

## D – PSB Audience Impact

PSB Report 2011 – Information pack  
June 2012

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# Background

# Background (1) – 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, ITV1, Channel 4, Channel 5, BBC3, BBC4, BBC News, S4C) 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 asked (self-defined) regular viewers of each PSB channel their opinion of 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>

## Background (2) – PSB tracker survey 2011

- It is important to note that in 2011 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 2011, 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 rate 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 later chart 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
- 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 significant at the 99% level to accommodate the impact of sample design and weighting. This means that there is 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. In previous reports, significance testing was performed at the 95% level so this represents a more robust approach to reporting. As mentioned later, due to re-weighting of historic data, significant differences between 2007/2010 and 2011 are not shown, however significant differences between groups within 2011 are indicated.

## Background (3) – Measures evaluated (i)

PSB purposes and characteristics	PSB Tracker statements 2011
<p><b>Purpose 1:</b> 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>Its news programmes are trustworthy.</p> <p>Its programmes help me understand what's going on in the world today.</p> <p>Its regional news programmes provide a wide range of good quality news about my area. *</p>
<p><b>Purpose 2:</b> To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning</p>	<p>It shows interesting programmes about history, sciences or the arts.</p>
<p><b>Purpose 3:</b> 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</p>	<p>It shows high quality soaps or dramas made in the UK.</p> <p>Provides a wide range of high quality and UK-made programmes for children.</p> <p>Provides a wide range of high quality and UK-made programmes for older children.**</p> <p>It portrays my region (IN ENGLAND)/Scotland/Wales Northern Ireland (IN SMALLER NATIONS) fairly to the rest of the UK. *</p>
<p><b>Purpose 4:</b> 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>Its programmes show different kinds of cultures within the UK.</p>

\*A number of statements were changed in 2011 – see following charts

\*\*Only asked of parents of 12-15 of year olds that watch Channel 4

## Background (4) – Statements evaluated (ii)



PSB purposes and characteristics	PSB Tracker statements 2011
<b>High quality</b> – well-funded and well-produced	It shows well-made, high quality programmes.
<b>Original</b> – new UK content rather than repeats or acquisitions	It shows new programmes, made in the UK. *
<b>Innovative</b> – breaking new ideas or re-inventing exciting approaches, rather than copying old ones	It shows programmes with new ideas and different approaches.
<b>Challenging</b> – making viewers think	It shows programmes that make me stop and think.
<b>Engaging</b> – remaining accessible and attractive to viewers	It shows programmes I want to watch.

\*A number of statements were changed in 2011 – see following charts

## Background (5) - Statement changes in 2011



Pre 2011 statement	Notes on pre 2011 statement	2011 statement	Notes on 2011 statement
<i>Its (regional)/ news programmes for people in Scotland/ Wales/NI provide a wide range of good quality news about my area/ Scotland /Wales, NI</i>	Statement was customised to nation.  “regional” and “my area” only used in England.	<i>Its regional news programmes provide a wide range of good quality news about my area.</i>	Same statement used across all nations.
<i>It portrays my region (IN ENGLAND)/Scotland /Wales/NI well to the rest of the UK</i>	Statement customised to nation.  “my region” used in England instead of nation’s name	<i>It portrays my region (IN ENGLAND)/Scotland /Wales/NI fairly to the rest of the UK</i>	Only change was that “well” was changed to “fairly”
<i>It shows enough new programmes, made in the UK</i>		<i>It shows new programmes, made in the UK</i>	Only change was that “enough” was removed
<i>Provides a wide range of high quality and UK made programmes for children</i>	Asked as part of main statement bank		Moved to later in the questionnaire.
<i>Provides a wide range of high quality and UK made programmes for <b>older</b> children</i>	Not asked	<i>Provides a wide range of high quality and UK made programmes for <b>older</b> children</i>	Asked only of parents of 12-15 year old Channel 4 viewers



## 2011 Methodology – further detail

- Telephone interviews (CATI) with UK adults aged 16+.
- Interview length – c.20 minutes.
- Fieldwork ran across the year, from March-December.
- 3,109 interviews (1663 in England; 504 in Scotland; 477 in Wales; 465 in Northern Ireland).
- Quotas were applied and survey data is weighted to be nationally representative of adults 16+. Weights applied to: Gender, Age, Nation and Region, Social grade, Working status and Ethnicity.
- An additional ‘Welsh Boost’ survey was conducted among respondents living in Wales who watch S4C.
- Unless stated otherwise, analysis is based on self-defined regular viewers of each channel.
  
- A full technical appendix can be found here:  
<http://stakeholders.ofcom.org.uk/binaries/broadcast/reviews-investigations/psb-review/psb2012/section-e.pdf>

## Methodology prior to 2011 – further detail

- Telephone interviews (CATI) with UK adults aged 16+.
- Interview length – 25 minutes.
- Fieldwork each year spread over 1 month, four times a year (i.e. quarterly).
- Fieldwork dates: October 2005, January 2006, April 2006, July 2006, October 2006, January 2007, April 2007, July 2007, October 2007, January 2008, April 2008, July 2008, October 2008, January 2009, April 2009, July 2009, October 2009, Jan 2010, April 2010, July 2010, October 2010.
- 1,750 interviews in total conducted each quarter (1,000 in England; 250 in Scotland; 250 in Wales; 250 in Northern Ireland).
- Quotas are applied and survey data is weighted to be nationally representative of adults 16+. Weights applied to: Gender, Age, Region, Social grade and Ethnicity.
- An additional ‘Welsh Boost’ survey of 50 interviews is conducted each quarter, among respondents living in Wales who watch the Welsh language programmes on S4C.
- Unless stated otherwise, analysis is based on self-defined regular viewers of each channel.
- Full details of the change in methodology can be found here <http://stakeholders.ofcom.org.uk/binaries/broadcast/reviews-investigations/psb-review/psb2012/section-e.pdf>

## Results prior to 2011

- The changes in methodology mean that the historic data is not directly comparable to 2011.
- However in order to provide context to the 2011 results, the 2007 and 2010 data have been reweighted. Therefore differences between 2011's results and previous years' may not be real changes, due to the change in methodology, or a combination of factors.
- Due to the reweighting, the figures for 2007 and 2010 are different to those previously published for these years.
- The weights were created by looking at the profile of BBC mainstream viewers, BBC digital viewers and viewers of ITV1, C4 and Five in terms of their age and whether or not they viewed at least one channel in each group regularly. The weights were applied to ensure that the percentages in each group were consistent in 2007, 2010 and 2011. This was in addition to rim weights which were then applied to the demographic weights. These weights were used to reweight the 2007 and 2010 data. Due to the complexities of the changes, it does not cover all differences between the datasets but allows sanity checking of any significant change.

# 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.

### Overview of PSB - Importance

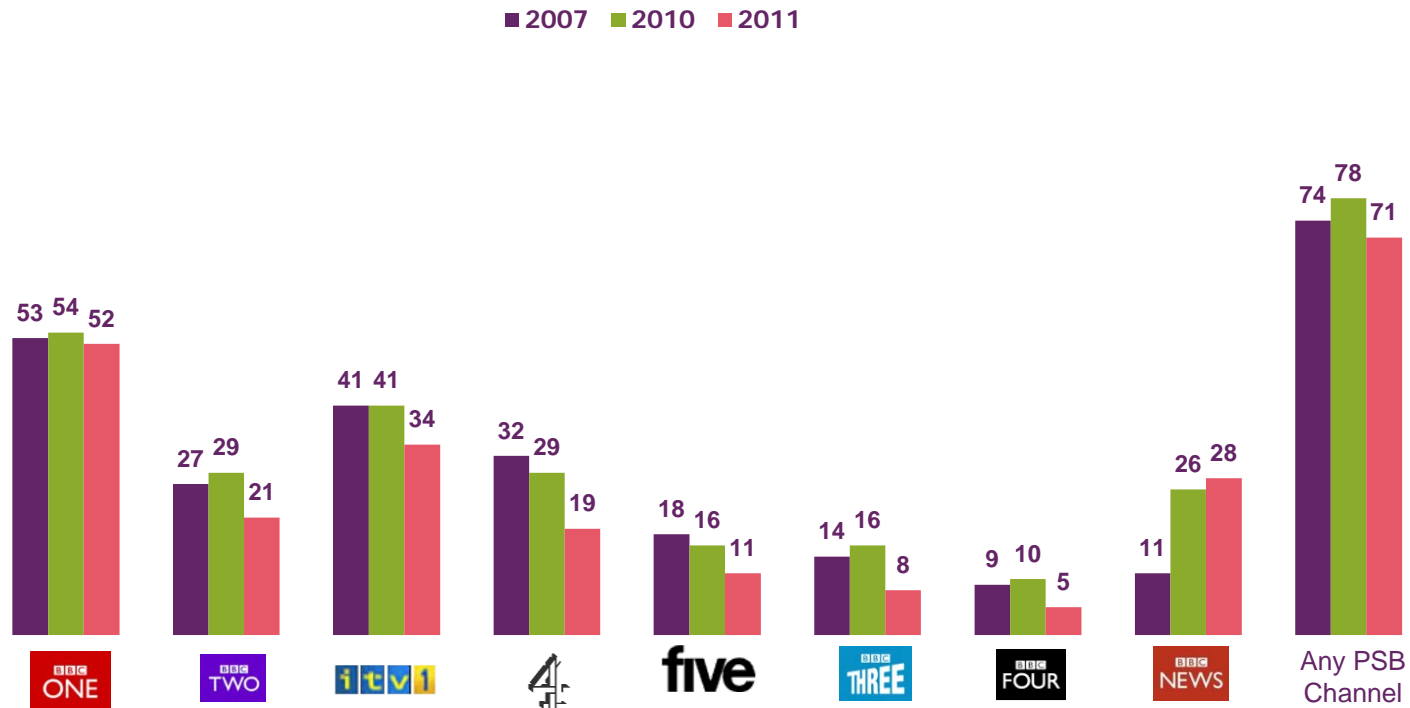
- The single most important Purpose was **Informing our understanding of the world**, with all 3 statements scoring higher than those for any other Purpose. Results for this Purpose ranged from 76%, up to 81% (for *"Its news programmes are trustworthy"*).
- Purposes 3 and 4 were the least important, with 53% rating *"It shows high quality soaps or dramas made in the UK"* (Purpose 3) as important.
- There was a significant gap in importance between the top two Characteristics - *"It shows well-made, high quality programmes"* (78%) and *"It shows programmes I want to watch"* (76%), and the other three (which ranged from 65%-67%).



## Overview of PSB - Delivery

- As per the ratings for importance, Purpose 1 received the highest ratings for delivery. *“Its news programmes are trustworthy”* received the highest score (62%) but there were no significant differences between the three Purpose 1 statements.
- There were no significant differences on delivery between any of the Purpose 2, 3 and 4 statements, which all received either 43% or 46%.
- Again reflecting the ranking for importance, the highest rated Characteristic was *“It shows well-made, high quality programmes”*, (59%), followed by *“It shows programmes I want to watch”* (52% - significantly lower).
- The other Characteristics were significantly lower, ranging from 43%-47% (with no significant difference between them). *“It shows programmes that make me stop and think”* was rated the lowest.
- Figure 9 illustrates the difference in opinion between perceived importance and delivery of the Purposes and Characteristics for the PSB channels combined. Generally the Characteristics have a larger disparity between importance and delivery, most notably for *“it shows programmes that make me stop and think”*, *“It shows programmes I want to watch”*, and *“It shows programmes with new ideas and different approaches”*.
- There was also a similar gap for one of the Purposes, *“It portrays my region/Scotland/Northern Ireland/Wales fairly to the rest of the UK”*
- The Purpose with the smallest disparity between importance and delivery was *“It shows high quality soaps or dramas made in the UK”*. However this was not because it scored particularly highly on delivery (46%), but rather that it had a relatively low score on importance (53%)

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



Base: All respondents (7192, 6964, 3109)



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

									Any PSB Channel
<b>Total regular viewers (% of Total)</b>	52	21	34	19	11	8	5	28	71
<b>Male</b>	50	24	29	19	10	8	5	30	69
<b>Female</b>	53	18	38	20	12	8	4	26	72
<b>16-24</b>	43	15	30	26	11	17	7	22	66
<b>25-34</b>	49	16	32	18	9	13	5	25	69
<b>35-44</b>	51	17	36	23	12	7	4	27	69
<b>45-54</b>	51	21	34	16	13	6	3	27	70
<b>55-64</b>	59	24	34	19	11	3	5	31	75
<b>65+</b>	57	30	35	16	12	5	4	36	77
<b>AB</b>	60	24	29	19	10	8	7	32	75
<b>C1C2</b>	49	18	34	19	11	8	4	26	69
<b>DE</b>	49	21	38	22	13	8	5	28	71
<b>England</b>	52	21	33	19	11	8	5	28	71
<b>Scotland</b>	46	18	38	21	12	8	6	24	70
<b>Wales</b>	55	24	36	17	13	8	3	30	74
<b>N Ireland</b>	49	16	41	18	9	10	5	29	71
<b>White</b>	53	22	34	19	11	8	5	27	71
<b>MEG</b>	43	11	26	24	13	13	4	38	69

Base: All respondents in each demographic group





## Fig 3 The importance of PSB purposes 1 and 2

■ 2011 Importance rating 10/9/8/7    ■ 2010 Importance rating 10/9/8/7    ■ 2007 importance rating: 10/9/8/7

Purpose 1

Its news programmes are trustworthy

81

84

84

Its programmes help me understand what's going on in the world today

78

81

81

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

76

76

76

Purpose 2

It shows interesting programmes about history, sciences or the arts

65

70

67

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

Base: All respondents (2007 = 5357, 2010 (asked of Sample A only) = 3569, 2011 = 3109 )

\*NB: Before 2011 the third statement from the top 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'



## Fig 4 The importance of PSB purposes 3 and 4

■ 2011 Importance rating 10/9/8/7    ■ 2010 Importance rating 10/9/8/7    ■ 2007 importance rating: 10/9/8/7

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



Purpose 4

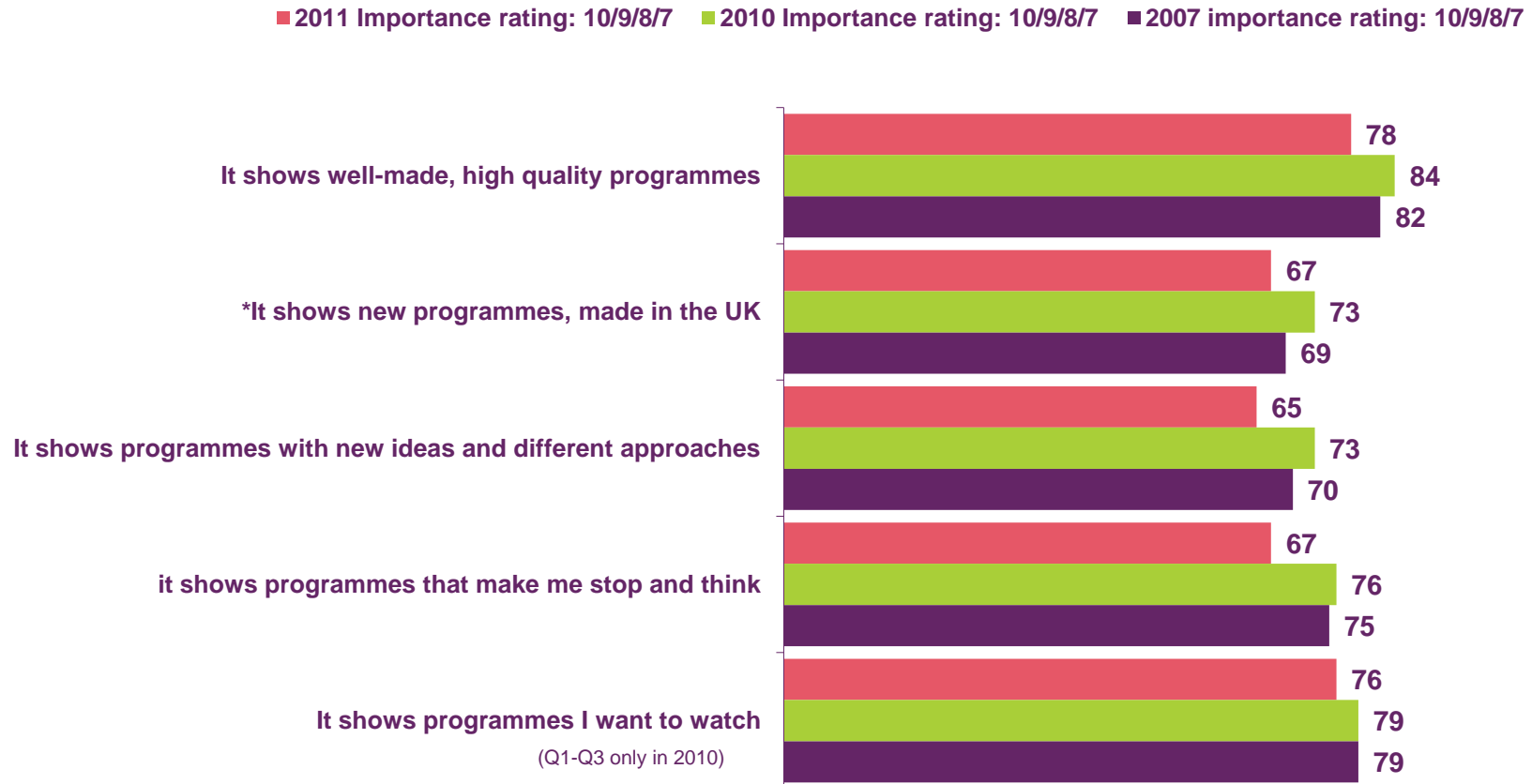
Its programmes show different kinds of cultures within the UK



Extent to which the characteristics is important, where 10 means 'extremely important' and 1 means "not at all important"  
 Base: All respondents (2007 = 5357, 2010 (asked of Sample A only) = 3569, 2011 = 3109)  
 \*NB: Before 2011 the second statement was asked as 'It portrays my region/Scotland/Wales/Northern Ireland well to the rest of the UK'



## Fig 5 The importance of PSB characteristics



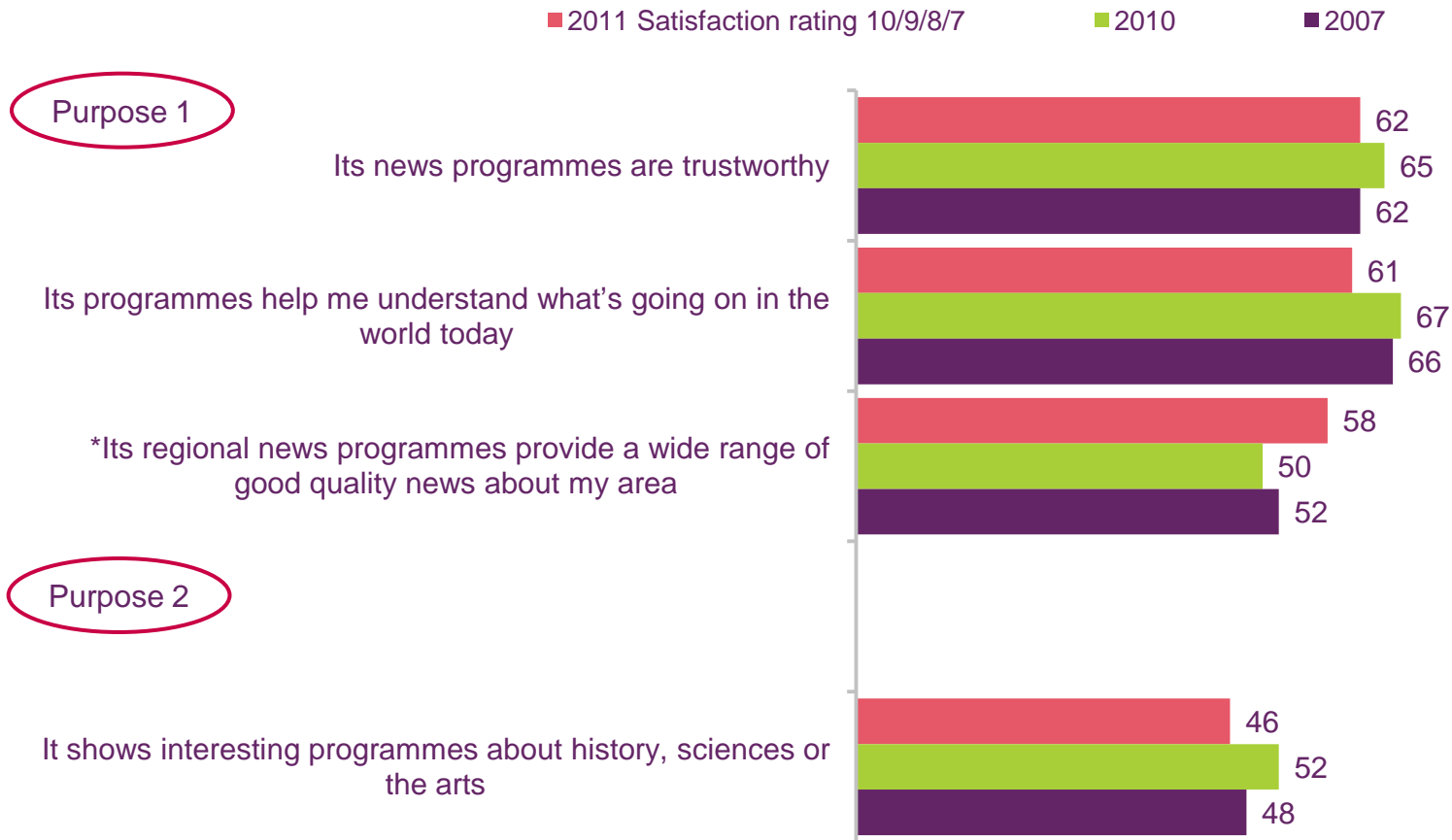
Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”

