



UK audience attitudes to the broadcast media

A summary of findings

Research Document

Publication date:

3 July 2014

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Section 1

About this document

The report explores UK adults' attitudes and opinions towards television and radio broadcasting, and related areas such as news consumption and privacy.

The research findings provide a valuable source of information on consumers' attitudes, and helps inform Ofcom's work on broadcasting standards.

Ofcom has been tracking audience attitudes in its current form since 2008 although some of the topics have been monitored on an annual basis since the early 1990s, when the Independent Television Commission, one of Ofcom's predecessor bodies, ran the survey.

Under the Communications Act 2003, Ofcom has a duty to draw up, and from time to time revise, a Code for television and radio services covering programme standards. This includes the protection of under-18s, the application of generally accepted standards to provide adequate protection from the inclusion of harmful or offensive material, sponsorship, product placement in television programmes, and fairness and privacy. This is known as the Broadcasting Code and came into effect in July 2005.

Ofcom recognises that peoples' view of what are generally accepted standards are subject to change over time and should be underpinned by consumer research. This report is one of a range of sources that Ofcom draws on in undertaking its duties in relation to standards on television and radio.

Section 2

Methodology

The fieldwork for the Media Tracker study was conducted for Ofcom by the research agency BDRC Continental, using face-to-face interviews conducted in respondents' homes. The questionnaire was conducted in two waves (April/May and October/November 2013) to counter potential seasonality issues. Over both halves of the fieldwork, a sample of 1,838 adults aged 16+ were interviewed and then weighted to be representative of the UK. The data presented here are based on the weighted sample (1,843).

Time series data

Some of the data in the report were collected before 2005 and were published in the ITC *The Public's View* survey. Please see http://www.ofcom.org.uk/static/archive/itc/uploads/The_Publics_View_2002.pdf for further details on the content, results and methodology.

In 2005 this survey became Ofcom's Residential Tracker, which in 2008 split into two separate surveys – the Technology Tracker and the Media Tracker. Key changes in the methodology between the 2005 and 2008 surveys include switching from continuous research to two dipstick waves, and moving from computer-assisted personal interviewing (CAPI) to paper-assisted personal interviewing (PAPI).

Where relevant, we have made some broad high-level comparisons between the 2008 and 2013 data. The pre-2008 data are presented in the chart pack¹ in the interest of providing all the available data in a single place. However, comparisons over time should be made with caution and treated as indicative only, as variances in the results may be due in part to changes in the methodology, and not necessarily indicate a shift in consumer attitudes.

¹ See Annex 1: http://stakeholders.ofcom.org.uk/binaries/research/tv-research/attitudes-to-media/Annex_1_UK_attitudes_to_broadcast_media_chart_pack.pdf

Section 3

Summary of findings

This section provides a summary of the findings set out in Annex 1.

Annex 1 provides a chart pack analysis of the research results

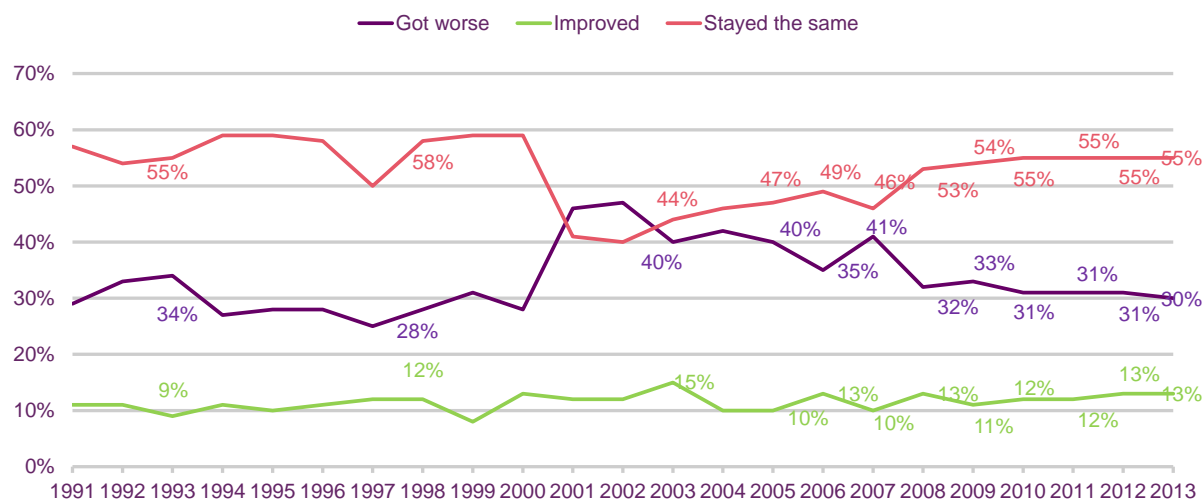
http://stakeholders.ofcom.org.uk/binaries/research/tv-research/attitudes-to-media/Annex_1_UK_attitudes_to_broadcast_media_chart_pack.pdf

In the summary report below, we have highlighted recent significant changes (since either 2011 or 2012). Where there are significant differences since 2011 (but not since 2012) we do not always include the 2012 figure in the text. All data points can be found in the accompanying slide pack.

Quality of TV programmes (see Annex 1: Slides 4 to 10)

- When asked whether TV programmes had improved, stayed the same or worsened in the past 12 months, over half (55%) of UK adults who watch TV said they had ‘stayed the same’; a similar proportion to the findings in 2008 (53%).

Figure 1 Opinion on the quality of programmes over the past 12 months



Source: Ofcom Media Tracker 2013. Q - Do you feel that over the past year television programmes have improved, got worse or stayed about the same? Base: All with TV, but excluding those never watching (1,838).

