

Assessing the value of public service programming on ITV1, Channel 4 and Five

Summary Report

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Prepared for:



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1.0 Background

Ofcom (Office of Communications) is the regulator for the UK communications industries, with responsibilities across television, radio, telecommunications and wireless communications services. Ofcom has a duty to assess the designated public service broadcasters, taken together, in terms of their delivery of the public service purposes set out in the 2003 Communications Act and to make recommendations with a view to maintaining and strengthening the quality of Public Service Broadcasting in the future.

Ofcom is in the process of undertaking its second Public Service Broadcasting (PSB) Review which is due to complete in early 2009ⁱ. The objectives for this review are:

- To evaluate how effectively the public purposes of Public Service Broadcasting are being met by the public service broadcasters, particularly in light of changes in the way audiovisual content is consumed and delivered;
- To assess the case for continued intervention in the delivery of audiovisual content to secure public service purposes;
- To consider whether and how the emergence of new ways of delivering content to consumers and Citizens might require change in the regulatory framework for Public Service Broadcasting; and
- To assess future options for funding, delivering and distributing Public Service Broadcasting, in the context of the uncertainty established in the first PSB Review about the sustainability of traditional funding models.

. This second PSB Reviewⁱⁱ consists of three stages:

- Phase 1 (October 07 to April 08) examined the extent to which the public service broadcasters are currently meeting public services purposes, the issues facing them in future and assessed their likely ability to meet existing requirements in the future. It also included a range of models for delivering public service content in the future. Ofcom published a consultation document of its analysis in April 2008.
- Phase 2 (April 08 to Autumn 08) aims to refine policy options outlined in Phase 1 based on stakeholder feedback and further consumer research. It will set out more detailed options for PSB delivery in the future and invite responses from stakeholders.
- Phase 3 (Autumn 08 to Spring 09), Ofcom will publish a final statement in early 2009 which will include a summary of consultation responses and report any new findings.

Phase 1 audience researchⁱⁱⁱ identified that the general public value public service broadcasting being delivered by more than one provider. This report forms part of Phase 2 of the Review and aims to assess in more specific terms the value the general public places on plural supply of public service programming.

ⁱ Ofcom carried out its first PSB Review in 2004.

ⁱⁱ Terms of reference for use in this second stage of the PSB Review are available at: http://www.ofcom.org.uk/tv/psb_review/psb_2review/summary/

2.0 EXECUTIVE SUMMARY

2.1 Aims of the Research

This research set out to measure the general public's perception of the value of public service programming on ITV1, Channel 4 and Five, in addition to the BBC. The study adds to the existing body of work on willingness to pay for Public Service Broadcasting^{iv} (PSB) and most recently the BBC's own studies "Measuring the Value of the BBC" (2004) and "Public Service Broadcasting Now and in the Future" (2008) and the DCMS study "Willingness to Pay for the BBC During the Next Charter Period" (2006).

Holden Pearmain were commissioned by Ofcom to undertake a quantitative survey among 2,400 people across the UK. The study investigated how much people were willing to pay for public service programming on ITV1, Channel 4 and Five, in addition to paying the current licence fee for the BBC. It also incorporated a valuation of the BBC to provide a benchmark comparison for results, as well as a valuation of Public Service Broadcasting as a whole^v. Value was measured from a personal and citizen perspective. Half the sample were asked to consider value when thinking about themselves and their household, whereas the other half were asked to think about its value from the perspective of the good of UK society as a whole. The study then evaluated audiences' attitudes towards the acceptability of different mechanisms for funding PSB in the future.

The study had a number of inherent challenges; firstly of asking people to consider the value of public service programming on the commercial PSBs, which they may currently perceive to be freely provided by advertising-funded commercial organisations.

Second, the challenge of scope and scale inherent in evaluating two services with significantly different obligations and costs; public service programming on ITV1, Channel 4 and Five which currently costs the equivalent of £1.20 per household per month^{vi}, and all BBC channels and services costing £11.62 per household per month. It was therefore important for respondents to be given clear definitions of PSB, as

ⁱⁱⁱ See PSB Review Phase 1 annex 5: *The audience's view of public service broadcasting in the future*.

^{iv} *Willingness to pay for the BBC during the next charter period: A report prepared for the Department for Culture, Media and Sport (The Work Foundation, 2006)*
Barwise, Professor Patrick, The BBC licence fee bid: what does the public think? London: BBC Government Unit (2006)
Measuring the value of the BBC: a report by the BBC and Human Capital (2004)
Ehrenberg-Mills, The value of the BBC (London Business School, 1990)
Willingness to pay for viewing television (Radio-communications Agency/ DTI 2000)

^v This was defined as all BBC services and public service programming on ITV1, Channel 4 and Five

^{vi} This figure is calculated based on Ofcom estimates and broadcaster returns data for 2007/08 for spend on public service programming on ITV1, Channel 4 and Five. See Ofcom *PSB Review Phase 1: the digital opportunity*.

well as current broadcasters' obligations, funding mechanisms and the future challenges to the system as it stands. To ensure clear explanations were provided in the survey, we undertook a number of focus groups to explore various consumer propositions. We also undertook two quantitative pilots to test the questionnaires and refine the methodology.

The third challenge was that of asking respondents to think from a citizen perspective. Differentiation between consumer and citizen value is best gauged qualitatively in a deliberative process, where people are encouraged to step outside of themselves and think about the topic in terms of its value to society as a whole. In contrast, attempting to encourage people to think from a citizen perspective in a quantitative survey which does not allow for detailed explanations or reflection or debate can be challenging. To this end we split the sample in half and encouraged one half to think from the point of view of UK society as a whole throughout the survey, and the other half to think about themselves and their household. In addition, the question framing for the main exercise was designed to encourage the Citizen sample to think about the whole of society, and move beyond their own personal interests.

In developing our survey methodology, consideration was given to the techniques used in previous published studies. This study used a Gabor Granger methodology to measure the value people place on PSB on ITV1, Channel 4 and Five, in addition to the BBC, the same approach used by both the BBC and the DCMS to assess the value of the BBC. Consideration was also given to the respondent propositions used in previous studies and the question framing used was similar to that used in the BBC study (2004).

Our study employed a range of methodologies.

First, a top-down approach looking at the perceived value of Public Service Broadcasting provided by the BBC as a whole; ITV1, Channel 4 and Five public service programming; and finally, for corroboration, Public Service Broadcasting as a whole.

- To measure citizen value, a Gabor Granger technique was used, where half of the sample were asked to imagine there was a national vote on the future of the service in question. They were then given a choice of paying at the price presented or not paying at all, in which case the services would close and become unavailable to everyone in the UK
- To measure personal value half of the sample were asked to think about themselves and their family and their willingness to pay a voluntary monthly subscription. If they did not pay the subscription, they would no longer receive the services presented.
- A conjoint exercise was also used as a corroborative measure of personal value
- The survey also asked respondents about their attitudes toward delivery of PSB by channel

Second, a bottom-up approach was employed to measure the value of public service programming on ITV1, Channel 4 and Five, wherein respondents were asked about the personal or social importance of different public service genres on these channels.

2.2 Main Findings

Top Down Measures

Respondents were provided with an explanation of PSB obligations of each channel and asked to what extent they felt that each channel achieved its PSB aims as a whole. The BBC was seen as the most successful in delivering PSB obligations (63% of respondents agreed), followed by Channel 4 (52%), ITV1 (47%), and Five (33%).

The study found that the general public value PSB on ITV1, Channel 4 and Five sufficiently to be prepared to pay for it from both a personal and a citizen perspective. This supports Ofcom's previous audience research findings^{vii} that people value plurality of PSB provision. 78% of respondents valued public service programming on ITV1, Channel 4 and Five sufficiently to be prepared to pay for it, in addition to the current licence fee for the BBC from a personal perspective; and 74% from a citizen perspective^{viii}. Results showed an average value of between £3.33 and £3.50 per month per household with no significant difference from a personal and citizen perspective^{ix} ^x. This compares with the estimated cost of providing PSB services on these channels currently of around £1.20 per month per household.

Analysis of responses by subgroup showed that from a citizen perspective people from socio-economic group AB were more likely to pay for public service programming on ITV1, Channel 4 and Five, at an average of £3.68 per month per household. Whereas from a personal perspective people whose most watched channel is ITV1 and people in analogue terrestrial only television households were more likely to pay (at £3.82 and £3.91 per month per household respectively).

As a benchmark comparison the study also measured the value the general public place on all BBC services. The study found that 82% of respondents were prepared to pay for the BBC from a citizen perspective and 81% from a personal perspective. The average values were £13.87 per month per

vii PSB Phase 1 – The Digital Opportunity

viii Proportions in each case are based on any respondent who answered 'very willing' or 'fairly willing' to at least one price point presented.

ix Mean results in each case exclude any respondent who consistently answered 'don't know' or 'very unwilling' throughout the exercise as they were deemed to not be taking part in the exercise.

x If audiences are willing to pay for public service programming, for personal as well as social reasons, this might suggest that commercial broadcasters should be able to fund this programming either by selling subscriptions or through advertising. However, there are several reasons why existing commercial broadcasting models might not support content that people say they are willing to pay for. Other kinds of content are more profitable than some kinds of public service programming. There is currently no model that allows viewers to subscribe to particular programmes within a linear schedule, such as regional news or children's programmes within the ITV1 schedule. And if this kind of content were monetised through subscription, its reach would likely be more limited than if it were available free to view, which would conflict with the wider goal of maximising the impact of public service programming.

household for citizen and £11.56 per month for personal perspective, the latter being in line with the current licence fee.

The study also included a conjoint exercise in order to provide an additional corroborative measure of respondents' willingness to pay for non-BBC PSB in addition to the licence fee from a personal perspective. Respondents were presented with a choice of three options for future Public Service Broadcasting services; one option was all BBC services at the current licence fee, and two options offered a combination of all BBC services with different public service programming on ITV1, Channel 4 and Five at different price points). The results from this exercise confirmed respondents' willingness to pay for public service programming on ITV1, Channel 4 and Five. Only 12% of respondents^{xi} consistently chose the BBC only option at the current licence fee. Respondents showed a high readiness to pay for ITV1/Channel 4/Five public service programming, with just under half (47%) choosing it at the highest level tested (£5). The average willingness to pay was £3.29 per month on top of the current licence fee. This figure is consistent with the Gabor Granger results.

Bottom Up Measure

The study incorporated a bottom-up valuation of public service programming on ITV1, Channel 4 and Five by genre. Respondents were asked to rank ITV1, Channel 4 and Five public service genres; thinking about themselves and their household in the Personal sample, and thinking about UK society as a whole in the Citizen sample. The Personal sample ranked ITV/Channel 4/Five news (mean score of 5.7^{xii}), ITV1/Channel 4/Five documentaries and factual programmes (5.5) and Channel 4 UK drama (5.4) as their lead three genres. By comparison the Citizen sample also ranked ITV1/Channel 4/Five news (6.6) as the most important genre, followed then by ITV1/Channel 4/Five current affairs (5.4), ITV1/Channel 4/Five documentaries and factual programmes (5.1) and ITV1 nations/regions news (5.0).

Funding Methods

The results of the Gabor Granger exercises indicate that over seven in ten people are prepared to pay for public service programming on ITV1, Channel 4 and Five. As a final exercise respondents were asked their views on possible future funding mechanisms for Public Service Broadcasting on ITV1, Channel 4 and Five. To provide a benchmark comparison, the study also asked respondents' views on funding mechanism for the BBC.

^{xi} These results are based on 82% of the sample. 18% were excluded as they did not either complete the task, or consistently chose the same all PSB option throughout (e.g. always the middle option) which was seen to indicate a lack of engagement in the task. However, those who chose the BBC-only option are included in the sample base, as this was a valid indication of preference.

^{xii} To calculate the mean scores, 1st ranked position was scored as 8 and last ranked position as 1.

The results showed that unsurprisingly the most popular funding options were ones which did not represent an immediate direct cost to the individual; an industry levy (a charge on advertisers or commercial broadcasters) emerged as the most acceptable method for funding of public service programming on ITV1, Channel 4 and Five (50% agree), as well as for the BBC (42% agree). This was followed by use of the current Licence Fee as it stands, but with some money allocated to ITV1, Channel 4 and Five (40%) and National Lottery money (39%), both with net positive acceptability. Somewhat more qualified acceptability was noted for direct public funding (money from local or central government from taxes), voluntary subscription (like Sky or cable) or funding by showing more advertising on ITV1, Channel 4 and Five than is currently allowed (with 31%, 30%, and 29% agreement respectively); the option of a higher Licence fee was seen as acceptable by just 16% of the sample, compared with 56% who saw this method as unacceptable.

These results indicate that although respondents are prepared to pay for PSB on ITV1, Channel 4 and Five, there is still a preference for funding sources which do not represent a perceived direct cost to the consumer.

3.0 INTRODUCTION

3.1 Structure of this report

An Executive Summary precedes this Introduction. There then follows a summary of the main findings from the research drawn from the main Gabor Granger and Conjoint exercises. The report also examines the results from the PSB achievement, genre ranking, and funding methods sections of the Personal and Citizen questionnaires.

3.2 Sample Design

The sample comprised of 2,474 people across the UK. The sample was split in two with Citizen and Personal questionnaires allocated randomly. The survey was run as two identical representative matched samples: for the Personal and Citizen surveys. The structure of the interview was identical in both samples except for the conjoint section incorporated in the Personal questionnaire and the question framing for the Gabor Granger and Genre Ranking exercises.

Both samples were set identical quotas in terms of:

- Region - with targets of 150 across each of 8 English government regions and 400 within each of the other nations (Scotland, Wales and Northern Ireland)
- Age, Sex, Socio Economic Group (SEG)
- Urban/Rural
- Working Status
- Type of television received on main TV set
 - Analogue terrestrial only
 - Free Multichannel (e.g. Freeview/Freesat)
 - Pay TV (e.g. Sky, Virgin)

For each of the eight English government regions, interviews were spread across a minimum of nine randomly drawn sample points per region; and similarly for each nation, Scotland, Wales and Northern Ireland, across a set of at least 25 points per nation. Points in each case were drawn at random within each region or nation, from a full list of all possible sample points, stratified by urban/rural morphology.

In terms of sample comparability, not only were Citizen and Personal samples closely matched demographically to be representative of the UK (both in terms of the quota controls set and achieved and also the subsequent weighting), but when compared in terms of their claimed TV access and viewing habits they were also well matched, with no significant differences emerging between the two samples in terms of TV platform, most watched channel or genres.

3.3 Weighting

Weighting was employed primarily to return regions and nations to their representative proportions within the UK population, after setting 150 target sample per English region and 400 in Scotland, Wales and Northern Ireland. In addition, weighting was also to ensure that TV platform was fully representative, within each nation, while making other demographics as fully representative at a regional or nation level.

Each sample was weighted separately in two stages, first by demographic and TV platform weights within each region or nation, and then by region/nation to bring each sample, Personal and Citizen, back to matched representative samples of the UK, both demographically and regionally.

Full details of the weighting matrices applied and the range of weights applied are shown in Appendix A.

3.4 Statistical Reliability

Only statistically significant differences between results within sample and between the Personal and Citizen samples are commented on in the report. All significance testing is conducted to the 95% level of confidence. In essence this means that there is a 95% chance that observed differences would be seen again if the study were repeated.

3.5 Development of the Methodology

This study faced a number of challenges in order to measure the value placed on public service programming on ITV1, Channel 4 and Five.

The General Public's Understanding of PSB

First, the study needed to make sure that the general public understand the current public broadcasting system, funding and statutory obligations. Ofcom's PSB Review Phase One deliberative research had already identified low levels of awareness of Public Service Broadcasting as a concept and in particular of the commercial PSB broadcasters' current obligations and funding. This study needed to ensure that respondents understood that ITV1, Channel 4 and Five have statutory public service obligations in exchange for a range of benefits, the main being gifted spectrum. This was critical in order to overcome the hurdle of asking people their willingness to pay for content that they currently may perceive to be provided for free by advertising-funded commercial channels. We also needed to ensure that respondents were thinking about the future and possible changes to provision and funding; the questionnaire therefore explored hypothecations about the future.

To this end we carried out exploratory focus group research to establish an effective way in which to explain the current PSB system, funding and statutory obligations of each channel, as well as how to encourage

respondents to think from a citizen perspective. Propositions were also refined based on feedback from the quantitative pilots, as well as external review of the pilot questionnaires.

Scale and Scope

The second challenge was one of scale and scope, as the study set out to evaluate two services with significantly different obligations and costs; namely specific public service programming on ITV1, Channel 4 and Five which currently cost the equivalent of £1.20 per household per month, and all BBC channels and services costing £11.62 per household per month.

The study also needed to ensure that respondents were a) not measuring the value of PSB on ITV1, Channel 4 and Five in isolation but were considering them in addition to paying the licence fee for all BBC services and b) considering specific public service programming on ITV1, Channel 4 and Five and not the channels in their entirety. To meet these challenges firstly respondents were reminded that they would be paying for public service programming on ITV1, Channel 4 and Five in addition to the licence fee for the BBC. Secondly a cross-check measure of asking people to evaluate all Public Service Broadcasting defined as 'All BBC services and public service programming on ITV1, Channel 4 and Five' was included. Finally respondents were given clear definitions of public service programming on ITV1, Channel 4 and Five and reminded of these during the course of the interview.

It was also seen as desirable to assess respondent views from both a personal and citizen perspective. Differentiation between consumer and citizen value is best gauged qualitatively in a deliberative process, whereby people are encouraged to step outside of themselves and think about the topic in terms of its value to society as a whole. Attempting to encourage people to think from a citizen perspective in a quantitative survey which does not allow for detailed explanations or reflection or debate can be challenging.

To this end we split the sample in half and encouraged one half to think from the point of view of UK society as a whole throughout the survey, and the other half to think about themselves and their household. In addition, the question framing for the Gabor Granger exercise was designed to encourage the Citizen sample to think about the whole of society by suggesting there would be a national vote and that if the respondent did not pay, then no one in the UK would receive the services presented; whereas in the Personal sample respondents were asked to imagine they could subscribe on a voluntary basis to this content, which they would not receive if they did not pay a monthly subscription.

Measurement

Another principal concern was the choice of technique to measure the value of public service programming on ITV1, Channel 4 and Five. The study needed to take account of the existing body of work on willingness

to pay for Public Service Broadcasting. Two previous studies^{xiii} both used the Gabor Granger method to measure the value of the BBC, though there were important differences between the two studies in the way these were presented, and the range of values they covered.

A review of the respondent phrasing and techniques used in previous studies was undertaken (see Figure 1 below) as well as a series of pilot studies to refine methodologies. The essential features of the previous studies and the approach selected here are summarised below.

Figure 1: Features of previous valuation studies vs approach selected for this study

	BBC (Human Capital)	DCMS (Work Foundation)	Ofcom (Holden Pearmain)	
Topic	BBC	BBC	BBC, ITV/C4/Five PSB, All PSB	
WTP method	Gabor-Granger	Gabor-Granger	Gabor-Granger	Choice-Based Conjoint
Highest price point tested	£60	£31	ITV/C4/Five PSB: £5.00 BBC £32.50 All PSB: £38.00	ITV/C4/Five PSB: ^{xiv} £5.00
Order of presentation of price points	Random	Descending sequential	Random	Random
Presentation of prices	Monthly	Monthly and annual	Monthly and annual	Monthly and annual
Scale	yes/no/ don't know	yes/no/ don't know	very willing/ fairly willing/ fairly unwilling/ very unwilling/ don't know	categorical choices between alternative PSB options and BBC only
Question frame	Personal context ('you', voluntary subscription) and Citizen context ('national vote'). Hypothecated in both instances	Personal context ('your household')	Personal context ('you'; voluntary subscription) and Citizen context ('Thinking about the good of UK society as a whole', 'national vote')	Personal context only – voluntary subscription
Information provided on current licence fee value	Value of licence fee not stated	Value of licence fee stated	Value of licence fee stated as £11.62 per month	Value of licence fee stated as £11.62 per month

In the Gabor Granger exercise in this study, a random approach for presenting price points was selected, as this avoided order bias.

Given this was a challenging area to grasp for respondents, it was felt important to attempt to measure their value via a variety of techniques in order to cross-check results. In addition to Gabor Granger

^{xiii} *Willingness to pay for the BBC during the next charter period: A report prepared for the Department for Culture, Media and Sport (The Work Foundation, 2006)*
Measuring the value of the BBC: a report by the BBC and Human Capital (2004)

^{xiv} *For ITV/C4/Five PSB only, in addition to a fixed base of BBC at the current licence fee of £11.62 per month per household*

measurements of willingness-to-pay, a conjoint exercise was introduced in the Personal sample to provide an additional measure of value for ITV1, Channel 4 and Five public service programming.

We also felt it was important to measure the value of public service programming on ITV1, Channel 4 and Five from a bottom-up perspective. In the final study conventional ranking questions were used to obtain general genre preferences for ITV1, Channel 4 and Five public service programming by genre. Given the difference in scale in PSB offering between the commercial Public Service Broadcasters and the BBC, it was decided not to incorporate a bottom-up BBC valuation within this exercise.

3.6 Questionnaire Coverage

Below we summarise the main features of the questionnaire relating to the presentation of PSB and the context in which respondents were asked to value it.

Explanation of Public Service Broadcasting	Public Service Broadcasting purposes and characteristics presented.	
Explanation of broadcaster obligations	<p>Respondents were informed that all BBC services are Public Service Broadcasting. ITV1, C4 and Five PSB obligations were described as:</p> <ul style="list-style-type: none"> ITV1, Channel 4 and Five all provide new high quality UK programmes: UK news, factual programmes and documentaries, and current affairs ITV1 and Five provides children's programming ITV1 provides nations/regions news and other programmes Channel 4 UK drama and comedy and experimental programming. Channel 4 is required to make and show new, distinctive, innovative and educational programming that is different from the other TV channels <p>Respondents informed that BBC is currently funded by the licence fee which costs £139.50 per year, £11.62 per month per household and told that the way in which BBC Services are provided in the future may need to change.</p>	
BBC valuation: Gabor Granger exercise	Personal Sample	Citizen Sample
	'Imagine yourself in a situation where you no longer have access to any of these BBC services and you no longer have to pay the current licence fee. In order for you and your household to be able to access these BBC services again, you would need to pay a voluntary monthly subscription. Thinking about you and your household, and thinking about all BBC programmes and services shown on the card, would you and your household be willing to pay as a voluntary monthly subscription ... '	'Thinking about the good of UK society as a whole, we are interested in your views on how much you and your household would be prepared to pay to keep all the BBC services. Imagine that there is a national vote on the future of the BBC. You have a choice of either paying for the BBC at the price presented to you; not paying the price and this means the BBC would close, all BBC programmes and services would stop for everyone in the UK and the licence fee would not be charged.
	Nine price points presented in random order from more than £32.50 to less than £7.50	
ITV1/Channel 4 and Five public service programming valuation: Gabor Granger exercise	Respondents informed that 'ITV1, Channel 4 and Five receive the right to broadcast at a discounted rate in return for showing Public Service Broadcasting programmes. To give you an idea of cost, the current investment is equivalent to spending £1.20 per household per month (£14.40 per year) on these Public Service Broadcasting programmes. The way in which these programmes and services are provided may need to change in the future as the current arrangement may no longer work.'	
	Personal Sample	Citizen Sample
	'Imagine yourself in a situation where you no longer have access to any of these programmes on ITV, Channel 4 and Five. In order for you and your household to be able to access these services on ITV, Channel 4 and Five again, you would need to pay a voluntary monthly subscription. Remember, without this new voluntary subscription, you would receive all the	'Thinking about the good of UK society as a whole, we are interested in your views on how much you and your household would be prepared to pay to keep Public Service Broadcasting programmes on ITV1, Channel 4 and Five. Imagine that there is a national vote on the future of the Public Service Broadcasting on ITV1, Channel 4 and Five. You have a

	BBC services at the current licence fee but none of the ITV, Channel 4 or Five programmes on the card.'	choice of two options. Please bear in mind that in each case you would still receive all the BBC services at the current licence fee.
	Respondents informed that BBC is currently funded by the licence fee which costs £139.50 per year, £11.62 per month per household and told that the way in which BBC Services are provided in the future may need to change.	
	Seven price points presented individually in random order from more than £5.00 per month to less than £1.20	

All Public Service Broadcasting valuation: Gabor Granger exercise	'Now I'd like you to think about all Public Service Broadcasting, taking into account everything you have previously thought about for Public Service Broadcasting from the BBC and ITV1, Channel 4 and FIVE. Currently the amount spent on Public Service Broadcasting is the licence fee at £11.62 per month (£139.50 per year) per household for the BBC and the equivalent of £1.20 per month per household (£14.40 per year) on ITV1, Channel 4 and FIVE. This represents about £13 per month per household (about £156 per year).'	
	Personal Sample	Citizen Sample
	'I'd like you to imagine yourself in a situation where you no longer have access to ANY of the BBC or ANY of these programmes on ITV1, Channel 4 and Five. You no longer pay the licence fee. In order for you and your household to be able to access these services on the BBC, ITV1, Channel 4 and Five again, you would need to pay a voluntary monthly subscription. Remember, without this new voluntary subscription, you would receive none of these programmes or services on the cards.'	'Thinking about the good of UK society as a whole, we are interested in your views on how much you and your household would be prepared to pay to keep all these public service programmes, channels and services. Imagine that there is a national vote on the future of the Public Service Broadcasting on the BBC, ITV1, Channel 4 and Five. You have a choice of either paying for all BBC programmes and services, and the Public Service Broadcasting programmes on ITV1, Channel 4 and Five at the price presented to you; not paying the price and this means the BBC would close, the licence fee would not be charged and all BBC services, and public service programmes on ITV1, Channel 4 and Five would stop for everyone in the UK.'
Bottom-up ranking exercise: ITV1, Channel 4 and Five public service genres	'Thinking about the types of TV programme you and your household like to watch I would like you to tell me how much you prefer each as viewers of television.' 'Please bear in mind this is in addition to all the BBC programmes and services you and your household have access to.'	'Thinking about the types of TV programme available I would like you to tell me how important each television programme type is to UK society as a whole. Please bear in mind this is in addition to all the BBC programmes and services you and your household have access to.'
ITV1, Channel 4 and Five valuation: choice based conjoint exercise	Respondents were asked to choose from 3 different options for Public Service Broadcasting provision. One option was the BBC at the current licence fee, the other two offered the BBC at the current licence fee together with different combinations of public service genres from ITV1, Channel 4 and Five PSB, at price points ranging from £1.20 to £5.00 per month.	n.a.
Attitudes towards funding mechanisms for future funding of PSB	'Thinking about the future, if the funding of Public Service Broadcasting on ITV1, Channel 4 and Five were to change, how acceptable do you feel each of the following methods of funding Public Service Broadcasting on ITV1, Channel 4 or FIVE would be?'	
	'Thinking about the future, if the funding of Public Service Broadcasting on the BBC were to change, how acceptable do you feel each of the following methods of funding Public Service Broadcasting on the BBC would be?'	

