



Public Service Broadcasting Now and in the Future - Audience Attitudes

**A report plus research appendix
by Human Capital**

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1 Key messages from the report

- This research was undertaken by Human Capital for the BBC to inform its response to Ofcom's second review of Public Service Broadcasting (PSB). The research comprised six deliberative workshops involving a total of 126 participants and a quantitative survey of 4,577 respondents. All quantitative fieldwork was carried out by Ipsos MORI, based on a questionnaire designed by Human Capital.
- Audiences show continuing strong support for the aims and characteristics of public service broadcasting.
- Most participants in deliberative workshops thought that PSB is needed as much as ever to provide a continuing source of quality content.
- The rise of digital television and the internet meant for some workshop participants, however, that the need for PSB is diminishing.
- Reflecting the respective PSB obligations of the broadcasters, audiences recognise the BBC as the main deliverer of the public service aims; ITV1 and Channel 4 are in a second group, with Five further behind.
- Sky (including both specific Sky channels and the Sky platform) and local commercial radio were also mentioned unprompted in the deliberative workshops as providers of the public service aims, along with (to a lesser extent) some specialist channels like Discovery and The History Channel.
- In terms of the outcomes associated with plurality of provision of public service broadcasting, in the quantitative research a choice of programmes and channels strongly emerged as the single most important outcome.
- The BBC, ITV1 and Channel 4 are all perceived to make various, and distinct, contributions to the plurality outcomes. In the deliberative workshops, the BBC, with its broad range of services, was thought to play a key role in terms of choice and offering a range of views; ITV1 in terms of choice and contributing to UK and regional programming; and Channel 4 in terms of its range of editorial approaches and making a range of views available. Five was appreciated by some for its approach to news.
- Other digital channels and non-broadcast media were also thought by workshop participants to make significant contributions to the plurality outcomes, with non-broadcast media augmenting the diversity of views available and the other digital channels adding to the variety of programme approaches on offer. In combination with the finding that Sky is held in regard in terms of impression, this suggests that PSB provision is appreciated from broadcasters beyond those with designated obligations.
- When considering directly the future role of the commercial public service broadcasters, there is audience support for their continuing PSB commitments. However, despite this, and even when made aware of the genres where programming is at risk without intervention, in both the quantitative survey and the deliberative workshops there were low levels of agreement that ITV1, Channel 4 and Five should receive public money to support these PSB obligations.

- Further to this, when quantitative survey respondents were asked to comment directly on a range of different potential funding mechanisms that could support programmes with public service aims on these channels, all funding options received relatively low favourability scores, again indicative of a general reluctance amongst the audience to countenance the allocation of public money to the commercial PSBs.
- Whilst no funding method proves particularly popular (perhaps inevitably), within this context there is a preference towards those methods that do not affect respondents directly: namely, the National Lottery; giving other benefits to ITV1, Channel 4 or Five (for example, discounts on payments they may need to pay to broadcast); a tax on commercial broadcasters; and more advertising minutage. Funding methods that may be perceived to impact on the audience most squarely are the least popular. The allocation of some of the Licence Fee at its current level to the commercial PSBs and a direct Government grant rank fifth and sixth out of seven probed funding options, while the sharing of the Licence Fee at a higher level is the least popular of all.
- The research examined further attitudes towards the allocation of part of the Licence Fee to ITV1, Channel 4 and Five to fund public service programming. The evidence suggests that there is minimal to minority backing for this, with the proportion selecting this at a maximum of 31% when respondents have to give an initial reaction without being presented with all of the possible funding options, but is probably closer to 13% - the figure when audiences have a range of funding methods presented to them and so can take a more informed view. In any case, on the basis of this, the clear majority of respondents prefer other options over the allocation of the Licence Fee.
- On the link between the audience and public service broadcasters, it is clear that audiences feel differently about the BBC compared with other PSBs. As the quantitative data shows, audiences care more about the BBC, are more inclined to feel it belongs to the public and place higher expectations on the BBC compared with their feelings towards ITV1, Channel 4 and Five.
- The quantitative research also strongly suggests that the Licence Fee plays an important role in shaping the audience's link to the BBC. Because the public pays for the BBC via the Licence Fee, respondents say they feel more strongly about what the BBC does and how it spends its money. They have higher expectations of accountability than they do for other broadcasters, and there is also a higher expectation that the BBC should serve everyone since the public pays for it.
- There was evidence that the value to society delivered by the BBC is greater than the total amount collected through the Licence Fee. In the research, respondents were asked about the value of the BBC to society in pounds and pence per month. This suggested that the worth of the BBC to society lies between £20.43 per month (a top-down valuation of the whole BBC in the quantitative survey) and £31.57 per month (a bottom-up valuation, service by service, undertaken in the deliberative workshops). The difference between these value scores is broadly consistent with the respective methodologies employed and reflects the greater amount of prompting in the deliberative workshops. In any case, both are well in excess of the current Licence Fee of £11.63 per month.

2 Executive summary

2.1 Introduction

2.1.1 Background and research objectives

Human Capital was commissioned by the BBC Executive to carry out a programme of audience research investigating attitudes towards public service broadcasting (PSB) and plurality.

Beneath this overarching aim, the research explored a number of specific objectives, namely to understand:

- The perceived importance of public service broadcasting and the perceived performance of broadcasters in delivering it;
- Attitudes to the plurality of provision of public service broadcasting;
- Attitudes to new potential sources of funding for public service broadcasting in the future;
- The role of the internet in delivering the public service aims;
- The audience relationship with the public service broadcasters and the perceived value of the BBC.

2.1.2 Research methodology

The research was designed in two phases – first, a series of deliberative workshops and, second, a piece of quantitative research:

- The first phase would explore, in depth, attitudes held on a broad range of issues relating to public service broadcasting and plurality. It would also seek to understand the reasons underpinning any stated views.
- The second phase would then take forward the key issues with a view to generating statistically robust findings from a large-scale, quantitative survey of a nationally representative sample.

2.1.3 The deliberative workshops

The deliberative workshops ran for four hours per session. Six workshops were conducted, each comprising 20-22 participants, with the sample across all six workshops totalling 126. The workshops took place in Carmarthen, Coventry, Edinburgh, London, Manchester and Tiverton, over January and February 2008.

Participants were recruited with the aim of achieving, across the whole sample and as far as possible within each workshop, representation on the following key dimensions: age, gender, socio-economic grade (SEG), amount of TV watched, TV platform, internet access, ethnicity and attitude towards the BBC (so as to ensure the sample included those with a range of views towards the BBC).

2.1.4 The quantitative survey

The quantitative study comprised a face-to-face and an online questionnaire survey, both using the same questions, conducted over the period 2-28 May 2008. The data from the two methods was merged to form a dataset comprising 4,577 16+ adults from across the UK, with 2,068 face-to-face and 2,509 online respondents. All quantitative fieldwork was carried out by Ipsos MORI, based on a questionnaire designed by Human Capital.

2.1.5 About Human Capital

Human Capital is an independent research, strategy and development consultancy, specialising in the media sector. For more information, please see www.humancapital.co.uk.

2.2 Attitudes to public service broadcasting

2.2.1 Research focus

- The first part of the deliberative research set out to understand (unprompted) the role that broadcasting played in the lives of the participants. The notion of public service broadcasting was then introduced and participants were asked to comment.
- The workshops explored participants' unprompted views on the locus of responsibility for public service broadcasting and then explained the nature of the statutory obligations on the BBC and the commercial public service broadcasters.
- The workshops went on to investigate attitudes towards the aims and characteristics of public service programming, as set out by Ofcom and the BBC Charter, as well as views on the different programming genres. The quantitative research similarly explored the public service aims and characteristics.

2.2.2 The role of broadcasting

- In the deliberative workshops, almost all participants regarded broadcasting as an important – and influential – aspect of life today. Only a small number of these participants said they would not miss broadcast media if it became unavailable.
- Unprompted, broadcasting was seen to play three major roles: a source of information; a source of learning; and a source of entertainment.
- Television was the principal broadcast platform for almost all workshop participants.
- At the same time, radio was highly regarded by many workshop participants, particularly valued for its ability to keep people in touch with their local communities and for its companionship.

2.2.3 The importance of public service broadcasting

- The vast majority of workshop participants showed a clear grasp of the idea of public service broadcasting when it was introduced, even if they were not familiar with the exact terminology. A range of positive views and programming examples were articulated, with the following being the most commonly cited themes (in order of frequency of mention):

- Keeping in touch with the news;
 - Making the world a smaller place;
 - Education;
 - Offering a window into other people's lives;
 - Providing common reference points;
 - Acting as a catalyst for social change;
 - Maintaining high standards across UK broadcasting generally.
- A minority of workshop participants felt that broadcasting (including public service broadcasting) could be less beneficial for society when it was abused by those making editorial decisions (for example, some participants worried that broadcasters pursued particular editorial approaches in order to influence people's views). A small number also thought it could encourage people to live vicariously or could have a detrimental effect on family life.
 - Most workshop participants felt that the need for public service broadcasting was as strong as ever – in order to provide a continuing source of quality content, associated with public service broadcasting. A minority felt that the need was weakening in the face of so much choice now offered by multichannel television.

2.2.4 Responsibility for public service broadcasting

- When asked who they thought had responsibility for public service broadcasting, most participants in the deliberative workshops stated (unprompted) that the BBC was at the heart of public service provision. A wide range of BBC services were mentioned in this context, especially television and radio services, as well as the BBC's online service to a lesser extent.
- A smaller number suggested ITV, along with Channel 4, and Sky (both specific Sky channels and the Sky platform). This second group also included local commercial radio.
- In a third group, further behind, a small number of participants mentioned Five. One or two participants also mentioned Discovery and The History Channel.

2.2.5 Attitudes to the public service aims and characteristics

- All those involved in the research – both deliberative workshop participants and quantitative survey respondents – were invited to rate the six public service aims, based on Ofcom's PSB purposes. All of the public service aims were considered important by the audience, especially the aims to increase understanding of the world and to encourage learning.
- Workshop participants were also asked to comment on a series of public service characteristics, based on Ofcom's PSB characteristics. Again, all were thought to be important, with many participants feeling that good quality programming should naturally embody as many of these characteristics as possible. The quantitative research corroborated this, with about three-fifths (or more) of respondents giving a score of at least 8 out of 10 for each of the characteristics.

- Whilst not stated Ofcom PSB characteristics, 'showing programmes about the different regions of the UK', 'fair and balanced' and 'to be trustworthy' were also included to make the research as comprehensive as possible. Of all probed characteristics, trustworthiness was regarded most highly by the quantitative sample.
- As an explicit characteristic, UK-made content was considered relatively less important, with some workshop participants citing several of the big US shows and expressing a view that programme quality was more important than its provenance. The quantitative research echoed this finding with the reflection of life in the UK and life in the UK regions both rated relatively less important compared with most characteristics. However, in a later question, when assessing programme genres in terms of their importance to workshop participants both personally and to society as a whole, non-UK programmes were deemed relatively unimportant.

2.2.6 Attitudes to different programming genres

- When asked to score different programming genres in terms of, first, importance to themselves personally and then to the aims of PSB for society as a whole, workshop participants considered news, regional news and current affairs to be the most important in both regards.
- Children's, reality programming, education and non-UK programming were the least important to workshop participants *personally*. Thinking about *society as a whole*, non-UK programming and reality programming were considered least important. Children's and education programming were thought to be much more important to society as a whole than to participants personally.

2.3 Delivery of public service broadcasting

2.3.1 Research focus

- The purpose of this part of the research was to explore impressions of the public service broadcasters and their effectiveness in delivering the public service aims.
- The deliberative research also looked at the role of the internet in terms of its current usage by participants and as a potential medium for public service content.

2.3.2 Impressions of the public service broadcasters

- Almost all workshop participants felt differently about the BBC compared with the other public service broadcasters. In part, this was related to the widespread appreciation of the link between the audience and the BBC via the Licence Fee. Participants gave the BBC the highest score for general impression. The key strengths of the BBC were perceived to be (in order of frequency of mention):
 - Impartiality and trusted guide;
 - Freedom from advertising and commercial influence;
 - Expectation of something for everyone;
 - Authority;
 - Worldwide reputation.

- At the same time, most workshop participants believed that the BBC had some weaknesses: in particular, that it was becoming increasingly drawn into having to compete with other broadcasters. In addition, the BBC's status as a serious, trusted guide meant that it was also widely perceived to be somewhat risk-averse and not innovative enough in terms of programming.
- The quantitative data confirmed the findings from the deliberative workshops, with the BBC achieving the best impression amongst respondents. 45% gave a score of at least 8 out of 10.
- In terms of other broadcasters, many participants in the workshops had high levels of affection for ITV. They particularly appreciated its regional strengths. Generally, public service expectations of ITV were lower (than of the BBC), since participants perceived that ITV provided a smaller range of services and a more limited public service offering.
- Channel 4 was seen by workshop participants as edgy, innovative and often thought-provoking. The flipside of this impression was that the channel was often seen to court controversy.
- As regards Five, the channel was noted by workshop participants for its quality imported programming.
- In line with the findings from the deliberative workshops, ITV and Channel 4 were also rated lower than the BBC in the quantitative study. Whereas 45% gave the BBC a score of at least 8 out of 10 in terms of general impression, the figures for ITV and Channel 4 were 31% and 24% respectively, and 15% for Five.

2.3.3 Delivery of the public service aims

- Both in the deliberative and quantitative phases, the BBC was seen to be most effective in delivering the public service aims, reflecting respondents' general impression of the organisation and an appreciation of the BBC's broader public service obligations.
- ITV1 and Channel 4 were grouped in a second tier in terms of their delivery of the public service aims. Five received the lowest quantitative scores, perhaps reflecting the fact that the channel has the least extensive PSB obligations. Workshop participants in London, however, tended to have a somewhat greater appreciation of the range of programming offered by Five, including news.
- Notwithstanding these views in relation to specific organisations, overall there was a widespread feeling in the workshops that the main broadcasters were facing challenges in delivering their stated public service aims. Many participants felt that, with the number of channels rising, these broadcasters were becoming increasingly drawn into competing with other broadcasters.

2.3.4 The role of the internet

- For participants in the deliberative workshops, the internet was seen primarily as a functional tool – for example, for communicating, finding information (including the news) and shopping. Social networking was also mentioned as an important aspect of the internet by some of the younger participants. The benefits of convenience and

control were widely thought to be extremely important.

- Most internet-using-participants in the workshops did not yet regard the internet as a source of long-form audio-visual content on a par with the television, even though they typically used it to watch video clips. Accordingly, interest in using the internet to access television or radio programmes was generally fairly low, although slightly higher amongst younger users. (It should be noted, however, that the deliberative groups took place in January and early February 2008 when BBC iPlayer had only just been launched.)
- Whilst awareness of the benefits of the internet was high, there was also very high awareness of the risks associated with using the internet – centred on inappropriate content for the young.
- News, music and sport were considered to be the content areas where the internet was most effective, with many workshop participants stating that they used the internet to pursue news stories in more detail or to cross-reference facts.
- Upon further reflection, some workshop participants suggested that the risky nature of the internet heightened the need for a safe public service zone. Indeed, some saw an opportunity for the BBC to consolidate its position as a trusted guide on the internet.

2.4 Attitudes to plurality

2.4.1 Research focus

- The purpose of this section was to explore attitudes to the plurality of provision of content in line with the public service aims.
- The research explored attitudes to some potential outcomes that could result from plurality of provision and the importance of plurality across different genres. It went on to investigate views on the future role of ITV1, Channel 4 and Five and on the question of supporting these broadcasters with public money.
- In the deliberative workshops, participants also discussed the roles of different players in contributing to the plurality outcomes. The research was designed to understand views on plurality across all providers in the market, not only the public service broadcasters.
- Workshop participants also explored plurality from the point of view of four possible future television schedules from the terrestrial channels, trading-off the pros and cons of each.

2.4.2 The importance of the plurality outcomes

- Deliberative workshop participants were asked to think about the following four potential plurality outcomes and to rate each in terms of its importance:
 - A choice of high quality and fresh programming;
 - Access to a diverse range of views;
 - Different editorial approaches;
 - A range of UK and regional programming.

- All four prompted outcomes of plurality were considered important by workshop participants. They instinctively felt that plurality was a spur to competition which could be useful in driving up quality and choice. Choice of high quality and fresh programmes emerged as the most important of the four outcomes probed in the workshops.
- In the quantitative study, respondents were asked to choose the single most important plurality outcome from a list that unpacked choice and quality:
 - The opportunity to hear different points of view;
 - A choice of channels and programmes so that everyone can try to find something that appeals to them;
 - Higher quality programmes because of competition between broadcasters
 - None of these.
- Similar to the deliberative finding, the most popular of these was a choice of channels and programmes, with 58% of respondents choosing it as the most important outcome.

2.4.3 The role of different players in relation to the plurality outcomes

- In the workshops, the BBC, with its broad range of services, was considered to have a key role in contributing to choice. It was also thought to perform well in terms of offering a (balanced) range of views.
- ITV1 was perceived to be the big mainstream alternative to the BBC. It rated highly in terms of choice, as well as for its contribution to UK and regional programming.
- Many workshop participants mentioned that Channel 4 made a very positive contribution to the range of editorial approaches on offer, particularly in drama and documentaries. Some participants also acknowledged that Channel 4 played an important role in extending the range of views available, for instance via Channel 4 News.
- Beyond the main public service broadcasters, the digital channels and other (non-broadcast) media players were also perceived to make a considerable contribution to the plurality outcomes.
- In particular, the digital channels, when taken together, were seen to make a valuable contribution to the variety of programming approaches available. Some participants said that the range of digital channels available on the Sky platform worked in a similar way to the BBC's portfolio of channels. In combination with the finding that Sky is held in high regard in terms of impression, this suggests that PSB-type provision is appreciated from broadcasters beyond those with designated obligations.
- Regarding non-broadcast media, many workshop participants highlighted the diversity of views offered by newspapers and the internet, while a few also mentioned Teletext and magazines. There was a broad understanding that, whilst television channels have a duty to present balanced news bulletins, newspapers and websites typically offer content from the point of view of particular political orientations. Taken as a whole, workshop participants believed that they contribute a very wide range of views.

- In addition to the range of *editorial* views put forward by different newspapers and internet sites, some workshop participants also pointed at the range of views expressed by *users* by means of discussion forums hosted on websites.
- Finally, some workshop participants mentioned the role of (local) newspapers and websites in providing content about different areas of the UK. For this reason, other media also scored relatively well on the range of UK / regional content.

2.4.4 Importance of plurality of public service provision across genres

- In relation to programme genres, respondents in the quantitative research were asked to pick up to five genres in which they thought it would be important to have plural provision, bearing in mind that having more than one broadcaster showing these types of programmes could require up to the equivalent of £15 per household per year in public funding for ITV1, Channel 4 or Five.
- The most popular choices from a list of 15 genres were national and international news (54%), followed by regional news (44%), current affairs (43%), education (37%), serious documentaries (36%) and drama (34%)¹.

2.4.5 Attitudes to alternative television schedules

- The deliberative workshops approached the issue of plurality from a more practical – and familiar – point of view: namely, by means of discussion around representative television schedules with varying mixes of public service programming from the different broadcasters.
- The different schedules were introduced to participants in a neutral manner and were labelled A–D. (The descriptive names used below were not revealed to participants.) The four schedules were:
 - ‘Current mix of PSB’: this was designed to illustrate a rich mix of programming broadly similar to today’s offer, incorporating drama, entertainment, comedy, news, current affairs and factual programming;
 - ‘More commercially attractive’: this was designed to illustrate a commercial world with no public service intervention – the schedule skewed towards more commercial genres on the commercial broadcasters, with less emphasis on delivery of the current affairs and factual programming; no change to BBC One or BBC Two;
 - ‘Mid-way’: on this schedule, the offering on the commercial channels was positioned half way between the Current mix of PSB and the More commercially attractive schedules; again, no change to BBC One or BBC Two;
 - ‘Less commercially attractive’: this was designed to illustrate an increased investment in less commercially attractive, narrowly focused PSB with a greater concentration of factual and current affairs programming – both from the commercial broadcasters and from the BBC.
- In order to explore participants’ attitudes towards the schedules in various circumstances, this section of the workshop was structured as follows:

¹ The other genres included in the research were: sport, entertainment, children’s, comedy, soaps, lifestyle, other programming from your part of the UK, music and factual formats & reality.

- After prompting on the difference between the genres, participants discussed the key genre differences between the schedules;
 - They were then asked to rank them, firstly thinking about which schedule they personally preferred and then thinking about society as a whole;
 - Following this, the likely costs that would be associated with each schedule in five years' time were introduced, and, with these costs in mind, participants were then invited to rank the schedules again, both for themselves and society.
- When asked to explore the trade-offs between the four alternative schedules – thinking about their personal preferences and before costs were introduced – the 'Current mix of PSB' emerged as the most popular schedule with participants.
 - Just under half of the sample ranked this schedule as their personal first choice. They liked the variety of programming on offer from individual channels and also the choice available at any one time across channels. For many participants, it was important for all the main broadcasters to offer national news. They also recognised (unprompted) that this schedule was close to today's schedules.
 - Some participants liked the 'More commercially attractive' schedule, because it offered more opportunities for relaxation and escapism. Some younger participants also appreciated the greater amount of acquired programming on offer. On the other hand many participants felt it was too light-hearted, offering lower quality programming than the other schedules. The omission of regional news on ITV1 was unpopular.
 - The 'Less commercially attractive' schedule polarised participants. Some welcomed its rather more serious tone and the inclusion of more children's programming, but for most it seemed far too heavy and boring.
 - When workshop participants discussed the schedules from the point of view of society as a whole, the overall ranking pattern was broadly similar to the personal rankings, although the 'Current mix of PSB' schedule was more popular. The more commercially attractive schedules were deemed less relevant to society as a whole than the richer mix of programming found in the 'Current mix of PSB' schedule.
 - When the likely costs associated with each schedule were factored in, the 'Current mix of PSB' remained the most popular with participants *personally*. There was some movement away from this schedule and towards the less expensive, more commercially attractive schedules. On the whole, however, the additional costs seemed relatively small compared to the practical on-screen benefits.
 - Thinking about society as a whole, there was a more pronounced shift towards the cheaper, more commercially attractive schedules, with a significant minority of participants opting for one of these schedules as their first preference when costs were factored in. This was primarily because they were worried about the ability of people in the wider community to pay for the other schedules.
 - Overall, on the issue of paying to maintain plurality of provision across the public service broadcasters, the schedules ranking exercise revealed that participants were relatively more inclined to pay *personally* than to impose those costs on *society*. The schedules exercise also highlights the subtleties of understanding audience attitudes towards the public funding of plurality of PSB provision. Despite support for PSB across the commercial PSBs, enthusiasm fell substantially (perhaps also inevitably)

when the costs associated with its continuation were factored in. As seen in section 2.4.6, this finding was confirmed by subsequent questioning in the deliberative workshops and the quantitative survey where audiences expressed themselves largely in favour of the commercial PSBs retaining their PSB responsibilities, yet again were reluctant to allocate public money to these broadcasters, even when made aware of the genres at risk without intervention. Overall, the research shows that, whilst there is audience support for plurality in principle, there is much less appetite to back it financially in practice.

2.4.6 The future role of ITV1, Channel 4 and Five

- The research then considered directly the future role of ITV1, Channel 4 and Five.
- The study probed how important audiences felt it was for ITV1, Channel 4 and Five to continue to be required to deliver public service programming in the future, and whether, given the likely costs involved, they should receive investment of public funding to support this.
- In both the deliberative and quantitative phases of the research, there was agreement about a future public service role of ITV1, Channel 4 and Five, especially for ITV1 and Channel 4. In the quantitative survey, 61% of respondents agreed that ITV1 should continue to be made to show programmes with public service aims, alongside the BBC, compared to 12% who disagreed. The comparable numbers for Channel 4 were 57% agreeing and 15% disagreeing, and for Five 50% agreeing and 16% disagreeing.
- Notwithstanding this support and even when made aware of the genres² where programming was at risk without intervention, there was much less backing both in the deliberative and quantitative work for the notion that public money should be used to support the future public service commitment of these broadcasters. In the quantitative research, there were relatively low levels of agreement (27% at most), with 54% of respondents *disagreeing* that public money should be used to support ITV1 and 27% *agreeing*, 55% disagreeing in relation to Channel 4, with 25% agreeing, and 58% disagreeing in relation to Five, with 20% agreeing. The views expressed in the deliberative workshops shed light on the reasons for this swathe of opinion:
 - Many participants thought that high quality programming should be capable of earning sufficient advertising revenue and that, as commercial businesses, they should stand on their own feet. Participants expressed concern at what they perceived to be a subsidy for commercial businesses;
 - In addition, many participants worried about imposing costs on other people, even if they themselves could afford it;
 - Finally, some participants objected to the principle of paying more on top of the Licence Fee and pay TV subscriptions.
- Overall, the views expressed in this part of the research were consistent with the earlier schedules exercise in that both workshop participants and quantitative survey respondents largely supported the idea of plurality of provision across the public service broadcasters. However, indicative of the complexity surrounding audience views on this matter, when thinking directly about the status of the commercial broadcasters, they were reluctant to commit public money to them to support this, with

² Current affairs, serious documentary, regional news, one-off UK drama, children's programmes

workshop participants going on to argue that they disliked the idea of using public money to subsidise commercial companies.

2.5 Attitudes to sources of funding

2.5.1 Research focus

- This part of the research considered preferences in relation to different potential sources of funding for public service content in the future, alongside the BBC.
- The research went on to explore attitudes to the Licence Fee in more detail, in particular attempting to understand the extent to which the audience's link to the BBC was influenced by the existence of the Licence Fee.
- Finally, the research explored the perceived value of the BBC.

2.5.2 Attitudes to the funding options

- In both the deliberative and the quantitative it was made clear that, in the future, there were different ways that public funding could be provided to ITV1, Channel 4 and Five so that they could continue to show programmes with the public service aims.
- Five potential funding options were described in the deliberative work:
 - A government grant from the general pool of taxation;
 - The National Lottery;
 - A higher BBC Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - and an unaffected BBC;
 - The same BBC Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - and less money for the BBC, which might affect what the BBC can do;
 - A general tax to be paid by all commercial broadcasters.
- Two more options were added in the quantitative study:
 - Give other benefits to ITV1, Channel 4 and Five e.g. discounts on payments they may need to pay to broadcast (i.e. spectrum pricing);
 - Allow ITV1, Channel 4 and Five to show a few more minutes of advertising.
- When asked to comment directly on these different potential funding mechanisms, all options received relatively low favourability scores from quantitative respondents. This lack of enthusiasm is in line with earlier findings from both the deliberative workshops and in the quantitative survey where, although in favour of the commercial PSBs retaining their responsibilities to provide PSB programming alongside the BBC, audiences were, notwithstanding, reluctant to commit public money to these broadcasters, even when made aware of the genres where programming was at risk without intervention.

- Whilst no funding method proved particularly popular, within this context of a general disinclination towards providing public money, in the quantitative research there was a preference towards those methods that did not affect respondents directly: namely, the National Lottery; giving other benefits to ITV1, Channel 4 or Five (for example, discounts on payments they may need to pay to broadcast); a tax on commercial broadcasters; and more advertising minutage. In the deliberative workshops, the least direct funding options were also deemed more acceptable.
- In the quantitative study, the funding options that could be perceived to affect audiences most squarely emerged as the least popular. The redistribution of the Licence Fee at its current level and a direct Government grant ranked fifth and sixth out of the seven probed funding options, while the sharing of the Licence Fee at a higher level was the least popular method.
- This echoed the findings from the deliberative workshops. Participants had disliked the idea of paying through general taxation, since this implied that tax rates might have to go up. Equally, there was low support for distributing some of the Licence Fee at its current level. Many workshop participants expressed a feeling that, given its central role in the provision of public service broadcasting, the BBC should not be compromised in its ability to offer high quality programming and that, in the face of declining standards, it should be protected. A very small minority felt that there were BBC services that they could forgo (e.g. BBC Parliament).
- The idea of sharing the Licence Fee at an increased level was also generally very unpopular amongst workshop participants. Only very small minority of these participants stated they could see this making sense, if it would help to maintain quality standards, as it was an established means of collecting money off people.
- The research examined further attitudes towards the allocation of part of the Licence Fee to ITV1, Channel 4 and Five to fund public service programming. The evidence suggests that there is minimal to minority backing for this, with the proportion selecting this at a maximum of 31% when respondents have to give an initial reaction without being presented with all of the possible funding options, but is probably closer to 13% - the figure when audiences have a range of funding methods presented to them and so can take a more informed view. In any case, on the basis of this, the clear majority of respondents preferred other options over the allocation of the Licence Fee.

