

Audience attitudes to programme standards

Cross Platform Media Tracker 2020

Produced by: BVA BDRC

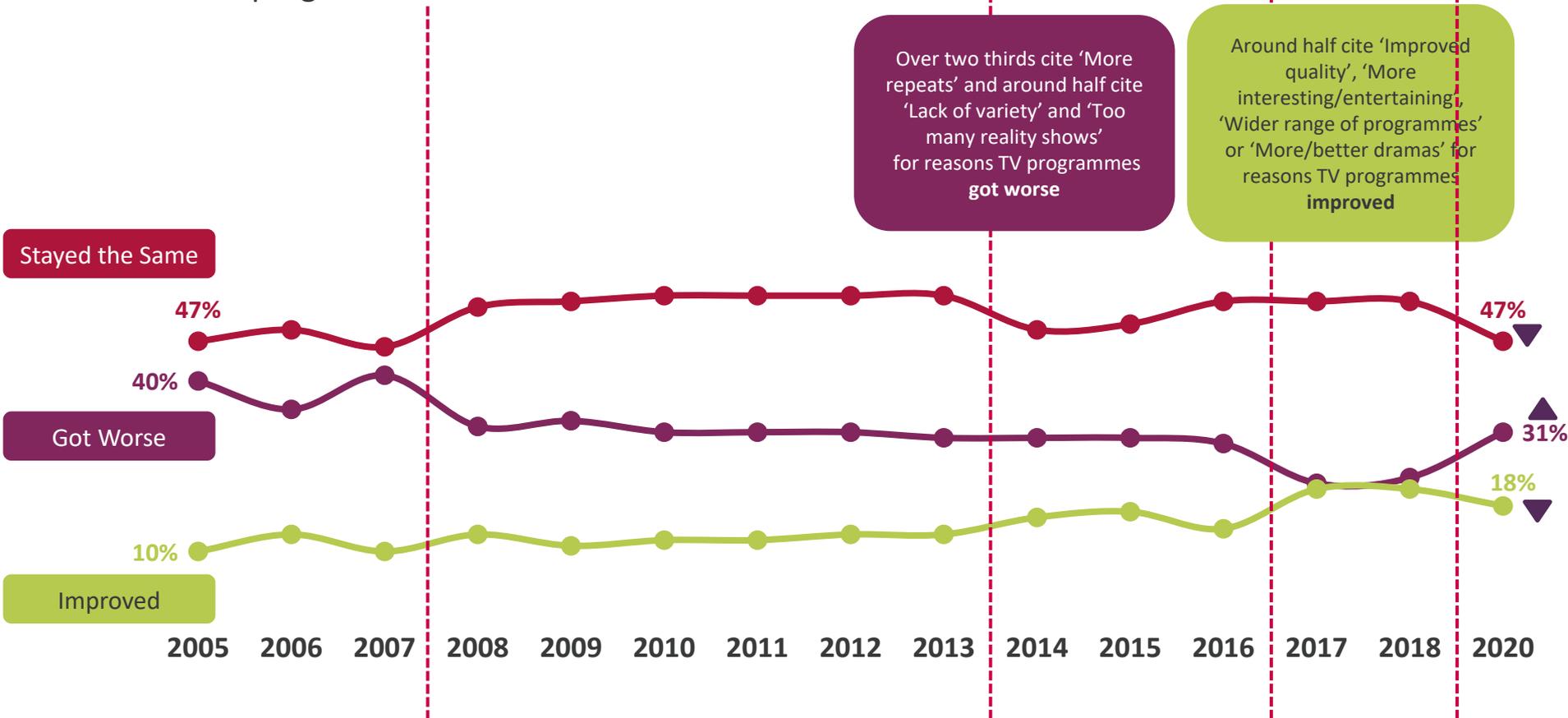
Fieldwork: January-December 2020

Attitudes towards programme standards: Summary of key findings

- Attitudes towards television programme standards have remained broadly similar to what we have seen in previous years.
 - Just under half of UK adults (47%) feel TV programme standards stayed the same in 2020.
 - Around a third of UK adults (31%) say programmes have worsened over the last year. This is particularly the case among the older age groups (36% of 55-64s, 49% of 65+), non parents (34%) and C2DEs (34%). The main reasons given for declining perceptions of programmes are too many repeats and lack of variety.
 - Just under one in five (18%) say television programmes have improved over the last year. Younger adults aged 16-34 (25%), and parents (28%) are significantly more likely than average to say programmes have improved – with quality and range being the driving factors.
- Around one in five adults (18%) say they have seen something offensive on television in the last year. This has remained consistent over time. As in previous years, older adults (27% of those aged 65+) are more likely to be offended by something on TV than younger people (13% of 16-34 year olds).
- Violence, sexual content, and bad language are the most likely types of material to be cited by those offended. There are also a range of mentions relating to discriminatory treatment or portrayal. Two fifths (39%) of all adults mention some kind of discrimination, and this is significantly higher among 16-24 year olds, with 65% mentioning this.
- On prompting with a direct question, a third feel there is ‘too much’ violence and ‘too much’ swearing on TV and around a quarter feel there is ‘too much’ sex.
- A third of those offended by something on TV feel that the things that offended them should not have been shown.
- Those who found something offensive on TV are most likely to respond by switching over the channel.
- Fewer than one in twenty (5%) report hearing something offensive on the radio in 2020.

Just under half of UK adults feel TV programmes have remained the same over the past year, a small decrease from 2018. Conversely, the proportion saying programmes have got worse has increased

Attitudes towards programme standards over time: historical view



QB1 – Do you feel that over the past year television programmes have improved, got worse or stayed about the same?

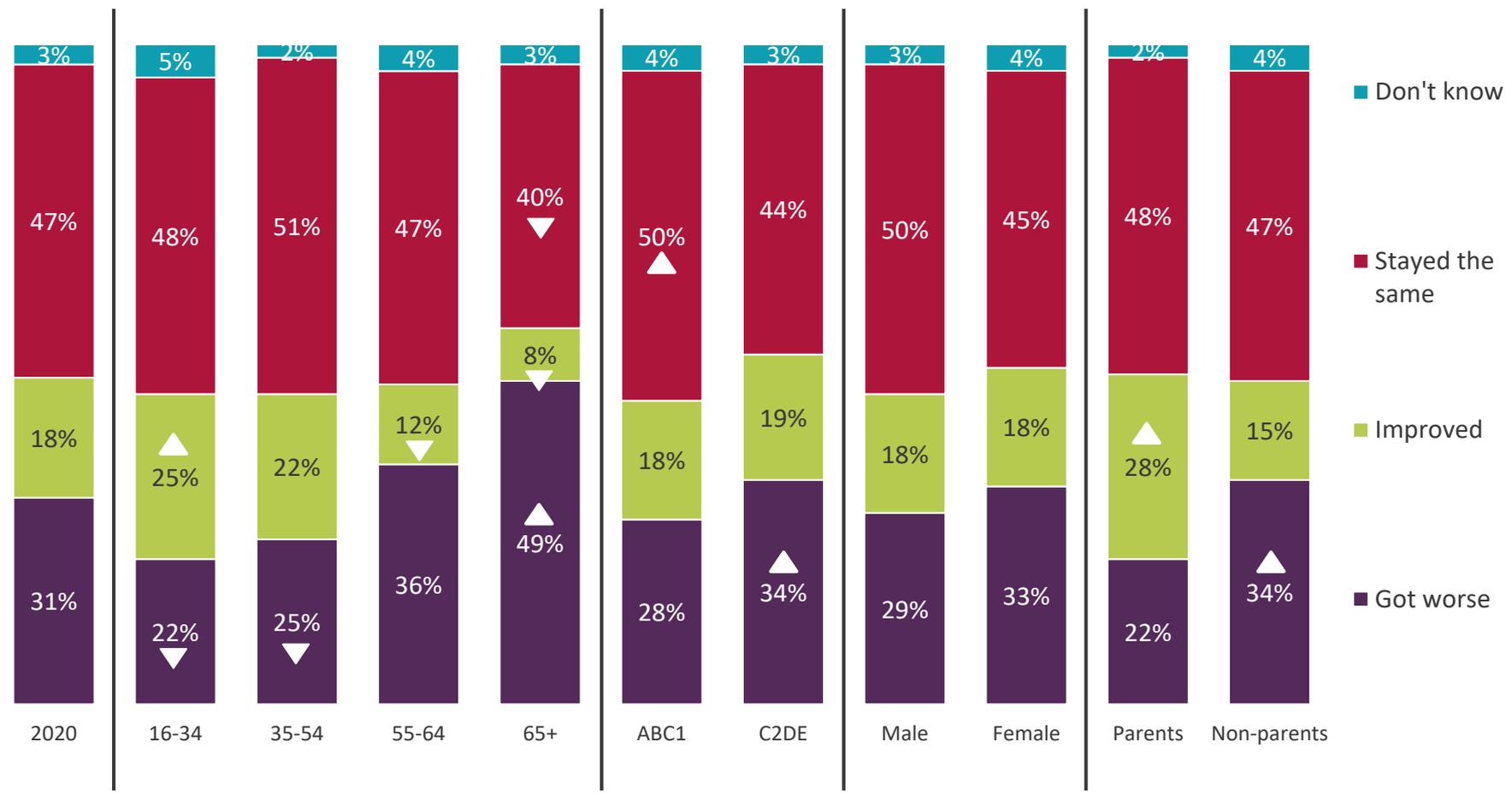
Base: All with any TV sets (2417). NB Base prior to 2014: All with TV, but excluding those never watching. Significance testing shows any difference between 2018 and 2020. Dashed line to show where survey method changed.

Source: Cross Platform Media Tracker 2020

Older adults less likely to say TV programmes have improved and more likely to say they have worsened over the past year



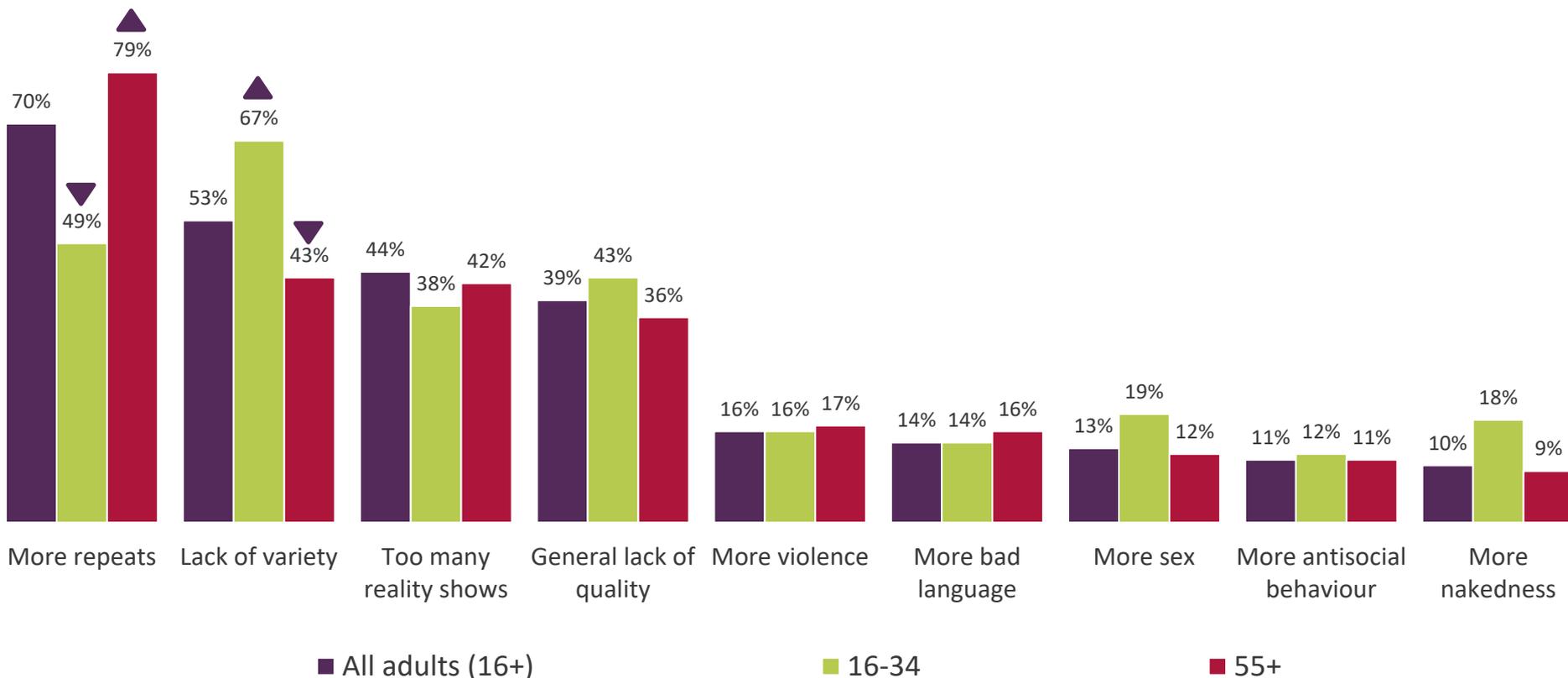
Opinion on the quality of programmes over the last 12 months: 2020 sub-groups



QB1 – Do you feel that over the past year television programmes have improved, got worse or stayed about the same?
 Base: All with any TV sets in 2020 (2417); aged 16-34 (627); 35-54 (783); 55-64 (369); 65+ (638); ABC1 (1301); C2DE (1116); Male (1119); Female (1298); Parents (614); Non-parents (1803). Significance testing shows any difference between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2020
 Source: Cross Platform Media Tracker 2020

Among those who say TV programmes worsened over the past year, seven in ten cite 'more repeats' and around half cite 'lack of variety' and 'too many reality shows'

Top reasons given for programmes getting worse: 2020, by age (combined unprompted CAPI, CATI and prompted online data)



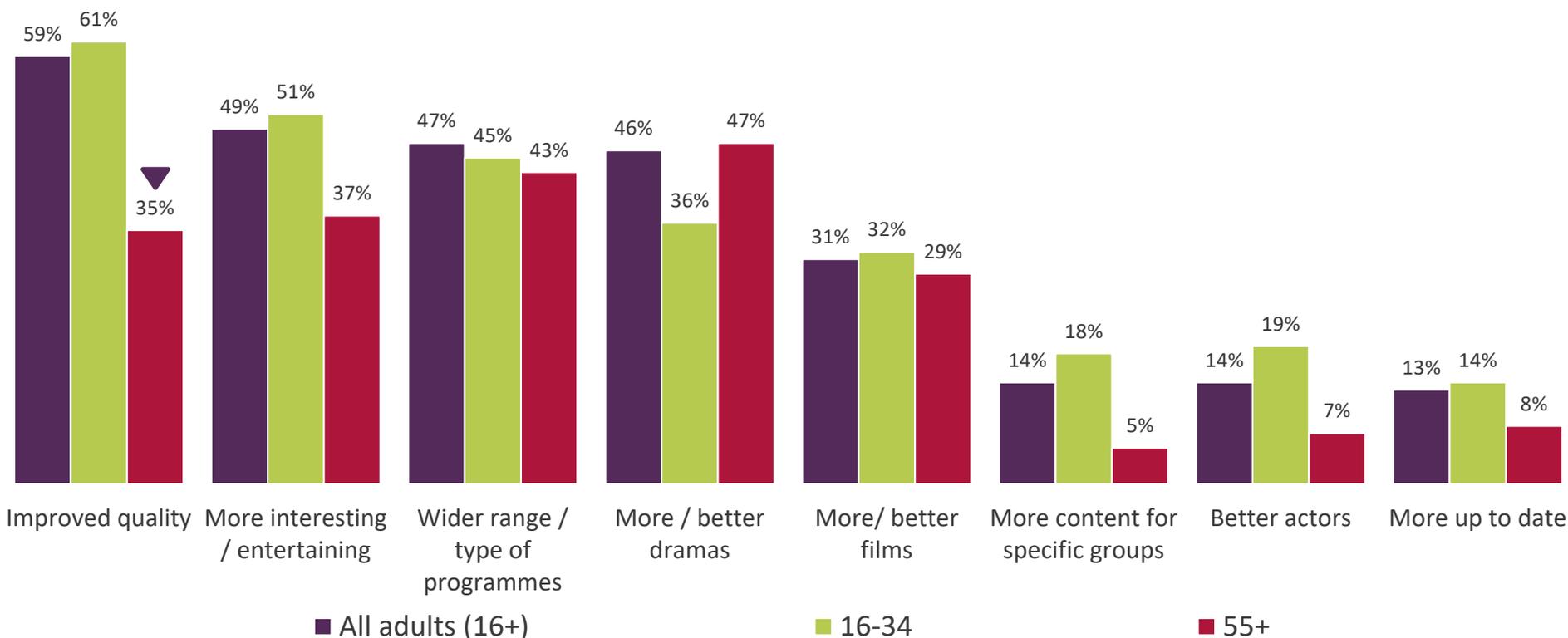
QB3 – In what ways do you think that television programmes have got worse over the past year?

Base: All saying programmes 'got worse' over the past year (805); 16-34 (143); 55+ (444). CAPI, CATI unprompted/online prompted, multicode. Only top 9 individual responses are shown. Significance testing shows any difference between either age group and all adults in 2020.

Source: Cross Platform Media Tracker 2020

Around half of those who say TV programmes have improved over the past year cite ‘improved quality’, ‘more interesting/entertaining’, ‘wider range/type of programmes’ or ‘more/better dramas’

Top reasons given for programmes having improved: 2020, by age (combined unprompted CAPI, CATI and prompted online data)



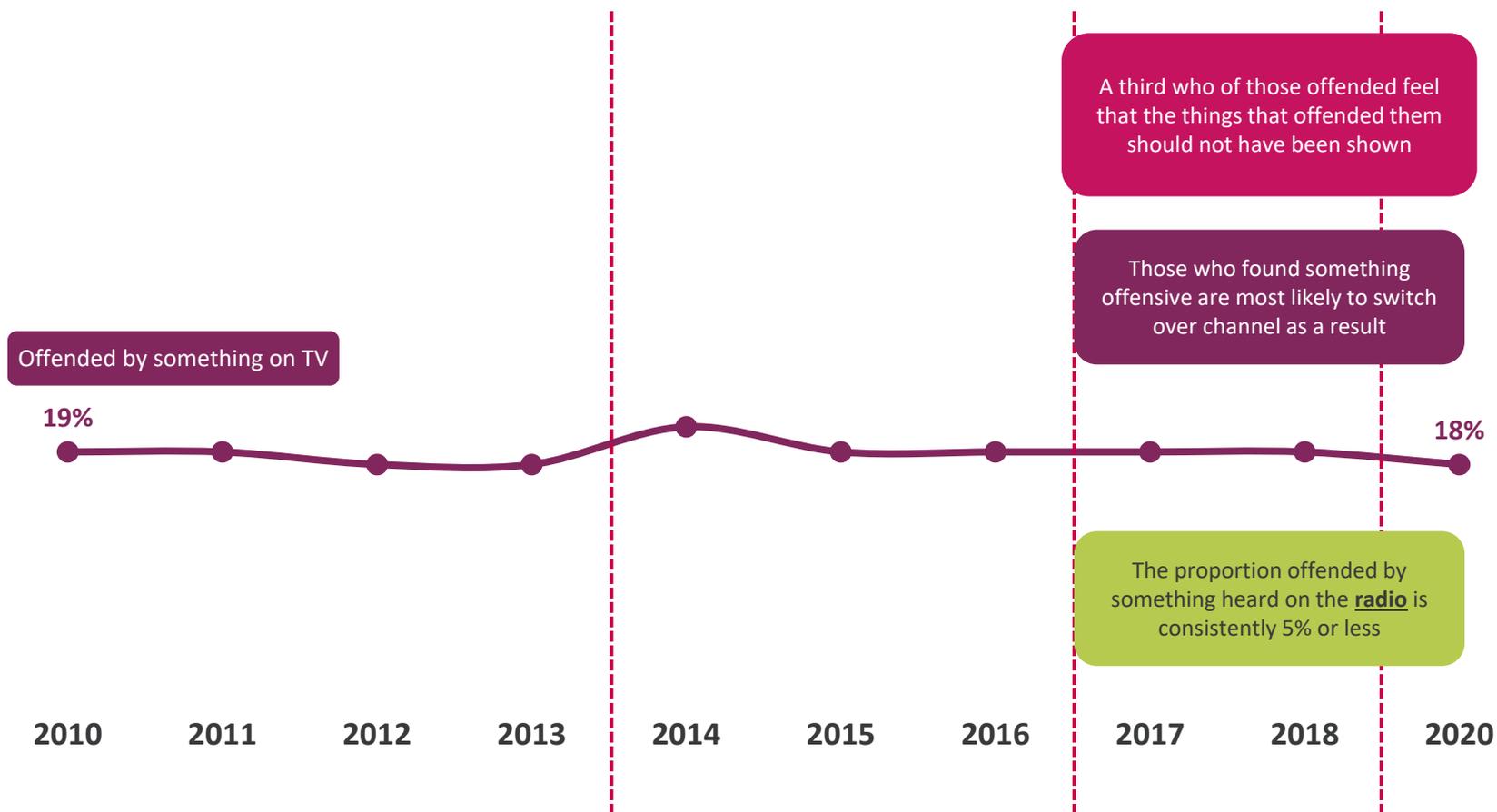
QB2 – In what ways do you think that television programmes have improved over the past year?

Base: All saying programmes ‘improved’ over the past year (408); 16-34 (170); 55+ (80*). CAPI, CATI unprompted/online prompted, multicode. Only top individual responses are shown. Significance testing shows any difference between either age group and all adults in 2020. *LOW BASE SIZE <100

Source: Cross Platform Media Tracker 2020

Levels of offence related to television programming remain consistent over time. Older UK adults are more likely to find something on TV to be offensive than younger adults

Overall % of respondents who have been offended by something on TV: historical view



QF1 – In the last 12 months, have you personally found anything on television to be offensive?

