

PSB Annual Report 2015

PSB Audience Opinion Annex

Published July 2015

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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, ITV1, Channel 4, Channel 5, BBC3, BBC4, 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.

PSB tracker survey 2014

- 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 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 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 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.
- 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 2007/2008/2009/2010 and 2011/2012/2013/2014 are not shown.

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.

Viewing

- The proportion of claimed regular viewers of individual PSB channels largely remained stable. Although BBC One, BBC Two and Channel 4 saw a decline from their recent 2012 peaks, the level of regular viewing of these channels is largely unchanged. After two years of steady increases ITV1 has declined significantly from 2012, returning to 2011 levels.
- However, on an aggregate level for those claiming to watch *any* PSB channel, claimed regular viewing is at its lowest level with drops from each of the last three years.

Importance

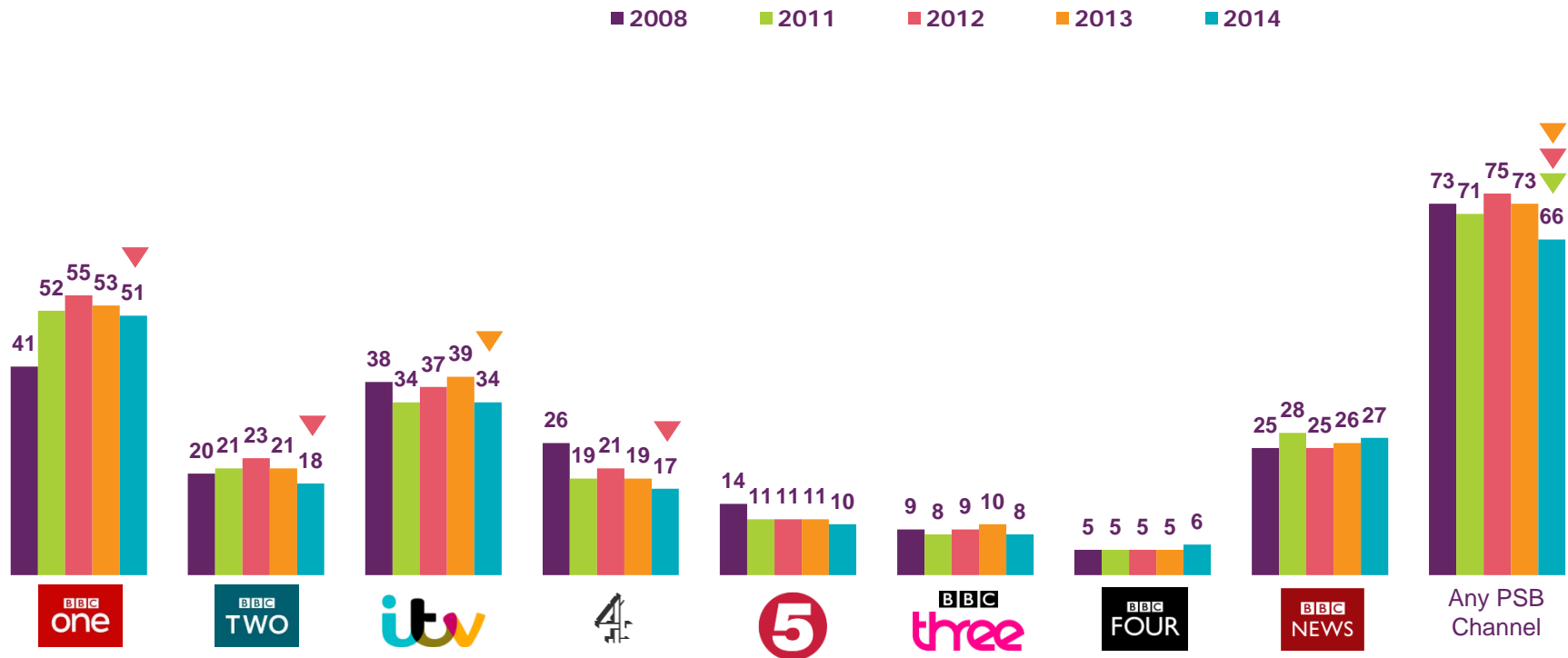
- Perceived *importance* of each of the PSB purposes remained high, with ratings for all 4 purposes consistent year on year. For some statements results were significantly higher than in 2011: the biggest increase was for the Purpose 4 statement *'its programmes show different kinds of cultures within the UK'* (from 58% to 66% between 2011 and 2014).
- Similarly, perceived *importance* of all PSB characteristics did not change year on year. *Original* increased significantly from 2012 (68% to 74%), as well as from 2011 (67% to 74%) alongside *High Quality* (78% to 82%) and *Innovative* (65% to 73%).

Delivery

- Ratings for most PSB purposes and characteristics were significantly higher than both 2011 and 2012. There were also shifts from 2013 for the PSB purpose 4 statement *'its programmes show different kinds of cultures within the UK'* (46% to 51%) and the PSB characteristic *Innovative* (47% to 52%).











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



▲ 2011 ▲ 2012 ▲ 2013 Shows direction of significant differences from 2011/2012/2013 to 2014 at 99% level

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

									Any PSB Channel
Total regular viewers (% of Total)	51	18	34	17	10	8	6	27	66
Male	49	20	28	17	8	7	6	27	62
Female	52	16	40	18	13	10	6	27	70
16-24	38	14	27	19	10	14	5	17	54
25-34	43	12	29	17	9	12	6	22	57
35-44	46	15	32	20	11	7	5	24	62
45-54	57	15	39	18	8	4	4	27	69
55-64	55	24	39	17	13	6	8	33	74
65+	60	25	38	15	11	8	7	36	76
AB	54	20	35	17	8	8	5	31	64
C1C2	48	16	33	18	12	9	6	24	65
DE	52	20	36	17	10	8	7	30	70
England	51	18	35	18	11	9	6	27	65
Scotland	46	14	29	16	9	6	4	24	73
Wales	50	17	31	15	11	8	6	28	65
N Ireland	49	17	41	18	8	8	5	27	67
White	52	19	36	17	11	8	6	27	68
MEG	40	13	25	17	9	11	7	27	55

Base: All respondents in each demographic group

Fig 3 The importance of PSB purposes 1 and 2

% Rating 10/9/8/7 for importance

■ 2014 ■ 2013 ■ 2012 ■ 2011 ■ 2008



▲ 2011 Shows direction of significant differences from 2011 to 2014 at 99% level

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

Base: All respondents (2008 asked of Sample A only: 2008 = 3403, 2011 = 3109, 2012 = 3025, 2013 = 3028, 2014 = 3158)

*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

% Rating 10/9/8/7 for importance

■ 2014 ■ 2013 ■ 2012 ■ 2011 ■ 2008

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

▲ 2011 Shows direction of significant differences from 2011 to 2014 at 99% level

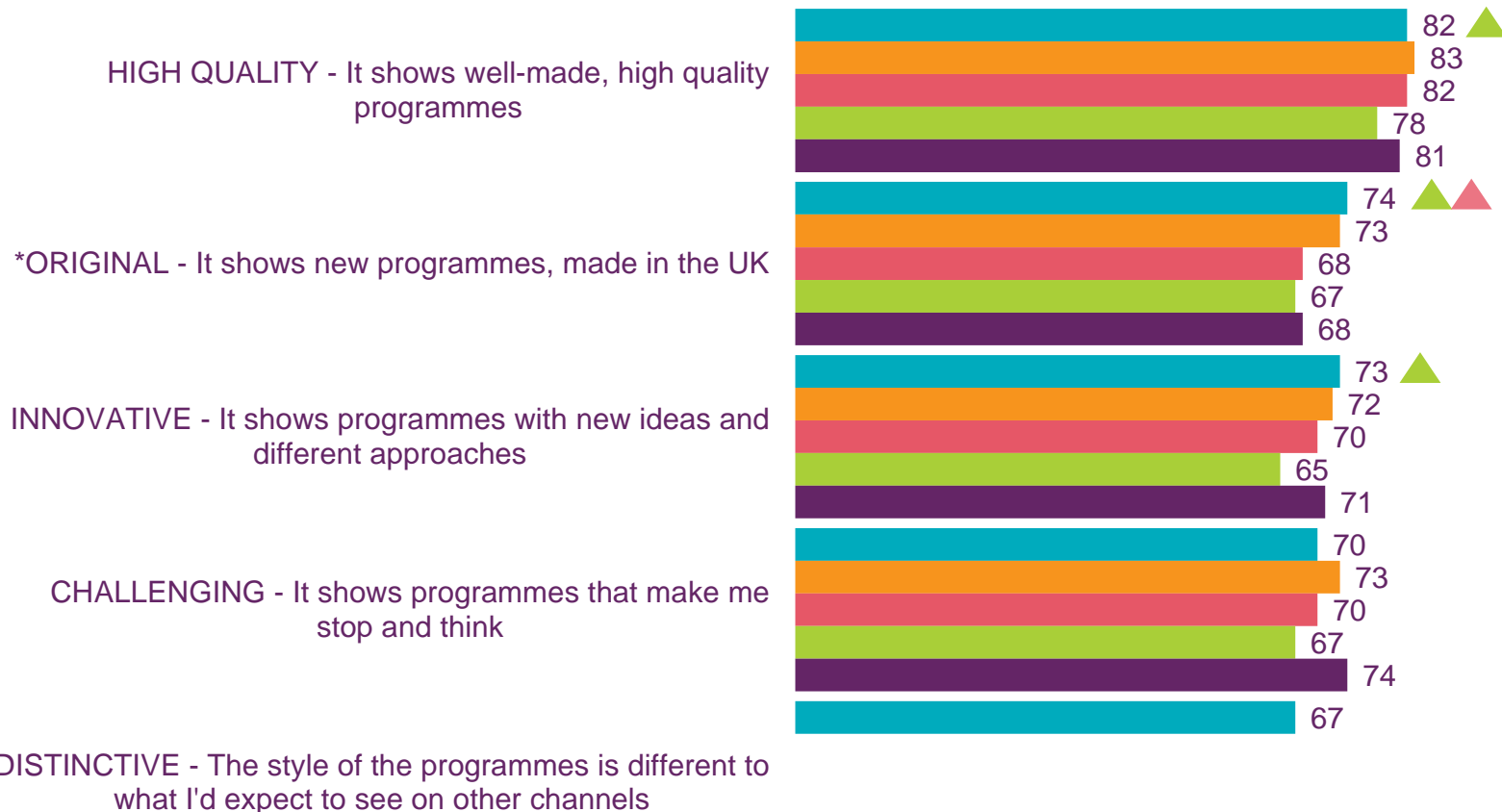
Extent to which the characteristics is important, where 10 means 'extremely important' and 1 means 'not at all important'
 Base: All respondents (2008 asked of Sample A only: 2008 = 3403, 2011 = 3109, 2012 = 3025, 2013 = 3028, 2014 = 3158)
 *NB: Before 2011 the second statement was asked as 'It portrays my region/Scotland/Wales/Northern Ireland well to the rest of the UK'



Fig 5 The importance of PSB characteristics

% Rating 10/9/8/7 for importance

■ 2014 ■ 2013 ■ 2012 ■ 2011 ■ 2008



▲ 2011 ▲ 2012 Shows direction of significant differences from 2011/2012 to 2014 at 99% level

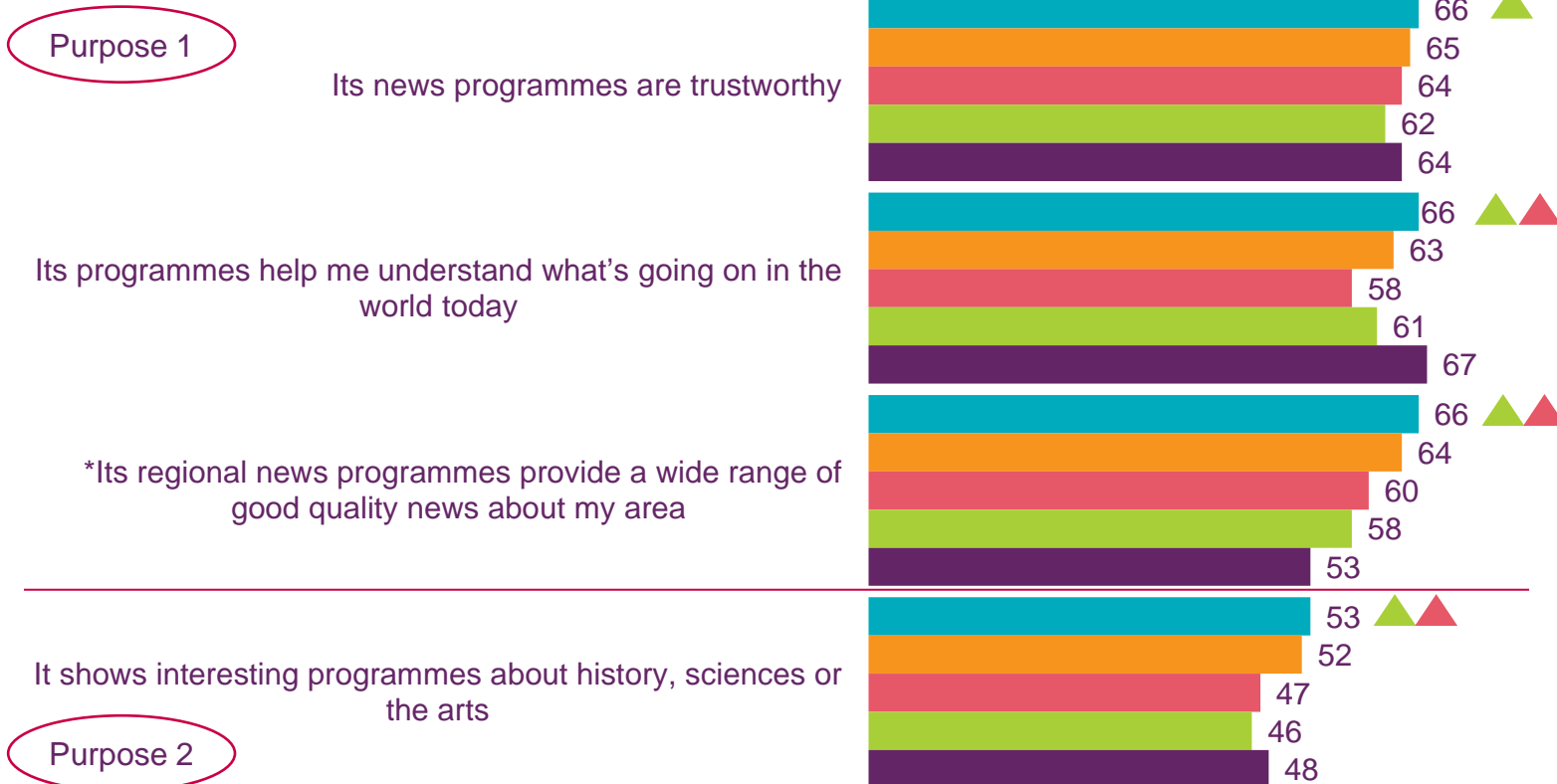
Extent to which the characteristics is important, where 10 means "extremely important" and 1 means "not at all important"
 Base: All respondents (2008 asked of Sample A only; 2008 = 3403, 2011 = 3109, 2012 = 3025, 2013 = 3028, 2014 = 3158)
 *NB: Before 2011 the second statement from the top asked as: 'It shows *enough* new programmes made in the UK'.



Fig 6 The delivery of PSB purposes 1 and 2

% Rating 10/9/8/7 for delivery

■ 2014 ■ 2013 ■ 2012 ■ 2011 ■ 2008



▲ 2011 ▲ 2012 Shows direction of significant differences from 2011/2012 to 2014 at 99% level

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 (2008 = 6798, 2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3066)

*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

% Rating 10/9/8/7 for delivery

Purpose 3



Purpose 4



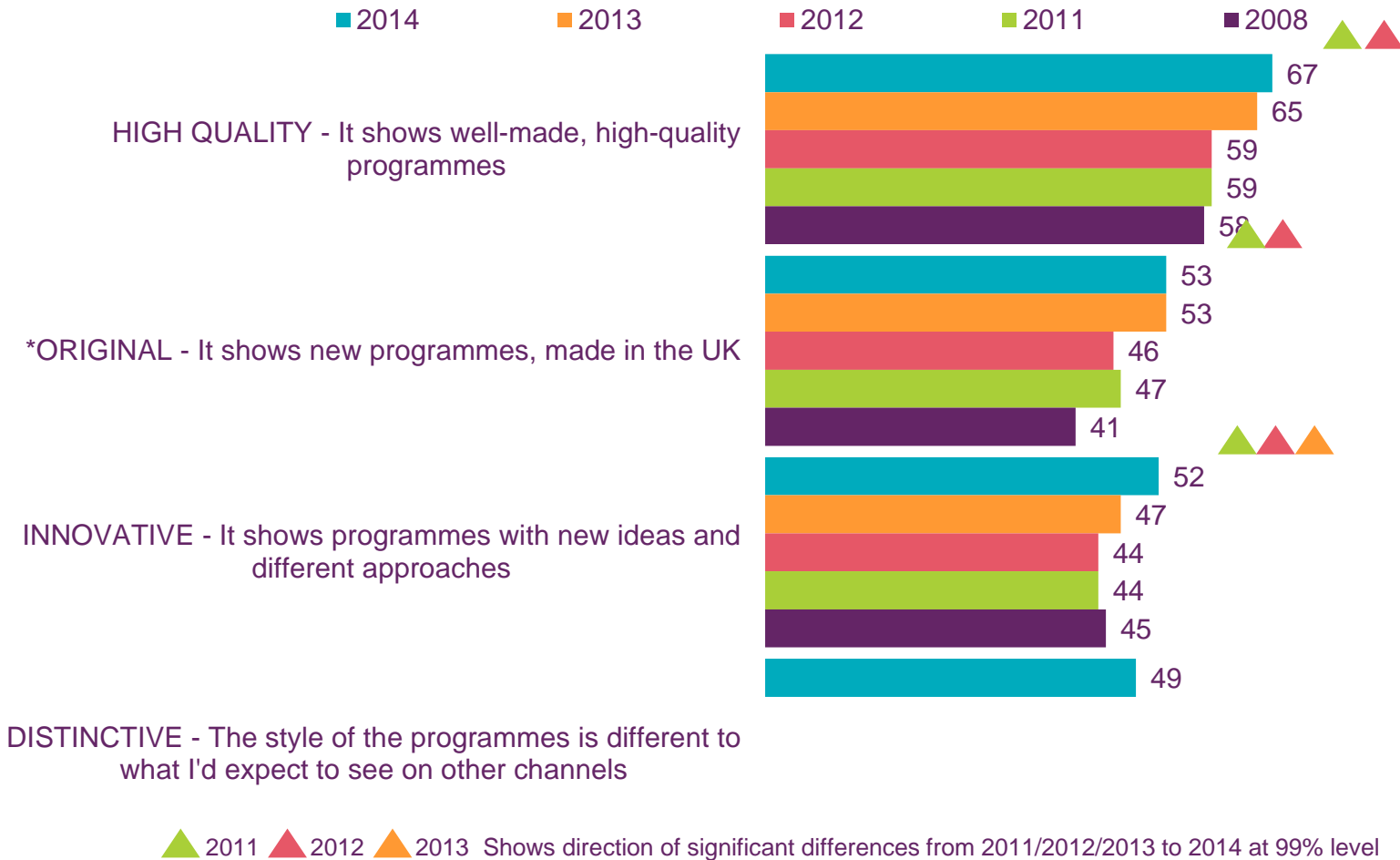
▲ 2011 ▲ 2012 ▲ 2013 Shows direction of significant differences from 2011/2012/2013 to 2014 at 99% level

