

UK audience attitudes to the broadcast media 2015

23 March 2016

- Interviews with a UK representative quota sample of 2,107 adults (aged 16+).
- Survey conducted in four dip-stick waves to counter seasonality issues (February/ May/ August/ November 2015)
- In 2014 and 2015 interviewing was conducted face to face using Computer Assisted interviewing (CAPI)
- From 2008 to 2013 interviewing was conducted face to face using Paper and Pencil interviewing (PAPI) with two waves each year. From 2005 to 2007 interviewing was conducted continuously through the year using CAPI.
- Where shown, dashed lines are used to indicate where there was a change in interview method (in 2008 and in 2014)

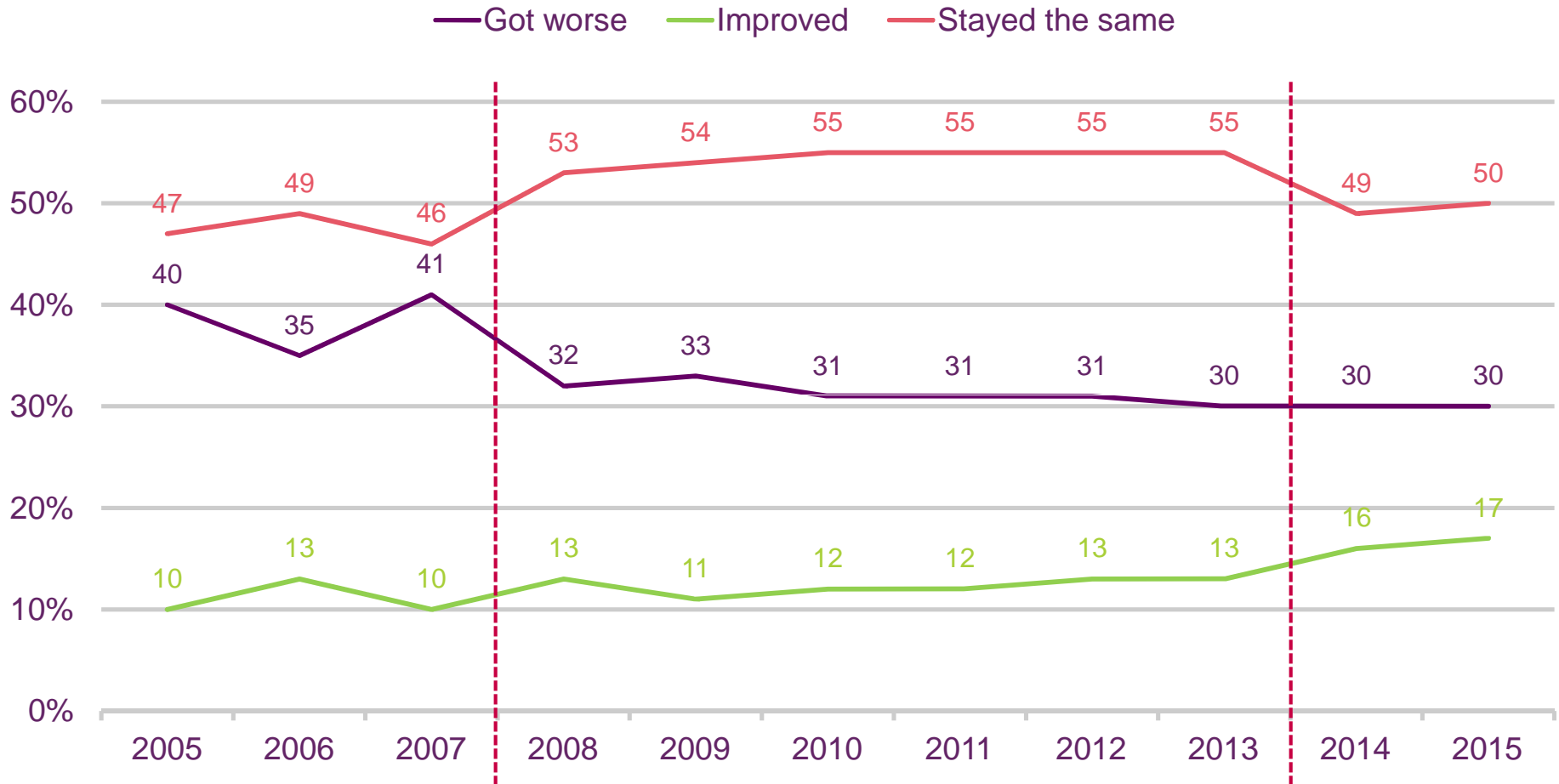
Testing for significant differences ▼▲

- 2014 and 2015 data is tested against each other for any statistically significant differences
- All sub-group data is from 2015 only. Measures for individual age groups (16-34/ 35-54/ 55-64/ 65+) are tested for against the all-adult measure. Testing is also conducted between socio-economic groups (ABC1/C2DE), by gender and between parents/ non-parents.

- Audience attitudes towards programme standards [12:30 – 13:25]
 - Audience attitudes to programme standards
 - Attitudes towards advertising
 - Attitudes towards privacy/ intrusion

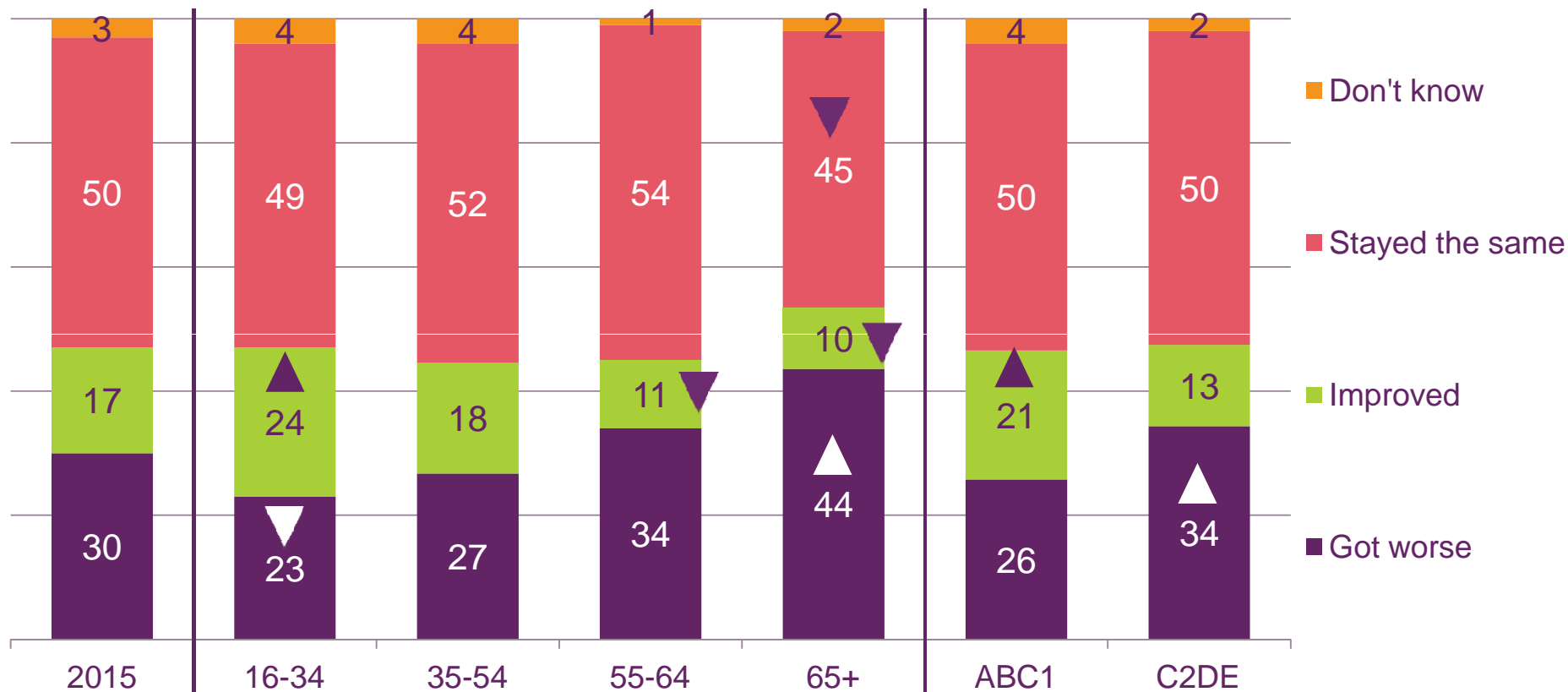
- Protection of children, the watershed and attitudes towards regulation [13:30-13:55]
 - Protection of children and the watershed
 - Attitudes towards regulation

Opinion on the quality of programmes over the last 12 months: time series



Q20 - Do you feel that over the past year television programmes have improved, got worse or stayed about the same?
Base: All with any TV sets (2,052). NB Base prior to 2014: All with TV, but excluding those never watching.
Dashed line to show where survey method changed.

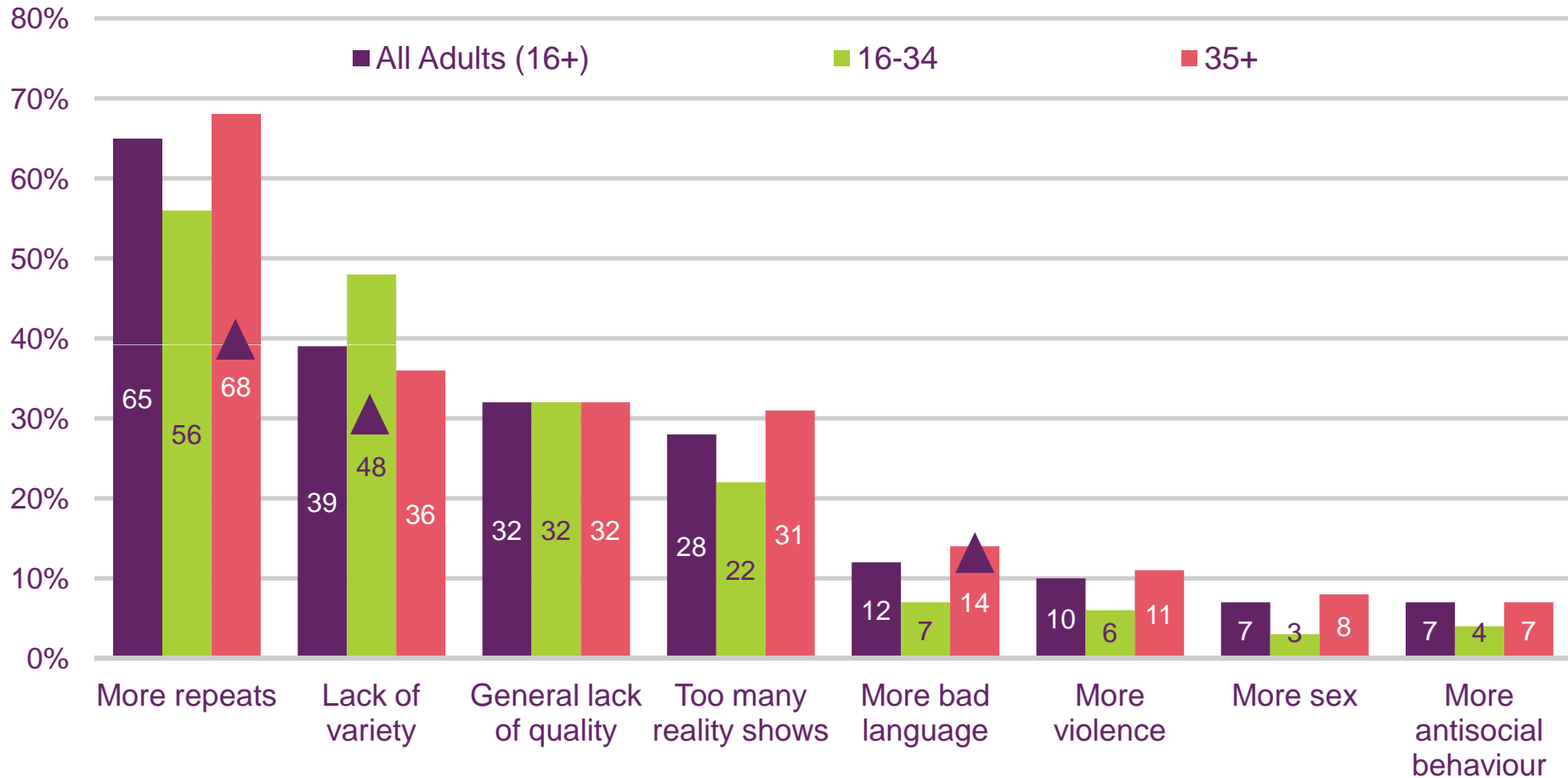
Opinion on the quality of programmes over the last 12 months: 2015 sub-groups



Q20 - Do you feel that over the past year television programmes have improved, got worse or stayed about the same?

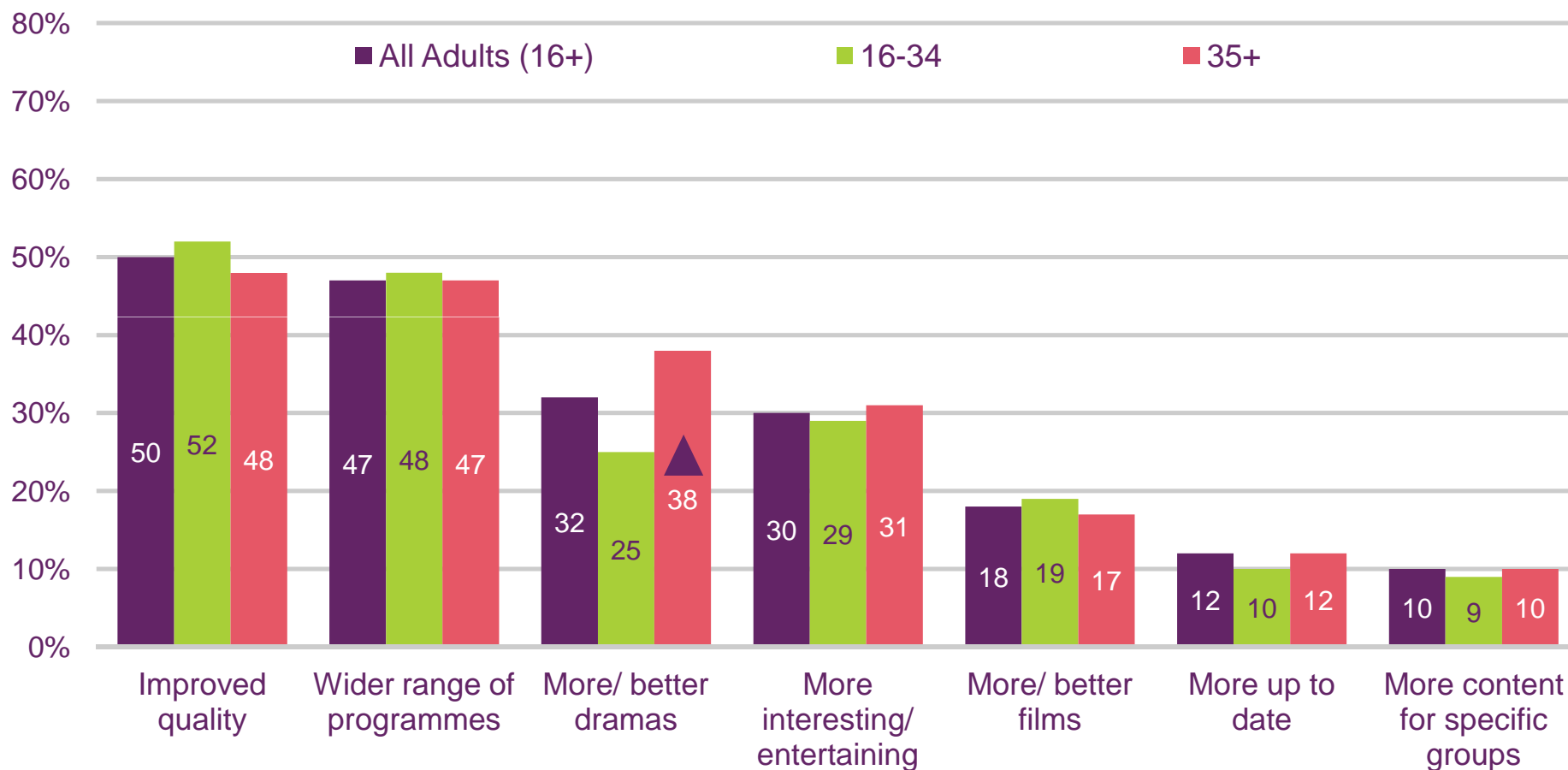
Base: All with any TV sets in 2015 (2,052); aged 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); ABC1 (1,055); C2DE (993).

Top reasons given for programmes getting worse



Q22 - In what ways do you think that the television programmes have got worse over the past year?
 Base: All saying programmes 'got worse' over past year (646); 16-34 (139); 35+ (507).

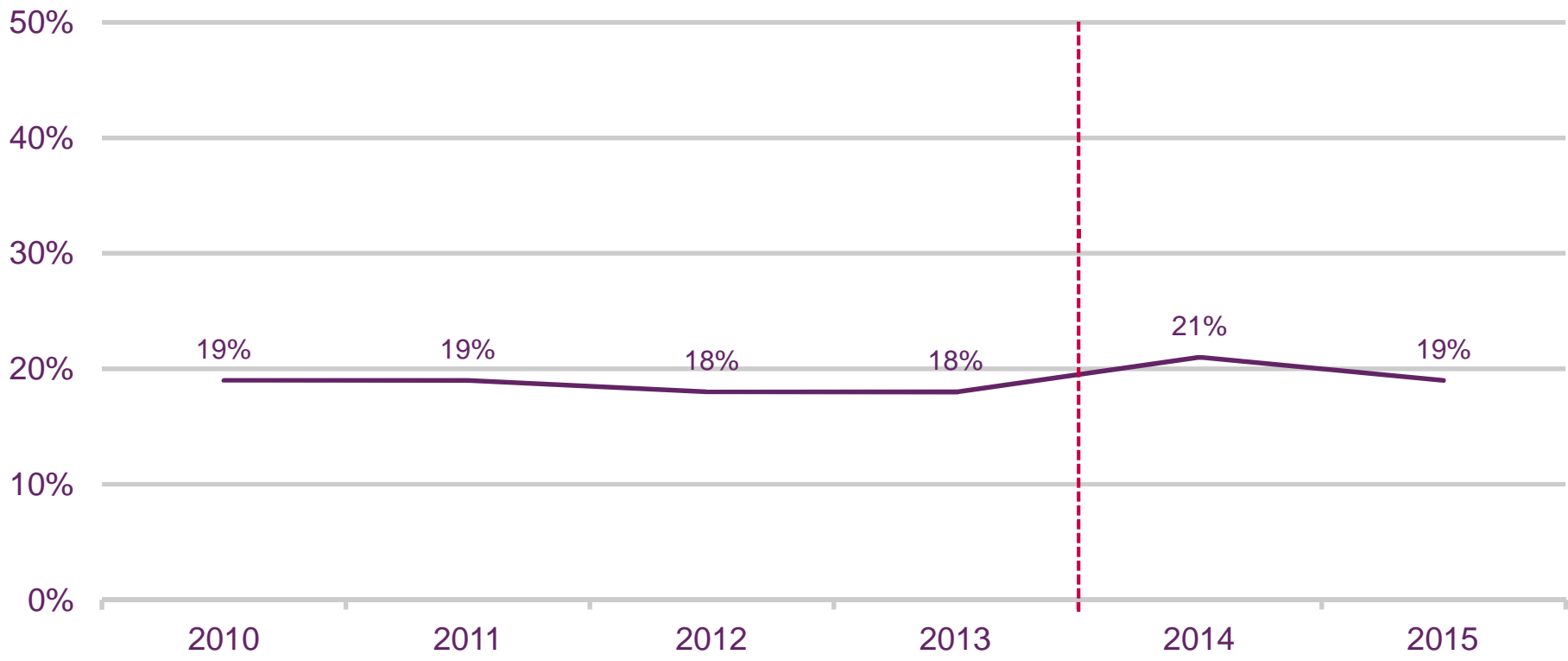
Top reasons given for programmes having improved



Q21 - In what ways do you think that the television programmes have improved over the past year?

