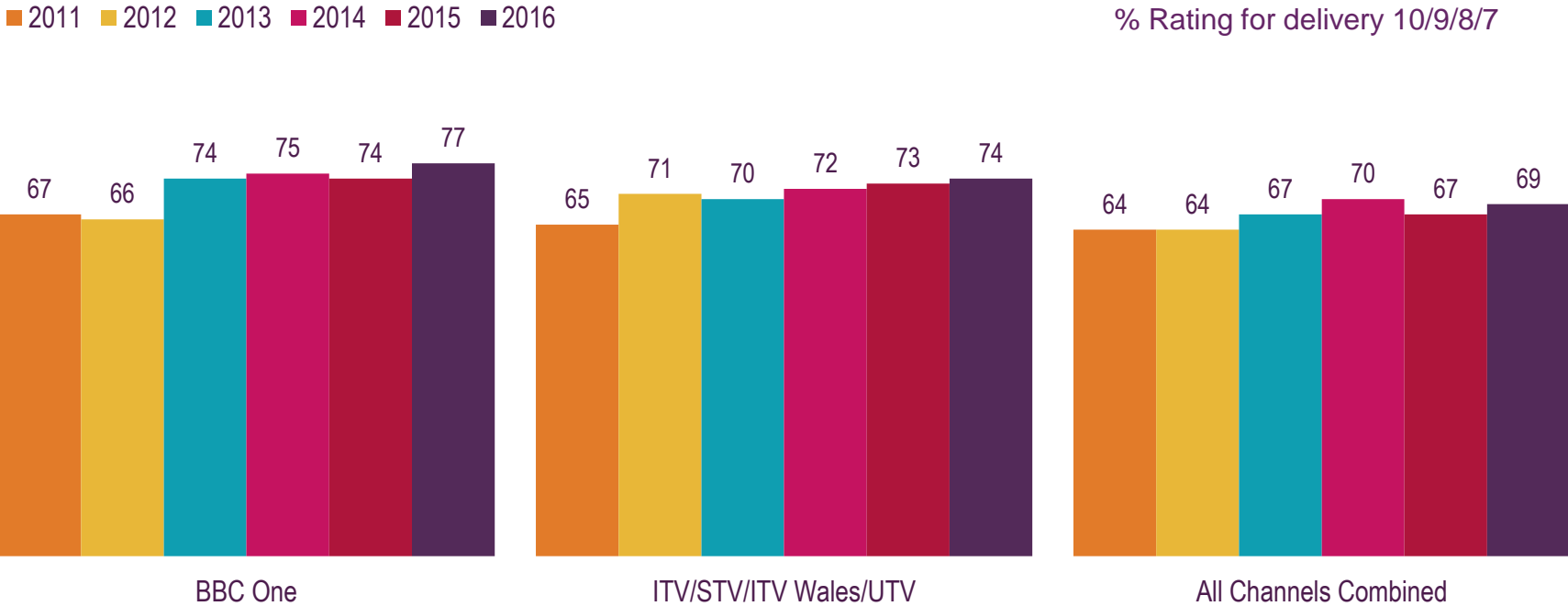


Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-defined regular viewers of each channel in Scotland. (BBC One = 234, 289, 238, 240, 384, 430; ITV1 = 189, 214, 200, 151, 284, 315) Base for 'all channels combined': all respondents in Scotland who ever watch any PSB channels (499, 493, 488, 510, 548, 591)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 22 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in Wales)

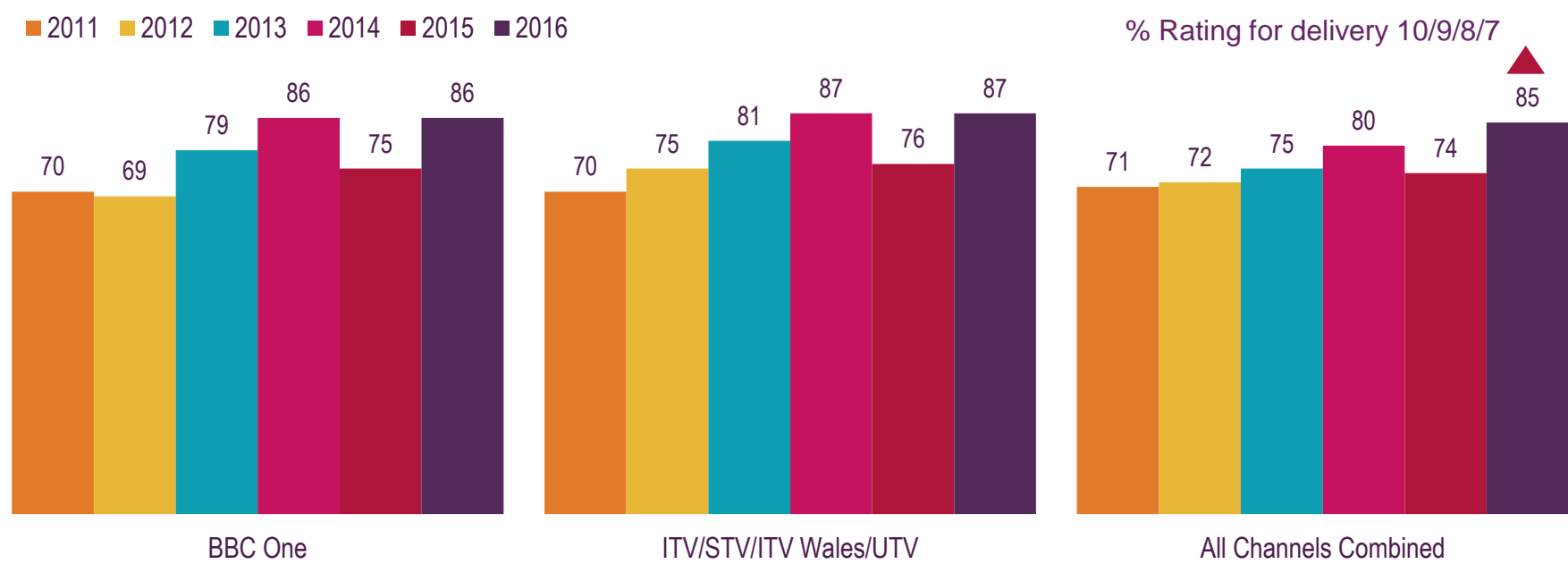


Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-defined regular viewers of each channel in Wales. (BBC One = 268, 276, 235, 238, 312, 287; ITV1 = 175, 191, 173, 147, 236, 234) Base for 'all channels combined': All respondents in Wales who ever watch any PSB channels (474, 447, 433, 457, 433, 416)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 23 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in Northern Ireland)'



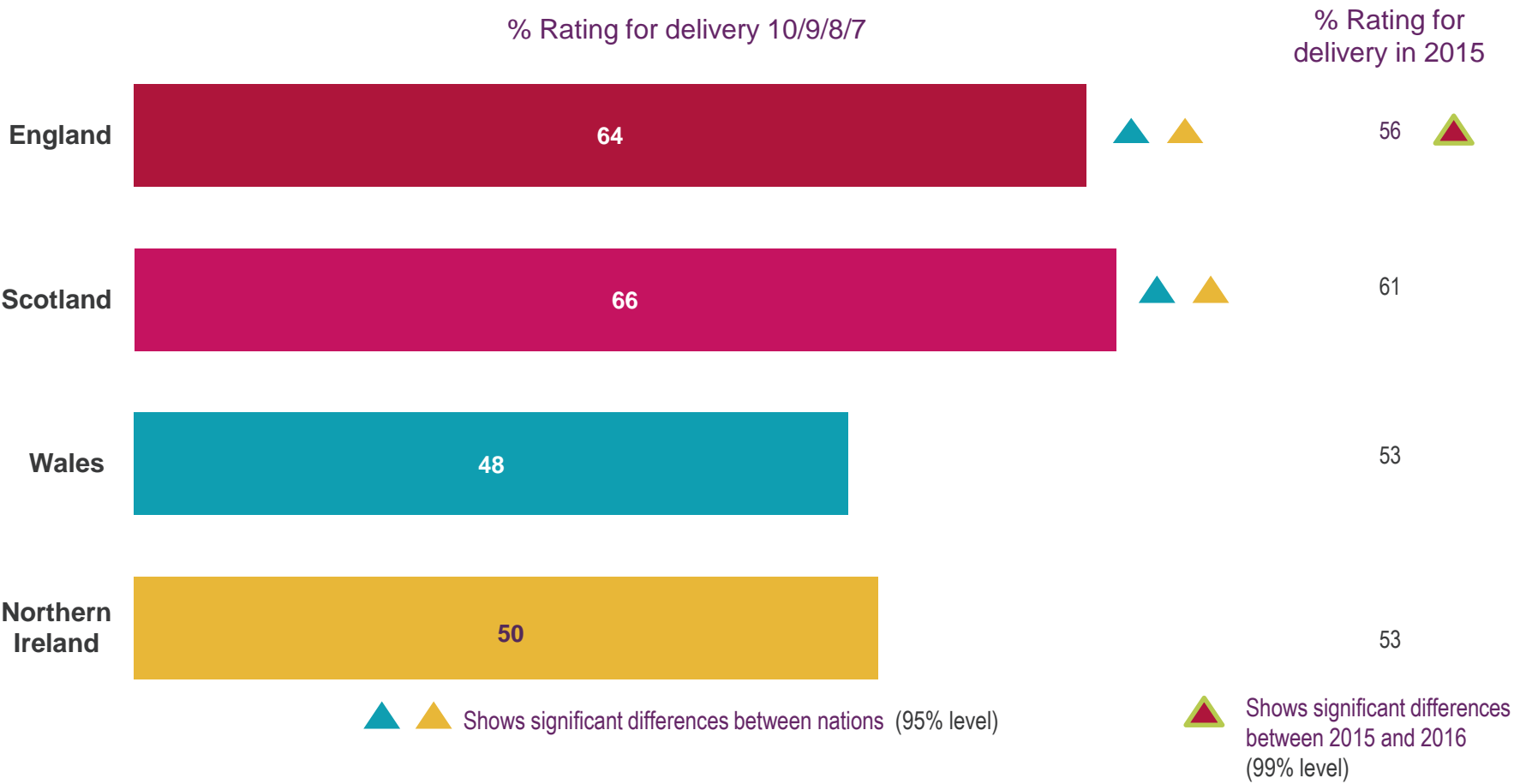
▲ = 99% statistically significant increase from 2015 to 2016

