



BBC LOCAL VIDEO

RESEARCH INTO THE EXPECTED TAKE-UP
AND IMPACT OF A PROPOSED BBC LOCAL
VIDEO SERVICE

A QUANTITATIVE RESEARCH REPORT BY SPA PREPARED
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1 EXECUTIVE SUMMARY

1.1 ABOUT THE PROPOSED BBC LOCAL VIDEO SERVICE

The BBC has proposed the launch of an on-demand, Local Video service delivered via both fixed and mobile Internet Protocol broadband networks within the UK.

The proposed service would provide local news, sport, weather, and other types of local content across sixty regions in the UK. Content would be made available as both individual clips and in bulletin format for each local area on BBC Local websites. All content would be free to viewers and would not be shown alongside advertisements.

On average, up to ten new local video stories a day would be available in each local area, with a maximum average of 20 minutes of video content per day. Overall, these stories would focus predominantly on news and sport but would also cover weather, and local community content. For each region, there would be three short daily bulletins respectively for news, sport and weather.

1.2 BACKGROUND TO THE MARKET IMPACT ASSESSMENT

Any new or proposed significant change to a BBC service, such as the proposed BBC Local Video service, is subject to a Public Value Test (“PVT”). A PVT is a study that assesses the ‘public value’ of the proposed changes against its impact on the market.

One of the key components of the PVT is a Market Impact Assessment (“MIA”), which is conducted by Ofcom and estimates the expected impact on other products and services that would result from the introduction of a BBC service. In order to carry out its MIA, Ofcom has commissioned primary market research to assess the potential audience reaction to the proposed BBC Local Video service and its impact on their current consumption of local media. This research will then be used by Ofcom to aid the analysis and completion of the MIA.

This report presents the independent analysis and findings from the primary consumer research that was conducted by SPA, an independent research agency, on behalf of Ofcom.

1.3 CURRENT LOCAL NEWS MEDIA CONSUMPTION

The vast majority of the population consume local media on a monthly basis

Local news media consumption in the UK is high, with more than nine in ten people (93%) currently consuming local content in a typical month. Local content is consumed by at least nine in ten people across both genders, all age groups, all social grades and all Government Office regions and nations.

Local news stories are the most popular type of local content, accessed at least monthly by three-quarters of the population.

Overall, levels of local content consumption are not significantly different when comparing those with broadband at home (94%) with those who do not have access (93%).

Traditional media (Broadcast TV, Newspapers and radio) are the principal methods used to access local content

Traditional media sources such as TV (ITV regional news is viewed weekly by 70%) and newspapers (72% read weekly) are both around four times as likely to be accessed as websites with local content (18% use weekly).

Commercial local radio is also markedly more popular than the internet as a source of local news media, with just under half (47%) listening weekly.

The BBC's 'BBC Local' website is currently the most popular method of accessing local content online

The BBC Local website is accessed weekly by forty percent of those who access websites with local news on a weekly basis – equivalent to seven percent of the population¹. The ITV Local website is less popular, accessed by fifteen percent of those who visit local websites weekly.

Collectively, more than a third of those people who currently visit websites with local news content weekly visit newspaper websites (37%). This is the equivalent of seven percent of the total population.

Local commercial radio station websites are accessed by eight percent of those who visit websites with local news weekly (less than 2% of the population).

Seventeen percent of those people with broadband at home claim to watch local news video clips online in a typical week

The proportion of people who view local news videos online each week differs markedly by demographics, with usage higher amongst males (22%), those aged 15-34 (24%) and those in the AB social grade (23%). Local news online videos are also noticeably more likely to be viewed in London (34%) than in other regions.

¹ This figures rises to 10% amongst the broadband population.

1.4 PERCEPTIONS OF LOCAL CONTENT

A clear majority consider local content to be an ‘important’ form of media

Around three-quarters of the UK population rate local news stories (79%) and local weather (74%) as ‘important’ types of media. Local life and community stories are also considered ‘important’ by three in five (60%) people.

While less popular, around half also consider local travel news (54%) and local sport coverage (46%) to be important.

While most people are happy with current levels of local news coverage, demand does exist for greater and more in-depth local coverage

Around three-quarters (76%) believe there is ‘enough’ coverage of ‘local news stories’ in the UK media. Thirteen percent believe that there is ‘not enough’ coverage available at present.

Furthermore, more than a quarter agreed that they ‘would like to access more in-depth local news programmes’ (27% total population, 28% those with broadband at home).

1.5 EXPECTED TAKE-UP OF THE BBC LOCAL VIDEO SERVICE

In total, more than one-third said they would use the BBC Local Video service, with this figure rising to almost half amongst those with broadband internet access at home²

Thirty-seven percent expect to take-up the BBC Local Video service if it was launched in the format described (‘probably’/‘definitely’ use). The proportion who said they would ‘definitely’ use the service is markedly lower at thirteen percent.

As anticipated, those with broadband at home are significantly more likely than those without broadband to say they would use the local video service (47% vs. 18% ‘probably’/‘definitely’ use).

Those people who are already consuming local content online or watch online video are much more likely to find the service appealing:

- Current weekly visitors to local websites (71% would ‘probably’/‘definitely’ use)
- Those who watch video online (61% would ‘probably’/‘definitely’ use)

An existing relationship with BBC websites is also likely to have an impact on likelihood to use the service, with those who already visit the BBC Local website weekly (65% said they would ‘probably’/‘definitely’ use) and those who visit the BBC News website weekly (71% ‘probably’/‘definitely’ use) significantly more likely to use the service.

² Note that take-up is based on expectations at the time of the survey. Survey limitations will exist as the survey presumes 100% awareness, exposure to the service in a consistent manner and that the live service matches the concept shown to respondents during the survey.

Variations in likely take-up levels are also evident by Government Office regions, with those in the South East (55% 'probably'/'definitely' use) and Wales (48% 'probably'/'definitely' use) more likely than average to say they would use the local video service. In contrast, those in Scotland (18% 'probably'/'definitely' use), the North East (25% 'probably'/'definitely' use), Yorkshire (20% 'probably'/'definitely' use) and the West Midlands (29% 'probably'/'definitely' use) are less likely to use the service.

Other groups who are significantly more likely than average to take-up the service include:

- Those in the AB social group (46% said 'probably'/'definitely' use)
- Those with children living in the household (46% said 'probably'/'definitely' use)
- Those living in rural areas (44% said 'probably'/'definitely' use)
- Those aged between 25 and 44 (44% said 'probably'/'definitely' use)

A preference for traditional media sources is the main reason why those unlikely to use the service do not intend to use it

Amongst those with broadband who do not expect to use the BBC Local Video service, forty-three percent state a preference for 'more traditional media' as the reason why they do not expect to use it.

Those without broadband are most likely to cite a lack of internet access as the main reason they are unlikely to use the service (62%). Three in ten amongst this group cite a preference for traditional media (29%).

The BBC Local Video service is most likely to be accessed in the home, via a desktop computer and with relatively short viewing sessions

On a typical weekday most likely users will use the service while at home (91%). The service is much less likely to be accessed at work (10%) or while travelling/commuting (2%).

Nine in ten users expect to use the service via a personal computer compared to just fourteen percent who intend to access via mobile phone. Those people who say they would use the service but do not have broadband access at home are more likely to use the service via mobile than those with broadband (28% vs. 11%).

The average expected viewing time per session amongst those who expect to use the BBC Local Video service is around quarter of an hour.

The local content most likely to be accessed via the BBC Local Video service closely reflects overall local content consumption as a whole

Local news stories (93% would use monthly) and weather (86% would use monthly) are the content types most likely to be accessed via the BBC Local Video service.

Four in five of likely users (79%) expect to access local life and community stories monthly.

Other types of content are likely to be less popular amongst users:

- 68% of likely users expect to access local travel news monthly
- 56% of likely users expect to access local sports news monthly

1.6 IMPACT OF THE BBC LOCAL VIDEO SERVICE³

The BBC Local Video service is likely to increase the total level of local news media consumed in the UK

In total, fifty-six percent of those who expect to use the service say they would increase the amount of local news they consume if the BBC Local Video service was launched. This represents twenty-one percent of the population.

In contrast, forty-one percent of those likely to use the service (equivalent to sixteen percent of the population) say they would use the service but consume the same level of local news media. Therefore, it is likely that some of these people would reduce their consumption of other local news as a result of their use of the BBC Local Video service.

Most users of existing sources of local content would not expect to change their consumption of these media if the BBC Local Video service was launched

All those who said they were likely to use the local video service were asked whether they would expect to change their consumption of other existing sources of local news.

If the BBC Local Video service was to launch, users would be most likely to use websites with local content less:

- Fourteen percent of weekly local newspaper website visitors would expect to use these websites less (4% a lot less, 11% a little less). None would stop their usage
- Thirteen percent of weekly visitors to other types of website with local news expect to use them less (3% a lot less, 9% a little less). None would stop their usage⁴

Users would be least likely to use local broadcast media less if the BBC Local Video service launched:

- Six percent of weekly ITV regional news viewers would expect to watch less often (2% a lot less, 4% a little less)
- Three percent of weekly local commercial radio station listeners would expect to listen less often (1% a lot less, 2% a little less). None would stop listening

For each type of local newspaper reader, similar proportions would expect to read them less if the BBC introduced the local video service:

- For paid for weekly local newspapers, seven percent expect to use less (3% stop, 3% a lot less, 2% a little less)⁵
- For paid for daily local newspapers, seven percent say they would read less (1% stop, 3% a lot less, 3% a little less)
- For free weekly local newspaper readers, six percent say they would read less (2% a lot less, 4% a little less). None would expect to stop using

³ Note that these impact figures presume 100% awareness of the BBC Local Video service. Lower levels of awareness are likely to reduce the impact on each type of local media.

⁴ Other types of website are defined as non-newspaper/non-commercial radio station websites

⁵ Figures are subject to data rounding.

The introduction of the BBC Local Video service is likely to have a marked increase on the proportion of people using the BBC Local website as a source for local news stories

As an additional exercise, to further assess the likely impact of the BBC Local Video service, all survey respondents were asked which sources of local news they would use for 'local news stories' both now and after the introduction of the BBC Local Video concept.

Both with and without the BBC Local Video service being available, television is the preferred source for 'local news stories':

- Fifty-nine percent would choose ITV regional news now, fifty-five percent if the local video service was available
- Forty-five percent would choose BBC regional news now, forty-four percent if the local video service was available

The launch of a local video service would likely result in a marked increase in the proportion of people who would choose the BBC Local website as a source for local news stories:

- Six percent said they would choose the BBC Local website now, rising to thirty-one percent if the local video service was available. This represents a move from eighth⁶ most likely to be chosen media source to the third (after ITV and BBC regional TV news)

Results show that if the local video service was available, the proportion of people who would choose commercial radio or daily paid for newspapers for 'local news stories' would drop marginally:

- Twenty-eight percent would choose local commercial radio now, twenty-four percent if the BBC local video service was available
- Twenty-four percent would choose daily paid for newspapers now, twenty-one percent if the BBC local video service was available

The results also show that the availability of the BBC Local Video service would have little impact on the likelihood that existing online sources of local news would be chosen to access 'local news stories'.

- Six percent would choose local newspaper websites now, six percent if the BBC Local Video service was available
- Seven percent would choose other websites with local news now, six percent if the BBC Local Video service was available⁷

⁶ Ranked in joint eight position along with newspaper websites collectively.

⁷ Other types of website are defined as non-newspaper and non-commercial radio station websites

2 INTRODUCTION TO THE MAIN REPORT

2.1 BACKGROUND TO THE MIA

The BBC has proposed the launch of an on-demand local video service delivered via both fixed and mobile internet Protocol broadband networks within the UK.

The Government's White Paper on the BBC Charter Review requires that any new or proposed significant change to a BBC service is subject to a Public Value Test ("PVT") – a study that measures "the 'public value' of the proposed changes against its impact on the market, including both commercial and not-for-profit concerns". The proposed launch of a Local Video service from the BBC is to be subject to a Public Value Test.

In essence, a Public Value Test determines whether the introduction of a new or substantially changed BBC service is in the public's interest.

PVT's have three component elements that must be conducted:

1. The Public Value Assessment ("PVA"), assigned to the BBC Trust, determines whether the service satisfies some criteria (fit with BBC purposes, quality and distinctiveness) and whether it generates enough "public value" to justify its cost in terms of license fee funds
2. The Market Impact Assessment ("MIA"), assigned to Ofcom, estimates the other costs and benefits due to the introduction of the service, e.g. crowding out of services offered by commercial operators, positive or negative impact on their investment and innovation incentives. The MIA, estimates the other costs and benefits due to the introduction of the service. When relevant and feasible, the MIA will provide a quantifiable appraisal of the impact of a new service on consumers, producers, advertisers and other participants in related markets. It will comprise a list of likely "costs" and "benefits" and attempt to compare them to assess the overall impact
3. The Public Value Test then combines the public value and market impact estimated by the PVA and the MIA to determine the overall "net value" of the service

Primary market research was conducted with the potential audience for the Local Video service, to provide data and evidence to support Ofcom's MIA. Following a competitive invitation to tender, Ofcom commissioned SPA, an independent research agency, to conduct research and analysis to form part of the evidence required to assess the market response and likely impact of the proposed BBC Local Video service. This report details the findings from this primary market research study.

2.2 ABOUT THE BBC LOCAL VIDEO SERVICE

The proposed BBC Local Video service would be an on-demand, Local Video service delivered via both fixed and mobile broadband networks.

Specifically, the service would focus on providing online video for the following types of local news media⁸:

- Local news
- Local sport
- Local weather
- Other local content linked to BBC linear content⁹

This content would be free at the point of use (without advertising) and available across the whole of the UK. It would be made available as individual items and in bulletin form for each area.

The BBC has proposed that this service would be made available on-demand via bbc.co.uk and, where appropriate, on fixed and mobile broadband networks. The proposal does not include distribution via TV platforms including DTT or digital Satellite.

Local areas to be covered by the BBC Local Video service

The online offer would largely be based on existing BBC local radio and the 'BBC Local' website content. The content would be tailored for the 60 regions shown in the table below:

ENGLAND			SCOTLAND
Beds/Herts	Gloucester	Norfolk	Highlands & Islands
Berkshire	Guernsey	Northampton	North East Scotland
Birmingham	Hampshire (Solent)	Nottingham	Tayside & Central Scotland
Black Country	Hereford and Worcester	Oxford	Glasgow & West of Scotland
Bradford and West Yorkshire	Humberside (Hull)	Sheffield	Edinburgh & East of Scotland
Bristol	Isle Of Man	Shropshire	South Scotland
Buckinghamshire	Jersey	Somerset	WALES
Cambridgeshire	Kent	Staffordshire (Stoke)	North-West Wales
Cheshire	Lancashire	Suffolk	North-East Wales
Cornwall	Leeds	Surrey	Mid Wales
Coventry and Warwickshire	Leicester	Sussex	South-West Wales
Cumbria	Lincolnshire	Teeside	South-East Wales.
Derby	London	Wear	NORTHERN IRELAND
Devon	Manchester	Wiltshire	Foyle & West
Dorset	Merseyside	North Yorkshire	Belfast & East
Essex	Newcastle		

⁸ Local travel, was mentioned in the explanatory video clip provided by BMRB from the research undertaken for BBC Management, and as an option on the research questionnaire to allow consistent comparison of the findings.

⁹ Other local content: Content linked to or deriving from other linear BBC content built around key genres like nature/outdoors, heritage/history and culture and that which celebrates local heroes, events and the community

Volume of BBC Local Video service content

At most, the BBC says it would offer up to the following, each day, in each of the 60 local areas:

- Ten new local news or sports stories
- Three new local news, weather and sport bulletins

This content would be produced in addition to stories already made for networks, nations and regional news bulletins that are currently available on bbc.co.uk. The BBC seeks to be able to exercise some discretion as to the proposed daily number of stories in exceptional circumstances, such as at times of local or national crisis or during events of major importance.

Described to survey respondents:

On average, up to 10 new local video stories a day will be filmed in your local area, adding up to no more than an average of 20 minutes per day. Overall, these stories will focus predominantly on news and sport. There will also be three short daily bulletins for each of news, weather and sport.

2.3 RESEARCH OBJECTIVES

The primary objective of the market research was to assess the take-up of the proposed BBC Local Video service and its impact on the current market for local media in the UK.

Specifically, the market research was designed to provide the following information:

1. The current usage of existing local media sources amongst both broadband and non-broadband users;
2. An assessment of the local media services and channels used, types of information accessed and local media audience profiles;
3. The likely take-up of the proposed BBC Local video service and the impact on existing consumption of existing local media sources including:
 - Local newspapers
 - Local commercial radio
 - ITV regional TV news
 - Local news & information websites
 - Local TV
4. Demographically profile and define the people who are likely or unlikely to use and be impacted by the BBC Local Video on demand service; and
5. Provide a robust database amongst current broadband users to investigate the plausibility of creating a socio-demographic model to predict the likely take-up and impact of the local video service at a regional or area level.

3 METHODOLOGY

3.1 SURVEY METHODOLOGY

Main survey

SPA conducted a total of 2,373¹⁰ interviews across the UK, among those with and without broadband in the home currently. Interviews were conducted in the home, face-to-face with a pen and paper questionnaire. A short video illustration and explanation of the proposed service was shown to participants on a video PDA.

Interviews were between 25 and 35 minutes in length, and conducted between 2 June and 6 July 2008, at a total of 168 distinct locations (sampling points). An average of 14 interviews per location were completed, with at least one location in each of the 60 regions in which the BBC proposes to offer a local video service.

Omnibus survey

To ensure that the research would be representative of the UK when conducting analysis at an overall level, from both a demographic and media consumption perspective, a number of key media consumption questions from the main survey were also placed on a nationally representative omnibus survey. This data was used when reporting at a total level and to weight the main survey data where relevant.¹¹

In total, 2,008 people representative of the British population aged 15+ were surveyed using an in-home face-to-face CAPI approach. Interviews were conducted between the 19th and 24th August 2008.

3.2 MAIN SURVEY QUESTIONNAIRE STRUCTURE

The main survey questionnaire took approximately 30 minutes to administer and followed the structure outlined below:

- Section A: General media consumption
- Section B: Current consumption of local media
- Section C: BBC media consumption and attitudes towards local media
- Introduction to the Local Video concept via a 3 minute video and summary description
- Section D: Reactions to and impact of BBC Local Video Service
- Section E: Demographics and profiling

The respondent experience of the survey differed depending on current local media consumption and the extent of interest in the BBC local video service. Further questions were asked of those who use specific local media sources and those who were likely to use the BBC local video service.

¹⁰ This figure includes 2,195 main survey interviews plus 178 booster interviews with niche local media consumers. The main survey results are based on 2,195 interviews.

¹¹ Data weighting is detailed in section 8.1 of this report.

4 LOCAL MEDIA CONSUMPTION

4.1 LOCAL MEDIA CONTENT TYPES CONSUMED

More than nine in ten people in the UK consume local media monthly, with local news stories and weather the most popular types of content

Figure 4.1_1 shows the proportion that access each type of local content at least monthly at a total level and amongst those with and without broadband access at home.

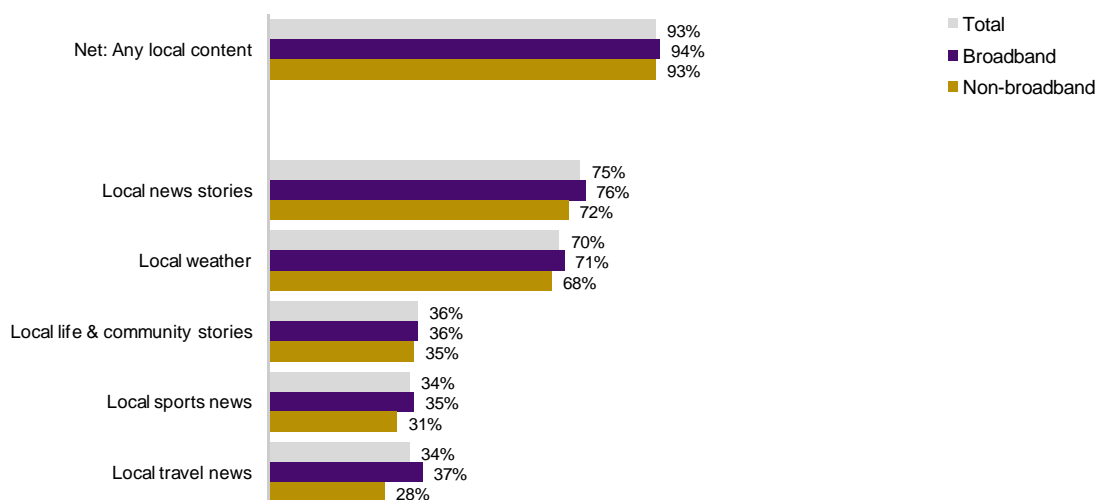
In total, more than nine in ten people in the UK currently access local news content of some type. The proportion accessing local news overall is not significantly different when comparing those people with broadband at home with those without access.

'Local news stories' are the most popular type of local content, accessed by three-quarters of the population. However, 'local weather coverage' is only marginally less popular, accessed by seven in ten people.

Other forms of local media coverage are significantly less popular, with 'local life and community stories', 'local sport news' and 'local travel news' each respectively accessed by just over one-third of the population.

Noticeably, those with broadband at home show greater interest in 'local travel news' than those without access (37% vs. 28%). This finding reflects the fact that people with broadband internet access at home are more likely to be working than those without access.

Figure 4.1_1, Types of local content consumed at least monthly



QB1a. Which of the following types of local media content, if any, do you read, watch or listen to at least monthly?
Base: Total (2,088), All with broadband at home (1,271), All without broadband at home (817)
Source: Ofcom research, carried out by SPA in June-August 2008, omnibus survey data

4.2 METHODS USED TO CONSUME LOCAL MEDIA

Local newspapers and regional TV are the most popular methods used to access local media content. One-quarter of those with broadband access local content online

The proportion accessing local news content weekly via the main potential methods of access are shown in Figure 4.2_1.

Local newspapers and regional TV news are equally popular sources of local media, with around seven in ten respectively using each as a source of local media content.

Amongst those without broadband at home, the proportion watching ITV regional news at least weekly is marginally higher than weekly viewing amongst those with broadband at home (73% vs. 68%).

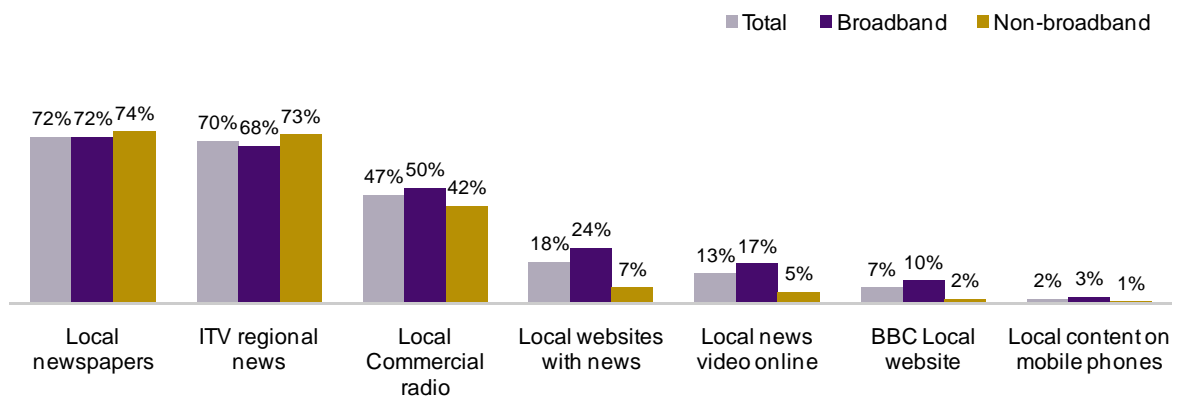
Commercial radio is listened to by just under half of the population (47%). The proportion who listen to commercial radio is marginally higher amongst those with broadband internet access at home (50%) than amongst those without access (42%).

Just under one quarter (24%) of those with broadband claim to visit websites with local news at least weekly:

- Seventeen percent of those with broadband claim to watch video clips of local content online each week
- The BBC Local website is accessed by ten percent of those with broadband on a weekly basis

Accessing local content via mobile phone is very limited, with claimed weekly usage in the population at two percent (1 in 50 people).

Figure 4.2_1, Weekly use of local media by type – Summary



QB1B. On average, how often do you do each of the following...?

Base: Omnibus survey - Total (2,088), All with broadband at home (1,271), All without broadband at home (817)
 Source: Ofcom research, carried out by SPA in June-August 2008, omnibus survey data and main survey data¹²

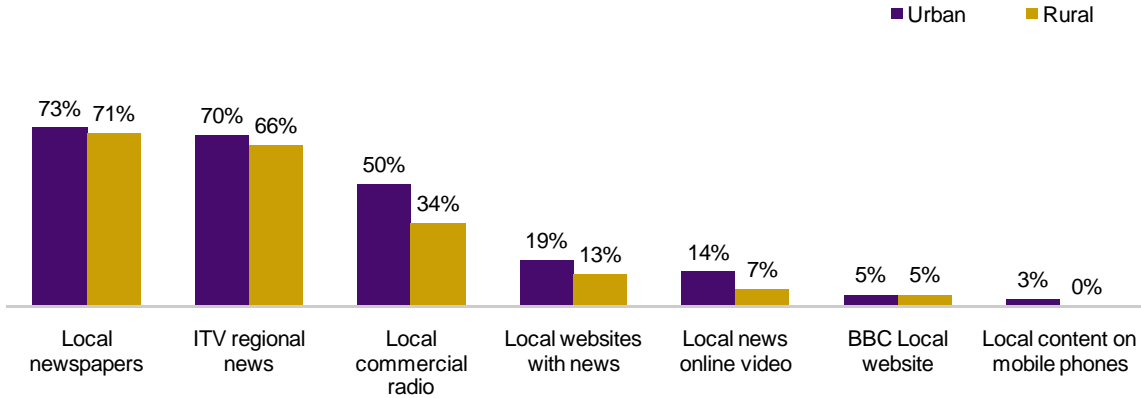
¹² BBC Local website figure from QB4a main survey data.

Figure 4.2_2 shows the proportion in urban and rural locations accessing local news weekly via each method of access.