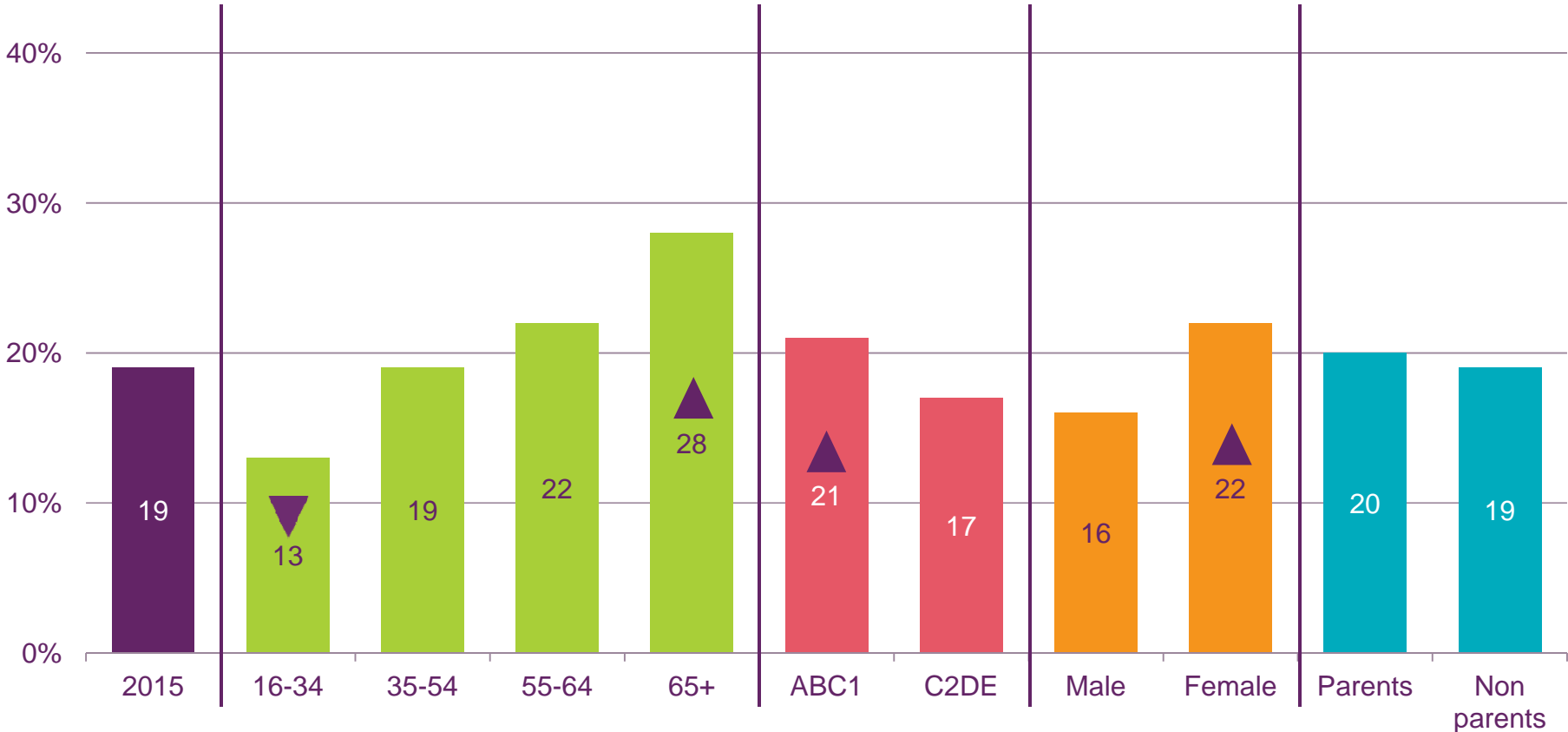
Base: All saying programmes 'improved' over past year (320); 16-34 (130); 35+ (190).

Overall % of respondents who have been offended by something on TV: time series



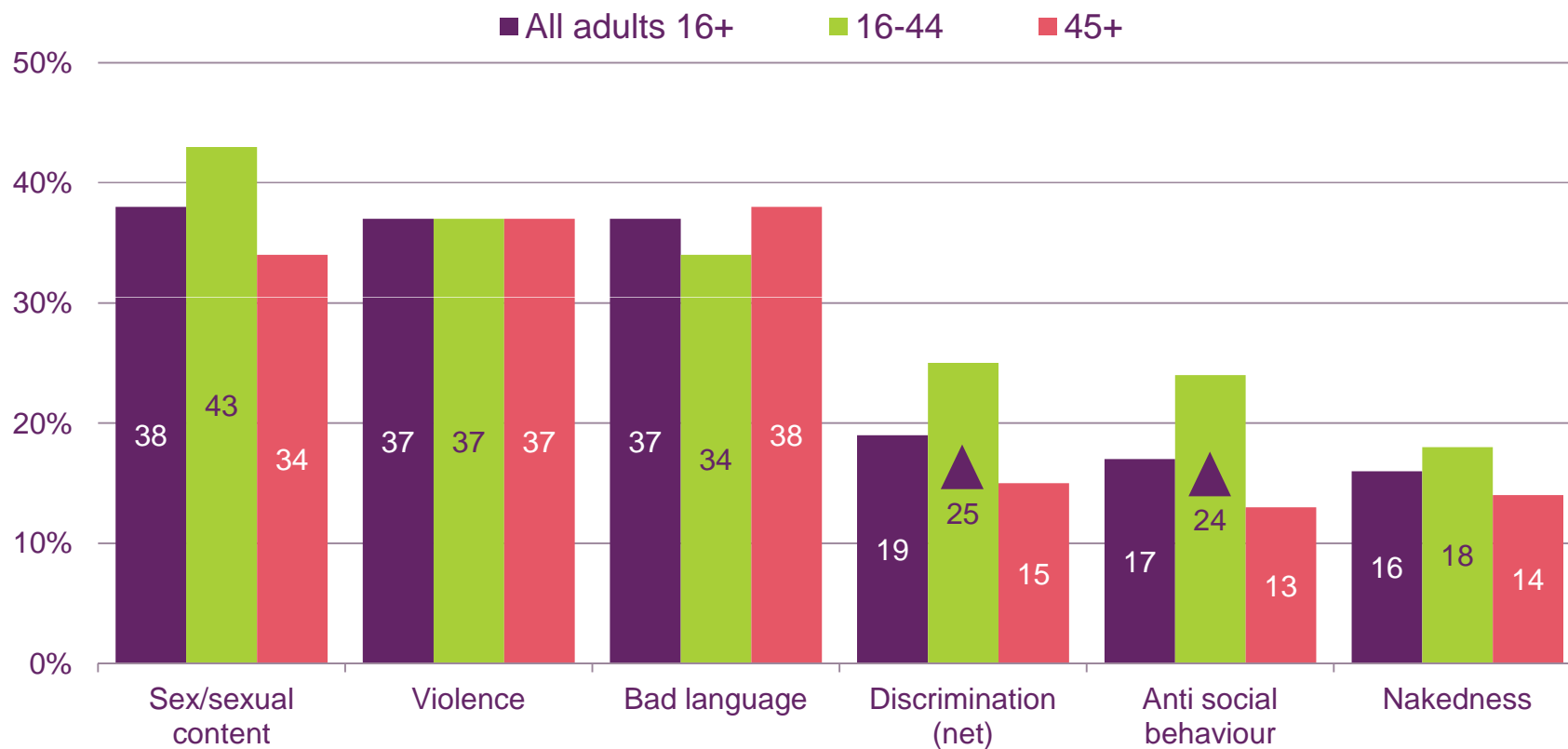
Q41 - In the last 12 months, have you personally found anything on television to be offensive?
Base: All with any TV sets (2,052). Dashed line to show where survey method changed.

Overall % of respondents who have been offended by something on TV: 2015 sub-groups



Q41 - In the last 12 months, have you personally found anything on television to be offensive?
 Base: All with any TV sets in 2015 (2,052); aged 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); ABC1 (1,055); C2DE (993); Male (966); Female (1,086); Parents (594); Non-parents (1,458).

Type of material which offended

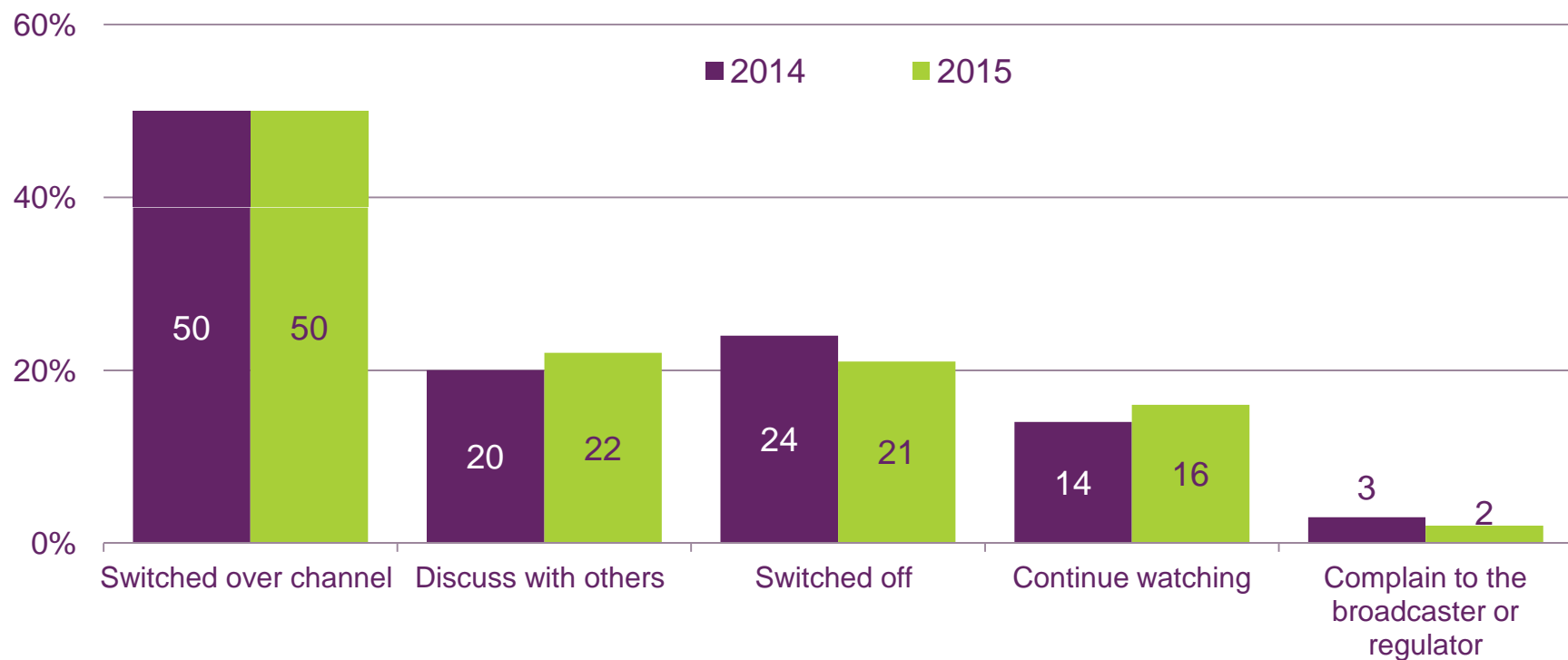


Q42 - What kind of thing offended you?

Base: All who said they'd seen something offensive in last 12 months 2015 (398); 16-44 (139); 45+ (259).

Base too low for analysis of adults aged 16-34 (77 interviews)

Reaction following offence by something on TV



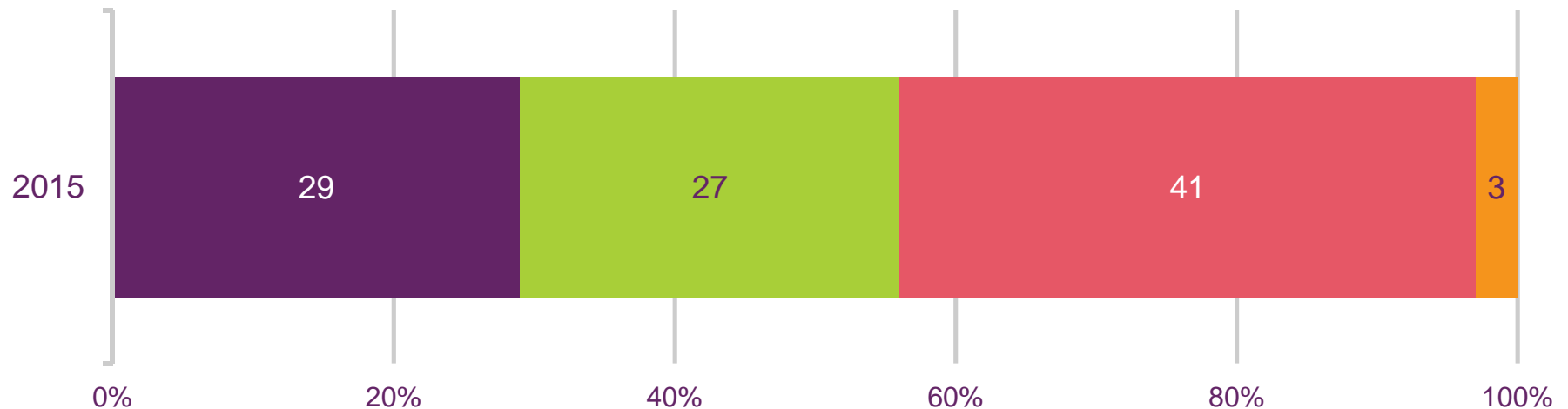
Q44 - How did you react when you were offended by what you saw on television? In other words, which, if any, of these things did you do?

Base: All who said they'd seen something offensive in last 12 months in 2014 (421); 2015 (398).

Attitudes towards offensive material: 2015



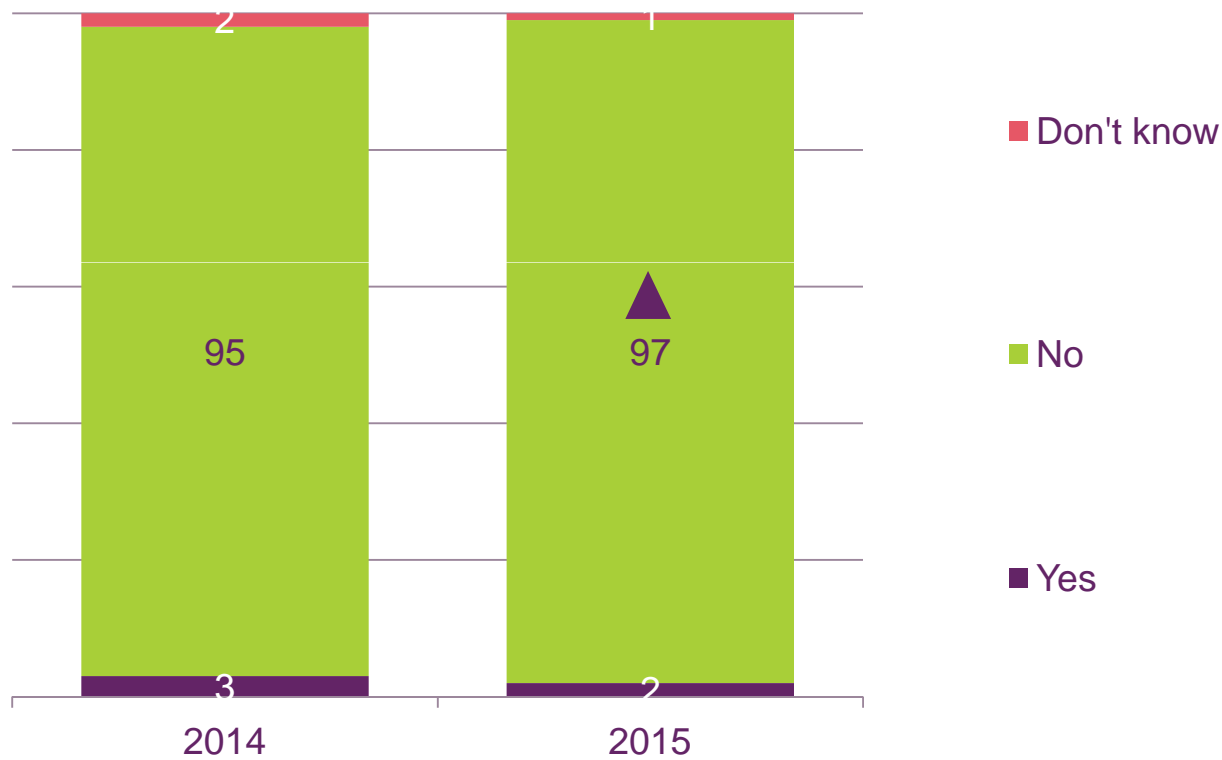
- The things which have personally offended me should not have been shown
- Even though I was offended, I accept that others should be allowed to see these things
- I think such things should only be shown when viewers are likely to expect them (e.g. after a clear warning or on a specific type of channel or programme)
- Don't know



Q45 - Which of these statements best describes your attitude towards the things which have offended you on TV in the last 12 months?

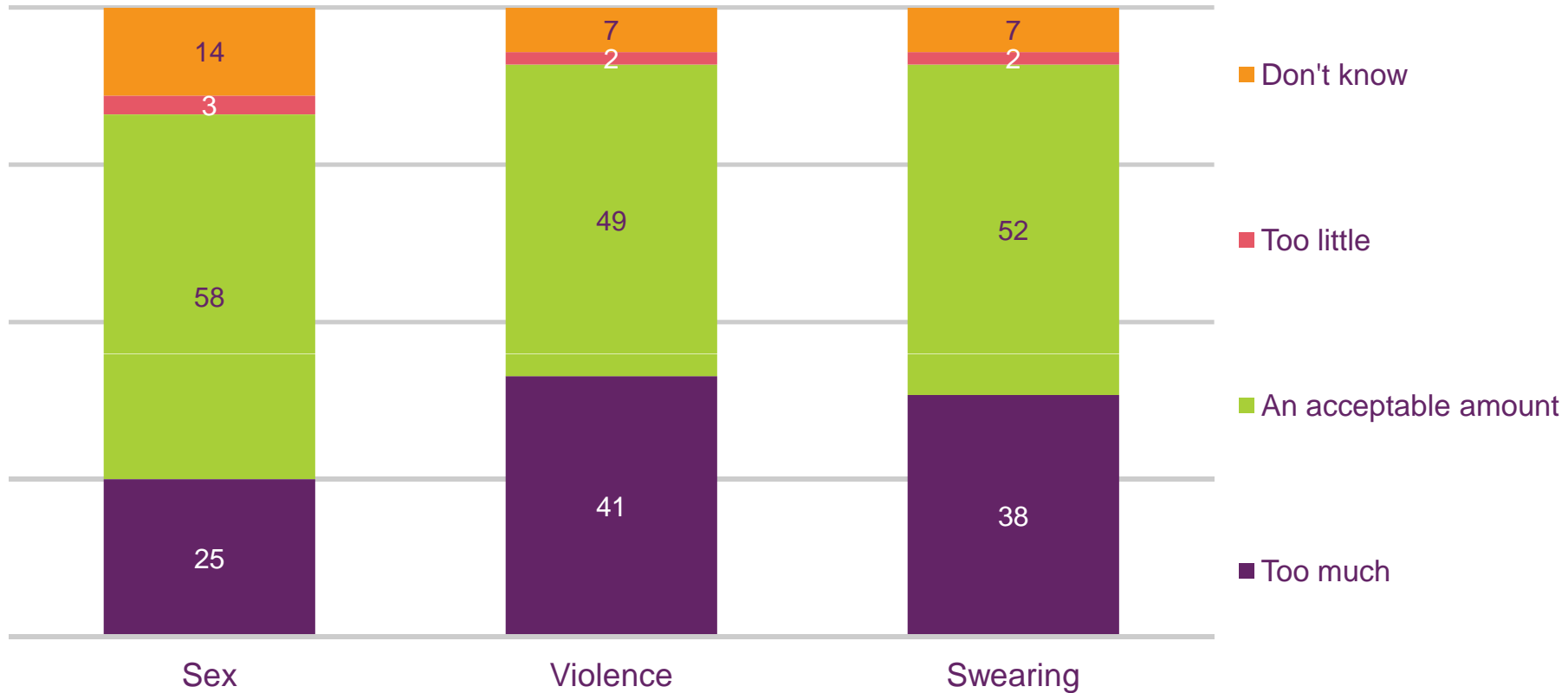
Base: All who said they'd seen something offensive in last 12 months in 2015 (398)

Overall levels of offence on radio: 2014 vs 2015



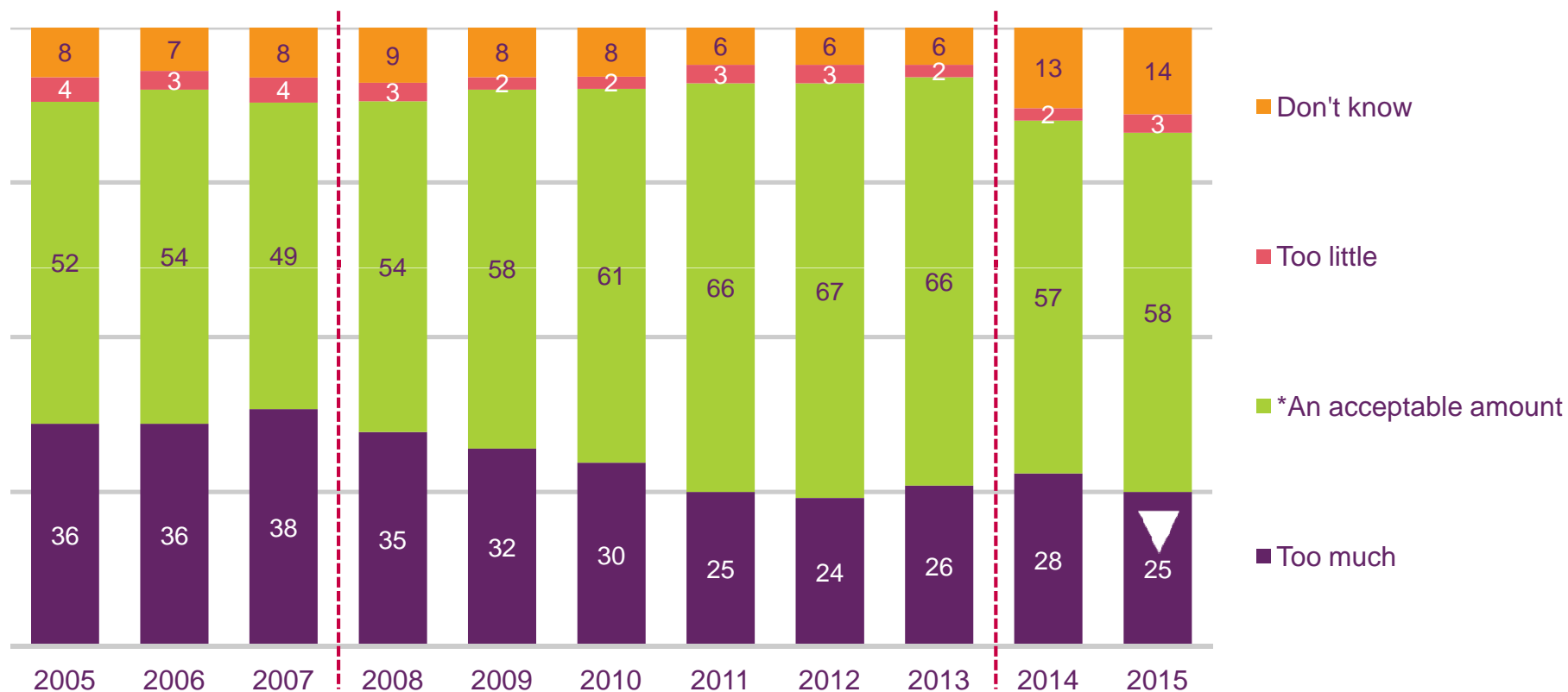
Q61 - In the last 12 months, have you personally heard anything on the radio you found offensive?
Base: All respondents who ever listen to radio in 2014 (1,615); 2015 (1,593).