Base: All respondents (2007 = 5357, 2010 (asked of Sample A only) = 3569, 2011 = 3109)

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



## Fig 6 The delivery of PSB purposes 1 and 2



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 (2007 = 7105, 2010 = 6909; 2011 = 3079)

\*NB: Before 2011 the third statement from the top 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'



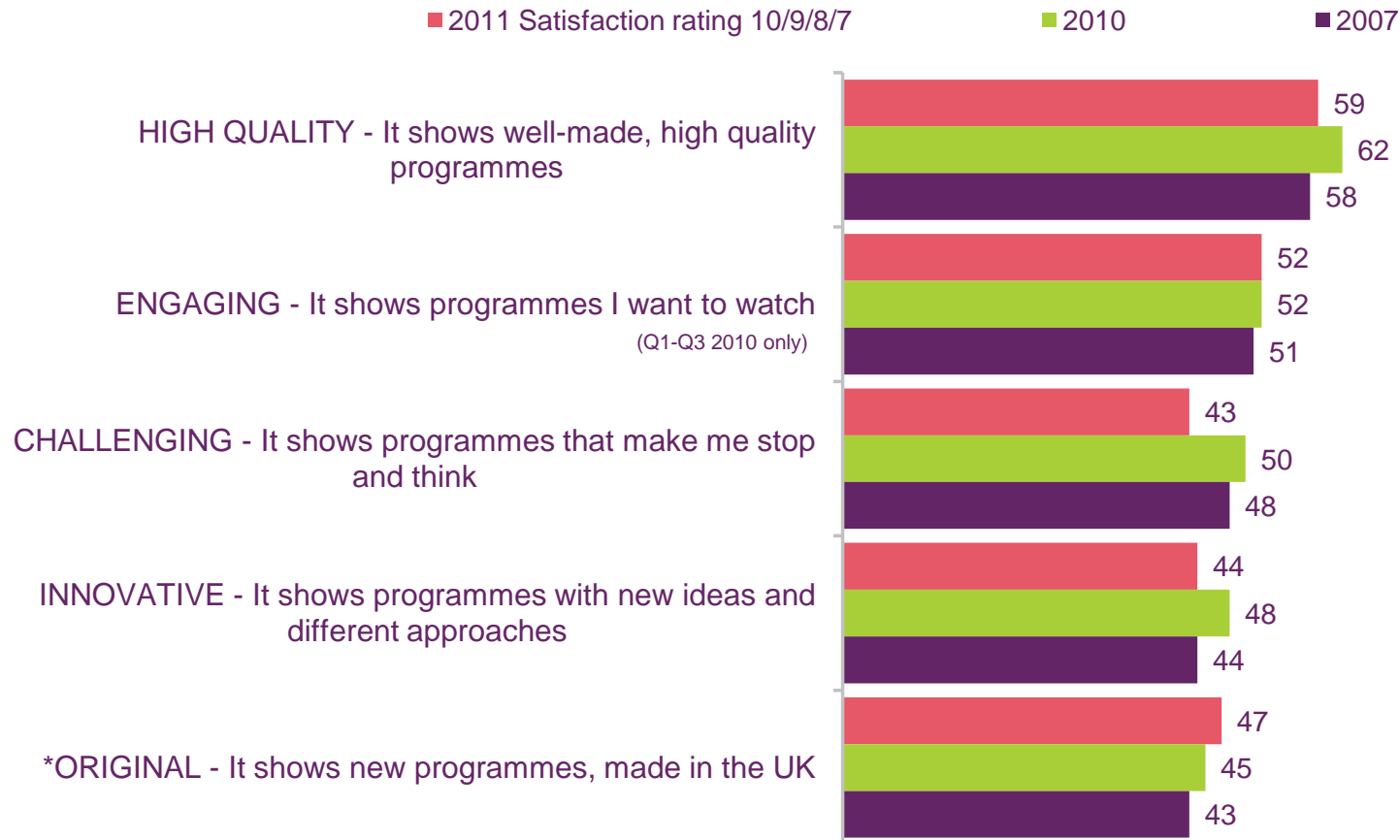
## Fig 7 The delivery of PSB purposes 3 and 4



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 (2007 = 7105, 2010 = 6909, 2011 = 3079)  
 \*NB: Before 2011 the second statement from the top was asked as 'It portrays my region/Scotland/Wales/Northern Ireland well to the rest of the UK'



## 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 (2007 = 7105 , 2010 = 6909, 2011 = 3079)  
 \*NB: Before 2011 the last statement asked as: 'It shows *enough* new programmes made in the UK'



## Fig 9 Summary of the importance and delivery of PSB purposes and characteristics 2011

Purposes	Importance	Delivery
Its news programmes are trustworthy	81%	62%
Its programmes help me understand what's going on in the world today	78%	61%
Its regional news programmes provide a wide range of good quality news about my area	76%	58%
It shows interesting programmes about history, sciences or the arts	65%	46%
It portrays my region/Scotland/Northern Ireland/Wales fairly to the rest of the UK	63%	43%
Its programmes show different kinds of cultures within the UK	58%	43%
It shows high quality soaps or dramas made in the UK	53%	46%
Characteristics		
It shows well-made, high quality programmes	78%	59%
It shows programmes I want to watch	76%	52%
it shows programmes that make me stop and think	67%	43%
It shows new programmes, made in the UK	67%	47%
It shows programmes with new ideas and different approaches	65%	44%

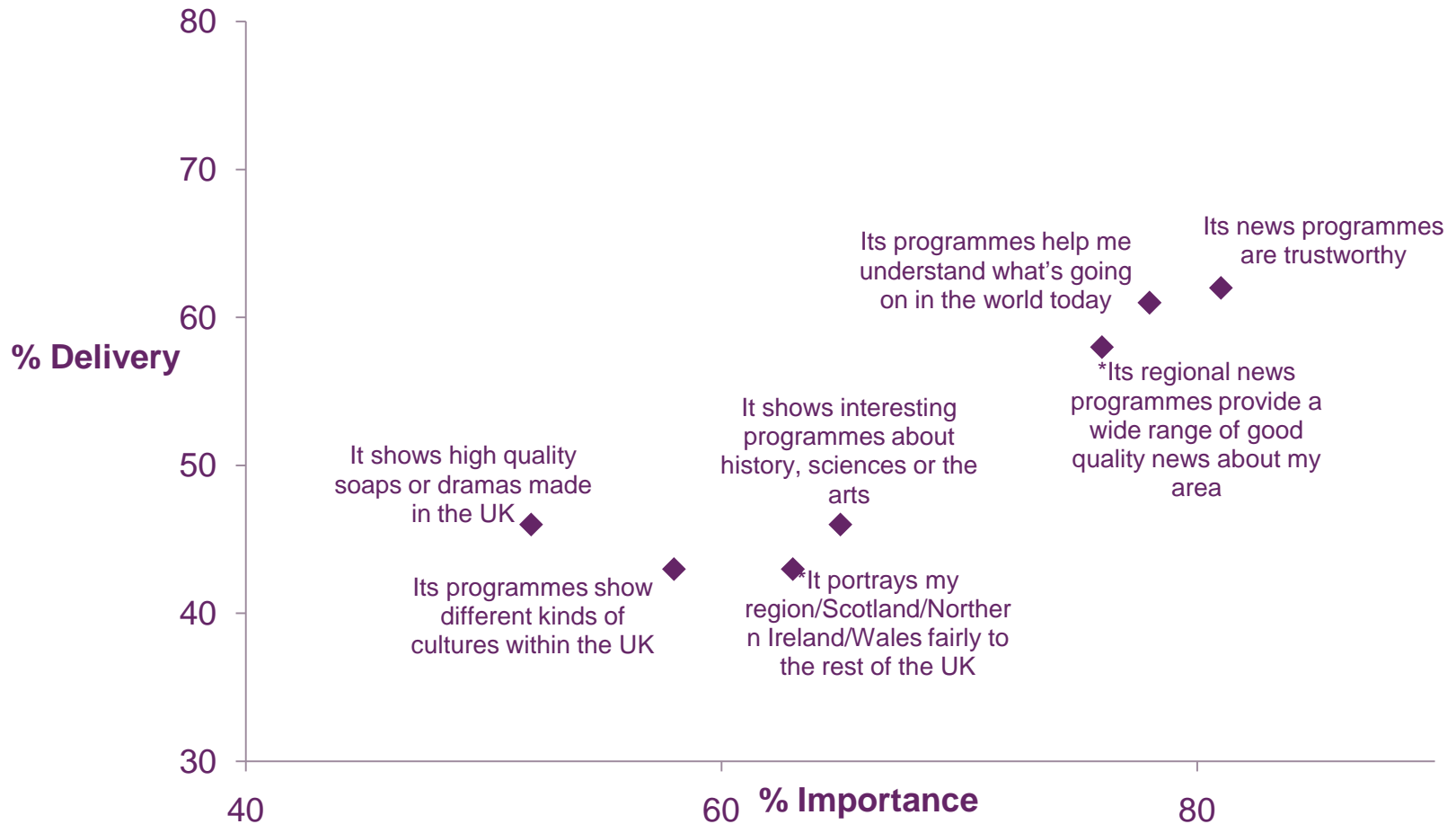
Summary % of respondents rating Importance/Delivery 10/9/8/7

Base for Importance: All (3109); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (3079)

Slightly amended wording of some statements 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'; 'It shows *enough* new programmes, made in the UK';



**Fig 10 Summary of the importance and delivery of PSB purposes**



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

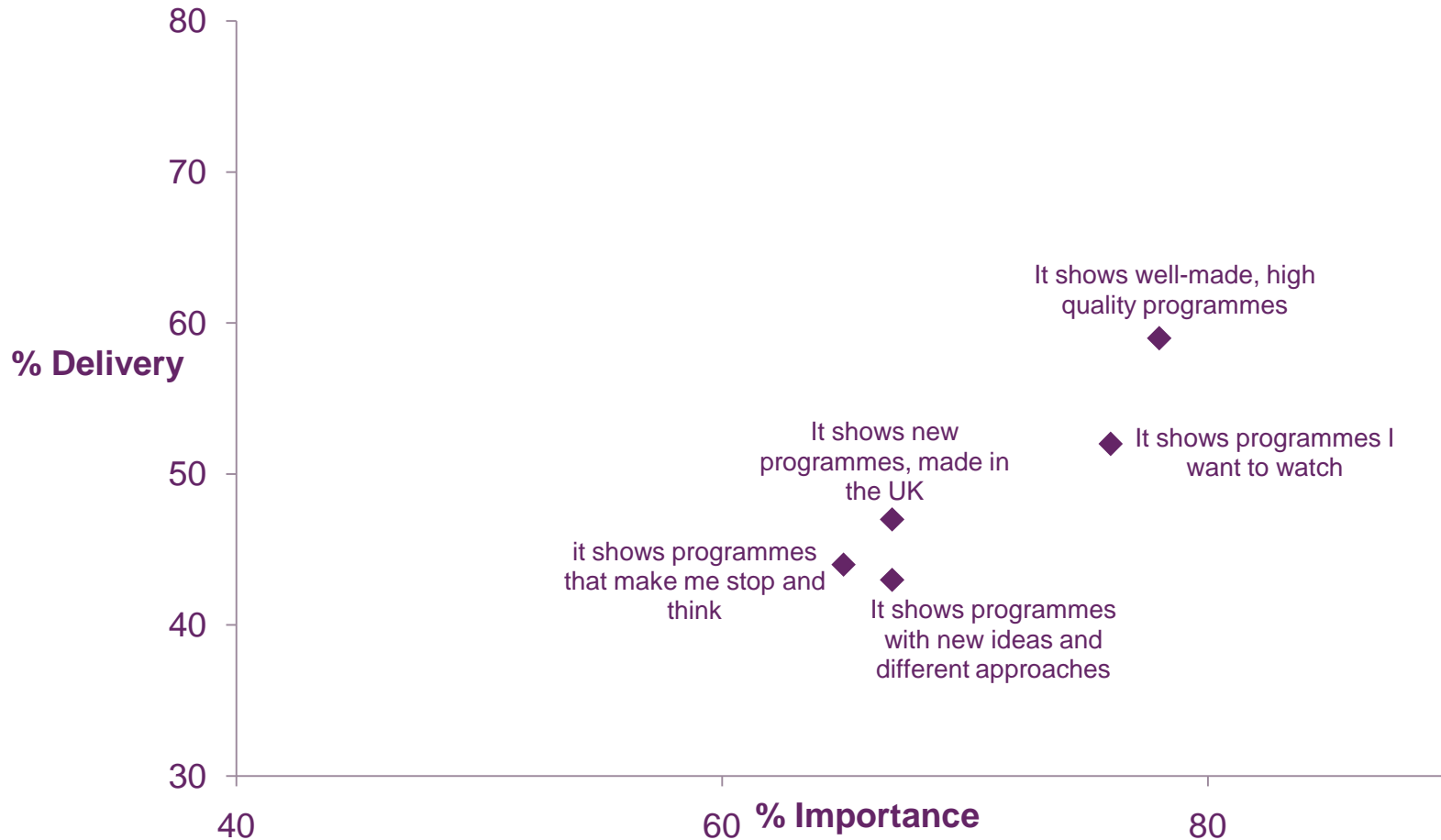
Base for Importance: All (3109); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (3079)

Slightly amended wording of some statements 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'; 'It shows enough new programmes, made in the UK';





**Fig 11 Summary of the importance and delivery of PSB characteristics**



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

Base for Importance: All (3109); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (3079)

Slightly amended wording of some statements 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'; 'It shows enough new programmes, made in the UK';

## PSB Nations and regions news

## PSB nations/regions news

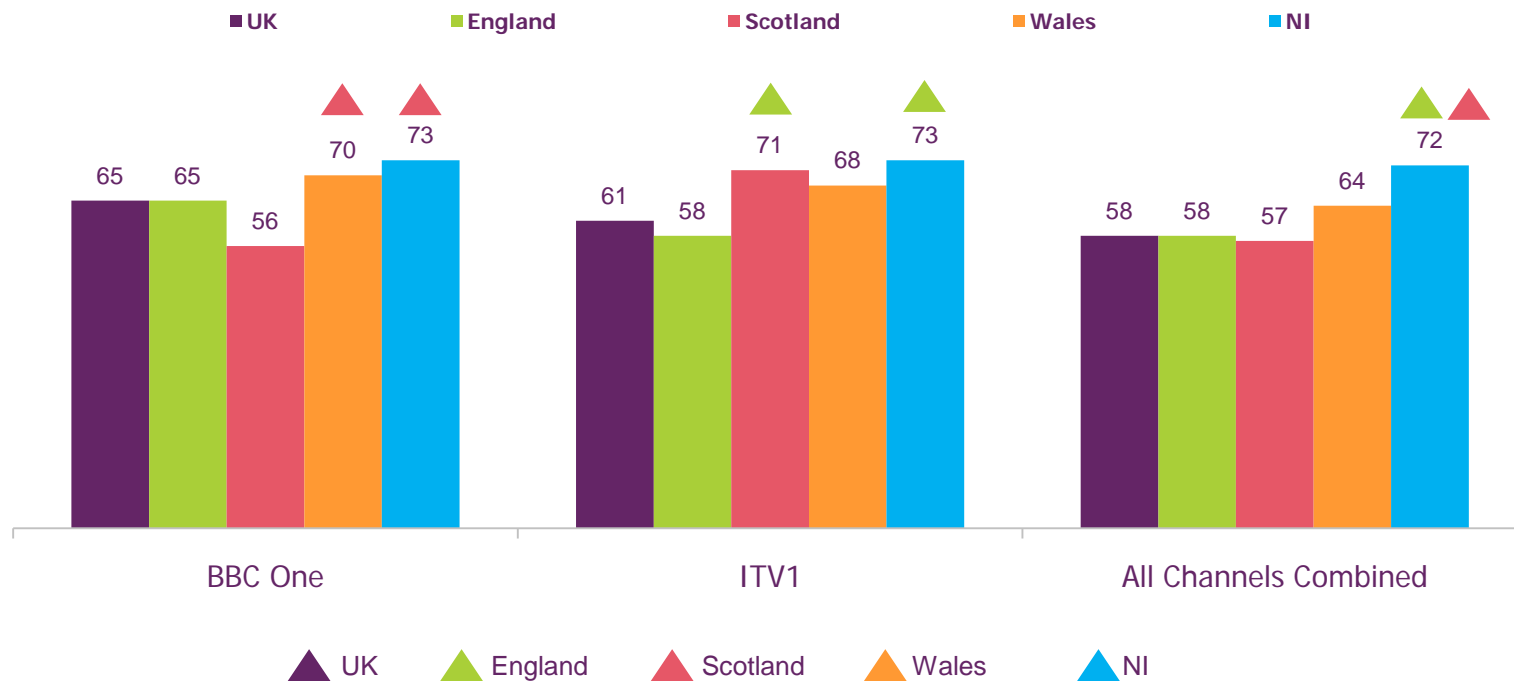


- The focus of this section is on opinion of PSB nations/regions news programming in the UK nations, which is reflected in the statement *'it's regional news programmes provide a wide range of programmes about my area'*.
- This statement is one element of Purpose 1 – *'to inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas'*.

### 2011

- Views in the nations about the provision of nations/regions news vary:
  - All Channels Combined
    - NI rates delivery significantly higher than England and Scotland do
  - BBC One
    - Wales and NI rate delivery significantly higher than Scotland
  - ITV1
    - Scotland and NI rate delivery significantly higher than England

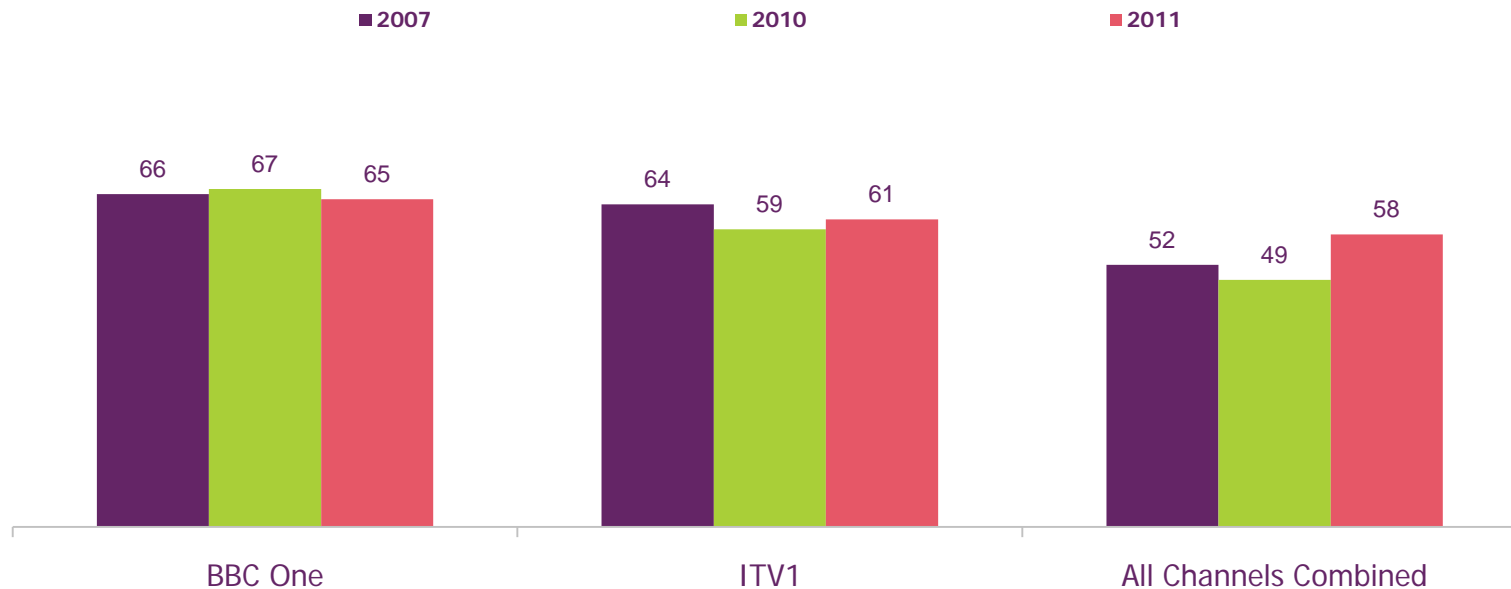
**Fig 12 'Its regional news programmes provide a wide range of good quality news about my area' – 2011 split by nation**



Shows direction of significant differences between nations for BBC One/ITV1/All channels combined, 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 =1597, 861, 234, 268, 234. ITV1 = 1107, 547, 189, 175, 196)  
 Base for 'All channels combined': All respondents who ever watch any PSB channels in each nation (3079, 1647, 499, 474, 459)  
 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'

