

# Television promotions - what the viewers think

## A report of the key findings of a qualitative and quantitative study

**Research study conducted by The Knowledge  
Agency Ltd on behalf of Ofcom for the purposes of  
its review of the cross promotion rules**

**6 December 2005**

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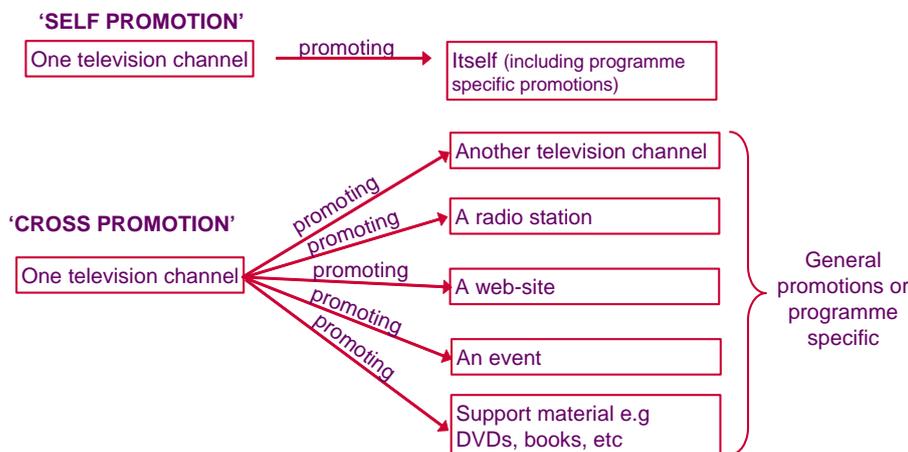
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## Section 1

# Executive summary

## Objectives & methodology

- As part of Ofcom's Review of the cross promotion rules, Ofcom commissioned a primary research study to understand audience views on the subject of promotions during end credits, commercial breaks and within programmes. The research was timed to run in parallel with a content analysis study quantifying the amount of promotional activity being broadcast across a range of channels.
- The audience research was designed to investigate specific questions that included:
  - Do audiences see any issues with promotional activity?
  - How do audiences decide on their viewing and therefore what is the role of promotional activity?
  - Which type of activity is seen positively and which is seen more negatively?
  - When is promotional activity seen as useful?
  - Are there any concerns that promotional activity within a programme compromises programme quality?
- The definition of promotion used in the study has been summarized below:



## Research findings

- Overall, the qualitative research suggests promotional activity has far reaching benefits for viewers that outweigh some minor issues.
- The use of viewing diaries made respondents more aware of the ubiquity of programme promotions - something to which many of them had been previously oblivious. This highlighted the fact that this type of activity is not necessarily top-of-mind.

- Viewers claimed to use promotions for programmes and channels extensively to help plan and shape their viewing choices.
- Participants in the focus groups felt promotions stimulate choice between channels and programmes and promotions for services such as websites and interactive television help to make television a less passive experience.
- Different types of promotions raised different issues in the focus groups:
  - Programme-specific promotions, for programmes up to seven days ahead, were seen as most useful in forward planning viewing
  - Cross promotion between channels provoked mixed feelings. Multichannel focus group respondents were particularly positive towards cross channel promotions. Digital-only content promotions led to frustration among terrestrial viewers – mainly because content they could not access was being promoted. Nevertheless, there is evidence that this kind of promotion is encouraging switch-over
  - General channel and corporate promotions were accepted as a necessary part of competition between broadcasters
  - Participants saw few benefits of radio promotions on television – especially since many respondents felt that television viewing and radio listening were not interchangeable during peak viewing times
  - Web promotion appealed to respondents as a way of furthering interests and hobbies
  - Promotions for books, DVDs and magazines are acceptable to most
- On the whole, viewers prefer promotions offering “taster clips” of the programme trailed.
- Most people accepted promotions in breaks between programmes and over end credits. Mid-programme centre-break promotions were seen as more intrusive, and were generally not welcomed.
- A majority were comfortable with within-programme promotions– although few of the participants in the focus groups had experienced this type of activity.
- BBC promotions were perceived to stand out more, due to lack of commercial activity and production quality of promotions.
- Smaller channels were seen as promotionally disadvantaged compared to the terrestrial channels (and their respective digital channels), but this was not seen as a reason to restrict promotional activity across bigger channels. Focus group participants felt any rules around promotional activity should apply equally to all channels.
- The current volume of promotional activity is felt to be acceptable, although few if any of the focus group respondents, were comfortable with the idea of more promotions.