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

Base for individual channels: Self-defined regular viewers of each channel in Northern Ireland. (BBC One = 234, 231, 204, 233, 211, 218; ITV1 = 196, 232, 229, 192, 193, 210) Base for 'all channels combined': All respondents in Northern Ireland who ever watch any PSB channels (459, 450, 432, 462, 301, 296)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 24 'It portrays my region/ Scotland/ Northern Ireland/ Wales fairly to the rest of the UK'



Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.
Base: All respondents who watch any PSB channels regularly or occasionally. All channels combined (2007, 591, 420, 297)

Children's PSB

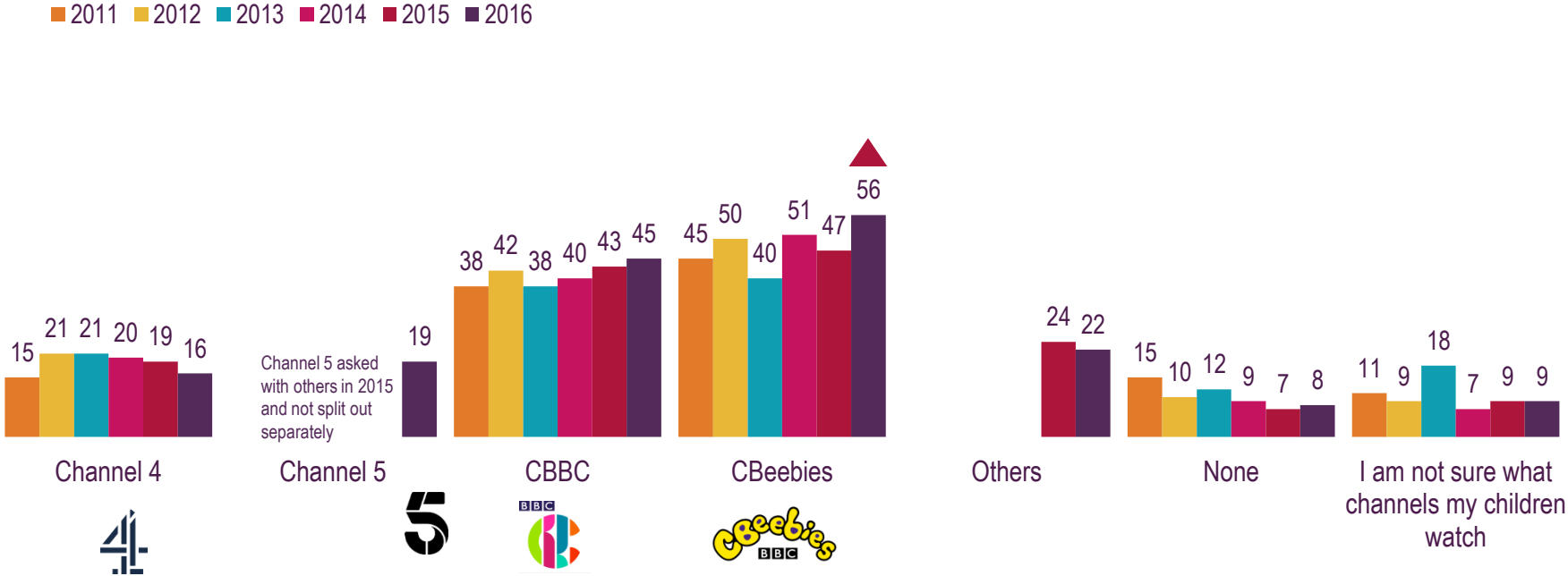
Children's PSB

This section looks in detail at children's PSB. Children's programming is broadcast on dedicated children's channels from the PSB broadcasters and commercial broadcasters. The questions about importance and delivery relating to Channel 5, CBeebies and CBBC were asked of those who were parents/carers of at least one child aged under 16 who watched at least one of these channels, and the questions about Channel 4 were asked of parents/carers of at least one child aged 12-15 who watched this channel.

Key themes

- As seen in previous years, CBBC and CBeebies were significantly more likely to be viewed by children than Channel 4, with significant growth for CBeebies since 2015. Channel 5 was measured separately in 2016 and has a similar level of viewing as Channel 4.
- Rating the importance of children's PSB programming, just under nine in ten (89%) said it was important that *'it provides a wide range of high quality, UK-made programmes for children'*.
- The dedicated children's channels, CBBC and CBeebies, received high ratings for delivery on offering *'a wide range of high quality and UK-made programmes for children'*. There were no significant differences between the two channels in terms of delivery of children's programmes (87% and 89% respectively).
- Eighty-four per cent of parents/carers of children aged 12-15 who watched Channel 4 agreed it was important that *'It provides a wide range of high-quality and UK-made programmes for older children'*. Eighty-five per cent felt it delivered on this statement. The base size for this question was less than 100 before 2015, so the results should be viewed as indicative only.
- There was no significant difference between perceived importance and delivery for children's PSB broadcasters combined (89% and 87% respectively).

Fig 25 Claimed TV viewing by children, reported by parent/ carer



▲ = 99% statistically significant increase from 2015 to 2016

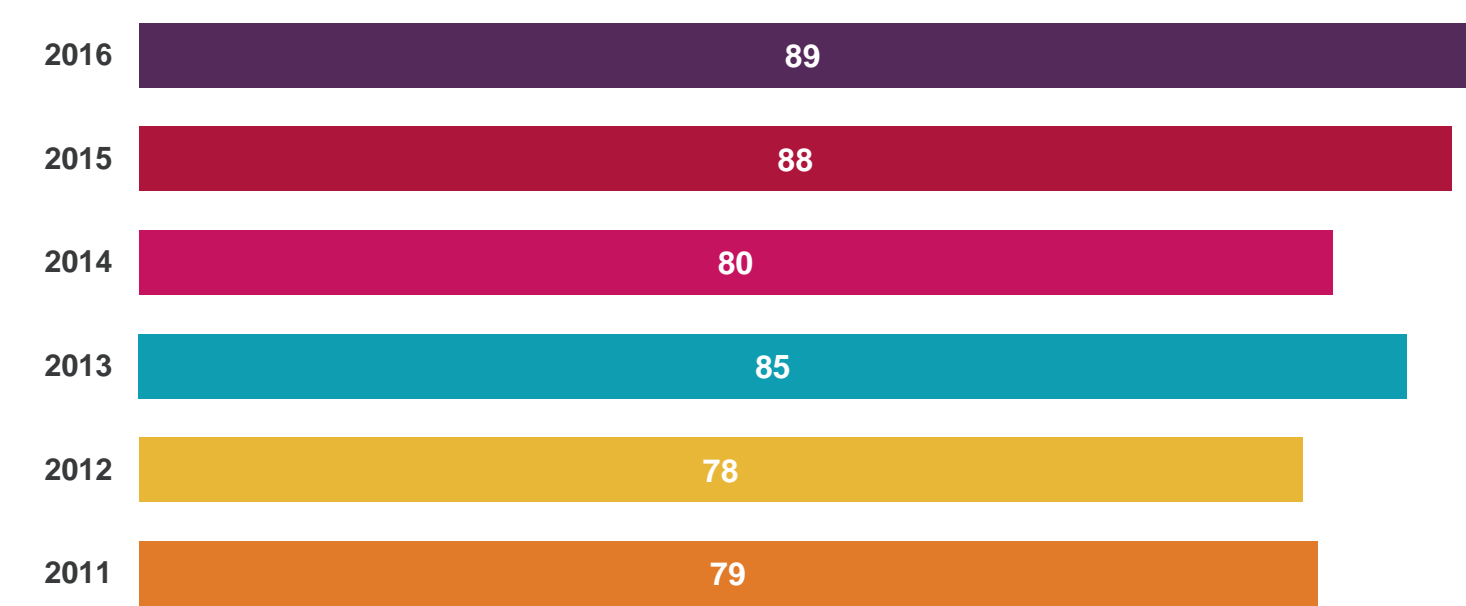
Q On which of these channels does/do your child/children regularly watch programmes aimed specifically at children? NB “aimed specifically at children” was added in 2011.

