

PSB Annual Research Report 2016

PSB Audience opinions annex

Published July 2016

Note: This annex was reissued on 6 April 2017. It corrects the incorrect data in the statement “It shows high-quality soaps or dramas made in the UK” on delivery for each of the individual BBC channels.

Contents

	Page
• Background	2
• Overview of PSB television	7
• Overall satisfaction with PSB	21
• Nations and regions news	31
• Children's PSB	39
• Individual PSB channel summaries	45
• PSB website use and online viewing	54
• Demographics	60

Background



PSB tracker overview

- Based on the public service purposes presented in the 2003 Communications Act, Ofcom developed a range of PSB purposes and characteristics in its first PSB review in 2005*. The PSB channels (BBC One, BBC Two, BBC Three, BBC Four, ITV1, Channel 4, Channel 5, BBC News, S4C and BBC Alba) are expected together to fulfil the purposes and characteristics, although it is also acknowledged that each PSB channel has a specific remit.
- The PSB Tracker asks respondents to rate specific TV channels on each of the PSB purposes and characteristics relevant to that channel.
- The PSB purposes and characteristics were put into everyday language for the PSB Tracker survey, which asked respondents to give their opinions on the PSB statements, both in terms of the importance of these and the delivery of these by the PSB channels (see next slides).
- Regular viewers of each channel were asked to rate the 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.
- Note: The survey reports the opinions of (self-defined) regular viewers of each PSB channel, on the delivery of PSB purposes and characteristics. 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 involves.
- Both regular and occasional viewers of each channel were also asked to rate the delivery of the purposes and characteristics when thinking about the PSB channels as a whole.
- All respondents were also asked to rate how important it is that the PSB channels together fulfil the PSB purposes and characteristics, again using a 10-point scale.
- Respondents were asked to rate each channel, all channels combined, and importance for the first statement, and then rate them for the second statement, etc.
- The order of statements and channels within each section was rotated to prevent order bias.

*<http://stakeholders.ofcom.org.uk/broadcasting/reviews-investigations/public-service-broadcasting/psb-review-1/>

PSB tracker survey 2011-2014

- It is important to note that in 2011 (and again in 2015, see next slide) Ofcom changed the methodology for the tracker:
 - A change in sample size from approximately 7000 telephone interviews per year, to 3000
 - Fieldwork moved to continuous research throughout the year, rather than quarterly interviewing
 - An increase in the number of quotas:
 - The profile of individual quotas was also updated.
- A streamlining of the questionnaire length by focusing on essential questions:
 - Opinions of non-PSB digital channels were removed from the questionnaire
 - A range of questions relating to the importance and delivery of PSB content online were removed
 - However, respondents still rated overall opinion of the individual BBC and Channel 4 websites
 - A change in the number of PSB purposes and characteristics statements against which the PSB channels are measured, which resulted in a reduction from 20 to 13
 - Some of the statements were modified (see methodology document for details)
 - Moved to a 'purer' way of measuring self-defined 'regular viewers'
 - Overall reduction in interview length from 25 to 20 minutes.
- Fieldwork was conducted by BDRC Continental.

PSB tracker survey 2015 – methodology change

- In 2015 Ofcom changed the methodology for the tracker:
 - Until 2014, the PSB tracker was conducted via a telephone (CATI) methodology. In 2015 the decision was made to transition it to a dual method with online and CAPI face-to-face (F2F) data collection
 - The sample was split 75% online / 25% F2F, with proportional quotas applied to each method
 - A smaller sample of telephone interviews (CATI) were also conducted in 2015 using the previous methodology to enable recalibration and reporting of historic (pre 2015) data.
 - A discriminant analysis was conducted to establish the best weighting regime for the combined online and F2F data, to ensure it was representative. (please see Annex E for more information)
 - Fieldwork moved to two discrete waves, rather than continuous research throughout the year
- The questionnaire was streamlined by focusing on essential questions:
 - A number of channels were dropped from the Children's viewing section
 - BBC News, BBC Alba and S4C were dropped from the questions on regularity and frequency of viewing
 - Channel 5 was dropped from the question on individual channel ratings
 - A question on usage of www.s4c.co.uk was removed
 - Separate questions on incidence and frequency of using each catch-up service were combined into one question.
 - The question on ethnicity was changed to align with that used in the census, separating it into two questions: one on national identity and a second for ethnic group.
 - Overall reduction in interview length from 20 to 15 minutes.
- Fieldwork was conducted by BDRC Continental.

PSB tracker survey 2015 – Overtime changes

- So that historic results could be reported, they were calibrated to be comparable with the 2015 data collection method and results.
- Throughout this document, only statistically significant differences will be reported within the text and also highlighted on the charts. Reported differences between survey figures are statistically significant at the 95% level to accommodate the impact of sample design and weighting. This means that there is a high level of confidence that any reported differences reflect a true attitudinal or behavioural change rather than being caused by a change in sample methodology or profile.
- Due to the re-weighting of historic data, statistically significant differences for results before 2014 are not shown. Changes since 2014 are marked as statistically significant if both the re-weighted data from 2014 and the 2015 data, and the previously published 2014 and a parallel run of telephone interviews (CATI) in 2015 are all significant at the 95% level.

Overview of PSB television



Overview of PSB

This section gives a broad overview of claimed regular viewing among the UK population and the importance and delivery of all the PSB purposes and characteristics. All respondents claiming to watch at least one PSB channel regularly were asked to rate the importance of the characteristics and purposes. Respondents claiming to watch any of the PSB channels were asked to rate how well the channels delivered on the purposes and characteristics of PSB. They were also asked how well individual PSB channels delivered on the purposes and characteristics of the specific channel (see figures 32-37 for more information).

Importance

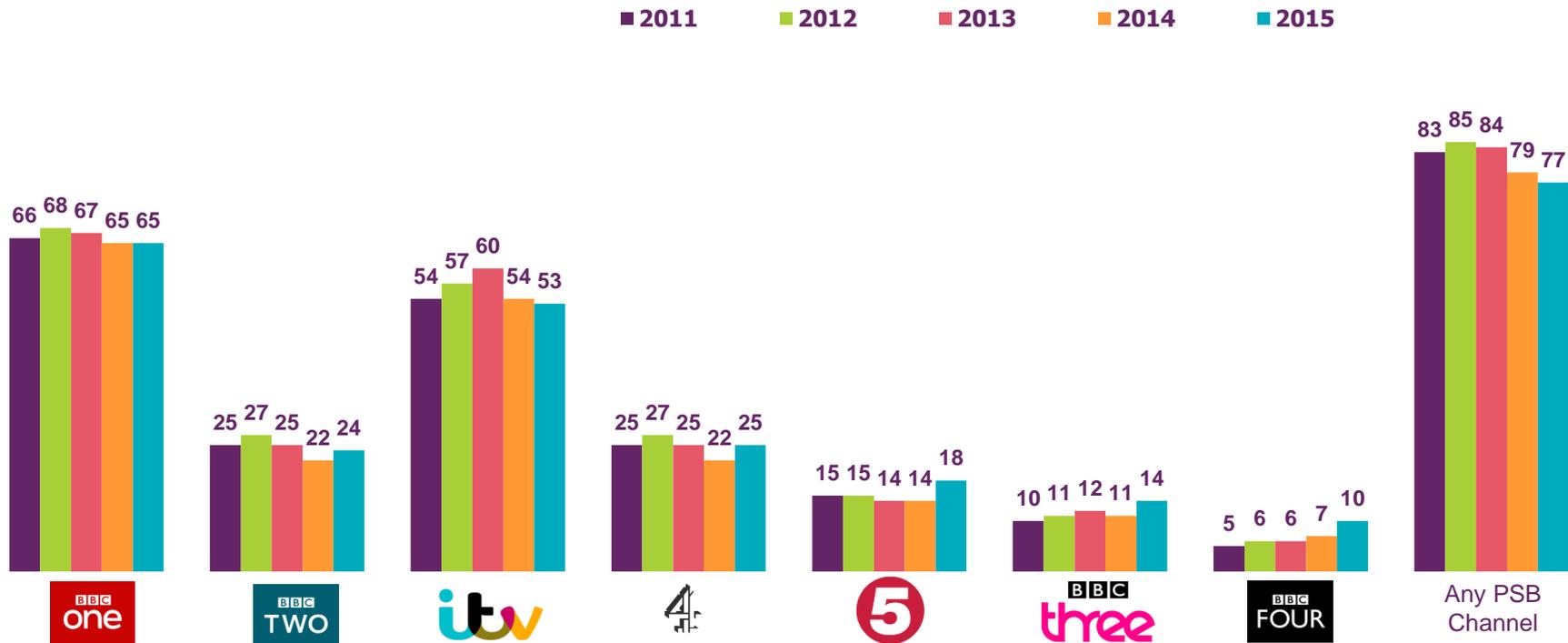
- The single most important Purpose was Purpose 1 – ‘Informing our understanding of the world’, with all 3 statements scoring higher than those for any other Purpose. Results for this Purpose ranged from 81% up to 86% (for *‘Its news programmes are trustworthy’*).
- Purposes 3 and 4 had the least important statements, with 69% rating *‘It shows high quality soaps or dramas made in the UK’* (from Purpose 3) and *‘Its programmes show different kinds of cultures within the UK’* (from Purpose 4) as important.
- The most important statement from Purpose 3 was *‘It portrays my region/Scotland/Wales/Northern Ireland fairly to the rest of the UK’*, which scored 79%.
- Respondent perception of the importance of Characteristics varied, from 86% (for *‘It shows well-made, high-quality programmes’*) to 63% (for *‘The style of program is different to what I’d expect to see on other channels’*).

Delivery

- As per the ratings for importance, the highest ratings for delivery were for Purpose 1. *‘Its programmes help me understand what’s going on in the world today’* (74%) was significantly higher than the other Purpose 1 statements (both 70%).
- All but one of the Purposes scored significantly higher for importance than delivery for PSB channels combined. The largest difference was for responses to *‘It portrays my region/ Scotland/ Northern Ireland/ Wales fairly to the rest of the UK’* (79% to 56%). The one measure that wasn’t significantly higher was *‘It shows high quality soaps/dramas made in the UK’*.
- There was a similar trend for Characteristics, with importance scoring higher than delivery for all measures. This is most visible for the statements *‘It shows programmes with new ideas and different approaches’* (76% to 61%) and *‘It shows new programmes made in the UK’* (80% to 65%).



Fig 1 Proportion of UK sample that are self-claimed regular viewers



Base: All respondents (3109, 3025, 3028, 3158, 3653)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.



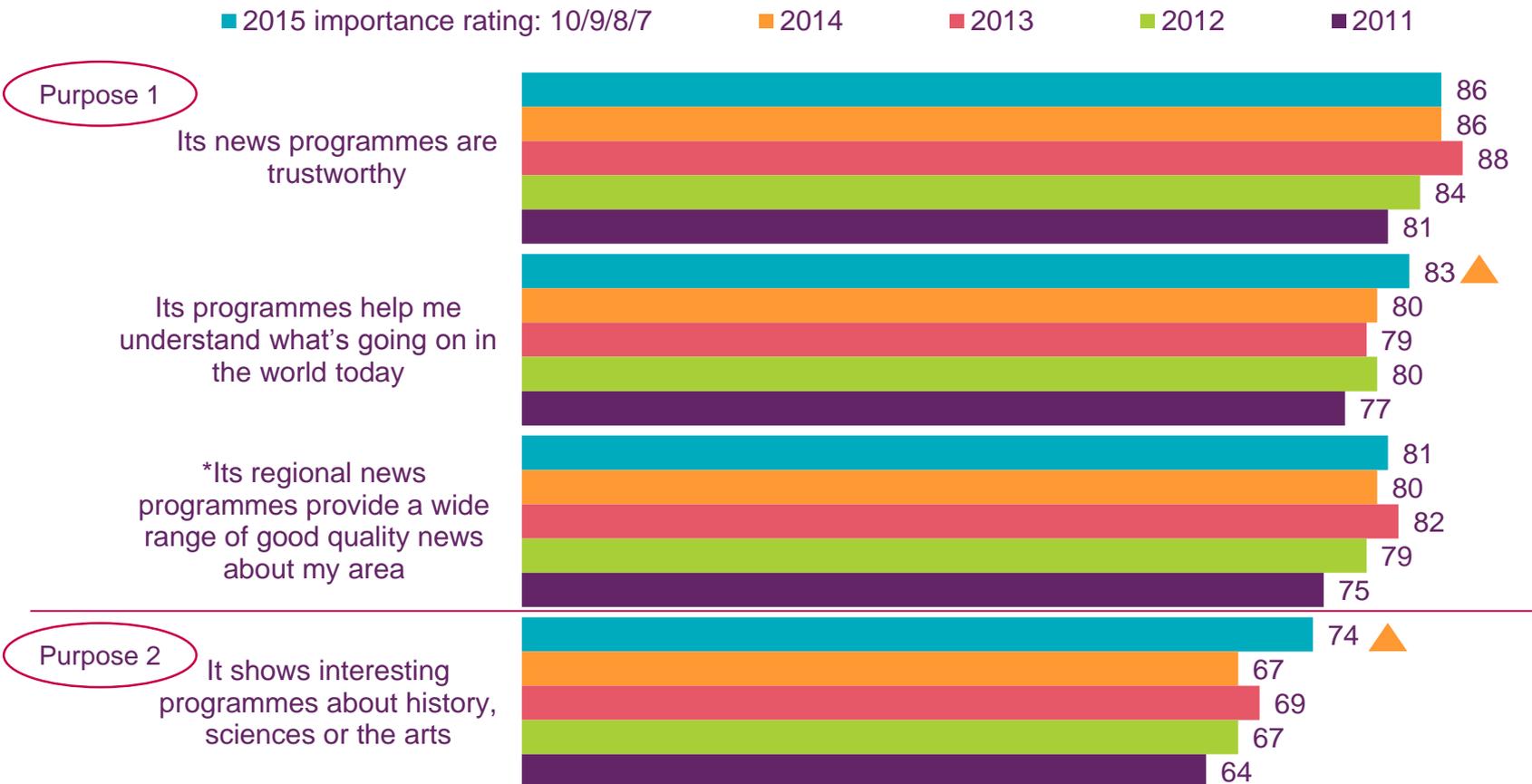
Fig 2 Proportion of sample that are self-claimed regular viewers of each channel, within subgroups

Total regular viewers (% of Total)	65	24	53	25	18	14	10	77
Male	63	27	47	23	15	14	10	73
Female	66	20	58	28	20	13	10	81
16-24	47	17	41	27	13	26	9	69
25-34	54	13	48	31	22	20	10	72
35-44	59	16	50	26	17	13	9	70
45-54	70	21	57	28	19	10	11	79
55-64	72	34	57	24	19	10	12	82
65+	80	38	61	18	16	6	10	86
AB	68	36	43	25	13	13	13	76
C1C2	63	21	52	26	19	15	10	75
DE	65	18	62	25	20	12	8	80
England	64	24	52	26	18	14	10	76
Scotland	65	17	53	21	18	9	7	78
Wales	68	25	53	20	19	14	10	79
N Ireland	70	29	64	31	17	11	10	80
White	65	24	55	25	18	13	10	78
MEG	60	20	36	27	14	19	10	71

Base: All respondents in each demographic group



Fig 3 The importance of PSB purposes 1 and 2



▲ = 95% statistically significant increase from 2014 to 2015

Extent to which the characteristics is important, where 10 means 'extremely important' and 1 means 'not at all important'

Base: All respondents (2011 = 3109, 2012 = 3025, 2013 = 3028, 2014 = 3158, 2015 = 3653)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.