2.5.3 The role of the Licence Fee in linking the audience and the BBC

- Given the complexity – and importance – of the audience's attitude towards the Licence Fee, the research went on to understand the extent to which the audience's link to the BBC was influenced by the existence of the Licence Fee.
- First, quantitative survey respondents were asked about their attitudes towards the BBC, ITV, Channel 4 and Five. Then, they were asked to indicate the extent to which they believed that the existence of the Licence Fee determined the way they felt towards the BBC, compared with the way they felt towards other public service broadcasters.
- Overall, quantitative respondents indicated that they cared more about the BBC, were more inclined to feel it belongs to the public and had greater expectations of the BBC than of the other public service broadcasters. In particular:

- Nearly two-thirds (64%) of quantitative respondents agreed that they cared a lot about the BBC and its programmes and services, compared with around half for ITV1 (49%), two-fifths for Channel 4 (39%) and one-quarter for Five (24%);
 - Over 7 in 10 survey respondents (71%) agreed that the BBC belonged to the public, compared with around 3 in 10 for ITV1 (33%) and Channel 4 (28%) and 2 in 10 for Five (22%);
 - Finally, 84% of survey respondents expected the BBC to appeal to everyone compared with 74% for ITV1, 66% for Channel 4 and 58% for Five.
- Quantitative survey respondents were then asked to indicate the extent to which they believed that the existence of the Licence Fee determined their feelings towards the BBC, compared with their feelings towards other public service broadcasters, in relation to four aspects of the link: strength of feeling; care about how money is spent; accountability; provision of programmes that suit everyone's tastes.
 - The quantitative research strongly suggests that the Licence Fee plays an important role in shaping the audience's link to the BBC. Because the public pays for the BBC via the Licence Fee, survey respondents said they felt more strongly about the BBC generally, compared with other broadcasters, and specifically in terms of accountability (both financial and regarding what the BBC shows and does) and an expectation that the BBC should serve everyone. This reflected the deliberative discussions in which participants felt that the Licence Fee created a link to the BBC and placed special obligations on the BBC in terms of trustworthiness, accountability and a responsibility to serve everyone.
 - The quantitative research showed that:
 - Two-thirds (66%) of respondents felt that the existence of the Licence Fee made them feel more strongly about the BBC than they did about other broadcasters;
 - Three-quarters (75%) said it led them to care more about how the BBC spends its money than about how other broadcasters spend their income;
 - Three-quarters (75%) said it led them to expect more programmes to suit everyone's tastes than what they would expect from other broadcasters;
 - Four-fifths (81%) said the Licence Fee led them to expect greater accountability from the BBC than other broadcasters.

2.5.4 The perceived value of the BBC

- The research also looked at how much respondents valued the BBC in terms of pounds and pence. This was examined in two ways:
 - In the deliberative workshops, a 'bottom-up' approach was taken where participants indicated, service by service, what they felt each was worth to society. This service-by-service approach yielded a figure £31.57 per month.
 - In the quantitative survey, a 'top-down' approach was taken. This method used a range of fixed prices at which the Licence Fee could be set in the future and asked respondents to indicate whether, in a hypothetical national vote on the future of the BBC and thinking of its value to society overall, they would vote to

keep the BBC open as it is at each price (shown in random order) or vote to close down the BBC and stop charging the Licence Fee. This top-down approach generated a figure of £20.43 per month.

- The difference between the value scores obtained in the workshops and the quantitative survey is broadly consistent with the respective methodologies employed and reflects the greater amount of prompting in the deliberative workshops. The values generated compare to the current Licence Fee of £11.63 per month, and thus show that the value to society delivered by the BBC is greater than the total amount collected through the Licence Fee.

3 Introduction

3.1 Background

Human Capital was commissioned by the BBC Executive to carry out a programme of audience research investigating attitudes towards public service broadcasting (PSB) and plurality.

The purpose of the research is to help inform the BBC's submission to Ofcom's second review of public service broadcasting, currently underway.

The research was designed in two phases: first, a series of deliberative workshops and, second, a piece of quantitative research. This document reports on the results from both phases of research.

3.2 Research objectives

The overarching aim of the research was to understand audience behaviour and attitudes in relation to public service broadcasting and plurality. Beneath this topline aim there were a number of specific objectives, namely to understand:

- The perceived importance of public service broadcasting and the perceived performance of broadcasters in delivering it;
- Attitudes to the plurality of provision of public service broadcasting;
- Attitudes to new potential sources of funding for public service broadcasting in the future;
- The role of the internet in delivering the public service aims;
- The audience relationship with the public service broadcasters and the perceived value of the BBC.

3.3 Research methodology

It was decided that a two-stage methodology best suited the needs of the research:

- The first phase would explore, in depth, attitudes held on a broad range of issues relating to public service broadcasting and plurality. It would also seek to understand the reasons underpinning any stated views.
- The second phase would then take forward the key issues with a view to generating statistically robust findings.

With these needs in mind, deliberative workshops were judged the most appropriate methodology for the first phase of the research, to be followed by a large-scale, quantitative survey of a nationally representative sample in the second phase.

On one hand, deliberative workshops are an effective way of understanding people's judgments about issues of public policy and regulation. Participants can be addressed both as consumers – reflecting on their own preferences and needs – and as citizens thinking about the needs of others and the wider UK community. Deliberative research is also a good way to explore trade-offs between different scenarios. In this way, it is

possible to investigate normative questions about what should happen in the future as well as questions about aesthetics and consumer preferences.

Workshops are also interactive, meaning that difficult questions can be clarified and interviewers can probe on the reasoning behind people's views in ways that are not possible in quantitative research.

On the other hand, deliberative workshops are somewhat limited in their ability to cover a large, nationally representative sample and generate statistically significant findings. By combining them with a quantitative survey, it was hoped to form a comprehensive methodology.

3.3.1 The deliberative workshops

In this first phase research, the deliberative workshops ran for four hours per session. Six workshops were conducted, each comprising 20-22 participants, with the sample across all six workshops totalling 126. The workshops took place in Carmarthen, Coventry, Edinburgh, London, Manchester and Tiverton, over January and February 2008.

Participants were recruited with the aim of achieving, across the whole sample and as far as possible within each workshop, balance on the following key dimensions:

- Age
- Gender
- Socio-economic grade (SEG)
- Amount of TV watched
- TV platform
- Attitude to the BBC (so as to ensure the sample included those with a range of views towards the BBC)
- Internet access
- Ethnicity

Each participant completed a questionnaire in stages over the course of the workshop. Completion of the questionnaire was interspersed with discussion of the relevant themes.

Initially, participants filled in two sections on personal information and broad media consumption and ownership.

Then participants discussed the role of broadcasting and their attitudes to public service broadcasting in particular. This section also covered the general impression of the public service broadcasters and their delivery of the public service aims and characteristics, including awareness and usage of BBC services and the perceived value of the BBC.

In the next section participants discussed different genres of programming and the relative importance of these genres to them personally and to society overall.

From here the discussion moved to the internet and its performance in different content areas. Participants discussed the benefits and risks of the internet, its relevance to the public service aims and its potential role in delivering public service content.

Next the discussion focussed on the BBC. Awareness and usage of the different BBC services were covered before participants answered questions on the worth of the BBC, service by service. This section was positioned at this point of the workshop since, it was judged, participants were sufficiently acclimatised to the workshop that they were able to give considered answers but, importantly, had not yet been exposed to other parts of the discussion that had the potential to influence their responses.

Discussion of plurality followed. First, participants considered the importance of the potential outcomes flowing from plurality, the role played by different media players in delivering these outcomes and the importance of plurality in different genres.

Next participants considered plurality by exploring the pros and cons of four potential future peaktime television schedules from the public service broadcasters, each schedule illustrating a different mix of public service programming. Participants went on to address directly the future public service role of ITV1, Channel 4 and Five.

Finally, the discussion covered the different potential ways in which public service interventions could be funded in the future.

3.3.2 The quantitative survey

The quantitative study comprised a face-to-face and an online questionnaire survey, both using the same questions, conducted over the period 2-28 May 2008. The data from the two methods was merged to form a dataset comprising 4,577 16+ adults from across the UK (with 2,068 who had completed the survey face-to-face and 2,509 who answered it online). Quantitative fieldwork was carried out by Ipsos MORI, based on a questionnaire designed by Human Capital.

Both face-to-face and online samples were drawn to be representative of the UK adult population, aged 16+, as follows:

- Nation: England, Scotland, Wales, Northern Ireland (the sample was disproportionately stratified to boost the number of respondents in the devolved nations to allow for statistical analysis at a national level)
- Gender (within nation)
- Age: 16-24, 25-34, 35-54, over 55 (within nation)
- Social grade: AB, C1, C2DE (within nation, GB only)
- TV Platform: Terrestrial, Cable & Satellite, Freeview (for GB only)
- Ethnicity : white vs. non white (for GB only)
- Nine standard regions in England.

Once collected, the face-to-face and online data was merged and weighted to the following weighting scheme: seven English regions and Scotland, Wales and Northern Ireland interlocked with each of age, gender and social grade; ethnicity and working status. Because of the online boost, the weighting matrix also included frequency of internet usage. Because of the nations and online boost, after weighting the effective sample size was 2,417.

3.3.3 Interpretation of the data

Wherever it is available, the results charted are from the quantitative research. The deliberative research has been used primarily to shed light on why people hold certain views. In some cases, where quantitative data is not available, data collected in the

deliberative workshops has been included. Caution is required when studying these charts, however, as the sample size was small (see 3.3.1). Because of the relatively small deliberative sample size, data from the deliberative workshops has been shown in banded frequency charts that show the number of participants scoring within each band (rather than percentages).

3.3.4 Research instruments

The research instruments used in this study are included in the appendix of this report.

3.4 About Human Capital

Human Capital is an independent research, strategy and development consultancy, specialising in the media sector.

For more information, please see www.humancapital.co.uk

4 Attitudes to public service broadcasting

This part of the research set out to understand the role that broadcasting plays in the lives of the audience. It explored attitudes towards public service broadcasting generally and investigated views on the stated aims and characteristics of public service programming. Finally, the research considered views on the different programming genres.

4.1 The role of broadcasting

First of all, participants in the deliberative workshops were asked to talk unprompted about the role of broadcasting in their lives. The key observation here was that for almost all participants broadcasting was regarded as an important part of life today.

The impact is obviously huge – you are not going to get a bigger audience than those people who watch TV
Female - Coventry

A minority of workshop participants expressed resentment at the influence of broadcasting – and the media, in general – but accepted nonetheless that it was an inescapable reality.

It's appalling.... things are not shocking when you see it everyday on television
Female – London

It's a double edged sword – good and bad
Male – London

In general, three major themes emerged from the discussion of the role of broadcasting in the workshops (in order of frequency of mention):

- Broadcasting as a source of information: most participants mentioned that broadcasting was an important means of keeping in touch with the world – from a local level through to international affairs. News programming was most often mentioned, as well as current affairs programmes. A small minority said they no longer used the television or radio for news as they went to the internet or newspapers instead.

The lines of communication are the first thing people take over if there is a war or something – they get the message across TV and radio
Female – London

- Broadcasting as a source of learning: many participants spoke about broadcasting as a means of learning about things. Some pointed out that broadcasting was less effective for in-depth learning, but rather better at inspiring interest in a subject.

The way you get to learn ... is through the TV
Male - Coventry

- Broadcasting as a source of entertainment: most participants stated that broadcasting was their default source of entertainment and relaxation. They spoke about the ability of the television to take one's mind away from the daily routine. This function was highly valued by many participants.

(TV) is for light entertainment – you can turn it on and you don't have to think
Female - Coventry

Some also mentioned that broadcasting provided company. They described having the television or radio on at home and enjoying its presence in the background.

Many parents stated that they found the television a useful means of engaging their children. They liked the idea of programming that was, at once, both entertaining and educating.

TV brings up our children to a certain extent
Male - Tiverton

A very small number of workshop participants said that broadcasting was not important to them and that they would not miss it if it did not exist. However, most said they would not like to be without it.

Television was the principal broadcast platform that came to mind for most participants.

At the same time, radio was highly regarded by many participants, particularly valued for its ability to keep people in touch with their local communities and for its companionship.

Radio keeps me up to date with what's going on in Devon
Female - Tiverton

The radio... is always on
Male - Tiverton

4.2 The importance of public service broadcasting

Having discussed broadcasting in general, the notion of public service broadcasting was then introduced to the workshop participants. It was explained that, in the early days of TV and radio, it was recognised that broadcasting could have a profound influence on society and, as such, it was brought within the public sector as a force for good.

Workshop participants were told that today public service broadcasting refers to TV and radio programmes and services that are made for the benefit of society as a whole and not just to make money.

They were then asked to comment on the concept of public service broadcasting, what it means to them, and on the way it influences society.

Almost all of the workshop participants demonstrated a clear understanding of public service broadcasting, even if they were not familiar with the exact terminology. The key elements associated with PSB included (in order of frequency of mention):

- Keeping in touch with the news: by far, this was the aspect of public service broadcasting that most consistently struck a chord with participants. For most participants, broadcast news was the means by which they stay abreast of what is happening in the world around them. Within this context, the BBC was mentioned most often. In the minds of workshop participants, there was a very strong link between the news and the BBC.

Generally I watch the TV for the news
Male - Tiverton

*I have always admired Today on Radio 4 for challenging the
politicians*
Male - London

- Making the world a smaller place: many participants stated that broadcasting played a public service role in bringing into our homes experiences and information that would otherwise remain unknown or inaccessible. At the same time, some participants expressed unease at the way in which broadcasting can lead us to live vicarious lives.

*It's educational. Gives you the chance to see things you
wouldn't be able to afford to otherwise*
Male – Coventry

- Education: many participants recognised the power of broadcasting to enlighten and to shed new light on old subjects – generally, to teach us things. However, many participants also believed that broadcasting was particularly good at exciting interest and recognised the limits of the medium in conveying in-depth information. Some spoke about referring to sites on the internet to pursue subjects or stories in more detail.

I often watch something in the evening and learn something
Male - London

- Offering a window into other people's lives: many participants spoke about the role of the television in helping us to understand better ourselves and the world by showing us how other people live and navigate their way through the complexity of modern life.

*We live in a multi-national society in this country. The way
you get to learn about other nationalities is through TV*
Male - Coventry

- Providing common reference points: many participants understood the power of broadcasting to provide shared cultural frames of reference or even kick off national conversations and debate. It was noted that television still attracts bigger audiences than any other form of communication and has the capacity to draw people together. Participants described chatting about television programmes at work. The BBC's Question Time was mentioned as a forum for national debate on key issues of the day.

*TV and radio are seriously essential ... and give people who
wouldn't otherwise have things to talk about, common
ground*
Male - Tiverton

*I don't read newspapers. It is important for me to watch
things like the news and Question Time*
Female - Tiverton

- Acting as a catalyst for social change: some participants also suggested that broadcasting could help stimulate change in our attitudes and behaviour. For

example, Channel 4's Jamie Oliver and Hugh Fearnley-Whittingstall were mentioned for their campaigning in relation to food products. (The channel's season on food was airing around the time of the research.)

I haven't eaten chicken since those programmes
Male – Edinburgh

- Maintaining high standards across UK broadcasting: some participants felt that the presence of public service broadcasters, and in particular the BBC, in the UK meant that we have higher quality television overall.

I spent a year travelling around the States, and after a while I was gagging for some quality television, because it was all pap. (PSB) does protect the quality
Male - Tiverton

At the same time, a minority of the workshop participants felt that there was a potential downside to public service broadcasting:

- Some participants worried that “they” could abuse the power of broadcasting media to exert control over “us”. They were concerned about the decision-making processes which led to particular news agendas or editorial approaches. In this context, some advanced the notion that broadcasting should provide far more of a platform for the voices of viewers and ordinary people.

PSB depends on who is making it – it's a form of propaganda
Male - Tiverton

- Some participants felt that broadcast television, in particular, encouraged viewers to passivity, rather than to experience things for themselves.

...it does stop us doing other things
Male - Manchester

- Some participants stated that the television could have a detrimental effect on family life, as different members of the household can spend a lot of their time watching television rather than talking to each other.

Can cause problems in communication between the family
Female - Coventry

Overall, the workshop participants communicated their awareness that public service broadcasting faces much greater competition than used to be the case. At a high level, there are increasingly more (digital) media providers, services and platforms competing for consumer time alongside traditional broadcast media.

It has less (impact) now since the advent of Sky, etc.
Male - Manchester

Workshop participants also felt that the growth in take-up of multichannel television and the increase in the choice of channels had gone hand-in-hand with deterioration in the quality of programming on offer.

This led workshop participants to one of two conclusions:

- Most felt that the need for quality public service broadcasting was as strong, if not stronger, than ever – in order to provide a continuing source of quality content (typically associated with public service broadcasting) or to provide access to people who may not have the internet or multichannel television.
- On the other hand, a minority felt that the need was weakening in the face of the massive amount of choice now offered by multichannel television.

4.3 Responsibility for public service broadcasting

Participants in the workshops were asked to suggest, unprompted, which broadcasters and individual services they thought had responsibility for public service broadcasting. The question was interpreted in two main ways:

- Most participants approached the question thinking about *legal* responsibility. The vast majority of these felt that the BBC was the main deliverer of public service broadcasting. In total, 105 out of 126 workshop participants mentioned the BBC one way or another. In this context, a wide range of television and radio services were cited, as well as the BBC's online service to a lesser extent.

It's the BBC basically. That's what it means to me
Male - Manchester

In a second group came ITV, cited by about one-third of participants, followed by Channel 4 and Sky. (Whilst some participants mentioned specific Sky *channels* – predominantly Sky News – others referred to the Sky *platform*, not necessarily those channels operated by Sky.) This group also included local commercial radio.

In a third group, further behind, a small number of participants mentioned Five. In addition, a few specialist channels – such as Discovery and The History Channel – were mentioned by one or two participants.

- The second interpretation of the question was in terms of *moral* responsibility. Some participants felt that all channels shared responsibility for maintaining standards in accuracy, taste and decency. There was a widespread feeling amongst most participants that standards have been in decline over recent years.

All broadcasters should have a moral responsibility to be factually correct
Female - Tiverton

4.4 Attitudes to the public service aims

In the deliberative workshops, stimulus was used to explain who the current public service broadcasters are, how they are funded and the extent of their statutory public service obligations.

Participants were then invited to comment on the importance to society of six core public service aims – based on Ofcom's PSB purposes:

- To increase our understanding of the world through news, information and analysis of current events and ideas
- To get people interested in arts, science and history and other factual topics
- To encourage people to learn
- To bring everybody together for shared experiences – for example, on big national occasions like the World Cup
- To make us aware of other cultures and points of view
- To celebrate UK culture and stories in areas such as drama, comedy, music and arts³

The workshop participants widely grasped the relevance of these aims to the earlier discussion of public service broadcasting, talking most readily about “understanding the world” and “learning”. In fact, all of the aims received relatively high levels of support and the data obtained from the quantitative research confirms this. (Figure 1.)

In line with the workshop participants’ earlier unprompted responses to public service broadcasting, the first of the aims (“understanding the world”) was thought to be the most important. Almost all workshop participants believed that the provision of news, information or current affairs was the cornerstone of the concept. This was borne out in the quantitative research, which showed that 70% gave “understanding the world” a score of at least 8 out of 10 (the highest scoring of all the prompted aims).

Most participants in the deliberative workshops also considered “learning” to be important; the television was seen as an effective way of educating people. However, there was a minority who believed that relaxation and entertainment were more relevant to television than education. Respondents in the quantitative research rated “learning” the second most important aim, with 67% scoring it at least 8 out of 10.

*It is almost impossible to watch TV and not learn something
– even if it is just EastEnders
Female – Tiverton*

*I tend to use TV as something to relax and entertain. The
education system is there to encourage people to learn
Male- Coventry*

In the deliberative workshops, “shared experiences” was considered relatively less important. Whilst some participants appreciated the role played by the television at key moments like Princess Diana’s funeral, others said that this aim was relatively unimportant, since they believed that people should experience the world and each other first hand and not by proxy through the television. The quantitative research showed a similar result with a comparatively low 54% rating it 8 or more out of 10.

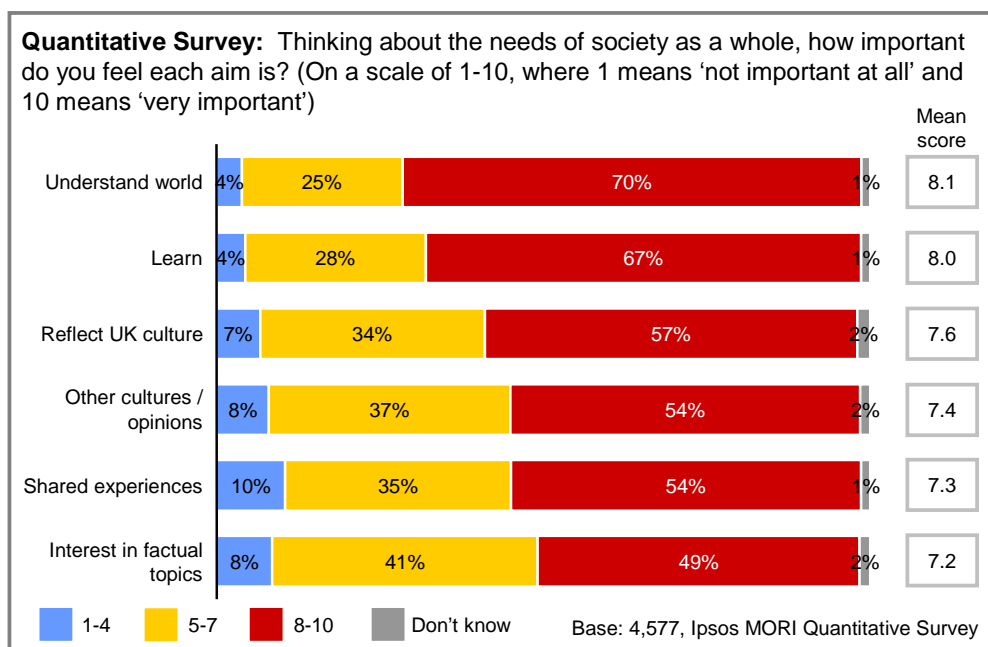
*Big fundraising concerts and Diana moments help with our
feeling of unity
Male – Coventry*

³ Please note that in the quantitative research, this aim was asked as “To reflect life in the UK and UK culture”

There are nicer ways to bring people together than through TV
 Female- Tiverton

Workshop participants also said that there were many better ways of promoting the arts than by television, for example, art galleries and museums. In the deliberative workshops, this aim was generally felt to be less important than most of the others and the quantitative research supported this finding. Nevertheless nearly half (49%) of quantitative respondents scored it at least 8 out of 10 – underlining that all of the aims were considered important.

Figure 1: The importance of the public service aims



In an analysis of the quantitative survey data, the main observations in relation to demographic subgroups included:

- Those with internet / broadband access generally placed greater importance on the aims than those without;
- ABC1 respondents aged 35+ considered understanding the world and promotion of the arts and other factual subjects relatively important;
- Younger (16-24) and C2DE respondents considered shared experiences relatively important;
- Otherwise the data was fairly flat by gender, nation / region, television platform and ethnicity.

4.5 Attitudes to the public service characteristics

All those involved in the research were asked for their opinion on the following characteristics of public service broadcasting:

- To provide programmes / content made in the UK⁴
- To provide programmes / content about the different regions of the UK
- To provide well made, high quality programmes / content
- To provide entertaining programmes / content
- To be fair, balanced and not take sides
- To be trustworthy
- To provide programmes / content that have fresh ideas and try different approaches
- To provide programmes / content that make people think
- To provide programmes / content that are engaging and that people want to watch, listen to, or use

In the workshops, there was a widespread belief and expectation that good quality programming should naturally seek to embody as many of these characteristics as possible. The quantitative research confirmed this with around three-fifths (or more) of respondents scoring each of the characteristics at least 8 out of 10. (Figure 2.)

All of these things are pretty important
Male - Coventry

Whilst not stated Ofcom PSB characteristics, ‘showing programmes about the different regions of the UK’, ‘fair and balanced’ and ‘to be trustworthy’ were also included to make the research as comprehensive as possible. Of all the probed characteristics, trustworthiness was felt to be most important in both the deliberative workshops and the quantitative research. Perhaps surprisingly, however, given the amount of media attention generated around the issues of trust in recent months, the topic did not dominate discussions: for most workshop participants, trust as a news item appeared to have subsided.

You are going to so many millions of people it is very important to be unbiased and trustworthy
Female - Coventry

Feel strongly that the [PSBs] should be monitoring unsuitable content, and not rely on sensationalism to sell programmes
Female - Tiverton

The ranking of the other characteristics was broadly the same in the deliberative and quantitative research, although deliberative participants placed slightly more importance on “balance” than quantitative respondents. In discussion, the issue of balance and impartiality in television news reporting divided deliberative participants to an extent:

- Most talked of the need for fair representation of the range of views on subjects. They felt that television should take a stance above politics, unlike newspapers that tend to be explicitly partisan.

⁴ In the quantitative research, this characteristic was asked as “To show programmes that reflect life in the UK”

- A minority stated that they would accept, or even be keen for, television companies to take a particular viewpoint, as long as it this viewpoint was made clear and transparent, and that there was a balance of views across the channels.

*You want to know the news is factual and not someone's
opinion*
Male – London

*It is OK not to be impartial...as long as you give the other
side a voice*
Male – Edinburgh

Many deliberative participants made the point that unless programming was engaging and entertaining, everything else would count for nothing because nobody would watch it. The quantitative research showed that almost three-quarters (73%) of respondents scored both these characteristics at 8 or above.

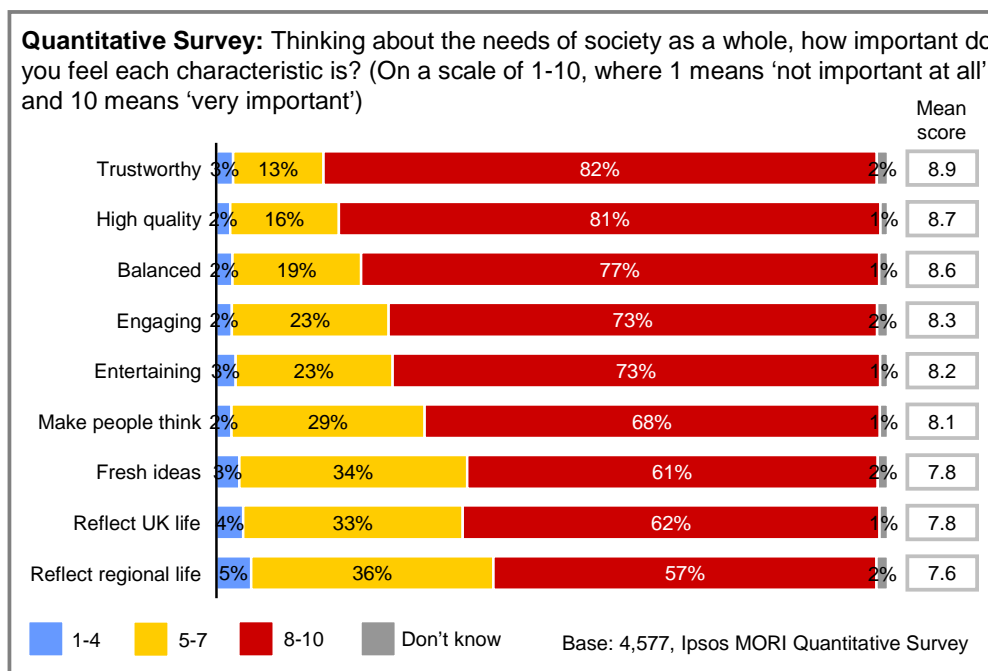
*If programmes are not engaging it does not matter if they do
the other things because there will be no-one to watch it*
Female - Manchester

In the workshops, “made in the UK” was included as one of the characteristics. Generally it was considered relatively less important than the other characteristics, with some workshop participants stating they were more concerned about the quality of a programme than its provenance. To this end, they cited several US dramas like Desperate Housewives and Heroes. However, in a later question, when assessing programming genres in terms of their importance to participants personally and to society as a whole, programmes with a non-UK origin were deemed relatively unimportant. (See next section.)