Base: All responsible for children under 16 (2011=529, 2012=636, 2013=518, 2014=453, 2015 = 800, 2016=880)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Channel 5 included with ‘others’ in 2015. ‘Others’ not shown for 2014 or earlier, as different channels were included as separate codes during these periods. The data cannot therefore be compared.

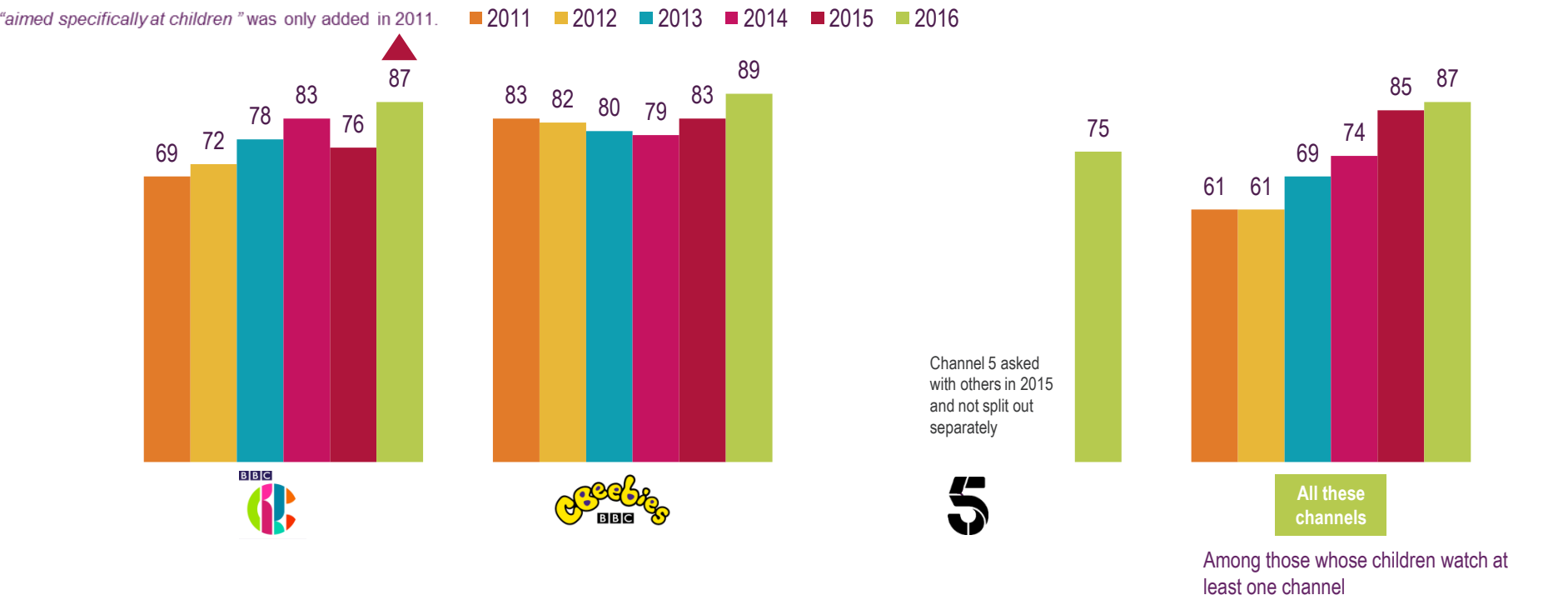
Fig 26 Parents’/ carers’ opinions on the importance of children’s PSB: ‘It provides a wide range of high-quality UK-made programmes for children’



NB in 2010 the question was asked as part of the main *Importance and Delivery* section along with the other statements. In 2011 it was asked in a separate children's section, after the questions on overall satisfaction had been asked.
In 2010 channels asked about were BBC One, BBC Two, ITV1, Channel 4, Five, CBeebies and CBBC. In 2011 BBC Two, ITV1 and Channel 4 were not included. In 2012 BBC One was not included, and in 2014 CITV was added. In 2015 the channels asked about were CBBC and CBeebies. In 2016 Channel 5 was added.

* In 2015 this was asked of those whose children watched at least CBBC or CBeebies. In previous years it had also included BBC Alba, S4C, Channel 5 and CITV.
Extent to which the purposes/ characteristics applies to the channel(s), where 10 is the highest score and one is the lowest. (% rating 10/9/8/7)
Base for 'all children's' PSB channels': All respondents whose children regularly watch at least one channel (363,487,333,321,511,665)
Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Fig 27 Parents'/ carers' opinions on the delivery of children's PSB: 'It provides a wide range of high-quality UK-made programmes for children'



▲ = 99% statistically significant increase from 2015 to 2016

Q On which of these channels does/do your child/children regularly watch programmes aimed specifically at children? NB "aimed specifically at children " was only added in 2011.

Base: All responsible for children under 16 (2011=529, 2012=636, 2013=518, 2014=453, 2015 = 800, 2016=880),

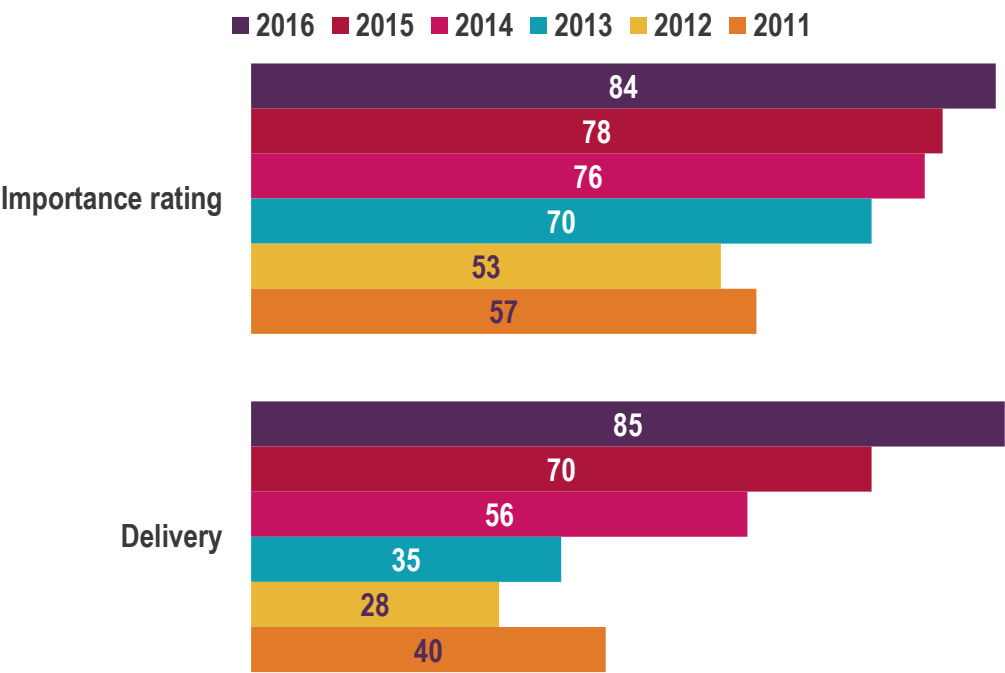
Base for individual channels: Those whose children are regular viewers of each channel featured (CBBC = 180, 271, 203, 181, 375, 445 CBeebies = 218, 320, 218, 214, 383, 511)

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Up to 2015 'All these channels' included CBBC and CBeebies, in 2016 this also included Channel 5

Fig 28 Parents’/ carers’ opinion on Channel 4 (indicative only)

% Rating 10/9/8/7



**NB Asked for Channel 4 only and of parents with a child aged 12-15 'It provides a wide range of high quality and UK-made programmes for children'*

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

Base: All those with a child aged 12-15 that watches Channel 4 (68, 55, 64, 52, 104, 118) – CAUTION, SMALL BASE SIZES.

Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

Individual PSB channel summaries

PSB channel summaries

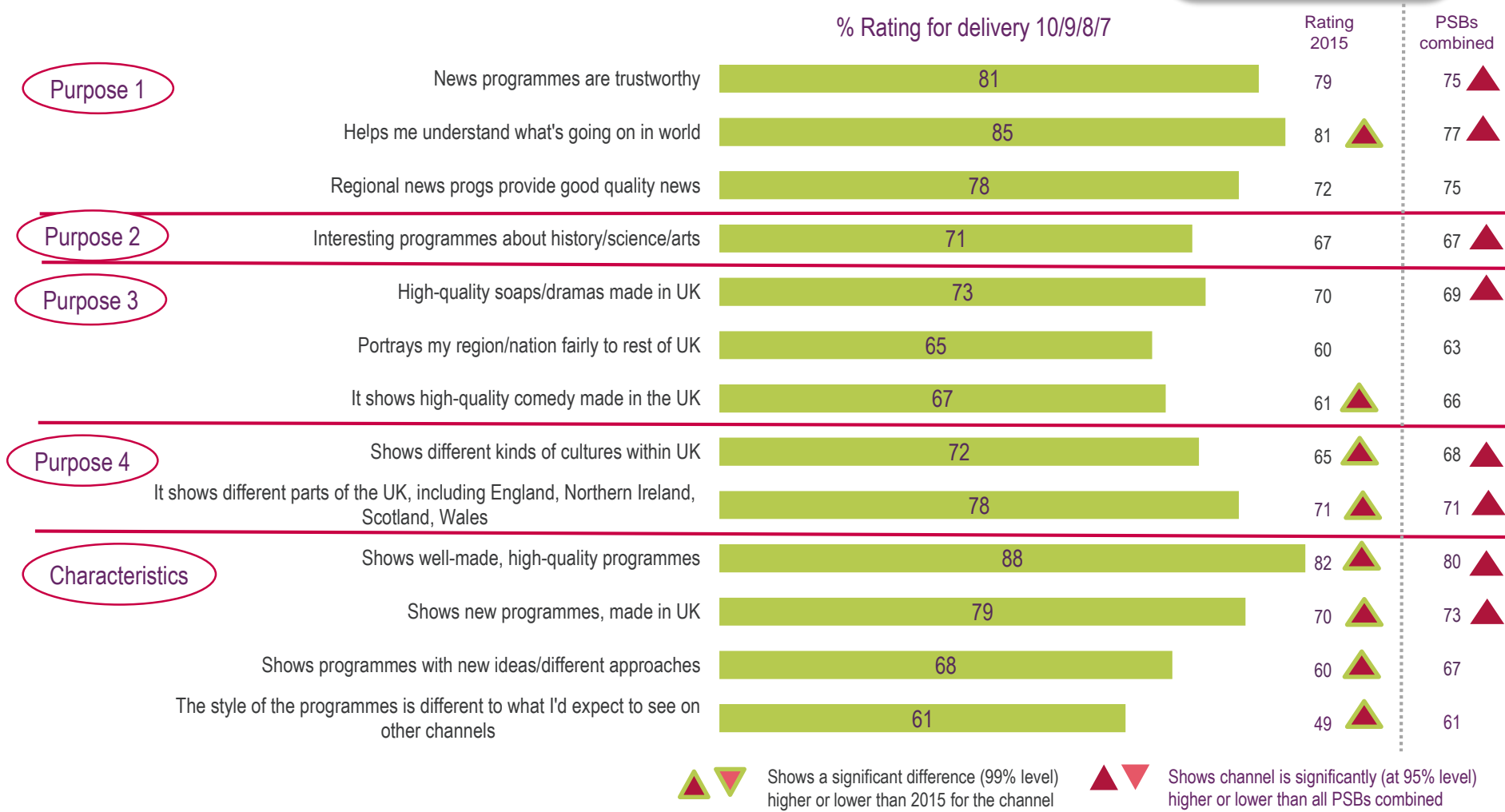
The following charts summarise audience opinion of the delivery of each of the purposes and characteristics for BBC One, BBC Two, ITV and Channel 4, among regular viewers of each channel.

Key themes

- BBC One's highest score was 88% for *'Shows well-made, high-quality programmes'*. Its lowest score was for *'The style of the programmes is different to what I'd expect to see on other channels'* (61%).
 - There were several improvements in perceived delivery since 2015, with the largest increases for characteristics ratings. Although *'The style of the programmes is different to what I'd expect to see on other channels'* was rated lowest, this was a 12 percentage point improvement on 2015 ratings (49% to 61%).
- BBC Two's highest score was for the same statement as BBC One: *'Shows well-made, high-quality programmes'* (88%). Its lowest score was for *'High quality soaps and dramas'* (49%).
 - Opinion on delivery has improved over several of the purposes and characteristics since 2015, notably, across-the-board improvements for purpose 4 and for characteristics. The sharpest increases in perceived delivery were for *'Shows different kinds of cultures within the UK'* (59% in 2015 and 70% in 2016) and for *'Shows new programmes made in the UK'* (63% to 75%).
- For ITV, *'Shows well-made high quality programmes'* received the highest score (84%), closely followed by *'News programmes are trustworthy'* and *'High-quality soaps/dramas made in UK'*, (80% for each). Its lowest score was for *'Interesting programmes about science, history and arts'* (50%).
 - ITV also showed improvements in delivery for purpose 4 and for characteristics: *'The style of the programmes is different to what I'd expect to see on other channels'* improved most since 2015 (44% to 56% in 2016)
- Channel 4's highest score was 80% for *'Shows well-made, high quality programmes'*. Its lowest score was 44%, for *'Portrays my region/nation fairly to rest of UK'*.
 - There were some improvements in delivery since 2015 across a range of purposes and characteristics; the greatest improvement was for *'The style of the programmes is different to what I'd expect to see on other channels'* (61% in 2015 to 73% in 2016) and for *'Shows well-made, high quality programmes'* (69% to 80%).
- Channel 5 received the highest score for *'Well-made high quality programmes'* (72%) and its lowest score for *'Portrays my region/ nation fairly compared to the rest of UK'* (42%). It scored significantly lower, compared to all PSBs combined, for ten of the 12 delivery measures.

Fig 29 BBC One





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

Base: Self-reported regular viewers of BBC One (2358), Self-reported regular/occasional viewers of any PBS channel (3315)

