

# The audience's view on the future of Public Service Broadcasting

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Final Report

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# Publication of data

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Ofcom has engaged Ipsos MORI to undertake an objective programme of research. It is important to protect everyone's interests by ensuring that the research findings are accurately reflected in any press release or publication.

As part of our standard terms and conditions, the publication of the findings of this report is therefore subject to the advance approval of Ipsos MORI. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

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# Glossary

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|                                     |   |
|-------------------------------------|---|
| BBC                                 | British Broadcasting Corporation  |
| DSO                                 | Digital Switch Over   |
| ITV                                 | Independent Television  |
| Main five PSB channels              | BBC One, BBC Two, ITV1, Channel 4, Five   |
| Main broadcaster portfolio channels | Digital channels provided by the main broadcasters, e.g. ITV2, ITV3, BBC Three, BBC Four, More 4, E4, Five life, Five US, etc |
| PSB                                 | Public Service Broadcasting   |

# 1. Executive Summary

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The media landscape has changed considerably over recent years, and continues to do so. Access to digital television and the internet is rising, giving people unprecedented choice. Alongside this, society is becoming more diverse. Because of this, the way we watch television is changing and the main five Public Service Broadcasting channels (BBC One, BBC Two, ITV1, Channel 4, Five) are facing a strong challenge to retain reach and impact. This report examines the future of Public Service Broadcasting (PSB) in this context.

The research reports draws on two sources; a UK wide quantitative survey among people 16+ investigating people's attitudes towards television, and specifically public service broadcasting now and in the future. Secondly, a series of day-long deliberative workshops were conducted with people 16+ which had similar aims.

## Understanding society and television

- In the deliberative workshops, participants tended to be **very positive about their local community, and valued the different cultures and traditions that exist in the UK**. Their attachment to their local cultures and traditions was particularly strong, given that these were thought to be under threat from globalisation and, in particular, from the USA. There was also a sense that **certain social standards within the UK are declining**. Referenced as symptomatic of this were perceived increasing rates of anti-social behaviour, a rise in materialism and the importance of celebrity culture.
- Many participants felt that television has a real role to play in society today. Rather than being a cause of societal problems, **it was believed that television could have a positive impact, serving to educate people about different cultures and traditions thus fostering understanding and better community links**. This is borne out in the quantitative survey which found that just under eight in ten people (79%) said that TV has an important social role to play.
- Looking into the purpose of television in more detail, in the deliberative workshops participants identified three key roles that it can fulfil. Firstly, they thought **television was a key source of entertainment**. Many participants felt that they were under a great deal of pressure in their lives and, watching the television was a means to relax and unwind.
- Secondly, television was seen to be important in providing people with an understanding of UK culture and identity as a whole, as well as **building understanding and awareness between communities about different values, lifestyles and perspectives on the world around them**. This is reflected in the quantitative study findings, where three quarters of people

(75%) thought that television should help to promote understanding of religions, cultures and lifestyles. Because of the ways in which society was perceived to be becoming more diverse and fragmented, this role was considered to be more important than ever. Television was also still very much seen as a social occasion, with many participants talking of how they liked to watch TV with friends and family members.

- Thirdly, many participants also thought television had an important role to play **in educating and informing people**. Results from the quantitative survey showed that over four in five people (83%) agreed that they had personally learned useful things from watching TV and a similarly high amount (78%) believed that television is influential in shaping public opinion.
- The research studies looked into the different ways in which people access media content and there are clear signs of change, particularly among the young. That said, for the majority, the main five channels remained the first port of call when switching on the television. The reasons for this were explored in the deliberative workshops in which participants stated that these channels were familiar and trusted. **The quantitative survey results showed they were the main source of all types of news, entertainment, and knowledge about topics such as art, science and nature and history.** However, there were signs of people spending less time watching the main channels, due in part to increased choice from digital channels and the internet.
- **Digital channels are emerging as an important source for different media interests.** In the quantitative study, **digital channels were the** most named source for a range of media needs for a significant minority of people. For example, among people with cable/satellite television, the digital channels were the most named source for entertainment, knowledge about topics and sports news. However, among this group, the main channels remain key for all types of news. In the deliberative workshops, **those with families in particular, thought the digital channels provided a convenient means of ensuring they could access the programmes they wanted at a time that suited them.**
- **For the more technologically competent and younger people, the internet was also seen as an important source for a variety of media interests.** However, this differed widely by age. Just under one third (29%) of younger people (aged 16-24) use the internet for their personal interests and pastimes compared to two in ten overall and just 5% of over 65s. When compared to either the main channels or the digital channels, the internet is the main source people turn to in order to discover new things and to find out about people with similar interests to themselves. The younger generation in particular felt that the internet is starting to be more important than television for some media needs and interests. In the deliberative workshops there were also signs of media convergence, with some participants mentioning using online services such as 4oD to access



programmes, and also spoke of downloading programmes as well as watching videos or user generated content on YouTube.

### The role of PSB in society

- It emerged in the deliberative workshops that people highly valued PSB. **People think it imperative that PSB programmes are well-made, inclusive and entertaining. They should also be informative and educational.**
- The research examined the importance of UK content in the production of PSB. **UK content was seen by many participants as key.** Not only were UK broadcasters trusted but, in addition, participants felt that they would be able to accurately and credibly tap into the concerns and issues facing UK society today. However, this was felt to be more important for some genres than others. In particular, it was seen as essential that the UK network news, current affairs, and national/regional/local news and current affairs programmes are made in the UK and reflect life in the UK; it was less important for religious and arts programmes. These priorities were also reflected in the quantitative results. In addition, children's programmes made in the UK were deemed important by a high proportion of parents.
- However, a significant minority of **participants also valued programmes from overseas and thought they could contribute to PSB, particularly by offering different perspectives on the world.** It was felt that, often, the standard of imported programmes is very high. When asked to choose between a high proportion of UK made programmes and the best of programmes from overseas on the main channels, results from the quantitative survey show that the majority (58%) chose UK programmes, whereas 22% chose overseas programmes.
- Participants in the deliberative workshops explored the issue of whether television should cater for the interests of the majority or different audience interests. Opinion on this was mixed. **Some participants were concerned solely with their own viewing enjoyment and believed their personal needs would be better met by programmes which catered for the majority.** Furthermore, many felt that this would make economic sense as it would help guarantee higher viewer ratings. In the quantitative survey: when asked if people would prefer a 'wide variety of programme types' or 'more popular entertainment programmes most people watch' 59% opted for a wide variety, whereas just under one third chose more popular programmes, emphasising the lack of consensus on the matter.

- Beyond this though, given the rate with which society was perceived to be changing, many participants believed that showing programmes which cater for the majority would work to help educate new arrivals to the country about the traditions and cultures of the UK. When respondents were asked to choose between 'TV programmes that reflect the needs and concerns of different communities within the UK' and 'TV programmes that reflect the needs and concerns of the UK as a whole', a majority of people (64%) preferred content that reflects the UK as a whole.
- This suggests that people feel the social role that TV has to play has **two distinct elements** that need to be balanced in order for it to be seen as **inclusive** – both **catering for different audiences** with a range of different programmes, but at the same time acting as an **expression of people's common values** in order to bring society together.
- In relation to this, the quantitative research shows that, with the exception of news and serious factual programming, there are differences between people's personal and social priorities for programme content on the main channels. This variation in response is linked to people's perceptions of TV. In the deliberative workshops TV was valued as an entertainment medium; people tend to watch soaps and films for entertainment and therefore have a personal preference for them. On the other hand people place high social value on a range of programme types, such as current affairs or regional/national news and express a desire to ensure their continued provision.

### The current delivery of PSB

- The PSB programme genres that the majority of people of all ages, socio economic groups and ethnicity thought it is important to show a range of programme types on the main channels, with **UK news, current affairs, regional/national news and current affairs programmes, programmes that are made in the UK and reflect life here and serious factual programmes gaining the highest levels of support**. Religious and arts programmes were seen as being of relatively less importance (even though they were considered key in their own right by some groups of people).
- **UK network news** was consistently rated as **the most important part of PSB. This was because it was perceived to be good for society as a whole and people individually**. Participants in the deliberative research viewed all types of news as being their window on the world.
- Thinking about the current provision of PSB, it was felt that plurality – the delivery of PSB content on more than one channel – was of real importance by participants. **Without plurality, there was a perception that, not only would people be less informed on any given issue**

**but, due to a lack of competition, standards would fall.** Therefore many believed it was appropriate, and desirable, for more than one of the main channels to show the same type of programmes. This was particularly true of UK network news.

- In the quantitative survey, almost nine in ten members of the public (86%) believed it is important that the **news** is shown on more than one of the main channels. This thinking also applied to the other genres that were seen to be core to PSB; **current affairs, regional/national news and current affairs, and serious factual programmes.** In the deliberative workshops the need to provide a range of perspectives and to ensure that different tastes are catered for were some reasons given for plural provision of these genres.
- **News is the key element of regional/national programme provision and plural supply was seen to be important for the majority of people, particularly in the devolved nations.** Levels of support for regions and nations programming in general tended to be higher among people in each of the devolved nations. Representation of nations and regions on network television was seen as particularly important for people living outside of London, although in relative terms the quantitative survey shows that it is a less important part of provision than regional/national news.
- **The main channels** were perceived to **cater for different audiences.** The public had **very high expectations of the BBC** which is seen as an established and trusted broadcaster and the cornerstone of PSB provision. In the quantitative survey, over nine in ten people (93%) agreed that the BBC should have a responsibility to set high standards. Channel 4 was seen by participants as an important provider of PSB because it was believed to be more appropriate for younger viewers due to its risk taking approach. Three in five people (62%) in the quantitative survey said that Channel 4 caters for audiences that other channels do not. ITV1 was seen as providing family viewing and was an important provider of regional/national news. Five enjoys much lower expectations, but a small majority still thought it should show PSB content such as news and children's programming.
- The quantitative survey shows that **there is broad public satisfaction with the amount of PSB currently available on the main five channels.** This did not vary significantly among people with access to different TV platforms. For nearly all types of programming, at least 60% of people felt that the amount of programming was about right. **Serious factual, programmes which encourage learning about different topics and UK comedies were the areas where people were more likely to want more and one quarter of parents (24%) wanted more children's programmes made in the UK. One in five people wanted more regional/national news and more programmes made in the UK.**

- The research studies show that some people are also **valuing content provided by the main broadcasters on digital channels**. In the quantitative survey, just over half (53%) agreed that it is important that the main broadcasters as a whole provide additional digital channels. This rises to 68% among 16-24 year olds (importance declines with age) and 62% among people with cable/satellite. Some participants in the deliberative research were of the opinion that PSB type content is currently shown on some digital channels. To illustrate, of those participants with access to multichannel TV, many felt that some of the main broadcasters' portfolio channels, such as BBC Four and More 4, provided very high quality content. Commercial digital channels such as Sky News were also mentioned by some.
- A small majority of people **also value content provided by the main broadcasters online**. Just over half (53%) think it is important that the main TV broadcasters as a whole provide websites which offer additional content about different topics, including news and entertainment. This rises to 70% among those aged 16-24 and those with access to broadband. Positive views were also expressed about the social and educational roles of the internet in the quantitative survey; three in four (75%) agree that the internet is a valuable source of information and learning. Among people with internet access over nine in ten (91%) have personally learnt useful things from the internet. Three in five (60%) people agree that it has a social role to play as well as providing entertainment and information and this rises to three quarters among people with internet access. These sentiments were echoed in the deliberative workshops though there was also some caution expressed, in particular, about ease of access and trustworthiness of online content.

### The provision of PSB in the future

- When thinking about the future, **participants in the deliberative research believed that television will continue to play an important role in society**. However, there was a perception that the ways in which content is accessed will change. Participants believed that there will be a rise in people using the internet and, after Digital Switch Over (DSO), digital channels will rise in prominence.
- Despite this, **even after DSO, the vast majority of participants believed that the main five channels will remain key destinations for PSB content**, due to issues around navigation and the perception that these were credible sources of information.
- There was also a **perceived need for plurality in the future**. Many **believed that, as a result of issues arising from ease of navigation, trust and familiarity, the main channels would remain the destination of choice for many**. Consequently, participants felt that it

would be important to provide plurality by programme type on the main five channels in the years ahead. This was particularly true for the key genres such as the UK network news and regional/national news programming; in general the vast majority felt that at least one of the main channels, in addition to the BBC, should show PSB programmes in the future.

- In the deliberative workshops, when asked whether any programme types could move onto either digital channels or the internet **within the context of financial pressures on the main channels, participants were prepared for some programme types to shift onto other platforms.** Parents were prepared for children's programmes to be provided on digital channels and this was seen to have advantages of safe, dedicated, clearly sign posted space, and convenience. When thinking about the internet, many participants felt that educational content, and specifically schools' programming, could be moved onto this platform. It was believed that learning is both a solitary and interactive process and, therefore, one which is more suited to the internet than television. (For both children's programmes and schools programmes there remained high levels of support for plural provision to provide a diversity of viewpoints and choice).
- The quantitative survey asked respondents which programme types need to remain on the main TV channels in the future and which don't as long as the content is available on either digital channels or the internet. **The majority still thought that most programme types should continue to be shown on the main channels in the future. Support was strongest for news:** nine in ten (92%) believe that news programmes should be shown on the main channels, while three in four (74%) think the same for news about their nation/region and current affairs. The programme types that the least number of people thought needed to be shown on the main TV channels in the future were the ones which catered for niche interests, although still roughly two in five people were supportive: arts programmes made in the UK (42%) and religious programmes made in the UK (37%).
- Participants raised **concerns about navigation and findability in relation to putting PSB content on the digital channels. To help overcome this, some suggested that the main broadcasters develop their portfolio channels on niche lines** as with the children's digital channels. Some believed that the broadcasters were already headed in this direction; BBC Three was seen as being a destination site for UK comedy while More 4 was praised for its documentaries.
- **Participants also urge caution in general about putting content online; they still had concerns about their ability to find trusted content on the internet** and, consequently, suggested that the main broadcasters advertise PSB 'destination' sites so that people know where to go.

- In the deliberative workshops participants were asked how much they would be prepared to pay to maintain current levels of PSB content on the main channels in the future. This was presented within the context of increased financial pressure on the commercial PSB channels, (ITV1, Channel 4 and Five), in the face of rising levels of competition. While, instinctively, many participants reacted against this and did not see why they should have to pay more to receive the same provision of PSB as they do today, **on balance the majority would be prepared to pay more in the future due to the important role that PSB and, in particular, plurality plays in society.** However, if they are expected to pay more participants want assurances about where the money would be spent.

## 2. Methodological approach

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### 2.1 Background

1.1 Ofcom is currently conducting Phase One of its second Review of Public Service Broadcasting (PSB). Ofcom has two statutory objectives in relation to this Review:

- i) To assess the current delivery of public service broadcasting.
- ii) To recommend ways of maintaining and strengthening quality of public service broadcasting in the future.

To support this, Ofcom commissioned Ipsos MORI to carry out a series of deliberative workshops among members of the general public. The workshops examined the benefits that PSB is perceived to bring and how this content should be delivered in the future, bearing in mind the changes occurring in society and within the media landscape.

In addition to the deliberative work, Ipsos MORI was commissioned to undertake a quantitative survey among members of the general public across the UK to provide a robust statistical measure of views and perceptions of PSB, how it is currently accessed and how it should be delivered in the future. Further details of the methodological approach to the quantitative study are found later in this chapter.

### 2.2 Study Objectives

The research aimed to explore public perceptions of PSB and how this content should be delivered in the future.

The objectives of the study overall were to:

- Understand the role of television in society today – what it is used for, the perceived benefits derived from it and how it compares to other forms of media;
- Determine views on the make up of society and how it is perceived to be changing;
- Explore attitudes towards PSB – what is valued about this and the perceived impact it can have on both individuals and society more broadly;
- Ascertain, in detail, views on the content of PSB including the importance of providing UK content, perceptions of the different programme types and plurality of content;



- Discuss perceptions of how PSB is delivered today including the provision by the main channels, (including S4C in Wales) and how this compared to the main broadcasters' portfolio channels, the commercial digital channels and the internet;
- Understand how the provision of PSB may need to change in the future;
- Explore perceptions of whether people are prepared to pay more in the future in order to keep the same levels of PSB provision that there are today.

## 2.3 Deliberative Methodology

To meet these objectives, a qualitative methodology was assessed to be the most appropriate approach. Qualitative research is a dynamic process; it not only seeks to establish what people know and think, but also why they hold particular views and the factors that drive their opinions.

It was also vital that this study adopted deliberative techniques, which are designed to inform research participants about key issues so they can arrive at considered conclusions about the matter in question. Our past work for Ofcom has shown that there is limited awareness and understanding of the term 'PSB', and discussion around issues such as preparedness to pay can be very contentious.

Using deliberative techniques allows researchers to go beyond immediate reactions or responses based on, for example, knee-jerk reactions or media portrayal of an issue in order to have a balanced debate about the issues. This is carried out by introducing information to participants (through presentations, stimulus material and case studies), which helps them to develop their thinking more broadly or encourages them to consider new ideas. Furthermore, the extended time period of a workshop (in this case, over seven hours) allows researchers to spend more time with participants, debating and deliberating the topics and working with them to ensure they understand, in depth, the issues at stake.

To achieve this, it was crucial that the deliberative stimulus materials were independent, accessible and comprehensive in order to allow people to fully engage in the debate and make informed decisions and choices. Some of the stimulus presented to participants comprised factual data and was relayed to them in plenary sessions by expert witnesses from Ofcom. Other stimulus comprised hypothetical scenarios centred on the future of television and were discussed in the break-out groups as a means of prompting debate. The stimulus materials were developed in close consultation with Ofcom and can be found in the appendices.



Deliberative research also allows us to track how views change (and what influences this change) as part of the research process. In our analysis stage we were able to compare responses given to specific questions at the recruitment stage with those given to the same questions at the beginning and immediate end of the workshops. We also included a reconvened workshop, where we were able to determine not only how views changed throughout the course of the workshop itself (specifically in response to stimulus provided) but also after a period of time. Overall, this approach will help Ofcom to understand better how the provision of PSB may need to change in response to future developments and the extent to which this type of content is important to the public.

## 2.4 Research design

The research comprised two stages. First, six day long workshops were conducted throughout the UK with up to 30 participants, followed by a reconvened event in London. Table 2.1 shows the locations and dates of the six events which were held across the UK.

Table 2.1 – locations and dates of the events

| Location   | Date                           | Socioeconomic group | Age     |
|------------|--------------------------------|---------------------|---------|
| London     | 19 October 2007                | ABC1C2DE            | 18 – 70 |
| Birmingham | 24 October 2007                | C2DE                | 16 – 60 |
| Edinburgh  | 31 October 2007                | C2DE                | 18 – 70 |
| Swansea    | 3 November 2007                | BC1C2               | 18 – 70 |
| Durham     | 10 November 2007               | BC1C2               | 18 – 70 |
| Belfast    | 17 November 2007               | BC1C2               | 18 – 70 |
| London     | 24 <sup>th</sup> November 2007 | ABC1C2DE            | 18 - 70 |

Within these workshops, we set quotas on age, gender, media platform usage, social class, internet access and location to ensure we were able to speak with those from more rural, as well as urban, areas. A full demographic breakdown of the sample profile is included in the appendices. For the reconvened workshop, we invited a selection of participants from each of the

first six workshops to ensure there was a good spread of opinion, socio-demographics and other key factors.

## 2.5 Quantitative Methodology

The 2007 quantitative study involved face to face interviews across the UK. In total, 2,260 interviews were undertaken with UK adults age 16+ between 17<sup>th</sup> October and 7<sup>th</sup> December 2007. Sample points were selected based on region, rural vs urban location, deprivation and cable coverage. The sample was then selected based on quotas for region, gender, age, ethnicity and work status.

In order to ensure enough interviews were completed in each of the four nations, England, Scotland, Wales and Northern Ireland to allow for statistical analysis at the national level, the sample was disproportionately stratified to boost the number of interviews in the devolved nations.

### **Weighting the data**

The survey data have been weighted according to region, work status, and age to reflect the population profile nationally within each nation – England, Scotland, Wales and Northern Ireland. Because the survey was stratified to boost the number of interviews in the devolved nations the effective base size of the sample reduced to 1,310. The sample is also representative of television platform and internet access in the UK.

## 2.6 Definitions, presentation and interpretation of the data

### **Interpreting the qualitative findings**

While qualitative research was the most appropriate methodological approach for this study (as it seeks to identify the range of views, opinions and experiences of people), it is important to bear in mind that it utilises smaller samples that are chosen purposively, to ensure representation of a full range of views within the sample. Qualitative research is designed to be illustrative and can not only tell us what people think but why they do so. However, qualitative research is reflective of the views of any given group rather than being representative at a broader level and does not look to produce large-scale statistics. This needs to be taken into account when interpreting the research findings. In addition, it is important to bear in mind that the research deals with perceptions rather than facts (though of course perceptions can be facts to those who hold them).

Throughout the report we have made use of verbatim comments to exemplify a particular viewpoint. It is important to be aware that these views do not necessarily represent the views of all participants.

It should also be noted that there was a great deal of commonality in the views of participants, regardless of their socio-economic background, lifestage

or location. This was due to the fact that their attitudes to the importance of PSB often transcended these characteristics and their reasons for this are discussed in detail throughout this report. However, where there are key sub group differences (and these emerged most frequently in relation to national/regional/local programming) we have made reference to these.

In addition, we have illustrated participants' views by showing data collected from the interactive voting undertaken by participants during the events. They are extremely useful in highlighting shifts in attitudes throughout the day, and are also supported by the views expressed in the workshops. The sample size and breakdown is included in the appendix. Please treat these figures with some caution given the relatively small base sizes and purposive method of recruitment<sup>1</sup>. They have not been weighted to the UK population profile and are indicative only.

### **Interpreting the quantitative data**

It should be remembered when looking at results from the quantitative study that a sample, and not the entire UK population, has been interviewed. In consequence, all results are subject to sampling tolerances, which means that not all differences are statistically significant. It is worth noting that a 95% confidence ratio is applied to the quantitative data. This means that the confidence with which we can make this prediction is usually chosen to be 95% - that is, the chances are 95 in 100 that the "true" value will fall within a specified range. A guide to statistical reliability is appended.

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<sup>1</sup> Please note that the percentage totals in some figures do not equal 100 due to computer rounding.

In 2003 Ofcom commissioned a quantitative survey of adults across the UK to establish views on PSB and its future. This survey took the form of a self-completion postal questionnaire. The results of the 2003 survey were used to provide a baseline measure of attitudes across the UK with the aim to help measuring change in the future.

Where possible, data from the 2007 survey are compared with the 2003 data, however all comparisons are made with caution as the two surveys were conducted using different methodologies (postal self-completion in 2003, compared with face to face interviews in 2007<sup>2</sup>), and the overall structure of the questionnaire also changed between these years. Given these different methodologies we have applied a 99% confidence ratio, rather than the standard 95%, when comparing the data. This means that the chances are 99 in 100 that the "true" value will fall within a specified range. As a result, a greater level of difference is required before changes in findings between the two surveys are considered significant.

Where percentages do not sum to 100, this is due to computer rounding, the exclusion of "don't know" categories, or multiple answers. Throughout the volume, an asterisk (\*) denotes any value less than half a percent but greater than zero.

Due to space constraints it has not always been possible to write the full question and code wording in some instances, this particularly relates to geographical variations (ITV1 Wales, STV, UTV etc.) and example programmes which were included on some questions.

When asking about programme genres, examples were provided to respondents that were specific to their nation or region, for example "Aside from news and current affairs, other programmes about and made for people in Scotland, e.g. Still Game, River City, Scotsport". In this report for the charts and tables 'other programmes about my region/nation' is used as an abbreviation for the full phrase asked.

## 2.7 Report structure

This report consists of findings from both the qualitative and quantitative studies. Following this introduction, the report is divided into four sections:

- Understanding society and the role of television;
- The role of PSB in society;
- The importance of plurality;
- The current delivery of PSB; and,

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<sup>2</sup> For example, in the postal survey there tends to be higher proportions of blanks/no answers.

- PSB provision in the future.

### 3. Understanding society and television

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This chapter explores perceptions of society and, in particular, how it was perceived to be changing. These taken together, it analyses what role television and the internet have to play in this society, as well as the different media platforms people use to fulfil different media needs and finally, what people say they are watching on television. This is useful contextual information and helps us to better understand the perceived impact that PSB was felt to have on society more generally.

This chapter falls into three broad sections. Firstly, in order to set the scene it considers what people think of society today. Secondly, it evaluates how society is changing. Finally, and most importantly, it asks what role television and the internet play in society.

In the deliberative workshops participants tended to be very positive about their local community and valued the different traditions and cultures that exist in the UK. When thinking more broadly, however, there was a sense that standards within UK society are declining. Referenced as symptomatic of this were perceived increasing rates of anti-social behaviour, a rise in materialism and the importance of celebrity culture.

Many felt that television has a real role to play in society today. When discussing the purpose of television in more detail, participants identified four key themes that it can fulfil – entertainment, social occasions, building links between communities and education.

Firstly people recognised TV's role as a form of entertainment. Many felt that they were under a great deal of pressure in their lives and, therefore, watching the television was a means for them to relax and unwind.

The second key theme identified was that television could help people socialise and build links with their, and other, communities. It did this in two main ways; firstly by providing people with different perspectives on the world around them and, therefore, improving awareness and understanding and, secondly, many spoke of how they liked to watch TV with friends and family members. In this sense, the TV was still very much seen as a social occasion.

Thirdly, because of the ways in which society was perceived to be changing, the role of helping to build understanding between communities and audiences was considered to be more important than ever. Seventy-nine percent of people agreed that television has an important social role to play, while 78% believe that television is influential in shaping public opinion.

Finally, many participants discussed the role that television plays in educating and informing people. They believed that it opened them up to new ways of thinking and encouraged them to think critically about the world around them. In the quantitative survey over four in five people (83%) agreed that they had personally learned useful things from watching TV.

The public is similarly positive about the role of the internet as a source of information, but believe that television has the greater social role to play. The internet was associated with personal learning, finding out information and communicating with people.

Overall satisfaction with television is high. Nearly eight in ten people are satisfied with the TV that is available as a whole.

There is clear evidence that people's media habits are changing in response to the increased choice made available via digital channels and the internet.

That said, the main channels remain the most popular main source of UK, world and regional/national and local news, entertainment (42%), sports news and information (30%) and knowledge about topics such as art, science and nature and history (27%). However, people claimed to spend less time watching the main channels with 39% of people said that they watch less television on the main channels now than they did five years ago. The main reasons were that they were either too busy or spending more time watching digital channels or online.

Digital channels are emerging as a key source for media needs for some people. They were cited as the second most used source after TV on the main channels for UK news, world news and entertainment. Among people with cable/satellite television, the digital channels were the most named source for entertainment, sports news and knowledge about topics. For those with families in particular, in the deliberative workshops, digital channels were seen to provide a convenient means of ensuring they could access the programmes they wanted at a time that suited them.

The internet is also emerging as a key source of information for some. A comparison with 2003 survey data shows that the internet has grown as a main source for a significant minority of people for a number of media needs, in particular personal interests and knowledge about different topics, although TV is still more popular overall in this area. In 2007 the internet was named the most popular main source for discovering new things and finding out about people with interests similar to your own. For the more technologically savvy and younger participants in particular, the internet was seen as important. For example, 29% of younger people named the internet as their main source for personal interests and pastimes compared to two in ten overall and just 5% of over 65s.

Usage of different media platforms varies depending on age. When asked which media platform they would find it hardest to live without 31% of people said TV on the main channels. However, those in the 16-24 and 25-34 age groups both selected the internet as the most indispensable. Conversely, the

older age groups are more likely than the general population to prefer traditional media.

There was also some evidence of media convergence. In the deliberative workshops some participants, mostly younger, talked of using online services such as 4oD to access TV content.

To help prompt discussions on participants' opinions of society today during the deliberative research, we presented a series of stimulus material which outlined ways in which society might change in the future, for example, as a result of demographic or technological change. This stimulus material can be found in the Appendix of this report. The debate around society was developed further in the reconvened workshop through the use of interactive exercises such as designing collages that depict people's perceptions of society today in the UK.

### 3.1 Perceptions of society today

The deliberative research examined participants' perceptions of society today. When encouraged to think about their immediate community, participants often expressed positive sentiments. Many participants felt a strong attachment to their local community; a feeling which was expressed more often in the regions and in rural areas. Many people valued the different traditions and cultures that exist in the UK, which they felt were under increasing threat – from globalisation in general and the United States in particular.

Participants' felt that a sense of community still exists. Even in large urban

*I've been on the same street for forty years and the media people who have moved in over the last four or five years never say hello. If there was a disaster though, we'd come together*

London

areas such as London people felt that they were part of a community which would support them if needed, even if they did not speak regularly to their neighbours.

Participants' adopted an inclusive, liberal view of society. It was felt strongly that the term 'society' should be taken to mean *everyone* that lives within the UK, regardless of their socio-demographic characteristics. Some extended this definition further, suggesting that society should also include people's behaviours and attitudinal beliefs. They stated that, while they did not necessarily agree

*It's different cultures and different people that make up society. Different age groups and different places*

Reconvened workshop

*Society is made up of everybody – whether they are good or bad*

Reconvened workshop

with the beliefs of others (especially in the case of religion) nor endorse their opinions and behaviours, it was important that people should be able to hold and express them.



### 3.2 How society is changing

Having established that people were broadly happy with their community and adopted an inclusive view of society, the research moved on to examine how they felt society was changing. There was a strong sense that the UK was experiencing a decline which manifested itself in two ways: how people behave, and what they value.

During the deliberative workshops people spoke of a decline in standards of behaviour. Many spoke of a rise in anti-social behaviour and violence. For those in urban areas (and, in particular, London, Edinburgh, Birmingham and Belfast) some participants expressed concern for their personal safety when walking around the city at night. More generally, many participants spoke of a lack of respect for others that they felt was particularly prevalent amongst the young.

*Society is becoming more materialistic. If you see something that Victoria Beckham has, people want it*  
London

When discussing the decline in values there was a strong sense that, generally, people are becoming too concerned with what they own, mistaking price for value. It was thought that this may be exacerbated by the influence of celebrities; participants believed that people are becoming overly aspirational in relation to the lifestyles they lead as a means of trying to 'keep up' with those of other people<sup>3</sup>.

### 3.3 The role of television in society today

In all the deliberative workshops there was a strong sense that television can play a useful role in society today and can, to an extent, bring people together. Perceptions of the role that television can play, along with a discussion on how people accessed broadcasters' content, is detailed throughout the remainder of this section. Following on from this, there is an explanation of what people's media interests are, the reasons for this and which platforms they use to meet these needs.

#### The four roles of television

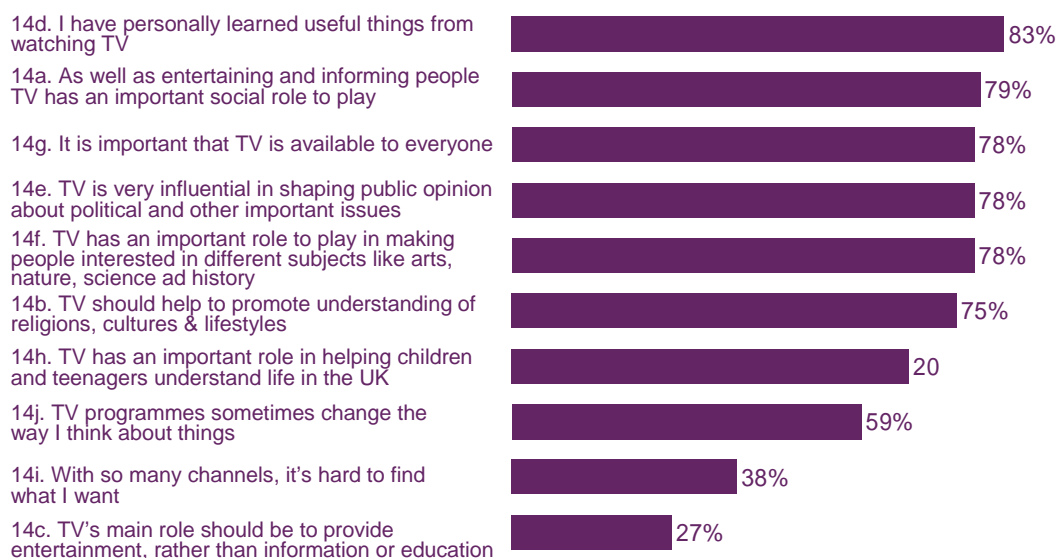
The research examined the purpose and role of television in society today. During the qualitative research participants identified four key roles that it can fulfil. These comprised providing **entertainment**, a means of **socialising**, providing **education and information**, and a means of **building communities** and society. These issues are discussed throughout the remainder of this section and results from the quantitative survey are shown in Figure 3.1 below.

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<sup>3</sup> In his study, *Affluenza*, Oliver James has referenced this trend and has pointed to a new desire to 'keep up with the Beckhams rather than the next-door Joneses.' Oliver James (2007), *Affluenza*

Figure 3.1: Respondents' attitudes towards television

**Q14 To what extent do you agree that . . . ?**



Source Q14: 2,260 interviews with UK adults aged 16+, October - December 2007

Firstly, **entertainment**. It was recognised by all participants that television plays a crucial role in people's leisure time. Many spoke of the pressures they were under – either as a result of their employment or life stage – and felt that watching television provided them with an opportunity to relax, unwind and take time out for themselves. To this end, many felt that it was important that television seeks to entertain.

*I watch TV to be entertained. I have a busy life, but I watch it to unwind*

Durham

However, opinion is divided as to whether TV's main role should be to provide entertainment, rather than to inform or educate the public. The quantitative survey found a quarter (27%) saying that this is the case, but the majority (51%) disagree.

Secondly, related to entertainment, it was felt that television can bring people together and help them **socialise**. During the deliberative research the social element of television was emphasised by many participants. They spoke of how certain programmes were watched by the whole family or with those in their peer group. Common examples here included the soaps, light

*Families are important. If you can't watch something together then it's a waste*

Edinburgh

entertainment in particular, and quiz shows. They spoke of how, in this sense, television can bring people together and provide a focal point for social activity. Therefore, for many, content which is suitable for viewing with families was deemed to be important.

Linked in with this, many spoke of how television provided a talking point among their wider group of peers. To illustrate, participants mentioned how they would often discuss, for example, plotlines of popular television programmes with their colleagues at work. Many also saw television as something of a social leveller. They believed that, when in social situations with people they did not know, television could be relied on to provide a subject of discussion on which everyone has a point of view and is able to speak freely.

*TV gives you something to talk about*  
Swansea

Thirdly, **education**. During the deliberative research participants spoke of the educating role that television can play in society. Many mentioned that as a result of watching certain programmes, they were opened up to new ways of thinking and different perspectives. This, they felt, gave them rounded opinions and enabled them to think critically about events taking place in the world today and topical issues. This is confirmed by the results of the quantitative study in which 78% agreed that TV has an important role to play in making people interested in subjects like arts, nature, science and history. Over eight in ten (83%) of respondents said they had personally learnt useful things from television, an increase from the findings in 2003. Opinion is fairly stable across different groups of people on this matter, although older people, those aged 65 and over, are particularly likely to say that TV has an important educational role to play and is available to everyone.

It is interesting to note that, when speaking spontaneously of the educational impact that television can have, participants did not limit their discussions to

*'Saturday Kitchen' has taught me how to cook properly*  
Belfast

certain programme types such as the news, current affairs or serious factual. Instead, they were much broader in their views and believed that *all kinds* of programme types

can possess educational value. To illustrate, participants spoke of the practical education that cookery and DIY programmes can bring and felt these to be just as useful as those which were more traditionally cerebrally focussed.

Finally, many participants felt that television's educational role can develop from the individual to the collective and can **help build communities** and improve social cohesion. It emerged during the deliberative research that some people believed that, given the negative

*Society is scary and the challenge of making children street-wise is worrying for parents. TV could play a bigger role in these safety and educational needs*  
Birmingham

aspects affecting society mentioned above, such as a rise in anti-social behaviour, then television could potentially help to communicate the negative impact that such behaviour can have while, at the same time, providing practical advice and help to people on how they can protect themselves and their property. It was believed that, due to the reach and power of television, this would be the most effective means of communicating this information to the broadest possible cross section of the population.

Extending this idea further, there was a sense that certain programmes that cater to common interests can bring society together more generally.

*I do sometimes feel part of a community.  
When I watch TV, BBC, I feel a part of things  
– the nice dramas, the heritage programmes*  
Reconvened workshop

Participants spoke of programmes with high viewing figures, such as sporting events and national occasions, as well as those which reflect aspects

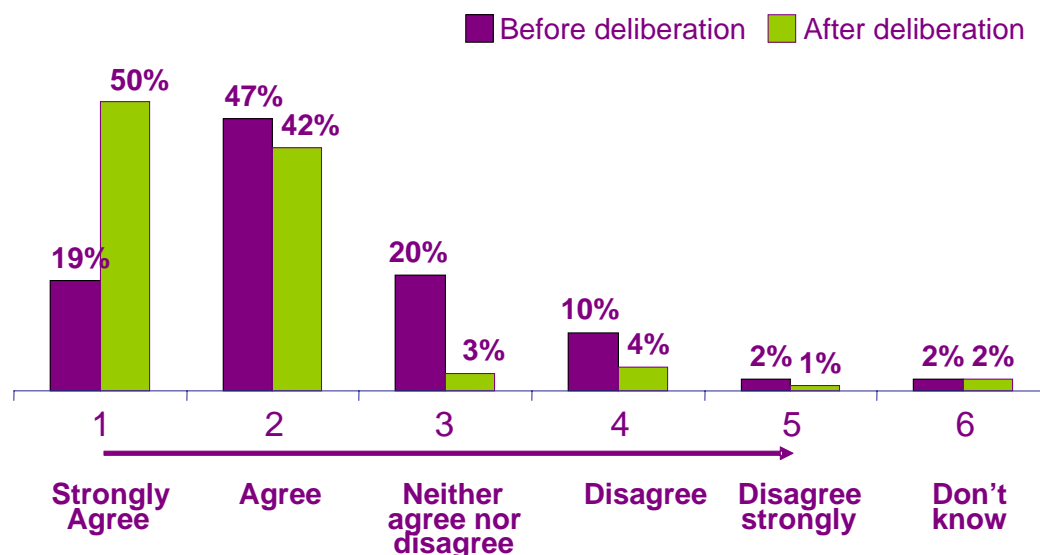
of life in the UK past and present. It was believed that watching these kinds of programmes helps create a sense of community and one of shared values.

The quantitative research again supports the idea. Figure 3.1 shows that three quarters of people (75%) say that TV should help to promote understanding of religions, cultures and lifestyles. This seems to have risen since 2003 across all demographic groups (age, sex and class) and TV platforms, and among both ethnic minority and white viewers. Two-thirds of the public (67%) also think it has a role to play in helping children and teenagers understand life in the UK.

This view on the role that television can play in society was highlighted as part of the electronic voting undertaken by participants in the deliberative research. At the beginning of the workshops, two thirds of participants agreed, with one in five agreeing strongly, that *‘as well as entertaining and informing people, TV has an important role to play for the good of society as a whole’*. After much debate on this subject, the proportion agreeing with this statement rose to over nine in ten by the end of the workshop. This shift in opinion is highlighted below in Figure 3.2.

Figure 3.2 – The role of television in society

*“As well as entertaining and informing people, TV has an important role to play for the good of society as a whole”*



Aggregated data from 6 workshops

Respondents in the quantitative survey also supported the idea of television as a social force. Figure 3.1 shows that high proportions agreed that as well as entertaining and informing, TV has an important social role to play (79%) – with people from EMGs more likely to think this is important. 78% thought that TV is very influential in shaping public opinion.

However, there was not universal support for the idea of television as a means to tackle social ills. There were a few participants who believed that, in the interests of creating a cohesive society with strong community links, then television needs to play a *less* significant role going forward. These

*Older generations used to go out and play and not watch TV in the evenings but young people today watch more and are on the Internet more. This is unhealthy and reduces interaction*

London

participants mentioned that young people now prefer to spend time indoors, watching programmes, than playing with friends. This was thought to have two main consequences; in the first, these people may

become more exposed to violence through its portrayal on the television and, secondly, may be less likely to form relationships with others and therefore lack the personal skills needed later in life to help build strong communities. This viewpoint was typically expressed by older participants and it should be remembered that those citing such issues were in the minority.

Some participants also voiced concerns about the negative impact that television can have on society. For

*People are much more aware of personal appearance and health than they were. This is all linked to seeing perfect people on the telly*

Birmingham

example, many participants cited the rise of reality TV and the preponderance of celebrities on television more generally as contributing to an increase in materialism by presenting a lifestyle and a set of behaviours to people that some felt they should copy.

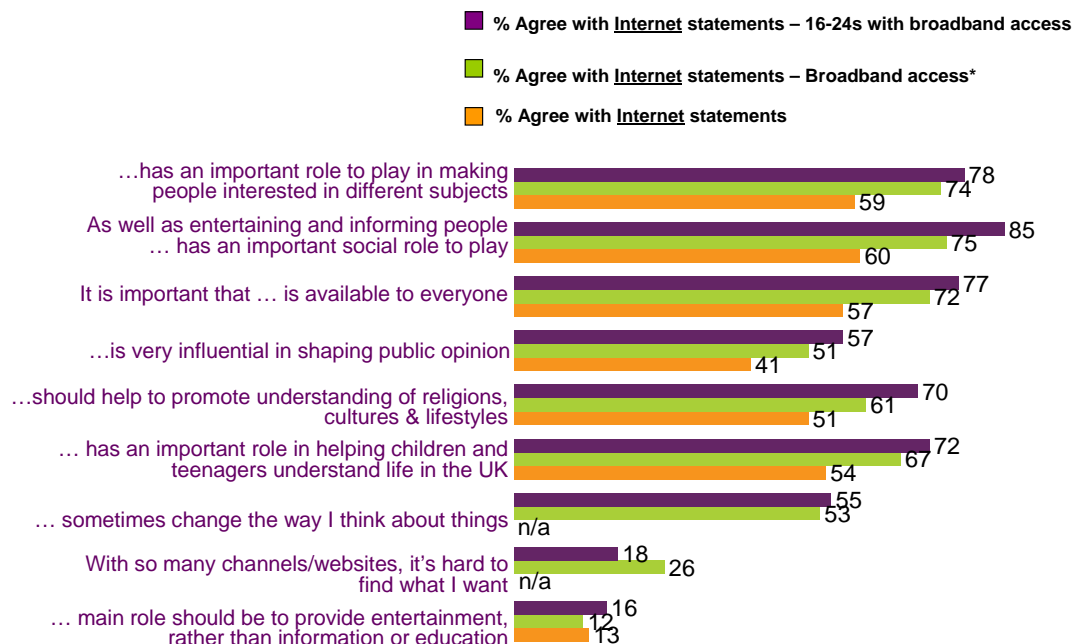
### 3.4 The role of the internet in society today

The deliberative workshops and the quantitative studies examined the role of the internet which was, primarily, seen to be a tool for learning, finding out information, communication and, particularly for younger people, also entertainment.

Although slightly less important than television for a range of needs, the quantitative survey found that the public are similarly broadly positive about the role of the internet. Unsurprisingly, among people with internet access the importance of the different roles that the internet can fulfil increased significantly (see Figure 3.3).

Figure 3.3: Respondents' attitudes towards the internet

Q15. To what extent do you agree or disagree with each of the following statements about the Internet?



Source: 15. 2,260 UK adults aged 16+, \*Base: 946; Source: 831 regular (daily) internet users aged 16+; 16-24 years with broadband, All October - December 2007

Three in four people (75%) agree that the internet is a valuable source of information and learning. This rises to 93% among people with broadband. Almost two in three (65%) think it is a valuable source of information and entertainment for children and teenagers rising to 83% among people with broadband. Three in five (60%) say that the internet has a social role to play,



as well as providing entertainment and information. This rises to 75% among people with broadband.

Access was thought to be an important issue for many, with a majority of people (57%) saying that it is important that the internet is available to everyone, rising to 72% among people with broadband. Over half of the public agreed that the internet has a role to play in educating people on different subjects (59%) which increased to almost three quarters (74%) of people with broadband. A similar proportion of people thought that the internet has an important role in helping children and teenagers understand life in the UK, with just over two thirds of people with broadband agreeing.

Of relatively less importance, although still felt by the majority of the public (51%), is that the internet can help promote understanding and tolerance of religions cultures and lifestyles, with 61% of people with broadband agreeing. A large minority (41%) feel that the internet is influential in shaping public opinion on important issues, whilst just over half of people with broadband agreed. Only a small number of people (13%) feel that the internet's main role should be to entertain, rather than inform or educate (and this was similar among people with broadband) – the majority of people (53%) disagreed.

Three questions were asked only of people with internet access. Nine in ten internet users (90%) say that they have personally learned useful things from the internet. Just over half say that websites sometimes change the way they think about things (52%). Some internet users had difficulties with navigation, with just over one quarter (26%) claiming that with 'so many websites on the internet, it's hard to find what I want'. Navigation and findability were key areas that participants raised in the deliberative workshops, particularly when talking about the future and the concept of providing PSB content online (see Chapter 7)

As has been seen, people with access to the internet are generally much more positive about the role the internet can play in society, as we would expect. However, even among people with broadband, television was still more strongly associated as a normative tool. For example 51% of people with broadband thought the internet was very influential in shaping public opinion, compared to 83% for television.

Younger respondents aged 16-24 with broadband access tended to be as positive, if not more so, than people with broadband in general, about the different roles that the internet can fulfil. They were more likely to think the internet has an important social role to play (85% agree) and that the internet can help promote understanding of different cultures, religions and lifestyles (70%) than people with broadband overall.

For many participants in the deliberative workshops, particularly younger ones, the internet was an increasingly important tool through which they accessed information. Beyond this, some young participants also felt that the

internet has the potential to work in the same social capacity as the television; they mentioned social networking sites such as MySpace and Facebook and how these served to bring them together with others in their peer group.

### **Attitudes towards television compared to the internet**

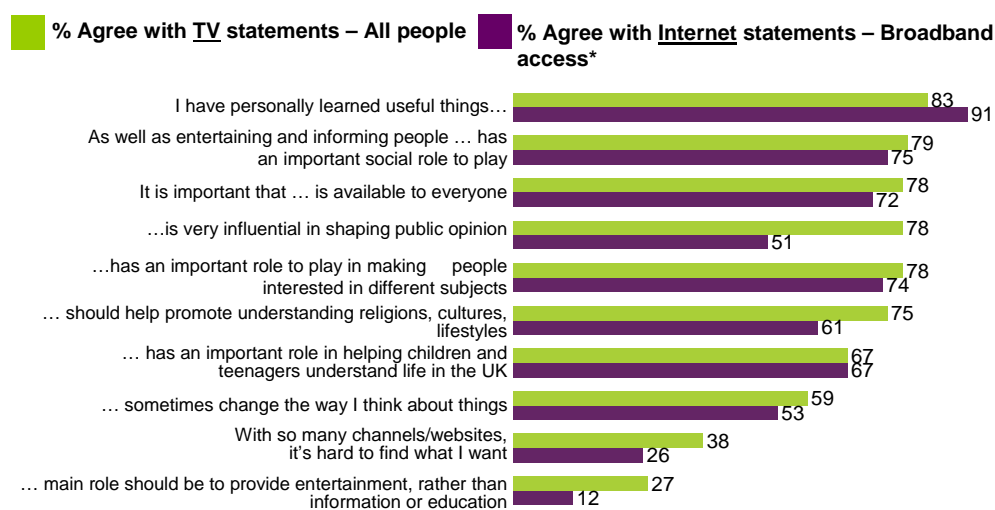
Comparing public opinion across the two platforms, television is seen to have a more important social role to play than the internet, especially among the general public at large. In particular, television is thought to have a greater role in promoting understanding of different religions, lifestyles and cultures. Almost twice as many people feel that television is very influential in shaping public opinion as say the same of the internet. It is also seen as a relatively more important source of entertainment than the internet. On the other hand, as noted above, when we look at the views of broadband users, for example, the gap between TV and the internet decreases (although does not disappear completely). For example, among this group there are high ratings for the internet as a platform for personal learning.



The two platforms share certain characteristics. In particular, they are both seen as sources of learning and information. There is also high support for universal access to both, and both are seen to have a role in helping children and teenagers understand life in the UK.

Figure 3.4: Attitudes towards television and the internet

Q14 & 15 To what extent do you agree or disagree with the following statements about television/the internet



Source: 2,260 UK adults aged 16+, October - December 2007. \*Base: 946

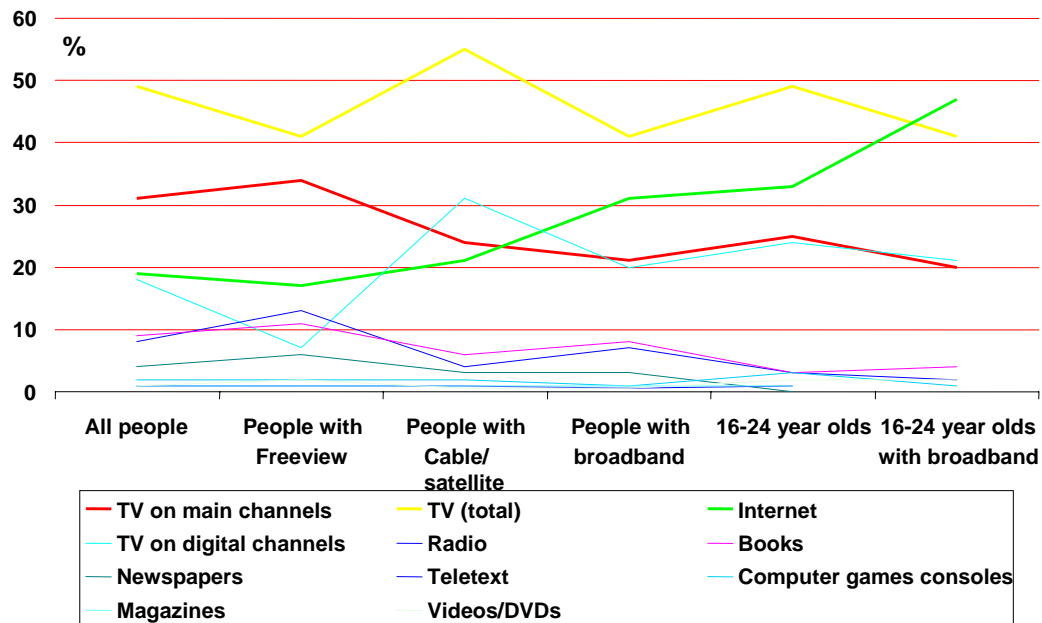
### 3.5 Media attitudes and usage

#### Attitudes towards different media platforms

The quantitative study asked which form of media platform people would find it hardest to live without – choosing between the main TV channels, digital TV channels, the internet, radio and others. Overall, and despite growing use of the internet and other digital media platforms, almost one third of people (31%) said that they would find it hardest to live without the main television channels, backing up findings of its continued importance in people's lives.

Figure 3.5: The medium people would find it hardest to live without

Q13. Which of these, if any, would you find it hardest to live without?



Source: 2,260 UK adults aged 16+ by platform access at home, 613 ints 16+ with Freeview, 1,054 interviews 16+ with broadband access, 1,186 interviews 16+ cable/satellite

This was followed by just under one in five people saying they would find it hardest to live without the internet (19%) and TV on the digital channels (18%). Combined, almost half of the public say they would find it most difficult to live without either TV on the main or digital channels (49%).

Again, however, a closer look reveals the growing importance of newer mediums amongst younger people. Young people aged under 35 are significantly more likely to say that they couldn't live without the internet than either TV on the main channels or digital channels. Internet dependence decreases rapidly with age, with only 9% of 55-64s saying they couldn't live without it and 3% of the over 65s.

The older age groups are more likely than the general population to prefer traditional media – fifteen percent say they could not live without books, and 13% of the over 65s choose radio as the medium they could not do without. These age groups are also more likely to favour newspapers. Despite this wider distribution of choice, the main television channels are still the most popular choice for these age groups (36% among 55-64s and 42% among the over 65s).

These differences are likely to be linked to the level of access to different media platforms that people enjoy. As could be expected there is a spike in those saying they would find it hardest to live without the main TV channels

among those who only have access to them. Almost half of this group (47%) say they could not live without the main television channels. This proportion falls among those with Freeview<sup>4</sup> (although it is still the highest figure), and for those with cable/satellite, TV on the main channels (24%) is surpassed by TV on digital channels at 31%.

Internet access also informs opinion on which media source people would find it hardest to live without. Those with broadband access are more likely to cite the internet (31%) than either the main TV channels (21%) or digital TV (20%). Among daily internet users, the figure rises to almost two in five saying they could not live without the internet (39%).

### **Media usage for different media needs**

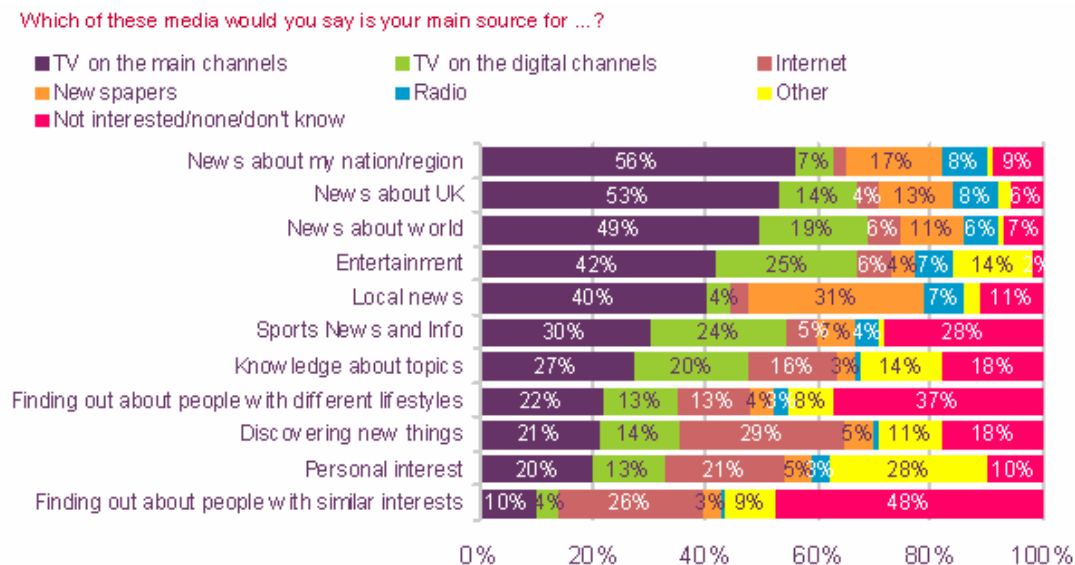
Viewers are increasingly accessing content in a variety of ways, using a variety of different platforms. However, the main five channels remain the most popular method overall. During the deliberative research, evidence of a strong sense of familiarity and trust with these channels emerged. Many recounted how they had grown up watching, for example, the BBC and, therefore, this dictated how they currently watched television. It was also felt that the main five channels provide a variety of programming content. While the different channels had different associations and expectations (and this is discussed in more detail in section 5.3), the main five channels were not seen as providers of specialist or niche programming but, instead, offered viewers real choice. Because of this, many believed that within these main five channels they would always be able to easily find something that they wanted to watch.

Findings from the 2007 quantitative survey back this up. Figure 3.6 shows results from asking respondents were asked which different media they used as a main source for different types of media interests or needs.

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<sup>4</sup> The examples given for digital channels included a mix of the main broadcasters (eg BBC Three, E4), and commercial digital channels (eg Sky One, Living), which may help to explain why the figures for Freeview households not being able to live without digital channels are low – though they are still higher than those for analogue only households.

Figure 3.6: Main media source for different media needs



Source: Q12: 2,260 interviews 16+, October-December 2007

TV on the main channels is the most popular main source for most content, in particular for the news - 56% use TV on the main channels for news about their region/nation, 53% for news about the UK and 49% for news about the World. Two in five (42%) use the main TV channels for entertainment, and for news about the local area (40%). Despite the continued dominance of the main channels, the internet and digital channels are providing people with different types of content. It is these changes on which the report will now focus.

### TV on the main channels compared to digital channels

Digital channels are beginning to make a real impact on people's viewing habits. Although TV on the main channels remains the main source for most content, a significant minority are naming the digital channels as their main source for many different types of programmes, for example, UK and world news (14% and 19% respectively), entertainment (25%) and knowledge about topics (20%).

This differs depending on TV platform. For viewers with cable or satellite television the digital channels are their main source for entertainment, sport and knowledge about topics such as art, science, nature and history, although they are still most likely to switch on to the main TV channels for news about the UK, the world, their region/nation and their local area. On the other hand, people with Freeview continue to use TV on the main channels as their main source for most content, although as we would expect usage of digital channels does rise among this group.

It emerged during the deliberative workshops that accessing information via Freeview or cable and satellite was more popular amongst certain groups than others. Accessing content in this way was particularly popular among those that had families; they stated that they felt less constrained by the traditional schedules of the main five channels and, instead, could watch what they wanted when it was convenient for them to do so. A common example given here was the news; participants stated that when the news was shown at six o'clock, they were often spending time with their families. However, once their children were asleep, they could then catch up with the latest developments via one of the digital news channels.

Young people were also attracted to the digital channels – not only were they perceived to provide an alternative voice (More 4 News etc.) but provided cutting edge, niche programming that the main five channels did not (naming BBC Three, E4 among others).

Older, retired participants of the higher socio-economic groups also tended to be more confident with accessing content through the digital channels. They spoke of how, now that they had more free time, they wanted a greater choice in what they watched and also wanted to be able to access specialist channels so they could concentrate on the issues that interested them. A common example given here were those that took out a subscription to enable them to access Sky Sports or Sky Movies. Generally though, this group were less keen on accessing content via this platform and the issues for this will be discussed in detail in section 6.2. Instead, they used more traditional forms of media, such as newspapers and the radio, as alternatives to the main five channels. This was perceived to provide an alternative viewpoint for them and, therefore, enabled them to make their own minds up on the key themes and issues of the day.

The quantitative survey results show that television on the main channels, perhaps unsurprisingly, still remains strong with the older age group. Older people, (those aged 65+) are more likely to watch TV on the main channels for all programme types. Use of digital channels or the internet for different media interests is relatively low among this group.

In general, however, some commercial digital channels, such as the Discovery Channel and Sky News, were seen to provide programmes which struck a good balance between being educational while, at the same time, providing entertainment. They were also praised for having high production values.

### **TV on the main channels compared to the internet**

The deliberative workshops and the quantitative survey both found that for the main people use the internet in different ways to television and it fulfils different needs and interests. The quantitative survey findings (see Figure 3.7) show that the internet is the main source people to turn to for:

- Discovering new things (29% say they use the internet for this compared with 21% who use TV on the main channels and 14% on digital channels).
- Finding out about people with similar interests to themselves (26% citing this source compared with 10% who say they use the main TV channels and 4% on digital channels).
- Finding out about things that are of personal interest; a fifth (21%) say they use the internet for this (compared to 20% on the main TV channels and 13% on digital channels).

Young people are also far more likely to name the internet as their main source for these media needs outlined above. For example, nearly three in ten young people (29%) use the internet for their personal interests and pastimes compared with two in ten overall and just 5% of older people (aged 65+). In addition, younger people are more likely to name the internet as their main source for knowledge about different topics (23%) compared with 17% for TV on the main channels and 18% for TV on digital channels. Internet usage varies by age, with it decreasing as people get older.

Both the qualitative and quantitative findings show that, unsurprisingly, there are variations in the use of media platforms among those with internet access compared with those who do not have access to this technology. People with broadband are more likely to name the internet as their main source for different media needs. The internet is the most popular main source for discovering new things (49%), finding out about people with similar interests (42%), personal interests (35%) and knowledge about topics (27%). However, TV on the main channels remains the most popular source for all types of news and for entertainment.

How people are consuming varies dramatically with age. It is within the younger groups that the internet is opening up new opportunities and choices. It is perhaps confirmatory rather than revelatory to find that younger people, (16-24 year olds) are less likely to watch TV on the main channels for news of all kinds (local, regional/national UK, and international), entertainment, knowledge about topics and sports news compared with all viewers, and are more likely, although not significantly so, to make use of the internet for these types of need compared with the population as a whole. Even so, TV on the main channels is still more popular as a main source for all types of news and for entertainment in comparison to the internet.

Younger participants (and, in particular, those in their late teens and early twenties) in the deliberative research actively explored a range of other possibilities for their entertainment. In particular, many spontaneously mentioned how they used sites such as *YouTube* to access content. This allowed them to view clips from programmes previously broadcast on television which they had missed when they were originally shown or wished

to see again. Another benefit of sites such as this was that it enabled participants to view user generated content. This, they felt, provided alternative perspectives to the television on current themes and issues and were also entertaining clips that they were able to share with friends. There were, however, some issues expressed in relation to quality and trust. Those that viewed content via this medium recognised that, often, it was not professionally produced or edited and, therefore, this could negatively affect the viewing experience. Along with this, a few stated that the views expressed were subjective and, therefore, needed to be treated with caution.

Video on demand services such as 4oD were another means of accessing content among the younger, more technologically aware participants. The real perceived advantage of this was the ability to view what they wanted at a time convenient to them. These participants were not constrained by their perceptions of what computers and the internet could be used for. Among the older participants, there was a sense that these tools were for work and educational purposes only. However, while the younger participants realised their value in this regard, they also felt strongly that computers' use is wider than this and that they are also a prime tool for entertainment.

Similarly, a few younger participants mentioned downloading clips or episodes of their favourite programmes from websites which they could then watch on their iPod. While the cost of doing this was, at times, mentioned by participants as a drawback, the convenience of being able to access content while 'on the go' was welcomed. This was particularly important to younger people who felt they had a number of demands on their time; not only were they either in education or employment but, also, they had busy social lives which meant that traditional scheduling on the main five channels did not always suit their needs.

Among the younger participants in particular, the internet was also seen as a means of socialising. Social networking sites such as MySpace and Facebook were commonly cited as means for them to stay in touch with friends and make new ones with whom they held common interests.

Although younger participants in particular were exploring different means of accessing media content, they still watched and appreciated the main and digital television channels. In this sense, the younger participants still held a traditional view about the role of television. They were, however, more open about exploring new possible ways to access content and, also, were more technologically skilled to enable them to do this easily.

It should be noted that, for the majority of participants who were confident with the internet, using it to access content which would otherwise be found on the television was very much a secondary function. In the main, the internet was used as a means of **socialising, education and self improvement, finding out information and communication.**



## Comparison of 2003 and 2007 media sources for different media needs

Comparisons with a similar study in 2003, which should be treated with a certain amount of caution due to changes in methodology and wording, support the view that TV is being used slightly less since 2003 for entertainment, knowledge about topics such as art, science nature and history Figure 3.7 shows an increase in usage of the internet for different media interests, in particular personal interests and knowledge about different topics, although TV is still more popular overall in this area.

Figure 3.7: Comparison of media usage by platform, 2003 and 2007

|   | TV** |      | Internet |      | Radio |      | Press |      | Magazines |      |
|---|------|------|----------|------|-------|------|-------|------|-----------|------|
|   | 2003 | 2007 | 2003     | 2007 | 2003  | 2007 | 2003  | 2007 | 2003      | 2007 |
| Entertainment   | 71   | 67   | 1        | 6    | 3     | 7    | 1     | 4    | 2         | 2    |
| News about the UK*  | 55   | 67   | 1        | 4    | 12    | 8    | 22    | 13   | 0         | *    |
| News about the world*   |      | 68   |          | 6    |       | 6    |       | 11   |           | *    |
| News about your reg./nation*                                    | 37   | 63   | 1        | 2    | 10    | 8    | 36    | 17   | 1         | 1    |
| News about your local area*                                     |      | 44   |          | 3    |       | 7    |       | 31   |           | 2    |
| Your personal interest*   | 23   | 33   | 1        | 21   | 3     | 3    | 6     | 5    | 27        | 9    |
| Knowledge about topics such as art, science, nature and history | 58   | 47   | 3        | 16   | 2     | 1    | 2     | 3    | 3         | 3    |
| Sports news and information                                     | 51   | 54   | 2        | 5    | 8     | 4    | 15    | 7    | 1         | *    |
| Finding out about people with similar interests to you          | n/a  | 14   | n/a      | 26   | n/a   | 1    | n/a   | 3    | n/a       | 4    |
| Finding out about people with different lifestyles to you       | n/a  | 35   | n/a      | 13   | n/a   | 3    | n/a   | 4    | n/a       | 4    |
| Discovering new things  | n/a  | 35   | n/a      | 29   | n/a   | 1    | n/a   | 5    | n/a       | 4    |

\* In 2003 the survey asked 'News about Britain and the World'. 'Information about my area/region', 'features about my personal interests and pastimes'

\*\* A combination of 'TV on main channels' and 'TV on digital channels', not directly comparable to 2003 which asked about TV overall

Source: Q12: 2,260 interviews with UK adults aged 16+, October - December 2007, PSB survey 2003

### 3.6 Watching TV on the main channels

#### Are people watching more or less of the main TV channels?

Given the rising usage of other platforms, especially amongst the young, it is informative to see whether people think they are watching more or less on the main channels. As part of the quantitative survey, respondents were asked whether they were watching more, less, or about the same amount of TV on the main channels as they were four to five years ago. Nearly four in ten (39%) say they are watching less, while 17% say they are watching more.

If some people say they are watching less television on the main channels, the question remains why this is so. Of those people who say they are watching less TV on the main channels, one in three say they have less time to watch TV generally now because they are too busy or have had a change in circumstance, while 27% say they watch more of digital channels instead. Nearly one quarter, 23%, say they don't find the programmes as enjoyable /interesting as they used to, while one fifth, (20%) say they use the internet more.



Again, responses vary between the demographic groups. A closer inspection of the figures reveals that young people and families with children in the household, those with broadband access and daily internet users are most likely to claim to be watching less TV on the main channels, with around half of each of these groups claiming they are watching less.

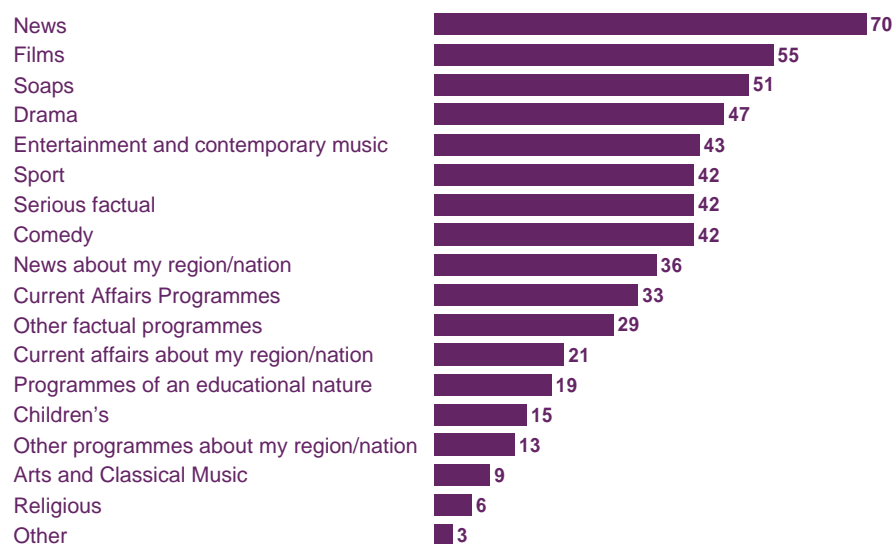
However, three in ten of the over 65s say they are watching more TV than they did four to five years ago, and only one quarter, 26%, say they are watching less. This could be down to them having more time on their hands having raised families and retired.

### What people are watching on the main channels?

As part of the quantitative survey, respondents were asked which types of programme they watch regularly on the main TV channels. News, films and soaps are the most popular, with seven in ten (70%) saying they watch the news, over half (55%) watching films, with 51% saying they watch soaps.

Figure 3.8: What programme types people claim to watch on the main channels

Q6. Which of the following types of programmes, if any, would you say you watch regularly on the main TV channels?



Source Q6: 2237 interviews with UK adults aged 16+ with TV in the household, October - December 2007

5

However, claimed viewing habits vary, particularly by age. Older people are more likely to say they watch most programme types on the five main TV channels than younger people, which may reflect their greater reliance on the main five channels.

Older people are also more likely to say they watch current affairs (47% vs. 12%) and the news than young people (83% vs. 39%). This is also true of drama (52% vs. 39%), serious factual programmes (52% vs. 21%), news about the nation/region (47% vs. 15%) and other programmes about the nation/region (19% vs. 5%). People in the devolved nations are more likely to say they watch programming about their region/nation other than news (In Scotland 32% say they watch programmes about their region/nation, Wales 25%, Northern Ireland 16% compared with 13% overall)

### **Overall satisfaction with TV**

Despite the growing importance and usage of the internet, and perhaps in part because of the increased usage of digital channels, overall satisfaction with TV remains high. Nearly eight in ten of those asked in the quantitative survey (79%) say they are satisfied with all the TV that is available as a whole. Although some caution needs to be given to interpreting change since 2003, satisfaction levels appear to have increased from 61% of people being satisfied overall in 2003 compared to 79% in 2007. These overall ratings have risen across all key demographic subgroups (age, sex, social class) and by platform access.

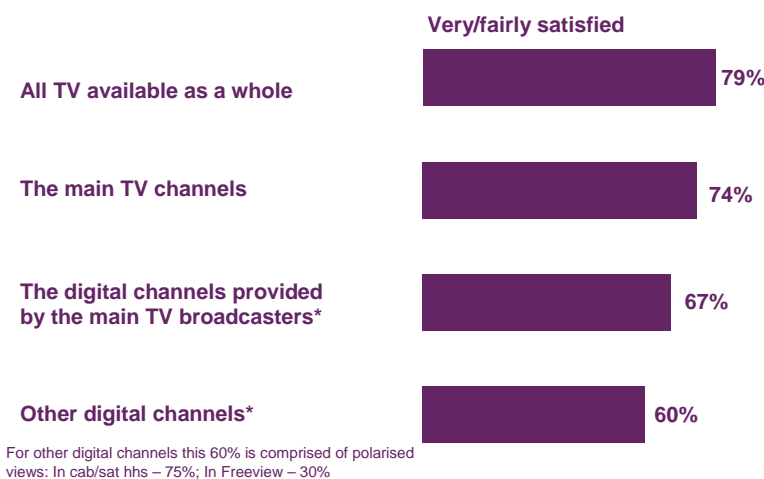
Satisfaction ratings are also high for all the different TV platforms, but slightly higher for the main TV channels (74%). Among people with multichannel just over two thirds of people are satisfied with digital channels provided by the main TV channels and 60% are satisfied with other digital channels. However, satisfaction with 'other digital channels' varies by TV platform. Three quarters (75%) of people with cab/sat television were satisfied with 'other digital channels' and these levels of satisfaction were as high as for the main TV channels (cable and satellite viewers are most likely to be satisfied with TV as whole- with 85% saying so, which perhaps is a reflection on the wider choice that they enjoy). Among people with Freeview only 30% claimed to be satisfied with other digital channels. However, this is partly also a reflection of the higher proportions of people saying "don't know" in response to the question about 'other digital channels'.<sup>5</sup>

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<sup>5</sup> 44% of people replied 'don't know'. This is probably due to the question 'How satisfied are you with other digital channels such as Living, Sky One, Sky Sports, Sky News etc' None of these channels were free to air and therefore not available to those with Freeview.

Figure 3.9: Satisfaction levels with Television

Q44 How satisfied or dissatisfied are you with...



Source Q44: 2,260 interviews with UK adults aged 16+, October - December 2007  
\*1,799 those with multi channel TV only

Satisfaction levels vary among different age groups. Young people, despite claiming to watch less television than older people, are more likely to be satisfied with TV as a whole (85%) and also tend to be more satisfied with other digital channels (68%). They are also satisfied with television on the main channels (79%). Levels of dissatisfaction with the main TV channels are highest among older people who are also less satisfied with digital channels and with television as a whole.

## 4. The role of Public Service Broadcasting in society

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This section of the report examines attitudes towards PSB. First, it investigates opinions on what constitutes PSB. It looks at how important or otherwise it is that programmes are made in the UK and whether programmes should have mass appeal or appeal to different audiences. It then looks at participants' attitudes towards each programme type and what people's priorities are. Finally it considers how important plurality is on the main five channels.

When thinking about the purposes and characteristics of programmes with a social value, of utmost importance to participants was that they were **well-made, high-quality productions** which could 'stand out' from the rest. Many also believed that it was important that programmes with a **social** value are entertaining in order that people want to watch them.

That programmes are **inclusive** was also seen as key. Participants recognised that society is increasingly diverse and, therefore, felt it important that there are programmes to cater for the different needs and interests within the UK today. Related to this, many thought that the programmes should reflect the issues where they lived. This varied between regions and nations. News and current affairs programmes about the region/nation are more important to viewers in the devolved nations than in the UK as a whole, but remain a priority for all

When discussing the different types of programmes that could be classed as PSB, the **news** (both UK Network and regional/national), **current affairs** and **serious factual** programmes were often regarded as being **most important**. Participants viewed these programme types as being their window on the world and, given the pace with which they felt society is changing, these programme types were seen as having an increased relevance today. Among parents, **children's programmes** were also seen to be important by a large majority.

When asked in the quantitative survey to name their top 5 priorities for them and their families, the news was most popular with 69% claiming it was a top 5 priority. Not surprisingly, however, age has an effect on personal priorities for TV content; viewers over 24 years saw news as more valuable than younger people, while younger people tended to favour films and soaps. When asked to consider priorities for society as a whole, however, there was only a small variation between age groups with news, current affairs and serious factual programmes seen as the three programme types with the highest levels of support among all age groups.

It was widely agreed in both the deliberative workshops and quantitative study that PSB should be widely available. When asked in the quantitative survey

how important it is that each programme type is shown on the main channels, **news, current affairs, regional/national news and current affairs and serious factual** programmes were the programme types which gained the highest levels of support. A clear majority of parents also thought that Children's programmes made in the UK were important.

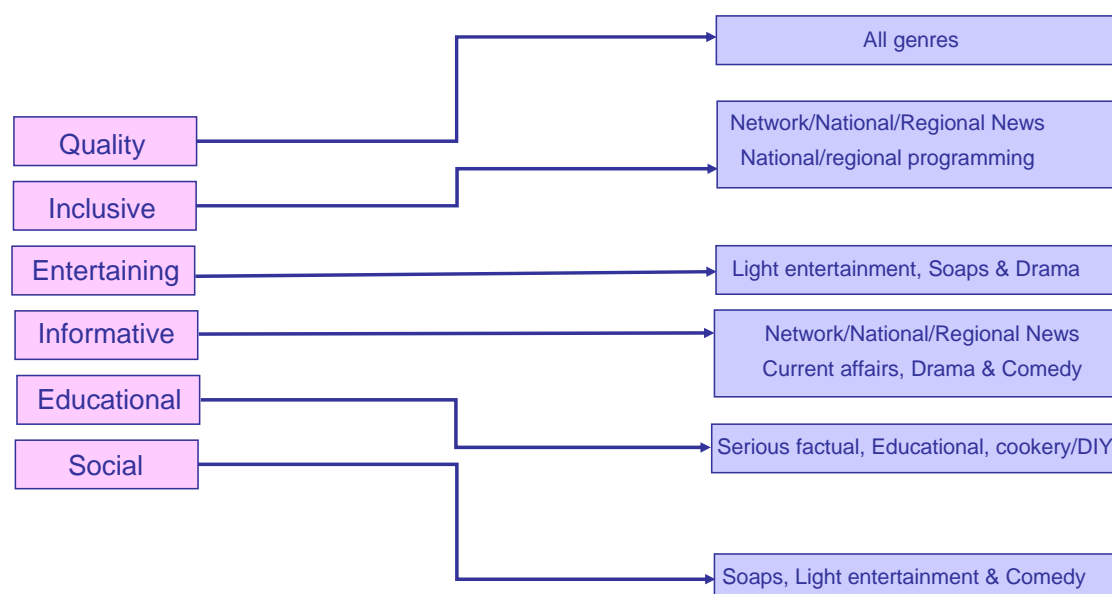
For many, **UK content in PSB was seen as key**. Not only were UK broadcasters trusted but, furthermore, participants felt that they would be able to accurately and credibly tap into the concerns and issues facing UK society today. However, there were some participants who thought that programmes from overseas also contributed to PSB; it was felt that this would help raise quality within the UK and would also help educate people in other opinions and cultures. In the quantitative study a majority wanted to see a high proportion of programmes made in the UK on the main channels, but a relatively large minority felt that the emphasis should be on receiving the best TV programmes from abroad. The importance placed in the origin of the show changed depending on the genre. People thought it most important that news is made in the UK, followed by current affairs, regional/national news and serious factual programmes, which also reflected their overall perceived importance to society. A majority of parents thought children's programming made in the UK was also a priority.