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 (2008 = 6798, 2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3066)
 *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

% Rating 10/9/8/7 for delivery



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 (2008 = 6798, 2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3066)

*NB: Before 2011 the last statement asked as: 'It shows *enough* new programmes made in the UK'

Fig 9: Importance/delivery of PSB purposes

Purpose	Metric	2008	2009	2010	2011	2012	2013	2014	
Its news programmes are trustworthy	Importance	82%	82%	84%	81%	85%	87%	86%	↑
	Delivery	64%	62%	65%	62%	64%	65%	66%	
Its programmes help me understand what's going on in the world today	Importance	81%	78%	81%	78%	80%	79%	80%	
	Delivery	67%	66%	67%	61%	58%	63%	66%	
Its regional news programmes provide a wide range of good quality news about my area^	Importance	75%	74%	76%	76%	78%	81%	79%	↑
	Delivery	53%	51%	50%	58%	60%	64%	66%	↑
It shows interesting programmes about history, sciences or the arts	Importance	68%	66%	70%	65%	68%	69%	67%	
	Delivery	48%	49%	52%	46%	47%	52%	53%	↑
It portrays my region/Scotland/Northern Ireland/Wales fairly to the rest of the UK^	Importance	58%	59%	60%	63%	66%	68%	66%	↑
	Delivery	34%	34%	33%	43%	40%	44%	46%	↑
Its programmes show different kinds of cultures within the UK	Importance	64%	63%	66%	58%	65%	65%	66%	
	Delivery	47%	46%	48%	43%	43%	46%	51%	↑↑
It shows high quality soaps/dramas made in the UK	Importance	50%	52%	54%	53%	57%	58%	60%	↑
	Delivery	49%	50%	52%	47%	47%	51%	53%	↑
It provides a wide range of high quality and UK made programmes for children*	Importance	88%	84%	87%	81%	80%	85%	81%	
	Delivery	59%	60%	60%	60%	61%	68%	70%	
It shows high quality comedy made in the UK	Importance							65%	
	Delivery				Not asked			50%	
It shows different parts of the UK including England, NI, Scotland and Wales	Importance							65%	
	Delivery				Not asked			49%	

- ↑ Significantly higher than 2013 ↑ Significantly higher than 2008
- ↓ Significantly lower than 2013 ↓ Significantly lower than 2008

Summary % of respondents rating Importance/Delivery 10/9/8/7. Base for Importance: All (in 2014 n = 3158); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (in 2014 n = 3066). *All whose children regularly watch any of these channels: BBC One, Cbeebies, CBBC, Channel 5. 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'

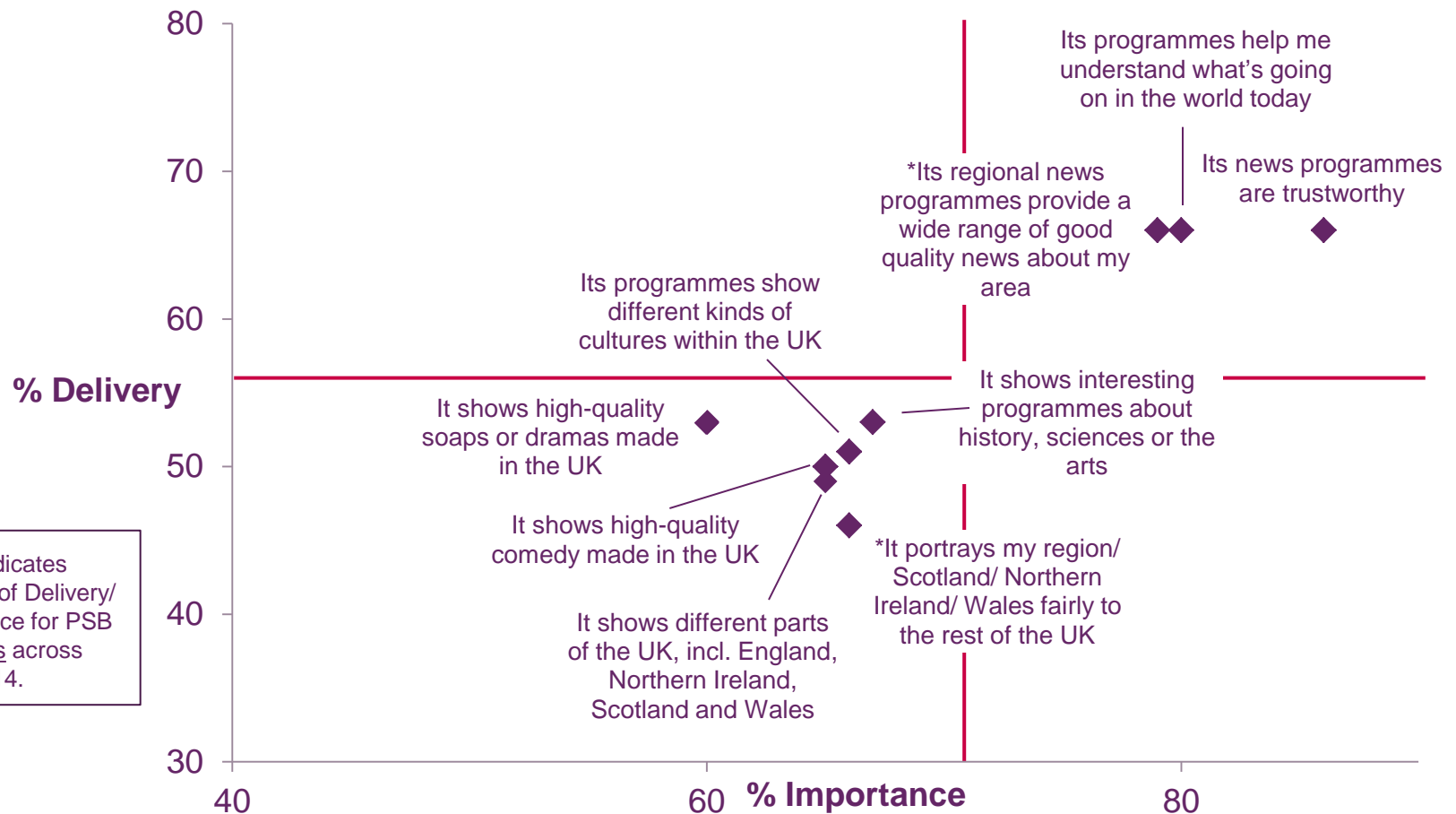
Fig 10: Importance and delivery of PSB characteristics 2008-2014

Purpose	Metric	2008	2009	2010	2011	2012	2013	2014	
It shows well made high quality programmes	<i>Importance</i>	81%	82%	84%	78%	82%	83%	82%	
	<i>Delivery</i>	58%	57%	62%	59%	59%	65%	67%	↑
It shows programmes I want to watch	<i>Importance</i>	78%	78%	79%	77%	78%	78%	na	
	<i>Delivery</i>	50%	49%	52%	52%	51%	56%		
It shows programmes that make me stop and think	<i>Importance</i>	74%	71%	76%	67%	70%	76%	70%	↓
	<i>Delivery</i>	49%	48%	50%	43%	44%	49%	na	
It shows new programmes made in the UK**	<i>Importance</i>	68%	70%	73%	67%	68%	73%	74%	↑
	<i>Delivery</i>	41%	42%	45%	47%	46%	53%	53%	↑
It shows programmes with new ideas and different approaches	<i>Importance</i>	71%	69%	73%	65%	70%	72%	73%	
	<i>Delivery</i>	45%	44%	48%	44%	44%	47%	52%	↑↑
The style of programmes is different to what I'd expect to see on other channels	<i>Importance</i>							67%	
	<i>Delivery</i>				<i>Not asked</i>			49%	

↑ Significantly higher than 2013 ↑ Significantly higher than 2008
 ↓ Significantly lower than 2013 ↓ Significantly lower than 2008

Source: PSB Tracker, 2008-2014, 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 2014 n = 3158); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (in 2014 n = 3066)

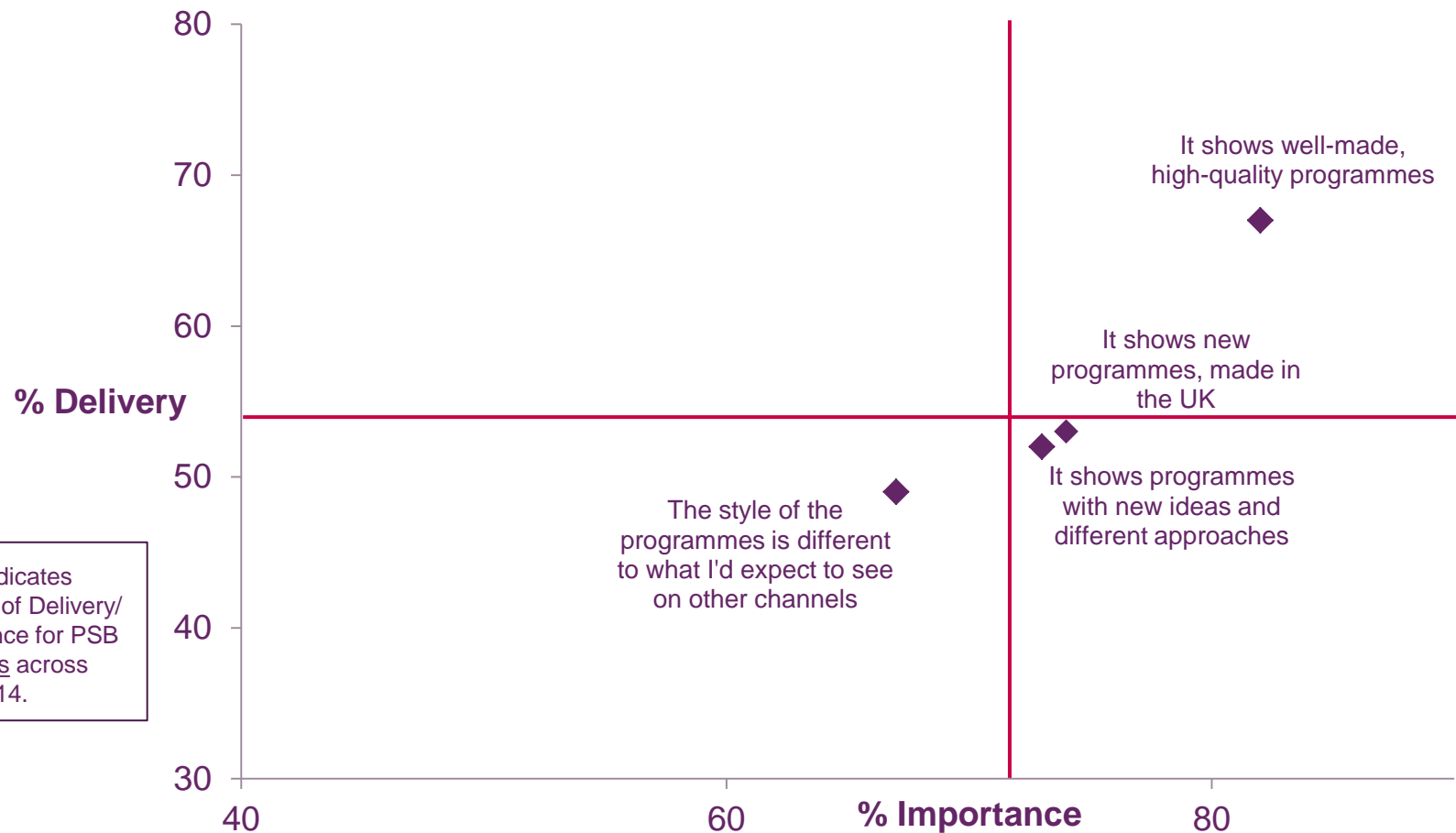
Fig 11 Summary of the importance and delivery of PSB purposes 2014



Summary % of respondents rating Importance/Delivery 10/9/8/7
 Base for Importance: All (3158); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (3066)



Fig 12 Summary of the importance and delivery of PSB characteristics, 2014



Summary % of respondents rating Importance/Delivery 10/9/8/7
 Base for Importance: All (3158); Base for Delivery: All respondents who watch any PSB channels regularly or occasionally (3066)

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 satisfaction with the delivery of PSB remained high with over three quarters (79%) of those who ever watch any PSB channel claiming to be either very or quite satisfied, in line with satisfaction in 2012 (77%).
- When looking by age group, satisfaction with PSB in 2014 was significantly higher amongst 45-54 year olds (83%) compared to all respondents, and significantly lower among those aged 65+ (72%).
- There were no significant differences by socio-economic group.
- When asked about their level of satisfaction compared to one year ago, a similar proportion (10%) claimed to be more satisfied, compared to 11% claiming to be less satisfied than the previous year. The proportion more satisfied is in line with the level recorded in 2013 while the proportion less satisfied is significantly lower (down from 16% in 2013).
- Key drivers of dissatisfaction included *'too many repeats'* (37%) and *'boring/not interesting'* (26%). Main reasons behind increased satisfaction this year include *'better choice/ variety of programmes'* (39%), *'better quality of programmes'* (16%) and *'better dramas/films'* (10%).
- There were no significant differences in satisfaction by method of viewing or linear vs. non-linear viewing.

Fig 13 Overall satisfaction with PSB over time



No significant differences between 2014 and earlier years at 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 channel (2008 = 6798, 2011 = 3079, 2012 = 2983, 2013 = 2926, 2014 = 3066)

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



No significant differences by subgroup, 99% level

▲ Shows direction of significant differences from 2013 to 2014 at 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 who ever watch any PSB channels 2014 (3066), 2013 (2926)

16-24 (438); 25-34 (493); 35-44 (519); 45-54 (536); 55-64 (451); 65+ (629); AB (645); C1C2 (1588); DE (833)

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 (3066)

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	Change vs 2013 - pp
There are a lot of repeats	37%	-3
I do not find them interesting/they are boring/rubbish	26%	-1
Poor quality of programmes	10%	=
Too many reality shows	10%	-2
A lot of the programmes are all the same/similar	6%	Na
Not enough new programmes	4%	-7 ▼
I do not watch TV/I do not watch a lot of TV	4%	=
Not enough choice/variety	4%	+2

All other responses were below 4%.

▲ Shows direction of significant differences from 2013 to 2014 at 99% level

Q *What makes you say this?*

Base: All less satisfied compared with last year (342)

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	Change vs 2013 pp
Better/more choice/variety of programmes	38%	-1
Better quality of programmes	16%	+1
Better dramas/films	10%	=
Programmes are more informative/relevant information	8%	+4
I'm just able to watch more TV now	7%	=
More interesting programmes	7%	-8
Like the way the news is portrayed	4%	-3
More interesting documentaries	4%	-2
More cultural programmes shown	3%	-2
More channels are becoming appealing now	3%	-5

All others below 3%

Q *What makes you say this?*

Base: All more satisfied compared with last year (299)

Fig 18 Overall satisfaction with PSB by viewing platform

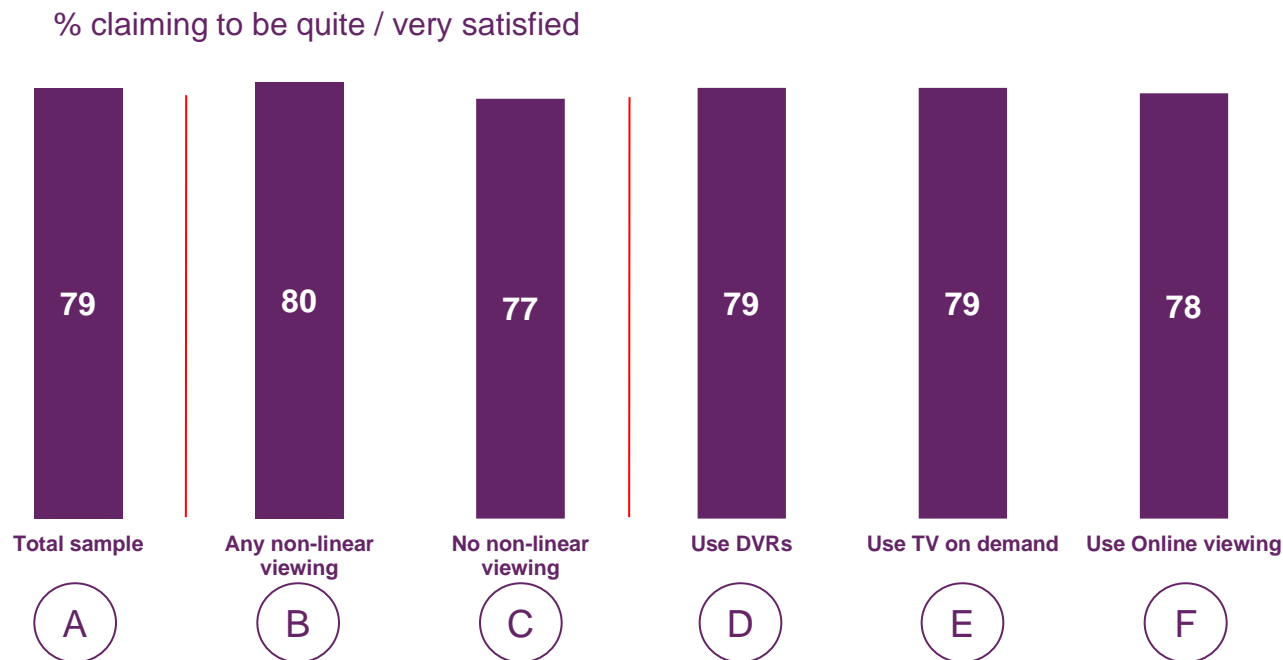


No significant differences (net satisfied) between any platform (99% level)

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 (3066); Freeview only (941); Cable/Satellite (1995); Online only (80) – CAUTION SMALL BASE SIZE