Fig 30 BBC Two

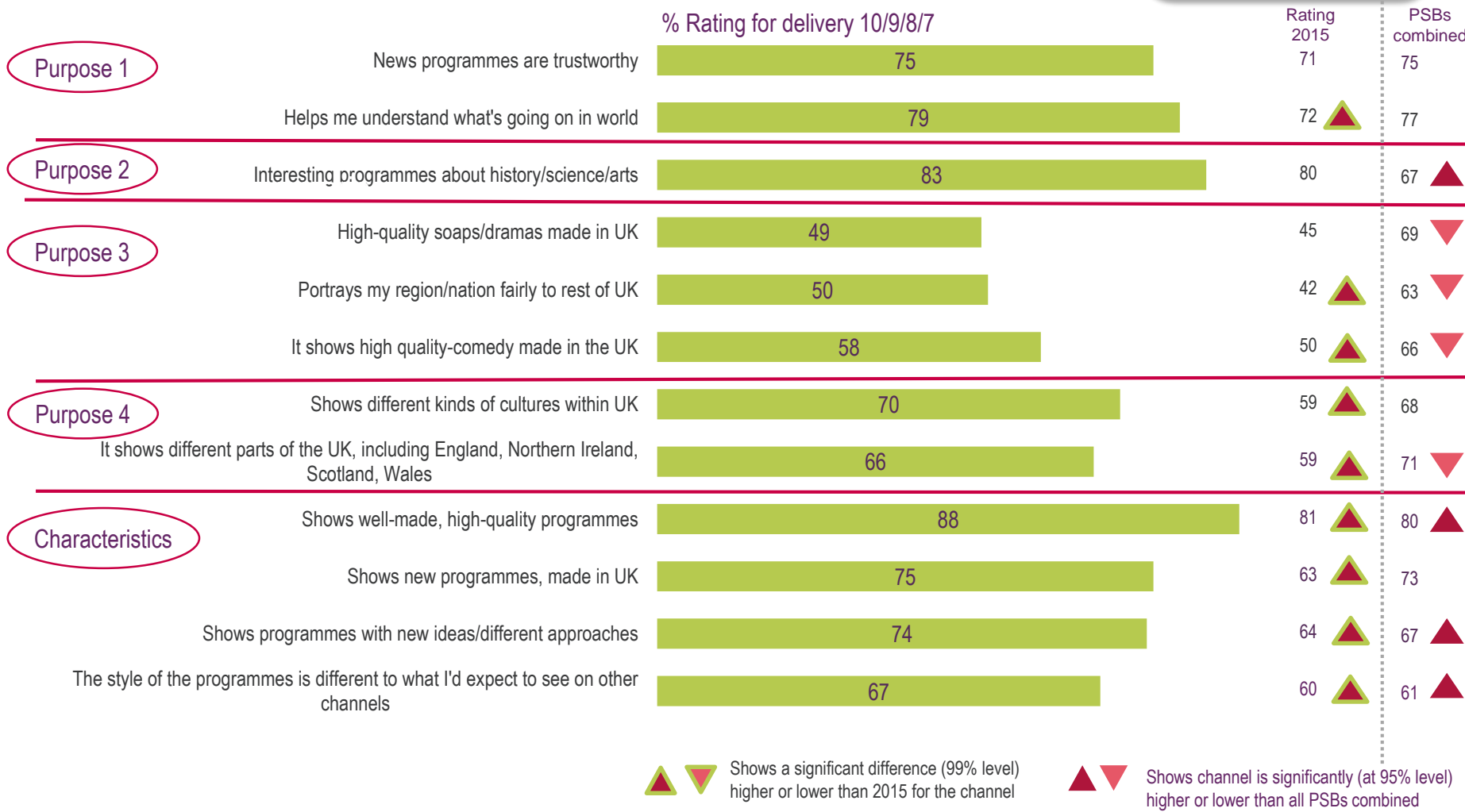


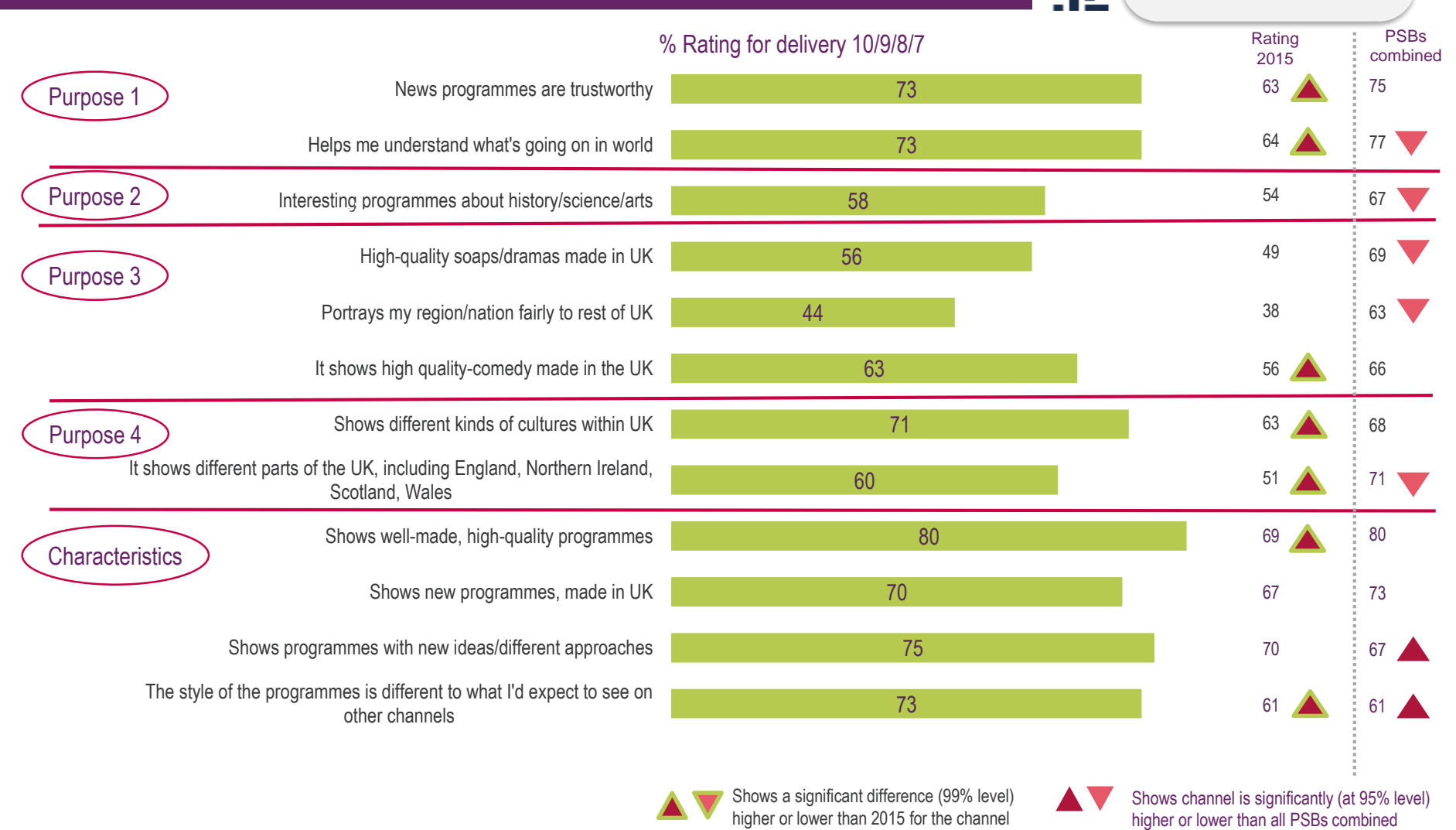
Fig 31 ITV/ STV/ ITV Wales/ UTV



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

Base: Self-reported regular viewers of ITV (1970), Self-reported regular/occasional viewers of any PBS channel (3315)

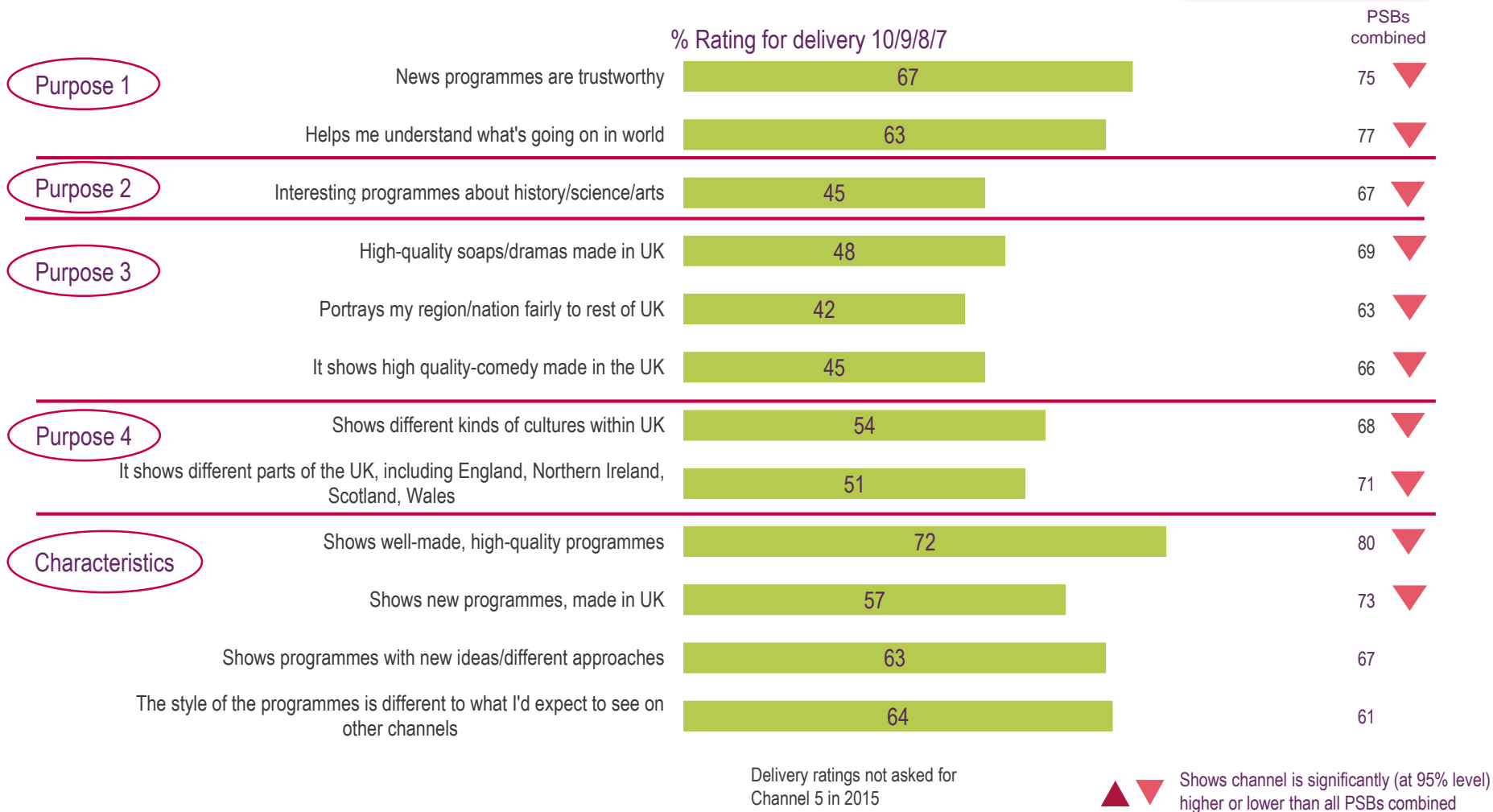
Fig 32 Channel 4



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

Base: Self-reported regular viewers of Channel 4 (1297), Self-reported regular/occasional viewers of any PBS channel (3315)

Fig 33 Channel 5



Base: Self-reported regular viewers of Channel 5 (827), Self-reported regular/occasional viewers of any PBS channel (3315)
Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and one is the lowest (% rating 10/9/8/7).

