



Ofcom BBC Distinctiveness Research

Executive Summary 2017

Research Document

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About this document

Under the new Royal Charter and Agreement, regulation of the BBC passes from the BBC Trust to Ofcom on 3 April 2017. One of Ofcom's central responsibilities is to hold the BBC to account for fulfilling its mission and promoting its public purposes.

As part of our new responsibilities, it is important that Ofcom takes account of changing public tastes, attitudes and habits. To help us do so, each year we carry out research with over 3,500 adults from across the UK to ask them about their views on public service broadcasting.

However, to help us understand how audiences currently feel about the BBC and its new purposes, we have commissioned additional qualitative market research. As part of this work, we have asked people about what they expect from the BBC, exploring distinctiveness and gathering views from across our Nations, regions and diverse communities.

This document gives a summary of the key findings from our research which we have reflected in our consultation. A full written report will be published during our consultation, to allow people to take account of the detailed findings.

Section 1

Ofcom BBC Distinctiveness Research Executive Summary

1.1 Introduction

As part of our new duties regulating the BBC, it is important that Ofcom takes account of changing public tastes, attitudes and habits. To do this, we will carry out regular qualitative and quantitative research with audiences to ensure we remain in touch with people's priorities, concerns and what they want from the BBC.

Each year we carry out research with over 3500 adults from across the UK to ask them about their views on public service broadcasting. We know from this research, together with research from our third PSB Review, that the BBC remains the cornerstone of public service broadcasting (PSB) and that it continues to deliver high quality services that are valued by people across the UK¹².

However, the context in which the BBC operates is changing rapidly. Viewers now have more choice than ever before and are consuming ever more content on-demand and online. Younger people, in particular, are embracing online and on-demand services and watching increasing volumes of content off-schedule across a range of devices. As a result of these changes we are beginning to see a shift in audience perceptions regarding the BBC, and indeed the other PSBs. It was therefore considered timely to re-engage with audiences and update our understanding of how they feel about the BBC and its new purposes before taking on our new duties.

We have commissioned qualitative market research to speak to people about what they expect from the BBC, exploring distinctiveness and gathering views from across our Nations, regions and diverse communities.

This document gives a summary of the key findings from our research which we have reflected in our consultation. A full written report will be published during our consultation, to allow people to take account of the detailed findings.

1.2 Overall perceptions of the BBC

Overall the BBC was thought to offer consistently high quality output across its many different services, providing content that participants personally valued. People associated the BBC positively with being safe and reliable. It was also valued as a British institution, integral to British society, largely because of its long history and nostalgia for the influential role it has played in the lives of individuals, and the nation as a whole.

Within this were a wide range of views, with perceptions of the BBC varying across different demographic groups. Views ranged from the very positive, where the BBC was seen as a trusted institution offering reliable, high quality services which were highly valued. Other

¹ <https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2015/psb-review-statement>

² <https://www.ofcom.org.uk/tv-radio-and-on-demand/information-for-industry/public-service-broadcasting/public-service-broadcasting-annual-report-2016>

views were more negative. Some felt that the BBC was too traditional, did not take enough risks, or offer enough content for them personally.

Older and middle class participants were generally more positive about BBC services, feeling they could depend on them to meet high standards in terms of quality and professionalism. However, some younger and working class participants were more likely to view the BBC less favourably, describing it as old-fashioned or as offering very little of relevance for them. Related to this, there were mixed views on whether BBC content served all groups in society. Some felt that the BBC focused more on middle aged and middle class audiences, with fewer services for younger audiences, working class people, and people from minority groups.

The BBC's perceived strengths included:

- High quality TV dramas
- Documentaries on TV and radio
- Children's TV
- Radio, in terms of both the range and quality of services

The BBC's perceived weaknesses included:

- Comedy and light entertainment, particularly on TV
- Sports coverage, in terms of the range, rather than the quality of individual programmes
- A lack of risk-taking leading to too much reliance on familiar formats and programmes

Perceptions regarding BBC News were somewhat polarised, especially on television. Some considered it to be a reliable and unbiased source of news that they trusted, while others were concerned about impartiality and the BBC being the voice of the Establishment.

Participants had different views of BBC TV, radio and online services.