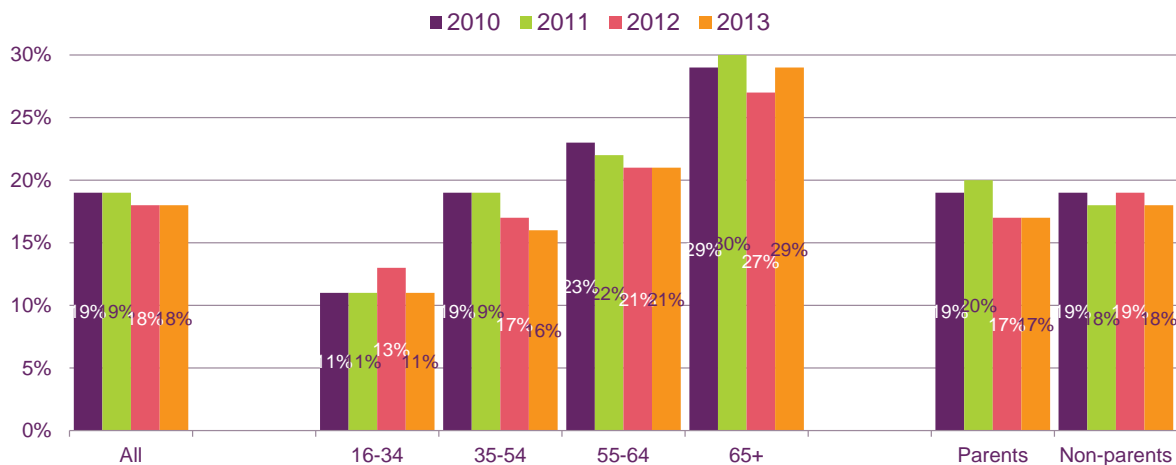
- Three in ten (30%) adult viewers said TV programmes had ‘got worse’. As in 2012, older respondents were more likely than younger people to say that programmes had got worse (47% of TV watching over-65s compared to 20% among TV watching 16-34s).
- Among those who said programmes had got worse, the top two reasons given were ‘more repeats’ (70%) and ‘lack of variety’ (52%, a significant increase from 43% in 2011).
- Just over one in ten (13%) adult viewers said TV programmes had ‘improved’. Of these, younger respondents (16-34) were more likely to feel they had improved (16% of TV watching 16-34s vs. 8% among TV watching over-65s).

- Among those who thought programmes had improved, the top two reasons given for programmes getting better were ‘wider range of programmes’ (58%) and ‘improved quality’ (41%). The proportion citing ‘more/better dramas’ as a reason increased from 22% in 2012 to 35% in 2013, while 14% (up from 6% in 2012) said that ‘more/better films’ was the reason for improvement.

Levels of offence on TV (see Annex 1: Slides 11 to 20)

- Less than a fifth (18%) of adult viewers said they had been offended by something on TV in the previous 12 months – a similar proportion to the findings in 2012 (18%).

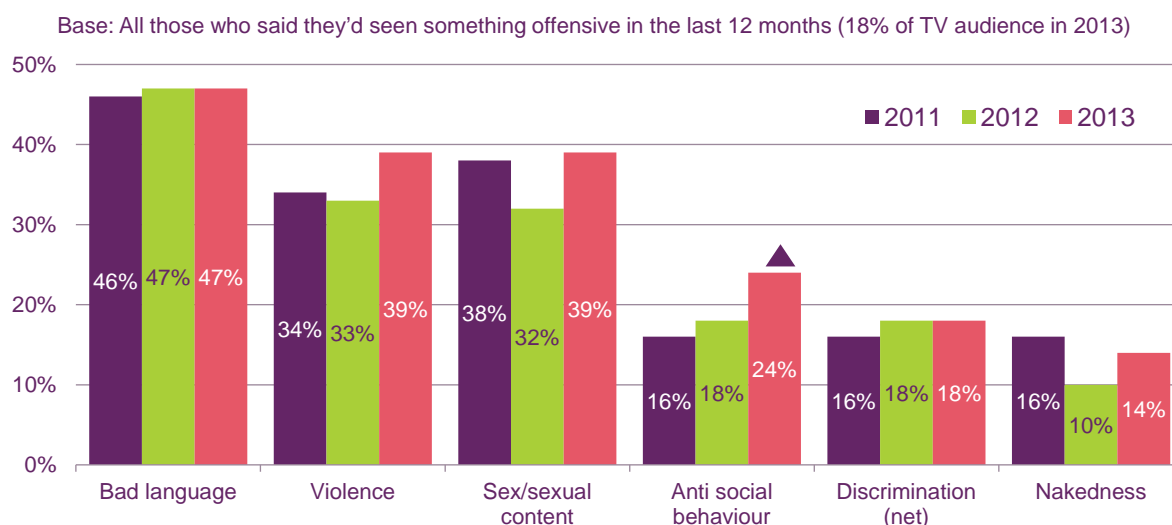
Figure 2 Overall % of respondents who have been offended by something on TV



Source: Ofcom Media Tracker 2013. Q - In the last 12 months, have you personally found anything on television to be offensive? Base: All with TV, but excluding those never watching 2013 (1,838), 2012 (1,830), 2011 (1,723), 2010 (2,104); 16-34 2013 (605), 2012 (609), 2011 (573), 2010 (643); 35-54 2013 (650), 2012 (640), 2011 (602), 2010 (710); 55-64 2013 (239), 2012 (247), 2011 (223), 2010 (328); 65+ 2013 (344), 2012 (334), 2011 (325), 2010 (423); Parents 2013 (627), 2012 (629), 2011 (581), 2010 (619); Non-parents 2013 (1,201), 2012 (1,191), 2011 (1,137), 2010 (1,478).

- Younger respondents were less likely than older people to say they had been offended (11% among TV watching 16-34s compared to 29% among TV watching over-65s).
- Among those offended, bad language (47%), violence (39%) and sexual content (39%) were the most common causes of offence. Almost a quarter (24%) of those who said they’d seen something offensive cited anti-social behaviour as the cause, a significant increase from 16% in 2011.

