Review of Local Media

Qualitative Findings

Research Document

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Introduction

1.1 Objectives

As part of Ofcom's overall review of local media provision, this deliberative qualitative research was required to provide evidence and insight on the sort of local media landscape that UK consumers and citizens want. This research focuses on local content users' views, as well as exploring 'citizen' responses to future scenarios. The specific objectives for this work are to explore and understand:

- Attitudes towards current local content and the role that local content plays in overall media consumption

- Views and preferences for local news content – including key drivers for those preferences

- Views and preferences for local non-news content – including key drivers for those preferences

- The effectiveness of different media in terms of delivering local content

- Views – both consumer and citizen – on what local content should be provided

- But also what local content would actually be consumed

- Responses to Ofcom's suggested approaches for intervention to stimulate the local media market

See Appendix A for details on methodology and sample.

Executive Summary

2.1   Introduction

This report contains the deliberative findings from a research study conducted by Synovate between April and May 2009 on behalf of Ofcom. The aim of this study was to inform Ofcom's review of local media.

2.2   Methodology and sample

Research was conducted using a deliberative workshop methodology:

- 8 x 3 hour workshops

- 16 – 18 participants per workshop

- Conducted in 8 locations across England, Wales, Scotland and Northern Ireland.

Workshops used a variety of techniques to stimulate and inform discussion:

- Presentations on current local media trends and future investment options

- Self completion exercises – ranking of importance and funding allocation.

The research sample was segmented into two groups:

- Core local media consumers (older)

- Lighter local media consumers and potential local new media consumers (younger)

2.3   Key findings

Local media plays both functional and emotional roles in peoples' lives with greater appetite for factual and investigative news than analysis and opinion

Local media plays two key roles in people's lives:

- Functional – telling them what is going on, where and when

- Emotional – things they need to know to feel like they belong to their local community.

Many use their local media mainly to find out about the people and places they know – the often trivial incidents that make up the ever day lives of their locality. For many, this is of more importance than following local politics or local council activity.

As a result, there is greater appetite for factual and investigative news than for analysis and opinion. This is strengthened by a general feeling that the high levels of interaction with local media (via phone-ins, letters pages and internet 'have your say' sections,) plus local word of mouth, provide a platform for consumers to form and share their own opinions.

For many local media forms part of the daily routine and choices are driven by the access method and content being consumed

Local media choices are driven by both *how* media is consumed and *what* is consumed. This is because behaviour around local media consumption is regular and habitual – many participants have routine, allotted slots for their preferred medium.

Key platform preferences are as follows:

- Regional TV is the main source of local news content for many. It is felt to give a sufficient level of coverage which can be absorbed with minimum effort.

Local press is particularly important amongst older participants, for whom it plays a nostalgic and ritual role. Readers appreciate the depth of coverage and the opportunity to consumer at their own pace.

Radio is regarded more as a source of information, music and entertainment, rather than local news content. Participants appreciate its easy access and ability to supply up to the minute news reportage and information.

Local websites are felt to provide convenience, choice and control over local content consumption and act as a one-stop shop for most types of local content. They are the natural way to access local information for many participants who already use the internet regularly in their daily lives.

Substitutability depends on method of access and depth of content

Local media choices are driven by both *how* media is consumed and *what* is consumed. This is because behaviour around local media consumption is regular and habitual – many participants have routine, allotted slots for their preferred medium.

Content and accessibility are closely interlinked and difficult to separate when considering the implications of substitution. Substitutes for a preferred medium cannot provide the same method of access and participants are clearly saddened by the prospect of losing their own favourite local media 'occasions.'

Beyond *how* the content is consumed, substitutability is judged in terms of depth of content, so that, when forced to consider substitution, participants say that TV and radio can to some extent replace each other, as can press and online, provided at least one of each category remains.

Choice is less of a concern where the BBC provides an acceptable alternative

Choice is less of a concern within TV and radio than within press as for many participants the BBC provides an acceptable alternative within TV and radio. Additionally news content is broadly similar across different local radio stations and programmes and so people do not feel that losing some stations would significantly change the overall content available. By contrast, people feel that there is more variation between news content in the press than on radio and TV.

Other concerns around lack of choice within press are caused by perceptions of press coverage being more anonymous than radio and TV. People feel 'safer' with TV and radio because content is conveyed to them via presenters – other human beings who they can relate to and trust. The printed page is felt to be less accountable.

Few respondents are concerned by single ownership within and across local media

Participants do not spontaneously mention media ownership as an issue although they are not surprised by media ownership within their local area. In many cases it is accepted as an inevitable trade-off against losing local media altogether.

Many people are not worried about cross media ownership, even when confronted with the scenario of ownership across all local radio, TV and press. A minority are instinctively concerned, without being certain of the potential implications – most of these feel that single ownership across all press and radio would not be acceptable, but can accept single ownership within press or radio individually. A few, usually those following local politics, are deeply concerned by media ownership at any level – either within or across media.

Cross platform ownership which maintains a choice of access methods and avoids monopolies within media is felt to provide a 'best of both worlds' potential solution.

From the citizen perspective, respondents' want to maintain accessibility for the majority

Participants were asked to consider nine different options for investment, and to allocate a hypothetical sum to each:

- Ensuring the continued provision of regional news

- Support for local newspapers

- Support the development of local community media

- Support local commercial radio

- Develop a network of local media websites with new video content

- Provide more areas with local TV

- Ensure rural parts of your area have access to local websites via fixed broadband

- Ensure your local area has access to DAB radio

- Ensure rural parts of your local areas have access to local content via mobile phones and mobile broadband

When considering the investment options from the consumer perspective, most participants are driven by their preferred method of access – the desire to maintain their own established local media occasion. The citizen viewpoint is driven by a desire to benefit the largest number of people and provide a range of access points to suit all. Consequently, the three traditional media – press, radio and TV receive considerable investment consistently across the sample.

The level of investment is guided by the needs of the medium people wish to support. For example, many respondents gave small, equal amounts to established media such as press and TV in order to preserve them whilst a few chose to invest much larger sums in 'start up' media, such as community media and local TV.

Universal broadband options received equal investment with local media options from the citizen viewpoint, suggesting they are felt to be of equal importance to sustaining local media.

Section 3

Local media usage and attitudes

3.1   Introduction

This section explores how local media fits into the lives of participants in terms of how they think, feel and use different types of local media and specific platforms.

Specifically, it discusses:

- How participants understand their own local media landscape

- Influences on local media consumption

- The role of local media in participants' lives

- Attitudes to local news content

- Current usage and attitudes towards types of local media and specific platforms

- Perceived changes across local media

- Willingness to pay for local media

3.2   Understanding 'local'

Participants appear to interpret local, regional and national boundaries in different ways. For example, some participants define local and regional divides in terms of geographic boundaries and population. Other participants, particularly those in Wales, Scotland and Northern Ireland, may regard regional boundaries as 'national' and therefore may perceive regional press titles as national.

> *"Northern Ireland, as a region it will cover those [local] stories."* (Belfast)

"The trouble is it's not really local it's national ..... to Wales and I think that's what BBC forgets, it's a different country, so BBC Wales is not local it's national, and it's covering is huge… whereas in England you'll get BBC which is London orientated and then you also get the local news as well whereas we have to make do with the whole of Wales." (Cardiff)

Participants generally say their local area comprises of their immediate neighbourhood and community and their town or city.

3.3   Influences on local media consumption

Local media consumption is influenced by a wide range of factors, therefore platform choice is highly idiosyncratic and is ultimately driven by personal preference. Participants raise the following key factors which influence their platform choice:

- Range of local media sources available in a participant's area

- Perceived level of effort to consume information and news

- The depth of local content offered

- Perceived quality

- Habitual or nostalgic use of a platform

These factors are discussed in relation to specific platform preference in section 3.6 'Current usage and attitudes to specific local media platforms'.

3.4   Role of local media in participants' lives

The research suggests that local media can play both a functional or emotional role in participant's lives. The extent to which participants interact with local media in a functional or emotional way is affected by life-stage and the participants' level of involvement or desire to connect with their local area.

<u>Functional role</u>

Participants who consume local media in a predominantly functional way talk about using local media for practical, information based content which helps them live their day-to-day lives in their local area. For example these participants talk about turning to their local media to seek information about job listings, entertainment, local services through classified advertising, weather reports and traffic updates.

> *"It's quite important but I think some of the main reasons why you use local media is only relevant to that period in time, like people that are unemployed, they will do it more because there's jobs in it but otherwise they might not read it because they're not worried about the news or anything, it's more of a necessity."* (Mansfield)

In terms of news content, more functionally driven participants say they are mainly interested in keeping up to date with what is going on in their local area, particularly information and local news events that impact on their daily life, for example event information, hospital closures, road closures etc.

In general these consumers tend to actively search for specific information as they require it, for example, looking up information about a specific event, turning straight to the classified section of a local newspaper to look for jobs, or entering specific search terms on a search engine like 'Google' to find exactly what they are looking for. In terms of news consumption, rather than consuming local news sources in any real depth, these participants seem to be satisfied with scanning major headlines in local newspapers, listening to brief radio news bulletins, catching stories of the day through regional TV news, or scanning headlines on local news websites.

These participants do not seem to actively seek a deeper level of local content in their area, which some participants attribute to their busy working, family or social lives. Some participants also say they do not have a strong connection to their local area as they have not have lived in their local area for a long time, or commute between two areas. This may help to explain why these participants say they lack the time or desire to seek further information or news content in their local area. Therefore, these participants seem to prefer

platforms that enable convenient and targeted access to local information. For some, the internet is an ideal platform that meets all of these needs.

<u>Emotional role</u>

Some participants, typically those in the family life stage or in the older age group suggest that local media plays a more emotional role in their life, helping them feel a sense of belonging to the local area. They still use local media for functional reasons, but their reasons for consuming local media extend beyond simply wanting to know local information to wanting to engage with the people and places and issues that affect their local area.

These participants suggest local media plays a significant role in building social connectedness and a common identity within a local area.

> *I just like to be nosy to be honest with you. I am just like… I remember them because I used to live in Hayes. There was a story in there this week and I was like oh my God it is CRB… [he's] supposed to be in prison and he is one of my customers and … I am just being nosy."*

Participants say that local media showcases and celebrates local events, landmarks and local 'personalities', which for many seems to contribute to a broader sense of local identity. Some participants also talk about how seeing, hearing or reading about people and places that they know provides a sense of belonging to a community, and pride about where they live. Examples include parents and grandparents seeing photographs of their children participating in local events in their local newspaper, reading obituaries in the local newspaper of people in the community who have passed away and listening to or watching local presenters on local radio or television programmes.

These participants talk about actively seeking news content in more detail, especially those who use local media to pursue specialist local interests such as sports, politics, or to get involved in particular local issues, for example campaigns to preserve local landmarks or stop upcoming developments etc. Many of these participants say local newsworthy incidents not only provide useful topical information, but also provide common talking points between local residents.

> *"Where I'm living, they are looking to put extra charges on the railway land so everyone and the residents are all getting together and doing a bit of a newsletter and keeping each other up to date and meeting in the community hall and things like that."* (Cardiff)

These more emotionally driven participants express strong loyalty to specific platforms and titles, driven by nostalgia, habit or emotional bonds that have formed over a long period time (for example reading a specific local newspaper paper every Sunday, watching the regional TV news bulletin before dinner, enjoying a particular radio host or personality on a local radio station etc.).

3.5 Attitudes to local news content

Participants suggest a greater appetite for factual and investigative news, (e.g. information and reported news), rather than analysis and opinion, (e.g. journalistic commentary and editorials on specific local news issues).

> *"I didn't really think that reporters give their opinion, aren't they just supposed to report and then we make our opinions?"* (Belfast)

Many participants perceive little need for opinion and analysis in local news content, as they say issues typically reported in local media are relatively straightforward and easy to understand, therefore not requiring any additional interpretation.

Only a few participants (typically those who are relatively more engaged with local news issues) mention the need for analysis and opinion, for example in relation to local politics. However, even these participants raise doubts that local media journalists would be able to provide the same quality of analysis in opinion found in national media.

There is some sense that this perceived lack of need for analysis and opinion on local issues may drive participants' relatively low expectations of local news content, especially when compared with media at the national level.

Some participants also feel that analysis and opinion is now less necessary because there are so many opportunities for individuals to contribute their own points of view, for example via phone-ins, blogs and letters to the editor.