Opinion on the amount of sex/ violence/ swearing on TV



Q46 - Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television: a) Sex? b) Violence? c) Swearing?
Base: All with any TV sets (2,052).

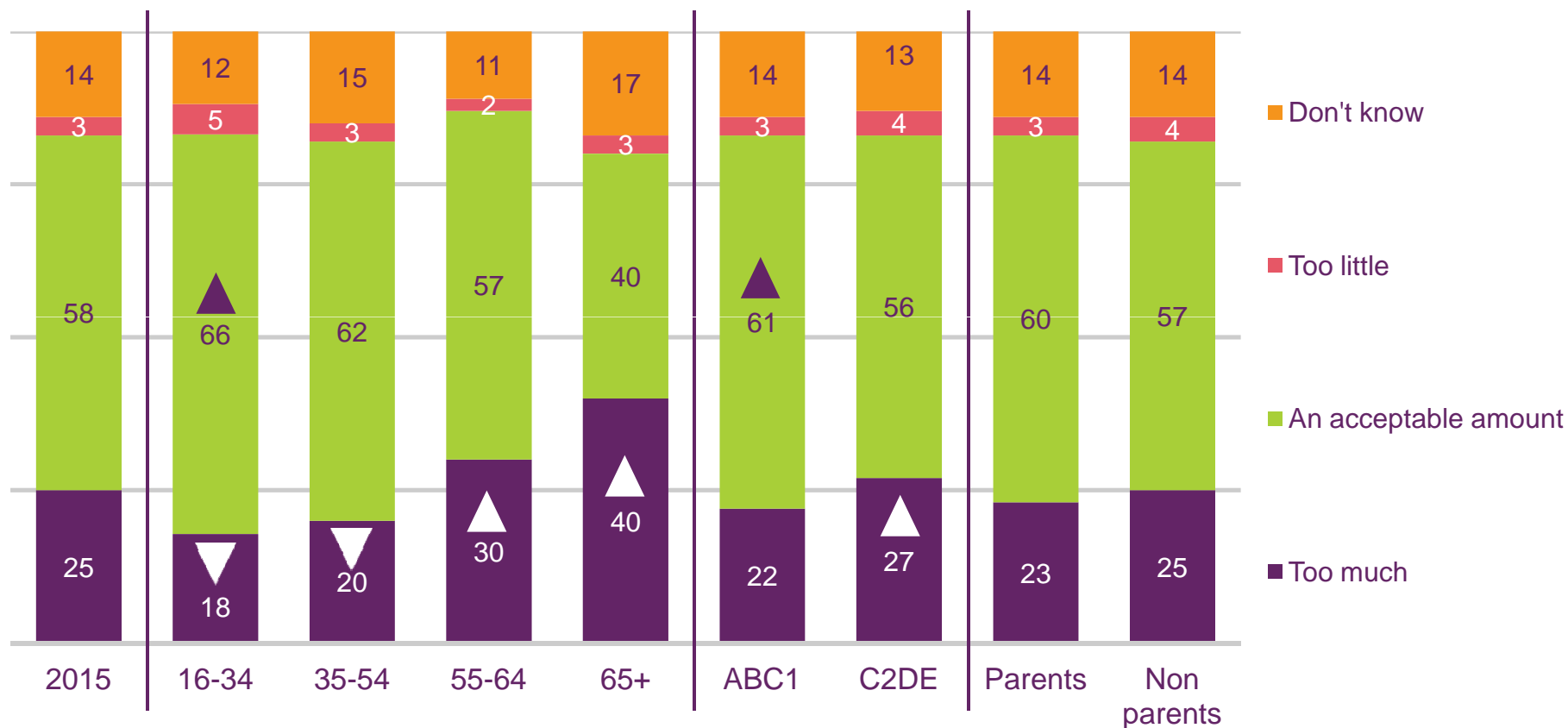
Opinion on the amount of sex on TV: time series



Q46 - Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television:
a) Sex?

Base: All with any TV sets (2,052). *Pre-2014 'About the right amount'. Dashed line to show where survey method changed.

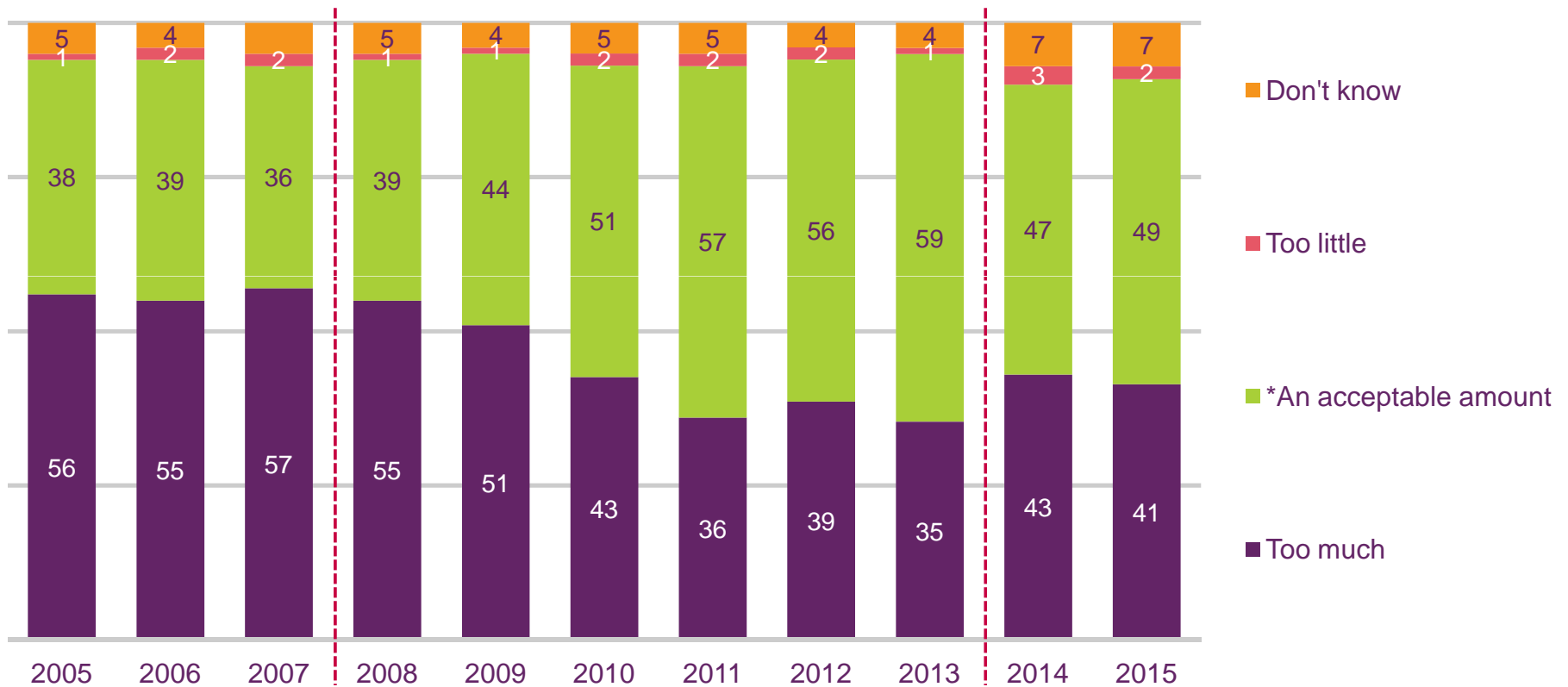
Opinion on the amount of sex on TV: 2015 sub-groups



Q46 - Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television:
a) Sex?

Base: All with any TV sets in 2015 (2,052); aged 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); ABC1 (1,055); C2DE (993); Parents (594); Non parents (1,458).

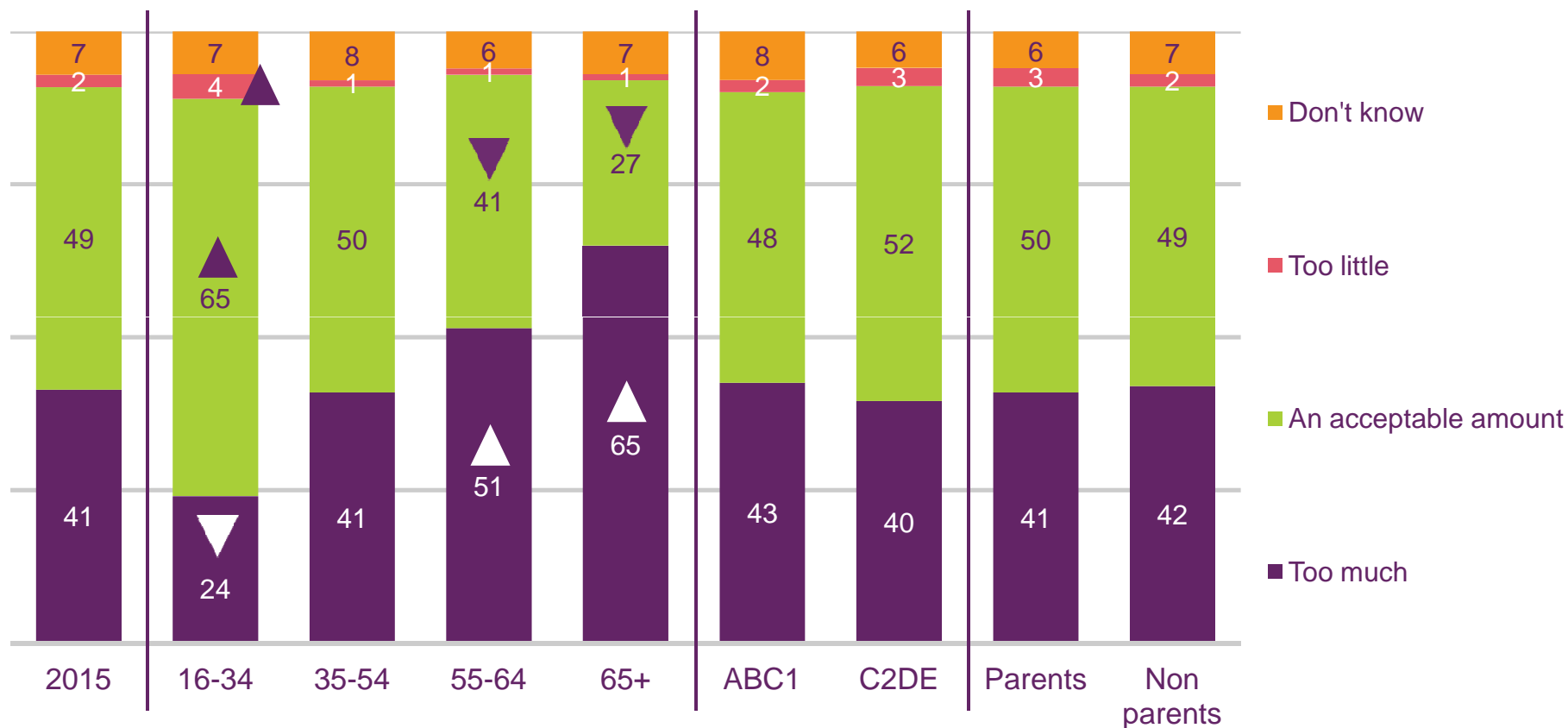
Opinion on the amount of violence on TV: time series



Q46 - Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television:
b) Violence?

Base: All with any TV sets (2,052). *Pre-2014 'About the right amount'. Dashed line to show where survey method changed.

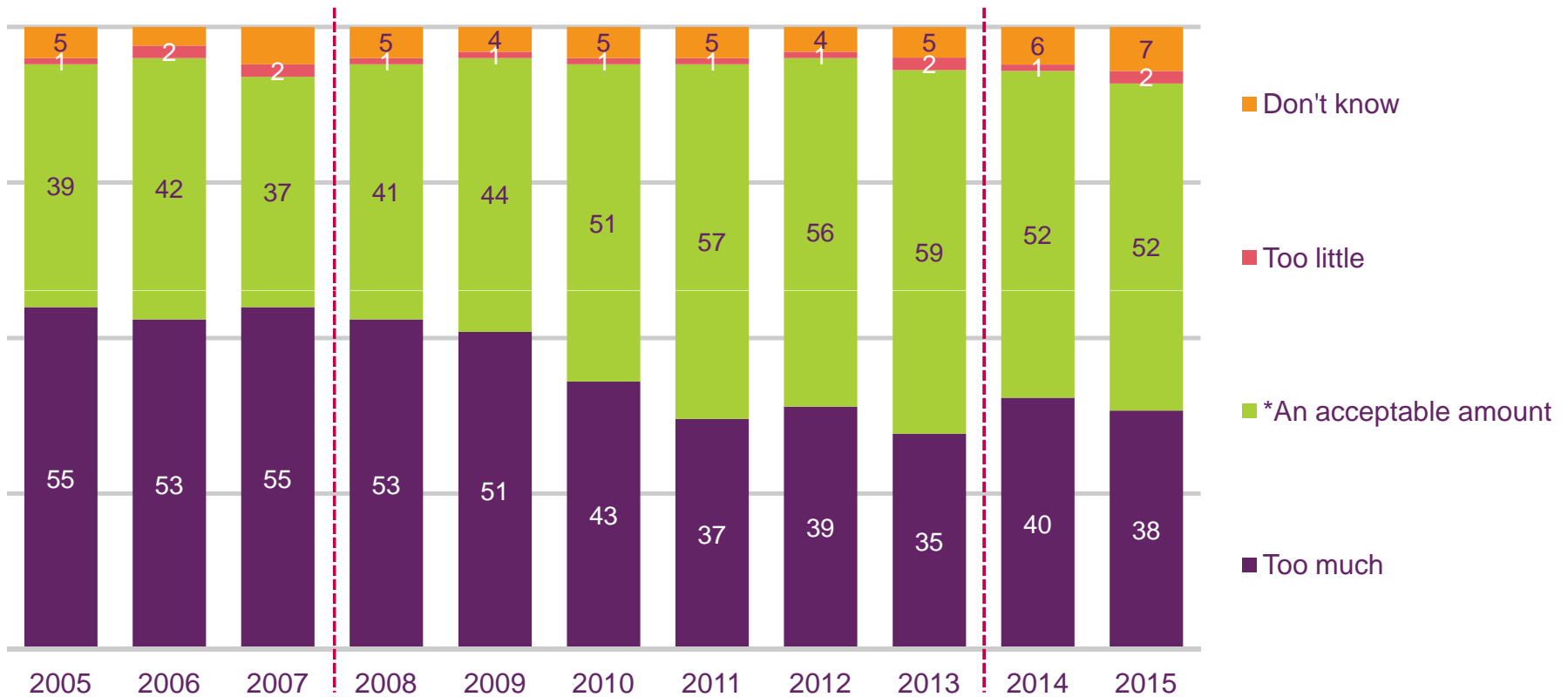
Opinion on the amount of violence on TV: 2015 sub-groups



Q46 - Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television:
 b) Violence?

Base: All with any TV sets in 2015 (2,052); aged 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); ABC1 (1,055); C2DE (993); Parents (594); Non parents (1,458).

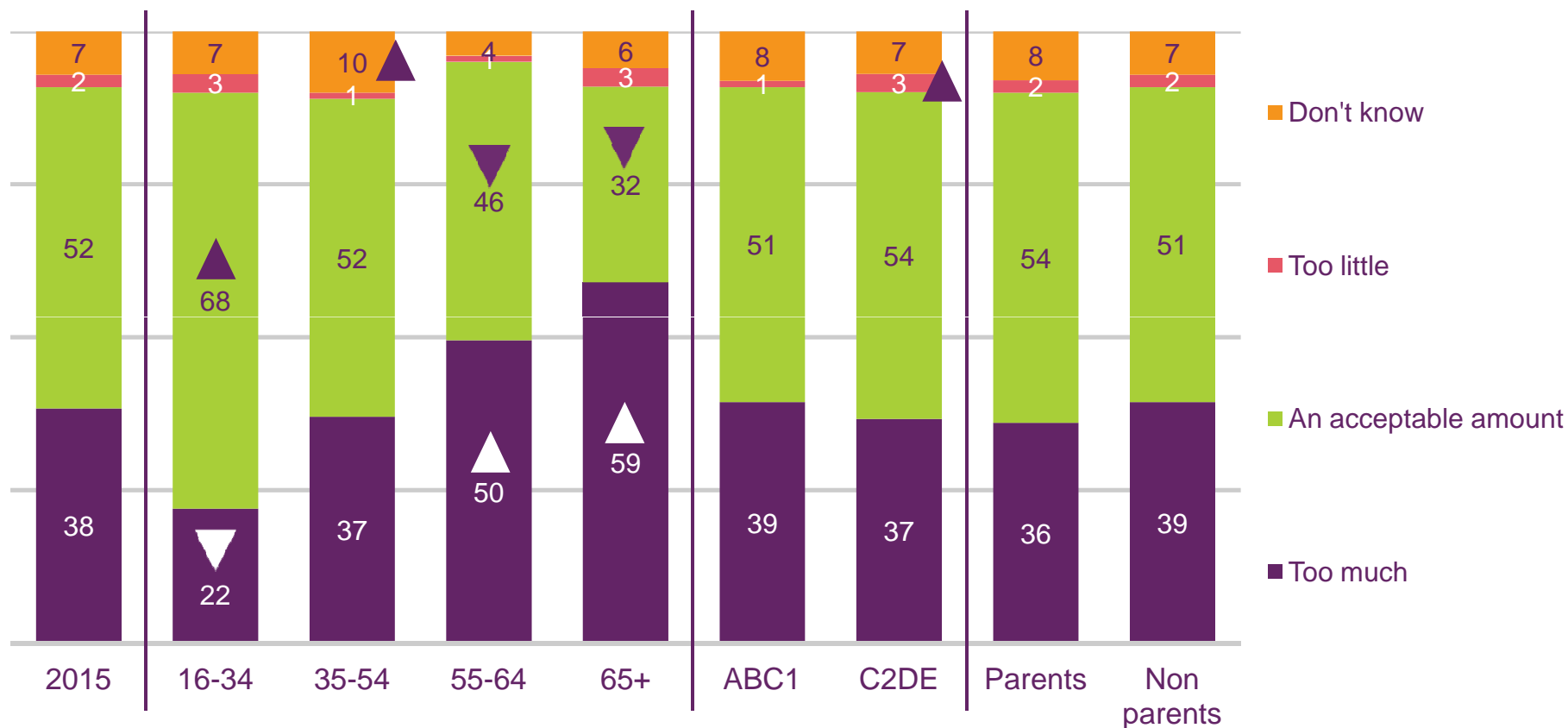
Opinion on amount of swearing on TV: time series



Q46 - Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television:
c) Swearing?