Figure 3 Type of material which offended



Source: Ofcom Media Tracker 2013.Q - What kind of thing offended you? Base: All who said they'd seen something offensive in past 12 months 2013 (331), 2012(322), 2011 (315). Multicode, unprompted. Top reasons charted.

- Among parent TV viewers who had been offended (17% of all parent viewers); sexual content (48%), bad language (44%) and violence (38%) were the top three causes of offence.
- Among those offended, over half (52%) reacted by switching over the channel. Audiences today are less likely than in 2008 to switch the TV off completely when they see something that offends them (32% in 2008 vs 19% in 2013) and more likely to continue watching (5% in 2008 vs 19% in 2013).
- Among those who had been offended, over two-fifths (44%) said the statement 'such things should only be shown when viewers are likely to expect them' (e.g. after a clear warning) best described their attitude towards the cause of offence. Thirty-four per cent agreed that 'even though I was offended, I accept that others should be allowed to see these things', whereas 19% thought that 'it should not have been shown'.

Attitudes towards the amount of sex, violence, swearing and harmful content on TV (see Annex 1: Slides 21 to 36)

- The majority of viewers felt that current levels of sex (66%), violence (59%) and swearing (59%) on TV are 'about right'. Since 2008 there has been a decrease in those saying there is 'too much' sex (26%, down from 35%), violence (35%, down from 55%) and swearing (35%, compared to 53% in 2008).

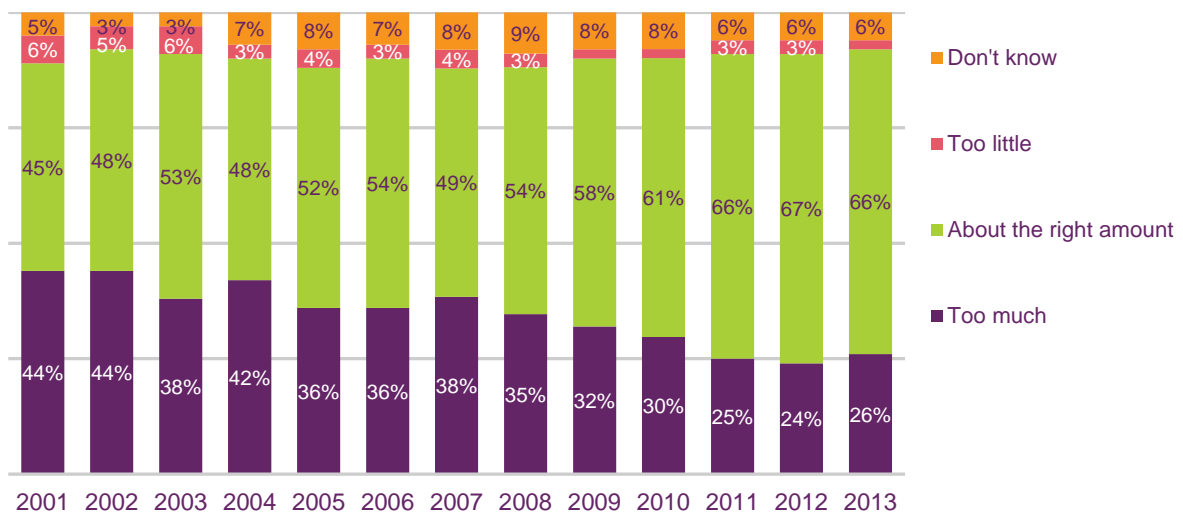
Figure 4 Opinion on the amount of sex, violence and swearing on TV



Source: Ofcom Media Tracker 2013. Q - Do you think, in general, that there is too much, too little or about the right amount of each of the following on television: a) sex? b) violence? c) swearing? Base: All with TV, but excluding those never watching (1,838). Only responses $\geq 3\%$ labelled

- Around one in four (26%) adult TV viewers felt there was 'too much' sex on TV, compared to 35% of the adult TV audience in 2008. These shifting attitudes appear to be driven by a decrease in older age groups saying there is 'too much'; in 2008, 57% of over-65s who watch TV said there was 'too much' compared to around four in ten (42%) in 2013. In comparison, the proportion of TV watching 16-34s saying there is 'too much' sex on TV has remained stable at around a fifth (18% in 2013 compared to 20% in 2008).

Figure 5 Opinion on the amount of sex on TV



Source: Ofcom Media Tracker 2013. Q - Do you think, in general, that there is too much, too little or about the right amount of each of the following on television: a) sex? Base: All with TV, but excluding those never watching (1,838). Only responses $\geq 3\%$ labelled

- Older respondents (55-64 year olds and over-65s) were more likely than younger respondents to think there was 'too much' violence on TV. Since 2008 the proportion of TV watching over-65s saying there was too much has declined significantly; from three-

quarters (75%) to around half (52%) in 2013. This compares to 40% of TV watching 55-64s and around a quarter (24%) of the 16-34 audience who felt there was 'too much' in 2013.

Figure 6 Opinion on the amount of violence on TV



Source: Ofcom Media Tracker 2013. Q - Do you think, in general, that there is too much, too little or about the right amount of each of the following on television: b) violence? Base: All with TV, but excluding those never watching (1,838). Only responses ≥ 3% labelled

- Since 2008 there has been a significant increase in over-65s saying there is 'about the right amount' of swearing on TV, from almost a fifth (18%) of TV watching over 65s to around two-fifths (39%) in 2013. This compares to seven in ten (71%) TV watching 16-34 year olds, six in ten (61%) TV watching 35-54 year olds and half (50%) of the 55-64 TV audience who thought there was 'about the right amount' of swearing on TV in 2013.