Perceptions of **BBC radio services** were extremely positive among those who listened to, or were familiar with, them. Listeners valued the variety of services for different audiences, and the quality of the programmes on different stations. Participants felt that BBC radio stations had some of the best shows and presenters available on radio. They also said it was easier to find the type of content they wanted because individual stations and programmes had very clear target audiences with quite specific offerings.

There were varying views towards **BBC television services**. Some people were extremely positive and felt that the BBC continued to provide familiar, high quality content. They felt this consistent approach made BBC TV different from other broadcasters. For others, BBC TV was too risk averse. Some younger participants were more critical and argued that BBC Three no longer being broadcast on TV suggested that producing more creative and innovative content for young people was not a priority for the BBC. Some were even unaware that BBC Three could still be accessed online.

BBC Online services were also valued by those who used them. For example, the BBC News, BBC Weather and BBC Sport websites were considered clear and easy to navigate,

with the equivalent apps also well used and highly regarded. The BBC iPlayer was also described as easy to navigate, and as offering a good way to access high quality content from across the BBC. Those who used other on-demand services (such as Netflix and Amazon Prime) felt that the iPlayer needed to continue to improve to match these.

1.3 Opinions on the BBC's role in society and the new public purposes

As part of the research participants were shown the BBC's new Public Purposes and asked to consider which they considered important, both to themselves and to society as a whole. Overall, people felt the Purposes were a good summary of what the BBC should aspire to be and do, often reflecting their own views of the role of the BBC. Generally, all the Purposes were considered to be important and to have value. Again, there were a wide range of views reflecting people's different priorities. Broadly ranked in order of importance to society:

- **To provide impartial news and information** – this was considered perhaps the most important for society across the discussions, but was also a personal priority for many participants.
- **To reflect, represent and serve the diverse communities of the UK** – this was seen as important for society, with many participants also citing it as a personal priority. However, some recognised the challenges in fulfilling this purpose – particularly the tensions between offering mainstream vs. niche programming and the scheduling of such programmes on high reach vs. low reach channels.
- **To support learning for people of all ages** – this was described as important for society, but was not always a personal priority for participants.
- **To show the most creative, highest quality and distinctive output and services** – this was viewed as generally important personally, but deemed relatively less so for society.
- **To reflect the UK, its culture and values to the world** – there was some uncertainty about what this would mean in practice, and mixed views about how important it is for the BBC to focus on this given its other priorities.

1.4 Distinctiveness and the BBC

The BBC was felt to be distinctive in terms of both its character and content. In terms of character, it was seen as a distinctive British institution with all the history that goes alongside its unique funding and its remit. But the BBC was also seen as distinctive for the quality of its output, its reliability, and its professional tone. Some people highlighted this by saying that they would know a programme was produced by the BBC without having to be told. However, the BBC was not generally considered distinctive in terms of being fresh, new and innovative and a creative risk taker.

Perceptions of distinctiveness also varied by platform.

BBC television content was seen as distinctive because of its high-quality production and the talent and professionalism of its presenters. Additionally, it was considered distinctive because of its unique coverage of important national events such as the Olympics or royal weddings. This was considered a core role for the BBC and most participants went to it for this type of content. They felt the coverage would be of higher quality and in greater depth than they would be able to get elsewhere.

BBC television was seen to be a leader in some areas. Programmes such as *Planet Earth II* and *The Great British Bake Off* were viewed as exceptional and unique compared to anything seen on other channels. However, it was also noted that BBC continues to produce popular programmes for a long time, limiting their ability to innovate. Audiences wanted the BBC to take more risks with their TV content, but to continue to produce these popular shows that they liked. They recognised that this was a significant challenge for the BBC.

The talent and professionalism of BBC presenters – for example, on news, current affairs, and documentaries – was thought to be unique to the BBC. However, this was not always seen as positive by younger audiences who felt that there could be more presenters who appealed to them.

In order to become more distinctive, audiences wanted to see a greater diversity in terms of writers, producers and talent on BBC TV. It was felt that the BBC could do more to represent all of society; by being more ethnically diverse, more geographically diverse, and more representative of younger generations.