## Section 2

# Research objectives and methodology

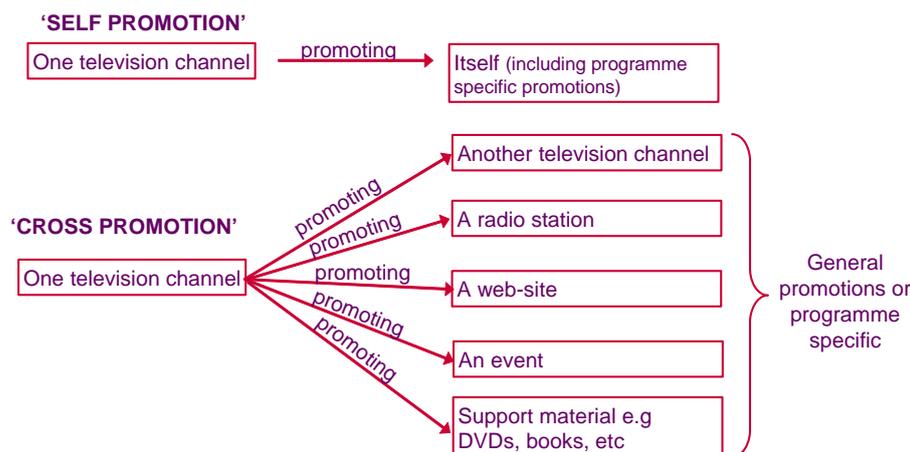
## Background and Objectives

As part of Ofcom's Review of the cross promotion rules, primary research was commissioned to understand audience views on the subject of promotions during end credits, commercial breaks and within programmes. The research was timed to run in parallel with a content analysis study quantifying the amount of promotional activity being broadcast across a range of channels.

The audience research was designed to investigate specific questions that included:

- Do audiences see any issues with promotional activity?
- How do audiences decide on their viewing and therefore what is the role of promotional activity?
- Which type of activity is seen positively and which is seen more negatively?
- When is promotional activity seen as useful? For example, do audiences see a promotion related to the preceding programme more positively than general umbrella promotions of the range of channels offered by a broadcaster?
- Are there any concerns that promotional activity within a programme compromises programme quality?

The research considered promotional activity across a range of channels, both analogue and digital. The definition of promotion used in the study has been summarized below:



## Methodology

The research consisted of two parts; qualitative and quantitative research. Independent research agency, The Knowledge Agency, was commissioned to conduct the research on behalf of Ofcom.

### Qualitative Research

The qualitative research consisted of a series of 90-minute group discussions conducted in February 2005, with a mix of different types of viewer, across a range of UK locations (see figure 1, below).

In order to raise awareness of promotional activity and the different types of promotions transmitted the following techniques were used:

- Example video clips of each different type of promotional activity (across a range of channels) were used as specific stimulus to discussion
- Respondents were asked to complete a diary in the days leading up to the group, where they logged examples of promotional activity they had seen, and their attitudes to them
- Two moderators were used in parallel to combine the benefits of group discussion and depth interviews from the same set of respondents – each respondent left the group in turn to be interviewed one-on-one for 10 minutes. The depth interviews focused on the specific issues that emerged in their viewing diaries

The sample was structured to broadly reflect the UK population. 10 mixed sex workshops, split by age/lifestage, social grade and location, were completed. Separate groups of viewers from multi-channel and terrestrial-only homes were conducted.

**Figure 1: Structure of focus group sample**

Group	Age/Lifestage	Social Grade	TV Status	Location
1	Pre-family:16-24	ABC1	Multichannel	London
2	Pre-family:16-24	C2DE	Terrestrial	Edinburgh
3	Young family: 25-34	ABC1	Terrestrial	Oldham
4	Young family: 25-34	C2DE	Multichannel	Nottingham
5	Older family: 35-50	ABC1	Multichannel	Cardiff
6	Older family: 35-50	C2DE	Terrestrial	London
7	Empty nesters: 50-65	ABC1	Terrestrial	Belfast
8	Empty nesters: 50-65	C2DE	Multichannel	Edinburgh
9	Retired: 65+	ABC1	Multichannel	Oldham
10	Retired: 65+	C2DE	Terrestrial	Cardiff

### Quantitative Research

Some of the core issues identified in the qualitative research were subsequently quantified via a separate survey. The fieldwork for this was conducted between 11th and 13th March 2005 via BMRB's Access Telephone Omnibus Survey.

A total sample of 1,096 people, demographically representative of the UK adult population (aged 16+) was interviewed.

This survey included interviews across all four nations: England (842 interviews), Wales (58 interviews), Scotland (96 interviews) and Northern Ireland (100 interviews). The final sample was weighted to reflect the actual population distribution across the four nations.

This report details both the qualitative and quantitative findings. The tables and charts in the body of this report refer to the quantitative element of the research.

***Research note: Comparing qualitative and quantitative results***

Across the majority of the findings, the omnibus survey results support those from the focus groups. There are however differences on some issues and these are highlighted within the body of the document.

These differences are likely to be attributable to the variation in methodological approach – the focus groups involved a much longer discussion of the issues as well as respondents spending time before the groups thinking about the relevant issues.

