



UK audience attitudes towards broadcast media

A summary of findings

Research Document

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Section 1

About this document

This report explores UK adults' attitudes and opinions towards television and radio broadcasting, and related areas such as programme standards, advertising and regulation. It summarises the findings set out in the accompanying chart pack analysis of the research results (Annex 1).

The research findings from Ofcom's Media Tracker study provide a valuable source of information on consumers' attitudes, and help inform Ofcom's work on broadcasting standards.

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

Ofcom recognises that people's views on generally accepted standards may change over time and so should be explored by ongoing consumer research. This report is one of a range of sources that Ofcom draws on in undertaking its broadcasting standards duties.

Section 2

Key points

This year's *UK Audience Attitudes Towards Broadcast Media* report shows that adults' opinions and attitudes have broadly remained consistent since last year.

Opinions around the quality of television programmes

Opinions among UK adults on the quality of television programming have remained unchanged since 2014, with half of viewers (50%) feeling that the quality of programming has stayed about the same. However, almost a third of adults (30%) felt that programming quality had worsened in 2015; the main reasons for the drop in quality were: more repeats, a lack of variety and an overall lack of quality. A minority of adults (17%) felt that programme quality had improved in 2015.

Opinions on offensive content

Levels of personal offence resulting from seeing something on television, remained relatively low, at a fifth of adults. This is in line with 2014 figures. The top three types of content that were most likely to cause offence to viewers were: sexual content (38%), violence (37%) and bad language (37%). Among those offended, the most common reaction towards the offensive material was to switch over to a different channel (50%). Opinions around the amount of offensive content acceptable to viewers have changed over recent years, with more adults considering there to be acceptable levels of sexual content, violence and bad language on TV.

Opinions around media intrusion

Along with opinions towards the amount of certain types of content on television, the Media Tracker also asks adults which media they consider to be the most intrusive. Newspapers were considered by the majority of adults to be the medium most intrusive into the lives of people in the public eye (39%) and into the lives of members of the general public (35%). This is consistent with the view held by adults in 2014, despite significantly fewer adults thinking this in 2015. As in 2014, adults considered television to be the second most intrusive form of media; the numbers citing television were significantly higher than in 2014.

Awareness of media regulation

Awareness of media regulation remains high among all adults. For example, nine in ten adults are aware of the watershed, and the majority (60%) still consider 9pm to be an acceptable time for programmes unsuitable for children to start to be broadcast. However, as with tolerance of particular types of content, awareness of the watershed differs by age: awareness is higher among older than among younger adults. Although lower than in 2014, awareness that television programmes are regulated was still high in 2015, at eight in ten adults.

Section 3

Methodology

The fieldwork for the Media Tracker study was conducted for Ofcom by the research agency Saville Rossiter-Base, using face-to-face interviews conducted in respondents' homes. The interviewing was conducted across four equal waves (February, May, August and November 2015) to counter potential seasonality issues. Over the four waves of fieldwork, a sample of 2,107 adults aged 16+ were interviewed and then weighted to be representative of the UK adult population. The data presented here are based on the weighted sample.

Changes in approach and time-series data

Several changes in approach were made to the Media Tracker study in 2014, including a change of research agency, a questionnaire review and a method change, moving from paper and pencil (PAPI) to computer-assisted personal interviewing (CAPI). There were other structural survey changes in 2005 and 2008¹.

Any comparisons over time should therefore be made with caution and treated as indicative only, as variances in the results may be due in part to changes in the methodology, and not necessarily indicate a shift in consumer attitudes.

Where shown, vertical dashed lines are used within the Figures in the report to show where there were changes in interview method in 2008 or in 2014.

Testing for significant differences

Data from 2014 and 2015 are tested against each other for any statistically significant differences. Significant differences are shown within the Figures in this report, using arrows, and the text underneath the Figures explains the testing that has been conducted in each case. These differences are highlighted at the 95% level, meaning that where findings are commented on, there is only a 5% or smaller probability that the difference between the samples is by chance. All sub-group data are from 2015 only, and measures for individual age groups (16-34/ 35-54/ 55-64/ 65+) are tested for against the all-adult measure. Testing is also conducted between socio-economic groups (ABC1/C2DE), by gender and between parents/ non-parents.

Any differences reported here comparing 2014 and 2015 data, or comparing 2015 sub-group data, are statistically significant differences.

¹ Some of the questions in the Media Tracker study have been tracked for some years, and before 2005 were published in the ITC's *The Public's View* survey. Please see http://www.ofcom.org.uk/static/archive/itc/uploads/The_Publics_View_2002.pdf for further details on the content, results and methodology.

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

Section 4

Attitudes towards programme standards

This section provides a summary of the findings relating to traditional broadcast content on television. Adults with a TV set were asked about their opinion on a range of topics, including the quality of TV programmes, whether they had found anything on TV to be offensive, their opinion on the amount of sex, violence and swearing on TV, and any exposure to harmful content. This section also addresses opinions on media intrusion.

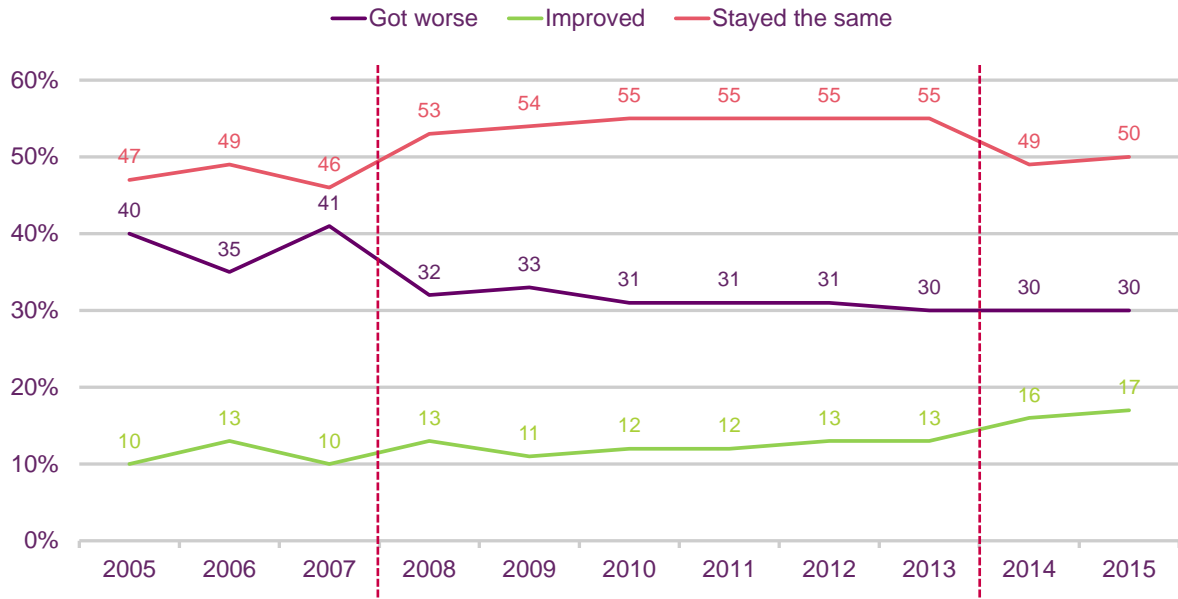
4.1 Quality of TV programmes

Most adult viewers think that the quality of TV programmes has neither improved nor worsened over the past year

- When asked whether TV programmes had improved, stayed the same or got worse over the past 12 months, half (50%) of adult viewers said they had 'stayed the same' (Figure 1). Nearly twice as many adults felt that programmes had 'got worse' (30%) as those who felt that programmes had 'improved' (17%). Each measure is unchanged since 2014, and has largely been unchanged since 2008.
- Adults aged 16-34 are more likely than all adults to say that TV programmes have 'improved' (24% vs. 17%) as are those in ABC1 socio-economic groups compared to those in C2DE groups (21% vs. 13%)².
- Adults aged 65 and over are more likely than all adults to feel that TV programmes have 'got worse' (44% vs. 30%) as are those in C2DE socio-economic groups (34% vs. 26% for those in ABC1 groups²).

² See Annex 1 slide 3

Figure 1: Opinion on the quality of programmes over the past 12 months (% adults with a TV)

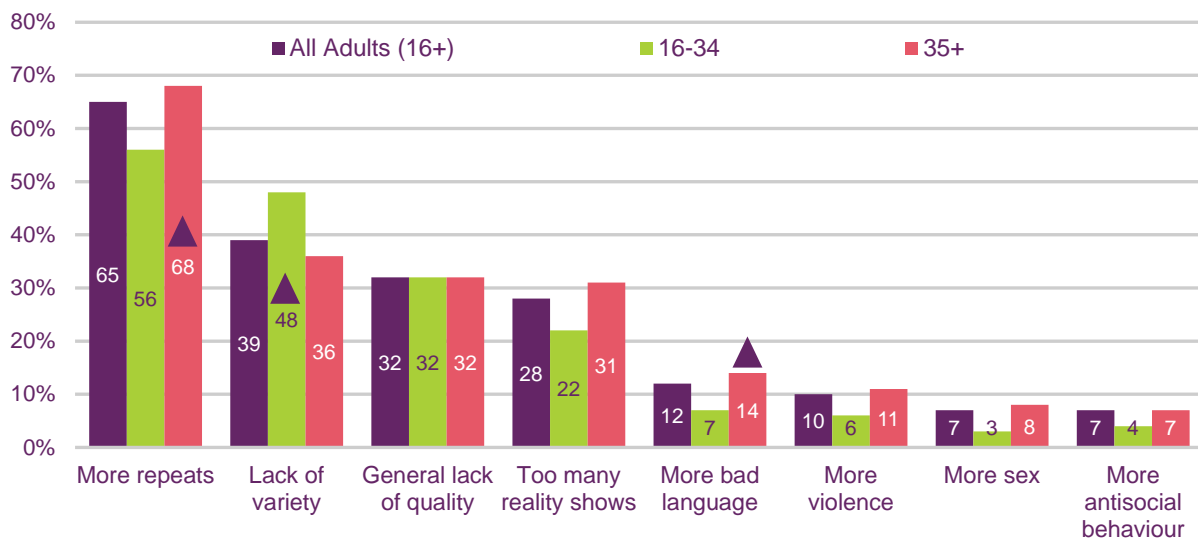


Source: Ofcom Media Tracker 2015. 'Don't know' responses not charted. Q20 - Do you feel that over the past year television programmes have improved, got worse or stayed about the same? Base: All with any TV sets (2052); Prompted, single code. Base prior to 2014: all with TV, but excluding those never watching. Significance testing shows any difference between 2014 and 2015. Dashed line to show where survey method changed.