BBC portfolio channel summaries

The following charts summarise audience opinion of the delivery of each of the purposes and characteristics for BBC Three and BBC Four among regular viewers of each channel.

Key themes

- BBC Three's highest score was 79% for *'Shows well-made, high-quality programmes'*. Its lowest score was for *'Portrays my region/nation fairly to rest of UK'* (53%).
 - Although there were no significant improvements in delivery ratings, there were slight improvements for all measures in 2016.
- For BBC Four the highest score was for: *'Shows well-made high quality programmes'* (85%) and two statements scored the lowest: *'High-quality soaps/dramas made in the UK'* (39%) and *'It shows high quality comedy made in the UK'* (39%).
 - Three significant improvements were seen for BBC Four quality measures in 2016, two of which were for characteristics measures; the largest increase was for purpose 1 measure: *'Helps me understand what's going on in the world'* (59% in 2015 to 72% in 2016).

Fig 34 BBC Three

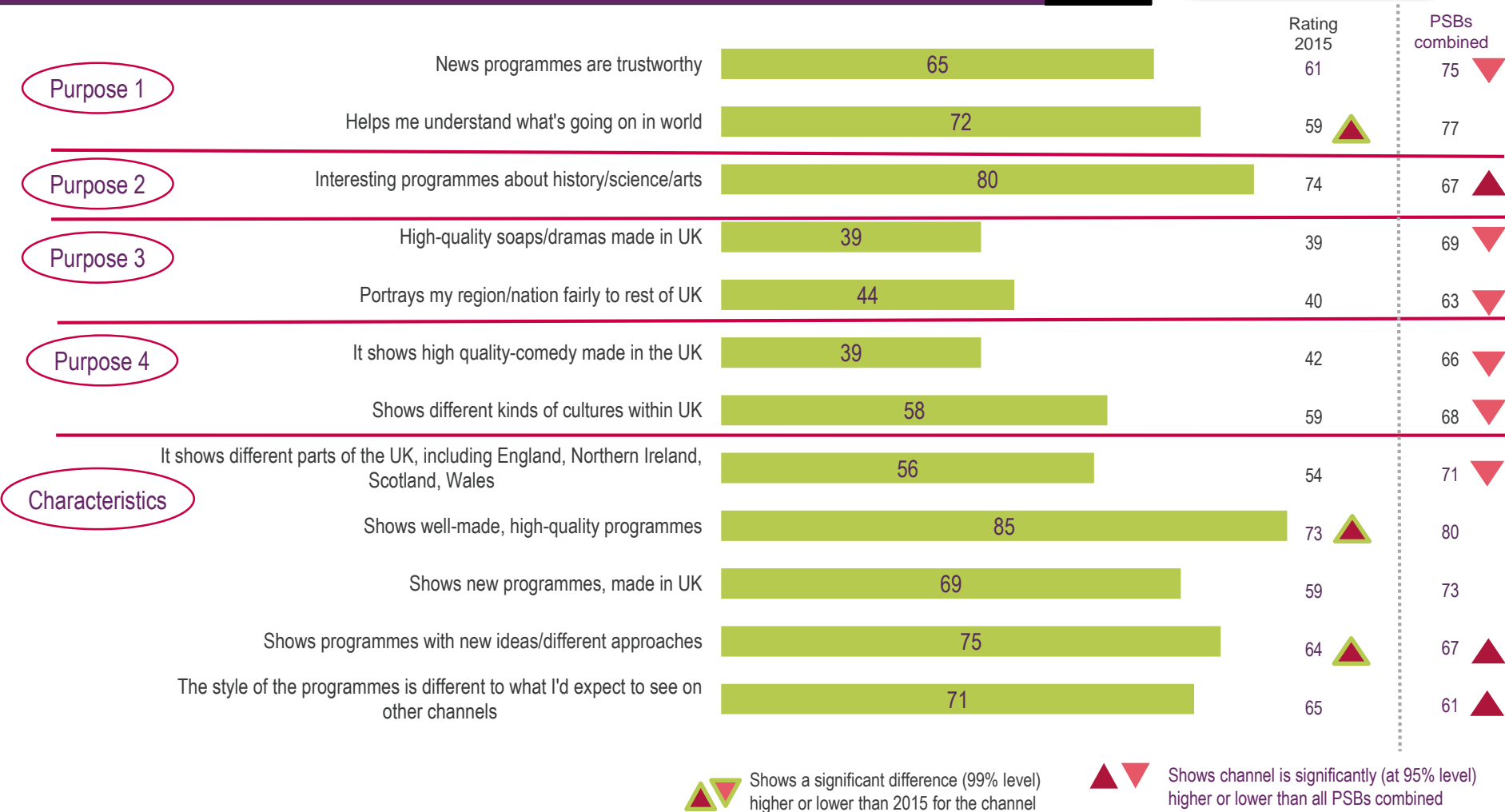


Base: Self-reported regular viewers of BBC Three (247), Self-reported regular/occasional viewers of any PBS channel (3315)

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

Fig 35 BBC Four

BBC
FOUR



Base: Self-reported regular viewers of BBC Four (471), Self-reported regular/occasional viewers of any PBS channel (3315)

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

PSB website use and online viewing

BBC portfolio channel summaries

This section looks at use of the PSB channels' websites (bbc.co.uk and channel4.com only), and the main PSB catch-up services.

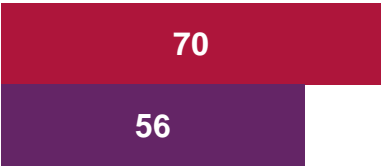
Key themes

- Just over two-thirds (70%) of all respondents felt that it was important (i.e. gave a rating of 10/9/8/7) that *'the BBC provides a website with high quality content that you can trust'*. More than half (56%) of respondents felt that it was important that Channel 4 did the same.
- The level of those with internet access using the channels' websites in the previous month was 46% for bbc.co.uk and 11% for channel4.com.
- More than four in five of respondents were satisfied with the websites (89% for bbc.co.uk and 84% for channel4.com).
- Just over half (53%) claimed to use the internet to watch or download programmes or films.
- The most frequently-viewed PSB catch-up service among respondents was BBC iPlayer, with 50% of using it once a month or more, followed by ITV Hub (39%), All 4 (29%), and My5 (16%).
 - For ITV Hub there was a significant increase in weekly use since 2015 (20% to 24% in 2016)
- Satisfaction among users of each on-demand service followed the pattern of overall use. BBC iPlayer had the highest satisfaction (88% of iPlayer users were satisfied), significantly higher than in 2015 (84%), followed by ITV Player (79% of ITV Player users were satisfied in 2016), All 4/4oD (75%), and Demand 5/My5 (62%).
- Seventy-seven per cent of all respondents felt that it was important (i.e. gave a rating of 10/9/8/7) that broadcasters provide catch-up services which allow viewers to watch previously broadcast programmes.