Figure 7 Opinion on the amount of swearing on TV



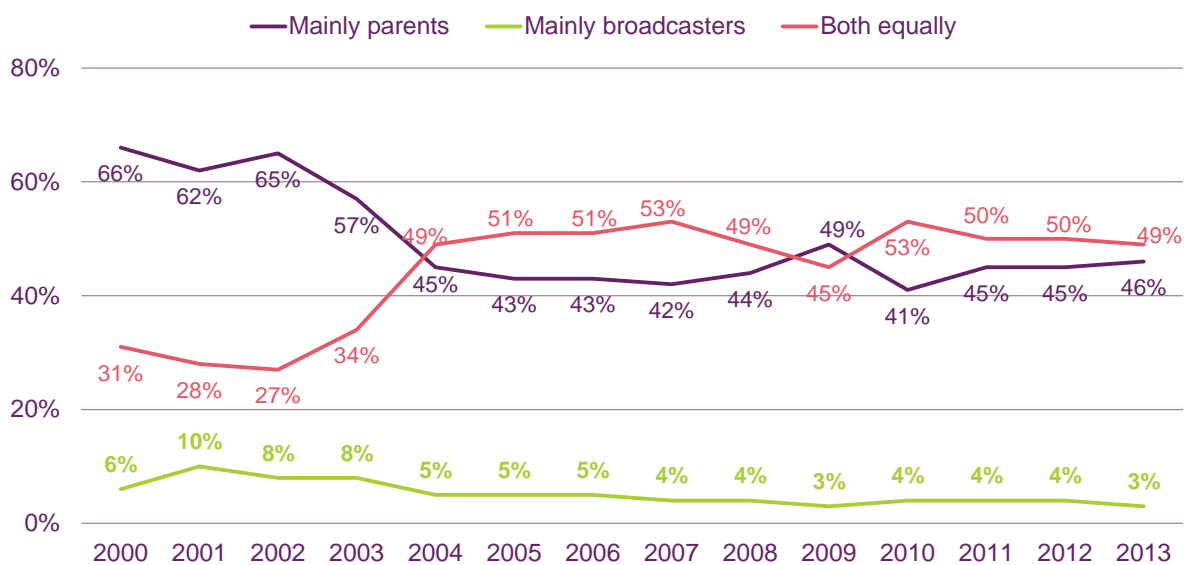
Source: Ofcom Media Tracker 2013. Q - Do you think, in general, that there is too much, too little or about the right amount of each of the following on television: c) swearing? Base: All with TV, but excluding those never watching (1,838). Only responses ≥ 3% labelled

- Fifteen per cent of TV viewers said they had seen something on TV in the past 12 months that they thought was harmful, either to themselves, or to other adults or children; a similar proportion as in 2012 (16%).
- Among those who said they had seen something harmful, over two-fifths reacted by switching channels (43%), followed by a fifth (20%) who switched off the TV completely and 22% who reacted by discussing it with others (up from 11% in 2012). The rise in those reacting by discussing with others might be accounted for by people discussing it via social media; Ofcom research shows that two-thirds (66%) of online adults say they have a current social networking site profile, with 60% of users visiting sites more than once a day.²

Protection of children and the TV watershed (see Annex 1: Slides 37 to 48)

- Around half (49%) of the adult TV audience felt it was the responsibility of both broadcasters and parents to make sure that children do not see unsuitable programmes, followed by 46% who felt it was mainly parents’ responsibility, and 3% who felt it mainly the broadcasters’ responsibility.

Figure 8 Opinion on whose responsibility it is to ensure children do not see unsuitable programming



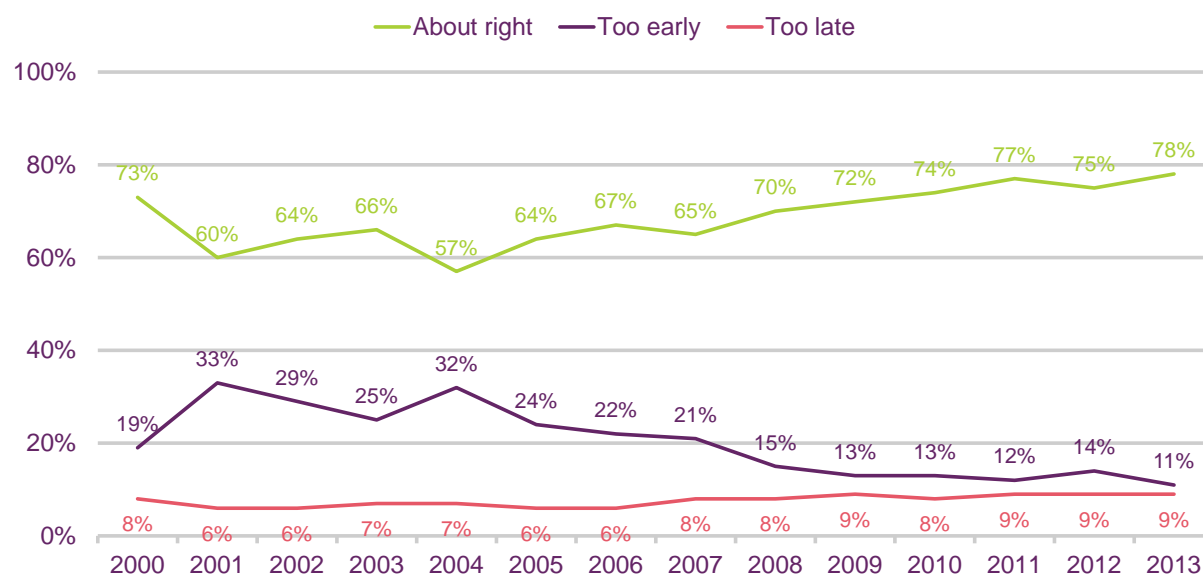
Source: Ofcom Media Tracker 2013. Q - Do you think it is mainly the responsibility of parents, broadcasters or both equally, to make sure that children don't see unsuitable programmes? Base: All with TV, but excluding those never watching (1,838)

- Among TV watching parents, parents with children under the age of five were more likely than those with older children to say responsibility lies mainly with parents (51% vs. 44% of parents with children between five and 10 and 43% of parents with children aged between 11 and 16).