Both the Personal and Citizen propositions use wording that is similar to that used in the BBC's study *Measuring the value of the BBC* (2004)^{xv}. It also provides details on the current level of the licence fee as was the case in the DCMS own study^{xvi}.

^{xv} *Measuring the value of the BBC: a report by the BBC and Human Capital* (2004)

^{xvi} *Willingness to pay for the BBC during the next charter period: A report prepared for the Department for Culture, Media and Sport* (The Work Foundation, 2006)

The following sections examine the main findings from the research. In each section comment is also made on relevant subgroup differences, either between Citizen and Personal samples, where relevant or by demographic subgroup within each sample. Differences are only commented on where they achieve statistical significance at the 95% level of confidence.

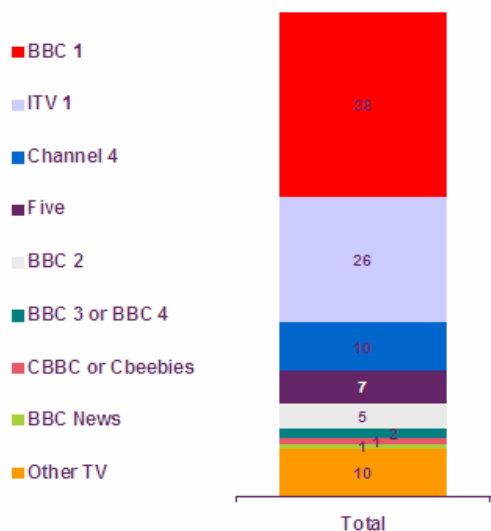
4.0 CONTEXT

Most Watched TV Channels and Genres

Most Watched TV Channels

By way of introduction respondents were asked which TV channel they personally watched most in an average week. The results are shown below in figure 2.

Figure 2: Most Watched Channel - % who name each channel as their most watched channel



QA7. Which TV channel do you personally watch the most in an average week?
Base: Total 2474, Citizen 1257, Personal 1217

The most watched channels that respondents named emerged as BBC One, watched most by almost two-fifths of the sample (38%) and ITV1 by just over one quarter (26%), followed then by Channel 4 (10%), Five (7%) and BBC Two (5%). (Citizen and Personal samples were very closely matched in this respect, with no significant differences observed between the two samples.). 'Other channels' included 4% who made any mention of Sky channels.

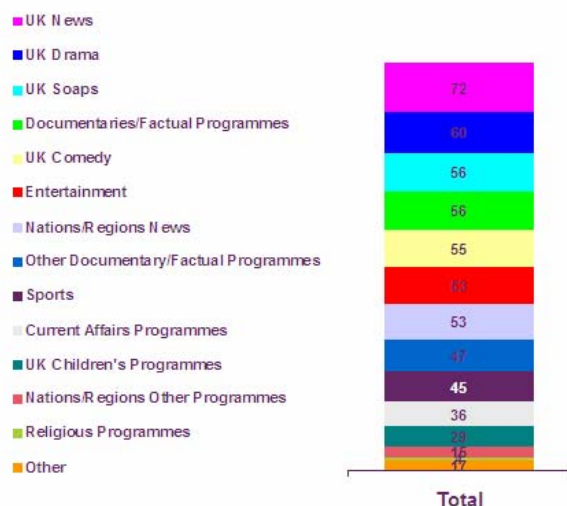
Some channels exhibited some variation by demographic sub-group. BBC One, for instance, was more likely to be named most watched channel among the 65 plus age group (43%) the ABC1 socio economic

group (43%), those with analogue terrestrial television only (44%) and among people in Wales (43%). While ITV1 tended to be named most watched channel more by the DE socio economic group (31%) and again among those with analogue television only (32%) and people in Wales (30%). Channel 4 was more likely to be named as most watched channel by the 18-24s (20%) and among people in Northern Ireland (16%). Five tended to be named by the C1 socio economic group (19%) and those with Pay TV (13%); and BBC Two by 18-24s (9%) and those receiving analogue only television (8%).

Regularly Watched TV Genres

To help understand the role of different genres respondents were asked which types of TV programmes they and their household watched regularly (i.e. a few times a week or more). The results are shown in Figure 3.

Figure 3: Regularly Watched TV Genres - % who name each genre



QA8. What kinds of programmes do you and your household watch regularly, that is a few times a week or more?
Base: Total 2474, Citizen 1257, Personal 1217

In this case respondents could give more than one answer, with UK news (72%), followed by UK drama (60%), UK soaps (56%), documentaries and factual programmes (56%), UK comedy (55%) and entertainment (53%), and nations/regions news (53%) all emerging with a majority of respondents claiming that they and their household view them regularly. These genres were followed by other documentaries and factual programmes (47%) and sports (45%). (Once again these patterns were closely matched between Citizen and Personal samples, with no significant differences observed between these two matched sub-samples.)

Some differences may be noted by demographic subgroup for the various genres that people named is listed below:

- UK news was more likely to be claimed to be watched among the 45 plus age group (78%) and ABC1 socio economic group (78%) and those without children in household (77%).
- UK drama was more likely to be claimed to be watched among the 65 plus age group (67%) but less in Scotland (56%).
- UK soaps more likely to be claimed to be watched among people in Wales (60%) and among the C2 socio economic group (66%).
- Documentaries and factual programmes about arts, science, nature and history were claimed to be watched more among 45-64s (63%), the AB socio economic group (63%) and those with no children in household (61%).
- UK comedy was claimed to be watched more among 18-24s (60%) and 25-33s (59%), but less among people in Scotland (48%).
- Entertainment was claimed to be watched more by 18-24s (56%) and people in pay TV households (57%).
- Nations or regions news was watched more among people in Scotland (60%) and among the 45-64s (59%), the 65 plus (67%), the C2 socio economic group (61%) and those without children in household (59%).
- Sports was watched more among the 65 plus (51%), the C1 socio economic group (54%) and those in pay TV households (50%).
- Current affairs programmes were watched more among people in Scotland (41%), among the 45 plus (39%) the AB socio economic group (42%) and those in free multi-channel households (40%).
- UK children's programmes were claimed to be viewed more among 15-24s (36%) and 25-44s (45%), and not surprisingly in households with children (61%).
- Other programmes about your nation or region were viewed more among people in Wales (19%) and Scotland (24%), among 45-64s (21%) and 65 plus (18%), among the AB socio economic group (19%) and those with no children in household (20%).

4.1 Extent to Which Channels Achieve PSB Aims

Introduction

Following a clear explanation of PSB and the specific PSB responsibilities for each channel, respondents were asked, in each case, to what extent they felt each channel achieved its PSB aims. Respondents were asked to respond using a ten point scale ranging from "Completely achieves these targets" scored as 10 to "Does not achieve these targets at all" scored as 1.

The descriptions given for each channel were as follows:

The BBC is required to provide a wide range of high quality, engaging, new programming and services made in the UK. Its programmes and services aim to:

- *help us to understanding what's going on in the world*
- *inform and educate*
- *reflect UK's cultural identity*
- *make us aware of different cultures and opinions within the UK.*

Its programmes and services are for all audiences, provided across all its TV channels (BBC One, BBC Two, BBC Three, BBC Four, CBeebies, CBBC, BBC News Channel (BBC News 24), BBC Parliament) and also BBC Radio services and the BBC's website and online services.

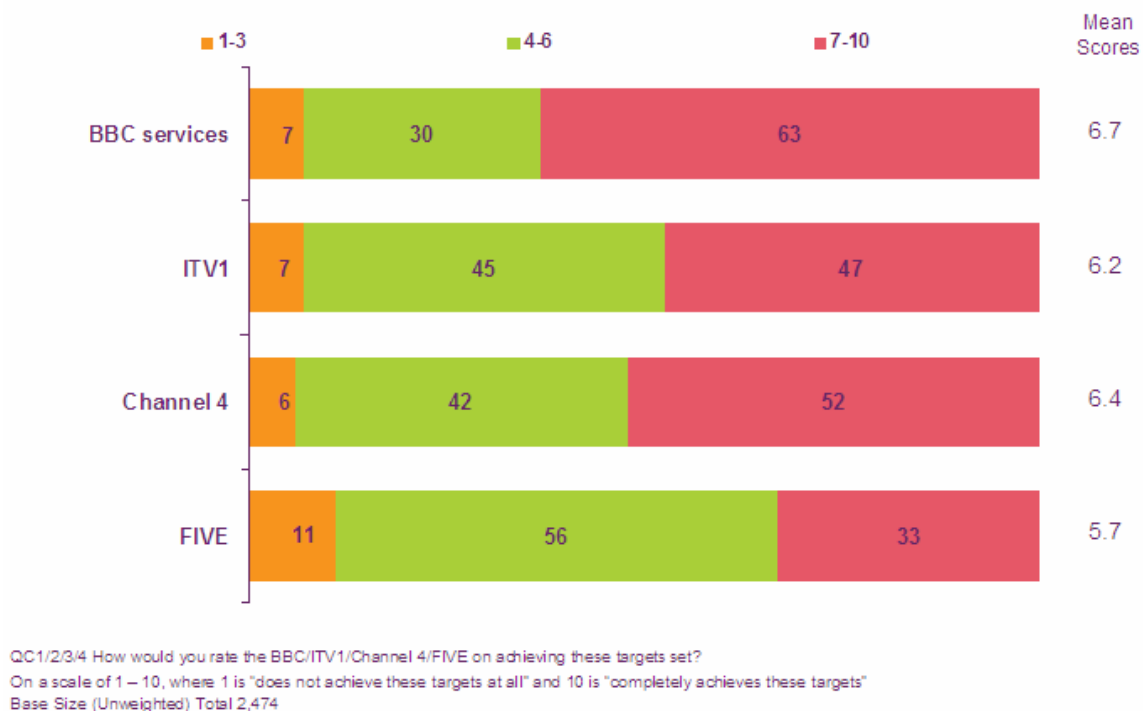
ITV1 is required to make and show new high quality programmes from in and around the UK, including UK news, current affairs, documentaries, factual programmes (e.g. about arts/science/history/nature), news about my region, other programmes about my region, as well as some children's programming.

Channel 4 is required to make and show new distinctive, innovative and educational programming that is different from the other TV channels, including high quality UK news, current affairs, documentaries, factual programmes (e.g. about arts/science/nature/history), UK drama and comedy and experimental programming.

Five is required to make and show new high quality UK news, current affairs, documentaries, factual programmes (e.g. about arts/science/nature/history) and children's programmes.

Perceived achievement of PSB aims by channel

Figure 4 shows that the BBC was seen as the most successful in achieving its aims as a PSB broadcaster, with over three-fifths of respondents (63%) believing that the BBC achieves its targets (i.e. giving scores from 7 to 10 on the scale). This is significantly higher than seen for the other channels.

Figure 4: Perceived PSB Achievement by Channel - %

There was less difference in perceived PSB achievement between Channel 4 and ITV1, but Channel 4 does achieve a slightly higher mean score (6.4 vs 6.2.), with just over half of respondents (52%) believing Channel 4 achieves its PSB aims, compared with 47% for ITV1. In contrast, one third of all respondents (33%) believed that Five achieved its PSB aims.

There were some significant variations in these findings by subgroup and these are summarised below:

BBC Services

Agreement that the BBC achieves its targets was strongest in England and Wales (mean score of 6.8), among those in the ABC1 socio economic group (6.9), among free multichannel or pay TV households (6.9 and 6.7 respectively) and also among those for whom BBC1 was their most viewed channel (7.0).

Channel 4

For Channel 4 agreement that it achieves its targets was greater among 18-24s and 25-44s (mean score of 6.9 and 6.6 respectively), the C1 SEG group (6.6), among free multichannel households (6.5) and especially among those who named Channel 4 as their most watched channel (7.5).

ITV1

Agreement that ITV1 achieves its targets was greater among those with children in household (mean score of 6.4), among free multichannel or pay TV households (6.3 in each case) and for those who said they viewed ITV1 most often (6.9), but less so among the AB socio economic group (6.0).

Five

While for Five, agreement that it achieves its targets was higher among the C2 socio economic group (5.9 mean score), among free multichannel households (5.8) and, most notably, among those who said they watched Five most often (7.3).

5.0 AUDIENCES VALUATION OF PUBLIC SERVICE BROADCASTING (GABOR GRANGER EXERCISE)

5.1 Introduction

A key aim of the survey was to understand the value that the general public place on Public Service Broadcasting on ITV1, Channel 4 and Five, in addition to the BBC. To help understand this issue a willingness to pay Gabor Granger exercise was used.

Gabor Granger is a widely used method in market research for measuring consumers' willingness to pay for goods and services. It involves showing respondents a series of prices and asking them whether they would purchase those goods or services at that price. Compared to other methods, Gabor Granger is simple to administer and the analysis is straightforward, requiring the use of percentage responses to plot the price-demand curve, rather than advanced statistical estimation. It can be presented to respondents in a number of ways: after extensive pilot testing we chose to randomise the order of prices for each respondent to avoid any systematic bias.

Critics of the Gabor granger suggest that it over-emphasises the role of price when the marketing mix is complex. However, in areas where consumers are not used to being asked to indicate a willingness to pay, such as Public Service Broadcasting on ITV1, Channel 4 and Five, the purpose is to focus on price and Gabor Granger is the method most easily understood by respondents. It also has the advantage of having been used in comparable studies^{xvii}.

In this survey, each respondent took part in three Gabor Granger exercises. The first related to willingness to pay for all BBC programmes and services in order to provide a benchmark comparison, the second for public service programming on ITV1, Channel 4 and Five in addition to the licence fee paid for the BBC. Finally we asked respondents to value 'all Public Service Broadcasting' defined as all BBC services and public service programming on ITV1, Channel 4 and Five. This was carried out as a corroborative measure for valuing public service programming on ITV1, Channel 4 and Five in addition the BBC, rather than a finding in its own right.

^{xvii} *Willingness to pay for the BBC during the next charter period: A report prepared for the Department for Culture, Media and Sport (The Work Foundation, 2006)*
Measuring the value of the BBC: a report by the BBC and Human Capital (2004)

In the Gabor Granger exercise, respondents were asked if they were willing to pay for the service described at the price presented. They answered using the following scale: 1 - Yes, very willing, 2 - Yes, fairly willing, 3 - No, fairly unwilling, 4 - No, very unwilling, 5 - Don't know

Each respondent was asked about all price points within the exercise, and the order of presentation was randomised in each case. The main reason why a random approach was used is that it reduces the influence of the first price point, which may affect further choices. Respondents usually don't know how many price points they will be asked, nor what those price points are. The first price point asked can be over (or under) represented in its appeal simply because it is first and if the price points are shown in ascending or descending order, respondents may feel obliged to maintain this over (or under) representation.

Respondents were not forced to answer in a logical fashion. For example, if they answered "Yes, very willing" to a particular price, they were still permitted to answer "No, fairly unwilling" at a lower price, as they might prefer to pay a higher price. Possible reasons why this could happen are:

- Concerns over the quality at a low price
- Budget constraints, they currently subscribe to a pay service, but when the licence fee gets over a certain price point they would be forced to cancel the pay service and only use Public Service Broadcasting.

Citizen and Personal Valuations

The sample was split in half, with one half asked to complete each valuation from a Citizen perspective and one half from a Personal perspective.

For those respondents that completed the questionnaire from the Citizen perspective, they were asked to think about how much they and their household would be willing to pay for each service presented when considering 'the good of UK society as a whole'. They were asked to do this by imagining that they were participating in a national vote about each of the elements of Public Service Broadcasting and they could either pay for the service at that price or it would shut down.

Those respondents that were asked to value Public Service Broadcasting from a personal viewpoint were told that these services existed, but they had to pay a voluntary monthly subscription to access them. If they chose not to pay the voluntary subscription they would not be able to access the services.

Price points tested

For each exercise, respondents stated how willing or unwilling they were to pay for each service at a specific price point. The price points that were tested for each exercise are set out in figure 5.

The price points for the BBC ranged from below the current licence fee up to more than £32.50; whereas for PSB on ITV1, Channel 4 and Five they started at less than £1.20 up to more than £5, and so incorporated the current estimated equivalent cost of this content of £1.20 per month per household.

The price points for the total Public Service Broadcasting exercise were designed to replicate the sum of the BBC price points plus the current amount spent on Public Service Broadcasting on ITV1, Channel 4 & Five which equates to £1.20 per month per household. Additional price points were then added in around the current licence fee to achieve greater granularity.

Figure 5: Monthly price points tested in the Gabor Granger exercises

BBC	ITV1, Channel 4 & Five Public Service Broadcasting	Total Public Service Broadcasting including all BBC and public service programming on ITV1, Channel 4 & Five
Less than £7.50	Less than £1.20	Less than £9.00
£7.50	£1.20	£9.00
£11.50	£2.00	£11.00
£16	£3.00	£13.00
£20	£4.00	£15.00
£24	£5.00	£17.50
£28.50	More than £5.00	£21.50
£32.50		£25.50
More than £32.50		£30.00
		£32.50
		£38.00
		More than £38.00

Calculation of Average Results

As respondents were only asked to state their intention at specific price points, the actual amount they are willing to pay is unknown; it can only be said that they are willing to pay somewhere between two price points, i.e. the highest point they agree to, compared with the next highest point they refuse to. To calculate an average value, it is necessary to place an estimated valuation on what respondents are actually willing to pay. To do this a mid price was used as this gives the most realistic estimate of what respondents are on average (mean) willing to pay. The mid point between the two price points is calculated and these two parts are multiplied together to calculate a weighted value. When these weighted values are summed together, this forms an overall valuation. The mid points used for each Gabor Granger exercise are outlined in figure 6.

Figure 6: Mid points used in the calculation of average monthly valuation for each Gabor Granger exercise

BBC		ITV1, Channel 4 & Five Public Service Broadcasting		'Total Public Service Broadcasting'	
Price point presented	Midpoint	Price point presented	Mid point	Price point presented	Midpoint
Less than £7.50	£3.75	Less than £1.20	£0.60	Less than £9.00	£4.50
£7.50	£9.50	£1.20	£1.60	£9.00	£10
£11.50	£13.75	£2.00	£2.50	£11.00	£12
£16	£18	£3.00	£3.50	£13.00	£14
£20	£22	£4.00	£4.50	£15.00	£16.25
£24	£26.25	£5.00	£5	£17.50	£19.50
£28.50	£30.50	Greater than £5.00	£5	£21.50	£23.50
£32.50	£32.50			£25.50	£27.75
Greater than £32.50	£32.50			£30.00	£31.25
				£32.50	£35.25
				£38.00	£38
				Greater than £38.00	£38

In each Gabor Granger mean result, the mean calculation excluded those respondents who *consistently* answered 'very unwilling' or 'don't know' or a combination of 'very unwilling' or 'don't know' at each price point presented as these respondents were deemed to not be participating in the exercise. The average calculation includes the mid point £ valuation for those who answered 'very willing' or 'fairly willing' at any price point presented and a value of £0 for those who answered 'fairly unwilling', 'very unwilling' or 'don't know'.

In addition for the 'Total Public Service Broadcasting' Gabor Granger exercise, respondents who *consistently* answered 'very unwilling' or 'don't know' or a combination of 'very unwilling' or 'don't know' at each price point presented in the exercise were excluded from the average calculation; and also anyone who had done the same for *either* the BBC or the ITV1, Channel 4 and Five exercise. This base was selected as respondents needed to demonstrate that they had taken part in the first two exercises, before being asked the final cross-check measure of willingness to pay for 'all Public Service Broadcasting'.

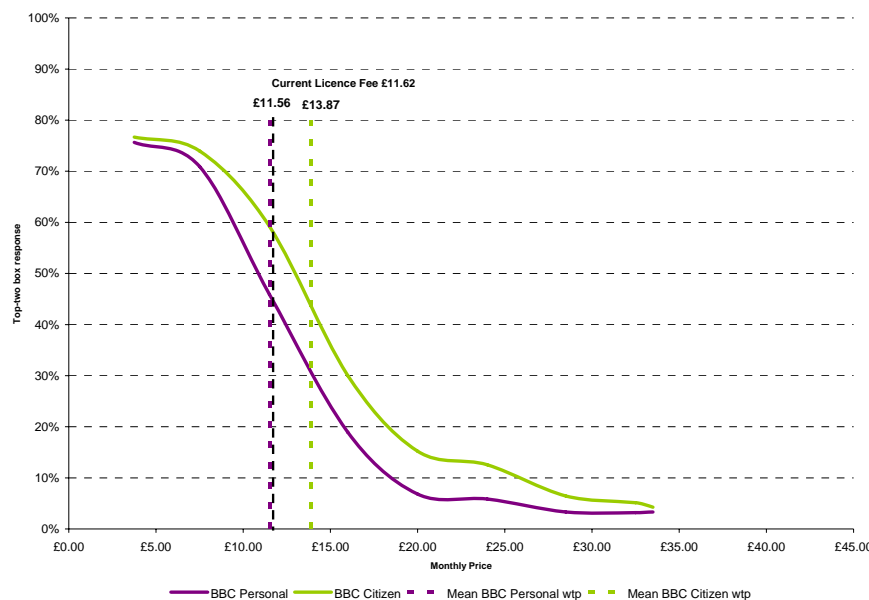
5.2 BBC Gabor Granger Exercise Results

First, respondents were asked to value the BBC, described as all BBC programming and services (see show card in Appendix C for full details of the definition presented to respondents). Respondents were also informed that BBC currently costs £139.50 per year or £11.62 per month per household and told that the way in which BBC Services are provided in the future may need to change.