Base: All with any TV sets (2,052). *Pre-2014 'About the right amount'. Dashed line to show where survey method changed.

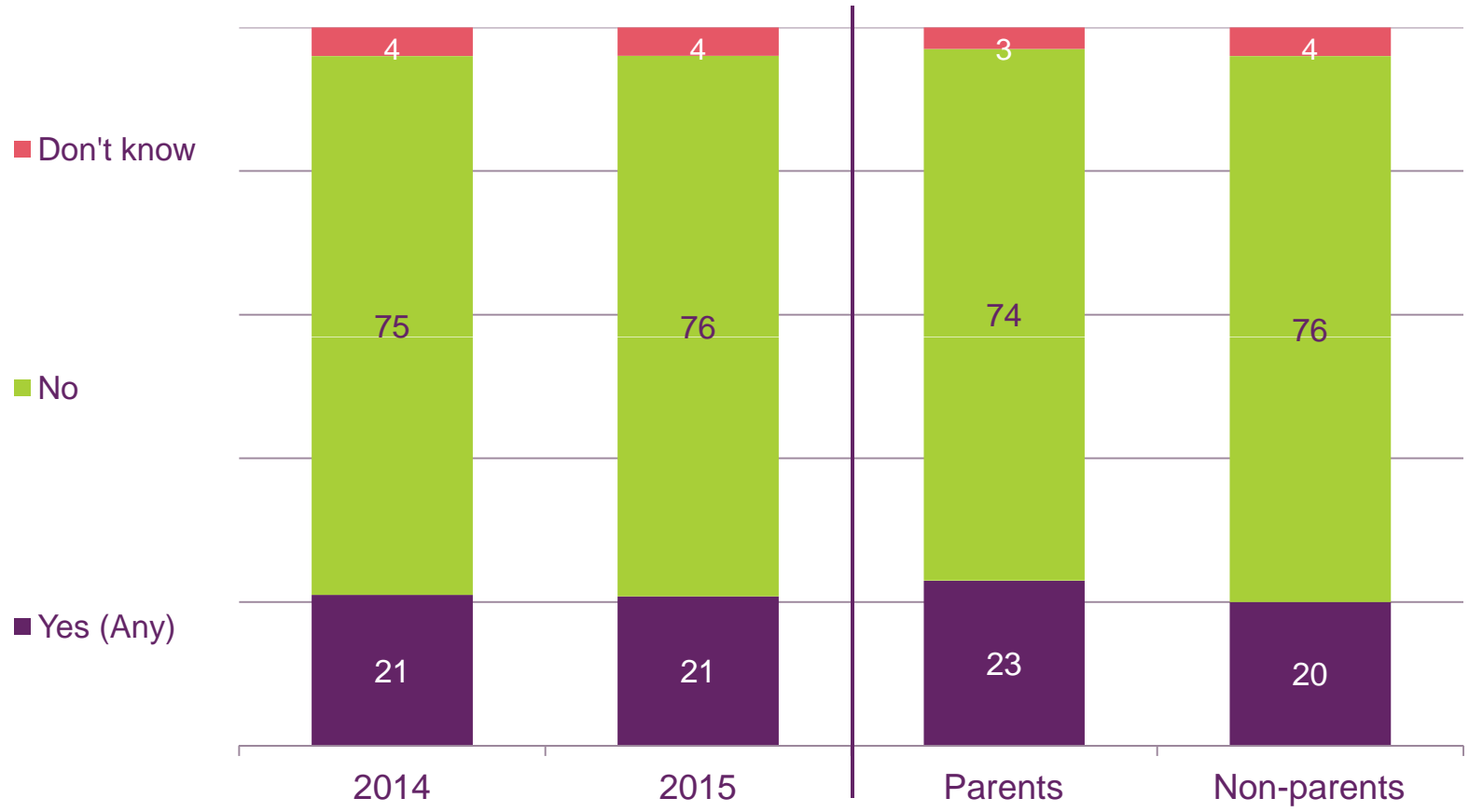
Opinion on the amount of swearing on TV: 2015 sub-groups



Q46 - Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television:
c) Swearing?

Base: All with any TV sets in 2015 (2,052); aged 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); ABC1 (1,055); C2DE (993); Parents (594); Non parents (1,458).

Overall % who have seen something on TV they consider harmful or damaging



Q48 - Have you seen anything on TV in the last 12 months that you thought was harmful or damaging either to yourself, other adults or children?

Base: All with any TV sets in 2014 (2,016); 2015 (2,052) ; Parents (594); Non parents (1,458).

What content on TV was considered to be harmful or damaging

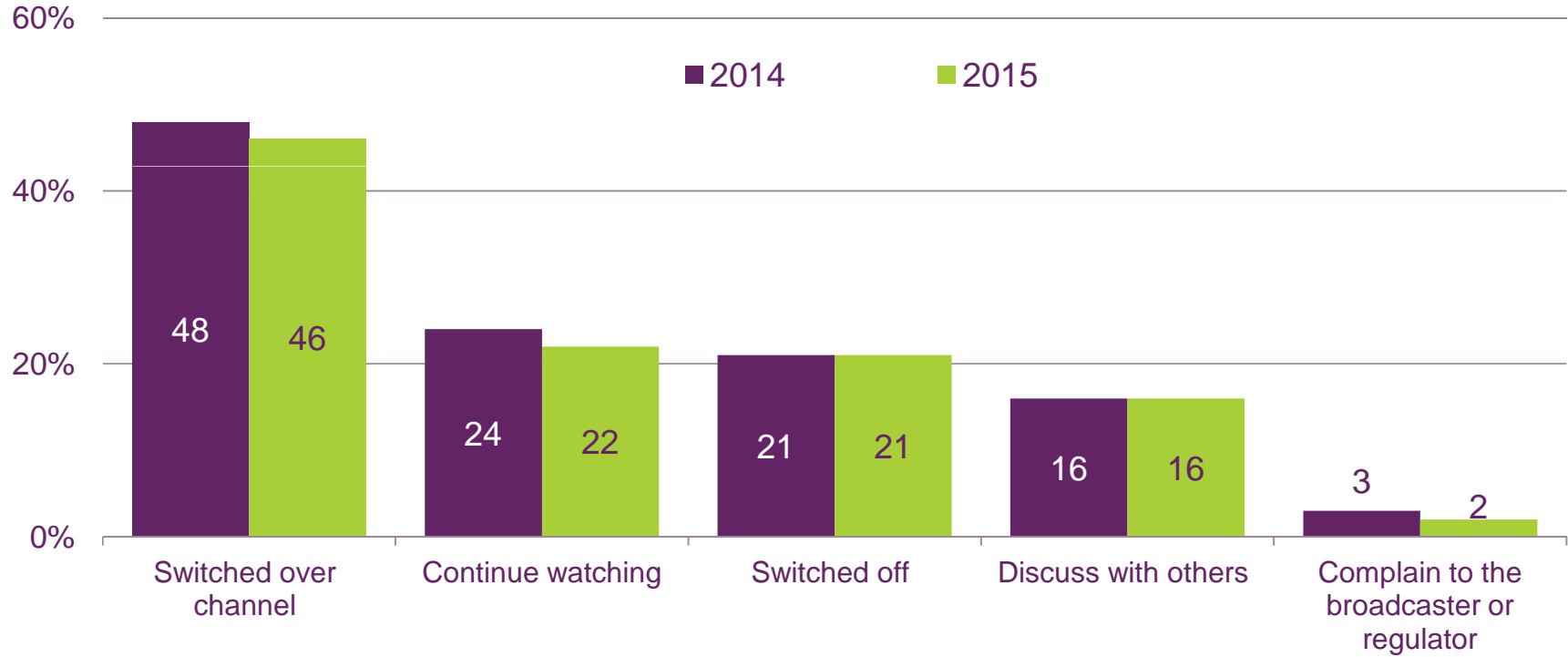


| Q - What was harmful? (Unprompted, Multicode) | All | Parents | Non parents |
|--|-----|---------|-------------|
| Violence | 55% | 56% | 54% |
| Sex/ sexual content | 37% | 46% ▲ | 33% |
| Bad language | 27% | 31% | 25% |
| Antisocial behaviour | 20% | 22% | 19% |
| Bullying | 15% | 20% ▲ | 12% |
| Alcohol/ substance misuse | 8% | 10% | 7% |
| Portrayal of self harm | 6% | 7% | 6% |
| Financial advice/ recommendation | 6% | 7% | 5% |
| Portrayal of suicide | 6% | 5% | 6% |

Q49 – Can you please tell me what you saw that you thought was harmful or damaging?

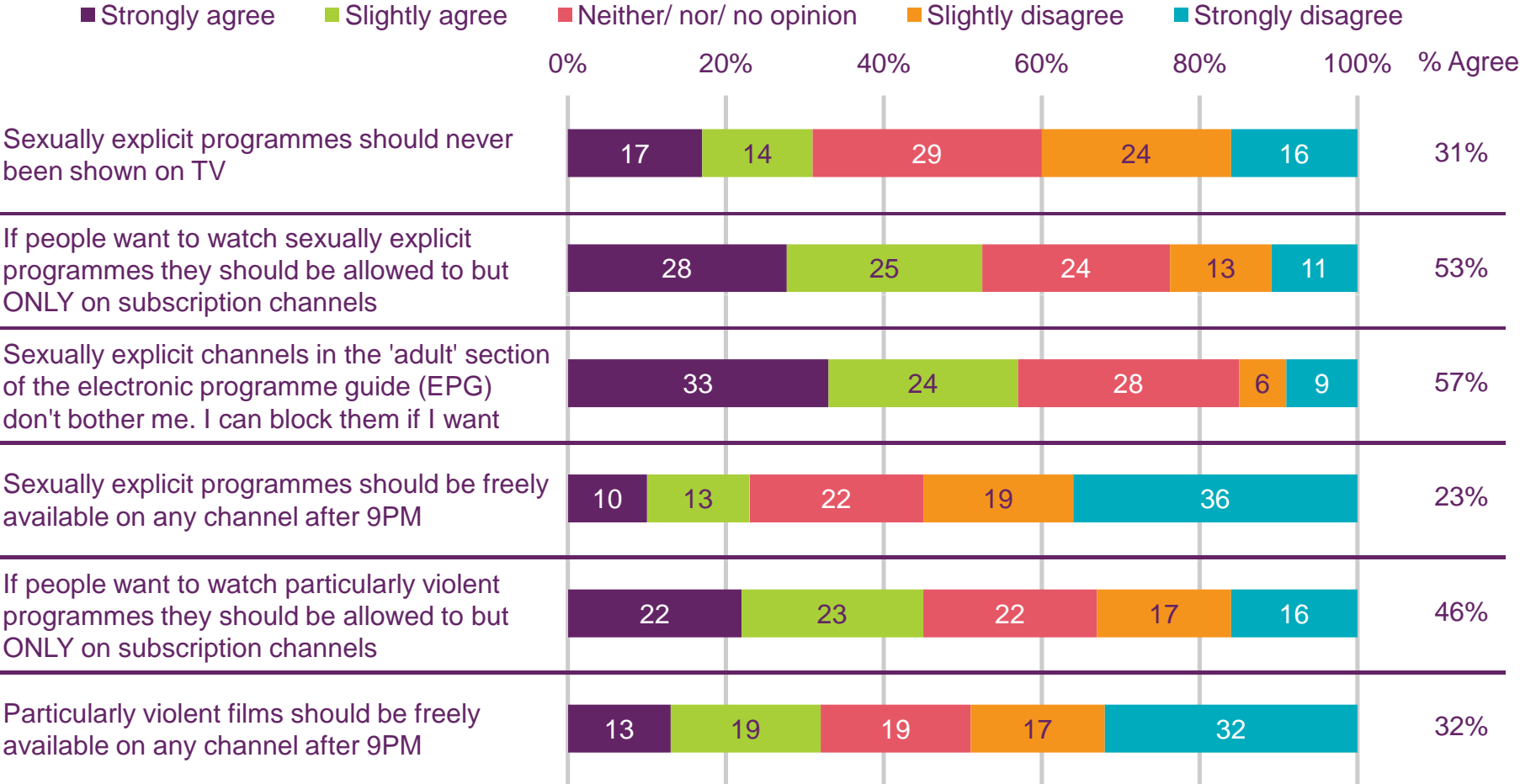
Base: All who have seen something harmful or damaging in 2015 (429); Parents (135); Non parents (294).

Reaction to harmful or damaging content on TV: 2014 vs 2015



Q51 - How did you react when you saw something you thought was harmful or damaging? In other words what did you do?
Base: All who said they'd seen something harmful or damaging on TV in last 12 months in 2014 (399); 2015 (429).

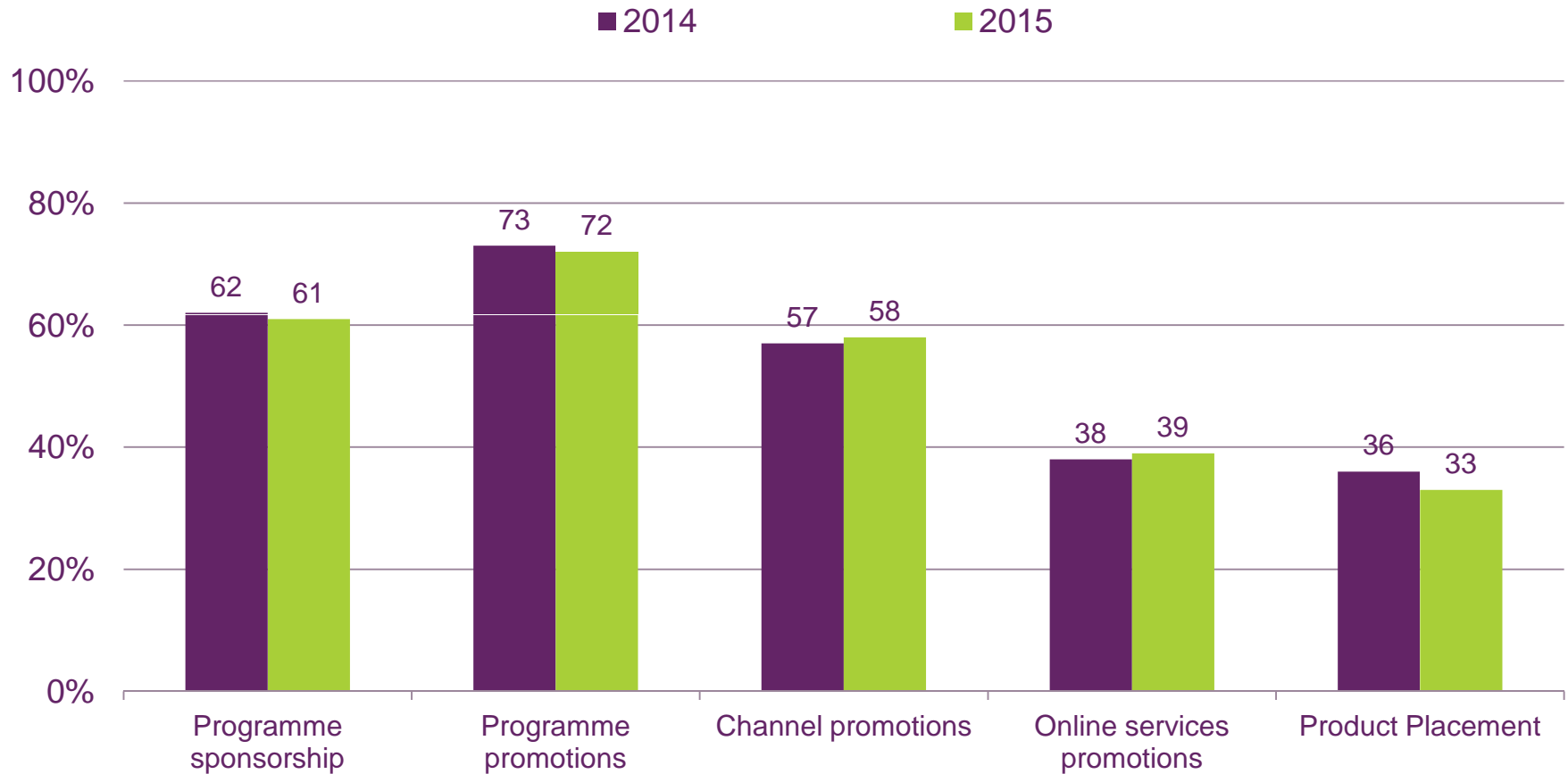
Agreement with statements relating to potentially offensive material on TV



Q47 - I am going to read out some statements and I would like you to tell me how much you agree or disagree with them.
 Base: All with any TV sets in 2015 (2,052)

Attitudes towards advertising and other commercial activity

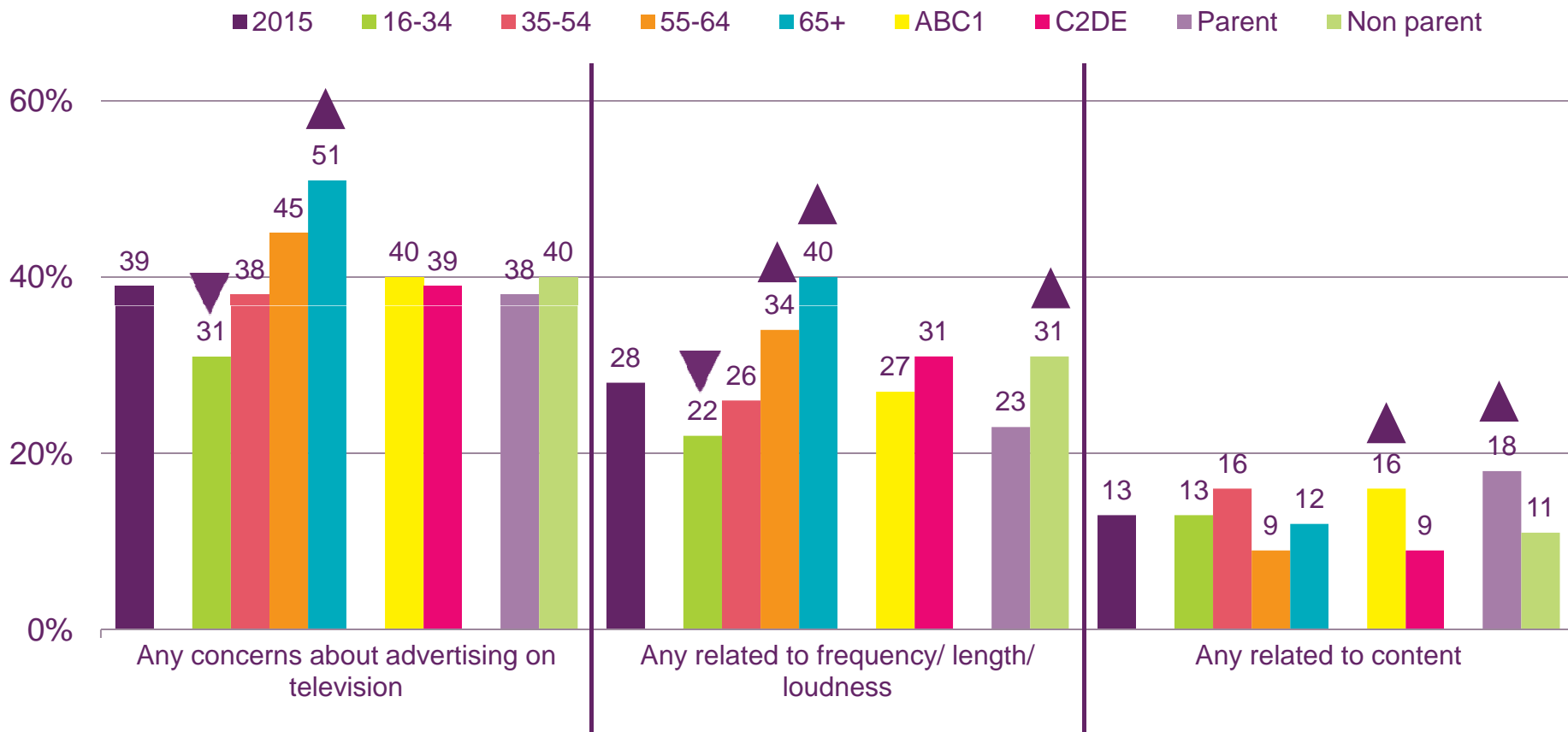
Awareness of commercial messages on television



Q24 - Which of the following, if any, are you aware of on television?