Among those who think that TV programmes have got worse in the past year, the main reason is ‘more repeats’

- Among those who said programmes had got worse, the top four reasons given were ‘more repeats’ (65%), ‘lack of variety’ (39%), ‘general lack of quality’ (32%) and ‘too many reality shows’ (28%).
- There was some variation in responses between younger (16-34) and older (35+) adults who felt that programmes had got worse. Compared to those aged under 35, older adults (aged 35 and over) were more likely to say this was due to more repeats (68% vs. 56%). Younger adults were more likely than the over-35s to say it was due to a lack of variety (48% vs. 36%). More than one in ten of all adults who thought programmes had got worse said this was due to an increase in bad language (12%). Adults aged 35 and over (14%) were twice as likely as those aged under 35 to say this (7%). (Figure 2).
- The arrows indicate where, in 2015, adults aged 16-34 are more likely or less likely than adults aged 35 and over to mention a particular reason for programmes getting worse in the past year.

Figure 2: Top reasons given for programmes getting worse in past 12 months

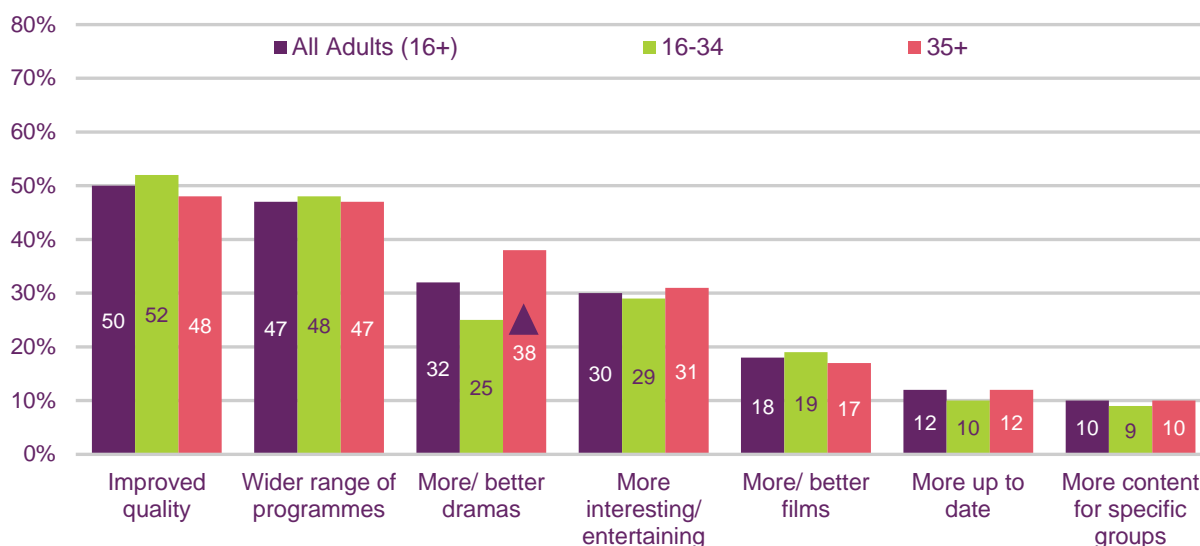


Source: Ofcom Media Tracker 2015. Q22 - In what ways do you think that the television programmes have got worse over the past year? Base: All saying programmes ‘got worse’ over past year (646); 16-34 (139); 35+ (507). Unprompted, multicode. Only top individual responses are charted. Significance testing shows any difference between age groups.

Adults who think that TV programmes have improved over the past year say that this is mostly due to better quality and a wider range of programming

- Among those who thought programmes had improved, the top four reasons given were: 'improved quality' (50%), 'wider range or programmes' (47%), 'more/ better dramas' (32%) and more interesting/ entertaining' (30%).
- The reasons given for improvement were broadly consistent across the age groups shown. However, over-35s were more likely than under-35s to say this was due to 'more/ better dramas' (38% vs. 25%). (Figure 3).
- The arrows indicate where, in 2015, adults aged 16-34 are more likely or less likely than adults aged 35 and over to mention a particular reason for programmes having improved in the past year.

Figure 3: Top reasons given for programmes having improved in past 12 months



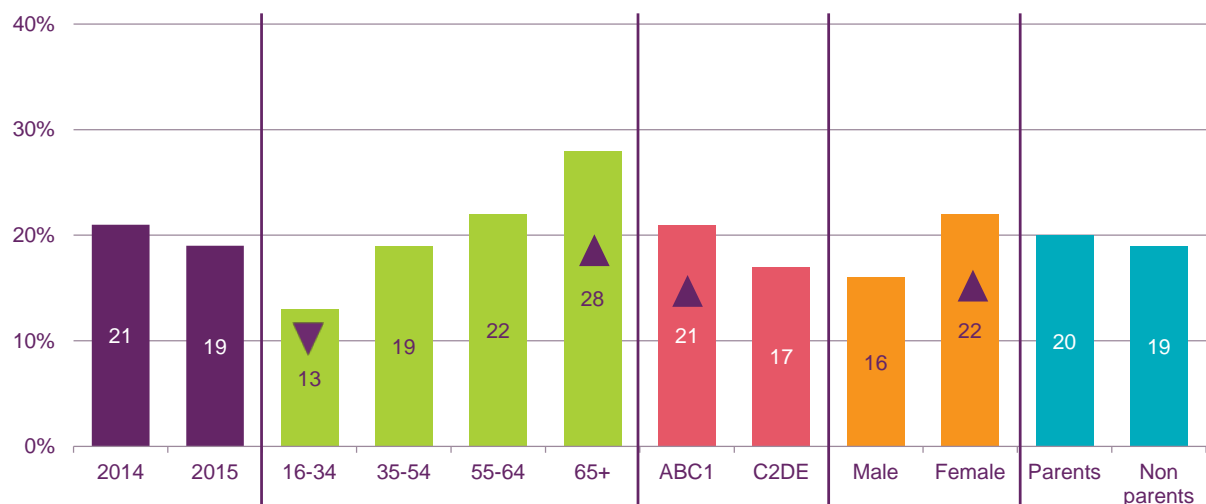
Source: Ofcom Media Tracker 2015. Q21 - In what ways do you think that the television programmes have improved over the past year? Base: All saying programmes "improved" over past year (320); 16-34 (130); 35+ (190). Unprompted, multicode. Only top individual responses are charted. Significance testing shows any difference between age groups.

4.2 Levels of offence on TV

A fifth of UK adults have been offended by something on television in the past year. Older viewers are more likely to be offended

- One-fifth (19%) of adult viewers in the UK said they had personally found something on television offensive in the past 12 months. This figure is unchanged since 2014 and has largely been unchanged since 2010 (a different question was asked prior to 2010).
- Those aged 16-34 (13%) were the least likely to have been offended, compared to all viewers, while over-65s (28%) were more likely than all viewers to be offended. More adults in the ABC1 socio-economic groups were offended (21%) than in the C2DE groups (17%), as were women (22% vs. 16% for men).
- While not shown in Figure 4, as a means of comparison, only 2% of radio listeners said they had heard something offensive on radio in the last 12 months; this is also unchanged since 2014³.
- The arrows indicate where, in 2015, adults in different age groups are more likely or less likely compared to all adults to say they have been offended by something on television in the past 12 months, where there are differences in this measure for adults in ABC1 and C2DE socio-economic groups and by gender.

Figure 4: Overall percentage who have been offended by something on TV (% of adults with a TV)



Source: Ofcom Media Tracker 2015. Q41 - In the past 12 months, have you personally found anything on television to be offensive? Base: all with any TV sets (2052); 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); ABC1 (1055); C2DE (993); male (966); female (1086); parents (594); non-parents (1458). Prompted, single code. Significance testing shows any difference between 2014 and 2015, any difference between any age group and all adults and any difference between socio-economic groups, by gender and between parents and non-parents.

³ See Annex 1 slide 11

The main types of offensive content on television are bad language, violence and sexual content.

- As shown in Figure 5, among those who had been offended by something on television, three main types of content stand out: sex/ sexual content (38%), violence (37%) and bad language (37%). Younger adults were more likely than older adults to say they had been offended by some type of discrimination (25% vs. 15%) or by anti-social behaviour (24% vs. 13%). The main types of offensive content are unchanged since 2014.
- The arrows indicate where, in 2015, adults aged 16-44 are more likely or less likely than adults aged 45 and over to mention a particular type of material.