Looking at the total sample, the proportion of respondents that are willing to pay for the BBC was identified. On the Gabor Granger scale this relates to respondents that answered either 'yes - very willing' or 'yes - fairly willing'; as respondents were asked about many price points, they had to give this answer to at least one price point to be classified as willing to pay for the BBC. **For the Citizen sample 82% of respondents said that they were willing to pay for the BBC and for the Personal sample this was 81%.**

Figure 7 shows the uptake at each price point as a proportion of the total sample. The uptake is defined as those respondents that stated that they were willing to pay (i.e. answered 'yes - very willing' or 'yes - fairly willing' at the price point presented.)

Figure 7: Uptake at each monthly price point for the Citizen and Personal Gabor Granger Exercises for the BBC



Base Size (Unweighted): Citizen 1257, Personal 1217.

Although 82% of the Citizen sample and 81% of the Personal sample are willing to pay for this service for at least one price level presented, this does not necessarily mean that they are willing to pay for this at the lowest price level tested. 5% of respondents for both the Citizen and Personal samples were willing to pay for the BBC, but not at the lowest price point. See the introduction to this section which outlines reasons why respondents may not always be willing to pay for services at a lower price.

Average monthly results

The respondents that *consistently* stated either that they did not know if they were prepared to pay anything or answered 'very unwilling' or a combination of the two at **all** price points were identified. This came to 10% for both the Citizen and Personal samples and these were removed from the average valuation exercise as they were deemed to not have taken part in the exercise. The average calculation includes the mid point £ valuation for those who answered 'very willing' or 'fairly willing' at any price point presented and a value of £0 for those who answered fairly unwilling, very unwilling or don't know.

From this exercise we can conclude that the **average value that respondents are willing to pay from a Citizen's perspective is £13.87 per month per household and from a Personal perspective is £11.56 per month per household**. The valuation for the Citizen perspective is statistically significantly higher than for the Personal one.

Subgroups: statistically significant differences for Citizen v. Personal Sample

All of the following subgroups valued the BBC from a Citizen perspective higher than from the Personal perspective. These were the 18-24, 25-44 and 45-64 age groups, as did those in the AB & C1 socio economic groups, respondents from England, those without children, respondents that named BBC1 or ITV1 as their most watched channel and those that have analogue terrestrial only or pay TV on their main TV set.

Subgroups: statistically significant differences within Citizen sample

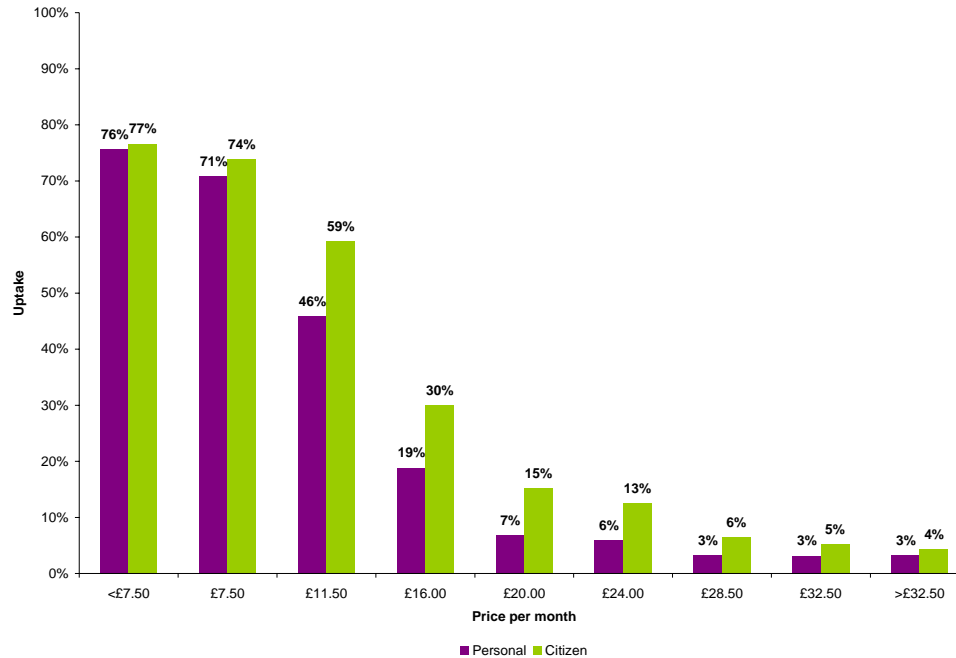
Those in the AB socio economic group were more likely to pay for BBC services from a Citizen perspective, with an average value of £16.39 per month per household.

Subgroups: statistically significant differences within Personal sample

There were no statistically significant differences when comparing the results from the subgroups with the overall sample.

Distribution by price point

It is also possible to look at the distribution around each of the price points tested. Figure 8 shows what proportion of the sample was willing to pay at each price point.

Figure 8: BBC Uptake at each price point tested, for overall sample

Base Size (Unweighted, Citizen 1257; Personal 1217)

Tests of significance were done to identify the groups that had higher or lower uptake at each price point compared with the average within sample. This is summarised in figure 9.

Figure 9: Statistically significant differences by subgroup by price point within sample: Citizen and Personal Gabor Granger Exercises for the BBC

Price point Top line denotes groups statistically significantly higher WTP than the overall average. Bottom line denotes groups statistically significantly lower WTP than the overall average.	Citizen	Personal
Less than £7.50 per month	SEG AB	-
	-	-
£7.50 per month	SEG AB	-
	SEG DE	-
£11.50 per month	SEG AB	Most watched TV channel is BBC1
	SEG DE, Citizens of Wales, ITV1 channel most watched	-
£16 per month	SEG AB	SEG AB, Most watched TV channel is BBC1
	SEG C2	SEG DE, Most watched TV channel is ITV1, Those with analogue terrestrial television only
£20 per month	SEG AB	SEG AB
	SEG C2	Those with analogue terrestrial television only
£24 per month	SEG AB	-
	SEG C2, ITV1 channel most watched	Most watched TV channel is ITV1, Those with analogue terrestrial television only
£28.50 per month	18 – 24 year olds	-
	65+ year olds	-
£32.50 per month	-	Those in households with no children
	65+ year olds	-
Greater than £32.50 per month	18 – 24 year olds, Freeview TV Service	-
	Pay TV Service	Those in households with no children

SEG refers to socio economic group.

5.3 ITV1, Channel 4 and Five Public Service Broadcasting Gabor Granger Results

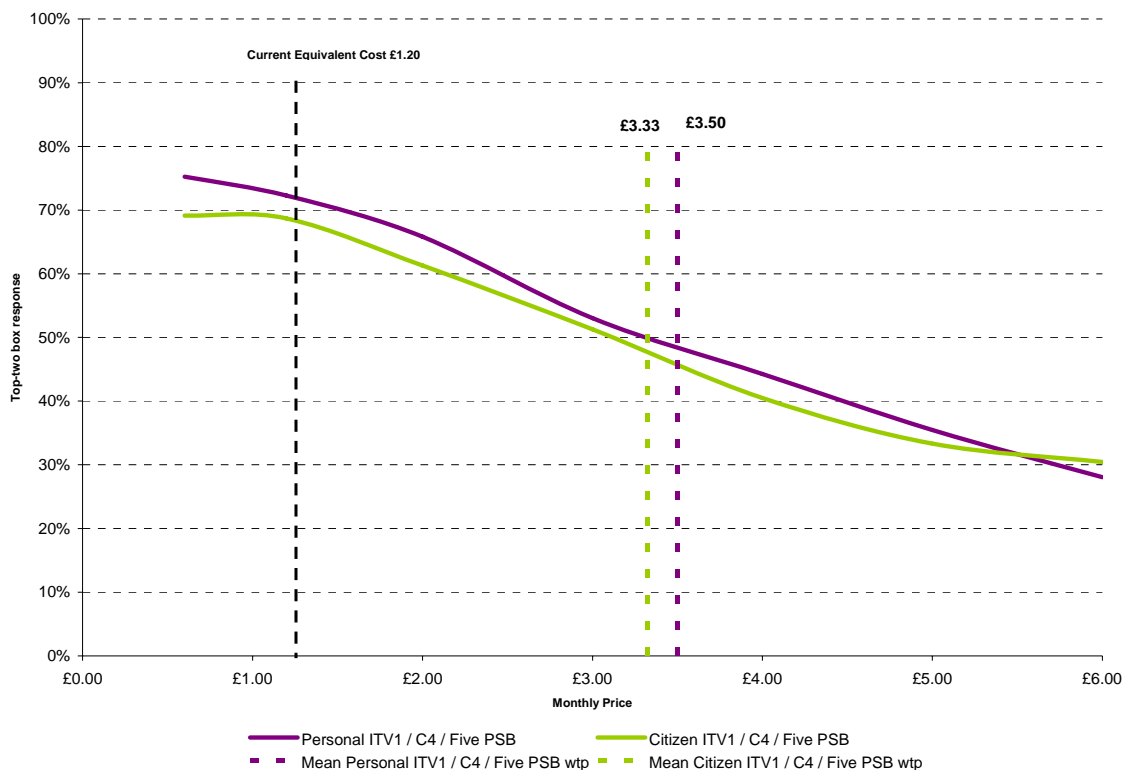
The second Gabor Granger exercise measured the value that the general public place on public service programming on ITV1, Channel 4 and Five. Respondents were given a show card (see Appendix C) which specified public service programming on ITV1, Channel 4 & Five by genre. Respondents were also informed that ITV1, Channel 4 and Five receive the right to broadcast at a discounted rate^{xviii} in return for showing Public Service Broadcasting programmes and that current investment was equivalent to spending £1.20 per household per month (£14.40 per year) on these Public Service Broadcasting programmes. The way in which these programmes and services are provided may need to change in the future as the current arrangement may no longer work. They were also asked to undertake the exercise, bearing in mind that they would continue to pay the current licence fee for all BBC services.

Looking at the total sample, the proportion of respondents that are willing to pay for ITV1, Channel 4 & Five Public Service Broadcasting was identified. On the Gabor Granger scale, this relates to respondents that answered either 'yes - very willing' or 'yes - fairly willing'. As respondents are asked about many price points, they had to give this answer to at least one price point to be classified as willing to pay. **For the Citizen sample, 74% of respondents said that they were willing to pay for ITV1, Channel 4 and Five Public Service Broadcasting and for the Personal sample, this was 78%.**

Figure 10 shows the uptake at each price point as a proportion of the total sample. The uptake is defined as those respondents that stated that they were willing to pay.

^{xviii} This phrase was developed as a result of preliminary focus groups. The term gifted spectrum was explained to participants who were then asked to express it in their own words.

Figure 10: Uptake at each monthly price point for the Citizen and Personal Gabor Granger exercises for ITV1, Channel 4 and Five Public Service Broadcasting



Base Size (Unweighted): Citizen 1257, Personal 1217.

Although 74% of the Citizen sample and 78% of the Personal sample are willing to pay for this service at a price level, this does not necessarily mean that they are willing to pay for this at the lowest price level tested.. 5% of respondents were willing to pay, but were not willing to do so at the lowest price level for the Citizen exercise and 3% of Personal respondents reacted in the same way. See the introduction to this section which outlines reasons why respondents may not always be willing to pay for services at a lower price.

Average monthly results

The respondents that stated either that they did not know if they were prepared to pay anything or answered 'no - very unwilling' or a combination of the two at all price points were identified. This came to 18% for the Citizen and 17% of the Personal sample. These respondents were removed from the average monthly valuation calculation as they were deemed to not be taking part in the exercise. The average calculation includes the mid point £ valuation for those who answered 'yes - very willing' or 'yes - fairly willing' at any price point presented and a value of £0 for those who answered 'no - fairly unwilling', 'no - very unwilling' or 'don't know'.

The average value that respondents are willing to pay from a Citizen's perspective is £3.33 per month and from a Personal perspective is £3.50 per month (compared to an estimated cost of £1.20 per month per household to provide this content). These valuations are not statistically significantly different.

Subgroups: statistically significant differences for Citizen vs. Personal sample

Several groups were more likely to be prepared to pay from a Personal perspective than from a Citizen perspective. These were:

- 25-44 age group were prepared to pay £3.62 per month from a Personal perspective, and £3.24 from a Citizen perspective.
- Among those that named ITV1 as their most watched channel, respondents were prepared to pay £3.82 per month from a Personal perspective and £3.43 per month from a Citizen viewpoint.
- Those that do not access the internet from home were prepared to pay from a Personal perspective £3.44 per month and from a Citizen perspective £3.05 per month.

Subgroups: statistically significant differences within Citizen sample

Those respondents that are in the AB socio economic group were willing to pay a higher amount on average from a Citizen point of view for ITV1, Channel 4 and Five Public Service Broadcasting at £3.68 per month per household.

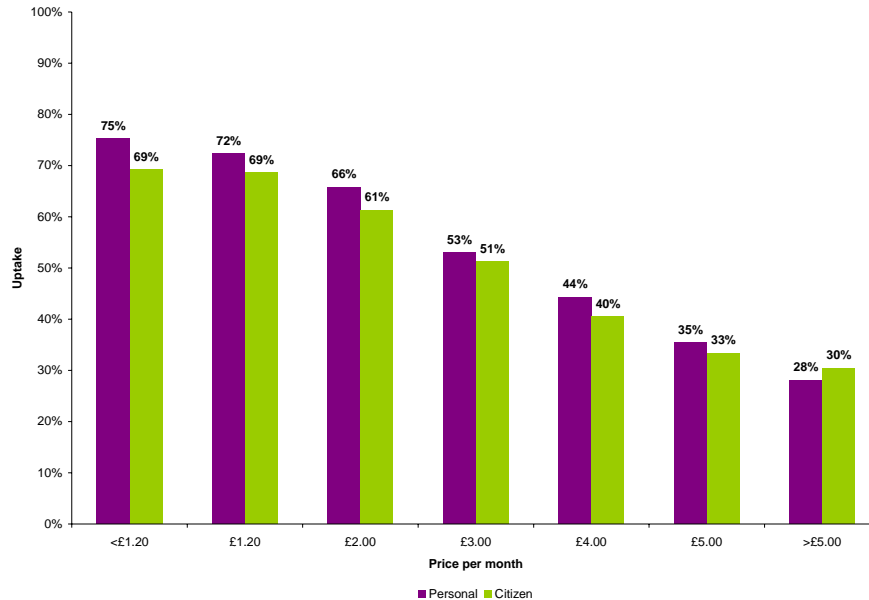
Subgroups: statistically significant differences within Personal sample

From a Personal point of view, those that named ITV1 as their most watched channel (£3.82 per month) along with those that have analogue terrestrial TV on their main TV set (£3.91 per month) were willing to pay more than the UK average.

Distribution by price point

Figure 11 shows the uptake at each price point tested.

Figure 11: Uptake for public service programming on ITV1, Channel 4 and Five at each monthly price point tested for overall sample



Base Size (Unweighted): Citizen 1257, Personal 1217.

Since around one third of the respondents are willing to pay more than £5 per month, it appears that the full distribution of what respondents are willing to pay may not have been fully captured. This may mean that, as higher price points were not tested, the willingness to pay for public service programming on ITV1, Channel 4 and Five may be a conservative estimate.

Tests of significance were done to identify the groups that had higher or lower uptake at each price point compared with the average. This is summarised in figure 12.

Figure 12: Differences by subgroup by price point within Citizen and within Personal samples: Gabor Granger Exercises for public service programming on ITV1, Channel 4 and Five

Price point Top line denotes groups statistically significantly higher WTP than the overall average. Bottom line denotes groups statistically significantly lower WTP than the overall average.	Citizen	Personal
Less than £1.20 per month	SEG AB	People living in Northern Ireland
	-	-
£1.20 per month	-	Those with analogue terrestrial TV only
	-	-
£2.00 per month	65+ year olds	Those who watch ITV1 most often, Those with analogue terrestrial TV only
		-
£3.00 per month	Those with analogue terrestrial TV only	Those who watch ITV1 most often, Those with analogue terrestrial TV only
	-	-
£4.00 per month	-	-
	Those that do not access the internet at home	-
£5.00 per month	-	SEG AB
	SEG C1	-
Greater than £5.00 per month	-	SEG AB
	-	-

SEG refers to socio economic group

5.4 All Public Service Broadcasting

In order to provide a cross-check measure for ITV1, Channel 4 and Five public service programming in addition to current licence fee for BBC, respondents were then asked to think about all Public Service Broadcasting. This was defined as all the BBC and public service programming on ITV1, Channel 4 and Five (see Appendix C for description given to respondents). Respondents were first of all reminded that they currently pay £11.62 per month for the BBC and that public service programming on ITV1, Channel 4 and Five costs the equivalent of £1.20 per household.

For the total sample, the proportion of respondents that are willing to pay for all Public Service Broadcasting (defined as all BBC, together with public service programming on ITV1, Channel 4 and Five) was identified. The proportion of respondents that stated that they were willing to pay for all Public Service Broadcasting was 74% from a Citizens' perspective and 72% from a Personal perspective in this Gabor Granger exercise^{xix}.

Average monthly results

The respondents that consistently stated either that they did not know if they were prepared to pay anything or answered 'no – very unwilling' at all price points for 'Total Public Service Broadcasting' or for either the BBC or ITV1, Channel 4 & Five exercise were identified. This came to 27% for the Citizen and 25% of the Personal sample. These respondents were removed from the base and the average monthly amount then calculated. The average calculation includes the mid point £ valuation for those who answered 'very willing' or 'fairly willing' at any price point presented and a value of £0 for those who answered 'fairly unwilling', 'very unwilling' or 'don't know'.

The results showed that from a Citizen perspective respondents were prepared to pay £14.07 per month and £12.66 from a Personal perspective. The difference between the Citizen perspective and the Personal perspective is not statistically significant at the overall level.

Subgroups: statistically significant differences for Citizen vs. Personal sample

The subgroups where there was a statistically significant difference between the valuation of the Citizen sample and the Personal sample are socio economic group C1 (Citizen: £15.28 per month, Personal: £12.26 per month) and those without children (Citizen: £14.70 per month, Personal: £12.36 per month).

^{xix} 7% of Citizen respondents and 6% of Personal respondents stated in the all Public Service Broadcasting Gabor Granger exercise that they were willing to pay (i.e. they had said 'very willing' or 'fairly willing' for at least one price point) but in either of the earlier BBC or ITV1, Channel 4 and Five Gabor Granger exercises they said that they were not willing to pay for these services at any price, i.e. they had said 'very unwilling' or 'don't know' to all price points. These respondents were therefore excluded from the calculation of the proportion willing to pay for all PSB.

Subgroups: statistically significant differences within Citizen & Personal Samples

Among all the subgroups tested there were no statistically significant differences between the subgroups and the overall sample for each of the Citizen and Personal samples.

Overview of All PSB results

The value from the BBC Gabor Granger exercise and the ITV1, Channel 4 and Five exercise give a combined value of $£13.87 + £3.33 = £17.20$ from a Citizen perspective, and $£11.56 + £3.50 = £15.06$ from a Personal perspective. These totals are higher than the £14.07 and £12.66 that respondents gave when asked to think about All PSB (defined as all BBC and public service programming on ITV1, Channel 4 and Five combined). A comparison of the combined totals and the all PSB results shows the difference is statistically significant. This difference could in part be explained by the complexity of the task that is involved for respondents in the final exercise for evaluating all PSB: they are being asked to think about a PSB hypothetical service. In addition there is a difference in scale between the ITV1, Channel 4 and Five valuation and the all PSB valuation due to the difference in price points evaluated.

A comparison with the results for all PSB from the conjoint exercise corroborates the Gabor Granger findings; this exercise showed that only 12% of respondents consistently chose the BBC only option; and on average respondents were prepared to pay **£14.91 in total for all PSB on a monthly basis**. There is no significant difference between this result of £14.91 and the sum of £15.06 for the BBC Gabor Granger and ITV1, Channel 4 and Five results from a Personal perspective.

Conclusions from the Gabor Granger Willingness to Pay Exercises

The research demonstrates that there is a strong willingness to pay^{xx} for Public Service Broadcasting: 82% of respondents from a Citizen perspective and 81% of respondents from a Personal perspective are willing to pay for the BBC. For Public Service Broadcasting on ITV1, Channel 4 & Five, 74% of respondents are willing to pay for this from a Citizen perspective and 78% from a Personal perspective. The average amount^{xxi} respondents are willing to pay is summarised in figure 13.

^{xx} The proportion of respondents willing to pay is defined as anyone who answers 'very willing' or 'fairly willing' for at least one price point presented in the exercise.

^{xxi} The average results exclude anyone who consistently answered 'don't know', or 'very unwilling' or a combination of the two to any price point presented.

Figure 13: Gabor Granger Exercise: Summary of average values

	Citizen Perspective	Personal Perspective
BBC	£13.87 per month	£11.56 per month
ITV1, Channel 4 & Five	£3.33 per month	£3.50 per month
BBC, ITV1, Channel 4 & Five	£14.07 per month	£12.66 per month

6.0 AUDIENCES PRIVATE VALUATION OF ITV1, CHANNEL 4 AND FIVE PUBLIC SERVICE PROGRAMMING (CONJOINT)

Introduction

The conjoint analysis formed part of the Personal questionnaire only and 1,217 respondents undertook the exercise. It set out to measure the relative appeal of different public service genre elements of ITV1, Channel 4 and Five and their relationship to respondents' willingness to pay for such services in addition to paying the current licence fee for the BBC. It was conducted in order to provide a corroborative measure for the Gabor Granger exercise on willingness to pay for public service programming on ITV1, Channel 4 and Five.

All products and services are made up of various elements or attributes. The purpose of a conjoint exercise is to measure the relative influence of each of these elements on consumers' choice of product or service. The key strength of a conjoint exercise is that it infers the value that consumers place on each element rather than asking them to give a direct valuation, and it does this by simply requiring them to choose their preferred product or service from a set of competing alternatives. Each respondent sees a number of such choice scenarios drawn from a larger number of scenarios constructed according to an experimental design. In the analysis this enables the researcher to construct a statistical model that quantifies the impact of each product or service element in the form of a 'utility' score.

The Conjoint Design

In this study three different service elements were tested

- Price
- Genre
- Channel

In each scenario, respondents were presented with three options:

1. BBC at current licence fee
2. BBC at current licence fee and a varying range of public service programming from ITV1, Channel 4 and Five
3. BBC at current licence fee and a different varying range of public service programming from ITV1, Channel 4 and Five

Respondents were asked simply to choose the option according to their own preferences. Below we show an example of one of the scenarios shown to respondents. Respondents were shown 9 scenarios in total.

Figure 14: Example of a Conjoint Scenario

Booklet 1 Scenario 5	Which of these options would you choose <u>for yourself</u> ?		
	Option 1 All BBC services (BBC One, BBC Two, BBC Three, BBC Four, CBeebies, CBBC, BBC News[24], BBC Parliament, BBC Radio, BBC online)	Option 2 All BBC services (BBC One, BBC Two, BBC Three, BBC Four, CBeebies, CBBC, BBC News[24], BBC Parliament, BBC Radio, BBC online)	Option 3 All BBC services (BBC One, BBC Two, BBC Three, BBC Four, CBeebies, CBBC, BBC News[24], BBC Parliament, BBC Radio, BBC online)
	ITV1 UK News ITV1 Current affairs ITV1 Regional news ITV1 Other regional programmes ITV1 Documentaries and factual programmes (arts, nature, history, science) ITV1 Children's programmes	ITV1 UK News ITV1 Current affairs ITV1 Regional news	
	Channel 4 UK News Channel 4 Current affairs Channel 4 Documentaries and factual (arts, nature, history, science) Channel 4 UK drama and comedy Channel 4 Experimental programming.	Channel 4 UK News Channel 4 Current affairs	
	Five UK News Five Current affairs Five Children's programmes Five Documentaries and factual (arts, nature, history, science)	Five UK News Five Current affairs	
Total PSB cost (licence fee (BBC) plus <u>voluntary charge</u>)	£16.62 per month (£199.50 annually)	£14.62 per month (£175.50 annually)	£11.62 per month (£139.50 annually)

The current licence fee is £139.50

In most cases the combined BBC and ITV1, Channel 4 and Five PSB options represented a reduced range of ITV1, Channel 4 and Five public service programming at various costs (i.e. reduced compared to the full range offered currently on television). However, each respondent also saw the current BBC and ITV1, Channel 4 and Five PSB services in at least one of the scenarios presented. Care was taken to ensure that the obviously more attractive versions of BBC plus ITV1, Channel 4 and Five PSB would be offered at a higher cost than the BBC plus reduced ITV1, Channel 4 and Five PSB. To minimise order effects, the position of the three options was varied across scenarios.

