



Public Service Broadcasting: Annual Report 2009

Research Document

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Introduction

Ofcom has a duty to assess the designated public service broadcasters, taken together, in terms of their delivery of the public service purposes set out in the 2003 Communications Act. We have used the methodology developed in our first PSB review.

This is the third in our series of Public Service Broadcasting Annual Reports, Ofcom's statistical evidence base for assessing the delivery of public service broadcasting (PSB). The designated PSB broadcasters are the BBC, Channel 3/ITV1, GMTV, Channel 4, Five, S4C and Teletext¹. The report is intended to provide an up-to-date evidence base of the current delivery of public service content in the UK and gives a factual account of broadcast hours, viewing figures and audience opinions of the channels over the last five years. We have also included some spend figures for the first time, to show trends in investment in public service content.

The UK media landscape has undergone huge changes since the publication of the first PSB Annual Report, brought about by increasing audience fragmentation and the significant pressure on advertising revenue in broadcasting. As a result, we commissioned our second PSB review one year earlier than the statutory requirement, with the final statement, *Putting Viewers First*, published in January 2009.

In *Putting Viewers First* we made recommendations to government and parliament for maintaining the widespread availability of public service content across a range of digital media. These included a re-balancing of public service obligations across the sector; on one hand, securing the economic future of strong institutions which have public purposes at their heart (the BBC and Channel 4); on the other, freeing up commercial networks while retaining modest public service commitments consistent with the commercial value of the licences. We also highlighted particular challenges facing commercial provision of news programming in the nations and regions, programming for older children and non-news programming in the nations.

Since then, the government has published its *Digital Britain* report, setting out its response to our recommendations, including pilot proposals for local news consortia to provide news in the English regions and devolved nations, as an alternative source to the BBC. The report also set out a consultation on opening up a contained, contestable element of the television licence fee for funding local news and other potential uses.

In a challenging economic environment, the 2009 PSB Annual Report shows continued declines in investment in public service content on the five main PSB channels, with first-run originated output spend down by just under 15% since 2004 and viewing down by a similar amount. Yet the evidence also shows that people value PSB content more than ever, with increasing opportunities to consume content in ways which suit them, whether via digital video recorders, the BBC iPlayer or the increasing range of on-demand services available on both TV and the internet.

With rapid changes in the nature of the way PSB is delivered, the PSB Annual Report will need to adapt its measurement methodology in the future to reflect new forms of access and consumption.

¹ On July 16 2009, the Daily Mail & General Trust plc announced that it plans to end the transmission of the analogue Teletext services and a number of its digital television services in January 2010.

Executive Summary

Spend, output and viewing

Spend on all network programming by the five main PSB channels has decreased over the last five years, by 10%, reducing from a total of £3,110 million in 2004 to £2,799m in 2008. Within this figure, while spend on repeats and acquired programmes has increased, the amount spent on first-run originations has fallen by £339m since 2004 to £2,314m in 2008, a real-terms fall of just under 15%².

Since 2004, total expenditure on all programmes broadcast has declined on most of the five main PSB channels, with the exception of Five, where spend increased by just under 1%. Spend on BBC One and BBC Two combined decreased by 13%, whilst spend across the commercial channels (ITV1³, Channel 4 and Five) fell by 8%.

The volume of first-run originated programmes on the five main PSB channels in 2008 was 33,177 hours a year; a slight decrease on levels seen in 2004 (by 1099 hours or 3%).

Against this background of decreasing spend and first-run originated hours of programming, average hours of viewing on the five main PSB channels fell by 15% between 2004 and 2008, at 2.3 hours a day per person in 2008. Reductions were seen for all age groups and were greatest among children and people aged 44 and under.

The wider context is that there was no decrease in the average hours of viewing to *all* television channels, taken together, for the average viewer from 2004 to 2008. While from 2007 to 2008, viewing of any television channel increased for all age groups, except those aged 16 to 24.

The combined viewing share of the five main PSB channels declined from 75% in 2004 to 61% in 2008. In peak time it declined by 12 percentage points, from 80% in 2004 to 68% in 2008. ITV1 had the largest drop in peak-time share, from 29% to 23%, and BBC One also had a drop of 3% over this period. Historically, ITV1 has achieved a greater peak-time share of viewing than BBC One, but in 2008 BBC One's peak-time share was 24% while ITV1's was 23%.

Alongside the decreases in viewing of the five main PSB channels, there has been a steady increase in average weekly reach of all of the PSB portfolio channels combined (both PSB and commercial) since 2004; from 53% in 2004 to 69% in 2008.

Output and viewing of key genres

News and Current Affairs

Expenditure on network⁴ News and Current Affairs programmes by the five main PSB channels showed a fall of £39m or 14%, from £289m in 2004 to £250m in 2008.

² Figures exclude nations/regions programming.

³ Throughout this document we refer to the Channel 3 regional licensees by the most commonly-used collective terms: ITV1, or simply ITV. However, these terms are not used within the devolved nations. Channel 3 is referred to as STV in northern and central Scotland, UTV in Northern Ireland and ITV1 Wales in Wales. Where appropriate, therefore, we refer to STV, UTV and ITV1 Wales separately.

⁴ This excludes nations/regions programming.

The volume of UK/national network News across the whole day fell by 7% between 2005⁵ and 2008. Peak-time News output increased in 2008 to a level closer to that seen in 2005 (901 hours in 2008 compared to 928 hours in 2005) after two years of lower output. This was largely driven by ITV1's increased peak-time News provision with the re-introduction of *News at Ten*.

Viewing of UK/national News on the main five PSB channels fell by 9% between 2004 and 2008. The largest decrease was for ITV1 (down by six hours or 21%).

Nations and regions News output and viewing varies by area:

- In England, while there was a steady growth in the volume of BBC nations/regions News and Current Affairs programming between 2004 and 2008, volume on ITV remained relatively stable over the period despite falls in 2006 and 2007.
- In Scotland, STV nations/regions News and Current Affairs fell by 22% between 2004 and 2008
- In Wales, the BBC reduced its nations/regions News output by 18% between 2004 and 2008, while ITV1 output remained broadly stable.
- In Northern Ireland, the BBC increased the amount of nations/regions News and Current Affairs broadcast by 20% between 2004 and 2008, while UTV decreased output by 14%.
- Network share of viewing for Channel 3 nations/regions News decreased from 22% in 2004 to 19% in 2008. BBC nations/regions News share was down slightly, from 30% in 2004 to 28% in 2008.

Factual programming

The expenditure on network programmes⁶ by the five main PSB channels has fallen less steeply for Factual programmes than for most other genres; by 4% or £17m.

There was an increase in the volume of Factual output across the five main PSB channels, and BBC Three and Four, between 2004 and 2008 – and since 2007 in particular. Increases in the last three years were driven mainly by a large rise in the volume of Other Factual programming (an increase of 52% since 2006), although both Specialist Factual and Factual Entertainment increased (by 4% and 7% respectively over this period).

Five particularly increased its Specialist Factual output from 2006 to 2008 (by 84%). This consisted mainly of repeats of natural history and other documentaries. The BBC decreased its volume of Specialist Factual by 7% over the same period.

Viewing of Specialist Factual on the PSB channels decreased by 21% between 2004 and 2008. The most marked decrease in viewing hours of Specialist Factual was for BBC One (from eight to five hours a year).

⁵ The data series excludes 2004 as the figures were not comparable due to changes in the allocation of programmes to the News and Current Affairs genres.

⁶ This excludes nations/regions programming.

Children's programming

UK first-run originated hours of Children's programmes broadcast on the five main PSB channels and on CBeebies/CBBC fell by 51% between 2004 and 2008. Investment in first-run originated children's programming by these channels fell by just over a third between 2004 and 2008, with spend by the commercial PSBs down from £42m to £11m.

There was also a reduction in the proportion of viewing by children of the Children's genre on the five main PSB channels (32% in 2004 to 12% in 2008). Despite increased viewing on the BBC digital children's channels (from 15% in 2004 to 24% in 2008), there was an overall decrease in the proportion of viewing on the five main PSB channels and BBC digital channels combined (47% in 2004 to 36% in 2008).

Audience impact

Despite the decline in viewing of the five main PSB channels, the proportion of the PSB audience that rated the PSB channels *together* highly was larger in 2008 than in at least one of the previous two years, across almost all of the research statements that reflect the purposes and characteristics of PSB.

Regular viewers gave more positive opinions about *individual* channels for many of the research statements in 2008, compared to either 2007 or 2006. For example, there was an increase in the proportion of regular viewers who rated channels highly for three or more of the five main channels on 11 out of 17 statements in 2008, in comparison to either 2006 or 2007

However, not all statements showed such widespread positive shifts in opinion:

- *Its nations/regions News provide a wide range of good quality news about my nation/region.* No channel saw an increase in ratings among regular viewers over time in any nation.
- *Aside from News, it provides a range of good quality programmes about my nation.* No channel saw an increase in ratings among regular viewers over time in any nation.
- *I trust this channel.* Only BBC Two saw increases in the proportion of regular viewers who rated the channel highly on this.
- *Engaging – it shows programmes I want to watch.* Only Five increased the proportion of its regular viewers who rated the channel highly on this, while BBC One saw a decrease in this measure.

PSB Channel performance

BBC One retains its core strengths relating to purpose 1 and its ability to *help viewers understand what's going on in the world today* and having *trustworthy news programmes*.

BBC Two continued to be rated highly by its regular viewers on many of the characteristics and elements of purpose 2 – *stimulating knowledge and learning*.

ITV1 did not show the same degree of improvement as other channels on purposes and characteristics statements between 2007 and 2008, increasing its rating only on the characteristic of *quality*.

Channel 4 strengthened its ratings among regular viewers on some of its key measures, including *programmes with new ideas and different approaches* and *challenging – shows programmes that make me stop and think*, and *increasing viewers' interest in particular*

subjects. These positive shifts brought Channel 4 up to or higher than, the other channels with strengths in these areas.

Five did not strengthen its ratings on any of the purposes and characteristics among its regular viewers between 2007 and 2008, although did experience more positive ratings on the majority of characteristics from 2006.

As BBC Three and BBC Four have become more established, regular viewers' opinions of these channels have strengthened across almost all aspects of the PSB purposes and characteristics. On many measures in 2008, ratings of these channels among their regular viewers are at the same level, or are stronger than, ratings achieved by the five main PSB channels.

The dedicated Children's channels, CBBC and CBeebies, received high ratings on *offering a wide range of high-quality and UK-made programmes for children* from the parents of children regularly watching them; 71% rated CBBC highly and 82% rated CBeebies highly on this measure in 2008.

UK television market developments

The UK television market is changing rapidly, with continuing take-up of digital television, the take-up and use of DVRs, use of video-on-demand (VoD), online availability of content and HD availability and use.

There are indications that the growth of digital TV and non-linear viewing are enhancing the viewing experience for some people. For example:

- Recent consumer research⁷ has examined the viewer perspective of on-demand services in their broadest sense (DVRs, iPlayer and VoD) and found that most participants expect to watch 'better' TV rather than more TV as on-demand services evolve.
- Ofcom commissioned research in March 2009 into non-linear TV viewing and viewing experiences⁸. We found that viewers of on-demand services claim that it enhances their viewing experience; 78% of users of TV on-demand services agreed that they '*watch more programmes that I enjoy because of on-demand services through the TV*', 80% of DVR users said they '*watch more programmes that I enjoy because of my DVR*', and 65% of online TV content users said they '*watch more programmes that I enjoy because of having access to TV content online*'.
- BBC Pulse⁹ data shows that 44% of responses to programmes in 2005 were '*a special effort to view*' but this increased to 49% in 2008.
- Ofcom research in March 2009 also found that among those with access to digital channels, two-thirds (68%) said that they '*watch more programmes that I enjoy because of having digital channels*', and among all adults two-fifths (44%) agreed that '*the quality of programmes on the BBC channels, ITV1, Channel 4 and Five has generally increased in the past year*'.

⁷ Research carried out by Essential Research <http://www.essentialresearch.co.uk/>

⁸ See section 3 for more detail. Telephone omnibus carried out by GfK NOP in March 2009.

⁹ The Pulse survey is a BBC-GfK online, nationally-representative panel of over 19,000 viewers that collects responses on programmes that were viewed on the previous day.

- When people were asked to what extent they agreed or disagreed that they, '*appreciate [the main PSB] channels and their programmes more than I did in the past*', 25% of adults agreed. Those with multichannel TV were more likely to agree with this statement than those with analogue-only television.

Background

Assessment of PSB

Ofcom has a duty to assess the designated public service broadcasters, taken together, in terms of their delivery of the public service purposes as set out in the 2003 Communications Act. The designated PSB broadcasters are the BBC¹⁰, ITV1¹¹, GMTV, Channel 4, Five, S4C and Teletext¹².

The public service purposes outlined in the Act were¹³:

- to deal with a wide range of subjects;
- to cater for the widest possible range of audiences – across different times of day and through different types of programme; and
- to maintain high standards of programme-making.

Within Phase 2 of Ofcom's first PSB Review¹⁴ in 2004, we recommended that PSB should be defined in terms of a fuller list of PSB purposes and characteristics. Phase 3 of the first PSB Review¹⁵ also outlined that Ofcom would develop a new approach to assessing the effectiveness of public service broadcasters, taken together, in delivering these PSB purposes and characteristics, resulting in the publications of the PSB Annual Reports.

This is the third of Ofcom's PSB annual reports. It sets out to provide an evidence base for assessing the delivery of public service broadcasting (PSB). Its purpose is to enable both Ofcom and its stakeholders to gain a deeper understanding of the current position of PSB delivery in the UK, and how this has changed over the last five years. The report does not report on individual broadcasters' compliance with quotas; these are published in Ofcom's annual Communications Market Review.

While the key purpose of this report is to show how PSB is being achieved in the UK, it must also look at the contributions of the individual PSB channels. This is not, however, designed to provide an assessment of the individual performance of the public service broadcasters.

Purpose and characteristics

This PSB report is framed largely according to the PSB purposes and characteristics set out in Ofcom's first PSB Review, conducted throughout 2004 and reported on in 2005. These

¹⁰ The BBC PSB channels are BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. Note: the focus is upon generalist channels.

¹¹ Throughout this document we refer to the Channel 3 regional licensees by the most commonly used collective terms, ITV1, or simply ITV. However, these terms are not used within the devolved nations. Instead Channel 3 is referred to as STV in north and central Scotland, UTV in Northern Ireland and ITV1 Wales in Wales. Where appropriate, therefore, we refer to STV, UTV and ITV1 Wales separately.

¹² On July 16 2009, the Daily Mail & General Trust plc announced that it plans to end the transmission of the analogue Teletext services and a number of its digital television services in January 2010.

¹³ See clause 264 of the Communications Act 2003 for the full wording and more detail on these.

¹⁴ http://www.ofcom.org.uk/consult/condocs/psb2/psb2/psb_phase2.pdf

¹⁵ <http://www.ofcom.org.uk/consult/condocs/psb3/psb3.pdf>

PSB purposes and characteristics are outlined in Figure 1. There are also specific sections focusing on Children’s television, Teletext, the devolved nations and English regions.

Figure 1: PSB purposes and characteristics

<p>PSB purposes</p> <p>Informing our understanding of the world - To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas</p> <p>Stimulating knowledge and learning -To stimulate our interest in and knowledge of arts, science, history and other topics through content that is accessible and can encourage informal learning</p> <p>Reflecting UK cultural identity - To reflect and strengthen our cultural identity through original programming at UK, national and regional level, on occasion bringing audiences together for shared experiences</p> <p>Representing diversity and alternative viewpoints - To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere</p>
<p>PSB characteristics*</p> <p>High quality - well-funded and well-produced</p> <p>Original – new UK content rather than repeats or acquisitions</p> <p>Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones</p> <p>Challenging – making viewers think</p> <p>Engaging – remaining accessible and attractive to viewers</p> <p>Widely available – if content is publicly funded, a large majority of citizens need to be given the chance to watch it</p>

* Although *trust* is not a PSB characteristic as outlined in the PSB Review in 2004, it is considered alongside these characteristics throughout the report. The reasons for this are explained later in this section.

Although the PSB channels are expected together to fulfil the purposes and characteristics, within the PSB system, it is also acknowledged that each PSB channel has a different remit (with access to different funding sources and different institutional approaches). These are summarised by Ofcom as¹⁶:

- The BBC is the cornerstone of PSB, with special responsibility for investing in distinctive content and always striving to meet PSB purposes and characteristics
- ITV1 focuses on News and high production-value origination from around the UK. ITV1 has additional responsibility for the provision of regional News, Current Affairs and other regional programming¹⁷
- Channel 4 has a specific remit for innovation, educative programming and distinctiveness
- Five is primarily market-led with a focus on UK original production
- S4C has a key role in Welsh language public service broadcasting

¹⁶ *Phase 3 – Competition for quality: Ofcom review of public service television broadcasting*, February 2005.

¹⁷ The requirements within these areas have been revised following the publication of Ofcom’s statement on short term regulatory decisions in parallel with Ofcom’s Second Public Service Broadcasting Review phase 2: preparing for the digital future, January 2009. For more detail see http://www.ofcom.org.uk/consult/condocs/psb2_phase2/shortterm/

- Teletext has a remit for a range of high quality and diverse text material

The PSB purposes and characteristics are deliberately looser than the formal quotas for annual hours of particular genres. Their development was in recognition of the fact that some television programme genres are becoming less distinct, and can vary significantly in the degree to which they can be described as 'PSB'. However, this is not to say that analysis of genres cannot provide useful contextual information and therefore where the link between a genre and purpose or characteristic is particularly relevant, data about this genre have been reported appropriately.

Figure 2 sets out the programme genres that are deemed most applicable to each of the PSB purposes, and these are used as context in this report.

Figure 2: PSB purposes and their applicability to programme genres

PSB purpose	Most relevant programme genres
Purpose 1: Informing our understanding of the world	<ul style="list-style-type: none"> • UK/national News • Current Affairs • Nations and regions News and Current Affairs
Purpose 2: Stimulating knowledge and learning	<ul style="list-style-type: none"> • Factual • Arts • Music • Education • Religion • Children's <i>Note: this is reported within a separate section within this report.</i>
Purpose 3: Reflecting UK cultural identity	<ul style="list-style-type: none"> • Nations and regions non- News programming <i>Note: this is reported within the sections on each devolved nations and the English regions within this report.</i>
Purpose 4: Representing diversity and alternative viewpoints	<ul style="list-style-type: none"> • No specific genres are explicitly linked to this purpose – many genres can support it
Other genres that may deliver across purposes	<ul style="list-style-type: none"> • Sport • Drama • Comedy <i>Note: given that these genres may be contributing to a variety of purposes, these are reported in a separate section within this report.</i>

Current PSB context

This report provides an evidence base for Government and Parliament in developing policy for public service broadcasting, including the Government proposals in *Digital Britain*¹⁸ and any future reviews of public service broadcasting. The second PSB Review *Putting Viewers First* focused on how to ensure the delivery of content which fulfils public purposes and meets the interests of citizens and consumers in the evolving broadcasting sector. This review concluded in January 2009¹⁹. The main recommendations are outlined below (see

¹⁸ BERR and DCMS, *Digital Britain: The Final Report* (16 June 2009)

¹⁹ For more detail see http://www.ofcom.org.uk/tv/psb_review/

Figure B). Following the review, Ofcom also made regulatory changes, effective from 2009, designed to benefit PSB in the short term²⁰ (see Figure C).

Figure B: PSB Review – Main conclusions and recommendations to Government and Parliament: 2009

Ofcom’s Second Public Service Broadcasting Review: Putting viewers first

The review concluded that the existing model of commercial public service broadcasting was no longer sustainable and that difficult decisions about the use of scarce resources would need to be made by Government.

Main priorities are:

- To maintain the BBCs role and funding for its programmes and services at the heart of the overall system.
- To support investment in, and wide availability of, high quality original programming and UK and international news, by positioning the Channel 3 and Channel 5 services as commercial networks with a limited public service commitment, with modest licence benefits balanced by appropriate obligations on a sustainable basis.
- To plan now to ensure the supply of a choice of high quality news alongside the BBC in the devolved nations and English regions. This should include developing proposals for a new approach based on independently funded news consortia.
- To ensure there is a financially robust alternative provider of public service content alongside the BBC, with Channel 4 at its heart, preferably based on partnerships, joint ventures or mergers, with the scale necessary to sustain effective delivery of public purposes across digital media. A new remit, governance and accountability will be essential.

Figure C: Short-term regulatory decisions: 2009

Statement on short term regulatory decisions		
<i>Issue</i>	<i>Licensee/channel</i>	<i>Summary of Ofcom’s proposal</i>
Volume of regions and nations News slots	All channel 3 regions	Allow reduction in volume from 5h 20m to 4h per week reflecting loss of mid-morning and weekend daytime bulletins; 3h 45m in English regions. Peak-time (1800-2230) requirement would remain
Volume of programming other than news for Wales	ITV plc	Reduce quota from 4h per week in 2008 to 90 min per week, maintaining as now 45 minutes in peak, 30 min in near-peak (1700-1800, 2230-2330). Current affairs within this to remain at present level of 47min per week.
Volume of programming other than news in Scotland	stv	Reduce quota from 4h per week in 2008 to minimum of 90 min per week (as with ITV Wales, peak, near-peak and current affairs elements within this to remain at present levels). Reductions in Gaelic obligations in line with intentions of Ofcom’s first PSB Review.
Volume of programming other than news in Northern Ireland	UTV	Reduce quota from 4h per week in 2008 to minimum of 2h per week (as with ITV Wales and stv, peak, near-peak and current affairs elements within this to remain at present levels)
Pattern of regional news programmes in some regions	ITV plc	Merger of news services in: Border and Tyne Tees; West and Westcountry; Thames Valley and Meridian. This except for leading stories of 15 mins duration in 6pm weekday programme, and full 9 min bulletin after <i>News at Ten</i> . These would remain separate for each region. Separate subregional output in Central East/West; Anglia East/West; and Yorkshire East/West would reduce to 6 mins within 6pm programme and full bulletin after <i>News at Ten</i> .

²⁰ For more detail see http://www.ofcom.org.uk/consult/condocs/psb2_phase2/shortterm/

Volume of content other than news for English regions	ITV plc	Reduce quota from 30 min per week previously agreed for 2009 to 15 min, all in peak and near-peak. This may be accommodated in news slots.
Volume of combined news and other content	Channel TV	Reduce quota from 5h 38m to 4h per week
Volume of network current affairs	All Channel 3 regions	Reduce from 90 min per week to 50 min from 2010 (40 min in peak, as now)
Out-of-London network production quota	All Channel 3 regions	Reduce spend and volume quotas from 50% to 35%
Out-of-London production quota	Channel 4	Increase spend and volume quotas from 30% to 35%, of which a minimum 3% from outside England from 2010. Review both quotas when future of Channel 4 is clearer.
Original production quota	Five	Reduce quota for original productions from 53% to 50% (and 42% to 40% in peak)
Pages of news and content other than news	Teletext	Reduce number of regional news regions from 19 to 13, while increasing page count in each region by 40%; cut regional coverage of content other than news on analogue; reduce national news volume

Statements of programme policy (SOPPs)

The report also aims to provide objective evidence to inform licensees' annual statements of programme policy (SOPPs) and self-assessment reviews (SARs).

The annual process by which independent PSB broadcasters produce statements of programme policy, and reviews of the previous year's output is a statutory requirement for broadcasters, introduced by the 2003 Communications Act.

Broadcasters are required to complete their statements and reviews each year in accordance with Ofcom guidance, which is published in the form of a Guidance Note. The independent PSB broadcasters are the ITV1 network; Channel 4; Five; GMTV²¹; Teletext; and the 15 ITV nations/regions²². The BBC and S4C have different arrangements, but nonetheless produce their own statements and reviews. This report provides context for these publications.

Research methodologies

The main tools through which PSB is monitored in this report are as follows:

Cost data: the expenditure on programming by the PSBs.

Output hours: the number of hours broadcast.

Viewing figures: who is watching the output, and for how long.

Audience impact: what viewers think of the output.

²¹ GMTV holds a separate licence from ITV1 and has separate obligations and commitments.

²² The English regional licences held in common ownership and the two STV licences are able to submit consolidated statements and reviews. Individual statements and reviews are required from UTV, Channel Television and ITV Wales.

For the purposes of consistency, output hours, viewing figures, and audience impact tend to be reported on for all genres and purposes/characteristics for all channels throughout this report. However, the text makes it clear where individual channels have a particular remit, or where channels should not be expected to make a PSB contribution.

There are a number of factors to note in relation to these data sources.

Cost data

Programme costs represent the total cost of production or acquisition, including rights costs but excluding third party investment. In the case of commissions, it represents the price paid to the independent producer (and therefore includes a mark-up on production costs).

Trend data showing programme costs over a number of years is given in 2008 prices (i.e. taking account of inflation, using the Consumer Prices Index, as provided by the National Statistics Office).

Output hours

The output data in this report are collected by Ofcom from the broadcasters each year, as part of their PSB returns. The period 2004-2008 is shown.

Genre definitions

It should be noted that programme classifications were updated in 2006 and therefore the figures for certain genres may be slightly different from earlier reported figures. These are noted in the narrative where relevant²³. The new structure for the allocation of programmes to genre categories became effective in 2006, to allow broadcasters more flexibility in the classification of programmes to particular genres. It has not been possible to go back and re-classify pre-2006 data, therefore analysis of trends using the new breakdowns is not possible for the full five years reviewed in this report.

The following changes should be noted in the composition of the figures 2006 and later:

- Drama includes TV movies which were previously added to Films. Entertainment includes contemporary music but Comedy is now shown separately and includes situation comedy and scripted comedy.
- Specialist Factual includes Science & Technology, History, Nature & Wildlife and other documentaries.
- Other Factual includes Hobbies & Leisure, Factual Magazines, Consumer Magazines and General Factual.
- Factual Entertainment includes reality shows. In previous years some Factual Entertainment programmes were included within Entertainment.

Definition of peak time

The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three and BBC Four peak time runs from 7pm (when broadcasting starts on these channels) to 10.30pm.

²³ The full list of genre definitions are given in Annex 1.

Viewing figures

These data are provided by BARB (Broadcasters' Audience Research Board), a panel of 5,100 homes providing TV measurement for the industry.

The majority of the analysis focuses on total annual viewing hours for genres²⁴. The proportion of viewing of programme genres is also included, as is average weekly reach and audience share figures. The analysis provides viewing trends since 2004. Most figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency.

Audience impact

The majority of the audience impact data come from Ofcom's PSB Tracker survey. The data were collected throughout 2006, 2007 and 2008 daily across four months – January, April, July and October – ensuring that there is as little as possible bias on perceptions due to seasonality. Around 7,000 viewers were interviewed each year by telephone; interviews were carried out by GfK NOP.

The survey asked (self-defined) regular viewers of each PSB channel their opinion of the delivery of PSB purposes and characteristics²⁵. The statements that they were asked about correspond to the purposes and characteristics as set out in Figure 3. Regular viewers are the focus in order to minimise hearsay and perception. Self-definition as a regular viewer (rather than a definition using the number of hours viewed on a particular channel) is used because viewers' opinions on the channel can be driven by *regular* viewing of programmes regardless of how many or few hours this involves²⁶.

Our assessment has been based on the five main PSB channels, BBC Three, BBC Four, BBC News and BBC Parliament. It should be noted that BBC News 24/BBC News was included on the PSB Tracker from April 2007 and BBC Parliament was included from July 2008, and therefore data before this time do not focus on these channels. Since July 2008 the questionnaire prompted parents to also think about the BBC children's channels when responding about children's television in particular. More detail on methodology can be found in Annex 1.

The report also includes data from the BBC-GfK Pulse survey, an online, nationally-representative panel of over 19,000 viewers. Over 5,000 responses are collected each day. Panellists are presented with the previous day's schedules for all the five main PSB channels plus BBC Three, BBC Four, E4 and Sky1. Once they have selected the programmes they viewed they are asked a number of questions about them. Panellists only score programmes they have chosen to watch, and therefore they will generally be scoring programmes they enjoy. Scores are presented by responses, not respondents and therefore the Pulse data and PSB Tracker data are not directly comparable. The data collection and analysis Please see Annex 1 for more detail on methodology.

²⁴ This measure describes the total annual hours of viewing by an average individual of a given programme genre.

²⁵ Viewers are asked to rate each channel (and the channels taken together) out of 10 in relation to statements that reflect elements of the purposes and characteristics, and the top four scores (7-10) are used to calculate a positive response.

²⁶ Also, asking respondents to gauge how many hours per week they watch on a particular channel would involve a level of estimation and in turn could reflect their *perceived* relationship with the channel, rather than strict hours of viewing.

Figure 3: PSB purposes and characteristics and their alignment with PSB Tracker statements

PSB purposes and characteristics	PSB Tracker statements
Purpose 1: To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas	Its news programmes are trustworthy Its programmes help me understand what's going on in the world today Its news programmes for people in (nation) provide a wide range of good quality news about (nation) (asked in the devolved nations) ²⁷ Its Regional News programmes provide a wide range of good quality news about my area (asked in England)
Purpose 2: To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning	It shows interesting programmes about history, sciences or the arts As a result of watching its programmes I've become more interested in particular subjects
Purpose 3: To reflect and strengthen our cultural identity through original programming at UK, national and regional level, and by occasionally bringing audiences together for shared experiences	<i>UK cultural</i> It covers big national events well, like sports, music events or major news stories It shows high quality Soaps or Drama made in the UK Provides a wide range of high quality and UK-made programmes for children* <i>Nations and regions</i> Its entertainment and factual programmes show people from different parts of the UK It portrays my region well to the rest of the UK Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation
Purpose 4: To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere	Its programmes show different kinds of cultures in the UK** Its programmes offer a range of opinions on subjects and issues**
High quality – well funded and well produced	It shows well-made, high quality programmes
Original – new UK content rather than repeats or acquisitions	It shows enough new programmes, made in the UK
Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones	It shows programmes with new ideas and different approaches
Challenging – making viewers think	It shows programmes that make me stop and think
Engaging – remaining accessible and attractive to viewers	It shows programmes I want to watch Its programmes reflect the interests and concerns of people like me
Trust ²⁸	I trust this channel*

* Statements added to the PSB Tracker for 2007

**Statements changed within the PSB Tracker in 2008

²⁷ In previous PSB Annual Reports findings relating to nations and regions news were reported in sections relating to Purpose 3.

²⁸ This was included as a statement in the PSB Tracker in order to monitor the extent to which trust is assigned to the main PSB channels as the digital TV environment expands. The statement was also included partly as a result of the issues surrounding phone votes within programmes on the PSB channels and in order to understand opinions on the channels after the resolution of this.

Programme genre definitions

The output hours and viewing figures use different datasets, which have slightly different programme classifications. The main differences are shown in Figure 4 below, which also provides illustrative programmes for the various genres as classified by the output hours.

Figure 4: Comparison of selected programme genre classifications and illustrative programme titles

Genre	Illustrative programmes	Output hours	BARB viewing figures
National and International News	<ul style="list-style-type: none"> • <i>BBC News at Ten</i> (BBC One) • <i>News at Ten</i> (ITV1) 	<ul style="list-style-type: none"> • Excludes Regional News • GMTV output is divided between News, Current Affairs, Factual, and Children's 	<ul style="list-style-type: none"> • Includes <i>Newsnight</i> on BBC Two • GMTV output is divided between News and Other Factual (for features) • Does not include regional News
Current Affairs	<ul style="list-style-type: none"> • <i>Question Time</i> (BBC One) • <i>Newsnight</i> (BBC Two) • <i>Tonight with Trevor McDonald</i> (ITV1) • <i>Dispatches</i> (C4) • <i>The Wright Stuff</i> (Five) 	<ul style="list-style-type: none"> • Excludes consumer affairs (which is categorised under General Factual) 	<ul style="list-style-type: none"> • Includes political, economic, social, consumer affairs
Other Factual	<ul style="list-style-type: none"> • <i>Watchdog</i> (BBC One) • <i>Gardener's World</i> (BBC Two) • <i>60 Minute Makeover</i> (ITV1) • <i>A Place in the Sun</i> (C4) • <i>Hotel Inspector</i> (Five) 	<ul style="list-style-type: none"> • Includes consumer affairs, Factual Entertainment, leisure and hobbies, talk shows and factual magazine shows 	<ul style="list-style-type: none"> • Includes human interest, Factual Entertainment, hobbies and leisure
Specialist Factual	<ul style="list-style-type: none"> • <i>One Life</i> (BBC One) • <i>Horizon</i> (BBC Two) • <i>Born Survivor: Bear Grylls</i> (C4) • <i>Banged up Abroad</i> (Five) 	<ul style="list-style-type: none"> • Includes natural history, science and technology, history, other documentaries and special events 	<ul style="list-style-type: none"> • Includes natural history, science and medical, history, factual Drama
Education	<ul style="list-style-type: none"> • BBC Learning Zone • Channel 4 Schools 	<ul style="list-style-type: none"> • Includes Formal Education and Schools programmes 	<ul style="list-style-type: none"> • Includes schools' programmes
Entertainment	<ul style="list-style-type: none"> • <i>My Family</i> (BBC One) • <i>Never Mind the Buzzcocks</i> (BBC Two) • <i>Britain's Got Talent</i> (ITV1) • <i>8 out of 10 Cats</i> (C4) • <i>Cooking the Books</i> (Five) 	<ul style="list-style-type: none"> • Includes Comedy and sitcoms • Includes contemporary music 	<ul style="list-style-type: none"> • Includes contemporary music • Includes Comedy for overviews; although UK comedy is separated off for analysis of PSB purpose 3
Originated Drama	<ul style="list-style-type: none"> • <i>Waterloo Road</i> (BBC One) • <i>Torchwood</i> (BBC Two) • <i>Heartbeat</i> (ITV1) • <i>Shameless</i> (Channel 4) 	<ul style="list-style-type: none"> • Includes 'made for TV' films • Includes Factual Drama 	
Originated Soap	<ul style="list-style-type: none"> • <i>Coronation Street</i> (ITV1) • <i>EastEnders</i> (BBC One) 	<ul style="list-style-type: none"> • Excludes <i>The Bill</i> 	<ul style="list-style-type: none"> • Includes <i>The Bill</i>
Films		<ul style="list-style-type: none"> • Excludes 'made for TV' films 	<ul style="list-style-type: none"> • Includes 'made for TV' films

Section 1

Overview of the UK television market in 2008

Introduction

This section provides an overview of the UK television landscape, including key metrics relating to output, consumer behaviour and market developments.

Key themes

Digital TV take-up and digital switchover

- Digital TV penetration continued to edge forward and reached 88.8% by the end of 2008²⁹. Less than 1 in 3 (27.6%) of all television sets received analogue terrestrial television and Freeview (DTT) was on 43.1% of all television sets at the end of 2008.
- The UK's switch to digital-only terrestrial broadcasting is now gathering pace. Digital switchover was completed in the Scottish Borders region in November 2008. Switchover reached the West Country in April 2009 and Exeter became the first digital-only TV city in May 2009.
- The BBC and ITV launched Freesat, a digital satellite platform, which attracted 233,000 customers by the end of 2008. About three-quarters of these receivers and integrated digital televisions were capable of receiving HDTV.

Changing digital TV consumption patterns

- Just over a quarter (27%) of UK homes reported having digital video recorders (DVRs) in the first quarter of 2009.
- Among those with a DVR, BARB analysis indicates that 15% of all viewing of content on the five main PSBs in 2008 was time-shifted within seven days of broadcast. This increases to 19% among those between 16-34 years old. Note: BARB does not measure time-shifting outside seven days, so levels of time-shifting may be higher.
- Video on demand is becoming an increasingly-used tool for TV viewing, with, for example, more than half of Virgin Media's 3.5 million cable TV homes regularly using VoD.
- Broadcasters are placing growing emphasis on distributing content on the internet and are developing technologies to bring internet video to the television set.
- Consumers are demonstrating a willingness to watch long-form programming on personal computers (32% of consumers said they had watched online video clips or 'webcasts', while 19% had watched TV programmes on the internet), facilitated by a move towards higher broadband speeds and greater availability of content online.

²⁹ Early 2009 data is also available and shows that digital TV penetration reached 89.2% in quarter 1 2009. For more details, see www.ofcom.org.uk/research/tv/reports/dtv/dtu_2009_01/

- By the end of 2008, 7% of UK homes claimed to have a HDTV subscription, up from 4% in the first quarter of 2008. One-third of consumers said they owned a HD-ready TV set in the fourth quarter of 2008. The amount of high-definition content available has increased; 33 HD channels were available at the end of 2008 across various TV platforms.

Broadcasters feel the impact of the economic downturn

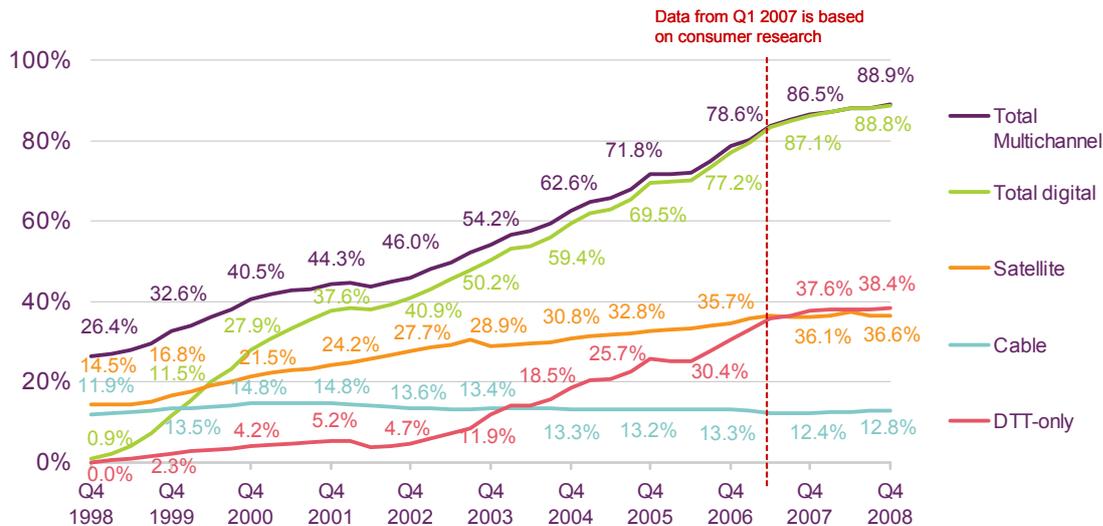
- A number of broadcasters have responded to the economic downturn by announcing job cuts, reduced budgets and cutbacks in some programming genres. Many commercial broadcasters have seen their advertising revenues fall in recent months.

Digital TV penetration edges higher

Digital television penetration reached 88.8% at the end of 2008, up from 87.1% a year earlier³⁰. Multichannel television penetration reached 88.9% during the period.

A small proportion of homes receive analogue multichannel television through cable, however Virgin Media plans to turn off analogue signals in 2009.

Figure 1.1: Digital TV progress: 1998-2008



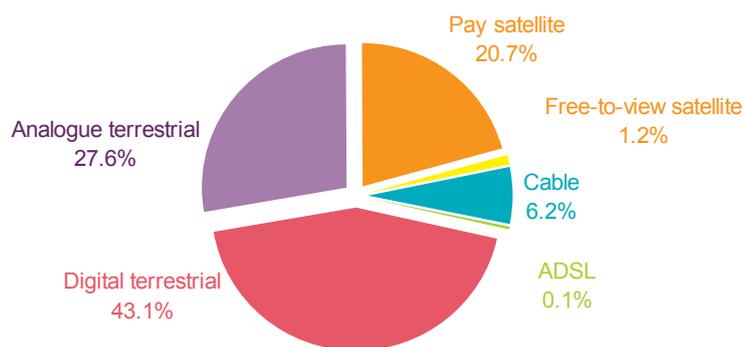
Source: Ofcom, GfK, Sky, Virgin Media

Note: Digital terrestrial relates to DTT-only homes

Less than a third (27.6%) of all television sets received analogue terrestrial at the end of 2008, down from 34.9% at the end of 2007. Freeview was on 43.1% of all television sets at the end of last year, up from 36.9% a year earlier.

³⁰ http://www.ofcom.org.uk/research/tv/reports/dtv/dtu_2008_04/q42008.pdf. Early 2009 data is also available and shows that digital TV penetration reached 89.2% in quarter 1 2009. For more details, see www.ofcom.org.uk/research/tv/reports/dtv/dtu_2009_01/

Figure 1.2: Market share of platforms – all TV sets, Q4 2008



Total TV homes = 25.6 million
% take-up of TV homes

Source: Ofcom, GfK

In May 2008, the BBC and ITV launched Freesat, a subscription-free digital satellite platform which attracted 233,000 customers within eight months of launch, according to Freesat figures. About three-quarters of receivers and integrated digital televisions (IDTV) sold were capable of receiving HDTV.

The UK's digital switchover gets under way

The UK plans to complete analogue switch-off by the end of 2012. By the end of 2008, 77,000 homes in the Scottish Borders region (Selkirk transmitter) had seen their analogue terrestrial TV signals switched off as part of digital switchover³¹. Switchover in West Country started in April 2009, with the Beacon Hill transmitter, which covers 147,000 homes, making the transition to digital. Exeter became the first 'digital city', making the switch in May 2009. The first major region to turn off analogue TV will be Granada, covering nearly three million homes in Manchester, from November 2009.

³¹ http://www.digitaluk.co.uk/__data/assets/pdf_file/0019/23275/20-11-08_switchover_completed.pdf

Figure 1.3: Digital switchover regions



Source: Digital UK

Virgin Media plans to turn off all analogue cable television services in 2009, releasing a third of its network capacity. This could be used for services such as next-generation broadband service and HDTV, according to the company. Virgin Media had 152,000 analogue TV customers at the end of 2008.

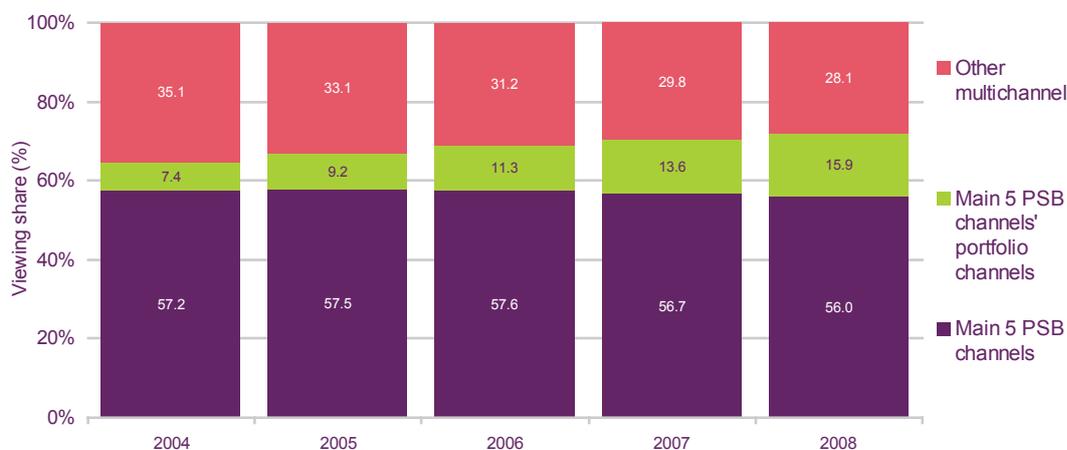
Non-PSB owned channels' decreasing viewing share

As shown in more detail in section 2, while the five main PSB channels have lost viewing share over recent years, their multichannel portfolio channels³² have increased their share in multichannel homes since 2004, with the launch of new channels from ITV, Channel 4 and

³² The BBC's portfolio channels are PSB channels, but the ITV, Channel 4 and Five portfolio channels are not PSB channels.

Five. Over this period other non-PSB owned channels have also lost viewing share, as competition intensifies.

Figure 1.6: Share of TV viewing, multichannel homes: 2004 - 2008 (%)

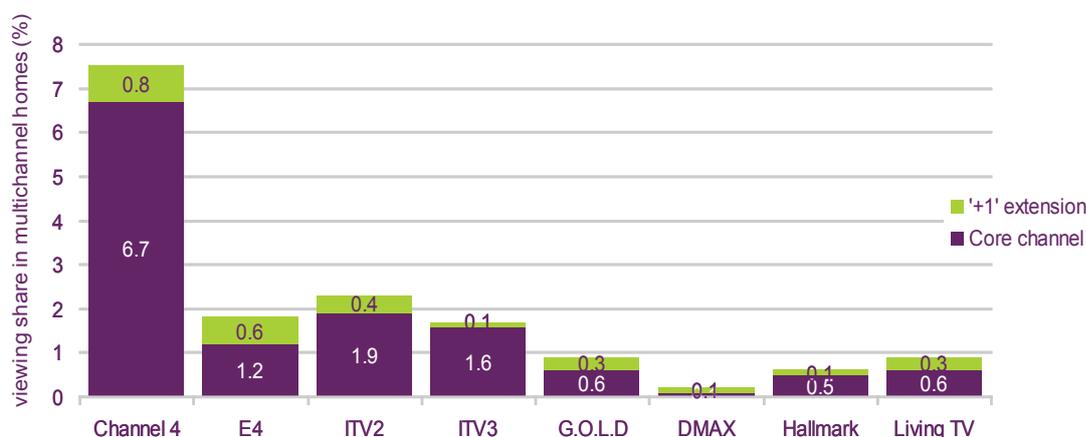


Source: BARB, all day, multichannel homes

Perhaps in response to this increased competition, some major multichannel operators have repositioned or renamed their channels. Following the rebrand of UKTV G2 to Dave in 2007, UKTV rebranded many of its channels, for example including Really, Blighty, Watch and Eden over the course of 2008 and 2009. Paramount Comedy changed its name to Comedy Central in April 2008. A number of channels also closed in the last year, including Nuts TV, Real Estate TV and Virgin Media TV's Trouble channel, which was replaced by a Living TV time-shift channel.

Multichannel extensions and '+1' channels are enabling consumers to time-shift more of their viewing. Channels including ITV4, Sky Arts, Discovery's DMAX and Viacom's BET launched time-shifted versions or extensions in recent months. Many channels have offered time-shifts extensions for some time, and Figure 1.7 shows that these can contribute as much as half the viewing of the core channel.

Figure 1.7: Viewing shares, selected channels and their +1 time-shifts, 2008



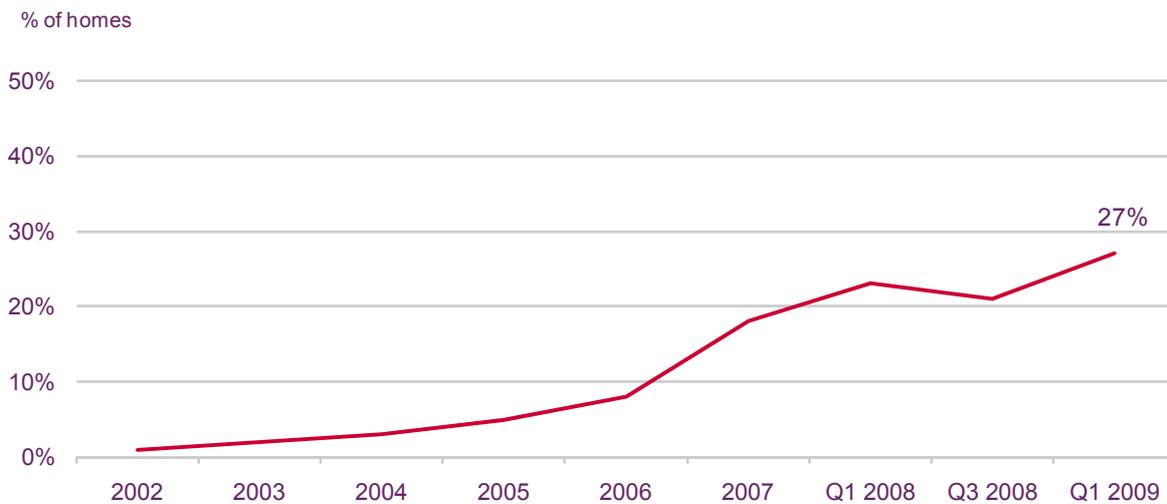
Source: BARB, all day, multichannel homes

DVR penetration reaches 27% of homes

Alongside the growing availability of '+1' channels, penetration of digital video recorders (DVR) is also increasing. A DVR is a digital TV set-top box which includes a hard disc drive, allowing users to time-shift their viewing through recording, pausing and rewinding live TV, for example Sky+.

Over a quarter of the UK population (27%) reported having a DVR in the first quarter of 2009, up by 4 percentage points from the first quarter in 2008, according to Ofcom consumer research³³.

Figure 1.8: DVR penetration in all homes



Source: Ofcom Research (Technology Tracker)

In addition to DVRs, Sky also has *Sky Anytime*, a 'push' video-on-demand service available on Sky+ set-top boxes, which is regularly used by 1 million Sky homes, according to Sky. Push VoD is where programmes are downloaded to the hard drive of the set-top box and accessed by viewers to offer 'virtual' VoD. BSkyB reported in February that in these homes, programmes watched on *Anytime* represented 2.3% of all viewing, a higher share than commercial channels Five and ITV2. Top Up TV, the pay-DTT operator, offers a 'push' VoD service to customers who subscribe to its '*TV Favourites*' package, which gives access up to 700 shows per month. Programmes are stored on the hard drive of the set-top box.

In homes with DVRs, viewers' likelihood to time-shift their viewing varies by genre. According to Ofcom research, 62% of consumers with DVRs said they were most likely to record films, while 53% were most likely to record drama. Just over a third (34%) said they were most likely to record live sport while just 7% said they were most likely to record news programming to watch later³⁴.

BARB figures show that across 2008, time-shifted viewing accounted for approximately 15% of all viewing of the five main PSB channels among all individuals with a digital video recorder (see figure 1.9). Overall, a greater proportion of viewing is time-shifted during peak

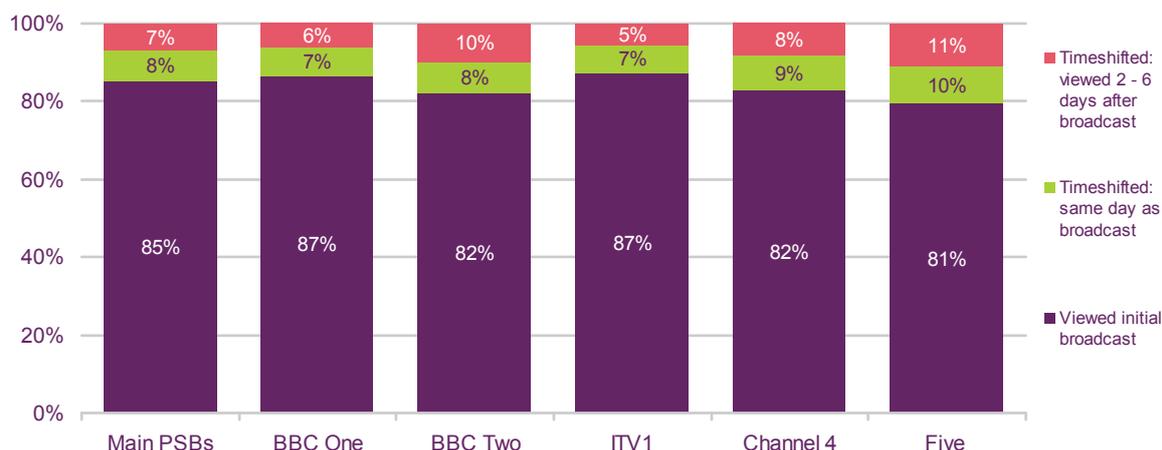
³³ Source: Saville Rossiter-Base, Technology Tracker Q3 2008 (July/Aug)

³⁴ Source: Saville Rossiter-Base, Technology Tracker Q3 2008 (July/Aug)

time (18%) compared to the all-day average. Over half (52%) of time-shifted viewing of the five main PSB channels took place on the same day as the original broadcast.

Note: Time-shifted viewing is defined as viewing of programmes recorded and subsequently played back within seven days, as well as viewing after pausing or rewinding live TV. Viewing outside the seven day window is not accounted for, so the proportion of time-shifted viewing of the main PSB channels could be higher than this.

Figure 1.9: Proportion of live vs. time-shifted viewing, by channel: 2008



Source: BARB 2008, all individuals with DVRs

BARB data also show that the 16-34 age group time-shifts a higher proportion of their viewing on the five main PSB channels than do other age groups. On average, 19% of 16-34 viewing was time-shifted, compared to 15% of 35-54 viewing, 11% of adults aged 55+ and 16% of children aged 4-15. In terms of different socio-economic grades, C2 individuals appear to watch a slightly higher proportion of time-shifted viewing compared to DE individuals (C2 17%, DE 14%) whilst AB and C1 individuals tend to time-shift a more similar proportion of their viewing on the five main PSB channels (AB 15%, C1 16%).

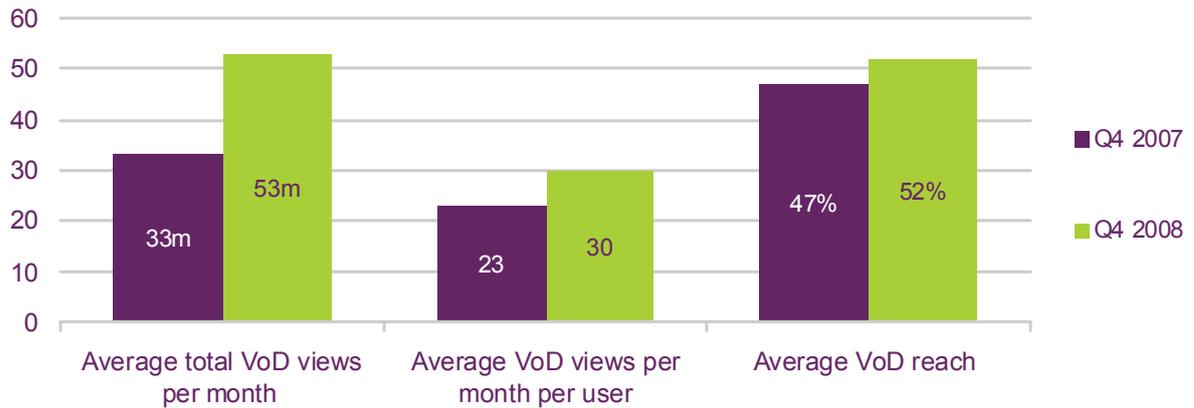
The BARB figures suggest that Sky+ owners time-shift a greater proportion of their viewing on the five main PSB channels (19%) than Virgin V+ users (11%), or Freeview users (9%). This could be due to a number of factors: that Sky+ has existed for longer than other DVRs and therefore Sky+ owners may be more sophisticated users, that they have more content at their disposal, or socio-demographic factors or attitude.

VoD use increases

All major broadcasters, including the BBC, ITV, Channel 4, Five and Sky, have distribution deals to ensure that their content is offered on demand via a range of platforms.

Increasing numbers of consumers are using video-on-demand (VoD) services through their television to take further control of their viewing. For example, Virgin Media's VoD service, which is available in nearly 3.5 million homes, registered 516 million views in 2008, a 60% increase on 2007. In December, the company registered 56 million VoD views. More than half of Virgin Media's digital TV homes regularly used VoD in 2008, according to company data.

Figure 1.10: Virgin Media average VoD data, Q4 2007 – Q4 2008



Source: Virgin Media

Virgin Media launched a television version of the BBC's iPlayer catch-up service in May 2008. Between May and December, the iPlayer accounted for 95 million VoD views on Virgin Media's television platform.

Channel 4 registered more than 80 million views of its programmes on the television VoD platforms of Virgin Media, BT Vision and Tiscali TV in 2008.

BT Vision, the 'hybrid' platform that offers Freeview (DTT³⁵) channels and on-demand content via IPTV³⁶, had 398,000 subscribers in February, up from 120,000 at the end of 2007. Tiscali TV, the former HomeChoice IPTV platform, had around 60,000 subscribers at the end of 2008, according to GfK ConsumerScope research.

Consumers are using online video

Beyond the television, UK consumers are showing an increasing appetite to watch audiovisual content on the internet. Ofcom research, published in January 2009, found that UK consumers receive actual average broadband speeds of 3.6Mbit/s³⁷, which enables high-quality streaming of programming online.

According to Ofcom research from September 2008, 32% of consumers said they had watched online video clips or 'webcasts', while 19% had watched TV programmes on the internet³⁸.

There are a range of online services available, for example, BBC iPlayer, ITV Player, 4OD, and Demand Five. The BBC's iPlayer online video service reported 277 million requests to stream and download in 2008, of which 41 million were made in December³⁹.

³⁵ Digital terrestrial television (or "DTT") refers to the use of digital technology to replace the previous generation of analogue TV broadcasting, enabling more channels to be provided using spectrum more efficiently.

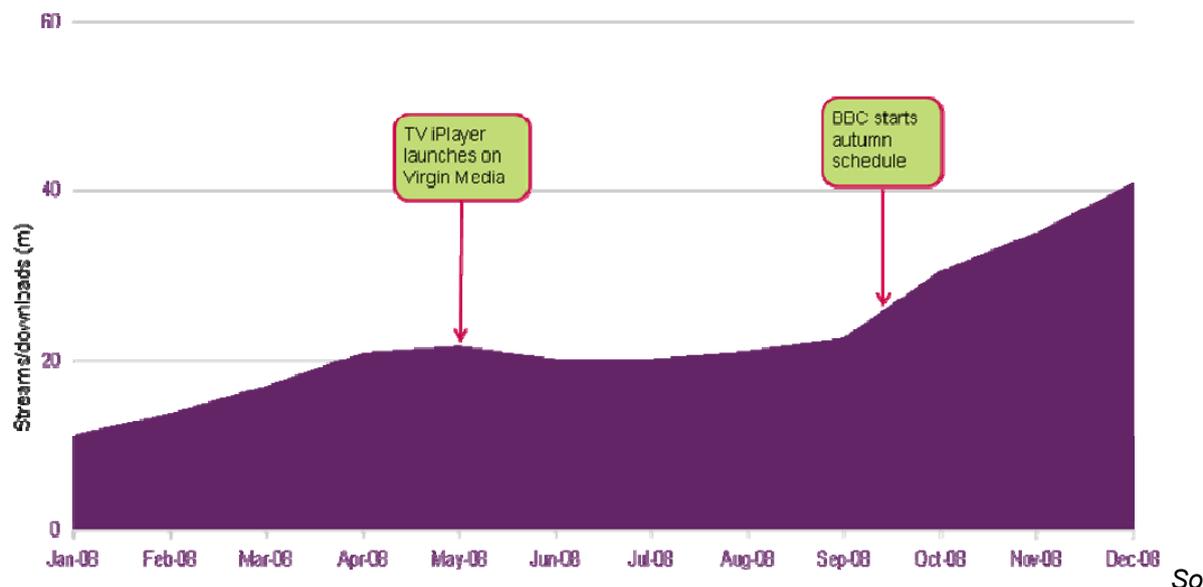
³⁶ IPTV or Internet Protocol Television is television and/or video signals that are delivered to subscribers or viewers using Internet Protocol (IP), the technology that is also used to access the Internet. Typically used in the context of streamed linear and on demand content, but also sometimes for downloaded video clips.

³⁷ http://www.ofcom.org.uk/media/news/2009/01/nr_20090108

³⁸ Source: Saville Rossiter-Base, Technology Tracker Q3 2008 (July/Aug)

Figure 1.11: BBC iPlayer online usage statistics in 2008

BBC iPlayer monthly online streams/download requests, 2008



Source: BBC

The BBC introduced a series of new developments for iPlayer throughout 2008, including a version for children and downloading for Mac and Linux users. High definition content was made available in April 2009. iPlayer versions are also available for Apple's iPhone, the Nokia N96 mobile phone and the Nintendo Wii games console. ITV's online catch-up television service, previously included as part of *itv.com*, was rebranded as *ITV Player* in December 2008. ITV placed a greater emphasis on video content for its website last year and reported 15.7 million video views in November 2008, an increase of 598% on November 2007⁴⁰. Five rebranded its online-video service as *Demand Five* in the summer of 2008. Channel 4 announced plans in February 2009 to launch a new catch-up TV player, to be closely integrated with the broadcaster's website.

Sky offers a range of its programming, and content from third parties, on its *Sky Player* service. Sky also launched *Sky Player TV*, an online-only subscription TV service. The service is aimed at consumers who cannot have, or do not want, a satellite dish. Customers with a Sky multiroom or a Sky Broadband Max subscription can also access some of BSkyB's live TV channels online for no extra charge.

Project Kangaroo, the online video joint venture proposed by BBC Worldwide, ITV and Channel 4, was rejected by the Competition Commission in February 2009. The BBC, ITV and BT revealed proposals for Project Canvas, a joint venture for an 'open standard' to create internet-connected Freeview and Freesat set-top boxes. The project, which is subject to BBC Trust approval, would use open technical standards to deliver a range of on-demand content to televisions.

A number of consumer electronics manufacturers are introducing television sets incorporating broadband connections. Such devices enable internet content to be displayed on the television.

³⁹ http://www.bbc.co.uk/pressoffice/pressreleases/stories/2009/01_january/06/iplayer.shtml

⁴⁰ <http://www.itvplc.com/media/newsrelease/?page=2&id=3147>

Yahoo! and Intel announced plans to bring a selection of internet video and applications to televisions through a venture called *Widgets*. They have signed deals with manufacturers including Samsung, LG and Toshiba, who will integrate the Widget chipset into broadband-enabled televisions.

IP Vision, a start-up company backed by French manufacturer Netgem, launched Fetch TV, a set-top box that offers Freeview channels and VoD. The device delivers on-demand programmes and films via the internet to the television by downloading programmes to the hard drive of the box.

One-third of UK consumers have HD-ready TVs

When taking account of Sky+ HD, V+, Freesat, and BT Vision, nearly 2.2 million homes had set-top boxes or integrated-digital televisions capable of receiving HD programming via linear channels or on-demand at the end of the first quarter of 2009. Not all homes with HD-compatible set-top boxes necessarily own a HD-ready television set capable of displaying HD signals.

- Sky had 1,022,000 subscribers to its Sky+ HD service at the end of the first quarter of 2009. Sky offered 32 HD channels covering key genres such as Sport, Films and Entertainment.
- Freesat launched in May 2008, offering HD content from the BBC and ITV.
- Virgin Media offers one linear HD channel, BBC HD, and a selection of on-demand HD content.
- BT Vision offers some HD films on demand, which are downloaded to boxes.
- Freeview is expected to offer three HD channels – from the BBC, ITV and Channel 4/S4C - at the end of 2009 or early 2010 on a regional basis, facilitated by the introduction of new compression and transmission technologies⁴¹.

⁴¹ <http://www.ofcom.org.uk/media/features/hdfree>

Figure 1.12: Comparison of high-definition TV services

Platform	Provider	Launch date	HD content available	Number of homes with HD boxes or TV sets as of end Q1 2009
Satellite	BSkyB	April 2006	32 linear channels covering key genres such as Films and Sport. Third-party channels include the BBC, Channel 4, Discovery, MTV and Eurosport	1,022,000
Satellite	Freesat	May 2008	BBC HD channel and ITV content accessed via red button	225,000
Cable	Virgin Media	December 2005	BBC HD is the only linear HD channel on offer as of June 2009. 100 hours of HD on-demand programmes plus 30 HD on-demand movies are available (new channels planned)	611,900
IPTV	BT Vision	September 2008	Films from Universal, which are downloaded to BT Vision box, are available in HD.	423,000
DTT	Freeview	Planned for late 2009/early 2010 in Granada	Channels available at launch should include BBC, ITV and Channel 4. Five has since been awarded a fourth licence, subject to the channel meeting certain criteria	-

Source: Ofcom, company data

Note: DVB-T2 is a next-generation transmission technology for DTT which could offer bandwidth efficiencies of up to 50%⁴². MPEG-4 is an advanced compression technology.

By the end of 2008, 7% of UK homes claimed to have a HDTV subscription, up from 4% in the first quarter of 2008, according to Ofcom research. 33% of consumers said they owned a HD-ready TV set in the fourth quarter of 2008.

Broadcasters feel the impact of the economic downturn

A number of broadcasters have been affected by the recession and many have announced job cuts, reduced budgets and cutbacks in some programming genres.

Television advertising, the primary source of revenue, has fallen in recent months and is expected to drop further. Television advertising revenues stood at £3.820bn in 2008, down 5.1% on 2007, according to data from the Advertising Association. Television advertising revenues are expected to fall further to £3.542bn in 2009, lower than the value of the market in 2003.

⁴² http://www.dvb.org/news_events/dvbscene_magazine/DVB-SCENE27.pdf

Section 2

Overview of PSB TV: output and viewing

Introduction

This section provides an introduction to the viewing patterns of people in the UK at a general level. It looks at the share and reach of channels as well as levels of output and viewing of different genres on the PSB channels.

This section aims to give a broad overview, while sections 4 to 8 examine the output data, viewing figures and audience impact in relation to each purpose and characteristic in more detail.

The focus is upon the five main PSB channels rather than a wider group including the BBC digital channels, in order that, for example, children's output on the digital channels does not distort the proportions of output being described. Later sections provide details of output and viewing, including BBC Three, BBC Four, BBC News 24/BBC News and S4C. There is also a separate section examining Children's programming.

Key themes

PSB output and spend

- The Second Review of PSB identified that UK-originated programming is a priority, but that the PSB broadcasters are under increasing pressure in the digital environment and the current economic climate.
- Spend⁴³ by the five main PSB channels on first-run originated output has decreased from £3,064 million in 2004 to £2,697 million in 2007 and £2,620 million in 2008. Spend on programmes broadcast in peak time declined less than programmes shown at other times of the day, reducing by 6% since 2004.
- The total volume of **first-run originated** programmes on the five main channels in 2008 was 33,177 hours a year; a slight decrease (964 hours or 3%) on levels in 2007 and a similar decrease on levels 5 years ago (also a 3% reduction).
- Overall spend on all network programming⁴⁴ has decreased over the last four years, by an average of 2.6% a year, reducing from a total of £3,110 million in 2004 to £2,799m in 2008. Within this figure, spend on repeats and acquired programmes has increased.
- Total expenditure on network programmes⁴⁵ broadcast has declined on most of the five main PSB networks since 2004, with the exception of Five where spend increased by just under 1%. Spend on BBC One and BBC Two combined decreased by 13%, whilst spend across the commercial channels (ITV1, Channel 4 and Five) fell by 8%.

⁴³ Figures are expressed in 2008 prices.

⁴⁴ Note: this excludes nations/regions programming

⁴⁵ Note: this excludes nations/regions programming

- Investment in nations and regions output by ITV1/STV/UTV has fallen by £41m or 25% from £162m in 2005, to £121m in 2008. Spend on BBC nations and regions output has also fallen over this period, by £34m or 15%, from £220m in 2005 to £186m in 2008.
- The balance of peak-time output by different programme genres on the five main PSB channels, taken together, has remained relatively stable over the past five years. Small shifts include reductions in the proportion of Films, Drama (including Soaps) and Entertainment (including Comedy). Factual programmes increased over the same period, from 27% of peak-time output to 30% by 2008.
- However, if we look at the full 24-hour daily schedule, over the last five years, for the five PSB channels taken together, we see that there has been a considerable increase in Factual programmes; from 16% of the total output in 2004 to 24% by 2008. In particular, there has been an increase in the proportion of the schedule accounted for by the subgenre of Other Factual programming, from 2007 to 2008 (from 8% to 11%).

Overall viewing

Hours of viewing

- The average hours of daily viewing of the five main PSB channels was 2.7 hours in 2004 and has declined across all viewers, levelling out at 2.3 hours a day both in 2007 and 2008.
- Viewing of the five main PSB channels varies quite considerably across the different demographic groups, with those aged 65 or older watching over four hours a day and children (4 to 15 years old) viewing for less than one hour a day in 2008. The greatest reduction in viewing of the five main PSB channels over the last five years was among children and adults aged 44 and under.
- Looking more broadly at the hours of viewing of *all* TV (i.e. on *any* television channel) since 2004, there has not been an equivalent decrease in total for the average viewer. However, there has been a decrease in the average hours of viewing television among children and 16-to-34 year olds. In contrast, from 2007 to 2008, there were small increases in the viewing of any television channel by all age groups except those aged 16 to 24.

Main five PSB channels

- The combined share of the five main PSB channels declined from 75% in 2004 to 61% in 2008. In peak time it declined by 12 percentage points from 80% in 2004 to 68% in 2008.
- ITV1 had the largest drop in peak-time share from 29% in 2004 to 23% in 2008 and BBC One also had a drop of 3% over this time. Historically, ITV1 has achieved a greater peak-time share of viewing than BBC One; however in 2008 BBC One's peak-time share was 24% while ITV1's was 23%.

PSB channels' portfolios and broadcaster groups

- Alongside the decreases in viewing of the five main PSB channels, there has been a steady increase in average weekly reach to all of the PSB portfolio channels combined (both PSB and commercial) since 2004; from 53% in 2004 to 69% in 2008.

- The main PSB broadcasters are the only broadcaster groups that have seen their total share increase in multichannel homes from 2004 to 2008.

Viewing of different types of programmes

- The weekly reach of all genres combined on the main five PSB channels has declined from 90% in 2004 to 87% in 2008. Most genres have seen a decline in reach over this period. The most marked has been to Children's genre programming among the overall population, where reach fell from 21.9% in 2004 to 12.5% in 2008. However, some genres have seen an increase in reach: Sport, Arts⁴⁶ and Current Affairs.
- In 2008, over a fifth of viewing of BBC One over the entire day was of UK/National News and Weather and 11% of viewing on BBC One was of Current Affairs. For BBC Two, a third of viewing was of Other Factual, 15% Sport, 9% Specialist Factual and 4% Children's programming.
- Just over a fifth of total viewing of ITV1 in 2008, was Soaps and Entertainment programming. A third of viewing of Channel 4 was Other Factual and Entertainment programming, with Films making up 13% and Specialist Factual making up 3% of viewing. For Five 28% of viewing was of Films, and over a fifth was of Drama.
- Comparing viewing of the five main PSB channels with viewing of the PSB portfolio channels combined (both PSB and commercial), shows that, on the former, a larger proportion of viewing is dedicated to News, Current Affairs, Specialist Factual, Other Factual, Soaps and Sport. On the portfolio channels as a group, a greater proportion of viewing is dedicated to Drama, Films (double the proportion of viewing spent on the main PSB channels) and Children's programming.

Changing consumption patterns and viewer impact

- Research carried out by Essential Research in 2008 looked at video on demand in its broadest sense (i.e. TV services, online viewing and use of DVRs). It found that the majority of VoD use so far had been driven by convenience and catching-up, and that most participants expected to watch 'better' TV rather than more TV as VoD services evolve.
- Pulse⁴⁷ data show that of all viewed programmes on the main 5 PSB channels 'a special effort to view' was claimed in 44% of viewers' responses to these in 2004, and this increased to 49% by 2008.
- Ofcom research also found that users of non-linear TV claim that it enhances their general viewing experience; 78% of users of TV on-demand services agreed they 'watch more programmes *that I enjoy because of on-demand services through the TV*', 80% of DVR users agreed they 'watch more programmes *that I enjoy because of my DVR*' and 65% of users of TV online agreed that they 'watch more programmes *that I enjoy because of having access to TV content online*'.

⁴⁶ Note: the total hours of Arts viewing has decreased. Although people are watching fewer total hours of this genre, more people are watching.

⁴⁷ The Pulse survey is a BBC-GfK online, nationally-representative panel of over 19,000 viewers that collects responses on programmes that were viewed on the previous day.

- This research also found that among those with access to digital channels, two-thirds (68%) say they '*watch more programmes that I enjoy because of having digital channels*' and among all adults two-fifths (44%) agree that '*the quality of programmes on the BBC channels, ITV1, Channel 4 and Five has generally increased in the past year*'.
- When asked if they '*appreciate [the main PSB] channels and their programmes more than I did in the past*', 25% of adults agreed. Those with multichannel TV were more likely to agree with this statement than those with analogue-only TV.

PSB output hours and spend

This section considers the number of hours broadcast by the PSB channels and the relative proportions of different types, or genres, of programmes shown. It looks first at how overall proportions and amounts of output have changed over time for the PSBs taken together, before examining how the changes relate to individual channels. It is important to note that the majority of the data in this chapter relate only to network programmes. Nations/regions output is considered separately in the sections about purpose 1 and the individual nations and English regions. More detail on the output related to the other PSB purposes and characteristics is covered later in this report.

Originations

A key element of the PSB landscape, and one which distinguishes PSB broadcasters from purely commercial channels, is the high level of originated programming that these broadcasters show. Originated programmes are those commissioned from independent companies as well as output made within the broadcasters' own production divisions. The Second Review of PSB identified that UK-originated programming is a priority for audiences.

Figure 2.1 illustrates the distribution of programme spend on first run originated output across times of the day, showing that expenditure has reduced consistently year on year in all day parts⁴⁸. Overall spend on first-run originated output has decreased from £3,064 million in 2004 to £2,697 million in 2007 and £2,620 million in 2008.

Spend on programmes broadcast in peak time was more buoyant than programmes shown at other times of the day, reducing by 6% since 2004, compared with a 13% reduction in the day time and 39% late night. The chart also shows the fall in the cost of regional programmes from a total of £410m in 2004 to £306m in 2008, a drop of 25% over the period.

⁴⁸ Figures are expressed in 2008 prices.

Figure 2.1: Spend on first-run originated output on the five main channels 2004-2008



Source: Ofcom/Broadcaster returns. Note: figures are expressed in 2008 prices. Figures include GMTV.

Figure 2.2 shows the volume of first-run originated programmes on the five main channels over the last five years (including nations/regions programming). After reductions in 2005, output increased in 2006 and 2007 but fell back a little in 2008, resulting in 33,177 hours a year or 638 hours a week.

In peak time, network originations have remained at similar levels, increasing a little in 2008 from 2007, to 5,597 hours – over 107 hours a week. Outside peak time the volume was lower in 2008 than in the previous two years, largely as a result of the cancellation of the late-night dial-in quiz programmes that were shown in high volumes on ITV1 in those years.

Non-network originations are programmes produced and broadcast in the nations and English regions on BBC One, Two and ITV1, and consist mainly of local News programmes. After reductions in 2005, this non-network output has remained relatively stable over the last three years, taking the BBC and ITV1 together.

Output for individual broadcasters, and viewer perceptions of the amount of first-run UK originated programming, are analysed in more depth in section 8.

Figure 2.2: Output of first-run originated programmes on the main five PSB channels, 2004-2008



Source: Broadcaster returns

Overall spend on network programming

Figure 2.3 shows overall programming spend, including spend on repeats and acquired programming *on network programming only*⁴⁹. This shows that overall spend on all network programming has decreased over the last four years, by an average of 2.6% a year, reducing from a total of £3,110 million in 2004 to £2,799m in 2008. Within this figure, while spend on repeats and acquired programmes has increased, the amount spent on first run originations has fallen by £339m since 2004 from £2,653m to £2,314m. This reflects a reduction in the number of hours of first run originations broadcast.

⁴⁹ This excludes nations/regions programming.

Figure 2.3: Five main channels programme spend; by type of programming, 2004-2008



Source: Ofcom/Broadcaster returns. Note: figures are expressed in 2008 prices. Figures include GMTV.

Figure 2.4 identifies that since 2004, total expenditure on all network programmes⁵⁰ broadcast has declined on most of the five main PSB networks, with the exception of Five where spend increased by an average of just under 1%. The rate of reduction was greatest on the BBC with a 4% fall on BBC Two and 3% on BBC One on average over the period. On ITV1 (including GMTV) the percentage reduction averaged 3% while on Channel 4 the figure was a little lower at 2%.

Figure 2.4: Five main channels programme spend; by broadcaster, 2004-2008

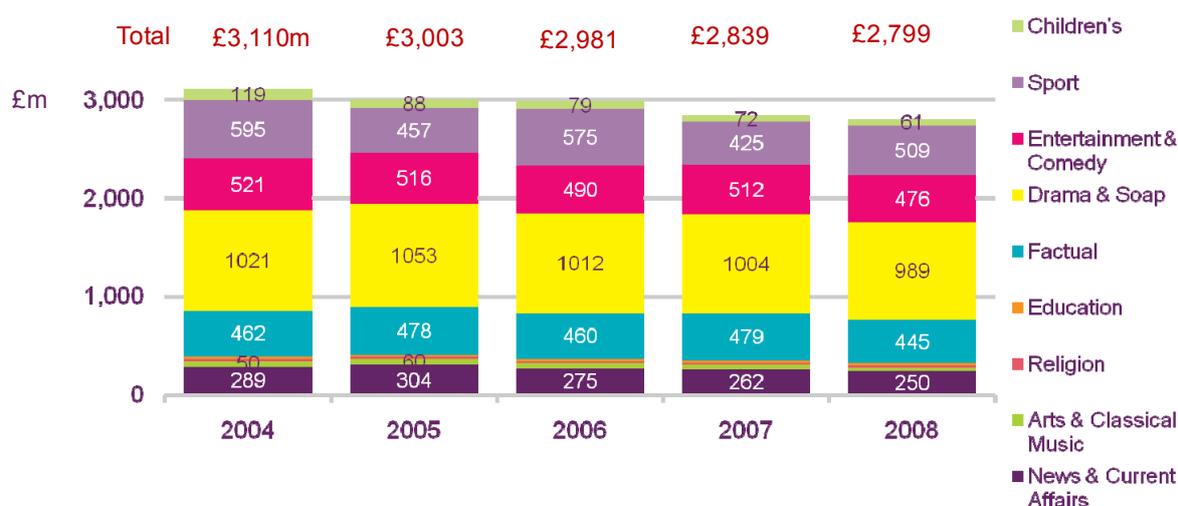


Source: Ofcom/Broadcaster returns. Note: figures are expressed in 2008 prices. Figures include GMTV.

⁵⁰ This excludes nations/regions programming.

Figure 2.5 shows the total value of expenditure on network programmes⁵¹ by the five main PSB channels on programmes by genre since 2004. As previously explained, overall programme spend has decreased and this is reflected within all programme genres where spend has fallen, to a greater or lesser extent. Expenditure on Children’s programmes has shown the steepest fall, amounting to a cut of almost half (48%) from £119m in 2004 to £61m in 2008. Spend on Religion and Arts programmes has reduced by 34% and 33% respectively while Education fell by 28%. Budgets for News and Current Affairs programmes showed a fall of £39m from £289m in 2004 to £250m in 2008 or 14%. Spend on other programme genres has fallen less steeply: Entertainment and Comedy output fell by 9%; Factual by 4% and Drama (including Soaps) by 3%.

Figure 2.5: Five main channels programme spend; by genre, 2004-2008



Source: Ofcom/Broadcaster returns. Note: figures are expressed in 2008 prices. Figures include GMTV. Data labels shown for spend of £50m or more.

Spend on nations and regions programming

Figure 2.6 shows spend on nations and regions output by the BBC and ITV1/STV/UTV since 2004. Although the figures for 2004 included here, these are based on cost per hour averages, while those for 2005 - 2008 are actual spend figures. Comparisons between 2004 and later years should therefore be exercised with caution.

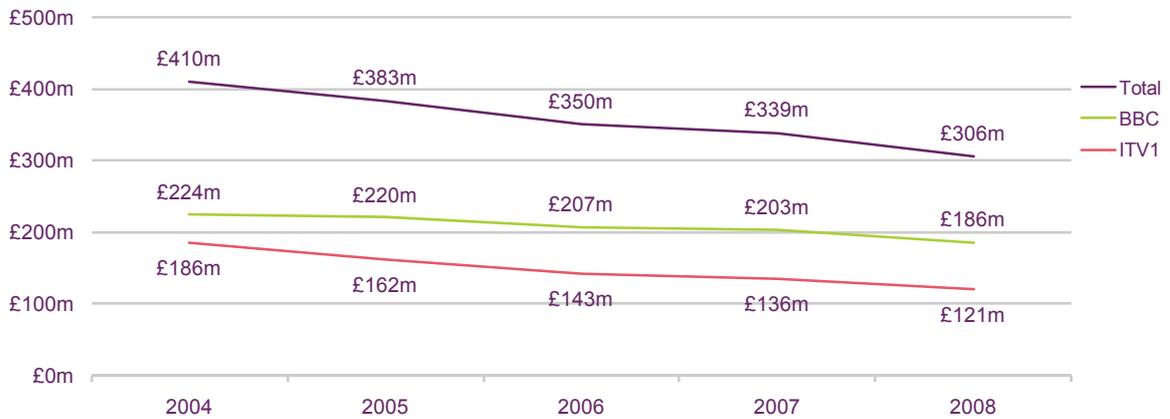
Investment in nations and regions output by ITV1/STV/UTV has fallen by £41m or 25% from £162m in 2005, to £121m in 2008. Spend on BBC nations and regions output has also fallen over this period, by £34m or 15%, from £220m in 2005 to £186m in 2008.

⁵¹ This excludes nations/regions programming.

Figure 2.6: Investment in nations and regions programming, 2004-2008

Total investment in nations and regions output by the BBC, ITV1/STV/UTV

Investment (£m, 2008 prices)



Source: Broadcasters. All figures expressed in 2008 prices.

Note: The BBC changed the way it calculated its spend figures from 2005 onwards. The figures for 2004 are based on cost per hour averages, while those for 2005 - 2008 are actual spend figures. Comparisons between 2004 and later years should therefore be exercised with caution.

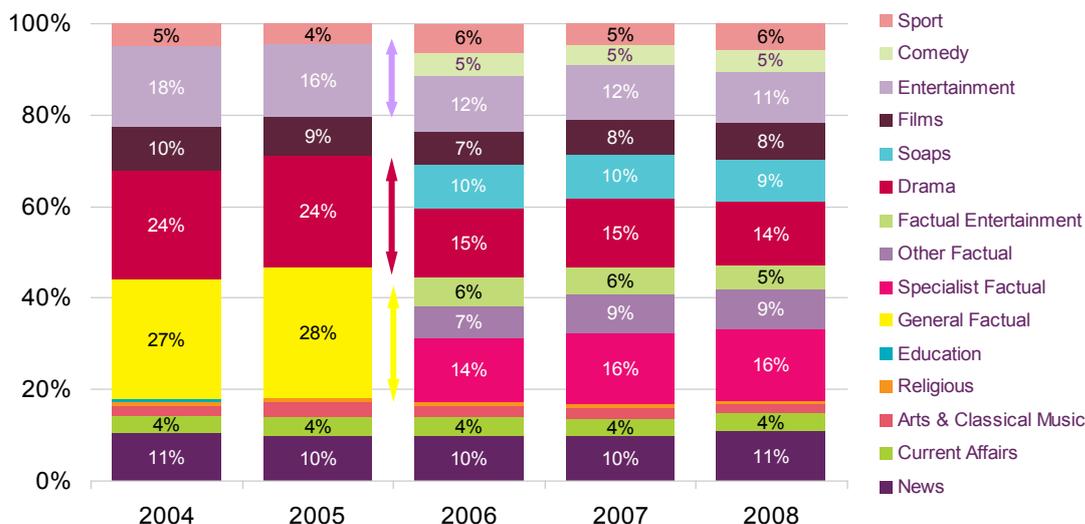
Profile of output: over time and by PSB channel

The balance of peak-time⁵² output in different programme genres on the five main channels taken together has remained relatively stable over the last five years, as shown in Figure 2.7. Small shifts include a reduction in the proportion of Films – down from 10% of peak-time output in 2004 to 8% in 2008, small decreases in Drama (including Soaps) from 24% in 2004 to 23% in 2008 and Entertainment (including Comedy) from 18% to 16%. Factual programmes increased over the same period from 27% of peak-time output to 30% by 2008.

⁵² Peak time is defined as 6pm to 10.30 pm.

Figure 2.7: Peak-time output on the five main PSB channels, 2004-2008

Proportion of output (%)



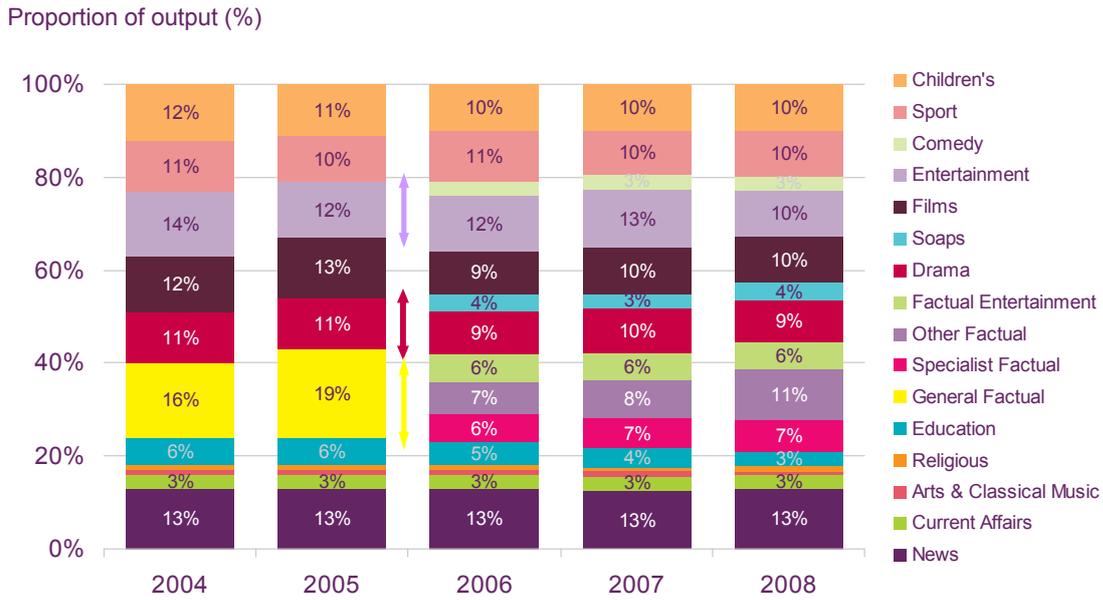
Source: Broadcaster returns

NB Arrows indicate where old genres (Entertainment, Drama incl. Soaps, and General Factual) map to new genres

The equivalent picture for the full 24 hours is shown in Figure 2.8. The main change over the last five years, for the five PSB channels taken together, was an increase of 8 percentage points in Factual programmes; from 16% of the total output in 2004 to 24% by 2008. In particular, there has been an increase in the proportion of Other Factual programming from 2007 to 2008 (from 8% to 11%). ‘Factual’ covers a wide range of programming: all types of Documentaries including Science & Technology, Nature & Wildlife and History, Factual Entertainment, Leisure programmes and Factual magazines.

Drama and Soaps have also taken up an increasing proportion of the weekly schedules, rising from 11% of output to 13%, while Films decreased by 2 percentage points to 10% in 2008. Children’s programmes have reduced from 12% in 2004 to 10% of output in 2008, and formal Education programmes from 6% to 3% in the same period.

Figure 2.8 – 24-hour output 2004 – 2008, main five PSB channels only



Source: Broadcaster returns.

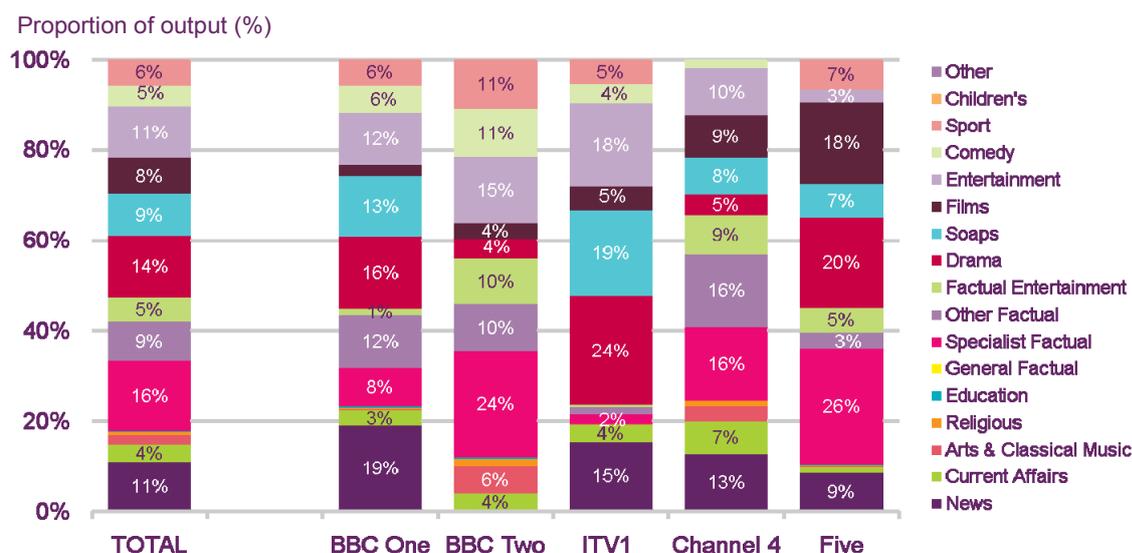
NB Arrows indicate where old genres (Entertainment, Drama incl. Soaps, and General Factual) map to new genres.