**Fig 13 'Its regional news programmes provide a wide range of good quality news about my area'**



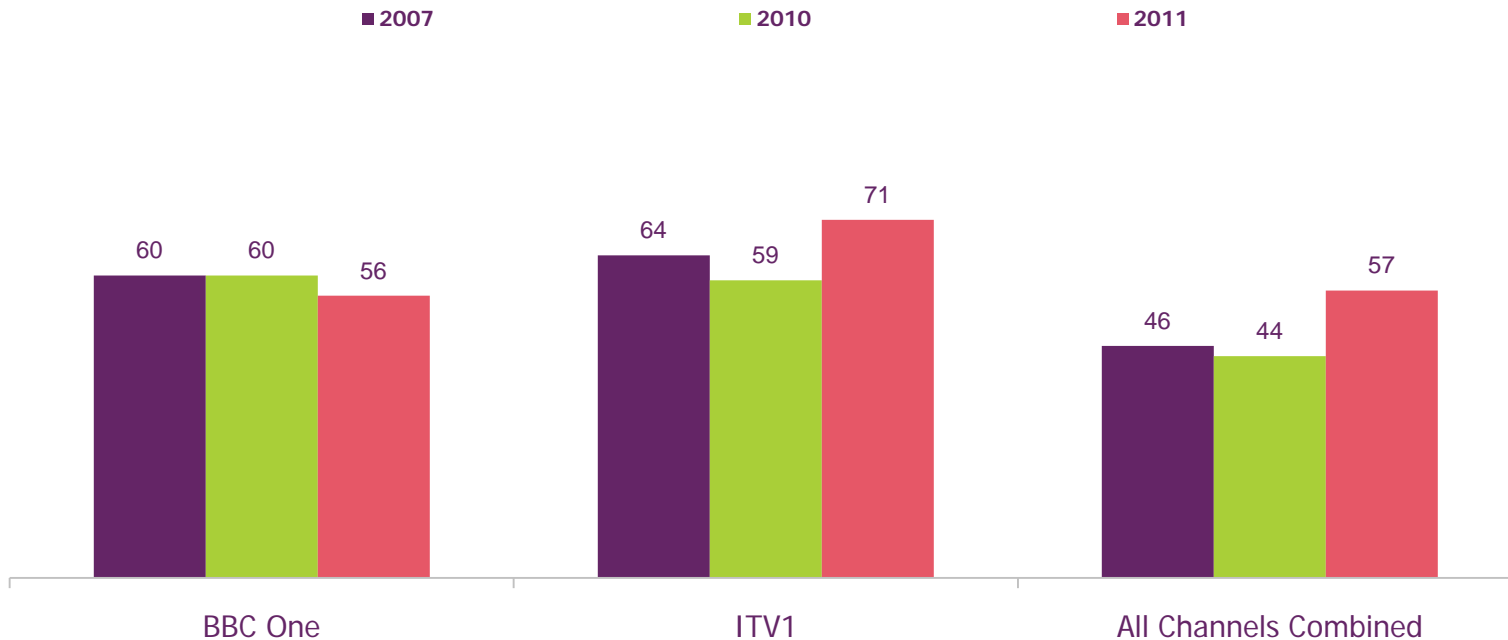
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel  
 Base for individual channels: Self-reported regular viewers of each channel (BBC One = 4906, 4998, 1597; ITV1 = 3724, 3518, 1107)  
 Base for 'All channels combined': All respondents who ever watch any PSB channels (7105, 6909, 3079)  
 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*'

**Fig 14 '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 = 2813, 2861, 861; ITV1 = 2039, 1944, 547)  
 Base for 'All channels combined': All respondents in England who ever watch any PSB channels (4062, 3942, 1647)

**Fig 15 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in Scotland)**



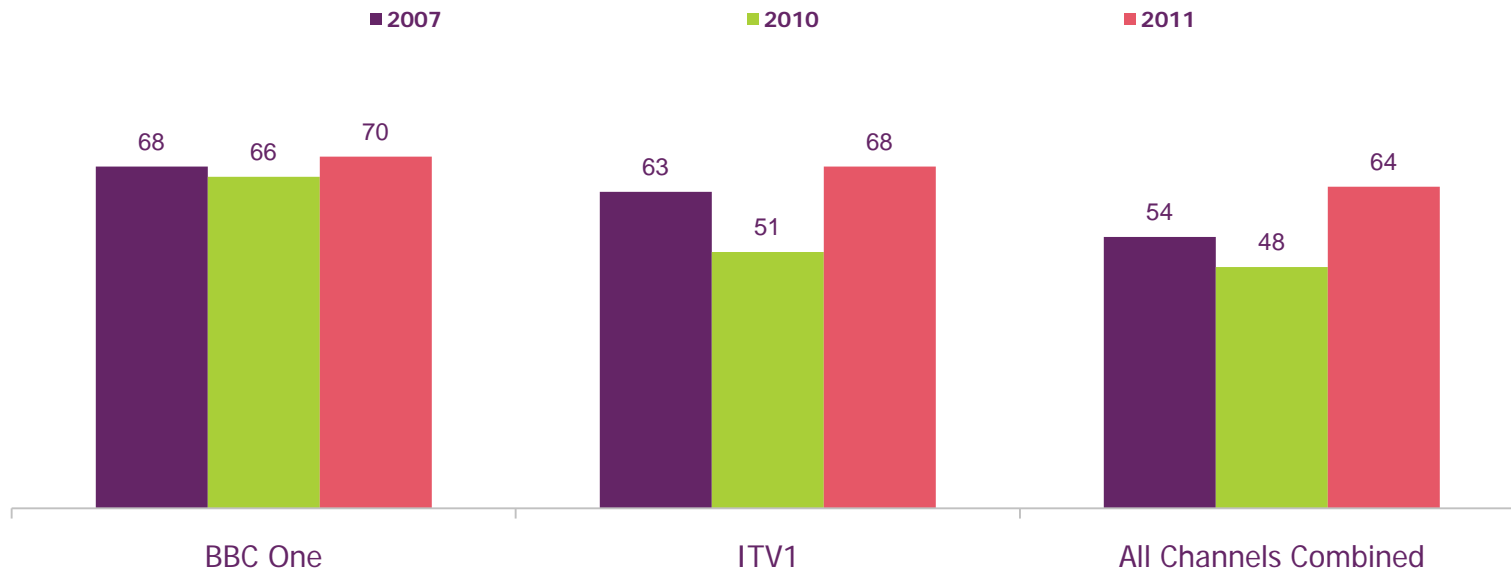
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-reported regular viewers of each channel in Scotland. (BBC One = 698, 698, 234; ITV1 = 534, 481, 189)

Base for 'all channels combined': all respondents in Scotland who ever watch any PSB channels (1022, 984, 499)

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'

**Fig 16 '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

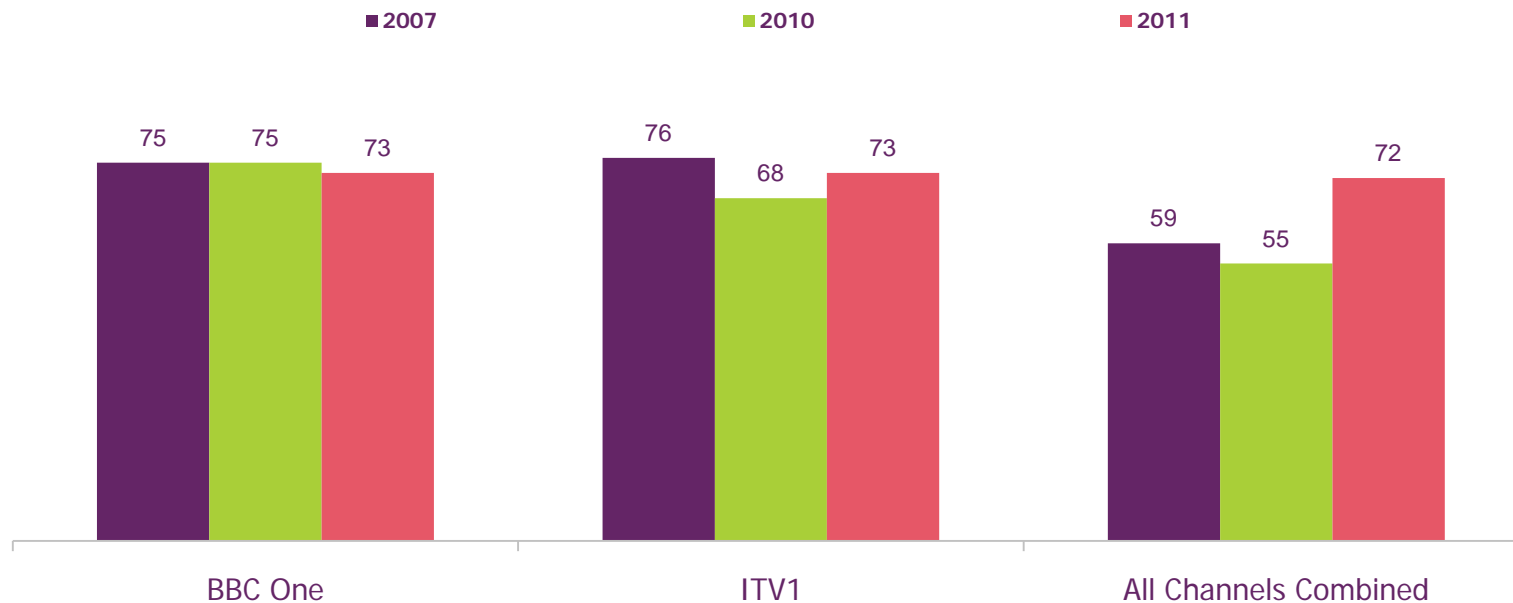
Base for 'all channels combined' : All respondents in Wales who ever watch any of the nine channels (1006, 996, 474)

Base for individual channels: Self-reported regular viewers of each channel in Wales. (BBC One = 744, 758, 268; ITV1 = 568, 511, 175)

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'



**Fig 17 '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 = 683, 681, 234; ITV1 = 583, 582, 196)

Base for 'all channels combined': All respondents in Northern Ireland who ever watch any PSB channels (1015, 987, 459)

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'

## Individual PSB channel summaries

## PSB channel summaries (1)



- The following charts summarise audience opinion of the delivery of each of the purposes and characteristics for the five main PSB channels among regular viewers of each channel. This section also includes the importance of a number of selected statements for both ITV1 and Channel 5 are also rated, by all respondents.
- Across all measures overall, BBC One scored the highest on average (62%), and Channel 5 scored the lowest (36%).
- BBC One didn't score less than 50% for any measure.
- Channel 5 didn't score more than 50% for any measure.
- Chanel 4 had the most consistent scores across all the measures it was rated upon.
- Three statements tended to score higher across the channels: *News programmes are trustworthy*, *Helps me understanding what's going on in the world*, *Shows well-made high quality programmes*.
- The highest individual rating (80%) was for BBC Two on the statement *Shows well-made, high quality programmes*.
- The lowest individual ratings (both 26%) were for Channel 5 on two statements, *It shows interesting programmes about science, history or the arts* and *It portrays my region fairly to the rest of the UK*.

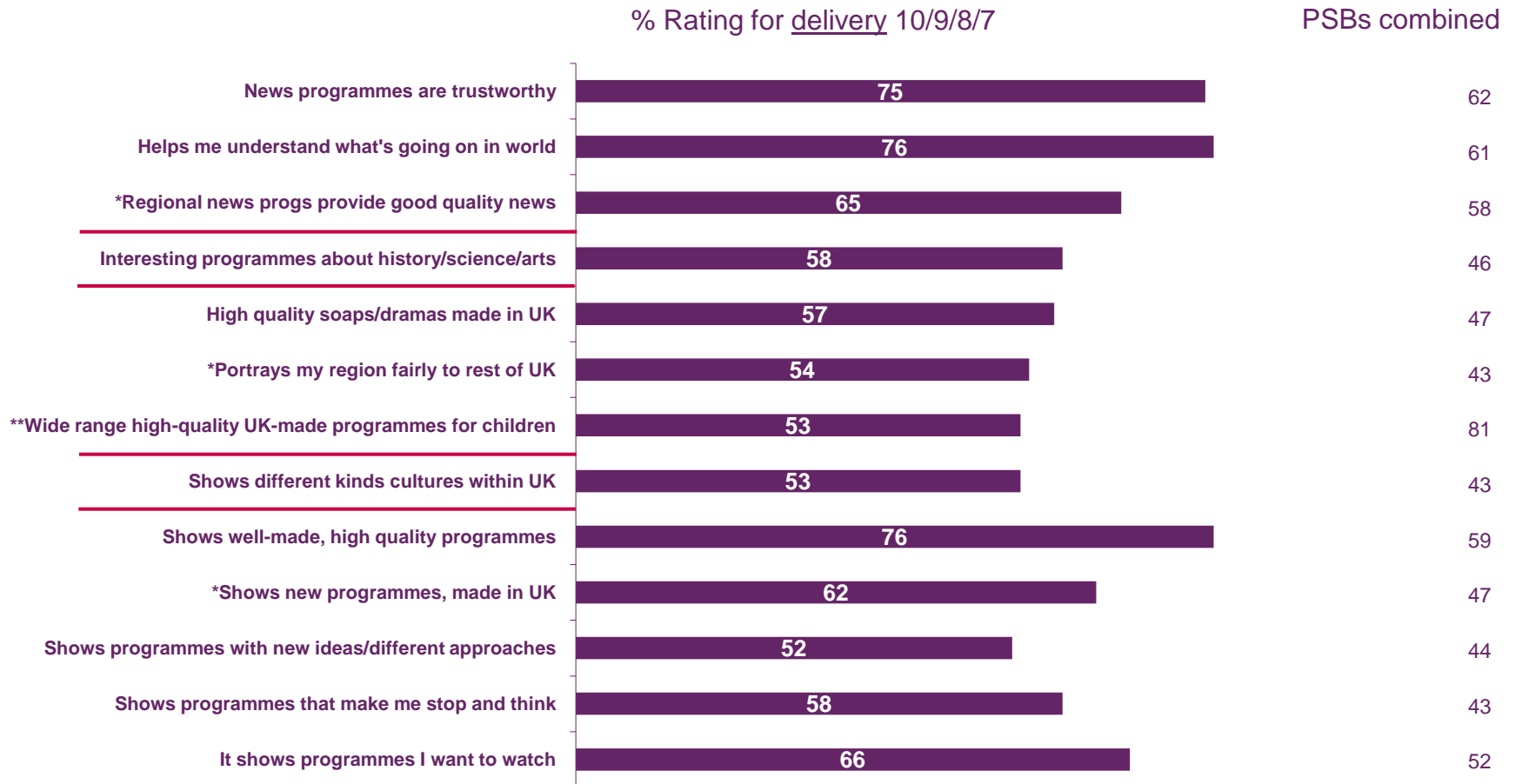
## PSB channel summaries (2)



- The importance of a number of selected statements for both ITV1 and Channel 5 are also rated.
- *“News programmes are trustworthy”* was the most important statement for both ITV1 (67%) and Channel 5 (51%).
- Measures for ITV1 were rated as more important than for Channel 5.
- ITV1’s lowest score for importance was 52%, for *“High quality soaps/dramas made in the UK”*. (Channel 5’s highest score was 51%).
- Channel 5’s lowest score was *“Helps me understand what’s going on in the world today”* (43%).



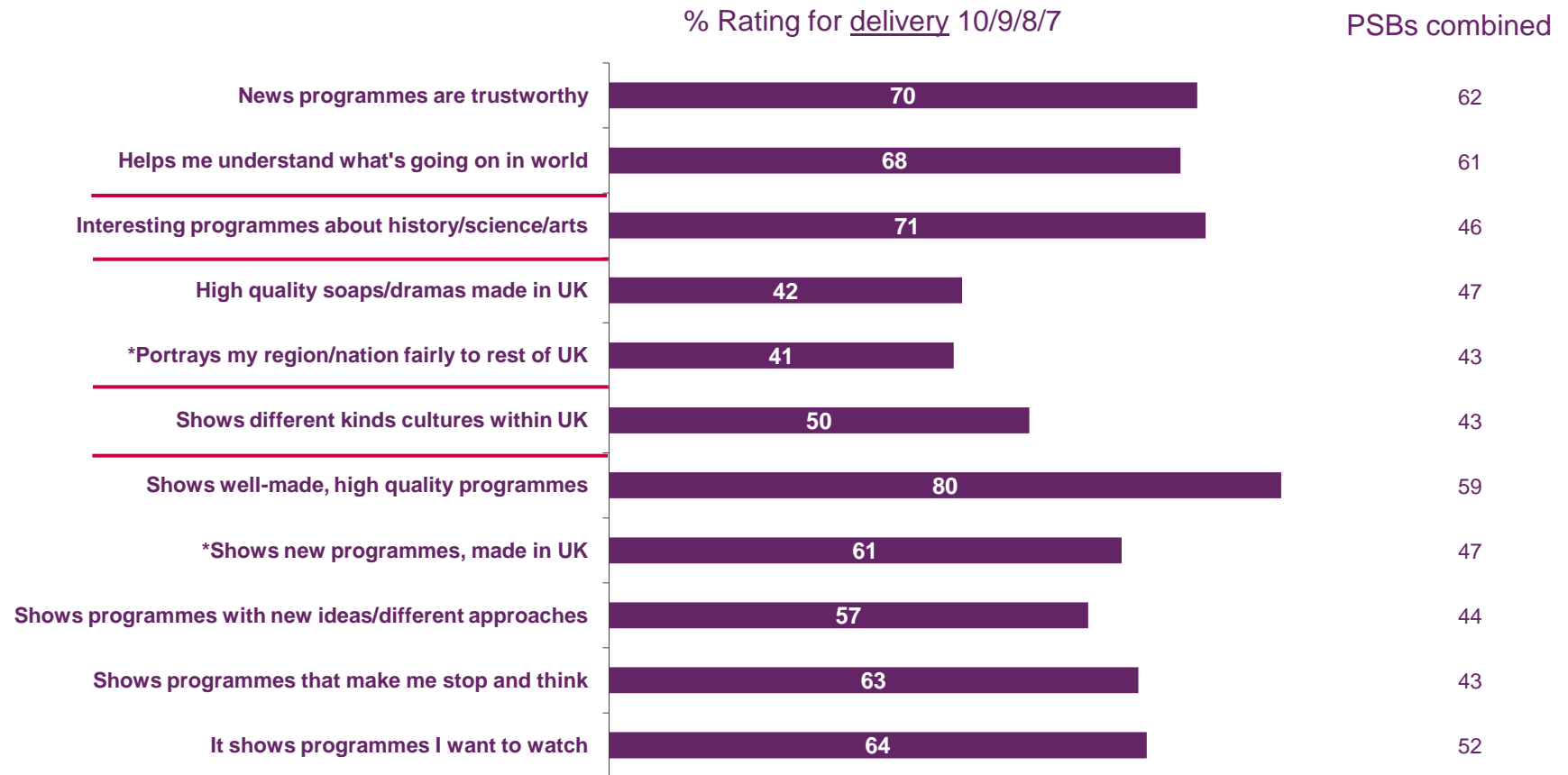
## Fig 18 BBC One



Base: Self-reported regular viewers of BBC One (1597)

\*Slightly amended wording of statements since 2011 . \*\*This statement was only rated by parents of children that watch children's shows on BBC One

## Fig 19 BBC Two

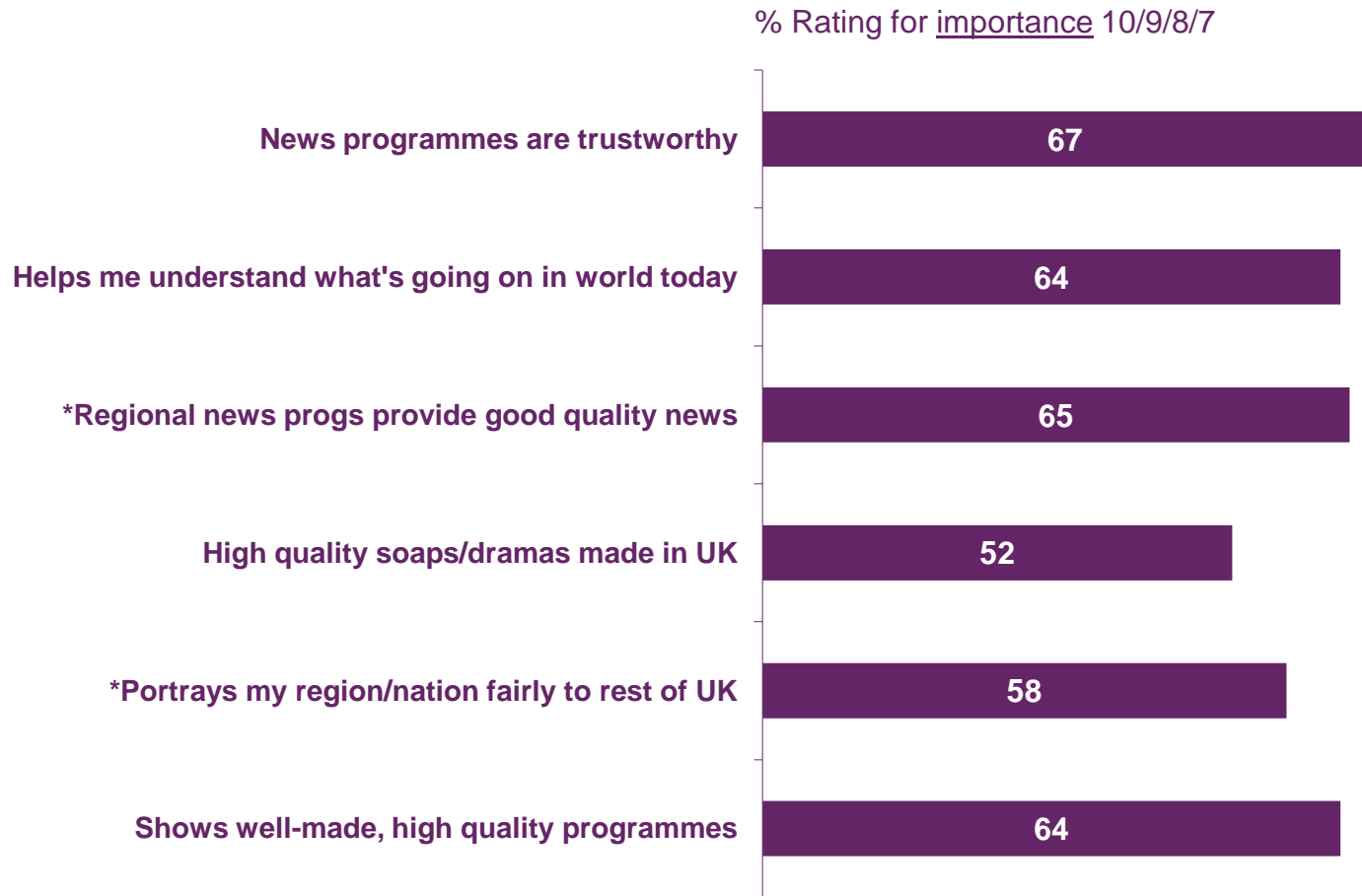


Base: Self-reported regular viewers of BBC Two (633)