Figure 5: Type of material which offended

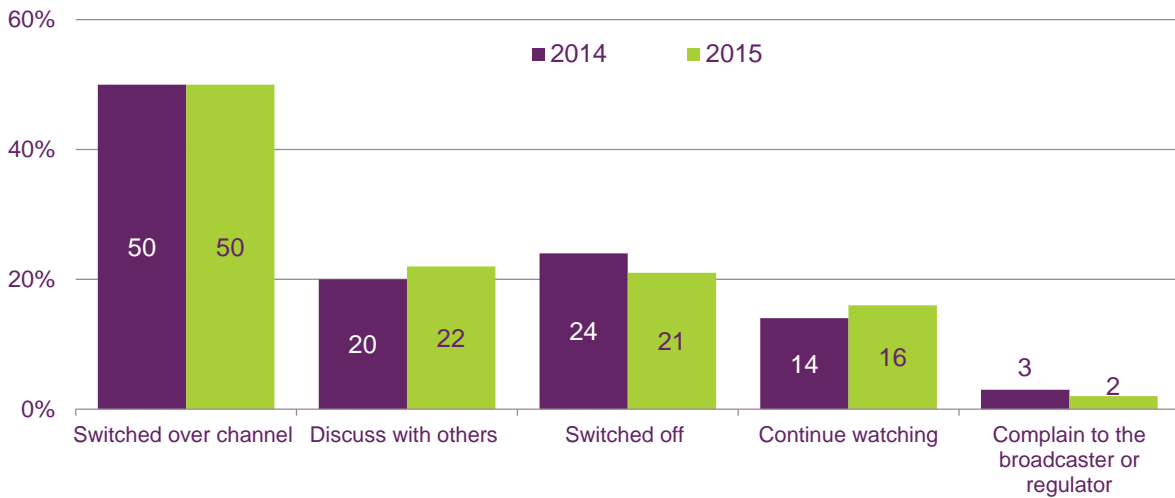


Source: Ofcom Media Tracker 2015. Q42 - What kind of thing offended you? Base: All who said they'd seen something offensive in last 12 months 2015 (398), 16-44 (139), 45+ (259). Unprompted, multicode. Top reasons charted. Significance testing shows any difference between age groups. Base too low for 16-34 (77 interviews) vs. 35+ analysis.

Switching channel is the most common reaction among those personally offended by something on television

- Of those who had seen something personally offensive on television in the last 12 months, half (50%) said they reacted by switching channels. In contrast, around one in five (21%) reacted by switching off the TV completely, or by discussing it with others (22%), while 16% continued watching.

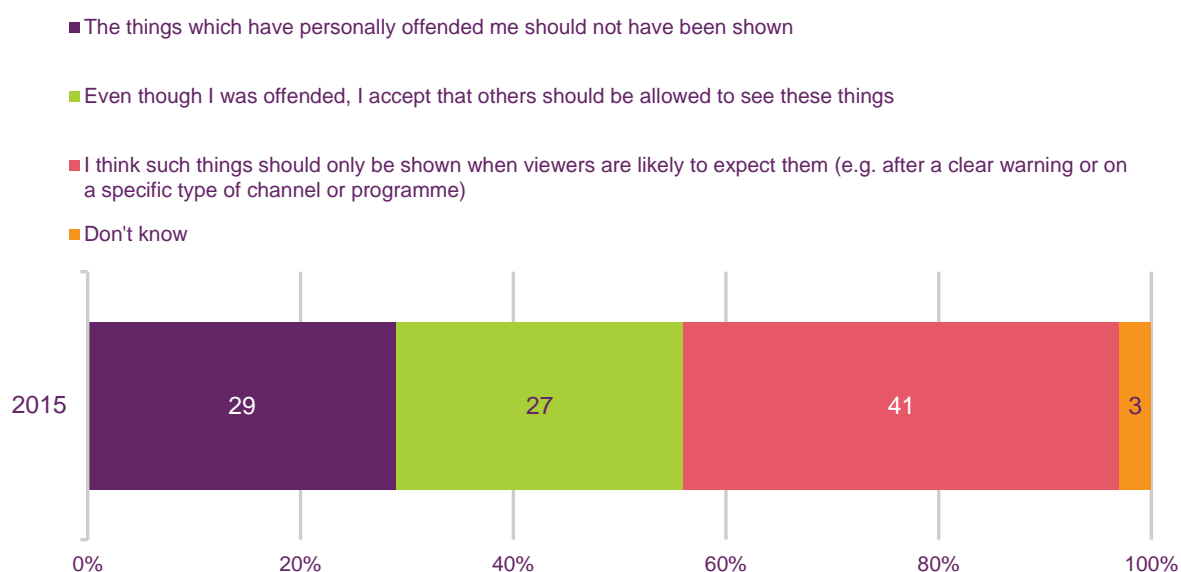
Figure 6: Reaction following offence by something on television



Source: Ofcom Media Tracker 2015. Q44 – How did you react when you were offended by what you saw on television? In other words, which, if any, of these things did you do? Base: All who said they’d seen something offensive in last 12 months in 2014 (421), 2015 (398), Prompted, multicode. Significance testing shows any difference between 2014 and 2015.

- As shown in Figure 7, among those who had been personally offended, four in ten (41%) agreed with the statement “I think such things should only be shown when viewers are likely to expect them (e.g. after a clear warning or on a specific type of channel or programme)”. Around three in ten (29%) agreed instead with the statement: “The things which have personally offended me should not be shown”, while a similar number (27%) accepted that: “others should be allowed to see these things”.

Figure 7: Attitudes towards offensive material



Source: Ofcom Media Tracker 2015. Q45 – Which of these statements best describes your attitude towards the things which have offended you on TV in the last 12 months? Base: All who said they'd seen something offensive in last 12 months (398), Prompted, single code.

4.3 Attitudes towards sex, violence, swearing and harmful content on TV

Four in ten adults think there is too much violence and swearing on television; a quarter say there is too much sex

- Figure 8 shows that around four in ten adult viewers felt there was 'too much' violence (41%) and swearing (38%) on television, while 25% felt there was 'too much' sex. Most adults felt there was 'an acceptable amount' of sex, violence or swearing on television. A minority felt that there was 'too little' of each type of content.
- Fewer adults than in 2014 said that there was 'too much' sex on television (25% vs. 28% in 2014, not shown in Figure 8). There was no change in the figures for the amount of violence or swearing on television.⁴ While a change has been made to the answer options available at these questions, the longer term trend dating back to 2001 shows a decline in the opinion that there is 'too much' sex, violence and swearing on television. For example, in 2001, 44% of adults felt there was too much sex on television (25% in 2015), 62% felt there was too much violence (41% in 2015) and 54% felt there was too much swearing on television (38% in 2015).
- Attitudes towards the amount of sex, violence and swearing on television in 2015 differ by age. Older adults (over-55s) were more likely to feel there was 'too much' of this content, and younger adults (aged 16-35) were more likely to feel there was 'an acceptable amount' and less likely to feel there was 'too much'.⁵
- While 25% of adult viewers felt there was 'too much' sex on television, this was more likely among those aged 55-64 (30%) and over-65s (40%). Those aged 16-34 (18%) and 35-54 (20%) were less likely to think this. Compared to adult viewers in ABC1

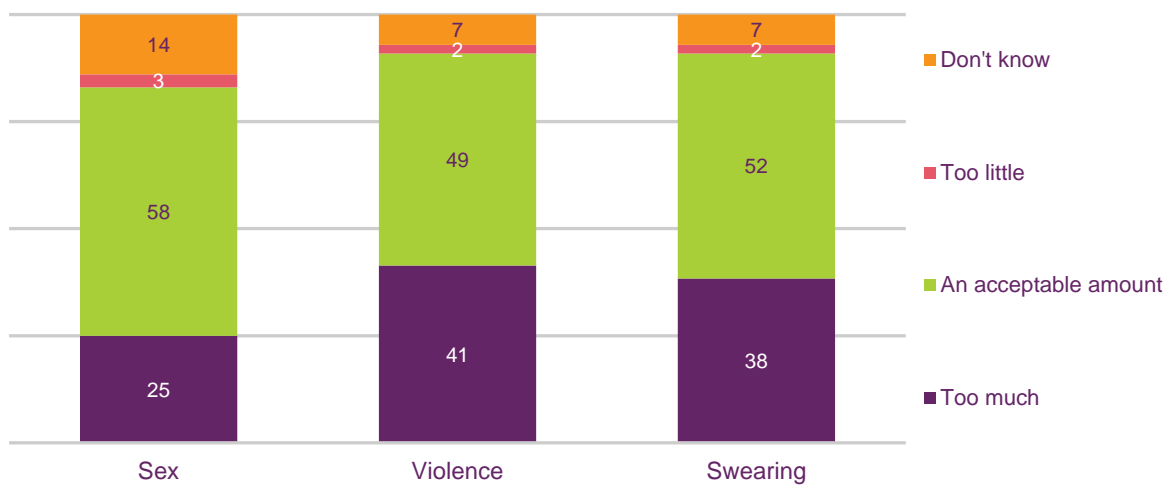
⁴ See Annex 1 slides 13,15,17

⁵ See Annex 1 slides 14,16,18

households, those in C2DE households were also more likely to say there was ‘too much’ sex on television (27% vs. 22%). Attitudes did not differ between parents and non-parents⁶.

- Overall, 41% of adult viewers felt there was ‘too much’ violence on television. This was more likely among those aged 55-64 (51%) and over 65 (65%) and less likely among those aged 16-34 (24%). Attitudes did not differ by household socio-economic group or between parents and non-parents⁷.
- As with attitudes to violence, overall, 38% of adult viewers felt there was ‘too much’ swearing on television. This was more likely among those aged 55-64 (50%) and 65 and over (59%) and less likely among those aged 16-34 (22%). Attitudes did not vary by socio-economic group or by family status⁸.

Figure 8: Opinion on the amount of sex, violence and swearing on TV (% of adults with a TV)



Source: Ofcom Media Tracker 2015. Q46 - Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television: a) Sex? b) Violence? c) Swearing? Base: All with any TV sets (2052). Prompted, single code.