As the groups confirmed, promotional activity is not top-of-mind. The use of viewing diaries made respondents more aware of the presence of programme promotions - something to which many of them had been previously unaware. Therefore the depth provided by the discussions in the focus groups gave a strong understanding of attitudes towards promotional activity and enabled these attitudes to be put into context.

## Section 3

# The role of promotions in viewing strategies

### Viewers use promotions extensively to help plan and shape their viewing choices

All participants in the focus groups claimed that they had at some point changed channel (or wanted to) led by a promotion.

Promotional activity was considered useful and helped viewers plan their viewing ahead of time, provided timely reminders and encouraged spontaneity, by inspiring people with ideas for what to watch next.

Many participants, especially those over 25, described how they used promotions in tandem with listings (most often those from weekend newspaper supplements) to reinforce and illustrate earmarked viewing. The role of listings and promotions in giving advance warning of an interesting programme and in providing the final tipping point to view were interchangeable.

*“They are very important tasters”*  
(25-34 multi-channel)

*“You get the magazine, but when you see it on TV you say I’ll watch that”*  
(50-64 terrestrial)

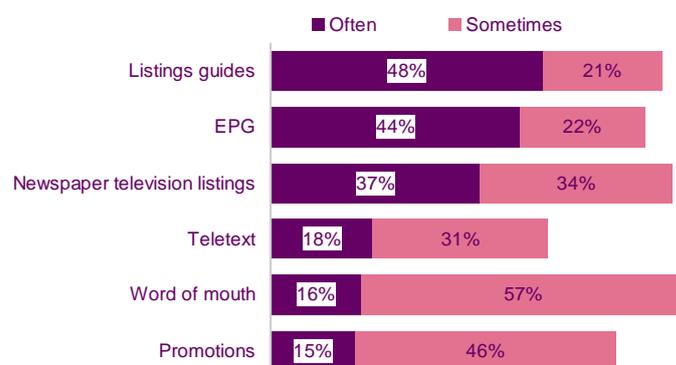
*“They whet my appetite ... visually easier than reading about it ... I depend on the promotions”*  
(65+ terrestrial)

*“Clips (Country Castles) made me reach for the TV Times and highlight it”*  
(50-64 multi-channel)

The quantitative research reinforced this finding – suggesting that promotional trails are a significant part of a multi-faceted approach to planning people’s viewing. 61% of all viewers claim that they ‘often’ or ‘sometimes’ use promotions to help them decide what to watch on television (Figure 2).

**Figure 2**

### Frequency of using programme information to inform viewing



*How often do you use this to help you decide what to watch on television?*

Base: UK adults aged 16 or over (1,096)

Note: figures for EPG usage are based on digital households only

Claimed usage of promotions is higher in multichannel homes than terrestrial homes, with individuals in terrestrial homes more likely to use listings guides (Figure 3).

**Figure 3**

### Frequency of usage of programme information

% using often or sometimes	Digital	Analogue-terrestrial only
Word of mouth	76%	69%
Newspaper television listings	71%	71%
Listings guides	66%	77%
Promotions	65%	55%
Teletext	49%	52%
EPG	66%	

*How often do you use this to help you decide what to watch on television?*

Base: UK adults aged 16 or over (1,096)

Note: figures for EPG usage are based on digital households only

### Promotions stimulate choice between channels and programmes

Across the focus groups promotional activity by broadcasters was felt to fit contemporary lives well where choice of viewing is growing but time to peruse that choice is shortening.

*"[With promotions] everything is useful in a way ... they keep your mind alert ... promotions are an art"*  
(65+ multi-channel)

The use of viewing diaries made respondents more aware of the presence of programme promotions - something to which many of them had been previously

unaware. On detailed consideration, they were seen as primarily useful in the widening television landscape and suited a faster pace of life with less time to plan, acting as both teasers and reminders.

Indeed there appeared to be an expectation that major new prime-time programmes will be heavily trailed. For most respondents, Sunday and Monday nights were seen as the major points in the week for this kind of ‘must-see’ television.

*“Joey ... I’ve seen it [trailed] so often ... I’m expecting it to be good”*  
 (16-24 terrestrial)

*“A lifesaver ... I didn’t realise ‘24’ was back on ... I went straight onto it”*  
 (65+ multi-channel)

Focus group discussions indicated that promotions are helping to increase the diversity of viewing habits by leading people to programmes that might have otherwise been missed or passed by, both within and across channels.

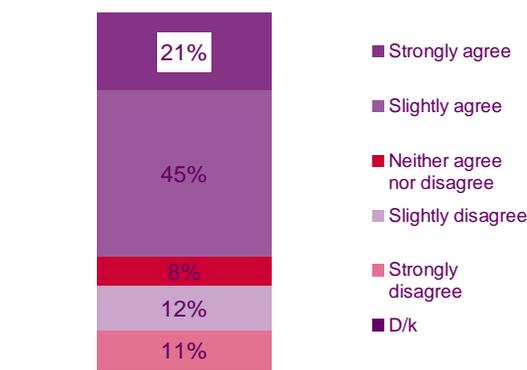
*“It’s a way in to people for what they’d not normally watch”*  
 (50-64 terrestrial)

*“Secret Lives ... the title didn’t jump out at me but the clips made me want to watch”*  
 (25-35 terrestrial)

This is reinforced by the findings of the omnibus survey, where two thirds of respondents credit promotions with helping them discover and enjoy programmes they would otherwise have missed (Figure 4).