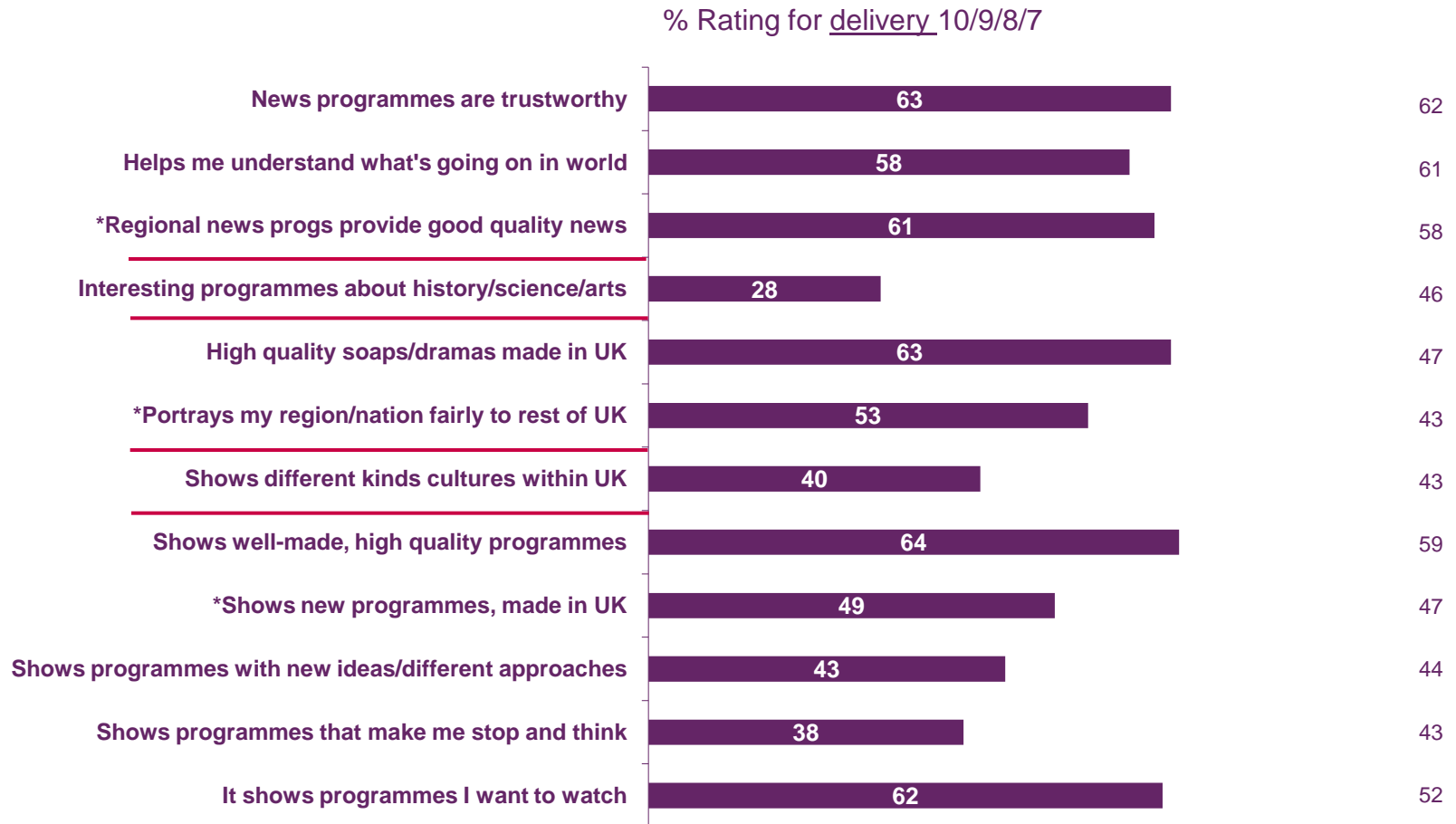
\*Slightly amended wording of statements since 2011



**Fig 20 ITV1 – the importance of ITV1 providing the following PSB purposes**



## Fig 21 ITV1

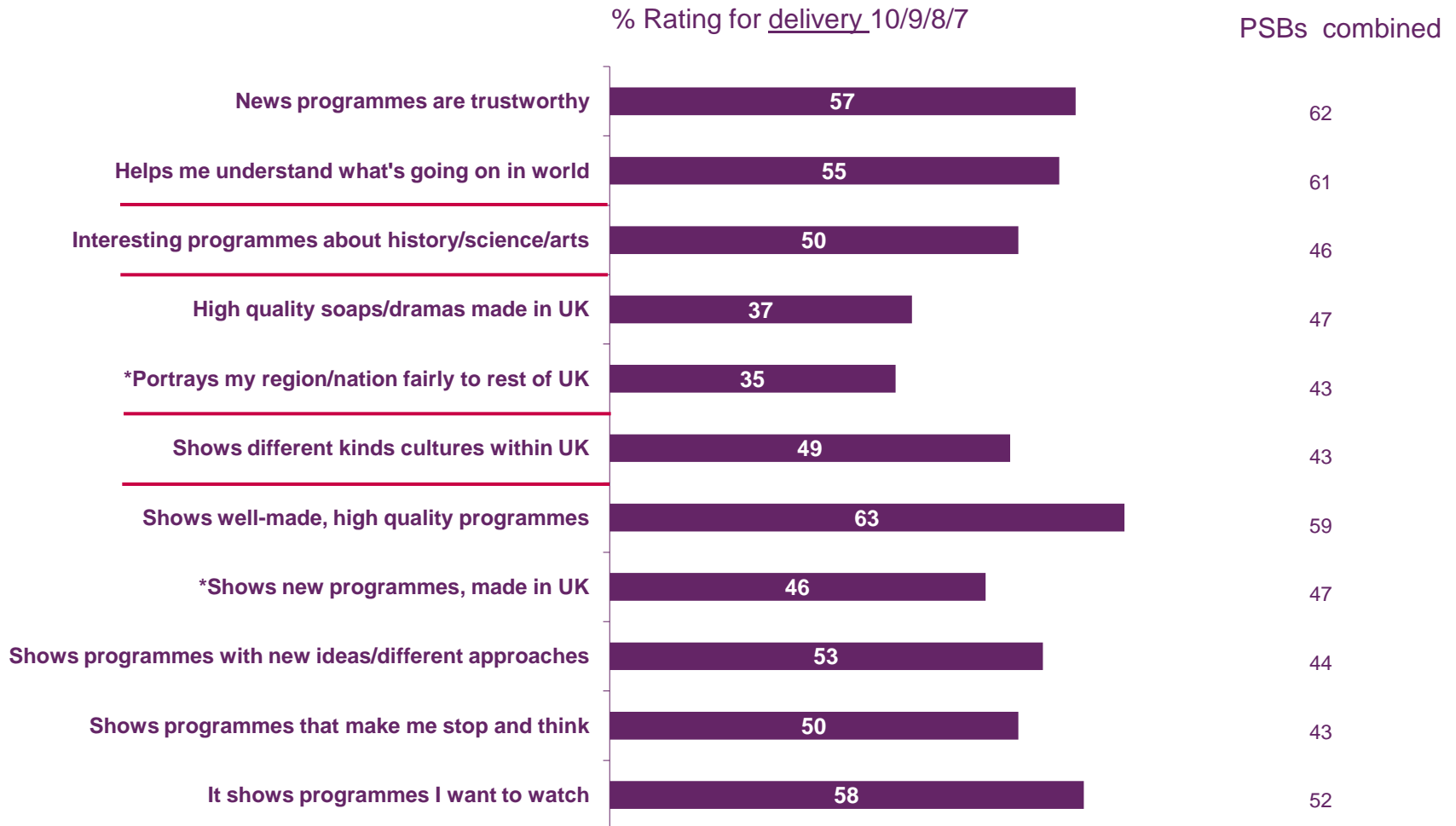


Base: Self-reported regular viewers of ITV1 (1107)  
 \*Slightly amended wording of statements since 2011





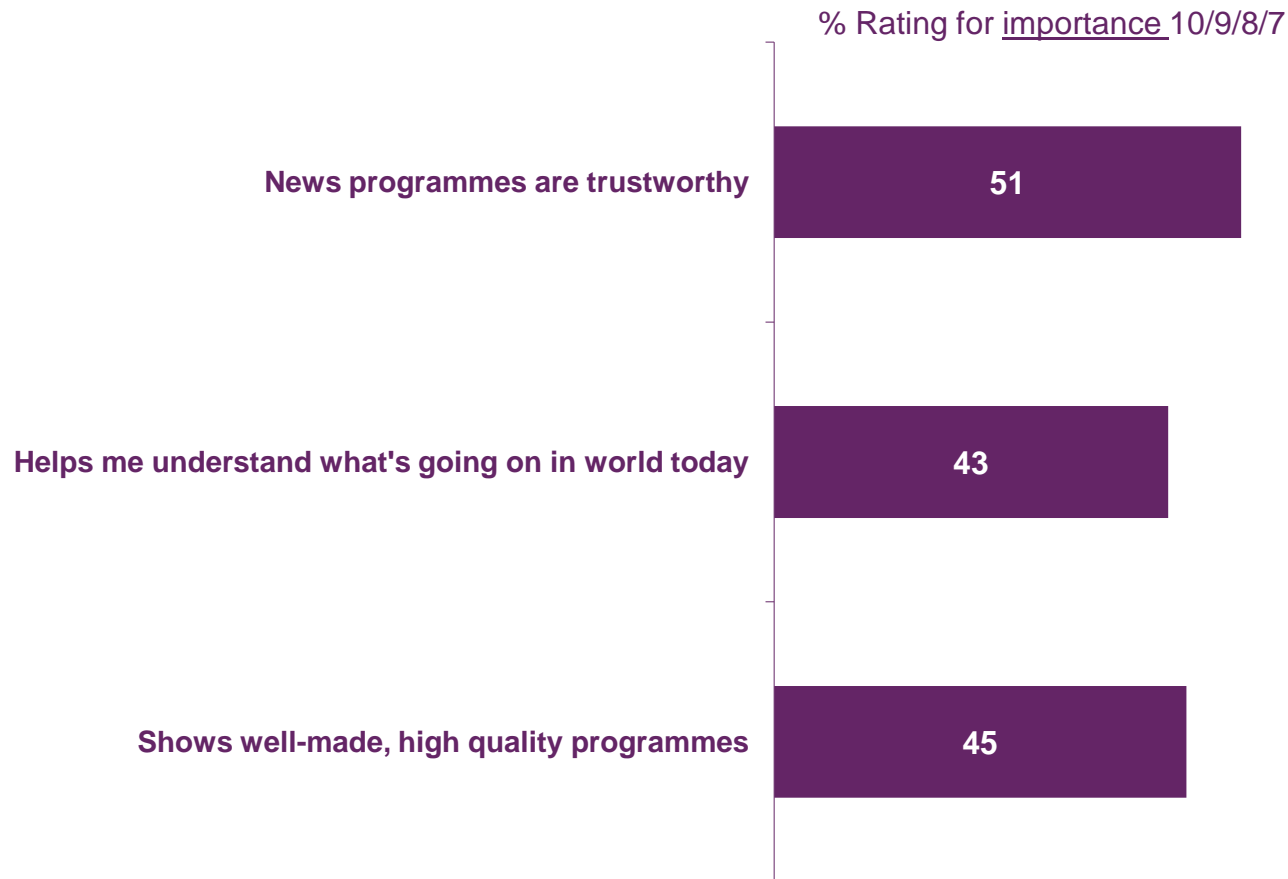
## Fig 22 Channel 4



Base: Self-reported regular viewers of Channel 4 (599)

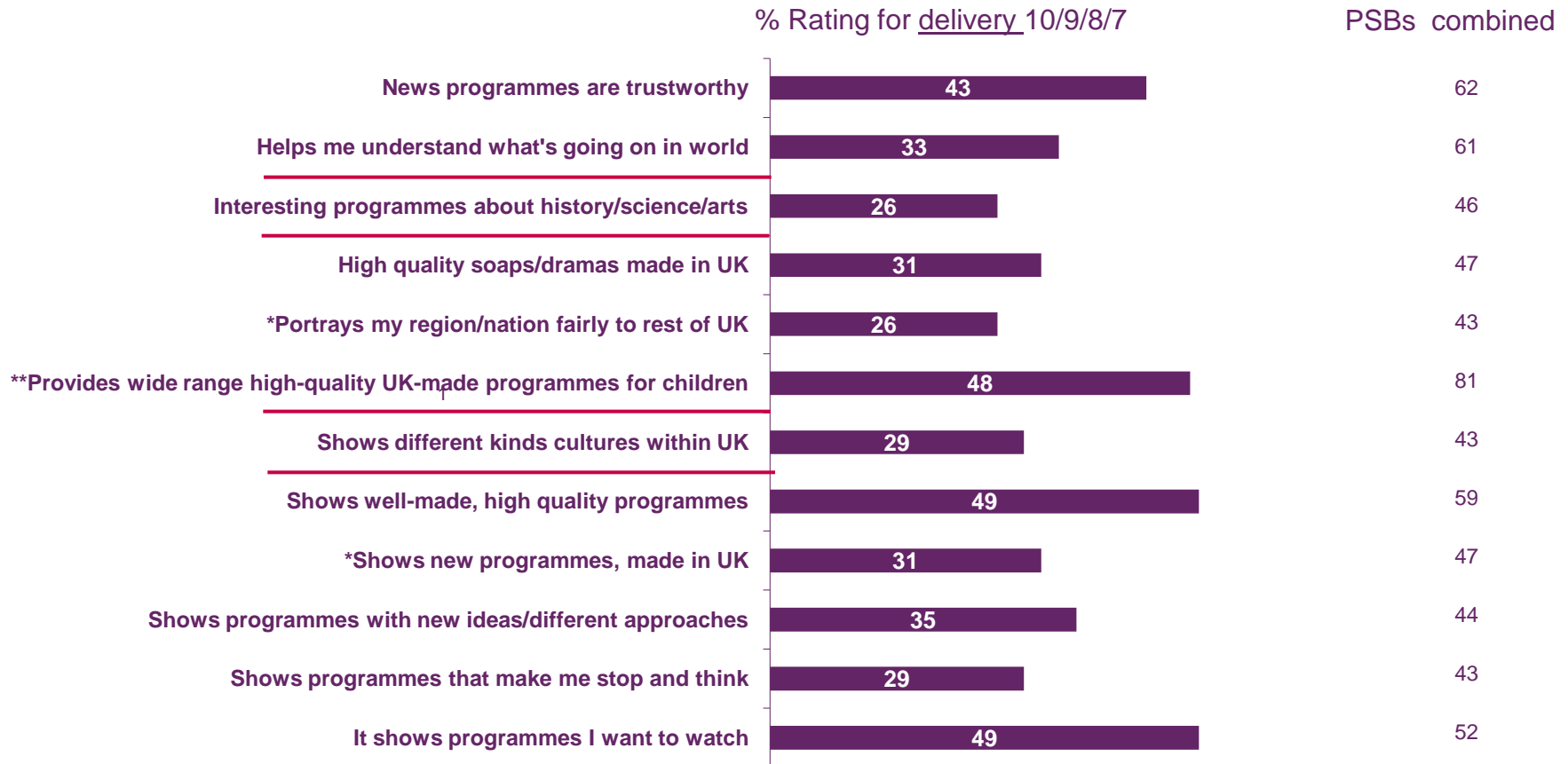
\*Slightly amended wording of statements since 2011

Fig 23 Channel 5 – the importance of Channel 5 providing the following PSB purposes





## Fig 24 Channel Five



Base: Self-reported regular viewers of Channel Five (345)

\*Slightly amended wording of statements since 2011. \*\*This statement was only rated by parents of children that watch children's shows on Channel 5

## Summary: S4C (1)

The Welsh Authority had the statutory responsibility to provide S4C Digidol (digital) services for viewers in Wales.

The Communications Act specifies that the S4C services must include News and Current Affairs programming, hence fewer Purposes are asked about.

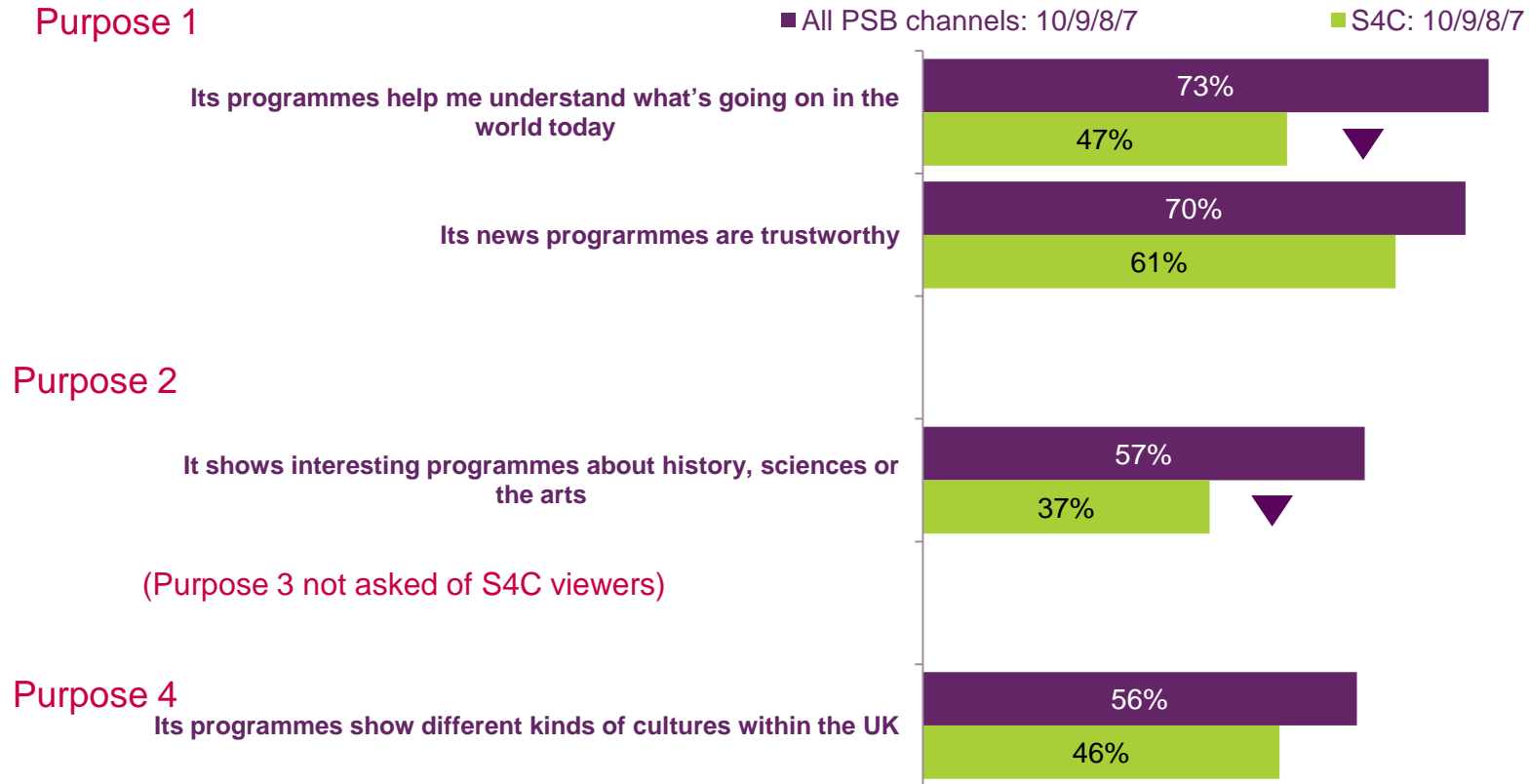
- In order to provide relevant information about audience views relating to S4C programming in Welsh, the PSB Tracker has been boosted in Wales since January 2006. Opinions are based on *regular viewers of S4C*. The PSB Tracker results reported here are based on the Welsh boost sample.
- The PSB Tracker asks 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 PSB channels together are required to deliver the range of purposes and characteristics, rather than any channel alone. However, the remit of S4C and its role in a devolved nation mean that opinions relating to purpose 1 *informing our understanding of the world* are particularly relevant.