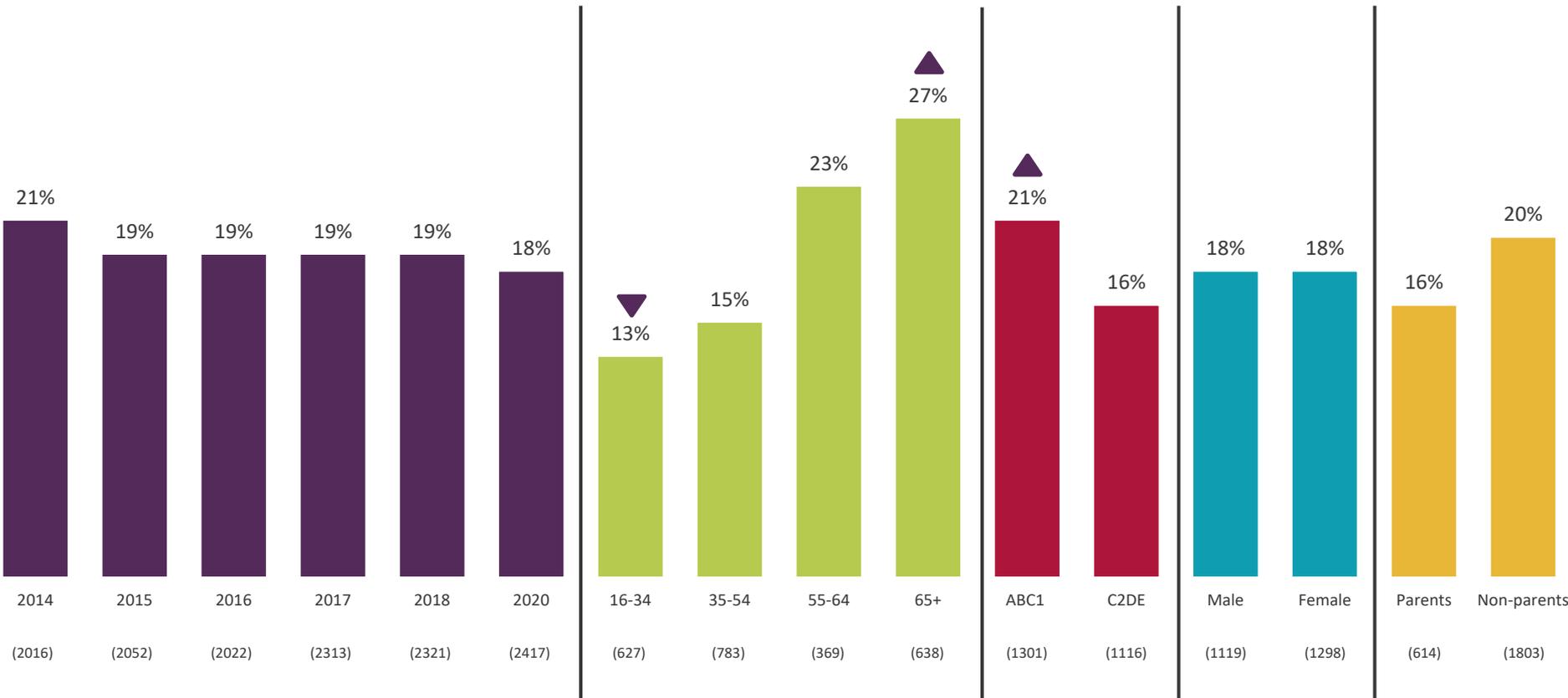
Base: All with any TV sets (2417). Prompted, single code. Significance testing shows any difference between 2018 and 2020. Base pre-2014: All respondents. Dashed line to show where survey method changed.

Source: Cross Platform Media Tracker 2020

Older adults are more likely to find something offensive on TV, whereas younger adults are less likely



Overall % with a TV who have been offended by something on TV: 2014-2020 and 2020 sub-groups

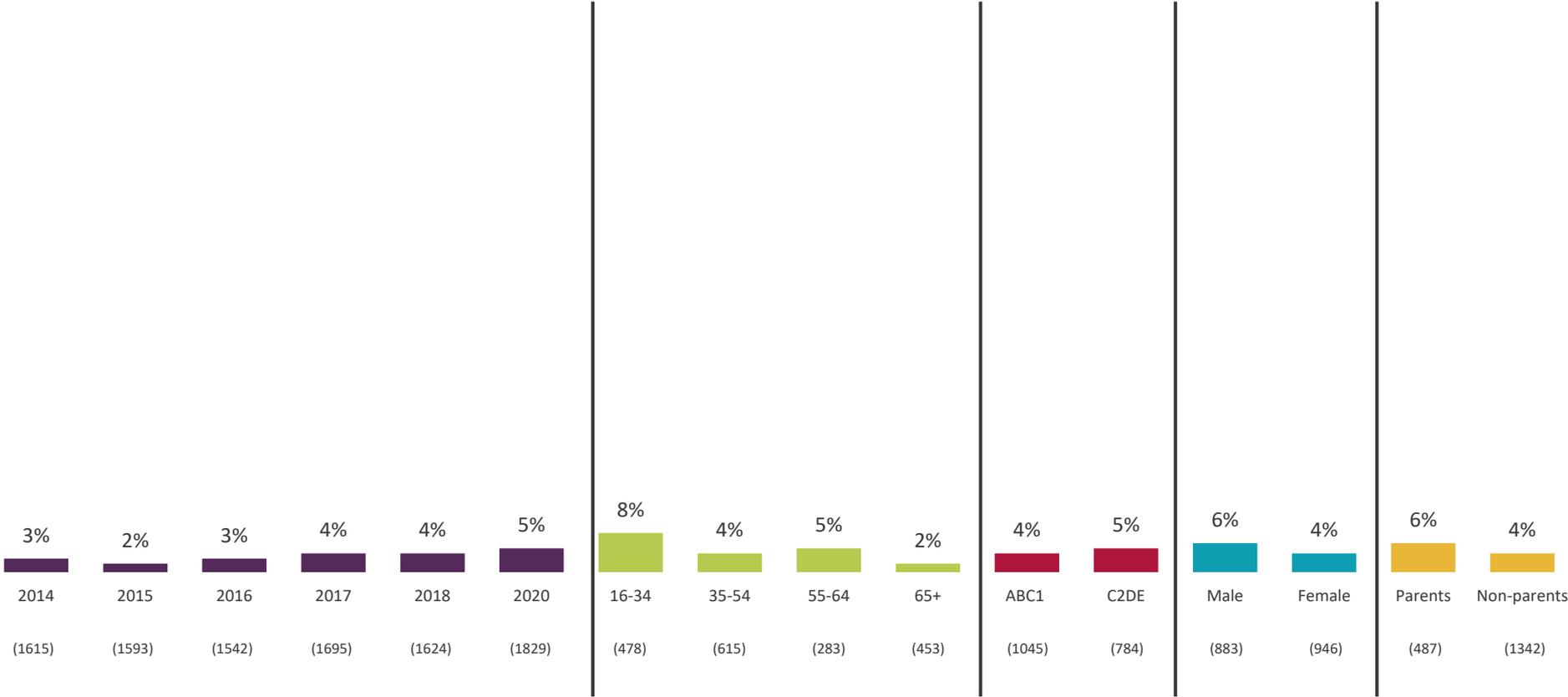


QF1 – In the last 12 months, have you personally found anything on television to be offensive?
 Base: All with any TV sets (as indicated on chart). Prompted, single code. Significance testing shows any difference between 2018 and 2020, between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2020
 Source: Cross Platform Media Tracker 2020

The proportion of radio listeners finding something offensive on radio is consistently low over time



Overall % of radio listeners who have been offended by something on radio: 2014-2020 and 2020 sub-groups



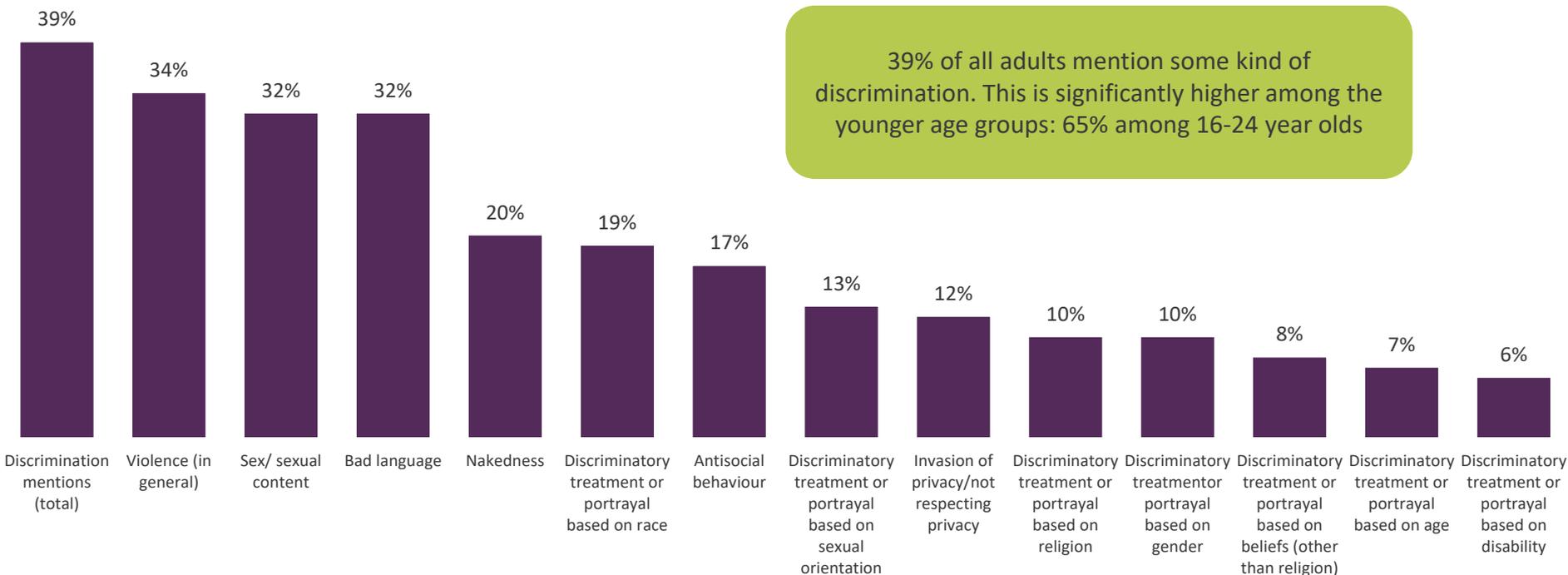
QG8 – In the last 12 months, have you personally found anything on the radio to be offensive?

Base: All who ever listen to radio (as indicated on chart). Prompted, single code. Significance testing shows any difference between 2018 and 2020, between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2020

Source: Cross Platform Media Tracker 2020

Violence, sexual content, and bad language are the most likely types of material to be cited by those offended. There are also a range of mentions relating to discriminatory treatment of portrayal. In total, 39% of all adults mention some kind of discrimination

Type of material on TV which offended: 2020
(combined unprompted CAPI, CATI and prompted online data)



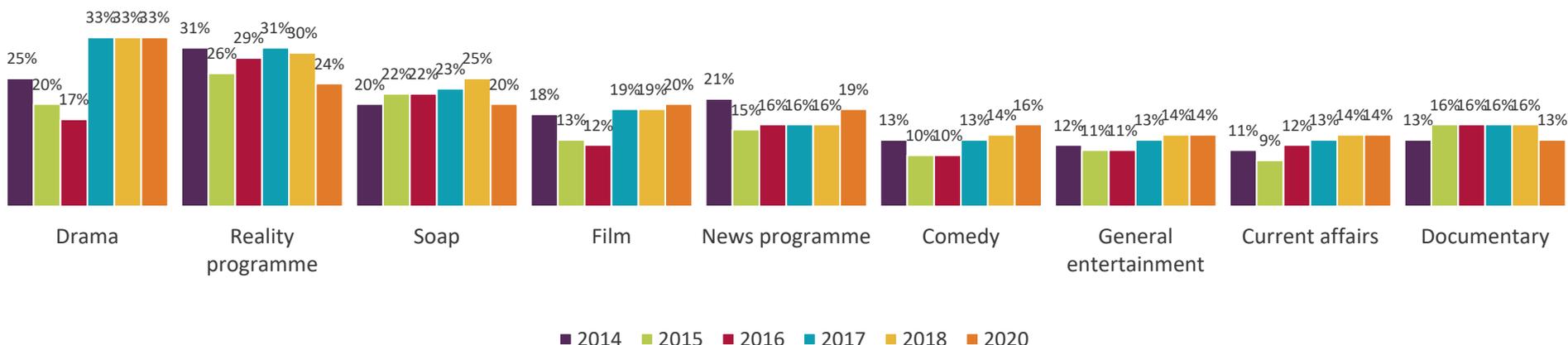
QF2 – What kind of things offended you?

Base: All who said they'd seen something offensive in the last 12 months (18% of adults with any TV sets) (482). CAPI, CATI unprompted/online prompted, multicode. Top reasons charted. (over 10%)

Source: Cross Platform Media Tracker 2020

The types of programmes where offence was found are diverse, led by drama and reality programmes

Type of programme which had offensive content: 2014-2020



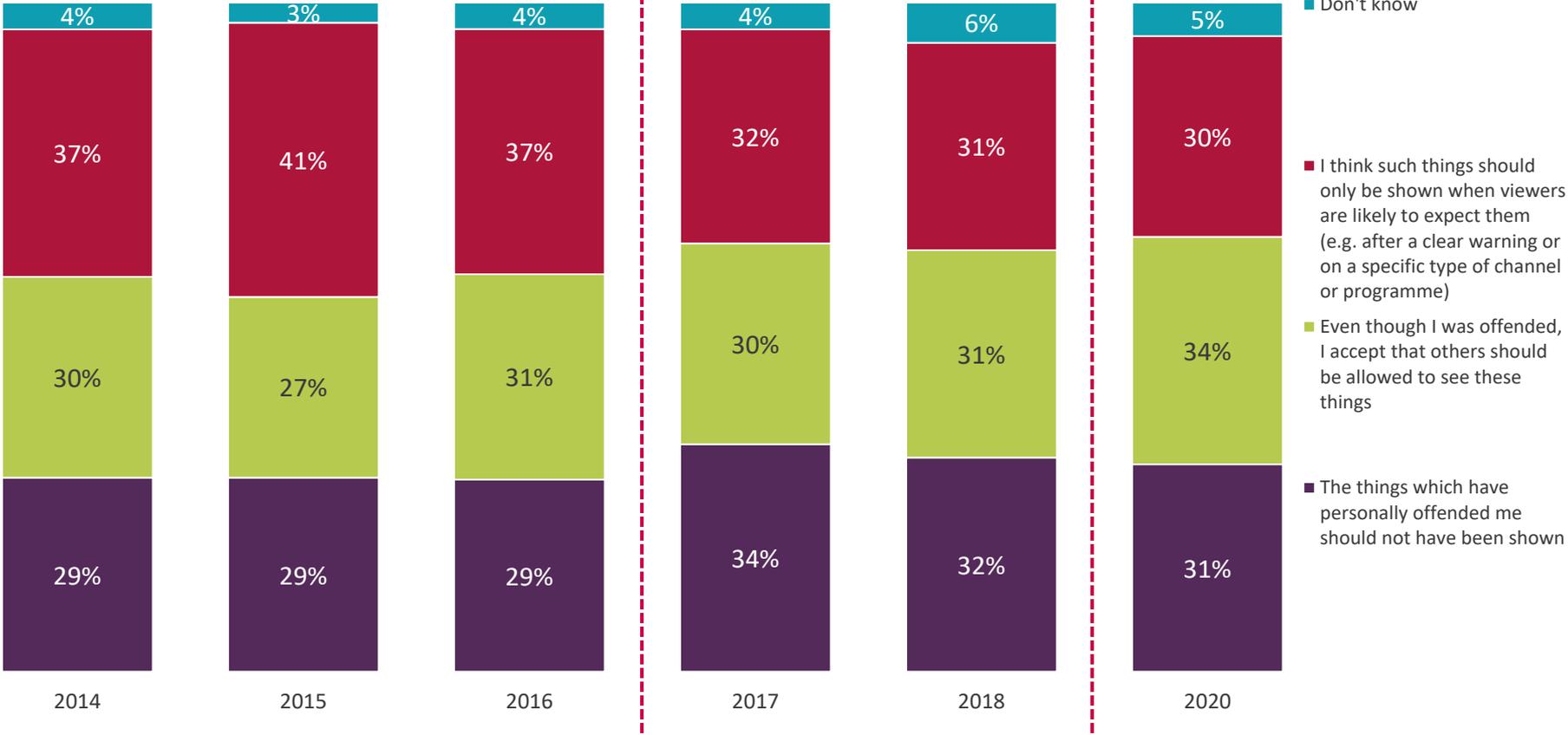
QF3 – Can you say what type of programme or show it was that offended you?

Base: All who said they'd seen something offensive in the last 12 months (19% of adults in 2017 with any TV sets) – 2014 (421); 2015 (398); 2016 (391), 2017 (435), 2018 (433), 2020 (482). Prompted, multicode. Top reasons charted (over 10%). Significance testing shows any difference between 2018 and 2020.

Source: Cross Platform Media Tracker 2020

A third of those who had seen something offensive in the last 12 months feel that the things that offended them should not have been shown

Attitudes towards offensive material: 2014-2020



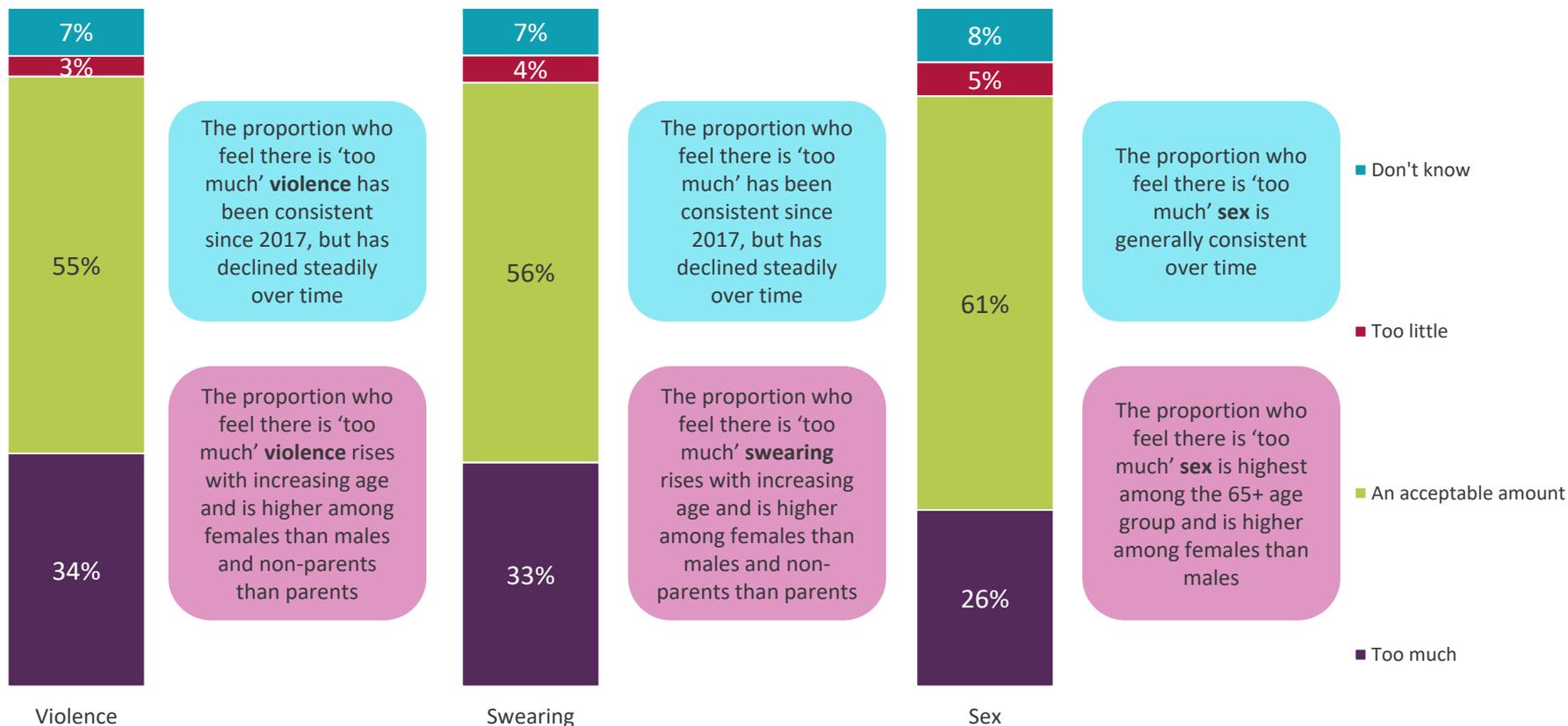
QF5 – Which of these statements best describes your attitude towards the things which have offended you on TV in the last 12 months?

Base: All who said they'd seen something offensive in the last 12 months (18% of adults with any TV sets) 2014 (421); 2015 (398); 2016 (391); 2017 (435); 2018 (433), 2020 (482). Prompted, single code. Significance testing shows any difference between 2018 and 2020.

Source: Cross Platform Media Tracker 2020

A third feel there is 'too much' violence and 'too much' swearing on TV, whilst around a quarter feel there is 'too much' sex

Opinion on the amount of sex/ violence/ swearing on TV: 2020

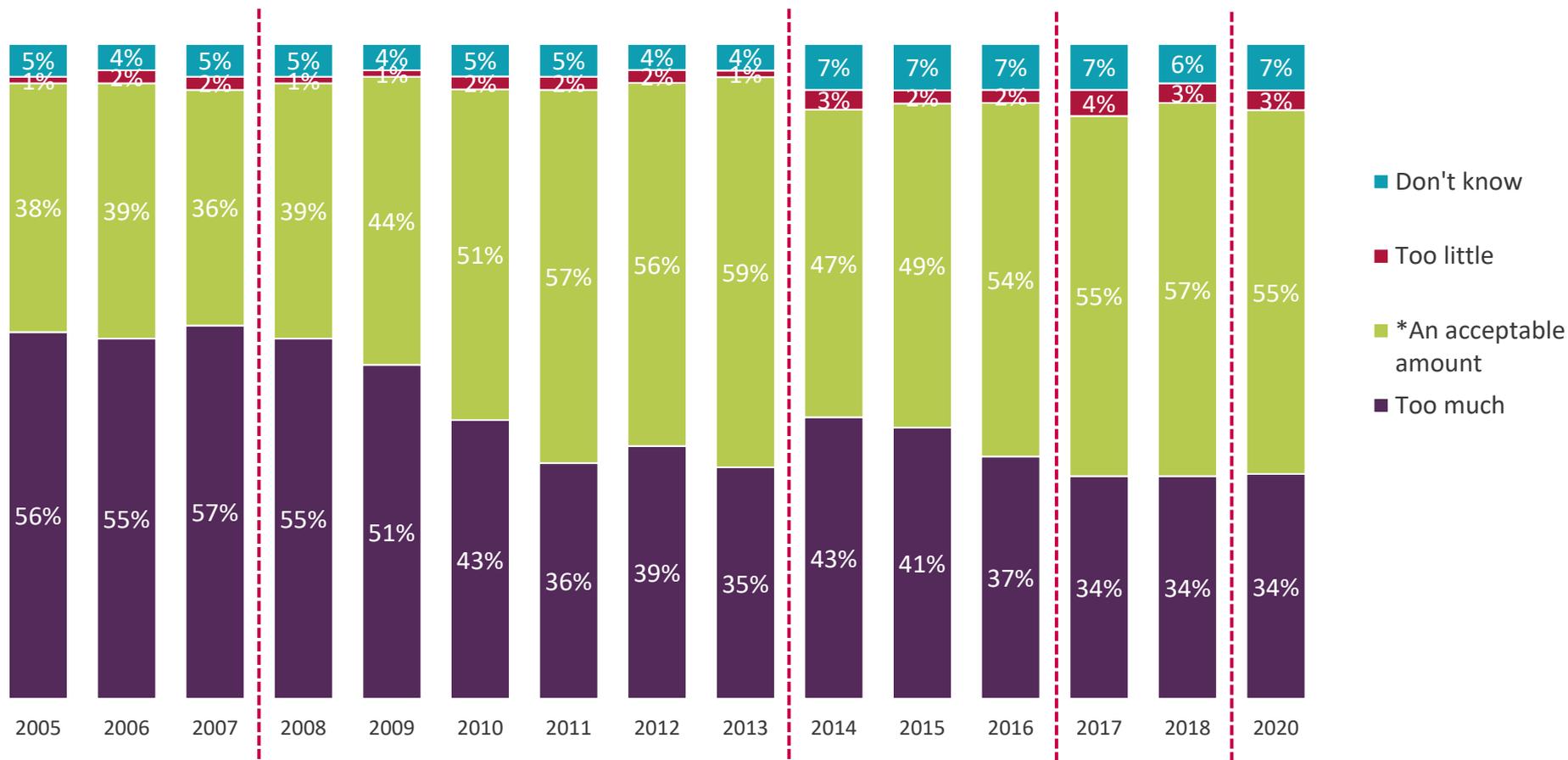


QF6 – Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television? Sex? Violence? Swearing?

