

**BBC's response to the Department of Culture,
Media and Sport's Green Paper:
*BBC Charter Review***

Audience appendix

The BBC and its audiences

1. Usage of BBC services

Over this Charter period, usage of the BBC has remained high: almost all of the UK uses the BBC each week, for around 18 hours on average

2. Views on BBC content

This is directly connected to the public's high appreciation of the quality of BBC content

3. Views on the BBC's impact

This is also because of the extent of the distinctive impact that BBC content makes in informing, educating and entertaining the public

4. Views on the BBC overall

The time people spend with the BBC, coupled with their appreciation of the content and its impact, has meant that support for the BBC has risen over this Charter period

5. Views on the licence fee

Likewise, while no form of taxation is universally popular, there has also been an increase in public backing for the licence fee as the means of funding the BBC and willingness to pay for the BBC is strong

6. Challenges the BBC faces

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The public's usage of BBC services

Over this Charter period, usage of the BBC has stayed strong despite increasing media choice

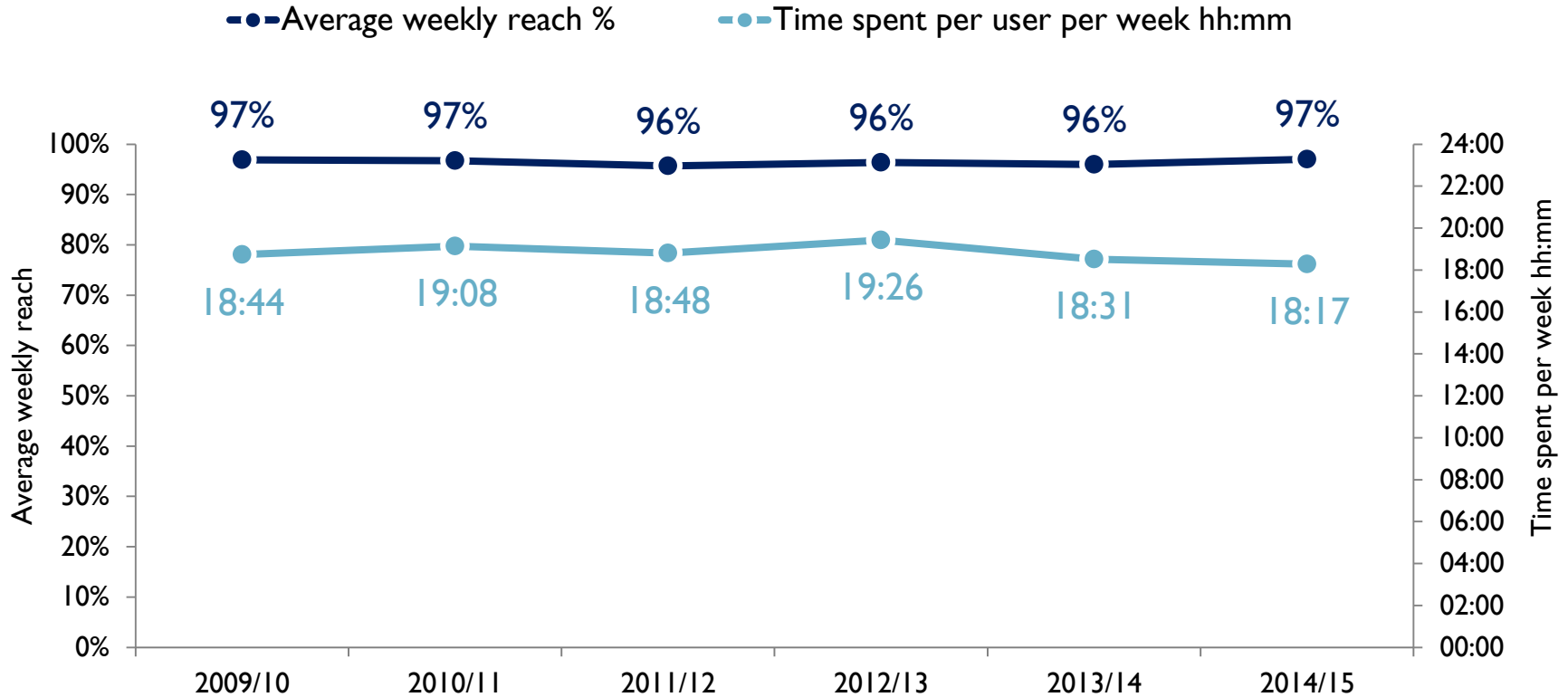
- 99% of UK households use the BBC each week
- And over the last six years almost all of UK adults (97% of UK adults) have used the BBC on a weekly basis, with these audiences spending a considerable amount of time with BBC services (over 18 hours per week, on average)
- The public consumes the BBC across multiple platforms:
 - Over 80% of the TV set-owning population watch BBC TV overall each week
 - Two-thirds of all adults listen to BBC Radio each week
 - Half of all adults use BBC Online each week (61% of online adults), and it is the only UK-owned website in the top five most-used websites in the UK
- There are millions of different BBCs: each viewer, listener and user makes up their own BBC from the variety of services on offer