Results show some local media sources are more likely to be used in urban locations than in rural areas:

- Local commercial radio (50% urban vs. 34% rural)
- Local websites (19% urban vs. 13% rural)
- Local online video (14% urban vs. 7% rural)

Figure 4.2_2, Weekly usage of local media by type – Total rural vs. Total urban



QB1B. On average, how often do you do each of the following...?
 Base: Urban (1,692), Rural (382)
 Source: Ofcom research, carried out by SPA in June-August 2008, omnibus survey data

Figure 4.2_3 shows the proportion of the population who read each of the different possible types of local newspapers at least weekly.

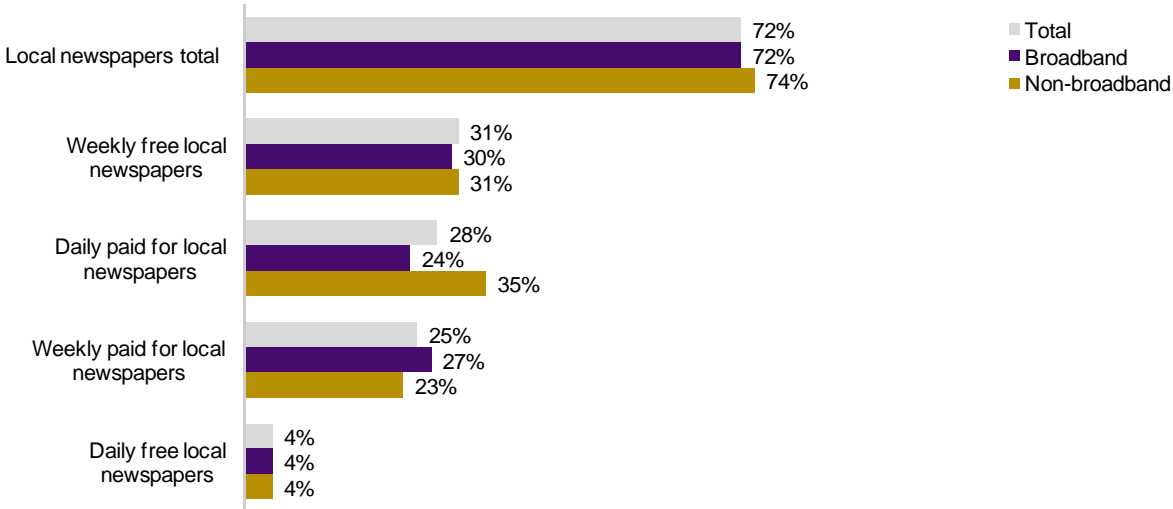
Free weekly newspapers are the most popular paper type read each week by the UK population, read by just under one-third (31%).

Daily paid for newspapers (28% read at least weekly) and weekly paid for newspapers (25% read at least weekly) are only marginally less popular.

Daily paid for newspapers are notably more popular amongst those without broadband at home (35%) than those with (24%). The older age profile of both the non-broadband population and readers of daily paid for newspapers is the likely explanation for this finding.

Daily free local newspapers are the least popular format of local paper, read by just one in twenty-five people each week (4%).

Figure 4.2_3, Types of newspapers read in a typical week – Summary



QB3A. Which local newspapers do you read in a typical week?
 Base: Total (2,195), All with broadband at home (1,625), All without broadband at home (570)¹³
 Source: Ofcom research, carried out by SPA in June-August 2008, omnibus survey data and main survey data¹⁴

Figure 4.2_4 shows proportion of the population overall and the broadband population who access each type of website for local content in a typical week.

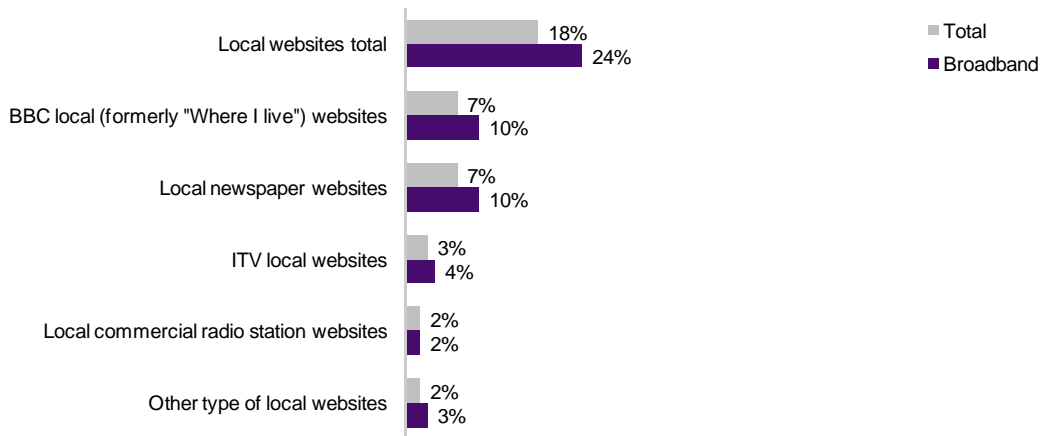
The BBC Local website is the most popular single website for local news, viewed by seven percent overall and one in ten with broadband access at home. This makes the BBC Local website more than twice as popular as the ITV Local website amongst those with broadband at home (10% vs. 4%).

Collectively, local newspaper websites are accessed weekly by one in ten people with broadband internet access at home.

Commercial radio station website usage is limited, with just one person in fifty with broadband access (2%) currently visiting this type of site weekly.

¹³ Figures are rebased on the total population. Question originally asked of weekly local newspaper readers.
¹⁴ Total figures are from the omnibus survey. Main survey data at a total level is weighted to match the omnibus survey findings. Results for specific newspaper type are taken from the main survey data.

Figure 4.2_4, Types of local websites accessed in a typical week



QB5A. Which of the following types of local website do you access in a typical week?

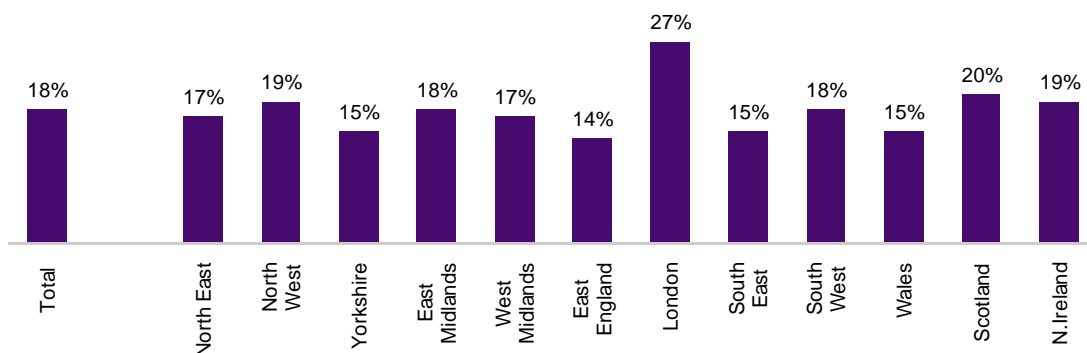
Base: Total (2,088 omnibus survey, 2,195 main survey) All with broadband at home (1,625 main survey, 1,271 omnibus survey)

Source: Ofcom research, carried out by SPA in June-August 2008, omnibus and main survey data¹⁵

Figure 4.2_5 shows the proportion of the population who visit websites with local news on a weekly basis by Government Office region and Nations.

For most Government Office regions, the proportion who visit websites with local news is not significantly different from the UK average. The exception to this is London, which stands out as a markedly different, with more than one-quarter (27%) accessing websites with local news in a typical week.

Figure 4.2_5, Visiting websites with local news weekly by region



QB1B. On average, how often do you visit websites with local news? Net: Weekly

Base: Total sample (2,088)

Source: Ofcom research, carried out by SPA in June-August 2008, omnibus and main survey data¹⁶

¹⁵ 'Local websites total' figure and BBC local figure taken from the omnibus survey, other figures are from the main survey data.

¹⁶ Northern Ireland figures are taken from the main survey data.

4.3 TYPE OF LOCAL CONTENT CONSUMED BY ACCESS METHOD

'Local news stories' are the most popular type of local content accessed by users of each media source

Figure 4.3_1 shows the type of local content consumed via each local media source by weekly users of each media source.

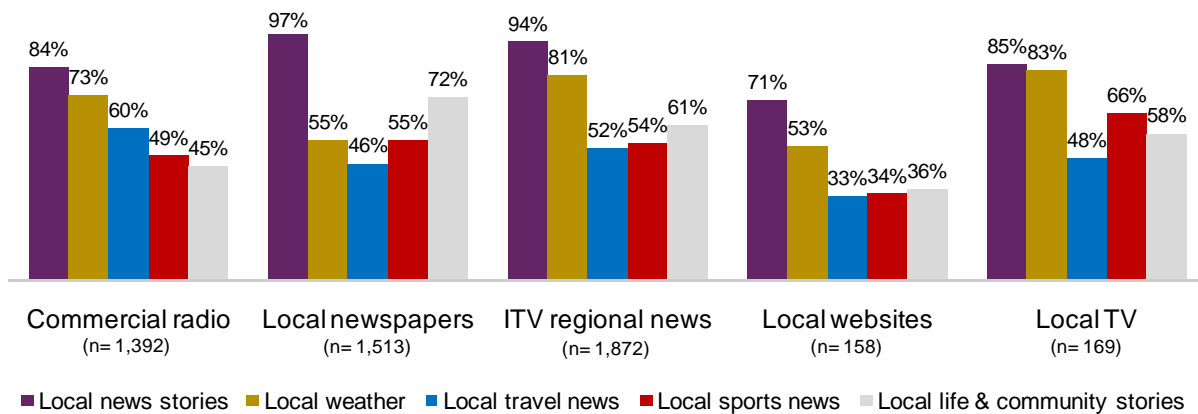
Across all media sources 'local news stories' are the most popular type of local content consumed by the users of each media . However, it is notable that the proportion of weekly local website users accessing local news stories (71%) via this method is distinctly lower when compared to other media sources.

Weather is significantly more likely to be accessed by users of local TV and radio than by readers of local newspapers or visitors to local websites with local content the internet¹⁷.

'Local life and community stories' are most likely to be accessed by readers of local newspapers (via this method), it was mentioned by almost three-quarters (72%).

Local travel news is the least popular local content type for all media sources except amongst local commercial radio listeners for whom it is ranked third (via this method).

Figure 4.3_1, Type of local content accessed via each media by users



QB2C/B3C/B4B/B5C/B7C Which of the following types of local content do you [access] in a typical week via [media type]?

Base: All who use each type of media weekly/use monthly for local TV (in brackets)

Source: Ofcom research, fieldwork carried out by SPA in June 2008, main survey data

¹⁷ Figures are based on access via each respective source.

4.4 FREQUENCY OF LOCAL MEDIA CONSUMPTION

ITV regional news and commercial radio stations are the local media sources most likely to be used daily

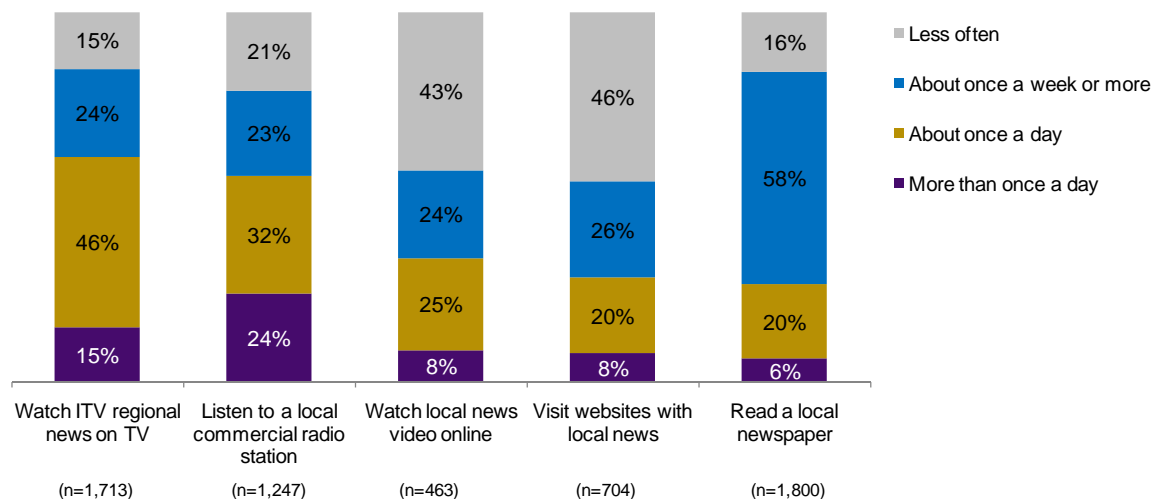
Figure 4.4_1 shows the frequency that each source of local content is accessed amongst those who ever use each method.

The broadcast media sources analysed, ITV regional news and commercial radio, are the methods most likely to be used to consume local media daily, with more than half of users accessing each respectively on a daily basis.

In contrast, those who visit local websites or watch local videos online use these services less frequently:

- More than one-quarter (28%) of visitors to websites with local content visit weekly
- Around one-third (32%) of viewers of online local videos view weekly

Figure 4.4_1, Frequency of using local media by users of each medium



QB1B. On average, how often do you do each of the following...?

Base: All who ever use each type of local media (in brackets)¹⁸

Source: Ofcom research, carried out by SPA in June-August 2008, omnibus survey data

¹⁸ Results rebased on those who ever use each media source. Original question was asked of all respondents.

4.5 TIME SPENT ACCESSING LOCAL MEDIA

With the exception of commercial radio, the majority spend less than half an hour each day consuming local content via any given media type

Figure 4.5_1 shows the time spent using each local news source by weekly users of each source.

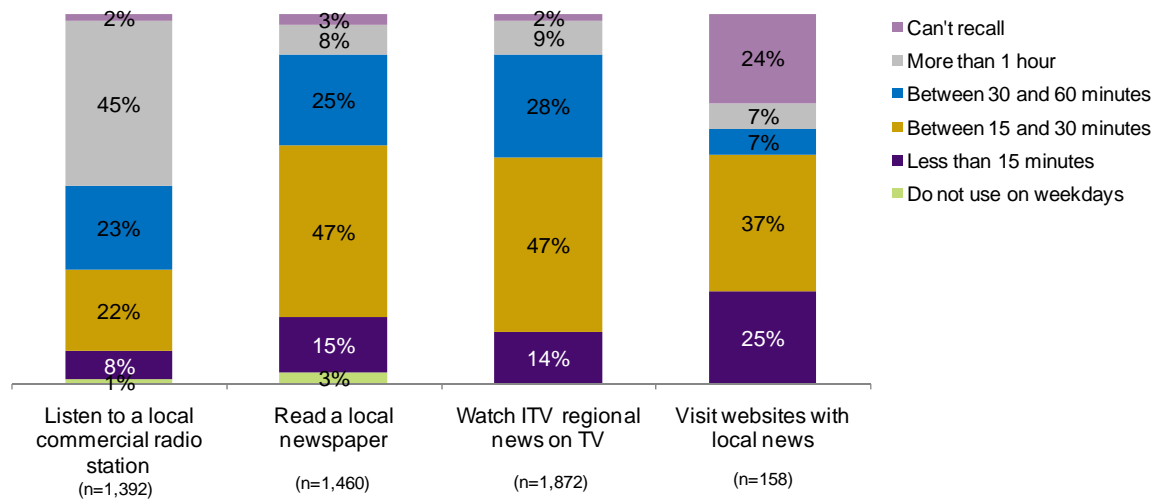
Local commercial radio is the local media type that its users spend the most time consuming in a typical weekday - forty-five percent of users listen for more than one hour a day.

Respectively, the majority of those who read local newspapers, watch ITV regional news and those who visit local websites each spend less than half an hour using each of these types local media.

On average, amongst those who can recall, the average time spent using each type of media on weekdays are as follows¹⁹:

- Local commercial radio station – 74 minutes
- Local newspaper – 32 minutes
- ITV regional news – 35 minutes
- Websites with local news – 28 minutes

Figure 4.5_1, Time spent using services amongst weekly users on an average weekday



QB2B/B3B/B4A/B5F/B7A. How much time do you spend watching / reading / visiting each media on an average weekday

Base: All who use each type of local media weekly (in brackets), main survey data

Source: Ofcom research, fieldwork carried out by SPA in June 2008

¹⁹ Based on a derived average - 'Less than 15 minutes'=7.5, 'Between 15 and 30 minutes'=22.5, 'Between 30 and 60 minutes'=45, 'Between 1 and 2 hours'=90, 'More than 2 hours'=150

4.6 PREFERRED SOURCES OF LOCAL MEDIA

The internet is not currently a primary source that would be chosen for local news coverage, with broadcast media and newspapers significantly more likely to be used

All survey respondents were asked which sources of local media they would be most likely to choose to access different types of local news content. Figure 4.6_1 shows which source people would use first and in total when wanting to access 'local news stories'.

Television is clearly the preferred source for local news stories amongst the UK population:

- ITV regional news is the source most likely to be chosen both overall and as a first choice for local news stories. Almost one-third would select ITV regional news first and three in five (59%) would use it as a source overall
- BBC regional news is the second most popular source for local news stories, with forty-five percent mentioning it as a source they would choose. In contrast to ITV regional news, BBC regional news is significantly less likely to be the first choice for local news stories (31% vs. 13%)

Twelve percent would choose local commercial radio first for local news stories (chosen by 12%), while more than one-quarter would chose this method overall (28%).

One in five or more would choose each type of local newspaper to access 'local news stories':

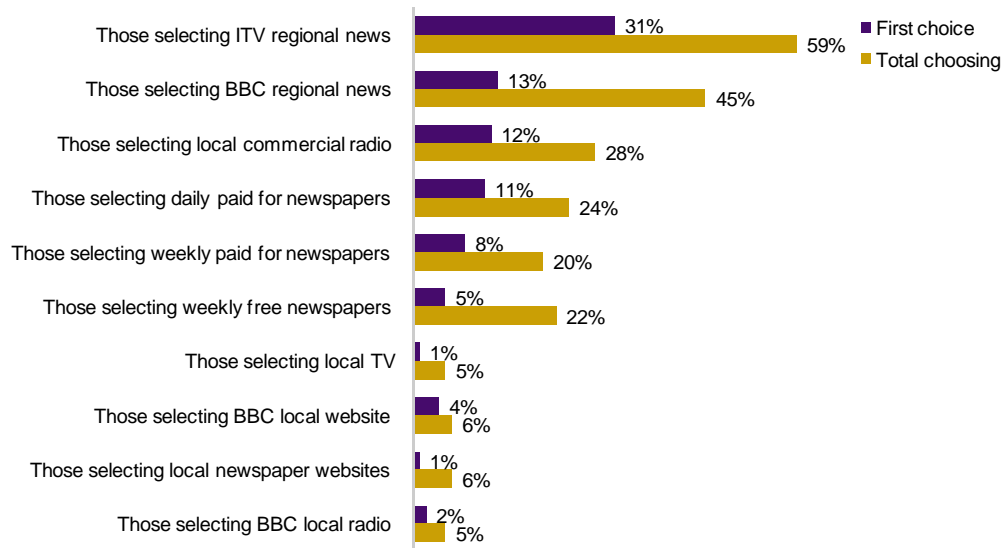
- Paid for daily local newspapers are likely to be chosen first as a source for local news stories by around one in ten (11%) and by almost one quarter overall (24%)
- Paid for weekly local newspapers are likely to be chosen first as a source for local news stories by eight percent and by one in five overall (20%)
- Free weekly local newspapers are likely to be chosen first as a source for local news stories by around one in twenty (5%) and twenty-two percent overall

A comparatively small proportion said that they would use online sources of information for local news stories:

- Six percent said they would go to the BBC Local website, with four percent saying it would be their first source
- Just six percent said they would use a newspaper website and only one percent would use this as their first source
- No one cited commercial radio station websites as a source they would use for local news stories

Mobile phones were included as a potential source but were chosen by less than one percent of the population overall.

Figure 4.6_1, Sources that are most likely to be used for ‘Local news stories’²⁰



QB8A Which of the following would likely be your first source of new information from each of the following categories of local content? ‘Local news stories’

QB8B Which of the following would you also possibly use as sources of new information from each of the following categories of local content?

Base: Total sample (2,195)

Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

4.7 ATTITUDES TOWARDS LOCAL NEWS COVERAGE

Attitudes confirm the perceived importance of local news to the population and also that a sizeable proportion would like greater levels of local news coverage

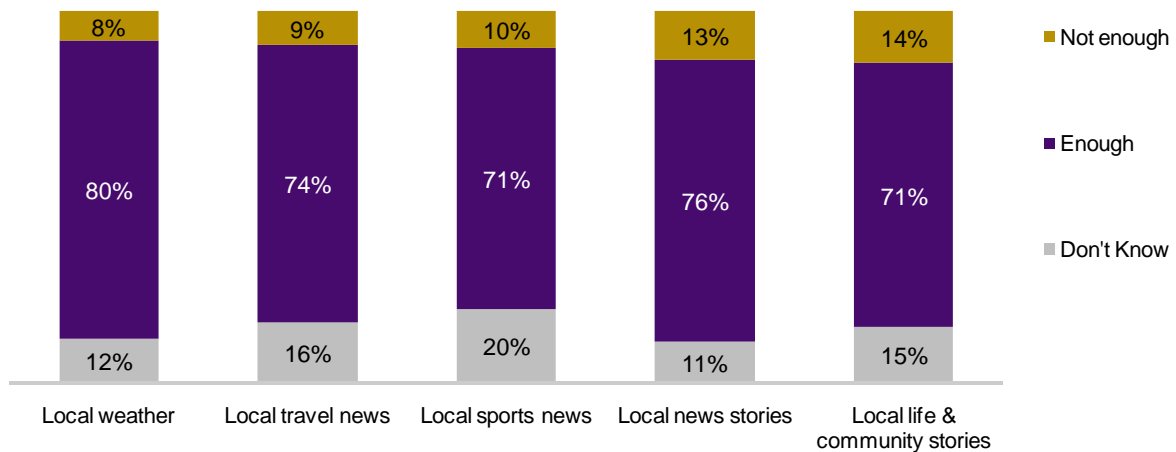
Figure 4.7_1 shows the attitudes towards the current levels of coverage of different types of local news.

For each type of local news coverage a large majority of the population believed there to be ‘enough’ coverage currently – more than seven in ten for each local news type.

‘Local news stories’ (13% ‘Not enough’) and ‘Local life and community stories’ (14% ‘Not enough’) were the types of news most likely to be mentioned as not having enough coverage at present.

²⁰ Excludes responses chosen by less than 5% overall.

Figure 4.7_1, Perceptions of current levels of local news coverage - Total



QC4. For each of the following types of local content, would you say that the current level of news and information available in the media is enough, or not enough?

Base: Total (2,195)

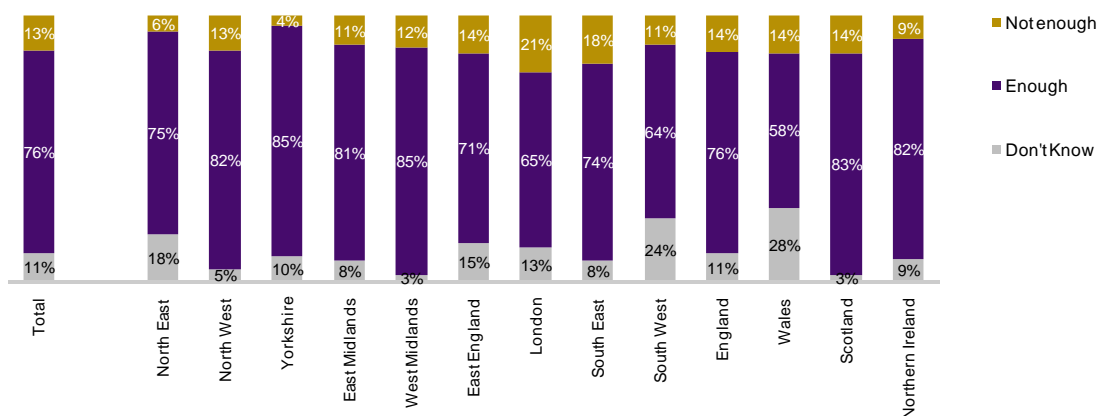
Source: Ofcom research, carried out in June-August 2008, main survey data

Figure 4.7_2 shows the perceptions of the level of coverage of 'local news stories' currently available in the media by region.

Results show some marked differences in attitudes towards coverage levels in some regions:

- More than one in five in London believe there is not enough local news story coverage (21% 'not enough')
- Those in Yorkshire (4% 'not enough') and the North East (6% 'not enough') are less likely than average to say there is 'not enough' coverage of 'local news stories'

Figure 4.7_2, Perceptions of coverage of 'local news stories' by region - Total



QC4. For each of the following types of local content, would you say that the current level of news and information available in the media is enough, or not enough?

Base: Total sample (2,195)

Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

Figure 4.7_3 shows the UK public's attitudes towards a number of statements relating to local news coverage.

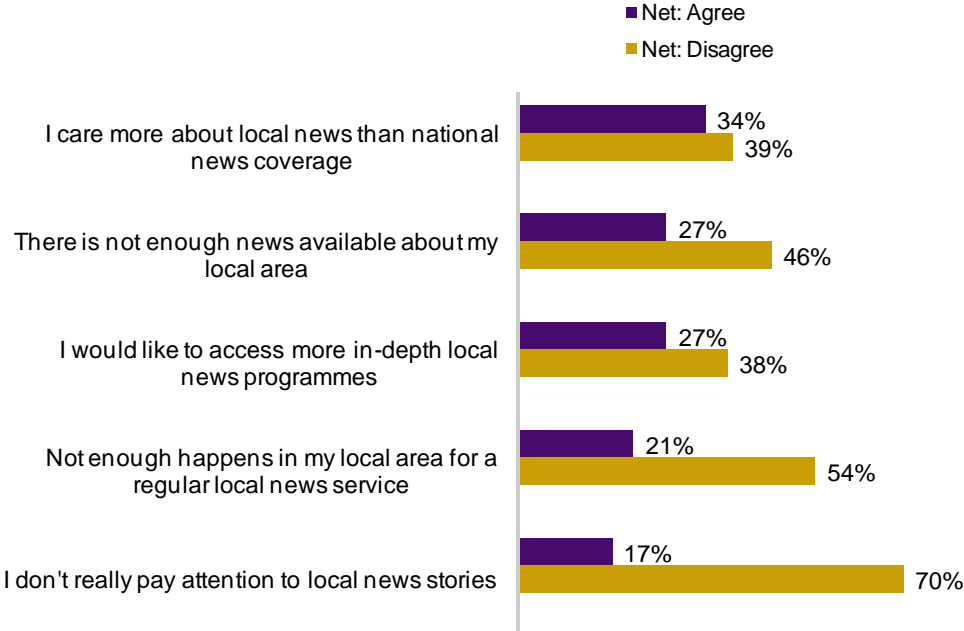
Further highlighting the interest in local news coverage, less than one in five agreed that 'I don't really pay attention to local news stories' (17% Agree) and just one in five agreed that 'Not enough happens in my local area for a regular local news service' (21% Agree).