> *"They [BBC Radio Wales] get people phoning in from all over Wales saying what they think about what has happened."* (Cardiff)

3.6 Current usage and attitudes to specific local media platforms

Regional Television news

Many participants regard regional news bulletins on television as their main source of local news content, particularly for older participants who say watching local news bulletins on television is an established part of their daily routine. In contrast, some participants with younger children say that they do not have time to watch local news bulletins as they are busy getting children ready or preparing meals – these participants therefore turn to other, more convenient platforms which allow them to consume local content at their own convenience, for example local newspapers or websites. Some participants say they tend not to make deliberate efforts to watch local TV news but some say they will watch it someone else in their household already has it on, it comes on immediately after something else they were watching, or if the news comes on as soon as they turn on the television.

> *"I am the mother of a 1 year old, so my life is very routine, out in the morning, and home for the evening bath time, so by the time I am getting to bed it's the internet for me, so I will be lucky to get 30 minutes during the day watching TV."* (Belfast)

Participants identify the following key benefits for this platform:

- Easy to digest - helps you feel informed about local news issues, without having to exert any real effort to consume

- Regional TV news provides a good level of coverage on major issues of the day, i.e. it provides more than just a headline

Differences between BBC and ITV news are largely driven by personal preference in relation to tone, time slot, and having an established relationship with a specific channel.

Some participants say they prefer the friendlier and inclusive tone of ITV to the BBC, which for some makes the news items seem 'closer to home'. Other participants say they prefer the professional tone and production quality of the BBC. However, many participants comment that in recent years both channels have expanded their areas of news coverage, which for some has meant a shift to a more regional news focus, and therefore some loss of specific local content.

> *"I would rather watch ITV, I find the BBC a bit too political."* (Ruislip)

A few older participants say their preference for BBC has little to do with actual content but is simply as a result of having a more established relationship with the BBC than ITV based on habit and tradition.

Local press

Many older participants say local press is a traditional platform with which they have a habitual and even nostalgic relationship. Many participants talk about how reading their local newspaper, for example on a Sunday with a cup of tea, is an established part of their lifestyle, and some regard the ritual of reading the local paper as an important solitary leisure or relaxation activity

Where there is a breadth of choice, participants express strong loyalty towards preferred titles, based on perceptions of quality and specific content needs, for example local event guides and sports news. Many of these participants describe particular titles as icons of their local identity and state a real need for their preservation. This is noticeably more common in regions where there are local press titles which are considered to be of above average quality – participants in Norwich (Eastern Daily Press) and Mansfield (Mansfield Chad) seemed particularly attached to their core local title.

> *"I think it's better than most national papers, papers are full of lies most of the time but you believe the Chad."* (Mansfield)

Participants identify the following key benefits for this platform:

- Provides detailed coverage of issues in the news

- Covers both local news and local information (e.g. job and event listings)

- Able to consume at own pace, often regarded as a relaxing leisure activity

- Often regarded as an icon of community identity

Local radio

Many consumers, especially those from the younger age groups, regard radio more as a source of information, music and entertainment, rather than local news content. While some participants switch between local and national radio, others are local radio loyalists, particularly where they have a developed an affection for a particular local radio personality.

Participants identify the following key benefits for this platform:

- Easy access - information and news can be passively consumed with little effort whilst 'on the move' or when played in the background.

- Important source of real time information, especially traffic updates, event information and community notices (e.g. school closures).

- In relation to news content, participants say radio communicates important 'need to know' daily headlines, provides breaking news and bulletins are repeated hourly if missed.

Participants generally perceive little difference between local news content between BBC and local commercial radio. As with radio, preferences are highly individual and seem to be driven by differences in depth of local content, tone and inclusion, briefly summarised below:

- Many participants say the BBC has a more professional and serious tone, although some say they prefer local commercial radio because it has a friendlier, informal tone.

- Some participants prefer local commercial radio to the BBC, as the more personal and informal tone helps them to feel closer and more connected to the news content they are listening to

- Some dislike advertising on local commercial radio, while others find it a useful way to keep informed about local services and events

- Some participants feel local commercial radio is more interactive and encourages community participation through phone-in shows

Local websites

Participants in the research report a range of different behaviours and attitudes around using websites to consume local content.

Some participants explain that websites are a natural way to access all types on information including both local information and news content. These participants say they prefer online consumption of local content as it enables convenient access and more tailored and targeted local content consumption.

> "*You don't have to sift through the paper or wait for the news, you can just find it straight away, you just type in what headline it is [using websites.]*" (Mansfield)

> "*Local Government website is handy for like Easter and bank holidays… to find out when they are actually coming to get the rubbish.*" (Ruislip)

In contrast, other participants are simply less engaged with the internet in general, due to either a lack of interest or knowledge of how to use the internet   These participants say if they do use the internet at all, it is restricted to searching for specific local information on a small range of local websites, for example using a local newspaper website to find out the details of a particular upcoming event, or a local council website to find out what days the recycling will be collected.

Participants identify the following key benefits for this platform:

- Provides choice and control over local content consumption

- A one-stop-shop for most types of local content

- Readily accessible source, able to access information on demand (compared to broadcast media where information can be missed)

Overall, participants appear to have limited awareness of the range of local information available online outside of:

- National newspaper or news media websites, e.g. Sky news, which allows consumer to search for content at the local level

- Local newspaper websites, e.g. Eastern Daily Press in Norwich

- Event guides on local newspaper websites, e.g. 'What's on' webpage on the Surrey Advertiser Online

- Entertainment venue websites, e.g. local theatres or booking offices.

- Local council websites

3.7   Current usage and attitudes to other types of local media

Community media

Participants typically describe community media in terms of home delivered leaflets and newsletters providing information on local events, services and meetings in their neighbourhood or immediate local area. Respondents tend not to distinguish between community media and council produced media, as many respondents brought council newsletters to the research as examples of community media. Some respondents have seen local information at libraries and on community notice boards and (when provided with a definition in the workshop) feel that this also contributes to community media.

> *"The best place for local information is if you have got a library. I mean there is a library in the next village and they have a lot of stuff in there."* (Norwich)

In general participants do not talk about community media as a distinct platform, or major source of local information, suggesting that it is a niche platform consumed by a relatively small audience. Many participants say they pay little attention to community media given its inconsistent distribution and low production quality.

> *"[Community media] is sort of local things that I don't have time to be involved in anyway, so it just goes in the bin."* (Norwich)

In contrast, some participants, especially those who have strong links to their community, value community media because it provides information about events, activities and services available in their immediate neighbourhood and community. Community media seems to best serve those with a specific area of interest, for example:

- Stay-at-home mums with young children say that community leaflets and newsletters inform them of parent networks and recreational opportunities for their children that they otherwise would not have been aware of.

  "We've just had a baby, the wife and I, so maybe when he starts going to school it will be of more interest to us." (Belfast)

- Older participants who have lived in their local area for a long time say leaflets or newsletters produced by local interest groups provide opportunities to get involved and support local causes.

- Participants who are frequent church goers say they regularly read parish newsletters to feel connected to their parish stay abreast of local church activities.

- Community media can play a role for participants from a BME background. They feel that BME community media such as newsletters and radio programmes help to support their cultural identity within their communities, through communicating in native languages and providing a forum to discuss issues specifically relating to their cultural background.

  "They also have discussions on the radio and they have people with different languages as well, they cover the Hindi and Punjabi languages, there are people who don't understand English so it is mainly for them." (Glasgow)

Council publications and reported council information

Overall, participants in the research express little interest in consuming local media about council politics and council activity. Many participants say they turn to council publications or local council websites for information about specific services and events and that they rarely seek further news and information about council activities and decision making.

Some participants mention that while they are interested in finding out about key council outcomes or decisions, they are typically happy to consume this news via local council publications and other traditional local media news sources. This suggests that for many participants, there is a reasonable level of trust in council publications, and that council bias is not a top of mind concern.

Few participants talk about actively seeking and consuming news and information about the underlying council decision making processes. Again, many of these consumers are content with the level and accuracy of information available through council publications and local press. Few participants, only those who are deeply interested in council activities, turn to multiple media sources to counter council bias in council publications.

3.8 Willingness to pay for local media

Many participants say they are accustomed to receiving the majority of local media free of charge, therefore express limited willingness to pay for local media beyond their regular purchase of a preferred or valued local press title.

> *"I think the journalism type is not as good as the national, if that makes any sense, in the way it's written, whether it be on the freebie magazine.. but then again, you're not paying for something so it's more likely someone who's trying to do some free*

journalistic role with a view to getting onto a more established newspaper or something." (Guildford)

Some participants say they are reluctant to pay for their local or regional newspaper where they perceive a decline in quality, for example increased advertising. Other participants, especially those that are lighter consumers of local media, say they would rarely pay for a local or regional newspaper and actually only read one of these sources second hand, when they do not have to buy it themselves - for example, when they can pick it up in a public place or by reading a family member's paper.

Participants who typically use the internet as their major source of local content express resistance to paying for local media, given their awareness and usage of local content available on line free of charge.

> *"You can actually get it online, most of the content, 'cause I looked the other day for the Guildford festival of the line up, who was playing and it's pretty much what you'd buy and you can get it free online."* (Guildford)

3.9   Changes to the local media landscape

Some participants say they are aware of recent changes to the local media landscape, which some say can be attributed to changes in ownership. Examples include:

- Some titles covering a wider area resulting in some loss of localised content

- Some titles disappearing altogether

- Perception of a loss in news content e.g. more advertising, thinner papers

- Prices of newspapers have risen despite some reduction in content depth

- Changing of radio station names possibly as a result of changes in ownership (particularly Manchester and Norwich)

Despite some awareness of these, few participants say this has resulted in significant changes to their actual behaviour, suggesting a gradual acceptance of recent changes to the local media landscape.

Substitution and Choice

4.1 Introduction

Discussion on the substitution of local media platforms took place following a brief presentation on local media trends including information on the decline in consumption and issues facing local media. Participants were asked to complete two exercises in order to elicit views on personal importance of various media platforms and how they could be substituted if they ceased to exist. The first exercise involved participants scoring (on paper) each media platform out of ten on how important it was to them in delivering local news and record why. They also completed a deprivation exercise as a group where they had to decide which media platforms took priority for local news and explain their decision. They were asked to imagine they were in a hot air balloon with all local media platforms and that they had to be jettisoned one by one to prevent it from sinking.

This section explores how important each local media platform is to participants, how they could be substituted and how they feel about losing each platform.

The following section discusses:

- Response to media trends presentation

- Factors that influence the importance of media platform

- Hierarchy of importance of media platforms

- Substitution within the four 'key' media platforms

- Substitution potential and what factors would be lost

- Choice of titles, channels, stations and providers

4.2 Response to *Media Trends* presentation

The main points covered in the presentation were:

- Changes in local media consumption and usage

  o Consumption of regional TV and local radio is falling

  o More significant decline in circulation of local and regional newspapers

- Changes in local media consumption and usage

  o Decline in local businesses advertising locally

- Advertising revenues have shifted away from traditional to online media

- Explanation of the link between falling advertising revenues and the survival of local media platforms

- Opportunities for the future of local media including local TV channels and online

  o Limitations of these platforms

Many participants have not consciously considered these issues before and do not have an existing understanding of the relevant issues (i.e. falling advertising revenues etc.). For many this is the first time they have considered these issues at all. However, participants are not altogether surprised by the information. As discussed previously some said they had noticed moves towards regional content that covers wider areas on TV news. Additionally participants accept that online sources are becoming more and more prevalent. A more general feeling (particularly from older respondents) that the feeling of community that used to exist in their local area is disappearing further underpins the lack of surprise expressed.

There was a general feeling that it would be a shame if local media was 'lost' even amongst those less engaged in local media. The emotional role that is fulfilled by local media for many of the participants seemed to be feeding in to this sense of loss.

The focus in the presentation of the internet providing opportunity to reach new audiences for local media often created debate. Participants that were not frequent internet users (particularly those that were not using the internet to access local information) say that local information shifting from traditional sources (e.g. press, radio, TV) concerned them. Some other participants who considered fairness of access expressed a similar view on behalf of older and less internet 'savvy' people. They expressed concern over local media content moving from accessible formats to less inclusive ones where some individuals would be or feel excluded.

> *"The local Gazette - it's your weekly information of your area from the paper, because not all people use the internet, like you, didn't you say you don't use a computer?"* (Ruislip)

> *"It would be very difficult for older people because they find it hard to adapt and change, it's hard for us to learn the internet, it's hard for us to find it and they are making it freely available, there are courses and everything but it's still so difficult now and it's hard to understand – I'm on a computer course now and I'm finding it so hard – yeah everything has changed so much."* (Mansfield)

It is important to note that considering the decline of local media (as a result of the presentation) may have influenced participants' responses when considering the importance of the various local media platforms and how they could be substituted. We believe that the thought of losing more traditional platforms may have led some respondents to be quite 'protective' in their responses.