**Opinion was polarised on the issue of whether PSB should cater for the majority or different audiences.** On the one hand, participants were concerned with their own viewing enjoyment and believed their personal needs would be better met by programmes which catered for the majority. On the other hand, however, participants stated that the broadcasters have an obligation to meet the needs of the different audiences living in the UK today. They felt this would help challenge conventional thinking and educate people about a wider range of issues. Also, given that *everyone* pays the licence fee, some felt that all groups in society should have programmes tailored to their needs.

## 4.1 Defining PSB

The deliberative workshops explored people's ideas about what constitutes Public Service Broadcasting for them, its purposes and characteristics. To help come to a definition of what PSB is, participants were presented with a series of stimuli to prompt thought and debate on the issue. Participants felt that programmes should be well made, inclusive, informative and educational, and have a social aspect. A summary of their views can be seen in Figure 4.1 below. Underlying these purposes was the strong support for UK content that was seen to have the ability to include different viewpoints from around the UK. The report will now consider each of these aspects in greater detail.

Figure 4.1 – Participant perceptions of the purposes and characteristics of PSB



## High quality

Firstly, it was widely agreed in the deliberative research that productions should be **well made** and **quality**. Because viewers now enjoy a wide range of choice, through digital channels and the internet, participants felt it was important that PSB programmes are made to the highest possible standard. Programmes that can benefit

*There was a programme about the Great Wall of China – great for the average person to see what life is like a long way away*

*Edinburgh*

society need to stand out from the crowd as people need an extra ‘incentive’ for people to watch. To illustrate how this is currently achieved, participants cited serious factual programmes and current affairs programmes such as *Dispatches* and *Cutting Edge*. These were not only felt to be well produced but, moreover, were seen as being an excellent example of investigative journalism which could open up people’s minds to new ways of thinking.

*‘The Week’ proves that programmes can be both educational and entertaining. If you want to convey an idea put it simply not convoluted*

*London*

Aside from this, others praised the quality of the scriptwriting and the acting in many of the UK soaps, *Coronation Street* and *EastEnders* in particular. Others referenced comedy programmes, such as *Little Britain*, and mentioned how these are innovative and groundbreaking in their approach. Some people cited dramatic productions, such as *Bleak House* and *Wire in the Blood* as being a quality, entertaining programme that, at the same time, educates.

## Inclusiveness

That programmes with a social value are **inclusive** was also mentioned as a key attribute by a large number of participants. Participants in the deliberative

*The things that are important to society are in the minority. I mean, is anyone really going to sit down and watch the religious programmes? Most people watch TV to be entertained*

Belfast, BC1C2

research recognised that, given how society is becoming increasingly diverse, the programmes shown need to reflect and cater for this. Doing this was seen to have a dual

purpose. Firstly, people could become informed and educated about cultures, lifestyles and views which were different to their own. It was thought that this would generate a level of understanding which, in turn, would help promote tolerance and respect.

Secondly, many participants felt that PSB should portray the issues affecting the areas of the UK in which they lived. There was a sense from many of those that participated in the deliberative research outside London that, currently, the UK Network News did not meet this need; many felt the issues portrayed here to be London-centric due to the concentration on Westminster-related stories. Interestingly though, those in London did not feel the same way and instead believed that the UK Network News was very nationally focussed and, while the stories themselves might emanate from Westminster, the ramifications of them affect the whole of the UK. To this end, they also saw the need for regional programming about London.

This need for regional/national representation extended beyond news programming. It was also considered important that regional/national issues are portrayed in other programme types, in particular soaps and dramas. This view was particularly strongly held in Birmingham. Participants felt that they live in the UK's second city and that the

*Birmingham is a multi-cultural thriving city but this is not shown on TV*

Birmingham,

city itself has much to offer; a multi-cultural population with thriving communities along with a strong industrial heritage. They also cited the recent changes in the city, such as the regeneration around the Bull Ring, as being examples of how Birmingham is changing for the better. However, there was a strong sense that these developments are not being portrayed to the UK as a whole and, therefore, people outside of the city itself have outdated perceptions of what it means to live in Birmingham.

## Entertainment

Participants also felt it important that PSB programmes are **entertaining**. Similar to the arguments about quality, there was a belief amongst many in the deliberative workshops that, with increased choice, it would be much easier for some people to ignore those programmes which have a social value and, instead, watch those whose remit is purely to entertain. While the majority of participants did not disagree with an individual's right to make this



choice, there was a strong sense that, if this were the case, these people would be missing out on potentially learning about the world around them.

It was also believed that programmes which come across as being overtly concerned with providing some kind of social value may intimidate viewers. Indeed, younger participants stated that they would not be likely to actively choose to watch a programme which they believed might bill itself as being educational. Therefore, in the interests of these programmes reaching out to as many as possible, it was believed that they need to tread to a fine line between providing social benefit on the one hand but, also, being entertaining to watch on the other. Indeed, few participants thought that these two concepts should be treated as mutually exclusive and believed that the broadcasters need to make more of a concerted effort to marry the two together.

*If everything was PSB, people wouldn't stand for it – they'd be bored to tears. A lot of it is violence and sex, and people like it*  
Durham

Related to this, many participants maintained that television's primary function is to entertain and that any educational benefits derived from programmes are

*I like to watch TV with my feet up. It helps me relax at the end of the day after sitting looking at a computer*  
London

an additional extra rather than its sole purpose. Therefore, that issues affecting society past and present are presented in a way that is pleasurable to watch was deemed as being very important. This was particularly voiced

by those with families and young professionals. There was a sense from these participants that their viewing time is *already* limited due to the other demands they have on their time and, given that the television plays a key role in their leisure time and how they unwind, that they are able to watch programmes that are entertaining was essential to this group. A very small number of participants felt that television did not need to educate *at all*.

*It's got to be relaxing and entertaining. I've been to school – I don't want to learn again*  
Birmingham

Types of programmes that were particularly considered to be entertaining were soaps. Participants felt that the narrative of these programmes provided a thread by which they could become engaged. Furthermore, the quality of the acting and the script-writing was often praised. Also, many viewed this type of programme as a form of escapism. It was felt that soaps amplify the issues faced by people living in the UK today to such an extent that they do not provide an accurate portrayal of life today. Consequently, they were often viewed primarily for entertainment purposes.



## Education

Participants also felt that PSB programming should be **informative** and **educational**. This could take two forms. Firstly, some felt that it important that programmes educate by relaying facts and provable data. It was believed that by doing this viewers would be made aware of any given situation and could therefore draw their own opinions and conclusions. These included programmes such as news (both network and regional/national), current affairs and serious factual programmes.

*Documentaries are more factual.  
They give you the facts so you  
can make your own judgements*  
Edinburgh

Secondly, many participants believed that simply presenting viewpoints or case studies – irrespective of their factual basis – was sufficient and that, arguably, one can learn as much from understanding what people think and do as from understanding data and evidence. To this end, there was a strong sense that people can learn about issues affecting society today, for example, by watching soaps which tend to cover topical issues (See Soaps section later in this chapter).

Some participants felt the educational role of television stretched even further. There was a feeling amongst some that programmes traditionally classed as ‘light entertainment’ can be educational and informative. Particularly mentioned in this regard were cookery shows such as *Saturday Kitchen* and programmes hosted by celebrity chefs including Nigella Lawson and Jamie Oliver. Also included here were property programmes, such as *Property Ladder*, and those related to gardening. Participants felt that traditional educational methods can leave gaps in one’s knowledge – especially when it comes to practical skills – which television can fill. Many stated that they had learnt about nutrition and how to eat healthily from television programmes.

*Watching these means I can  
learn from the experts and  
get tips*  
Belfast

## Social

Many participants believed that the **social** aspect of television should not be understated. That people have the opportunity to watch programmes with others in their social network and, following on from this, discuss the issues with them, was considered to be important. Not only did this provide participants with an opportunity to socialise informally but, moreover, many felt they were able to learn more as a result of talking the issues through with others than simply internalising them. This was a key theme which emerged from this research and was an issue cited by the majority of participants. Consequently, many placed great

*It's nice to watch with other  
people. People who play together,  
stay together*

Swansea

importance on those programmes which can be viewed as a family, or with one's peer group. Again, soaps were mentioned as an example of this along with comedy programmes and light entertainment. They were seen as providing benefit to society; they were felt to bring people together and were something that provided a common talking point.

## 4.2 Attitudes towards PSB programme types

Having identified the purposes and characteristics which PSB should aspire to and does achieve, the qualitative research moved to examine attitudes towards different types of PSB programmes. The quantitative research assessed people's priorities for different programme types on the main channels, from both a social and personal perspective (See Figure 4.2). It also asked people how important the provision of each programme type was on the main channels (see Figure 4.3).

### **Personal and social priorities**

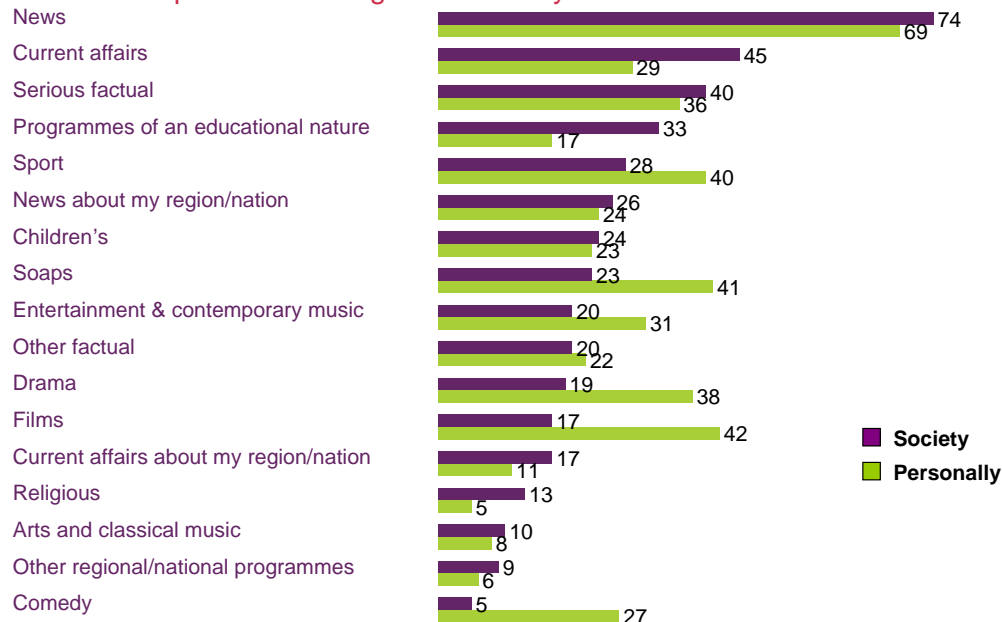
When asked in the quantitative survey to name their top 5 priorities for them and their families, the news was most popular with 69% claiming it was a top 5 priority. Not surprisingly, however, age has an effect on personal priorities for TV content; viewers over 24 years saw news as more valuable than younger people, while younger people tended to favour films and soaps. Our quantitative research shows that people's personal priorities tended to be related to the entertainment aspect of television citing films and soaps, for example, within their top 5 priorities.

When asked to consider priorities for society as a whole, however, there was only a small variation between age groups with news, current affairs and serious factual programmes seen as the three programme types with the highest levels of support among all age groups.

Figure 4.2: Respondents' personal and social priorities for the main channels

Q29 What are the five programme types you consider most important for you and your family?

Q30 What are the five programme types you consider most important for the main channels to provide for the good of society?



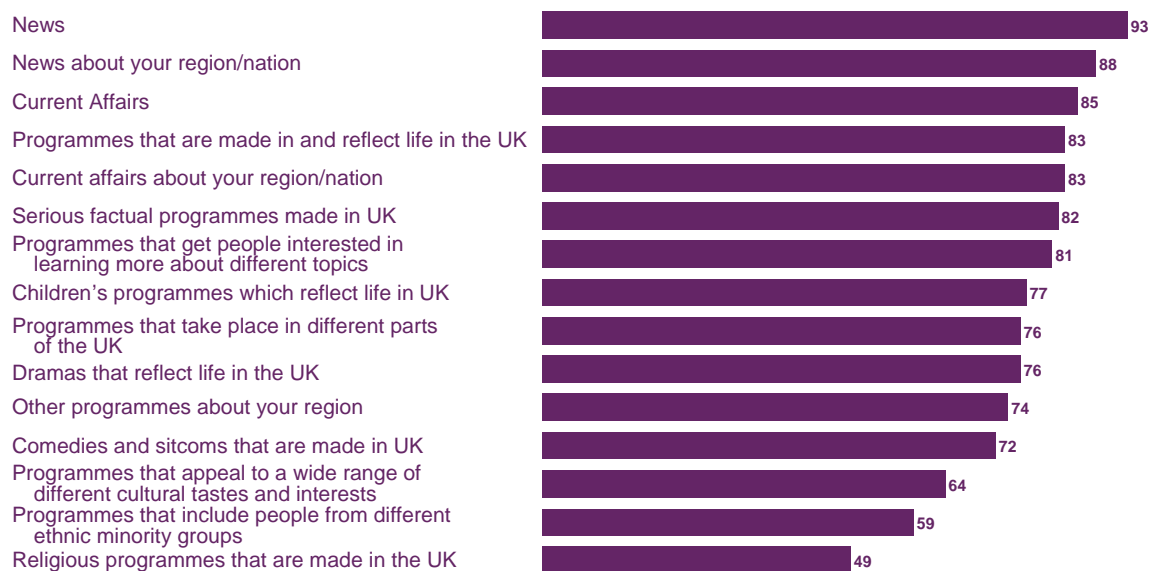
Source Q29: 2,260 interviews with UK adults aged 16+, October– December 2007

NOTE: the figures for children's programmes change among parents: 53% of those with children said children's programmes were in their top 5 personal priorities and 36% said they were in their top 5 priorities for the good of society

In the quantitative survey respondents were asked how important it is that each of the programme types were shown on the main channels as a whole. As can be seen, there is a strong desire for nearly all the PSB genres to be shown on the main channels; this was something that was also evidenced in the workshops. There was a core of programme types being seen as particularly important to the provision of PSB with news, current affairs, serious factual programmes and regional/national news and current affairs consistently come out among the most important programme types. Children's programmes were deemed of high importance among parents. Although there was variation in importance, most other programme types were seen to be important by the majority of respondents.

Figure 4.3: How important respondents think each programme type needs to be shown on the main channels as a whole

Q33 How important is it that... is shown on the main TV channels?



Source Q33: 2,260 interviews with UK adults aged 16+, October - December 2007

Religious programming is of relatively less importance, although still almost half of respondents thought it important that showing religious programming on the main TV channels is important, of whom 13% say that it is *very* important. By contrast, almost one quarter of the public (23%) say that it is unimportant for religious programming to be shown on the main TV channels.

Also of less relative importance for the main TV channels (although still seen as important by a majority overall) are programmes that appeal to a wide range of tastes and interests and programmes that include different ethnic minority groups (64% and 59% of the public say these genres are important, respectively).

There are, however, some variations by age group. Young people – particularly those aged between 16 and 24 – are less likely to say that it is important that some key PSB genres are shown on the main TV channels compared to the overall population, in particularly news, current affairs and serious factual (reflecting their other views and behaviour towards these programmes noted earlier). For example, whilst 88% of those aged over 65 say it is important that current affairs about your region/nation are shown on the main television channels, the figure amongst the under 24s is 73%. That said it is clear that the majority of young people think that provision is important.

However, the under 24s are more likely than the general population to think it is important that the main channels as a whole show two PSB genres – comedies and sitcoms made in the UK (82% of 16-24s, compared with 72% of the public) and programmes that include different ethnic minority groups (67% of young people, compared to 59% of the general public). These programmes are also seen as particularly important for ethnic minority viewers (72%, who it should be noted also share a younger age profile), and they are also more likely to prioritise programmes that appeal to a wide range of different cultural tastes and religious programmes.

Older people – particularly the over 55s – place more importance on news programmes than the population as a whole, both for the whole of the UK and at regional or national level. They are also more likely to value current affairs and serious factual output.

Those from the social group ABC1 are more likely than the C2DE social group to think it is important to broadcast serious factual and current affairs programming on the main TV channels. Nine in ten from the ABC1 social group (90%) say it is important that current affairs programming is shown on the main channels, five percent higher than the general public as a whole. Those from social groups C2DEs are less likely to be interested in religious programmes and programmes that include different ethnic minority groups.

In addition, there is generally little difference between the public as a whole and those who have access to digital and satellite television when thinking about which genres should be shown on the main channels. Only for serious factual (79% compared to 82% overall) and religious programming (46% compared to 49%) did significantly fewer people feel it was important to be broadcast on the main channels.

Across all of the workshops, it was UK network news, national/regional news, current affairs and serious factual programmes that were consistently mentioned by participants as being central to the provision of PSB. When thinking about the programmes which fulfilled a key function in society, it was those which tended towards the factual rather than the fictional which were felt to be most important and which provided increased opportunities for people to learn about the world around them.

Attitudes to each programme type are discussed in detail overleaf.

## UK network news

**UK network news** was seen to be the most important form of public service broadcasting by both the qualitative and quantitative research. During the deliberative workshops the majority of participants felt that it is very important

*I enjoy watching the news. It's nice to sit down and see what's happened in the world and your local area*

Birmingham

to keep up to date with the latest developments from the UK and further afield. Indeed, for the majority of people who took part in the workshops, the UK network news provided by the main five

channels was their prime means of accessing information about the state of the world today. They believed that, by doing this, they would have a deeper insight into the issues shaping society today and that, as a consequence, could better understand the people around them.

This view is supported by the quantitative research. When comparing the programme types people see as social and personal priorities, news comes out clearly top in both. As shown in Figure 4.2 three quarters of people (74%) feel that news is the most important programme type for the main channels to provide for society as a whole. A similarly large amount (69%) claimed that news was the most valuable to them to them and their family.

Throughout the quantitative study and the deliberative research, news also emerges as the programme type which the public most strongly associate with public service broadcasting. Over nine in ten members of the public (93%) feel it is important that news was shown on the main TV channels. Almost nine in ten members of the public (87%) agree that it is important for each of the main TV channels to broadcast at least one news programme during peak viewing hours (6pm – 10.30pm).

The centrality of news to PSB has not been diminished by the emergence of other platforms, such as digital channels or the internet, although provision on these platforms is important to a minority. The majority of the public do not feel that dedicated news channels are able to replace news on the main channels. Only 24% agree that dedicated news channels mean there is less of a need for news content on the main television channels. Among people with Freeview 21% agree and among people with cable satellite this rises slightly to 27%. Even fewer agree that the internet is a better source of news than the main TV channels, with only around one in five people (19%) agreeing with the statement. Even fewer of those with Freeview agree (15%) but among those with cable or satellite 23% agree. However, younger people (33%) and those with internet access (26%) are more positive about the internet as a news source compared with the main TV channels.

Beyond this, the UK network news was felt to create a sense of community. By making themselves aware of the major stories affecting the world and the UK, participants in the deliberative research stated that they felt 'a part of something' and believed themselves to be more connected to the world

around them. Because of this, it was generally felt in the deliberative research felt that it was important for *everyone* to watch the UK network news. Additionally, there was a strong sense that in recent years the UK network news has increased in importance. Participants felt that the pace of societal change is now so quick that it is necessary to watch the news so one does not lose track. Furthermore, participants felt there are many new challenges facing the UK, of which terrorism was the most frequently mentioned. However, there was a sense that the issues related to this are easily misunderstood. Those participants living in diverse communities (in particular London and Birmingham) mentioned this and, in relation to terrorism, spoke of the negative effects on the Muslim community as a result. These participants tended to believe that the UK network news has the potential to help portray a more balanced view and, therefore, avoid common misperceptions.

*The news is very informative – it is always something you should watch. It informs you, tells you of the current affairs, and that is why it is important*

Durham

There was, however, some understanding as to why people might not want to watch the news; participants stated that the serious style of reportage might intimidate some viewers and that the concentration on negative stories was at

*The news can be a tool for the Government*

Edinburgh

odds with the need some felt to use the television primarily as a means of entertainment and relaxation. Many also thought that there are other means of accessing information about the state of the

world today. These included the internet, which was particularly used by the younger participants, the radio and newspapers. Not surprisingly, the quantitative research supports this; older viewers are more likely to see news as important than younger viewers. That said, still a majority of younger people think that news on the main channels is important. In the deliberative research some participants who used the internet regularly also appreciated the different viewpoints on news that they could source from a variety of websites around the world.

## National/regional news

Both the quantitative and qualitative studies found that regional/national news was a key part of PSB provision on the main channels and was the overall priority in terms of regional/national programming provision.

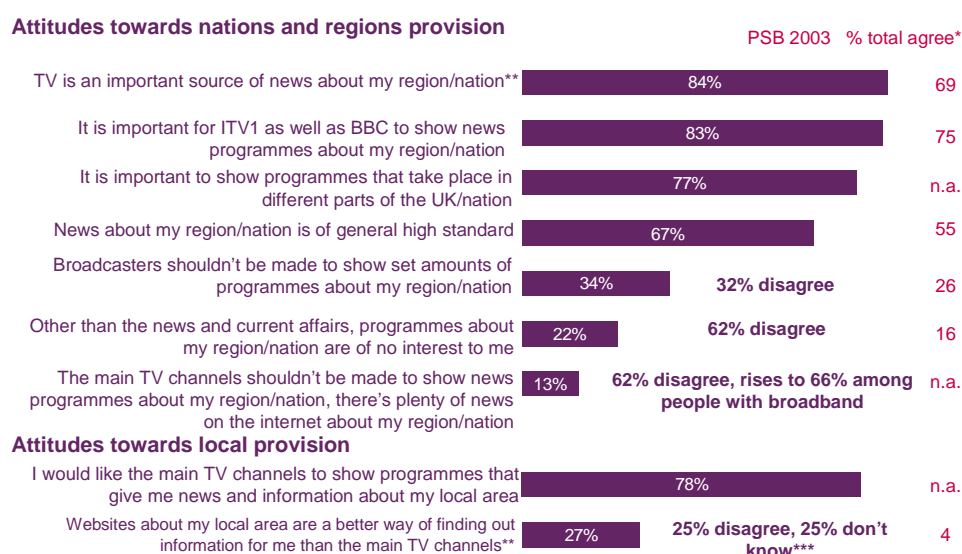
Regional and national news emerged in the quantitative research as of high importance in the overall ranking of PSB genres (See Figure 4.2), with 88% of people thinking it important that it is provided on the main channels. Respondents were also asked to name their top five priorities for programming from a personal and social perspective. Although regional/national news did not feature highly as a personal priority it ranked sixth as a social priority. Furthermore, as Figure 4.4 shows, 84% of people see television as an important source of news about their nation/region, and



83% feel that such programmes should be broadcast on both ITV1 and BBC. This shows a rise since 2003, although a slight change in the wording of the questions means that that is not statistically robust.

Figure 4.4: Attitude statements about nations and regions provisions

Q39-41 To what extent do you agree or disagree with the following statements about...news about your region? Programmes about your region aside from news and current affairs? Information about your local area?



Source PSB Quant Q39-Q41: 2,260 interviews with UK adults aged 16+, October - December 2007

\* Source: PSB Quant 2003 – please interpret any changes over time with caution – see Section 2 for details

\*\*Question wording varied slightly in 2003. Interpret with caution

\*\*\* Among people with broadband results are 40% agree and 28% disagree

As would be expected, there are variations in the way that different groups of people view regional and national content. Older people and those in the devolved nations are more likely to value television as a source of regional or national news. As Figure 4.5, below, demonstrates, nine in ten people from Scotland (90%), Wales (91%) and Northern Ireland (95%) agreed television is an important source of information about their region or nation. The figures are similarly high for the over 65s (90%). The same groups of people are also most interested in regional and national programming in general. That said the majority of people as a whole (84%) thought that television was an important source of information about their region/nation, and still a majority of younger people (76%) thought it important.

Older people are also most likely to agree that the main TV channels should show programmes that give out news and information about their local area. Despite a marked generational split on these issues, a high number of young people – 68% – still also feel that the main TV channels should broadcast local interest content.



Figure 4.5: Attitude statements by nation and region

| Percentage agreeing with statement (%)   | All (2,260) | England (1,046) | Scotland (411) | Wales (397) | N. Ireland (406) | Tyne Tees (112) | Granada (150) | Yorkshire (132) | Central (229) | Anglia* (82) | London (204) | Meridian* (86) | W. Country (89) |
|--|-------------|-----------------|----------------|-------------|------------------|-----------------|---------------|-----------------|---------------|--------------|--------------|----------------|-----------------|
| Television is an important source of news about my region/nation   | 84          | 82              | 90             | 91          | 95               | 92              | 87            | 88              | 82            | 86           | 71           | 83             | 86              |
| It is important to show programmes that take place in different parts of the UK/nation   | 77          | 75              | 89             | 87          | 85               | 86              | 75            | 81              | 70            | 81           | 65           | 83             | 87              |
| It is important for ITV1 as well as BBC to show news programmes about my region/nation   | 83          | 82              | 94             | 91          | 93               | 90              | 83            | 87              | 84            | 91           | 65           | 83             | 91              |
| News about my region/nation is of general high standard  | 67          | 66              | 67             | 79          | 81               | 78              | 79            | 85              | 64            | 66           | 44           | 68             | 75              |
| Broadcasters shouldn't be made to show set amounts of programmes about my region/nation  | 34          | 34              | 37             | 36          | 32               | 31              | 33            | 25              | 37            | 36           | 27           | 40             | 52              |
| Other than the news and current affairs, programmes about my region/nation are of no interest to me  | 22          | 23              | 9              | 13          | 17               | 15              | 26            | 18              | 21            | 19           | 35           | 17             | 17              |
| The main TV channels shouldn't be made to show news programmes about my region/nation, there's plenty of news on the internet about my region/nation | 13          | 14              | 11             | 14          | 9                | 11              | 28            | 5               | 15            | 10           | 19           | 5              | 5               |
| I would like the main TV channels to show programmes that give me news and information about my local area   | 78          | 79              | 77             | 80          | 81               | 90              | 83            | 88              | 76            | 77           | 70           | 82             | 81              |
| Websites about my local area are a better way of finding out information for me than the main TV channels  | 27          | 26              | 33             | 30          | 28               | 16              | 29            | 16              | 30            | 30           | 32           | 19             | 21              |

Source PSB Quant Q39-Q41: 2,260 interviews with UK adults aged 16+, October - December 2007

In the quantitative survey, opinion overall is mixed towards setting quotas for regional or national programming, of any type. Equal numbers support and oppose the idea, with 34% agreeing that no quotas should be set and 32% disagreeing. Thirty-five percent feel neutral or have no opinion on the issue. There is little variation between subgroups on this matter.

People do not feel that the internet can replace regional or national television news. When asked if they agreed main channels shouldn't be made to show news programmes due to the large amount of regional news on the internet, two in five people (61%) disagreed (even rising to 66% of broadband users). Feeling on this issue was strongest amongst those in the devolved nations, where people from Northern Ireland, Wales and Scotland were more likely than the UK as a whole to think the internet could not replace regional/national news on television.

The public were also roughly equally divided on the issue of the internet as a source of information about local areas. Just over one quarter agreed that the internet was a better source of information about the local area than the main TV channel, while a similar proportion disagreed. Almost half of those answers were either neutral or had no opinion, perhaps reflecting the portions of the population who have little knowledge or experience of the internet (as we can see by looking at the views of those with broadband access, who do

feel the internet is better for information about their local area by 40% to 28%).

Participants in the deliberative research felt that national/regional news plays a crucial role in PSB programming. These genres of programming were seen as having more importance in the devolved nations. Many participants outside of London felt that the UK network news does not portray the issues that affect them and their community, region or nation, concentrating instead on either world events or those specific to London. Given that many felt a strong attachment to the area in which they lived, understanding the latest developments within it was important. It was believed that this gave them a sense of identity and forged strong links between them and the areas where they lived.

*I just find that anything that happens in England dominates the BBC*  
Swansea

This was particularly true for those in the devolved nations. They were of the opinion that there were specific issues facing their nation and devolved administrations. Without the Scottish, Welsh or Northern Irish news, they felt they would be less informed about these developments and, consequently, less in touch with the nation where they lived. This was especially important since the establishment of the devolved parliaments; participants liked to keep up to date with news from Holyrood, the Welsh Assembly and Stormont and felt that these programmes provided an ideal vehicle to enable them to do this easily.

This theme emerged in the English regions as well. Participants, and particularly those in Birmingham, believed that their region is overlooked yet contributes a great deal to the UK as a whole (particularly in terms of economic development and in helping to foster diverse and cohesive communities), though this was more of a general observation than a desire to alter the news format.

The regional/national news also assumed a level of importance as, with the exception of a few participants in London, many participants felt that this was their *only* source of regional/national. Many stated that the local printed press is not as informative as they would like it to be; participants mentioned how the local newspapers comprise mainly of advertisements. Also, the infrequency of their publication (often, only once a week) meant that this method was not relied on as a means of accessing up-to-date information. However, participants in Scotland were an exception in that they valued the information from their local press.

## **Other national/regional programmes**

In both the quantitative and qualitative surveys, levels of support for current affairs about their nation or region and other programmes about their region or nation, although of lower importance than regional/national news, remained important among the majority of people.

Most participants in the deliberative workshops saw a real value in programming that was made for their region/nation about their region/nation. It was thought that this would help them to better identify with their area and feel a sense of community with it. That said, only a minority of participants claimed to watch such content in general, although there were a number of key exceptions to this especially in the nations. Even among those that watched these programmes though, few found them to uphold the purposes and characteristics that they believed were found in other programme types. Many participants did not feel that such programmes were of a high quality, mainly due to perceived poor script writing and production in comparison to network productions. Nor were they seen in general to realistically reflect life in their area.

Many participants, when thinking about other national/regional programmes, tended to think of programmes which were set in a particular area of the country but shown nationally. *Shameless* was cited as an example of this and was believed to be a more accurate and entertaining portrayal of life in the North of England than anything that was produced and shown regionally.

## **Indigenous language programming**

The quantitative survey asked people in each devolved nation how important the provision of indigenous language programming is. A high proportion of people in Wales (69%) thought that programming in Welsh is important. High levels of support for Welsh language programming is, perhaps, not surprising given the greater numbers of Welsh language speakers than other indigenous speakers in the other devolved nations. In Northern Ireland, just under one third of people thought that some programmes needed to be in Irish and 20% thought Ulster Scots was important. 53% of people in Scotland thought programming in Gaelic is important<sup>6</sup>.

Unsurprisingly, among speakers of each language the importance of showing indigenous language programming rose.

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<sup>6</sup> Survey data has been weighted according to region, work status and age to reflect the population profile nationally within the four nations – because of disproportionate stratifying to boost the number of interviews in the devolved nations, this reduces the effective base size to 1,310.

## Current affairs

Respondents in the quantitative research thought that current affairs programmes are important for society, placing it second only to news in terms of a social priority (See Figure 4.2). However, it was seen to be less important personally, where it ranks eighth. There is variation amongst age groups and, in line with earlier findings about what programmes people tend to watch, current affairs programmes appeal more to those over 55s and less so to younger people (35% of 55-64s say these are a priority compared with 20% of 16-24 year olds). Eighty five percent of respondents thought it important that the main channels provide current affairs (See Figure 4.3).

The qualitative research offers a suggestion why current affairs may be seen to have a social value. As with the news, current affairs programmes were seen to provide insight into issues which, otherwise, participants felt they would know very little about. Participants stated that programmes such as

*It's important to have these programmes – we can be so closeted that they show a side of life we didn't know existed*

Swansea

*Panorama* and *Dispatches* often dealt with hard hitting issues about the nature of life in the UK today (such as living on benefits, poverty and crime). Alongside this, current affairs programmes were believed to be educational. Participants

mentioned how current affairs programmes are often concerned with consumer issues which can, in turn, ensure that people know how to protect themselves against fraud or rogue traders and as such they can provide a useful service.

When examining the role of **current affairs** programmes, the majority of participants across all social groups in the deliberative research claimed they watched these regularly. While the news (both UK network and National/regional News) were felt to provide people with a factual understanding of the topical issues of the day, current affairs programmes were believed to extend people's thinking further still by

*When I watched Alan Johnston on Panorama I found myself putting myself in the position of the family. I found it very emotionally stimulating*

Edinburgh

providing them with views and arguments. Many appreciated this; it was thought to add an element of human interest to the news stories which could work to engage people. Additionally, many felt that current affairs programmes could

*Definitely documentaries help me with my ideas about society and politics. I saw a programme about America's war on terror and it said it was a set up and it changed my idea about the war on Iraq*

Swansea

take more risks in how information is presented. There was a broad understanding that information on the

news has to be presented in an objective and impartial way. However, with current affairs programmes, participants believed that the information shown was often more subjective. While they did not always agree with the

viewpoints portrayed, it was felt that this had the effect of challenging common ways of thinking and opening their minds to alternative views. Indeed, some felt that this was done so successfully that their opinions had altered as a result.

Current affairs programmes are also seen as an important public service function of the main channels with only just over one in five (22%) agreeing that there is enough choice on the digital channels to replace current affairs on the main channels. There is little variation by sub-group on this subject, even among those with access to multi-channel TV (23%).

Equally, the internet is, on balance, not yet seen as an adequate replacement for the main TV channels for information about current affairs. One third of the public disagree that the internet is a better platform for current affairs, compared with 21% who agree. Feeling on this subject, however, is muted, with 47% of the public saying they feel neutral or have no opinion on the matter. There are some variations by different groups. Reflecting the acclimatisation of younger generations to new technology, 16-24s are far more likely than the general public to agree that the internet is a superior platform for current affairs (33% compared to 21% overall). However, even among those with broadband access, more (40%) think the main TV channels are a better source of information about current affairs than the internet (28%).

### **Serious factual**

Serious factual programming was understood by participants to mean nature, arts, science and history programmes. (It should be noted at this stage, however, that there was much confusion among participants about the differentiation between serious factual and current affairs programmes and, often, the two terms were used interchangeably.) There was a strong sense from participants in the deliberative research that serious factual programmes are a key feature of PSB provision. This is supported by the quantitative research. Serious factual programmes came third behind news and current affairs in terms of importance to society and sixth in importance personally. Again, serious factual programmes are more favoured by the over 45s. 82% of people thought that serious factual programming needs to be shown on the main TV channels as a whole.

In the deliberative research participants cited programmes such as *Coast* and

*Nature programmes bring to life what's going on out there. A lot of people just walk around with their eyes closed*

Durham

*Planet Earth* as good examples of serious factual programmes. Participants valued these programmes for the knowledge that they imparted. Many stated that it was as a result of programmes like these that they became concerned for the state of

the environment and, therefore, changed their behaviour to minimise any negative impact that they might have on it. As with current affairs programmes, these were felt to challenge conventional thought and help

people to think critically about any given issue. The quantitative research showed that serious factual programming was one of the most important programme types – particularly from a social perspective.

*Documentaries can expose things – I watched a documentary on Barry George the day before the trial. It showed how the guy was just used as a scapegoat – it exposed the justice system*

Belfast

## Children's programmes

The quantitative research found that over three-quarters of the public (77%) thought it was important that children's programming is shown on the main channels. (Interestingly, this varies between channels. People were more likely to expect ITV1 to show children's programmes, for example, than Channel 4 or Five, perhaps reflecting the historical situation of ITV1 as a main provider of children's programming weekday afternoons).

In the quantitative research 23% felt that children's programmes were in the top five priorities for them and their family, with a similar amount feeling they were important for the good of society, meaning it ranked in the middle.

*My daughter has learnt to count more and colours from Balamory*  
Edinburgh

Among parents 53% thought children's programming was a personal priority, and it ranked second whereas 36% thought it was a social priority. Although there are

differences in results between parents and non parents, when asked about the importance of children's programming specifically, it is clear that people, both parents and non parents think programming for children and teenagers is an important part of PSB.



The role and importance of **children's programmes** was an area that was discussed at length in all of the workshops conducted. On the one hand, participants felt that these were a valuable element in a child's development

*It needs to teach them more numbers and things like that. Like Telly Tubbies – I don't let my kids watch that*

Reconvened

and many were able to name examples of programmes which they thought provided children with stimulating and educational content. *Blue Peter*, *Art Attack* and *Tracy Beaker* were all mentioned as examples of this. Children's programmes were

not only seen as a useful tool to help further a child's educational development but, additionally, they were also thought to provide welcome respite for parents. Those with young children spoke of how the knowledge that they could let their child watch suitable television programmes unsupervised, leaving them free to get on with other tasks, was a comfort. Attitudes towards children's programming did however vary. While most parents who participated in the deliberative workshops believed that being able to access content that was made in the UK was important, some raised concerns about the quality. These tended to be parents who were often selective in what they allowed their children to watch and, while they had no objections to them viewing programmes which could potentially be educational they did restrict, or at least limit, their children from watching those programmes which they deemed to be for entertainment purposes only.

*Tracy Beaker is good for teaching kids to be moralistic*  
Birmingham

## Programming for teenagers

The results of the quantitative survey also support broadcasting programmes for teenagers on the main TV channels. Just under three quarters of the public (72%) felt that UK programmes for teenagers should be on the main TV channels, a figure that rises to almost four in five (79%) among households with children.

There is evidence from the quantitative survey that teenagers are spending less time watching the main TV channels and more time watching digital channels or more time online. However, teenagers are still spending some of their leisure time watching television and the public think, on balance, that content for teenagers is an important function of the main channels. Only 18% think that the main channels don't need to provide programmes for teenagers because of increased choice on the digital channels.

## UK drama

During the deliberative workshops **UK drama** was thought to play a crucial role in reflecting life in the UK – both past and present. It was felt that by doing this, people have a better sense of the issues facing society and how these have developed over time. Beyond this, UK drama was felt to be a quality form of entertainment.

*UK Drama has got the humour of our country, our ways and attitudes – we identify with it*  
Belfast

Many praised the productions for their script writing, acting and locations. Participants

stated these programmes, such as *Spooks*, murder mysteries and psychological thrillers, were a form of escapism which enabled them to leave behind their ordinary life completely.

UK drama programmes also contributed to the sociable benefit of television. Many spoke of how those within their peer group often watched these programmes. Therefore, by watching them too, they had a common point of reference. Such programmes were felt to act as a useful talking point which could bind people together and foster community links.

The quantitative survey showed that a majority (76%) thought that UK drama provision on the main channels is important.

## UK comedy

UK comedy programmes were often regarded as being important as well. This was mentioned by a number of participants, though tastes changed according to life stage. Older participants tended to mention comedies from the past which were often shown as repeats, for example, *Fawlty Towers* and *Blackadder*. Conversely, younger participants tended to reference more contemporary comedy programmes including *Little Britain*, *The Office* and *Phoenix Nights*. Indeed, the quantitative findings show that comedy is significantly more important personally among the younger age group (43% feel it is important compared to 27% overall). 72% of people think that it is important that the main TV channels provide UK comedy.

The real benefit of these programmes was that they were believed to uphold one of the key characteristics of PSB programming; that of providing entertainment. Participants stated that watching such programmes enabled them to relax and enjoy themselves and this was welcomed. Alongside this,

*It's good when you watch comedy – it makes you feel happy*  
Belfast

as with UK drama, they also fostered the sense of being a part of something. Participants spoke of how catchphrases from certain UK comedy shows become quickly adopted into everyday speech and, by watching the programmes that this originates from, one is able to feel more connected to society generally. In contrast to imported comedy programmes, participants related to the UK sense of humour expressed in the home-grown shoes.



## Education/programming for schools

In the deliberative workshops, education programmes, meaning formal education such as programmes for schools were also mentioned as being important, even if they were rarely watched by participants themselves. Most typically, participants referenced educational programmes from the past, such as repeats of *Open University*. Only a few mentioned those that are shown currently such as the *Learning Zone*. This may be partly reflective of the workshop sample which comprised adults of all ages, only a minority of whom were currently studying.

## Arts programmes

In relation to serious factual programmes, **arts programmes** were only watched by a minority of participants, in particular by those that were older and of higher socio-economic groups. However, participants that watched these programmes were passionate about them and believed they formed a

*Great scientists, writers, doctors, philosophers and artists appearing on TV are a great privilege. Even if one doesn't understand the theories exactly, it enriches one's life*

London

key part of PSB provision. The level to which these programmes could be seen as educational was disputed, however. Some stated that, at times, the information

presented is at such a high level that it is hard to digest the message from the programme. Irrespective of this though, those that watched these programmes believed it to be sufficient in itself that such information is presented to the public. They felt that television is the only means by which they would be able to gain access to such subjects and viewpoints and, therefore, it is to be welcomed.

However, the relative lack of importance of arts programmes compared to other programme types is born out by the quantitative research. Only 3% of people consider it as one of their top five priorities for television for them and their family, although slightly more - 10% - think it a top five priority for society as a whole.

Again, the qualitative research offers reasons as to why this may be so. Some felt that, typically, issues relating to the arts have been portrayed as intimidating and a subject for consumption only by those with higher educational qualifications. However, it was believed that by communicating this kind of subject matter via a popular communications channel, such as the television, then this perception may be dispelled.

*I think you can learn a lot about yourself through art and culture. There's an impression that it's an elitist thing, but I think TV can help erode that*

Swansea

Among those participants who were frequent viewers of arts programmes though, there was a sense that the standard of these had declined in recent years. The main attraction of these programmes was felt to be that they have the potential to stretch people and expose them to views that they may not have considered themselves. However, it was thought that the arts programmes shown on the television currently do not live up to this expectation and are more descriptive than challenging.

*I like the arts but the programmes are very poorly presented. The subject is fascinating, but the quality has gone down over the years. Life is not enriched – you don't know anything that you didn't know before*

London

## UK soaps

The importance of **UK soaps** was keenly debated in the deliberative workshops; it was believed that this type of programme can fulfil a number of useful functions in the provision of PSB. In the first instance, many believed these programmes to be entertaining. They were viewed as a form of escapism as, while portraying issues that resonated with participants, they were fully aware that they were fictional. Additionally, UK soaps were seen to bring people together, participants stated that given the high viewing figures for programmes such as these, the plotlines and characters could often be used as a talking point with those in their social group.

The quantitative findings support the idea that soaps have high personal value for many, as they are ranked the third most important genre to people personally (and their families), although they are of middling importance socially.

In the deliberative workshops, there was a strong sense that UK soaps portray life in the UK today and that much can be learnt by watching such programmes. The portrayal of issues which affect society, such as those

*Something like EastEnders shows togetherness which is a lost thing in the world today*

Swansea

related to health, were believed to educate in a subtle way and impart useful information which could then be used in life. It was thought that such programmes effectively portray certain storylines, particularly around health

where they can provide a window for viewers to see what living with such as illness would be like and the effects it can have. They thought that, by understanding this better, they would be able to relate to others more effectively in their peer group or in society more generally who are experiencing similar issues.

A few also saw soaps as aspirational; they were felt to portray a vision of family and community life which no longer exists to the same extent as that which is shown. Examples of this included lengthy marriages, children staying at home and families living close by and remaining in constant touch with one

another. Consequently, in this sense, the soaps were thought to show an ideal of life worth striving for.

Many participants felt that different soaps portray the topical issues that are relevant to different groups in society and so, in a sense, offer tailored information depending on their target audience. To illustrate,

*Hollyoaks did a thing about a girl with anorexia and I know this girl who I went to school with who had that. It made me understand it because she had been denying it for years and how they did it was just how it was in real life*

Swansea

*Hollyoaks* was thought to centre on issues which affect young people while other soaps such as *Coronation Street* and *Emmerdale* were believed to deal

*Hollyoaks is good for dealing with teenage issues; abuse, rape and drugs. Then there's surrogacy on Emmerdale and Coronation Street dealt with Alzheimer's and cancer*

Birmingham

in more family-orientated matters. Many also referenced how, at the end of soaps which deal with issues such as these, that helpline details are often included which can act as a useful port of call for further information if needed.

## UK sports

**UK sports** programmes were also referenced, particularly by male participants, as being a key part of PSB. While many participants watched these for purely personal enjoyment, there was a

*Sport can be quite important – you get a sense of national pride from Welsh rugby*

Swansea

strong sense that such sporting programmes help foster a sense of either regional or national identity. This was due to the fact that they unite a large number of people behind a common purpose or goal. Because of this, some thought that *all* UK sporting events should be classed as PSB. For some of those in the English regions and devolved nations, they argued that

*Sport is a public service. It should be PSB – major cup finals, tennis, golf and football are all social events*

Reconvened

supporting a local football or cricket team does as much to bring communities together as a national event would. Indeed, for many the local football round-up on television was a key element of their national/regional programme consumption.

Like soaps, sports are viewed as more important personally than for society. In the quantitative research forty percent claim sport to be in their top 5 programme types for them and their family, again reflecting a desire to be entertained by television. Many people see television as medium to relax and as a release, and sport can achieve this.

Like soaps, sports are viewed as more important personally than for society. In the quantitative research forty percent claim sport to be in their top 5 programme types for them and their family, again reflecting a desire to be entertained by television. Many people see television as medium to relax and as a release, and sport can achieve this.

## Religious programming

The final genre discussed as a key part of public service broadcasting was **religious programming**. In the quantitative research this was deemed the least valuable for families to watch and was similarly low in terms of importance to society. Not surprisingly, then, it emerged during the deliberative research that only a minority of participants watched religious programming. Among those that expressed their faith strongly, however, it was felt that religious programming was a key element in the television schedules. Not only did they believe it right that their faith is represented on television, as a means of educating and informing others about their beliefs but, beyond this, there was evidence to suggest that these participants gained personally from watching these programmes. They spoke, for example, of feeling inspired and uplifted as a result of their viewing.

Across the groups, even those that were not religious at all felt that religious programming could benefit society more generally. At its most basic level, religious programming was felt to provide a moral education. It was thought to help demonstrate the difference between right and wrong as well as showing the benefits of behaving altruistically and helping others.

*Some people don't like things about religion but it is important to society because we need morals for society to grow*

Swansea

Interestingly, although they are less likely to personally watch them the quantitative research found that young people are also more likely to suggest that religious programmes should be a priority programme type for the main channels to provide, with one fifth (20%) suggesting this compared with 13% of all viewers. Religious programmes are also significantly more likely to be considered a priority by ethnic minorities.

*Religious programming is very important so young children know about other cultures. So when they're older they won't hate each other*

Swansea

Furthermore, there was strong sense that religious programming will become more important in the future. Participants were of the perception that society is changing and becoming more diverse; as a result of migration, for example, participants referenced the increasing number of communities of different faiths that now co-exist in the UK. While many benefits were seen to come from this, participants also recognised the challenges this posed and mentioned the increased potential for conflict and misunderstanding. As a result it was believed that, as society continues to change, religious programming may help to break down popular misconceptions of different faiths (and, in particular, Islam) and help foster better community relations.

Many participants also thought **light entertainment** programming could be categorised as PSB. Some participants felt that the social value that this genre brings – as in binding people together, especially families, providing a form of escapism and relaxation – meant that these programmes provide a useful service to society. Beyond this, many thought that they were educational, though perhaps not in a conventional sense.

*Films for example aren't thought of as being PSB but some of them very much are. Like films by Ken Loach could be very much part of PSB*

Swansea

Participants felt that gleaned practical knowledge from such programmes that, perhaps, they did not uncover from more traditional educational programming. There was also much discussion around the subject of **UK films**. Many participants recognised the burgeoning and developing UK film industry (largely thought to be a result of funding and backing from Channel 4 and the BBC). They believed that UK Films represent and reflect life in the UK, both today and in the past, and also serve to educate viewers on topical issues.

Throughout all of the discussions related to the different programme types, the focus was kept on programmes of UK origin. The importance of this, or otherwise, is discussed in detail in section 4.3.

### 4.3 The importance of UK content

The research examined the importance of UK content in the production of PSB. The initial overriding concerns for participants in the deliberative study were that the programmes in question were of

*It is about quality, rather than nationality*

London

a good quality, informative and entertaining; the country of origin was not something that immediately came to mind. However, on discussing the contribution of UK content, many participants thought it had a high level of importance.

The deliberative research examined further why people felt that UK content was important. Some focussed on the negative. There was a perception that programming from overseas is overtly commercial for example. Participants cited holidays they had taken in the US and mentioned how the programmes shown there featured much greater levels of advertising than those in the UK. It was believed that if more programmes were imported to the UK in the future, then this is also a trend that would come with it. While participants understood that commercial breaks help to raise revenue, many felt that they also serve to disrupt the flow of a programme and can obstruct their enjoyment of it.

Some focussed on the positive, presenting an economic argument regarding the importance of UK content. There was a perception that if programmes are made in the UK, then the revenues generated by them will help the broadcasters to grow and produce content of increasing quality and diversity in the future. Participants were concerned that if broadcasters concentrated on importing programmes from overseas then a significant revenue stream would be lost which, in turn, would negatively affect their outputs going forward.

*It's about the economy too. If you make it here, then money goes back into our economy. Why pay for 'Neighbours' when you can do home-grown content?*

Belfast

In spite of this though, the overall perception was that many were keen that programmes from a variety of countries are shown. It was believed that by doing this, it would be possible to foster a better understanding of cultures, issues and lifestyles from around the world. In turn, participants felt that this would lead to better relations.

In the main though, UK content was thought to better reflect life in the UK today, and the issues that affect and shape it, than those programmes from overseas. There was a great deal of concern among participants that, were UK programming less prevalent in the future, then the identity of the UK may

*If you listen to how children speak, it's like a little America over here sometimes. You lose your identity*

Birmingham

be lost. To illustrate, many spoke in relation to this of the importance of language. There was a sense that due to the perceived increasing prevalence of US programming on

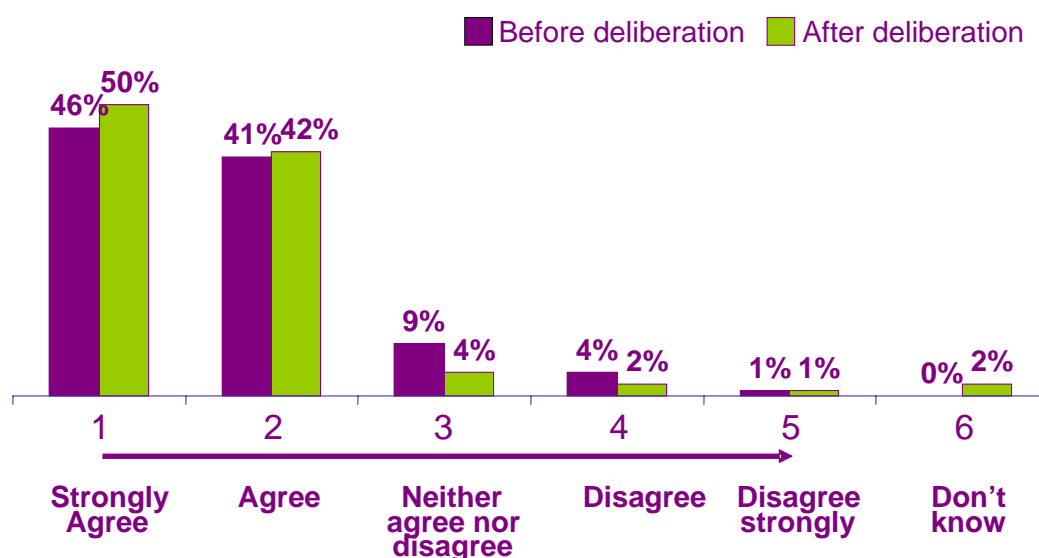
television that young people in particular are picking up American phrases and speech. This was felt to erode the UK's identity and it was believed to be important to guard against this.

This sentiment was expressed when participants were asked to vote on the question of UK content both at the start of the workshop and at the end of the day. As shown in Figure 4.6, at both the start and end of the workshops, the majority of people thought UK content was important.



Figure 4.6 – The importance of programmes that reflect life in the UK

*“It is important for the main channels to show programmes that reflect life in the UK”*



Aggregated data from 6 workshops

This finding is largely supported by the quantitative research. The majority of respondents (83%) thought it important that the main channels provide programmes that take place and reflect life in the UK. Respondents were also asked which of two statements were closest to their own views: on the main channels did people want to see "The best TV programmes from the USA, Europe, Australia and other countries" or "A high proportion of programmes made in the UK". The majority (58%) wanted to see a high proportion of programmes made in the UK.

However, a significant minority (22%) placed the emphasis on receiving the best TV programmes from abroad. Many in the deliberative workshops were of the opinion that programmes from overseas are of a very high quality.

*American dramas are better than the UK ones – they just seem to do things better*  
Belfast

Frequently mentioned in this regard were dramas like *CSI*, *Six Feet Under*, *The Sopranos* and *Lost* along with comedies such as *Friends*, *Seinfeld*, *Frasier* and *The Simpsons*. Given the perceived quality of these programmes, many participants

believed that it not only enhances the offering of the UK broadcasters but, increasingly, provides a standard for UK programmes to aspire to.

Nevertheless, it is generally agreed that it is important that PSB programmes are made in the UK. However, it is more important for some programme types than others. In particular, it was seen as essential for both the UK network news and national/regional/local news programmes.

*If non-UK news becomes shown too frequently then people will end up not knowing what is happening in their own country*

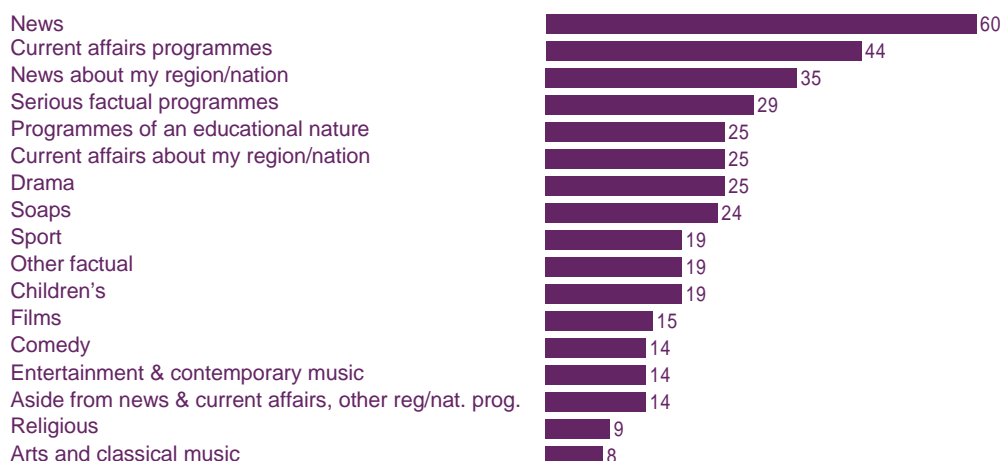
Birmingham

In the deliberative workshops it was perceived that only content made in the UK could accurately reflect the concerns of and issues facing the UK population. Furthermore, participants considered that this content would be more interesting and appealing to them as a result of this. Related to this, it was also believed that UK content would be more credible as it would be more in tune with popular perceptions and beliefs.

The varying importance of UK content for different programme types is shown in the results from the quantitative study in Figure 4.7. When asked to name their top 5 priorities for UK content, people think it is most important that news is made in the UK, this is the view of three in five respondents (60%). News was valued almost equally by most age groups, socio-economic groups and ethnic minority groups, confirming its importance across demographics.

Figure 4.7: Priorities for UK made programmes

Q31. What are the five programme types you consider most important that they take place/are made in the UK?



Source Q31: 2,260 interviews with UK adults aged 16+, October - December 2007



For the similar reasons, it was also believed that UK content is necessary for regional/national news, serious factual programmes and current affairs. In the quantitative survey current affairs came just behind news in terms of importance, with regional/national news in third place and serious factual programmes fourth. Again we see a pattern of the same four or five key genres being picked out as most important in PSB.

There is also value in comparing the programmes people want to see made and based in the UK with their personal and social priorities. There is a positive relationship with both. However, the correlation is much stronger with social priorities than with personal priorities; in other words, the order of importance that programmes are made in the UK is more similar to the order of their social importance than their personal importance. This suggests that, as shown in the deliberative work, the importance of programmes being made and based in the UK is closely linked to people's views of them as providing wider social benefits.

Unlike news, however, there were arguments raised in the deliberative workshops for having a mix of overseas and UK content for serious factual and current affairs programming. It was perceived that allowing for the former would ensure that people in the UK would be exposed to wider issues than those facing the UK alone and to alternative views which could, in turn, challenge their thinking.

*A balance is important – people need to be made aware of other issues*  
London

In the deliberative workshops, UK content was felt to be particularly important for children's programmes. There was a perception that children's programming from overseas can be less educational and, instead, focus simply on entertainment. Therefore, there were worries about the development of children were UK content less of a priority going forward. It was perceived in general that children's programmes from overseas tend to be cartoons, although some parents cited some overseas pre-school programmes as educational and some parents praised the quality and entertainment value of cartoons. This view also applied to educational programmes. While quality and accuracy of information was thought to be of paramount importance in relation to these programmes, some did wonder whether those made in the UK may be more likely to be aligned to the national curriculum and, therefore, more useful.

Perhaps understandably views on the importance of children's programmes varied with age. As one would expect older people are less interested in children's programming being UK-based/made – 12% of older people felt this was important, compared to 19% of the overall population. Unsurprisingly, parents also think that it is important that children's programmes are UK-based/made: 26% of those with children feel it is important compared to 15% without.

Participants in the deliberative workshops believed that there should be a mix of both UK and overseas content in relation to drama and comedy. When thinking about drama, participants stated that they often found it easier to relate to the characters and plots portrayed in UK dramas and, for this reason, they had the potential to be more appealing. However, certain dramas from

*UK drama has got the humour of our country, our ways and attitudes – we identify with it*  
Birmingham

overseas were felt not only to highlight different issues but were believed to be made to a very high standard and, as a result, were enjoyable viewing. The level of importance attached to drama being made

in the UK in the quantitative research is medium with 25% of people naming it in their top five priorities for UK content. This is perhaps explained by the fact that drama is a wide genre. It was felt in the deliberative workshops that it was crucial that historical dramas, for example, were made in the UK. This is a genre where it was believed that only a home-grown production could accurately reflect the heritage and traditions of the UK accurately and credibly. Dramas on other subjects, however, may benefit from being made abroad.

The quantitative research showed that older people, and in particular the over 65s, are more likely than the rest of the population to value UK drama (30% of the over 65s, compared to 25% of people overall).

Although only a small proportion of people named UK comedy in their top five priorities for UK content there was a strong belief amongst certain groups that comedy should be made in the UK. Some participants felt that there is a particular sense of humour in the UK which necessitates that comedies are made in the UK. Participants cited a strong heritage in the UK of producing comedy which is witty, topical and sometimes surreal. *Morecambe and Wise* and *Monty Python* through to *The Office* and *The Mighty Boosh* were referenced in relation to this. Because of this very particular style of humour which was seen as being unique to the UK, it was believed that only UK content would be able to capture this properly. Some participants in the nations took this notion further and felt that it was important to have comedy programmes made in their country which reflected their nation's particular sense of humour. *Chewin the Fat* was mentioned as an example of this in Scotland. However, some felt that comedies from overseas were seen as, potentially, more accessible, of high quality and also more suitable to being watched by the whole family. *Friends*, *The Simpsons* and *Seinfeld* were all given as illustrations of this in the workshops.

There was polarised opinion in the deliberative workshops as to whether soaps should be entirely UK made or whether there is space for those from overseas. On the one hand, participants believed that UK soaps better reflect life in the UK today and, consequently, are easier to relate to and, potentially, more educational in terms of the information they impart through their storylines. However, some considered

*I would rather watch UK soaps than American ones – I can relate less to those*  
Reconvened Workshop

that while the quality of overseas soaps is perhaps not as high, they are more entertaining and can be viewed for escapism and pleasure. This, for some, was felt to be as important as watching a soap which connected with them.

In relation to the arts, the issue of the origin of the content was seen as less important in both the qualitative and quantitative studies: only 8% put it amongst their top five priorities for UK content. Instead, the key differential here, according to the deliberative research, was thought to be the *quality* of the programme. Those that were arts enthusiasts made the point that the subject matter is the same wherever the material is produced and, moreover, it should be left to the viewer to interpret the content. Therefore, where it is made was not considered important. Furthermore, there was the argument made that content produced overseas could expose people to new examples of art they had not been able to see in person (for example, one participant mentioned seeing a Spanish programme about the collection in *Museo Nacional del Prado* in Madrid) and, also, could expose them to new ways of thinking.

Similarly, UK content was also not felt to be a real need for religious programming. It was believed that the issues for each religion are the same, no matter where the content is produced. There was a sense from some of those that were *not* religious that being able to access programmes made overseas may help to increase our understanding of different cultures and beliefs. Perhaps not surprisingly, given their political history, Northern Ireland and Wales are more likely to place value on the UK content and origin of religious programmes than the rest of the UK.

#### 4.4 The importance of mass appeal

The research moved on to examine the importance of mass appeal, in relation to PSB programmes. Should they aim to appeal to as many people as possible, or should they target niche audiences?

The quantitative research asked respondents to choose whether they would prefer a "Wide variety of programme types" or "More of the popular entertainment programmes most people watch". The majority of people (59%) said that they would prefer a wide variety of programme types, but a significant minority (28%) wanted more of the popular programmes, suggesting that there is no universal consensus over the matter and that most people want a wider variety of programmes than just popular entertainment. There was more consensus, however, with regard to the main channels reflecting the importance that the audience places on them to provide PSB. Almost two-thirds of people (64%) favoured a range of programmes on the main channels, compared to one in five (20%) who opted for programmes for mass audiences.

The arguments in the deliberative study also swayed for and against mass appeal. Some believed that broadcasters have a duty to cater for different audiences. These participants tended to be younger and exhibited a more rounded sense of the different groups that could benefit from programming that is tailored to their needs. Along with ethnic minority groups, they also mentioned those with disabilities and long term health conditions, people from different religious backgrounds, young people and the elderly. On top of this, a few extended their thinking to include those in society with different interests, such as a keen enthusiasm for the arts.

These participants felt that given society is diverse, the broadcasters have a duty to provide programmes that reflect the interests of those that make up

*As a society, we have an obligation to ensure that there is the provision for all – including minorities*

Edinburgh, C2DE

the different groups within it. They felt that this would provide real social benefit; not only would the needs of the different groups within society be met but, also, there

would be increased opportunities for others to learn about, and from, other cultures, interests and ways of life. It was believed that this, in turn, would facilitate greater levels of understanding about people living in the UK today.

There were also concerns about the future quality and variety of programmes should the broadcasters to concentrate on meeting the needs of the majority. There was a perception that ‘catering for the majority’ would, in reality, mean producing a greater number of light entertainment programmes that are typically felt to have the highest viewing figures. While many of the participants that considered this to be a risk watched such shows they believed in a need for balance. They stated that only through the provision of a variety of programmes are people able to learn and have their thinking challenged and developed. Thus, in the interests of benefiting society, they saw the need for programmes which cater for different audiences – as well as those for the majority – going forward.

*If it keeps going down to the common denominator, then it just ends up with the same thing on every channel*

London

The argument for catering for different audiences also had its roots in how television, and the BBC in particular, is funded. Participants stated that the licence fee is paid by everyone in the UK who has a television and that, naturally, some payees of this will be from different ethnic, cultural or social groups or those with niche interests and hobbies. They perceived that given these individuals have made this financial investment, then the broadcasters have an obligation to ensure their needs are met and their interests reflected.

*We pay the licence fee – there’s a duty to make the programmes accessible to everyone that pays it*

Swansea

However, as in the quantitative survey, a significant proportion of participants in the deliberative research contradicted the desire for a range of programme types. Some participants believed that, regarding the main five channels at least, broadcasters should cater for the majority. Those who expressed this

*I don't see why the most popular programmes should suffer at the expense of programmes that are catering for a few thousand people*

Reconvened

view were primarily concerned with their own viewing enjoyment; there was a perception that, were the needs of different audiences catered for, there would be less content

available that they themselves would want to watch. They believed that if the broadcasters went down this route, then more of the popular television programmes (and particularly those classed as light entertainment) would be dropped in favour of those that are tailored for different communities within UK society or specific interests. Given that throughout these workshops the role of television as a means of entertainment and enjoyment was stressed by participants, this was something of a concern for many.

In light of this, a few participants did not believe that this course of action made economic sense. Some were of the opinion that broadcasters need high viewing figures to ensure that revenues are raised which, in turn, can be re-invested in producing high quality programmes in the future. There were worries that, should programme makers seek to meet the needs of different audiences, the results could include lower viewing figures and the quality and variety of their programming would suffer in the future.

A few also pointed out that programmes that cater for different audiences may work against creating a cohesive society. They felt that for communities to integrate effectively, those from different backgrounds need to learn about the lifestyles, cultures, traditions, interests and heritage of those that form the bulk of society. It was believed that this could be realised effectively by showing programmes that cater for the majority and, as a result of this, those from different backgrounds would learn about common ways of life and practices in the UK today. Furthermore, some thought that society is not so diverse that it would be impossible to cater for the needs of minority groups as there are so many of them.

*There is such a wide range of minorities though – it is going to be hard to please them all*

Birmingham

Participants felt that there would *always* be people who would be left feeling as though their views and interests are not represented and, in light of this, the broadcasters' efforts might be best concentrated on trying to please as many people as possible.

This perception was set against a sense that the needs of the majority being overlooked *more generally* in society. This view was typically expressed by

*I think we're falling over backwards to cater for the minorities*

Durham

older participants and those from more traditional (often rurally based) communities where social changes such as migration were less apparent.

They felt that society in the UK today was too concerned with being 'politically correct' and in trying to please specific interest groups within the UK.

This worry was reflected in the quantitative study. When participants were asked to choose between "TV programmes that reflect the needs and concerns of different communities within the UK" and "TV programmes that reflect the needs and concerns of the UK as a whole", the majority of people (64%) preferred content that reflects the UK as a whole. 20% wanted programmes that reflected the needs and concerns of different communities and 15% had no preference.

It should be noted that participants found it hard to reach a conclusion on this debate and, also, that many held these two conflicting views at the same time. When thinking about these issues from a personal point of view, many believed that they would be far more likely to enjoy watching television were it to cater for the majority in the style and types of programmes that it produced. In spite of this though, they felt that in the interests of television working to the benefit of society as a whole, then programmes which cater for different groups and interests would be best placed to do this.



## 5. The importance of plurality

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This chapter examines people's attitudes towards plurality of programming in general before looking at plurality of provision for each of the main programme types.

In both the qualitative and quantitative studies, **for many, plurality was of real importance**. Without it, there was a perception that, not only would people be less informed on any given issue but, due to a lack of competition, standards would fall. Participants also thought there was a need to provide a range of perspectives and to ensure that different tastes are catered for.

Thinking about the provision of PSB today, many believed it was appropriate for more than one of the main five channels to show the same type of programmes. This is particularly true of the genre the public most strongly associate with PSB: **news**.

The other PSB genres deemed extremely important for plural provision **are current affairs, regional/national news and UK made programmes**. There is broad consensus on these amongst all groups, although young people are slightly less likely to place importance on them compared to the rest of the population. The only programme type where this was considered to be less of an issue was religious programming, only two in five (41%) of the public said that it was important for religious programming made in the UK to be shown on more than one channel. Even those of strong religious convictions often did not see the need for this; they believed they could access a range of opinions on their faith from those within their religious community

### 5.1 Attitudes towards plurality

Both the qualitative and quantitative studies looked into the importance of plurality – the importance of key types of programmes being shown on *more than one* of the main TV channels. Support for PSB genres to be shown on both the main channels and on more than one of the main channels is closely linked, with the same core programme types coming up as most important as seen throughout this study. Again, this suggests that the importance placed on these genres being shown on (plurality of) the main channels is driven by the contribution these programme types are seen to make to society. The PSB genres that the public feel it is both important to show on the main TV channels *and* on more than one of the main TV channels, according to the quantitative research, are news (both network and regional/national), current affairs (both network and regional/national), programmes that are made in the UK and reflect life here and serious factual programmes. A majority of parents (77%) thought children's programming was also important.



Figure 5.1: The importance of plurality

Q34 How important is it that . . . is shown on more than 1 of the main TV channels?



Source Q29: 2,260 interviews with UK adults aged 16+, October – December 2007

There were some differences by subgroup. Overall, young people generally show lower support for plurality across the main TV channels for all types of programme, perhaps reflecting the different media consumption habits and priorities of this age group that were picked up in the deliberative workshops. They were significantly less interested in news, current affairs and regional/national news being shown on more than one of the main channels, although levels of support are still relatively high – eight in ten (80%) of 16-24 year olds say it is important that news is shown on more than one of the main channels, compared with 86% of the general public overall.

Reasons behind the importance of plurality were discussed in detail in the deliberative workshops. Participants felt it crucial that they had a choice in which broadcaster they turned to. As is discussed in Section 6.2, they had different associations with each of the main channels and, therefore, believed they catered for different needs and audiences. Given this, they felt it important that key types of programmes are shown on *more than one* of the main channels. Beyond this, they also believed that ensuring plurality is a means of promoting competition and, therefore, raising standards.

*It's very important. Without that the BBC can say whatever they want. With competition the BBC has to raise its standards, ITV has to raise its standards*  
London

## 5.2 The importance of plurality by programme type

While, overall, plurality was felt to be important there were variations across different programme types. These are discussed in more detail throughout the remainder of this section.

### **UK News**

The quantitative research (See Figure 5.1) shows that news is seen to be the most important PSB genre for plurality; with 86% of the public saying it is important that it is shown on more than one of the main TV channels – of these, almost half of the public (49%) say that it is *very* important.

This does vary by age. As seen throughout this research, older people are more likely to feel it is important that news is shown on more than one of the main TV channels – over nine in ten of 45-54 year olds and the over 65s (although having said that, news is still the top priority for younger people as well). These groups are also more likely to support plurality on the main channels for serious factual programmes, regional/national news and UK made programmes.

Participants in the deliberative workshops considered the news a crucial genre to have available on more than one of the main five channels. Plurality was valued as it was perceived to contribute to accountability, impartiality and quality.

## Regional/national news

As Figure 5.1 shows, plurality was not only seen as important for the UK network news but also for national and regional news programmes (76%). In terms of regional/national provision, news was of relatively higher importance than current affairs or ‘other’<sup>7</sup> regional/national programming. 65% of people thought ‘other’ types of national and regional programmes were important and 73% thought regional/national current affairs was also important. When asked if ITV and the BBC should provide regional/national news programmes 83% agreed. This varied significantly in each of the devolved nations, where over 90% of people agreed with this statement.

Participants in the qualitative workshops felt that plurality of regional/national news was crucial in order for people to have different perspectives on the same subject available to them. Additionally, this plurality was seen to offer increased accountability and was thought to guarantee that different types of audiences would be catered for within the same topic area. This was reflected in the voting sessions, which supported the quantitative survey, in which nine in ten agreed that *it is important for ITV as well as the BBC to show programmes about and for people in my local area.*

However, the strength of opinion on this was not uniform across the UK with people living in the devolved nations and outside of the South East believing plurality for regional/national programming to be more important than those living in London and the surrounding areas. Plurality of regional and national programmes was a significant issue for these groups as these programmes are of particular importance to them.

*I watch one [local news] and then turn over to the other channel and you get a different angle on it*  
Swansea

In the workshop in Edinburgh, the opinion was aired that plurality would lead to more information on national issues being received by the population. It was thought that this, in turn, would help engage people with Scottish politics and, therefore, would help strengthen the democratic process. To ensure this is the case, people in Scotland were very keen that national news is provided on both the BBC and STV. They felt that were this not the case, then they would not be able to access the content

*We would get more information about government – politics and voting – to make us more serious about Scotland*

Edinburgh

*It is important for people in Scotland to get their news as they do not get it elsewhere. We want BBC and STV*

Edinburgh

<sup>7</sup> When raising the issue about ‘other’ regional/national programming, the questionnaire defined it as ‘Aside from news and current affairs, other programmes about my region’, that is programmes made in and about the region.

that is important to them.

In Wales, for participants at the workshop in Swansea plurality of national news was also seen as being essential. Broadly, they did not feel that the issues affecting their country were portrayed effectively on the UK network news. Therefore, showing a number of national news programmes enabled them to stay up to date with events in Wales and meant they could choose the broadcaster which suited them best in terms of style and presentation. This sentiment was also echoed in Birmingham.

Plurality of national news programming was also tied up with cultural identity and language. While many of those present did not speak Welsh themselves due to the location of the workshop (Swansea has a much lower prevalence of Welsh speakers than the North of the country)

*I feel more Welsh than British. This is a priority for Welsh people – they like to keep their own identity rather than be a part of the British people so S4C is important*

Swansea

they were still keen that Welsh language national news programmes are provided to others via S4C. The quantitative findings support this, showing that a majority of the Welsh agree that it is important the channel provides a wide range of programmes in Welsh (68%), reflects life in Wales (76%) and cover events that are of interest to the Welsh people (78%). Support for these statements is again particularly high amongst Welsh speakers.

This question of national identity also emerged in Belfast. While some preferred to watch the national news on the BBC, most spoke in favour of UTV. It was felt to better connect with the people that lived in Northern Ireland and was believed to speak to them more directly about the issues affecting the country. In this sense, the provision of UTV was felt to help build communities and bind people as a result of shared interests. Consequently, it was considered that plurality of national news programming was important here.

*We can relate more to UTV – it is better than the BBC in Northern Ireland*

Belfast

## Other programme types

The importance of plurality by programme type was not only restricted to these genres and participants in the qualitative research were concerned that plurality remain for serious factual and current affairs programmes. This was primarily a result of the notion that viewers are presented with opinions in these programmes as well as facts and, therefore, plurality ensures that a variety

*If only one channel providing factual programmes, you wouldn't get enough diversity or numbers of the shows*

Swansea

of outlooks are conveyed. Their importance is supported by the quantitative findings where current affairs was second only to news for plurality with 77% thinking it important that it was aired on more than one channel (even more so

among socio economic groups ABC1). Serious factual programmes garnered an only slightly lower 73%.

In the deliberative workshops UK drama emerged as a genre that it was thought important to be shown on a number of the main five channels in order to cater for different audience tastes. For example, the BBC was felt to concentrate on period drama whilst Channel 4 was believed to focus on topical issues. Consequently, plurality in this genre not only ensures that there is something for everyone but also that the competition between the broadcasters would help to keep the standards of these programmes high.

These kinds of views were also expressed in relation to UK comedy and children's programming. In the case of UK comedy, plurality was believed to ensure that there are programmes available for both alternative and family audiences.

*We need at least two broadcasters with children's programmes*

Swansea

For children's programming it was a similar story; both different tastes and ages are catered for by a plurality

of programme types. However, unlike the other genres previously discussed it was not necessary for this genre to preserve plurality across the main five channels, many parents in the workshops appreciated the digital channels provided by CBBC, CBeebies and CITV and thought these were convenient and successful services for children's programmes (see Section 6 for more discussion).

Plurality was seen as less of an issue in the area of religious programming in both the qualitative and quantitative studies. In the quantitative research just over two in five of the public (41%) said it was important for religious programming to be shown on more than one channel. The deliberative workshops offered some reasoning for this. Religious programmes were seen as a niche genre with limited appeal to a wider audience. Additionally these programmes were seen as ways to 'pass the time' rather than an appropriate way to become informed on and participate in the religion concerned in the programme. Even those individuals who had strong religious views did not necessarily see a need for plurality in the genre. Often, they believed that access to important issues within religion could most effectively be engaged with by involving ones self with the religious community.

It is important to state that this was not a view held by all participants. Indeed, a minority felt that plurality is an important issue for religious programming across the main five channels. This opinion was often raised in the context of presenting differing points of view regarding Islam. Again, ethnic minority viewers are particularly likely to place importance on plurality in programmes that include different ethnic minority groups, and for religious programmes made in the UK.