Agreement levels with two specific statements indicate that more than one quarter of the UK population show demand for greater levels of local news stories:

- 'There is not enough news available about my local area' (27% Agree)
- 'I would like to access more in-depth local news programmes' (27% Agree)

Results indicate that opinions are split when comparing how much the population cares about local news coverage compared to national news coverage. Similar proportions agreed and disagreed that 'I care more about local news than national news coverage' (34% Agreed vs. 39% Disagreed).

Figure 4.7_3, Attitudes towards local news - Total



QC5. Please tell me to what extent you agree or disagree with each statement.²¹
 Base: Total (2,195)
 Source: Ofcom research, carried out in June-August 2008, main survey data

4.8 IMPACT OF BROADBAND ACCESS ON LOCAL MEDIA CONSUMPTION

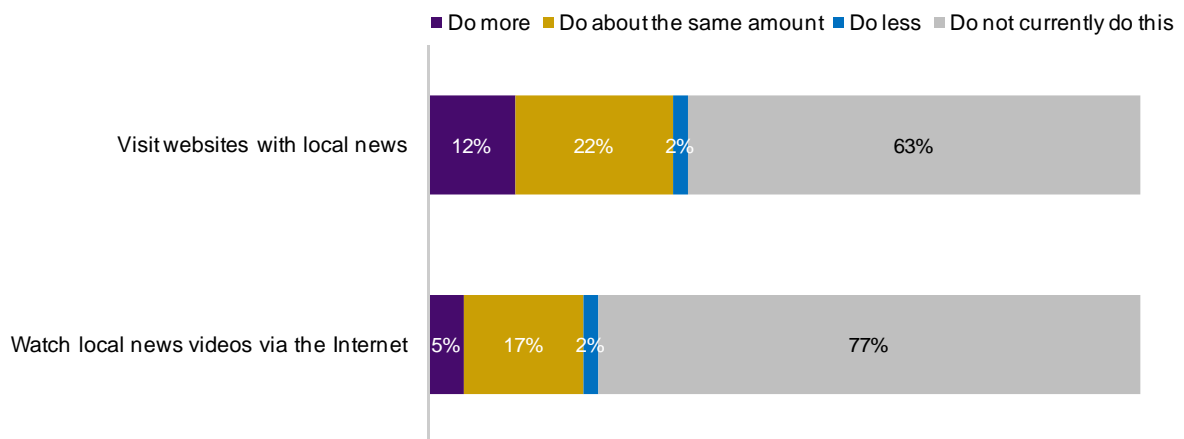
More than one in ten of those who have taken up broadband in the last 2 years said they visit websites with local news more often since getting their connection

Figure 4.8_1 shows the impact of taking-up broadband access at home on the consumption of online methods of accessing local news.

While for the majority, getting access to broadband in the home has had no impact on the likelihood of consuming local media online, a small minority are more likely to access local content online:

- Twelve percent say they visit websites with local news more since getting broadband
- Five percent say they watch local news videos more since getting broadband

Figure 4.8_1, Impact of broadband access on local media consumption amongst those with broadband at home for less than 2 years



QB1C Since you have had broadband internet access at home, would you say you do each of the following more, less, or about the same amount as previously?

Base: All who have had broadband access for less than 2 years (425)

Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

4.9 GENERAL MEDIA USE VIA BROADBAND AND MOBILE

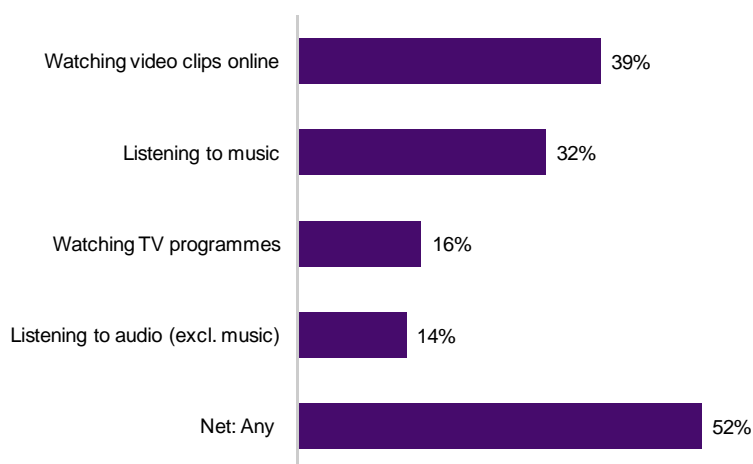
Currently two in five broadband users claim to watch video clips online but watching video clips via mobile is very limited

Figure 4.9_1 shows the media accessed via the internet in general amongst those people with broadband internet access at home. Note that these figures do not relate to 'local' content but all types of content.

Half of those with broadband access any type of audio/visual content via the internet (52%), with video clips the most popular form of content (39%). Specifically, sixteen percent said they were accessing TV programmes online.

Music is also popular amongst those with broadband access, with approximately one-third (32%) saying they currently listen online. Spoken content is less popular, with non-music audio being listened to by less than half the proportion who listen to music (14%).

Figure 4.9_1, General media accessed via broadband internet



QA5b. Which of the following, if any, do you ever use the internet for?

Base: All with Broadband at home (1,625)

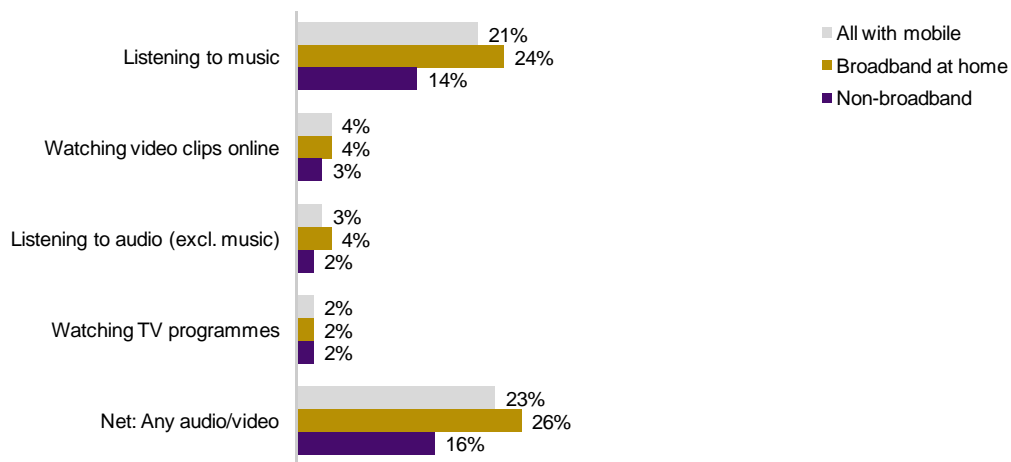
Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

Figure 4.9_2 shows the general media types that are accessed via mobile phone at a total level and also amongst those with and without broadband access. Those people who have broadband access at home are more likely to use their mobile phone for audio/visual media (26% vs. 16%).

In total, just under one-quarter access audio/visual content on their mobile (23%), with listening to music representing the bulk of media consumed.

Watching video clips and TV programmes via mobile phone is currently a niche activity, with just one in twenty-five mobile users (4%) currently watching video clips and only one in fifty (2%) watching TV programmes.

Figure 4.9_2, General media accessed via mobile phone



QA5a. Which, if any, do you do with your mobile phone?

Base: All with a mobile phone – Total (1,928), Broadband at home (1,499), All without broadband at home (429)

Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

5 TAKE-UP OF THE LOCAL VIDEO SERVICE

5.1 EXPECTED USE OF BBC LOCAL VIDEO SERVICE²²

Approaching half of those with broadband access at home say they would use the BBC Local Video service ('probably'/'definitely') if it was available for their local area

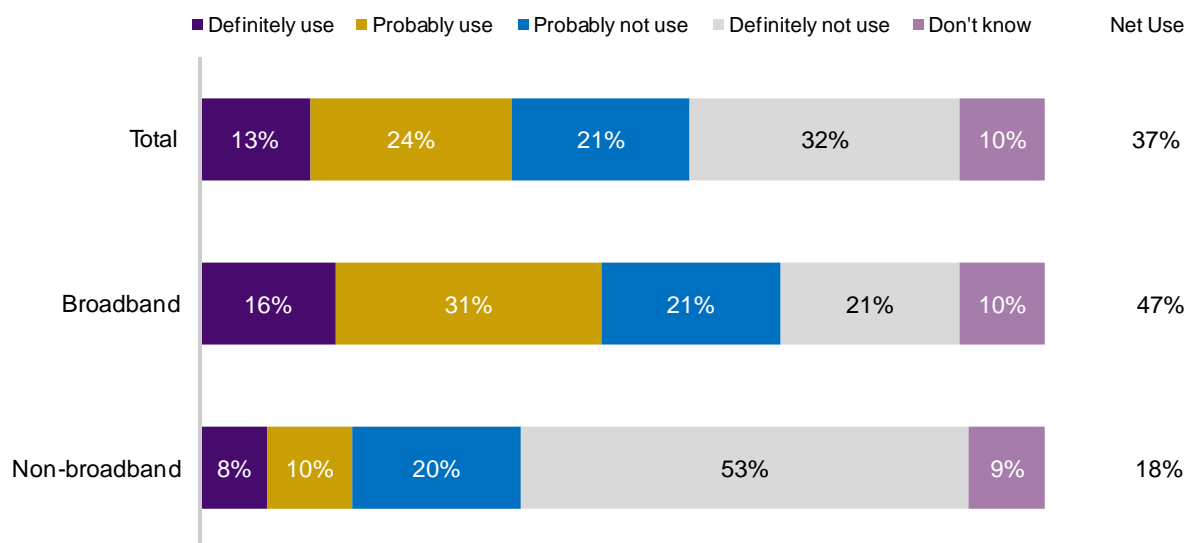
Figure 5.1_1 shows the expected take-up of the BBC Local Video service at a total level and amongst both those with and without broadband at home.

Amongst the population with broadband at home, almost half (47%) say they are likely to take-up the service. Approximately one third of those who are interested in using the service (16% overall), say they would 'definitely use' the service if it was available.

Amongst those without broadband at home, likely take-up is expectedly lower, with just 18% saying they are likely to use the service. Amongst this group, half the proportion of those with broadband at home say they would 'definitely use' the service (8%).

One in ten does not know whether or not they would use the service. This level of uncertainty is not unusual for a service concept that has yet to be launched to the public.

Figure 5.1_1, Likelihood to take-up BBC Local Video Service



QD1 Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [LOCAL AREA]? Would you...

Base: Total (2,195), All with broadband at home (1,625), All without broadband at home (570)

Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

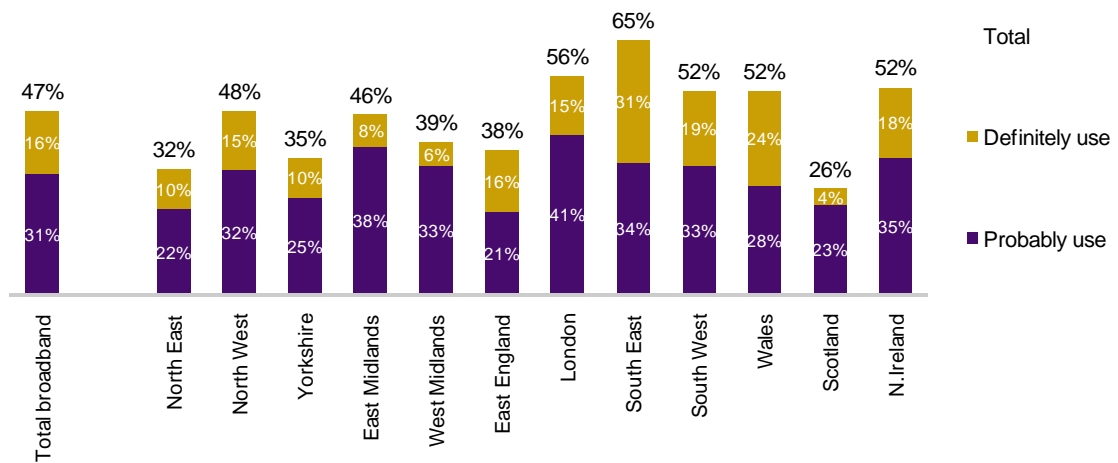
²² Considerations relating to researching the likely take of the BBC Local Video service are detailed in section 8.2 of this report.

Figure 5.1_2 shows the expected take-up amongst those with broadband at home by Government Office region.

The intention to use the BBC Local Video service differs markedly by region:

- In South East and London are significantly more likely to say they would use the BBC Local Video service
- Those in Scotland, the North East and Yorkshire are significantly less likely to say they would use the BBC Local Video service

Figure 5.1_2, Likelihood to take-up BBC Local Video Service, by region amongst those with broadband at home



QD1 Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [LOCAL AREA]? Would you...

Base: All with broadband at home (1,625), main survey data

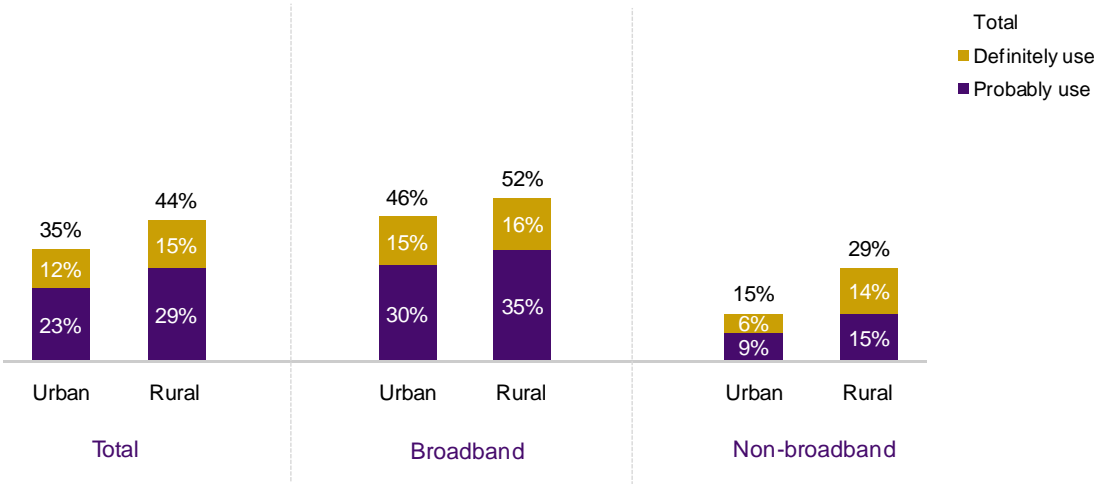
Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

Figure 5.1_3 shows the expected take-up of the BBC Local Video service in both rural and urban locations.

Those who live in rural areas are significantly more likely to use the Local Video service than those in urban areas (44% vs. 35% 'definitely'/'probably use'). Amongst people in rural areas, with broadband at home, more than half (52% 'definitely'/'probably use') say they would use the service.

Those without broadband at home, who live in rural areas, are twice as likely to take-up the service as those in urban areas (29% vs. 15% 'definitely'/'probably use').

Figure 5.1_3, Likelihood to take-up BBC Local Video Service, by location type



QD1 Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [LOCAL AREA]? Would you...
 Base: Total – Rural (473), Urban (1,722), All with broadband at home – Rural (357), Urban (1,268), All without broadband at home – Rural (116), Urban (454)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

Figure 5.1_4 shows the expected take-up of the BBC Local Video service amongst those with broadband at home by current local media sources used.

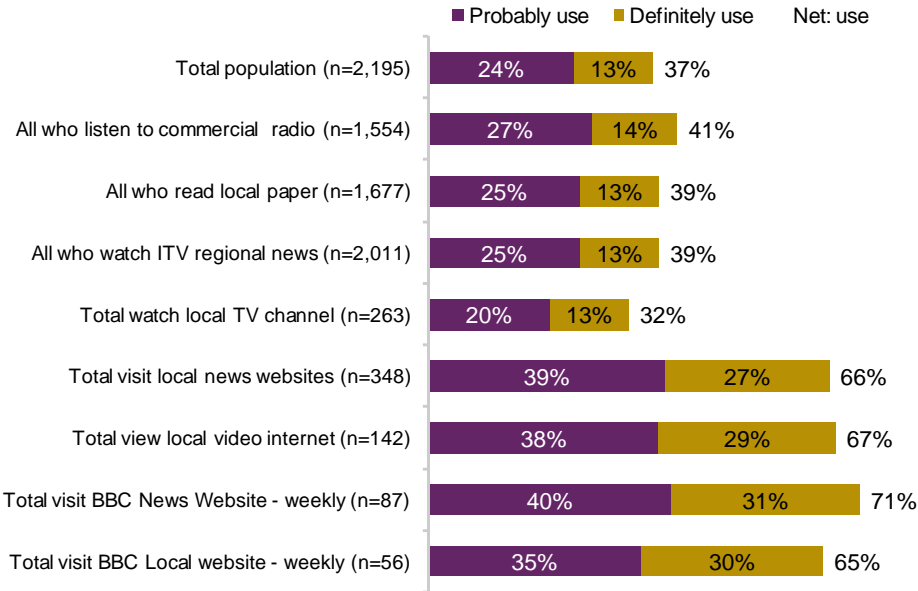
Results show a clear correlation between take-up of the BBC Local Video service and existing consumption of local content via the internet:

- Viewers of online local video content (29% 'Definitely use')
- Local newspaper website visitors (27% 'Definitely use')

Furthermore, those people who currently use BBC sources for news online are significantly more likely to use the service:

- BBC news website users (31% 'Definitely use')
- BBC local website users (30% 'Definitely use')

Figure 5.1_4, Take-up amongst users of existing local media sources



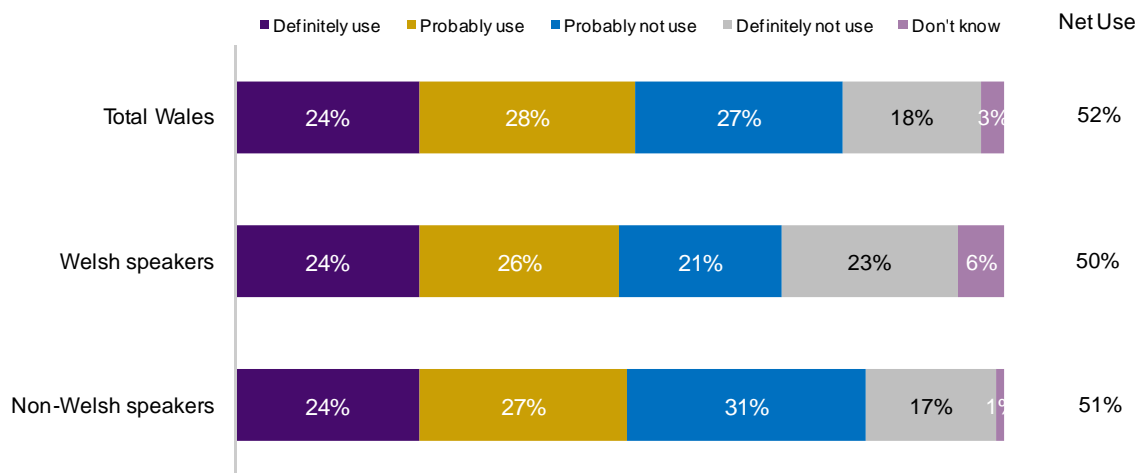
QD1 Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [LOCAL AREA]? Would you...
 Base: Total (2,195), Current users of each media – ever use except where stated
 Source: Ofcom research, carried out by SPA in June 2008

Figure 5.1_5 compares expected take-up of the BBC Local Video service amongst both speakers and non-speakers of the Welsh language in Wales.

Results show that in total, just over half (52%) of the Welsh population who have broadband expect to use the service, including one-quarter (24%) who say they would ‘definitely’ use it.

There is no significant difference in expected usage when comparing Welsh speakers (50%) and non-Welsh speakers (51%).

Figure 5.1_5, Take-up of the BBC Local Video service in Wales amongst Welsh speakers and Non-speakers - Broadband at home



QD1. Likely uptake of BBC Local video service

Base: All with broadband at home in Wales (169), Welsh speakers (103), non-Welsh speakers (60)²³

Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

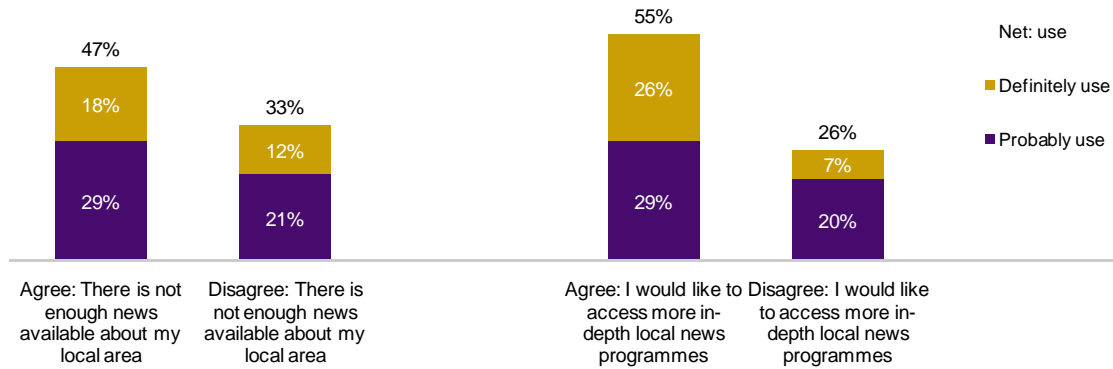
Figure 5.1_6 shows expected take-up of the BBC Local Video service amongst those who show demand for more local news content against those who do not.

Results show that while the BBC Local Video service is more likely to be used by those who demand more local media, the proposed service does not meet the needs of all people who want access to more local content:

- Just under half of those who agree that ‘There is not enough news available about my local area’ expect to use the service
- Just over half of those who agree ‘I would like to access more in-depth local news programmes’ expect to use the service

²³ Caution – small sample size.

Figure 5.1_6, Take-up amongst those with a demand for more local media



QD1 Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [LOCAL AREA]? Would you...?

Base: Those who agree with statement 1 (597), Those who disagree with statement 1 (1,152)

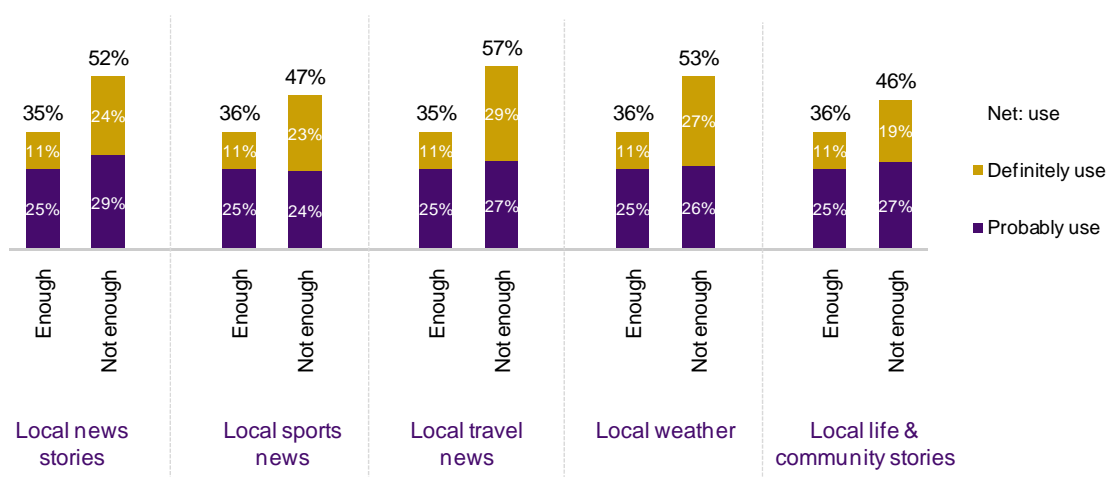
Base: Those who agree with statement 2 (650), Those who disagree with statement 2 (931)

Source: Ofcom research, carried out by SPA in June-August 2008, main survey findings

Additionally, as shown by figure 5.1_7, those who believe there is 'not enough' of each type of local news content are more likely than average to use the BBC Local Video service. For each type of content, around half of those who believe there is 'not enough' coverage currently expect to take-up the service.

However, results again indicate that a sizeable proportion of those people who believe that there is 'not enough' local news coverage do not intend to use the service.

Figure 5.1_7, Take-up by perceptions of current levels of local coverage



QD1 Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [LOCAL AREA]? Would you...?

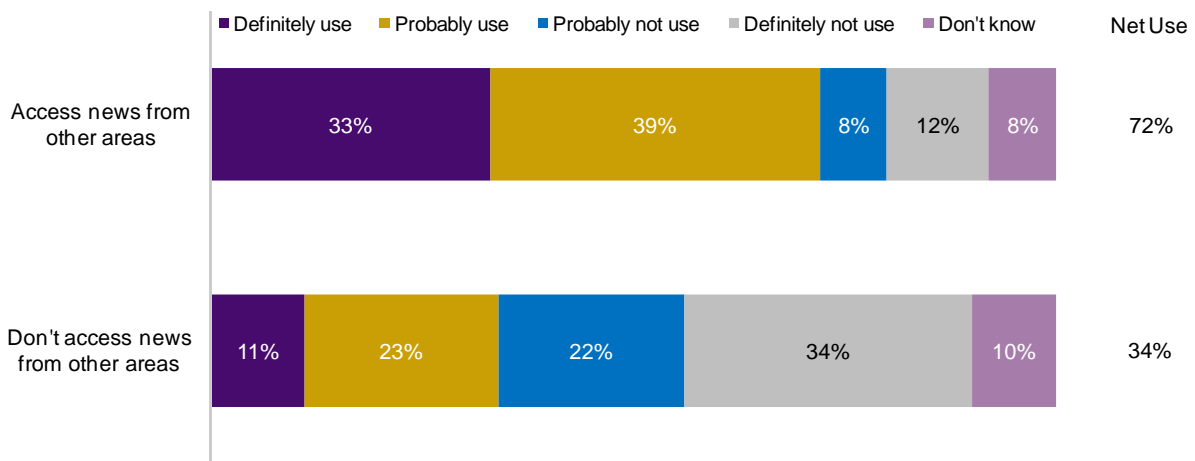
Base: All believe there is 'enough' local news stories (1,679), local sports news (1,593), local travel news (1,682), local weather (1,790), local life and community stories (1,556). 'not enough' local news stories (314), local sports news (238), local travel news (205), local weather (189), local life/community stories (343)

Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

Figure 5.1_8 shows the BBC Local Video service amongst those people who say they access local news about an area they do not currently live in compared to those who do not.