Fig 4 The importance of PSB purposes 3 and 4

■ 2015 Importance rating: 10/9/8/7 ■ 2014 ■ 2013 ■ 2012 ■ 2011

Purpose 3



Purpose 4

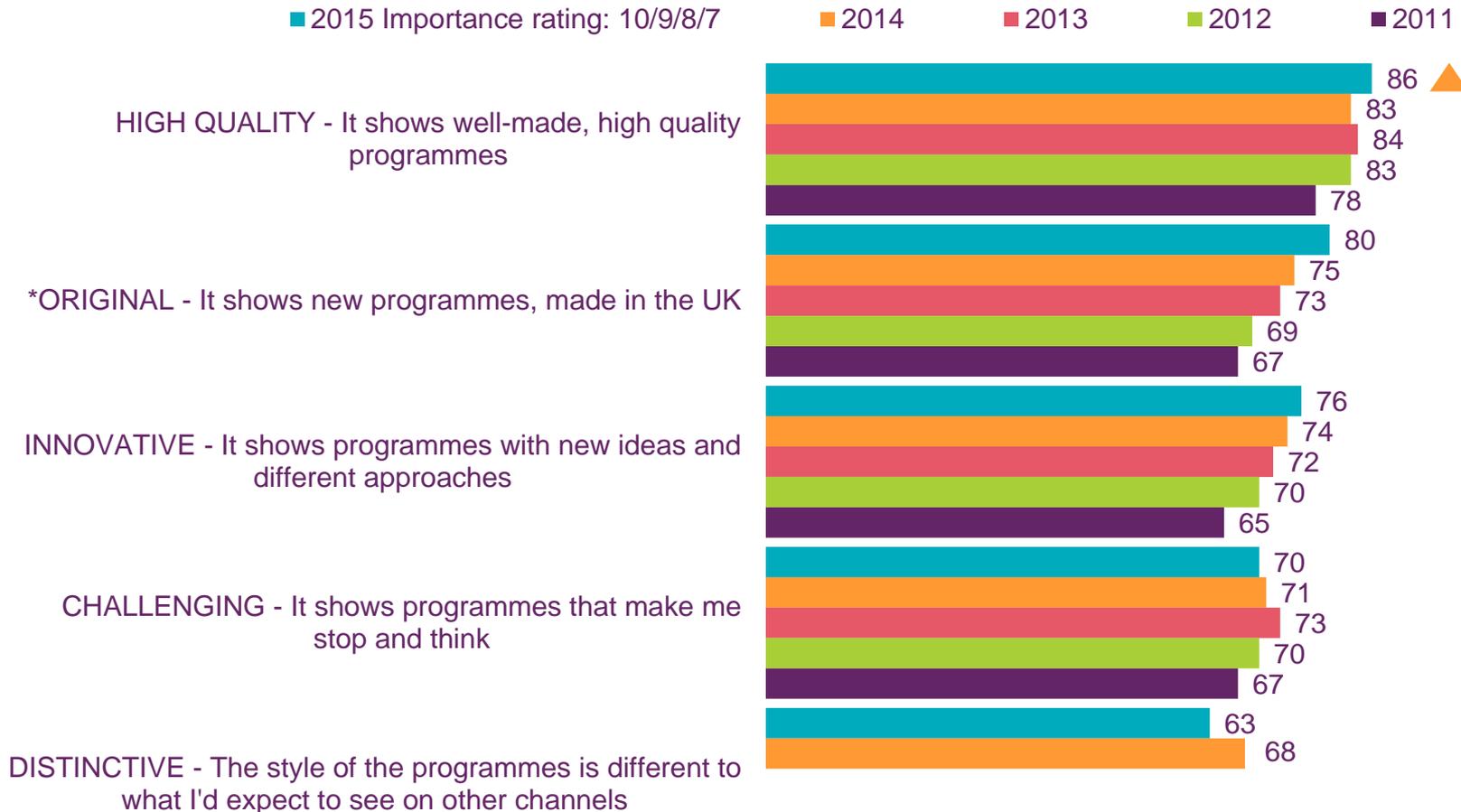


Extent to which the characteristics is important, where 10 means 'extremely important' and 1 means 'not at all important'

Base: All respondents (2011 = 3109, 2012 = 3025, 2013 = 3028, 2014 = 3158, 2015 = 3653)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 5 The importance of PSB characteristics



▲ = 95% statistically significant increase from 2014 to 2015

Extent to which the characteristics is important, where 10 means "extremely important" and 1 means "not at all important"

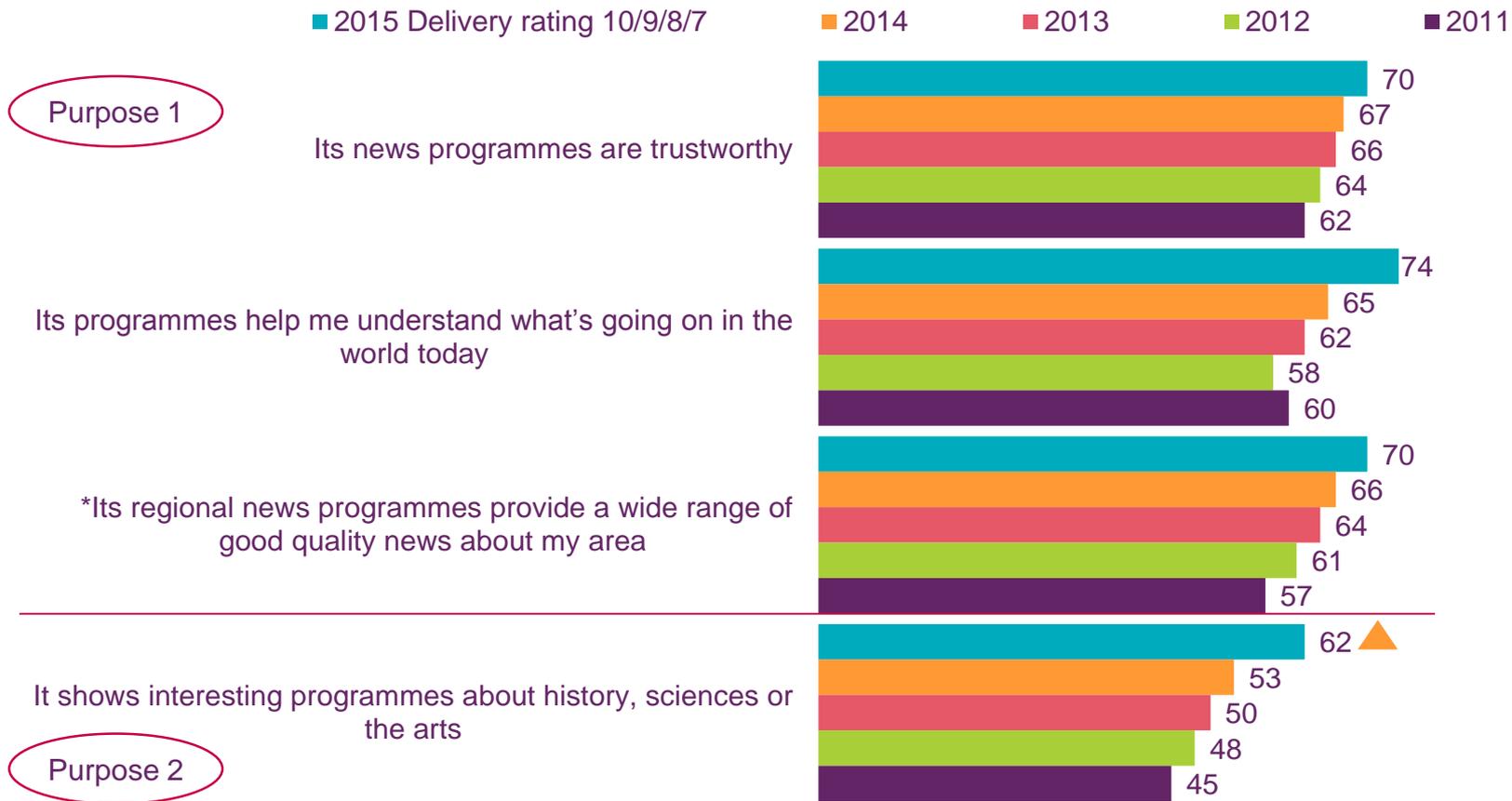
Base: All respondents (2011 = 3109, 2012 = 3025, 2013 = 3028, 2014 = 3158, 2015 = 3653)

*NB: Before 2011 the second statement from the top asked as: 'It shows *enough* new programmes made in the UK'.

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.



Fig 6 The delivery of PSB purposes 1 and 2



▲ = 95% statistically significant increase from 2014 to 2015

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 watch any PSB channels regularly or occasionally. All Channels Combined (2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3067, 2015 = 3606)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.



Fig 7 The delivery of PSB purposes 3 and 4

■ 2015 Delivery rating 10/9/8/7 ■ 2014 ■ 2013 ■ 2012 ■ 2011

Purpose 3

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



It portrays my region/Scotland/Wales/Northern Ireland fairly to the rest of the UK



*It shows high-quality comedy made in the UK



Purpose 4

Its programmes show different kinds of cultures within the UK



*It shows different parts of the UK, including England, Northern Ireland, Scotland and Wales



▲ = 95% statistically significant increase from 2014 to 2015

Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.

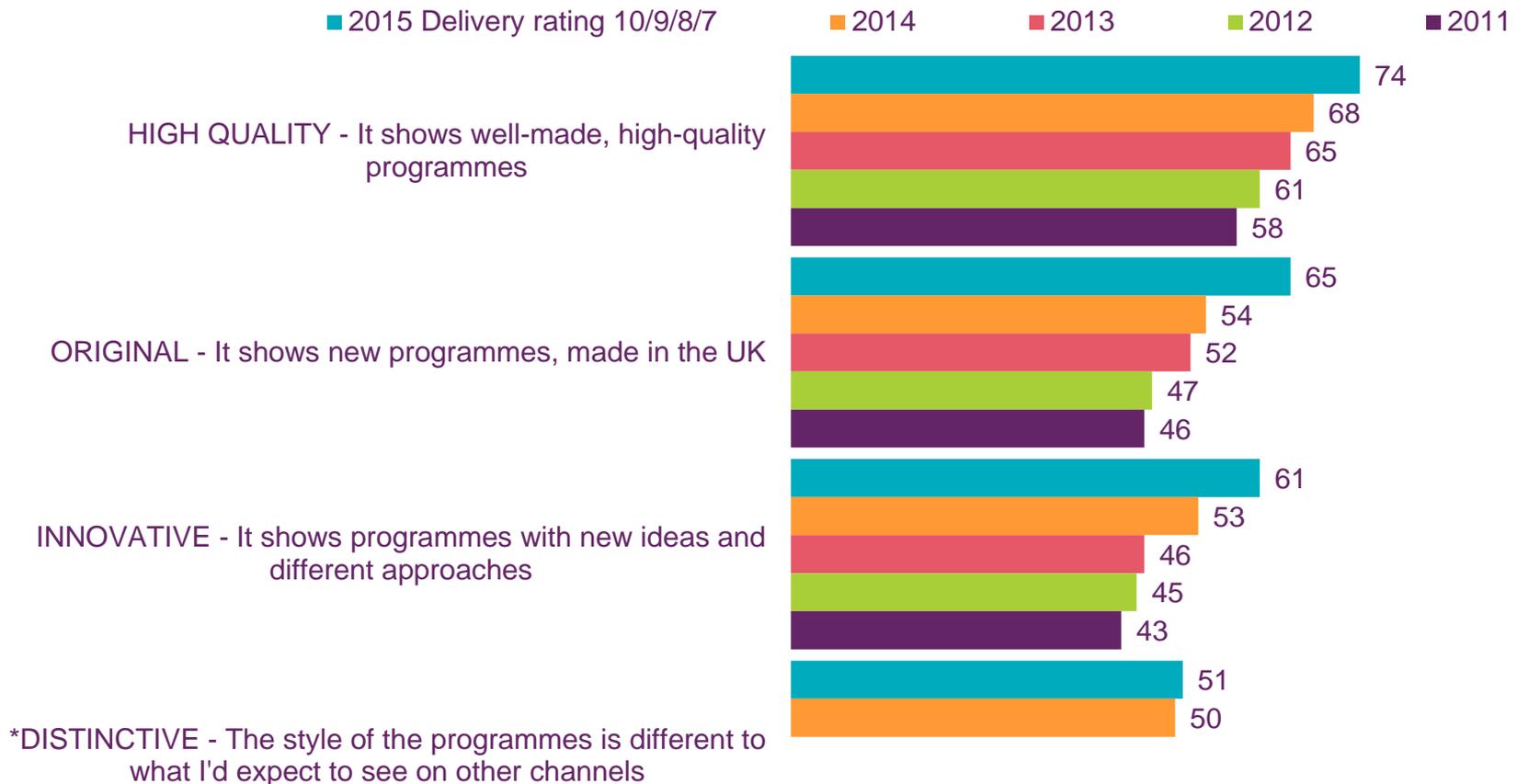
Base: All respondents who watch any PSB channels regularly or occasionally. All Channels Combined (2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3067, 2015 = 3606)

*Change to purpose wording in 2014

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.



Fig 8 The delivery of PSB characteristics



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 watch any PSB channels regularly or occasionally. All Channels Combined (2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3067, 2015 = 3606)

**'Distinctiveness' characteristic first asked in 2014

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 9: Importance/delivery of PSB purposes

Purpose	Statement	Metric	2011	2012	2013	2014	2015
Purpose One – Informing our understanding of the world	Its news programmes are trustworthy	Importance	81%	84%	88%	86%	86%
		Delivery	62%	64%	66%	67%	70%
	Its programmes help me understand what's going on in the world today	Importance	77%	80%	79%	80%	83% ↑
		Delivery	60%	58%	62%	65%	74%
	Its regional news programmes provide a wide range of good quality news about my area^	Importance	75%	79%	82%	80%	81%
		Delivery	57%	61%	64%	66%	70%
Purpose Two – Stimulating knowledge and learning	It shows interesting programmes about history, sciences or the arts	Importance	64%	67%	69%	67%	74% ↑
		Delivery	45%	48%	50%	53%	62% ↑
Purpose Three – Reflecting UK cultural identity	It portrays my region/Scotland/Northern Ireland/Wales fairly to the rest of the UK^	Importance	62%	67%	69%	67%	79%
		Delivery	41%	40%	44%	46%	56%
	It shows high quality soaps/dramas made in the UK	Importance	54%	59%	60%	63%	69%
		Delivery	48%	49%	53%	56%	66%
	It shows high quality comedy made in the UK	Importance	Not asked			66%	72%
		Delivery	Not asked			50%	59%
	It provides a wide range of high quality and UK made programmes for children*	Importance	79%	78%	85%	80%	88%
		Delivery	61%	61%	69%	74%	85%
Purpose Four – Representing diversity and alternative viewpoints	Its programmes show different kinds of cultures within the UK	Importance	57%	65%	64%	67%	69%
		Delivery	42%	44%	45%	51%	62% ↑
	It shows different parts of the UK including England, NI, Scotland and Wales	Importance	Not asked			66%	76%
		Delivery	Not asked			49%	66%

Summary % of respondents rating Importance/Delivery 10/9/8/7. Base for Importance: All (in 2015 n = 3653); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (in 2015 n = 3606). *All whose children regularly watch any of these channels (in 2015): Cbeebies, CBBC. Question amended since 2011 - previous wording: 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'; 'It portrays my region/Scotland/Northern Ireland/Wales well to the rest of the UK'

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

- ↑ Significantly higher than 2014
- ↓ Significantly lower than 2014

Fig 10: Importance and delivery of PSB characteristics 2008-2015

Characteristic	Statement	Metric	2011	2012	2013	2014	2015
High quality	It shows well made high quality programmes	Importance	78%	83%	84%	83%	86% ↑
		Delivery	58%	61%	65%	68%	74%
Challenging	It shows programmes that make me stop and think	Importance	67%	70%	73%	71%	70%
Original	It shows new programmes made in the UK**	Importance	67%	69%	73%	75%	80%
		Delivery	46%	47%	52%	54%	65%
Innovative	It shows programmes with new ideas and different approaches	Importance	65%	70%	72%	74%	76%
		Delivery	43%	45%	46%	53%	61%
Distinctiveness	The style of programmes is different to what I'd expect to see on other channels	Importance				68%	63%
		Delivery	Not asked			50%	51%

↑ Significantly higher than 2014

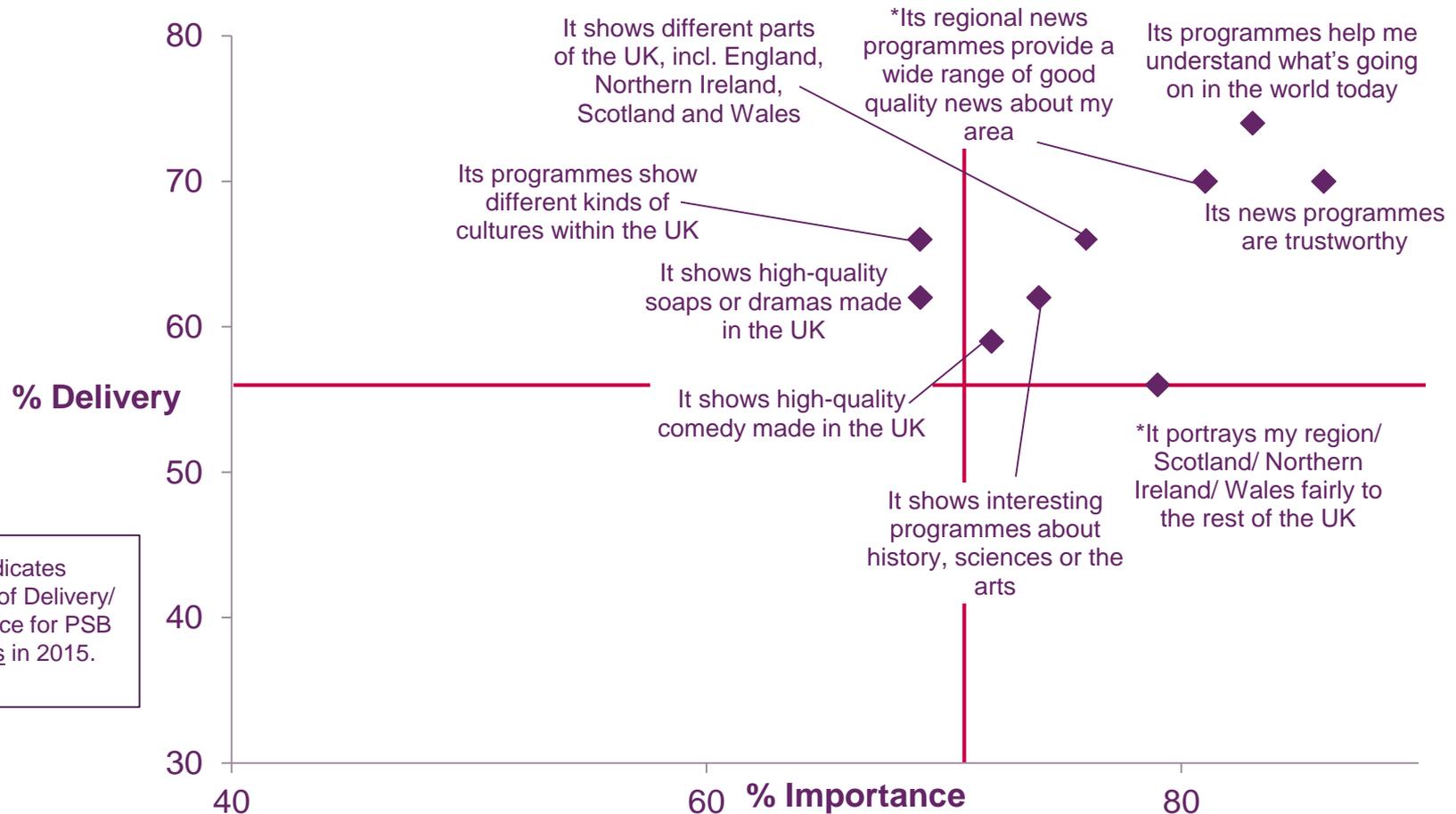
↓ Significantly lower than 2014

Source: PSB Tracker, 2008-2015, UK adults aged 16+. Summary % of respondents rating Importance/Delivery 10/9/8/7. **Slightly amended wording since 2011: previous wording: 'It shows *enough* new programmes, made in the UK'; Base for Importance: All (in 2015 n = 3653); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (in 2015 n = 3606)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.