In the UK the BBC reaches 99% of households each week



And continues to reach almost all of the adult population on a weekly basis

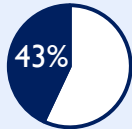
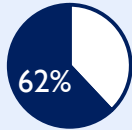
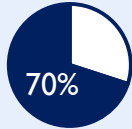
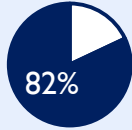
Pan-BBC reach and time spent per week



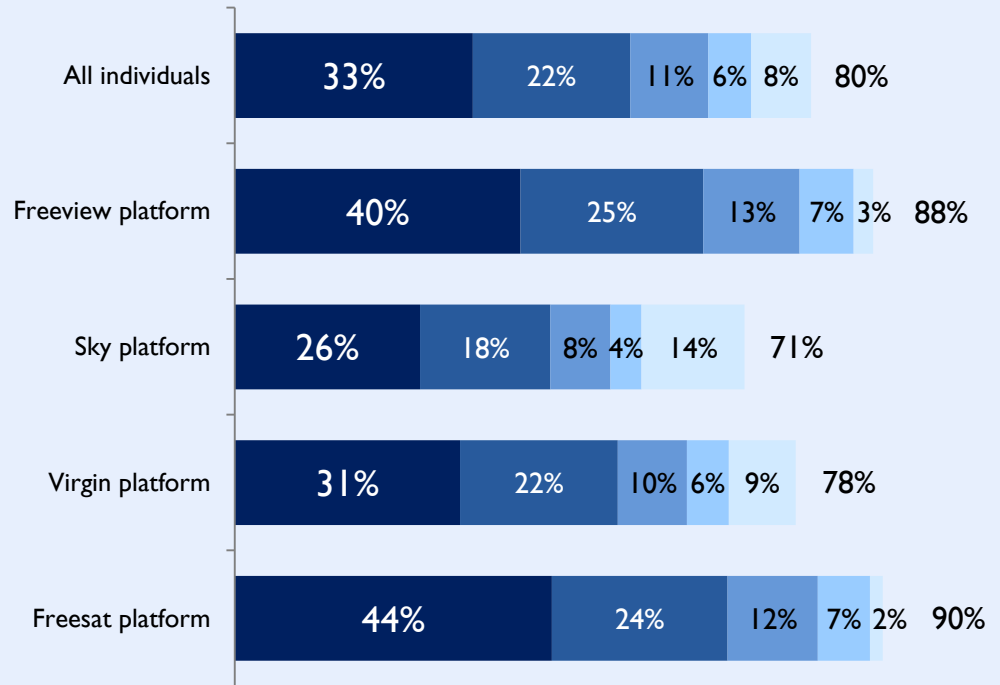
The BBC brings high quality content to a broad range of people across platforms:

Via TV

BBC TV reaches over eight out of ten people in the UK each week



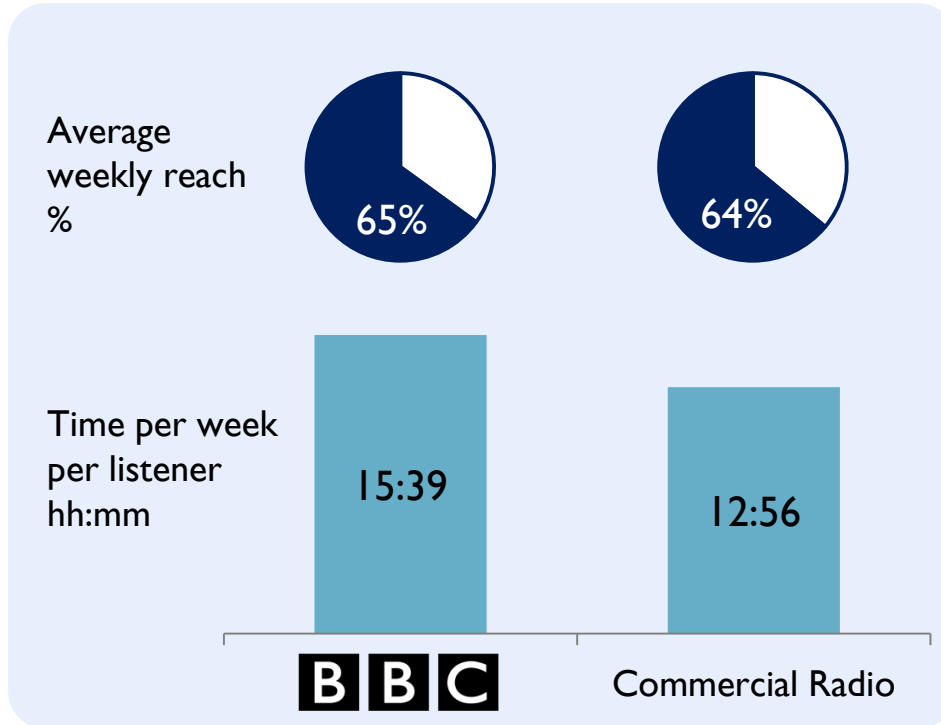
BBC TV is the most watched portfolio across all platforms



The BBC brings high quality content to a broad range of people across platforms:

Via Radio

BBC Radio and Commercial Radio have a similar reach though BBC Radio is listened to more