Results show that amongst those who do access local news about other areas²⁴ the BBC Local Video service is more appealing, with almost three quarters likely to use the service and one-third specifically saying they would 'definitely use' it. Intended use amongst this group is more than double the proportion seen amongst those who do not access local news about other locations (72% vs. 34%)

Figure 5.1_8, Take-up amongst those who access news from other areas



QC6. Do you ever access local news and content about a local area that isn't your local area?

QD1 Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [LOCAL AREA]? Would you...?

Base: All who access news from other areas (179), All who do not access news from other areas (1,991)

Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

5.2 PROFILE OF LIKELY USERS OF THE BBC LOCAL VIDEO SERVICE

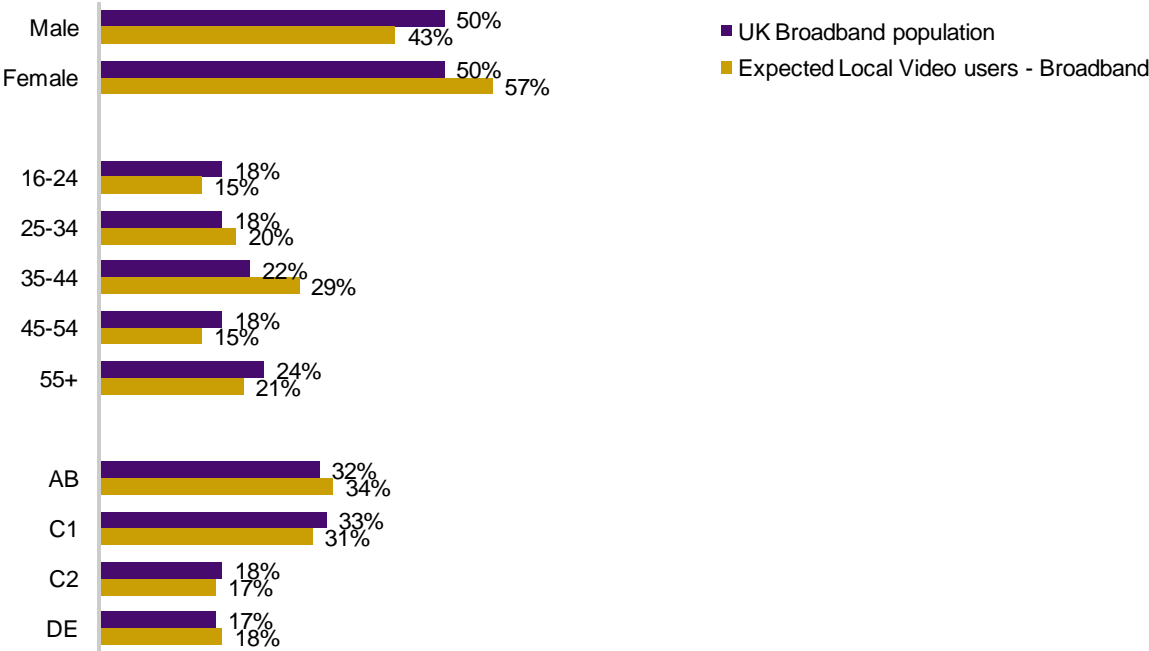
The demographic profile of those with broadband who expect to take-up the BBC Local Video service compared to the UK broadband population profile is shown in Figure 5.2_1.

While mostly consistent with the UK broadband user profile, there are two significant differences with the profile of those who expect to use the BBC Local Video service:

- Likely users are more likely to be Female (57% vs. 50%)
- Likely users are more likely to be aged 35-44 years old (29% vs. 22%)

²⁴ Eight percent of the population say they consume local media about a region they do not currently live in.

Figure 5.2_1, Profile of those who expect to use the BBC Local Video service



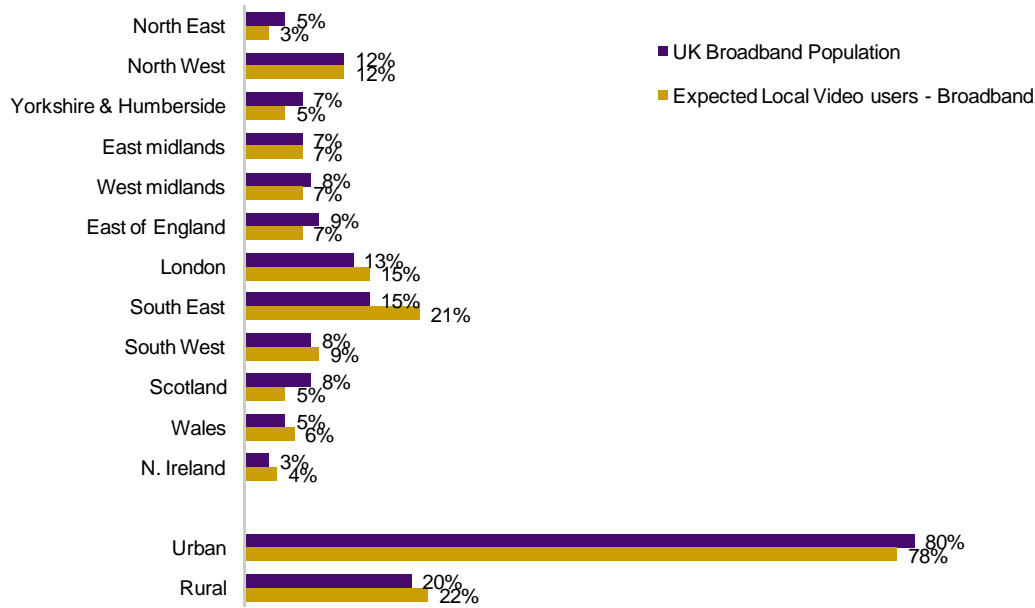
QD1 Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [LOCAL AREA]? Would you...?
 Base: All with broadband at home (1,625), All with broadband who expect to use the service (671)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

Figure 5.2_2 shows the regional profile of those who expect to take-up the BBC Local Video service compared to the profile of those with broadband at home.

Again, the profile of likely users is generally consistent with the UK Broadband population but there are two significant differences:

- The South East represents fifteen percent of population but twenty-one percent of those likely to use the service
- Scotland represents eight percent of the population but five percent of those likely to use the service

Figure 5.2_2, Regional profile of those who expect to use Local Video service



QD1 Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [LOCAL AREA]? Would you...?
 Base: All with broadband at home (1,625), All with broadband who expect to use the service (671)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

5.3 REASONS FOR NOT USING BBC LOCAL VIDEO SERVICE

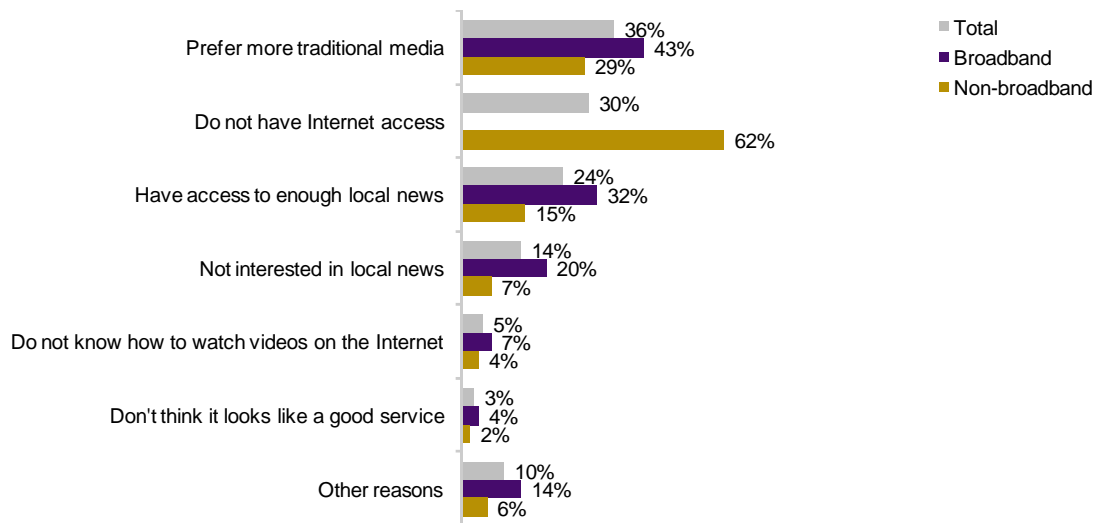
A preference for traditional media and sufficient access to local news, are the main reasons why the BBC Local Video service would not be used by those with broadband access

The reasons why rejecters of the BBC Local Video service do not intend to use it are shown in Figure 5.3_1.

Amongst those with broadband a preference for more traditional media (43%) and having sufficient access to local news at present (32%) are the key reasons for not being likely to use the service. Additionally, one in five cite a lack of sufficient interest in local news as the reason they do not expect to use the service (20%).

As may be expected, amongst those without broadband, it is a lack of internet access that is the main barrier to usage (62%). A preference for more traditional media is also cited by those without broadband access as a barrier to take-up (29%).

Figure 5.3_1, Reasons why BBC Local Video service would not be used



QD2 Why are you unlikely to use the BBC Local Video Service?

Base: All unlikely to use local video service - Total (1,189), All with broadband at home (766), All without broadband at home (423)

Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

5.4 LOCAL CONTENT TYPES LIKELY TO BE ACCESSED VIA THE BBC LOCAL VIDEO SERVICE

The types of local content that would be accessed on the BBC Local Video service reflects overall local media preference

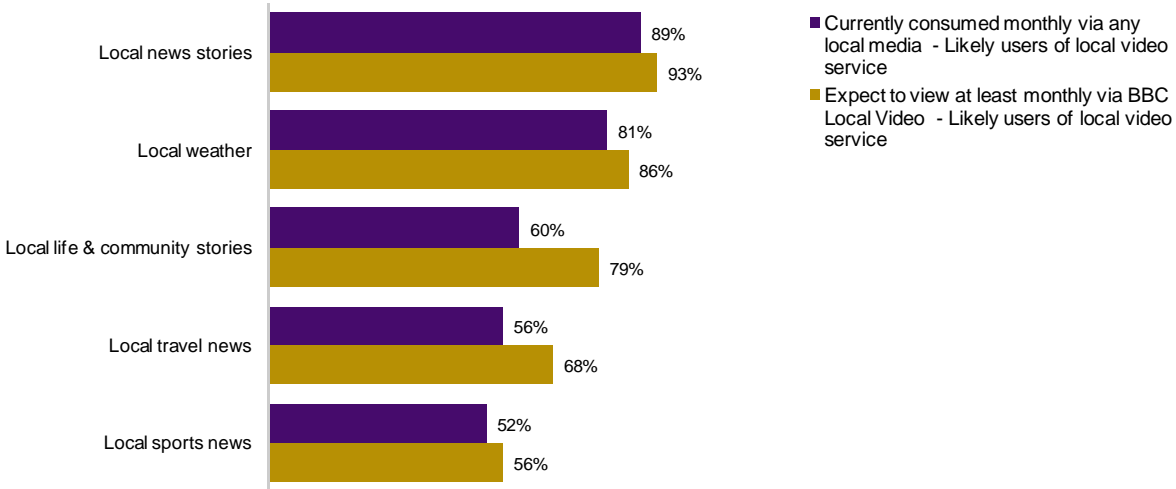
Figure 5.4_1 shows the type of local news that people who intend to use the BBC Local Video service expect to access monthly via the BBC Local website compared with the local news types these people currently access monthly via any local media source.

'Local news stories' are likely to be the most popular content type on the BBC Local Video service, with more than nine in ten likely users saying they would expect to view this content category at least monthly. Weather, which is the content type second most likely to be accessed generally via all sources by those who expect to use the local video service (81%), is also the second most popular type of local content that would be accessed via the local video service (86% use at least monthly).

Four in five of those likely to use the service say they would access 'Local life and community stories' each (79%), two-thirds say they would access local travel news (68% monthly) and more than one-half (56% monthly) local sports news.

The results showed no significant difference in the type of news content that those with broadband and those without broadband would intend to access via the service.

Figure 5.4_1, Type of news expect to be accessed monthly via BBC Local Video service



QB1A. Which of the following types of local media content, if any, do you read, watch or listen to at least monthly?
 QD3 And, how often, if at all, would you expect to use this local video service for each of the following? – Net: Monthly
 Base: All likely to use local video service (782)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

5.5 FREQUENCY OF USING THE BBC LOCAL VIDEO SERVICE

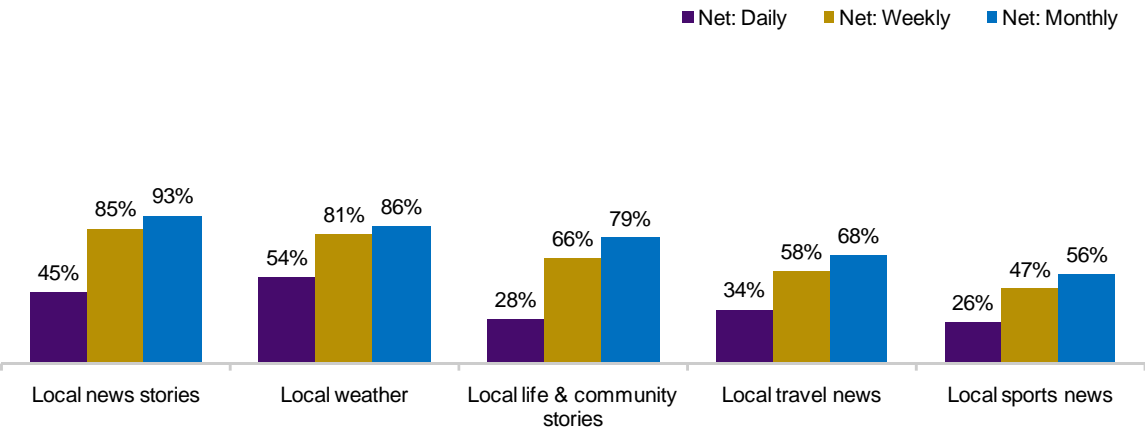
Figure 5.5_1 shows the proportion of those with broadband at home who would access each type of news via the BBC Local Video service on a daily, weekly and monthly basis.

Comparing total expected usage by local content type, shows that while local weather is not the most popular type of content overall, it is the content most likely to be accessed daily (54%), marginally ahead of Local News stories (45%).

Just over one-quarter of expected users say they would view ‘Local sports news’ or ‘Local life and community’ stories respectively each day.

Local travel news would be consumed daily by around one-third (34%) of likely users of the service.

Figure 5.5_1, Expected frequency of using BBC Local Video service by type of local news – Broadband at home



QD3 And, how often, if at all, would you expect to use this local video service for each of the following?²⁵
 Base: All likely to use local video service with broadband at home (682)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

5.6 EXPECTED TIME SPENT VIEWING PER VISIT

The average viewing time for the BBC Local Video service during each single visit is expected to be around quarter of an hour

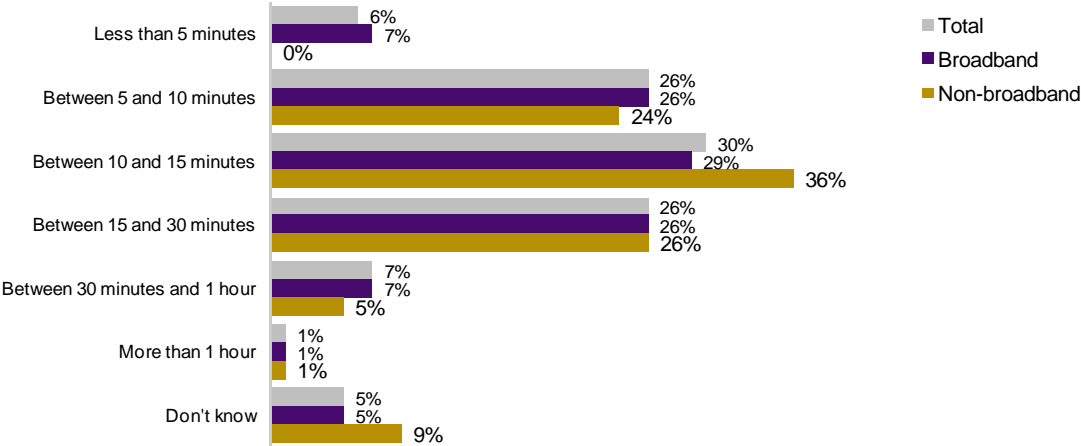
Figure 5.6_1 shows how long expected users of the BBC Local Video service would spend using the service each time they used it.

The majority of users of the Local Video service would expect to use it for no more than 15 minutes each time they accessed it (63%). This compares to one-third (33%) of likely users who expect to use the service for more than 15 minutes during each visit.

Taking the mid-point of each of the time-bands to derive an average time spent viewing per session would give an average access time per session of 16 minutes.

²⁵ 'Net: Daily' = Cumulative sum of 'More than once a day'/'About once a day'
 'Net: Weekly' = Cumulative sum of 'Net: Daily'/'About once a week or more'
 'Net: Monthly' = Cumulative sum of 'Net: Weekly'/'2 to 3 times per month'/'About once a month'

Figure 5.6_1, Time expected users would anticipate using the BBC Local Video service each time they accessed it



QD5 How much time would you expect to spend viewing the BBC Local Video service each time you accessed it?
 Base: All likely to use local video service - Broadband at home (682) , Without broadband at home (100)
 Source: Ofcom research, carried out by SPA in June 2008, main survey data

5.7 EXPECTED USAGE OCCASIONS FOR BBC LOCAL VIDEO SERVICE

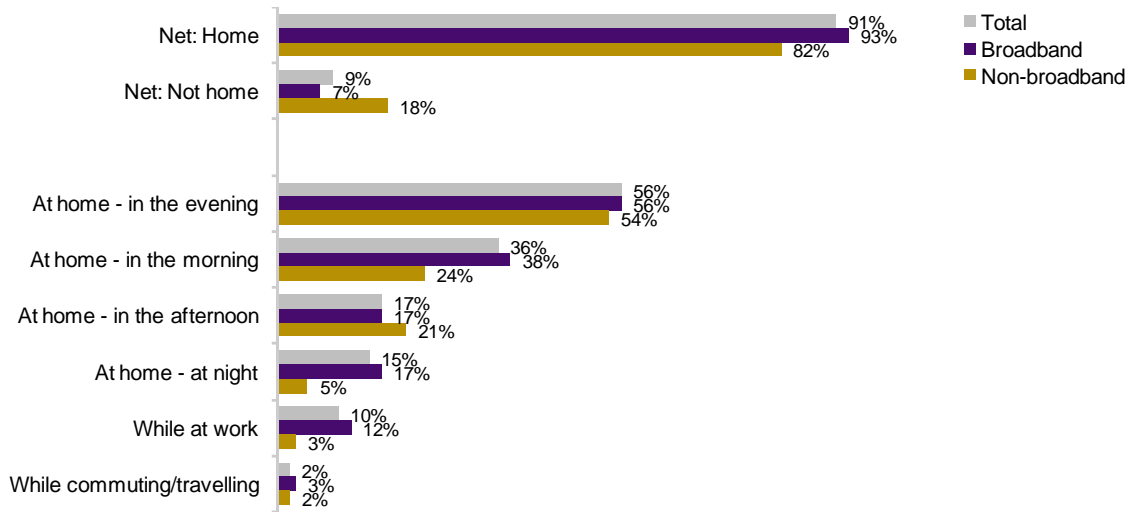
The BBC Local Video service would primarily be viewed in the home, with evenings and mornings the most popular viewing times on weekdays

Figure 5.7_1 shows where and when expected users anticipate using the BBC Local Video service on weekdays.

The vast majority of potential users say they would use the service while in the home – both on weekdays (91%). The evening is the time of day that the service is most likely to be accessed during weekdays, with more than half of potential users (56%) saying they would use the service ‘at home - in the evening’. At home – in the morning is the second most popular time and location to access the service during weekdays, mentioned by more than a third of expected users (36%).

Less than one in ten of those likely to use the service say they expect to use the service outside of the home. Amongst likely users, out of the home viewing is more likely to be at the workplace (10%) than while commuting or travelling (2%).

Figure 5.7_1, When and where expected users expect to use the BBC Local Video Service on weekdays



QD6 If it was available, when and where would you expect to use the BBC Local Video service on week days (Monday to Friday)?
 Base: All likely to use local video service – Total (782), Broadband at home (682), Without broadband at home (100)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

5.8 EXPECTED METHOD OF VIEWING BBC LOCAL VIDEO SERVICE

Most users would access the Local Video service on a computer. Few expect to access the service via a mobile phone

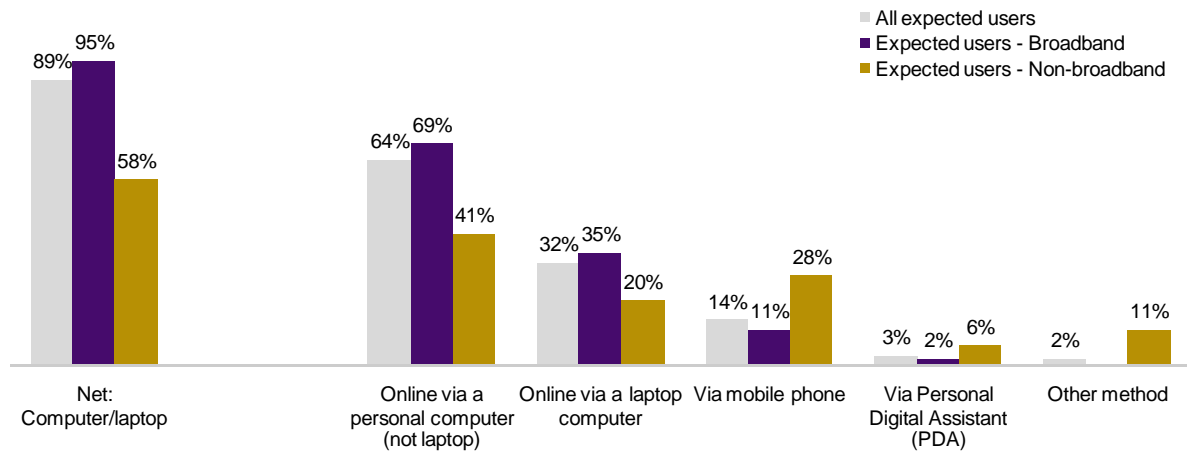
Figure 5.8_1 shows how likely users expect to view the BBC Local Video service.

Amongst those with broadband, as might be expected, a computer is by far the most likely means of accessing the service (95%). A desktop computer is twice as likely to be used as a laptop to access the BBC Local Video service (69% vs. 35%).

For those without broadband, a computer is also the most popular means that they intend to use to access the service (58%). This suggests that these people either intend to get internet access at home in the future or expect to access the service via an internet connection that is not in their own home.

The proportion expecting to use a mobile phone to access the service is comparatively low, with only one in ten saying they would use a mobile. However, amongst likely users who do not have broadband at home, a greater proportion say they would use a mobile phone to access the Local Video service (28%).

Figure 5.8_1, How likely users of the BBC Local Video service expect to access the service



QD7 And which of the following methods do you think you would use to access the BBC Local Video service?²⁶
 Base: All likely to use local video service - Broadband at home (682), Without broadband at home (100)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

5.9 PREFERRED LANGUAGE FOR THE SERVICE (WALES)

In Wales, thirteen percent of those who expect to use the service would want a Welsh language version of the service

People in Wales who expect to use the BBC Local Video service were asked which language they would prefer to access the service in. Figure 5.9_1 shows the language preference.

In total, more than four in five (83%) would prefer an English language BBC Local Video service compared to thirteen percent who say they would like a Welsh language service (2% Welsh, 12% both Welsh and English²⁷). This reflects closely the proportion of those who said that they could ‘speak, read and write’ in the Welsh language.

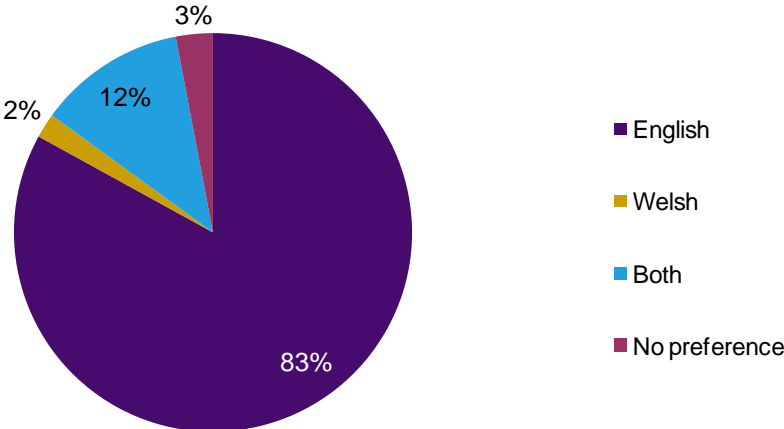
Amongst those who have knowledge of the Welsh language, more than half would like to see the service available in Welsh.²⁸

²⁶ ‘Net: Computer/laptop’ refers to any mention of either a personal computer or laptop computer.

²⁷ Results subject to data rounding.

²⁸ Small base of 57 people, results are indicative.

Figure 5.9_1, Preferred language for the BBC Local Video service amongst likely users in Wales



QD8. Would you prefer the content available to be provided in English, Welsh, or both?
Base: All those likely to use the BBC local video service in Wales (96)
Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

6 IMPACT OF THE LOCAL VIDEO SERVICE

6.1 LIKELIHOOD THAT THE SERVICE WOULD CHANGE CURRENT LOCAL MEDIA CONSUMPTION²⁹

The majority of likely users of the BBC Local Video service would not expect to change their use of existing local media sources if the service was launched

Those people who said they were likely to use the BBC Local Video service were asked whether they anticipate the use of the service would change their use of other local media sources. Figure 6.1_1 shows for each media source currently used whether users would use the BBC Local Video service and the proportion of users who say they would change their consumption of each source of local media following its introduction.

For each existing media source, the majority of existing users of each service do not anticipate that the BBC Local Video service would impact upon their use of other local media.