## 6. The current delivery of Public Service Broadcasting

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This chapter examines people's attitudes towards the current provision of PSB on the main channels. It questions whether there is enough PSB on the main channels. It explores people's attitudes towards the different channels and examines whether plurality is important. It also looks at people's attitudes towards the main broadcasters' portfolio channels and websites.

Overall, for all of the PSB genres, **a majority of respondents feel that there is enough of this content shown on the main TV channels.** The programme types that people want to see more of are serious factual programmes that get people interested in learning about different topics, and UK-made comedies and sitcoms. One quarter of parents wanted to see more children's programming made in the UK.

The main channels are perceived to cater for different audiences. The BBC was seen as an established and trusted broadcaster. The public had highest expectations of the BBC. Ninety-three percent of people feel that it has a responsibility to set high standards.

Channel 4 was believed to be more appropriate for younger viewers due to its more risk taking approach. Three in five (62%) think that Channel 4 caters for audiences that other channels do not and that the channel is noticeably more innovative and risk taking in its programmes.

Expectations of ITV's role in PSB are also high: its role in providing regional/national programming in particular was valued. This was not only the case for regional/national news (69% of people thought that ITV1 and the BBC should provide regional/national news.) Seven in ten said that they should show programmes made in a variety of parts of the UK and 69% felt they should show regional interest programmes other than news and current affairs. At the same time, a small majority of respondents thought ITV1 should be free to do what it needs to attract large audiences.

Regarding Five, while there were concerns about quality expressed in the deliberative workshops, some welcomed its accessible presentation style. Five experiences lower expectation levels than the other main channels; in the quantitative research, when asked whether they agreed or disagreed that Five should show key PSB programmes the majority still feel it is important that it broadcasts PSB content but as many as one third are ambivalent.

The role of the main broadcasters providing content via other platforms was appreciated by a small majority. Just over half of respondents (53%) thought that it important that the main broadcasters' provide digital channels. This rose to 68% among 16-24s, with importance declining with age, and 60% among people with cable/satellite. People with Freeview tended to be more in



line with all adults 16+ with 57% thinking it is important. Seven in ten people said that they would like to see either the same number of digital channels in the future or more provided by the main PSB channels.

Some participants in the deliberative research were of the opinion that PSB type content is currently shown on some digital channels. To illustrate, of those participants with access to multichannel TV, many felt that some of the main broadcasters' portfolio channels, such as BBC Four and More 4, provide very high quality content, especially for factual programming. BBC Three was mentioned in relation to UK comedy. Commercial digital channels such as Sky News and Discovery Channel were also mentioned by some. However some digital commercial channels were also criticised for low quality content and high level of repeats.

The ways in which people are prepared to access PSB content is changing. There is a substantial minority of people (44%) who support the main broadcasters' provision of TV content via their websites that allow content to be watched when you want to watch it. This rises to 56% among 16-24s and 59% among people with broadband.

The importance of TV broadcasters providing additional content on the internet was recognised by just over half of the public (53%), but that figure rises to 70% for the 16-24 age group and 70% among people with broadband.

These sentiments were echoed in the deliberative workshops though there was also some caution expressed about the other platforms, in particular, about ease of access and trustworthiness of content in comparison to content provided by the main channels.

## 6.1 The levels of delivery of PSB

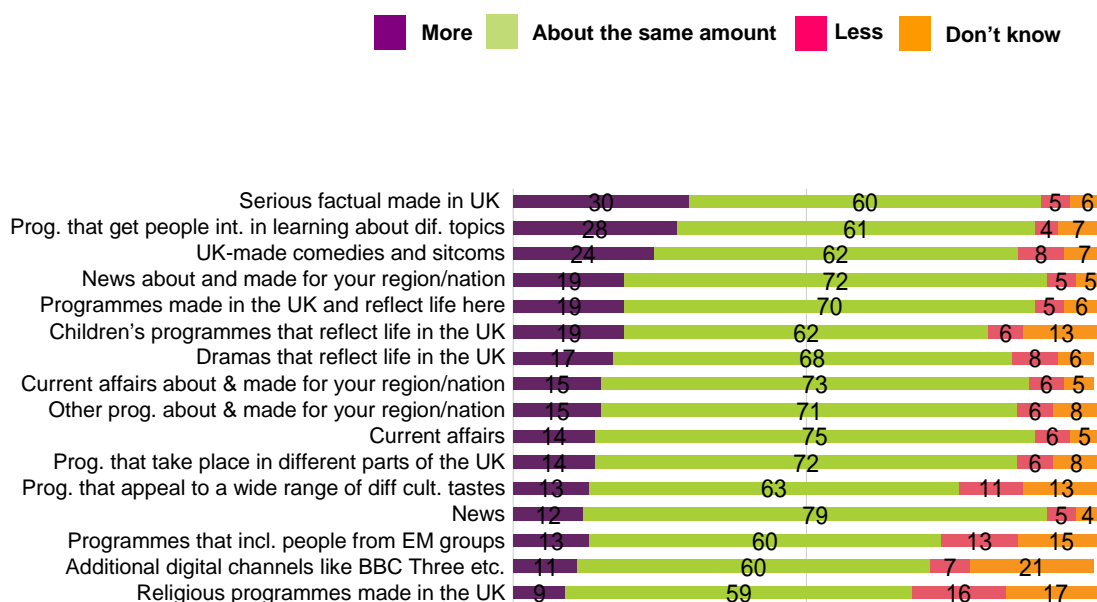
### **Current satisfaction with the amount of PSB by programme type**

The quantitative research explored public satisfaction with the current provision of PSB by programme type. Overall, for all of the PSB genres, a majority of the public feel that there is enough of this content shown on the main TV channels. In each case over half of the public say that there should be the same amount of content on the main channels. This rises to almost eight in ten of the public for news programming (79%) and three quarters for current affairs (75%).



Figure 6.1: Satisfaction with current levels of PSB

Q35. Should there be more/less or the same amount of this content on the main TV channels?



Source Q35: 2,260 interviews with UK adults aged 16+, October - December 2007

The programme types that people want to see more of are serious factual programmes that get people interested in learning about different topics, and UK-made comedies and sitcoms. Three in ten members of the public say that there should be more serious factual programming on the main channels. Just behind this, twenty-eight percent agreed that there should be more programmes that get people interested in learning different topics. Around one quarter of the public would like to see more UK-made comedies and sitcoms. This perhaps reflects the concerns aired in the workshops that some of the main channels rely too heavily on shows imported from the US. Just under one quarter of parents thought there should be more children's programming. One in five thought there should be more regional/national news and more programmes made in the UK.

Response to the rest of the PSB genres was broadly consistent, with between ten and twenty percent of the public saying they would like to see more content on the main channels for twelve of the other PSB genres.

For only one PSB genre – religious programming made in the UK – were greater numbers of the public in favour of less, rather than more, content on the main TV channels.

## 6.2 The delivery of PSB by the main five PSB channels

The research examined the delivery of PSB by each of the main channels. Irrespective of the proliferation of multichannel television and the internet, participants in the deliberative workshops predominantly saw the main five channels as their 'window on the world'. As demonstrated in the section above, these channels were the main source for News, Current Affairs and Serious Factual

*To be honest what channel do you start with when watching telly? BBC1! And usually the TV sets itself back to Channel 1 anyway*

Edinburgh

content as well as entertainment genres such as UK Drama and Comedy. The vast majority of participants felt that there was simply too much choice on digital and navigation issues meant that the five main channels were easier to access. Participants did not expect this situation to change significantly even after Digital Switch Over in 2012. The familiarity factor and the higher levels of trust that participants had in the main five channels was a significant driving factor in the 'default channel' status which was attached to them by many of the participants in the workshops.

However, even within the main channels the public had very different expectations. While the BBC was seen as traditional, and therefore broadly trusted, ITV was believed to provide news and current affairs programmes that were lighter and easier to digest. On the other hand, Channel 4 was seen as providing more off-beat and risky news and current affairs programmes.

The report will now focus on the five main channels individually.

### **BBC**

Both the qualitative and quantitative research found that people have high expectations of the BBC. There was a general perception amongst participants in the deliberative workshops that it is more important that the BBC shows PSB programmes than any of the other main or digital channels. This was due to the fact that the BBC was seen as a flagship broadcaster and considered to be a respected international brand by both consumers here and by those from outside the UK.

These high expectation levels are mirrored in the quantitative findings. Over nine in ten respondents (93%) agree that the BBC should have responsibility to set high standards. Similarly, over four in five people (82%) feel that given the public funding it receives, the BBC should have special responsibilities to show programmes that commercial broadcasters do not.

As shown in Figure 5.5, the majority of the public also feel that we are entitled to expect that the BBC will provide more programmes that suit our tastes and interests than other broadcasters and that it is important for the BBC to show a high proportion of programmes that reflect life in the UK. Over two-thirds of

the public agree that it is important for the BBC to keep up with new technology.

Figure 6.2: Respondents' views on the BBC



Expectations of the BBC were broadly consistent across the nations, although those living in Scotland, Wales and Northern Ireland do appear to have higher expectations on a couple of factors. People living in these nations are more likely to agree that the BBC should provide more programmes that suit their interests than other broadcasters. However, there is some variation in the findings between different age groups. Young people are less likely than the overall population to agree that the BBC should set high standards and show different types of programmes, while over 65s are more likely.

The deliberative research shows that this expectation is matched by a strong respect for the BBC. As per its remit, it was felt generally (though not

*You can rely on the BBC to provide that level of quality*  
London

exclusively) that the BBC was both impartial and accurate. As a consequence, participants stated that, typically, any serious informative programmes produced by the BBC are inherently more trustworthy and reliable than those produce by other broadcasters.

However, some participants also believed that the respect which the BBC has built up has been damaged by recent cases such as the Hutton Inquiry, recent phone-in scandals and the income of some presenters and senior managers. Some participants also felt that the broadcaster may have a degree of left-wing political bias.

*I don't trust the BBC news sometimes. They are a bit on the left, I much prefer Channel 4 news; it seems much more neutral*

London

There was also a discussion about who the BBC's core audience is. While, on the whole, the BBC was believed to make programmes which have mass appeal and that, in particular, it takes care to explain complex issues on the news to ensure its programmes are accessible, there were those that disagreed with this. Some participants, and particularly those that were younger and from lower socio-economic groups saw the BBC as something of a middle class, middle aged institution and, therefore, one which was not designed for them. In contrast, these groups saw Channel 4 as being produced with them in mind. Therefore, in this regard, it was considered to be important that PSB is also provided on Channel 4 to ensure that no one is excluded from accessing this type of content, and we now consider views on Channel 4 in more detail.

## Channel 4

Channel 4 was often seen by participants in the deliberative workshops as offering an alternative voice to the BBC which engages with younger audiences more effectively. Many programmes it broadcasts were perceived as daring and groundbreaking and to have more of an 'edge' when compared to the other main broadcasters.

*Channel 4 tackles concepts that the BBC would leave alone. I think it is more daring and I think you find more interesting stuff on there*

Birmingham

Participants asked to vote at the start and end of the workshops on the question *Channel 4 does a good job of catering for audiences that other channels don't cater for*. At the start almost six in ten agreed and by the end almost two thirds agreed, which illustrates that the sentiment became more ingrained during the course of discussions.

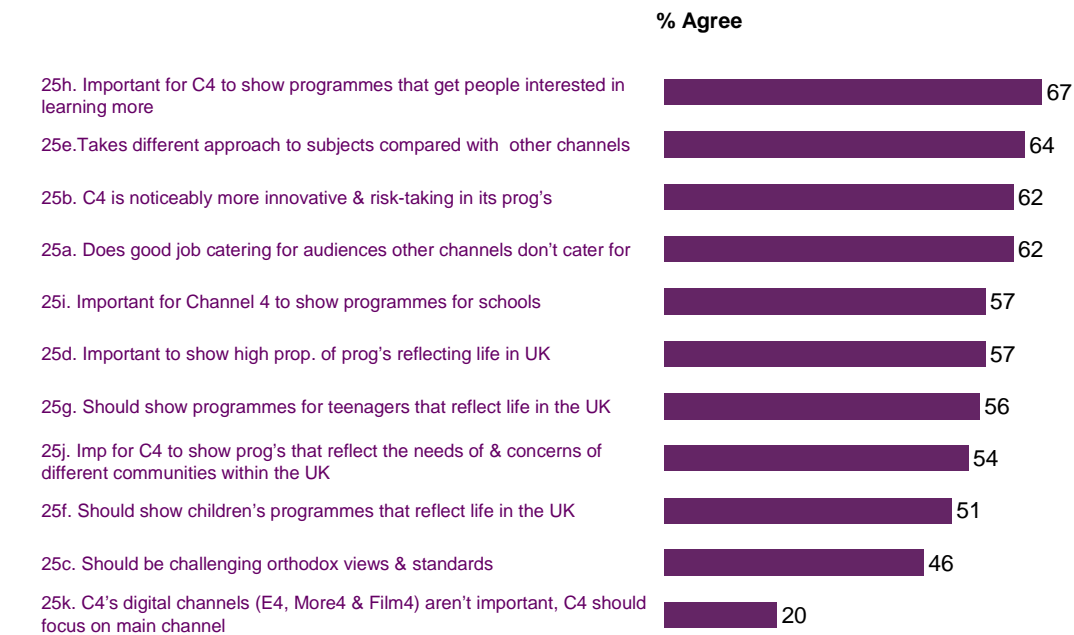
This shift in opinion was largely driven by a discussion about how participants would feel were PSB provided by the BBC only, or, as one possible alternative, by the BBC *and* Channel 4. In the case of the former, many were concerned about the BBC having a 'monopoly' on the provision of PSB.

The findings of the quantitative survey tend to endorse the views on Channel 4 expressed in the workshop. The channel is perceived to fill a niche and offer an alternative point of view to other channels. Three in five people (62%)

agree that C4 caters for audiences that other channels do not and that the broadcaster is noticeably more innovative and risk taking in its programmes (rising to seven in ten among its viewers).

Figure 6.3: Respondents' views on Channel 4

Q25 To what extent do you agree or disagree with each of the following statements about channel 4?



Source 25: 2,260 interviews with UK adults aged 16+, October - December 2007. \*C4 viewers (1,143)

ITV1

Participants during the deliberative workshops saw ITV1 as offering a more popular view with a particular strength and important role in the area of national and regional programmes. It was also believed to offer more light entertainment programmes which could be watched by the family as a whole. Some of its current affairs output was seen to lack integrity by a few participants in that they thought the content was less in-depth and more likely to be sensationalised – they felt they associated the word “trust” with BBC and Channel 4 more than ITV1 and Five.

*Regional news is important to me, and that's what ITV is good at*  
London

*I'd like ITV to catch up with the BBC across all of the genres*  
London

In the quantitative survey, these views were teased out to reveal some contradictions – the public expect a wide range of programming from ITV1, including some PSB content, but there is inconsistency on their views on the freedom (or otherwise) that ITV should have.

There was strong public endorsement of the importance of ITV1 showing PSB programmes. A comfortable majority of the public agreed that it is important for ITV1 to show a range of PSB content. Seven in ten (70%) said that ITV1 should show programmes made in a variety of parts on the UK, and the same proportion thought they should show regional-interest programmes other than news and current affairs. Many also felt that ITV1 should show children's programmes that reflect life in the UK (68%), and a high proportion of programmes that reflect life in the UK in general (57%).

Figure 6.4: Respondents' views on ITV1

**Q24 To what extent do you agree that . . . ?**



Source Q24: 2,260 interviews with UK adults aged 16+, October - December 2007

However, opinion varied by programme type. There were lower levels of support for other programme types, with just under three in five thinking the channel should show more serious documentaries during peak viewing hours.

On the other hand, a small majority of people thought ITV1 should be free to do whatever it feels necessary to attract large audiences. Forty-two percent also felt it would be better for ITV1 to concentrate on popular entertainment, rather than try to do everything. This was also a view commonly expressed in the workshops, that ITV should be free to provide programming that is more light hearted or easy watching. So in all there are high expectations on ITV1 to provide some PSB content, such as regional/national news and children's programming, while at the same time, there is an expectation of popular entertainment programming.

## Five

The public are much more ambivalent about, and have lower expectations towards, Five. During the deliberative workshops, Five's programme quality was often questioned, but although it was perceived as comparatively 'tabloid' in its approach and

*It's about quality as well. A serious factual programme on Five is "I sawed my mother in half"!*

Birmingham

sensationalist, it was also thought to offer clear and simple presentation of news and current affairs and serious factual programming which was often believed to be easier to understand for some. These participants felt more comfortable watching this output and felt more able to easily digest the key issues than when compared to programmes produced by the other main channels. They believed Five's output was aimed at them and did not assume a prior level of knowledge about a given issue which was appreciated.

*Presenters on Five don't put on airs and graces. I can relate to them*

Durham

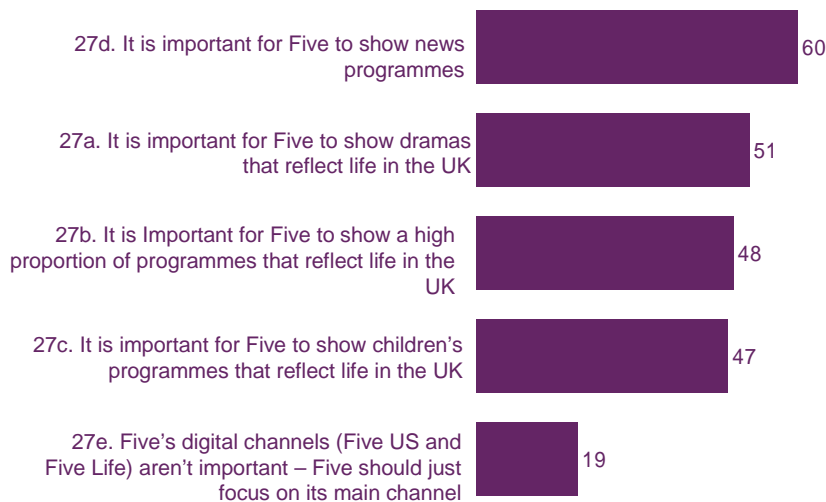
However, many believed that Five relies heavily on US imports to provide much of its programming. *CSI* was mentioned as illustrative of this. While some appreciated this and enjoyed watching this kind of programme, they also felt that the channel should invest more in UK content. Additionally, it was also perceived to show a lot of repeats. While this was felt to allow people the opportunity to see things that they had either missed first time round or had enjoyed and wanted to see again, many thought that Five should make more of an effort to show new programmes in order to ensure that its output matches current interests and concerns.

The findings of the quantitative survey back this up. Expectations of Five were found to be lower than for the other channels, although many people said that it was still important for Five to show PSB content. A majority of the public feel that it is important that Five shows news programmes (60%, rising to 73% among Five viewers), and just over half of the public think it is important that Five show dramas that reflect life in the UK (51%, rising to 63% among Five viewers).



Figure 6.5: Respondents' views on Five

**Q27 To what extent do you agree that . . . ?**



Source Q27: 2,260 interviews with UK adults aged 16+, October - December 2007. \*Five viewers (881)

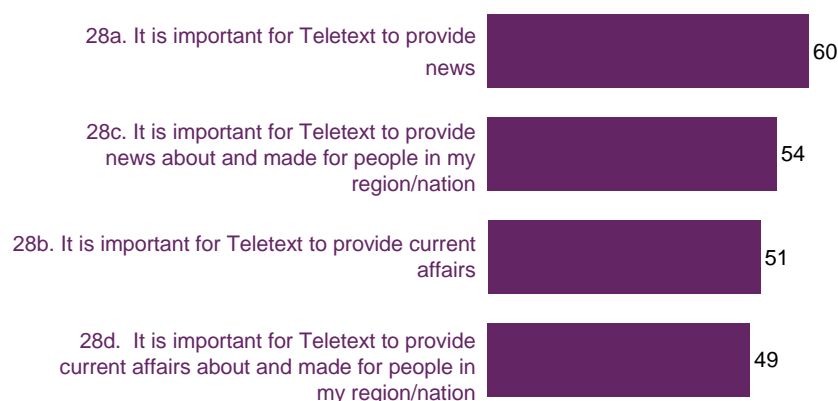
However, more than for any of the other main channels, members of the public are more likely to have no opinion or not care either way on these questions. In general, for all types of PSB programmes, around a third of respondents say that they either have no opinion or neither agree nor disagree that Five's PSB content is important. This ambivalence rating rises as high as 45% for children's programmes, which interestingly does not change significantly amongst parents or those without children. This may reflect the lower expectations for the channel's PSB content expressed in the workshops, although it is equally likely to reflect lack of familiarity with this channel (as viewers are more likely to express an opinion of the channel).

## Teletext

The quantitative study also looked at attitudes towards Teletext on the main channels, and what, if any, expectations the public had of its PSB role. At least half the public feel that Teletext should be providing news and current affairs, both UK wide and at a regional/national level.

Figure 6.6: Respondents' views on Teletext

Q28 To what extent do you agree or disagree with each of the following statements about teletext?



Source Q28: 2,260 interviews with UK adults aged 16+, October - December 2007. \*Teletext users (344)

Three in five respondents (60%) said that they felt it is important for Teletext to provide news, although this rises to 86% among regular users. Slightly fewer (54%) agreed that they should provide news for their region or nation (79% among regular Teletext users). Just over half thought the service should cover current affairs, with a similar number saying this should also be at a regional or national level. Perhaps reflecting lower overall engagement with Teletext than the main channels, across these statements a significant minority say that they either do not know or neither agree nor disagree with the statements; conversely, regular Teletext viewers are much more likely to say it is important that the service provides these PSB programme types, as shown above.

### 6.3 The role of the digital channels

This research examined the role of the digital channels provided by the main channels (e.g. ITV3, E4, BBC Three) and the digital commercial channels (such as Sky News, UK TV History, etc) in spite of the fact that, strictly, only the BBC digital channels are classed as providers of PSB.

The role of the main broadcasters in providing content via other platforms was appreciated by a small majority of people in the quantitative survey. Just over half of respondents (53%) thought it is important that the main broadcasters provide digital channels. This rises to 68% among 16-24s with importance

declining with age. By TV platform, there is no significant difference for people with Freeview (57%) whereas 60% of people with cable/satellite thought it important. Just over half also agreed that (52%) it was important they be provided by *more than one* of the main channels. When asked if they would like to see the same, more or less digital channels from the main broadcasters, seven in ten said that they would like to see either the same number of digital channels provided by the main broadcasters (60%) or more (11%). Only seven percent said that they would like to see less.

The deliberative research looked into what role digital channels have in the provision of PSB.

Before exploring the role of the digital channels it is perhaps useful to discuss participants' general perceptions of these. These views help provide useful context for the rest of this section.

*Main channels have to be more broad and general. The digital ones can be specific. [They can be] aimed at an age group, a type of person*

Durham

Many of those with access to the digital platforms were very positive about the extra benefits and enjoyment that this brought them. Firstly, having access to the digital channels was felt to provide people

with more choice about what they watched and when. For those who held what they perceived to be interests not reflected often on the main five channels, such as the arts, being able to access this kind of content was often welcomed.

Content provided over the digital channels was also felt to be more convenient. Participants stated that they were no longer bound by traditional schedules and, due to the repeats or dedicated channels, could watch what they wanted to when it suited them to do so. A few participants, especially those that were younger, also felt that the digital channels were able to take more of a risk with the kinds of programmes that they showed. This was perceived to be because programmes on the digital channels had lower viewing figures. However, this more innovative approach to broadcasting was appreciated and, often, younger audiences found more which they wished to watch on the digital platforms.

*Sky News is a lot better and there is the difference in quality, quantity and the variety of information. They provide choice for the consumer*

Edinburgh

There were those participants, however, that were sceptical about what the digital channels could offer them. These participants were typically older and had access to the main five channels only. Firstly, they were of the opinion that the quality of programming has reduced over the past few years. They perceived that with the addition of portfolio channels from the main broadcasters then standards would be diluted further still as the budgets are increasingly stretched. Indeed, this point was made by a minority of those with access to the digital channels. More generally though these participants were concerned about their ability to get to grips with the new technology

associated with digital television and did not think they would be able to find anything that they wanted to watch.

## Portfolio channels

The portfolio channels of the main five broadcasters were broadly seen to offer PSB type content to a certain degree and More 4 and BBC Four were regularly praised for providing documentaries of a high standard. The

*Satire comedy...It is a niche thing, it's the sort of thing that can go on digital*

London

portfolio channels of the main broadcasters, such as BBC Three and ITV2, were predominantly seen as providing three main types of content;

namely niche programming for different audiences, experimental and developmental programmes and repeats. Many participants saw the portfolio channels as a place to go if there was nothing 'good' to watch on the main five channels. However, these portfolio channels were broadly seen as embodying the trustworthiness of their parent broadcaster, although there was some trust and quality issues with Five which was considered to rely heavily on US imports.

More generally, participants with access to the main broadcasters' portfolio channels felt that they were able to watch *more* PSB than those who only had access to the main five channels. They were of the opinion that much of what is provided on these channels lives up to the purposes and characteristics of PSB as described earlier in section 4.1. As well, due to their perception of the main broadcasters' portfolio channels being less risk averse in their approach to programming, some mentioned how their views had been challenged by programmes they had seen on the main broadcasters' portfolio channels.

## Digital commercial channels

When examining the commercial digital channels many people valued the social importance of the content on offer, in particular that delivered through UK TV History, Discovery Channel and Sky News. Whilst these channels were often thought to be entertaining they were also thought to strike a good balance by also being educational and informative.

The digital commercial channels, on the other hand, were seen as providing four main types of content; namely light entertainment, popular American shows, specialist programmes which focus on a particular subject (e.g. the Discovery Channel) and repeats with viewers tending to go to them if there is nothing good on the main five channels. However they were occasionally seen as destination channels for shows not available on the free-to-air channels (for example, *Are you smarter than a 10 year old*).

There were a number of negative aspects to the commercial digital channels, however. These channels were often perceived to be less trustworthy and of a lower quality than the main five channels and their portfolio channels. This perception often centred on the relatively recent appearance of these channels meaning that they were less familiar, which led to feelings of scepticism for some. This also tied into some participants' cautious uncertainty regarding the motives of these corporation controlled channels. Often, participants believed that these channels can be used by their parent corporations to impart their own beliefs and value systems in much the same way as national newspapers.

## Concerns

There were a number of perceived differences between content on the main channels and the digital channels which centred on quality, a lack of regulation, old or repeated programmes, a focus on commercial success and, for the subscription channels, cost. Taking these points in turn, concerns about quality were mentioned with regard to content on both the main broadcasters' portfolio channels *and* the digital commercial channels. While many participants recognised that there are programmes of a high quality on these channels, there was a sense that this was sometimes diluted by being sandwiched between programmes which were perceived to be of a lower standard. BBC's portfolio channels were not immune from this with some mentioning BBC Three in this regard.

*Just because they are digital doesn't give them the right to pour out junk*

Swansea

Similarly, the issue of old or repeated programmes was also mentioned in relation to programmes shown on both the main broadcasters' portfolio channels and the digital commercial channels. Participants with access to the commercial digital channels mentioned how the Discovery Channel and the History Channel tended to show repeats frequently while those with Freeview often felt the same about ITV2 and E4.

Some of participants' concerns, however, were mentioned only in relation to the digital commercial channels. Due to their status and the method by which they were funded, it was believed that the digital commercial channels make programmes primarily designed to secure the highest possible rating figures, rather than out of a desire to inform and educate viewers. It was believed that this, in turn, often leads to programmes of a more sensationalist nature and ones which try to use shock tactics to hook the viewers.

Issues around cost were also mentioned with regard to the digital commercial channels. Some of those with access to these channels resented paying the monthly subscription fee as they felt *forced* into doing so due to a lack of programmes which catered for their needs and interests on the main broadcasters' channels. This was mentioned particularly by those with a keen interest in sports and the arts. They felt that paying for content made the programmes more exclusive and, as a result of their potentially limited reach, they could not be classed as PSB in the same sense as those programmes shown on the main five channels of their portfolio channels. Of course, this was by no means the view of *all* those that paid for access to the digital commercial channels. Indeed, there were some that were happy to do this as they believed the cost was worth it given the additional flexibility and choice they were offered as a result.

*Moving PSB programming to subscription digital channels would put economic pressure on people to 'keep up with the Joneses' in order to watch what other people are watching*

Birmingham

There were also some specific concerns voiced in relation to news in particular. The credibility of all kinds of news programming was mentioned by participants. As discussed, the news output from the main five channels was broadly trusted. There were more concerns about that which was provided on the digital channels. Partly, this was driven by a lack of familiarity with these channels; participants simply did not know enough about them to be able to build positive associations with them as they had with, for example, the BBC. With regard to the digital commercial channels there were often questions over the credibility of their news output; simply as a result of their commercial status, some participants wondered whether they had other agendas to work to over and above providing factual content. This was felt to be less of an issue for younger people, many of whom preferred the more condensed provision of news on channels such as BBC Three.

## 6.4 Attitudes towards the main TV channels online services

Attitudes towards the provision of content online by the main broadcasters are changing.

The importance of TV broadcasters providing additional content on the internet was recognised by just over half of the public (53%). This figure rises to seven in ten (70%) for the 16-24 age bracket, and, perhaps unsurprisingly, online content is also more popular among those with broadband (also 70%) and daily internet users (73%).

Those groups less enthusiastic about broadcasters providing additional content online include people from social group C2DE (48%), those with no internet access (27%) and older people. Among over 65s, around a quarter (27%) said that additional internet content was not an important function of the main broadcasters.

The quantitative survey also asked about 'on demand' television online. Around two in five people (44%) think that it is important that the main TV channels provide websites that allow viewers to watch TV programmes when they want. Again, this option is most popular with young people (56% of 16-24s agree) and those with broadband access (59%) and daily internet users (61%). The groups least interested in this kind of content were older people (36% of the 55-64s and 24% of the over 65s) and those without access to the internet (22%) or who currently only have the main channels (29%).



## 7. The provision of Public Service Broadcasting in the future

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This chapter explores how the delivery of PSB may need to change in the future, in light of the changes to society, along with the pressures on the broadcasters, and the changes in access to and availability of content on digital channels and the internet. This chapter includes discussions on future platform delivery, types of programme content and the importance of plurality. The deliberative workshops also explored people's willingness to pay to maintain current levels of PSB provision.

When thinking about the future, participants from the deliberative workshops thought that television will continue to play an important role in society. However, there was a perception that the ways in which content is accessed will change. Participants believed that there will be a rise in people using the internet and, after digital switchover (DSO), digital channels will rise in prominence. Despite this, even after DSO, the vast majority of participants believed that the main five channels will remain key destinations for PSB content, due to issues around navigation and the perception that these were credible, trusted and familiar sources of information.

There was a perceived need for plurality in the future. Many participants believed that, as a result of issues arising from ease of navigation, the main five channels will remain the destination of choice for many. Consequently, participants felt that it would be important to provide plurality by programme type on the main five channels in the years ahead. This was particularly true for the key PSB genres such as the UK network news and regional/national news. The majority of participants felt that at least one of the main channels, in addition to the BBC, should show PSB programmes in the future.

Both research studies show strong support for the provision of a range of programme genres on the main channels, despite growth in digital channels and online access. Support was strongest for the news, and then for regional/national news, current affairs and serious factual programmes.

The quantitative survey asked which programme types need to remain on the main TV channels in the future and which don't need to be shown on the main channels as long as the content is available on either digital channels or the internet. The majority of respondents still thought that most programme types should continue to be shown on the main channels. Support was strongest for news. Nine in ten (92%) believe that news programmes should be shown on the main channels, while three in four (74%) think the same for news about their nation/region and current affairs. The programme types that the least number of people thought needed to be shown on the main TV channels in the future were the ones which catered for niche interests, although still roughly two in five people were supportive: arts programmes made in the UK (42%) and religious programmes made in the UK (37%). These results

support the view voiced by some in the deliberative workshops that in the future digital channels could become the home to niche programming.

In the deliberative workshops, when asked whether any programme types could move onto either digital channels or the internet within the context of financial pressures on the main channels, participants were prepared for some programme types to shift onto other platforms. Parents were prepared for children's programmes to be provided on digital channels and this was seen to have advantages of safe, dedicated, clearly sign posted space, and convenience. When thinking about the internet, many participants felt that educational content, and specifically schools' programming, could be moved onto this platform. It was believed that learning is both a solitary and interactive process and, therefore, one which is more suited to the internet than television. (For both children's programmes and schools programmes there remained high levels of support for plural provision to provide a diversity of viewpoints and choice.)

There was a relatively conservative attitude towards the idea of showing some PSB content solely on digital channels in the future.

Concerns about navigation and 'findability' were referenced in relation to the digital channels. To help overcome this, some participants suggested that the main broadcasters develop their portfolio channels on niche lines, as is the case with the children's digital channels. Some believed that the broadcasters were already heading in this direction; BBC Three was seen as being a destination site for UK Comedy, while More 4 was praised for its documentaries.

Participants also urged caution in relation to putting content online; they still had concerns about their ability to find trusted content on the internet and, consequently, suggested that the main broadcasters advertise PSB 'destination' sites so that people know where to go.

In the deliberative workshops participants were made aware of the financial pressures on the broadcasters, the current funding of PSB on the commercial channels and the challenges they face in maintaining current levels of PSB provision. Within this context, participants were asked about the extent to which they would be willing to pay more for the same level of PSB provision in the future. Instinctively, many reacted against paying more. This was in part because the broadcasters, and the BBC in particular, were not perceived as spending their money wisely in some places; the high salaries paid to certain presenters was seen as indicative of this.

On balance, however, the majority of participants concluded they would be prepared to pay more in the future due to the important role that PSB and plurality in particular, plays in society. However, if this were to be the case, then participants were keen to have reassurances that the money would be spent wisely. Furthermore, many participants were of the opinion that any price rise would need to be communicated carefully to ensure buy-in from the public more generally.

## 7.1 Thinking about the media landscape in the future

The deliberative research encouraged participants to think about the future. In order to aid this process it was important to describe the current media landscape and likely future developments. Participants were informed of some key developments in media access now and in the future which are summarised below:

- Over eight in ten households have access to multichannel TV (Quarter 4 2007).
- The digital switchover started in 2007 and will be completed in 2012 when the UK will switch off its analogue signal. After this date everyone in the UK will have access to a range of other channels, either free-to-air or subscription.
- Over half of UK households have access to broadband and internet access, and is expected to grow.

## 7.2 Watching television in the future

With this media context clear, participants in the deliberative workshops considered how they will watch television in the future. The majority of participants felt that, in the future, television will continue to play a key role in people's social lives and, by extension, will have an important part to play in educating and informing society. And, as broadcasters compete for audience share, there was a sense that they would look for new ways in which to engage the viewers. (As part of this, some participants were of the opinion that television programmes in the future would be far more interactive and would look to directly involve the viewer in both the direction, and outcome, of each individual programme.)

More generally, however, there was a perception that *the ways* in which we access TV content will change. In the first instance, of those aware of the rise

*On Demand services will change people's viewing habits as it will fit in around their lives rather than people fitting their lives in around TV*  
London

in on-demand services (typically the younger participants), there was a view that these will increase in prevalence and

importance over the coming years. Participants mentioned how, in the future, it is likely that people will have *more* demands on their time rather than less as they seek to balance both work, family and leisure related activities. **Therefore, accessing a service which will mean that the programmes that people want to watch can be viewed at a time that is convenient to them is likely to rise in popularity.**

**Many participants in the workshops were of the opinion that the viewer will have more choice in how they access content in the future.** Most

typically referenced the internet in relation to this and felt that, in the future, the internet services which are being pioneered today will be an accepted facet in the delivery of PSB. Some went so far as say that, in the future, they expect that

*In the future, TV will be combined with other computing functions and it will all be located on one PC or device*

London

TVs and PCs will be one integrated unit to facilitate this. Alongside this, many thought that there would be an increase in the number of people who download content to watch via their mobile phone or iPod. **The main driver for this was thought to be convenience in that people could watch programmes at a time and in a location that suited them.**

Some, however, were worried about these developments. For them, the real benefit of television was the social cohesion that it can, potentially, bring about. They felt that with an increasing ability of accessing content in a variety of ways and places, there would be less of a likelihood that people would sit down together to watch a programme and debate the arising issues. Some also voiced concerns about the potential downsides of increased choice, as people may seek out content which matches their views and there was a risk of people not being challenged and may become tunnel visioned. The power of serendipity of awakening interest in a subject that the main channels were seen to possess, may also be reduced. This view was generally expressed by older participants.

There were however, other older participants (tended to have retired earlier, and were often of higher socio-economic groups) who did not share their concerns. In the first instance, they felt that the role and function of television

*I remember it like it was yesterday – the first television we had. It was amazing – and then it just became something that you expect. It's the same with kids watching TV on their mobiles – it's just a part of life*

Reconvened

is now so embedded in society that it will require more than a change in technology to displace this. More importantly, this group of participants were generally not afraid of change and, instead, embraced it.

These participants tended to mention how, when growing up, their family had purchased their first television and that there had been much debate at the time about the impact that this might have. They stated, as with all other major changes, this was one which simply became an accepted way of life over time. They saw no reason why the changes discussed in relation to the provision of PSB in the future would be any different.

### 7.3 The importance of plurality in the future

Plurality was of vital importance to the majority of participants and, when thinking about the future, their views on this remained broadly unchanged. During the deliberative workshops many believed that, even after DSO, there will be a real need to maintain plurality on the main channels. Driving this was

the perception that, the main five channels would remain the prime destination for viewers due to issues of trust and ease of finding content.

Participants felt there was a real need for the UK network and national/regional news to continue to be provided by more than one of the main channels. This issue was also discussed, and broadly endorsed, in relation to current affairs and serious factual programmes. Plurality of UK drama and UK comedy were also seen as important for participants.

As society continues to diversify, many in the deliberative workshops believed there would be a need to provide key content in a variety of styles and on a variety of platforms to ensure it is accessible by all and appeals to a range of tastes.

However, it should be noted that participants' strength of feeling about whether programmes should continue to be shown on the main TV channels was in direct correlation with the extent to which they believed the programme type was important. So, as news was considered to be very important both for the individual and society as a whole, the vast majority of participants believed that it needs to be shown on the main TV channels.

## 7.4 Attitudes towards platform substitution

Both the qualitative and quantitative studies explored the issue of platform substitution – moving PSB onto different platforms. This was within the context of making hard choices about which platform content could be provided on, against a backdrop of the financial pressures on the main broadcasters and the understanding that delivery of content either via digital channels or the internet could save money. Generally, a largely conservative attitude emerges, with the majority of people wanting to see PSB remain on the main channels. This again especially applies to the programme types deemed the most important, such as news and current affairs.

Even after considering ways in which the provision of PSB might change, voting by participants showed that nine in ten (90%) believed that *news programmes need to be shown on the main TV channels after DSO*. Only one in eleven (9%) stated that *news programmes don't need to be shown on the main TV channels so long as they are shown on the digital channels*. Only 2% thought that *news programmes don't need to be shown on the main TV channels so long as this type of content is on the internet*.

This sentiment was also evident, though to a lesser degree, when participants considered the platforms that news about and for people in their area should be shown on after DSO. Over four in five (83%) agreed that *news programmes about and for people in my region/nation need to be shown on the main TV channels*. One in six (16%) stated that *news programmes about and for people in my region/nation don't need to be shown on the main TV channels, so long as they are shown on the digital channels*. Only 2% thought *this content could be provided online*.



Furthermore, while serious factual programmes were considered to be of real importance, some participants (23%) were prepared to see this content moved to digital channels, whereas three quarters (76%) believed that *serious factual programmes need to be shown on the main TV channels*. Only 1% thought this content could be provided on the internet.

With regard to UK comedy and UK drama, some participants thought this type of content could be delivered via the main broadcasters' portfolio channels. For some, and especially younger participants, shifting these types of content to the main broadcasters' portfolio channels represented an improvement from the situation today. This was due to their perceptions of the convenience and additional choice that the digital channels can offer. For others though, and especially those unused to accessing content in this way, they were more reluctant to see content moved to the digital channels and felt they were faced with hard choices about content priorities. They believed that if any types of programmes needed to be moved to the main broadcasters' portfolio channels, then UK comedy and UK drama were the least worst options to shift given the importance they attached to other programme types such as the UK network news and current affairs.

Extending this debate further, participants did not believe that, in the future, there would be a need to ensure provision on the main five channels for children's and schools/educational programming as long as this content was provided on the digital channels for children's content and online for educational content. Partly, this was driven by the perceived viewing figures for these types of programmes. Given that they were considered to be lower, it was believed that those that *really* wanted to access such content would make the effort to find it on the digital channels or online. (However, plurality in provision was still seen as being important to ensure quality standards and choice.)

Regarding children's programmes in particular, other, more detailed, arguments about provision on the digital channels also emerged that were seen to offer specific benefits. For some, and particularly those that were parents of young children, dedicated channels for children appealed. They considered that they provide a 'safe' place for their children to watch programmes which were regulated and were not interrupted by programmes not designed for children. They cited CBBC and CBeebies as existing examples of children's channels which provide trusted quality content. Other participants, however, still felt that children's programmes should be provided, at least in part, on the main five channels. It was thought that this would lead to higher quality standards and, furthermore, would ensure diversity in provision on the main five channels. This difference of opinion is seen in the voting results. Half of participants stated that *children's programmes need to be shown on the main TV channels* with around the same proportion stating that *children's programmes don't need to be shown on the main TV channels, so long as children can get them on the digital channels* (51% versus 48%). It should be remembered, however, that this vote involved *all* participants in the

workshops – not just those that were parents – which may have affected the outcome.

Regarding religious programming, participants believed that this could move in its entirety to the digital channels. This was because it was believed that

*Religion is not needed on the main channels – it can be moved to digital as a small number of people watch it*  
Durham

these programmes have very low viewing figures and, therefore, the airtime could be better utilised by concentrating on those types of programmes which were considered to

be important by a larger cross section of society. Indeed, of those participants in the workshops from a strong religious background, they mentioned how they currently use the digital channels in order to access this type of content, often via the *GOD Channel*. They believed that accessing content in this way is not an issue for them and that, in time, they would be able to find what they wanted to watch. Personal faith seemed to be the deciding factor in the perception of utility of religious programming; it was not the case that participants believed that people thought that this programming was important because of others with religious beliefs.

The quantitative findings showed that when asked which programme types *need* to be shown on the main TV channels in the future, news emerged as by far the most supported genre, with 92% saying that it should remain on the main channels. Other genres with high support include news and information about your region/nation (74%), current affairs (73%) and entertainment (72%). These are followed about news about your local area (70%), dramas that reflect life in the UK (65%) and children's programmes that reflect life in the UK (64%).



Figure 7.1: Respondents' views on what genres should remain on PSB

Q43. In the future, it may be the case that the main TV channels may not be able to provide all of the types of content we have been talking about. Which of these statements is closest to your views: **Needs to be shown on the main TV channels**



Source Q43: 2,260 interviews with UK adults aged 16+, October - December 2007

Many fewer members of the public felt that in the future PSB programming could be moved from the main channels to other platforms, although there were some genres where it was felt that this was more acceptable than others. The genres that the least number of people thought *needed* to be shown on the main TV channels include religious programmes (37%), arts programmes (41%) and programmes for schools (53%). This reflects feeling that digital channels are more appropriate for some "niche" programme types, although with some concerns that this will cause people's viewing habits to become restricted, as they are less likely to find this type of content by stumbling across it, as was the case if shown on the main TV channels.

Views on platform substitution did, however, vary between different groups. For many participants in the qualitative research, the digital channels were becoming an increasingly important element in how they accessed PSB content. This was particularly true of younger participants and those with families. Essentially, the digital channels not only provided more choice for these participants but, importantly, they represented a more convenient means of enabling them to watch what they wanted at a time that suited them.

Therefore, to those who already had multichannel TV in their homes, the prospect of transplanting some PSB content onto the main broadcasters' portfolio channels in the future was not seen as being problematic.

Specifically, this should be content that is not relevant to the majority, but very relevant to the minority (e.g. children's, educational/schools and religious programming). They believed that even if they had navigational issues initially, then this would be something that they got used to in time. They also believed that the commercial digital channels would have a role to play here – particularly in providing PSB content from overseas which they believed would help people's understanding of different perspectives and cultures.

This is supported by the quantitative research. Television viewers with only the main channels are, perhaps unsurprisingly, generally more likely to say that in future a genre needs to continue to be shown on the main TV channels. This is particularly true of news (95% and local news at 77%), entertainment (79%), drama (74%) and sport (66%). On the other hand, those with access to cable or satellite television are significantly *less* likely to see the need to continue showing public service genres on the main channels: the figures for this group are news (90% and local news 71%), entertainment (68%), drama (61%) and sport (54%) respectively.

When asked about whether PSB content could be provided on digital commercial channels in the future there were some concerns expressed. In the main, participants recognised that these channels have a commercial imperative and that this in itself may be at odds with providing content that could be considered educational *and* informative. Additionally, a few stated that the digital commercial channels often have a global reach and, therefore, the chances of them showing UK content would be reduced. In relation to providing content on subscription channels in the future, there was also a reluctance to pay for content which participants felt strongly should be available to everyone. Given the social importance placed on PSB, many believed that restricting access to those that could afford to pay would be against the ethos of PSB.

### **Concerns about platform substitution**

However, there were general concerns voiced by some participants about moving content onto digital channels as they felt it could be harder to find quality content. They believed there would be so much choice presented to them that they would struggle to find what they are looking for as they currently can on the main five channels. These concerns were generally restricted to older participants and those who, currently, do not have access to multichannel TV. While they wanted choice in what programmes they watched within any given genre, there was a sense that this 'choice' may be rendered meaningless if they could not actually find who was providing the content they wanted and when it was being shown.

To remedy this, some participants (and particularly those that were younger) who currently have access to the digital channels suggested that the main broadcasters' portfolio channels should develop distinct roles and functions and that there should be more 'destination' channels which focus on a particular programme type. To highlight, they mentioned how they perceive that BBC Three has a role in developing and nurturing new UK comedy programmes, while More 4 was seen as being a channel which concentrated on UK Drama, serious factual and current affairs programmes. These participants stated that if this principle were developed in the future then it would help not only ensure plurality of provision but would also encourage associations with certain channels which would help viewers find the types of programmes that they wanted to watch.

*Digital can offer more niche programmes without having to worry about appealing to mass audiences*

Birmingham

There were, however, some concerns about this approach. Participants thought this would minimise the likelihood of people 'stumbling' across content which they watched purely out of interest. In this sense, it was wondered whether people's viewing habits would become more restricted; they may simply turn to the channels which they know they like rather than trying anything new. Thus, the educational role of PSB may be diminished.

### **The role of the internet in the provision of PSB content in the future**

Participants believed that, certainly in the near future, the internet could complement content provided on the main five channels or digital channels but could not act as a replacement. There were a number of barriers highlighted by participants that led to their opinions on this and these are highlighted throughout the remainder of this section.

### **Concerns**

In the main, participants were concerned about a **lack of access** to the internet. Furthermore, it is important to note that the term 'access' had a number of connotations. Firstly, there were questions on the rate of internet penetration and, while participants recognised that this was growing, it was not believed that it would reach the same rates as that of multichannel TV by 2012. Consequently, given how many believed that PSB should try and cater for many different groups in society, participants believed there would be a risk that by providing content solely over the internet certain groups in society (such as the elderly, those with long-term health conditions or the financially vulnerable) would be automatically excluded from accessing this.

To some though, an ability to 'access' PSB content online was not simply a question about whether an individual had the appropriate technology but, moreover, regarded whether they had the **right skills** and **confidence** needed to do this successfully. While this was seen as less of an issue for

younger people, there was a sense that many people would be unable to find the content they wanted simply as they did not know how to.

There was also a great deal of **uncertainty** over the extent to which content provided on the internet **can be trusted**. This issue was particularly raised by older participants and those with fewer IT skills. As they did not have the experience of using the internet to search for information, they were unsure what level of detail it would provide and how credible its content would be. Trust, however, was an issue that was raised more generally by participants. Of those that regularly used a computer, there was a sense that the websites provided by the main five broadcasters could generally be felt to be trustworthy. This, to a large extent, was driven by views of the broadcasters themselves; for example, those who watched the BBC Network News had no issue in turning to the BBC's website for news information as they believed that the data would come from the same source and, in their experience, it could be relied on. There was, however, scepticism about the credibility of other sources of information on the internet. Wikipedia was frequently referenced in relation to this given users' ability to edit content.

In relation to this, there were questions raised by participants about **how they would find content that they trusted and that they wanted to access**.

To mitigate this, some suggested that efforts should be made by the broadcasters to raise awareness of PSB 'destinations' on the internet. It was thought that this could be done by signposting the relevant sites after a programme on the television. Participants not only thought that this would help them find PSB content more easily but, as the website highlighted had been 'endorsed' by the broadcaster, the content on it would be more trusted.

*It would be good if they could list a website which may be of interest after a programme*  
Edinburgh

In addition, participants stated that one of the appealing features of the provision of PSB via the TV was that it was possible to simply 'stumble' across a programme which one was not expecting to watch and learn from it. This randomness was considered to be a feature of the platform – and not one which was transferable to the internet. Participants stated that, in order to find content, they would need to use precise search terms. Therefore, the likelihood of having their views challenged or knowledge expanded 'by chance', as can be the case with the provision of PSB on the television, was believed to be minimised.

In spite of these misgivings, however, participants believed that certain types of content could be moved to the internet in the future instead of being shown on the main five channels. Most typically referenced here was schools/educational content. The main driver behind this was that learning was seen as an interactive process, and something which required user involvement. To this end, the internet was seen as more appropriate than the television which was largely seen as being a passive means of receiving

information. It is important to remember that the majority of participants believed that the television has a strong social role to play; it was seen as an ideal vehicle for bringing friends and family together. Conversely, the internet was seen as a more solitary activity; something which was partly driven by where computers were typically located in participants' homes – in a quiet space away from the main family rooms. Learning was also viewed as something which was undertaken alone and, therefore, the internet was viewed as being a suitable tool through which such information could be provided.

*The internet is different, it's an individual experience so educational programmes could be put on the internet rather than TV. Then you can access the information from anywhere at anytime*

London

Finally, some made the point that those actively learning a subject are often enrolled in a course being run through a school or college. They were of the opinion that these institutions have dedicated IT facilities and, therefore, physical access to the technology would not be an issue. As a result, it was not believed that by providing educational content online that those seeking this would be excluded from doing so.

### **Priorities for the future: main channels, digital channels and the internet**

Opinion was polarised about whether the main broadcasters should focus on their digital channels and online services in the future or on the main channels. Over half of participants believed that *the main five broadcasters should focus on their main TV channels* and over two in five stating that *the main five broadcasters should develop their digital channels and online services* (56% versus 44%).

## **7.5 Paying for PSB in the future**

In the deliberative workshops participants were made aware of the financial pressures on the broadcasters, the current funding of PSB on the commercial PSB channels, and the challenges they face in maintaining current levels of PSB provision. Within this context, participants were asked about the extent to which they would be willing to pay more for the same level of PSB provision in the future.

In order to aid discussion participants were presented with charts detailing three hypothetical scenarios; one showing the same amount of PSB as today, one showing more and one showing less. After discussing the principles of these charts, to gain an understanding of how much PSB was perceived to be enough, we then attached some cost estimates to these charts so participants could get a realistic sense of how much they would need to pay if they wanted to see the same amount of PSB shown today in the future.

Faced with the choice of less PSB, or paying more for the same amount that is shown today, many participants spontaneously stated that they would

rather the amount of PSB reduced to ensure there is no rise in price. Upon discussion, on balance a small majority agreed they would be prepared to pay more in the future, due to the important role that PSB plays in society and within this their perceived importance of plural provision.

Some participants expressed an initial preference for a reduction in the amount of PSB shown. This was something of an instinctive reaction to being asked to pay more money, however, and should be considered in light of contextual data. First and foremost, participants felt that, generally, the costs of living within the UK are increasing. Participants spoke of having to pay more tax and, at the same time, how this was not matched by any discernible rise in the quality of public services. Those services provided by Local Authorities were particularly mentioned in this respect.

Alongside this, however, there was sense that perhaps the broadcasters, and the BBC in particular, are not making the best use of the money that they

*The BBC should look at the salaries it pays rather than charging the public*  
Edinburgh

already have. Participants spoke frequently and at length about what they considered to be the inflated wages of certain TV stars. Certain individuals were not considered to provide 'value for money' proportionate to the wages

they are reportedly paid. Furthermore, many recognised that these presenters concentrate solely on providing light entertainment programmes and, in order to meet the increasingly diverse needs of society, this money may be better invested in other programme types, specifically the UK Network and regional/National news, current affairs and serious factual.

However, on discussing the issues, many began to see the potential increase in price in order to receive the same amount as PSB as today as not being that significant. In essence, the provision of PSB was seen as an important service, and one which was believed could play a potentially increasingly important role in society going forward. When compared to other costs, the extra funding in order to guarantee the provision of PSB in the future was not believed to be out of proportion.

*You can spend £100 on a night out, so £160 for a year of PSB is nothing*  
Birmingham

These discussions also considered the hard choice of reducing content on either the BBC or on ITV1, Channel 4 or Five, in order that there was no need for an increase in costs for providing PSB. Opinion was mixed. In the initial workshops, for many, the BBC was considered to be the prime provider of PSB and many thought it an international, respected brand and it was important to preserve its role in the provision of PSB as a matter of priority. In the reconvened workshop many participants thought the overriding priority was to maintain plurality for what were considered to be the key programme types was believed to be key and there were concerns that were the BBC the main – or only – provider of certain types of PSB programmes then the quality

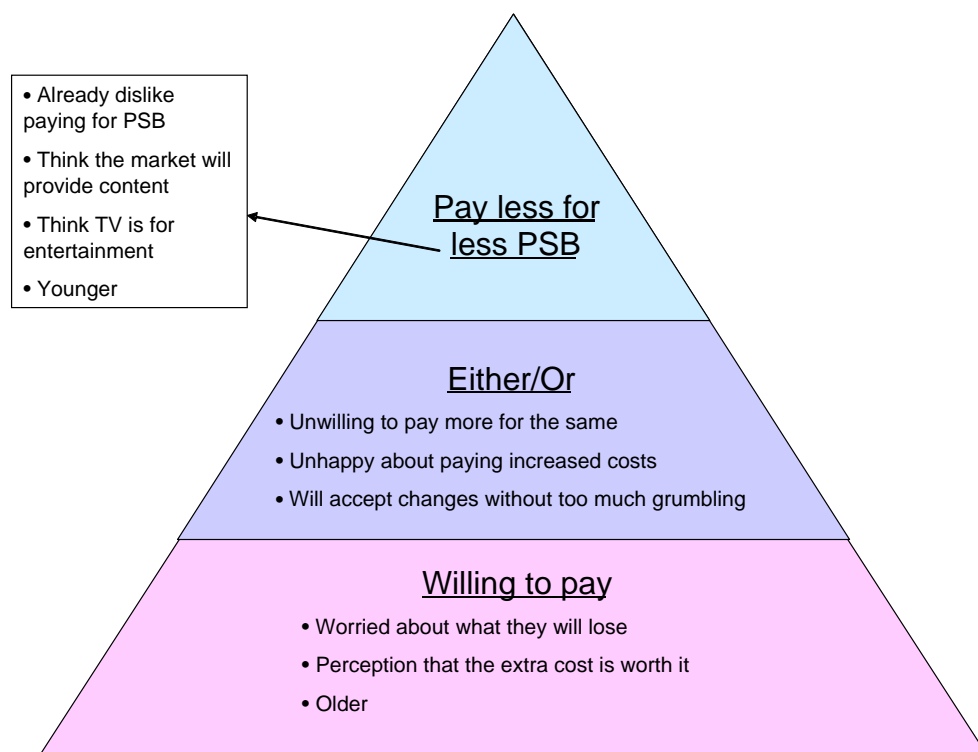


of them might decline due to a lack of competition. Overall, however, the main conclusion for the majority was that these choices were extremely hard and that people preferred to see an increase in costs to maintain current levels of provision. It was generally thought that reducing the amount of PSB could lead to some serious consequences for the future of television generally.

Attitudes towards this are shown in the voting results from the workshops. While three in ten participants agreed that *as long as the BBC shows PSB programmes, the other main TV channels should be allowed to show what they like*, over seven in ten thought that *at least one of the main TV channels, in addition to the BBC, should show PSB programmes* (72%).

Looking at the issues of willingness to pay in more detail, participants fell into three key categories: the majority who were willing to pay more for the same amount of PSB – as discussed above; those who were not willing to pay but believed they would get used to the price increase; and, those who wished to pay less and did not mind receiving less PSB in the future. These three consumer segments are outlined in figure 6.2.

Figure 7.2 – Preparedness to pay for PSB to maintain current levels



Exploring these consumer segments in more depth, the least numerous group were those that wished to pay less but, at the same time, were not concerned that this would lead to a decrease in the amount of PSB shown. This group



were much more technologically able and so, increasingly, were less reliant on the television as a means of accessing content. Instead, they used the internet, mobile phones, download facilities via on-demand services as a means of finding programmes that they wanted to watch. As could be expected, this group tended to be younger, and it was a minority view.

Given that they no longer used the television to the same extent as other people within society, they saw less of a reason why they should pay more for it. They believed that even if there was less provision of PSB on the television, they would still be able to find means of accessing this content via other channels. Furthermore, many within this group also placed less importance on the provision of PSB. They believed that the primary function of television is to *entertain* rather than *inform*.

*The Internet is a free source of information which I would use if the other channels didn't have PSB*  
London

In addition, there was a feeling among this group that even if there was no requirement on broadcasters to produce PSB, they would still do so anyway because of they believed there is a natural demand for this type of programme. Moreover, this group were less concerned with who the producers of these kinds of programmes might be in the future; they did not see any problem if, for example, all serious factual programmes were produced by a commercial digital channel.

*Whatever the obligations, other people would show these programmes*  
Birmingham

Finally, compared to other spending priorities, this group felt that funding PSB was fairly low down on the list. They believed there to be more important issues in need of tackling, such as social housing, education and the NHS, and felt that public funds should be diverted in this direction in the first instance. They believed that improved provision in these sectors would benefit society more than ensuring the level of PSB would.

*It is our social obligation to invest in health and education and not in encouraging people to sit in front of the TV*  
Swansea

The second group were those who were not happy to pay more, but believed that, in time, they would accept this. This group tended to comprise individuals in middle-age, with families, who felt that they bore the brunt of increased costs of living more generally. Therefore, while they were not happy about paying more, they felt that this would be simply another cost that, in time, they would learn to absorb. It seemed that, as a result of the life stage of these participants, they often made great use of certain types of programmes that were classified as PSB; particularly children's programmes, UK drama and UK comedy.

This group were happy to admit that they preferred receiving information passively. They stated in order to access information from the internet, a certain degree of pro-activity was required. Therefore, while they did not want to pay more in order to guarantee the same levels of PSB shown as today, they were happy to do this for the sake of convenience if it meant they would be able to access information easily via the television.

*Subconsciously, we're saying we're lazy. We can't be bothered to go and look at a laptop to the extent that we'd rather pay more money than look into a different way of getting information*

Durham

A majority of just over half participants fell into the final group; those that were willing to pay more in order to receive the same amount of PSB as is

*I would pay more for PSB. You have to pay if you want quality*  
London

shown today. As a result of the discussions, this group dwelt on the importance of PSB in society and the useful role it can play in educating, informing and fostering understanding

between different groups in society. Given their perceptions of how society is continuing to change, they believed that there could be negative consequences for the wellbeing of the nation if the amount of PSB shown were decreased. However, this group did urge caution. They felt strongly that if they are to be expected to pay more in the future, then they need to have some assurances in place about where this extra money will be directed.

Many felt that if a decision were to be taken to increase costs as a means of ensuring the same level of PSB provision that is shown today, then this will need to be communicated carefully to the wider public. Participants were well aware that, as a result of being exposed to the key facts and different arguments throughout the workshops, their thought processes around the value of PSB, and what it is worth in monetary terms, would be different to that of the public at large. Therefore, in order to ensure a receptive public reaction to any cost increases, some were of the opinion that the broadcasters and regulators would need to ensure that society generally were aware of the arguments and understood the evidence base that had led to this decision being made.

*They would need to explain to people what it's all about- they might be willing to pay a bit extra if they were aware*

Durham

# Appendix

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## A1. Discussion guide for the regional/national workshops

### J31644 – Ofcom PSB Review 2007

#### Discussion guide

| Description   | Comments  | Time          |
|---|---|---------------|
| <b>ARRIVAL AND REGISTRATION</b>   |   | 9.30-10.00    |
| <b>1. PLENARY SESSION 1 - INTRODUCTION</b><br><br><b>a. Introduction by Chair and initial IML voting session – Warm up</b> <ul style="list-style-type: none"> <li>– Thank participants for taking part</li> <li>– Introduce Ipsos MORI moderators and note takers</li> <li>– Role of Ipsos MORI – research organisation, gather all opinions: all opinions valid, disagreements OK</li> <li>– Brief Introduction about Ofcom – mention that Ipsos MORI is carrying out this project on behalf of Ofcom, the UK communications industry regulator, who are carrying out a review of current television provision and the future of television. Later this morning, Ofcom would like to talk a bit more about who they are and the project. In the meantime though can I just introduce you to the team from Ofcom?</li> <li>– Confidentiality: reassure all responses will not be traced back to individuals</li> <li>– Explain that note taker will transcribe for quotes, no detailed attribution</li> <li>– We will be spending the day in this room as a group and in smaller discussion groups to hear your views on television.</li> <li>– There will be a coffee break in the morning, lunch and coffee break in afternoon.</li> <li>– We will definitely finish at 5pm.</li> </ul> <b>b. IML initial vote: - Explain this is their chance to express their views in private.</b> | General introduction: outlines ground rules of the day and housekeeping | 10.00 – 10.20 |

|  |   |               |
|--|---|---------------|
| <b>2. BREAK OUT GROUPS 1 - Warm up session: Using television and a basic introduction to PSB</b>   |   | 10.20 – 11.20 |
| <b>a. Scene-setting:</b> <ul style="list-style-type: none"> <li>Get participants to introduce themselves to each other: e.g. NAME, WHERE THEY HAVE COME FROM</li> </ul>  | General introduction to each other- will be in break out groups all day   | 3 mins        |
| <b>b. Watching Television</b> <ul style="list-style-type: none"> <li>What types of programmes do you like to watch on television? PROBE IF NEEDS BE – WHAT DID YOU HIGHLIGHT IN THE COPY OF RADIO TIMES THAT WE HANDED OUT? Why? (<i>Moderator to note down reasons/ qualities that are mentioned to refer to later. If you think it is needed, mention they shouldn't worry about saying programmes like X Factor etc</i>)</li> <li>When do you watch them? Who do you watch them with?</li> <li>What about people in your household? What do they watch and why?</li> <li><b>MODERATOR ONLY ASK ABOUT PLATFORMS IF THERE IS TIME</b></li> <li>Do you use any of the following to watch TV programmes? [<i>PROBE ON reasons for using:</i> <ul style="list-style-type: none"> <li>TV over internet</li> <li>On demand services (TV catch-up)</li> <li>PVR (Sky+)</li> </ul> </li> </ul>   | Gentle warm-up on the types of thing they like to watch on TV<br><br>To get participants starting to think about other ways of accessing content  | 5 mins        |
| <b>c. Perceptions of programmes with social value today</b> <ul style="list-style-type: none"> <li>Thinking about some programmes you have watched recently, what impact have they had on you?</li> <li>Have you seen programmes that you learnt something from? Discovered something? Made you do something differently?</li> <li><b>And to what extent do you think that TV has a role to play in society? What kind of role? Or is it just for entertainment?</b></li> <li>REFER TO PROGRAMMES THEY CIRCLED IN RADIO TIMES TO EXPLORE ISSUES</li> <li><b>Thinking about people in your household – what sorts of programmes would you choose for their benefit? That you think are good for them? Why?</b></li> <li>Thinking about society, people in general, the country as a whole, <b>which programmes / types of programmes stand out being good for society? Why?</b></li> <li><b>What kind of programmes do you think reflect life in the UK? [<i>PROBE FOR (a) for which programme types is it important?(e.g. drama, comedy, news about country/region), (b) whether or not it is important that these kinds of programmes take place in UK and why? Do they have a social value? Why?</i>]</b></li> <li>Imagine if there were no programmes that took place in UK – what would you miss and what we miss as a society?</li> </ul> | <b>MODERATOR NOTES:</b><br>a) <b>DO NOT USE THE TERM PSB HERE</b> – THIS IS FOR OUR REFERENCE ONLY.<br>b) NEED TO BEAR IN MIND THAT THE FOCUS NEEDS TO BE ON <b>UK MADE PROGRAMMES</b> .<br><br>Trying to get at how participants value public service broadcasting/content without using the term PSB/PSC yet. We also try and get some idea of whether PSB has had any 'impact' on them and broader society<br><br><b>PLEASE MAKE SURE YOU USE UK NOT BRITAIN/BRITISH</b> | 7 mins        |
| <b>MODERATOR; MAKE SURE YOU PROBE ON THE NEXT QUESTION: THE ISSUE OF MAJORITARIAN VIEW VERSUS MINORITARIAN IS KEY TO THE</b>   |   | 10 mins       |

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| <p><b>STUDY</b></p> <ul style="list-style-type: none"> <li>– <b>How far do you think TV should show programmes which cater for different interests?</b><br/>Which channels should cater for a mass audience and which for specific audiences? E.g. some people may be interested in current affairs and others in soaps.</li> <li>– <b>Or do you think it is ok to <u>just</u> show programmes that are popular with a lot of people?</b></li> <li>– And what about programmes which cater for different audiences? Young? Old? Children? Is this important? What other groups of people can you think of? Is it important to cater for different audiences? Why? Why not?</li> <li>– <b>We've been talking about programmes that are good for society. Which TV channels provide these kinds of programmes that have a social value?</b> <i>[PROBE ON: is this type of programming limited to certain channels? Prompt on digital commercial channels if they don't come up, e.g. Discovery Channel?]</i></li> <li>– <b>Are there differences between BBC and the other main TV channels?</b></li> <li>– <b>Are there differences between main TV channels and the digital commercial channels?</b></li> <li>– <b>What kind of differences are there in the types of programmes shown on these different channels? PROBE FOR QUALITY, UK VERSUS NON UK.</b></li> <li>– Is it important to show programmes that are good for society on the main 5 TV channels? Why? Why not? Is it important that they are shown on the digital TV channels? Why (not)?</li> </ul> <p><b>d. Benefits and drawbacks of programming with a social value</b></p> <p>MODERATOR NOTE:<br/><i>During following questions, probe on:</i></p> <ul style="list-style-type: none"> <li>- <i>benefits for different social / cultural groups.</i></li> <li>- <i>whether these programmes should be made to be watched by many people or whether programmes are better for specific groups/interests</i></li> </ul> <p><b>MODERATOR TO SPLIT BREAK OUT GROUP INTO TWO – HALF TO DO BENEFITS AND HALF TO DO DRAWBACKS. ASK THEM THEN TO REPORT BACK.</b></p> <p><b>Group A</b></p> <ul style="list-style-type: none"> <li>– What are the benefits of these types of programmes? Why?</li> <li>– Are there any groups of people which benefit most from these types of programme? Why?</li> <li>– What would we lose without programmes that are good for society?</li> </ul> <p><b>Group B</b></p> <ul style="list-style-type: none"> <li>– What are the disadvantages of providing these types of programmes?</li> <li>– What would we gain if there weren't programmes with a social value?</li> <li>– How would the space be filled without them?</li> </ul> | <p>Moderator Note: Do not want to get into a discussion about access to digital channels</p> <p>This section starts to explore whether participants feel PSB has any benefits and drawbacks. We also start to take a look at whether PSB is for the majority or for different groups in society</p> <p>THIS SESSION IS CREATIVE – AND MEANT TO BE SPONTANEOUS BEFORE THE PRESENTATION OF THE PSB DEFINITION. DO NOT PRESENT THE STIMULUS AT THIS STAGE</p> <p>In this section we get participants to come up with their own descriptions of</p> | <p>10 mins</p> <p>10 mins</p> |
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| <p><b>e. Defining programming which has a social value</b></p> <p><i>MODERATOR NOTE - Aims:</i></p> <ul style="list-style-type: none"> <li>- <i>get participants to come up with a description of programmes which they think have value from a social perspective;</i></li> <li>- <i>refer back to list of qualities made earlier</i></li> <li>- <i>to encourage participants to think about the TV programmes which they liked and which have also been discussed for having some social value;</i></li> </ul> <p>I'D NOW LIKE YOU TO THINK ABOUT THE WORDS YOU WOULD USE TO DESCRIBE THE KINDS OF PROGRAMMES WE HAVE JUST BEEN TALKING ABOUT. MODERATOR TO WRITE ON A FLIPCHART AND PROMPT WITH THE FOLLOWING QUESTIONS:</p> <ul style="list-style-type: none"> <li>- What are these programmes there for?</li> <li>- What is special about these programmes?</li> <li>- What impact do these programmes have on people in society? What would it be like if they didn't exist?</li> <li>- What does it mean to you?</li> <li>- What things are most important to provide?</li> </ul> <p>Which groups in society is it most important to provide programming for?</p> <p><b>ii) Presenting a definition of programmes with a social value</b><br/> <b>Moderator to hand out sheet describing programmes with a social value (Handout 1A) and then after discussion a list of programme types.</b></p> <p>EXPLAIN THAT THESE ARE SOME THOUGHTS FROM OTHER PEOPLE ABOUT THE TYPES OF THINGS TELEVISION CAN DO – SPEND A COUPLE OF MINUTES DISCUSSING WITH YOUR NEIGHBOUR – ANYTHING THAT YOU AGREE/DISAGREE WITH? ANY SURPRISES?</p> <ul style="list-style-type: none"> <li>- Is there anything about this that surprises you? What? Why do you say this?</li> <li>- Are there programmes on TV like this currently? Where?</li> <li>- Is this type of content important to you/ to other people in society?</li> <li>- What types of people are not / poorly catered for by this definition? Does this matter? What types of people are well catered for?</li> </ul> <p><b>NOW HAVE A LOOK AT THE SECOND PAGE (Handout 1B) – THIS IS A LIST OF PROGRAMME TYPES. HAVE A LOOK AND SEE WHICH ONES YOU THINK ARE GOOD FOR SOCIETY? THAT DELIVER THE KINDS OF THINGS DESCRIBED ON PAGE 1? WHICH ONES AREN'T IMPORTANT? HAVE A LOOK WITH YOUR NEIGHBOUR. (GIVE PEOPLE A COUPLE OF MINUTES AND THEN DISCUSS AS A GROUP)</b></p> <ul style="list-style-type: none"> <li>- <b>Which programme types do you think are important? For you? For society? Why? Why not?</b></li> </ul> <p>(Get a list of most important programme types on the flip chart)</p> <ul style="list-style-type: none"> <li>- <b>We talked earlier about UK programmes. Which</b></li> </ul> | <p>television which is good for society</p> | <p>15 mins</p> |
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| <p><b>of these programme types are most important that they are made in UK or take place in UK? Why?</b></p> <p>THANK YOU FOR ALL YOUR THOUGHTS ON PROGRAMMES THAT ARE GOOD FOR SOCIETY. IN A MINUTE OFCOM ARE GOING TO PRESENT THEIR DEFINITION OF PROGRAMMES THAT HAVE A SOCIAL VALUE WHICH IS BASED ON THESE STATEMENTS AS WELL AS SOME PROGRAMME TYPES ON THE LIST. AND WE'LL BE DISCUSSING AND WORKING WITH THIS DEFINITION THROUGHOUT THE DAY.</p> |  |  |
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| <b>TEA / COFFEE BREAK</b>   | 11:20 – 11:35 |
| <b>3. PLENARY SESSION 2: The Future</b><br><br><b>a. IML voting</b><br><br><b>b. Ofcom to do speech – plus 5 minutes at most for Q&amp;A.</b><br><br><b>c. Ipsos MORI presentation on future of television.</b> | 11:35 – 11:50 |

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| <b>4. BREAK OUT GROUPS 2: Reaction to “the future”</b>  | 11.50 – 12.10   |
| <b>a. Delivery in the future</b> <ul style="list-style-type: none"> <li>Thinking about what has just been shown to you, is there anything that surprises you here? Is there anything you think is missing? Why is this?</li> <li><b>What do you think about the role of the internet NOW AND IN THE FUTURE?</b> <ul style="list-style-type: none"> <li>What do you use the internet for? Why? [<i>PROBE ON education and learning</i>]</li> <li>How often do you use it?</li> <li>What are the best things about the internet? What are the worst things?</li> <li>Do you ever use sites provided by the broadcasters e.g. BBC, Channel 4? Sky? Why (not)?</li> <li><b>Do you think websites can provide content that is of social value? That is good for society? Can you think of any websites? Why?</b> How? (e.g. find out new stuff, discover new ideas)</li> <li><b>Are there any differences between what the internet and websites can do compared to television in providing stuff that's good for society?</b></li> <li><b>How easy is it to find what you are looking for on the internet?</b></li> <li><b>Do you ever find yourself stumbling across things that you find interesting on the internet? Does this happen more or less often than on television?</b></li> <li><b>Would you want websites to provide content that has a social value in the future? Is it important?</b></li> </ul> </li> <li>Thinking specifically about TV: <ul style="list-style-type: none"> <li>What do you think TV will be like in this future world (REFER BACK TO FUTURE TRENDS)?</li> </ul> </li> </ul> | <p>Getting people to define how they think the future will be</p> <p><b>AIM TO GET AN UNDERSTANDING OF WHAT THE INTERNET DOES VS TELEVISION? HOW DO THEY DIFFER?</b></p> <p>10 mins</p> |

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| <ul style="list-style-type: none"> <li>– Will it still be a 'box' in the corner of the living room, or will we be watching it on the move? E.g. handheld, in cars?</li> <li>– How will TV be different, how will we interact differently with it?</li> <li>– How will the programmes we watch be different? PROBE ON CHOICE OF CHANNEL, DIGITAL AND WHEN/WHAT TO WATCH (E.G. PVR, OD)?</li> </ul> <p><b>b. Public Service Broadcasting in the future (delivery and content)</b></p> <ul style="list-style-type: none"> <li>– Ofcom just talked about Public Service Broadcasting or PSB provided by BBC, UTV, Channel 4 and Five. What sort of a role can these channels play in this future in terms of providing programmes which are good for society as a whole?</li> <li>– <b>Do you think other TV channels could provide this type of PSB content in the future? (e.g. digital commercial channels)</b></li> <li>– This increased range of channels could mean fewer people watch thought-provoking programmes and are ignored in favour of more entertaining programmes? Does this matter?</li> <li>– What sorts of positive / negative effects would there be if the main TV channels did not have a social role in the future? Which people in the UK would be most / least affected? Why?</li> <li>– <b>How important is it that programmes take place in UK? What sort of social benefit is there to home-grown programmes? What could happen to the provision of UK programmes?</b></li> <li>– <b>What would it be like if there were no more new programmes made that are set in the UK? (e.g. for dramas, comedy, children's, factual, news for/about people in country/region)</b></li> <li>– Are programmes that are good of society more or less important because of these changes happening now and in the future/ Why?</li> <li>– Will the ways of delivering these types of PSB programmes have to adapt to this future world?</li> <li>– E.g. probe on delivery via personal video recorders, internet, mobile phones</li> <li>– Are these different delivery types important?</li> </ul> <p>Are they important for some groups in society? Which ones?</p> | <p><b>Moderator to remind people about DSO in 2012 and fact that many of the digital channels will be free to air.</b></p> <p>This looks at how PSB might need to adapt in the future. NB. We are <b>not</b> expecting people to <b>predict</b> the future only say what they think will be best in the future.</p> <p>Moderator – make sure that UK origination is at the heart of the debate here.</p> | <p>10 mins</p> |
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| <p><b>5. BREAK OUT GROUPS 3: Future Scenarios</b></p>  |   | <p>12.10 – 13.10</p> |
| <p><b>Moderator to present verbal explanation (around the handout) about:</b></p> <p><b>PUBLIC SERVICE BROADCASTING OR PSB is defined by Ofcom as programmes that have certain benefits, such as stimulating interest and knowledge, as well as being certain PROGRAMME TYPES as shown here</b></p> <p><b>MODERATOR HAND OUT STIMULUS SHOWING WHAT PSB IS AND WHAT IT ISN'T (Handout 2A)</b></p> | <p>Main aim is to explore: (a) <b>the relationship between TV, the internet and digital TV in providing PSB – do people want more or less PSB and on which platforms;</b> (b) the balance between <b>the amount of PSB content vs non PSB content</b></p> | <p>10 mins</p>       |