Base: All with any TV sets in 2014 (2,016); 2015 (2,052).

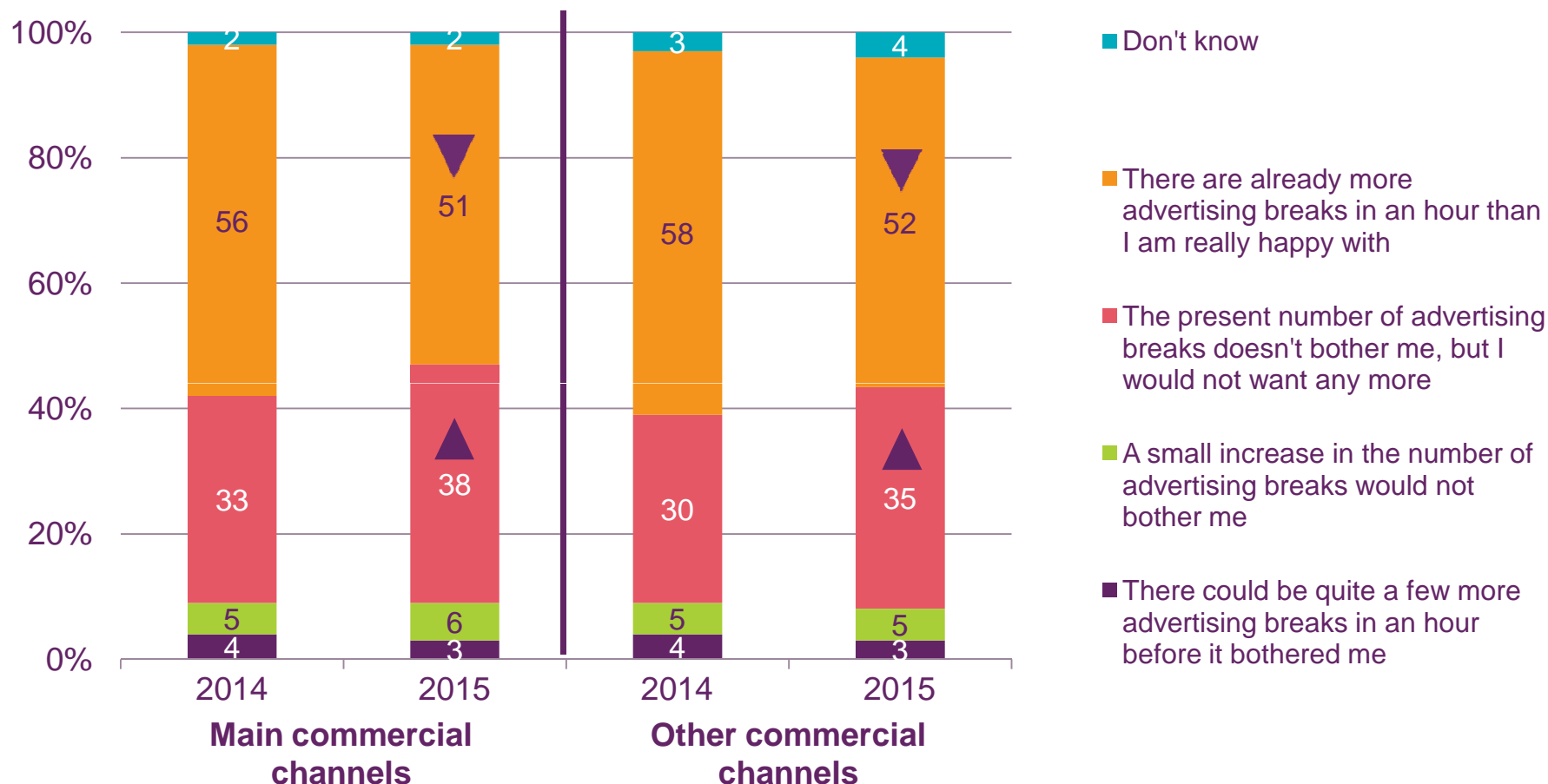
Concerns about advertising on TV



Q25 - Do you have any concerns about advertising on television? IF YES - What do you have concerns about?

Base: All with any TV sets in 2015 (2,052); 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); ABC1 (1,055); C2DE (993); Parent (594); Non parent (1,458).

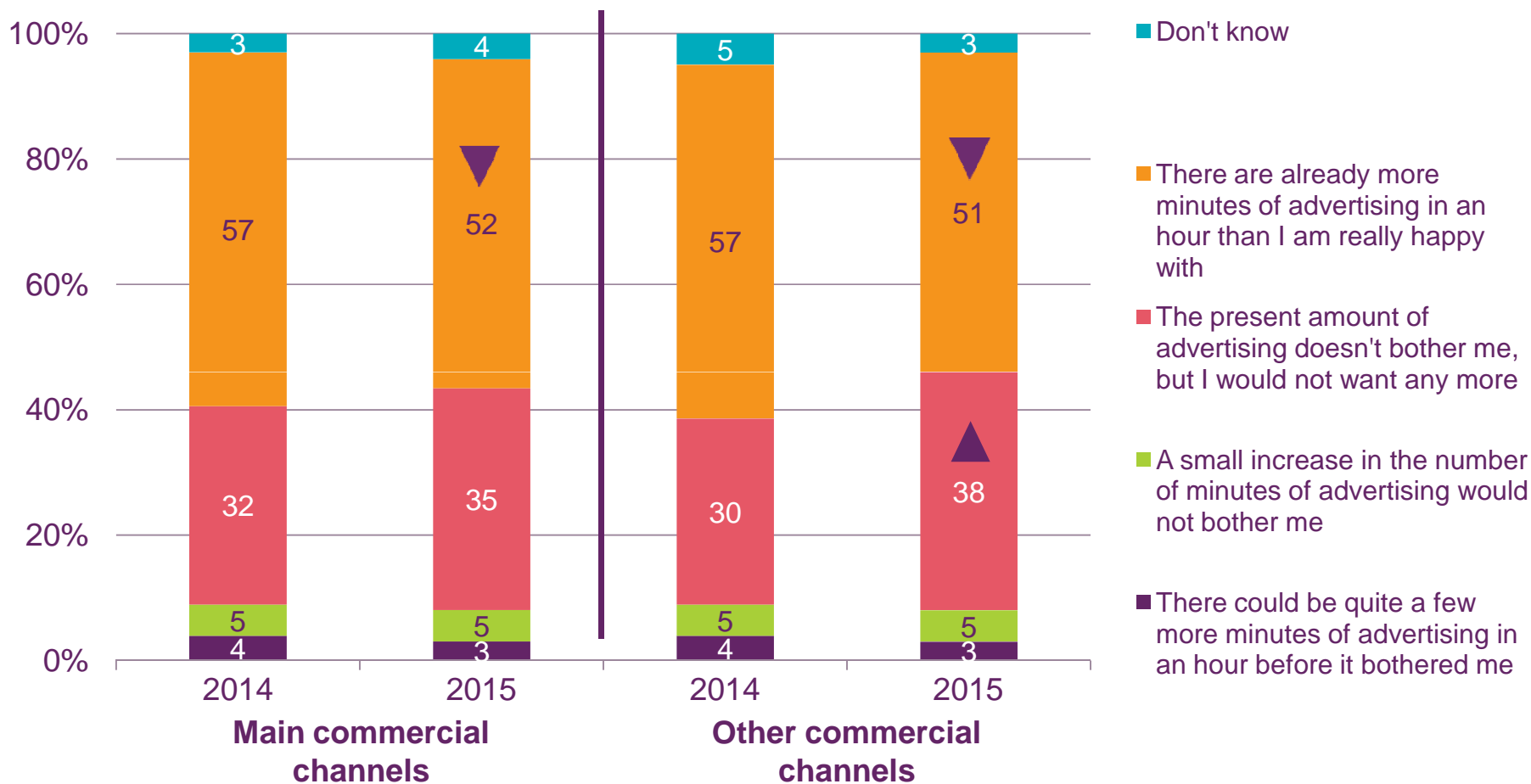
Opinion on frequency of TV advertising breaks: 2014 vs 2015



Q26/27 Which of these best describes how you feel about the frequency of advertising breaks on the main commercial free-to-air channels – that is ITV1, Channel 4 and Channel 5?/on the other commercial channels. So, for example, ITV2, More4, Sky 1, The Discovery Channel, MTV.

Base: All with any TV sets in 2014 (2,016); 2015 (2,052).

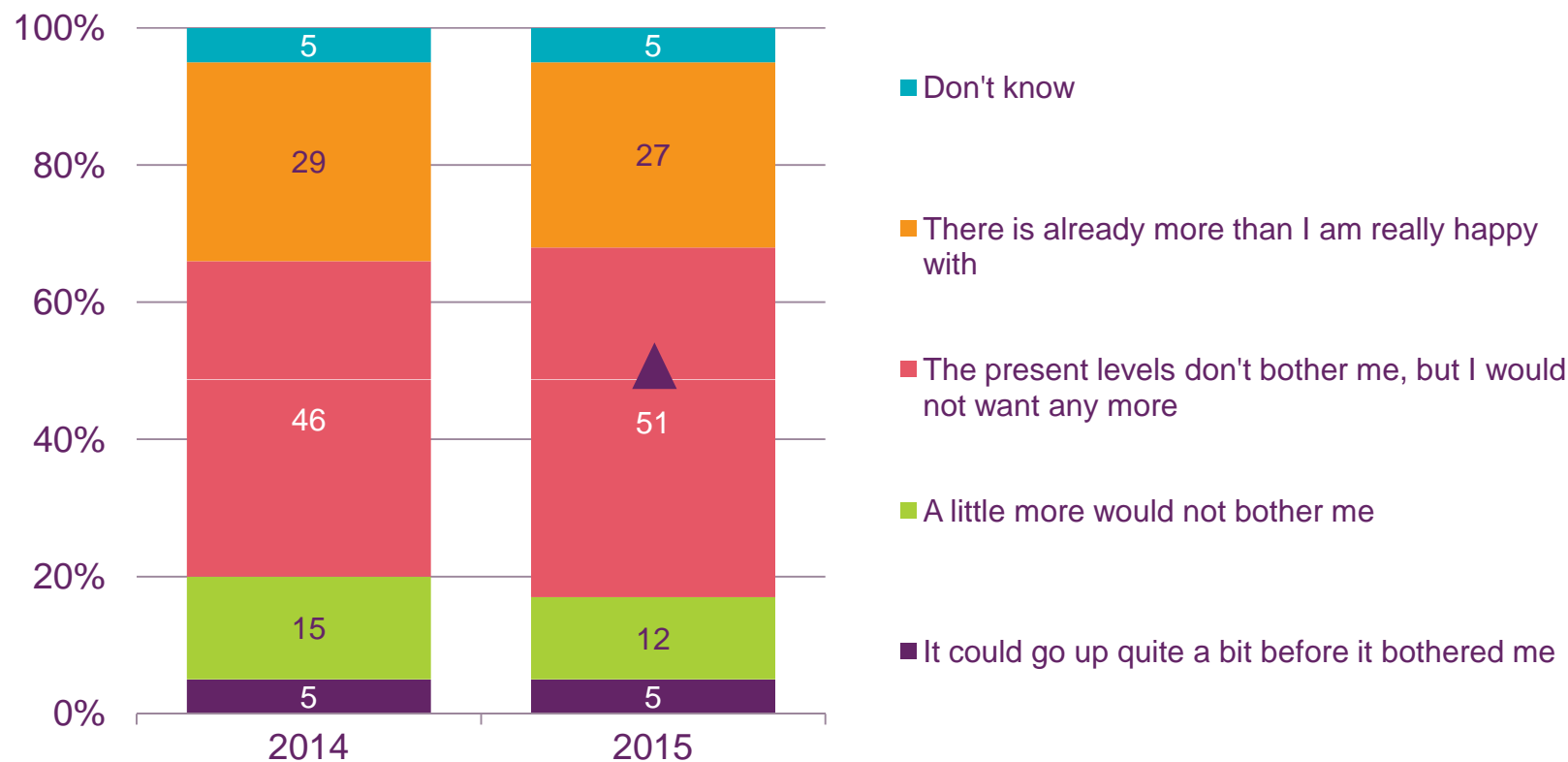
Opinion on amount of TV advertising minutage: 2014 vs 2015



Q28/29 – Which of these statements best describes how you feel about the total number of minutes of advertising within an hour of programmes on the main commercial free-to-air channels/other commercial channels – all the other channels with adverts except for ITV1, Channel 4 and Channel 5.

Base: All with any TV sets in 2014 (2,016); 2015 (2,052).

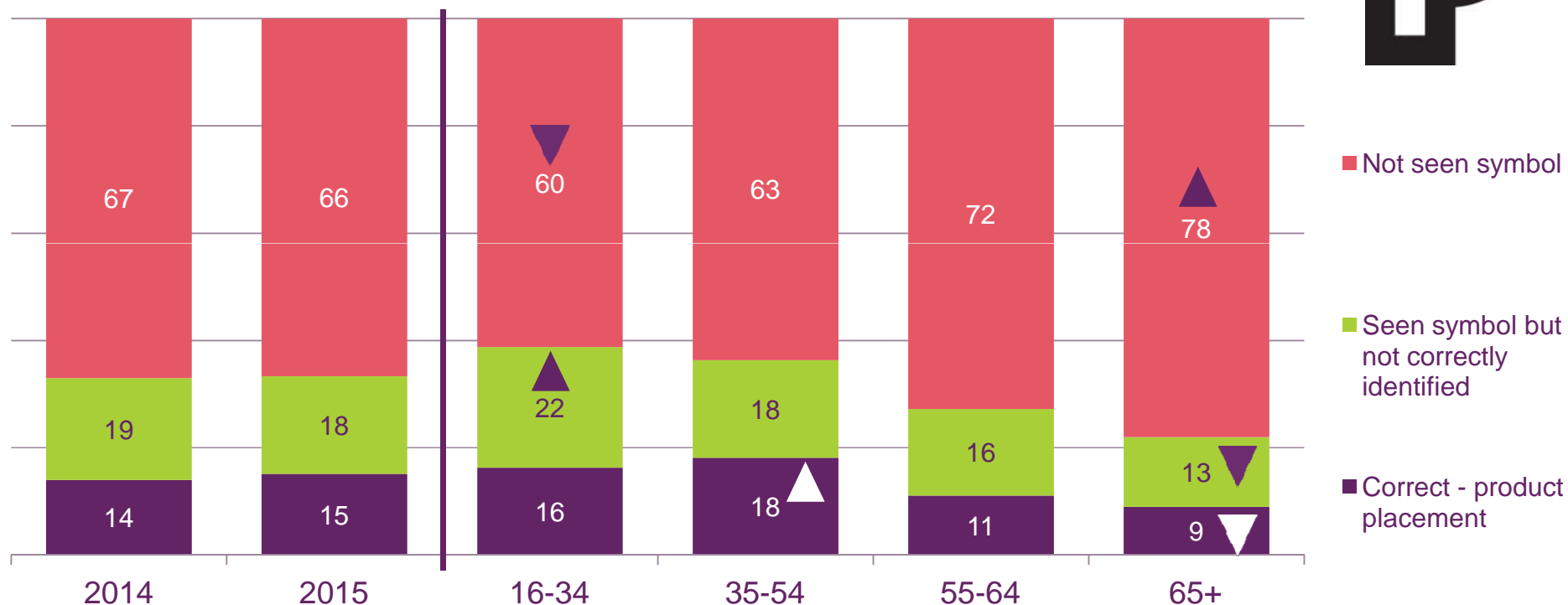
Opinion on amount of commercial activity on radio



Q57: Advertising and sponsorship provide income for commercial radio stations. Without income from advertising and sponsorship, commercial radio stations may not exist. With this in mind, which of these statements best describes how you feel about the amount of advertising and programme sponsorship on commercial radio stations?

Base: All who listen to Commercial radio stations in 2014 (752); 2015 (1,165).

Awareness of product placement symbol

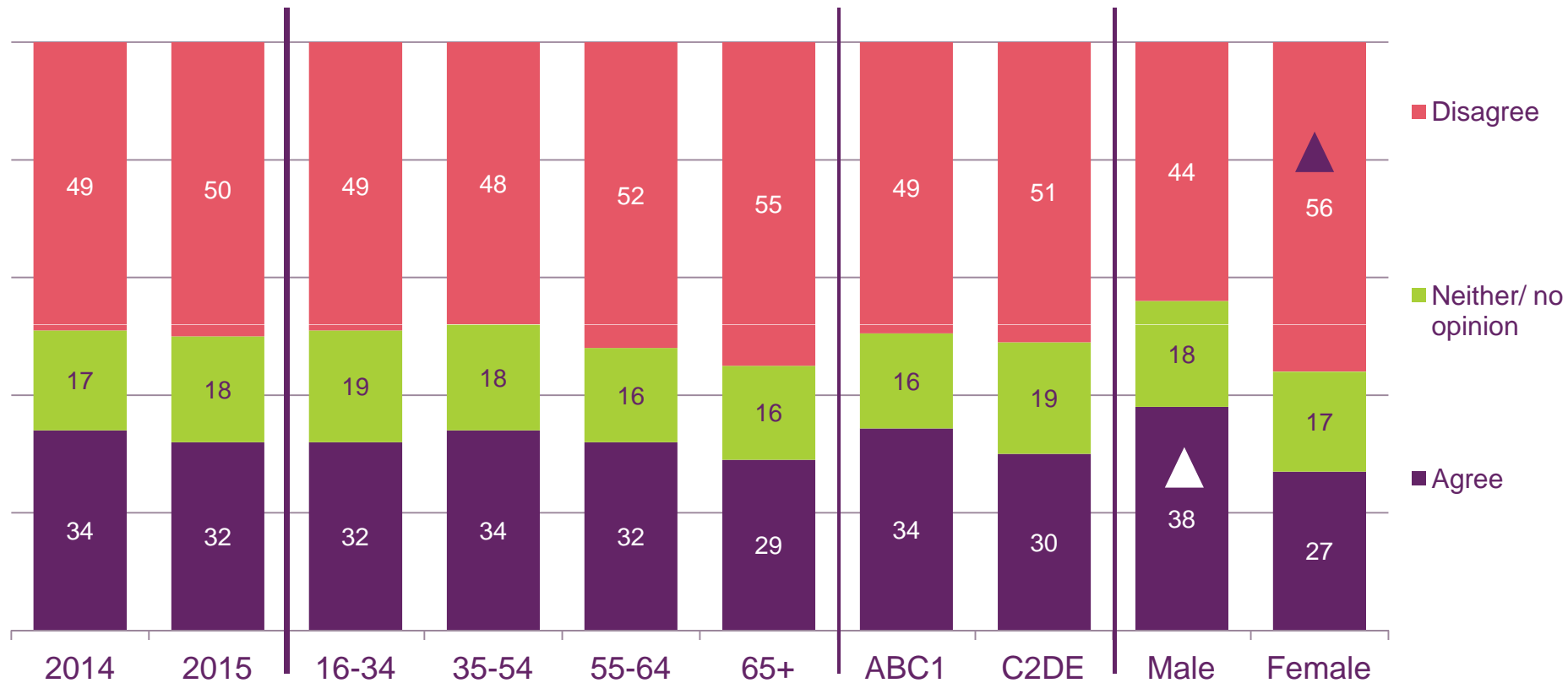


Q23 – Have you ever noticed this symbol featured at the beginning or end of a TV programme, or following an advertising break?
 IF YES - Do you know what this symbol is used for?

Base: All with any TV sets in 2014 (2,016); 2015 (2,052); 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462).

Attitudes towards privacy/ intrusion

Level of agreement with statement relating to TV programmes and lives of public figures



Q69A - TV broadcasters should be free to show programmes that scrutinise the lives of celebrities, politicians or other public figures without them giving consent

Base: All in 2015 (2,107); 16-34 (620); 35-54 (675); 55-64 (344); 65+ (468); ABC1 (1,090); C2DE (1,013); Male (997); Female (1,110).