A minority of adults believe that sexually explicit programmes should never be shown on TV

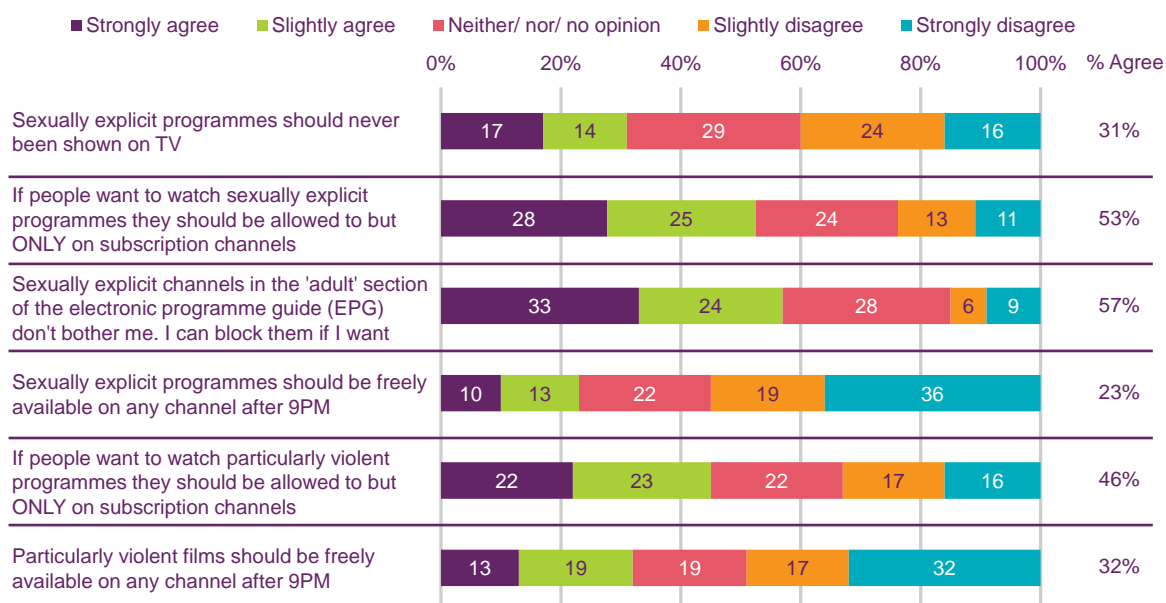
- Adult viewers were asked to consider six statements relating to potentially offensive material on television, and to say, for each, how much they agreed or disagreed with the statement. Figure 9 shows the responses to each statement in 2015. A minority of adults; 31%, agreed that sexually explicit programmes should never be shown. At the same time a minority; 23%, agreed that sexually explicit programmes should be freely available on any channel after 9pm. In contrast, more adults (32%) agreed that particularly violent films should be freely available on any channel after 9pm, though this was still a minority opinion.

⁶ See Annex 1 slide 14

⁷ See Annex 1 slides 16

⁸ See Annex 1 slides 18

Figure 9: Agreement with statements relating to potentially offensive material on TV (% of adults with a TV)

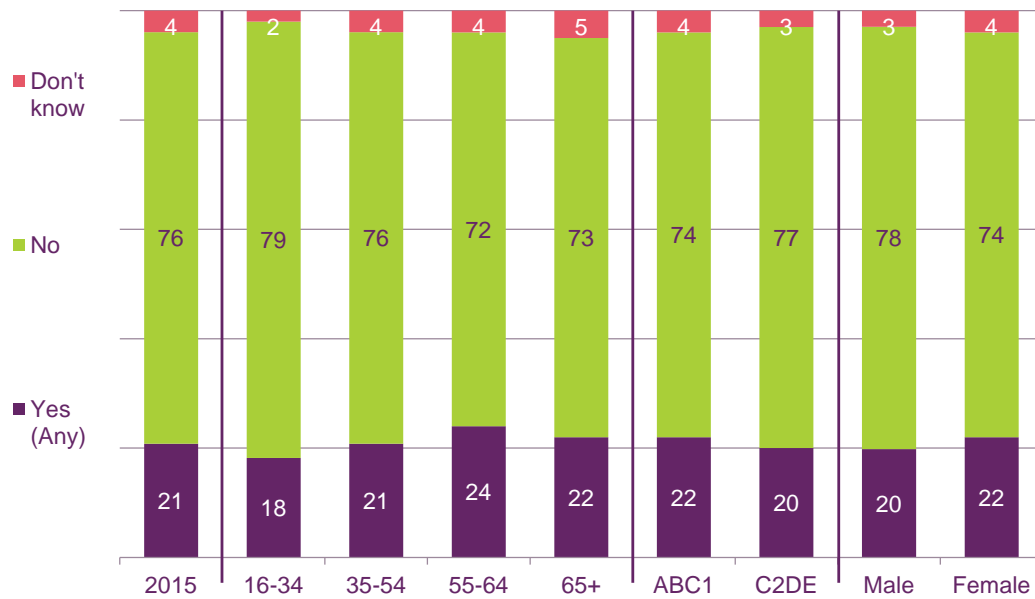


Source: Ofcom Media Tracker 2015. Q47 - I am going to read out some statements and I would like you to tell me how much you agree or disagree with them. Base: all with any TV sets (2052). Prompted, multicode.

One in five adults have seen something on TV that they consider harmful or damaging to themselves, other people or children

- One in five adults (21%) said they had seen something on TV in the past 12 months that they thought was harmful or damaging, either to themselves, or to other adults or children. This is unchanged since 2014. No variation by age, gender or socio-economic group was observed in 2015 (Figure 10).
- The overall incidence of 21% of adult viewers seeing something harmful is a combination of those who said they saw something harmful to children (16%), to themselves (8%) or to other adults (7%). Each of these incidences are also unchanged since 2014.

Figure 10: Overall % of respondents who have seen something on TV they consider harmful (% of adults with a TV)



Source: Ofcom Media Tracker 2015. Q48 - Have you seen anything on TV in the past 12 months that you thought was harmful or damaging either to yourself, other adults or children? Base: All with any TV sets (2052); 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); ABC1 (1055); C2DE (993); Male (997); Female (1110). Prompted, multicode. Significance testing shows any difference in the proportion saying 'yes' between any age group and all adults, and any difference between socio-economic groups and by gender.

The content that adults are most likely to consider harmful or damaging is violence

- Figure 11 shows the unprompted responses given as to what type of content adults considered to be harmful. Responses given by more than one in ten were: violence (55%), sex/ sexual content (37%), offensive language (27%), anti-social behaviour (20%) and bullying (15%).
- Parents were more likely than non-parents to say they had seen sexual content (46% vs. 33%) or bullying (20% vs. 12%) which they considered harmful.
- The arrows indicate where, in 2015, parents are more likely or less likely than non-parents to mention a particular type of television content considered to be harmful or damaging.

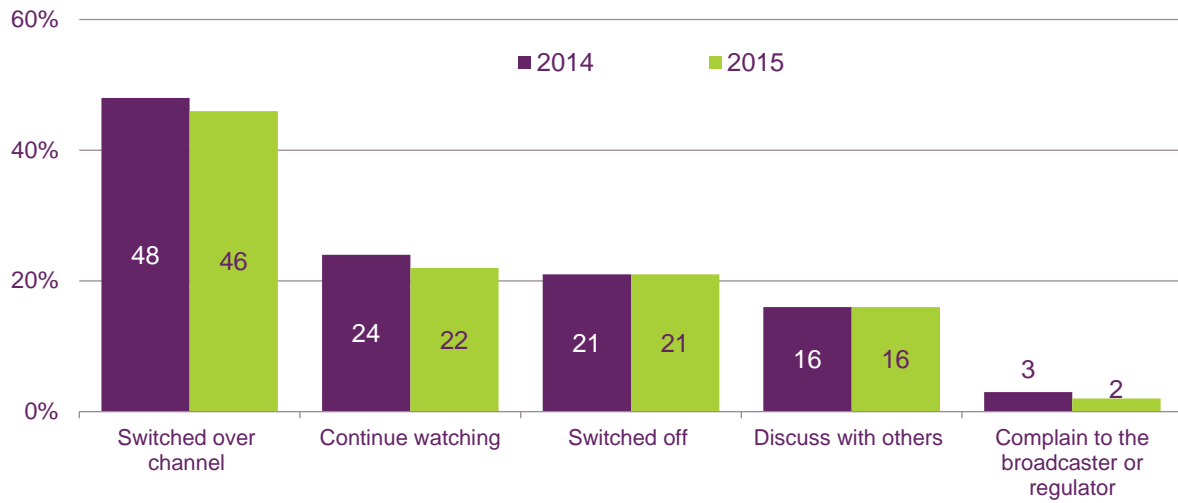
Figure 11: Television content considered to be harmful or damaging

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

Source: Ofcom Media Tracker 2015. Q49 – Can you please tell me what you saw that you thought was harmful or damaging? Base: all who have seen something harmful or damaging (429); parents (135); non-parents (294). Unprompted, multicode. Significance testing shows any difference between parents and non-parents.

- Reactions to seeing something harmful or damaging were unchanged since 2014 (Figure 12). Among those who said they had seen something harmful, almost half (46%) said they reacted by switching channels, around a fifth (22%) continued watching or switched off the TV completely (21%), while 16% discussed it with others. Few adults (2%) complained to the broadcaster or to the regulator.