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



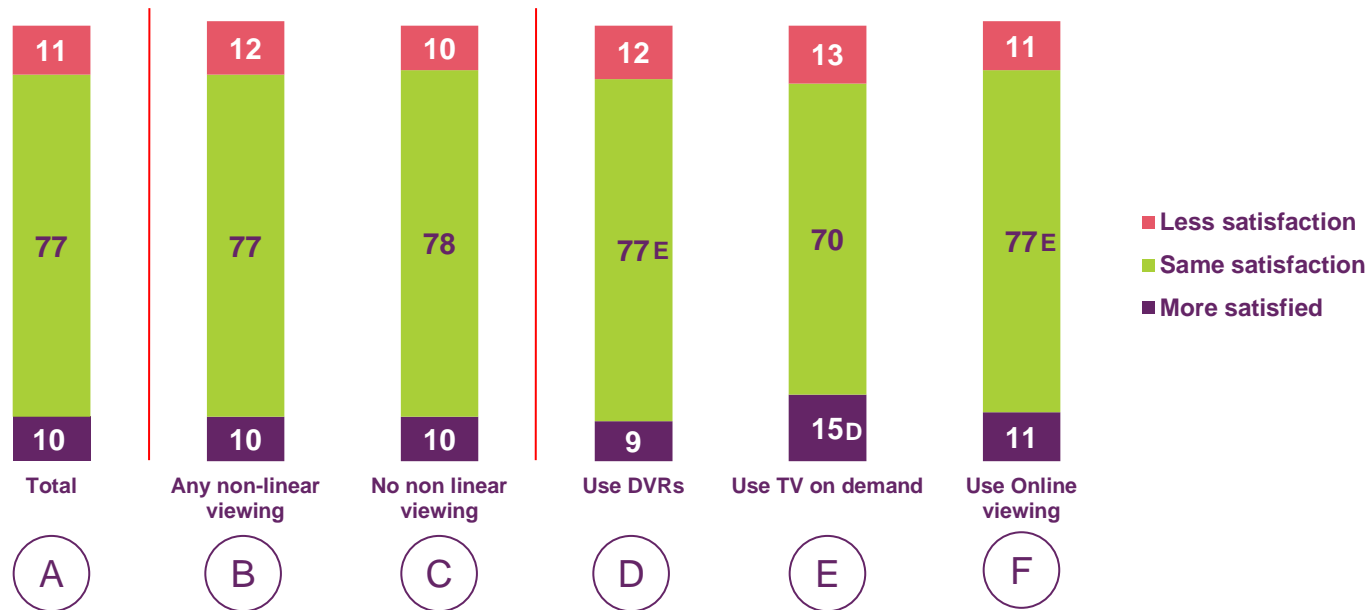
No significant differences between categories (99% level – A/B/C/D/E/F)

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 (3066), Any non-linear viewing (2253), No non-linear viewing (813), Use DVRs (1568), Use TV on demand (680), Use Online viewing (1004)

Fig 20 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



A/B/C/D/E/F shows significantly higher within category (99% level)

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 (3066), Any non-linear viewing (2253), No non-linear viewing (813), Use DVRs (1568), Use TV on demand (680), Use Online viewing (1004)

PSB nations and regions news

PSB nations/regions news

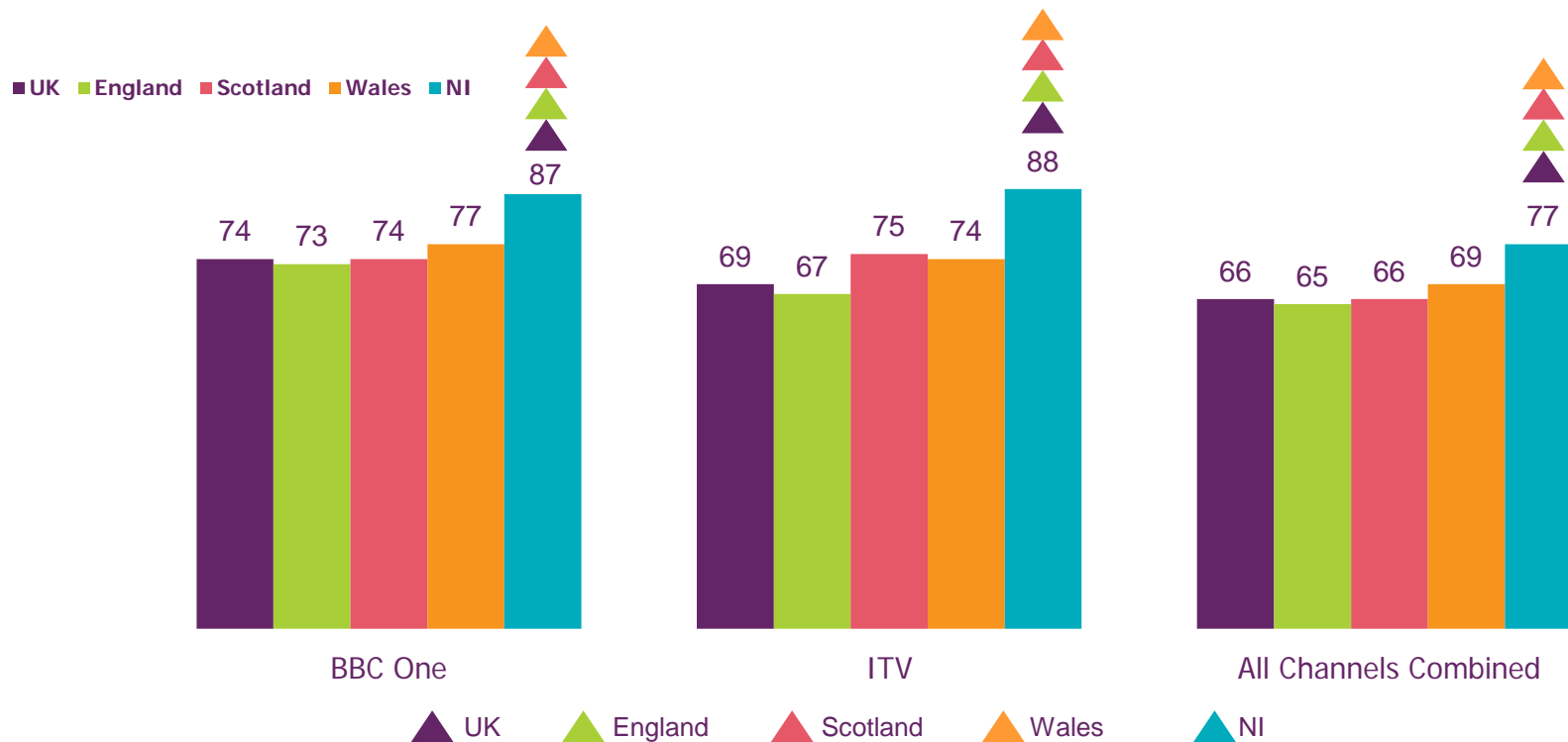
- The focus of this section is on opinion of PSB nations/regions news programming in the UK nations, which is reflected in the statement *'its regional news programmes provide a wide range of programmes about my area'*.
- This statement is one element of Purpose 1 – *'to inform ourselves and others and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

Key themes

- Views in the nations about the provision of nations/regions news vary:
- All PSB channels combined
 - All nations were consistent with 2013, while both England and Scotland saw significant improvement from 2011 and England alone from 2012 in the opinion on the delivery of nations/regions news for all channels combined. As in the last two waves, in 2014 NI rated delivery significantly higher than all other nations.
- BBC One
 - England, Scotland and NI all saw upward shifts in opinion of its delivery of nations/regions news from 2011 and NI also saw an increase from 2012. As for All Channels Combined, NI rated delivery significantly higher than all other nations.
- ITV1
 - Stable rating for the delivery of nations/regions news for ITV1 in all UK nations compared to 2013 with increases from 2011 for both England and NI and from 2012 for NI only. Again, NI rated delivery significantly higher than all other nations.

Fig 21 'Its regional news programmes provide a wide range of good quality news about my area' (2014 split by nation)

% Rating 10/9/8/7 for delivery



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

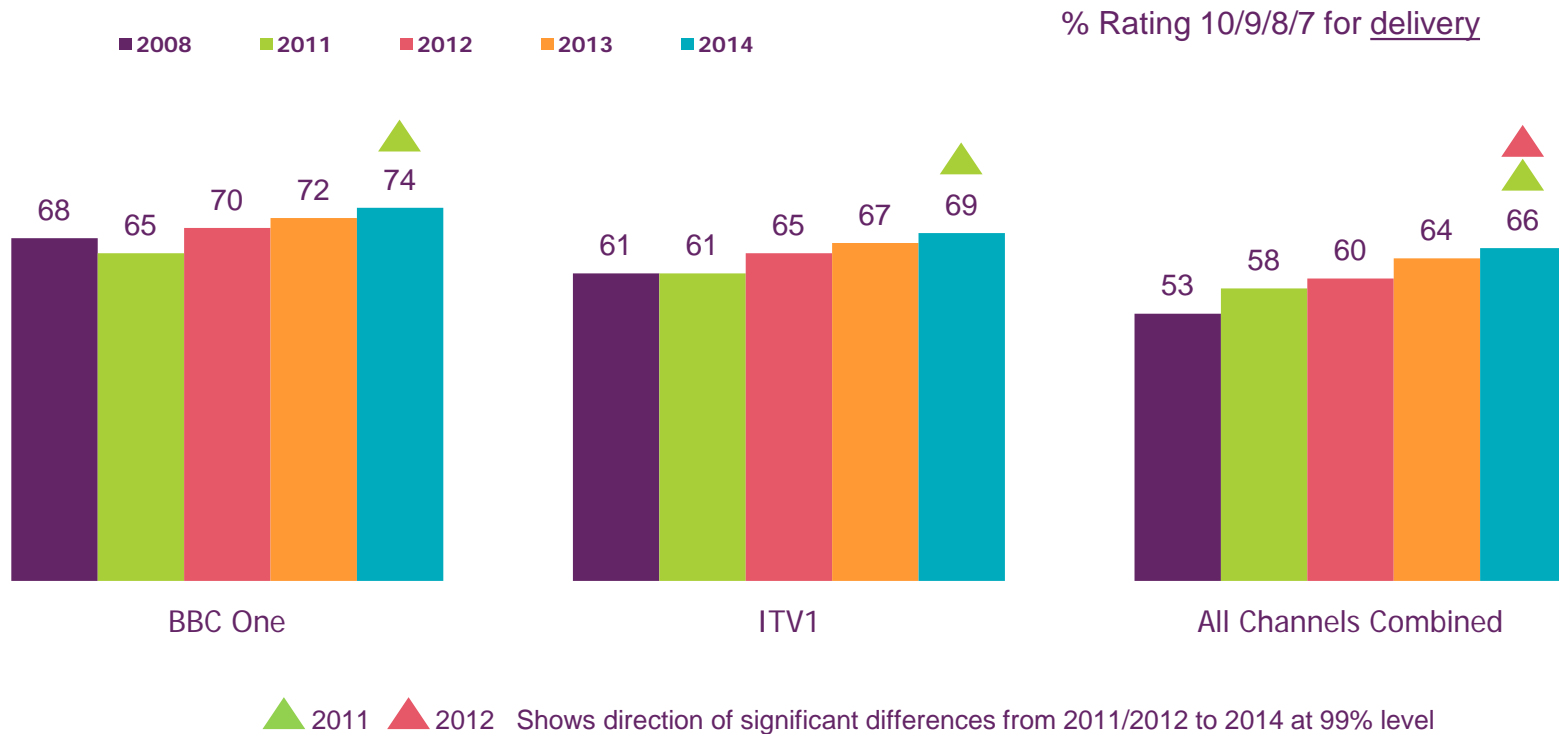
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-reported regular viewers of each in each nation (BBC One = 1570, 859, 240, 238, 223. ITV1 = 1071, 581, 151, 147, 192)

Base for 'All channels combined': All respondents who ever watch any PSB channels in each nation (3066, 1637, 510, 457, 462)

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 22 'Its regional news programmes provide a wide range of good quality news about my area' (all nations combined)



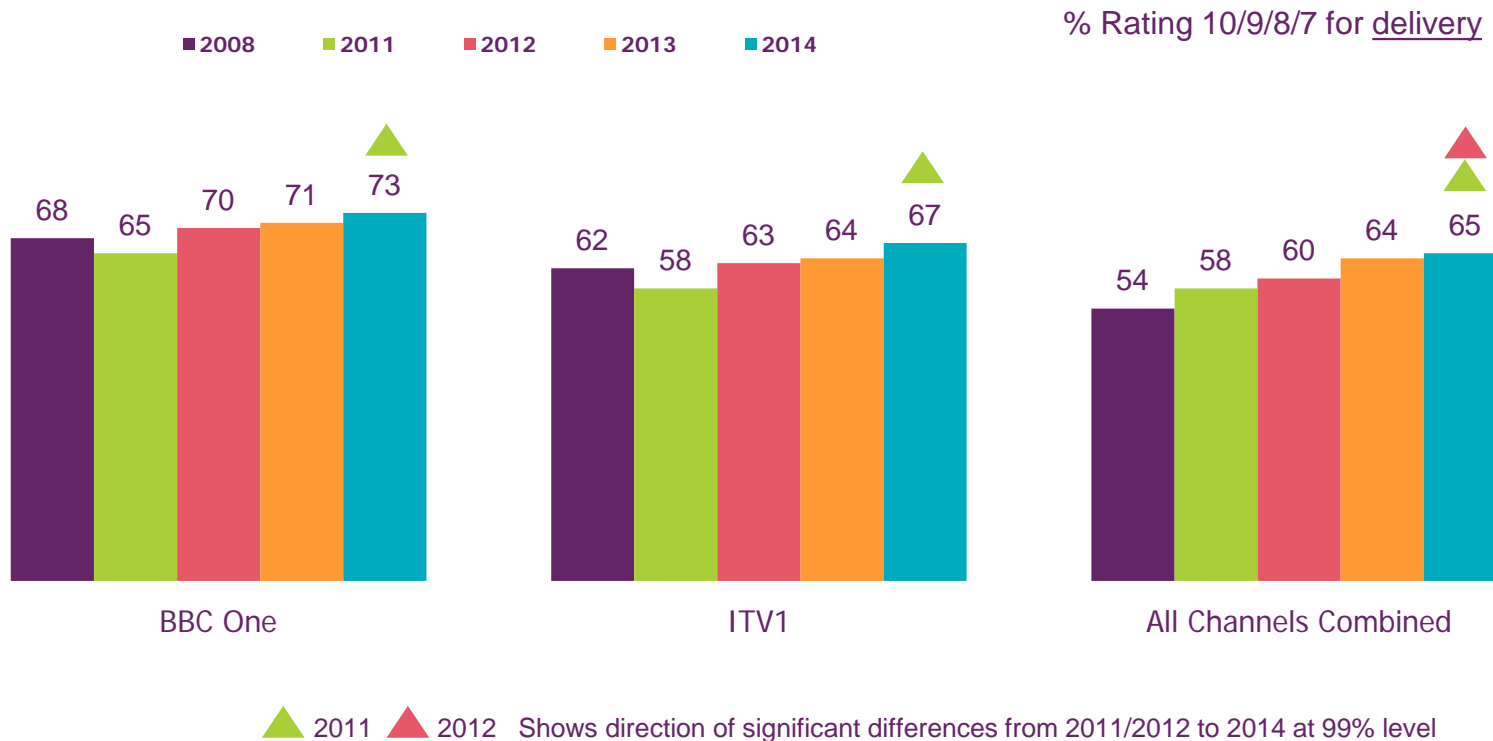
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-reported regular viewers of each channel (BBC One = 4850, 1597, 1683, 1552, 1570; ITV1 = 3587, 1107, 1214, 1235, 1071)

Base for 'All channels combined': All respondents who ever watch any PSB channels (6798, 3079, 2983, 2926, 3066)

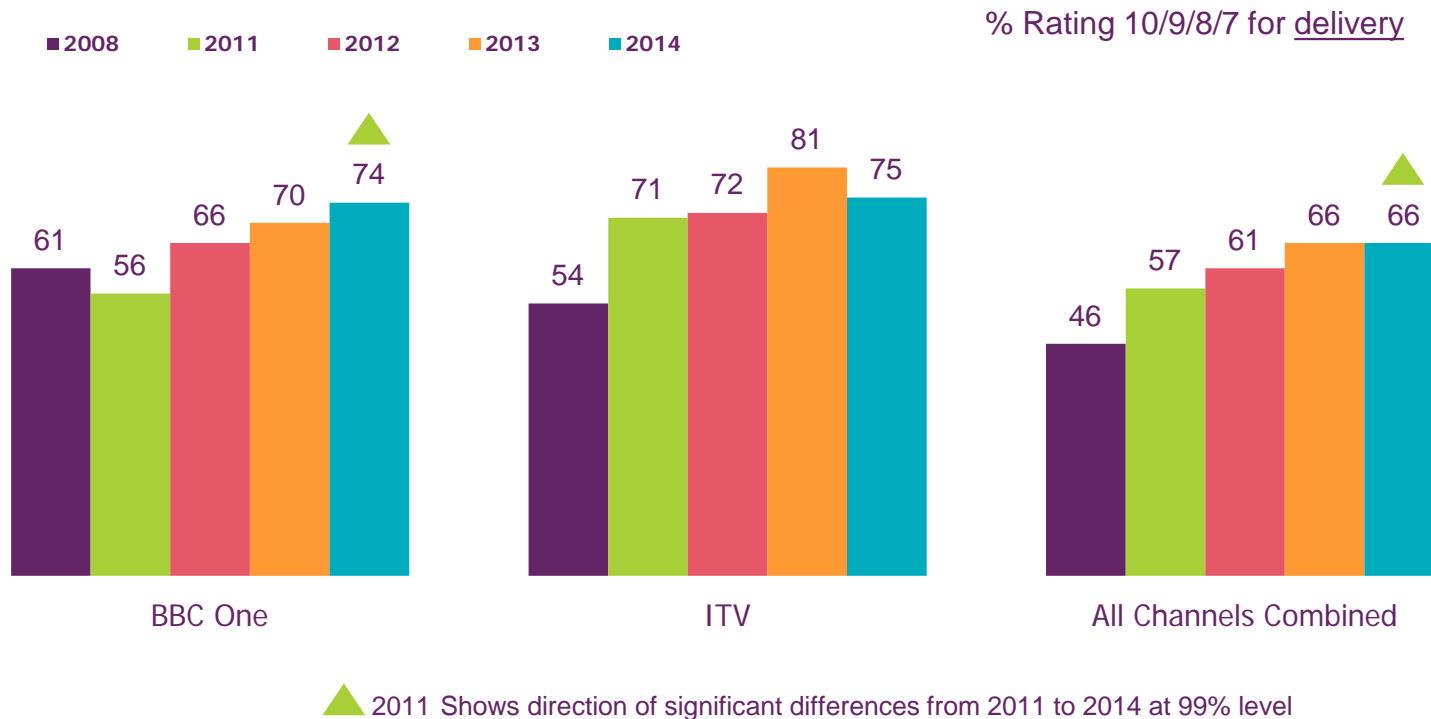
NB: Before 2011 the statement was asked as 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'