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| <ul style="list-style-type: none"> <li>- What types of programmes are particularly important <b>to you</b>? Why do you say this?</li> <li>- Which types of programmes are important <b>to society</b>? Why? [<i>PROBE FULLY - explore any differences in detail</i>]</li> <li>- Which programme types do we need more of/ Less of? Why?</li> <li>- And how far is it important that the programmes are UK made? For you? And for other people? And society? Why do you say this?</li> <li>- More specifically, for which programme types? Why do you say this?</li> <li>- How far is it important that PSB programmes are new? Free?</li> </ul> <p><b>Now, thinking about who provides Public Service Broadcasting. It IS DELIVERED BY BBC 1, BBC2 , UTV, CHANNEL 4, AND FIVE</b></p> <p>IT'S ALSO DELIVERED BY BBC'S DIGITAL CHANNELS, BBC3, BBC4, CBEEBIES AND CBBC, AS WELL AS SOME PROGRAMMES ON CHANNEL 4'S MORE 4</p> <p><i>Explain that there will be three scenarios to come, one with a middle amount of PSB, one with more, and one with less. Explain that PSB content will increase/decrease on TV channels as well as digital and websites. Imagine that this is a world where everyone has access to the free digital channels and many more people have access to the internet</i></p> <p><b>a. Scenario 1 (Handout 2B)</b></p> <ul style="list-style-type: none"> <li>- Give participants Scenario 1 and briefly explain that these are not scenarios for a particular day but the sort of programmes and other content you might expect to see on the main channels.</li> <li>.</li> </ul> <p><i>Moderator to focus on the main TV channels.</i></p> <ul style="list-style-type: none"> <li>- <b>What do you think about the amount of PSB shown here? PROBE FULLY. And what about the amount of non PSB? What do you think about the balance between the two?</b></li> <li>- And how do you think this compares to what is shown today? Why do you say this?</li> </ul> <p><i>Moderator to focus on PSB digital channels - refer to the box on the side of the bar chart.</i></p> <ul style="list-style-type: none"> <li>- How do you feel about the provision of PSB by the BBC and Channel 4 digital channels? <b>Is this important to you? Why (not)? What about other people in society? Why? [<i>PROBE FULLY - explore any differences</i>]</b></li> </ul> <p><b>Moderator to introduce the commercial digital channels using the handout (Handout 2C) (EXPLAIN, IF NEEDS BE THAT EVERYTHING LEFT OF THE LINE IS FREE, EVERYTHING TO THE RIGHT IS SUBSCRIPTION)</b></p> <p><i>These channels aren't regulated and can provide</i></p> | <p><b>overall</b>, and not by specific tv channels.</p> <p>Ensure this explanation of PSB is clear</p> <p><b>MODERATOR NOTE:<br/>DO NOT DWELL TOO MUCH ON SOAPS/SPORTS HERE OR ELSEWHERE DURING THE DAY; IT IS THE OTHER TYPES OF PROGRAMMES WE ARE INTERESTED IN</b></p> <p>General discussion about amount of PSB.</p> <p>PRESENT THIS AS A <u>SCENARIO</u> RATHER THAN A CURRENT DAY. REVEAL IT TO BE A CURRENT DAY WHEN THE COSTS ARE INTRODUCED AFTER LUNCH.</p> | <p>10 mins</p> |
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| <p><i>whatever kinds of programmes they like.</i></p> <ul style="list-style-type: none"> <li>– What do you think about the programmes that are on all these other commercial digital channels?</li> <li>– Do any of these channels or programmes on these channels have a social value in your view? Why do you say this? Do their programmes differ to the programmes on the main 5 channels? In what way? (probe on UK content, quality, repeats)</li> <li>– <b>Given there's all these digital commercial channels offering all this different types of programming, do you think it more or less important today that the main 5 channels provide programmes that are good for society? Why? Why not?</b></li> </ul> <p><i>Moderator to focus on internet provision by BBC and Channel 4 initially and then refer to other websites. Remember that PSB on the internet is mainly about in-depth website content, clips, sound files etc.</i></p> <ul style="list-style-type: none"> <li>– <b>To what extent is the provision of PSB on the BBC and Channel 4 websites important to you? Why do you say this? What about for other people? And the rest of society? [PROBE FULLY]</b></li> <li>– Are there any other websites you can think of that have PSB type content? <b>How about regional website?</b></li> </ul> <p><b>Moderator to introduce the handout with the websites as a prompt (Handout 2D)</b></p> <ul style="list-style-type: none"> <li>– Here are some other websites that you may think have a social value.</li> <li>– <b>Given that there are all these internet sites and many more, is it as important that the main channels show PSB? Why is this?</b></li> </ul> <p><b>MODERATOR TO EXPLAIN THAT NOW GOING TO WORK AS TWO GROUPS – ONE GROUP TO GO THROUGH THE LESS THAN SCENARIO (Handouts 2E and 2F) AND ONE TO GO THROUGH THE MORE THAN SCENARIO (Handouts 2G and 2H). ASK THEM TO WORK THROUGH THE QUESTIONS ON THE PROMPT CARDS AND TO REMIND THEM TO REFER BACK TO THE SCENARIO THEY HAVE JUST DISCUSSED WHEN FORMING THEIR OPINIONS BEFORE THEY PRESENT BACK TO THE GROUP</b></p> <p><b>ALLOW EACH GROUP ABOUT TEN MINUTES TO GO THROUGH THEIR SCENARIO.</b></p> <p><b>THE FOLLOWING PROMPTS CAN THEN BE USED TO MOVE ON THE DISCUSSION WHEN EACH GROUP PRESENTS BACK.</b></p> <p><b>b. Scenario 2 (Handouts 2E and 2F)</b></p> <ul style="list-style-type: none"> <li>- Give participants Scenario 2 and briefly explain that there is less PSB, which means</li> <li>- TV – fewer new programmes, more repeats, fewer programmes of UK origin</li> <li>- Internet – less investment</li> <li>- Digital channels – more repeats</li> </ul> | <p>Less than scenario: 2E and 2F</p> <p>More than scenario: 2G and 2H</p> <p>Aim is to discuss a situation where there is less PSB, and the consequences of less PSB on all three areas – Main TV Channels, internet and PSB Digital channels.</p> <p>Aim is to discuss a situation where there is more PSB, and the consequences of less PSB on all three areas – TV, internet and Digital.</p> | <p>10 mins</p> |
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| <ul style="list-style-type: none"> <li>- Ask participants to spend a couple of minutes reflecting on this and noting down their thoughts, bearing in mind society as a whole.</li> <li>- Looking at this scenario, <b>thinking about yourself and society as a whole</b>, how do you feel about ...</li> <li>- the amount of PSB? [<i>right amount/too much/too little?</i>]</li> <li>- <b>What about balance between PSB and non-PSB?</b></li> <li>- <b>If there were less UK PSB programmes?</b></li> <li>- <b>If there were more repeats of existing series?</b></li> <li>- <b>If there was less PSB content on the BBC too?</b></li> <li>- <b>More generally how do you feel about the changes between this scenario and the one you first saw? Which appeals most to you?</b></li> </ul> <p><b>And on the <u>PSB digital channels</u> – (refer to side bar on chart listing BBC and Channel 4 digital channels) how do you feel if ...</b></p> <ul style="list-style-type: none"> <li>• <b>there was less PSB content on the PSB digital channels?</b></li> <li>• <b>Do they need to show new programmes, or can they just show repeats from the main TV channels?</b></li> </ul> <p>ONLY ASK THIS PROMPT IF NEEDED</p> <ul style="list-style-type: none"> <li>• <b>Given there are these other commercial digital channels (refer to poster on wall) providing different types of programmes does it matter whether the main TV channels or PSB digital channels provide less PSB content?</b></li> </ul> <p><b><u>And on the PSB websites, how do you feel if there was less new PSB content on the PSB websites?</u></b></p> <ul style="list-style-type: none"> <li>- <b>Given there are lots of different websites providing different types of content, does it matter less whether the main TV channels or PSB digital channels provide less PSB content?</b></li> </ul> <p><b>c. Scenario 3 (Handouts 2G and 2H)</b></p> <ul style="list-style-type: none"> <li>- Give participants Scenario 3 and briefly explain that there is more PSB, which means <ul style="list-style-type: none"> <li>- TV – more new PSB programmes, less repeats, more programmes of UK origin; more across each of the genres/channels</li> <li>- Internet – more investment</li> <li>- BBC and Channel 4 digital channels – more new PSB programmes</li> </ul> </li> <li>- Ask participants to spend a couple of minutes reflecting on this and noting down their thoughts.</li> <li>- Looking at this scenario, <b>thinking about yourself and society as a whole</b>, how do you feel about ...</li> </ul> |  |  |
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| <ul style="list-style-type: none"> <li>- <b>the amount of PSB?</b> [<i>right amount/too much/too little?</i>]</li> <li>- <b>What about balance between PSB and non-PSB?</b></li> <li>- <b>If there were more UK PSB programmes? What would be the benefits?</b></li> <li>- <b>If there were more new PSB programmes? What would be the benefits?</b></li> <li>- <b>If there was more PSB content on the BBC too?</b></li> <li>- <b>More generally how do you feel about the changes between this scenario and the one you first saw?</b> Why do you say this? Which appeals most to you?</li> </ul> <p><i>PROBE AROUND:</i></p> <ul style="list-style-type: none"> <li>- And what are the disadvantages about this scenario? (e.g. <i>not enough choice in types of programmes? Not enough non PSB programmes</i>)</li> </ul> <p><b>And on the PSB digital channels</b> – (refer to side bar on chart listing BBC and Channel 4 digital channels) how do you feel if ...</p> <ul style="list-style-type: none"> <li>• <b>there was more PSB content on the PSB digital channels?</b></li> </ul> <p>MODERATOR – ONLY ASK THIS IF THE ISSUES HAVE NOT BEEN PROPERLY COVERED ALREADY</p> <ul style="list-style-type: none"> <li>- Given there are these other commercial digital channels (refer to poster on wall) providing different types of programmes is it important for the main tv channels to provide more PSB content?</li> </ul> <p><b><u>And on the PSB websites, how do you feel if there was less new PSB content on the PSB websites?</u></b></p> <ul style="list-style-type: none"> <li>- How far do you think this would matter to other people? And to society? Why is this?</li> </ul> <p>MODERATOR – ONLY ASK THIS IF THE ISSUES HAVE NOT BEEN PROPERLY COVERED ALREADY</p> <ul style="list-style-type: none"> <li>- Given there are these websites (refer to poster on wall) providing different types of content, is it important for the main TV channels to provide PSB websites or not?</li> </ul> <p><b>d. Scenario summary and preference</b></p> <p><b>Of the three scenarios you have just seen which appeals most? Why do you say this?</b><br/>What advantages does this scenario bring? To you? And other people? And to society?</p> <p><b>How do you feel about increasing/decreasing the PSB content across TV?</b><br/><b>And what about a decrease or increase on the internet?</b><br/><b>Or on the PSB digital channels?</b></p> <p>Should the broadcasters focus on the main TV channels</p> | <p>Aim is to compare the three scenarios and examine participant preferences</p> | <p>10 mins</p> |
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| only or also focus on their digital channels? On their websites?  |  |               |
| <b>LUNCH</b>  |  | 13:10 – 13:55 |
| <b>6. PLENARY SESSION 3: Voting and costs</b> <ul style="list-style-type: none"> <li>a. Welcome back from lunch</li> <li>b. Voting session</li> <li>c. initial thoughts – get moderators to present topline findings if needs be as a means of prompting discussion and debate as a whole group</li> <li>d. Ofcom presentation on costs</li> <li>e. General questions around information they have seen</li> </ul>  |  | 13:55 – 14:15 |
| <b>7. BREAK OUT GROUPS 4: Costing</b><br>Moderator to attach costs to the three scenarios: <ul style="list-style-type: none"> <li>• <b><u>Scenario 1 is the amount of PSB provided today. (Handout 2B)</u></b></li> <li>• <i>You heard earlier from Ofcom that in the future [insert regional TV channel], Channel 4 and Five may no longer be obliged to provide PSB programming and may replace some PSB programming with other types of programmes that attract larger audiences. So until now these channels have been providing programmes such as news about country/region, or current affairs programmes for example because they are obliged to.</i></li> </ul> <p><b>Do you think we as a society should invest in order to maintain PSB programming on ITV1, Channel 4, and Five? Why? Why not?</b></p> <ul style="list-style-type: none"> <li>• <i>How important is PSB programming on the BBC to you? To society? If we were to invest in the future in PSB, do you think we should spend it on the BBC to increase provision? Or on the other main TV channels? Why? Why not?</i></li> <li>• <i>If we were to invest in the future where do you think we should spend the money? On the main TV channels? On digital channels? On websites? Why?</i></li> <li>• <i>How much would you be prepared to pay for Scenario 1?</i></li> </ul> | PARK ALL QUESTIONS ABOUT HOW THIS INCREASE WILL BE PAID FOR – OR DIRECT TO OFCOM IF REALLY NEEDED.<br><br>REFER BACK TO PSB DEFINITION FOR CLARITY | 14.15 – 14.40 |



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| <ul style="list-style-type: none"> <li>How would you feel if Scenario 1 cost each household in UK <u>£165 per year</u>? (representing a mix of licence fee for BBC + additional payments for the other channels to maintain PSB provision on [insert regional TV channel], Channel 4, Five. <b>This is not an actual cost and is just hypothetical in order to discuss if you think we should as a society invest to maintain current provision. The costs in addition to the licence fee could be paid in a variety of ways, e.g. by government. So we are definitely not here today to talk about increasing the licence fee to pay for these other channels. The main thing is it would cost us more as a society than today). This is approx. £14 per month.</b></li> </ul> <p><b>Scenario 2: (Handout 2E) less PSB than scenario 1</b></p> <ul style="list-style-type: none"> <li>how would you feel if there were a drop in PSB provision in the future on [insert regional TV channel], Channel 4, and Five, as they may no longer be obliged to deliver PSB programmes. How would you feel if they reduced or even stopped the amount of PSB they provide today?</li> <li>(Note: very likely to keep PSB programming that attracts larger audiences , e.g. Soaps, UK dramas, etc)</li> <li>How much would you be prepared to pay for Scenario 2?</li> <li>This scenario would cost less than first one. <u>£140 per year.</u> (representing <u>licence fee for BBC</u> = spending about same as now, £11 per month)</li> <li>How would you feel if there were a reduction in the BBC? Would you be prepared to pay more to maintain provision on BBC?</li> </ul> <p><b>Scenario 3: (Handout 2G) more PSB provision than scenario 1</b></p> <ul style="list-style-type: none"> <li>Do you think we as a society should increase the amount we invest in PSB programming in order to get more PSB? This would mean</li> </ul> |  |  |
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| <p>increasing it even more than scenario 1 in order to get more PSB programming.</p> <ul style="list-style-type: none"> <li>• If yes, where would you like the money to be invested? (<b>which of the main TV channels? Then main TV channels vs digital channels vs websites?</b>)</li> <li>• How much would you be prepared to pay for scenario 3?</li> <li>• This would cost each household more than scenario 1 at approx. <u>£190 per year</u> (representing increase in funding from licence fee for BBC + additional costs for increased provision on [insert regional TV channel], Channel 4 and Five at approx. £17 per month</li> <li>• Now thinking about the costs for each scenario, where:</li> <li>• Scenario 1 would cost more to maintain current provision (hypothetically £165 per year)</li> <li>• Scenario 2 would cost the same as today, but there'll be a drop in provision (£140 per year)</li> <li>• Scenario 3 would mean greater investment to get an increase in PSB provision (£190 per year)</li> </ul> <p><b>SUMMARY</b><br/>Which scenario would you prefer? And which would be best for society as a whole? Why do you say this?</p> |                                      |                                     |
| <p><b>8. BREAK OUT GROUPS 5: “Imagine a world...”</b></p> <p><b>We’re still thinking about the future and a time when everyone has access to the free digital channels and more people have access to the internet at home.</b></p> <p><b>a. Imagine a world A. (Handout 3A)</b><br/>Moderator to produce scenario a and read:<br/>“I’d now like you to imagine a world where PSB is shown only by the BBC...”</p> <ul style="list-style-type: none"> <li>– <b>To what extent do you think it is important to have an alternative voice to the BBC?</b></li> <li>– What are the pros and cons of a sole provider compared to multiple providers? Why do you say this? [<i>PROBE FULLY</i>]</li> </ul> <p><i>If participants say multiple providers are important ask:</i></p> <ul style="list-style-type: none"> <li>– How many of the other main TV channels do you think should show PSB? Why do you say this?</li> <li>– <b>And for which types of programmes is it particularly important to have more than one</b></li> </ul>   | <p>Aim: Discussion of plurality.</p> | <p>14.40 – 15.20</p> <p>10 mins</p> |



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| <p><b>Why do you say this?</b></p> <ul style="list-style-type: none"> <li>– <i>How easy would it be to find PSB content, could these channels be given responsibility to produce PSB programming? Why? Why not?</i></li> <li>– <i>Access; differences for people throughout society; paying for content vs free content; role of main TV channels vs digital channels;</i></li> </ul> <p>MODERATOR: MAKE SURE THIS NEXT POINT IS COVERED IN DEPTH – WE REALLY NEED TO UNDERSTAND WHETHER WE SHOULD INSIST THAT THE COMMERCIAL CHANNELS PROVIDE PSB CONTENT I.E. ARE MADE TO DO SO AND GIVEN MONEY TO DO SO.</p> <ul style="list-style-type: none"> <li>– <b>What do you think about the idea that, in the future when everyone has digital TV, commercial digital channels should have a remit/obligation to produce PSB programming? Note –they would receive extra money to do so.</b></li> <li>– How does this clash with their commercial interests? Why?</li> <li>– How do you think the cost of this would compare with what we have just discussed?</li> </ul> <p><u>Scenario D: (Handout 3D)</u></p> <p>"I'd now like you to imagine a world where PSB is shown only by the BBC and on websites..."</p> <ul style="list-style-type: none"> <li>– To what extent does it matter if the only alternative voice to the BBC is delivered via the internet? Why do you say this? What about other people – do you think it would matter to them?</li> <li>– Does this matter for some programme types more than others? Are some programme types more suitable than others? Which ones? Why do you say this? <ul style="list-style-type: none"> <li>– <i>[PROBE SPECIFICALLY ON: news about region/country on [insert regional TV channel] website, UK news on all channels, serious factual, children's programmes]</i></li> </ul> </li> </ul> <p>MODERATOR – MAKE SURE THAT PARTICIPANTS UNDERSTAND THAT THIS NEXT POINT IS ABOUT REDEFINING CONTENT FOR THE WEBSITES AND NOT JUST DELIVERING PROGRAMMES BY STREAMING/DOWNLOADING OFF THE NET</p> <ul style="list-style-type: none"> <li>– <b>What types of content do you think could be delivered on websites instead of as programmes on TV? Why do you say this?</b></li> <li>– And which types of content could not be delivered via websites? Why do you say this? <i>[PROBE FOR: whether there are some programme types which have to be delivered via the main tv channels and why?]</i></li> <li>– <b><u>How easy would it be to find PSB content?</u></b></li> <li>– <b><u>How easy would it be to identify PSB content?</u></b></li> <li>– <b><u>How</u></b> do you think the cost of this would compare with what we have just discussed?</li> </ul> <p><b>c. Summary of key points</b></p> <p>- <b>So thinking about society as a whole, how important is it to have more than 1 broadcaster providing PSB content on the main TV channels?</b></p> | <p>SECONDARY IMPORTANCE AS WE ARE TALKING ABOUT THE DIGITAL COMMERCIAL CHANNELS OR FREEVIEW AS WELL AS THE COMMERCIAL WORLD</p> <p>MODERATOR NOTE:<br/>Stress the idea of obligation rather than current levels of provision</p> | <p>5 mins</p> |
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| <p><b>For which programme types in particular?</b></p> <p>As it is cheaper to provide programming on the digital channels and provide content on the internet, the relative costs for each of these scenarios would vary, The costings are:<br/> Option 1 = BBC only cheapest<br/> Option 2 = BBC and Channel 4 most expensive<br/> Option 3 = in the middle<br/> Option 4 = in the middle<br/> Given this, which scenario would you prefer, thinking about society as a whole and why?</p>   |   |  |
| <p><b>TEA / COFFEE BREAK</b></p>  |   | <p>15.20- 15.35</p>                                |
| <p><b>9. BREAK OUT GROUPS 7: Schedule exercise</b></p> <p><i>Moderator to explain:</i></p> <ul style="list-style-type: none"> <li>- <i>Finally, as we've discussed, in the future, it will cost more to produce the same amount of PSB that is today. [insert regional TV channel], Channel 4 and Five face commercial pressures. This is now all over to you and you're in charge!</i></li> </ul> <p><b>a. Exercise 1 (Handout 4A)</b></p> <ul style="list-style-type: none"> <li>- <i>Introduce scenario (MODERATOR TO SHOW PARTICIPANTS THE STIMULUS – provide one stimulus to each pair (<b>handout 4A</b>)) - represents the kind of programmes that are shown now.</i></li> <li>- <b><i>This isn't a schedule</i></b> and doesn't represent the order in which programmes are shown in a day. It's just a list of different types of programmes.</li> <li>- <i>The ones in bold represent some PSB programme types. <b>The programme titles such as Panorama are just examples</b></i></li> <li>- <i>Each of these PSB programme types has a number of points, ranging from three to five represented by the stars, for example news on [insert regional TV channel] has 3 stars or points</i></li> <li>- <i>I'd now like you, in pairs, to think about potential changes to this scenario.</i></li> <li>- <i>If we want our programmes to cost the same in the future as they do now, then we need to think about different ways in which they could be provided</i></li> <li>- <i>I'd now like you to re-arrange this scenario <b>so that we lose twenty points or stars off the total cost.</b></i></li> <li>- <i>To do this you can move any of the PSB programme types, into either the digital channels or the website box.</i></li> <li>- <i>When doing this, think about why you are moving certain programme type to the digital channels and or to the internet. (Please think about the programme types themselves and ignore the examples))</i></li> <li>- <b><i>When moving programmes to the internet, we are talking about changing them into indepth websites, we don't mean simply putting the programmes onto the internet to watch there.</i></b></li> <li>- <b><i>Think about society as a whole, not just your own personal preferences</i></b></li> <li>- <b><i>Imagine this is in the future when a lot of people will have access to the internet at home and everyone will have access to the free digital channels on freeview</i></b></li> </ul> | <p><b>Moderator note: UK soaps and sport are NOT part of this exercise – they are not under threat as they generally get large audiences so are commercially viable for the channels</b></p> <p>Moderator: KEEP IN MIND THE KEY AIMS – EXPLORING ISSUES AROUND SUBSTITUABILITY AND PLURALITY in relation to costs, AND PULL THESE OUT HERE.</p> <p>REMINDE PARTICIPANTS THAT WE ARE STILL IN A FUTURE WORLD WHERE EVERYONE HAS FREE DIGITAL CHANNELS AND MORE PEOPLE WILL HAVE THE INTERNET</p> | <p>15.35 – 16: 40</p> <p>5 mins</p> <p>15 mins</p> |

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| <p>- <i>After you've done this I will ask each pair to feedback to the group to explain what has been moved and why. I'll write some questions up here for you to have a think about and let the group know your thoughts. You've got about 10 minutes.</i></p> <p><i>Leave pairs for 10 minutes to do exercise</i></p> <p><i>Ask each pair to spend several minutes feeding back to the rest of the group:</i></p> <p>MODERATOR TO put PROMPTS on flip chart and ask people to refer to these when presenting to the group:</p> <ul style="list-style-type: none"> <li>• Why have you chosen this?</li> <li>• <b>Why do these types of programmes have to be shown on the main channels? How many of the main channels? Just one? More than one?</b></li> <li>• Who is this scenario good for? What are the advantages of it for society?</li> <li>• What are the disadvantages of it for society?</li> </ul> <p><b>MODERATOR TO PROBE PARTICIPANTS ON WHY THEY HAVE CHOSEN WHAT THEY HAVE AND, IN PARTICULAR, WHAT IS MOST IMPORTANT TO THEM and to society as a whole</b></p> <p><b>b. Specific programme types</b><br/>At end of this exercise ask whole group specifically on</p> <p><b>Looking specifically at news for people in country/region</b></p> <ul style="list-style-type: none"> <li>- <b>What difference would it make to you and to society if only one broadcaster provided news about country/region? What would you miss?</b></li> <li>- <b>What other methods are there for accessing news about country/region? (radio, websites, probe utv website)</b></li> <li>- <b>Are these methods better? Worse?</b></li> <li>- <b>What if <i>[insert regional TV channel]</i> stopped its TV news service but developed its <i>[insert regional TV channel]</i> news service on its website?</b></li> </ul> <p><b>Looking specifically at factual programmes</b>, which may not attract large audiences on the main TV channels, e.g. documentaries, history, science, nature, or arts programmes or current affairs and religious</p> <ul style="list-style-type: none"> <li>- Would it matter if the main channels didn't show as many serious factual programmes? for you? For society?</li> <li>- <b>Would it matter if all main tv channels replaced these types of programmes that are designed to cater for different audiences, with programmes that appeal to a lot of people?</b></li> <li>- <b>What is the role of the main tv channels in your view? To cater for different audiences or mass audiences?</b></li> <li>- <b>How about if you had to subscribe to specialist commercial digital channels to get these types of programmes?</b> <ol style="list-style-type: none"> <li>a. What about those people who don't want or can't afford to pay extra for</li> </ol> </li> </ul> |  | <p>5 mins</p> |
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| <p>these programmes?</p> <p>b. Would there be any differences in the type of programme provided? (quality, UK vs non UK? What about any risks (e.g. channels unregulated, may change their content)</p> <p><b>b. Exercise 2. (Handout 4B)</b></p> <p>Moderator to explain that, in the future, it will be cheapest to put PSB content on the internet, cheaper on the main digital channels and most expensive on the main TV channels.</p> <ul style="list-style-type: none"> <li>• Does this surprise you?</li> <li>• If you were going to decide which programme types need to be shown on the main TV channels, digital channels and websites in the future, based on everything we've talked about today, given the pressures the tv channels are under and that it is cheaper to provide content on websites or on digital channels, where would you put these programme types and why?</li> <li>• <u>Please just choose those programme types which you think are the most important/essential and delete those programme types you don't think are important for you or society as a whole</u></li> <li>• You can put them where you like but bear in mind it costs money</li> <li>• You can put them on more than 1 channel or platform if you think this is important</li> <li>• In 10 minutes I'll ask you to tell the group what you've done and why</li> </ul> <p><b>MODERATOR TO PROBE PARTICIPANTS ON WHY THEY HAVE CHOSEN WHAT THEY HAVE AND, IN PARTICULAR, WHAT IS MOST IMPORTANT TO THEM and to society as a whole</b></p> <p>c. Summarise – which programme types that you think it is essential that the main TV channels provide? Why?<br/>On how many of the main TV channels? (All? Just one? More than one?)<br/>Which programme types is it essential that the digital channels provide?<br/>And the websites?<br/>(MODERATOR WRITE ON FLIPCHART IS HELPFUL)</p> |  | <p>15 mins</p> <p>5 mins</p> |
| <p><b>11. PLENARY SESSION 4: Discussion and IML Voting</b></p> <ul style="list-style-type: none"> <li>- Group discussion – Moderators to present topline findings as a means of prompting debate e.g. what are the key messages from today? What types of PSB programmes are most important to you? And how should they be delivered?</li> <li>- IML Voting: Repeat some questions from earlier in the day</li> </ul>  |  | 16:40 – 16:55                |
| <p><b>Thanks and close.<br/>Thanks from Ofcom</b></p>  |  | 16:55- 17.00                 |



## A2. Discussion guide for the reconvened workshop

### J31644 – Ofcom PSB Review 2007

#### London reconvened workshop Discussion guide

| Description  | Comments   | Time             |
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| <b>ARRIVAL AND REGISTRATION</b>  |  | 9.30-10.00       |
| <b>1. PLENARY SESSION 1 - INTRODUCTION</b><br><br><b>a. Introduction by Chair and initial IML voting</b> <ul style="list-style-type: none"> <li>– Thank participants for coming back to participate again</li> <li>– Introduce Ipsos MORI moderators and note takers. Role of Ipsos MORI – research organisation, gather all opinions: all opinions valid, disagreements OK</li> <li>– Brief Introduction about Ofcom – mention that as they know, Ipsos MORI is carrying out this project on behalf of Ofcom, the UK communications industry regulator, who are carrying out a review of current Public Service Broadcasting provision and the future of Public Service Broadcasting and that Ofcom will provide a report to the government on this in March next year. So what we talk about today will have a real impact on the future of Public Service Broadcasting in UK.</li> <li>– Introduce the team from Ofcom. Mark to say thank you so much for coming and giving up your Saturday. Your views today will be vital in helping us devise our report for the government</li> <li>– Explain that purpose of the day is to explore in more depth your views on the future of Public Service Broadcasting, how important is it? How much PSB do we need in the future? Is Public Service Broadcasting really necessary? How much do we think should be spent on it?</li> <li>– They were asked to come back because they had interesting views and are now experts in Public Service Broadcasting – and we want to hear more from them, their own views and views thinking about society as a whole. Explain that participants are from all over the UK .</li> <li>– Participants will remember some of the stuff we will be covering from the previous session but the aim is to get greater clarity on these issues. We will recap old ground, but we really need your views – you may have thought more about it hopefully. Also there area number of you here from different regions and nations, so this should help with the debate round the nations</li> </ul> | <p>Introductory session- relaxes participants and outlines how the day will go.</p> <p>Helps to set expectations for the participants</p> <p>Important to emphasise the mix of individuals</p> | 10:00 –<br>10:30 |

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| <ul style="list-style-type: none"> <li>- We will be spending the day in this room as a group and in smaller discussion groups to hear your views.</li> <li>- There will be a coffee break in the morning, lunch and coffee break in afternoon. We will definitely finish at 4pm</li> <li>-</li> <li>- Confidentiality: reassure all responses will not be traced back to individuals. Explain that note taker will transcribe for quotes, no detailed attribution</li> <li>- Refer participants to their packs – these will contain an agenda along with a definition of PSB <b>(Handout 1) As before this definition consists of programme types and obligations on the channels</b></li> <li>- Recap on what PSB is (and isn't) and how it might change in the future. Present some initial quantitative findings. <b>(Presentation 1)</b> This consists of the personal and social top 5 programme types and the UK programme types only</li> <li>- Explain that throughout the day we are talking about the future – a future where everyone will have digital channels on Freeview and most people will have access to the internet and the population of UK will be different.</li> <li>- <b>b. IML initial vote: - Explain this is their chance to express their views in private. (Voting 1)</b></li> </ul> |   |                                     |
| <b>BREAK OUT SESSION No 1</b>   |   |                                     |
| <p><b>INTRODUCTIONS AND WARM-UP</b></p> <p>Name, Where they are from, what they do?</p> <ul style="list-style-type: none"> <li>- Briefly, what do you remember from the workshop you attended? Did any of your opinions on PSB change after the last workshop? [WRITE THINGS ON FLIPCHART]</li> <li>- Have you spoken to any of your friends/family about the workshops? What did you/they say?</li> <li>- Did anything we discussed make you do anything differently? What? How did this make you feel?</li> <li>- How have your views changed since the workshop? Have you seen anything in the media that relates to what we discussed? What was this? Where did you see it? How did this impact on your views?</li> <li>- <b>And how did you find the pre-task? How difficult was the pre-task for you to do? What did you miss from ITV/Channel 4/ Five?</b></li> <li>- <b>How did this make you feel? What impact did this have on you?</b></li> </ul> <p><b>Probe on programme types missed; whether programmes were PSB or not? How was it just watching channels other than ITV, Channel 4 and Five</b></p> <ul style="list-style-type: none"> <li>- Did you abandon the pre-task? At what point? Why</li> </ul>   | <p>Give participants a chance to say if their views have changed over time</p> <p>Explores how difficult participants found it to complete the pre-task</p> | <p>10:30 – 11:00</p> <p>30 mins</p> |

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| was this? Did you start up again? What were the programmes types you needed to watch? Were these not available on other channels?  |  |   |
| <p><b>Understanding society</b></p> <p>MODERATOR TO EXPLAIN THAT, IN THE PREVIOUS WORKSHOPS, WE SPOKE A LOT ABOUT SOCIETY AND HOW PSB CAN BE OF BENEFIT TO SOCIETY AS A WHOLE. WE NOW WANT TO UNDERSTAND A BIT MORE ABOUT WHAT YOU MEAN BY SOCIETY.</p> <ul style="list-style-type: none"> <li>– Firstly, when I say 'society' what do you think of? What words or phrases spring to mind?</li> <li>– Do you feel part of the community where you live? The country you are from (PROBE ON ENGLAND, SCOTLAND, WALES AND NORTHERN IRELAND). What about a part of the UK as a whole? Why do you say this? What is driving these differences?</li> <li>– Thinking about society a bit more, we would like you to make a collage as a group. On the table, there are a selection of pictures and words as well as materials to make the collage with.</li> <li>– I'd like to split you into two groups and for each group to make a collage which reflects the society in which we live. Remember, you all come from different parts of the UK so the collage will need to take account of this.</li> <li>– MODERATOR SPLIT GROUP INTO TWO AND ALLOW PARTICIPANTS 10 MINUTES TO COMPLETE THIS COLLAGE</li> <li>– Can you explain why you have chosen these images/words? What do they mean to you? How does this reflect society? [PROBE ON HOW PARTICIPANTS HAVE GROUPED SOCIETY... I.E. IS IT A WHOLE OR LOTS OF INDIVIDUAL COMPONENTS?]</li> <li>– <b>And bearing in mind how you think society looks now — what role can television play?</b></li> </ul> <p>What does it need to do to have a positive impact on this society? <b>Which groups in particular does it need to cater for? Why do you say this? And what about</b> the role of PSB for society? Who should PSB be for? PROBE SPECIFICALLY ON THE CHANNELS AND EXAMPLES / TYPES OF PROGRAMMES PARTICIPANTS SEE FALLING INTO THIS CATEGORY.</p> <ul style="list-style-type: none"> <li>• <b>In the future, should the main channels provide programmes with a mass appeal or should they provide programmes that appeal to different audiences?</b></li> </ul> <p><b>What about other media? What role do the digital channels need to play? Why do you say this? Which groups can they cater for that maybe the main five channels cannot?</b></p> | <p>Starts off the discussion with some word association to explore top of mind reactions to the concept of society</p> <p>Collage exercise will help participants define the concept of society – will also allow them to see the perspective of other participants from around the UK</p> <p>We will put up the collages around the room at the day progresses</p> <p>Looks at how society might have changed over time and gets them to start thinking about the future</p> <p>Really trying to get at what the implications for society are here.</p> | <p>11:00 –<br/>11:35<br/>5 mins</p> <p>10 mins</p> <p>5 mins</p> <p>15 mins</p> |

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| – And what about the Internet? What is its role in society? How might this change looking forward? And which groups in society can the internet best cater for? Who can't it? Why do you say this?   |  |   |
| <b>TEA AND COFFEE BREAK</b>  |  | 11:35 –<br>11:45                                      |
| <p align="center"><b>PLENARY SESSION</b></p> <p align="center"><b>PRESENTATION BY IPSOS MORI ON THE PRESSURES ON BROADCASTERS</b></p> <p align="center">THIS WILL PICK UP ON ISSUES RELATED TO DECLINE IN AUDIENCE SHARE, INCREASE COMPETITION, INCREASED VIEWING OF DIGITAL CHANNELS AND THE COMPETITION FROM OTHER ENTERTAINMENT ACTIVITIES SUCH AS THE INTERNET. ALSO DROPPING THE PSB REMIT FOR ITV, C4 AND FIVE .<br/><b>(PRESENTATION 2)</b></p> <p align="center"><b>Reversioned COST PRESENTATION (PRESENTATION 3) BY MARK and Q and A</b></p>   |  | 11:45 –<br>12:10                                      |
| <b>BREAK OUT SESSION</b>   |  |   |
| <p><b>PSB Costs in the future</b><br/>(MAKE HAVE TO HAND WHAT THE MAIN TV CHANNELS PROVIDE AND DEFINITION OF WHAT PSB IS)</p> <p>As you know, in the future ITV, Channel 4 and Five may no longer be obliged to provide PSB programming and may replace some PSB programming with other types of programmes that attract larger audiences. They may still show some PSB programming but there is no guarantee they will do so. Therefore they are very likely to keep PSB programming that attracts larger audiences , e.g. Soaps, UK dramas, etc, but may not do for programming that doesn't</p> <p><b>Should there be rules for ITV, Channel 4 and Five to provide PSB in the future? Even if it mean they are losing money? Is PSB programming on these channels important enough to have rules in place?</b></p> <p><b>Should we as a society invest in order to maintain PSB programming on ITV, Channel 4, and Five? Why? Why not?</b></p> <p><b>Would you be prepared to pay more? How about other people? Are there certain programme types that are more important than others to provide on ITV, Channel 4 and Five? Probe on programme types USE PROGRAMME TYPE STIMULUS MATERIAL</b></p> <p><b>Ofcom representative (and Chair in one session) to present the Future Options for PSB.</b> As a result of the workshops and thinking at Ofcom three possible options for the future have been worked up</p> <p>Any questions on what you have heard?</p> <p>Exercise: Moderator to Split the group into 3 and ask each group to discuss all of the following options.<br/><b>HANDOUT 2</b></p> <p>Option 1.</p> <p align="center">BBC to continue to provide the same level of PSB</p> | <p>This explores the issues of cost in far more detail than in the previous workshops</p> <p>May need to refer to handout 1 in this session.</p> <p><b>MODERATOR TO PROBE SPECIFICALLY ON ITV HERE</b></p> | <p>12:10-<br/>12:50</p> <p>20 mins</p> <p>20 mins</p> |

|  |   |                                    |
|--|---|------------------------------------|
| <p>ITV, Channel 4 and Five will no longer obliged to provide PSB and can show whatever programmes they choose</p> <p>Costs = the same as today</p> <p>PSB = BBC only, all other channels can show whatever they choose</p> <p>Option 2.</p> <p>BBC to continue to provide the same level of PSB</p> <p>Government to increase spend on PSB in order to enable ITV, Channel 4 and Five to continue to provide PSB</p> <p>Costs = increase in government spend vs. today</p> <p>PSB = same level as today on BBC, ITV1, Channel 4 and Five</p> <p>Option 3.</p> <p>BBC to receive less money from the government</p> <p>The government to redirect this money to ITV1, Channel 4 and Five to continue to provide PSB programmes</p> <p>Costs = the same as today</p> <p>PSB = less on BBC in exchange for maintaining PSB on ITV1, Channel 4 and Five</p> <p>Moderator to ask each group to feedback detailing their opinions on the:</p> <p style="padding-left: 40px;">Advantages</p> <p style="padding-left: 40px;">Disadvantages</p> <p>of each scenario. And what their preference is and why</p> |   |                                    |
| <b>BREAK OUT SESSION</b>   |   |                                    |
| <p><b>Programme Types</b></p> <p><b>READ OUT: Just before we break for lunch, there's a few things that came up in the previous workshops that we would like to explore in a bit more detail to allow us to really hear your views. As you know, you are from all the country, and we are especially interested in the issues around the portrayal of the nations and regions.</b></p> <p>We're now going on to talk a little bit about some programme types as these are findings from the workshops we've run that we want to know more about</p> <p><b>What about regional/national news? How do you feel you region is portrayed to the country? What about non news programmes in your region/country. Are these important? What about in</b></p>   | <p>This section explores some of the issues regarding programme types that have been raised in previous workshops</p> | <p>12:50-1:10pm</p> <p>20 mins</p> |

|  |   |  |
|--|---|--|
| <p><b>different areas of the UK? Is it more important to have this in some areas than others?</b></p> <p>What about children's? What if all children's programmes moved to digital channels? What difference would this make? (REMEMBER WE WILL ALL HAVE DIGITAL IN THE FUTURE) <b>Would there still need to be more than one provider of PSB for children's programmes</b> (e.g. CiTV and BBC)?</p>   |   |  |
| <p align="center"><b>PLENARY SESSION</b></p> <p align="center"><b>IML Voting on the future provision of PSB</b></p> <p align="center"><b>Summary of key findings so far from the moderators</b></p>  |   | 1:10pm – 1:20pm                                |
| <p align="center"><b>LUNCH BREAK</b></p>   |   | 1:20pm - 2:00pm                                |
| <p align="center"><b>BREAK OUT SESSION</b></p>   |   |  |
| <p><b>Digital Channels</b></p> <p><b>What are digital channels good for? What are the differences between the digital and the main TV channels? What are the drawbacks of the main TV channels compared to the digital channels?</b></p> <p><b>What is the role of the digital channels? Should they be there to provide original content?</b> Or does it matter that they show programming that has already been on other the main channels? PROBE FOR ADVANTAGES E.G. CAN CATCH UP AND DISADVANTAGES</p> <p><b>What are the differences between the digital channels provided by the main channels (e.g. BBC Three, More 4) and other ones?</b></p> <p><b>What sort of PSB type content is provided on the commercial digital channels? How does this differ from actual PSB content on the main channels? What are the benefits and drawbacks of both?</b></p> <p>If PSB content was provided on commercial digital channels in the future, would this be a good thing? What are the <b>differences in putting PSB on the main TV channels? (easy to find, identify, hard work done for you already, trust the content) Does it matter? How far will people in the future search out PSB content on the digital channels?</b></p> <p><b>The Internet</b><br/>Thinking about the provision of PSB content on the internet in more detail how, in practice, do you think this would work? PROBE FULLY AND EXPLORE THEIR SPONTANEOUS SUGGESTIONS.</p> <ul style="list-style-type: none"> <li>– MODERATOR TO EXPLAIN THAT, REALISTICALLY, THE PROVISION OF PSB CONTENT ONLINE WILL NOT BE ABOUT JUST SHOWING PROGRAMMES BUT INSTEAD WILL ENTAIL A DETAILED ONLINE RESOURCE – WITH CLIPS, STREAMING, INTERACTIVITY ETC.</li> <li>– <b>Do people think that there is enough PSB type content on the internet? Or do we need more?</b></li> </ul> <p><b>Is the stuff on the internet an added extra or is it</b></p> | <p>MODERATOR REMIND PARTICIPANTS: We're thinking about the future when everyone has access to the free digital channels and more people have access to the internet at home.</p> <p>Follows up on some of the issues explored previously in more depth. This examines the role of the digital channels</p> <p>If participants have trouble recalling digital commercial channels refer them to digital commercial channels handout.</p> <p>Again, this section explores in more detail how PSB might be provided over the internet</p> <p>Again looks at issues of navigation</p> | <p>2:00-2:30</p> <p>15 mins</p> <p>10 mins</p> |

|  |   |               |
|--|---|---------------|
| <p><b>a viable alternative to TV to reach different audiences? PROBE ON THE MERITS/DRAWBACKS OF FUNDING OF PSB ON INTERNET.</b></p> <p><b>How would you find PSB on the internet? How does this compare with the main channels? How about the digital channels?</b></p> <ul style="list-style-type: none"> <li>– What would be the disadvantages of this? PROBE ON: <ul style="list-style-type: none"> <li>○ <b>How they would find content</b></li> <li>○ <b>How they would find content that trust and feel is reliable</b></li> <li>○ <b>Passive versus active interest, broaden interests, vs deepen interests – different vs television</b></li> </ul> </li> <li>– How would PSB have to be provided online for it to be a viable option for you? PROBE FULLY. Why do you say this? What about for other people?</li> <li>– <b>So to sum up, what are the benefits of providing PSB in other ways than just the main five channels? PROBE FULLY AND EXPLORE ISSUES AROUND:</b> <ul style="list-style-type: none"> <li>○ New content</li> <li>○ <b>Reaching audiences that don't watch the main 5 channels</b></li> <li>○ More tailored content</li> <li>○ More choice</li> <li>○ Convenience – being able to access content when you want</li> </ul> </li> <li>– And what are the disadvantages of providing PSB in other ways than just the main five channels? PROBE FULLY AND EXPLORE ISSUES AROUND: <ul style="list-style-type: none"> <li>○ <b>Navigation (e.g. having to find content)</b></li> <li>○ <b>Credibility and trust</b></li> <li>○ Lack of new content – what if the market doesn't fill the gap?</li> </ul> </li> </ul> <p>So if you were looking at the priorities for main channels, should they focus on just the main channels, continue to invest in the digital channels, continue to invest in the website or all three?</p> | <p>Finishes session by really exploring how PSB will have to be provided online to make a real difference</p> | <p>5 mins</p> |
|--|---|---------------|



| <b>PLENARY SESSION</b><br><b>PSB SWOT ANALYSIS</b>  |  |
|---|--|
| <p><b>SWOT analysis of PSB</b></p> <p>CHAIR TO EXPLAIN THAT WE WILL NOW WORK AS ONE LARGE GROUP. ASK THE PARTICIPANTS TO SIT ON TABLES ACCORDING TO THE COLOUR OF THE STICKERS ON THEIR BADGES. EACH BREAK OUT GROUP WILL BE ASSIGNED AN AREA TO DISCUSS EITHER:</p> <ul style="list-style-type: none"> <li>○ STRENGTHS;</li> <li>○ WEAKNESSES;</li> <li>○ OPPORTUNITIES</li> <li>○ THREATS</li> </ul> <p>REGARDING PSB NOW AND IN THE FUTURE.</p> <p>MODERATORS WILL LEAD THE DISCUSSION WITH THEIR GROUPS AND WILL MAKE PEOPLE WRITE DOWN KEY THOUGHTS AND IDEAS ON BIG POST IT NOTES.</p> <p>KEY ISSUES TO DISCUSS REGARDING <b>STRENGTHS</b> OF PSB</p> <ul style="list-style-type: none"> <li>– What are the advantages of PSB?</li> <li>– What would society be like without PSB?</li> <li>– <b>Would it matter if PSB disappeared in ITV C4 and Five? Why?</b></li> <li>– What about if it also disappeared from the BBC?</li> <li>– What kind of impact can PSB have on people?</li> <li>– What values and characteristics does it live up to?</li> <li>– How is it different to other content provided on the television?</li> </ul> <p>KEY ISSUES TO DISCUSS REGARDING <b>WEAKNESSES</b> OF PSB</p> <ul style="list-style-type: none"> <li>– What are the disadvantages of PSB?</li> <li>– What would television be like with only PSB?</li> <li>– What kind of impact can programmes other than PSB have on people?</li> <li>– What if PSB programmes are not done well?</li> <li>– What if PSB programmes only appeal to small groups of people?</li> <li>–</li> </ul> <p>KEY ISSUES TO DISCUSS REGARDING <b>OPPORTUNITIES</b> OF PSB</p> <ul style="list-style-type: none"> <li>– <b>How might the provision of PSB change in the future?</b></li> <li>– Given the increase in digital channels and the internet, will this allow more outlets for PSB programming?</li> <li>– <b>Will different groups in society have their needs better met by PSB in the future?</b></li> <li>– <b>How might the digital channels and the internet change the way PSB is provided</b></li> <li>–</li> </ul> <p>KEY ISSUES TO DISCUSS REGARDING <b>THREATS</b> OF PSB</p> | <p>In this session the four groups will be working in the main room. One each on the Strengths, Weakness, Opportunities and Threats</p> <p>2:30-3:10</p> |

|   |  |  |
|---|--|--|
| <ul style="list-style-type: none"> <li>- <b>What about if ITV, Channel 4 and Five no longer provide PSB as they can't afford to do so any longer?</b></li> <li>- <b>What will the impact of the DSO be on the provision of PSB?</b></li> <li>- What about the increase in the numbers of channels and declining audiences?</li> <li>- What about changes in what people spend their time doing?</li> <li>- What about the increasing demands on leisure time?</li> </ul> <p>GET READY TO FEED BACK- TRY AND GET PARTICIPANTS TO FEED BACK IF POSSIBLE</p> |  |  |
|---|--|--|

|  |  |               |
|--|--|---------------|
| <b>TEA BREAK</b>   |  | 3.10-3.20     |
| <p>CHAIR: THIS IS YOUR FINAL CHANCE TO HAVE YOUR SAY ON THE FUTURE OF PSB...</p> <p>GENERAL DISCUSSION LED BY MODERATORS (OR PARTICIPANTS IF WE FEEL APPROPRIATE) OF THE <b>KEY THINGS</b> FOUND IN THEIR GROUPS. CHAIR TO WRITE UP AND REPORT BACK SOME OF THE KEY RECOMMENDATIONS FOR THE FUTURE.</p> <p>CHAIR TO OPEN UP TO GENERAL DISCUSSION ON THE FINDINGS</p> <p>WHAT ARE THE KEY ISSUES AMONGST THE ONES LISTED? WHAT DO OTHERS THINK OF THE STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS? ARE THESE RIGHT? ARE SOME MORE IMPORTANT THAN OTHERS? WHAT</p> |  | 3,20-3.45     |
| <b>PLENARY SESSION</b>   |  |               |
| <p><b>Moderator feedback</b></p> <p><b>IML Voting on the pros, cons, opportunities and threats to PSB</b></p> <p><b>- IML Voting: Repeat some questions from earlier in the day/ earlier workshops</b></p>   |  | 15.45 – 15:55 |
| <p><b>Thanks and close.</b></p> <p><b>Thanks from Ofcom.</b></p>   |  | 15:55-16.00   |

### A3. Ofcom's stimulus material



## Some benefits of Public Service Broadcasting

**Inform ourselves and others** and increase our understanding of the world through news, information and analysis of current events and ideas

**Stimulate our interest and knowledge of the arts, science, history and other topics** through programmes that are accessible and can encourage informal learning

**Reflect and strengthen our cultural identity** through original programming at UK, national and regional level, and by occasionally bringing audiences together for shared experiences

**Make us aware of different cultures and alternative viewpoints**, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere

## How Public Service Broadcasting can be delivered

**High quality** – well funded and well produced

**Original** – new UK content rather than repeats or acquisitions from overseas

**Innovative** – new ideas or re-inventing exciting approaches, rather than copying old ones

**Challenging** – making viewers think

**Engaging** – remaining accessible and attractive to viewers

**Widely available** – a large majority of people given the chance to watch it

## Public Service Broadcasting can be described as types of programmes ...

### PSB is:

News  
News about and for people in Northern Ireland  
(e.g. *UTV Live*, *BBC Newsline*)  
Other programmes about/for people in Northern Ireland  
(e.g. *Lesser Spotted Ulster*)  
Current Affairs (e.g. *Panorama*)  
Serious Factual (e.g. *Autumnwatch*)  
Arts (e.g. *The Culture Show*)  
Children's (e.g. *Tracy Beaker*; *Peppa Pig*)  
Religious  
Education (e.g. *BBC Learning Zone*)  
UK Comedy (e.g. *QI*; *Star Stories*)  
UK Drama (e.g. *Doc Martin*; *Doctor Who*)  
UK Soaps (some)  
Sports (some) (e.g. *Cup final*, *Wimbledon*)

### PSB is not:

Films  
Entertainment (e.g. *Strictly Come Dancing*, *X Factor*)  
Non-UK drama  
Non-UK Soaps  
Sport [most]  
Lifestyle factual (e.g. *Masterchef*, *Traffic cops*)

## What are the main TV channels asked to do?

BBC: distinctive programmes that inform, educate and entertain

### UTV

- News
- News about and for people in Northern Ireland
- Other programming about and for people in Northern Ireland
- High quality programmes from around the UK
- Current affairs

### Channel 4

- innovative, educational and distinctive programming

### Five

- focus on UK original programming

## Why are we here?

- We are currently undertaking a review of the future role of television in society in the UK
- We are really interested in:
  - what you think about current provision of television in the UK
  - how you see television in relation to other media, e.g. internet
  - how you see the future role of television in society in the UK

## Public Service Broadcasting on the main TV channels

### BBC

- distinctive programming that informs, educates and entertains

### UTV

- News
- News about and for people in Northern Ireland
- Other programming about and for people in Northern Ireland
- Current affairs
- Programmes from around the UK

### Channel 4

- Innovative, educational and distinctive programming

### Five

- Programming that takes place and is made in UK

## What are the challenges facing Public Service Broadcasting?

- The main TV broadcasters each face **financial pressures**:
  - money is limited
  - costs of making different types of programmes are very different
- **Audiences** for programmes are lower because of **competition** from digital channels, the internet, DVDs and videogames
  - For UTV, Channel 4 and Five, **smaller audiences = less income from advertising**
- Therefore, broadcasters are finding it harder to make new UK programming and certain types of programmes:
  - Some PSB programming is **expensive** to make (e.g. news about and for people in Northern Ireland, UK dramas, and documentaries)
  - Some PSB programming may not attract large audiences
- The broadcasters also face tricky choices in managing the **balance** between their:
  - **new services** on the internet
  - digital channels
  - main TV channels

3

## How is PSB funded – and how will it be in the future?

- **BBC** is funded by the **licence fee**:
  - level of the licence fee is decided by the government every ten years
  - government recently decided the BBC needed less money than it had asked for
  - BBC is now having to cut costs and decide priorities
- **UTV, Channel 4** and **Five** provide Public Service Broadcasting programmes in exchange for free airspace from the government to transmit their analogue channels
  - This means that indirectly, as **taxpayers**, we have always supported the provision of PSB programmes on these channels
- However, by 2012 when all TV channels will be digital, things will change ...
- **UTV, Channel 4** and **Five** will **no longer** be obliged to provide **PSB programmes**
  - In the face of competition, these channels may decide to stop showing those programmes, such as some PSB programmes, which don't attract large audiences
  - Therefore in the future it's likely that we will need to invest **more** money as a society to maintain **current** levels of PSB on these channels

4



## Over to you ...

We need to know what **you** think:

- 1 How important do you think Public Service Broadcasting is on **each** of the **main 5 channels**?
- 2 Do you think that we, as a society, should invest in the future in order to make sure we keep the level of Public Service Broadcasting we currently have?
- 3 Or would you be prepared to see a decrease in Public Service Broadcasting provision in the future?

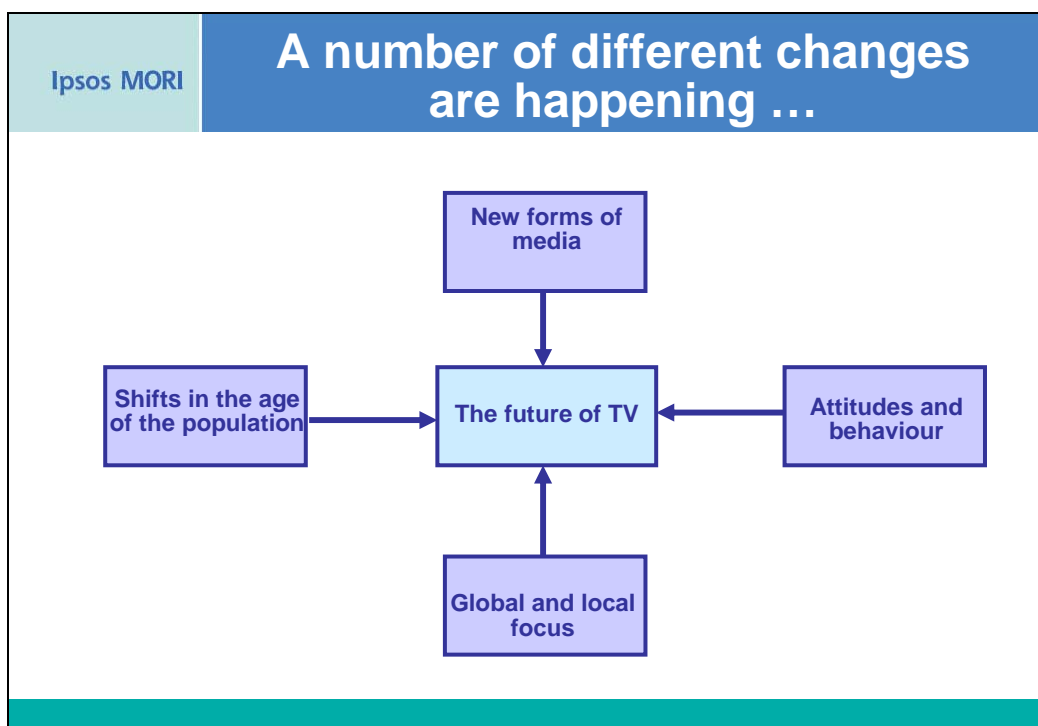
5

#### A4. Ipsos MORI's stimulus material

**Ipsos MORI**

## Future issues and challenges facing television in the UK



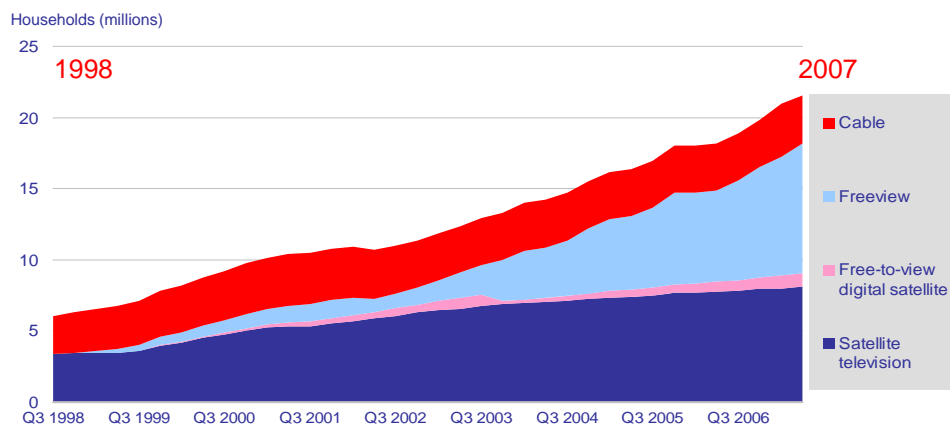


# 1 New forms of media



## Digital TV continues to grow rapidly

**85% of households in the UK now have multichannel TV**



Source: Ofcom, GfK, Sky, NTL



## Digital Switchover

- From 2008 to 2012, TV services in the UK will go completely digital
  - The UK's old television broadcast signal ('analogue') will be switched off and replaced with a digital signal
- Therefore everyone will have access to the free digital channels
- In 2012, Northern Ireland will switch over to digital TV



Ulster

Ipsos MORI

## The TV landscape - freeview



## The TV landscape - freeview



## The TV landscape – satellite/cable

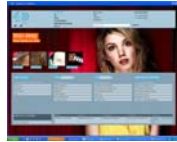


## Today's 'new' technologies



**Personal Video  
Recorders**

**Television over  
the internet**



**Television on  
your mobile**

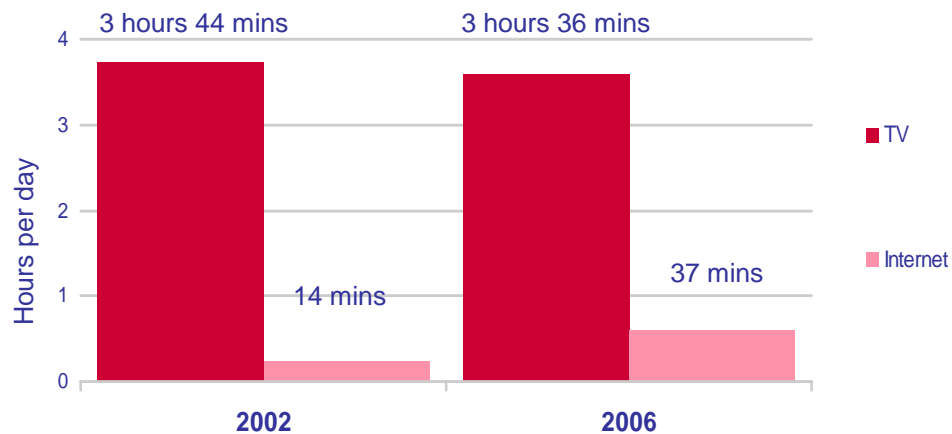


**Internet  
anywhere...**

**Social  
Networking**



## At home adults are spending more time online, but still most time spent watching television



## Younger generations

- **Children aged 5-15 years old spend more time watching tv (just over 2 hours per day) compared to dvds/videos, online or the radio**
  - When watching television they spend 54% of their time watching channels other than the main 5 channels
  
- **16 to 25 year olds spend more time online than watching television**
  - 3 hours 20 mins per day online (at home and at work) vs 2.5 hours watching tv
  - When watching television they spend 55% of their time watching channels other than the main 5 channels

## Much is changing, and will continue to do so

- Half of the UK population has broadband internet at home
  
- There is increasing use of the internet in various ways:
  - 42% of UK adults used social networking websites in 2006
  - 16-34s in UK have on average 6 friends they've never met



## 2 Shifts in the age - and income - of the population



### Our population ages ...

- Over 40% of the UK population will be over 45 by 2011
  - (And they want to remain young)
- There are also changes to the amount of haves and have nots:
  - 80% of wealth in 1% of population
  - Greatest polarisation of wealth since Victorian times

### 3 Global and local focus



- Geographical boundaries become blurred and people want to know more about the world
  - Does this mean less or more need to know about local, regional, national issues?
- Greater access to different information and entertainment
  - E.g. the import of Bollywood films to the UK
  - Content provided in different languages to meet the needs of an increasingly multicultural society
  - Increasing amounts of US channels and US TV shows

## 4 Attitudes and behaviour



### Changing public attitudes

Increasing distrust of authority...



Choices everywhere...



Time pressure and stress...



Work-life balance...?



We are more demanding and have rising expectations...



### What do these changes mean...?

- For broadcasters?
- For the audience?
- For you?

**OVER TO YOU!**

## Workshop handouts



# Descriptions of TV programmes

- News programmes and factual programmes that explain complicated issues clearly
- News programmes that are trustworthy
- Programmes that help me understand what's going on in the world today
- Interesting programmes about history, science or the arts
- As a result of watching these programmes, I've become more interested in particular subjects
- Big national events, like sports, music events or major news stories
- Programmes that show people from different parts of the UK
- Programmes that take place in the UK
- Soaps or dramas that take place in the UK
- Programmes that portray Northern Ireland well to the rest of the UK
- Programmes showing different kinds of cultures and opinions within the UK
- A wide range of high-quality and UK-made programmes for children
- News programmes about and for people in Northern Ireland that provide a wide range of good quality news
- A range of good quality programmes about and for people in Northern Ireland
- Programmes ...
  - Which are well-made, high quality
  - With new ideas and different approaches
  - That make me stop and think
  - I want to watch
  - That reflect the interests and concerns of people like me

## Handout 1A

# Different types of TV programmes

- **News**
- **News about and for people in Northern Ireland** (e.g. *UTV Live*, *BBC Newsline*)
- **Other programmes about/for people in Northern Ireland** (e.g. *Lesser spotted Ulster*, *Give my head peace*)
- **Current Affairs** (e.g. *Panorama*)
- **Entertainment** (e.g. *Strictly Come Dancing*, *X Factor*)
- **Arts** (e.g. *The Culture Show*)
- **UK Soaps** (e.g. *Coronation Street*)
- **Non-UK Soaps** (e.g. *Home and Away*)
- **UK Drama** (e.g. *Doc Martin*; *Doctor Who*, *Bleak House*)
- **Non-UK Drama**
- **Serious Factual** - history, science, nature programmes (e.g. *The Blue Planet*, *Autumnwatch*)
- **Lifestyle factual** (e.g. *Masterchef*, *Traffic cops*)
- **Children's** (e.g. *Tracy Beaker*; *Peppa Pig*)
- **Religious**
- **Education** (e.g. *BBC Learning Zone*)
- **UK Comedy** (e.g. *QI*; *Star Stories*)
- **Non-UK comedy**
- **Films**
- **Sport**

## Handout 1B

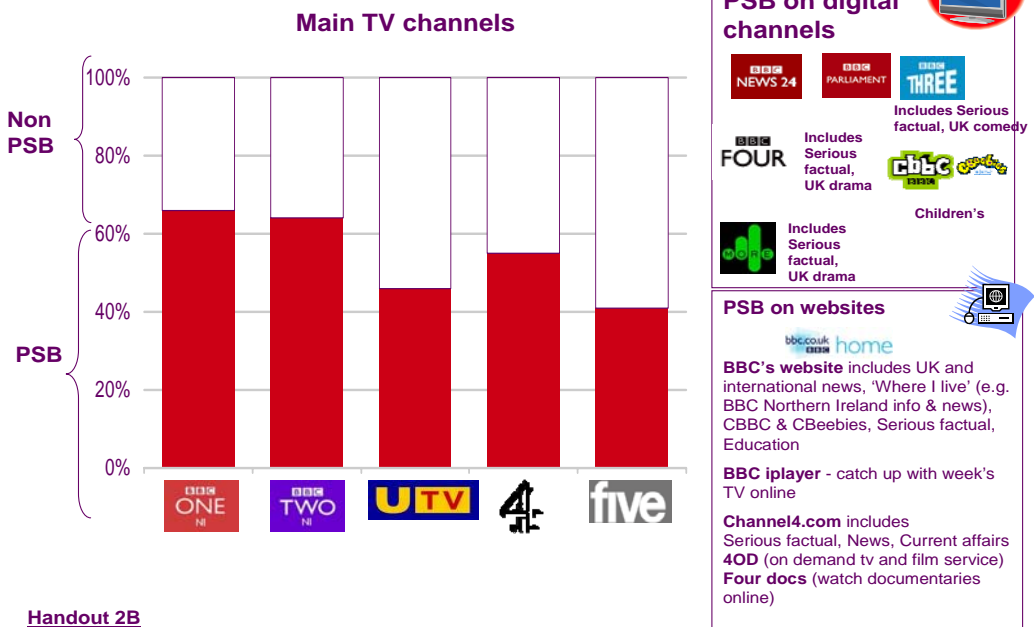
**Public Service Broadcasting is ...**

|  |  |                   |
|--|--|-------------------|
| News   | (e.g. on <i>BBC One Northern Ireland</i> , <i>ITV evening news</i> ) |                   |
| News about and made for people in Northern Ireland             | (e.g. <i>UTV Live at 6</i> , <i>BBC Newsline</i> )                   | <b>Handout 2A</b> |
| Other programmes about and made for people in Northern Ireland | (e.g. <i>Lesser spotted Ulster</i> , <i>Give my head peace</i> )     |                   |
| Current Affairs  | (e.g. <i>Panorama</i> )  |                   |
| Serious Factual - history, nature, science                     |  |                   |
| Arts   | (e.g. <i>The Culture Show</i> )                                      |                   |
| Children's   | (e.g. <i>Tracy Beaker</i> ; <i>Peppa Pig</i> )                       |                   |
| Religious  |  |                   |
| Education  | (e.g. <i>BBC Learning Zone</i> )                                     |                   |
| UK Comedy  | (e.g. <i>QI</i> ; <i>Star Stories</i> )                              |                   |
| UK Drama   | (e.g. <i>Doc Martin</i> ; <i>Doctor Who</i> ; <i>Bleak House</i> )   |                   |
| UK Soaps (some)  |  |                   |
| Sports (some)  | (e.g. Cup final, Wimbledon)  |                   |

**Public Service Broadcasting is not ...**

|                   |  |
|-------------------|--|
| Films             |  |
| Entertainment     | (e.g. <i>X Factor</i> , <i>Strictly Come Dancing</i> ) |
| Non-UK drama      |  |
| Sport (most)      |  |
| Non-UK Soaps      |  |
| Lifestyle Factual | (e.g. <i>Masterchef</i> , <i>Traffic Cops</i> )        |

**Scenario 1**



## Examples of digital commercial channels

Handout 2C



## Examples of websites

Handout 2D

WIKIPEDIA

*Encyclopaedia*



*Natural History Museum online resource*



*Search engine*



[www.newsletter.co.uk](http://www.newsletter.co.uk) for news and information online

Tate Online

*Tate gallery online resource*



[www.u.tv](http://www.u.tv)

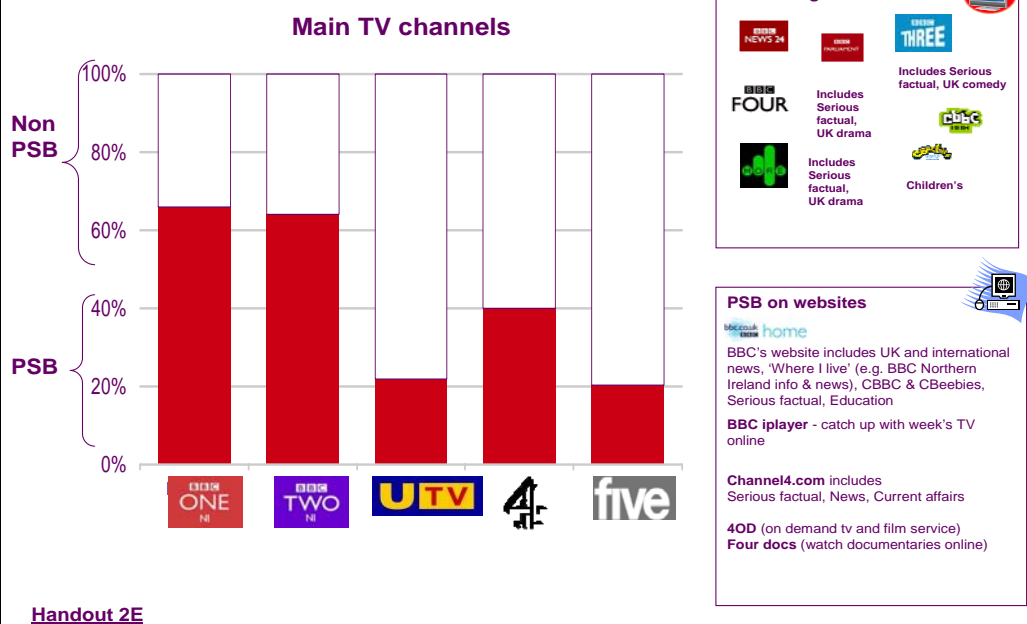
*UTV's website, including news and information online*



HISTORY.COM



## Scenario 2



## Handout 2F

This change would also mean less UK PSB programming e.g. less new UK dramas, UK comedy series, etc. Instead, there might be more light entertainment (e.g. X factor, Strictly Come Dancing) and programming from overseas (e.g. USA)

### So, how do you feel about...

(thinking about yourself and society overall)

#### Overall

- The amount of PSB programming?
- The balance between PSB and non-PSB programming?
- The changes between this scenario and the one you first saw?
- If there were less UK PSB programmes?
- If there were more repeats of existing series?
- If there was less PSB content on the BBC too?

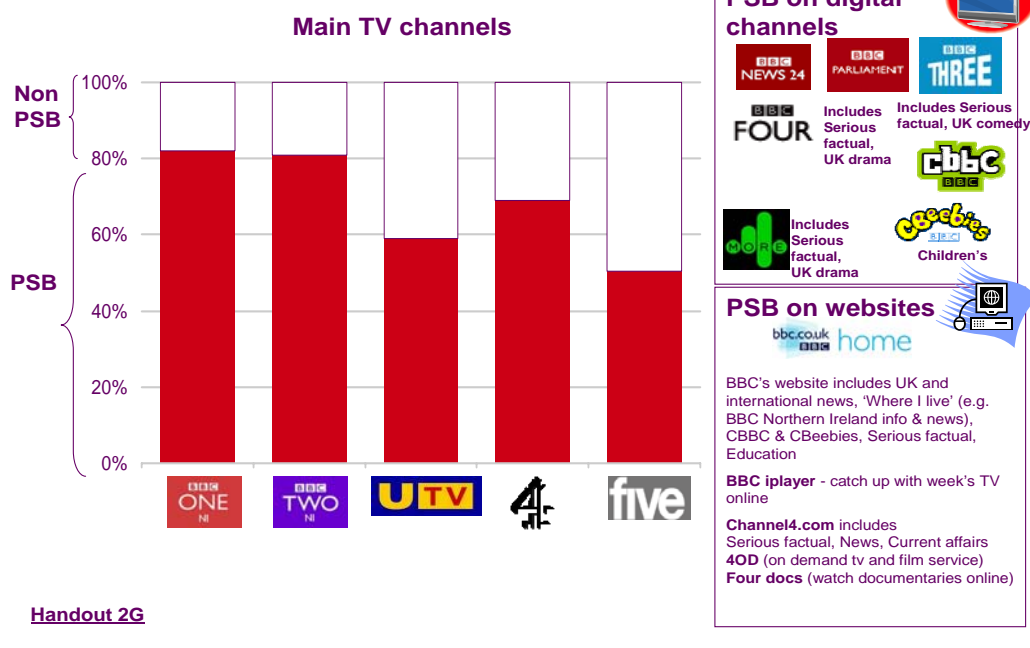
#### PSB digital channels

- if there was less PSB content on the PSB digital channels?

#### PSB websites

- If there was less new PSB content on the PSB websites?

### Scenario 3



### Handout 2H

This change would mean more UK PSB programming e.g. more new UK dramas, UK comedy series, etc. Instead, there might be less light entertainment (X factor, Strictly Come Dancing etc) and programming from overseas (e.g. USA)

**So, how do you feel about...**  
(thinking about yourself and society overall)

#### Overall

- The amount of PSB programming?
- The balance between PSB and non-PSB programming?
- The changes between this scenario and the one you first saw?
- More UK PSB programming? (Advantages? Disadvantages?)

#### PSB digital channels

- An increase in PSB content on the PSB digital channels?
- Given there are commercial digital channels providing different programmes, is it still important for the main TV channels to provide more PSB content?

#### PSB websites

- If there was more new PSB content on the PSB websites?

*Scenario 1 is the amount of PSB that is provided today, but it would cost more in the future to provide the same amount of programming. This scenario would cost approximately £165 per household in the future.*

*Scenario 2 is £140- less PSB than today. This would cost approximately the same as the amount paid you pay per household today.*

*Scenario 3 is £190 - more PSB than today. This would cost each household in the UK more than the amount paid today.*

How do you feel about each of the scenarios now in light of the costs to you?  
Why do you say this?