During peak time when audience levels are highest, the five main PSB channels aim to maximise their audience appeal, concentrating on different genres to build a competitive schedule. Figure 2.9 shows how the output in peak time varied by the five main PSB channels in 2008.

The BBC One and Two schedules often complement one another; for example, while 19% of BBC One's output in peak time consisted of News programmes, on BBC Two there were no News programmes but over a third of the output was in the Specialist Factual and Other Factual genres. By contrast, nearly a third of BBC One's peak-time schedule comprised Drama and Soaps, while only 4% of BBC Two's output was in this genre.

On ITV1 43% of peak time programmes was Drama and Soaps and 22% was Entertainment and Comedy, with only 4% consisting of Factual output. Channel 4 took a contrasting approach, with 41% of the peak-time schedule featuring Factual programmes and 13% Drama and Soaps. Five's schedule broke down into 34% Factual; 27% Drama and Soaps and 18% Films, which was a higher proportion of films than on any of the other five main channels.

Figure 2.9: Proportion of peak-time genre output by channel, main five PSB channels, 2008



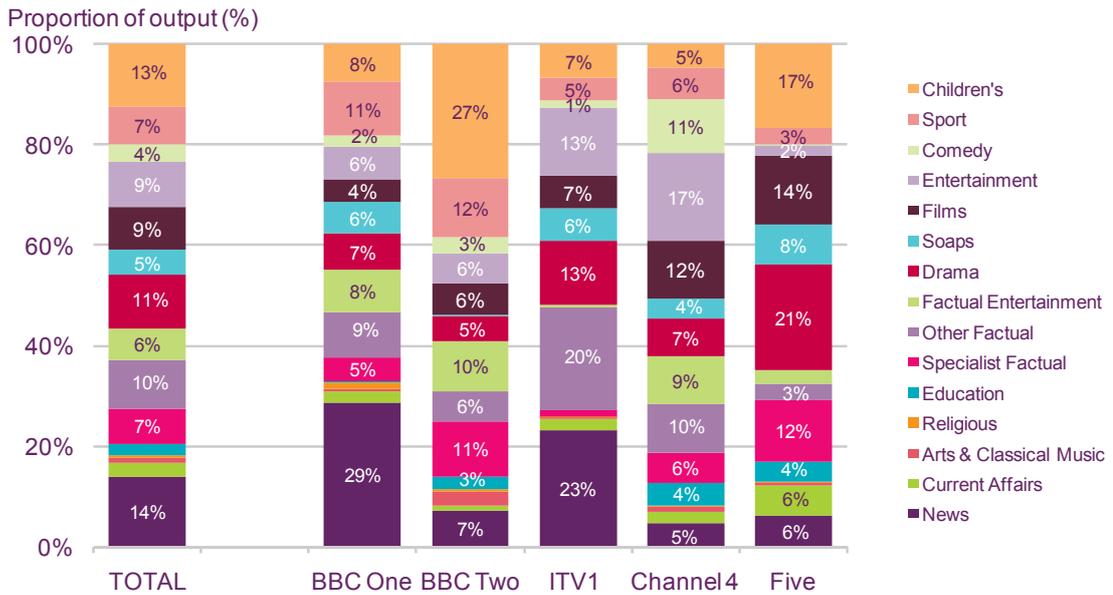
Source: Broadcaster returns

Figure 2.10 shows the programme output by the main five PSB channels across the main part of the day from 6 am to midnight⁵³. Much of the breakfast service on BBC One and ITV1 consists of News or news-related programmes, therefore the proportion of News is high, at 29% for BBC One and 23% for ITV1.

By contrast, on BBC Two and Five much of the early morning schedule is devoted to Children's programmes, especially Pre-school. The proportion of BBC Two's output in this genre was 27% and on Five it was 17%. Although ITV1's peak-time schedule does not feature a high proportion of Factual material, when considering the day up to midnight, 22% of its overall schedule consisted of various types of Factual programmes. The bulk of Five's schedule up to midnight was Drama, Soaps and Films (totalling 43%).

⁵³ The period 6 am to midnight was chosen in order to avoid any over-representation of a genre due to a high concentration of overnight output – for example the BBC News simulcasts on BBC One.

Figure 2.10: Proportion of genre output by channel, 6 am to midnight, 2008



Source: Broadcaster returns
 Note: Includes regional output

Channel viewing figures

Hours of viewing

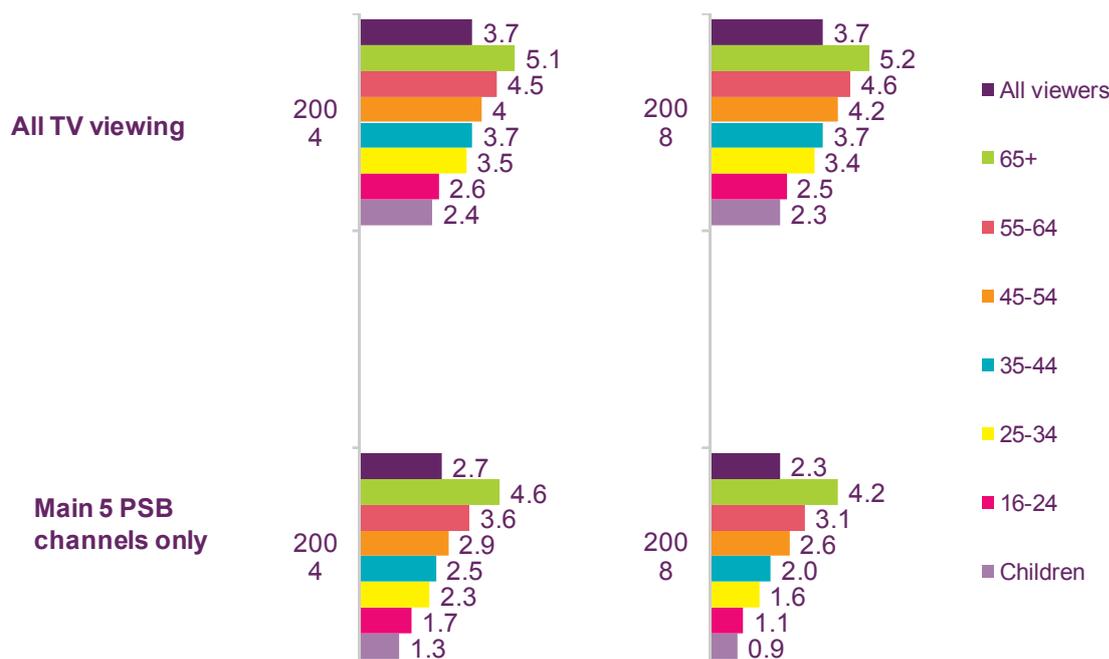
Figure 2.11 shows the average daily hours of viewing since 2004 for each age group, both for the main five PSB channels, and hours of television viewing generally.

The average hours of viewing of the five main PSB channels has declined by 15% since 2004, levelling out at 2.3 hours a day since 2007. Viewing of the main five PSB channels varied quite considerably across the different demographic groups in 2008; the oldest group viewed over four hours a day and children (4 to 15 years old) viewed for less than one hour a day.

The greatest reduction in viewing of the main five PSB channels between 2004 and 2008 was among those aged 44 or under; all age groups under 44 years old, as shown in Figure 2.6, decreased their viewing by least 30%. The oldest age group (65+) had the smallest reduction in hours of viewing of the main PSB channels: a decline of 9% in 2008 compared to 2004.

There was no decrease in the average hours of viewing to *all* television channels, taken together, for the average viewer from 2004 to 2008. However, among children, 16 to 24 year olds and 25 to 34 year olds there was a small decrease over this period. From 2007 to 2008 viewing of any television channel increased for all age groups except those aged 16 to 24.

Figure 2.11: Average hours of daily viewing, 2004 – 2008,



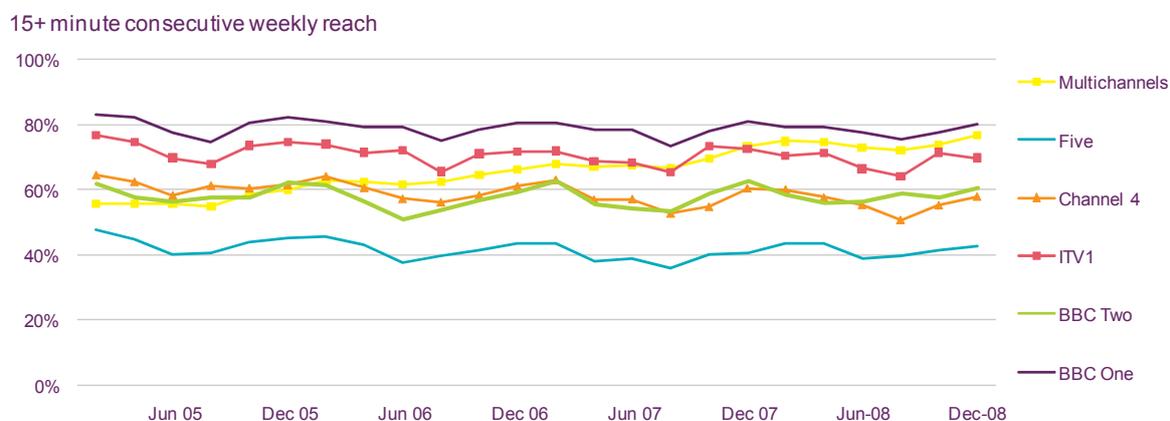
Source: BARB 2004 and 2008, Network
Average hours of viewing per day, main 5 PSB channels only vs. Total TV (all TV channels)

Reach in all homes

Average weekly reach is defined as the proportion of the population that watches at least 15 consecutive minutes of a channel in an average week. Figure 2.12 shows that all of the main PSB channels experienced a decline in their average weekly reach figures from December 2005 to December 2008, although some channels display a greater decline than others. BBC One, BBC Two and Five displayed the smallest rate of decline – 2 percentage points. ITV1’s average weekly reach fell by 5 percentage points, from 75% in Dec 2005 to 70% in Dec 2008, while Channel 4 declined by 4 percentage points.

The multichannel channels combined saw a 17 percentage point increase in their average weekly reach, from 60% in Dec 2005 to 77% in Dec 2008. This was driven in part by the continuing increase in take-up of multichannel television.

Figure 2.12: Weekly TV reach in all homes (all day)



Source: BARB

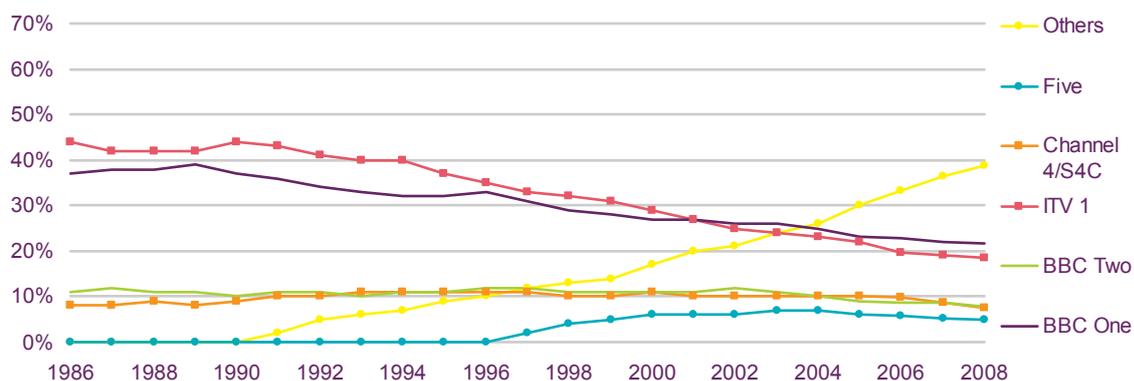
Share in all homes

Share of viewing is the percentage of the total viewing audience watching over a given period of time. Figures 2.13 and 2.14 show the share of each of the main five PSB channels, and the sum of all other multichannels, since 1985 and 1992.

The combined share of the main PSB channels declined 2.5 percentage points in 2008 since 2007. BBC One and Five remained fairly stable; both lost 0.2 percentage points. ITV1 and BBC Two lost 0.8 percentage points and Channel 4 declined by 1.1 percentage point in 2008.

In 2001, ITV1 and BBC One had equal viewing share at 27%, but since 2001 ITV1's share has declined more than BBC One's, falling by 9 percentage points from 2001 to 2008 compared with BBC One's decline of 5 percentage points. BBC Two's share has declined by 3 percentage points over the same period and Channel 4's by 2 percentage points, half of which was lost between 2007 and 2008. Comparing 2001 to 2008 shows that Five has lost the least share (1 percentage point). The multichannel channels combined increased their share by 18 percentage points over the same period.

Figure 2.13: Channel shares in all homes, 1985-2008



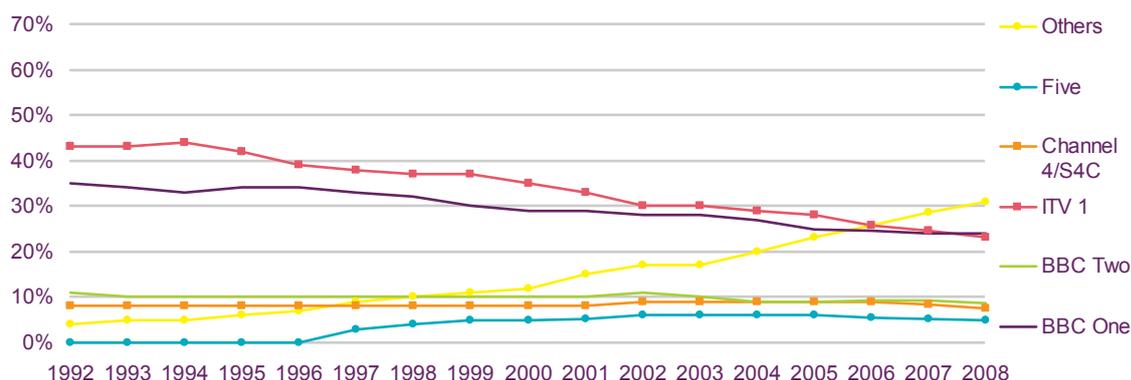
Source: BARB

When examining peak time in particular (6 pm to 10.30 pm) in Figure 2.14, we see that from 2007 to 2008 ITV1's share of viewing decreased by more than the other channels; 1.4 percentage points. BBC One's peak-time share remained stable over the same period. Channel 4 lost 0.9 percentage points from 2007 to 2008, bringing it back in line with its 2001 figure. BBC Two's share declined by 0.4 percentage points year on year, while Five's share declined the least, 0.2 percentage points.

The share of the multichannel channels combined increased by 2.3 percentage points in 2008 from 2007 and since 2001 has grown overall by 15 percentage points.

Looking at the longer trend since 2001 shows that BBC One's share has declined by 5 percentage points, compared to ITV1's decline of 10 percentage points. Historically, ITV1 has outperformed BBC one in terms of peak-time share, but 2008 appears to be the first year (since at least 1992) in which BBC One's peak-time share (24%) has exceeded that of ITV1 (23%).

Figure 2.14: Peak-time channel share in all homes, 1992 – 2008

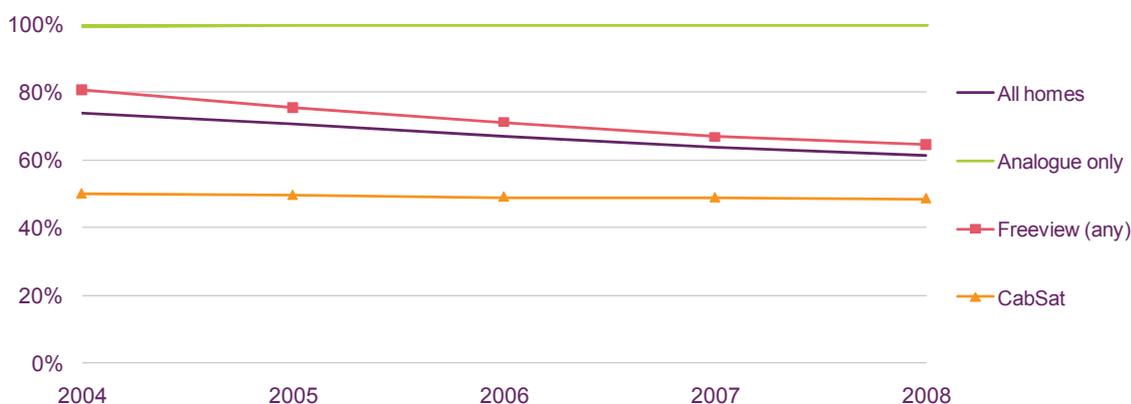


Source: BARB

Main PSB channels and their portfolio channels

Figure 2.15 shows the five main PSB channels’ share in homes with different television platforms. The total share of these channels across all homes has shown a continual decline from 2004, down 13 percentage points by 2008. The share of the five main PSB channels has decreased by 16 percentage points among homes with Freeview in this period. Note: the number of channels on the Freeview platform has grown over this period.

Figure 2.15: five main PSB channels’ share in homes with different platforms



Source: BARB

Figure 2.16 shows the share of viewing of each broadcaster group over time.

The main PSB broadcasters are the only broadcaster groups that have seen their total share increase in multichannel homes from 2004 to 2008, despite the fact that viewing in such homes is often more fragmented, due to the availability of increasing numbers of channels. The viewing figures show that all the main PSB groups have also increased their shares in the past year.

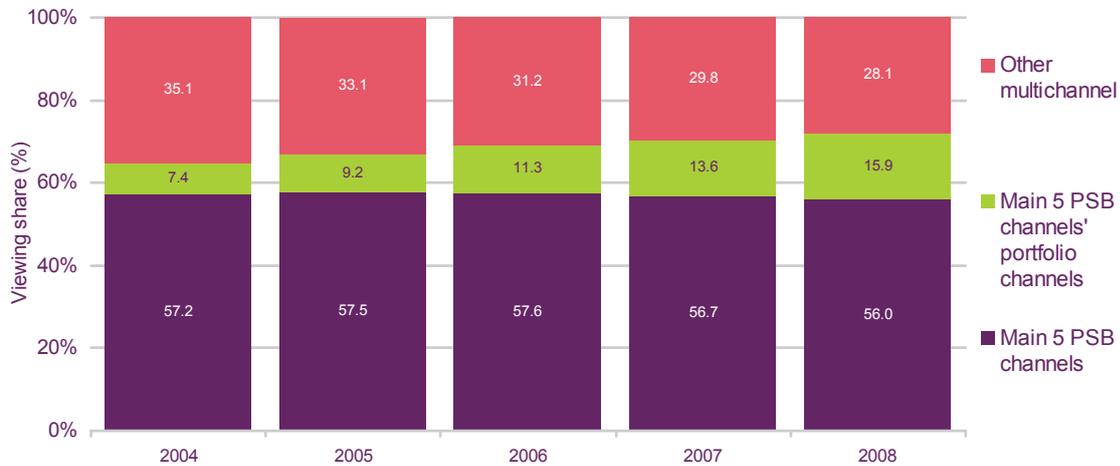
Figure 2.16: Broadcaster shares in multichannel homes, by broadcaster family



Source: BARB, All Multichannel Individuals (4+)

Looking at the share data in a different way shows that the overall increases in viewing share of BBC, ITV, Channel 4 and Five’s families of channels is due to the increasing popularity of their portfolio channels. Viewing of these channels has helped them to maintain share in the multichannel universe and even to increase it (see figure 2.17).

Figure 2.17: Broadcaster shares in multichannel homes;

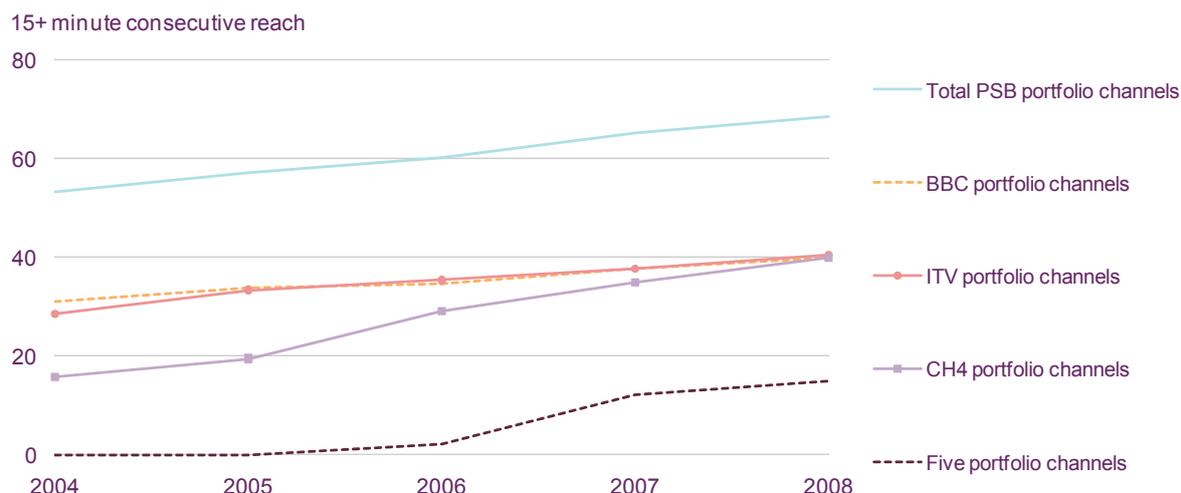


Source: BARB, all day, all Multichannel Individuals (4+)

There has been a steady increase in average weekly reach to all of the PSB portfolio channels combined since 2004 (see figure 2.18); from 53% in 2004 to 69% in 2008. The reach of each of the individual PSB broadcasters’ spin-off channels has also increased over this period.

Note: the actual number of channels that make up the PSB portfolios has increased over the years, and the proportion of people with multichannel television has also grown substantially year on year.

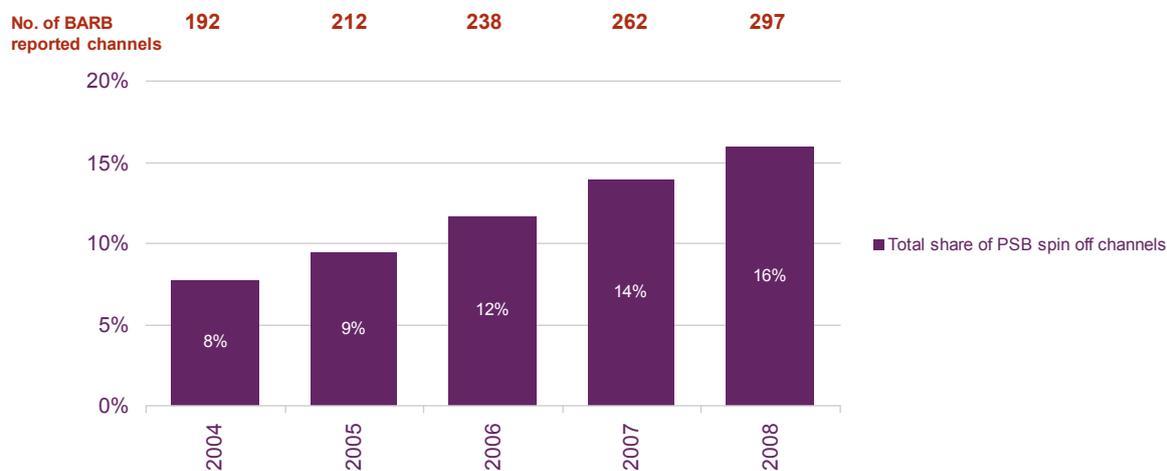
Figure 2.18: Average weekly reach of PSB portfolio channels, 2004 - 2008



Source: BARB, all individuals 4+
 *note over the years the actual number of channels has changed.

Since 2004 the number of BARB reported channels⁵⁴ has grown (Note: the number of portfolio channels has increased over the years). Figure 2.19 below shows that the viewing share of the PSB portfolio channels has grown, despite an increasingly fragmented viewing environment in which the number of channels is constantly increasing. Share has risen for the PSB portfolio channels from 8% in 2004 to 16% in 2008.

Figure 2.19: Channel share for portfolio channels combined vs. number of BARB reported channels, 2004 - 2008



Source: BARB, all individuals 4+

BARB audience profiles

Figure 2.20 shows the different age profiles of viewers, by channel, in 2008.

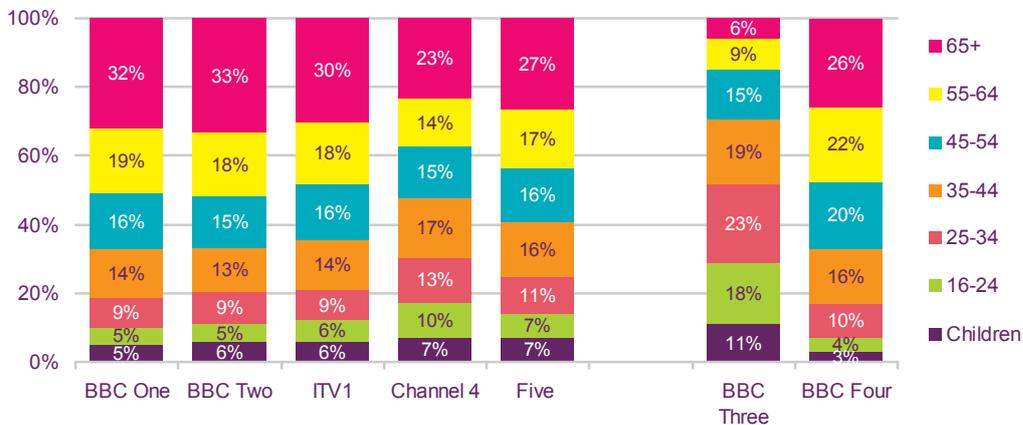
The audience profiles of BBC One, ITV and Five remained fairly stable in 2008 compared to 2006, when this was first reported in the *PSB Annual Report*. While BBC Two has the

⁵⁴ Note: the actual number of channels will be greater

highest proportion of viewers aged 65+, this proportion has declined slightly since 2006 (by 3 percentage points) resulting in BBC Two’s profile becoming slightly younger. Channel 4 has the highest proportion of 16-34 audiences of the main PSB channels (23%) although this has also declined since 2006 by 4 percentage points. This has been driven primarily by a decline in the proportion of viewers aged 25-34, who represented 16% of the audience in 2006, and 13% in 2008.

Looking at two of the BBC’s portfolio channels, BBC Three and BBC Four, BBC Three has the highest proportion of younger viewers; 29% aged between 4 and 24, up from 25% in 2006. This has been driven by the increase in audiences aged 16 to 24, from 14% in 2006 to 18% in 2008. There has also been an increase in viewers aged 25-34; up from a fifth of the audience in 2006 to almost a quarter (23%) in 2008. There has been a corresponding decline in the proportion of audience aged 35-54; from 40% in 2006 to 34% in 2008. BBC Four has seen a slight increase in the oldest age group, 65+, representing 22% in 2006 and 26% in 2008.

Figure 2.20: Age profile of channel viewers, 2008



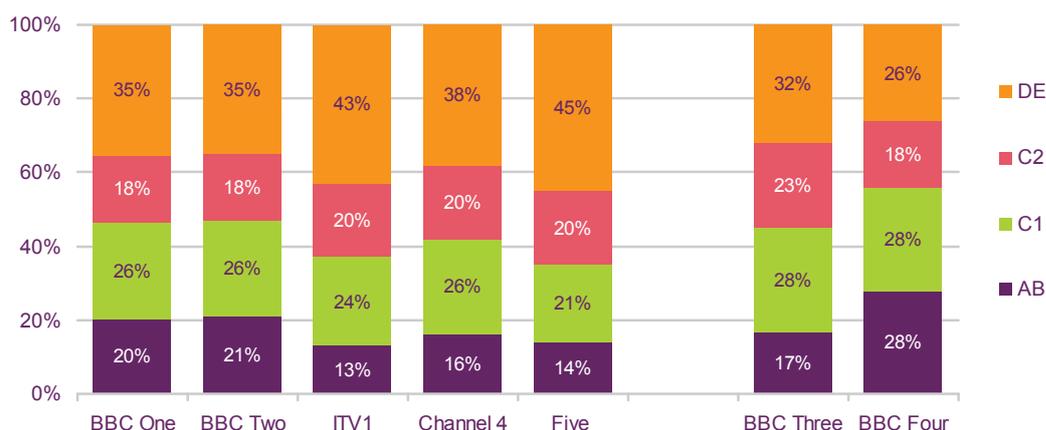
Source: BARB 2008, Network
Profile data calculated on a base of all individuals 4+

Figure 2.21 shows the socio-economic profile of the main PSB channels and BBC Three and Four. Of the five main PSB channels, BBC One and BBC Two attract the highest proportion of audience classified as AB. Five attracts the highest proportion of audience classified as DE, followed by ITV1. BBC Four attracts the highest proportion of AB viewers.

The socio-economic profile of ITV1, Channel 4, Five and BBC Three has remained fairly consistent since 2006. Focusing on BBC One, the proportion of audience classified as DE has declined slightly, from 38% in 2006 to 35% in 2008. BBC Two has also seen a slight decline in the proportion of DE audience (down 2 percentage points from 2006) and a subsequent increase in the proportion of audience classified as C1, from 24% in 2006 to 26% in 2008.

BBC Four’s socio-economic profile has shown a slight increase in the proportion of the audience classified as DE, up from 23% in 2006 to 26% in 2008. There has also been an increase in the proportion of audience classified as C2, up from 15% in 2006 to 18% in 2008. Subsequently there has been a reduction in the proportion of the audience classified as C1, from 32% in 2006 to 28% in 2008.

Figure 2.21: Channel profile, by socio-economic group: 2008



Source: BARB 2008, Network
 Profile data calculated on a base of all individuals 4+

Viewing by genre

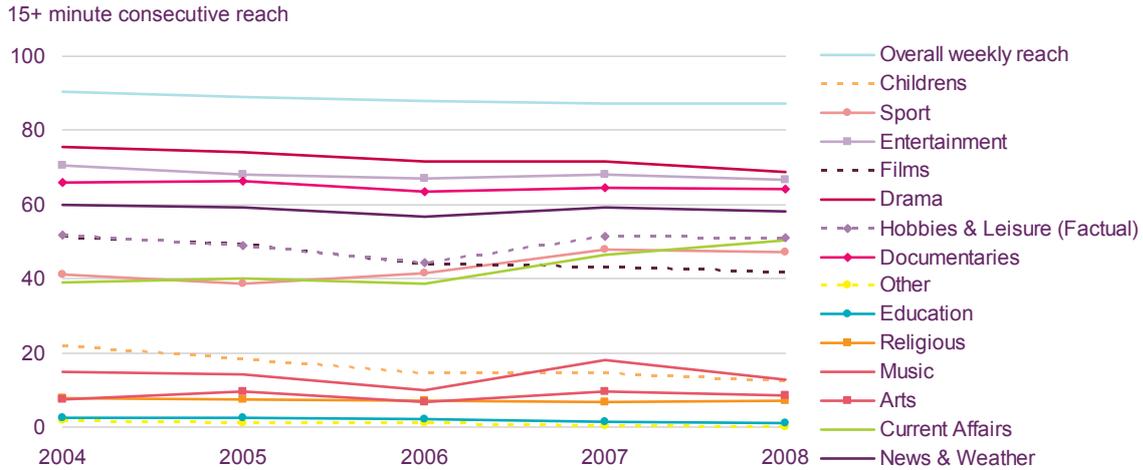
The earlier section describes what PSB broadcasters show on their channels, both aggregated and by channel. This next section describes the extent to which output is watched, and by whom. First, it sets out how the proportion of viewing of different genres across the main PSB channels has changed over time. It then examines viewing habits as they relate to particular channels. Finally, it examines particular sub-groups of viewers.

In terms of weekly reach, overall reach to all genres combined on the five main PSB channels has declined from 90% in 2004 to 87% in 2008 (see figure 2.22). Most genres have seen a decline in reach between 2004 and 2008, but the most marked has been to Children’s genre programming, where reach fell from 21.9% in 2004 to 12.5% in 2008. Section 9 looks in more detail at Children’s programming.

However, some genres have increased their reach from 2004 to 2008. Sport increased from 41.0% in 2004 to 47.1% in 2008. Both Arts and Current Affairs programming also saw increases; Arts increasing from 7.6% to 8.4% and Current Affairs up from 38.9% to 50.2%.

Looking at the reach data and the total annual hours of viewing (see figure in section 4) it is apparent that both the reach and average hours of viewing of Current Affairs have increased. But for Arts programming the total hours of viewing has gone down over the years; although more people are viewing, they are watching fewer total hours of this genre. See later sections for more detail.

Figure 2.22: Average weekly reach of main five PSB channels, by genre: 2004 – 2008



Source: BARB, all individuals 4+

Proportion of viewing of programme genres

Figure 2.23 shows that the proportion of peak-time viewing of Entertainment programmes across the five main PSB channels increased from 15% in 2004 to 18% in 2008. The proportion of viewing of Current Affairs has also shown an overall increase of 2 percentage points between 2004 and 2008.

The proportion of viewing of Films during peak-time across the five main PSB channels has decreased from 7% in 2004 to 5% in 2008. Viewing of Soaps decreased by 2 percentage points over this period. Drama decreased from 20% to 18% in the past year.

Figure 2.23: Proportion of viewing of different genres across the main PSB channels together, 2004-08, peak time, all individuals



Source: BARB, Network, five main PSB channels only

Figure 2.24 shows the proportion of viewing of different genres on the five main PSB channels, across the whole day. This shows that viewing of Current Affairs and Entertainment programmes increased from 2004 to 2008 (by 2% and 3%) and Films and Soaps have decreased from 2004 (both by 2%).

Figure 2.24: Proportion of viewing of different genres on the main PSB channels, 2004 - 2008, 24 hours



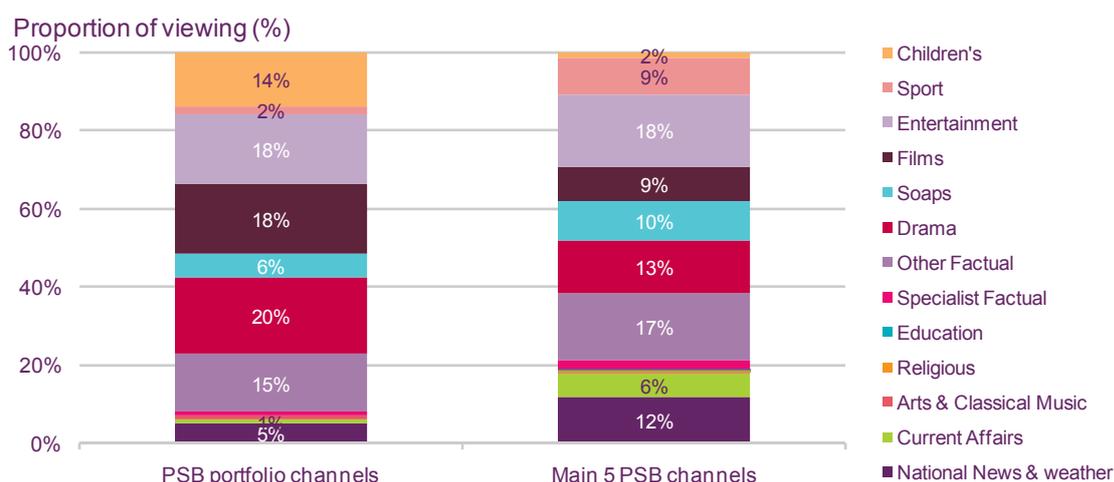
Source: BARB, Network, five main PSB channels only

Comparing viewing across the five main PSB channels with the PSB portfolio channels (see figure 2.25) shows that a different profile of genres is viewed on each.

Among the main PSB channels, a larger proportion of viewing is dedicated to News, Current Affairs, Specialist Factual, Other Factual, Soaps and Sport. Looking at the portfolio channels as a group, a greater proportion of viewing is dedicated to Drama, Films (double the proportion of viewing spent on the main PSB channels) and Children's programming.

Note: the output of the generalist five main channels is clearly different from that of the portfolio channels, many of which are dedicated to specific genres, e.g. Children's or Films.

Figure 2.25: Proportion of viewing of different genres on the main PSB channels vs. all portfolio channels, 24 hours, 2008

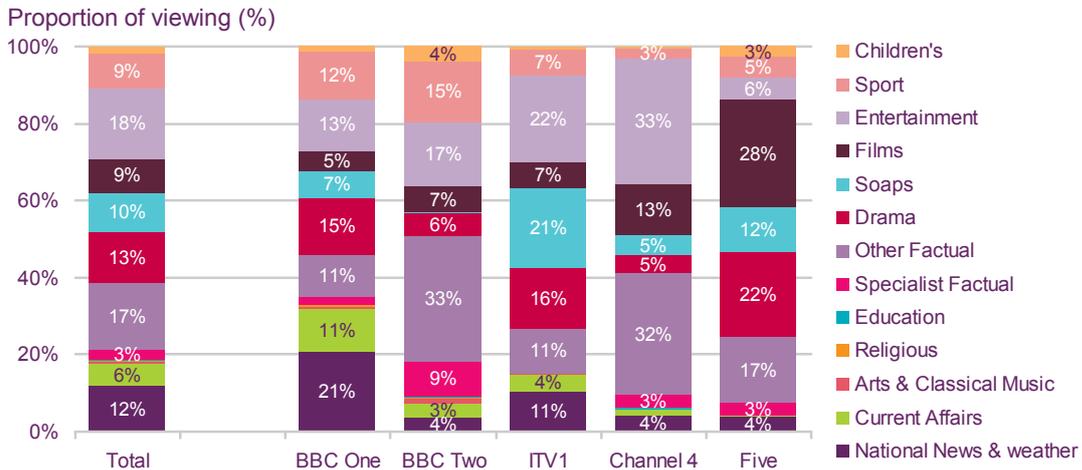


Source: BARB. Main PSB channels versus All portfolio spin off channels, 2004-2008, 24-hours, all individuals

Figure 2.26 sets out the proportion of viewing of different genres on each of the main PSB channels in 2008 across the entire day. This paints a picture of which genres people tend to watch on different channels. For BBC One, over a fifth of viewing was of UK/national News and Weather and 11% of viewing was of Current Affairs. For BBC Two, 9% of total viewing was of Specialist Factual, a third of viewing was of Other Factual, 15% was of Sport and 4% of Children's programming. Just over a fifth of total viewing of ITV1 was Soaps and a fifth

was Entertainment programming. A third of viewing to Channel 4 was Other Factual and a third was Entertainment programming, with Films making up 13% and Specialist Factual making up 3% of viewing. Thirty-nine per cent of viewing on Five was of Factual programming, over a fifth of viewing was of Drama and 28% was of Films.

Figure 2.26: Proportion of network⁵⁵ viewing by channel, 24 hours, 2008



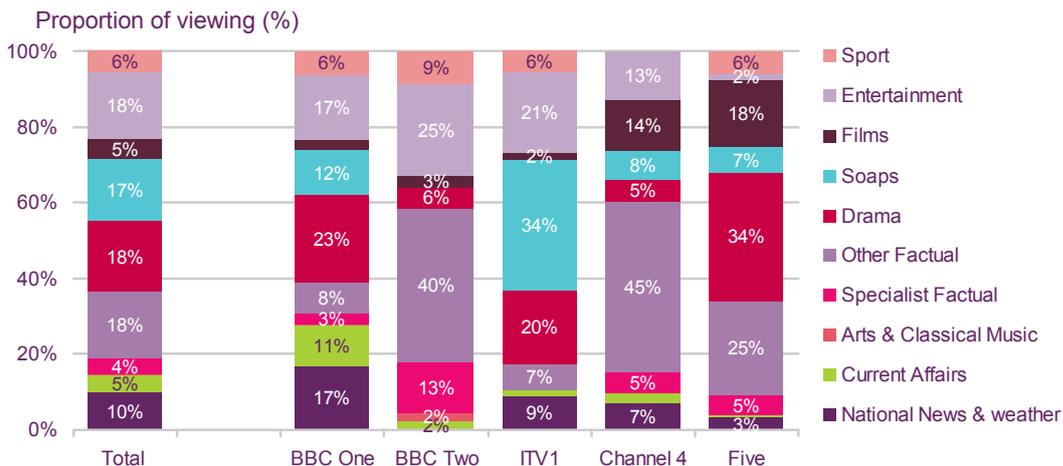
Source: BARB, Network, five main PSB channels only

Figure 2.27 shows the proportion of network viewing by channel during peak time in 2008. Drama comprised the bulk of viewing in peak time on BBC One. BBC One has the largest proportion among the five main PSB channels of UK/national News and Current Affairs in peak time. Forty per cent of viewing of BBC Two was of Other Factual programming and a quarter was of Entertainment. Thirteen per cent of total viewing to BBC Two was of Specialist Factual programming; higher than for any other main PSB channel.

Over a third to total viewing of ITV1 was of Soaps, with one-fifth was of Drama and Entertainment. Other Factual dominated viewing on Channel 4, with 45%, followed by Films at 14%. Specialist Factual made up 5% of viewing on this channel. Viewing of Five was dominated by Drama, which made up over a third of total viewing, followed by Other Factual, which made up a quarter of viewing, and Films which represented almost a fifth.

⁵⁵ Network viewing excludes nations/regions programming.

Figure 2.27: Proportion of network viewing by channel, peak time, 2008



Source: BARB, Network, five main PSB channels only

Figure 2.28 shows the *proportional, or relative*, amounts of viewing of different genres. Note: overall volumes of viewing are significantly higher for older people and lower for younger people. Looking at this profile of genres across ages shows some differences. The proportion of viewing of UK/national News and Weather increases with age; it makes up 7% of viewing among 16-24 age group, but more than double that among the 65+ age group (15%). The proportion of viewing of Current Affairs also increases slightly with age. Drama appears to increase slightly with age, while Soaps, Films and Entertainment programmes show a gradual decrease with age.

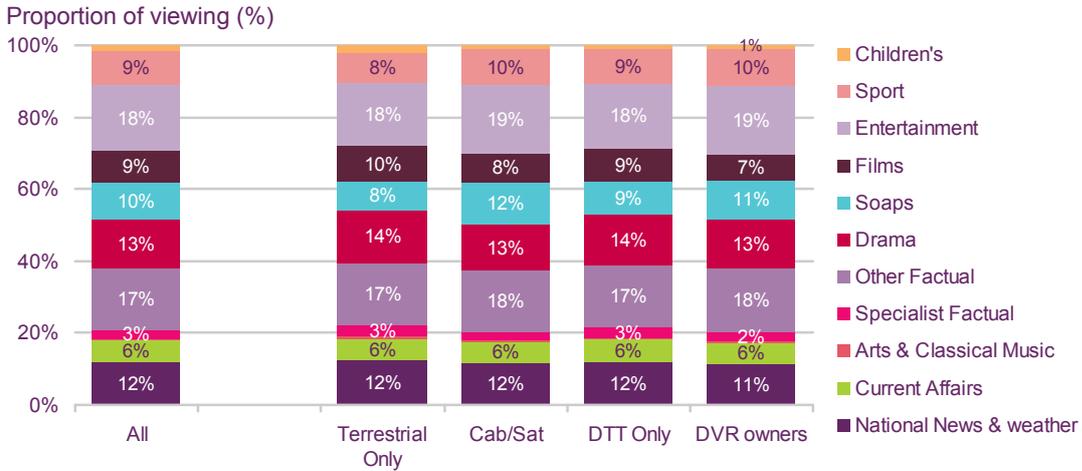
Figure 2.28: Split in total network viewing by age group (% of viewing), 2008



Source: BARB, Network, five main PSB channels only

Figure 2.29 illustrates the proportion of viewing of genres on the main five PSB channels by terrestrial-only viewers, those in multichannel homes and those with a digital video recorder (DVR) (regardless of what television service they have). Viewing of Soaps among terrestrial-only individuals and DTT-only individuals is at a similar level, while the proportion of viewing of Soaps is slightly higher among those with cable or satellite and those with a DVR. This is also true of viewing of Sports programming. Individuals in terrestrial-only homes devote a slightly higher proportion of their viewing to Films (10%), compared to individuals in cable or satellite homes and those with a DVR.

Figure 2.29: Proportion of viewing of genres on the main five PSB channels, all individuals, by platform, 24 hours, 2008

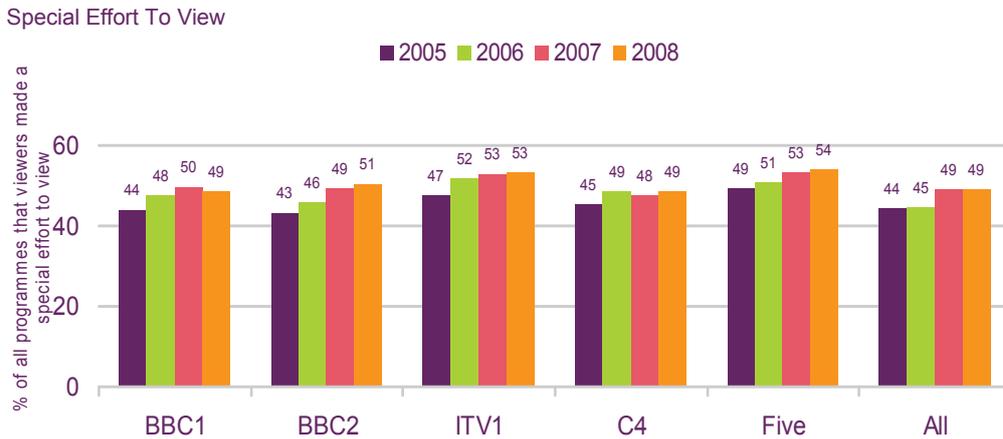


Source: BARB

Changing consumption patterns and audience impact

In the BBC-GfK Pulse survey⁵⁶, respondents were asked questions about specific programmes they had viewed on the previous day, including whether they had *‘made a special effort to view’* the programme. This survey shows that the proportion of all viewed programmes on the five main PSB channels that respondents had *‘made a special effort to view’* was 44% in 2005, but had increased to 49% by 2008. Increases were also recorded for all individual PSB channels against this measure from 2005 to 2008.

Figure 2.30: BBC Pulse data showing programmes that viewers ‘made a special effort to view’, 2005 to 2008



Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All programmes
 Base: 2005 (part year) 4.987m, 2006 5.346m, 2007 5.328m, 2008 5.434m

⁵⁶ The Pulse survey is a BBC-GfK online, nationally-representative panel of over 19,000 viewers that collects responses on programmes that were viewed on the previous day.

VoD: State of Play. Essential Research, 2008

Background

Essential Research conducted a study looking at VoD in the broadest sense, including services that offer choice and flexibility of what to watch (including on-demand services from TV service providers, DVRs and online services) from the consumer perspective. The study took place in June and September 2008 and included two waves of home visits, large-scale group workshops and a quantitative survey. Two separate visits were made to 17 households in and around London and around 40 participants, including children in the home, were spoken to. The quantitative survey was conducted online⁵⁷ among 721 UK adults aged 16+, with the bulk of the survey focusing only on respondents who had ever used VoD services.

Motivations for on-demand viewing and impact on overall viewing

The research found that mainstream audiences were increasingly able to offer examples of VoD benefits and are referring to VoD in positive terms in general TV conversation. Overall, the majority of VoD use so far had been driven by convenience and catch-up – although this may be partly attributable to the nature of the main VoD services and their marketing.

TV VoD services were often used to extend viewing choice after viewers had checked the linear TV schedules (and sometimes their DVR hard drives), while PC VoD services were generally chosen when viewers were seeking a specific programme that they had missed.

- 38% of VoD users listed 'catch-up' as their main reason for using
- 37% cited '*watching programmes at a time that suits me*'
- 20% of users selected a main reason that was based on exploring a wider range or having a greater choice of content.

(Base: 329 VoD users)

The research also found that most participants expected to watch 'better' TV rather than more TV as VOD services evolve. The content that participants most commonly expected in VoD services was films, premium dramas, channels' staple or flagship titles, comedy and kids' programming.

"I'd say we're watching the same amount of TV as we used to, but now it's better." (TV VoD user)

"I pretty much know what I like – I like dramas and documentaries, I don't like live TV and reality TV. I suppose (VoD) would be a good way to filter out the things I don't want"

In order to understand better non-linear TV viewing Ofcom commissioned a short survey that was run through GfK NOP's omnibus in March 2009⁵⁸. This research found that among those viewing non-linear television, a considerable proportion claimed that their use had increased in the past year:

- TV on-demand services: 65% of users use at least once a week, 44% claim to use this more now than a year ago
- DVR: 83% of users use at least once a week, 47% claim to use this more now than a year ago
- TV online: 55% of users use at least once a week, 57% claim to use this more now than a year ago

The omnibus also found that users of non-linear TV services claim that it enhances their general viewing experience (see Figure 2.31); 78% of users of TV on-demand services agreed that they '*watch more programmes that I enjoy because of on-demand services*

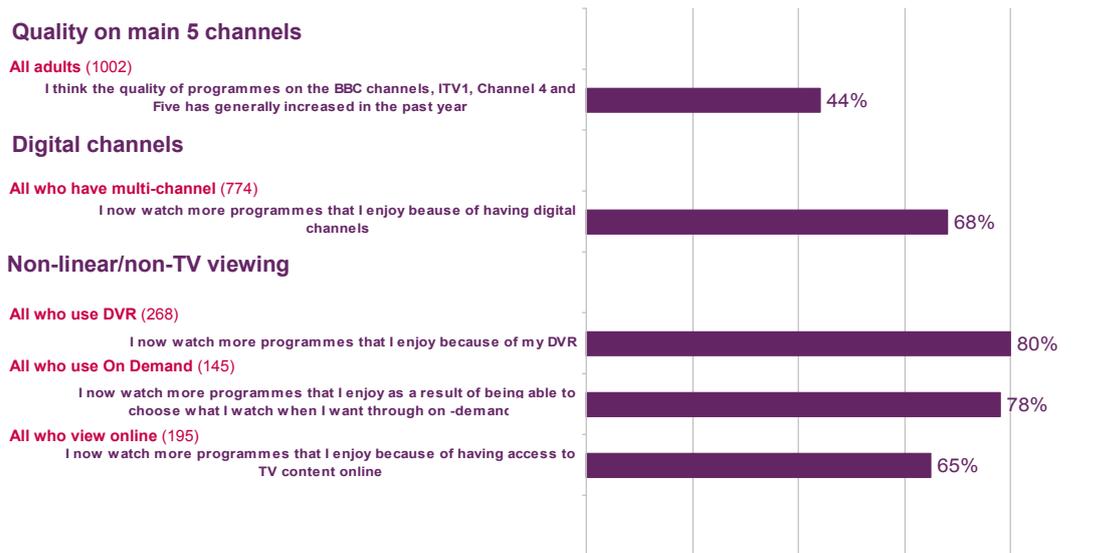
⁵⁷ It should be noted that an online sample is not necessarily representative of the UK adult population in that take-up of certain internet services may be higher than seen among the overall population.

⁵⁸ See Annex 1 for more details on this research.

through the TV', 80% of DVR users agreed they 'watch more programmes that I enjoy because of my DVR' and 65% of users of TV online agreed they 'watch more programmes that I enjoy because of having access to TV content online'

This research also found that among those with access to digital channels, two-thirds (68%) say they 'watch more programmes that I enjoy because of having digital channels' and among all adults two-fifths (44%) agree that 'the quality of programmes on the BBC channels, ITV1, Channel 4 and Five has generally increased in the past year'.

Figure 2.31 Viewers' opinions about the impact of non-linear TV viewing and the quality of programmes,

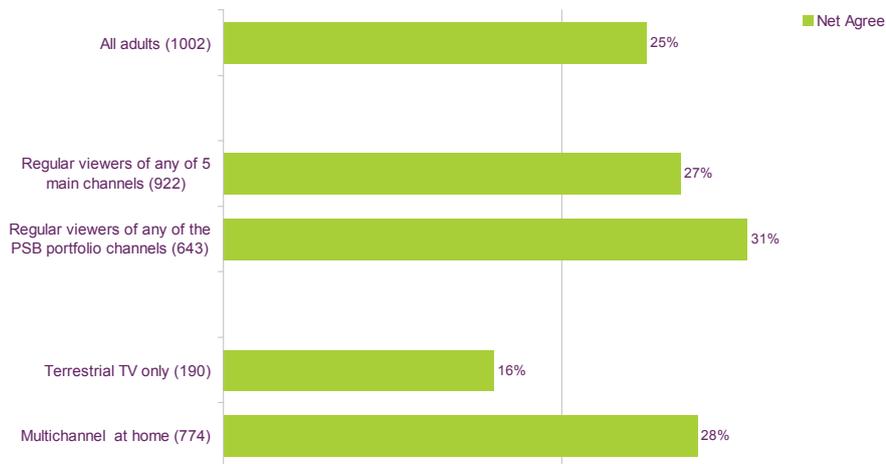


Source: PSB Omnibus, GfK NOP, March 2009, Q19
 Base: All adults (1002), see individual bases for more detail
 Q Do you agree or disagree with the following statements related to overall viewing?

When asked whether they 'appreciate [the main PSB] channels and their programmes more than I did in the past', 25% of adults agreed. Those with multichannel TV were more likely to agree with this statement than those with analogue-only TV.

Figure 2.32 Viewer appreciation of main PSB channels, by viewer sub-group

'I appreciate these channels and their programmes more than I did in the past'
- referring to the BBC channels, ITV1, Channel 4 (S4C in Wales) and Five



Source: PSB Omnibus, GfK NOP, March 2009, Q2

Base: All adults (1002) See individual bases for more detail

Q: I'd now like you to think about the BBC channels, ITV1, Channel 4 (S4C in Wales) and Five. How much do you agree or disagree with the following statement about these channels? 'I appreciate these channels and their programmes more now than I did in the past'

Section 3

Overview of PSB purposes and characteristics

Introduction

Ofcom's PSB purposes and characteristics were summarised in Phase 2 of Ofcom's first PSB Review⁵⁹ conducted throughout 2004 and reported on in 2005. The PSB channels are expected to together fulfil the purposes and characteristics, although it is also acknowledged that each PSB channel has a specific remit⁶⁰.

The purposes and characteristics were put into everyday language for the PSB Tracker survey, which asked respondents to give their opinions on the PSB statements⁶¹. This chapter provides an initial summary, looking at the overall importance ascribed to these elements of PSB by audiences, and their views on overall delivery by the PSB channels.

The sections which follow provide more detailed analysis of the ways in which each of these PSB purposes and characteristics are being fulfilled by the PSB channels individually.

Summary findings

- Across almost all of the research statements that reflect the purposes and characteristics, there was an increase in the proportion of the PSB audience that rated the PSB channels *together* highly on these in 2008 in comparison to at least one of the previous two years.
- Regular viewers of the five main PSB channels tended to have more positive opinions about the individual channels, across many of the research statements in 2008 compared to either 2007 or 2006 (where analysis over time is possible). For example, there was an increase in the proportion of regular viewers who rated the three or more of the main five channels highly on 11 out of the 17 comparable statements in 2008, from 2006 or 2007.
- Research statements that did not reflect such widespread positive shifts in opinion included :
 - Purpose 1 – *“its nations/regions News provide a wide range of good quality news about my nation/region”*. No channel saw an increase in ratings among regular viewers over time in any nation.
 - Purpose 3 – *“aside from news, it provides a range of good quality programmes about my nation”*. No channel saw an increase in ratings among regular viewers over time in any nation.

⁵⁹ http://www.ofcom.org.uk/consult/condocs/psb2/psb2/psb_phase2.pdf

⁶⁰ See the introduction section for the background to these, and the detail of what these are.

⁶¹ Viewers were asked to rate each channel on the statements using a 10-point scale. Within this report a rating of 7, 8, 9 or 10 has been taken as a positive response indicating that a viewer sees the channel/channels as delivering against this purpose/characteristic.

- Characteristic of *trust* – “*I trust this channel*”. Only BBC Two saw increases in the proportion of regular viewers who rated the channel highly on this.
- Characteristic of *engaging* – “*it shows programmes I want to watch*”. Of the five main channels, only Five increased the proportion of its regular viewers who rated the channel highly on this since 2006, while BBC One saw a decrease against this measure since 2007.
- If we focus only on increases since 2007,(see table 2), then we see that Channel 4 has increased its regular viewers’ ratings on more elements than the other main channels, and ITV1 and Five have increased on the fewest elements.

Purposes and characteristics

Figure 3.1 is a reminder of the research statements used to prompt respondents, and their links to the different elements of PSB purposes and characteristics.

Figure 3.1: PSB purposes and characteristics and the PSB Tracker statements

PSB purposes and characteristics	PSB Tracker statements
Purpose 1: To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas	Its news programmes are trustworthy Its programmes help me understand what’s going on in the world today Its news programmes for people in (nation) provide a wide range of good quality news about (nation) (asked in the devolved nations) ⁶² Its Regional News programmes provide a wide range of good quality news about my area (asked in England)
Purpose 2: To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning	It shows interesting programmes about history, sciences or the arts As a result of watching its programmes I’ve become more interested in particular subjects
Purpose 3: To reflect and strengthen our cultural identity through original programming at UK, national and regional level, and by occasionally bringing audiences together for shared experiences	It covers big national events well, like sports, music events or major news stories It shows high quality Soaps or Drama made in the UK Provides a wide range of high quality and UK-made programmes for children ^{63*} Aside from news, it provides a range of good-quality programmes about my Nation, made for people in my nation It portrays my region well to the rest of the UK Its entertainment and factual programmes show people from different parts of the UK
Purpose 4: To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere	Its programmes show different kinds of cultures within the UK** Its programmes offer a range of opinions on subjects and issues**
High quality – well-funded and well-produced	It shows well-made, high quality programmes
Original – new UK content rather than repeats or	It shows enough new programmes, made in the UK

⁶² In previous PSB Annual Reports findings relating to nations and regions news were reported in sections relating to Purpose 3.

⁶³ Before July 2008 parents /guardians were asked to rate the main PSB channels *excluding CBBC and CBeebies* that the parents themselves regularly viewed (to get an informed opinion). These data are included in this overview section in order to give a view over time. In order to improve this measurement, from July 2008 parents/guardians were asked about *CBBC and CBeebies in addition to the five main PSB channels* and were asked about the channels that their child regularly watches.

acquisitions	
Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones	It shows programmes with new ideas and different approaches
Challenging – making viewers think	It shows programmes that make me stop and think
Engaging – remaining accessible and attractive to viewers	It shows programmes I want to watch Its programmes reflect the interests and concerns of people like me
Trust ⁶⁴	I trust this channel*

* Statements added to the PSB Tracker in 2007. ** Two statements included from Q3 2008 to provide more detail than previously collected using the single statement 'Its programmes show different kinds of cultures and opinions within the UK'

The importance of PSB purposes and characteristics

Figures 3.2 and 3.3 show the perceived importance of the PSB purposes and characteristics for the PSB channels⁶⁵.

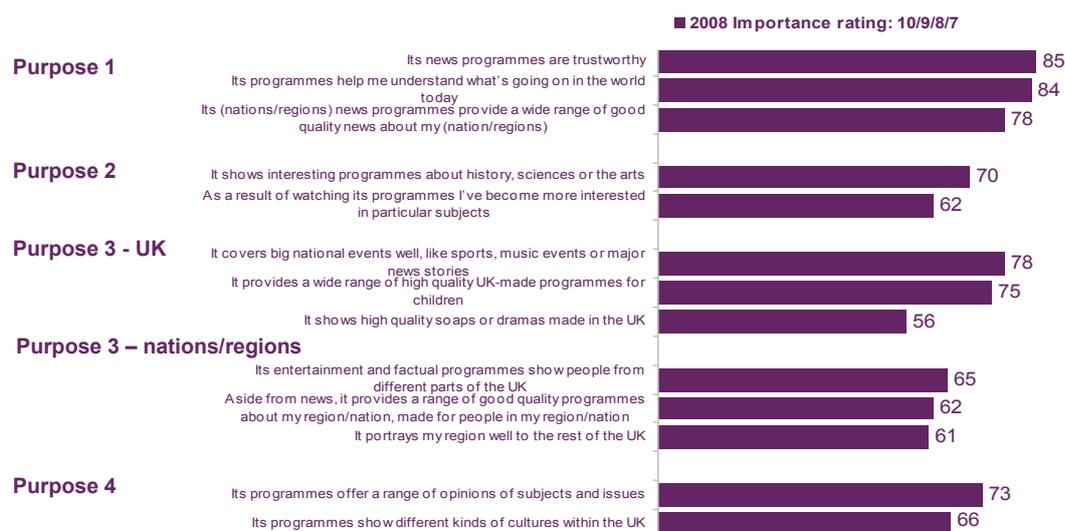
In 2008 there was a very similar overall picture of the importance of the purposes and characteristics to that identified in the previous *PSB Annual Report* (based on data collected in 2007). All purposes and characteristics continue to be rated as important by the majority of people in the UK.

Among the purposes, purpose 1 remains the one that people are most likely to see as important, with over eight in ten people saying that it is important for public service broadcasting: '*Its news programmes are trustworthy*' and '*Its programmes help me understand what's going on in the world*'.

⁶⁴ *Trust* was in the PSB Tracker survey in 2007, partly in relation to the issues surrounding phone voting within programmes on the PSB channels. However, the overall *trust* people place in channels is an area that may become more important in the future with the blurring between TV and other delivery platforms, and the proliferation of sources of TV content.

⁶⁵ Respondents were prompted to think about BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three, BBC Four, BBC News and BBC Parliament. Note that CBBC and CBeebies were not prompted within this data – see section on Children's TV for more detail and data on these channels in particular.

Figure 3.2: The importance of PSB purposes, 2008



*Extent to which it is important that BBC One, BBC Two, ITV1, Channel 4 (S4C), Five, BBC Three, BBC Four, BBC News and BBC Parliament do this, where 10 means 'extremely important' and 1 means 'not at all important'

Base = All respondents (half sample). 2008 = 3403, amalgamated data: Jan-Dec 08

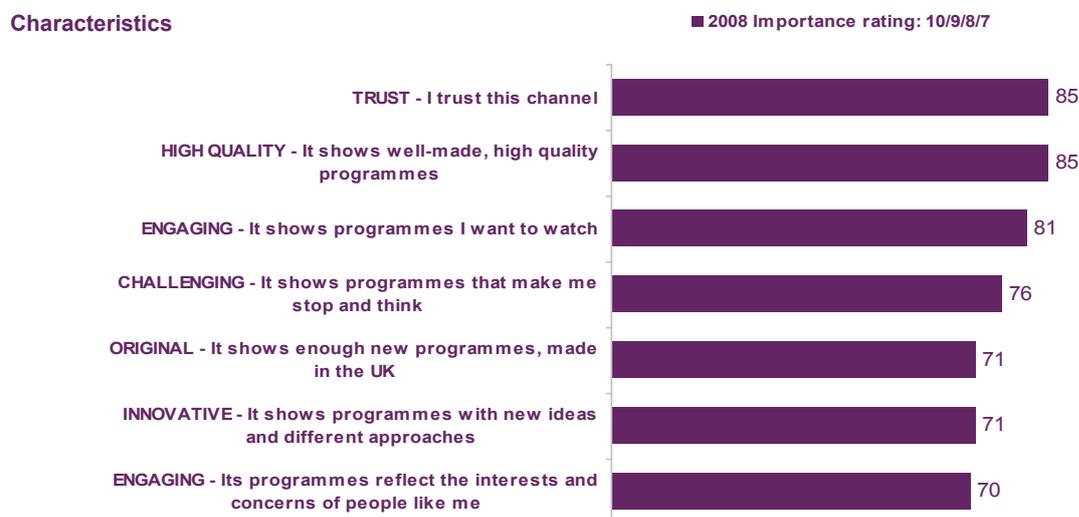
NB statement for nations/regions news referred to specific nations after Q3 08. Data for children's statement shown for Jan – July only

Purpose 4 data for July-Dec only (as previous statement was split in Q3)

Source: Ofcom PSB Tracker, GfK NOP

Among the PSB characteristics, *high quality* and *trust* were seen as important by the largest proportion of people (85%). However, the other characteristics were also seen as important by 70% or more of people asked (Figure 3.3).

Figure 3.3: The importance of PSB characteristics



*Extent to which it is important that BBC One, BBC Two, ITV1, Channel 4 (S4C), Five, BBC Three, BBC Four, BBC News and BBC Parliament do this, where 10 means 'extremely important' and 1 means 'not at all important'

Base = All respondents (half sample). All Channels Combined, 2008 = 3403

Amalgamated data: (Jan-Dec 08)

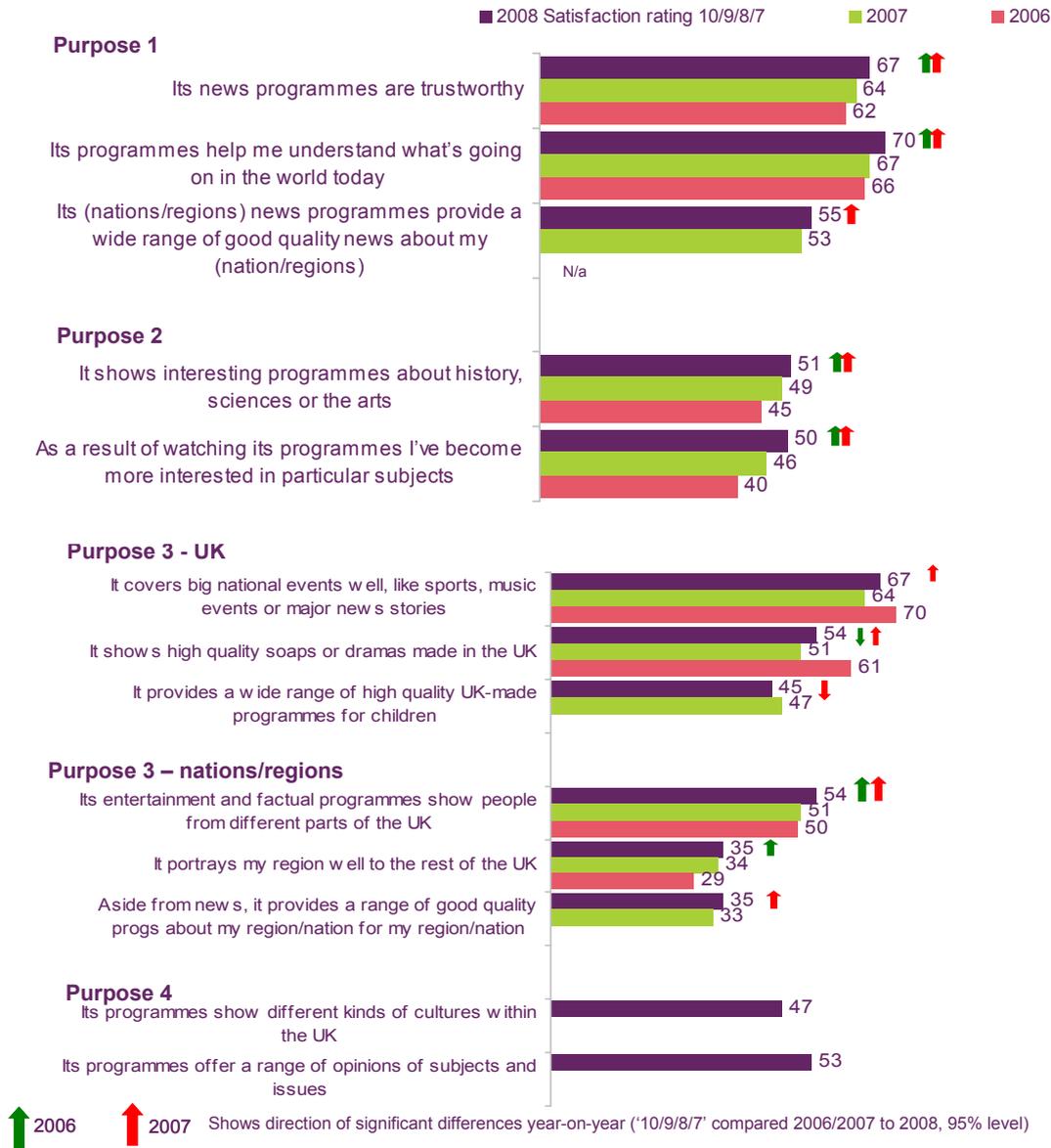
Source: Ofcom PSB Tracker, GfK NOP

The delivery of PSB purposes and characteristics

Figures 3.4, 3.5 and 3.6 set out what people who watch any of the PSB channels, at least occasionally, think of the delivery of PSB by all the PSB channels taken together since 2006. Note: later sections of this report will look at each individual purpose and characteristic in depth. This overview shows that across almost all of the purpose and characteristic research statements there was an increase in the proportion of the PSB audience who rated

the channels highly in 2008, in comparison to 2006 or 2007. The statements that related to *covering big national events well* (purpose 3), *high quality UK-originated soaps* (purpose 3) and having *high-quality UK-made children’s programmes* (purpose 3) are the only statements to have seen any decreases in ratings in either 2007 or 2008.

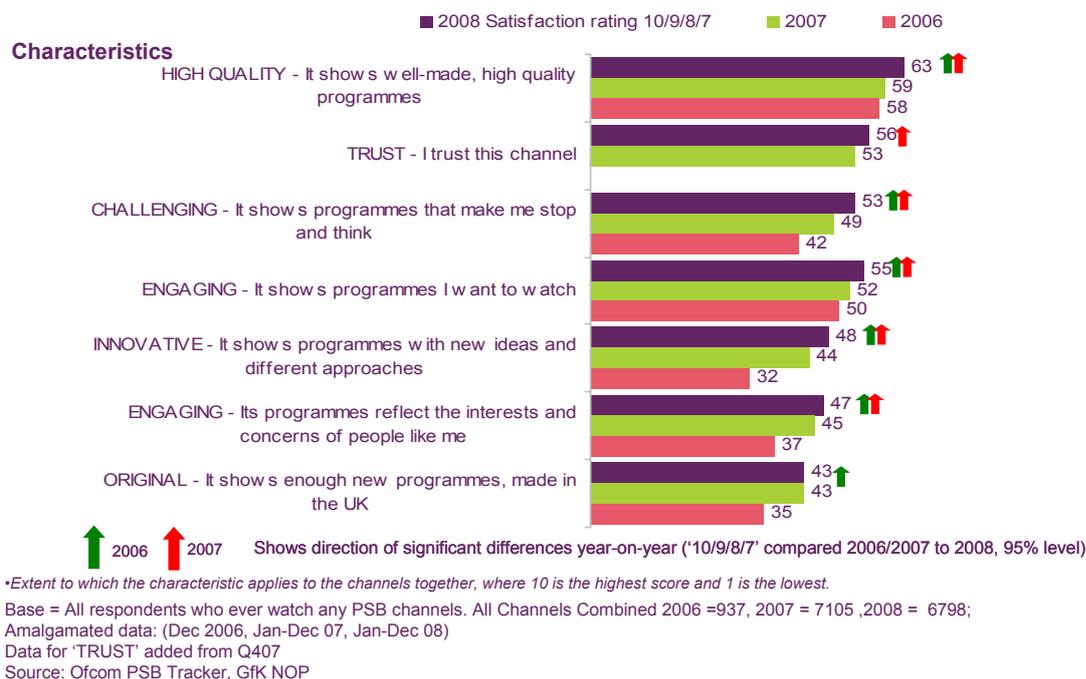
Figure 3.4: The delivery of PSB purposes⁶⁶



*Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.
 Base = All respondents who ever watch any PSB channels. All Channels Combined 2006 = 937, 2007 = 7105, 2008 = 6798;
 Amalgamated data: (Dec 2006, Jan-Dec 07, Jan-Dec 08). Data for P4 statements is from Q3/Q3 2008 only as these were added
 Data for children's statement for Q1-Q3 2008
 Source: Ofcom PSB Tracker, GfK NOP

⁶⁶ Before July 2008 parents or guardians of children aged under 16 were asked to rate the main PSB channels *excluding CBBC and CBeebies* on having a range of high quality and UK-made programmes for children. Parents were asked about channels that the parents themselves regularly viewed to get an informed opinion. In order to improve this measurement, from July 2008 parents or guardians were asked to give opinions on *CBBC and CBeebies* in addition to the five main PSB channels and parents were asked opinions on the channels that their child regularly watched. This chart contains the pre-July 08 data to give a perspective over time.

Figure 3.5: The delivery of PSB characteristics



Focusing on the individual contributions of the five main PSB channels, as perceived by regular viewers, also identifies that more positive opinions tended to be found across many of the purpose and characteristic research statements in 2008 than in either 2007 or 2006 (where analysis over time is possible). For example, there has been an increase in the proportion of regular viewers who rate at least two of the main five channels highly in 13 out of the 17 comparable statements in 2008, in comparison to either 2006 or 2007. For 11 of the statements, three or more of the five main PSB channels had higher ratings in 2008 than in either of the previous two years (see Figure 3.6). This is a confirmation of the trend first identified in the *2008 PSB Annual Report*, which reported that regular viewers' opinions of each of the channels had improved across a number of measures in 2007 compared to 2006⁶⁷.

Statements that did not see such widespread positive shifts in opinion included:

- Purpose 1 – “its nations/regions News provide a wide range of good quality news about my nation/region”. No channel saw an increase in ratings among regular viewers over time in any nation.
- Purpose 3 – “aside from news, it provides a range of good quality programmes about my nation”. No channel saw an increase in ratings among regular viewers over time.
- Characteristic of *trust* – “I trust this channel”. Only BBC Two saw increases in the proportion of its regular viewers who rated the channel highly on this.
- Characteristic of *engaging* – “it shows programmes I want to watch”. Of the five main channels, only Five increased the proportion of its regular viewers who rated the

⁶⁷ PSB Annual Report, 2008, Ofcom, Page 4 http://www.ofcom.org.uk/tv/psb_review/annrep/psb08/

channel highly on this, while BBC One saw a decrease against this measure since 2006.

If we focus only on increases since 2007 (see Figure 3.7), we see that Channel 4 has increased its regular viewers' ratings on more elements of PSB delivery than the four other PSB channels. ITV1 and Five have increased on the fewest elements. All channels, except Five, have increased on the characteristic of *quality* in 2008 compared to either of the previous two years.

Figure 3.6: Ratings of regular viewers of each channel⁶⁸, 2008 vs. 2006/ 2007:

Figures = % of regular viewers rating the channel as 7/8/9/10 in 2008. *n/a = data not collected for channel on this measure.
  = significant changes in % of regular viewers rating the channel as 7/8/9/10 in 2008 vs. either 2006 or 2007

	<i>Research statements</i>	BBC One	BBC Two	ITV1	Channel 4	Five	
Purpose 1:	Its news programmes are trustworthy	79 	70	68 	57	42 	
	Its programmes help me understand what's going on in the world today	83 	69 	67 	55 	38 	
	Its nations/regional News programmes provide a wide range of good quality news about my nations/ area	England	68 	* n/a	62	* n/a	* n/a
		Scotland	60	* n/a	55 	* n/a	* n/a
		Wales	65	* n/a	59	* n/a	* n/a
N.I.		77	* n/a	72	* n/a	* n/a	
Purpose 2:	It shows interesting programmes about history, sciences or the arts	58 	78 	29	51 	27	
	As a result of watching its programmes I've become more interested in particular subjects	53 	59 	43 	52 	36 	
Purpose 3:	It covers big national events well, like sports, music events or major news stories	80	66 	67	47 	33	
	It shows high quality Soaps or Drama made in the UK	63 	45 	66 	43 	31	
	It portrays my region well to the rest of the UK	41 	30 	39	23 	18	
	Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation	England	42	28	41	* n/a	* n/a
		Scotland	40	34	36	* n/a	* n/a
		Wales	45	41	35	* n/a	* n/a
N.I.		57	36	47	* n/a	* n/a	
Its entertainment and factual programmes show people from different parts of the UK	60 	56 	53 	54 	35 		
High quality:	It shows well-made, high quality programmes	78 	81 	66 	67 	49 	
Original:	It shows enough new programmes, made in the UK	52 	54 	47 	46 	26	
Innovative:	It shows programmes with new ideas and different approaches	48 	56 	42 	59 	38 	
Challenging:	It shows programmes that make me stop and think	58 	67 	46 	63 	40 	
Engaging:	Its programmes reflect the interests and concerns of people like me	52 	55 	46 	49 	30 	
	It shows programmes I want to watch	62 	63	57	60	50 	
Trust:	I trust this channel	72	76 	59	60	45	

⁶⁸ The research statements for Purpose 4 were improved in 2008, therefore no data before 2008 are shown. Before July 2008 parents/carers of children were asked to rate the main five PSB channels on having a range of high quality and UK-made programmes for children. Parents were asked about channels that the parents themselves regularly viewed to get an informed opinion. From July 2008, parents/carers were asked to give opinions on CBBC and CBeebies in addition to the five main PSB channels and were asked opinions on the channels that their child regularly watched. The post-July 2008 data give a more useful perspective on the individual channels, but as there is no data over time, no data are shown in this table for the measure for Children's programming.

Figure 3.7: Ratings of regular viewers of each channel⁶⁹, 2008 vs. 2007 only:

Figures = % of regular viewers rating the channel as 7/8/9/10 in 2008. *n/a = data not collected for channel on this measure
  = significant changes in % of regular viewers rating the channel as 7/8/9/10 in 2008 vs. 2007

	<i>Research statements</i>	BBC One	BBC Two	ITV1	Channel 4	Five	
Purpose 1:	Its news programmes are trustworthy	79 	70	68	57	42	
	Its programmes help me understand what's going on in the world today	83 	69 	67	55 	38 	
	Its Nations/regional News programmes provide a wide range of good quality news about my nation/area	England	68	* n/a	62	* n/a	* n/a
		Scotland	60	* n/a	55 	* n/a	* n/a
		Wales	65	* n/a	59	* n/a	* n/a
N.I.		77	* n/a	72	* n/a	* n/a	
Purpose 2:	It shows interesting programmes about history, sciences or the arts	58 	78	29	51 	27	
	As a result of watching its programmes I've become more interested in particular subjects	53	59 	43	52 	36	
Purpose 3:	It covers big national events well, like sports, music events or major news stories	80	66 	67	47	33	
	It shows high quality Soaps or Drama made in the UK	63 	45 	66	43 	31	
	It portrays my region well to the rest of the UK	41	30	39	23	18	
	Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation	England	42	28	41	* n/a	* n/a
		Scotland	40	34	36	* n/a	* n/a
		Wales	45	41	35	* n/a	* n/a
		N.I.	57	36	47	* n/a	* n/a
Its entertainment and factual programmes show people from different parts of the UK	60	56	53	54 	35		
High quality:	It shows well-made, high quality programmes	78 	81 	66 	67 	49	
Original:	It shows enough new programmes, made in the UK	52	54	47	46 	26	
Innovative:	It shows programmes with new ideas and different approaches	48	56 	42	59 	38	
Challenging:	It shows programmes that make me stop and think	58	67	46	63 	40	
Engaging:	Its programmes reflect the interests and concerns of people like me	52	55	46	49	30	
	It shows programmes I want to watch	62 	63	57	60	50	
Trust:	I trust this channel	72	76 	59	60	45	

⁶⁹ The research statements for Purpose 4 were improved in 2008, therefore no data before 2008 are shown. Before July 2008 parents/carers of children were asked to rate the main five PSB channels on having a *range of high quality and UK-made programmes for children*. Parents were asked about channels that the parents themselves regularly viewed to get an informed opinion. From July 2008, parents/carers were asked to give opinions on *CBBC and CBeebies in addition to the five main PSB channels* and were asked opinions on the channels that their child regularly watched. The post-July 2008 data give a more useful perspective on the individual channels, but as there is no data over time, no data are shown in this table for the measure for Children's programming.

Section 4

PSB purpose 1: *informing our understanding of the world*

Introduction

This chapter examines the first PSB purpose, as summarised in Ofcom's 2004 *PSB Review*:

To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas

This chapter focuses on News and Current Affairs programming as the key genres delivering this PSB purpose. Other genres, for example Specialist Factual, could also have been included here, but for the purposes of clarity of reporting they are included in the PSB purpose relating to informal learning. The emphasis in this chapter is upon the two genres which encapsulate *current* events and ideas.

Previously the research statement focusing on nations/regions News was reported as part of purpose 3 -*Reflecting UK cultural identity*. This statement straddles both purposes; however, given its specific focus on News, this will now be reported on as part of Purpose 1.

News programming is a genre which all main PSB broadcasters have a statutory duty to provide, and as such this purpose is directly applicable to all. However, this is particularly relevant to BBC One and ITV1/STV/UTV/ITV1 Wales in relation to their nations and regions output. The channels that are therefore the focus of this section are the five main PSB channels, plus BBC Three, BBC Four and BBC News 24/BBC News.

It should be noted that BBC News 24/BBC News was first included on the PSB Tracker from April 2007 - no data exist before this time for this channel. Please also note that we do not look at BBC Parliament in any detail in this report, although it is likely that it contributes to the BBC's overall delivery of PSB content in this area.

The *Second Review of PSB* highlighted that purpose 1 – informing our understanding of the world (including UK/International News and Current Affairs and nations and regions News and Current Affairs) was an audience priority for UK-originated provision and for provision on more than one of the main channels.

Summary findings

Output

- The volume of UK/national News⁷⁰ output across the whole day has remained relatively stable over the past three years, with the volume at 5,438 hours in 2008 (although this is lower than the volume seen in 2005 at 5,817 hours). Within this, there were small reductions in News output by BBC One, ITV1 and Five from 2007 to 2008. These decreases were offset by a significant increase (55%) of News volume shown on BBC Two.

⁷⁰ UK/national News refers to network news and excludes non-network news (referred to as nations/regions News in this report).

- Peak-time News output increased in 2008 to a level closer to that seen in 2005 (901 hours in 2008 compared to 928 hours in 2005). This was largely driven by ITV1's increased peak-time News provision with the re-introduction of *News at Ten*, which was back on air in the regular time slot for the first time in nine years.
- Between 2005 and 2008, all-day Current Affairs output increased by 56 hours or 4% to 1,550 hours, although the overall level between 2007 and 2008 fell slightly from 1,573 hours or 1%. BBC One, Five and BBC Three drove this longer-term increase, with all other channels reducing their Current Affairs output over the period.
- Changes in the volumes of non-network News and Current Affairs varied by nation:
 - In England, there has been steady growth in the volume of News and Current Affairs programmes on BBC One and Two over the last five years (by 11% or 417 hours over this time); most of which were regional News programmes. As previously reported, there was an under-delivery of nations/regions News on ITV in England in 2007, as regional news slots were dropped during the year. After Ofcom's intervention, they were reinstated and the quotas were met in full in 2008 with a resultant increase in the number of hours broadcast, compared with 2007.
 - In Scotland, the levels of STV nations/regions News and Current Affairs increased slightly in 2008 from 2007, although the volume in 2008 (635 hours) was still lower than that broadcast in 2004 (down by 182 hours or 22%). The overall volume of BBC nations/regions News and Current Affairs in 2008 was slightly down on 2004 (by 6% or 34 hours).
 - In Wales, the BBC has reduced non-network News output year-on-year since 2004 (by 88 hours or 18%), while the volume of nations Current Affairs was more stable. The levels of non-network News and Current Affairs output on ITV1 Wales have remained relatively stable in this period.
 - In Northern Ireland, the BBC increased the amount of nations/regions News and Current Affairs broadcast in 2008 compared with 2004; the BBC by 74 hours or 20%, while UTV has decreased their output by 54 hours or 14%. In both 2007 and 2008, the BBC broadcast a greater number of hours of these two genres than UTV; this had not been the case in the previous three years.

Viewing

- The average hours of **UK/national News** watched per year per individual on the main five PSB channels has fallen since 2004, down by 9 hours to 89 hours in 2008 – the largest decrease was for ITV1 (down by six hours or 21%).
- Overall, there has been an increase in the average hours of Current Affairs watched on the five main PSB channels from 35 hours in 2004 to 44 hours in 2008. Viewing in 2006 was at its lowest in the last five years. Viewing of this genre on BBC One has risen year on year, and doubled from 14 hours in 2004 to 30 hours in 2008.
- Share of STV nations/regions News has increased slightly in Scotland since 2004, while in every other region audience share has either fallen or remained static. The overall network share for ITV nations/regions News has therefore decreased slightly from 22% in 2004 to 19% in 2008.

- BBC nations/regions News share has increased in Northern Ireland and Southern England, while it has declined in every other region since 2004. The overall network share for BBC is down slightly from 30% in 2004 to 28% in 2008.
- Share of audiences varies by region, with UTV particularly strong in Northern Ireland and ITV lowest in London. BBC nations/regions News gains a particularly high share of viewing in Wales and a lower share in North East and Border.

Audience impact

- BBC One was the only PSB channel to increase its rating on “*Its programmes help me understand what’s going on in the world today*” in 2008 from 2007. In 2008 it stood out above the other channels in its rating in this area (BBC One 83%, BBC Two 69%, ITV1 67%, Channel 4 55%). Both Five and Channel 4 saw decreases from 2007 to 2008 in the proportion of regular viewers rating them highly on this measure.
- *Trustworthy News* continues to be seen as being particularly well-delivered by BBC One (79%), BBC Two (70%) and ITV1 (68%) by regular viewers of the channels. BBC Three’s and BBC Four’s ratings on how *trustworthy* their news is increased significantly in 2008 from 2006 (50% and 56% respectively in 2008). These increases for the BBC digital channels sit alongside increases in ratings for BBC One, ITV1 and Five.
- BBC News 24/BBC News rated extremely highly on this PSB element.
- Views in the nations about the provision of nations/regions news vary, but the main findings are that:
 - In 2006 in Wales, Northern Ireland and England, regular viewers rated ITV1 and BBC One similarly, but in 2008 BBC One started to edge ahead of ITV1 on this measure.
 - In Scotland in 2006, regular viewers rated ITV1 more positively on this measure than BBC One, but in 2008 there was no significant difference between the ratings of the channels.
- Pulse data from 2008 show that over 80% of responses rated News programmes on each channel as being of high quality. Responses to News programmes on BBC Two and Channel 4 were more likely than other programmes to be the positive responses from their viewers; for over 90% of each channels’ responses, viewers agreed’ that they were of high quality.

Output

Note: The BBC News channel shows only News and Current Affairs programmes and therefore each year the total output of the genres on the channel is 8,760 hours, of which 1643 hours fall in peak time. In 2008, 12% of its output was classified as Current Affairs, with the remaining 88% classified as News. BBC News 24/BBC News is not shown graphically in this section as its dedicated output would distort the picture.

News output

Figure 4.1 shows the volume of UK/national News⁷¹ across the whole day, from 2005 to 2008, on the main PSB channels. Following an 8% decline between 2005 and 2006 (due to a reduction in night-time output, which is shown simultaneously by BBC One or BBC Two and BBC News/BBC News 24), UK/national News output has remained relatively stable over the past three years, increasing by 58 hours or 1% year-on-year in 2008 to 5,438 hours.

Within this overall total, there were small reductions in UK/national News output by BBC One, ITV1 and Five from 2007 to 2008. These decreases were offset by a significant increase (55%) of News volume shown on BBC Two, mainly as a result of the return of a greater number of BBC News/BBC News 24 simulcasts during the night.

Figure 4.1: Volume of hours of UK/national News⁷², all day, 2005-2008

Volume of hours of news output, all day, 2005-2008



Source: Broadcaster returns

Figure 4.2 demonstrates that peak-time UK/national News increased in 2008 by 80 hours from the previous year to reach 901 hours (10% growth). However, this remains lower than in 2005, when 928 hours of peak-time News was broadcast.