Users of websites with local news media are most likely to change their behaviour following the launch of the BBC service:

- More than three-quarters (77%) of those who use local newspaper websites would expect to take-up the service and seventeen percent would expect to change their behaviour
- Just under three-quarters (72%) of those who visit 'other websites' with local news would expect to take-up the service and fourteen percent would expect to change their behaviour

Less than one in ten readers of each local newspaper type would expect to change their behaviour if the local video service was launched:

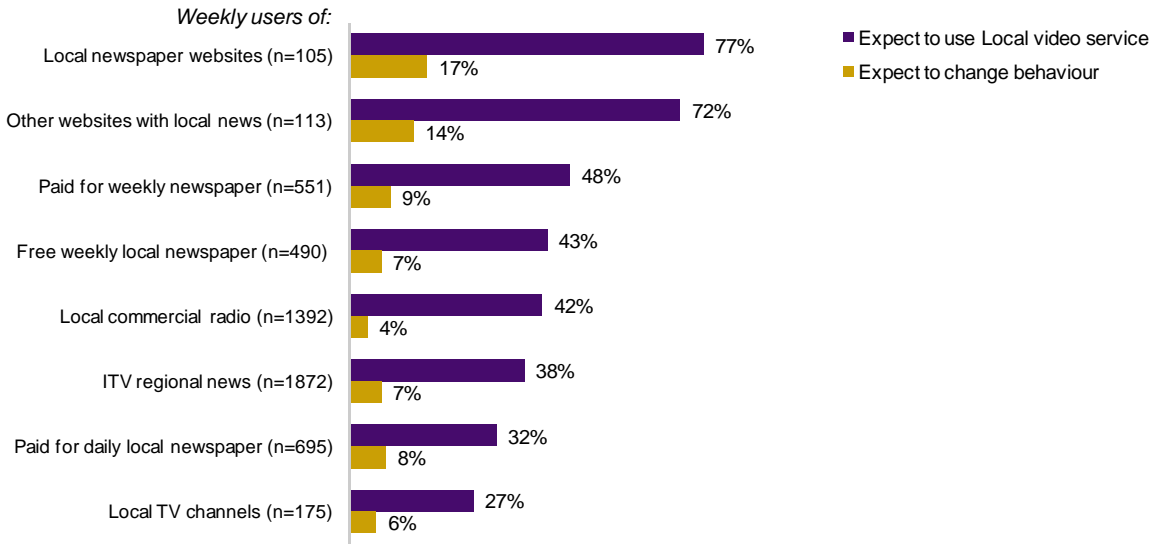
- Almost half of those who read paid for weekly newspapers (48%) expect to use the service and just under one in ten (9%) expect to change their consumption
- Around one-third of those who read paid for daily newspapers (32%) expect to use the service and eight percent expect to change their consumption
- Forty-three percent of those who read free weekly newspapers expect to use the service and seven percent expect to change their consumption

A comparatively small proportion of those who consume local broadcast media expect to change their behaviour:

- Thirty-eight percent of weekly viewers of ITV regional news expect to use the service and seven percent expect to change their consumption
- Just over one-quarter of those who watch local TV channels expect to use the service and six percent expect to change their consumption

²⁹ Assessing the impact of the BBC Local Video service is subject to the same research considerations as measuring likely take-up. These are detailed in section 8.2 of this report.

Figure 6.1_1, Likelihood to use the service and change behaviour as a result by current local media sources used – Total population



QD1. Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [LOCAL AREA]? Would you...?
 QD9a. How likely is it that use of the BBC local video service would change your use of each of the following sources of local news and content?

Base: Total who use each type of media weekly (in brackets), Local TV based on monthly use³⁰
 Source: Ofcom research, carried out by SPA in June 2008, main survey data

6.2 IMPACT ON OTHER SOURCES OF LOCAL MEDIA

Websites with local news content would be most likely to experience a reduction in usage if the BBC launched the Local Video service

To assess the overall impact of the BBC Local Video service on current local media sources, we asked those who expect to use the service and also expect to change their use of each local media type they use, in what way they expect to change their behaviour.

Table 6.2_1 shows the results of this analysis rebased on those who use each source of local media weekly.

Websites with local content are again the services most likely to be affected:

- Fourteen percent of weekly local newspaper website visitors expect to use these websites less though none would stop their usage
- Thirteen percent of weekly visitors to other types of website with local news³¹ expect to use them less. None would stop their usage as a result

³⁰ Base sample includes booster interviews for local newspaper websites, other local websites with local news and local TV channels

³¹ 'Other type of website' excludes newspaper and commercial radio station websites

For each type of newspaper currently read, similar proportions would expect to read them less if the BBC introduced the Local Video service:

- For both paid for weekly and paid for daily local newspapers, seven percent of weekly readers say they would read less/stop
- For free weekly local newspaper readers, six percent of weekly readers say they would read less

Local broadcast media is less likely to be affected if the BBC Local Video service was launched:

- Six percent of weekly ITV regional news viewers expect to watch less often (2% a lot less, 4% a little less)
- Three percent of weekly local commercial radio station listeners expect to listen less often (1% a lot less, 2% a little less), none would stop listening

Table 6.2_1, Impact on consumption of current local media sources for local news content – Current users of each local media

<i>Weekly users of each media</i> ³²	Stop using	Do a lot less	Do a little less	Net: Less	Do a little more	Do a lot more	Net: More
Local newspaper websites (n=105)	0%	4%	11%	14%	1%	1%	2%
Other websites with local news ³³ (n=113)	0%	3%	9%	13%	0%	0%	0%
Paid for weekly local newspaper (n=551)	3%	3%	2%	7%	0%	0%	0%
Free weekly local newspaper (n=490)	0%	2%	4%	6%	0%	0%	0%
Local commercial radio (n=1,392)	0%	1%	2%	3%	0%	0%	0%
ITV regional news (n=1,872)	0%	2%	4%	6%	0%	0%	1%
Paid for daily local newspaper (n=695)	1%	3%	3%	7%	0%	0%	0%
Local TV channels (n=175) ³⁴	0%	0%	4%	4%	0%	0%	2%

QD9b. What is the likely effect of the introduction of a BBC Local Video service on your use of the following? For each, please say whether the introduction of the service would stop you doing each or make you do each less, more or make you start using.³⁵

Rebased on: Total who use each type of media weekly (in brackets)

Source: Ofcom research, fieldwork carried out by SPA in June 2008, main survey data

³² Local website categories include booster interviews in the sample.

³³ Other websites with local news does not include radio station website. This category of website was asked separately but has not been included in analysis due to low sample size.

³⁴ Local TV channel viewers are monthly viewers rather than weekly.

³⁵ The question was asked only of those who expect to use the BBC Local Video service. Figures in table 6.2_1 are rebased on all those who use each media type.

Table 6.2_2 shows the same data as Table 6.2_1 but is based on current users of each local media who would also expect to use the BBC Local Video service.

Table 6.2_2, Impact on consumption of current local media sources for local news content – Current users of each local media who would expect to use the BBC Local Video service

<i>Current weekly users of each media who are likely to use the BBC Local Video service³⁶</i>	Stop using	Do a lot less	Do a little less	Net: Less	Do a little more	Do a lot more	Net: More
Paid for daily local newspaper (n=230)	3%	8%	11%	22%	0%	0%	0%
Local newspaper websites (n=82)	0%	5%	14%	19%	1%	2%	3%
Other websites with local news ³⁷ (n=84)	0%	5%	13%	18%	1%	0%	1%
ITV regional news (n=685)	1%	5%	10%	15%	1%	0%	1%
Free weekly local newspaper (n=194)	1%	5%	9%	15%	0%	0%	0%
Paid for weekly local newspaper (n=273)	5%	5%	4%	14%	0%	0%	0%
Local commercial radio (n=529)	0%	3%	4%	7%	1%	0%	1%

QD9b. What is the likely effect of the introduction of a BBC Local Video service on your use of the following? For each, please say whether the introduction of the service would stop you doing each or make you do each less, more or make you start using.

Rebased on: Total who use each type of media weekly and are likely to use the local video service (in brackets)

Source: Ofcom research, fieldwork carried out by SPA in June 2008, main survey data

6.3 IMPACT ON PREFERRED SOURCE FOR LOCAL NEWS

The BBC Local website would be significantly more likely to be chosen for local news stories if the local video service was available

Following the introduction of the BBC Local Video concept to respondents, respondents were again asked which sources they would use first and in total for 'local news stories'. This time it was presumed that the BBC Local Video service would be available on the BBC Local website.

The research suggests that the addition of video content to the BBC Local website would have a significant impact on the likelihood that the site would be chosen for viewing local news stories:

- Respondents indicated that they would be more than three times as likely to choose the BBC Local website first if the local video service was added (17% would choose first if local video service was available, 4% would choose first now)
- The BBC Local website would be four times as likely to be chosen overall for local news stories (31% would choose if the local video was available, 6% would choose now)

³⁶ Local website categories include booster interviews in the sample.

³⁷ Other websites with local news does not include radio station website. This category of website was asked separately but has not been included in analysis due to low sample size.

Table 6.3_1 summarises both the likelihood for each source to be mentioned (first and in total) both with and without the BBC Local Video service being available amongst the total population.

The results show that the BBC Local Video service would have a slight negative impact on the likelihood of some services to be chosen for local news stories:

- ITV regional news (55% would choose after, down 4 points)
- Local commercial radio (24% would use after, down 4 points)
- Daily paid for newspapers (21% would use after, down 3 points)
- Weekly paid for newspapers (17% would use after, down 3 points)

Table 6.3_1, Impact of the BBC Local Video service on the media sources used for ‘local news stories’ – Total Population

	Current choice		Choice after BBC Local Video launch		Overall Impact on likelihood to be chosen – percentage point change ³⁸
	First choice	Total choice	First choice	Total choice	
ITV Regional news	31%	59%	24%	55%	-4 points
BBC Regional news	13%	45%	13%	44%	-1 point
BBC Local website	4%	6%	17%	31%	+25 points
Local commercial radio	12%	28%	10%	24%	-4 points
Daily paid for newspapers	11%	24%	8%	21%	-3 points
Weekly free newspapers	5%	22%	5%	20%	-2 points
Weekly paid for newspapers	8%	20%	5%	17%	-3 points
Local newspaper website	1%	6%	2%	6%	No change
Other local website	2%	7%	2%	6%	-1 point
BBC Local radio	2%	5%	1%	5%	No change
Local TV channel	1%	5%	1%	4%	-1 points
Daily free newspaper	1%	4%	1%	4%	No change
Commercial radio website	0%	2%	0%	2%	No change
Mobile phone	0%	0%	0%	1%	+1 point

QD9c/d. Imagine that this BBC local video service was available on the BBC Local website (formerly ‘Where I live’). Thinking again about the sources you would use for local news and content, which of the following would be likely to be your first source of new information from each of the following categories of local content? And which other sources of local content would you also use for each?

Base: Total (2,195)

Source: Ofcom research, fieldwork carried out by SPA in June 2008, main survey data

³⁸ Sources significantly less likely to be chosen overall are shaded in red, sources significantly more likely to be chosen overall are shaded in green

Table 6.3_2 summarises these results amongst existing users of each type of local media.

Amongst existing weekly users of the BBC Local website, the introduction of the video service would only have a marginal impact on the likelihood that it would be chosen as a source for local news stories (73% would choose after introduction of video service, up three points). However, there is a more marked increase in the likelihood that users would turn to BBC Local as the first source they choose to visit for local news stories (48%, up eleven points).

Results amongst existing users of each media again show that the local video service would have a negative impact on the likelihood of some services being chosen for 'local news stories':

- ITV regional news (70% would choose, down 6 points)
- Daily paid for newspapers (58% would choose, down 9 points)
- Weekly paid for newspapers (54% would choose, down 8 points)
- Free weekly newspapers (50% would choose, down 7 points)
- Local newspaper website (50% would choose, down 8 points)
- Commercial radio (47% would choose, down 7 points)

Table 6.3_2, Impact of the BBC Local Video service on the media sources used for 'local news stories' – Amongst current weekly users of each media

	Current choice		Choice after BBC Local Video launch		Overall Impact on likelihood to be chosen – percentage point change ³⁹
	First choice	Total choice	First choice	Total choice	
ITV Regional news	39%	76%	31%	70%	-6 points
BBC Regional news	20%	60%	19%	61%	+1 point
Local commercial radio	23%	55%	19%	47%	-7 points
Daily paid for newspapers	33%	67%	24%	58%	-9 points
Weekly paid for newspapers	25%	62%	15%	54%	-8 points
Weekly free newspapers	13%	57%	10%	50%	-7 points
BBC Local website	37%	70%	48%	73%	+3 points
Local newspaper website	15%	58%	18%	50%	-8 points
BBC Local radio	9%	18%	4%	24%	+6 points
Other local website	8%	28%	3%	24%	-4 points
Daily free newspaper	19%	50%	8%	46%	-4 points

QD9c/d. Imagine that this BBC local video service was available on the BBC Local website (formerly 'Where I live'). Thinking again about the sources you would use for local news and content, which of the following would be likely to be your first source of new information from each of the following categories of local content? And which other sources of local content would you also use for each?

Base: All who currently use each service weekly

Source: Ofcom research, fieldwork carried out by SPA in June 2008, main survey data

³⁹ Sources significantly less likely to be chosen overall are shaded in red

6.4 IMPACT ON OVERALL LOCAL MEDIA CONSUMPTION

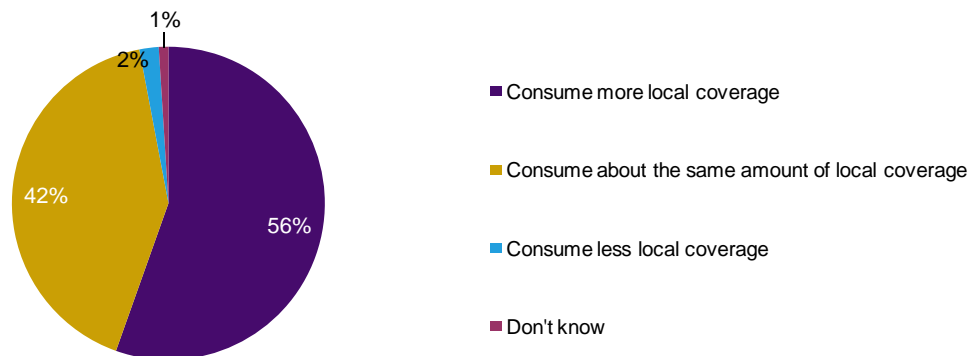
The proposed BBC Local Video service would be likely to increase overall levels of local media consumption, with twenty-one percent of the total UK population expecting to consume more local media overall

Figure 6.4_1 shows the expected impact the BBC Local Video service would have on the overall consumption of local content among its expected users.

The introduction of the BBC Local Video service would clearly have a positive impact on the level of local media consumed, with more than half (56%) of those who expect to use the service saying that they would consume more local content.

With two in five (42%) users stating that they would consume about the same amount of local content once the service is introduced, results confirm that for some users the BBC Local Video service would be used as substitute to existing sources of local content.

Figure 6.4_1, Impact of the BBC Local Video service on overall consumption of local content – Likely users with broadband



QD10. What impact would the BBC Local Video service have on the total amount of local content you consume?

Base: All those with broadband at home likely to use the BBC local video service (682)

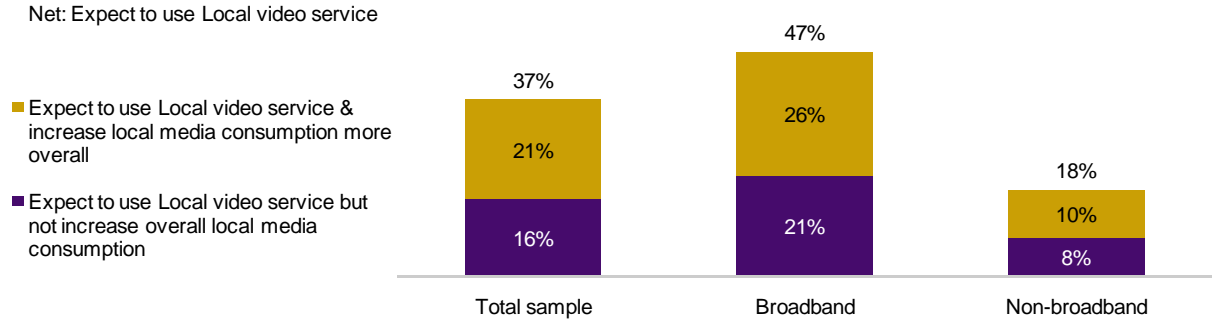
Source: Ofcom research, fieldwork carried out by SPA in June-August 2008, main survey data

Figure 6.4_2 shows the expected likely take-up of the BBC Local Video service together with the proportion who expect to use the service more or about the same.

Rebasing results on the total population (including those who do not expect to use the Local Video service), twenty-one percent of the population would consume 'more' local media coverage.

In total, 16% of the population say they would use the BBC Local Video service but not change their current consumption of local media. This figure indicates that some people would reduce consumption of news from existing local media sources following the introduction of the BBC Local Video service.

Figure 6.4_2, Take-up of Local Video service and changes in current consumption amongst the total population

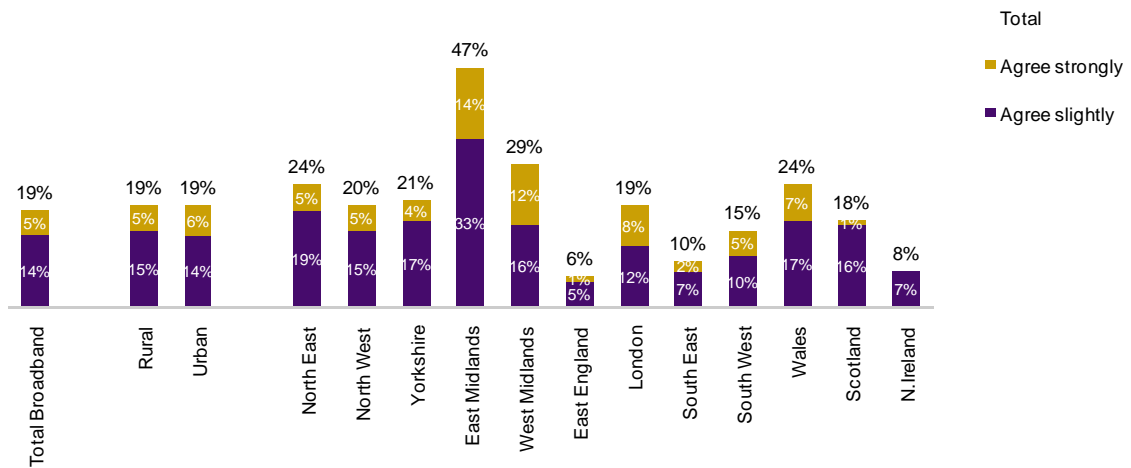


QD10. What impact the BBC Local Video service would have on the total amount of local content you consume?
 Base: Total (2,195), All with broadband at home (1,625), All without broadband at home (570)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

7 APPENDIX 1 - ADDITIONAL RESEARCH FINDINGS

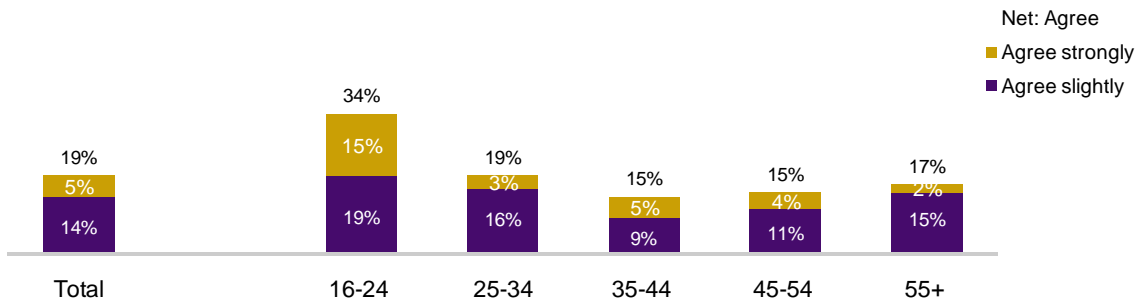
7.1 ADDITIONAL FINDINGS USED AS REGRESSION INPUTS

Figure 7.1_1, Agreement with the statement “I don't really pay attention to local news stories” by region – Broadband at home



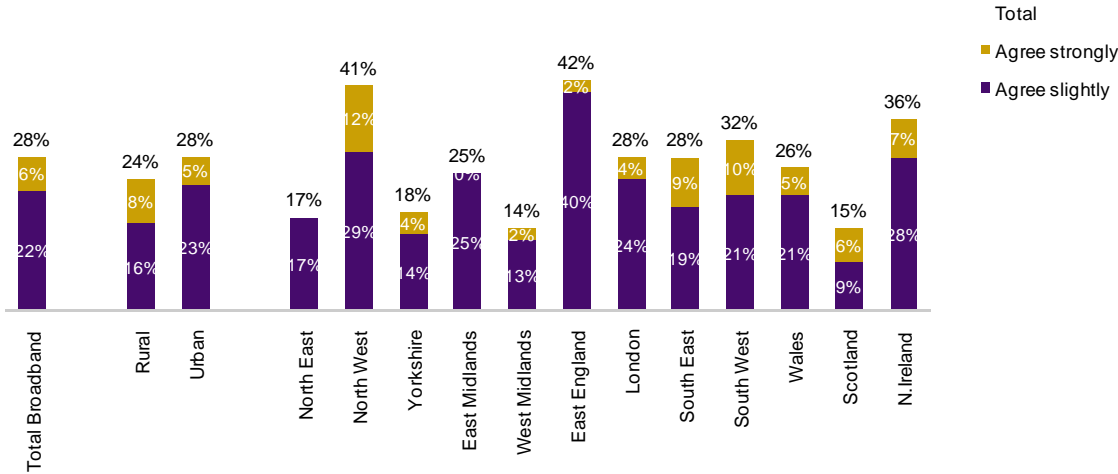
QC5. Please tell me to what extent you agree or disagree with each statement.
 Base: All with broadband at home (1,625)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

Figure 7.1_2, Agreement with the statement “I don't really pay attention to local news stories” by age – Broadband at home



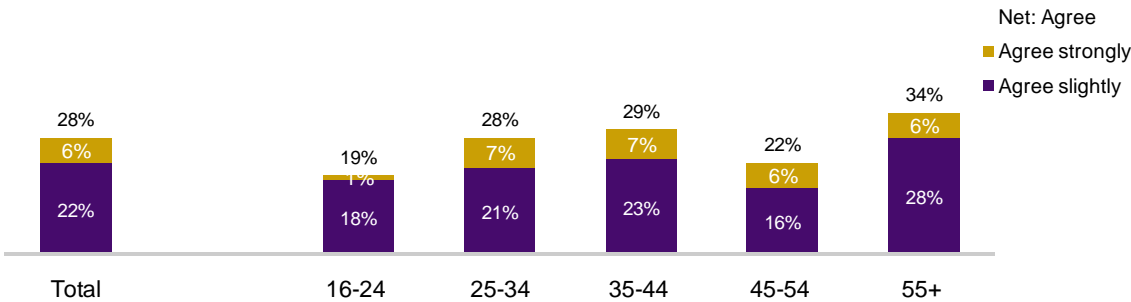
QC5. Please tell me to what extent you agree or disagree with each statement.
 Base: All with broadband at home (1,625)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

Figure 7.1_3, Agreement with the statement “I would like to access more in-depth local news programmes” by region – Broadband at home



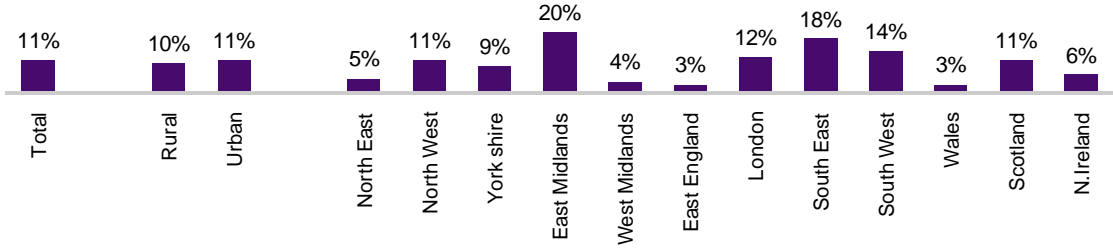
QC5. Please tell me to what extent you agree or disagree with each statement.
 Base: All with broadband at home (1,625)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

Figure 7.1_4, Agreement with the statement “I would like to access more in-depth local news programmes” by age – Broadband at home



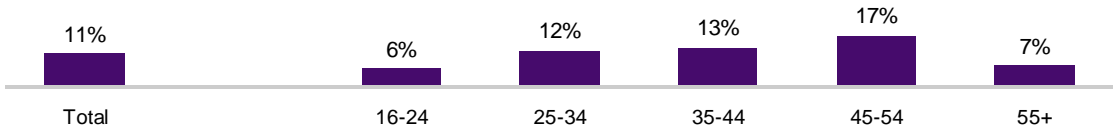
QC5. Please tell me to what extent you agree or disagree with each statement.
 Base: All with broadband at home (1,625)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

Figure 7.1_5, Use of the BBC News website for news by region – Broadband at home



QC1. Which of the following BBC services, if any, do you use on a weekly basis for news? – BBC News website
 Base: All with broadband at home (1,625 main survey)
 Source: Ofcom research, carried out by SPA in June-August 2008, omnibus survey data

Figure 7.1_6, Use of the BBC News website for news by age – Broadband at home



QC1. Which of the following BBC services, if any, do you use on a weekly basis for news? – BBC News website
 Base: All with broadband at home (1,625 main survey)
 Source: Ofcom research, carried out by SPA in June-August 2008, omnibus survey data

Table 7.1_1, Content type accessed via each type of local media - Total

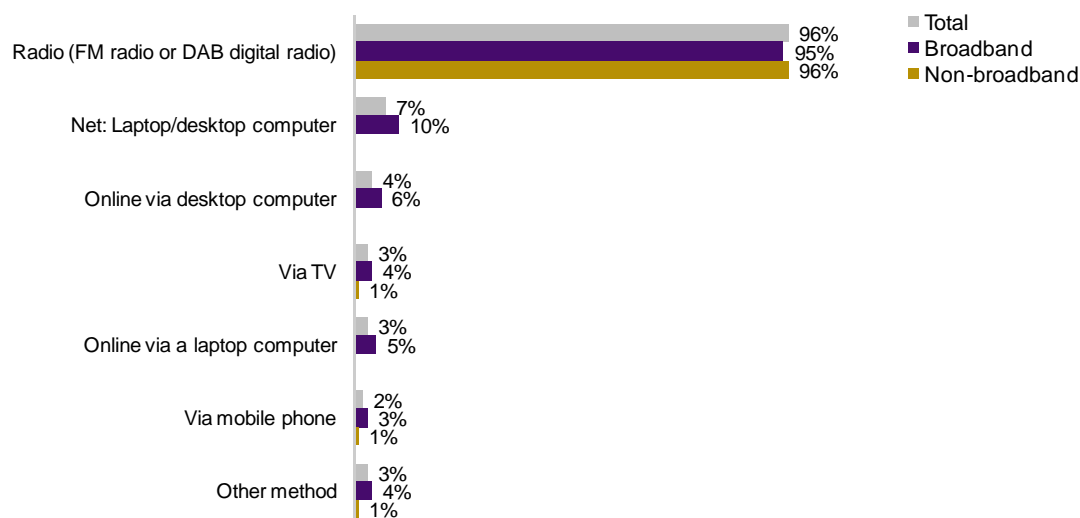
	Would expect to use on BBC service	Currently use on local services			
		Local newspapers	Local commercial radio	Local websites	Local TV
Local news stories	88%	97%	84%	71%	85%
Local weather	68%	55%	73%	53%	83%
Local travel news	55%	46%	60%	33%	48%
Local life & community stories	52%	72%	45%	36%	58%
Local sports news	46%	55%	49%	34%	66%

Base: Likely users of the BBC Local Video service (782), Weekly readers of local newspapers (1,435), Weekly listeners of local commercial radio (1,392), Weekly visitors to websites with local news content (158), Monthly viewers of Local TV channels (169 including booster interviews)

Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

7.2 METHODS OF ACCESSING LOCAL MEDIA

Figure 7.2_1, Method of listening to local commercial radio - Summary

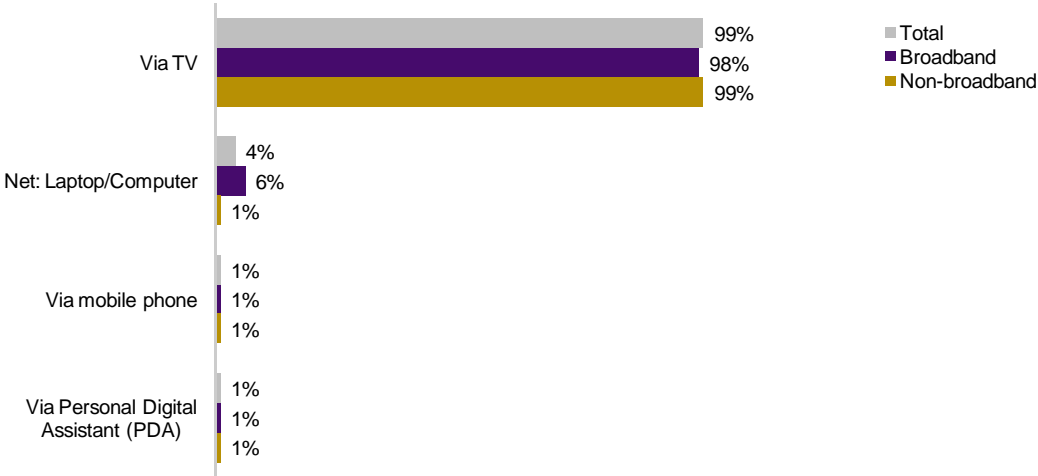


QB2D. In which of the following ways do you currently listen to commercial radio?