**Figure 4**

***“Promotions and trailers have helped me discover and enjoy programmes I would have otherwise missed”***



Base: UK adults aged 16 or over (1,096)

### **Promotions help to make television a less passive experience**

Promotion-led use of interactive television, and television-related web sites was mentioned spontaneously in many of the focus groups.

Interactive television was used for accessing “behind the scenes” type information (e.g. Spooks, I’m a Celebrity...), for enhanced sports coverage (scores, highlights) and for games and quizzes (CBeebies, Test the Nation).

The internet was used for more detail in support of programmes about which viewers felt passionate (e.g. Auschwitz, Antiques Roadshow).

The promotion of helplines particularly in relation to important social issues covered in soaps such domestic violence, rape, alcohol abuse, etc. was applauded.

*“Programmes may have brought it [a trauma] from the back of your mind so it’s good that support is there and then”*  
(25-35 terrestrial)

*“It’s about setting ethical standards”*  
(16-24 multi-channel)

### Promotions for programmes up to seven days ahead are seen as most useful

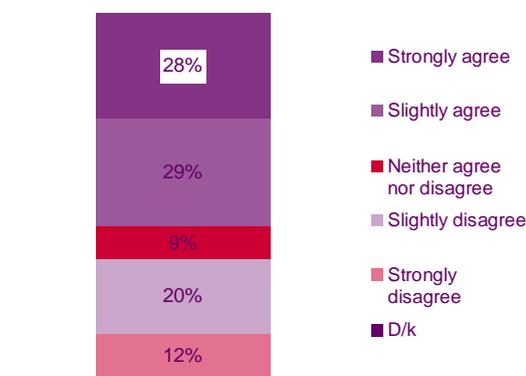
In the focus groups, viewers claimed that they like to plan television viewing up to seven days in advance, seldom more. Younger viewers (under 25 years of age) claimed to plan on a much more short term basis (up to 2 days), if at all.

Same or next day promotions were almost universally seen as useful practical reminders, and post-programme “same-time-next-week” trailers were generally liked as reinforcement of content and time slots.

Most participants were happy with promotions for programmes up to seven days ahead being shown, though few saw much value to the viewer in promoting programmes further ahead. The omnibus data shows 59% of respondents agree that they do not find promotions for programmes more than seven days away useful (Figure 5).

**Figure 5**

*“I don’t find promotions and trailers for programmes that are more than a week away useful”*



Base: UK adults aged 16 or over (1,096)

However, some respondents later changed their minds when discussing subjects that particularly interested them (e.g. sport) which they claimed to be happy to see trailed for weeks beforehand to build anticipation.

*“The Rugby. The anticipation! I’m like a little boy waiting for Christmas”*  
(65+ terrestrial)

Less specific “Coming soon...” messages were felt to annoy rather than tease as viewers would welcome more explicit information.

## Section 4

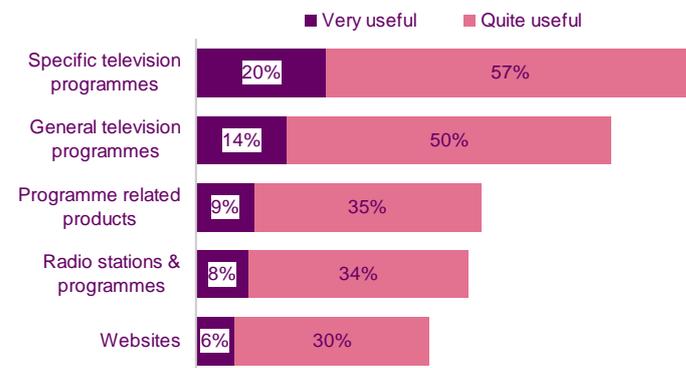
# Attitudes towards different types of promotion

## Programme-specific promotions were seen as most useful

Respondents in both the qualitative and quantitative research expressed a strong preference for promotions for specific television programmes. 77% of survey respondents describe these as either very or quite useful (Figure 6).

Figure 6

### Strong preference for programme specific promotions



*How useful do you find this when deciding what to watch on television?*  
Base: UK adults aged 16 or over (1,096)

Clip-based trails, predominantly for drama programmes were consistently played back by the focus groups as most memorable and useful. Specific programmes names including *Head of the Class*, *Dalziel and Pascoe*, *Desperate Housewives* were spontaneously mentioned by groups participants.