ITV1 increased its peak-time UK/national News provision over the four-year period by 76% to 236 hours in 2008, with the re-introduction of *News at Ten* at the beginning of 2008, which came back on air in a regular peak time slot for the first time in nine years. Five also increased hours of News shown in peak time by 22% over the period, due to the lengthening of *Five News*, shown at 7pm, to 30 minutes (which rebranded as *Five News with Natasha Kaplinsky* in February 2008).

⁷¹ UK/national News refers to network news and excludes non-network news (referred to as nations/regions News in this report).

⁷² The BBC amended its classification of News and Current Affairs in 2005, so comparisons of data for the individual genres should not be made pre and post 2005. 2004 data has therefore not been shown within this figure.

However, these increases were offset by a reduction in News output on BBC Three from 135 hours in 2005 to 23 hours in 2006, as the 7 O'clock News bulletin was removed, and by a slight reduction in BBC One's peak-time News output.

Figure 4.2: Volume of hours of UK/national News⁷³, peak time, 2005-2008

Volume of hours of news output, peak hours, 2005-2008



Source: Broadcaster returns

Current Affairs output

Between 2005 and 2008 all-day Current Affairs output increased by 56 hours or 4% to 1,550 hours broadcast (Figure 4.3), although the overall level between 2007 and 2008 remained stable.

BBC One, Five and BBC Three drove this longer-term increase, with the other channels reducing their Current Affairs output over the period. Five increased its volume of Current Affairs by 55% to 398 hours in 2008. However, most of BBC One's and BBC Three's Current Affairs growth, up by 41% and 56% respectively since 2005, was due to repeats (shown during the night hours) rather than first-run programming.

ITV1 made the greatest reduction in Current Affairs programming, down by 51% to 115 hours in 2008 from 233 in 2005. This was the result of fewer Current Affairs programmes being broadcast on Sundays and the disappearance of repeats of *Tonight with Trevor McDonald* in the night-time schedule. There was also a reduction in GMTV's Current Affairs output over this period, which contributed to the decrease.

⁷³ The BBC amended its classification of News and Current Affairs in 2005, so comparisons of data for the individual genres should not be made pre and post 2005. 2004 data has therefore not been shown within this figure.

Figure 4.3: Volume of hours of Current Affairs⁷⁴, all day, 2005-2008

Volume of hours of current affairs output, all day, 2005-2008



Source: Broadcaster returns

Figure 4.4 shows that there has been a very gradual year-on-year decline in peak-time Current Affairs output since 2005, falling by 3% over the period to 473 hours in 2008.

Within this overall total there were only minor changes by channel, with BBC One, ITV1, Five and BBC Three increasing their Current Affairs output and BBC Two, Channel 4 and BBC Four reducing it over the period.

Figure 4.4: Volume of hours of Current Affairs, peak time, 2005-2008

Volume of hours of current affairs output, peak hours, 2005-2008



Source: Broadcaster returns

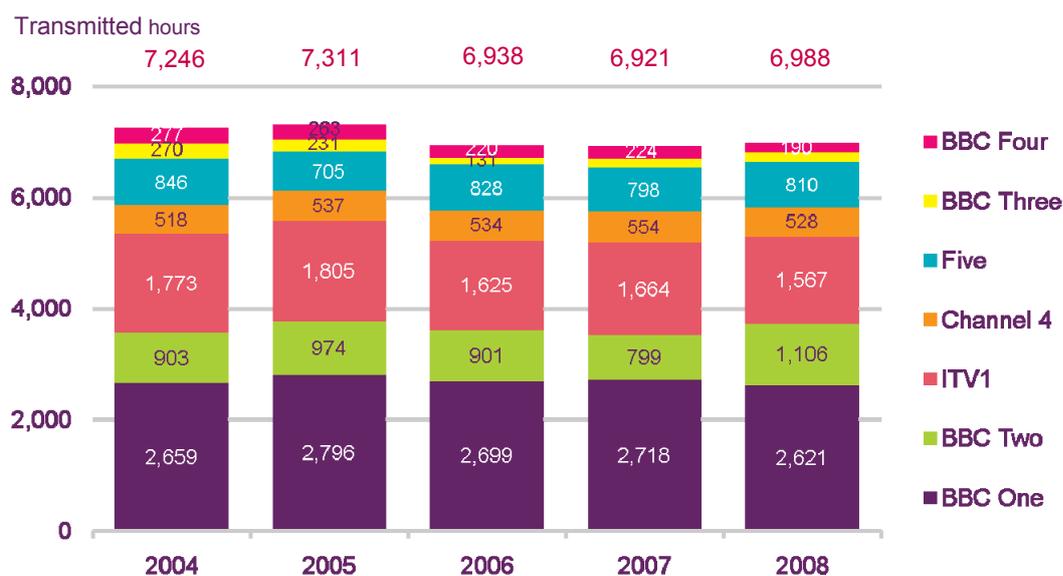
⁷⁴ The BBC amended its classification of News and Current Affairs in 2005, so comparisons of data for the individual genres should not be made pre and post 2005. 2004 data has therefore not been shown within this figure.

News and Current Affairs output combined

Figure 4.5 shows the volume of UK/national News and Current Affairs together across the whole day. It decreased by 4% over the past five years, from 7,246 hours in 2004 to 6,988 hours in 2008, although the level has remained relatively constant since 2006. There have been slight fluctuations for individual channels, however volumes tend to reflect major news events which result in extended News bulletins and extra Current Affairs coverage.

In 2008, BBC Two's schedule contained the highest level of UK/national News and Current Affairs coverage for five years, due to increased News 24 simulcasts during the night time.

Figure 4.5: Volume of News and Current Affairs output, all day, 2004-2008

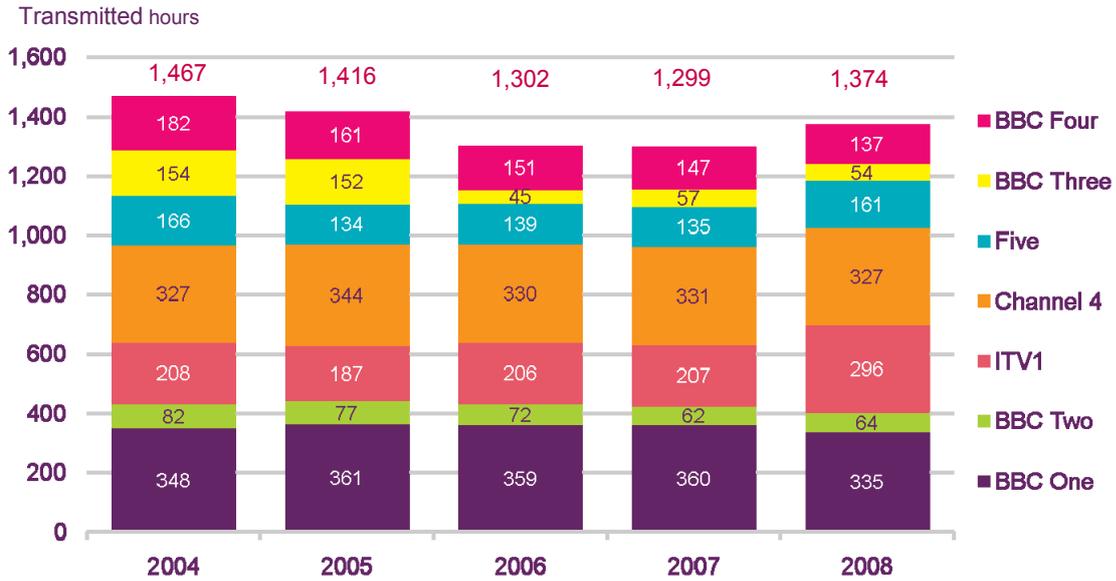


Source: Broadcaster returns

Figure 4.6 gives volumes of News and Current Affairs programmes (taken together) during peak time and shows a gradual decline between 2004 and 2007. Volumes increased slightly in 2008 to 1,374 hours, up from 1,299 hours in 2007.

The increase was driven by ITV1's *News at Ten* returning to its regular peak-time slot at the beginning of 2008. However, the overall News and Current Affairs output in the PSB's peak time schedules was still 6% lower than in 2004, due to reductions in output over the period on most other channels.

Figure 4.6: Volume of hours of UK/national News and Current Affairs output, peak time, 2004-2008



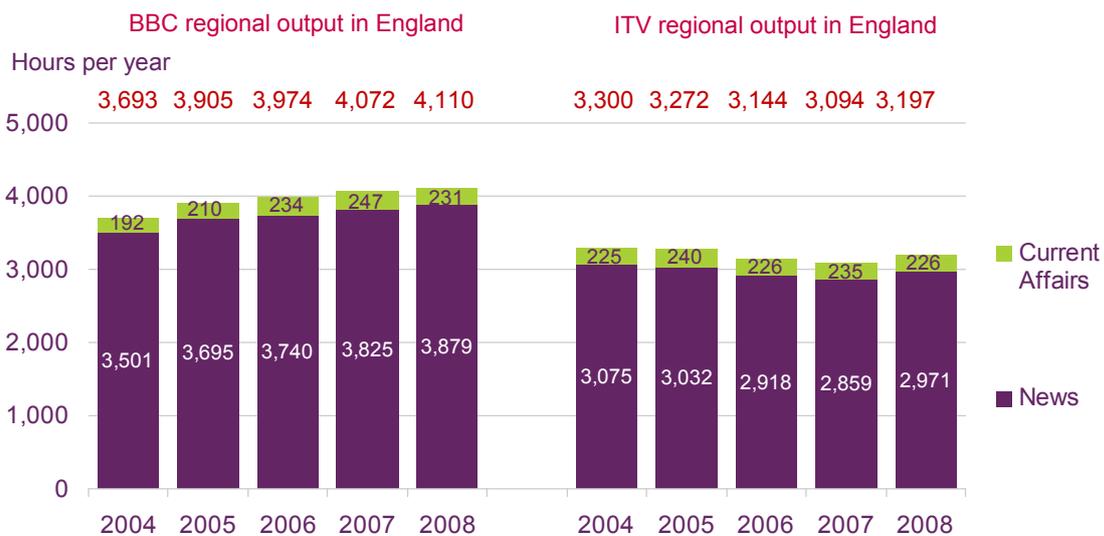
Source: Broadcaster returns

Nations and regions News (or ‘non-network’ News)

Figure 4.7 shows a steady growth in the volume of News and Current Affairs programmes on BBC One and BBC Two in England over the last five years (a growth of 11% or 417 hours over this period).

There was an under-delivery of nations/regions News on ITV in England in 2007 when regional news slots were dropped during the year. After Ofcom’s intervention, they were reinstated and the quotas were met in full in 2008, with a resultant increase in the number of hours broadcast, compared with 2007.

Figure 4.7: Non-network News and Current Affairs in England, 2004-2008

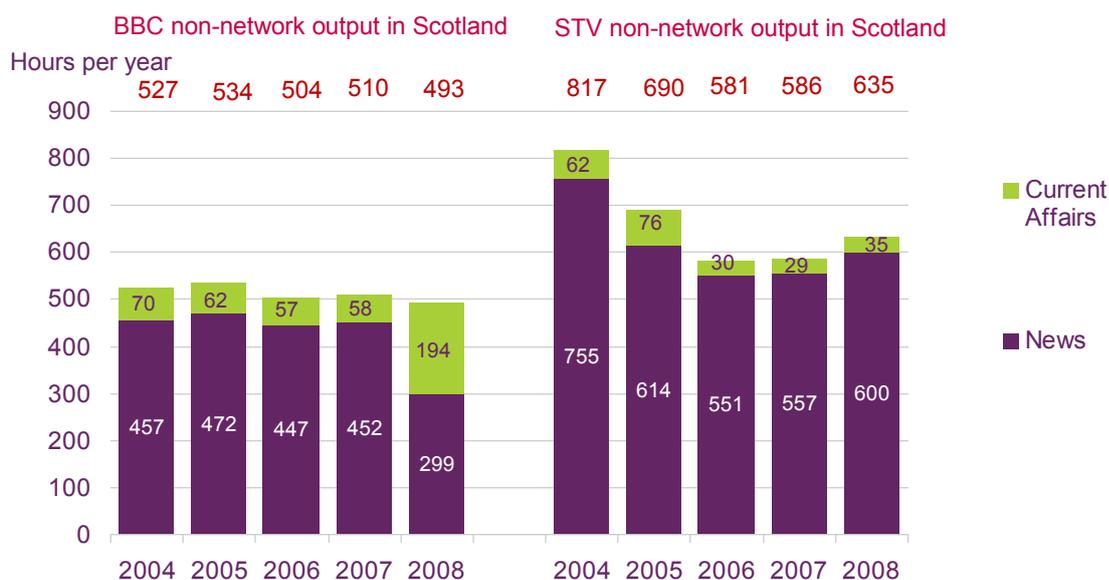


Source: Broadcaster returns
 Figures exclude repeats.

Figure 4.8 shows the levels of output in Scotland. There was a reallocation of BBC programmes between News and Current Affairs in 2008, resulting in an increase of 130 hours of Current Affairs programming and a corresponding reduction in News from 2007. The overall volume of BBC nations/regions News and Current Affairs saw a slight reduction from the previous year (of 3% or 17 hours).

On Channel 3, changes in the quotas for regional output since 2004 have resulted in fewer hours of non-network programmes being broadcast in the STV Central and North regions. However, in 2008 the levels of News and Current Affairs increased slightly, by 49 hours or 8%, although the volume in 2008 (635 hours) was still lower than that broadcast in 2004 (down by 182 hours or 22%).

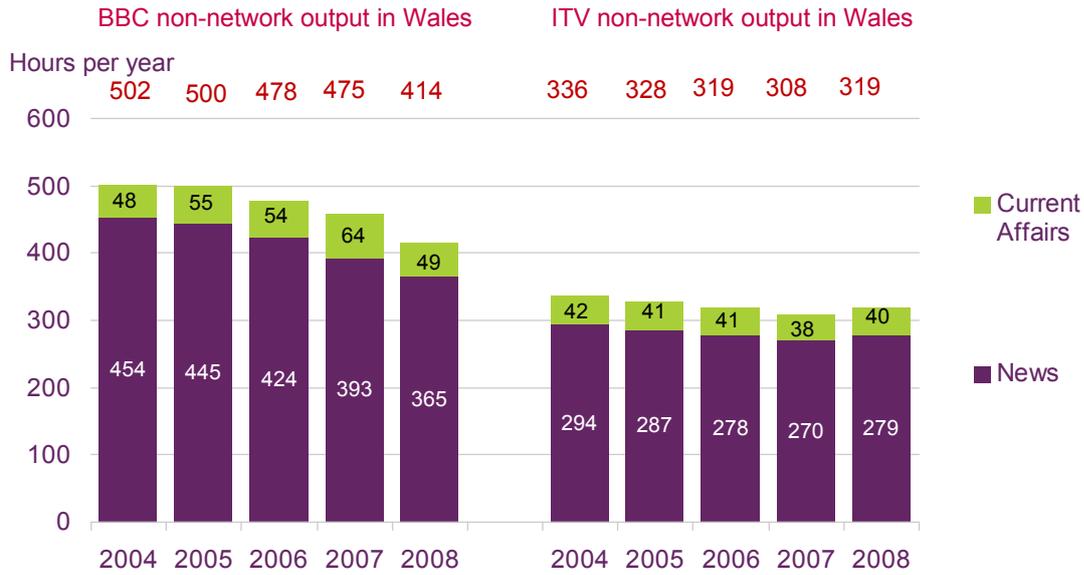
Figure 4.8: Non-network News and Current Affairs in Scotland, 2004-2008



Source: Broadcaster returns
 Note: Figures exclude repeats

In Wales, BBC One and Two have seen reductions in their nations/regions News output year-on-year since 2004 (88 hours or 18%), while volume of the nations Current Affairs has been more stable. The levels of non-network News and Current Affairs output on ITV1 Wales have remained relatively stable in this period. In Wales, the BBC continues to broadcast more non-network News and Current Affairs than ITV Wales.

Figure 4.9: Non-network News and Current Affairs in Wales, 2004-2008

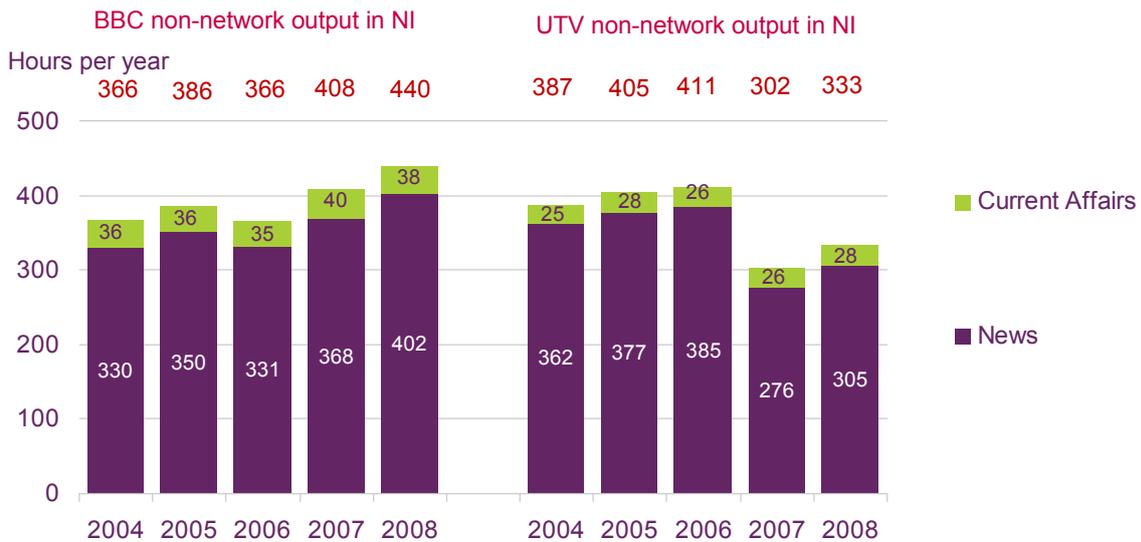


Source: Broadcaster returns
 Note: Figures exclude repeats

In Northern Ireland the BBC and UTV both increased the amount of nations/regions News and Current Affairs broadcast in 2008, compared with 2007; the BBC by 32 hours or 8%, UTV by 31 hours or 10%. The number of hours of Current Affairs programmes shown by the two broadcasters remained relatively stable throughout the period under review.

In both 2007 and 2008 the BBC broadcast a greater number of hours of these two genres than UTV; this had not been the case in the previous three years.

Figure 4.10: Non-network News and Current Affairs in Northern Ireland, 2004-2008



Source: Broadcaster returns
 Note: Figures exclude repeats

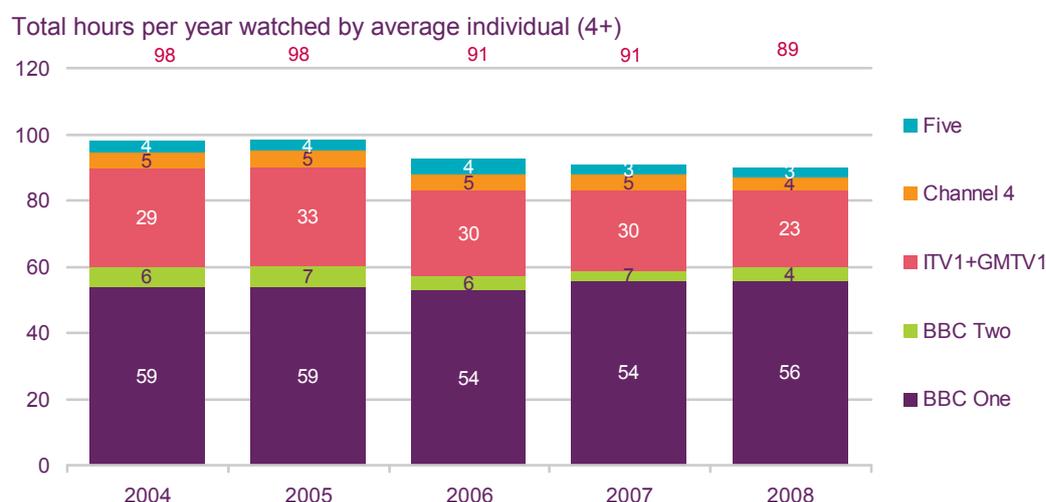
Viewing figures

This section reports on overall hours and proportions of viewing of the News and Current Affairs genres on television.

News and Current Affairs: viewing hours

Figure 4.11 shows the total hours UK/national News viewed per channel across the five main PSB channels. Viewing of UK/national News programming is particularly affected by events at the time, so it is more useful to look at the overall longer-term trend than at year-on-year shifts. Overall, the total hours spent viewing News across the five main PSB channels has declined from 98 hours in 2004 to 89 hours in 2008. In terms of viewing of particular channels in 2008, the largest number of hours spent viewing News was on BBC One (56 hours), followed by ITV1 (23 hours).

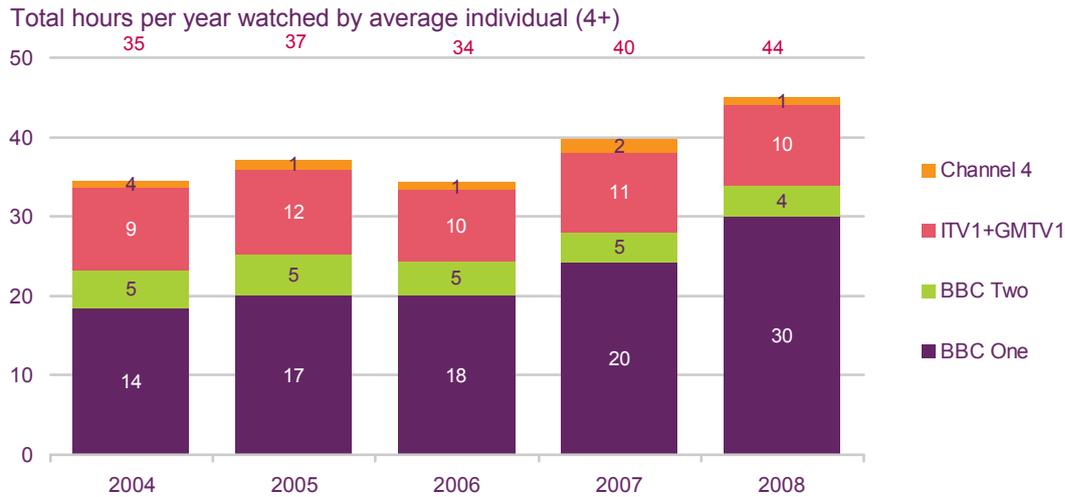
Figure 4.11: Total viewing of UK/national News, all individuals, five main PSB channels only, 2004 - 2008



Source: BARB, 2003-2008

Figure 4.12 shows the average total hours of Current Affairs viewed on the five main PSB channels. Overall hours of viewing of Current Affairs increased from 35 hours in 2004 to 44 hours in 2008. Viewing in 2006 was at its lowest in the last five years. Viewing of this genre on BBC One has risen year on year, and doubled from 14 hours in 2004 to 30 hours in 2008. Viewing of the genre on BBC Two, Channel 4 and ITV1 has remained more stable.

Figure 4.12: Total viewing of Current Affairs, all individuals, main PSB channels only

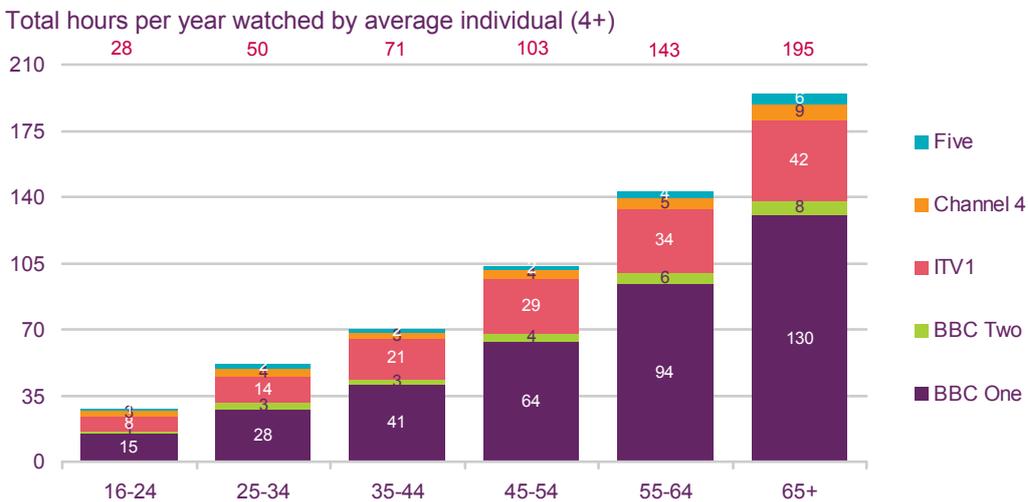


Source: BARB, 2003-2008

News viewing by age and by platform

As illustrated in Figure 4.13, individuals aged 16-24 watched, on average, 28 hours of UK/national news programming in 2008, compared with the oldest age group (65+) who spent 195 hours across the same period. It is important to note that older viewers tend to watch more television overall and so it is expected that they will watch more hours of almost every genre than other groups. However, the difference here is substantial.

Figure 4.13: Total viewing hours of National News, main PSB channels only, by age group, 2008



Source: BARB, 2008

Figure 4.14 shows that viewing by 16-24s of UK/network News (including digital news channels) has declined overall from 46 hours in 2004 to 36 hours in 2008, with an increase in 2007. Viewing on BBC One, ITV1, Channel 4 and Five has declined, with ITV1 declining the most. While some of this loss of viewing on the terrestrial channels can be due to viewing on the digital News channels instead, there is still an overall reduction in viewing.

Figure 4.14: Total hours of News viewing, by broadcaster, 2004 – 2008: 16-24s

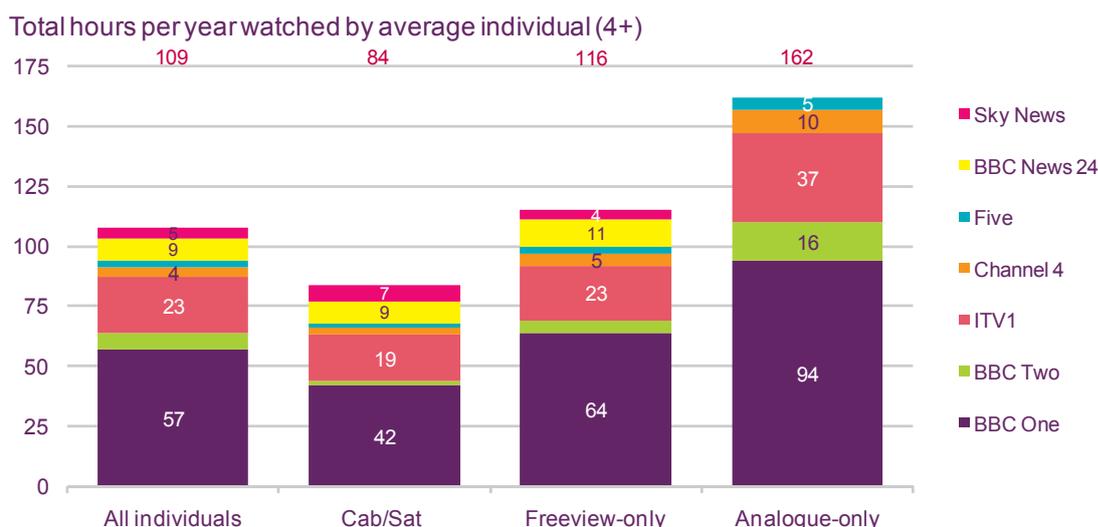


Source: BARB 2004 – 2008, network plus

Figure 4.15 shows News viewing by platform and identifies that News viewing varies depending on the type of television platform owned. While an average of 109 hours of News was watched across all channels for all individuals (including digital News channels) this decreased to 84 hours among those with access to cable or satellite and increased to 116 hours among those with Freeview only. Among those with terrestrial-only access, 162 hours was spent on News viewing, although it is important to note that the profile of the terrestrial-only platform is skewed towards older people, who in turn watch considerably more News programming overall.

Note: The figures for cable/satellite and for Freeview include viewing of Sky News and BBC News/BBC News 24.

Figure 4.15: Split in total viewing hours of national and UK 24-hour News, by platform



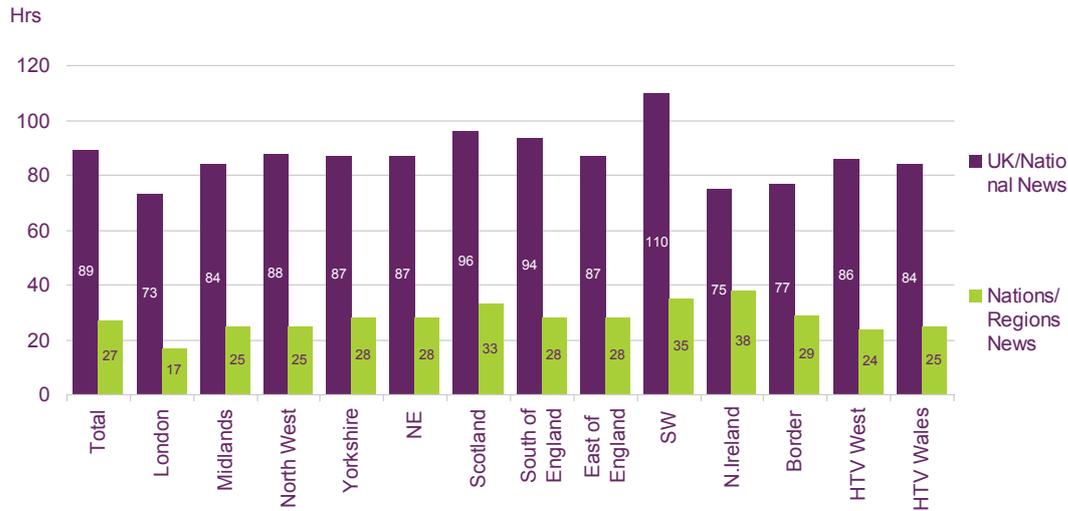
Source: BARB 2008

Figure 4.17 looks at the average hours per individual spent viewing UK/national News in 2008 compared to nations/regions News, split by nation and region. It appears that individuals in the South West, Scotland and Meridian were above average in terms of hours spent viewing UK/national news programming. Individuals in Northern Ireland watched the

greatest amount of nations/regions news, followed by the South West and then Scotland. Individuals in London consume the lowest amount of both nations/regions News and UK/national News.

Note: Within this analysis, News on S4C is included within the data on the UK/national news. In addition, the demographic profile of London is substantially younger than some of the other regions and has a higher proportion of minority ethnic groups; both of these groups consume less television News. Therefore it is likely that the demographics of these regions are influencing the consumption figures.

Figure 4.17: Total hours of viewing of BBC/Channel 3 nations/regions news versus UK/national News by nations and regions, 2008



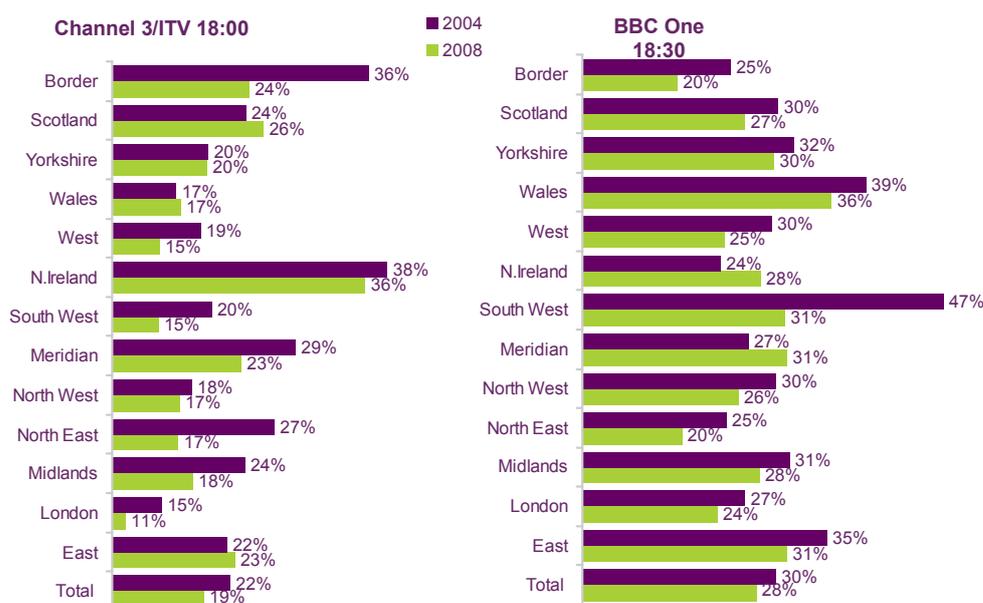
Source: BARB

Figure 4.18 shows Channel 3 and BBC One evening nations/regions News programmes' share of viewing in 2008, compared to 2004, split by region. Share of audiences varies by region, with UTV particularly strong in Northern Ireland and ITV lowest in London. BBC nations/regions News gains a particularly high share of viewing in Wales and a lower share in North East and Border.

Looking at the change in share figures from 2004 to 2008, share of Channel 3 nations/regions News has increased slightly in Scotland, while in every other region audience share has either fallen or remained static. The overall network figure for ITV nations/regions News has therefore decreased slightly from 22% in 2004 to 19% in 2008.

BBC nations/regions News share has increased in Northern Ireland and Meridian, while it has declined in every other region. The overall network figure for BBC is down slightly, from 30% in 2004 to 28% in 2008.

Figure 4.18: Channel 3 and BBC One nations/regions News: viewing share 2004-2008



Source: BARB
 Note: ITV regions are used for this analysis, and so BBC One share does not correlate exactly with distinct BBC regional news programmes

Audience impact

This section focuses on viewers’ opinions towards the channels’ delivery of PSB purpose 1, which relates directly to the News and Current Affairs genres⁷⁵.

The PSB Tracker survey asked respondents to consider the following statements, which provide an indication of what audiences think of PSB broadcasters’ delivery of purpose 1:

“Its programmes help me understand what’s going on in the world today”

“Its news programmes are trustworthy”

“Its news programmes for people in (nation) provide a wide range of good quality news about (nation)” (asked in the devolved nations)”⁷⁶

“Its Regional News programmes provide a wide range of good quality news about my area” (asked in England)

Note: Analysis of these statements related to News is carried out among regular viewers of the channel, but regular viewers of the channel do not necessarily watch the channel for its News provision. It is not possible within the PSB Tracker data to analyse the data by news viewers on each channel.

The two statements asked about nations/regions News are asked only in relation to BBC One and ITV1/Channel 3, rather than all PSB channels.

⁷⁵ BBC News 24 was added to the PSB Tracker research in April 2007 and these data have been added to this section.

⁷⁶ Before July 08 this statement was ask to all as ‘Its Regional News programmes provide a wide range of good quality news about my area’ but was changed for greater clarity for those in the devolved nations.

Audience opinion on BBC News (formerly BBC News 24) is included within this section. This channel specialises in the delivery of News and therefore attracts viewers who are particularly interested in News. This is likely to underpin the strong response to BBC News/BBC News 24 in comparison to the other more general PSB channels.

Informing our understanding of the world

Figure 4.19 below shows how regular viewers of each of the PSB channels judged their experience of *gaining understanding of the world today* from watching that channel’s output by rating the extent to which the following statement applied to the channel.

“Its programmes help me understand what’s going on in the world today”

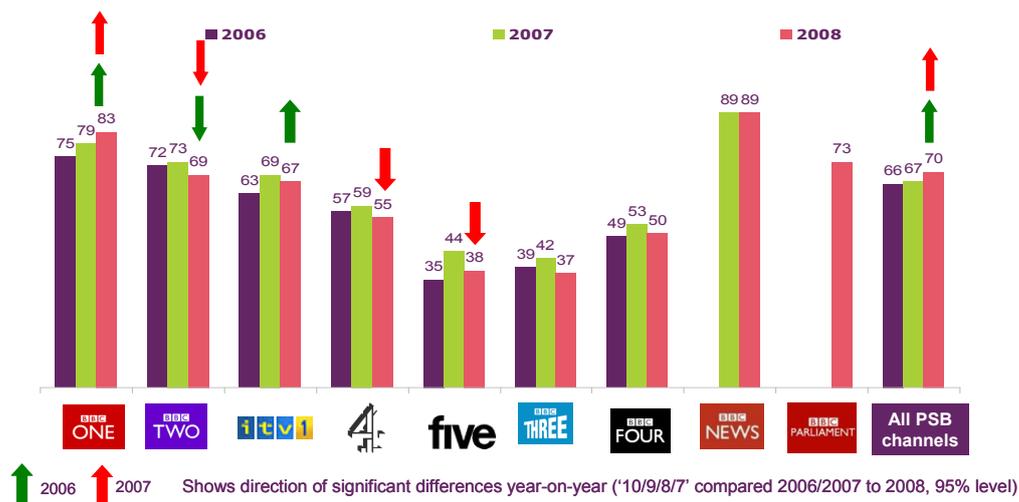
Over 8 in 10 regular viewers of BBC One rated the channel between 7 and 10 out of 10 on the statement “*Its programmes help me understand what’s going on in the world today*” in 2008. BBC One was the only PSB channel to increase its rating since 2007, and now stands above the other channels in its rating in this area.

Ratings were lower among regular viewers of BBC Two (69%), ITV1 (67%) and Channel 4 (55%), but the majority of their viewers still rated them highly on this function. Five was rated less highly, with around two-fifths (38%) of its regular viewers rating it highly on this. BBC Two, Five and Channel 4 saw decreases from 2007 to 2008 in the proportion of regular viewers rating them highly on this measure.

Perhaps unsurprisingly, given the nature of the channel, BBC News/BBC News 24 rated extremely highly on this PSB element, with 89% of regular viewers saying that programmes on this channel *helped them understand what was going on in the world*.

Figure 4.19: Opinions of purpose 1 – informing our understanding of the world

Its programmes help me understand what’s going on in the world today
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798
Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4906, 4850, BBC2 = 2420, 2360, 2334, ITV1 = 4027, 3669, 3587, Channel 4 = 2746, 2473, 2339, five = 1424, 1384, 1262, BBC3 = 481, 469, 541, BBC4 = 247, 284, 317, BBC News = 796, 1507, BBC Parliament = 52* *Very small base size – indicative only.
Source: Ofcom PSB Tracker, GfK NOP

We analysed the profile of regular viewers who rated the individual channels highly on this element of PSB. This analysis allows us to make comparisons between channels, to identify which channels gained a higher proportion of those rating the channel highly falling in different demographic groups. Note: the actual proportion of the general population who rated the channels highly differs by channel and is not taken into account in this analysis.

This shows that those who positively rated BBC News, and to a lesser extent BBC Two, on *helping them understand what was going on in the world* were more likely to be men than those who rated the other channels highly on this measure (BBC News 56% were men, BBC Two 51%).

Those who rated Channel 4 and BBC Three highly on this element were more likely to be aged 16 – 34 than those rating BBC One, BBC Two, ITV1, Five and BBC News highly (Channel 4 42% were 16-24, BBC Three 46%, BBC One 29%, BBC Two 20%, ITV1 29%, Five 26%, BBC News 25%). Those rating BBC Two highly on this were more likely than the other channels to be aged 55 or older (46% were 55 years old or more).

Those who rated BBC One, BBC Two and Channel 4 highly on *helping them understand what was going on in the world* were more likely to be in the AB socio-economic groups than those rating ITV1 and Five positively (BBC One 20%, BBC Two 23%, Channel 4 21%, ITV1 15%, Five 9%).

Among those rating the channels highly on this measure, Five has a higher proportion of people from an ethnic minority group (8%) than BBC One (5%), BBC Two (4%) and ITV1 (4%). Those who rated Channel 4 and BBC One highly on this were more likely to be from an ethnic minority group than those who rated BBC Two highly (Channel 4 6%, BBC One 5%, BBC Two 4%)

News programmes are trustworthy

Figure 4.20 shows how regular viewers of each of the PSB channels felt about the *trustworthiness* of News provision, by rating the extent to which the following statement applied to each channel's News output.

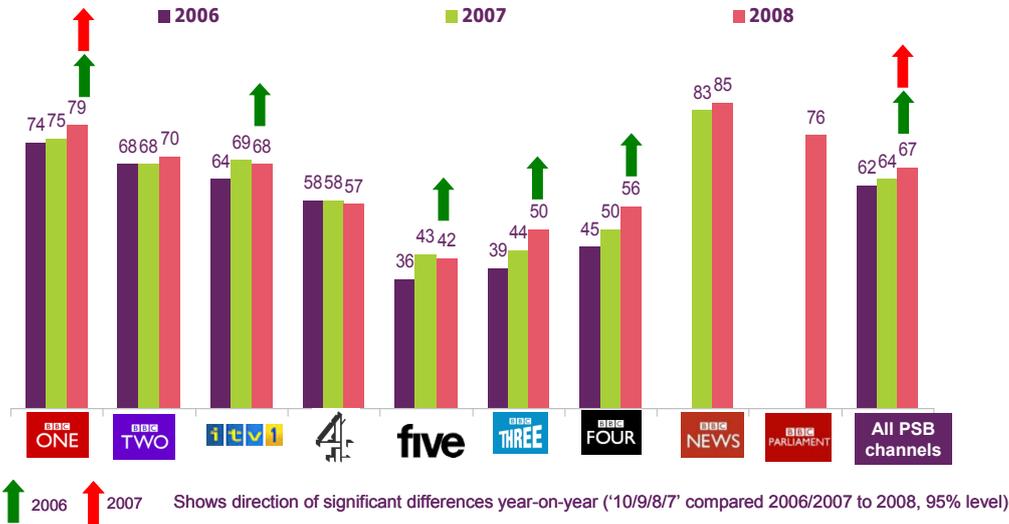
"Its news programmes are trustworthy"

News continues to be seen as *trustworthy* by regular viewers of BBC One (79%), BBC Two (70%) and ITV1 (68%) as being particularly *well-delivered* on these channels. Channel 4 and Five rate 57% and 42% respectively, with both achieving higher levels of 'don't knows' than the other main channels, possibly because some of their regular viewers do not use these channels for News.

BBC Three's and BBC Four's ratings on the *trustworthiness* of their news has increased significantly since 2006 (to 50% and 56% respectively in 2008). These increases for the BBC digital channels sit alongside increases in ratings for BBC One, ITV1 and Five.

Figure 4.20: Opinions of purpose 1 – News programmes are trustworthy

Its news programmes are trustworthy
 Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317, BBC News = 796, 1507, BBC Parliament = 52* *Very small base size – indicative only.
 Source: Ofcom PSB Tracker, GfK NOP

Sub-group analysis on the profile of regular viewers who rated the individual channels highly on *the trustworthiness of the news* identifies similar sub-group patterns to those reported for *programmes helping viewers to understand what is going on in the world today* (see earlier in this section for more detail).

“Its news programmes for people in (nation) provide a wide range of good quality news about (nation)”

Only the BBC and ITV/Channel 3 show nations/regions News programmes, and therefore Figures 4.21 to 4.25 show results for these channels only. The data are reported separately for the devolved nations, to give an individual picture for each nation.

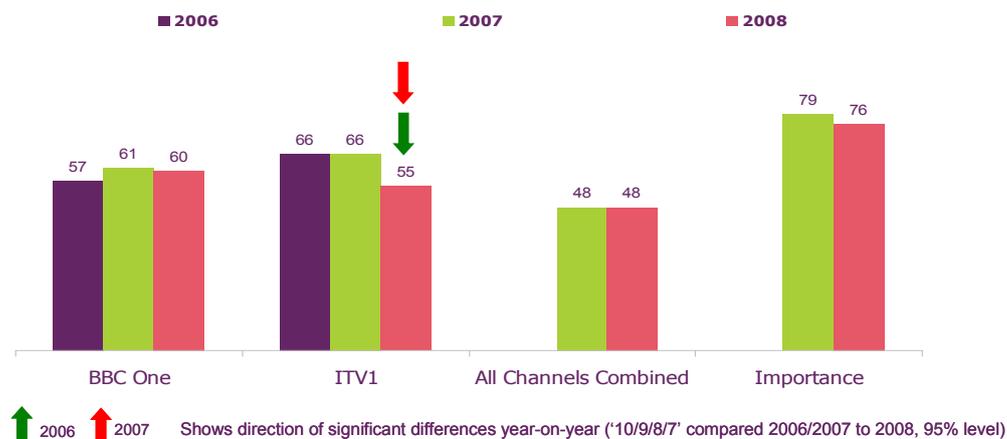
Figure 4.21 shows the opinions of viewers in Scotland on the delivery of nations News. This identifies that regular viewers of ITV1⁷⁷ in 2008 did not rate the channel as highly as in previous years on *having a wide range of good quality news about Scotland* (55% in 2008 in comparison to 65% in 2007). In 2006, ITV1 was rated more positively on this measure by its regular viewers than BBC One was by its regular viewers, but in 2008 this was not the case.

⁷⁷ Within the PSB Tracker, Channel 3 is more simply referred to as ITV1 for all respondents in all nations. Note: within Scotland Channel 3 is STV.

Figure 4.21: Opinions on purpose 1 : nations News programmes in Scotland

Its news programmes for people in Scotland provide a wide range of good quality news about Scotland

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined' = all respondents in Scotland who ever watch any PSB channels: 1022, 997

Base for importance: 772, 499 (half sample for Q1 and Q4 of 2007 and half sample for all of 2008)

Base for individual channels: Self-reported regular viewers of each channel in Scotland BBC1 = 757, 698, 687 ITV1 = 599, 534, 508

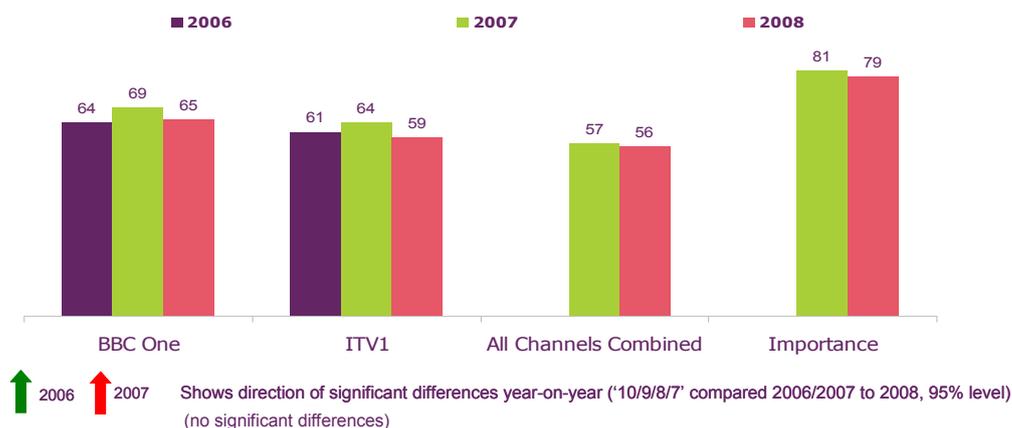
NB Before July 08 this statement was asked to all as 'Its regional news programmes provide a wide range of good quality news about my area' but was changed for greater clarity for those in the devolved nations. Source: Ofcom PSB Tracker, GfK NOP

The opinions of viewers in Wales on the delivery of nations News is shown in Figure 4.22. In 2006 ITV1⁷⁸ and BBC One were rated similarly by their respective regular viewers, but in 2008 BBC One started to be rated more positively than ITV1 on this measure. This figure also shows opinions about nations News delivery, by all the PSB channels taken together; a little over half (56%) of those in Wales continue to rate the channels, taken together, as delivering this well.

Figure 4.22: Opinions on purpose 1 : nations News programmes in Wales

Its news programmes for people in Wales provide a wide range of good quality news about Wales

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined' = all respondents in Wales who ever watch any of the nine channels : 1006, 975

Base for importance: 752, 488 (half sample for Q1 and Q4 of 2007 and half sample for all of 2008)

Base for individual channels: Self-reported regular viewers of each channel in Wales BBC1 = 791, 744, 741 ITV1 = 616, 568, 596

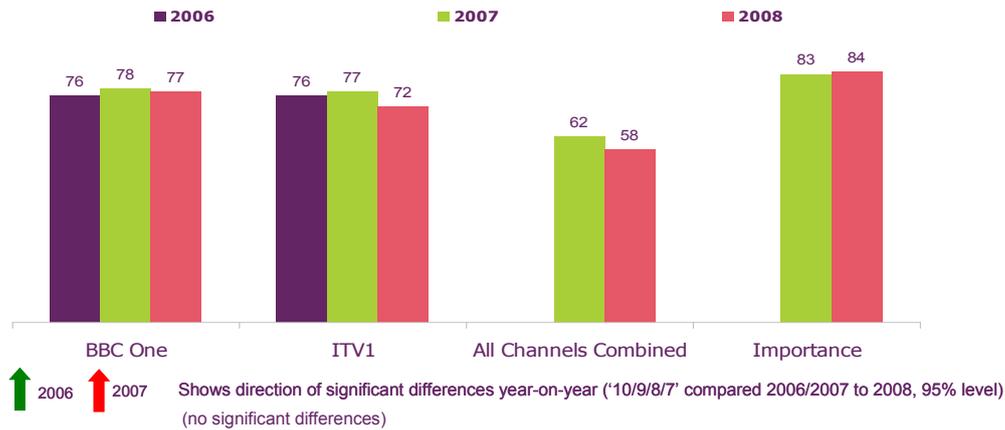
NB Before July 08 this statement was asked to all as 'Its regional news programmes provide a wide range of good quality news about my area' but was changed for greater clarity for those in the devolved nations. Source: Ofcom PSB Tracker, GfK NOP

⁷⁸ Within the PSB Tracker, Channel 3 is more simply referred to as ITV1 for all respondents in all nations. Note: within Wales Channel 3 is ITV1 Wales.

The opinions of viewers in Northern Ireland on the delivery of nations News is shown in Figure 4.23. In previous years ITV1⁷⁹ and BBC One were rated similarly by their respective regular viewers, but in 2008 BBC One started to edge ahead of ITV1 on this measure. Over half (58%) rate the channels together as delivering this element of purpose 1 well.

Figure 4.23: Opinions on purpose 1 : nations News programmes in Northern Ireland

Its news programmes for people in Northern Ireland provide a wide range of good quality news about Northern Ireland
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined' = all respondents in Northern Ireland who ever watch any PSB channels : 1015, 976
Base for importance: 748, 483 (Half sample for Q1 and Q4 2007 and half sample for all of 2008)
Base for individual channels: Self-reported regular viewers of each channel in Northern Ireland BBC1 = 703, 683, 663 ITV1 = 647, 583, 542
NB Before July 08 this statement was asked to all as 'Its regional news programmes provide a wide range of good quality news about my area' but was changed for greater clarity for those in the devolved nations. Source: Ofcom PSB Tracker, GfK NOP

“Its regional News programmes provide a wide range of good quality news about my area (asked in England)”

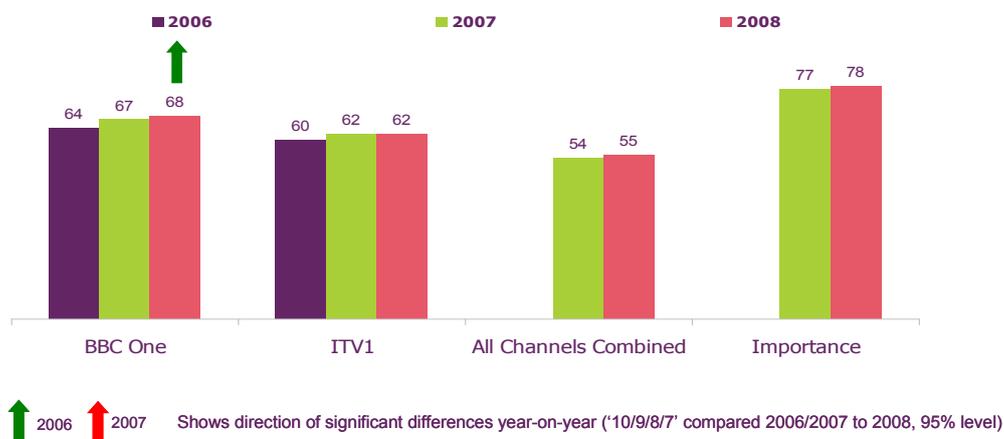
Figure 4.24 shows the opinions of viewers in England on the delivery of regional News. More regular viewers of BBC One rated the channel highly in 2008 than in 2006 (64% vs. 68%). In 2008, fewer of ITV1’s regular viewers rated the channel as delivering a *wide range of good quality regional News* (62%) than BBC One’s regular viewers (68%); this had not been the case in 2006. In comparison to 2006, more regular viewers of BBC One in 2008 rated the channel highly in 2008 (64% vs. 68%).

⁷⁹ Within the PSB Tracker, Channel 3 is more simply referred to as ITV1 for all respondents in all nations. Note: within Northern Ireland Channel 3 is UTV.

Figure 4.24: Opinions on purpose 1 : regional News programmes in England

Its regional news programmes provide a wide range of good quality news about my area (in England)

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents in England who ever watch any PSB channels = 4062, 3850

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 2969, 2813, 2759 ITV1 = 2165, 2039, 1941 (those in England only). Importance (split sample): 2007 half sample Q1 and Q4 (3085) and half sample for all of 2008 (1933)

Source: Ofcom PSB Tracker, Gfk NOP

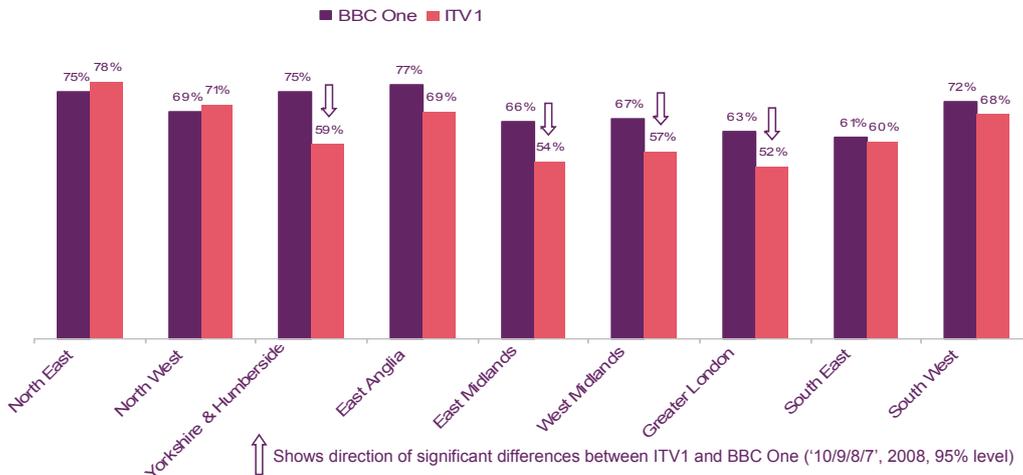
While Figure 4.25 shows the overall opinions of viewers in England on the delivery of regional News over time, figure 4.25 shows the picture for 2008 split by English region⁸⁰. This shows that across a number of regions, BBC One regional News tends to be rated higher than ITV1 regional News by regular viewers of the channels; this includes Yorkshire and Humberside (75% vs. 59%), East Midlands (66% vs. 54%), West Midlands (67% vs 57%) and Greater London (63% vs. 52%).

⁸⁰ Regions within the PSB Tracker are based on the government standard regions (GSR).

Figure 4.25: Delivery of nations News in English regions, 2008

Its regional news programmes provide a wide range of good quality news about my area

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base = Self-reported regular viewers of each channel within the English regions: North East:164, 136; North West: 371,295; Yorkshire and Humberside: 276,221; East Anglia: 140, 88*; East Midlands:224,172; West Midlands:290,210; Greater London: 378,233; South East:613, 384; South West:303,202. Amalgamated data (Jan 08, April 08, July 08, Oct 08). NB In devolved nations, the nation/nations news was asked about, where as in England the respondents region/regional news was asked about after Q308.

Source: Ofcom PSB Tracker, GfK NOP

(*base size under 50, ** base size under 100)

Assessment of Pulse survey data for purpose 1

In the BBC-GfK Pulse survey⁸¹, respondents were asked to rate specific programmes they had viewed recently on a series of statements that relate directly to PSB purpose 1⁸²:

“How trustworthy did you think this programme was?”

“How impartial did you think this programme was?”

“This was a high quality programme”

Responses to these programme-specific questions were then aggregated by genre in order to provide an insight into channel delivery on these statements by genre. One viewer may therefore be giving opinions on more than one programme if they have watched more than one programme of this type. It should be noted that respondents who participated in the Pulse survey rated programmes which they had themselves chosen to watch, and so high levels of agreement with these statements may be expected.

Pulse data from 2008⁸³ are reported here on the perceived quality of News among viewers of programmes transmitted by each channel (see Figure 4.26). This shows that over 80% of

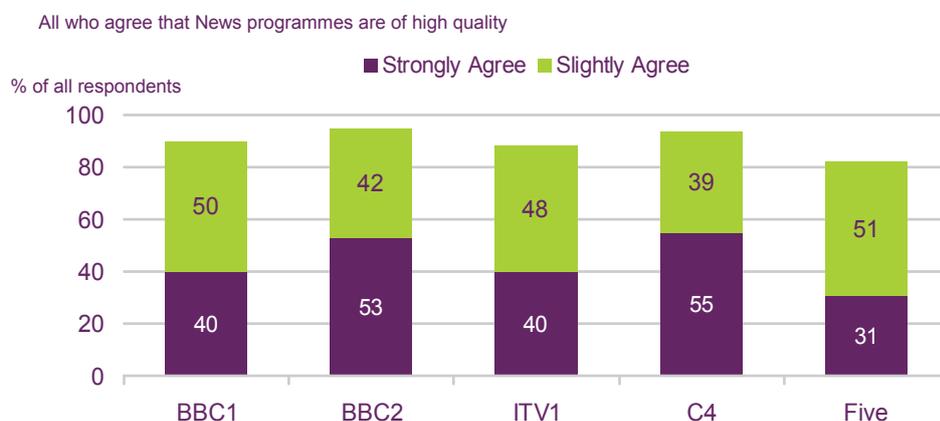
⁸¹ The Pulse survey is a BBC-GfK online, nationally-representative panel of over 19,000 viewers that collects responses on programmes that were viewed on the previous day.

⁸² Statements about trustworthiness and impartiality are only asked about programmes classified as News.

⁸³ In the Pulse survey, programmes are aggregated by genre lists in accordance with Broadcasting Dataservices' (BDS) classifications. This differs from BARB and broadcaster returns' genre classification. Initially therefore genres are not directly comparable. In previous PSB Annual Reports the BDS Specialist Factual genre was amended by Ofcom to more closely fit the BARB and broadcaster returns' classifications. However, for the analysis of 2008 Pulse data GfK NOP worked to

all viewer responses for all News programmes rated on each channel were seen to be of high quality (strongly agree or slightly agree). News programmes on BBC Two and Channel 4 were more likely than other programmes to gain the strongest positive response from their viewers; for over 90% of each channel's programmes, viewers agreed that they were of high quality.

Figure 4.26: Pulse survey opinions – quality of News



Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All News programmes
 Base: BBC1 233879, BBC2 8251, ITV1 43969, C4 10019, Five 2944

Viewers of News programmes were asked as part of the Pulse survey whether they agreed that the News programmes they had watched were impartial, and also how trustworthy they were. Levels of agreement with both were high, with at least nine in ten responses on programmes on each channel agreeing that they were either very, or fairly, impartial (eight in ten in the case of Five) and either very, or fairly, trustworthy. On both measures Channel 4's responses were most likely to be very trustworthy (46%) and very impartial (40%).

overlay the BARB genre classifications onto the Pulse data to give data that is as comparable as possible with the other data sources reported within this report. Therefore within this report, the Figures showing Pulse data analysis by genres show 2008 data only.

Section 5

PSB purpose 2: *stimulating knowledge and learning*

Introduction

This chapter examines in detail PSB purpose 2, which focuses on informal learning across a range of programming. Purpose 2 is defined as:

To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning

This PSB purpose specifically relates to encouraging interest and learning through arts and science programmes. Broadcasters may also consider that other types of programmes play a part in the delivery of this purpose. However, for practical purposes, throughout this section the most relevant genres are taken to be Factual (broken down into Specialist Factual, Factual Entertainment and Other Factual), Arts, Music, Education and Religious programming.

PSB broadcasters do not have any specific quotas to achieve in relation to purpose 2, although the BBC has stated that it is keen to encourage such informal learning across its programmes. In addition, Channel 4 has a remit requirement to contribute to educational and educative programming.

In this section we focus on the five main PSB channels, plus BBC Three and BBC Four.

Purpose 2 was another audience priority area highlighted in the *Second Review of Public Service Broadcasting*. In particular, Serious Factual (or Specialist Factual) was highlighted as an important aspect of PSB that was under threat without further investment from the PSB broadcasters.

Summary findings

Output

- There was an overall increase in volume of Factual output across the five main PSB channels and BBC Three and BBC Four over the last five years, and since 2007 in particular.
- Increases in the last 3 years were driven mainly by a large rise in the volume of **Other Factual** programming (an increase of 1,686 hours or 52% since 2006), although both **Specialist Factual** and **Factual Entertainment** increased (by 153 hours/4% and 221 hours/7% respectively over this period).
 - Five showed the largest increase in Specialist Factual from 2006 to 2008 (by 453 hours or 84%). This consisted mainly of repeats of natural history and other documentaries, and in 2008 the channel had a greater volume of this type of output than any other PSB channel. The BBC's contribution to Specialist Factual decreased from 2,961 hours in 2006 to 2,743 hours in 2008, a decrease of 218 hours or 7%.

- ITV1 had the largest increase in Other Factual programming since 2006 (by 988 hours or 65%) and increases were also seen for BBC One (290 hours or 72%), Channel 4 (333 hours or 90%), Five (86 hours or 40%) and BBC Three (39 hours or 16%).
- Increases in Factual Entertainment were driven by BBC Two (by 255 hours or 60%), Five (53 hours or 41%) and BBC Three (256 hours or 42%).
- In peak time, first-run Specialist Factual output reached 990 hours in 2008; an increase of 10% from 902 hours in 2004, and an increase of 5% from 940 hours in 2007. This rise was driven mainly by increases on Five; over half of these hours fell into the Other Documentary sub-genre and included programmes such as *Animal Rescue Squad* and *Highland Emergency*. Peak-time first-run Specialist Factual output across BBC One, BBC Two, BBC Three and BBC Four combined decreased from 588 hours in 2004 to 464 hours in 2008, a decrease of 21%.
- Since 2004, Arts and Classical Music output has fallen by 19% (370 hours) across the whole day, although there was a 7% increase from 2007 to 2008, due to the largest contributor in this genre, BBC Four, slightly increasing its output year-on-year.
- Hours of Formal Education programmes continued to decrease in 2008 (from 2,705 in 2004 to 1,273 in 2008). However, hours of Learning Support increased over the last three years up to 2,195 hours in 2008, with ITV1 showing the largest increase.
- The overall volume of Religious programming across the whole day has been declining since 2004, although this decline has somewhat stabilised in 2008, with a smaller reduction of 8 hours, or 3%.

Viewing

- Over the past five years the total hours the average individual spent viewing both Other Factual and Specialist Factual has declined: Specialist Factual from 24 hours per year to 19 hours, and Other Factual from 144 hours to 130 hours.
- Until 2007, most viewing of Other Factual was on Channel 4, but in 2008 slightly more hours of viewing of this genre was on BBC Two.
- There has also been a decrease in average hours of viewing on the main five PSB channels in 2008 from 2004, for:
 - Music: 2004 8.2 hours, 2008 3.9 hours (although BBC Two has increased its viewing over this period).
 - Arts: 2004 3.3 hours, 2008 1.9 hours
 - Education: 2004 2.3 hours, 2008 0.7 hours
 - Religion: 2004 3.5 hours, 2008 2.7 hours

Audience impact

- There was an increase in 2008 in the number of regular viewers of the majority of channels that rate these highly on *increasing viewers' interest in particular subjects*. In particular, Channel 4 and BBC Four experienced the largest increases on this measure (6% and 13%).

- Increased ratings among BBC Four's regular viewers mean that 7 in 10 of these now rate the channel highly on *their interesting programmes about history science or the arts*. Nearly 8 in 10 of BBC Two's regular viewers rate the channel highly on this.
- Pulse data show that, of all responses to programmes for each of the main five PSB channels, BBC Two (75%), BBC One (62%) and Five (60%) have the highest proportion that viewers who said *they learnt something from this programme*. Reflecting the origin of the channel's output, of the responses to Five's programmes that this applied to, only 54% were UK-originated, whereas this proportion was over 90% for all other channels.
- Pulse data also indicate that over 8 in 10 responses to Specialist Factual programmes on all the five main PSB channels agreed that they *learnt something from the programme*. Responses about BBC One's (79%), BBC Two's (74%) and ITV1's (73%) Specialist Factual programmes were more likely to indicate that these programmes were *inspiring* than Channel 4's (62%) and Five's (59%) Specialist Factual programmes.

Output hours

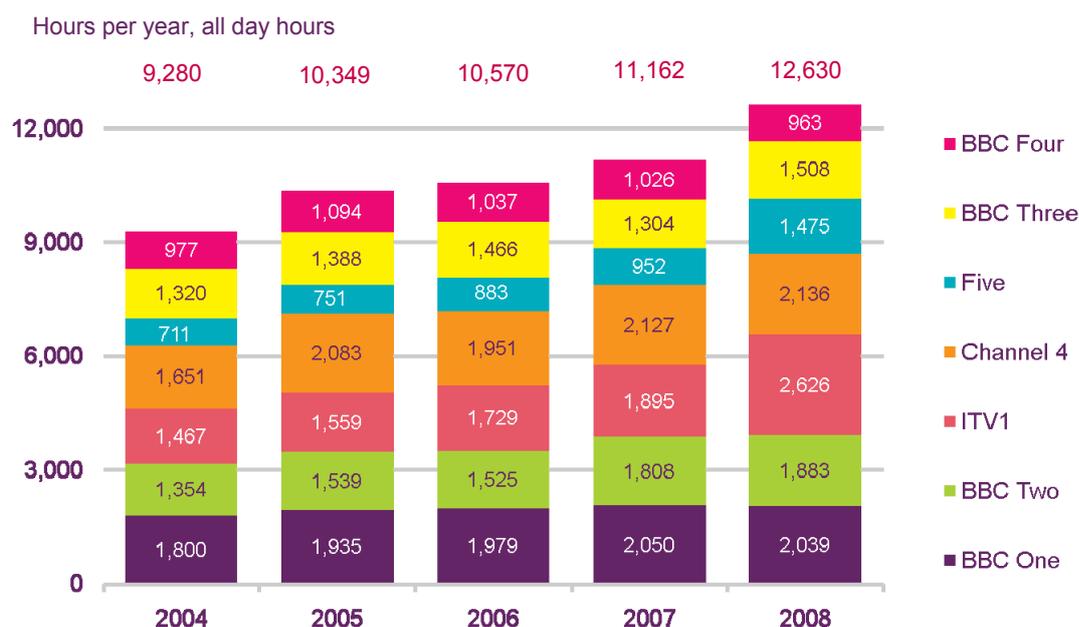
Factual

The Factual genre encompasses a broad category of programmes, which range from Specialist Factual material such as Nature & Wildlife, History, Science & Technology and Other Documentary, to lighter Factual output such as Magazines, Leisure & Hobbies and Factual Entertainment.

Overall Factual output increased year-on-year, up by 36% from 9,280 hours in 2004 to 12,630 hours broadcast in 2008 (Figure 5.1). All PSB channels increased Factual volume, apart from BBC Four which decreased very slightly from 977 hours to 963 hours over the period. The biggest change in Factual output was on Five (107% growth since 2004) due to an increase in Specialist Factual output and on ITV1 (79% growth), resulting from an increase in General Factual programming.

From 2007, there was an increase of 13% in the volume of Factual output across the five main PSB channels and BBC Three and BBC Four, from 11,162 hours in 2007 to 12,630 hours in 2008.

Figure 5.1: Factual output 2004 – 2008, all day



Source: Broadcaster returns

In 2006 a new set of genre definitions was introduced which identified component genres within the main Factual genre. It is not possible to re-categorise pre-2006 data and therefore we cannot compare all the component parts of the genre across the full five years under review. However, such an analysis is possible for the latest three years, and is included in the relevant figures in this section.

Figure 5.2 compares the three main categories of Factual programming between 2006 and 2008. Over the past three years the Other Factual sub-genre (which includes magazine-style and 'General Factual' programmes) has experienced strong growth, increasing by 52% from 3,214 hours in 2006 to 4,900 hours in 2008. ITV1 in particular has driven this growth, largely as a result of changes in the late-night hours, with the rise in General Factual output due to the increase in ITV *Nightscreen* hours and the introduction of *Nightwatch* with Steve Scott in 2008.

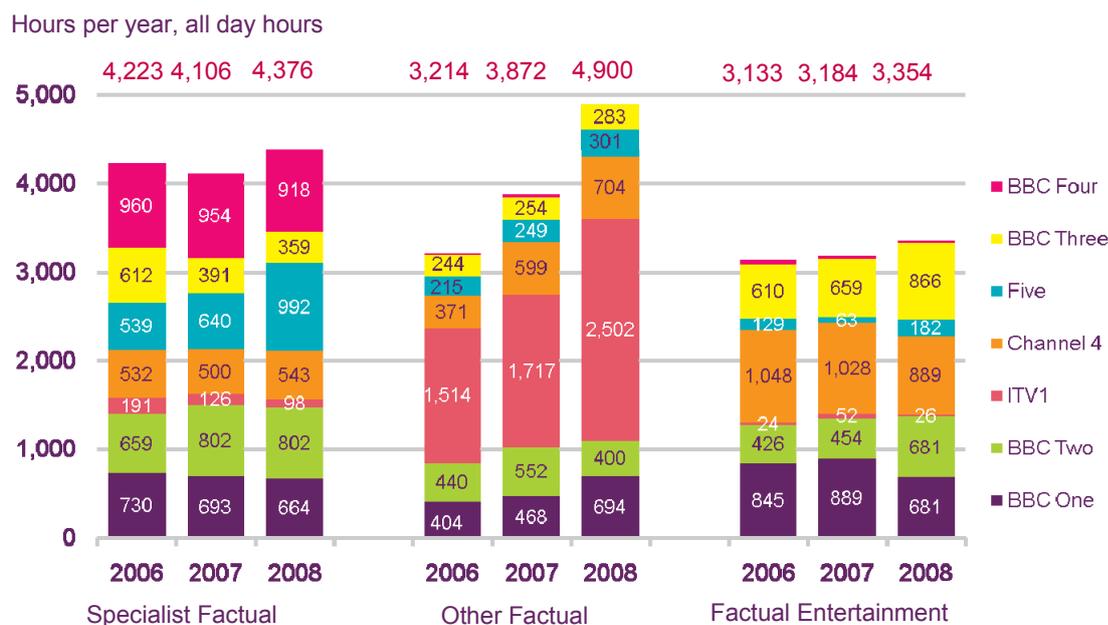
In comparison, the Factual Entertainment sub-genre grew modestly, from 3,133 hours in 2006 to 3,354 hours in 2008 (representing 7% growth). Most of this growth was a result of BBC Three adding some new titles to the schedule, such as *Don't Tell the Bride*, *Freaky Eaters* and *Last Man Standing* and to the high volume of repeats shown on this channel. BBC One reduced the amount of Factual Entertainment programming shown in 2008, but this was counterbalanced by an increase on BBC Two as a result of the introduction of new series, such as the weekly Sunday magazine show *Something for the Weekend* which ran throughout the year, as well as other shorter new Factual Entertainment series.

Specialist Factual programmes also increased in volume by 4% from 4,223 in 2006 to 4,376, despite reductions within the sub-genre by BBC Three, BBC Four and BBC One.

Five increased its Specialist Factual output from 2007 to 2008 (an increase of 352 hours or 55%). This consisted mainly of repeats of natural history and other documentaries and in 2008 this channel had a greater volume of this type of output than any other PSB channel. Channel 4 also increased its output of this genre in 2008 from the previous year (by 43 hours or 9%).

The BBC's contribution to Specialist Factual reduced from 2,840 hours in 2007 to 2,743 hours in 2008, a decrease of 97 hours or 3%. The Specialist Factual programming on BBC Two remained stable, but Nature & Wildlife programmes have reduced in volume on BBC One, there has been a reduction in Other Documentaries on BBC Three, and there were falls in History, Nature & Wildlife and Science on BBC Four. Despite BBC Four reducing Specialist Factual output, the channel was still a big contributor to the genre, showing 918 hours in 2008, with the schedule containing a high proportion of Other Documentaries, History and Science and Technology programmes.

Figure 5.2: Factual output 2006 – 2008, by sub-genre



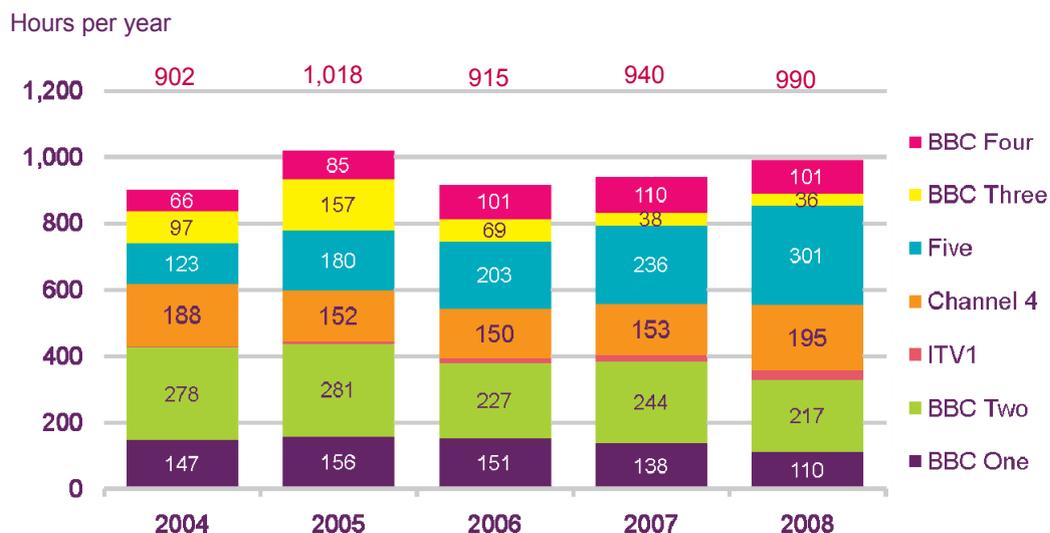
Source: Broadcaster returns

In the peak-time schedule, first-run Specialist Factual origination reached 990 hours in 2008. This represented an increase of 10% from 902 hours in 2004 and an increase of 5% from 940 hours in 2007 (Figure 5.3).

This rise in programming was driven mainly by Five, as a result of showing 301 hours of originated Specialist Factual in peak time in 2008, up from 123 hours in 2004 (a 145% increase). Over half of these hours fell into the Other Documentary sub-genre and included programmes such as *Animal Rescue Squad* and *Highland Emergency*.

Peak-time first-run Specialist Factual output across BBC One, BBC Two, BBC Three and BBC Four decreased from 530 hours in 2007 to 464 hours in 2008, down by 66 hours or 13%. The reductions were largely due to decreases on BBC One and BBC Two in the sub-genres of Science & Technology and Other Documentary programmes. On BBC One Nature & Wildlife programming decreased, but was compensated for by increases in this sub-genre on BBC Two. History programming also reduced on BBC Two.

Figure 5.3: First-run, peak time originated Specialist Factual output 2004 – 2008



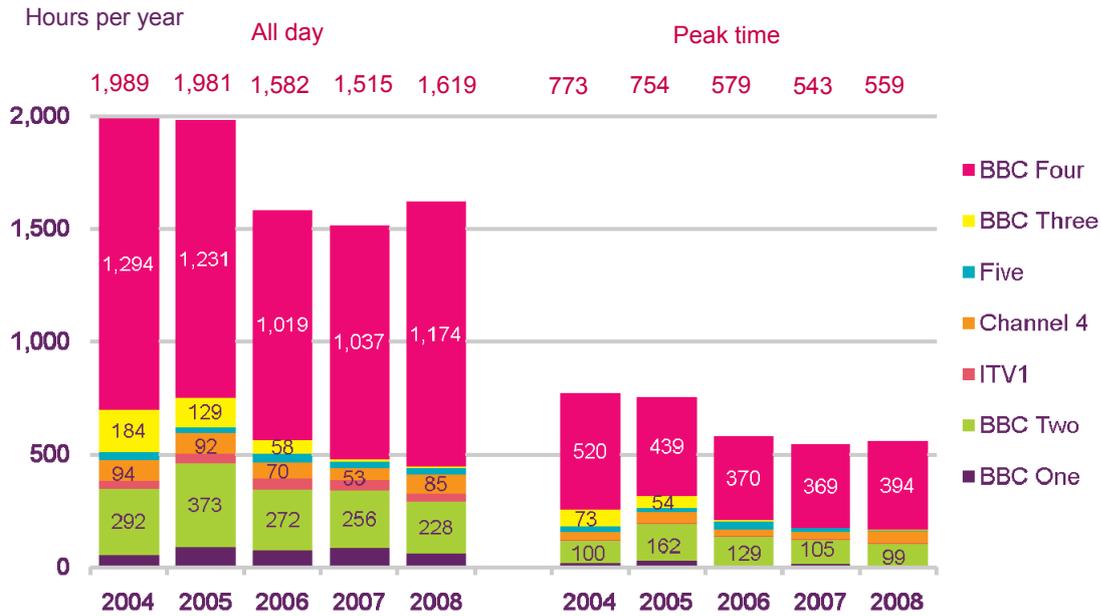
Source: Broadcaster returns

Arts and Classical Music

Figure 5.4 shows that since 2004 Arts and Classical Music programming decreased across both the all-day and peak-time schedules on all PSB channels taken together. Output has fallen by 19% (370 hours) since 2004 across the whole day, although there was a 7% rise from 2007 to 2008, due to increases on BBC Four year-on-year – this channel being by far the largest contributor in this genre.

In 2008, BBC Four accounted for 73% of Arts and Classical Music in the all-day schedule; the majority of these hours consisted of repeats with examples including the *Sacred Music* and *Masterpieces of Vienna* series. Arts output reduced on most channels over the five-year period, apart from on BBC One, where it increased slightly and on ITV1, where it remained constant. The largest drop in hours was on BBC Three, which aired 184 hours of Arts and Classical Music in 2004, compared to 8 hours in 2008, with reductions in repeated programmes driving this downward trend. Peak-time Arts and Classical Music reduced by 28% from 773 to 559 hours between 2004 and 2008, largely replicating the trends in the all-day schedule, as outlined above.

Figure 5.4: Arts & Classical Music output hours, 2004-2008



Source: Broadcaster returns

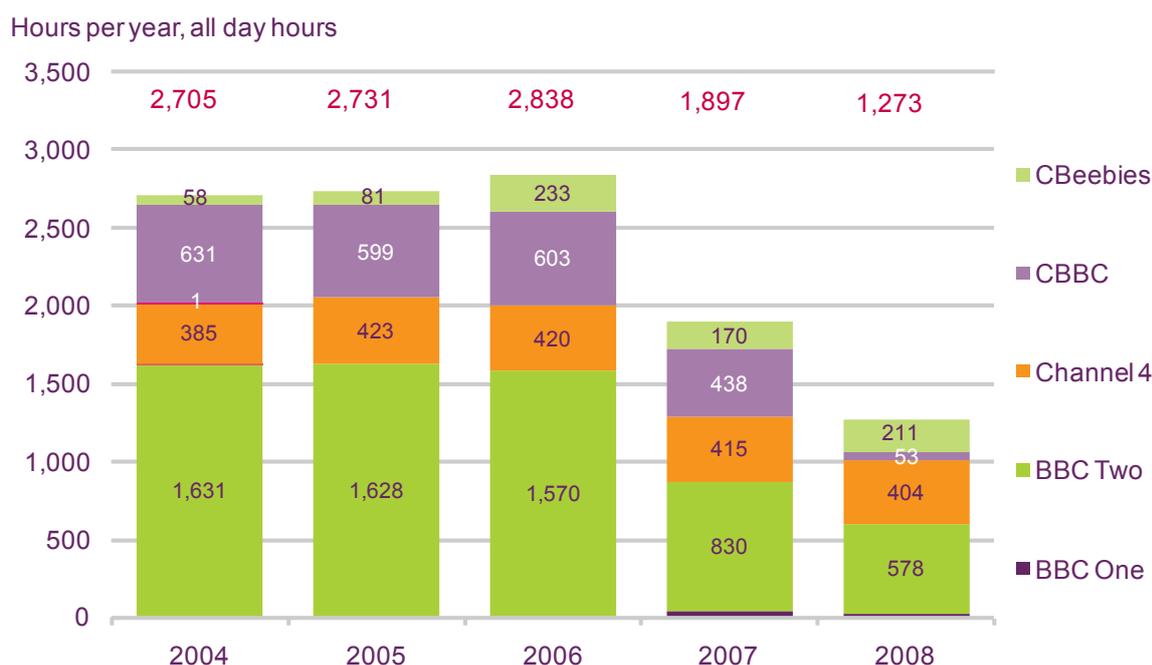
Education

Figure 5.5 illustrates that 'Formal' Education programmes (which include the BBC's and Channel 4's Schools programmes and the BBC's Learning Zone output) has reduced by 53%, from 2,705 hours broadcast in 2004 to 1,273 hours in 2008. The downward trend began in 2007 and occurred because fewer repeated Schools programmes were shown on BBC Two and CBBC and a reduction in the volume of BBC's Learning Zone programmes.

BBC Two reduced the hours of Formal Education output shown in 2008, down to 578 hours from 1,631 in 2004, and on CBBC the level dropped to 53 hours, with Schools programming on CBBC being replaced by a range of programming in the various Children's sub-genres. The majority of the Education hours shown on BBC Two in 2008 were Schools programmes, as were all of the 404 hours shown on Channel 4.

Note: Pre-school programmes are included within the Children's genre, as detailed in Section 9.

Figure 5.5: Formal Education output hours, 2004-2008⁸⁴



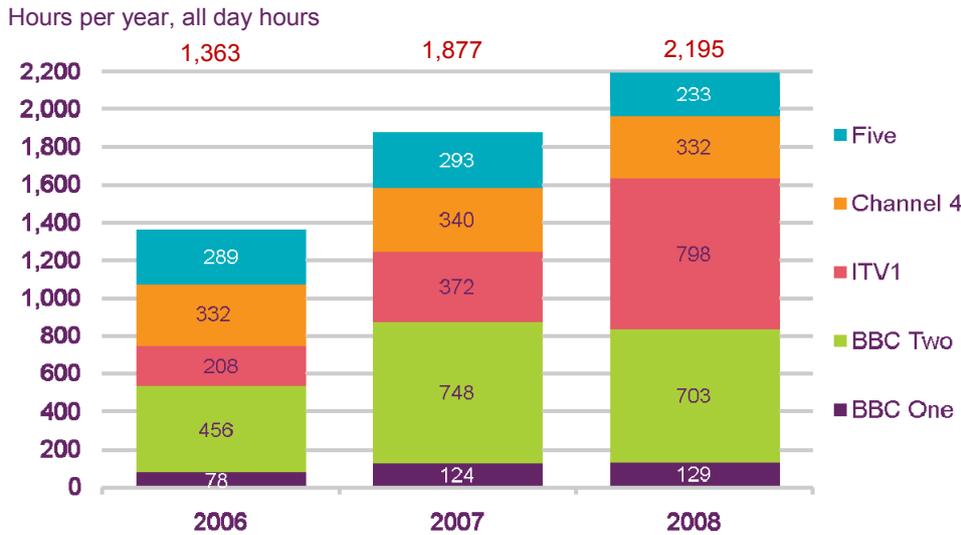
Source: Broadcaster returns

As well as Formal Education programmes (shown in the previous figure), broadcasters also invest in programmes with Learning Support, which have an educational intention and include support materials related to the content of the programme. Support materials may be available in print, via Teletext, the web or interactively, and programmes can be taken from any genre, including those that encourage the audience to improve life skills and coping techniques.

Figure 5.6 shows that Learning Support programmes have increased year-on-year, up by 61% from 1,363 hours in 2006 to 2,195 hours in 2008. ITV1 has seen the largest increase, up from 208 hours to 798 hours over the period. The way that they support programmes has changed in the last year so that, apart from help-lines, back-up is now downloadable from the website using instructional video clips, links and print downloads, rather than through the use of brochures and fact sheets as it used to be. In 2008, ITV1 programmes with Learning Support included *This Morning*, *Britain's Best Dish* and *Tonight with Trevor MacDonald*. BBC Two also increased its output of programming shown on the channel with support materials available, by 54% to 703 hours, mainly consisting of Children's programming.

⁸⁴ Formal Education programmes include Schools and the BBC Learning Zone and are provided by the BBC and Channel 4. Other Education programmes from all broadcasters are included as Learning Support.

Figure 5.6: Learning support, 2006 - 2008



Source: Broadcaster returns

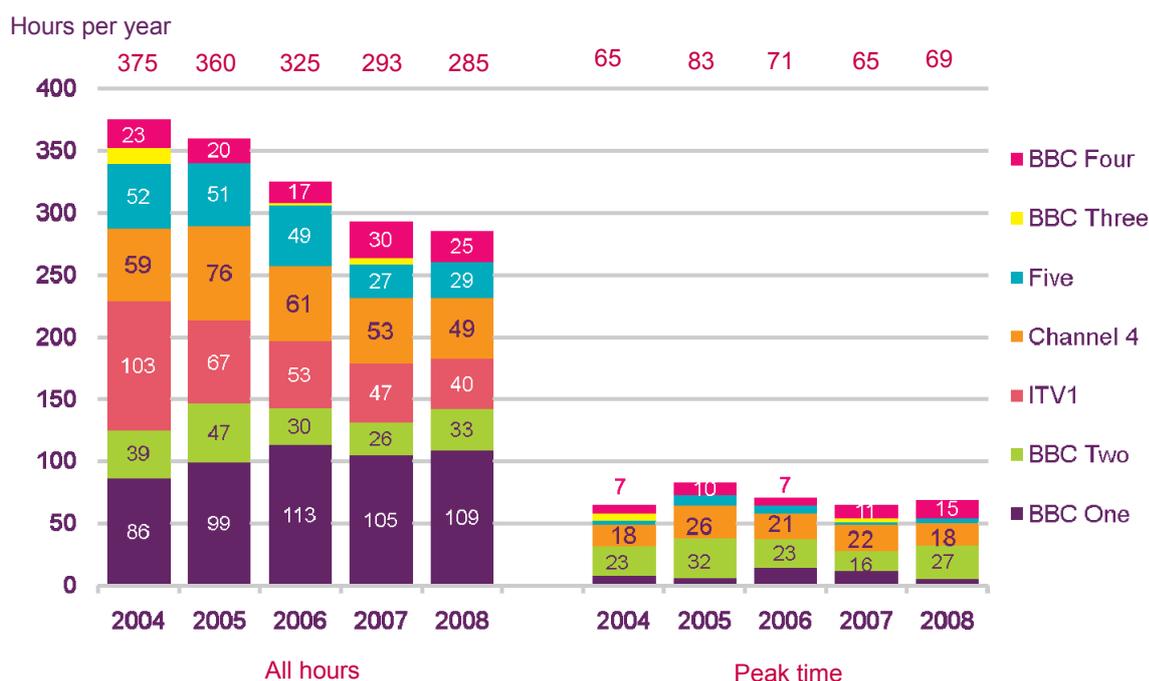
Religious programming

Figure 5.7 demonstrates that although the overall volume of Religious programming across the whole day has been declining since 2004, the decline appeared to stabilise in 2008, with a slower rate of decrease (3% or 8 hours). In peak time it showed a marginal increase. However, peak-time Religion represents less than 1% of the overall peak-time schedule.