Base: All listening to commercial radio weekly – Total (1,392), Broadband at home (1,037), All without broadband at home (355)

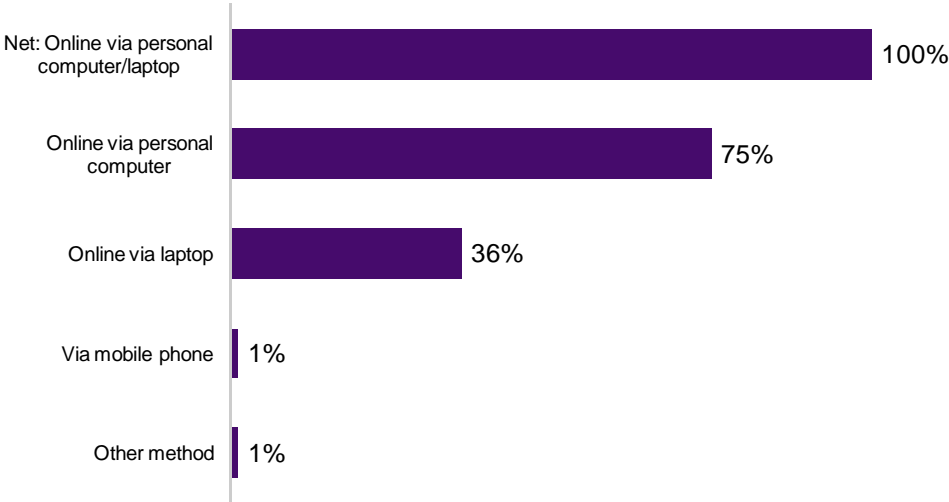
Source: Ofcom research, carried out by SPA in June 2008, main survey data

Figure 7.2_2, Methods of viewing ITV regional news - Summary



QB4C: How do you watch ITV regional news?
 Base: All watching ITV regional news weekly – Total (1,782), Broadband at home (1,367), Without broadband at home (505)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

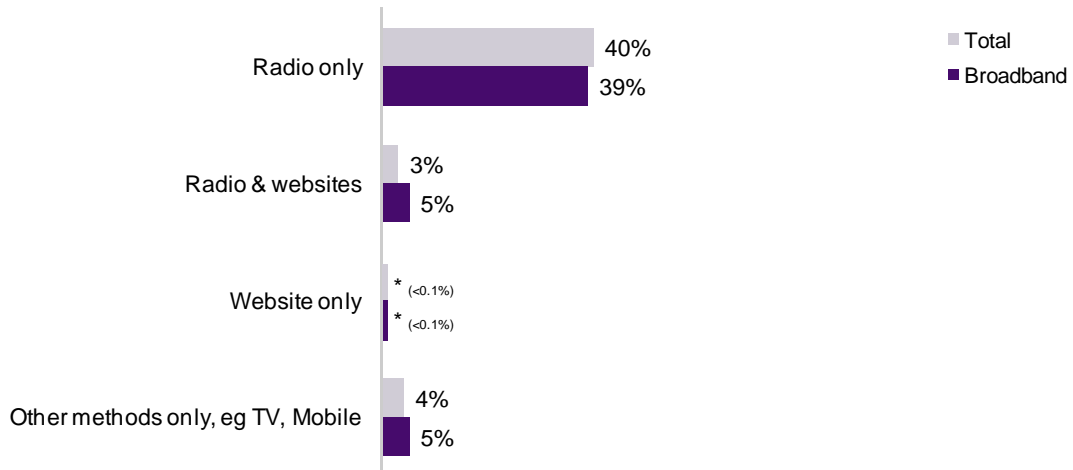
Figure 7.2_3, Methods of accessing local websites - Broadband at home



QB5e: How do you typically view local websites?
 Base: All who visit websites for local news at least weekly (158)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

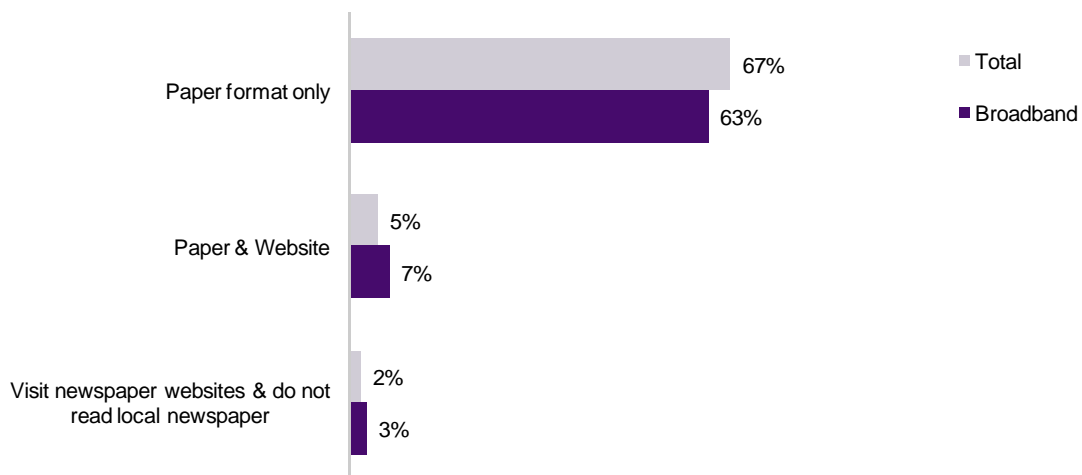
7.3 OFFLINE VS. ONLINE ACCESS TO RADIO AND NEWSPAPERS

Figure 7.3_1, Methods of listening to local commercial radio - Summary



Base: Total respondents (2,195), All with broadband at home (1,625)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

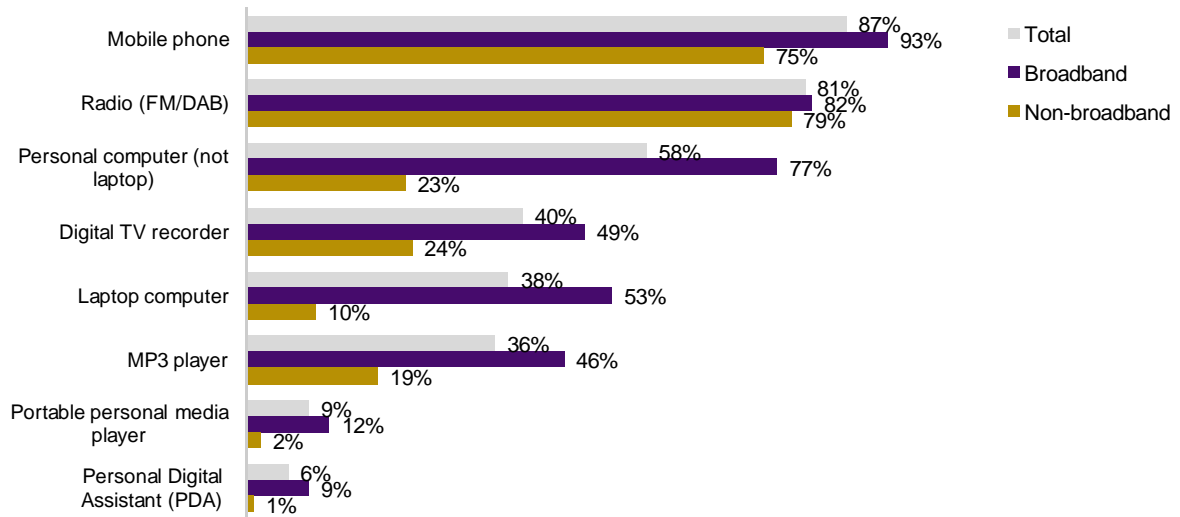
Figure 7.3_2, Formats used to read local newspapers



Base: Total respondents (2,195), All with broadband at home (1,625)
 Source: Ofcom research, carried out by SPA in June-August 2008, main survey data

7.4 TECHNOLOGY USED WITHIN THE HOME

Figure 7.4_1, Technology owned and used



QA1. Which of the following, if any, do you have in your household and personally use yourself?
 Base: Total (2,195), All with broadband at home (1,625), All without broadband at home (570)
 Source: Ofcom research, carried out in June-August 2008, main survey data

8 APPENDIX 2 - FURTHER METHODOLOGY DETAILS

8.1 SURVEY SAMPLE

The main survey employed a quota sampling approach, with sample quotas set on broadband access in the home, region and socio-demographics. This approach was necessary to ensure that we had the ability to analyse results at a regional level and also to conduct in-depth analysis within the audience most likely to be affected by the BBC Local Video service – those with broadband access.

As a result of employing quota sampling, the data at the total level was not nationally representative when compared to the UK population, with some groups and regions over-represented and others under-represented. SPA, in consultation with Ofcom, applied subsequent weighting to the data to ensure that results were representative of the UK population as a whole.

The tables below shows the data from the main survey which was weighted prior to analysis:

Total sample: Broadband at home vs. No broadband at home

	Achieved	Weighted
<i>Total sample size</i>	2,195	2,198
Broadband access at home	75%	65%
No broadband access at home	25%	35%

Region

	Achieved	Weighted
<i>Total sample size</i>	2,195	2,198
East Midlands	7%	7%
East of England	6%	9%
London	7%	12%
North East	8%	4%
North West	8%	12%
South East	10%	14%
South West	6%	8%
West Midlands	8%	9%
Yorkshire & Humberside	7%	8%
Scotland	13%	9%
Northern Ireland	12%	3%
Wales* (incl Welsh speakers boost)	10%	5%
Urban location	78%	81%
Rural location	22%	19%

Socio-demographics

	Achieved	Weighted
<i>Total sample size</i>	2,195	2,198
Sex		
Male	47% ⁴⁰	48%
Female	52%	52%
Age		
16-34	36%	33%
35-54	38%	35%
55+	26%	33%
Social grade		
AB	22%	25%
C1	32%	30%
C2	19%	18%
DE	26%	27%

Weekly Media consumption (% consuming each type of media weekly)

	Achieved	Weighted
<i>Total sample size</i>	2,195	2,198
Commercial radio stations	63%	47%
Read local newspaper	67%	72%
ITV regional news	85%	70%
BBC regional news	79%	58%
Websites with local news	7%	18%
BBC local website	3%	5%

Welsh speaker booster

To allow for a comparison of results by both Welsh and Non-Welsh speakers in Wales, a booster sample of Welsh speakers was surveyed. A representative sample of the Welsh population would not have provided sufficient interviews with Welsh speakers to allow for such a comparison of results.

The table below details the number of Welsh speaker interviews achieved and the weight that was applied to these respondents when looking at results at the total level and within Wales as a region.

	Achieved	Weighted
<i>Total sample size</i>	2,195	2,198
Total Welsh population	10%	5%
Welsh speakers	5%	1%
Non-Welsh speakers	4%	4%

⁴⁰ Figures subject to data rounding.

Minimum sample and booster quotas

In order to allow for analysis amongst a number of niche audiences, two minimum sample quotas and boosters were put in place for weekly local website visitors and monthly local TV channel viewers. When conducting analysis these booster interviews were only included within relevant sub-group analysis and excluded from analysis at a total level.

The table below illustrates the quotas/boosters put in place for these niche audiences.

	Achieved in main survey sample	Sample Boost	Total interviews
Weekly local website visitors	158	82	240
Monthly local TV channel viewers ⁴¹	79	96	175

8.2 RESEARCH CONSIDERATIONS

When conducting research relating to new product usage it is important to be aware of the limitations that exist in predicting likely uptake of the service concerned. Below are the key considerations to be aware of when aiming to predict take-up of a given service:

The survey results presume 100% awareness of the service or product

- During the survey all respondents were introduced to the BBC Local Video service and therefore, every respondent we spoke to were made aware of the service. In reality, it is unlikely that the whole population would be aware of the service and, therefore, take-up would likely be lower all other things remaining equal

During the survey all respondents are made aware of the service in the same way

- All survey respondents were presented the concept via a video clip and summary introduction in their homes, i.e. a consistent introduction experience. In reality, those who are aware of the service would be made aware of the service via a range of media channels and/or potential communication from peers. How the service is communicated and by whom would have an impact on the likelihood of someone to try the service

Survey results presume competition/alternatives would be the same as at the time of the survey

- The survey results are based on a snapshot in time, it is likely that new and alternative local media services would become available or change in the future and this competition for viewing time would likely impact the use the BBC Local Video service

Survey results are based on the concept presented during the survey

- The concept presented and the final service or product often differ in terms of the overall offering and execution. This would have a subsequent impact on the likelihood to take up the service as different features and content would change the level of appeal

⁴¹ All local TV channel booster interviews were conducted with Channel M viewers.

8.3 LISTS OF LOCAL MEDIA SERVICES REFERENCED⁴²

Selection of local commercial radio stations mentioned by respondents

The list below is a selection of the local commercial radio stations mentioned by survey respondents.

Angel Radio	Fire Radio	Minster FM
Argus	Forth One	Nevis Radio
Atlantic FM	Fosseway Radio	North Sound 1
The Bay	Fox FM	North Sound 2
Beacon Radio	Force FM	Northants 96 FM
BRMB	Galaxy FM	RAM FM
CFM radio	My Gold Music	Oak FM
Capital Radio	Hallam FM	Ocean FM
Capital Gold	Heartbeat FM	Real Radio
Carmarthen Radio	Heart FM	Red Dragon
Century Radio	Hereford FM	Rock Radio
Champion 103	Highland Radio	Thameside Radio
Champion FM	Horizon Radio	Telford FM
Choice FM	Invicta FM	Trent FM
Citybeat	Island FM	Scarlet FM
City Talk	Jack FM	Seven FM
Clanrye Radio	Radio Jackie	Severn Sound
Classic FM	Juice FM	SGR Colchester
Classic Hits Radio	K.C FM 99.8	Shankill Radio
Cool FM	Key 103	Signal Radio
Delta Radio	Kingdom FM	Silk City
Downtown Radio	Leicester Sound	Smooth FM
96.4 Eagle	Magic FM	Spirit FM
Easy Digital Radio	Manx Radio	Swansea Sound
Energy FM	Marcher Sound	Viking FM
Essex FM	Mercia	Wave 105 FM

⁴² Recorded via open-ended responses, may be subject to spelling errors.

Selection of local newspapers mentioned by respondents

The list below is a selection of the local newspapers mentioned by survey respondents. Note that respondents who only mentioned national newspapers were removed from analysis.⁴³

Aberdeen Evening Express	Felixstowe Flyer	Penrith Herald
Anderstown News	Felixstowe Focus	Prestwich Advertiser
Antrim Times	Gazette	The Portsmouth News
Avon Advertiser	Goole Courier	Sheffield Star
Ballymena Guardian	Goole Times	Shepshed Echo
Banbridge Chronicle	Guernsey Press	ShIPLEY Target
Bangor Chronicle	Halesowen news	Shopshire Star
Belfast Telegraph	Hampshire Chronicle	Selby Star
Birmingham Mail	Hull Daily Mail	Selby Times
Bridgnorth Journal	Ilford Recorder	South Liverpool Merseymart
Cambrian News	Lea Valley Star	South Wales Echo
Colchester Weekly News	Leeds Weekly News	South Wales Evening Post
Cornish Guardian	Leicester Mercury	Ulster Star
The Cornishman	Lincolnshire Free Press	Worcester News
Cumberland News	Lisburn Today	West Lothian Courier
Metro	Liverpool Echo	West Sussex Gazette
Daily Post	Llanelli Daily Post	Wharfe Valley Times
Daily Record	Llanelli Star	
Derry Journal	Lochaber News	
Derby Telegraph	London Lite	
Derry Journal	London Metro	
Derry News	Lurgan Mail	
East Anglian Daily Times	Manchester Evening News	
Echo News	OBAN Times	
Enfield Gazette	Okehampton Times	
Express & Star	Oldham Chronicle	
Falkirk Advertiser	Oxford Mail	
Falkirk Herald	Oxford Star	
Fenland Citizen	Oxford Times	

⁴³ List excludes generic mentions, eg 'the Post', 'the Mail', 'the Times', 'the Journal', etc. Full list included more than 200 titles. Recorded via open-ended responses, may be subject to spelling errors.

Selection of local websites mentioned by respondents

The list below is of the local websites mentioned by survey respondents.⁴⁴

2 Ten.FM	Meridian
Anglia News.com	Metro
Caernarfon on line	My Reading
Cambs Times	News now
County Times	Oak FM
Didcot Herald	PowerFM
EveningGazette	South Wales Evening Post
Get Reading	South Wales
Guernsey press	The Southern Reporter
Haslemere.com	Sunderland Echo
Heart FM	ThisisGuernsey.com
Liverpool City Council	ThisisNottingham.co.uk
Liverpool Daily Post	UTV
Liverpool Echo	Wave 105.com
Manx	

Local TV channels

The list below is of the local TV channels that were classified as 'Local' within the survey. Significant numbers mentioned regional TV channels within the survey but these were removed from the analysis.

Capital TV - Cardiff
Channel Seven (Cable in Immingham – North/North East Lincolnshire)
MATV - Leicester
Channel M, the channel about the Manchester area ⁴⁵
Northern Visions/NvTv - Belfast
Six TV Oxford
Six TV Southampton

⁴⁴ Recorded via open-ended responses, may be subject to spelling errors.

⁴⁵ All booster interviews for monthly local TV viewers were conducted amongst Channel M viewers

9 APPENDIX 3 - REGRESSION ANALYSIS

REGRESSION MODELLING OVERVIEW

In order to inform Ofcom's modelling approach regression analysis⁴⁶ of the market research results was conducted to identify whether certain variables, such as demographic factors (age, gender, etc), explained in each of the 60 areas the likely take-up and impact (on each of the affected services) of the proposed BBC service. If so, then these variables could be used in the modelling approach to derive take-up and impact estimates.

The geographic and demographic variables for which data was available in each of the 60 areas were:

- Take-up: gender, age, rural/urban classification, social grade, Government Office region, education attainment and children in the household
- Impact: gender, age, social grade, rural/urban classification and Government Office region

Four regression analyses on the market research results were conducted:

- An analysis of likely take-up based on all the local media consumption and demographic variables included in the survey
- An analysis of likely take-up based on the geographic and demographic variables identified above
- An analysis of likely take-up based on the attitudinal variables based on attitudinal statements from the survey
- An analysis of likely impacts based on the geographic and demographic variables identified above

Overall, the models for take-up and impact had a very low predictive power. This means that the variables did not explain take-up or impact to any significant extent. As a result they were not used in Ofcom's modelling approach to estimate take-up or impact individually for each of the 60 regions.

Nevertheless, the regression models provided a valuable insight into the demographics and attitudes that affect the likelihood of take-up and potential impact. The results showed that a more complex relationship exists between current usage of the internet, regional appetite for local news and relationship with the BBC than can be captured in simplistic regression models.

⁴⁶ Regression analysis is a statistical technique used to analyse numerical data on a dependent variable (in this case, take-up or impact) and one or more independent variables (also known as explanatory variables or predictors). In a regression equation, the dependent variable is modelled as a function of the independent variables. In this instance, the analysis looked at the degree to which the independent variables explained or predicted the take-up or impact of the proposed BBC service.

Specifically, the key variables identified were Government Office region, urban/rural classification, use of current local news websites, experience of downloading video, text, pictures, etc online, reading a local newspaper, an interest in more and/or more in-depth local news and use of the BBC News website. Differences by Government Office region and rural/urban classification, which we had data available for each of the 60 areas, were incorporated into Ofcom's modelling approach.

METHODOLOGY AND RESULTS

A large sample of broadband users were recruited as part of the market research sample design (1,625), across all of the 60 geographic service areas, to provide a database to enable regression modelling of take-up and impact among the broadband population.

Demographic questions were asked in the survey in a manner consistent with the ONS census so that the survey results and regression analysis could be directly related to the available data for each of the 60 areas.

Four separate regression modelling exercises were undertaken with the relevant broadband data.⁴⁷ These models and their objectives are set out below:

Model 1: Take-up – Full (with all demographic and usage variables on the questionnaire)

- Objective: To compare the potential loss in predictive power caused by restricting variables, and to investigate the comparative influence of other variables

Model 2: Take-up – Restricted (with only the demographics variables for which data was available in each of the 60 areas)

- Objective: To provide a socio-demographic take-up equation to be integrated into an area by area take-up model

Model 3: Take-up – Attitudinal (with only attitudinal statements and use of the BBC News Website)

- Objective: To test hypothesis that the presence of the Government Office variables in the demographic models, are capturing some regional attitudinal differences

Model 4: Impact – ITV regional news

- Objective: To test the feasibility of achieving a predictive impact regression, on the largest user group (with largest absolute numbers of impacted respondents), before proceeding to other media types

⁴⁷ This analysis was undertaken by Digitab and SPA in July/August 2008

None of the above models achieved sufficient predictive accuracy to be used directly in the modelling. However, together with the general findings from the market research survey⁴⁸, the regression analysis highlighted consistent factors and demographics that influence take-up. The predictive power and significant variables achieved for each model were:

Model 1: Take-up – Full

- Predictive power of 68%
- Variables: Use the internet, Visit websites with local news, Read a local newspaper, Watch ITV regional news, Government Office region

Model 2: Take-up – Restricted

- Predictive power of 62%
- Variables: Age 55+, Social Grade AB, Tertiary Education, Government Office region

Model 3: Take-up – Attitudinal

- Predictive power of 62%
- Variables: Use of BBC News Website, Disagree – Enough Local News stories, Don't pay attention to Local News, Agree – Interest in more in-depth news coverage

Model 4: Impact – ITV regional news

- Predictive power cannot be calculated ($R^2 < 0.05$)
- Variables: Urban/Rural, Government Office region

TAKE-UP

The modelling objective was to predict take-up of the new service, based on a full model using the full range of demographic and other media usage factors available from the questionnaire, and a restricted model based only on the demographic factors available in the 60 areas.

For all take-up models a binary variable was used to predict those likely to take up the new service. Modelling was performed on the full unweighted broadband user dataset.

Both demographic take-up models were conducted using a forward-stepwise logistic regression. The model starts with a constant, adding a single variable at a time to the model in order of their impact on the predictor variable (QD1)⁴⁹. The logistic regression proceeds until none of the remaining independent variables have a significant impact on the accuracy of the prediction (the cut-off point significance level was set to 5%).

⁴⁸ See: *Research into the expected take-up and impact of a proposed BBC Local Video service*, a quantitative research report by SPA prepared for Ofcom, 27 November 2008.

⁴⁹ QD1. How likely would you be to use this local video service from the BBC? Binary variable coded: 0 = those who said they would definitely/probably not use, 1 = for those who said they would definitely/probably use.

MODEL 1: TAKE-UP - USING ALL THE SURVEY DEMOGRAPHIC AND ATTITUDINAL VARIABLES

The total number of available variables was too large to include in one regression, so the independent variables were restricted first by considering the strength of their relationship (correlation) with the likely take-up of the new service. Only those variables with a significant correlation (at the 95% level) were included in the potential variable list. This resulted in 104 variables being identified. However the highest correlation achieved was 0.24, and the majority were under 0.10, indicating a relatively weak relationship with the likely take-up (a strong correlation is indicated by values in the region of 0.6 or above).