## Cross promotion between channels provokes mixed feelings

Cross channel promotions were broadly welcomed by multi-channel focus group respondents in particular. Many enjoyed the benefits of guided choice and personal control. Cross promotions between BBC1 and BBC2 were useful and fully acceptable to both terrestrial and multi-channel viewers.

Themed links to related programming were most appreciated (e.g. from one history programme to another). Promotions seen as “selling” other services were felt to be annoying but, on the whole, accepted by respondents as something one would expect in a competitive marketplace.

## Digital-only content promotions led to discomfort among terrestrial viewers

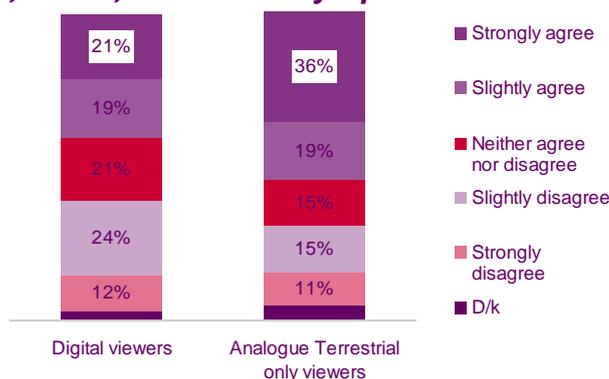
In the terrestrial only groups, digital programming promotions (e.g. BBC4 programmes trailed on BBC1/2) were felt to be reminders to those who were frustrated by lack of access to digital television. Some respondents were concerned that they would be missing out on programmes and that much of the ‘best television’ will be paid for in the future.

*“We only have Council Telly, not digital or ITV2 ... my friend who lives in a flat hasn’t got the option ... he says don’t even mention it ”*  
(25-34 terrestrial)

This was confirmed by the omnibus survey, where over half of terrestrial only viewers (55%) claim to be irritated by promotions for channels they cannot receive (Figure 7). 40% of those with access to digital television also claim to be irritated by promotions for channels they do not have access to – this may be related to the platform they have access to or the package they subscribe to.

**Figure 7**

***“I’m irritated by promotions and trailers for programmes on digital channels that I cannot receive, for example, E4, BBC3, ITV2 and Sky Sports”***



Base: UK adults aged 16 or over (1,096)

This was most frustrating to those in family lifestages, who said they felt child and peer pressure to upgrade. They claimed lack of access to digital channels created embarrassment. Some gave examples of how they felt on the edge on conversations at work or intense ‘pester power’ from their children for what they see promoted at home or at friends’ houses (e.g. CBeebies, Nickelodeon).

*“Nanny 911 looks good ... you feel inadequate ... can’t get with it ... find yourself in a minority of parents at work”*  
(25-34 terrestrial)

*“It says ER on E4 now ... I feel in a minority ... people talk about it at work, they spoil it and you’ve got to wait”*  
(35-50 terrestrial)

These negative emotions among terrestrial respondents were compounded by a low level of knowledge of Freeview. Many knew little about channel availability or the associated costs.

*“I’ve never seen a promotion for Freeview ... terrestrial hasn’t pushed it. Sky is pushed... they stop you in booths on the street in Oldham, tempting kids with SpongeBob SquarePants”*  
(25-34 terrestrial)

However, many of those terrestrial only viewers who were more tolerant of these trails described themselves as switching off to these messages – either mentally or literally.

### **There is evidence that promotions for digital content/channels encourage switchover**

Despite some negativity towards promotions for digital channels or content, some of the respondents in the focus groups claimed to have been influenced sufficiently to consider switching to digital.

*“I’d watch repeats on ITV2 ... my favourites ... Frost, Midsummer Murders ... one of these days I’ll get a box”*  
(65+ terrestrial)

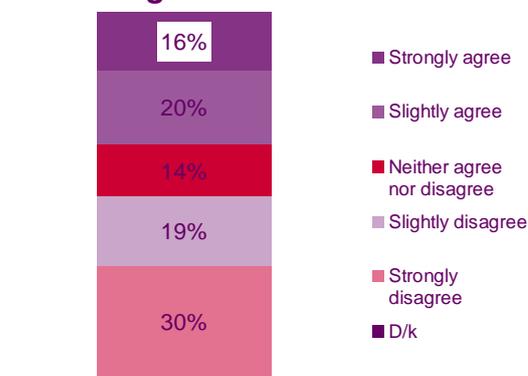
*“With Trish it says go to ITV2 for behind the scenes ... I’d love to ... you think you’re missing out ... it’s annoying”*  
(25-34 terrestrial)

*“The good things are going to BBC4 like nature - ‘old BBC2’ we call it”*  
(50-64 terrestrial)

The omnibus survey supports this finding. Around a third of digital viewers interviewed claim that promotions for new channels had played a part in persuading them to switch (Figure 8).