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



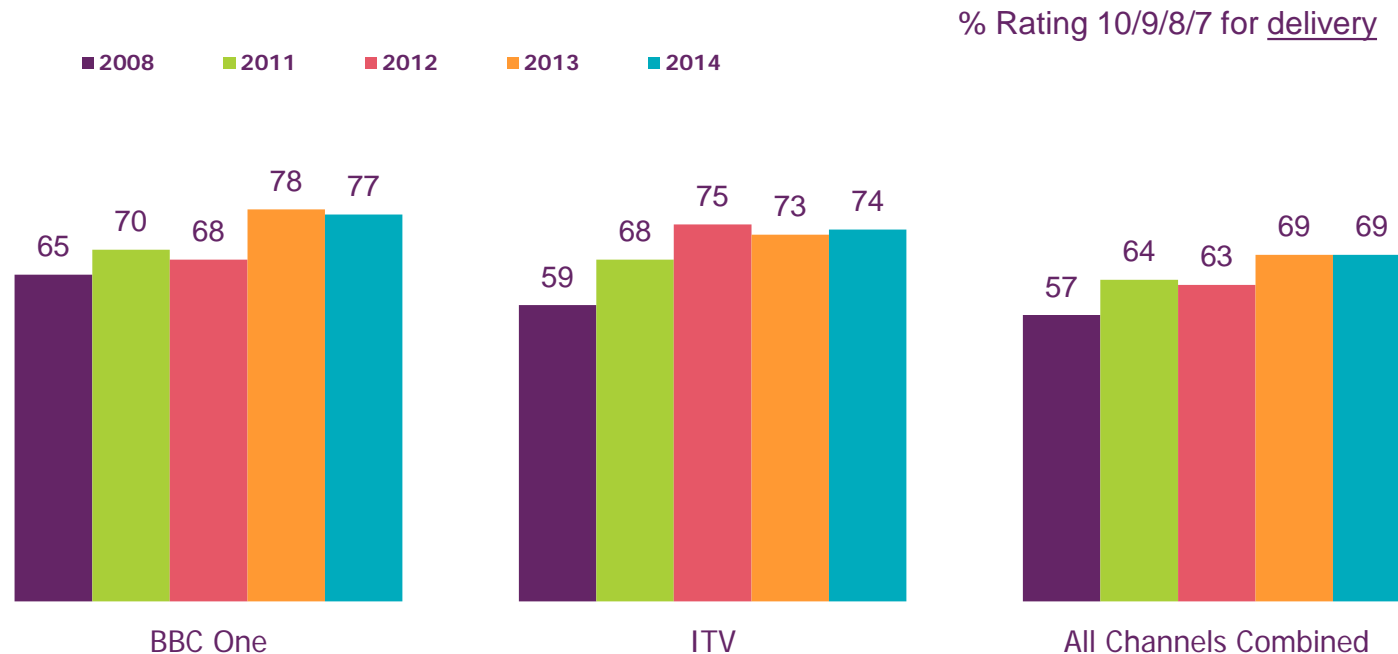
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel
 Base for individual channels: Self-reported regular viewers of each channel in England (BBC One = 2759, 861, 887, 875, 859; ITV1 = 1941, 547, 577, 633, 581)
 Base for 'All channels combined': All respondents in England who ever watch any PSB channels (3850,, 1647, 1593, 1573, 1637)

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 = 687, 234, 289, 238; 240 ITV1 = 508, 189, 214, 200, 151)
 Base for 'all channels combined': all respondents in Scotland who ever watch any PSB channels (997, 499, 493, 488, 510)
 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 25 'Its regional news programmes provide a wide range of good quality news about my area' (based on all respondents in Wales)



No significant differences from 2011/2012/2013 to 2014 at 99% level

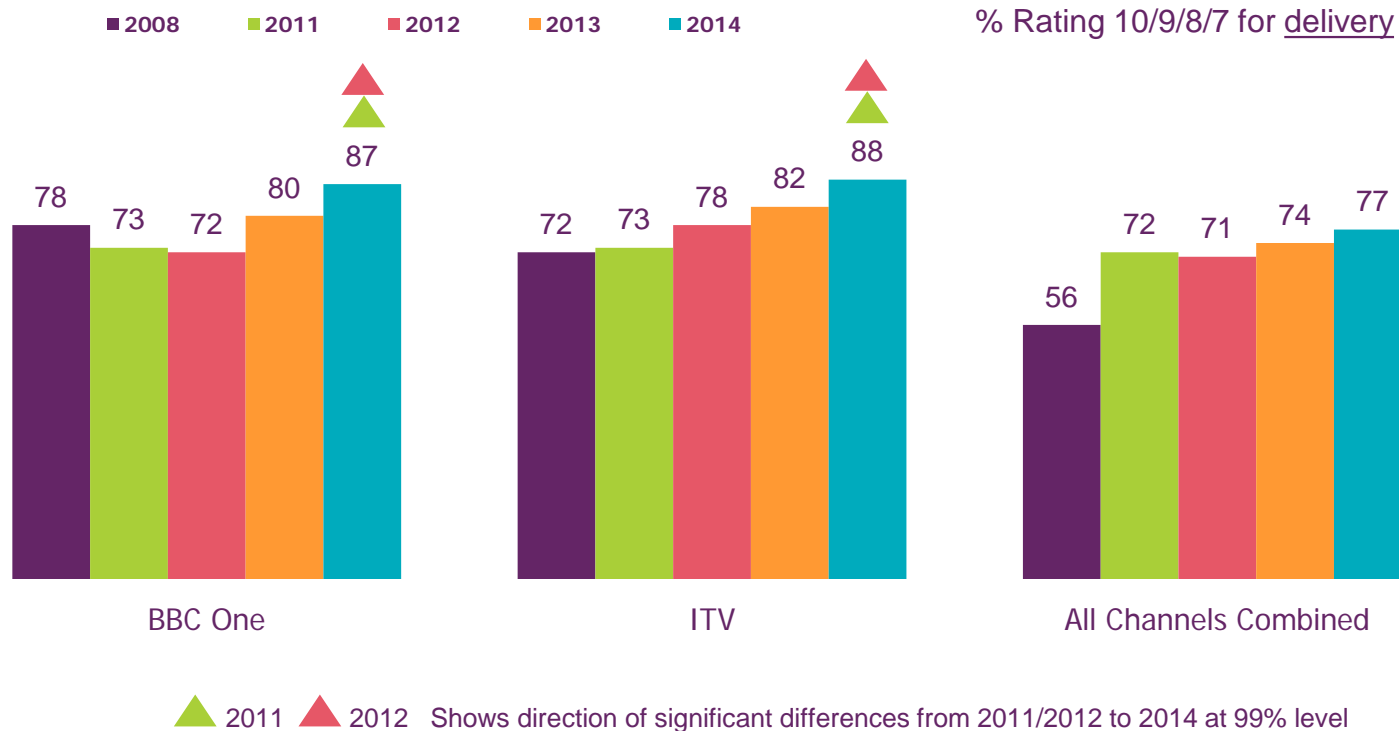
Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for individual channels: Self-reported regular viewers of each channel in Wales. (BBC One = 741, 268, 276, 235, 238; ITV1 = 596, 175, 191, 173, 147)

Base for 'all channels combined': All respondents in Wales who ever watch any PSB channels (975, 474, 447, 433, 457)

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 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 = 663, 234, 231, 204, 233; ITV1 = 542, 196, 232, 229, 192)
 Base for 'all channels combined': All respondents in Northern Ireland who ever watch any PSB channels (976, 459, 450, 432, 462)
 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'

Children's PSB

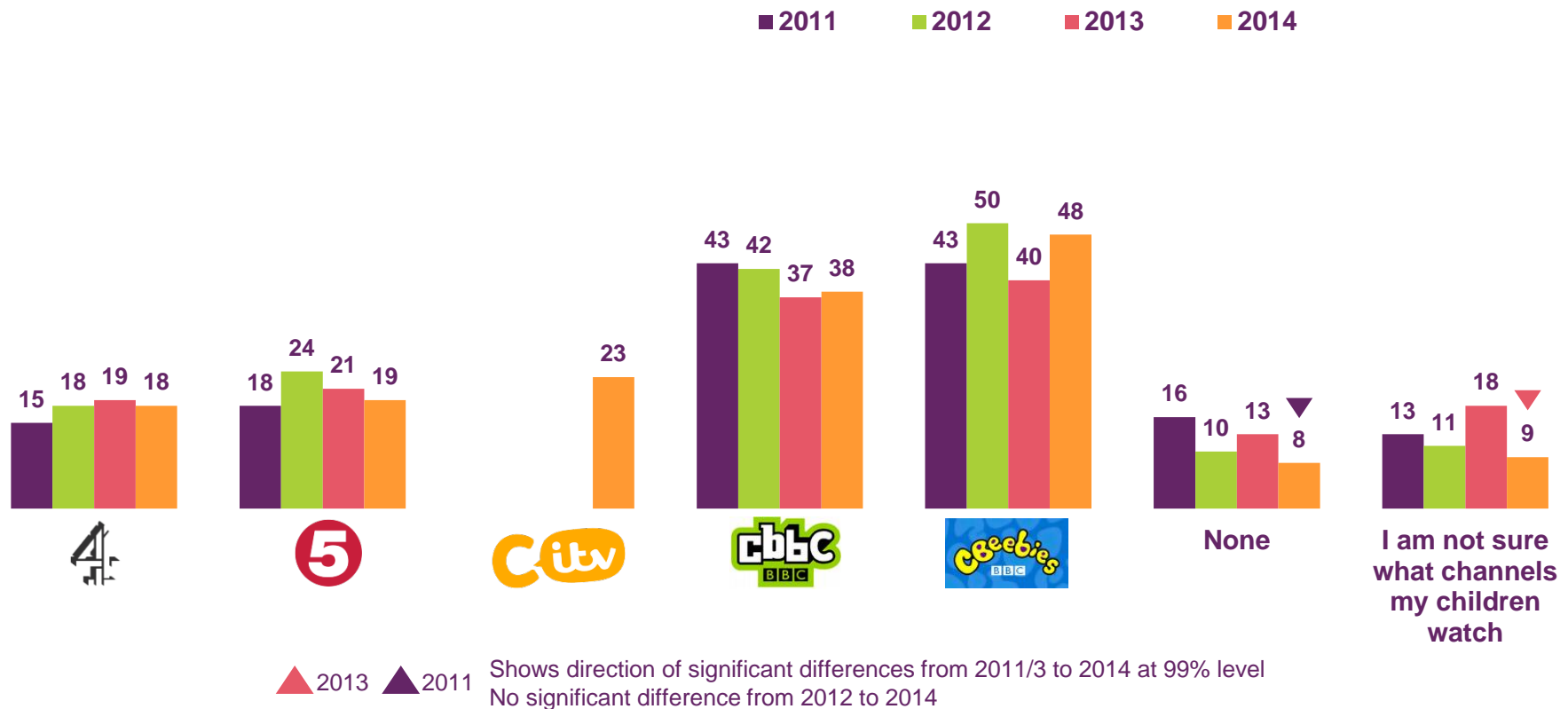
Children's PSB

This section looks in detail at Children's PSB. Children's programming is broadcast on Channel 5 (Milkshake block) and on the dedicated children's channels from the PSB broadcasters and commercial broadcasters.

Key themes

- As seen in previous waves, CBBC and CBeebies were again significantly more likely to be viewed by children than the other channels broadcasting children's PSB content. Compared with 2013, there were no significant changes in viewing of any children's PSB channels, however, significantly fewer parents/carers than last year admitted not knowing which channels their children watch (18% to 9%).
- Parents/carers of children who watch any children's PSB channel continued to rate the importance of children's PSB programming highly with 81% saying 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, continued to receive high ratings on offering *'a wide range of high quality and UK-made programmes for children'* from parents/carers of children regularly watching these in 2014. Ratings were stable compared to last year with 82% rating CBBC highly and 78% CBeebies.
- Although statistically not significant, there seemed to be an upward trend in the proportion of parents/carers of children watching Channel 5 agreeing that the channel offers *'a wide range of high-quality and UK-made programmes for children'* - now at 55%.

Fig 27 Proportion of children that are regular viewers of children's content

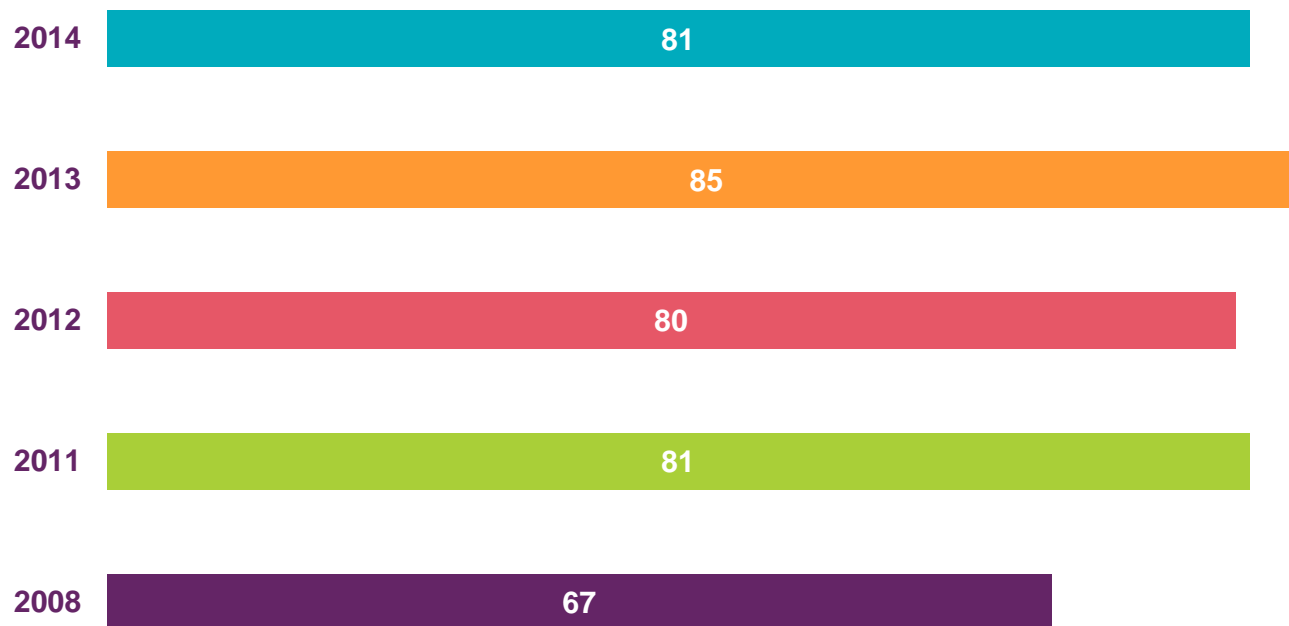


Q On which of these channels does/do your child/children regularly watch programmes aimed specifically at children?
 Base: All responsible for children under 16 (2011=529, 2012=636, 2013=518, 2014=453)

Fig 28 Parents' opinions on the importance of children's PSB

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

% Rating 10/9/8/7 for importance



No significant differences from 2011/2012/2013 to 2014 at 99% level

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.

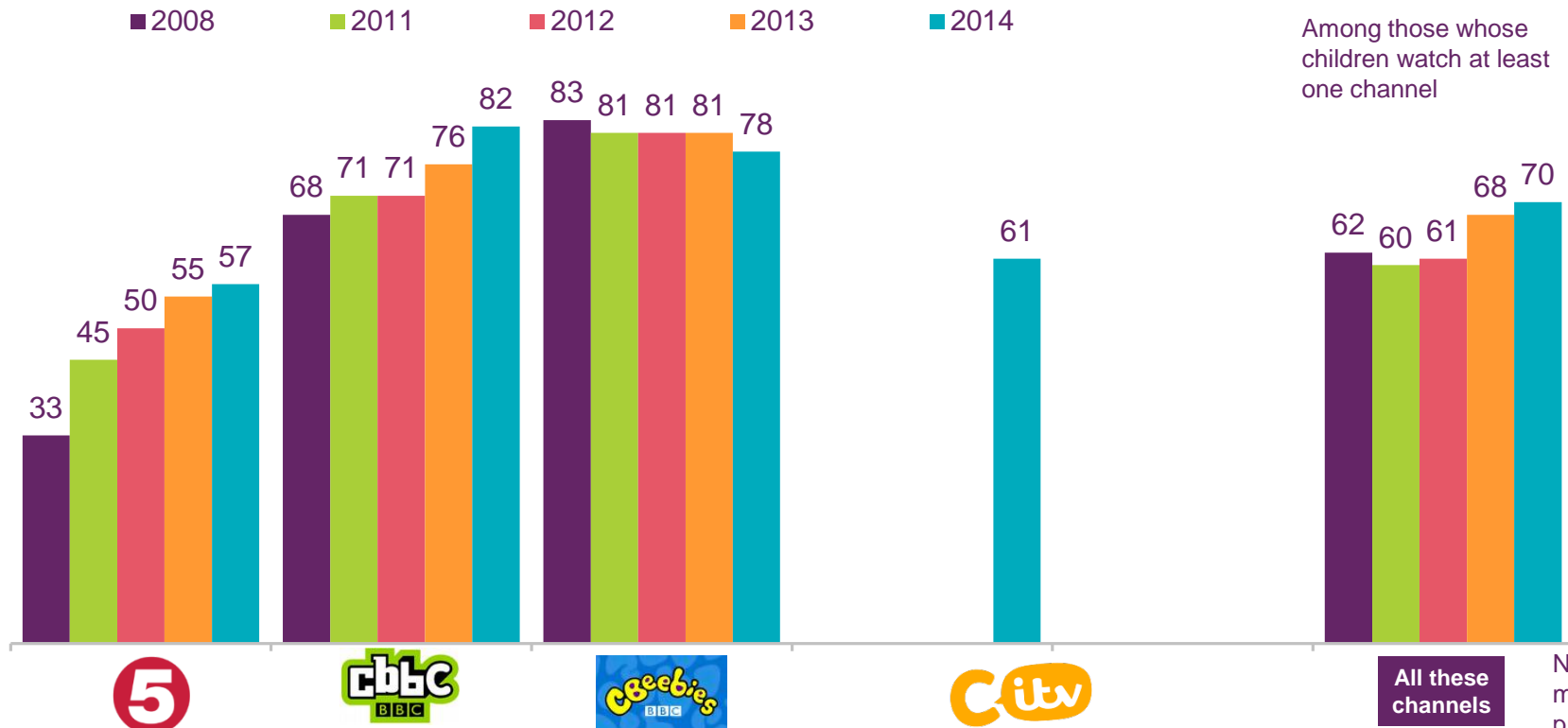
Extent to which the characteristic is important, where 10 means 'extremely important' and 1 means "not at all important" (% rating 10/9/8/7)

Base: 2008 – All in Sample A (2008 = 797); All whose children regularly watch any of those channels BBC One, Channel 5, Cbeebies, CBBC (2011=363, 2012=487, 2013=333, 2014=321)

Fig 29 Parents' opinions on the delivery of children's content

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

% Rating 10/9/8/7 for delivery



Among those whose children watch at least one channel

Note: Asked of more channels prior to 2011

No significant differences from 2011/2012/2013 to 2014 at 99% level

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)