It doesn't matter where it is made, as long as it is good
Male - Tiverton

In the quantitative research the emphasis in this characteristic was changed slightly to make it more about the reflection of life in the UK and less about the UK as the place of production. In line with the deliberative findings, both this characteristic and the reflection of the different regions of the UK characteristic were rated less important than most of the other characteristics. Again, however, about three-fifths of respondents gave each a score of at least 8 out of 10. (See next section.)

Figure 2: The importance of the public service characteristics



In an analysis of the quantitative survey data, the main observations in relation to demographic subgroups included:

- Younger (16-34) respondents generally gave the public service characteristics lower scores than older respondents, apart from the entertaining and fresh ideas characteristics;
- Similarly, those with internet / broadband access generally gave higher scores than those without;
- Those in multichannel homes tended to give higher scores than those in terrestrial-only homes;
- Programming about the different regions of the UK was considered particularly important by older respondents and those in the south-west. Across the nations this characteristic was fairly flat;
- The characteristics were fairly flat on SEG, gender, and ethnicity.

4.6 Attitudes to different genres of programming

In this section of the research, the deliberative workshop participants were asked to consider a list of different programming genres and score each one in terms of, first, its importance to them personally and, second, its importance to the overall aims of public service broadcasting for society as a whole. To assist with their understanding of the categories, participants were given programme examples in each genre.

Overall, workshop participants felt it was important to have a range of different types of content available in order to deliver the public service aims effectively.

In order to fulfil the aims of PSB most of the programmes are important – you couldn't watch one and fulfil all the aims

Female - Coventry

News, regional news and current affairs were the most important genres for the aims of society – and personally. (Figures 3 and 4.) This reflected comments made in discussion. In the Manchester and Edinburgh workshops participants particularly stressed the importance of regional news to keep them up to date with things locally.

You want to know what's happening on your doorstep, and not just in London

Female - Manchester

Thinking about themselves personally, children's came bottom of the list. Not surprisingly, this genre was more important to parents than it was to non-parents, rising three places. Similarly, education performed far better amongst parents than non-parents, rising six places.

In contrast, in terms of societal importance, participants were clearly placing greater emphasis on the needs of children and the wider community, even if they did not have children themselves: education ranked 4th in terms of societal importance, compared to 15th for personal importance, and children's programming ranked 7th for societal importance compared to 17th (last place) for personal importance.

Figure 3: Personal importance of programming genres

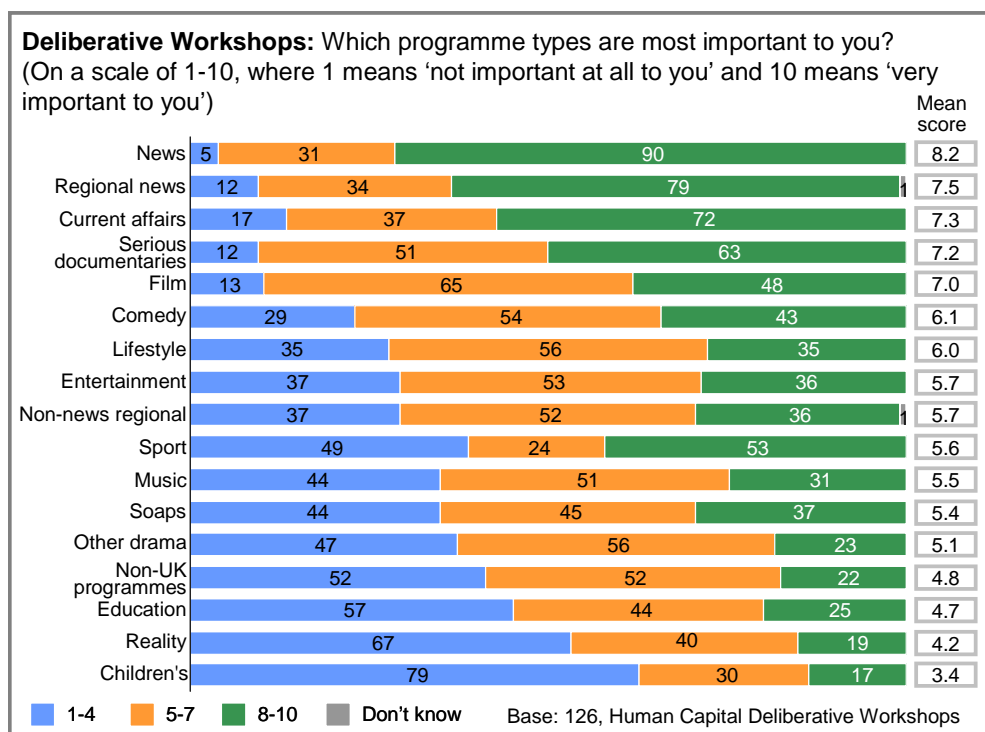
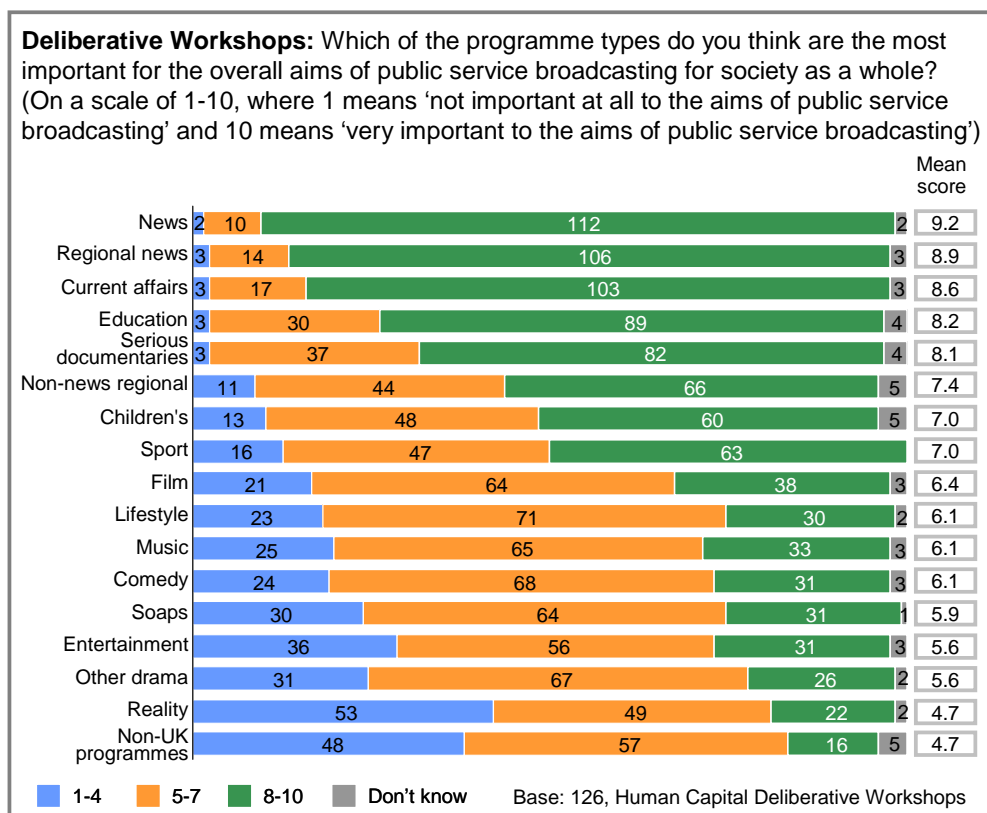
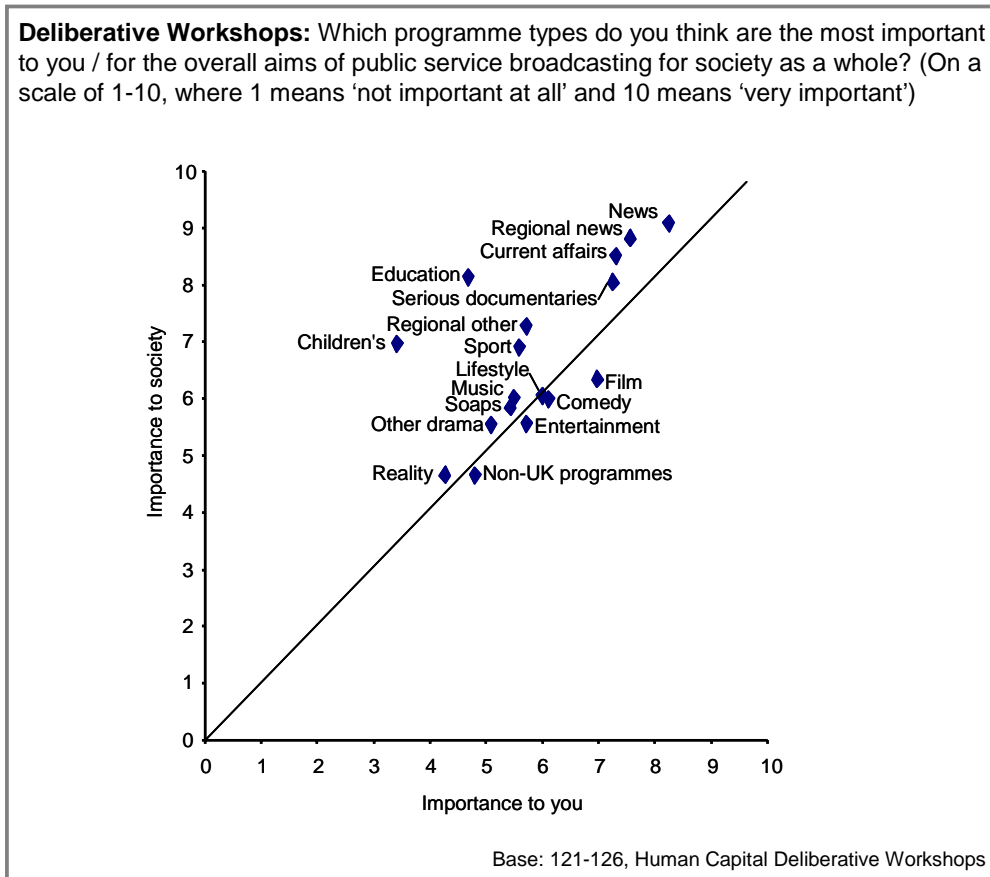


Figure 4: Importance to society of programming genres



The relationship between views on personal and society importance is illustrated in Figure 5, which plots mean scores. Genres above the line were perceived to be more important to society than to participants themselves. Children's and education are well above the line, along with news, regional news, current affairs and serious documentaries.

Figure 5: importance of genres, personal versus society perspective



5 Delivery of public service broadcasting

The purpose of this section of the research was to explore impressions of the public service broadcasters and perceptions of their effectiveness in delivering the public service aims. The deliberative research also looked at the role of the internet.

5.1 Impressions of the public service broadcasters

Almost all of the deliberative workshop participants regarded the BBC differently from the other public service broadcasters. There was fairly widespread appreciation of the link between the audience and the BBC via the Licence Fee, and this engendered high expectations.

The BBC needs to produce high quality programmes to back up the Licence Fee
Male - Edinburgh

I have higher expectations of the BBC
Female - London

Many felt that the BBC was an integral part of the establishment and perceived the organisation as an authority figure, unlike the other broadcasters. Most felt that the BBC had the strongest heritage and the biggest brand – both inside and outside the UK.

The BBC is quite institutionalised in that we have all grown up with it
Male - London

The BBC and its brand values were perceived to embody both strengths and weaknesses. The strengths included (in order of frequency of mention):

- Impartiality and trusted guide: most participants expressed a clear view that the BBC was a trusted guide, particularly in relation to news.

People tend to trust the BBC more than other programmes
Male - Manchester

- Freedom from advertising and commercial influence: many participants enjoyed the fact that the BBC did not bombard viewers with advertisements. They said it was a welcome respite from the commerciality that can characterise elements of life today.

[It's] important to stay as non-commercial as possible... this is an essential part (of the BBC)
Male - Edinburgh

- Expectation of something for everyone: participants generally had greater expectations of the BBC than of other broadcasters. They believe it is bigger, with a broader range of services.

There is more to access from the BBC...It's not just TV
Male - Manchester

- Authority: many participants felt that the BBC was grown-up and serious and reported that, as they had grown up, so they had switched allegiance from other channels to the more “adult” BBC.

*If I want to watch something light-hearted my first choice
would not be the BBC...It's more factual*
Female – London

- Worldwide reputation: there was a feeling that the BBC plays an ambassadorial role overseas

People have heard of the BBC all over the world
Male - Coventry

Most workshop participants also believed that the BBC had some weaknesses. In particular, some thought that the BBC was becoming increasingly drawn into having to compete with other broadcasters and, in so doing, was compromising the quality of its output.

*(Quality) is slipping now. It's about ratings chasing, and it
shouldn't be*
Male - London

The BBC's status as a serious, trusted guide also meant that the BBC was widely perceived as risk-averse and not innovative enough. Some participants said that the BBC could be somewhat staid in its approach to programming, with too many tried and tested formats.

*The BBC are very safe. They can not afford to be
controversial*
Male - London

In addition, a small minority in the workshops questioned the political independence of the BBC. They questioned whether it was possible for the BBC to be both independent and part of the establishment.

The quantitative data confirmed findings from the deliberative workshops, with the BBC achieving the best impression amongst respondents. Nearly half (45%) gave a score of at least 8 out of 10. (Figure 6.)

Both the deliberative participants and the quantitative respondents grouped ITV1 and Channel 4 in a second tier after the BBC, with Five further behind. Many workshop participants, particularly in Manchester, had a lot of affection for ITV1 and considered it a very valuable part of the broadcasting ecology. They particularly appreciated its regional strengths.

*ITV1 is miles better than the others, way more entertaining
than elsewhere and more choice*
Male - Manchester

At the same time, expectations of ITV were generally lower (than of the BBC), since workshop participants perceived that ITV provided a smaller range of services and a more limited public service offering (reflecting the extent of its PSB obligations).

If you compare what the BBC is doing to the other ones [ITV, Channel 4 and Five], they are doing much less
Female – Coventry

Channel 4 was seen as edgy, innovative and often thought-provoking. Participants in the deliberative cited several Channel 4 dramas, like *Shameless* and *Queer as Folk*, for their different approach. They liked many of Channel 4's documentary strands like *Dispatches*, again for their new perspective on old subjects. They talked about the campaigning programming associated with personalities like Jamie Oliver.

(Channel 4) have programmes that no-one else would show like Shameless, and go against the grain
Female – Manchester

Channel 4 is a bit more radical... Like the Jamie Oliver thing, when they see him processing the food, it makes you take a step back
Male – Edinburgh

The flipside of this impression was that Channel 4 was often seen to court controversy. In addition, some participants thought the channel relied too heavily on reality programming.

Channel 4...import quite a lot of stuff from abroad, whereas the BBC makes more of its content... they also do a lot of reality
Male - London

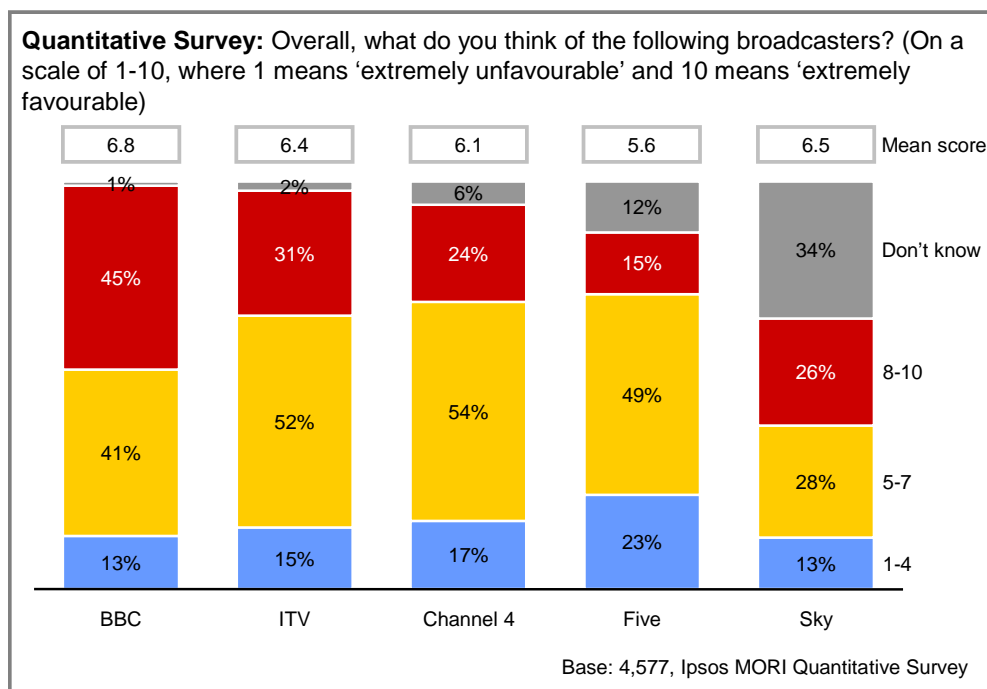
In line with the deliberative workshops, ITV and Channel 4 scored less well than the BBC in the quantitative research in terms of general impression: about one-third of respondents gave a score of at least 8 out of 10 for ITV, and one-quarter for Channel 4 (31% and 24% respectively). (The figure for the BBC was 45%). Nevertheless, about half of the respondents scored them at least 7 out of 10 (51% and 44% respectively).

Amongst workshop participants, Five was noted for its high level of quality imported programming and the provision of news. In the quantitative research, 15% of respondents gave a score of 8 or more.

They do good US programmes
Female - London

The quantitative work asked respondents for their general impression of Sky in addition to the main public service broadcasters. In total, 26% scored it 8 or more out of 10 and it achieved a mean score of 6.5. Amongst Sky households, 52% scored 8 or more and the mean score was 7.3.

Figure 6: General impression of the public service broadcaster organisations



5.2 Delivery of the public service aims

In both the deliberative workshops and the quantitative survey, the BBC was seen to be most effective in delivering the public service aims, reflecting the general impression that participants had of the different public service broadcasters. This view may also have been a reflection of the fact that the BBC has the most wide-ranging public service obligations.

Figure 7 shows that in the quantitative survey, ITV and Channel 4 performed reasonably well in terms of the mean score, but compared with the BBC, fewer quantitative respondents gave these broadcasters 8 or more out of 10. As seen in the general impression of these broadcasters, however, about half of the participants rated ITV and Channel 4 at least 7 out of 10 (52% and 49% respectively).

Five received the lowest scores in the survey in terms of its delivery of public service aims, perhaps reflecting the fact that the channel has the least extensive PSB obligations. Among some deliberative participants, however, there was a somewhat greater appreciation of the range of programming offered by the channel, including news and, to a lesser extent, children's programming.

I would miss news on Five
Female – London

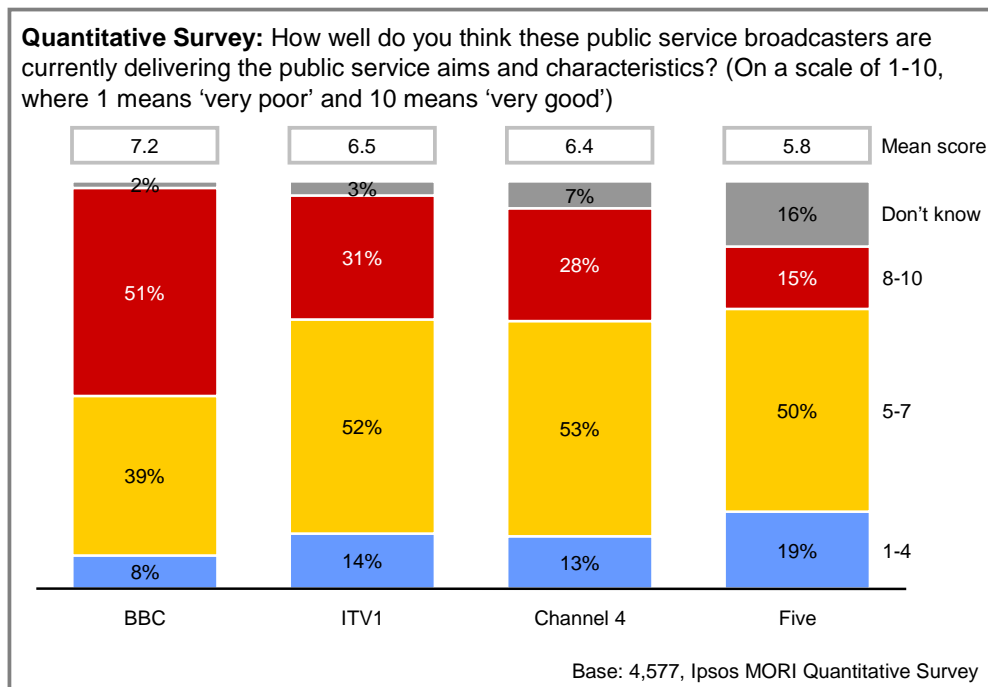
Notwithstanding these views on specific organisations, in the deliberative discussions there was a widespread perception that the main broadcasters are facing challenges in delivering their stated public service aims. Many participants felt that, with the number of channels rising, these broadcasters were becoming increasingly drawn into competing with other broadcasters and offering derivative, copycat programming.

In other words, generally, the public service aims and characteristics were becoming increasingly testing – though, for most, no less important – ideals in an ever more competitive environment.

Some of them are quite big ideals and I am not sure the broadcasters often achieve them

Male - Coventry

Figure 7: Effectiveness of delivery of the public service aims



5.3 The role of other channels in delivering the public service aims

In the deliberative workshops, participants were invited to mention (unprompted) any other channels they thought were delivering the public service aims. Sky was cited most often, with 20 out of 126 participants mentioning Sky News, Sky Sports or Sky One. Some mentioned Sky in a more ambiguous sense, talking about the Sky platform. In some cases they were referring to programming that had actually been originated by public service broadcasters.

Discovery, the History Channel, UKTV, CNN, National Geographic and local commercial radio were all also mentioned in the deliberative research, by fewer participants. In relation to these TV channels, some participants had first-hand experience, whilst others based their view on the reputation of the channels.

It was often mentioned that no one specialist channel could deliver the aims in the same way as the mixed-genre schedules of the PSBs, but when considered together they worked like a portfolio.

You can't compare a specialist channel against something that is trying to be diverse. You can't compare BBC ONE against the History Channel
Male - Tiverton

5.4 The role of the internet

Participants in the deliberative workshops were asked about their views on the internet in relation to the public service aims.

For most workshop participants, the internet was seen primarily as a functional tool – for example, for communicating, finding information (including the news) and shopping. Social networking was also mentioned as an important aspect of the internet by some of the younger participants.

Convenience, control and immediacy were widely thought to be the major benefits of the internet – and extremely important. Other perceived benefits included the breadth and depth of content available; opportunities for interactivity; and the opportunity for free expression of opinion.

The internet is very easy – you type in what you want to know and you get it
Female - Tiverton

Most internet-using-participants did not yet regard the internet as a source of long-form audio-visual content on a par with the television, even though they typically used it to watch video clips. Accordingly, interest in using the internet to access television or radio programmes was generally fairly low, although (albeit based on the relatively small deliberative sample size) slightly higher amongst younger users. (It should be noted, however, that the deliberative groups took place in January and early February 2008 when BBC iPlayer had only just been launched.)

There are physical ramifications of sitting at a screen compared to relaxing in a living room... I find my posture is different in front of my computer...
Female - Tiverton

Awareness of the risks of the internet was high (as well as of the benefits). The main concern was the risk of inappropriate content in relation to the young. Some participants also worried about the risk of security breaches and the potential for hardware and / or software to become damaged. Finally, some participants believed there was a risk that some sections of the population – particularly older people, without access to the internet – were getting left behind.

For all these reasons, most participants did not associate the internet with the public service aims.

I think it is good, but I don't think we should be dependent on it. It's not run with these sorts of public responsibilities in mind
Male – Tiverton

With prompting, Wikipedia, Google, bbc.co.uk, NHS Direct and YouTube were the websites that felt most relevant to the public service aims.

(YouTube) delivers something you would never normally see... because a TV programme would not make enough money
Male – London

Upon further reflection, some participants suggested that the risky nature of the internet heightened the need for a safe public service zone. Indeed, some saw an opportunity for the BBC to consolidate its position as a trusted guide on the internet.

More of a remit for PSB from the BBC on the internet because they can say that their sites are safe
Male - Edinburgh

Deliberative participants were asked how well they thought the internet performed (in terms of quality and availability) in different content areas. A significant number of participants did not feel able to comment on this question – either because they did not have internet access or because they felt insufficiently informed. Amongst those participants who did contribute to the discussion, the internet was perceived to be reasonably effective across a range of content areas, although some variation emerged.

News, music and sport were considered to be the content areas where the internet was most effective, with many participants stating that they use the internet to pursue news stories in more detail or to cross reference facts.

Can get a far broader band of opinions from the internet though news forums and things like that
Male – Carmarthen

Comedy and discussion emerged as the content areas least effectively covered by the internet. To an extent these views were a reflection of the way in which participants used the internet. That is to say that participants generally were not active bloggers or users of discussion forums and, similarly, use of the internet to access comedy content was fairly low.

6 Attitudes to plurality

The purpose of this section was to explore attitudes to the plurality of provision of content in line with the public service aims.

The research explored attitudes to some potential outcomes that could result from plurality of provision and the importance of plurality across different genres. It went on to investigate views on the future role of ITV1, Channel 4 and Five and the question of supporting these broadcasters with public money.

In the deliberative workshops, participants also discussed the roles of different players in contributing to the plurality outcomes. The research was designed to understand views on plurality across all providers in the market, not only the public service broadcasters. Participants explored plurality from the point of view of four possible future television schedules from the main channels, trading-off the pros and cons of each.

6.1 The importance of plurality outcomes

Participants in the deliberative workshops were asked to consider a number of outcomes that potentially result from the existence of other providers, besides the BBC, delivering programming in line with the public service aims. The research was designed to understand views on plurality across all providers in the market, not only the public service broadcasters. These prompted outcomes included:

- A choice of high quality and fresh programming;
- Access to a diverse range of views;
- Different editorial approaches;
- A range of UK – and regional – programming.

Generally all these outcomes were thought to be important. Many workshop participants instinctively felt that having multiple providers created a competitive situation and that this was beneficial since it helped to drive up quality and choice.

Competition is always healthy
Male – London

Across the four probed outcomes, choice of high quality and fresh programming emerged clearly as the most important.

*[Choice] gives you more quirky angles, it's a free market,
and the best ones come to the top*
Female – Tiverton

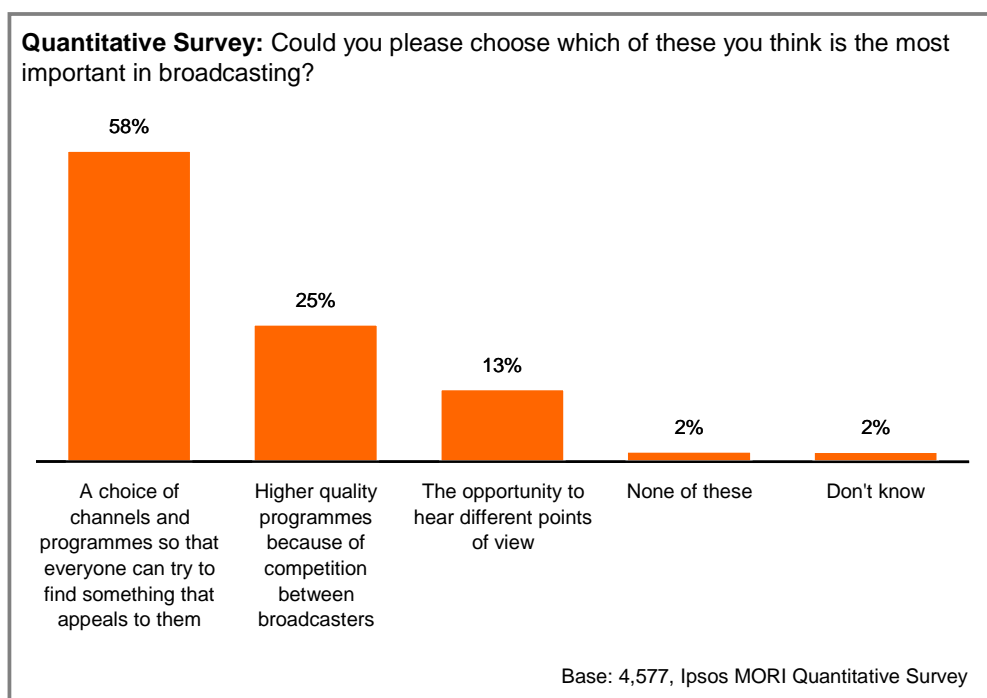
Reflecting the earlier discussion, having access to a range of UK programming was considered relatively less important, although over half the deliberative participants still scored this at least 8 out of 10.