**Figure 8**

***“Seeing promotions for programmes or channels I could not previously receive helped persuade me to switch to digital television”***



Base: UK adults aged 16 or over in digital households (689)

## **General channel and corporate promotions were accepted as a necessary part of competition between broadcasters**

Participants in the focus groups accepted channel and corporate promotions as the natural product of competition between broadcasters.

*"It's the political reality ... not worth banning"*  
(65+ terrestrial)

Some people described a more positive brand re-enforcement role for channel promotions, providing a "comfortable locked in feeling" for an evening, and reinforcing the sense that a channel is in tune with its viewers' tastes. Many recognised that corporate promotions (and especially channel idents) were designed to support a strong brand image and offering.

*"If this is what our promotions are like imagine what our programmes are like"*  
(16-25 terrestrial)

*"They're trying to make you forget there's something on the other side as much as promoting what they're for ... but none irritate me"*  
(35-54 multi-channel)

## **Participants saw few benefits of radio promotions on television**

In the focus groups there was little recall of radio promotions on television - and none beyond promotion of football commentary on BBC 5-Live.

Participants did not see the point of such promotions, given that they did not see that television viewing and radio listening were interchangeable within daypart, in the same way as switching television channels. For example, nearly all claimed not to listen to the radio in the evening – their peak viewing time.

However, there was some interest in learning more about digital radio from the television, especially among digital viewers who were aware of their ability to access radio stations via their multichannel platform.

## **Web promotion appealed to respondents as a way of furthering interests**

References to web sites at the end of programmes were familiar to most participants in the focus groups. A significant minority had visited specific web sites as a result and many others were tempted.

Such links were felt to provide welcome opportunities for television-complementary activities, especially for children and school work.

*"I use with my 9 year old ... we sit watching with the laptop"*  
(25-34 terrestrial)

*"My son takes down web addresses to do things for school ... we've not got the Net"*  
(35-50 terrestrial)

Leads to relevant web sites from documentary and lifestyle programmes were also felt to support people with their hobbies and personal interests, and in planning holidays.

*"More useful than the red button ... you go at your own pace"*  
(35-50 multi-channel)

Where promoted only by a caption, the majority of web-site promotions went unnoticed – promotions where the viewer's attention was drawn to them by a voice-over were felt to be more effective.

The promotion of web sites provoked negativity among a minority within the terrestrial post-family groups. Rather like promotions for digital channels, this type of promotion compounded the focus group respondents' frustration at lack of access to the internet and lack of confidence and opportunity to learn to use it.

*"It's annoying ... I haven't got one to log on to ... they used to give telephone numbers too ... let's face it, we're dinosaurs"*  
(65+ terrestrial)

*"The young tend to take over with equipment so you never learn"*  
(50-64 terrestrial)

### **Promotions for books, DVDs and magazines are acceptable to most**

A notable minority of participants in the focus groups had bought programme-related products (e.g. books, magazines, DVDs) promoted on television. On the whole this type of promotion was seen as supportive to the programme they accompanied, like web, interactive television and helpline promotions, providing worthwhile opportunities to access more information and depth of subject coverage.

*"The BBC responding to public demand"*  
(50-64 terrestrial)

There were also more practical applications to this type of product - catching up on missed series via DVDs, gift ideas, etc. Options to buy direct by telephone and on-line were even seen by some to offer real benefits, reducing missed opportunities.

*"I never go to WH Smiths"*  
(35-50 terrestrial)

A very small minority objected to, what they described as, "the BBC plugging products", feeling it was inappropriately commercial. There was marginally more concern about promotions leading people to specific retailers – it was felt that care should be taken not to suggest "only available here".

*"Channel 4 says go to our shop (not other shops) ... so you'll browse and buy other stuff"*  
(16-24 terrestrial)

Finally, the current style of these promotions (which makes them distinct from other “product” advertising) was considered entirely appropriate. It was felt best to keep these promotions brief - a short end of programme sell that is easy to pass over for those not interested in the product mentioned.

### **Viewers prefer promotions offering “taster clips” of the programme trailed**

Promotional activity on-screen is an effective way of raising awareness and deepening interest in new and existing programming. However, the focus group respondents felt that promotions did not always make full use of the medium; where possible they prefer ‘taster clips’ of programme footage and on-screen visuals of times and channels rather than just voice-overs.

Programme trails using clips with high production values are the most enjoyed and easily digested promotions; it was felt they work on their own, and help to bring listings alive, in appealing ways.

Certain promotions were picked out in the focus groups as being enjoyed as entertaining content in their own right – they were felt in some cases to have higher production values than the programmes they were promoting.

The specific elements of promotions that acted as a hook were recognisable star actors, sensational storylines, links to known events, and returning favourite series.

*“I watched Julie Walters because of the [trailer] programme. It let me know when it was on and that it was a true story ... my paper also said must see”*  
(50-64 terrestrial)

*“CSI was tense and intriguing ... some are better than the programmes!”*  
(16-24 terrestrial)

Participants discussed enjoying a diversity of programme promotions. It was felt that ideally promotions should provide links to related programmes and clever lateral links that ‘read and feed’ viewers’ tastes, which interactive television and the web help to make possible.