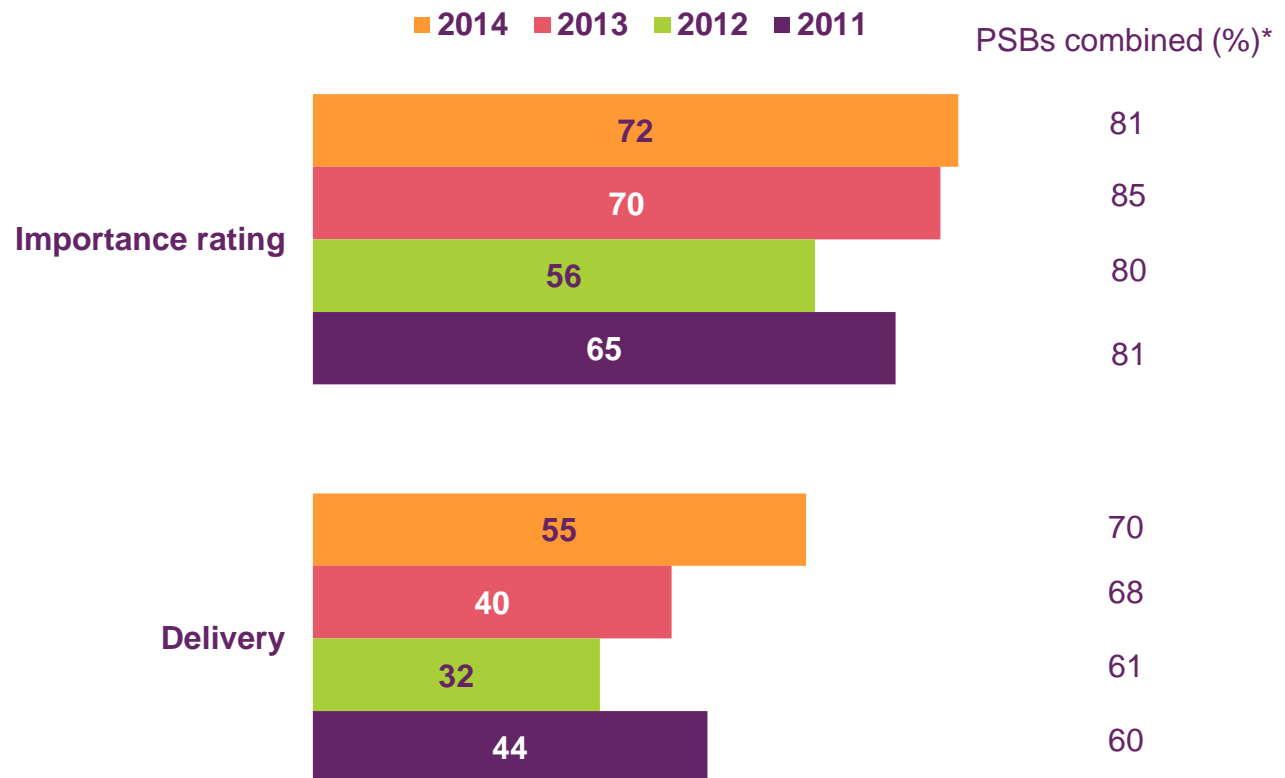
Base for 'all children's' PSB channels: All respondents whose children regularly watch at least one channel (357,1513,1448,363,487,333, 321)

Base for individual channels: Those whose children are regular viewers of each channel featured (Channel Five = 235, 89, 140, 112, 92 CBBC = 403, 180, 271, 203, 181 CBeebies = 416, 218, 320, 218, 214 CITV = 112)

Fig 30 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'
No significant differences from 2011/2012/2013 to 2014 at 99% level

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 (68, 55, 64, 52) – CAUTION SMALL BASE SIZES

Individual PSB channel summaries



PSB channel summaries

- 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.

Key themes

- As on the aggregate level for all PSB channels combined, the ratings for delivery of most Purposes and Characteristics were consistent on the individual channel level.
- While measures for BBC Two and Channel 5 have not seen significant improvements in the delivery of any of the Characteristics and Purposes from 2013 (the scores remain static), there were increases for some statements for other channels.
- BBC One has seen a significant positive uplift in its perceived delivery of two Purposes: *'It shows high quality soaps or dramas made in the UK'* (59% to 67%) and *'Its programmes show different kinds of cultures within the UK'* (53% to 63%); and one Characteristic: *'It shows programmes with new ideas and different approaches'* (52% to 62%). The latter two statements also increased on an aggregate level, for all PSBs combined.
- ITV saw shifts in similar statements as BBC One. It was rated significantly higher for its delivery of three Purposes: *'It shows interesting programmes about history, sciences or the arts'* (34% to 42%), *'It shows high quality soaps or dramas made in the UK'* (68% to 74%) and *'Its programmes show different kinds of cultures within the UK'* (43% to 52%); and one Characteristic: *'It shows programmes with new ideas and different approaches'* (48% to 57%).
- Opinions of Channel 4's delivery of PSB Purposes and Characteristics amongst its regular viewers was almost entirely static compared to 2013 apart from one Purpose: *'It shows high quality soaps or dramas made in the UK'* (40% to 52%).



Fig 31 BBC One

% Rating 10/9/8/7 for delivery

PSBs combined



▲ Shows direction of significant differences from 2013 to 2014 at 99% level

Base: Self-reported regular viewers of BBC One 2014 (1570), 2013 (1552)

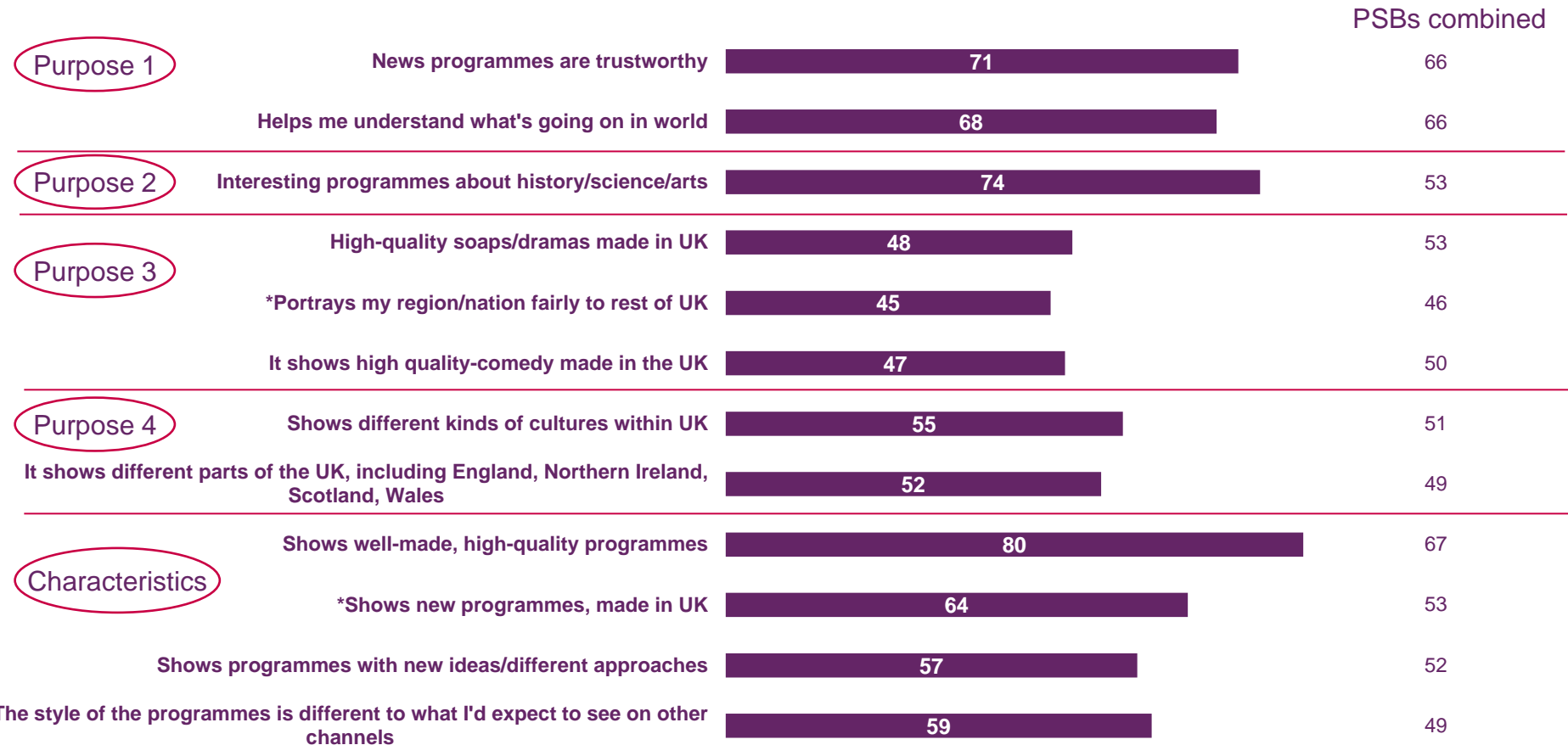
*Slightly amended wording of statements since 2011. **This statement was only rated by parents of children that watch children's shows on BBC One





Fig 32 BBC Two

% Rating 10/9/8/7 for delivery



No significant differences from 2013 to 2014 at 99% level

Base: Self-reported regular viewers of BBC Two 2014 (539), 2013 (618)

*Slightly amended wording of statements since 2011

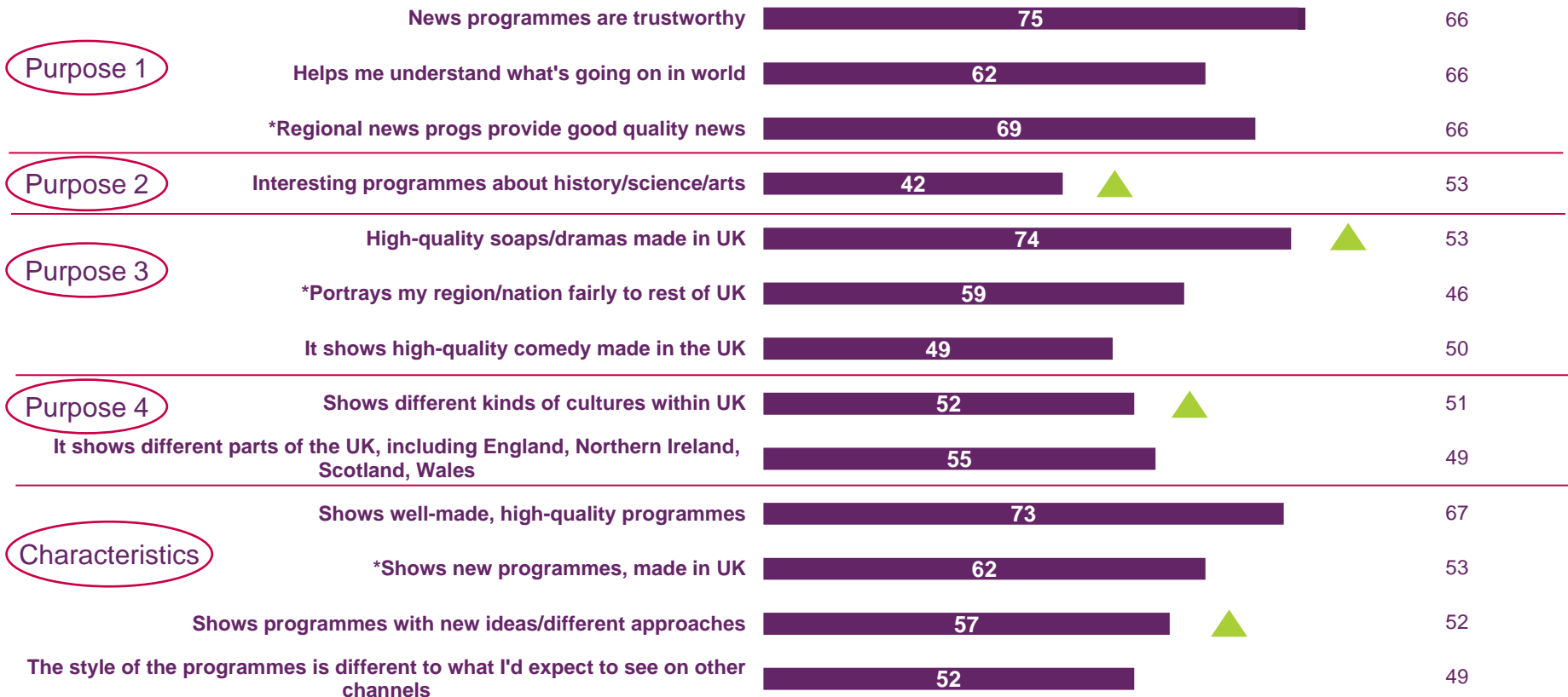




Fig33 ITV

% Rating 10/9/8/7 for delivery

PSBs combined



▲ Shows direction of significant differences from 2013 to 2014 at 99% level



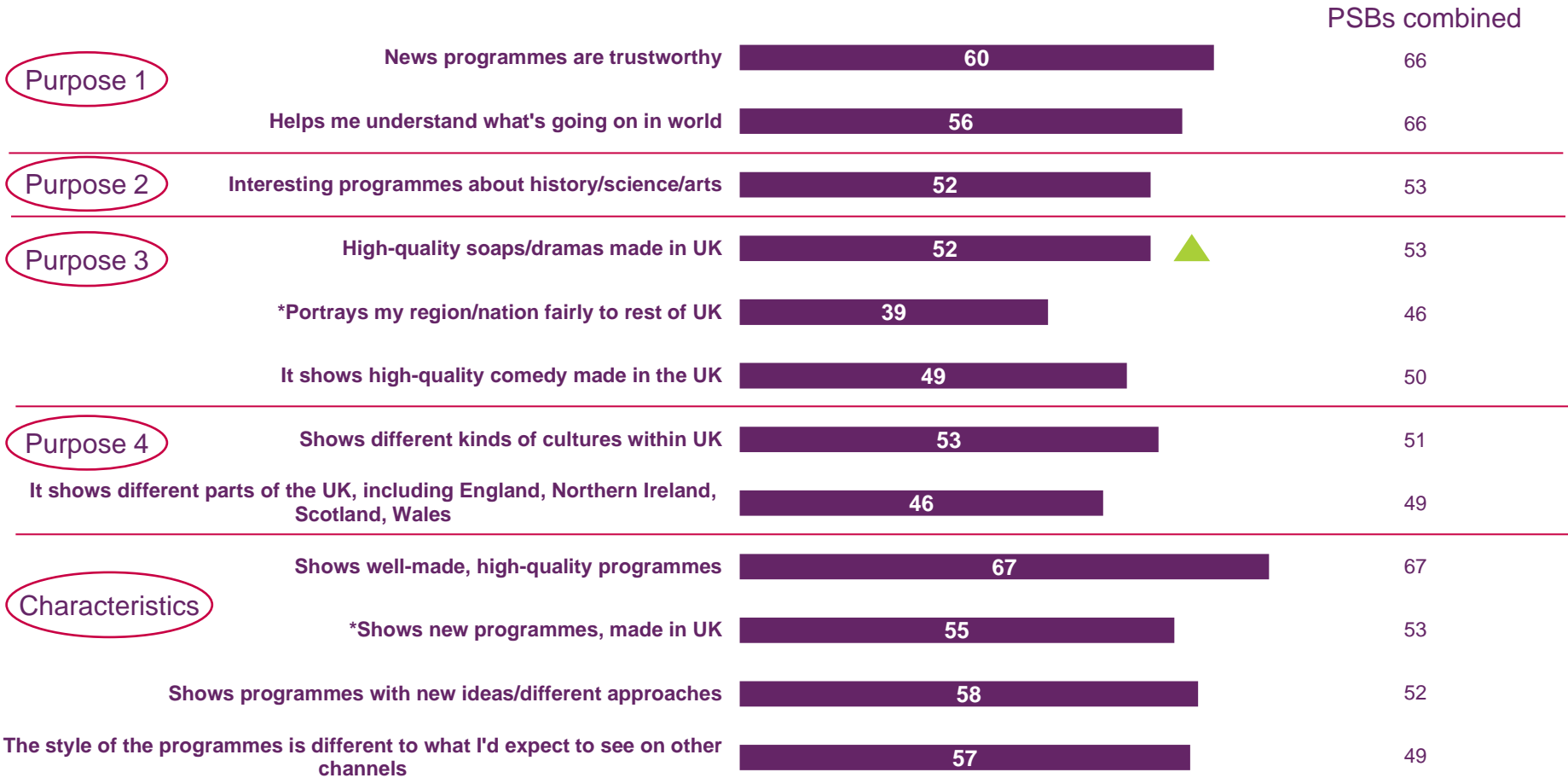
Base: Self-reported regular viewers of ITV1 2014 (1071), 2013 (1235)

*Slightly amended wording of statements since 2011



Fig 34 Channel 4

% Rating 10/9/8/7 for delivery



▲ Shows direction of significant differences from 2013 to 2014 at 99% level

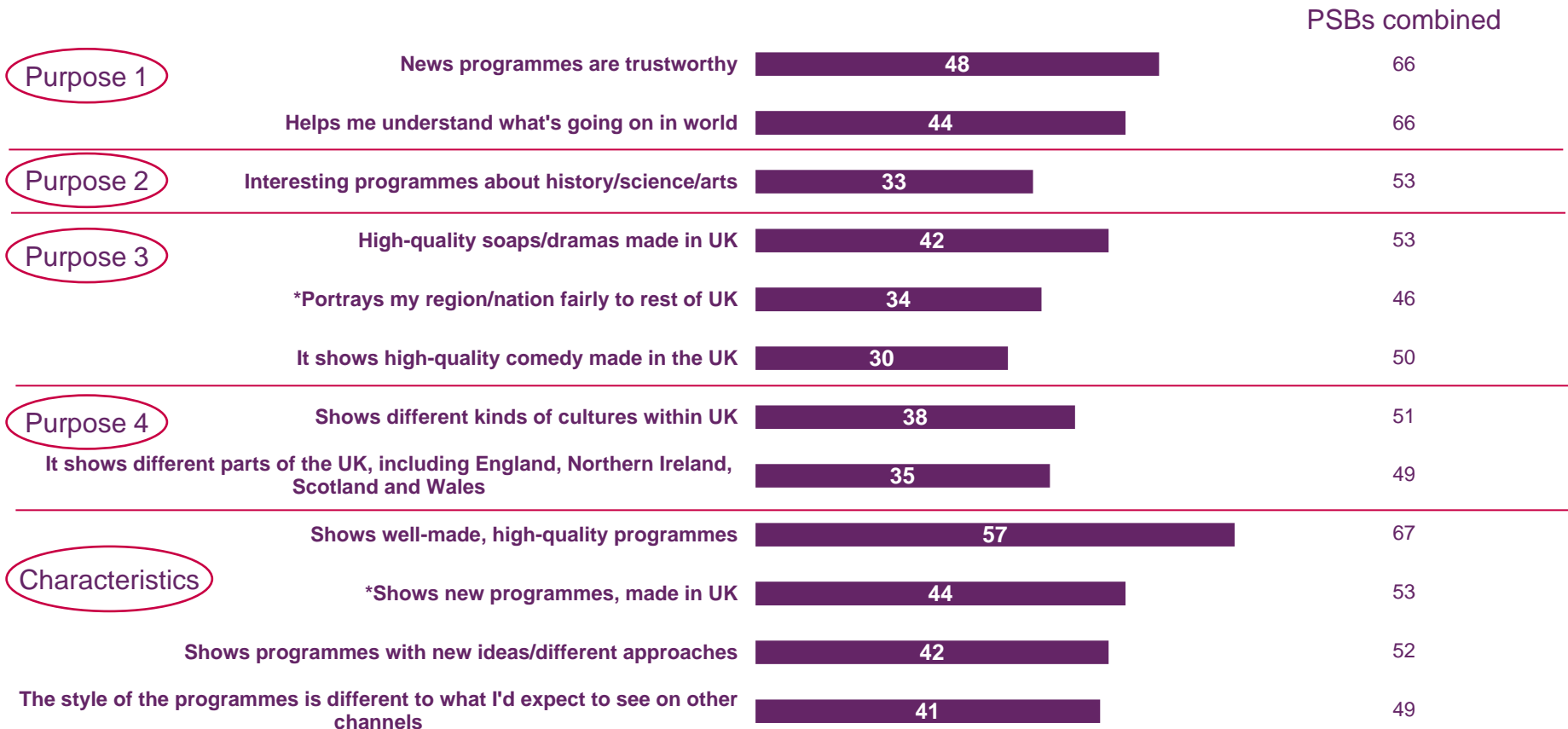
Base: Self-reported regular viewers of Channel 4 2014 (534), 2013 (591)

*Slightly amended wording of statements since 2011



Fig 35 Channel Five

% Rating 10/9/8/7 for delivery



No significant differences from 2013 to 2014 at 99% level

Base: Self-reported regular viewers of Channel Five 2014 (360), 2013 (360)

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

BBC portfolio 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.