## Imagine a world where...

*The BBC is the **only** provider of Public Service Broadcasting content. This is provided through its main channels, its digital channels and its website.*

Scenario A

**Handout 3A**

## Imagine a world where...

Handout 3B

*The BBC and Channel 4 are the **only** providers of Public Service Broadcasting content. This is provided through their main channels, digital channels and websites.*

*How do the BBC and Channel 4 differ?*

*Is it enough to show PSB on just the BBC and Channel 4?  
For which programme types, if any?*

*Is it important to provide PSB on the other channels? For  
which programme types, if any?*

*What are the pros and cons of having more than 1 provider  
of PSB (e.g. competition)?*

Scenario B

## Imagine a world where...

Handout 3C

*The BBC is the only provider of PSB content on the main TV channels. However, **all** digital channels (including the commercial ones, e.g. Discovery Channel) also provide some Public Service Broadcasting programmes.*

*How would you feel if the commercial digital channels were obliged to provide some PSB programmes on their channels?*

*What would be the pros and cons of this? For you? For society?*

Scenario C

# Imagine a world where...

*The BBC is the only provider of Public Service Broadcasting content on the main TV channels. However, PSB is also provided on websites by a range of providers.*

*What types of PSB content can be delivered by websites? And what can't, in your view?*

*Would it matter if the only alternative to PSB on the BBC was found on websites?*

*What would be the pros and cons of websites compared to television programmes? For you? For society?*

Scenario D

| BBC ONE<br>NI   |  | BBC TWO<br>NI                           |  | UTV  |          | 4  |  | five   |  |
|---|--|---|--|--|----------|--|--|--|--|
| News ***  |  | Films                                   |  | Non UK Drama   |          | News ***                                   |  | US drama   |  |
| News about/for people in Northern Ireland<br>eg BBC Newsline *****          |  | UK Comedy ****<br>eg Peter Serafinowicz |  | News about/for people in Northern Ireland<br>eg UTV Live *****                   |          | Current Affairs ***<br>eg Dispatches       |  | Children's ***<br>eg Milkshake                         |  |
| Current Affairs ***<br>eg Panorama  |  | Education **<br>eg Learning Zone        |  | UK Drama *****<br>eg Doc Martin, Midsommer murders                               |          | UK Comedy ***<br>eg Peep Show              |  | Serious Factual ***<br>eg Nick Baker's Weird Creatures |  |
| Programmes about/for people in Northern Ireland<br>eg Give My Head Peace ** |  | Religious ***                           |  | Current Affairs ***<br>eg Tonight With Trevor Macdonald                          |          | UK Drama *****<br>eg The Deal              |  | Current Affairs ***<br>eg The Wright Stuff             |  |
| Children's ***<br>eg Tracy Beaker   |  | Serious Factual ***<br>eg Ray Mears     |  | Programmes about/for people in Northern Ireland<br>e.g. Lesser Spotted Ulster ** |          | Serious Factual ***<br>eg Unreported World |  | News ***   |  |
| Serious Factual ***<br>eg The Blue Planet, Autumnwatch                      |  | Children's ***                          |  | News ***   |          | Education **<br>eg C4 Schools              |  | US films   |  |
| UK Drama *****<br>e.g. Spooks, Bleak House                                  |  | Sport                                   |  | UK Soaps, eg Coronation St   |          | Films                                      |  | Soaps, eg Home and Away                                |  |
| UK Soaps, eg East Enders  |  |   |  | Films  |          | Entertainment, e.g. Big Brother            |  |  |  |
| Films   |  |   |  | Entertainment, eg. X Factor  |          | Lifestyle, eg Location...                  |  |  |  |
| Sport   |  |   |  |  |          | UK Soaps eg Hollyoaks                      |  |  |  |
| Lifestyle, Light Entertainment  |  |   |  |  |          |  |  |  |  |
| Digital channels  |  |   |  |  | Websites |  |  |  |  |
|   |  |   |  |  |          |  |  |  |  |

|  |   |
|--|---|
| <div data-bbox="472 246 692 280" data-label="Section-Header"> <h3>Main TV channels</h3> </div> <div data-bbox="359 297 805 347" data-label="Text"> <p><i>(please say how many of the main TV channels the programme type needs to be on, e.g. 1, more than 1)</i></p> </div> | <div data-bbox="904 201 970 228" data-label="Section-Header"> <h4>News</h4> </div> <div data-bbox="904 232 1251 284" data-label="Text"> <p><b>News about/for people in Northern Ireland</b></p> </div> <div data-bbox="904 291 1216 365" data-label="Text"> <p><b>Other programmes about/for people in Northern Ireland (e.g. <i>Lesser Spotted Ulster</i>)</b></p> </div> <div data-bbox="904 367 1061 396" data-label="Section-Header"> <h4>Current Affairs</h4> </div> <div data-bbox="904 400 1214 454" data-label="Text"> <p><b>Serious Factual</b> (<i>nature, history, arts, science programmes</i>)</p> </div> <div data-bbox="904 456 1018 486" data-label="Section-Header"> <h4>Children's</h4> </div> <div data-bbox="904 490 1010 519" data-label="Section-Header"> <h4>Religious</h4> </div> <div data-bbox="904 521 1016 553" data-label="Section-Header"> <h4>Education</h4> </div> <div data-bbox="904 555 1032 586" data-label="Section-Header"> <h4>UK Comedy</h4> </div> <div data-bbox="904 591 1016 620" data-label="Section-Header"> <h4>UK Drama</h4> </div> |
| <div data-bbox="440 638 639 676" data-label="Section-Header"> <h3>Digital channels</h3> </div>   | <div data-bbox="970 631 1093 665" data-label="Section-Header"> <h3>Websites</h3> </div>   |

## A5. Topline results from the regional/national workshops

### OFCOM Workshops Final Topline Results December 2007

- Results are based on responses given by 186 participants attending six deliberative workshops across the UK (Edinburgh, Swansea, London, Birmingham, Belfast and Durham) during October and November 2007.
- Treat these results with caution. Results are based on electronic voting during qualitative deliberative events; rigorous quantitative sampling procedures were not undertaken
- Data are unweighted
- Where figures do not add up to 100, this is due to computer rounding.

#### Q1 How much do you agree or disagree with the following statement? *Please one box only*

**“As well as entertaining and informing people, TV has an important role to play for the good of society as a whole.”**

*Base: All respondents from 6 workshops*

|                                  | Before | After |
|----------------------------------|--------|-------|
|                                  | %      | %     |
| Agree strongly.....              | 19     | 50    |
| Agree .....                      | 47     | 42    |
| Neither agree nor disagree ..... | 20     | 3     |
| Disagree .....                   | 10     | 4     |
| Disagree strongly .....          | 3      | 1     |
| Don't know .....                 | 2      | 1     |

#### Q2 How much do you agree or disagree with the following statement? *Please one box only*

**“As well as entertaining and informing people, the Internet has an important role to play for the good of society as a whole.”**

*Base: All respondents from 6 workshops*

|                                  | Before | After |
|----------------------------------|--------|-------|
|                                  | %      | %     |
| Agree strongly.....              | 22     | 27    |
| Agree .....                      | 41     | 52    |
| Neither agree nor disagree ..... | 20     | 15    |
| Disagree .....                   | 13     | 4     |
| Disagree strongly .....          | 2      | 1     |
| Don't know .....                 | 2      | 2     |



Q3 **How much do you agree or disagree with the following statement?**  
Please one box only

**“It is important for news to be shown on all of the main channels.”**

Base: All respondents from 6 workshops

|                                  | Before | After |
|----------------------------------|--------|-------|
|                                  | %      | %     |
| Agree strongly.....              | 46     | 25    |
| Agree .....                      | 28     | 30    |
| Neither agree nor disagree ..... | 10     | 13    |
| Disagree .....                   | 10     | 23    |
| Disagree strongly .....          | 6      | 8     |
| Don't know .....                 | 0      | 1     |

Q4 **How much do you agree or disagree with the following statement?**  
Please one box only

**“As well as entertaining and informing people, TV has an important role to play for the good of society as a whole.”**

Base: All respondents from 6 workshops

|                                  | Before | After |
|----------------------------------|--------|-------|
|                                  | %      | %     |
| Agree strongly.....              | 19     | 50    |
| Agree .....                      | 47     | 42    |
| Neither agree nor disagree ..... | 20     | 3     |
| Disagree .....                   | 10     | 4     |
| Disagree strongly .....          | 2      | 1     |
| Don't know .....                 | 2      | 2     |

Q5 **How much do you agree or disagree with the following statement?**  
Please one box only

**“As well as entertaining and informing people, the Internet has an important role to play for the good of society as a whole.”**

Base: All respondents from 6 workshops

|                                  | Before | After |
|----------------------------------|--------|-------|
|                                  | %      | %     |
| Agree strongly.....              | 22     | 27    |
| Agree .....                      | 41     | 52    |
| Neither agree nor disagree ..... | 20     | 15    |
| Disagree .....                   | 13     | 4     |
| Disagree strongly .....          | 2      | 1     |
| Don't know .....                 | 2      | 2     |

Q6 **How much do you agree or disagree with the following statement?**  
*Please one box only*

**“It is important for the main channels to show programmes that reflect life in the UK.”**

*Base: All respondents from 6 workshops*

|                                  | Before | After |
|----------------------------------|--------|-------|
|                                  | %      | %     |
| Agree strongly.....              | 46     | 50    |
| Agree .....                      | 41     | 42    |
| Neither agree nor disagree ..... | 9      | 4     |
| Disagree .....                   | 4      | 2     |
| Disagree strongly .....          | 1      | 1     |
| Don't know .....                 | 0      | 2     |

Q7 **How much do you agree or disagree with the following statement?**  
*Please one box only*

**“It is important for ITV as well as the BBC to show programmes about and for people in [my local area].”**

*Base: All respondents from 6 workshops*

|                                  | Before | After |
|----------------------------------|--------|-------|
|                                  | %      | %     |
| Agree strongly.....              | 56     | 52    |
| Agree .....                      | 33     | 37    |
| Neither agree nor disagree ..... | 5      | 7     |
| Disagree .....                   | 6      | 1     |
| Disagree strongly .....          | 1      | 3     |
| Don't know .....                 | 1      | 1     |

Q8 **How much do you agree or disagree with the following statement?**  
*Please one box only*

**“Serious factual programmes need to be shown on all of the main TV channels.”**

*Base: All respondents from 6 workshops*

|                                  |    |
|----------------------------------|----|
|                                  | %  |
| Agree strongly .....             | 22 |
| Agree.....                       | 38 |
| Neither agree nor disagree ..... | 20 |
| Disagree.....                    | 13 |
| Disagree strongly .....          | 6  |
| Don't know .....                 | 1  |

Q9 **How much do you agree or disagree with the following statement?**  
*Please one box only*

**“Childrens’ programmes need to be shown on all of the main TV channels.”**

*Base: All respondents from 6 workshops*

|                                  | %  |
|----------------------------------|----|
| Agree strongly .....             | 22 |
| Agree.....                       | 26 |
| Neither agree nor disagree ..... | 14 |
| Disagree.....                    | 28 |
| Disagree strongly .....          | 7  |
| Don't know .....                 | 1  |

Q10 **How much do you agree or disagree with the following statement?**  
*Please one box only*

**“News programmes about and for people in [my local area] need to be shown on the main channels.”**

*Base: All respondents from 6 workshops*

|                                  | %  |
|----------------------------------|----|
| Agree strongly.....              | 35 |
| Agree .....                      | 33 |
| Neither agree nor disagree ..... | 8  |
| Disagree .....                   | 17 |
| Disagree strongly .....          | 6  |
| Don't know .....                 | 1  |

Q11 **How much do you agree or disagree with the following statement?**  
*Please one box only*

**“Channel 4 does a good job of catering for audiences that other channels don't cater for.”**

*Base: All respondents from 6 workshops*

|                                  | Before | After |
|----------------------------------|--------|-------|
|                                  | %      | %     |
| Agree strongly.....              | 6      | 23    |
| Agree .....                      | 50     | 44    |
| Neither agree nor disagree ..... | 25     | 18    |
| Disagree .....                   | 7      | 9     |
| Disagree strongly .....          | 5      | 1     |
| Don't know .....                 | 9      | 5     |

**Q12 Please choose from one of the following options?**

*Please one box only*

*Base: All respondents from 6 workshops*

|  | %  |
|--|----|
| The main 5 broadcasters should develop their digital channels and online services..... | 44 |
| The main 5 broadcasters should focus on their main TV channels .....                   | 56 |

---

**Q13 Please choose from one of the following options?**

*Please one box only*

*Base: All respondents from 6 workshops*

|   | %  |
|---|----|
| At least one of the main TV channels, in addition to the BBC should show public service broadcasting programmes .....                     | 72 |
| As long as the BBC shows public service broadcasting programmes, the other main TV channels should be allowed to show what they like..... | 28 |

---

**Q14 Please choose from one of the following options?**

*Please one box only*

*Base: All respondents from 6 workshops*

|   | %  |
|---|----|
| News programmes need to be shown on the main TV channels .....  | 90 |
| News programmes don't need to be shown on the main TV channels, so long as they are shown on the digital channels ..... | 9  |
| News programmes don't need to be shown on the main TV channels, so long as this type of content is on the Internet..... | 2  |

---

**Q15 Please choose from one of the following options?**

*Please one box only*

*Base: All respondents from 6 workshops*

|  | %  |
|--|----|
| News programmes about and for people in [my area] need to be shown on the main TV channels.....  | 83 |
| News programmes about and for people in [my area] don't need to be shown on the main TV channels, so long as they are shown on the digital channels .....              | 16 |
| News programmes about and for people in [my area] don't need to be shown on the main TV channels, so long as people can get this type of content on the Internet ..... | 1  |

---

**Q16 Please choose from one of the following options?**

*Please one box only*

*Base: All respondents from 6 workshops*

|  | %  |
|--|----|
| Serious factual programmes need to be shown on the main TV channels .....  | 76 |
| Serious factual programmes don't need to be shown on the main TV channels, so long as people can get them on the digital channels..... | 23 |
| Serious factual programmes don't need to be shown on the main TV channels, so long as this type of content is on the Internet.....     | 2  |

---

**Q17 Please choose from one of the following options?**

*Please one box only*

*Base: All respondents from 6 workshops*

|  | %  |
|--|----|
| Childrens' programmes need to be shown on the main TV channels .....   | 51 |
| Childrens programmes don't need to be shown on the main TV channels, so long as children can get them on the digital channels..... | 48 |
| Childrens' programmes don't need to be shown on the main TV channels, so long as this type of content is on the Internet.....      | 1  |

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## A6. Topline results from the reconvened workshop

### OFCOM Workshops Final Topline Results December 2007

- Results are based on responses given by 25 participants attending the reconvened workshop in London on 24<sup>th</sup> November.
- Treat these results with caution. Results are based on electronic voting during qualitative deliberative events; rigorous quantitative sampling procedures were not undertaken
- Data are unweighted
- As the base size is lower than 50, actual numbers of responses as well as percentages have been included.

#### Q1 How satisfied are you with television today?

*Please choose one option only*

*Base: 25 participants*

|                          | %<br>(n)   |
|--------------------------|------------|
| Very Satisfied .....     | 0<br>(0)   |
| Fairly Satisfied .....   | 48<br>(12) |
| Neither .....            | 16<br>(4)  |
| Fairly Dissatisfied..... | 32<br>(8)  |
| Very Dissatisfied.....   | 4<br>(1)   |

#### Q2 PSB programming on Digital channels is...?

*Please choose one option only*

*Base: 25 participants*

|                       | Before<br>% (n) | After<br>%<br>(n) |
|-----------------------|-----------------|-------------------|
| Essential .....       | 32 (8)          | 35<br>(9)         |
| Nice to have.....     | 60<br>(15)      | 56<br>(14)        |
| A Waste of time ..... | 8 (2)           | 9 (2)             |

**Q3 PSB programming on the internet is...?**

*Please choose one option only*

*Base: 25 participants*

|                       | <b>Before</b> | <b>After</b> |
|-----------------------|---------------|--------------|
|                       | % (n)         | %<br>(n)     |
| Essential .....       | 17 (4)        | 25<br>(6)    |
| Nice to have.....     | 79<br>(20)    | 75<br>(19)   |
| A Waste of time ..... | 4 (1)         | 0 (0)        |

**Q4 Which of the following three options would you recommend to OFCOM for the future of PSB ...?**

*Please choose one option only*

*Base: 25 participants*

|  | <b>Before</b> | <b>After</b> |
|--|---------------|--------------|
|  | % (n)         | % (n)        |
| BBC as the only provider of PSB with funding as now. No overall increase in the funding of PSB ....                                    | 25 (6)        | 17<br>(4)    |
| BBC funding reduced in order to enable ITV, Channel 4 and Five to continue to provide PSB. No overall increase in funding of PSB,..... | 37 (9)        | 50<br>(13)   |
| BBC, ITV, Channel 4 and Five to continue to provide PSB. This will mean an increase in funding of PSB .....                            | 38<br>(10)    | 33<br>(8)    |

**Q5 Hard choice**

*Please choose one option only*

*Base: 25 participants*

|   | % (n)      |
|---|------------|
| Public Service Broadcasting should just be concentrated on the main five channels .....   | 46<br>(12) |
| Public Service funding should not concentrate on the five main channels but should also be provided for digital channels and websites ..... | 54<br>(13) |



**Q6 Which of the following have to be provided on more than 1 of the main TV channels?**

*Please choose one option only*

*Base: 25 participants*

|  | <b>Before</b> | <b>After</b> |
|--|---------------|--------------|
|  | % (n)         | %<br>(n)     |
| News.....                                  | 28 (7)        | 26<br>(6)    |
| Serious Factual Programming .....          | 16 (4)        | 18<br>(5)    |
| News about my nation/region .....          | 22 (6)        | 25<br>(6)    |
| Other Programs about my nation/region..... | 13 (3)        | 13<br>(3)    |
| Current affairs .....                      | 21 (5)        | 18<br>(5)    |

**Q7 How much do you agree or disagree with the following statement?**

*Please choose one option only*

**“It is important that TV channels other than the BBC (CBeebies, CBBC, BBC) provide children’s programmes that reflect life in the UK**

*Base: 25 participants*

|                         | <b>Before</b> | <b>After</b> |
|-------------------------|---------------|--------------|
|                         | % (n)         | %<br>(n)     |
| Agree Strongly .....    | 21 (5)        | 13<br>(3)    |
| Agree .....             | 55<br>(14)    | 61<br>(15)   |
| Neither .....           | 8 (2)         | 9 (2)        |
| Disagree .....          | 8 (2)         | 9 (2)        |
| Disagree Strongly ..... | 4 (1)         | 4 (1)        |
| Don’t Know .....        | 4 (1)         | 4 (1)        |

## A7. Recruitment questionnaire

### Recruitment Questionnaire

Ipsos  
MORI/31644

OFCOM Workshops

DATE:  
RESPONDENT  
RECRUITED  
FOR:

**Specification - This questionnaire recruits 35 people with the following characteristics**

|                       |   |
|-----------------------|---|
| Quota 1 – Area        | Workshop 1: London<br>Workshop 2: Birmingham<br>Workshop 3: Edinburgh<br>Workshop 4: Cardiff<br>Workshop 5: Exeter<br>Workshop 6: Belfast |
| Quota 2 – Class       | Workshop 1: ABC1C2D<br>Workshops 2,3: C2DE<br>Workshops 4,5,6: BC1C2  |
| Quota 3 – Sex         | All Workshops: Equal mix of men and women   |
| Quota 4 - Age         | Workshops 1,3,4,5,6: 17 aged 18-44, 13 aged 45-65, 5 aged 65-70<br>Workshop 2: 6 aged 16-18, 6 aged 19-24, 12 aged 25-44, 12 aged 45-60   |
| Quota 5 – Platform    | See table in instructions   |
| Quota 6 – Lifestage   | Please recruit a mix at Q14, Q16, Q17   |
| Quota 7 – TV Watching | All workshops: 4 light viewers, 12 medium and 4 heavy viewers   |
| Quota 8 - Internet    | At least 8 participants with NO internet access at home   |
| Quota 9 - Rurality    | Please ensure that at least 12 respondents for each group are from rural areas  |

30 respondents to be recruited for each Workshop.

Good morning/afternoon/evening. I'm from Ipsos MORI, the Market & Opinion Research company. We're currently conducting some research about television, and would like you to take part in a consultation workshop about the future of television on behalf of Ofcom which is the regulator for the UK communications industries. This will take place at a venue in ..., on ... at.... We would like you to come for the whole day; there will be about 30 people there, it should be fun, interesting and not too difficult and there will be various activities and projects to carry out during the day. The workshop will be filmed.

To say thank you we would like to offer £75 for coming along.

We are looking for particular groups of people, therefore I would like to ask you some questions about you. All information collected will be anonymised.

Q1. Would you be interested in taking part?

|     |   |          |
|-----|---|----------|
| Yes | 1 | CONTINUE |
| No  | 2 | CLOSE    |

Q2. SHOWCARD A Firstly, do you/have you or any of your immediate family work/ever worked in the following jobs or industries? READ OUT

|                           |   |                 |
|---------------------------|---|-----------------|
| Market research           | 1 | THANK AND CLOSE |
| Public relations          | 2 |                 |
| Advertising               | 3 |                 |
| Journalism                | 4 |                 |
| PR                        | 5 |                 |
| IT                        | 6 |                 |
| Television, Film or Radio | 7 |                 |
| None of these             | 8 |                 |
|                           |   | CONTINUE        |

Q3. Have you attended a group discussion for research purposes in the last year?

|     |   |                 |
|-----|---|-----------------|
| Yes | 1 | THANK AND CLOSE |
| No  | 2 | CONTINUE        |

Q4. GENDER

|        |   |                  |
|--------|---|------------------|
| Male   | 1 | RECRUIT TO QUOTA |
| Female | 2 |                  |

Q5. RURALITY

|       |   |                  |
|-------|---|------------------|
| Urban | 1 | RECRUIT TO QUOTA |
| Rural | 2 |                  |

Q AGE  
6.

EXACT AGE



PLEASE ENSURE A  
RANGE OF AGES WITHIN  
EACH AGE BAND

|            |   |                  |
|------------|---|------------------|
| 15 or less | 1 | THANK AND CLOSE  |
| 16-18      | 2 | RECRUIT TO QUOTA |
| 19-24      | 3 | RECRUIT TO QUOTA |
| 25-44      | 4 | RECRUIT TO QUOTA |
| 45-65      | 5 | RECRUIT TO QUOTA |
| 69-70      | 6 | RECRUIT TO QUOTA |
|            |   |                  |

Q7. How much television do you watch a day on average? CHECK QUOTAS

|                              |   |                                     |
|------------------------------|---|-------------------------------------|
| More than 5 hours a day      | 1 | Recruit as heavy television viewer  |
| Between 2-5 hours            | 2 | Recruit as medium television viewer |
| Less than 2 hours            | 3 | Recruit as light television viewer  |
| Hardly/never watch TV at all | 4 | THANK AND CLOSE                     |

Q8. SHOWCARD B: Which, if any, of the following do you have? READ OUT  
a CHECK QUOTAS AND RECRUIT Multicode OK

|  |   |  |
|--|---|--|
| Sky dish   | 1 | GOTO Q8b                               |
| Cable (e.g. NTL, Telewest, Homechoice, Virgin)   | 2 | GOTO Q8b                               |
| A PVR such as TiVo or Sky Plus – that allows you to record programmes without the need for a video cassette or DVD. It also allows you to pause live programming | 3 | GOTO Q9                                |
| High definition television   | 4 | GOTO Q9                                |
| Freeview (Or Old On digital box)   | 5 | GOTO Q9                                |
| None of the above (just analogue TV)   | 6 | Recruit as terrestrial viewer. GOTO Q9 |

Q8b How long have you had satellite or cable?

|            |   |                                   |
|------------|---|-----------------------------------|
| 1-2 years  | 1 | Recruit a range for each workshop |
| 3-5 years  | 2 |                                   |
| 6-10 years | 3 |                                   |
| 10 years + | 4 |                                   |

- Q Thinking about television in the UK as a whole, across the main channels such as BBC1/2, ITV1, Channel 4 and Five, as well as cable, satellite and digital channels offered by people like Sky, how satisfied are you with television available to you at the moment?

| Very<br>satisfied | Quite<br>satisfied | Neither<br>satisfied<br>nor<br>dissatisfied | Quite<br>dissatisfied | Very<br>dissatisfied |
|-------------------|--------------------|---|-----------------------|----------------------|
| 1                 | 2                  | 3   | 4                     | 5                    |

- Q SHOWCARD C: How good or bad do you think television as a whole in the UK is at providing each of the following?

|  | Very<br>good | Quite<br>good | Neither<br>good<br>nor bad | Quite<br>bad | Very<br>bad |
|--|--------------|---------------|----------------------------|--------------|-------------|
| Providing programmes that are entertaining                     | 1            | 2             | 3                          | 4            | 5           |
| Giving good value for money                                    | 1            | 2             | 3                          | 4            | 5           |
| Programmes that you can learn useful things from               | 1            | 2             | 3                          | 4            | 5           |
| Providing something for everyone                               | 1            | 2             | 3                          | 4            | 5           |
| Providing programmes that are challenging or thought-provoking | 1            | 2             | 3                          | 4            | 5           |
| Coming up with new and innovative programme ideas              | 1            | 2             | 3                          | 4            | 5           |
| Providing a wide variety of different kinds of programme       | 1            | 2             | 3                          | 4            | 5           |
| Providing programmes that don't insult our intelligence        | 1            | 2             | 3                          | 4            | 5           |

- Q SHOWCARD D: Which of the following types of TV programmes do you like to  
11. watch? (READ OUT EXAMPLES IF PEOPLE ARE UNSURE OF TYPES OF PROGRAMME)

CHECK QUOTAS FOR EACH WORKSHOP

|   |  |    |
|---|--|----|
| News  |  | 1  |
| Current Affairs   | (e.g. Tonight with Trevor Macdonald)               | 2  |
| Arts and classical music  | (Such as Newsnight review)                         | 3  |
| Reality TV  | (e.g. Big Brother, Hell's Kitchen)                 | 4  |
| Religious   | (Such as Songs of Praise)                          | 5  |
| Serious Factual (including science, nature and wildlife programmes) | (Such as Naturewatch)                              | 6  |
| Other factual inc. hobbies and leisure, and consumer affairs        | (Such as Grand Designs, Watchdog, Property Ladder) | 7  |
| Education   |  | 8  |
| Drama   |  | 9  |
| Films   |  | 10 |
| Sport   |  | 11 |
| Light entertainment and contemporary music                          | (Such as X Factor)                                 | 12 |
| Regional news   |  | 13 |
| Regional current affairs  |  | 14 |
| Regional programmes excl. news and current affairs                  |  | 15 |
| Soaps   |  | 16 |
| Comedy  |  | 17 |

- Q Which is your favourite terrestrial channel? READ OUT  
12.

|           |   |
|-----------|---|
| BBC1      | 1 |
| BBC2      | 2 |
| ITV       | 3 |
| Channel 4 | 4 |
| Channel 5 | 5 |

- Q Do you have internet access in your home? SINGLE CODE ONLY  
13.

|                 |   |                  |
|-----------------|---|------------------|
| Yes- Dialup     | 1 |                  |
| Yes - Broadband | 2 | RECRUIT TO QUOTA |
| No              | 3 |                  |

- Q Do you ever watch TV via the internet/mobile phone? SINGLE CODE ONLY  
14.

|     |   |
|-----|---|
| Yes | 1 |
| No  | 2 |

Q BELFAST ONLY What is your religious denomination? SINGLE CODE  
 15. ONLY  
 RECRUIT TO QUOTA

|              |   |
|--------------|---|
| Protestant   | 1 |
| Catholic     | 2 |
| Refused/None | 3 |

Q Are you currently ... READ OUT  
 16.

|                   |   |                 |
|-------------------|---|-----------------|
| Working full-time | 1 |                 |
| Working part-time | 2 | RECRUIT A RANGE |
| Not working       | 3 |                 |
| Retired           | 4 |                 |

Q Do you currently live with a partner? SINGLE CODE ONLY  
 17.

|     |   |           |
|-----|---|-----------|
| Yes | 1 | ASK Q16   |
| No  | 2 | GO TO Q17 |

ASK IF HAVE PARTNER

Q Is your partner currently ... READ OUT  
 18.

|                   |   |                 |
|-------------------|---|-----------------|
| Working full-time | 1 |                 |
| Working part-time | 2 | RECRUIT A RANGE |
| Not working       | 3 |                 |
| Retired           | 4 |                 |

Q SHOWCARD E: Which of the following apply to you? I am the parent or  
 19. legal guardian of ... CODE ALL THAT APPLY

|   |   |                 |
|---|---|-----------------|
| ... child/ren aged 0-3                                  | 1 |                 |
| ... child/ren aged 4-11                                 | 2 |                 |
| ... child/ren aged 12-15                                | 3 |                 |
| ... child/ren aged 16+ still living at home             | 4 | RECRUIT A RANGE |
| ... child/ren aged 16+ who are no longer living at home | 5 |                 |



Q SHOWCARD F: Which of these best describes your household?  
20. SINGLE CODE ONLY

**WHITE**

British 1  
Irish 2  
Any other white background 3

**MIXED**

White and Black Caribbean 4  
White and Black African 5  
White and Asian 6  
Any other mixed background 7

**ASIAN**

Indian 8  
Pakistani 9  
Bangladeshi 0  
Any other Asian background X

**BLACK OR BLACK BRITISH**

Caribbean Y  
African 1  
Any other black background 2

**CHINESE OR OTHER ASIAN**

Chinese 3  
Any other background 4

Occupation of Chief Income Earner  
Position/rank/grade

Industry/type of company

Quals/degree/apprenticeship

Number of staff responsible for

REMEMBER TO PROBE FULLY FOR  
PENSION AND CODE FROM ABOVE  
Class

|    |   |               |    |
|----|---|---------------|----|
| A  | 1 | RECRUIT QUOTA | TO |
| B  | 2 | RECRUIT QUOTA | TO |
| C1 | 3 | RECRUIT QUOTA | TO |
| C2 | 4 | RECRUIT QUOTA | TO |
| D  | 5 | RECRUIT QUOTA | TO |

E 6 QUOTA RECRUIT TO  
QUOTA

Interviewer number:

Interviewer name (CAPS):

I confirm that I have conducted this interview face to face/by telephone with the above person and that I asked all the relevant questions and recorded the answers in conformance with the survey specifications and with the MRS Code of Conduct and the Data Protection Act.

Interviewer Signature:

Date:

MORI/31644 Television

OFCOM workshops

DATE:  
RESPONDENT  
RECRUITED  
FOR:

Details

Location:

Date:

Time:

Name/Initial/Title: Mr/Mrs/Ms/Miss

Address:

Full

☐☐☐☐☐☐☐☐

Tel. Number (WRITE IN INCL.  
STD code)

|                      |   |
|----------------------|---|
| Home/mobile          | 1 |
| Work                 | 2 |
| Refused/Ex-directory | 3 |

Is respondent willing to take  
part and available?

|     |   |
|-----|---|
| Yes | 1 |
| No  | 2 |

Is respondent willing to be  
recontacted for the  
reconvened group in London  
on the 24<sup>th</sup> November?  
(expenses will be provided)

|     |   |
|-----|---|
| Yes | 1 |
| No  | 2 |

## A8. Sample breakdown

|                           | Edinburgh | Belfast | Swansea | Durham | London | Birmingham | Totals     |
|---------------------------|-----------|---------|---------|--------|--------|------------|------------|
| <b>Total participants</b> | 37        | 34      | 27      | 33     | 27     | 28         | <b>186</b> |
| <b>Gender</b>             |           |         |         |        |        |            |            |
| Male                      | 19        | 15      | 7       | 17     | 15     | 14         | <b>87</b>  |
| Female                    | 18        | 19      | 20      | 16     | 12     | 14         | <b>99</b>  |
| <b>Social class</b>       |           |         |         |        |        |            |            |
| AB                        | 0         | 14      | 6       | 11     | 7      | 0          | <b>38</b>  |
| C1C2                      | 18        | 20      | 21      | 22     | 16     | 16         | <b>113</b> |
| DE                        | 19        | 0       | 0       | 0      | 4      | 12         | <b>35</b>  |
| <b>Age</b>                |           |         |         |        |        |            |            |
| 18-44                     | 17        | 18      | 15      | 17     | 12     | 20         | <b>99</b>  |
| 45-65                     | 14        | 11      | 11      | 11     | 5      | 7          | <b>59</b>  |
| 65+                       | 6         | 5       | 1       | 5      | 10     | 1          | <b>28</b>  |
| <b>Internet access</b>    |           |         |         |        |        |            |            |
| Internet                  | 28        | 26      | 20      | 25     | 21     | 23         | <b>143</b> |
| No internet               | 9         | 8       | 7       | 8      | 6      | 5          | <b>43</b>  |
| <b>Platform usage</b>     |           |         |         |        |        |            |            |
| Sky/Cable                 | 16        | 17      | 10      | 15     | 15     | 12         | <b>85</b>  |
| Freeview                  | 12        | 8       | 10      | 9      | 10     | 10         | <b>59</b>  |
| Analogue                  | 9         | 9       | 7       | 9      | 2      | 6          | <b>42</b>  |

## A9. Quantitative questionnaires

Ipsos MORI/31644BB01  
1-5

Questionnaire No:

|           |    |
|-----------|----|
| Serial No |    |
| OUO (6-9) |    |
| CARD 1    | 10 |

### Ofcom PSB Survey – England (Version 1) Final Questionnaire

Sample Point Number:

Sample point name:

#### SECTION A: DEMOGRAPHICS

##### Sampling Point Summary:

##### CABLE (SINGLE CODE)

|                    |   |      |
|--------------------|---|------|
| Cable Coverage     | 1 |      |
| Non-Cable Coverage | 2 | (11) |

##### URBAN/RURAL (SINGLE CODE)

|                                |   |      |
|--------------------------------|---|------|
| Cities/large towns – urban- GB | 1 |      |
| Medium-Size towns – urban- GB  | 2 |      |
| Small towns – urban- GB        | 3 |      |
| Rural - GB                     | 4 |      |
| Urban - NI                     | 5 |      |
| Rural - NI                     | 6 | (12) |

##### DEPRIVATION (SINGLE CODE )

|                    |   |      |
|--------------------|---|------|
| Low Deprivation    | 1 |      |
| Medium Deprivation | 2 |      |
| High Deprivation   | 3 | (13) |

##### GEOGRAPHIC AREA (Government Region) (SINGLE CODE)

|                    |   |      |
|--------------------|---|------|
| London             | 1 |      |
| South East         | 2 |      |
| South West         | 3 |      |
| East Midlands      | 4 |      |
| West Midlands      | 5 |      |
| North East         | 6 |      |
| North West         | 7 |      |
| East England       | 8 |      |
| Yorkshire & Humber | 9 |      |
| Scotland           | 0 |      |
| Wales              | X |      |
| Northern Ireland   | Y | (14) |

##### QA Gender

|        |   |      |
|--------|---|------|
| Male   | 1 |      |
| Female | 2 | (15) |

WRITE IN & CODE EXACT AGE

QB    **Exact**          
**Age**                      (16)                      (17)

|  |       |   |      |
|--|-------|---|------|
|  | 16-17 | 1 |      |
|  | 18-24 | 2 |      |
|  | 25-34 | 3 |      |
|  | 35-44 | 4 |      |
|  | 45-54 | 5 |      |
|  | 55-64 | 6 |      |
|  | 65-74 | 7 |      |
|  | 75+   | 8 | (18) |

### Interviewer Declaration

I confirm that I have carried out this Interview face-to-face with the named person of the address attached and that I asked all the relevant questions fully and recorded the answers in conformance with the survey specification and within the MRS Code of Conduct and the Data Protection Act 1998.

Signature: .....

Interviewer Name (CAPS): .....

.....

Interviewer Number:

-                   
 (19)    (20)    (21)    (22)    (23)    (24)                      (19-24)

Day of Interview    1    2    3    4    5    6    7  
                                     (Mon)                      (Thur)                      (Sun)                      (25)

Date of Interview:      /   /07                      (26-

Length of Interview:      (minutes)                      (30-

**QC Respondent is: SINGLE  
CODE**

|  |   |
|--|---|
| Working full time (30hrs/wk+)  | 1 |
| Working part time (8-29hrs/wk)   | 2 |
| Not working (i.e. under 8hrs/week-retired)   | 3 |
| Not working (i.e. under 8hrs/week)-unemployed (registered/not registered but looking for work) | 4 |
| Not working (i.e. under 8hrs/week)-student   | 5 |
| Not working (i.e. under 8hrs/week)-housewife /disabled /other                                  | 6 |
| Don't know   | 7 |

(32)

**QD SHOWCARD T Which of the groups on this card, if any, would you say you belong to? SINGLE CODE ONLY**

|                                      |      |
|--------------------------------------|------|
| <b>WHITE</b>                         | (33) |
| British                              | 1    |
| Irish                                | 2    |
| Any other white background           | 3    |
| <b>MIXED</b>                         |      |
| White and Black Caribbean            | 4    |
| White and Black African              | 5    |
| White and Asian                      | 6    |
| Any other mixed background           | 7    |
| <b>ASIAN OR ASIAN BRITISH</b>        |      |
| Indian                               | 8    |
| Pakistani                            | 9    |
| Bangladeshi                          | 0    |
| Any other Asian background           | X    |
| <b>BLACK OR BLACK BRITISH</b>        |      |
| Caribbean                            | Y    |
|                                      | (34) |
| African                              | 1    |
| Any other black background           | 2    |
| <b>CHINESE OR OTHER ETHNIC GROUP</b> |      |
| Chinese                              | 3    |
| Any other background                 | 4    |
| Refused                              | 5    |

**QE Home is: SINGLE  
CODE**

|   |   |
|---|---|
| Being bought on mortgage                              | 1 |
| Owned outright by household                           | 2 |
| Rented from Local Authority/Housing Association/Trust | 3 |
| Rented from private landlord                          | 4 |
| Other   | 5 |
| Don't know  | 6 |

(35)

**QF Occupation of Chief Income Earner**

Position/rank/grade

Industry/type of company

Quals/degree/apprenticeship

Number of staff responsible for

REMEMBER TO PROBE FULLY AND CODE FROM ABOVE

**QG Class**

|    |   |
|----|---|
| A  | 1 |
| B  | 2 |
| C1 | 3 |
| C2 | 4 |
| D  | 5 |
| E  | 6 |

(36)

**QH Total number in household (including respondent and any children)**

(37)

**Number of children in household (Under 16)**

(38)

ASK IF HAVE AT LEAST ONE CHILD IN HH  
(UNDER 16)

QI **How old is/are your child/ren?** MULTICODE  
OK

|            |      |
|------------|------|
|            | (39) |
| 1 or under | 1    |
| 2          | 2    |
| 3          | 3    |
| 4          | 4    |
| 5          | 5    |
| 6          | 6    |
| 7          | 7    |
| 8          | 8    |
| 8          | 9    |
| 10         | 0    |
| 11         | X    |
| 12         | Y    |
|            | (40) |
| 13         | 1    |
| 14         | 2    |
| 15         | 3    |

(39-40)

ASK ALL WITH CHILDREN UNDER 16 IN THE  
HOUSEHOLD

QJ **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 |

(41)

ASK ALL

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

|            |      |                           |
|------------|------|---------------------------|
|            | YOU  | OTHER<br>H/HOLD<br>MEMBER |
|            | (42) | (43)                      |
| Yes        | 1    | 1                         |
| No         | 2    | 2                         |
| Don't know | 3    | 3                         |

(42-43)

ASK ALL

QL **SHOWCARD U (R) Would you please  
tell me the letter from this card for  
the group in which you would place  
your total household income from  
all sources before tax and  
deductions.** REASSURE ABOUT  
CONFIDENTIALITY

|   |                   |      |  |
|---|-------------------|------|--|
|   |                   | (44) |  |
| B | Less than £11,500 | 1    |  |
| E | £11,500 - £17,499 | 2    |  |
| D | £17,500 - £29,999 | 3    |  |
| A | £30,000 - £49,999 | 4    |  |
| C | £50,000 and over  | 5    |  |
|   | Refused           | 6    |  |
|   | Don't know        | 7    |  |
|   |                   | (44) |  |

(44)

#### MOBILE PHONES

QM **Do you personally use a  
mobile phone** SINGLE CODE

|            |   |
|------------|---|
| Yes        | 1 |
| No         | 2 |
| Don't know | 3 |

(45)

INTERVIEWER RECORD END TIME AFTER DEMOGRAPHICS

|                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Hours                |                      | Mins                 |                      |

INTERVIEWER RECORD START TIME

|                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Hours                |                      | Mins                 |                      |

**INTRODUCTION/CONFIDENTIALITY**

Good morning, afternoon, evening. My name is ..... from Ipsos MORI, the research organisation, and we are carrying out a survey for Ofcom, the independent body set up by the Government to oversee broadcasting and telecommunications in the UK. We'd like you to answer some questions about television in the UK – what's good and bad about it, and which channels should show which type of programmes. This is your opportunity for you to help shape the future of television. The survey will take about 35 minutes. We also want to find out your views about the internet and other types of media (such as radio, newspapers etc).

Initially, we would like to ask you some broad questions about your attitudes towards television and the media in general.

**I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual or address in the results.**

**TELEVISION VIEWING**

ASK ALL

Q1. **First of all, on an average day how many hours would you say you watch TV? SINGLE CODE**

|                     |   |
|---------------------|---|
| Up to about an hour | 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 |

(11)

Q2. **SHOWCARD A (R) Which, if any, of these types of television does your household receive at the moment? MULTICODE OK**

|   |   |   |          |
|---|---|---|----------|
| A | Only the main channels (BBC One, BBC Two, ITV1, Channel 4 and Five)   | 1 | GO TO Q5 |
| B | Cable TV (through NTL / Telewest / Virgin Media)  | 2 | GO TO Q4 |
| C | Satellite TV (Sky)  | 3 | ASK Q3   |
| D | Satellite TV (Other)  | 4 |          |
| E | Freeview (through a set-top box or digital television set) with ONLY free channels  | 5 | GO TO Q4 |
| F | 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 |          |
| G | Digital TV via a broadband DSL line (from HomeChoice or Kingston Communications)  | 7 |          |
|   | Any other mention of Virgin   | 8 | GO TO Q5 |
|   | Other (please write in and code 9)  | 9 |          |



|  |                                  |          |      |
|--|----------------------------------|----------|------|
|  |                                  |          | (12) |
| No TV in household   | 0                                | GO TO Q7 |      |
| Don't know   | X                                | GO TO Q5 |      |
| Q3. ASK THOSE WITH SATELLITE TV (CODES 3-4 AT Q2)<br><b>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</b> |                                  |          |      |
| Receive subscription channels<br>(pay a monthly subscription fee)  | 1                                |          | (13) |
| Free-to-air services only (no<br>monthly subscription fee)   | 2                                |          |      |
| Don't know   | 3                                |          |      |
| Q4. ASK THOSE WITH MULTICHANNEL TV (CODES 2-8 AT Q2)<br><b>Does your household have a device that has a hard disc and allows you to pause, rewind and record live TV programmes? These are sometimes known as Sky +, V+, Tivo or Telewest drive. SINGLE CODE</b>                             |                                  |          |      |
| Yes  | 1                                |          | (14) |
| No   | 2                                |          |      |
| Don't know   | 3                                |          |      |
| ASK ALL WITH TV IN HOUSEHOLD<br>Q5. SHOWCARD B (R) <b>Which of these television channels and services, if any, would you say you watch regularly? That is, a few times a week. MULTICODE OK</b>  |                                  |          |      |
| A  | BBC One                          | 1        | (15) |
| B  | BBC Two                          | 2        |      |
| C  | ITV1                             | 3        |      |
| D  | Channel 4                        | 4        |      |
| E  | Five                             | 5        |      |
| F  | Teletext or Ceefax               | 6        |      |
|  | <i>Spare line for Wales only</i> |          |      |
|  | None of them                     | 8        |      |
|  | Don't know                       | 9        |      |

Q6. SHOWCARD C (R) And which of the following types of programmes, if any, would you say you watch regularly on the main TV channels (that is BBC One, BBC Two, ITV1, Channel 4 and Five)? MULTICODE OK

|   |   |      |
|---|---|------|
|   |   | (16) |
| A | News  | 1    |
| B | Current Affairs programmes such as Tonight with Trevor McDonald and Panorama  | 2    |
| C | Arts and classical music  | 3    |
| D | Children's  | 4    |
| E | Religious   | 5    |
| F | Serious Factual, including history, nature or science programmes  | 6    |
| G | Other factual programmes including hobbies, leisure and consumer affairs e.g. Masterchef, Traffic Cops, and The Gadget Show | 7    |
| H | Programmes of an educational nature   | 8    |
| I | Soaps   | 9    |
| J | Drama   | 0    |
| K | Films   | X    |
| L | Sport   | Y    |
|   |   | (17) |
| M | Entertainment and contemporary music e.g My Family, Strictly Come Dancing and X Factor                                      | 1    |
| N | Comedy  | 2    |
| O | <b>1.1.1.1 News about my region</b>   | 3    |
| P | Current affairs about my region   | 4    |
| Q | Aside from news and current affairs, other programmes about my region   | 5    |
|   | Other   | 0    |
|   | None of these   | X    |
|   | Don't know  | Y    |

(16-17)

# INTERNET USAGE

I would now like to ask you about the internet

Q7. ASK ALL

**Do you personally use the internet?** SINGLE CODE

|            |   |           |
|------------|---|-----------|
| Yes        | 1 | ASK Q8    |
| No         | 2 | GO TO Q11 |
| Don't know | 3 |           |

(18)

Q8. ASK THOSE WITH INTERNET ACCESS (CODE 1 AT Q7)

**Where do you access the internet?** MULTICODE OK

|  |   |           |
|--|---|-----------|
| At home  | 1 | ASK Q9    |
| At work (out of home)  | 2 | GO TO Q10 |
| At a public place (internet café,<br>library, by mobile phone, etc.) | 3 |           |
| At university / college  | 4 |           |
| At school  | 5 |           |
| Elsewhere (friends, relatives,<br>etc.)                              | 6 |           |
| Other  | 7 |           |
| Don't know   | 8 |           |

(19)

Q9. ASK THOSE WITH INTERNET ACCESS AT HOME (CODE 1 AT Q8)

**SHOWCARD D (R) And which of these methods does your household use to connect to the Internet at home? Just read out the letter or letters that apply.** MULTICODE OK

|   |   |   |
|---|---|---|
| A | Ordinary phone line – dial-up<br>access   | 1 |
| B | Broadband - high-speed access,<br>allowing you to make telephone<br>calls at the same time as using<br>the internet | 2 |
| C | Wireless access through a<br>wireless router, WIFI or portable<br>device  | 3 |
|   | Other (please write in and code<br>4)   | 4 |
|   | Don't know  | 5 |

(20)

Q10. ASK THOSE WITH ANY INTERNET ACCESS (CODE 1 AT Q7)

**How often do you tend to use the internet?** SINGLE CODE ONLY

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

(21)

# CROSS-PLATFORM PREFERENCES FOR DIFFERENT TYPES OF CONTENT

ASK ALL

Throughout this questionnaire, I am going to be asking you questions about the main TV channels. When I ask you about these, I am talking about the five main TV channels – BBC One, BBC Two, ITV1, Channel 4, and Five

READ OUT a-e AND ROTATE ORDER LIST. TICK START.

Q11. SHOWCARD E (R) Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? MULTICODE OK

Q12. And which of these different media would you say is your main source for... ?SINGLE CODE INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS.

|            |  | a.<br>Entertainment      |      | b.<br>News about<br>the UK |      | c.<br>News about<br>the World |      | d.<br>News about your<br>region |      | e.<br>News about<br>your local<br>area |      |
|------------|--|--------------------------|------|----------------------------|------|-------------------------------|------|---------------------------------|------|--|------|
|            |  | ALL                      | MAIN | ALL                        | MAIN | ALL                           | MAIN | ALL                             | MAIN | ALL                                    | MAIN |
| TICK START |  | <input type="checkbox"/> |      | <input type="checkbox"/>   |      | <input type="checkbox"/>      |      | <input type="checkbox"/>        |      | <input type="checkbox"/>               |      |
|            |  | (22)                     | (24) | (26)                       | (28) | (30)                          | (32) | (34)                            | (36) | (38)                                   | (40) |
| A          | TV on the main channels  | 1                        | 1    | 1                          | 1    | 1                             | 1    | 1                               | 1    | 1                                      | 1    |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2                        | 2    | 2                          | 2    | 2                             | 2    | 2                               | 2    | 2                                      | 2    |
| C          | Radio  | 3                        | 3    | 3                          | 3    | 3                             | 3    | 3                               | 3    | 3                                      | 3    |
| D          | Newspapers   | 4                        | 4    | 4                          | 4    | 4                             | 4    | 4                               | 4    | 4                                      | 4    |
| E          | Magazines  | 5                        | 5    | 5                          | 5    | 5                             | 5    | 5                               | 5    | 5                                      | 5    |
| F          | Books  | 6                        | 6    | 6                          | 6    | 6                             | 6    | 6                               | 6    | 6                                      | 6    |
| G          | Internet via pc or laptop  | 7                        | 7    | 7                          | 7    | 7                             | 7    | 7                               | 7    | 7                                      | 7    |
| H          | Teletext or Ceefax   | 8                        | 8    | 8                          | 8    | 8                             | 8    | 8                               | 8    | 8                                      | 8    |
| I          | Videos/DVDs  | 9                        | 9    | 9                          | 9    | 9                             | 9    | 9                               | 9    | 9                                      | 9    |
| J          | Computer games/games console   | 0                        | 0    | 0                          | 0    | 0                             | 0    | 0                               | 0    | 0                                      | 0    |
|            | Other  | X                        | X    | X                          | X    | X                             | X    | X                               | X    | X                                      | X    |
|            | I'm not interested in this   | Y                        | Y    | Y                          | Y    | Y                             | Y    | Y                               | Y    | Y                                      | Y    |
|            |  | (23)                     | (25) | (27)                       | (29) | (31)                          | (33) | (35)                            | (37) | (39)                                   | (41) |
|            | None   | 1                        | 1    | 1                          | 1    | 1                             | 1    | 1                               | 1    | 1                                      | 1    |
|            | Don't know   | 2                        | 2    | 2                          | 2    | 2                             | 2    | 2                               | 2    | 2                                      | 2    |

22-41)

- Q11 READ OUT f - i AND ROTATE ORDER LIST. TICK START.  
SHOWCARD E (R) AGAIN Which of these different media available to you (such as television, radio, internet etc) would you say you use as a source for each of the following categories? MULTICODE OK
- Q12 And which of these different media would you say is your main source for...?INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS. SINGLE CODE

|            |  | f.<br>Your<br>personal<br>interests<br>and<br>pastimes |                                  | g.<br>Knowledge<br>about<br>topics such<br>as arts,<br>science<br>nature or<br>history |                                  | h<br>Sports news<br>and<br>information |                                  | i<br>Finding out<br>about people<br>with <u>similar</u><br>interests to<br>your own |                                  |
|------------|--|--|----------------------------------|--|----------------------------------|--|----------------------------------|---|----------------------------------|
|            |  | ALL  | MAIN                             | ALL  | MAIN                             | ALL                                    | MAIN                             | ALL   | MAIN                             |
| TICK START |  | <input type="checkbox"/><br>(42)                       | <input type="checkbox"/><br>(44) | <input type="checkbox"/><br>(46)   | <input type="checkbox"/><br>(48) | <input type="checkbox"/><br>(50)       | <input type="checkbox"/><br>(52) | <input type="checkbox"/><br>(54)  | <input type="checkbox"/><br>(56) |
| A          | TV on the main channels  | 1  | 1                                | 1  | 1                                | 1                                      | 1                                | 1   | 1                                |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2  | 2                                | 2  | 2                                | 2                                      | 2                                | 2   | 2                                |
| C          | Radio  | 3  | 3                                | 3  | 3                                | 3                                      | 3                                | 3   | 3                                |
| D          | Newspapers   | 4  | 4                                | 4  | 4                                | 4                                      | 4                                | 4   | 4                                |
| E          | Magazines  | 5  | 5                                | 5  | 5                                | 5                                      | 5                                | 5   | 5                                |
| F          | Books  | 6  | 6                                | 6  | 6                                | 6                                      | 6                                | 6   | 6                                |
| G          | Internet via pc or laptop  | 7  | 7                                | 7  | 7                                | 7                                      | 7                                | 7   | 7                                |
| H          | Teletext or Ceefax   | 8  | 8                                | 8  | 8                                | 8                                      | 8                                | 8   | 8                                |
| I          | Videos/DVDs  | 9  | 9                                | 9  | 9                                | 9                                      | 9                                | 9   | 9                                |
| J          | Computer games/games console   | 0  | 0                                | 0  | 0                                | 0                                      | 0                                | 0   | 0                                |
|            | Other  | X  | X                                | X  | X                                | X                                      | X                                | X   | X                                |
|            | I'm not interested in this   | Y  | Y                                | Y  | Y                                | Y                                      | Y                                | Y   | Y                                |
|            |  | (43)   | (45)                             | (47)   | (49)                             | (51)                                   | (53)                             | (55)  | (57)                             |
|            | None   | 1  | 1                                | 1  | 1                                | 1                                      | 1                                | 1   | 1                                |
|            | Don't know   | 2  | 2                                | 2  | 2                                | 2                                      | 2                                | 2   | 2 42-57)                         |

- Q11 READ OUT j - k AND ROTATE ORDER LIST. TICK START.  
SHOWCARD E (R) AGAIN Which of these different media available to you (such as television, radio, internet etc) would you say you use as a source for each of the following categories? MULTICODE OK
- Q12 And which of these different media would you say is your main source for...INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS. SINGLE CODE

|            |  | j<br>Finding about<br>people with<br>values and<br>lifestyles that<br><u>are different</u><br>to your own |              | k<br>Discovering<br>new things          |              |
|------------|--|---|--------------|---|--------------|
|            |  | ALL<br><input type="checkbox"/><br>(58)   | MAIN<br>(60) | ALL<br><input type="checkbox"/><br>(62) | MAIN<br>(64) |
| TICK START |  |   |              |   |              |
| A          | TV on the main channels  | 1   | 1            | 1                                       | 1            |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2   | 2            | 2                                       | 2            |
| C          | Radio  | 3   | 3            | 3                                       | 3            |
| D          | Newspapers   | 4   | 4            | 4                                       | 4            |
| E          | Magazines  | 5   | 5            | 5                                       | 5            |
| F          | Books  | 6   | 6            | 6                                       | 6            |
| G          | Internet via pc or laptop  | 7   | 7            | 7                                       | 7            |
| H          | Teletext or Ceefax   | 8   | 8            | 8                                       | 8            |
| I          | Videos/DVDs  | 9   | 9            | 9                                       | 9            |
| J          | Computer games/ games console  | 0   | 0            | 0                                       | 0            |
|            | Other  | X   | X            | X                                       | X            |
|            | I'm not interested in this   | Y   | Y            | Y                                       | Y            |
|            |  | (59)  | (61)         | (63)                                    | (65)         |
|            | None   | 1   | 1            | 1                                       | 1            |
|            | Don't know   | 2   | 2            | 2                                       | 2            |

(58-65)

CARD 3

10

- Q13. SHOWCARD E (R) AGAIN And looking at this list again, which one of these, if any, do you think you would find it hardest to live without? SINGLE CODE ONLY

|   |  |      |
|---|--|------|
|   |  | (11) |
| A | TV on the main channels  | 1    |
| B | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2    |
| C | Radio  | 3    |
| D | Newspapers   | 4    |
| E | Magazines  | 5    |
| F | Books  | 7    |
| G | Internet via pc or laptop  | 8    |
| H | Teletext or Ceefax   | 9    |
| I | Videos/DVDs  | 0    |
| J | Computer games / games console   | X    |
|   | Other  | Y    |
|   |  | (12) |
|   | None   | 1    |

|            |   |         |
|------------|---|---------|
| Don't know | 2 | (11-12) |
|------------|---|---------|

Q14. SHOWCARD F (R) **To what extent do you agree or disagree with each of the following statements about television?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-J AND ROTATE ORDER. TICK START

|                          |   | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--------------------------|---|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
| <input type="checkbox"/> | a. <b>As well as entertaining and informing people, television has an important social role to play</b>                                       | 1                     | 2     | 3  | 4             | 5                             | 6                 | (13) |
|                          | b. <b>Television should help to promote understanding and tolerance of different religions, cultures and lifestyles</b>                       | 1                     | 2     | 3  | 4             | 5                             | 6                 | (14) |
|                          | c. <b>Television's main role should be to provide entertainment rather than information or education</b>                                      | 1                     | 2     | 3  | 4             | 5                             | 6                 | (15) |
|                          | d. <b>I have personally learned useful things from watching television</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (16) |
|                          | e. <b>Television is very influential in shaping public opinion about political and other important issues</b>                                 | 1                     | 2     | 3  | 4             | 5                             | 6                 | (17) |
| <input type="checkbox"/> | f. <b>Television has an important role to play in making people interested in different subjects, like arts, nature, sciences and history</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (18) |
|                          | g. <b>It is important that television is available to everyone</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (19) |
|                          | h. <b>Television has an important role in helping children and teenagers understand life in the UK</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (20) |
| <input type="checkbox"/> | i. <b>With so many channels now available, it's hard to find what I want</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (21) |
|                          | j. <b>TV programmes sometimes change the way I think about things</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (22) |



Q15. SHOWCARD F (R) AGAIN **And to what extent do you agree or disagree with each of the following statements about the internet?** SINGLE CODE ONLY FOR EACH LINE.  
READ OUT STATEMENTS (A-J) AND (K-M) AND ROTATE ORDER – TICK START

|                          |   | Agree<br>Strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--------------------------|---|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
| <input type="checkbox"/> | a. <b>As well as entertaining and informing people, the internet has an important social role to play</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (23) |
|                          | b. <b>The internet should help to promote understanding and tolerance of different religions, cultures and lifestyles</b>                         | 1                     | 2     | 3  | 4             | 5                             | 6                 | (24) |
|                          | c. <b>The internet's main role should be to provide entertainment rather than information or education</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (25) |
| <input type="checkbox"/> | d. <b>The internet is very influential in shaping public opinion about political and other important issues</b>                                   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (26) |
|                          | e. <b>The internet is a valuable source of information and learning</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (27) |
|                          | f. <b>The internet has an important role to play in making people interested in different subjects like the arts, nature, science and history</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (28) |
| <input type="checkbox"/> | g. <b>The internet has an important role to play in helping children and teenagers understand life in the UK</b>                                  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (29) |
|                          | h. <b>The internet is a valuable source of information and entertainment for children and teenagers</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (30) |
|                          | i. <b>It's important that the internet is available to everyone</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (31) |

ASK J-L OF THOSE WITH INTERNET ACCESS. CODE 1 AT Q7.

|  |  | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--|--|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
|  | j. <b>With so many websites on the internet, it's hard to find what I want</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (32) |
|  | k. <b>I have personally learned useful things from the internet</b>            | 1                     | 2     | 3  | 4             | 5                             | 6                 | (33) |
|  | l. <b>Websites sometimes change the way I think about things</b>               | 1                     | 2     | 3  | 4             | 5                             | 6                 | (34) |

Q16. ASK ALL **Thinking about the main TV channels, that is BBC One, BBC Two, ITV1, Channel 4 and Five, would you say you are watching them more, less, or about the same as you were 4-5 years ago?** SINGLE CODE ONLY

|                |   |           |
|----------------|---|-----------|
| More           | 1 | GO TO Q18 |
| About the same | 2 |           |
| Less           | 3 | ASK Q17   |
| Don't know     | 4 | GO TO Q18 |

(35)

Q17. ASK THOSE WHO SAY THEY WATCH LESS TV. CODE 3 AT Q16. OTHERS GO TO Q18  
SHOWCARD G (R) **Could you say why it is you are watching them less than 4-5 years ago?** MULTICODE OK

|   |   |   |
|---|---|---|
| A | I am less interested in watching TV generally now   | 1 |
| B | I have less time to watch TV generally now because I am too busy or have had a change in my circumstances | 2 |
| C | I watch more of the main TV channels' digital channels instead – e.g. BBC Three, E4, Five Life, ITV2      | 3 |
| D | I watch more of other digital channels instead – e.g. Sky One, Sky News, Living, Sky Sports, Sky Movies   | 4 |
| E | I use the internet more instead of watching TV  | 5 |
| F | I play computer games more instead of watching TV   | 6 |
| G | I don't find the programmes as enjoyable/interesting as I used to do                                      | 7 |
| H | There are fewer programmes that appeal to my interests  | 8 |
|   | Other (please write in and code 9)  | 9 |
|   | Don't know  | 0 |

(36)

ASK ALL

## HARD CHOICES: CONTENT PRIORITIES

Different people have different expectations – some people want to see more soaps and reality TV shows while others want more news and documentaries.

Q18. SHOWCARD H (R) I am now going to read out to you a number of different choices relating to the five main television channels, BBC One and Two, ITV1, Channel 4 and Five. For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see. READ OUT STATEMENTS A AND B – SINGLE CODE

|   |  |   |
|---|--|---|
| A | A wide variety of different programme types, for example news, sports, documentaries, entertainment, religious, and the arts | 1 |
| B | More of the popular entertainment programmes that most people want to watch  | 2 |
|   | No preference  | 3 |
|   | Don't know   | 4 |

(37)

Q19. SHOWCARD I (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |  |   |
|---|--|---|
| A | TV programmes that reflect the needs and concerns of different communities within the UK (religious, regional or national, and ethnic) | 1 |
| B | TV programmes that reflect the needs and concerns of the UK as a whole   | 2 |
|   | No preference  | 3 |
|   | Don't know   | 4 |

(38)

Q20. SHOWCARD J (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |  |   |
|---|--|---|
| A | The best TV programmes from the USA, Europe, Australia and other countries | 1 |
| B | A high proportion of programmes made in the UK                             | 2 |
|   | No preference  | 3 |
|   | Don't know   | 4 |

(39)

Q21. SHOWCARD K (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |   |   |
|---|---|---|
| A | Lots of original and experimental programme ideas | 1 |
| B | More of people's tried and tested favourites      | 2 |
|   | No preference                                     | 3 |
|   | Don't know  | 4 |

(40)

Q22. SHOWCARD L (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |   |   |
|---|---|---|
| A | The main channels should provide programmes that are targeted at mass audiences                                       | 1 |
| B | The main channels should provide a range of programmes that are targeted at a wide range of different audience groups | 2 |
|   | No preference   | 3 |
|   | Don't know  | 4 |

(41)

# GENERAL VIEWS ABOUT PARTICULAR CHANNELS

I'd now like to ask you some questions about specific TV channels – BBC, ITV1, Channel 4 and Five.

Q23

SHOWCARD M (R) To what extent do you agree or disagree with each of the following statements about the BBC's television and internet services? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-F AND ROTATE ORDER, TICK START

|                          |  | Agree<br>strongly | Agree | Neither<br>agree<br>nor dis-<br>agree | Disagre<br>e | Disagree<br>strongly | Don't<br>know |      |
|--------------------------|--|-------------------|-------|---------------------------------------|--------------|----------------------|---------------|------|
| <input type="checkbox"/> | a. The BBC should have a responsibility to set high standards  | 1                 | 2     | 3                                     | 4            | 5                    | 6             | (42) |
|                          | b. Given it receives public funding via the licence fee, the BBC should have special responsibilities to show programmes which commercial broadcasters don't | 1                 | 2     | 3                                     | 4            | 5                    | 6             | (43) |
|                          | c. As licence fee payers, we are entitled to expect the BBC to provide more programmes that suit our tastes and interests than other broadcasters            | 1                 | 2     | 3                                     | 4            | 5                    | 6             | (44) |
| <input type="checkbox"/> | d. It is important for the BBC to show a high proportion of programmes which reflect life in the UK  | 1                 | 2     | 3                                     | 4            | 5                    | 6             | (45) |
|                          | e. It's important for the BBC to keep up with new technology, for example, by allowing people to download its programmes onto their computers                | 1                 | 2     | 3                                     | 4            | 5                    | 6             | (46) |
| <input type="checkbox"/> | f. The BBC's website is a useful source of information about my local area and region  | 1                 | 2     | 3                                     | 4            | 5                    | 6             | (47) |

SKIP COL

48

Q24 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about ITV1? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-H AND ROTATE ORDER, TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. <b>ITV1 should concentrate on popular entertainment programmes, drama and soaps, rather than try to do everything</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (49) |
|                          | b. <b>It is important for ITV1 to show a range of programmes about my region aside from news and current affairs</b>     | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (50) |
|                          | c. <b>ITV1 should be free to do whatever it feels it needs to do so that it can continue to attract a large audience</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (51) |
| <input type="checkbox"/> | d. <b>ITV1 should show children's programmes that reflect life in the UK</b>   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (52) |
|                          | e. <b>ITV1 should show more serious documentaries and current affairs at peak times (between 6pm-10.30pm)</b>            | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (53) |
|                          | f. <b>It is important for ITV1 to show a high proportion of programmes that reflect life in the UK</b>                   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (54) |
| <input type="checkbox"/> | g. <b>It is important for ITV1 to show programmes that are made in a variety of different parts of the UK</b>            | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (55) |
|                          | h. <b>ITV1's website is a useful source of information about my local area and region</b>                                | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (56) |

Q25

SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Channel 4? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-K AND ROTATE ORDER, TICK START

|                          |  | Agree<br>strongl<br>y | Agre<br>e | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-----------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Channel 4 does a good job of catering for audiences that other channels don't cater for   | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (57) |
|                          | b. Channel 4 is noticeably more innovative and risk-taking in its programmes than the other main TV channels   | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (58) |
|                          | c. Channel 4 should be challenging orthodox views and standards even if this means offending some people   | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (59) |
|                          | d. It is important for Channel 4 to show a high proportion of programmes that reflect life in the UK   | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (60) |
|                          | e. Channel 4 takes a different approach to subjects as compared to other channels  | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (61) |
| <input type="checkbox"/> | f. Channel 4 should show children's programmes that reflect life in the UK   | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (62) |
|                          | g. Channel 4 should show programmes for teenagers that reflect life in the UK  | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (63) |
|                          | h. It is important for Channel 4 to show programmes that get people interested in learning more  | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (64) |
|                          | i. It is important for Channel 4 to show programmes for schools  | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (65) |
|                          | j. It is important for Channel 4 to show programmes that reflect the needs of and concerns of different communities within the UK (for example, ethnic minority communities) | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (66) |
| <input type="checkbox"/> | k. Channel 4's digital channels, such as E4, More 4 and Film4 aren't important – Channel 4 should just focus on its main channel   | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (67) |

Q27 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Five (which used to be called Channel Five)? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-E AND ROTATE ORDER – TICK START

|                             |   | Agree<br>strongly | Agree | Neither<br>agree<br>nor<br>dis-<br>agree | Disagree | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|---|-------------------|-------|--|----------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | It is important for Five to show dramas that reflect life in the UK   | 1                 | 2     | 3  | 4        | 5                         | 6             | (11) |
| b.                          | It is important for Five to show a high proportion of programmes that reflect life in the UK                  | 1                 | 2     | 3  | 4        | 5                         | 6             | (12) |
| c.                          | It is important for Five to show children's programmes that reflect life in the UK                            | 1                 | 2     | 3  | 4        | 5                         | 6             | (13) |
| <input type="checkbox"/> d. | It is important for Five to show news programmes  | 1                 | 2     | 3  | 4        | 5                         | 6             | (14) |
| e.                          | Five's digital channels (Five US and Five Life) aren't important – Five should just focus on its main channel | 1                 | 2     | 3  | 4        | 5                         | 6             | (15) |

Q28 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Teletext (that is, the text pages on ITV1 and Channel 4, not text services on other channels such as Ceefax on the BBC)? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND ROTATE ORDER, TICK START

|                             |  | Agree<br>strongly | Agree | Neither<br>agree<br>nor<br>dis-<br>agree | Disagree | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|--|-------------------|-------|--|----------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | It is important for Teletext to provide news   | 1                 | 2     | 3  | 4        | 5                         | 6             | (16) |
| b.                          | It is important for Teletext to provide current affairs  | 1                 | 2     | 3  | 4        | 5                         | 6             | (17) |
| <input type="checkbox"/> c. | It is important for Teletext to provide news about and made for people in my region            | 1                 | 2     | 3  | 4        | 5                         | 6             | (18) |
| d.                          | It is important for Teletext to provide current affairs about and made for people in my region | 1                 | 2     | 3  | 4        | 5                         | 6             | (19) |

## GENERAL VIEWS ABOUT PROGRAMME TYPES

Thank you for all your opinions so far about the quality of television. In this section of the questionnaire, we would like to ask your views about different types of programmes that are shown on television.

Q29 SHOWCARD N (R) From the following list, which are the five programme types you consider to be most valuable to you and your family personally on the main TV channels? You can pick up to five that are most important to you. CODE UP TO 5 ONLY

Q30 SHOWCARD N (R) AGAIN The previous question asked you which programme types were important to you personally. Now I would like you to think about how important these programmes are for the good of society as a whole. For example, you may personally think soaps are not important, but could still think they are important to society as a useful way of airing debates about current issues. So looking at the same list of programme types, please tell me which five you think are the most important for the main TV channels to provide for the good of society as whole. Again, you can pick up to five that you think are the most important. CODE UP TO 5 ONLY

Q31 SHOWCARD N (R) AGAIN Now thinking about programmes that are made in the UK. For which of the following do you think it is most important to be made in this country and reflect life here? Again, you can pick up to five that you think are the most important. CODE UP TO 5 ONLY

|   |  | Q29<br>(20) | Q30<br>(22) | Q31<br>(24) |
|---|--|-------------|-------------|-------------|
| A | News   | 1           | 1           | 1           |
| B | Current Affairs programme such as<br>Tonight with Trevor McDonald and<br>Panorama  | 2           | 2           | 2           |
| C | Arts and classical music   | 3           | 3           | 3           |
| D | Children's   | 4           | 4           | 4           |
| E | Religious  | 5           | 5           | 5           |
| F | Serious Factual, including history,<br>nature or science programmes  | 6           | 6           | 6           |
| G | Other factual programmes including<br>hobbies, leisure and consumer<br>affairs e.g. Masterchef, Traffic<br>Cops, and The Gadget Show | 7           | 7           | 7           |
| H | Programmes of an educational<br>nature   | 8           | 8           | 8           |
| I | Soaps  | 9           | 9           | 9           |
| J | Drama  | 0           | 0           | 0           |
| K | Films  | X           | X           | X           |
| L | Sport  | Y           | Y           | Y           |
|   |  | (21)        | (23)        | (25)        |
| M | Entertainment and contemporary<br>music e.g My Family, Strictly Come<br>Dancing and X Factor   | 1           | 1           | 1           |
| N | Comedy   | 2           | 2           | 2           |
| O | <b>1.1.1.2 News about my region</b>  | 3           | 3           | 3           |
| P | Current affairs about my region  | 4           | 4           | 4           |
| Q | Aside from news and current<br>affairs, other programmes about my<br>region  | 5           | 5           | 5           |
|   | Other (please write in and code 6)   | 6           |             |             |
|   |  |             | 6           |             |
|   |  |             |             | 6           |
|   | None of these  | 7           | 7           | 7           |
|   | Don't know   | 8           | 8           | 8           |

(20-25)



|  |
|--|
| DETAILED VIEWS TOWARDS GENRES ON INDIVIDUAL CHANNELS |
|--|

Q32 SHOWCARD O (R) I'd now like you to think about the types of programmes that TV channels provide. Some people think that there should be rules to make TV channels provide certain types of programmes, such as news, children's programmes, religious programmes, and regional programmes. Other people say that it should be left for TV channels to decide what to show. Which of these statements is closest to your own views overall? SINGLE CODE ONLY

|   |   |   |
|---|---|---|
| A | There should be rules to make <u>all</u> TV channels (that is the main TV channels and digital channels) provide certain types of programmes such as news, children's programmes, religious programmes and programmes about my region     | 1 |
| B | There should be rules to make <u>the main</u> TV channels (ie BBC One, BBC Two, ITV1, Channel Four and Five) provide certain types of programmes such as news, children's programmes, religious programmes and programmes about my region | 2 |
| C | There should be rules just to make the <u>BBC</u> provide certain types of programmes such as news, children's programmes, religious programmes and programmes about my region  | 3 |
| D | All TV channels should be free to decide for themselves what types of programmes they broadcast   | 4 |
|   | Don't know  | 5 |

(26)

INTERVIEWER: FOR Q33-35, READ OUT EACH QUESTION IN TURN FOR EACH GENRE – EG READ OUT Q33 FOR NEWS, Q34 FOR NEWS, Q35 FOR NEWS, THEN Q33 FOR CURRENT AFFAIRS, Q34 FOR CURRENT AFFAIRS, Q35 FOR CURRENT AFFAIRS, AND SO ON. ROTATE THE ORDER IN WHICH YOU ASK ABOUT EACH GENRE – IE DO NOT START WITH NEWS EACH TIME – AND TICK START. THE RESPONDENT SHOULD KEEP HOLD OF SHOWCARD P (R) THROUGHOUT THIS SECTION.

- Q33 SHOWCARD P (R) **The earlier questions asked you about the types of programmes you thought were important to you personally and for the good of society as a whole. Still thinking about the good of society, I now want you to think about how important it is that the main TV channels as a whole provide certain types of programme. So, for [READ OUT PROGRAMME TYPE], how important, if at all, do you think it is that these programmes are shown on the main TV channels as a whole?**  
SINGLE CODE ONLY
- Q34 SHOWCARD P (R) AGAIN **And how important, if at all, do you think it is that [READ OUT PROGRAMME TYPE] is shown on more than one of the main TV channels?**  
SINGLE CODE ONLY
- Q35 **And still thinking about [READ OUT PROGRAMME TYPE], please tell me whether you think there should be more, less or about the same amount of these types of programmes shown on the main TV channels than there is now?** SINGLE CODE ONLY

REPEAT Q33-35 FOR EACH PROGRAMME TYPE A-P BELOW

**A News**

|   | Very<br>import<br>ant | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (27) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (28) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (29) |

**B Current affairs**

|   | Very<br>import<br>ant | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (30) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (31) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (32) |

|   |                       |                        |                               |                          |                         |               |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| <b>C      News about your region</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (33) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?             | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (34) |
| Q35 More, less or about the same amount on the main TV channels?                      | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (35) |
| <b>D      Current affairs about your region</b>                                       |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (36) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?             | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (37) |
| Q35 More, less or about the same amount on the main TV channels?                      | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (38) |
| <b>E      Aside from news and current affairs, other programmes about your region</b> |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (39) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?             | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (40) |
| Q35 More, less or about the same amount on the main TV channels?                      | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (41) |
| <b>F      Programmes that are made in the UK and reflect life in the UK</b>           |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (42) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?             | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (43) |
| Q35 More, less or about the same amount on the main TV channels?                      | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (44) |

|   |                       |                        |                               |                          |                         |               |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| <b>G</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Programmes that take place in different parts of the UK</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (45) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (46) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (47) |
| <b>H</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Children's programmes that reflect life in the UK</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (48) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (49) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (50) |
| <b>I</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Serious factual programmes for example, about nature, arts, science or history that are made in the UK</b> |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (51) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (52) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (53) |
| <b>J</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Dramas that reflect life in the UK</b>   |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (54) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (55) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (56) |

|        |  |                       |                        |                          |                          |                         |               |
|--------|--|-----------------------|------------------------|--------------------------|--------------------------|-------------------------|---------------|
| K<br>□ | <b>Comedies and sitcoms that are made in the UK</b>                                      |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (57)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (58)        |
| L      |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (59)          |
|        |  |                       |                        |                          |                          |                         |               |
|        | <b>Programmes that get people interested in learning more about different topics</b>     |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (60)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (61)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
| M      | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (62)          |
|        |  |                       |                        |                          |                          |                         |               |
|        | <b>Religious programmes that are made in the UK</b>                                      |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (63)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (64)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (65)          |
| N      | <b>Programmes that appeal to a wide range of different cultural tastes and interests</b> |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (66)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (67)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (68)          |
|        |  |                       |                        |                          |                          |                         |               |
|        |  |                       |                        |                          |                          |                         |               |

|        |    |
|--------|----|
| CARD 5 | 10 |
|--------|----|

|          |       |
|----------|-------|
| SKIP COL | 11-13 |
|----------|-------|

☐ **Programmes that include people from different ethnic minority groups**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (14) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (15) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (16) |

☐ **Additional digital channels like BBC Three, E4, Five Life and ITV2**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| INTERVIEWER READ OUT<br>QUESTION WORDING AS SLIGHTLY<br>DIFFERENT                               |                       |                        |                               |                          |                         |               |      |
| Q31 Important that provided by the main television broadcasters?                                | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (17) |
| Q34 Important that <u>more than one</u> of the main television broadcasters provides them?      | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (18) |
| Q35 More, less or about the same amount provided by the main TV broadcasters than there is now? | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (19) |

Q36 SHOWCARD P (R) AGAIN **How important, if at all, is it that the main television channels as a whole provide...**

|    |   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|----|---|-----------------------|------------------------|------------------|--------------------------|-------------------------|---------------|------|
| a. | <b>Websites that provide additional content about different topics including news and entertainment</b> | 1                     | 2                      | 3                | 4                        | 5                       | 6             | (20) |
| b. | <b>Websites that allow you to watch TV programmes when you want to watch them</b>                       | 1                     | 2                      | 3                | 4                        | 5                       | 6             | (21) |

**I'd now like you to think about news and current affairs on the main TV channels as well as digital channels and the internet.**

Q37 SHOWCARD Q (R) **To what extent do you agree or disagree with each of the following statements about news?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-C AND ROTATE ORDER – TICK START

|                             |   | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | <b>It is important for each of the main TV channels to have at least one news programme during peak viewing hours (6pm-10.30pm)</b>     | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (22) |
| b.                          | <b>Now that there are dedicated digital news channels available, there is less of a need for news bulletins on the main TV channels</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (23) |
| <input type="checkbox"/> c. | <b>The internet is a better source of news than the main TV channels</b>  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (24) |

Q38 SHOWCARD Q (R) AGAIN **To what extent do you agree or disagree with each of the following statements on information about current affairs programmes such as Tonight with Trevor McDonald and Panorama?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND REVERSE ORDER – TICK START

|                             |  | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | <b>The main TV channels shouldn't be made to show current affairs programmes, there's plenty of choice on the digital channels</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (25) |
| <input type="checkbox"/> b. | <b>The internet is a better source of information about current affairs than the main TV channels</b>                              | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (26) |

I'd now like you to think about news about this region

Q39 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about news about your region? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Television is an important source of news about my region  | 1                     | 2     | 3  | 4            | 5                         | 6             | (27) |
|                          | b. It is important for ITV1 as well as the BBC to show news programmes about my region  | 1                     | 2     | 3  | 4            | 5                         | 6             | (28) |
| <input type="checkbox"/> | c. News about my region is of a generally high standard   | 1                     | 2     | 3  | 4            | 5                         | 6             | (29) |
|                          | d. The main TV channels shouldn't be made to show news programmes about my region, there's plenty of news on the internet about my region | 1                     | 2     | 3  | 4            | 5                         | 6             | (30) |

Q40 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about programmes about your region aside from news and current affairs? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS (A-F) AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Other than the news and current affairs, programmes about my region are of no interest to me | 1                     | 2     | 3  | 4            | 5                         | 6             | (31) |
|                          | b. It is important to show programmes that take place in different parts of the UK              | 1                     | 2     | 3  | 4            | 5                         | 6             | (32) |
| <input type="checkbox"/> | c. Broadcasters shouldn't be made to show set amounts of programmes about my region             | 1                     | 2     | 3  | 4            | 5                         | 6             | (33) |
|                          | ASK ONLY IN NORTHERN IRELAND  |                       |       |  |              |                           |               | (34) |
|                          |   |                       |       |  |              |                           |               | (35) |
|                          | f. ASK ONLY IN SCOTLAND/  |                       |       |  |              |                           |               | (36) |
|                          | g. ASK ONLY IN WALES  |                       |       |  |              |                           |               | (37) |



ASK ALL

I'd now like to you to think about how you find out information about your local area.