Each respondent saw one booklet of nine scenarios selected randomly from a set of eight booklets (72 scenarios in total). This number of scenarios ensured sufficient degrees of freedom relative to the number of parameters that would be estimated in the conjoint model, while the particular combinations of ITV1, Channel 4 and Five PSB genres ensured low correlations between them (all less than 0.15 except for the children's genre for Five, which had a correlation of 0.32, due to this genre being a specific feature of this channel.)

The purpose of the conjoint was to attain values for the following genres. (For full details on the conjoint attributes and levels tested see Appendix F.)

Figure 15: Summary of Genres and Channels Tested in the Conjoint

Genre			
UK News	ITV1 UK News	Channel 4 UK News	Five UK news
Current affairs	ITV1 Current affairs	Channel 4 Current affairs	Five Current affairs
Children's programmes	ITV1 Children's programmes	Five Children's programmes	
Documentaries and factual programmes	ITV1 Documentaries and factual programmes (arts, nature, history, science)	Channel 4 Documentaries and factual programmes (arts, nature, history, science)	Five Documentaries and factual programmes (arts, nature, history, science)
Regional news (ITV only)	ITV1 Regional news		
Other regional programmes (ITV only)	ITV1 Other regional programmes		
UK drama and comedy (C4 only)	Channel 4 UK drama and comedy		
Experimental programming (C4 only)	Channel 4 Experimental programming.		

The values for the different combinations for ITV1, Channel 4 and Five public service programmes presented ranged from £1.20 to £5, and in each case were presented *in combination* with all the BBC services at the current licence fee of £11.62. The choice was presented to respondents in terms of a combined monthly subscription ranging from £12.82 to £16.62.

Statistical Analysis

The conjoint analysis formed part of the Personal questionnaire only and 1,217 respondents undertook the exercise. Of these respondents, 225 (18%) were not included in the analysis as they either did not complete the tasks or consistently chose one option (e.g. always the middle option) which indicates a lack of engagement with the task. This gave an effective sample of 992. Note: those 12% of the effective sample who consistently chose the BBC-only option were included in the analysis as this was clearly a valid

expression of preference. With this data we constructed a multinomial logit model of choice behaviour - see appendix F for details on this element of the statistical analysis.

Conjoint Results: Overall Value of ITV1, Channel 4 and Five Public Service Programming

12% of the effective sample chose the BBC-only option at the current licence fee throughout the exercise, while the remainder chose a combination of BBC at the current licence fee plus ITV1, Channel 4 and Five PSB programming at least once in the exercise. This suggests that the majority of respondents support provision of public service broadcasting providers other than the BBC and are prepared to pay for it.

By multiplying the mid-point prices by the mid-point percentage shares of choice and taking the average, we calculate an average willingness-to-pay figure of **£3.29 per month per household** for ITV1, Channel 4 and Five public service programming^{xxii}. Mid points were used to ensure compatibility with the Gabor Granger exercise. **This equates to £14.91 per month for a combination of the BBC at the current licence fee and public service programming on ITV1, Channel 4 and Five.**

We were able to construct a simulator indicating the percentage take up of *all* ITV1, Channel 4 and Five PSB programming at each price point tested in the conjoint. These are summarised below:

Figure 16 Take up of all ITV1, Channel 4 and Five public service programming at Each Conjoint price point

Price Tested	Mid point used	Uptake of all ITV1, Channel 4 and Five PSB services
£3	£3.50	52%
£4	£4.50	51%
£5	£5	47%

Conjoint Results: Genre and Channel Values

Using the outputs from the conjoint model, it is possible to identify the relative appeal of each specific public service programming genre. This is established for each genre and the ranges are then re-based so that they sum to 100 and therefore represent weighted values. The results are shown below and indicate the relative appeal of each genre.

^{xxii} The average calculation was based on the effective sample size.

Figure 17: Standardised Genre Values from the Conjoint for Genres on ITV1, Channel 4 and Five

Genre	Standardised Genre Values
UK News	26
Current affairs	25
Documentaries and factual programmes	17
UK drama and comedy	14
Children's programmes	8
Regional news	6
Experimental programming	3
Other regional programmes	1

These results indicate that over half of the total value of the current ITV1, Channel 4 and Five PSB services is attributable to UK News and Current affairs programmes. This pattern of values was very similar across all demographic, socio economic and geographical groupings.

We were also able to infer from this information the relative value of channels, again by re-basing to sum to 100:

Figure 18: Standardised Channel Values from the Conjoint

Channel Value for PSB	Standardised Genre Values
ITV1	50
Channel 4	41
Five	9

ITV 1 has the highest value, followed by Channel 4 and then Five, much further behind.

7.0 BOTTOM UP VALUATION: GENRE RANKING

Introduction

This section of the research measures the relative preference for all of the different genre elements of ITV1, Channel 4 and Five PSB. This was undertaken in order to provide a bottom-up valuation of public service programming on these channels.

This was based on a two stage ranking procedure, starting with a sorting of genre cards into piles:

- In the Personal survey, respondents were asked to sort based on the types of programmes that *you and your household* like to watch more/feel neutral about/would be unlikely to watch
- In the Citizen survey respondents were asked to sort based on the types of programmes that you feel are more important/feel neutral about/are of little of no importance *to UK society as a whole*

Then, as a second stage, respondents ranked each pile in turn, to derive an overall ranking, again in the context of these alternative perspectives within each sample (Personal or Citizen).

The specific genres presented were as a set of shuffle cards were as follows:

- ITV1, Channel 4 and Five UK news
- ITV1, Channel 4 and Five current affairs
- ITV1 and Five children's programmes (Milkshake on Five)
- ITV1, Channel 4 and Five documentaries and factual programmes about arts/science/nature/history
- ITV1 news about my region (or nation in Scotland, Wales and Northern Ireland)
- ITV1 other programming about my region (or nation in Scotland, Wales and Northern Ireland)
- Channel 4 UK drama and comedy
- Channel 4 experimental programming

Respondents were asked in each case to consider the importance of each genre in the context of continuing to receive all BBC services.

Mean Genre Rankings – Personal versus Citizen

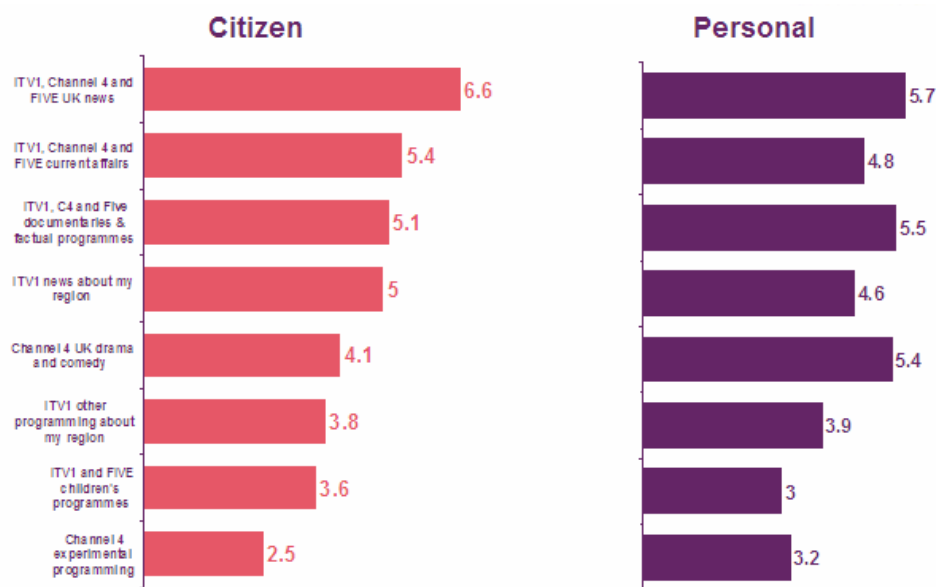
Genre rankings for Personal and Citizen samples can be compared in terms of mean rankings derived from each sample. In order to provide a readily understandable comparison, we have reversed the rankings scores to calculate the mean, i.e. if UK news ranked first it is given a score of 8, whereas if experimental programme is last it is given a score of 1.

Figure 19 shows the results.

In both the Personal and the Citizen samples UK news ranked number 1, although the mean score is significantly higher in the Citizen sample (6.6) compared to the Personal sample (5.7).

To summarise, the Personal sample saw ITV1, Channel 4 and Five news (5.7), ITV1, Channel 4 and Five documentaries and factual programmes (5.5) and Channel 4 UK drama (5.4) as their lead three genres, with Channel 4 experimental programming (3.2) and ITV1 and Five children's programming (3.0) seen as of generally lesser appeal. By comparison the Citizen sample saw ITV1, Channel 4 and Five news (6.6) as clearly most important genre by quite a large margin, followed then by ITV1, Channel 4 and Five current affairs (5.4), ITV1, Channel 4 and Five documentaries and factual programmes (5.1) and ITV1 news about my region (or nation in Scotland, Wales and Northern Ireland) (5.0), all seen as important, and with Channel 4 experimental programming seen as clearly least important (2.5).

Figure 19: Comparison of ITV1, Channel 4 and Five PSB Genre Rankings



Q62: Please rank the following types of TV programme in order of importance. On a scale of 1 to 8 where 8 is the Most Important
Base Size (Unweighted) Personal: 1217 Citizen: 1257.

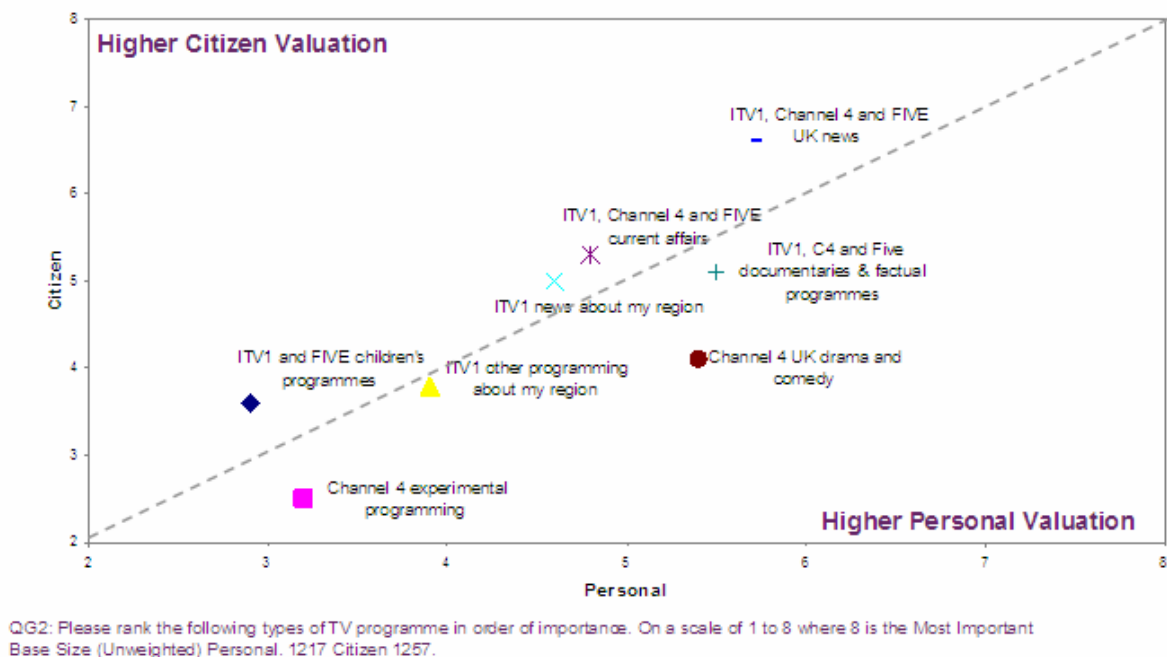
Differences between Personal and Citizen samples

These results show significant differences between Personal and Citizen samples in all cases, except for genre rankings for ‘other nations/regions programmes’ on ITV. Indeed, the greatest difference was seen in terms of higher rankings in relation to Channel 4 UK drama, which achieved a mean score of 5.4 and ranked fourth from a Personal perspective and scored 4.1 and ranked fifth from a Citizen perspective. There were also significant differences in terms of higher mean rankings in the Personal sample for Channel 4 experimental programming (3.2) and also for ITV1/Channel 4/ Five documentaries and factual programmes (5.5).

Meanwhile, the Citizen sample showed significantly higher mean genre rankings for ITV1, Channel 4 and Five news in particular (6.6), but also for ITV1, Channel 4 and Five current affairs (5.4), for ITV1 news about my region (or nation in Scotland, Wales and Northern Ireland) (5.0) and for ITV1 and Five children’s programmes (3.6).

These differences in emphasis between the two samples are clearly seen on the following chart, with greater distance from the diagonal best fit line revealing the greatest discrepancies between the two samples.

Figure 20: Comparison of Genre Rankings



The chart below summarises the order in which the genres are ranked based on mean scores.

Figure 21: Comparison of Genre Ranking exercises for ITV1, Channel 4 and Five public service programming - ranked on Citizen values

	Ranking Exercise Personal sample	Ranking Exercise Citizen sample
UK News	1	1
Current Affairs	4	2
Documentaries and factual programmes	2	3
Regional News (ITV1 Only)	5	4
UK drama and comedy (C4 only)	3	5
Other regional programmes (ITV1 only)	6	6
Children's programmes (ITV1 and Five)	8	7
Experimental programming (C4 only)	7	8

Ranked position of Genre from 1 – 8 where 1 is most important
 Base Size (Unweighted) Ranking Personal: 1217 Citizen 1257.
 Base Size (Unweighted): Conjoint (Personal) 992.

This next section highlights the key significant differences within sample by subgroup for each genre.

Subgroup Analysis – Personal Sample

ITV1, Channel 4 and Five UK news – 5.7 average

Here the main differences were higher rankings among the 65 plus (6.0) and those without children in household (5.9), but rather lower rankings for Scotland, Wales and Northern Ireland (5.5 in each case).

ITV1, Channel 4 and Five documentaries and factual programmes about arts/science/nature/history – 5.5 average

Here the main differences were higher rankings among 18-24s (5.8) and the AB SEG (5.7).

Channel 4 UK drama and comedy – 5.4 average

Here the main differences were higher rankings among the C1 and C2 SEG (5.6 and 5.7 respectively) and also in the London region (5.8)

ITV1, Channel 4 and Five current affairs – 4.8 average

Higher rankings were noted among those in free multi-channel households (5.0).

ITV1 news about my region (or nation in Scotland, Wales and Northern Ireland) – 4.6 average

Here the main differences were higher rankings in Scotland (5.1) and among the 65 plus (5.1). Interest in regional news was lowest in London (4.1).

ITV1 other programming about my region (or nation in Scotland, Wales and Northern Ireland) – 3.9 average

Again higher rankings were noted in Scotland (4.2), and also in Northern Ireland (4.4) and the North West (4.3), and again among the 65 plus (4.1). Interest in other regional programming was lower again in London (3.4), but also in the North East (3.4).

Channel 4 experimental programming – 3.2 average

Here the main differences were higher rankings among the AB SEG (3.5), the 18-24 and 25-44 age groups (3.3) and, most notably, in the London region (3.8).

ITV1 and Five children's programmes – 3.0 average

Higher rankings were noted among 18-24s (3.7) and 25-44s (3.6) and, not surprisingly, among those with children in household (4.8).

Subgroup Analysis – Citizen Sample

In the same way, this section highlights the key significant difference *within* sample for each genre, taken in the order of appeal they represented to the Citizen sample as a whole.

ITV1, Channel 4 and Five UK news – 6.6 average

Here the main differences were higher rankings among people in Wales (6.8) and the London region (6.8), and also among the AB SEG (6.8).

ITV1, Channel 4 and Five current affairs – 5.4 average

Higher rankings were noted among those in the AB and C1 SEG groups (5.7 and 5.6 respectively), and in free multi-channel households (5.6). Genre rankings were lower here for those in Scotland and Northern Ireland (5.0 and 5.1 respectively)

ITV1, Channel 4 and Five documentaries and factual programmes about arts/science/nature/history – 5.1 average

Here the main effects were higher rankings among 18-24's and the 65 plus (5.3 and 5.2 respectively) and also among those in analogue only households (5.2) or who watch BBC1 most (5.2).

ITV1 news about my region (or nation in Scotland, Wales and Northern Ireland) – 5.0 average

Here the main effects were higher rankings in Scotland (5.6) and among the 65 plus (5.3), the DE SEG group (5.4) and those without children in household (5.1).

Channel 4 UK drama and comedy – 4.1 average

Here the main effects were higher rankings among the C1 SEG group (4.5) and slightly depressed genre rankings in the nations, particularly Wales (3.7)

ITV1 other programming about my region (or nation in Scotland, Wales and Northern Ireland) – 3.8 average

As for regional news, higher rankings were noted in Scotland (4.2), but also for other regional programming, in Northern Ireland (4.1), and again among the 65 plus (4.2), the DE SEG group (4.0) and those without children in household (3.9).

ITV1 and Five children's programmes – 3.6 average

Higher rankings were noted in Wales (3.9), among 18-24s (3.8) and 25-44s (3.9), the C2 SEG group (3.8), those with pay TV via satellite or cable (3.8) and, again not surprisingly, among those with children in household (4.3).

Channel 4 experimental programming – 2.5 average

Higher rankings among the 18-24 age group (3.2)

8.0 FUTURE FUNDING FOR PUBLIC SERVICE BROADCASTING

Introduction

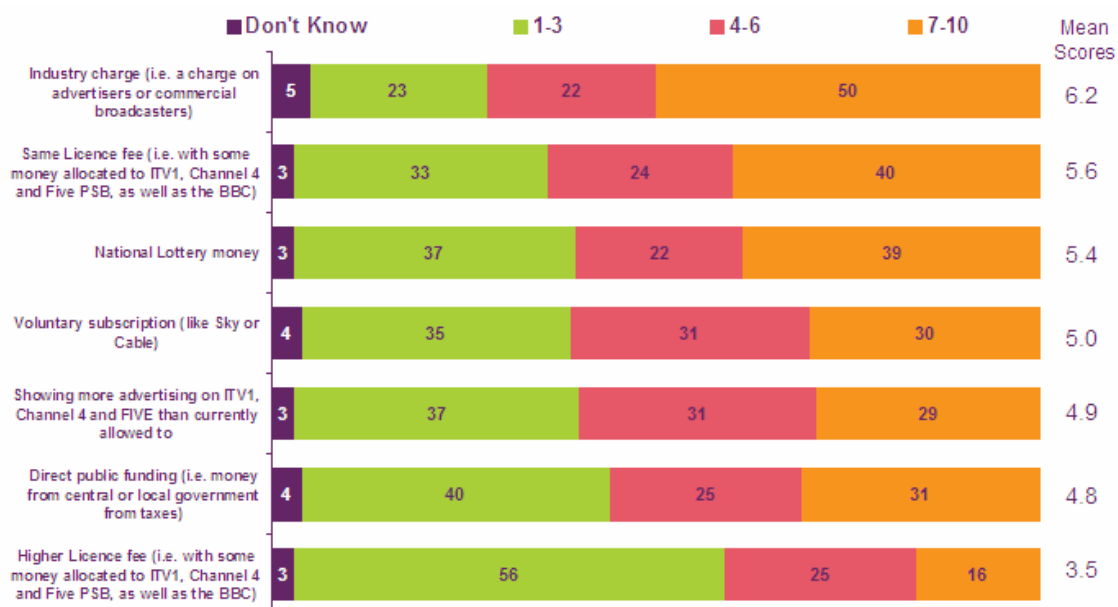
Respondents were also asked, if the funding of Public Sector Broadcasting was to change in the future, how acceptable they would find different funding methods. The question was identical for both Personal and Citizen samples and, hence, these results are examined for the total sample, first in terms of the PSB on ITV1, Channel 4 and Five, and then for the BBC. Respondents were asked about the BBC in order to provide a benchmark comparison for results for ITV1, Channel 4 and Five.

Acceptability of Future Funding Methods for ITV1, Channel 4 and Five

Among the general public the most acceptable method for funding PSB on ITV1, Channel 4 and Five emerged as an industry charge (i.e. a charge on advertisers or commercial broadcasters), with half of all respondents (50%) thinking this was an acceptable method (i.e. scoring 7-10 on a ten point scale from Totally Unacceptable scored as 1 to Totally Acceptable scored as 10).

This was followed, in terms of acceptability, by current Licence Fee but with some money allocated to ITV1, Channel 4 and Five (40%) and National Lottery money (39%), both with just net positive acceptability^{xxiii}.

Figure 22: Acceptability of Future Funding Methods for PSB on ITV1, Channel 4 and Five: Ranked on mean scores



QH1a/b/c/d/e: How acceptable do you feel each of the following methods of funding PSB on ITV1, Channel 4 and FIVE would be?
Base Size (Unweighted) Total 2,474

^{xxiii} Net results are calculated by subtracting results scoring 1, 2 or 3 out of 10 from results scoring 7, 8, 9 or 10 out of 10.

Somewhat more qualified acceptability was noted for direct public funding, i.e. money from local or central government from taxes (31%), voluntary subscription (30%) or funding by showing more advertising on ITV1, Channel 4 and Five than is currently allowed (29%); with the option of a higher Licence Fee seen as acceptable by just 16% of the sample, compared with 56% who saw this method as unacceptable (scored 1-3).

Comparisons by subgroup reveal some significant differences, summarised below for each funding method:

Industry charge (i.e. a charge on advertisers/broadcasters) – 6.2 average

Mean acceptability for an industry charge was higher among the AB and C1 SEG (6.5 and 6.3 respectively), those with no children in household (6.4) and those for whom BBC1 was not their most viewed channel (6.3), and generally lower in Scotland (5.9) and among the DE SEG (6.0).

Same Licence fee (i.e. with some money allocated to ITV1, Channel 4 and Five) – 5.6 average

Here acceptability was more marked among 18-24s and 25-34s (5.9 and 5.8 respectively), the ABC1 SEG (5.8), those with children in household (5.8) and those for whom BBC1 was not their most watched channel (5.8), and generally less so in Scotland (5.2) and among the C2DE SEG (5.3).

Higher Licence Fee (i.e. with some money allocated to ITV1, Channel 4 and Five) – 3.5 average

As with the current Licence Fee, acceptance of a higher Licence Fee, was also seen as more acceptable among 18-24s (4.1), the ABC1 SEG (3.8), but in this case also among those who received analogue channels only (3.9) and for whom BBC1 was their most watched channel (3.7), and again generally less so in Scotland (3.3) and among the C2DE SEG (3.2).

National Lottery money – 5.4 average

Acceptability was more marked again among 18-24s and 25-34s (5.9 and 5.7 respectively), those with children in household (5.6), but here also among the DE SEG group (5.5), and those with free multi-channel reception (5.7), and generally less so in Scotland (4.7) or among the 65 plus (4.9).

Voluntary subscription (like Sky or Cable) – 5.0 average

Mean acceptability for a voluntary subscription was higher among the AB SEG (5.5) and generally lower among the 65 plus (4.5), the C2 SEG (4.7), those with free multi-channel reception (5.0) and those for whom BBC1 was their most watched channel (4.8),

Showing more advertising on ITV1, Channel 4 and FIVE than currently allowed to – 4.9 average

The acceptability of more advertising was more marked among 18-24s (5.4), but generally less so in Scotland (4.7) among the 45 plus (4.9) and the AB SEG (4.6).

Acceptability was also just significantly higher among the Citizen (5.0) than the Personal sample (4.8).

Direct public funding (i.e. money from central or local government from taxes) – 4.8 average

Mean acceptability for direct public funding was higher among the AB SEG (5.1), those with no children in household (5.0) and those with free multi-channel reception (5.0), and generally lower in Scotland and Northern Ireland (4.5 and 4.4 respectively) and among the DE SEG (4.5).