Base: All with any TV sets in 2020 (2417). Prompted, single code.

The proportion of those who feel that there is 'too much' violence on TV has been consistent since 2017, but has declined steadily over time

Opinion on the amount of violence on TV: historical view



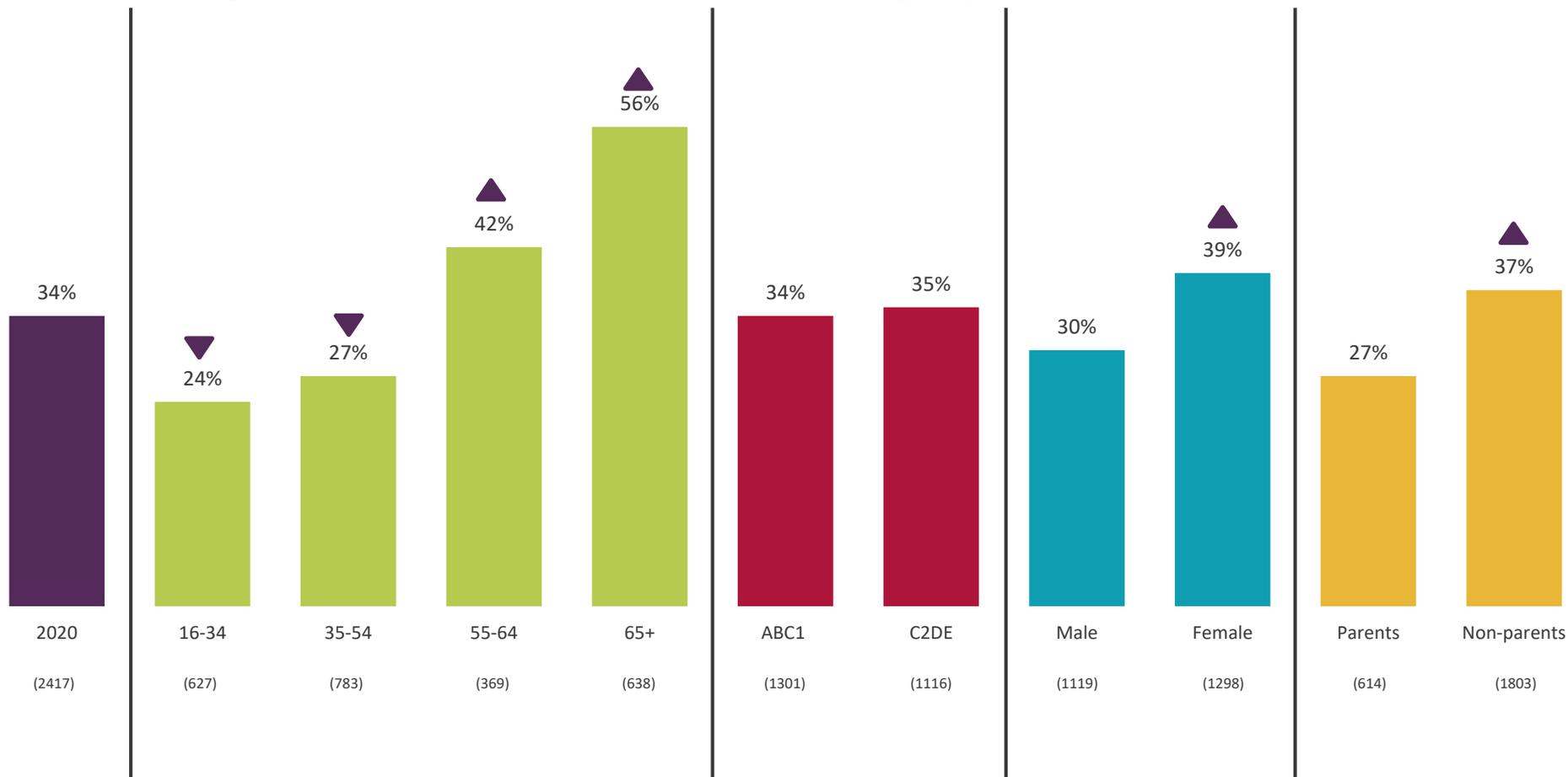
QF6B – Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television? Violence?

Base: All with any TV sets in 2020 (2417). Prompted, single code. Significance testing shows any difference between 2018 and 2020. Base pre-2014: All with TV, but excluding those never watching. *Pre-2014 'About the right amount'. Dashed line to show where survey method changed.

Source: Cross Platform Media Tracker 2020

Those in the 65+ age band are more likely to think that there is 'too much' violence on TV compared to adults overall

Overall % stating there is too much violence on TV: 2020 sub-groups



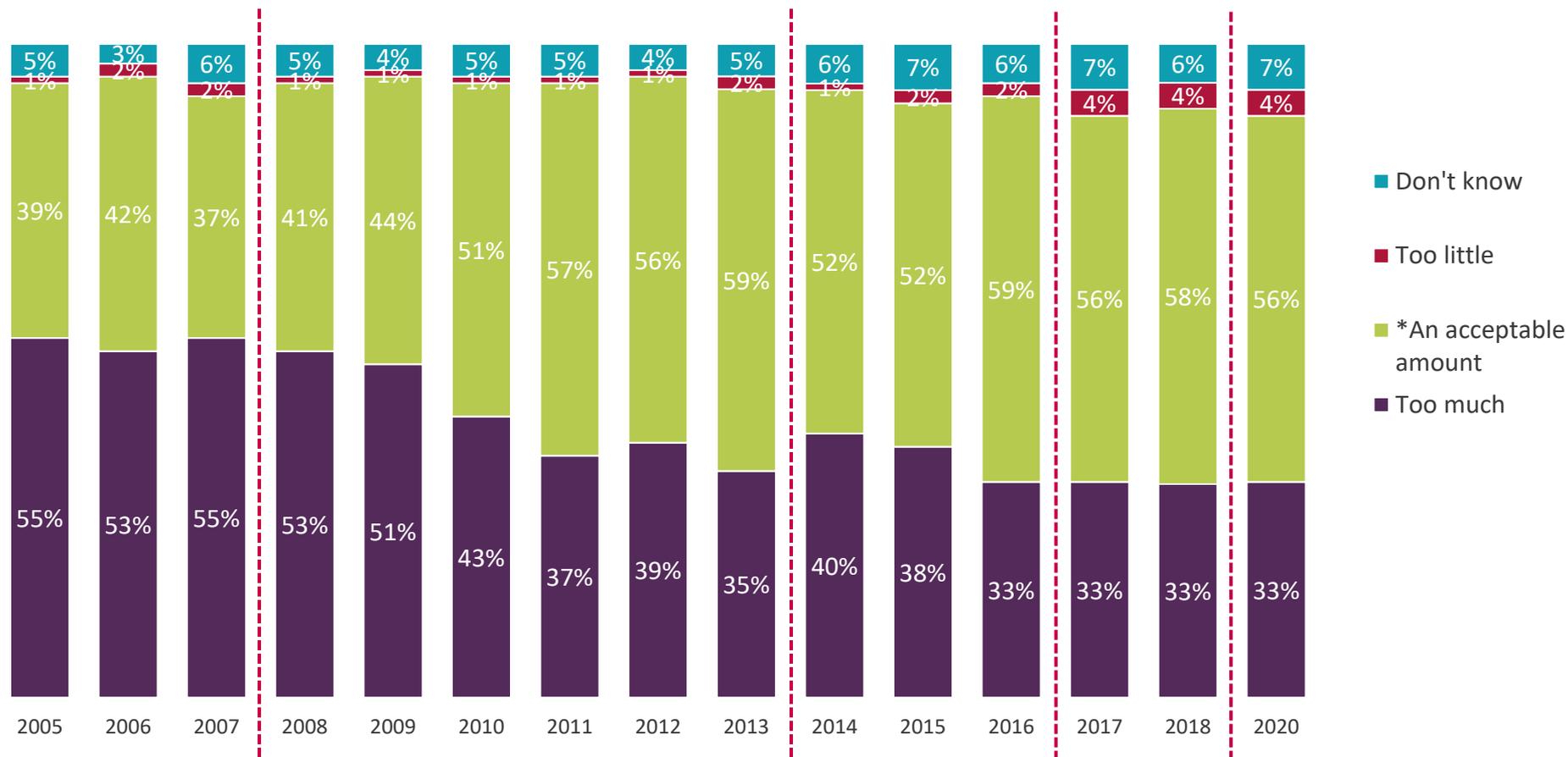
QF6B – Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television? Violence?

Base: All with any TV sets (as indicated on chart). Prompted, single code. Significance testing shows any difference between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2020

Source: Cross Platform Media Tracker 2020

The proportion of those who feel that there is 'too much' swearing on TV has been consistent since 2017, but has declined steadily over time

Opinion on the amount of swearing on TV: historical view



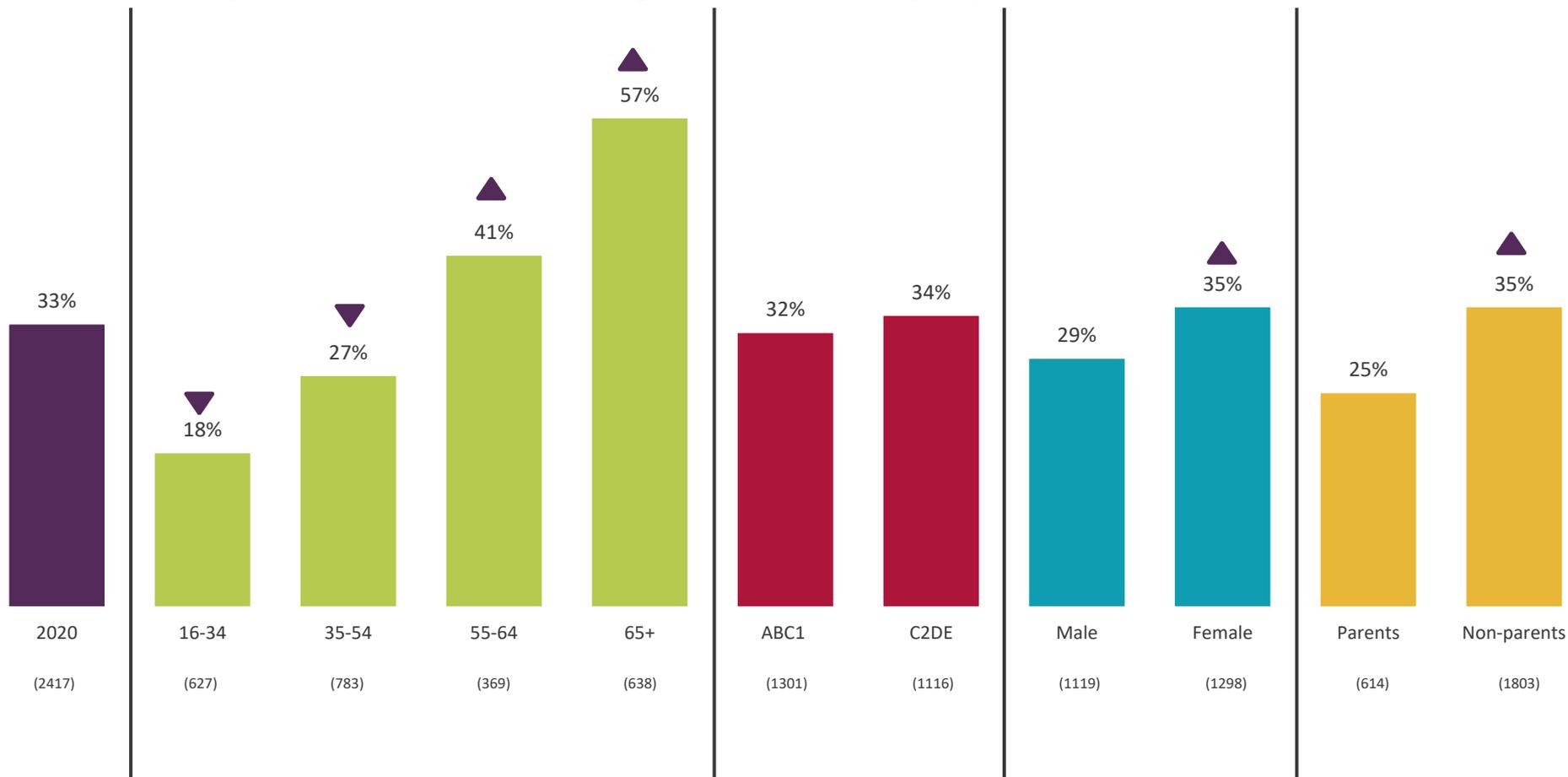
QF6C – Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television? Swearing?

Base: All with any TV sets in 2020 (2417). Prompted, single code. Significance testing shows any difference between 2018 and 2020. Base pre-2014: All with TV, but excluding those never watching. *Pre-2014 'About the right amount'

Source: Cross Platform Media Tracker 2020

Over half of those aged 65+ think there is 'too much' swearing on TV – over three times higher than 16-34s

Overall % stating there is too much swearing on TV: 2020 sub-groups



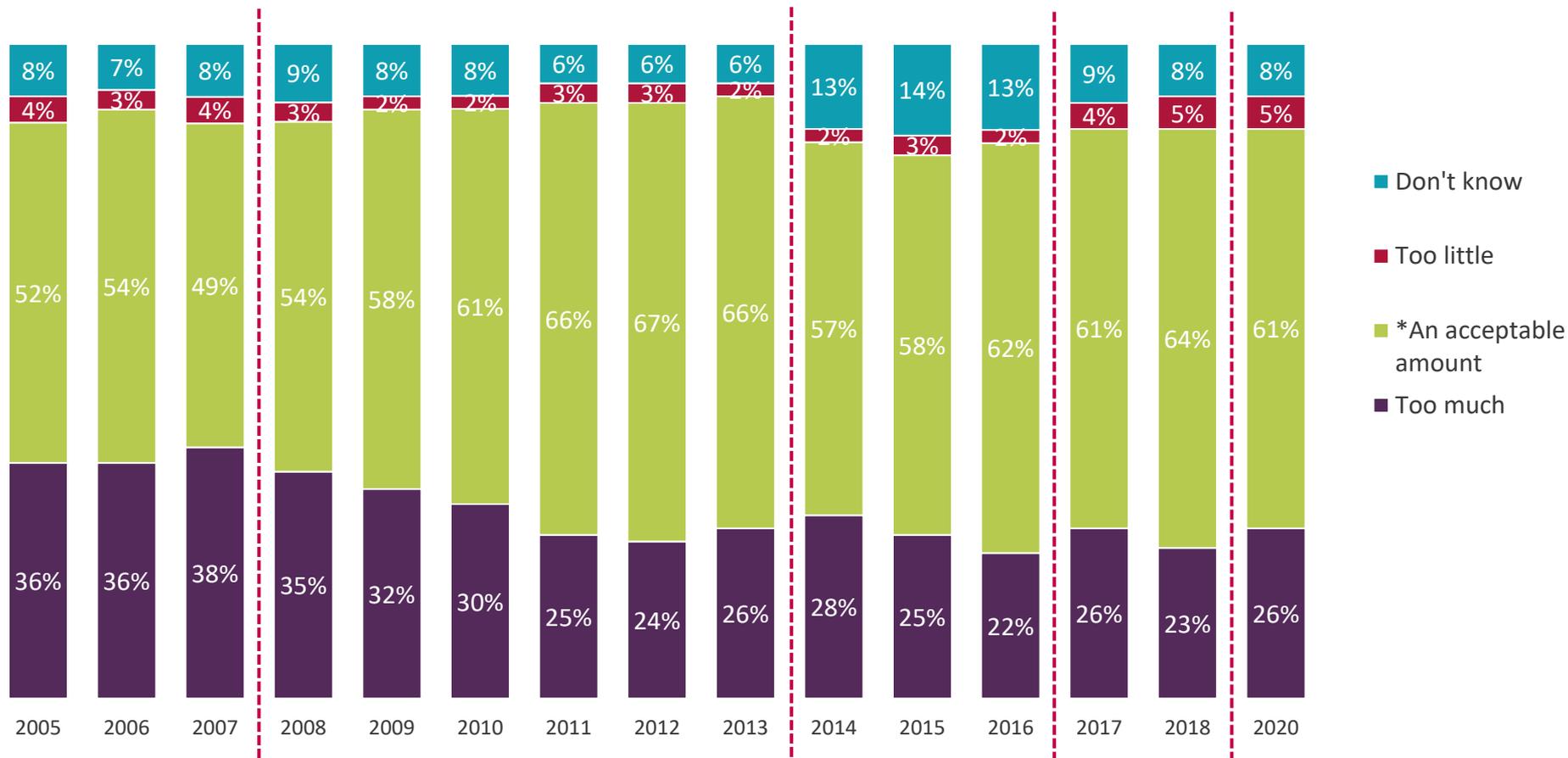
QF6C – Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television? Swearing?

Base: All with any TV sets (as indicated on chart). Prompted, single code. Significance testing shows any difference between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2020

Source: Cross Platform Media Tracker 2020

The proportion who think that there is 'too much' sex on TV has been fairly consistent since 2011

Opinion on the amount of sex on TV: historical view



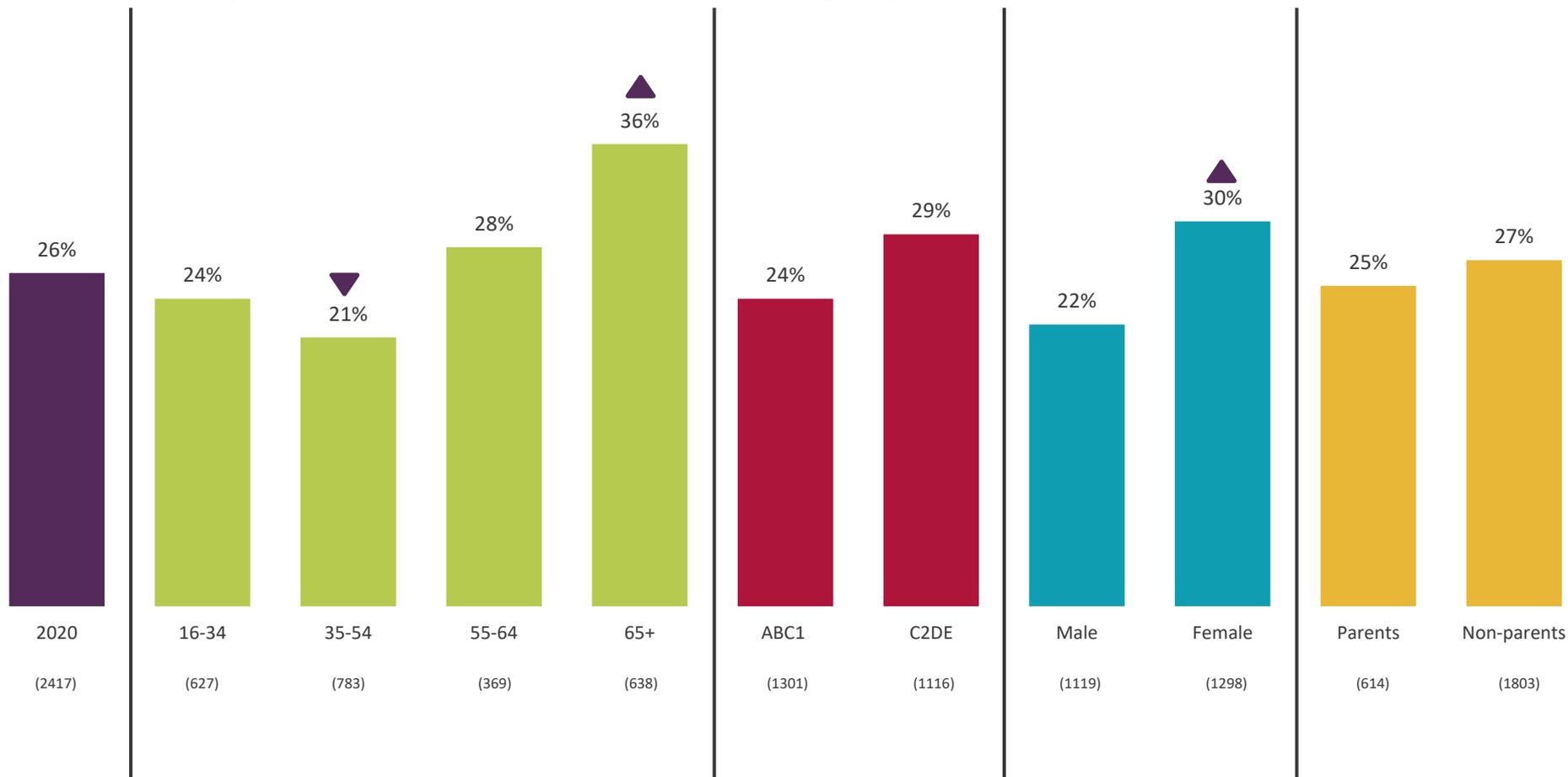
QF6A – Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television? Sex?

Base: All with any TV sets in 2020 (2417). Prompted, single code. Significance testing shows any difference between 2018 and 2020. Base pre-2014: All with TV, but excluding those never watching. *Pre-2014 'About the right amount'

Source: Cross Platform Media Tracker 2020

Those in the 65+ age group are most likely to think that there is 'too much' sex on TV, whilst women are more likely than men to think so

Overall % stating there is too much sex on TV: 2020 sub-groups



QF6A – Do you think, in general, that there is too much, too little or an acceptable amount of each of the following on television? Sex?