Q41 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about information about your local area? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A AND B AND REVERSE ORDER – TICK BOX START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a | 1                     | 2     | 3  | 4            | 5                         | 6             | (38) |
|                          |   |                       |       |  |              |                           |               |      |
| <input type="checkbox"/> | b | 1                     | 2     | 3  | 4            | 5                         | 6             | (39) |
|                          |   |                       |       |  |              |                           |               |      |

I'd now like you to think about children's programmes on television.

Q42 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree the following statements about children's programmes on television? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS AND REVERSE ORDER – TICK BOX START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a | 1                     | 2     | 3  | 4            | 5                         | 6             | (40) |
|                          |   |                       |       |  |              |                           |               |      |
|                          | b | 1                     | 2     | 3  | 4            | 5                         | 6             | (41) |
|                          |   |                       |       |  |              |                           |               |      |
|                          | c | 1                     | 2     | 3  | 4            | 5                         | 6             | (42) |
|                          |   |                       |       |  |              |                           |               |      |
| <input type="checkbox"/> | d | 1                     | 2     | 3  | 4            | 5                         | 6             | (43) |
|                          |   |                       |       |  |              |                           |               |      |

Q43

SHOWCARD R (R) In the future, it may be the case that the main TV channels may not be able to provide all of the types of content that we have been talking about. For each of the content types that I'm about to read out, please can you tell me which of these statements is closest to your views? If you agree with statements B, C, and D please say so. CAN MULTICODE B, C AND D (DIGITAL CHANNELS AND INTERNET) OTHERWISE SINGLE CODE. READ OUT STATEMENTS A-M AND ROTATE ORDER – TICK BOX START

|                          |   | A) This needs to be shown on the main TV channels | B) This doesn't need to be shown on the main TV channels so long as people can get it on digital channels provided by the main TV broadcasters (e.g. BBC Three, E4, Five Life, ITV2.) | C) This doesn't need to be shown on the main TV channels as the other digital channels provide this type of content (e.g. Sky One, Sky News, Living, Sky Sports, Sky Movies) | D) This doesn't need to be shown on the main TV channels so long as people can get this type of content on the internet | Don't know |      |
|--------------------------|---|---|---|--|---|------------|------|
| <input type="checkbox"/> | a. News   | 1   | 2   | 3  | 4   | 5          | (44) |
|                          | b. Current affairs  | 1   | 2   | 3  | 4   | 5          | (45) |
|                          | c. News and information about your region   | 1   | 2   | 3  | 4   | 5          | (46) |
|                          | d. News and information about your local area   | 1   | 2   | 3  | 4   | 5          | (47) |
|                          | e. Children's programmes that reflect life in the UK  | 1   | 2   | 3  | 4   | 5          | (48) |
| <input type="checkbox"/> | f. Serious factual programmes (for example, about nature, science or history)                   | 1   | 2   | 3  | 4   | 5          | (49) |
|                          | g. Drama that reflects life in the UK   | 1   | 2   | 3  | 4   | 5          | (50) |
|                          | h. Programmes for schools (for example, BBC Learning Zone and Channel 4 Programmes for Schools) | 1   | 2   | 3  | 4   | 5          | (51) |
|                          | i. Entertainment  | 1   | 2   | 3  | 4   | 5          | (52) |
|                          | j. Sports   | 1   | 2   | 3  | 4   | 5          | (53) |
| <input type="checkbox"/> | k. Programmes that get people interested in learning about different topics                     | 1   | 2   | 3  | 4   | 5          | (54) |
|                          | l. Arts programmes made in the UK   | 1   | 2   | 3  | 4   | 5          | (55) |
|                          | m. Religious  | 1   | 2   | 3  | 4   | 5          | (56) |

| programmes<br>made in the UK   |  |                   |                     |                 |                            |                          |               | )        |
|--|--|-------------------|---------------------|-----------------|----------------------------|--------------------------|---------------|----------|
| Q44 SHOWCARD S (R) Finally, thinking about everything we have talked about today, how satisfied or dissatisfied are you with...? READ OUT A-D SINGLE CODE ONLY |  |                   |                     |                 |                            |                          |               |          |
|  |  | Very<br>satisfied | Fairly<br>satisfied | Neither<br>/nor | Fairly<br>dissatisfie<br>d | Very<br>dissatis<br>fied | Don't<br>know |          |
| a.   | The main TV channels   | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (57<br>) |
| b.   | The digital channels provided by the main TV broadcasters – BBC Three, E4, Five Life, ITV2 and so on | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (58<br>) |
| c.   | Other digital TV channels – eg Sky One, Sky News, Living, Sky Sports, Sky Movies and so on           | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (59<br>) |
| d.   | All the TV that is available to you as a whole   | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (60<br>) |

Thank you very much for your time – your views will make a difference to the future of television in the UK. I now just need to ask you some questions about yourself to help us analyse the results – PLEASE GO TO DEMOGRAPHICS

**THIS MUST BE THE LAST PAGE OF THE QUESTIONNAIRE AND MUST BE SINGLE SIDED**

Ipsos MORI/31644BB01  
1-5

Questionnaire No:

|           |    |
|-----------|----|
| Serial No |    |
| OUO (6-9) |    |
| CARD      | 10 |

**Ofcom PSB Survey – England (Version 1)**  
**Final Questionnaire**

Interviewer Number:

-       
(11) (12) (13) (14) (15) (16) (11-16)

Name/Initial/Title: Mr/Mrs/Ms/Miss

Address:

Full Postcode

QTEL1 **Do you have a fixed line telephone at home which you use for incoming and outgoing voice calls?**

|                       |   |             |
|-----------------------|---|-------------|
| Yes                   | 1 | GO TO QTEL2 |
| WRITE IN Full tel. No |   |             |
| No                    | 2 |             |
| Refused               | 3 |             |
| Ex-directory          | 4 |             |

QTEL2 **ASK IF NO FIXED LINE/REFUSED/EX-DIRECTORY (CODES 2-4). OTHERS CLOSE**  
**Can I just check, do you have a mobile phone? IF YES ASK: Can I take the number please?**

|                       |   |
|-----------------------|---|
| Yes                   | 1 |
| WRITE IN Full tel. No |   |
| No                    | 2 |
| Refused               | 3 |

**IT IS VERY IMPORTANT THAT YOU FILL IN THE SAMPLE POINT NUMBER, QUESTIONNAIRE NUMBER AND INTERVIEWER NUMBER ON BOTH THE FRONT AND BACK PAGE OF THE QUESTIONNAIRE.**

Please look on the intranet under documents/data protection for examples of agreement to re-contact respondents and consent forms

**Ofcom PSB Survey – Wales (Version 4)**  
**Final Questionnaire**

Sample Point Number:

Sample point name:

**SECTION A: DEMOGRAPHICS**

**Sampling Point Summary:**

**CABLE (SINGLE CODE)**

|                    |   |      |
|--------------------|---|------|
| Cable Coverage     | 1 |      |
| Non-Cable Coverage | 2 | (11) |

**URBAN/RURAL (SINGLE CODE)**

|                                |   |      |
|--------------------------------|---|------|
| Cities/large towns – urban- GB | 1 |      |
| Medium-size towns – urban- GB  | 2 |      |
| Small towns – urban- GB        | 3 |      |
| Rural - GB                     | 4 |      |
| Urban - NI                     | 5 |      |
| Rural - NI                     | 6 | (12) |

**DEPRIVATION (SINGLE CODE )**

|                    |   |      |
|--------------------|---|------|
| Low Deprivation    | 1 |      |
| Medium Deprivation | 2 |      |
| High Deprivation   | 3 | (13) |

**GEOGRAPHIC AREA (Government Region) (SINGLE CODE)**

|                    |   |      |
|--------------------|---|------|
| London             | 1 |      |
| South East         | 2 |      |
| South West         | 3 |      |
| East Midlands      | 4 |      |
| West Midlands      | 5 |      |
| North East         | 6 |      |
| North West         | 7 |      |
| East England       | 8 |      |
| Yorkshire & Humber | 9 |      |
| Scotland           | 0 |      |
| Wales              | X |      |
| Northern Ireland   | Y | (14) |

**QA Gender**

|        |   |      |
|--------|---|------|
| Male   | 1 |      |
| Female | 2 | (15) |

WRITE IN & CODE EXACT AGE

QB      **Exact**              
**Age**                      (16)      (17)

|  |       |   |      |
|--|-------|---|------|
|  | 16-17 | 1 |      |
|  | 18-24 | 2 |      |
|  | 25-34 | 3 |      |
|  | 35-44 | 4 |      |
|  | 45-54 | 5 |      |
|  | 55-64 | 6 |      |
|  | 65-74 | 7 |      |
|  | 75+   | 8 | (18) |

### Interviewer Declaration

I confirm that I have carried out this Interview face-to-face with the named person of the address attached and that I asked all the relevant questions fully and recorded the answers in conformance with the survey specification and within the MRS Code of Conduct and the Data Protection Act 1998.

Signature: .....

Interviewer Name (CAPS): .....

.....

Interviewer Number:

-                           
(19)    (20)    (21)    (22)    (23)    (24)      (19-24)

Day of Interview      1    2    3    4    5    6    7  
                                 (Mon)      (Thur)      (Sun)      (25)

Date of Interview:      /   /07      (26-

Length of Interview:   (minutes)      (30-

**QC Respondent is: SINGLE  
CODE**

|  |   |
|--|---|
| Working full-time (30hrs/wk+)  | 1 |
| Working part-time (8-29hrs/wk)   | 2 |
| Not working (i.e. under 8hrs/week-retired)   | 3 |
| Not working (i.e. under 8hrs/week) unemployed (registered/not registered but looking for work) | 4 |
| Not working (i.e. under 8hrs/week) student   | 5 |
| Not working (i.e. under 8hrs/week) housewife /disabled /other                                  | 6 |
| Don't know   | 7 |

(32)

**QD SHOWCARD T Which of the groups on this card, if any, would you say you belong to? SINGLE CODE ONLY**

|                                      |      |
|--------------------------------------|------|
| <b>WHITE</b>                         | (33) |
| British                              | 1    |
| Irish                                | 2    |
| Any other white background           | 3    |
| <b>MIXED</b>                         |      |
| White and Black Caribbean            | 4    |
| White and Black African              | 5    |
| White and Asian                      | 6    |
| Any other mixed background           | 7    |
| <b>ASIAN OR ASIAN BRITISH</b>        |      |
| Indian                               | 8    |
| Pakistani                            | 9    |
| Bangladeshi                          | 0    |
| Any other Asian background           | X    |
| <b>BLACK OR BLACK BRITISH</b>        |      |
| Caribbean                            | Y    |
|                                      | (34) |
| African                              | 1    |
| Any other black background           | 2    |
| <b>CHINESE OR OTHER ETHNIC GROUP</b> |      |
| Chinese                              | 3    |
| Any other background                 | 4    |
| Refused                              | 5    |

**QE Home is: SINGLE  
CODE**

|   |   |
|---|---|
| Being bought on mortgage                              | 1 |
| Owned outright by household                           | 2 |
| Rented from Local Authority/Housing Association/Trust | 3 |
| Rented from private landlord                          | 4 |
| Other   | 5 |
| Don't know  | 6 |

(35)

**QF Occupation of Chief Income Earner**

Position/rank/grade

Industry/type of company

Quals/degree/apprenticeship

Number of staff responsible for

REMEMBER TO PROBE FULLY AND CODE FROM ABOVE

**QG Class**

|    |   |
|----|---|
| A  | 1 |
| B  | 2 |
| C1 | 3 |
| C2 | 4 |
| D  | 5 |
| E  | 6 |

(36)

**QH Total number in household (including respondent and any children)**

(37)

**Number of children in household (Under 16)**

(38)

ASK IF HAVE AT LEAST ONE CHILD IN HH  
(UNDER 16)  
QI **How old is/are your child/ren?** MULTICODE  
OK

|            |      |
|------------|------|
|            | (39) |
| 1 or under | 1    |
| 2          | 2    |
| 3          | 3    |
| 4          | 4    |
| 5          | 5    |
| 6          | 6    |
| 7          | 7    |
| 8          | 8    |
| 8          | 9    |
| 10         | 0    |
| 11         | X    |
| 12         | Y    |
|            | (40) |
| 13         | 1    |
| 14         | 2    |
| 15         | 3    |

(39-40)

ASK ALL WITH CHILDREN UNDER 16 IN THE  
HOUSEHOLD

QJ **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 |

(41)

ASK ALL

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

|            |      |                           |
|------------|------|---------------------------|
|            | YOU  | OTHER<br>H/HOLD<br>MEMBER |
|            | (42) | (43)                      |
| Yes        | 1    | 1                         |
| No         | 2    | 2                         |
| Don't know | 3    | 3                         |

(42-43)

ASK ALL

QL **SHOWCARD U (R) Would you please  
tell me the letter from this card for  
the group in which you would place  
your total household income from  
all sources before tax and  
deductions.** REASSURE ABOUT  
CONFIDENTIALITY

|   |                   |      |  |
|---|-------------------|------|--|
|   |                   | (44) |  |
| B | Less than £11,500 | 1    |  |
| E | £11,500 - £17,499 | 2    |  |
| D | £17,500 - £29,999 | 3    |  |
| A | £30,000 - £49,999 | 4    |  |
| C | £50,000 and over  | 5    |  |
|   | Refused           | 6    |  |
|   | Don't know        | 7    |  |
|   |                   | (44) |  |

#### MOBILE PHONES

QM **Do you personally use a  
mobile phone** SINGLE CODE

|            |   |
|------------|---|
| Yes        | 1 |
| No         | 2 |
| Don't know | 3 |

(45)

#### LANGUAGE

QN **Do you speak or have an  
understanding of...** ONLY READ OUT C

|    |                   |          |
|----|-------------------|----------|
| a. | Irish             | 1        |
| b. | Ulster Scots      | 2        |
| c. | <b>Welsh</b>      | <b>3</b> |
| d. | Gaelic            | 4        |
|    | None of the above | 5        |
|    | Don't know        | 6        |

(46)

INTERVIEWER RECORD END TIME AFTER DEMOGRAPHICS

Hours Mins



INTERVIEWER RECORD START TIME

|                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Hours                |                      | Mins                 |                      |

### INTRODUCTION/CONFIDENTIALITY

Good morning, afternoon, evening. My name is ..... from Ipsos MORI, the research organisation, and we are carrying out a survey for Ofcom, the independent body set up by the Government to oversee broadcasting and telecommunications in the UK. We'd like you to answer some questions about television in the UK – what's good and bad about it, and which channels should show which type of programmes. This is your opportunity for you to help shape the future of television. The survey will take about 35 minutes. We also want to find out your views about the internet and other types of media (such as radio, newspapers etc).

Initially, we would like to ask you some broad questions about your attitudes towards television and the media in general.

**I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual or address in the results.**

### TELEVISION VIEWING

ASK ALL

Q18. **First of all, on an average day how many hours would you say you watch TV?** SINGLE CODE

|                     |   |
|---------------------|---|
| Up to about an hour | 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 |

(11)

Q19. SHOWCARD A (R) **Which, if any, of these types of television does your household receive at the moment?** MULTICODE OK

|   |   |   |          |
|---|---|---|----------|
| A | Only the main channels (BBC One, BBC Two, ITV1 Wales, Channel 4, Five and S4C)  | 1 | GO TO Q5 |
| B | Cable TV (through NTL / Telewest / Virgin Media)  | 2 | GO TO Q4 |
| C | Satellite TV (Sky)  | 3 | ASK Q3   |
| D | Satellite TV (Other)  | 4 |          |
| E | Freeview (through a set-top box or digital television set) with ONLY free channels  | 5 | GO TO Q4 |
| F | 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 |          |
| G | Digital TV via a broadband DSL line (from HomeChoice or Kingston Communications)  | 7 |          |
|   | Any other mention of Virgin   | 8 | GO TO Q5 |
|   | Other (please write in and code 9)  | 9 |          |
|   | No TV in household  | 0 | GO TO Q7 |
|   | Don't know  | X | GO TO Q5 |

(12)

Q20. ASK THOSE WITH SATELLITE TV (CODES 3-4 AT Q2)

**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 |
| Free-to-air services only (no monthly subscription fee)        | 2 |
| Don't know   | 3 |

(13)

Q21. ASK THOSE WITH MULTI-CHANNEL TV (CODES 2-8 AT Q2)

**Does your household have a device that has a hard disc and allows you to pause, rewind and record live TV programmes? These are sometimes known as Sky +, V+, Tivo or Telewest drive.** SINGLE CODE

|            |   |
|------------|---|
| Yes        | 1 |
| No         | 2 |
| Don't know | 3 |

(14)

ASK ALL WITH TV IN HOUSEHOLD

Q22. SHOWCARD B (R) **Which of these television channels and services, if any, would you say you watch regularly? That is, a few times a week.** MULTICODE OK

|   |                    |   |
|---|--------------------|---|
| A | BBC One            | 1 |
| B | BBC Two            | 2 |
| C | ITV1 Wales         | 3 |
| D | Channel 4          | 4 |
| E | Five               | 5 |
| F | Teletext or Ceefax | 6 |
| G | S4C                | 7 |
|   | None of them       | 8 |
|   | Don't know         | 9 |

(15)

Q23. SHOWCARD C (R) And which of the following types of programmes, if any, would you say you watch regularly on the main TV channels (that is BBC One, BBC Two, ITV1 Wales, Channel 4, Five and S4C)? MULTICODE OK

|   |   |      |
|---|---|------|
|   |   | (16) |
| A | News  | 1    |
| B | Current Affairs programmes such as Tonight with Trevor McDonald and Panorama  | 2    |
| C | Arts and classical music  | 3    |
| D | Children's  | 4    |
| E | Religious   | 5    |
| F | Serious Factual, including history, nature or science programmes  | 6    |
| G | Other factual programmes including hobbies, leisure and consumer affairs e.g. Masterchef, Traffic Cops, and The Gadget Show                     | 7    |
| H | Programmes of an educational nature   | 8    |
| I | Soaps   | 9    |
| J | Drama   | 0    |
| K | Films   | X    |
| L | Sport   | Y    |
|   |   | (17) |
| M | Entertainment and contemporary music e.g My Family, Strictly Come Dancing and X Factor  | 1    |
| N | Comedy  | 2    |
| O | <b>1.1.1.3 News about and made for people in Wales</b>  | 3    |
| P | Current affairs about and made for people in Wales e.g. Wales This Week and Week in Week Out  | 4    |
| Q | Aside from news and current affairs, other programmes about and made for people in Wales e.g. The Ferret, Iolo's Welsh Safari and Soccer Sunday | 5    |
|   | Other   | 0    |
|   | None of these   | X    |
|   | Don't know  | Y    |

(16-17)

# INTERNET USAGE

I would now like to ask you about the internet.

Q24. ASK ALL

**Do you personally use the internet?** SINGLE CODE

|            |   |           |
|------------|---|-----------|
| Yes        | 1 | ASK Q8    |
| No         | 2 | GO TO Q11 |
| Don't know | 3 |           |

(18)

Q25. ASK THOSE WITH INTERNET ACCESS (CODE 1 AT Q7)

**Where do you access the internet?** MULTICODE OK

|  |   |           |
|--|---|-----------|
| At home  | 1 | ASK Q9    |
| At work (out of home)  | 2 | GO TO Q10 |
| At a public place (internet café,<br>library, by mobile phone, etc.) | 3 |           |
| At university / college  | 4 |           |
| At school  | 5 |           |
| Elsewhere (friends, relatives,<br>etc.)                              | 6 |           |
| Other  | 7 |           |
| Don't know   | 8 |           |

(19)

Q26. ASK THOSE WITH INTERNET ACCESS AT HOME (CODE 1 AT Q8)

**SHOWCARD D (R) And which of these methods does your household use to connect to the Internet at home? Just read out the letter or letters that apply.** MULTICODE OK

|   |   |   |
|---|---|---|
| A | Ordinary phone line – dial-up<br>access   | 1 |
| B | Broadband - high-speed access,<br>allowing you to make telephone<br>calls at the same time as using<br>the internet | 2 |
| C | Wireless access through a<br>wireless router, WIFI or portable<br>device  | 3 |
|   | Other (please write in and code<br>4)   | 4 |
|   | Don't know  | 5 |

(20)

Q27. ASK THOSE WITH ANY INTERNET ACCESS (CODE 1 AT Q7)

**How often do you tend to use the internet?** SINGLE CODE ONLY

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

(21)

# CROSS-PLATFORM PREFERENCES FOR DIFFERENT TYPES OF CONTENT

ASK ALL

Throughout this questionnaire, I am going to be asking you questions about the main TV channels. When I ask you about these, I am talking about the six main TV channels – BBC One, BBC Two, ITV1 Wales, Channel 4, Five and S4C.

READ OUT a-e AND ROTATE ORDER LIST. TICK START.

Q28. SHOWCARD E (R) Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? MULTICODE OK

Q29. And which of these different media would you say is your main source for...? SINGLE CODE  
INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS.

|            |  | a.<br>Entertainment              |                                  | b.<br>News about<br>the UK       |                                  | c.<br>News about<br>the world    |                                  | d.<br>News about and<br>made for people in<br>Wales |                                  | e.<br>News about<br>your local<br>area |                                  |
|------------|--|----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|---|----------------------------------|--|----------------------------------|
|            |  | ALL                              | MAIN                             | ALL                              | MAIN                             | ALL                              | MAIN                             | ALL   | MAIN                             | ALL                                    | MAIN                             |
| TICK START |  | <input type="checkbox"/><br>(22) | <input type="checkbox"/><br>(24) | <input type="checkbox"/><br>(26) | <input type="checkbox"/><br>(28) | <input type="checkbox"/><br>(30) | <input type="checkbox"/><br>(32) | <input type="checkbox"/><br>(34)                    | <input type="checkbox"/><br>(36) | <input type="checkbox"/><br>(38)       | <input type="checkbox"/><br>(40) |
| A          | TV on the main channels  | 1                                | 1                                | 1                                | 1                                | 1                                | 1                                | 1   | 1                                | 1                                      | 1                                |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2                                | 2                                | 2                                | 2                                | 2                                | 2                                | 2   | 2                                | 2                                      | 2                                |
| C          | Radio  | 3                                | 3                                | 3                                | 3                                | 3                                | 3                                | 3   | 3                                | 3                                      | 3                                |
| D          | Newspapers   | 4                                | 4                                | 4                                | 4                                | 4                                | 4                                | 4   | 4                                | 4                                      | 4                                |
| E          | Magazines  | 5                                | 5                                | 5                                | 5                                | 5                                | 5                                | 5   | 5                                | 5                                      | 5                                |
| F          | Books  | 6                                | 6                                | 6                                | 6                                | 6                                | 6                                | 6   | 6                                | 6                                      | 6                                |
| G          | Internet via pc or laptop  | 7                                | 7                                | 7                                | 7                                | 7                                | 7                                | 7   | 7                                | 7                                      | 7                                |
| H          | Teletext or Ceefax   | 8                                | 8                                | 8                                | 8                                | 8                                | 8                                | 8   | 8                                | 8                                      | 8                                |
| I          | Videos/DVDs  | 9                                | 9                                | 9                                | 9                                | 9                                | 9                                | 9   | 9                                | 9                                      | 9                                |
| J          | Computer games/<br>games console                                       | 0                                | 0                                | 0                                | 0                                | 0                                | 0                                | 0   | 0                                | 0                                      | 0                                |
|            | Other  | X                                | X                                | X                                | X                                | X                                | X                                | X   | X                                | X                                      | X                                |
|            | I'm not interested in this   | Y                                | Y                                | Y                                | Y                                | Y                                | Y                                | Y   | Y                                | Y                                      | Y                                |
|            |  | (23)                             | (25)                             | (27)                             | (29)                             | (31)                             | (33)                             | (35)  | (37)                             | (39)                                   | (41)                             |
|            | None   | 1                                | 1                                | 1                                | 1                                | 1                                | 1                                | 1   | 1                                | 1                                      | 1                                |
|            | Don't know   | 2                                | 2                                | 2                                | 2                                | 2                                | 2                                | 2   | 2                                | 2                                      | 2                                |

22-41)

- Q11 READ OUT f-i AND ROTATE ORDER LIST. TICK START.  
SHOWCARD E (R) AGAIN Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for each of the following categories? MULTICODE OK
- Q12 And which of these different media would you say is your main source for...?  
INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS. SINGLE CODE

|            |  | f.<br>Your<br>personal<br>interests<br>and<br>pastimes |      | g.<br>Knowledge<br>about<br>topics such<br>as arts,<br>science<br>nature or<br>history |      | h<br>Sports news<br>and<br>information |      | i<br>Finding out<br>about people<br>with <u>similar</u><br>interests to<br>your own |      |
|------------|--|--|------|--|------|--|------|---|------|
|            |  | ALL  | MAIN | ALL  | MAIN | ALL                                    | MAIN | ALL   | MAIN |
| TICK START |  | <input type="checkbox"/>                               |      |  |      | <input type="checkbox"/>               |      |   |      |
|            |  | (42)   | (44) | (46)   | (48) | (50)                                   | (52) | (54)  | (56) |
| A          | TV on the main channels  | 1  | 1    | 1  | 1    | 1                                      | 1    | 1   | 1    |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2  | 2    | 2  | 2    | 2                                      | 2    | 2   | 2    |
| C          | Radio  | 3  | 3    | 3  | 3    | 3                                      | 3    | 3   | 3    |
| D          | Newspapers   | 4  | 4    | 4  | 4    | 4                                      | 4    | 4   | 4    |
| E          | Magazines  | 5  | 5    | 5  | 5    | 5                                      | 5    | 5   | 5    |
| F          | Books  | 6  | 6    | 6  | 6    | 6                                      | 6    | 6   | 6    |
| G          | Internet via pc or laptop  | 7  | 7    | 7  | 7    | 7                                      | 7    | 7   | 7    |
| H          | Teletext or Ceefax   | 8  | 8    | 8  | 8    | 8                                      | 8    | 8   | 8    |
| I          | Videos/DVDs  | 9  | 9    | 9  | 9    | 9                                      | 9    | 9   | 9    |
| J          | Computer games/games console   | 0  | 0    | 0  | 0    | 0                                      | 0    | 0   | 0    |
|            | Other  | X  | X    | X  | X    | X                                      | X    | X   | X    |
|            | I'm not interested in this   | Y  | Y    | Y  | Y    | Y                                      | Y    | Y   | Y    |
|            |  | (43)   | (45) | (47)   | (49) | (51)                                   | (53) | (55)  | (57) |
|            | None   | 1  | 1    | 1  | 1    | 1                                      | 1    | 1   | 1    |
|            | Don't know   | 2  | 2    | 2  | 2    | 2                                      | 2    | 2   | 2    |

42-57)

- READ OUT j-k AND ROTATE ORDER LIST. TICK START.
- Q11 SHOWCARD E (R) AGAIN Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for each of the following categories? MULTICODE OK
- Q12 And which of these different media would you say is your main source for...?INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS. SINGLE CODE

|            |  | j<br>Finding about<br>people with<br>values and<br>lifestyles that<br>are <u>different</u><br>to your own |              | k<br>Discovering<br>new things |              |
|------------|--|---|--------------|--------------------------------|--------------|
|            |  | ALL<br>□<br>(58)  | MAIN<br>(60) | ALL<br>(62)                    | MAIN<br>(64) |
| TICK START |  |   |              |                                |              |
| A          | TV on the main channels  | 1   | 1            | 1                              | 1            |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2   | 2            | 2                              | 2            |
| C          | Radio  | 3   | 3            | 3                              | 3            |
| D          | Newspapers   | 4   | 4            | 4                              | 4            |
| E          | Magazines  | 5   | 5            | 5                              | 5            |
| F          | Books  | 6   | 6            | 6                              | 7            |
| G          | Internet via pc or laptop  | 7   | 7            | 7                              | 7            |
| H          | Teletext or Ceefax   | 8   | 8            | 8                              | 8            |
| I          | Videos/DVDs  | 9   | 9            | 9                              | 9            |
| J          | Computer games/games console   | 0   | 0            | 0                              | 0            |
|            | Other  | X   | X            | X                              | X            |
|            | I'm not interested in this   | Y   | Y            | Y                              | Y            |
|            |  | (59)  | (61)         | (63)                           | (65)         |
|            | None   | 1   | 1            | 1                              | 1            |
|            | Don't know   | 2   | 2            | 2                              | 2            |
|            |  |   |              |                                | (58-65)      |
|            |  |   |              |                                | CARD 3       |
|            |  |   |              |                                | 10           |

- Q30. SHOWCARD E (R) AGAIN And looking at this list again, which one of these, if any, do you think you would find it hardest to live without? SINGLE CODE ONLY

|   |  |      |
|---|--|------|
|   |  | (11) |
| A | TV on the main channels  | 1    |
| B | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2    |
| C | Radio  | 3    |
| D | Newspapers   | 4    |
| E | Magazines  | 5    |
| F | Books  | 7    |
| G | Internet via pc or laptop  | 8    |
| H | Teletext or Ceefax   | 9    |
| I | Videos/DVDs  | 0    |
| J | Computer games / games console   | X    |
|   | Other  | Y    |
|   |  | (12) |
|   | None   | 1    |

|            |   |         |
|------------|---|---------|
| Don't know | 2 | (11-12) |
|------------|---|---------|



Q31. SHOWCARD F (R) **To what extent do you agree or disagree with each of the following statements about television?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-J AND ROTATE ORDER. TICK START

|                          |   | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--------------------------|---|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
| <input type="checkbox"/> | a. <b>As well as entertaining and informing people, television has an important social role to play</b>                                       | 1                     | 2     | 3  | 4             | 5                             | 6                 | (13) |
|                          | b. <b>Television should help to promote understanding and tolerance of different religions, cultures and lifestyles</b>                       | 1                     | 2     | 3  | 4             | 5                             | 6                 | (14) |
|                          | c. <b>Television's main role should be to provide entertainment rather than information or education</b>                                      | 1                     | 2     | 3  | 4             | 5                             | 6                 | (15) |
|                          | d. <b>I have personally learned useful things from watching television</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (16) |
|                          | e. <b>Television is very influential in shaping public opinion about political and other important issues</b>                                 | 1                     | 2     | 3  | 4             | 5                             | 6                 | (17) |
| <input type="checkbox"/> | f. <b>Television has an important role to play in making people interested in different subjects, like arts, nature, sciences and history</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (18) |
|                          | g. <b>It is important that television is available to everyone</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (19) |
|                          | h. <b>Television has an important role in helping children and teenagers understand life in the UK</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (20) |
| <input type="checkbox"/> | i. <b>With so many channels now available, it's hard to find what I want</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (21) |
|                          | j. <b>TV programmes sometimes change the way I think about things</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (22) |

Q32. SHOWCARD F (R) AGAIN **And to what extent do you agree or disagree with each of the following statements about the internet?** SINGLE CODE ONLY FOR EACH LINE.  
READ OUT STATEMENTS (A-I) AND (J-L) AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--------------------------|---|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
| <input type="checkbox"/> | a. <b>As well as entertaining and informing people, the internet has an important social role to play</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (23) |
|                          | b. <b>The internet should help to promote understanding and tolerance of different religions, cultures and lifestyles</b>                         | 1                     | 2     | 3  | 4             | 5                             | 6                 | (24) |
|                          | c. <b>The internet's main role should be to provide entertainment rather than information or education</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (25) |
| <input type="checkbox"/> | d. <b>The internet is very influential in shaping public opinion about political and other important issues</b>                                   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (26) |
|                          | e. <b>The internet is a valuable source of information and learning</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (27) |
|                          | f. <b>The internet has an important role to play in making people interested in different subjects like the arts, nature, science and history</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (28) |
| <input type="checkbox"/> | g. <b>The internet has an important role to play in helping children and teenagers understand life in the UK</b>                                  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (29) |
|                          | h. <b>The internet is a valuable source of information and entertainment for children and teenagers</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (30) |
|                          | i. <b>It's important that the internet is available to everyone</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (31) |

ASK J-L OF THOSE WITH INTERNET ACCESS. CODE 1 AT Q7.

|  |  | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--|--|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
|  | j. <b>With so many websites on the internet, it's hard to find what I want</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (32) |
|  | k. <b>I have personally learned useful things from the internet</b>            | 1                     | 2     | 3  | 4             | 5                             | 6                 | (33) |
|  | l. <b>Websites sometimes change the way I think about things</b>               | 1                     | 2     | 3  | 4             | 5                             | 6                 | (34) |

Q33. ASK ALL **Thinking about the main TV channels, that is BBC One, BBC Two, ITV1 Wales, Channel 4, Five and S4C, would you say you are watching them more, less, or about the same as you were 4-5 years ago?** SINGLE CODE ONLY

|                |   |           |
|----------------|---|-----------|
| More           | 1 | GO TO Q18 |
| About the same | 2 |           |
| Less           | 3 | ASK Q17   |
| Don't know     | 4 | GO TO Q18 |

(35)

Q34. ASK THOSE WHO SAY THEY WATCH LESS TV. CODE 3 AT Q16. OTHERS GO TO Q18  
SHOWCARD G (R) **Could you say why it is you are watching them less than 4-5 years ago?** MULTICODE OK

|   |   |   |
|---|---|---|
| A | I am less interested in watching TV generally now   | 1 |
| B | I have less time to watch TV generally now because I am too busy or have had a change in my circumstances | 2 |
| C | I watch more of the main TV channels' digital channels instead – e.g. BBC Three, E4, Five Life, ITV2      | 3 |
| D | I watch more of other digital channels instead – e.g. Sky One, Sky News, Living, Sky Sports, Sky Movies   | 4 |
| E | I use the internet more instead of watching TV  | 5 |
| F | I play computer games more instead of watching TV   | 6 |
| G | I don't find the programmes as enjoyable/interesting as I used to do                                      | 7 |
| H | There are fewer programmes that appeal to my interests  | 8 |
|   | Other (please write in and code 9)  | 9 |
|   | Don't know  | 0 |

(36)

## HARD CHOICES: CONTENT PRIORITIES

Different people have different expectations – some people want to see more soaps and reality TV shows while others want more news and documentaries.

Q18. SHOWCARD H (R) I am now going to read out to you a number of different choices relating to the main television channels, BBC One, BBC Two, ITV1 Wales, Channel 4, Five and S4C. For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see... READ OUT STATEMENTS A AND B – SINGLE CODE

|   |   |   |
|---|---|---|
| A | <b>A wide variety of different programme types, for example news, sports, documentaries, entertainment, religious, and the arts</b> | 1 |
| B | <b>More of the popular entertainment programmes that most people want to watch</b>  | 2 |
|   | <b>No preference</b>  | 3 |
|   | Don't know  | 4 |

(37)

Q19. SHOWCARD I (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |   |   |
|---|---|---|
| A | <b>TV programmes that reflect the needs and concerns of different communities within the UK (religious, regional or national, and ethnic)</b> | 1 |
| B | <b>TV programmes that reflect the needs and concerns of the UK as a whole</b>   | 2 |
|   | <b>No preference</b>  | 3 |
|   | Don't know  | 4 |

(38)

Q20. SHOWCARD J (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |   |   |
|---|---|---|
| A | <b>The best TV programmes from the USA, Europe, Australia and other countries</b> | 1 |
| B | <b>A high proportion of programmes made in the UK</b>                             | 2 |
|   | <b>No preference</b>  | 3 |
|   | Don't know  | 4 |

(39)

Q21. SHOWCARD K (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |  |   |
|---|--|---|
| A | <b>Lots of original and experimental programme ideas</b> | 1 |
| B | <b>More of people's tried and tested favourites</b>      | 2 |
|   | <b>No preference</b>                                     | 3 |
|   | Don't know   | 4 |

(40)

Q22. SHOWCARD L (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |  |   |
|---|--|---|
| A | <b>The main channels should provide programmes that are targeted at mass audiences</b>                                       | 1 |
| B | <b>The main channels should provide a range of programmes that are targeted at a wide range of different audience groups</b> | 2 |
|   | <b>No preference</b>   | 3 |
|   | Don't know   | 4 |

(41)



|   |
|---|
| GENERAL VIEWS ABOUT PARTICULAR CHANNELS |
|---|

I'd now like to ask you some questions about specific TV channels – BBC, ITV, Channel 4 and Five.

Q23 SHOWCARD M (R) To what extent do you agree or disagree with each of the following statements about the BBC's television and internet services? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-F AND ROTATE ORDER. TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neither<br>agree<br>nor dis-<br>agree | Disagre<br>e | Disagree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|---------------------------------------|--------------|----------------------|---------------|------|
| <input type="checkbox"/> | a. The BBC should have a responsibility to set high standards  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (42) |
|                          | b. Given it receives public funding via the licence fee, the BBC should have special responsibilities to show programmes which commercial broadcasters don't | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (43) |
|                          | c. As licence fee payers, we are entitled to expect the BBC to provide more programmes that suit our tastes and interests than other broadcasters            | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (44) |
| <input type="checkbox"/> | d. It is important for the BBC to show a high proportion of programmes which reflect life in the UK  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (45) |
|                          | e. It's important for the BBC to keep up with new technology, for example, by allowing people to download its programmes onto their computers                | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (46) |
| <input type="checkbox"/> | f. The BBC's website is a useful source of information about my local area and region  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (47) |

|          |
|----------|
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|----------|

|    |
|----|
| 48 |
|----|

Q24 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about ITV1 Wales? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-H AND ROTATE ORDER. TICK START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. <b>ITV1 Wales should concentrate on popular entertainment programmes, drama and soaps, rather than try to do everything</b>                | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (49) |
|                          | b. <b>It is important for ITV1 Wales to show a range of programmes about and made for people in Wales aside from news and current affairs</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (50) |
|                          | c. <b>ITV1 Wales should be free to do whatever it feels it needs to do so that it can continue to attract a large audience</b>                | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (51) |
| <input type="checkbox"/> | d. <b>ITV1 Wales should show children's programmes that reflect life in the UK</b>  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (52) |
|                          | e. <b>ITV1 Wales should show more serious documentaries and current affairs at peak times (between 6pm-10.30pm)</b>                           | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (53) |
|                          | f. <b>It is important for ITV1 Wales to show a high proportion of programmes that reflect life in the UK</b>                                  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (54) |
| <input type="checkbox"/> | g. <b>It is important for ITV1 Wales to show programmes that are made in a variety of different parts of the UK</b>                           | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (55) |
|                          | h. <b>ITV1 Wales' website is a useful source of information about my local area and region</b>  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (56) |

Q25

SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Channel 4? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-K AND ROTATE ORDER. TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Channel 4 does a good job of catering for audiences that other channels don't cater for   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (57) |
|                          | b. Channel 4 is noticeably more innovative and risk-taking in its programmes than the other main TV channels   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (58) |
|                          | c. Channel 4 should be challenging orthodox views and standards even if this means offending some people   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (59) |
|                          | d. It is important for Channel 4 to show a high proportion of programmes that reflect life in the UK   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (60) |
|                          | e. Channel 4 takes a different approach to subjects as compared to other channels  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (61) |
| <input type="checkbox"/> | f. Channel 4 should show children's programmes that reflect life in the UK   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (62) |
|                          | g. Channel 4 should show programmes for teenagers that reflect life in the UK  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (63) |
|                          | h. It is important for Channel 4 to show programmes that get people interested in learning more  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (64) |
|                          | i. It is important for Channel 4 to show programmes for schools  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (65) |
|                          | j. It is important for Channel 4 to show programmes that reflect the needs of and concerns of different communities within the UK (for example, ethnic minority communities) | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (66) |
| <input type="checkbox"/> | k. Channel 4's digital channels, such as E4, More 4 and Film4 aren't important – Channel 4 should just focus on its main channel   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (67) |



Q26 WALES ONLY

Q26 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about S4C? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-C AND ROTATE ORDER. TICK START

|                             |  | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | It is important that S4C provides a wide range of programmes for Welsh speakers                        | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (68) |
| b.                          | It is important that S4C reflects life in Wales well   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (69) |
| <input type="checkbox"/> c. | It is important that S4C provides good coverage of events which are of interest to all people in Wales | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (70) |

CARD 4 10

Q27 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Five (which used to be called Channel Five)? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-E AND ROTATE ORDER. TICK START

|                             |   | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | It is important for Five to show dramas that reflect life in the UK   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (11) |
| b.                          | It is important for Five to show a high proportion of programmes that reflect life in the UK                  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (12) |
| c.                          | It is important for Five to show children's programmes that reflect life in the UK                            | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (13) |
| <input type="checkbox"/> d. | It is important for Five to show news programmes  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (14) |
| e.                          | Five's digital channels (Five US and Five Life) aren't important – Five should just focus on its main channel | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (15) |

Q28 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Teletext (that is, the text pages on ITV1 Wales and Channel 4, not text services on other channels such as Ceefax on the BBC)? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND ROTATE ORDER. TICK START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|---|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. It is important for Teletext to provide news   | 1                     | 2     | 3   | 4            | 5                         | 6             | (16) |
|                          | b. It is important for Teletext to provide current affairs                                    | 1                     | 2     | 3   | 4            | 5                         | 6             | (17) |
| <input type="checkbox"/> | c. It is important for Teletext to provide news about and made for people in Wales            | 1                     | 2     | 3   | 4            | 5                         | 6             | (18) |
|                          | d. It is important for Teletext to provide current affairs about and made for people in Wales | 1                     | 2     | 3   | 4            | 5                         | 6             | (19) |

## GENERAL VIEWS ABOUT PROGRAMME TYPES

Thank you for all your opinions so far about the quality of television. In this section of the questionnaire, we would like to ask your views about different types of programmes that are shown on television.

Q29 SHOWCARD N (R) From the following list, which are the five programme types you consider to be most valuable to you and your family personally on the main TV channels? You can pick up to five that are most important to you. CODE UP TO 5 ONLY

Q30 SHOWCARD N (R) AGAIN The previous question asked you which programme types were important to you personally. Now I would like you to think about how important these programmes are for the good of society as a whole. For example, you may personally think soaps are not important, but could still think they are important to society as a useful way of airing debates about current issues. So looking at the same list of programme types, please tell me which five you think are the most important for the main TV channels to provide for the good of society as whole. Again, you can pick up to five that you think are the most important. CODE UP TO 5 ONLY

Q31 SHOWCARD N (R) AGAIN Now thinking about programmes that are made in the UK. For which of the following do you think it is most important to be made in the UK and reflect life in the UK? Again, you can pick up to five that you think are the most important. CODE UP TO 5 ONLY

|   |   | Q29<br>(20) | Q30<br>(22) | Q31<br>(24) |
|---|---|-------------|-------------|-------------|
| A | News  | 1           | 1           | 1           |
| B | Current Affairs programmes such as<br>Tonight with Trevor McDonald and<br>Panorama  | 2           | 2           | 2           |
| C | Arts and classical music  | 3           | 3           | 3           |
| D | Children's  | 4           | 4           | 4           |
| E | Religious   | 5           | 5           | 5           |
| F | Serious Factual, including history,<br>nature or science programmes   | 6           | 6           | 6           |
| G | Other factual programmes including<br>hobbies, leisure and consumer affairs<br>e.g. Masterchef, Traffic Cops, and<br>The Gadget Show                        | 7           | 7           | 7           |
| H | Programmes of an educational nature   | 8           | 8           | 8           |
| I | Soaps   | 9           | 9           | 9           |
| J | Drama   | 0           | 0           | 0           |
| K | Films   | X           | X           | X           |
| L | Sport   | Y           | Y           | Y           |
|   |   | (21)        | (23)        | (25)        |
| M | Entertainment and contemporary<br>music e.g My Family, Strictly Come<br>Dancing and X Factor  | 1           | 1           | 1           |
| N | Comedy  | 2           | 2           | 2           |
| O | <b>1.1.1.4 News about and made for<br/>people in Wales</b>  | 3           | 3           | 3           |
| P | Current affairs about and made for<br>people in Wales e.g. Wales This<br>Week and Week in Week Out  | 4           | 4           | 4           |
| Q | Aside from news and current affairs,<br>other programmes about and made<br>for people in Wales e.g. The Ferret,<br>Iolo's Welsh Safari and Soccer<br>Sunday | 5           | 5           | 5           |
|   | Other (please write in and code 6)  | 6           |             |             |
|   |   |             | 6           |             |

|               |   |   |   |         |
|---------------|---|---|---|---------|
|               |   |   | 6 |         |
| None of these | 7 | 7 | 7 |         |
| Don't know    | 8 | 8 | 8 | (20-25) |

#### DETAILED VIEWS TOWARDS GENRES ON INDIVIDUAL CHANNELS

Q32 SHOWCARD O (R) I'd now like you to think about the types of programmes that TV channels provide. Some people think that there should be rules to make TV channels provide certain types of programmes, such as news, children's programmes, religious programmes, and programmes about Wales made for people in Wales. Other people say that it should be left for TV channels to decide what to show. Which of these statements is closest to your own views overall? SINGLE CODE ONLY

|   |  |   |
|---|--|---|
| A | There should be rules to make <u>all</u> TV channels (that is the main TV channels and digital channels) provide certain types of programmes such as news, children's programmes, religious programmes and programmes about Wales                | 1 |
| B | There should be rules to make <u>the main</u> TV channels (ie BBC One, BBC Two, ITV1 Wales, Channel Four, Five and S4C) provide certain types of programmes such as news, children's programmes, religious programmes and programmes about Wales | 2 |
| C | There should be rules just to make the <u>BBC</u> provide certain types of programmes such as news, children's programmes, religious programmes and programmes about Wales   | 3 |
| D | All TV channels should be free to decide for themselves what types of programmes they broadcast  | 4 |
|   | Don't know   | 5 |

(26)

INTERVIEWER: FOR Q33-35, READ OUT EACH QUESTION IN TURN FOR EACH GENRE – EG READ OUT Q33 FOR NEWS, Q34 FOR NEWS, Q35 FOR NEWS, THEN Q33 FOR CURRENT AFFAIRS, Q34 FOR CURRENT AFFAIRS, Q35 FOR CURRENT AFFAIRS, AND SO ON. ROTATE THE ORDER IN WHICH YOU ASK ABOUT EACH GENRE – IE DO NOT START WITH NEWS EACH TIME – AND TICK START. THE RESPONDENT SHOULD KEEP HOLD OF SHOWCARD P (R) THROUGHOUT THIS SECTION.

**Q33** The earlier questions asked you about the types of programmes you thought were important to you personally and for the good of society as a whole. Still thinking about the good of society, I now want you to think about how important it is that the main TV channels as a whole provide certain types of programme. So, for [READ OUT PROGRAMME TYPE], how important, if at all, do you think it is that these programmes are shown on the main TV channels as a whole? SINGLE CODE ONLY

**Q34** SHOWCARD P (R) AGAIN And how important, if at all, do you think it is that [READ OUT PROGRAMME TYPE] is shown on more than one of the main TV channels? SINGLE CODE ONLY

**Q35** And still thinking about [READ OUT PROGRAMME TYPE], please tell me whether you think there should be more, less or about the same amount of these types of programmes shown on the main TV channels than there is now? SINGLE CODE ONLY

REPEAT Q33-35 FOR EACH PROGRAMME TYPE A-P BELOW

**A News**

|   | Very<br>import<br>ant | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (27) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (28) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (29) |

**B Current Affairs**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (30) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (31) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (32) |

|  |                       |                        |                               |                          |                         |               |      |
|--|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| <b>C      News about and made for people in Wales</b>  |                       |                        |                               |                          |                         |               |      |
|  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (33) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                              | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (34) |
| Q35 More, less or about the same amount on the main TV channels?                                       | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (35) |
| <b>D      Current affairs about and made for people in Wales</b>                                       |                       |                        |                               |                          |                         |               |      |
|  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (36) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                              | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (37) |
| Q35 More, less or about the same amount on the main TV channels?                                       | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (38) |
| <b>E      Aside from news and current affairs, other programmes about and made for people in Wales</b> |                       |                        |                               |                          |                         |               |      |
|  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (39) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                              | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (40) |
| Q35 More, less or about the same amount on the main TV channels?                                       | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (41) |
| <b>F      Programmes that are made in the UK and reflect life in the UK</b>                            |                       |                        |                               |                          |                         |               |      |
|  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (42) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                              | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (43) |
| Q35 More, less or about the same amount on the main TV channels?                                       | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (44) |

|   |                       |                        |                               |                          |                         |               |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| <b>G</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Programmes that take place in different parts of the UK</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (45) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (46) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (47) |
| <b>H</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Children's programmes that reflect life in the UK</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (48) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (49) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (50) |
| <b>I</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Serious factual programmes for example, about nature, arts, science or history that are made in the UK</b> |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (51) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (52) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (53) |
| <b>J</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Dramas that reflect life in the UK</b>   |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (54) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (55) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (56) |

|        |  |                       |                        |                          |                          |                         |               |
|--------|--|-----------------------|------------------------|--------------------------|--------------------------|-------------------------|---------------|
| K<br>□ | <b>Comedies and sitcoms that are made in the UK</b>                                      |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (57)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (58)        |
| L      |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (59)          |
|        | <b>Programmes that get people interested in learning more about different topics</b>     |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (60)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (61)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (62)          |
| M      | <b>Religious programmes that are made in the UK</b>                                      |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (63)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (64)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (65)          |
| N      | <b>Programmes that appeal to a wide range of different cultural tastes and interests</b> |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (66)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (67)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (68)          |



|        |    |
|--------|----|
| CARD 5 | 10 |
|--------|----|

|          |       |
|----------|-------|
| SKIP COL | 11-13 |
|----------|-------|

☐ **Programmes that include people from different ethnic minority groups**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (14) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (15) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (16) |

☐ **Additional digital channels like BBC Three, E4, Five Life and ITV2**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| INTERVIEWER READ OUT<br>QUESTION WORDING AS SLIGHTLY<br>DIFFERENT                               |                       |                        |                               |                          |                         |               |      |
| Q33 Important that provided by the main television broadcasters?                                | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (17) |
| Q34 Important that <u>more than one</u> of the main television broadcasters provides them?      | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (18) |
| Q35 More, less or about the same amount provided by the main TV broadcasters than there is now? | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (19) |

Q36 SHOWCARD P (R) AGAIN **How important, if at all, is it that the main television channels as a whole provide...**

|    |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|----|--|-----------------------|------------------------|------------------|--------------------------|-------------------------|---------------|------|
| a. | Websites that provide additional content about different topics including news and entertainment | 1                     | 2                      | 3                | 4                        | 5                       | 6             | (20) |
| b. | Websites that allow you to watch TV programmes when you want to watch them                       | 1                     | 2                      | 3                | 4                        | 5                       | 6             | (21) |

**I'd now like you to think about news and current affairs on the main TV channels as well as digital channels and the internet.**

Q37 SHOWCARD Q (R) **To what extent do you agree or disagree with each of the following statements about news?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-C AND ROTATE ORDER – TICK START

|                             |  | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | It is important for each of the main TV channels to have at least one news programme during peak viewing hours (6pm-10.30pm)     | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (22) |
| b.                          | Now that there are dedicated digital news channels available, there is less of a need for news bulletins on the main TV channels | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (23) |
| <input type="checkbox"/> c. | The internet is a better source of news than the main TV channels  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (24) |

Q38 SHOWCARD Q (R) AGAIN **To what extent do you agree or disagree with each of the following statements on information about current affairs programmes such as Tonight with Trevor McDonald and Panorama?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND REVERSE ORDER – TICK START

|                             |   | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | The main TV channels shouldn't be made to show current affairs programmes, there's plenty of choice on the digital channels | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (25) |
| <input type="checkbox"/> b. | The internet is a better source of information about current affairs than the main TV channels                              | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (26) |

I'd now like you to think about news about and made for people in Wales.

Q39 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about news about and made for people in Wales? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Television is an important source of news about Wales  | 1                     | 2     | 3  | 4            | 5                         | 6             | (27) |
|                          | b. It is important for ITV1 Wales as well as the BBC to show news programmes about Wales  | 1                     | 2     | 3  | 4            | 5                         | 6             | (28) |
| <input type="checkbox"/> | c. News about Wales is of a generally high standard   | 1                     | 2     | 3  | 4            | 5                         | 6             | (29) |
|                          | d. The main TV channels shouldn't be made to show news programmes about Wales, there's plenty of news on the internet about Wales | 1                     | 2     | 3  | 4            | 5                         | 6             | (30) |

Q40 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about programmes about and made for people in Wales aside from news and current affairs? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS (A-F) AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Other than the news and current affairs, programmes about Wales are of no interest to me | 1                     | 2     | 3  | 4            | 5                         | 6             | (31) |
|                          | b. It is important to show programmes that take place in Wales                              | 1                     | 2     | 3  | 4            | 5                         | 6             | (32) |
| <input type="checkbox"/> | c. Broadcasters shouldn't be made to show set amounts of programmes about Wales             | 1                     | 2     | 3  | 4            | 5                         | 6             | (33) |
|                          | ASK ONLY IN NORTHERN IRELAND  |                       |       |  |              |                           |               |      |
| d.                       |   |                       |       |  |              |                           |               | (34) |
| e.                       |   |                       |       |  |              |                           |               | (35) |
| f.                       | ASK ONLY IN SCOTLAND  |                       |       |  |              |                           |               |      |
|                          |   |                       |       |  |              |                           |               | (36) |
| g.                       | ASK ONLY IN WALES   |                       |       |  |              |                           |               |      |
|                          | It is important that some programmes shown in Wales are in Welsh                            | 1                     | 2     | 3  | 4            | 5                         | 6             | (37) |

ASK ALL

I'd now like to you to think about how you find out information about your local area.

Q41 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about information about your local area? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A AND B AND REVERSE ORDER – TICK BOX START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a | 1                     | 2     | 3  | 4            | 5                         | 6             | (38) |
|                          |   |                       |       |  |              |                           |               |      |
| <input type="checkbox"/> | b | 1                     | 2     | 3  | 4            | 5                         | 6             | (39) |
|                          |   |                       |       |  |              |                           |               |      |

I'd now like you to think about children's programmes on television.

Q42 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree the following statements about children's programmes on television? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS AND REVERSE ORDER – TICK BOX START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a | 1                     | 2     | 3  | 4            | 5                         | 6             | (40) |
|                          |   |                       |       |  |              |                           |               |      |
|                          | b | 1                     | 2     | 3  | 4            | 5                         | 6             | (41) |
|                          |   |                       |       |  |              |                           |               |      |
|                          | c | 1                     | 2     | 3  | 4            | 5                         | 6             | (42) |
|                          |   |                       |       |  |              |                           |               |      |
| <input type="checkbox"/> | d | 1                     | 2     | 3  | 4            | 5                         | 6             | (43) |
|                          |   |                       |       |  |              |                           |               |      |

Q43

SHOWCARD R (R) In the future, it may be the case that the main TV channels may not be able to provide all of the types of content that we have been talking about. For each of the content types that I'm about to read out, please can you tell me which of these statements is closest to your views? If you agree with statements B, C, and D please say so. CAN MULTICODE B, C AND D (DIGITAL CHANNELS AND INTERNET) OTHERWISE SINGLE CODE. READ OUT STATEMENTS A-M AND ROTATE ORDER – TICK BOX START

|                          |    | A) This needs to be shown on the main TV channels   | B) This doesn't need to be shown on the main TV channels so long as people can get it on digital channels provided by the main TV broadcasters (e.g. BBC Three, E4, Five Life, ITV2.) | C) This doesn't need to be shown on the main TV channels as the other digital channels provide this type of content (e.g. Sky One, Sky News, Living, Sky Sports, Sky Movies) | D) This doesn't need to be shown on the main TV channels so long as people can get this type of content on the internet | Don't know |        |
|--------------------------|----|---|---|--|---|------------|--------|
| <input type="checkbox"/> | a. | <b>News</b>   | 1   | 2  | 3   | 4          | 5 (44) |
|                          | b. | <b>Current affairs</b>  | 1   | 2  | 3   | 4          | 5 (45) |
|                          | c. | <b>News and information about and made for people in Wales</b>                                      | 1   | 2  | 3   | 4          | 5 (46) |
|                          | d. | <b>News and information about your local area</b>   | 1   | 2  | 3   | 4          | 5 (47) |
|                          | e. | <b>Children's programmes that reflect life in the UK</b>  | 1   | 2  | 3   | 4          | 5 (48) |
| <input type="checkbox"/> | f. | <b>Serious factual programmes (for example, about nature, science or history)</b>                   | 1   | 2  | 3   | 4          | 5 (49) |
|                          | g. | <b>Drama that reflects life in the UK</b>   | 1   | 2  | 3   | 4          | 5 (50) |
|                          | h. | <b>Programmes for schools (for example, BBC Learning Zone and Channel 4 Programmes for Schools)</b> | 1   | 2  | 3   | 4          | 5 (51) |
|                          | i. | <b>Entertainment</b>  | 1   | 2  | 3   | 4          | 5 (52) |
|                          | j. | <b>Sports</b>   | 1   | 2  | 3   | 4          | 5 (53) |
| <input type="checkbox"/> | k. | <b>Programmes that get people interested in learning about different topics</b>                     | 1   | 2  | 3   | 4          | 5 (54) |
|                          | l. | <b>Arts programmes made in the UK</b>   | 1   | 2  | 3   | 4          | 5 (55) |
|                          | m. | <b>Religious</b>  | 1   | 2  | 3   | 4          | 5 (56) |

|                              |  |  |   |
|------------------------------|--|--|---|
| programmes made<br>in the UK |  |  | ) |
|------------------------------|--|--|---|

Q44 SHOWCARD S (R) **Finally, thinking about everything we have talked about today, how satisfied or dissatisfied are you with...? READ OUT A-D, SINGLE CODE ONLY**

|   | Very<br>satisfied | Fairly<br>satisfied | Neither<br>/nor | Fairly<br>dissatisfied | Very<br>dissatisfied | Don't<br>know |          |
|---|-------------------|---------------------|-----------------|------------------------|----------------------|---------------|----------|
| a) The main TV channels   | 1                 | 2                   | 3               | 4                      | 5                    | 6             | (57<br>) |
| b) The digital channels provided by the main TV broadcasters – BBC Three, E4, Five Life, ITV2 and so on | 1                 | 2                   | 3               | 4                      | 5                    | 6             | (58<br>) |
| c) Other digital TV channels – eg Sky One, Sky News, Living, Sky Sports, Sky Movies and so on           | 1                 | 2                   | 3               | 4                      | 5                    | 6             | (59<br>) |
| d) All the TV that is available to you as a whole   | 1                 | 2                   | 3               | 4                      | 5                    | 6             | (60<br>) |

**Thank you very much for your time – your views will make a difference to the future of television in the UK. I now just need to ask you some questions about yourself to help us analyse the results – PLEASE GO TO DEMOGRAPHICS**

**THIS MUST BE THE LAST PAGE OF THE QUESTIONNAIRE AND MUST BE SINGLE SIDED**

Ipsos MORI/31644BB01  
1-5

Questionnaire No:

|           |    |
|-----------|----|
| Serial No |    |
| OUO (6-9) |    |
| CARD      | 10 |

**Ofcom PSB Survey – Wales (Version 2)**  
**Final Questionnaire**

Interviewer Number:

-       
(11) (12) (13) (14) (15) (16) (11-16)

Name/Initial/Title: Mr/Mrs/Ms/Miss

Address:

Full Postcode

QTEL1 **Do you have a fixed line telephone at home which you use for incoming and outgoing voice calls?**

|                       |   |             |
|-----------------------|---|-------------|
| Yes                   | 1 |             |
| WRITE IN Full tel. No |   |             |
| No                    | 2 |             |
| Refused               | 3 | GO TO QTEL2 |
| Ex-directory          | 4 |             |

QTEL2 **ASK IF NO FIXED LINE/REFUSED/EX-DIRECTORY (CODES 2-4). OTHERS CLOSE**  
**Can I just check, do you have a mobile phone? IF YES ASK: Can I take the number please?**

|                       |   |  |
|-----------------------|---|--|
| Yes                   | 1 |  |
| WRITE IN Full tel. No |   |  |
| No                    | 2 |  |
| Refused               | 3 |  |

**IT IS VERY IMPORTANT THAT YOU FILL IN THE SAMPLE POINT NUMBER, QUESTIONNAIRE NUMBER AND INTERVIEWER NUMBER ON BOTH THE FRONT AND BACK PAGE OF THE QUESTIONNAIRE.**

Please look on the intranet under documents/data protection for examples of agreement to re-contact respondents and consent forms



**Ofcom PSB Survey – Scotland (Version 3)**  
**Final Questionnaire**

Sample Point Number:

Sample point name:

**SECTION A: DEMOGRAPHICS**

**Sampling Point Summary:**

**CABLE (SINGLE CODE)**

|                    |   |      |
|--------------------|---|------|
| Cable Coverage     | 1 |      |
| Non-Cable Coverage | 2 | (11) |

**URBAN/RURAL (SINGLE CODE)**

|                                |   |      |
|--------------------------------|---|------|
| Cities/large towns – urban- GB | 1 |      |
| Medium-size towns – urban- GB  | 2 |      |
| Small towns – urban- GB        | 3 |      |
| Rural - GB                     | 4 |      |
| Urban - NI                     | 5 |      |
| Rural - NI                     | 6 | (12) |

**DEPRIVATION (SINGLE CODE )**

|                    |   |      |
|--------------------|---|------|
| Low Deprivation    | 1 |      |
| Medium Deprivation | 2 |      |
| High Deprivation   | 3 | (13) |

**GEOGRAPHIC AREA (Government Region) (SINGLE CODE)**

|                    |   |      |
|--------------------|---|------|
| London             | 1 |      |
| South East         | 2 |      |
| South West         | 3 |      |
| East Midlands      | 4 |      |
| West Midlands      | 5 |      |
| North East         | 6 |      |
| North West         | 7 |      |
| East England       | 8 |      |
| Yorkshire & Humber | 9 |      |
| Scotland           | 0 |      |
| Wales              | X |      |
| Northern Ireland   | Y | (14) |

**QA Gender**

|        |   |      |
|--------|---|------|
| Male   | 1 |      |
| Female | 2 | (15) |

WRITE IN & CODE EXACT AGE

QB    **Exact**          
**Age**                      (16)              (17)

|  |       |   |      |
|--|-------|---|------|
|  | 16-17 | 1 |      |
|  | 18-24 | 2 |      |
|  | 25-34 | 3 |      |
|  | 35-44 | 4 |      |
|  | 45-54 | 5 |      |
|  | 55-64 | 6 |      |
|  | 65-74 | 7 |      |
|  | 75+   | 8 | (18) |

### Interviewer Declaration

I confirm that I have carried out this Interview face-to-face with the named person of the address attached and that I asked all the relevant questions fully and recorded the answers in conformance with the survey specification and within the MRS Code of Conduct and the Data Protection Act 1998.

Signature: .....

Interviewer Name (CAPS): .....

.....

Interviewer Number:

-                   
 (19)    (20)    (21)    (22)    (23)    (24)              (19-24)

Day of Interview    1    2    3    4    5    6    7  
                             (Mon)    (Thur)    (Sun)    (25)

Date of Interview:      /   /07    (26-

Length of Interview:      (minutes)    (30-

**QC Respondent is: SINGLE  
CODE**

|   |   |
|---|---|
| Working full-time (30hrs/wk+)   | 1 |
| Working part-time (8-29hrs/wk)  | 2 |
| Not working<br>(i.e. under 8hrs/week) retired   | 3 |
| Not working<br>(i.e. under 8hrs/week)<br>unemployed (registered/not<br>registered but looking for work) | 4 |
| Not working<br>(i.e. under 8hrs/week)<br>student  | 5 |
| Not working<br>(i.e. under 8hrs/week)<br>housewife /disabled /other                                     | 6 |
| Don't know  | 7 |

(32)

**QD SHOWCARD T Which of the groups  
on this card, if any, would you say you  
belong to? SINGLE CODE ONLY**

|  |      |
|--|------|
| <b>WHITE</b>                             | (33) |
| British                                  | 1    |
| Irish                                    | 2    |
| Any other white background               | 3    |
| <b>MIXED</b>                             |      |
| White and Black Caribbean                | 4    |
| White and Black African                  | 5    |
| White and Asian                          | 6    |
| Any other mixed background               | 7    |
| <b>ASIAN OR ASIAN BRITISH</b>            |      |
| Indian                                   | 8    |
| Pakistani                                | 9    |
| Bangladeshi                              | 0    |
| Any other Asian background               | X    |
| <b>BLACK OR BLACK BRITISH</b>            |      |
| Caribbean                                | Y    |
|  | (34) |
| African                                  | 1    |
| Any other black background               | 2    |
| <b>CHINESE OR OTHER ETHNIC<br/>GROUP</b> |      |
| Chinese                                  | 3    |
| Any other background                     | 4    |
| Refused                                  | 5    |

**QE Home is: SINGLE  
CODE**

|   |   |
|---|---|
| Being bought on mortgage                                  | 1 |
| Owned outright by household                               | 2 |
| Rented from Local Authority/<br>Housing Association/Trust | 3 |
| Rented from private landlord                              | 4 |
| Other   | 5 |
| Don't know  | 6 |

(35)

**QF Occupation of Chief Income Earner**

Position/rank/grade

Industry/type of company

Quals/degree/apprenticeship

Number of staff responsible for

REMEMBER TO PROBE FULLY AND CODE  
FROM ABOVE

**QG Class**

|    |   |
|----|---|
| A  | 1 |
| B  | 2 |
| C1 | 3 |
| C2 | 4 |
| D  | 5 |
| E  | 6 |

(36)

**QH Total number in household (including  
respondent and any children)**

(37)

**Number of children in household (Under 16)**

(38)

ASK IF HAVE AT LEAST ONE CHILD IN HH  
(UNDER 16)

QI **How old is/are your child/ren?** MULTICODE  
OK

|            | (39) |
|------------|------|
| 1 or under | 1    |
| 2          | 2    |
| 3          | 3    |
| 4          | 4    |
| 5          | 5    |
| 6          | 6    |
| 7          | 7    |
| 8          | 8    |
| 8          | 9    |
| 10         | 0    |
| 11         | X    |
| 12         | Y    |
|            | (40) |
| 13         | 1    |
| 14         | 2    |
| 15         | 3    |

(39-40)

ASK ALL WITH CHILDREN UNDER 16 IN THE  
HOUSEHOLD

QJ **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 |

(41)

ASK ALL

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

YOU OTHER  
H/HOLD  
MEMBER

|            | (42) | (43) |
|------------|------|------|
| Yes        | 1    | 1    |
| No         | 2    | 2    |
| Don't know | 3    | 3    |

(42-43)

ASK ALL

QL **SHOWCARD U (R) Would you please  
tell me the letter from this card for  
the group in which you would place  
your total household income from  
all sources before tax and  
deductions.** REASSURE ABOUT  
CONFIDENTIALITY

|                     | (44) |
|---------------------|------|
| B Less than £11,500 | 1    |
| E £11,500 - £17,499 | 2    |
| D £17,500 - £29,999 | 3    |
| A £30,000 - £49,999 | 4    |
| C £50,000 and over  | 5    |
| Refused             | 6    |
| Don't know          | 7    |

(44)

#### MOBILE PHONES

QM **Do you personally use a  
mobile phone** SINGLE CODE

|            |   |
|------------|---|
| Yes        | 1 |
| No         | 2 |
| Don't know | 3 |

(45)

#### LANGUAGE

QN **Do you speak or have an  
understanding of...** ONLY READ OUT D

|                   |   |
|-------------------|---|
| a. Irish          | 1 |
| b. Ulster Scots   | 2 |
| c. Welsh          | 3 |
| d. <b>Gaelic</b>  | 4 |
| None of the above | 5 |
| Don't know        | 6 |

(46)

INTERVIEWER RECORD END TIME AFTER DEMOGRAPHICS

Hours Mins

INTERVIEWER RECORD START TIME

|                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Hours                |                      | Mins                 |                      |

**INTRODUCTION/CONFIDENTIALITY**

Good morning, afternoon, evening. My name is ..... from Ipsos MORI, the research organisation, and we are carrying out a survey for Ofcom, the independent body set up by the Government to oversee broadcasting and telecommunications in the UK. We'd like you to answer some questions about television in the UK – what's good and bad about it, and which channels should show which type of programmes. This is your opportunity for you to help shape the future of television. The survey will take about 35 minutes. We also want to find out your views about the internet and other types of media (such as radio, newspapers etc).

Initially, we would like to ask you some broad questions about your attitudes towards television and the media in general.

**I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual or address in the results.**

**TELEVISION VIEWING**

ASK ALL

Q35. **First of all, on an average day how many hours would you say you watch TV? SINGLE CODE**

|                     |   |
|---------------------|---|
| Up to about an hour | 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 |

(11)

Q36. **SHOWCARD A (R) Which, if any, of these types of television does your household receive at the moment? MULTICODE OK**

|   |   |   |          |
|---|---|---|----------|
| A | Only the main channels (BBC One, BBC Two, STV, Channel 4 and Five)  | 1 | GO TO Q5 |
| B | Cable TV (through NTL / Telewest / Virgin Media)  | 2 | GO TO Q4 |
| C | Satellite TV (Sky)  | 3 | ASK Q3   |
| D | Satellite TV (Other)  | 4 |          |
| E | Freeview (through a set-top box or digital television set) with ONLY free channels  | 5 | GO TO Q4 |
| F | 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 |          |
| G | Digital TV via a broadband DSL line (from HomeChoice or Kingston Communications)  | 7 |          |
|   | Any other mention of Virgin   | 8 | GO TO Q5 |
|   | Other (please write in and code 9)  | 9 |          |

|                    |  |   |          |      |
|--------------------|--|---|----------|------|
|                    |  |   |          |      |
| No TV in household |  | 0 | GO TO Q7 |      |
| Don't know         |  | X | GO TO Q5 | (12) |

|   |   |  |      |
|---|---|--|------|
| Q37. ASK THOSE WITH SATELLITE TV (CODES 3-4 AT Q2)  |   |  |      |
| <b>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</b> |   |  |      |
| Receive subscription channels<br>(pay a monthly subscription fee)   | 1 |  |      |
| Free-to-air services only (no<br>monthly subscription fee)  | 2 |  |      |
| Don't know  | 3 |  | (13) |

|  |   |  |      |
|--|---|--|------|
| Q38. ASK THOSE WITH MULTICHANNEL TV (CODES 2-8 AT Q2)  |   |  |      |
| <b>Does your household have a device that has a hard disc and allows you to pause, rewind and record live TV programmes? These are sometimes known as Sky +, V+, Tivo or Telewest drive. SINGLE CODE</b> |   |  |      |
| Yes  | 1 |  |      |
| No   | 2 |  |      |
| Don't know   | 3 |  | (14) |

|  |                                  |   |      |
|--|----------------------------------|---|------|
| ASK ALL WITH TV IN HOUSEHOLD   |                                  |   |      |
| Q39. SHOWCARD B (R) <b>Which of these television channels and services, if any, would you say you watch regularly? That is, a few times a week. MULTICODE OK</b> |                                  |   |      |
| A  | BBC One                          | 1 |      |
| B  | BBC Two                          | 2 |      |
| C  | STV                              | 3 |      |
| D  | Channel 4                        | 4 |      |
| E  | Five                             | 5 |      |
| F  | Teletext or Ceefax               | 6 |      |
|  | <i>Spare line for Wales only</i> |   |      |
|  | None of them                     | 8 |      |
|  | Don't know                       | 9 | (15) |

Q40. SHOWCARD C (R) And which of the following types of programmes, if any, would you say you watch regularly on the main TV channels (that is BBC One, BBC Two, STV, Channel 4 and Five? MULTICODE OK

|   |   |      |
|---|---|------|
|   |   | (16) |
| A | News  | 1    |
| B | Current Affairs programme such as Tonight with Trevor McDonald and Panorama   | 2    |
| C | Arts and classical music  | 3    |
| D | Children's  | 4    |
| E | Religious   | 5    |
| F | Serious Factual, including history, nature or science programmes  | 6    |
| G | Other factual programmes including hobbies, leisure and consumer affairs e.g. Masterchef, Traffic Cops, and The Gadget Show           | 7    |
| H | Programmes of an educational nature   | 8    |
| I | Soaps   | 9    |
| J | Drama   | 0    |
| K | Films   | X    |
| L | Sport   | Y    |
|   |   | (17) |
| M | Entertainment and contemporary music e.g My Family, Strictly Come Dancing and X Factor  | 1    |
| N | Comedy  | 2    |
| O | <b>1.1.1.5 News about and made for people in Scotland</b>   | 3    |
| P | Current affairs about and made for people in Scotland e.g. Newsnight Scotland and Politics Now  | 4    |
| Q | Aside from news and current affairs, other programmes about and made for people in Scotland e.g. Still Game, River City and Scotsport | 5    |
|   | Other   | 0    |
|   | None of these   | X    |
|   | Don't know  | Y    |

(16-17)

# INTERNET USAGE

**I would now like to ask you about the internet**

Q41. ASK ALL

**Do you personally use the internet? SINGLE CODE**

|            |   |           |
|------------|---|-----------|
| Yes        | 1 | ASK Q8    |
| No         | 2 | GO TO Q11 |
| Don't know | 3 |           |

(18)

Q42. ASK THOSE WITH INTERNET ACCESS (CODE 1 AT Q7)

**Where do you access the internet? MULTICODE OK**

|   |   |           |
|---|---|-----------|
| At home   | 1 | ASK Q9    |
| At work (out of home)   | 2 | GO TO Q10 |
| At a public place (internet café, library, by mobile phone, etc.) | 3 |           |
| At university / college   | 4 |           |
| At school   | 5 |           |
| Elsewhere (friends, relatives, etc.)                              | 6 |           |
| Other   | 7 |           |
| Don't know  | 8 |           |

(19)

Q43. ASK THOSE WITH INTERNET ACCESS AT HOME (CODE 1 AT Q8)

**SHOWCARD D (R) And which of these methods does your household use to connect to the internet at home? Just read out the letter or letters that apply. MULTICODE OK**

|   |  |   |
|---|--|---|
| A | Ordinary phone line – dial-up access   | 1 |
| B | Broadband - high-speed access, allowing you to make telephone calls at the same time as using the internet | 2 |
| C | Wireless access through a wireless router, WIFI or portable device   | 3 |
|   | Other (please write in and code 4)   | 4 |
|   | Don't know   | 5 |

(20)

Q44. ASK THOSE WITH ANY INTERNET ACCESS (CODE 1 AT Q7)

**How often do you tend to use the internet? SINGLE CODE ONLY**

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

(21)



# CROSS-PLATFORM PREFERENCES FOR DIFFERENT TYPES OF CONTENT

ASK ALL

Throughout this questionnaire, I am going to be asking you questions about the main TV channels. When I ask you about these, I am talking about the five main TV channels – BBC One, BBC Two, STV, Channel 4, and Five

READ OUT a-e AND ROTATE ORDER LIST. TICK START.