4.3   Factors that influence the importance of media platform

When participants discuss reasons for placing importance on local media formats they discuss content types that are important to them, but also how information is accessed. We believe that how content is accessed plays a key role in how important the platform is to them and consequently how comfortable they are to substitute one platform for another. Participants often place importance on platforms which have an established, habitual place or moment in their local media consumption and wider lives. Therefore preference is personal and idiosyncratic and can be based upon a number of factors not restricted to content.
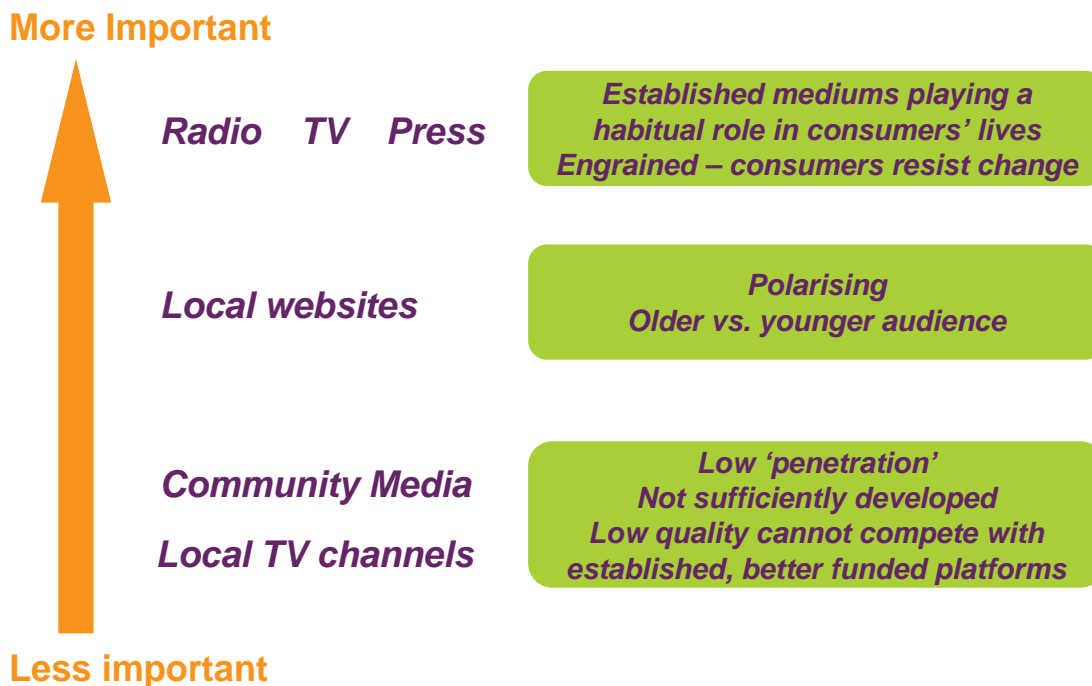
Whilst participants may be able to substitute platforms on grounds of content, method of access is less easy or in some cases not possible to substitute. As a result, participants find it difficult to easily identify appropriate substitutes and often dislike the idea of losing any one platform when forced to do so.

There are opportunities to ensure that access to local media content survives through less traditional platforms (namely the internet and dedicated local television channels). However, as participants place significant importance on how content is accessed, ensuring the survival of all desired content may not be enough. Many participants feel that choice of media platforms is important to ensure that all individuals have a method of access that suits them.

4.4   Hierarchy of importance of media platforms

Participants completed an individual exercise indicating which platforms were the most important to them and why by providing a score and explanation for each platform type. Importance is often driven by participants' personal preference and current consumption.

Figure 1: Hierarchy of importance of media platforms

More Important

Radio   TV   Press
Established mediums playing a habitual role in consumers' lives
Engrained – consumers resist change

Local websites
Polarising
Older vs. younger audience

Community Media
Local TV channels
Low 'penetration'
Not sufficiently developed
Low quality cannot compete with established, better funded platforms

Less important

Base: Qualitative data

Radio, TV and Press

Most participants say they consume local information via a mix of radio, TV and press. Whilst local news can be consumed via all three platforms there are other local content types that participants access through one particular platform. For example local radio stations provide regular travel updates and local press features jobs and obituaries.

In addition to fulfilling content needs, participants indicate that these established, traditional platforms play a habitual role in their lives. Many participants say local/regional TV news programmes are part of their daily routine. Some participants discuss the role that local radio channels have in their daily routine, for example in the car or over breakfast at the start of the day.

We believe that the habitual role that traditional platforms can play means participants place great importance on them and resist the idea of change, particularly those who are older. Some younger participants also value consuming local information via traditional platforms both because of the role they play in their lives as well as a general sense that it would be a shame to lose these local platforms.

Local Websites

Local websites seem to polarise opinion. Whilst care should be taken as participants were recruited in part for their internet usership, accessing local information via the internet is very important for some participants and not at all for others. In general this depends upon current behaviour although some less engaged with the internet also say that that the internet is an important platform for the future.

Community Media and Local TV

Community media and local TV (i.e. dedicated local channel) are deemed the least important media platforms by most participants. Both are being consumed by fewer participants than other media platforms. In some cases participants choose not to engage with these platforms whilst other participants are not aware or do not have access to them.

Those that have had experience of them feel that community media and local TV are of quite low production quality. Additionally those who have not experienced them expected that this would be the case. However the few participants that are using community media on a frequent basis do not mind the lower quality format.

Few participants say they use community media. Those that do, say that it provides them with useful and interesting information about their immediate local area. However, most participants do not consume community media on a regular basis. Some report that they have received it through their door, but were not particularly interested in it. Some participants say the poor production quality is not enticing and that the content is not interesting to them. Many are also put off by the niche content which lacks personal relevance. Participants feel that content on local TV channels is also quite specific to certain groups and likely to have a niche appeal, for example programmes on local schools.
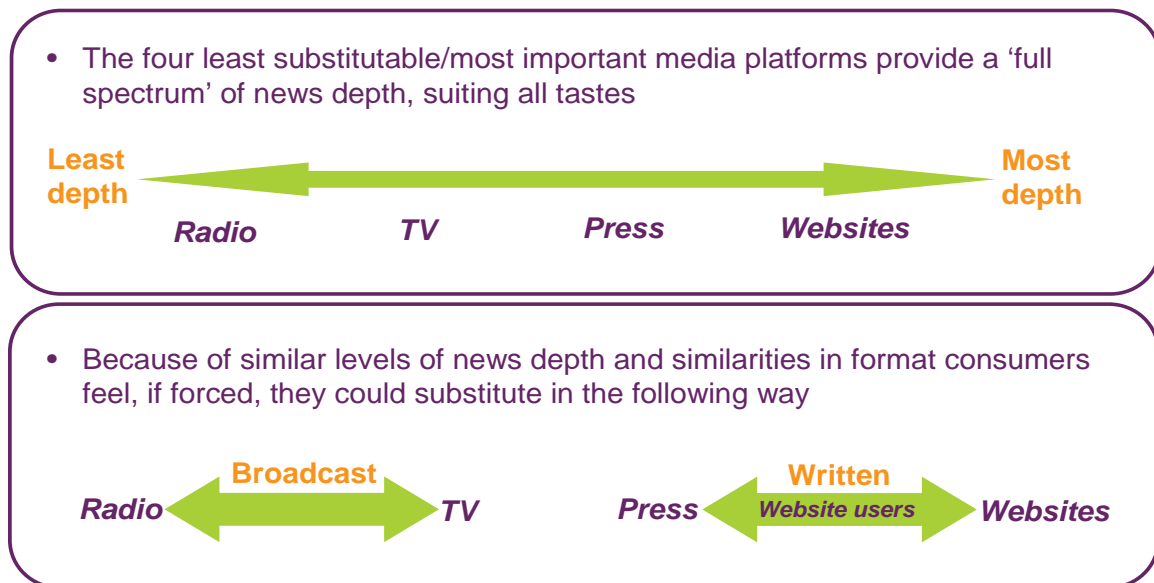
> "*The thing is I used to watch it (Channel M) a little bit but it's pretty samey. But I'm in a band and we did this competition and if we'd have won we would've been put on*

Channel M so I was watching it at that time and it kind of does good things for bands and stuff." (Manchester)

4.5   Substitution within the four most important media platforms

When forced to substitute a key consideration is depth and detail of local news, participants spontaneously talk about the amount of depth and detail they want and which platforms provide them. A 'full spectrum' of news depth is available from the four media platforms deemed most important for delivering local news (i.e. radio, TV, press and local websites). Therefore some substitutions could be made on the basis on news depth with participants often choosing to keep one full content medium (i.e. press or websites) and one more brief content medium (i.e. TV or radio).

Figure 2: Substitution between key media platforms

- The four least substitutable/most important media platforms provide a 'full spectrum' of news depth, suiting all tastes

Least depth ←→ *Radio   TV   Press   Websites* →← **Most depth**

- Because of similar levels of news depth and similarities in format consumers feel, if forced, they could substitute in the following way

Broadcast
Radio ←→ *TV*   **Written** *Website users*   *Press* ←→ *Websites*

Base: Qualitative data

Source: Ofcom Review of Local Media conducted by Synovate in May 2009.

Radio and TV

Participants say that local news bulletins on the radio are relatively brief. Some participants say they provide just enough information to feel they are keeping informed on local news. Participants that prefer this type of delivery say they like the 'bullet' headline style. Regional TV news provides more depth. Some participants say they like to have more information on local news and receiving a half hour daily bulletin covering the most important local news. Both radio and TV are broadcast formats where content is provided and delivered to participants making consumption simple. The similar level of depth they provide and the similar nature in which they are consumed mean that, if forced, participants could substitute one for another.

Local press and websites provide a greater level of depth of local news for consumers that want to know more than a minimum. These two platforms provide more news stories and often more detail. A few participants say that if a particular story interests them they will search for more information on the internet.

> *"I find it easier to go home and if there is something I've heard slightly on the radio or just caught someone mentioning I find it easier to type in a few words and have that exact thing I want there in front of me, instead of having to trawl through to find it."* (Mansfield)

We believe that similarities in depth and ability to choose which items they want to consume means that local press and local websites can provide a substitute for each other. However as discussed previously the internet is not as accessible as more traditional platforms and those participants not using the internet would not choose to substitute local press for local websites.

4.6   Substitution potential and factors that would be lost

This section discusses all local media platforms and how they could be substituted by one or more other media platforms. Whilst participants discuss possible substitutions it is important to note that they do not actually want to substitute their preferred platforms. Options for substitution are offered by most participants only when they are forced to consider an alternative.

Local radio

Participants feel that regional TV can provide a substitute for local radio due to the depth of coverage of local news and that it is a broadcast format. In addition, both radio and regional TV are accessible platforms for most consumers.

When forced to consider what would be lost if local radio ceased to exist participants discuss a number of factors:

- The mobile nature of the platform. Many participants say they access radio on the move, relying on it to provide them with travel updates whilst driving. They also say they like to hear news updates whilst travelling.

- Real time information and immediacy. Participants say that radio is able to provide them with current news and other up to date information, for example traffic updates. They feel that most other media do not have the potential to provide completely up to date content.

"It's not easy to replace the things like traffic delays or local weather. When you want instantaneous news then you can't beat the radio broadcasts." (Ruislip)

- Local personalities. Participants say that they enjoy hearing local personalities on the radio. They think that radio provides an opportunity for local accents and

personalities to thrive and reach the local area. Some participants talk about being disappointed when one of their 'iconic' local radio personalities moves to a national station.

- Opportunity to participate via phone-ins. Some participants say they value the opportunity to call in and comment. Even some of those that had not done so feel it is a positive aspect of local radio stations.

Regional TV

Participants say that if regional TV was lost, existing content such as news, sport and weather could be accessed across a number of other platforms. Participants say that a combination of local radio, press and/or websites would be able to provide them with this content. As previously discussed, the similar broadcast format and level of depth leads radio to be a suitable substitute for these reasons. However if regional TV news disappeared, participants often said they would miss other factors (not related to content) the most:

- Easy and widespread access. Many participants say that regional TV news is very accessible. It is broadcast on terrestrial channels so is available to any person owning a television. Most participants think that this is an important consideration and that all citizens are entitled to be able to access local news in this way.

- Habitual moment. Many participants, particularly older participants, say that watching the evening regional news is an established part of their daily routine. It seems that there is a nostalgic element attached. Many tend to have a clear preference for either ITV or BBC news and know which time their preference is broadcast.

Participants did not say that losing regional TV news would lead to any significant loss of local information (particularly on the immediate local area) as it rarely includes information on the immediate local area. However some participants say that regional news content can provide a context for what happens at a more local level. Additionally, participants did not think that regional TV news was considered a local 'institution', as local press titles may be. If regional TV news ceased to exist loss is more limited to loss of convenience and habit than content or sense of localness.