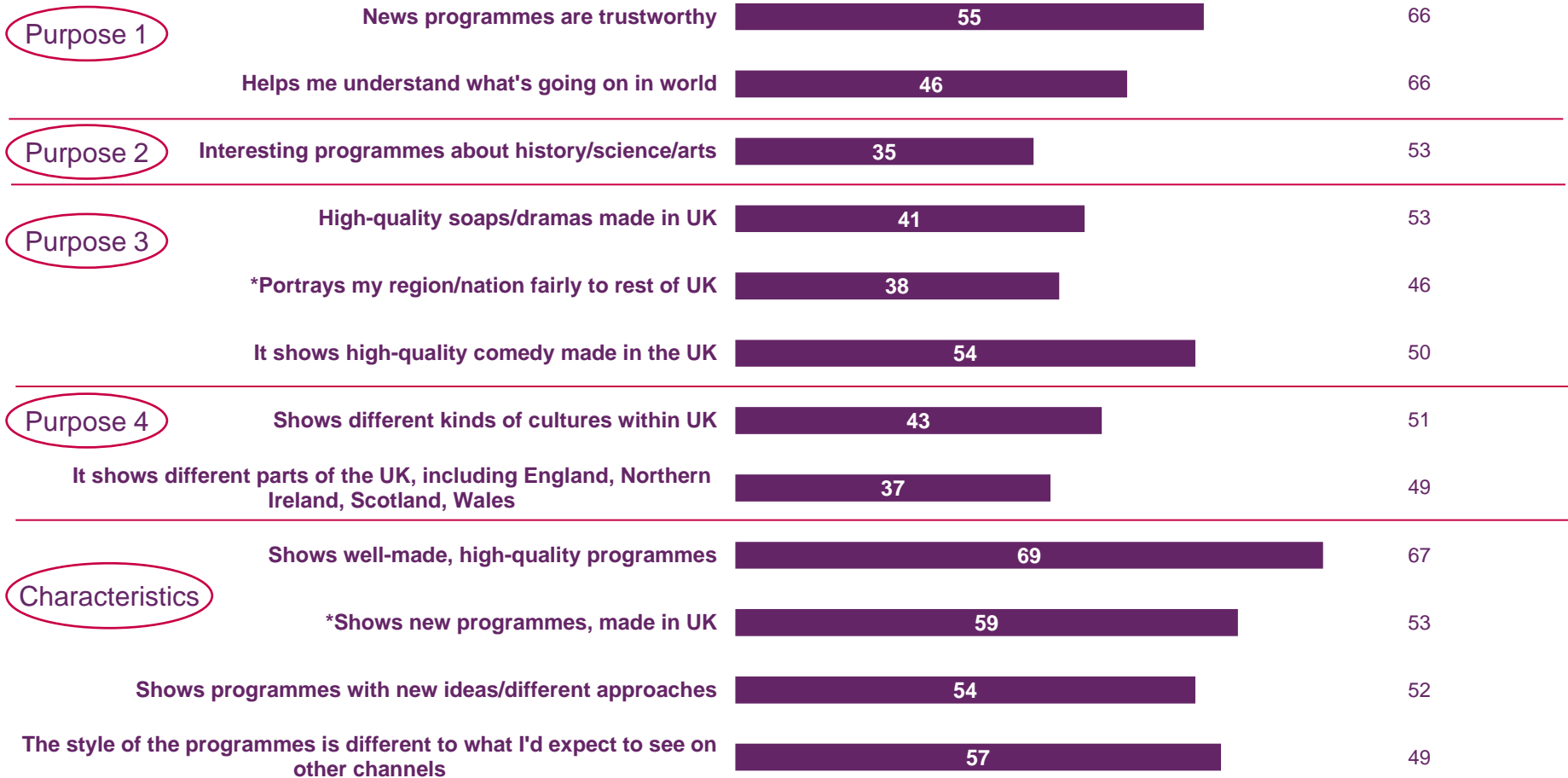
Key themes

- There were no significant differences year-on-year for any of the BBC portfolio PSB channels' delivery of PSB Purposes or Characteristics.
- However, there were some differences between BBC Three and BBC Four channels. Specifically, BBC Four scored higher on its delivery of the statement *'interesting programmes about history/science/arts'* (67% vs. 35%), while BBC Three scored higher for *'shows high quality comedy made in the UK'* (54% vs. 28%).
- As in the previous year, the highest individual rating for a BBC portfolio channel was for BBC News for the statement *'helps me understand what's going on in the world'* (88%), one of only two measures asked about BBC News.

Fig 36 BBC Three

% Rating 10/9/8/7 for delivery

PSBs combined



No significant differences from 2013 to 2014 at 99% level

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).

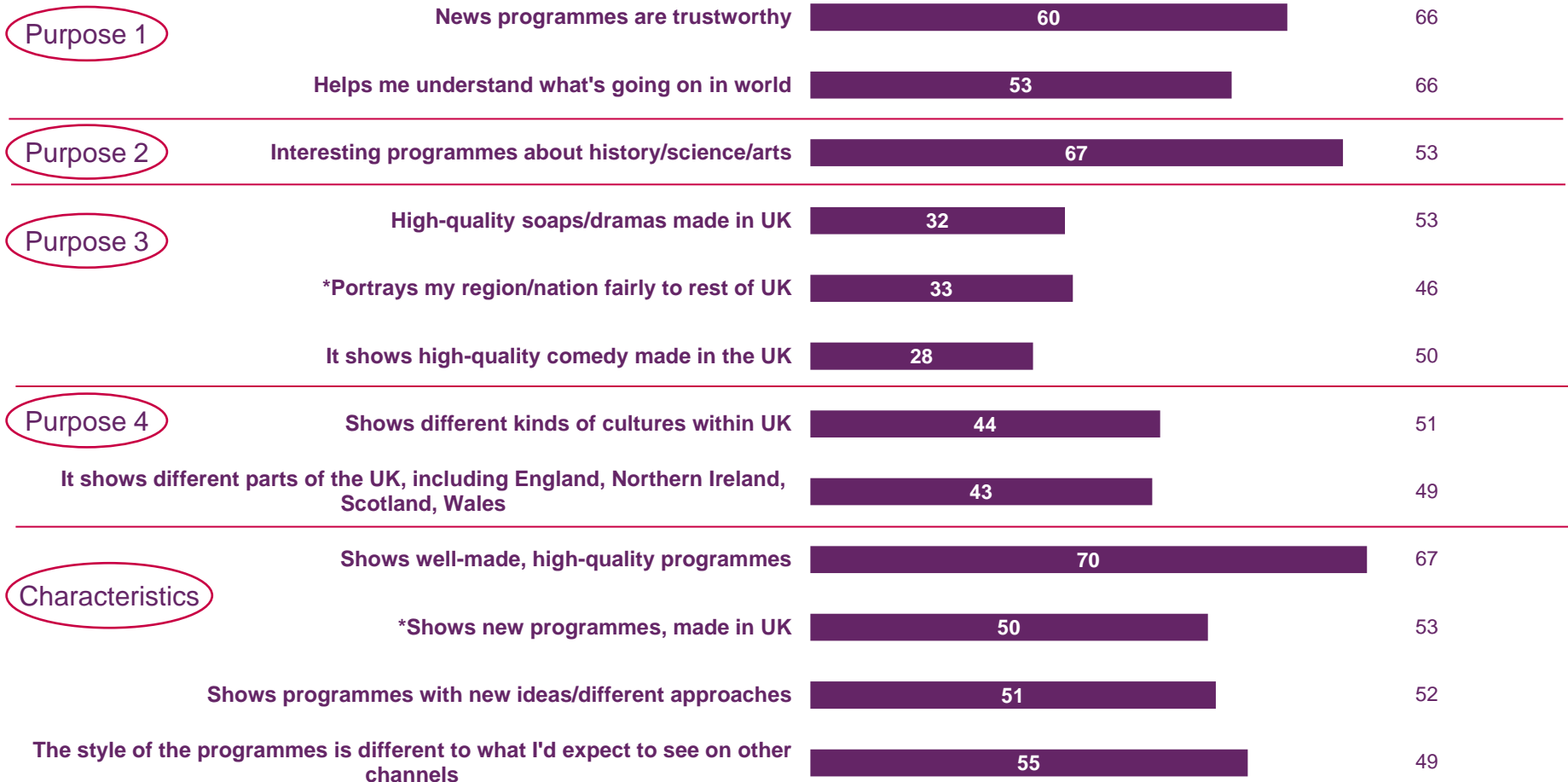
Base: Self-reported regular viewers of BBC Three 2014 (253), 2013 (278)

*Slightly amended wording of statements since 2011

Fig 37 BBC Four

% Rating 10/9/8/7 for delivery

PSBs combined



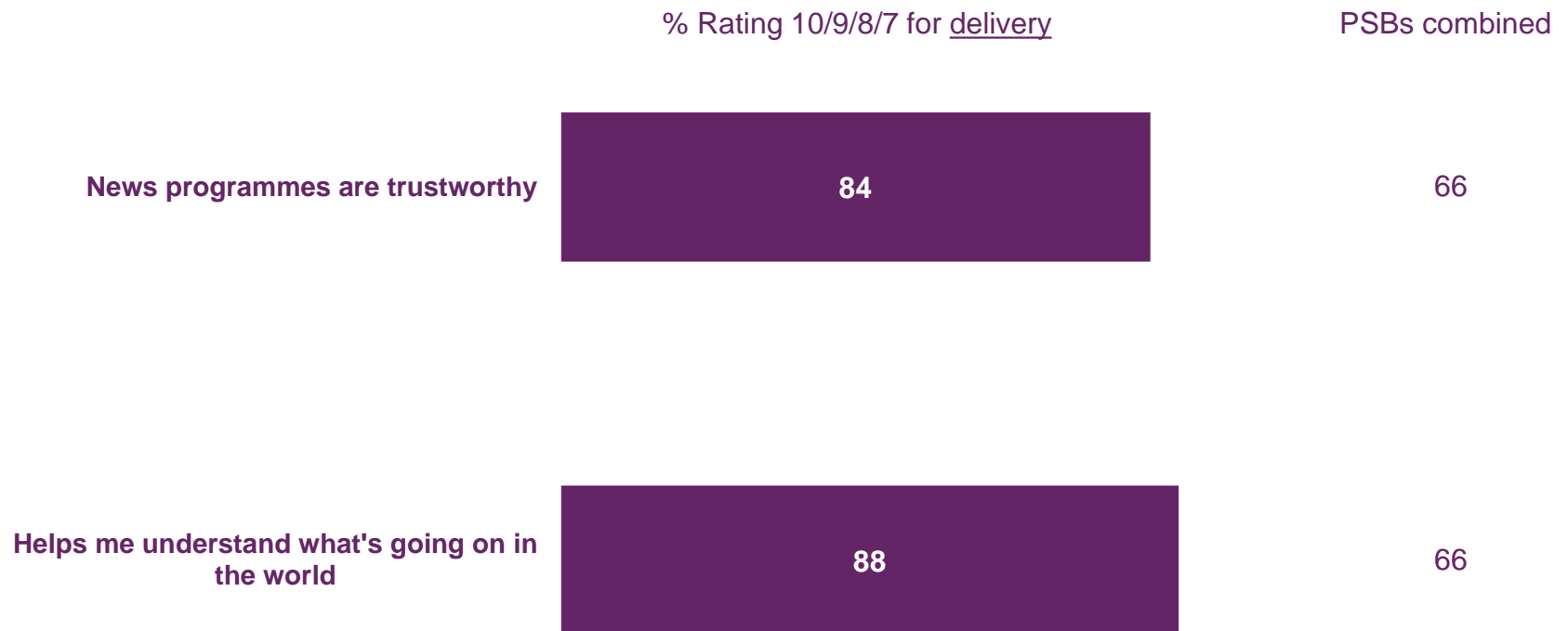
No significant differences from 2013 to 2014 at 99% level

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 2014 (179), 2013 (150)

*Slightly amended wording of statements since 2011

Fig 38 BBC News



No significant differences from 2013 to 2014 at 99% level



Summary: S4C

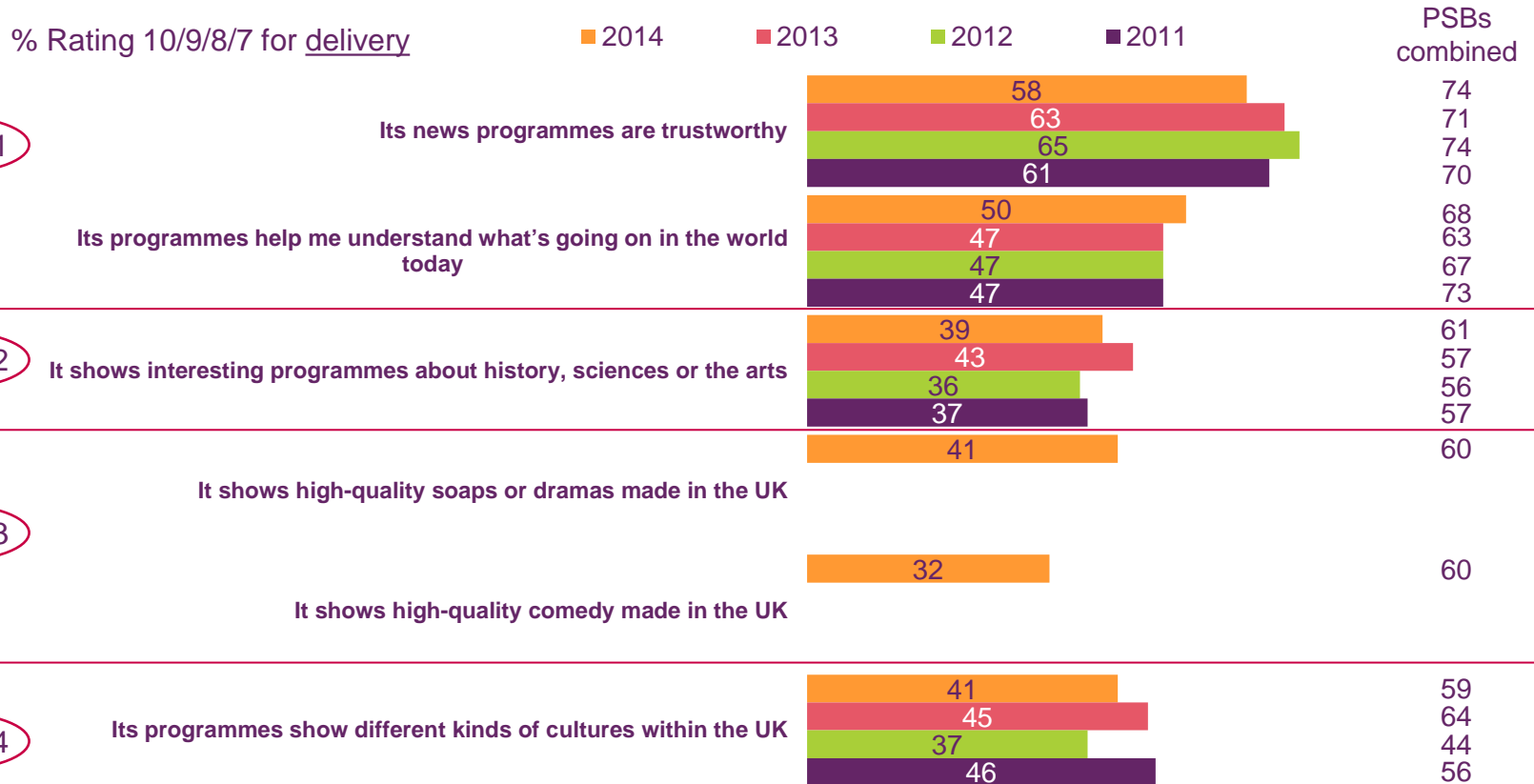
The Welsh Authority had the statutory responsibility to provide S4C Digidol (digital) services for viewers in Wales. The Communications Act specifies that the S4C services must include News and Current Affairs programming, hence fewer Purposes are asked about.

- 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.

Key themes

- There were no significant changes year-on-year for any of the Purposes or Characteristics amongst regular viewers of S4C Welsh language programming in 2014.