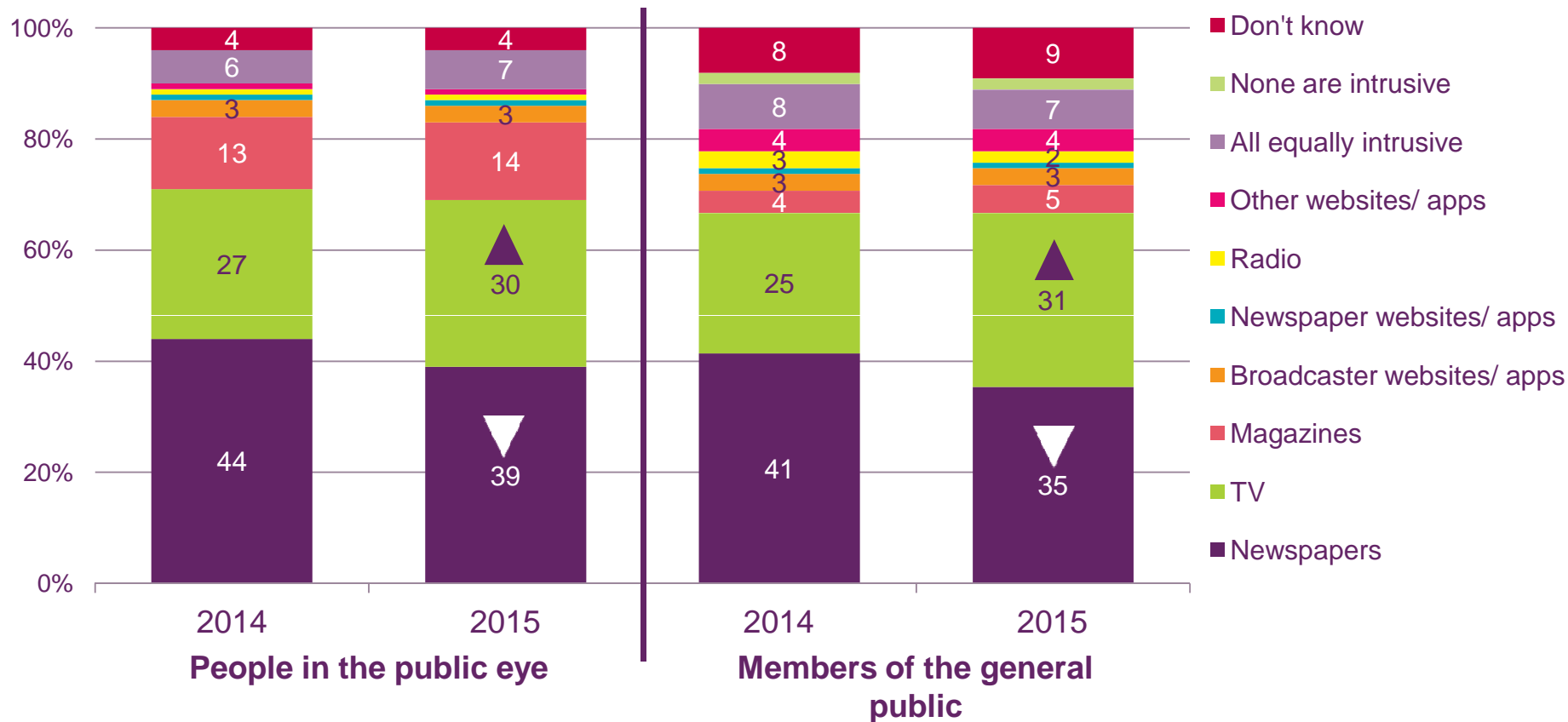
Level of agreement with statements relating to TV programmes and lives of the general public



Q69B - TV broadcasters should be free to show programmes that scrutinise the lives of general members of the public without them giving consent

Base: All in 2015 (2,107); 16-34 (620); 35-54 (675); 55-64 (344); 65+ (468); ABC1 (1,090); C2DE (1,013); Male (997); Female (1,110).

Most intrusive media into lives of people in the public eye/ members of the general public



Q70 - Thinking specifically about people in the public eye - that is celebrities, politicians and other public figures rather than the general public - which one, if any, of these sources do you feel is the most intrusive into the lives of these people?

Q73 - Now thinking specifically about members of the general public, which one, if any, of these sources do you feel is the most intrusive into the lives of members of the public?

Base: All respondents in 2014 (2,074); 2015 (2,107).

Summary – Audience attitudes towards programme standards (1)



- As in 2014, adults with any TV sets are more likely to feel that TV programmes have got worse (30%) than improved (17%) in the last 12 months, but half (50%) feel they have stayed about the same
- Older (65+) and C2DE adults are more likely to feel programmes have got worse (mostly due to 'more repeats')
- Younger (16-34) and ABC1 adults are more likely to feel programmes have improved (mostly due to 'improved quality', 'wider range of programmes')
- One in five (19%) with any TV sets have found anything on TV to be offensive in the last 12 months, as in 2014
- Higher incidence of offence among older (65+), ABC1 adults, and females
- Equally likely for offensive content to be sexual (34%), violent (37%) or bad language (38%)
- Half (50%) say they reacted by switching channel and very few (2%) complained
- No consensus in terms of attitudes towards the offensive material – a similar proportion say it should not have been shown as accept others should be allowed to see it

Summary – Audience attitudes towards programme standards (2)



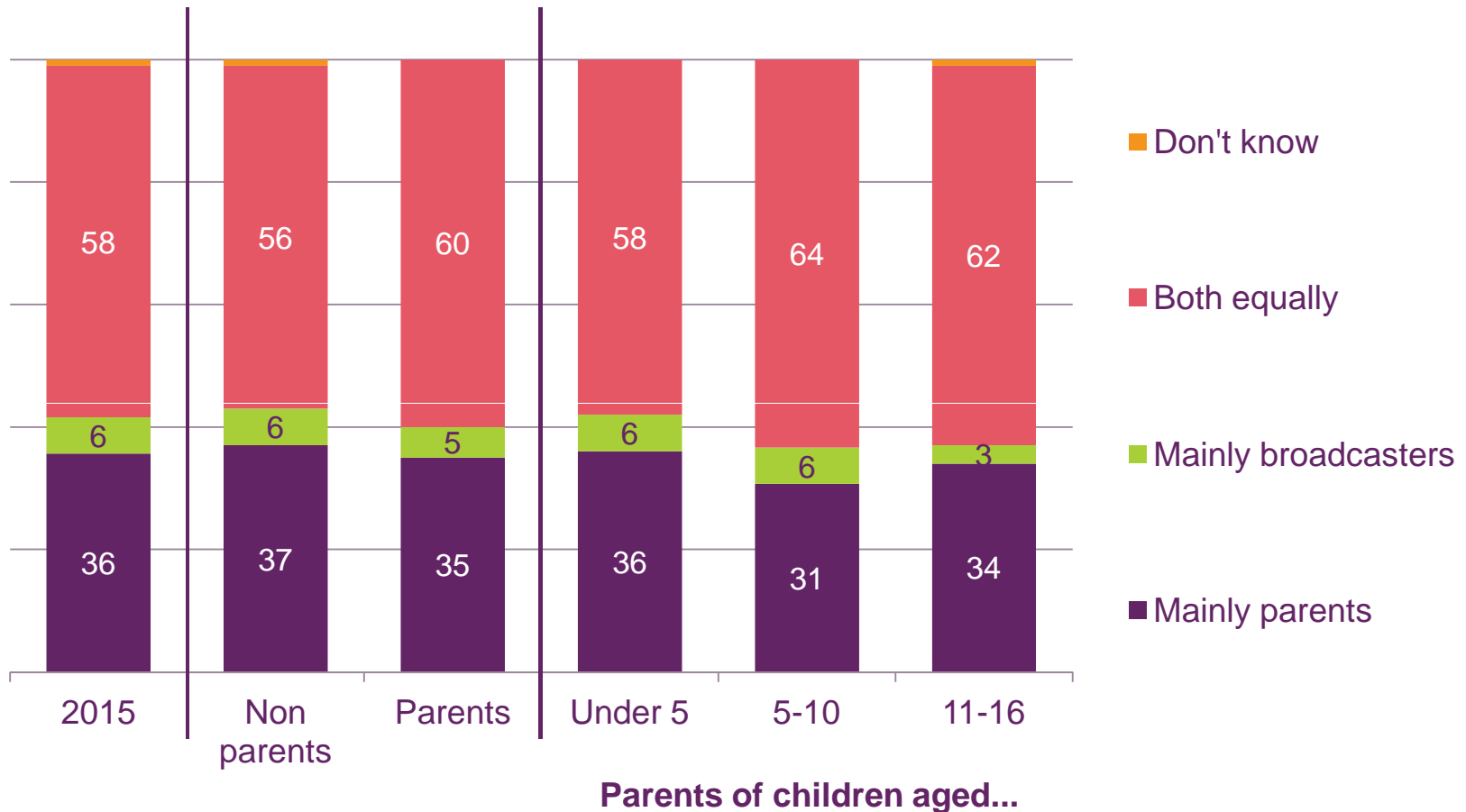
- Among radio listeners, 2% have heard anything on the radio they found offensive in the last 12 months, as in 2014 (versus 19% for TV)
- Four in ten with any TV sets think there is 'too much' violence (41%) or swearing (38%) on television, while one quarter (25%) think there is 'too much' sex
- A decline since 2014 in thinking there is 'too much' sex on TV (25% vs. 28%)
- Adults aged 55+ are more likely to feel there is 'too much' of each type of content on TV and 16-34s are less likely. Less variation in opinions by socio-economic group and family status.
- One in five (21%) with any TV sets say they have seen anything on TV in the last 12 months they thought was harmful or damaging, as in 2014
- Over half (55%) seeing harmful content say this was violence, four in ten (37%) say sexual content and three in ten (27%) say bad language
- Around half (46%) say they reacted by switching channel and very few (2%) complained
- A minority with any TV sets say that sexually explicit or particularly violent programmes or films should be freely available on any channel after 9pm

- No change since 2014 in awareness of commercial messages: with most viewers aware of programme and channel promotions and programme sponsorship and a minority aware of online services promotions and product placement
- Four in ten (39%) viewers say they have any concerns about advertising on television, with these most likely to relate to frequency/ length of breaks (28%)
- Since 2014, viewers are less likely to say that there are already more frequent and longer advertising breaks in an hour than they are happy with – but half of viewers are still of this opinion
- Since 2014, radio listeners are more likely to say that the present levels of radio advertising and sponsorship 'don't bother me' but they would not want any more (51% vs. 46%)
- Two-thirds (66%) of adults viewers say they have not seen the 'P' (product placement) symbol and one in seven (15%) could correctly say what the symbol is used for, as in 2014

- While one-third (32%) of adults agree that TV broadcasters should be free to show programmes about public figures without giving them consent, half (50%) disagree with this, as in 2014 and with very little variation by sub-group
- One in five (20%) agree that TV broadcasters should be free to show programmes about members of the public without giving them consent, and two-thirds (64%) disagree with this, also as in 2014 and with very little variation by sub-group
- Newspapers remain the medium most likely to be named as the most intrusive media, but this is less likely since 2014 for both people in the public eye (39% vs. 44%) and members of the public (35% vs. 41%)
- TV sees an increase since 2014 in being named as the most intrusive media for both people in the public eye (30% vs. 27%) and members of the public (31% vs. 25%)

- Audience attitudes towards programme standards [12:30 – 13:25]
 - Audience attitudes to programme standards
 - Attitudes towards advertising
 - Attitudes towards privacy/ intrusion
- Protection of children, the watershed and attitudes towards regulation [13:30-13:55]
 - Protection of children and the watershed
 - Attitudes towards regulation

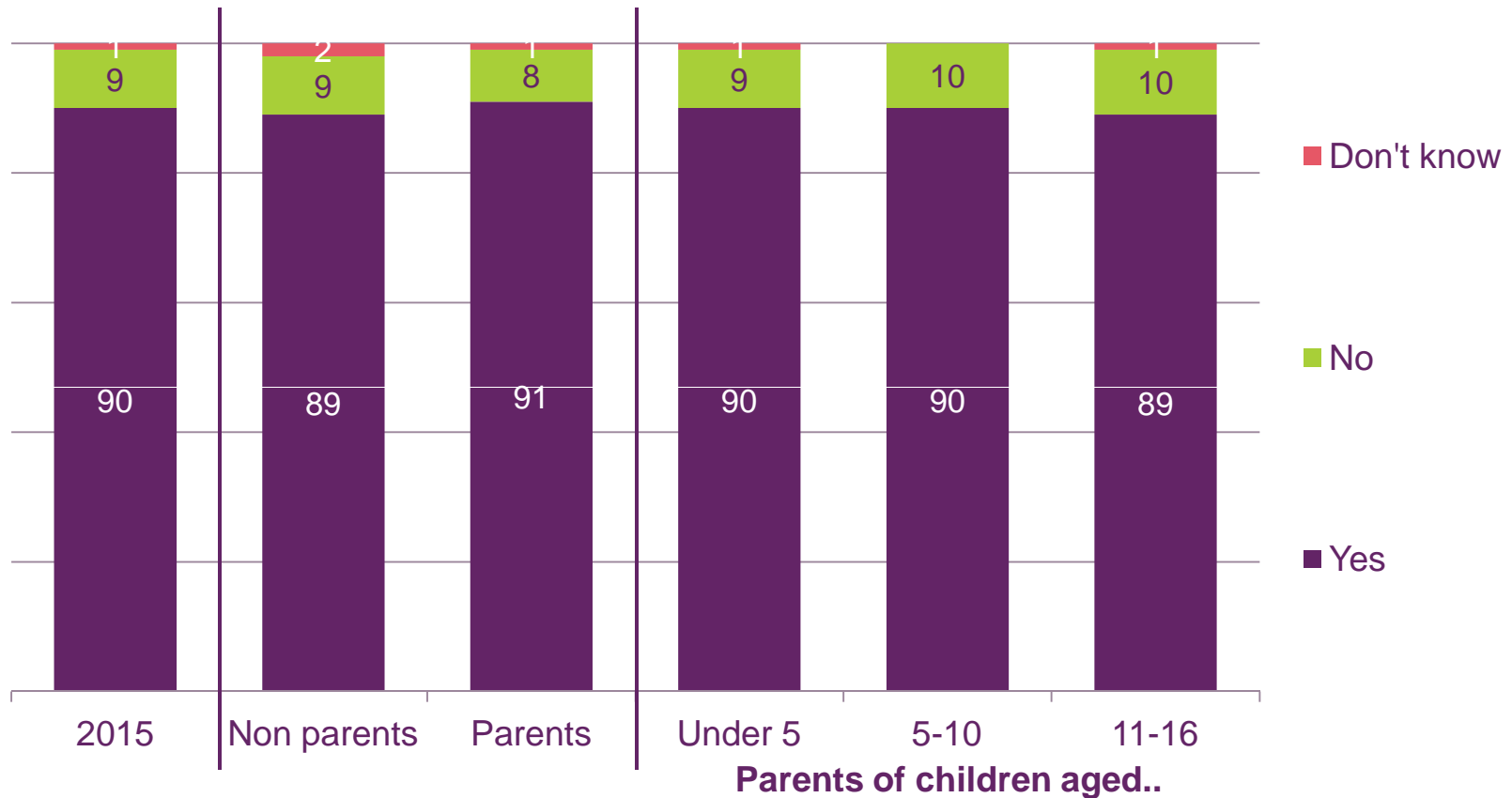
Opinion on whose responsibility it is to ensure children do not see unsuitable programming



Q37 - Do you think it is mainly the responsibility of parents, broadcasters or both equally, to make sure that children don't see unsuitable programmes?

Base: All with any TV sets in 2015 (2,052); Non-parents (1,458); Parents (594); Parents of children aged... Under 5 (297); 5-10 (360); 11-16 (278).

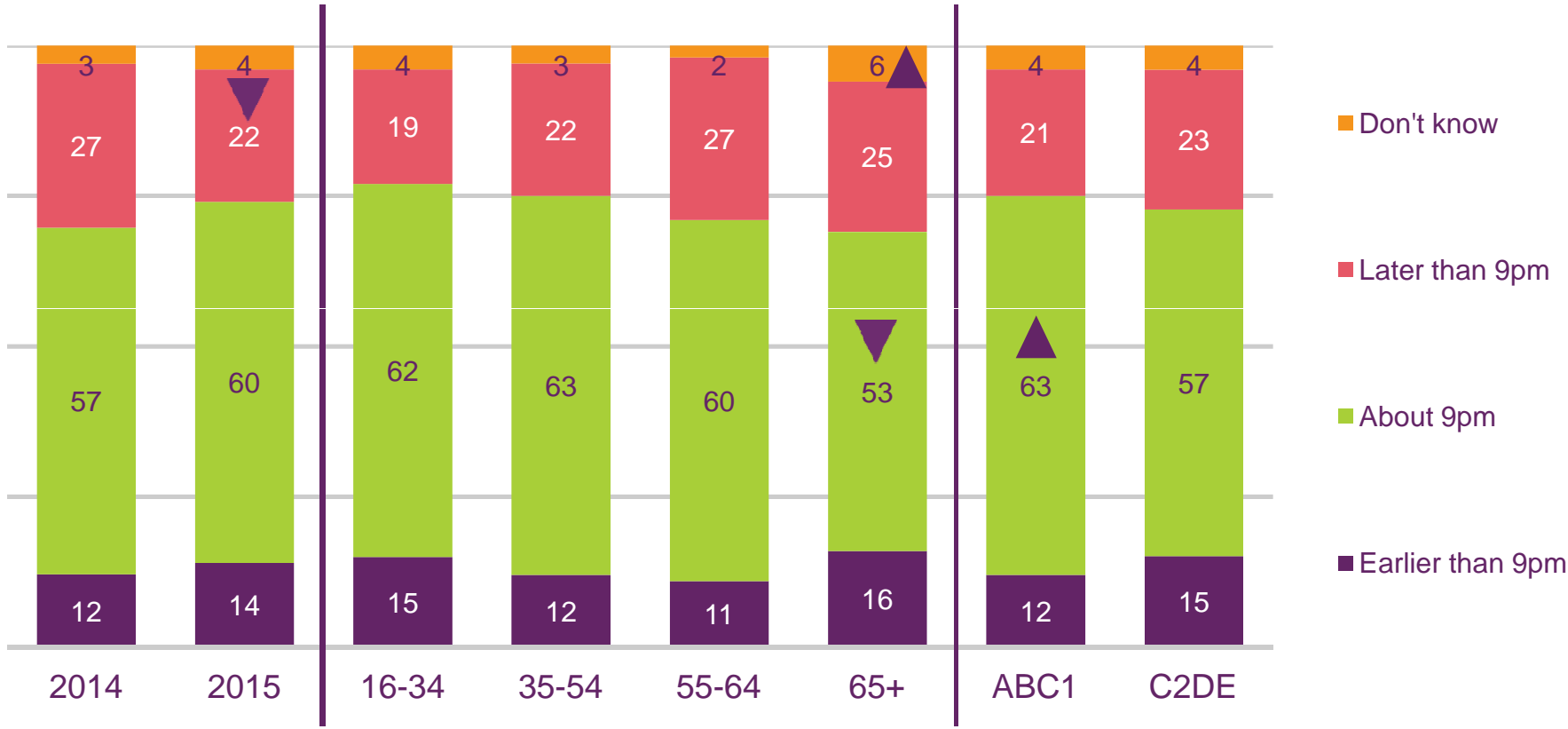
Awareness of the watershed



Intro to question: Broadcasters are required to only show television programmes which are not suitable for children after a certain time in the evening. Q38 - Before today, were you aware of this?

Base: All with any TV sets in 2015 (2,052); Non parents (1,458); Parents (594); Parents of children aged... Under 5 (297); 5-10 (360); 11-16 (278).