Local & regional press

Participants say that much of the content found in local and regional press titles is also provided by local websites or community media. As previously discussed, local websites provide a similar level of depth as press in a similar format (i.e. the written word) where consumers can choose which content they want to consume. However it is important to note that when participants consider substituting local websites for local press it is sometimes local press websites that they are referring to (these would also cease to exist if local press titles did). Community media could provide a suitable substitute if it is able to provide the same quality and content as local press currently supplies.

If local and regional press titles ceased to exist factors pertaining to content as well as other issues would be lost:

i)   Particular content. Local and regional press titles provide content that participants say are not featured elsewhere. For example, many older participants say they regularly read the obituaries in the local press and would not be able to access them through any other platform. Many participants browse the job section of the local/regional press whether looking for a job or to keep up with the local employment situation. It was felt that this was a key platform for accessing this content type.

> *"Yes the Chad is good for other things apart from events. Like the obituaries - we all read that."* (Mansfield)

> *"The Anderson News is the only Irish newspaper that does planning permission… they advertise all the planning permission.*" (Belfast)

- Easy access. Newspapers are accessible to all. Whilst some participants regularly buy a local/regional newspaper (usually older participants) many others said they consume them free of charge by finding them in local establishments.

- Opportunity to write-in. As with local radio many participants said they appreciated the opportunity to participate by writing to the paper to comment or complain about local issues. Again those that had not done so perceived it to be a good thing that they could if they wished.

- A sense of local-ness. Participants say they really appreciate being able to see and read about people and places they know. In addition many local papers have been in production for a long time and have a sense of nostalgia attached to them. Some local papers seem to have an iconic status attached to them by participants, providing a real symbol of local identity.

> *"Local newspapers are important, invaluable. What it does is provide community spirit. It makes people aware of what's there and about."* (Ruislip)

> *"It's the most accessible for everybody. Keeps the community spirit together. You haven't got to lug around a PC or laptop to get the news."* (Ruislip)

Local websites

In terms of content local websites provide a variety of different types of local information, for example local news, weather and council information. In order to provide access to this variety of information participants say that local websites as a whole could only be truly substituted by a number of other platforms. However there was some content as well as other factors that would be lost if local websites ceased to exist:

- Access to council service information. Many participants say they use the internet to find information from their local council, for example on bin collection and recycling. The internet enables councils to provide consumers with a 'one stop shop' to find all relevant information. Some participants say that before the internet there was no single place to find this information when they needed it. Instead they may have had to make a phone call to attempt to find out.

- Easy access. For those using the internet access to local websites has become easy. Participants say they can access the internet at home and/or at work easily.

Consumers are able to decide when they want to access information and for how long rather than having a time or duration dictated to them.

"If I have been out all day and not listening to the radio I would stick on the local iplayer. And then you can call up any programme that you have missed during the day and listen to it, so you can listen to it at 10 o clock at night if you wish, which I think is great." (Belfast)

- Ability to search for any information. Participants say that they are able to search for any information they want to find. No other platform allows consumers to choose to access the content they want.

We believe that losing local websites would be a functional rather than emotional loss to participants. The instant access nature and opportunity to choose content cannot be substituted by any other local media platform.

Community Media

Whilst many participants say they are not consuming community media and do not feel it needs a substitute, there are a few participants that do engage with it. Given the specific localised content that community media provides it could only be substituted by media platforms restricted to smaller areas, for example local papers and local TV channel. Some participants feel that the type of content featured in community media could also be shared via word of mouth (for example from others in a BME community or information on children's initiatives from grandchildren). In this case word of mouth could be seen as a substitute for community media.

If community media disappeared factors that would be lost are:

- Information on very localised events. It is unlikely that other media platforms would cover all the specific events that community media promotes.

- Information on specialised interests, for example on children's activities and church issues.

  "I gave it a high score for importance because it's information about things happening. Gardens and things like that so you can get involved." (Mansfield)

- Further weakening of a sense of community. Many participants, particularly older participants, say that the sense of community that used to exist is dwindling. Community media, by nature, shares news within the community and it was felt that losing it would be a further loss to the sense of community that some participants really value.

- Easy access. Most participants that engage with community media say that it is delivered to their door. Many of these participants say that they would not know where to access this information if it were not delivered to them.

  "Well it's not readily available and you've got to seek it out. You have to have the time and inclination to do it" (Mansfield)

Local TV

Most participants that lived in or around a city with a local TV channel were not aware of it or did not watch it. As a result they say it does not need to be replaced.

Some participants say that if local channels ceased to exist it would be a shame, but it is possible that this is more of an idealistic view rather than being one driven by a loss to them personally. Reasons they give for this opinion are the loss of opportunity for home grown talent to 'cut their teeth' and the opportunity for them personally to get involved.

4.7   Choice of titles, channels, stations and providers

To elicit attitudes towards choice participants were asked how they would feel about local news provision if titles dwindled until there was only one title per media platform (for radio, TV and press). For both radio and TV they were asked to assume that the last option would be the existing title provided by the BBC.

When considering choice, participants' attitudes are largely based upon content.

TV

Many participants are disappointed at the thought that ITV news may no longer exist as they prefer the friendlier tone of ITV programming. Many also refer to BBC and ITV regional news programmes being broadcast at different times and like that there is a choice of times to watch a regional news programme.

However if forced to consider a scenario where only BBC local news existed there are not overwhelming concerns in terms of content. Participants say that the BBC could provide an adequate service. Even participants who prefer ITV news say that news content is largely the same across both channels.

> *"ITV was always on before BBC anyway so ITV has put the news on first and then you are getting the same on BBC, you could do away with one."* (Belfast)

> *"If we were just left with BBC East Midlands News, I'd be happy. It would be alright."* (Mansfield)

There was limited concern over bias. Many participants perceive the BBC as a trustworthy source for local news. However there is some concern that without competition the BBC local news may become less local and cover even wider regions.

Radio

In terms of delivering local news choice is less important for radio than TV. News bulletins are generally very short with little perceived opportunity for bias. Participants say that most radio stations broadcast news on the hour (and some on the half hour) so choice of times is not an issue as it is with regional TV.

Participants say that there are other aspects of local radio that make choice important. They say that particular presenters and music selections are reasons for their choice of radio station.

If forced to consider a scenario where only BBC radio existed in terms of local news again it is not a major issue. This is for similar reasons as above, i.e. the BBC is a trustworthy source and content is often quite similar.

Press

Participants say that it is more important to have a choice of titles when considering press. Participants tend to have an affiliation with individual press titles and spread their individual readership across a small repertoire of their personal favourites. They are keen to preserve this level of choice. However, retaining a choice of providers is less important for some (for whom bias is not a key concern).

There is concern over bias amongst a few participants – many of whom belong to the 'Actively Concerned' attitudinal group discussed below. The BBC, which many participants say they trust, has no presence in this platform. There is no known, trusted provider to provide a 'safety net'. We believe that this may also be due to the production of press being much less 'visible' than production of radio and TV. A few of these participants perceive there is greater potential for bias that would be more obvious on 'live' broadcast formats. Press titles seem less accountable and more anonymous than TV and radio. Few participants know who actually owns their local press titles or what their perspective is. With radio and TV they are able to see and/or hear the presenters and this makes these mediums feel more 'transparent'.

Additionally, press news content is likely to vary between titles whereas participants say that TV and radio news content is broadly similar across titles. Reducing the choice of press titles may lead to the loss of some content.

Ownership within and across local media

5.1   Introduction

The subject of media ownership was not introduced until some time into the discussion, in order to judge the level of spontaneous concern around these issues. Participants were then asked for their current knowledge and perceptions of media ownership at the local level, before being given the actual data and asked for their response.

To finish the session they were introduced to four scenarios, each depicting a greater level of cross media ownership:

- All local commercial radio stations owned by the same company

- All local press owned by the same company

- All local press and commercial radio stations owned by the same company

- All local press, commercial local radio and regional TV bulletins owned by same company

Each scenario was introduced to participants with no other alternative and participants were then reminded that the BBC would still be available.

5.2   Current perceptions of local media ownership

Ownership is not raised spontaneously as a concern by any participants. A few participants are aware of take-overs within a single platform (e.g. within press or radio), especially where a title has been re-named as a result, but beyond occasionally lamenting a loss in 'localness', many participants are not overly concerned by the ownership of their local media platforms.

Some participants do express greater concern when the subject is raised. Often this distrust of single and cross media ownership at local level stems from some knowledge of past public debate over ownership of multiple titles at national level.

> *"I'm thinking on a larger scale of the Tesco's of this world where they have literally swallowed up the little boys and all of a sudden you suddenly realise what choice have you got, you have only got Tesco's."* (Norwich)

When participants are supplied with the ownership facts for their local region, they show little surprise. On prompting, they say that they were already aware of the broad levels of ownership, or that the data is in line with their expectations. There seems to be a feeling of inevitability around the subject – a sense that this has already happened to some extent, and that further merging is likely.

> *"I didn't know the extent but I knew that quite a few local papers were all tied in to the one route.*" (Ruislip)

As a result, even those who are concerned by the issues surrounding media ownership are prepared to accept a degree of compromise to save local media. However, the level of compromise depends on their attitudes towards single ownership of media and cross media mergers, discussed below.

5.3   Attitudes towards single and cross media ownership

As we discussed the issues around ownership of local media ownership, participants tended to fall within three broad attitudinal groups:

- 'Not concerned'

- 'Instinctively concerned'

- 'Actively concerned'

'Not concerned'

Most participants fall into this group. They do not identify any issues in relation to single or cross-media ownership. They are comfortable with the idea of single ownership of media at a local level, although largely they are not initially aware of the arguments against it. Even after discussion of the issues, few changed their minds.

> *"It's been like that [single ownership within media] for the last 10 or 15 years probably, it's not going to make any difference"* (Norwich)

Some argue that word of mouth can verify news at a local level and that the high level of user input into the different media platforms, for example through radio phone-ins, letters pages and internet 'have your say' pages, provide sufficient protection. In addition, the appetite for factual and investigative news, rather than analysis and opinion, limits concern about bias.

Participants within this group are more likely to be younger and less local media orientated.

'Instinctively concerned'

Participants in this group are instinctively nervous because of a general awareness that single/cross-media ownership at national level is controversial, but without much understanding of the issues beyond this.

> *"It would be wrong because there's no competition, there's nothing that would make them want to serve people better"* (Ruislip)

Their most solid fear is of a loss of truly local content as a result of single ownership of media. Many anticipate a retreat into more and more distant offices, forcing regional, rather than local reporting. This is of particular concern to participants in the nations, who repeatedly voice concerns that their 'local' news will become 'London-centric' and English.

"It's like Radio 2 that's all about London pretty much isn't it, all local travel - it's all M25 based" (Cardiff)

<u>'Actively concerned'</u>

Overall, few participants fall into this group. They understand and articulate several arguments against single/cross media ownership.

As with the 'Instinctively Concerned' group, they fear a loss of local content. However, their key fears centre on editorial bias – particularly in relation to local politics. They also fear a decrease in quality of journalism due to lack of competition.

"*I agree with that [the concern over cross media ownership] because if this one person was particularly biased, you're only ever going to learn that opinion. I read a lot of different papers and listen to a lot of different things and yeah I have picked up a lot of information over the years, but if I was reading from one source owned by one person and they wanted me to think just of that one view, I would have had a very narrow view of everything all the way along so you've got to be careful, these owners may not have the same view as everybody and it may be that they are trying to make people think in a way that isn't right, that's why I think it needs to be open and fair.*" (Ruislip)

Preventing single ownership within and across media at national level would not make it more permissible at a local level for this group, as they feel local issues are as important as national issues and they worry local issues will not receive sufficient attention at national level.

Participants in this group tend to be older and interested in following local politics.

5.4 Levels of acceptability for ownership within and across media

Most participants, especially those from the 'Not concerned' attitudinal group, are relaxed about single ownership both within and across media. They feel it has already happened to some extent and accept it as the alternative to losing local media.

Concern lessens for some participants when they are reminded that the BBC will still be present as an alternative. Having the BBC plus one other source within radio and TV, or two non-BBC sources within press, is seen as broadly acceptable as this reduces the potential for bias within each platform and consumers are reassured that they will retain their preferred choice of how they access content.

However, as participants are introduced to the four cross media ownership scenarios in turn, some find that the level of ownership contracts to a level which they no longer find acceptable. The point at which they 'drop out' is determined by their general attitude towards, and understanding of, the issues surrounding cross media ownership, as discussed above.

Scenario One - All local commercial radio stations owned by the same company

Single ownership of all radio stations is considered acceptable by most participants, provided choice is retained. Key exposure to local news via radio is in three minute bulletins and this is felt to limit the opportunities for bias, so that only a few, participants with stronger views from the 'Actively Concerned' group 'drop out' at this scenario.