Figure 12: Reaction to harmful or damaging content on television



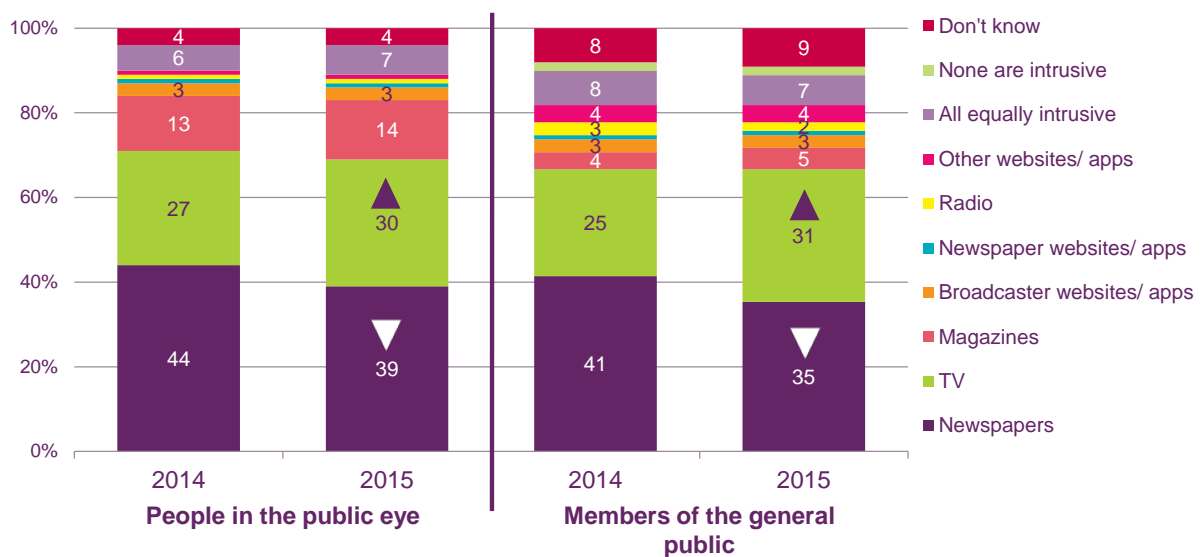
Source: Ofcom Media Tracker 2015. Q51 – How did you react when you saw something you thought was harmful or damaging? In other words what did you do? Base: all who said they'd seen something harmful or damaging on TV in last 12 months in 2014 (399); 2015 (429). Prompted, multicode. Significance testing shows any difference between 2014 and 2015.

4.4 Opinion on most intrusive media

Adults are now more likely than in 2014 to say that television is the most intrusive media source, but newspapers remain the most-named source

- Adults were prompted with a list of possible sources and were asked to say which one they considered to be the most intrusive into the lives of people in the public eye (celebrities, politicians and other public figures) and – separately – into the lives of the general public. The results from 2014 and 2015 are shown in Figure 13.
- The arrows indicate where any media are more likely or less likely to be mentioned in 2015 compared to 2014.
- Newspapers and TV were the two sources that adults considered to be the most intrusive into the lives of both people in the public eye and members of the general public. While in 2015 newspapers were considered the most intrusive for people in the public eye (39%) and members of the general public (35%), both these measures have decreased since 2014 (from 44% and from 41% respectively). In contrast, adults in 2015 were more likely than in 2014 to say that television was most intrusive for people in the public eye (30% vs. 27%) and for the general public (31% vs. 25%).
- Just over one in ten adults considered magazines (14%) to be most intrusive into the lives of people in the public eye.

Figure 13: Opinion on intrusiveness of media into people’s lives (% of all adults)



Source: Ofcom Media Tracker 2015. Q70 - Thinking specifically about people in the public eye - that is celebrities, politicians and other public figures rather than the general public - which one, if any, of these sources do you feel is the most intrusive into the lives of these people?

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

Base: All respondents in 2014 (2074); 2015 (2107). Prompted, single code. Significance testing shows any difference between 2014 and 2015.

Section 5

Awareness of regulation

This section provides a summary of the findings relating to awareness of and attitudes towards media regulation. It also addresses issues surrounding the protection of children and the watershed.

5.1 Awareness of broadcast media regulation

Awareness that television programmes are regulated remains high among UK adults

- Eight in ten (79%) UK adults believe that TV programmes are regulated, with rules and guidelines about what can and can't be shown. Awareness of TV programme regulation is higher among adults aged 35-54 (85%) and 55-64 (89%), while the youngest and oldest adults have lower awareness (72% for 16-24s and 75% for over-65s). Adults in ABC1 socio-economic groups are also more likely to be aware (82% vs. 77% for C2DEs) as are men (82% vs. 77% for women).
- Since 2014, awareness of TV programme regulation has decreased (from 82% to 79%). This overall decline is evident among certain sub-groups (not shown in Figure 14), particularly among C2DEs 70% vs. 70% in 2014) and women (77% vs.81% in 2014). Awareness of TV regulation from 2011 to 2013 was higher; at around 88% to 89% of adults aged 16 and over.
- The arrows indicate any difference in awareness between 2014 and 2015, plus where adults in different age groups are more aware or less aware of regulation compared to all adults in 2015, where there are differences in this measure for adults in ABC1 and C2DE socio-economic groups and by gender in 2015.

Figure 14: Whether TV programmes are currently regulated (% of all adults)

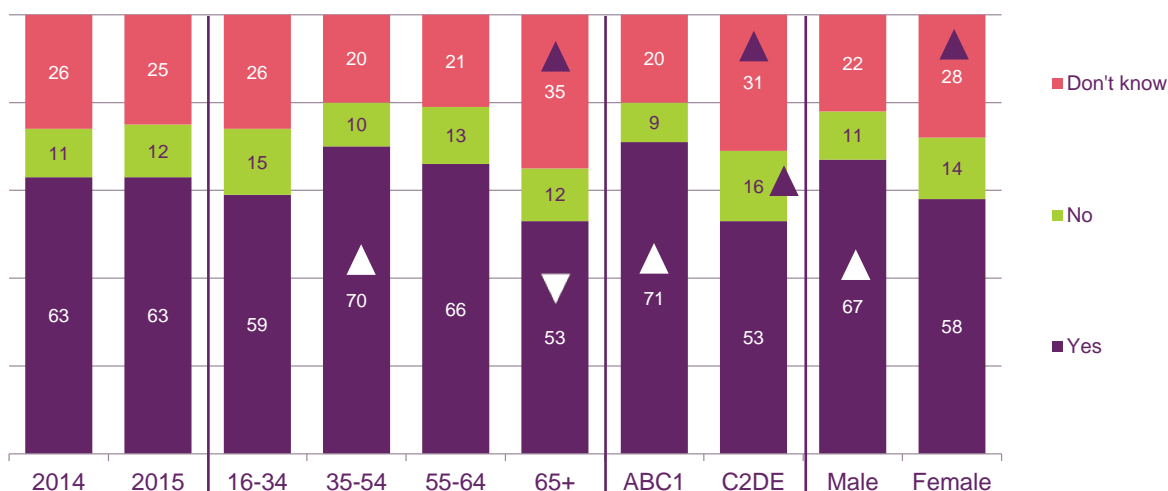


Source: Ofcom Media Tracker 2015. Q30 – As far as you know, are TV programmes regulated? Are there rules or guidelines about what can and can't be shown? Base: all in 2015 (2107); 16-34 (620); 35-54 (675); 55-64 (344); 65+ (468); ABC1 (1090); C2DE (1013); male (997); female (1110). Prompted, single code. Significance testing shows any difference between 2014 and 2015, between any age group and all adults, and any difference between socio-economic groups and by gender.

The proportion of adults aware that radio is regulated is unchanged since 2014

- Six in ten (63%) UK adults believe that radio is regulated, with rules and guidelines about what can and can't be broadcast. Awareness of radio regulation is higher among adults aged 35-54 (70%), those in ABC1 socio-economic groups (71% vs. 53% C2DE) and men (67% vs. 58% women). While a majority of over-65s are aware of radio regulation (58%), this is lower than among all adults (63%).
- There has been no change in awareness of radio regulation since 2014 (63%).
- The arrows in Figure 15 indicate where, in 2015, adults in different age groups are more aware or less aware of regulation compared to all adults, where there are differences in this measure for adults in ABC1 and C2DE socio-economic groups and by gender.

Figure 15: Whether radio is currently regulated (% of all adults)

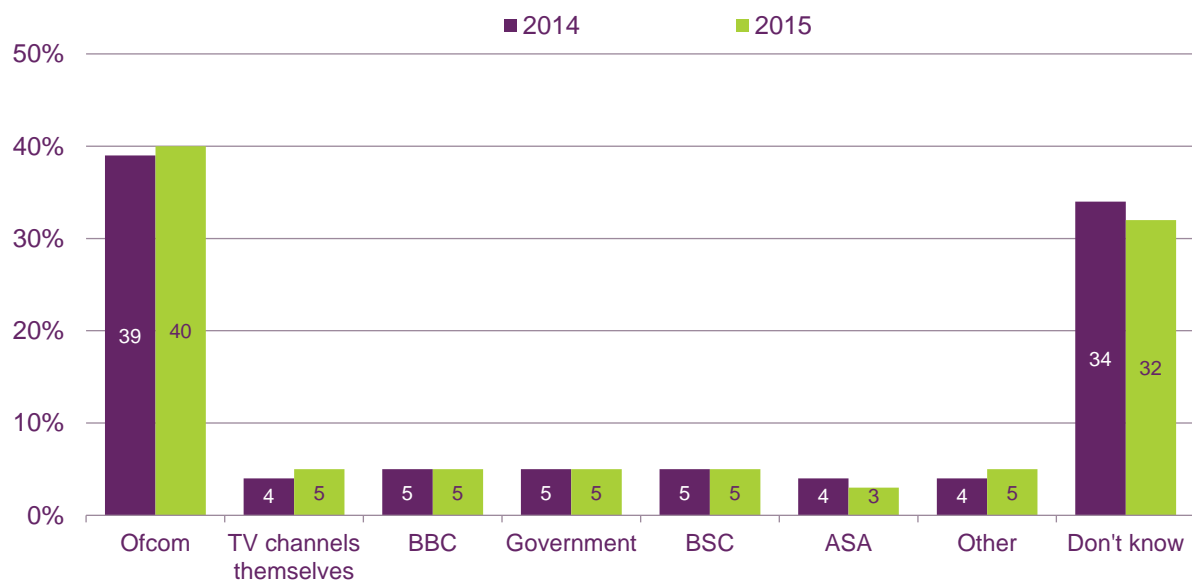


Source: Ofcom Media Tracker 2015. Q34 – As far as you know, is the radio regulated in terms of what can be broadcast? By regulation I mean rules or guidelines about what can and can't be broadcast. Base: All in 2015 (2107); 16-34 (620); 35-54 (675); 55-64 (344); 65+ (468); ABC1 (1090); C2DE (1013); male (997); female (1110). Prompted, single code. Significance testing shows any difference between 2014 and 2015, between any age group and all adults, and any difference between socio-economic groups and by gender.