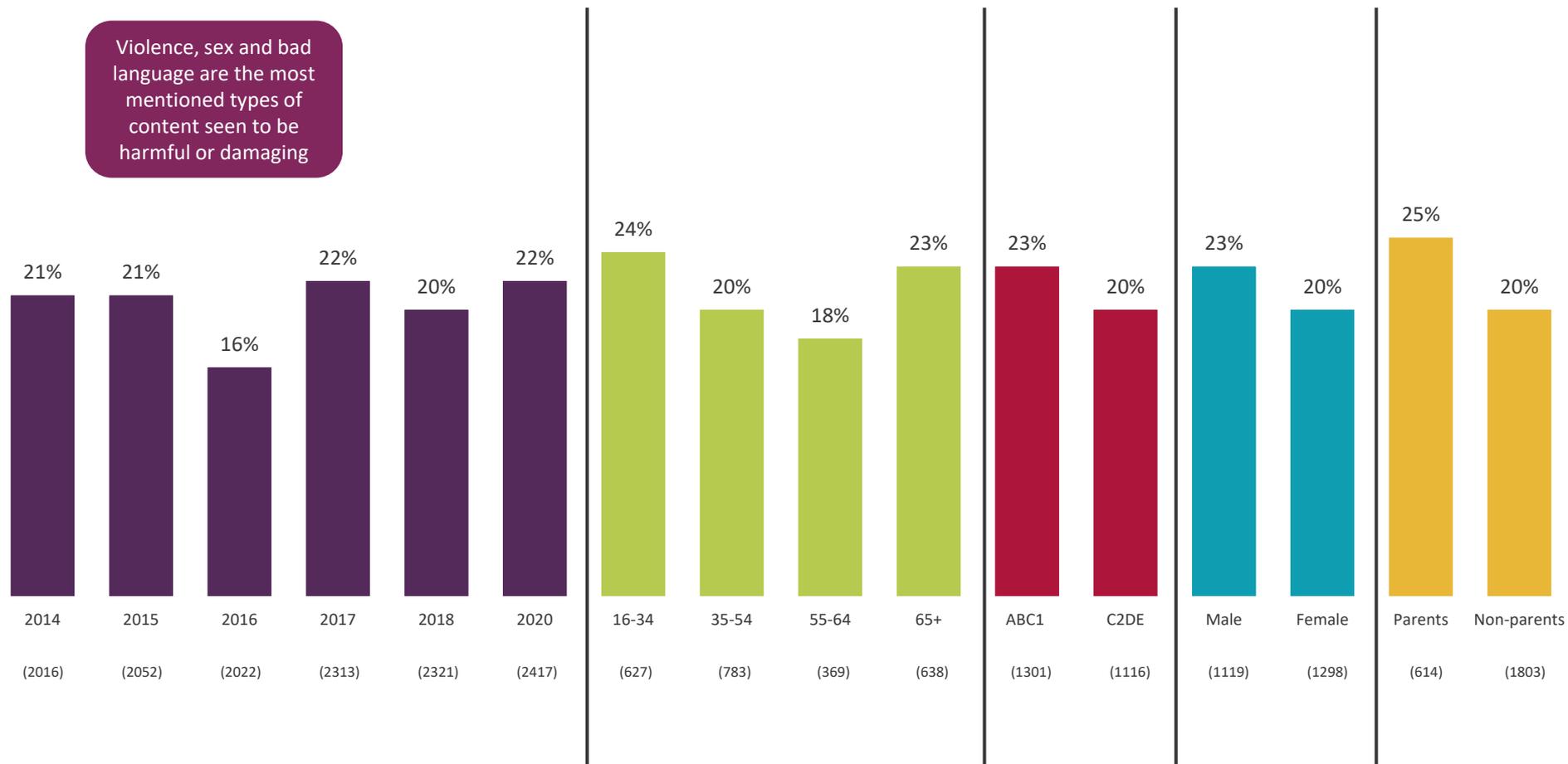
Base: All with any TV sets (as indicated on chart). Prompted, single code. Significance testing shows any difference between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2020

Source: Cross Platform Media Tracker 2020

Those having seen something harmful or damaging on TV is broadly consistent over time

Overall % who have seen something on TV they consider harmful or damaging

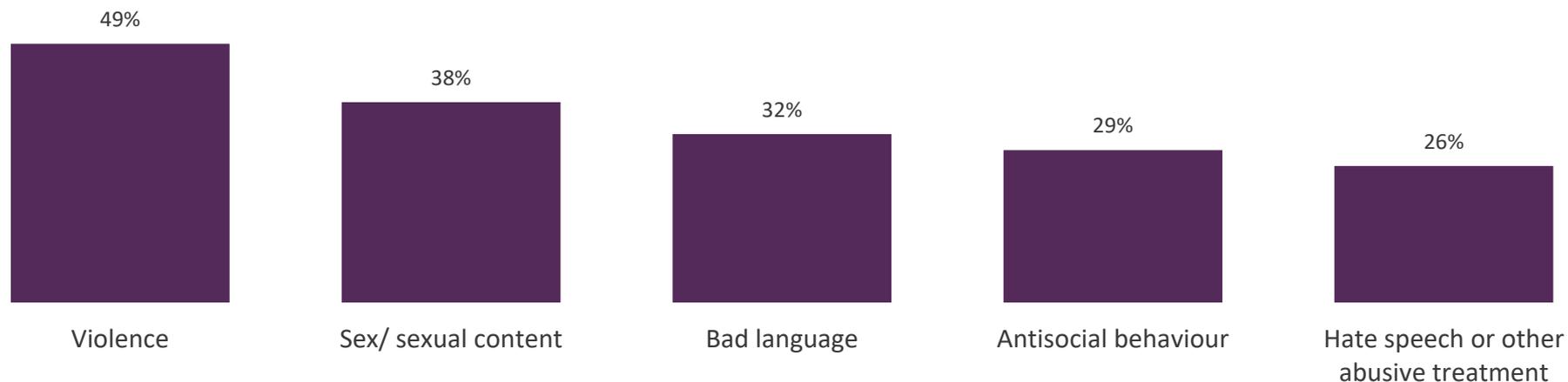
Violence, sex and bad language are the most mentioned types of content seen to be harmful or damaging



QF8 – Have you seen anything on TV in the last 12 months that you thought was harmful or damaging either to yourself, other adults or children?
 Base: All with any TV sets (as indicated on chart). Prompted, single code. Significance testing shows any difference between 2018 and 2020, between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2018
 Source: Cross Platform Media Tracker 2020

Almost half say violence on TV is what they had found harmful or damaging, with sex/ sexual content and bad language the next highest mentions

Type of content on TV considered to be harmful or damaging: 2020
(combined unprompted CAPI, CATI and prompted online data)



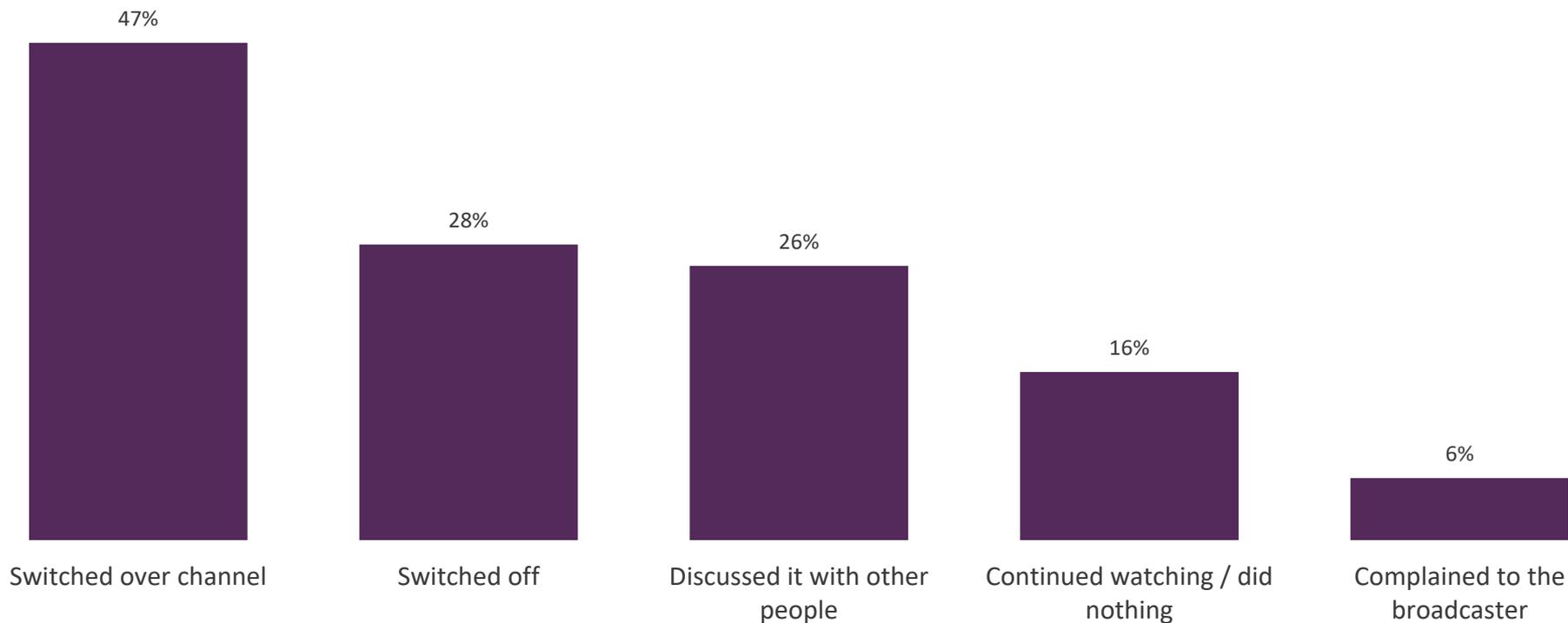
QF9 – Can you please tell me what you saw that you thought was harmful or damaging?

Base: All who said they'd seen something harmful or damaging in the last 12 months (22% of adults with any TV sets) (559). CAPI, CATI unprompted/online prompted, multicode. Top 5 reasons charted.

Source: Cross Platform Media Tracker 2020

Those who found something offensive are most likely to respond by switching over the channel

Reaction following offence by something on TV: 2020



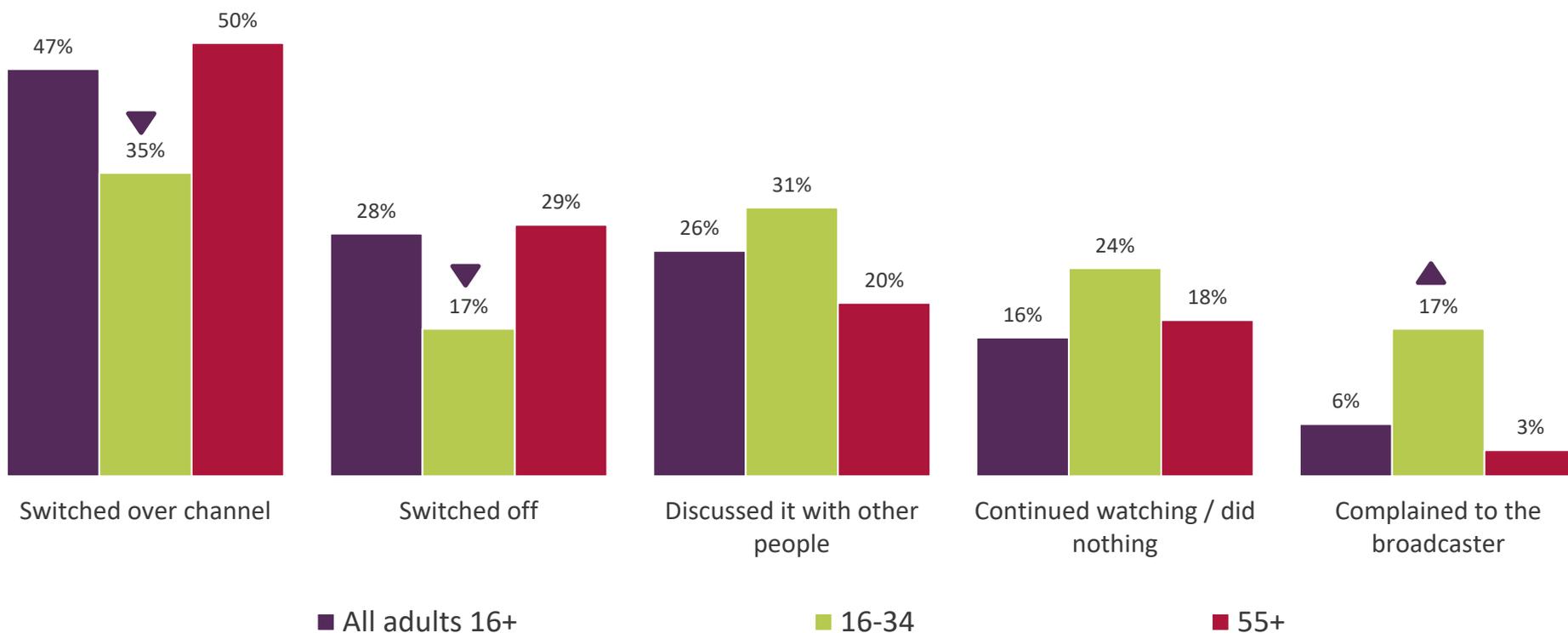
QF4 – How did you react when you were offended by what you saw on television? In other words, which, if any, of these things did you do?

Base: All who said they'd seen something offensive in the last 12 months (18% of adults with any TV sets) (482). Unprompted, multicode. Top reasons charted (over 5%)

Source: Cross Platform Media Tracker 2020

Younger age groups are less likely to switch over or switch off and more likely to complain to broadcasters in response to seeing something they consider offensive

Reaction following offence by something on TV: 2020 age groups



QF4 – How did you react when you were offended by what you saw on television? In other words, which, if any, of these things did you do?

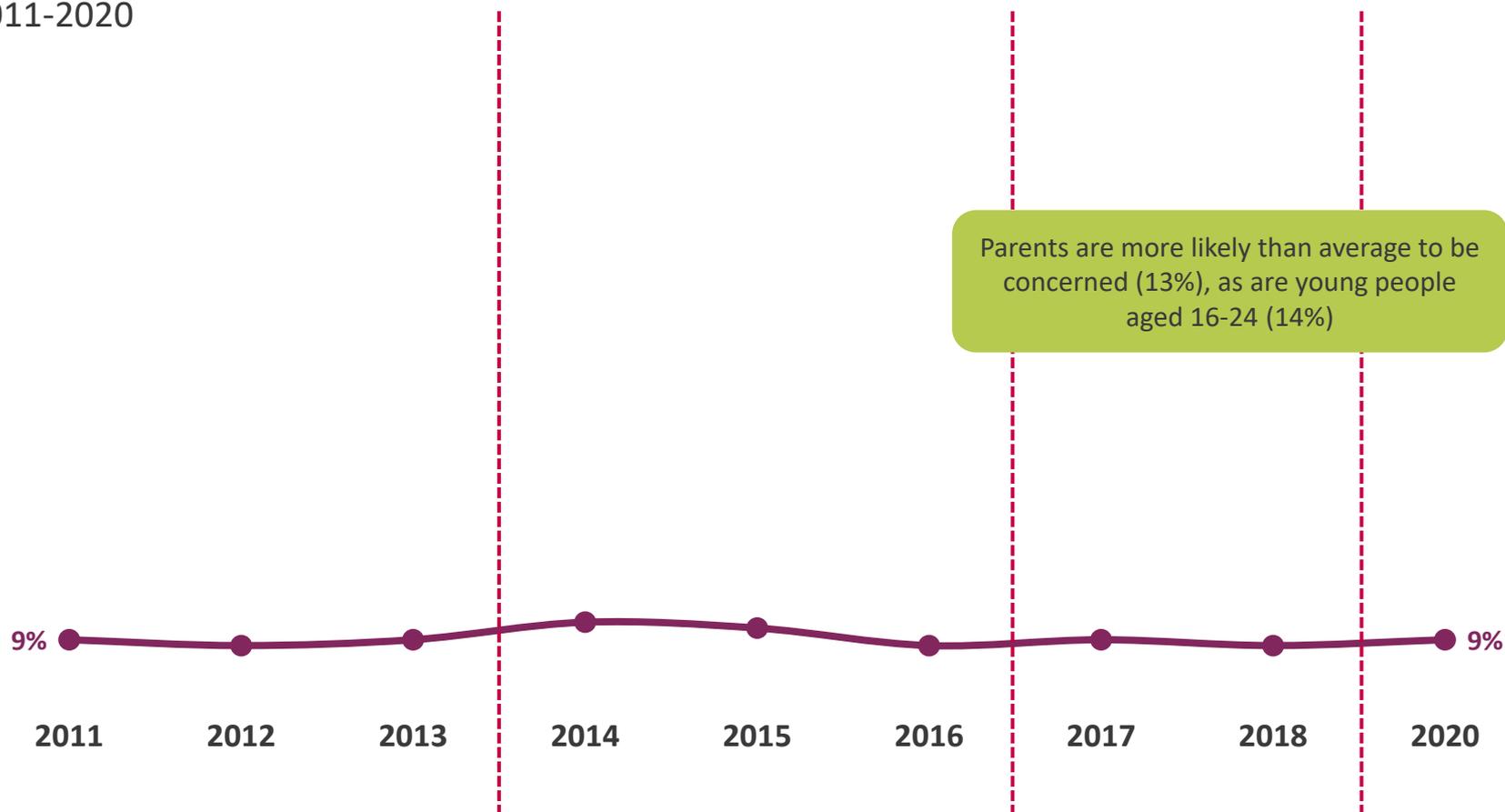
Base: All who said they'd seen something offensive in the last 12 months (18% of adults with any TV sets) (433); 16-34 (112); 55+ (249). Unprompted, multicode.

Top reasons charted. Significance testing shows any difference between either age group and all adults.

Source: Cross Platform Media Tracker 2020

The incidence of adults who have seen anything on TV where they were concerned about the welfare of children taking part is consistent over time

Overall % who have felt concerned for the welfare of children taking part in TV programmes in the last 12 months: 2011-2020



QF12 – In the last 12 months, have you seen anything on television where you were concerned about the welfare of children or young people taking part in the programme?

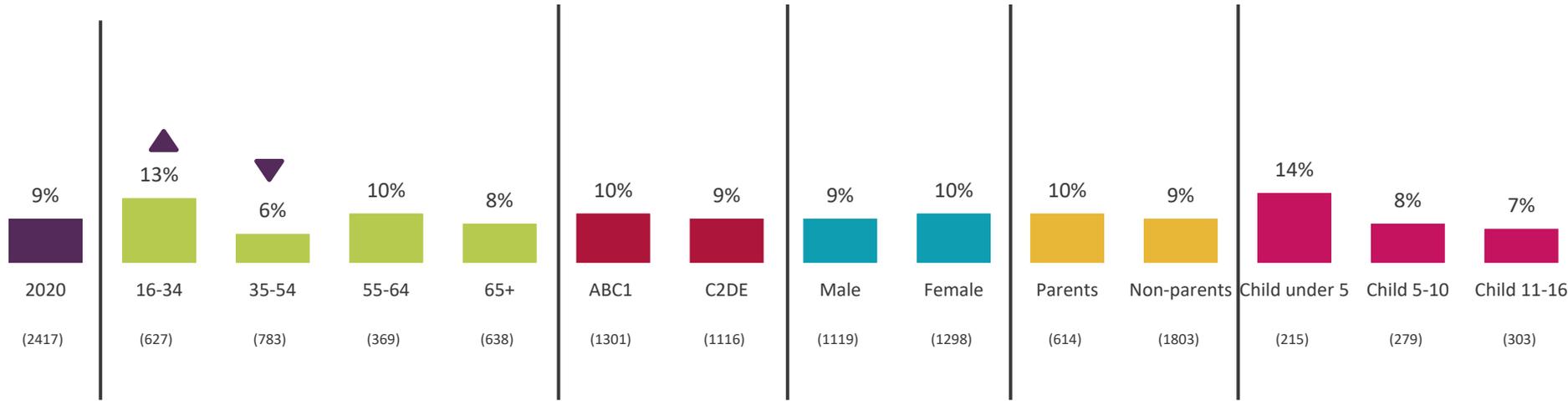
Base: All with any TV sets in 2011 (1723), 2012 (1830), 2013 (1838), 2014 (2016), 2015 (2052) and 2016 (2022), 2017 (2313), 2018 (2321), 2020 (2417). Prompted, single code. Significance testing shows any difference between 2017 and 2018. Dashed line to show where survey method changed.

Source: Cross Platform Media Tracker 2020

16-34 year olds are more likely to have seen anything on TV where they were concerned about the welfare of adults taking



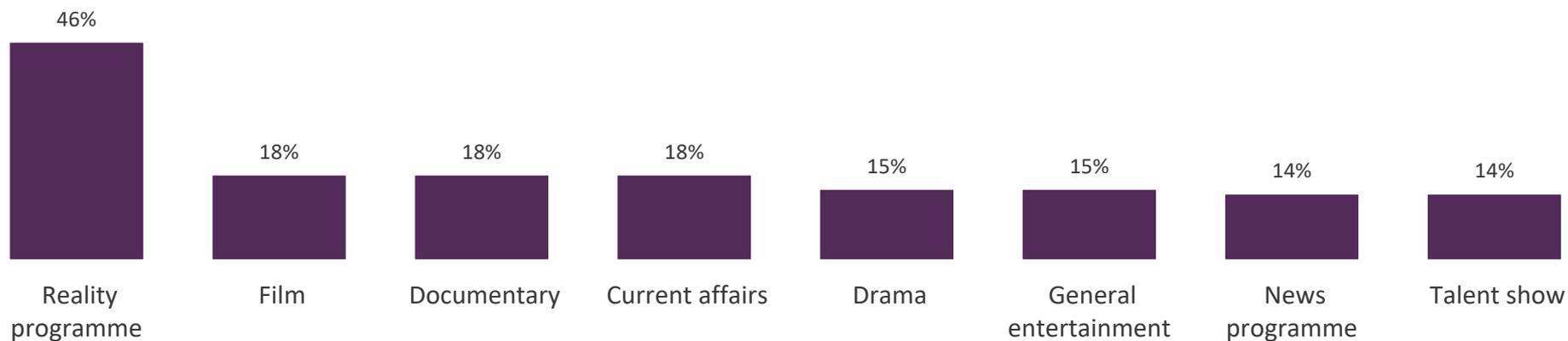
Overall % who have felt concerned for the welfare of adults taking part in TV programmes in the last 12 months: 2020 sub-groups



QF12b – In the last 12 months, have you seen anything on television where you were concerned about the welfare of adults taking part in the programme?
 Base: All with any TV sets (as indicated on chart). Prompted, single code. Significance testing shows any difference between any age group and all adults in 2020, between socio-economic groups, by gender, between parents and non-parents, between parents of any age group and all adults in 2020
 Source: Cross Platform Media Tracker 2020

The types of programmes where this content was seen is dominated by reality programmes

Programme which caused concern for the welfare of adults taking part in TV programmes in the last 12 months: 2020



QF13b – Thinking about the programmes that you were watching at the time, looking at this list, can you say what type of programme or show it was?

Base: All who said they'd seen anything on TV and were concerned about the welfare of adults taking part – 2020 (241). Prompted, multicode. Top reasons charted.