In addition, radio is considered to be more interactive than some other platforms, with more opportunities for people to contribute and shape content via phone-ins etc.

Participants also feel that radio bias is less influential as exposure to content is fleeting – commentary is short and less easy to re-access in comparison to press coverage.

Scenario Two - All local press owned by the same company

Some participants, usually from the 'Actively Concerned' attitudinal group, find single ownership within press unacceptable, mainly because they feel press is the medium most liable to bias. They also fear a loss of 'localness' and a deterioration in quality and depth of content.

However, most participants do not seem overly worried by this scenario, as discussed earlier.

Scenario Three - All local press and commercial radio stations owned by the same company

The few remaining 'Actively Concerned' participants, and many 'Instinctively Concerned' participants, find this scenario unacceptable. Press, radio and TV are the three key, established and engrained sources of local media – participants are used to dipping in and out of all three. Cross media ownership across radio and press causes a greater level of instinctive concern than single ownership within each of these media individually, as it affects two out of the three key media sources.

However, most participants in the 'Not Concerned' attitudinal group still feel that this scenario would not have a significant impact, for the reasons given above.

> "*But it wouldn't be such a bad thing honestly, for them to own the local radio - you're talking about local like Hayes, it's not really a big area, there's not really much of a story to cover round there so therefore for me personally it wouldn't be such a bad idea for them to be running the radio as well*" (Ruislip)

Scenario Four - All local press, commercial local radio and regional TV bulletins owned by same company

The remaining 'Instinctively concerned' participants find this scenario unacceptable, as do a few of the 'Not concerned' group. Cross media ownership across all three platforms is unacceptable for these participants as it has the greatest potential for negative impact on quality and bias.

However, most 'Not concerned' participants remain comfortable with this scenario. As discussed above, this group feel that the increased opportunities for interaction with local

media, plus their preference for factual and investigative news over analysis and opinion, negate any possible concerns over bias. In addition, some feel that a greater contraction of local media ownership is preferable to a further loss of choice.

Multiple Cross Media Ownership

Participants were asked to consider a compromise scenario, where there would be multiple media owners, each owning <u>across</u> platforms but no monopolies <u>within</u> platforms. In this scenario, companies would be restricted from owning all titles within each platform.

This is regarded as a sensible and pragmatic solution which worked for all. Participants feel it gives a choice of news viewpoints and access points. Their key need is to maintain a variety of access points, but they appreciate that this solution can provide a choice of ownership within each platform.

Response to the investment options

6.1　Introduction

In the final exercise participants were asked to undertake a chip allocation exercise, to evaluate their priorities in the light of the information surrounding local media that they had received during the deliberative sessions.

Participants were asked to allocate a hypothetical pot of money across nine different investment options, thinking first from their own, consumer point of view and secondly from the citizen perspective.

The investment options were chosen for the research by Ofcom and were as follows:

- Ensuring the continued provision of regional news

- Support local newspapers

- Support the development of local community media

- Support local commercial radio

- Develop a network of local media websites with new video content

- Provide more areas with local TV

- Ensure rural parts of your area have access to local websites via fixed broadband

- Ensure your local area has access to DAB radio

- Ensure rural parts of your local area have access to local content via mobile phones and mobile broadband

6.2　Investing in local media – The consumer perspective

When deciding investment levels from their personal (consumer) perspective, participants seem most influenced by their own preferred method of access. Maintaining depth and quality of content is far less important than keeping their favourite, habitual interaction platform.

> *Some invest their total budget in their one or two preferred media platforms and are happy to dispense with everything else, aiming to preserve their established local media routine.*

Other participants invest more equally across a wider number of options. Again access is the primary motivating factor for many of these participants, as they aim to preserve a choice of access points to suit their current use.

"I have got my TV, got my local newspapers, I've got my radio... so I can watch it, listen to it, read it" (Norwich)

Some participants chose to invest in supplying universal broadband, even though they themselves already have access to broadband and therefore will not benefit. Universal broadband access is considered so important by these participants that it has their personal, as well as societal, support.

6.3 Investing in Local Media – the Citizen Perspective

Participants adopt different strategies when allocating investment at a citizen level.

Many participants choose to invest in the options that they feel benefit the largest number of people, regardless of content, quality or even access. For this reason, Regional TV received a high level of investment across the sample as it is felt to reach the largest number of people.

> *"Because it [regional news on TV] needs to stay and it needs to be resourced. It is just resourcing what is going on keeping it going and it is quite important. I think it has been around for such a long time, it gives a variety especially London Tonight, it is connecting you know, it is like people talking you know seeing different you have got people's comments on there. It is a variation of things and it is good to keep something up and going like that."* (Norwich)

Other participants invest evenly across all of the investment options. Their priorities in this instance are to maintain a variety of access points to suit as many people's needs as possible. Again, access is considered more important than quality or content when allocating investment along these lines.

> *"I have got commercial radio, local newspapers and local news equally £200 because I think all of them are needed to give maximum coverage."* (Ruislip)

More participants chose to invest in rural fixed and mobile broadband and DAB radio when working from the citizen perspective than from their own, consumer viewpoint. They consider universal access to be very important at this level and many give it equal investment with their preferred local media options – a few give it priority.

> *"I think rural areas because I think you have to support them if they haven't got the opportunity for broadband and things like that."* (Guildford)

Some participants feel that investing in 'future focussed' technologies is important for general development and the good of future generations.

> *"I gave it [Mobile phones/broadband] £300 because I think that's the way the world is going and I think everyone is just going to be on their phones instead."* (Guildford)

Where the amounts invested vary, participants explain that they are guided by the needs of the relevant medium. For example, platforms considered to be in need of development, such as local TV and community media, are felt to need a high level of investment to reach the required standard, whilst longer established platforms, such as regional TV and local press are felt to need smaller levels of investment, to keep them afloat. This prompts a polarised approach to investment, with some participants choosing to invest a large proportion of their money in developing just one or two platforms, whilst others chose to invest smaller sums across a larger number of platforms that they consider to need preserving.

6.4 Investment in local media – Overall responses

Figure 3 illustrates the importance participants place on investing in the different options, when combing their consumer and citizen viewpoints.

Figure 3: Combining the Citizen and Consumer Viewpoints

Base: Qualitative data

Source: Ofcom Review of Local Media conducted by Synovate in May 2009.
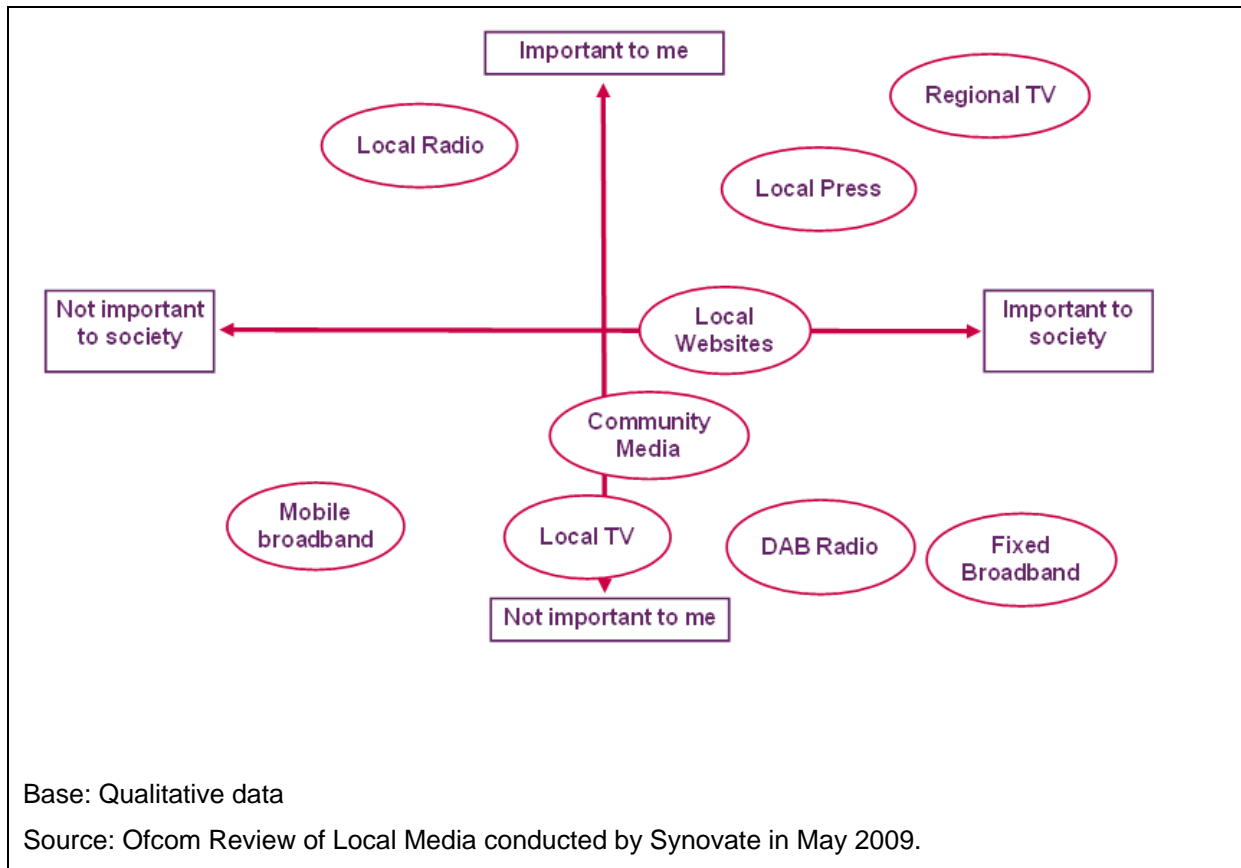
6.5 Regional TV, local press and commercial radio

Regional TV, local press and commercial radio are long-established sources of local media and each has become deeply engrained in people's lives and routines. Many participants have regular, fixed appointments with at least one or two of these media, and use the third when time allows or as a back-up. They are also felt to reach the greatest spread of the population.

> "*We have always had it [Regional TV] I suppose and if it's gone then I think… there would be a gap.*" (Norwich)

As a result, these three media platforms are important to participants, and this ensures they receive consistent investment, from both consumer and citizen viewpoints.

Regional TV is thought to benefit the largest number of people and is easily accessible for all. It therefore receives considerable investment from across the sample of participants.

Local press also receives consistent investment from participants. Participants are aware that local press is struggling and are sympathetic towards the reasons for this; it also holds a

large place in their hearts. For those following local politics, local press is considered vital as it is seen as the only source of reliable, detailed information – these participants consequently invest heavily.

Although local radio occupies a similar position in people's affections and their daily routine as local press and regional TV, it receives less investment from participants. Participants are less aware of the problems besetting radio and believe that radio has more potential to be commercially viable. Lower investment here is often due to a feeling that it would involve using public money to shore up a commercial enterprise.

6.6   Local websites

Local websites are already playing an important role for many participants. They are felt to have the potential to replace local press in the future as they supply written, detailed news that users can access as and when they please.

> *"I think it's just the way the trend is going now - the internet is so popular I think it would encourage people to find out local news when perhaps they wouldn't."* (Cardiff)

Local websites did attract a limited level of investment – largely from younger, internet savvy participants and those who felt it was important to invest in future technologies.

Other participants were held back by the form of the investment suggested – that local websites would receive support in the form of video content from the BBC. They feel that this is ultimately 'double paying' the BBC. Many also felt that increasing video content should not be the key focus of investment – there is a general sense that maintaining localness and depth of written content is more important.

6.7   Community media and local TV

Community media and Local TV tended to receive similar levels of investment. Many participants feel these platforms could have real value for communities, but the level of investment is driven largely by participants' assessment of their viability.

> "*I don't think you can put a high enough importance on it [community media]. If you don't have your community media and local groups, then you wouldn't have a community to be honest. I think to keep that running they need people in the community to know exactly what is happening in your community to make it worthwhile running workshops and art classes and things like that."* (Glasgow)

Local TV is felt to need serious levels of investment to achieve quality content and a sufficient degree of localness. Many participants are positive about the idea in theory, but believe that in practice, too much investment would be needed to achieve quality content and the right level of localness.

Community media is considered to offer better value for money – but has less universal appeal. Only participants with specific links to a community media source would support investment in that source. However, even these participants feel that there are so many specific and separate community media sources that would need investment, that none would receive sufficient assistance to make a significant improvement.

Participants are also held back from investing in these two options as they fear losing more established platforms without gaining a quality substitute. Many participants feel that investment in these platforms would be at the expense of the more established media, with less guarantee of success.

6.8   Universal broadband and DAB access

Participants were offered three separate investment options in relation to universal access – universal fixed broadband, universal mobile broadband and universal DAB access.