All hours of Religious output fell by 24% (from 375 hours in 2004 to 285 in 2008), with ITV1 in particular reducing its hours broadcast (by 61% to 40 hours). This reduction followed the removal of formal quotas on ITV1 in 2004, with programmes such as *My Favourite Hymns* being removed from the ITV schedule.

Most other channels also reduced their Religious output, although it rose on BBC One from 86 hours in 2004 to 109 hours in 2008 (an increase of 27%).

Figure 5.7: Religious programming output hours, 2004 – 2008



Source: Broadcaster returns

Viewing figures

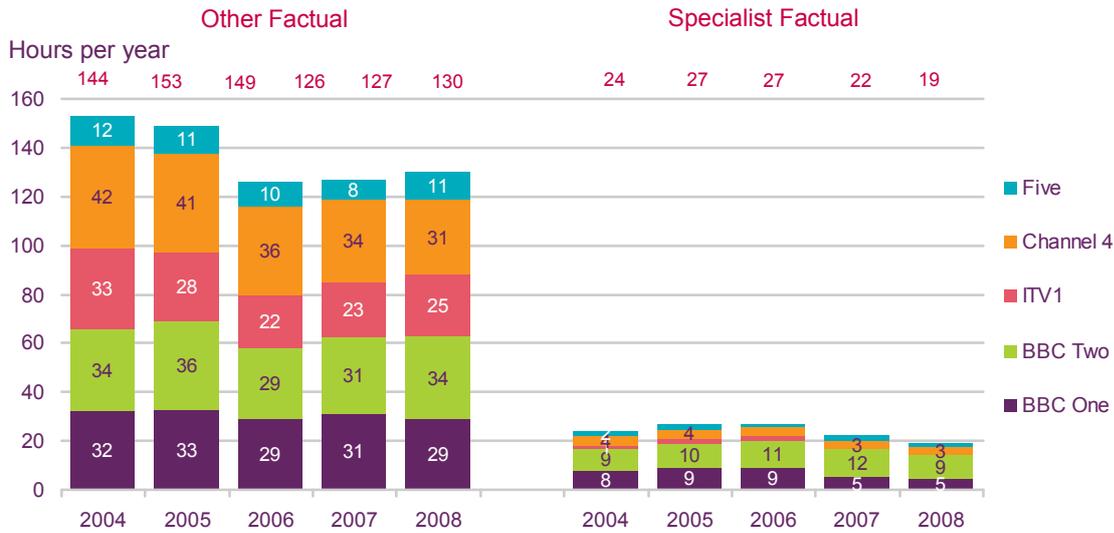
This section looks at hours viewed per average individual (aged 4+) for each of the Factual, Arts and Education genres. We have subdivided Factual programming into Specialist and Other Factual programming. The BARB categories used for Specialist Factual are Natural History, Science and Medical, History, and Factual Drama. Other Factual comprises Human Interest, Factual Entertainment, and the Hobbies & Leisure category.

Factual

Viewing of Factual programming on the five main PSB channels is shown in Figure 5.8. Over the past five years the total hours spent viewing both Other Factual and Specialist Factual has declined: Specialist Factual from 24 hours per year to 19 hours, and Other Factual from 144 hours to 130 hours.

Focusing on 2007 and 2008 reveals that the average person has increased their viewing of Other Factual by three hours a year, while viewing of Specialist Factual has decreased by three hours a year. Until 2007, most viewing of Other Factual was on Channel 4, but in 2008 slightly more hours of viewing of this genre was on BBC Two.

Figure 5.8: Split in total viewing of Other Factual and Specialist Factual (all individuals, five main PSB channels only) 2004 - 2008

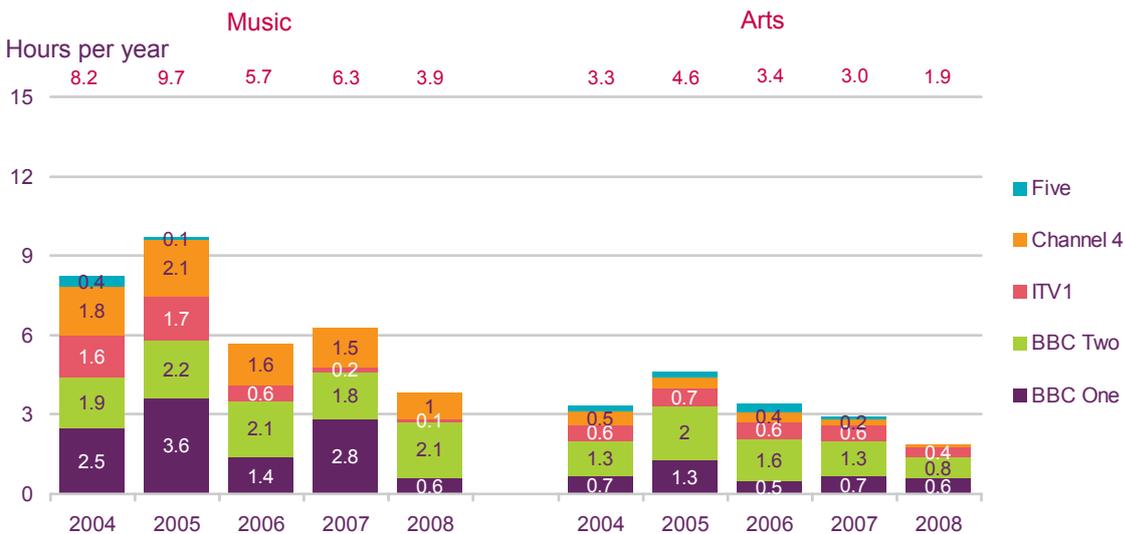


Source: BARB 2004-2008

Arts and Music

Overall hours of viewing of both Music and Arts declined between 2004 and 2008 (see figure 5.9). However, in 2005, both genres increased their viewing and this was seen again for Music in 2007. Most of the viewing of Music was on BBC One, except in 2006 and again in 2008 when BBC Two took the lead. In terms of Arts programming, most of the viewing went to BBC Two and this was still the case in 2008, although the gap between BBC One and ITV1 closed significantly due to the substantial decline in overall viewing.

Figure 5.9: Hours of total viewing of Music and Arts (all individuals, five main PSB channels only) 2004-2008



Source: BARB 2004-2008

Education

Viewing of Education programming has declined year on year, from 2.3 hours in 2004 to less than one hour in 2008. Viewing on BBC Two, the main provider of Education programming declined from 1.8 hours in 2004 to half an hour in 2008.

Figure 5.10: Hours of viewing of Education (all individuals, five main PSB channels only) 2004-2008

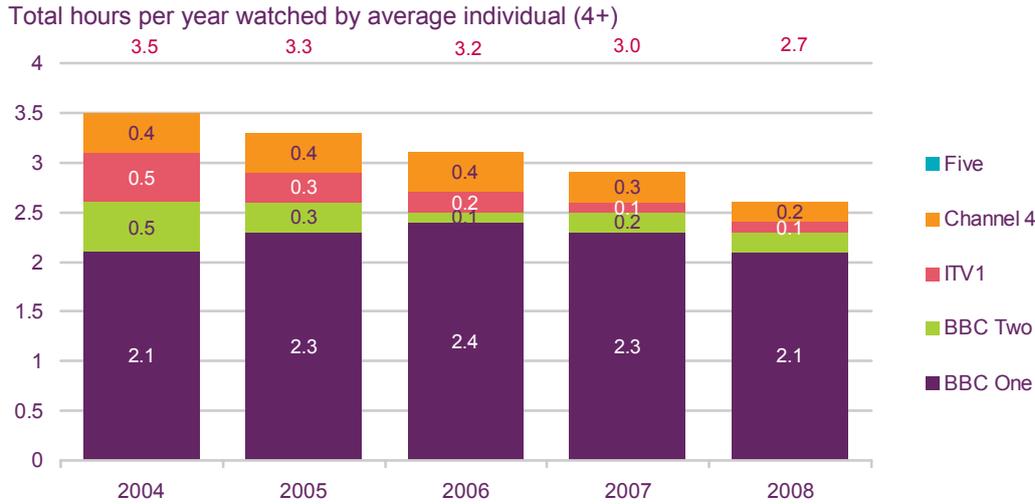


Source: BARB 2004-2008

Religious programming

Figure 5.11 shows a gradual decline in the total hours of viewing of Religious programming, from 3.5 hours in 2004 to 2.7 hours in 2008. The majority of this viewing in each of the past five years has been on BBC One. Individuals aged 65+ are much more likely to spend time viewing this genre than are younger individuals.

Figure 5.11: Religious programmes annual viewing hours, 2004 - 2008



Source: BARB 2004-2008

Audience impact

This section focuses on what viewers think about the delivery of PSB purpose 2 across the channels. The PSB Tracker asked two statements which, taken together, provide an indication of what audiences think of PSB broadcasters' delivery of purpose 2:

“It shows interesting programmes about history, science or the arts”

“As a result of watching its programmes I’ve become more interested in particular subjects”

“Shows interesting programmes about history, science or the arts”

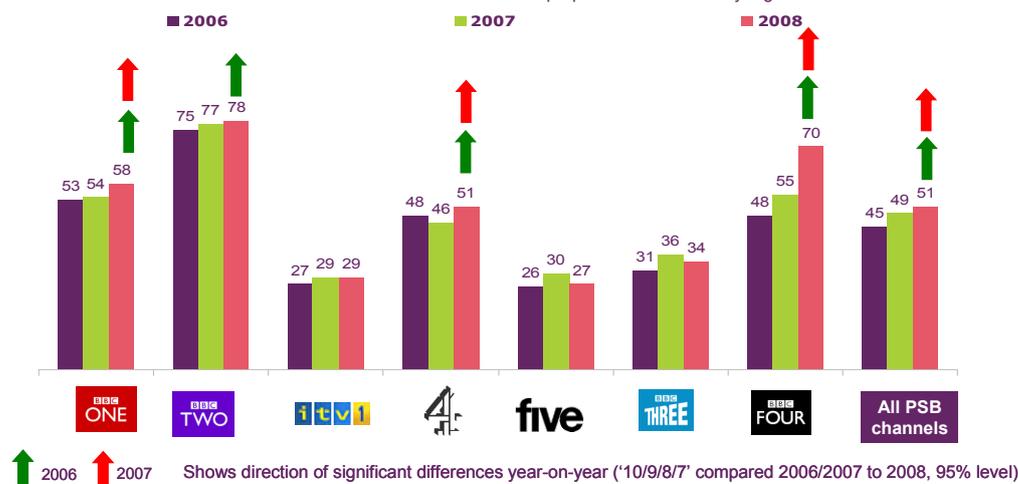
Figure 5.12 below shows how regular viewers of the PSB channels rated their delivery of *interesting programming about history, science or the arts*.

Nearly 8 in 10 of BBC Two’s regular viewers (78%) said it delivered against this statement in 2008, and increased ratings among BBC Four’s regular viewers showed that 7 in 10 of them also rated the channel highly on their *interesting programmes about history, science or the arts*. BBC One (58%) and Channel 4 (51%) were more likely than ITV1 (29%), Five (27%) and BBC Three (34%) to be seen by their regular viewers as delivering interesting programmes of this type.

Figure 5.12: Opinions on purpose 2: *interesting programmes*

It shows interesting programmes about history, science or the arts

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4906, 4850, BBC2 = 2420, 2360, 2334, ITV1 = 4027, 3669, 3587, Channel 4 = 2746, 2473, 2339, five = 1424, 1384, 1262, BBC3 = 481, 469, 541, BBC4 = 247, 284, 317
 Source: Ofcom PSB Tracker, GfK NOP

We analysed the profile of regular viewers who rated the individual channels highly on this element of PSB. This analysis allows us to make comparisons between channels, to identify which channels gained a higher proportion of those rating the channel highly falling in different demographic groups. Note: the actual proportion of the general population who rated the channels highly differs by channel and is not taken into account in this analysis.

This shows that among those who positively rated ITV1, a higher proportion were female (57%) than among those who rated BBC One (52%), BBC Two (49%) and BBC Four (45%) highly on this measure.

Those who rated Channel 4 and BBC Three highly on this element were more likely to be aged 16 – 34 than those rating all of the other channels highly (Channel 4: 45% were 16-34, BBC Three: 41%, BBC One: 27%, BBC Two: 22%, ITV1: 23%, Five: 27%, BBC Four: 25%).

Those who rated BBC One, BBC Two and Channel 4 highly on their delivery of *interesting programming about history, science or the arts* were more likely to be in the AB socio-economic groups than those rating ITV1 and Five positively (BBC One: 21%, BBC Two: 23%, Channel 4: 22%, ITV1: 12%, Five: 10%).

Becoming more interested in particular subjects

Figure 5.13 below shows whether regular viewers of the PSB channels responded by saying *they have become more interested in subjects as a result of watching programmes*.

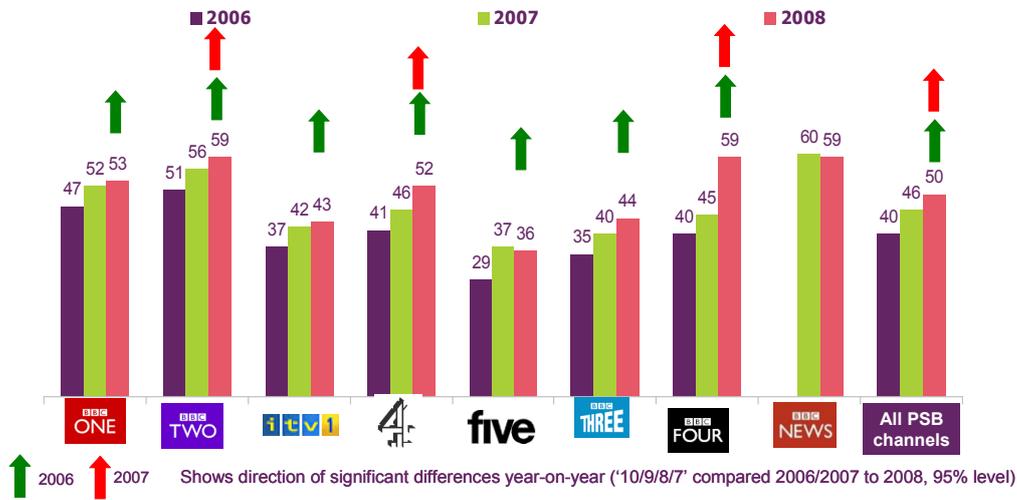
There was an increase in 2008 in the number of regular viewers of the majority of channels that rated these highly *on increasing viewers' interest in particular subjects*. This is a continuation of the strengthening, for many channels, first seen in 2007.

The largest increases in the ratings were for Channel 4 from 46% in 2007 to 52% in 2008, and BBC Four from 45% in 2007 to 59% in 2008.

Figure 5.13: Opinions on purpose 2: *stimulating learning*

As a result of watching its programmes I've become more interested in particular subjects

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: e.g. Jan 08, April 08, July 08, Oct 08) BBC1 = 5220, 4906, 4850, BBC2 = 2420, 2360, 2334, ITV1 = 4027, 3669, 3587, Channel 4 = 2746, 2473, 2339, five = 1424, 1384, 1262, BBC3 = 481, 469, 541, BBC4 = 247, 284, 317, BBC News = 796, 1507
 Source: Ofcom PSB Tracker, GfK NOP

We analysed the profile of regular viewers who rated the individual channels highly on this element of PSB. This analysis allows us to make comparisons between channels, to identify which channels gained a higher proportion of those rating the channel highly falling in different demographic groups. Note: the actual proportion of the general population who rated the channels highly differs by channel and is not taken into account in this analysis.

This shows that among those who positively rated ITV1 and Five on *encouraging interest in subjects*, a higher proportion were female (59% and 62% respectively) than among those who rated almost all other channels highly. Those who rated BBC Two highly on this measure were more likely to be male (51%) than for BBC One (45%), ITV1 (41%), Channel 4 (46%) and Five (38%).

Those who rated Channel 4 and BBC Three highly on this element were more likely to be aged 16 – 34 than those rating nearly all of the other channels (Channel 4: 46% were 16-4, BBC Three: 53%, BBC One: 30%, BBC Two: 22%, ITV1: 29%, Five: 26%, BBC Four: 28%).

Those who rated BBC One, BBC Two and Channel 4 highly on *encouraging interest in subjects* were more likely to be in the AB socio-economic groups than those rating ITV1, Five and BBC Three positively (BBC One: 18%, BBC Two: 21%, Channel 4: 19%, ITV1: 11%, Five: 11%, BBC Three: 11%).

Assessment of Pulse survey data for purpose 2

In the BBC-GfK Pulse survey, respondents were asked to rate programmes on the following statements that relate directly to PSB purpose 2:

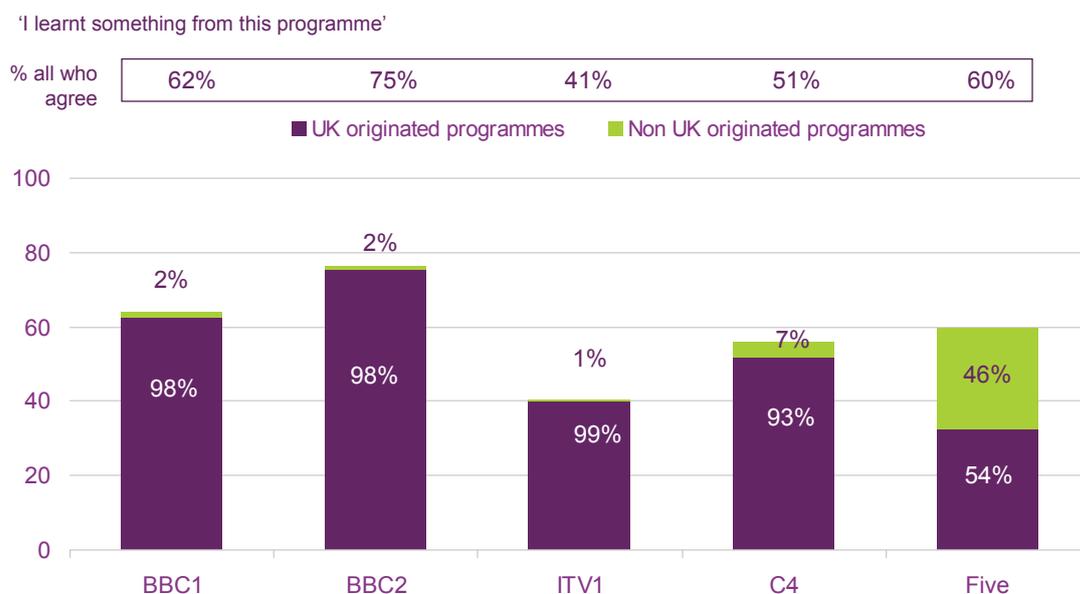
“I learnt something from watching this programme”

“This programme was inspiring”

Responses to these programme-specific questions were then aggregated in order to provide an insight into channel delivery on these statements. One viewer may therefore be giving opinions on more than one programme, as well as multiple episodes within a series. Respondents who participated in the Pulse survey rated programmes which they had themselves chosen to watch, and so high levels of agreement with these statements may be expected.

Pulse data from 2008⁸⁵ are reported here on whether viewers *felt they learnt something from the programmes they watched*. For all programmes for which viewers agreed they learnt something, they also show the proportions which relate to programmes originated in the UK or from elsewhere. Viewers agreed that they were most likely to gain new information or learn something from the programmes transmitted on BBC Two (75%) while the majority of responses for programmes watched on BBC One and Five also indicated that they had taught the viewer something (62% and 60% respectively). Reflecting the origin of the channel's output, just under half of the positive responses to learning something from Five's programmes related to those produced outside the UK, in contrast to the very small number of positive responses for programmes produced outside the UK that were transmitted on other channels.

Figure 5.14: Pulse survey opinions – Learning from programmes, UK vs. non-UK programmes



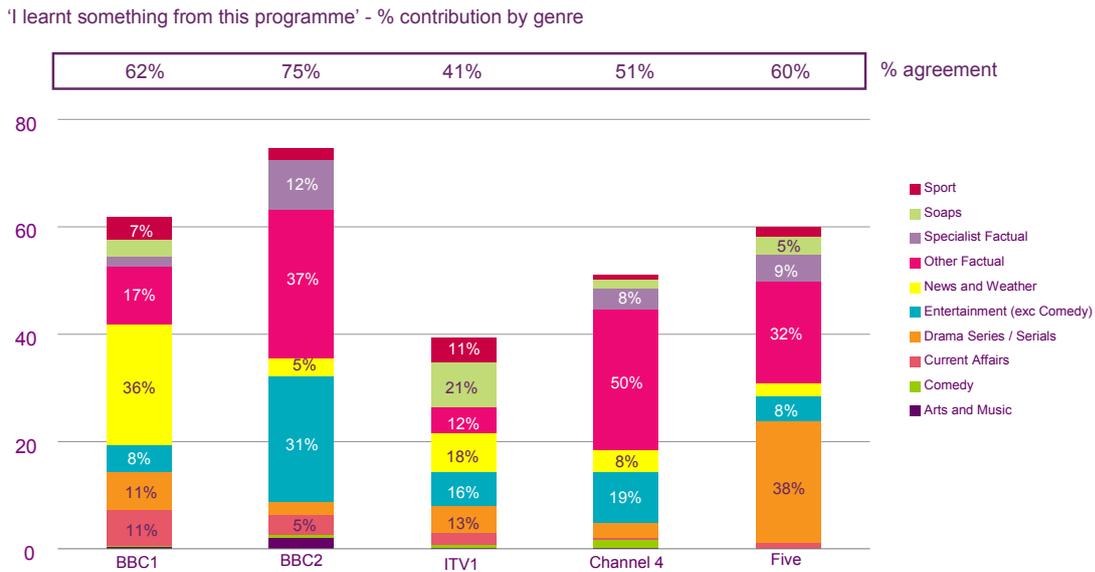
Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All programmes excluding Children's & Party Political Broadcasting
 Base: BBC1 996884, BBC2 255586, ITV1 619892, C4 261377, Five 134433

Figure 5.15 shows the proportion of programmes responded to in the Pulse survey that viewers agreed they learnt something from. This is shown for each channel separately. In this figure we can see which genres contribute most to viewers' learning on television. This is interesting as it demonstrates the wide range of genres that can be seen to be contributing

⁸⁵ In the Pulse survey, programmes are aggregated by genre lists in accordance with Broadcasting Dataservices' (BDS) classifications. This differs from BARB and broadcaster returns' genre classification. Initially, therefore, genres are not directly comparable. In previous PSB Annual Reports the BDS Specialist Factual genre was amended by Ofcom to fit more closely the BARB and broadcaster returns' classifications. However, for the analysis of 2008 Pulse data GfK NOP worked to overlay the BARB genre classifications onto the Pulse data to give data that is as comparable as possible with the other data sources reported within this report. Therefore within this report, the Figures showing Pulse data analysis by genres show 2008 data only.

to this PSB purpose. Responses on BBC Two relating to learning something tended to be for Other Factual (37%), Entertainment (31%) and Specialist Factual (12%) programmes. On BBC One responses related most to News (36%) or Other Factual programmes (17%) and on Channel 4 for Other Factual (50%) and Entertainment programmes (19%). Responses from viewers of Five's programmes indicate that the majority of their learning came from Drama Series or Serials (38%) and Other Factual (22%). Positive responses regarding learning something from ITV1's programmes spanned a range of genres, including Soaps (21%).

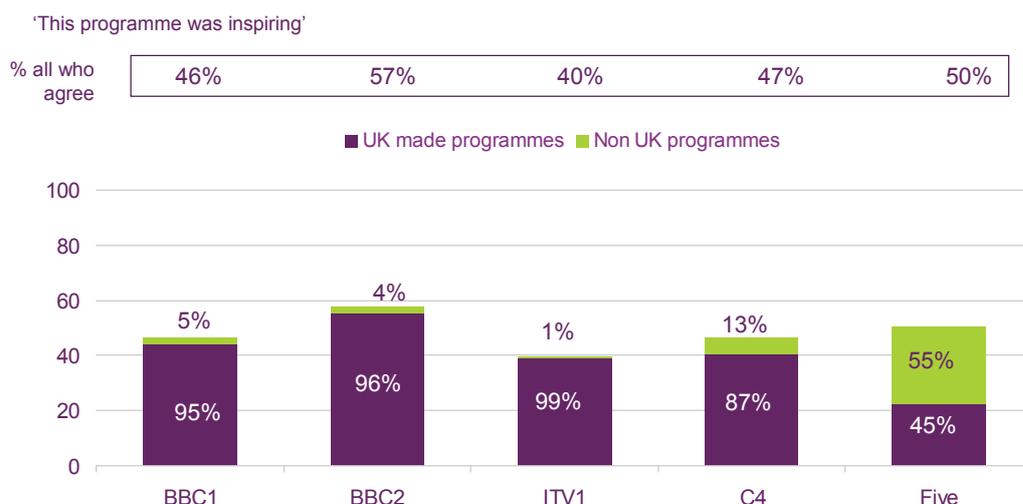
Figure 5.15: Pulse survey opinions– Learning from programmes, contribution of genres



Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All programmes excluding Children's & Party Political Broadcasting
 Base: BBC1 996884, BBC2 255586, ITV1 619892, C4 261377, Five 134433

Figure 5.16 shows whether responses to programmes indicated that they were *inspiring* and what proportion of the positive responses were for programmes made in the UK or made elsewhere. This shows that between 4 in 10 and 6 in 10 of responses to programmes on the five main PSB channels indicated the programmes were *inspiring*, with BBC Two's programmes most likely to be thought of as such (57%). Over half (55%) of the agreement that Five's programmes were *inspiring* was for programmes made outside the UK, in contrast to other channels whose inspirational output is more focused on programmes from the UK.

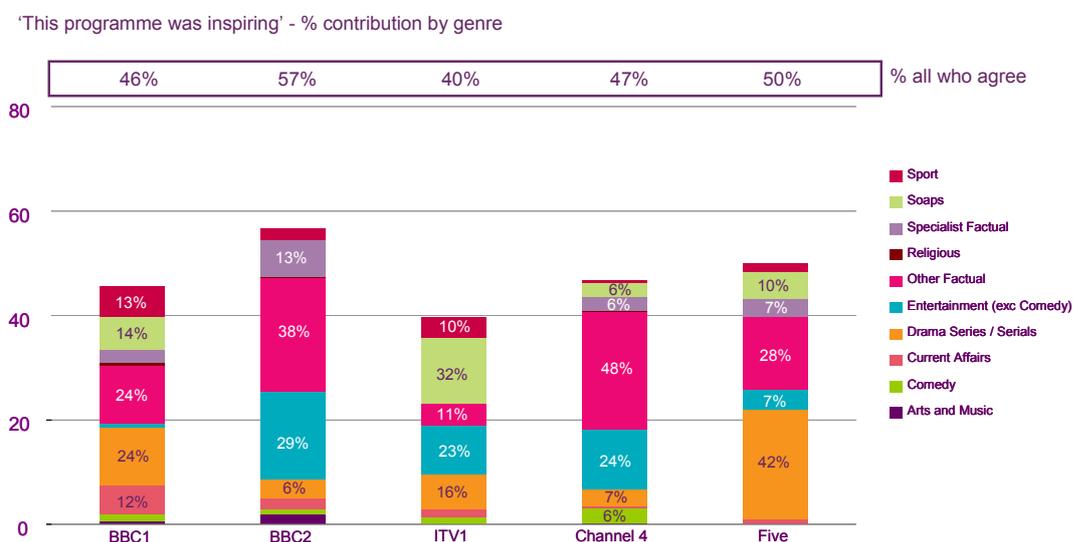
Figure 5.16: Pulse survey opinions – programme was *inspiring*, UK vs. non-UK programmes



Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All programmes excluding Children, Party Political Broadcasting, Film and News genres
 Base: BBC1 611389, BBC2 202295, ITV1 465832, C4 204870, Five 106631

Figure 5.17 shows the contribution, by genre, to those programmes which viewers agreed were inspiring. Programmes that viewers found *inspiring* on BBC Two and Channel 4 tended to be Other Factual and Entertainment programmes, while the genre of *inspiring* programmes on BBC One and ITV1 was more varied. Drama Series/Serials made a larger contribution to the programmes viewers found inspiring on Five than on other channels, partly because this genre forms a larger proportion of all programme responses made on the Pulse survey for Five.

Figure 5.17: Pulse survey opinions – programme was *inspiring*, contribution of genres

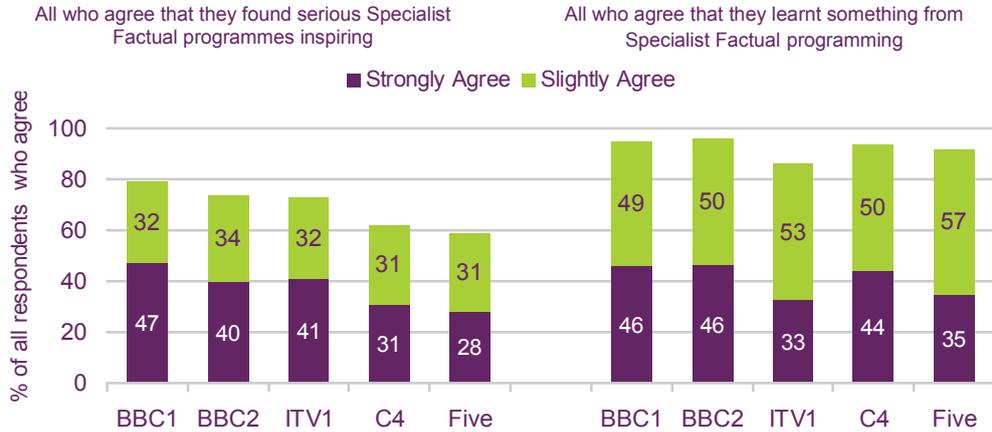


Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All programmes excluding Children, Party Political Broadcasting, Film and News genres
 Base: BBC1 611389, BBC2 202295, ITV1 465832, C4 204870, Five 106631

Figure 5.18 looks at audience opinions on Specialist Factual programmes in particular. This shows that over 9 in 10 responses said that Specialist Factual programmes on BBC One, BBC Two, Channel 4 and Five provided some educational content to the viewer or gave the viewer new information. Eight in ten responses to ITV1's Specialist Factual programmes were rated in this way.

Positive responses indicated that BBC One (79%), BBC Two (74%) and ITV1's (73%) Specialist Factual programmes were more likely to be seen as *inspiring* by viewers than Channel 4's (62%) and Five's (59%) Specialist Factual programmes, although it should be noted that the ITV1 data derive from a relatively low base size, due to the small volume of Specialist Factual programmes in the schedule.

Figure 5.18: Pulse survey opinions – Specialist Factual



Source: BBC Pulse Survey/GfK NOP, January-December 2008, All programmes classified by BARB as Documentary – History, Natural History, Factual Drama and Science & Medical
 Base: BBC1 38646, BBC2 41819, ITV1 851, C4 18080, Five 13088

Section 6

PSB purpose 3: *reflecting UK cultural identity*

Introduction

This chapter examines the PSB purpose 3, as defined in Ofcom's 2004 *PSB Review*:

To reflect and strengthen our cultural identity through original programming at UK, national and regional level, and by occasionally bringing audiences together for shared experiences

Purpose 3 is not necessarily aligned to any single programme genre, but rather focuses on the fostering of cultural identity at both a UK and a regional/nation level, which can happen within a number of genres.

Within this section we have focused on two elements relating to this purpose. The first relates to a UK cultural identity and 'shared experience'. This encompasses both the reflection of particular viewpoints across the UK, and also nation-wide events and issues that are widely watched. In other words, it is both about a particular programme getting a wide airing, and also about mainstream content being widely shared and enjoyed.

The other element is related to programming that is connected with particular regions or nations, either because it is created specifically for a region or nation, or because it includes or portrays people from different parts of the UK.

Nations and regions News was included in this purpose in previous reports and can be seen to straddle both purpose 3 and purpose 1. However, given its specific focus on News, this will now be reported as part of purpose 1, alongside data on News and Current affairs more generally (see earlier section). Additional detail relating to the delivery of this purpose can be found in the sections of this report on the devolved nations and the English regions, including broadcaster data on 'Other' nations/regions output that is not classified as News or Current Affairs.

Children's programming can be considered as part of purpose 3, but this has been reported as a separate section within the main body of this report (see section 9).

This section therefore mainly focuses on the 'softer' measures of audience impact, although it does include an overview of programme production outside London in 2008. In this section we focus on the five main PSB channels, plus BBC Three and BBC Four, although this purpose has particular relevance for ITV1⁸⁶, given its required provision of nations and regions output.

The *Second Review of PSB* found that *reflecting UK cultural identity* and programming other than News in the nations were considered key areas of PSB by viewers.

⁸⁶ Within the PSB Tracker, Channel 3 is more simply referred to as ITV1 for all respondents in all nations. Note: within Scotland Channel 3 is STV, within Northern Ireland Channel 3 is UTV and within Wales it is ITV1 Wales.

Summary findings

UK cultural identity

Audience impact

- In 2008, BBC One (80%), BBC Two (66%) and ITV1 (67%) were rated highest on *coverage of big national events* by their regular viewers. Increases in ratings for BBC Two since 2006 on this measure mean BBC Two now rivals ITV1 in this area.
- In 2006, ITV1 was rated higher than any other channel by regular viewers for showing *high quality Soaps or Drama made in the UK* (69%). However, given the strengthening of opinions of regular viewers of BBC One, and the decrease in the proportion of ITV1's regular viewers who rate the channel highly, ITV1's dominance in the perceived delivery of *high quality soaps and dramas made in the UK* is decreasing. All the other PSB channels asked about, with the exception of Five, increased their ratings on this measure among their regular viewers in 2008.
- Pulse data show that responses about programmes on BBC Two (80%) and Channel 4 (77%) indicated that these programmes were most likely to be *talked about with other people*, although this was also the case for over two-thirds of the programmes of the other three channels. Programmes that viewers agreed *they would talk about with others* on BBC Two and Channel 4 tended to be Other Factual and Entertainment (excluding Comedy), while on Five they were more likely to be Drama Series/Serials. Soaps were a prominent genre contributing to this response on ITV1, and News was a prominent genre on BBC One.

Nations and regions

Output⁸⁷

- Television production companies tend to be based in London, and consequently the majority of programmes commissioned by PSBs for network broadcasting across the UK are made within the M25. Based on the value of those network productions, 61% of the money spent in 2008 was on productions made in London, while 39% was spent within the English regions and devolved nations. In terms of the hours of programmes broadcast in 2008, 35% were made outside London. Note: this excludes non-network programming made specifically for broadcast in the devolved nations and English regions.
- Based on programme volume, 36% of output made outside London in 2008 was from the North of England, 31% from the South and 25% from the Midlands and East of England. Productions made in Scotland, Wales and Northern Ireland comprised 8% of all production outside London. Note: this excludes non-network programming made specifically for broadcast in the devolved nations and English regions.

⁸⁷ For more detail on output for regions and nations, see other sections within the report: nations and regions News is reported as part of purpose 1 in section 4, and additional detail relating to the delivery of this purpose can be found in sections 10 to 11 of this report on the devolved nations and the English regions (including broadcaster data on 'Other' nations/regions output that is not classified as News or Current Affairs).

Audience impact

- Unlike the majority of other statements asked within the PSB Tracker, the statement; *Aside from news, it provides a range of good quality programmes about my region/nation, made for people in my region/nation* shows no significant increase in ratings by regular viewers of the PSB channels over time. In the UK overall, ratings for BBC One, BBC Two and ITV1 remain relatively stable on this statement over time, and the proportion of regular viewers rating the channels highly were 42%, 29% and 41% respectively in 2008.
- In 2008, as in previous years, BBC One and ITV1 scored more highly than the other channels on *portraying my regions/nation well to the rest of the UK*, with around four in ten of their regular viewers agreeing with this.
- Regular viewers of each of the PSB channels had a stronger view that their Entertainment and Factual programmes *show people from different parts of the UK* in 2008 than in 2006. Of the five main PSB channels, only Five has less than 50% of regular viewers rating its channels highly on this measure – possibly a reflection of their experience of Five's non-UK originated programming.

UK cultural identity: audience impact

This section focuses on what viewers think about the delivery of the UK cultural element of PSB purpose 3 across the channels. There are two statements from the PSB Tracker that together provide an indication of the extent to which viewers feel that this element of PSB purpose 3 is being carried out by the broadcasters:

"It covers big national events well, like sports, music events or major news stories"

"It shows high quality soaps or dramas made in the UK "

Coverage of big national events

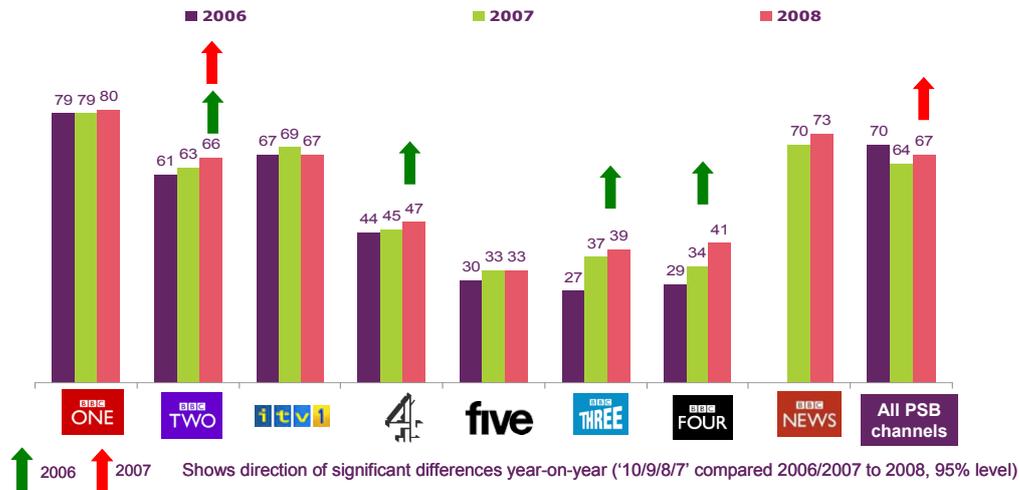
Figure 6.1 below shows how regular viewers of the individual PSB channels rated their *coverage of big national events*. It should be noted that this statement may reflect the amount and type of big national events that occur in a year, as well as the channel's coverage of these.

In 2008, BBC One (80%), BBC Two (66%) and ITV1 (67%) were rated the highest on *coverage of big national events* by their regular viewers. Increases in ratings for BBC Two since 2006 on this measure mean BBC Two now rivals ITV1 in this area. Perhaps unsurprisingly, given the nature of the channel and its focus on news, BBC News continues to gain high ratings on this measure among its regular viewers, with 73% rating the channel highly (between 7 and 10 in 10) on this,

Figure 6.1: Opinions on purpose 3: it covers big national events well

It covers big, national events well, like sports, music events or major news stories

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317, BBC News = 796, 1507
 Source: Ofcom PSB Tracker, Gfk NOP

We analysed the profile of regular viewers who rated the individual channels highly on this element of PSB. This analysis allows us to make comparisons between channels, to identify which channels gained a higher proportion of those rating the channel highly falling in different demographic groups. Note: the actual proportion of the general population who rated the channels highly differs by channel and is not taken into account in this analysis.

This shows that among those who positively rated ITV1, Channel 4 and Five on their *coverage of big national events*, a higher proportion were female than among those who rated BBC One, BBC Two and BBC News highly on this measure. (ITV1: 58% were female, Channel 4: 58%, Five: 60%, BBC One: 54%, BBC Two: 51%, BBC News: 45%)

Those who rated Channel 4 and BBC Three highly on this element were more likely to be aged 16 – 34 than those rating all of the other channels highly (Channel 4: 45% were 16-34, BBC Three: 50%, BBC One: 29%, BBC Two: 20%, ITV1: 29%, Five: 28%, BBC Four: 28%, BBC News: 26%).

Those who rated BBC One, BBC Two and Channel 4 highly on their *coverage of big national events* were more likely to be in the AB socio-economic groups than those rating ITV1, Five and BBC Three positively (BBC One: 20%, BBC Two: 20%, Channel 4: 19%, ITV1: 15%, Five: 11%, BBC Three: 10%).

Among those rating the channels highly on this measure, Channel 4 and Five have a higher proportion of people from an ethnic minority group (7% and 10% respectively) than BBC One (5%), BBC Two (4%) and ITV1 (5%).

UK high-quality Soaps and Drama

Figure 6.2 below shows how regular viewers of the PSB channels rate their delivery of *high quality Soaps or Drama made in the UK*.

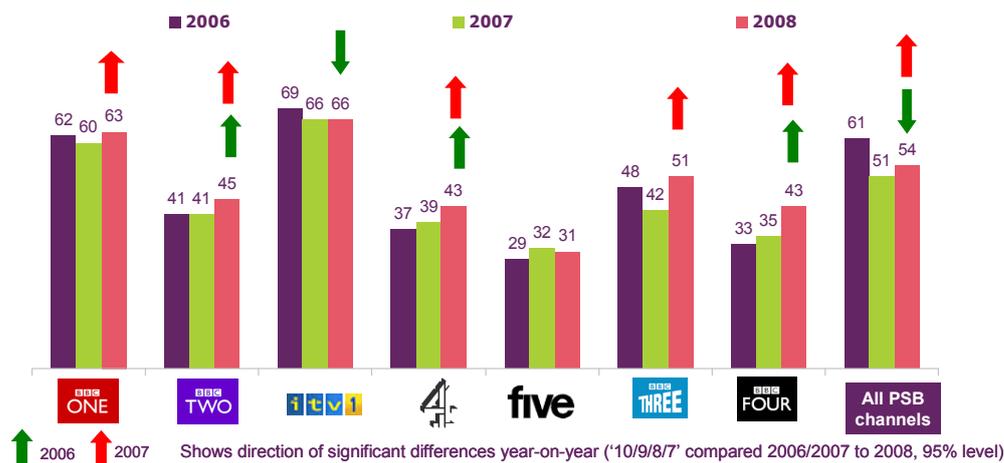
In 2006, ITV1 was rated higher than any other channel by regular viewers for showing *high quality Soaps or Drama made in the UK* (69%). However, given the strengthening of

opinions of regular viewers of BBC One on this, and a decrease in the number of ITV1's regular viewers who rate the channel highly, ITV1's dominance in the perceived delivery of *high quality soaps and dramas made in the UK* is decreasing (BBC One 63% and ITV1 66% in 2008). All the other PSB channels asked about, with the exception of Five, increased their ratings on this measure among their regular viewers in 2008; BBC Two (45%), Channel 4 (43%), Five (31%), BBC Three (51%) and BBC Four (43%).

Figure 6.2: Opinions on purpose 3: it shows high quality soaps or dramas made in the UK

It shows high quality soaps or dramas made in the UK

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4906, 4850, BBC2 = 2420, 2360, 2334, ITV1 = 4027, 3669, 3587, Channel 4 = 2746, 2473, 2339, five = 1424, 1384, 1262, BBC3 = 481, 469, 541, BBC4 = 247, 284, 317

Source: Ofcom PSB Tracker, GfK NOP

We analysed the profile of regular viewers who rated the individual channels highly on this element of PSB. This analysis allows us to make comparisons between channels, to identify which channels gained a higher proportion of those rating the channel highly falling in different demographic groups. Note: the actual proportion of the general population who rated the channels highly differs by channel and is not taken into account in this analysis.

This shows that among those who positively rated Five on having *high quality soaps or dramas made in the UK*, a higher proportion (70%) were female than among those who rated any of the other channels highly on this measure. Those who rated ITV1 highly were more likely to be female (62%) than those rating BBC One (58%), BBC Two (54%) and BBC Four (47%) highly.

Those who rated Channel 4 and BBC Three highly on this element were more likely to be aged 16 – 34 than those rating all of the other channels (Channel 4: 51% were 16-34, BBC Three: 57%, BBC One: 33%, BBC Two: 21%, ITV1: 30%, Five: 29%, BBC Four: 28%).

Those who rated BBC One, BBC Two and Channel 4 highly on having *high quality soaps or dramas made in the UK* were more likely to be in the AB socio-economic groups than those rating ITV1, Five and BBC Three positively (BBC One: 19%, BBC Two: 22%, Channel 4: 18%, ITV1: 14%, Five: 11%, BBC Three: 12%).

Assessment of Pulse survey data for purpose 3

In the BBC-GfK Pulse survey, respondents were asked to rate programmes on the following statement, which can be related to PSB purpose 2 as capturing an element of the 'shared experience' offered by some programming:

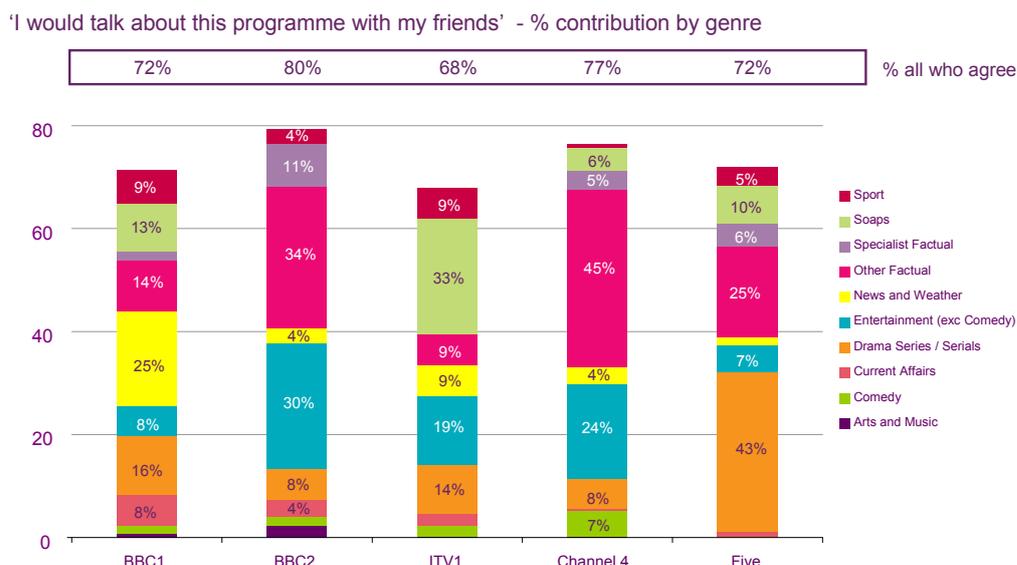
“It is the kind of programme that I would talk to other people about”

Responses to this programme-specific statement were then aggregated in order to provide an insight into channel delivery on these statements. One viewer may therefore give opinions on more than one programme, as well as multiple episodes within a series. The Pulse survey does not distinguish between positive or negative comment and while in the majority of cases it can be assumed that this measure relates to positive comment, it should be noted that the measure will also capture elements of negative comment. Furthermore, since respondents who participate in the Pulse survey rate programmes which they have themselves chosen to watch, high levels of agreement with these statements may be expected.

Figure 6.3 shows the proportion of programmes on each channel that viewers agreed they *would talk about with other people*, and shows which genres contribute most to the aggregated channel score for this measure. Responses for programmes on BBC Two (80%) and Channel 4 (77%) were most likely to show agreement that they were discussed with other people, although this was also the case for over two-thirds of the programme responses for the other three channels.

Programmes that viewers agreed *they would talk about with other people* on BBC Two and Channel 4 tended to be Other Factual and Entertainment (excluding Comedy), while on Five these programmes were more likely to be Drama Series/Serials. Soaps were a prominent genre contributing to talking about programmes for ITV1, and News was a prominent genre on BBC One. Once again, reflecting the source of the most-watched programmes on Five, programmes which viewers agreed they would talk about on Five were more likely than the other main PSB channels to be non-UK originated (56%).

Figure 6.3: Pulse survey opinions – Would talk about this programme, contribution of genres



Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All programmes excluding Children, Film and PPB genres
 Base: BBC1 996123, BBC2 255121, ITV1 620713, C4 261420, Five 134341

Nations and regions

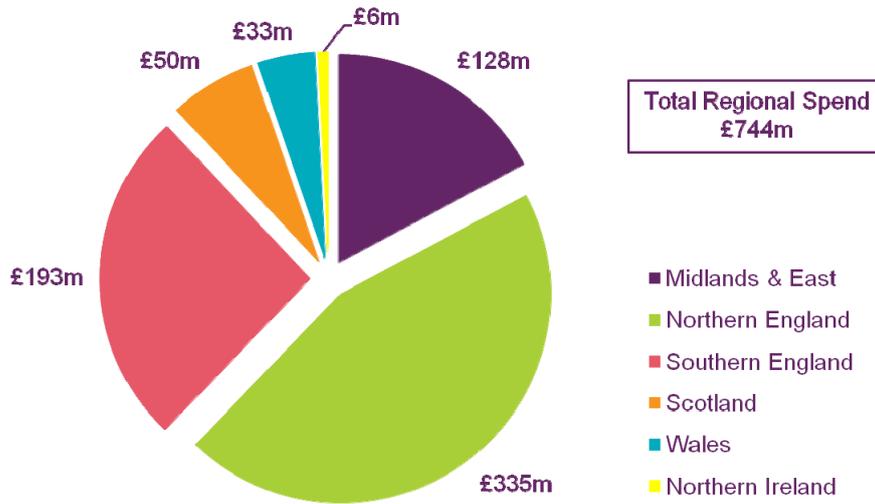
Output: production outside London

Television production companies tend to be based in London and consequently the majority of programmes commissioned by PSBs for network broadcasting across the UK are made *within* the M25. Quotas apply to each broadcaster and are two-fold – one for value, which applies to the amount of money spent outside London; and the other for volume, which relates to the number of hours broadcast. In order to qualify for the quota, programmes must comply with Ofcom’s Regional Production Definition, which sets three criteria: having a production base in the location; achieving a minimum level of expenditure in the nation or region; and achieving a minimum spend on production talent. In order to qualify, programmes must meet two of the three criteria.

Based on the value of productions, 61% were made in London in 2008, while 39% were made in the English regions, Scotland, Wales and Northern Ireland. Note: this excludes non-network programming made specifically for broadcast in the devolved nations and English regions.

The total value of productions made *outside* London was £745m, which includes commissions from independent producers as well as productions made in-house by the PSBs themselves (these figures exclude the costs of news and sports rights). Figure 6.3 illustrates that of this total, £335m (or 45%) was spent on programmes made in the North of England, £193m (26%) in the South of England and £128m (17%) in the Midlands and East regions. Spend in the devolved nations amounted to £88m (12%).

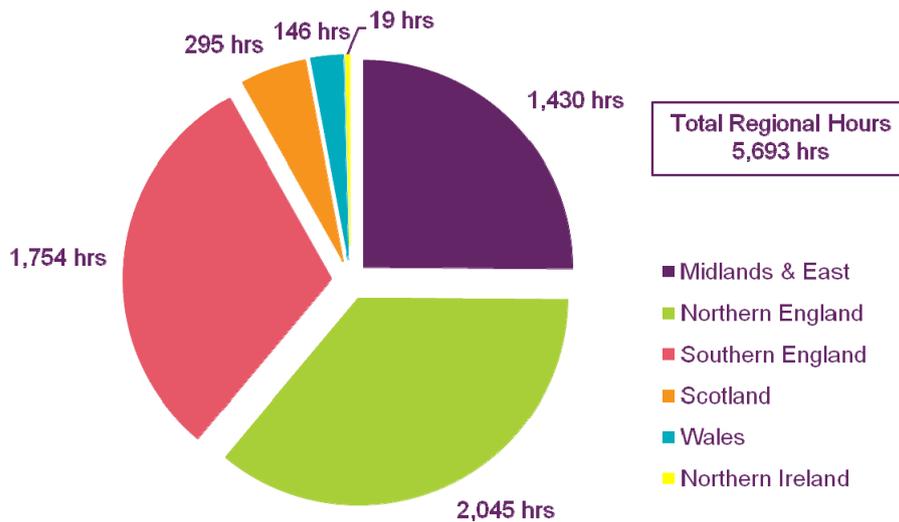
Figure 6.4: Breakdown of out-of-London production by all PSBs in 2008, by value



Of the hours of programmes produced in 2008, 35% (totalling 5,693 hours) were made outside London.

Figure 6.5 analyses the total volume of programming made outside London, split by nation and region. Of this, 2,045 hours (36%) was from the North of England; 1,754 hours (31%) from the South and 1,430 hours (25%) from the Midlands and East of England. Productions made in Scotland, Wales and Northern Ireland totalled 460 hours (8%).

Figure 6.5: Breakdown of out-of-London production by all PSBs in 2008, by volume



Audience impact

This section shows what viewers think about the delivery of nations and regions programming.

Note: More detailed information relating to nations and regions News can be found in the earlier section on Purpose 1 and more detailed information for individual nations and the English regions can be found in sections 10 to 13.

The PSB Tracker statements that relate to regions/nations representation are:

“Aside from news, it provides a range of good quality programmes about my region/nation, made for people in my region/nation”

“It portrays my region/nation well to the rest of the UK”

“Its entertainment and factual programmes show people from different parts of the UK”

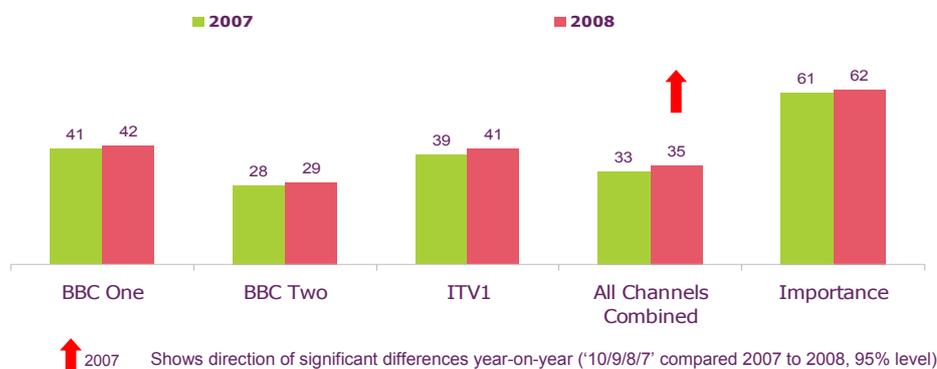
Non-News nations/regional programmes

Only BBC One, BBC Two and Channel 3 show non-News nations/regions programmes, and therefore Figure 6.6 shows results for these channels only.

Unlike the majority of other statements asked about within the PSB Tracker, this statement about non-News regional programmes does not show significant increases in ratings of the individual channels by regular viewers of the PSB channels over time. Overall in the UK, ratings for BBC One, BBC Two and ITV1 remained relatively stable and the proportion of regular viewers rating the channels highly on this were 42%, 29% and 41% respectively in 2008.

Figure 6.6: Opinions on purpose 3: non-News nations/regions programmes

Aside from news, it provides a range of good quality programmes about my region, made for people in my region
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 3536, 6798,
Base size for importance: 2671, 3403 (half sample for Q1 and Q4 of 2007 and half sample for all of 2008)
Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jul, Oct 07, Jan, Apr, Jul, Oct 08)
BBC1 = 2367, 4850 BBC2 = 1097, 2334 ITV1 = 1752, 3587 (statement added in Q307)
Source: Ofcom PSB Tracker, GfK NOP

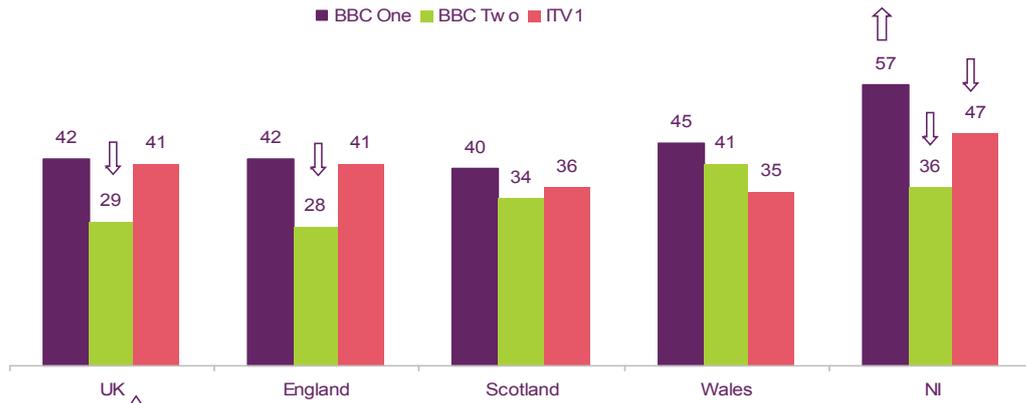
Figure 6.7 shows viewers' ratings of BBC One, BBC Two and ITV1⁸⁸ in non-News nations/regions programming in each of the nations in 2008. In England, BBC One (42%) and ITV1 (41%) were rated similarly by their regular viewers and tended to be rated more highly than BBC Two (28%). In Northern Ireland, BBC One (57%) gained the most positive

⁸⁸ Within the PSB Tracker, Channel 3 is more simply referred to as ITV1 for all respondents in all nations. Note: within Scotland Channel 3 is STV, within Northern Ireland Channel 3 is UTV and within Wales this is ITV1 Wales.

response on its non-News regional coverage by its regular viewers. In Wales, BBC One was also rated highly on the delivery of non-News nations/regions programming (with 45% of its regular viewers rating it highly). ITV1 Wales was not rated as highly as BBC One by its regular viewers in Wales (35%). In Scotland, the main three channels providing this type of content tended to be rated more similarly by regular viewers of each (BBC One 40%, BBC Two 34% and ITV1 36%).

Figure 6.7: Opinions on purpose 3: non-News nations/regions programmes, by nation

Aside from news, it provides a range of good quality programmes about my region, made for people in my region
 Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Shows when one channel is significantly different to two others ('10/9/8/7', 2008, 95% level)
 Base = Self-reported regular viewers of each channel in each nation; UK: 4850, 2334, 3587; England: 2759, 1371, 1941; Scotland: 687, 323, 508; Wales: 741, 357, 596; NI: 663, 283, 542
 Amalgamated data (Jan 08, April 08, July 08, Oct 08)
 Source: Ofcom PSB Tracker, GfK NOP

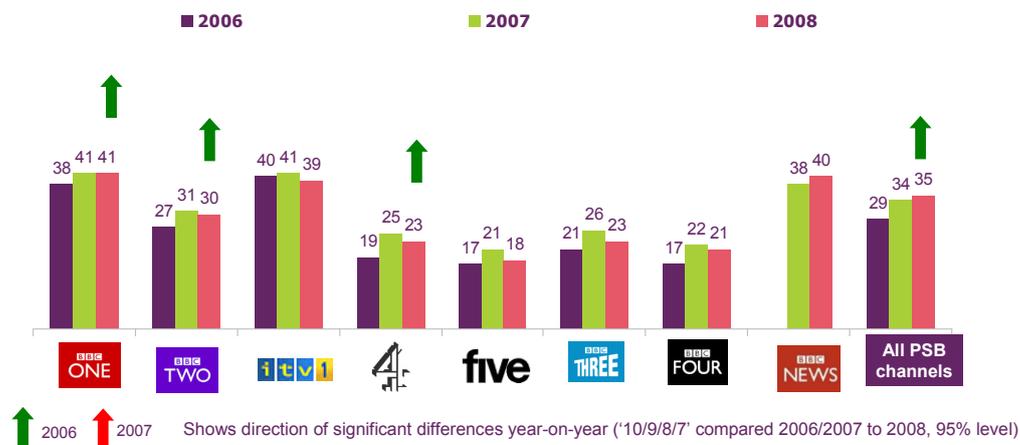
Portrayal of region to rest of UK

In 2008, as in previous years, ITV and BBC One scored more highly than the other channels on this element of Purpose 3; around four in ten of their regular viewers agreed that they *portray my regions/nation well to the rest of the UK* (see figure 6.8). BBC One, BBC Two and Channel 4 achieved a higher proportion of their regular viewer base who rated the channel highly on the *portrayal of the viewer's region to the rest of the UK* in 2008 than in 2006. However, it is important to remember that this element of the PSB purposes and characteristics is seen to be delivered well by a lower proportion in general.

Figure 6.8: Opinions on purpose 3: *portrayal of region to rest of UK*

It portrays my region / nation well to the rest of the UK

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317, BBC News = 533, 1507 (news added in Q307)

Source: Ofcom PSB Tracker, GfK NOP

Showing people from different parts of the UK

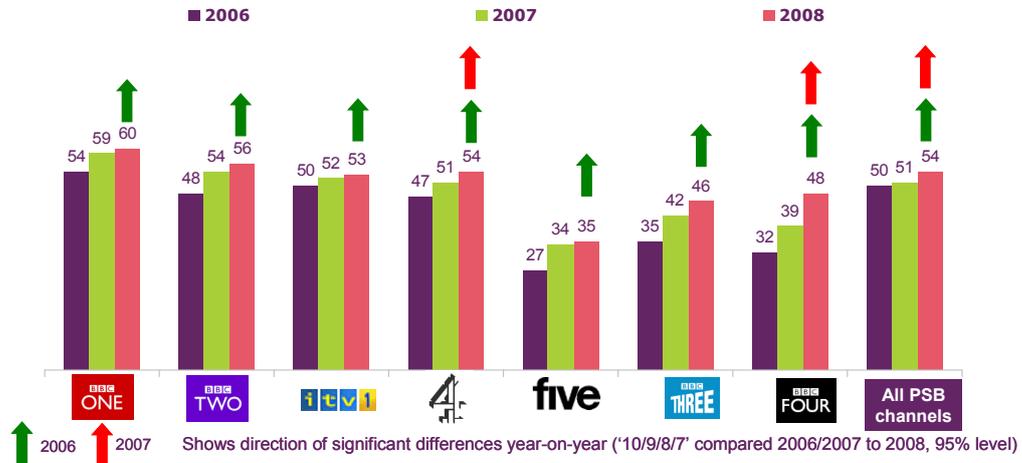
Figure 6.9 below shows the extent to which regular viewers of the PSB channels saw Entertainment and Factual programmes on the channels as involving *people from different parts of the UK*.

The broad picture shown by Figure 6.9 is that regular viewers of each of the PSB channels asked about had a stronger view that their programmes featured people from different parts of the UK in 2008, compared with 2006.

Of the five main PSB channels, only Five achieved less than 50% of its regular viewers' rating the channels highly on this measure – possibly a reflection of regular viewers' experiences of Five's non-UK originated programming. The BBC's Pulse data identified that this non-UK programming underpins much of the viewer experience of the channel; see section 8 on delivery of the PSB characteristics.

Figure 6.9: Opinions on purpose 3: reflecting UK cultural identity

Its entertainment and factual programmes show people from different parts of the UK
 Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317
 Source: Ofcom PSB Tracker, Gfk NOP

Section 7

PSB purpose 4: *representing diversity and alternative viewpoints*

Introduction

This chapter examines in detail PSB purpose 4, which is defined as:

To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere

This PSB purpose is not aligned to any one programme genre. However, there are a range of discrete programmes that may fit this PSB purpose, for example, particular types of social documentary, or programmes that reflect multicultural themes or represent diversity. Because of the range of programmes that fall within this area, there are no output data or viewing data (BARB) within this section.

Previously in the PSB Tracker, viewers rated channels on the statement *'its programmes show different kinds of cultures and opinions within the UK'*. However, in order to better understand viewers' opinions on this PSB Purpose, in July 2008 this statement was replaced by two separate statements pulling out the two elements of diversity. The newer research statements are therefore:

Its programmes show different kinds of cultures in the UK

Its programmes offer a range of opinions on subjects and issues

The section focuses on the five main PSB channels, plus BBC Three and BBC Four. This purpose is particularly linked to Channel 4's remit, as well as that of the BBC. Respondents are likely to have thought about a range of programme types when giving their views on how PSB channels deliver this element of PSB.

Summary findings

Audience impact

- Of the five main PSB channels, Channel 4 was the most likely to be rated highly on this by its regular viewers (56%) in terms of *showing different kinds of cultures in the UK* in 2008. Just over half of BBC One and BBC Two's regular viewers rated the channels highly on showing different UK cultures (both 51%). ITV1 and Five were less associated with this element of the PSB Purpose.
- BBC One (63%), BBC Two (63%), BBC News (67%) and BBC Four (60%) were the most likely to be rated highly in terms of *offering a range of opinions on subjects and issues* by their regular viewers. Around half of Channel 4's (54%) and ITV1's (49%) regular viewers rated the channels highly on having a *range of opinions on subjects and issues*.

Audience impact

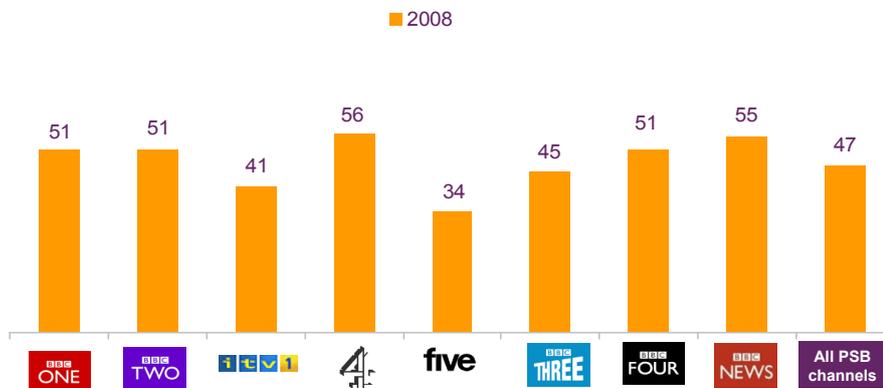
Perceived delivery of PSB statement

Figure 7.1 shows regular viewers' opinions on the channels' performance on *showing different kinds of cultures in the UK* in 2008. This identifies that of the five main PSB channels, Channel 4 was the most likely to be rated highly on this by its regular viewers (56%) while just over half of BBC One and BBC Two's regular viewers rated the channels highly on this (51% and 51%). ITV1 and Five are less associated with this element of the PSB purpose. Just over half of BBC Four and BBC News's regular viewers rated the channel highly against this statement.

Figure 7.1: Opinions on purpose 4: shows different kinds of cultures in the UK

Its programmes show different kinds of cultures in the UK

Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and 1 is the lowest



Base for 'all PSB channels': All respondents who ever watch any PSB channels, 3334 (Q3 and Q4 only)

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: July 08, Oct 08)

BBC1 = 2418, BBC2 = 1229, ITV1 = 1824, Channel 4 = 1138, five = 603, BBC3 = 267, BBC4 = 152, BBC News = 975

Figure 7.2 illustrates the profile of individuals who were regular viewers and rated the individual channels highly on this element of PSB delivery. This analysis allows us to make comparisons between channels, to identify which channels gained a higher proportion of those rating the channel highly falling in different demographic groups. Note: the actual proportion of the general population who rated the channels highly differs by channel and is not taken into account in this analysis.

This shows that those who rated Channel 4 and BBC Three highly on *showing different types of cultures* were more likely to be aged between 16 and 34 years old than those who rated any of the other channels highly on this measure (Channel 4: 48%, BBC Three: 59%).

Those who rated BBC One, BBC Two and Channel 4 highly on *showing different cultures* were more likely to be in the AB socio-economic groups than those rating ITV1, Five and BBC Three highly.

People who rated BBC Two and BBC News highly on *showing different types of cultures in the UK* were more likely to be skewed towards males (55% and 59% respectively) than were those who rated BBC One (46%), ITV1 (42%), Channel 4 (47%) and Five (42%) highly on this.

There were no significant differences between the proportions of those rating the channels highly who were from an ethnic minority group.

Figure 7.2: Profile of those who rated the channel highly: showing different kinds of cultures in the UK

% of those rating the channels highly that are in each subgroup	BBC ONE	BBC TWO	ITV1	4	five	BBC THREE	BBC FOUR	BBC NEWS
Total	1211	629	719	616	197	116	78	529
Male	46	55	42	47	42	54	50	59
Female	54	45	58	53	58	46	50	41
16-34	32	24	31	48	28	59	28	23
35-54	35	37	36	30	33	28	38	37
55+	33	38	33	22	39	14	34	40
AB	19	21	13	18	10	8	21	18
C1C2	50	51	49	52	54	62	45	54
DE	31	28	37	29	36	30	33	29
England	83	84	83	85	80	83	73	84
Scotland	9	9	8	8	12	10	17	8
Wales	5	5	6	3	5	5	6	5
N Ireland	3	3	3	4	3	2	4	3
White	95	96	95	96	94	97	92	93
MEG*	5	4	5	4	6	3	8	7

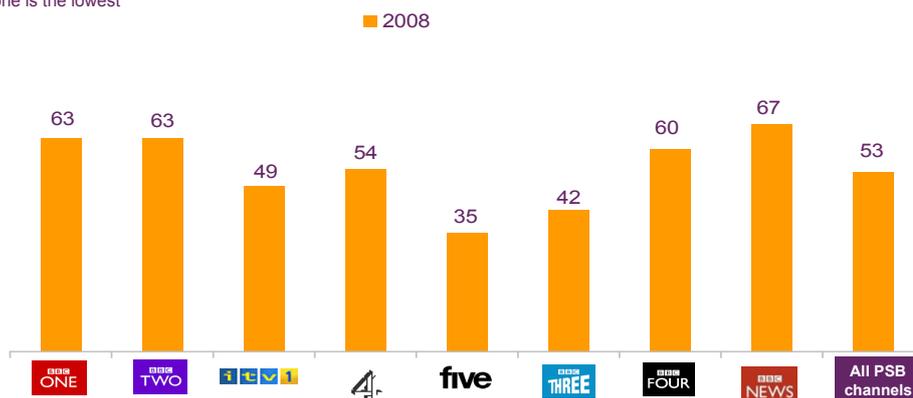
Base = Those claiming to be regular viewers and rating the particular channel as 7/8/9/10 out of 10 on the research statement (2008)
 Source: Ofcom PSB Tracker, Gfk NOP. Weighted %
 *MEG = minority ethnic groups

Figure 7.3 shows channels' performance on offering a range of opinions on subjects and issues in 2008. BBC One (63%), BBC Two (63%), BBC News (67%) and BBC Four (60%) were the most likely to be rated highly on this by their regular viewers. Around half of Channel 4's (54%) and ITV1's (49%) regular viewers rated the channels as delivering well against this, while fewer associated this with Five (35%) and BBC Three (42%).

Figure 7.3: Opinions on purpose 4: range of opinions on subjects and issues

Its programmes show a range of opinions on subjects and issues

Extent to which the purpose/characteristics applies to the channel(s), where 10 means is the highest score and one is the lowest



Base for 'all PSB channels': All respondents who ever watch any PSB channels, 3334 (Q3 and Q4 only)
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 08, April 08, July 08, Oct 08)
 BBC1 = 2418, BBC2 = 1229, ITV1 = 1824, Channel 4 = 1138, five = 603, BBC3 = 267, BBC4 = 152, BBC News = 975

Figure 7.4 shows the profile of individuals who were regular viewers and rated the individual channels highly on this element of PSB delivery. Note: the actual proportion of the general population who rated the channels highly differs by channel and is not taken into account in this analysis.

People who rated BBC News highly on *offering a range of opinions on issues* were more likely to contain a higher proportion of people from ethnic minority groups (9%) than those rating the other PSB channels highly on this.

Those who rated Channel 4 and BBC Three highly on *offering a range of opinions* were more likely to be aged between 16 and 34 years old than were those who rated any of the other channels highly on this measure (Channel 4: 45%, BBC Three: 56%).

Those who rated BBC One, BBC Two, BBC Four and Channel 4 highly on *offering a range of opinions on issues* were more likely to be in the AB socio-economic groups than those who preferred ITV1, Five and BBC Three. People who rated BBC Two highly on this were more likely to be male (55%) than were those who rated BBC One, ITV1, Channel 4 and Five on this statement.

Figure 7.4: Profile of those who rated the channel highly: *range of opinions on subjects and issues*

% of those rating the channels highly that are in each subgroup								
Total	1512	776	898	629	201	109	82	654
Male	47	55	41	46	40	48	47	57
Female	53	45	59	54	60	52	53	43
16-34	29	22	30	45	27	56	24	22
35-54	35	36	35	31	36	26	39	40
55+	35	42	35	24	37	17	37	39
AB	21	24	14	21	11	6	28	18
C1C2	49	48	49	51	54	54	40	54
DE	30	28	37	28	36	40	31	28
England	83	84	82	83	82	82	78	83
Scotland	9	8	8	10	11	10	14	9
Wales	5	5	6	4	5	5	6	5
N Ireland	3	3	4	4	3	3	2	3
White	95	97	95	95	95	97	93	91
MEG*	5	3	5	5	5	3	7	9

Base = Those claiming to be regular viewers and rating the particular channel as 7/8/9/10 out of 10 on the research statement (2008)

Source: Ofcom PSB Tracker, GfK NOP. Weighted %

*MEG = minority ethnic groups

Channel 4 Public Value Research

Channel 4 reported its own research in its 2008 Annual Report ⁸⁹.

Among other areas of particular relevance to the broadcaster, the report published findings relating to purpose 4 and diversity. These findings are included here because they cover slightly different aspects of diversity to those provided by the other studies in this report.

Within the research ⁹⁰, Channel 4 asked respondents to choose which of the five main PSB channels' research statements most apply to ⁹¹.

Channel 4's research found that Channel 4 was the channel (out of the five main PSB channels) that audiences were most likely to be associated with the following statements: '*caters for audiences other channels don't cater for*', '*allows people an alternative point of view*', '*shows the viewpoints of different ethnic groups*', '*shows the viewpoints of gays and lesbians*' and '*shows the viewpoints of disabled people*'.

⁸⁹ http://www.channel4.com/about4/pdf/2008/CH4_Report2008_Full.pdf

⁹⁰ See Channel 4's document explaining its research and methodology in more detail
http://www.channel4.com/about4/pdf/2008/CH4_Methodology_Document_2008.pdf

⁹¹ See Channel 4's document explaining its research and methodology in more detail
http://www.channel4.com/about4/pdf/2008/CH4_Methodology_Document_2008.pdf

Section 8

Public Service Broadcasting: characteristics

Introduction

This chapter reports on the PSB characteristics:

- *High quality – well funded and well produced*
- *Original – new UK content, rather than repeats or acquisitions*
- *Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones*
- *Challenging – making viewers think*
- *Engaging – remaining accessible and attractive to viewers*

'Trust' was added as an extra dimension to be reported on alongside the PSB characteristics. This was included as a statement in the 2007 PSB Tracker survey in order to monitor the extent to which people trust the main PSB channels as the digital TV environment expands. The statement was also included partly as a result of the issues surrounding phone votes within programmes on the PSB channels, and in order to understand people's opinions of the channels after this issue was resolved.

Due to the less tangible nature of the PSB characteristics, this section focuses mainly on viewer opinions gathered through the PSB Tracker and the BBC-GfK Pulse survey, rather than viewing or output information relating to particular genres.

The two exceptions to this are *Engaging*, which includes viewing figures of the programmes gaining the largest average audiences, and *Original*, which includes output hours showing the amounts of originated content broadcast.

Some of the PSB characteristics apply particularly to certain channels. *Innovation* is a key element of Channel 4's remit, and ITV1 and Five have a particular goal to provide *quality* UK productions.

Summary findings

High quality

- Regular viewers' ratings of the channels on *showing well-made high quality programmes* have shown significant increases for all individual channels except Five since 2007. In 2008, around 8 in 10 regular viewers of BBC One and BBC Two rated those channels highly in terms of the *quality* of their programming. Around two-thirds of Channel 4's and ITV1's regular viewers saw the channels as delivering well in this area. Channel Five continued to receive the smallest portion of positive ratings in terms of it having *high quality* programmes.

- Pulse data also show that, of all the responses to programmes on each of the five main PSB channels, over 8 in 10 rated them as *high quality*. However, of those seen as *high quality* it is interesting to note that 60% of Five's programme responses and 16% of Channel 4's were not UK-generated; significantly more than for BBC One, BBC Two and ITV1. In addition, some genres tend to make larger contributions to these positive responses for the different channels:
 - BBC One: News, Drama, Other Factual, Soaps
 - BBC Two: Other Factual, Entertainment, Specialist Factual
 - ITV1: Soaps, Entertainment, Drama,
 - Channel 4: Other Factual, Entertainment
 - Five: Drama, Other Factual, Soaps

Trust

- Of the five main PSB channels, BBC One and BBC Two remained as the channels most likely to be seen as *trustworthy* by their regular viewers in 2008 (72% and 76% respectively). ITV1 and Channel 4 were seen as *trustworthy* to a similar extent by around 6 in 10 viewers. Channel Five rated the lowest of all the channels on this characteristic, but 45% of its viewers still trusted the channel. BBC News was also trusted by a high proportion of its regular viewers (77%), while 67% rated BBC Four and 59% rate BBC Three as *trustworthy*.
- Since 2007, only BBC Two has increased the proportion of its regular viewers saying that *they trust the channel*.

Innovative

- All of the channels showed increases in the measure of *innovation* in 2008 since 2006 or 2007. Of the five main PSB channels, Channel 4 in particular strengthened its ratings among its regular viewers in 2008 and was seen as leading on this measure (59%), ahead of BBC Two (56%).
- BBC Three and BBC Four also improved against this measure and in 2008 over half of their regular viewers rated the channels highly on *showing programmes with new ideas and different approaches* (52% and 57% respectively).
- BBC Pulse data shows that in 2008 programme responses for BBC Two (83%) Channel 4 (78%) and Five (75%) were most likely to indicate that the programmes were considered to be original and different. Seventy per cent of BBC One's programme responses agreed that the programme was innovative, as did 65% of ITV1's programme responses.

Challenging

- Of the five main channels, Channel 4 in particular strengthened its ratings among its regular viewers in 2008 on the measure of *challenging – shows programmes that make me stop and think* (from 56% in 2007 to 63% in 2008). This positive shift brought Channel 4 more in line with the opinions given by regular viewers of BBC Two (67%).
- Of the digital channels, BBC Four and BBC News were particularly highly rated on this, with around two-thirds of their regular viewers rating the channels highly on this

(66% and 65% respectively). All channels except BBC News saw increases in their ratings on this characteristic when comparing 2008 with 2006.

- Pulse data shows that around two-thirds of responses to programmes on BBC Two and Five showed that the programmes was thought to be *thought-provoking*, driven by Other Factual and Entertainment on both channels and by Specialist Factual to a lesser extent on BBC Two. Around 6 in 10 programme responses agreed that the programmes were *challenging* on Channel 4 (60%) and BBC One (62%), while just over half (53%) of programmes on ITV1 were rated as such.

Engaging

- Around half of BBC One's (52%) and BBC Two's (55%) regular viewers saw the channels as *reflecting the interests and concerns of people like me*. ITV1 (46%) and Channel 4 (49%) received similar levels of positive opinion in this area. Five received the lowest ratings in this area, with 30% of its regular viewers feeling that the channel *reflected their concerns and interests*. All channels except BBC News saw increases in their ratings on this characteristic when comparing 2008 with 2006, and BBC Four also improved against this measure since 2007.
- In 2008 around 6 in 10 regular viewers of most of the channels gave them a rating of 7-10 out of 10 in relation to *having programmes they wanted to watch*. Five was the exception, as half of its regular viewers felt it *showed programmes they wanted to watch*.

Original

- The *Second Review of PSB* identified that UK-originated programming is a priority for audiences, but that the PSB broadcasters were under pressure in the digital environment and in the current economic climate. The volume of first-run originated programmes on the five main channels in 2008 was 33,177 hours a year; a slight decrease on levels seen in 2004 (by 1,099 hours or a 3% reduction).
- Since 2007, two channels have increased the proportion of their regular viewers rating them highly on having *enough new UK-originated programming*: Channel 4 and BBC Three. For most other channels: BBC One, BBC Two, ITV1, Five and BBC Four, increases in this measure were seen from 2006 to 2007.
- In 2008, just over half of all regular viewers of BBC One, BBC Two, BBC Three, BBC Four and BBC News gave the channels a score of 7-10 out of 10 on this aspect of the PSB characteristics. Around one-quarter (26%) of Five's regular viewers rated the channel positively on this statement, possibly because regular viewers were conscious of its levels of acquired overseas programming.
- Analysis of Pulse data shows that for Five, and to a lesser extent for Channel 4, more positive programme responses were triggered by programmes made *outside* the UK than was the case for programmes on BBC One, BBC Two and ITV1.
- Analysis of Pulse data on audience opinions of UK-made programming only finds that the responses to the *quality* of Five's UK-made programmes was not quite as high as responses on the total range of programmes watched (84% vs. 87%). Conversely, for UK-originated programmes on Five and Channel 4, responses to the measures of *challenging* and *inspiring* were higher than responses to their overall repertoires of programmes.

Sub-group analysis

- We analysed the PSB Tracker data on the profile of regular viewers who rated the individual channels highly on each of the PSB purposes and characteristics⁹². This identified a similar picture across many of the purposes and characteristics; the key findings are outlined below:
 - Those who positively rated ITV1 and Five tended to be more likely to be female than those who rated the other channels highly.
 - Those who rated BBC Two, BBC News, and to a lesser extent BBC Four, highly were more likely to be male than those who rated other channels highly.
 - Those who rated Channel 4, and BBC Three highly were more likely to be aged 16 – 34 than those rating other channels highly.
 - Those who rated BBC One, BBC Two, Channel 4, BBC Four and BBC News highly tended to be more likely to be in the AB socio demographic groups than those rating other channels highly.
 - Among those rating the channels highly, Five, BBC News, and to lesser extent Channel Four, tended to be more likely to have a higher proportion of people from ethnic minority groups than some other channels e.g. BBC Two and ITV1.

PSB Tracker

The PSB Tracker survey used the following statements to explore respondents' views of the PSB characteristics:

"It shows well-made, high quality programmes"

"I trust this channel"

"It shows enough new programmes made in the UK"

"It shows programmes with new ideas and different approaches"

"It shows programmes that make me stop and think"

"It shows programmes I want to watch"

"Its programmes reflect the interests and concerns of people like me"

⁹² This analysis allows us to make comparisons between channels, to identify which channels gained a higher proportion of those rating the channel highly falling in different demographic groups. Note: the actual proportion of the general population who rated the channels highly differs by channel and is not taken into account in this analysis.

Quality - It shows well-made, high quality programmes

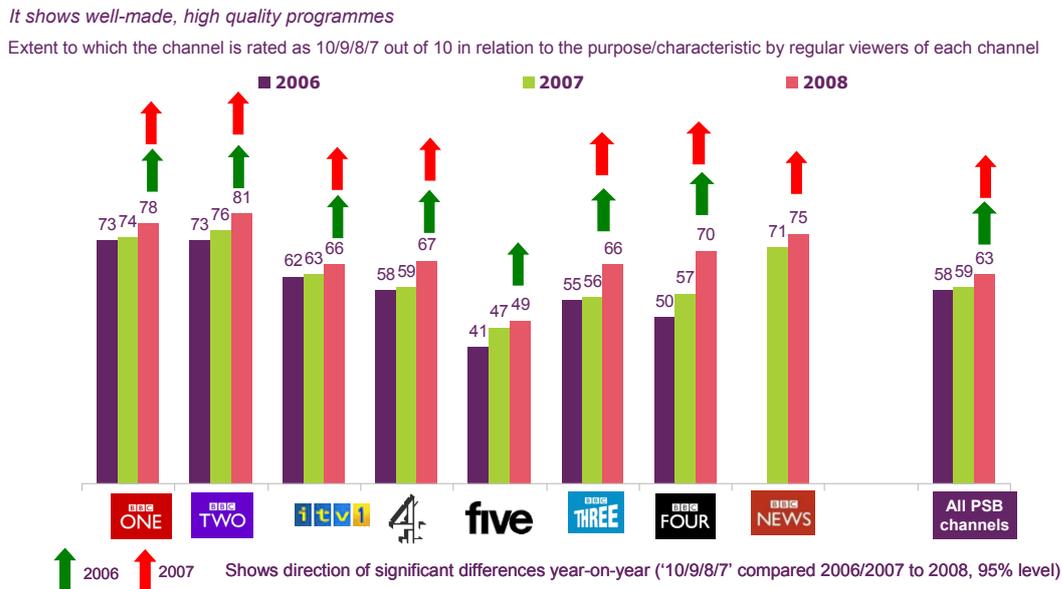
Audience impact

The PSB Tracker asked regular viewers of each channel to what extent the statement ‘it shows well-made high-quality programmes’ applied to each channel separately and to what extent it applied to the PSB channels collectively. Responses are shown in Figure 8.1.

Looking at channels individually, around 8 in 10 of regular viewers of BBC One and BBC Two rated those channels highly in terms of the *quality* of their programming. Around two-third of Channel 4 and ITV1’s regular viewers saw the channels as delivering well in this area. Channel Five continued to receive the smallest portion of positive ratings in terms of it having *high quality* programmes.

This measure of *quality* has seen significant increases for all individual channels except Five since 2007. In 2007 we saw that Five and BBC Four in particular, improved on this measure.

Figure 8.1: PSB Tracker: viewer opinions of high quality programmes



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798
Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317, BBC News = 796, 1507,

Pulse survey data

Respondents to the Pulse survey⁹³ were asked to score the following statement about all the programmes they had watched:

“This was a high quality programme”

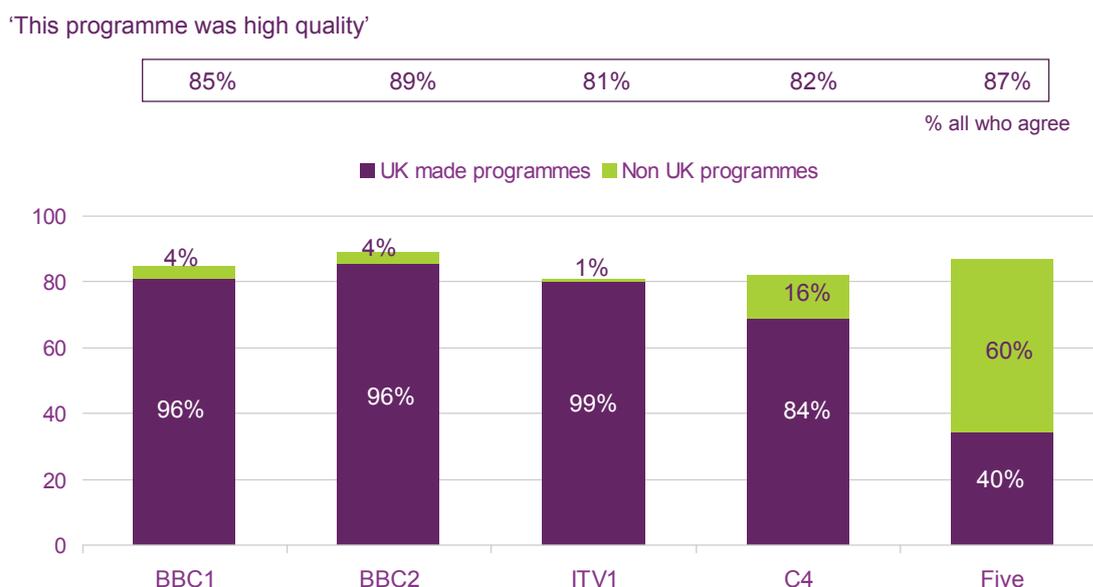
⁹³ Pulse data are not comparable with the data on quality gathered in the PSB Tracker, due to methodological differences, so direct comparisons should not be made. The PSB Tracker asks about opinions on the whole array of programmes available, and therefore includes programmes and genres that the respondents are not interested in or may dislike, whereas the Pulse survey asks about the quality of viewed programmes only; i.e. those that the viewer chose to watch.

Responses to this programme-specific question were then aggregated in order to provide an insight into channel delivery on these statements. One viewer may therefore give opinions on more than one programme, as well as multiple episodes within a series. Respondents who participate in the Pulse survey rate programmes which they had themselves chosen to watch, and so high levels of agreement with these statements may be expected.

Pulse data from 2008⁹⁴ is reported here on the agreement that each programme was *high quality*. It also shows what proportion of the programmes that viewers agreed were *high quality* was made in the UK, or made elsewhere. This shows that over 8 in 10 of all responses to programmes on the main PSB channels indicated that the programmes were thought to be *high quality* – especially those on BBC Two. Five’s programmes were also very likely to be rated as *high quality*. Given Five’s schedule, it is perhaps unsurprising that a large proportion of the programmes which viewers agreed were high quality were made outside the UK (60%); higher than for the other channels. Just under 1 in 6 (16%) of all programmes that viewers agreed were high quality on Channel 4 were made outside the UK.