Fig 11a Summary of the importance and delivery of PSB purposes 2015



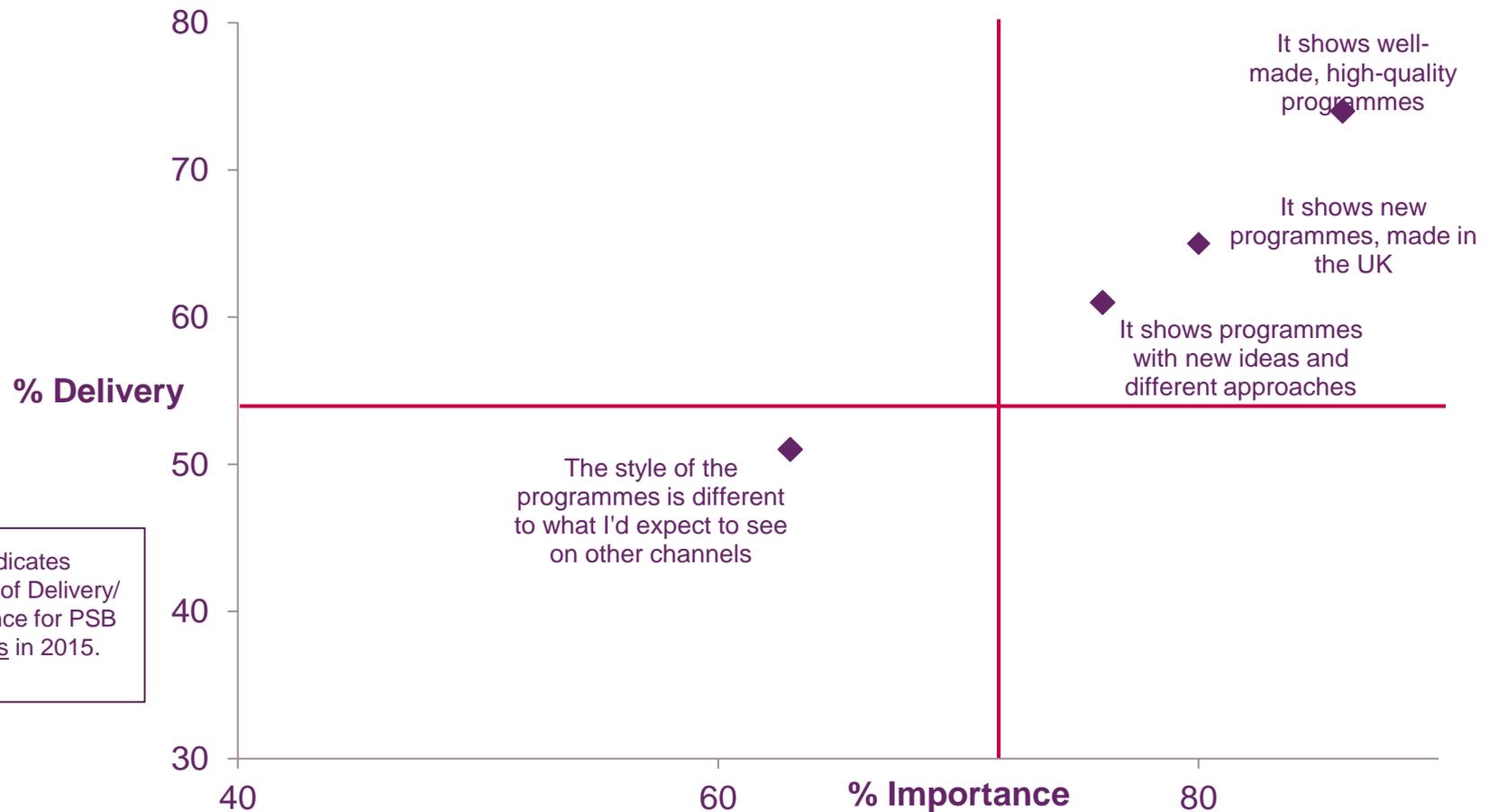
Summary % of respondents rating Importance/Delivery 10/9/8/7

Base for Importance: All (3653); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (3606)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.



Fig 12a Summary of the importance and delivery of PSB characteristics 2015



Summary % of respondents rating Importance/Delivery 10/9/8/7

Base for Importance: All (3653); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (3606)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Overall satisfaction with PSB

Overall satisfaction with PSB

Respondents are asked to rate how satisfied they are that all of the main PSB channels put together are providing the Purposes and Characteristics. This section looks at overall satisfaction among the total sample as well as split by the various demographic sub-groups and methods of watching TV.

Key themes

- Overall, 73% of those who ever watch any PSB channel claimed to be either quite or very satisfied with PSB broadcasting. Seven percent of viewers stated they were dissatisfied (unchanged from 2014).
- Of the 73% that were satisfied with PSB overall, 20% were very satisfied compared to 15% in 2014.
- There was no significant difference between age groups or socio-economic group.
- 12% said they were more satisfied with PSB compared to one year ago, and 15% said they were less satisfied. These proportions are in line with the levels recorded in 2014.
- By viewing platform, those using Online-only had the lowest satisfaction (61%), significantly lower than Cable/Satellite (74%).
- There was no difference in satisfaction between Freeview-only and those with Cable/Satellite.

Fig 13 Overall satisfaction with PSB over time

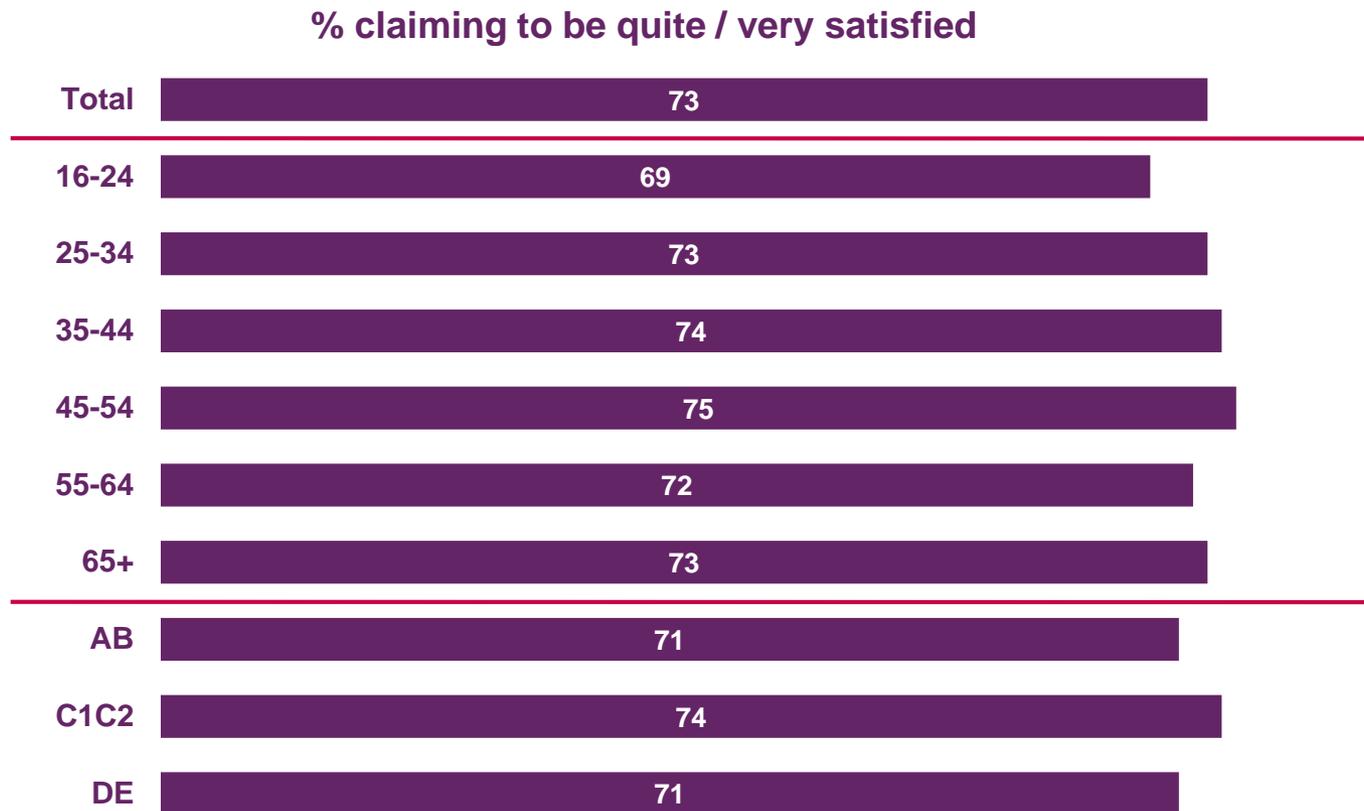


Q And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and Five - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All respondents who ever watch any PSB channel (2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3066, 2015 = 3606)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 14 Overall satisfaction with PSB by age and socio-economic group



Q And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and Five - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All who ever watch any PSB channels (3606)

16-24 (544); 25-34 (568); 35-44 (610); 45-54 (603); 55-64 (542); 65+ (739); AB (852); C1C2 (1827); DE (927)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 15 Overall satisfaction with PSB compared to one year ago



Q Thinking again about these channels combined, the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and Five do you think you are more satisfied, less satisfied or have the same satisfaction with these as a year ago?

Base: All who ever watch any PSB channels (3606)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 16 Reasons for declining overall satisfaction with PSB compared to one year ago

Among those who said they were less satisfied than a year ago, they were asked why they said this.

	All 2015	Change vs 2014 - pp
There are a lot of repeats	31%	-6%
I do not find them interesting/they are boring/rubbish	21%	-3%
Too much bad language	13%	+10%
Not enough new programmes	8%	+4%
They don't portray true to life/accurately	7%	+3%
Too many reality shows	6%	-3%
A lot of the programmes are all the same/similar	5%	-1%
Not enough regional/ local news	4%	+2%
Poor quality of programmes	3%	-7%

All other responses were below 3%.

Q *What makes you say this?*

Base: All less satisfied compared with last year (617)

Note Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.



Fig 17 Reasons for increasing overall satisfaction with PSB compared to one year ago

Among those who said they were more satisfied than a year ago, they were asked why they said this.

	All 2015	Change vs 2014 - pp
Better/more choice/variety of programmes	41%	+3%
Better quality of programmes	16%	+3%
Better dramas/films	10%	+1%
More channels are becoming appealing now	9%	+5%
More interesting programmes	5%	-2%
More interesting documentaries	4%	+1%
Programmes are more informative/have relevant information	3%	-5%
I'm just able to watch more TV now	3%	-3%

All other responses were below 3%.

Q *What makes you say this?*

Base: All more satisfied compared with last year (543)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 18 Overall satisfaction with PSB by viewing platform

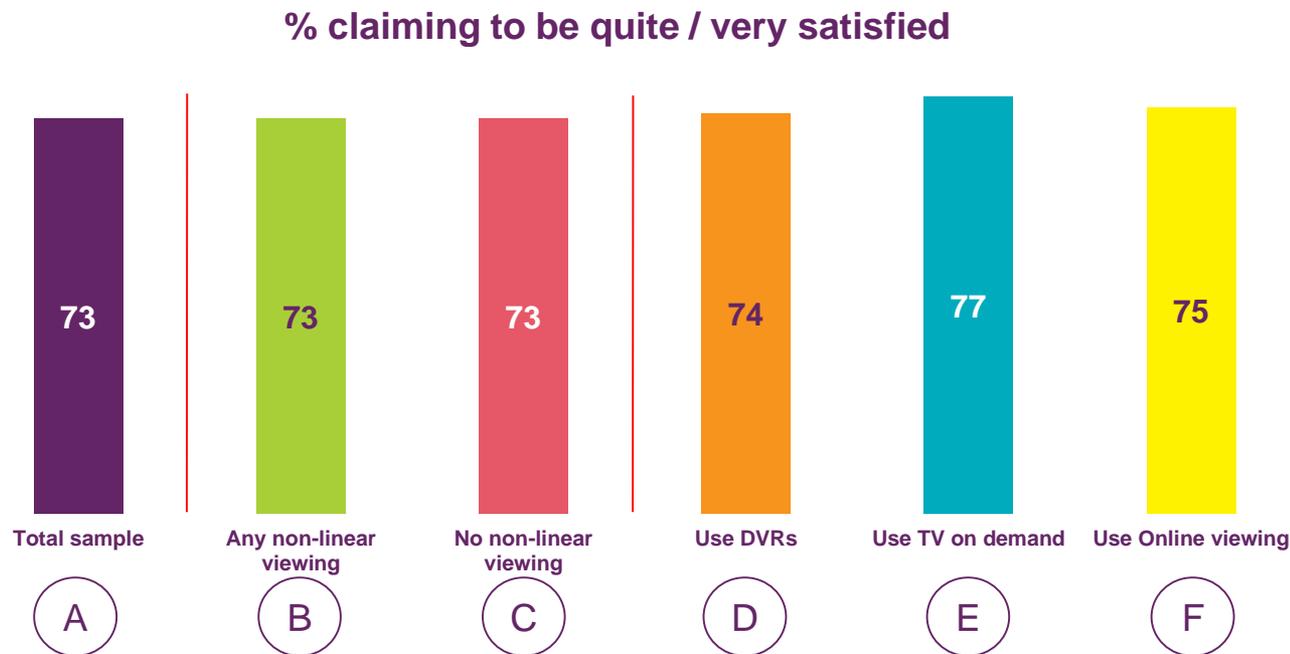


Q And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and Five - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All respondents who ever watch any PSB channels (3606); Freeview only (852); Cable/Satellite (2296); Use Online Viewing (216)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 19 Overall satisfaction with PSB by linear viewing and DVR usage



No significant differences between categories (99% level – A/B/C/D/E/F)

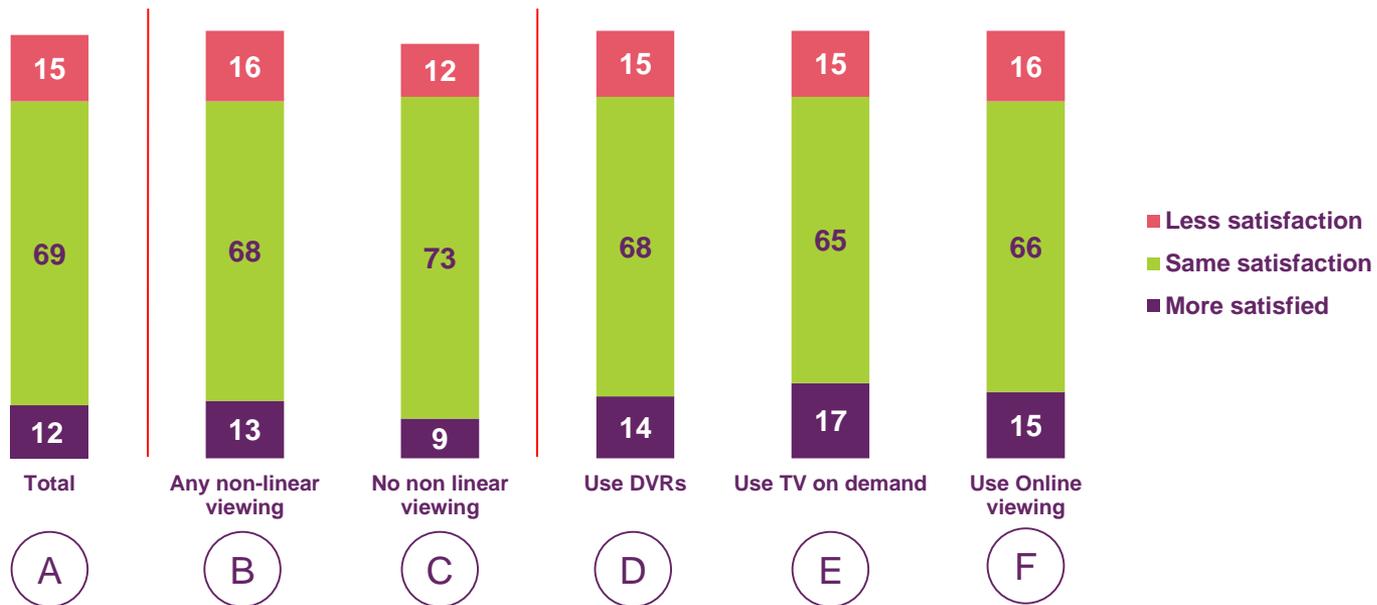
Q And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and Five - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All who ever watch any PSB channels: Total (3606), Any non-linear viewing (3222), No non-linear viewing (358), Use DVRs (2208), Use TV on demand (1323), Use Online viewing (1933)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 20 Overall satisfaction with PSB compared to one year ago by linear viewing and non linear viewing

% satisfaction compared to one year ago



No significant differences between categories (99% level – A/B/C/D/E/F)

Q Thinking again about these channels combined do you think you are more satisfied, less satisfied or have the same satisfaction with these as a year ago?