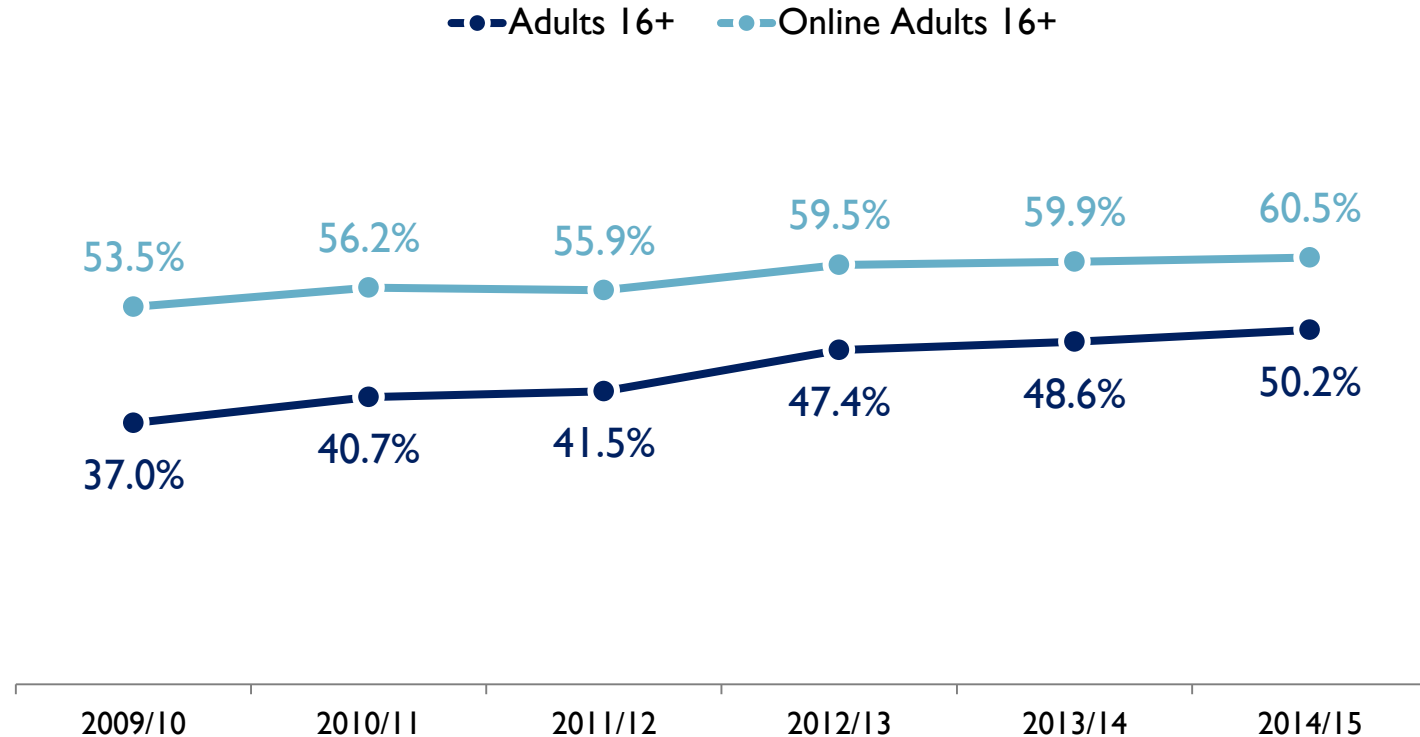


The most listened-to radio stations in the UK come from the BBC



The BBC brings high quality content to a broad range of people across platforms:
Via Online – half of all UK adults and 61% of online adults use BBC Online each week

BBC Online reach per week



The BBC brings high quality content to a broad range of people across platforms:

Via Online

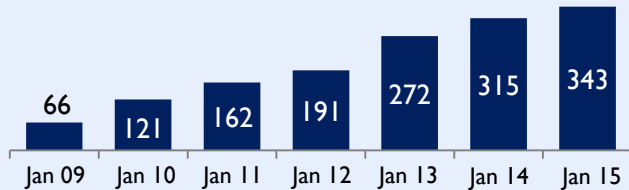
The BBC both keeps pace with and leads audience behaviour

90m BBC apps downloads since launch



BBC iPlayer

BBC iPlayer TV and radio requests (millions)



BBC Online is the only British-owned website in the top five most-visited sites in the UK¹

1. Google
2. BBC
3. facebook
4. amazon
5. Microsoft

That said, BBC Online has a very small share of time spent online in the UK²



¹ iStats Digital Analytix; BBC Digital Analytix; 1. comScore MMX Multiplatform, UK, Average Unique Visitors, [P] BBC Sites, [P] Google Sites, [P] Facebook, [P] Amazon Sites, [P] Microsoft Sites, Jan-June 2015;

² . comScore MMX Multi-Platform, UK, Average Total Minutes, [P] BBC Sites, [P] Facebook, [M] Google, [M] YouTube, [P] Microsoft Sites, Jan-June 2015

People's usage of the BBC across platforms means that the BBC is central to day-to-day life in the UK



And offers something different for every household

From a sample of **1,038** households, Kantar Media counted **825** different combinations of BBC services used in a week