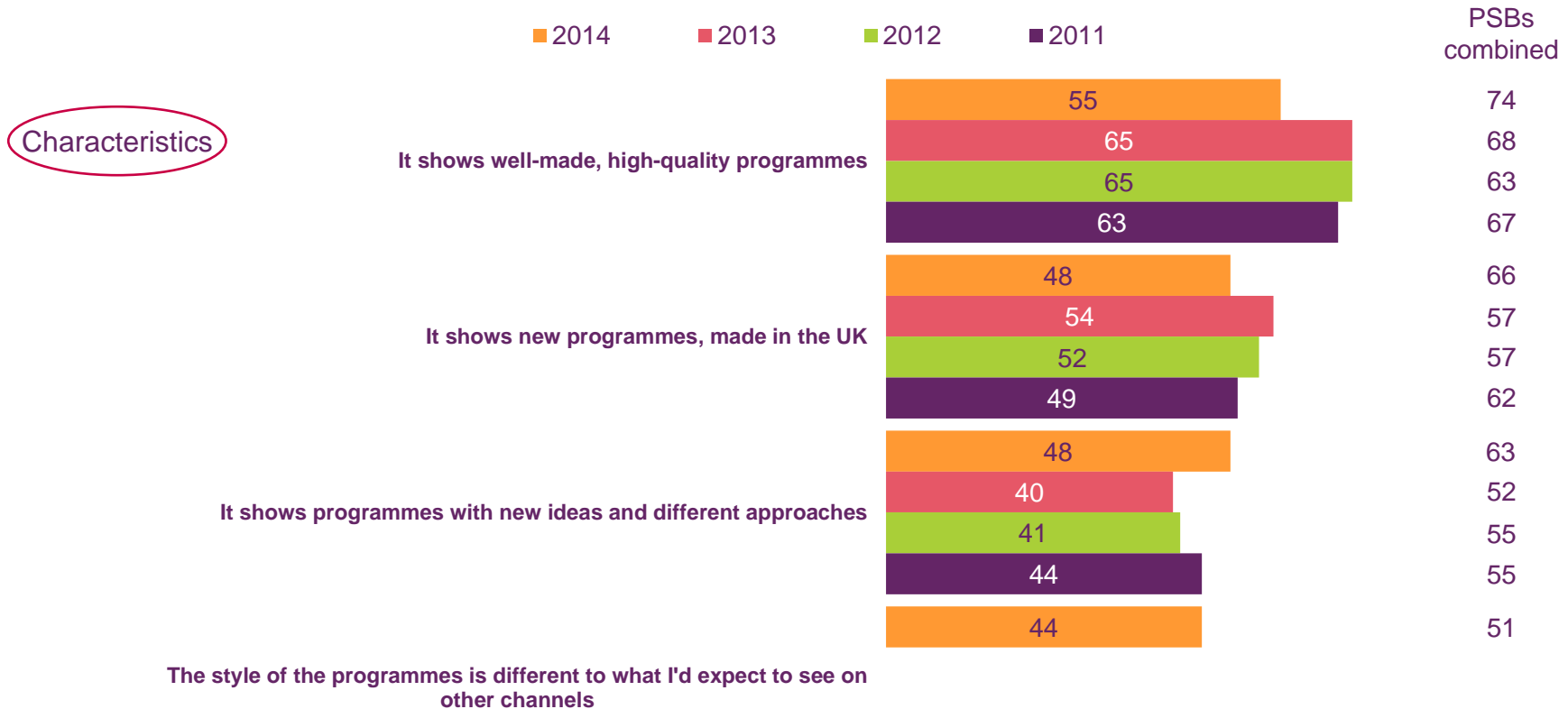
Fig 39 S4C Welsh language viewer opinions of delivery of PSB purposes



No significant differences between 2014 and earlier years at 99% level

Fig 40 S4C Welsh language viewer opinions of delivery of PSB characteristics

% Rating 10/9/8/7 for delivery



No significant differences between 2014 and earlier years at 99% level

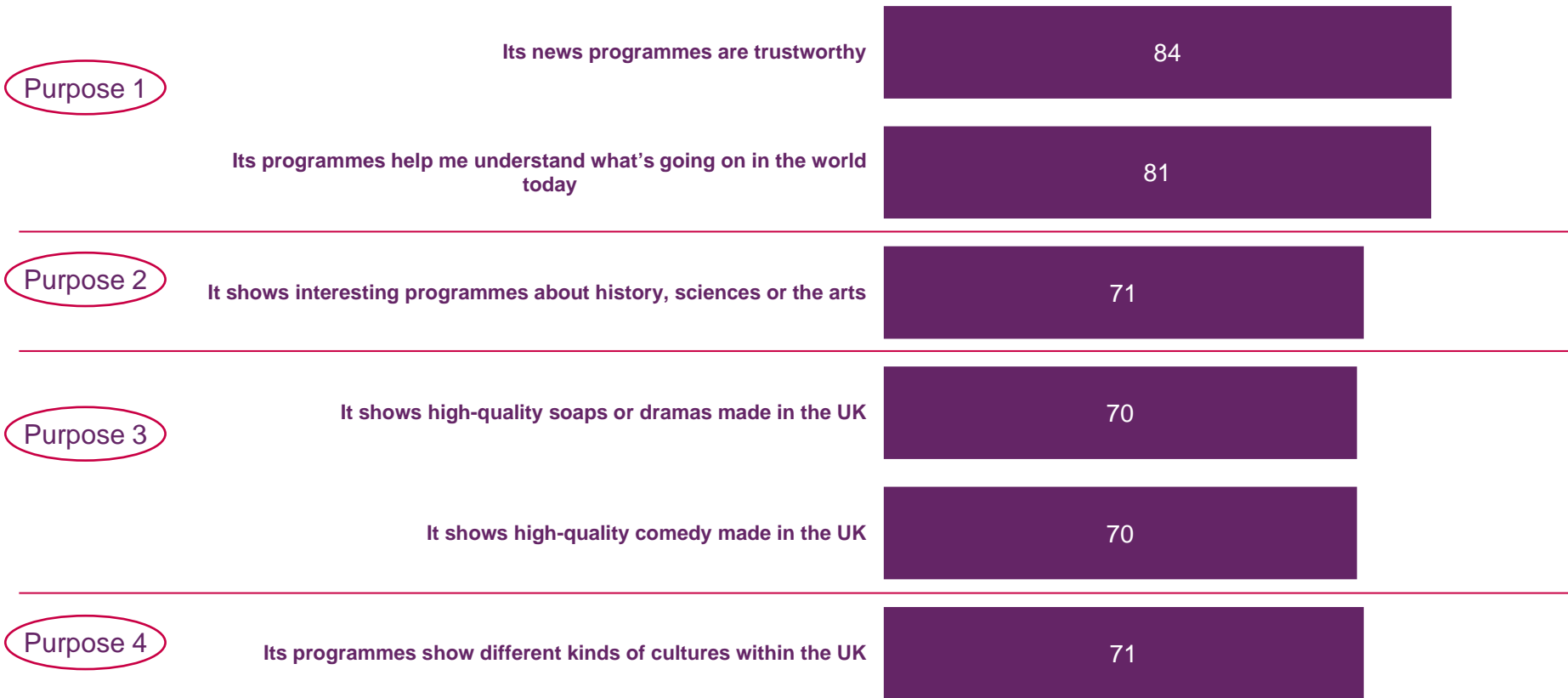
Extent to which the characteristic applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all'
 Base: Self-reported regular viewers of S4C (153)



Fig 41 S4C Welsh language viewer opinions on importance of PSB purposes

% Rating 10/9/8/7 for importance

■ 2014 Importance rating



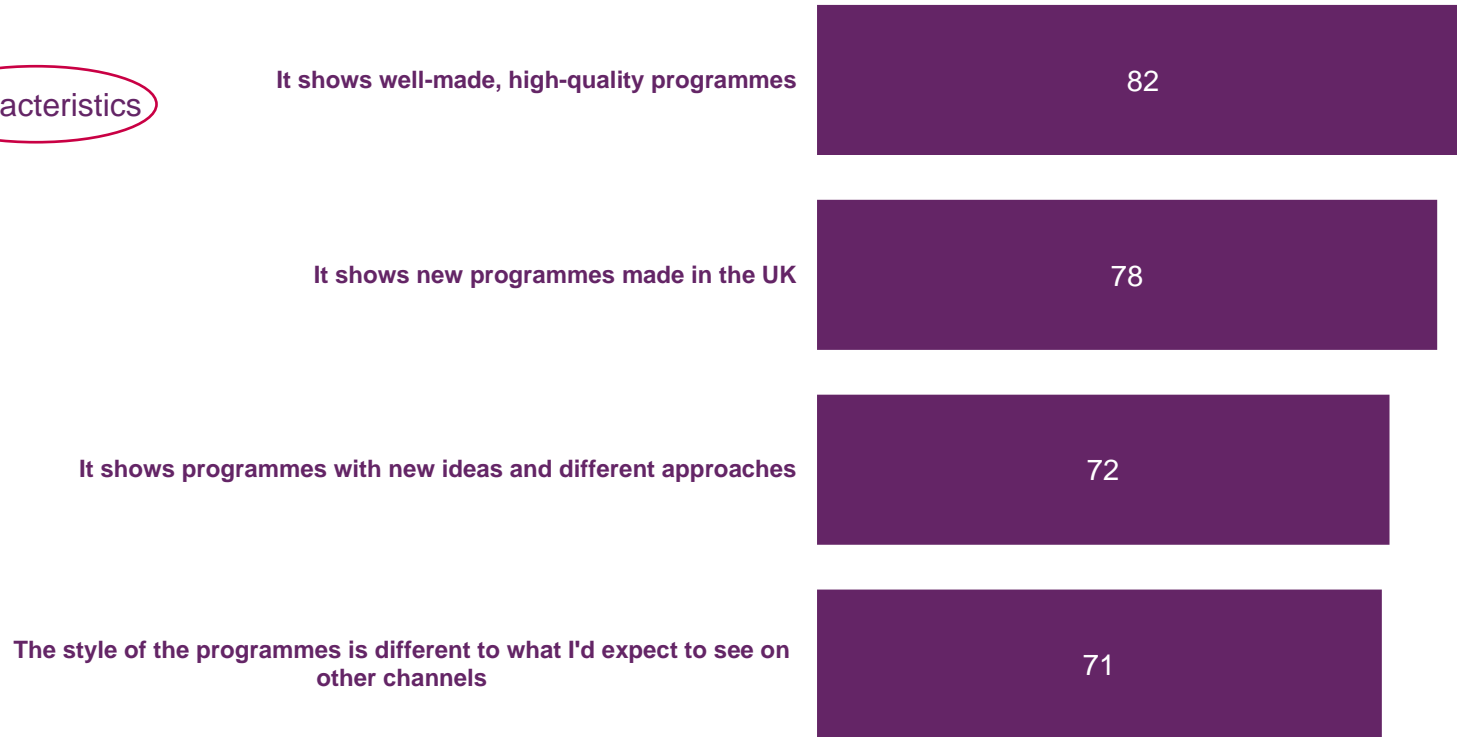
Extent to which it is important the characteristic applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all'
 Base: Self-reported regular viewers of S4C (153)

Fig 42 S4C Welsh language viewer opinions on importance of PSB characteristics

% Rating 10/9/8/7 for importance

■ 2014 Importance rating

Characteristics



Extent to which it is important 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 (153)

Summary: BBC Alba

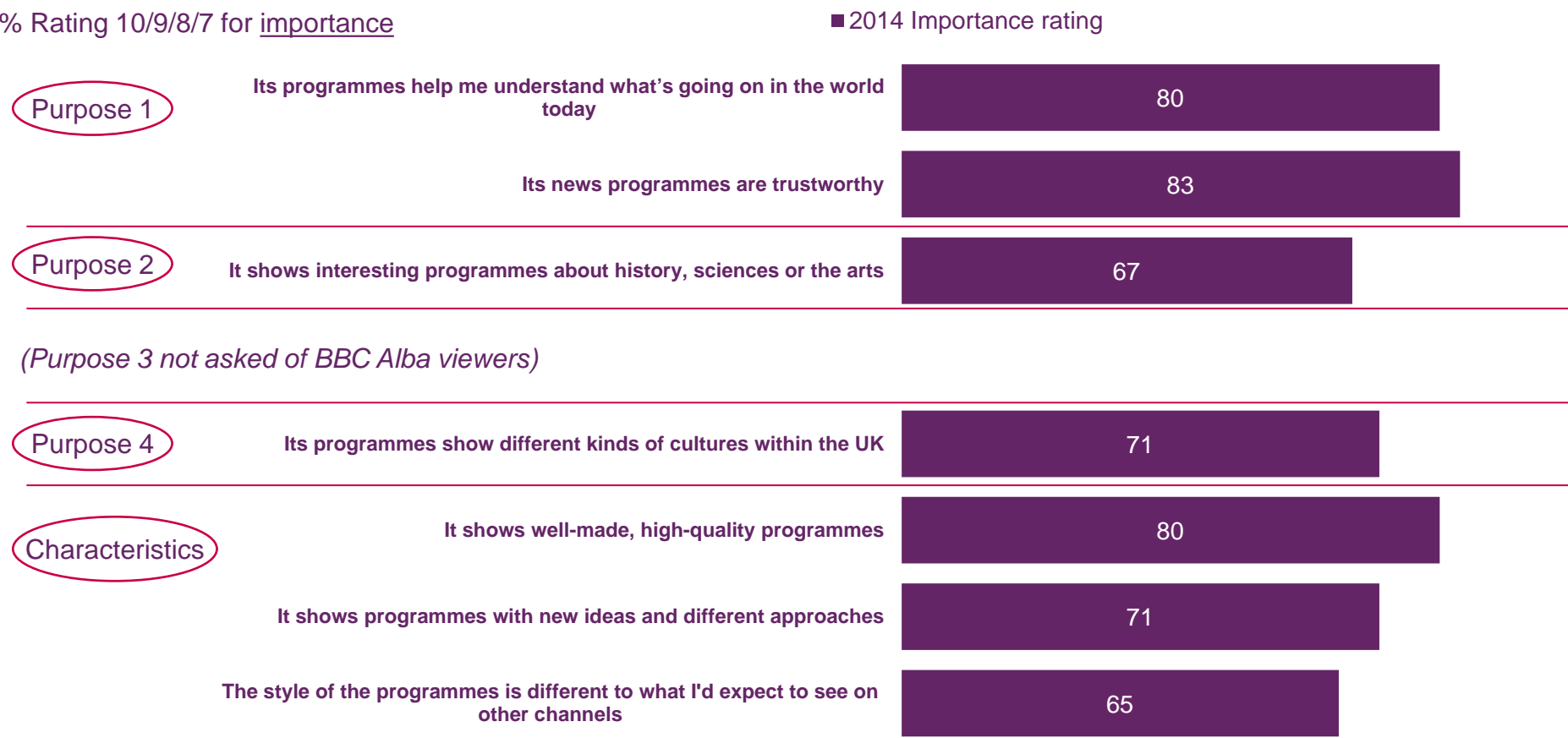
- The remit of BBC Alba is to offer a mix of genres, including television news and weather. It should aim to serve Scottish Gaelic speakers, those learning the language, those that might wish to learn, and those interested in the language and culture. It should aim to reflect and support Gaelic culture, identity and heritage. In order to provide relevant information about audience views relating to BBC Alba programming in Scottish Gaelic, the PSB Tracker has been boosted in Scotland in 2014. Opinions are based on *regular or occasional* viewers of BBC Alba. The PSB Tracker results reported here are based on the Scottish boost sample.
- The PSB Tracker asks viewers of Scottish Gaelic language programming on BBC Alba how they rate BBC Alba on achieving the PSB purposes and characteristics.

Key themes

- For regular or occasional viewers of BBC Alba Scottish Gaelic language programming in 2014, *Purposes 1* statements relating to news programmes were rated most important by at least four in five of regular viewers to the channel
- The statement *'it shows well-made, high-quality programmes'* was also rated as important by 80% of regular viewers to the channel.
- In terms of delivery, Purpose 1 statements: *'its programmes help me understand what's going on in the world today'* was rated highly by 46% and *'its news programmes are trustworthy'* rated highly by 49% of regular viewers to the channel.
- The channel was also rated as delivering on the characteristic statement *'it shows well-made, high-quality programmes'* by over half (54%) of regular viewers to the channel.



Fig 43 BBC Alba viewer opinions on importance of PSB purposes and characteristics



Extent to which it is important 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 BBC Alba (316)

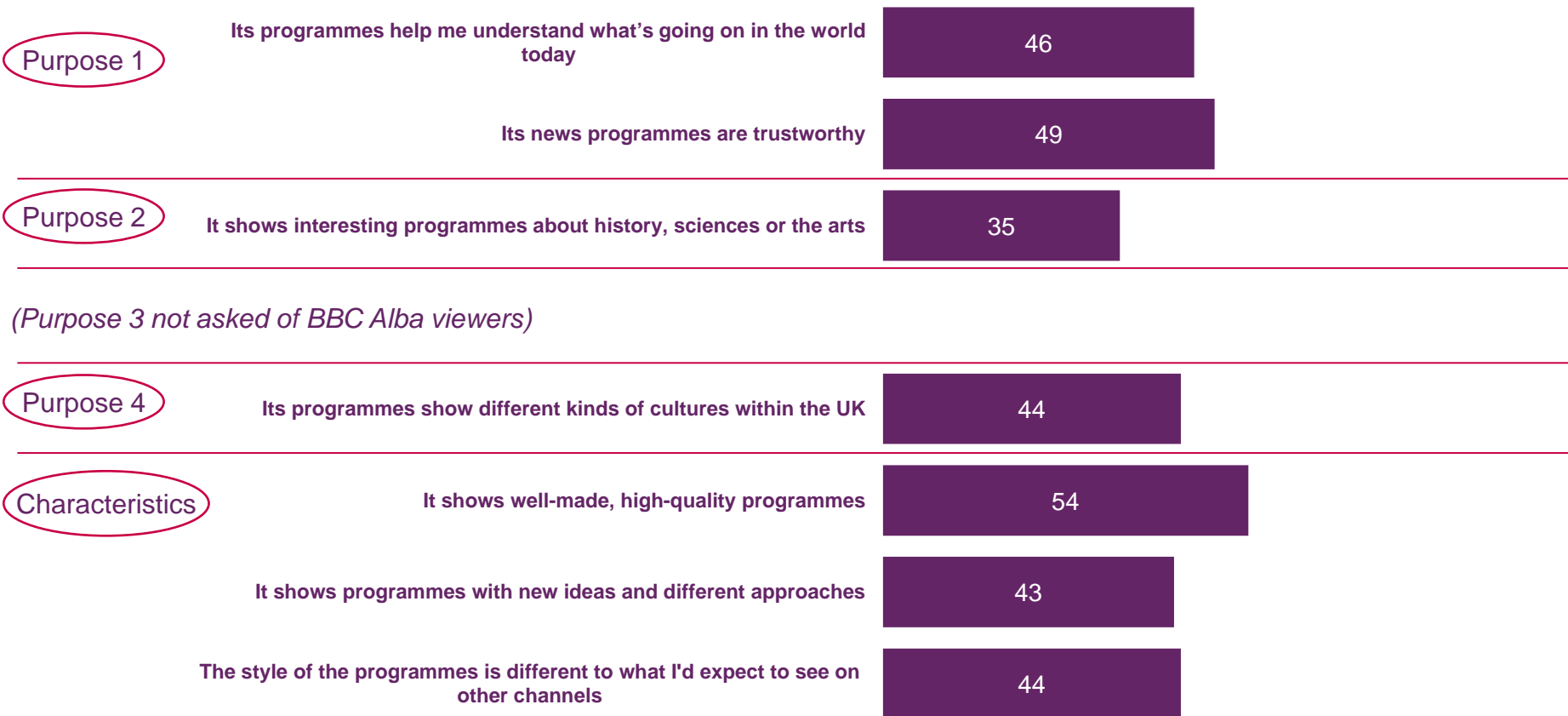




Fig 44 BBC Alba viewer opinions of delivery of PSB purposes and characteristics

% Rating 10/9/8/7 for delivery

■ 2014 Delivery rating



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 BBC Alba (316)