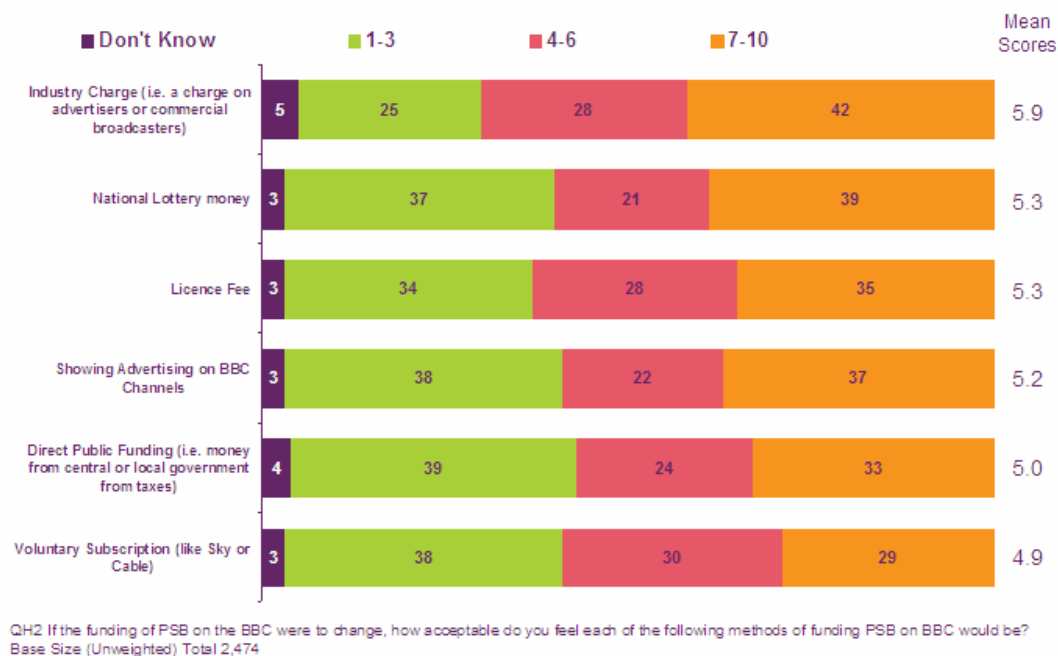
Acceptability was also somewhat higher among the Personal sample (4.9) than the Citizen sample (4.6).

Acceptability of future funding methods for the BBC^{xxiv}

Respondents were asked about the BBC in order to provide a benchmark comparison for results for ITV1, Channel 4 and Five. They were asked hypothetically how acceptable each method would be, if the way of funding the BBC were to change in the future.

As for PSB on ITV, Channel 4 and Five, the most popular method for the BBC was an industry charge (an option that may be perceived to not represent a direct cost to the respondent), with a mean score of 5.9. Licence Fee and National Lottery were joint second (5.3), followed by showing advertising on BBC channels (5.2), direct public funding (5.0) and voluntary subscription (4.9).

Figure 23: Acceptability of Future Funding Methods for BBC – Ranked on mean scores



^{xxiv} In the case of attitudes to funding for the BBC, differences were seen between Personal and Citizen samples for the Licence fee – see Appendix G for details.

Only voluntary subscription received more ratings as unacceptable, i.e. scoring it a 1, 2 or 3 out of 10 (38%) than acceptable, i.e. scoring it a 7, 8, 9 or 10 out of 10 (29%), and generated a just net negative mean score.

Comparisons by subgroup again reveal some significant differences, summarised below for each funding method in turn:

Industry Charge – 5.9 average

Mean acceptability for an industry charge was higher among 18-24s (6.3), DE SEG (6.1) and those for whom BBC1 was not their most viewed channel (6.1). Interestingly, this is the opposite SEG effect to that seen in relation to industry charges as a method for funding for ITV1, Channel 4 and Five, where industry charge was better received by ABC1s.

National Lottery Money – 5.3 average

Acceptability was more marked among 18-24s and 25-34s (6.0 and 5.5 respectively), those with children in household (5.6), and those with free multi-channel reception (5.6), and generally less so in Scotland (4.7) or among the 65 plus (4.9).

Showing Advertising on BBC Channels – 5.2 average

Acceptability of advertising on the BBC was more marked among 18-24s and 25-34s (5.7 and 5.3 respectively), the C2 and DE SEG groups (5.4 and 5.6 respectively) and in Wales (5.4), but also among those with analogue only reception (5.7), and those for whom BBC1 was not their most viewed channel; lower among those who did view BBC1 most (4.6) and the AB SEG (4.5)

Licence Fee – 5.3 average

Here acceptability was more marked among 18-24s (5.6), the AB and C1 SEG (6.0 and 5.6 respectively) and those for whom BBC1 was their most watched channel (5.7), and generally less so in Scotland (4.7) and among the C2DE SEG (4.9).

Acceptability was also somewhat higher among the Citizen sample (5.5) than the Personal sample (5.1).

Direct Public Funding – 5.0 average

Mean acceptability for direct public funding was higher among the AB SEG group (5.5), those with free multi-channel reception (5.3), and among those for whom BBC1 was their most viewed channel (5.2), but generally lower in Scotland and Northern Ireland (4.7 and 4.5 respectively) and among the DE SEG (4.5).

Acceptability was also just significantly higher among the Personal sample (5.1) than the Citizen sample (4.9).

Voluntary Subscription – 4.9 average

Mean acceptability for a voluntary subscription was higher among the AB SEG (5.1) and generally lower among the 65 plus (4.4), the C2 SEG (4.6), and also those for whom BBC1 was their most watched channel (4.5).

APPENDIX A – SAMPLE STRUCTURE AND WEIGHTING PROCESS

The survey was run as two identical samples: Citizen and Personal. The structure was identical except for the conjoint section and wording on questions in the Gabor Granger and Genre Ranking exercises.

Both samples were set identical quotas on:

- Region/Nation
- Age, Sex, Socio Economic Group
- Ethnicity
- Urban/Rural
- Working Status
- Type of Television received – Freeview/Freesat, Pay (Sky, Cable), Analogue Terrestrial

Each sample was weighted separately in two stages, by demographic within region and then by region.

Table 1: Target weights within Region for each demographic subgroup

	TOTAL	<24	25-44	45-64	65+	Male	Female	Wkng	Not wkng	AB	C1	C2	DE	Analogue	Free	Pay	Children	No Children
North East	12.69	9.5%	34.0%	32.7%	23.8%	48.6%	51.4%	60.3%	39.7%	19.6%	29.4%	16.7%	34.3%	13.4%	37.1%	49.5%	43%	57%
North West	11.29	10.8%	36.8%	31.5%	20.9%	48.4%	51.6%	60.3%	39.7%	19.9%	28.2%	15.3%	36.6%	13.4%	37.1%	49.5%	43%	57%
East Midlands	7.19	9.4%	36.4%	33.0%	21.1%	49.1%	50.9%	60.3%	39.7%	21.0%	28.0%	17.3%	33.7%	13.4%	37.1%	49.5%	43%	57%
West Midlands	8.89	11.0%	36.7%	31.5%	20.8%	48.9%	51.1%	60.3%	39.7%	19.9%	27.3%	16.5%	36.2%	13.4%	37.1%	49.5%	43%	57%
East of England	9.29	9.8%	36.7%	32.0%	21.5%	49.0%	51.0%	60.3%	39.7%	24.1%	30.5%	15.5%	29.9%	13.4%	37.1%	49.5%	43%	57%
London	12.39	12.5%	45.6%	25.8%	16.1%	48.4%	51.6%	60.3%	39.7%	26.5%	33.0%	11.0%	29.5%	13.4%	37.1%	49.5%	43%	57%
South East	13.59	9.6%	36.2%	32.1%	22.1%	48.6%	51.4%	60.3%	39.7%	26.9%	32.3%	13.8%	26.9%	13.4%	37.1%	49.5%	43%	57%
South West	8.49	8.7%	33.0%	33.4%	24.9%	48.6%	51.4%	60.3%	39.7%	20.9%	31.3%	16.8%	31.0%	13.4%	37.1%	49.5%	43%	57%
Scotland	8.39	11.1%	37.3%	31.2%	20.3%	48.1%	51.9%	60.3%	39.7%	19.0%	26.6%	14.6%	39.9%	17.7%	27.1%	55.2%	43%	57%
Wales	4.90	15.0%	32.8%	30.7%	21.4%	48.4%	51.6%	60.3%	39.7%	18.2%	28.8%	16.2%	36.7%	15.0%	29.0%	56.0%	43%	57%
Northern Ireland	2.90	18.1%	37.2%	27.6%	17.0%	48.7%	51.3%	60.3%	39.7%	16.9%	30.4%	20.8%	31.9%	24.5%	19.4%	56.1%	43%	57%
	100																	

Table 2: Targets for demographic subgroups for the whole sample

	TOTAL	<24	25-44	45-64	65+	Male	Female	Wkng	Not wkng	AB	C1	C2	DE	Analogue	Free	Pay	Children	No Children
North East	12.7	1.2%	4.3%	4.2%	3.0%	6.2%	6.5%	7.7%	5.0%	2.5%	3.7%	2.1%	4.4%	1.7%	4.7%	6.3%	5.5%	7.2%
North West	11.3	1.2%	4.2%	3.6%	2.4%	5.5%	5.8%	6.8%	4.5%	2.2%	3.2%	1.7%	4.1%	1.5%	4.2%	5.6%	4.9%	6.4%
East Midlands	7.2	0.7%	2.6%	2.4%	1.5%	3.5%	3.7%	4.3%	2.9%	1.5%	2.0%	1.2%	2.4%	1.0%	2.7%	3.6%	3.1%	4.1%
West Midlands	8.9	1.0%	3.3%	2.8%	1.9%	4.3%	4.5%	5.4%	3.5%	1.8%	2.4%	1.5%	3.2%	1.2%	3.3%	4.4%	3.8%	5.1%
East of England	7.2	0.9%	3.4%	3.0%	2.0%	4.6%	4.7%	5.6%	3.7%	2.2%	2.8%	1.4%	2.8%	1.2%	3.4%	4.6%	4.0%	5.3%
London	12.4	1.5%	5.6%	3.2%	2.0%	6.0%	6.4%	7.5%	4.9%	3.3%	4.1%	1.4%	3.7%	1.7%	4.6%	6.1%	5.3%	7.1%
South East	13.6	1.3%	4.9%	4.4%	3.0%	6.6%	7.0%	8.2%	5.4%	3.7%	4.4%	1.9%	3.7%	1.8%	5.0%	6.7%	5.8%	7.7%
South West	8.5	0.7%	2.8%	2.8%	2.1%	4.1%	4.4%	5.1%	3.4%	1.8%	2.7%	1.4%	2.6%	1.1%	3.2%	4.2%	3.7%	4.8%
Scotland	8.4	0.9%	3.1%	2.6%	1.7%	4.0%	4.4%	5.1%	3.3%	1.6%	2.2%	1.2%	3.3%	1.5%	2.3%	4.6%	3.6%	4.8%
Wales	4.9	0.7%	1.6%	1.5%	1.0%	2.4%	2.5%	3.0%	1.9%	0.9%	1.4%	0.8%	1.8%	0.7%	1.4%	2.7%	2.1%	2.8%
Northern Ireland	2.9	0.5%	1.1%	0.8%	0.5%	1.4%	1.5%	1.7%	1.1%	0.5%	0.9%	0.6%	0.9%	0.7%	0.6%	1.6%	1.2%	1.7%
	100				100		100		100				100			100		100

The weightings were completed in two stages. Stage 1 involved minor weighting within region and stage two the weighting between regions to return the sample to one representative of the UK as a whole.

APPENDIX B - PERSONAL QUESTIONNAIRE

Main questionnaire –Personal views

INTRODUCTION

READ OUT

Hello, my name is on behalf of Holden Pearmain, an independent market research agency. We are carrying out some research on Public Service Broadcasting and we would appreciate it if you could spend approximately 25 minutes answering some questions. The survey is on behalf of Ofcom – the communications regulator. Your opinion is very important to us; if you qualify, would you be able to take part?

If necessary: This is a genuine market research study and no sales calls will result from our contact to you. The answers you give will be held in strictest confidence; they will be made anonymous and presented to our client as statistics only.

The interview will be carried out in strict accordance with the Market Research Society's Code of Conduct.

IQ1 NOTE REGION

SINGLE CODE

England

- | | |
|---------------------|----------------------------|
| North East | 1 <input type="checkbox"/> |
| North West | 2 <input type="checkbox"/> |
| East Midlands | 3 <input type="checkbox"/> |
| West Midlands | 4 <input type="checkbox"/> |
| East | 5 <input type="checkbox"/> |
| London..... | 6 <input type="checkbox"/> |
| South East..... | 7 <input type="checkbox"/> |
| South West..... | 8 <input type="checkbox"/> |

Wales 9 ☐

Scotland..... 10 ☐

Northern Ireland 11 ☐

IQ2 Urban/Rural

SINGLE CODE

Urban 1 ☐

Rural 2 ☐

IQ3 Area of Deprivation

SINGLE CODE

Yes 1 ☐

No 2 ☐

IQ4 RECORD POSTCODE

SCREENERS

SQ1 How many TVs do you have in your household?

SINGLE CODE

None 1 Thank & Close ☐
 1 2 ☐
 2 3 ☐
 3 4 ☐
 4 or more 5 ☐

SQ2 Do you have a TV licence?

SINGLE CODE

Yes 1 ☐
 No 2 Thank & Close ☐
 Don't know 3 Thank & Close ☐

SQ3 Were you responsible for purchasing the licence?

SINGLE CODE

Yes, myself 1 ☐
 Yes, jointly 2 ☐
 No 3 ☐
 It was free 4 ☐
 It was free (aged 75 and over allowance) 5 ☐

SQ4 Which licence type do you have?

MULTICODE

Full colour TV Licence 1 ☐
 Full black and White TV Licence 2 ☐
 People aged 74 short term licence 3 ☐
 Aged 75 and over free licence 4 ☐
 Blind or Severely Sight Impaired Concession Licence 5 ☐
 Business with multiple sets Licence 6 ☐
 Hotels, Guest houses and campsites Licence 7 ☐
 ARC (Accommodation for Residential Care) Concessionary TV Licence 8 ☐
 Don't know 9 ☐

SQ5 Can you please tell me if you work in any of the following industries?

MULTICODE [READ OUT]

Marketing 1 Thank & Close ☐
 Market Research 2 Thank & Close ☐
 Journalism/media (TV, radio, newspaper, Magazine) 3 Thank & Close ☐
 Advertising 4 Thank & Close ☐
 None of these 5 ☐

QUOTA SHEET**QQ1 RECORD GENDER****SINGLE CODE**

Male 1 ☐
 Female 2 ☐

QQ2 Please tell me which of the following age groups you fall into:**SINGLE CODE [READ OUT]**

Under 18..... 1 Thank & Close ☐
 18-24..... 2 ☐
 25-34..... 3 ☐
 35-44..... 4 ☐
 45-54..... 5 ☐
 55-64..... 6 ☐
 65-74..... 7 ☐
 75 and over..... 8 ☐
 Refused..... 9 Thank & Close ☐

QQ3 Which is the occupation of the Chief Income Earner in your household? (That is the person with the largest income whether from employment, pension, state benefits, investments or any other source?)**SINGLE CODE – SHOW CARD 1**

Professional 1 (AB) ☐
 Senior Management..... 2 (AB) ☐
 Senior Civil Servant 3 (AB) ☐
 Middle Management 4 (AB) ☐
 Executive 5 (AB) ☐
 Local Government Officer..... 6 (AB) ☐
 Civil Service Officer 7 (AB) ☐
 Education 8 (AB) ☐
 Services/Military 9 (C1) ☐
 Junior Management 10 (C1) ☐
 Skilled manual..... 11 (C2) ☐
 Semi-skilled manual..... 12 (D) ☐
 Un-skilled manual 13 (D) ☐
 Apprentice 14 (D) ☐
 Unemployed (up to 6 months)..... 15 GO TO QQ4 ☐
 Unemployed (over 6 months)..... 16 (E) ☐
 Unable to work due to illness/disability (for up to 6 months) 17 GO TO QQ4 ☐
 Unable to work due to illness/disability (for over 6 months) 18 (E) ☐
 Retired (state pension) 19 (E) ☐
 Retired (private / occupational /earnings related pension) 20 GO TO QQ4 ☐
 Self employed 21 (B) ☐
 Other 22 Thank & Close ☐
 Don't know..... 23 Thank & Close ☐
 Refused 24 Thank & Close ☐

QQ4 Can you please tell me what the previous occupation of the Chief Income Earner in your household was?**SINGLE CODE – SHOW CARD 1**

- Professional 1 (AB) ☐
- Senior Management..... 2 (AB) ☐
- Senior Civil Servant 3 (AB) ☐
- Middle Management 4 (AB) ☐
- Executive 5 (AB) ☐
- Local Government Officer..... 6 (AB) ☐
- Civil Service Officer 7 (AB) ☐
- Education 8 (AB) ☐
- Services/Military 9 (C1) ☐
- Junior Management 10 (C1) ☐
- Skilled manual..... 11 (C2) ☐
- Semi-skilled manual..... 12 (D) ☐
- Un-skilled manual 13 (D) ☐
- Apprentice 14 (D) ☐
- Unemployed (up to 6 months) 15 (E) ☐
- Unemployed (over 6 months) 16 (E) ☐
- Unable to work due to illness/disability (for up to 6 months) 17 (E) ☐
- Unable to work due to illness/disability (for over 6 months) 18 (E) ☐
- Retired (state pension) 19 (E) ☐
- Retired (private / occupational /earnings related pension) 20 (E) ☐
- Self employed 21 (B) ☐
- Other 22 Thank & Close ☐
- Don't know..... 23 Thank & Close ☐
- Refused 24 Thank & Close ☐

QQ5 DO NOT ASK – RECORD SOCIAL CLASS USING MRS OCCUPATION CATEGORIES

- AB 1 ☐
- C1 2 ☐
- C2 3 ☐
- DE 4 ☐

QQ6 Are you:**SINGLE CODE [READ OUT]**

- Working full time (30 hours + per week) 1 ☐
- Working part time (8 to 29 hours a week) 2 ☐
- Working part time (less than 8 hours a week 3 ☐
- Not working..... 4 ☐
- At school/college/university..... 5 ☐
- Unemployed..... 6 ☐
- Retired 7 ☐
- Refused..... 8 Thank & Close ☐

QQ7 Which ITV1 region is your main TV tuned to (or watched most often)?

SINGLE CODE. PROMPT AND READ OUT IF NECESSARY

STV (formerly Grampian/STV)	1	<input type="checkbox"/>
Border	2	<input type="checkbox"/>
Tyne-Tees	3	<input type="checkbox"/>
Yorkshire	4	<input type="checkbox"/>
Granada	5	<input type="checkbox"/>
Anglia	6	<input type="checkbox"/>
Central	7	<input type="checkbox"/>
Meridian	8	<input type="checkbox"/>
London	9	<input type="checkbox"/>
ITV Wales	10	<input type="checkbox"/>
ITV West	11	<input type="checkbox"/>
West Country	12	<input type="checkbox"/>
UTV	13	<input type="checkbox"/>
Don't know	14	<input type="checkbox"/>

TV VIEWING HABITS**QA1 Who in your household watches TV?****MULTICODE**

Myself..... 1 ☐
 Partner 2 ☐
 Children 3 ☐
 Other adults 4 ☐

IF CODE 1 (MYSELF) NOT ANSWERED – THANK & CLOSE.

QA2 On an average day how many hours would you say you watch TV?**SINGLE CODE**

Up to 1 hour per day 1 ☐
 1-3 hours per day 2 ☐
 4-6 hours per day 3 ☐
 Over 6 hours a day 4 ☐
 Never watch TV 5 ☐
 Don't know 6 ☐

QA3 Which, if any, of these types of television does your household receive as its MAIN type of TV at the moment?**MULTICODE SHOWCARD 2**

Only the main TV channels (BBC One, BBC Two, ITV1, Channel 4, Five) 1 ☐ GOTO QA6
 Cable TV (through Virgin Media / NTL / Telewest) 2 ☐ GOTO QA5
 Satellite TV (Sky) 3 ☐ GOTO QA4
 Satellite TV (other) 4 ☐ GOTO QA4
 Freeview (through a set-top box or digital television set) ONLY with free channels 5 ☐ GOTO QA6
 Freeview (through a set-top box or digital television set) with free channels PLUS top-up channels such as Cartoon
 Network or the Discovery Channel 6 ☐ GOTO QA6
 Freesat 7 ☐ GOTO QA6
 Digital TV via a broadband DSL line (from HomeChoice, Tiscali or Kingston Communications) 8 ☐ GOTO QA6
 Other (please write in.....) 9 ☐ GOTO QA6
 Don't know 10 ☐ GOTO QA6

Ask if QA3=1**QA3i Are you able to receive any of the following channels on your MAIN TV set in your household?**

-
- | | | |
|-------------------------------------|----|--------------------------|
| BBC Three or BBC Four..... | 1 | <input type="checkbox"/> |
| BBC News Channel (BBC News 24)..... | 2 | <input type="checkbox"/> |
| CBBC or CBeebies | 3 | <input type="checkbox"/> |
| BBC Parliament..... | 4 | <input type="checkbox"/> |
| ITV2 | 5 | <input type="checkbox"/> |
| ITV3 | 6 | <input type="checkbox"/> |
| E4 | 7 | <input type="checkbox"/> |
| Sky One | 8 | <input type="checkbox"/> |
| Sky News | 9 | <input type="checkbox"/> |
| None of these..... | 10 | <input type="checkbox"/> |

Ask if QA3i = 1-9**QA3ii Please could you confirm which type of TV your household receives as its MAIN type of TV?**

-
- | | | | |
|---|----|--------------------------|----------|
| Only the main TV channels (BBC One, BBC Two, ITV1, Channel 4, Five) | 1 | <input type="checkbox"/> | GOTO QA6 |
| Cable TV (through Virgin Media / NTL / Telewest) | 2 | <input type="checkbox"/> | GOTO QA5 |
| Satellite TV (Sky)..... | 3 | <input type="checkbox"/> | GOTO QA4 |
| Satellite TV (other)..... | 4 | <input type="checkbox"/> | GOTO QA4 |
| Freeview (through a set-top box or digital television set) ONLY with free channels..... | 5 | <input type="checkbox"/> | GOTO QA6 |
| Freeview (through a set-top box or digital television set) with free channels PLUS top-up channels such as Cartoon Network or the Discovery Channel | 6 | <input type="checkbox"/> | GOTO QA6 |
| Freesat | 7 | <input type="checkbox"/> | GOTO QA6 |
| Digital TV via a broadband DSL line (from HomeChoice, Tiscali or Kingston Communications)..... | 8 | <input type="checkbox"/> | GOTO QA6 |
| Other (please write in.....) | 9 | <input type="checkbox"/> | GOTO QA6 |
| Don't know..... | 10 | <input type="checkbox"/> | GOTO QA6 |
-

Ask if QA3=3 or 4, or QA3ii= 3 or 4 (Satellite TV)

QA4 Do you use your satellite television service to receive subscription channels or free-to-air services only?**IF NECESSARY: Do you pay a monthly subscription fee on top of what you paid to have the dish installed?****SINGLE CODE**

- | | | |
|---|---|--------------------------|
| Receive subscription channels (pay a monthly subscription fee)..... | 1 | <input type="checkbox"/> |
| Free-to-air services only (no monthly subscription fee) | 2 | <input type="checkbox"/> |
| Don't know | 3 | <input type="checkbox"/> |
-

Ask if QA3=2, or QA3ii=2 (cable TV)

QA5 Do you use your cable television service to receive subscription channels or free-to-air services only?

IF NECESSARY: Do you pay a monthly subscription fee for your cable TV service?

SINGLE CODE

- Receive subscription channels (pay a monthly subscription fee)..... 1 ☐
Free-to-air services only (no monthly subscription fee) 2 ☐
Don't know 3 ☐
-

QA6 Which of these channels or services would you say you and your household watch/use regularly in an average week? That is a few times a week or more.

MULTICODE [READ OUT]

If answered 1 at QA3 and any of 7-10 at QA6 – need to recode QA3 from 1 to 5

- BBC One 1 ☐
BBC Two 2 ☐
ITV1 3 ☐
Channel 4 4 ☐
FIVE 5 ☐
BBC Three or BBC Four..... 6 ☐
BBC News Channel (BBC News 24)..... 7 ☐
CBBC or CBeebies 8 ☐
BBC Parliament..... 9 ☐
Other TV Channels 10 ☐
BBC Radio services 11 ☐
BBC.co.uk (BBC website) 12 ☐
BBC iplayer..... 13 ☐

INTERVIEWER NOTE: IF ASKED, PLEASE DESCRIBE BBC iplayer AS “BBC **iPlayer** is the service that lets you access BBC television programmes via your PC”.