Q45. SHOWCARD E (R) Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? MULTICODE OK

Q46. And which of these different media would you say is your main source for...? SINGLE CODE INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS.

|            |  | a.<br>Entertainment      |      | b.<br>News about<br>the UK |      | c.<br>News about<br>the world |      | d.<br>News about and<br>made for people in<br>Scotland |      | e.<br>News about<br>your local<br>area |      |
|------------|--|--------------------------|------|----------------------------|------|-------------------------------|------|--|------|--|------|
|            |  | ALL                      | MAIN | ALL                        | MAIN | ALL                           | MAIN | ALL  | MAIN | ALL                                    | MAIN |
| TICK START |  | <input type="checkbox"/> |      | <input type="checkbox"/>   |      | <input type="checkbox"/>      |      | <input type="checkbox"/>                               |      | <input type="checkbox"/>               |      |
|            |  | (22)                     | (24) | (26)                       | (28) | (30)                          | (32) | (34)   | (36) | (38)                                   | (40) |
| A          | TV on the main channels  | 1                        | 1    | 1                          | 1    | 1                             | 1    | 1  | 1    | 1                                      | 1    |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2                        | 2    | 2                          | 2    | 2                             | 2    | 2  | 2    | 2                                      | 2    |
| C          | Radio  | 3                        | 3    | 3                          | 3    | 3                             | 3    | 3  | 3    | 3                                      | 3    |
| D          | Newspapers   | 4                        | 4    | 4                          | 4    | 4                             | 4    | 4  | 4    | 4                                      | 4    |
| E          | Magazines  | 5                        | 5    | 5                          | 5    | 5                             | 5    | 5  | 5    | 5                                      | 5    |
| F          | Books  | 6                        | 6    | 6                          | 6    | 6                             | 6    | 6  | 6    | 6                                      | 6    |
| G          | Internet via pc or laptop  | 7                        | 7    | 7                          | 7    | 7                             | 7    | 7  | 7    | 7                                      | 7    |
| H          | Teletext or Ceefax   | 8                        | 8    | 8                          | 8    | 8                             | 8    | 8  | 8    | 8                                      | 8    |
| I          | Videos/DVDs  | 9                        | 9    | 9                          | 9    | 9                             | 9    | 9  | 9    | 9                                      | 9    |
| J          | Computer games/games console   | 0                        | 0    | 0                          | 0    | 0                             | 0    | 0  | 0    | 0                                      | 0    |
|            | Other  | X                        | X    | X                          | X    | X                             | X    | X  | X    | X                                      | X    |
|            | I'm not interested in this   | Y                        | Y    | Y                          | Y    | Y                             | Y    | Y  | Y    | Y                                      | Y    |
|            |  | (23)                     | (25) | (27)                       | (29) | (31)                          | (33) | (35)   | (37) | (39)                                   | (41) |
|            | None   | 1                        | 1    | 1                          | 1    | 1                             | 1    | 1  | 1    | 1                                      | 1    |
|            | Don't know   | 2                        | 2    | 2                          | 2    | 2                             | 2    | 2  | 2    | 2                                      | 2    |

- Q11 READ OUT f-i AND ROTATE ORDER LIST. TICK START.  
SHOWCARD E (R) AGAIN Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for each of the following categories? MULTICODE OK
- Q12 And which of these different media would you say is your main source for...?INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS. SINGLE CODE

|            |  | f.<br>Your<br>personal<br>interests<br>and<br>pastimes |                                  | g.<br>Knowledge<br>about<br>topics such<br>as arts,<br>science<br>nature or<br>history |                                  | h<br>Sports news<br>and<br>information |                                  | i<br>Finding out<br>about people<br>with <u>similar</u><br>interests to<br>your own |                                  |
|------------|--|--|----------------------------------|--|----------------------------------|--|----------------------------------|---|----------------------------------|
|            |  | ALL  | MAIN                             | ALL  | MAIN                             | ALL                                    | MAIN                             | ALL   | MAIN                             |
| TICK START |  | <input type="checkbox"/><br>(42)                       | <input type="checkbox"/><br>(44) | <input type="checkbox"/><br>(46)   | <input type="checkbox"/><br>(48) | <input type="checkbox"/><br>(50)       | <input type="checkbox"/><br>(52) | <input type="checkbox"/><br>(54)  | <input type="checkbox"/><br>(56) |
| A          | TV on the main channels  | 1  | 1                                | 1  | 1                                | 1                                      | 1                                | 1   | 1                                |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2  | 2                                | 2  | 2                                | 2                                      | 2                                | 2   | 2                                |
| C          | Radio  | 3  | 3                                | 3  | 3                                | 3                                      | 3                                | 3   | 3                                |
| D          | Newspapers   | 4  | 4                                | 4  | 4                                | 4                                      | 4                                | 4   | 4                                |
| E          | Magazines  | 5  | 5                                | 5  | 5                                | 5                                      | 5                                | 5   | 5                                |
| F          | Books  | 6  | 6                                | 6  | 6                                | 6                                      | 6                                | 6   | 6                                |
| G          | Internet via pc or laptop  | 7  | 7                                | 7  | 7                                | 7                                      | 7                                | 7   | 7                                |
| H          | Teletext or Ceefax   | 8  | 8                                | 8  | 8                                | 8                                      | 8                                | 8   | 8                                |
| I          | Videos/DVDs  | 9  | 9                                | 9  | 9                                | 9                                      | 9                                | 9   | 9                                |
| J          | Computer games/games console   | 0  | 0                                | 0  | 0                                | 0                                      | 0                                | 0   | 0                                |
|            | Other  | X  | X                                | X  | X                                | X                                      | X                                | X   | X                                |
|            | I'm not interested in this   | Y  | Y                                | Y  | Y                                | Y                                      | Y                                | Y   | Y                                |
|            |  | (43)   | (45)                             | (47)   | (49)                             | (51)                                   | (53)                             | (55)  | (57)                             |
|            | None   | 1  | 1                                | 1  | 1                                | 1                                      | 1                                | 1   | 1                                |
|            | Don't know   | 2  | 2                                | 2  | 2                                | 2                                      | 2                                | 2   | 2                                |

(42-57)

- READ OUT j-k AND ROTATE ORDER LIST. TICK START.
- Q11 SHOWCARD E (R) AGAIN Which of these different media available to you (such as television, radio, internet etc) would you say you use as a source for each of the following categories? MULTICODE OK
- Q12 And which of these different media would you say is your main source for...?INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS. SINGLE CODE

|            |  | j<br>Finding about<br>people with<br>values and<br>lifestyles that<br>are <u>different</u><br>to your own |              | k<br>Discovering<br>new things          |              |
|------------|--|---|--------------|---|--------------|
|            |  | ALL<br><input type="checkbox"/><br>(58)   | MAIN<br>(60) | ALL<br><input type="checkbox"/><br>(62) | MAIN<br>(64) |
| TICK START |  |   |              |   |              |
| A          | TV on the main channels  | 1   | 1            | 1                                       | 1            |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2   | 2            | 2                                       | 2            |
| C          | Radio  | 3   | 3            | 3                                       | 3            |
| D          | Newspapers   | 4   | 4            | 4                                       | 4            |
| E          | Magazines  | 5   | 5            | 5                                       | 5            |
| F          | Books  | 6   | 6            | 6                                       | 6            |
| G          | Internet via pc or laptop  | 7   | 7            | 7                                       | 7            |
| H          | Teletext or Ceefax   | 8   | 8            | 8                                       | 8            |
| I          | Videos/DVDs  | 9   | 9            | 9                                       | 9            |
| J          | Computer games/ games console  | 0   | 0            | 0                                       | 0            |
|            | Other  | X   | X            | X                                       | X            |
|            | I'm not interested in this   | Y   | Y            | Y                                       | Y            |
|            |  | (59)  | (61)         | (63)                                    | (65)         |
|            | None   | 1   | 1            | 1                                       | 1            |
|            | Don't know   | 2   | 2            | 2                                       | 2            |
|            |  |   |              |   | (58-65)      |
| CARD 3     |  |   |              |   | 10           |

- Q47. SHOWCARD E (R) AGAIN And looking at this list again, which one of these, if any, do you think you would find it hardest to live without? SINGLE CODE ONLY

|   |  |      |
|---|--|------|
|   |  | (11) |
| A | TV on the main channels  | 1    |
| B | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2    |
| C | Radio  | 3    |
| D | Newspapers   | 4    |
| E | Magazines  | 5    |
| F | Books  | 7    |
| G | Internet via pc or laptop  | 8    |
| H | Teletext or Ceefax   | 9    |
| I | Videos/DVDs  | 0    |
| J | Computer games / games console   | X    |
|   | Other  | Y    |
|   |  | (12) |
|   | None   | 1    |

|  |            |   |         |
|--|------------|---|---------|
|  | Don't know | 2 | (11-12) |
|--|------------|---|---------|

Q48. SHOWCARD F (R) **To what extent do you agree or disagree with each of the following statements about television?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-J AND ROTATE ORDER. TICK START

|                          |   | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--------------------------|---|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
| <input type="checkbox"/> | a. <b>As well as entertaining and informing people, television has an important social role to play</b>                                       | 1                     | 2     | 3  | 4             | 5                             | 6                 | (13) |
|                          | b. <b>Television should help to promote understanding and tolerance of different religions, cultures and lifestyles</b>                       | 1                     | 2     | 3  | 4             | 5                             | 6                 | (14) |
|                          | c. <b>Television's main role should be to provide entertainment rather than information or education</b>                                      | 1                     | 2     | 3  | 4             | 5                             | 6                 | (15) |
|                          | d. <b>I have personally learned useful things from watching television</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (16) |
|                          | e. <b>Television is very influential in shaping public opinion about political and other important issues</b>                                 | 1                     | 2     | 3  | 4             | 5                             | 6                 | (17) |
| <input type="checkbox"/> | f. <b>Television has an important role to play in making people interested in different subjects, like arts, nature, sciences and history</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (18) |
|                          | g. <b>It is important that television is available to everyone</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (19) |
|                          | h. <b>Television has an important role in helping children and teenagers understand life in the UK</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (20) |
| <input type="checkbox"/> | i. <b>With so many channels now available, it's hard to find what I want</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (21) |
|                          | j. <b>TV programmes sometimes change the way I think about things</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (22) |

Q49. SHOWCARD F (R) AGAIN **And to what extent do you agree or disagree with each of the following statements about the internet?** SINGLE CODE ONLY FOR EACH LINE.  
READ OUT STATEMENTS (A-I) AND (J-L) AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--------------------------|---|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
| <input type="checkbox"/> | a. <b>As well as entertaining and informing people, the internet has an important social role to play</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (23) |
|                          | b. <b>The internet should help to promote understanding and tolerance of different religions, cultures and lifestyles</b>                         | 1                     | 2     | 3  | 4             | 5                             | 6                 | (24) |
|                          | c. <b>The internet's main role should be to provide entertainment rather than information or education</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (25) |
| <input type="checkbox"/> | d. <b>The internet is very influential in shaping public opinion about political and other important issues</b>                                   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (26) |
|                          | e. <b>The internet is a valuable source of information and learning</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (27) |
|                          | f. <b>The internet has an important role to play in making people interested in different subjects like the arts, nature, science and history</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (28) |
| <input type="checkbox"/> | g. <b>The internet has an important role to play in helping children and teenagers understand life in the UK</b>                                  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (29) |
|                          | h. <b>The internet is a valuable source of information and entertainment for children and teenagers</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (30) |
|                          | i. <b>It's important that the internet is available to everyone</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (31) |

ASK J-L OF THOSE WITH INTERNET ACCESS. CODE 1 AT Q7.

|  |  | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--|--|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
|  | j. <b>With so many websites on the internet, it's hard to find what I want</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (32) |
|  | k. <b>I have personally learned useful things from the internet</b>            | 1                     | 2     | 3  | 4             | 5                             | 6                 | (33) |
|  | l. <b>Websites sometimes change the way I think about things</b>               | 1                     | 2     | 3  | 4             | 5                             | 6                 | (34) |

Q50. ASK ALL **Thinking about the main TV channels, that is BBC One, BBC Two, STV, Channel 4 and Five, would you say you are watching them more, less, or about the same as you were 4-5 years ago?** SINGLE CODE ONLY

|                |   |           |
|----------------|---|-----------|
| More           | 1 | GO TO Q18 |
| About the same | 2 |           |
| Less           | 3 | ASK Q17   |
| Don't know     | 4 | GO TO Q18 |

(35)

Q51. ASK THOSE WHO SAY THEY WATCH LESS TV. CODE 3 AT Q16. OTHERS GO TO Q18  
SHOWCARD G (R) **Could you say why it is you are watching them less than 4-5 years ago?** MULTICODE OK

|   |   |   |
|---|---|---|
| A | I am less interested in watching TV generally now   | 1 |
| B | I have less time to watch TV generally now because I am too busy or have had a change in my circumstances | 2 |
| C | I watch more of the main TV channels' digital channels instead – e.g. BBC Three, E4, Five Life, ITV2      | 3 |
| D | I watch more of other digital channels instead – e.g. Sky One, Sky News, Living, Sky Sports, Sky Movies   | 4 |
| E | I use the internet more instead of watching TV  | 5 |
| F | I play computer games more instead of watching TV   | 6 |
| G | I don't find the programmes as enjoyable/interesting as I used to do                                      | 7 |
| H | There are fewer programmes that appeal to my interests  | 8 |
|   | Other (please write in and code 9)  | 9 |
|   | Don't know  | 0 |

(36)

## HARD CHOICES: CONTENT PRIORITIES

Different people have different expectations – some people want to see more soaps and reality TV shows while others want more news and documentaries.

Q18. SHOWCARD H (R) I am now going to read out to you a number of different choices relating to the main TV channels, BBC One, BBC Two, STV, Channel 4 and Five. For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see... READ OUT STATEMENTS A AND B – SINGLE CODE

|   |   |   |
|---|---|---|
| A | <b>A wide variety of different programme types, for example news, sports, documentaries, entertainment, religious, and the arts</b> | 1 |
| B | <b>More of the popular entertainment programmes that most people want to watch</b>  | 2 |
|   | <b>No preference</b>  | 3 |
|   | Don't know  | 4 |

(37)

Q19. SHOWCARD I (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |   |   |
|---|---|---|
| A | <b>TV programmes that reflect the needs and concerns of different communities within the UK (religious, regional or national, and ethnic)</b> | 1 |
| B | <b>TV programmes that reflect the needs and concerns of the UK as a whole</b>   | 2 |
|   | <b>No preference</b>  | 3 |
|   | Don't know  | 4 |

(38)

Q20. SHOWCARD J (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |   |   |
|---|---|---|
| A | <b>The best TV programmes from the USA, Europe, Australia and other countries</b> | 1 |
| B | <b>A high proportion of programmes made in the UK</b>                             | 2 |
|   | <b>No preference</b>  | 3 |
|   | Don't know  | 4 |

(39)

Q21. SHOWCARD K (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |  |   |
|---|--|---|
| A | <b>Lots of original and experimental programme ideas</b> | 1 |
| B | <b>More of people's tried and tested favourites</b>      | 2 |
|   | <b>No preference</b>                                     | 3 |
|   | Don't know   | 4 |

(40)

Q22. SHOWCARD L (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |  |   |
|---|--|---|
| A | <b>The main channels should provide programmes that are targeted at mass audiences</b>                                       | 1 |
| B | <b>The main channels should provide a range of programmes that are targeted at a wide range of different audience groups</b> | 2 |
|   | <b>No preference</b>   | 3 |
|   | Don't know   | 4 |

(41)



|   |
|---|
| GENERAL VIEWS ABOUT PARTICULAR CHANNELS |
|---|

I'd now like to ask you some questions about specific TV channels – BBC, STV, Channel 4 and Five.

Q23 SHOWCARD M (R) To what extent do you agree or disagree with each of the following statements about the BBC's television and internet services? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-F AND ROTATE ORDER, TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neither<br>agree<br>nor dis-<br>agree | Disagre<br>e | Disagree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|---------------------------------------|--------------|----------------------|---------------|------|
| <input type="checkbox"/> | a. The BBC should have a responsibility to set high standards  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (42) |
|                          | b. Given it receives public funding via the licence fee, the BBC should have special responsibilities to show programmes which commercial broadcasters don't | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (43) |
|                          | c. As licence fee payers, we are entitled to expect the BBC to provide more programmes that suit our tastes and interests than other broadcasters            | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (44) |
| <input type="checkbox"/> | d. It is important for the BBC to show a high proportion of programmes which reflect life in the UK  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (45) |
|                          | e. It's important for the BBC to keep up with new technology, for example, by allowing people to download its programmes onto their computers                | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (46) |
| <input type="checkbox"/> | f. The BBC's website is a useful source of information about my local area and region  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (47) |

|          |
|----------|
| SKIP COL |
|----------|

|    |
|----|
| 48 |
|----|

Q24 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about STV? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-H AND ROTATE ORDER. TICK START

|                          |  | Agree<br>strongly | Agree | Neither<br>agree<br>nor<br>dis-<br>agree | Disagree | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-------------------|-------|--|----------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. STV should concentrate on popular entertainment programmes, drama and soaps, rather than try to do everything                   | 1                 | 2     | 3  | 4        | 5                         | 6             | (49) |
|                          | b. It is important for STV to show a range of programmes about and made for people in Scotland aside from news and current affairs | 1                 | 2     | 3  | 4        | 5                         | 6             | (50) |
|                          | c. STV should be free to do whatever it feels it needs to do so that it can continue to attract a large audience                   | 1                 | 2     | 3  | 4        | 5                         | 6             | (51) |
| <input type="checkbox"/> | d. STV should show children's programmes that reflect life in the UK   | 1                 | 2     | 3  | 4        | 5                         | 6             | (52) |
|                          | e. STV should show more serious documentaries and current affairs at peak times (between 6pm-10.30pm)                              | 1                 | 2     | 3  | 4        | 5                         | 6             | (53) |
|                          | f. It is important for STV to show a high proportion of programmes that reflect life in the UK                                     | 1                 | 2     | 3  | 4        | 5                         | 6             | (54) |
| <input type="checkbox"/> | g. It is important for STV to show programmes that are made in a variety of different parts of the UK                              | 1                 | 2     | 3  | 4        | 5                         | 6             | (55) |
|                          | h. STV's website is a useful source of information about my local area and region  | 1                 | 2     | 3  | 4        | 5                         | 6             | (56) |

Q25

SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Channel 4? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-K AND ROTATE ORDER. TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|---|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Channel 4 does a good job of catering for audiences that other channels don't cater for   | 1                     | 2     | 3   | 4            | 5                         | 6             | (57) |
|                          | b. Channel 4 is noticeably more innovative and risk-taking in its programmes than the other main TV channels   | 1                     | 2     | 3   | 4            | 5                         | 6             | (58) |
|                          | c. Channel 4 should be challenging orthodox views and standards even if this means offending some people   | 1                     | 2     | 3   | 4            | 5                         | 6             | (59) |
|                          | d. It is important for Channel 4 to show a high proportion of programmes that reflect life in the UK   | 1                     | 2     | 3   | 4            | 5                         | 6             | (60) |
|                          | e. Channel 4 takes a different approach to subjects as compared to other channels  | 1                     | 2     | 3   | 4            | 5                         | 6             | (61) |
| <input type="checkbox"/> | f. Channel 4 should show children's programmes that reflect life in the UK   | 1                     | 2     | 3   | 4            | 5                         | 6             | (62) |
|                          | g. Channel 4 should show programmes for teenagers that reflect life in the UK  | 1                     | 2     | 3   | 4            | 5                         | 6             | (63) |
|                          | h. It is important for Channel 4 to show programmes that get people interested in learning more  | 1                     | 2     | 3   | 4            | 5                         | 6             | (64) |
|                          | i. It is important for Channel 4 to show programmes for schools  | 1                     | 2     | 3   | 4            | 5                         | 6             | (65) |
|                          | j. It is important for Channel 4 to show programmes that reflect the needs of and concerns of different communities within the UK (for example, ethnic minority communities) | 1                     | 2     | 3   | 4            | 5                         | 6             | (66) |
| <input type="checkbox"/> | k. Channel 4's digital channels, such as E4, More 4 and Film4 aren't important – Channel 4 should just focus on its main channel   | 1                     | 2     | 3   | 4            | 5                         | 6             | (67) |

Q27 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Five (which used to be called Channel Five)? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-E AND ROTATE ORDER. TICK START

|                             |   | Agree<br>strongly | Agree | Neither<br>agree<br>nor<br>dis-<br>agree | Disagree | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|---|-------------------|-------|--|----------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | It is important for Five to show dramas that reflect life in the UK   | 1                 | 2     | 3  | 4        | 5                         | 6             | (11) |
| b.                          | It is important for Five to show a high proportion of programmes that reflect life in the UK                  | 1                 | 2     | 3  | 4        | 5                         | 6             | (12) |
| c.                          | It is important for Five to show children's programmes that reflect life in the UK                            | 1                 | 2     | 3  | 4        | 5                         | 6             | (13) |
| <input type="checkbox"/> d. | It is important for Five to show news programmes  | 1                 | 2     | 3  | 4        | 5                         | 6             | (14) |
| e.                          | Five's digital channels (Five US and Five Life) aren't important – Five should just focus on its main channel | 1                 | 2     | 3  | 4        | 5                         | 6             | (15) |

Q28 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Teletext (that is, the text pages on STV and Channel 4, not text services on other channels such as Ceefax on the BBC)? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND ROTATE ORDER. TICK START

|                             |   | Agree<br>strongly | Agree | Neither<br>agree<br>nor<br>dis-<br>agree | Disagree | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|---|-------------------|-------|--|----------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | It is important for Teletext to provide news  | 1                 | 2     | 3  | 4        | 5                         | 6             | (16) |
| b.                          | It is important for Teletext to provide current affairs                                       | 1                 | 2     | 3  | 4        | 5                         | 6             | (17) |
| <input type="checkbox"/> c. | It is important for Teletext to provide news about and made for people in Scotland            | 1                 | 2     | 3  | 4        | 5                         | 6             | (18) |
| d.                          | It is important for Teletext to provide current affairs about and made for people in Scotland | 1                 | 2     | 3  | 4        | 5                         | 6             | (19) |

# GENERAL VIEWS ABOUT PROGRAMME TYPES

Thank you for all your opinions so far about the quality of television. In this section of the questionnaire, we would like to ask your views about different types of programmes that are shown on television.

Q29 SHOWCARD N (R) From the following list, which are the five programme types you consider to be most valuable to you and your family personally on the main TV channels? You can pick up to five that are most important to you. CODE UP TO 5 ONLY

Q30 SHOWCARD N (R) AGAIN The previous question asked you which programme types were important to you personally. Now I would like you to think about how important these programmes are for the good of society as a whole. For example, you may personally think soaps are not important, but could still think they are important to society as a useful way of airing debates about current issues. So looking at the same list of programme types, please tell me which five you think are the most important for the main TV channels to provide for the good of society as whole. Again, you can pick up to five that you think are the most important. CODE UP TO 5 ONLY

Q31 SHOWCARD N (R) AGAIN Now thinking about programmes that are made in the UK. For which of the following do you think it is most important to be made in the UK and reflect life in the UK? Again, you can pick up to five that you think are the most important. CODE UP TO 5 ONLY

|   |  | Q29<br>(20) | Q30<br>(22) | Q31<br>(24) |
|---|--|-------------|-------------|-------------|
| A | News   | 1           | 1           | 1           |
| B | Current Affairs programme such as<br>Tonight with Trevor McDonald and<br>Panorama  | 2           | 2           | 2           |
| C | Arts and classical music   | 3           | 3           | 3           |
| D | Children's   | 4           | 4           | 4           |
| E | Religious  | 5           | 5           | 5           |
| F | Serious Factual, including history,<br>nature or science programmes  | 6           | 6           | 6           |
| G | Other factual programmes including<br>hobbies, leisure and consumer<br>affairs e.g. Masterchef, Traffic Cops,<br>and The Gadget Show           | 7           | 7           | 7           |
| H | Programmes of an educational<br>nature   | 8           | 8           | 8           |
| I | Soaps  | 9           | 9           | 9           |
| J | Drama  | 0           | 0           | 0           |
| K | Films  | X           | X           | X           |
| L | Sport  | Y           | Y           | Y           |
|   |  | (21)        | (23)        | (25)        |
| M | Entertainment and contemporary<br>music e.g My Family, Strictly Come<br>Dancing and X Factor   | 1           | 1           | 1           |
| N | Comedy   | 2           | 2           | 2           |
| O | <b>1.1.1.6 News about and made<br/>for people in Scotland</b>  | 3           | 3           | 3           |
| P | Current affairs about and made for<br>people in Scotland e.g. Newsnight<br>Scotland and Politics Now   | 4           | 4           | 4           |
| Q | Aside from news and current affairs,<br>other programmes about and made<br>for people in Scotland e.g. Still<br>Game, River City and Scotsport | 5           | 5           | 5           |
|   | Other (please write in and code 6)   | 6           |             |             |
|   |  |             | 6           |             |
|   |  |             |             | 6           |

|  |  |   |   |   |         |
|--|--|---|---|---|---------|
|  | None of these  | 7 | 7 | 7 |         |
|  | Don't know   | 8 | 8 | 8 | (20-25) |
| <div> <div>DETAILED VIEWS TOWARDS GENRES ON INDIVIDUAL CHANNELS</div> </div> |  |   |   |   |         |
| Q32  | <p><b>SHOWCARD O (R) I'd now like you to think about the types of programmes that TV channels provide. Some people think that there should be rules to make TV channels provide certain types of programmes, such as news, children's programmes, religious programmes, and programmes about and made for people in Scotland. Other people say that it should be left for TV channels to decide what to show. Which of these statements is closest to your own views overall? SINGLE CODE ONLY</b></p> |   |   |   |         |
| A  | There should be rules to make <u>all</u> TV channels (that is the main TV channels and digital channels) provide certain types of programmes such as news, children's programmes, religious programmes and programmes about Scotland   | 1 |   |   |         |
| B  | There should be rules to make <u>the main</u> TV channels (ie BBC One, BBC Two, STV, Channel Four and Five) provide certain types of programmes such as news, children's programmes, religious programmes and programmes about Scotland  | 2 |   |   |         |
| C  | There should be rules just to make the <u>BBC</u> provide certain types of programmes such as news, children's programmes, religious programmes and programmes about Scotland  | 3 |   |   |         |
| D  | All TV channels should be free to decide for themselves what types of programmes they broadcast  | 4 |   |   |         |
|  | Don't know   | 5 |   |   | (26)    |

INTERVIEWER: FOR Q33-35, READ OUT EACH QUESTION IN TURN FOR EACH GENRE – EG READ OUT Q33 FOR NEWS, Q34 FOR NEWS, Q35 FOR NEWS, THEN Q33 FOR CURRENT AFFAIRS, Q34 FOR CURRENT AFFAIRS, Q35 FOR CURRENT AFFAIRS, AND SO ON. ROTATE THE ORDER IN WHICH YOU ASK ABOUT EACH GENRE – IE DO NOT START WITH NEWS EACH TIME – AND TICK START. THE RESPONDENT SHOULD KEEP HOLD OF SHOWCARD P (R) THROUGHOUT THIS SECTION.

- Q33 SHOWCARD P (R) **The earlier questions asked you about the types of programmes you thought were important to you personally and for the good of society as a whole. Still thinking about the good of society, I now want you to think about how important it is that the main TV channels as a whole provide certain types of programme. So, for [READ OUT PROGRAMME TYPE], how important, if at all, do you think it is that these programmes are shown on the main TV channels as a whole?**  
SINGLE CODE ONLY
- Q34 SHOWCARD P (R) AGAIN **And how important, if at all, do you think it is that [READ OUT PROGRAMME TYPE] is shown on more than one of the main TV channels?**  
SINGLE CODE ONLY
- Q35 **And still thinking about [READ OUT PROGRAMME TYPE], please tell me whether you think there should be more, less or about the same amount of these types of programmes shown on the main TV channels than there is now?** SINGLE CODE ONLY

REPEAT Q33-35 FOR EACH PROGRAMME TYPE A-P BELOW

**A News**

|   | Very<br>import<br>ant | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (27) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (28) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (29) |

**B Current affairs**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (30) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (31) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (32) |

|   |                       |                        |                               |                          |                         |               |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| <b>C      News about and made for people in Scotland</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (33) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                 | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (34) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (35) |
| <b>D      Current affairs about and made for people in Scotland</b>                                       |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (36) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                 | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (37) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (38) |
| <b>E      Aside from news and current affairs, other programmes about and made for people in Scotland</b> |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (39) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                 | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (40) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (41) |
| <b>F      Programmes that are made in the UK and reflect life in the UK</b>                               |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (42) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                 | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (43) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (44) |



|   |                       |                        |                               |                          |                         |               |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| <b>G</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Programmes that take place in different parts of the UK</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (45) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (46) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (47) |
| <b>H</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Children's programmes that reflect life in the UK</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (48) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (49) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (50) |
| <b>I</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Serious factual programmes for example, about nature, arts, science or history that are made in the UK</b> |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (51) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (52) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (53) |
| <b>J</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Dramas that reflect life in the UK</b>   |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (54) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (55) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (56) |

|        |  |                       |                        |                          |                          |                         |               |
|--------|--|-----------------------|------------------------|--------------------------|--------------------------|-------------------------|---------------|
| K<br>□ | <b>Comedies and sitcoms that are made in the UK</b>                                      |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (57)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (58)        |
| L      |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (59)          |
|        | <b>Programmes that get people interested in learning more about different topics</b>     |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
| M      | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (60)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (61)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (62)          |
| N      | <b>Religious programmes that are made in the UK</b>                                      |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (63)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (64)        |
| N      |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (65)          |
|        | <b>Programmes that appeal to a wide range of different cultural tastes and interests</b> |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
| N      | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (66)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (67)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (68)          |

|        |    |
|--------|----|
| CARD 5 | 10 |
|--------|----|

|          |       |
|----------|-------|
| SKIP COL | 11-13 |
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○ **Programmes that include people from different ethnic minority groups**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|--------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (14) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (15) |
|   | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |      |
| Q35 More, less or about the same amount on the main TV channels?          | 1                     | 2                      | 3                        | 4                        |                         |               | (16) |

P **Additional digital channels like BBC Three, E4, Five Life and ITV2**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|--------------------------|--------------------------|-------------------------|---------------|------|
| INTERVIEWER READ OUT<br>QUESTION WORDING AS SLIGHTLY<br>DIFFERENT                               |                       |                        |                          |                          |                         |               |      |
| Q33 Important that provided by the main television broadcasters                                 | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (17) |
| Q34 Important that <u>more than one</u> of the main television broadcasters provides them?      | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (18) |
|   | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |      |
| Q35 More, less or about the same amount provided by the main TV broadcasters than there is now? | 1                     | 2                      | 3                        | 4                        |                         |               | (19) |

Q36 SHOWCARD P (R) AGAIN **How important, if at all, is it that the main television channels as a whole provide...**

|    |   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|----|---|-----------------------|------------------------|------------------|--------------------------|-------------------------|---------------|------|
| a. | <b>Websites that provide additional content about different topics including news and entertainment</b> | 1                     | 2                      | 3                | 4                        | 5                       | 6             | (20) |
| b. | <b>Websites that allow you to watch TV programmes when you want to watch them</b>                       | 1                     | 2                      | 3                | 4                        | 5                       | 6             | (21) |

**I'd now like you to think about news and current affairs on the main TV channels as well as digital channels and the internet.**

Q37 SHOWCARD Q (R) **To what extent do you agree or disagree with each of the following statements about news?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-C AND ROTATE ORDER – TICK START

|                             |   | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | <b>It is important for each of the main TV channels to have at least one news programme during peak viewing hours (6pm-10.30pm)</b>     | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (22) |
| b.                          | <b>Now that there are dedicated digital news channels available, there is less of a need for news bulletins on the main TV channels</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (23) |
| <input type="checkbox"/> c. | <b>The internet is a better source of news than the main TV channels</b>  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (24) |

Q38 SHOWCARD Q (R) AGAIN **To what extent do you agree or disagree with each of the following statements on information about current affairs programmes such as Tonight with Trevor McDonald and Panorama?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND REVERSE ORDER – TICK START

|                             |  | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | <b>The main TV channels shouldn't be made to show current affairs programmes, there's plenty of choice on the digital channels</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (25) |
| <input type="checkbox"/> b. | <b>The internet is a better source of information about current affairs than the main TV channels</b>                              | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (26) |

I'd now like you to think about news about and made for people in Scotland.

Q39 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about news about and made for people in Scotland? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Television is an important source of news about Scotland   | 1                     | 2     | 3  | 4            | 5                         | 6             | (27) |
|                          | b. It is important for STV as well as the BBC to show news programmes about Scotland  | 1                     | 2     | 3  | 4            | 5                         | 6             | (28) |
| <input type="checkbox"/> | c. News about Scotland is of a generally high standard  | 1                     | 2     | 3  | 4            | 5                         | 6             | (29) |
|                          | d. The main TV channels shouldn't be made to show news programmes about Scotland, there's plenty of news on the internet about Scotland | 1                     | 2     | 3  | 4            | 5                         | 6             | (30) |

Q40 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about programmes about and made for people in Scotland aside from news and current affairs? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS (A-F) AND ROTATE ORDER – TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Other than the news and current affairs, programmes about Scotland are of no interest to me | 1                     | 2     | 3  | 4            | 5                         | 6             | (31) |
|                          | b. It is important to show programmes that take place in Scotland                              | 1                     | 2     | 3  | 4            | 5                         | 6             | (32) |
| <input type="checkbox"/> | c. Broadcasters shouldn't be made to show set amounts of programmes about Scotland             | 1                     | 2     | 3  | 4            | 5                         | 6             | (33) |
|                          | ASK ONLY IN NORTHERN IRELAND   |                       |       |  |              |                           |               |      |
| d.                       |  |                       |       |  |              |                           |               | (34) |
| e.                       |  |                       |       |  |              |                           |               | (35) |
| f.                       | ASK ONLY IN SCOTLAND<br>It is important that some programmes shown in Scotland are in Gaelic   | 1                     | 2     | 3  | 4            | 5                         | 6             | (36) |
| g.                       | ASK ONLY IN WALES  |                       |       |  |              |                           |               | (37) |

ASK ALL

I'd now like to you to think about how you find out information about your local area.

Q41 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about information about your local area? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A AND B AND REVERSE ORDER – TICK BOX START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a | 1                     | 2     | 3  | 4            | 5                         | 6             | (38) |
|                          |   |                       |       |  |              |                           |               |      |
| <input type="checkbox"/> | b | 1                     | 2     | 3  | 4            | 5                         | 6             | (39) |
|                          |   |                       |       |  |              |                           |               |      |

I'd now like you to think about children's programmes on television.

Q42 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree the following statements about children's programmes on television? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS AND REVERSE ORDER – TICK BOX START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a | 1                     | 2     | 3  | 4            | 5                         | 6             | (40) |
|                          |   |                       |       |  |              |                           |               |      |
|                          | b | 1                     | 2     | 3  | 4            | 5                         | 6             | (41) |
|                          |   |                       |       |  |              |                           |               |      |
|                          | c | 1                     | 2     | 3  | 4            | 5                         | 6             | (42) |
|                          |   |                       |       |  |              |                           |               |      |
| <input type="checkbox"/> | d | 1                     | 2     | 3  | 4            | 5                         | 6             | (43) |
|                          |   |                       |       |  |              |                           |               |      |

Q43

SHOWCARD R (R) In the future, it may be the case that the main TV channels may not be able to provide all of the types of content that we have been talking about. For each of the content types that I'm about to read out, please can you tell me which of these statements is closest to your views? If you agree with statements B, C, and D please say so. CAN MULTICODE B, C AND D (DIGITAL CHANNELS AND INTERNET) OTHERWISE SINGLE CODE. READ OUT STATEMENTS A-M AND ROTATE ORDER – TICK BOX START

|                          |    | A) This needs to be shown on the main TV channels  | B) This doesn't need to be shown on the main TV channels so long as people can get it on digital channels provided by the main TV broadcasters (e.g. BBC Three, E4, Five Life, ITV2.) | C) This doesn't need to be shown on the main TV channels as the other digital channels provide this type of content (e.g. Sky One, Sky News, Living, Sky Sports, Sky Movies) | D) This doesn't need to be shown on the main TV channels so long as people can get this type of content on the internet | Don't know |   |      |
|--------------------------|----|--|---|--|---|------------|---|------|
| <input type="checkbox"/> | a. | News   | 1   | 2  | 3   | 4          | 5 | (44) |
|                          | b. | Current affairs  | 1   | 2  | 3   | 4          | 5 | (45) |
|                          | c. | News and information about and made for people in Scotland                                   | 1   | 2  | 3   | 4          | 5 | (46) |
|                          | d. | News and information about your local area   | 1   | 2  | 3   | 4          | 5 | (47) |
|                          | e. | Children's programmes that reflect life in the UK  | 1   | 2  | 3   | 4          | 5 | (48) |
| <input type="checkbox"/> | f. | Serious factual programmes (for example, about nature, science or history)                   | 1   | 2  | 3   | 4          | 5 | (49) |
|                          | g. | Drama that reflects life in the UK   | 1   | 2  | 3   | 4          | 5 | (50) |
|                          | h. | Programmes for schools (for example, BBC Learning Zone and Channel 4 Programmes for Schools) | 1   | 2  | 3   | 4          | 5 | (51) |
|                          | i. | Entertainment  | 1   | 2  | 3   | 4          | 5 | (52) |
|                          | j. | Sports   | 1   | 2  | 3   | 4          | 5 | (53) |
| <input type="checkbox"/> | k. | Programmes that get people interested in learning about different topics                     | 1   | 2  | 3   | 4          | 5 | (54) |



|    |  |   |   |   |   |   |      |
|----|--|---|---|---|---|---|------|
| l. | <b>Arts programmes made in the UK</b>      | 1 | 2 | 3 | 4 | 5 | (55) |
|    |  |   |   |   |   |   | )    |
| m. | <b>Religious programmes made in the UK</b> | 1 | 2 | 3 | 4 | 5 | (56) |
|    |  |   |   |   |   |   | )    |

Q44 SHOWCARD S (R) Finally, thinking about everything we have talked about today, how satisfied or dissatisfied are you with...? READ OUT A-D, SINGLE CODE ONLY

|   | Very<br>satisfied | Fairly<br>satisfied | Neither<br>/nor | Fairly<br>dissatisfied | Very<br>dissatisfied | Don't<br>know |          |
|---|-------------------|---------------------|-----------------|------------------------|----------------------|---------------|----------|
| a) The main TV channels   | 1                 | 2                   | 3               | 4                      | 5                    | 6             | (57<br>) |
| b) The digital channels provided by the main TV broadcasters – BBC Three, E4, Five Life, ITV2 and so on | 1                 | 2                   | 3               | 4                      | 5                    | 6             | (58<br>) |
| c) Other digital TV channels – eg Sky One, Sky News, Living, Sky Sports, Sky Movies and so on           | 1                 | 2                   | 3               | 4                      | 5                    | 6             | (59<br>) |
| d) All the TV that is available to you as a whole   | 1                 | 2                   | 3               | 4                      | 5                    | 6             | (60<br>) |

Thank you very much for your time – your views will make a difference to the future of television in the UK. I now just need to ask you some questions about yourself to help us analyse the results – PLEASE GO TO DEMOGRAPHICS

**THIS MUST BE THE LAST PAGE OF THE QUESTIONNAIRE AND MUST BE SINGLE SIDED**

Ipsos MORI/31644BB01  
1-5

Questionnaire No:

|           |    |
|-----------|----|
| Serial No |    |
| OUO (6-9) |    |
| CARD      | 10 |

**Ofcom PSB Survey – Scotland (Version 2)**  
**Final Questionnaire**

Interviewer Number:

-       
(11) (12) (13) (14) (15) (16) (11-16)

Name/Initial/Title: Mr/Mrs/Ms/Miss

Address:

Full Postcode

QTEL1 **Do you have a fixed line telephone at home which you use for incoming and outgoing voice calls?**

|                       |   |             |
|-----------------------|---|-------------|
| Yes                   | 1 | GO TO QTEL2 |
| WRITE IN Full tel. No |   |             |
| No                    | 2 |             |
| Refused               | 3 |             |
| Ex-directory          | 4 |             |

QTEL2 **ASK IF NO FIXED LINE/REFUSED/EX-DIRECTORY (CODES 2-4). OTHERS CLOSE**  
**Can I just check, do you have a mobile phone? IF YES ASK: Can I take the number please?**

|                       |   |
|-----------------------|---|
| Yes                   | 1 |
| WRITE IN Full tel. No |   |
| No                    | 2 |
| Refused               | 3 |

**IT IS VERY IMPORTANT THAT YOU FILL IN THE SAMPLE POINT NUMBER, QUESTIONNAIRE NUMBER AND INTERVIEWER NUMBER ON BOTH THE FRONT AND BACK PAGE OF THE QUESTIONNAIRE.**

Please look on the intranet under documents/data protection for examples of agreement to re-contact respondents and consent forms

**Ofcom PSB Survey – Northern Ireland (Version 2)**  
**Final Questionnaire**

Sample Point Number:

Sample point name:

**SECTION A: DEMOGRAPHICS**

**Sampling Point Summary:**

**CABLE (SINGLE CODE)**

|                    |   |      |
|--------------------|---|------|
| Cable Coverage     | 1 |      |
| Non-Cable Coverage | 2 | (11) |

**URBAN/RURAL (SINGLE CODE)**

|                                |   |      |
|--------------------------------|---|------|
| Cities/large towns – urban- GB | 1 |      |
| Medium-size towns – urban- GB  | 2 |      |
| Small towns – urban- GB        | 3 |      |
| Rural - GB                     | 4 |      |
| Urban - NI                     | 5 |      |
| Rural - NI                     | 6 | (12) |

**DEPRIVATION (SINGLE CODE )**

|                    |   |      |
|--------------------|---|------|
| Low Deprivation    | 1 |      |
| Medium Deprivation | 2 |      |
| High Deprivation   | 3 | (13) |

**GEOGRAPHIC AREA (Government Region) (SINGLE CODE)**

|                    |   |      |
|--------------------|---|------|
| London             | 1 |      |
| South East         | 2 |      |
| South West         | 3 |      |
| East Midlands      | 4 |      |
| West Midlands      | 5 |      |
| North East         | 6 |      |
| North West         | 7 |      |
| East England       | 8 |      |
| Yorkshire & Humber | 9 |      |
| Scotland           | 0 |      |
| Wales              | X |      |
| Northern Ireland   | Y | (14) |

**QA Gender**

|        |   |      |
|--------|---|------|
| Male   | 1 |      |
| Female | 2 | (15) |

WRITE IN & CODE EXACT AGE

QB    **Exact**          
**Age**                      (16)              (17)

|  |       |   |      |
|--|-------|---|------|
|  | 16-17 | 1 |      |
|  | 18-24 | 2 |      |
|  | 25-34 | 3 |      |
|  | 35-44 | 4 |      |
|  | 45-54 | 5 |      |
|  | 55-64 | 6 |      |
|  | 65-74 | 7 |      |
|  | 75+   | 8 | (18) |

### Interviewer Declaration

I confirm that I have carried out this Interview face-to-face with the named person of the address attached and that I asked all the relevant questions fully and recorded the answers in conformance with the survey specification and within the MRS Code of Conduct and the Data Protection Act 1998.

Signature: .....

Interviewer Name (CAPS): .....

.....

Interviewer Number:

-                   
 (19)    (20)    (21)    (22)    (23)    (24)              (19-24)

Day of Interview    1    2    3    4    5    6    7  
                             (Mon)    (Thur)    (Sun)    (25)

Date of Interview:      /   /07    (26-

Length of Interview:      (minutes)    (30-

**QC Respondent is: SINGLE  
CODE**

|   |   |
|---|---|
| Working full-time (30hrs/wk+)   | 1 |
| Working part-time (8-29hrs/wk)  | 2 |
| Not working<br>(i.e. under 8hrs/week) retired   | 3 |
| Not working<br>(i.e. under 8hrs/week)<br>unemployed (registered/not<br>registered but looking for work) | 4 |
| Not working<br>(i.e. under 8hrs/week)<br>student  | 5 |
| Not working<br>(i.e. under 8hrs/week)<br>housewife /disabled /other                                     | 6 |
| Don't know  | 7 |

(32)

**QD SHOWCARD T Which of the groups  
on this card, if any, would you say you  
belong to? SINGLE CODE ONLY**

|  |      |
|--|------|
| <b>WHITE</b>                             | (33) |
| British                                  | 1    |
| Irish                                    | 2    |
| Any other white background               | 3    |
| <b>MIXED</b>                             |      |
| White and Black Caribbean                | 4    |
| White and Black African                  | 5    |
| White and Asian                          | 6    |
| Any other mixed background               | 7    |
| <b>ASIAN OR ASIAN BRITISH</b>            |      |
| Indian                                   | 8    |
| Pakistani                                | 9    |
| Bangladeshi                              | 0    |
| Any other Asian background               | X    |
| <b>BLACK OR BLACK BRITISH</b>            |      |
| Caribbean                                | Y    |
|  | (34) |
| African                                  | 1    |
| Any other black background               | 2    |
| <b>CHINESE OR OTHER ETHNIC<br/>GROUP</b> |      |
| Chinese                                  | 3    |
| Any other background                     | 4    |
| Refused                                  | 5    |

**QE Home is: SINGLE  
CODE**

|   |   |
|---|---|
| Being bought on mortgage                                  | 1 |
| Owned outright by household                               | 2 |
| Rented from Local Authority/<br>Housing Association/Trust | 3 |
| Rented from private landlord                              | 4 |
| Other   | 5 |
| Don't know  | 6 |

(35)

**QF Occupation of Chief Income Earner**

Position/rank/grade

Industry/type of company

Quals/degree/apprenticeship

Number of staff responsible for

REMEMBER TO PROBE FULLY AND CODE  
FROM ABOVE

**QG Class**

|    |   |
|----|---|
| A  | 1 |
| B  | 2 |
| C1 | 3 |
| C2 | 4 |
| D  | 5 |
| E  | 6 |

(36)

**QH Total number in household (including  
respondent and any children)**

(37)

**Number of children in household (Under 16)**

(38)

ASK IF HAVE AT LEAST ONE CHILD IN HH  
(UNDER 16)

QI **How old is/are your child/ren?** MULTICODE  
OK

|            |      |
|------------|------|
|            | (39) |
| 1 or under | 1    |
| 2          | 2    |
| 3          | 3    |
| 4          | 4    |
| 5          | 5    |
| 6          | 6    |
| 7          | 7    |
| 8          | 8    |
| 8          | 9    |
| 10         | 0    |
| 11         | X    |
| 12         | Y    |
|            | (40) |
| 13         | 1    |
| 14         | 2    |
| 15         | 3    |

(39-40)

ASK ALL WITH CHILDREN UNDER 16 IN THE  
HOUSEHOLD

QJ **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 |

(41)

ASK ALL

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

YOU OTHER  
H/HOLD  
MEMBER

|            |      |      |
|------------|------|------|
|            | (42) | (43) |
| Yes        | 1    | 1    |
| No         | 2    | 2    |
| Don't know | 3    | 3    |

(42-43)

ASK ALL

QL **SHOWCARD U (R) Would you please  
tell me the letter from this card for  
the group in which you would place  
your total household income from  
all sources before tax and  
deductions.** REASSURE ABOUT  
CONFIDENTIALITY

|   |                   |      |      |
|---|-------------------|------|------|
|   |                   | (44) |      |
| B | Less than £11,500 | 1    |      |
| E | £11,500 - £17,499 | 2    |      |
| D | £17,500 - £29,999 | 3    |      |
| A | £30,000 - £49,999 | 4    |      |
| C | £50,000 and over  | 5    |      |
|   | Refused           | 6    |      |
|   | Don't know        | 7    | (44) |

(44)

#### MOBILE PHONES

QM **Do you personally use a  
mobile phone** SINGLE CODE

|            |   |
|------------|---|
| Yes        | 1 |
| No         | 2 |
| Don't know | 3 |

(45)

#### LANGUAGE

QN **Do you speak or have an  
understanding of...?** ONLY READ OUT A + B

|    |                   |   |
|----|-------------------|---|
| a. | Irish             | 1 |
| b. | Ulster Scots      | 2 |
| c. | Welsh             | 3 |
| d. | Gaelic            | 4 |
|    | None of the above | 5 |
|    | Don't know        | 6 |

(46)

INTERVIEWER RECORD END TIME AFTER DEMOGRAPHICS

Hours Mins

INTERVIEWER RECORD START TIME

|                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Hours                |                      | Mins                 |                      |

**INTRODUCTION/CONFIDENTIALITY**

Good morning, afternoon, evening. My name is ..... from Ipsos MORI, the research organisation, and we are carrying out a survey for Ofcom, the independent body set up by the Government to oversee broadcasting and telecommunications in the UK. We'd like you to answer some questions about television in the UK – what's good and bad about it, and which channels should show which type of programmes. This is your opportunity for you to help shape the future of television. The survey will take about 35 minutes. We also want to find out your views about the internet and other types of media (such as radio, newspapers etc).

Initially, we would like to ask you some broad questions about your attitudes towards television and the media in general.

**I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual or address in the results.**

**TELEVISION VIEWING**

ASK ALL

Q52. **First of all, on an average day how many hours would you say you watch TV? SINGLE CODE**

|                     |   |
|---------------------|---|
| Up to about an hour | 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 |

(11)

Q53. **SHOWCARD A (R) Which, if any, of these types of television does your household receive at the moment? MULTICODE OK**

|   |   |   |          |
|---|---|---|----------|
| A | Only the main channels (BBC One, BBC Two, UTV, Channel 4 and Five)  | 1 | GO TO Q5 |
| B | Cable TV (through NTL / Telewest / Virgin Media)  | 2 | GO TO Q4 |
| C | Satellite TV (Sky)  | 3 | ASK Q3   |
| D | Satellite TV (Other)  | 4 |          |
| E | Freeview (through a set-top box or digital television set) with ONLY free channels  | 5 | GO TO Q4 |
| F | 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 |          |
| G | Digital TV via a broadband DSL line (from HomeChoice or Kingston Communications)  | 7 |          |
|   | Any other mention of Virgin   | 8 | GO TO Q5 |
|   | Other (please write in and code 9)  | 9 |          |



|                    |  |   |          |      |
|--------------------|--|---|----------|------|
|                    |  |   |          |      |
| No TV in household |  | 0 | GO TO Q7 |      |
| Don't know         |  | X | GO TO Q5 | (12) |

Q54. ASK THOSE WITH SATELLITE TV (CODES 3-4 AT Q2)

**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<br>(pay a monthly subscription fee) | 1 |
| Free-to-air services only (no<br>monthly subscription fee)        | 2 |
| Don't know  | 3 |

(13)

Q55. ASK THOSE WITH MULTICHANNEL TV (CODES 2-8 AT Q2)

**Does your household have a device that has a hard disc and allows you to pause, rewind and record live TV programmes? These are sometimes known as Sky +, V+, Tivo or Telewest drive. SINGLE CODE**

|            |   |
|------------|---|
| Yes        | 1 |
| No         | 2 |
| Don't know | 3 |

(14)

ASK ALL WITH TV IN HOUSEHOLD

Q56. SHOWCARD B (R) **Which of these television channels and services, if any, would you say you watch regularly? That is, a few times a week. MULTICODE OK**

|   |                                  |   |
|---|----------------------------------|---|
| A | BBC One                          | 1 |
| B | BBC Two                          | 2 |
| C | UTV                              | 3 |
| D | Channel 4                        | 4 |
| E | Five                             | 5 |
| F | Teletext or Ceefax               | 6 |
|   | <i>Spare line for Wales only</i> |   |
|   | None of them                     | 8 |
|   | Don't know                       | 9 |

(15)

Q57. SHOWCARD C (R) And which of the following types of programmes, if any, would you say you watch regularly on the main TV channels (that is BBC One, BBC Two, UTV, Channel 4 and Five? MULTICODE OK

|   |  |      |
|---|--|------|
|   |  | (16) |
| A | News   | 1    |
| B | Current Affairs programmes such as Tonight with Trevor McDonald and Panorama   | 2    |
| C | Arts and classical music   | 3    |
| D | Children's   | 4    |
| E | Religious  | 5    |
| F | Serious Factual, including history, nature or science programmes   | 6    |
| G | Other factual programmes including hobbies, leisure and consumer affairs e.g. Masterchef, Traffic Cops, and The Gadget Show                                    | 7    |
| H | Programmes of an educational nature  | 8    |
| I | Soaps  | 9    |
| J | Drama  | 0    |
| K | Films  | X    |
| L | Sport  | Y    |
|   |  | (17) |
| M | Entertainment and contemporary music e.g My Family, Strictly Come Dancing and X Factor   | 1    |
| N | Comedy   | 2    |
| O | <b>1.1.1.7 News about and made for people in Northern Ireland</b>  | 3    |
| P | Current affairs about and made for people in Northern Ireland e.g. Hearts and Minds and Insight  | 4    |
| Q | Aside from news and current affairs, other programmes about and made for people in Northern Ireland e.g. UTV Life, Derek's Dreams, Healy, UTV Sports on Sunday | 5    |
|   | Other  | 0    |
|   | None of these  | X    |
|   | Don't know   | Y    |

(16-17)

## INTERNET USAGE

**I would now like to ask you about the internet**

Q58. ASK ALL

**Do you personally use the internet? SINGLE CODE**

|            |   |           |
|------------|---|-----------|
| Yes        | 1 | ASK Q8    |
| No         | 2 | GO TO Q11 |
| Don't know | 3 |           |

(18)

Q59. ASK THOSE WITH INTERNET ACCESS (CODE 1 AT Q7)

**Where do you access the internet? MULTICODE OK**

|  |   |           |
|--|---|-----------|
| At home  | 1 | ASK Q9    |
| At work (out of home)  | 2 | GO TO Q10 |
| At a public place (Internet café,<br>library, by mobile phone, etc.) | 3 |           |
| At university / college  | 4 |           |
| At school  | 5 |           |
| Elsewhere (friends, relatives,<br>etc.)                              | 6 |           |
| Other  | 7 |           |
| Don't know   | 8 |           |

(19)

Q60. ASK THOSE WITH INTERNET ACCESS AT HOME (CODE 1 AT Q8)

**SHOWCARD D (R) And which of these methods does your household use to connect to the Internet at home? Just read out the letter or letters that apply. MULTICODE OK**

|   |   |   |
|---|---|---|
| A | Ordinary phone line – dial-up<br>access   | 1 |
| B | Broadband - high-speed access,<br>allowing you to make telephone<br>calls at the same time as using<br>the internet | 2 |
| C | Wireless access through a<br>wireless router, WIFI or portable<br>device  | 3 |
|   | Other (please write in and code<br>4)   | 4 |
|   | Don't know  | 5 |

(20)

Q61. ASK THOSE WITH ANY INTERNET ACCESS (CODE 1 AT Q7)

**How often do you tend to use the internet? SINGLE CODE ONLY**

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

(21)

# CROSS-PLATFORM PREFERENCES FOR DIFFERENT TYPES OF CONTENT

ASK ALL

Throughout this questionnaire, I am going to be asking you questions about the main TV channels. When I ask you about these, I am talking about the five main TV channels – BBC One, BBC Two, UTV, Channel 4, and Five

READ OUT a-e AND ROTATE ORDER LIST. TICK START.

Q62. SHOWCARD E (R) Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ... ?MULTICODE OK

Q63. And which of these different media would you say is your main source for... ?SINGLE CODE INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS.

|   |  | a.<br>Entertainment      |      | b.<br>News about<br>the UK |      | c.<br>News about<br>the World |      | d.<br>News about and<br>made for people in<br>Northern Ireland |      | e.<br>News about<br>your local<br>area |      |
|---|--|--------------------------|------|----------------------------|------|-------------------------------|------|--|------|--|------|
|   |  | ALL                      | MAIN | ALL                        | MAIN | ALL                           | MAIN | ALL  | MAIN | ALL                                    | MAIN |
|   | TICK START   | <input type="checkbox"/> |      | <input type="checkbox"/>   |      | <input type="checkbox"/>      |      | <input type="checkbox"/>                                       |      | <input type="checkbox"/>               |      |
|   |  | (22)                     | (24) | (26)                       | (28) | (30)                          | (32) | (34)   | (36) | (38)                                   | (40) |
| A | TV on the main channels  | 1                        | 1    | 1                          | 1    | 1                             | 1    | 1  | 1    | 1                                      | 1    |
| B | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2                        | 2    | 2                          | 2    | 2                             | 2    | 2  | 2    | 2                                      | 2    |
| C | Radio  | 3                        | 3    | 3                          | 3    | 3                             | 3    | 3  | 3    | 3                                      | 3    |
| D | Newspapers   | 4                        | 4    | 4                          | 4    | 4                             | 4    | 4  | 4    | 4                                      | 4    |
| E | Magazines  | 5                        | 5    | 5                          | 5    | 5                             | 5    | 5  | 5    | 5                                      | 5    |
| F | Books  | 6                        | 6    | 6                          | 6    | 6                             | 6    | 6  | 6    | 6                                      | 6    |
| G | Internet via pc or laptop  | 7                        | 7    | 7                          | 7    | 7                             | 7    | 7  | 7    | 7                                      | 7    |
| H | Teletext or Ceefax   | 8                        | 8    | 8                          | 8    | 8                             | 8    | 8  | 8    | 8                                      | 8    |
| I | Videos/DVDs  | 9                        | 9    | 9                          | 9    | 9                             | 9    | 9  | 9    | 9                                      | 9    |
| J | Computer games/games console   | 0                        | 0    | 0                          | 0    | 0                             | 0    | 0  | 0    | 0                                      | 0    |
|   | Other  | X                        | X    | X                          | X    | X                             | X    | X  | X    | X                                      | X    |
|   | I'm not interested in this   | Y                        | Y    | Y                          | Y    | Y                             | Y    | Y  | Y    | Y                                      | Y    |
|   |  | (23)                     | (25) | (27)                       | (29) | (31)                          | (33) | (35)   | (37) | (39)                                   | (41) |
|   | None   | 1                        | 1    | 1                          | 1    | 1                             | 1    | 1  | 1    | 1                                      | 1    |
|   | Don't know   | 2                        | 2    | 2                          | 2    | 2                             | 2    | 2  | 2    | 2                                      | 2    |

(22-41)

- Q11 READ OUT f - i AND ROTATE ORDER LIST. TICK START.  
SHOWCARD E (R) AGAIN Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for each of the following categories? MULTICODE OK
- Q12 And which of these different media would you say is your main source for...INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS. SINGLE CODE

|            |  | f.<br>Your<br>personal<br>interests<br>and<br>pastimes |      | g.<br>Knowledge<br>about<br>topics such<br>as arts,<br>science<br>nature or<br>history |      | h<br>Sports news<br>and<br>information |      | i<br>Finding out<br>about people<br>with <u>similar</u><br>interests to<br>your own |      |
|------------|--|--|------|--|------|--|------|---|------|
|            |  | ALL  | MAIN | ALL  | MAIN | ALL                                    | MAIN | ALL   | MAIN |
| TICK START |  | <input type="checkbox"/>                               |      |  |      | <input type="checkbox"/>               |      |   |      |
|            |  | (42)   | (44) | (46)   | (48) | (50)                                   | (52) | (54)  | (56) |
| A          | TV on the main channels  | 1  | 1    | 1  | 1    | 1                                      | 1    | 1   | 1    |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2  | 2    | 2  | 2    | 2                                      | 2    | 2   | 2    |
| C          | Radio  | 3  | 3    | 3  | 3    | 3                                      | 3    | 3   | 3    |
| D          | Newspapers   | 4  | 4    | 4  | 4    | 4                                      | 4    | 4   | 4    |
| E          | Magazines  | 5  | 5    | 5  | 5    | 5                                      | 5    | 5   | 5    |
| F          | Books  | 6  | 6    | 6  | 6    | 6                                      | 6    | 6   | 6    |
| G          | Internet via pc or laptop  | 7  | 7    | 7  | 7    | 7                                      | 7    | 7   | 7    |
| H          | Teletext or Ceefax   | 8  | 8    | 8  | 8    | 8                                      | 8    | 8   | 8    |
| I          | Videos/DVDs  | 9  | 9    | 9  | 9    | 9                                      | 9    | 9   | 9    |
| J          | Computer games/games console   | 0  | 0    | 0  | 0    | 0                                      | 0    | 0   | 0    |
|            | Other  | X  | X    | X  | X    | X                                      | X    | X   | X    |
|            | I'm not interested in this   | Y  | Y    | Y  | Y    | Y                                      | Y    | Y   | Y    |
|            |  | (43)   | (45) | (47)   | (49) | (51)                                   | (53) | (55)  | (57) |
|            | None   | 1  | 1    | 1  | 1    | 1                                      | 1    | 1   | 1    |
|            | Don't know   | 2  | 2    | 2  | 2    | 2                                      | 2    | 2   | 2    |

(42-57)

- Q11 READ OUT j - k AND ROTATE ORDER LIST. TICK START.  
SHOWCARD E (R) AGAIN Which of these different media available to you (such as television, radio, internet etc) would you say you use as a source for each of the following categories? MULTICODE OK
- Q12 And which of these different media would you say is your main source for...INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS. SINGLE CODE

|            |  | j<br>Finding about<br>people with<br>values and<br>lifestyles that<br>are <u>different</u><br>to your own |              | k<br>Discovering<br>new things          |              |
|------------|--|---|--------------|---|--------------|
|            |  | ALL<br><input type="checkbox"/><br>(58)   | MAIN<br>(60) | ALL<br><input type="checkbox"/><br>(62) | MAIN<br>(64) |
| TICK START |  |   |              |   |              |
| A          | TV on the main channels  | 1   | 1            | 1                                       | 1            |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2   | 2            | 2                                       | 2            |
| C          | Radio  | 3   | 3            | 3                                       | 3            |
| D          | Newspapers   | 4   | 4            | 4                                       | 4            |
| E          | Magazines  | 5   | 5            | 5                                       | 5            |
| F          | Books  | 6   | 6            | 6                                       | 6            |
| G          | Internet via pc or laptop  | 7   | 7            | 7                                       | 7            |
| H          | Teletext or Ceefax   | 8   | 8            | 8                                       | 8            |
| I          | Videos/DVDs  | 9   | 9            | 9                                       | 9            |
| J          | Computer games/ games console  | 0   | 0            | 0                                       | 0            |
|            | Other  | X   | X            | X                                       | X            |
|            | I'm not interested in this   | Y   | Y            | Y                                       | Y            |
|            |  | (59)  | (61)         | (63)                                    | (65)         |
|            | None   | 1   | 1            | 1                                       | 1            |
|            | Don't know   | 2   | 2            | 2                                       | 2            |

(58-65)

CARD 3

10

- Q64. SHOWCARD E (R) AGAIN And looking at this list again, which one of these, if any, do you think you would find it hardest to live without? SINGLE CODE ONLY

|   |  |      |
|---|--|------|
|   |  | (11) |
| A | TV on the main channels  | 1    |
| B | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2    |
| C | Radio  | 3    |
| D | Newspapers   | 4    |
| E | Magazines  | 5    |
| F | Books  | 7    |
| G | Internet via pc or laptop  | 8    |
| H | Teletext or Ceefax   | 9    |
| I | Videos/DVDs  | 0    |
| J | Computer games / games console   | X    |
|   | Other  | Y    |
|   |  | (12) |

|            |   |
|------------|---|
| None       | 1 |
| Don't know | 2 |

Q65. SHOWCARD F (R) **To what extent do you agree or disagree with each of the following statements about television?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-J AND ROTATE ORDER. TICK START

|                          |   | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--------------------------|---|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
| <input type="checkbox"/> | a. <b>As well as entertaining and informing people, television has an important social role to play</b>                                       | 1                     | 2     | 3  | 4             | 5                             | 6                 | (13) |
|                          | b. <b>Television should help to promote understanding and tolerance of different religions, cultures and lifestyles</b>                       | 1                     | 2     | 3  | 4             | 5                             | 6                 | (14) |
|                          | c. <b>Television's main role should be to provide entertainment rather than information or education</b>                                      | 1                     | 2     | 3  | 4             | 5                             | 6                 | (15) |
|                          | d. <b>I have personally learned useful things from watching television</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (16) |
|                          | e. <b>Television is very influential in shaping public opinion about political and other important issues</b>                                 | 1                     | 2     | 3  | 4             | 5                             | 6                 | (17) |
| <input type="checkbox"/> | f. <b>Television has an important role to play in making people interested in different subjects, like arts, nature, sciences and history</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (18) |
|                          | g. <b>It is important that television is available to everyone</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (19) |
|                          | h. <b>Television has an important role in helping children and teenagers understand life in the UK</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (20) |
| <input type="checkbox"/> | i. <b>With so many channels now available, it's hard to find what I want</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (21) |
|                          | j. <b>TV programmes sometimes change the way I think about things</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (22) |



Q66. SHOWCARD F (R) AGAIN **And to what extent do you agree or disagree with each of the following statements about the internet?** SINGLE CODE ONLY FOR EACH LINE.  
READ OUT STATEMENTS (A-I) AND (J-L) AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--------------------------|---|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
| <input type="checkbox"/> | a. <b>As well as entertaining and informing people, the internet has an important social role to play</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (23) |
|                          | b. <b>The internet should help to promote understanding and tolerance of different religions, cultures and lifestyles</b>                         | 1                     | 2     | 3  | 4             | 5                             | 6                 | (24) |
|                          | c. <b>The internet's main role should be to provide entertainment rather than information or education</b>  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (25) |
| <input type="checkbox"/> | d. <b>The internet is very influential in shaping public opinion about political and other important issues</b>                                   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (26) |
|                          | e. <b>The internet is a valuable source of information and learning</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (27) |
|                          | f. <b>The internet has an important role to play in making people interested in different subjects like the arts, nature, science and history</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (28) |
| <input type="checkbox"/> | g. <b>The internet has an important role to play in helping children and teenagers understand life in the UK</b>                                  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (29) |
|                          | h. <b>The internet is a valuable source of information and entertainment for children and teenagers</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (30) |
|                          | i. <b>It's important that the internet is available to everyone</b>   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (31) |

ASK J-L OF THOSE WITH INTERNET ACCESS. CODE 1 AT Q7.

|  |  | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--|--|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
|  | j. <b>With so many websites on the internet, it's hard to find what I want</b> | 1                     | 2     | 3  | 4             | 5                             | 6                 | (32) |
|  | k. <b>I have personally learned useful things from the internet</b>            | 1                     | 2     | 3  | 4             | 5                             | 6                 | (33) |
|  | l. <b>Websites sometimes change the way I think about things</b>               | 1                     | 2     | 3  | 4             | 5                             | 6                 | (34) |

Q67. ASK ALL **Thinking about the main TV channels, that is BBC One, BBC Two, UTV, Channel 4 and Five, would you say you are watching them more, less, or about the same as you were 4-5 years ago?** SINGLE CODE ONLY

|                |   |           |
|----------------|---|-----------|
| More           | 1 | GO TO Q18 |
| About the same | 2 |           |
| Less           | 3 | ASK Q17   |
| Don't know     | 4 | GO TO Q18 |

(35)

Q68. ASK THOSE WHO SAY THEY WATCH LESS TV. CODE 3 AT Q16. OTHERS GO TO Q18  
SHOWCARD G (R) **Could you say why it is you are watching them less than 4-5 years ago?** MULTICODE OK

|   |   |   |
|---|---|---|
| A | I am less interested in watching TV generally now   | 1 |
| B | I have less time to watch TV generally now because I am too busy or have had a change in my circumstances | 2 |
| C | I watch more of the main TV channels' digital channels instead – e.g. BBC Three, E4, Five Life, ITV2      | 3 |
| D | I watch more of other digital channels instead – e.g. Sky One, Sky News, Living, Sky Sports, Sky Movies   | 4 |
| E | I use the internet more instead of watching TV  | 5 |
| F | I play computer games more instead of watching TV   | 6 |
| G | I don't find the programmes as enjoyable/interesting as I used to do                                      | 7 |
| H | There are fewer programmes that appeal to my interests  | 8 |
|   | Other (please write in and code 9)  | 9 |
|   | Don't know  | 0 |

(36)

ASK ALL

## HARD CHOICES: CONTENT PRIORITIES

Different people have different expectations – some people want to see more soaps and reality TV while others want more news and documentaries.

Q18. SHOWCARD H (R) I am now going to read out to you a number of different choices relating to the main TV channels, BBC One, BBC Two, UTV, Channel 4 and Five. For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see... READ OUT STATEMENTS A AND B – SINGLE CODE

|   |  |   |
|---|--|---|
| A | <b>A wide variety of different programme types, for example, news, sports, documentaries, entertainment, religious, and the arts</b> | 1 |
| B | <b>More of the popular entertainment programmes that most people want to watch</b>   | 2 |
|   | <b>No preference</b>   | 3 |
|   | Don't know   | 4 |

(37)

Q19. SHOWCARD I (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |   |   |
|---|---|---|
| A | <b>TV programmes that reflect the needs and concerns of different communities within the UK (religious, regional or national, and ethnic)</b> | 1 |
| B | <b>TV programmes that reflect the needs and concerns of the UK as a whole</b>   | 2 |
|   | <b>No preference</b>  | 3 |
|   | Don't know  | 4 |

(38)

Q20. SHOWCARD J (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |   |   |
|---|---|---|
| A | <b>The best TV programmes from the USA, Europe, Australia and other countries</b> | 1 |
| B | <b>A high proportion of programmes made in the UK</b>                             | 2 |
|   | <b>No preference</b>  | 3 |
|   | Don't know  | 4 |

(39)

Q21. SHOWCARD K (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |  |   |
|---|--|---|
| A | <b>Lots of original and experimental programme ideas</b> | 1 |
| B | <b>More of people's tried and tested favourites</b>      | 2 |
|   | <b>No preference</b>                                     | 3 |
|   | Don't know   | 4 |

(40)

Q22. SHOWCARD L (R). READ OUT STATEMENTS A AND B – SINGLE CODE

|   |  |   |
|---|--|---|
| A | <b>The main channels should provide programmes that are targeted at mass audiences</b>                                       | 1 |
| B | <b>The main channels should provide a range of programmes that are targeted at a wide range of different audience groups</b> | 2 |
|   | <b>No preference</b>   | 3 |
|   | Don't know   | 4 |

(41)

|   |
|---|
| GENERAL VIEWS ABOUT PARTICULAR CHANNELS |
|---|

I'd now like to ask you some questions about specific TV channels – BBC, UTV, Channel 4 and Five.

Q23 SHOWCARD M (R) To what extent do you agree or disagree with each of the following statements about the BBC's television and internet services? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-F AND ROTATE ORDER, TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neither<br>agree<br>nor dis-<br>agree | Disagre<br>e | Disagree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|---------------------------------------|--------------|----------------------|---------------|------|
| <input type="checkbox"/> | a. The BBC should have a responsibility to set high standards  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (42) |
|                          | b. Given it receives public funding via the licence fee, the BBC should have special responsibilities to show programmes which commercial broadcasters don't | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (43) |
|                          | c. As licence fee payers, we are entitled to expect the BBC to provide more programmes that suit our tastes and interests than other broadcasters            | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (44) |
| <input type="checkbox"/> | d. It is important for the BBC to show a high proportion of programmes which reflect life in the UK  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (45) |
|                          | e. It's important for the BBC to keep up with new technology, for example, by allowing people to download its programmes onto their computers                | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (46) |
| <input type="checkbox"/> | f. The BBC's website is a useful source of information about my local area and region  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (47) |

|          |
|----------|
| SKIP COL |
|----------|

|    |
|----|
| 48 |
|----|

Q24 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about UTV? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-H AND ROTATE ORDER, TICK START

|                          |  | Agree<br>strongly | Agree | Neither<br>agree<br>nor<br>dis-<br>agree | Disagree | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-------------------|-------|--|----------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. UTV should concentrate on popular entertainment programmes, drama and soaps, rather than try to do everything                           | 1                 | 2     | 3  | 4        | 5                         | 6             | (49) |
|                          | b. It is important for UTV to show a range of programmes about and made for people in Northern Ireland aside from news and current affairs | 1                 | 2     | 3  | 4        | 5                         | 6             | (50) |
|                          | c. UTV should be free to do whatever it feels it needs to do so that it can continue to attract a large audience                           | 1                 | 2     | 3  | 4        | 5                         | 6             | (51) |
| <input type="checkbox"/> | d. UTV should show children's programmes that reflect life in the UK   | 1                 | 2     | 3  | 4        | 5                         | 6             | (52) |
|                          | e. UTV should show more serious documentaries and current affairs at peak times (between 6pm-10.30pm)                                      | 1                 | 2     | 3  | 4        | 5                         | 6             | (53) |
|                          | f. It is important for UTV to show a high proportion of programmes that reflect life in the UK   | 1                 | 2     | 3  | 4        | 5                         | 6             | (54) |
| <input type="checkbox"/> | g. It is important for UTV to show programmes that are made in a variety of different parts of the UK                                      | 1                 | 2     | 3  | 4        | 5                         | 6             | (55) |
|                          | h. UTV's website is a useful source of information about my local area and region  | 1                 | 2     | 3  | 4        | 5                         | 6             | (56) |

Q25

SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Channel 4? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-K AND ROTATE ORDER – TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|---|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Channel 4 does a good job of catering for audiences that other channels don't cater for   | 1                     | 2     | 3   | 4            | 5                         | 6             | (57) |
|                          | b. Channel 4 is noticeably more innovative and risk-taking in its programmes than the other main TV channels   | 1                     | 2     | 3   | 4            | 5                         | 6             | (58) |
|                          | c. Channel 4 should be challenging orthodox views and standards even if this means offending some people   | 1                     | 2     | 3   | 4            | 5                         | 6             | (59) |
|                          | d. It is important for Channel 4 to show a high proportion of programmes that reflect life in the UK   | 1                     | 2     | 3   | 4            | 5                         | 6             | (60) |
|                          | e. Channel 4 takes a different approach to subjects as compared to other channels  | 1                     | 2     | 3   | 4            | 5                         | 6             | (61) |
| <input type="checkbox"/> | f. Channel 4 should show children's programmes that reflect life in the UK   | 1                     | 2     | 3   | 4            | 5                         | 6             | (62) |
|                          | g. Channel 4 should show programmes for teenagers that reflect life in the UK  | 1                     | 2     | 3   | 4            | 5                         | 6             | (63) |
|                          | h. It is important for Channel 4 to show programmes that get people interested in learning more  | 1                     | 2     | 3   | 4            | 5                         | 6             | (64) |
|                          | i. It is important for Channel 4 to show programmes for schools  | 1                     | 2     | 3   | 4            | 5                         | 6             | (65) |
|                          | j. It is important for Channel 4 to show programmes that reflect the needs of and concerns of different communities within the UK (for example, ethnic minority communities) | 1                     | 2     | 3   | 4            | 5                         | 6             | (66) |
| <input type="checkbox"/> | k. Channel 4's digital channels, such as E4, More 4 and Film4 aren't important – Channel 4 should just focus on its main channel   | 1                     | 2     | 3   | 4            | 5                         | 6             | (67) |

Q27 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Five (which used to be called Channel Five)? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-E AND ROTATE ORDER, TICK START

|                             |   | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | It is important for Five to show dramas that reflect life in the UK   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (11) |
| b.                          | It is important for Five to show a high proportion of programmes that reflect life in the UK                  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (12) |
| c.                          | It is important for Five to show children's programmes that reflect life in the UK                            | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (13) |
| <input type="checkbox"/> d. | It is important for Five to show news programmes  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (14) |
| e.                          | Five's digital channels (Five US and Five Life) aren't important – Five should just focus on its main channel | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (15) |

Q28 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Teletext (that is, the text pages on UTV and Channel 4, not text services on other channels such as Ceefax on the BBC)? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND ROTATE ORDER, TICK START

|                             |   | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | It is important for Teletext to provide news  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (16) |
| b.                          | It is important for Teletext to provide current affairs   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (17) |
| <input type="checkbox"/> c. | It is important for Teletext to provide news about and made for people in Northern Ireland            | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (18) |
| d.                          | It is important for Teletext to provide current affairs about and made for people in Northern Ireland | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (19) |

## GENERAL VIEWS ABOUT PROGRAMME TYPES

Thank you for all your opinions so far about the quality of television. In this section of the questionnaire, we would like to ask your views about different types of programmes that are shown on television.