The proportion of adults who believe that Ofcom regulates TV programmes is unchanged since 2014

- While most UK adults were aware that TV programmes are regulated, there was no consensus as to who was responsible for this. Six in ten (60%) of those who said TV programmes were regulated gave an incorrect response, or said they didn't know.
- Awareness among adults that Ofcom is the regulator for television (40%), and the proportion of adults unsure of who regulates TV content (32%) are both unchanged since 2014.

Figure 16: Opinion on who regulates TV programmes (% of adults aware of TV programme regulation)

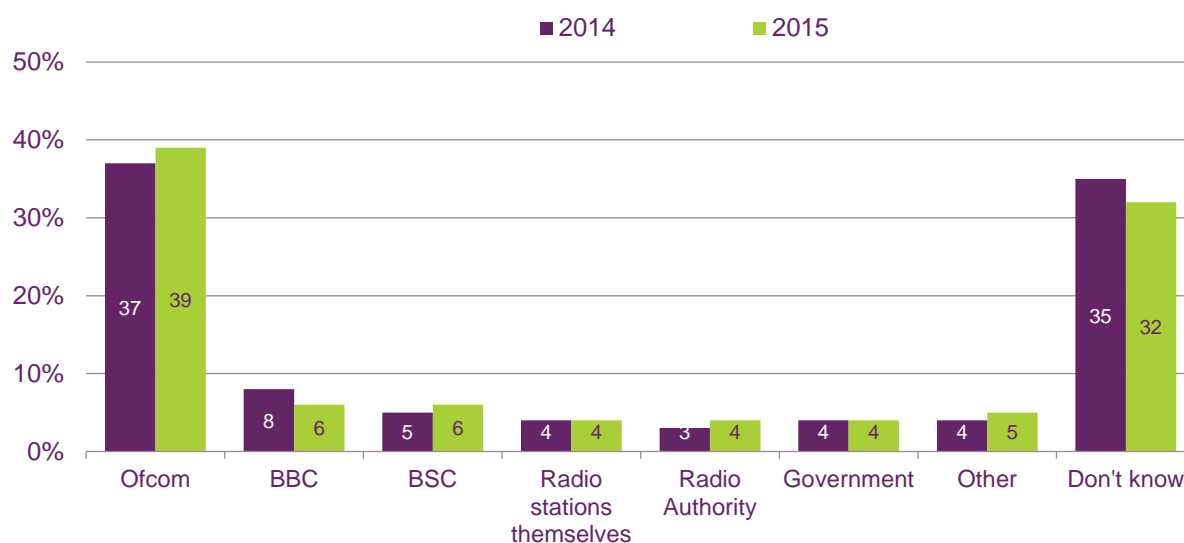


Source: Ofcom Media Tracker 2015. Q31 – Who do you think is responsible for regulating TV programmes? Base: All respondents aware of TV programme regulation 2014 (1485); 2015 (1446). Unprompted, single code. Significance testing shows any difference between 2014 and 2015.

The proportion of adults who think Ofcom regulates radio is unchanged since 2014.

- While most UK adults were aware that radio is regulated, there was no consensus as to who was responsible for this. Six in ten (61%) of those who said radio was regulated gave an incorrect response, or said they didn't know.
- Since 2014, there has been no change in awareness of Ofcom as the regulator for radio (39%) or in the proportion unsure of who regulates radio content (32%).

Figure 17: Opinion on who regulates radio (% of adults aware of radio regulation)



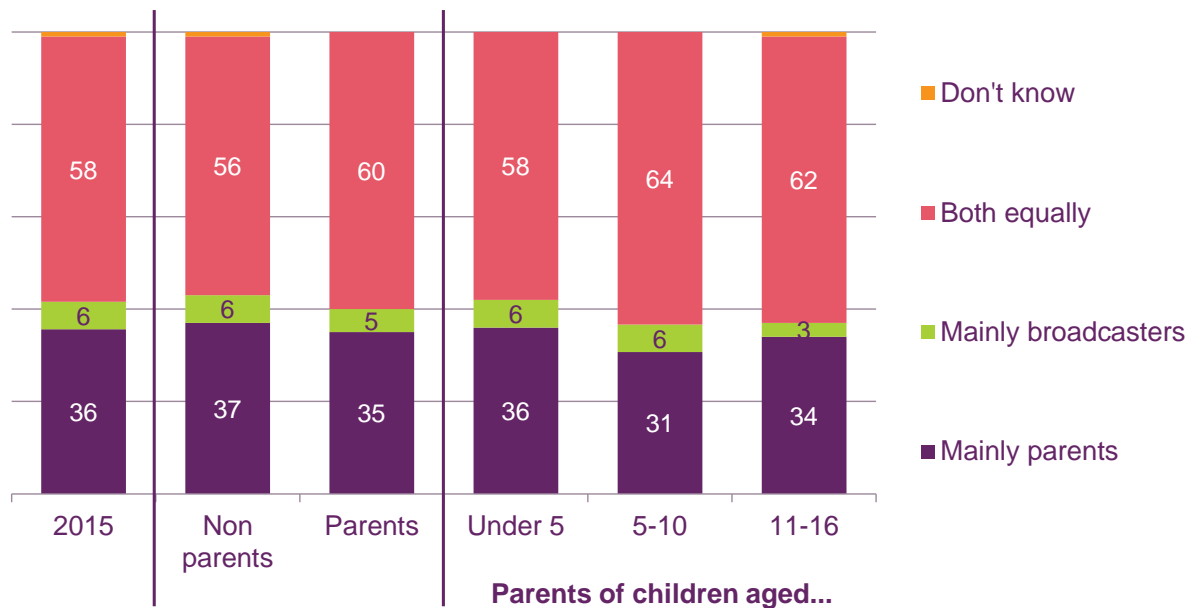
Source: Ofcom Media Tracker 2015. Q35 – Who do you think is responsible for regulating radio?
 Base: All respondents aware of radio regulation 2014 (1280); 2015 (1281). Unprompted, single code.
 Significance testing shows any difference between 2014 and 2015.

5.2 Protection of children and the TV watershed

The majority of adults believe that it is the equal responsibility of both parents and broadcasters to ensure that children are protected from unsuitable television content

- More than half (58%) of adult viewers felt it was equally the responsibility of parents and broadcasters to make sure that children did not see unsuitable programmes. Around a third (36%) felt it was mainly parents' responsibility, and 6% felt it was mainly the broadcasters' responsibility. Each of these measures is unchanged since 2014.

Figure 18: Opinion on whose responsibility it is to ensure children do not see unsuitable programming (% of adults with a TV)



Source: Ofcom Media Tracker 2015. Q37 - Do you think it is mainly the responsibility of the parents, the broadcasters, or both equally, to make sure that children don't see unsuitable programmes? Base: all with any TV sets (2052); non-parents (1458); parents (594); parents of children aged under 5 (297); 5-10 (360); 11-16 (278). Prompted, single code. Significance testing shows any difference between parents and non-parents and by age of child compared to all parents.

Awareness of the 9pm watershed remains high among UK adults

- As shown in Figure 19, nine in ten (90%) adult viewers were aware that broadcasters must not show television programmes that are unsuitable for children until after a certain time in the evening. This figure is unchanged since 2014, with awareness of the watershed consistently high since 2005.

Figure 19: Awareness of the TV watershed (% of adults with a TV)



Source: Ofcom Media Tracker 2015. Intro to question: Broadcasters are required to only show television programmes which are not suitable for children only after a certain time in the evening. Q38 - Before today, were you aware of this? Base: All with any TV sets (2052) Prompted, single code. Significance testing shows any difference between 2014 and 2015. Dashed line to show where survey method changed.

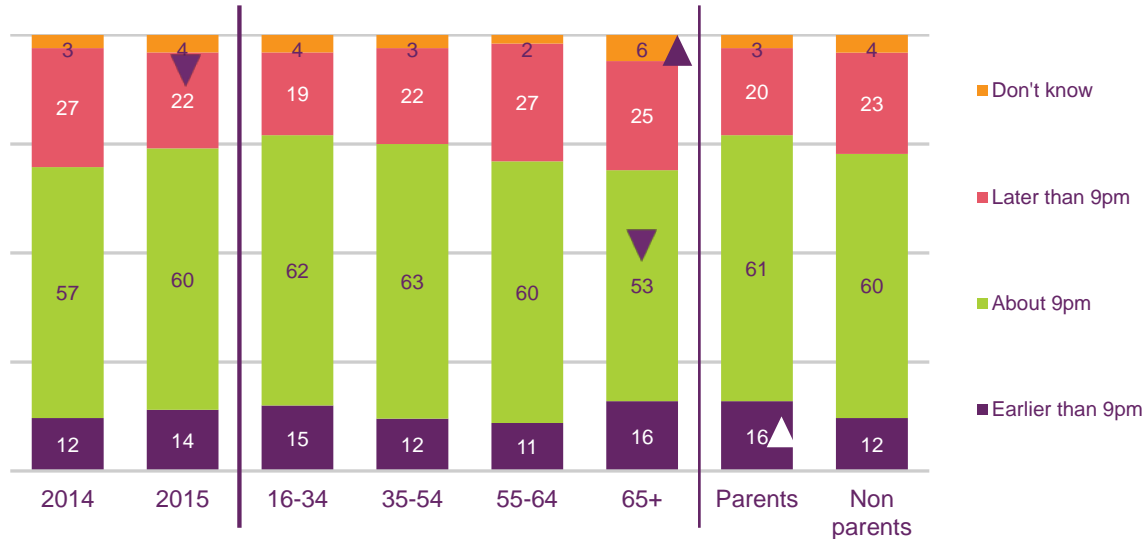
- Adult viewers were asked to say after which time in the evening programmes unsuitable for children can be shown on TV. Around four in five (78%) said this time was 9pm; unchanged since 2014. Awareness of the timing of the watershed is more likely than average among 55-64s (88% vs. 78%), and less likely among those aged 16-34 (69% vs. 78%) and among C2DEs (74%) compared to ABC1s (81%).
- When given the chance to choose a time at which TV channels *should* be allowed to broadcast programmes that may be unsuitable for children, 60% of adult TV viewers said “about 9pm” (Figure 20).
- One in five (22%) chose a time later than 9pm. Although this is less likely than in 2014 (27%), it continues to be a more likely response than a time earlier than 9pm, chosen by 14%.
- There is little variation by age, with the exception of over-65s, who were less likely to say that TV channels should be allowed to broadcast programmes unsuitable for children at ‘about 9pm’ (53% vs. 60%), while TV viewers in ABC1 households were more likely than those in C2DE households, to give this response (63% vs. 57%)⁹.
- Men were more likely than women to say ‘about 9pm’ (64% vs. 57%), while women were more likely to say that TV channels should be allowed to broadcast these types of