QA7 Which TV channel do you personally watch the most in an average week?

SINGLE CODE [READ OUT]

- BBC One 1 ☐
BBC Two 2 ☐
ITV1 3 ☐
Channel 4 4 ☐
FIVE..... 5 ☐
BBC Three or BBC Four..... 6 ☐
BBC News Channel (BBC News 24)..... 7 ☐
CBBC or CBeebies 8 ☐
BBC Parliament..... 9 ☐
Other TV Channels (PLEASE SPECIFY) 10 ☐
-

QA8 What kinds of programmes do you and your household watch regularly, that is a few times a week or more?

MULTICODE [READ OUT]

- | | | |
|--|----|--------------------------|
| UK News | 1 | <input type="checkbox"/> |
| Current affairs programmes (e.g. Tonight with Trevor McDonald, Panorama, Dispatches) | 2 | <input type="checkbox"/> |
| News about my region (e.g. London Tonight, Midlands Today)..... | 3 | <input type="checkbox"/> |
| Aside from news, other programmes about my region for people in my region (e.g. Inside Out, The Way We Were, The Politics Show, Dales Diary) | 4 | <input type="checkbox"/> |
| UK children's programmes | 5 | <input type="checkbox"/> |
| Documentaries and factual programmes about arts/science/nature/history | 6 | <input type="checkbox"/> |
| Other factual programmes including hobbies, leisure and consumer affairs (e.g. Masterchef, Daily Cooks Challenge, and The Gadget Show) | 7 | <input type="checkbox"/> |
| UK soaps..... | 8 | <input type="checkbox"/> |
| UK drama..... | 9 | <input type="checkbox"/> |
| UK comedy..... | 10 | <input type="checkbox"/> |
| Sport | 11 | <input type="checkbox"/> |
| Entertainment (e.g. Strictly Come Dancing, X Factor) | 12 | <input type="checkbox"/> |
| Religious programmes | 13 | <input type="checkbox"/> |
| Other | 14 | <input type="checkbox"/> |
| None of these | 15 | <input type="checkbox"/> |
| Don't know..... | 16 | <input type="checkbox"/> |

Public Service Broadcasting

Some programmes on TV are provided for the good of UK society as a whole. They aim to:

- help us to understand what's going on in the world
- inform and educate
- reflect UK's cultural identity
- make us aware of different cultures and opinions within the UK.

These programmes are required to be high quality, engaging, new and made in the UK. This is called Public Service Broadcasting.

All BBC channels, programmes and services are Public Service Broadcasting.

INTERVIEWER: Hand **SHOWCARD 3** to respondent
This card shows BBC's programmes and services.

ITV1, Channel 4 and FIVE are also required to provide **some** Public Service Broadcasting programmes.

INTERVIEWER: Hand **SHOWCARD 4** to respondent

This card shows the types of Public Service Broadcasting programmes ITV1, Channel 4 and Five are required to provide.

I'd now like to ask you some questions about the BBC, ITV1, Channel 4 and Five and their public service broadcasting requirements.

THE BBC

QC1 The BBC is required to provide a wide range of high quality, engaging, new programming and services made in the UK. Its programmes and services aim to:

- help us to understanding what's going on in the world
- inform and educate
- reflect UK's cultural identity
- make us aware of different cultures and opinions within the UK.

Its programmes and services are for all audiences, provided across all its TV channels (BBC One, BBC Two, BBC Three, BBC Four, CBeebies, CBBC, BBC News Channel (BBC News 24), BBC Parliament) and also BBC Radio services and the BBC's website and online services

SINGLE CODE [SHOW CARD 5]

On a scale of 1 to 10, where 1 is "does not achieve these targets at all" and 10 is "completely achieves these targets" how would you rate the BBC on achieving these targets set?

Does not achieve these targets at all									Completely achieves these targets
1	2	3	4	5	6	7	8	9	10

ITV1, Channel 4 and FIVE

QC2 ITV1 is required to make and show new high quality programmes from in and around the UK, including UK news, current affairs, documentaries, factual programmes (e.g. about arts/science/history/nature), news about my region, other programmes about my region, as well as some children's programming.

SINGLE CODE [SHOW CARD 5]

On a scale of 1 to 10, where 1 is "does not achieve these targets at all" and 10 is "completely achieves these targets" how would you rate ITV1 on achieving these targets set?

Does not achieve these targets at all									Completely achieves these targets
1	2	3	4	5	6	7	8	9	10

QC3 Channel 4 is required to make and show new distinctive, innovative and educational programming that is different from the other TV channels, including high quality UK news, current affairs, documentaries, factual programmes (e.g. about arts/science/nature/history), UK drama and comedy and experimental programming.

SINGLE CODE [SHOW CARD 5]

On a scale of 1 to 10, where 1 is "does not achieve these targets at all" and 10 is "completely achieves these targets" how would you rate Channel 4 on achieving these targets set?

Does not achieve these targets as all									Completely achieves these targets
1	2	3	4	5	6	7	8	9	10

QC4 FIVE is required to make and show new high quality UK news, current affairs, documentaries, factual programmes (e.g. about arts/science/nature/history) and children's programmes.

SINGLE CODE [SHOW CARD 5]

On a scale of 1 to 10, where 1 is "does not achieve these targets at all" and 10 is "completely achieves these targets" how would you rate FIVE on achieving these targets set?

Does not achieve these targets at all									Completely achieves these targets
1	2	3	4	5	6	7	8	9	10

Gabor granger BBC personal

READ OUT

As you probably know, the BBC currently receives its money by charging an annual Licence fee, which must be paid by all households that have a television. At the moment this costs each household £11.62 per month (£139.50 per year).

Look at the card which shows the kind of programmes and services provided by the various parts of the BBC.

SHOWCARD 3

The way in which BBC Services are provided in the future may need to change .

We are interested in your views on how much you and your household would be prepared to pay to keep all the BBC programmes and services.

I'd like you to imagine yourself in a situation where you no longer have access to ANY of these BBC services AND you no longer have to pay the current Licence fee. In order for you and your household to be able to access these BBC services again, you would need to pay a voluntary monthly subscription.

Remember, without this new voluntary subscription, you would receive NONE of these BBC services on the card.

Also remember that if you wanted to access the digital or online BBC services on the card, you would still need to pay separately for a Digital TV box, a Digital Radio or an Internet connection (if you don't already have these).

I am going to ask you some different prices for this monthly subscription for the BBC.

For each price you can answer:

- Yes, very willing
- Yes, fairly willing
- No, fairly unwilling
- No, very unwilling
- Don't know

INTERVIEWER NOTE: YOU WILL BE PRESENTED WITH OPTIONS RANDOMLY. CONTINUE UNTIL THE PROGRAMME IS COMPLETE THEN MOVE TO THE NEXT SECTION.

SHOW CARD A

ALL BBC SERVICES

Thinking about you and your household, and thinking about ALL BBC programmes and services shown on the card.

**QD4 Would you and your household be willing to pay as a voluntary monthly subscription ...
[SINGLE CODE]**

		Number of code
QD4a	more than £32.50 a month /£389 annually?	
QD4b	£32.50 a month /£389 annually?	
QD4c	£28.50 a month /£339 annually?	
QD4d	£24 a month /£289 annually?	
QD4e	£20 a month /£239 annually?	
QD4f	£16 a month /£189 annually?	
QD4g	£11.50 a month /£139 annually?	
QD4h	£7.50 a month / £89 annually?	
QD4i	less than £7.50 a month /£89 annually?	

SINGLE CODE [READ OUT]

1. Yes, very willing
2. Yes, fairly willing
3. No, fairly unwilling
4. No, very unwilling
5. Don't know

Gabor granger ITV1/Channel 4 /Five personal

READ OUT

ITV1, Channel 4 and Five receive the right to broadcast at a discounted rate in return for showing Public Service Broadcasting programmes. To give you an idea of cost, the current investment is equivalent to spending £1.20 per household per month (£14.40 per year) on these Public Service Broadcasting programmes. The way in which these programmes and services are provided may need to change in the future as the current arrangement may no longer work.

We are interested in your views on how much you and your household would be prepared to pay to keep Public Service Broadcasting programmes on ITV1, Channel 4 and Five.

INTERVIEWER: SHOW CARD 6

In addition to all the BBC services, shown in grey, this card shows the kind of programmes that ITV1, Channel 4 and FIVE are required to provide as part of Public Service Broadcasting.

Again, I'd like you to imagine yourself in a situation where you no longer have access to ANY of these programmes on ITV1, Channel 4 and FIVE. In order for you and your household to be able to access these programmes on ITV1, Channel 4 and FIVE again, you would need to pay a voluntary monthly subscription.

Remember, without this new voluntary subscription, you would receive all the BBC services (in grey) at the current Licence fee but NONE of the ITV1, Channel 4 or FIVE public service broadcasting programmes on the card.

I am going to ask you some different prices for this monthly subscription for ITV1, Channel 4 and FIVE public service broadcasting programmes.

For each price you can answer:

- Yes, very willing
- Yes, fairly willing
- No, fairly unwilling
- No, very unwilling
- Don't know

INTERVIEWER NOTE: YOU WILL BE PRESENTED WITH OPTIONS RANDOMLY. CONTINUE UNTIL THE PROGRAMME IS COMPLETE THEN MOVE TO THE NEXT SECTION.

SHOW CARD A

QE4 – ITV1, Channel 4 and FIVE PSB Services

Thinking about you and your household, and about ITV1, Channel 4 and FIVE Public Service Broadcasting programmes shown on the card.

Would you and your household be willing to pay ... [SINGLE CODE]

		Number of code
QE4a	More than £5 a month /£60 annually?	
QE4b	£5 a month /£60 annually?	
QE4c	£4 a month /£48 annually?	
QE4d	£3 a month /£36 annually?	
QE4e	£2 a month /£24 annually?	
QE4f	£1.20 a month / £14.40 annually?	
QE4g	less than £1.20 a month /£14.40 annually?	

SINGLE CODE [READ OUT]

- 1 Yes, very willing
- 2 Yes, fairly willing
- 3 No, fairly unwilling
- 4 No, very unwilling
- 5 Don't know

Gabor granger All Public Service Broadcasting personal

READ OUT

Now I'd like you to think about ALL Public Service Broadcasting, taking into account everything you have previously thought about for Public Service Broadcasting from the BBC and ITV1, Channel 4 and FIVE. Currently the amount spent on Public Service Broadcasting is the Licence fee at £11.62 per month (£139.50 per year) per household for the BBC and the equivalent of £1.20 per month per household (£14.40 per year) on ITV1, Channel 4 and FIVE. This represents about £13 per month per household (about £156 per year).

We are interested in your views on how much would you and your household be willing to pay for a total Public Service Broadcasting voluntary subscription for all BBC services, and public service broadcasting on ITV1, Channel 4 and Five?

SHOWCARD 7

Again, I'd like you to imagine yourself in a situation where you no longer have access to ANY of the BBC or ANY of these programmes on ITV1, Channel 4 and FIVE. You no longer pay the Licence fee. In order for you and your household to be able to access these services on the BBC, ITV1, Channel 4 and FIVE again, you would need to pay a voluntary monthly subscription.

Remember, without this new voluntary subscription, you would receive NONE of these programmes or services on the cards.

In a moment, I am going to ask you some different prices for a monthly subscription.

For each price you can answer:

- Yes, very willing
- Yes, fairly willing
- No, fairly unwilling
- No, very unwilling
- Don't know

In the previous questions you told us that you would be willing to pay

- up to <xxx> per month for ALL BBC programmes and services

- and up to <xxx> per month for ITV1, Channel 4 and FIVE Public Service Broadcasting programmes.

INTERVIEWER NOTE: YOU WILL BE PRESENTED WITH OPTIONS RANDOMLY. CONTINUE UNTIL THE PROGRAMME IS COMPLETE THEN MOVE TO THE NEXT SECTION.

SHOW CARD A

QUESTION QF3 – ALL PSB SERVICES

So thinking about you and your household, and about ALL BBC programmes and services and ITV1, Channel 4 and FIVE Public Service Broadcasting programmes shown on the card.

Would you and your household be willing to pay ... [SINGLE CODE]

		Number of code
QF3a	more than £38.00 a month /£456 annually?	
QF3b	£38.00 a month /£456 annually?	
QF3c	£32.50 a month /£389 annually?	
QF3d	£30.00 a month /£360 annually?	
QF3e	£25.50 a month /£306 annually?	
QF3f	£21.50 a month /£258 annually?	
QF3g	£17.50 a month /£210 annually?	
QF3h	£15.00 a month /£180 annually?	
QF3i	£13.00 a month /£156 annually?	
QF3j	£11.00 a month /£132 annually?	
QF3k	£9.00 a month / £108 annually?	
QF3l	less than £9.00 a month /£108 annually?	

SINGLE CODE [READ OUT]

- 1 Yes, very willing
- 2 Yes, fairly willing
- 3 No, fairly unwilling
- 4 No, very unwilling
- 5 Don't know

QF4 Please explain why you chose the amount you stated you were willing to pay for all Public Service Broadcasting.

_____ (OPEN)

PROBE: Any other reasons? PROBE FULLY

_____ (OPEN)

RANKING EXERCISE - PERSONAL**SHUFFLE CARDS**

QG1 Thinking about the types of TV programme you and your household like to watch I would like you to tell me how much you prefer each AS VIEWERS of television. To do this I would like you to sort the types of TV programme that I have put on these cards in order of PREFERENCE, with the one you and your household PREFER TO WATCH MOST on top and the one you and your household PREFER TO WATCH LEAST on the bottom. Please bear in mind this is in addition to all the BBC programmes and services you and your household have access to.

HAND RESPONDENT SHUFFLED CARDS

To help you do this I would first like you to place each card in one of three piles.

- The first pile is for types of programme that you like to watch more than others
- The second pile is for types of programme that you feel neutral about / aren't sure about
- The third pile is for types of programme that you would be unlikely or very unlikely to watch

INTERVIEWER: PLEASE CODE THE THREE PILES BELOW ONCE THE RESPONDENT HAS FINISHED, REMEMBERING TO PUT THOSE PREFER TO WATCH MOST IN THE "WATCH MORE" COLUMN ETC.

		Watch more	Neutral	Watch less
A	ITV1, Channel 4 and FIVE UK news	1	1	1
B	ITV1, Channel 4 and FIVE current affairs	2	2	2
C	ITV1 and FIVE children's programmes (Milkshake on FIVE)	3	3	3
D	ITV1, Channel 4 and Five documentaries and factual programmes about arts/science/nature/history	4	4	4
E	ITV1 news about my region	5	5	5
F	ITV1 other programming about my region	6	6	6
G	Channel 4 UK drama and comedy	7	7	7
H	Channel 4 experimental programming	8	8	8

INTERVIEWER: HAND BACK ALL CARDS TO THE RESPONDENT.

QG2 Still thinking about how MUCH YOU AND YOUR HOUSEHOLD PREFER each PROGRAMME TYPE AS VIEWERS of television, please can you rank your most preferred TV programmes starting with the most preferred, then second most preferred etc. (Again, please bear in mind this is in addition to all the BBC programmes and services you and your household have access to).

INTERVIEWER, ALLOW RESPONDENT TIME TO DO THIS.

ONCE THEY HAVE FINISHED ASK THEM TO CONFIRM THAT THE MOST PREFERRED OF THESE IS AT THE TOP.

PLEASE RECORD ANSWERS FOR THIS QUESTION BELOW

Please use leading zeroes where applicable

A	ITV1, Channel 4 and FIVE UK news
B	ITV1, Channel 4 and FIVE current affairs
C	ITV1 and FIVE children's programmes (Milkshake on FIVE)
D	ITV1, Channel 4 and Five documentaries and factual programmes about arts/science/nature/history
E	ITV1 news about my region
F	ITV1 other programming about my region
G	Channel 4 UK drama and comedy
H	Channel 4 experimental programming

QK1 – Conjoint - PERSONAL
[READ OUT]

We would like to know what programmes and services you and your household would like to be provided as part of Public Service Broadcasting. This currently covers all the BBC services and the public service broadcasting programmes provided on ITV1, Channel 4 and FIVE.

To help us understand this, you will now be shown a number of different options for future Public Service Broadcasting. Each time you will see 3 options.

One of these is paying the current Licence fee for all the BBC services. For the other two options you would pay the current Licence fee for all the BBC services and the option of paying an additional voluntary subscription for public service programming on ITV1, Channel 4 and Five.

This will vary according to the type and number of Public Service Broadcasting programmes and services. Please consider each option and select the ONE you believe is best for you and your household.

RECORD CONJOINT BOOKLET NUMBER/ RECORD ANSWERS

CONJOINT

Funding

QH1 Thinking about the future, if the funding of Public Service Broadcasting on ITV1, Channel 4 and FIVE were to change, how acceptable do you feel each of the following methods of funding Public Service Broadcasting on ITV1, Channel 4 or FIVE would be?

SINGLE CODE across row

DON'T PROMPT "DON'T KNOW"

		1 Totally unacceptable	2	3	4	5	6	7	8	9	10 Totally acceptable	11 Don't know
QH1a	Direct public funding (i.e. money from central or local government from taxes)											
QH1b	National Lottery money											
QH1c	Same Licence fee (i.e. with some money allocated to ITV1, Channel 4 and FIVE Public Service Broadcasting, as well as the BBC)											
QH1d	Higher Licence fee (i.e. with some money allocated to ITV1, Channel 4 and FIVE Public Service Broadcasting, as well as the BBC)											
QH1e	Voluntary subscription (like Sky or Cable)											
QH1f	Showing more advertising on ITV1, Channel 4 and FIVE than currently allowed to											
QH1g	Industry charge (i.e. a charge on advertisers or commercial broadcasters)											

QH2 Thinking about the future, if the funding of Public Service Broadcasting on the BBC were to change, how acceptable do you feel each of the following methods of funding Public Service Broadcasting on the BBC would be?

SINGLE CODE across row

DON'T PROMPT "DON'T KNOW"

		1 Totally unacceptable	2	3	4	5	6	7	8	9	10 Totally acceptable	11 Don't know
QH2a	Direct public funding (i.e. money from central or local government from taxes)											
QH2b	National Lottery money											
QH2c	Licence fee											
QH2d	Voluntary subscription (like Sky or Cable)											
QH2e	Showing advertising on BBC channels											
QH2f	Industry charge (i.e. a charge on advertisers or commercial broadcasters)											

FURTHER DEMOGRAPHICS

CLASSIFICATION: TO BE ASKED AT THE END OF THE INTERVIEW TO ALL RESPONDENTS

READ OUT

As part of our research is it necessary to interview a wide cross-section of the public. The next few questions about you are just to ensure our sample is balanced

QJ1 Please could you tell me which of the following bands your annual household income falls (before tax)

REASSURE ABOUT CONFIDENTIALITY

SINGLE CODE SHOW CARD 8

- | | |
|--------------------------|-----------------------------|
| Under £20,000 | 1 <input type="checkbox"/> |
| £20,000 to £29,999 | 2 <input type="checkbox"/> |
| £30,000 to £39,999 | 3 <input type="checkbox"/> |
| £40,000 to £49,999 | 4 <input type="checkbox"/> |
| £50,000 to £59,999 | 5 <input type="checkbox"/> |
| £60,000 to £69,999 | 6 <input type="checkbox"/> |
| £70,000 to £79,999 | 7 <input type="checkbox"/> |
| £80,000 or more | 8 <input type="checkbox"/> |
| Don't know | 9 <input type="checkbox"/> |
| Refused | 10 <input type="checkbox"/> |
-

QJ2 Can you please tell me the number of people in your household including yourself and any children? **SINGLE CODE**

- | | | |
|-------------------|----------------------------|----------|
| 1, just me | 1 <input type="checkbox"/> | GOTO QJ6 |
| 2 | 2 <input type="checkbox"/> | |
| 3 | 3 <input type="checkbox"/> | |
| 4 | 4 <input type="checkbox"/> | |
| 5 | 5 <input type="checkbox"/> | |
| 6 | 6 <input type="checkbox"/> | |
| More than 6 | 7 <input type="checkbox"/> | |
-

Ask If QJ2 = 2-7

QJ3 And how many children under 16 live in this household?

SINGLE CODE

- | | | |
|-------------------|----------------------------|----------|
| 0 | 1 <input type="checkbox"/> | GOTO QJ6 |
| 1 | 2 <input type="checkbox"/> | |
| 2 | 3 <input type="checkbox"/> | |
| 3 | 4 <input type="checkbox"/> | |
| 4 | 5 <input type="checkbox"/> | |
| 5 | 6 <input type="checkbox"/> | |
| More than 5 | 7 <input type="checkbox"/> | |
| Refused | 8 <input type="checkbox"/> | GOTO QJ6 |
-

Ask if QJ3 = 2 - 7

QJ4 How old is/are the child/ren under 16 in your household?

MULTICODE

- 1 or under 1 ☐
 2 years old – 4 years old 2 ☐
 5 to 10 years old 3 ☐
 11 to 15 years old 4 ☐
 Refused 5 ☐ GOTO QJ6

Ask if QJ4=1 to 4

QJ5 And are you the parent or guardian of any of the children in the household?

SINGLE CODE

- Yes 1 ☐
 No 2 ☐
 Don't know 3 ☐

ASK ALL

QJ6 Do you, or anyone in your household, have any long-term illness, health problem or disability which limits your daily activities or the work you can do?

SINGLE CODE FOR EACH

	You	Other household member
Yes	1 <input type="checkbox"/>	2 <input type="checkbox"/>
No	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Don't know	5 <input type="checkbox"/>	6 <input type="checkbox"/>
Not applicable (I am the only person in household)		7 <input type="checkbox"/>

QJ7 Do you personally use the internet?

SINGLE CODE

- Yes 1 ☐
 No 2 ☐ GOTO QJ11
 Don't know / not sure 3 ☐ GOTO QJ11

If QJ7=1 ask

QJ8 Where do you access the internet?

MULTICODE

- At home 1 ☐ GOTO QJ9
 At work (out of home) 2 ☐ GOTO QJ11
 At a public place (internet café, library, by mobile phone etc) 3 ☐ GOTO QJ11
 At university / college 4 ☐ GOTO QJ11
 At school 5 ☐ GOTO QJ11
 Elsewhere (friends, relatives, etc) 6 ☐ GOTO QJ11
 Other 7 ☐ GOTO QJ11
 Don't know 8 ☐ GOTO QJ11

Ask if QJ8=1**QJ9 And which of these methods does your household use to connect to the internet at home?****MULTICODE SHOWCARD 10**

- Ordinary phone line – dial-up access 1 ☐
- Broadband – high speed access, allowing you to make telephone calls at the same time as using the internet 2 ☐
- Wireless access through a wireless router, WIFI or portable device 3 ☐
- Other 4 ☐
- Don't know 5 ☐

Ask if QJ8=1 (has any internet access)

QJ10 How often do you tend to use the internet at home?**SINGLE CODE**

- Daily/almost daily 1 ☐
- Several times per week 2 ☐
- A few times per month 3 ☐
- Less frequently 4 ☐
- Never 5 ☐
- Don't know 6 ☐

QJ11 Which of the groups on this card, if any, would you say you belong to?**SINGLE CODE SHOW CARD 9**

- Asian or Asian British-Bangladeshi 1 ☐
- Asian or Asian British-Pakistani 2 ☐
- Asian or Asian British-Other Asian Background 3 ☐
- Black or Black British-African 4 ☐
- Black or Black British-Caribbean 5 ☐
- Black or Black British-Other Black Background 6 ☐
- Chinese 7 ☐
- Mixed – White & Asian 8 ☐
- Mixed – White & Black African 9 ☐
- Mixed – White & Black Caribbean 10 ☐
- Mixed – Any other mixed background 11 ☐
- White – British 12 ☐
- White – Irish 13 ☐
- White – Any other White Background 14 ☐
- Any other 15 ☐
- Not Stating / refused 16 ☐

Ask if IQ1 = 9 or QQ7 = 11

QJ12 Do you speak Welsh?

SINGLE CODE

Yes 1 ☐

No 2 ☐

Ask if IQ1 = 9 or QQ7 = 11

QJ13 Do you listen to/watch Welsh TV (if available)?

SINGLE CODE

Yes 1 ☐

No 2 ☐

READ OUT

Thank you very much for your help. This interview has been conducted by Indiefield on behalf of Holden Pearmain Research. My name is Should you have any queries regarding this survey please contact the Research Centre Manager on, or call the Market Research Society on to verify that we are a genuine Market Research Organisation.