The proportion of responses for programmes that were rated as *high quality* in 2008 has not changed by more than 1% for any channel since 2007.

Figure 8.2: Pulse survey opinions – High quality programmes, UK vs. non-UK programmes



Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All programmes excluding children and PPB genres
 Base: BBC1 996682, BBC2 255077, ITV1 620299, C4 260965, Five 134299

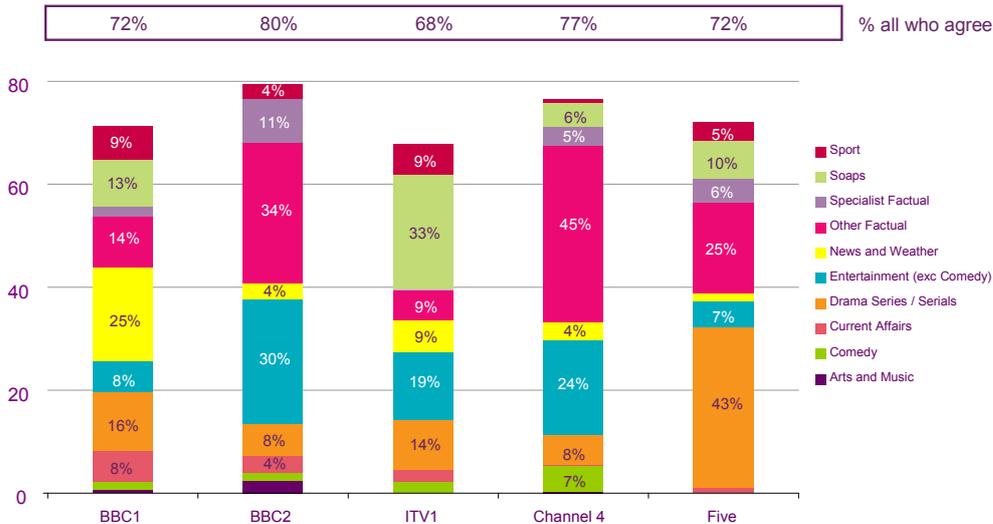
Figure 8.3 shows the proportion by genre of those programmes on each channel that viewers agreed were *high quality*. This also indicates the genres that tended to make a greater contribution to these ratings for the different channels:

⁹⁴ In the Pulse survey, programmes are aggregated by genre lists in accordance with Broadcasting Dataservices' (BDS) classifications. This differs from BARB and broadcaster returns' genre classification. Initially therefore genres are not directly comparable. In previous PSB Annual Reports the BDS Specialist Factual genre was amended by Ofcom to more closely fit the BARB and broadcaster returns' classifications. However, for the analysis of 2008 Pulse data GfK NOP worked to overlay the BARB genre classifications onto the Pulse data to give data that is as comparable as possible with the other data sources reported within this report. Therefore within this report, the Figures showing Pulse data analysis by genres show 2008 data only.

- BBC One: News and weather (25%), Drama Series and Serials (16%), Other Factual (14%), Soaps (13%)
- BBC Two: Other Factual (34%), Entertainment (30%), Specialist Factual (11%)
- ITV1: Soaps (33%), Entertainment (19%), Drama Series and Serials (14%)
- Channel 4: Other Factual (45%), Entertainment (24%)
- Five: Drama Series and Serials (43%), Other Factual (25%), Soaps (10%)

Figure 8.3: Pulse survey opinions – High quality programmes, contribution of genres

'I would talk about this programme with my friends' - % contribution by genre



Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All programmes excluding Children, Film and PPB genres
 Base: BBC1 996123, BBC2 255121, ITV1 620713, C4 261420, Five 134341

Trust - I trust this channel

Audience impact

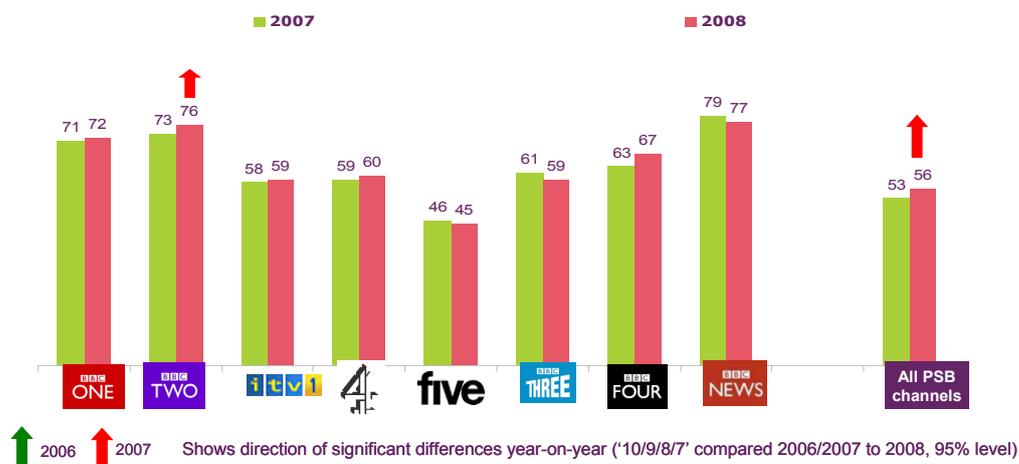
Figure 8.4 shows the extent to which regular viewers trust the PSB channels. Of the five main PSB channels, BBC One and BBC Two remain the channels most likely to be seen as *trustworthy* by their regular viewers (72% and 76% respectively). ITV1 and Channel 4 were seen as *trustworthy* to a similar extent by around 6 in 10 viewers. Channel Five was rated the lowest of all the channels on this characteristic, but 45% of its viewers still trusted the channel. BBC News was also trusted by a high proportion of its regular viewers (77%), while 67% rated BBC Four and 59% rated BBC Three as *trustworthy*.

Since 2007, only BBC Two has gained a higher proportion of its regular viewers saying that *they trust the channel*.

Figure 8.4: PSB Tracker: trust in PSB channels

I trust this channel

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 1788, 6798

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317, BBC News = 796, 1507

Innovation - It shows programmes with new ideas and different approaches

Audience impact

New ideas and different approaches

Figure 8.5 shows regular viewers' opinions about the extent to which channels show 'programmes with new ideas and different approaches'.

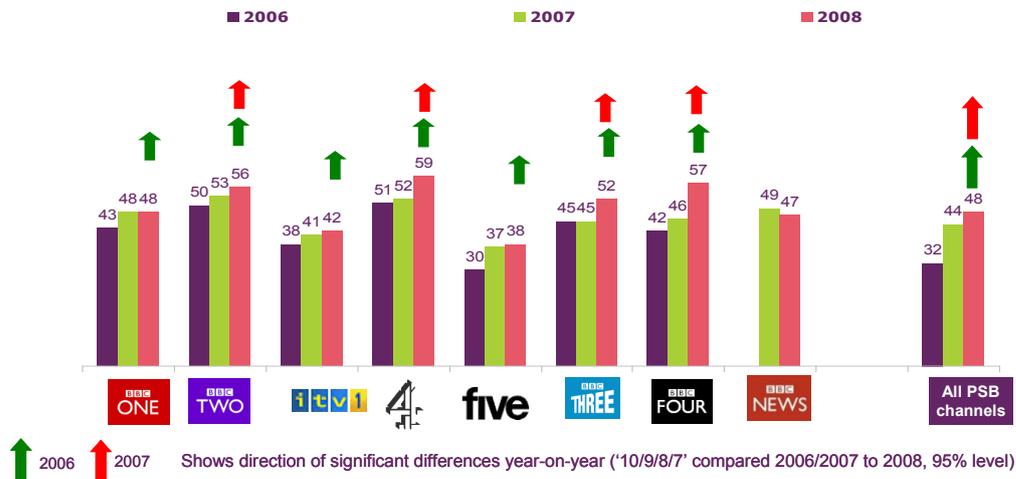
All of the channels have seen increases on the measures of *innovation* since 2006 or 2007. Of the five main PSB channels, Channel 4 in particular strengthened its ratings among its regular viewers in 2008 and was seen as leading on this measure by regular viewers (59%); ahead of BBC Two (56%).

BBC Three and BBC Four have also seen increases on this measure and over half of their regular viewers in 2008 rated the channels well on *showing programmes with new ideas and different approaches* (52% and 57% respectively).

Figure 8.5: Innovation: audience views

It shows programmes with new ideas and different approaches

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317, BBC News = 796, 1507

Pulse survey data

In the Pulse survey⁹⁵, which asks people their opinions of particular programmes, respondents were asked whether they agreed or disagreed with the following statement relating to innovation:

This programme felt original and different from most other TV programmes I've seen

Responses to this programme-specific question were then aggregated in order to provide an insight into channel delivery on these statements. One viewer may therefore give opinions on a more than one programme, as well as multiple episodes within a series. It should be noted that respondents who participated in the Pulse survey rated programmes which they had themselves chosen to watch, and so high levels of agreement with these statements may be expected.

Figure 8.6 shows Pulse data from 2008⁹⁶ on the proportion by genre for those programmes that viewers agreed were *original and different*. Programmes on BBC Two (83%) Channel 4 (78%) and Five (75%) were most likely to be considered *original and different* by their

⁹⁵ Pulse data are not comparable with the data on quality gathered in the PSB Tracker, due to methodological differences, so direct comparisons should not be made. The PSB Tracker asks about opinions on the whole array of programmes available, and therefore includes programmes and genres that the respondents are not interested in or may dislike, whereas the Pulse survey asks about the quality of viewed programmes only; i.e. those that the viewer chose to watch.

⁹⁶ In the Pulse survey, programmes are aggregated by genre lists in accordance with Broadcasting Dataservices' (BDS) classifications. This differs from BARB and broadcaster returns' genre classification. Initially therefore genres are not directly comparable. In previous PSB Annual Reports the BDS Specialist Factual genre was amended by Ofcom to more closely fit the BARB and broadcaster returns' classifications. However, for the analysis of 2008 Pulse data GfK NOP worked to overlay the BARB genre classifications onto the Pulse data to give data that is as comparable as possible with the other data sources reported within this report. Therefore within this report, the Figures showing Pulse data analysis by genres show 2008 data only..

viewers. Seventy per cent of BBC One's programmes were thought to be *innovative*, as were 65% of ITV1's programmes. Looking back at Pulse ratings for 2007 shows that most channels have increased the positive response among viewers for this measure in 2008.

This also shows that a wide variety of programme types can contribute to agreement that a channel is thought to be *original and different*. In particular, positive responses were derived from Drama series serials (Five and BBC One), Other Factual (Channel 4, BBC Two, Five, BBC One), Entertainment (BBC Two, Channel 4, ITV1) and Soaps (ITV1, BBC One).

Figure 8.6: Pulse survey opinions – Innovation, contribution of genres

'This programme was original and different' - % contribution by genre



Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All programmes excluding Children, PPB, News & Film genres
 Base: BBC1 611121, BBC2 202098, ITV1 465447, C4 204643, Five 106491

Challenging - It shows programmes that make me stop and think

Audience impact

Challenging programmes

Figure 8.7 shows regular viewers' opinions about the extent to which channels show 'programmes that make me stop and think'.

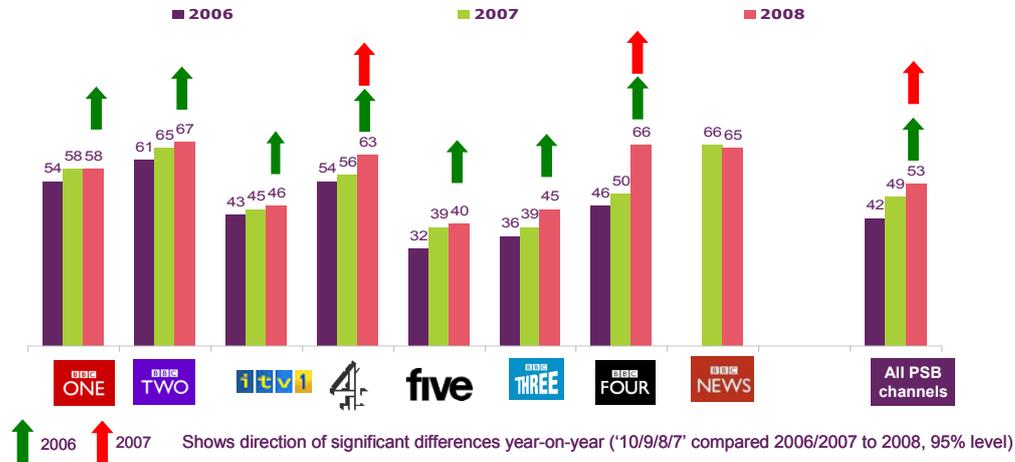
Of the five main channels, Channel 4 in particular strengthened its ratings among its regular viewers in 2008 on this measure of *challenging – shows programmes that make me stop and think* (from 56% in 2007 to 63% in 2008). This positive shift brought Channel 4 more in line with the opinions given by regular viewers of BBC Two (67%) in 2008.

Of the digital channels, BBC Four and BBC News were particularly highly rated on this; with around two-thirds of their regular viewers rating the channels highly (66% and 65% respectively). All channels except BBC News saw increases in their ratings on this characteristic when comparing 2008 with 2006.

Figure 8.7: Challenging: audience views

It shows programmes that make me stop and think

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317, BBC News = 796, 1507

Pulse survey data

In the Pulse survey⁹⁷, which asks people their opinions of particular programmes, respondents were asked whether they agreed or disagreed with the following statement relating to content being *challenging*:

"This programme was thought-provoking"

Responses to this programme-specific question were then aggregated in order to provide an insight into channel delivery on this statement. One viewer may therefore give opinions on a more than one programme as well as multiple episodes within a series. It should be noted that respondents who participated in the Pulse survey rated programmes which they had themselves chosen to watch, and so high levels of agreement with these statements may be expected.

Pulse data from 2008⁹⁸ is reported here on whether viewers agreed that each programme was *thought-provoking*, and shows what genres contributed most to this measure. Around two-thirds of responses to programmes on BBC Two and Five were in agreement that their

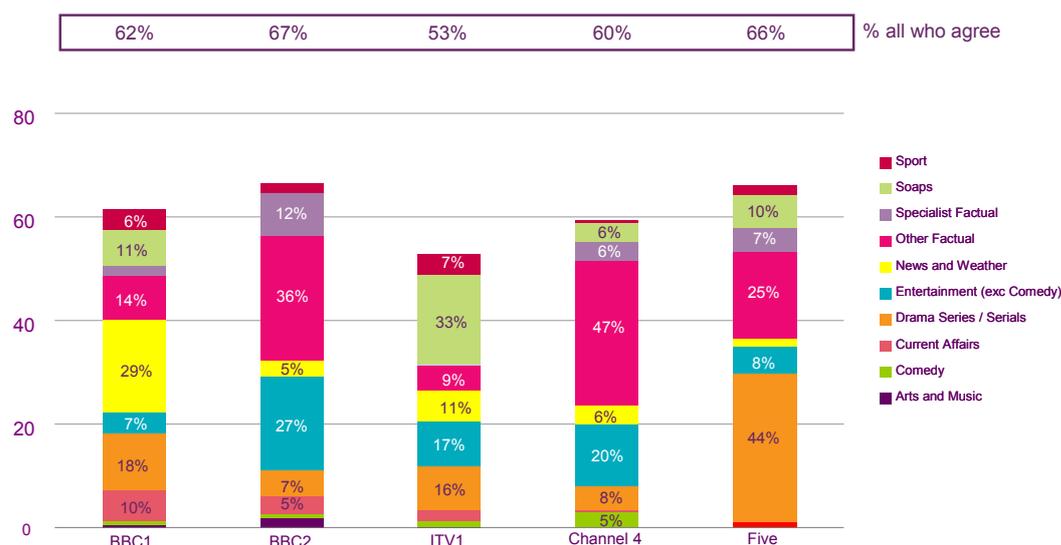
⁹⁷ Pulse data are not comparable with the data on quality gathered in the PSB Tracker, due to methodological differences, so direct comparisons should not be made. The PSB Tracker asks about opinions on the whole array of programmes available, and therefore includes programmes and genres that the respondents are not interested in or may dislike, whereas the Pulse survey asks about the quality of viewed programmes only; i.e. those that the viewer chose to watch.

⁹⁸ In the Pulse survey, programmes are aggregated by genre lists in accordance with Broadcasting Dataservices' (BDS) classifications. This differs from BARB and broadcaster returns' genre classification. Initially therefore genres are not directly comparable. In previous PSB Annual Reports the BDS Specialist Factual genre was amended by Ofcom to more closely fit the BARB and broadcaster returns' classifications. However, for the analysis of 2008 Pulse data GfK NOP worked to overlay the BARB genre classifications onto the Pulse data to give data that is as comparable as possible with the other data sources reported within this report. Therefore within this report, the Figures showing Pulse data analysis by genres show 2008 data only.

viewers found the programmes to be thought-provoking. This was driven by Other Factual and Entertainment on both channels and also by Specialist Factual on BBC Two. Around 6 in 10 responses to programmes said that the programmes were seen as challenging on Channel 4 (60%) and BBC One (62%), while just over half (53%) of responses to programmes on ITV1 were rated as such. Looking back at Pulse results in 2006 shows that most channels increased the positive response among viewers for this measure in 2008.

Figure 8.8: Pulse survey opinions – Challenging, contribution of genres

‘This programme was thought provoking’ - % contribution by genre



Source: BBC Pulse Survey/GfK NOP, Jan-Dec 2008, All programmes excluding Children, PPB & Film genre
 Base: BBC1 996074, BBC2 255360, ITV1 619842, C4 261088, Five 134227

Engaging – programmes I want to watch, programmes that reflect the interests and concerns of people like me

‘Engaging’ in this context means the provision of programming that is accessible and attractive to viewers.

Viewing figures

The top 15 programmes viewed on each channel during 2008 are listed in Figure 8.9, to provide an illustration of the types of *engaging* content that PSB broadcasters provide.

Analysis of this data shows that programmes in the ‘top 30’ programmes across any the channels were more likely to fall into the categories of Entertainment (11) or Drama Series/Serials (9) and were all shown on BBC One or ITV1.

The top programmes on BBC One were dominated by Entertainment, Drama and Sport, while ITV1’s top programmes were dominated by Entertainment and Drama. The top programmes on BBC Two and Channel 4 often fell into the Documentaries and Hobbies/Leisure genres. Five’s list of most viewed programmes tended to include Drama, Documentaries and Films.

The top programmes watched on BBC Three in 2008 tended to be Films (7 out of 15), whereas in 2007 the top programmes on this channel tended to be Drama and Documentaries. BBC Four’s top programmes were most likely to fall in the Documentaries genre.

Figure 8.9: Top 15 programmes by audience size, by channel for 2008

BBC One

Title	Date	Day	Start time	Duration	Genre	000s
WALLACE AND GROMIT: A MATTER OF LOAF AND DEATH	25/12/2008	Thursday	20:35:49	00:30:13	Entertainment: Animation Puppet	16152
DOCTOR WHO	25/12/2008	Thursday	18:00:28	01:00:30	Drama: Series UK	13098
STRICTLY COME DANCING	20/12/2008	Saturday	21:08:35	01:03:48	Entertainment: Family Shows	12966
EASTENDERS	24/03/2008	Monday	19:59:22	00:29:58	Drama: Soaps UK	11730
THE ROYLE FAMILY	25/12/2008	Thursday	21:38:05	00:58:11	Entertainment: Situation Comedy UK	10600
ANTIQUES ROADSHOW	16/11/2008	Sunday	19:14:09	00:58:52	Hobbies/Leisure: General	10112
CHILDREN IN NEED 2008	14/11/2008	Friday	19:00:00	03:00:53	Entertainment: Special Events	9829
NEW TRICKS	18/08/2008	Monday	21:01:46	00:57:24	Drama: Series UK	9364
BBC NEWS	25/12/2008	Thursday	17:47:15	00:10:08	News: National	9338
THE APPRENTICE	11/06/2008	Wednesday	20:59:42	00:59:48	Documentaries: Factual Entertainment	9292
MATCH OF THE DAY	06/02/2008	Wednesday	19:31:00	02:28:02	Sport: Football	9178
EURO 2008: MATCH OF THE DAY LIVE	29/06/2008	Sunday	18:56:35	03:17:29	Sport: Football	8844
WIMBLEDON 2008	30/06/2008	Monday	20:31:35	01:04:55	Sport: Tennis	8798
CASUALTY	02/02/2008	Saturday	20:21:42	00:47:56	Drama: Series UK	8467
MATCH OF THE DAY LIVE	16/02/2008	Saturday	18:14:36	01:12:25	Sport: Football	8154

BBC Two

Title	Date	Day	Start time	Duration	Genre	000s
TOP GEAR	02/11/2008	Sunday	20:00:29	01:01:02	Hobbies/Leisure: General	7745
TOP GEAR VIETNAM SPECIAL	28/12/2008	Sunday	19:59:18	01:13:39	Hobbies/Leisure Pursuits: Automotive	6704
LOUIS THEROUX: BEHIND BARS	13/01/2008	Sunday	21:10:48	00:59:00	Documentaries: Human Interest	5812
MASTERCHEF	28/02/2008	Thursday	20:00:48	00:58:58	Hobbies/Leisure: Cookery	5469
THE APPRENTICE - YOU'RE FIRED!	11/06/2008	Wednesday	22:00:59	00:39:56	Documentaries: Factual Entertainment	4830
TOP GROUND GEAR FORCE	14/03/2008	Friday	22:01:26	00:37:05	Entertainment: Special Events	4747
QI	14/11/2008	Friday	22:02:05	00:28:46	Entertainment: Quiz Shows/Panel Games	4609
HEROES	24/04/2008	Thursday	21:01:29	00:50:20	Drama: Serials Non-UK	4295
WIMBLEDON 2008	02/07/2008	Wednesday	17:50:05	01:10:04	Sport: Tennis	4271
SPRINGWATCH	26/05/2008	Monday	20:02:30	00:59:01	Hobbies/Leisure: Gardening	4259
TORCHWOOD	16/01/2008	Wednesday	21:02:16	00:47:25	Drama: Series UK	4219
DELIA	10/03/2008	Monday	20:32:25	00:28:51	Hobbies/Leisure: Cookery	4028
THE HAIRY BAKERS	18/08/2008	Monday	20:30:55	00:29:16	Hobbies/Leisure: Cookery	3997
THREE MEN IN ANOTHER BOAT	02/01/2008	Wednesday	21:02:20	00:58:46	Documentaries: Factual Entertainment	3964
DRAGONS' DEN	01/09/2008	Monday	21:01:59	00:59:18	Documentaries: Factual Entertainment	3954

ITV1

Title	Date	Day	Start time	Duration	Genre	000s
THE X FACTOR RESULTS	13/12/2008	Saturday	21:45:10	01:06:15	Entertainment: Family Shows	14062
BRITAIN'S GOT TALENT FINAL RESULT	31/05/2008	Saturday	21:31:10	00:28:15	Entertainment: Special Events	13884
THE X FACTOR	13/12/2008	Saturday	19:09:00	01:33:00	Entertainment: Family Shows	13766
CORONATION STREET	18/01/2008	Friday	19:33:00	00:26:24	Drama: Soaps UK	13021
DANCING ON ICE	16/03/2008	Sunday	18:59:15	01:59:30	Entertainment: Family Shows	12083
BRITAIN'S GOT TALENT	30/05/2008	Friday	21:01:20	01:29:15	Entertainment: Family Shows	11859
I'M A CELEBRITY - GET ME OUT OF HERE!	29/11/2008	Saturday	21:14:00	00:59:22	Documentaries: Factual Entertainment	10192
UEFA CHAMPIONS LEAGUE LIVE	21/05/2008	Wednesday	19:00:20	04:10:50	Sport: Football	10052
GRAND PRIX	02/11/2008	Sunday	16:05:15	03:11:30	Sport: Motor Racing	9075
DANCING ON ICE - THE SKATE OFF	09/03/2008	Sunday	20:30:40	00:28:14	Entertainment: Family Shows	8913
LEWIS	24/02/2008	Sunday	21:04:05	01:53:02	Drama: Series UK	8898
EMMERDALE	02/01/2008	Wednesday	18:59:25	00:26:35	Drama: Soaps UK	8854
THE GIRLS ALOUD PARTY	13/12/2008	Saturday	20:44:04	00:57:00	Entertainment: Family Shows	8645
WILD AT HEART	02/03/2008	Sunday	19:33:35	00:54:25	Drama: Series UK	8585
A TOUCH OF FROST	19/10/2008	Sunday	21:04:53	01:53:47	Drama: Series UK	8518

Channel 4

Title	Date	Day	Start time	Duration	Genre	000s
PETER KAYS BRITAIN'S GOT THE POP FACTOR	12/10/2008	Sunday	19:58:36	01:09:24	Entertainment: Other Comedy	6255
FILM: ELF (2003)	14/12/2008	Sunday	18:19:00	01:40:15	Films: Cinema Miscellaneous	5647
BIG BROTHER	05/06/2008	Thursday	21:02:05	01:33:05	Documentaries: Factual Entertainment	5595
GRAND DESIGNS	13/02/2008	Wednesday	21:01:30	01:00:11	Hobbies/Leisure: DIY	5453
BIG BROTHER:WHAT THE HOUSEMATES DID NEXT	05/09/2008	Friday	21:59:50	00:58:52	Documentaries: Human Interest	5169
HALF TON MUM	02/01/2008	Wednesday	21:03:02	00:59:24	Documentaries: Science/Medical	4766
THE SECRET MILLIONAIRE	19/08/2008	Tuesday	21:01:44	01:00:18	Documentaries: Human Interest	4675
GORDON RAMSAY: COOKALONG LIVE	18/01/2008	Friday	21:00:00	01:01:51	Hobbies/Leisure: Cookery	4432
FILM: MIRACLE ON 34TH STREET (1994)	07/12/2008	Sunday	18:21:30	02:03:10	Films: Cinema US	4205
RELOCATION, RELOCATION	16/01/2008	Wednesday	19:59:03	00:59:35	Hobbies/Leisure Pursuits: Lifestyle - Ho	4203
RAMSAY'S KITCHEN NIGHTMARES USA	13/02/2008	Wednesday	22:03:41	00:54:15	Documentaries: Factual Entertainment	4119
JAMIE'S FOWL DINNERS	11/01/2008	Friday	21:02:00	01:31:44	Documentaries: Human Interest	4045
JAMIE COOKS CHRISTMAS	18/12/2008	Thursday	21:01:20	00:59:54	Documentaries: Factual Entertainment	3976
GORDON RAMSEY'S F WORD	10/06/2008	Tuesday	21:02:00	00:59:55	Hobbies/Leisure: Cookery	3845
PETER KAY LIVE AT THE MANCHESTER ARENA	08/02/2008	Friday	21:00:18	00:59:31	Entertainment: Other Comedy	3727

Five

Title	Date	Day	Start time	Duration	Genre	000s
CSI: CRIME SCENE INVESTIGATION	12/02/2008	Tuesday	21:02:03	00:55:18	Drama: Series Non-UK	4359
CSI - NEW YORK	02/02/2008	Saturday	21:10:19	00:54:02	Drama: Series Non-UK	3754
EXTRAORDINARY PEOPLE: HALF MAN HALF TREE	14/04/2008	Monday	21:01:26	00:56:25	Documentaries: Science/Medical	3404
FILM: HELLBOY (2004)	17/08/2008	Sunday	20:54:15	01:18:33	Films: Cinema US	3199
FILM: HOME ALONE	07/12/2008	Sunday	17:12:35	01:49:27	Films: Cinema US	3031
CSI MIAMI	05/08/2008	Tuesday	21:02:07	00:54:29	Drama: Series Non-UK	2942
EXTRAORDINARY PEOPLE:...	21/08/2008	Thursday	21:02:50	00:57:02	Documentaries: Human Interest	2935
NCIS	07/03/2008	Friday	21:03:06	00:55:11	Drama: Series Non-UK	2819
ICE ROAD TRUCKERS	07/03/2008	Friday	20:00:56	00:56:51	Documentaries: Factual Entertainment	2739
HOUSE	10/04/2008	Thursday	21:02:48	00:54:38	Drama: Series Non-UK	2684
EXTRAORDINARY PEOPLE: THE WORLD'S HEAVIEST MAN	02/04/2008	Wednesday	21:02:43	00:55:49	Documentaries: Human Interest	2671
NEIGHBOURS	06/03/2008	Thursday	17:32:46	00:25:56	Drama: Soaps Non-UK	2623
FOOTBALL ON FIVE	27/11/2008	Thursday	19:59:29	02:16:17	Sport: Football	2603
FILM: MEN IN BLACK II (2002)	13/01/2008	Sunday	20:19:43	00:38:56	Films: Cinema US	2571
UEFA CUP: PSV EINDHOVEN V TOTTENHAM HOTSPUR	12/03/2008	Wednesday	19:30:00	03:11:41	Sport: Football	2557

BBC Three

Title	Date	Day	Start time	Duration	Genre	000s
GAVIN AND STACEY	16/03/2008	Sunday	21:02:00	00:28:13	Entertainment: Situation Comedy UK	1894
EASTENDERS	23/12/2008	Tuesday	22:04:10	00:29:08	Drama: Soaps UK	1568
FILM: INDIANA JONES AND THE LAST CRUSADE	30/03/2008	Sunday	19:02:08	01:57:15	Films: Cinema US	1539
DOCTOR WHO CONFIDENTIAL	05/07/2008	Saturday	19:44:35	00:43:16	Documentaries: Factual Entertainment	1459
FILM: SHREK 2 (2004)	25/05/2008	Sunday	19:47:43	01:21:41	Films: Cinema US	1456
HEROES	17/12/2008	Wednesday	22:01:59	00:41:19	Drama: Series Non-UK	1440
DOCTOR WHO	06/04/2008	Sunday	20:01:19	00:48:32	Drama: Series UK	1398
FILM: INDIANA JONES AND THE TEMPLE OF DOOM	23/03/2008	Sunday	19:10:25	01:48:41	Films: Cinema US	1361
FILM: BRUCE ALMIGHTY (2003)	21/12/2008	Sunday	20:02:03	01:31:33	Films: Cinema US	1285
SPOOKS	24/11/2008	Monday	22:31:19	00:59:32	Drama: Series UK	1213
FILM: RAIDERS OF THE LOST ARK (1981)	16/03/2008	Sunday	19:11:25	01:48:41	Films: Cinema US	1187
TORCHWOOD	27/02/2008	Wednesday	21:51:33	00:47:17	Drama: Series UK	1180
SPOOKS: CODE 9	10/08/2008	Sunday	21:02:22	00:44:51	Drama: Series UK	1027
FILM: MEET THE FOCKERS (2004)	05/07/2008	Saturday	21:25:58	01:49:13	Films: Cinema US	1001
FILM: ARMAGEDDON (1998)	12/08/2008	Tuesday	20:00:46	02:18:42	Films: Cinema US	999

BBC Four

Title	Date	Day	Start time	Duration	Genre	000s
THE CURSE OF STEPTOE	19/03/2008	Wednesday	21:00:25	01:06:46	Documentaries: Factual Entertainment	1625
IAN HISLOP GOES OFF THE RAILS	02/10/2008	Thursday	21:00:12	00:59:10	Documentaries: Human Interest	1426
MARGARET THATCHER - THE LONG WALK TO FINCHLEY	12/06/2008	Thursday	21:01:07	01:24:01	Documentaries: Human Interest	1019
HUGHIE GREEN, MOST SINCERELY	02/04/2008	Wednesday	21:00:20	01:18:41	Drama: Single Plays UK	895
RAILWAY WALKS	09/10/2008	Thursday	20:32:18	00:29:01	Documentaries: Human Interest	814
STEPTOE AND SON	19/03/2008	Wednesday	22:07:46	00:29:58	Entertainment: Situation Comedy UK	776
TIMESHIFT: THE LAST DAYS OF STEAM	16/10/2008	Thursday	20:59:57	00:59:00	Documentaries: Human Interest	747
HANCOCK AND JOAN	26/03/2008	Wednesday	21:00:34	01:26:50	Drama: Single Plays UK	709
STEAM DAYS	09/10/2008	Thursday	20:00:54	00:29:05	Hobbies/Leisure: Travel	699
THE PINK FLOYD STORY: WHICH ONE'S PINK?	23/05/2008	Friday	21:32:01	00:59:01	Music: Contemporary Documentary	693
THE BRITISH TRANSPORT FILMS - A NATION	23/10/2008	Thursday	21:01:28	00:38:51	Documentaries: History	690
THE THIRTIES IN COLOUR	16/07/2008	Wednesday	21:00:05	00:59:02	Miscellaneous	672
INSIDE THE MEDIEVAL MIND	17/04/2008	Thursday	21:01:54	00:58:25	Documentaries: History	669
FRANKIE HOWERD: RATHER YOU THAN ME	09/04/2008	Wednesday	21:02:08	00:57:19	Drama: Single Plays UK	669
STEPHEN FRY AND THE GUTENBERG PRESS	14/04/2008	Monday	21:00:58	00:59:01	Documentaries: History	664

Note: highest occurrence only, duration 5+ mins

Audience impact

The PSB Tracker asked regular viewers for their opinions on two statements relating to this PSB characteristic:

"It shows programmes I want to watch"

"Its programmes reflect the interests and concerns of people like me"

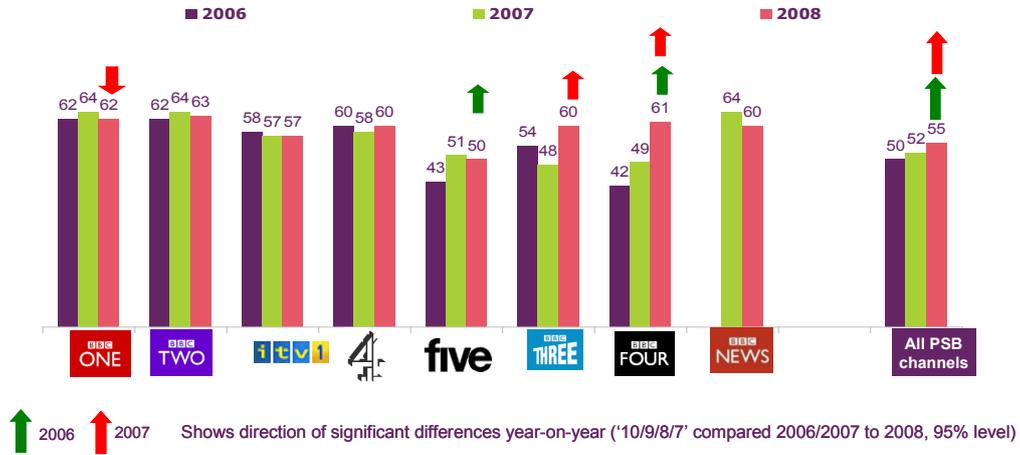
Engaging programmes – 'programmes I want to watch'

In 2008 around 6 in 10 regular viewers of most of the channels gave them a rating of 7-10 out of 10 in relation to *having programmes they wanted to watch*; BBC One (62%), BBC Two (63%), ITV1 (57%), Channel 4 (60%), BBC Three (60%), BBC Four (61%), BBC News (60%). Five was the exception as half of Five's regular viewers felt it *showed programmes they wanted to watch*. Since 2007, BBC Three and BBC Four have increased the proportion of their regular viewers who rate the channels as having particularly *engaging* programmes.

Figure 8.10: Engaging: audience opinions, programmes I want to watch

It shows programmes I want to watch

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317, BBC News = 796, 1507

Reflecting interests and concerns

Figure 8.11 looks at whether viewers felt that the channels *reflected their own interests and concerns*.

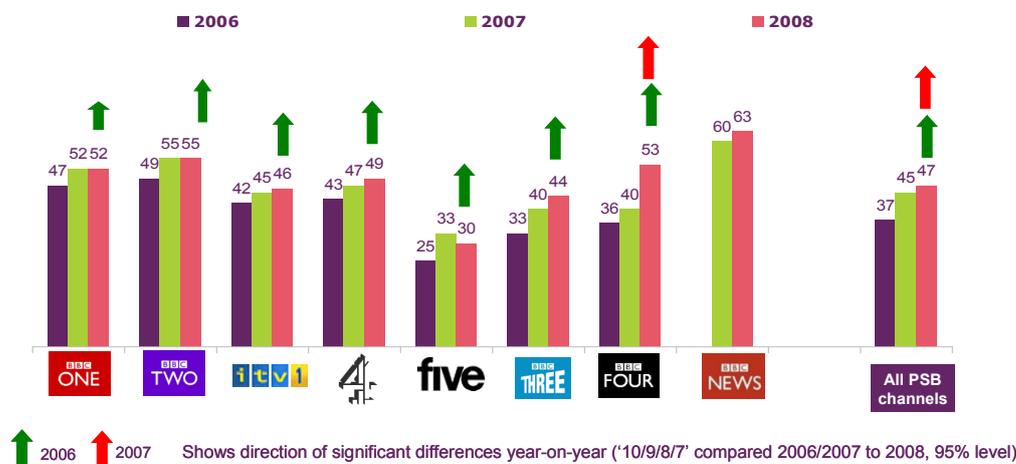
All channels except BBC News saw increases in their ratings on this characteristic when comparing 2008 with 2006, and BBC Four also saw increases on this measure from 2007.

Around half of BBC One's (52%) and BBC Two's (55%) regular viewers rated the channels highly in terms of *reflecting the interests and concerns of people like me*. ITV1 (46%) and Channel 4 (49%) received similar levels of positive opinion in this area. Five received the lowest ratings in this area, with 30% of its regular viewers feeling that the channel *reflected their concerns and interests*.

Figure 8.11: Engaging: audience opinions, reflects the interests and concerns of people like me

Its programmes reflect the interests and concerns of people like me

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317, BBC News = 796, 1507

Original: It shows enough new programmes made in the UK

Output hours

Figure 8.12 shows the number of hours of first-run originations broadcast by the five main PSB channels over the last five years. A key element of the PSB landscape, and one which distinguishes PSB broadcasters from purely commercial channels, is the high level of originated programming that these broadcasters show. Originated programmes are those commissioned from independent companies, as well as those made within the broadcasters own production divisions⁹⁹.

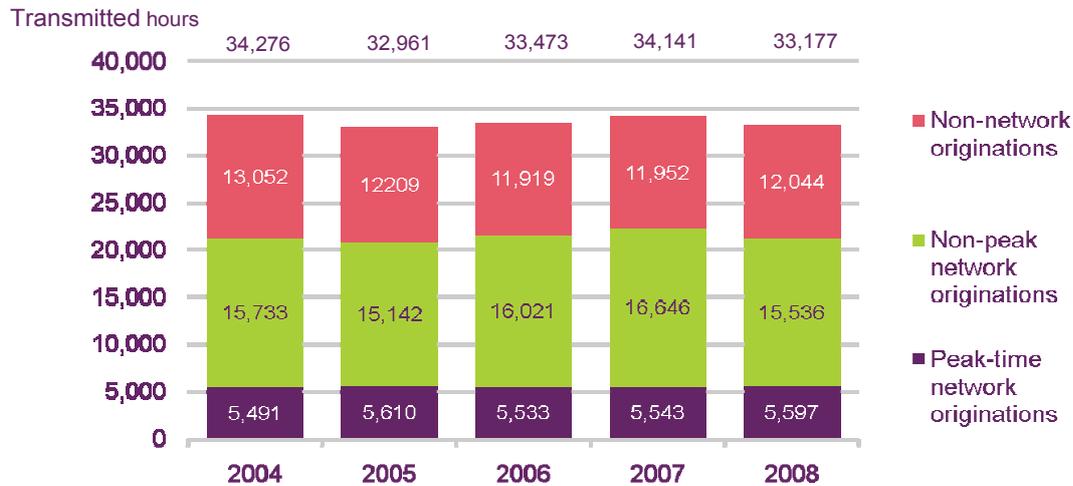
After reductions in 2005, output increased in 2006 and 2007 but fell back a little in 2008, to 33,177 hours a year or 638 hours a week.

In peak time, network originations have remained at similar levels, increasing a little in 2008 compared with 2007, to reach a total of 5,597 hours – equivalent to over 107 hours a week. Outside peak time the volume fell in 2008 compared with the previous two years, largely as a result of the cancellation of the late-night dial-in quiz programmes that had been shown in high volumes on ITV1 in those years.

Non-network originations are programmes produced and broadcast in the nations and English regions on BBC One, Two and ITV1/STV/UTV/ITV1 Wales, and consist largely of local News programmes. After reductions in 2005, this non-network output has remained relatively stable over the last three years when considering the BBC and ITV1/STV/UTV together.

⁹⁹ These programmes are generally more expensive to provide compared with bought-in acquired programmes, and require significant investment in creative skills. They are important for the economy of the creative industries, TV production companies and broadcast facilities across the UK. One of the ways that the levels of originated programmes are maintained is through output quotas on the PSBs.

Figure 8.12: Output of first-run originated programmes on the five main PSB channels, 2004-2008



Source: Broadcaster returns

Original output – new programmes made in the UK

Audience impact

Figure 8.13 shows the extent to which regular viewers of the PSB channels felt that the channels show 'enough new programmes, made in the UK'.

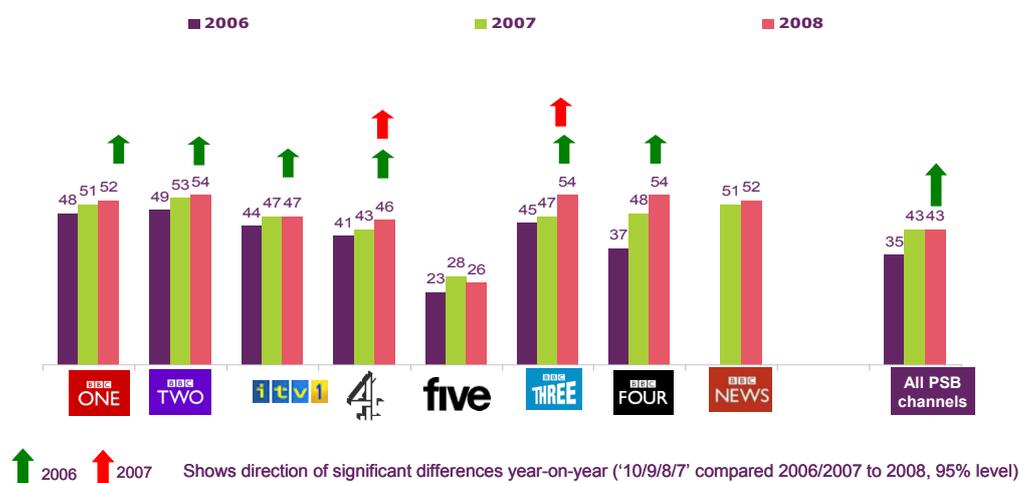
Just over half of all regular viewers of BBC One (52%), BBC Two (54%), BBC Three (54%), BBC Four (54%) and BBC News (52%) gave the channels a score of 7-10 out of 10 on this aspect of the PSB characteristics. Around a quarter (26%) of Five's regular viewers rated the channel positively on this measure, possibly because regular viewers were conscious of its levels of acquired overseas programming.

Since 2007, two channels have increased the proportion of their regular viewers rating them highly on having *enough new UK-originated programming*: Channel 4 and BBC Three. For most other channels: BBC One, BBC Two, ITV1 and BBC Four, increases in this measure were driven by increases from 2006 to 2007.

Figure 8.13: Original: audience views

It shows enough new programmes, made in the UK

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents who ever watch any PSB channels = 937, 7105, 6798

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 5220, 4938, 4850, BBC2 = 2420, 2378, 2334, ITV1 = 4027, 3724, 3587, Channel 4 = 2746, 2524, 2339, five = 1424, 1405, 1262, BBC3 = 481, 476, 541, BBC4 = 247, 287, 317, BBC News = 796, 1507

Pulse survey data

Respondents in the Pulse survey were asked a series of questions about their opinions of programmes they had watched. We have seen throughout other sections of the report that programmes made outside the UK contribute a greater degree of positive response to statements related to the PSB purposes and characteristics for Five, and to a lesser extent for Channel 4, than is the case for BBC One, BBC Two and ITV1. This largely reflects the different schedules of the channels and the relative viewership of such programmes, but is important to understand when considering the delivery of PSB purposes and characteristic throughout the channel output.

In this section, we specifically draw out the opinions of viewers of *programmes that are made within the UK*. The data for the channels with lower proportions of response to non-UK programming are very similar to the data for *all programming* reported throughout other sections (i.e. BBC One, BBC Two and ITV1). However, the data for the channels (Five and Channel 4) with a higher degree of viewer response to overseas programming is of particular interest here. This analysis looks at responses to all programmes, regardless of genre.

Figure 8.14 shows responses related to four elements of public service broadcasting for UK-made programming, alongside responses to all programmes on each of the PSB channels. The response to programmes in terms of the *quality* of Five's UK programmes was not quite as high as the response to the *total* range of programmes watched (84% vs. 87%).

Conversely, for Five and Channel 4, responses to the measures of *challenging* and *inspiring* were higher for UK-made programmes, than the responses on these measures about *all* programmes:

- Challenging:
 - Five: UK-made: 71% vs. overall 66%
 - Channel 4: UK-made: 64% vs. overall 60%

- Inspiring:
 - Five: UK-made: 57% vs. overall 50%
 - Channel 4: UK-made: 49% vs. overall 47%

Figure 8.14: Pulse survey opinions on UK-originated programming vs. all programming

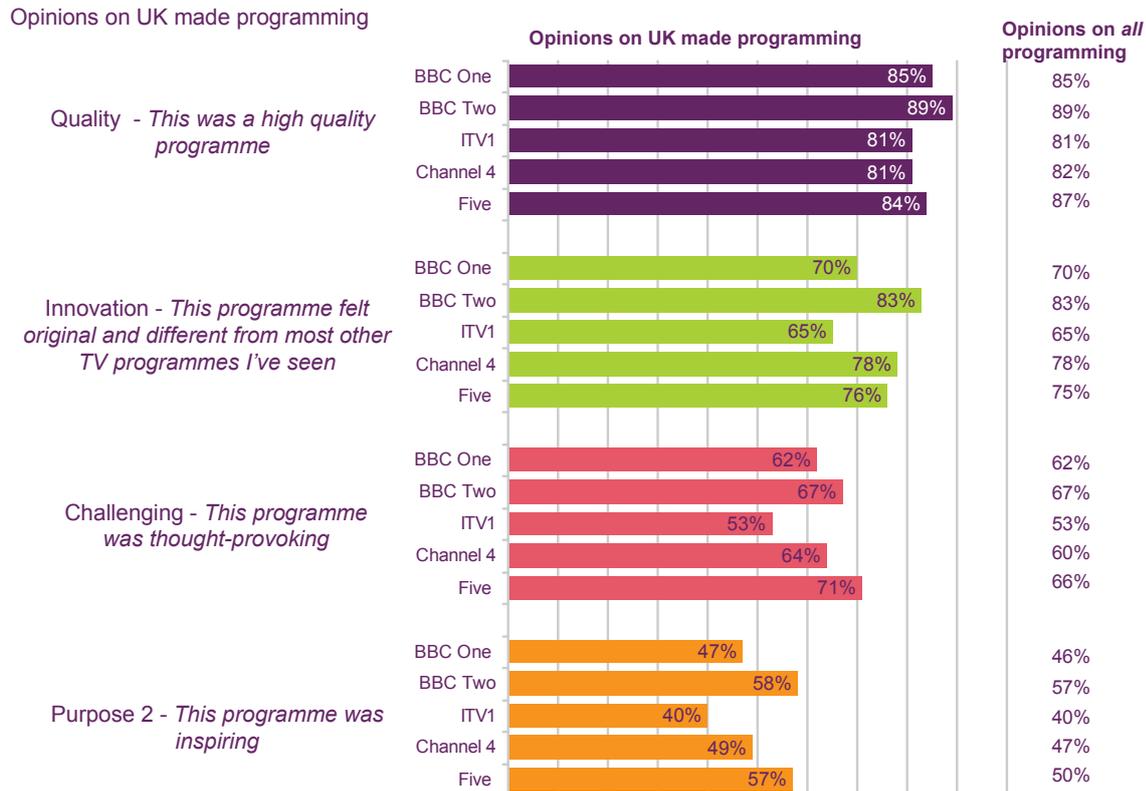


Chart shows overall agreement with statements for Base for all responses to programmes watched by Pulse respondents. Base sizes differ, smallest base = 42,143 programmes Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2008

Audience impact: demographic sub-group analysis

We analysed the profile of regular viewers who rated the individual channels highly on this element of PSB. This analysis allows us to make comparisons between channels, to identify which channels gained a higher proportion of those rating the channel highly falling in different demographic groups. Note: the actual proportion of the general population who rated the channels highly differs by channel and is not taken into account in this analysis.

This analysis showed a similar picture across all of the characteristics (and across many of the elements of the PSB purposes as well), with the key findings outlined below:

- Those who positively rated ITV1 and Five tended to be more likely to be female than those who rated the other channels highly.
- Those who rated BBC Two, BBC News, and to a lesser extent BBC Four, highly were more likely to be male than those who rated other channels highly.
- Those who rated Channel 4, and BBC Three highly were more likely to be aged 16 – 34 than those rating other channels highly.

- Those who rated BBC One, BBC Two, Channel 4, BBC Four and BBC News highly tended to be more likely to be in the AB socio demographic groups than those rating other channels highly.
- Among those rating the channels highly, Five, BBC News, and to lesser extent Channel Four, tended to be more likely to have a higher proportion of people from ethnic minority groups than some other channels e.g. BBC Two and ITV1.

Section 9

Children's PSB

Introduction

This section looks in detail at Children's PSB. This includes details about Children's genre output, viewing of Children's programming and viewing by children more generally, as well as parents' perceptions of Children's programming and PSB.

The *Second Review of PSB* found Children's programming to be an audience priority for UK-originated provision and a genre at risk without further funding in the future. It is also an area with considerable competition from commercial digital channels.

The focus of this section is the main five PSB channels and CBeebies and CBBC¹⁰⁰.

Summary findings

Spend

- Overall expenditure on Children's network programming by the five main PSB channels has fallen over the last 5 years, amounting to a cut of almost half (48%) from £119m in 2004 to £61m in 2008¹⁰¹.
- *First-run originated* spend by the wider group of PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five, CBeebies and CBBC) has fallen from £139m in 2004 to £87m in 2008. Within this, BBC spend has decreased from £97m in 2004 to £77m in 2008, while the commercial channels combined spend (ITV1, Channel 4 and Five) has fallen from £42m in 2004 to £11m in 2008.

Output

- Total hours of children's programming broadcast across the five main PSB channels fell by 858 hours (17%) in 2008, compared with 2004. Taking the BBC's digital channels, CBeebies and CBBC into account, the total number of hours reduced from 13,005 hours in 2004 to 12,471 hours in 2008, a fall of 534 hours or 4%.
- In 2008, the volume of *UK first-run originated* Children's programming on the five main PSB channels and CBeebies/CBBC combined (919 hours) was half that broadcast in 2004 (1,887 hours). The reductions have happened on all PSB channels to a greater or lesser extent. The decreases since 2004 amounted to a 34% reduction on BBC One and a 68% reduction on ITV1.
- A higher volume of hours of pre-school programmes was broadcast on PSB channels in 2008 than any other types of Children's output. In total, 44% of all Children's programmes were in the pre-school sub-genre, the majority of which were broadcast

¹⁰⁰ CiTV is only included as context, as this is not a PSB channel.

¹⁰¹ Figures are expressed in 2008 prices.

on CBeebies, (understandably, as this is a channel targeting younger children) with BBC Two, Channel 4 and Five also showing sizeable amounts.

- Children's Drama and Factual programmes featured less frequently in the commercial PSB schedules, although they were still a part of the PSB's output, particularly on BBC One and CBBC.

Viewing

- There was also a reduction in the proportion of viewing of the **Children's genre** on the five main PSB channels (32% in 2004 to 12% in 2008).
- Despite increased viewing on the BBC digital children's channels (from 15% in 2004 to 24% in 2008), there was an overall decrease in the proportion of viewing of the genre on the PSB channels and BBC digital channels combined in the last year (47% in 2004 to 36% in 2008).
- An increase in the proportion of children's viewing of any TV programme on non-PSB channels meant that in 2008, less than half (48%) of total television viewing was of the PSB channels.

Audience impact

- The dedicated children's channels, CBBC and CBeebies, received high ratings on *offering a wide range of high-quality and UK-made programmes for children* from the parents of children regularly watching them; 71% rated CBBC highly on this measure and 82% rated CBeebies highly.
- Around half (49%) of parents/carers of children watching BBC One rated the channel highly on *offering a wide range of high-quality and UK-made programmes for children*. BBC Two and ITV1 were rated similarly to each other, with 39% and 35% rating them highly on this measure. Less than a third of the parents who were asked about the channels rated Five (31%) and Channel 4 (20%) highly on this aspect of PSB delivery.
- Fewer parents of children watching CiTV, the Disney Channels or the Nickelodeon channels see the commercial Children's channels as *offering a wide range of high-quality and UK-made programmes for children* compared to the PSB dedicated Children's channels, CBBC and CBeebies.

Background

Children's programming is broadcast on the five main PSB channels while dedicated children's channels are also available from the PSB broadcasters and commercial broadcasters via digital TV.

This chapter looks at Children's PSB programming in terms of output hours, viewing figures and parents' opinions, for BBC One, BBC Two, ITV1, Channel 4, Five, CBeebies and CBBC.

Spend

Figure 2.5 in section 2 identified that expenditure on Children's programmes by the five main PSB channels has fallen over the last 5 years, amounting to a cut of almost half (48%) from £119m in 2004 to £61m in 2008¹⁰².

Figure 9.1 shows the decrease in *first run originated spend* by the wider group of PSB channels (BBC One, BBC Two, ITV1, Channel 4, Five, CBeebies and CBBC, but excluding S4C) from £139m in 2004 to £87m in 2008. Within this, BBC spend has decreased from £97m in 2004 to £77m in 2008, while the commercial channels combined spend (ITV1, Channel 4 and Five) has fallen from £42m in 2004 to £11m in 2008.

Figure 9.1: First run originated children's spend on the PSB¹⁰³ channels



Source: Ofcom/Broadcaster returns. Note: figures are expressed in 2008 prices. Figures include GMTV.

Output hours¹⁰⁴

Hours of children's programming broadcast across the five main PSB channels fell by 175 hours (4%) in 2008, compared with 2007. Taking the BBC's digital channels, CBeebies and CBBC, into account, the total number of hours reduced in 2008 to 12,471 hours, a fall of 156 hours.

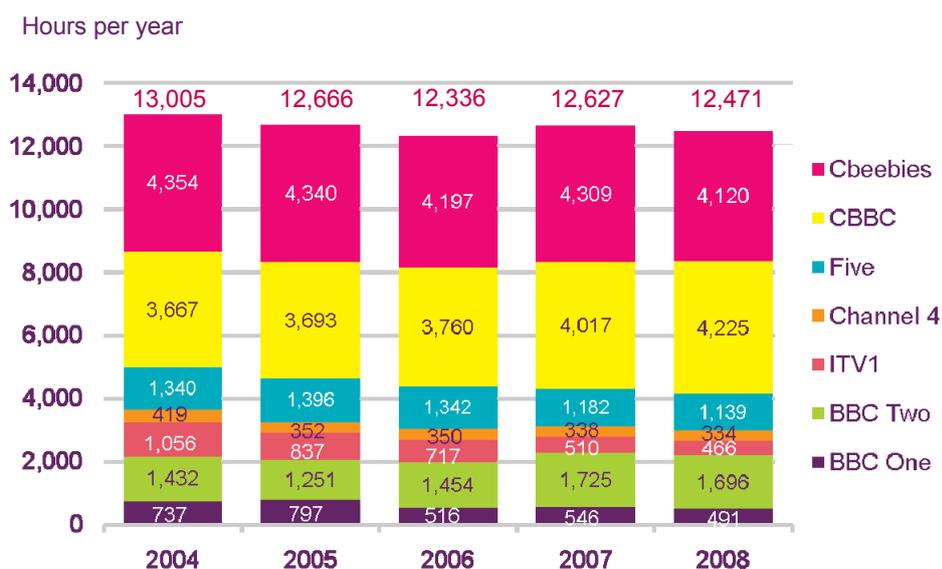
These figures compare all types of programmes, including first-run, repeats, own productions, commissions from independent producers and acquired programmes. On all channels except CBBC, the level of Children's output was lower in 2008 than in the previous year. Going back further in time, the reduction is more pronounced - since 2004 the number of hours of Children's programmes broadcast on BBC One has decreased by a third and on ITV1 by more than half. The figures for ITV1 include GMTV1.

¹⁰² Figures are expressed in 2008 prices.

¹⁰³ BBC spend includes BBC One, BBC Two, CBBC and CBeebies.

¹⁰⁴ NB The genre of Children's programming is not the only genre shown on the BBC's digital children's channels, e.g. programmes classified at Education as also shown.

Figure 9.2: Children’s PSB output, 2004 - 2008



Source: Broadcaster returns

UK-originated hours are programmes commissioned from the broadcasters’ in-house production teams, together with commissions from independent producers. Figure 9.2 shows how the total number of first-run originated Children’s hours shown by PSB channels has more than halved over the last four years, dropping from 1,887 hours in 2004 to 919 in 2008. The reductions have happened on all PSB channels to a greater or lesser extent.

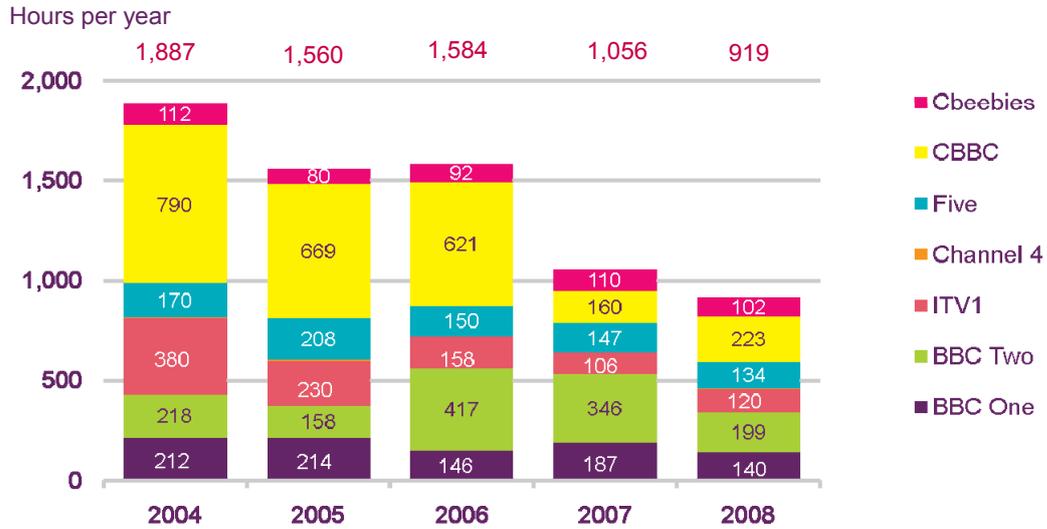
The decreases since 2004 amounted to a 34% reduction on BBC One and a 68% reduction on ITV1 (in line with ITV’s change in scheduling policy, which moved children’s programmes from weekday afternoons to the weekend, and the launch of its digital children’s channel, CiTV). Many of ITV’s new commissions for children tend to be made for the digital channel (and may be subsequently repeated on ITV1). Data for CiTV are not included in this report as it is not a PSB channel.

A reduction of 72% was recorded by CBBC, partly due to a reduction in the number of long-running, high volume but low budget programmes, such as *Level Up*. The BBC’s commissioning strategy aims to produce fewer but better programmes. There were also changes in 2007 which reduced the number of programmes broadcast simultaneously across channels and which were therefore no longer counted as first-run originations on both channels.

Between 2007 and 2008 UK first-run originated hours of children’s programmes on the five main PSB channels and Cbeebies/CBBC decreased by 13% from 1,056 in 2007 to 919 in 2008. Reductions were seen for BBC One (47 hours or 25%), BBC Two (147 hours or 42%), Five (13 hours or 9%) and Cbeebies (8 hours or 7%) in the past year.

Note: the data shown for ITV1 within Figure 9.3 includes GMTV1. First-run originated hours on GMTV1 increased from 26 hours in 2007 to 64 hours in 2008, while the hours on ITV1 *excluding GMTV1* decreased from 80 hours in 2007 to 56 hours in 2008.

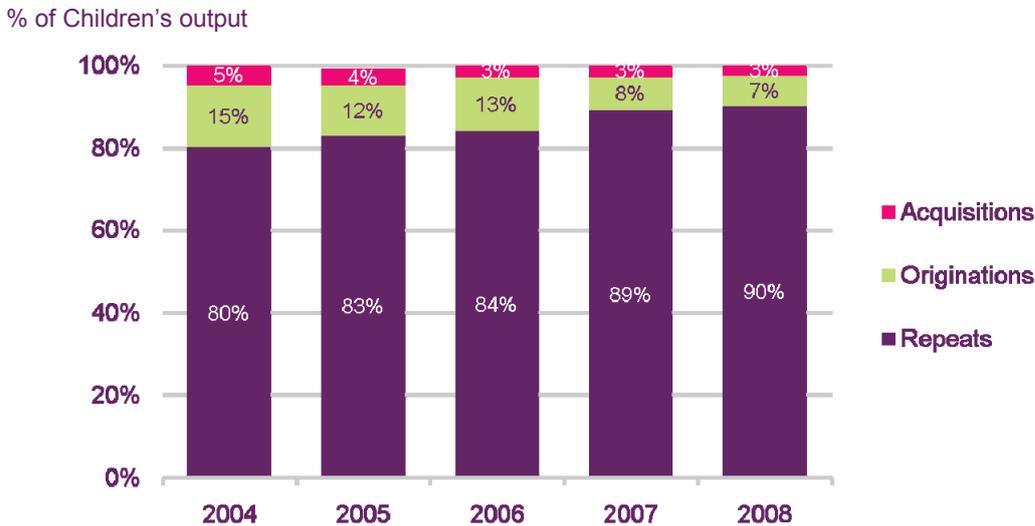
Figure 9.3: Hours of first-run originated Children’s PSB output on individual channels, 2004 – 2008



Source: Broadcaster returns

Figure 9.4 shows that the majority of Children’s broadcasts were repeats – 90% in 2008 - a figure which has risen from 80% in 2004. As noted in the previous figure, first-run originated programmes have reduced over the period and accounted for 7% of total Children’s output in 2008, compared with 15% in 2004. First-run acquisitions (programmes bought in from other sources, including US cartoons and animations) made up the remaining 3% of output. Acquired repeats are included within the 90% repeats figure.

Figure 9.4: Overview of the hours of originated Children’s PSB output, 2004 – 2008



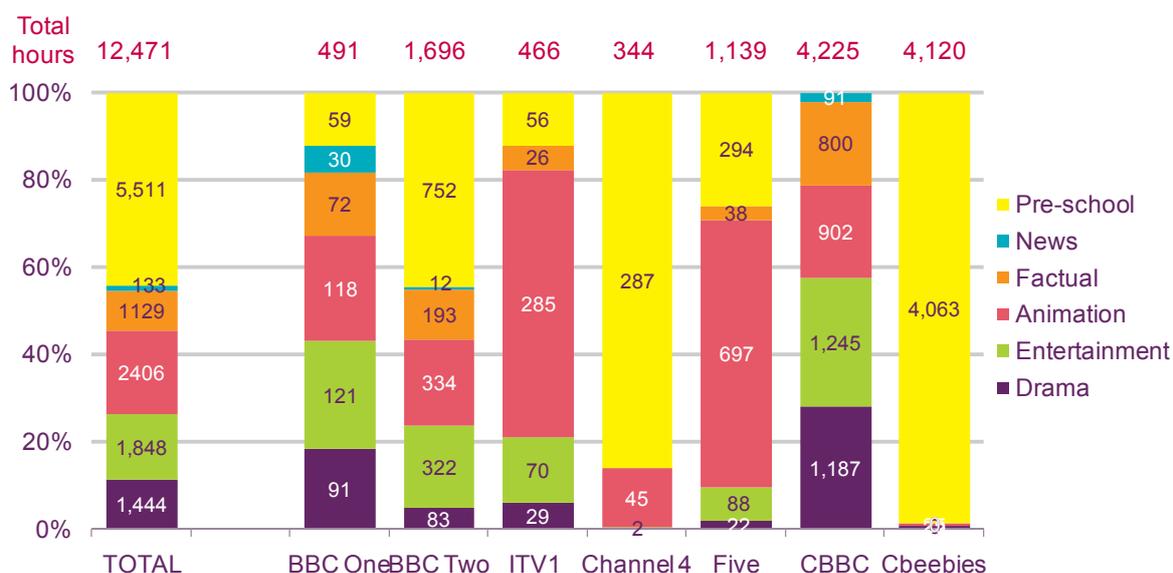
Source: Broadcaster returns

Figure 9.5 shows the profile of Children’s output by sub-genre on the PSB channels. This shows that a higher volume of hours of pre-school programmes than other types of Children’s output were broadcast on PSB channels. In 2008, 5,511 hours of pre-school output, representing 44% of total Children’s programmes were shown. The majority (74%) were broadcast on Cbeebies (a channel targeting this age group), with BBC Two, Channel 4 and Five also showing sizeable amounts.

Animated children’s programmes (mainly cartoons) accounted for 19% of total Children’s output and featured in all PSB schedules, but particularly on Five, BBC Two and ITV1. A total of 697 hours of animation, equivalent to 61% of Five’s Children’s output, was broadcast, compared with 334 hours on BBC Two (20% of BBC Two’s output) and 285 hours (61% of ITV’s output) on ITV1, mostly during GMTV’s breakfast time service.

Entertainment represented 15% of the Children’s total for all channels taken together, with most of the Entertainment hours being shown on CBBC. Children’s Drama and Factual programmes, which are typically produced or commissioned by the broadcasters rather than being bought in, ready made, from other sources, are more expensive to produce and feature less frequently in the commercial PSB schedules. They are still a regular part of the PSB channels’ output, particularly BBC One and CBBC.

Figure 9.5: Children’s PSB output by sub-genre, 2008



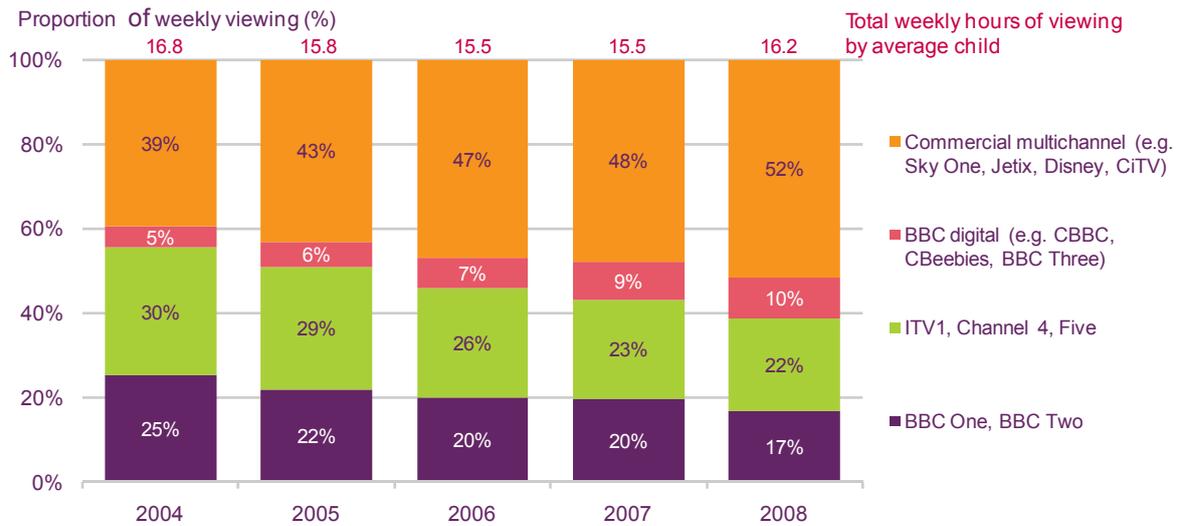
Source: Broadcaster returns

Viewing figures

Figure 9.6 shows children’s viewing of all television, not just Children’s programming. There was a slight decrease in viewing from 16.8 hours per week in 2004 to 16.2 hours per week in 2008, although this was at its lowest in 2006 and 2007 at 15.5 hours per week.

This figure also shows that the proportion of children’s viewing on the five main PSB channels has declined year on year; from over 55% in 2004 to 39% in 2008. Now the majority of children’s viewing is on commercial digital channels, 52% in 2008 from 39% in 2004. In this time BBC portfolio channels have seen an increase in the proportion of viewing each year: from 5% in 2004 to 10% in 2008.

Figure 9.6: Children’s total weekly viewing by channel type, 2004 - 2008

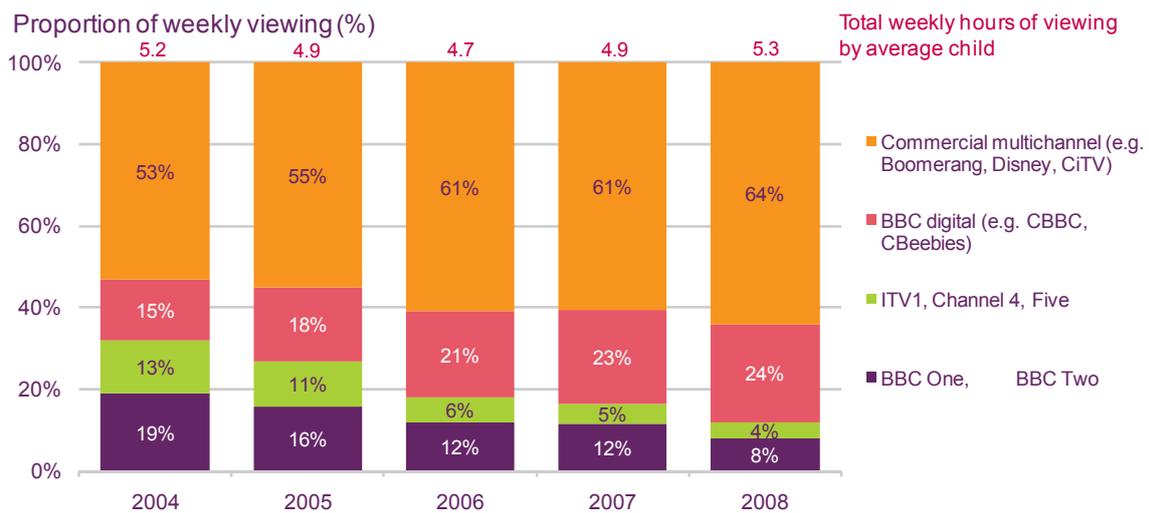


Source: BARB 2004-2008, all children 4-15

Figure 9.7 shows that the average hours of viewing of Children’s programming has decreased from 5.2 hours per week in 2004 to 4.7 hours per week in 2006. However, in 2007 it increased to 4.9 hours per week and in 2008 increased again to 5.3 hours per week.

The proportion of viewing of Children’s programming on commercial digital channels has grown from 53% in 2004 to 64% in 2008. Similarly, viewing of children’s programming on BBC digital channels has grown from 15% in 2004 to 24% in 2008. The proportion of viewing in both BBC One’s and BBC Two’s children’s airtime and in ITV1, Channel 4 and Five’s combined airtime has tended to decline year on year.

Figure 9.7: Children’s weekly viewing of Children’s genre, by channel type, 2004 - 2008¹⁰⁵



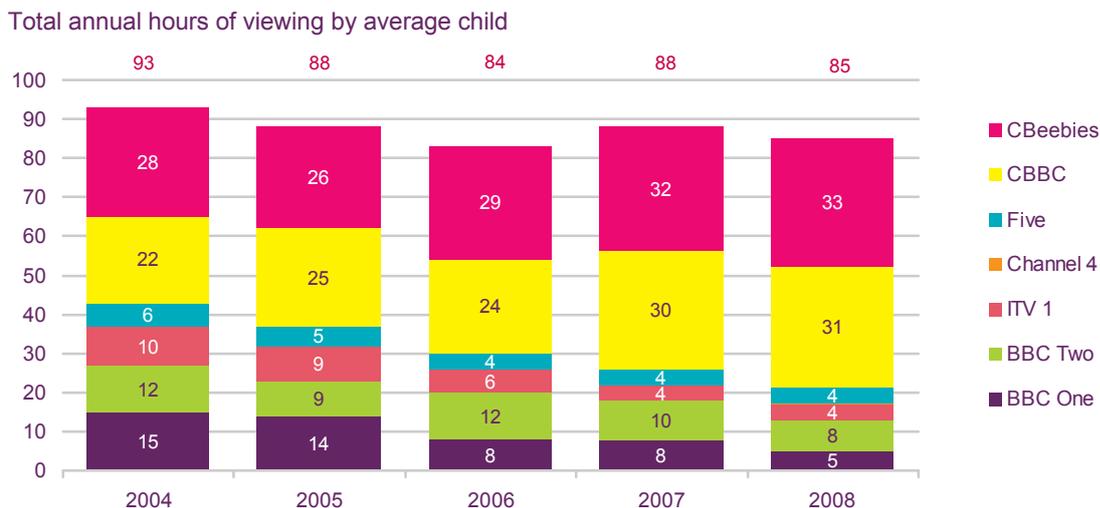
Source: BARB 2004-2008, all children 4-15

Hours of viewing of the Children’s genre, among children in multichannel homes has declined overall, from 93 total annual hours in 2004 to 85 hours in 2008. The total hours

¹⁰⁵ BARB data for 2007 has been re-stated here as the previous data published was inaccurate.

spent watching Children’s programming on the five main PSB channels has declined dramatically from 43 hours in 2004 to 21 hours in 2008. The largest decrease in hours was seen on BBC One, with a decrease of ten hours from 2004 to 2008, followed by ITV1 with a decrease of six hours over the same period. Conversely, viewing of CBBC and CBeebies increased from 50 hours in 2004 to 63 hours in 2008; in terms of PSB Children’s genre provision CBBC and CBeebies made up 74% of viewing in 2008.

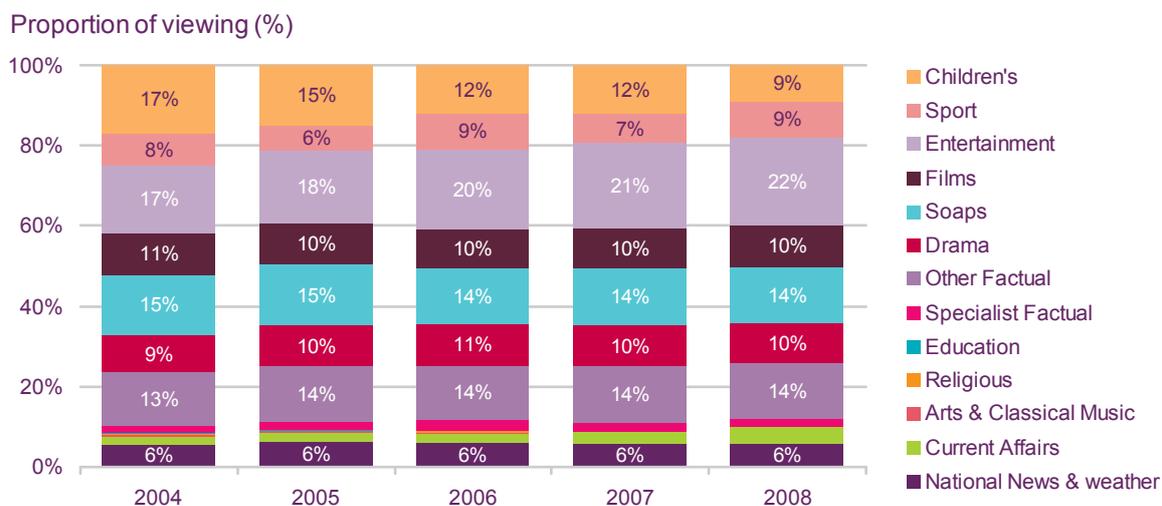
Figure 9.8: Children’s viewing hours of Children’s genre on PSB channels in multichannel households, 2004 - 2008



Source: BARB 2004-2008, all children 4-15 in multichannel homes, Children’s genre only

Figure 9.9 shows the proportion of children’s viewing by genre across the entire day on the five main PSB channels over time. This shows that there has been a consistent decline in the proportion of viewing attributed to the Children’s genre, from 17% in 2004 to 9% in 2008. This reflects the fact that children are transferring more and more of their viewing to this genre on digital channels. The other genre to show a change is Entertainment programming, where viewing has grown year on year from 17% of children’s viewing on the five main channels in 2004 to 22% in 2008.

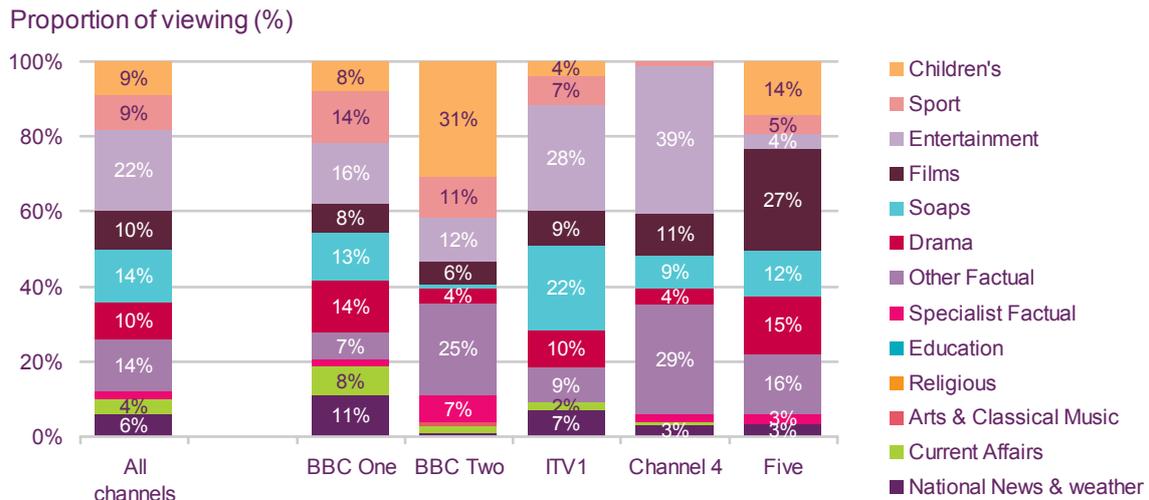
Figure 9.9: Children’s viewing, by genre, across the five main PSB channels, 2004-2008



Source: BARB 2004-2008, Network, five main PSB channels only, all children 4-15, 24 hours

Figure 9.10 breaks down children’s viewing on the five main PSB channels by genre. This shows that for children the genre with the largest proportion of viewing on BBC One was Entertainment, followed by Drama, Sport and Soaps. For BBC Two, 31% of viewing on the channel was of Children’s genre programming, higher than for any other channel, but this reflects the fact that BBC Two carries the largest amount of Children’s output of all the main terrestrial channels, followed by Other Factual. On ITV1, the genres with the highest proportion of viewing for children were Entertainment, followed by Soaps. For Channel 4, the highest proportion of viewing was of Entertainment, followed by Other Factual, and on Five it was Films, followed by Other Factual and Drama.

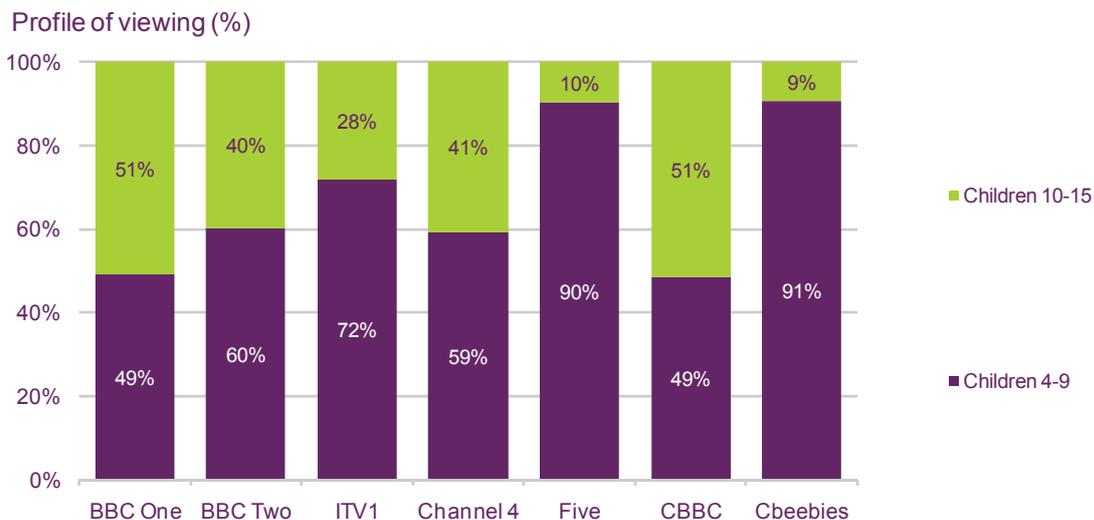
Figure 9.10: Children’s viewing by genre across the five main PSB channels, 2008



Source: BARB 2008, Network, five main PSB channels only, all children 4-15, 24 hours

Figure 9.11 shows the profile of children watching the Children’s genre programming on different channels. BBC One and CBBC had an almost 50:50 split in their child viewer profile between children aged 4-9 and those aged 10-15. CBeebies and Five had a significantly higher proportion of 4-9 year olds watching. BBC Two and Channel 4 have similar child viewer profiles, as does ITV1.

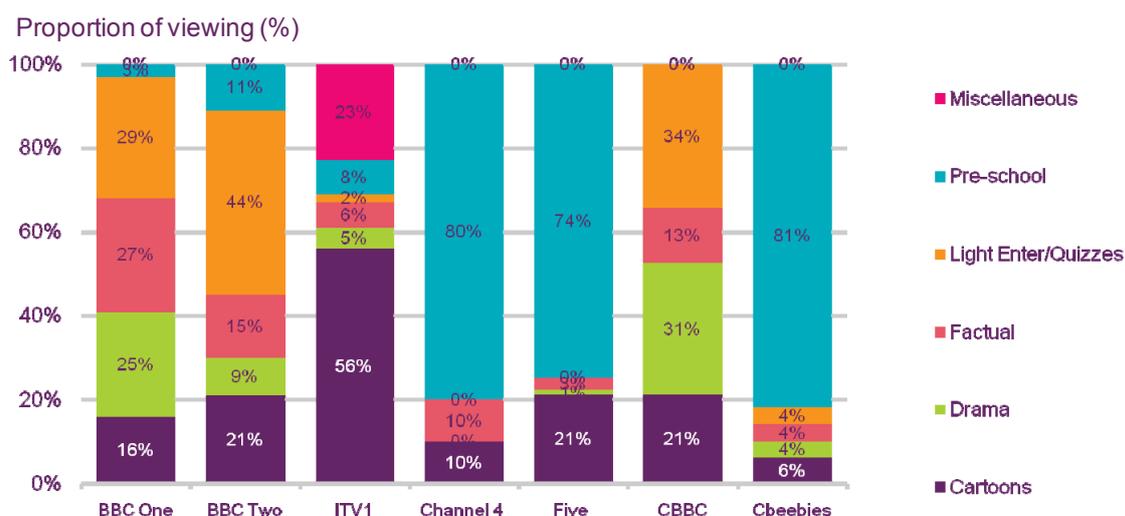
Figure 9.11: Profile of viewing of children’s genre on main PSB channels PSB children’s channels



Source: BARB 2008, Profile based on all children 4-15

Figure 9.12 identifies the proportion of children’s viewing of Children’s genre programming by sub-genre across individual channels. Light Entertainment/Quizzes made up 29% of viewing of Children’s programming on BBC One, followed by an almost even split between Drama and Factual. CBBC followed a similar pattern but with a slightly smaller proportion of viewing of Factual and a slightly higher proportion of Drama. More viewing on CBBC was of Cartoons than on BBC One, at 21% and 16% respectively. Over two-fifths (44%) of viewing of Children’s programming on BBC Two was also of Light Entertainment/Quizzes, followed by Cartoons. For ITV1 over half (56%) of total viewing of the Children’s genre was Cartoons. Viewing of Channel 4, Five and CBeebies was dominated by the Pre-school genre. Viewing of Channel 4, Five and CBeebies was dominated by the Pre-school genre.

Figure 9.12: Proportion of viewing of the Children’s genre by sub-genre, all children



Source: BARB 2008, all children 4-15, 24 hours

Audience impact

PSB Tracker research

In the PSB Tracker, parents are asked about their opinions of Children’s programming. Before July 2008 parents or guardians of children aged under 16 were asked to rate the main PSB channels *excluding CBBC and CBeebies* on having a *range of high quality and UK-made programmes for children*. Parents were asked about channels that they themselves regularly viewed, to get an informed opinion. In order to improve this measurement, from July 2008 parents or guardians were asked to give opinions on *CBBC and CBeebies in addition to the five main PSB channels*, and parents were asked their opinions of the channels that their child regularly watched. While the former data are included in the overview sections of this report, in order to give a view over time, within this section we focus only on the more recent data.

Contribution of individual PSB channels to the delivery of PSB in children’s programming

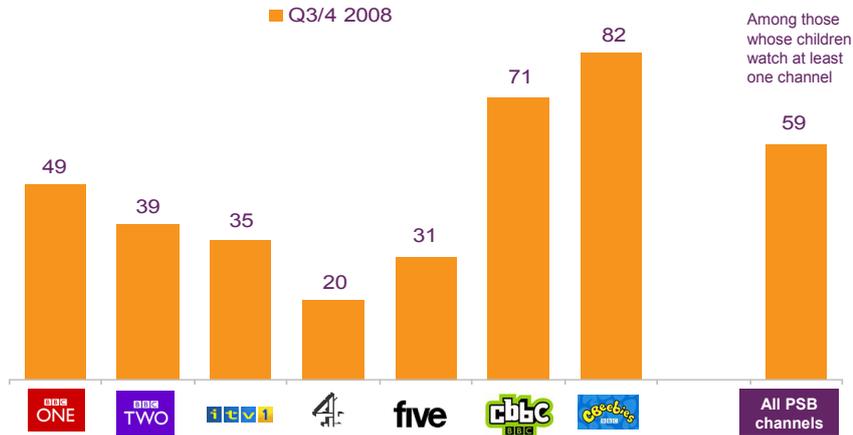
Figure 9.13 shows to what extent parents of children watching the channels saw each as offering a *wide range of high quality UK-made programmes for children*.

The dedicated Children’s channels, CBBC and CBeebies, received high ratings from the parents of children regularly watching them; 71% rated CBBC highly on this measure and 82% rated CBeebies highly. Looking at the five main channels, we see that around half (49%) of parents of children regularly watching the channels rated BBC One highly on this

measure. BBC Two and ITV1 were rated similarly to each other, with 39% and 35% rating them highly on this measure. Less than a third of the parents asked about the channels rated Five (31%) and Channel 4 (20%) highly on this aspect of PSB delivery.