Fig 36 Attitudes towards BBC and Channel 4 websites

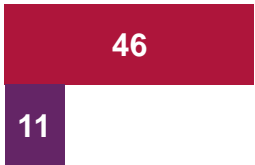
% Rating 10/9/8/7

Importance of BBC / Channel 4 providing a website with high quality content that you can trust



Used website in the last month

All with internet access



■ **bbc.co.uk**
■ **channel4.com**

Satisfaction with the website

All that have used the website in last month

% Rating 10/9/8/7

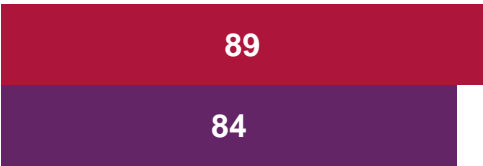
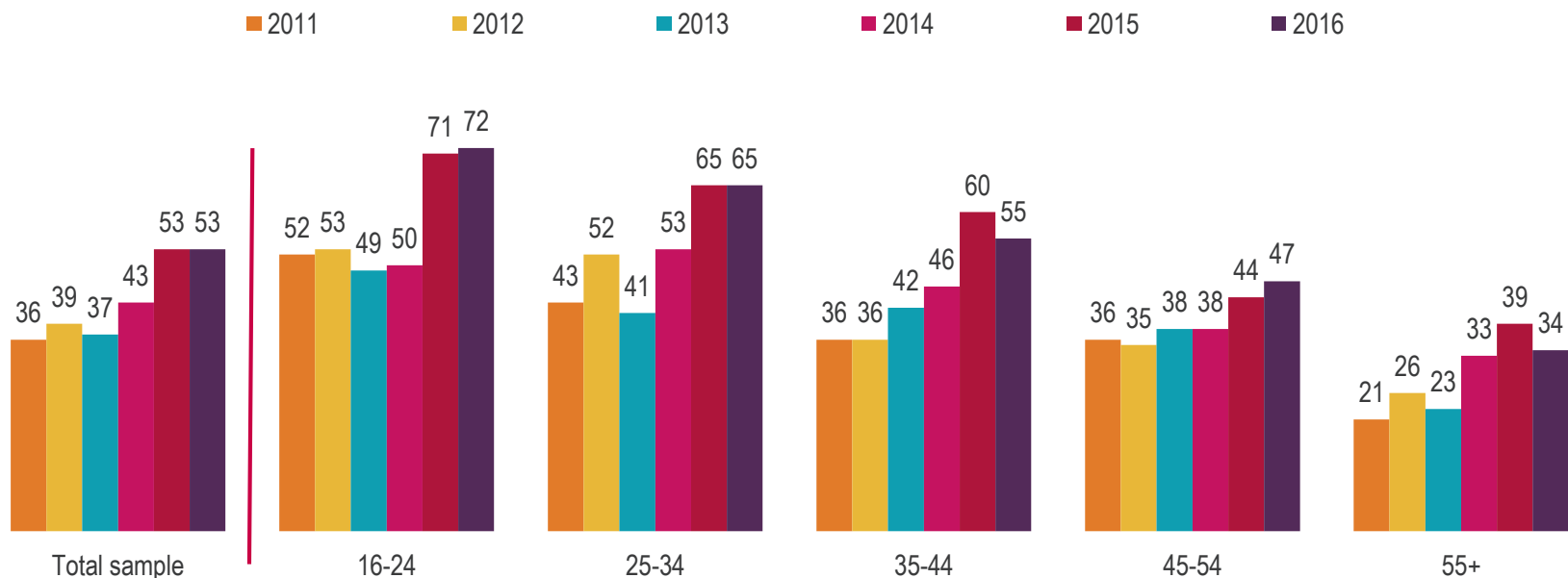


Fig 37 Online viewing



Base: All with internet access (2011=2356,2417, 2429, 3320, 3463, 3207), 16-24 (685, 400,398, 398, 513, 536, 460), 25-34 (1257, 426, 427, 427, 570, 562, 536), 35-44 (1176, 495, 519, 463, 599, 607, 570), 45-54 (1312, 433,412, 456, 611, 598, 568), 55+ (1168, 602,661, 685, 1027,1160, 1073)

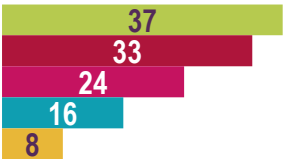
Note: Methodology change in 2015 – data shown between 2011 and 2014 have been reweighted for comparison purposes. Only statistically significant changes between 2015 and 2016 shown.

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

Fig 38 Catch-up services

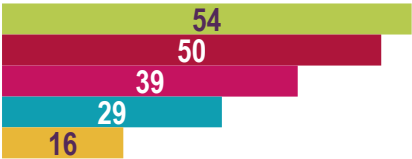
Catch-up service used weekly or more often

All respondents



Catch-up service used monthly or more often

All respondents



Satisfaction with the service

All who used the service in last month

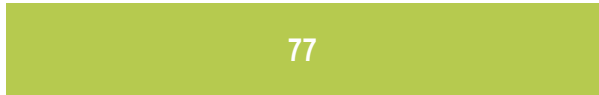
% Rating 10/9/8/7 for satisfaction



Importance of broadcasters providing catch-up services

All who used the service in last month

% Rating 10/9/8/7 for importance



▲ ▼ Shows catch-up service is significantly (at 99% level) higher or lower than 2015

Q And for each one please could you tell me how often you typically watch each one? Base: All (3364)

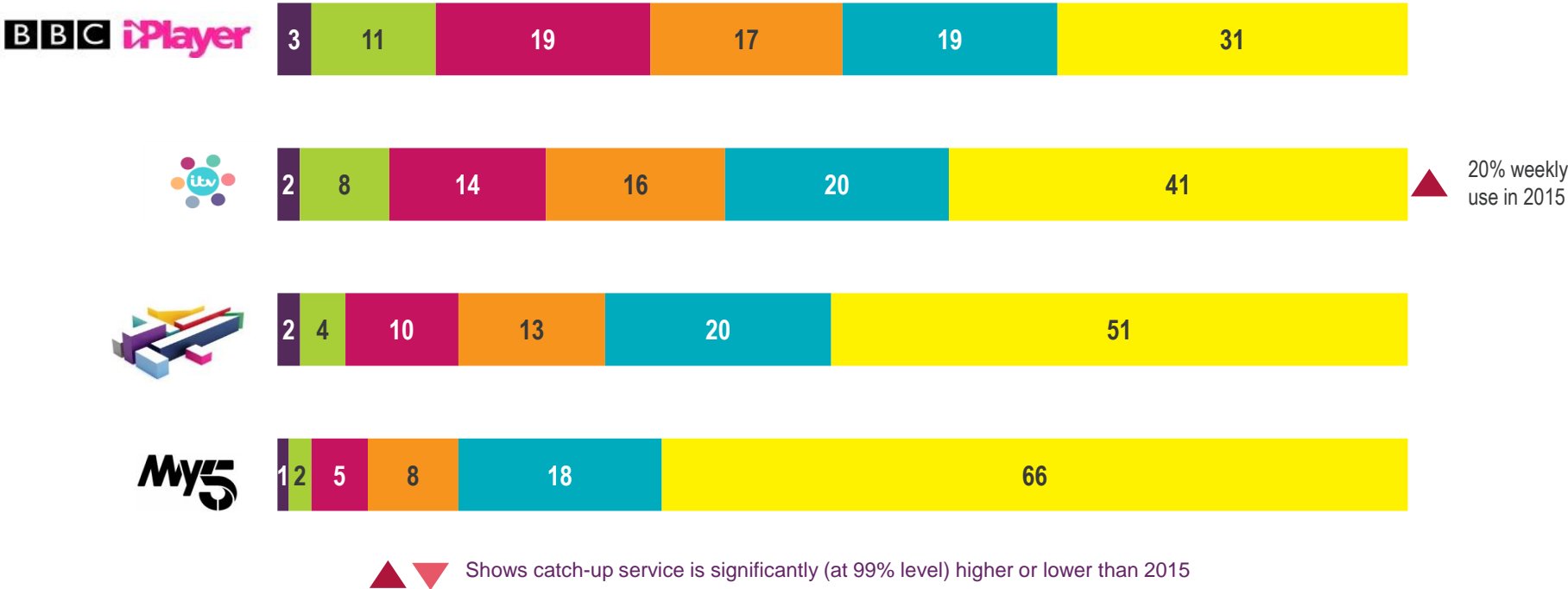
Q And how would you rate your overall satisfaction with <online player>? Base: All that have used this service in the last month (BBC iPlayer 2616, ITV Player 2212, All4/4oD 1985 , Demand 5/My 5 1403)

Q How important do you think it is that broadcasters provide these types of catch-up services, which allow viewers to watch previously broadcast programmes? Base: All 3364)

*Any catch up" includes S4C Clic

Fig 39 Frequency of viewing on-demand services

■ Every day ■ Several times a week ■ At least once a week ■ At least once a month ■ Less than once a month ■ Don't use this service



Q Please could you tell me how often you typically watch each one?
Base: All respondents (3364)

Demographics

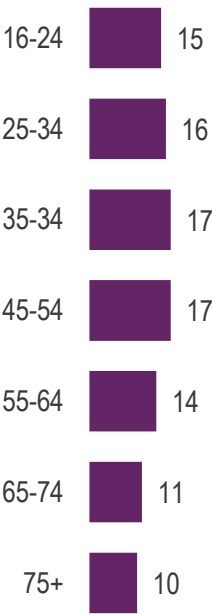
Demographics (1)