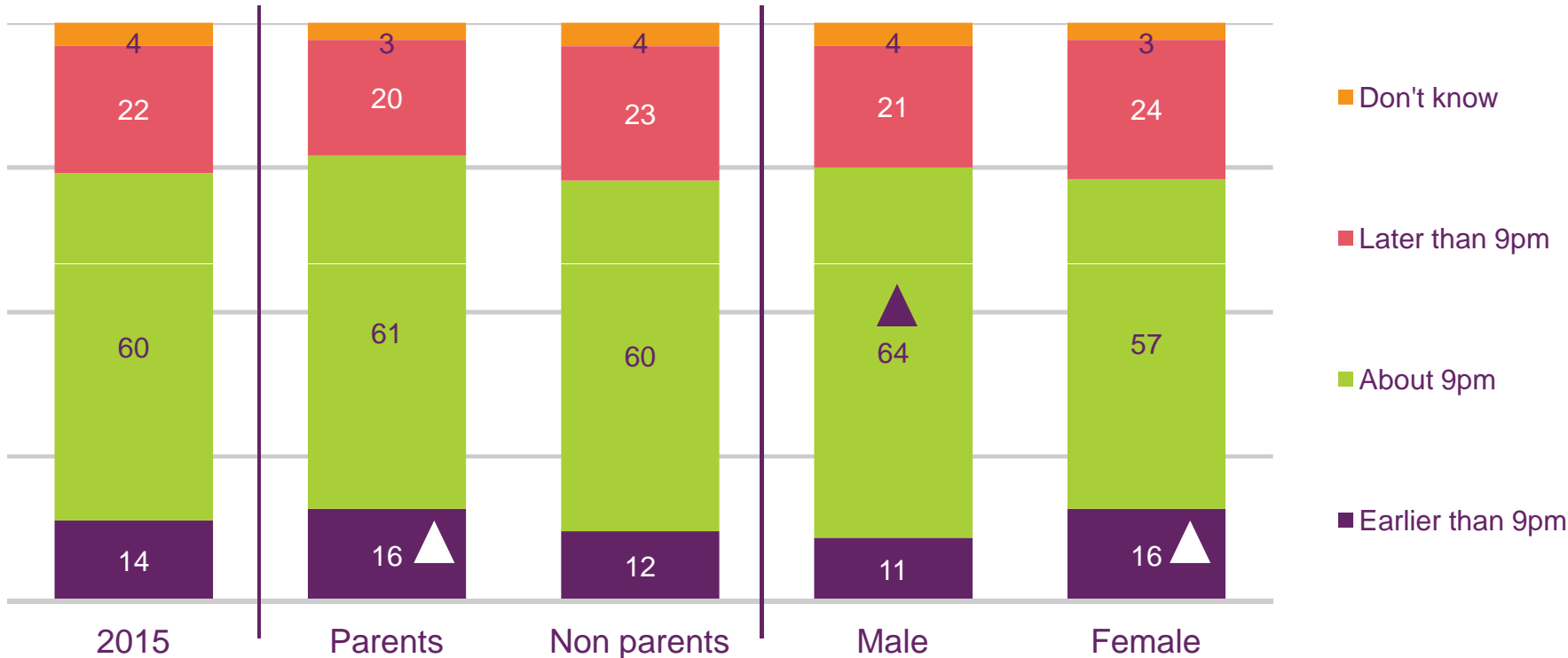
Opinion on time of watershed



Q40 - Programmes that are not suitable for children may be shown on TV channels after 9pm - usually known as the 9 o'clock watershed. Which of these best describes when TV channels should be allowed to broadcast programmes that may not be suitable for children?

Base: All with any TV sets in 2014 (2,016); 2015 (2,052); 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); ABC1 (1,055); C2DE (993).

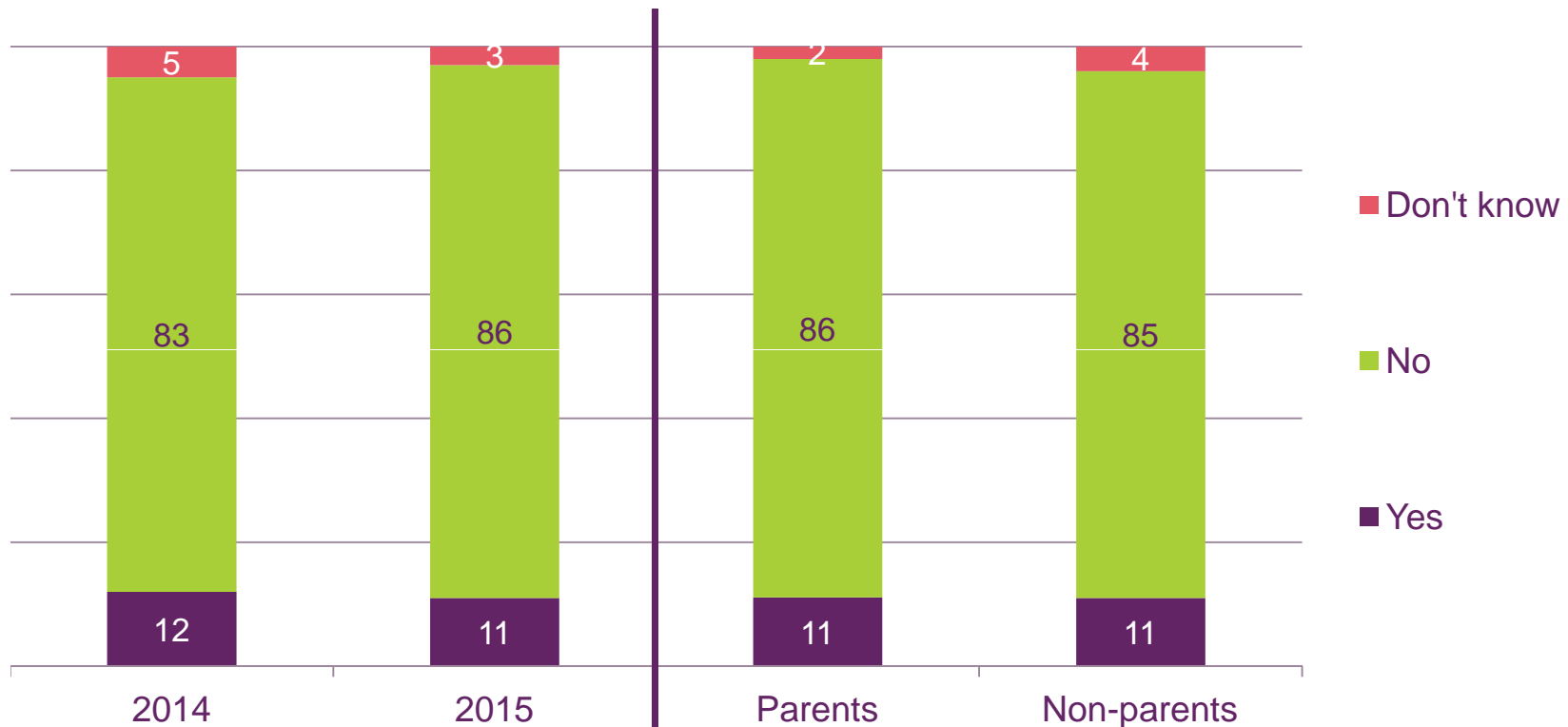
Opinion on time of watershed



Q40 - Programmes that are not suitable for children may be shown on TV channels after 9pm - usually known as the 9 o'clock watershed. Which of these best describes when TV channels should be allowed to broadcast programmes that may not be suitable for children?

Base: All with any TV sets in 2015 (2,052); Parents (594); Non parents (1,458); Male (966); Female (1,086).

% who have felt concerned for the welfare of children taking part in TV programmes in the last 12 months



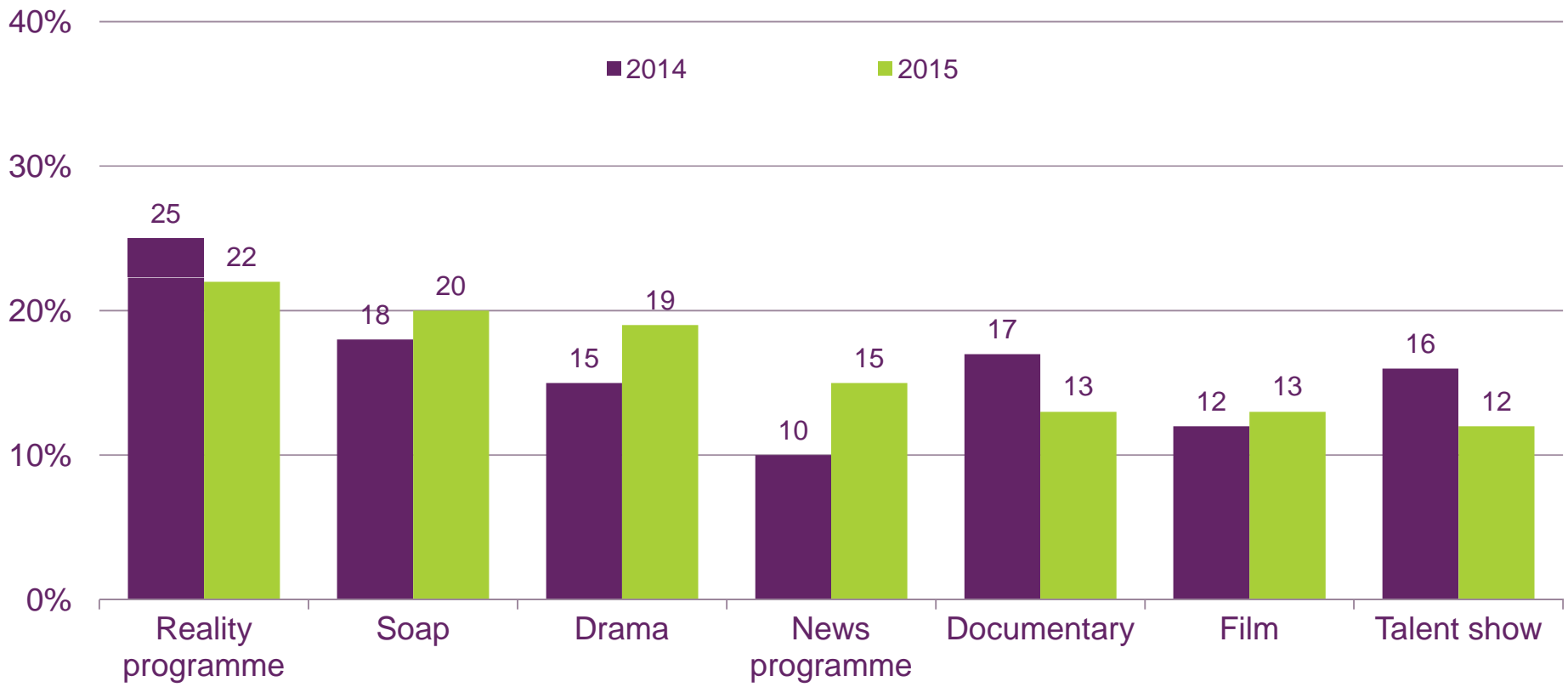
Intro to question:

As you may know, there are guidelines to protect the welfare of children and young people under 18 when they take part in programmes on television.

Q52 - In the last 12 months, have you seen anything on television where you were concerned about the welfare of children or young people taking part in the programme?

Base: All with any TV sets in 2014 (2,016); 2015 (2,052); Parents (594); Non parents (1,458).

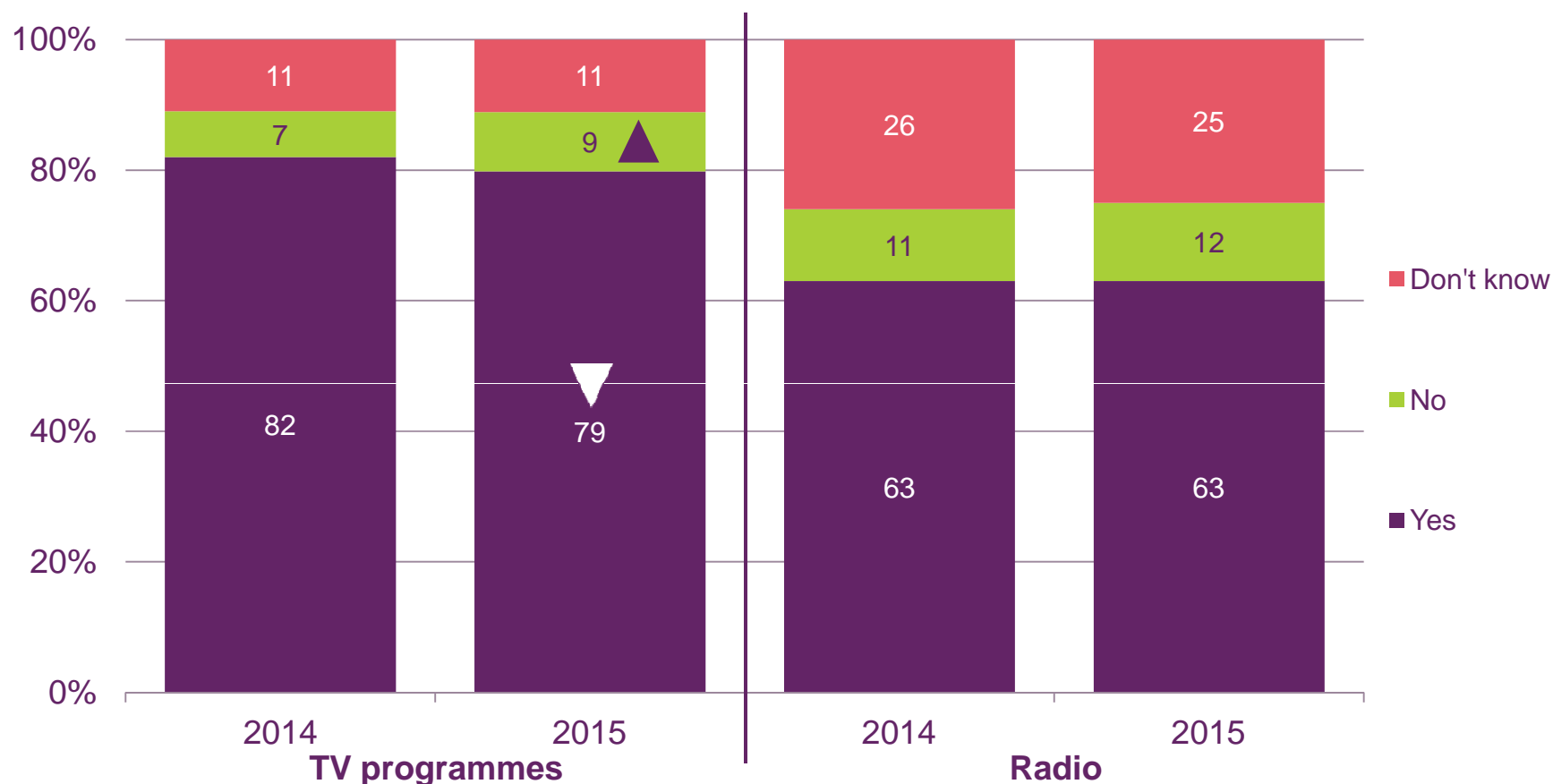
Programme which caused concern for the welfare of children taking part in TV programmes in the last 12 months



Q53 - Thinking about the programmes that you were watching at the time, looking at this list, can you say what type of programme or show it was?
Base: All seen anything on TV and were concerned about the welfare of children or young people taking part 2014 (234); 2015 (222).

Regulation

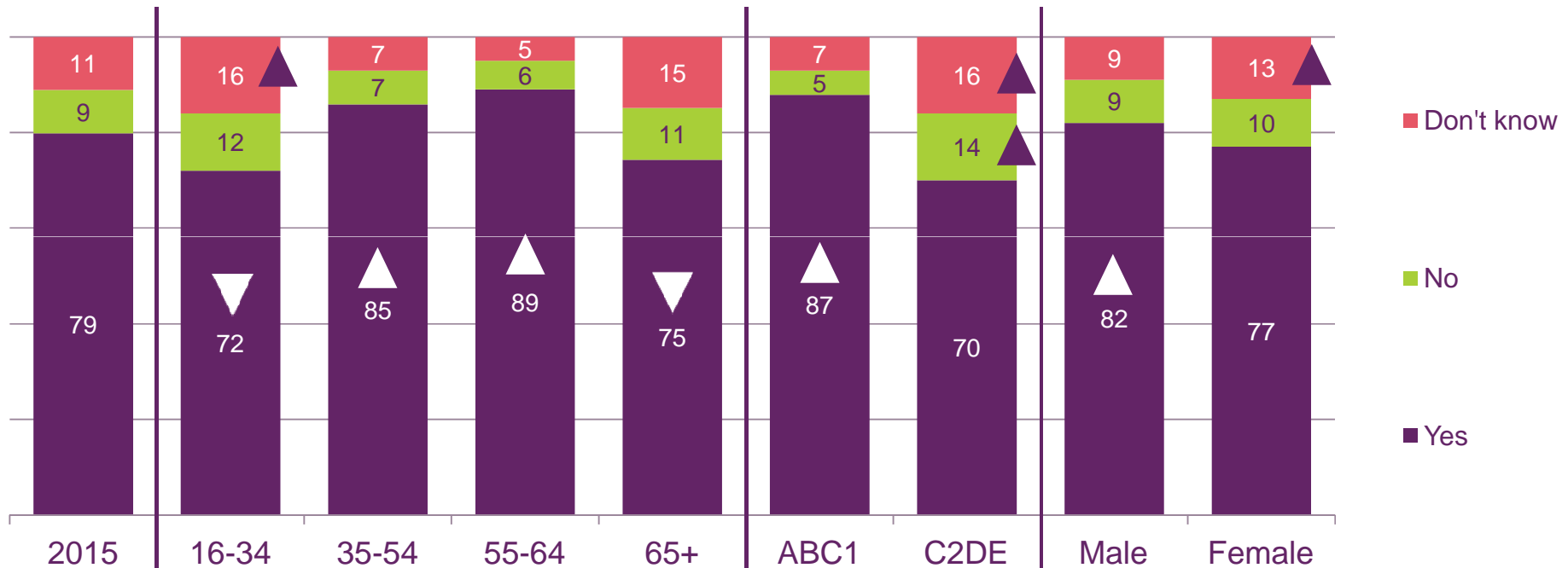
Awareness of whether TV or radio regulation currently exists



Q30/ Q34 – As far as you know, are TV programmes regulated? As far as you know, is the radio regulated in terms of what can be broadcast? (When needed note was used to define – “By regulation I mean rules or guidelines about what can and can’t be shown/ broadcast”)

Base: All respondents 2014 (2,074); 2015 (2,107).

Awareness of whether TV programme regulation currently exists

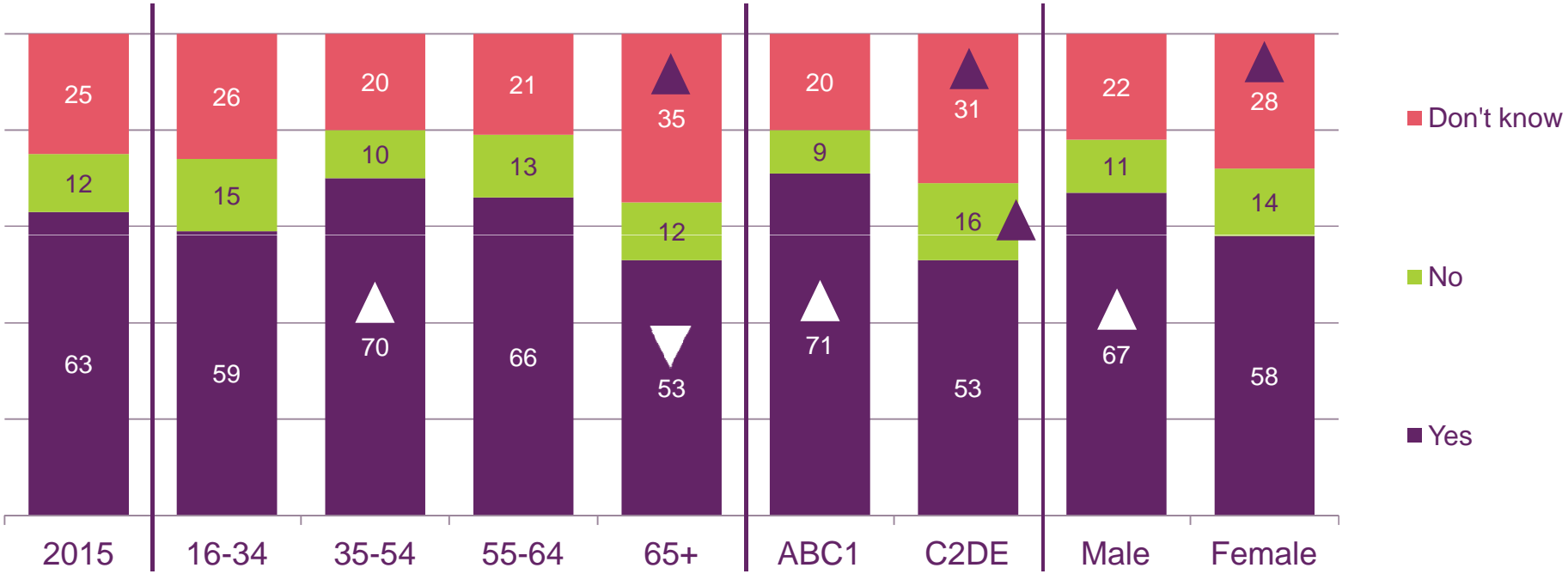


Q30 – As far as you know, are TV programmes regulated? Are there rules or guidelines about what can and can't be shown?
 Base: All in 2015 (2,107); 16-34 (620); 35-54 (675); 55-64 (344); 65+ (468); ABC1 (1,090); C2DE (1,013); Male (997); Female (1,110).