² Adults’ Media Use and Attitudes report 2014, Ofcom, April 2014. <http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/adults-media-lit-14/>

- Most adults who watch TV (94%) were aware that broadcasters are required to show television programmes that are not suitable for children only after a certain time in the evening (down two percentage points since 2012).
- Audiences in 2013 were more likely than in 2008 to think the 9pm watershed was at about the right time, with over three-quarters (78%) of respondents saying so (compared to 70% in 2008).

Figure 9 Opinion on the time of the watershed



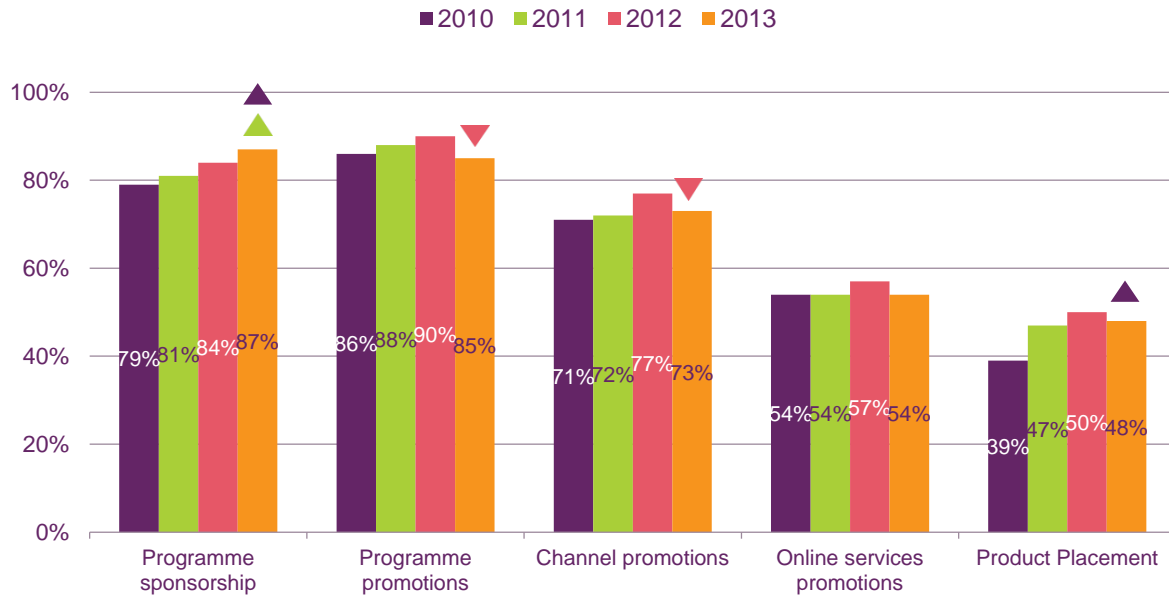
Source: Ofcom Media Tracker 2013. Intro to question: On TV channels the time after which these programmes unsuitable for children may be shown is 9pm - usually known as the 9 o'clock watershed. Q - Do you think this is....about right/too early/too late? Base: All with TV, but excluding those never watching.

Attitudes towards TV advertising, sponsorship, product placement and promotions (see Annex 1: Slides 49 to 51)

- Product placement in films and international programmes (such as US drama series) has been allowed on UK television for many years. Since 28 February 2011 TV programmes made for UK audiences have been permitted to contain product placement as long as they comply with [Ofcom's rules](#)³. In 2013, almost half (48%) of adult TV viewers were aware of product placement.
- Awareness of programme sponsorship has increased to 87% of adult TV viewers, compared to 84% in 2012, while awareness of programme promotions has decreased from 90% in 2012 to 85% in 2013. Awareness of channel promotions fell to 73% of the adult audience, compared to 77% in 2012.

³ For more information see <http://consumers.ofcom.org.uk/2011/02/product-placement-on-tv/>

Figure 10 Awareness of commercial messages



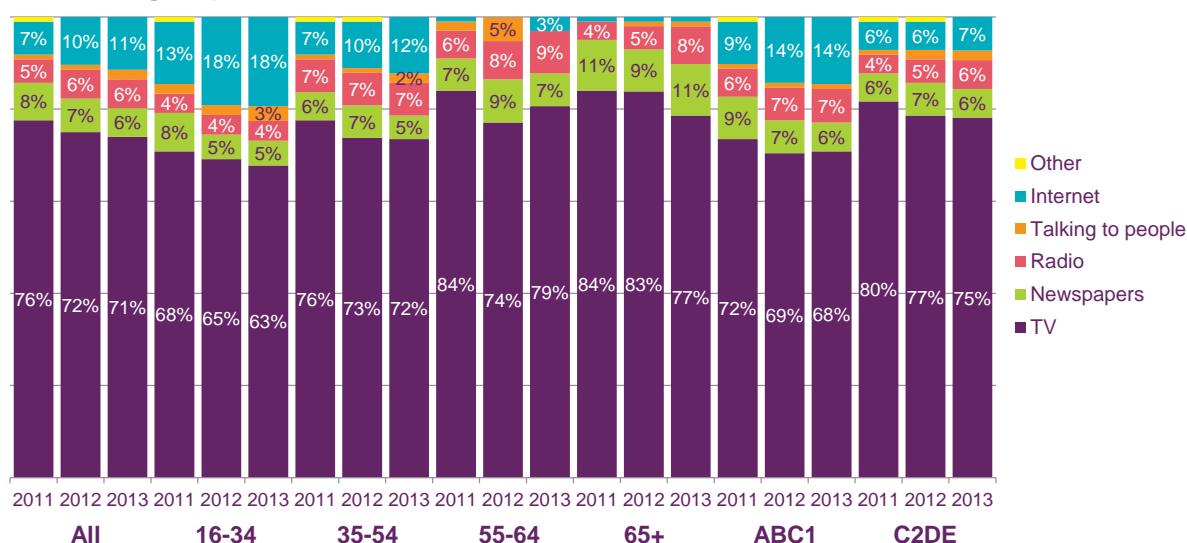
Source: Ofcom Media Tracker 2013. Q - Which of the following are you aware of on television? Base: All with TV, but excluding those never watching 2010 (2,104), 2011 (1,723), 2012 (1,830), 2013 (1,838). Prompted. multicode.