One of the primary assumptions when undertaking a regression is the lack of correlation amongst the independent variables. Factor analysis was undertaken to help identify variables with the least correlation amongst them, by selecting only one variable from each component or factor. From a 29 component factor analysis, 26 independent variables were selected to test in the regression model.

The model with the highest predictive accuracy achieved is shown in Table A3.1 below.

The variables included in the model indicate that current use of local websites, readership of a local paper, watching regional news, and adjustment for regional differences are predictors of likely take-up of the new service.

The R² values (a measure of explanatory power) and the resultant low predictive power, 18% above random, indicate that demographics and usage on their own do not adequately capture the drivers of take-up of the new service.

Table A3.1: Full forward logistic regression model results

Survey question/variable	B	S.E.	Signif	Exp(B)
Qb1b. Visit websites with local news - Net: At least weekly	1.347	0.168	0.000	3.845
Qb1b. Read a local newspaper - Net: At least weekly	0.456	0.114	0.000	1.578
Qb1b. Watch ITV regional news on TV - Net: At least weekly	0.483	0.151	0.001	1.621
Qe14. Government Office area - North East	-0.555	0.232	0.017	0.574
Qe14. Government Office area - Yorkshire and The Humber	-0.776	0.227	0.001	0.460
Qe14. Government Office area - East Midlands	0.578	0.211	0.006	1.783
Qe14. Government Office area - South East	0.857	0.191	0.000	2.356
Qe14. Government Office area - South West	0.978	0.230	0.000	2.660
Qe14. Government Office area – Wales	0.403	0.179	0.024	1.496
Qe14. Government Office area – Scotland	-0.531	0.174	0.002	0.588
Qa5b. If any, do you ever use the Internet for - Net: Any media	0.829	0.106	0.000	2.292
Constant	-1.662	0.176	0.000	0.190

Cox & Snell R² = 0.145, Nagelkerke; R² = 0.195, Classification 68.36

Note: B = log coefficient (as logistic regression), S.E. = standard error, Signif = the statistical significance of the variable in the model (<0.05), Exp(B) = linear coefficient.

MODEL 2: TAKE-UP - USING THE GEOGRAPHIC AND DEMOGRAPHIC VARIABLES FOR WHICH DATA WAS AVAILABLE

A similar logistic regression was undertaken with only those independent variables for which data was available for each of the 60 areas. There were 25 independent variables, from the following socio-demographic categories: sex, age, rural/urban classification, social grade, Government Office region, education, children in the household.

The model with the highest predictive accuracy achieved is shown in Table A3.2 below.

The alternative variables included in the model with the removal of current media usage variables, indicate some demographics factors; Age 55+, AB social grade, Tertiary education, alongside regional adjustment can help predict likely take-up of the new service.

A predictive power of 62% was achieved with the restricted variables, which is 12% above random and lower but similar to the 68% achieved with all available demographic and usage variables reported above.

Table A3.2: Restricted forward logistic regression model results

Survey question/variable	B	S.E.	Signif	Exp(B)
E2 Age 55+	-0.348	0.128	0.006	0.706
Qe11. Social Grade – Net: AB	0.332	0.113	0.003	1.394
E9 Education – Tertiary	0.223	0.107	0.037	1.250
Qe14. Government Office area - North East	-0.770	0.222	0.001	0.463
Qe14. Government Office area - Yorkshire and The Humber	-0.538	0.212	0.011	0.584
Qe14. Government Office area - East Midlands	0.444	0.203	0.029	1.559
Qe14. Government Office area - East of England	-0.489	0.227	0.031	0.613
Qe14. Government Office area - South East	0.862	0.185	0.000	2.368
Qe14. Government Office area - South West	0.719	0.220	0.001	2.052
Qe14. Government Office area – Wales	0.356	0.173	0.040	1.428
Qe14. Government Office area – Scotland	-0.591	0.168	0.000	0.554
Constant	-0.396	0.093	0.000	0.673

Cox & Snell $R^2 = 0.063$, Nagelkerke; $R^2 = 0.085$, Classification 62.38

Note: B = log coefficient (as logistic regression), S.E. = standard error, Signific = the statistical significance of the variable in the model (<0.05), Exp(B) = linear coefficient.

MODEL 3: TAKE-UP – BASED ON ATTITUDINAL VARIABLES FROM THE SURVEY

Demographic based regression models did not provide a sufficient level of predictive power, for either take-up of the new service or the impact of the new service on consumption. The presence of the Government Office region variable in both these models, ahead of demographics indicated that attitudinal differences were implicit in the regional variables.

The predictive power of attitudinal statements, were investigated by undertaking a linear regression (OLS - Optimising Least Squares) to predict users of the new service. Current use of the BBC News website was included as a proxy for a measure of an existing positive attitude towards the BBC online.

The variables in the model indicate that an interest in additional local news coverage and a relationship with the BBC online can explain some of the predicted take-up of the new service. Attitudinal variables have a similar explanatory power in the absence of Government Office region, and demographics.

This simple regression achieved a low predictive power similar to both the full and restricted factor take-up models of 62% outlined above. An interest in additional local news coverage and a relationship with the BBC online do not explain take-up sufficiently on their own.

Table A3.3: Attitudinal linear regression model results

Survey question/variable	B	S.E.	t	Signif
Qc5 = More in-depth news	0.108	0.011	10.013	0.00
Qc5 = Don't pay attention to local news	-0.057	0.011	-5.362	0.00
Qc1 = BBC News Website	2.41	0.046	5.278	0.00
Qc4 = Enough local news stories	-0.058	0.28	-2.097	0.022
Constant	0.276	0.052	5.353	0.00

R = 0.346; R² = 0.118

Note: B = coefficient, S.E. = standard error, t = t test statistic, Signif= the statistical significance of the variable in the model (<0.05)

MODEL 4: IMPACT – BASED ON DEMOGRAPHIC VARIABLES

The objective of the impact regression model was to predict the impact, in terms of a reduction or increase in usage for each of the potentially affected media services. This required a two stage regression model of take-up of the new service and impact on the specified media service.

Current media consumption data, used in assessment of the potential impact of the service in each of the 60 areas, was only available for a limited number of demographic variables. This restricted any combined take-up and impact regression model to a limited number of factors: sex, age, urban/rural, Government Office region.

As the restricted take-up regression model indicated, that the demographic variables did not adequately explain take-up, a two stage predictive impact model with only reduced demographic variables was unlikely to have significant predictive power.

A range of two stage logistic regressions were undertaken, with alternative stages and dependent variables, to predict the impact of the new service on current viewers of ITV Regional news.

Only urban/rural classification and individual Government Office region variables were significant at any stage of the regression analysis, with no more than three independent variables in total. The highest R² value was under 0.05, so no predictive power was calculated.

Analysis was therefore not extended to other media services, with lower absolute numbers of impacted respondents, as there was likely to be a further decreased probability of success.

10 APPENDIX 4 - SURVEY QUESTIONNAIRE

SCREENING

ASK ALL

QS1. Do you or anyone who lives with you work in any of the following industries or occupations?

READ OUT. MULTICODE OK

Market Research	1	CLOSE
TV or the Media	2	CLOSE
Journalism	3	CLOSE
None of the above	4	CONTINUE

ASK ALL

QS2. Which of the following types of Internet access, if any, do you have?

READ OUT. MULTICODE OK

Do not have Internet access	1	CHECK QUOTA
Dial up	2	
Broadband at home	3	CHECK QUOTA
Broadband at work	4	
Mobile broadband i.e. broadband via a USB device from a mobile network	5	
None	6	CHECK QUOTA

INTERVIEWER TO CODE FOR ALL – CHECK QUOTAS WITH SUPERVISOR

QS3. URBAN/RURAL DEFINITION

DO NOT READ OUT. SINGLECODE

Urban areas	1	CHECK QUOTA
Small towns in less sparsely populated areas	2	CHECK QUOTA
Villages in less sparsely populated areas	3	CHECK QUOTA
Dispersed dwellings in less sparsely populated areas	4	CHECK QUOTA
Sparsely populated rural areas	5	CHECK QUOTA

ASK ALL IN WALES ONLY, BOOSTER INTERVIEWS TO QS5, OTHERS TO SECTION A
QS4. Which of the following statements best describes your own use of the Welsh language?
 SHOWCARD A. SINGLECODE

I can understand, speak, write and read Welsh EXTREMELY WELL	1	MONITOR (MAIN SAMPLE) CHECK QUOTA (BOOSTER)
I can understand, speak, write and read Welsh QUITE WELL	2	
I can understand, speak, write and read A LITTLE Welsh	3	
I can understand and speak SOME Welsh	4	
I can understand A LITTLE Welsh	5	
I have NO understanding of Welsh	6	

BOOSTER SCREENING

ASK QS5-Q6 FOR BOOSTER INTERVIEWS ONLY

ASK ALL BOOSTER INTERVIEWS, OTHERS TO SECTION A
QS5. Which of the following do you typically do each week?
 SHOWCARD B. MULTICODE OK

Listen to a local commercial radio station	1	CHECK BOOSTER QUOTA
Read a local newspaper	2	CHECK BOOSTER QUOTA
Visit local <u>newspaper</u> websites	3	CHECK BOOSTER QUOTA
None of these	4	CLOSE <u>FOR BOOSTER ONLY</u>

ASK ALL IN MANCHESTER ONLY, OTHERS TO SECTION A
QS6. How often, if at all, do you currently watch Channel M, the TV channel about Manchester?
 SHOWCARD C. SINGLECODE

Daily	1	CHECK BOOSTER QUOTA
Once a week or more	2	
2 or 3 times a month	3	CLOSE <u>FOR BOOSTER ONLY</u>
Once a month	4	
Less often	5	
Never	6	

LOCAL DEFINITION – IMPORTANT

READ OUT: During this interview I will often refer to ‘local’ news and content. When I mention ‘local’ this will always refer to your current local area, by which I mean [READ OUT APPROPRIATE LOCAL AREA FROM LIST]. Please bear this in mind when answering these questions.

SECTION A – GENERAL MEDIA CONSUMPTION

ASK ALL

QA1. Which of the following, if any, do you have in your household and personally use yourself?

SHOWCARD D. MULTICODE OK

A Radio (FM radio or DAB digital radio)	1
Personal computer (not laptop)	2
Laptop computer	3
Mobile phone	4
Personal Digital Assistant (PDA) (e.g. palm, Blackberry)	5
A Digital TV recorder, eg Sky+, V+, BT Vision, Freeview playback, etc	6
An MP3 player, eg an iPod	7
A portable personal media player that plays video, eg iPod Touch, Archos, etc	8
None of these	9

ASK ALL

QA2. On average, how many hours per day do you spend doing each of the following?

SHOWCARD E. READ OUT. SINGLECODE FOR EACH

	Watching TV	Listening to Radio	Using the Internet	Reading Newspapers (Paper copy)	Visiting Newspaper websites
Never do this	1	1	1	1	1
Less than 1 hour	2	2	2	2	2
Between 1 and 3 hours	3	3	3	3	3
Between 3 and 5 hours	4	4	4	4	4
More than 5 hours	5	5	5	5	5
Don't Know	6	6	6	6	6

ASK ALL

QA3. Do you watch any local area TV channels focussed on your local area?

PROMPT: By this I am referring to a specific local TV channel rather than any local programming on national or regional TV channels.

IF SO: Which do you watch?

MULTICODE OK

Capital TV - Cardiff	1
Channel Seven (Cable in Immingham – North/North East Lincolnshire)	2
MATV - Leicester	3
Channel M, the channel about the Manchester area	4
Nothern Visions/NvTv - Belfast	5
Six TV Oxford	6
Six TV Southampton	7
Other	8
Do not watch local TV channels	9

ASK ALL WITH A MOBILE PHONE (QA1 = 4), OTHERS TO QA5B

QA4. Do you ever watch video online using your mobile phone? READ OUT: This would be video you view via mobile Internet or download using your mobile rather than video taken by you or someone you know.

SINGLECODE

Yes	1
No	2
Don't know	3

QA5a. And, which of the following, if any, do you ever do with your mobile phone?

READOUT. MULTICODE OK

PROMPT IF NECESSARY: This could be by downloading to watch later or streaming live.

ASK ALL WITH INTERNET ACCESS (QS2 = 2,3,4,5), OTHERS TO SECTION B1

QA5b. Which of the following, if any, do you ever use the Internet for?

SHOWCARD F. MULTICODE OK

	QA5a. Mobile	QA5b. Internet
Listening to music e.g. mp3's, radio, etc	1	1
Listening to audio (excluding music) e.g. speech based radio programme, podcasts, etc	2	2
Watching video clips online, eg YouTube	3	3
Watching TV programmes	4	4
None of these	5	5

ASK ALL WITH BROADBAND INTERNET ACCESS AT HOME (QS2 = 3), OTHERS TO SECTION B1
QA6. How long have you had a broadband Internet connection in your home?
 SINGLECODE

Less than 6 months	1
Between 6 months and 1 year	2
Between 1 and 2 years	3
Between 2 and 3 years	4
More than 3 years	5
Don't know/Can't recall	6

SECTION B.1 – LOCAL MEDIA CONSUMPTION

I am now going to ask you some questions about local news and media in your current local area.
 Again, by 'local' I mean specifically about [READ OUT RELEVANT LOCATION FROM LIST]

ASK ALL

QB1A. Which of the following types of local media content, if any, do you read, watch or listen to at least monthly?

SHOWCARD G. MULTICODE OK

Local news stories	1
Local sports news	2
Local travel news	3
Local weather	4
Local life & community stories ('eg. local stories on history or nature')	5
None of these	6
Don't know	7

ASK ALL

QB1B. On average, how often do you do each of the following...?

SHOWCARD H. READ OUT. SINGLECODE FOR EACH

	More than once a day	About once a day	About once a week or more	2 to 3 times per month	About once a month	Less often	Never
Listen to a local commercial radio station	1	2	3	4	5	6	7
Read a local newspaper	1	2	3	4	5	6	7
Watch ITV regional news on TV	1	2	3	4	5	6	7
Visit websites with local news*	1	2	3	4	5	6	7
Access local news on mobile phone	1	2	3	4	5	6	7
VIEWERS ONLY AT QA3: Watch a local TV Channel	1	2	3	4	5	6	7
Watch local news videos via the Internet	1	2	3	4	5	6	7

*EXAMPLES OF LOCAL WEBSITES: ITV LOCAL, LOCAL COMMERCIAL RADIO WEBSITES, LOCAL NEWSPAPER WEBSITES, ETC.

ASK ALL WITH BROADBAND ACCESS AT HOME FOR LESS THAN 2 YEARS (QA6 = 1,2 or 3), OTHERS TO SECTION B2

QB1C. Since you have had broadband Internet access at home, would you say you do each of the following more, less or about the same amount as previously?

SHOWCARD I. READ OUT. SINGLECODE FOR EACH

	Do more	Do about the same amount	Do less	Don't use/not applicable
Listen to a local commercial radio station	1	2	3	4
Read a local newspaper	1	2	3	4
Watch ITV regional news on TV	1	2	3	4
Visit websites with local news	1	2	3	4
Access local news on mobile phone	1	2	3	4
VIEWERS ONLY AT QA3: Watch a local TV Channel	1	2	3	4
Watch local news videos via the Internet	1	2	3	4

SECTION B.2 – LOCAL COMMERCIAL RADIO

ASK SECTION B2 TO ALL LISTENING TO LOCAL COMMERCIAL RADIO AT LEAST WEEKLY (QB1B = 1-3), OTHERS TO ROUTING AT SECTION B3

READ OUT: I am now going to ask some questions about local commercial radio for [READ OUT LOCAL AREA FROM LIST]. When I refer to commercial radio this means radio stations with adverts and not those provided by the BBC.

QB2A. Which local commercial radio stations do you listen to in a typical week?
OPENENDED. WRITE IN

WRITE IN TITLE	
1.	1
2.	2
3.	3
4.	4
5.	5
6.	6
7.	7
8.	8
9.	9
10.	10
TOTAL NUMBER OF STATIONS (WRITE IN USING LEADING ZEROS)	_____

QB2B. In a typical week, how much time do you spend listening to local commercial radio stations on each of the following days?
SHOWCARD J. SINGLECODE

	On an average Weekday	Saturdays	Sundays
Do not listen	1	1	1
Less than 15 minutes	2	2	2
Between 15 and 30 minutes	3	3	3
Between 30 and 60 minutes	4	4	4
Between 1 and 2 hours	5	5	5
More than 2 hours	6	6	6
Don't know/Can't recall	7	7	7

QB2C. Which of the following types of local content do you choose to listen to via commercial radio in a typical week?

SHOWCARD K. MULTICODE OK. PROBE EACH IN TURN & PROBE ANY OTHERS.

Local news stories	1
Local sports news	2
Local travel news	3
Local weather	4
Local life & community stories ('eg. local stories on history or nature')	5
Event listings	6
Celebrity gossip	7
Phone-ins	8
Other (Specify)	9
None of these	10
Don't Know	11

QB2D. In which of the following ways do you currently listen to commercial local radio?

SHOWCARD L. MULTICODE OK

Radio (FM radio or DAB digital radio)	1
Online via a personal computer (not laptop)	2
Online via a laptop computer	3
Via mobile phone	4
Via Personal Digital Assistant (PDA) (e.g. palm, Blackberry)	5
Via TV	6
Other method (Please specify)	7

SECTION B.3 – LOCAL NEWSPAPERS

ASK SECTION B3 TO ALL WHO READ LOCAL NEWSPAPERS AT LEAST WEEKLY (QB1B = 1-3), OTHERS TO ROUTING AT SECTION B4

READ OUT: I am now going to ask some questions about local newspapers for [READ OUT LOCAL AREA FROM LIST]. When I refer to local newspapers this can include both free papers and those you pay for.

QB3A. i) Which local newspapers do you read in a typical week?
OPEN ENDED

ASK FOR EACH NEWSPAPER MENTIONED

QB3A. ii) Is that a daily or weekly published newspaper? SINGLECODE

ASK FOR EACH NEWSPAPER MENTIONED

QB3A. iii) And is that a free newspaper or one you pay for? SINGLECODE

QB3A i) WRITE IN TITLE	QB3A ii)		QB3A iii)	
	Daily	Weekly	Free	Paid
1.	1	2	1	2
2.	1	2	1	2
3.	1	2	1	2
4.	1	2	1	2
5.	1	2	1	2
6.	1	2	1	2
7.	1	2	1	2
8.	1	2	1	2
9.	1	2	1	2
10.	1	2	1	2
TOTAL NUMBER OF LOCAL NEWSPAPERS BY TYPE (WRITE IN USING LEADING ZEROS)	— — —	— — —	— — —	— — —

QB3B. In a typical week, how much time do you spend reading local newspapers on each of the following days?

SHOWCARD M. SINGLECODE FOR EACH

	On an average Weekday	Saturdays	Sundays
Do not read	1	1	1
Less than 15 minutes	2	2	2
Between 15 and 30 minutes	3	3	3
Between 30 and 60 minutes	4	4	4
Between 1 and 2 hours	5	5	5
More than 2 hours	6	6	6
Don't know/Can't recall	7	7	7

ASK ALL WHO READ EACH TYPE OF LOCAL NEWSPAPERS AT QB3A, OTHERS TO SECTION B4

QB3C. What do you typically read in each of the following type of local newspaper?

SHOWCARD N. MULTICODE OK.

ONLY ASK FOR EACH TYPE OF PAPER CODED AT QB3Aii/iii

	Daily Free	Daily Paid	Weekly free	Weekly paid
Local news stories	1	1	1	1
Local sports news	2	2	2	2
Local travel news	3	3	3	3
Local weather	4	4	4	4
Local life & community stories ('eg. local stories on history or nature')	5	5	5	5
Event listings	6	6	6	6
Reviews of local shows/events	7	7	7	7
Horoscopes	8	8	8	8
Classifieds	9	9	9	9
Births/deaths/marriages	10	10	10	10
Celebrity gossip	11	11	11	11
Readers letters	12	12	12	12
TV listings and information	13	13	13	13
Other (specify)	14			
		14		
			14	
				14
Do not read	15	15	15	15
Don't know	16	16	16	16

SECTION B.4 – ITV REGIONAL NEWS

ASK SECTION B4 TO ALL WHO WATCH ITV REGIONAL NEWS AT LEAST WEEKLY (QB1B = 1-3), OTHERS TO ROUTING BEFORE SECTION B5

READ OUT: I am now going to ask some questions about your viewing of ITV regional news.

QB4A. In a typical week, how much time do you spend watching ITV regional news on each of the following days?

SHOWCARD O. SINGLECODE

	On an average Weekday	Saturdays	Sundays
Do not watch	1	1	1
Less than 15 minutes	2	2	2
Between 15 and 30 minutes	3	3	3
Between 30 and 60 minutes	4	4	4
Between 1 and 2 hours	5	5	5
More than 2 hours	6	6	6
Don't know/Can't recall	7	7	7

QB4B. Which of the following types of local content do you typically watch on ITV regional news?

SHOWCARD P. MULTICODE. PROBE EACH IN TURN.

Local news stories	1
Local sports news	2
Local travel news	3
Local weather	4
Local life & community stories ('eg. local stories on history or nature')	5
None of these	6
Other (specify)	7
Don't Know	8

QB4C. How do you watch ITV regional news? PROBE: Any other method?

SHOWCARD

Q.

MULTICODE

Via TV	1
Online via a personal computer (not laptop)	2
Online via a laptop computer	3
Via mobile phone	4
Via Personal Digital Assistant (PDA) (e.g. palm, Blackberry)	5
Other method (specify)	6

SECTION B.5 – LOCAL WEBSITES

ASK SECTION B5 TO ALL WHO VISIT WEBSITES FOR LOCAL NEWS AT LEAST WEEKLY (QB1B = 1-3), OTHERS TO ROUTING BEFORE SECTION B6

READ OUT: I am now going to ask some questions about local websites for [READ OUT LOCAL AREA FROM LIST]. These include any websites you visit that include local news coverage including news, travel updates, sport, weather, etc

QB5A. Which of the following types of local website do you access in a typical week?
SHOWCARD R. MULTICODE

Local newspaper websites	1
Local commercial radio station websites	2
ITV local websites	3
BBC local (formerly 'Where I live') websites	4
Other type of local websites (specify)	5

QB5Bi. And which specific websites containing local news, weather, travel, sport etc. do you visit in a typical week? OPEN-ENDED

FOR EACH ANSWER GIVEN:

QB5Bii. And what type of website is that? SHOWCARD R AGAIN. SINGLECODE

FOR EACH ANSWER GIVEN:

QB5Biii. And, do you watch video clips on this site? SINGLECODE

QB5Bi	QB5Bii					QB5Biii
WRITE IN WEBSITE	Local newspaper website	Local commercial radio station website	ITV local website	BBC local website (formerly 'Where I live')	Other type of local website	QB5Bi Video
1.	1	2	3	4	5	Y / N
2.	1	2	3	4	5	Y / N
3.	1	2	3	4	5	Y / N
4.	1	2	3	4	5	Y / N
5.	1	2	3	4	5	Y / N
6.	1	2	3	4	5	Y / N
7.	1	2	3	4	5	Y / N
8.	1	2	3	4	5	Y / N
9.	1	2	3	4	5	Y / N
10.	1	2	3	4	5	Y / N
TOTAL NUMBER OF WEBSITES (WRITE IN USING LEADING ZEROS)	_ _ _	_ _ _	_ _ _	_ _ _	_ _ _	_ _ _

QB5C. Which of the following types of local content do you typically access on local websites?

SHOWCARD S. MULTI-CODE OK

Local news stories	1
Local sports news	2
Local travel news	3
Local weather	4
Local life & community stories ('eg. local stories on history or nature')	5
Event listings	6
Horoscopes	7
Classifieds	8
Blogs	9
Other (Specify)	10
Not used	11

QB5D. And in what format do you view content on local websites in a typical week?

READ OUT AND PROBE. MULTI-CODE OK

Text	1
Pictures	2
Audio	3
Video	4
Not used	5

QB5E. How do you typically view local websites?

SHOWCARD T. MULTICODE OK

Online via a personal computer (not laptop)	1
Online via a laptop computer	2
Via mobile phone	3
Via Personal Digital Assistant - PDA (e.g. palm, Blackberry)	4
Other method (specify)	5

QB5F. In a typical week, how much time do you spend visiting local websites for news on the following days? Please do not include any time spent visiting BBC websites in your answers.

SHOWCARD U. ASK FOR EACH DAY TYPE. SINGLECODE

	On an average Weekday	Saturdays	Sundays
Do not visit local websites (Non BBC)	1	1	1
Less than 15 minutes	2	2	2
Between 15 and 30 minutes	3	3	3
Between 30 and 60 minutes	4	4	4
Between 1 and 2 hours	5	5	5
More than 2 hours	6	6	6
Don't know/Can't recall	7	7	7

ASK ALL WHO VISIT LOCAL NEWSPAPER WEBSITES (QB5Bii = 1), OTHERS TO QB5H
QB5G. You mentioned that you visit local newspaper websites. Do you also read the paper version (hard copy) of any of these newspapers? PROBE IF MORE THAN ONE NEWSPAPER WEBSITE VISITED. And is that for all of these newspaper sites?
 SINGLECODE

Yes, for all (CODE IF ONLY ONE SITE/PAPER MENTIONED)	1
Yes, for some	2
No	3
No paper version available	4

ASK ALL WHO VISIT LOCAL COMMERCIAL RADIO WEBSITES (QB5Bii = 2), OTHERS TO SECTION B6

QB5H. You mentioned that you visit local commercial radio websites. Do you listen to the radio station of any of these sites you visited? PROBE IF MORE THAN ONE RADIO WEBSITE VISITED. And is that for all of these sites? SINGLECODE

Yes, for all (CODE IF ONLY ONE COMMERCIAL RADIO SITE MENTIONED)	1
Yes, for some	2
No	3

SECTION B.6 – ACCESS LOCAL CONTENT ON MOBILE

ASK SECTION B6 TO ALL WHO ACCESS LOCAL CONTENT ON MOBILE AT LEAST MONTHLY (QB1B = 1-5), OTHERS TO ROUTING BEFORE SECTION B7

READ OUT: I am now going to ask some questions about accessing local news and content on your mobile phone.

QB6A. Which services do you use to access local news on your mobile phone?

OPEN ENDED

WRITE IN SERVICES USED	
1.	1
2.	2
3.	3
4.	4
5.	5
Others:	6
Can't recall	7

QB6B. In a typical week, how much time do you spend accessing local news and media on your mobile phone?