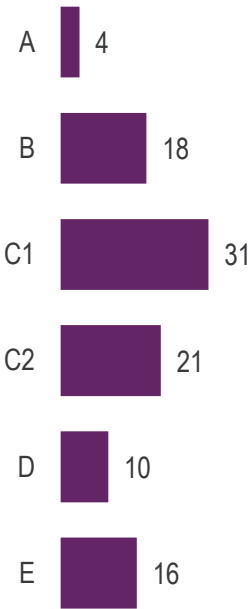
Gender



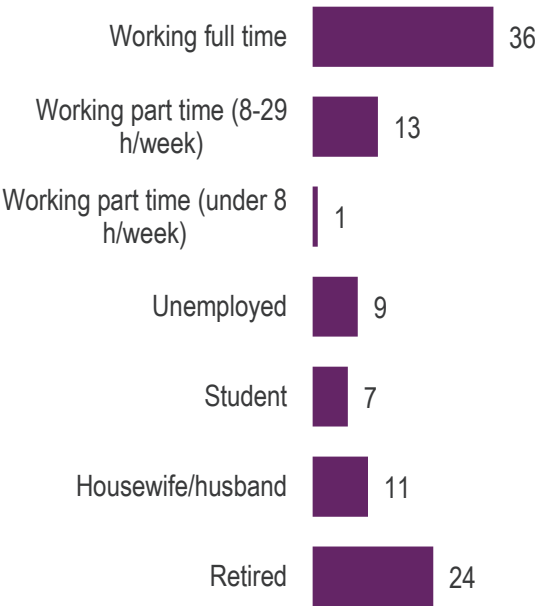
Age



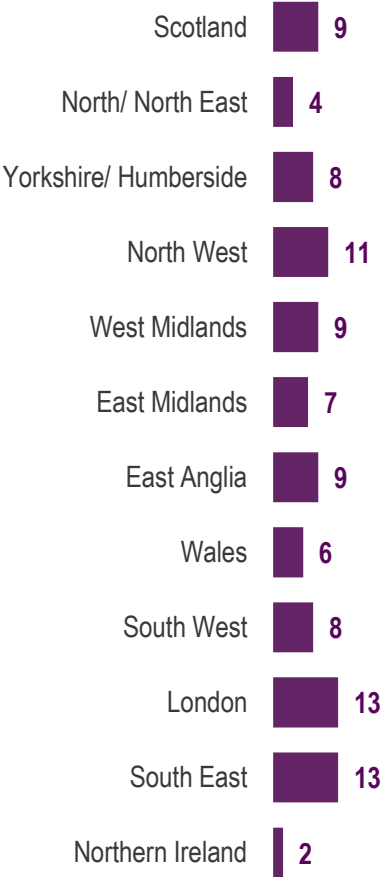
Socio-economic group



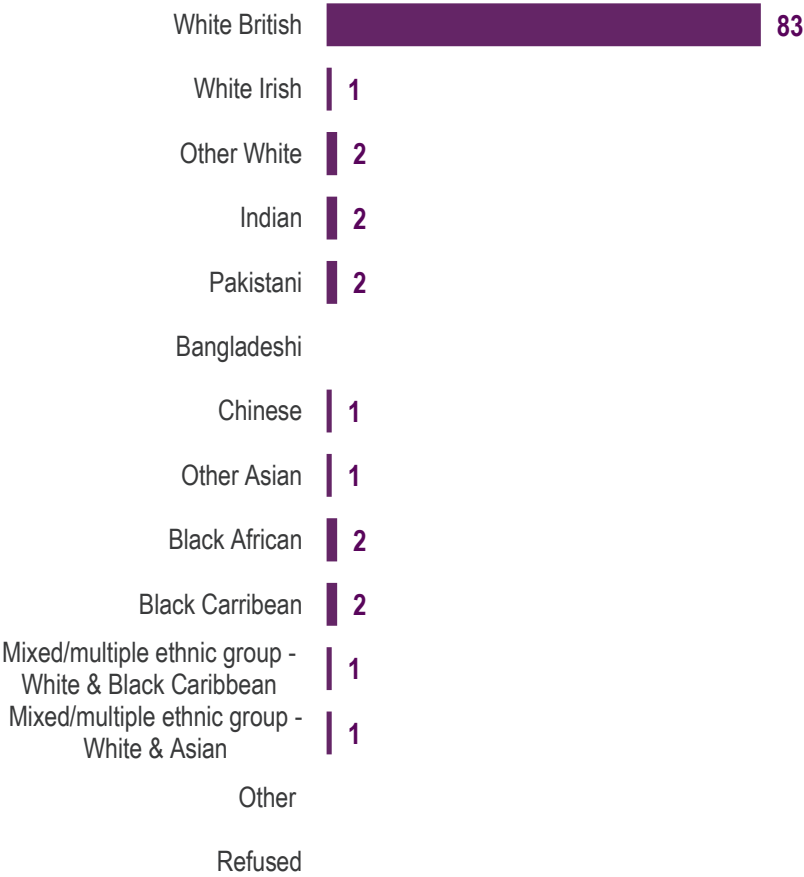
Working status



Region



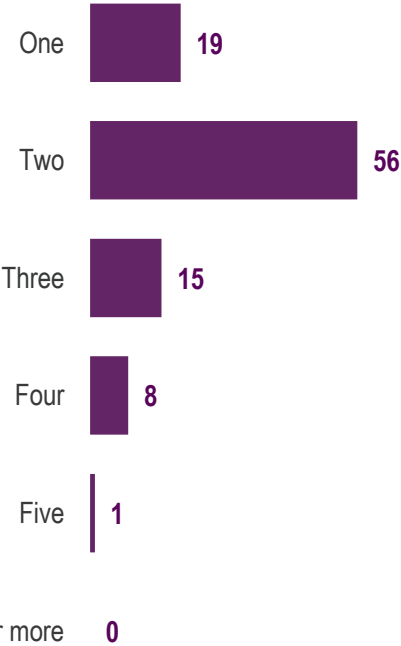
Ethnic background





Household size and composition

Number of adults (16+) in household



Children under 16 in household



Responsible for children under 16



Demographics

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

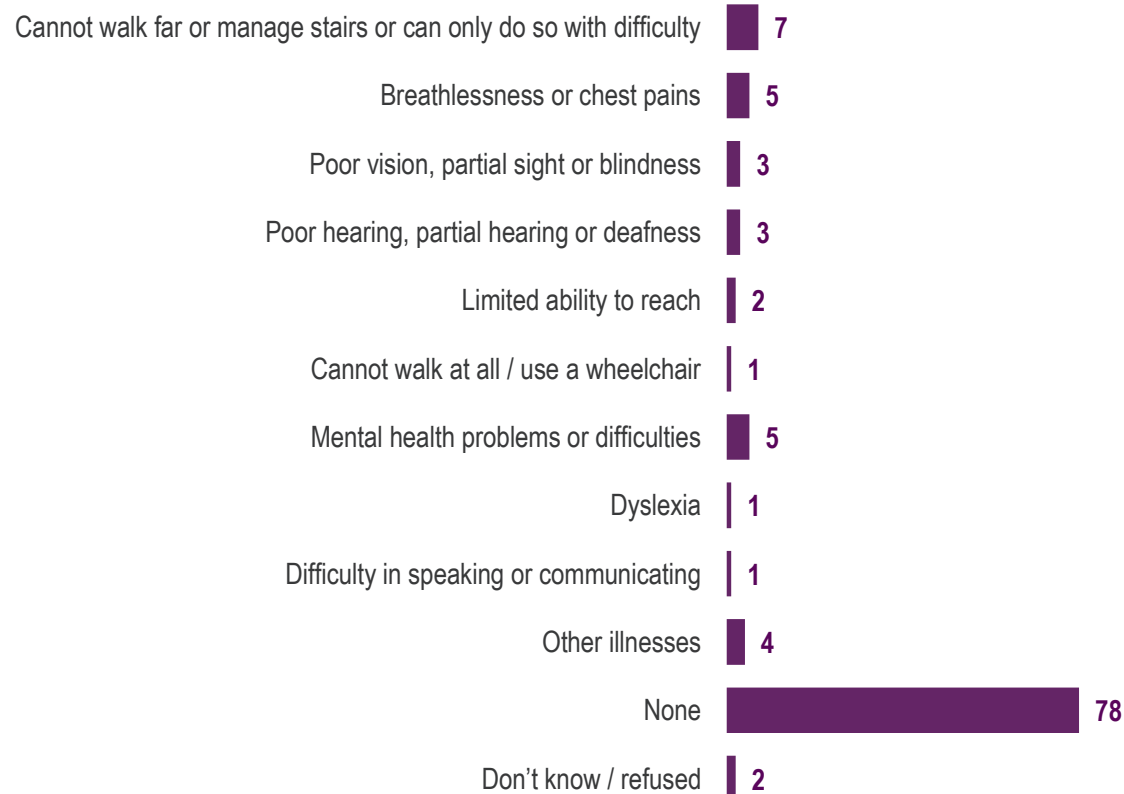
Q Are there any children under 16 in your household?

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

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

Base: All (3364)

Limitations in daily activities or work



Q Which of these, if any, limit your daily activities or the work you can do?

Base: All (3364)