⁹ See Annex 1 slide 42

programmes earlier than 9pm (16% vs. 11%)¹⁰. As shown in Figure 20, parents were more likely than non- parents to give this response (16% vs. 12%).

- The arrows indicate any difference in opinions between 2014 and 2015, plus where opinions differ among adults in different age groups compared to all adults in 2015 and where there are differences in opinions between parents and non-parents in 2015.

Figure 20: Opinion on when TV channels should be allowed to broadcast programmes not suitable for children (% of adults with a TV)



Source: Ofcom Media Tracker 2015. Q40 - Programmes that are not suitable for children may be shown on TV channels after 9pm - usually known as the 9 o'clock watershed. Which of these best describes when TV channels should be allowed to broadcast programmes that may not be suitable for children? Base: All with any TV sets in 2014 (2016); 2015 (2052); 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462); parents (594); non-parents (1458). Prompted, single code. Significance testing shows any difference between 2014 and 2015, between any age group and all adults, and between parents and non-parents.

¹⁰ See Annex 1 slide 43

Section 6

Attitudes towards advertising and other commercial activities

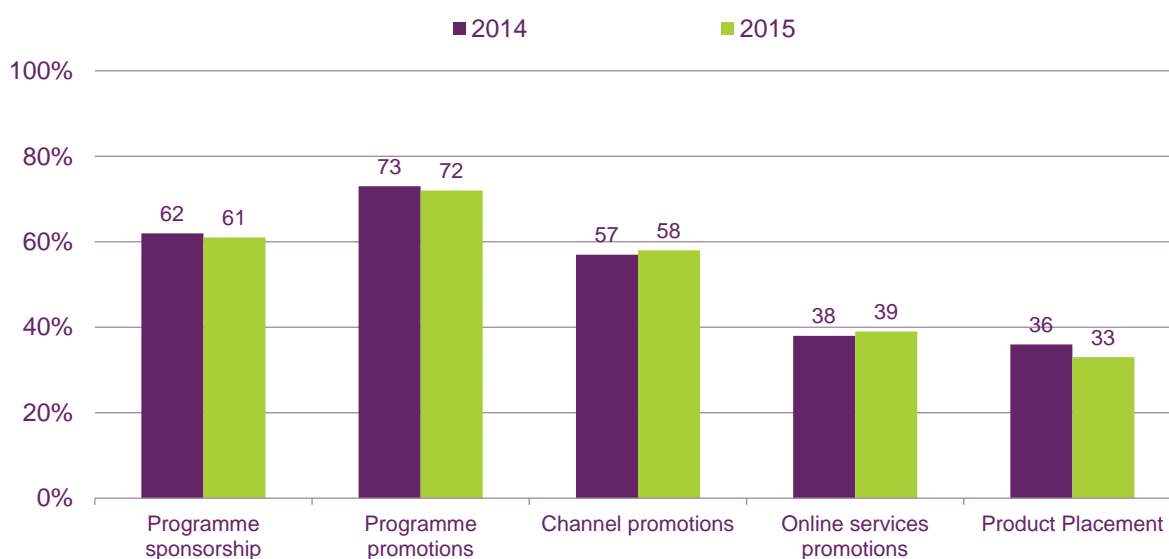
This section provides a summary of the findings relating to awareness of and attitudes towards television advertising and other commercial activities such as sponsorship, product placement and promotions. It examines viewers' opinions of the frequency and amount of television advertising as well as the volume of advertising on commercial radio.

6.1 TV advertising, sponsorship, product placement and promotions

Most adults are unaware of product placement on television

- Adult viewers were shown descriptions of different types of commercial messages on television, and were asked to say which they were aware of (Figure 21). More than half were aware of trailers or promotions for TV programmes (72%), programme sponsorship announcements (61%) and trailers or promotions for TV channels (58%). Less than half of adults were aware of trailers or promotions for TV channel websites (39%) or product placement (33%). These measures of awareness are unchanged since 2014.

Figure 21: Awareness of commercial messages (% of adults with a TV)

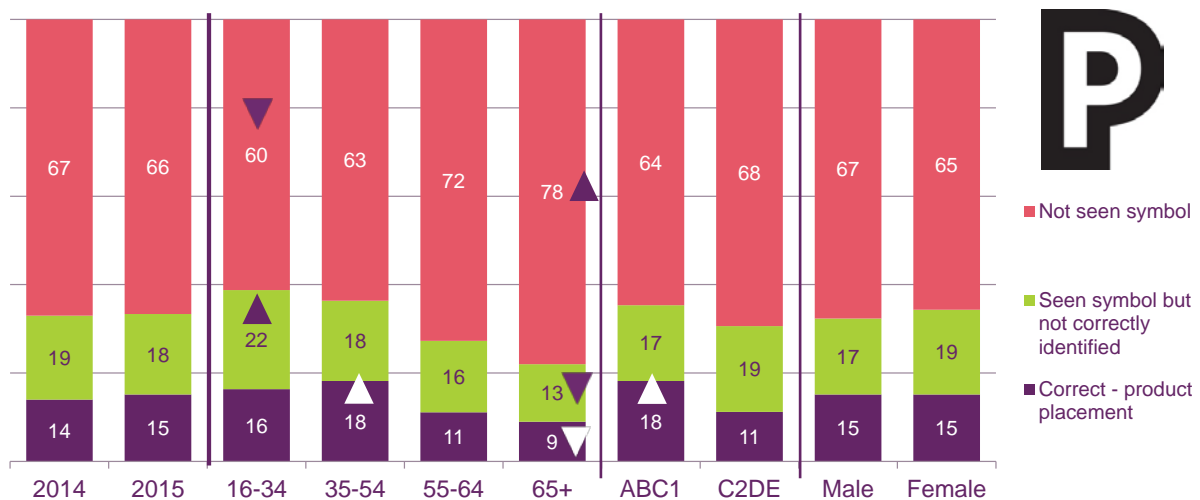


Source: Ofcom Media Tracker 2015. Q24 - Which of the following, if any, are you aware of on television? Base: all with any TV sets in 2014 (2016); 2015 (2052). Prompted, single code. Significance testing shows any difference between 2014 and 2015.

Only a minority of adults recognise the ‘P’ symbol to indicate product placement

- Adult viewers were shown the ‘P’ symbol (see Figure 22), designed to let viewers know that an Ofcom-licensed TV channel, or the programme-maker, has been paid to show products in that programme (i.e. product placement). They were then asked if they had ever noticed the symbol at the beginning or end of a TV programme, or following an advertising break. Those saying “yes” were asked if they knew – without any prompting – what the symbol meant.
- Among adult viewers, two-thirds (66%) said they had not seen the ‘P’ symbol, consistent with 2014. This response was more likely among over-65s (78%), and did not vary by gender or socio-economic group.
- A further 18% of adult viewers said they had seen the symbol, but could not correctly identify what it was used for. This response was more likely among adults aged 16-34 (22%), and again, did not vary by gender or socio-economic group.
- In total, 15% of adult TV viewers correctly identified that the symbol was used to indicate product placement in the TV programme. Adults aged 35-54 were more likely to be correctly aware of the product placement symbol (18% vs. 15%) as were ABC1 adults compared to C2DE adults (18% vs. 11%). Over-65s were less likely to correctly identify the symbol (9% vs. 15%).
- The arrows indicate where, in 2015, adults in different age groups are more aware or less aware of the ‘P’ symbol compared to all adults, and where there are differences in this measure for adults in ABC1 and C2DE socio-economic groups in 2015.