Base: All who ever watch any PSB channels: Total (3606), Any non-linear viewing (3222), No non-linear viewing (358), Use DVRs (2208), Use TV on demand (1323), Use Online viewing (1933)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

PSB nations and regions news

PSB nations/regions news

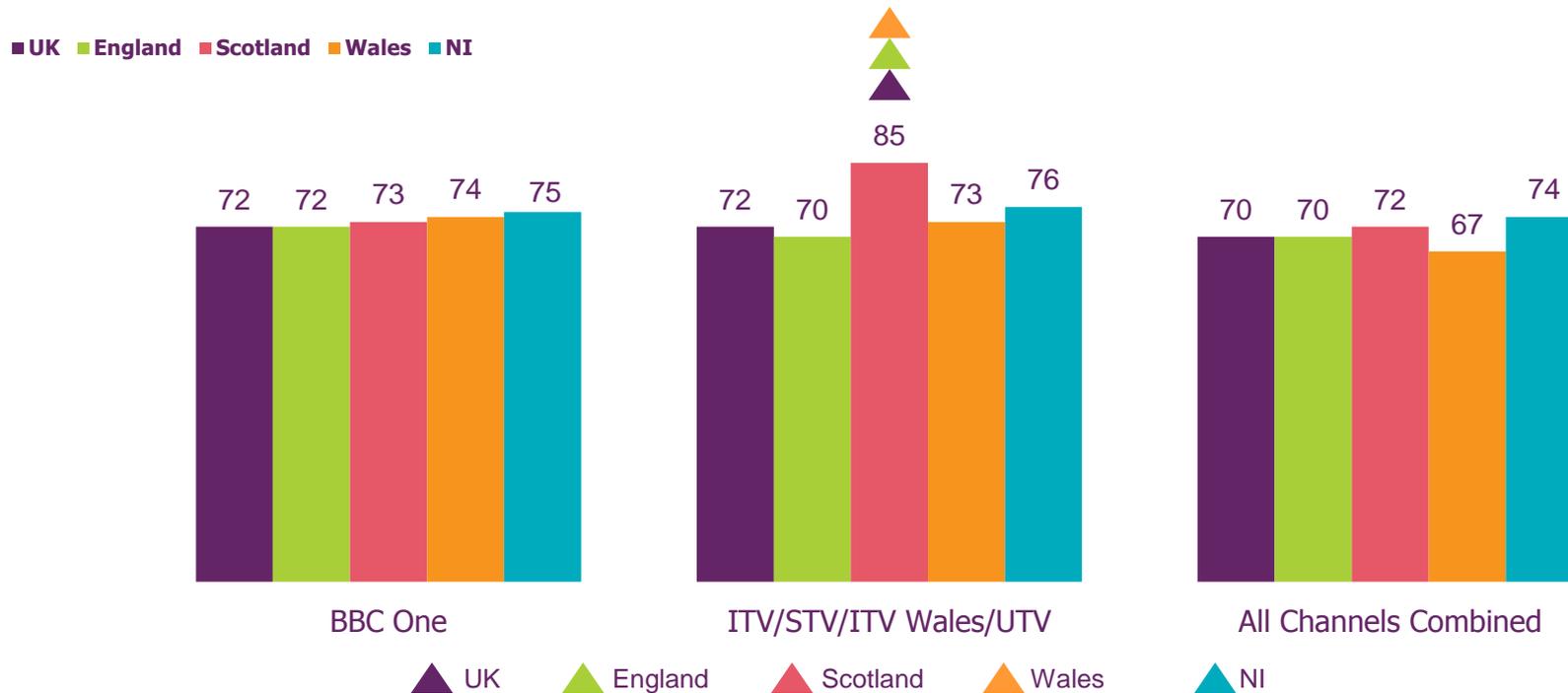
The focus of this section is opinion of PSB nations/regions news programming in the UK nations, which is reflected in the statement *'its regional news programmes provide a wide range of programmes about my area'*.

Key themes

- Views in the nations about the provision of nations/regions were largely consistent.
- All PSB channels combined
 - This was asked of all regular or occasional viewers of at least one PSB channel. There were no significant differences between nations/regions for rating of delivery of news by PSB channels combined.
- BBC One
 - Among regular viewers of BBC One, there were no significant differences between respondent rating of nations/regions for delivery for BBC One, with all ranging between 72% and 75%.
- ITV1
 - Among regular viewers of ITV1, 85% of respondents in Scotland rated STV highly (10/9/8/7 out of 10), significantly higher than ITV in the other nations/regions apart from Northern Ireland.
- Regional Portrayal
 - 61% of respondents in Scotland rated that their nation is fairly portrayed, significantly higher than 53% of respondents in Wales.

Fig 21 'Its regional news programmes provide a wide range of good quality news about my area' (2015 split by nation)

% Rating for delivery 10/9/8/7



Shows significant differences between nations for BBC One/ITV1/All channels combined at 99% level

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

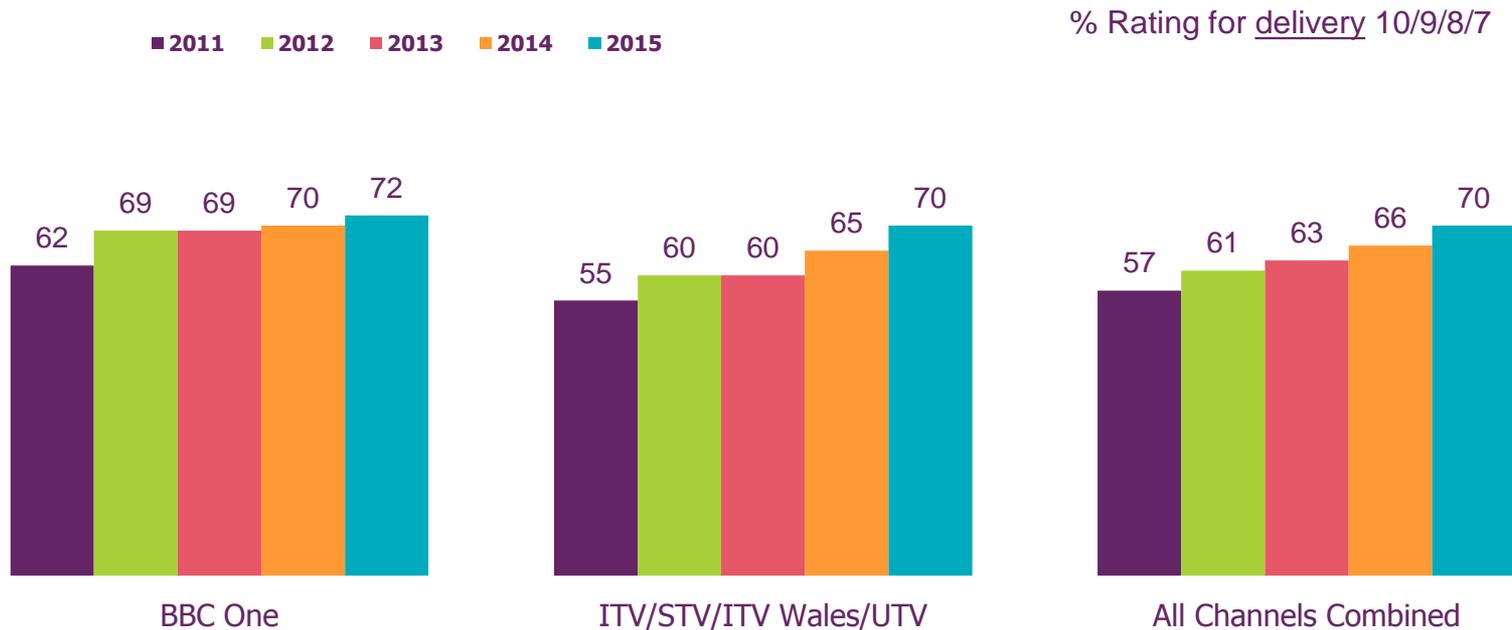
Base for individual channels: Self-reported regular viewers of each in each nation (BBC One = 2597, 1690, 384, 312, 211. ITV1 = 2025, 1312, 284, 236, 193)

Base for 'All channels combined': All watching BBC One or ITV, regularly or occasionally (3584, 2963, 547, 432, 298)

NB: Before 2011 the statement was asked as 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 23 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in England)

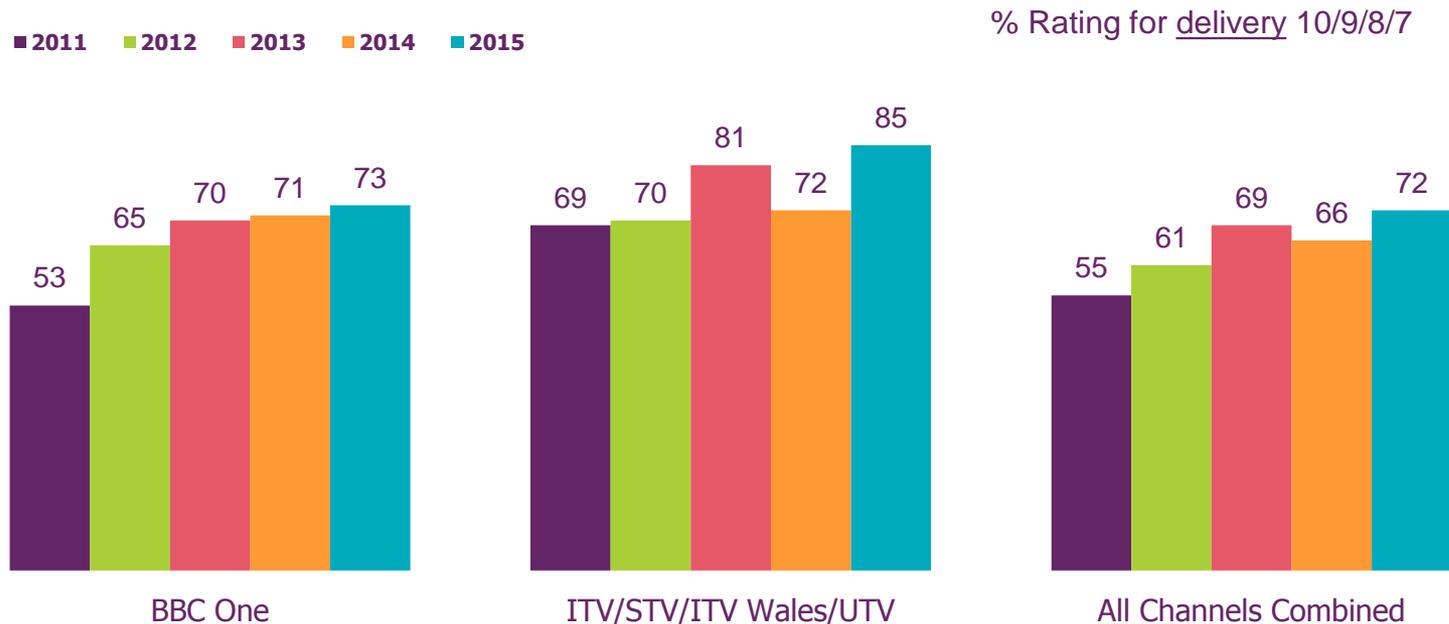


Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-reported regular viewers of each channel in England. (BBC One = 861, 887, 875, 859, 1690; ITV1 = 547, 577, 633, 581, 1312) Base for 'All channels combined': All respondents in England who watch BBC One or ITV, regularly or occasionally (1647, 1593, 1573, 1638, 2307)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 24 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in Scotland)



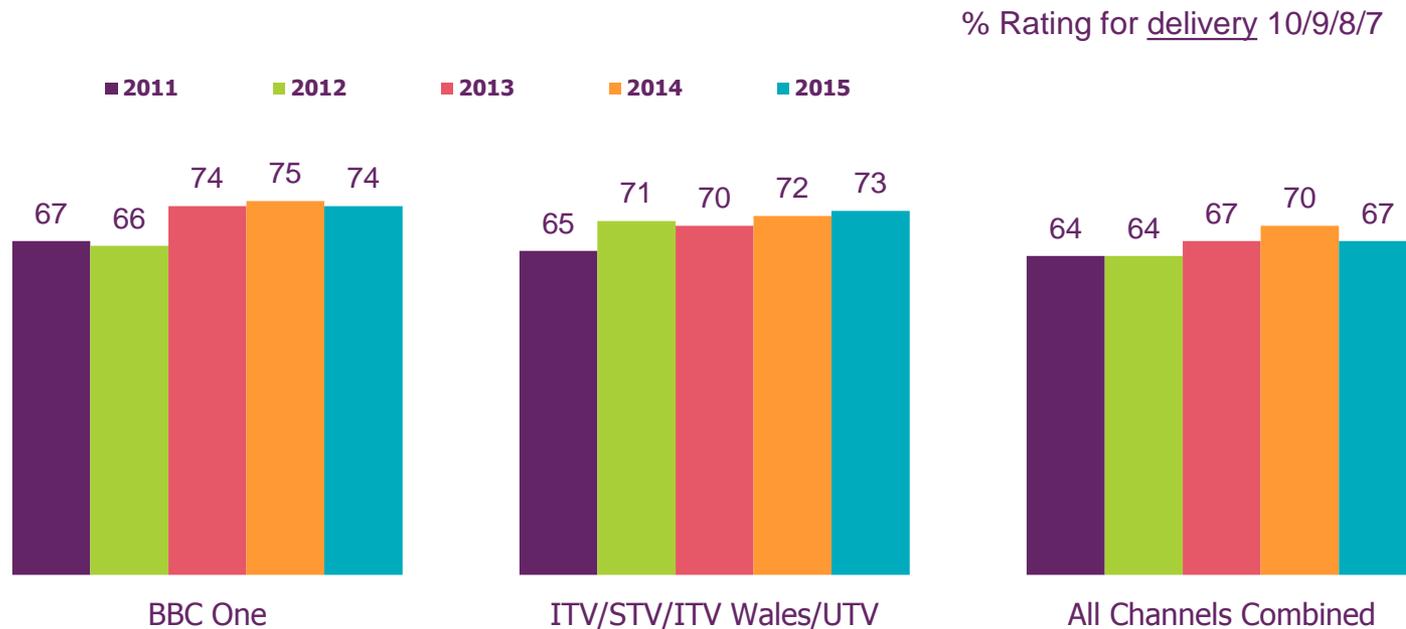
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-reported regular viewers of each channel in Scotland. (BBC One = 234, 289, 238, 240, 384; ITV1 = 189, 214, 200, 151, 284) Base for 'all channels combined': all respondents in Scotland who watch BBC One or ITV, regularly or occasionally (499, 493, 488, 510, 547)

NB: Before 2011 the statement was asked as 'its news programmes for people in Scotland provide a wide range of good quality news about Scotland'

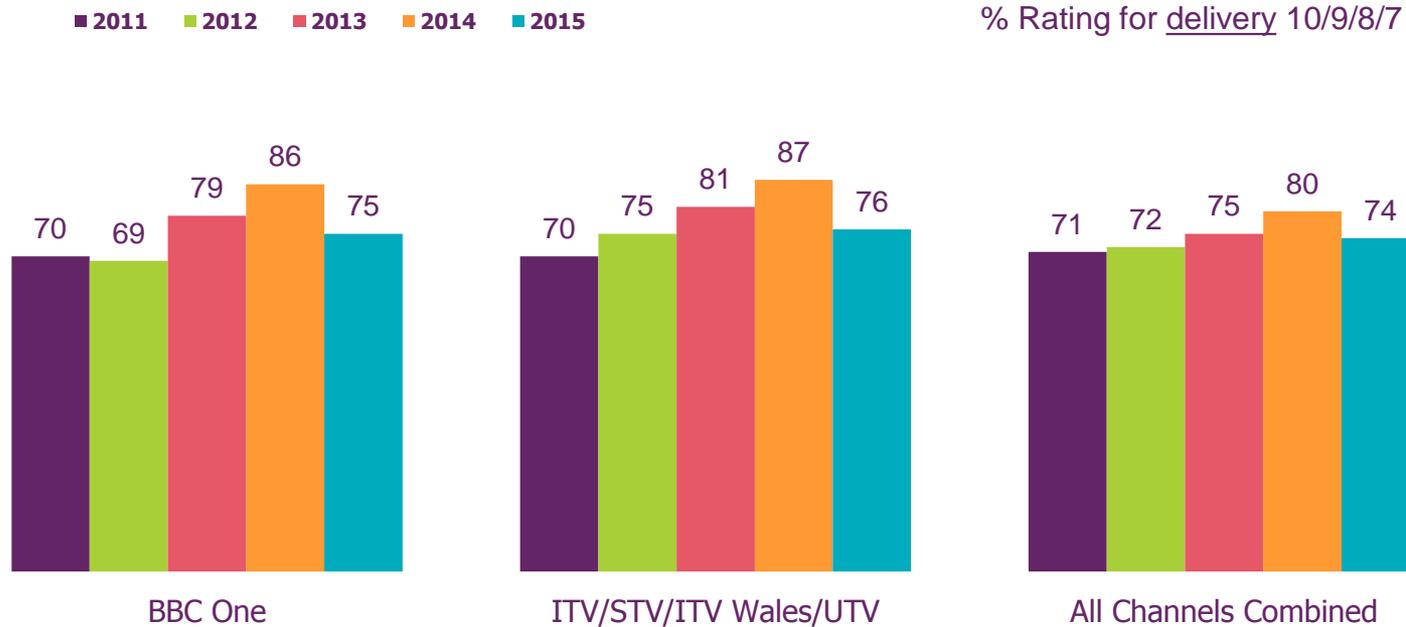
Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 25 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in 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 individual channels: Self-reported regular viewers of each channel in Wales. (BBC One = 268, 276, 235, 238, 312; ITV1 = 175, 191, 173, 147, 236) Base for 'all channels combined': All respondents in Wales who watch BBC One or ITV, regularly or occasionally (474, 447, 433, 457, 432)
 NB: Before 2011 the statement was asked as 'Its news programmes for people in Wales provide a wide range of good quality news about Wales'
 Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