Source: Cross Platform Media Tracker 2020

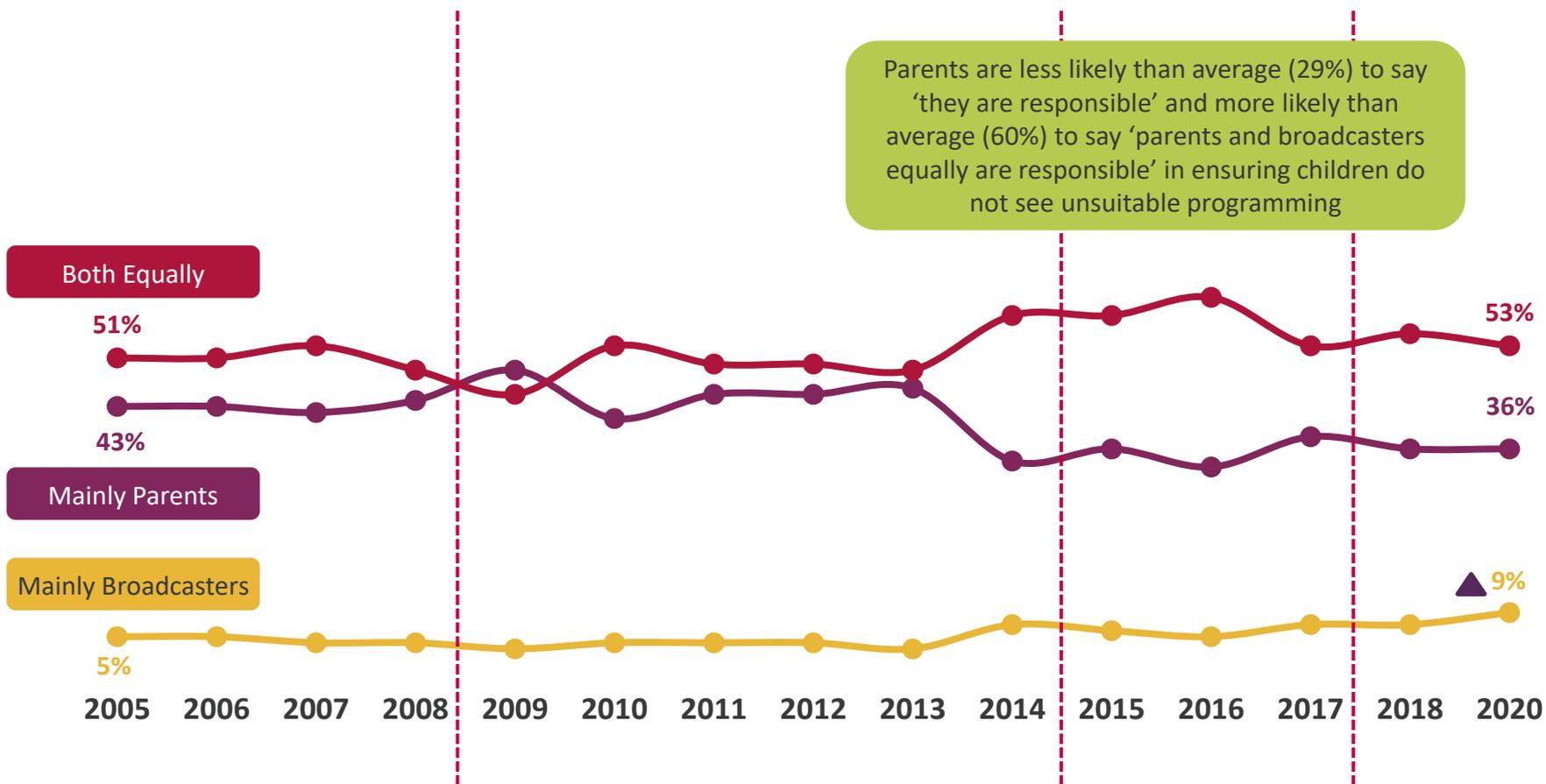
Awareness and understanding of TV/radio regulation

Awareness and understanding of TV/radio regulation: Summary of key findings

- Views on responsibility for children's viewing is largely consistent with 2018, with the majority considering parents and broadcasters to be equally responsible (53%).
- The majority (88%) of adults are aware of the watershed – although this is showing signs of erosion over time (measuring 94% in 2005). The decline is largely driven by a reduction in awareness among the younger age groups (79% awareness in 2020 vs. 88% awareness in 2014)
- A majority (57%) consider 9pm to be the right time for the watershed, although a fifth (21%) think it should be later.
- Four in five adults (80%) are aware that television is regulated, and a majority (69%) think that it regulated to protect young people from inappropriate content. Again, there are signs of slight erosion over time – with younger adults aged 16-34 having the lowest levels of awareness of regulation (70%)
- Awareness of radio regulation is lower, at 55%. It is also showing signs of erosion – down from 63% in 2014.
- Over one third of those aware of TV regulation (36%) correctly identify Ofcom as responsible for TV programme regulation, with a quarter (23%) saying they don't know.
- The large majority of UK adults (60%) feel that levels of regulation in broadcast TV are about right. However those who have seen something on TV that they consider offensive are more likely to think that current levels of regulation are 'too little'.

Views on responsibility for children’s viewing is largely consistent with 2018, with the majority considering parents and broadcasters to be equally responsible (53%). Around one third (36%) think parents are mainly responsible

Opinion on whose responsibility it is to ensure children do not see unsuitable programming: historical view



QE1 – Do you think it is mainly the responsibility of the parents, the broadcasters, or both equally, to make sure that children don't see unsuitable programmes?
 Base: All with any TV sets (2417). Prompted, single code. Significance testing shows any difference between 2018 and 2020. Base pre-2014: All respondents. Dashed line to show where survey method changed.
 Source: Cross Platform Media Tracker 2020

Younger adults are more likely to feel broadcasters should mainly take responsibility for children's viewing

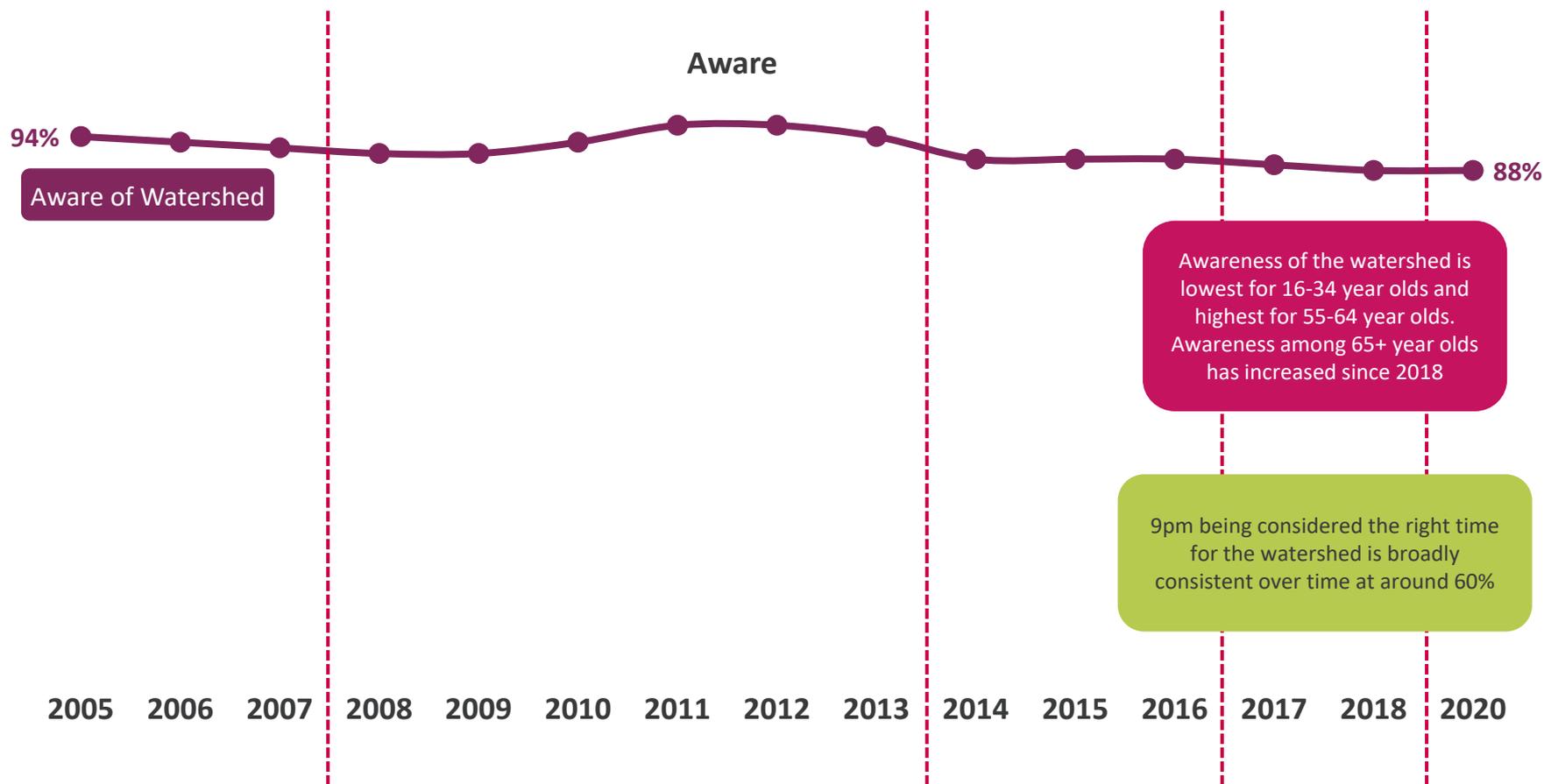
Opinion on whose responsibility it is to ensure children do not see unsuitable programming: 2020 sub-groups



QE1 – Do you think it is mainly the responsibility of the parents, the broadcasters, or both equally, to make sure that children don't see unsuitable programmes?
 Base: All with any TV sets in 2020 (2417); aged 16-34 (627); 35-54 (783); 55-64 (369); 65+ (638); ABC1 (1301); C2DE (1116); Male (1119); Female (1298); Parents (614); Non-parents (1803); Parents of child aged under 5 (215); aged 5-10 (279); aged 11-16 (303). Prompted, single code. Significance testing shows any difference between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2020, between parents of any age group and all adults in 2020
 Source: Cross Platform Media Tracker 2020

Most adults are aware of the watershed, with signs of erosion over time

Watershed awareness

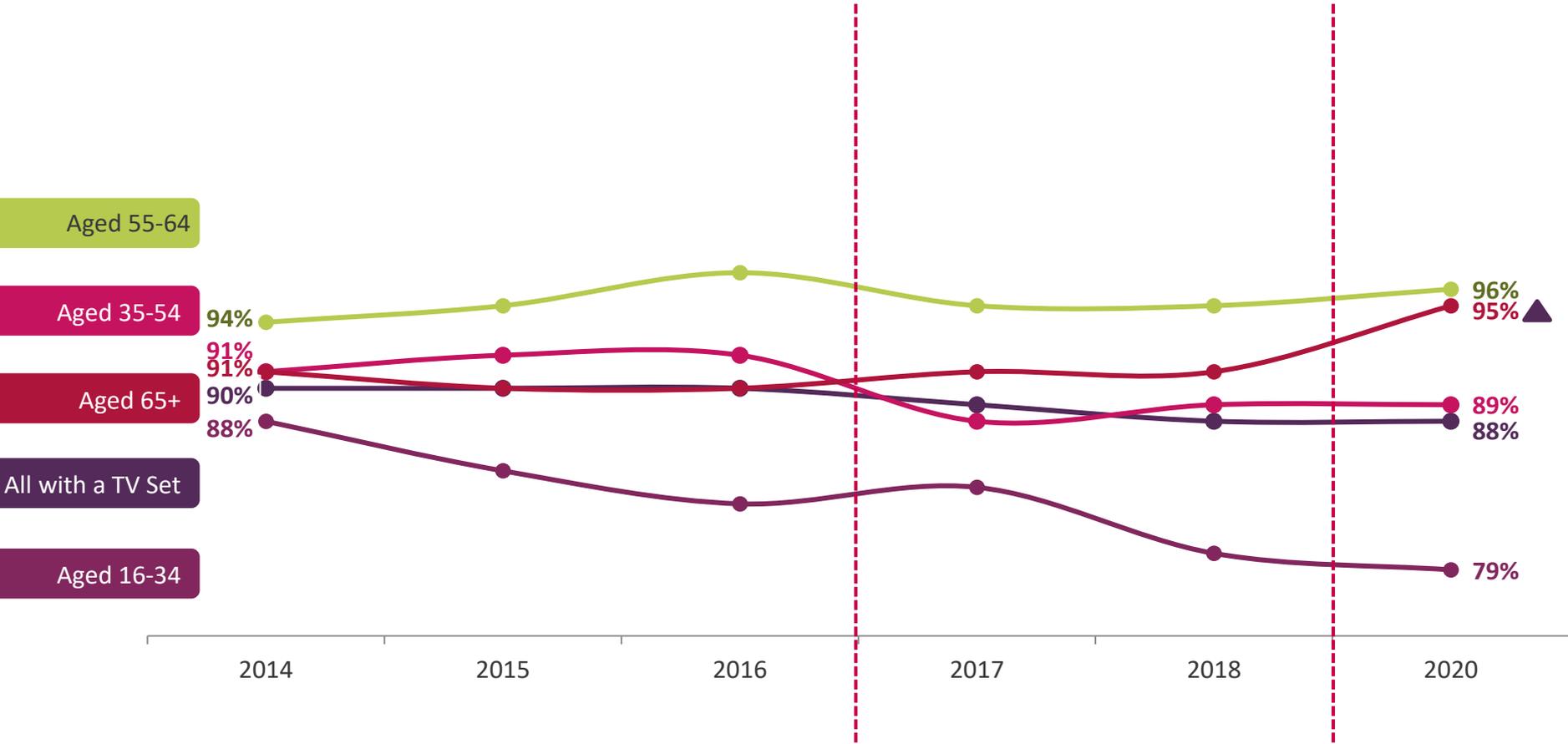


Intro to question: Broadcasters are required to only show television programmes which are not suitable for children only after a certain time in the evening.
QE2 – Before today, were you aware of this?
Base: All with any TV sets (2417). Prompted, single code. Significance testing shows any difference between 2018 and 2020. Base pre-2014: All with TV, but excluding those never watching. Dashed line to show where survey method changed.
Source: Cross Platform Media Tracker 2020

Awareness of the watershed continues to decline among 16-34 year olds



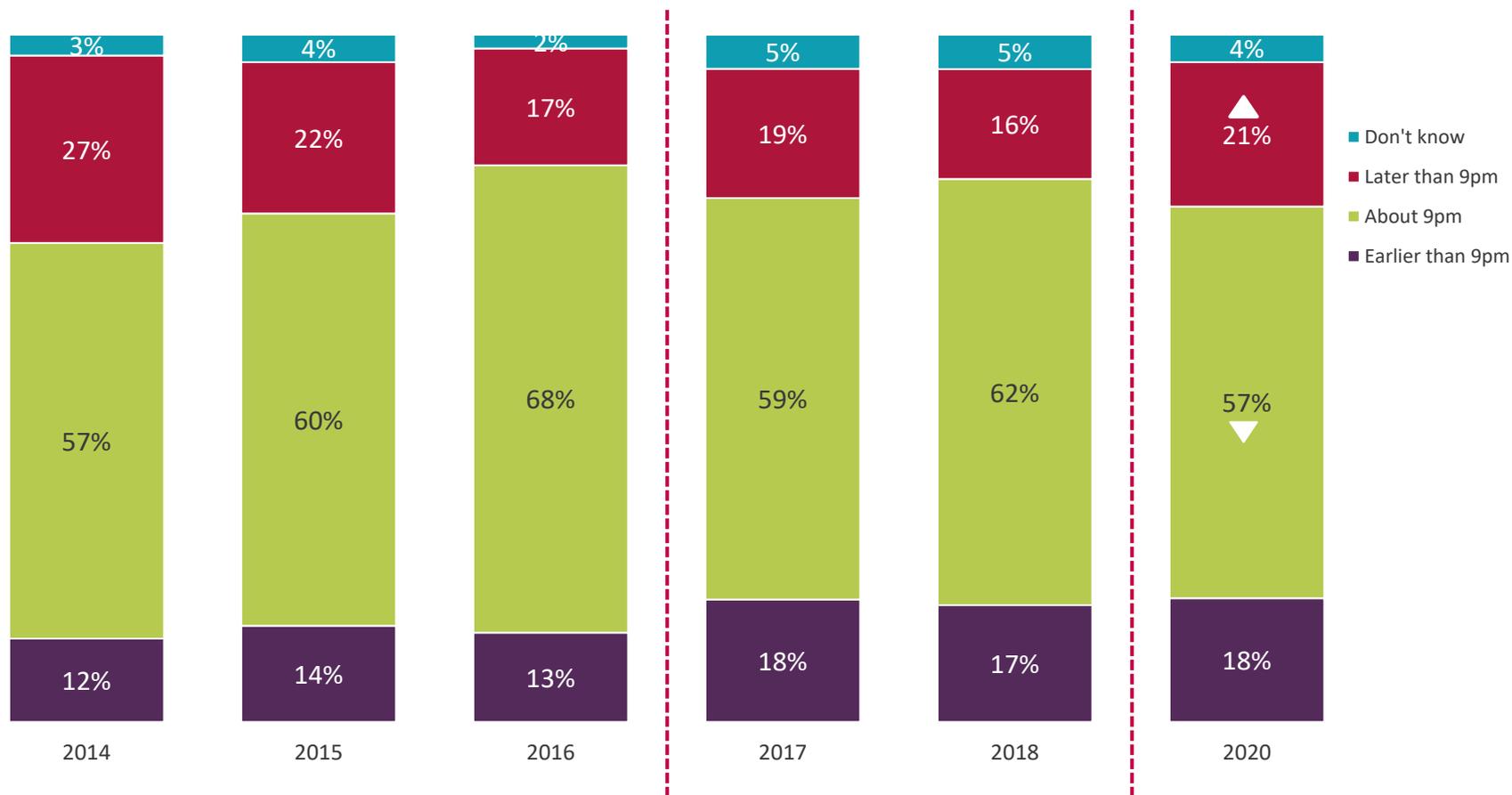
Watershed awareness: 2014-2020, by age



Intro to question: Broadcasters are required to only show television programmes which are not suitable for children only after a certain time in the evening.
 QE2 – Before today, were you aware of this?
 Base: All with any TV sets (2417), Aged 16-34 (627), Aged 35-54 (783), 55-64 (369), 65+ (638). Prompted, single code. Significance testing shows any difference between 2018 and 2020. Dashed line to show where survey method changed.
 Source: Cross Platform Media Tracker 2020

A majority (57%) consider 9pm to be the right time for the watershed, although a fifth (21%) think it should be later

Opinion on when TV channels should be allowed to broadcast programmes not suitable for children: 2014-2020



QE4 – Programmes that are unsuitable for children may only be shown on TV channels after 9pm – usually known as the 9 o’clock watershed. Which of these best describes when TV channels should be allowed to start broadcasting programmes that contain adult themes and may not be suitable for children?

Base: All with any TV sets in 2014 (2016); 2015 (2052); 2016 (222), 2017(2313), 2018 (2321), 2020 (2417) Prompted, single code. Significance testing shows any difference between 2017 and 2018. Dashed line to show where survey method changed.

Older adults and the C2DE group are more likely to think the watershed should be later than 9pm



Opinion on when TV channels should be allowed to broadcast programmes not suitable for children: 2020 sub-groups

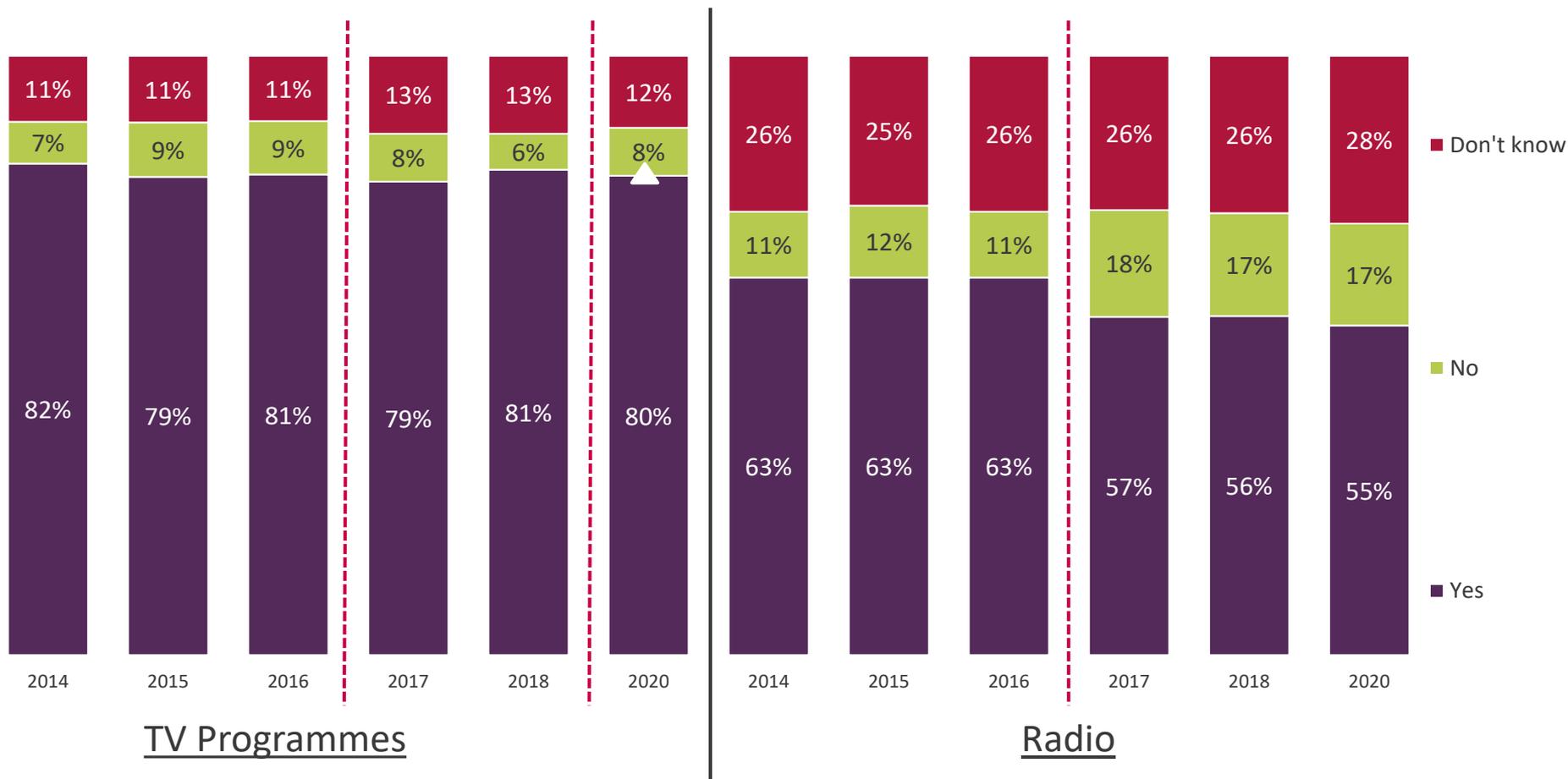


QE4 – Programmes that are unsuitable for children may only be shown on TV channels after 9pm – usually known as the 9 o’clock watershed. Which of these best describes when TV channels should be allowed to start broadcasting programmes that contain adult themes and may not be suitable for children?