Figure 9.13: Parents' opinions on PSB channels' Children's programming, 2008

It provides a wide range of high-quality and UK-made programmes for children
 Extent to which the purpose/characteristics applies to the channel(s), where 10 means is the highest score and one is the lowest.
 Amongst parents whose children are regular viewers of each channel



Base for 'all PSB channels': All respondents whose children regularly watch at least one channel (Q4 only)= 357
 Base for individual channels: Those whose children are regular viewers of each channel: (July, October 08). CBBC = 403, CBeebies = 416, BBC1 = 446, BBC2 = 246, ITV1 = 386, Channel 4 = 309, Five = 235
 Source: Ofcom PSB Tracker, Gfk NOP

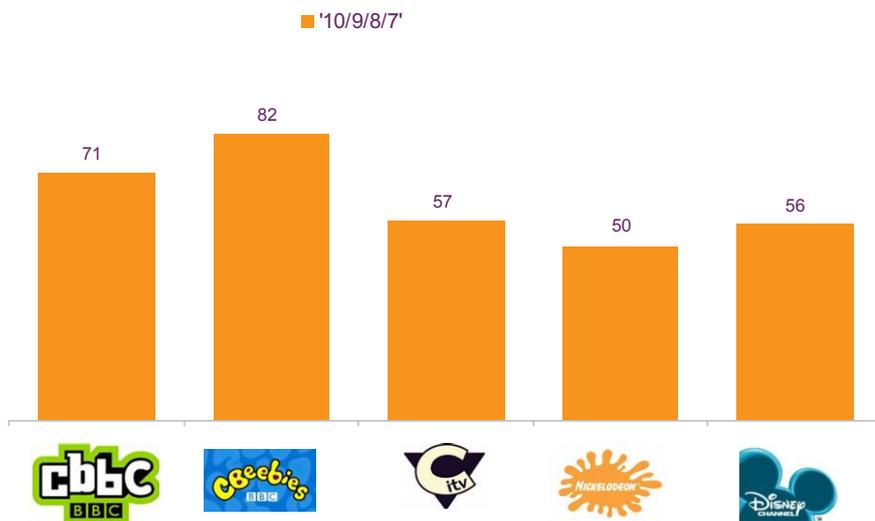
In order to provide context for the findings for CBBC and CBeebies, parents were also asked about their views on CiTV, the Disney channels generally and the Nickelodeon channels as a whole. Note that the non-PSB channels' output is not necessarily UK focused.

Figure 9.14 shows the ratings for these channels among parents of children who regularly watch them. This shows that fewer of the parents see the commercial Children's channels as offering a wide range of high-quality and UK-made programmes for children compared to CBBC (71%) and CBeebies (82%). Around 6 in 10 (57%) rated CiTV highly on this measure, 56% rated the Disney channels highly and half (50%) rated the Nickelodeon channels highly.

Figure 9.14: Parents' opinions on digital channels' Children's programming, 2008

It provides a wide range of high-quality and UK-made programmes for children

Extent to which the purpose/characteristics applies to the channel(s), where 10 means is the highest score and one is the lowest. Amongst parents whose children are regular viewers of each channel



Base for 'all PSB channels': All respondents whose children regularly watch at least one channel = 357

Base for individual channels: Those whose children are regular viewers of each channel: (July, October 08). CBBC = 403, CBeebies = 416, CiTV = 282, Nickelodeon channels = 316, Disney channels = 325

Source: Ofcom PSB Tracker, GfK NOP

Section 10

Nations: Scotland

Introduction

This section looks in more in detail at PSB output, viewing and viewer opinion within Scotland. An overview of PSB is given, but specific attention is paid to areas most pertinent to the devolved nations; that is, provision of nations/regions News and non-News and elements of purpose 1 – *informing our understanding of the world* and purpose 3 – *reflecting cultural identity*.

Summary findings

Output

- The overall volume of nations/regions programmes on BBC Scotland fell from 959 hours in 2004 to 869 hours in 2008. Due to a re-allocation of programmes between News and Current Affairs in 2008, there was an increase of 136 hours of Current Affairs programming and a reduction in News in 2008 from 2007. There was a decrease in 'Other' output, partly due to fewer hours of sport being shown, in particular football.
- On Channel 3, changes in the quota since 2004 have resulted in fewer hours of non-network or nations/regions programmes being broadcast in the STV Central and North regions. However, there was an increase in non-network output in 2008 in comparison to 2007, due to the introduction of a new News and Entertainment magazine programme.

Viewing

- Of all of the devolved nations, individuals in Scotland consumed the highest volume of nations/regions News on average in 2008 (96 hours).
- Audience share for BBC One and STV nations/regions News programmes were more similar in Scotland than in other devolved nations; in 2008 BBC One achieved a share of 27% (down from 30% in 2004) while STV achieved a share of 26% (up from 24%).

Audience impact

- Overall, the research statements reflecting purpose 1- *informing our understanding of the world* and the broad cultural elements of purpose 3 are perceived as particularly important by viewers in both Scotland and the UK generally.
- One aspect of the purposes that viewers in Scotland tend to give more importance to compared the UK more generally relates to purpose 3 – *Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation* (Scotland 68% vs. UK 62%)
- Viewers in Scotland were less likely than UK viewers overall to rate the PSB channels highly on two element of the PSB purposes; purpose 1 - *Its news programmes for people in Scotland provide a wide range of good quality news about*

my nation (Scotland 48% vs. UK 55%) and purpose 2 - *It shows interesting programmes about history, sciences or the arts* (Scotland 46% vs. UK 51%)

- In 2006, ITV1¹⁰⁶ was rated more positively on *having a wide range of good quality News about Scotland* by its regular viewers, than BBC One was by its regular viewers; but in 2008 this was no longer the case. Self-claimed regular viewers of ITV1 in 2008 did not rate the channel as highly as in previous years on *having a wide range of good quality News about Scotland* (55% in 2008 in comparison to 66% in 2007), despite increased share of viewing.
- There were no significant changes in the ratings given by regular viewers of each of BBC One, BBC Two and ITV1 in Scotland on the delivery of nations non-News programming in 2008 compared to in 2007. Just over a third of regular viewers of BBC Two (34%) and ITV1 (36%) in Scotland, and 40% of BBC One's regular viewers said that *aside from news, the channels provide a range of good quality programmes about Scotland, made for people in my nation*.

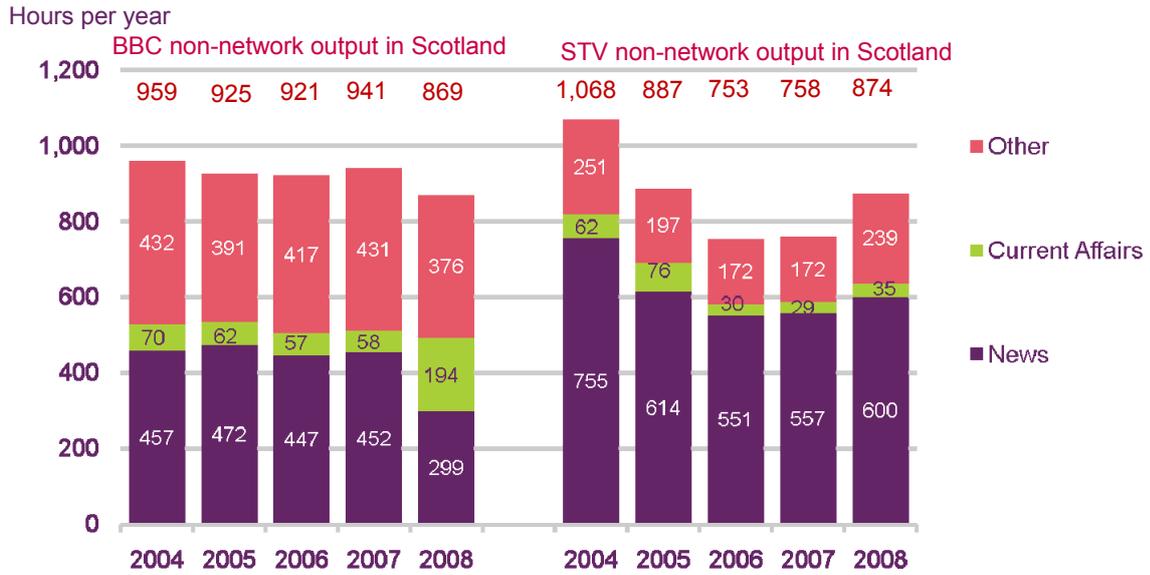
Output

Total output of nations/regions programming (or 'non-network output') is shown in Figure 10.1. Nations/regions programmes on BBC Scotland fell from 941 hours in 2007 to 869 hours in 2008. There was a re-allocation of programmes between News and Current Affairs resulting in an increase of some 136 hours of Current Affairs programming and a reduction in News. The fall in 'Other' output was partly due to fewer hours of Sport being shown, in particular football.

On Channel 3, changes in the quota since 2004 have resulted in fewer hours of non-network programmes being broadcast in the STV Central and North regions. However, in 2008 the introduction of a new News and Entertainment magazine programme at 5.30pm on weekdays was the primary reason for an increase in non-network output in 2008, bringing the volume of output back to 2005 levels.

¹⁰⁶ Within the PSB Tracker, Channel 3 is more simply referred to as ITV1 for all respondents in all nations. Note: within Scotland Channel 3 is STV.

Figure 10.1: Non-network output in Scotland, 2004-2008



Source: Broadcaster returns
 Note: Figures exclude repeats

Viewing

Figure 10.2 sets out the relative proportions of viewing of the different genres on the five main PSB channels across the devolved nations.

There appears to be quite a lot of consistency in patterns of viewing, especially between the overall picture of viewing in Scotland and Northern Ireland in 2008, although individuals in Scotland spent less of their viewing time watching Other Factual programming.

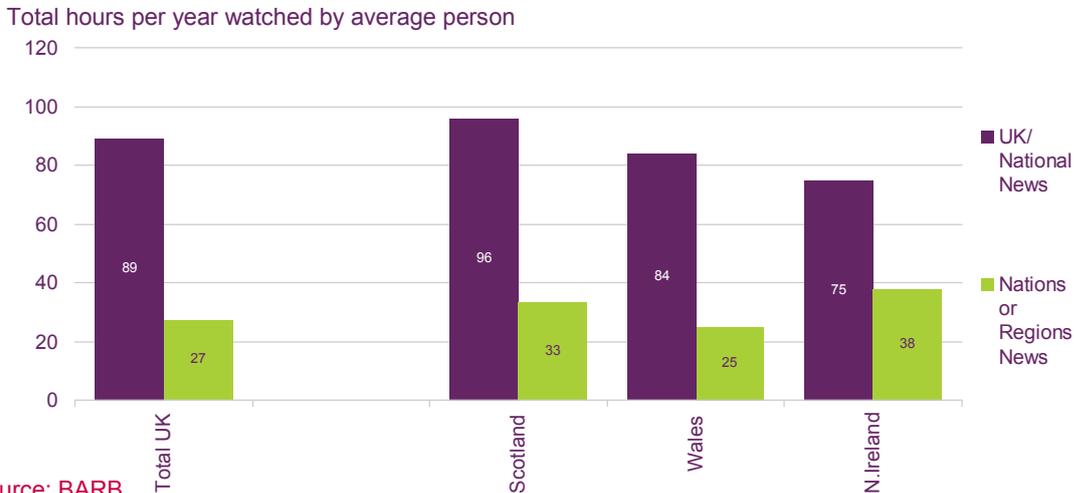
Figure 10.2: Proportion of viewing on five main PSB channels, by devolved nation, 2008



Source: BARB, 2008

Figure 10.3 looks at the average hours per year per individual spent viewing UK/national News compared to nations/regions News in each nation in 2008. Individuals in Scotland consumed the highest volume of nations/regions News over a year (96 hours).

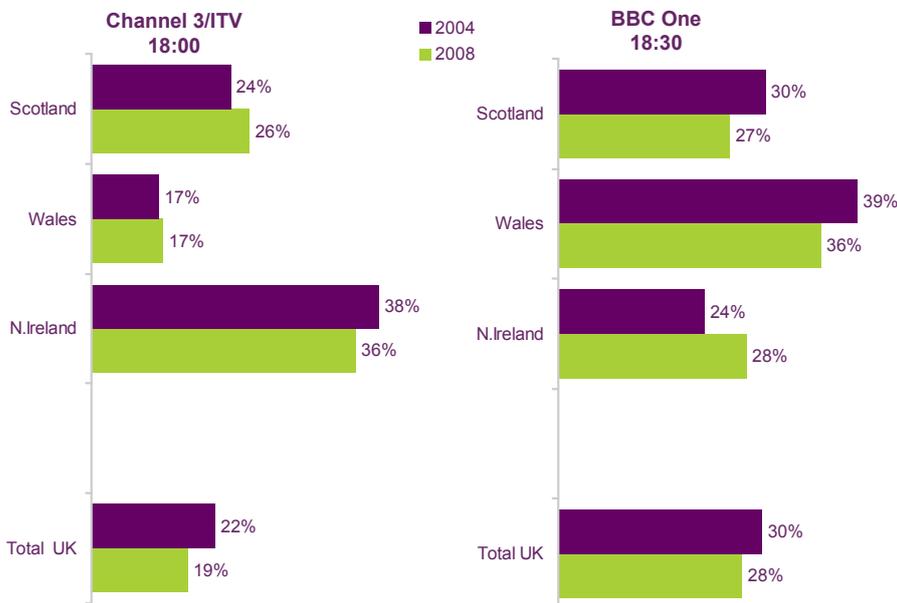
Figure 10.3: Total hours of viewing of nations/regions news versus UK/national News, by nation, 2008



Source: BARB

Figure 10.4 shows the share of all viewing gained by STV's and BBC One's evening nations/regions News programmes in 2008, compared to 2004. This shows that share of audiences varies by nation for BBC and STV. Share for BBC One and STV were more balanced in Scotland than in other devolved nations; in 2008, BBC One had a share of 27% (down from 30% in 2004) while ITV had a share of 26% (up from 24%).

Figure 10.4: Channel 3 and BBC One nations/regions News: viewing share 2004-2008



Source: BARB

Note: ITV regions are used for this analysis, and so BBC One share does not correlate exactly with distinct BBC regional news programmes

Audience impact

Importance of PSB purposes and characteristics

Figure 10.5 compares viewers' opinions in Scotland to those of viewers in the UK overall, on the perceived importance of the PSB purposes. This shows that, in general, a similar proportion of viewers in Scotland as in the UK overall see the purposes as important. Overall, the research statements reflecting purpose 1- *informing our understanding of the world* and the broad cultural elements of purpose 3 are perceived as particularly important by viewers in both Scotland and the UK generally.

The aspects of the purposes that viewers in Scotland tend to give more or less importance to than those in the UK are:

- Purpose 3 – non-News: *Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation* (Scotland 68% vs. UK 62%)
- Purpose 3 - UK culture: *It covers big national events well, like sports, music events or major news stories* (Scotland 74% vs. UK 78%)
- Purpose 2 - Factual: *It shows interesting programmes about history, sciences or the arts* (Scotland 64% vs. UK 70%)
- Purpose 4 – Diversity: *Its programmes offer a range of opinions on subjects and issues* (Scotland 67% vs. UK 73%)

Figure 10.5: Importance of PSB purposes in Scotland vs. UK, 2008

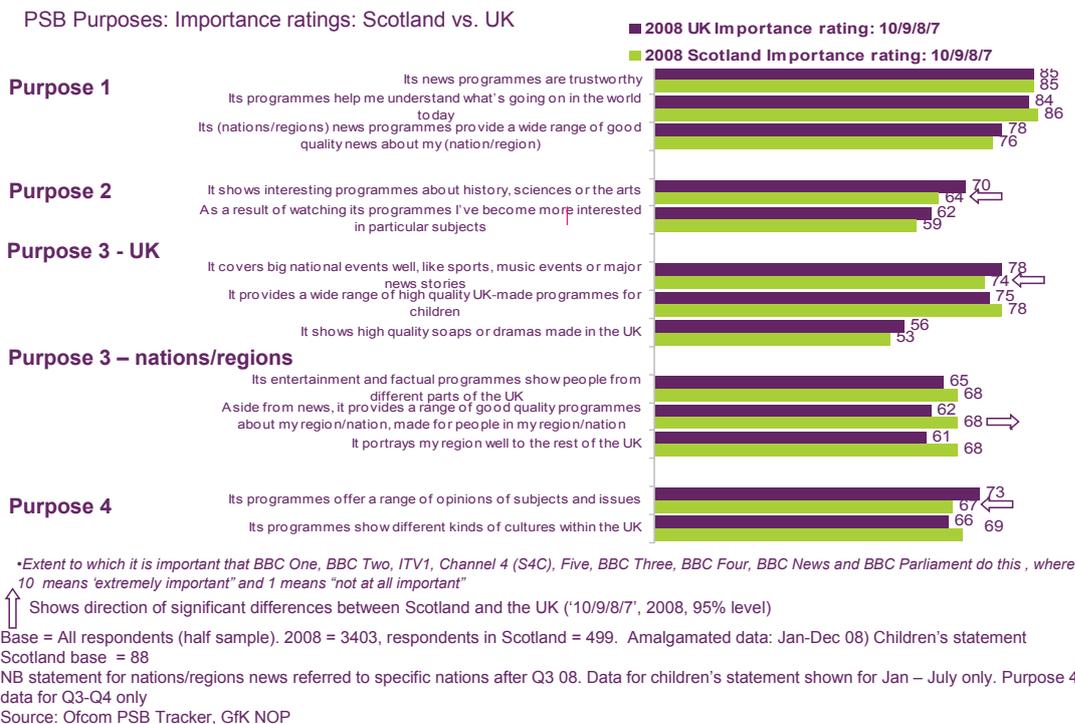
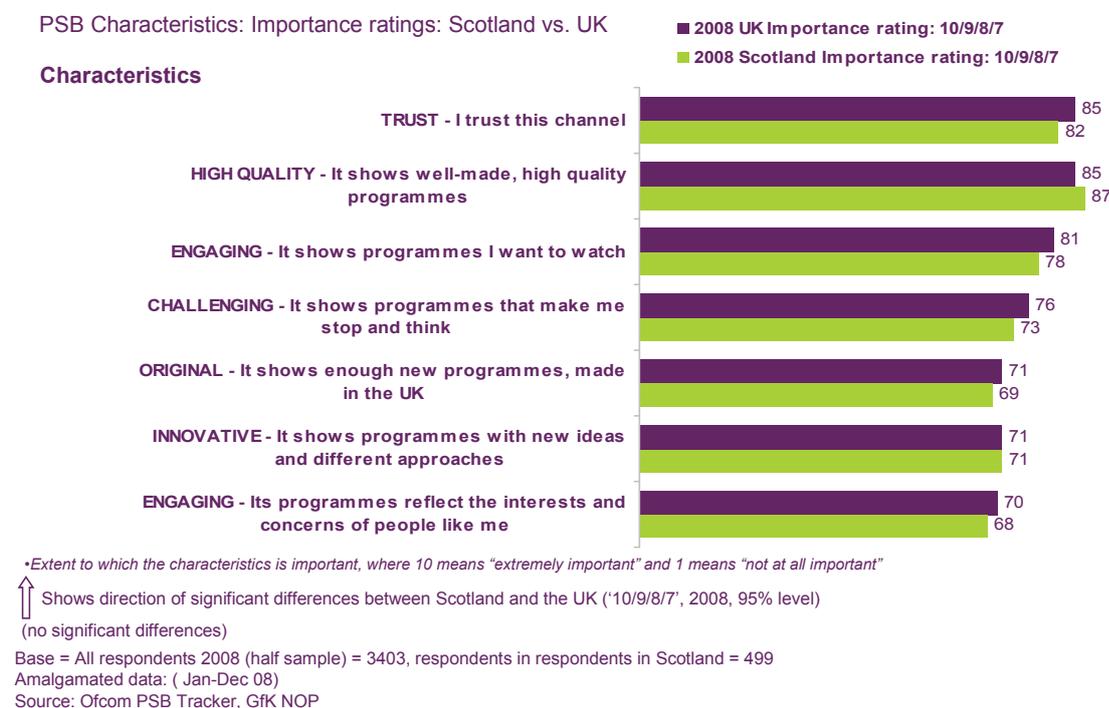


Figure 10.6 shows viewers' opinions in Scotland on the perceived importance of the PSB characteristics, compared to opinions of viewers in the UK generally, in 2008. This shows

that viewers in Scotland tended see the PSB characteristics at a similar level of importance to viewers in the UK generally.

Figure 10.6: Importance of the PSB characteristics in Scotland vs. UK, 2008



The delivery of PSB purposes and characteristics overall

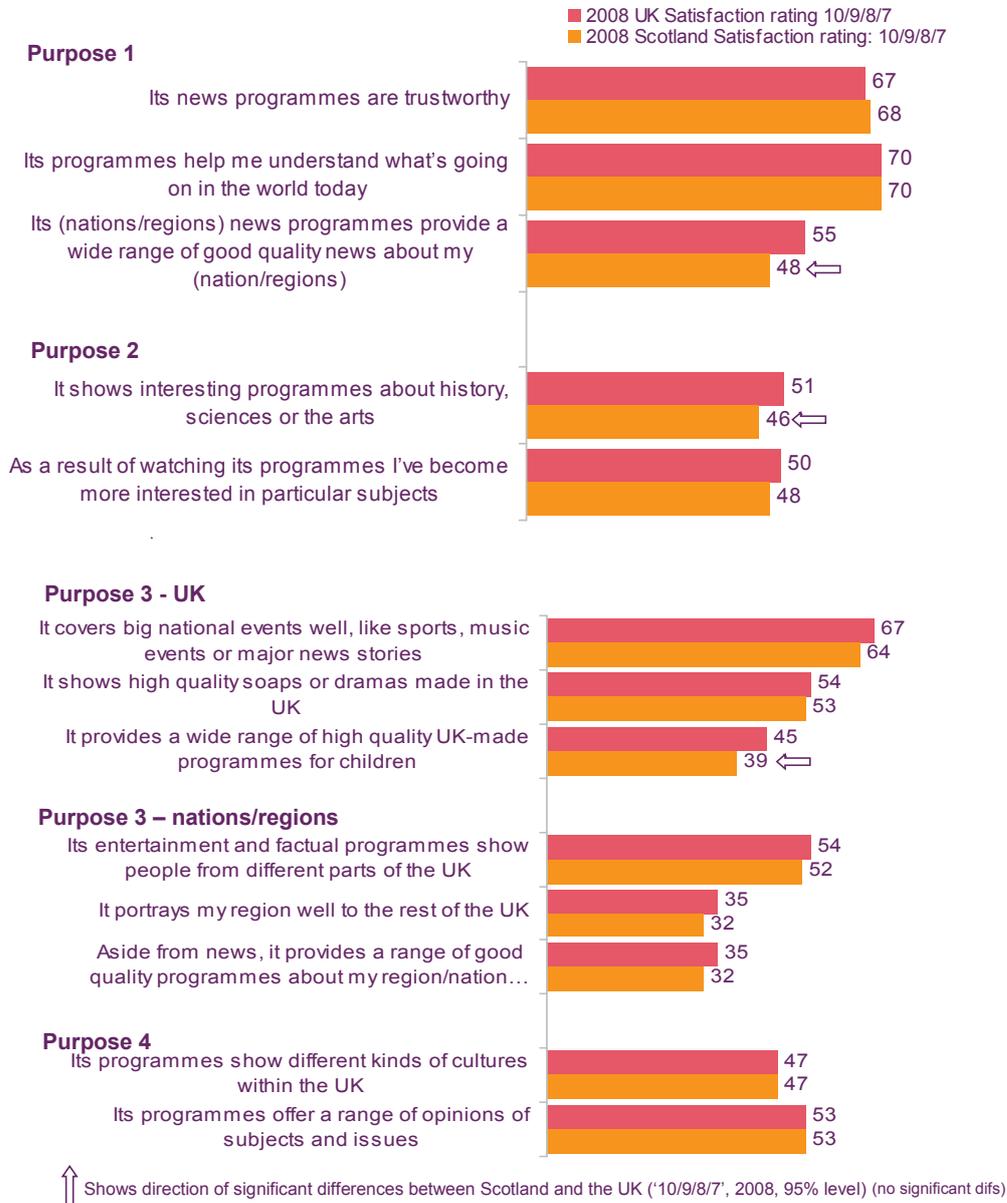
Figure 10.7 compares the opinions of viewers in Scotland to those of viewers in the UK overall on the delivery of the PSB channels together¹⁰⁷ against the PSB purposes. This shows that in general viewers in Scotland were less likely than UK viewers overall to rate the PSB channels highly on three elements of the PSB purposes:

- Purpose 1 – News: *Its nations programmes provide a wide range of good quality news about my nation* (Scotland 48% vs. UK 55%)
- Purpose 2 - Factual: *It shows interesting programmes about history, sciences or the arts* (Scotland 46% vs. UK 51%)
- Purpose 3 – Children’s: *It provides a wide range of high quality UK-made programmes for children* (Scotland 39% vs. UK 45%)

¹⁰⁷ In 2008, PSB Channels refers to BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three, BBC Four, BBC News and BBC Parliament. Until April 2007, BBC News was not included in this measure and until July 2008, BBC parliament was not included in this.

Figure 10.7: Delivery of the PSB purposes in Scotland vs. UK, 2008

PSB Purposes: Ratings of main PSB channels: Scotland vs UK



*Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.

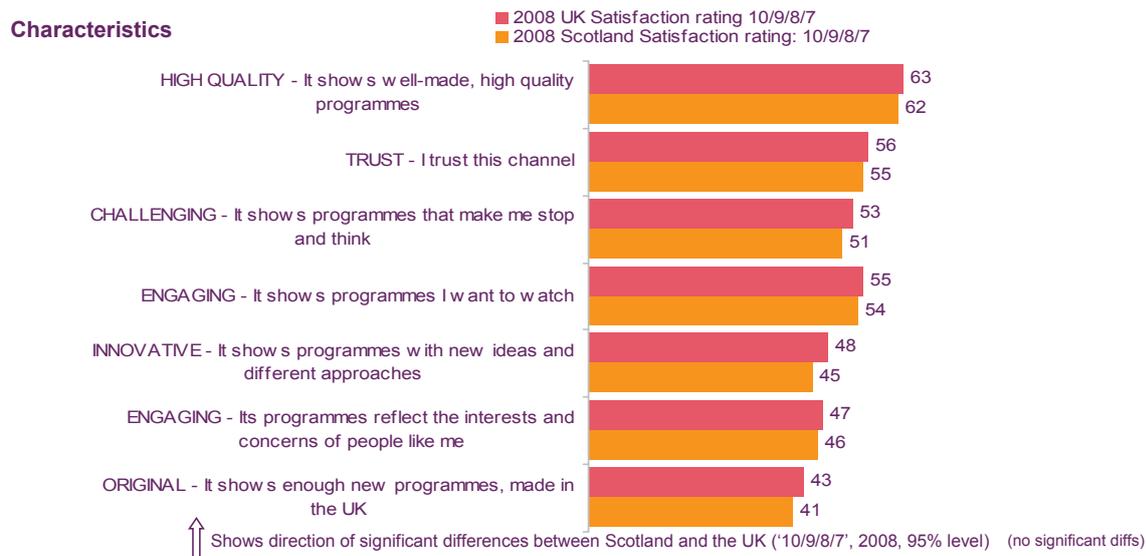
Base = All respondents who ever watch any PSB channels. All Channels Combined ,2008 = 6798, Respondents in Scotland = 997; Amalgamated data: (Jan-Dec 08). Data for P4 statements is from Q3/Q3 2008 only as these were added. Data for children's statement from Q1-Q3 2008
Source: Ofcom PSB Tracker, GfK NOP

Figure 10.8 compares the opinions of viewers in Scotland to those of viewers in the UK overall on the delivery of the PSB channels together¹⁰⁸ on the PSB characteristics. This shows that in general viewers in Scotland were as likely as UK viewers overall to rate the PSB channels highly on each element.

¹⁰⁸ In 2008, PSB Channels refers to BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three, BBC Four, BBC News and BBC Parliament. Until April 2007, BBC News was not included in this measure and until July 2008, BBC parliament was not included in this.

Figure 10.8: Delivery of the PSB characteristics in Scotland vs. UK, 2008

PSB Characteristics: Ratings of main PSB channels: Scotland vs UK



*Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.

Base = All respondents who ever watch any PSB channels. All Channels Combined, 2008 = 6798, Respondents in Scotland = 997;

Amalgamated data: (Jan-Dec 08)

Source: Ofcom PSB Tracker, GfK NOP

The delivery of purpose 1 and purpose 3 by individual channels

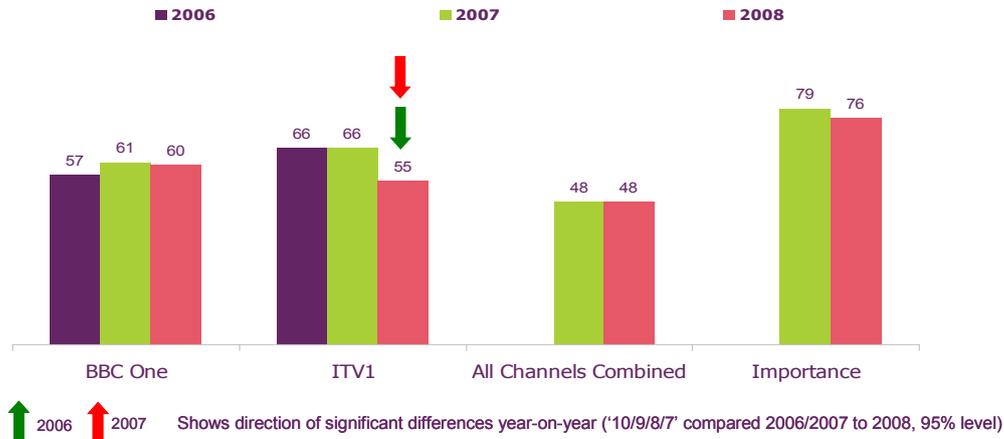
Figure 10.9 shows the opinions of viewers in Scotland on the delivery of nations News. This identifies that regular viewers of ITV1¹⁰⁹ in 2008 did not rate the channel as highly as in previous years on having a wide range of good quality News about Scotland (55% in 2008 in comparison to 66% in 2007). In 2006, ITV1 was rated more positively on this measure by its regular viewers than BBC One was by its regular viewers; this was no longer the case in 2008. This figure also shows opinions of the nations News delivery of all the PSB channels taken together and identifies that around half (48%) continue to rate the channels together as delivering this well.

¹⁰⁹ Within the PSB Tracker, Channel 3 is more simply referred to as ITV1 for all respondents in all nations. Note: within Scotland Channel 3 is STV.

Figure 10.9: Opinions on purpose 1 : nations News programmes in Scotland

Its news programmes for people in Scotland provide a wide range of good quality news about Scotland

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



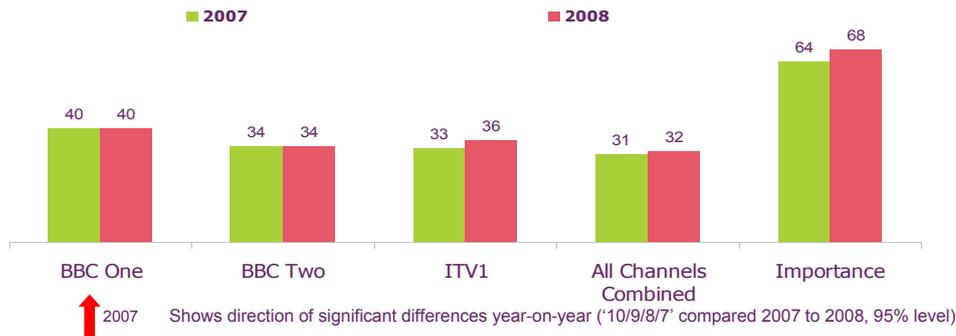
Base for 'all channels combined' = all respondents in Scotland who ever watch any PSB channels: 1022, 997
 Base for importance: 772, 499 (half sample for Q1 and Q4 of 2007 and half sample for all of 2008)
 Base for individual channels: Self-reported regular viewers of each channel in Scotland BBC1 = 757, 698, 687 ITV1 = 599, 534, 508
 NB Before July 08 this statement was asked to all as 'Its regional news programmes provide a wide range of good quality news about my area' but was changed for greater clarity for those in the devolved nations. Source: Ofcom PSB Tracker, GfK NOP

There were no significant changes in the ratings given by regular viewers of each of BBC One, BBC Two and ITV1 in Scotland on the delivery of nations non-News programming in 2008, compared to in 2007. Just over a third of regular viewers of BBC Two (34%) and ITV (36%) in Scotland, and 40% of BBC One's regular viewers, said that the channels provided a range of good quality non-News programming for people in the area.

Figure 10.9: Opinions on purpose 3 : nations non-News programmes in Scotland

Aside from news, it provides a range of good quality programmes about my region, made for people in my region

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents in Scotland who ever watch any PSB channels = 499, 997,
 Base size for importance: 375, 499 (half sample for Q4 of 2007 and half sample for all of 2008)
 Base for individual channels: Self-reported regular viewers of each channel in Scotland (amalgamated data: Jul, Oct 07, Jan, Apr, Jul, Oct 08)
 BBC1 = 324, 687 BBC2 = 154, 323 ITV1 = 258, 508 (statement added in Q307)
 Source: Ofcom PSB Tracker, GfK NOP

Section 11

Nations: Wales and S4C

Introduction

This section looks in more in detail at PSB output, viewing and viewer opinion within Wales. An overview of PSB is given, but specific attention is paid to areas most pertinent to the devolved nations, that is provision of *nations/regions News* and *non-News* and elements of purpose 1 – *informing our understanding of the world* and purpose 3 – *reflecting cultural identity*.

Within this section we also provide information about S4C – in terms of output, viewing and viewer opinion among those who watch Welsh language programming on the channel.

Summary findings

Output

- In Wales, both the BBC and the ITV1 Wales nations/regions output have declined over the last five years. On BBC One and Two reductions have been greater for News output, while on ITV1 Wales, the non-news and Current Affairs genres accounted for the largest falls. From 2004 to 2008, BBC saw a decrease in total hours of nations/regions output, of 130 hours or 15%.

Viewing

- In 2008, individuals in Wales spent a slightly higher proportion of their viewing time watching UK/network News and Sports than people in other devolved nations. Individuals in Wales also spent less of their viewing time on Other Factual programming and Entertainment programming.
- Individuals in Wales consumed the least volume of nations/regions News on the BBC Channels and Channel 3 of all of the devolved nations; 25 hours per year for the average individual in 2008.
- People in Wales were more likely to watch BBC One nations News (36% share) than ITV1 Wales nations news (17% share), although share for BBC One has decreased from 2004 to 2008 by 3%.

Audience impact

- This shows that, in general, viewers in Wales ascribe the PSB purposes and characteristics a similar level of importance as viewers in the UK overall. The research statements reflecting purpose 1- *informing our understanding of the world* and the broad cultural elements of Purpose 3 are perceived as particularly important by viewers in Wales and the UK generally. The aspects of the purposes that viewers in Wales give more importance to are:
 - Purpose 1 - *News: Its programmes help me understand what's going on in the world today* (89%)
 - Purpose 3 - *UK culture: It shows high quality Soaps or Drama made in the UK* (62%)

- Purpose 3 - *non-News Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation* (67%)
- Purpose 3 - *Portrayal: It portrays my region well to the rest of the UK* (69%)
- In general, viewers in Wales were at least as likely as UK viewers overall to rate the PSB channels together highly on each element of the PSB purposes; viewers in Wales rated the channels more positively on a number of aspects, particularly relating to purpose 1 – *informing our understanding of the world*, purpose 3 – *reflecting cultural identity* and some of the characteristics (*quality, trust, engaging and original*)
- In 2006, ITV1¹¹⁰ and BBC One were rated similarly by their respective regular viewers on their nations News provision, but in 2008 BBC One started to be rated more positively than ITV1 on this measure.
- In addition, more regular viewers of BBC One (45%) rated the provision of non-News for the nation well than regular viewers of ITV1 (35%) in 2008. There were no significant changes in the ratings given by regular viewers of each of BBC One, BBC Two and ITV1 in Wales on nations non-News programming since 2007.

S4C

- The overall volume of Welsh language programming increased in 2008 and accounted for 5,326 hours of the S4C service in 2008. The majority of Welsh language programmes are repeats (3,237 hours) and output commissioned from independent producers (1,355 hours)
- There was also an increased volume of *originated* Welsh language content in 2008; in particular Children’s programming has increased by 69% (155 hours) since 2007 and by 175% (242 hours) since 2004.
- In 2008 S4C Welsh language programmes were watched for an average of 21.4 hours per year in 2008; this was an increase on the average hours watched in 2007 (19.3 hours) and 2004 (17.6 hours).
- The weekly reach of Welsh language programming on S4C remained stable at 20% in both 2007 and 2008, although this is lower than weekly reach in 2004 (25%).
- For regular viewers of S4C Welsh language programming in 2008, the strongest PSB associations with the channel were connected to purpose 1 and purpose 3, for example, the provision of good quality nations News (68%) and non-News for and about the nation (78%). Regular viewers of Welsh language programmes on S4C also tended to say that they *trusted* the channel (68%) and saw the channel as providing high *quality* (68%)

Output

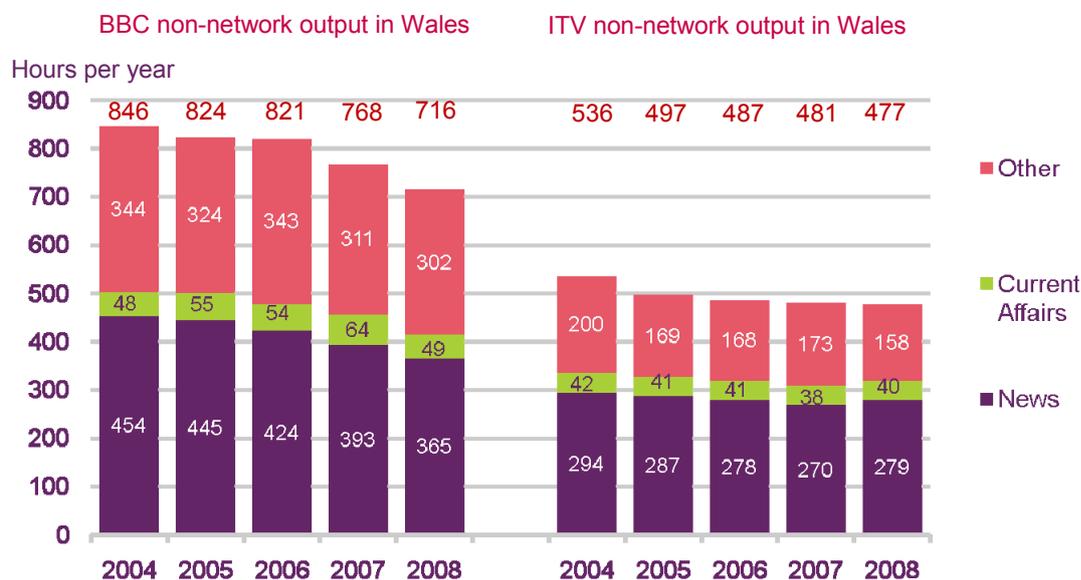
In Wales, the volume of both the BBC and ITV1 Wales nations/regions output (or ‘non-network output’) has declined over the last five years (see Figure 10.1). On BBC One and Two reductions were greater for News output, while on ITV1 Wales, the non-News and

¹¹⁰ Within the PSB Tracker, Channel 3 is more simply referred to as ITV1 for all respondents in all nations. Note: within Wales Channel 3 is ITV1 Wales.

Current Affairs genres accounted for the largest falls. From 2004 to 2008, BBC saw a decrease in total hours of nations/regions output of 130 hours or 15%.

The changes on ITV1 Wales have occurred as a result of quota reductions, in line with changes in other ITV regions and nations.

Figure 11.1: Non-network output in Wales, 2004-2008



Source: Broadcaster returns
 Note: Figures exclude repeats

Viewing

Figure 11.2 sets out the relative proportions of viewing of the different genres on the five main PSB channels across the devolved nations in 2008.

There appears to be quite a lot of consistency in patterns of viewing across different nations, with a few exceptions:.

In Wales, individuals spent a slightly higher proportion of their viewing time watching UK/network News and Sport than people in other devolved nations. Individuals in Wales also appear to have spent less of their viewing time on Other Factual programming and Entertainment programming.

Figure 11.2: Proportion of total network viewing on the five main PSB channels, by devolved nation, 2008

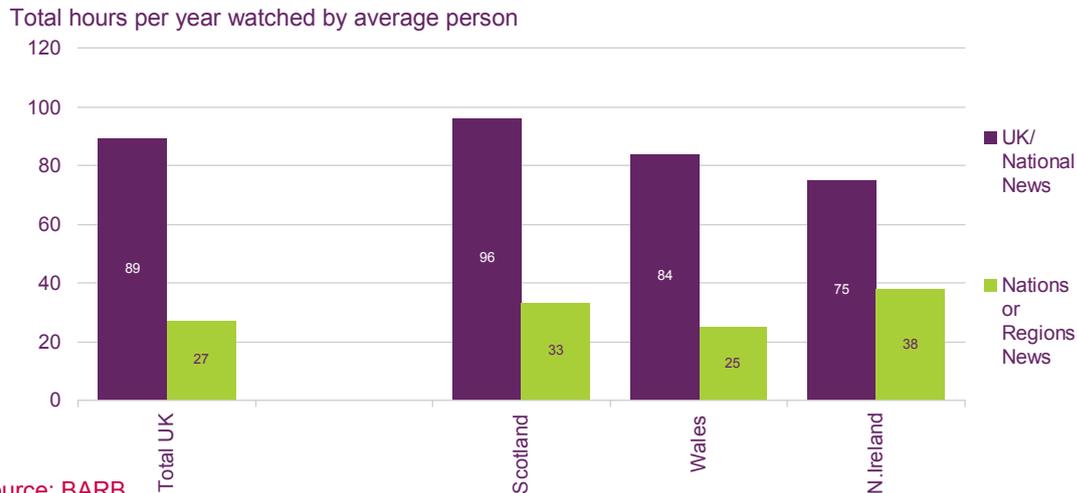


Source: BARB, 2008

Figure 11.3 looks at the average hours per year spent viewing nations/regions News by individuals on BBC and ITV1 Wales compared to UK/national news on the main PSB channels. Note: Within this analysis, News on S4C is included within the data on the UK/national news.

Individuals in Wales consume the smallest volume of nations/regions News on the BBC channels and ITV1 Wales; 25 hours per year for the average individual.

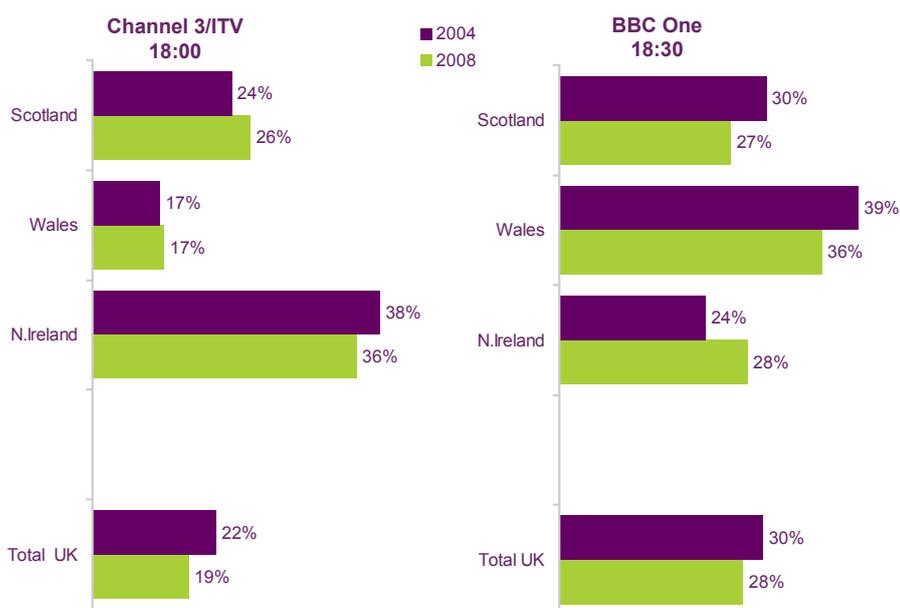
Figure 11.3: Total hours of viewing of BBC/Channel 3 nations/regions news versus UK/national News, by nation, 2008



Source: BARB

Figure 11.4 shows the share of all viewing gained by ITV1 Wales and BBC One evening nations/regions News programmes in 2008, compared to 2004. This shows that share of audiences varies by nation for BBC and ITV. Individuals in Wales are more likely to watch BBC One nations news (36% share) than ITV Wales nations news (17% share), although share for BBC One has decreased from 2004 to 2008 by 3%.

Figure 11.4: ITV1 and BBC One nations/regions News: viewing share 2004-2008



Source: BARB

Note: ITV regions are used for this analysis, and so BBC One share does not correlate exactly with distinct BBC regional news programmes

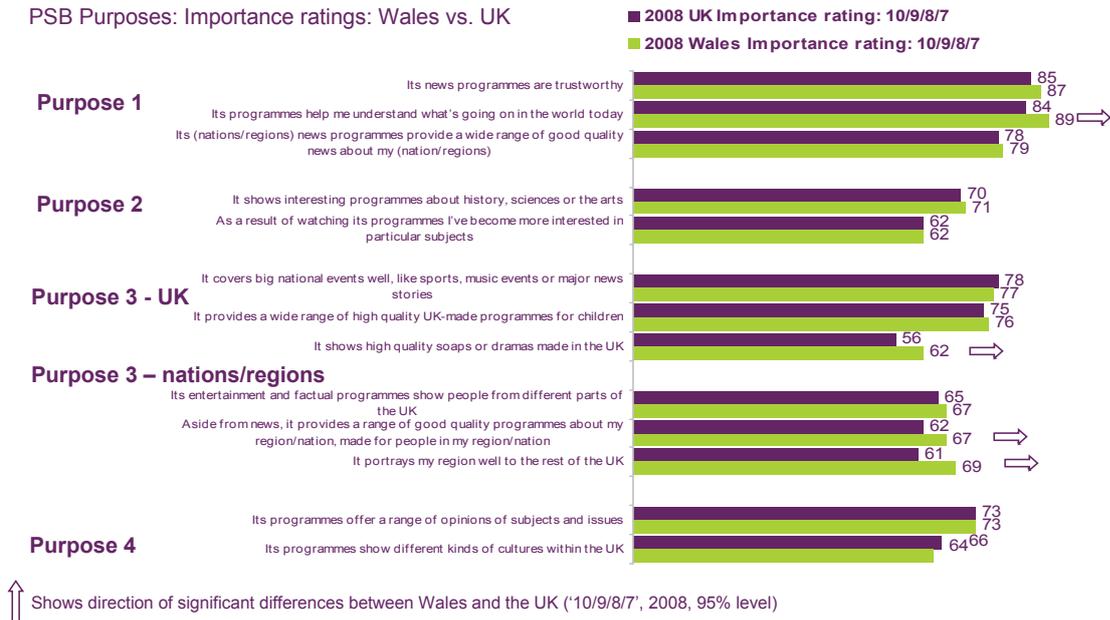
Audience impact

Importance of PSB purposes and characteristics

Figure 11.5 compares viewers' opinions in Wales to those of viewers in the UK overall on the perceived importance of the PSB purposes. This shows that, in general, viewers in Wales ascribe the purposes a similar level of importance to viewers in the UK more widely. Overall the research statements reflecting purpose 1 - *informing our understanding of the world* and the broad cultural elements of purpose 3 are perceived as particularly important by viewers in Wales and the UK generally. The aspects of the purposes that viewers in Wales give more importance to are:

- Purpose 1 - *News: Its programmes help me understand what's going on in the world today* (89%)
- Purpose 3 - *UK culture: It shows high quality Soaps or Drama made in the UK* (62%)
- Purpose 3 - *non-News Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation* (67%)
- Purpose 3 - *Portrayal: It portrays my region well to the rest of the UK* (69%)

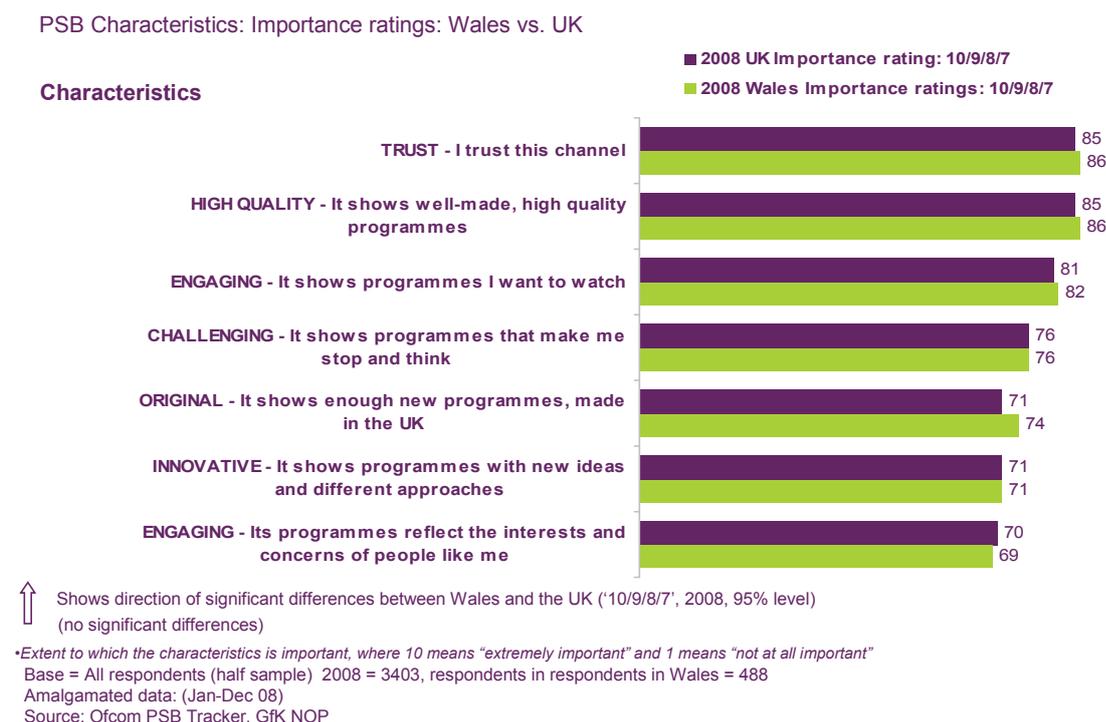
Figure 11.5: Importance of PSB purposes in Wales vs. UK, 2008



•Extent to which it is important that BBC One, BBC Two, ITV1, Channel 4 (S4C), Five, BBC Three, BBC Four, BBC News and BBC Parliament do this, where 10 means 'extremely important' and 1 means 'not at all important'
 Base = All respondents (half sample). 2008 = 3403, respondents in Wales = 488. Amalgamated data: Jan-Dec 08). Children's statement base for Wales = 97. Data for children's statement shown for Jan – July only. NB statement for nations/regions news referred to specific nations after Q3 08. Purpose 4 data for Q3 and Q4 2008 only
 Source: Ofcom PSB Tracker, GfK NOP

In figure 10.6 we compare viewers' opinions in Wales on the perceived importance of the PSB characteristics to opinions of viewers in the UK more generally. This shows that viewers in Wales see the PSB characteristics at a similar level of importance to viewers in the UK generally.

Figure 11.6: Importance of the PSB characteristics in Wales vs. UK, 2008



The delivery of PSB purposes and characteristics overall

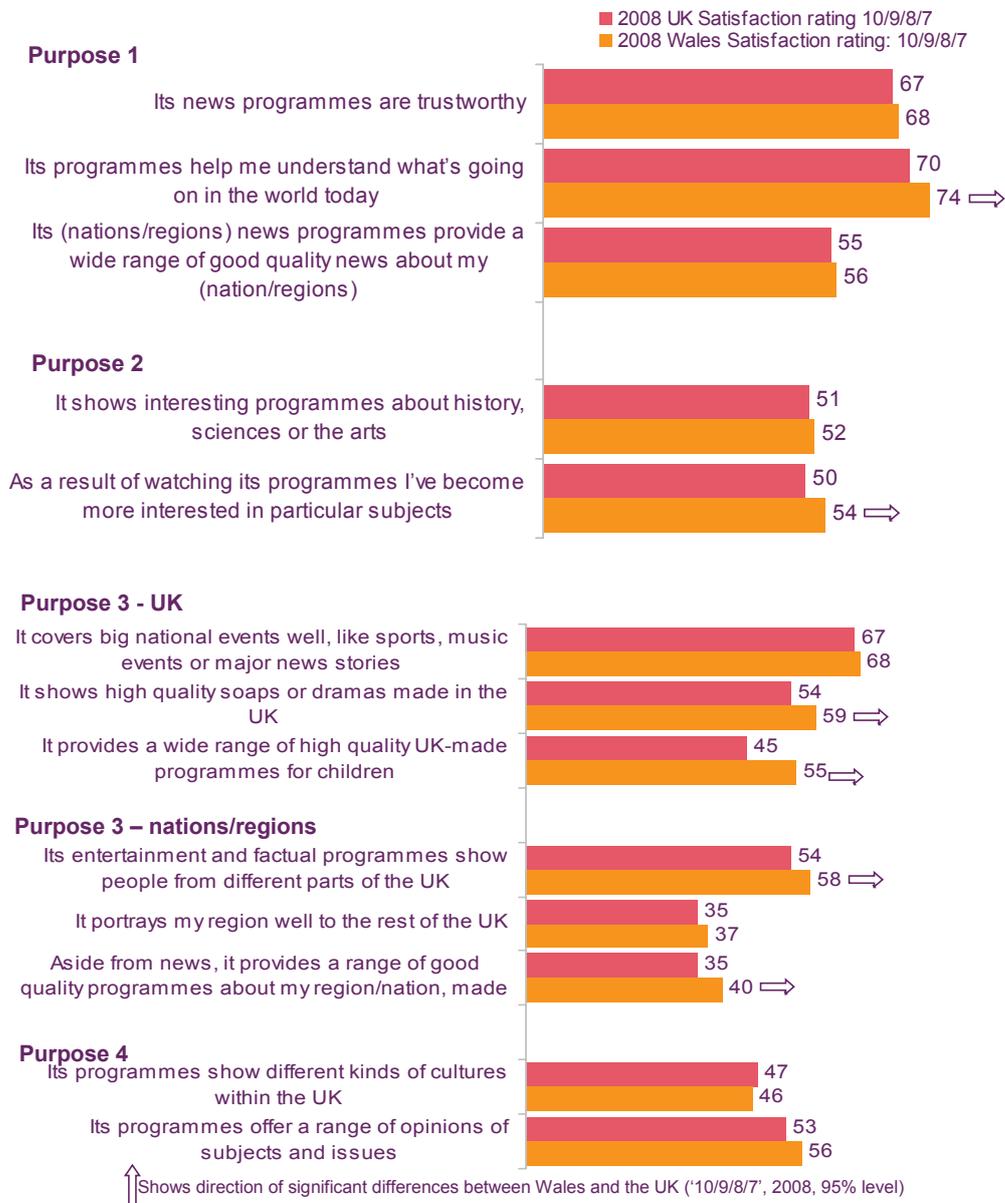
Figure 11.7 compares the opinions of viewers in Wales to those of viewers in the UK overall on the delivery of the PSB channels together¹¹¹ against the PSB purposes. This shows that in general viewers in Wales are at least as likely as UK viewers overall to rate the PSB channels highly on each element of the PSB purposes. Viewers in Wales were more likely than those in the UK overall to rate the channels highly on:

- Purpose 1 – *News: Its programmes help me understand what's going on in the world today (74%)*
- Purpose 2 – *Interest: As a result of watching its programmes I've become more interested in particular subjects (54%)*
- Purpose 3 - *UK culture: It shows high quality Soaps or Drama made in the UK (59%)*
- Purpose 3 - *UK culture: Provides a wide range of high quality and UK-made programmes for children (55%)*
- Purpose 3 – *non-News Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation (40%)*
- Purpose 3 – *Representation: Its entertainment and factual programmes show people from different parts of the UK (58%)*

¹¹¹ In 2008, PSB Channels refers to BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three, BBC Four, BBC News and BBC Parliament. Until April 2007, BBC News was not included in this measure and until July 2008, BBC parliament was not included in this.

Figure 11.7: Delivery of the PSB purposes in Wales vs. UK, 2008

PSB Purposes: Ratings of main PSB channels: Wales vs UK



*Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.

Base = All respondents who ever watch any PSB channels. All Channels Combined 2008 = 6798, Respondents in Wales = 975. Amalgamated data: (Jan-Dec 08). Data for P4 statements is from Q3/Q3 2008 only as these were added. Data for children's statement from Q1-Q3 2008
 Source: Ofcom PSB Tracker, GfK NOP

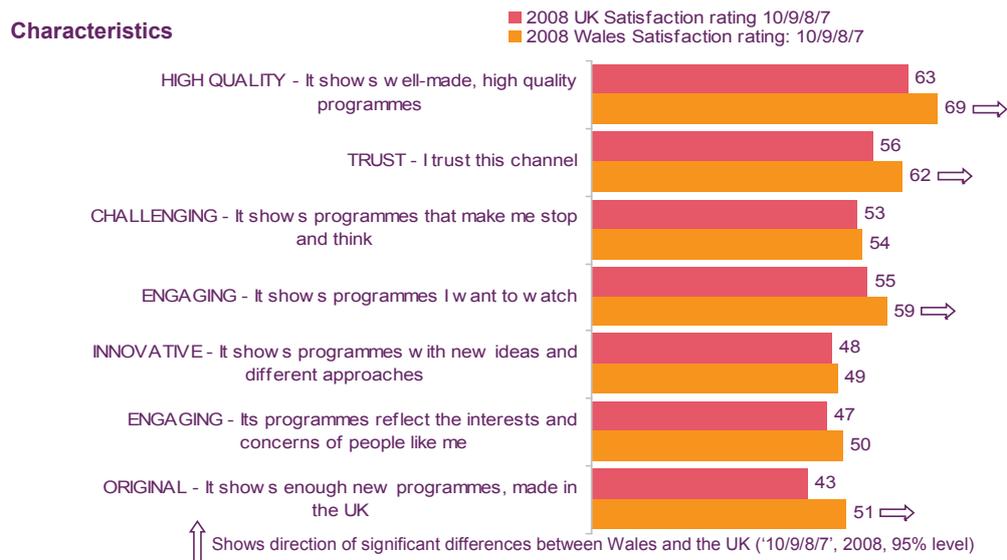
Figure 11.8 compares the opinions of viewers in Wales to those of viewers in the UK overall on the delivery of the PSB channels together¹¹² on the PSB characteristics. This shows again that in general viewers in Wales are at least as likely as UK viewers overall to rate the PSB channels highly on each element. Viewers in Wales are more likely than those in the UK overall to rate the channels highly on:

¹¹² In 2008, PSB Channels refers to BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three, BBC Four, BBC News and BBC Parliament. Until April 2007, BBC News was not included in this measure and until July 2008, BBC parliament was not included in this.

- Quality: *It shows well-made, high quality programmes* (69%)
- Trust: *I trust this channel* (62%)
- Engaging: *It shows programmes I want to watch* (59%)
- Original: *It shows enough new programmes, made in the UK* (51%)

Figure 10.8: Delivery of the PSB characteristics in Wales vs. UK, 2008

PSB Characteristics: Ratings of main PSB channels: Wales vs UK



*Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.
 Base = All respondents who ever watch any PSB channels. All Channels Combined 2008 = 6798, Respondents in Wales = 975;
 Amalgamated data: (Jan-Dec 08)
 Source: Ofcom PSB Tracker, GfK NOP

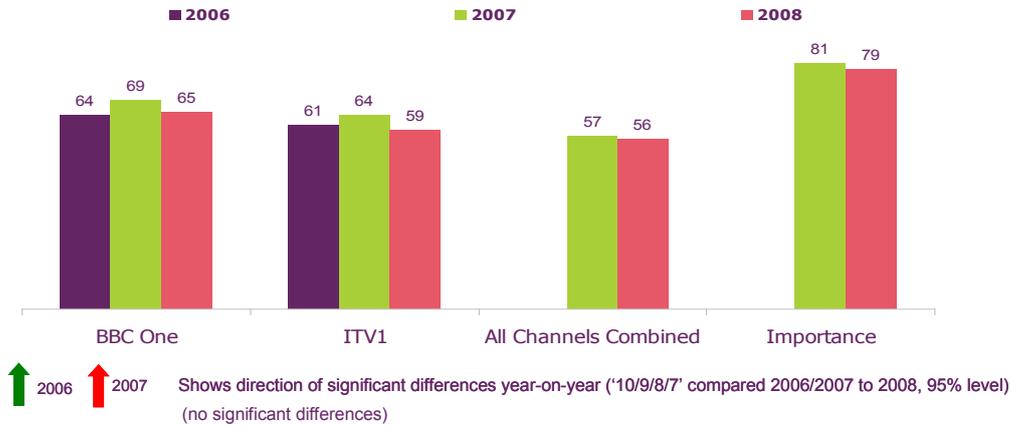
The delivery of purpose 1 and purpose 3 by individual channels

The opinions of viewers in Wales on the delivery of nations News is shown in Figure 10.9. In 2006, ITV1 and BBC One were rated similarly by their respective regular viewers, but in 2008 BBC One started to be rated more positively than ITV1 on this measure. This figure also shows that around a little over half (56%) continue to rate the channels together as delivering this well.

Figure 11.9: Opinions on purpose 1 : nations News programmes in Wales

Its news programmes for people in Wales provide a wide range of good quality news about Wales

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



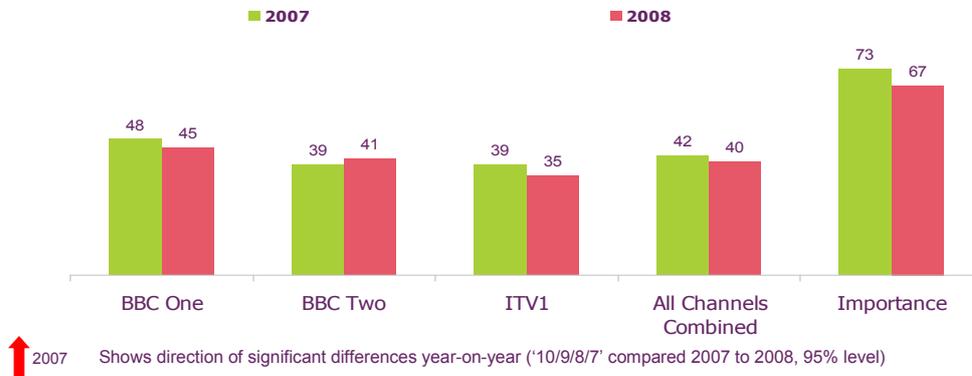
Base for 'all channels combined' = all respondents in Wales who ever watch any of the nine channels : 1006, 975
 Base for importance: 752, 488 (half sample for Q1 and Q4 of 2007 and half sample for all of 2008)
 Base for individual channels: Self-reported regular viewers of each channel in Wales BBC1 = 791, 744, 741 ITV1 = 616, 568, 596
 NB Before July 08 this statement was asked to all as 'its regional news programmes provide a wide range of good quality news about my area' but was changed for greater clarity for those in the devolved nations. Source: Ofcom PSB Tracker, GfK NOP

In 2008 in Wales, more regular viewers of BBC One (45%) rated the provision of non-News for the nation highly than did regular viewers of ITV1 (35%). There were no significant changes in the ratings given by regular viewers of each of BBC One, BBC Two and ITV1 in Wales on nations non-News programming in 2008, compared to 2007.

Figure 11.9: Opinions on purpose 1 : nations non-News programmes in Wales

Aside from news, it provides a range of good quality programmes about my region, made for people in my region

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents in Wales who ever watch any of the nine channels = 516, 975,
 Base size for importance: 383, 488 (half sample for Q4 of 2007 and half sample for all of 2008)
 Base for individual channels: Self-reported regular viewers of each channel in Wales (amalgamated data: Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 378, 741 BBC2 = 180, 357 ITV1 = 265, 596 (statement added in Q307)
 Source: Ofcom PSB Tracker, GfK NOP

S4C and Welsh language viewing

This section looks at S4C in Wales in terms of output, viewing and audience perceptions among those who watch Welsh language programming on the channel.

The Welsh Authority has the statutory responsibility to provide S4C (analogue) and S4C Digidol (digital) services for viewers in Wales¹¹³. Along with around 48 hours per week of Welsh language programmes at peak times, S4C analogue broadcasts re-scheduled and live Channel 4 programmes at other times, while S4C Digidol broadcasts around 102 hours per week of Welsh language programmes¹¹⁴. S4C is a 'commissioner broadcaster' and the majority of its programmes are sourced from independent producers. In addition, the BBC supplies a minimum of 10 hours per week of programmes, free of charge, to the Authority; these are funded out of the BBC's licence revenue, along with additional programmes commissioned by S4C. ITV Wales also contributes programmes to S4C.

Details of S4C's statutory requirements, as outlined in the Communications Act, are as shown in Figure 11.11.

Figure 11.11: S4C's statutory requirements

On Analogue:	On Digital:
Provision of a broad range of high quality and diverse programming	Provision of a broad range of high quality and diverse programming
A service in which a substantial proportion of the programmes consist of programmes in Welsh	A service in which a substantial proportion of the programmes consist of programmes in Welsh
The programmes broadcast between 6.30pm and 10pm every day consist mainly of programmes in Welsh	
The programmes that are not in Welsh are normally programmes which are being, have been, or are about to be, broadcast on Channel 4	

The Act also specifies that its services must include News and Current Affairs programming. There is no requirement for S4C regarding Children's programmes, however in its 2008 Annual Report, S4C sets its own target is 140 hours of originated Children's programmes per year.

In order to provide relevant information about audience views relating to S4C programming in Welsh, the PSB Tracker has been boosted in Wales from January 2006. Opinions are based on *regular viewers of Welsh language programming* on either the analogue or the digital channel, rather than regular viewers of S4C as a whole. The PSB Tracker results reported here are therefore based on the Welsh boost rather than the UK-wide research.

Output hours

Figure 11.12 shows that the volume of Welsh language programming increased in 2008 and accounted for 5,326 hours of the S4C service in 2008. This continues the longer-term trend of increased hours of Welsh programming since 2004.

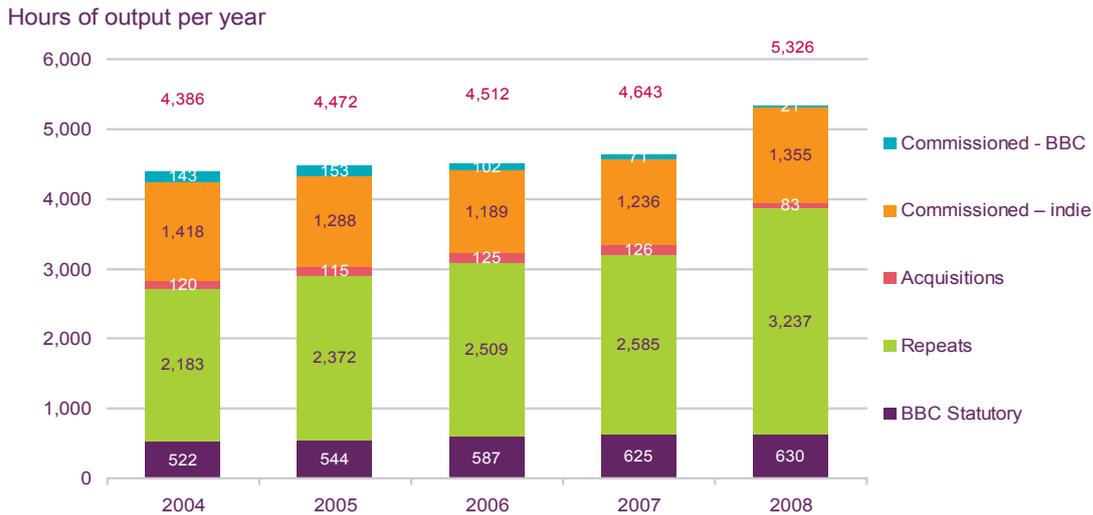
This figure also illustrates the amounts of commissioned, acquired and repeated Welsh language programming shown, along with the number of BBC statutory hours provided. The majority of Welsh-language programmes in 2008 were repeats (3,237 hours) and output

¹¹³ S4C Digidol is also available outside Wales on digital satellite on channel 134, and is streamed live on broadband at s4c.co.uk and on some IPTV networks.

¹¹⁴ All Welsh language output shown on analogue is also shown simultaneously on S4C Digital. The rest of the schedule comprises new programming, extended coverage of certain cultural and sporting events, repeats and archive material.

commissioned from independent producers (1,355 hours). Both of these types of output increased in 2008 from their 2007 levels; repeats increased by 25% (652 hours) and commissions from independent producers increased by 10% (119 hours). Compared to 2004 levels, fewer hours of programming were commissioned through the BBC or were acquisitions, while more hours were BBC statutory hours (630).

Figure 11.12: Type of Welsh language output on S4C, 2004-2008

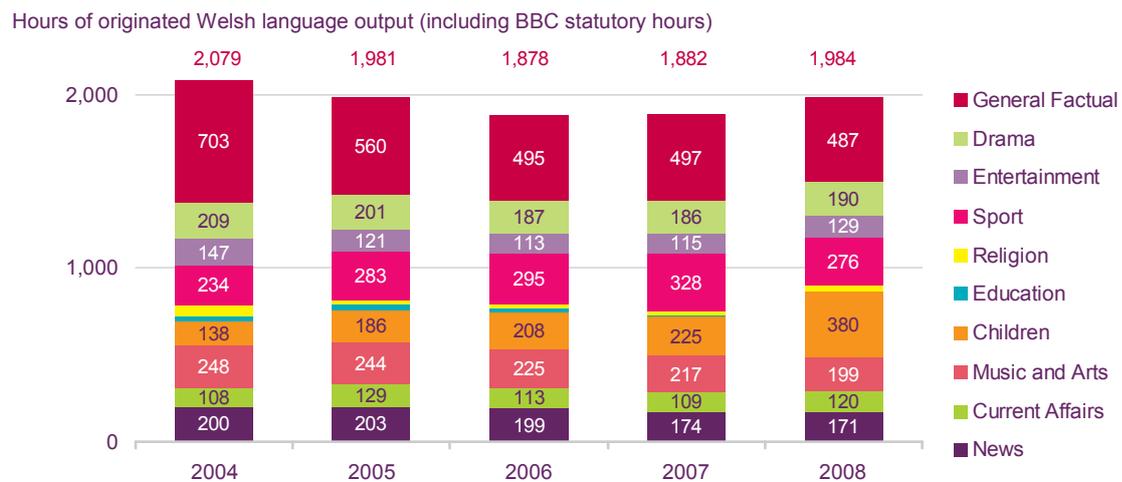


Source: S4C (2008)

Notes: The BBC statutory hours are not broken down into acquisitions, commissions or repeats

Originated Welsh language output, by genre, since 2004 is shown in Figure 11.13 (excluding repeats and acquisitions). This shows an overall increased volume of originated Welsh language content, and identifies the continued high levels of originated Factual programming in 2008 and highlights the further increases in originated Children’s programming. Children’s programming has increased by 69% (155 hours) since 2007 and by 175% (242 hours) since 2004.

Figure 11.13: Annual hours of originated Welsh language output on S4C, 2004-2006



Source: S4C (2008)

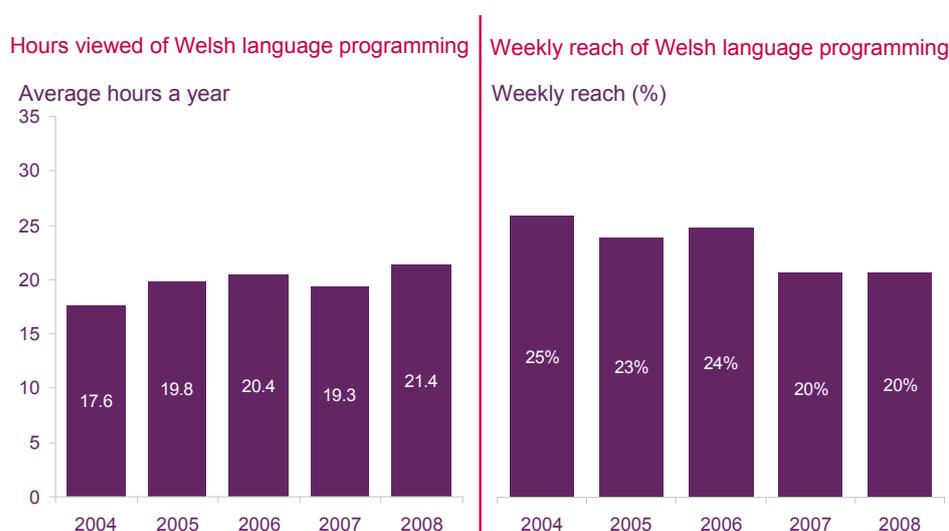
Note: includes BBC statutory hours. BBC statutory hours are not broken down into acquisitions, commissions or repeats, therefore a nominal number of the hours in this chart may consist of repeated material.

Viewing figures

Viewing data are taken from the BARB measurement system, which examines S4C Welsh output as a whole, combining both analogue and digital, in order to provide an overall picture of the amount of Welsh programming viewed¹¹⁵. These data are illustrated in figures 11.14 to 10.5

In 2008 S4C Welsh language programmes were watched for an average of 21.4 hours per year (the equivalent of 25 minutes per week) by all individuals in the S4C region; this is an increase on the average hours watched in 2007 (19.3 hours). The weekly reach of Welsh language programming on S4C among all individuals in the S4C region was at 20% in both 2007 and 2008; this is a decrease from the reach of 24% in 2006 and fits with the longer-term trend of declining weekly reach of S4C Welsh language programming.

Figure 11.14: Viewing of Welsh language output on S4C, 2004-2008



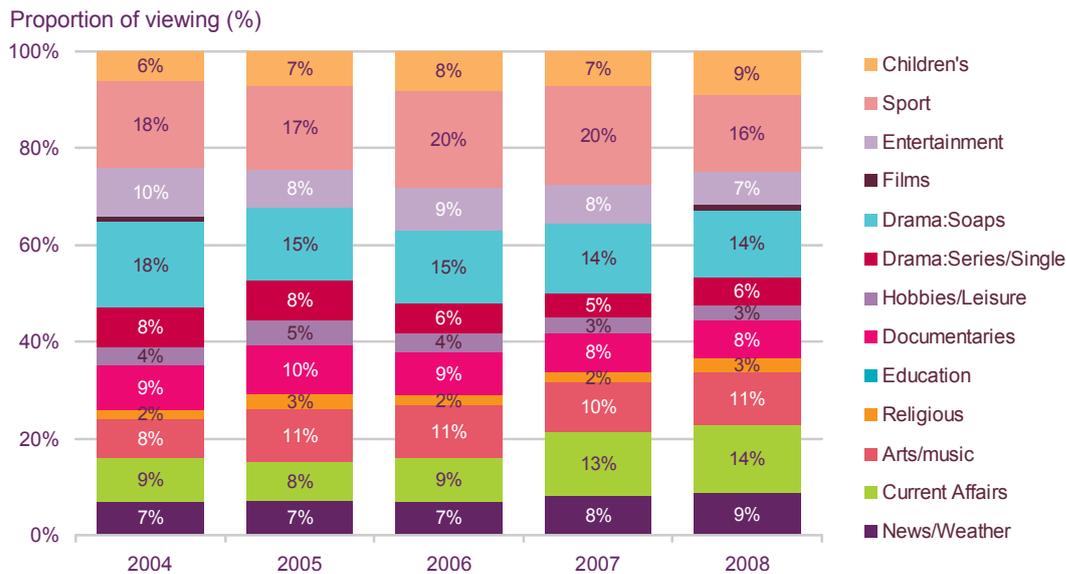
Source: S4C/BARB. S4C Region. All Individuals

In 2008, S4C's share of all viewing (i.e. not just to Welsh language programming) among all individuals in the S4C region was 2.7% and its share of peak-time viewing (which by definition is focused on Welsh language programming) in 2008 was 3.3%.

Figure 11.15 indicates the proportions of viewing of different genres on S4C in 2007. Drama, including Soaps and single dramas (20%), Sport (16%), Current Affairs (14%) and Arts and Music (11%) were the most-watched genres. In 2008, there was less viewing of Sports (16%) than in both 2006 and 2007 (20% in each year).

¹¹⁵ Source: S4C analysis of BARB.

Figure 11.15: Proportion of viewing of genres on S4C, 2004 to 2008



Source: S4C/BARB/Infosys (BARB). S4C Region, All individuals

Audience impact

Since 2007 the PSB Tracker has asked viewers of Welsh language programming on S4C how they rate S4C on achieving the PSB purposes and characteristics, and how they rate the PSB channels together on the same measures. It should be remembered that the channels *together* are required to deliver these characteristics, rather than any channel alone, and these do not form a key part of S4C's remit. The remit of S4C and its role in a devolved nation mean that opinions relating to purpose 1 'Informing our understanding of the world' and purpose 3: 'Reflecting UK cultural identity' are particularly relevant.

Figures 11.16 and 11.17 show how regular viewers of Welsh programming on S4C rate S4C and the PSB channels together on the PSB purposes and characteristics.

For regular viewers of S4C Welsh language programming in 2008, the strongest PSB associations with the channel are connected with purpose 1 and purpose 3:

- Purpose 3 – non-News: *Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation (78%)*
- Purpose 1 – News: *Its nations programmes provide a wide range of good quality news about my nation (68%)*
- Purpose 1 – News: *Its news programmes are trustworthy (63%)*
- Purpose 3 – Portrayal: *portrays Wales well to the rest of the UK¹¹⁶ (60%)*

¹¹⁶ S4C Digital is available across the UK on digital satellite systems, and so while this statement may not seem particularly applicable to the S4C channel, nonetheless responses show that viewers of its Welsh language programmes feel this is achieved by the channel. It may also be the case that respondents simply focused their response on the first part of the statement.

- Purpose 3 – UK Culture: *It covers big national events well, like sports, music events or major news stories (63%)*

Figure 11.16: Welsh language viewer opinions of delivery of PSB purposes

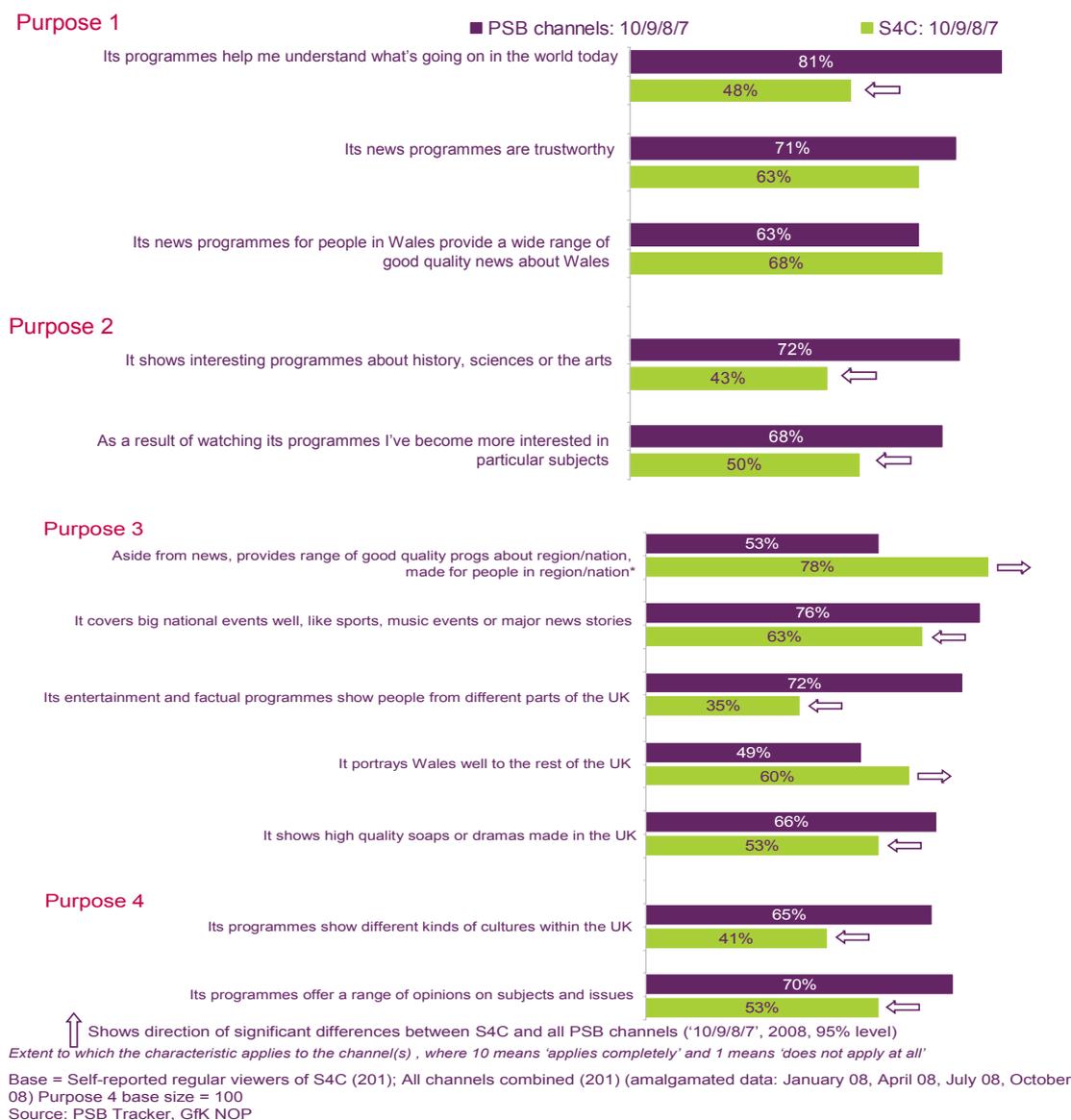
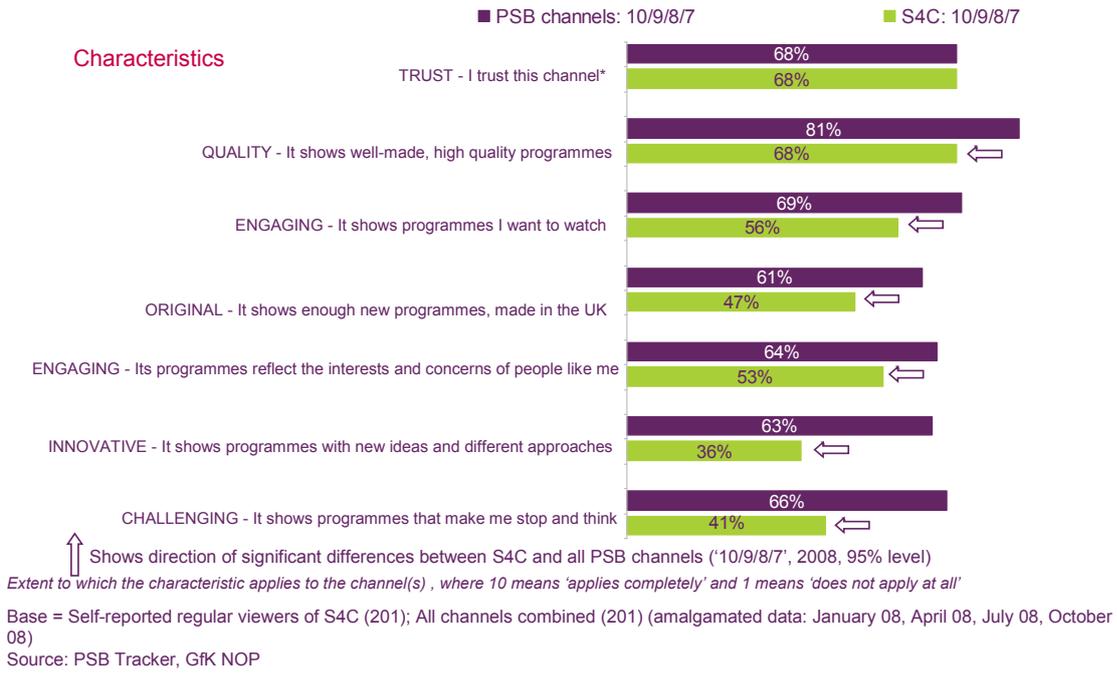


Figure 11.17 illustrates how regular viewers of Welsh programming on S4C rate S4C and the PSB channels together on the PSB characteristics.

Regular viewers of Welsh language programmes on S4C tended to say that *they trusted the channel (68%)*, that they saw the channel as providing *high quality programmes (68%)*, that it *shows programmes they wanted to watch (56%)* and that it *reflected the interests and concerns of people like them (53%)*.

Figure 11.17: Welsh language viewer opinions of delivery of PSB characteristics



Section 12

Nations: Northern Ireland

Introduction

This section looks in more in detail at PSB output, viewing and viewer opinion within Northern Ireland. An overview of PSB is given, but we pay specific attention to areas most pertinent to the devolved nations: provision of nations/regions News and non-News and elements of purpose 1 – *informing our understanding of the world* and purpose 3 – *reflecting cultural identity*.

Summary findings

Output

- In **Northern Ireland**, the BBC increased the amount of nations/regions News and Current Affairs broadcast in 2008 compared with 2004 by 74 hours or 20%, while UTV has decreased their output by 54 hours or 14%.
- In both 2007 and 2008, the BBC broadcast a greater number of hours of these two genres than UTV; this had not been the case in the previous three years.
- In 2008, the BBC's non-network output in Northern Ireland totalled 646 hours (12 hours 23 minutes a week), compared to a total of 496 hours (9 hours 31 minutes a week) on UTV.

Viewing

- In 2008, individuals in Northern Ireland spent the greatest amount of time watching nations/regions News per year (38 hours) and the smallest amount of time watching UK/nations News (75 hours), compared to those in the other devolved nations.
- Analysis of the share of audiences of the nations/regions News slot shows that UTV (36%) continued to gain a higher share than BBC One (28%) in Northern Ireland in 2008.

Audience impact

- In Northern Ireland viewers tended to see the purposes and characteristics as at least as important as did viewers in the UK. Overall, the research statements reflecting purpose 1- *informing our understanding of the world* and the broad cultural elements of purpose 3 are perceived as particularly important by viewers in Northern Ireland. The aspects of the purposes that viewers in Northern Ireland give more importance to are:
 - Purpose 1 - *Nations news: Its nations/regions news programmes provide a wide range of good quality news about my nation/area (84%)*
 - Purpose 2- *Encouraging Interest: As a result of watching its programmes I've become more interested in particular subjects (67%)*
 - Purpose 3 – *non-News Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation (74%)*

- Purpose 3 – *Portrayal: It portrays my region well to the rest of the UK (78%)*
- In general, viewers in Northern Ireland are at least as likely as UK viewers overall to rate the PSB channels highly on each element of the PSB purposes.
- In previous years, ITV1¹¹⁷ and BBC One were rated similarly by their respective regular viewers in terms of their nations News provision, but in 2008 BBC One started to edge ahead of ITV1 on this measure.
- In 2008 in Northern Ireland, more regular viewers of BBC One (57%) rated the provision of non-News for the nation highly than did regular viewers of ITV1 (47%) and BBC Two (36%). There were no significant changes in the ratings given by regular viewers of each channel in Northern Ireland to their nations non-News programming in 2008, compared to 2007.

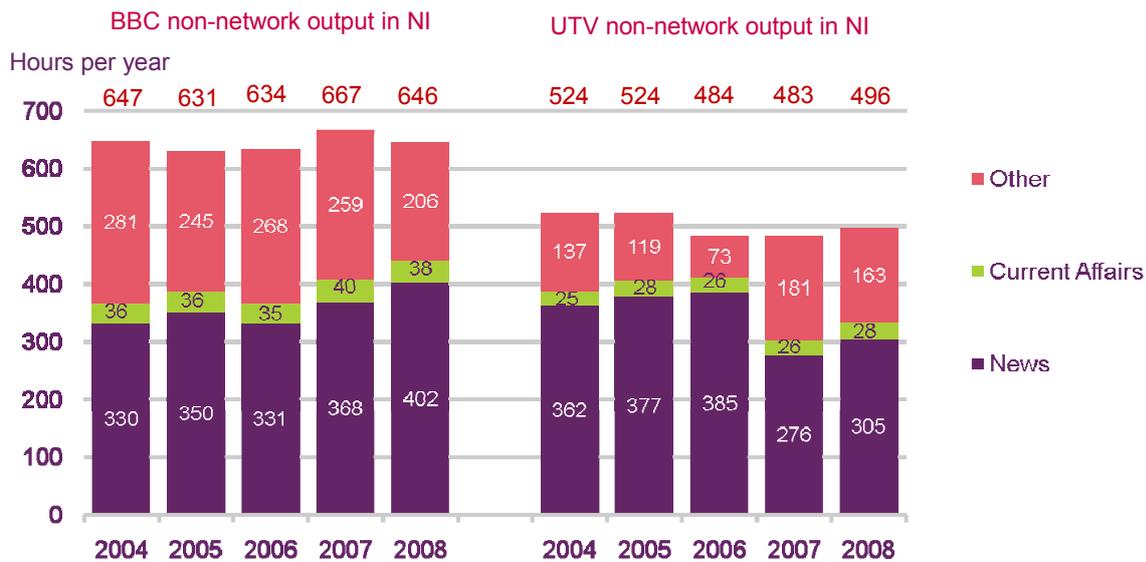
Output

The BBC's nations/regions output, or 'non-network output', in Northern Ireland continued to be provided at similar levels as in previous years, totalling 646 hours in 2008 or 12 hours 23 minutes a week, against a total of 496 hours (9 hours 31 minutes a week) on UTV.