Some promotions were felt to suffer from being too fast or from ‘information overload’ where two or three pieces of information were shown at once, particularly on split screens. Older viewers complained that they struggled to process the information so that they could remember any of the promotions.

*“Kids can take it ... I can’t”*  
(35-50 multi-channel)

*“Not enough time to write it down or absorb it”*  
(65+ terrestrial)

*“I have to close my eyes ... a going-too-fast-for-us feeling”*  
(65+ terrestrial)

## Section 5

# Positioning of promotions around programmes

### **Most people accept promotions in breaks between programmes and over end credits**

Participants felt that promotions at the end of programme breaks and/or over credits suit a change in mood and a comfortable point at which to consider one's next viewing.

End credit promotional activity was seen as a timely, acceptable norm for the majority of participants in the research. These promotions were generally felt to be reasonably subtle, easy to ignore if so desired, and were liked because they didn't take up time in commercial breaks between programmes.

*"It's idle time in the end credits turned into selling time ... I don't mind"*  
(16-24 terrestrial)

An older minority were more concerned about being able to read or focus on anything, and this type of promotion led to accusations of the on-screen information becoming illegibly small, and the screen too busy with two or three pieces of information running in parallel.

One or two participants across all ten focus groups wanted the credits left untouched, as they were interested in the information contained in the end credits about actors and programme makers, and felt that this information was not being treated with due respect and attention.

### **Mid-programme commercial-break promotions were seen as more intrusive, and were generally not welcomed**

Many participants in the qualitative research had not previously noticed centre-break promotional activity. Most of those that had, objected to it and many of those to whom only the research identified this as an issue shared their concern.

Participants felt such activity was interfering with the flow of viewing and mood of a programme - making it easy to lose the thread of a programme. There was a feeling amongst focus group respondents that the inclusion of centre-break promotions meant commercial breaks were getting longer and that they were losing out on programme content.

*“It’s more waiting to get back to what I’m watching ... I timed Coronation Street ... there’s only 20 minutes of programme ... it feels like less ads and more trails”*  
(25-34 multi-channel)

The quantitative research (where people were less considered about the various types of promotion due to lack of pre-tasking) suggests that people are more accepting of promotions in the mid breaks in programmes – with attitudes broadly similar to those for promotions during centre-breaks and over the end credits of programmes (Figure 9).

69% of adults say they either welcome or are not bothered about promotions over end credits and 17% object to them – this objection is skewed towards 45-54 year old viewers (22%) and AB viewers (21%). 73% of respondents welcome or say they are not bothered about promotions positions in end-breaks – 17% object to this type of activity and this is skewed by viewers aged 65 or over (25%).

23% of respondents object to centre-break promotional activity – this is again biased towards older viewers (26% of 55-64 year olds and 31% of viewers aged 65 or over). 39% of respondents say they object to promotions within programmes – this is skewed towards viewers aged 45-54 (47%), 55-64 year olds (44%) and AB viewers (46%).

**Figure 9**

### How do you feel about trailers and promotions appearing during this time?

	Over the end-credits of a programme	In the breaks <u>between</u> programmes	In the breaks <u>during</u> a programme	Within the body of a programme
<b>I welcome them</b>	12%	16%	12%	4%
<b>I’m not really that bothered</b>	57%	57%	55%	40%
<b>I object to them</b>	17%	17%	23%	39%
<b>I’ve never noticed them</b>	13%	9%	9%	15%

Base: UK adults aged 16 or over (1,096)

### A majority accepted within-programme promotions as they currently operate

In-programme promotional activity was felt to be in its infancy. Viewers in the focus groups were relaxed about its use, though not everyone had experienced or noticed it.

Although the omnibus research suggests (Figure 9) that almost 40% of people actively object to the principle of within-programme promotions, none of the focus group participants felt that they had seen any evidence of programme quality or integrity being compromised in practice.

To date, programmes are felt to have promoted other programmes they are well matched to, and the authority of some programmes such as news bulletins has had a sanctioning role - e.g. Panorama promoted by BBC News.

## Section 6

# Promotions on different channels

### **BBC promotions were perceived to stand out more, due to lack of commercial activity and production quality of promotions**

It was felt in the focus groups that promotions were more noticeable on the BBC because...

- The BBC carries no other advertising
- Many BBC promotions have memorable, watchable, high production values
- The BBC promotes a broader range of promotional messages than its competitors

Respondents thought that the BBC had to promote more to compete given the level of competition in the television marketplace. The volume of promotions on the BBC was not considered to be appreciably greater or less than on other channels, and this was generally felt to be the right balance.