APPENDIX C - CITIZEN QUESTIONNAIRE

Confidential

For internal use only

Main questionnaire – Citizen views

INTRODUCTION

READ OUT

Hello, my name is from Indiefield, on behalf of Holden Pearmain, an independent market research agency. We are carrying out some research on Public Service Broadcasting and we would appreciate it if you could spend approximately 15minutes answering some questions. The survey is on behalf of Ofcom – the communications regulator. Your opinion is very important to us; if you qualify, would you be able to take part?

If necessary: This is a genuine market research study and no sales calls will result from our contact to you. The answers you give will be held in strictest confidence; they will be made anonymous and presented to our client as statistics only.

The interview will be carried out in strict accordance with the Market Research Society's Code of Conduct.

IQ1 NOTE REGION

SINGLE CODE

England

- North East 1 ☐
- North West 2 ☐
- East Midlands 3 ☐
- West Midlands 4 ☐
- East 5 ☐
- London..... 6 ☐
- South East..... 7 ☐
- South West..... 8 ☐

Wales 9 ☐

Scotland..... 10 ☐

Northern Ireland 11 ☐

IQ2 Urban/Rural

SINGLE CODE

Urban 1 ☐

Rural 2 ☐

IQ3 Area of Deprivation

SINGLE CODE

Yes 1 ☐

No 2 ☐

IQ4 RECORD POSTCODE

SCREENERS**SQ1 How many TVs do you have in your household?****SINGLE CODE**

None 1 Thank & Close ☐

1 2 ☐

2 3 ☐

3 4 ☐

4 or more 5 ☐

SQ2 Do you have a TV licence?**SINGLE CODE**

Yes 1 ☐

No 2 Thank & Close ☐

Don't know 3 Thank & Close ☐

SQ3 Were you responsible for purchasing the licence?**SINGLE CODE**

Yes, myself 1 ☐

Yes, jointly 2 ☐

No 3 ☐

It was free 4 ☐

It was free (aged 75 and over allowance) 5 ☐

SQ4 Which licence type do you have?**MULTICODE**

Full colour TV Licence 1 ☐

Full black and White TV Licence 2 ☐

People aged 74 short term licence 3 ☐

Aged 75 and over free licence 4 ☐

Blind or Severely Sight Impaired Concession Licence 5 ☐

Business with multiple sets Licence 6 ☐

Hotels, Guest houses and campsites Licence 7 ☐

ARC (Accommodation for Residential Care) Concessionary TV Licence 8 ☐

Don't know 9 ☐

SQ5 Can you please tell me if you work in any of the following industries?**MULTICODE [READ OUT]**

Marketing 1 Thank & Close ☐

Market Research 2 Thank & Close ☐

Journalism/media (TV, radio, newspaper, Magazine) 3 Thank & Close ☐

Advertising 4 Thank & Close ☐

None of these 5 ☐

QUOTA SHEET**QQ1 RECORD GENDER****SINGLE CODE**

Male 1 ☐
 Female 2 ☐

QQ2 Please tell me which of the following age groups you fall into:**SINGLE CODE [READ OUT]**

Under 18..... 1 Thank & Close ☐
 18-24..... 2 ☐
 25-34..... 3 ☐
 35-44..... 4 ☐
 45-54..... 5 ☐
 55-64..... 6 ☐
 65-74..... 7 ☐
 75 and over..... 8 ☐
 Refused..... 9 Thank & Close ☐

QQ3 Which is the occupation of the Chief Income Earner in your household? (That is the person with the largest income whether from employment, pension, state benefits, investments or any other source?)**SINGLE CODE – SHOW CARD 1**

Professional 1 (AB) ☐
 Senior Management..... 2 (AB) ☐
 Senior Civil Servant 3 (AB) ☐
 Middle Management 4 (AB) ☐
 Executive 5 (AB) ☐
 Local Government Officer..... 6 (AB) ☐
 Civil Service Officer 7 (AB) ☐
 Education 8 (AB) ☐
 Services/Military 9 (C1) ☐
 Junior Management 10 (C1) ☐
 Skilled manual..... 11 (C2) ☐
 Semi-skilled manual..... 12 (D) ☐
 Un-skilled manual 13 (D) ☐
 Apprentice 14 (D) ☐
 Unemployed (up to 6 months)..... 15 GO TO QQ4 ☐
 Unemployed (over 6 months)..... 16 (E) ☐
 Unable to work due to illness/disability (for up to 6 months) 17 GO TO QQ4 ☐
 Unable to work due to illness/disability (for over 6 months) 18 (E) ☐
 Retired (state pension) 19 (E) ☐
 Retired (private / occupational /earnings related pension) 20 GO TO QQ4 ☐
 Self employed 21 (B) ☐
 Other 22 Thank & Close ☐
 Don't know..... 23 Thank & Close ☐
 Refused 24 Thank & Close ☐

QQ4 Can you please tell me what the previous occupation of the Chief Income Earner in your household was?**SINGLE CODE – SHOW CARD 1**

- Professional 1 (AB) ☐
- Senior Management..... 2 (AB) ☐
- Senior Civil Servant 3 (AB) ☐
- Middle Management 4 (AB) ☐
- Executive 5 (AB) ☐
- Local Government Officer..... 6 (AB) ☐
- Civil Service Officer 7 (AB) ☐
- Education 8 (AB) ☐
- Services/Military 9 (C1) ☐
- Junior Management 10 (C1) ☐
- Skilled manual..... 11 (C2) ☐
- Semi-skilled manual..... 12 (D) ☐
- Un-skilled manual 13 (D) ☐
- Apprentice 14 (D) ☐
- Unemployed (up to 6 months) 15 (E) ☐
- Unemployed (over 6 months) 16 (E) ☐
- Unable to work due to illness/disability (for up to 6 months) 17 (E) ☐
- Unable to work due to illness/disability (for over 6 months) 18 (E) ☐
- Retired (state pension) 19 (E) ☐
- Retired (private / occupational /earnings related pension) 20 (E) ☐
- Self employed 21 (B) ☐
- Other 22 Thank & Close ☐
- Don't know..... 23 Thank & Close ☐
- Refused 24 Thank & Close ☐

QQ5 DO NOT ASK – RECORD SOCIAL CLASS USING MRS OCCUPATION CATEGORIES

- AB 1 ☐
- C1 2 ☐
- C2 3 ☐
- DE 4 ☐

QQ6 Are you:**SINGLE CODE [READ OUT]**

- Working full time (30 hours + per week) 1 ☐
- Working part time (8 to 29 hours a week) 2 ☐
- Working part time (less than 8 hours a week 3 ☐
- Not working..... 4 ☐
- At school/college/university..... 5 ☐
- Unemployed..... 6 ☐
- Retired 7 ☐
- Refused..... 8 Thank & Close ☐

QQ7 Which ITV1 region is your main TV tuned to (or watched most often)?

SINGLE CODE. PROMPT AND READ OUT IF NECESSARY

STV (formerly Grampian/STV)	1	<input type="checkbox"/>
Border	2	<input type="checkbox"/>
Tyne-Tees	3	<input type="checkbox"/>
Yorkshire	4	<input type="checkbox"/>
Granada	5	<input type="checkbox"/>
Anglia	6	<input type="checkbox"/>
Central	7	<input type="checkbox"/>
Meridian	8	<input type="checkbox"/>
London	9	<input type="checkbox"/>
ITV Wales	10	<input type="checkbox"/>
ITV West.....	11	<input type="checkbox"/>
West Country	12	<input type="checkbox"/>
UTV	13	<input type="checkbox"/>
Don't know	14	<input type="checkbox"/>

TV VIEWING HABITS**QA1 Who in your household watches TV?****MULTICODE**

Myself..... 1 ☐
 Partner 2 ☐
 Children 3 ☐
 Other adults 4 ☐

IF CODE 1 (MYSELF) NOT ANSWERED – THANK & CLOSE.

QA2 On an average day how many hours would you say you watch TV?**SINGLE CODE**

Up to 1 hour per day 1 ☐
 1-3 hours per day 2 ☐
 4-6 hours per day 3 ☐
 Over 6 hours a day 4 ☐
 Never watch TV 5 ☐
 Don't know 6 ☐

QA3 Which, if any, of these types of television does your household receive as its MAIN type of TV at the moment?**MULTICODE SHOWCARD 2**

Only the main TV channels (BBC One, BBC Two, ITV1, Channel 4, Five) 1 ☐ GOTO QA6
 Cable TV (through Virgin Media / NTL / Telewest) 2 ☐ GOTO QA5
 Satellite TV (Sky) 3 ☐ GOTO QA4
 Satellite TV (other) 4 ☐ GOTO QA4
 Freeview (through a set-top box or digital television set) ONLY with free channels 5 ☐ GOTO QA6
 Freeview (through a set-top box or digital television set) with free channels PLUS top-up channels such as Cartoon
 Network or the Discovery Channel 6 ☐ GOTO QA6
 Freesat 7 ☐ GOTO QA6
 Digital TV via a broadband DSL line (from HomeChoice, Tiscali or Kingston Communications) 8 ☐ GOTO QA6
 Other (please write in.....) 9 ☐ GOTO QA6
 Don't know 10 ☐ GOTO QA6

Ask if QA3=1**QA3i Are you able to receive any of the following channels on your MAIN TV set in your household?**

-
- | | | |
|-------------------------------------|----|--------------------------|
| BBC Three or BBC Four..... | 1 | <input type="checkbox"/> |
| BBC News Channel (BBC News 24)..... | 2 | <input type="checkbox"/> |
| CBBC or CBeebies | 3 | <input type="checkbox"/> |
| BBC Parliament..... | 4 | <input type="checkbox"/> |
| ITV2 | 5 | <input type="checkbox"/> |
| ITV3 | 6 | <input type="checkbox"/> |
| E4 | 7 | <input type="checkbox"/> |
| Sky One | 8 | <input type="checkbox"/> |
| Sky News | 9 | <input type="checkbox"/> |
| None of these..... | 10 | <input type="checkbox"/> |

Ask if QA3i = 1-9**QA3ii Please could you confirm whether you have any of the types of television in your household as your MAIN type of TV?**

-
- | | | | |
|---|----|--------------------------|----------|
| Only the main TV channels (BBC One, BBC Two, ITV1, Channel 4, Five) | 1 | <input type="checkbox"/> | GOTO QA6 |
| Cable TV (through Virgin Media / NTL / Telewest) | 2 | <input type="checkbox"/> | GOTO QA5 |
| Satellite TV (Sky)..... | 3 | <input type="checkbox"/> | GOTO QA4 |
| Satellite TV (other)..... | 4 | <input type="checkbox"/> | GOTO QA4 |
| Freeview (through a set-top box or digital television set) ONLY with free channels..... | 5 | <input type="checkbox"/> | GOTO QA6 |
| Freeview (through a set-top box or digital television set) with free channels PLUS top-up channels such as Cartoon Network or the Discovery Channel | 6 | <input type="checkbox"/> | GOTO QA6 |
| Freesat | 7 | <input type="checkbox"/> | GOTO QA6 |
| Digital TV via a broadband DSL line (from HomeChoice, Tiscali or Kingston Communications)..... | 8 | <input type="checkbox"/> | GOTO QA6 |
| Other (please write in.....) | 9 | <input type="checkbox"/> | GOTO QA6 |
| Don't know..... | 10 | <input type="checkbox"/> | GOTO QA6 |
-

Ask if QA3=3 or 4 or if QA3ii = 3 or 4 (Satellite TV)

QA4 Do you use your satellite television service to receive subscription channels or free-to-air services only?**IF NECESSARY: Do you pay a monthly subscription fee on top of what you paid to have the dish installed?****SINGLE CODE**

- | | | |
|---|---|--------------------------|
| Receive subscription channels (pay a monthly subscription fee)..... | 1 | <input type="checkbox"/> |
| Free-to-air services only (no monthly subscription fee) | 2 | <input type="checkbox"/> |
| Don't know | 3 | <input type="checkbox"/> |
-

Ask if QA3=2 or QA3ii = 2 (cable TV)

QA5 Do you use your cable television service to receive subscription channels or free-to-air services only?

IF NECESSARY: Do you pay a monthly subscription fee for your cable TV service?

SINGLE CODE

- Receive subscription channels (pay a monthly subscription fee)..... 1 ☐
 Free-to-air services only (no monthly subscription fee) 2 ☐
 Don't know 3 ☐

QA6 Which of these channels or services would you say you and your household watch/use regularly in an average week? That is a few times a week or more.

MULTICODE [READ OUT]

- BBC One 1 ☐
 BBC Two 2 ☐
 ITV1 3 ☐
 Channel 4 4 ☐
 FIVE 5 ☐
 BBC Three or BBC Four..... 6 ☐
 BBC News Channel (BBC News 24)..... 7 ☐
 CBBC or CBeebies 8 ☐
 BBC Parliament..... 9 ☐
 Other TV Channels 10 ☐
 BBC Radio services 11 ☐
 BBC.co.uk (BBC website) 12 ☐
 BBC iplayer..... 13 ☐

INTERVIEWER NOTE: IF ASKED, PLEASE DESCRIBE BBC iplayer AS "BBC iPlayer is the service that lets you access BBC television programmes via your PC".

QA7 Which TV channel do you personally watch the most in an average week?

SINGLE CODE [READ OUT]

- BBC One 1 ☐
 BBC Two 2 ☐
 ITV1 3 ☐
 Channel 4 4 ☐
 FIVE..... 5 ☐
 BBC Three or BBC Four..... 6 ☐
 BBC News Channel (BBC News 24)..... 7 ☐
 CBBC or CBeebies 8 ☐
 BBC Parliament..... 9 ☐
 Other TV Channels (PLEASE SPECIFY) 10 ☐

QA8 What kinds of programmes do you and your household watch regularly, that is a few times a week or more?

MULTICODE [READ OUT]

- | | | |
|--|----|--------------------------|
| UK News | 1 | <input type="checkbox"/> |
| Current affairs programmes (e.g. Tonight with Trevor McDonald, Panorama, Dispatches) | 2 | <input type="checkbox"/> |
| News about my region (e.g. London Tonight, Midlands Today) | 3 | <input type="checkbox"/> |
| Aside from news, other programmes about my region for people in my region (e.g. Inside Out, The Way We Were, The Politics Show, Dales Diary) | 4 | <input type="checkbox"/> |
| UK children's programmes | 5 | <input type="checkbox"/> |
| Documentaries and factual programmes about arts/science/nature/history | 6 | <input type="checkbox"/> |
| Other factual programmes including hobbies, leisure and consumer affairs (e.g. Masterchef, Daily Cooks Challenge, and The Gadget Show) | 7 | <input type="checkbox"/> |
| UK soaps | 8 | <input type="checkbox"/> |
| UK drama | 9 | <input type="checkbox"/> |
| UK comedy | 10 | <input type="checkbox"/> |
| Sport | 11 | <input type="checkbox"/> |
| Entertainment (e.g. Strictly Come Dancing, X Factor,) | 12 | <input type="checkbox"/> |
| Religious programmes | 13 | <input type="checkbox"/> |
| Other | 14 | <input type="checkbox"/> |
| None of these | 15 | <input type="checkbox"/> |
| Don't know | 16 | <input type="checkbox"/> |

Public Service Broadcasting

Some programmes on TV are provided for the good of UK society as a whole. They aim to:

- help us to understanding what's going on in the world
- inform and educate
- reflect UK's cultural identity
- make us aware of different cultures and opinions within the UK.

These programmes are required to be high quality, engaging, new and made in the UK. This is called Public Service Broadcasting.

All BBC channels, programmes and services are Public Service Broadcasting.

INTERVIEWER: Hand **SHOWCARD 3** to respondent
This card shows BBC's programmes and services.

ITV1, Channel 4 and FIVE are also required to provide some Public Service Broadcasting programmes.

INTERVIEWER: Hand **SHOWCARD 4** to respondent

This card shows the types of Public Service Broadcasting programmes offered by ITV1, Channel 4 and Five.

I'd now like to ask you some questions about the BBC, ITV1, Channel 4 and Five and their public service broadcasting requirements.

THE BBC

QC1 The BBC is required to provide a wide range of high quality, engaging, new programming and services made in the UK. Its programmes and services aim to:

- help us to understanding what's going on in the world
- inform and educate
- reflect UK's cultural identity
- make us aware of different cultures and opinions within the UK.

Its programmes and services are for all audiences, provided across all its TV channels (BBC One, BBC Two, BBC Three, BBC Four, CBeebies, CBBC, BBC News Channel (BBC News 24), BBC Parliament) and also BBC Radio services and the BBC's website and online services.

SINGLE CODE [SHOW CARD 5]

On a scale of 1 to 10, where 1 is "does not achieve these targets at all" and 10 is "completely achieves these targets" how would you rate the BBC on achieving these targets set?

Does not achieve these targets at all									Completely achieves these targets
1	2	3	4	5	6	7	8	9	10

ITV1, Channel 4 and FIVE

QC2 ITV1 is required to make and show new, high quality programmes from in and around the UK, including UK news, current affairs, documentaries, factual programmes (e.g. about arts/science/history/nature), news about my region, other programmes about my region, as well as some children's programming.

SINGLE CODE [SHOW CARD 5]

On a scale of 1 to 10, where 1 is "does not achieve these targets at all" and 10 is "completely achieves these targets" how would you rate ITV1 on achieving these targets set?

Does not achieve these targets at all									Completely achieves these targets
1	2	3	4	5	6	7	8	9	10

QC3 Channel 4 is required to make and show new, distinctive, innovative and educational programming that is different from the other TV channels, including high quality UK news, current affairs, documentaries, factual programmes (e.g. about arts/science/nature/history), UK drama and comedy and experimental programming.

SINGLE CODE [SHOW CARD 5]

On a scale of 1 to 10, where 1 is "does not achieve these targets at all" and 10 is "completely achieves these targets" how would you rate Channel 4 on achieving these targets set?

Does not achieve these targets as all									Completely achieves these targets
1	2	3	4	5	6	7	8	9	10

QC4 FIVE is required to make and show new, high quality UK news, current affairs, documentaries, factual programmes (e.g. about arts/science/nature/history) and children's programmes.

SINGLE CODE [SHOW CARD 5]

On a scale of 1 to 10, where 1 is "does not achieve these targets at all" and 10 is "completely achieves these targets" how would you rate FIVE on achieving these targets set?

Does not achieve these targets at all									Completely achieves these targets
1	2	3	4	5	6	7	8	9	10

Gabor-Granger BBC (random prices) – Citizen Perspective

READ OUT

As you probably know, the BBC currently receives its money by charging an annual licence fee, which must be paid by all households that have a television. At the moment this costs each household £11.62 per month (£139.50 per year).

Look at the card which shows the kind of programmes and services provided by the BBC.

SHOWCARD 3

The way in which BBC Services are provided in the future may need to change. Thinking about the good of UK society as a whole, we are interested in your views on how much you and your household would be prepared to pay to keep all the BBC services.

Imagine that there is a national vote on the future of the BBC. You have a choice of either:

- a) paying for the BBC at the price presented to you
- b) not paying the price and this means the BBC would close, all BBC programmes and services would stop for everyone in the UK and the licence fee would not be charged.

Bearing this in mind, in a moment, I am going to ask you some different prices for a monthly cost.

For each price you can answer:

- Yes, very willing
- Yes, fairly willing
- No, fairly unwilling
- No, very unwilling
- Don't know

INTERVIEWER NOTE: YOU WILL BE PRESENTED WITH OPTIONS RANDOMLY. CONTINUE UNTIL THE PROGRAMME IS COMPLETE THEN MOVE TO THE NEXT SECTION.

SHOW CARD A

QUESTION QD3 – ALL BBC PSB SERVICES

Thinking about the good of UK society as a whole, and thinking about ALL BBC programmes and services shown on the card (Showcard 3).

Would you and your household be willing to pay ... [SINGLE CODE]

		Number of code
QD3a	more than £32.50 a month /£389 annually, bearing in mind that if you do not, the BBC will no longer exist?	
QD3b	£32.50 a month /£389 annually bearing in mind that if you do not, the BBC will no longer exist?	
QD3c	£28.50 a month /£339 annually bearing in mind that if you do not, the BBC will no longer exist?	
QD3d	£24 a month /£289 annually bearing in mind that if you do not, the BBC will no longer exist?	
QD3e	£20 a month /£239 annually bearing in mind that if you do not, the BBC will no longer exist?	
QD3f	£16 a month /£189 annually bearing in mind that if you do not, the BBC will no longer exist?	
QD3g	£11.50 a month /£139 annually bearing in mind that if you do not, the BBC will no longer exist?	
QD3h	£7.50 a month / £89 annually bearing in mind that if you do not, the BBC will no longer exist?	
QD3i	less than £7.50 a month /£89 annually bearing in mind that if you do not, the BBC will no longer exist?	

SINGLE CODE [READ OUT]

- 1 Yes, very willing
- 2 Yes, fairly willing
- 3 No, fairly unwilling
- 4 No, very unwilling
- 5 Don't know

READ OUT

Gabor-Granger ITV1, Channel 4 and Five (random prices) – Citizen Perspective

READ OUT

ITV1, Channel 4 and Five receive the right to broadcast at a discounted rate in return for showing Public Service Broadcasting programmes. To give you an idea of cost, the current investment is equivalent to spending £1.20 per household per month (£14.40 per year) on these Public Service Broadcasting programmes. The way in which these programmes and services are provided may also need to change in the future as the current arrangement may no longer work.

INTERVIEWER: SHOW CARD 6 (WITH GREYED OUT SECTION)

In addition to all the BBC services (shown in grey) this card shows the kind of programmes that ITV1, Channel 4 and FIVE are required to provide as part of Public Service Broadcasting.

Thinking about the good of UK society as a whole, we are interested in your views on how much you and your household would be prepared to pay to keep public service broadcasting programmes on ITV1, Channel 4 and Five.

Imagine that there is a national vote on the future of the public service broadcasting on ITV1, Channel 4 and Five.

You have a choice of two options:

Please bear in mind that in each case you would still receive all the BBC services at the current licence fee.

The options are:

- a) paying for public service broadcasting programmes on ITV1, Channel 4 and Five at the price presented to you
- b) not paying the price and this means the public service broadcasting programmes on ITV1, Channel 4 and Five would stop for everyone in the UK.

Showcard A

Bearing this in mind, in a moment, I am going to ask you some different prices for a monthly cost.

For each price you can answer:

- Yes, very willing
- Yes, fairly willing
- No, fairly unwilling
- No, very unwilling
- Don't know

INTERVIEWER NOTE: YOU WILL BE PRESENTED WITH OPTIONS RANDOMLY. CONTINUE UNTIL THE PROGRAMME IS COMPLETE THEN MOVE TO THE NEXT SECTION.

SHOW CARD A

QUESTION QE3 – ITV1, Channel 4 and FIVE PSB Services

Thinking about the good of UK society as a whole and thinking about ITV1, Channel 4 and FIVE Public Service Broadcasting programmes shown on the card.

Would you and your household be willing to pay ... [SINGLE CODE]

		Number of code
QE3a	More than £5 a month /£60 annually bearing in mind that if you do not, the services shown on the card will no longer exist?	
QE3b	£5 a month /£60 annually bearing in mind that if you do not, the services shown on the card will no longer exist?	
QE3c	£4 a month /£48 annually bearing in mind that if you do not, the services shown on the card will no longer exist?	
QE3d	£3 a month /£36 annually bearing in mind that if you do not, the services shown on the card will no longer exist?	
QE3e	£2 a month /£24 annually bearing in mind that if you do not, the services shown on the card will no longer exist?	
QE3f	£1.20 a month / £14.40 annually bearing in mind that if you do not, the services shown on the card will no longer exist?	
QE3g	less than £1.20 a month /£14.40 annually bearing in mind that if you do not, the services shown on the card will no longer exist?	

SINGLE CODE [READ OUT]

- 1 Yes, very willing
- 2 Yes, fairly willing
- 3 No, fairly unwilling
- 4 No, very unwilling
- 5 Don't know

Gabor-Granger all Public Service Broadcasting (random prices) – Citizen Perspective

Now I'd like you to think about ALL Public Service Broadcasting, taking into account everything you have previously thought about for Public Service Broadcasting from the BBC and ITV1, Channel 4 and FIVE. Currently the amount spent on Public Service Broadcasting is the licence fee at £11.62 per month (£139.50 per year) per household for the BBC and the equivalent of £1.20 per month per household (£14.40 per year) on ITV1, Channel 4 and Five. This represents about £13 per month per household in total (about £156 per year).