- Attitudes towards the amount of advertising on the five main channels were broadly split. Almost half (47%) of adults who watch TV stated that present levels of advertising on the five main TV channels ‘don’t bother me but I would not want any more’ while almost two in five (38%) agreed there was ‘already more than I am really happy with’.
- Among those who were aware of programme sponsorship, 56% said ‘present levels don’t bother me but I would not want any more’, while over a fifth (22%) said ‘there is already more than I am really happy with’.

News – sources used and attitudes towards impartiality (see Annex 1: Slides 52 to 65)

- While TV remains the main source of news for what is going on in the UK and around the world, for all respondents, this figure decreased significantly between 2011 and 2013; from 76% to 71%. The second most popular medium for getting UK and world news was the internet (11% of respondents); a significant increase on 2011 (7%). Among 16-34s this figure increased from 13% in 2011 to 18% in 2013.

Figure 11 Respondents' main media source for UK and world news, by age and socio-economic group



Source: Ofcom Media Tracker 2013. Q - Can you tell me what, if anything, is your main source of news about what is going on in the UK and in the world today? Base: All; 16-34 2011 (582), 2012 (614), 2013(620); 35-54 2011 (612), 2012 (649), 2013(668); 55-64 2011 (228), 2012 (249), 2013(246); 65+ 2011 (332), 2012 (342), 2013(359); ABC1 2011 (960), 2012 (978), 2013(1013); C2DE 2011 (794), 2012 (876), 2013(880). Only responses ≥ 3% labelled.

- For local news, TV was also the main source for the majority of respondents (50%), followed by newspapers (13%) and the internet (10%).
- The rate of decrease in perceptions of impartiality in television news, seen between 2010 and 2012, has slowed (57% in 2013 compared to 66% in 2010)⁴. Year on year, no change was seen in perceptions of impartiality among the broadcasters asked about, except for ITV. Since 2012, the proportion of those saying ITV was impartial dropped from 44% to 40% in 2013.

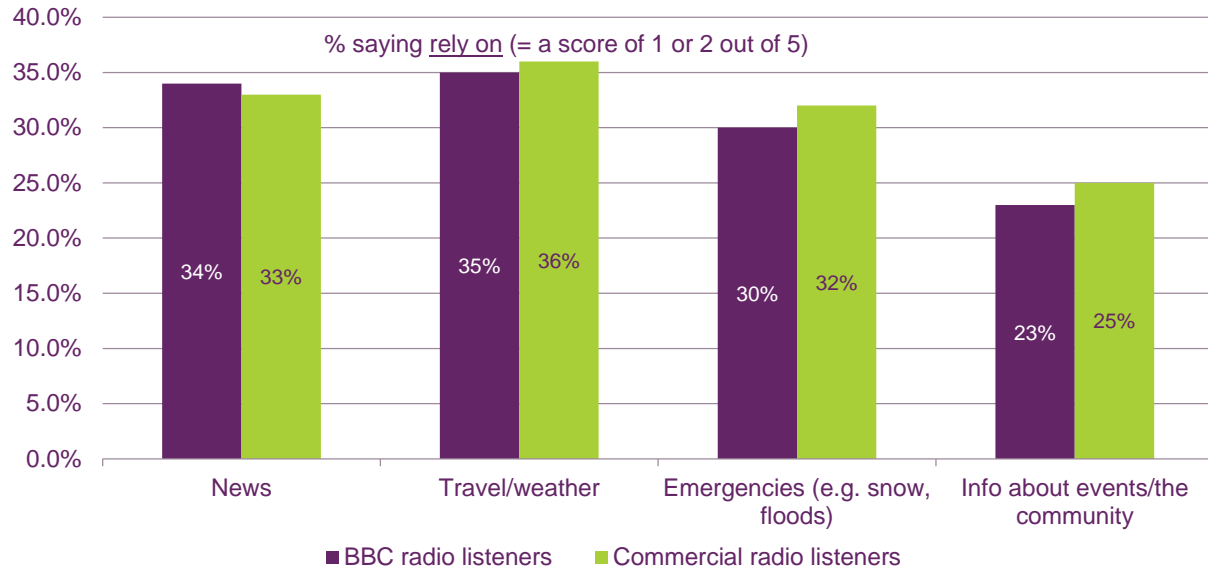
Radio (see Annex 1: Slides 66 to 73)

- As in 2012, 76% of respondents said they listened to the radio at least several times a week, while around half (48%) said they listened to the radio every day.
- Older age groups were more likely to say they listened every day (36% of over-65s vs. 13% of 16-24 year olds).
- Levels of offence related to radio remained very low; among those who listen to the radio, 1% said they had personally heard something on the radio that they found offensive in the past 12 months. This compares to 2% in 2012.
- Radio listeners were asked to rate the extent to which they personally relied on BBC/commercial radio stations for coverage of certain local issues and events, with a score of 1 being 'completely rely on' and 5 'do not rely on at all'. Looking at the top two

⁴ For more detail on the declining perceptions of impartiality in television news see Annex 2, Attitudes towards the impartiality of television news

ratings, results among BBC and commercial stations showed little differences. About a third of commercial radio listeners and BBC radio listeners said that they relied on the radio for coverage of local news (33% vs. 34%), travel/weather (36% vs 35%) and emergencies such as snow and floods (32% vs. 30%).