## Summary: S4C (2)

### Key themes

- For regular viewers of S4C Welsh language programming in 2011, for most measures it did not score significantly differently from all PSB channels as a whole.
- There were two measure where it did score significantly lower. Nearly three-quarters (73%) agreed that the channels as a whole "*help me understand what's going on in the world today*" compared to under half (47%) when asked about S4C.
- Similarly, when asked about the channels as a whole, 57% agreed that "*It shows interesting programmes about history, sciences or the arts*", compared to 37% with regard to S4C alone.

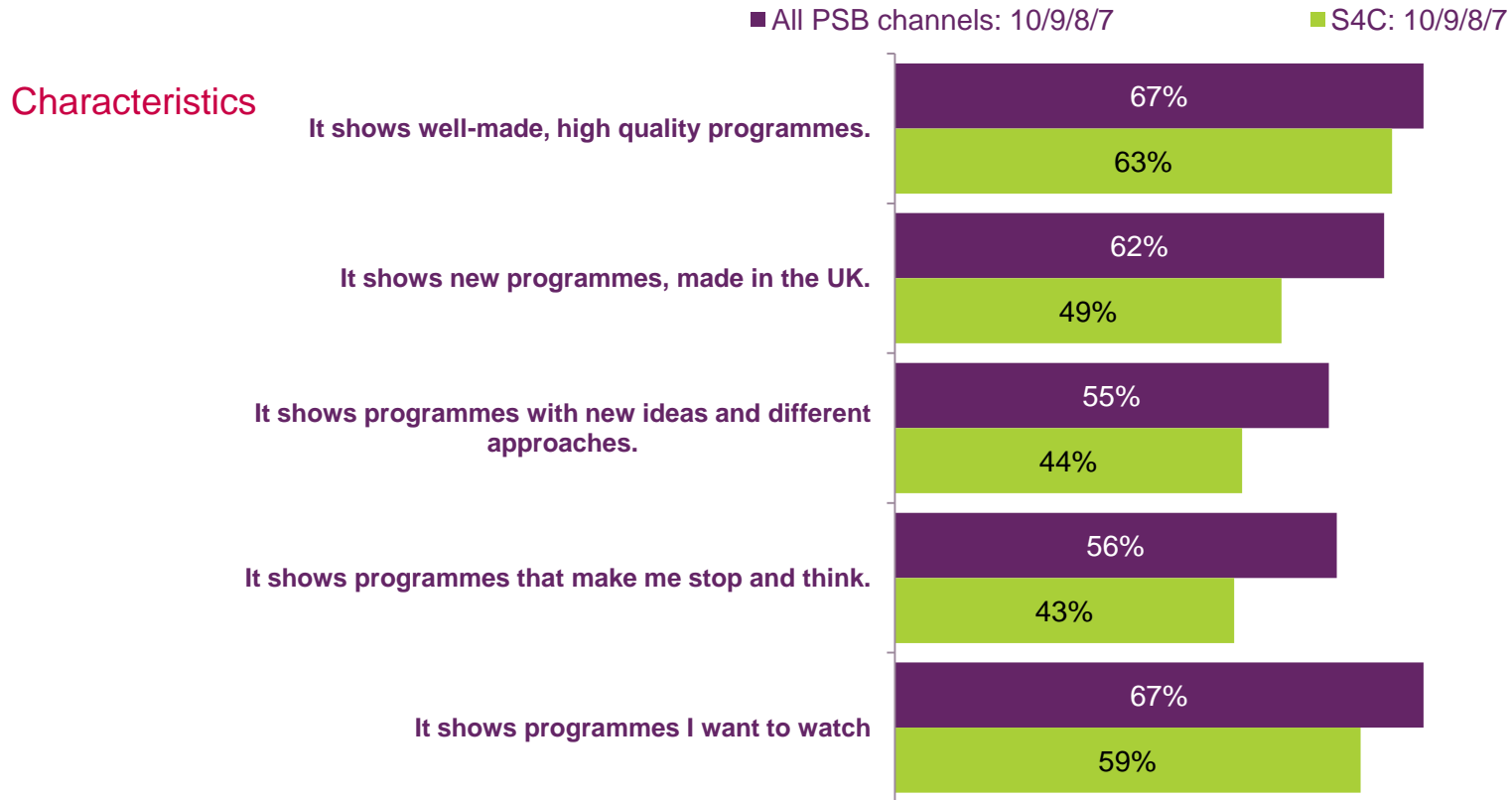
**Fig 25 Welsh language viewer opinions of delivery of PSB purposes, 2011**



▼ Shows significant differences between attitudes to S4C vs all PSB channels, 99% level

Extent to which the characteristic applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all'  
 Base: Self-reported regular viewers of S4C (150)

**Fig 26 Welsh language viewer opinions of delivery of PSB characteristics, 2011**



No significant differences between attitudes to all PSB channels vs S4C, 99% level

Extent to which the characteristic applies to the channel(s) , where 10 means 'applies completely' and 1 means 'does not apply at all'  
 Base: Self-reported regular viewers of S4C (150)

## Overall satisfaction with PSB



## Overall satisfaction with PSB (1)



- 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.
- Overall, 80% of those who ever watch any PSB channel claimed to be either quite or very satisfied with PSB broadcasting.
- Among the different age groups, satisfaction with PSB broadcasting in 2011 was higher among 16-24 year olds (84%) compared to respondents aged 45-54 years old (75%).
- Respondents in the AB social economic group claimed to be more satisfied than those in the DE social economic group.
- When asked their level of satisfaction compared to one year ago, 12% claim to have increased satisfaction. 18% of respondents claimed to be less satisfied versus the previous year.
- There were no significant differences by respondent's method of viewing.
- The most mentioned reason for increasing satisfaction was *“Better choice of programmes”* (21%).
- The most cited reason for declining satisfaction was *“Too many repeats”*, (27%), followed by *“They are boring / I do not find them interesting”* (15%) and *“Poor quality of programmes”* (13%).

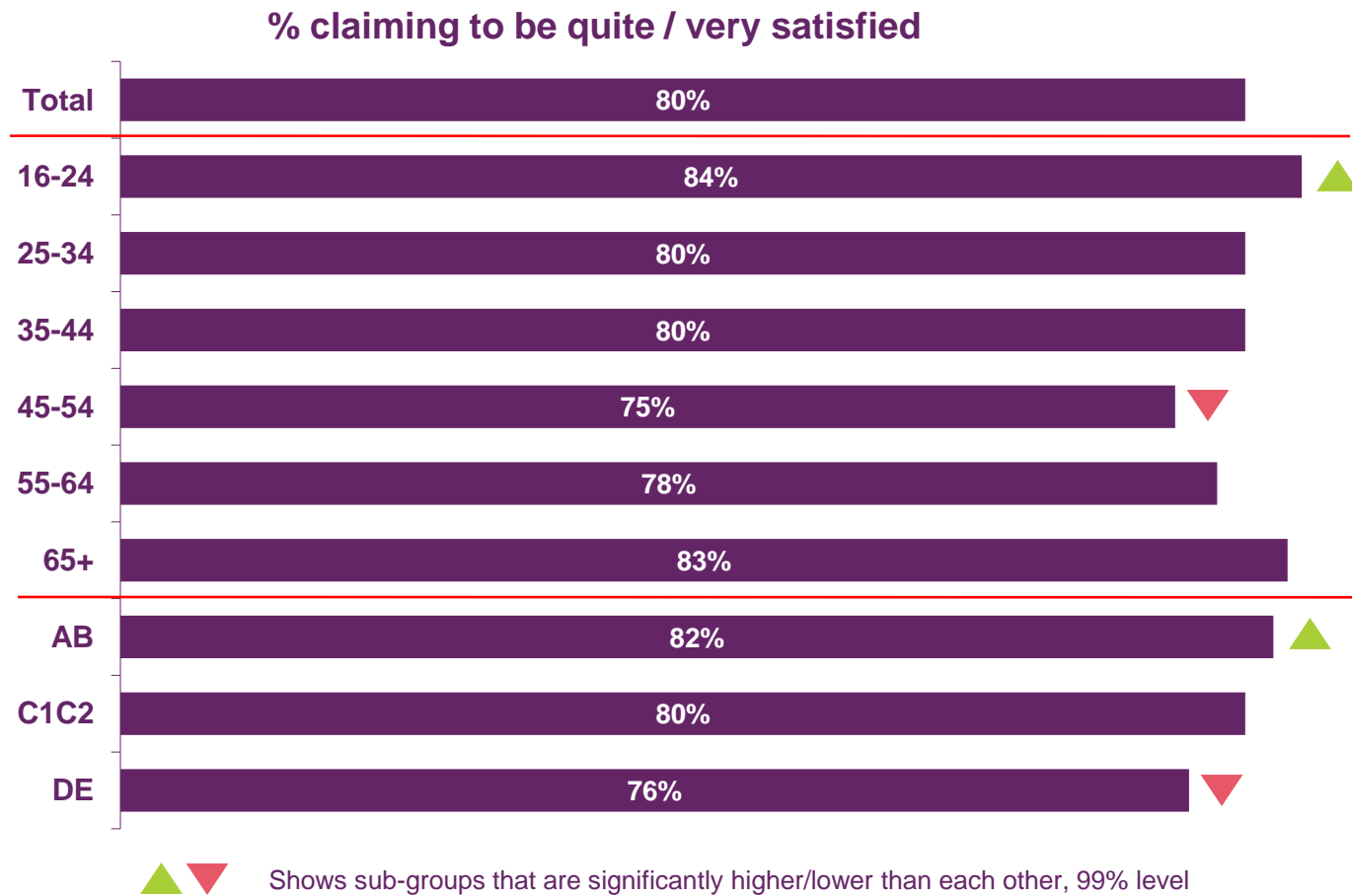
## Fig 27 Overall satisfaction with PSB over time



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 (2007 = 7105, 2010 = 6909, 2011 = 3079)

**Fig 28 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 (3079)

Male (1488); Female (1591); 16-24 (462); 25-34 (483); 35-44 (591); 45-54 (513); 55-64 (418); 65+ (612); AB (712); C1C2 (1512); DE (855)

## Fig 29 Overall satisfaction with PSB compared to one year ago



**12% more satisfied than last year**

When asked their level of satisfaction with the PSBs as a whole compared to one year ago, 12% said they were more satisfied.

**18% less satisfied than last year - stable**

Significantly more (18%) stated they were less satisfied than last year

*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 (3079)

## Fig 30 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
Too many repeats	27%
They are boring / I do not find them interesting	15%
Poor quality of programmes	13%
Too many reality programmes	7%
Not enough dramas/ films	7%
Because I need to pay TV licence / not worth it	4%
A lot of programmes are the same / similar	4%
Not enough informative/ educational programmes	4%
There are too many soaps	4%

All others 3% or under

Q. What makes you say this?

Bases: All less satisfied compared with last year (535)

## Fig 31 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.

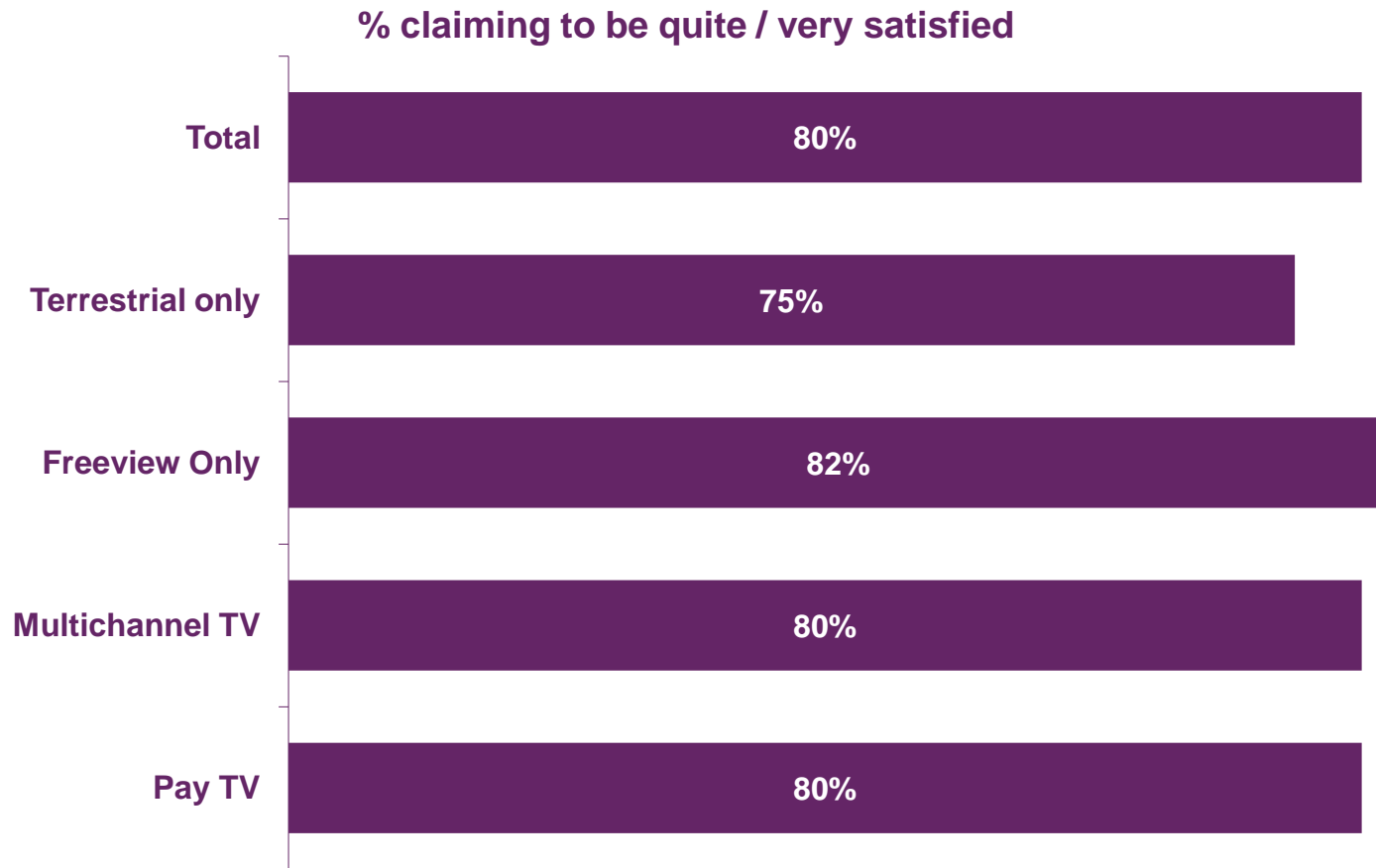
	All
Better choice of programmes	21%
More interesting programmes	15%
Better quality of programmes	10%
Programmes are more informative/relevant	6%
Better drama/films	5%
More channels	4%
More international/national coverage	4%
Like the news	3%
More channels are becoming appealing	3%

All others 2% or under

Q. What makes you say this?

Base: All more satisfied compared with last year (353)

## Fig 32 Overall satisfaction with PSB by viewing platform

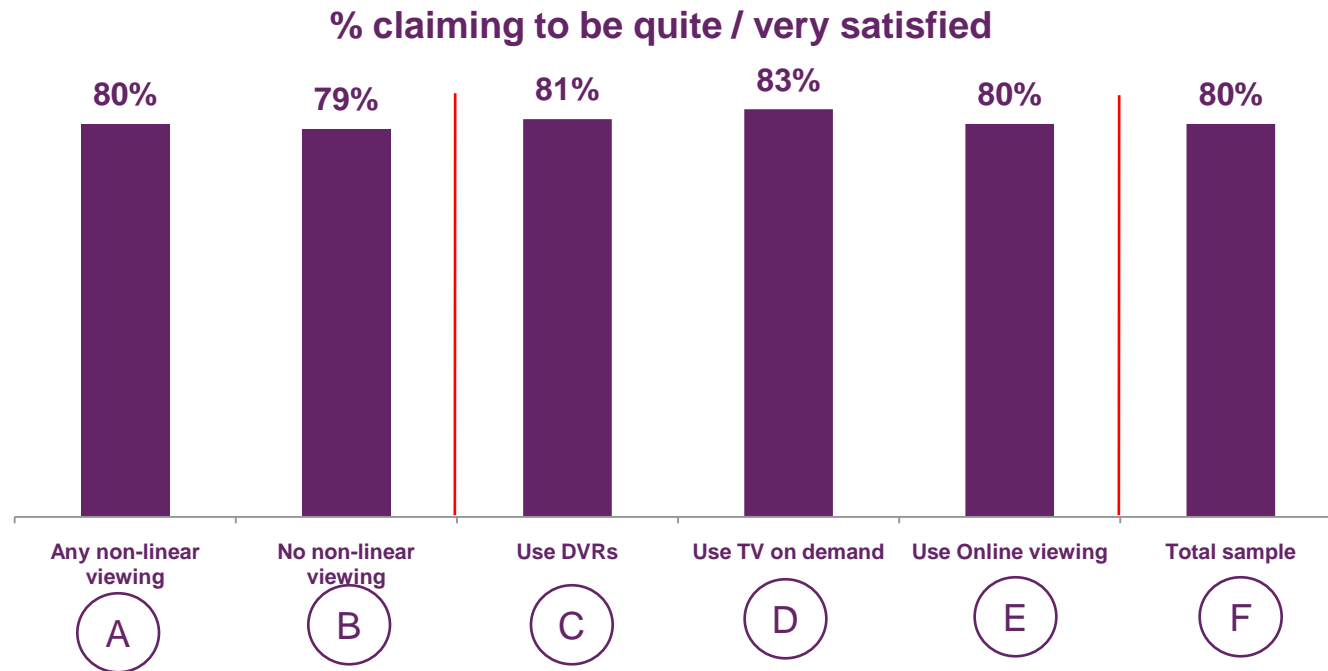


No significant differences (net satisfied) between any platform (99% level)

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 (3079)

## Fig 33 Overall Satisfaction with PSB by Linear Viewing and DVR Usage



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

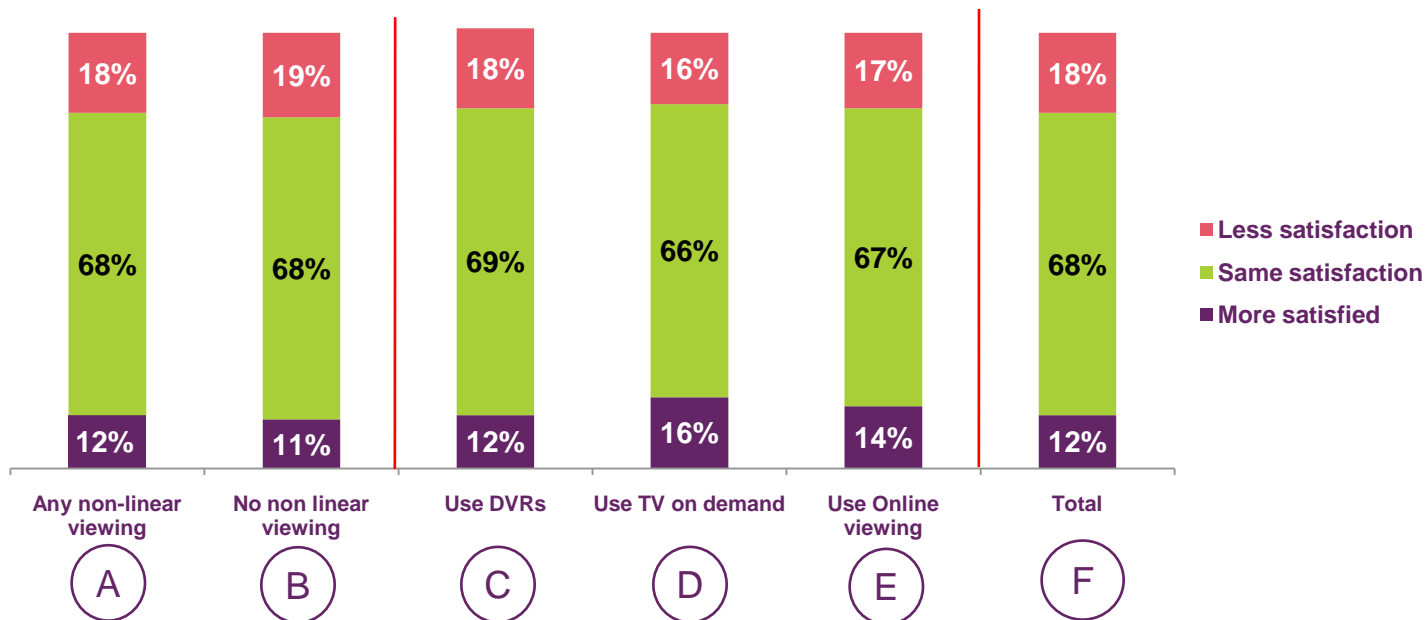
Q. And now, if you think about ALL THE channels combined - in other words the BBC channels, ITV1, S4C (WALES ONLY) and Channels 4 and Five - how satisfied are you that combined they provide these elements that we have talked about? (net satisfied shown here)

Base: All who ever watch any PSB channels: Any linear viewing (1960), No non-linear viewing (1119), Use DVRs (1322), Use TV on demand (455), Use Online viewing (802), Total (3079)



## Fig 34 Overall satisfaction with PSB compared to one year ago by linear viewing and non linear viewing

% claiming the same/increased satisfaction compared to one year ago



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: Any linear viewing (1960), No non-linear viewing (1119), Use DVRs (1322), Use TV on demand (455), Use Online viewing (802), Total (3079)

# Children's PSB

## Children's PSB (1)

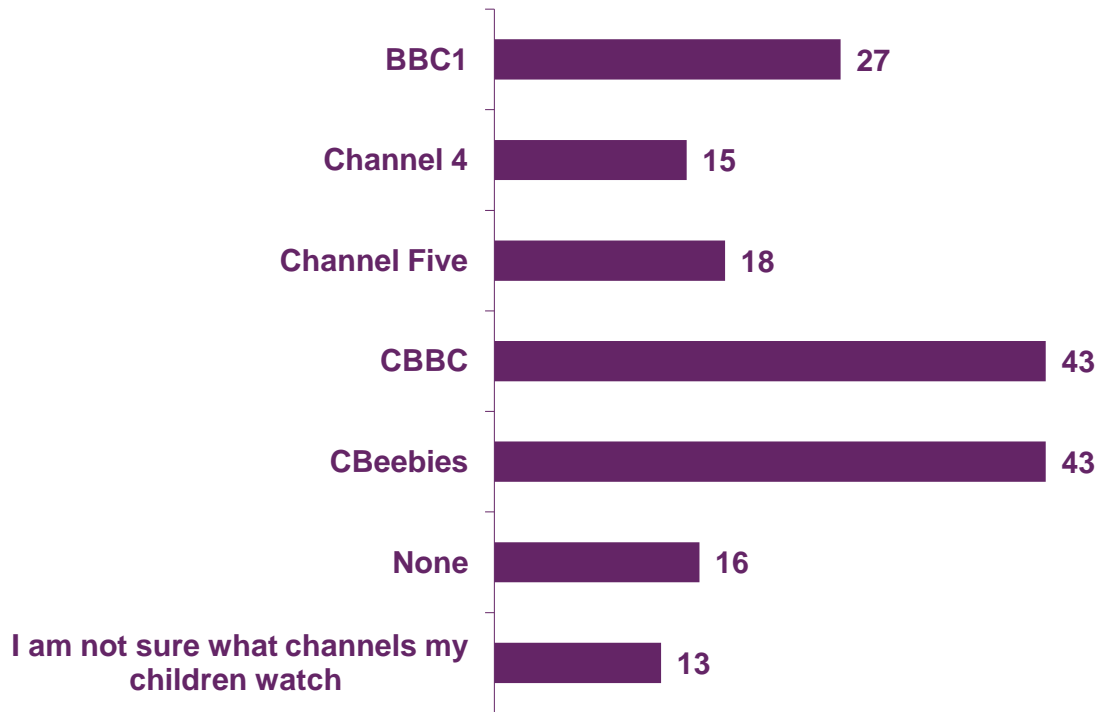


This section looks in detail at Children's PSB. Children's programming is broadcast on the five main PSB channels while dedicated children's channels are also available from the PSB broadcasters and commercial broadcasters via digital TV.