Base: All with any TV sets (as indicated on chart). Prompted, single code. Significance testing shows any difference between any age group and all adults in 2020, between socio-economic groups, by gender, between parents and non-parents, between parents of any age group and all adults in 2020

Four in five adults say they are aware of TV regulation. Levels of awareness of radio regulation are lower

Awareness of whether regulation currently exists (2014 - 2020)



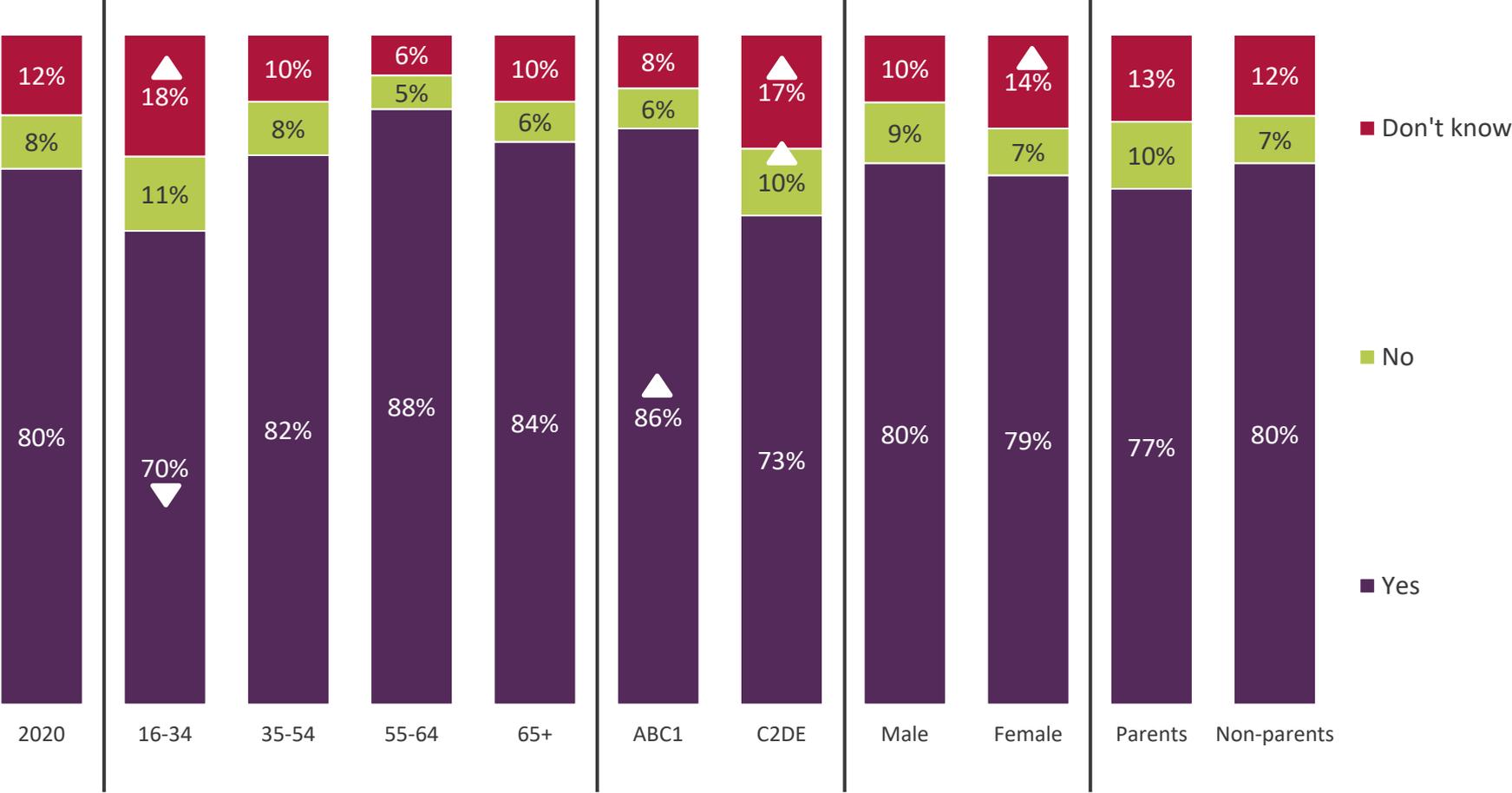
QD1/QI1 – As far as you know, are TV programmes regulated? As far as you know, is the radio regulated in terms of what can be broadcast? (When needed note was used to define – “By regulation I mean rules or guidelines about what can and can’t be shown/ broadcast”)

Base: All respondents 2014 (2074); 2015 (2107); 2016 (2069), 2017 (2386), 2018 (2384), 2020 (2474). Prompted, single code. Significance testing shows any difference between 2017 and 2018. Dashed line to show where survey method changed.

The 16-34 age group is the least likely to be aware that TV programme regulation exists



Awareness of whether TV programme regulation currently exists: 2020 sub-groups



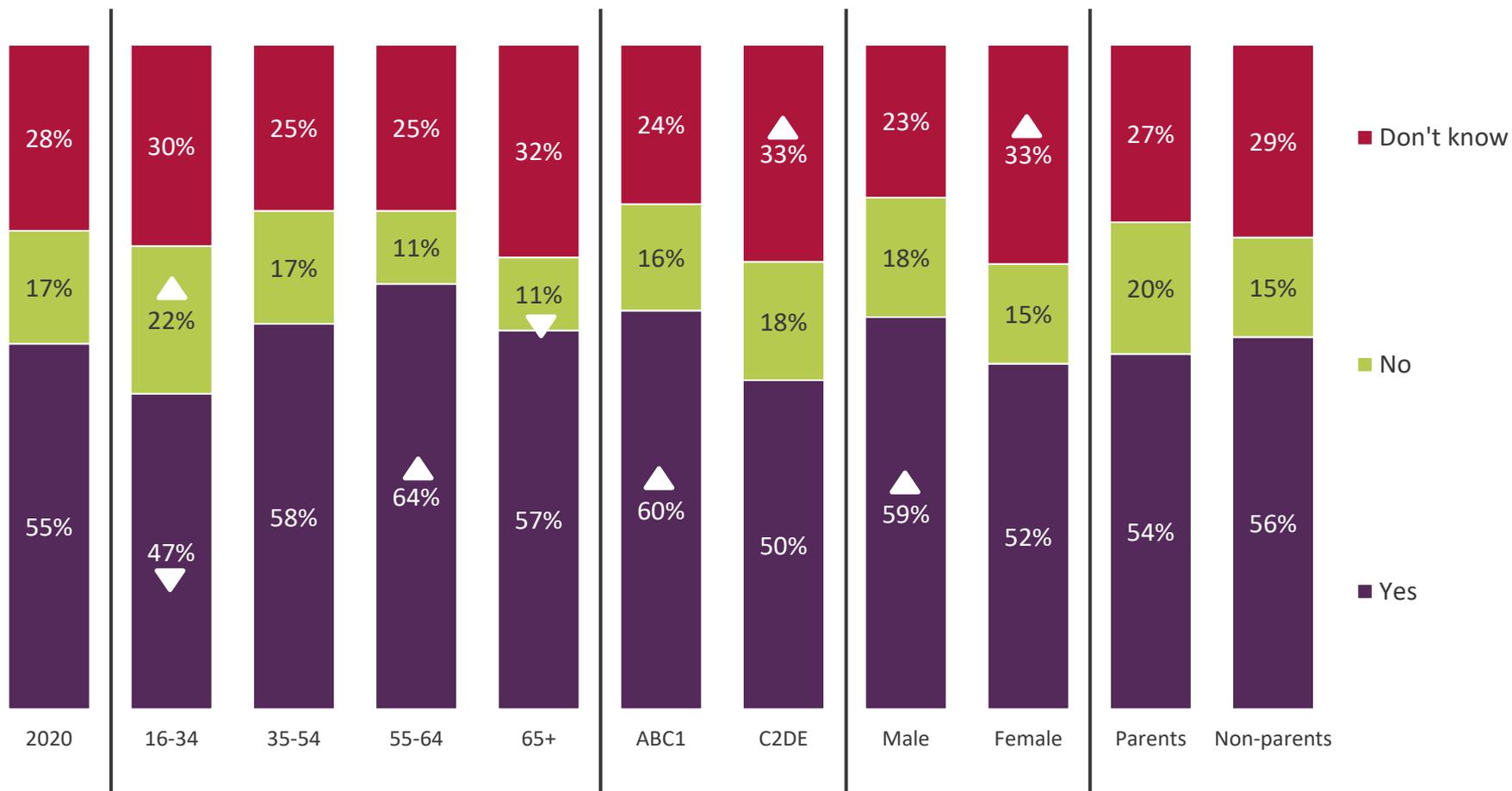
QD1 – As far as you know, are TV programmes regulated?

Base: All respondents in 2020 (2474); aged 16-34 (661); 35-54 (796); 55-64 (375); 65+ (642); ABC1 (1329); C2DE (1145); Male (1143); Female (1331); Parents (618); Non-parents (1856). Prompted, single code. Significance testing shows any difference between any age group and all adults in 2018, between socio-economic groups, by gender and between parents and non-parents in 2020

Source: Cross Platform Media Tracker 2020

Those in ABC1 social grades are more likely to be aware that radio regulation currently exists compared to those in C2DE social grades

Awareness of whether radio regulation currently exists: 2020 sub-groups



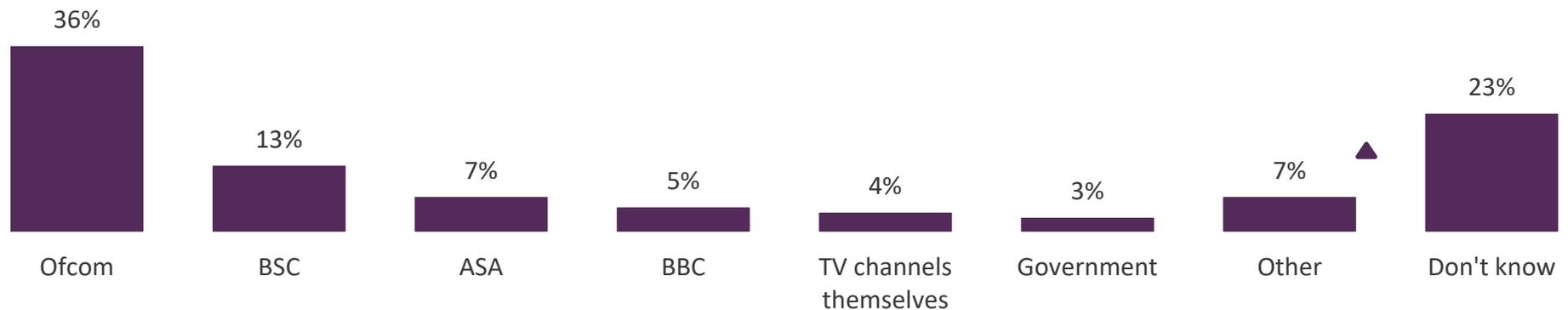
Q11 – As far as you know, is the radio regulated in terms of what can be broadcast?

Base: All respondents in 2020 (2474); aged 16-34 (661); 35-54 (796); 55-64 (375); 65+ (642); ABC1 (1329); C2DE (1145); Male (1143); Female (1331); Parents (618); Non-parents (1856). Prompted, single code. Significance testing shows any difference between any age group and all adults in 2018, between socio-economic groups, by gender and between parents and non-parents in 2020

Source: Cross Platform Media Tracker 2020

Over one third correctly identify Ofcom as responsible for TV programme regulation, with one quarter saying they don't know

Opinion on who regulates TV programmes: 2020



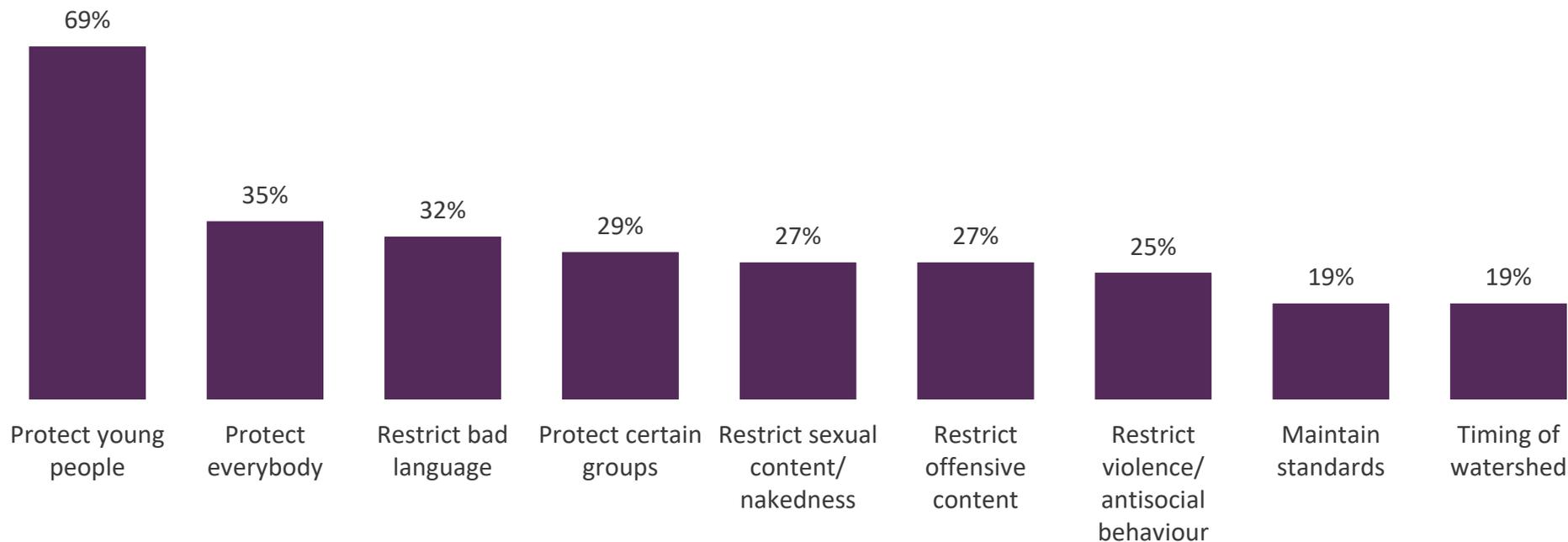
QD2 – Who do you think is responsible for regulating TV programmes?

Base: All respondents aware of TV programme regulation 2014 (1485); 2015 (1656); 2016 (1670); 2017 (1915), 2018 (1960), 2020 (2000). CAPI, CATI unprompted/online prompted, first mention, single code. Significance testing shows any difference between 2018 and 2020. Survey method changed between 2016 and 2017.

Source: Cross Platform Media Tracker 2020

The majority of people think that TV channels are regulated in order to protect young people from exposure to inappropriate content

Unprompted opinion on why TV programme regulation exists



QD4A/QD4B – TV programmes on all channels are supposed to follow rules or guidelines about what can and can't be shown. Why do you think there are these rules or guidelines?

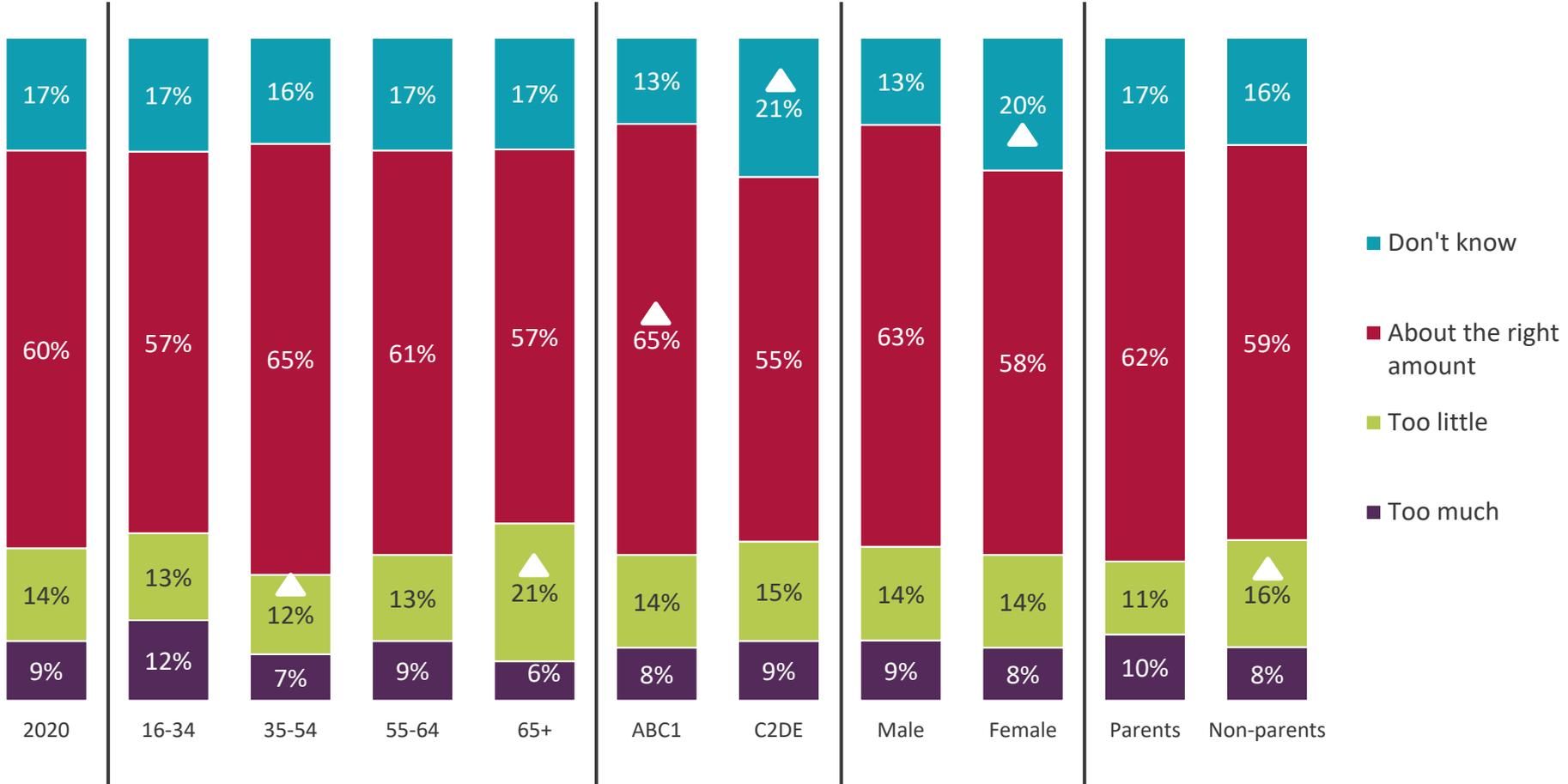
Base: All respondents in 2014 (2074); 2015 (2107); 2016 (2069); 2017 CAPI only (1100), 2018 CAPI only (1134), 2020 CAPI only (156) . Unprompted, total mentions, multicode. Significance testing shows any difference between 2018 and 2020. Survey method changed between 2016 and 2017.

Source: Cross Platform Media Tracker 2020

One in five of those aged 65+ think that there is 'too little' regulation of TV programmes as a whole.



Opinion on current levels of TV programme regulation: 2020 sub-groups

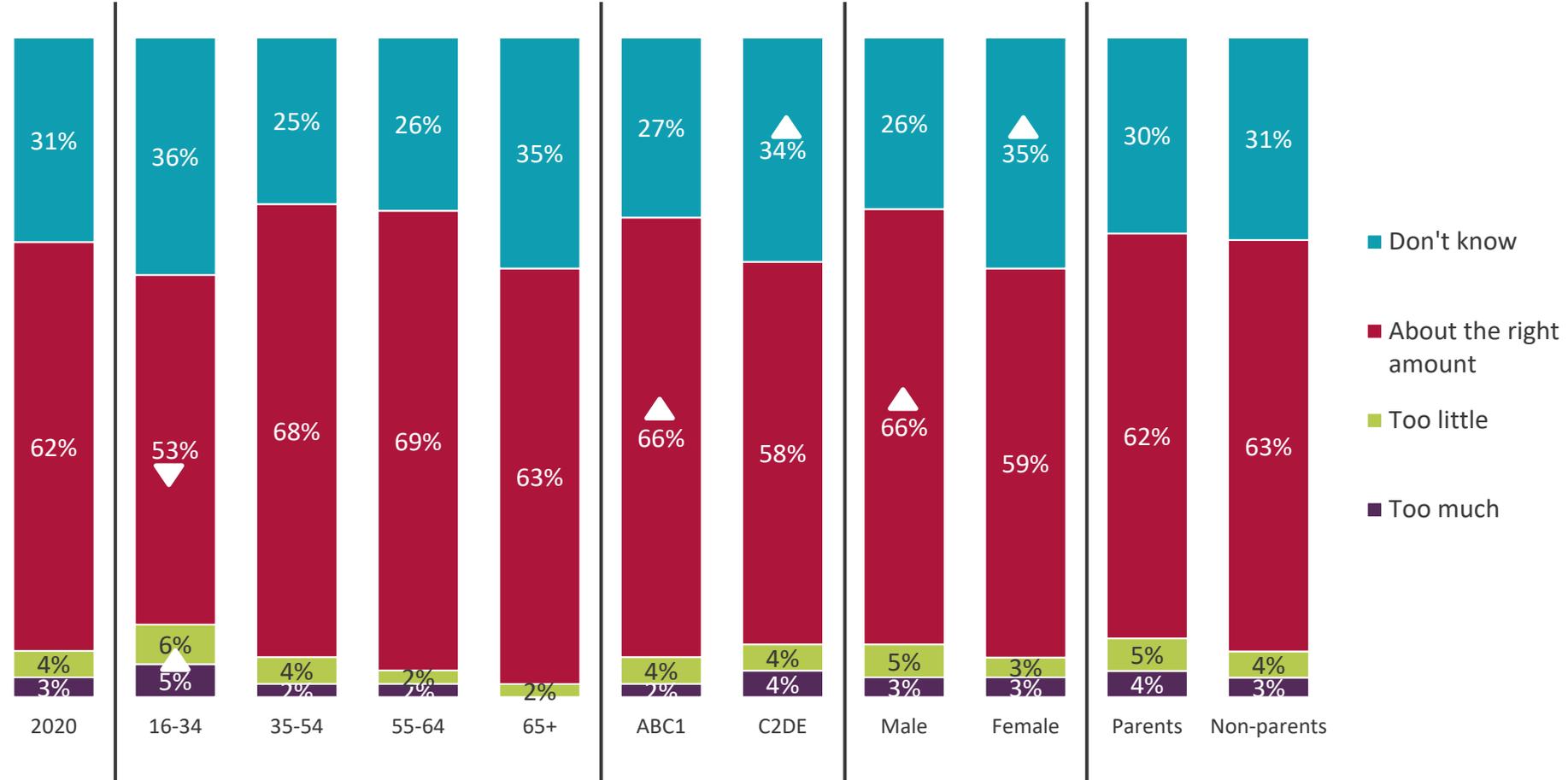


QD3A – Do you think the amount of regulation for TV programmes as a whole is too much, too little or about the right amount?
 Base: All respondents in 2020 (2474); aged 16-34 (661); 35-54 (796); 55-64 (375); 65+ (642); ABC1 (1329); C2DE (1145); Male (1143); Female (1331); Parents (618); Non-parents (1856). Prompted, single code. Significance testing shows any difference between any age group and all adults in 2018, between socio-economic groups, by gender and between parents and non-parents in 2020
 Source: Cross Platform Media Tracker 2020

16-34 year olds are least likely of all age groups to think there is about the right amount of regulation on the radio



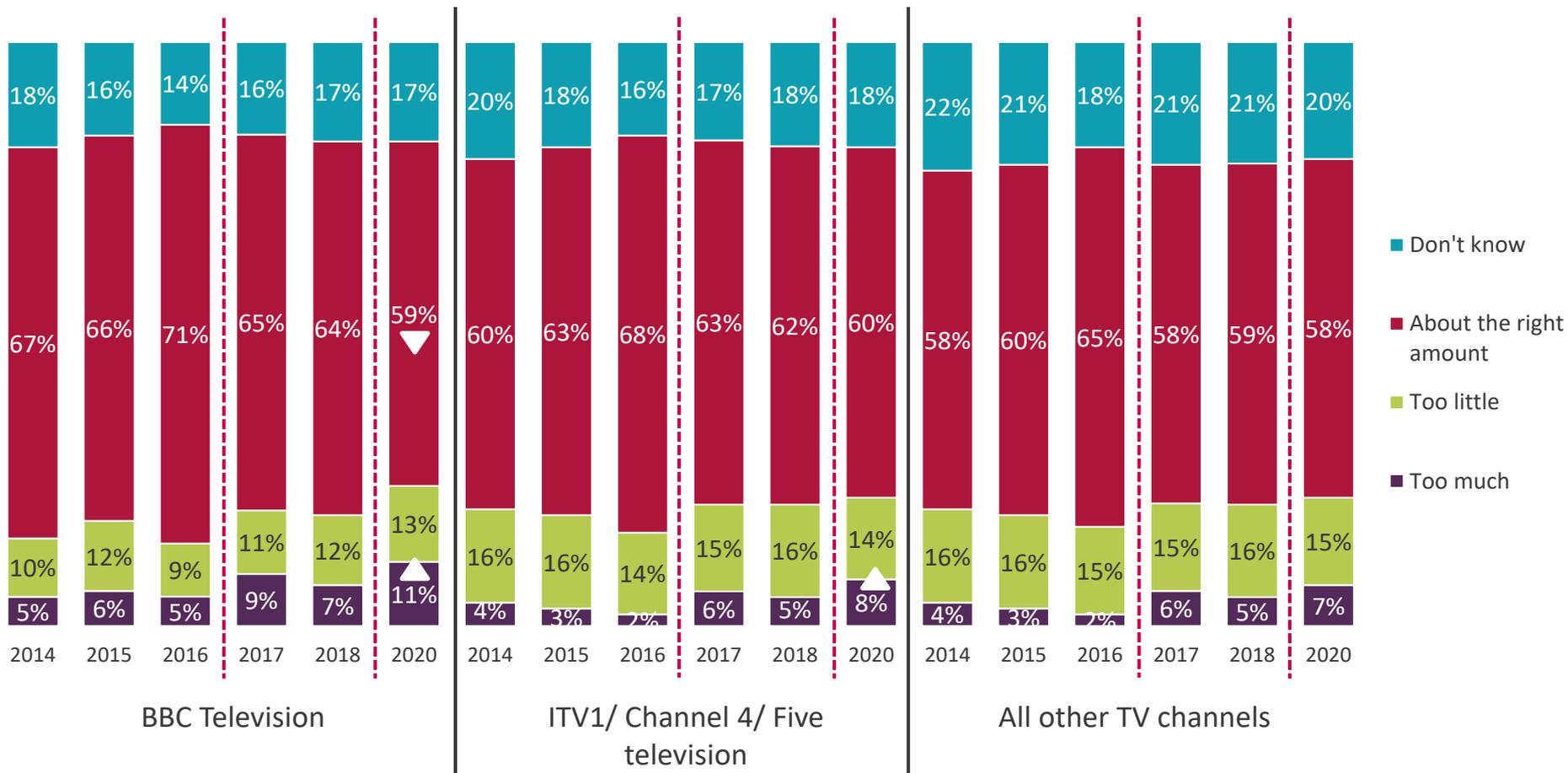
Opinion on current levels of Radio regulation: 2020 sub-groups



Q13 – Now thinking about radio as a whole, do you think the amount of regulation is too much, too little, or about the right amount?
 Base: All respondents in 2020 (2474); aged 16-34 (661); 35-54 (796); 55-64 (375); 65+ (642); ABC1 (1329); C2DE (1145); Male (1143); Female (1331); Parents (618); Non-parents (1856). Prompted, single code. Significance testing shows any difference between any age group and all adults in 2018, between socio-economic groups, by gender and between parents and non-parents in 2020
 Source: Cross Platform Media Tracker 2020

A majority consider the current levels of regulation 'about the right amount' for different TV channels.