Some participants struggle with these individual concepts and this did inhibit their willingness to invest. However, the general theme of equal access is considered to be important – especially, although not exclusively, at citizen level.

> "[*Mobile broadband access*] *Because when I was reading them I was thinking of myself and then I actually thought take myself out of the situation and how would I feel if I was in that area and it is like… we are a country we should be together, just because I am over here doesn't mean that I shouldn't be able to access what they can. And that is how I feel, I feel why should some places be run down, they can't do this, they can't do that, it is such rubbish, they can if they had the resources and everything else for it"* (Ruislip)

Participants tend to allocate funds towards the three equal access options without considering any potential positive impact on local media – equal access is considered important in its own right and not just as a route to more local media access. Consequently, investment at citizen level is comparable with investment in sustaining local media.

Overall fixed broadband is the most popular investment option of the three, as it is the most familiar concept with greater current usage. Indeed, many participants regard it as a 'necessity' in modern day life.

DAB radio and mobile broadband benefit from investment from those participants who feel the strongest about universal access, and, to a lesser extend, from participants who feel universal access to be important, but who struggle to separate its different forms.

Conclusions

7.1 The role of local media

To some extent local media does contribute towards the PSB principles:

Informs our understanding of the world

At a functional level, local media provides access to information which facilitates day to day life in a community – for example, by providing traffic reports and information about local events.

At an emotional level, local media connects people with their local area – the people and places they know and the topical issues facing their area, for example. For some, local media goes some way to preserving community spirit.

Reflecting UK cultural identity

Local press titles are seen as symbols of local identity and therefore there is a strong desire to preserve them, particularly for those who are more engaged with their local communities.

Local media creates opportunities for the local voice to be seen and heard. This is particularly important in the nations where people feel strongly about retaining their distinct national identity.

Stimulating knowledge and learning

On a day to day basis local media tends to satisfy more basic information requirements than stimulate a further enquiry into the local area for most people.

However, events of more than ordinary importance may prompt a deeper information need in relation to that specific event. Additionally, some people do have a desire to learn more on an ongoing basis about specific issues in their area, particularly local politics.

Local media, particularly press and internet, have a role to play in both these scenarios.

Representing diversity and viewpoints

People appreciate the opportunities provided by local media to share views, for example through letters to the editor, radio phone-ins and internet 'have your say' pages.

Community media allows particular people and groups to share and promote their specific interests – for example campaign causes and BME specific content. However, it is not yet considered a well established media source as it is produced relatively sporadically and is often perceived to be of poor quality. Additionally, actual awareness and usage of community media is relatively low.

7.2 Substitution, choice and media ownership

People are concerned by the prospect of losing any individual media platforms as they value a choice of access points and are keen to maintain their preferred repertoire of media occasions. If some access platforms cannot be preserved, then it is important to maintain a choice of content levels – greater depth of content via either press or online as well as a more topline level of detail through either TV or radio.

People are slightly more concerned by a loss of choice within press, where they are often influenced by their affiliation with their own preferred title. A few also suggest that there is more potential for bias within press, but this is not a consideration for many. Within radio, choice is important in terms of music and presenters, but not in connection with local news, where the BBC is felt to provide sufficient alternative. Within TV, even people who prefer ITV news to BBC agree, if forced, that as news content is broadly similar they would accept having BBC news only.

Many people do not feel that a greater level of ownership within and across media would impact significantly on their local media landscape, particularly if choice can be maintained as a result. Those who are more concerned by the thought of cross media ownership would prefer to allow ownership across the media platforms whilst maintaining multiple ownership within each medium.

7.3 Investment options

People believe it is important to maintain the three traditional media – TV, radio and press. From the consumer perspective, this is in order to ensure the continued existence of their own preferred method of accessing local media. From the citizen viewpoint, they are keen to ensure local media is available to the maximum number of people and they believe these three media have the greatest reach. Local websites are also considered a valuable target for investment - whilst some people do not yet feel the internet can supply all the local media needs, many believe it will do so for future generations.

Some people believe community media and Local TV could play an important role in their local media landscape. However, they also express fears that too great a level of investment would be required to bring either platform to a standard where it could replace more established sources. Consequently, they would rather preserve the platforms that they already feel work well, rather than risk losing them in favour of an enterprise that may not succeed.

Universal broadband access is considered to be of equal importance to the preservation of local media. From the citizen perspective in particular, it is thought that fixed broadband access should be available to all. There is less support for investment of public funds for providing universal mobile broadband, which is considered to be less of a necessity.

Methodology

A.1 Research methodology

A deliberative methodology was adopted. This methodology allowed time to explore relevant issues and opportunity to introduce information. It also allowed for bringing different consumer types together to help understand both the consumer and 'citizen' perspective and provoke discussion on future needs.

Seven deliberative workshops were carried out with 18 participants in each. Within each workshop there were two tables of nine respondents. Workshops were three hours long and included discussion, self completion tasks and presentations. The discussion guide is located in Appendix B.

For the first section of each workshop where participants discussed local media usage and attitudes participants were split into local media usage group (heavy and lighter media users – see sample for precise criteria). This allowed us to build a picture of each groups current usage and attitudes. Groups were then rearranged in Session 2 with four of each group joining the other. The participants that moved groups were picked at random other than that half were male and half female. This enabled participants to discuss with individuals that had different levels of usership and attitudes towards local media. This was important to allow dynamic and interesting discussion on the issues facing local media and potential solutions.

It is important to note that as a result of the user groups being mixed only verbatims from the first section of the workshop (before mixing) can be attributed to local media usage level.

Participants were asked to complete a homework exercise which they brought to the groups. This included a local media diary and locating examples of community media from their area.

Workshop stimulus summary

A number of items were used to stimulate discussion and inform participants of relevant issues.

- Session 1

  o Local media showcards – used to prompt discussion on local media titles. Titles provided by Ofcom

  o Community Media showcard – used to define and explain the concept of community media. Developed by Synovate. See Appendix D.

- Session 2

  o Presentation: Local media trends and issues. Prepared by Synovate using Ofcom's *Review of Local Media* document. See Appendix C.

  o Self completion task: Ranking and point allocation exercise to understand importance of each media platform to individuals. (Two versions – local TV channel was included in task in locations with a local TV channel, in locations

where no channel existed it was not included in the task) Developed by Synovate. See Appendix E.

- o Cross (and single) media ownership scenario showcards. Developed in conjunction with Ofcom. See Appendix F.

- o Local press and radio ownership showcards. Developed in conjunction with Ofcom. See Appendix G.

- Session 3

  - o Presentation: Investment options. The presentation introduced nine options for investment into local media. Developed in conjunction with Ofcom. See Appendix H.

  - o Self completion task. Participants were allocated a figurative pot of £1000 and asked how they would invest it for themselves and their reasons. After group discussion they were the asked to re-invest it for the good of others. Developed by Synovate. See Appendix I.

  - o Local TV showcard. TV listings for Channel M, to illustrate potential local TV offering. Developed by Synovate in conjunction with Ofcom. See Appendix J.

A.2   Sample

Research needed to explore the current situation as well as review opportunities for the future of local media. To achieve this end the sample was split to understand views and requirements of those heavily engaged with local media as well as lighter local media users. A spread of internet usership was also represented in order to understand views on opportunities for online solutions. All respondents were required to express an interest in finding out about their local area.

The sample was split into two groups of nine for each workshop:

- Group 1: Current heavy local media users

Local media usage	
Any local content	All participants to use at least two local media sources regularly
Local TV (network TV)	At least 6 participants to watch local programmes at least twice a week
Local radio	At least 3 participants to listen to local radio at least twice a week
Local newspapers	At least 4 participants to read local papers weekly
Local internet services	None to use

Demographics	
Gender	4 male, 5 female
Age	2 aged 45-54, 3 aged 55-64, 4 aged 65+
Socio-economic group	At least 3 ABC1 and 3 C2DE, others to fall out naturally

- Group 2: Using Internet for local media more than in the past / using other media sources less than in the past

Local media usage	
Any local content	All participants to use one local media source regularly/ occasionally
	All to express an interest in finding out about their local area
	At least 2 to use internet for local media more than before
	At least 3 to use any of radio, newspaper, TV less than before (please recruit a mix of radio, newspaper and TV)
Local TV (network TV)	Maximum of 4 participants to watch local programmes
Local radio	Maximum of 1 participant to listen to local radio
Local newspapers	Maximum of 2 participants to read local newspapers
Local internet services	At least 2 participants to use the web to find local content
	All participants to be regular internet users and use the net for both news and non-news content
Demographics	
Gender	4 male, 5 female
Age	3 aged 18-24, 4 aged 25-34, 2 aged 35-44
Socio-economic group	At least 3 ABC1 and 3 C2DE, others to fall out naturally

The research was carried out in seven UK locations between 21st April and 7th May 2009:

- England

  - o Ruislip

  - o Guildford

  - o Manchester

  - o Mansfield

- Wales
  - Cardiff
- Scotland
  - Glasgow
- Northern Ireland
  - Belfast

Topic Guide/Questionnaire

Timing	Session	Materials
18.30 – 18.35	***Welcome and introduction*** Aims, objectives and format of session	Introductory presentation
18.35 – 19.25	*Groups 1 & 2 separate for this section* ***Local Media Usage and Attitudes*** **Introductions (5 minutes)** **Their Local Media Universe (20 minutes)** *Using their pre tasks as stimulus, respondents will be asked to build their local media universe. To do this, we will ask the following questions for press, radio, TV and online. (The questions set out below are for TV, they would be adapted as necessary for the other media platforms.)* Please can you tell me how regional or local TV fits into your local media consumption? *Who uses it, how much, where, when* How do you feel about it? Does it meet your needs? What type of content do you use this media platform for? *Prompt for local news, local information and local entertainment.* Why? Key Drivers to use of media platform? Which channels / programmes are available in this area? *Moderator will record all sources mentioned onto mapping cards and will prompt for any key titles that have been missed.*	Input from pretask Cards printed with names of local media

	For each channel / programme mentioned, moderator will ask: What do you think of this? *Listen for spontaneous then prompt for levels of perceived quality and trustworthiness* Have you noticed any changes happening within this media over the last few years? Prompt for changes in quality of local journalism/perceptions of how this might continue to change in the future…probe for what has changed/reduced quantity – driven by what aspect of content? **Council publications – probe on use of these, thoughts on content compared to local press. How does the quality compare, preference for this type of information – council or local papers….** **Community Media (5 minutes) Online and Hard copy** *Moderator to show community media showcard and ensure group fully understands the concept* How do you feel about community media? Trust etc. What type of content do you use this media platform for? How involved – consumer/participator/creator? Interest in getting involved in participating/creating local content. *Listen for spontaneous then prompt for local news, local information and local entertainment* What community media sites were you using before beginning this research? Importance of brands in online content – more/less important than other media – why? *Moderator to record all sites mentioned onto cards then probe as follows: Who using community media, what, where, when, how often and why* What community media sources did you discover during your pre task? *Moderator to record onto cards* What do you think of this title/ site / programme / station? How do expectations compare to other local media – higher/lower? Why? *Listen for spontaneous then prompt for*	Community media showcard (NB respondents will have been sent a community media definition and will have been asked to find community media examples as part of their pretasks – these will be used as stimulus for this part of the discussion.)

	levels of perceived quality and trustworthiness **Overall Attitudes towards Local Media (5 minutes)** Citizen and consumer views on what local content <u>should</u> be provided – but also what would actually be used Distinctions between journalistic news (i.e interpretation and opinion) and straight informative news – when do they need journalistic news and why *NB During this discussion we will not ask specifically about ownership as this risks influencing the level of importance they attach to it, but if the topic arises spontaneously we will probe respondents' awareness and opinions.*	
19.25 – 19.35	***Presentation: Local media trends and issues*** Presentation covering the structural problems facing local media, current consumption data and trends/future prediction	Workshop Presentation Media Trends
19.35 – 20.25	*Groups 1 & 2 mixed for this section* **Discussion: Plurality, Substitution and Ownership** **Response to Presentation (5 minutes)** How did you feel about the information in the presentation? How would you feel if local media did dwindle away? How important is it for government to try and support local media? **Value in terms of delivering local news (15 minutes)** ***Working individually on paper, respondents will be asked to mark the following media out of ten, where 10 means 'Very important to me' and 1 means 'not at all important to me' in terms of delivering local news.*** ***Respondents will also be given 10 points to allocate across the media sources and asked to explain their allocation briefly:*** 1. National press (e.g Times, Guardian, Daily Mail, Sun,	Local media universe map created in Session Two Self completion ranking and point allocation exercise

Express)

2. Regional press (e.g. Scotsman, Yorkshire Press, Manchester Evening News, Western Mail)

3. Local Press

4. Local Radio (BBC local or local commercial stations)

5. Local websites

6. Community Media

7. Regional TV (ITV regional, STV, BBC regional)

8. Local TV (dedicated local TV channel) – not to be confused with Regional TV. (NB LOCAL TV WILL ONLY BE INCLUDED FOR MANCHESTER, BELFAST AND CARDIFF)

At the end of the written exercise, the moderator will briefly probe to explore where their priorities lie. ORDER ROTATED ACROSS THE GROUPS

What mark out of 10 did you give this media platform? Please explain your answer.