The BBC and UTV both increased their amount of nations/regions News broadcast in 2008 compared with 2007, by 9% and 11% respectively, while the number of hours of nations/regions Current Affairs programmes shown by the two broadcasters remained relatively stable throughout the period under review. Other non-News and Current Affairs programmes fell – by 20% on the BBC and by 10% on UTV.

¹¹⁷ Within the PSB Tracker, Channel 3 is more simply referred to as ITV1 for all respondents in all nations. Note: within Northern Ireland Channel 3 is UTV.

Figure 12.1: Non-network output in Northern Ireland, 2004-2008



Source: Broadcaster returns
 Note: Figures exclude repeats

Viewing

Figure 12.2 sets out the relative proportions of viewing of the different genres on the five main PSB channels across the devolved nations.

There appears to be quite a lot of consistency in patterns of viewing across the different nations, with a few exceptions. Individuals in Northern Ireland appeared to view a slightly higher proportion of nations/regions News than those in any other devolved nation. They also spent a greater proportion of their viewing time watching Other Factual programmes, but less time watching Specialist Factual than viewers in the other devolved nations.

Figure 12.2: Proportion of total network viewing on five main PSB channels, by devolved nation, 2008

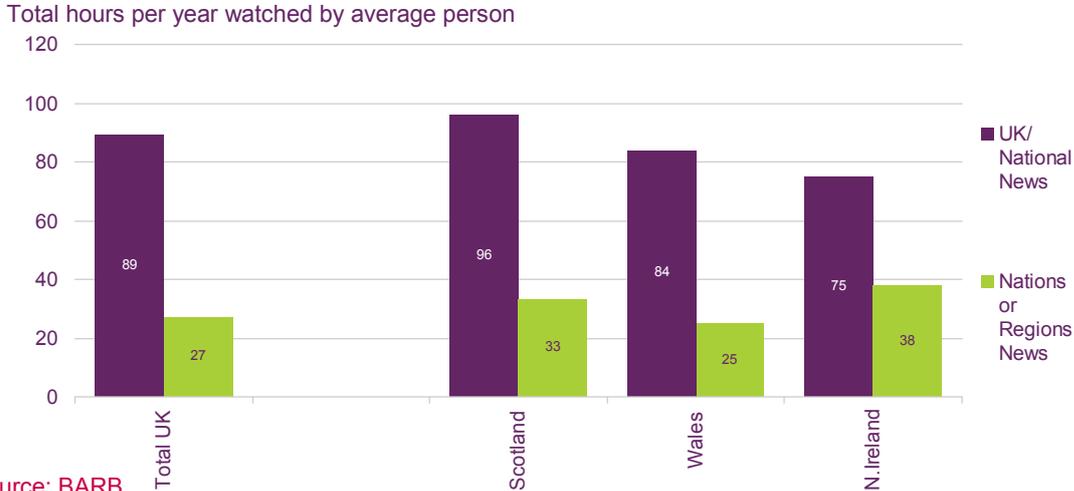


Source: BARB, 2008

Figure 12.3 looks at the average hours per year spent viewing UK/national News compared to nations/regions news by individuals in each nation in 2008. Individuals in Northern Ireland spent the greatest amount of time watching nations/regions News (38 hours) and the

smallest amount of time watching UK/national News (75 hours) than those in the other devolved nations.

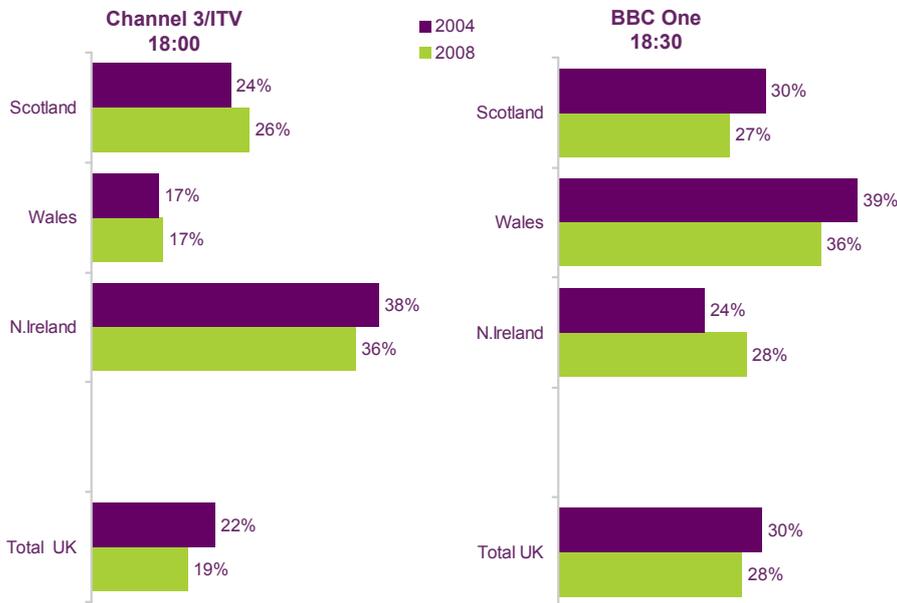
Figure 12.3: Total hours of viewing of nations/regions news versus UK/national News, by nation, 2008



Source: BARB

Figure 12.4 shows the share of all viewing gained by UTV and BBC One evening nations/regions News programmes in 2008, compared to 2004. This shows that share of audiences varies by nation for BBC and Channel 3. Share for UTV (36%) continued to be higher than for BBC One (28%) in Northern Ireland in 2008, although share for BBC One increased in 2008 compared to 2004, by 4%.

Figure 12.4: Channel 3 and BBC One nations/regions News: viewing share 2004-2008



Source: BARB

Note: ITV regions are used for this analysis, and so BBC One share does not correlate exactly with distinct BBC regional news programmes

Audience impact

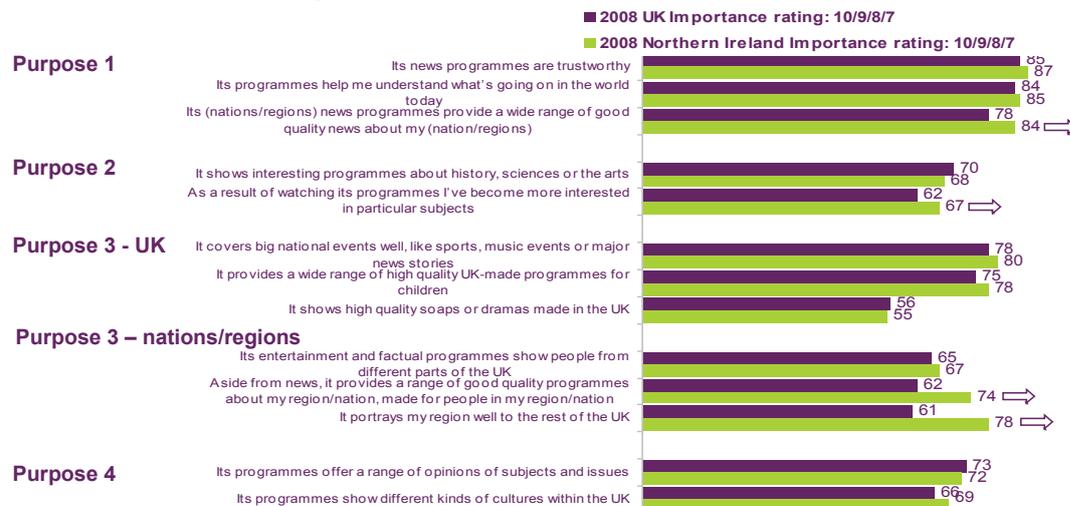
Importance of PSB purposes and characteristics

Figure 12.5 compares viewers' opinions in Northern Ireland to those of viewers in the UK overall on the perceived importance of the PSB purposes in 2008. This shows that in Northern Ireland viewers tended to see the purposes as at least as important as did viewers in the UK. Overall, the research statements reflecting purpose 1- *informing our understanding of the world* and the broad cultural elements of purpose 3 are perceived as particularly important by viewers in Northern Ireland. There are, however, aspects of the purposes that viewers in Northern Ireland give more importance to; these are:

- Purpose 1 - *Nations news: Its nations/regions news programmes provide a wide range of good quality news about my nation/area (84%)*
- Purpose 2- *Encouraging Interest: As a result of watching its programmes I've become more interested in particular subjects (67%)*
- Purpose 3 – *non-News Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation (74%)*
- Purpose 3 – *Portrayal: It portrays my region well to the rest of the UK (78%)*

Figure 12.5: Importance of PSB purposes in Northern Ireland vs. UK, 2008

PSB Purposes: Importance ratings: Northern Ireland vs. UK



↑ Shows direction of significant differences between Northern Ireland and the UK ('10/9/8/7', 2008, 95% level)

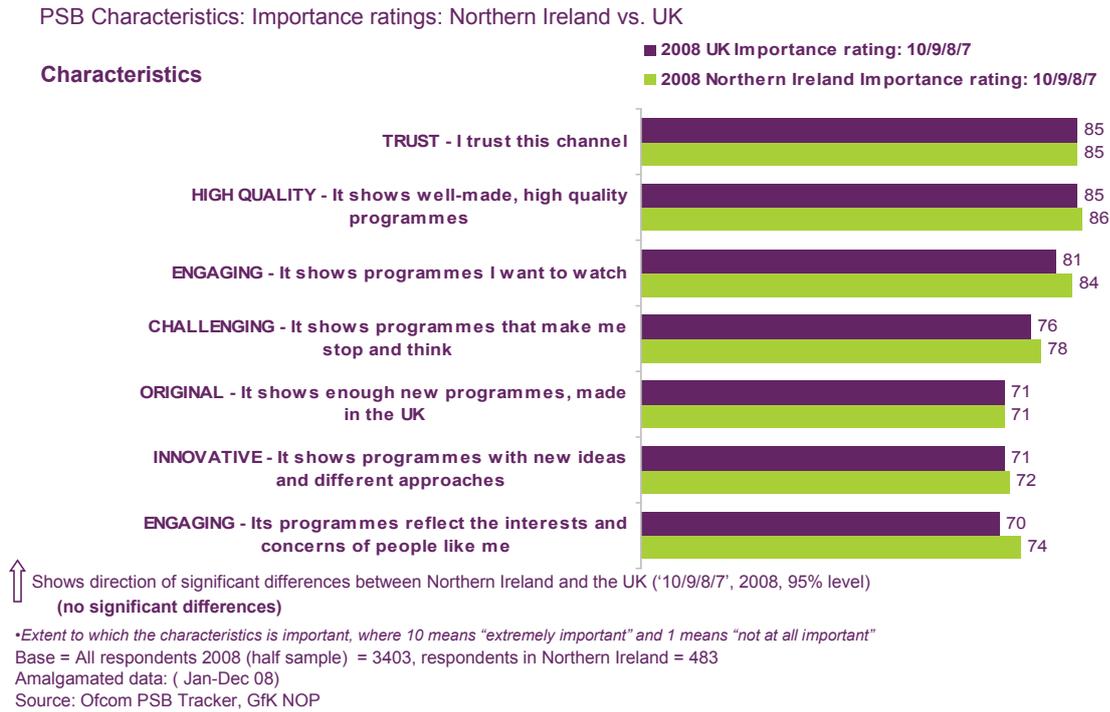
*Extent to which it is important that BBC One, BBC Two, ITV1, Channel 4 (S4C), Five, BBC Three, BBC Four, BBC News and BBC Parliament do this, where 10 means 'extremely important' and 1 means 'not at all important'

Base = All respondents (half sample). 2008 = 3403, respondents in Northern Ireland = 483. Amalgamated data: Jan-Dec 08). NB statement for nations/regions news referred to specific nations after Q3 08. Data for children's statement shown for Jan – July only. Purpose 4 data for Q3-Q4 only

Source: Ofcom PSB Tracker, GfK NOP

Figure 12.6 compares viewers' opinions in Northern Ireland on the perceived importance of the PSB characteristics to those of viewers in the UK overall. This shows that viewers in Northern Ireland in 2008 saw the PSB characteristics at a similar level of importance to viewers in the UK generally.

Figure 12.6: Importance of the PSB characteristics in Northern Ireland vs. UK, 2008



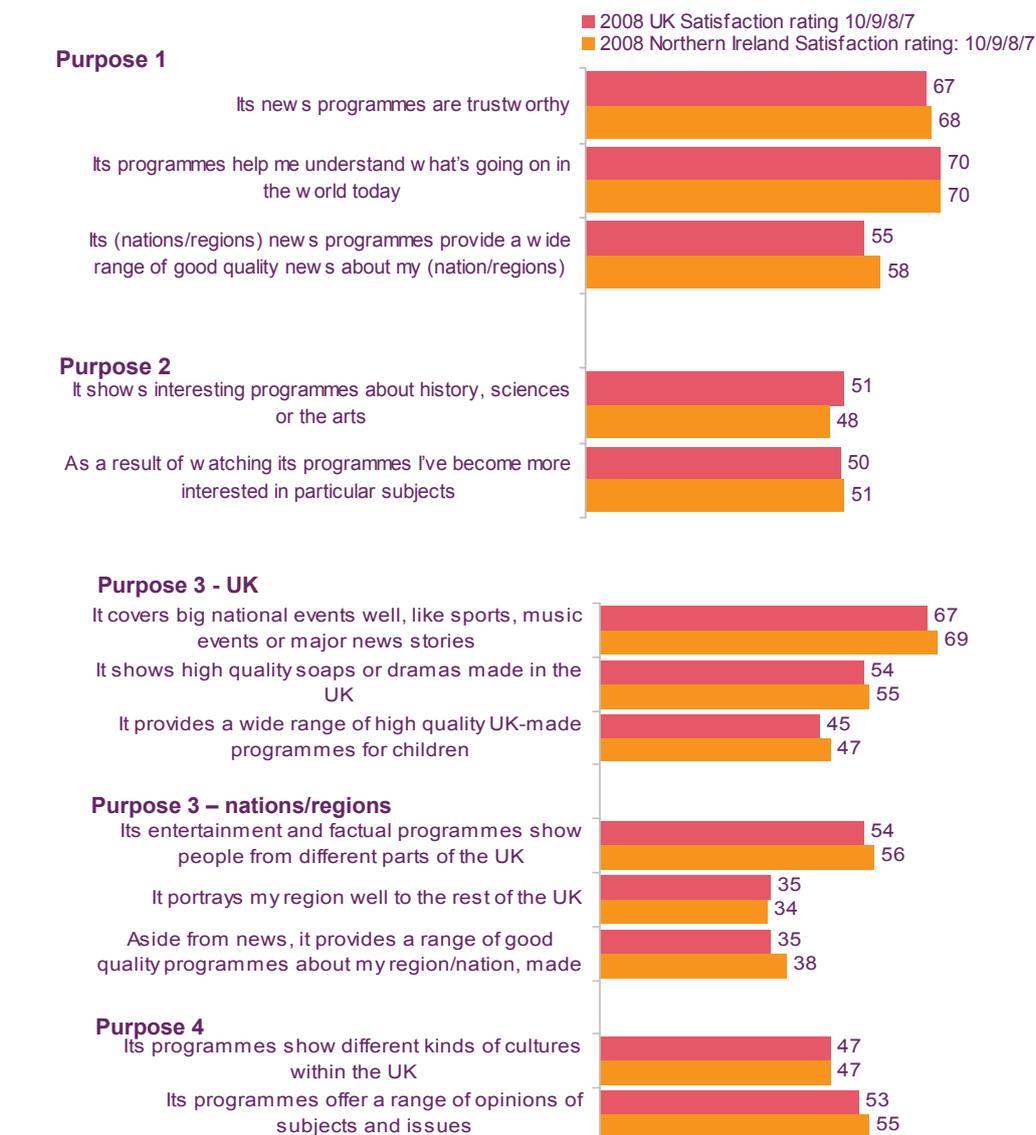
The delivery of PSB purposes and characteristics overall

Figure 12.7 compares the opinions of viewers in Northern Ireland to those of viewers in the UK overall on the delivery of the PSB channels together¹¹⁸ against the PSB purposes. This shows that, in general, viewers in Northern Ireland and viewers in the UK overall rated the PSB channels similarly on each element of the PSB purposes in 2008.

¹¹⁸ In 2008, PSB Channels refers to BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three, BBC Four, BBC News and BBC Parliament. Until April 2007, BBC News was not included in this measure and until July 2008, BBC parliament was not included in this.

Figure 12.7: Delivery of the PSB purposes in Northern Ireland vs. UK, 2008

PSB Purposes: Ratings of main PSB channels: Northern Ireland vs UK



↑ Shows direction of significant differences between Northern Ireland and the UK ('10/9/8/7', 2008, 95% level) (no significant differences)

*Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.

Base = All respondents who ever watch any PSB channels. All Channels Combined, 2008 = 6798, Respondents in Northern Ireland = 976; Amalgamated data: (Jan-Dec 08). Data for P4 statements is from Q3/Q3 2008 only as these were added. Data for children's statement for Q1-Q3 2008

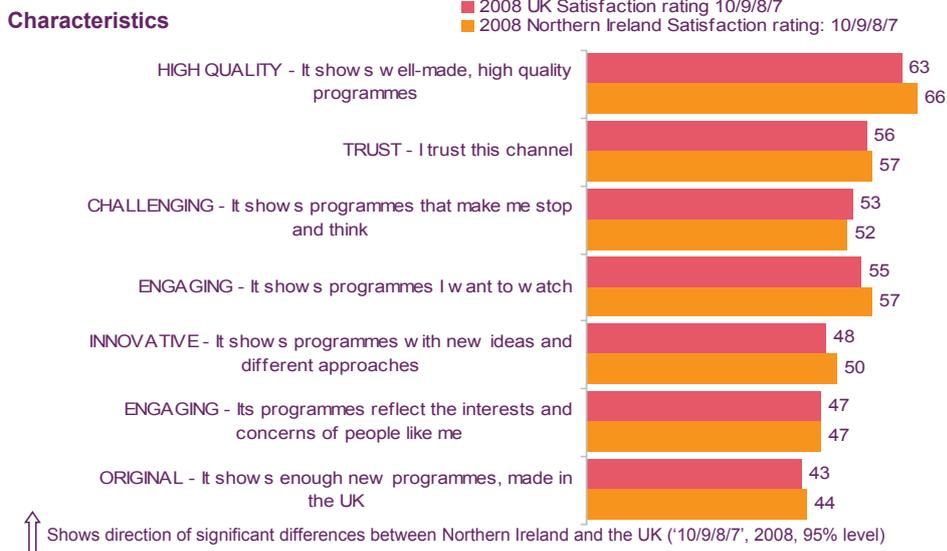
Source: Ofcom PSB Tracker, GfK NOP

Figure 12.8 compares the opinions of viewers in Northern Ireland to those of viewers in the UK overall on the delivery of the PSB channels together¹¹⁹ on the PSB characteristics. Again, this shows that, in general, viewers in Northern Ireland are at least as likely as UK viewers overall to rate the PSB channels highly on each element.

¹¹⁹ In 2008, PSB Channels refers to BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three, BBC Four, BBC News and BBC Parliament. Until April 2007, BBC News was not included in this measure and until July 2008, BBC parliament was not included in this.

Figure 12.8: Delivery of the PSB characteristics in Northern Ireland vs. UK, 2008

PSB Characteristics: Ratings of main PSB channels: Northern Ireland vs UK



*Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.

Base = All respondents who ever watch any PSB channels. All Channels Combined, 2008 = 6798, Respondents in Northern Ireland = 976;

Amalgamated data: (Jan-Dec 08)

Source: Ofcom PSB Tracker, GfK NOP

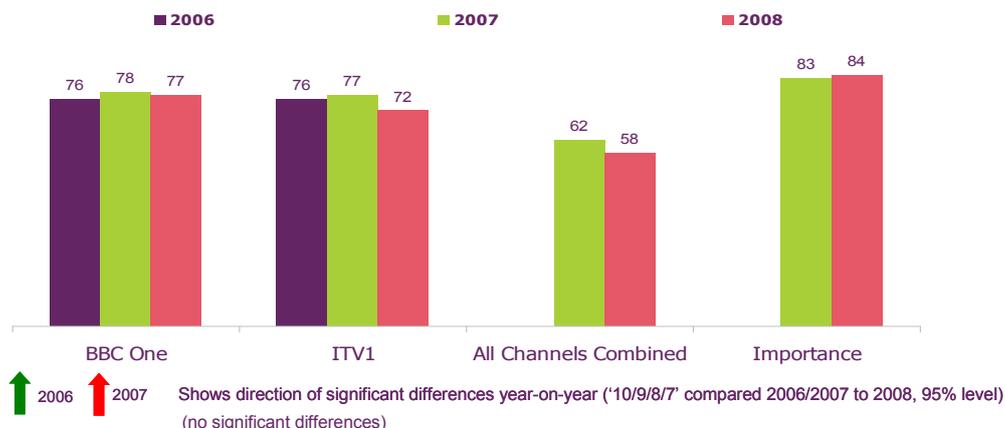
The delivery of purpose 1 and purpose 3 by individual channels

The opinions of viewers in Northern Ireland on the delivery of nations News are shown in Figure 12.9. In previous years ITV1¹²⁰ and BBC One were rated similarly by their respective regular viewers, but in 2008 BBC One started to edge ahead of ITV1 on this measure. Over half (58%) rated the channels together as delivering this element of purpose 1 well in 2008.

¹²⁰ Within the PSB Tracker, Channel 3 is more simply referred to as ITV1 for all respondents in all nations. Note: within Northern Ireland Channel 3 is UTV.

Figure 12.9: Opinions on purpose 1 : nations News programmes in Northern Ireland

Its news programmes for people in Northern Ireland provide a wide range of good quality news about Northern Ireland
 Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

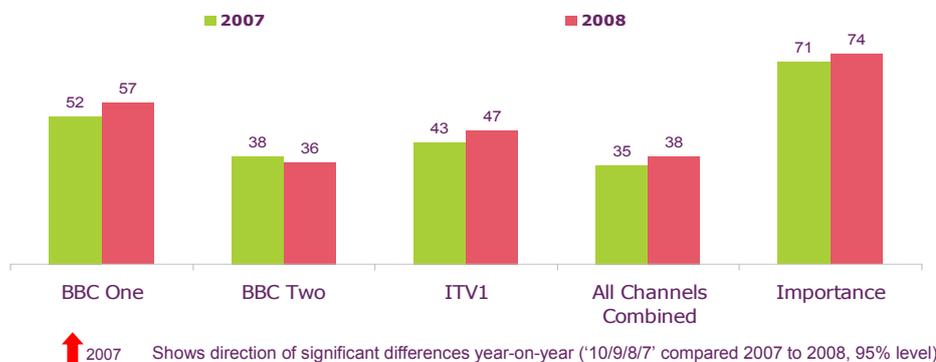


Base for 'all channels combined' = all respondents in Northern Ireland who ever watch any PSB channels : 1015, 976
 Base for importance: 748, 483 (Half sample for Q1 and Q4 2007 and half sample for all of 2008)
 Base for individual channels: Self-reported regular viewers of each channel in Northern Ireland BBC1 = 703, 683, 663 ITV1 = 647, 583, 542
 NB Before July 08 this statement was asked to all as 'Its regional news programmes provide a wide range of good quality news about my area' but was changed for greater clarity for those in the devolved nations. Source: Ofcom PSB Tracker, GfK NOP

In 2008 in Northern Ireland, more regular viewers of BBC One (57%) rated the provision of non-News for the nation highly than did regular viewers of ITV1 (47%) and BBC Two (36%). There were no significant changes in the ratings given by regular viewers of each channel in Northern Ireland on their nations non-News programming in 2008, compared to in 2007.

Figure 10.9: Opinions on purpose 3 : nations non-News programmes in Northern Ireland

Aside from news, it provides a range of good quality programmes about my region, made for people in my region
 Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base for 'all channels combined': All respondents in Northern Ireland who ever watch any PSB channels = 505, 976,
 Base size for importance: 376, 483 (half sample for Q4 of 2007 and half sample for all of 2008)
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jul, Oct 07, Jan, Apr, Jul, Oct 08) BBC1 = 324, 663 BBC2 = 116, 283 ITV1 = 280, 542 (statement added in Q307)
 Source: Ofcom PSB Tracker, GfK NOP

Section 13

Nations: England and the English regions

Introduction

This section looks in more in detail at PSB output, viewing and viewer opinion in England, and specifically within regions in England. An overview of PSB generally is given, but specific attention is paid to areas most pertinent to the nations and regions, that is: provision of nations/regions News and non-News and elements of purpose 1 – *informing our understanding of the world* and purpose 3 – *reflecting cultural identity*.

Summary findings

Output

- There has been a steady growth in the volume of regional programmes shown in the BBC's English regions over the past five years, resulting in a total of 4,147 hours broadcast in 2008, most of which were News programmes.
- On ITV1, there were decreases in total regional output between 2005 and 2007 and a small increase in 2008 to 3,807 hours a year. The volume of regional programmes, other than News and Current Affairs, fell over the last four years on ITV1, as a result of the standardisation of quotas across most of the English regions and agreed reductions in the quota levels. There was an under-delivery in the amount of regional News broadcast in 2007, as a result of cutbacks in regional news bulletins. Full compliance with the 5½ hour weekly quota level was again achieved in each region in 2008.

Viewing

- In terms of the average hours of News programming watched in 2008, individuals in South West and Meridian viewed above average hours of UK/national News programming. Individuals in the South West watched the greatest amount of nations/regions News. Individuals in London consumed the smallest amount of both nations/regions News and UK/national news. Note: the demographic profile within each region is likely to influence the consumption figures.
- The audience share of evening nations/regions News programmes in 2008 varies by region, with ITV lowest in London. BBC nations/regions News gained a lower share in North East and Border.
- Looking at the change in audience share figures of evening nations/regions News from 2004 to 2008 reveals that the share of ITV nations/regions News has fallen or remained static in all English regions. BBC nations/regions news share increased in Meridian, but declined in every other region.

Audience impact

- Across a number of regions, BBC One tended to be rated higher than ITV1 by its regular viewers on its delivery of regional News; these included Yorkshire and Humberside (75% vs. 59%), East Midlands (66% vs. 54%), West Midlands (67% vs. 57%) and Greater London (63% vs. 52%).

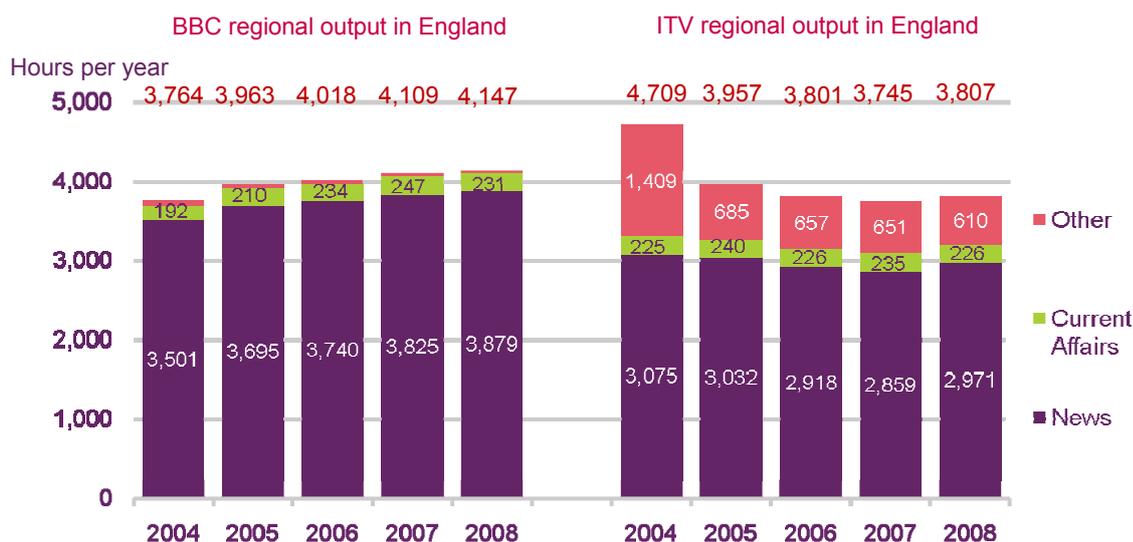
- Across all regions, BBC Two was rated less highly than BBC One and ITV1 on its delivery of regional programming other than News. In Greater London a higher proportion of BBC One regular viewers than ITV1 regular viewers rated the channels highly in this area.

Output

Figure 13.1 shows steady growth in the volume of regional programmes in the BBC's English regions, from 3,764 hours in 2004 to 4,147 hours in 2008, an increase of 10%, most of which were News programmes.

On ITV1, there were falls in total regional output between 2004 and 2007, amounting to 20%, and a small increase in 2008 to 3,807 hours. Regional programmes, other than the News and Current Affairs genres, have fallen over the last four years on ITV1, as a result of the standardisation of quotas across most of the English regions and agreed reductions in the quota levels. There was an under-delivery in the amount of regional News broadcast in 2007, as a result of cutbacks in regional News bulletins. After Ofcom's involvement, there was an increase in the level of News broadcast in 2008 compared to 2007, and full compliance with the 5½ hour weekly quota level was achieved in each region.

Figure 13.2: Non-network output in England, 2004-2008



Source: Broadcaster returns
 Figures exclude repeats.

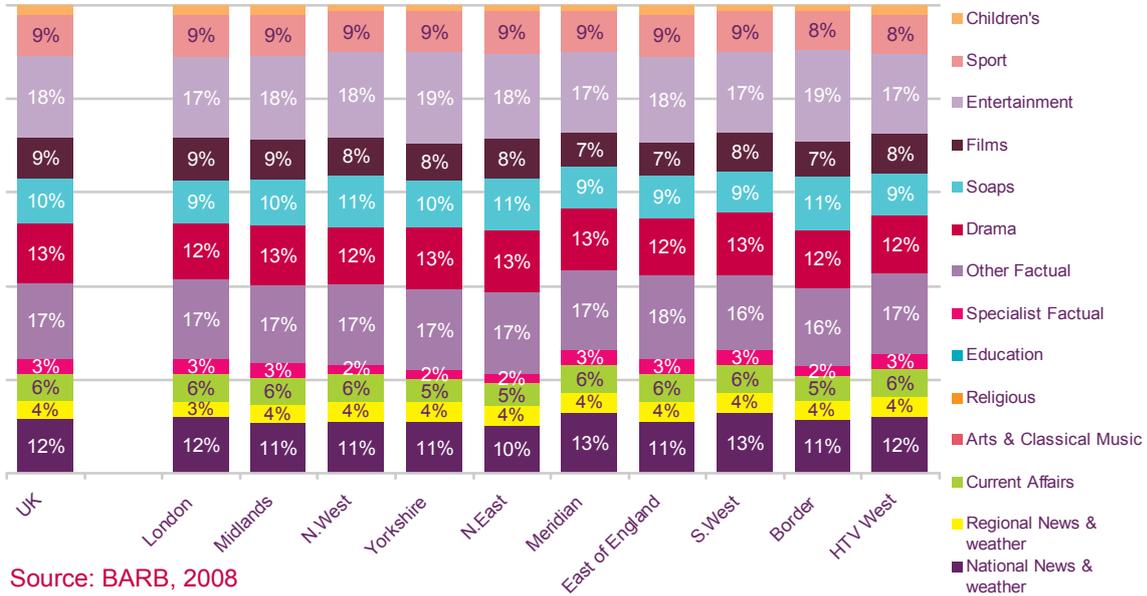
Viewing

Figure 13.3 sets out the relative proportions of viewing of the different genres on the five main PSB channels across the regions in England.

There is quite a lot of consistency in patterns of viewing, with a few differences. Looking at UK/national News it appears that individuals in Meridian and South West viewed a slightly higher proportion of this genre compared to people in the other English regions in 2008. Individuals in Yorkshire and Border spent a slightly higher proportion of their viewing time on Entertainment programming. Those in the East of England viewed a higher proportion of Other Factual programming.

Figure 13.3: Proportion of viewing on the five main PSB channels, by English region, 2008

Proportion of viewing (%)

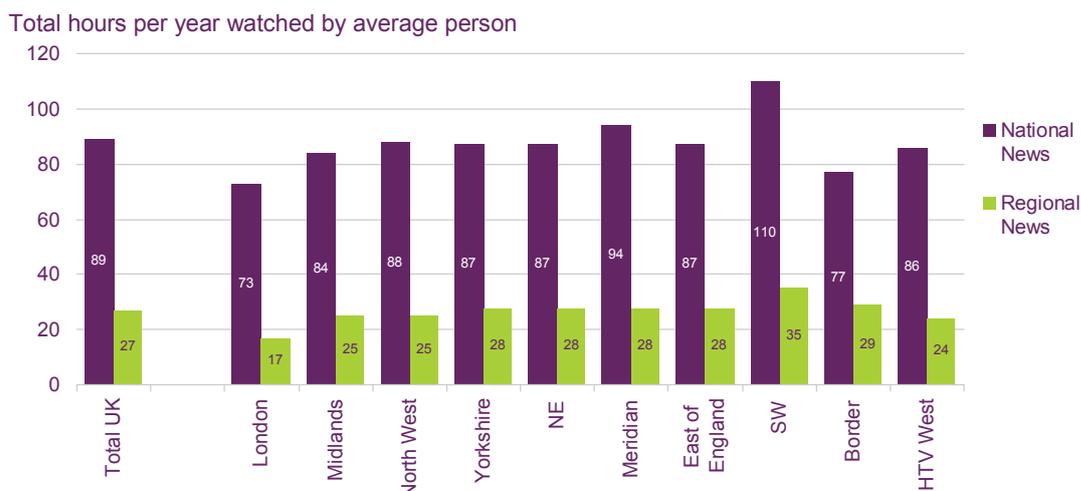


Source: BARB, 2008

Figure 13.4 looks at the average hours in a year spent viewing UK/national news compared to nations/regions News by English region in 2008. Individuals in South West and Meridian viewed above average hours of UK/national News programming, while those in the South West watched the greatest amount of nations/regions. Viewers in London consumed the smallest amount of both nations/regions News and UK/national news.

Note: the demographic profile of London is substantially younger than some of the other regions and has a higher proportion of minority ethnic groups; both of these groups consume less television News. Therefore it is likely that the demographics of these regions are influencing the consumption figures.

Figure 13.4: Total hours of viewing of nations/regions news versus UK/national News, by English region, 2008

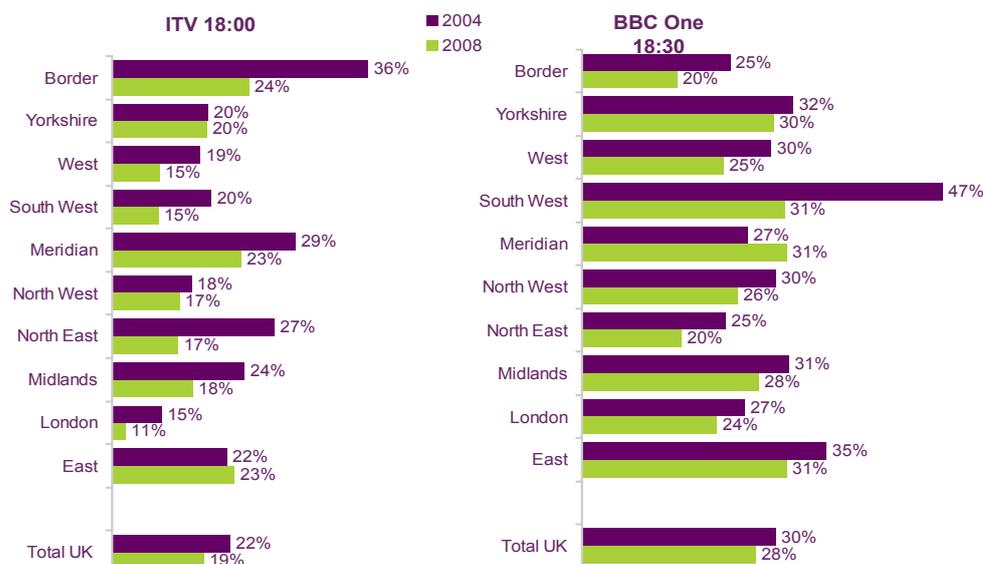


Source: BARB

Figure 13.5 shows the share of all viewing gained by ITV1 and BBC One evening nations/regions News programmes in 2008, compared to 2004. This shows that share of audiences varies by region, with ITV lowest in London. BBC nations/regions News gained a lower share in North East and Border.

Share of ITV nations/regions News has fallen or remained static in all of the English regions from 2004 to 2008. Looking at BBC nations/regions News reveals that share has increased in Meridian, but declined in every other region.

Figure 13.5: ITV1 and BBC One regions/nations News: viewing share, 2004-2008



Source: BARB

Note: ITV regions are used for this analysis, and so BBC One share does not correlate exactly with distinct BBC regional news programmes

Audience impact

Delivery of nations and regions purposes within regions¹²¹

This section focuses on the opinions of viewers in the English regions, looking on the extent to which different channels deliver on:

- Purpose 1 - *Its regional News programmes provide a wide range of good quality news about my area*
- Purpose 3- *Aside from news, it provides a range of good-quality programmes about my region, made for people in my region.*

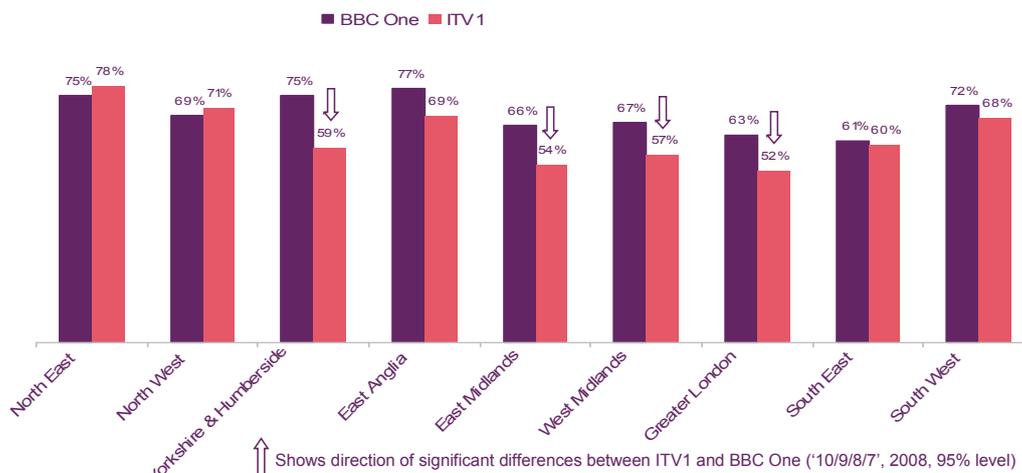
Figure 13.6 sets out the proportion of regular viewers of BBC One and ITV1 in England who rated the channels positively on the delivery of regional News in 2008. This shows that across a number of regions BBC One Regional News tended to be rated higher than ITV1 regional News by its regular viewers; these included Yorkshire and Humberside (75% vs. 59%), East Midlands (66% vs. 54%), West Midlands (67% vs. 57%) and Greater London (63% vs. 52%).

¹²¹ Regions within the PSB Tracker are based on the government standard regions (GSR).

Figure 13.6: Delivery of nations/regions News in English regions, 2008

Its regional news programmes provide a wide range of good quality news about my area

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Base = Self-reported regular viewers of each channel within the English regions: North East:164, 136; North West: 371,295; Yorkshire and Humberside: 276,221; East Anglia: 140, 88*; East Midlands:224,172; West Midlands:290,210; Greater London: 378,233; South East:613, 384; South West:303,202. Amalgamated data (Jan 08, April 08, July 08, Oct 08). NB In devolved nations, the nation/nations news was asked about, where as in England the respondents region/regional news was asked about after Q308.

Source: Ofcom PSB Tracker, GfK NOP

(*base size under 50, ** base size under 100)

The figure below shows regular viewers' opinions of the delivery of regional News by BBC One and ITV1 in 2007 and 2008 in English regions. This identifies that in the West Midlands, the ratings given by regular viewers of ITV1 have declined in 2008. There were no other significant differences in opinions within regions between 2007 and 2008.

Figure 13.7: Delivery of nations/regions News in English regions, 2007 and 2008

Its regional news programmes provide a wide range of good quality news about my area

	North East		North West		Yorks. and Humber		East Anglia		East Midlands	
	BBC One	ITV1	BBC One	ITV1	BBC One	ITV1	BBC One	ITV1	BBC One	ITV1
2007	70%	72%	70%	65%	76%	66%	74%	69%	65%	62%
2008	75%	78%	69%	71%	75%	59%	77%	69%	66%	54%
Sig diff?	No	No	No	No	No	No	No	No	No	No

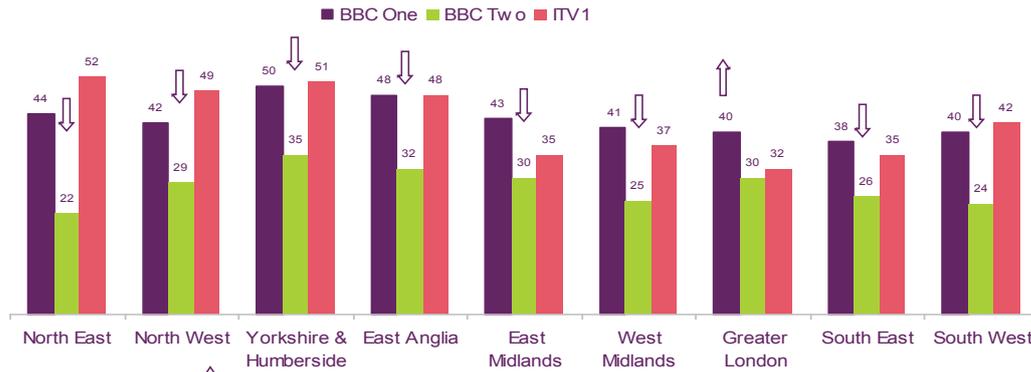
	West Midlands		Greater London		South East		South West	
	BBC One	ITV1	BBC One	ITV1	BBC One	ITV1	BBC One	ITV1
2007	70%	68%	59%	54%	59%	54%	72%	59%
2008	67%	57%	63%	52%	61%	60%	72%	68%
Sig diff?	No	Yes	No	No	No	No	No	No

Base = Those claiming to be regular viewers of each channel in the English Regions
 BBC One (2007: 166, 355, 283, 151, 230, 294, 410, 651, 273; 2008: 164, 371, 276, 140, 224, 290, 378, 613, 303)
 ITV1 (2007: 146, 280, 209, 109, 178, 218, 269, 452, 178; 2008: 136, 295, 221, 88*, 172, 210, 233, 384, 202)
 Source: Ofcom PSB Tracker, GfK NOP. Weighted %
 (*base size under 50, ** base size under 100)

Figure 13.8 shows the proportion of regular viewers of BBC One, BBC Two and ITV1 in England in 2008 who rated the channels positively on the delivery of regional content other than News. This identifies that across all regions, BBC Two was rated less highly in this area than BBC One and ITV1. In Greater London a higher proportion of BBC One regular viewers rated the channel highly on this measure, than did regular viewers of ITV1. In all other regions there were no significant differences between BBC One and ITV1.

Figure 13.8: Delivery of nations non-News in English regions, 2008

Aside from news, it provides a range of good quality programmes about my region, made for people in my region
 Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel



Shows when one channel is significantly different to two others ('10/9/8/7', 2008, 95% level)
 Base = Self-reported regular viewers of each channel: North East: 164, 75*, 136; North West: 371, 162, 295; Yorkshire and Humberside: 276, 133, 221; East Anglia: 140, 76*, 88*; East Midlands: 224, 106, 172; West Midlands: 290, 145, 210; Greater London: 378, 186, 233; South East: 613, 316, 384; South West: 303, 172, 202. Amalgamated data (Jan 08, April 08, July 08, Oct 08)
 Source: Ofcom PSB Tracker, GfK NOP
 (*base size under 50, ** base size under 100)

The figure below shows regular viewers' opinions of the delivery of non-News regional output by BBC One, BBC Two and ITV in 2007 and 2008 in the English regions. This identifies that there were no significant differences in opinions between 2007 and 2008.

Figure 13.9: Delivery of nations/regions non- News in English regions, 2007 and 2008

Aside from news, it provides a range of good quality programmes about my region, made for people in my region

	North East			North West			Yorks. and Humber			East Anglia			East Midlands		
	BBC One	BBC Two	ITV1	BBC One	BBC Two	ITV1	BBC One	BBC Two	ITV1	BBC One	BBC Two	ITV1	BBC One	BBC Two	ITV1
2007	37%	-	42%	45%	25%	51%	52%	29%	48%	39%	-	-	39%	28%	41%
2008	44%	22%	52%	42%	29%	49%	50%	35%	51%	48%	32%	48%	43%	30%	35%
Sig diff?	No	-	No	No	No	No	No	No	No	No	-	-	No	No	No

	West Midlands			Greater London			South East			South West		
	BBC One	BBC Two	ITV1	BBC One	BBC Two	ITV1	BBC One	BBC Two	ITV1	BBC One	BBC Two	ITV1
2007	36%	29%	33%	35%	27%	30%	35%	25%	38%	47%	32%	36%
2008	41%	25%	37%	40%	30%	32%	38%	26%	35%	40%	24%	42%
Sig diff?	No	No	No	No	No	No	No	No	No	No	No	No

Base = Those claiming to be regular viewers of each channel in the English Regions

BBC One (2007: 80*, 167, 136, 69*, 115, 133, 194, 319, 128; 2008: 164, 371, 276, 140, 224, 290, 378, 613, 303)

BBC Two (2007: 39**, 85*, 68*, 33**, 51*, 66*, 87*, 152, 66*; 2008: 75*, 162, 133, 76*, 106, 145, 186, 316, 172)

ITV1 (2007: 72*, 127, 97, 47**, 85*, 98, 130, 214, 79*; 2008: 136, 295, 221, 88*, 172, 210, 233, 384, 202)

Source: Ofcom PSB Tracker, Gfk NOP. Weighted %. * Small base size (under 100) **Where a base size is under 50, data is not shown

Section 14

Public service text services

Introduction

This section focuses on the public service text services, in particular providing an indication of the PSB requirements of Teletext and the public's use of, and views on, the service on ITV and Channel 4

Summary findings

- The decline in the average weekly reach of text services since 2004 for each of the five main PSB channels stabilised in 2008. BARB figures indicate that average weekly reach for services on the individual channels in 2008 stood at BBC One: 2.5m, BBC Two: 1.1m, ITV1: 1.7m, Channel 4: 0.8m and Five: 0.3m.
- The weekly reach of text services was higher through the analogue signal than via the digital television signal.
- In July 2008, just under a third (32%) of people claimed to ever use analogue Teletext, while 27% claimed to ever use the digital Teletext services. Ten per cent claimed to use each of these services 'regularly'.
- The most popular types of pages accessed by Teletext users in 2008 were Weather, regional News and national News.
- The types of information users accessed on the digital and analogue services were very similar; the most notable difference was that digital Teletext users were more likely than analogue users to say they accessed 'other' types of information about their region (that is, not regional News)
- Opinions on both the breadth of information and the impartiality of Teletext were generally positive, with over 8 in 10 users of both the digital and the analogue services agreeing that there is a *range of information available*, and that the information is *accurate and impartial*.

Background

The BBC operates analogue (Ceefax) and digital TV (BBCi) text services under service licences issued by the BBC Trust.

The public Teletext service is a designated public service broadcaster, as set out in the 2003 Communications Act. The licensee, Teletext Ltd, provides text pages behind the analogue broadcasts of ITV1, Channel 4 and the digital channel 100. The licensee also operates other digital services, such as Teletext Holidays and the services behind the digital broadcasts ITV1 and Channel 4, outside of the scope of the licence.

The Communications Act 2003 outlines the PSB remit of the public Teletext licensee as:

- contributing to the PSB objectives generally (s264) along with the other public service broadcasters;

- providing a range of high quality and diverse text material (s265); and
- completing a similar statement of programme policy (SOPP) process to the other commercial licensees, involving preparing a statement of service policy and monitoring performance in carrying out the proposals.

The public Teletext licence specifies a certain amount of pages of text on genres which relate to the PSB remit and the PSB purposes and characteristics. These requirements were revised in January 2009 following Ofcom’s second PSB Review¹²². Simplified, these requirements relate to regional News and non-News provision, and to the provision of national News:

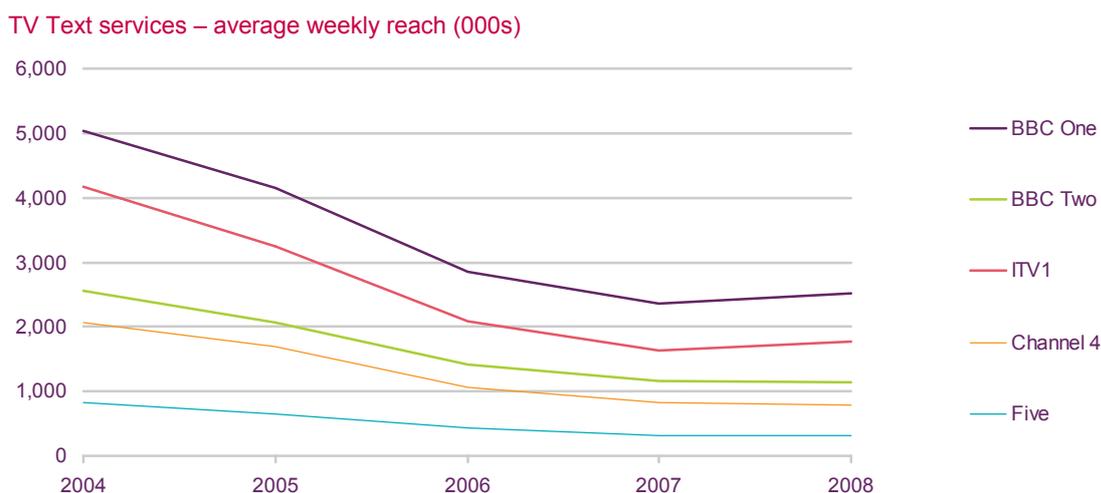
- not less than 20 main pages of UK/national News on both the analogue and digital service;
- not less than 12 main pages of regional News on both the analogue and digital service; and
- not less than 24 main pages of regional non-News pages on both the analogue service and digital service.

On July 16 2009, the Daily Mail & General Trust plc announced that it plans to end the transmission of the analogue Teletext services in January 2010. At the same time, it will also halt a number of its digital television services.

Viewing figures

The number of people who use text services for at least three consecutive minutes in a week has declined considerably over time (particularly between 2004 and 2006). However, across all channels it appears that the figures for 2008 have appeared to stabilise to some degree compared to 2007. Average weekly reach for services on the individual channels in 2008 stood at BBC One: 2.5m, BBC Two: 1.1m, ITV1: 1.7m, Channel 4: 0.8m and Five: 0.3m.

Figure 14.1: Weekly reach of text services



Source: BARB

Viewing to text services amongst all individuals, (reach based on 3mins consecutive)

¹²² Ofcom’s *Second Public Service Broadcasting Review: the Digital Opportunity*, April 2008.

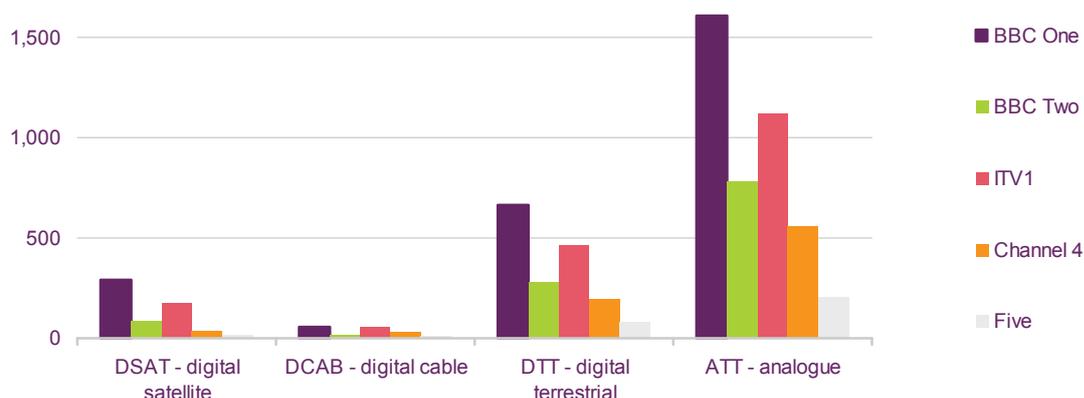
Figure 14.2 looks at the use of text services in 2008 by channel by television platform. Note: this analysis looks at use of the text services through a particular platform, regardless of what other platforms they may have access to within the household.

The reach of text services via the analogue terrestrial signal was highest with approx 2.5 million individuals using the services for at least three minutes consecutively in a week. The reach of the service on BBC One led with just over 1.6 million individuals accessing the service for three or more minutes in an average week.

On the digital platforms, use of text services had the highest reach through digital terrestrial (Freeview). Individuals' use of text services through the digital cable signal was low compared to reach via the digital terrestrial platform (Freeview) and the digital satellite platform. Again, reach of the text service on BBC One led, both on digital satellite and on digital terrestrial signals.

Figure 14.2: Weekly reach of text services by platform, 2008

TV Text services – average weekly reach (000s)



Source: BARB

Viewing to text services through different platform signals (reach based on 3mins consecutive)

Audience impact

The Ofcom PSB Tracker includes questions about claimed use of, and opinions about, Teletext on ITV and Channel 4, and the findings are shown in figures 4.3 to 4.5. Previously Teletext was asked about generally, but in July 2008 the questions were designed to gather audience views on the analogue and digital services separately¹²³.

In July 2008, just under a third (32%) of people claimed to ever use analogue Teletext, while 27% claimed to ever use the digital Teletext services. Ten per cent claimed to use each of these services 'regularly'. Claimed use in the PSB Tracker appears higher than the BARB

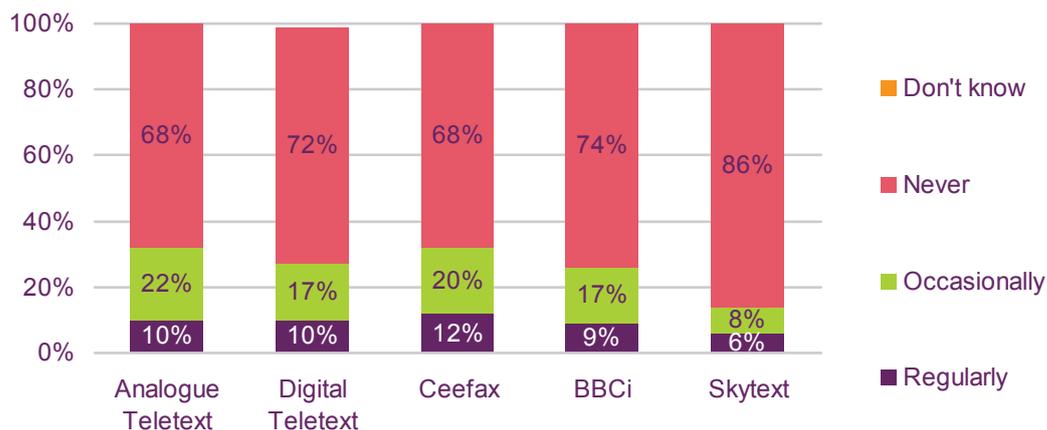
¹²³ Respondents were given descriptions of analogue and digital Teletext: 'Analogue Teletext is the original text service behind only ITV1 and Channel 4, and contains text information only. This is controlled by entering page numbers or the coloured buttons on your TV remote control. Digital Teletext is the newer style service that is available through digital TV on ITV's and Channel 4's channels or channel 100. This also contains pictures and sometimes video content in addition to the text on each page. It can be controlled through on-screen menus as well as buttons on the remote control'.

measurement of use. Respondents may be overestimating their use of Teletext and Ceefax; potentially due to confusion between services, or simply due to an overestimation of the frequency with which they access the services.

Given changes in methodology and question wording since 2007, caution should be used when directly comparing results. However, in 2007 the research found that just over a third of people (36%) said they used Teletext on ITV or Channel 4. In 2008, 43% claimed to use either analogue or digital Teletext.

Figure 14.3: Claimed use of Teletext and other text services

Claimed regularity of using text services

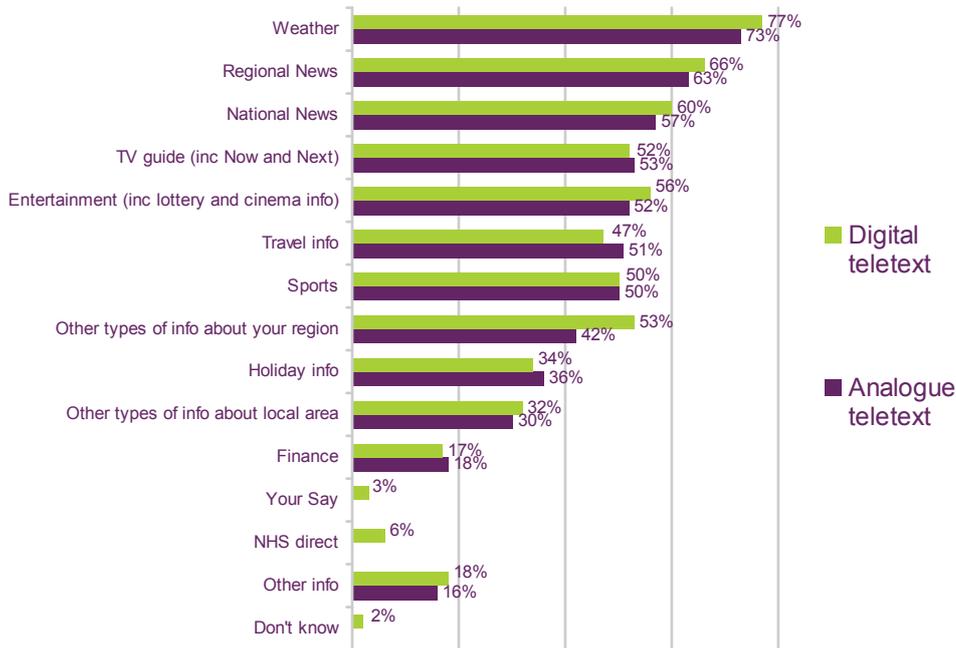


Base: All adults (1743) Jul 2008
Source: Ofcom PSB Tracker, Gfk NOP

Figure 14.4 shows the types of information Teletext users said they read on the text services. The most popular types of pages accessed by Teletext users in 2008 were Weather, Regional News and National News. The types of information accessed by users on the digital and analogue services were very similar; the most notable difference was that digital Teletext users were more likely to say they accessed 'other' types of information about their region (that is, not regional News) than were analogue users (53% vs. 42%).

Figure 14.4: Claimed types of information accessed on Teletext

Which, if any, of the following types of information do you read on Teletext?



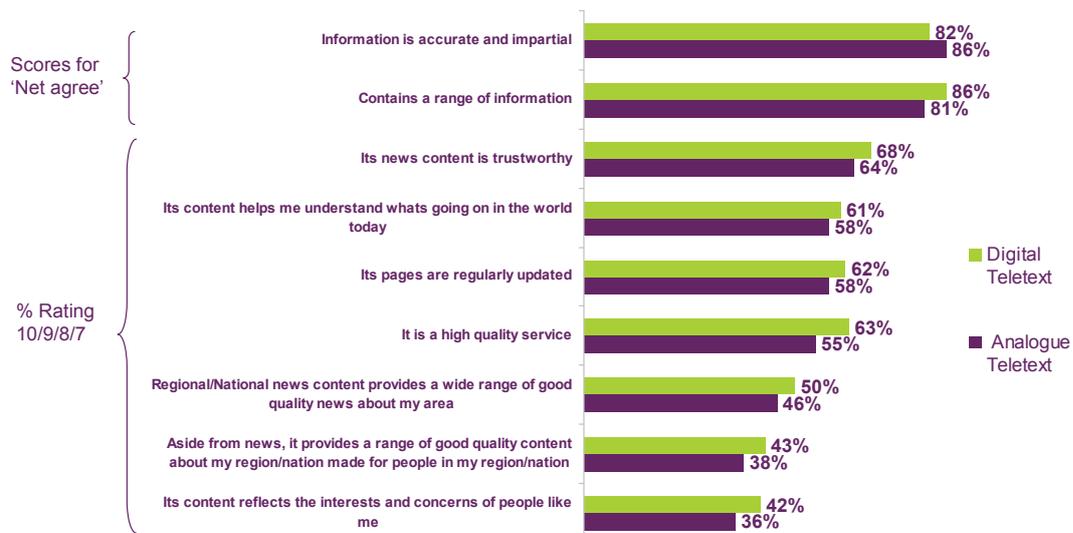
Base: Those accessing digital or analogue Teletext (355, 402) (if both used, respondent asked about service used most often) Jul 2008
 Source: Ofcom PSB Tracker, GfK NOP

Figure 14.5 provides information on how Teletext users see the service in terms of breadth of information, the impartiality of the information and relevant elements of the purposes and characteristics. Again, they were asked their opinions about the digital and analogue text services separately, although the data indicate that there were no major differences between their opinions on the analogue and digital services.

Opinions on both the breadth of information and the impartiality of Teletext were positive, with over 8 in 10 users of both the digital and the analogue services agreeing that there is a *range of information available*, and that the information is *accurate and impartial*.

Over half of both analogue and digital Teletext users rated the service highly on having news content that is *trustworthy*, being a service that *helps them understand what is going on with the world, having well-made high quality content* and that its *pages are regularly updated*.

Figure 14.5: Opinions of Teletext service, 2008



Base: Those accessing digital or analogue Teletext (355, 402) (if both used, respondent asked about service used most often) Jul 2008
 Source: Ofcom PSB Tracker, GfK NOP

Section 15

Additional programming genres

Introduction

This section looks at the genres of Drama and Soaps, Sports and Comedy. These genres may contribute to the delivery of a number of the PSB purposes and characteristics, particularly purpose 3.

Summary findings

Output

- The volume of Soaps in peak-time has remained relatively steady over the last three years on the main PSB channels. However, the amount of other originated first-run Drama in peak has decreased to 650 hours from a high of 731 hours in 2005 (11% fall). The main reason for this fall is the reduction, by 23%, in ITV1's output since 2005.
- Volume of first-run UK originated Comedy and total Comedy on the main PSB channels decreased slightly in 2008 from 2007, but was still at a higher level than in 2006. ITV1 broadcast more first-run originated comedy programmes in 2008 (70 hours) than any other channel.
- The volume of Sport rises and falls in direct relationship to the sporting calendar and the amount of televised Sport shown by each broadcaster is also largely affected by the sports rights won and lost.
- BBC One and Channel 4 each broadcast just over 800 hours of Sport in 2008, with BBC Two offering more - at 976 hours (or 18 ³/₄ hours a week). Of the five main PSB channels, Five proved to be the channel showing most Sport- peaking at 1,600 hours in 2006 but reducing to 1,203 hours (23 hours a week) by 2008.

Viewing

- Average viewing hours per year per individual of UK Soaps and UK Drama on the five main PSB channels has decreased since 2004:
 - UK Soaps have declined by 19 hours or 22% since 2004. The average hours per year watched in 2008 was 69 hours.
 - UK Drama has decreased by three hours or 4% since 2004. On average, 74 hours per year were watched in 2008.
- Alongside the greater availability of Sports on the main PSB channels in 2008 compared to 2007, average hours watched per year per individual of Sports on the five main PSB channels increased from 2007 to 2008 (by 9 hours or 15%), to 70 hours on average in 2008.

- Average hours per year per individual of UK Comedy watched on the five main PSB channels remained was 8 hours per year per average individual, compared to 9 hours in 2006 and 14 hours in 2004.

Background

This section includes information on output hours and audience viewing figures for the genres listed below:

- Drama and Soaps
- Sport
- Comedy

Output hours

UK Drama and Soaps

Figure 15.1 shows the picture for Drama and Soaps in the peak-time schedules.

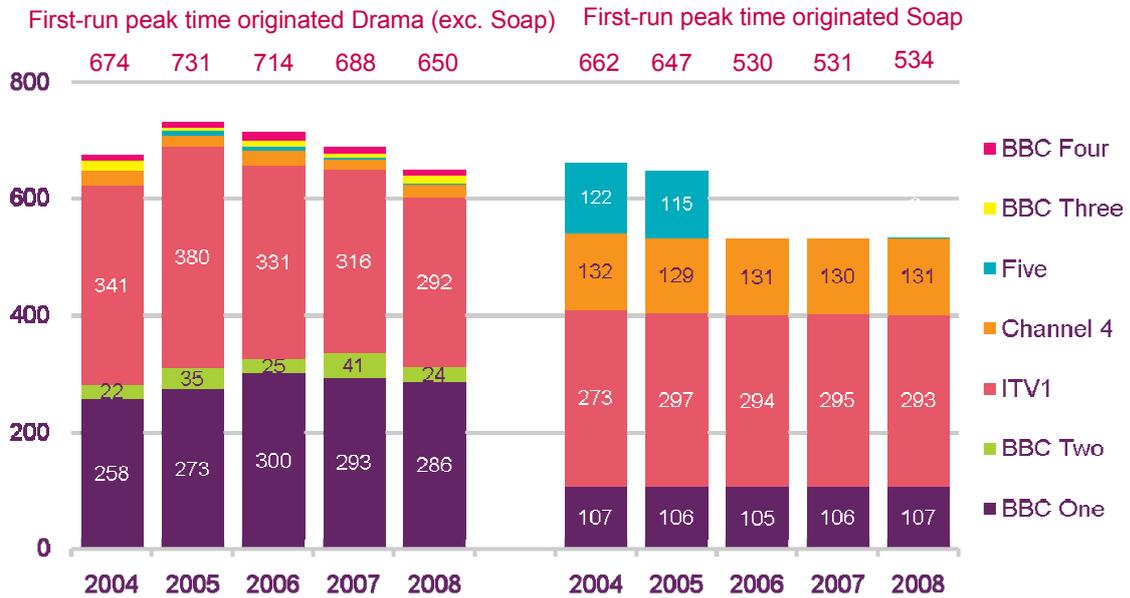
The levels of long-running Drama – or “Soaps” – have remained steady over the last three years, with BBC One, ITV1 and Channel 4 maintaining the consistency of their regular titles (*EastEnders*; *Coronation Street*; *Emmerdale*; *Hollyoaks*) with the same weekly frequencies.

However, the amount of other originated first-run Drama has decreased to 650 hours, particularly noticeable since the peak of 731 hours (or 14 hours a week) in 2005. The main reason for this fall is the reduction, by 23%, in ITV1’s output since 2005. This has gone down from 380 hours to 292 hours, due in part to a cut in the number of episodes of *The Bill* but also because of a reduction in the volume of other new Drama series and serials coming to the screen.

From 2007 to 2008, a decrease of 6% or 38 hours was seen across the channels; again driven by decreases on ITV1 (24 hours or 8%) and BBC Two in this period (17 hours or 41%).

Figure 15.1: Peak-time first-run originated Drama and Soaps output hours, 2004-2008

Hours per of output per year, PSB channels



Source: Broadcaster returns

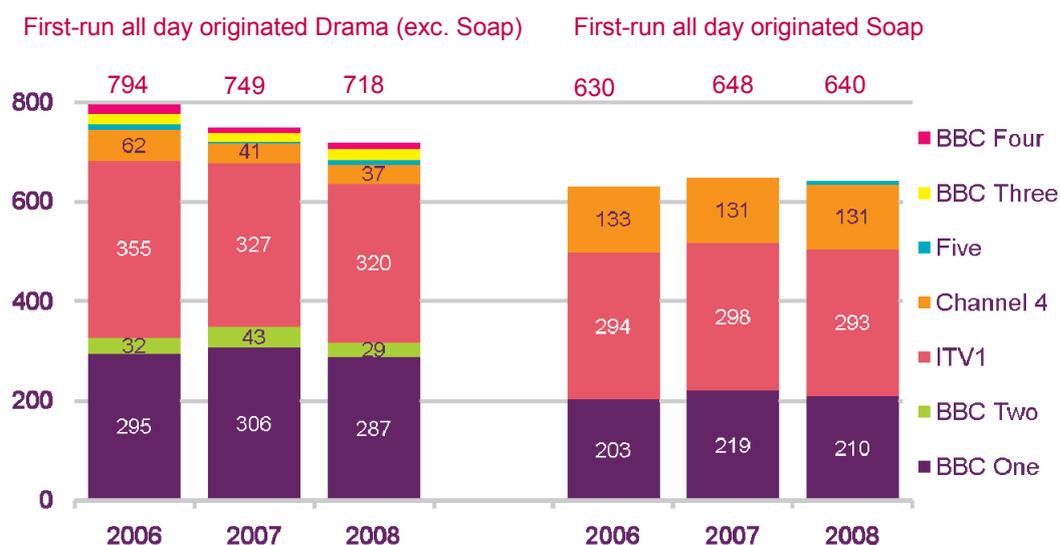
Figure 15.2 shows the same information as above, but for the full 24 hours rather than just for peak time.

The number of hours of first-run Soaps commissioned or produced by PSBs and shown across the day has remained relatively constant over the last three years at between 630 and 648 hours a year (around 12 hours a week).

First-run originated Drama, excluding Soaps, decreased by about 10% over the same period, primarily because of reductions on ITV1 and Channel 4 and to a lesser extent on BBC One and Two.

Figure 15.2: UK Drama and UK Soaps – All channels, all day, first-run originations

Hours per of output per year, PSB channels



Source: Broadcaster returns

Sport

The volume of Sport rises and falls in direct relationship to the sporting calendar. In 2004 and to a lesser extent in 2008, volumes were higher as a result of coverage of the Olympics and in 2006 the number of hours of Sport went up to 4,699 hours, due in part to coverage of World Cup football that summer. The amount of televised Sport shown by each broadcaster is also largely affected by the sports rights won and lost.

BBC One and Channel 4 each broadcast just over 800 hours of Sport in 2008, with BBC Two offering more - at 976 hours (or 18 ¾ hours a week). Of the five main PSB channels, Five proved to be the channel showing most Sport—peaking at 1,600 hours in 2006 but reducing to 1,203 hours (23 hours a week) by 2008. Most of this output was shown late at night and consisted of different types of sport not routinely covered by other terrestrial channels, such as motorsport, major league baseball, Italian football and NBA basketball.

Figure 15.3: Sport output hours, 2004 – 2008

Hours per year, all day hours



Source: Broadcaster returns

Figure 15.4 shows that the total volume of Sport in peak viewing hours reached 501 hours in 2008 (boosted by Olympics coverage). BBC Two showed more Sport in peak time (179 hours in 2008) than other PSB channels, followed by Five showing 109 hours. BBC One and ITV1 each broadcast around 85 hours in peak time, much of which consisted of football, while Channel 4 showed no Sport at all in peak time in 2008 or 2007.

Figure 15.4: Sport output hours, peak time 2004 – 2008

Hours per year, peak time hours



Source: Broadcaster returns

UK Comedy

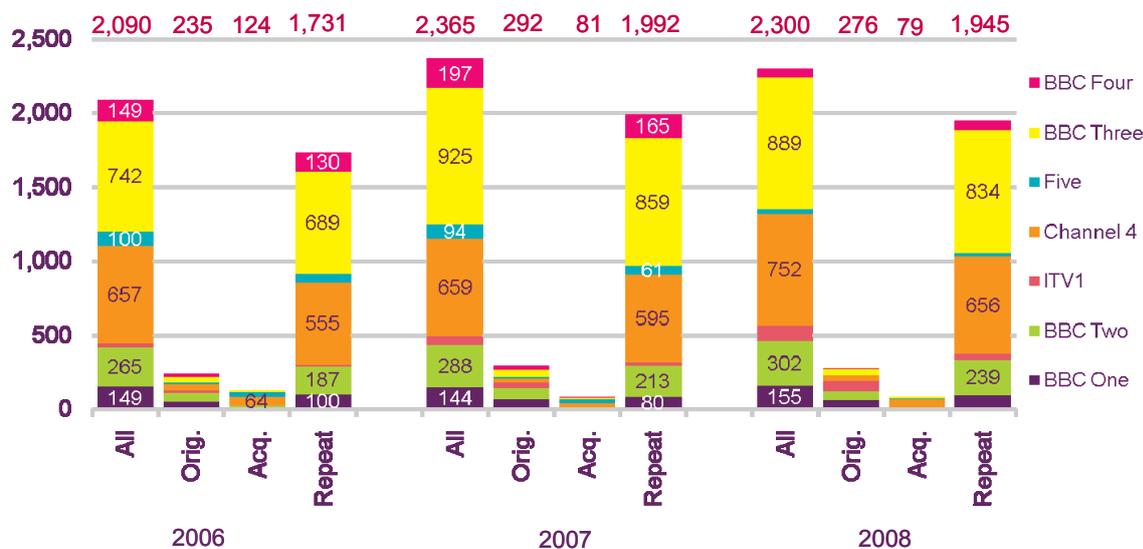
Comedy programmes take different formats, including satire, stand-up comedy, sketch shows and situation comedy. Successful Comedy programmes can rate highly because of their innovation and originality, reflecting the UK's culture and sense of humour. These types of programmes can be difficult to get right and expensive to produce and, if successful, tend to be repeated to maximise their impact and value in the programme schedules.

Figure 15.5 compares the volumes of Comedy programming all day from 2006 to 2008. In the last two years about 84% of Comedy programmes on PSB channels were repeated, with only around 12% being first-run originated Comedy and the remaining 4% being bought-in programmes, mainly sitcoms from the US. More repeats were shown on the BBC's digital channels, on BBC Two and on Channel 4 than on the other PSB channels.

Total Comedy output increased from 2,090 hours in 2006 to 2,365 hours in 2007, reducing slightly to 2,300 hours in 2008 while repeats went up from 1,731 hours in 2006 to 1,945 hours in 2008. ITV1 broadcast more first-run originated comedy programmes in 2008 (70 hours) than any other single channel, with a variety of Comedy formats including *Al Murray's Happy Hour*, *Moving Wallpaper*, *Headcases* and *Harry Hill's TV Burp*.

Figure 15.5: Comedy output – all time, 2006-2008

Hours per year all day



Source: Broadcaster Returns

By contrast, the number of hours of Comedy shows in peak time has decreased over the last two years, from a total of 560 hours in 2006 to 500 hours in 2008 of which 280 (56%) were repeats. But more first-run original programmes were shown in the last two years – 204 hours a year – up from 161 hours in 2006. A far higher proportion of first-run original comedy programmes were shown in peak time – 41% in the last two years – than were shown in the rest of the day.

Figure 15.6: Comedy output – peak time, 2006-2008

Hours per year peak time



Source: Broadcaster Returns

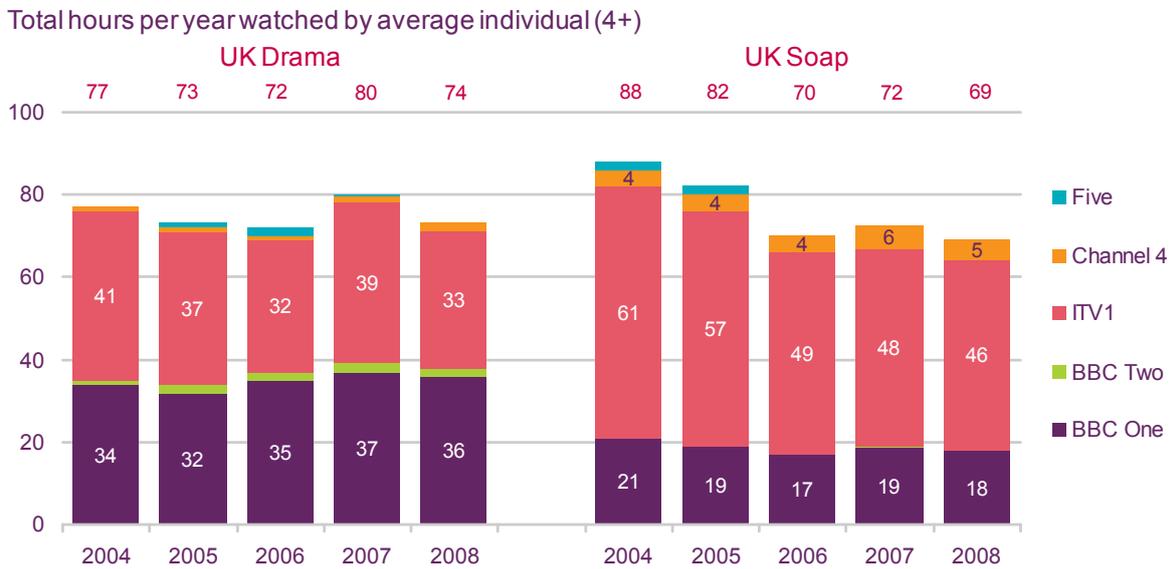
Viewing figures

UK Drama and Soaps

Figure 15.7 shows that the total annual hours of viewing of UK Drama peaked in 2007 at 80 hours of viewing per year by the average individual. In 2008 this figure fell to 74 hours, with viewing fairly evenly split between BBC One and ITV1.

Viewing of UK Soaps has fallen year on year since 2004, rising slightly in 2007 only to fall again to its lowest in 2008 (69 hours) since 2004 (88 hours). While viewing of UK Soaps is dominated by ITV1 (67% of viewing), the actual hours of viewing of ITV1 has declined from 61 hours in 2004 to 46 hours in 2008.

Figure 15.7: Total viewing hours of UK Drama and UK Soaps (main PSB channels only) 2004-2008



Source: BARB 2004 - 2008

Sport

Figure 15.8 shows the total hours spent viewing Sport on the main PSB channels. Levels of viewing of this genre varies more than most, according to events within in the year, e.g. whether particular sporting events have taken place such as World Cup or the Olympics. BBC One continued to be watched for the greatest proportion of hours in 2008 (33 hours), followed jointly by BBC Two (16 hours) and ITV1 (15 hours).

Figure 15.8: Total viewing hours of Sport (five main PSB channels only) 2004-2008

Total hours per year watched by average individual (4+)



Source: BARB 2004-2008

UK Comedy

Average yearly hours of viewing of UK Comedy have declined from 14 hours in 2004 to eight hours in 2008. The majority of viewing has traditionally been on BBC One; while this was still the case in 2008, the overall number of hours viewed on BBC One fell from eight hours in 2004 to five hours in 2008.

Average hours of UK Comedy watched per year per individual on the five main PSB channels remains at a similar level in 2008 as in 2007 (eight hours per year per average individual).

Figure 15.9: Total viewing hours of UK Comedy (five main PSB channels only) 2004-2008

Total hours per year watched by average individual (4+)



Source: BARB 2004 - 2008

Annex 1

Survey methodologies

This annex includes information about the research data sources within this report. Further detail and the data¹²⁴ itself for official statistics can be found at:

<http://www.ofcom.org.uk/research/stats/psb/>

Ofcom PSB Tracker

Data collection

The Ofcom PSB Tracker is conducted via telephone interviews (CATI) with adults aged 16 and over. The first full year of fieldwork was 2006. Fieldwork is conducted each year during four months: January, April, July, and October, chosen to represent the range of the broadcast year. In 2006, a total of around 1,874 interviews were conducted per quarter (approximately 1070 in England; 268 in Scotland; 268 in Wales; 268 in Northern Ireland). In 2007 and 2008, a total of around 1,750 interviews were conducted per quarter (approximately 990 in England; 250 in Scotland; 250 in Wales; 250 in Northern Ireland).

The average interview length in 2008 was 22.25 minutes. Fieldwork was conducted by GfK NOP.

The Welsh sample was boosted each quarter with an additional 50 interviews among viewers of Welsh language programming on S4C to enable reporting on S4C. Respondents were offered the option of a Welsh language interview if preferred.

Weighting

Quotas were applied and survey data were weighted to be nationally representative of adults 16+. Weights were applied to: gender, age, region, social grade and ethnicity, using data from mid-2004 population estimates (ONS). The Welsh boost survey data were also weighted, but to a profile of adults 16+ who watched any Welsh language programmes.

Main questionnaire

The focus of the questionnaire is questions asking respondents to rate specific TV channels on different aspects of broadcasting relating to the PSB purposes and characteristics.

Respondents were asked to individually rate each channel that they watched regularly. The channels list comprised BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three, BBC Four, BBC News and BBC Parliament. Those who viewed any of these channels regularly or occasionally were also asked to consider all of the channels together for each of the research statements. Statements on BBC Three, BBC Four, BBC News and BBC Parliament

¹²⁴ Please note that data are shown on these tables, regardless of base size. Extremely low effective base sizes (those 0 - 30) are marked with two asterisks whilst low effective base sizes (between 31 - 100) are marked with one asterisk. Data shown in columns marked in this way may not be statistically robust and should be treated with caution.

were only asked of multi-channel households. BBC News 24 was added to the questionnaire in April 2007 and was changed to 'BBC News (formerly called BBC News 24)' in the survey in July 2008. BBC Parliament was also added in July 2008.

They were asked to rate the channel in relation to a statement on a 10-point scale where 10 is the highest score and 1 the lowest. Previously to July 2008 viewers were asked the extent to which they felt the statement applied (10 = applies completely; and 1 = does not apply at all) to each channel. Both statements were tested against each other in July 2008.

The order of channels was rotated to minimise order bias. Fifty per cent of the sample was asked about channels in order A below, and the remaining asked in order B¹²⁵:

- A: BBC One, BBC Two, BBC Three, BBC Four, BBC News, BBC Parliament, ITV1, Channel 4, Five, all channels combined
- B: ITV1, Channel 4, Five, BBC One, BBC Two, BBC Three, BBC Four, BBC News, BBC Parliament, all channels combined

Respondents were also asked to rate how important it is that the PSB channels together fulfil the PBS purposes and characteristics. This provides useful context for the data on how the PSB channels are rated on these elements. From Q4 2007, half of the sample group were asked about 'personal and societal importance' whilst half were asked about 'general importance'.

Questionnaire modules

During each quarterly period of fieldwork, one of two 'modules' was inserted into the main questionnaire. These modules were inserted as follows in 2008:

Quarter One (3rd - 31st January) = Digital channels module (respondents were also asked to rate a selection of non-PSB channels and PSB digital portfolio channels if they were regular or occasional viewers of these)

Quarter Two (1st - 30th April) = Digital channels module

Quarter Three (1st - 31st July) = Teletext module

Quarter Four (1st - 31st October) = Digital channels module

In the digital channels module respondents were also asked to rate a selection of non-PSB channels and PSB digital portfolio channels if they were regular or occasional viewers of these. The digital channels module was of a similar structure to the main questionnaire, asking respondents to state the frequency with which they watch a variety of digital channels: ITV2, E4, Sky1, More4, UKTV History/Yesterday, Sky News, Discovery Channel, MTV, and Living. (MTV was removed in quarter 4 2008). Those who watched each channel regularly or occasionally were then asked to rate these channels on a number of statements relating to four main areas (news, current affairs and other factual programmes, programmes in general and what you get from them, reflecting real people in today's society and

¹²⁵ Randomising the order of all channels was piloted. However, this introduced interview fatigue. In the pilot, statements were both randomised and grouped together by area (e.g. News statements together). It was found that the number of incomplete interviews was lower where statements were grouped together.

programme quality). Only relevant statements were asked of each channel so that, for example, statements concerning News were not asked for those channels where News is not shown.

The digital channels module differed from the main survey in that satisfaction with ‘all channels combined’ and ‘importance rating’ questions were not asked. However, the decision to analyse only the responses from ‘regular viewers’ in the survey was also extended to the digital channels module.

The Teletext module (Quarter 3 2008) firstly explored the frequency with which Teletext, Ceefax, BBCi and Skytext were used and then asked respondents to name (from a precoded list) the types of information they accessed on digital and analogue Teletext. The final section asked respondents to rate digital or analogue Teletext for seven statements on a scale of 1 to 10, where 10 was the highest rating and 1 was the lowest. These statements referred to topics such as the frequency with which Teletext is updated, its relevance to its audience and the quality of its news and general content.

From 20th to 22nd June 2008, an additional omnibus was carried out by GfK to investigate online use of public service content (PSC). In January 2009, this became a new standard interchangeable module within the PSB Tracker telephone survey. This questionnaire was designed to explore the types of PSC viewed on the internet, how this content is found and respondents’ opinions of the content.

Those who claimed to use the internet for public service content were asked the extent to which they agreed with five statements such as ‘The internet is a good source of new public service content’. All respondents (regardless of their use of the internet) were asked to rate the importance of 15 statements, where 1 means not at all important, and 10 means extremely important. These statements were designed to address similar topics to the main survey and included statements such as ‘Helps me to learn and find out about subjects.’

Welsh Boost

During each quarter of fieldwork, a Welsh boost questionnaire was run alongside the main survey. This questionnaire mirrored the content of the main questionnaire, (with the same statements being rated) but asked only about S4C, all channels combined and importance ratings. The interchangeable modules used in the main questionnaire were not inserted into the Welsh Boost. Those who did not watch any of the S4C programmes in Welsh, and those who did not watch S4C *regularly* were screened out.

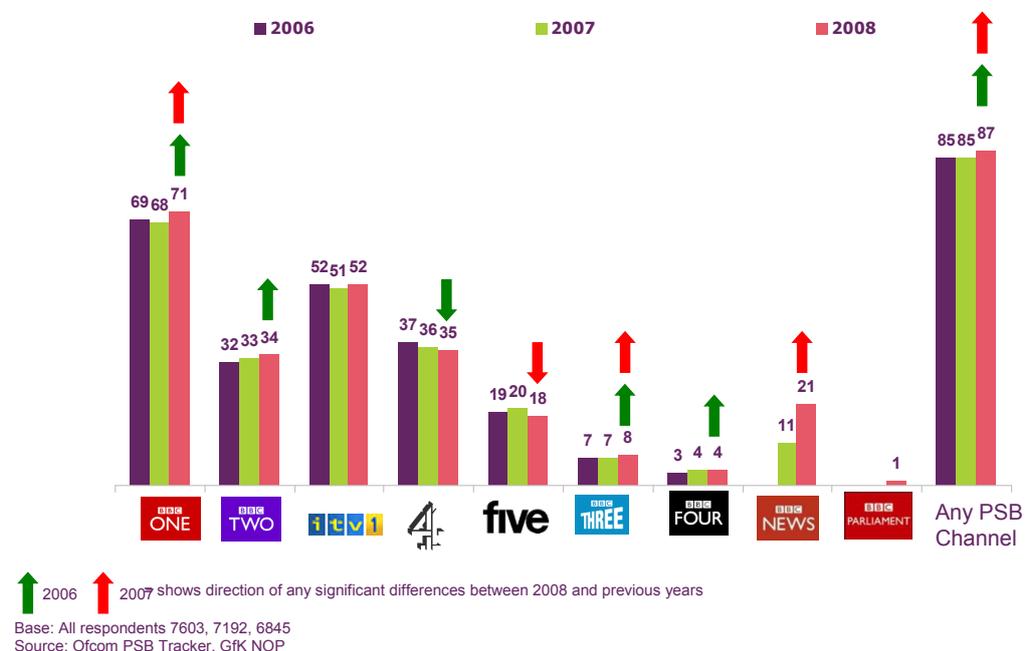
Analysis conventions

The majority of analysis was carried out on ‘regular’ viewers. Regular viewers provide a more informed opinion as they are more involved with the channels, and rely less on potentially out-of-date or unfounded perceptions of the channel. Moreover, including occasional viewers increases the level of “don’t know” responses, thereby reducing the granularity of the insight provided.