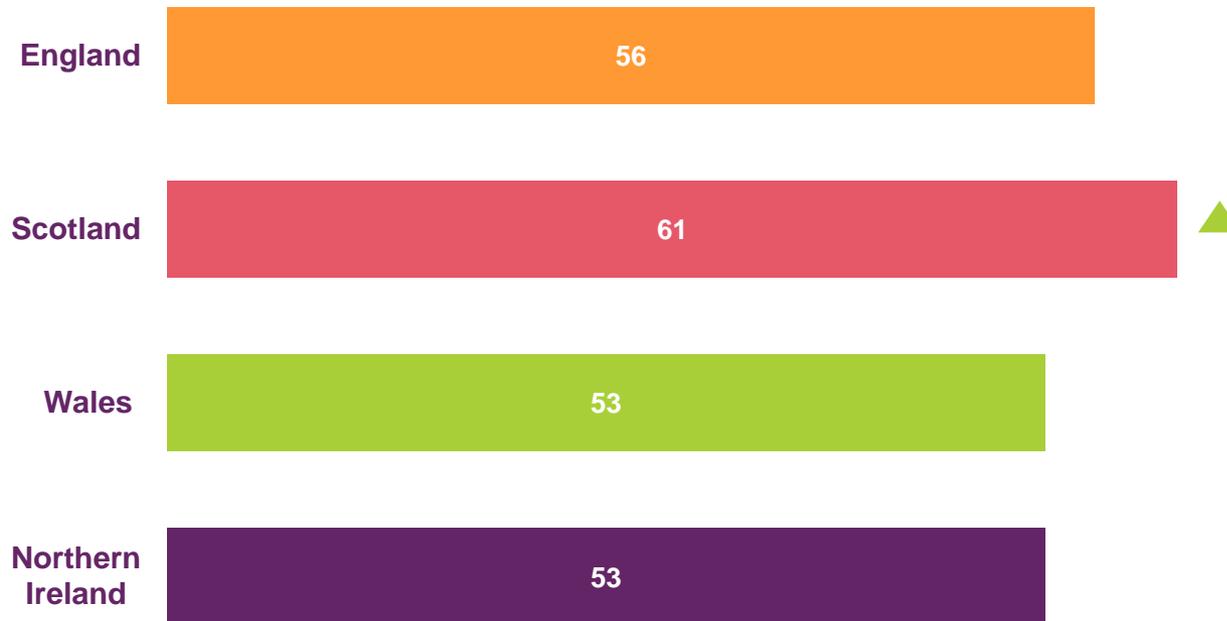
Fig 26 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in Northern Ireland)



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 individual channels: Self-reported regular viewers of each channel in Northern Ireland. (BBC One = 234, 231, 204, 233, 211; ITV1 = 196, 232, 229, 192, 193) Base for 'all channels combined': All respondents in Northern Ireland who watch BBC One or ITV, regularly or occasionally (459, 450, 432, 462, 298)
 NB: Before 2011 the statement was asked as 'Its news programmes for people in Northern Ireland provide a wide range of good quality news about Northern Ireland'
 Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 27 'It portrays my region/Scotland/Northern Ireland/Wales fairly to the rest of the UK'

% Rating for delivery 10/9/8/7



 = 95% statistically significantly higher than Wales

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 watch any PSB channels regularly or occasionally. All Channels Combined (2015 = 3606)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Children's PSB



Children's PSB

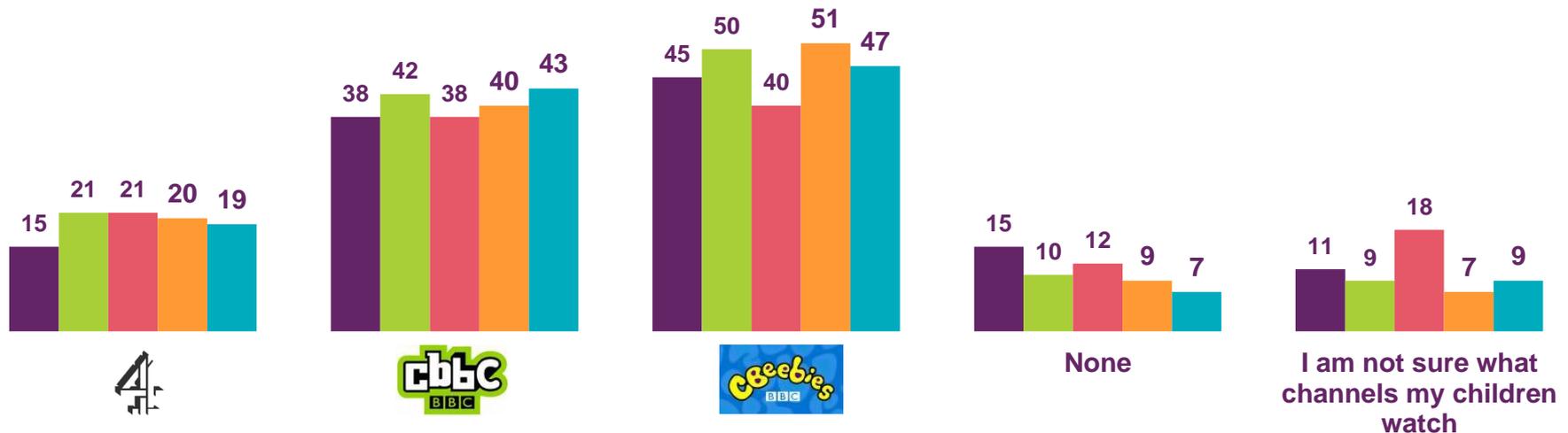
This section looks in detail at Children's PSB. Children's programming is broadcast on the dedicated children's channels from the PSB broadcasters and commercial broadcasters. The importance and delivery questions about CBeebies and CBBC were asked of those that were parents/carers of at least one child aged under 16 that watched at least one of these channels, and the questions about Channel 4 were asked of parents/carers of at least one child aged 12-15 that watched this channel.

Key themes

- As seen in previous years, CBBC and CBeebies were significantly more likely to be viewed by children than Channel 4 was.
- Rating the importance of children's PSB programming, just under nine in ten (88%) said it is important that *'it provides a wide range of high quality, UK-made programmes for children'*.
- The dedicated children's channels, CBBC and CBeebies, received high ratings for delivery on offering *'a wide range of high quality and UK-made programmes for children'*. There were no significant differences between the two channels in terms of delivery of Children's programmes (76% and 83% respectively).
- 78% of parents/carers of children aged 12-15 who watched Channel 4 agreed it was important that *'It provides a wide range of high-quality and UK-made programmes for older children'*. 70% felt it delivered on this statement. NB the base size for this question was under 100, so results should be viewed as indicative only.
- There was no significant difference between perceived importance and delivery for Childrens PSB broadcasters combined (88% and 85%, respectively).

Fig 28 Proportion of UK sample's children that are regular viewers of children's PSB channel

■ 2011 ■ 2012 ■ 2013 ■ 2014 ■ 2015



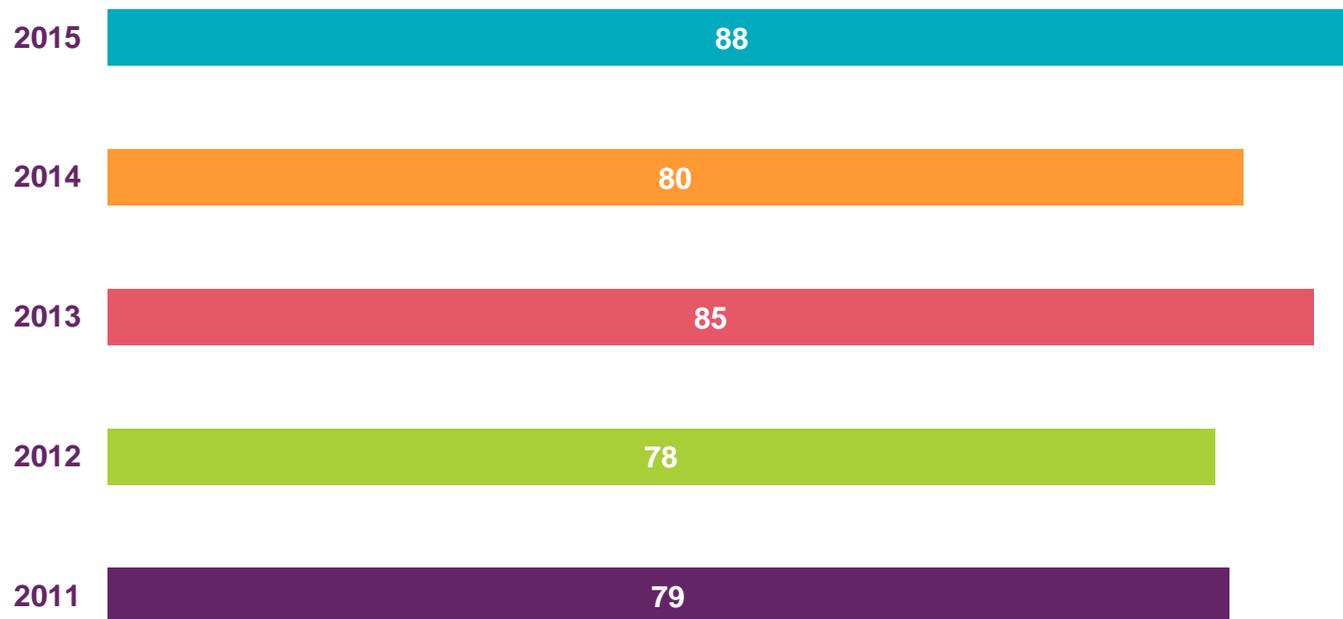
Q On which of these channels does/do your child/children regularly watch programmes aimed specifically at children? NB "aimed specifically at children" was only added in 2011.

Base: All responsible for children under 16 (2011=529, 2012=636, 2013=518, 2014=453, 2015 = 800),

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 29 Parents' opinions on the importance of Children's PSB

'It provides a wide range of high-quality and UK-made programmes for children'



NB in 2010 the question was asked as part of the main Importance and Delivery section along with the other statements. In 2011 it was asked in a separate children section, after the questions on overall satisfaction had been asked.
 In 2010 channels asked about were BBC One, BBC Two, ITV1, Channel 4, Five, Cbeebies and CBBC. In 2011 BBC Two, ITV1 and Channel 4 were not included. In 2012 BBC One was not included and in 2014 CITV was added. In 2015 the channels asked about were CBBC and Cbeebies.

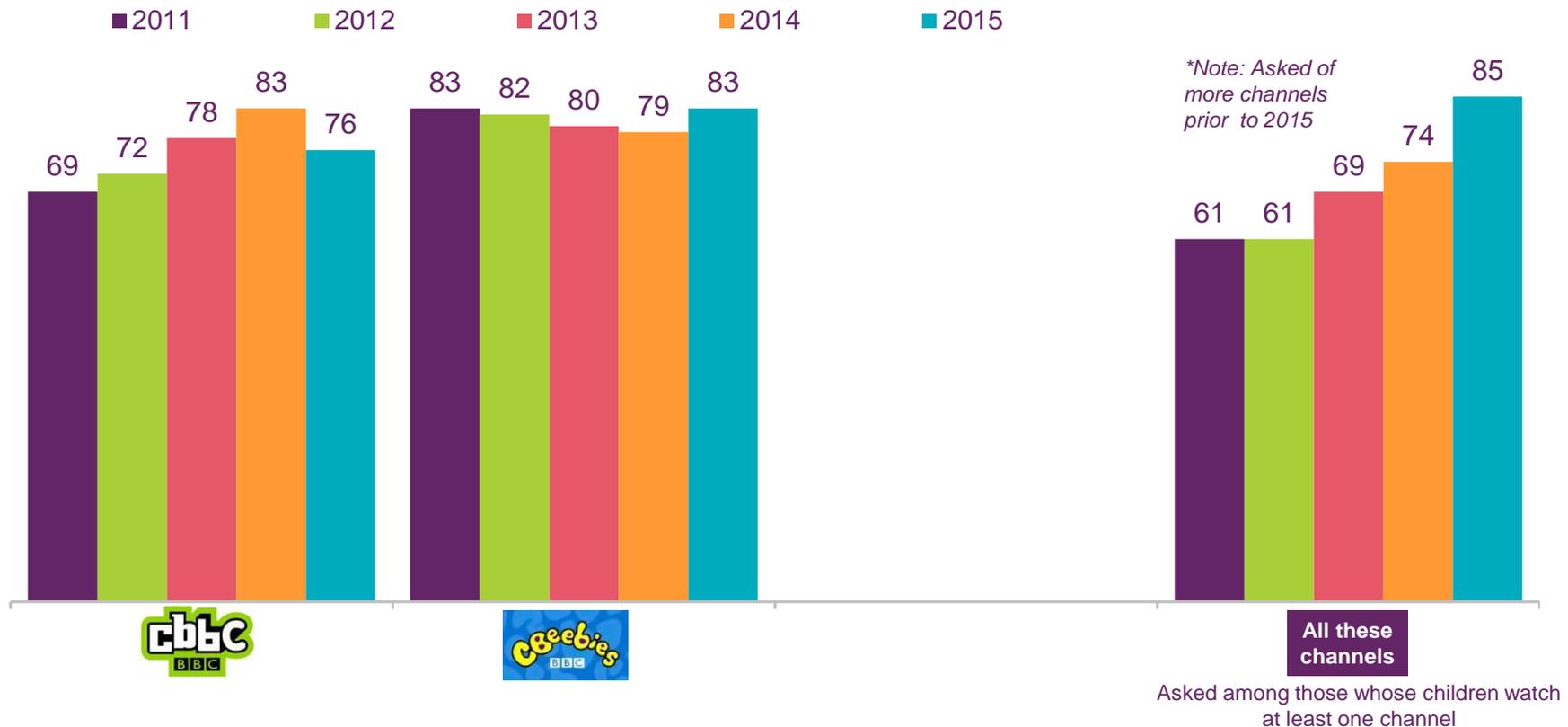
Extent to which the characteristic is important, where 10 means 'extremely important' and 1 means 'not at all important' (% rating 10/9/8/7)

Base: All whose children regularly watch any of those channels BBC One, Channel 5, Cbeebies, CBBC (2011=363, 2012=487, 2013=333, 2014=321); All whose children regularly watch any of these channels: CBBC, Cbeebies (2015=511)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 30 Parents' opinions on the delivery of Children's PSB

'It provides a wide range of high-quality and UK-made programmes for children'

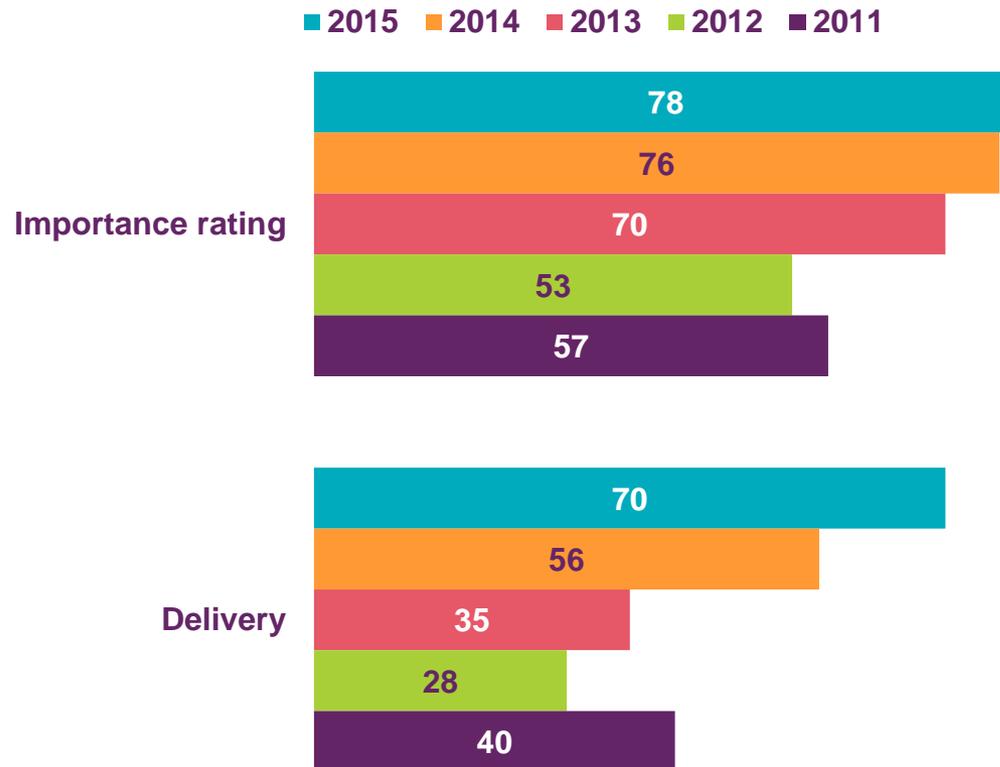


*In 2015 this was asked of those whose children watch at least CBBC or CBeebies. In previous years it had also included BBC Alba, S4C, Channel 5 and CiTV as well
 Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and one is the lowest. (% rating 10/9/8/7)
 Base for 'all children's' PSB channels: All respondents whose children regularly watch at least one channel (363,487,333,321,511)
 Base for individual channels: Those whose children are regular viewers of each channel featured (CBBC = 180, 271, 203, 181, 375 CBeebies = 218, 320, 218, 214, 383)
 Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Fig 31 Parent's opinion on Channel 4 – indicative only

'It provides a wide range of high-quality and UK-made programmes for older children'

% Rating 10/9/8/7



*NB Asked of all children's PSB channels combined for the similar statement, '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 is the highest score and one is the lowest (% rating 10/9/8/7).