Q29 SHOWCARD N (R) From the following list, which are the five programme types you consider to be most valuable to you and your family personally on the main TV channels? You can pick up to five that are most important to you. CODE UP TO 5 ONLY

Q30 SHOWCARD N (R) AGAIN The previous question asked you which programme types were important to you personally. Now I would like you to think about how important these programmes are for the good of society as a whole. For example, you may personally think soaps are not important, but could still think they are important to society as a useful way of airing debates about current issues. So looking at the same list of programme types, please tell me which five you think are the most important for the main TV channels to provide for the good of society as whole. Again, you can pick up to five that you think are the most important. CODE UP TO 5 ONLY

Q31 SHOWCARD N (R) AGAIN Now thinking about programmes that are made in the UK. For which of the following do you think it is most important to be made in the UK and reflect life in the UK? Again, you can pick up to five that you think are the most important. CODE UP TO 5 ONLY

|   |   | Q29<br>(20) | Q30<br>(22) | Q31<br>(24) |
|---|---|-------------|-------------|-------------|
| A | News  | 1           | 1           | 1           |
| B | Current Affairs programmes such as<br>Tonight with Trevor McDonald and<br>Panorama  | 2           | 2           | 2           |
| C | Arts and classical music  | 3           | 3           | 3           |
| D | Children's  | 4           | 4           | 4           |
| E | Religious   | 5           | 5           | 5           |
| F | Serious Factual, including history,<br>nature or science programmes   | 6           | 6           | 6           |
| G | Other factual programmes including<br>hobbies, leisure and consumer<br>affairs e.g. Masterchef, Traffic Cops,<br>and The Gadget Show                                      | 7           | 7           | 7           |
| H | Programmes of an educational<br>nature  | 8           | 8           | 8           |
| I | Soaps   | 9           | 9           | 9           |
| J | Drama   | 0           | 0           | 0           |
| K | Films   | X           | X           | X           |
| L | Sport   | Y           | Y           | Y           |
|   |   | (21)        | (23)        | (25)        |
| M | Entertainment and contemporary<br>music e.g My Family, Strictly Come<br>Dancing and X Factor  | 1           | 1           | 1           |
| N | Comedy  | 2           | 2           | 2           |
| O | <b>1.1.1.8 News about and made for<br/>people in Northern<br/>Ireland</b>   | 3           | 3           | 3           |
| P | Current affairs about and made for<br>people in Northern Ireland e.g.<br>Hearts and Minds and Insight   | 4           | 4           | 4           |
| Q | Aside from news and current affairs,<br>other programmes about and made<br>for people in Northern Ireland e.g.<br>UTV Life, Derek's Dreams, Healy,<br>UTV Sport on Sunday | 5           | 5           | 5           |
|   | Other (please write in and code 6)  | 6           |             |             |



|               |   |   |   |
|---------------|---|---|---|
|               | 6 |   |   |
|               | 6 |   |   |
| None of these | 7 | 7 | 7 |
| Don't know    | 8 | 8 | 8 |

(20-25)

|  |
|--|
| DETAILED VIEWS TOWARDS GENRES ON INDIVIDUAL CHANNELS |
|--|

Q32 SHOWCARD O (R) I'd now like you to think about the types of programmes that TV channels provide. Some people think that there should be rules to make TV channels provide certain types of programmes, such as news, children's programmes, religious programmes, and programmes about and made for people in Northern Ireland. Other people say that it should be left for TV channels to decide what to show. Which of these statements is closest to your own views overall?  
SINGLE CODE ONLY

|   |   |   |
|---|---|---|
| A | There should be rules to make <u>all</u> TV channels (that is the main TV channels and digital channels) provide certain types of programmes such as news, children's programmes, religious programmes and programmes about Northern Ireland    | 1 |
| B | There should be rules to make <u>the main</u> TV channels (ie BBC One, BBC Two, UTV, Channel Four and Five) provide certain types of programmes such as news, children's programmes, religious programmes and programmes about Northern Ireland | 2 |
| C | There should be rules just to make the <u>BBC</u> provide certain types of programmes such as news, children's programmes, religious programmes and programmes about Northern Ireland   | 3 |
| D | All TV channels should be free to decide for themselves what types of programmes they broadcast   | 4 |
|   | Don't know  | 5 |

(26)

INTERVIEWER: FOR Q33-35, READ OUT EACH QUESTION IN TURN FOR EACH GENRE – EG READ OUT Q33 FOR NEWS, Q34 FOR NEWS, Q35 FOR NEWS, THEN Q33 FOR CURRENT AFFAIRS, Q34 FOR CURRENT AFFAIRS, Q35 FOR CURRENT AFFAIRS, AND SO ON. ROTATE THE ORDER IN WHICH YOU ASK ABOUT EACH GENRE – IE DO NOT START WITH NEWS EACH TIME – AND TICK START. THE RESPONDENT SHOULD KEEP HOLD OF SHOWCARD P (R) THROUGHOUT THIS SECTION.

- Q33 **The earlier questions asked you about the types of programmes you thought were important to you personally and for the good of society as a whole. Still thinking about the good of society, I now want you to think about how important it is that the main TV channels as a whole provide certain types of programme. So, for [READ OUT PROGRAMME TYPE], how important, if at all, do you think it is that these programmes are shown on the main TV channels as a whole? SINGLE CODE ONLY**
- Q34 **SHOWCARD P (R) AGAIN And how important, if at all, do you think it is that [READ OUT PROGRAMME TYPE] is shown on more than one of the main TV channels? SINGLE CODE ONLY**
- Q35 **And still thinking about [READ OUT PROGRAMME TYPE], please tell me whether you think there should be more, less or about the same amount of these types of programmes shown on the main TV channels than there is now? SINGLE CODE ONLY**

REPEAT Q33-35 FOR EACH PROGRAMME TYPE A-P BELOW

**A News**

|   | Very<br>import<br>ant | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (27) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (28) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (29) |

**B Current affairs**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (30) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (31) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (32) |

|   |                       |                        |                          |                          |                         |               |      |
|---|-----------------------|------------------------|--------------------------|--------------------------|-------------------------|---------------|------|
| <b>C      News about and made for people in Northern Ireland</b>  |                       |                        |                          |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (33) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?   | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (34) |
|   | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |      |
| Q35 More, less or about the same amount on the main TV channels?  | 1                     | 2                      | 3                        | 4                        |                         |               | (35) |
| <b>D      Current affairs about and made for people in Northern Ireland</b>                                       |                       |                        |                          |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (36) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?   | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (37) |
|   | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |      |
| Q35 More, less or about the same amount on the main TV channels?  | 1                     | 2                      | 3                        | 4                        |                         |               | (38) |
| <b>E      Aside from news and current affairs, other programmes about and made for people in Northern Ireland</b> |                       |                        |                          |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (39) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?   | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (40) |
|   | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |      |
| Q35 More, less or about the same amount on the main TV channels?  | 1                     | 2                      | 3                        | 4                        |                         |               | (41) |
| <b>F      Programmes that are made in the UK and reflect life in the UK</b>                                       |                       |                        |                          |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (42) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?   | 1                     | 2                      | 3                        | 4                        | 5                       | 6             | (43) |
|   | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |      |
| Q35 More, less or about the same amount on the main TV channels?  | 1                     | 2                      | 3                        | 4                        |                         |               | (44) |

|   |                       |                        |                               |                          |                         |               |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| <b>G</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Programmes that take place in different parts of the UK</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (45) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (46) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (47) |
| <b>H</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Children's programmes that reflect life in the UK</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (48) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (49) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (50) |
| <b>I</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Serious factual programmes for example, about nature, arts, science or history that are made in the UK</b> |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (51) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (52) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (53) |
| <b>J</b>  |                       |                        |                               |                          |                         |               |      |
| <b>Dramas that reflect life in the UK</b>   |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (54) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (55) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (56) |

|        |  |                       |                        |                          |                          |                         |               |
|--------|--|-----------------------|------------------------|--------------------------|--------------------------|-------------------------|---------------|
| K<br>□ | <b>Comedies and sitcoms that are made in the UK</b>                                      |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (57)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (58)        |
| L      |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (59)          |
|        |  |                       |                        |                          |                          |                         |               |
|        | <b>Programmes that get people interested in learning more about different topics</b>     |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (60)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (61)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
| M      | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (62)          |
|        |  |                       |                        |                          |                          |                         |               |
|        | <b>Religious programmes that are made in the UK</b>                                      |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (63)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (64)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (65)          |
| N      | <b>Programmes that appeal to a wide range of different cultural tastes and interests</b> |                       |                        |                          |                          |                         |               |
|        |  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor         | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |
|        | Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (66)        |
|        | Q34 Important that shown on <u>more than one</u> of the main TV channels?                | 1                     | 2                      | 3                        | 4                        | 5                       | 6 (67)        |
|        |  | More                  | Less                   | About the<br>same amount | Don't<br>know            |                         |               |
|        | Q35 More, less or about the same amount on the main TV channels?                         | 1                     | 2                      | 3                        | 4                        |                         | (68)          |
|        |  |                       |                        |                          |                          |                         |               |
|        |  |                       |                        |                          |                          |                         |               |

|        |    |
|--------|----|
| CARD 5 | 10 |
|--------|----|

|          |       |
|----------|-------|
| SKIP COL | 11-13 |
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☐ **Programmes that include people from different ethnic minority groups**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (14) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (15) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (16) |

☐ **Additional digital channels like BBC Three, E4, Five Life and ITV2**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| INTERVIEWER READ OUT<br>QUESTION WORDING AS SLIGHTLY<br>DIFFERENT                               |                       |                        |                               |                          |                         |               |      |
| Q31 Important that provided by the main television broadcasters?                                | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (17) |
| Q34 Important that <u>more than one</u> of the main television broadcasters provides them?      | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (18) |
| Q35 More, less or about the same amount provided by the main TV broadcasters than there is now? | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (19) |

Q36 SHOWCARD P (R) AGAIN **How important, if at all, is it that the main television channels as a whole provide...**

|    |   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|----|---|-----------------------|------------------------|------------------|--------------------------|-------------------------|---------------|------|
| a. | <b>Websites that provide additional content about different topics including news and entertainment</b> | 1                     | 2                      | 3                | 4                        | 5                       | 6             | (20) |
| b. | <b>Websites that allow you to watch TV programmes when you want to watch them</b>                       | 1                     | 2                      | 3                | 4                        | 5                       | 6             | (21) |

**I'd now like you to think about news and current affairs on the main TV channels as well as digital channels and the internet.**

Q37 SHOWCARD Q (R) **To what extent do you agree or disagree with each of the following statements about news?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-C AND ROTATE ORDER – TICK START

|                             |   | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | <b>It is important for each of the main TV channels to have at least one news programme during peak viewing hours (6pm-10.30pm)</b>     | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (22) |
| b.                          | <b>Now that there are dedicated digital news channels available, there is less of a need for news bulletins on the main TV channels</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (23) |
| <input type="checkbox"/> c. | <b>The internet is a better source of news than the main TV channels</b>  | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (24) |

Q38 **To what extent do you agree or disagree with each of the following statements on information about current affairs programmes such as Tonight with Trevor McDonald and Panorama?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND REVERSE ORDER – TICK START

|                             |  | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|-----------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> a. | <b>The main TV channels shouldn't be made to show current affairs programmes, there's plenty of choice on the digital channels</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (25) |
| <input type="checkbox"/> b. | <b>The internet is a better source of information about current affairs than the main TV channels</b>                              | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (26) |



I'd now like you to think about news about and made for people in Northern Ireland.

Q39 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about news about and made for people in Northern Ireland? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Television is an important source of news about Northern Ireland   | 1                     | 2     | 3  | 4            | 5                         | 6             | (27) |
|                          | b. It is important for UTV as well as the BBC to show news programmes about Northern Ireland  | 1                     | 2     | 3  | 4            | 5                         | 6             | (28) |
| <input type="checkbox"/> | c. News about Northern Ireland is of a generally high standard  | 1                     | 2     | 3  | 4            | 5                         | 6             | (29) |
|                          | d. The main TV channels shouldn't be made to show news programmes about Northern Ireland, there's plenty of news on the internet about Northern Ireland | 1                     | 2     | 3  | 4            | 5                         | 6             | (30) |

Q40 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about programmes about and made for people in Northern Ireland aside from news and current affairs? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS (A-F) AND ROTATE ORDER – TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Other than the news and current affairs, programmes about Northern Ireland are of no interest to me | 1                     | 2     | 3  | 4            | 5                         | 6             | (31) |
|                          | b. It is important to show programmes that take place in Northern Ireland                              | 1                     | 2     | 3  | 4            | 5                         | 6             | (32) |
| <input type="checkbox"/> | c. Broadcasters shouldn't be made to show set amounts of programmes about Northern Ireland             | 1                     | 2     | 3  | 4            | 5                         | 6             | (33) |
|                          | ASK ONLY IN NORTHERN IRELAND   |                       |       |  |              |                           |               |      |
| d.                       | It is important that some programmes shown in Northern Ireland are in Irish                            | 1                     | 2     | 3  | 4            | 5                         | 6             | (34) |
| e.                       | It is important that some programmes shown in Northern Ireland are in Ulster Scots                     | 1                     | 2     | 3  | 4            | 5                         | 6             | (35) |
| f.                       | ASK ONLY IN SCOTLAND   |                       |       |  |              |                           |               | (36) |
| g.                       | ASK ONLY IN WALES  |                       |       |  |              |                           |               | (37) |

ASK ALL

I'd now like to you to think about how you find out information about your local area.

Q41 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about information about your local area? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A AND B AND REVERSE ORDER – TICK BOX START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a | 1                     | 2     | 3  | 4            | 5                         | 6             | (38) |
|                          |   |                       |       |  |              |                           |               |      |
| <input type="checkbox"/> | b | 1                     | 2     | 3  | 4            | 5                         | 6             | (39) |
|                          |   |                       |       |  |              |                           |               |      |

I'd now like you to think about children's programmes on television.

Q42 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree the following statements about children's programmes on television? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS AND REVERSE ORDER – TICK BOX START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a | 1                     | 2     | 3  | 4            | 5                         | 6             | (40) |
|                          |   |                       |       |  |              |                           |               |      |
|                          | b | 1                     | 2     | 3  | 4            | 5                         | 6             | (41) |
|                          |   |                       |       |  |              |                           |               |      |
|                          | c | 1                     | 2     | 3  | 4            | 5                         | 6             | (42) |
|                          |   |                       |       |  |              |                           |               |      |
| <input type="checkbox"/> | d | 1                     | 2     | 3  | 4            | 5                         | 6             | (43) |
|                          |   |                       |       |  |              |                           |               |      |

Q43

SHOWCARD R (R) In the future, it may be the case that the main TV channels may not be able to provide all of the types of content that we have been talking about. For each of the content types that I'm about to read out, please can you tell me which of these statements is closest to your views? If you agree with statements B, C, and D please say so. CAN MULTICODE B, C AND D (DIGITAL CHANNELS AND INTERNET) OTHERWISE SINGLE CODE. READ OUT STATEMENTS A-M AND ROTATE ORDER – TICK BOX START

SINGLE CODE: READ OUT STATEMENTS IN ORDER FROM BOX STARTING WITH 1 TO BOX ENDING WITH 10

|                          |    | A) This needs to be shown on the main TV channels  | B) This doesn't need to be shown on the main TV channels so long as people can get it on digital channels provided by the main TV broadcasters (e.g. BBC Three, E4, Five Life, ITV2.) | C) This doesn't need to be shown on the main TV channels as the other digital channels provide this type of content (e.g. Sky One, Sky News, Living, Sky Sports, Sky Movies) | D) This doesn't need to be shown on the main TV channels so long as people can get this type of content on the internet | Don't know |   |      |
|--------------------------|----|--|---|--|---|------------|---|------|
| <input type="checkbox"/> | a. | News   | 1   | 2  | 3   | 4          | 5 | (44) |
|                          | b. | Current affairs  | 1   | 2  | 3   | 4          | 5 | (45) |
|                          | c. | News and information about and made for people in Northern Ireland                           | 1   | 2  | 3   | 4          | 5 | (46) |
|                          | d. | News and information about your local area   | 1   | 2  | 3   | 4          | 5 | (47) |
|                          | e. | Children's programmes that reflect life in the UK  | 1   | 2  | 3   | 4          | 5 | (48) |
| <input type="checkbox"/> | f. | Serious factual programmes (for example, about nature, science or history)                   | 1   | 2  | 3   | 4          | 5 | (49) |
|                          | g. | Drama that reflects life in the UK   | 1   | 2  | 3   | 4          | 5 | (50) |
|                          | h. | Programmes for schools (for example, BBC Learning Zone and Channel 4 Programmes for Schools) | 1   | 2  | 3   | 4          | 5 | (51) |
|                          | i. | Entertainment  | 1   | 2  | 3   | 4          | 5 | (52) |
|                          | j. | Sports   | 1   | 2  | 3   | 4          | 5 | (53) |
| <input type="checkbox"/> | k. | Programmes that get people interested in learning about different topics                     | 1   | 2  | 3   | 4          | 5 | (54) |
|                          | l. | Arts programmes made in the UK   | 1   | 2  | 3   | 4          | 5 | (55) |



Q44 SHOWCARD S (R) **Finally, thinking about everything we have talked about today, how satisfied or dissatisfied are you with...? READ OUT A-D SINGLE CODE ONLY**

|    |   | Very<br>satisfied | Fairly<br>satisfied | Neither<br>/nor | Fairly<br>dissatisfie<br>d | Very<br>dissatis<br>fied | Don't<br>know |          |
|----|---|-------------------|---------------------|-----------------|----------------------------|--------------------------|---------------|----------|
| a. | <b>The main TV channels</b>   | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (57<br>) |
| b. | <b>The digital channels provided by the main TV broadcasters – BBC Three, E4, Five Life, ITV2 and so on</b> | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (58<br>) |
| c. | <b>Other digital TV channels – eg Sky One, Sky News, Living, Sky Sports, Sky Movies and so on</b>           | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (59<br>) |
| d. | <b>All the TV that is available to you as a whole</b>   | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (60<br>) |

**Thank you very much for your time – your views will make a difference to the future of television in the UK. I now just need to ask you some questions about yourself to help us analyse the results – PLEASE GO TO DEMOGRAPHICS**

**THIS MUST BE THE LAST PAGE OF THE QUESTIONNAIRE AND MUST BE SINGLE SIDED**

Ipsos MORI/31644BB01  
1-5

Questionnaire No:

|           |    |
|-----------|----|
| Serial No |    |
| OUO (6-9) |    |
| CARD      | 10 |

**Ofcom PSB Survey – Northern Ireland (Version 2)**  
**Final Questionnaire**

Interviewer Number:

-       
(11) (12) (13) (14) (15) (16) (11-16)

Name/Initial/Title: Mr/Mrs/Ms/Miss

Address:

Full Postcode

QTEL1 **Do you have a fixed line telephone at home which you use for incoming and outgoing voice calls?**

|                       |   |             |
|-----------------------|---|-------------|
| Yes                   | 1 |             |
| WRITE IN Full tel. No |   |             |
| No                    | 2 |             |
| Refused               | 3 | GO TO QTEL2 |
| Ex-directory          | 4 |             |

QTEL2 **ASK IF NO FIXED LINE/REFUSED/EX-DIRECTORY (CODES 2-4). OTHERS CLOSE**  
**Can I just check, do you have a mobile phone? IF YES ASK: Can I take the number please?**

|                       |   |  |
|-----------------------|---|--|
| Yes                   | 1 |  |
| WRITE IN Full tel. No |   |  |
| No                    | 2 |  |
| Refused               | 3 |  |

**IT IS VERY IMPORTANT THAT YOU FILL IN THE SAMPLE POINT NUMBER, QUESTIONNAIRE NUMBER AND INTERVIEWER NUMBER ON BOTH THE FRONT AND BACK PAGE OF THE QUESTIONNAIRE.**

Please look on the intranet under documents/data protection for examples of agreement to re-contact respondents and consent forms

Ipsos MORI/31644bb02  
1-5

Questionnaire No:

|           |    |
|-----------|----|
| Serial No |    |
| OUO (6-9) |    |
| CARD 1    | 10 |

**Ofcom PSB Survey – Rural booster  
Final Questionnaire**

Sample Point Number:

Sample point name:

**SECTION A: DEMOGRAPHICS**

**Sampling Point Summary:**

**CABLE (SINGLE CODE)**

|                    |   |      |
|--------------------|---|------|
| Cable Coverage     | 1 |      |
| Non-Cable Coverage | 2 | (11) |

**URBAN/RURAL (SINGLE CODE)**

|                                |   |      |
|--------------------------------|---|------|
| Cities/large towns – urban- GB | 1 |      |
| Medium-Size towns – urban- GB  | 2 |      |
| Small towns – urban- GB        | 3 |      |
| Rural - GB                     | 4 |      |
| Urban - NI                     | 5 |      |
| Rural - NI                     | 6 | (12) |

**DEPRIVATION (SINGLE CODE )**

|                    |   |      |
|--------------------|---|------|
| Low Deprivation    | 1 |      |
| Medium Deprivation | 2 |      |
| High Deprivation   | 3 | (13) |

**GEOGRAPHIC AREA  
(Government Region) (SINGLE CODE)**

|                    |   |      |
|--------------------|---|------|
| London             | 1 |      |
| South East         | 2 |      |
| South West         | 3 |      |
| East Midlands      | 4 |      |
| West Midlands      | 5 |      |
| North East         | 6 |      |
| North West         | 7 |      |
| East England       | 8 |      |
| Yorkshire & Humber | 9 |      |
| Scotland           | 0 |      |
| Wales              | X |      |
| Northern Ireland   | Y | (14) |

**QA Gender**

|        |   |      |
|--------|---|------|
| Male   | 1 |      |
| Female | 2 | (15) |



WRITE IN & CODE EXACT AGE

QB    **Exact**          
**Age**                      (16)    (17)

|                                     |       |   |
|-------------------------------------|-------|---|
| <i>Spare line for other surveys</i> |       |   |
|                                     | 18-24 | 2 |
|                                     | 25-34 | 3 |
|                                     | 35-44 | 4 |
|                                     | 45-54 | 5 |
|                                     | 55-64 | 6 |
|                                     | 65-74 | 7 |
|                                     | 75+   | 8 |

(18)

### Interviewer Declaration

I confirm that I have carried out this Interview face-to-face with the named person of the address attached and that I asked all the relevant questions fully and recorded the answers in conformance with the survey specification and within the MRS Code of Conduct and the Data Protection Act 1998.

Signature: .....

Interviewer Name (CAPS): .....

.....

Interviewer Number:

-                   
 (19)    (20)    (21)    (22)    (23)    (24)    (19-24)

Day of Interview    1    2    3    4    5    6    7  
                                  (Mon)    (Thur)    (Sun)    (25)

Date of Interview:      /   /07    (26-

Length of Interview:      (minutes)    (30-

**QC Respondent is: SINGLE  
CODE**

|  |   |
|--|---|
| Working full time (30hrs/wk+)  | 1 |
| Working part time (8-29hrs/wk)   | 2 |
| Not working (i.e. under 8hrs/week-retired)   | 3 |
| Not working (i.e. under 8hrs/week)-unemployed (registered/not registered but looking for work) | 4 |
| Not working (i.e. under 8hrs/week)-student   | 5 |
| Not working (i.e. under 8hrs/week)-housewife /disabled /other                                  | 6 |
| Don't know   | 7 |

(32)

**QD SHOWCARD T Which of the groups on this card, if any, would you say you belong to? SINGLE CODE ONLY**

|                                      |      |
|--------------------------------------|------|
| <b>WHITE</b>                         | (33) |
| British                              | 1    |
| Irish                                | 2    |
| Any other white background           | 3    |
| <b>MIXED</b>                         |      |
| White and Black Caribbean            | 4    |
| White and Black African              | 5    |
| White and Asian                      | 6    |
| Any other mixed background           | 7    |
| <b>ASIAN OR ASIAN BRITISH</b>        |      |
| Indian                               | 8    |
| Pakistani                            | 9    |
| Bangladeshi                          | 0    |
| Any other Asian background           | X    |
| <b>BLACK OR BLACK BRITISH</b>        |      |
| Caribbean                            | Y    |
|                                      | (34) |
| African                              | 1    |
| Any other black background           | 2    |
| <b>CHINESE OR OTHER ETHNIC GROUP</b> |      |
| Chinese                              | 3    |
| Any other background                 | 4    |
| Refused                              | 5    |

**QE Home is: SINGLE  
CODE**

|   |   |
|---|---|
| Being bought on mortgage                              | 1 |
| Owned outright by household                           | 2 |
| Rented from Local Authority/Housing Association/Trust | 3 |
| Rented from private landlord                          | 4 |
| Other   | 5 |
| Don't know  | 6 |

(35)

**QF Occupation of Chief Income Earner**

Position/rank/grade

Industry/type of company

Quals/degree/apprenticeship

Number of staff responsible for

REMEMBER TO PROBE FULLY AND CODE FROM ABOVE

**QG Class**

|    |   |
|----|---|
| A  | 1 |
| B  | 2 |
| C1 | 3 |
| C2 | 4 |
| D  | 5 |
| E  | 6 |

(36)

**QH Total number in household (including respondent and any children)**

(37)

**Number of children in household (Under 16)**

(38)

ASK IF HAVE AT LEAST ONE CHILD IN HH  
(UNDER 16)

QI **How old is/are your child/ren?** MULTICODE  
OK

|            | (39) |
|------------|------|
| 1 or under | 1    |
| 2          | 2    |
| 3          | 3    |
| 4          | 4    |
| 5          | 5    |
| 6          | 6    |
| 7          | 7    |
| 8          | 8    |
| 8          | 9    |
| 10         | 0    |
| 11         | X    |
| 12         | Y    |
|            | (40) |
| 13         | 1    |
| 14         | 2    |
| 15         | 3    |

(39-40)

ASK ALL WITH CHILDREN UNDER 16 IN THE  
HOUSEHOLD

QJ **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 |

(41)

ASK ALL

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

YOU OTHER  
H/HOLD  
MEMBER

|            | (42) | (43) |
|------------|------|------|
| Yes        | 1    | 1    |
| No         | 2    | 2    |
| Don't know | 3    | 3    |

(42-43)

ASK ALL

QL **SHOWCARD U (R) Would you please  
tell me the letter from this card for  
the group in which you would place  
your total household income from  
all sources before tax and  
deductions.** REASSURE ABOUT  
CONFIDENTIALITY

|                     | (44) |
|---------------------|------|
| B Less than £11,500 | 1    |
| E £11,500 - £17,499 | 2    |
| D £17,500 - £29,999 | 3    |
| A £30,000 - £49,999 | 4    |
| C £50,000 and over  | 5    |
| Refused             | 6    |
| Don't know          | 7    |

(44)

### MOBILE PHONES

QM **Do you personally use a  
mobile phone** SINGLE CODE

|            |   |
|------------|---|
| Yes        | 1 |
| No         | 2 |
| Don't know | 3 |

(45)

INTERVIEWER RECORD END TIME AFTER DEMOGRAPHICS

|                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Hours                |                      | Mins                 |                      |

INTERVIEWER RECORD START TIME

|                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Hours                |                      | Mins                 |                      |

### INTRODUCTION/CONFIDENTIALITY

Good morning, afternoon, evening. My name is ..... from Ipsos MORI, the research organisation, and we are carrying out a survey for Ofcom, the independent body set up by the Government to oversee broadcasting and telecommunications in the UK. We'd like you to answer some questions about television in the UK – what's good and bad about it, and which channels should show which type of programmes. This is your opportunity for you to help shape the future of television. The survey will take about 35 minutes. We also want to find out your views about the internet and other types of media (such as radio, newspapers etc).

Initially, we would like to ask you some broad questions about your attitudes towards television and the media in general.

**I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual or address in the results.**

### TELEVISION VIEWING

ASK ALL

Q69. **First of all, on an average day how many hours would you say you watch TV? SINGLE CODE**

|                     |   |
|---------------------|---|
| Up to about an hour | 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 |

(11)

Q70. SHOWCARD A (R) **Which, if any, of these types of television does your household receive at the moment? MULTICODE OK**

|   |   |   |          |
|---|---|---|----------|
| A | Only the main channels (BBC One, BBC Two, ITV1, Channel 4 and Five)   | 1 | GO TO Q5 |
| B | Cable TV (through NTL / Telewest / Virgin Media)  | 2 | GO TO Q4 |
| C | Satellite TV (Sky)  | 3 | ASK Q3   |
| D | Satellite TV (Other)  | 4 |          |
| E | Freeview (through a set-top box or digital television set) with ONLY free channels  | 5 | GO TO Q4 |
| F | 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 |          |

|   |  |   |          |
|---|--|---|----------|
| G | Digital TV via a broadband DSL line (from HomeChoice or Kingston Communications) | 7 |          |
|   | Any other mention of Virgin  | 8 |          |
|   | Other (please write in and code 9)   | 9 | GO TO Q5 |
|   | No TV in household   | 0 | GO TO Q7 |
|   | Don't know   | X | GO TO Q5 |

(12)

Q71. ASK THOSE WITH SATELLITE TV (CODES 3-4 AT Q2)

**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 |
| Free-to-air services only (no monthly subscription fee)        | 2 |
| Don't know   | 3 |

(13)

Q72. ASK THOSE WITH MULTICHANNEL TV (CODES 2-8 AT Q2)

**Does your household have a device that has a hard disc and allows you to pause, rewind and record live TV programmes? These are sometimes known as Sky +, V+, Tivo or Telewest drive. SINGLE CODE**

|            |   |
|------------|---|
| Yes        | 1 |
| No         | 2 |
| Don't know | 3 |

(14)

ASK ALL WITH TV IN HOUSEHOLD

Q73. SHOWCARD B (R) **Which of these television channels and services, if any, would you say you watch regularly? That is, a few times a week. MULTICODE OK**

|   |                                  |   |
|---|----------------------------------|---|
| A | BBC One                          | 1 |
| B | BBC Two                          | 2 |
| C | ITV1                             | 3 |
| D | Channel 4                        | 4 |
| E | Five                             | 5 |
| F | Teletext or Ceefax               | 6 |
|   | <i>Spare line for Wales only</i> |   |
|   | None of them                     | 8 |
|   | Don't know                       | 9 |

(15)

Q74. SHOWCARD C (R) And which of the following types of programmes, if any, would you say you watch regularly on the main TV channels (that is BBC One, BBC Two, ITV1, Channel 4 and Five)? MULTICODE OK

|   |   |      |
|---|---|------|
|   |   | (16) |
| A | News  | 1    |
| B | Current Affairs programmes such as Tonight with Trevor McDonald and Panorama  | 2    |
| C | Arts and classical music  | 3    |
| D | Children's  | 4    |
| E | Religious   | 5    |
| F | Serious Factual, including history, nature or science programmes  | 6    |
| G | Other factual programmes including hobbies, leisure and consumer affairs e.g. Masterchef, Traffic Cops, and The Gadget Show | 7    |
| H | Programmes of an educational nature   | 8    |
| I | Soaps   | 9    |
| J | Drama   | 0    |
| K | Films   | X    |
| L | Sport   | Y    |
|   |   | (17) |
| M | Entertainment and contemporary music e.g My Family, Strictly Come Dancing and X Factor                                      | 1    |
| N | Comedy  | 2    |
| O | <b>1.1.1.9 News about my region</b>   | 3    |
| P | Current affairs about my region   | 4    |
| Q | Aside from news and current affairs, other programmes about my region   | 5    |
|   | Other   | 0    |
|   | None of these   | X    |
|   | Don't know  | Y    |

(16-17)

# INTERNET USAGE

I would now like to ask you about the internet

Q75. ASK ALL  
Do you personally use the internet? SINGLE CODE

|            |   |           |
|------------|---|-----------|
| Yes        | 1 | ASK Q8    |
| No         | 2 | GO TO Q11 |
| Don't know | 3 |           |

(18)

Q76. ASK THOSE WITH INTERNET ACCESS (CODE 1 AT Q7)  
Where do you access the internet? MULTICODE OK

|  |   |           |
|--|---|-----------|
| At home  | 1 | ASK Q9    |
| At work (out of home)  | 2 |           |
| At a public place (internet café,<br>library, by mobile phone, etc.) | 3 | GO TO Q10 |
| At university / college  | 4 |           |
| At school  | 5 |           |
| Elsewhere (friends, relatives,<br>etc.)                              | 6 |           |
| Other  | 7 |           |
| Don't know   | 8 |           |

(19)

Q77. ASK THOSE WITH INTERNET ACCESS AT HOME (CODE 1 AT Q8)  
SHOWCARD D (R) And which of these methods does your household use to connect to  
the Internet at home? Just read out the letter or letters that apply. MULTICODE OK

|   |   |   |
|---|---|---|
| A | Ordinary phone line – dial-up<br>access   | 1 |
| B | Broadband - high-speed access,<br>allowing you to make telephone<br>calls at the same time as using<br>the internet | 2 |
| C | Wireless access through a<br>wireless router, WIFI or portable<br>device  | 3 |
|   | Other (please write in and code<br>4)   | 4 |
|   | Don't know  | 5 |

(20)

Q78. ASK THOSE WITH ANY INTERNET ACCESS (CODE 1 AT Q7)  
How often do you tend to use the internet? SINGLE CODE ONLY

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

(21)

# CROSS-PLATFORM PREFERENCES FOR DIFFERENT TYPES OF CONTENT

ASK ALL

Throughout this questionnaire, I am going to be asking you questions about the main TV channels. When I ask you about these, I am talking about the five main TV channels – BBC One, BBC Two, ITV1, Channel 4, and Five

READ OUT a-e AND ROTATE ORDER LIST. TICK START.

Q79. SHOWCARD E (R) Which of these different media available to you (such as television, radio, internet etc.) would you say you use as a source for ...? MULTICODE OK

Q80. And which of these different media would you say is your main source for...? SINGLE CODE INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS.

|            |  | a.<br>Entertainment      |      | b.<br>News about<br>the UK |      | c.<br>News about<br>the World |      | d.<br>News about your<br>region |      | e.<br>News about<br>your local<br>area |      |
|------------|--|--------------------------|------|----------------------------|------|-------------------------------|------|---------------------------------|------|--|------|
|            |  | ALL                      | MAIN | ALL                        | MAIN | ALL                           | MAIN | ALL                             | MAIN | ALL                                    | MAIN |
| TICK START |  | <input type="checkbox"/> |      |                            |      | <input type="checkbox"/>      |      |                                 |      | <input type="checkbox"/>               |      |
|            |  | (22)                     | (24) | (26)                       | (28) | (30)                          | (32) | (34)                            | (36) | (38)                                   | (40) |
| A          | TV on the main channels  | 1                        | 1    | 1                          | 1    | 1                             | 1    | 1                               | 1    | 1                                      | 1    |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2                        | 2    | 2                          | 2    | 2                             | 2    | 2                               | 2    | 2                                      | 2    |
| C          | Radio  | 3                        | 3    | 3                          | 3    | 3                             | 3    | 3                               | 3    | 3                                      | 3    |
| D          | Newspapers   | 4                        | 4    | 4                          | 4    | 4                             | 4    | 4                               | 4    | 4                                      | 4    |
| E          | Magazines  | 5                        | 5    | 5                          | 5    | 5                             | 5    | 5                               | 5    | 5                                      | 5    |
| F          | Books  | 6                        | 6    | 6                          | 6    | 6                             | 6    | 6                               | 6    | 6                                      | 6    |
| G          | Internet via pc or laptop  | 7                        | 7    | 7                          | 7    | 7                             | 7    | 7                               | 7    | 7                                      | 7    |
| H          | Teletext or Ceefax   | 8                        | 8    | 8                          | 8    | 8                             | 8    | 8                               | 8    | 8                                      | 8    |
| I          | Videos/DVDs  | 9                        | 9    | 9                          | 9    | 9                             | 9    | 9                               | 9    | 9                                      | 9    |
| J          | Computer games/games console   | 0                        | 0    | 0                          | 0    | 0                             | 0    | 0                               | 0    | 0                                      | 0    |
|            | Other  | X                        | X    | X                          | X    | X                             | X    | X                               | X    | X                                      | X    |
|            | I'm not interested in this   | Y                        | Y    | Y                          | Y    | Y                             | Y    | Y                               | Y    | Y                                      | Y    |
|            |  | (23)                     | (25) | (27)                       | (29) | (31)                          | (33) | (35)                            | (37) | (39)                                   | (41) |
|            | None   | 1                        | 1    | 1                          | 1    | 1                             | 1    | 1                               | 1    | 1                                      | 1    |
|            | Don't know   | 2                        | 2    | 2                          | 2    | 2                             | 2    | 2                               | 2    | 2                                      | 2    |

22-41)



READ OUT f - i AND ROTATE ORDER LIST. TICK START.

Q11 SHOWCARD E (R) AGAIN Which of these different media available to you (such as television, radio, internet etc) would you say you use as a source for each of the following categories? MULTICODE OK

Q12 And which of these different media would you say is your main source for...?INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS. SINGLE CODE

|            |  | f.<br>Your<br>personal<br>interests<br>and<br>pastimes |      | g.<br>Knowledge<br>about<br>topics such<br>as arts,<br>science<br>nature or<br>history |      | h<br>Sports news<br>and<br>information |      | i<br>Finding out<br>about people<br>with <u>similar</u><br>interests to<br>your own |          |
|------------|--|--|------|--|------|--|------|---|----------|
|            |  | ALL  | MAIN | ALL  | MAIN | ALL                                    | MAIN | ALL   | MAIN     |
| TICK START |  | <input type="checkbox"/>                               |      | <input type="checkbox"/>   |      |  |      | <input type="checkbox"/>  |          |
|            |  | (42)   | (44) | (46)   | (48) | (50)                                   | (52) | (54)  | (56)     |
| A          | TV on the main channels  | 1  | 1    | 1  | 1    | 1                                      | 1    | 1   | 1        |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2  | 2    | 2  | 2    | 2                                      | 2    | 2   | 2        |
| C          | Radio  | 3  | 3    | 3  | 3    | 3                                      | 3    | 3   | 3        |
| D          | Newspapers   | 4  | 4    | 4  | 4    | 4                                      | 4    | 4   | 4        |
| E          | Magazines  | 5  | 5    | 5  | 5    | 5                                      | 5    | 5   | 5        |
| F          | Books  | 6  | 6    | 6  | 6    | 6                                      | 6    | 6   | 6        |
| G          | Internet via pc or laptop  | 7  | 7    | 7  | 7    | 7                                      | 7    | 7   | 7        |
| H          | Teletext or Ceefax   | 8  | 8    | 8  | 8    | 8                                      | 8    | 8   | 8        |
| I          | Videos/DVDs  | 9  | 9    | 9  | 9    | 9                                      | 9    | 9   | 9        |
| J          | Computer games/games console   | 0  | 0    | 0  | 0    | 0                                      | 0    | 0   | 0        |
|            | Other  | X  | X    | X  | X    | X                                      | X    | X   | X        |
|            | I'm not interested in this   | Y  | Y    | Y  | Y    | Y                                      | Y    | Y   | Y        |
|            |  | (43)   | (45) | (47)   | (49) | (51)                                   | (53) | (55)  | (57)     |
|            | None   | 1  | 1    | 1  | 1    | 1                                      | 1    | 1   | 1        |
|            | Don't know   | 2  | 2    | 2  | 2    | 2                                      | 2    | 2   | 2 42-57) |

READ OUT j - k AND ROTATE ORDER LIST. TICK START.

Q11 SHOWCARD E (R) AGAIN Which of these different media available to you (such as television, radio, internet etc) would you say you use as a source for each of the following categories? MULTICODE OK

Q12 And which of these different media would you say is your main source for...INTERVIEWER NOTE. WHERE THERE IS ONLY ONE PLEASE CODE ACROSS. SINGLE CODE

|            |  | j<br>Finding about<br>people with<br>values and<br>lifestyles that<br>are different<br>to your own |              | k<br>Discovering<br>new things |              |
|------------|--|--|--------------|--------------------------------|--------------|
|            |  | ALL<br>□<br>(58)   | MAIN<br>(60) | ALL<br>□<br>(62)               | MAIN<br>(64) |
| TICK START |  |  |              |                                |              |
| A          | TV on the main channels  | 1  | 1            | 1                              | 1            |
| B          | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2  | 2            | 2                              | 2            |
| C          | Radio  | 3  | 3            | 3                              | 3            |
| D          | Newspapers   | 4  | 4            | 4                              | 4            |
| E          | Magazines  | 5  | 5            | 5                              | 5            |
| F          | Books  | 6  | 6            | 6                              | 6            |
| G          | Internet via pc or laptop  | 7  | 7            | 7                              | 7            |
| H          | Teletext or Ceefax   | 8  | 8            | 8                              | 8            |
| I          | Videos/DVDs  | 9  | 9            | 9                              | 9            |
| J          | Computer games/ games console  | 0  | 0            | 0                              | 0            |
|            | Other  | X  | X            | X                              | X            |
|            | I'm not interested in this   | Y  | Y            | Y                              | Y            |
|            |  | (59)   | (61)         | (63)                           | (65)         |
|            | None   | 1  | 1            | 1                              | 1            |
|            | Don't know   | 2  | 2            | 2                              | 2            |

(58-65)

CARD 3

10

Q81. SHOWCARD E (R) AGAIN And looking at this list again, which one of these, if any, do you think you would find it hardest to live without? SINGLE CODE ONLY

|   |  | (11) |
|---|--|------|
| A | TV on the main channels  | 1    |
| B | TV on digital channels e.g. Sky One, Sky Sports, BBC Three, E4, Living | 2    |
| C | Radio  | 3    |
| D | Newspapers   | 4    |
| E | Magazines  | 5    |
| F | Books  | 7    |
| G | Internet via pc or laptop  | 8    |
| H | Teletext or Ceefax   | 9    |
| I | Videos/DVDs  | 0    |

|   |                                |      |
|---|--------------------------------|------|
| J | Computer games / games console | X    |
|   | Other                          | Y    |
|   |                                | (12) |
|   | None                           | 1    |
|   | Don't know                     | 2    |

(11-

Q82. SHOWCARD F (R) **To what extent do you agree or disagree with each of the following statements about television?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-J AND ROTATE ORDER. TICK START

|                          |  | Agree<br>strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--------------------------|--|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
| <input type="checkbox"/> | a. As well as entertaining and informing people, television has an important social role to play                                       | 1                     | 2     | 3  | 4             | 5                             | 6                 | (13) |
|                          | b. Television should help to promote understanding and tolerance of different religions, cultures and lifestyles                       | 1                     | 2     | 3  | 4             | 5                             | 6                 | (14) |
|                          | c. Television's main role should be to provide entertainment rather than information or education                                      | 1                     | 2     | 3  | 4             | 5                             | 6                 | (15) |
|                          | d. I have personally learned useful things from watching television  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (16) |
|                          | e. Television is very influential in shaping public opinion about political and other important issues                                 | 1                     | 2     | 3  | 4             | 5                             | 6                 | (17) |
| <input type="checkbox"/> | f. Television has an important role to play in making people interested in different subjects, like arts, nature, sciences and history | 1                     | 2     | 3  | 4             | 5                             | 6                 | (18) |
|                          | g. It is important that television is available to everyone  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (19) |
|                          | h. Television has an important role in helping children and teenagers understand life in the UK  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (20) |
| <input type="checkbox"/> | i. With so many channels now available, it's hard to find what I want  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (21) |
|                          | j. TV programmes sometimes change the way I think about things   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (22) |

Q83. SHOWCARD F (R) AGAIN **And to what extent do you agree or disagree with each of the following statements about the internet?** SINGLE CODE ONLY FOR EACH LINE.  
READ OUT STATEMENTS (A-J) AND (K-M) AND ROTATE ORDER – TICK START

|                          |  | Agree<br>Strong<br>ly | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strong<br>ly | No<br>opinio<br>n |      |
|--------------------------|--|-----------------------|-------|--|---------------|-------------------------------|-------------------|------|
| <input type="checkbox"/> | a. As well as entertaining and informing people, the internet has an important social role to play   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (23) |
|                          | b. The internet should help to promote understanding and tolerance of different religions, cultures and lifestyles                         | 1                     | 2     | 3  | 4             | 5                             | 6                 | (24) |
|                          | c. The internet's main role should be to provide entertainment rather than information or education  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (25) |
| <input type="checkbox"/> | d. The internet is very influential in shaping public opinion about political and other important issues                                   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (26) |
|                          | e. The internet is a valuable source of information and learning   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (27) |
|                          | f. The internet has an important role to play in making people interested in different subjects like the arts, nature, science and history | 1                     | 2     | 3  | 4             | 5                             | 6                 | (28) |
| <input type="checkbox"/> | g. The internet has an important role to play in helping children and teenagers understand life in the UK                                  | 1                     | 2     | 3  | 4             | 5                             | 6                 | (29) |
|                          | h. The internet is a valuable source of information and entertainment for children and teenagers   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (30) |
|                          | i. It's important that the internet is available to everyone   | 1                     | 2     | 3  | 4             | 5                             | 6                 | (31) |

ASK J-L OF THOSE WITH INTERNET ACCESS. CODE 1 AT Q7.

|    |  | Agree<br>strongly | Agree | Neither<br>agree<br>nor dis-<br>agree | Dis-<br>agree | Dis-<br>agree<br>strongly | No<br>opinion |      |
|----|--|-------------------|-------|---------------------------------------|---------------|---------------------------|---------------|------|
| j. | With so many websites on the internet, it's hard to find what I want | 1                 | 2     | 3                                     | 4             | 5                         | 6             | (32) |
| k. | I have personally learned useful things from the internet            | 1                 | 2     | 3                                     | 4             | 5                         | 6             | (33) |
| l. | Websites sometimes change the way I think about things               | 1                 | 2     | 3                                     | 4             | 5                         | 6             | (34) |

Q84. ASK ALL **Thinking about the main TV channels, that is BBC One, BBC Two, ITV1, Channel 4 and Five, would you say you are watching them more, less, or about the same as you were 4-5 years ago?** SINGLE CODE ONLY

|                |   |           |
|----------------|---|-----------|
| More           | 1 | GO TO Q18 |
| About the same | 2 |           |
| Less           | 3 | ASK Q17   |
| Don't know     | 4 | GO TO Q18 |

(35)

Q85. ASK THOSE WHO SAY THEY WATCH LESS TV. CODE 3 AT Q16. OTHERS GO TO Q18  
SHOWCARD G (R) **Could you say why it is you are watching them less than 4-5 years ago?** MULTICODE OK

|   |   |   |
|---|---|---|
| A | I am less interested in watching TV generally now   | 1 |
| B | I have less time to watch TV generally now because I am too busy or have had a change in my circumstances | 2 |
| C | I watch more of the main TV channels' digital channels instead – e.g. BBC Three, E4, Five Life, ITV2      | 3 |
| D | I watch more of other digital channels instead – e.g. Sky One, Sky News, Living, Sky Sports, Sky Movies   | 4 |
| E | I use the internet more instead of watching TV  | 5 |
| F | I play computer games more instead of watching TV   | 6 |
| G | I don't find the programmes as enjoyable/interesting as I used to do                                      | 7 |
| H | There are fewer programmes that appeal to my interests  | 8 |
|   | Other (please write in and code 9)  | 9 |
|   | Don't know  | 0 |

(36)

ASK ALL

# **HARD CHOICES: CONTENT PRIORITIES**

**Different people have different expectations – some people want to see more soaps and reality TV shows while others want more news and documentaries.**

**Q18. SHOWCARD H (R) I am now going to read out to you a number of different choices relating to the five main television channels, BBC One and Two, ITV1, Channel 4 and Five. For each pair of choices, I would like you to tell me which one is the closest to what you would most like to see. READ OUT STATEMENTS A AND B – SINGLE CODE**

|   |   |   |
|---|---|---|
| A | <b>A wide variety of different programme types, for example news, sports, documentaries, entertainment, religious, and the arts</b> | 1 |
| B | <b>More of the popular entertainment programmes that most people want to watch</b>  | 2 |
|   | <b>No preference</b>  | 3 |
|   | <b>Don't know</b>   | 4 |

(37)

**Q19. SHOWCARD I (R). READ OUT STATEMENTS A AND B – SINGLE CODE**

|   |   |   |
|---|---|---|
| A | <b>TV programmes that reflect the needs and concerns of different communities within the UK (religious, regional or national, and ethnic)</b> | 1 |
| B | <b>TV programmes that reflect the needs and concerns of the UK as a whole</b>   | 2 |
|   | <b>No preference</b>  | 3 |
|   | <b>Don't know</b>   | 4 |

(38)

**Q20. SHOWCARD J (R). READ OUT STATEMENTS A AND B – SINGLE CODE**

|   |   |   |
|---|---|---|
| A | <b>The best TV programmes from the USA, Europe, Australia and other countries</b> | 1 |
| B | <b>A high proportion of programmes made in the UK</b>                             | 2 |
|   | <b>No preference</b>  | 3 |
|   | <b>Don't know</b>   | 4 |

(39)

**Q21. SHOWCARD K (R). READ OUT STATEMENTS A AND B – SINGLE CODE**

|   |  |   |
|---|--|---|
| A | <b>Lots of original and experimental programme ideas</b> | 1 |
| B | <b>More of people's tried and tested favourites</b>      | 2 |
|   | <b>No preference</b>                                     | 3 |
|   | <b>Don't know</b>  | 4 |

(40)

**Q22. SHOWCARD L (R). READ OUT STATEMENTS A AND B – SINGLE CODE**

|   |  |   |
|---|--|---|
| A | <b>The main channels should provide programmes that are targeted at mass audiences</b>                                       | 1 |
| B | <b>The main channels should provide a range of programmes that are targeted at a wide range of different audience groups</b> | 2 |

|               |   |      |
|---------------|---|------|
| No preference | 3 | (41) |
| Don't know    | 4 |      |



|   |
|---|
| GENERAL VIEWS ABOUT PARTICULAR CHANNELS |
|---|

I'd now like to ask you some questions about specific TV channels – BBC, ITV1, Channel 4 and Five.

Q23

SHOWCARD M (R) To what extent do you agree or disagree with each of the following statements about the BBC's television and internet services? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-F AND ROTATE ORDER, TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neither<br>agree<br>nor dis-<br>agree | Disagre<br>e | Disagree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|---------------------------------------|--------------|----------------------|---------------|------|
| <input type="checkbox"/> | a. The BBC should have a responsibility to set high standards  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (42) |
|                          | b. Given it receives public funding via the licence fee, the BBC should have special responsibilities to show programmes which commercial broadcasters don't | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (43) |
|                          | c. As licence fee payers, we are entitled to expect the BBC to provide more programmes that suit our tastes and interests than other broadcasters            | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (44) |
| <input type="checkbox"/> | d. It is important for the BBC to show a high proportion of programmes which reflect life in the UK  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (45) |
|                          | e. It's important for the BBC to keep up with new technology, for example, by allowing people to download its programmes onto their computers                | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (46) |
| <input type="checkbox"/> | f. The BBC's website is a useful source of information about my local area and region  | 1                     | 2     | 3                                     | 4            | 5                    | 6             | (47) |

SKIP COL

48

Q24

SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about ITV1? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-H AND ROTATE ORDER, TICK START

|                          |  | Agree<br>strongl<br>y | Agree | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. <b>ITV1 should concentrate on popular entertainment programmes, drama and soaps, rather than try to do everything</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (49) |
|                          | b. <b>It is important for ITV1 to show a range of programmes about my region aside from news and current affairs</b>     | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (50) |
|                          | c. <b>ITV1 should be free to do whatever it feels it needs to do so that it can continue to attract a large audience</b> | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (51) |
| <input type="checkbox"/> | d. <b>ITV1 should show children's programmes that reflect life in the UK</b>   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (52) |
|                          | e. <b>ITV1 should show more serious documentaries and current affairs at peak times (between 6pm-10.30pm)</b>            | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (53) |
|                          | f. <b>It is important for ITV1 to show a high proportion of programmes that reflect life in the UK</b>                   | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (54) |
| <input type="checkbox"/> | g. <b>It is important for ITV1 to show programmes that are made in a variety of different parts of the UK</b>            | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (55) |
|                          | h. <b>ITV1's website is a useful source of information about my local area and region</b>                                | 1                     | 2     | 3                                      | 4            | 5                         | 6             | (56) |

Q25

SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Channel 4? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-K AND ROTATE ORDER, TICK START

|                          |    | Agree<br>strongl<br>y | Agre<br>e | Neithe<br>r agree<br>nor dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|----|-----------------------|-----------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (57) |
|                          |    |                       |           |  |              |                           |               |      |
|                          | b. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (58) |
|                          |    |                       |           |  |              |                           |               |      |
|                          | c. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (59) |
|                          |    |                       |           |  |              |                           |               |      |
|                          | d. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (60) |
|                          |    |                       |           |  |              |                           |               |      |
|                          | e. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (61) |
|                          |    |                       |           |  |              |                           |               |      |
| <input type="checkbox"/> | f. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (62) |
|                          |    |                       |           |  |              |                           |               |      |
|                          | g. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (63) |
|                          |    |                       |           |  |              |                           |               |      |
|                          | h. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (64) |
|                          |    |                       |           |  |              |                           |               |      |
|                          | i. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (65) |
|                          |    |                       |           |  |              |                           |               |      |
|                          | j. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (66) |
|                          |    |                       |           |  |              |                           |               |      |
| <input type="checkbox"/> | k. | 1                     | 2         | 3                                      | 4            | 5                         | 6             | (67) |
|                          |    |                       |           |  |              |                           |               |      |

Q27 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Five (which used to be called Channel Five)? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-E AND ROTATE ORDER – TICK START

|                          |  | Agree<br>strongly | Agree | Neither<br>agree<br>nor<br>dis-<br>agree | Disagree | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-------------------|-------|--|----------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. It is important for Five to show dramas that reflect life in the UK   | 1                 | 2     | 3  | 4        | 5                         | 6             | (11) |
|                          | b. It is important for Five to show a high proportion of programmes that reflect life in the UK                  | 1                 | 2     | 3  | 4        | 5                         | 6             | (12) |
|                          | c. It is important for Five to show children's programmes that reflect life in the UK                            | 1                 | 2     | 3  | 4        | 5                         | 6             | (13) |
| <input type="checkbox"/> | d. It is important for Five to show news programmes  | 1                 | 2     | 3  | 4        | 5                         | 6             | (14) |
|                          | e. Five's digital channels (Five US and Five Life) aren't important – Five should just focus on its main channel | 1                 | 2     | 3  | 4        | 5                         | 6             | (15) |

Q28 SHOWCARD M (R) AGAIN To what extent do you agree or disagree with each of the following statements about Teletext (that is, the text pages on ITV1 and Channel 4, not text services on other channels such as Ceefax on the BBC)? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND ROTATE ORDER, TICK START

|                          |   | Agree<br>strongly | Agree | Neither<br>agree<br>nor<br>dis-<br>agree | Disagree | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-------------------|-------|--|----------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. It is important for Teletext to provide news   | 1                 | 2     | 3  | 4        | 5                         | 6             | (16) |
|                          | b. It is important for Teletext to provide current affairs  | 1                 | 2     | 3  | 4        | 5                         | 6             | (17) |
| <input type="checkbox"/> | c. It is important for Teletext to provide news about and made for people in my region            | 1                 | 2     | 3  | 4        | 5                         | 6             | (18) |
|                          | d. It is important for Teletext to provide current affairs about and made for people in my region | 1                 | 2     | 3  | 4        | 5                         | 6             | (19) |

## GENERAL VIEWS ABOUT PROGRAMME TYPES

Thank you for all your opinions so far about the quality of television. In this section of the questionnaire, we would like to ask your views about different types of programmes that are shown on television.

Q29 SHOWCARD N (R) From the following list, which are the five programme types you consider to be most valuable to you and your family personally on the main TV channels? You can pick up to five that are most important to you. CODE UP TO 5 ONLY

Q30 SHOWCARD N (R) AGAIN The previous question asked you which programme types were important to you personally. Now I would like you to think about how important these programmes are for the good of society as a whole. For example, you may personally think soaps are not important, but could still think they are important to society as a useful way of airing debates about current issues. So looking at the same list of programme types, please tell me which five you think are the most important for the main TV channels to provide for the good of society as whole. Again, you can pick up to five that you think are the most important. CODE UP TO 5 ONLY

Q31 SHOWCARD N (R) AGAIN Now thinking about programmes that are made in the UK. For which of the following do you think it is most important to be made in this country and reflect life here? Again, you can pick up to five that you think are the most important. CODE UP TO 5 ONLY

|   |  | Q29<br>(20) | Q30<br>(22) | Q31<br>(24) |
|---|--|-------------|-------------|-------------|
| A | News   | 1           | 1           | 1           |
| B | Current Affairs programme such as<br>Tonight with Trevor McDonald and<br>Panorama  | 2           | 2           | 2           |
| C | Arts and classical music   | 3           | 3           | 3           |
| D | Children's   | 4           | 4           | 4           |
| E | Religious  | 5           | 5           | 5           |
| F | Serious Factual, including history,<br>nature or science programmes  | 6           | 6           | 6           |
| G | Other factual programmes including<br>hobbies, leisure and consumer<br>affairs e.g. Masterchef, Traffic<br>Cops, and The Gadget Show | 7           | 7           | 7           |
| H | Programmes of an educational<br>nature   | 8           | 8           | 8           |
| I | Soaps  | 9           | 9           | 9           |
| J | Drama  | 0           | 0           | 0           |
| K | Films  | X           | X           | X           |
| L | Sport  | Y           | Y           | Y           |
|   |  | (21)        | (23)        | (25)        |
| M | Entertainment and contemporary<br>music e.g My Family, Strictly Come<br>Dancing and X Factor   | 1           | 1           | 1           |
| N | Comedy   | 2           | 2           | 2           |
| O | <b>1.1.1.10 News about my region</b>   | 3           | 3           | 3           |
| P | Current affairs about my region  | 4           | 4           | 4           |
| Q | Aside from news and current<br>affairs, other programmes about my<br>region  | 5           | 5           | 5           |
|   | Other (please write in and code 6)   | 6           |             |             |
|   |  |             | 6           |             |

|  |               |   |   |   |        |
|--|---------------|---|---|---|--------|
|  |               |   |   |   |        |
|  |               |   |   | 6 |        |
|  | None of these | 7 | 7 | 7 |        |
|  | Don't know    | 8 | 8 | 8 | (20-25 |

|  |
|--|
| DETAILED VIEWS TOWARDS GENRES ON INDIVIDUAL CHANNELS |
|--|

Q32 SHOWCARD O (R) I'd now like you to think about the types of programmes that TV channels provide. Some people think that there should be rules to make TV channels provide certain types of programmes, such as news, children's programmes, religious programmes, and regional programmes. Other people say that it should be left for TV channels to decide what to show. Which of these statements is closest to your own views overall? SINGLE CODE ONLY

|   |   |   |
|---|---|---|
| A | There should be rules to make <u>all</u> TV channels (that is the main TV channels and digital channels) provide certain types of programmes such as news, children's programmes, religious programmes and programmes about my region     | 1 |
| B | There should be rules to make <u>the main</u> TV channels (ie BBC One, BBC Two, ITV1, Channel Four and Five) provide certain types of programmes such as news, children's programmes, religious programmes and programmes about my region | 2 |
| C | There should be rules just to make the <u>BBC</u> provide certain types of programmes such as news, children's programmes, religious programmes and programmes about my region  | 3 |
| D | All TV channels should be free to decide for themselves what types of programmes they broadcast   | 4 |
|   | Don't know  | 5 |

(26)

INTERVIEWER: FOR Q33-35, READ OUT EACH QUESTION IN TURN FOR EACH GENRE – EG READ OUT Q33 FOR NEWS, Q34 FOR NEWS, Q35 FOR NEWS, THEN Q33 FOR CURRENT AFFAIRS, Q34 FOR CURRENT AFFAIRS, Q35 FOR CURRENT AFFAIRS, AND SO ON. ROTATE THE ORDER IN WHICH YOU ASK ABOUT EACH GENRE – IE DO NOT START WITH NEWS EACH TIME – AND TICK START. THE RESPONDENT SHOULD KEEP HOLD OF SHOWCARD P (R) THROUGHOUT THIS SECTION.

- Q33 SHOWCARD P (R) **The earlier questions asked you about the types of programmes you thought were important to you personally and for the good of society as a whole. Still thinking about the good of society, I now want you to think about how important it is that the main TV channels as a whole provide certain types of programme. So, for [READ OUT PROGRAMME TYPE], how important, if at all, do you think it is that these programmes are shown on the main TV channels as a whole?** SINGLE CODE ONLY
- Q34 SHOWCARD P (R) AGAIN **And how important, if at all, do you think it is that [READ OUT PROGRAMME TYPE] is shown on more than one of the main TV channels?** SINGLE CODE ONLY
- Q35 **And still thinking about [READ OUT PROGRAMME TYPE], please tell me whether you think there should be more, less or about the same amount of these types of programmes shown on the main TV channels than there is now?** SINGLE CODE ONLY

REPEAT Q33-35 FOR EACH PROGRAMME TYPE A-P BELOW

**A News**

|   | Very<br>import<br>ant | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (27) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (28) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (29) |

**B Current affairs**

|   | Very<br>import<br>ant | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                         | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (30) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (31) |
| Q35 More, less or about the same amount on the main TV channels?          | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (32) |



|   |                       |                        |                               |                          |                         |               |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| <b>C      News about your region</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (33) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?             | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (34) |
| Q35 More, less or about the same amount on the main TV channels?                      | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (35) |
| <b>D      Current affairs about your region</b>                                       |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (36) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?             | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (37) |
| Q35 More, less or about the same amount on the main TV channels?                      | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (38) |
| <b>E      Aside from news and current affairs, other programmes about your region</b> |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (39) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?             | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (40) |
| Q35 More, less or about the same amount on the main TV channels?                      | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (41) |
| <b>F      Programmes that are made in the UK and reflect life in the UK</b>           |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?                                     | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (42) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?             | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (43) |
| Q35 More, less or about the same amount on the main TV channels?                      | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (44) |

|   |                       |                        |                               |                          |                         |               |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| <b>G</b><br><b>Programmes that take place in different parts of the UK</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (45) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (46) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (47) |
| <b>H</b><br><b>Children's programmes that reflect life in the UK</b>  |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (48) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (49) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (50) |
| <b>I</b><br><b>Serious factual programmes for example, about nature, arts, science or history that are made in the UK</b> |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (51) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (52) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (53) |
| <b>J</b><br><b>Dramas that reflect life in the UK</b>   |                       |                        |                               |                          |                         |               |      |
|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (54) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?   | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (55) |
| Q35 More, less or about the same amount on the main TV channels?  | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (56) |

|  |                       |                        |                               |                          |                         |               |      |
|--|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| K <b>Comedies and sitcoms that are made in the UK</b>                                      |                       |                        |                               |                          |                         |               |      |
|  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (57) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (58) |
| Q35 More, less or about the same amount on the main TV channels?                           | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (59) |
| L <b>Programmes that get people interested in learning more about different topics</b>     |                       |                        |                               |                          |                         |               |      |
|  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (60) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (61) |
| Q35 More, less or about the same amount on the main TV channels?                           | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (62) |
| M <b>Religious programmes that are made in the UK</b>                                      |                       |                        |                               |                          |                         |               |      |
|  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (63) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (64) |
| Q35 More, less or about the same amount on the main TV channels?                           | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (65) |
| N <b>Programmes that appeal to a wide range of different cultural tastes and interests</b> |                       |                        |                               |                          |                         |               |      |
|  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
| Q33 Important that shown on the main TV channels?  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (66) |
| Q34 Important that shown on <u>more than one</u> of the main TV channels?                  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (67) |
| Q35 More, less or about the same amount on the main TV channels?                           | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (68) |

|        |    |
|--------|----|
| CARD 5 | 10 |
|--------|----|

|          |       |
|----------|-------|
| SKIP COL | 11-13 |
|----------|-------|

☐ **Programmes that include people from different ethnic minority groups**

☐

|  | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|--|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| Q33 Important that shown on the main TV channels?                  | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (14) |
| Q34 Important that shown on more than one of the main TV channels? | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (15) |
| Q35 More, less or about the same amount on the main TV channels?   | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (16) |

**P Additional digital channels like BBC Three, E4, Five Life and ITV2**

|   | Very<br>importa<br>nt | Quite<br>importa<br>nt | Neither<br>/ nor              | Quite<br>unimporta<br>nt | Very<br>unimporta<br>nt | Don't<br>know |      |
|---|-----------------------|------------------------|-------------------------------|--------------------------|-------------------------|---------------|------|
| INTERVIEWER READ OUT QUESTION WORDING AS SLIGHTLY DIFFERENT                                     |                       |                        |                               |                          |                         |               |      |
| Q31 Important that provided by the main television broadcasters?                                | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (17) |
| Q34 Important that more than one of the main television broadcasters provides them?             | 1                     | 2                      | 3                             | 4                        | 5                       | 6             | (18) |
| Q35 More, less or about the same amount provided by the main TV broadcasters than there is now? | More<br>1             | Less<br>2              | About the<br>same amount<br>3 | Don't<br>know<br>4       |                         |               | (19) |

Q36 SHOWCARD P (R) AGAIN **How important, if at all, is it that the main television channels as a whole provide...**

|   | Very important | Quite important | Neither / nor | Quite unimportant | Very unimportant | Don't know |      |
|---|----------------|-----------------|---------------|-------------------|------------------|------------|------|
| a. Websites that provide additional content about different topics including news and entertainment | 1              | 2               | 3             | 4                 | 5                | 6          | (20) |
| b. Websites that allow you to watch TV programmes when you want to watch them                       | 1              | 2               | 3             | 4                 | 5                | 6          | (21) |

I'd now like you to think about news and current affairs on the main TV channels as well as digital channels and the internet.

Q37 SHOWCARD Q (R) **To what extent do you agree or disagree with each of the following statements about news?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-C AND ROTATE ORDER – TICK START

|  | Agree strongly | Agree | Neither agree nor disagree | Disagree | Disagree strongly | Don't know |      |
|--|----------------|-------|----------------------------|----------|-------------------|------------|------|
| <input type="checkbox"/> a. It is important for each of the main TV channels to have at least one news programme during peak viewing hours (6pm-10.30pm) | 1              | 2     | 3                          | 4        | 5                 | 6          | (22) |
| b. Now that there are dedicated digital news channels available, there is less of a need for news bulletins on the main TV channels                      | 1              | 2     | 3                          | 4        | 5                 | 6          | (23) |
| <input type="checkbox"/> c. The internet is a better source of news than the main TV channels  | 1              | 2     | 3                          | 4        | 5                 | 6          | (24) |

Q38 SHOWCARD Q (R) AGAIN **To what extent do you agree or disagree with each of the following statements on information about current affairs programmes such as Tonight with Trevor McDonald and Panorama?** SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND REVERSE ORDER – TICK START

|   | Agree strongly | Agree | Neither agree nor disagree | Disagree | Disagree strongly | Don't know |      |
|---|----------------|-------|----------------------------|----------|-------------------|------------|------|
| <input type="checkbox"/> a. The main TV channels shouldn't be made to show current affairs programmes, there's plenty of choice on the digital channels | 1              | 2     | 3                          | 4        | 5                 | 6          | (25) |
| <input type="checkbox"/> b. The internet is a better source of information about current affairs than the main TV channels                              | 1              | 2     | 3                          | 4        | 5                 | 6          | (26) |

I'd now like you to think about news about this region

Q39 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about news about your region? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A-D AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Television is an important source of news about my region  | 1                     | 2     | 3  | 4            | 5                         | 6             | (27) |
|                          | b. It is important for ITV1 as well as the BBC to show news programmes about my region  | 1                     | 2     | 3  | 4            | 5                         | 6             | (28) |
| <input type="checkbox"/> | c. News about my region is of a generally high standard   | 1                     | 2     | 3  | 4            | 5                         | 6             | (29) |
|                          | d. The main TV channels shouldn't be made to show news programmes about my region, there's plenty of news on the internet about my region | 1                     | 2     | 3  | 4            | 5                         | 6             | (30) |

Q40 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about programmes about your region aside from news and current affairs? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS (A-F) AND ROTATE ORDER – TICK START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a. Other than the news and current affairs, programmes about my region are of no interest to me | 1                     | 2     | 3  | 4            | 5                         | 6             | (31) |
|                          | b. It is important to show programmes that take place in different parts of the UK              | 1                     | 2     | 3  | 4            | 5                         | 6             | (32) |
| <input type="checkbox"/> | c. Broadcasters shouldn't be made to show set amounts of programmes about my region             | 1                     | 2     | 3  | 4            | 5                         | 6             | (33) |
|                          | ASK ONLY IN NORTHERN IRELAND  |                       |       |  |              |                           |               | (34) |
| d.                       |   |                       |       |  |              |                           |               | (35) |
| e.                       |   |                       |       |  |              |                           |               | (36) |
| f.                       | ASK ONLY IN SCOTLAND/   |                       |       |  |              |                           |               | (37) |
| g.                       | ASK ONLY IN WALES   |                       |       |  |              |                           |               | (37) |

ASK ALL

I'd now like to you to think about how you find out information about your local area.

Q41 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree with the following statements about information about your local area? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS A AND B AND REVERSE ORDER – TICK BOX START

|                          |  | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|--|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a I would like the main TV channels to show programmes that give me news and information about my local area | 1                     | 2     | 3  | 4            | 5                         | 6             | (38) |
| <input type="checkbox"/> | b Websites about my local area are a better way of finding out information for me than the main TV channels  | 1                     | 2     | 3  | 4            | 5                         | 6             | (39) |

I'd now like you to think about children's programmes on television.

Q42 SHOWCARD Q (R) AGAIN To what extent do you agree or disagree the following statements about children's programmes on television? SINGLE CODE ONLY FOR EACH LINE. READ OUT STATEMENTS AND REVERSE ORDER – TICK BOX START

|                          |   | Agree<br>strongl<br>y | Agree | Neithe<br>r<br>agree<br>nor<br>dis-<br>agree | Disagre<br>e | Dis-<br>agree<br>strongly | Don't<br>know |      |
|--------------------------|---|-----------------------|-------|--|--------------|---------------------------|---------------|------|
| <input type="checkbox"/> | a It is important that TV channels other than the BBC provide children's programmes that reflect life in the UK           | 1                     | 2     | 3  | 4            | 5                         | 6             | (40) |
|                          | b The main TV channels should provide programmes for teenagers that reflect life in the UK                                | 1                     | 2     | 3  | 4            | 5                         | 6             | (41) |
|                          | c The main TV channels don't need to provide programmes for teenagers as there's plenty of choice on the digital channels | 1                     | 2     | 3  | 4            | 5                         | 6             | (42) |
| <input type="checkbox"/> | d Websites are a better way of providing content for teenagers than the main TV channels                                  | 1                     | 2     | 3  | 4            | 5                         | 6             | (43) |



Q43

**SHOWCARD R (R) In the future, it may be the case that the main TV channels may not be able to provide all of the types of content that we have been talking about. For each of the content types that I'm about to read out, please can you tell me which of these statements is closest to your views? If you agree with statements B, C, and D please say so. CAN MULTICODE B, C AND D (DIGITAL CHANNELS AND INTERNET) OTHERWISE SINGLE CODE. READ OUT STATEMENTS A-M AND ROTATE ORDER – TICK BOX START**

|                          |  | A) This needs to be shown on the main TV channels | B) This doesn't need to be shown on the main TV channels so long as people can get it on digital channels provided by the main TV broadcasters (e.g. BBC Three, E4, Five Life, ITV2.) | C) This doesn't need to be shown on the main TV channels as the other digital channels provide this type of content (e.g. Sky One, Sky News, Living, Sky Sports, Sky Movies) | D) This doesn't need to be shown on the main TV channels so long as people can get this type of content on the internet | Don't know |      |
|--------------------------|--|---|---|--|---|------------|------|
| <input type="checkbox"/> | a. <b>News</b>   | 1   | 2   | 3  | 4   | 5          | (44) |
|                          | b. <b>Current affairs</b>  | 1   | 2   | 3  | 4   | 5          | (45) |
|                          | c. <b>News and information about your region</b>   | 1   | 2   | 3  | 4   | 5          | (46) |
|                          | d. <b>News and information about your local area</b>   | 1   | 2   | 3  | 4   | 5          | (47) |
|                          | e. <b>Children's programmes that reflect life in the UK</b>  | 1   | 2   | 3  | 4   | 5          | (48) |
| <input type="checkbox"/> | f. <b>Serious factual programmes (for example, about nature, science or history)</b>                   | 1   | 2   | 3  | 4   | 5          | (49) |
|                          | g. <b>Drama that reflects life in the UK</b>   | 1   | 2   | 3  | 4   | 5          | (50) |
|                          | h. <b>Programmes for schools (for example, BBC Learning Zone and Channel 4 Programmes for Schools)</b> | 1   | 2   | 3  | 4   | 5          | (51) |
|                          | i. <b>Entertainment</b>  | 1   | 2   | 3  | 4   | 5          | (52) |
|                          | j. <b>Sports</b>   | 1   | 2   | 3  | 4   | 5          | (53) |
| <input type="checkbox"/> | k. <b>Programmes that get people interested in learning about different topics</b>                     | 1   | 2   | 3  | 4   | 5          | (54) |

|    |  |   |   |   |   |   |          |
|----|--|---|---|---|---|---|----------|
| l. | <b>Arts programmes<br/>made in the UK</b>          | 1 | 2 | 3 | 4 | 5 | (55<br>) |
|    | <b>Religious<br/>programmes<br/>made in the UK</b> | 1 | 2 | 3 | 4 | 5 | (56<br>) |

Q44 SHOWCARD S (R) **Finally, thinking about everything we have talked about today, how satisfied or dissatisfied are you with...? READ OUT A-D SINGLE CODE ONLY**

|    |   | Very<br>satisfied | Fairly<br>satisfied | Neither<br>/nor | Fairly<br>dissatisfie<br>d | Very<br>dissatis<br>fied | Don't<br>know |          |
|----|---|-------------------|---------------------|-----------------|----------------------------|--------------------------|---------------|----------|
| a. | <b>The main TV channels</b>   | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (57<br>) |
| b. | <b>The digital channels provided by the main TV broadcasters – BBC Three, E4, Five Life, ITV2 and so on</b> | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (58<br>) |
| c. | <b>Other digital TV channels – eg Sky One, Sky News, Living, Sky Sports, Sky Movies and so on</b>           | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (59<br>) |
| d. | <b>All the TV that is available to you as a whole</b>   | 1                 | 2                   | 3               | 4                          | 5                        | 6             | (60<br>) |

**Thank you very much for your time – your views will make a difference to the future of television in the UK. I now just need to ask you some questions about yourself to help us analyse the results – PLEASE GO TO DEMOGRAPHICS**

**THIS MUST BE THE LAST PAGE OF THE QUESTIONNAIRE AND MUST BE SINGLE SIDED**

Ipsos MORI/31644bb02  
1-5

Questionnaire No:

| Serial No |
|-----------|
| OUO (6-9) |
| CARD 10   |

**Ofcom PSB Survey – Rural Boost  
Final Questionnaire**

Interviewer Number:

-      (11) (12) (13) (14) (15) (16) (11-16)

Name/Initial/Title: Mr/Mrs/Ms/Miss

Address:

Full Postcode

QTEL1 **Do you have a fixed line telephone at home which you use for incoming and outgoing voice calls?**

|                       |   |
|-----------------------|---|
| Yes                   | 1 |
| WRITE IN Full tel. No |   |
| No                    | 2 |
| Refused               | 3 |
| Ex-directory          | 4 |

GO TO QTEL2

QTEL2 **ASK IF NO FIXED LINE/REFUSED/EX-DIRECTORY (CODES 2-4). OTHERS CLOSE**  
**Can I just check, do you have a mobile phone? IF YES ASK: Can I take the number please?**

|                       |   |
|-----------------------|---|
| Yes                   | 1 |
| WRITE IN Full tel. No |   |
| No                    | 2 |
| Refused               | 3 |

**IT IS VERY IMPORTANT THAT YOU FILL IN THE SAMPLE POINT NUMBER, QUESTIONNAIRE NUMBER AND INTERVIEWER NUMBER ON BOTH THE FRONT AND BACK PAGE OF THE QUESTIONNAIRE.**

Please look on the intranet under documents/data protection for examples of agreement to re-contact respondents and consent forms