### **Sky news and sports promotions were noted by some as exciting and innovative**

Multi-channel viewers in the focus groups singled out Sky's news and sport promotions for particular praise. Participants suggested this reflected the innovative approach that Sky has brought to coverage of these genres more generally.

### **Sky, ITV and Channel 4 promotions were all felt to have improved in production quality**

Participants in the focus groups felt that the quality of promotions on television had improved.

This was felt to be a function of increased competition between broadcasters, trying to cut through a greater volume of trails, and working hard to cut through large quantities of commercial advertising.

### **Smaller channels were seen as promotionally disadvantaged but this was not a reason to restrict promotional activity across bigger channels**

Participants in the focus groups recognised that digital channels owned by the main terrestrial network, such as BBC3, ITV2 and E4 have access to promotional platforms that give them an advantage over some of the smaller digital only broadcasters.

However, none of the participants felt that any kind of intervention on behalf of these smaller broadcasters was appropriate, or likely to be beneficial to viewers. Participants felt any rules applied should apply equally to all channels.

*"I've not time to flick through magazines to find out when ER is on, that's just the way it is"*

(25-35 multi-channel)

*"If the BBC had to plug Sky it would be a sign they are insecure ... a very sad day"*

(65+ terrestrial)

## Section 7

# Regulation of promotions

### The current volume of on-air promotions is felt to be acceptable

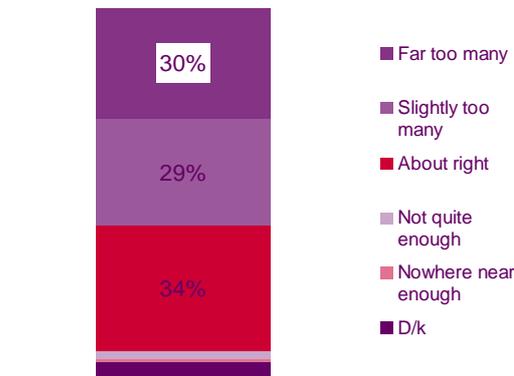
Participants in the focus groups generally felt that the current level of on-air promotions was acceptable. On the whole, participants felt that if a promotion was of no interest to them, it is reasonably easy to ignore, and the overall effect is not particularly detrimental to people's viewing experience relative to the benefits.

However, few if any, were comfortable with the idea of more promotions.

Findings from the omnibus research were more negative. 59% of adults (Figure 10) feel there are too many promotions on television. 30% feel there are far too many. These views were fairly consistent across demographic groups and different types of television households.

**Figure 10**

### 59% of respondents feel there are too many promotions on television



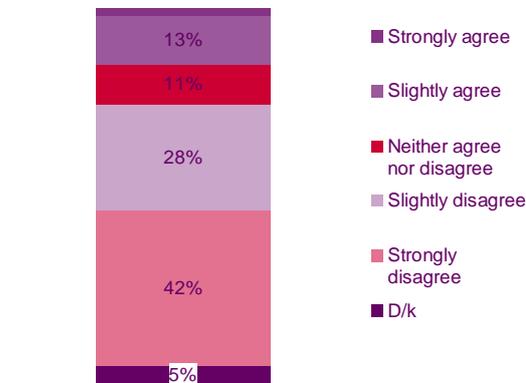
*How do you feel about the quantity of on-air promotions and trailers currently being broadcast on television channels?*

Base: UK adults aged 16 or over (1,096)

The omnibus figures are consistent with the focus groups in terms of people's appetite for more promotions. 17% of adults would be happy to have more and 70% actively disagree with the idea (Figure 11).

**Figure 11**

***“I would be happy for more promotions and trailers to be shown on television”***



Base: UK adults aged 16 or over (1,096)

**The frequency of repetition of individual promotions was a bigger issue**

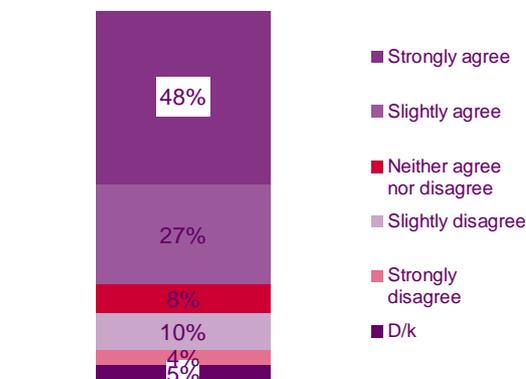
Individual promotions were criticised much more strongly in the focus groups for being over repeated.

Seeing a promotion more than two or three times a night was felt to be irritating. This was felt to happen too often on all channels, but ITV1 was singled out for particular criticism in this respect, with what respondents felt was blanket promotion of its Sunday and Monday evening prime-time programmes.

Again, the omnibus research confirms this conclusion, with 75% of adults agreeing that some promotions and trailers are repeated too often (Figure 12).

**Figure 12**

***“Some promotions are repeated far too much”***



Base: UK adults aged 16 or over (1,096)