### Key themes

- CBBC and Cbeebies were significantly more likely to be viewed by children than the other channels broadcasting children's PSB content.
- Parents/carers of children under the age of 15 years rated the delivery of PSB children's programming as important (81%) .
- The dedicated children's channels, CBBC and CBeebies, received positive ratings (from the parents/carers of children regularly watching these) on "Provides a wide range of high-quality UK-made programmes for children"). In 2011 81% were satisfied with Cbeebies on this measure and a similar proportion (71%) were satisfied with CBBC.
- Among the other channels just over half of parents/carers of children watching BBC One were satisfied with it on this measure (53%), with 45% of those with children watching Channel 5 stating it delivered on this statement.
- Thinking about all the channels combined, 60% of parents whose children watched at least one of the channels were satisfied.
- Parents of children aged 12-15 that watch Channel 4 were asked to rate the channel, but the base size is small (under 100) so results should be viewer as indicative only.

**Fig 35 Proportion of UK sample's children that are regular viewers of children's PSB channel**



Q. On which of these channels does/do your child/children regularly watch programmes aimed specifically at children?  
 Base: All responsible for children under 16 (529)

## Fig 36 Parents' opinions on the importance of Childrens' PSB

'It provides a wide range of high quality, 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.

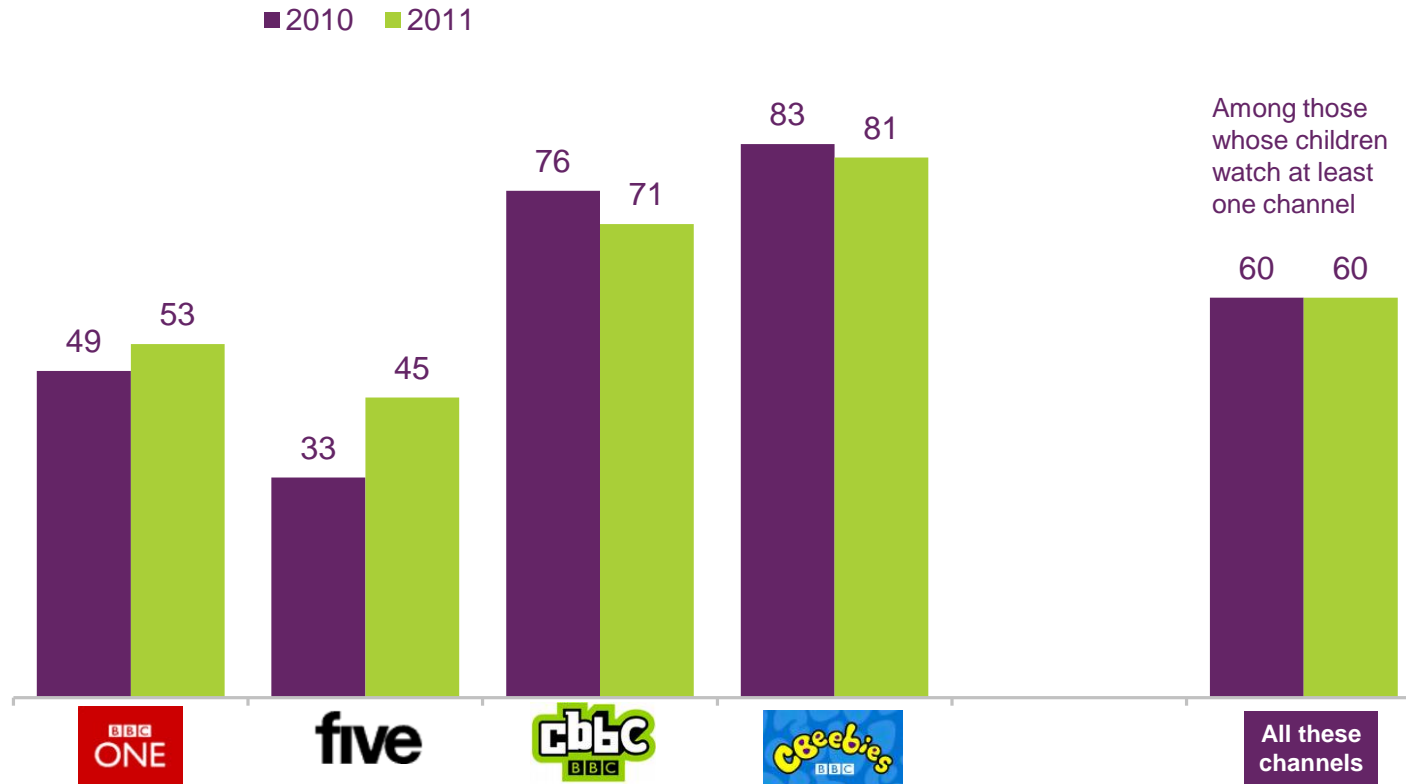
In 2010 channels asked about were BBC One, BBC Two, ITV1, Channel 4, Five, Cbeebies and CBBC. In 2011 BBC Two, ITV1 and Channel 4 were not included.

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

Base: 2010 – All in Sample A (3569); 2011 – All whose children regularly watch any of those channels BBC One, Channel 5, CBeebies, CBBC, S4C regularly (363)

## Fig 37 Parents' opinions on the delivery of Children's PSB

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



Note: Asked of more channels prior to 2011

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 (1448, 363)

Base for individual channels: Those whose children are regular viewers of each channel featured (CBBC = 805,180 CBeebies = 782, 218 BBC One = 906, 155 Channel Five = 574, 89)

## Fig 38 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

Importance rating

65

Delivery

44

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) – CAUTION SMALL BASE SIZE

# Digital channels



## Digital channel summaries

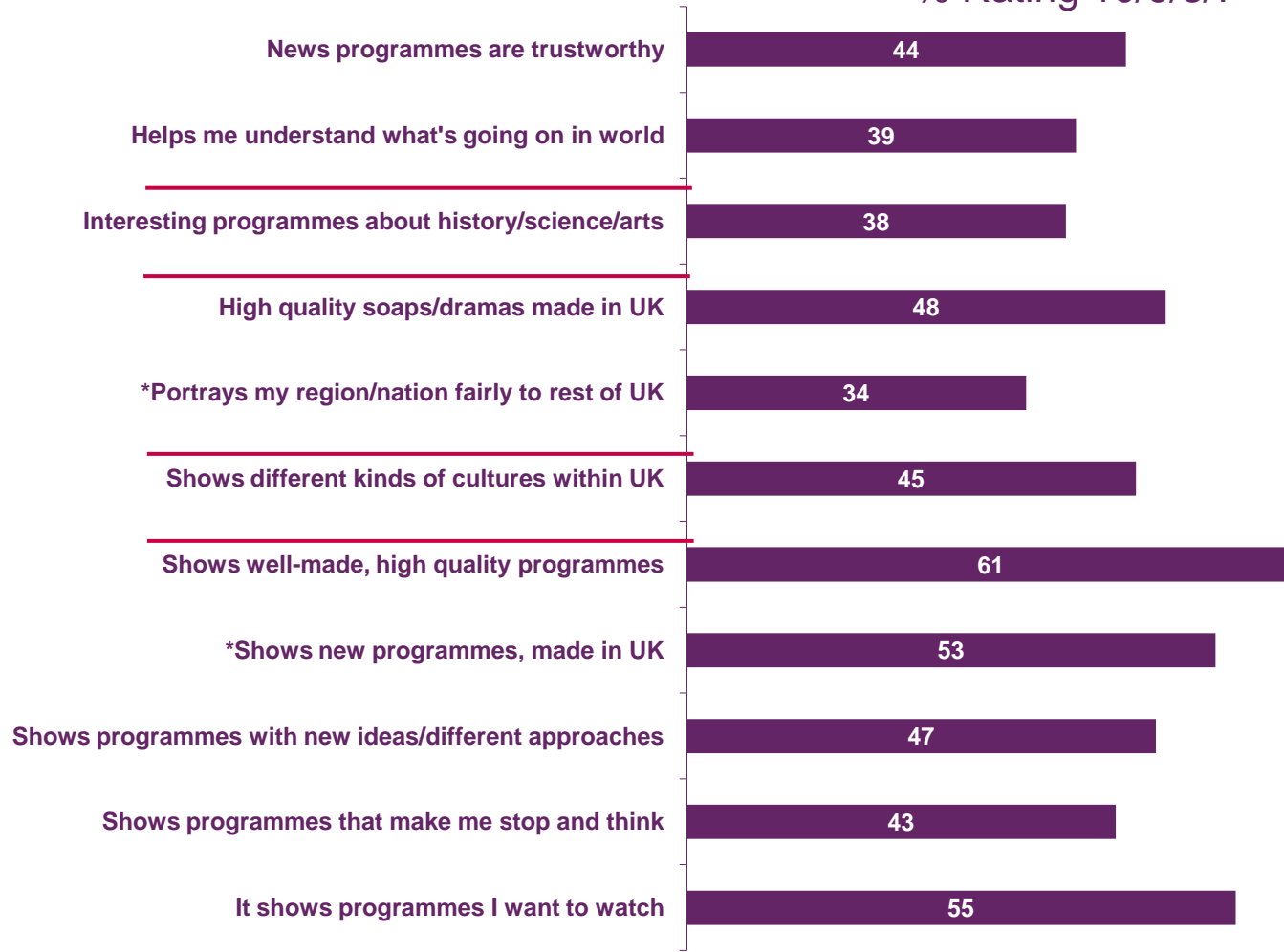


- The following charts summarise audience opinion of the delivery of each of the purposes and characteristics for BBC Three, BBC Four and BBC News among regular viewers of each channel.
- There were no significant differences between BBC Three and BBC Four apart from for *“Interesting programmes about history/science/arts”*, for which BBC Four was rated more highly (61% vs 38%).
- The lowest individual rating for a digital PSB channel was for BBC Four on the measure *“Portrays my region/nation fairly to rest of UK”* (36%).
- BBC News was only asked about two measures, one of which - *“Helps me understand what's going on in the world”* - received the highest single rating (86%) for any measure across all of the PSB channels.

## Fig 39 BBC Three



% Rating 10/9/8/7



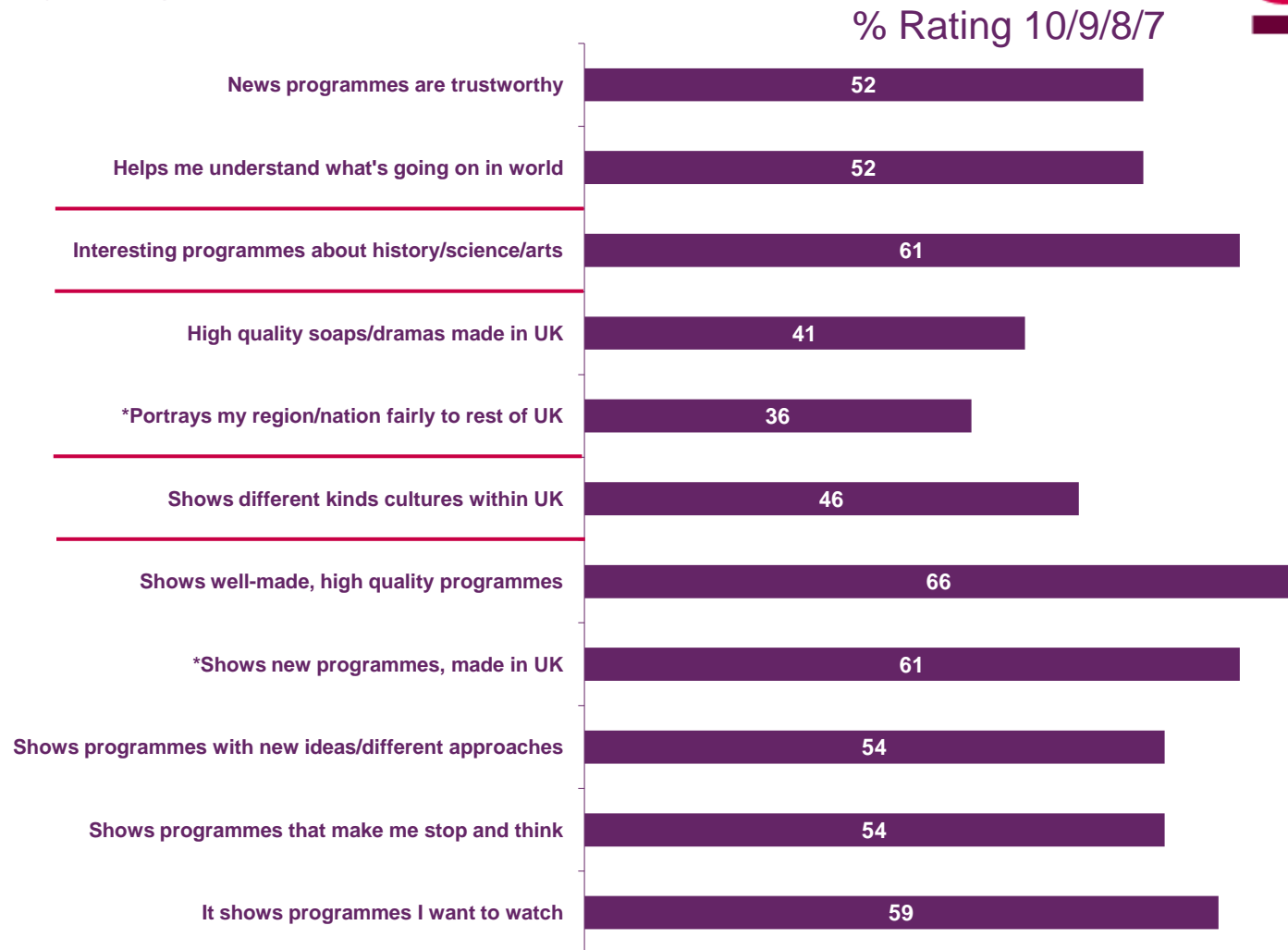
Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and one is the lowest (% rating 10/9/8/7).

Base: Self-reported regular viewers of BBC Three (260)

\*Slightly amended wording of statements since 2011



## Fig 40 BBC Four

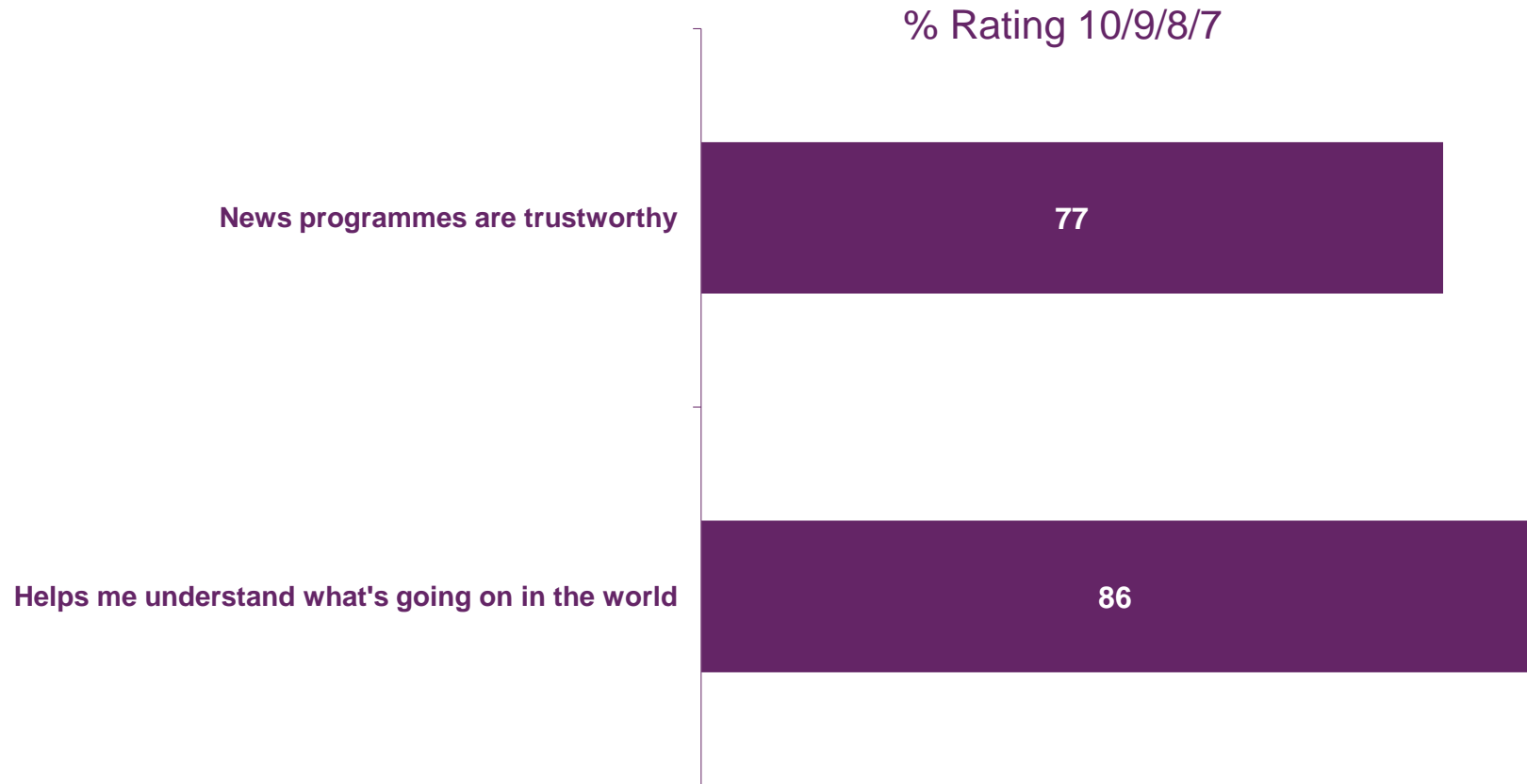


Extent to which the purpose/characteristics applies to the channel(s), where 10 is the highest score and one is the lowest (% rating 10/9/8/7).