In the quantitative survey, respondents were asked to choose the one plurality outcome that they considered most important, from a list that disaggregated choice and quality:

- The opportunity to hear different points of view;
- A choice of channels and programmes so that everyone can try to find something that appeals to them;
- Higher quality programmes because of competition between broadcasters;
- None of these

The most popular was a choice of channels and programming, which 58% said was the most important outcome. (Figure 8.)

Figure 8 Importance of the outcomes of plurality



In the analysis of the quantitative data, the main observations within the demographic subgroups were these:

- The young and CD2Es tended to be more interested in a choice of channels, as were those in Wales;
- Older respondents and ABC1s were more interested in higher quality programmes;
- Those in non-white homes and in London were particularly interested in access to different points of view.

6.2 Contribution of different players to the plurality outcomes

Workshop participants were asked for their views on the roles of different media players in contributing to the plurality outcomes. (Figure 9.)

They particularly mentioned that the BBC offered the greatest spectrum of services and that it performed especially well on choice. They associated the BBC very strongly with the provision of trusted, impartial news and believed that, as long as there is balance overall, this is consistent with the BBC offering a range of different views.

ITV1 was perceived to be the big mainstream competitor to the BBC. Participants had an expectation that ITV1 should offer a reasonably wide range of programming – choice – and had a clear grasp of ITV1's regional strengths. This resulted in a relatively high score for ITV1's contribution to a range of UK – and regional – programming.

In line with the views expressed in relation to the general impression of Channel 4, many participants mentioned that Channel 4 made a very positive contribution to the range of editorial approaches on offer. Dramas and documentaries were cited by many participants in support of this view.

*Channel 4 make quite fresh, alternative programmes like
Skins
Male – Coventry*

Some participants also felt that Channel 4 played an important role in extending the range of views available, for instance via Channel 4 News. They recognised that it often took a distinctive editorial line, with greater time devoted to different types of interviewees.

Generally, the views expressed at this stage of the discussion were consistent with (and perhaps informed by) the comments made earlier in relation to participant impressions of the broadcasters and their brand values (see section 5.1).

*Channel 4 (News) tends to tell you things in a more
interesting way than the BBC
Male – Manchester*

Beyond the main public service broadcasters, the digital channels and other (non-broadcast) media players were also perceived to make a considerable contribution to the plurality outcomes.

In particular, the digital channels, taken together, were seen to make a valuable contribution to the variety of programming approaches available, even if individual channels did not. Some participants said that the range of digital channels available on the Sky platform worked like a portfolio similar to the BBC's portfolio of channels. For this reason, other digital channels scored relatively well on different approaches to programming.

*All channels are relevant to PSB, just in different ways. Sky
and Virgin cover all bases as a package
Male - London*

Non-broadcast media also scored highly. Many participants pointed at the diversity of views offered by newspapers and the internet, while a few also mentioned Teletext and magazines.

There was a broad understanding that, whilst television channels have a duty to present balanced news bulletins, giving fair representation to all sides of key debates, newspapers and websites typically offer content from the point of view of particular political orientations. Taken as a whole, participants believed that they contribute a very wide

range of views. Participants reflected this understanding in their quantitative assessment, giving other media (alongside the BBC) the joint highest score for the range of views.

*Newspapers are all biased towards some sort of political
party*

Male - Carmarthen

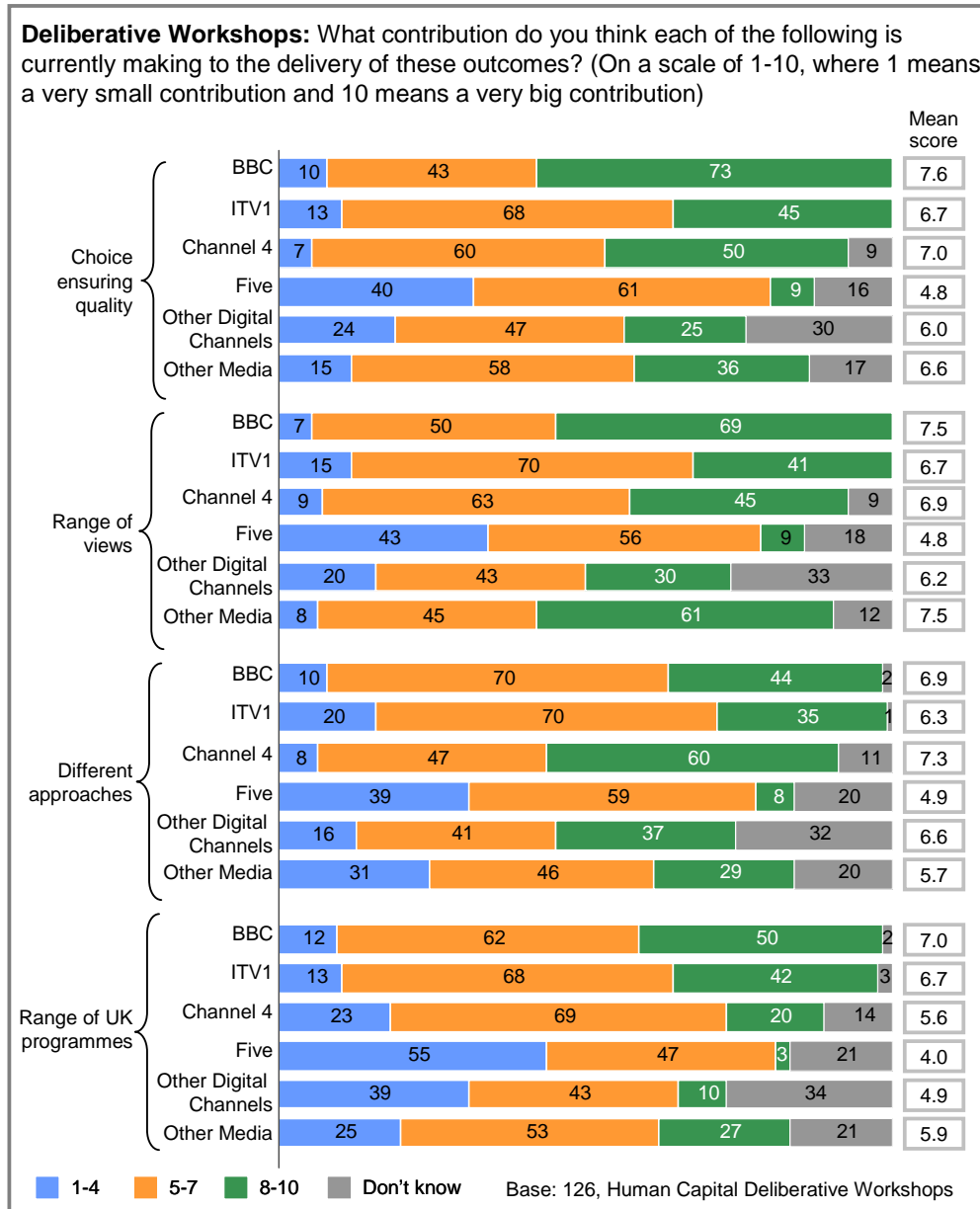
In addition to the range of *editorial* views put forward by different newspapers and internet sites, some participants also pointed at the range of views expressed by *users* by means of discussion forums hosted on websites.

*Get diversity on the internet through interactive contribution
from readers*

Male - London

Finally, some participants mentioned the role of (local) newspapers and websites in providing content about different areas of the UK. For this reason, other media scored relatively well on the range of UK / regional content.

Figure 9 Contribution of media players to the plurality outcomes



6.3 Importance of plurality of PSB provision across genres

Participants in the deliberative research were asked to score genres according to the extent to which they felt the genre required plurality of provision.

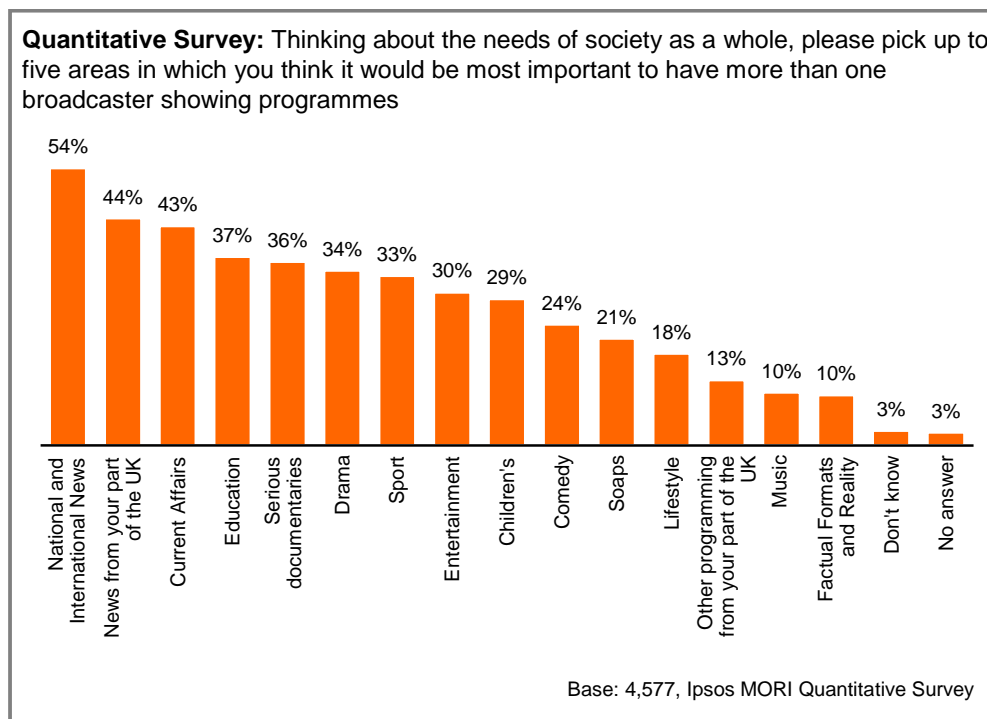
In line with their earlier comments, they generally felt that plurality was important across the board, although some variation in importance was seen across genres.

Plurality of provision was considered most important in news, serious documentaries and regional news. It was considered relatively less important in soaps, lifestyle, acquisitions and reality.

These findings were broadly supported by the quantitative research. (Figure 10.) This asked respondents to pick up to five genres in which they thought it would be important to have plural provision, bearing in mind that having more than one broadcaster showing these programmes with public service aims could require up to the equivalent of £15 per household per year in public funding for ITV1, Channel 4 or Five.

Similar to the deliberative findings, the most popular choices from the quantitative survey were news (54%), followed by regional news, current affairs, education, serious documentaries and drama.

Figure 10: The importance of plurality of PSB provision across genres



6.4 Attitudes to alternative peak time weekday schedules

Workshop participants were also asked to consider four alternative peak time weekday television schedules from the main network channels. This part of the research was designed to approach the issue of plurality from a more practical – and familiar – point of view: namely, by means of discussion around representative television schedules with varying mixes of public service programming from the different broadcasters.

The four schedules (presented as A, B, C and D and not using the more descriptive names shown here) were:

- 'Current mix of PSB': this was designed to illustrate a rich mix of programming within single channels and across broadcasters, broadly similar to today's offer and incorporating drama, entertainment, comedy, news, current affairs and factual programming;
- 'More commercially attractive': this was designed to illustrate a commercial world with no public service intervention – the schedule skewed towards more commercial genres on the commercial broadcasters, with less emphasis on

delivery of current affairs and factual programming; no change to BBC One or BBC Two;

- ‘Mid-way’: on this schedule, the offering on the commercial channels was positioned half way between the ‘Current mix of PSB’ and the ‘More commercially attractive’ schedules; again, no change to BBC One or BBC Two;
- ‘Less commercially attractive’: this was designed to illustrate an increased investment in less commercially attractive, narrowly focused PSB with a greater concentration of factual and current affairs programming – both from the commercial broadcasters and from the BBC.

In order to communicate effectively what was meant by the different types or genres of programming, the alternative schedules included illustrative programme titles. However, the research sought to focus on the genres rather than on specific programmes. To this end, the schedule stimulus colour-coded each genre – for example, serious documentary in orange, entertainment in pink, children’s in dark blue.

Before discussion of the relative merits of the alternative schedules, the first part of the exercise involved discussions where workshop participants identified the difference between the genres as well as the key genre differences between the schedules. Indeed, all of the discussion in this part of the research was couched in terms of genres and avoided reference to specific programmes. The visual impact of the schedule stimulus was effective in this regard.

After discussion of the schedules, participants were asked to rank them thinking about themselves personally and society as a whole. Then, participants were asked to rank the schedules again, this time taking account of the likely costs that would be associated with each schedule in five years’ time – see the more detailed description of costs below.

Participants quickly grasped the difference between the four variant schedules without prompting.

When asked to explore the trade-offs between the four alternative schedules – thinking about their personal preferences and before costs were introduced – the ‘Current mix of PSB’ schedule emerged as the most popular with participants. (Figure 11.)

Just under half ranked it as their first choice for themselves personally. They liked the variety of programming on offer from individual channels and also the choice available at any one time across channels. For many participants, it was important for all the main broadcasters to offer national news. They also recognised (unprompted) that this schedule was close to today’s schedules.

*Seems to be like a genuine programme schedule for a night
in
Male – Carmarthen*

*People would struggle not to find something they like...
represents most people’s ideal watching
Female - Coventry*

Some liked the ‘More commercially attractive’ schedule, because it offered more opportunities for relaxation and escapism. Some younger participants also appreciated the greater amount of acquired programming on offer.

More American shows which I like
Male – Coventry

On the other hand, many participants felt it was too light-hearted, offering lower quality programming than the other schedules. The omission of regional news on ITV1 was unpopular.

Going down the route of Sky
Male – Coventry

Lack of quality, or possibly expensive programmes, that the BBC would plough money into. The commercial channels, ITV and Five, are doing cheaper things that don't have the quality.
Female - Tiverton

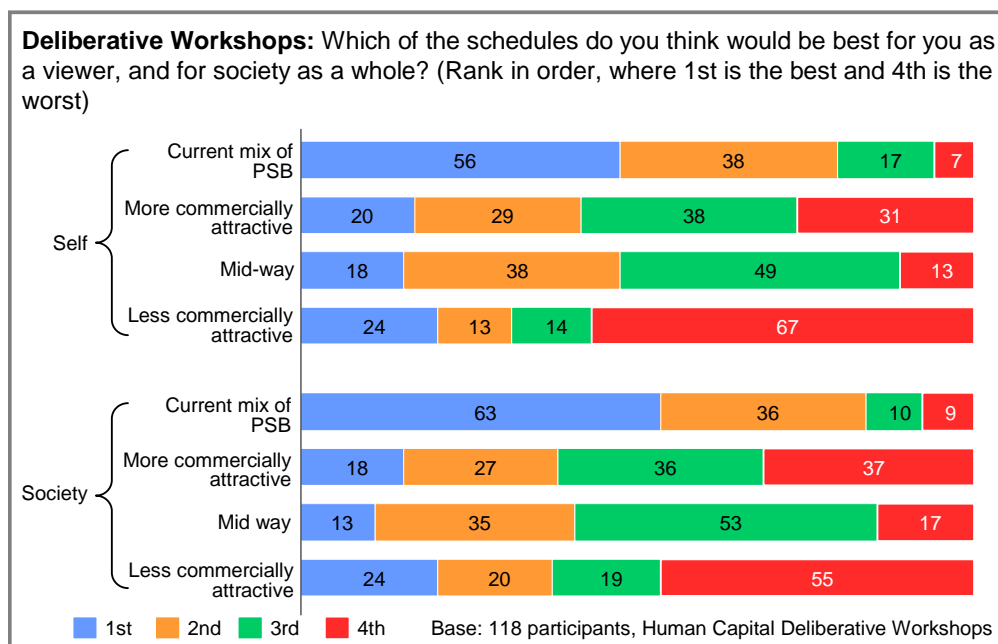
The 'Mid-way' schedule attracted fewest first preferences. As regards to ITV1's regional programming on this schedule (larger regions and fewer stories), there was generally a feeling that larger regions would make the regional news less relevant.

The 'Less commercially attractive' schedule polarised participants. Some welcomed its rather more serious tone and the inclusion of more children's programming, but for most, overall, it seemed far too heavy and boring. Some missed the acquired programming and many participants said they would miss the soaps on BBC One.

I can't have no EastEnders
Female – London

When participants were asked to carry out the same ranking exercise thinking about society as whole, a broadly similar overall pattern emerged. Before costs were introduced, the 'Current mix of PSB' was the most popular schedule (even more popular than in the personal rankings), while the narrower 'More commercially attractive' and 'Less commercially attractive' schedules were deemed less relevant to society as a whole.

Figure 11: Schedule rankings for self and society before costs



The next stage of the workshops asked participants to take account of the likely costs that would be associated with each schedule in five years' time.

It was explained that financial pressure is growing on the public service broadcasters and that the more challenging types of programming and programming for particular audiences (e.g. children's, regional output) tend to be less profitable than other types of programming. Participants were told that:

- The 'Current mix of PSB' schedule would cost the country an extra £10 per household per year;
- The 'More commercially attractive' schedule would cost the country the same as now;
- The 'Mid-way schedule' would cost the country an extra £5 per household per year;

- The 'Less commercially attractive' schedule would cost the country an extra £15 per household per year⁵.

When the likely costs associated with each schedule were factored in, some participants shifted to the cheaper schedules and there was slightly more opposition to the most expensive 'Less commercially attractive' schedule. (Figure 12.)

I know it's not a lot, but it is the principle
Female - Manchester

For most workshop participants, however, the cost of maintaining the current programming mix seemed relatively small compared to the practical on-screen benefits. The 'Current mix of PSB' remained the most popular schedule with participants personally.

Such a little bit of money over 12 months
Male -Coventry

In relation to the societal rankings, there was a more pronounced shift away from the more expensive schedules towards the cheaper, more commercially attractive schedules, with a significant minority of participants opting for one of these schedules as their first preference when costs were factored in.

These participants tended to be worried about the ability of others in the wider community to pay for the more expensive schedules, even if they personally could afford to pay. A few participants also questioned why it was necessary to fund the commercial broadcasters when the BBC delivered public service provision.

The cost is little to some of us, but it might have a bigger effect on others
Female – Carmarthen

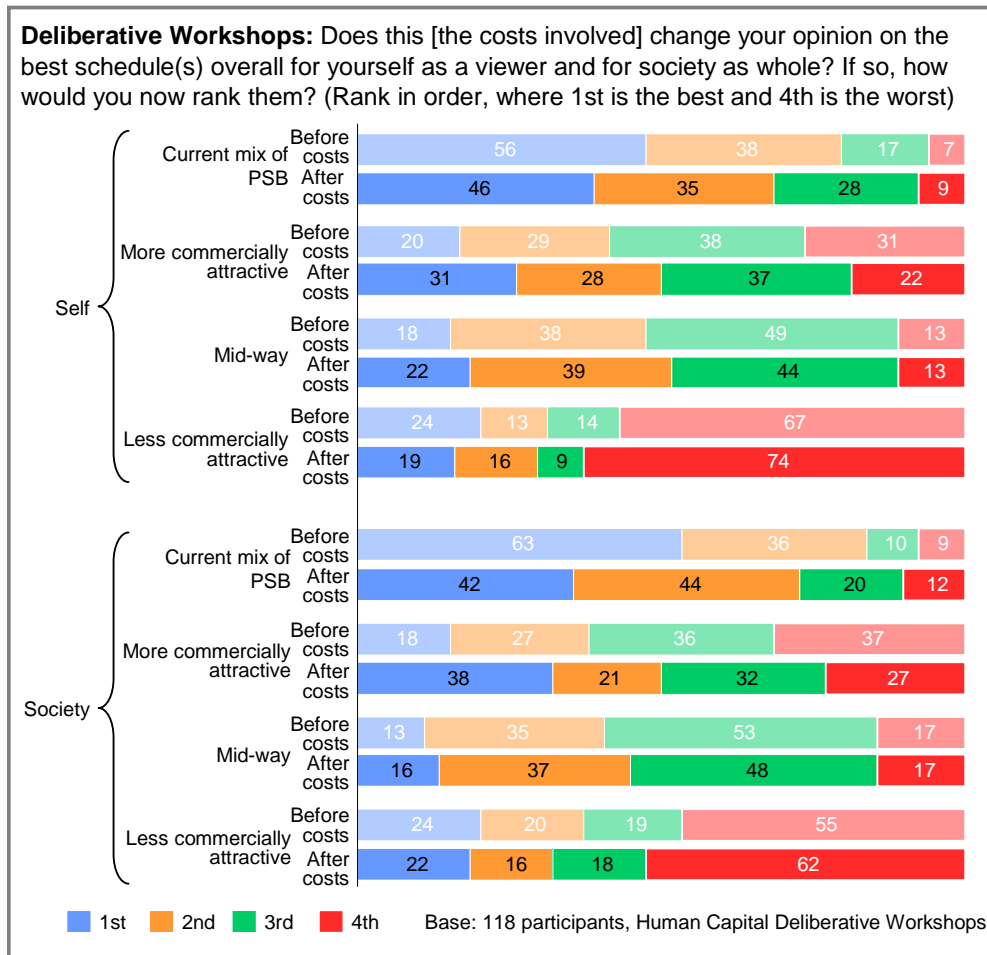
Overall, on the issue of paying to maintain plurality of provision across the public service broadcasters, the schedules ranking exercise revealed that participants were relatively more inclined to pay personally than to impose those costs on society.

⁵ The potential costs associated with the different schedules in the future were estimated on the following basis:

- The cost of today's public service obligations was thought of as the *opportunity cost* to the commercial broadcasters of delivering their obligations rather than other potentially more profitable types of programming. For Channel 4, this was assumed to be £75m-£100m per year. For ITV1, the range was assumed to be £100m-£125m per year and £25m per year was assumed for Five. All together, the cost to the commercial broadcasters was estimated at £200m-£250m per year. With 25m taken as the number of UK households, the cost of today's obligations comes out at approximately £10 per household. ('Current mix of PSB' schedule)
- With no public service obligations, the cost was assumed to be zero. ('More commercially attractive schedule')
- The cost of the 'Mid-way schedule' was calculated as half way between £0 and £10 per household.
- Finally, the increased public service investment was assumed to be 50% higher than today's intervention – £15 per household. ('Less commercially attractive schedule')

The schedules exercise also highlights the subtleties of understanding audience attitudes towards the public funding of plurality of PSB provision. Despite support for PSB across the commercial PSBs, enthusiasm fell substantially (perhaps also inevitably) when the costs associated with its continuation were factored in. As seen in section 6.5, this finding was confirmed by subsequent questioning in the deliberative workshops and the quantitative survey where audiences expressed themselves largely in favour of the commercial PSBs retaining their PSB responsibilities, yet again were reluctant to allocate public money to these broadcasters, even when made aware of the genres at risk without intervention. Overall, the research shows that, whilst there is audience support for plurality in principle, there is much less appetite to back it financially in practice.

Figure 12: Schedule rankings for self and society after costs



6.5 The future role of ITV1, Channel 4, Five

The research then considered directly the future role of ITV1, Channel 4 and Five.

In the workshops, participants were reminded about the current statutory responsibilities and funding arrangements of ITV1, Channel 4 and Five and asked how important they felt it was for ITV1, Channel 4 and Five to continue to be required, legally, to deliver public service programming in the future.

Most participants indicated that the continued role of these broadcasters was important – especially for ITV1 and Channel 4.

With choice comes quality... You need a bit of competition
Female - London

In the quantitative research, it was explained that, in the future, ITV1, Channel 4 and Five might find it harder to keep showing the same mix of programmes with public service aims as they do now, since these programmes generally tend to make less money. In particular, respondents were told that ITV1, Channel 4 and Five could show less:

- Current affairs;
- Serious documentary;
- Regional news;
- One-off UK drama;
- Children's programmes.

Respondents were then asked to what extent they thought these broadcasters should continue to be made to show programmes with the public service aims, alongside the BBC.

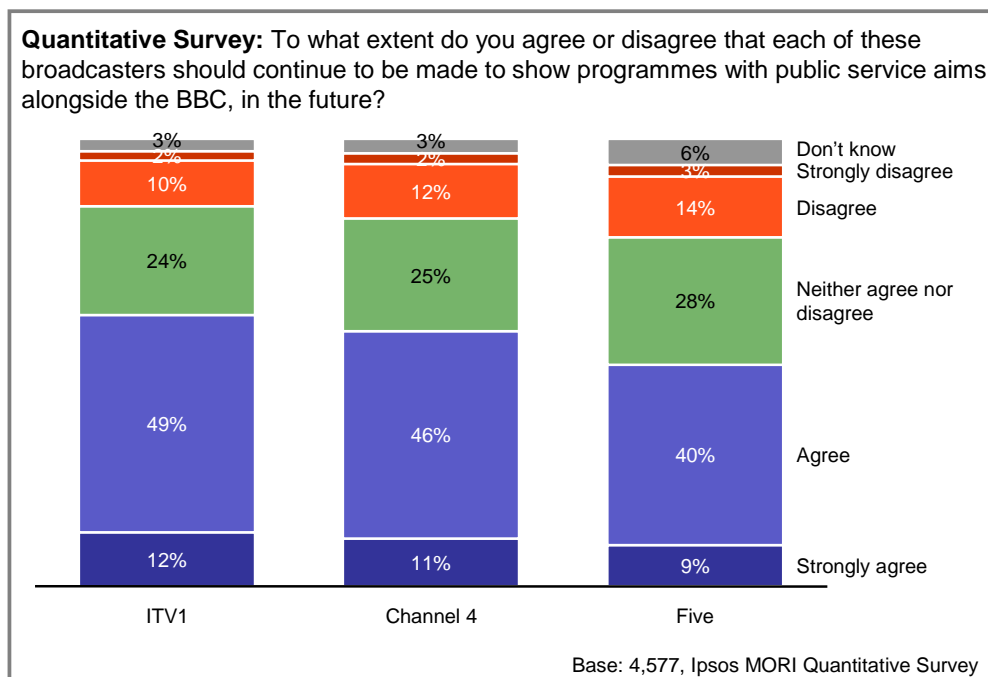
The quantitative research confirmed the deliberative finding, with about five times as many respondents agreeing that ITV1 should continue to be made to show programmes with public service aims, alongside the BBC, as disagreeing – with comparable ratios of about four for Channel 4 and almost three for Five. (Figure 13.)

In relation to the demographic subgroups from an analysis of the quantitative data:

- Those without internet / broadband access and those in non-white homes felt most strongly that the commercial broadcasters should continue with their public service commitments;
- Those in multichannel homes felt that continued public service on the commercial broadcasters was less important than those in terrestrial-only homes – especially in relation to Channel 4 and Five;
- Apart from relatively high support for ITV1 in Northern Ireland, responses were fairly flat across the nations;
- Responses were also fairly flat on age and SEG;
- BBC “approval”⁶ also correlated with attitudes to public service provision on the commercial broadcasters: high BBC approvers felt most strongly that they should continue with their public service commitments, whilst low BBC approvers felt least strongly that they should;
- In contrast, attitudes to future public service provision on the commercial broadcasters were much flatter in relation to approval of the commercial broadcasters.

⁶ Defined in terms of general impression of broadcasters: high approvers score the broadcaster 8-10 out of 10; mid-approvers, 5-7; and low approvers, 1-4.

Figure 13: Importance of continued PSB commitment by ITV1, Channel 4 and Five



However, there was much less support for the notion that public money should be used to support the future public service commitment of these broadcasters among workshop participants.

- Many participants thought that high quality programming should be capable of earning sufficient advertising revenue and that, as commercial businesses, they should stand on their own feet. Participants expressed concern at what they perceived to be a subsidy for commercial businesses;
- In addition, many worried about imposing costs on other people, even if they themselves could afford it;
- Finally, some people objected to the principle of paying more on top of the Licence Fee and pay TV subscriptions.