Base: All those with a child aged 12-15 that watches C4 (55, 68, 64, 52, 104) – CAUTION SMALL BASE SIZES.

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

Individual PSB channel summaries



PSB channel summaries

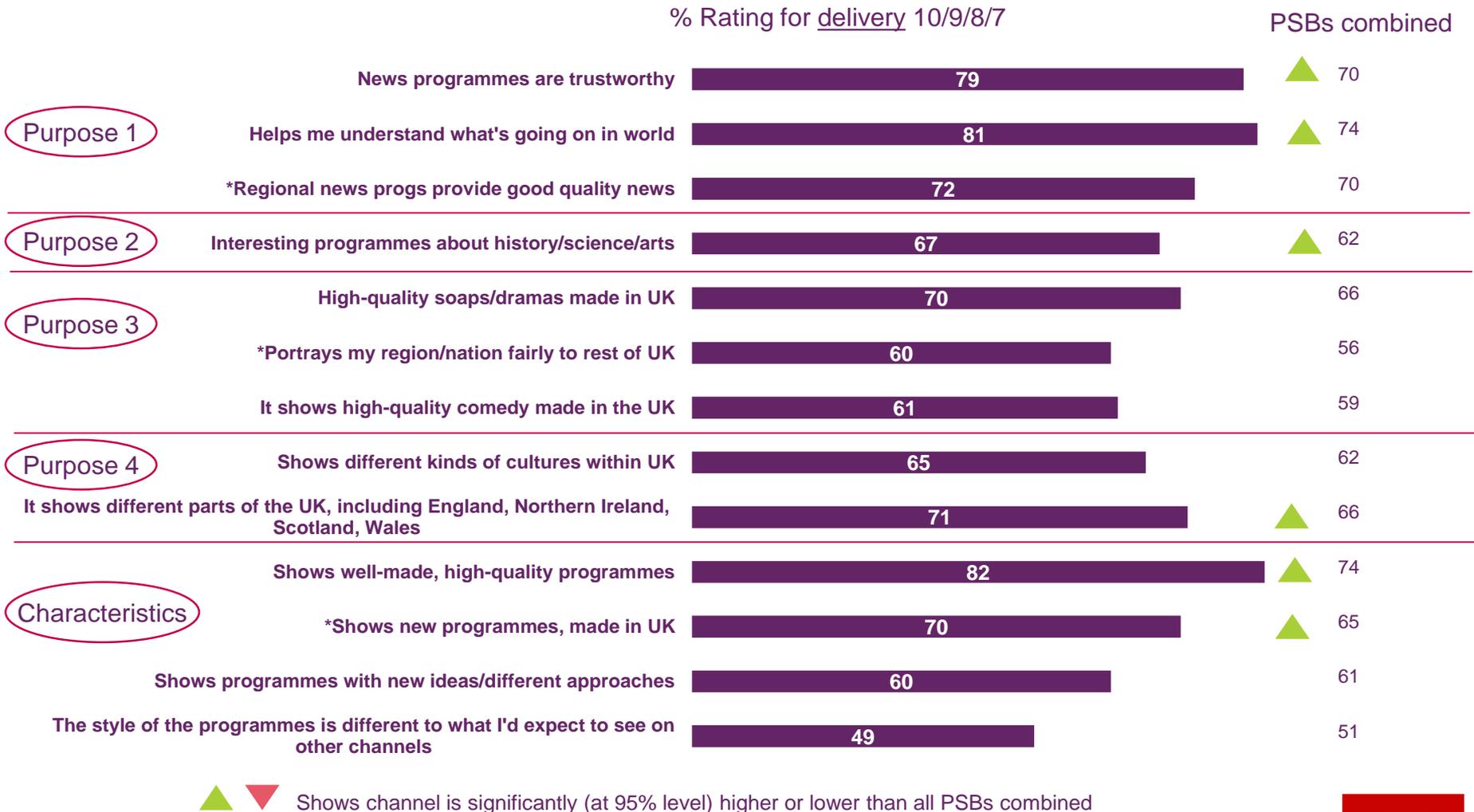
The following charts summarise audience opinion of the delivery of each of the Purposes and Characteristics for BBC One, BBC Two, ITV1 and Channel 4, among regular viewers of each channel.

Key themes

- BBC One's highest score was 82% for '*Shows well-made, high-quality programmes*'. Its lowest score was for '*The style of the programmes is different to what I'd expect to see on other channels*' (49%).
- BBC Two's highest score was for the same statement as BBC One - '*Shows well-made, high-quality programmes*' (81%). Its lowest score was for '*Portrays my region/nation fairly to rest of UK*' (42%).
- For ITV1, three statements each received the highest score - '*News programmes are trustworthy*', '*High-quality soaps/dramas made in UK*', and '*Shows well-made, high-quality programmes*' (all 78%). Its lowest score was for the same statement as BBC One – '*The style of the programmes is different to what I'd expect to see on other channels*' (44%).
- Channel 4's highest score was 70% for '*Shows programmes with new ideas/different approaches*'. Its lowest score was 38%, for '*Portrays my region/nation fairly to rest of UK*'.



Fig 32 BBC One

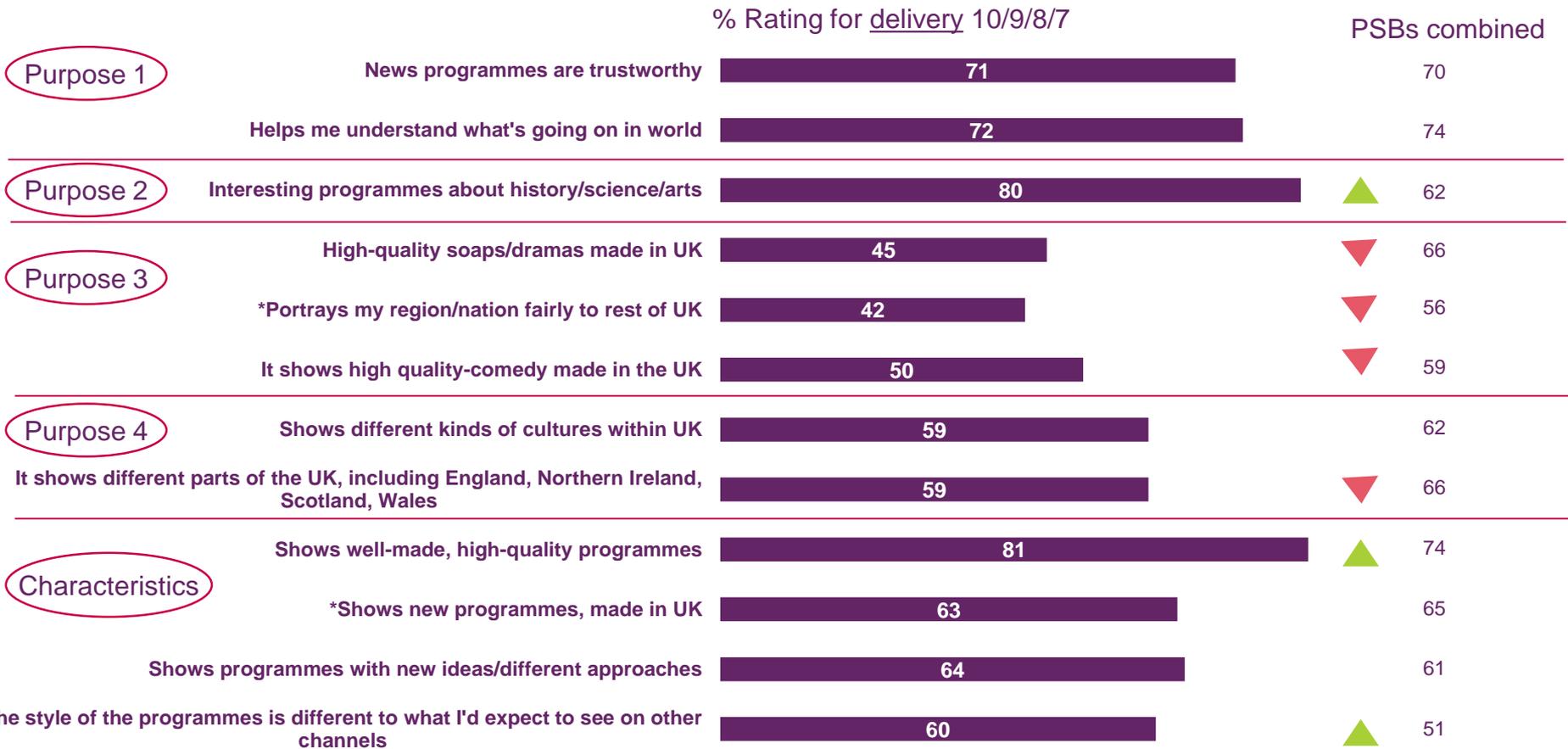


Base: Self-reported regular viewers of BBC One (2597), Self-reported regular/occasional viewers of any PBS channel (3606)

*Slightly amended wording of statements since 2011.



Fig 33 BBC Two



▲ ▼ Shows channel is significantly (at 95% level) higher or lower than all PSBs combined

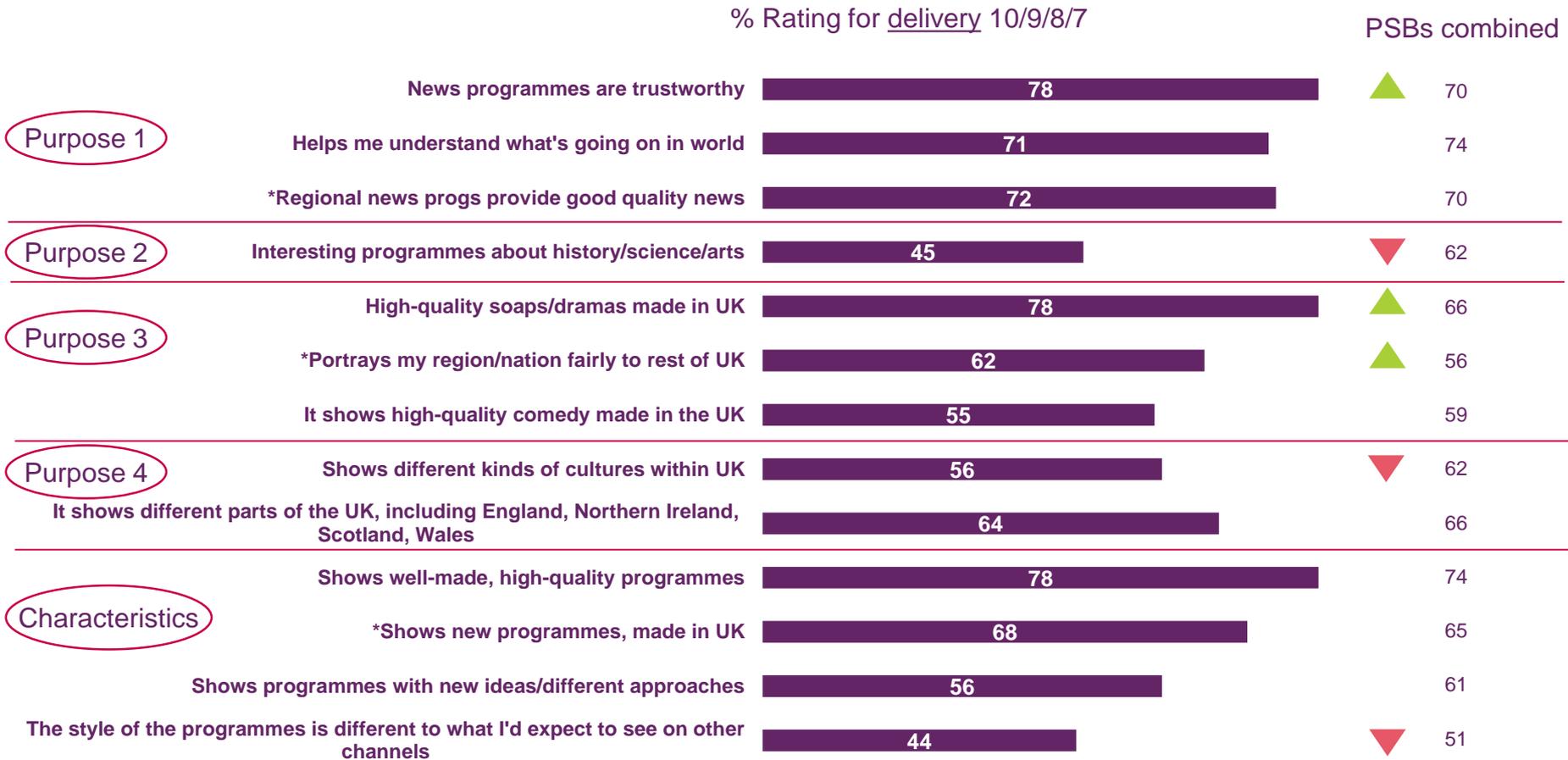


Base: Self-reported regular viewers of BBC Two (1386), Self-reported regular/occasional viewers of any PBS channel (3606)

*Slightly amended wording of statements since 2011



Fig 34 ITV/STV/ITV Wales/UTV



▲ ▼ Shows channel is significantly (at 95% level) higher or lower than all PSBs combined



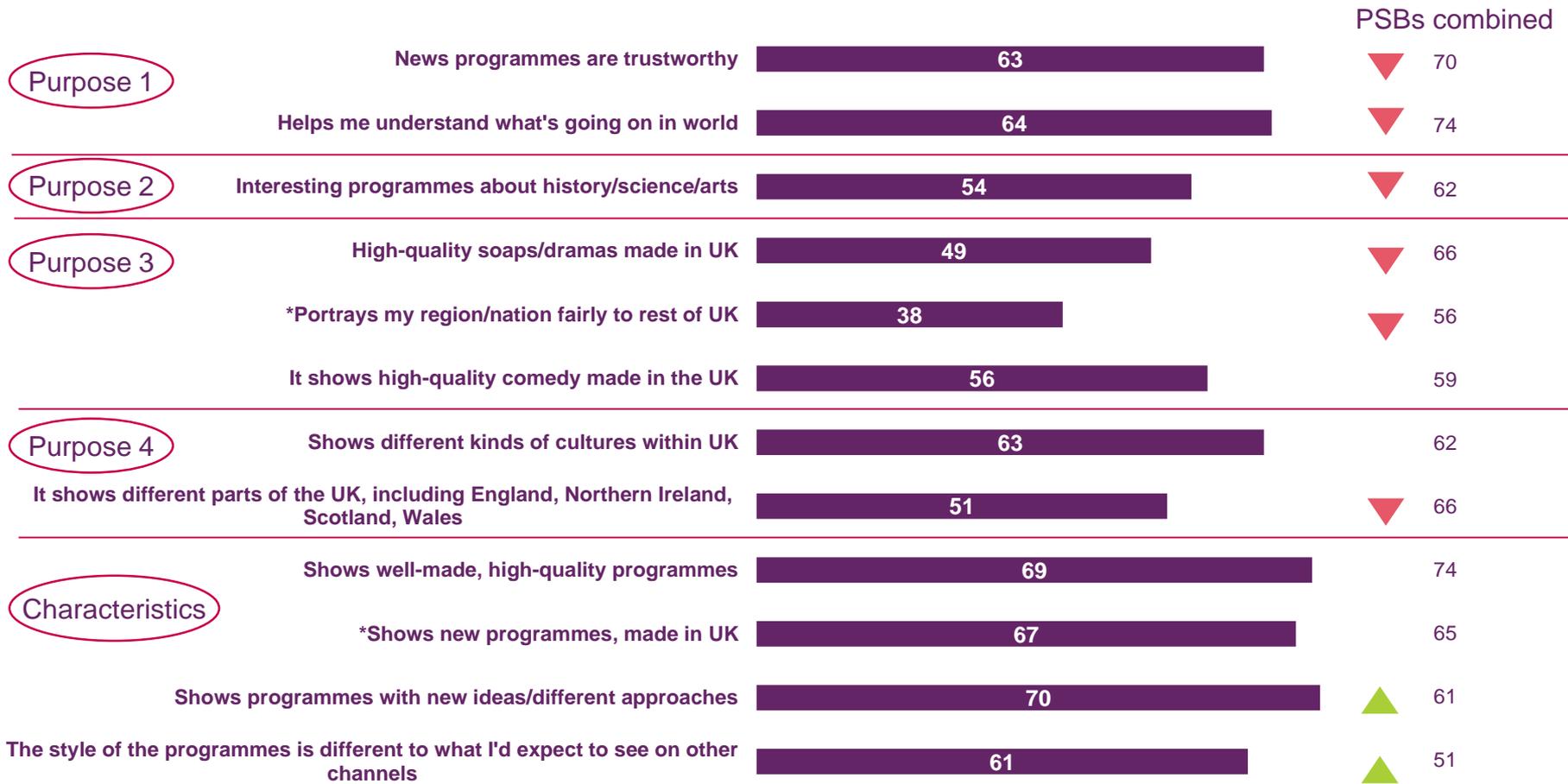
Base: Self-reported regular viewers of ITV1 (2025), Self-reported regular/occasional viewers of any PBS channel (3606)