Figure 12 Reliance on BBC/commercial stations for local issues and events



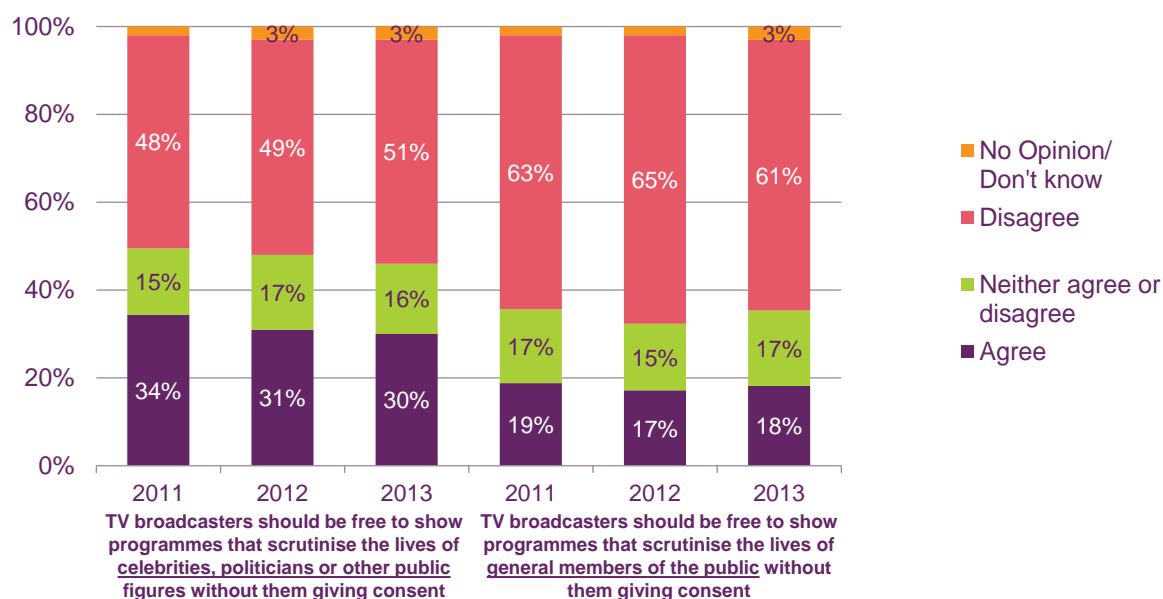
Source: Ofcom Media Tracker 2013. Q - To what extent do you personally rely on BBC / commercial radio stations for coverage of the following local issues and events? Base: All who listen to BBC radio stations (1,187); All who listen to commercial radio stations (1,281).

- Over half (56%) of those who listen to commercial radio stations agreed with the statement that present levels of advertising and programme sponsorship ‘don’t bother me but I would not want any more’. A quarter (25%) agreed with the statement ‘there is already more than I am really happy with’ (a significant increase compared to 21% in 2011) and 11% claimed they are ‘not really bothered by it’.

Attitudes towards privacy (see Annex 1: Slides 74 to 76)

- When asked about their attitudes towards privacy on television, around half of respondents (51%) disagreed with the statement: ‘broadcasters should be free to show programmes that scrutinise the lives of celebrities and politicians without their consent’. Sixty-one per cent disagreed that ‘TV broadcasters should be free to show programmes that scrutinise members of the general public without them giving consent’.

Figure 13 Level of agreement with statements relating to TV programmes about people's lives



Source: Ofcom Media Tracker 2013. Q - Please can you tell me to what extent do you agree or disagree with each of the following statements I'm going to read out. Base: All respondents 2011 (1,754); 2012 (1,854), 2013 (1,893)? Only responses ≥ 3% labelled.

- Thirty per cent agreed that 'broadcasters should be able to show programmes that scrutinise the lives of celebrities and politicians without their consent' (a significant decrease compared to 34% in 2011). Less than a fifth (18%) agreed that 'broadcasters should be free to show programmes that scrutinise the lives of members of the general public without them giving consent'.
- Newspapers were seen as the medium that is most intrusive into the lives of people in the public eye (43%) and the general public (45%), followed by TV (26% and 27% respectively) and magazines (20% and 10% respectively).

Figure 14 Opinion on the medium that is most intrusive into lives of people in the public eye/ members of the general public

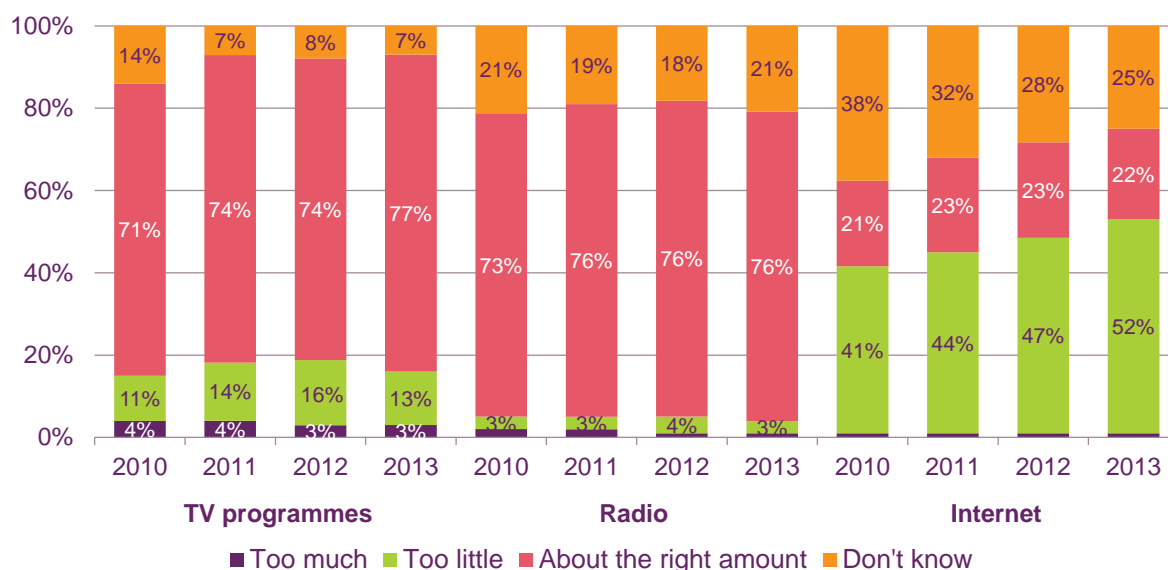


Source: Ofcom Media Tracker 2013. Q - Thinking specifically about people in the public eye (that is, celebrities, politicians and other public figures), which one, if any, of these sources do you feel is the most intrusive into the lives of these people? Q - Now thinking specifically about members of 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 (1,893). Only responses ≥ 3% labelled