Channels are set up as a business to make money – why should we pay for them?
Male - Edinburgh

At the same time, however, a minority of participants argued that the commercial environment is becoming tougher for the broadcasters and that, unless we are prepared to accept wider deterioration in the quality of programming on offer, people should be prepared to support them financially.

Overall, the views expressed in this part of the research were consistent with the earlier schedules exercise in that deliberative workshop participants themselves largely supported the idea of plurality of provision across the public service broadcasters. However, indicative of the complexity surrounding audience views on this matter, when thinking directly about the status of the commercial broadcasters, they were reluctant to

commit public money to them to support this, with participants going on to argue that they disliked the idea of using public money to subsidise commercial companies.

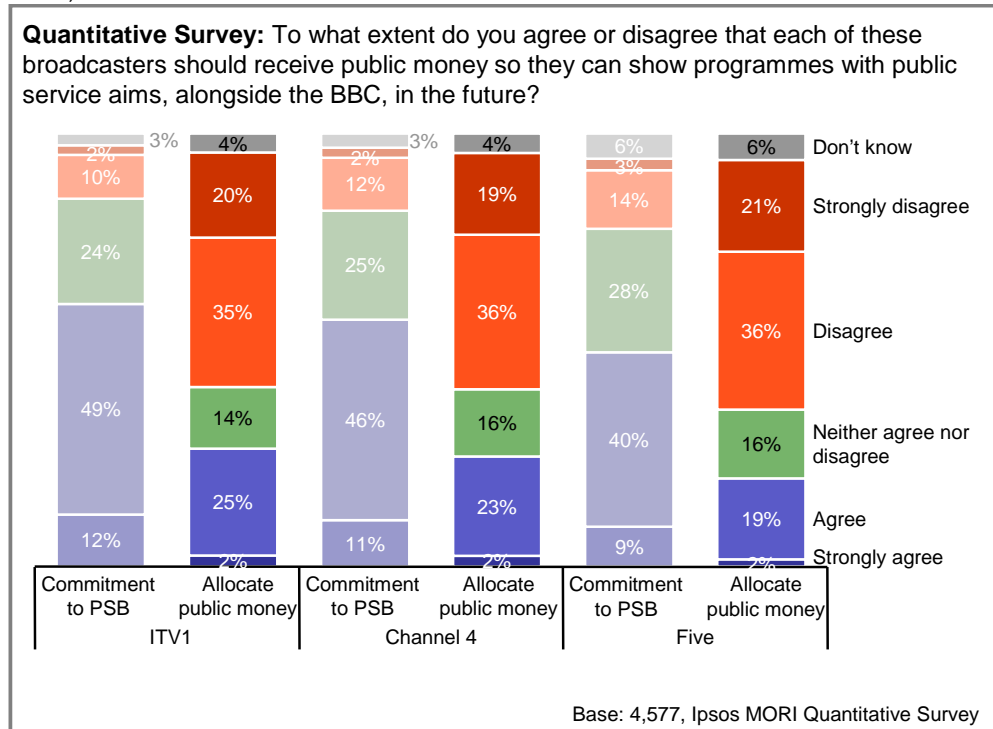
*The Licence Fee is already high, you have to think about
people who could not afford [to pay more]*
Male – London

Again, the quantitative research substantiated this view. Respondents were told that to keep showing the same mix of programmes with public service aims as they do now, ITV1, Channel 4 and Five could need public money – up to the equivalent of an extra £15 per household per year overall. These respondents had previously been very clear that ITV1, Channel 4 and Five should continue with their public service role (Figure 13). Yet, even when made aware of the genres where programming could reduce without intervention, there was low levels of agreement that these broadcasters should receive public funding to support future PSB commitments. Now there were about twice as many respondents *disagreeing* that public money should be used to support ITV1 and Channel 4 as *agreeing*, rising to a factor of almost three for Five. (Figure 14)

In relation to demographic subgroups:

- On age, 16-24s were most in favour of using public money to support the commercial broadcasters; 55+ respondents were least in favour. (Interestingly, 16-24s were also the age group least likely to pay for the Licence Fee themselves.)
- The data was fairly flat on television platform, broadband access and SEG;
- As for the previous question, apart from relatively high support for ITV1 in Northern Ireland, responses were fairly flat across the nations;
- Mid and high approvers of each broadcaster were more in favour of using public money to support that broadcaster than low approvers of the broadcaster;
- Mid and high approvers of the BBC also tended to support the use of public money for the commercial broadcasters compared with low BBC approvers.

Figure 14: Willingness to invest public money to support continued PSB commitment by ITV1, Channel 4 and Five



7 Attitudes to sources of funding

This part of the research was designed to understand preferences in relation to different potential sources of funding for public service intervention in the future, alongside the BBC.

The research went on to explore attitudes to the Licence Fee in more detail, in particular attempting to understand the extent to which the audience's link to the BBC was shaped by the existence of the Licence Fee.

The research also looked at the perceived value of the BBC.

7.1 Attitudes to the funding options

In both the deliberative and the quantitative research it was made clear that, in the future, there were different ways that public funding could be provided to ITV1, Channel 4 and Five so that they could continue to show programmes with the public service aims.

Five potential options were described to participants in the deliberative research:

- A government grant from the general pool of taxation;
- The National Lottery;
- A higher BBC Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - and an unaffected BBC;
- The same BBC Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - and less money for the BBC, which might affect what the BBC can do;
- A general tax to be paid by all commercial broadcasters.

Two more options were added in the quantitative:

- Give other benefits to ITV1, Channel 4 and Five e.g. discounts on payments they may need to pay to broadcast (i.e. spectrum charging);
- Allow ITV1, Channel 4 and Five to show a few more minutes of advertising.

In the quantitative survey, respondents were asked to score the favourability of each potential funding method on a scale of one to ten (where one meant 'extremely unfavourable' and ten meant 'extremely favourable'). The results of this scoring exercise are presented in Figure 15.

As can be seen, the mean scores were relatively low across all funding methods (all are under six), highlighting respondents' reluctance to see public money used to fund PSB programming on ITV1, Channel 4 and Five. This lack of enthusiasm is in line with earlier findings from both the deliberative workshops and the quantitative survey where, although in favour of the commercial PSBs retaining their responsibilities to provide PSB programming alongside the BBC, audiences were, notwithstanding, reluctant to countenance the allocation of public money to these broadcasters, even when made aware of the genres where programming was at risk without intervention. (As Figure 14 sets out, there were low levels of agreement that that ITV1, Channel 4 and Five should receive public funding.) Further, the schedules exercise in the deliberative workshops

showed that, after participants were made aware of the costs involved, and thinking of the needs of society overall, the most pronounced shift in opinion occurred away from the more expensive schedules (especially the current mix of PSB) and towards the more commercially attractive (and cheaper) schedules.

While, as Figure 15 shows, none of the probed funding options proved particularly popular with survey respondents (as might be expected), within this context of a general disinclination towards paying for PSB on the commercial PSBs, there was a preference towards those methods that did not affect them directly: namely, the National Lottery, giving other benefits to ITV1, Channel 4 or Five (e.g. discounts on payments they may need to make to broadcast), a tax on all commercial broadcasters and more minutes of advertising.

This echoed findings from the deliberative workshops where, commenting on a shorter list of options, participants had also favoured the National Lottery and a commercial broadcaster tax.

*At least you probably wouldn't notice [a tax on broadcasters
or funding via the National Lottery]
Female - Manchester*

Notwithstanding support for these options, a minority of workshop participants did raise issues in relation to both:

- On the tax on commercial broadcasters, some worried that it would act as a barrier to potential new channels or that it would have an effect on programming budgets or that the cost would be passed on to viewers.
- On the National Lottery, some concerns were indicated that broadcasting was not a deserving cause and that its use in this way would divert money from the existing worthy causes.

In both the quantitative study and the deliberative workshops, the funding options that were perceived to affect audiences most directly emerged as the least popular. In the quantitative survey, the redistribution of the Licence Fee at its current level and a direct Government grant ranked fifth and sixth out of the seven probed funding options, while the sharing of the Licence Fee at a higher level was the least popular method. Almost half the quantitative sample gave low scores (i.e. 1-4 out of ten) to sharing the current Licence Fee and a government grant, with over 70% giving the higher Licence Fee similarly low scores of 1-4.

In the deliberative workshops, participants had also disliked the idea of paying through general taxation, since this implied that tax rates might have to go up.

*Taxes should be paying for better health and education
Female - Manchester*

Equally, there was low support for distributing some of the Licence Fee at its current level. Many workshop participants expressed a feeling that, given its central role in the provision of public service broadcasting, the BBC should not be compromised in its ability to offer high quality programming and that, in the face of declining standards, it should be protected.

The BBC would have reason to say we can't do all that quality any more, we don't have the money
 Female - Tiverton

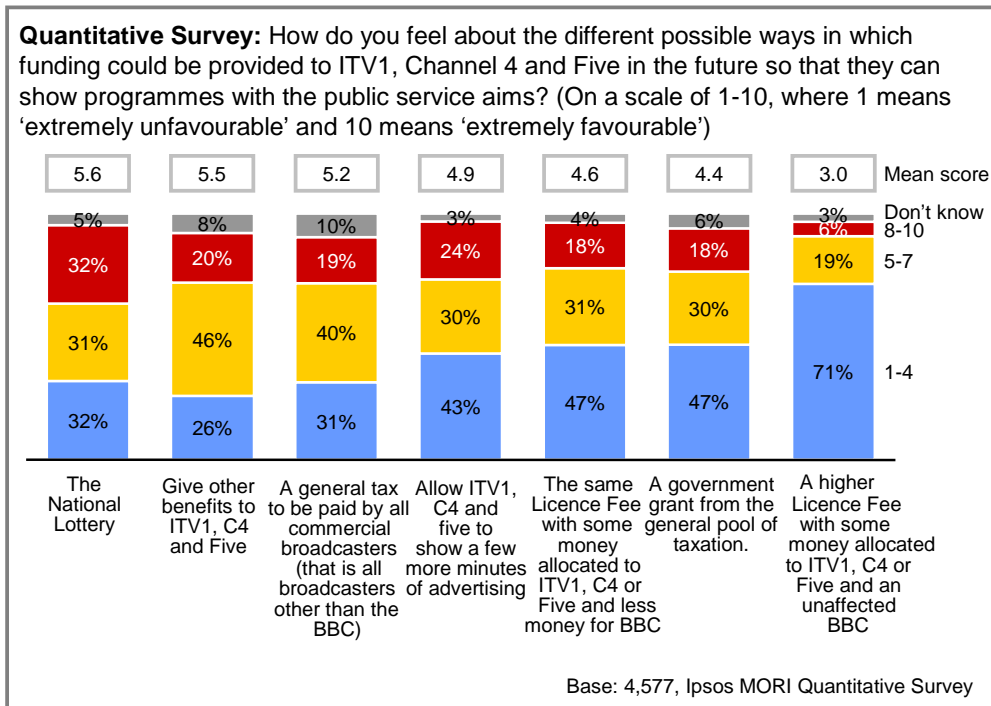
A very small minority felt that there were BBC services that they could forgo (e.g. BBC Parliament).

The idea of sharing the Licence Fee at an increased level was generally very unpopular. Again, a very small minority of participants in the deliberative workshops stated they could see this making sense, if it would help to maintain quality standards, as it was an established means of collecting money off people.

Once they raise the Licence Fee, it would only get higher
 Male – London

Unaffected BBC is important to me. If you have extra stuff, you have to pay for it some how. So a higher Licence Fee would be a way of collecting it somehow
 Female – Tiverton

Figure 15: Attitudes to potential sources of public funding



Ascertaining audience reaction to the funding methods available to finance public service programming on ITV1, Channel 4 and Five is a complex area of research, not least because views can be affected by the choices respondents are presented with and the extent to which they understand the various potential funding options. In the quantitative survey, two other questions relating to funding were included, in particular to explore the use of the Licence Fee to fund public service content on the commercial broadcasters.

- Earlier in the questionnaire, respondents were asked to make a stark choice between a limited number of alternatives and with limited prompting;
- Later, after more extensive prompting on the range of funding methods that could be available, respondents were asked to select an option they preferred.

For the first question, respondents were told that one possible way of providing public money to other broadcasters in the future would be to allocate them some of the Licence Fee. The twin implications of using the Licence Fee in this way were explained thus:

- On the one hand, other broadcasters could be required to show some programmes with public service aims;
- On the other hand, the funding that the BBC receives could be reduced which, in turn, could affect what the BBC could do.

Respondents were asked to choose a single option from a choice of three: allocating some of the Licence Fee to other broadcasters; providing other sources of public funding; and providing no public funding at all.

Given this stripped-down choice, about three in ten (31%) respondents chose to allocate some of the Licence Fee to other broadcasters, whilst twice as many or six out of ten (61%) chose not to pass on a share of the Licence Fee to other broadcasters.

Respondents in this latter group preferred either to find other ways of funding other broadcasters (26%) or not to provide public funding at all (35%). 8% said “Don’t know”.

In the later investigation of funding methods, respondents were presented with the full range of possible funding options that could be available to fund content with public service aims on ITV1, Channel 4 or Five (list as per Figure 15) and were asked to choose an option they preferred.

- Reflecting the deliberative work and the ratings in Figure 15, there was again a preference for indirect funding means, with the National Lottery and more advertising minutage coming in a top band, chosen by 27% and 18% of respondents respectively.
- In a middle band came the reallocation of the current Licence Fee (13%), giving other benefits to ITV1, Channel 4 and Five (10%), a commercial broadcaster tax (9%) and a government grant (9%).
- Least popular again was the Licence Fee at a higher level (3%)
- 5% of respondents said ‘Don’t Know’ and another 5% could not select any of the options, indicating, ‘None of these’. (There was no option available to not provide any funding at all.)

What can be seen from responses to this question is that when presented with a full range of funding options, fewer people selected the allocation of the Licence Fee at its current level to fund PSB on ITV1, Channel 4 and Five. These findings would suggest that what support there is for the redistribution of the current Licence Fee decreases when respondents have a greater awareness of the other funding options available. In any case, the quantitative research indicates that it is a minority of the audience who would support the allocation of some of the Licence Fee at its current level to ITV1, Channel 4 and Five,

with the actual proportion appearing to lie between 31% at most (an initial reaction) and 13% (a more informed response).

7.2 The role of the Licence Fee in linking the audience to the BBC

Given the complexity – and importance – of the audience’s attitude towards the Licence Fee, the research went on to seek to understand the extent to which the audience’s link to the BBC is shaped by the existence of the Licence Fee.

First, quantitative survey respondents were asked about their attitudes towards the BBC, ITV1, Channel 4 and Five. Then respondents were asked to indicate the extent to which they believed that the existence of the Licence Fee determined the way they felt towards the BBC, compared with the way they felt towards other public service broadcasters.

In relation to each public service broadcaster, quantitative survey respondents were asked to what extent they:

- Cared a lot about the public service broadcaster and its programmes and services;
- Believed that the public service broadcaster belonged to the public;
- Expected the public service broadcaster to provide programmes and services that appealed to everyone’s tastes.

Overall, respondents in the survey indicated that they cared more about the BBC, were more inclined to feel it belongs to the public and place higher expectations on the BBC compared with their feelings towards ITV1, Channel 4 and Five.

- Nearly two-thirds (64%) of quantitative respondents agreed that they cared a lot about the BBC and its programmes and services, compared with around half for ITV1 (49%), two-fifths for Channel 4 (39%) and one-quarter for Five (24%) (Figure 16).
- Over 7 in 10 respondents (71%) agreed that the BBC belonged to the public, compared with around 3 in 10 for ITV1 (33%) and Channel 4 (28%) and 2 in 10 for Five (22%) (Figure 17).
- Finally, 84% of respondents expected the BBC to appeal to everyone compared with 74% for ITV1, 66% for Channel 4 and 58% for Five (Figure 18).

Figure 16: Attitudes towards public service broadcasters – care

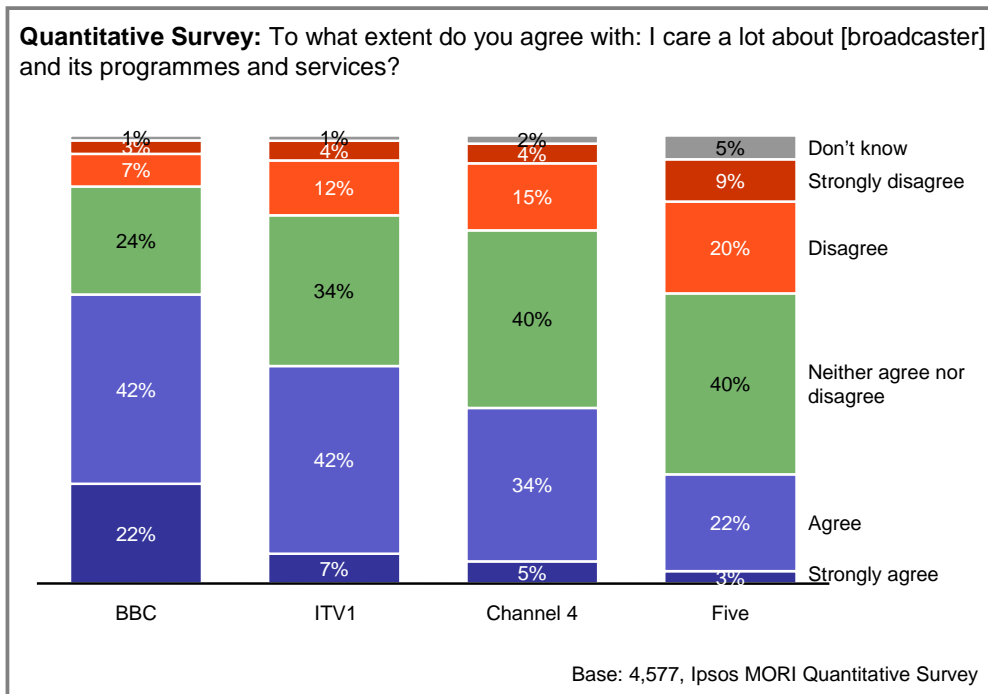


Figure 17: Attitudes towards public service broadcasters – belonging to the public

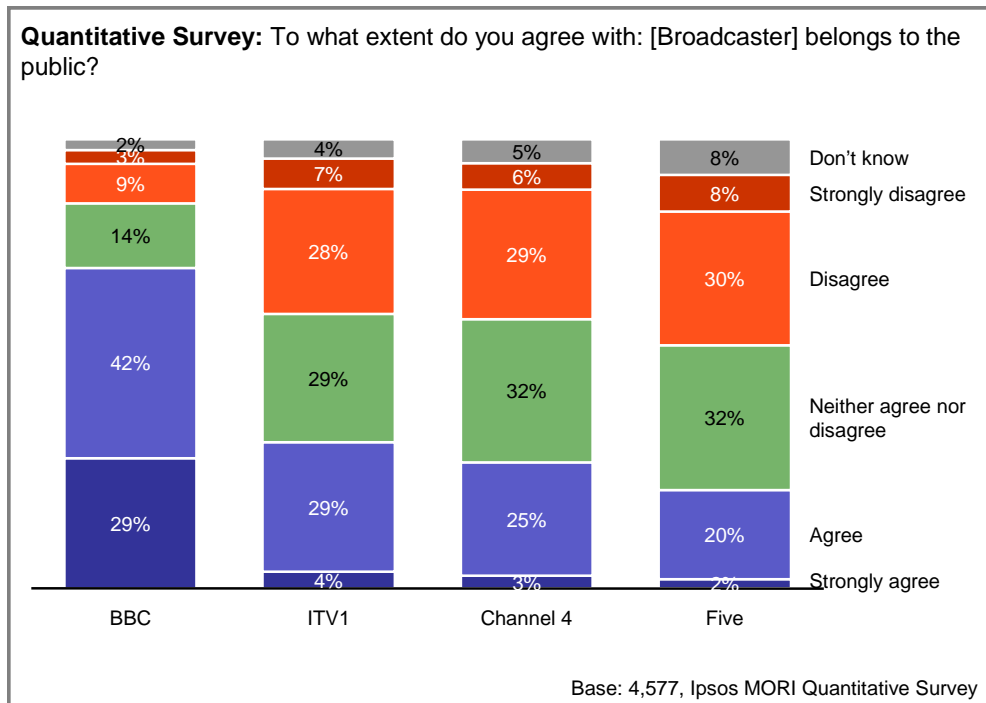
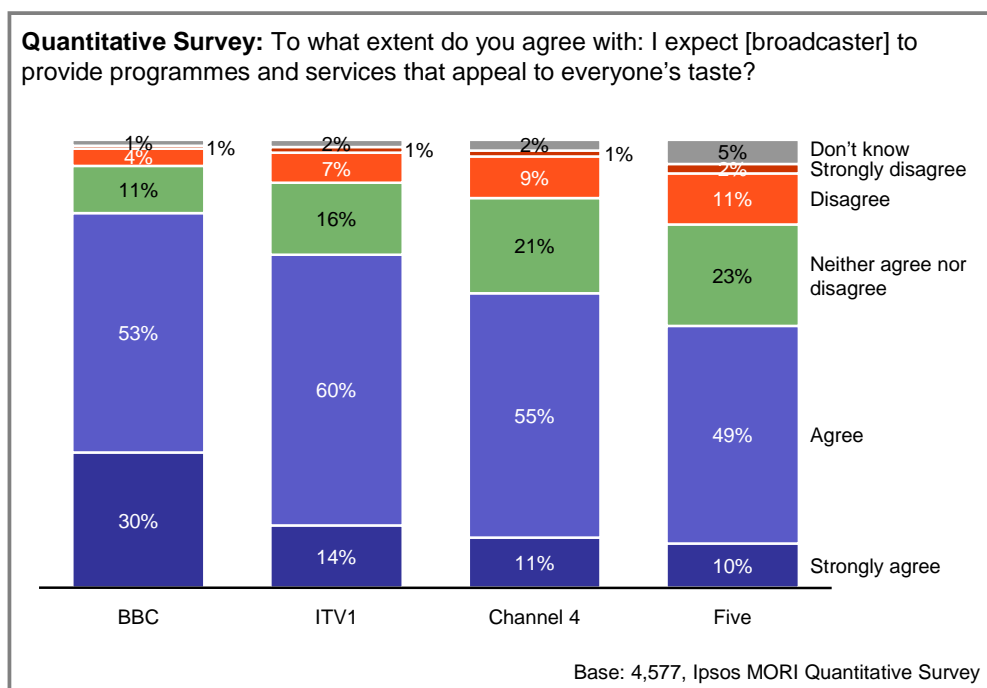


Figure 18: Attitudes towards the public service broadcasters – expectation of something for everyone



Having asked respondents about their attitudes towards the different broadcasters, the quantitative research then focused on the role played by the Licence Fee in determining the way respondents felt about the BBC.

Accordingly, respondents were asked to indicate the extent to which they believed that the existence of the Licence Fee influenced their feelings towards the BBC, compared with other public service broadcasters, in relation to four aspects of the link:

- Strength of feeling;
- Care about how money is spent;
- Accountability;
- Provision of programmes that suit everyone's tastes.

The quantitative research suggests strongly that the Licence Fee plays an important role in shaping the audience's link to the BBC⁷. Because the public pays for the BBC via the Licence Fee, people say they feel more strongly about the BBC generally, compared with other broadcasters, and specifically in terms of accountability (both financial and regarding what the BBC shows and does) and an expectation that the BBC should serve everyone. This reflected the deliberative discussions in which participants felt that the Licence Fee

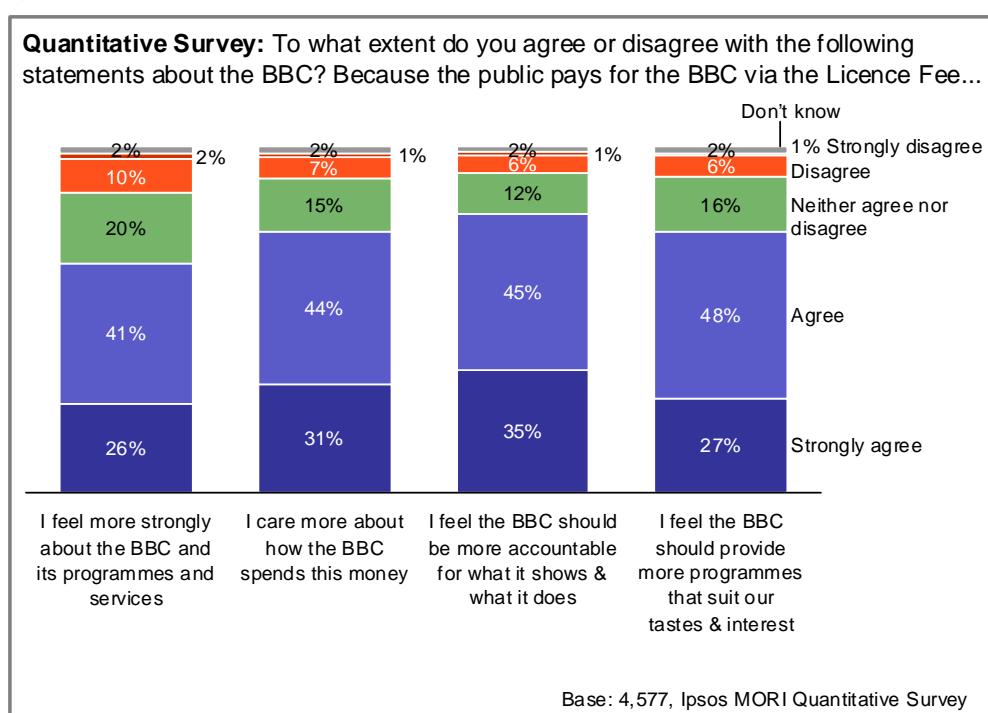
⁷ Understanding the role of the Licence Fee is a complex area. Whilst this research has looked at the way in which the Licence Fee currently conditions the audience's link to the BBC, it has not explored the counter-factual – either how the link to the BBC might change if some of the Licence Fee were allocated to other broadcasters or how the link to other broadcasters might change if they were to receive some of the Licence Fee. Notwithstanding, the quantitative research shows that the Licence Fee is an important part of the way that the audience relates to the BBC.

created a link to the BBC and placed special obligations on the BBC in terms of trustworthiness, accountability and a responsibility to serve everyone.

As Figure 19 sets out, in the quantitative research:

- Two-thirds (66%) of respondents felt that the existence of the Licence Fee made them feel more strongly about the BBC than they did about other broadcasters;
- Three-quarters (75%) said it led them to care more about how the BBC spends its money than about how other broadcasters spend their income;
- Three-quarters (75%) said it led them to expect more programmes to suit everyone’s tastes than what they would expect from other broadcasters;
- Four-fifths (81%) said the Licence Fee caused them to expect greater accountability from the BBC than other broadcasters.

Figure 19: The role of the Licence Fee in the audience’s link to the BBC



7.3 The perceived value of the BBC

The research also looked at how much people valued the BBC in terms of pounds and pence.

In the deliberative workshops, the valuation exercise followed a discussion of the benefits to society of public service broadcasting and began with an explanation of all the television, radio, online and interactive services offered by the BBC.

Participants were asked which services they had previously been aware of and which they used on a regular basis. They were then invited to state how much each BBC service was worth per household thinking about society as a whole, in terms of pounds and pence per

month. This led to a “bottom-up”, or service by service, valuation of the BBC⁸.

In the quantitative survey, respondents carried out a “top-down” valuation exercise assessing the value to society of the BBC as a whole. Prior to answering the valuation question, respondents had answered some questions on the importance of the public service aims and characteristics and they were shown a list of the BBC services funded by the Licence Fee, but there was no discussion of public service broadcasting and no discussion of the BBC services as there had been in the deliberative workshops.

In addition, the quantitative methodology used a range of fixed prices at which the Licence Fee could be set in the future and asked respondents to indicate whether, in a hypothetical national vote on the future of the BBC, they would vote to keep the BBC open as it is at each price (shown in random order) or vote to close down the BBC and stop charging the Licence Fee⁹.

In the deliberative workshops, participants indicated that the “bottom-up” value to society of the BBC was £31.57 per month. In the quantitative survey, respondents indicated that the “top-down” value to society of the BBC was £20.43 per month. These values compare with the current Licence Fee of £11.63 per month, and thus indicate that the value to society delivered by the BBC is greater than the total amount collected through the Licence Fee. The difference between the value scores obtained in the workshops and the quantitative survey is broadly consistent with the respective methodologies employed and reflects the greater amount of prompting in the deliberative workshops.