SHOWCARD V. SINGLECODE

	On an average Weekday	Saturdays	Sundays
Do not access	1	1	1
Less than 15 minutes	2	2	2
Between 15 and 30 minutes	3	3	3
Between 30 and 60 minutes	4	4	4
Between 1 and 2 hours	5	5	5
More than 2 hours	6	6	6
Don't know/Can't recall	7	7	7

QB6C. And in what format do you view local content on your mobile phone?

READ OUT. MULTICODE OK

Text	1
Pictures	2
Audio	3
Video	4

QB6D. Which of the following types of local content do you typically access on mobile phone?

SHOWCARD W. MULTI-CODE OK

Local news stories	1
Local sports news	2
Local travel news	3
Local weather	4
Local life & community stories ('eg. local stories on history or nature')	5
Event listings	6
Horoscopes	7
Classifieds	8
Blogs	9
Other (Specify)	10

SECTION B.7 – LOCAL TV CHANNELS

ASK SECTION B7 TO ALL WHO WATCH LOCAL TV CHANNELS AT LEAST MONTHLY (QA3 = 1-7 AND QB1B = 1-5), OTHERS TO SECTION B8

READ OUT: I am now going to ask some questions about local TV channels. In this region, this would be [READ OUT APPROPRIATE LOCAL CHANNEL FROM QA3]

QB7A. In a typical week, how much time do you spend watching your local TV channel, [READ OUT CHANNEL] on each of the following days?
SHOWCARD X. SINGLECODE

	On an average Weekday	Saturdays	Sundays
Do not watch local TV on this day	1	1	1
Less than 15 minutes	2	2	2
Between 15 and 30 minutes	3	3	3
Between 30 and 60 minutes	4	4	4
Between 1 and 2 hours	5	5	5
More than 2 hours	6	6	6
Don't know/Can't recall	7	7	7

QB7B. How do you typically view Local TV?
SHOWCARD Y. MULTICODE OK

Via TV	1
Online via a personal computer (not laptop)	2
Online via a laptop computer	3
Via mobile phone	4
Via Personal Digital Assistant (PDA) (e.g. palm, Blackberry)	5
Other method (Please specify)	6

QB7C. Which of the following types of content do you watch on local TV?
MULTICODE OK. PROBE EACH IN TURN.

Local news stories	1
Local sports news	2
Local travel news	3
Local weather	4
Local life & community stories ('eg. local stories on history or nature')	5
Other (Please specify)	6

SECTION B.8 – ADDITIONAL LOCAL MEDIA QUESTIONS

ASK ALL

QB8A. Imagine that you wanted to access local content. Which of the following would likely be your first source of new information from each of the following categories of local content? For [READ OUT TYPE OF CONTENT] which would you typically use first?’

SHOWCARD Z. READ OUT. SINGLECODE

USE MOST: SINGLECODE																	
Rotate order:	Local commercial radio	BBC Local radio	<u>Daily Free</u> local news-paper	<u>Weekly Free</u> local newspaper	<u>Daily paid</u> for local newspapers	<u>Weekly paid</u> for local newspapers	ITV regional news on TV	BBC regional news on TV	BBC Local website (formerly 'where I live')	Local newspaper websites	Local commercial radio website with news	Other websites with local news	Mobile internet on phone	Local TV Channel	Other Method	None	Don't Know
Local news stories	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local sports news	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local travel news	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local weather	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local life & community stories ('eg. local stories on history or nature')	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17

ASK ALL

QB8B. Which of the following would you also possibly use as sources of new information from each of the following categories of local content?

So for [READ OUT TYPE OF NEWS], which would you also use?

SHOWCARD Z AGAIN. READ OUT. MULTICODE ADDITIONAL SOURCES

USE AT OTHER TIMES: MULTICODE																	
Rotate order:	Local commercial radio	BBC Local radio	Daily Free local news-paper	Weekly Free local newspaper	Daily paid for local newspapers	Weekly paid for local newspapers	ITV regional news on TV	BBC regional news on TV	BBC Local website (formerly 'where I live')	Local newspaper websites	Local commercial radio website with news	Other websites with local news	Mobile Internet on phone	Local TV Channel	Other Method	None	Don't Know
Local news stories	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local sports news	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local travel news	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local weather	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local life & community stories ('eg. local stories on history or nature')	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17

SECTION C – BBC & LOCAL MEDIA ATTITUDES

ASK ALL

QC1. Which of the following BBC services, if any, do you use on a weekly basis for news?

SHOWCARD AA. MULTICODE OK

BBC regional television news on TV	1
BBC News Channel (formerly BBC News 24)	2
BBC national radio, eg Radio 1, etc	3
BBC digital radio channels, eg BBC6 music	4
BBC local radio	5
BBC iPlayer (bbc.co.uk/iPlayer)	6
BBC News website	7
BBC Local (formerly 'Where I live') website	8
Other BBC website (specify)	9
None of these	10

ASK ALL WHO USE BBC WEBSITES (QC1 = 6,7,8,9), OTHERS TO QC3

QC2. Do you ever follow links on BBC websites that take you to websites that are not produced by the BBC?
SINGLECODE

Yes	1
No	2
Don't know	3

ASK ALL

QC3. Generally, how important are the following types of content to you when accessing local media about [READ OUT RELEVANT LOCAL AREA]?
SHOWCARD BB. READ OUT. SINGLECODE

	Very Important	Fairly important	Not very important	Not at all important	Don't know/ No opinion
Local news stories	1	2	3	4	5
Local sports news	1	2	3	4	5
Local travel news	1	2	3	4	5
Local weather	1	2	3	4	5
Local life & community stories ('eg. local stories on history or nature')	1	2	3	4	5

ASK ALL

QC4. For each of the following types of local content, would you say that the current level of news and information available in the media is enough, or not enough?
READ OUT. SINGLECODE

	Enough	Not enough	Don't Know
Local news stories	1	2	3
Local sports news	1	2	3
Local travel news	1	2	3
Local weather	1	2	3
Local life & community stories ('eg. local stories on history or nature')	1	2	3

ASK ALL

QC5. I am now going to read out some statements about local news coverage in your current local area. Please tell me to what extent you agree or disagree with each statement.

SINGLECODE FOR EACH STATEMENT. SHOWCARD CC.

<i>CHOOSE RANDOM START POINT AND ROTATE LIST</i>	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly
I care more about local news than national news coverage	1	2	3	4	5
I don't really pay attention to local news stories	1	2	3	4	5
Not enough happens in my local area for a regular local news service	1	2	3	4	5
There is not enough news available about my local area	1	2	3	4	5
I would like to access more in-depth local news programmes	1	2	3	4	5

ASK ALL

QC6. Do you ever access local news and content about a local area that isn't [READ OUT AREA]? If yes, what area or areas of the UK is this for? READ OUT. SINGLECODE.

Yes (Specify local areas – town/city and county)	1
No	2

ASK THOSE CODING YES AT QC6, OTHERS TO SECTION D

QC7. And which of the following do you use to access news and content for these other areas?

SHOWCARD DD. READ OUT. MULTICODE

Local commercial radio station website	1
Read a local newspaper website	2
Watch ITV regional news online	3
Visit other websites with local news	4
Access local news on mobile phone	5
Watch a local TV Channel online	6
BBC Local (formerly 'Where I live') website	7
Other (specify)	8

SECTION D –BBC LOCAL VIDEO SERVICE

ASK ALL

READ OUT: I am now going to show you a video clip about a potential new local video service from the BBC. This service would be available via the Internet and mobile phone, providing news and information about your local area, [READ OUT LOCAL AREA]. The video clip I will now show you will provide details about the service – please watch the video and afterwards I will ask you some questions about the service.

[SHOW VIDEO CLIP OF BBC LOCAL VIDEO SERVICE]

Show the BBC Local Video service clip on the PDA to the respondent. Please make sure that the respondent watches the video in full and that they can see and hear the video clearly.

FOLLOWING THE VIDEO, READ OUT:

On average, up to 10 new local video stories a day will be filmed in your local area, adding up to no more than an average of 20 minutes per day. Overall, these stories will focus predominantly on news and sport. There will also be three short daily bulletins for each of news, weather and sport.

I am now going to ask you some questions about the service you have just seen/heard described.

ASK ALL

QD1 Based on the information you have just seen and heard, how likely would you be to use this local video service from the BBC if it was introduced in [READ OUT RELEVANT AREA]? Would you...?

SHOWCARD EE. SINGLECODE

Definitely use the service	1
Probably use the service	2
Probably <u>not</u> use the service	3
Definitely <u>not</u> use the service	4
Don't know	5

ASK ALL WHO WOULD PROBABLY/DEFINITELY **NOT USE** (QD1 = 3,4), OTHERS TO QD3

QD2 Why are you unlikely to use the BBC Local Video Service?
MULTICODE. PROBE FULLY.

Do not have Internet access	1
Do not know how to watch videos on the Internet	2
Have access to enough local news	3
Not interested in local news	4
Don't think it looks like a good service	5
Prefer more traditional media	6
Other (specify)	7

ASK ALL WHO WOULD DEFINITELY/PROBABLY USE BBC LOCAL VIDEO (QD1 = 1 or 2), OTHERS TO QD9C

QD3 And, how often, if at all, would you expect to use this local video service for each of the following?
SHOWCARD FF. SINGLECODE

	More than once a day	About once a day	About once a week or more	2 to 3 times per month	About once a month	Less often	Never	Don't know
Local news stories	1	2	3	4	5	6	7	8
Local sports news	1	2	3	4	5	6	7	8
Local travel news	1	2	3	4	5	6	7	8
Local weather	1	2	3	4	5	6	7	8
Local life & community stories ('eg. local stories on history or nature')	1	2	3	4	5	6	7	8

QD4 To confirm, which of the following types of local news and content would you expect to use the BBC Local Video service for?

SHOWCARD GG. SINGLECODE

Local news stories	1
Local sports news	2
Local travel news	3
Local weather	4
Local life & community stories ('eg. local stories on history or nature')	5

QD5. How much time would you expect to spend viewing the BBC Local Video service each time you accessed it?

SHOWCARD HH. SINGLECODE

Less than 5 minutes	1
Between 5 and 10 minutes	2
Between 10 and 15 minutes	3
Between 15 and 30 minutes	4
Between 30 minutes and 1 hour	5
More than 1 hour	6
Don't know/Can't recall	7

QD6a. If it was available, when and where would you expect to use the BBC Local Video service on week days (Monday to Friday)?

SHOWCARD II. MULTICODE

QD6b. And, when and where would you expect to use the BBC Local Video service on weekend days (Saturday, Sunday)?

SHOWCARD II AGAIN. MULTICODE

	QD6a. On Weekdays	QD6b. Weekend days
At home – in the morning	1	1
At home – in the afternoon	2	2
At home – in the evening	3	3
At home – at night	4	4
While commuting/travelling	5	5
While at work	6	6
Other place (please specify)	7	7

QD7. And which of the following methods do you think you would use to access the BBC Local Video service?

READ OUT. MULTICODE

Online via a personal computer (not laptop)	1
Online via a laptop computer	2
Via mobile phone	3
Via Personal Digital Assistant (PDA) (e.g. palm, Blackberry)	4
Other method (Please specify)	5

ASK ALL WHO WOULD DEFINITELY/PROBABLY USE BBC LOCAL VIDEO (QD1 = 1 or 2) AND ARE **IN WALES ONLY**, OTHERS TO QD9A

QD8. And would you prefer the content available to be provided in English, Welsh, or both?

SINGLECODE

English	1
Welsh	2
Both	3
No preference	4

ASK ALL WHO WOULD DEFINITELY/PROBABLY USE BBC LOCAL VIDEO (QD1 = 1 or 2)

QD9a. How likely is it that use of the BBC local video service would change your use of each of the following sources of local news and content?

SHOWCARD JJ. SINGLECODE FOR EACH

	Very likely	Likely	Unlikely	Very unlikely	Don't know
Local commercial radio station	1	2	3	4	5
Free daily local newspaper	1	2	3	4	5
Paid for daily local newspapers	1	2	3	4	5
Free weekly local newspaper	1	2	3	4	5
Paid for weekly local newspapers	1	2	3	4	5
ITV regional news on TV	1	2	3	4	5
Local newspaper websites	1	2	3	4	5
Local commercial radio websites with news	1	2	3	4	5
Other websites with local news	1	2	3	4	5
Local news on mobile phone	1	2	3	4	5
Local TV channels	1	2	3	4	5

ASK ALL WHO ARE VERY LIKELY OR LIKELY TO BE IMPACTED BY BBC LOCAL VIDEO SERVICE (ASK FOR EACH CODED 1 OR 2 AT QD9A), OTHERS TO QD9C

QD9b. What is the likely effect of the introduction of a BBC Local Video service on your use of the following? For each, please say whether the introduction of the service would stop you doing each or make you do each less, more or make you start using.

SHOWCARD KK. SINGLECODE FOR EACH

	Stop using	Do a lot less	Do a little less	Do a little more	Do a lot more	Start Using
Local commercial radio station	1	2	3	4	5	6
Free daily local newspaper	1	2	3	4	5	6
Paid for local newspapers	1	2	3	4	5	6
Free weekly local newspaper	1	2	3	4	5	6
Paid for weekly local newspapers	1	2	3	4	5	6
ITV regional news on TV	1	2	3	4	5	6
Local newspaper websites	1	2	3	4	5	6
Local commercial radio websites with news	1	2	3	4	5	6
Other websites with local news	1	2	3	4	5	6
Local news on mobile phone	1	2	3	4	5	6
Local TV channels	1	2	3	4	5	6

ASK ALL

QD9c. Imagine that this BBC local video service was available on the BBC Local website (formerly 'Where I live'). Thinking again about the sources you would use for local news and content, which of the following would be likely to be your first source of new information from each of the following categories of local content?

SHOWCARD LL. SINGLECODE

USE MOST: SINGLECODE																	
Rotate order:	Local commercial radio	BBC Local radio	<u>Daily Free</u> local news-paper	<u>Weekly Free</u> local newspaper	<u>Daily paid</u> for local newspapers	<u>Weekly paid</u> for local newspapers	ITV regional news on TV	BBC regional news on TV	BBC Local website (formerly 'where I live')	Local newspaper websites	Local commercial radio website with news	Other websites with local news	Mobile Internet on phone	Local TV Channel	Other Method	None	Don't Know
Local news stories	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local sports news	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local travel news	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local weather	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local life & community stories ('eg. local stories on history or nature')	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17

ASK ALL

QD9d. And which other sources of local content would you also use for each?

SHOWCARD LL AGAIN. MULTICODE

USE AT OTHER TIMES: MULTICODE																	
Rotate order:	Local commercial radio	BBC Local radio	Daily Free local news-paper	Weekly Free local news-paper	Daily paid for local news-papers	Weekly paid for local newspapers	ITV regional news on TV	BBC regional news on TV	BBC Local website (formerly 'where I live')	Local newspaper websites	Local commercial radio website with news	Other websites with local news	Mobile Internet on phone	Local TV Channel	Other Method	None	Don't Know
Local news stories	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local sports news	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local travel news	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local weather	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Local life & community stories ('eg. local stories on history or nature')	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17

ASK ALL WHO WOULD DEFINITELY/PROBABLY USE BBC LOCAL VIDEO (QD1 = 1 or 2), OTHERS TO SECTION E

QD10. What impact, if any, do you think the BBC Local Video service would have on the total amount of local content you consume? Would you...?

SHOWCARD

MM.

MULTI-CODE

Consume more local coverage of news, sport, travel, weather, etc	1
Consume about the same amount of local coverage of news, sport, travel, weather, etc	2
Consume less local coverage of news, sport, travel, weather, etc	3

SECTION E - DEMOGRAPHICS

READ OUT: To finish the survey, I would like to ask some questions about you and your household. This will allow us to understand the views of different types or people across the UK. Again all this information will remain confidential and be used for research purposes only.

ASK ALL

QE1. GENDER (Interviewer to code)
SINGLECODE

Male	1
Female	2

ASK ALL

QE2. What is your current age?
SINGLECODE

16-24	1
25-34	2
35-44	3
45-54	4
55-64	5
65-74	6
75+	7
<i>Refused</i>	8

WRITE IN EXACT AGE:	<input type="text"/>
---------------------	----------------------

ASK ALL

QE3. How many people, including yourself, are there in your household?
SINGLECODE

One	1
Two	2
Three	3
Four	4
Five	5
Six	6
Seven or more	7
<i>Refused</i>	8

ASK ALL WITH MORE THAN ONE PERSON IN HOUSEHOLD, OTHERS TO QE6

QE4. Who currently shares your household with you?

SHOWCARD NN. MULTICODE OK

Partner/Husband/Wife	1
Children (under 18)	2
Children (over 18)	3
Other family members	4
House/flat mates	5
Lodger	6
Other (please specify)	7
<i>Refused</i>	8

ASK ALL WITH CHILDREN UNDER 18, OTHERS TO QE6

QE5. How old is/are your child/ren?

MULTICODE

WRITE IN AND MULTICODE ONLY

	ENTER NUMBER OF CHILDREN OF EACH AGE
Aged or under 1	
Aged 1	
Aged 2	
Aged 3	
Aged 4	
Aged 5	
Aged 6	
Aged 7	
Aged 8	
Aged 9	
Aged 10	
Aged 11	
Aged 12	
Aged 13	
Aged 14	
Aged 15	
Aged 17	
<i>Refused</i>	

ASK ALL

QE6. And can I ask, are you... READ OUT. SINGLECODE

Married/co-habiting	1
Single	2
Divorced	3
Separated	4
Widowed	5
<i>Refused</i>	6

ASK ALL

QE7. What is your current working status? Are you...?

READ OUT. SINGLECODE

Working full time (over 30 hours per week)	1
Working part time (30 hours or under per week)	2
Student	3
Unemployed	4
Retired	5
Homemaker/housewife	6
Not working (Other reasons)	7
Refused	8

IF UNEMPLOYED/STUDENT/HOMEMAKER/NOT WORKING – OTHER (Code QE7=3,4,6,7)

QE7b. How long has it been since you last worked full or part-time?

SINGLECODE

Less than 1 month	1
2 to 3 months	2
More than 3 months	3
Refused	4

ASK ALL WORKING/RETIRED (QE7=1,2,5)/NOT WORKING LESS THAN 3 MONTHS (QE7b=1,2)

QE8a. Do (did) you work as an employee or are (were) you self-employed? IF SELF-EMPLOYED: Do you have employees? SINGLECODE

IF RETIRED USE PAST-TENSE

Employee	1
Self-employed with employees	2
Self-employed/freelance without employees	3
Refused	4
Not applicable	5

ASK ALL SELF-EMPLOYED WITH EMPLOYEES (QE8a=2)

QE8bi. How many people do you employ (did you employ)? SINGLECODE

IF RETIRED USE PAST-TENSE

1 to 24	1
25 or more	2
Don't know/Can't recall	3
Refused	4
Not applicable	5

ASK ALL EMPLOYEES (QE8a=1)

QE8bii. And, how many people work (worked) for your employer at the place where you work (worked).? SINGLECODE

IF RETIRED USE PAST-TENSE

1 to 24	1
25 or more	2
Don't know/Can't recall	3
Refused	4
Not applicable	5

ASK ALL WORKING/RETIRED (QE7=1,2,5)/NOT WORKING LESS THAN 3 MONTHS (QE7b=1,2)
QE8c. Do (did) you supervise any other employees? SINGLECODE

IF RETIRED USE PAST-TENSE

Yes	1
No	2
Refused	3
Not applicable	4

ASK ALL WORKING/RETIRED (QE7=1,2,5)/UNEMPLOYED LESS THAN 3 MONTHS (QE7b=1,2)
QE8d. Which of the following best describes the sort of work you do? (If you are not working now, please choose what you did in your last job).
 SHOWCARD OO. SINGLECODE

IF RETIRED USE PAST-TENSE

<u>Modern professional occupations</u> (eg. teacher, nurse, physiotherapist, social worker, welfare officer, artist, musician, police officer (sergeant or above), web designer etc.)	1
<u>Clerical and intermediate occupations</u> (eg. secretary, PA, clerical worker, office clerk, call centre agent, nursing auxiliary, nursery nurse etc)	2
<u>Senior managers or administrators</u> - manger/administrator responsible for planning, organising and co-ordinating work or finance. COO/CFO, CEO etc	3
<u>Technical and craft occupations</u> (eg. motor mechanic, fitter, inspector, plumber, printer, toolmaker, electrician, gardener, train driver etc)	4
<u>Semi-routine manual and service occupations</u> (eg. postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, receptionist, sales assistant)	5
<u>Routine manual and service occupations</u> (eg. HGV driver, van driver, cleaner, porter, packer, sewing machinist, messenger, labourer, bar staff etc)	6
<u>Middle or junior managers</u> (eg. office manager, retail manager, bank manager, restaurant manager, warehouse manager, publican)	7
<u>Traditional professional occupations</u> (eg accountant - solicitor - medical practitioner - scientist - civil / mechanical engineer)	8
Refused	9
Not applicable	10

ASK ALL

QE9. What is the highest level of education you have achieved?

SHOWCARD PP. SINGLECODE.

No formal education	1
Some primary school	2
Completed primary school	3
Some secondary school	4
Completed secondary school	5
College/vocational training (after completing secondary school)	6
University degree	7
Masters Degree	8
PHD	9
Still studying	10
<i>Refused</i>	11

ASK ALL

QE10. What is your current household income before tax?

SHOWCARD QQ. SINGLECODE

Under £5,000	1
£5,000 to £9,999	2
£10,000 to £14,999	3
£15,000 to £24,999	4
£25,000 to £34,999	5
£35,000 to £49,999	6
£50,000 to £59,999	7
£60,000 to £74,999	8
£75,000 to £99,999	9
£100,000 or more	10
Don't Know	11
<i>Refused</i>	12

CODE FOR ALL

QE11. CODE SOCIAL CLASS

SINGLECODE

A	1
B	2
C1	3
C2	4
D	5
E	6

ASK ALL

QE12. Is your home...?

SHOWCARD RR. SINGLECODE

Rented accommodation	1
Home owner accommodation	2
Local authority accommodation	3
Other (please specify)	4
Refused	5

RECORD FOR ALL

QE13. LOCAL AREA

SINGLECODE

ENGLAND					SCOTLAND		
1	Beds/Herts	16	Essex	32	Newcastle	48	Highlands & Islands
2	Berkshire	17	Gloucester	33	Norfolk	49	North East Scotland
3	Birmingham	18	Guernsey	34	Northampton	50	Tayside & Central Scotland
4	Black Country	19	Hampshire (Solent)	35	Nottingham	51	Glasgow & West of Scotland
5	Bradford	20	Hereford and Worcester	36	Oxford	52	Edinburgh & East of Scotland
6	Bristol	21	Humburside (Hull)	37	Sheffield	53	South Scotland
7	Buckinghamshire	22	Isle Of Man	38	Shropshire		WALES
8	Cambridgeshire	23	Jersey	39	Somerset	54	North-West Wales
9	Cheshire	24	Kent	40	Staffordshire (Stoke)	55	North-East Wales
10	Cornwall	25	Lancashire	41	Suffolk	56	Mid Wales
11	Coventry and Warwickshire	26	Leeds	42	Surrey	57	South-West Wales
12	Cumbria	27	Leicester	43	Sussex	58	South-East Wales.
13	Derby	28	Lincolnshire	44	Teeside		NORTHERN IRELAND
14	Devon	29	London	45	Wear	59	Foyle
15	Dorset	30	Manchester	46	Wiltshire	60	Ulster
		31	Merseyside	47	North Yorkshire		

RECORD FOR ALL

QE14. GOVERNMENT OFFICE AREA

SINGLECODE

North East	1
North West	2
Yorkshire and The Humber	3
East Midlands	4
West Midlands	5
East of England	6
London	7
South East	8
South West	9
Wales	10
Scotland	11
Northern Ireland	12

ASK ALL

QE15. Were you born and brought up in [READ OUT RELEVANT LOCAL AREA]?

SINGLECODE

Yes	1
No	2

ASK ALL NOT BORN IN LOCAL AREA (QE15=2), OTHERS TO QE17

QE16. How long have you lived in [READ OUT RELEVANT LOCAL AREA]?
SINGLECODE

Less than 1 year	1
2 to 3 years	2
4 to 5 years	3
6 to 10 years	4
11 to 20 years	5
More than 20 years	6
Don't know/Can't recall	7

ASK ALL

QE17. Which of the following best describes your ethnic origin? (IF NECESSARY: By this I mean your cultural background?)
SHOWCARD SS. SINGLECODE

White Welsh	1
White English	2
White Scottish	3
White Northern Irish	4
White Irish	2
White British	6
Any other white background	7
Mixed White and Black Caribbean	8
Mixed White and Black African	9
Mixed White and Asian	10
Any other mixed background	11
Indian	12
Pakistani	13
Bangladeshi	14
Chinese	15
Any other Asian background	16
Black Caribbean	17
Black African	18
Any other Black Background	19
	20
Other (PLEASE SPECIFY)	21
<i>Refused</i>	22

ASK ALL IN WALES, OTHERS TO QE19

QE18. Which of the following statements best describes your ability to speak and read Welsh?

READ OUT. SINGLECODE

NOTE WELSH RESPONDENTS WILL HAVE ANSWERED A SIMILAR QUESTION AT QS4. IF NEEDED EXPLAIN THAT QUESTION NEEDS TO BE ASKED IN A DIFFERENT FORMAT.

I understand spoken Welsh only.	1
I speak but cannot read or write Welsh	2
I speak and read but do not write Welsh.	3
I speak, read and write Welsh	4
Another combination of skills.	5
No knowledge of Welsh.	6

ASK ALL

QE19. Can I just check, is English your first language?

SINGLECODE

Yes	1
No	2

ASK ALL

QE20. And finally, which, if any, of the following providers do you receive at home on your main TV? By main TV I'm referring to the TV which you watch the most

SINGLECODE

Just the standard terrestrial TV channels (BBC1, BBC2, ITV, CH4, FIVE)	1
Freeview (access to free digital channels via a box or built into your TV)	2
Sky Digital (with a monthly subscription via satellite dish)	3
Virgin Media (cable TV previously known as NTL:Telewest)	4
Freesat (satellite TV without a subscription)	5
BT Vision (service via BT Broadband)	6
Tiscali TV (service via Tiscali Broadband, previously called Homechoice)	7
Top-up TV (Freeview TV with additional channels via monthly subscription)	8
Other (please specify)	9
Do not have TV at home	10
Don't know	11