How many points did you allocate to this media platform? Please explain your answer? *If more than one platform has same amount explore whether reasons are the same or whether each media is equally valuable for different reasons – i.e. TV for depth of news Radio valued for up to date/time critical information.*

How does it compare to the other media platforms?

Why not allocate any points to some media?

Thinking now about other types of local content:

Which is best for local information/listings?

Which is best for local entertainment/reviews etc?

Deprivation Exercise (15 minutes)

We will use a deprivation technique to establish priorities for local news across the media platforms in turn, order to be rotated across the groups. Respondents will be asked to imagine they are in a hot air balloon, with all the media

	platforms listed above. We will explain that the balloon is sinking and they must choose which source to jettison in order to save it. We will repeat the exercise until there are no platforms left.	
	As each media title / channel is discarded, we will ask:	
	Why have you chosen to lose that media platform?	
	How difficult was the decision?	
	What impact would losing that have on your local media coverage?	
	How would you use the other media sources to cover for its loss?	
	What would the other media sources need to do to cover for its loss?	
	If they made those changes, what, if anything, would still be missing?	
	How would you feel about your local news coverage if there were just these remaining sources?	
	TV, Radio and Press	
	For TV, Radio and Press in turn, the moderator will ask respondents to imagine that the available programmes/ stations / titles gradually disappear until only the BBC remains:	
	How would you feel if all of these programmes / stations / titles were lost?	
	What impact would it have on your local news coverage?	
	What would you still be able to access elsewhere?	
	What would be lost?	
	Plurality and Cross Media Ownership (15 minutes)	
	How many of the owners of any of these local media sources can you name?	
	Are you aware of any changes in ownership from recent years?	
	What can you tell me about them?	
	Now focussing on local press, how many	Cross media ownership

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	companies/organisations own your local press titles?	showcard
	The moderator will explain the concept of cross media ownership to the respondents, using a show card.	
	Using showcards, the moderator will then ask respondents to imagine the following scenarios:	Cross media scenario showcards
	1. All local press owned by same company	
	How would you feel if this happened?	
	What impact would this have on local news provision*? Listen for spontaneous then prompt for perceptions around journalistic integrity – prompt for positives/negatives*	
	If this happened, you would still have the BBC and multiple national press/multiple national radio and multiple websites would still be available. What difference would they make?	
	Now thinking about radio. *Moderator to introduce next scenario*	
	2. All local commercial radio stations owned by same company	
	How would you feel if this happened?	
	What impact would this have on local news provision? *Listen for spontaneous then prompt for perceptions around journalistic integrity– prompt for positives/negatives*	
	If this happened, you would still have the BBC/ and multiple national press/multiple national radio and multiple websites would still be available. What difference would they make?	
	How does this compare to single ownership of Press – same, better or worse?	
	Moderator to introduce third scenario	
	And what about…	
	3. All local press and commercial radio stations owned by the same company	
	How would you feel about this level of cross-media ownership?	

	What impact would this have on local news provision? *Listen for spontaneous then prompt for perceptions around journalistic integrity– prompt for positives/negatives* If this happened, you would still have the BBC/ and multiple national press/multiple national radio and multiple websites would still be available. What difference would they make? And finally, what about 4. All local press, commercial local radio and regional TV bulletins owned by same company How would you feel about this level of cross-media ownership? What impact would this have on local news provision? *Listen for spontaneous then prompt for perceptions around journalistic integrity* If this happened, you would still have the BBC/ and multiple national press/multiple national radio and multiple websites would still be available. What difference would they make? *Show respondents the current Press ownership for their area:* This is what the situation is at the moment, how do you feel about that? Does it surprise you? Has this information changed your opinion? In what way? Overall: Knowing what you now know about local Press ownership how important is it to have a spread of ownership within each media platform? How important is it to have a spread of ownership across media platforms? Does the spread of ownership at national level impact on that? How does cross media ownership compare at a national level to a local level?	Local press ownership boards

20.25 – 20.35	**Comfort Break / Contingency time**	
20.35 – 20.45	***Presentation: Investment Options*** Presentation covering the nine investment options	Investment Option presentation

20.45 – 21.25	*Groups 1 & 2 mixed for this section*
	
	Discussion: The relative value of different aspects of local media
	
	Investment in Local Media (45 minutes)
	
	Working individually on paper, respondents will be given a figurative pot of £1000 and asked how they would invest it for themselves and their reasons:
	
	   ⇒ Continued provision of regional news on TV
	
	   ⇒ Support local newspapers
	
	   ⇒ Support the development of local community media
	
	   ⇒ Support local commercial radio
	
	   ⇒ Develop a network of local websites with new video content
	
	   ⇒ Provide more areas with local TV
	
	   ⇒ Ensure rural parts of your local area have access to local websites via fixed broadband
	
	   ⇒ Ensure your local area has access to DAB radio
	
	   ⇒ Ensure rural parts of your local area have access to local content via mobile phones and mobile broadband
	
	For each option the moderator will then ask:
	
	How much money did you choose to invest in this option?
	
	Please can you explain your answer?
	
	What would be the advantages behind investing in this?
	
	What would be the disadvantages?
		Powerpoint showcards for each investment option
		
		Self completion £1000
		
		TV listings for Channel M, to illustrate potential local TV offering

	How important is this option in comparison to the others? Why? *At the end of the discussion, respondents will be asked to re-allocate their £1000 in terms of what would be best for everyone (citizen view):* What changes did you make and why?	
21.20 – 21.30	Summary, thanks and close	

Media trends presentation

An overview of local media consumption in the UK

- People like to know what's going on in their local area

- Overall use of any local media remains relatively high however there has been some decline since 2005

- Tends to be linked to age – consumption of local media tends to be higher amongst older consumers

- Newspapers and ITV news most used sources – a third use BBC websites and a quarter of broadband customers use local news websites on weekly basis

Consumption of local TV and radio is falling…

- Since 2001 a steady decline in the consumption of early and late evening news bulletins
  - Previously a common way to access local news

- In radio, local commercial radio's share of listening hours has declined while national and BBC radio stations share's have increased

  - the share of listening hours for all BBC radio stations have increased slightly since 2003
  - and the share of listening hours for national commercial radio have increased substantially

But the most significant changes have been in newspapers, with fewer reading overall

- Long term decline in circulation of local and regional newspapers

- Decline in the proportion who use local newspapers as their main source of local news

- People are more than twice as likely to read a national newspaper compared to local newspapers in a typical 5 day week
  - 17% of people said they read a local newspaper five days a week compared with 40% who read a national paper

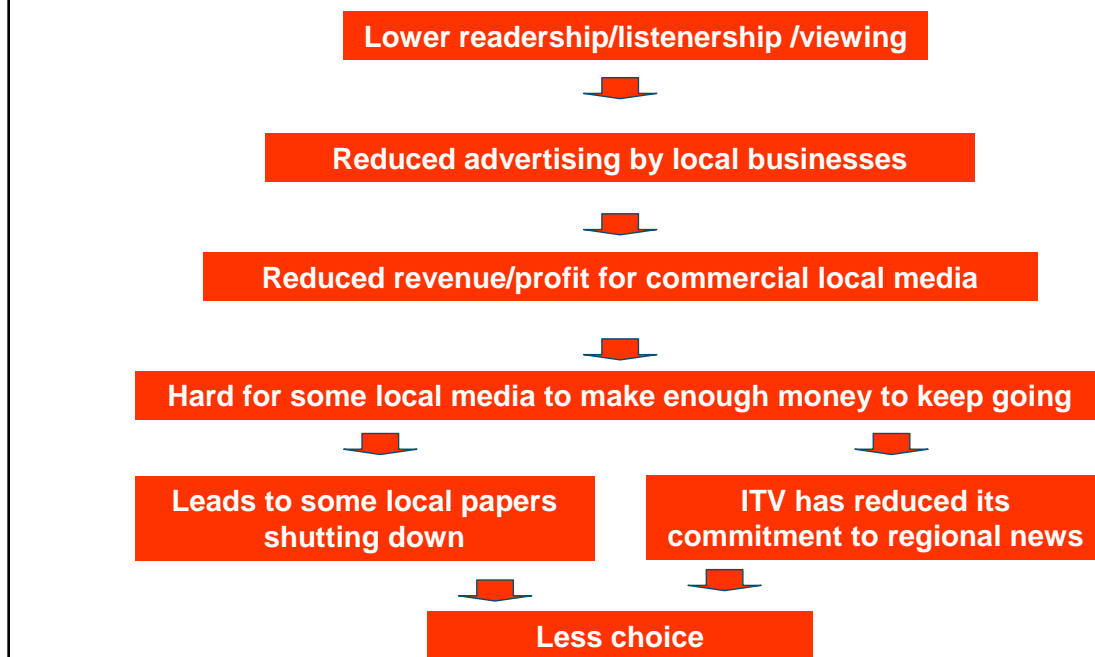## Local media need revenue from advertising to exist but…

- There is a decline in local businesses advertising locally

- Advertising revenues have shifted away from local to national media

- Local brands have been replaced by high street names which don't need to advertise in local media

- Competition for advertising from local authority publications

Advertising revenues have shifted away from traditional to online media

- Some revenue from printed classified advertising is now spent on internet advertising – particularly Google

- Reflects the increased use of online platforms
  - Broadband usage increased by nearly 60% in the last 5 years
  - 1 /10 people who use broadband say they now consume more local news via websites
  - Local news websites may be replacing local TV news bulletins for some

So what does this mean for local media?

Lower readership/listenership /viewing

Reduced advertising by local businesses

Reduced revenue/profit for commercial local media

Hard for some local media to make enough money to keep going

Leads to some local papers shutting down

ITV has reduced its commitment to regional news

Less choice

Opportunities for the future of local media

- Local television stations (e.g. Channel M in Manchester)

- The internet offers local media providers the opportunity to reach new audiences

  - Local councils who used to go through local newspapers to report their activities now do this themselves through the internet

  - **Community internet sites** (such as Talk about Local) are playing an increasing role in providing local information

But how effective are these as sources of local media?

- **Local television** has yet to demonstrate that it can be profitable

- At present, **online sources** have not yet proven to make up for falling revenues from local print media

- **Community websites** tend not to be profitable as run on non-profit lines and rely on volunteers

Community media showcard

What is community media?

- **Community media sources** also provide you with local content about what it going on in your community but tend to be produced directly by voluntary or community groups. They are usually available free of charge.

- Some examples may include:

  - Community group websites
  - Community newsletters (e.g. school newsletters, parish newsletters)
  - Community radio

A school newsletter

Parish newsletter

Self completion task – point allocation exercise

Session Two Allocation Exercise

First Name:…………………………...