Base: Self-reported regular viewers of BBC Four (146)

\*Slightly amended wording of statements since 2011

## Fig 41 BBC News



Base: Self-reported regular viewers of BBC News 24 (881)



## PSB website access and online viewing

## PSB website access and online viewing



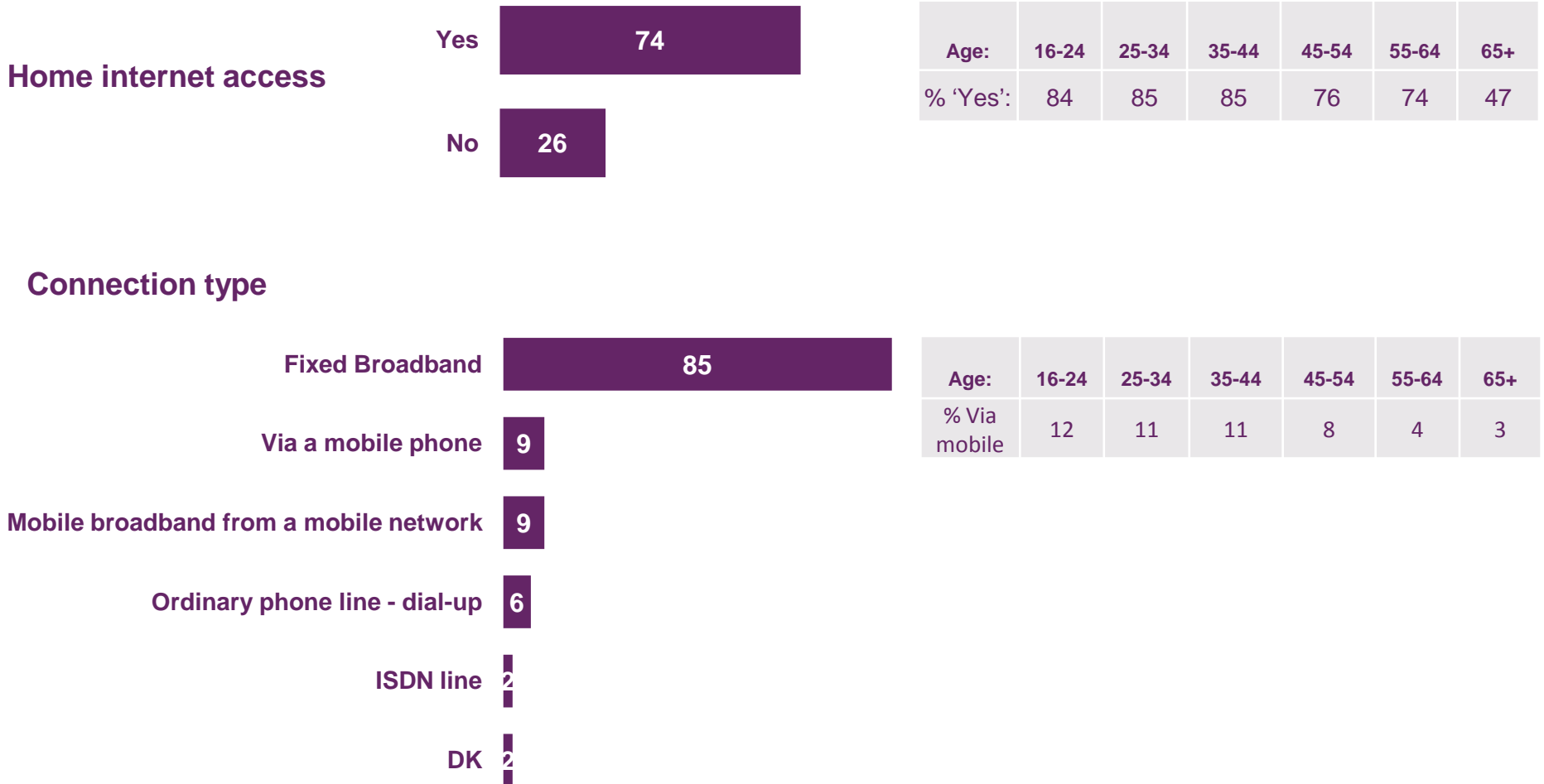
This section looks at usage of the PSB channels' websites (BBC and Channel 4 only) and catch up services, and viewing via the internet in general.

### Key themes

- 62% of all respondents felt that it was important (i.e. gave a rating of 10/9/8/7) that *the BBC provides a website high quality content that you can trust*. When asked about Channel 4's website, 45% felt it was important.
- Over half (51%) of those with internet access had used the [bbc.co.uk](http://bbc.co.uk) website in the previous month, and 11% had used [channel4.com](http://channel4.com).
- 37% of those with internet access used the internet to watch or download programmes or films.
- Over two-thirds (69%) of those did so via laptop. 10% did so via a TV connected to a computer, and 8% via a games console.
- A third (33%) of all respondents had used the BBC iPlayer in the previous month, and 13% had used 4oD.
- Satisfaction was high, with 88% of iPlayer users rating it 10/9/8/7, and 84% of 4oD users doing so.

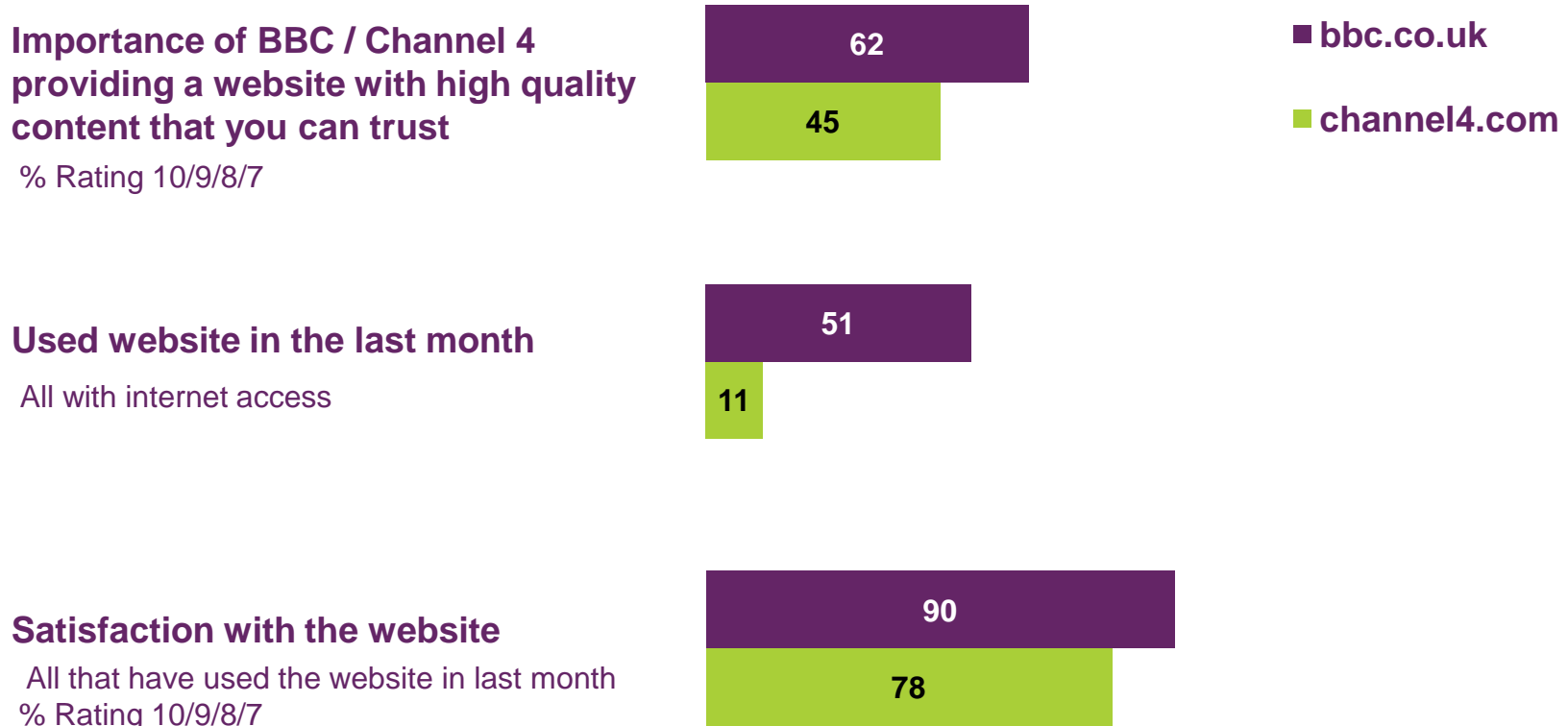


## Fig 42 Internet access and connection type at home



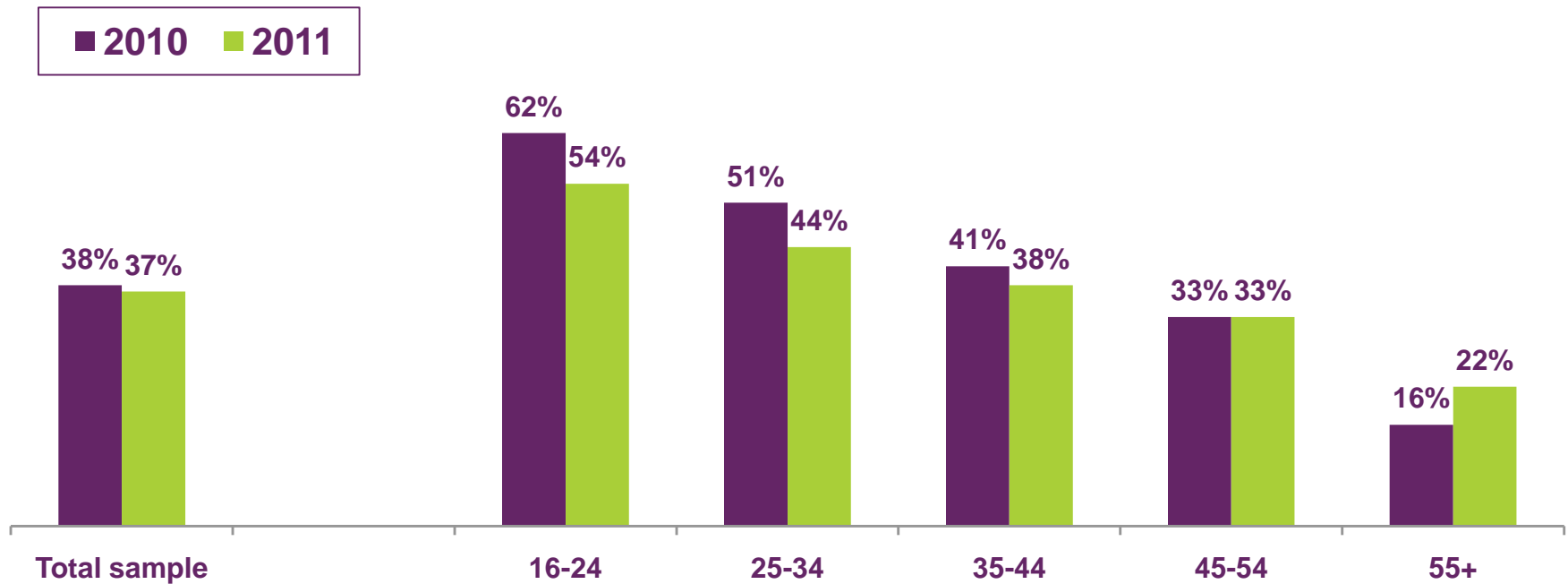
Internet usage  
 Base: All (3109), All with internet access at home (2295)

## Fig 43 Attitudes towards BBC and Channel 4 online platforms





## Fig 44 Online viewing

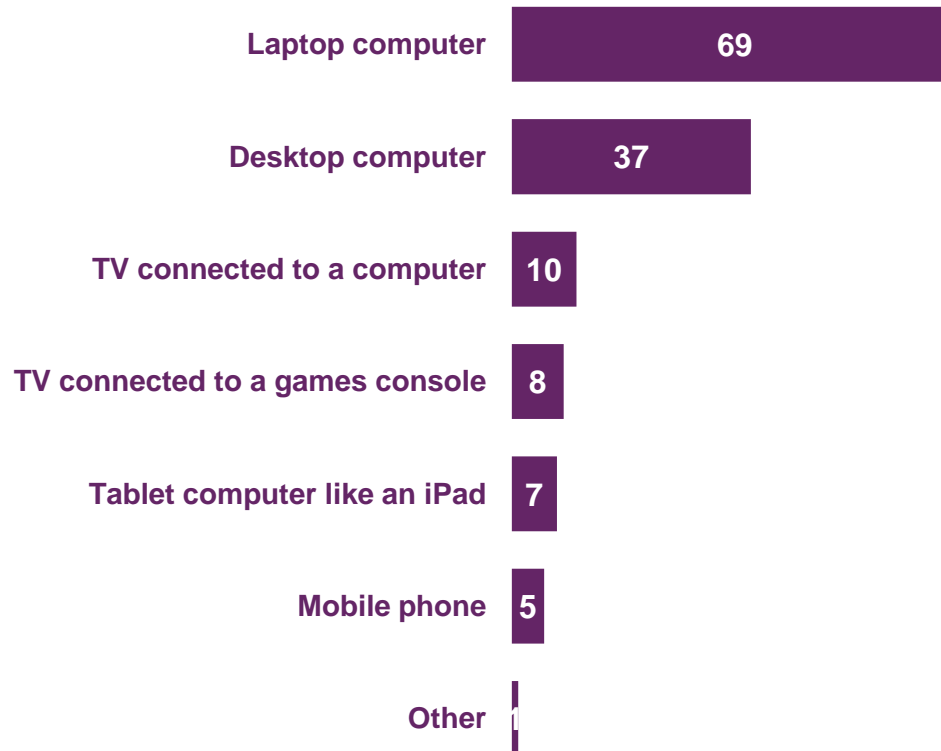


Q. Do you ever use the internet to watch or download programmes or films?

Base: All with internet access (6964,2295)

16-24 (685, 392), 25-34 (1257, 647), 35-44 (1174, 501), 45-54 (1312, 410), 55+ (2525, 582)

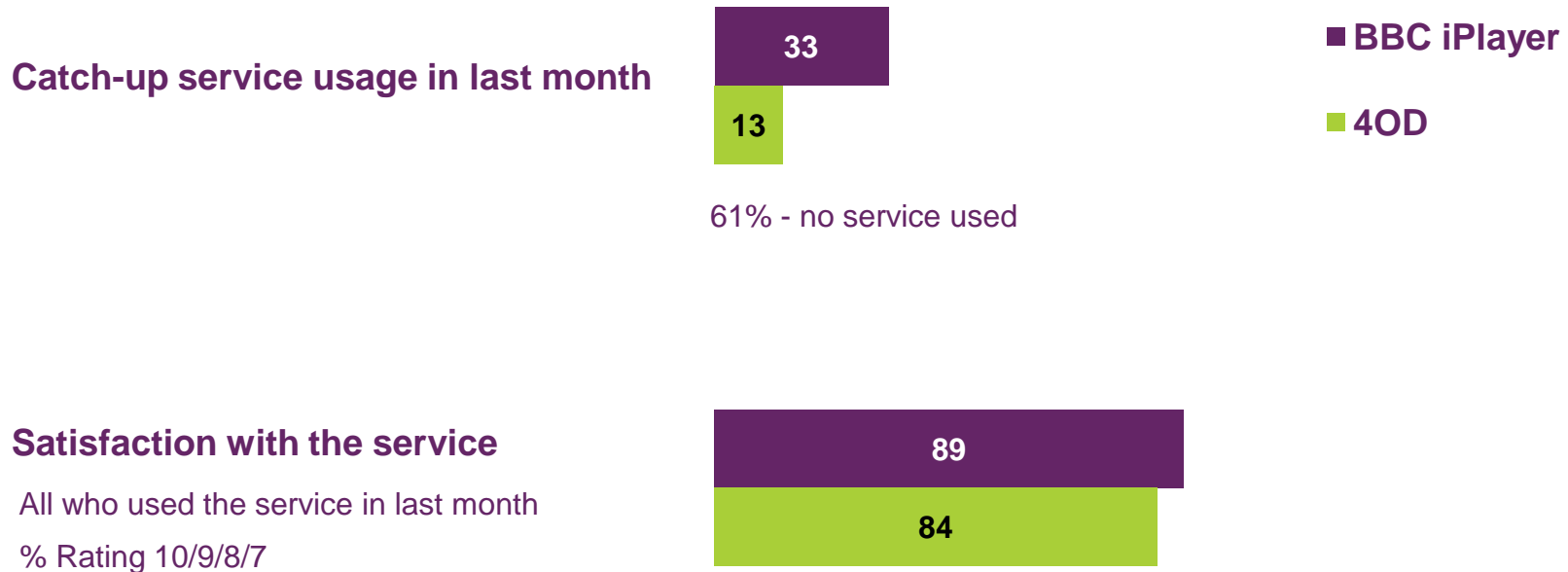
## Fig 45 Type of platform used for online viewing



Q32 Which of the following do you watch them on?

Base: All that use internet to watch or download programmes or films (810)

## Fig 46 Catch-up services

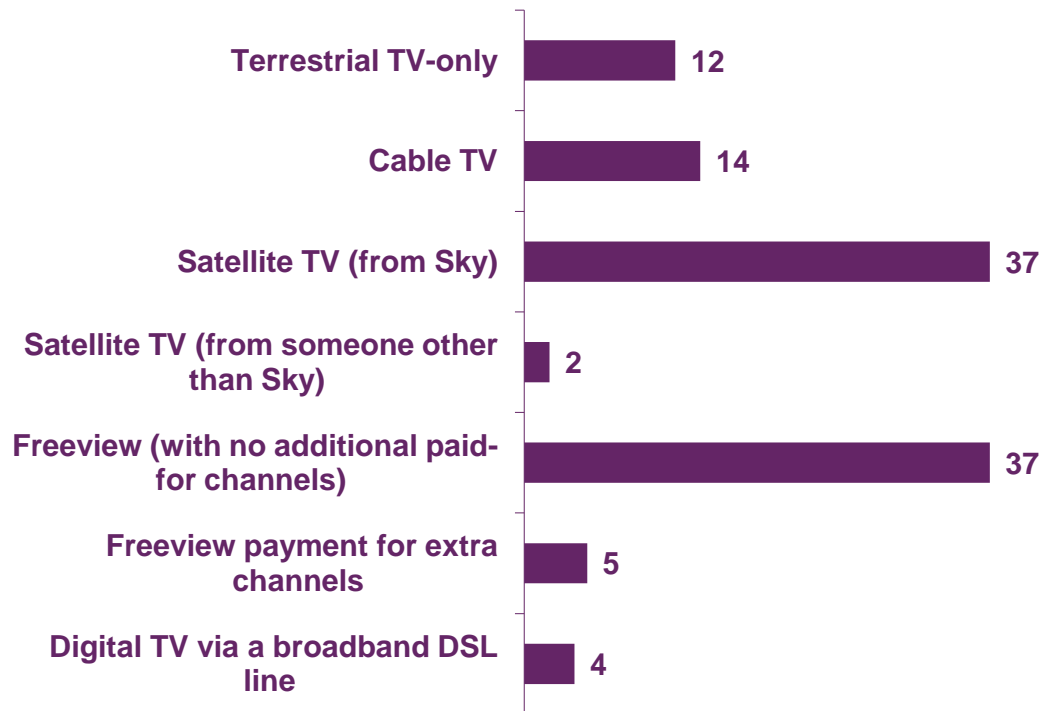


Q33 Which of the following catch-up services have you used in the last month? Base: All (3109)

Q34 And how would you rate your overall satisfaction with <online player> ? Base: All that have used this service in the last month (BBC iPlayer 998, 4OD 351, S4C Click – base too small to chart – 17)

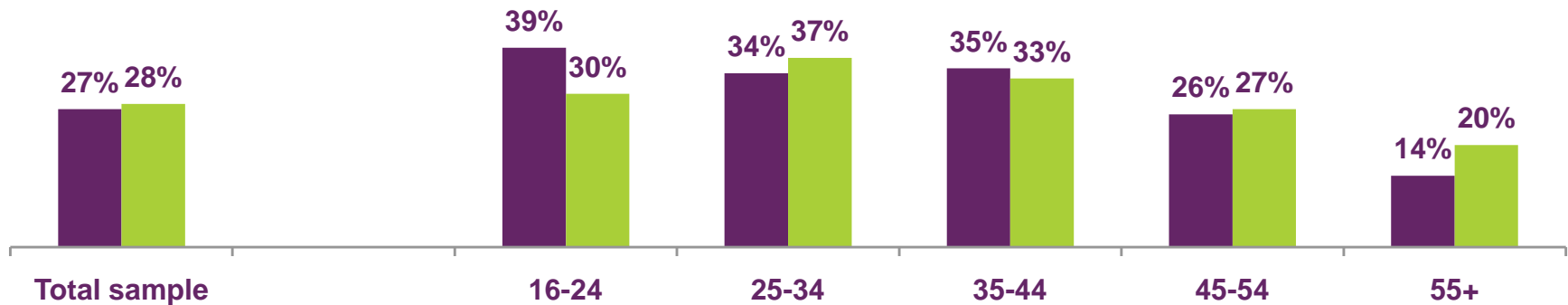
# Appendices

## TV reception type



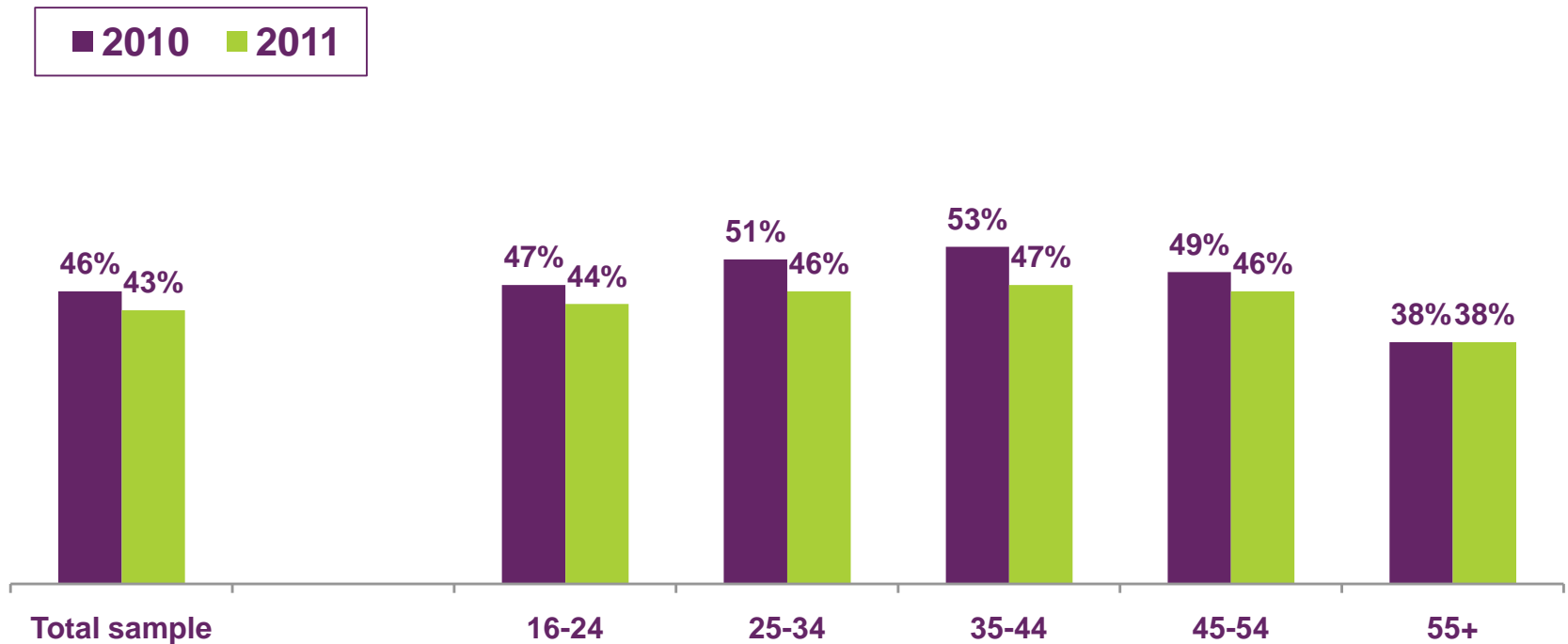
Q. Which, if any, of these types of television does your household receive at the moment?  
 Base: All (3109)