Awareness of whether radio regulation currently exists



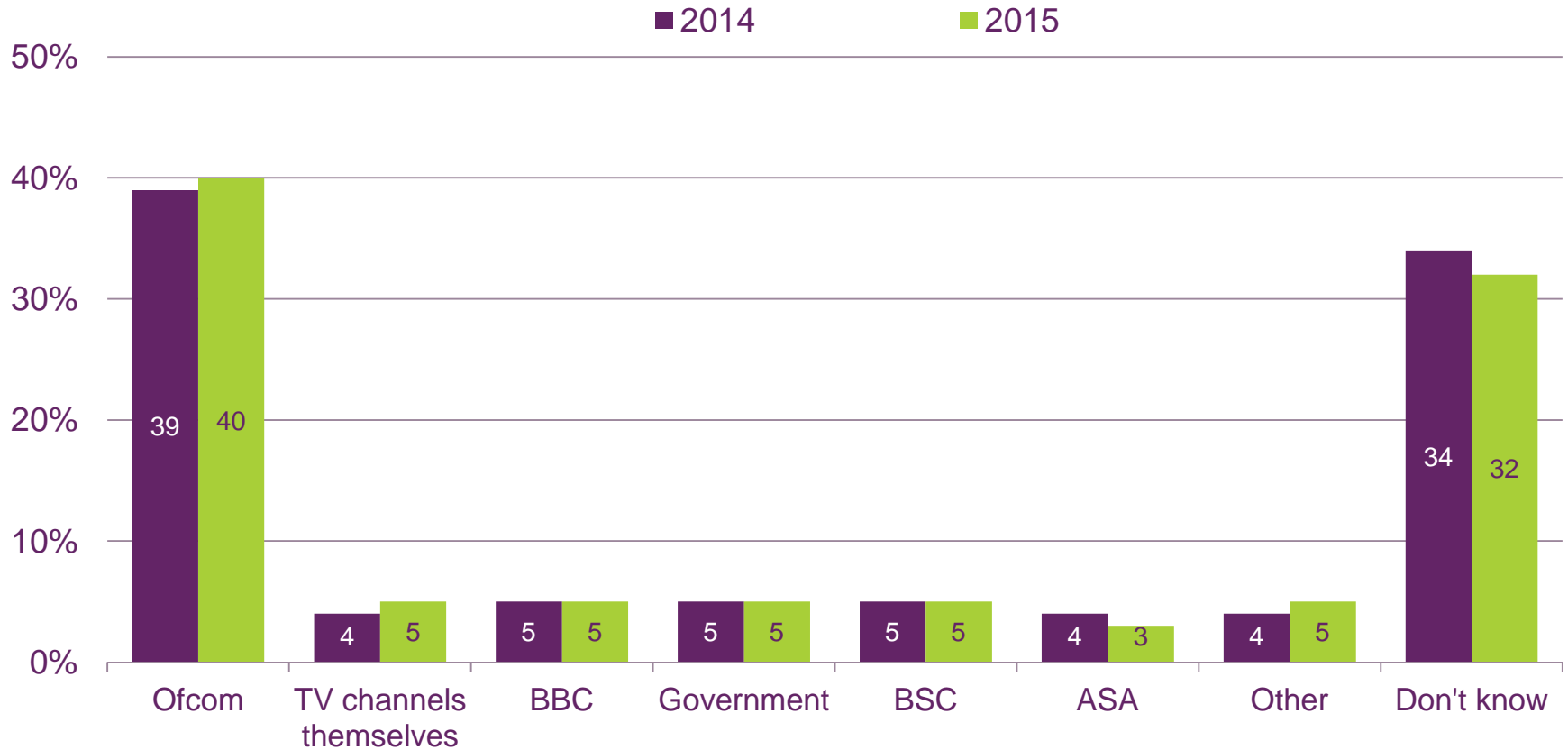
Among radio listeners, 70% say radio is regulated, 10% say radio is not regulated and 20% don't know



Q34 – As far as you know, is the radio regulated in terms of what can be broadcast? By regulation I mean rules or guidelines about what can and can't be broadcast.

Base: All in 2015 (2,107); 16-34 (620); 35-54 (675); 55-64 (344); 65+ (468); ABC1 (1,090); C2DE (1,013); Male (997); Female (1,110).

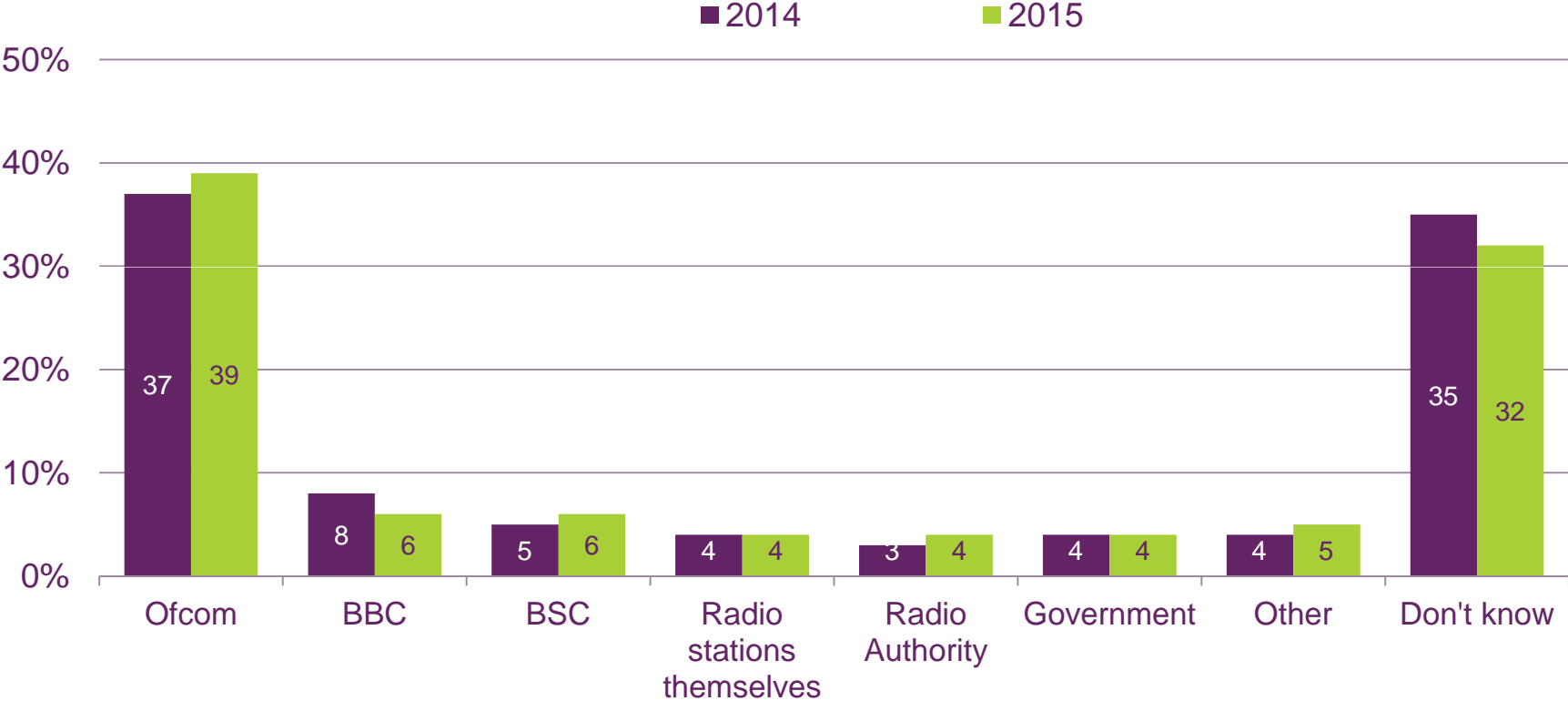
Opinion on who regulates TV programmes



Q31 - Who do you think is responsible for regulating TV programmes?

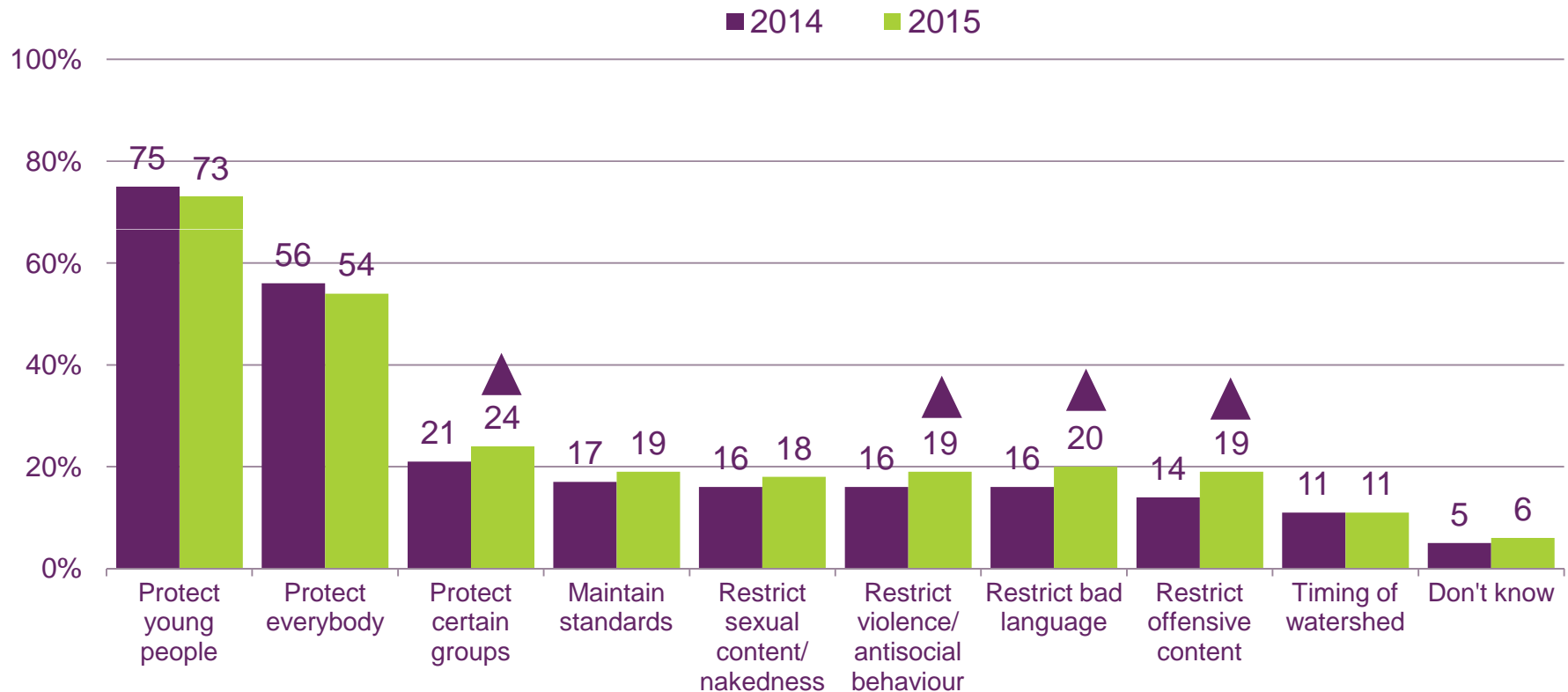
Base: All respondents aware of TV programme regulation 2014 (1,485); 2015 (1,446).

Opinion on who regulates radio



Q35 - Who do you think is responsible for regulating radio?
Base: All respondents aware of Radio regulation 2014 (1,280); 2015 (1,281).

Opinion on why TV programme regulation exists

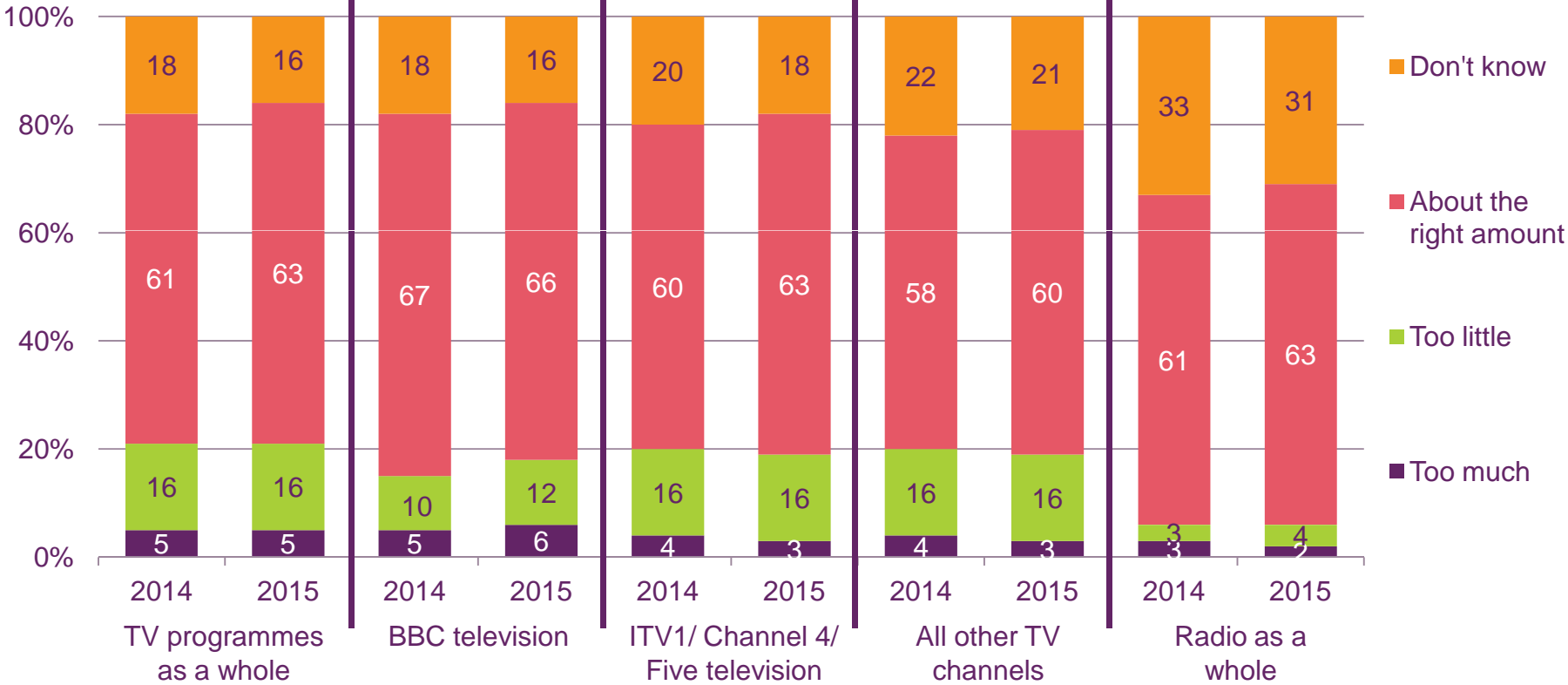


Q33 - TV programmes on all channels are supposed to follow rules or guidelines about what can and can't be shown.

Why do you think there are these rules or guidelines?

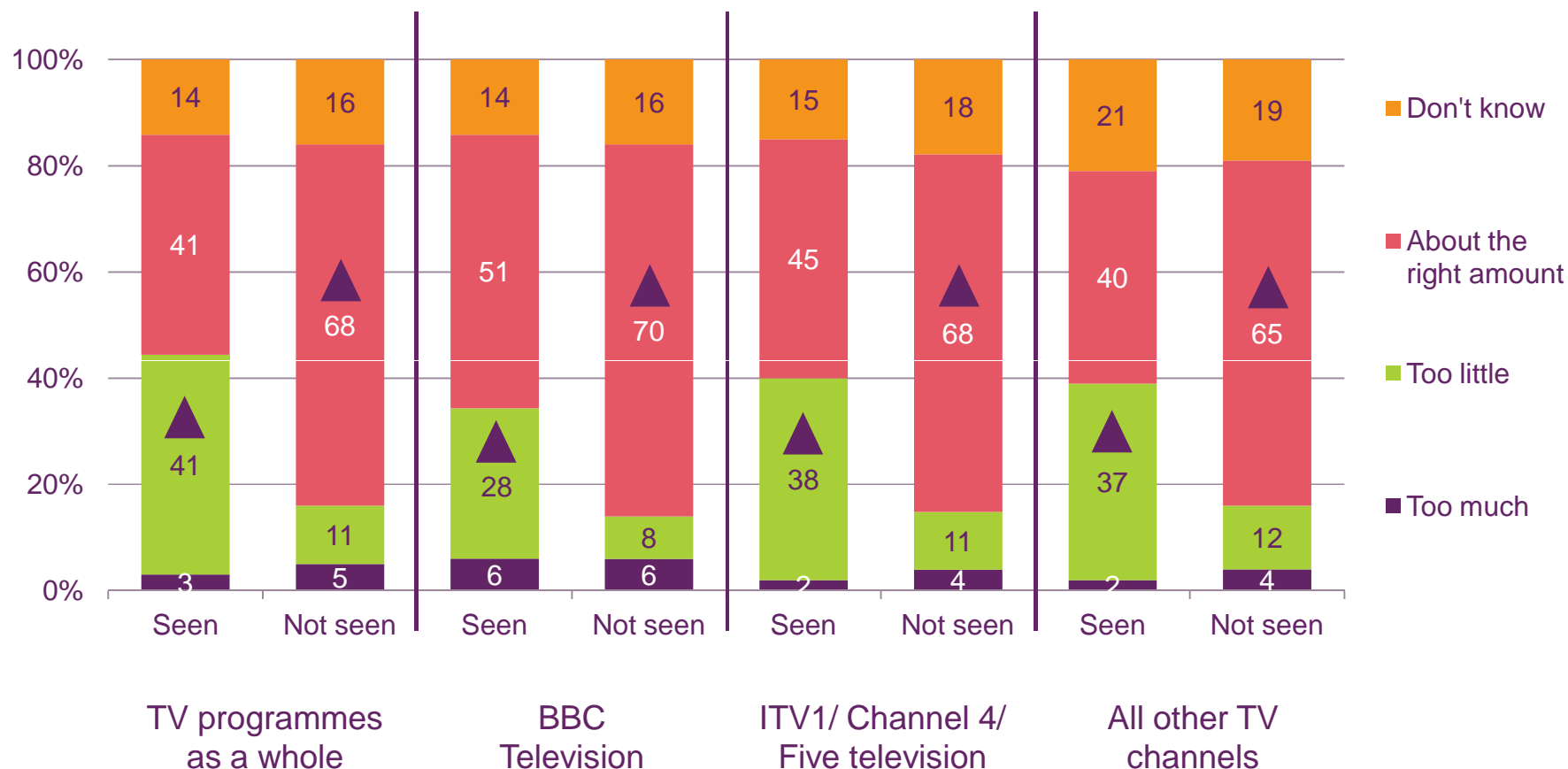
Base: All respondents in 2014 (2,074); 2015 (2,107).

Opinion on current levels of TV and radio regulation



Q32A/ Q36 - Do you think the amount of regulation for [media type] is too much, too little or about the right amount ?
 Base: All in 2014 (2,074); 2015 (2,107).

Opinion on current levels of TV regulation by whether seen something offensive on TV



Q32 - Do you think the amount of regulation for [media type] is too much, too little or about the right amount ?

Base: All with any TV sets who have seen something offensive (398); who have not seen anything offensive (1,619).

- Most adults with TV sets think the responsibility for making sure that children don't see unsuitable programmes is equally shared by parents and broadcasters (58%), while one-third think it's mainly parents' responsibility (36%) - as in 2014 and with no variation by family status in 2015
- Nine in ten (90%) viewers say they are aware that broadcasters can only show programming unsuitable for children after a certain time – also as in 2014 and with no variation by family status in 2015
- Most viewers (60%) think this time should be about 9pm, and compared to 2014 viewers are less likely to think this time should be later than 9pm (22% vs. 27%)
- One in ten (11%) viewers have felt concerned for the welfare of children taking part in TV programmes in the last 12 months, unchanged since 2014
- In 2015 three programme types are broadly equally likely to have been involved: reality (22%), soaps (20%) and drama (19%)

- Eight in ten adults believe that TV programmes are regulated, a decline since 2014 (79% vs. 82%) with an increase in those saying programmes are not regulated (9% vs. 7%)
- Six in ten adults (63%) believe that radio is regulated, unchanged since 2014
- Awareness that TV programmes and radio are regulated is higher in 2015 among 35-54s, ABC1 adults and males
- Ofcom are named as the regulator for TV by 40% of those aware of TV regulation and as the regulator for radio by 39% of those aware of radio regulation
- Most adults thought there was 'about the right amount' of regulation for TV programmes as whole (63%) and for radio as a whole (also 63%)
- For TV, around one in twenty adults believe there is 'too much' (5%) regulation while one in six think there is 'too little' (16%) regulation – unchanged since 2014
- Those who have seen something offensive, harmful or damaging are much more likely to believe there is 'too little' regulation for TV. However, this opinion does not outweigh 'about the right amount' for any group

UK audience attitudes to the broadcast media 2015

23 March 2016