In 2004 a programme of quantitative research¹⁰ found a “top-down” citizen valuation of the BBC of £20.70¹¹ and a “bottom-up” citizen valuation of £23.50.

⁸ Deliberative participants were asked to imagine that people no longer had to pay the Licence Fee. It was pointed out that the answers would not be used to determine the level of the Licence Fee since this had recently been set through to 2012. The current level of the Licence Fee was not revealed to the workshop and participants were asked not to share the information if they knew. It was made clear that they were not being asked to say how much they would be willing to pay for each BBC service, since the answer to this question tended to be affected by participants’ ability to pay. Finally it was explained that worth to society could include services that participants did not use themselves but which could be of benefit to other households or society generally. Outliers were defined as those who gave a total score of more than £100 and were removed from the data set.

⁹ Respondents were told that even if they did not pay the Licence Fee themselves, the research was still interested in their opinion. They were also told that the answers to the question would not be used to decide the Licence Fee since it has already been set through to 2012. The price points were randomised.

¹⁰ Measuring the Value of the BBC, Human Capital / BBC, 2004

¹¹ In the 2008 study an attempt was made to take forward the 2004 methodology by understanding each respondent’s “true” valuation of the BBC. This was done by asking respondents to indicate any other price points at which they would keep open the BBC after they had initially been shown the fixed price points. This methodology yielded a valuation of £19.86, close to the £20.43 figure derived from the 2004 methodology, which calculated the area under the “demand curve” by using the mid-points of the price bands.

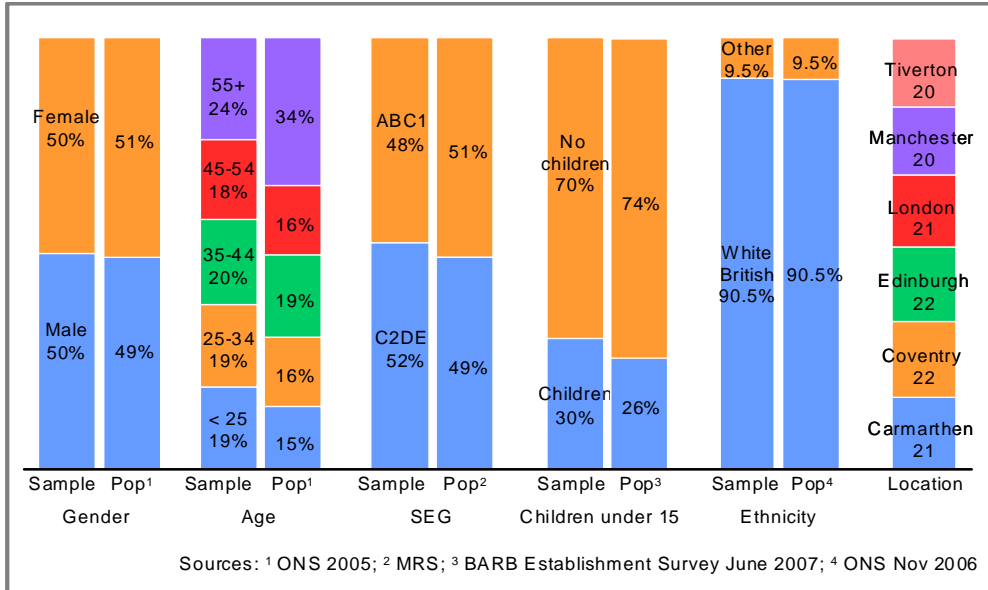
8 Concluding points

- Audiences show continuing strong support for the aims and characteristics of public service broadcasting.
- Although digital television and the internet are diminishing the need for PSB for a minority, according to the deliberative workshops, most people think that PSB is needed as much as ever.
- Commensurate with their respective PSB obligations, the BBC is recognised as the main deliverer of the public service aims, with ITV1 and Channel 4 in a second group and Five further behind.
- Public service provision is also appreciated from sources other than the designated PSBs. Sky (both specific channels and the platform), in particular, is mentioned unprompted in this context and is regarded highly in terms of impression. Moreover, the range of (commercial) digital channels is thought to contribute to the plurality outcomes insofar as they add to the variety of programme approaches on offer.
- When considering directly the future role of the commercial public service broadcasters, there is audience support for their continuing public service commitments.
- Nevertheless, there are low levels of agreement that the commercial PSBs should receive public money – even when respondents are made aware of the genres where programming is at risk without intervention. Consistent with this, respondents give relatively low scores across a range of potential funding mechanisms that could support public service programming on these channels.
- Against this backdrop, there is a preference towards those methods that do not affect respondents directly (i.e. the National Lottery, giving other benefits to ITV1, Channel 4 or Five, a tax on commercial broadcasters and more advertising minutage), whilst those methods perceived to impact on the audience most squarely are the least popular (i.e. allocating the Licence Fee at its current level, a direct Government grant and sharing the Licence Fee at a higher level).
- The research examined further attitudes towards the allocation of part of the Licence Fee to ITV1, Channel 4 and Five to fund public service programming. The evidence suggests that there is minimal to minority backing for this, with the proportion selecting this at a maximum of 31% when respondents have to give an initial reaction without being presented with all of the possible funding options, but is probably closer to 13% - the figure when audiences have a range of funding methods presented to them and so can take a more informed view. In any case, on the basis of this, the clear majority of respondents prefer other options over the allocation of the Licence Fee.
- On the link between the audience and public service broadcasters, it is clear that audiences feel differently about the BBC compared with other PSBs. The quantitative research strongly suggests that the Licence Fee plays an important role in shaping the audience's link to the BBC.

Appendix 1: Deliberative sample

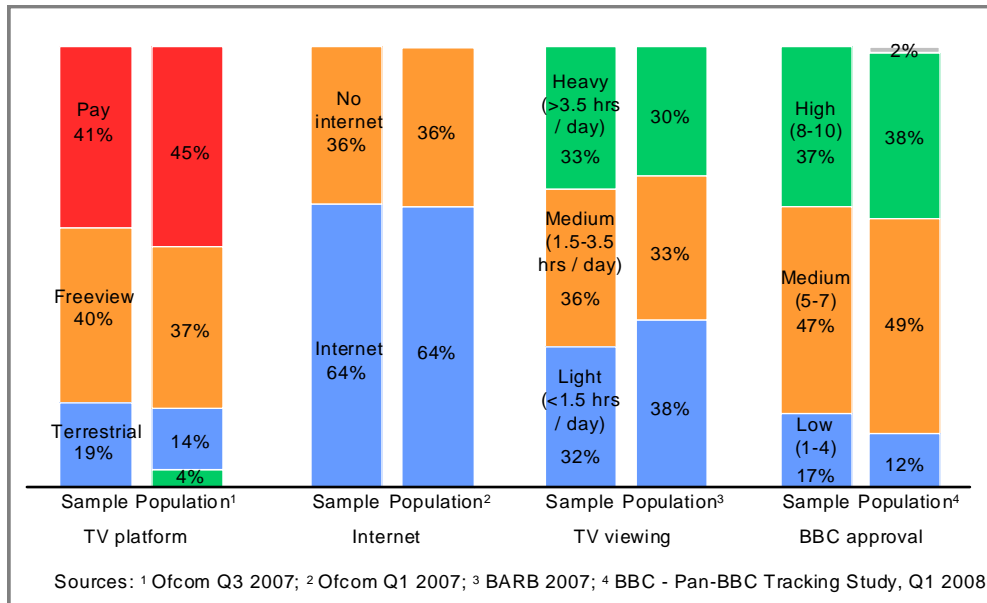
The following table shows the socio-demographic profile of participants included in the deliberative workshops.

Figure 20: Profile of the workshop participants



Their media-related attributes are set out here:

Figure 21: Media characteristics of the workshop participants



Appendix 2: Deliberative workshop discussion guide

Text in black indicates the text seen by respondents during the workshop. The text in green denotes the interviewer's prompts to stimulate discussion (which were not shown to respondents).

Media Workshop Questionnaire – Interviewer Version

1. What is your name?

2. Which of these age brackets do you fall into?

16-24

45-54

25-34

55-64

35-44

65+

3. Are you:

Male

Female

4. How many people (adults and children) live in your household including yourself?

.....

5. And how many of those are children aged 15 or under?

.....

6. And which age group do these children in your household fall into?

0-1 years of age

2-4 years of age

5-9 years of age

10-15 years of age

Don't Know

I'd rather not say

Not applicable

7. At which age did you finish your full time education?

- Under 16
- 16
- 17
- 18
- 19+
- Still studying

8. Are you the main income earner in your household - that is the person with the largest income, whether from employment, pensions, state benefits, investments or any other sources?

- Yes No Don't Know

9. Which of these best describes the main income earner's working status?

- Work full time (30 hours or more a week)
- Work part time (less than 30 hours a week)
- Self employed
- Housewife / househusband / homemaker
- Retired
- Full time student
- Unemployed and seeking work
- Disabled / long term sickness
- Prefer not to say

10. What is the type of company where the main income earner works? (If retired, please answer these questions thinking about their previous occupation.)

.....

11. What is the job actually done by the main income earner?

.....

12. What is the title, rank, grade, etc. of the main income earner?

.....

13. Approximately how many people work at the company altogether?

0-10

51-100

11-20

More than 100

21-50

Don't Know

14. Is the main income earner responsible for any other employees at work?

Yes

No

Don't Know

15. If yes, how many?

.....

16. Does the main income earner have any qualifications (such as apprenticeships, professional qualifications, university degrees, diplomas, etc.)?

Yes

No

Don't Know

17. If yes, what are their qualifications?

.....

PLEASE STOP HERE FOR A MOMENT

[Introductions and warm-up questions](#)

Broad Media Consumption

Could you please fill in some details about the media you and your household consume at home?

18. Do you have a television at home?

Yes

No [if no then please go to question 22]

19. Who pays the licence fee in your household?

I do

I share the cost with others

Somebody else pays

I am / we are given it for free because somebody in the home is over 75

20. Please would you fill in the box below to tell us what kind of TV you have in your home (please tick all that apply).

	Main Set	Any other sets
The five terrestrial channels (BBC One, BBC Two, ITV1, Channel 4/S4C, Five)		
Freeview		
Sky		
Cable		
Other, please state		

21. Does your household have a digital television recorder(s) (e.g. Sky+, V+, Freeview Playback, another kind of digital television recorder e.g. with cable or connected to broadband)?

Yes

No

Don't Know

22. Do you use the internet to access websites at all nowadays?

Yes

No

23. If yes, what type of internet connection do you have at home?

Broadband

Narrowband (dial-up)

Internet connection at home but not sure which type

I do not have internet access at home – I access it somewhere else

Not sure

24. Please could you fill in this table that describes the amount of media consumed by you and other people that live in your home.

When completing the grid for RADIO, please include all your listening (e.g. at home, in the car, in someone else’s home, at work, etc.) and include any listening via a normal radio set as well as live via the internet, Digital TV, mobile phone or DAB Digital Radio.

Person	TV watched on an average day (hours)	Radio listened to on an average day (hours).	Time spent online for personal use (i.e. not work-related) on an average day (hours)
You			
Other person A			
Other person B			
Other person C			
Other person D			
Other person E			
Other person F			
Other person G			

25. Have you done any of the following in the last month? (Please tick as appropriate.)

- Downloaded podcasts
- Watched short video clips over the internet
- Downloaded/watched whole TV programmes on the internet
- Used red button / interactive TV services (interactive services are usually accessed by pressing the ‘red button’ on your remote control and include extra programmes, extra information, games, voting and shopping, for example.)
- Accessed video clips on your mobile phone
- Listened to the radio via a DAB digital radio, the Internet or Digital TV

PLEASE STOP HERE FOR A MOMENT

[High level discussion of the role TV and other media plays in people’s lives.](#)

Public Service Broadcasting

Discussion:

- How important is broadcasting to you?
- What role does broadcasting play in your life?
- Can broadcasting have an impact on society?

Read out preamble to PSB:

We are now going to talk about public service broadcasting.

In the early days of TV and radio, it was believed that broadcasting could have a profound influence on society and that it should be brought within the public sector as a force for good.

Nowadays it still refers to TV and radio programmes and services that are made for the benefit of society as whole and not just to make money.

- **Broadcasting reaches everyone and can impact on the way people see the world**
- **We experience it individually, but collectively share the experience; think of the 'watercooler moment'**
- **It can deliver unexpected outcomes like teaching us things, or helping us to see people in a new light or informing us about the world and the UK or helping us to take part in our democratic elections or enriching UK culture**

Discussion:

- What kind of impact, if any, do people think PSB can have on the society in which we live?
- Is the concept of society clear in this context?
- Do they think it is a good or a bad thing for UK society?
- How important is this kind of thing to the group?

26. Which broadcasters, and individual TV and Radio services do you think currently have a responsibility for public service broadcasting?

.....

.....

.....

PLEASE STOP HERE FOR A MOMENT

Discussion about current perception of PSB:

- Who do they think currently have PSB obligations?
- What platforms do you think it refers to?
- What do they think the advantages and disadvantages of having PSBs are (with obligations defined by law)?

Following above discussion, show respondents stimulus about who the current PSBs are, and how their obligations differ (see Figure 22 and Figure 23).

Explain the BBC purposes.

Stress throughout question 27 that this is concerned with broad aims rather than current delivery.

Make sure people are clear what each of the purposes mean – especially “shared experiences”

In the UK there are four public service broadcasters – the BBC, ITV, Channel Four and five.

Each of these broadcasters is required by law to broadcast some public service content, although the extent of their responsibilities varies

27. Now we are going to describe some things that public service broadcasters try to achieve.

For each, could we ask you how important you feel it is for society as a whole?

Please give each a score of 1-10, where 1 means ‘not important at all’ and 10 means ‘very important.’

- To increase our understanding of the world through news, information and analysis of current events and ideas
- To get people interested in arts, science and history and other factual topics
- To encourage people to learn
- To bring everybody together for shared experiences – for example, on big national occasions like the World Cup
- To make us aware of other cultures and points of view
- To celebrate UK culture and stories in areas such as drama, comedy, music and arts

28. Is there anything else you think public service broadcasters should be trying to achieve?
(Please state)

.....
.....
.....
.....

PLEASE STOP HERE FOR A MOMENT

Discussion of the purposes of PSB:

- Is this the right list?
- What other things would the respondents add?
- Is there anything they think broadcasters should not be doing?

29. Below is a list of ways that public service broadcasters try to achieve these things.

For each, could we ask you how important you feel it is for society as a whole?

Please give each a score of 1-10, where 1 means 'not important at all' and 10 means 'very important.'

- To provide programmes / content made in the UK
- To provide programmes / content about the different regions of the UK
- To provide well made, high quality programmes / content
- To provide entertaining programmes / content
- To be fair, balanced and not take sides
- To be trustworthy
- To provide programmes / content that have fresh ideas and try different approaches
- To provide programmes / content that make people think
- To provide programmes / content that are engaging and that people want to watch, listen to, or use

30. Is there anything else you think public service broadcasters should be doing? (Please state)

.....

.....

.....

.....

PLEASE STOP HERE FOR A MOMENT

Discussion of the characteristics of PSB:

- Is this the right list?
- What other things would the respondents add?
- Is there anything that should not be on the list?

31. Overall, what do you think of the following public service broadcasters?

On a scale of 1 to 10 where 1 means extremely unfavourable and 10 means extremely favourable, or using any number in between, please tell me your general impression of each of the following:

- General impression of the BBC
- General impression of ITV
- General impression of Channel 4
- General impression of five

32. How well do you think each of these broadcasters is currently delivering the sorts of public service aims we have just talked about?

Please give a score of 1 to 10 where 1 means 'very poor' and 10 mean 'very good'.

- BBC
- ITV
- Channel 4
- Five

33. Are there any other broadcasters or channels that you think are currently delivering these aims?

.....

.....

.....

Discussion of the performance of the PSBs and other players

- How well do the respondents think the current PSBs are delivering the aims / characteristics?
- What about other broadcasters?
 - On Freeview?
 - On Pay services such as Sky and Virgin?

Show stimulus to prompt people as to what services are available on Pay / Freeview. (see Figure 24)
- What about non-broadcasters?
 - Websites?

- Other institutions?

Show stimulus to prompt people on online services such as Wikipedia, etc. (see Figure 24)

What do people think about the BBC in particular?

- To what extent do people feel differently about the BBC compared to other broadcasters?
- Do they think the UK is different in any way because of the BBC?

Different Kinds of Programming

We would like to discuss a range of different types of programme with you that are provided by a range of broadcasters. (Shown overleaf).

Make sure the group understands each genre.

Emphasise that we are talking about all broadcasters.

34. Which programme types are most important to you?

(Please score each on a scale of 1 to 10, where 1 means not important at all to you and 10 means very important to you)?

35. Which of the programme types do you think are the most important for the overall aims of public service broadcasting for society as a whole?

(Please score each on a scale of 1 to 10, where 1 means not important at all to the aims of public service broadcasting and 10 means very important to the aims of public service broadcasting)?

Show the aims of PSB discussed earlier on stimulus in the room (see Figure 25).

Stress that the last row includes all programming from overseas, while the rows above are UK-based.

Make sure they know what “other programming / content from your part of the UK” means.

Made in the UK

		Q34	Q35
Content Type	Examples	Most important to you	Most important to the aims of PSB
Sport	Match of the Day, Rugby World Cup, Champions League, Snooker, Test Match Special, itv.com/sport		
Soaps and long-running Drama	Casualty, The Archers, Hollyoaks, Coronation Street, Heartbeat		
Other Drama ¹²	Bleak House, Marple, Life on Mars, Skins, Secret Diary of a Call Girl		
Comedy	Little Britain, The Catherine Tate Show, My Family, Green Wing, Peter Kay's Phoenix Nights, Just a Minute		
Music	The Proms, Glastonbury, Popworld, The Chris Moyles Show, Wake up to Wogan		
Entertainment	Strictly Come Dancing, Any Dream Will Do, X Factor, Friday Night with Jonathan Ross, Dancing on Ice		
National and International News	Ten O'Clock News, Newsnight, ITV News, Channel 4 News, Five News, bbc.co.uk/news		
News from the Nations and Regions	Look East, BBC Regional News (e.g. London) , ITV Regional News (e.g. Anglia Tonight), BBC Local Radio		
Other programming / content for your part of the country	Inside Out, BBC Local Radio, London Talking, Granada Edition, River City, Where I Live		
Current Affairs	Panorama, The One Show, Dispatches, Crimewatch, Tonight with Trevor Macdonald, File on 4		
Serious Documentaries / Subjects	Planet Earth, Bodys shock, Extraordinary People, Monarchy by David Starkey, Horizon, bbc.co.uk/science and nature, In Business		
Film	Shrek, Billy Elliot, Titanic, Breakfast at Tiffany's, Gone with the Wind		
Children's	Balamory, Tweenies, The Worst Witch, Tracy Beaker, Milkshake, citv.co.uk		
Education	The Learning Zone, BBC Schools, Channel 4 Schools, BBC Bitesize, BBC RAW		
Lifestyle	Ready Steady Cook, Flog It!, Fifth Gear, Location Location Location, What not to Wear, 4Cars		
Factual Formats and Reality	Castaway, Big Brother, I'm a Celebrity Get Me Out of Here, Wife Swap, Life of Grime		
Programmes from outside the UK	Heroes, Neighbours, Desperate Housewives, CSI, Ugly Betty		

PLEASE STOP HERE FOR A MOMENT

Discussion:

- What are the most important genres for PSB?

¹² This genre was re-named "Drama" in the quantitative research

- *In which genres do respondents feel it is important to have content that is produced in the UK (and where is it less important)?*
- *Which programme types do they feel are currently done well by:*
 - a) *The main five PSB channels (BBC1, BBC2, ITV1, Channel 4 and five)*
 - b) *The free-to-air channels (all those available on Freeview or Freesat)*
 - c) *All the channels that you have to pay for (only available on Virgin or Sky) –*
Show stimulus on Freeview / pay TV channels (see Figure 24)
- *Which genres are most relevant to on-demand?*

Content types and the Internet

We are now going to think about content in relation to the web

36. On a scale of 1 to 10 (where 1 means not at all interested, and 10 means very interested), how interested are you in the idea of using the internet for the following purposes?

To access TV and radio programmes made in the UK

To access TV and radio programmes made outside the UK

PLEASE STOP HERE FOR A MOMENT

Make sure each of the content types is clear – especially:

- Other local information
- Extra content linked to existing TV and radio programmes

[Prompt with stimulus on Wikipedia, etc., see Figure 24]

37. Please could you score each of these other content areas in terms of how well (both in terms of quality and availability) you think they are done on the web (giving a score of 1 to 10 where 1 means 'very poor' and where 10 means 'very good')?

If you do not visit sites with this kind of content, please write 'Don't Know'.

- | | |
|--------------------------|--|
| <input type="checkbox"/> | Sport |
| <input type="checkbox"/> | Comedy Clips |
| <input type="checkbox"/> | Music |
| <input type="checkbox"/> | National and International News |
| <input type="checkbox"/> | News from your part of the UK |
| <input type="checkbox"/> | Other local information |
| <input type="checkbox"/> | Discussion groups and blogs on issues of the day |
| <input type="checkbox"/> | Serious factual material and information |
| <input type="checkbox"/> | Children's content and games |
| <input type="checkbox"/> | Educational material |
| <input type="checkbox"/> | Information on lifestyle, hobbies and interests |
| <input type="checkbox"/> | Extra content linked to existing TV and radio programmes and films |

PLEASE STOP HERE FOR A MOMENT

Discussion:

- Which of the content areas are well served by the internet, and in which areas do you use websites?

- Which websites do you use?
- What other things do you get from the internet? – prompt: what do you get from the internet that you do not get from television or radio? Which things do you most value from the web?
- Do you think the internet could play a useful role in delivering public service content?
- Do you expect any of these things to change in the future?
- What, if anything, does the internet do for society that is not covered by the aims we have talked about?
- What are the benefits and risks of the internet delivering public service content?

Prompt for the following:

- Search
- UGC
- Interactivity – for example being able to comment on an article or video
- Social Networking
- Recommendation engines (where products or services are scored by users – for example on Amazon and YouTube)
- Collaboration (through things like Wikipedia)
- Instant availability
- Issues of trust

Your relationship with the BBC

As part of this study we are talking to different people about various aspects of public service broadcasting. Your group is discussing the BBC.

We are going to discuss each of the BBC's services.

- Show stimulus on each service (see Figure 26).
- Explain each in turn
- When explaining local radio stations, give a specific example (e.g. BBC Radio Manchester)

38. Which of these BBC services are you aware of (please tick those you are aware of)?

39. Which of these BBC services do you regularly use (please tick those which you use at least once a month on average)?

Service	Q38 – Are aware of	Q39 – Use at least once a month
BBC ONE		
BBC TWO		
BBC THREE		
BBC FOUR		
CBBC and CBeebies		
BBC News 24		
BBC Parliament		
BBC Radio 1		
BBC Radio 2		
BBC Radio 3		
BBC Radio 4		
Radio Five Live		
BBC Digital Radio Stations (1xtra, FiveLive Sports Extra, 6 Music, BBC7, The Asian Network)		
BBC Local Radio Stations and BBC Nations Radio Stations (e.g. BBC Radio Scotland, Ulster / Radio Foyle, Cymru, nan Gaidheal)		
BBCi (Interactive television red button services)		
BBC Online (bbc.co.uk)		
BBC iPlayer		

PLEASE STOP HERE FOR A MOMENT

Explain the concept of the worth question:

- What you think it is WORTH to your household, not what you are willing to pay
- Please make sure you put something in each box: either a number, a zero, or don't know.

Read out the following narrative: there are two types of question in this section:

1. On the one hand we would like you to think about the value of the BBC and its individual services to your household (as CONSUMERS).
2. On the other hand we would like you to think about the value of the BBC and its individual services to society as a whole (as CITIZENS)

Question 40 asks you to tell us how much you think the BBC's services are worth to your household in pounds per month.

Your answers here will not affect the level of the licence fee.

40. Please imagine that people no longer had to pay the Licence Fee.

We are curious to know what you think each BBC service is worth to your household.

To help us understand this, could you tell us what you think each of these services is worth to your household (IN POUNDS / PENCE PER MONTH)?

For each service, please allocate an amount of pounds / pence or zero or don't know.

£ ____ . ____ p	BBC One	£ ____ . ____ p	BBC Two
£ ____ . ____ p	BBC Three	£ ____ . ____ p	BBC Four
£ ____ . ____ p	BBC children's channels (CBBC and Cbeebies)	£ ____ . ____ p	BBC News 24
£ ____ . ____ p	BBC Parliament	£ ____ . ____ p	BBC Radio 1
£ ____ . ____ p	BBC Radio 2	£ ____ . ____ p	BBC Radio 3
£ ____ . ____ p	BBC Radio 4	£ ____ . ____ p	Radio Five Live
£ ____ . ____ p	BBC Digital Radio Stations (1xtra, FiveLive Sports Extra, 6 Music, BBC 7, The Asian Network)	£ ____ . ____ p	BBC Local radio stations & BBC Nations radio stations (e.g. BBC Radio Scotland, Ulster / Radio Foyle, Wales Cymru, nan Gaidheal)
£ ____ . ____ p	BBC Online (bbc.co.uk)	£ ____ . ____ p	BBC iPlayer
£ ____ . ____ p	BBCi (Interactive television red button services)		

PLEASE STOP HERE FOR A MOMENT

Now we are going to consider the worth of the BBC services from the point of view of society as a whole.

- Explain WORTH to society per household - make clear that "worth" to your own household is about what you consume or want to have available, while "worth" to society could include services you don't want/need but which you think might be of benefit to other households/society as a whole
- Here are some things to consider that may help you. You've already put a value on what BBC services are worth to your household. Think about whether your household is typical of the country as a whole - do you think on balance you get more or less value from BBC services and by how much? And irrespective of whether you personally watch and hear BBC programmes or use the website, think about the extent to which there is value to the country as a whole of having BBC programmes and services of a type that no one else may make if the BBC did not exist.

41. Please imagine that people no longer had to pay the Licence Fee.

We are curious to know what you think each BBC service is worth to the country in terms of how it serves society as a whole.

To help us understand this, could you tell us what you think each of these services is worth per household based on how it serves society (**IN POUNDS / PENCE PER MONTH**)?

For each service, please allocate an amount of pounds / pence or zero or don't know.

<input type="text" value="£ ____ . ____ p"/>	BBC One	<input type="text" value="£ ____ . ____ p"/>	BBC Two
<input type="text" value="£ ____ . ____ p"/>	BBC Three	<input type="text" value="£ ____ . ____ p"/>	BBC Four
<input type="text" value="£ ____ . ____ p"/>	BBC children's channels (CBBC and Cbeebies)	<input type="text" value="£ ____ . ____ p"/>	BBC News 24
<input type="text" value="£ ____ . ____ p"/>	BBC Parliament	<input type="text" value="£ ____ . ____ p"/>	BBC Radio 1
<input type="text" value="£ ____ . ____ p"/>	BBC Radio 2	<input type="text" value="£ ____ . ____ p"/>	BBC Radio 3
<input type="text" value="£ ____ . ____ p"/>	BBC Radio 4	<input type="text" value="£ ____ . ____ p"/>	Radio Five Live
<input type="text" value="£ ____ . ____ p"/>	BBC Digital Radio Stations (1xtra, FiveLive Sports Extra, 6 Music, BBC 7, The Asian Network)	<input type="text" value="£ ____ . ____ p"/>	BBC Local radio stations & BBC Nations radio stations (e.g. BBC Radio Scotland, Ulster / Radio Foyle, Wales Cymru, nan Gaidheal)
<input type="text" value="£ ____ . ____ p"/>	BBC Online (bbc.co.uk)	<input type="text" value="£ ____ . ____ p"/>	BBC iPlayer
<input type="text" value="£ ____ . ____ p"/>	BBCi (Interactive television red button services)		

PLEASE STOP HERE FOR A MOMENT

Delivering the aims and the Schedules

We would now like to think about other providers besides the BBC that deliver content in line with the aims we spoke about earlier.