Media platform	Importance to me	Point Allocation	Reason(s) why
National press eg. Times, Guardian, Mail, Sun			
Regional press eg. Scotsman, Yorkshire Press, Western Mail, Manchester Evening News			
Local press			
Local radio eg. BBC local or commercial local stations			
Local websites			
Community Media			
Regional TV eg. ITV regional, STV, BBC regional			
Local TV - a dedicated local TV channel – not to be confused with regional TV			

Note: You can allocate 0 points to any platform if you wish

Cross media ownership scenarios

Cross Media Ownership

- We could help prevent the loss of some press titles or radio stations by allowing more cross media ownership, for example:

  - Letting one newspaper merge with another so that both titles were owned by the same company

  - Letting a local radio station merge with a local newspaper so that both would be owned by the same company

- This would allow the papers / radio stations to run more efficiently as they would be able to share expertise and resources and cut down on costs

Scenario One

- All local press owned by the same company

- BBC still available

- National press and radio still available

- Multiple websites with local news and information

- Community media – both online and newsletters

Scenario Two

- All local commercial radio stations owned by the same company

- BBC still available

- National press and radio still available

- Multiple websites with local news and information

- Community media – both online and newsletters

Scenario Three

- All local commercial press and commercial radio stations owned by the same company

- BBC still available

- National press and radio still available

- Multiple websites with local news and information

- Community media – both online and newsletters

Scenario Four

- All local press, commercial local radio and regional TV news bulletins owned by the same company

- BBC still available

- National press and radio still available

- Multiple websites with local news and information

- Community media – both online and newsletters

Local press & radio ownership showcards

Ruislip	
Title	**Owner**
Harrow & Wembley Observer	Trinity Mirror plc
Heathrow Skyport	Trinity Mirror plc
West London Informer	Trinity Mirror plc
Uxbridge & Hillingdon Leader	Trinity Mirror plc
Uxbridge Gazette Series	Trinity Mirror plc
Hillingdon & Uxbridge Times	Newsquest Media Group
Watford Observer	Newsquest Media Group

Guildford	
Title	**Owner**
Farnham Herald Series	Tindle Newspapers Ltd
Aldershot Mail Series	Guardian Media Group Plc
Surrey Advertiser	Guardian Media Group Plc
Surrey Times Series	Guardian Media Group Plc
Woking News & Mail Series	Guardian Media Group Plc

Cardiff	
Title	**Owner**
Glamorgan Gem	Tindle Newspapers Ltd
Barry & District News	Newsquest Media Group
South Wales Argus - Newport	Newsquest Media Group
Hereford Times	Newsquest Media Group
Penarth Times	Newsquest Media Group
Pontypridd Observer Group	Trinity Mirror plc
South Wales Echo	Trinity Mirror plc
The Post - Cardiff	Trinity Mirror plc
Wales - Western Mail	Trinity Mirror plc
Wales on Sunday	Trinity Mirror plc

Norwich	
Title	**Owner**
Diss Express	Johnston Press Plc
Dereham & Fakenham Times	ARCHANT
Diss Wymondham & Attleborough Mercury	ARCHANT
Great Yarmouth Advertiser	ARCHANT
Great Yarmouth Mercury	ARCHANT
Lowestoft & Beccles Journal Group	ARCHANT
Norfolk Eastern Daily Press	ARCHANT
North Norfolk News	ARCHANT
Norwich Advertiser	ARCHANT
Norwich Evening News	ARCHANT
Thetford & Watton Times Series	ARCHANT

Manchester	
Title	**Owner**
Manchester Evening News	Guardian Media Group Plc
North East Manchester Advertiser	Guardian Media Group Plc

Mansfield	
Title	**Owner**
Nottingham Evening Post	Northcliffe Media Ltd
Derbyshire Times	Johnston Press Plc
Mansfield & Ashfield Chad	Johnston Press Plc
Worksop Guardian Series	Johnston Press Plc

Belfast	
Title	**Owner**
Lisburn Echo	Johnston Press plc
Ulster Star	Morton newspapers owned by Johnston Press plc
Dromore & Banbridge Leader	Morton newspapers owned by Johnston Press plc

Glasgow	
Title	**Owner**
Arran Banner	Oban Times Ltd
Clydebank Post	Clyde & Forth Press Ltd
Daily Record - Scotland	Trinity Mirror plc
The Glaswegian	Trinity Mirror plc
Bearsden Milngavie & Glasgow Extra	Johnston Press Plc
The Strathkelvin Advertiser	Johnston Press Plc
Glasgow South & Eastwood Extra	Johnston Press Plc
Kirkintilloch Herald	Johnston Press Plc
Scotland On Sunday	Johnston Press Plc
Glasgow - Evening Times	Newsquest Media Group
Sunday Herald - Scotland	Newsquest Media Group
The Herald - Scotland	Newsquest Media Group

Cardiff	
BBC Radio Wales	BBC
Gold South East Wales (was Capital Gold Se Wales)	GLOBAL
Red Dragon	GLOBAL
Kiss West	BAUER
Nation Radio (was XFM South Wales)	TOWN & COUNTRY
Real Radio (Wales)	GMG

Norwich	
99.9 Radio Norwich	TINDLE
BBC Radio Norfolk	BBC
Big L Radio	UNKNOWN*
Gold Norfolk (was Classic Gold Amber Norfolk)	GLOBAL
Radio Norfolk	GLOBAL
North Norfolk Radio	TINDLE
Kiss East	BAUER

*NOT REGULATED BY OFCOM (BROADCASTS FROM HOLLAND)

Manchester	
96.2 The Revolution	WIND UP MEDIA (STEVE PENK)
BBC Radio Manchester	BBC
Century Radio (north West)	GMG
Galaxy Manchester	GLOBAL
Gold Manchester (was Capital Gold Manchester)	GLOBAL
Key 103 (Manchester)	BAUER
Magic 1152 (Manchester)	BAUER
Smooth Radio (north West)	GMG
XFM Manchester	BAUER

Mansfield	
BBC Radio Nottingham	BBC
96 Trent FM	GLOBAL
Gold Nottingham (was Classic Gold Nottingham)	GLOBAL
Heart 106 (formerly106 Century FM)	GLOBAL
Radio Mansfield 103.2	INDEPENDENT
Smooth Radio (east Midlands)	GMG

Belfast	
BBC Radio Ulster	BBC
Citybeat 96.7FM/102.5FM	CN RADIO
Downtown Radio (dtr)	BAUER
97.4 Cool FM	BAUER
U105	UTV

Glasgow	
BBC Radio Scotland	BBC
Clyde 1 FM	BAUER
Clyde 2	BAUER
96.3 Rock Radio	BAUER
Real Radio (scotland)	GMG
Smooth Radio (glasgow)	GMG
XFM Scotland (west)	GLOBAL

Investment options presentation

Ensure the continued provision of regional news
on TV

- ITV has indicated that it may pull out of its commitment to provide regional news by 2011

- Alternative news provision could be provided by funding independent news consortia to tender for slots on ITV

- The BBC will continue to provide regional news on TV

Support local newspapers

- Local newspapers are struggling to maintain profitability due to reduced readership and advertising revenue
- Funding could be used to subsidise local journalism – for example for reporting of local council activities

Support the development of local community media

- Support could be given to community media, for example local websites and local community publications
- Community media are valuable community resource which help get people together. However, they are entirely funded by voluntary efforts which can hamper their development
- Assistance could be in the form of:
  - Direct funding
  - Investment in training
  - Provision of audio and visual material

Support local commercial radio

- Local commercial radio stations are struggling to maintain profitability but provide an alternative to BBC local stations

- Funding could be used to subsidise the creation of local news content for local commercial radio stations

Develop a network of local websites with new video content

- Use of the internet as a source of local media has been rising but most local websites don't have video content as this is too expensive to create
- Funding could be given to the BBC to produce local video content which would be available for use on websites

Provide more areas with local TV

- Local TV is available in some areas - for example, Channel M in Manchester

- Local TV brings more focused local news and local content to local viewers

- Funding could be used to provide your area with its own dedicated Local TV channel

- Local TV would be available on Freeview

Ensure rural parts of your area have access to local websites via fixed broadband

- Some rural parts of the UK do not have access to broadband and therefore do not have access to local content on the internet

- Funding could subsidise an increase in coverage so that rural parts of your local area have access to broadband at comparable speeds

Ensure your local area has access to DAB radio

- There are parts of the UK where DAB radio is not currently available
- DAB provides people with a greater choice of local radio stations
- Funding could be used to subsidise the building of more DAB transmitters which would provide greater coverage

Ensure rural parts of your local area have access to
local content via mobile phones and mobile broadband

- Mobile networks could be improved so that there is better
  and more complete coverage of both mobile phone and
  mobile broadband services
- This will allow wider access to local content via the
  internet and mobile phones
- Funding could be used to invest in creating and
  improving mobile networks

Additional Information on mobile broadband

- Mobile broadband allows users to access the internet 'on the
  move' at speeds similar to home broadband connections

- Mobile broadband connects to a mobile network using a mobile
  'dongle' or data card via a laptop, mobile handset or other
  devices

Additional information on local TV

- Local TV would be channel/s on Freeview providing local news, information and programme about where you live – your local town/county
- Local TV would cover a smaller area than existing regional programmes you may have seen on BBC or ITV
- Local TV channels provide local news, interviews with councillors and local people about local issues, local sports and information on what is happening in your area
- Local TV channels might also allow opportunities for viewers to get involved and take part in broadcasting
- Local TV would advertise local businesses

Self completion task – pot of £1000

Option	Amount invested	Reason(s) why
Continued provision of local news	£	
Support local newspapers	£	
Support the development of community media	£	
Support local commercial radio	£	
Develop a network of local websites with new video content	£	
Provide more areas with local TV	£	
Ensure rural parts of your local area have access to local websites via fixed broadband	£	
Ensure your local area has access to DAB radio	£	

Ensure rural parts of your local area have access to local content via mobile phones and mobile broadband	**£**	

Note: You may allocate £0 to any option if you wish

Local TV showcard

Sports Central

Manchester is city renowned for sport and Sports Central will encapsulate all the positive sporting achievements in the region. A mixture of action, interviews, features and chat ,

The Great Manchester Football Show

Weekly round-up of all the region's football news, interviews with some of the game's leading names and local Reserves, Academy and Non-League action.

Breakfast@channelm.co.uk

Start your day with Channel M's breakfast show.Traffic and travel, news and weather every 30 minutes plus entertainment and inspiring stories from the people of Manchester.

Channel m News

Join Andy Crane as he brings you the latest and ONLY news bulletin dedicated for and about Greater Manchester - every weekday at five. Including local news headlines and reports, sport and entertainment

Community Focus

To raise awareness of the varied range of local charities and community groups that work across Greater Manchester and share the unique stories of the people associated with them.

Fun for the family

From rollercoasters and activities, to food and facilities, Channel m brings you family fun to keep you entertainmed during the summer holidays

City Life Social

The focus is live music and chat with the very best bands and artists from around the city, further afield and touring bands passing through.

Exercise Northern Warrior

Gerry Mclaughlin spent five intensive days with the infantry section of the Duke of Lancaster's regiment. From the obstacle courses to the artillery, Gerry gets a taste of life with the potential troops to see if he can really 'Be the Best'.

Reel North

Produced at the International Media Centre at Salford University, this award-winning programme features quality short films from Manchester, the UK and around the World.

Love Manchester

Join Steph Elmore for a brand new series of 'I love Manchester' where we visit Greater Manchester's prominent buildings, and hidden gems.

Style in the City

Jemma Gofton presents Style in the City... the programme that brings you everything stylish from the fashion and beauty scene in Manchester.

City Life

City Life is Greater Manchester's essential weekly entertainment show, featuring the best of what's happening in and around Manchester.

Local media pre task

Hello

Thank you very much for agreeing to take part in our research project. To help you prepare for the workshops, we need you to fill in this media diary every day, for one week leading up to the research.

All we need you to do is keep a record of all the media you use during the week. This includes TV, Radio, Newspapers (paid for and free), magazines and specific internet sites. For each one, please record the time you were using it, exactly what you watched / read / listened to (i.e. programme, website etc) and the reason why. There is an example for you to look at.

Please be as detailed as you can – if you run out of space, please go onto a separate sheet. You can handwrite or type your answers, what ever is easiest for you. Try to update your diary every day – it's really hard to remember all the detail if you have to think back too far!

Thanks very much, we look forward to meeting you at the workshops – please remember to bring your diaries with you.

Weekly Media Diary : Example

Name: *Example*   Day of the week: *Monday*

Time	What	Why
e.g. 7.30 – 8.30am	GMTV	Good way to catch up with the news in the morning while you're getting up – plus it tells you if there are any travel delays
8.30am – 9.30am	Local paper	I like to catch up on local news on my way to work
12 – 1pm	Marie-Claire	Celebrity gossip – we all swap magazines at work so we get to read them all
5.30 – 6pm	Heart fm	Good to unwind to on the way home
7pm – 9pm	TV	Watch Emmerdale and Eastenders because I like keeping up with the soaps, then Blue Planet – I really like nature documentaries
9pm – 9.30pm	Internet	Checked my bank account online, then spent a while looking for plane flights for our holiday. Visited www.ebookers.com, www.lastminute.com and British Airways' website.

Community media pre task

Name:
Age:
Address:

- Please complete the following brief exercise and bring it along to your group

What is local media?

- Local media provide you with local content about your local area or region

- Local media sources include:
  - Local newspapers

  - Local television

  - Local radio stations

What is community media?

- **Community media sources** also provide you with local content about what it going on in your community but tend to be produced directly by voluntary or community groups. They are usually available free of charge.

- Some examples may include:

  - Community group websites
  - Community newsletters (e.g. school newsletters, parish newsletters)
  - Community radio

A volunteer run news website

A school newsletter

Parish newsletter

Your examples of community media sources

- We would like you to find at least 3 examples of community media sources from your area and bring them along to your group

- Try to find a mix of online and press sources

- If you select a community website please bring print out the homepage and bring it along with you

- *Remember – we are looking for examples of **community media sources**, not local media sources!*

  THANKS FOR YOUR TIME AND WE'LL SEE YOU SOON!