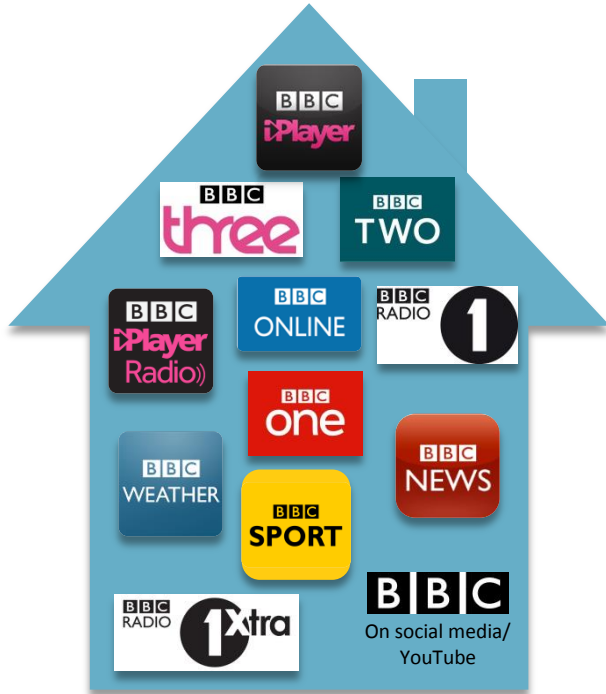
791 households used their own unique combination that no other household in the sample used

 = 10 households

No more than **3%** of households used the same combination of BBC services



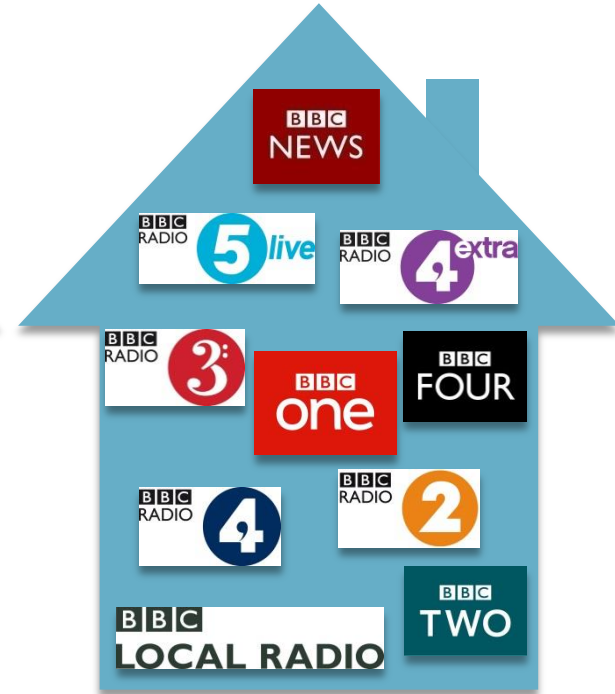
Almost every household uses a different group of services



Households of
16-29s



Households with
children aged 0-5



Households of
65+

Eight out of ten UK adults consume BBC News each week but how they access BBC News across the range of output is very different

From a sample of **2,395** BBC News consumers, Kantar Media counted...

1,384

different combinations of BBC News output used in a week

1,183

BBC News consumers used their own unique combination that no-one else in the sample used

No more than

3%

of BBC News consumers used the same combination of BBC News output.