SHOWCARD 7

Thinking about the good of UK society as a whole, we are interested in your views on how much you and your household would be prepared to pay to keep all these public service broadcasting programmes, channels and services.

Imagine that there is a national vote on the future of the public service broadcasting on the BBC, ITV1, Channel 4 and Five. You have a choice of either

- a) paying for all BBC programmes and services, and the public service broadcasting programmes on ITV1, Channel 4 and Five at the price presented to you
- b) not paying the price and this means the BBC would close, the licence fee would not be charged and all BBC services, and public service broadcasting programmes on ITV1, Channel 4 and Five would stop for everyone in the UK.

SHOWCARD A

Bearing this in mind, in a moment, I am going to ask you some different prices for a monthly cost

For each price you can answer:

- Yes, very willing
- Yes, fairly willing
- No, fairly unwilling
- No, very unwilling
- Don't know

In the previous questions you told us that you would be willing to pay

- up to <xxx> per month for ALL BBC programmes and services
- and up to <xxx> per month for ITV1, Channel 4 and FIVE Public Service Broadcasting programmes.

INTERVIEWER NOTE: YOU WILL BE PRESENTED WITH OPTIONS RANDOMLY. CONTINUE UNTIL THE PROGRAMME IS COMPLETE THEN MOVE TO THE NEXT SECTION.

SHOW CARD A

QUESTION QF2 – ALL PSB SERVICES

Thinking about the good of UK society as a whole, and thinking about ALL BBC programmes and services and ITV1, Channel 4 and FIVE Public Service Broadcasting shown on the cards.

Would you and your household be willing to pay ... [SINGLE CODE]

		Number of code
QF2a	more than £38.00 a month /£456 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2c	£38.00 a month /£456 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2d	£32.50 a month /£389 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2e	£30.00 a month /£360 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2f	£25.50 a month /£306 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2g	£21.50 a month /£258 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2h	£17.50 a month /£210 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2i	£15.00 a month /£180 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2j	£13.00 a month /£156 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2k	£11.00 a month /£132 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2l	£9.00 a month / £108 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	
QF2m	less than £9.00 a month /£108 annually bearing in mind that if you do not, the channels and services shown on the card will no longer exist?	

SINGLE CODE [READ OUT]

- 6 Yes, very willing
- 7 Yes, fairly willing
- 8 No, fairly unwilling
- 9 No, very unwilling
- 10 Don't know

QF3 Please explain why you chose the amount you stated you were willing to pay for all Public Service Broadcasting.

_____ (OPEN)

PROBE: Any other reasons? PROBE FULLY

_____ (OPEN)

RANKING EXERCISE - Citizen**SHUFFLE CARDS**

QG1 Thinking about the types of TV programme available I would like you to tell me how **IMPORTANT** each **TELEVISION PROGRAMME TYPE IS TO UK SOCIETY AS A WHOLE**. To do this I would like you to sort the types of TV programme that I have put on these cards in order of **THEIR IMPORTANCE**, with the one you **FEEL IS MOST IMPORTANT TO UK SOCIETY AS A WHOLE** on top and the one you **FEEL IS least IMPORTANT** on the bottom. Please bear in mind this is in addition to all the BBC programmes and services you and your household have access to.

HAND RESPONDENT THE SHUFFLE CARDS

To help you do this I would first like you to place each card in one of three piles.

- The first pile is for types of programme that you **FEEL ARE MORE IMPORTANT TO UK SOCIETY AS A WHOLE THAN others**
- The second pile is for types of programme that you feel neutral about / aren't sure about
- The third pile is for types of programme that **ARE OF LITTLE OR NO IMPORTANCE TO UK SOCIETY AS A WHOLE**.

INTERVIEWER: PLEASE CODE THE THREE PILES BELOW ONCE THE RESPONDENT HAS FINISHED, REMEMBERING TO PUT THOSE THEY FEEL ARE MORE IMPORTANT IN THE "MOST IMPORTANT" COLUMN ETC.

		More important	Neutral	No importance
A	ITV1, Channel 4 and FIVE UK News	1	1	1
B	ITV1, Channel 4 and FIVE current affairs	2	2	2
C	ITV1 and FIVE children's programmes (Milkshake on FIVE)	3	3	3
D	ITV1, Channel 4 and Five documentaries and factual programmes about arts/science/nature/history	4	4	4
E	ITV1 news about my region	5	5	5
F	ITV1 other programming about my region	6	6	6
G	Channel 4 UK drama and comedy	7	7	7
H	Channel 4 experimental programming	8	8	8

INTERVIEWER: HAND BACK ALL CARDS TO THE RESPONDENT.

QG2 Still thinking about how IMPORTANT each PROGRAMME TYPE IS TO UK SOCIETY AS A WHOLE, please can you rank the most important programmes starting with the MOST IMPORTANT, then second most IMPORTANT etc. Please bear in mind this is in addition to all the BBC programmes and services you and your household have access to.

INTERVIEWER, ALLOW RESPONDENT TIME TO DO THIS.

ONCE THEY HAVE FINISHED ASK THEM TO CONFIRM THAT THE MOST PREFERRED OF THESE IS AT THE TOP.

PLEASE RECORD ANSWERS FOR THIS QUESTION BELOW

Please use leading zeroes where applicable

A	ITV1, Channel 4 and FIVE UK news
B	ITV1, Channel 4 and FIVE current affairs
C	ITV1 and FIVE children's programmes (Milkshake on FIVE)
D	ITV1, Channel 4 and Five documentaries and factual programmes about arts/science/nature/history
E	ITV1 news about my region
F	ITV1 other programming about my region
G	Channel 4 UK drama and comedy
H	Channel 4 experimental programming

Funding

QH1 Thinking about the future, if the funding of Public Service Broadcasting on ITV1, Channel 4 and FIVE were to change, how acceptable do you feel each of the following methods of funding Public Service Broadcasting on ITV1, Channel 4 or FIVE would be?

SINGLE CODE across row

DON'T PROMPT "DON'T KNOW"

		1 Totally unacceptable	2	3	4	5	6	7	8	9	10 Totally acceptable	11 Don't know
QH1a	Direct public funding (i.e. money from central or local government from taxes)											
QH1b	National Lottery money											
QH1c	Same Licence fee (i.e. with some money allocated to ITV1, Channel 4 and FIVE Public Service Broadcasting, as well as the BBC)											
QH1d	Higher Licence fee (i.e. with some money allocated to ITV1, Channel 4 and FIVE Public Service Broadcasting, as well as the BBC)											
QH1e	Voluntary subscription (like Sky or Cable)											
QH1f	Showing more advertising on ITV1, Channel 4 and FIVE than currently allowed to											
QH1g	Industry charge (i.e. a charge on advertisers or commercial broadcasters)											

QH2 Thinking about the future, if the funding of Public Service Broadcasting on the BBC were to change, how acceptable do you feel each of the following methods of funding Public Service Broadcasting on the BBC would be?

SINGLE CODE across row

DON'T PROMPT "DON'T KNOW"

		1 Totally unacceptable	2	3	4	5	6	7	8	9	10 Totally acceptable	11 Don't know
QH2a	Direct public funding (i.e. money from central or local government from taxes)											
Qh2b	National Lottery money											
QH2c	Licence fee											
QH2d	Voluntary subscription (like Sky or Cable)											
QH2e	Showing advertising on BBC channels											
QH2f	Industry charge (i.e. a charge on advertisers, or commercial broadcasters)											

FURTHER DEMOGRAPHICS

CLASSIFICATION: TO BE ASKED AT THE END OF THE INTERVIEW TO ALL RESPONDENTS

READ OUT

As part of our research it is necessary to interview a wide cross-section of the public. The next few questions about you are just to ensure our sample is balanced

QJ1 Please could you tell me which of the following bands your annual household income falls (before tax)

REASSURE ABOUT CONFIDENTIALITY**SINGLE CODE SHOW CARD 8**

- | | |
|--------------------------|-----------------------------|
| Under £20,000 | 1 <input type="checkbox"/> |
| £20,000 to £29,999 | 2 <input type="checkbox"/> |
| £30,000 to £39,999 | 3 <input type="checkbox"/> |
| £40,000 to £49,999 | 4 <input type="checkbox"/> |
| £50,000 to £59,999 | 5 <input type="checkbox"/> |
| £60,000 to £69,999 | 6 <input type="checkbox"/> |
| £70,000 to £79,999 | 7 <input type="checkbox"/> |
| £80,000 or more | 8 <input type="checkbox"/> |
| Don't know | 9 <input type="checkbox"/> |
| Refused | 10 <input type="checkbox"/> |
-

QJ2 Can you please tell me the number of people in your household including yourself and any children? **SINGLE CODE**

- | | | |
|-------------------|----------------------------|----------|
| 1, just me | 1 <input type="checkbox"/> | GOTO QJ6 |
| 2 | 2 <input type="checkbox"/> | |
| 3 | 3 <input type="checkbox"/> | |
| 4 | 4 <input type="checkbox"/> | |
| 5 | 5 <input type="checkbox"/> | |
| 6 | 6 <input type="checkbox"/> | |
| More than 6 | 7 <input type="checkbox"/> | |
-

Ask If QJ2 = 2-7

QJ3 And how many children under 16 live in this household?

SINGLE CODE

- | | | |
|-------------------|----------------------------|----------|
| 0 | 1 <input type="checkbox"/> | GOTO QJ6 |
| 1 | 2 <input type="checkbox"/> | |
| 2 | 3 <input type="checkbox"/> | |
| 3 | 4 <input type="checkbox"/> | |
| 4 | 5 <input type="checkbox"/> | |
| 5 | 6 <input type="checkbox"/> | |
| More than 5 | 7 <input type="checkbox"/> | |
| Refused | 8 <input type="checkbox"/> | GOTO QJ6 |
-

Ask if QJ3 = 2 - 7

QH4 How old is/are the child/ren under 16 in your household?

MULTICODE

- 1 or under 1 ☐
 2 years old – 4 years old 2 ☐
 5 to 10 years old 3 ☐
 11 to 15 years old 4 ☐
 Refused 5 ☐ GOTO QJ6

Ask if QJ4=1 to 4

QH5 And are you the parent or guardian of any of the children in the household?

SINGLE CODE

- Yes 1 ☐
 No 2 ☐
 Don't know 3 ☐

ASK ALL

QJ6 Do you, or anyone in your household, have any long-term illness, health problem or disability which limits your daily activities or the work you can do?

SINGLE CODE FOR EACH

	You	Other household member
Yes	1 <input type="checkbox"/>	2 <input type="checkbox"/>
No	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Don't know	5 <input type="checkbox"/>	6 <input type="checkbox"/>
Not applicable (I am the only person in household)		7 <input type="checkbox"/>

QJ7 Do you personally use the internet?

SINGLE CODE

- Yes 1 ☐
 No 2 ☐ GOTO QJ11
 Don't know / not sure 3 ☐ GOTO QJ11

If QJ7=1 ask

QJ8 Where do you access the internet?

MULTICODE

- At home 1 ☐ GOTO QJ9
 At work (out of home) 2 ☐ GOTO QJ11
 At a public place (internet café, library, by mobile phone etc) 3 ☐ GOTO QJ11
 At university / college 4 ☐ GOTO QJ11
 At school 5 ☐ GOTO QJ11
 Elsewhere (friends, relatives, etc) 6 ☐ GOTO QJ11
 Other 7 ☐ GOTO QJ11
 Don't know 8 ☐ GOTO QJ11

Ask if QJ8=1**QJ9 And which of these methods does your household use to connect to the internet at home?****MULTICODE SHOWCARD 9**

- Ordinary phone line – dial-up access 1 ☐
- Broadband – high speed access, allowing you to make telephone calls at the same time as using the internet 2 ☐
- Wireless access through a wireless router, WIFI or portable device 3 ☐
- Other 4 ☐
- Don't know 5 ☐

Ask if QJ8=1 (has any internet access)

QJ10 How often do you tend to use the internet at home?**SINGLE CODE**

- Daily/almost daily 1 ☐
- Several times per week 2 ☐
- A few times per month 3 ☐
- Less frequently 4 ☐
- Never 5 ☐
- Don't know 6 ☐

QJ11 Which of the groups on this card, if any, would you say you belong to?**SINGLE CODE SHOW CARD 10**

- Asian or Asian British-Bangladeshi 1 ☐
- Asian or Asian British-Pakistani 2 ☐
- Asian or Asian British-Other Asian Background 3 ☐
- Black or Black British-African 4 ☐
- Black or Black British-Caribbean 5 ☐
- Black or Black British-Other Black Background 6 ☐
- Chinese 7 ☐
- Mixed – White & Asian 8 ☐
- Mixed – White & Black African 9 ☐
- Mixed – White & Black Caribbean 10 ☐
- Mixed – Any other mixed background 11 ☐
- White – British 12 ☐
- White – Irish 13 ☐
- White – Any other White Background 14 ☐
- Any other 15 ☐
- Not Stating / refused 16 ☐

QJ12 Do you speak Welsh?**SINGLE CODE**

- Yes 1 ☐
- No 2 ☐

QJ13 Do you listen to/watch Welsh TV (if available)?

SINGLE CODE

Yes 1 ☐
No 2 ☐

READ OUT

Thank you very much for your help. This interview has been conducted by Indiefield on behalf of Holden Pearmain Research. My name is Should you have any queries regarding this survey please contact the Research Centre Manager on, or call the Market Research Society on to verify that we are a genuine Market Research Organisation.

APPENDIX D - Show cards for Gabor Granger exercise (England)

Public Service Broadcasting provided by BBC.

<p><u>All</u> BBC services as a whole</p>	<ul style="list-style-type: none"> • <u>BBC channels</u> <ul style="list-style-type: none"> ○ BBC One ○ BBC Two ○ BBC Three ○ BBC Four ○ CBeebies ○ CBBC ○ BBC News Channel (BBC News 24) ○ BBC Parliament • <u>BBC Radio</u> <ul style="list-style-type: none"> ○ Radio 1 ○ Radio 2 ○ Radio 3 ○ Radio 4 ○ 5 Live ○ Sports Extra ○ 6 Music ○ BBC7 ○ Asian Network ○ 1Xtra ○ Local and regional radio (46 stations throughout the UK) • <u>BBC Online services</u> <ul style="list-style-type: none"> ○ e.g. BBC.co.uk, BBC iplayer <p>This includes <u>all</u> types of programmes on the BBC including:</p> <ul style="list-style-type: none"> ○ UK news ○ Regional news ○ Other regional programming ○ Current affairs ○ Documentaries and factual programmes about arts/science/nature /history ○ Children's programmes ○ UK drama and comedy ○ Entertainment ○ Lifestyle programmes (food, gardening, consumer) ○ Sport

Public Service Broadcasting programmes that ITV1, Channel 4 and FIVE provide

Parts of ITV1	<ul style="list-style-type: none"> • UK news • Regional news (e.g. <i>Central News</i>, <i>North East Tonight</i>, <i>London Tonight</i>) • Current affairs • Documentaries and factual programmes about arts/science/nature /history • Some children's programmes • Other regional programming (e.g. <i>Tales From the Country</i>, <i>The Way We Were</i>, <i>Dales Diary</i>, <i>Northern Eye</i>, <i>Disappearing London</i>)
Parts of Channel 4	<ul style="list-style-type: none"> • UK news • Current affairs • Documentaries and factual programmes about arts/science/nature/ history • UK drama and comedy • Experimental programming
Parts of Five	<ul style="list-style-type: none"> • UK news • Current affairs • Documentaries and factual programmes about arts/science/nature/ history • Children's programmes on <i>Milkshake</i>

APPENDIX E - TV PLATFORM DEFINITIONS

TV platform is divided in the detailed tabulation and in general subgroup analysis within this report into three main groupings as follows:

- **Analogue terrestrial only channels**
- **Pay TV (satellite or cable)**
- **Free Multi-channel**

These definitions were derived from analysis of QA3 and questions QA4 and QA5 (see questionnaires in Appendices A and B).

Analogue terrestrial only households were those that stated that the main type of TV received by their household comprised “Only the main TV channels (BBC One, BBC Two, ITV1, Channel 4, Five)”. They also confirmed that they did not receive any of a wider range of channels at QA3i.

Pay TV households were those that claimed to receive cable TV (through Virgin Media / NTL / Telewest) or satellite TV (through Sky/ other) and who also confirmed that they pay a subscription at QA4 or QA5.

While **Free Multi-channel** households were those that mentioned Freeview only or Freesat or those who mentioned satellite or cable, but later stated that they paid no subscription at QA4 or QA5.

APPENDIX F: CONJOINT ANALYSIS

This appendix provides further details on the conjoint design and outputs. It shows the specific levels for each attribute, the form of the statistical model estimated from the data, and the key outputs.

Conjoint is used to identify the relative influence of different elements on the product or service. The elements that are to be tested need to be identified. The table below shows the elements that were tested in this conjoint exercise.

Attribute	Level 1	Level 2	Level 3	Level 4
UK News	No UK News	ITV1 UK News	ITV1 UK News/Channel 4 UK News	ITV1 UK News/Channel 4 UK News/Five UK News
Current Affairs	No Current Affairs	ITV1 Current affairs	ITV1 Current affairs/Channel 4 Current affairs	ITV1 Current affairs/Channel 4 Current affairs/Five Current affairs
Children's Programmes	No Children's Programmes	ITV1 Children's programmes	Five Children's programmes	Five Children's programmes/ITV1 Children's programmes
Documentaries and factual programmes	No Documentaries and factual programmes	ITV1 Documentaries and factual programmes (arts, nature, history, science)	ITV1 Documentaries and factual programmes (arts, nature, history, science)/Channel 4 Documentaries and factual (arts, nature, history, science)	ITV1 Documentaries and factual programmes (arts, nature, history, science)/Channel 4 Documentaries and factual (arts, nature, history, science)/Five Documentaries and factual (arts, nature, history, science)
Regional News (ITV only)	No Regional News	ITV1 Regional news		
Other regional programmes (ITV only)	No Other regional programmes	ITV1 Other regional programmes		
UK drama and comedy (C4 only)	No UK drama and comedy	Channel 4 UK drama and comedy		
Experimental programming (C4 only)	No Experimental programming	Channel 4 Experimental programming.		
Total Channel 4 and Five PSB monthly fee	£1.20 ^{xxv}	£3.00	£4.00	£5.00

^{xxv} All ITV1, Channel 4 and Five PSB options were priced at £1.20 or more above the current licence fee.

Various combinations of the elements tested are shown to respondents and they state which of the options shown they most prefer. After obtaining the choices that respondents have made, it is possible to infer the relative appeal of each of the elements tested. From this, it is possible to build a model that “plays back” the choices that a respondent would make.

Statistical Model of Choice Behaviour

We used Hierarchical Bayesian logit estimation to construct a statistical model of choice, based on standard linear-in-the-parameter utility constructs:

$$P_i = \frac{\text{Exp}(U_i)}{\sum \text{Exp}(U_{1-3})}$$

Where: P_i = probability of choosing option i
 U_i = utility of option i
 U_{1-3} = utility of each of the options, 1 to 3

$$U_i = a_0 + a_1 X_{i1} + a_2 X_{i2} + \dots + a_n X_{in}$$

Where: a_0 = constant
 $a_1 \dots a_n$ = parameters
 $X_{i1} \dots X_{in}$ = attribute levels, one for each PSB element

The model goodness-of-fit was 0.5, sufficient to have confidence in the results but at the low end of the range usually seen for these types of model. This indicated a relatively high degree of random responses in the data, likely to reflect the fact that respondents were being asked to conduct a task that was not wholly familiar to them (i.e. paying directly for public service programming on ITV1, Channel 4 and Five).

From this model we were able to construct a tool indicating the percentage take up of *all* ITV1, Channel 4 and Five PSB services at each price point tested in the conjoint. These are summarised below:

Take up of all ITV1, Channel 4 and Five public service programming at Each Conjoint price point

Price Tested	Mid point used	Uptake of Current ITV1, Channel 4 and Five PSB services
£3	£3.50	52%
£4	£4.50	51%
£5	£5	47%

The model is able to show the relative influence of each of the genres tested. This is summarised in the figure below, as a cross-check to the main ranking results in the main body of the report.

Cross-check of Genre Ranking exercises for ITV1, Channel 4 and Five public service programming

	Conjoint Values Personal sample	Ranking Exercise Personal sample
UK News	1	1
Current Affairs	2	4
Documentaries and factual programmes	3	2
UK drama and comedy (C4 only)	4	3
Children's programmes (ITV1 and Five)	5	8
Regional News (ITV1 Only)	6	5
Experimental programming (C4 only)	7	7
Other regional programmes (ITV1 only)	8	6

Ranked position of Genre from 1 – 8 where 1 is most important

Base Size (Unweighted): Ranking Personal. 1217.

Base Size (Unweighted): Conjoint Personal 992.

Comparison with the ranking derived from the conjoint analysis based on the Personal sample, with that derived from the genre ranking exercise from the same sample showed similarities, with UK news once again emerging as the first ranked genre in both cases. Here, however, the conjoint rankings showed higher rankings for current affairs and for children's programmes on ITV1 and Five; while the genre ranking for the Personal sample showed higher ranked positions for documentaries and factual programmes, UK drama and comedy on Channel 4 and for regional news on ITV1.

Appendix G: Acceptability of future funding methods for PSB on the BBC

Differences within Personal and Citizen sample

The study incorporated questions to assess respondents' attitudes towards possible future funding mechanisms for public service programming on ITV1, Channel 4 and Five. In order to provide a benchmark for this, respondents were also asked about attitudes towards funding mechanisms for the BBC. In the main report the results are presented based on the total sample (i.e. combined Personal and Citizen sample), as this question was identical in both samples.

In the case of attitudes to funding for the BBC, differences were seen between Personal and Citizen samples for the Licence fee, which in fact lead to a slightly different ranking of the two most acceptable funding approaches between these samples.

In both cases an industry charge is clearly seen as most acceptable (comparable at 5.9 Personal and 5.9 Citizen), but this was followed by the Licence Fee for the Citizen sample (5.1 Personal and 5.5 Citizen), compared with National Lottery funding in second place for the Personal sample (again comparable at 5.3 Personal and 5.4 Citizen).

Figure 24: Attitudes towards Funding Methods for BBC

	Mean Scores		% Acceptable 7-10	
	Citizen	Personal	Citizen	Personal
Direct Public Funding	4.9	5.1	33	35
National Lottery Money	5.4	5.3	40	41
Licence Fee	5.5	5.1	41	32
Voluntary Subscription	4.9	4.8	30	29
Showing Advertising on BBC Channels	5.2	5.1	37	40
Industry Charge	5.9	5.9	42	45

QH2 If the funding of PSB on the BBC were to change, how acceptable do you feel each of the following methods of funding PSB on BBC would be?
Means and percents excludes Don't Know's. Base Size (Unweighted) Citizen 1095, Personal 1,217

Given the slightly different emphasis given to these two funding methods in the two samples, it is also, therefore, useful to examine variations in the acceptability of the Licence Fee at a subgroup level, within each sample, to examine where this difference is derived.

In the case of the Citizen sample, the acceptability of the Licence fee was significantly stronger in England (5.7), among 18-24s (6.0), the AB and C1 SEG (6.6 and 5.9 respectively) and those for whom BBC1 was their most watched channel (5.7), and generally less so in Scotland (4.6) and Wales (4.9) and among the DE SEG (4.8).

In the case of the Personal sample, by contrast, there was no strong regional variation or age related trend in acceptability of the Licence Fee, though there was again greater acceptability apparent among the AB SEG (5.4) and those for whom BBC1 was their most watched channel (5.5), and generally less acceptance among the DE SEG (4.6).

Hence, stronger results from England and among the young towards the Licence Fee within the Citizen sample compared with Personal sample, appears to contribute to the stronger acceptability of the Licence Fee within the Citizen sample. In addition, however, there was a generally greater acceptance of the Licence Fee across almost all subgroups for the Licence fee as method of funding when introduced in the context of the Citizen questionnaire, where earlier questions had asked about the value of BBC programmes and services when thinking about UK society as a whole, rather than when thinking about themselves and their household, as in the Personal sample.