Outlined below in figure A1.1 are the proportions of people who define themselves as regular viewers of each of the PSB channels. This shows that in 2008 a higher proportion of the adult population say they are regular viewers of BBC One, BBC Two, BBC Three, BBC Four and BBC News in comparison to either 2006 or 2007. However, significantly fewer people say they are regular viewers of Channel Five compared to 2007 and significantly fewer people say they are regular viewers of Channel 4 compared to 2006. The proportion of the UK population claiming to be regular viewers of ITV1 remains the same as 2006 (after a dip

of 1% in 2007) with regular viewers of Channel Four also remaining largely stable (1% lower than 2006 and 2007). Overall, a significantly higher proportion of the UK population claim to be regular viewers of any of the PSB channels outlined below.

Figure A1.1: Proportion of UK sample who are self-claimed regular viewers



The profiles of self-defined regular viewers of the PSB channels are outlined below in Figure A1.2. As maybe expected in the run-up to digital switchover, all channels regular viewers are changing in terms of their ownership of different television platforms. Regular viewers of BBC Two are more likely to be female and of DE socio-economic grade in 2008 in comparison to 2006, while regular viewers of BBC One are slightly older in 2008 compared to 2006. Five's viewers were less likely to be in socio-economic grades DE in 2008 and less likely to be from ethnic minority groups than in 2006 and 2007.

Figure A1.2: Profile of regular viewers of each channel, 2006 - 2008

%		BBC One			BBC Two			ITV1			Channel 4			Five			BBC Three			BBC Four			BBC News		
		2006	2007	2008	2006	2007	2008	2006	2007	2008	2006	2007	2008	2006	2007	2008	2006	2007	2008	2006	2007	2008	2006	2007	2008
Sex	Male	47	47	47	54	53	51	41	44	43	46	46	44	43	40	40	46	46	50	53	56	53	-	59	56
	Female	53	53	53	46	47	49	59	56	57	54	54	56	57	60	60	54	54	50	47	44	47	-	41	44
S E group	AB	20	19	20	24	22	21	15	16	16	20	19	19	12	14	14	15	15	13	22	20	22	-	20	19
	C1C2	50	50	49	49	47	46	50	50	49	51	52	51	47	47	52	51	54	53	49	47	48	-	47	51
	DE	31	31	32	28	32	32	35	35	36	29	29	30	41	39	35	35	31	34	28	33	29	-	33	30
Age	16 - 44	46	46	46	35	36	35	46	46	47	55	54	56	43	49	46	71	72	70	49	50	46	-	46	42
	45 - 64	36	33	34	40	38	37	35	34	33	30	29	28	37	33	33	21	17	20	35	32	34	-	35	37
	65+	18	20	21	25	27	27	19	20	20	15	16	15	20	18	20	9	11	9	16	17	20	-	19	21
TV	DTT only	21	21	15	26	24	16	21	20	14	22	20	12	21	17	9	-	-	-	-	-	-	-	-	-
	Digital TV	76	77	84	72	74	83	76	78	85	76	78	86	76	81	89	100	100	100	100	100	100	-	100	100
	Freeview	28	32	38	33	36	44	27	30	37	31	34	42	32	38	44	40	40	45	47	48	50	-	39	42
	Cab/sat	50	48	52	41	41	45	52	50	53	47	47	52	46	45	52	64	64	59	55	56	52	-	65	63
	Nation	England	83	83	83	85	84	84	82	82	82	84	85	83	83	82	82	85	85	82	85	87	79	-	81
Scotland	9	9	9	8	8	8	9	9	9	9	9	10	10	10	10	9	8	7	10	10	6	12	-	11	
Wales	5	5	5	5	6	5	5	5	6	4	3	3	5	5	6	5	5	5	4	5	6	-	6	6	
NI	3	3	3	2	2	2	3	3	3	3	3	3	2	3	3	2	2	3	2	2	3	-	2	3	
Ethnicity	White	94	94	94	95	96	96	95	95	95	94	93	94	90	91	93	90	92	93	92	90	92	-	89	89
	EMG	6	6	6	5	4	4	5	5	5	6	7	6	10	9	7	10	8	7	8	10	8	-	11	11

Base: (Regular viewers of each channel) 5220 4938 4850 2420 2378 2334 4027 3724 3587 2746 2524 2339 1424 1405 1262 481 476 541 247 287 317 796 1507

Source: PSB Tracker, GfK NOP Media, Oct 2006 - 2008



Shows direction of significant differences from 2006 to 2008 and 2007 to 2008 at 95% confidence level

Reporting conventions

Viewers were asked to rate each channel (and the channels taken together) out of 10, and the top four scores (7-10) were used to calculate responses, correlating to a very/quite response. Throughout the report this is expressed as the channel is “rated highly on...”.

Ofcom Omnibus - March 2009

Data collection

The Ofcom March Omnibus was conducted via telephone interviews (CATI) with adults aged 16+. Fieldwork was conducted from 6 March to 8 March 2009 and comprised 1002 interviews. The sample was designed to be representative of all adults in telephone-owning households in the UK and quotas were set in terms of region, sex within age and social class.

Weighting

Quotas were applied and survey data were then weighted to be nationally representative of adults 16+. Weights were applied to gender, age, region, and social grade.

Questionnaire

The questionnaire was designed to explore respondents' television viewing habits and their attitudes towards television in general. Questions were included to investigate their use of on-demand, DVRs and internet viewing. Respondents were also asked to express the extent to which they agreed with a number of statements relating to their satisfaction and enjoyment of television, for example: '*There is now a greater choice of programmes available to me.*'

Broadcaster output data

Genre definitions

The output data in this report are collected by Ofcom from the broadcasters each year, as part of their PSB returns. Outlined below are the definitions used for the data in this report:

News

- Newscast or news bulletin providing national, international or regional News coverage.
- News magazines which may contain a range of items related to news stories, with comment and elements of general interest.
- Coverage of parliamentary proceedings and political coverage.
- Weather forecasts and bulletins, including reports on air quality, tide times etc.

Current Affairs

- A programme that contains explanation and analysis of current events and issues, including material dealing with political or industrial controversy or with public policy.
- Topical programmes about business matters and financial issues of current interest.
- Political debates, ministerial statements, party conferences.

Arts & Classical Music

- A programme displaying or presenting a cultural or artistic performance or event.
- Programmes providing information, comment or critical appraisal of the arts.
- The subject matter can cover theatre, opera, music, dance, cinema, visual arts, photography, architecture and literature.

Religious

- All forms of programming whose focus is religious belief, for example: programmes intended to provide religious inspiration through words and/or music, and informational programmes explaining doctrine, belief, faith, tenets, religious experiences or topics providing a religious world view.
- Coverage of religious acts of worship of all faiths.
- Life Experience: Moral, Ethical, Spiritual - exploring one or more of the following issues at some point in the programme: (i) a recognisable religious perspective forming a significant part of the overall narrative; (ii) an exploration of people's daily lives whose attitudes could be said to be informed by a religious background or tradition; (iii) an exploration of people's perception of, and attitudes to, philosophies

which address the big questions of life that affect them. These must demonstrate an approach that bears in mind a religious faith/belief context.

Education

- Programmes with a clear educational purpose, usually backed by specially prepared literature publicised on screen and in other appropriate ways. Includes programmes for Schools, BBC Learning Zone and Open University programmes.
- Programmes reflecting social needs and promoting individual or community action. Also includes Campaign weeks on particular subjects, e.g.: bullying, drugs.

General Factual

- All types of factual programmes, included in the genres listed below.

Specialist Factual

- History - programmes about historical times or events, including programmes about archaeology
- Nature & Wildlife - natural history and programmes about environmental issues.
- Science & Technology - programmes about scientific issues, new discoveries, medical matters and new technological developments

Other Factual

- General factual programmes, including consumer affairs.
- Lifestyle programmes, hobbies and leisure interests, including makeover shows.
- Daytime magazine programmes and talk shows
- Coverage of special events, not generated by the broadcaster, including commemorative events, royal events.

Factual Entertainment

- Popular factual material, including reality shows, docusoaps and other Factual Entertainment.

Drama

- All drama including comedy drama and TV movies but excluding soaps which are classified separately.
- Docu-drama - based on reality, telling the story of actual events.

Soaps

- Drama programmes with a continuous storyline and fixed cast, normally with more than one episode each week and shown every week of the year and usually (but not necessarily) of 30 minutes duration.

Films

- All feature films that have had a prior theatrical release including films commissioned by the broadcaster.

Entertainment

- All forms of entertainment programme, including panel games, chat & variety shows, talent contests
- Quiz and game shows
- Pop music video shows
- Contemporary music - coverage of popular music events and performances, such as OB concerts or as-live studio based shows.

Comedy

- All forms of scripted comedy, satire, stand-up, and sketch shows
- Situation comedy - dramatised entertainment in a humorous style, usually with a fixed cast and generally of 30 minutes' duration.

Sport

- All forms of sports programming including coverage of sporting events.

Children's

- All types of programmes designed for a children's audience, including:
 - Drama
 - Entertainment shows, including weekend magazines and animations and cartoons, including puppets which are designed for a children's audience.
 - General information programmes and News for children.
 - Education and factual programmes for pre-school children.

BBC-GfK Pulse survey of audience reaction to programmes

The Pulse survey collects measures of audience reaction to programmes across a range of channels on a daily basis. Whilst BARB audience measurement data gives quantitative measures of the number of people who watch TV, the Pulse survey provides a quantitative measure of why viewers have chosen to watch and what they think of the programmes they have watched. The Pulse measures provide tools that provide assessments of the impact made by programmes transmitted by the PSB channels in the UK.

Methodology

This report includes data from the BBC Pulse survey – an online, nationally-representative panel survey of over 19,000 viewers (including Northern Ireland, Scotland, Wales and England), conducted on behalf of the BBC by GfK NOP.

Panellists are presented with the previous day's schedules for all the terrestrial channels plus BBC Three, BBC Four, E4 and Sky1, and S4C in Wales. Once they have selected the programmes they viewed they are asked a number of questions about them. Some

questions are specific to the BDS (Broadcasting Dataservices) genre into which a programme falls, some are cross-genre questions (e.g. on appreciation) and sometimes panellists are asked additional programme-specific questions dependent, on the research needs of the BBC.

The panel is not informed that the survey is conducted on behalf of the BBC, to avoid influencing answers, and the survey is presented with GfK branding. The Pulse survey is also carried out online, and while it represents the opinions of online users, results are weighted to be demographically representative of the UK population.

Analysis considerations

Panellists score only those programmes that they have watched for at least five minutes; generally they will be scoring programmes that they have chosen to watch. As such, average scores are relatively high, and lower scores in the Pulse survey are likely to represent strong dissatisfaction. In this report, ratings are aggregated into channel and genre-level summaries.

It should also be noted that results are calculated on the basis of the number of responses, not respondents. In this way, multiple transmissions of a programme over a period of time can register more than one response from the same respondent. This means that for a given measure, it is not automatically possible to extrapolate views of the population as a whole. Responses are aggregated to provide an indication of the strength of opinion about a particular programme or programmes. Over 5,000 responses are collected each day.

Given that Pulse scores are presented by responses, not respondents, the Pulse data and PSB Tracker data are not directly comparable.

This methodology is useful when looking at Pulse scores overall, as it can be considered that the opinions of dedicated viewers may greatly influence the overall measures of opinion. Therefore the core measure of agreement along with the number of responses represents both an opinion score for the programme and for its popularity. For example, if a programme has a high number of responses and a high score, this shows that a high number of people both watched the programme and liked it. A programme with fewer responses and the same high score, would suggest that fewer people watched it, but those that did liked it.

Genre classification

In the Pulse survey, programmes are aggregated by genre lists in accordance with Broadcasting Dataservices' (BDS) classifications. This differs from BARB and broadcaster returns' genre classification. Initially therefore genres are not directly comparable. In previous PSB Annual Reports the BDS Specialist Factual genre was amended by Ofcom to more closely fit the BARB and broadcaster returns' classifications. However, for the analysis of 2008 Pulse data GfK NOP worked to overlay the BARB genre classifications onto the Pulse data to produce data that is as comparable as possible with the other data sources reported within this report. Therefore within this report, the figures including Pulse data analysed by genres show 2008 data only.

Annex 2

Selected non-PSB channels' and PSB portfolio channels' contributions to PSB

Introduction

Viewers' perceptions on selected non-PSB digital TV channels and PSB digital portfolio channels have been included in the *PSB Annual Report* for the second time and are the focus of this annex¹²⁶.

Note: although some of the channels reported within this section are part of the PSB broadcasters' families of channel, they do not have PSB remits (e.g. ITV2, E4, More4)

These data are from the Ofcom PSB Tracking survey and are reported in order to provide useful context to the results relating to the PSB channels. This is important as digital TV continues to grow in the UK (see section 1 of this report). However, it should be noted that the main PSB channels are mixed-genre channels with a number of different PSB remits, while the other channels are often focus on a single type of content and face different commercial pressures. Channels other than the five main PSB channels may also have smaller, but more loyal audiences. It needs to be borne in mind that these two different types of service are not directly comparable.

Summary findings

- UKTV History (now rebranded as Yesterday), Sky News and Discovery Channel all tended to be rated particularly positively by their regular viewers in 2008, with the majority of viewers rating the channels highly across the majority of elements of PSB they were asked about.
- In particular Sky News and UK TV History were rated particularly positively in relation to purpose 1 by regular viewers, while UK TV History and Discovery Channel were rated particularly highly on elements of purpose 2.
- Of the aspects of the PSB purposes and characteristics asked about, regular viewers of ITV2, More4, E4, Living, and Sky1 in 2008 were more likely to rate the channels highly on particular characteristics than other elements; having *engaging* programming and having programmes viewers want to watch, having well-made high *quality* programmes, and being a channel that regular viewers *trust*.

Background

We focused on viewers' perceptions of selected non-PSB digital TV channels and PSB digital portfolio channels, in order to provide context to the main PSB channels. Each channel was asked about in turn, in the context of selected research statements relating to the PSB purposes and characteristics.

As with the main PSB channels, the audience impact of the other channels was collected using the PSB Tracker survey. From July 2007 onwards, respondents in multichannel

¹²⁶ Data on multichannel viewing is included in more depth in section 2 of this report.

households were asked to rate some of the digital channels that they watched. These channels were chosen to provide a range of data across channels which are either linked to PSB channels, may be thought of as competing with particular PSB channels, or are of potential interest due to the genre they focus upon, or the demographic they attract.

Note on findings

The findings in this annex should be viewed as indicative rather than conclusive, because the PSB channels and the non-PSB channels/PSB digital portfolio channels are not directly comparable:

- Most non-PSB channels broadcast specific genres of programming, whereas main PSB channels show a mixed schedule. PSB portfolio channels also tend to focus on specific types of programmes, or programmes that attract a particular demographic. Such specialist channels may have smaller audiences but are more likely to have regular viewers who are particularly interested in the specific genre. It is logical, therefore, that they may have more satisfied viewers because of these viewers' stronger affinity for the genre and because they chose to watch the specialist channel.
- Self-defined regular viewers are likely to rate a channel highly, especially if they pay subscription fees to watch a channel.
- While it is tempting to talk about the channels other than the main PSB channels as a group, the channels selected for this analysis are only a sub-set of a wide array of digital channels - hence we paint an indicative picture only.
- Although we are measuring channels against the purposes and characteristics, channels other than the main PSB channels do not necessarily set out to deliver against these, and face additional commercial pressures.

Audience impact

Figure A2.1 shows opinions of regular viewers of ITV2 on the channel's delivery of elements of the PSB purposes and characteristics that can be considered as being most relevant to the channel and its content. This shows that of the purposes and characteristics asked about, ITV2 was most associated with the characteristics of having *engaging* programming and *having programmes viewers want to watch* (58%), having well-made *high quality* programmes (57%), and being a channel that regular viewers *trust* (51%). The next highest rating for the channel was part of purpose 3 - *having high quality soaps that are made in the UK* (47%).

Figure A2.1: Regular viewer perceptions of ITV2 on selected PSB purposes and characteristics

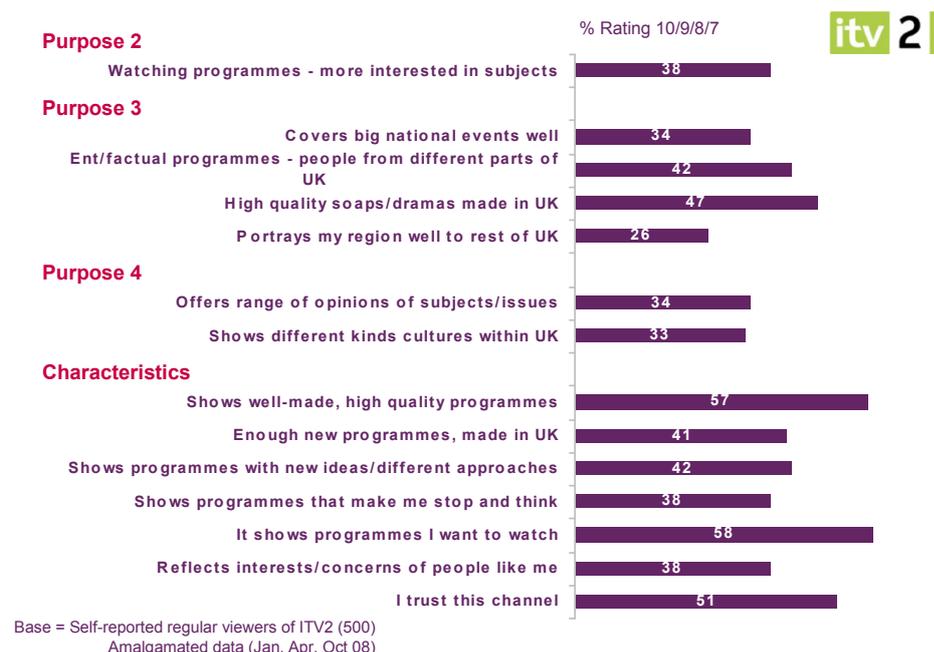
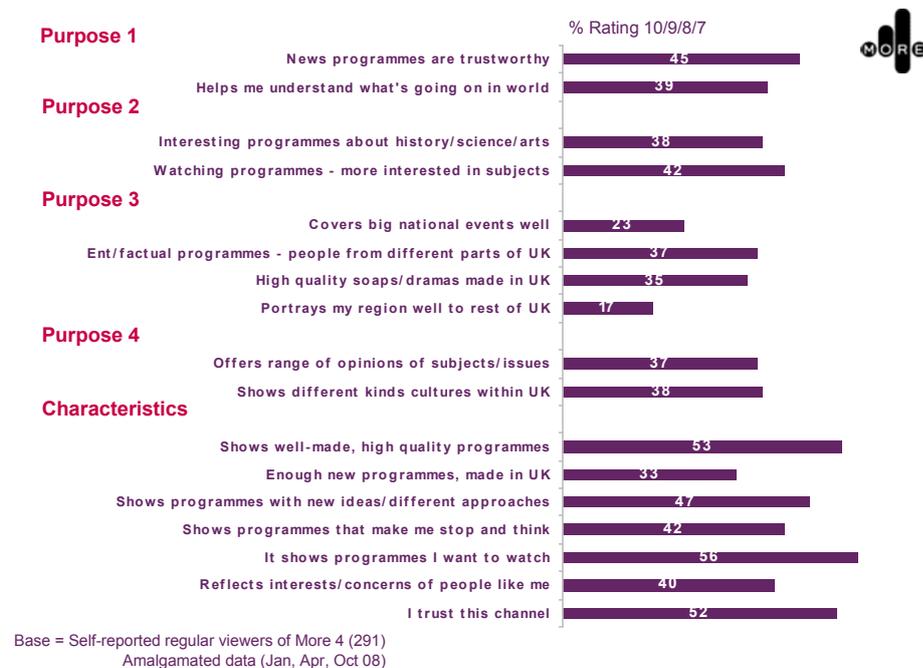


Figure A2.2 shows opinions of regular viewers of More4 on selected elements of the PSB purposes and characteristics. This identifies that More4 gained the strongest ratings on the characteristics of *engaging* by having programmes viewers want to watch (56%), showing well-made *high quality* programmes (53%), and being a channel that regular viewers *trust* (52%).

Figure A2.2: Regular viewer perception of More4 on selected PSB purposes and characteristics



Opinions of regular viewers of E4 on the channel's delivery of selected elements of the PSB purposes and characteristics are shown in Figure A2.3. E4 gained its most positive ratings

on the characteristics of *engaging*, through having programmes viewers want to watch (67%) and showing well-made *high quality* programmes (59%).

Figure A2.3: Regular viewer perception of E4 on selected PSB purposes and characteristics

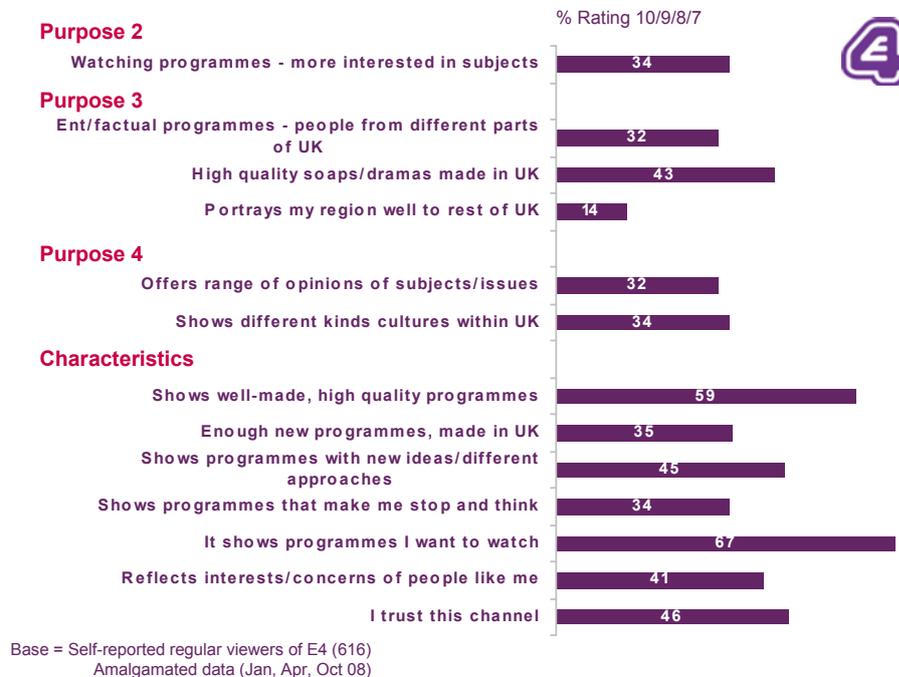
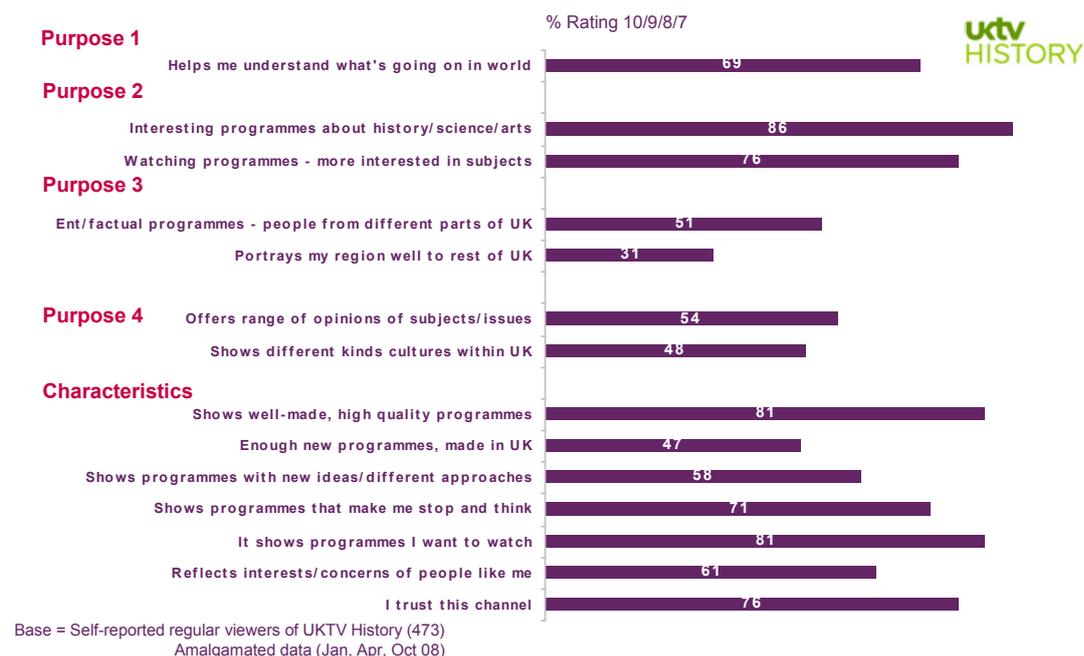


Figure A2.4 shows opinions of regular viewers of UKTV History on the channel's delivery of elements of the PSB purposes and characteristics. Note: UKTV History was rebranded as Yesterday in November 2008.

This shows that regular viewers of the channel tended to have generally positive views of this related to the purposes and characteristics asked about in 2008; over 6 in 10 of regular viewers rated UKTV History highly for over half of the purposes and characteristics. As well as many elements of the characteristics, the channel was seen to perform well in relation to purpose 1 and purpose 2, through *helping viewers understand what is going on in the world* (69%), *having interesting programmes about history, science of the arts* (86%) and *watching programmes makes viewers more interested in subjects* (76%).

Figure A2.4: Regular viewer perception of UKTV History/Yesterday on selected PSB purposes and characteristics



Like UKTV History and the Discovery Channel, Sky News achieved positive views from its regular viewers across many of the purposes and characteristics in 2008. For 12 of the 14 elements of PSB asked about, over 6 in 10 regular viewers rated Sky News highly. Unsurprisingly, the channel was seen to perform well particularly in relation to purpose 1; 88% of regular viewers rated the channel highly on *helping them to understand what is going on in the world* and 82% said that the *news was trustworthy*.

Figure A2.5: Regular viewer perception of Sky News on selected PSB purposes and characteristics

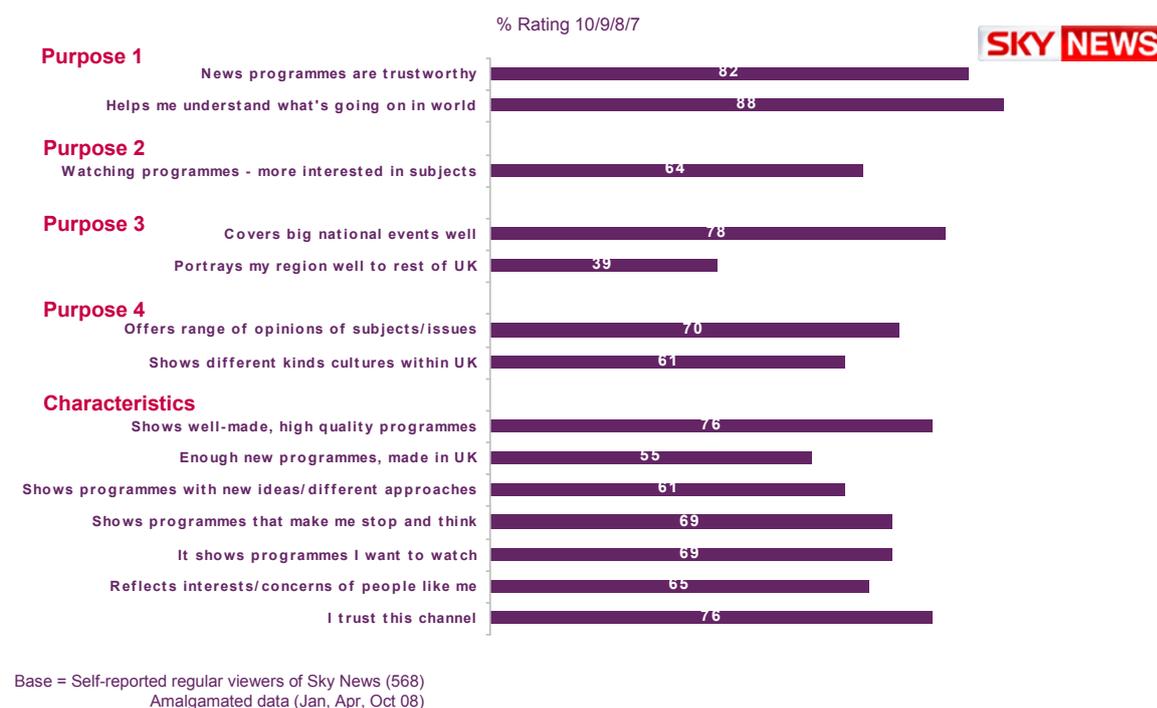
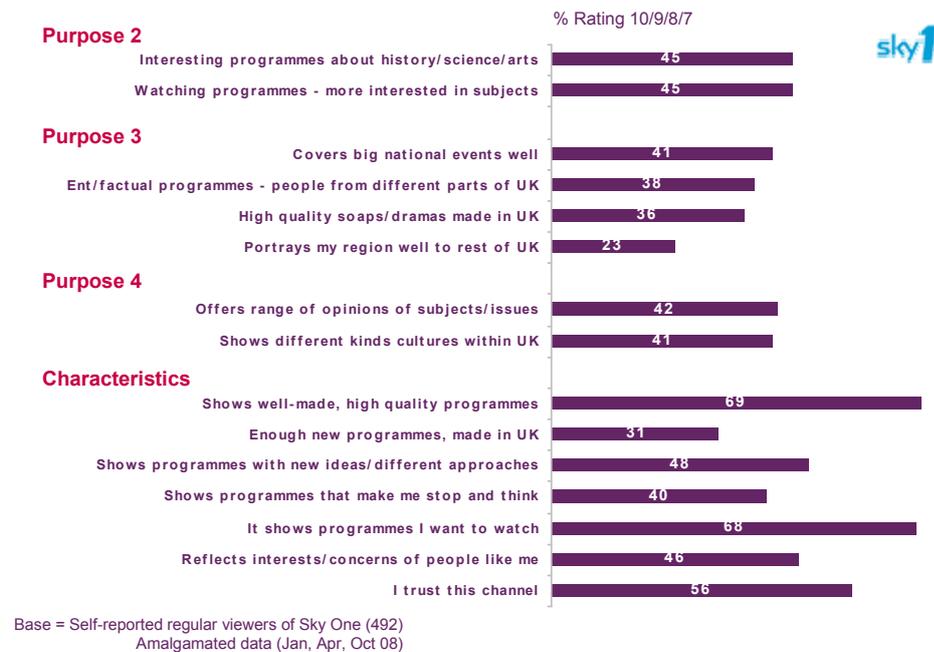


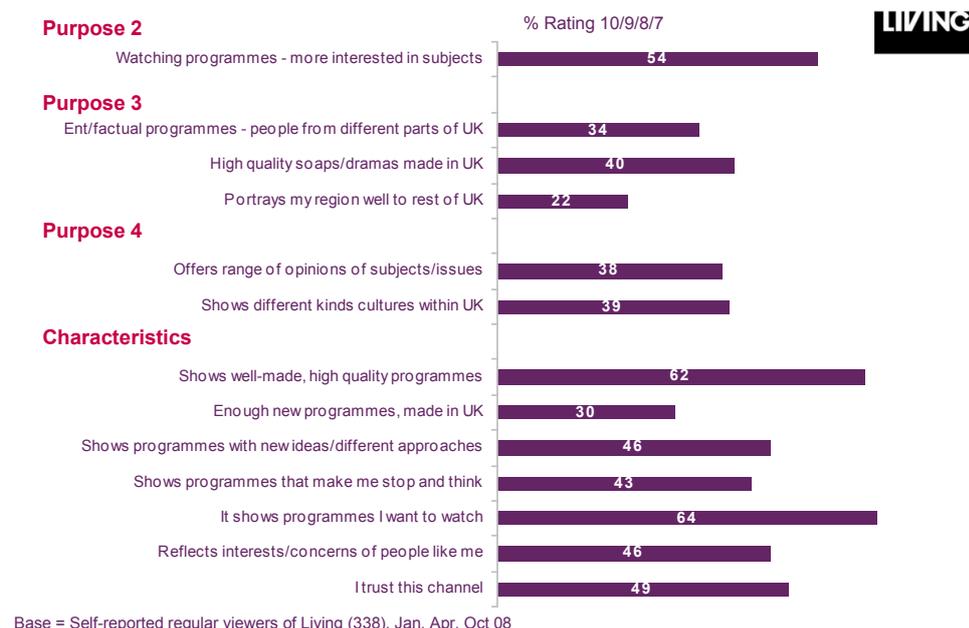
Figure A2.6 shows opinions of regular viewers of Sky1 on the channel’s delivery on elements of the PSB purposes and characteristics. This shows that of the purposes and characteristics asked about, Sky1 was rated most positively on having well-made *high quality* programmes (69%), having *engaging* programming and having programmes viewers want to watch (68%) and being a channel that regular viewers *trust* (56%).

Figure A2.6: Regular viewer perception of Sky1 on selected PSB purposes and characteristics



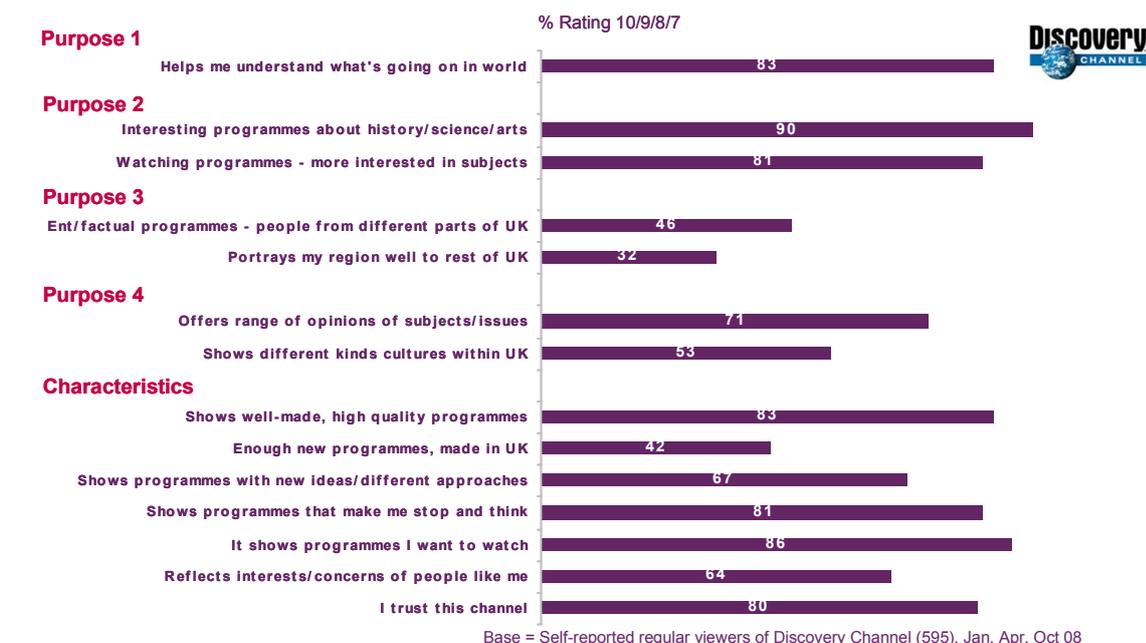
Looking at regular viewers’ opinions of Living’s delivery of aspects of the purposes and characteristics shows that the channel was most likely to be rated highly on having *engaging* programming and having programmes viewers want to watch (64%) and having well-made *high quality* programmes (62%). Regular viewers were also likely to associate the channel and its programmes with *making them more interested in subjects* (54%), which is part of purpose 2.

Figure A2.7: Regular viewer perception of Living on selected PSB purposes and characteristics



Like UKTV History and Sky News, the Discovery channel was rated positively by its regular viewers in relation to many of the elements of the purposes and characteristics in 2008. For 10 of the 14 elements of PSB asked about, over 6 in 10 of regular viewers rated the channel highly. The channel was seen to perform well, particularly in relation to purpose 2, through *having interesting programmes about history, science or the arts (90%)* and providing *watching programmes that make viewers more interested in subjects (81%)*.

Figure A2.8: Regular viewer perception of the Discovery Channel on selected PSB purposes and characteristics



Base = Self-reported regular viewers of Discovery Channel (595), Jan, Apr, Oct 08

Annex 3

PSB online

Introduction

The first review of PSB undertaken by Ofcom in 2004 argued that we were entering a transitional period, in which the old way of funding public service broadcasting would need to give way to a new model. During this transition, the distinctions between 'TV' and 'non-TV' services are blurring and new forms of content and methods of delivery have the potential to help deliver the purposes of public service broadcasting in new ways.

For these reasons, in January 2009 we added a new interchangeable module within the PSB Tracker telephone survey designed to explore Public Service Content (PSC) over the internet. This was based on omnibus research that fed into the Second Review of Public Service Broadcasting. Respondents were given a description of PSC and were asked if they used the internet for PSC.

Note: these questions were intentionally broad, and generally refer to 'content' rather than specifically focusing on viewing television programmes or audio-visual material over the internet. The questions did not explore why some people do not use PSC over the internet.

Summary of findings

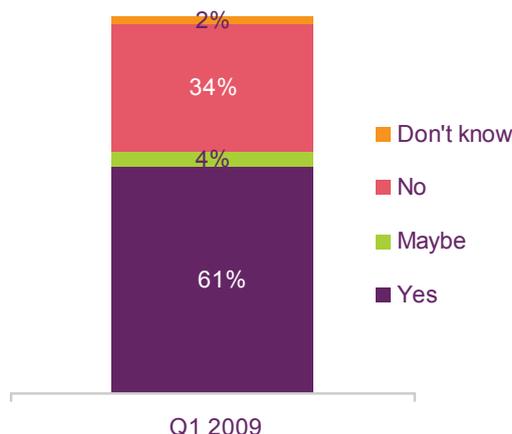
- In January 2009, around 6 in 10 of those you have internet access at home or at work (61%) said they used the internet for PSC.
- Over three-quarters of those claiming to use or maybe use PSC online said they used it for hobbies and interests, for finding out about their local area, looking at News or Current Affairs, looking at Factual or Educational content and finding out about events.
- The most popular way of searching for PSC online was through search engines (94%). Seventy-two per cent of users said they tended to use websites they already knew and trusted, whilst just over 6 in 10 used recommendations from friends (63%) and used links or click through from other sites (61%). Most users of online PSC (84%) said that finding new, interesting or high quality PSC online was easy.
- The majority of users of PSC online and UK adults more generally believed that it was important that the internet fulfilled a range of different roles relating to public service content.

Audience impact: public service content

Within the PSB Tracker in January 2009, those who had internet access at home or work were given a description of PSC and were asked if they used the internet for PSC. Figure A3.1 shows that 6 in 10 (61%) internet users said they used the internet for this and a further 4% thought they 'maybe' used PSC online. Use of PSC online varied by age, with 71% of 16 to 34 year old internet users claiming to use PSC online and 39% of those aged over 65 claiming to do this. Those in AB socio-economic grades were more likely to claim to use PSC online than those in either C1/C2 or DE groups (AB 74%, C1/C2 60%, DE 49%). Sixty-four per cent of male internet users claimed to do this, and 57% of female users said they used PSC online.

Figure A3.1: Claimed use of PSC online

Whether PSC activities are carried out online among those who use/have access to the internet



"Do you ever use the internet for anything that could be described as public service content?"

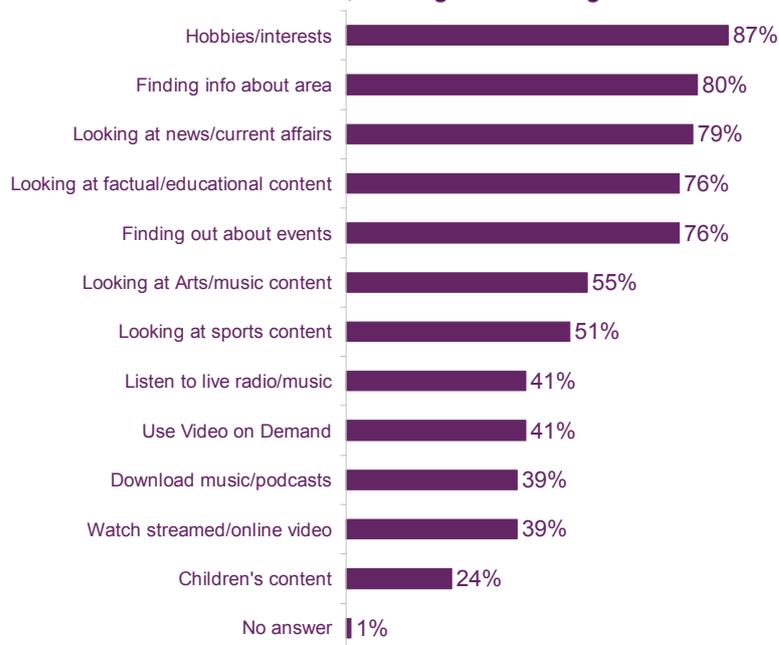
Respondents were given a description of PSC as "Content and websites that does one or more of the following: informs our understanding of the UK or the world, encourages our interests in and knowledge about subjects, brings us together and strengthens our UK culture or makes us aware of different opinions or different cultures. This can cover a wide range of areas like news, current affairs, arts, sports, religion, local information, hobbies and interests amongst other things."

Base: PSB tracker January 09. All adults 16+ who have access to the internet at home or work (1412)

Figure A3.2 shows what particular types of PSC were used by those who said they used or 'maybe' used it online. Nearly 9 in 10 (87%) of those using PSC online said they used it for hobbies and interests. Around 8 in 10 said they used it for finding about their local area (80%) and looking at News or Current Affairs (79%). Just over three-quarters of PSC online users said they looked at factual or educational content (76%) and used it to find out about events such as festivals or sporting events (76%)

Figure A3.2: Types of PSC used online

Types of public service content accessed online, among those using PSC online



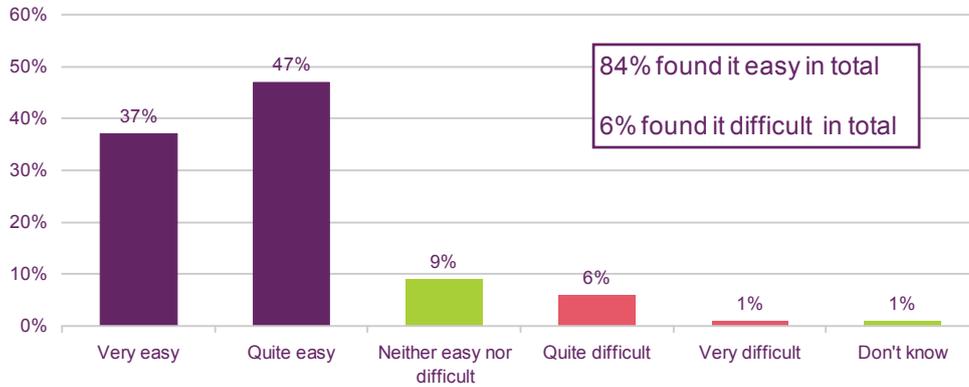
"Still thinking about this type of PSC, which of the following, if any, do you currently use websites for?" (Respondents were given a description of PSC and prompted with the list of types of PSC)

Base: PSB tracker January 09. All adults 16+ All who use/may use the internet for public service content (937) Q1 2009

People using PSC online were asked about their experience of doing this; the results are shown in Figure A3.3. The majority of online PSC users (84%) said they found it either very or quite easy to ‘find new, interesting or high quality PSC online’.

Figure A3.3: Experience of using PSC online: ease of discoverability of PSC

Ease of discovering PSC online, among those using PSC online

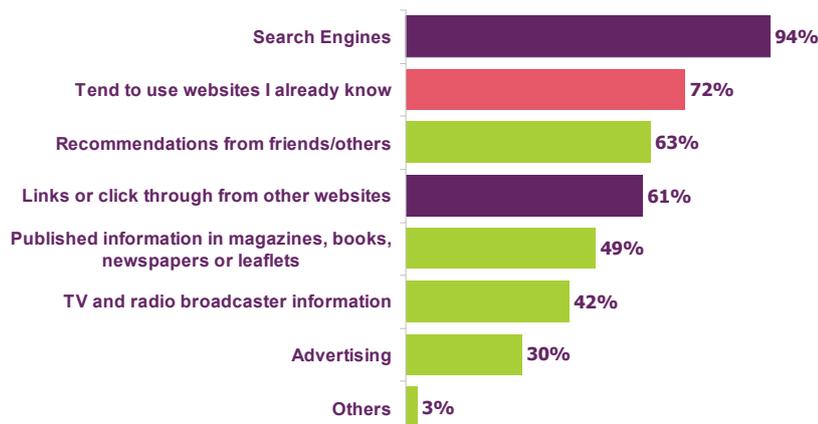


"In your experience, how easy is it to find new, interesting or high quality PSC online?"
 Base: PSB tracker January 09. All who use the internet to access public service content (934) Q1 2009

Figure A3.4 shows that the most popular way of searching for PSC online was through search engines, with 94% of online PSC users claiming to use these. Additionally, 77% said that this was their most frequently-used method of finding PSC online. Seventy-two per cent of internet PSC users said they tended to use websites they already knew and trusted, whilst just over 6 in 10 used recommendations from friends (63%) and used links or click-through from other sites (61%).

Figure A3.4: Experience of using PSC online: method of discovery

How PSC is found online, amongst those using PSC online

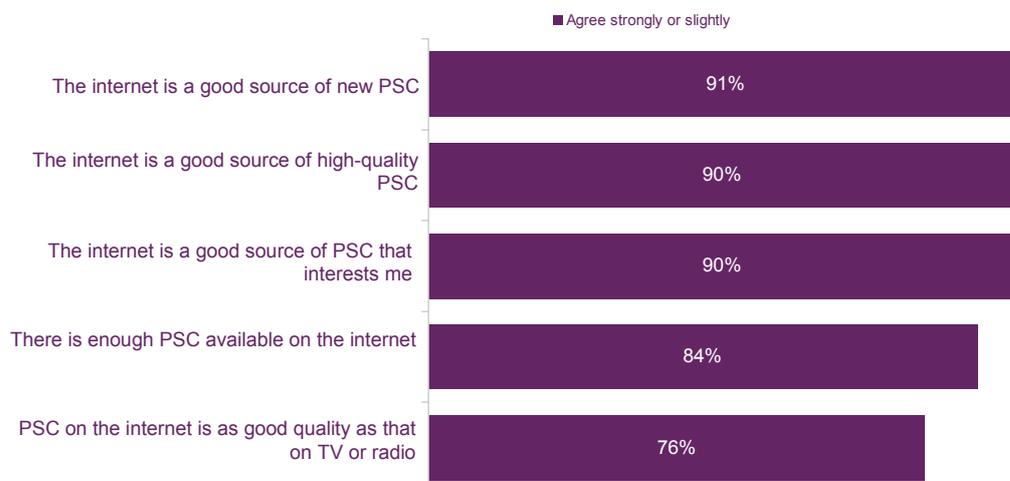


"How do you tend to find new, interesting or high quality PSC on the web?" (prompted)
 Base: PSB tracker January 09. All who use the internet to access public service content (934) Q1 2009

Figure A3.5 identifies that around 9 in 10 users of PSC online agreed that the internet was a good source of new PSC (91%), was a good source of high-quality PSC (90%), and that the internet provided PSC that interests them (90%). Over 8 in 10 also thought there was enough PSC available online (84%). Three-quarters (76%) agreed that PSC on the internet is as good quality as that on television or radio.

Figure A3.5: Experience of using PSC online: quality of content

Agreement with statements on quality of PSC, amongst those using PSC online

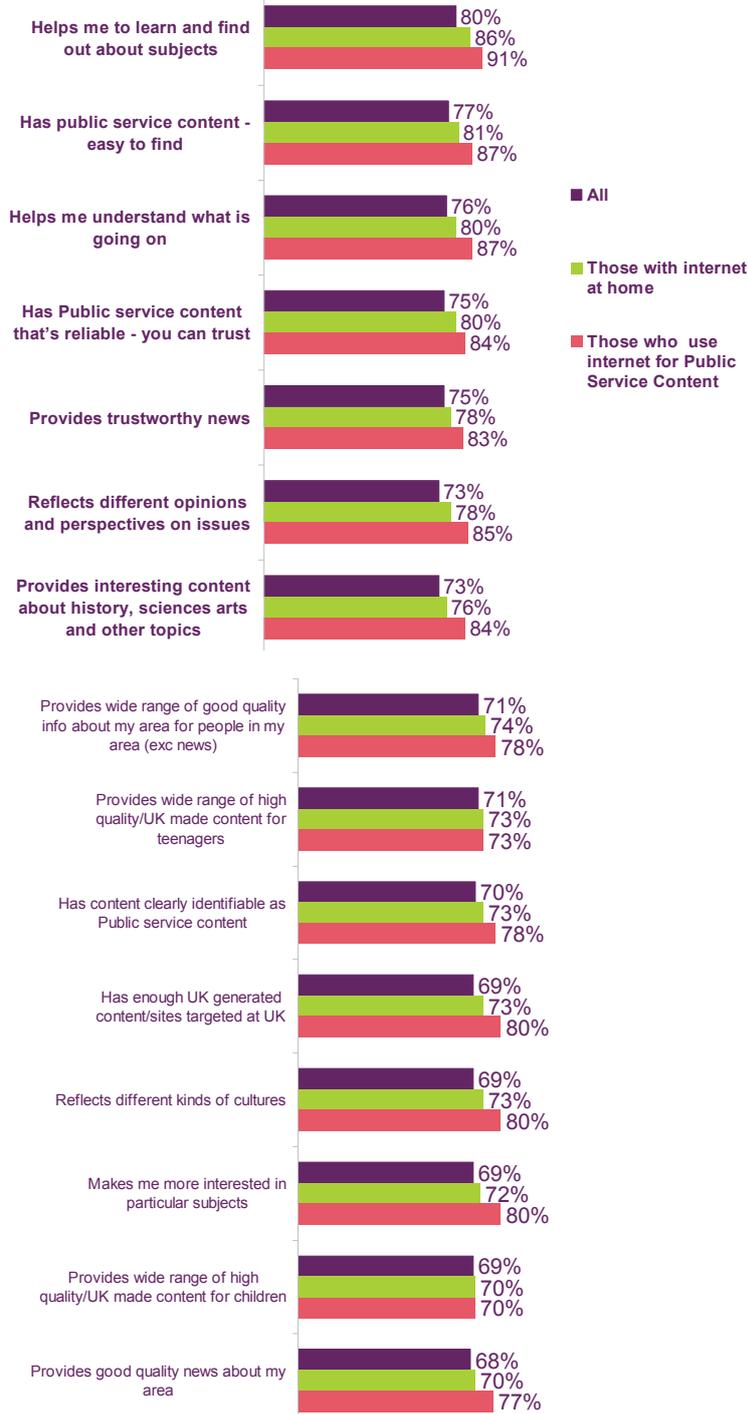


"Thinking again about this PSC, to what extent do you agree or disagree with the following statements?"
 Base: PSB tracker January 09. All who use the internet to access public service content (934) Q1 2009

The majority of users of PSC online and the UK adult population more generally believed that it was important that the internet fulfilled a range of different roles relating to public service content (see Figure A3.6 for details).

Figure A3.6: Importance of PSC delivery online

Importance of delivery by the internet



"How important do you think it is that the internet does each of the following?"

Base: PSB tracker January 09. All (1747); Those with internet at home (1354); Those who use internet for public service content (934)

Annex 4

Perceptions of, and attitudes towards, television

Background

This is the second year in which the data from a number of general broadcasting-related questions have formed an annex to Ofcom's Public Service Broadcasting Annual Report.

The data is taken from Ofcom's Media Tracker. Some of the questions monitored have remained the same since the Independent Television Commission (ITC) first began the survey, then known as The Public's View.

Executive Summary

Viewing habits and preferences

BBC One is the nation's favourite television channel.

- 41% of viewers in analogue terrestrial-only homes said they would choose BBC One if they could have access to only one channel, and 26% of viewers in multichannel homes said this.
- BBC One was the most valued channel among all viewers in analogue terrestrial-only homes (40%) and among viewers in multichannel homes (27%).
- Among viewers in multichannel homes, following BBC One & ITV1, Sky Sports 1/2/3/Extra was the third most popular channel, at 7%; followed by Channel 4 at 5%, and then Five at 4%.
- Younger multichannel viewers (15-24s) were also disproportionately likely to choose Channel 4 and E4 (11% and 9% respectively).

Sources of, and attitudes towards news

Television is most people's main source of world and local news.

- Television was mentioned by 76% of respondents as being their main source of world news and by 49% as being their main source of local news.
- Three-quarters of respondents perceived television news as providing a fair and unbiased source of world news coverage.
- Impartiality of television news was considered important almost universally (93% saw this as important).

Programme standards

While around half of respondents felt that programme standards have remained the same, around a third feel they have got worse.

- 53% of respondents said that television standards had stayed the same over the past year, while 32% said that programme standards on television had got worse.
- Older people were the least happy with standards.
- *More repeats* (62%) and *lack of variety* (34%) were the most-cited reasons why programme standards were felt to have got worse
- BBC One was seen as the most improved channel, in terms of quality, while ITV1 was most often mentioned as the channel on which programme standards had 'got worse'.

The majority of respondents have never been personally offended by anything seen or heard on TV.

- 29% said that they were personally offended by something they had seen or heard on television, although most believed that the things that they personally found offensive should still be allowed to be shown (after suitable warnings).
- Offence levels were highest among older people
- Swearing and offensive language (44%) were the primary causes for complaint, while 32% mentioned violence.
- Channel 4 (39%) and ITV1 (35%) were mentioned most as the channels where offensive material had been seen.

Most viewers believe that there is too much violence, swearing and intrusion into other people's lives on television

- 55% said they thought there was too much violence and 53% thought there was too much swearing.
- In contrast, 54% felt that there was about the right amount of sex shown on television, although 35% still felt there was too much sex.
- 46% said that there was too much intrusion into other people's lives.
- Older people and women were more likely to say that there was too much sex, violence, swearing and intrusion into other people's lives on television.

Protection of children

Around half of all respondents believe that parents and broadcasters are equally responsible for ensuring that children do not see unsuitable programming, while 44% believe it is mainly the responsibility of the parents.

- Knowledge of the watershed continues to be high (91%) although fewer respondents were aware of the actual time it came into force on terrestrial television (80%)
- 39% of multichannel parents claimed they were not aware that on pay-per-view channels it is possible to buy films rated 18 at any time. Just under a fifth, (19%) felt that this function was a bad idea.
- Over a quarter of parents (28%) said that they had actively prevented their children from watching something on television in the last month that they felt was unsuitable (usually by switching over the channel – half mentioned this response).
- 35% of parents in multichannel homes claimed to use parental blocking systems.

Television advertising

Most feel that current levels of advertising on television are acceptable, but many feel that there is already too much

- Among analogue terrestrial-only respondents, 37% feel that current levels of advertising on ITV1, Channel 4 and Five are acceptable' while 26% feel that there is already too much.
- Among cable and satellite respondents, 45% feel that current levels of advertising on ITV1, Channel 4 and Five are acceptable, while 36% feel that there is already too much.
- Among Freeview-only respondents, 46% feel that current levels on ITV1, Channel 4 and Five are acceptable, while 41% feel that current levels are already too much - more than the comparable proportions among analogue-only respondents, and satellite/cable television respondents, at 26% and 36% respectively.
- The proportion of respondents who say that more advertising would be acceptable is low across all respondents, regardless of the TV platform owned.
- When asked specifically about current advertising levels on non-PSB channels, similar proportions of satellite and cable viewers feel that current levels are about the right amount or that there is already too much, at 42% and 40% respectively.

Advertisements are more likely to mislead than offend.

- 26% have ever found an advertisement to be misleading; compared to 15% of the sample who have ever found an advertisement offensive.
- Older people more commonly reported an advertisement to be offensive.

Introduction

Ofcom tracks a number of broadcasting-related questions using the Ofcom Media Tracker. Some of the questions monitored have remained the same since the Independent Television Commission (ITC) first began the survey, then known as The Public's View. These questions on broadcasting continue to provide a valuable picture of viewer opinion. This is the second year in which the data from these questions have formed part of Ofcom's Public Service Broadcasting Annual Report.

The report consists of five main sections. It starts by looking at viewing habits and preferences in terms of television channels. It then explores sources of, and attitudes towards, News, both local and national. We then look at programme standards and attitudes to offensive material on television. Attitudes towards the watershed are reported, with particular emphasis on the protection of children. The report concludes by considering attitudes towards television advertising.

The data reported here were first collected in the ITC's 'Public's View' survey. However, this survey became Ofcom's Residential Tracker in 2005. From 2008 the Residential Tracker then split into two separate surveys – the Technology Tracker and the Media Tracker (the data reported here are collected through the Media Tracker).

The Media Tracker was conducted by Continental Research. It employed face-to-face paper and pencil interviewing (PAPI), conducted in respondents' homes, and among adults aged 15+ who had a working television set in their homes. The data were then weighted to be representative of the UK population. In 2008 the survey was conducted in two waves – with at least four full weeks of fieldwork per wave. The first wave was conducted in April '08 and the second in October '08. In previous years a more continuous method had been used, in which sections of the survey were asked throughout the year. The effect of this is that the 2008 survey data may be more affected by seasonality, media events and public opinion. In addition, in previous years CAPI (computer-aided personal interviewing) was used.

Given the above changes in methodology, **we do not make direct comparisons of results with previous years throughout this report, although the historic data are included within some overview tables. We recommend that the results are more usefully viewed in isolation; providing a picture of public opinion in 2008 which is highlighted in red**

From now on, the Media Tracker survey will continue to be conducted using fieldwork at two points during the year. The PAPI format was employed in 2008, making the data for 2009 onwards directly comparable.

Viewing habits and preferences

Television channels

Traditionally this survey explores channel loyalty, by asking respondents to select their first-choice channel. Respondents are asked the question: *'Thinking of television channels, if you could have only one of the television channels you currently receive at home, which one would you choose?'* The question was asked to analogue terrestrial-only and multichannel respondents separately. Table A4.1 shows the responses to this question. In 2008, the most popular choice among analogue terrestrial-only respondents was BBC One (mentioned by 41%), followed by ITV1, mentioned by 30%.

This was also the case among multichannel respondents, with 26% mentioning BBC One and a fifth mentioning ITV1. Sky Sports 1/2/3/Extra was the most-mentioned multichannel channel (7%). Channel 4 was mentioned by 5% of respondents followed by Five at 4%. E4 and Sky One were both mentioned by 4%. No other multichannel channel was mentioned by more than 3% of respondents.

In 2008 57% of respondents mentioned one of the five main PSB channels as their first-choice channel. If the PSB portfolio channels are also included, the proportion who mentioned one of these as their first choice of channel is almost 70%.

Table A4.1

	All analogue terrestrial-only					All multichannel respondents				
	2004	2005	2006	2007	2008	2004	2005	2006	2007	2008
Base	381	459	346	258	300	596	980	1054	1231	1687
	%	%	%	%	%	%	%	%	%	%
BBC One	43	30	45	43	41	28	30	33	29	26
BBC Two	7	14	9	10	7	3	5	4	5	2
ITV1	26	32	21	23	30	20	23	16	20	20
Channel 4 (S4C in Wales)	11	12	12	10	10	5	5	6	5	5
Five	6	4	5	4	4	3	3	4	3	4
Total terrestrial	93	92	92	90	92	59	66	63	62	57
Total Multichannel	n/a	n/a	n/a	n/a	n/a	36	31	34	34	39

* 'Don't knows and 'none of these' not shown * (Q: 'Thinking of television channels, if you could have only one of the television channels you currently receive at home, which one would you choose?')

As may be expected, the appeal of specific channels differs by demographic group, as shown in Table A4.2. The youngest age group was less likely to mention BBC One and ITV1 than were any other age group. They were also more likely to mention Channel 4 (11%) and E4 (9%). Among the 15-44 age group, it appears that BBC One and ITV1 were similarly mentioned as first-choice channel. BBC One's dominance over ITV1 was greatest within the 65+ age group (by 15 percentage points).

Table A4.2

	Channel would choose if could have only one, by age			
	Age			
	15-24	25-44	45-64	65+
Base: All multichannel	284	653	508	242
	%	%	%	%
BBC One	12	22	33	40
BBC Two	1	1	2	6
ITV1	13	21	22	25
Channel 4 (S4C in Wales)	11	4	2	2
Five	3	4	4	4
Total multichannel	60	47	37	24

* 'Other', 'None of these' and 'Don't know' not shown * (Q: 'Thinking of television channels, if you could have only one of the television channels you currently receive at home, which one would you choose?')

Having established which channel respondents would choose if they could only have one, the survey went on to ask, 'Which one channel would you say you value the most?' In 2008, responses were almost identical to the question about which channel they would choose if they could only have one (Table A4.3).

Table A4.3

	Channel valued the most compared with first-choice channel	
	Valued the most	First choice channel
Base: All analogue terrestrial -only respondents	300	300
	%	%
BBC One	40	41
ITV1	26	30
BBC Two	8	7
Channel 4	11	10
Five	5	4
	Channel valued the most compared with first-choice channel	
	Valued the most	First-choice channel
Base: All multichannel respondents	1687	1687
	%	%
BBC One	27	26
ITV1	19	20
BBC Two	2	2
Channel 4	4	5
Five	4	4

*'Don't know' not shown *(Q: 'Which one channel would you say you value the most?')

Attitudes to television

The survey went on to ask respondents whether they agreed or disagreed with four statements. Table A4.4 details the responses.

In 2008, the statement 'If people want to pay extra to watch particularly sexually explicit programmes not available on other television channels they should be allowed to do so' attracted widespread agreement, a total of 73%, which remained fairly consistent among different age groups, except among the 65+ age group who showed a lower level of agreement (61%). The statement 'If people want to pay extra to watch particularly violent programmes not available on other television channels they should be allowed to do so' also

attracted a high level of agreement (63%), which was higher among the youngest age group (71%).

However, the last two statements attracted more disagreement. For the statement '*Things that are likely to upset or offend even a minority of people should not be shown on television*', agreement was higher among the oldest age group (32% among 65+). This attracted the highest proportion of don't know/no opinion responses than any of the other statements. For the statement '*I think films shown after 10pm should have the sex, violence or swearing cut out*', disagreement was higher, particularly among the younger respondents (69% among the 15-24s and 63% among the 25-44s) and among those with children in the home.

Table A4.4

	Attitudes to four statements about television				
	Strongly agree	Agree	Disagree	Strongly disagree	Don't know/no opinion
Base: All respondents	%	%	%	%	%
(1) If people want to pay extra to watch particularly sexually explicit programmes not available on other television channels they should be allowed to do so	23	50	5	2	20
(2) If people want to pay extra to watch particularly violent programmes not available on other television channels they should be allowed to do so	18	45	11	5	20
(3) Things that are likely to upset or offend even a minority of people should not be shown on television	6	15	33	19	27
(4) I think films shown after 10pm should have the sex, violence or swearing cut out	5	12	36	22	24

Sources of, and attitudes towards, News

Respondents were asked questions about the medium they used to find out about local News and world News, and also about the importance of impartiality of News.

Local news

Respondents were first asked: 'Can you tell me what is your main source of news about what is going on in your own local area?' Television was mentioned most frequently - by 49% of respondents in 2008. This was followed by: 'any newspaper' (23%). Respondents aged 65+ were more likely to mention newspapers (31%), than any other group. Table A4.5 tracks the four main sources of local News since 2000.

Table A4.5

Base: All respondents	Main source of news about what is going on in local area								
	2000	2001	2002	2003	2004	2005	2006	2007	2008
	%	%	%	%	%	%	%	%	%
Television	34	28	48	44	46	46	46	47	49
Any newspaper	31	46	32	37	36	29	29	27	23
Radio	16	14	13	12	12	10	11	10	11
Talking to people	14	7	3	2	5	4	5	6	7

'Don't know' and 'other' not shown *(Q: 'Can you tell me what is your main source of news about what is going on in your own local area?')

Compared to the youngest age group (15-24) respondents aged 65+ were more likely to mention radio (15% and 7% respectively) than any other group, and the youngest age group were much more likely to mention 'talking to people' (11%) than any other age group. The internet was mentioned by 4% of respondents, although this figure was significantly higher among the 15-24 age group (8%).

In order to try to gauge opinion on coverage of local events, respondents were asked whether they agreed or disagreed with the following statement: 'My local/regional television company reports well on events and news in my local area'. On the whole the majority (71%), agreed with this statement, with agreement highest in Scotland and lowest in London.

World news

Respondents were asked about their main source of world News. Table A4.6 shows the data relating to this question. Television was still mentioned as the main source of world News by the majority of respondents in 2008. The internet was mentioned by 6% of respondents in 2008.

Table A4.6

Base: All respondents	Main source of world News								
	2000	2001	2002	2003	2004	2005	2006	2007	2008
	%	%	%	%	%	%	%	%	%
Television	72	66	79	78	77	72	72	70	76
Any newspaper	13	16	9	10	11	10	10	8	6
Radio	9	14	8	7	7	9	8	9	7

* 'Don't know' and 'other' not shown *(Q 'Can you tell me what is your main source of news about what is going on in the world today?')

Younger respondents (15-24) were less likely to name television (65%), and more likely to name the internet (15%), compared to the average person. Three per cent of respondents aged 15-24 claimed that their main source of world news was talking to people, and four per cent claimed they did not get/watch news. Those in the highest socio-economic grades (AB) were less likely to name television, compared with those in the lowest socio-economic grades (DE), at 70% and 80% respectively. Those in AB socio-economic grades were also most likely to mention radio (10%), and newspapers (9%).

Respondents were then asked which one television channel was their preferred source for getting world news. The highest response was news shown on BBC One, mentioned by 32% of respondents. This was followed by BBC News/BBC News 24, which was mentioned by almost a quarter of respondents (23%). News on ITV1 was mentioned by 21% of respondents and Sky News by 12%. Among respondents aged under 45, news on BBC One, news on ITV1 and the BBC News channel were mentioned equally (by 24% of respondents). Respondents aged 45+ were significantly more likely to mention news on BBC1 as their preferred channel compared with respondents under 45.

A further question asked respondents which, if any, sources they trusted and felt presented fair and unbiased world news coverage. Overall, more respondents felt that television gave a fair and unbiased source of world news coverage, mentioned by 75% of respondents. Respondents in the highest socio-economic grades (AB) were more likely to mention radio (10%), compared to those in the lowest socio-economic grade (DE) at 5%. The internet was mentioned by 4% of respondents; younger respondents (15-24s) were more likely to choose the internet (7%) compared to respondents aged 65+ (2%). Overall, newspapers were mentioned by 3% of respondents, significantly higher amongst those in the highest socio-economic grades (AB) compared to those in the lowest socio-economic grades (DE), 3% and 1% respectively.

Impartiality of news

Respondents were read out the following paragraph: *'When talking about the news, impartiality means that each side is reported with equal weight, and that the organisation doing the reporting is not allowed to express their views on the merit of each side of the case. In the UK, television and radio channels are required by law to be impartial. Newspapers and the internet, while still having to be accurate, do not need to be impartial. How important do you personally think it is that news in general is impartial?'* Almost two-thirds of respondents (64%) felt that it was 'very important'; a further 27% felt it was important. Overall only 1% of respondents felt that it was unimportant. Respondents were then asked how important they personally felt it was that news from a variety of different sources was impartial. A strong majority of respondents felt that it was important for television news to be impartial (93%), followed by radio (88%), then newspapers (87%), Teletext (80%), internet (77%) and magazines (74%).

Programme standards

Overall standard of television programmes

Respondents were asked how they felt about quality and standards within programmes. First they were asked a general question: 'Do you feel that over the past year, television programmes have improved, got worse or stayed the same?' Table A4.7 details the trends in the responses to this question since 1999. The proportion saying that programmes had got worse was 32%, although the majority response was 'stayed the same', mentioned by 53% of respondents.

Table A4.7

Base: All respondents	Opinions about television programmes in general: 1999-2008									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
	%	%	%	%	%	%	%	%	%	%
Improved	8	13	12	12	15	10	10	13	10	13
Got worse	31	28	46	47	40	42	40	35	41	32
Stayed the same	59	59	41	40	44	46	47	49	46	53

*Don't knows not shown *(Q: 'Do you feel that over the past year, television programmes have improved, got worse or stayed the same?')

The age of the respondent had a significant bearing on their responses. Older people tended to be less likely to say that programmes had 'improved' or 'stayed the same', and were more likely to say that they had 'got worse' (39% of 45+ compared with 26% of those under-45s). Those respondents in analogue terrestrial-only homes were more likely to say that programmes had 'stayed the same', compared to those in multichannel homes (56% and 52% respectively). Looking specifically at platform breakdown, 27% of those in analogue terrestrial-only homes felt that standards had 'got worse'; compared with 30% of respondents in satellite or cable homes and 38% in Freeview-only homes. A greater proportion of satellite or cable respondents also stated an improvement in standards compared to analogue terrestrial-only and Freeview-only respondents; 15%, 11% and 9% respectively.

Table A4.8

	Total 2008	Opinions about all television programmes, by age and platform						
		Age				Platform		
		15-24	25-44	45-64	65+	Analogue terrestrial-only	Satellite or cable	Freeview-only
	%	%	%	%	%	%	%	
Base	1987	333	732	597	325	300	1080	592
Got worse	632	19	29	35	46	27	30	38
Improved	252	18	14	11	7	11	15	9
Stayed the same	1044	59	54	52	44	56	53	50

*Don't knows not shown *(Q: 'Do you feel that over the past year, television programmes have improved, got worse or stayed the same?')

Those respondents who said that programme standards had improved were asked to specify in what ways they felt this had happened (overall numbers of these respondents are small,

at around 13% of the total sample, so the figures should be treated as indicative only). The main response was *'Wider range of programmes'* mentioned by 57% of respondents, followed by *'Improved quality'* cited by 36%.

The survey then went on to ask those respondents who said that programme standards had got worse in what ways they felt standards had fallen. As has been found in previous surveys, the most popular response was *'More repeats'* (62%) followed by people saying *'Lack of variety'* (34%). Around 13% of respondents said *'Too many reality programmes'*; while the total proportion of respondents mentioning *'more sex'*, *'swearing'* or *'violence'*, as a reason for declining standards was 9%, 14% and 15% respectively. Older respondents (45+) were generally more likely to mention *'swearing'* or *'violence'* both at 18%, compared to respondents under 45 years old, at 9% and 11% respectively.

Quality of programmes and channels

Respondents were then asked whether programmes had improved, got worse or stayed the same, specifically in terms of quality. Over half of all respondents claimed that, in terms of quality, programmes had *'stayed the same'*, (59%). Over 1 in 5, 22%, felt that programme quality had *'got worse'*, while 15% of all respondents said that programme quality had improved. There was some variation between ages, and as in the previous question, those aged 45+ were much more likely to say that programmes had *'got worse'* in terms of quality (28%), than respondents aged under 45 (16%), although the majority (59%), felt that programme quality had *'stayed the same'*. Similar proportions stated that programme quality had *'improved'* - 16% of respondents under 45, compared to 15% among those aged 45+. Those who claimed that there had been an improvement, or worsening, of programmes in terms of quality were asked on which channels these changes had occurred (Table A4.9).

BBC One was the channel most mentioned by respondents as having *'improved'* in terms of its quality; while ITV1 was mentioned most as the channel having *'got worse'* in terms of programme quality.

Table A4.9

	Channel which had improved and which had got worse in terms of programme quality	
	Those who said programme quality had 'improved'	Those who said programme quality had 'got worse'
	298	431
	%	%
BBC One	56	53
ITV1	40	56
C4	22	31
BBC Two	15	23
Five	15	19

*Don't knows not shown *(Q: 'And on which channels has the quality of programmes got worse/improved over the last year?')

Offensive television content

The survey asked respondents, *'Have you personally ever found anything on television to be offensive?'* Table A4.10 shows the trend data for this question. In 2008, 29% of respondents reported that they had found something on television offensive.

Table A4.9

Base: All respondents	Overall levels of reported offence: selected years											
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Respondents offended	37	31	32	29	42	42	41	32	32	30	32	29

(Q: Have you personally ever found anything on television to be offensive?)

There were variations in the proportion of people reporting offence, across the different age groups (Table A4.11).

The youngest age group (15-24s) was the least likely to report having been offended; only 14% compared with 42% of respondents in the oldest age group, 65+. Other demographic differences observed were that males were less likely to have been offended than females (26% and 32% respectively).

Table A4.11

Base: All respondents	Overall levels of reported offence by age				
	Total	15-24	25-44	45-64	65+
	1987	333	732	597	325
	%	%	%	%	%
Yes	29	14	26	36	42
No	71	86	74	64	58

*(Q: 'Do you personally see or hear things on television which you find offensive?')

The survey went on to try to ascertain on which channel(s) the offending material had been seen. The following table lists the results for the five most-mentioned channels. Channel 4 was mentioned the most frequently; by around four in ten of respondents who had reported something offensive.

Table A4.12

Base: All who saw or heard something offensive	Channels said to carry offensive material: 2004-2008				
	2004	2005	2006	2007	2008
	697	502	486	458	581
	%	%	%	%	%
BBC One	28	25	28	29	24
BBC Two	17	17	15	15	8
ITV1	37	35	30	31	35
Channel 4	47	37	35	42	39
Five	26	19	18	19	18

*(Q: 'And on which channel or channels have you seen or heard something offensive in the last year?')

Respondents who had named a particular channel as having carried offensive material were asked about the nature of the offensive content on that channel. While there were slight variations across the five main channels, overall the main responses related to 'bad language' (44%), 'violence' (32%), 'sex' (26%), and 'bad taste/shock tactics' (26%).

The respondents who had reported offence were then asked: *'What do you generally do when you are offended?'* Around half (51%) said that they switched over to another channel, while nearly one-third (32%) claimed to switch off. About 5% said that they continued watching/did nothing. The age of the respondent was a key factor in how they reacted to being offended. Among the 15-24 age group 14% claimed that they switched off, while among the 65+ group this figure was 40%.

A further question was asked of those respondents reporting offence, asking them to choose which of three statements best described their attitude towards offensive material on television (Table A4.13).

Table A4.13

Base: All who saw or heard something offensive	Attitude towards offensive material - 2008						
	Total	15-24	25-44	45-64	65+	Male	Female
	581	46**	189	212	134	255	326
	%	%	%	%	%	%	%
Should not be shown	22	19	19	22	27	24	20
Others should be allowed to see	34	43	31	36	31	38	31
I think such things should only be shown after a clear warning	36	32	36	36	36	31	39

* Don't knows not shown *(Q: 'And which of these statements best describes your attitudes towards things which have offended you on TV?') ** small base – results not robust and should be used only for indicative purposes

As can be seen from the previous table, over a third (36%) of respondents felt that material they had found to be offensive should still be shown, but only after a clear warning had been broadcast. The youngest age group (15-24s) were more likely to say that, although they had been offended, others had the right to watch the material if they wanted to. Twenty-seven per cent of those offended and aged 65 and over said that the things that had offended them should not be shown.

The survey asked all respondents whether they thought there was *'too much'*, *'too little'* or the *'right amount'* of each of the four aspects; sex, violence, swearing, and intrusion into other people's lives, on television (Table A4.14).

Overall, most respondents felt that there was too much coverage including *'violence'*, *'swearing'* and *'intrusion'*. In respect of *'sex'* the majority of respondents (54%) thought that there was *'about the right amount'*, although more than one in three respondents, 35%, felt there was too much sex on television.

Table A4.14

Base: All respondents (1987)	Opinions about the amounts of coverage of four aspects of television			
	Sex	Violence	Swearing	Intrusion into other people's lives
	%	%	%	%
Too much	35	55	53	46
Too little	3	1	1	2
About the right amount	54	39	41	40
Don't know	9	5	5	12

*(Q: 'Do you think in general that there is too much, too little or about the right amount of sex/violence/swearing/intrusion on television?')

Older people were more likely than younger people to say that there was *'too much'* of all four aspects. Similarly, females were more likely than males to say there was too much of all four aspects on television.

The respondents who said that there was *'too much'* of any of the four aspects on television were then asked how they felt about it (whether they were offended, or not bothered). Nearly two-thirds of those respondents who claimed that there was *'too much'* violence on television said that they were offended by it (65%); regarding swearing, this was higher at 70%. In the case of *'sex'*, 64% of respondents who felt that there was *'too much'* on television said they were offended by it. Intrusion into other people's lives was regarded as offensive by a slightly lower proportion of the respondents (who thought there was *'too much'* of it on television), at 62%.

Respondents were also asked whether they agreed or disagreed that certain programmes showed material containing unfair treatment of people or organisations. Thirty-nine per cent agreed with this statement, with 32% of respondents offended by this. Those aged 65+ were more likely to be offended than the youngest age group, the 15-24s (42% and 20% respectively), as were those in higher socio-economic grades (34% of ABC1s compared with 31% of C2DEs).

Protection of children

Protection of children

The survey went on to consider attitudes towards the protection of children. The first question began by asking all respondents who they think is responsible for ensuring that children do not see unsuitable programmes. Table A4.15 details the responses since 2004.

In 2008, around half (49%) of the respondents believed it was the responsibility of both the broadcasters and parents equally, to protect their children from seeing unsuitable programmes, while 44% believed it was mainly the responsibility of the parents.

Table A4.15

	Responsibility for children's viewing				
	2004	2005	2006	2007	2008
Base: All respondents	1034	2896	1451	1473	1987
	%	%	%	%	%
Mainly parents	45	43	43	42	44
Mainly broadcasters	5	5	5	4	4
Both equally	49	51	51	53	49

*Don't knows not shown *(Q: 'Do you think it is mainly the responsibility of parents, broadcasters or both equally, to make sure that children don't see unsuitable programmes?')

The survey went on to explore respondents' knowledge of the existence of the watershed: *'Broadcasters are required to show television programmes which are not suitable for children only after a certain time in the evening. Before now, were you aware of this?'* Knowledge of the watershed continued to be high at 91%.

Respondents who were aware of the watershed were asked whether they knew at what time it came into force on terrestrial television. The majority correctly said that it was at 9pm (80%). This correct time was then confirmed by the interviewer, and respondents were then asked whether they thought that 9pm was *'too early'*, *'too late'* or *'about right'*. Over two-thirds said that 9pm was *'about right'* (Table A4.16).

Table A4.16

	Opinions about the 9pm watershed					
	2003	2004	2005	2006	2007	2008
Base: All respondents	1186	1034	2176	1451	1473	1987
	%	%	%	%	%	%
Too early	25	32	26	25	23	15
Too late	7	7	6	6	8	8
About right	66	57	64	67	65	70

*Don't knows not shown *(Q: 'On terrestrial TV channels the time after which these programmes may be shown is 9pm, usually known as the 9 o'clock watershed. Do you think this is too early, too late or about right?')

Respondents in multichannel homes were asked whether they were aware that on pay-per-view channels, where each film can be ordered individually, viewers can watch 12, 15 and 18-rated films at any time. *Were you aware of these rules for pay-per-view channels before I described them?* About half, 52%, of respondents claimed that they were aware, while 39% said they weren't. Younger respondents had higher levels of awareness; 58% among those

aged 15-24 compared to 29% among those aged 65+. Respondents with children had higher levels of awareness, at 59% compared to 46% among those without children.

Multichannel viewers were then asked for their opinion about programmes watched on a pay-per-view basis, and whether or not they thought that the rule (which enables people to watch films classified as 12, 15 and 18 at any time with the provision of a PIN number) was a good idea. Nearly half of these respondents, 48%, felt that it was a good idea. Less than 1 in 5 (19%) thought that it was a bad idea.

Parents in the sample were asked whether in the last month they had actively prevented their child/children from having access to certain television programmes that they felt were unsuitable. Twenty-eight per cent claimed that they had.

Those respondents who said that they had actively prevented their children from viewing unsuitable material were asked how they had done this (Table A4.17). They were most likely to say that they had 'switched channel' (50%), followed by 'turned off' (29%).

Table A4.17

	Actions taken to prevent access to certain programmes		
	Totals		
	2006	2007	2008
Base: All parents of children under 16 who had actively prevented access to a programme	152	123	170
	%	%	%
Turned off	36	36	29
Switched channel	42	43	50
Telling them	14	14	9
Sent to bed	25	25	16
Parent lock (equipment/software to prevent children accessing certain TV programmes)	13	11	13
Take them out of room	7	9	8

* Don't knows not shown *(Q: 'And how have you prevented your child(ren) having access to certain programmes on TV?')

The survey then asked all those respondents in multichannel homes whether their multichannel system had a feature which enabled them to block access to certain channels. Forty-six per cent claimed that their system did have such a feature, one in four (25%) said that it didn't and three in ten (30%) said they didn't know. Those with children in the household were more likely to be aware of the system (60%), compared to those without children in the household (34%).

The vast majority (81%), of respondents who claimed that their multichannel system had a blocking feature said that the system worked by using a PIN number. Around 12% of respondents said that they did not know how it worked. Less than 3 in 10 respondents (27%) claimed to have ever used the blocking facility; this figure increased among those with children in the home (35%).

Television advertising

Awareness of promotional messages

The survey asked respondents whether they were aware of three different forms of promotional messages, other than advertisements:

1. Programme sponsorship
2. Trailers or promotions for particular programmes
3. Trailers or promotions for particular television channels.

Table A4.18 details the 2008 survey responses. In 2008, awareness of all three types of promotional messages was high (at least three-quarters were aware of each), with slightly lower levels citing awareness of channel promotions. Those in multichannel homes had greater awareness of all three types of message, compared to those in analogue terrestrial-only homes.

Table A4.18

	Awareness of three types of promotional message						
	Total	Age				Channel reception	
		15-24 %	25-44 %	45-64 %	65+ %	Terrestrial only %	Multi-channel %
Base: All respondents	1987	344	720	614	306	300	1687
Programme sponsorship	87	83	88	91	83	78	89
Programme trailers	84	81	85	86	82	72	86
Channel promotions	76	74	76	78	73	60	78

*Don't knows' and 'None of these' not shown *(Q: 'Which of the following are you aware of on television?')

Table A4.19 shows the awareness of the three types of promotional messages over time.

Table A4.19

	Awareness of three types of promotional message						
	2002 %	2003 %	2004 %	2005 %	2006 %	2007 %	2008 %
Base: All respondents	1191	1186	1034	1441	1470	1433	1987
Programme sponsorship	91	89	78	78	73	80	87
Programme trailers	75	72	79	79	75	82	84
Channel promotions	62	56	71	71	65	76	76

*Don't knows' and 'None of these' not shown *(Q: 'Which of the following are you aware of on television?')

Attitudes towards advertising

The survey asked respondents a series of attitude statements about advertising with a four-point scale ranging from 'frequently' to 'never': *'How often, if at all, do you find advertisements on television...'*

- Are **informative** about products or issues?
- **Interfere** with your enjoyment of programmes?
- Are **truthful**?
- Are **clever**?
- **Encourage** negative or harmful **stereotypes**?
- **Sound too loud**?
- **Give you something to talk about**?
- Are **embarrassing**?
- **Show undesirable** behaviour that children might copy?
- Are **well produced**?

The words in **bold** are used as abbreviations in Table A4.20 – a summary of responses by those who said 'frequently' or 'sometimes'. Respondents could answer on a four-point scale from 'frequently' to 'never', as well as a 'don't know' option.

The top two mentions in 2008 were that advertisements '*interfere with the enjoyment of programmes*', mentioned by 4 in 5 (80%) of all respondents, and that advertisements were frequently or sometimes '*clever*' (79%). The majority of respondents felt that advertisements were frequently or sometimes '*well produced*', mentioned by about 3 in every 4 (76%).

Table A4.20

General attitudes to television advertising					
Frequently or sometimes find advertisements . . .					
	2004	2005	2006	2007	2008
Base: All respondents	2070	1441	1470	1433	1987
	%	%	%	%	%
Informative	65	66	68	63	69
Interfere	77	78	79	81	80
Truthful	60	59	63	59	63
Clever	79	77	78	77	79
Stereotypes	54	60	57	57	45
Too loud	63	63	66	68	61
Talk about	54	53	53	51	50
Embarrassing	30	36	32	29	24
Undesirable	67	69	65	64	51
Well produced	n/a	80	80	82	76

*(Q: 'How often, if at all, do you find advertisements on television are.....?')

Levels of television advertising

Respondents were asked what they thought about the current levels of advertising: *'Bearing in mind that advertising provides the money to pay for programmes on ITV1, Channel 4 and Five, which of these statements best describes how you feel about the amount of advertising on these channels?'* Table A4.21 shows the responses by respondents with different television platforms. Overall, 36% of all respondents said that there was already more advertising than they were happy with. Most respondents (44%) though, claimed that they were happy with the current levels but would not want them to increase. Only 7% claimed that advertising levels could go up a little more before it bothered them.

Freeview-only respondents were more likely to state that current levels were already too much – 41%, compared to 36% of satellite/cable respondents and 26% of analogue terrestrial-only respondents. The proportions who stated that it would be acceptable if levels of advertising on ITV1, Channel 4 and Five went up was low across all groups.

Table A4.21

	Attitudes to amount of advertising on terrestrial channels			
	Total	Analogue terrestrial only	Satellite or Cable	Freeview only
Base	1987	300	1080	588
	%	%	%	%
More would be acceptable	7	7	8	5
Current amount acceptable	44	37	45	46
Too much already	36	26	36	41

* Don't knows and not bothered not shown *(Q: 'Bearing in mind that advertising provides the money to pay for programmes on ITV1, Channel 4 and Five, which of these statements best describes how you feel about the amount of advertising on these channels?')

Table A4.22 below shows the responses given by viewers with satellite or cable television, on the levels of advertising on satellite, cable and digital channels.

Similar proportions of all those with satellite or cable television feel that current levels of advertising on these channels are acceptable (42%) or that there is already too much advertising on non-terrestrial channels (40%). Just 7% stated that a little more advertising on non-terrestrial channels would be acceptable.

Table A4.22

	Advertising on other (non-terrestrial) channels					
	2003	2004	2005	2006	2007	2008
Base: All with satellite or cable TV	601	658	682	708	711	1080
	%	%	%	%	%	%
More would be acceptable	15	14	11	11	13	7
Current amount acceptable	46	38	37	32	31	42
Too much already	35	42	46	45	46	40

*Don't knows and not bothered not shown *(Q: 'which of these statements best describes how you feel about the amount of advertising on satellite, cable and digital channels?')

Misleading and offensive advertisements

All respondents were also asked whether they had ever found advertisements to be misleading. They could answer *'frequently'*, *'sometimes'*, *'rarely'*, *'never'* or *'don't know'*. Table A4.23 details the responses. Just over a quarter (26%) said that they frequently or sometimes found advertisements misleading.

Table A4.23

Frequency of encountering misleading advertisements on television					
	2004	2005	2006	2007	2008
Base: All respondents	2070	1441	1470	1433	1987
	%	%	%	%	%
Frequently	9	7	6	8	6
Sometimes	30	29	31	28	20
Rarely	19	19	20	19	10
Never	38	39	36	40	53

*Don't knows not shown *(Q: 'How often if at all have you found that advertisements on television give you an impression of products or services which you later found to be wrong or misleading?')

Respondents were more likely to have *'frequently'* or *'sometimes'* encountered a misleading advert compared with one that had offended them (Table A4.24), as 15% said that they frequently or sometimes found advertisements offensive. Younger respondents were more likely to say that they had never been offended by advertisements on television – 77% of 15-24s reported they had never been offended, compared with 62% of respondents aged 65 and over.

Table A4.24

Frequency of encountering offensive advertisements on television					
	2004	2005	2006	2007	2008
Base: All respondents	2070	1441	1470	1433	1987
	%	%	%	%	%
Frequently	3	4	3	2	2
Sometimes	20	25	22	18	13
Rarely	33	29	31	30	18
Never	44	41	42	49	65

*(Q: 'How often if ever have you found advertisements on television to be offensive?')

Those respondents who had experienced an offensive advertisement were asked whether they thought that there was a time of day when the advertisement that offended them would be more acceptable. The majority, 52% said no, while 40% said yes. The respondents who felt that the advert(s) which had offended them would be more acceptable if shown at a different time were then asked when that time should be, and the most popular response was *'after 9pm'* (36%).