Attitudes towards regulation (see Annex 1: Slides 77 to 92)

- As in 2012, the majority of respondents (88%) were aware that TV programmes were regulated.
- Over three-quarters (77%) of respondents felt that the current levels of TV regulation were ‘about right’, a similar proportion to radio (76%).
- Over half (52%) of respondents, compared to 47% in 2012, thought there was ‘too little’ regulation of the internet. Among parents, 57% felt that the current levels of regulation were too little (compared to 50% of non-parents). When prompted, over half (54%) of those who thought there was too little regulation cited to ‘protect children/young people’ as their reason for thinking this.

Figure 15 Opinion on current levels of regulation



Source: Ofcom Media Tracker 2013. Q - Do you think the amount of regulation for [media type] is: i) Too much? ii) Too little? iii) About the right amount? Base: All respondents 2010 (2,141), 2011 (1,754), 2012 (1,854), 2013 (1,893). Only responses $\geq 3\%$ labelled.

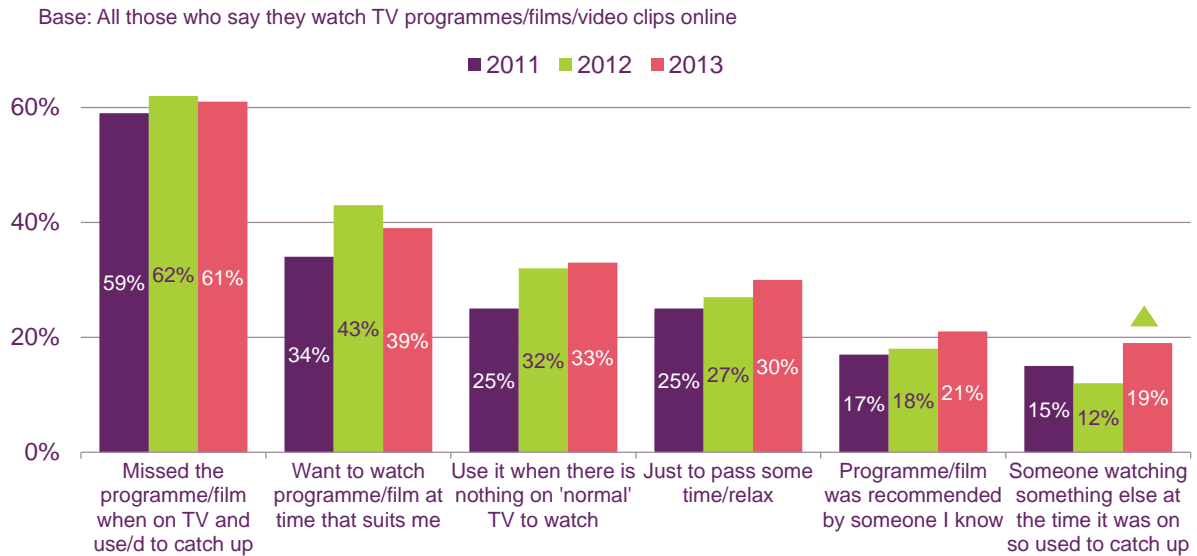
- Almost four-fifths (79%) of respondents were aware that it is possible to watch/ download programmes online, compared to 73% in 2012. Although awareness declined with age (85% of 16-34s vs. 60% of over-65s), among 55-64 year-olds awareness has risen to 79% (up from 66% in 2012).
- Among those aware that it is possible to watch/ download programmes online on TV broadcasters' websites, over half (52%) thought this content was regulated in terms of what can and can't be shown.

Take-up and use of on-demand services (see Annex 1: Slides 93 to 122)

- Almost four in ten (39%) internet users said they used the internet to watch TV programmes online or download from TV broadcasters' websites, compared to 35% in 2012.
- Since 2011, the proportion of internet users who said they used the internet to watch TV clips online, and download from websites other than the TV broadcasters' websites, has increased from 33% to 39% in 2013. Among 35-54 year olds in particular, there has been a significant increase in those who claim to watch TV clips online or download them from these websites (32% in 2012 vs 40% in 2013).
- Among those who said they watched TV/films/video clips via the internet, 57% said they did so at least several times a week, rising to 69% of 16-34s. Seventeen per cent of 16-34 year olds who said they watched TV/films/video clips via the internet said they did so every day.

- Among those who use online ‘video on demand’⁵ the top three reasons for doing so were for catching-up on missed content - ‘missed the programme/film when on TV’ (61%), for added convenience - ‘want to watch programme/film at a time that suits me’ (39%) and, for greater choice - ‘use it when there is nothing on normal TV to watch’ (33%). Compared to 2012, there has been an increase in the proportion saying they use online video on demand because ‘someone was watching something else at the time it was on so used it to catch up’ (from 12% in 2012 to 19% in 2013).

Figure 16 Reasons for online on-demand use



Source: Ofcom Media Tracker 2013. Q - What would you say are the reasons you watch/watched programmes online or download from TV broadcaster websites? Base: All who use online ‘video on demand’ 2013 (829), 2012 (725), 2011 (658). Note: Only responses ≥ 10% charted. All responses unprompted.

⁵ Q: Do you watch TV programmes/films/video clips in any of the following ways on the internet (via any device, e.g. PC, mobile phone), either at home or elsewhere? Quoted figure base includes all those who watch TV programmes online or download from TV broadcasters’ websites (such as BBC iPlayer, ITV player, 4OD, Demand Five, or Sky Go) and all those who watch TV clips online or download from other websites (e.g. YouTube).