Opinion on current levels of regulation: 2014-2020

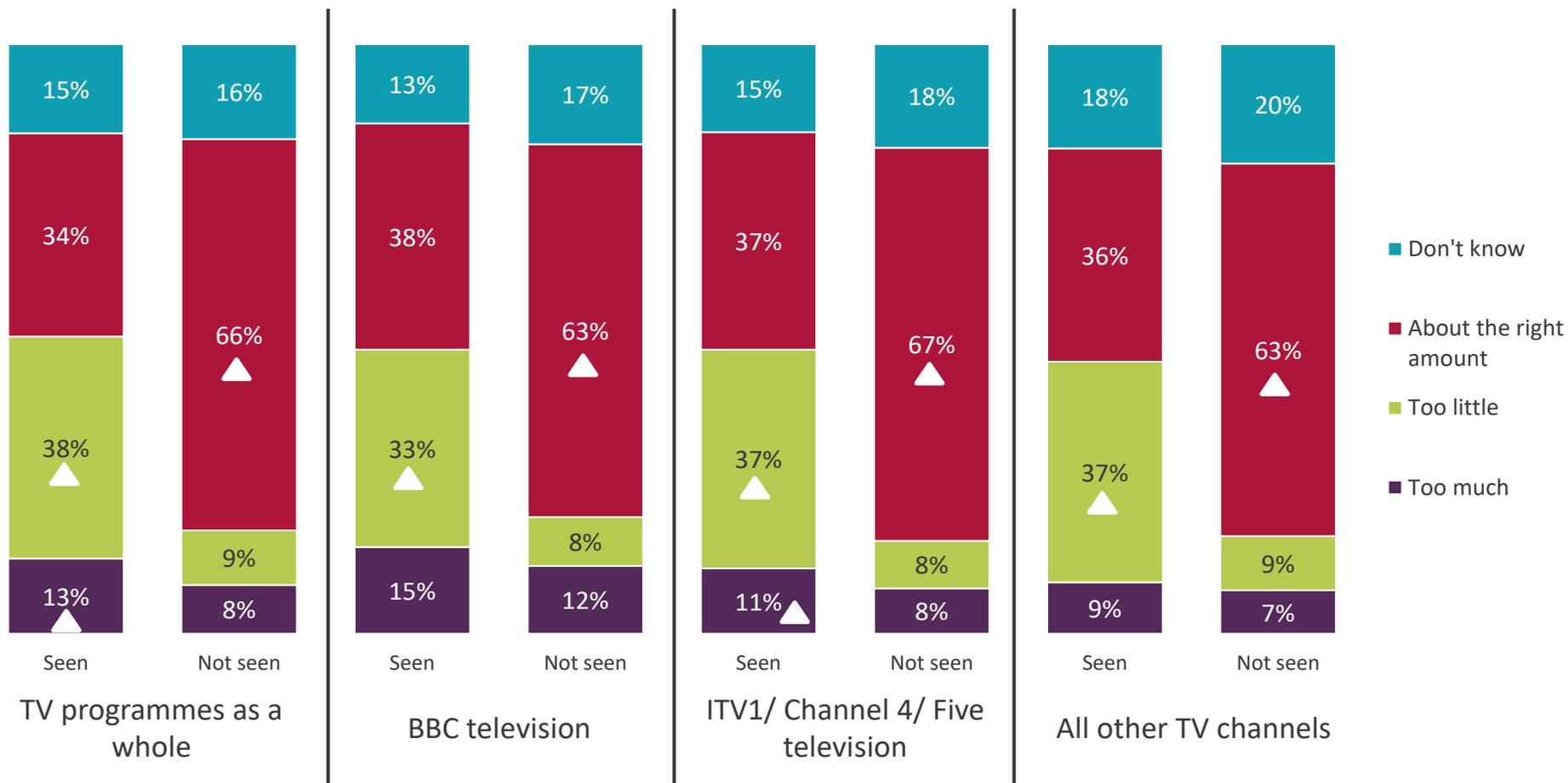


QD3B/C/D – Do you think the amount of regulation for [media type] is too much, too little, or about the right amount?

Base: All respondents 2014 (2074); 2015 (2107); 2016 (2069), 2017 (2386), 2018 (2384), 2020 (2474). Prompted, single code. Significance testing shows any difference between 2018 and 2020. Dashed line shows where survey method changed.

Those who have seen something on TV that they consider offensive are more likely to think that current levels of regulation are 'too little'

Opinion on current levels of regulation – by whether something offensive seen on TV in the last 12 months: 2018



QD3 – Do you think the amount of regulation for [media type] is too much, too little, or about the right amount?

Base: All with any TV sets who have seen something offensive (482); who have not seen something offensive (1761). Prompted, single code. Significance testing shows any difference between those who have and have not seen something offensive in the last 12 months.

Source: Cross Platform Media Tracker 2018

Attitudes towards TV/radio advertising, sponsorship, product placement and promotions

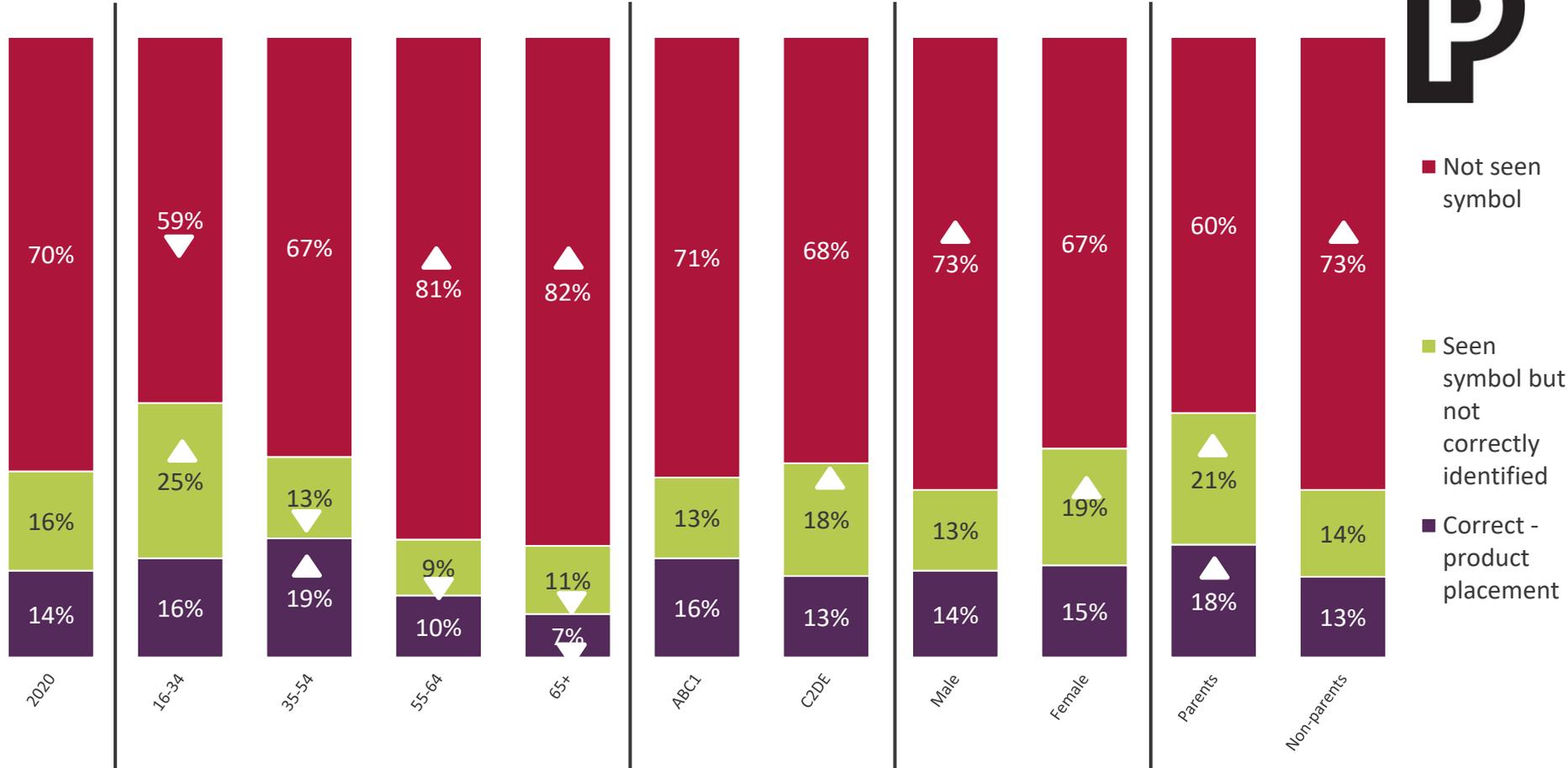
Attitudes towards TV/radio advertising, sponsorship, product placement and promotions: Summary of key findings

- Identification of the 'P' symbol is relatively low. Just under one third of UK (30%) adults recognise it, and only half of those correctly identify it as a product placement symbol
- General product placement awareness is increasing over time although still less than half (43%) of audiences are aware of this type of commercial activity
- Around one quarter of adults (24%) say they have concerns about advertising on television. The level of concern measured has however been reducing over time. Older people are more likely to be concerned than younger people.
- The frequency and length of advertising breaks are the top two spontaneous advertising concerns mentioned.
- On prompting with specific types of advertising, the top two mentioned are gambling and payday loans/credit advertising
- Views are mixed on attitudes towards the number of television advertising breaks in an hour. Around two-fifths of people think there are already more breaks than they are happy with. While just under four-in-ten think the current number of breaks doesn't bother them but they wouldn't want any more. Around one-in-ten would be willing to accept a small increase/increase in advertising breaks per hour.
- Views towards the amount of advertising minutes per hour mirror these findings.
- Attitudes towards commercial radio advertising among commercial radio listeners are slightly more relaxed. Only one quarter say there is already more commercial activity on radio than they are happy with. Around half say current levels don't bother them but they wouldn't want any more, whilst the remainder say they would be willing to accept a small increase/increase

Correct identification and awareness of the 'P' symbol is relatively low, particularly among older adults



Awareness of product placement symbol

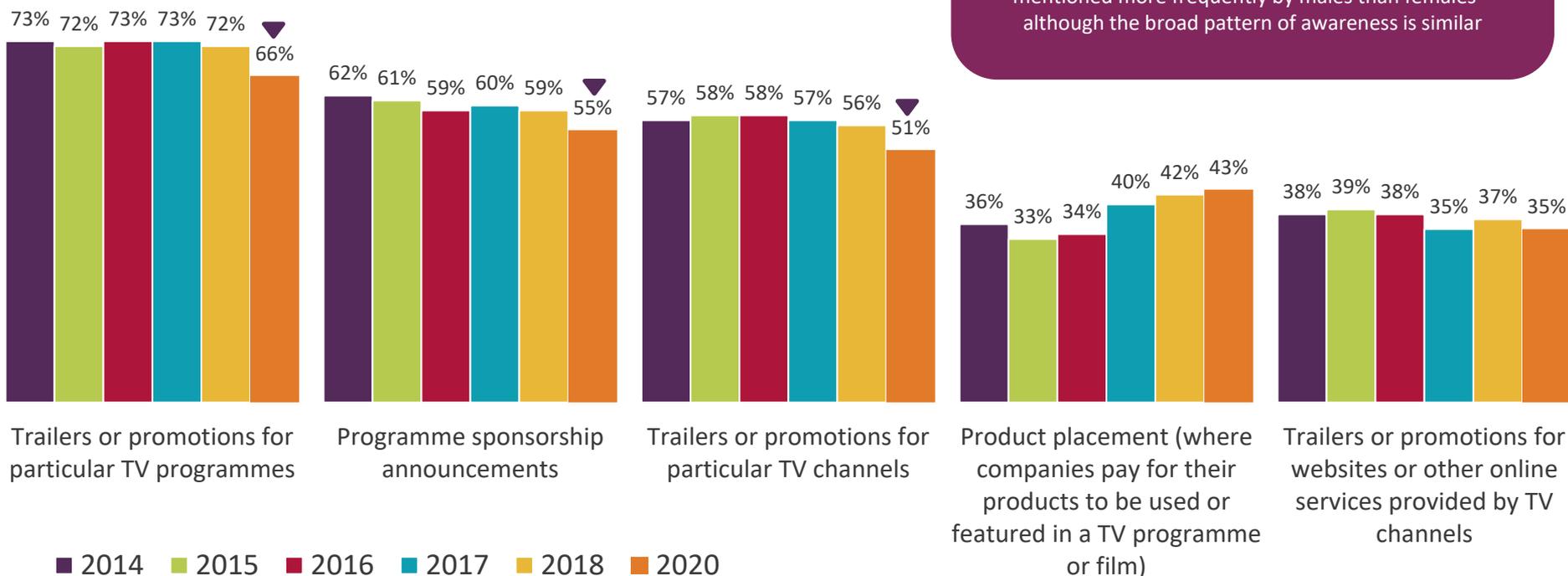


QC1/QC1a – Have you ever noticed this symbol featured at the beginning or end of a TV programme, or following an advertising break? IF YES – Do you know what this symbol is used for?
 Base: All with any TV sets in 2014 (2016); 2015 (2052); 2016 (2022), 2017 (2313), 2018 (2321), 2020 (2417); aged 16-34 (627); 35-54 (783); 55-64 (369); 65+ (638); ABC1 (1301); C2DE (1116); Male (1119); Female (1298); Parents (614); Non-parents (1803). Prompted, single code. Significance testing shows any difference between 2018 and 2020 and between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2018. Dashed line shows where survey method changed.
 Source: Cross Platform Media Tracker 2020

Two thirds of adults are aware of programme trailers, a decrease from previous years. Product placement awareness continues to edge upward, although still less than half of adults are aware of this commercial mechanism

Awareness of commercial messages: 2014-2020

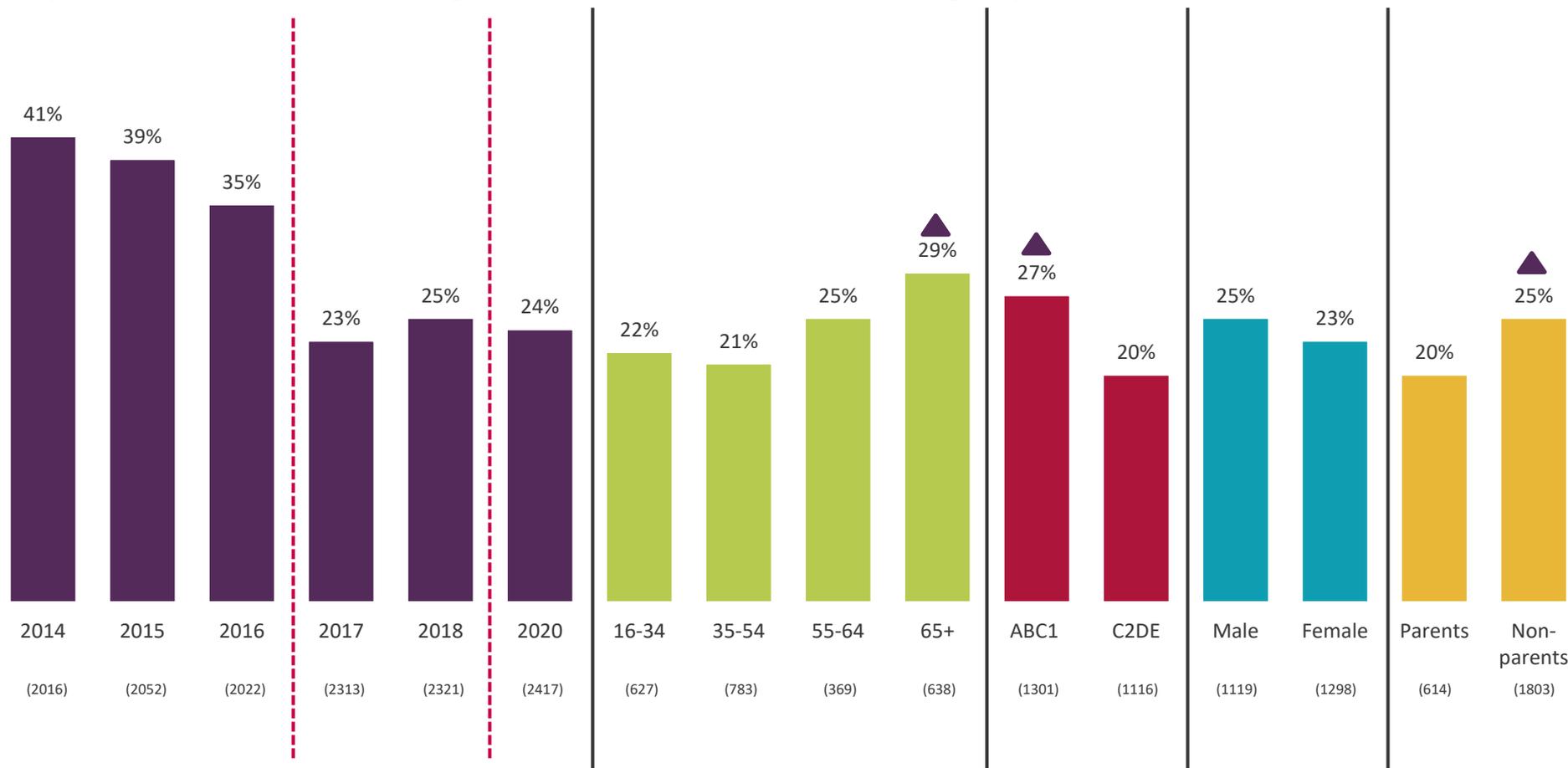
The 65+ age band are the least aware of product placement and of trailers or promotions for websites/other online services; while social grades ABC1 are more likely to be aware of all types of commercial messages; and programme sponsorship announcements and trailers or promotions for websites/other online services are mentioned more frequently by males than females – although the broad pattern of awareness is similar



QC2 – Which of the following, if any, are you aware of on television?
 Base: All with any TV sets in 2014 (2016); 2015 (2052); 2016 (2022); 2017 (2313), 2018 (2321), 2020 (2417) . Prompted, multicode. Significance testing shows any difference between 2018 and 2020. Survey method changed between 2017 and 2018.
 Source: Cross Platform Media Tracker 2020

A quarter of UK adults feel concerned about advertising on television. Concern levels have been reducing over time – but this has levelled off in recent years. Those aged 65+ are more likely to have concerns

Any concerns about advertising on TV: 2014-2020 and 2020 sub-groups



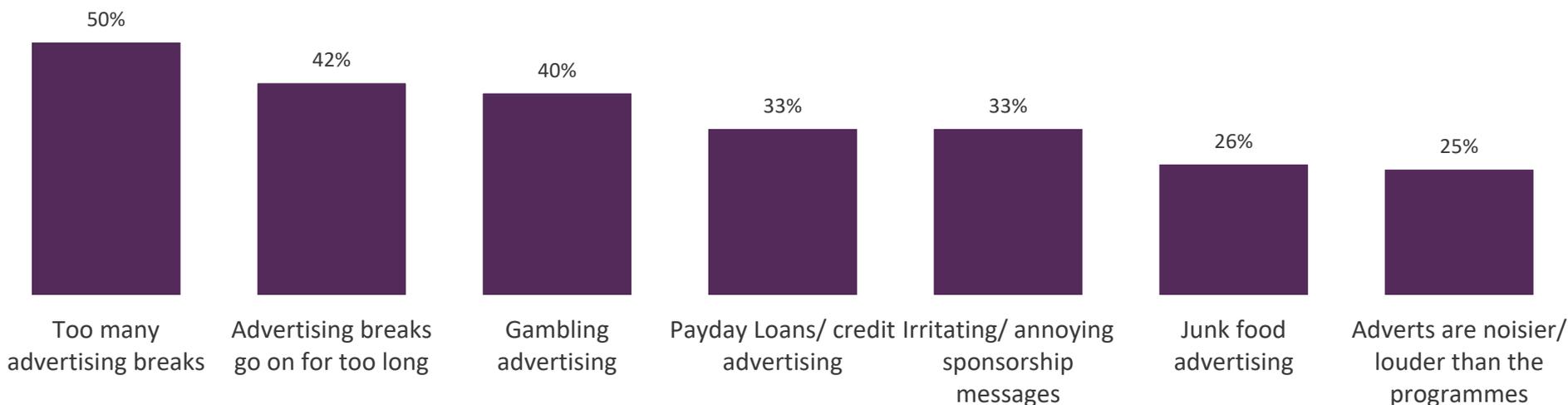
QC3a – Do you have any concerns about advertising on television?

Base: All with any TV sets (as indicated on chart). Unprompted, multicode. Significance testing shows any difference between 2018 and 2020, between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2020. Dashed line shows where survey method changed.