There is an argument that having a number of people, alongside the BBC, providing this type of content can produce various outcomes. These include:

- Choice to ensure you can choose high quality and the freshest programmes
- Access to a diverse range of views e.g. in news, current affairs
- Different approaches to comedy, drama, documentaries
- Giving people a range of UK programming – so you get to see programmes made in and about the UK, including your own area of the UK

42. We're curious to know your views on these outcomes that can result from having a number of providers, alongside the BBC, delivering content with the kind of public service aims we have been talking about.

To help us understand this, please score each one using a scale from 1 to 10, where 1 means not important at all and 10 means very important.

Choice to ensure you can choose high quality and the freshest programmes

Access to a diverse range of views e.g. in news, current affairs

Different approaches to comedy, drama, documentaries

Giving people a range of UK programming – so you get to see programmes made in and about the UK, including your own area of the UK

PLEASE STOP HERE FOR A MOMENT

Discussion:

- Thinking about the delivery / provision of programmes with the kinds of public service aims we have been talking about, how effectively do you think broadcasters are currently delivering these potential outcomes?
 - a) BBC
 - b) ITV
 - c) Channel 4
 - d) Five
 - e) Other digital channels (not including those provided by the BBC, ITV, Channel 4 or five).

Probe: How much of the content/programmes on Sky and other digital channels was originally shown on other channels?
- Which other media organisations are delivering them?
 - f) The web
 - g) Newspapers

- h) Film
- i) Other?

Before they answer this next question, reiterate that they need to think about programmes / content with the kinds of public service aims that we have been talking about.

43. What contribution do you think each of the following is currently making to the delivery of these outcomes?

Please score on a scale from 1 to 10 where 1 means a very small contribution and 10 means a very big contribution.

	BBC	ITV1	Channel 4	Five	Other digital channels (not inc digital channels from BBC, ITV, C4 or Five)	Other media (e.g. the web, newspapers, film)
Choice to ensure you can choose high quality and the freshest programmes						
Access to a diverse range of views e.g. in news, current affairs						
Different approaches to comedy, drama, documentaries						
Range of UK programmes - so you get to see programmes made in and about the UK, including your own area of the UK						

PLEASE STOP HERE FOR A MOMENT

44. Please rate how important you think it is to have other providers, alongside the BBC, delivering programmes in each of the following areas with the kinds of public service aims we have been talking about (considering the list of genres we discussed earlier).

Please score from 1 to 10 where 1 means 'not important at all to have providers other than the BBC' and 10 means 'very important to have providers other than the BBC'.

Made in the UK

Content Type	Important to have providers delivering content alongside the BBC
Sport	
Soaps and long-running Drama	
Other Drama	
Comedy	
Music	
Entertainment	
National and International News	
News from your part of the UK	
Other programming / content for your part of the UK	
Current Affairs	
Serious Documentaries / Subjects	
Film	
Children's	
Education	
Lifestyle	
Factual Formats and Reality	
Programmes from outside the UK	

PLEASE STOP HERE FOR A MOMENT

We would now like to give you some different TV schedules and get your reactions to them:

Show example schedules, on screen and on stimulus cards handed out to respondents (see Figure 27, Figure 28, Figure 29, Figure 30).

In the discussion make clear which schedules respondents are referring to.

For each of them:

- What do you think the major differences are?
- What impact would each of these schedules have on society?
- Is there anything worrying about any of these schedules?

Ask respondents to rank the schedules. **Emphasise that this is a ranking exercise not a score.**

45. Which of the schedules do you think would be best for you as a viewer, and for society as a whole? Please rank them in order – where 1st is the best, and 4th is the worst:

	Rank	
	For yourself	For society as a whole
Schedule A		
Schedule B		
Schedule C		
Schedule D		

PLEASE STOP HERE FOR A MOMENT

Read out below description of the future of PSB, and show narrative to respondents.

Show stimulus of the aims of PSB (see Figure 25).

Broadcasting has become more competitive since the time when the public service broadcasters were set up.

Then, the commercial PSBs (ITV, Channel 4 and five) found it easier to broadcast challenging programming (with the characteristics we outlined before) and programming for certain audiences (for example, the regions and children).

Now that there are more channels competing for revenue they are finding it harder to do this.

To carry on making these types of programming they may need some money to cover the additional costs.

It is likely that in five years' time changes to the broadcasting landscape will mean that each of these schedules would cost different amounts of money. We are curious to know if you feel differently if the money is taken into account.

- a) Schedule A would cost the country an extra £10 per household per year
- b) Schedule B would cost the country the same as now
- c) Schedule C would cost the country an extra £5 per household per year
- d) Schedule D would cost the country an extra £15 per household per year

Read Out:

Don't worry too much about how this extra money would be collected at the moment. (It could be through increased advertising costs (which would increase the price you pay for the goods you purchase) or the Licence Fee or general taxation or other funding e.g. National Lottery). It could be any of those. We'll discuss this a bit later. What's important to bear in mind for now is that there would be costs to individuals involved in providing some of these schedules. Think about what, if anything, you would be prepared to pay for.

The money would not be given to the BBC (because it is already funded directly through the Licence Fee).

46. Does this change your opinion on the best schedule(s) overall for yourself as a viewer and for society as whole? If so, how would you now rank them (in order – where 1st is the best, and 4th is the worst)?

	Rank	
	For yourself	For society as a whole
Schedule A		
Schedule B		
Schedule C		
Schedule D		

PLEASE STOP HERE FOR A MOMENT

Sum up the points from the previous discussion – prompting on the potential benefits and costs of multiple regulated providers of PSB, the other potential providers in the marketplace

Remind respondents that ITV1, Channel 4 and five currently have the legal responsibilities to provide PSB, as outlined earlier.

Reiterate that use of public money as follows would be a change from the current situation.

Thinking about these schedules, the costs they would incur, and the discussion we have just had...

47. How important do you think it is for ITV1, Channel 4 and Five to continue to be told to deliver public service content, alongside the BBC, in the future?

Please score on a scale of 1 to 10, where 1 means not important at all and 10 means very important.

ITV1	<input type="text"/>
Channel Four	<input type="text"/>
Five	<input type="text"/>

48. To what extent would you agree or disagree that public money should be invested so that ITV1, Channel 4 and Five can continue to deliver public service content alongside the BBC in future?

Please score on a scale of 1 to 10, where 1 means strongly disagree and 10 means strongly agree.

ITV1	<input type="text"/>
Channel Four	<input type="text"/>
Five	<input type="text"/>

Discussion

- Is it worth having regulation to ensure there are providers alongside the BBC delivering public service provision?
- Is it worth having the investment of public money to ensure there are providers alongside the BBC delivering public service provision?

PLEASE STOP HERE FOR A MOMENT

Alongside the things we have just been talking about, it is possible that other dedicated public service institutions could be created in the future. We would like to know what you think about these.

49. How important do you think these would be for society as a whole (on a scale of 1-10, where 1 means 'not important at all' and 10 means 'very important')?¹³

- A dedicated children's channel (transmitting UK content, including drama and factual content, to children, not from the BBC)
- A service that funds the creation of challenging content online (with all of the aims we have described before) [Use output from the earlier discussion on content types and the internet to help explain the likely shape of the PSP](#)
- English language services providing regional news for the different parts of England, and news for Wales, Scotland and Northern Ireland

PLEASE STOP HERE FOR A MOMENT

¹³ We have not reported the results from this question in the report because in the set-up to this question within the deliberative workshops it was not made clear to participants that these services would be instead of, rather than in addition to, current provision (for example, instead of children's or regional programming on ITV). Therefore the results were not considered a good guide to opinion.

Explain additional costs of these services and read narrative to respondents.

Just as with the more expensive schedules discussed before, it is likely that there would be some additional costs associated with these services.

Each of these services would cost an extra £2 per household per year

50. Do you think each of these services would be worth this extra cost to society (please answer yes or no)?¹⁴

- Dedicated children's service (transmitting UK content, including drama and factual, to children, not from the BBC)
- A service that funds the creation of challenging content online (with all of the aims we have described before)
- English language services providing regional news for the different parts of England, and news for Wales, Scotland and Northern Ireland

PLEASE STOP HERE FOR A MOMENT

Discussion

- *Do people feel these services would be better value than the more expensive schedules described above?*
- *What do they feel would best fulfil the aims of PSB – the more expensive schedules or the additional services?*
- *Would the creation of these services change their feelings towards what they would expect from the BBC, ITV, Channel 4 or Five?*
- *Would their ranking of the schedules change?*

¹⁴ We have not reported the results from this question in the report because in the set-up to this question within the deliberative workshops it was not made clear to participants that these services would be instead of, rather than in addition to, current provision (for example instead of children's or regional programming on ITV). Therefore the results were not considered a good guide to opinion.

Prompt on how broadcasting is currently funded: at the moment the BBC is the only broadcaster who receives money from the Licence Fee. Other broadcasters do get benefits of sorts, but this is much less direct.

51. Thinking about the more expensive schedules on ITV1, Channel 4 and Five, as well as the additional children's, online and regional news services, we are curious to know how you feel about the different potential ways in which they could be funded.

Please score each of these methods of funding on a scale of 1 to 10, where 1 means you would not at all want them to be funded in this way, and 10 means you would very much want them to be funded in this way¹⁵.

- A Government grant from general taxation
- A higher Licence Fee - with some money allocated to ITV1, Channel 4 or Five, or the additional services, **AND** an unaffected BBC
- The same Licence Fee - with some money allocated to ITV1, Channel 4 or Five, or the additional services, **AND** a less distinctive BBC schedule or one or more BBC services being dropped
- A general tax on all commercial broadcasters
- The National Lottery

THE END – THANK YOU

Discussion

- What do you think is good and bad about each type of funding?
- How would you feel about the Licence Fee being used in this way?
- Would it affect how you view the BBC / your relationship with the BBC if the Licence Fee was used in this way?
- Which other sources of funding might be suitable?

Thank and Close

¹⁵ For clarity in the quantitative questionnaire, the options for this question were amended as follows:

- A government grant from the general pool of taxation
- A higher BBC Licence Fee with some money allocated to ITV1, Channel 4 or Five AND an unaffected BBC
- The same BBC Licence Fee with some money allocated to ITV1, Channel 4 or Five AND less money for the BBC, which might affect what the BBC can do
- A general tax to be paid by all commercial broadcasters (that is all broadcasters other the BBC)
- The National Lottery

Appendix 3: Deliberative workshop stimulus

Figure 22: Stimulus for the public service obligations of the BBC

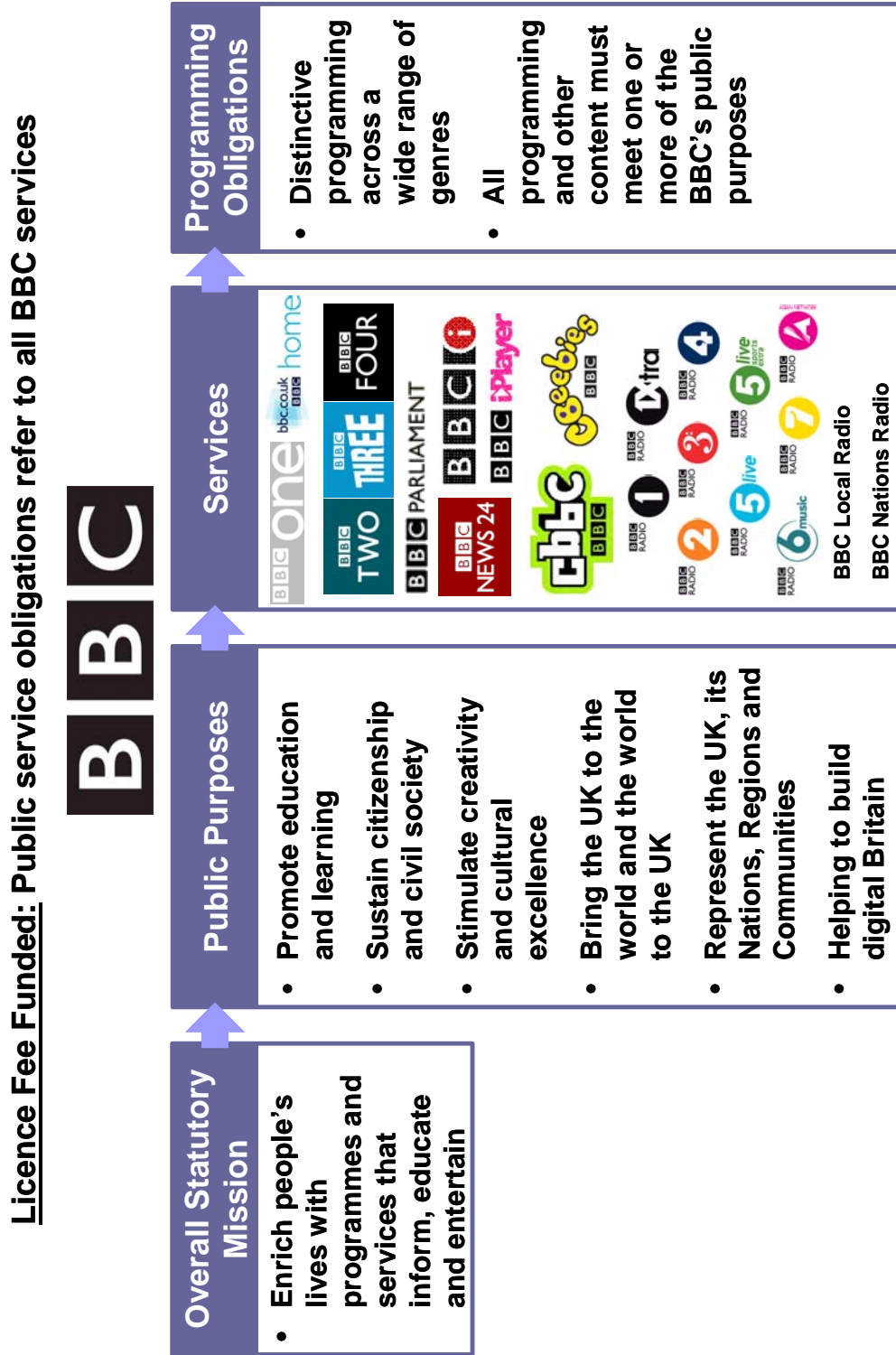


Figure 23: Stimulus for the public service obligations of the commercial PSBs

Advertiser Funded: Public service obligations refer only to the network channels, not to digital channels or the internet



Note: the programming obligations for the commercial PSBs were also discussed in the workshops

Figure 24: Stimulus for TV channels on different platforms, and websites¹⁶



¹⁶ It was made clear to participants that a selection of Freeview channels, pay TV channels and websites were shown on the stimulus. It was also made clear that the BBC channels available on Freeview also carry PSB obligations.

Figure 25: Stimulus for the aims of public service broadcasting

The aims of PSB

- **To increase our understanding of the world through news, information and analysis of current events and ideas**
- **To get people excited about arts, science and history and other factual topics**
- **To encourage people to learn**
- **To bring everybody together for shared experiences**
- **To make us aware of other cultures and points of view**
- **To celebrate UK culture and stories in areas such as drama, comedy, music and arts**

Figure 26: Stimulus for BBC Services



Figure 27: Stimulus for Schedule A – Current mix of PSB

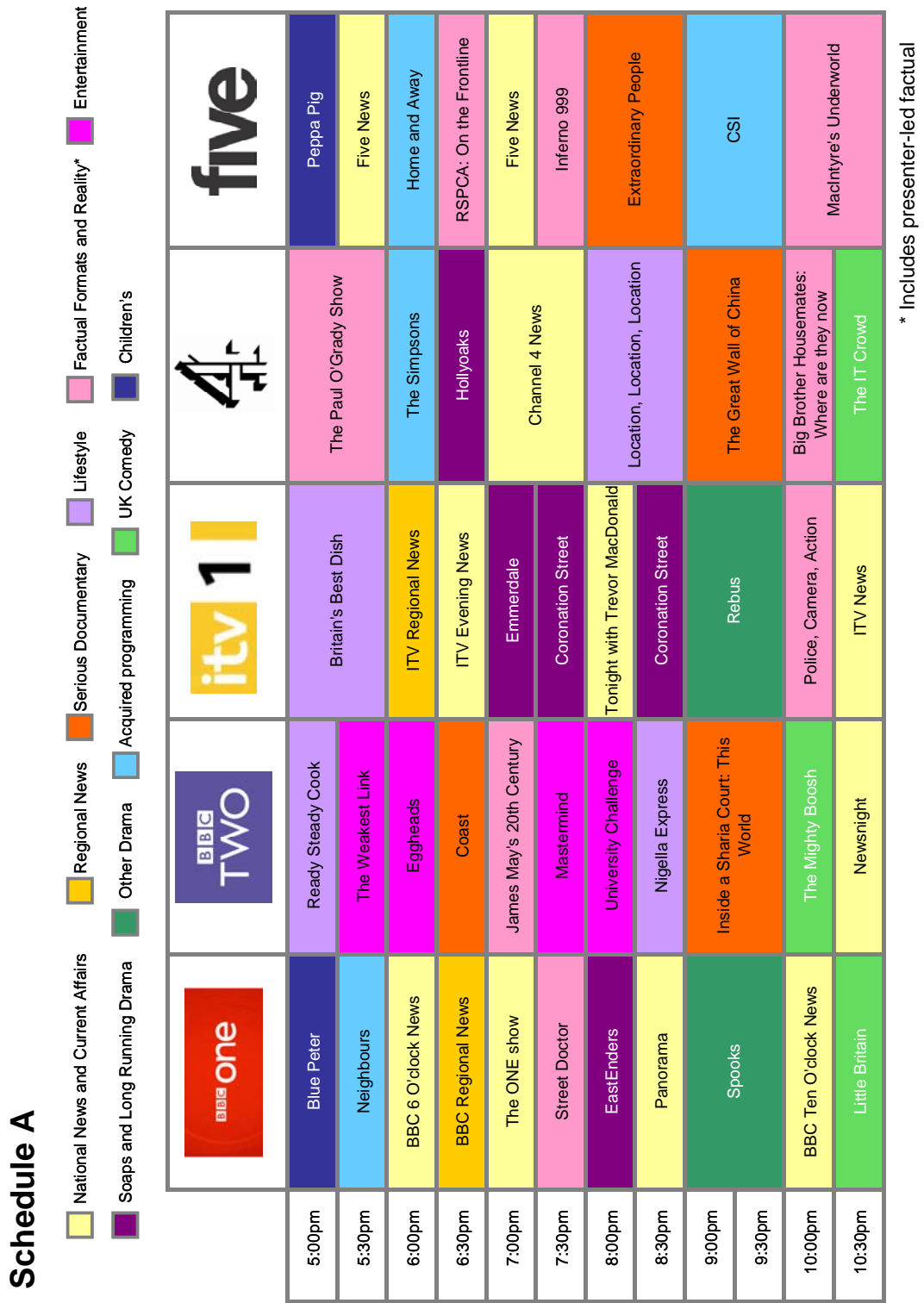


Figure 28: Stimulus for Schedule B: More commercially attractive

Schedule B

National News and Current Affairs
 Soaps and Long Running Drama
 Regional News
 Serious Documentary
 Lifestyle
 Factual Formats and Reality*
 Entertainment
 Acquired programming
 UK Comedy
 Children's

	BBC one	BBC TWO	itv 1	4	five
5:00pm	Blue Peter	Ready Steady Cook	Britain's Best Dish	The Paul O'Grady Show	Cooking the Books
5:30pm	Neighbours	The Weakest Link	Streetmate	The Simpsons	The Gadget Show
6:00pm	BBC 6 O'clock News	Eggheads	ITV Evening News	Hollyoaks	Home and Away
6:30pm	BBC Regional News	Coast	Emmerdale	Channel 4 News	RSPCA: On the frontline
7:00pm	The ONE show	James May's 20th Century	Coronation Street	How to Look Good Naked	David Beckham's Soccer USA
7:30pm	Street Doctor	Mastermind	Trinny and Susannah Undress	Location, Location, Location	Inferno 999
8:00pm	EastEnders	University Challenge	Coronation Street	Big Brother Housemates: Where are they now	Fifth Gear
8:30pm	Panorama	Nigella Express	Doc Martin	Friends	CSI
9:00pm	Spooks	Inside a Sharia Court: This World	Police, Camera, Action	Desperate Housewives	Paul Merton in China
9:30pm	BBC Ten O'clock News	The Mighty Boosh	Amir Khan: His story so far		
10:00pm	Little Britain	Newsnight			

* Includes presenter-led factual

Figure 29: Stimulus for Schedule C: Mid-way

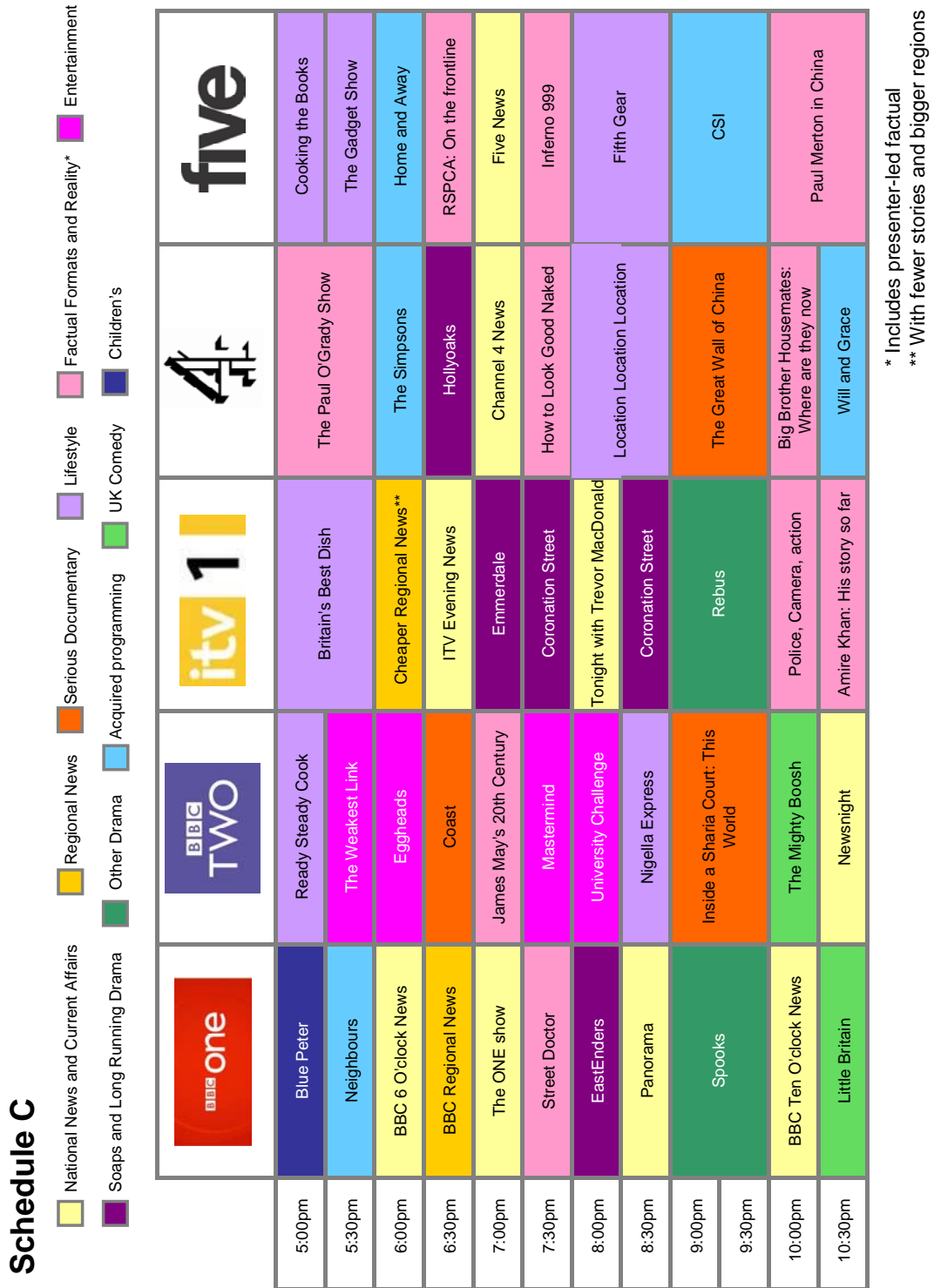
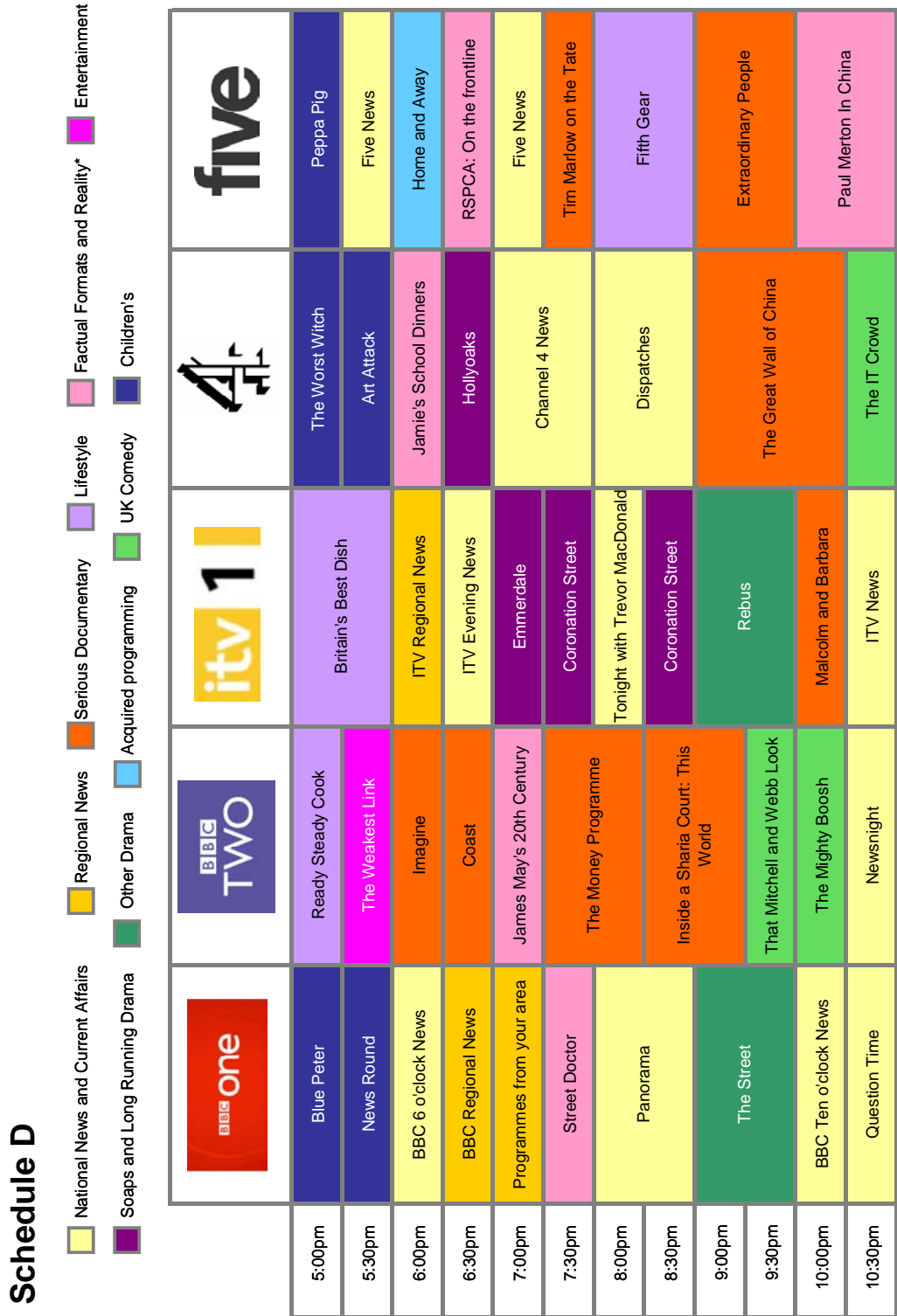


Figure 30: Stimulus for Schedule D: Less commercially attractive



* Includes presenter-led factual

Appendix 4: Quantitative survey questionnaire

The following questionnaire is the version used for the face-to-face survey. The online survey used the same questions.

The text in green indicates instructions to interviewers. The text in orange refers to options which were available to respondents but not shown on showcards in the face-to-face survey. These options were made explicit in the online survey.

Ipsos MORI Quantitative Questionnaire

Good morning/afternoon. My name is _____ (SHOW ID CARD) and I work for Ipsos MORI, an independent market research agency. We are conducting a national survey about your usage of television, radio and the internet. May I ask you a few questions about your TV viewing?