BBC Radio services were viewed as being highly distinctive in terms of both their range and the quality of their programmes. They were seen as serving a broad range of audiences of different ages and with different interests and tastes. Participants did not think other providers covered the same range of music, sport, talk shows and drama content. In particular, stations such as Radio 1, Radio 1Xtra, Radio 4 and Radio 6 Music were all seen as providing something different to commercial stations. Radio 1 and 1Xtra were distinctive for airing new British talent, and for being more relevant and engaging for younger listeners than commercial stations. Radio 4 was different in terms of the range of its programmes and their quality.

Most were very positive towards BBC Radio, suggesting no significant changes to improve distinctiveness. However, a few participants suggested that BBC Radio could be more distinctive by showcasing even more non-mainstream music, or by more coverage to local issues and music.

BBC Online content was thought to be consistent and clear. The BBC News website was felt to have a distinctive brand and layout, with its clear format and the reliability of its content making it different to other providers. However, BBC iPlayer was not seen to be as distinctive when compared to alternatives such as Netflix and Amazon Prime. It was considered easy to use by older groups, but as less intuitive and increasingly behind the curve by younger generations. Users felt that the BBC iPlayer needed to adapt by offering recommendations and by increasing access to back catalogues of TV content.

As part of the research process, participants were introduced to Schedule 2 as detailed in the BBC Framework Agreement. Schedule 2 provides Ofcom with detailed guidance on how we should interpret the requirements on the BBC to provide distinctive output and services both in peak time and overall, and on television, radio and online, in terms of:

- The mix of genres and output
- The quality of output
- The amount of original output produced in the UK
- The level of risk-taking, innovation, challenge and creative ambition
- The range of audiences it serves

While participants found it difficult to know exactly what Schedule 2 might mean in practice without greater detail, they felt that it did cover important aspects of distinctiveness. This list reflected participants' priorities for distinctive content; in particular, the quality of output, the amount of original output produced in the UK and the range of audiences it serves were important to participants.

Quality of output was seen as important for distinctiveness across people of all ages and backgrounds. It was seen to be a priority for viewers personally and something that the BBC already did, and should continue to do, to be distinctive.

It was important for the BBC to have original, UK produced output on TV and radio in order to support UK writers, actors, musicians and presenters. This was viewed as an important part of the BBC's role in society, and something it does to some extent already. For example, the BBC was perceived to do this particularly well for music on stations such as Radio 1, Radio 1Xtra and Radio 6 Music.

Participants felt that given the BBC's public funding, it was essential that produced content to serve a range of audiences. The BBC was thought to do this to some extent already, but participants were also clear that it could do more to reflect and serve different audiences across the UK, for example in terms of age, Nation, ethnic background, and social class.

The level of risk-taking, innovation, challenge and creative ambition was the most contested aspect of distinctiveness. Some felt that the BBC should focus on what it does best, arguing that the BBC does not need to compete with every other provider. In particular, they felt that the BBC cannot rival high-budget American shows, and should instead prioritise content that other channels do not make. However, there was also the view, among younger audiences especially, that the BBC needs to adapt and to produce more innovative and creative content to continue to attract audiences and remain relevant.

Both younger and older participants wanted BBC content to be distinctive. Older participants viewed distinctiveness in terms of the BBC's unique position in providing the type of content it already (and traditionally) provides, while younger groups saw distinctiveness as meaning new and innovative content. Overall, a balance between some more innovative content, alongside a continuation of popular content, was the preference.

The qualitative research was carried out by Ipsos MORI with fieldwork taking place throughout January and February 2017. Despite being qualitative in nature, the project was robust in scale and scope, comprising of six 3 hour workshops across the nations and regions (Harrow, Peterborough, Leeds, Inverness, Belfast and Swansea). There were additional smaller workshops with Lesbian, Gay and Bi-sexual people (LGB) and Black and Asian people, as well as some depth interviews with Transgender people. In total, Ipsos MORI spoke to around 170 people of varying ages and social grades, across the UK on behalf of Ofcom. The research explored people's views of the BBC, opinions on its role in society and the new public purposes, alongside views towards distinctiveness and the BBC.

Quantitative market research is currently in progress. It will focus on audience opinions about distinctiveness among 2100 nationally representative sample, including boosts to allow for analysis across Nations, regions and BAME communities. Reporting on this stage is planned for Q2 2017/18.