Figure 22: Awareness of product placement symbol (% of adults with a TV)



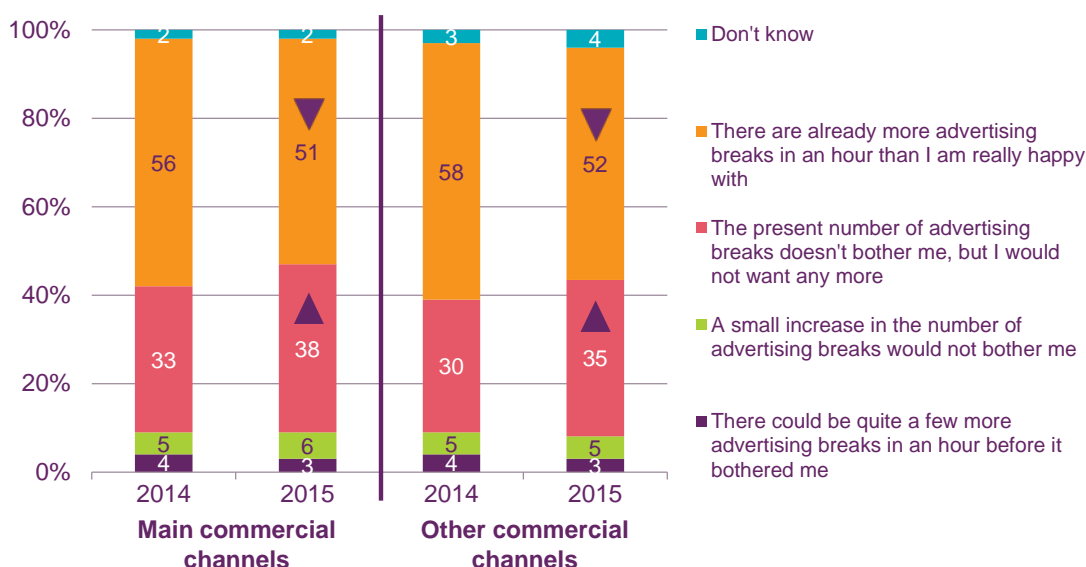
Source: Ofcom Media Tracker 2015. Q23 – Have you ever noticed this symbol featured at the beginning or end of a TV programme, or following an advertising break? IF YES - Do you know what this symbol is used for? Base: all with any TV sets in 2014 (2016); 2015 (2052); 16-34 (589); 35-54 (666); 55-64 (335); 65+ (462, ABC1 (1055); C2DE (993); male (966); female (1086). Prompted, single code. Significance testing shows any difference between 2014 and 2015 and between any age group or socio-economic group and all adults and by gender.

6.2 Frequency and amount of advertising

Half of all adults feel that the number of advertising breaks is already too high

- TV viewers were asked which of four statements best described how they felt about the frequency of advertising breaks on the main commercial free-to-air channels, as well as on the other commercial channels (Figure 23).
- Half of all TV viewers said there were already more advertising breaks in an hour than they were really happy with, both on the main commercial channels (51%) and on the other commercial channels (52%). TV viewers are less likely than in 2014 to give these responses (down from 56% and 58% respectively).
- Around two in five said the present number of advertising breaks on the main commercial channels (38%) and on the other commercial channels (35%) did not bother them, but they would not want any more; both of these responses have increased since 2014 (from 33% and 30% respectively).
- The arrows indicate where any opinion on the frequency of advertising breaks is more likely or less likely in 2015 compared to 2014.

Figure 23: Opinion of frequency of advertising breaks (% of adults with a TV)



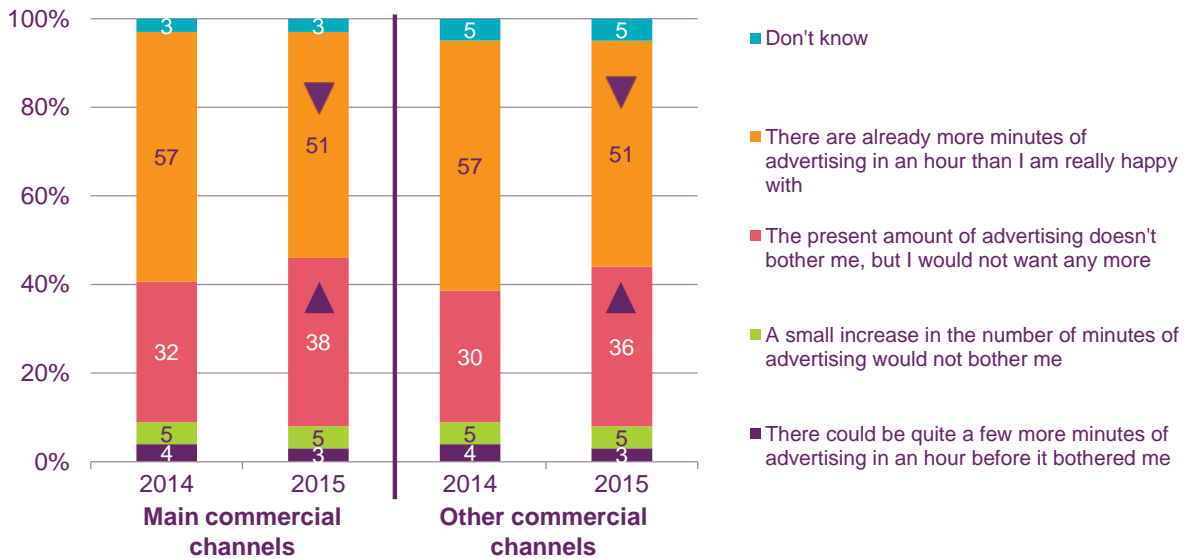
Source: Ofcom Media Tracker 2015. Q26 – Which of these statements best describes how you feel about the frequency of advertising breaks on the main commercial free-to-air channels – that is, ITV1, Channel 4 and Channel 5?

Q27 – And which of these statements best describes how you feel about the frequency of advertising breaks on the other commercial channels – all the other channels with adverts except for ITV1, Channel 4 and Channel 5. So, for example, ITV2, More4, Sky 1, The Discovery Channel, MTV.

Base: All with any TV sets in 2014 (2016); 2015 (2052). Prompted, single code. Significance testing shows any difference between 2014 and 2015

- TV viewers were also asked about the amount of advertising (in terms of the number of minutes) on both the main and other commercial channels (Figure 24).
- Half of TV viewers said there were already more minutes of advertising in an hour on the main commercial channels (51%) and on the other commercial channels (51%) than they were really happy with. Both these measures have decreased since 2014 (from 57% and 57% respectively).
- TV viewers were more likely than in 2014 to say that the present amount of advertising did not bother them, but they would not want any more, both for the main (38% vs. 32%) and the other (36% vs. 30%) commercial channels.
- The arrows indicate where any opinion on the amount of advertising is more likely or less likely in 2015 compared to 2014.

Figure 24: Opinion on amount of advertising on TV (% of adults with a TV)

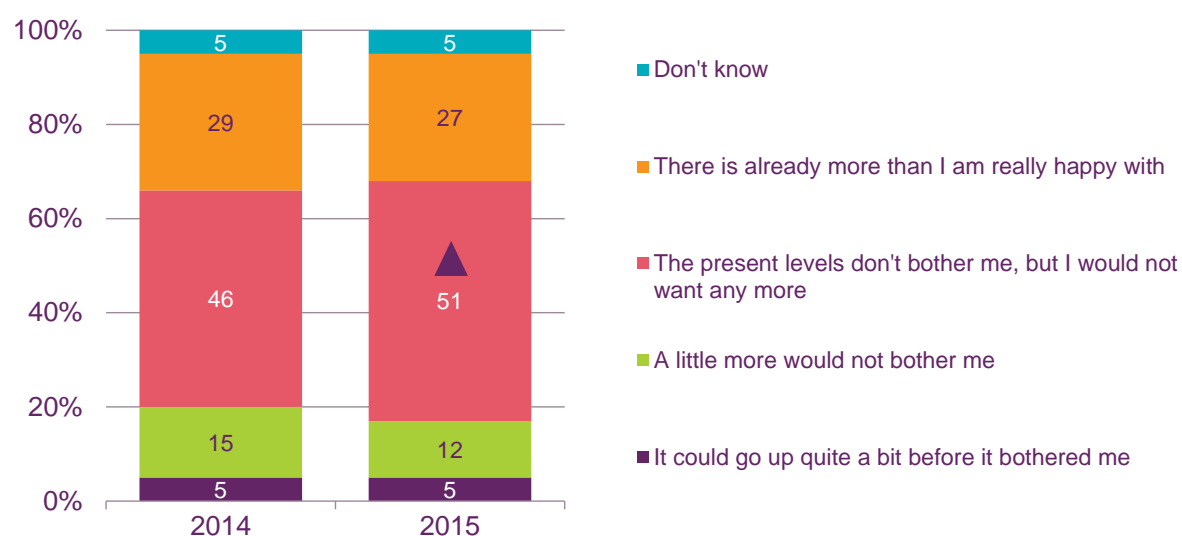


Source: Ofcom Media Tracker 2015. Q28 – Which of these statements best describes how you feel about the total number of minutes of advertising within an hour of programmes on the main commercial free-to-air channels – that is, ITV1, Channel 4 and Channel 5?
 Q29 – And which of these statements best describes how you feel about the total number of minutes of advertising within an hour of programmes on the other commercial channels – all the other channels with adverts except for ITV1, Channel 4 and Channel 5. So, for example, ITV2, More4, Sky 1, The Discovery Channel, MTV. Base: all with any TV sets in 2014 (2016); 2015 (2052). Prompted, single code. Significance testing shows any difference between 2014 and 2015

Most radio listeners are happy with current levels of advertising

- Commercial radio listeners (57% of all adults) were asked how they felt about the amount of advertising and programme sponsorship on commercial radio stations (Figure 25).
- Half of them said that the present levels of commercial activity didn't bother them, but they would not want any more (51%); this response is more likely than in 2014 (46%). Just under three in ten (27%) said there was already more than they were happy with, and one in eight (12%) said a little bit more would not bother them.
- The arrows indicate where any opinion on the amount of commercial activity on radio is more likely or less likely in 2015 compared to 2014.

Figure 25: Opinion on amount of commercial activity on radio (% of adults who listen to commercial radio stations)



Source: Ofcom Media Tracker 2015. Intro before question: Advertising and sponsorship provide income for commercial radio stations. Without income from advertising and sponsorship, commercial radio stations may not exist.

Q57 – With this in mind, which of these statements best describes how you feel about the amount of advertising and programme sponsorship (for example sponsorship of the weather or a competition) on commercial radio stations?

Base: All who listen to commercial radio stations in 2014 (752); 2015 (1165). Prompted, single code. Significance testing shows any difference between 2014 and 2015