PSB website use and online viewing

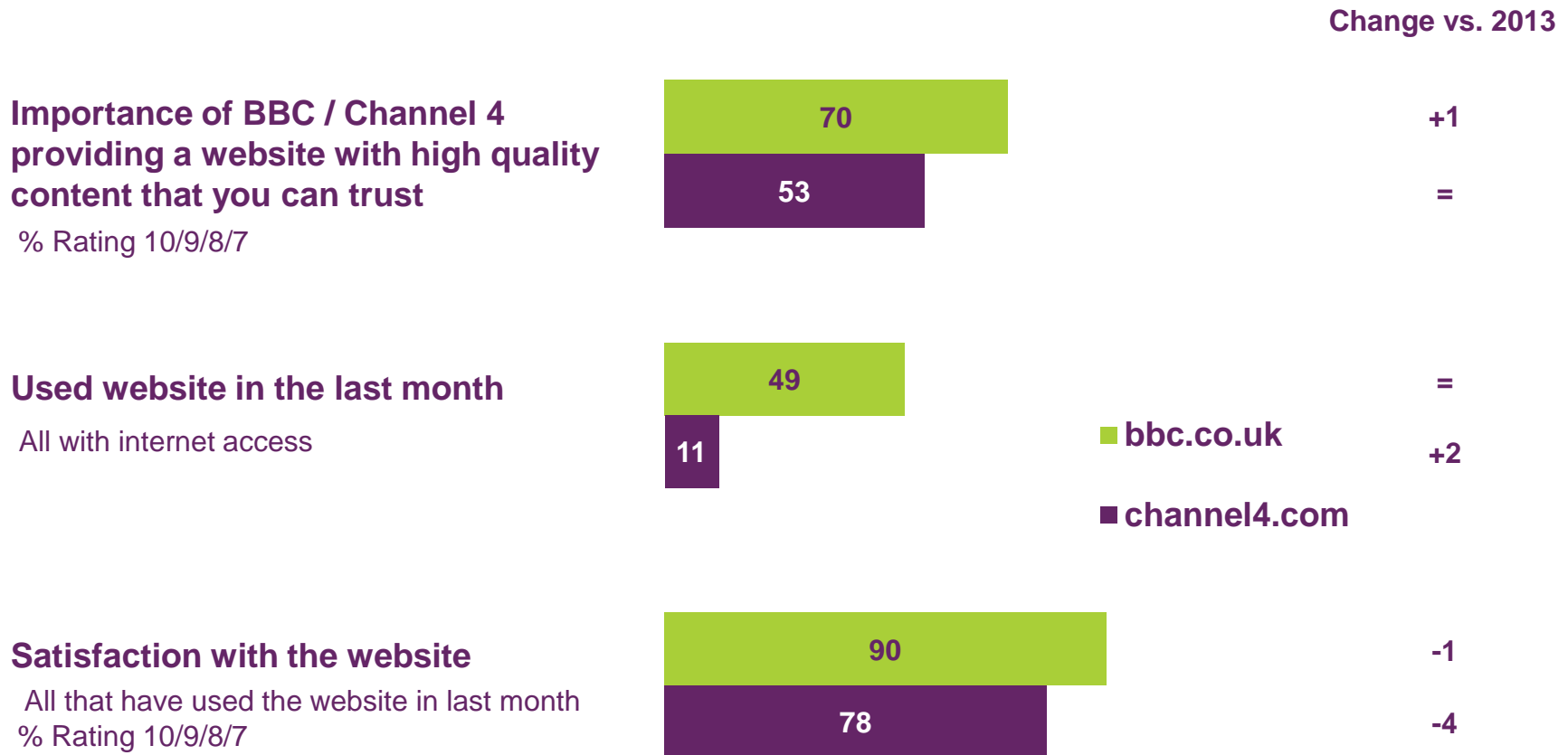
PSB website use and online viewing

This section looks at usage of the PSB channels' websites (BBC and Channel 4 only) and catch up services.

Key themes

- 70% 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*' - static from 2013 (71%). The importance of providing such a website by Channel 4 was also unchanged from 2013 at 53%.
- The levels of those with internet access actually using the programmes' websites in the last month was similarly unchanged since 2013 – from 49% for bbc.co.uk and from 11% for channel4.com. Satisfaction with using the websites also remained high (90% for bbc.co.uk and 78% for channel4.com).
- The proportion with internet access who used the internet to watch or download programmes or films increased significantly from 2013 (38% to 43%), with significant year on year increases for 25-34 year olds (from 44% in 2013 to 55% this year) and those over 55 (from 24% in 2013 to 32% in 2014).
- The usage of BBC and 4oD remained static from 2013 at 44% and 17% respectively, while satisfaction was also unchanged.
- 70% of all respondents felt that it was important (i.e. gave a rating of 10/9/8/7) that broadcasters provide catch-up services (e.g. BBC iPlayer, 4OD etc.) that allow viewers to watch previously broadcast programmes.

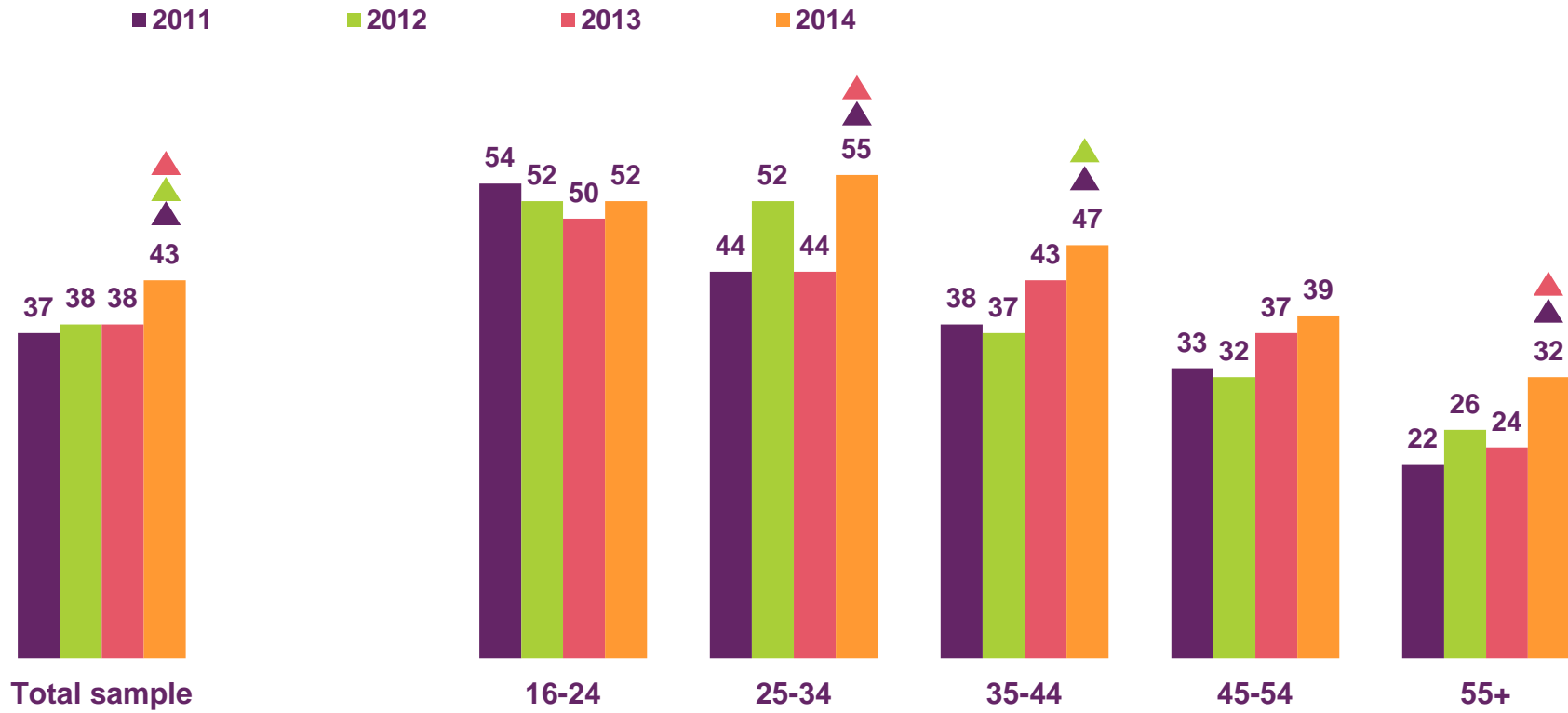
Fig 45 Attitudes towards BBC and Channel 4 online platforms



No significant differences from 2013 to 2014 at 99% level

Base: All (2013=3028, 2014=3158), All with internet access (2013=2417, 2014=2429), All that have used this website in last month: (bbc.co.uk 2013=1165, 2014=1182, channel4.com 2013=210, 2014=266)

Fig 46 Online viewing

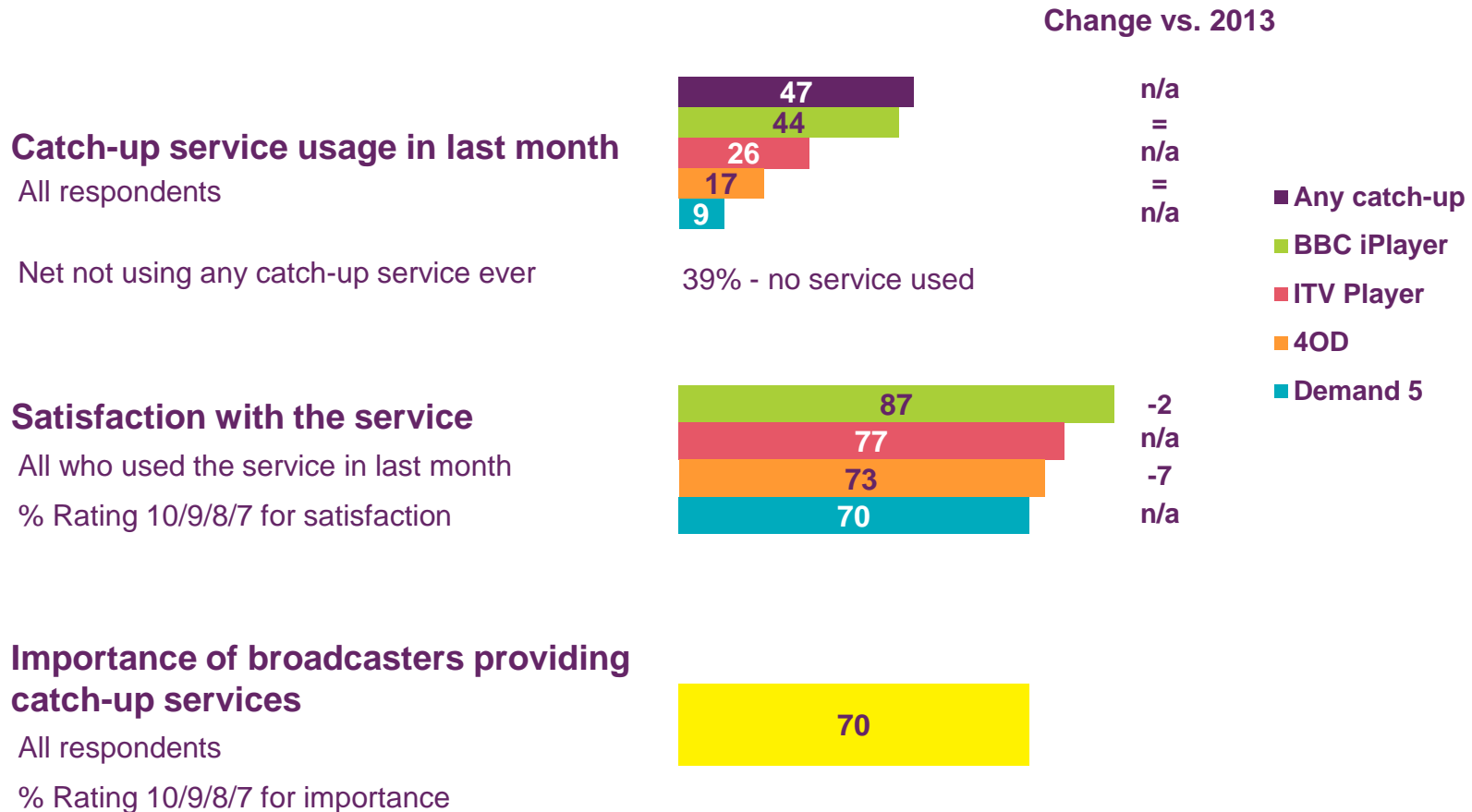


▲ 2013 ▲ 2012 ▲ 2011 Shows direction of significant differences from 2011/2012/2013 to 2014 at 99% level

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

Base: All with internet access (,2295,2356,2417, 2429), 16-24 (392,400,398, 398), 25-34 (647, 426, 427, 427), 35-44 (501, 495, 519, 463), 45-54 (410,433,412, 456), 55+ (,582,602,661, 685)

Fig 47 Catch-up services



No significant differences from 2013 to 2014 at 99% level

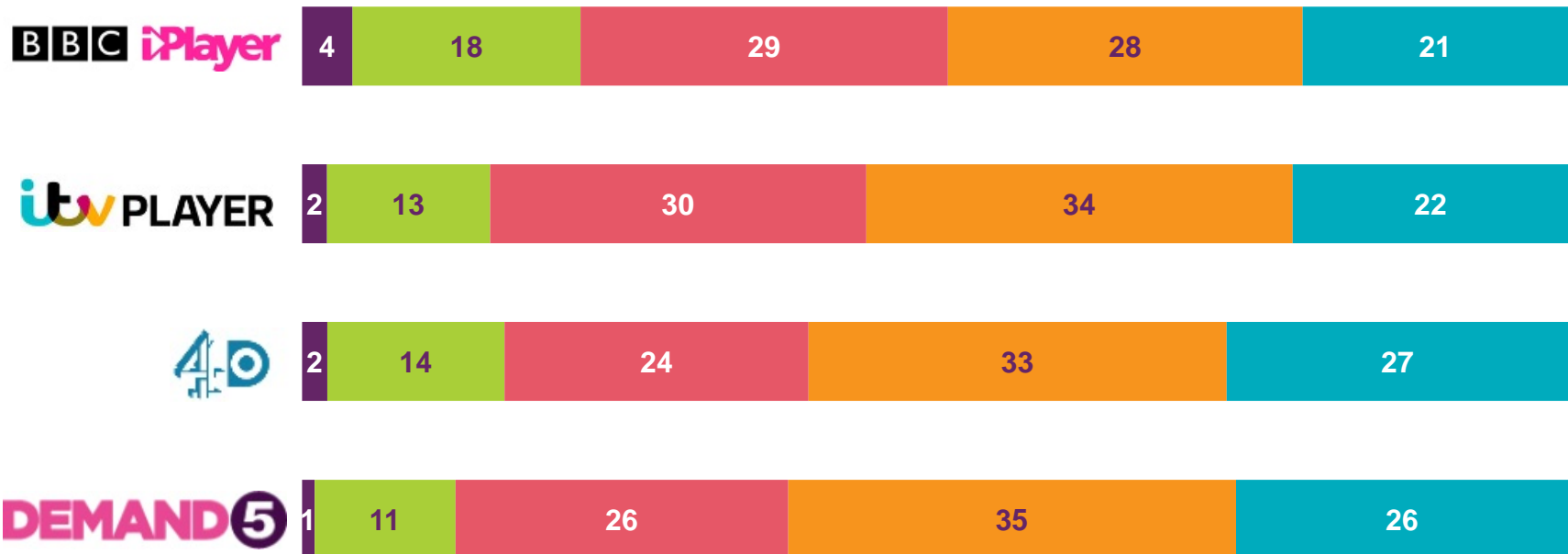
Q And for each one please could you tell me how often you typically watch each one. Base: All (2013=3028, 2014=3158)

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 2013=1307, 2014=1381, ITV Player 2014=765, 4OD 2013=495, 2014=502, Demand 5 2014=269)

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 (2014=3158)

Fig 48 Frequency of viewing on-demand services, among users of each service

■ Every day ■ Several times a week ■ At least once a week ■ At least once a mont ■ Less than once a month



Please could you tell me how often you typically watch each one.

Base: All using each catch-up service: BBC (1690), 4OD (696), ITV Player (985), Demand 5 (365)

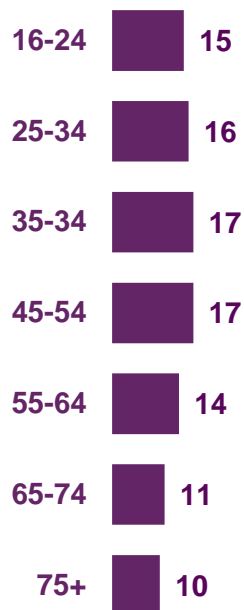
Demographics



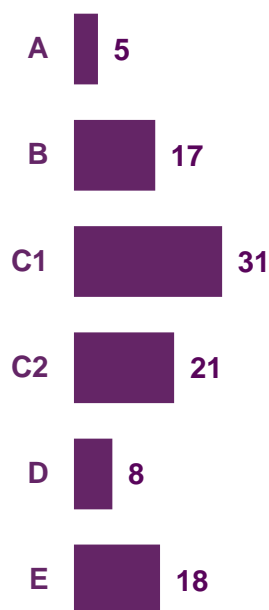
Gender



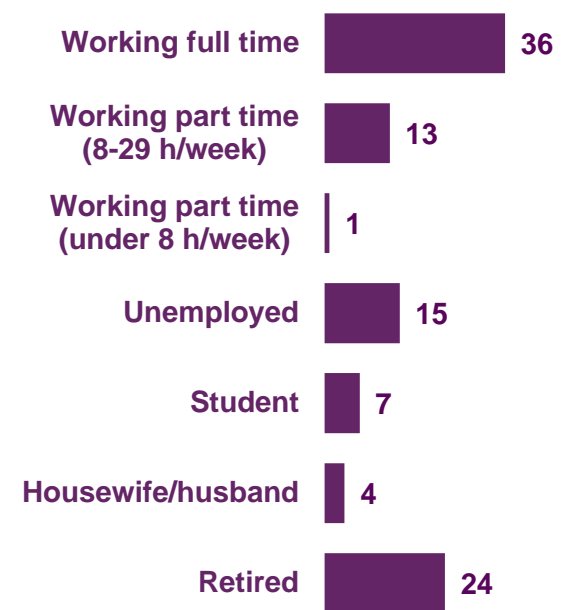
Age



Social Class



Working status

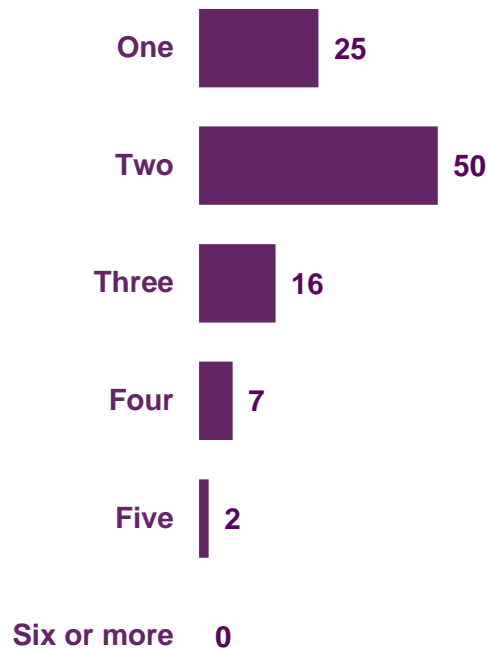






Household size and composition

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 (3158)



Limitations in daily activities or work



Q Which of these, if any, limit your daily activities or the work you can do?
 Base: All (3158)