Source: Cross Platform Media Tracker 2020

The frequency and length of advertising breaks are the top two spontaneous advertising concerns mentioned

Concerns about advertising: 2020
(combined unprompted CAPI, CATI and prompted online data)



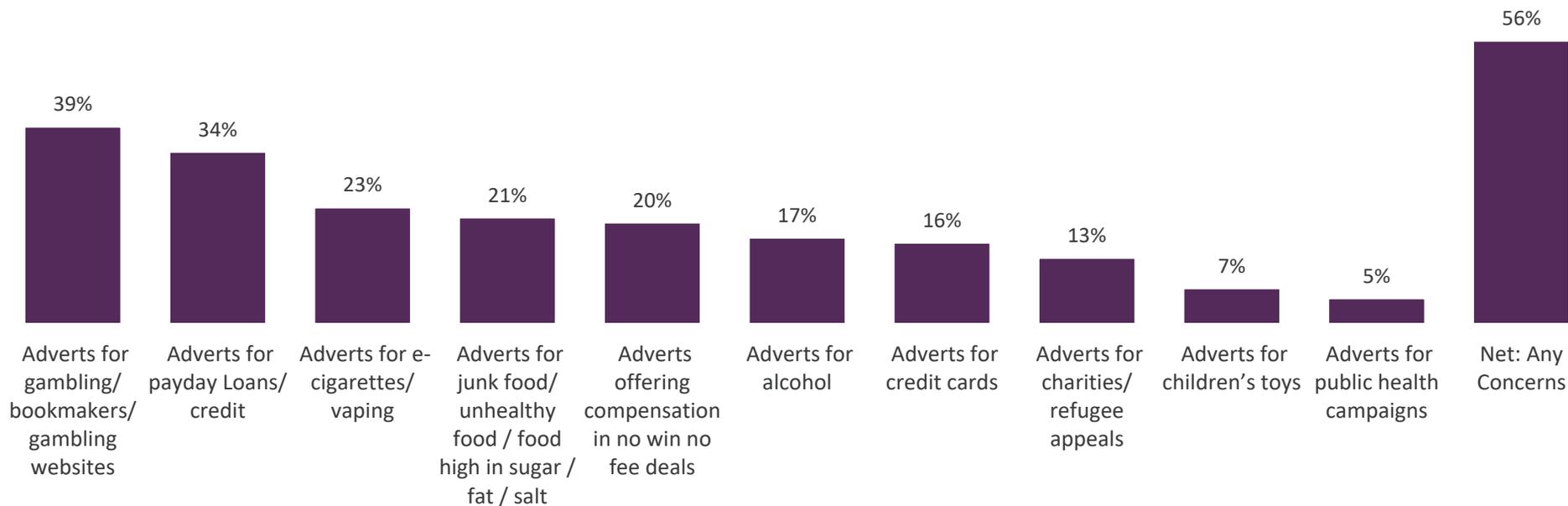
QC3 – What do you have concerns about?

Base: All with concerns about advertising (586). CAPI, CATI unprompted/online prompted, multicode. Top reasons charted (all over 25%).

Source: Cross Platform Media Tracker 2020

When prompted with specific categories of advertising, those relating to gambling and ads for payday loans/credit are the most concerning.

Types of advertising that cause concern: 2020 data



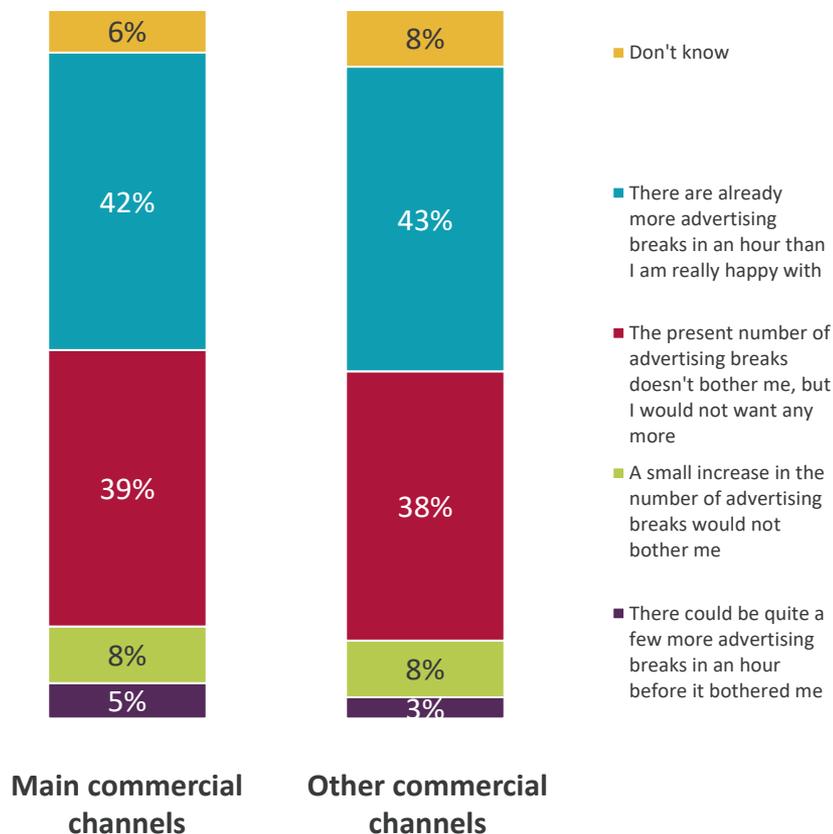
QC4 – Which of these **types** of advertising on television do you have any concerns about?

Base: All with working TVs at home (2417), Parents (614); Non- Parents (1803). Prompted, multicode.

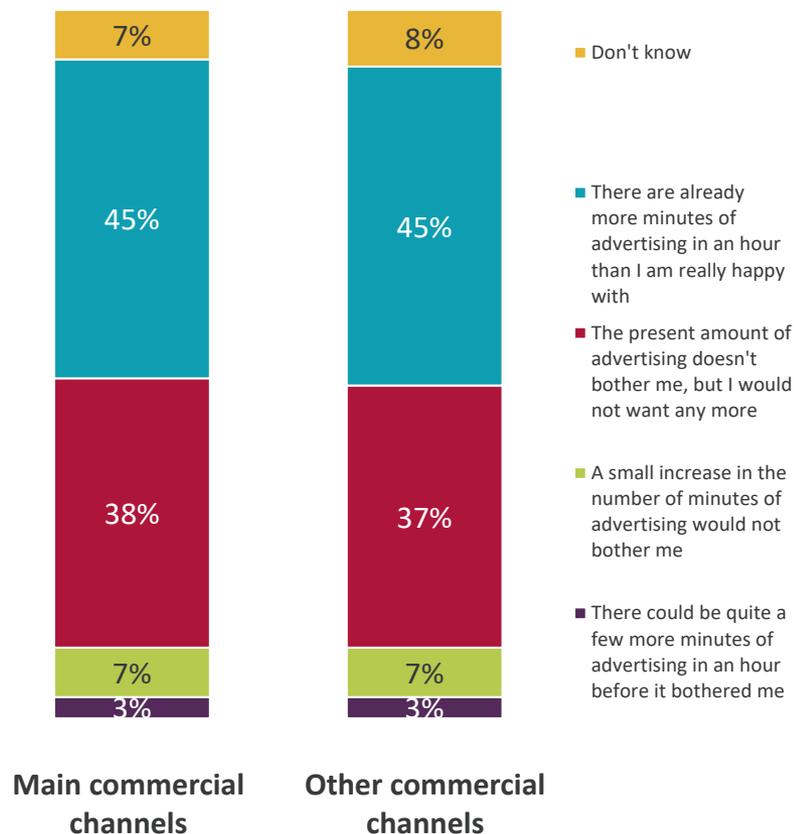
Source: Cross Platform Media Tracker 2020

Over two fifths think there are already more advertising breaks in an hour than they are happy with on main and other commercial channels, and there are similar attitudes towards the amount of advertising minutes per hour

Opinion on **frequency** of advertising breaks



Opinion on **amount** of advertising minutes

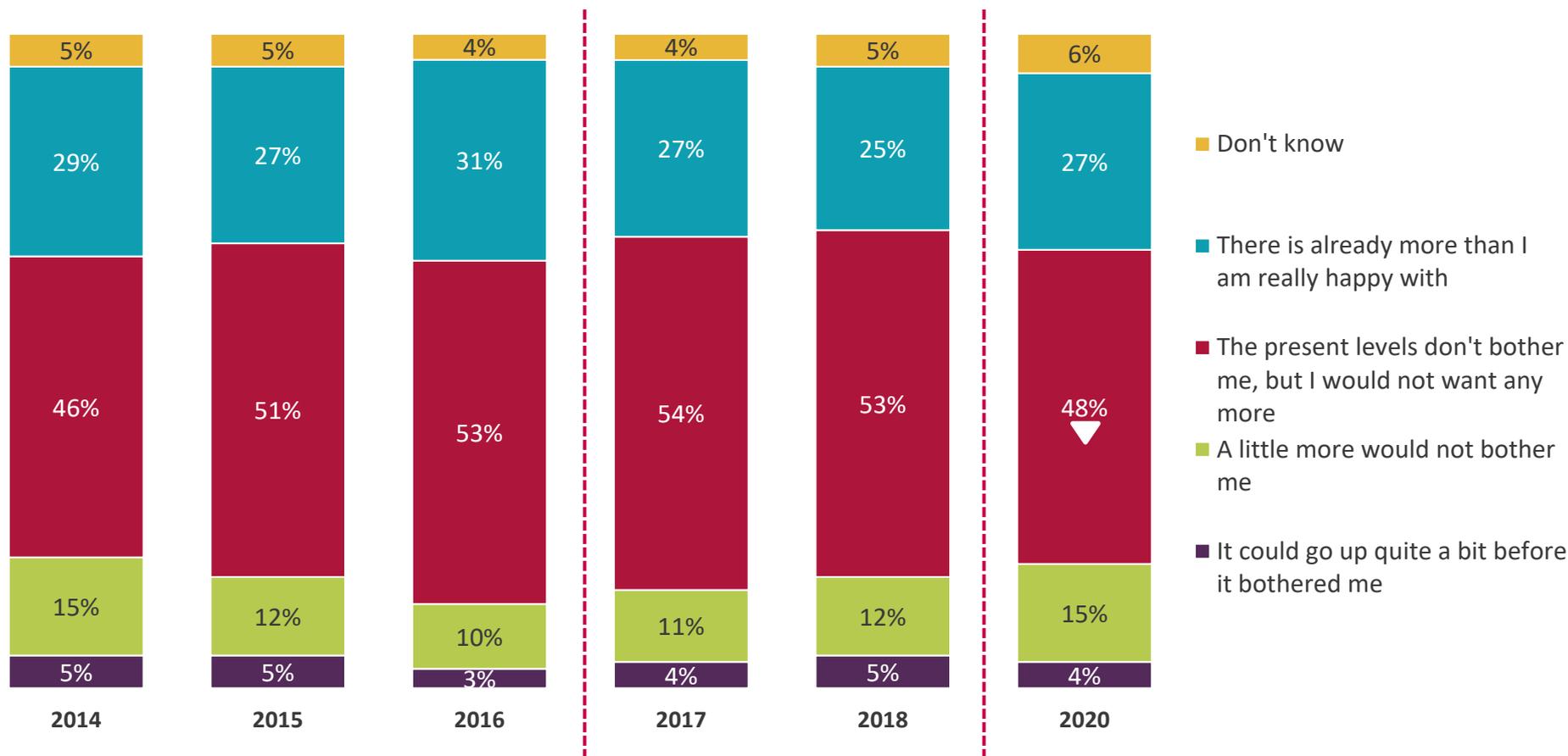


QC9/C10 – Which of these statements best describes how you feel about the frequency of advertising breaks on the main commercial free-to-air channels – that is ITV1, Channel 4 and Channel 5/ on the other commercial channels – all the other channels with adverts except for ITV1, Channel 4 and Channel 5?

Base: All with any TV sets in 2014 (2016); 2015 (2052); 2016 (2022); 2017 (2313), 2018 (2321), 2020 (2417). Prompted, single code. Significance testing shows any difference between 2018 and 2020. Dashed line shows where survey method changed.

Half of commercial radio listeners feel that the present level of advertising and sponsorship does not bother them but they would not want any more

Opinion on amount of commercial activity on radio: advertising and programme sponsorship: 2014-2020



NB this was asked as one question in previous years

QG4 – Which of these statements best describes how you feel about the amount of advertising and programme sponsorship (for example sponsorship of the weather or a competition) on commercial radio stations?

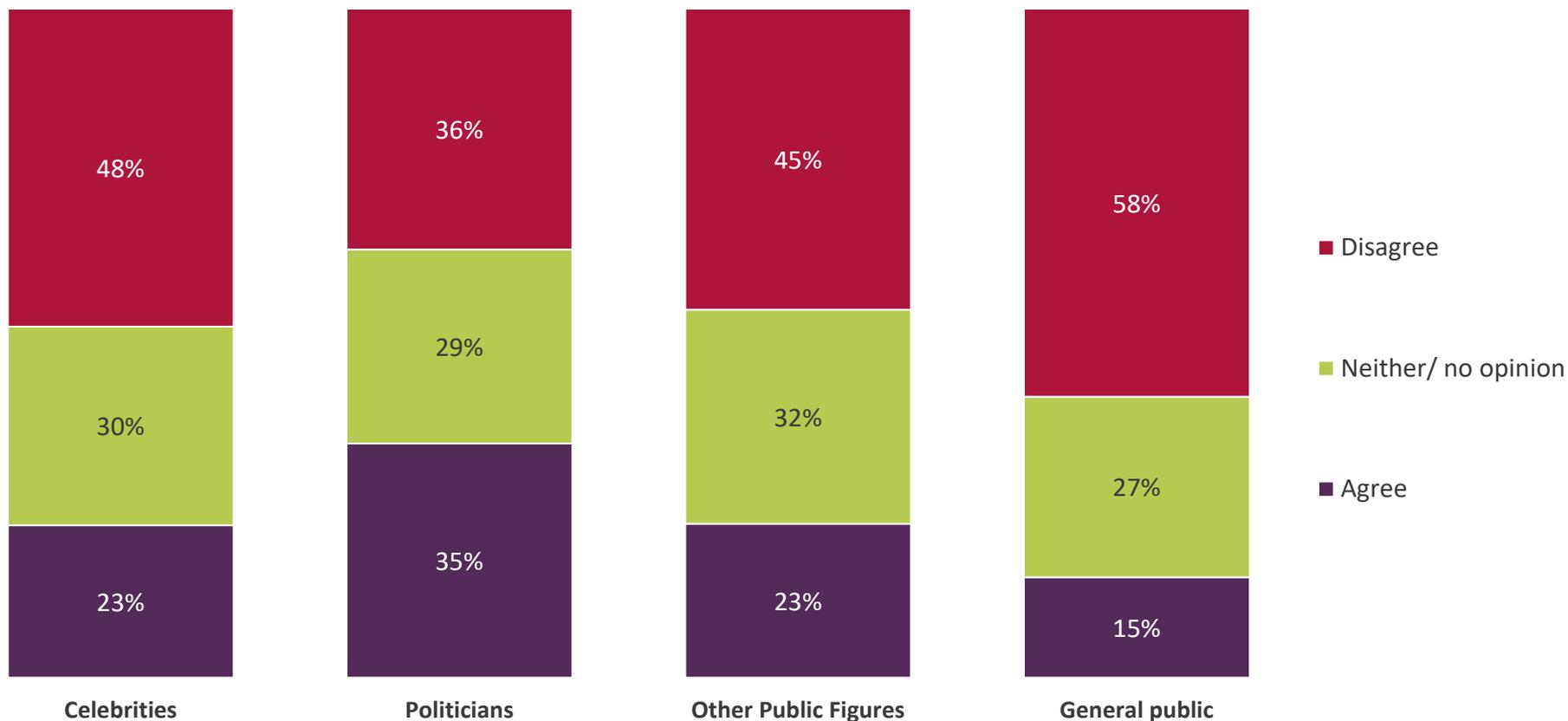
Base: All who listen to commercial radio stations in 2014 (752); 2015 (1165); 2016 (1145); 2017 (1337), 2018 (1339), 2020 (1551). Prompted, single code.

Significance testing shows any difference between 2018 and 2020. Dashed line shows where survey method changed.

Source: Cross Platform Media Tracker 2020

A higher proportion agree broadcasters should be free to show programmes that scrutinise the lives of politicians without consent, than for celebrities or other public figures – but this is a minority view

“TV broadcasters should be free to show programmes that scrutinise the lives of celebrities/ politicians/ other public figures/the general public without them giving consent”



QJ1A/B/C – Please can you tell me to what extent do you agree or disagree with each of the following statements I’m going to read out? – *TV broadcasters should be free to show programmes that scrutinise the lives of celebrities/ politicians/ other public figures without them giving consent*

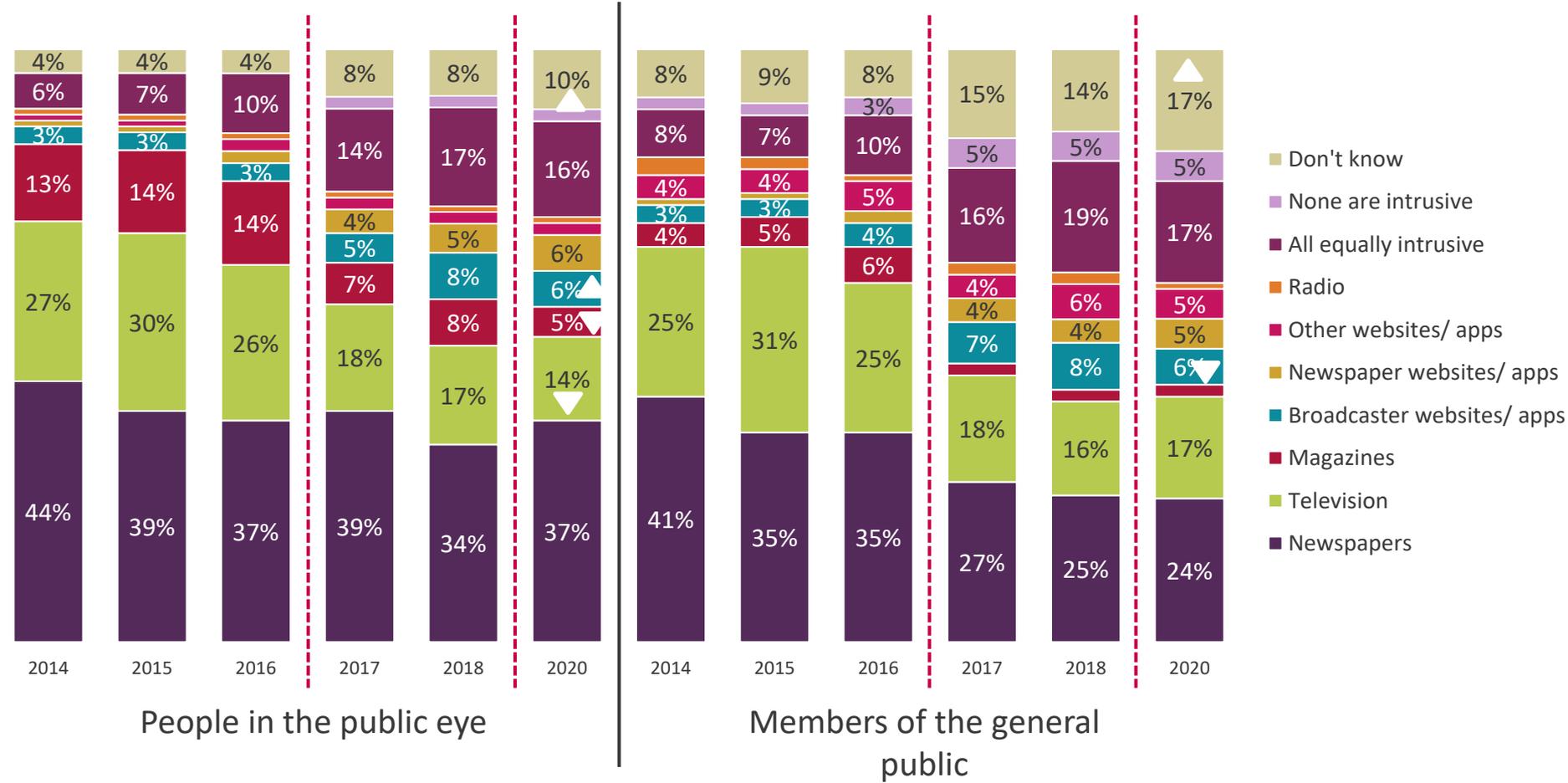
Base: All respondents in 2020 (2474). Prompted, single code.

Source: Cross Platform Media Tracker 2020

Newspapers are considered the most intrusive media in the case of both people in the public eye and the general public



Opinion on most intrusive media into the lives of people in the public eye/ members of the general public



QJ2/5 – Thinking specifically about people in the public eye – that is celebrities, politicians and other public figures rather than the general public, which one, if any of these sources do you feel is the most intrusive into the lives of these people?/ Now thinking specifically about members of the general public, which one, if any of these sources do you feel is the most intrusive into the lives of members of the public?

Base: All respondents 2014 (2074); 2015 (2107); 2016 (2069); 2017 (2386), 2018 (2384), 2020 (2474). Responses ≥ 3% labelled Prompted, single code. Significance testing shows any difference between 2018 and 2020. Dashed line shows where survey method changed. Source: Cross Platform Media Tracker 2020

Methodology and Weighting

2020 method change and comparisons to previous years

In previous years, this research has been conducted 50% face-to-face and 50% online.

In 2020, due to the Covid-19 pandemic – and in common with other Ofcom tracking studies with an element of in-home interviewing – it was not possible to conduct the research in this way after March 2020.

For this study, a combination of a online, face-to-face (up until March 2020) and telephone was used.

- Online n = 2051
- Face-to-face n = 156
- Telephone n = 267

As a result of this substantial shift in methodology, direct comparisons between the current and previous waves are not possible.

Methodology: adults

Sample

- 2,474 adults aged 16+ in the UK
- Quotas set on gender, age, and socio-economic group using Census data for each Primary Sampling Unit (PSU) covered for CAPI interviewing; as well as on working status, household size, children in household, ethnicity, disability and urbanity for online. The telephone interviews specifically targeted the 13% of UK adults who are not online and aimed for a profile broadly representative of this group.

Data Collection

- Mixed method: 83% online / 11% CATI respondents / 6% CAPI face-to-face interviews
- Conducted by BVA BDRC
- Fieldwork conducted in Q1 and Q4 2020. Fieldwork paused from end of March through September due to the Covid-19 pandemic
- Changes in the interview method in 2008, 2014, 2017 and 2020 are shown with a dashed line

Data Reporting

- Weighted to be nationally representative of the UK, and an overall weight applied to re-balance the contribution of each methodology (further detail on following slide)
- Total 2020 data tested against 2018 data for any statistically significant differences
- Sub-group data is from 2020 only – with measures for individual age groups tested against the total adults measure
- Testing also conducted between socio-economic groups (ABC1/C2DE), by gender and between parents and non-parents

2020 adults weighting

As a result of the change in approach in 2020 involving different proportions of the existing methodologies and the introduction of a new methodology, analysis was conducted to assess how best to combine and weight the data from the three methods to best provide consistency with the normal approach and thus allow trends to be tracked. A re-balancing of the contribution by method of 67% for online, 10% for CATI respondents and 23% CAPI face-to-face.

These proportions were determined on the principle of adjusting the contributions to be as close to the 50:50 online versus non-online methodology as collected historically as possible, while maintaining an acceptable weighting efficiency, on the basis that this best approximates the historic and anticipated future approach, thus retaining as much ability to track year-to-year while limiting the impact on the robustness of the data.