*Slightly amended wording of statements since 2011



Fig 35 Channel 4

% Rating for delivery 10/9/8/7



▲ ▼ Shows channel is significantly (at 95% level) higher or lower than all PSBs combined



Base: Self-reported regular viewers of Channel 4 (1391), Self-reported regular/occasional viewers of any PBS channel (3606)

*Slightly amended wording of statements since 2011

BBC portfolio channel summaries

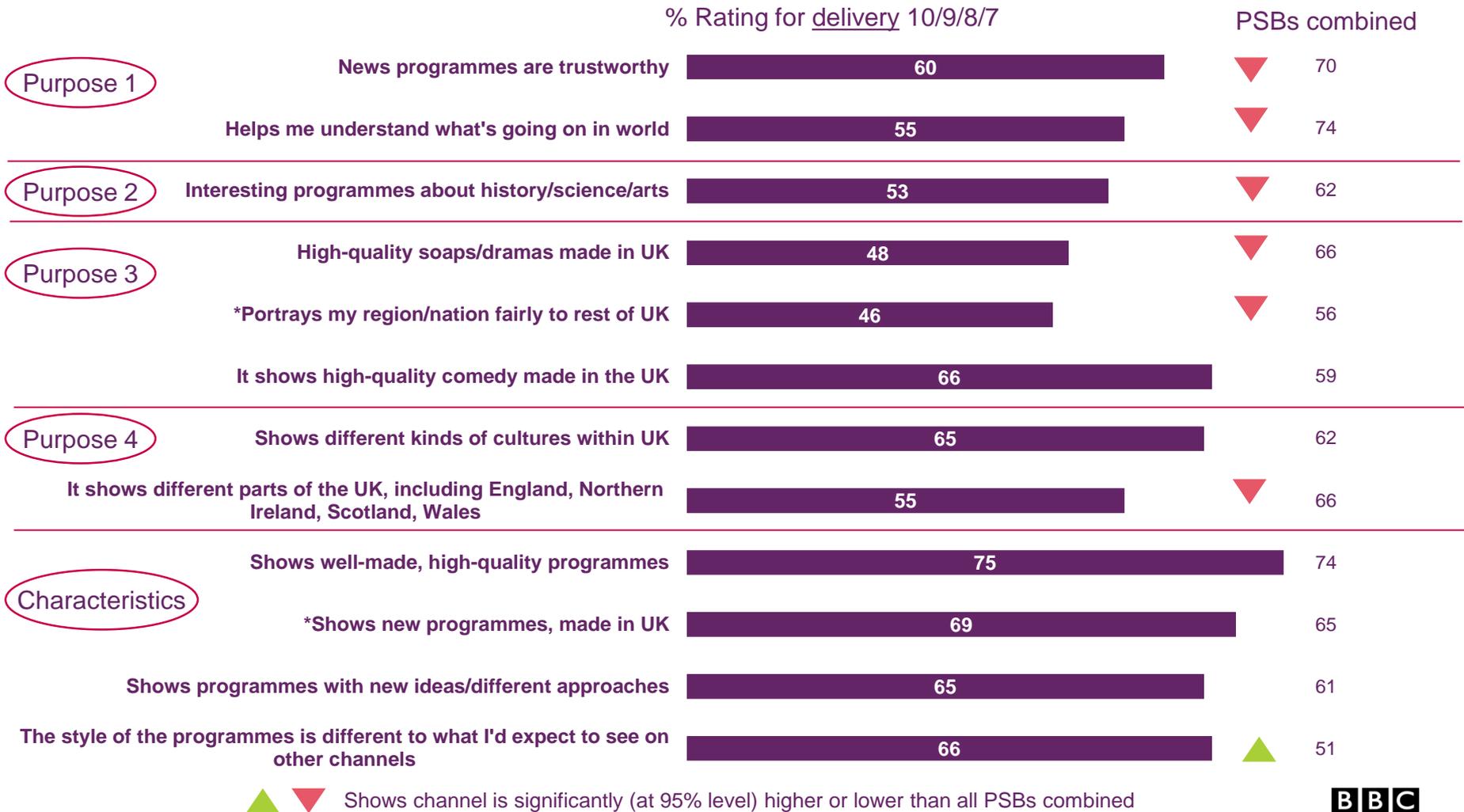
The following charts summarise audience opinion of the delivery of each of the Purposes and Characteristics for BBC Three and BBC Four among regular viewers of each channel.

Key themes

- BBC Three's highest score was 75% for '*Shows well-made, high-quality programmes*'. Its lowest score was for '*Portrays my region/nation fairly to rest of UK*' (46%).
- For BBC Four the highest score was for it showing '*Interesting programmes about history/science/arts*' (74%). Its lowest score was for the same statement as BBC Three – '*Portrays my region/nation fairly to rest of UK*' (40%).

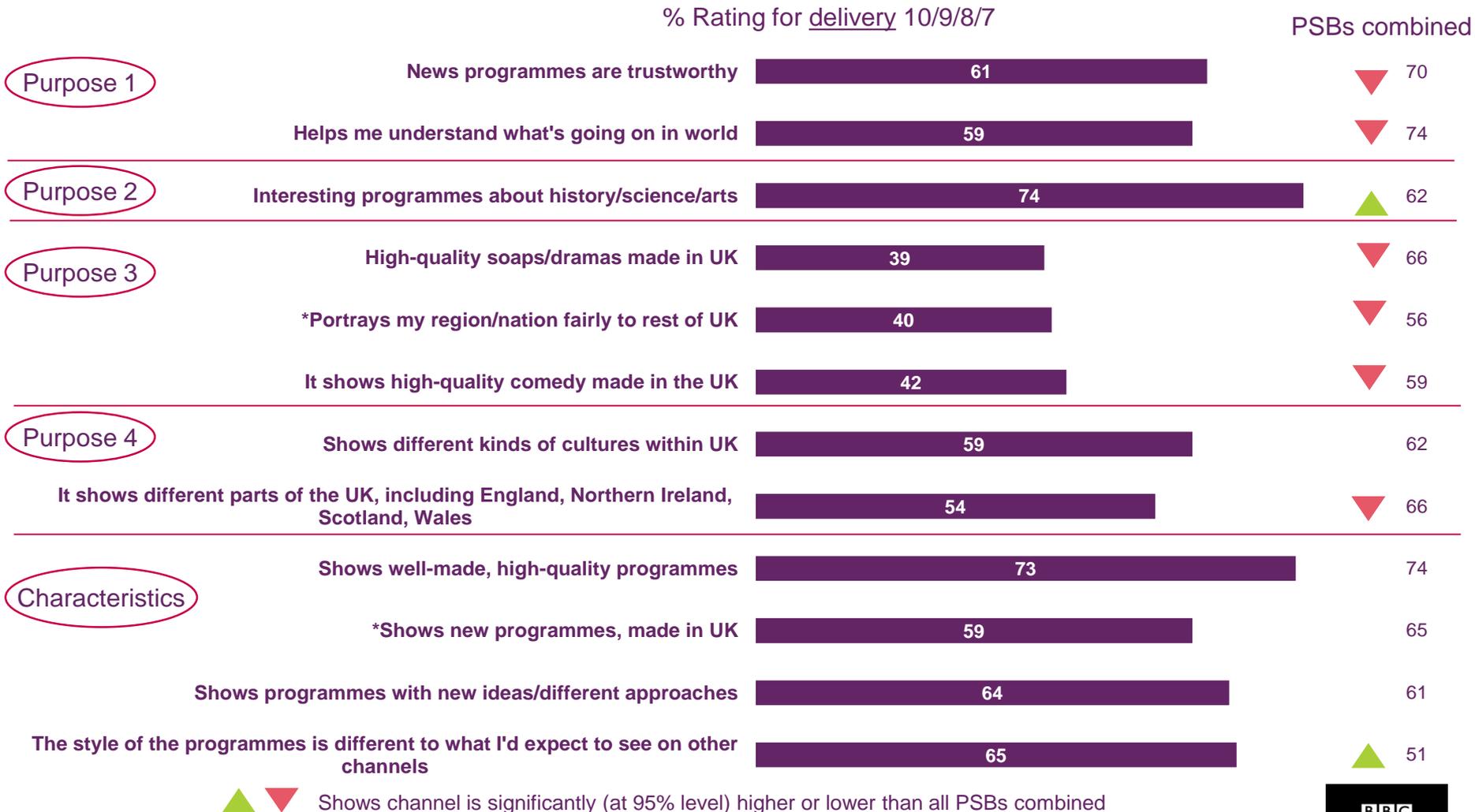


Fig 36 BBC Three



Base: Self-reported regular viewers of BBC Three (617), Self-reported regular/occasional viewers of any PBS channel (3606)
 *Slightly amended wording of statements since 2011.

Fig 37 BBC Four



PSB website use and online viewing

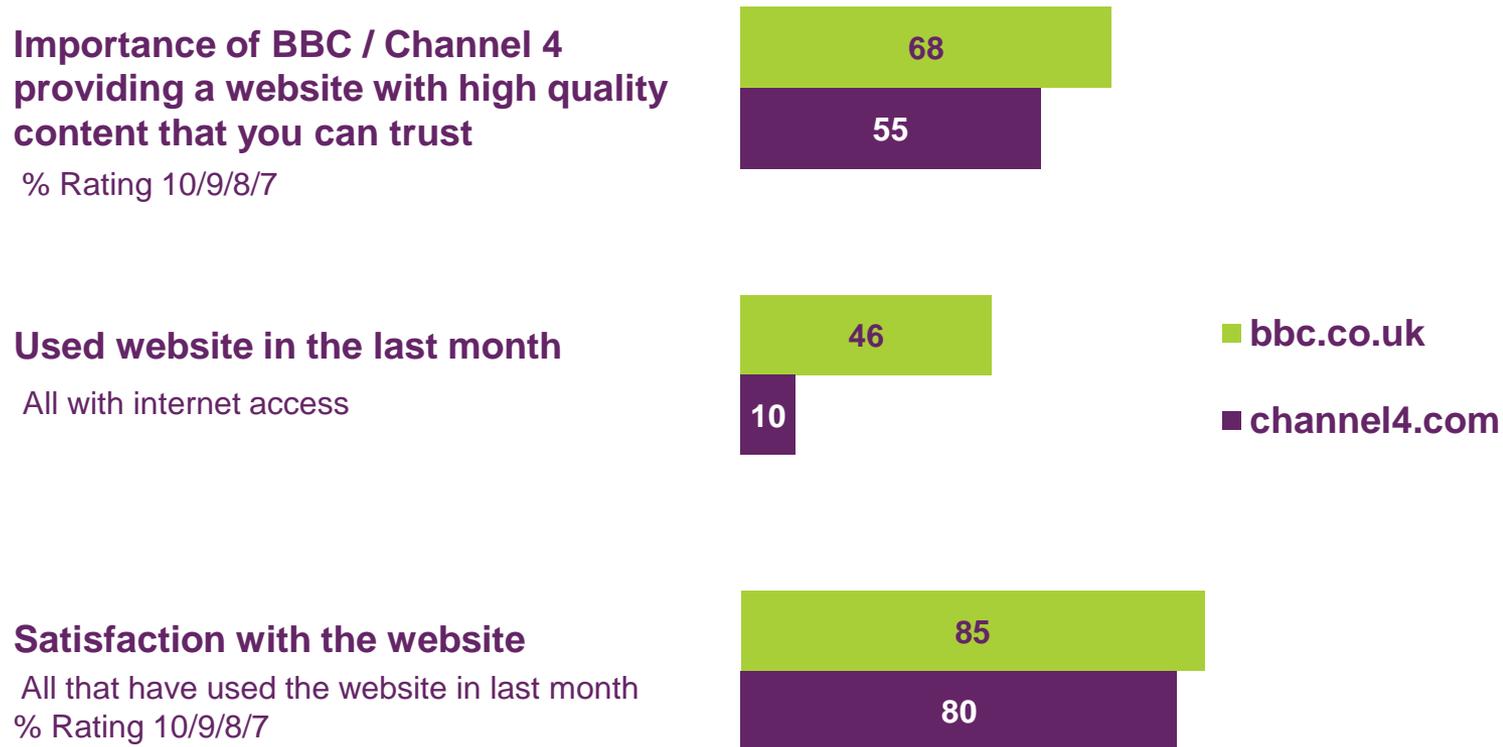
PSB website use and online viewing

This section looks at usage of the PSB channels' websites (bbc.co.uk and channel4.com only), and the main PSB catch up services.

Key themes

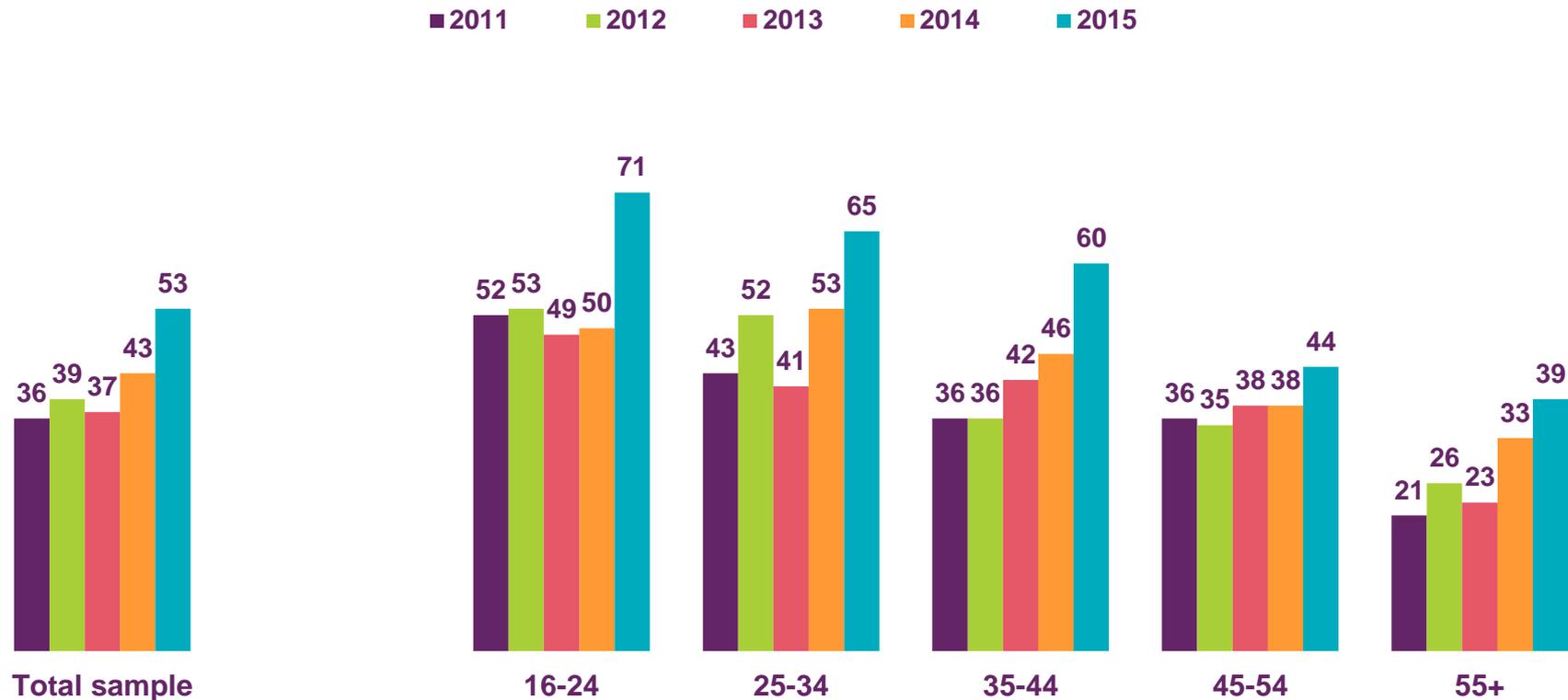
- Just over two-thirds (68%) of all respondents felt that it was important (i.e. gave a rating of 10/9/8/7) that '*the BBC provides a website with high quality content that you can trust*'. Over half (55%) of respondents felt that it was important that Channel 4 do the same.
- The level of those with internet access using the channels' websites in the last month was 46% for bbc.co.uk and 10% for channel4.com.
- Over four in five of respondents were satisfied with using the websites (85% for bbc.co.uk and 80% for channel4.com).
- Just over half (53%) claimed to use the internet to watch or download programmes or films.
- The most frequently viewed PSB catch-up service amongst respondents was BBC iPlayer, with 50% of using it at least once a month or more, followed by ITV Player/Hub (36%), All 4 (27%), and Demand 5/My5 (17%).
- Satisfaction amongst users of each On Demand service followed the pattern of overall usage. BBC iPlayer had the highest satisfaction (84% of iPlayer users were satisfied), followed by ITV Player (75% of ITV Player users were satisfied), All 4/4oD (70%), and Demand 5/My5 (61%).
- Seventy-four percent of all respondents felt that it was important (i.e. gave a rating of 10/9/8/7) that broadcasters provide catch-up services that allow viewers to watch previously broadcast programmes.