We are looking for particular groups of people, therefore I would first like to ask you some questions about yourself to make sure we interview a representative sample of the UK population. All information collected will be anonymous and not used for sales purposes.

Paper Screener

SA Do you or anyone in your household work in Market Research?

- Yes 1 *CLOSE*
- No 2 *CONTINUE*

SEX INTERVIEWER: CODE RESPONDENT'S GENDER

- Male..... 1 *CHECK*
- Female 2 *QUOTAS*

AGEG SHOWCARD A. Please can I just check which age band you fall into?

SP. DO NOT ALLOW DK/NULL

- Under 16..... 1 *CLOSE*
- 16-24 2)
- 25-34 3)
- 35-44 4) *CHECK*
- 45-54 5) *QUOTAS*
- 55-64 6)
- 65+ 7)

CIE Are you the chief income earner for your household?

SP. ALLOW REF. DO NOT ALLOW DK/NULL

- Yes 1
- No 2

INTERVIEWER: PLEASE WRITE IN Occupation details for the chief income earner

PLEASE PROBE FULLY, AS INFORMATION IS NEEDED TO CODE SOCIAL GRADE

Occupation _____
 Industry _____
 Qualifications/Apprenticeships _____
 No. responsible for _____
 No. in establishment _____

SOCG Interviewer, record social grade

SP. ALLOW REF

A..... 1)
B..... 2)
C1..... 3)
C2..... 4)
D..... 5)
E..... 6)

CHECK
QUOTAS

ENTERED FROM PAPER SCREENER

INTERVIEWER: PLEASE ENTER THE FOLLOWING INFORMATION FROM THE PAPER SCREENER

SEX INTERVIEWER: Record gender

Male
Female

AGEG INTERVIEWER: Record age band

16-24
25-34
35-44
45-54
55-64
65+

CIE INTERVIEWER: Record chief income earner

Yes
No

SOCG INTERVIEWER: Record social grade

A
B
C1
C2
D
E

MAIN QUESTIONNAIRE

1. Do you have a television at home?

SP.

- Yes
- No *[If no go to Q4]*

SHOWCARD B.

2. Who pays the Licence Fee in your household?

SP. ALLOW DK

- A. I do
- B. Somebody else pays
- C. I share the cost with others
- D. I am / we are given it for free because somebody in the home is over 75
- E. I don't have a licence

SHOWCARD C.

3. Please would you tell us what kind of TV reception you have in your home.

3a. First, your main set:

SP. ALLOW DK

- The five terrestrial channels only (i.e. BBC One, BBC Two, ITV1, Channel 4/S4C, Five)
- Freeview (i.e. digital TV accessed through a set-top box, or integrated into your TV, that you do not have to pay a subscription for)
- Sky Digital (i.e. digital TV through a satellite dish that you pay a monthly subscription for)
- Virgin Media (i.e. TV through a cable connection that you pay a monthly subscription for)
- Other, please specify

3b. ...and on any other sets? Please pick as many as apply.

MP. ALLOW DK

- The five terrestrial channels only (i.e. BBC One, BBC Two, ITV1, Channel 4/S4C, Five)
- Freeview (i.e. digital TV accessed through a set-top box, or integrated into your TV, that you do not have to pay a subscription for)
- Sky Digital (i.e. digital TV through a satellite dish that you pay a monthly subscription for)
- Virgin Media (i.e. TV through a cable connection that you pay a monthly subscription for)
- Other, please specify
- I do not have another TV set (SP)

4. Do you use the internet to access websites at all nowadays?

SP. ALLOW DK

- Yes
- No *[if no go to Q7]*

SHOWCARD D.

5. **What type of internet connection do you have at home?**

SP. ALLOW DK

- A. Broadband
- B. Narrowband or dial-up
- C. Internet connection at home but not sure which type
- D. I do not have internet access at home – I access it somewhere else

SHOWCARD E

6. **On average, how often would you say you use the internet for personal use (i.e. not for work-related purposes)?**

SP. ALLOW DK

- A. More than once a day
- B. Once a day
- C. 5-6 days a week
- D. 2-4 days a week
- E. Once a week
- F. 1-3 times a month
- G. Less often

SHOWCARD F.

7. **Thinking about an average day, how many hours would you say you spend...**

- Watching TV
- Listening to the radio – either at home, in the car, at work or elsewhere

SP. ALLOW DK

- A. None
- B. Less than 1 hour
- C. About 1 hour
- D. About 2 hours
- E. About 3 hours
- F. About 4 hours
- G. About 5 hours
- H. About 6 hours
- I. About 7 hours
- J. About 8 hours
- K. More than 8 hours

SHOWCARD G.

8. **Overall, what do you think of the following broadcasters?**

Please tell us your general impression of each one, giving a score of 1-10, where 1 means extremely unfavourable and 10 means extremely favourable.

READ OUT. SP PER BROADCASTER. ALLOW DK

RANDOMISE.

- General impression of the BBC
- General impression of ITV
- General impression of Channel 4
- General impression of five
- General impression of Sky

SHOWCARD H - Public service broadcasting.

Please can you read this definition of public service broadcasting.

INTERVIEWER: PLEASE ALLOW RESPONDENT ENOUGH TIME TO READ STIMULUS

(new screen)

9. I'm now going to read out some things that the public service broadcasters try to achieve. That is the BBC, ITV1, Channel 4 and Five.

Thinking about the needs of society as a whole, how important do you feel each aim is?

Please bear in mind this question is about how important you think it is that the BBC, ITV1, Channel 4 and Five should try to do these things.

It is NOT asking about how well you think they are doing these things already.

SHOWCARD I (IMPORTANCE SCALE)

Please give each aim a score of 1-10, where 1 means not important at all and 10 means very important

RANDOMISE ORDER. SP PER STATEMENT. ALLOW DK

READ OUT EACH STATEMENT

So, how important do you think it is for the BBC, ITV1, Channel 4 and Five

- A. To increase our understanding of the world through news and analysis of current events
- B. To get people interested in arts, science and history and other factual topics
- C. To encourage people to learn
- D. To bring everybody together for shared experiences – for example, on big national occasions like the World Cup or the Diana Concert
- E. To make us aware of other cultures and points of view
- F. To reflect life in the UK and UK culture

10. I'm now going to read out some of the ways public service broadcasters try to achieve these aims.

Thinking about the needs of society as a whole, how important do you feel each one is?

Please bear in mind this question is about how important you think it is that the BBC, ITV1, Channel 4 and Five should try to do these things.

It is NOT asking about how well you think they are doing these things already.

SHOWCARD I (IMPORTANCE SCALE)

Please give each a score of 1-10, where 1 means not important at all and 10 means very important.

RANDOMISE ORDER. SP PER STATEMENT. ALLOW DK

READ OUT EACH STATEMENT

So, how important do you think it is for the BBC, ITV1, Channel 4 and Five

- A. To show programmes that reflect life in the UK
- B. To show programmes about the different regions of the UK
- C. To show well made, high quality programmes
- D. To show entertaining programmes
- E. To be fair, balanced and not take sides, especially in news and current affairs programmes
- F. To be trustworthy
- G. To show programmes that have fresh ideas and try different approaches
- H. To show programmes that make people think
- I. To show programmes that are engaging and that people want to watch or listen to

11. How well do you think the following public service broadcasters are currently delivering the things we have just been talking about, and shown on these cards?

SHOWCARD J & K

Please take a moment to remind yourself of the aims that we just went through.

(new screen)

SHOWCARD L

Thinking about all these things together, please give an overall score of 1 to 10, for each broadcaster, where 1 means 'very poor' and 10 mean 'very good'.

READ OUT. SP PER BROADCASTER. ALLOW DK

RANDOMISE

- BBC
- ITV1
- Channel 4
- Five

(new screen)

SHOWCARD M: BBC services

12. This card shows you all the services provided by the BBC.

The BBC is funded by the Licence Fee. It is the only broadcaster that is funded in this way.

INTERVIEWER: POINT TO BBC LOCAL RADIO ON THE SHOWCARD.

AT [X] INSERT THE NAME OF THE LOCAL BBC RADIO STATION E.G. BBC RADIO NEWCASTLE, ETC.

BBC local radio means BBC Radio [XXX] in this area.

(new screen)

INTERVIEWER: PLEASE READ SLOWLY TO ENSURE RESPONDENT FULLY UNDERSTANDS THE QUESTION.

Please imagine that it has been decided to have a national vote on the future of the BBC and all its TV, radio, online and interactive services. Even if you do not pay the Licence Fee yourself, we would like to get your opinion.

The options are shown on this card. **SHOWCARD N: National vote options.**

I'm going to read out different prices for the Licence Fee. Thinking about the value of the BBC to society as a whole, please can you say whether you would vote for Option 1 or Option 2 at each price.

Please bear in mind the answers to this question will not be used to decide the Licence Fee – it has already been set up to 2012.

INTERVIEWER: DO NOT PROMPT ON THE CURRENT LEVEL OF THE LICENCE FEE

(new screen)

So, if the Licence Fee was <insert price> per month, would you vote for Option 1 or Option 2?

SP. ALLOW DK

- Option 1: Continue with the BBC as it is, but put the Licence Fee to £XXX per household per month
- Option 2: Close the BBC, stop all the BBC TV channels, radio services, online and interactive services, and stop charging the Licence Fee

And if the Licence Fee was <insert price> per month?

[Repeat question for each of the prices in a random order]

- a) £5.50
- b) £11.50
- c) £17.00
- d) £22.50
- e) £28.50
- f) £34.00
- g) £39.50
- h) £45.00

13. ASK Q13a TO THOSE WHO VOTED FOR OPTION 1 AND OPTION 2 IN QUESTION 12

a) In the last question, you said that you would continue with the BBC for £ [x] per month, but not £ [y] per month.

RULE = price X < Y

Could we ask you the highest price per month where you would still vote to keep the BBC open (option 1)?

NUMERICAL. ALLOW DK

Pounds Pence

ASK Q13b THOSE WHO VOTED FOR OPTION 1 THROUGHOUT QUESTION 12

b) In the last question, you said that you would continue with the BBC if the Licence Fee was at £45 per month.

RULE = price given must be greater than or equal to £45.

Could we ask you the highest price per month where you would still vote to keep the BBC open (Option 1)?

NUMERICAL. ALLOW DK

Pounds Pence

ASK Q13c THOSE WHO VOTED FOR OPTION 2 THROUGHOUT QUESTION 12

c) In the last question, you said that you would vote to close the BBC at each price.

Could we ask you the highest price per month, if any, where you would vote to keep the BBC open (option 1)?

NUMERICAL. ALLOW DK. ALLOW NONE.

Pounds Pence

(new screen)

At the moment, there are rules to say that the BBC, ITV1, Channel 4 and five must show a range of programmes with the public service aims we were talking about earlier.

Some people say that having more than one broadcaster showing these types of programmes means that there is more chance that we get the following things, as shown on this card. **SHOWCARD O.**

INTERVIEWER: GIVE RESPONDENT TIME TO READ THE SHOWCARD BEFORE ASKING THE NEXT QUESTION

(new screen)

14. Could you please choose which of these you think is the most important in broadcasting?

SP. ALLOW DK

- The opportunity to hear different points of view
- A choice of channels and programmes so that everyone can try to find something that appeals to them
- Higher quality programmes because of competition between broadcasters
- None of these

Now, we would like to get your views on the future of public service broadcasting.

SHOWCARD P Please take a moment to read this.

Please take your time.

INTERVIEWER: PLEASE GIVE RESPONDENT TIME TO READ.

(new screen)

SHOWCARD Q.

15. I am going to read out some statements about ITV1, Channel 4 and Five. To what extent do you agree or disagree that each of these broadcasters should continue to be made to show programmes with public service aims, alongside the BBC, in the future?

SP PER STATEMENT. ALLOW DK. RANDOMISE

READ OUT EACH STATEMENT

- a) ITV1 should be made to show programmes with public service aims
- b) Channel 4 should be made to show programmes with public service aims
- c) Five should be made to show programmes with public service aims

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

(new screen)

SHOWCARD R. Now please take a moment to read this showcard. Please take your time.

INTERVIEWER: PLEASE GIVE RESPONDENT TIME TO READ.

(new screen)

SHOWCARD Q.

16. With this in mind, to what extent do you agree or disagree that each of these broadcasters should receive public money so that they can show programmes with public service aims, alongside the BBC, in the future?

SP PER STATEMENT. ALLOW DK. RANDOMISE

READ OUT EACH STATEMENT

- a) ITV1 should receive public money
- b) Channel 4 should receive public money
- c) Five should receive public money

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

SHOWCARD S. Please take a moment to read this. Please take your time.

INTERVIEWER: GIVE RESPONDENT TIME TO READ THE SHOWCARD BEFORE ASKING THE NEXT QUESTION

(new screen)

SHOWCARD S.

17. With this in mind, which of these options do you prefer?

SP. ALLOW DK

- Allocate some of the Licence Fee to other broadcasters
- Use other ways to provide public money to other broadcasters
- Don't provide any public money at all to other broadcasters

(new screen)

18. Now, we are interested to know in which areas you think it is most important to have more than one broadcaster showing programmes made in the UK with the public service aims we have been talking about.

To remind yourself of these aims, please look again at showcards J and K.

SHOWCARD J & K: The of aims and characteristics of PSB.

(new screen)

In the future, it is possible that having more than one broadcaster showing these types of programmes could require public funding for ITV1, Channel 4 or five. This could be up to the equivalent of £15 per household per year.

So, thinking about the needs of society as a whole, and not just your favourite programmes, please pick up to five areas in which you think it would be most important to have MORE THAN ONE BROADCASTER showing programmes.

SHOWCARD T – GENRES

MP. UP TO FIVE ANSWERS. ALLOW DK/NULL

- **Children's** (e.g. Blue Peter, Peppa Pig, The Worst Witch)
- **Comedy** (e.g. Little Britain, Peep Show, The Mighty Boosh)
- **Current Affairs** (e.g. Dispatches, Tonight with Trevor Macdonald)
- **Drama** (e.g. Spooks, Wire in the Blood, The Fixer, Cranford)
- **Education** (e.g. 4Schools, Learning Zone)
- **Entertainment** (e.g. X Factor, Ant and Dec's Saturday Night Takeaway, Strictly Come Dancing)
- **Factual Formats and Reality** (e.g. Big Brother, Wife Swap, Ladette to Lady, Animal Rescue Squad)
- **Lifestyle** (e.g. Grand Designs, Gardener's World, This Morning, Fifth Gear, The Hotel Inspector)
- **Music** (e.g. Popworld, Later with Jools Holland)
- **National and International News** (e.g. News at Ten, 10 o'clock News)
- **News from your part of the UK** (e.g. Regional News programmes like South Today, Look North)
- **Other programming from your part of the UK** (e.g. Local factual programming)
- **Serious documentaries** (e.g. Life in Cold Blood, Bodyshock)
- **Soaps** (e.g. Coronation Street, Holby City, Hollyoaks)
- **Sport** (e.g. Six Nations, Champions League football)

ROTATED SHOWCARD

19. We are curious to know how you feel about the different possible ways in which funding could be provided to ITV1, Channel 4 and five in the future so that they can show programmes with the public service aims we have been talking about.

SHOWCARD U – FUNDING

Please score each of these methods of funding using a scale of 1 to 10, where 1 means extremely unfavourable and 10 means extremely favourable.

READ OUT EACH OPTION. SP PER OPTION. ALLOW DK

- A. A government grant from the general pool of taxation
- B. The National Lottery
- C. A higher Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - AND an unaffected BBC
- D. The same Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - AND less money for the BBC, which might affect what the BBC can do
- E. Give other benefits to ITV1, Channel 4 and Five e.g. discounts on payments they may need to pay to broadcast
- F. Allow ITV1, Channel 4 and five to show a few more minutes of advertising
- G. A general tax to be paid by all commercial broadcasters (that is all broadcasters other than the BBC)

SHOWCARD V.

20. Of these possible ways of providing funding to ITV1, Channel 4 and Five in future so they can show programmes with public service aims, which do you prefer?

Please select your most preferred option from this list.

SP. ALLOW DK

- A. A government grant from the general pool of taxation
- B. The National Lottery
- C. A higher Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - AND an unaffected BBC
- D. The same Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - AND less money for the BBC, which might affect what the BBC can do
- E. Give other benefits to ITV1, Channel 4 and Five e.g. discounts on payments they may need to pay to broadcast
- F. Allow ITV1, Channel 4 and five to show a few more minutes of advertising
- G. A general tax to be paid by all commercial broadcasters (that is all broadcasters other than the BBC)
- H. None of these

SHOWCARD W

21. I am now going to read you some statements and for each I will ask you whether you agree or not depending on your feelings towards the BBC, ITV1, Channel 4 and Five.

SP PER STATEMENT. ALLOW DK.

READ OUT EACH STATEMENT

RANDOMISE a – d

- a) I care a lot about the BBC and its programmes and services
- b) I care a lot about ITV1 and its programmes and services
- c) I care a lot about Channel 4 and its programmes and services
- d) I care a lot about Five and its programmes and services

RANDOMISE e – h

- e) The BBC belongs to the public
- f) ITV1 belongs to the public
- g) Channel 4 belongs to the public
- h) Five belongs to the public

RANDOMISE i – l

- i) I expect the BBC to provide programmes and services that appeal to everyone's tastes
- j) I expect ITV1 to provide programmes and services that appeal to everyone's tastes
- k) I expect Channel 4 to provide programmes and services that appeal to everyone's tastes
- l) I expect Five to provide programmes and services that appeal to everyone's tastes

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

SHOWCARD W

22. To what extent do you agree or disagree with the following statements about the BBC?

SP PER STATEMENT. ALLOW DK. RANDOMISE.

READ OUT EACH STATEMENT SLOWLY.

- a) Because the public pays for the BBC via the Licence Fee, I feel more strongly about the BBC, and its programmes and services than other broadcasters

- b) Because the public pays for the BBC via the Licence Fee, I care more about how the BBC spends this money than I do about how other broadcasters spend their income

- c) Because the public pays for the BBC via the Licence Fee, I feel the BBC should be more accountable for what it shows and what it does than other broadcasters

- d) Because the public pays for the BBC via the Licence Fee, I feel the BBC should provide more programmes that suit our tastes and interests than other broadcasters

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

Finally, just a few questions to help categorise your answers.

23. How many people - adults and children - live in your household, including yourself?

SP. ALLOW DK/REF

- 1
- 2
- 3
- 4
- 5
- 6 or more

ONLY ASK IF MORE THAN ONE PERSON IN HOUSEHOLD

24. How many children, aged 15 or under, live in your household?

SP. ALLOW DK/REF

- None
- 1
- 2
- 3
- 4
- 5
- 6 or more

ONLY ASK THOSE WITH CHILDREN AGED 15 OR UNDER IN HOUSEHOLD

25. What are the ages of the children in the household?

SP. ALLOW DK/REF

- 0-1
- 2-4
- 5-9
- 10-15

SHOWCARD X

26. Which of these best describes your current working status?

SP. ALLOW REF

- Working full time (30 hours+ per week)
- Working part time (8-29 hours per week)
- Working part time (less than 8 hours per week)
- Job seeking
- Not working
- Student
- Retired

SHOWCARD Y

27. Which of these ethnic groups do you consider yourself to belong to?

SP. ALLOW REF

- White – British
- White - Irish
- Any other White background
- Mixed – White and Black Caribbean
- Mixed – White and Black African
- Mixed – White and Asian

Any other mixed background
Black – Caribbean
Black – African
Any other Black background
Asian – Indian
Asian – Pakistani
Asian – Bangladeshi
Chinese
Other Asian Background
Any other ethnic background
Prefer not to say

29. Do you have any long-term illness, health problems or disability that limits your daily activities or the work you do? This includes problems which are due to old age.

SP. ALLOW DK/REF

Yes
No

SHOWCARD W

28. Finally, to what extent do you agree or disagree with the following statements?

SP PER STATEMENT. ALLOW DK. RANDOMISE

- I regularly buy products & services online
- The internet is an important part of my life
- I like to keep up with technology
- I participate in online communities/forums/blogs

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

29. Finally, could I please ask the first part of your postcode.

NB: Region / nation within UK (9 regions within England) - from Sampling data.

Appendix 5: Quantitative survey showcards

Showcard **A** Age

- 16-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

Showcard **B** Paying for the Licence Fee

- I do
- Somebody else pays
- I share the cost with others
- I am / we are given it for free because somebody in the home is over 75
- I don't have a licence

Showcard © TV at home

- **The five terrestrial channels only**
(i.e. BBC One, BBC Two, ITV1, Channel 4 / S4C, Five)
- **Freeview**
(i.e. digital TV accessed through a set-top box, or integrated into your TV, that you do not have to pay a subscription for)
- **Sky**
(i.e. digital TV through a satellite dish that you pay a monthly subscription for)
- **Virgin Media**
(i.e. TV through a cable connection that you pay a monthly subscription for)
- **Other – please state**

Showcard © Internet connection at home

- **Broadband**
- **Narrowband or dial-up**
- **Have an internet connection at home, but not sure which type**
- **I do not have internet access at home – I access it somewhere else**

Showcard  How often you use the internet on average

- More than once a day
- Once a day
- 5 – 6 days a week
- 2 – 4 days a week
- Once a week
- 1 – 3 times a month
- Less often

Showcard  Watching TV / listening to the radio per DAY

- None
- Less than 1 hour
- About 1 hour
- About 2 hours
- About 3 hours
- About 4 hours
- About 5 hours
- About 6 hours
- About 7 hours
- About 8 hours
- More than 8 hours

Showcard

Extremely
unfavourable

1 2 3 4 5 6 7 8 9 10

Extremely
favourable

Showcard Public service broadcasting

- Public service broadcasting refers to TV and radio programmes and services that are made for the benefit of society as a whole.
- This means programming that can change the way we see the world; or teach us things; or help us to see people in a new light; or inform us about the world and the UK; or enrich UK culture.
- There are rules to say that the BBC, ITV1, Channel 4 and Five must provide public service broadcasting, though their responsibilities vary.
- For the BBC, these rules apply to all its services (TV, radio and online). For ITV1, Channel 4 and Five, these rules only apply to programmes on TV.

Showcard **I**

Not important
at all

1 2 3 4 5 6 7 8 9 10

Very
important

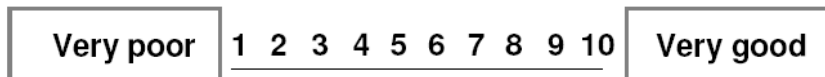
Showcard **J** The aims of public service broadcasting

- To increase our understanding of the world through news and analysis of current events
- To get people interested in arts, science and history and other factual topics
- To encourage people to learn
- To bring everybody together for shared experiences – e.g. on big national occasions like the World Cup and the Diana Concert
- To make us aware of other cultures and points of view
- To reflect life in the UK and UK culture

Showcard The characteristics of public service broadcasting

- To show programmes that reflect life in the UK
- To show programmes about the different regions of the UK
- To show well-made, high quality programmes
- To show entertaining programmes
- To be fair, balanced and not take sides
- To be trustworthy
- To show programmes that have fresh ideas and try different approaches
- To show programmes that make people think
- To show programmes that are engaging and that people want to watch or listen to

Showcard



Showcard BBC Services

All funded by the Licence Fee



Showcard National vote options

Option 1

Continue with the BBC as it is, but put the Licence Fee to [£X] per month

Option 2

Close the BBC, stop all the BBC TV channels, radio services and internet services, and stop charging the Licence Fee

Showcard Possible Outcomes

1. The opportunity to hear different points of view
2. A choice of channels and programmes so that everyone can try to find something that appeals to them
3. Higher quality programmes because of competition between broadcasters
4. None of these

Showcard The Future of Public Service Broadcasting

- ↘ At the moment, the BBC, ITV1, Channel 4 and Five must all show a range of programmes with public service aims.
- ↘ The BBC is funded by the Licence Fee.
- ↘ ITV1, Channel 4 and Five earn money through advertising.
- ↘ In the future, ITV1, Channel 4 and Five might find it harder to keep showing the same mix of programmes with public service aims as they do now.
- ↘ This is because some of these programmes tend to make less money.
- ↘ If this happens, ITV1, Channel 4 and Five could show:
 - less current affairs
 - less serious documentary
 - less regional news
 - less one-off UK drama
 - less children's programmes
- ↘ The BBC's mix of programmes would be unaffected.

Showcard 

Strongly Agree

Agree

Neither Agree nor Disagree

Disagree

Strongly Disagree

Showcard  **The future of Public
Service Broadcasting**

- **To keep showing the same mix of programmes with public service aims as they do now, ITV1, Channel 4 and Five could need public money.**
- **This could be up to the equivalent of an extra £15 per household per year overall.**

Showcard

The BBC is funded by the Licence Fee. This funds BBC activities, including on television, on radio, on the internet and its interactive services.

One possible way of providing public money to other broadcasters in future is to allocate some of the Licence Fee to them.

➤ On the one hand, this would mean other broadcasters could be required to show some programmes with public service aims.

➤ On the other hand, this could reduce the funding that the BBC receives and therefore affect what the BBC can do.

There are also other ways where other broadcasters could receive funding without affecting the BBC. e.g. allowing broadcasters to show a few more minutes of advertising or giving them other benefits such as discounts on payments they may need to pay to broadcast.

With this in mind, which of these options do you prefer?

1. Allocate some of the Licence Fee to other broadcasters
2. Use other ways to provide public money to other broadcasters
3. Don't provide any public money at all to other broadcasters

Showcard Different types of programming

National and International News	e.g. News at Ten, 10 o'clock News
Current Affairs	e.g. Dispatches, Tonight with Trevor Macdonald
Music	e.g. Popworld, Later with Jools Holland
Children's	e.g. Blue Peter, Peppa Pig, The Worst Witch
Serious Documentaries	e.g. Life in Cold Blood, Bodys shock
Lifestyle	e.g. Grand Designs, Gardener's World, This Morning, Fifth Gear, The Hotel Inspector
Factual Formats and Reality	e.g. Big Brother, Wife Swap, Ladette to Lady, Animal Rescue Squad
Education	e.g. 4Schools, Learning Zone
Soaps	e.g. Coronation Street, Holby City, Hollyoaks
Drama	e.g. Spooks, Wire in the Blood, The Fixer, Cranford
Sport	e.g. Six Nations, Champions League football
Entertainment	e.g. X Factor, Ant and Dec's Saturday Night Takeaway, Strictly Come Dancing
Comedy	e.g. Little Britain, Peep Show, The Mighty Boosh
News from your part of the UK	e.g. Regional News programmes like South Today, Look North
Other programming from your part of the UK	e.g. Local factual programming

Showcard Possible funding methods 1

1. A government grant from the general pool of taxation
2. The National Lottery
3. A higher Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - AND an unaffected BBC
4. The same Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - AND less money for the BBC, which might affect what the BBC can do
5. Give other benefits to ITV1, Channel 4 and Five e.g. discounts on payments they may need to pay to broadcast
6. Allow ITV1, Channel 4 and Five to show a few more minutes of advertising
7. A general tax to be paid by all commercial broadcasters (that is all broadcasters other than the BBC)

Showcard Possible funding methods 2

1. A government grant from the general pool of taxation
2. The National Lottery
3. A higher Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - AND an unaffected BBC
4. The same Licence Fee
 - with some money allocated to ITV1, Channel 4 or Five
 - AND less money for the BBC, which might affect what the BBC can do
5. Give other benefits to ITV1, Channel 4 and Five e.g. discounts on payments they may need to pay to broadcast
6. Allow ITV1, Channel 4 and Five to show a few more minutes of advertising
7. A general tax to be paid by all commercial broadcasters (that is all broadcasters other than the BBC)
8. None of these

Showcard 

Strongly Agree

Agree

Neither Agree nor Disagree

Disagree

Strongly Disagree

Showcard  **Working Status**

- Working full time (30+ hours per week)
- Working part time (8-29 hours per week)
- Working part time (less than 8 hours per week)
- Job seeking
- Not working
- Student
- Retired

Showcard Ethnicity

WHITE

- British
- Irish
- Any other white background

MIXED

- White and black Caribbean
- White and black African
- White and Asian
- Any other mixed background

ASIAN OR ASIAN BRITISH

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

BLACK OR BLACK BRITISH

- Caribbean
- African
- Any other black background

OTHER ETHNIC GROUP

- Any other