## Use of 'on demand' services



Q. Do you watch any programmes 'on demand' through your TV service? By this I mean pay-per-view programmes or using the TV catch-up services that allow you to watch some of the programmes shown in the last week. I do not mean watching programmes that you have personally recorded onto your hard-drive e.g. through Sky+ or a PVR/DVR.  
 Base: All with Sky, Virgin or broadband TV (4060, 1722), 16-24 (630, 273), 25-34 (1157, 292), 35-44 (1098, 362), 45-54 (1241, 304), 55+ (2015, 491)

# DVR use

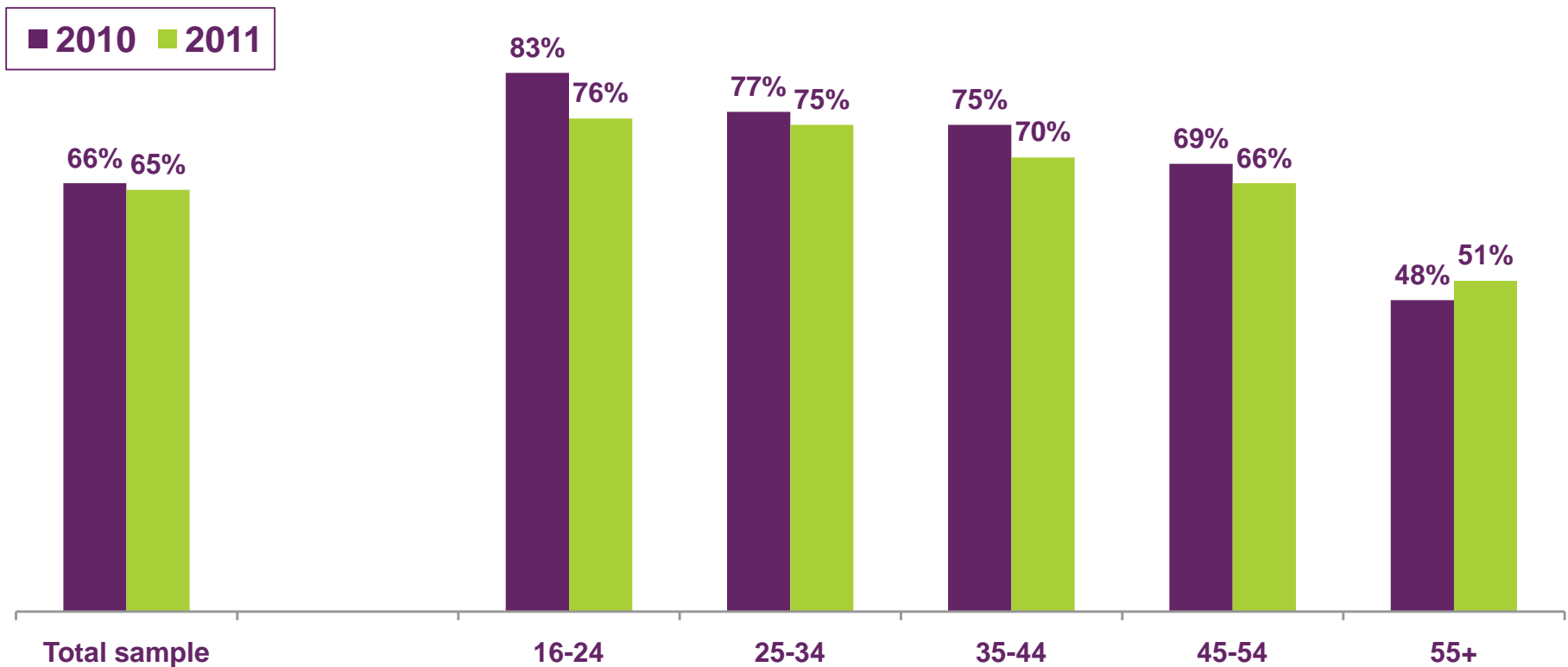


No significant differences from 2010 to 2011 at 99% level

Question changed in 2011 to “Do you use a digital recorder for your TV service that allows you to record programmes onto a hard drive, and pause and rewind live TV? For example, Sky Plus, V Plus, BT Vision V-Box or Freeview Plus.” Previously was “Do you use a recorder for your TV service that allows you to record programmes onto a hard drive, and pause and rewind live TV. Sky Plus, V Plus, BT Vision V-Box all have this as part of the service? Alternatively a digital recorder can be a separate set-top-box (DVR)?”

Base: All in 2010 (6964) and 2011 (3109), 16-24 (685, 466), 25-34 (1257, 490), 35-44 (1176, 597), 45-54 (1312, 522), 55+ (2525, 1034)

# Any non-linear viewing (DVR, TV on demand or online viewing)

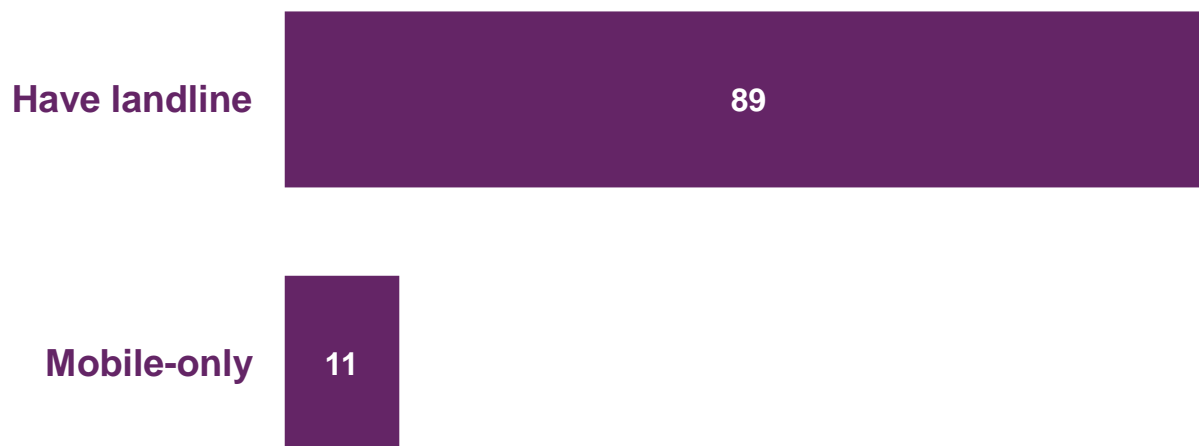


Usage of any time shifting to watch TV  
 Base: All in 2010 (6964) and 2011 (3109), 16-24 (685, 466), 25-34 (1257, 490), 35-44 (1176, 597), 45-54 (1312, 522), 55+ (2525,1034)



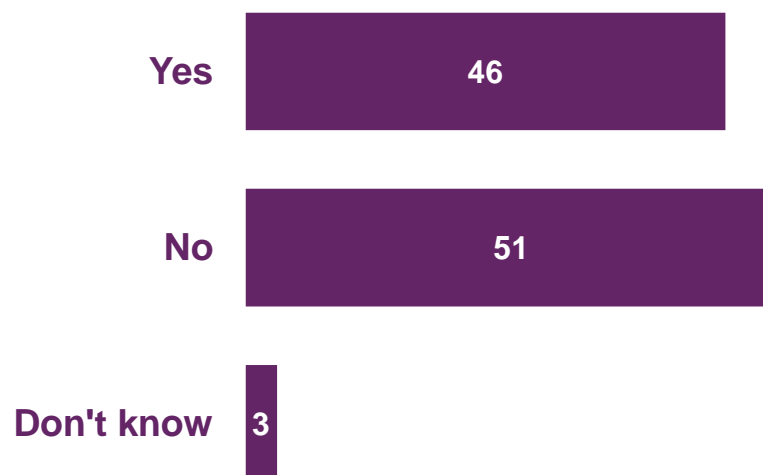


## Mobile-only households



Q2 Do you have a landline telephone at home that you can use to make or receive calls?  
Base: All (3109)

## HD service received in household



Q37a Does your household get a High Definition TV service? To get the service you will need to have a special HD set-top box from either Sky, Virgin Media, Freesat or Freeview, as well as an HD TV set.

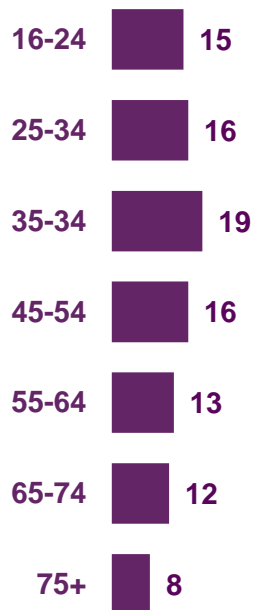
Base: All (3109)



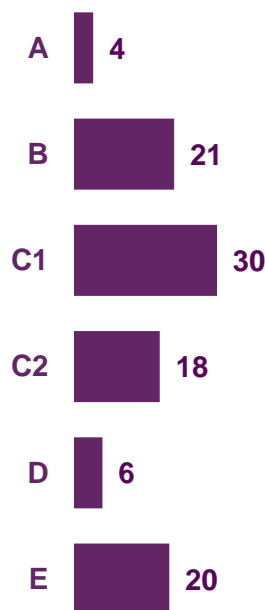
## Gender



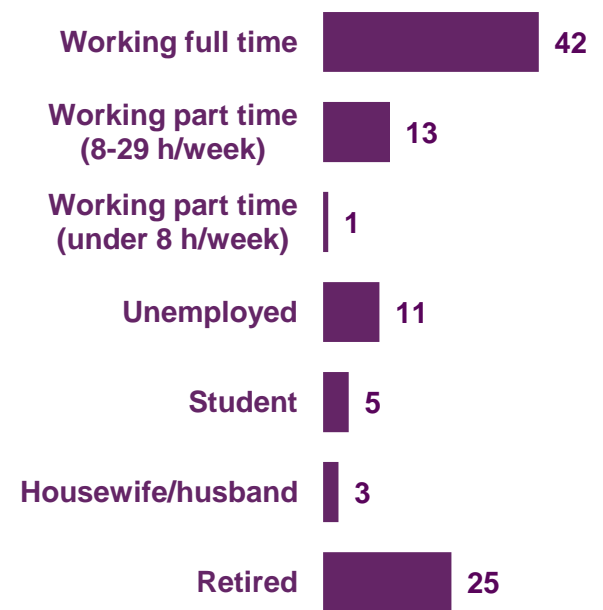
## Age

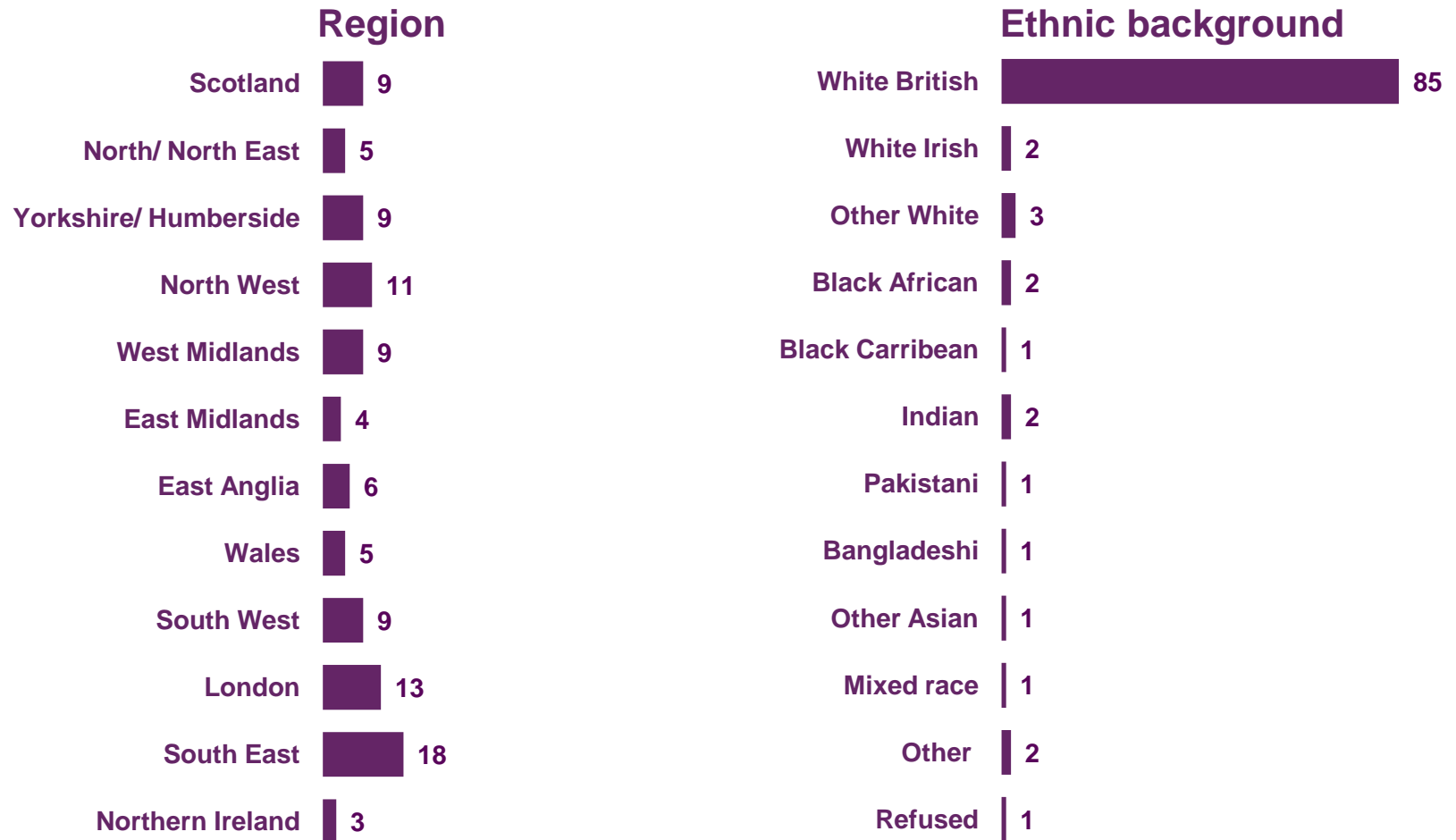


## Social Class



## Working status

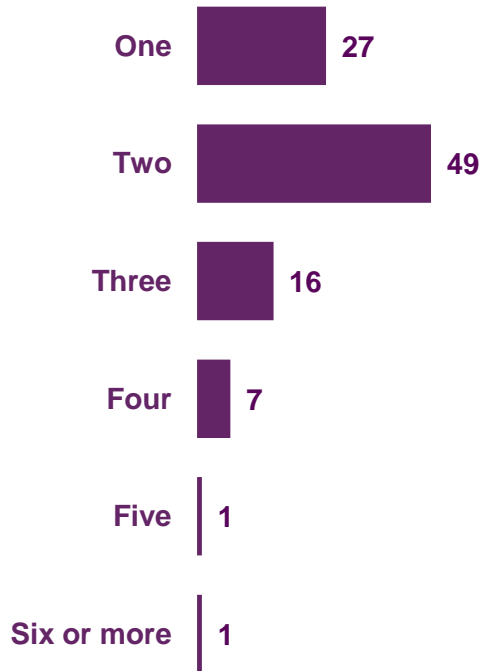






## Household size and composition

### Number of adults (16+) in household



### Children under 16 in household



### Responsible for children under 16



Demographics

Q38 How many ADULTS aged 16+ including yourself, live in your household?

Q7 Are there any children under 16 in your household?

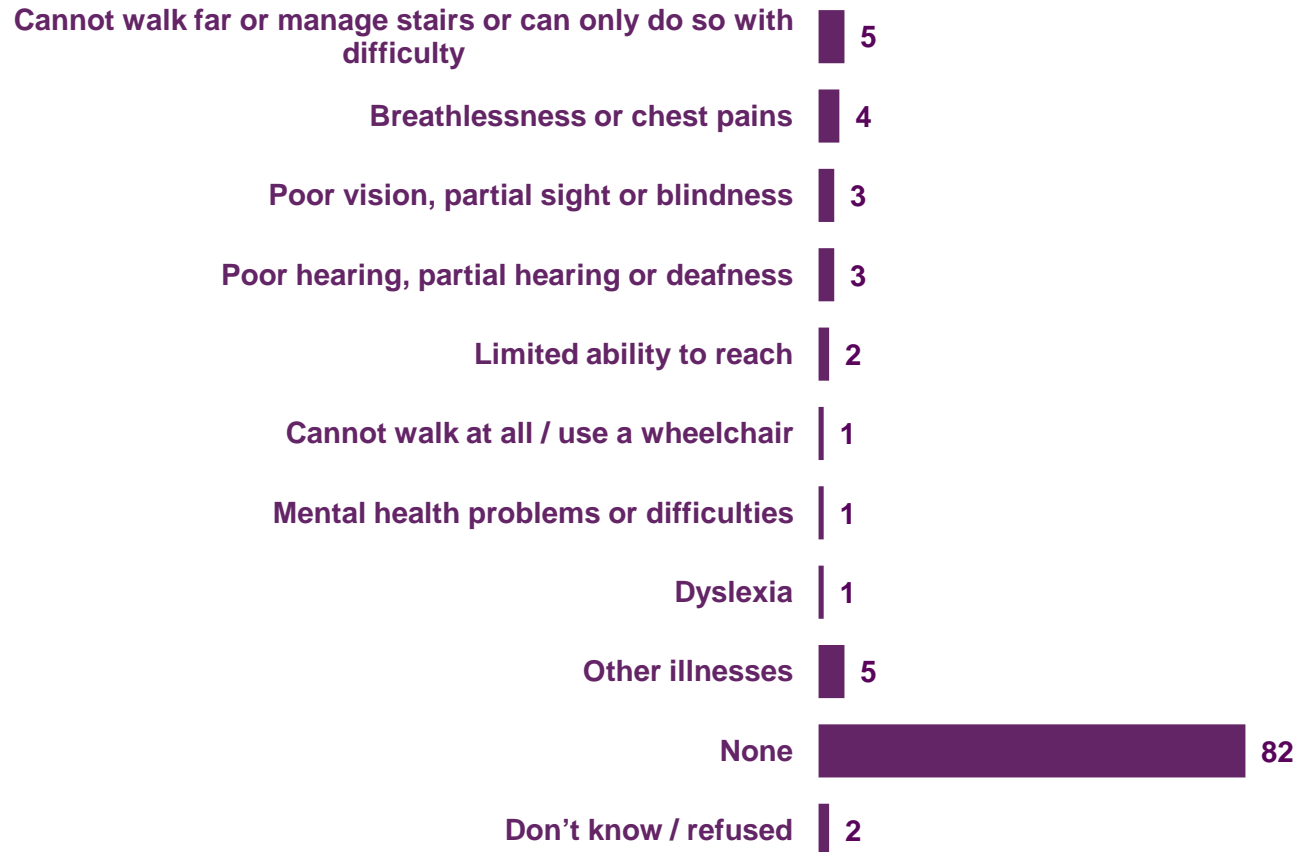
Q8 Thinking about the children under 16 in your household, please can you tell me how many fall into each of the following age bands?

Q9 And are you responsible for the children under 16 in your household? In other words – are you their parent or carer?

Base: All (3109)



## Limitations in daily activities or work



Q41 Which of these, if any, limit your daily activities or the work you can do?  
Base: All (3109)