Fig 38 Attitudes towards BBC and Channel 4 online platforms



Base: All (3653), All with internet access (3463), All that have used this website in last month: (bbc.co.uk 1916, channel4.com 449)

Fig 39 Online viewing

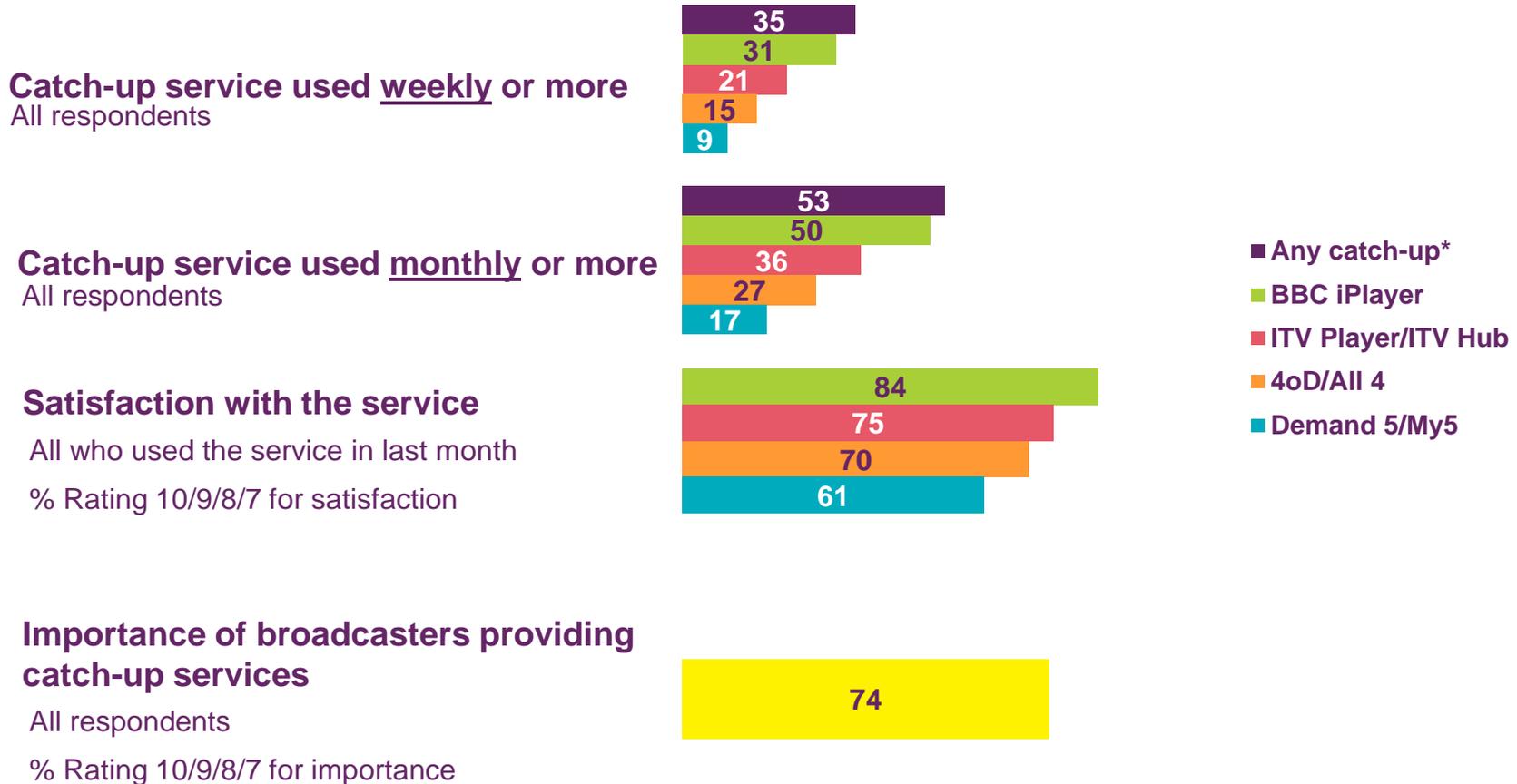


Q Do you ever use the internet to watch or download programmes or films?

Base: All with internet access (2011=2295, 2356, 3320, 2429, 3463), 16-24 (392, 400,398, 398, 536), 25-34 (410, 426, 427, 427, 562), 35-44 (501, 495, 519, 463, 607), 45-54 (410, 433,412, 456, 598), 55+ (582, 602,661, 685, 1160)

Note: Methodology change in 2015 – data shown between 2011 and 2014 has been reweighted for comparison purposes. Only statistically significant changes between 2014 and 2015 shown.

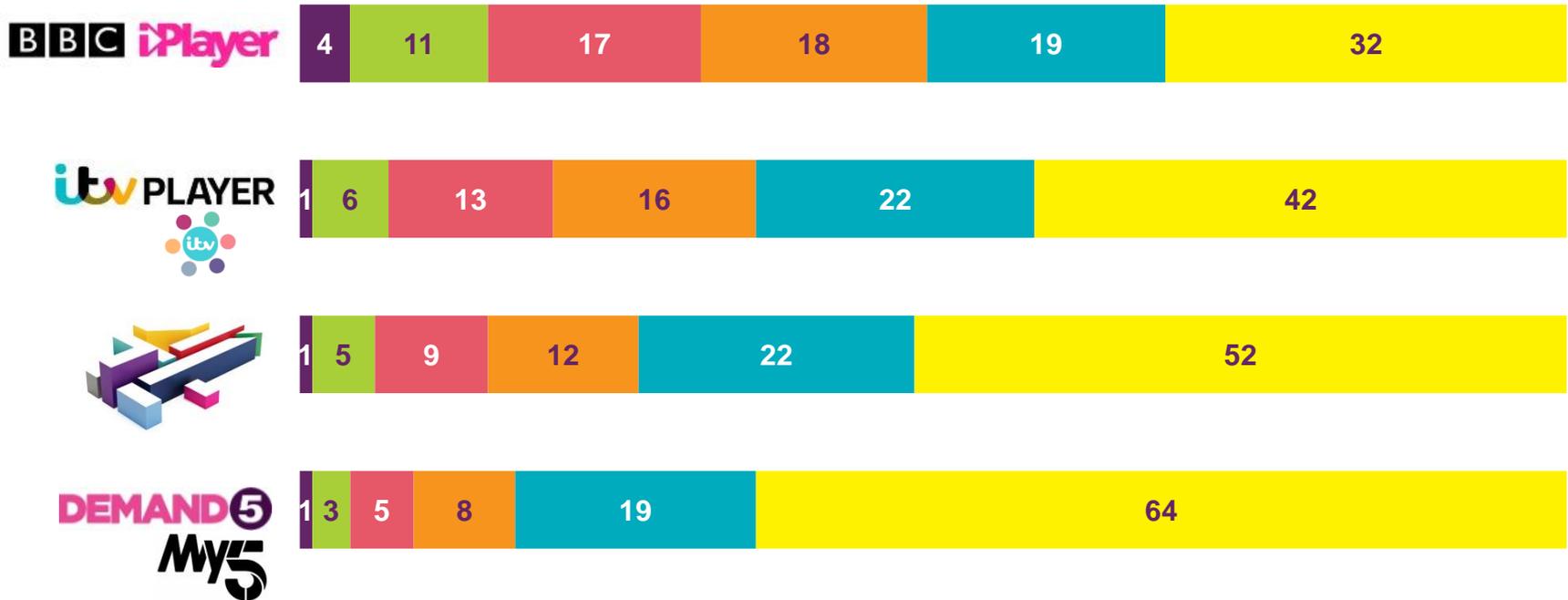
Fig 40 Catch-up services



Q And for each one please could you tell me how often you typically watch each one. Base: All (3653)
 Q And how would you rate your overall satisfaction with {online player}? Base: All that have used this service in the last month (BBC iPlayer 2806, ITV Player/ITV Hub 2395, All4/4oD 2114, , Demand 5/My 5 1603)
 Q How important do you think it is that broadcasters provide these types of catch-up services, that allow viewers to watch previously broadcast programmes? Base: All 3653
 "Any catch up" includes S4C Clic

Fig 41 Frequency of viewing On Demand services

- Every day
- Several times a week
- At least once a week
- At least once a month
- Less than once a month
- Don't use this service



Q Please could you tell me how often you typically watch each one.
 Base: All respondents (3653)

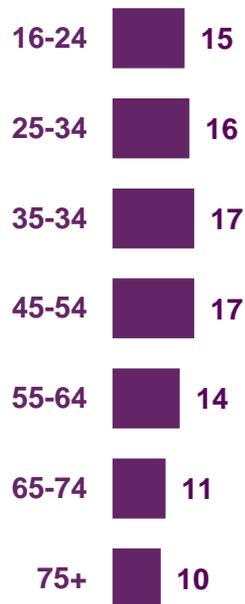
Demographics



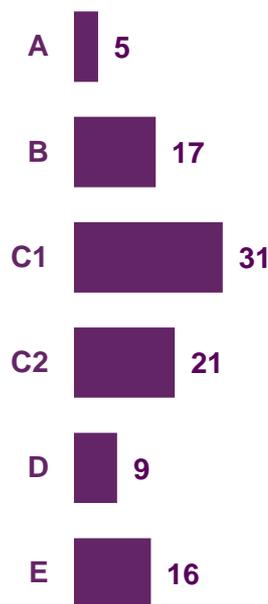
Gender



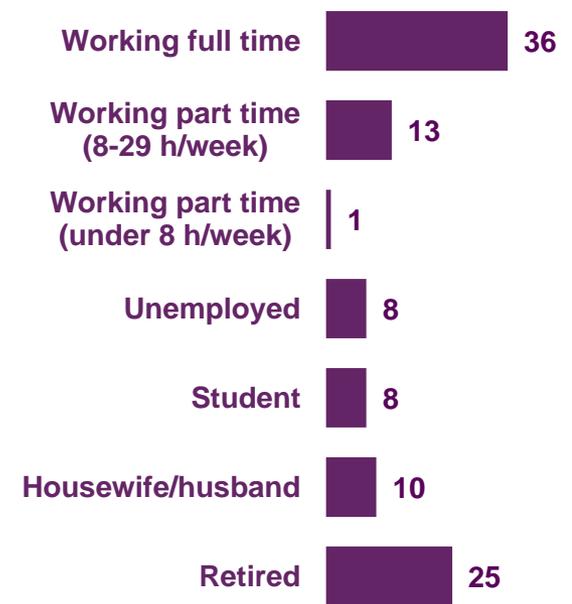
Age

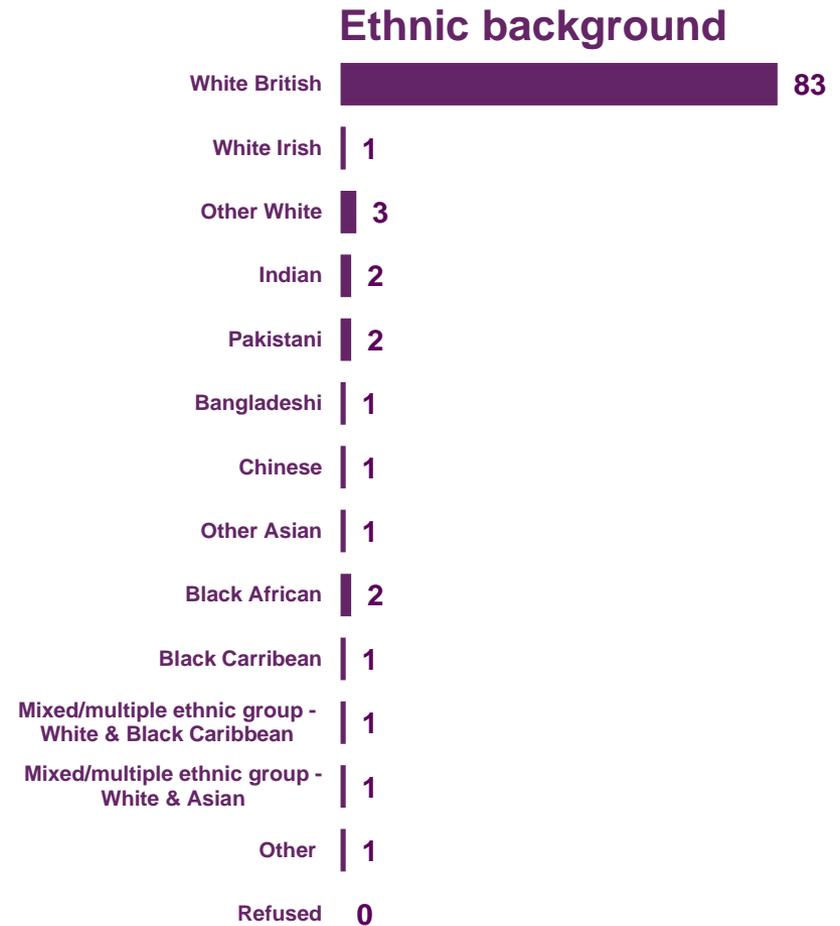


Social Class



Working status

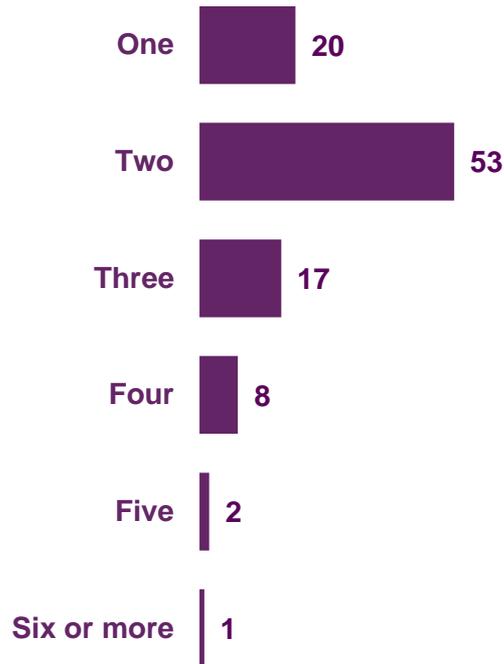






Household size and composition

Number of adults (16+) in household



Children under 16 in household



Responsible for children under 16



Demographics

Q How many ADULTS aged 16+ including yourself, live in your household?

Q Are there any children under 16 in your household?

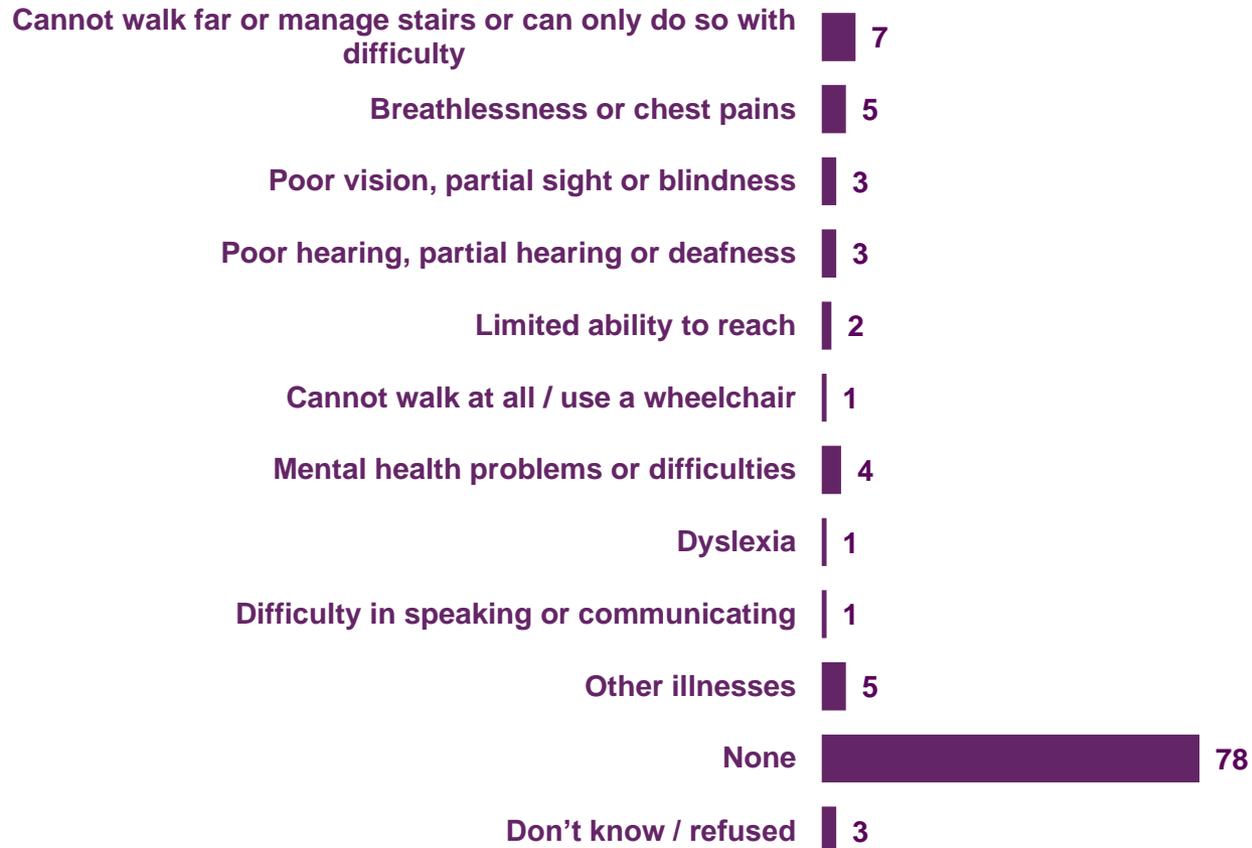
Q Thinking about the children under 16 in your household, please can you tell me how many fall into each of the following age bands?

Q And are you responsible for the children under 16 in your household? In other words – are you their parent or carer?

Base: All (3653)



Limitations in daily activities or work



Q Which of these, if any, limit your daily activities or the work you can do?

Base: All (3653)