The most common combination was BBC Six o'clock News and BBC Regional News at 18:30

The BBC and its audiences in the UK

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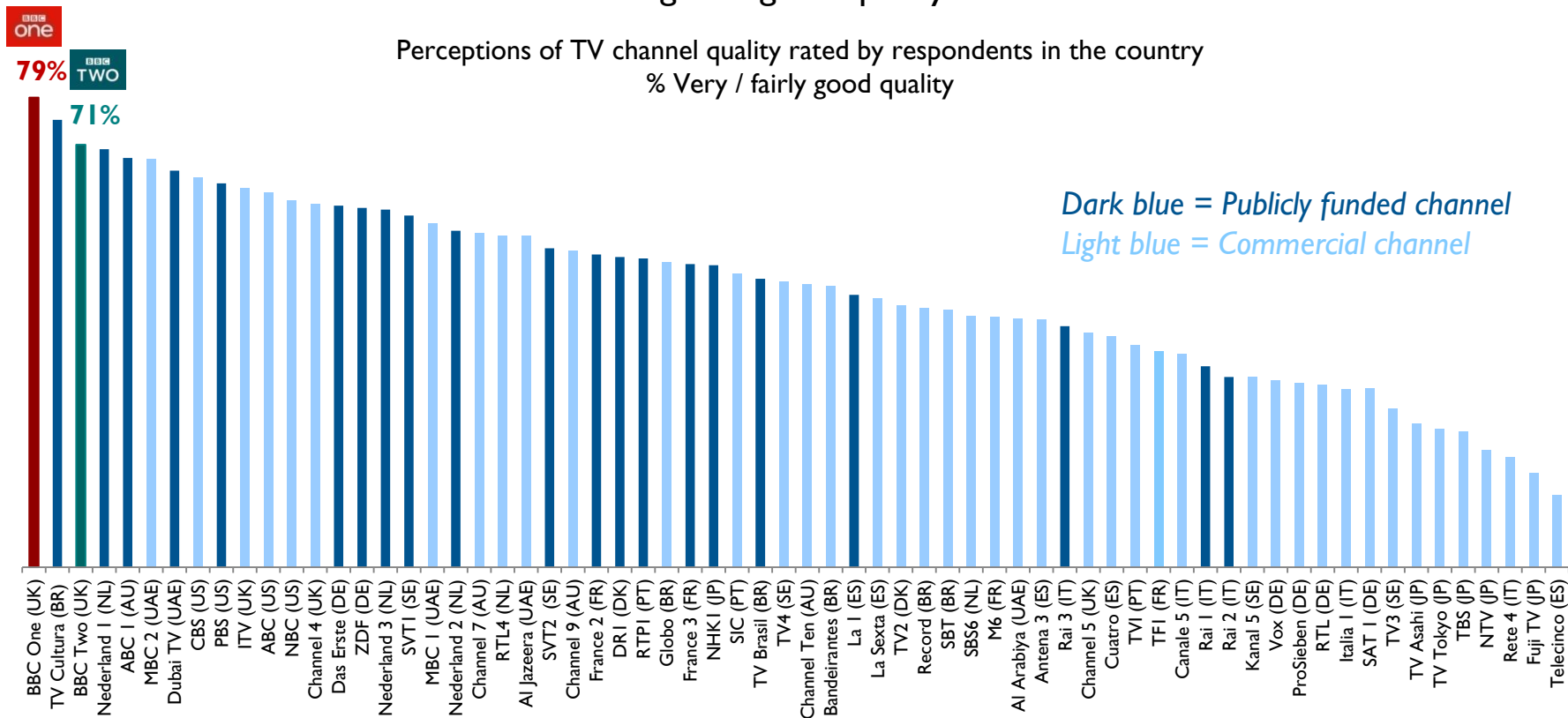
The public's views on BBC content

The public's high usage of the BBC is directly connected to their high appreciation of the quality and distinctiveness of BBC content

- The BBC emerges as a global leader on quality – in an international survey of 14 countries, BBC One was rated highest out of 66 major TV channels
- Perceptions of the quality of BBC content have improved over the Charter period
- And views on the distinctiveness of BBC content have also increased
- In particular, BBC One's scores for showing fresh and new TV programmes have been rising consistently: from 65% in 2010/11 to 72% in 2014/15
- Ofcom data shows that BBC One or BBC Two come top for delivering all but one of the public service broadcasting (PSB) purposes and characteristics – including overall quality and distinctiveness

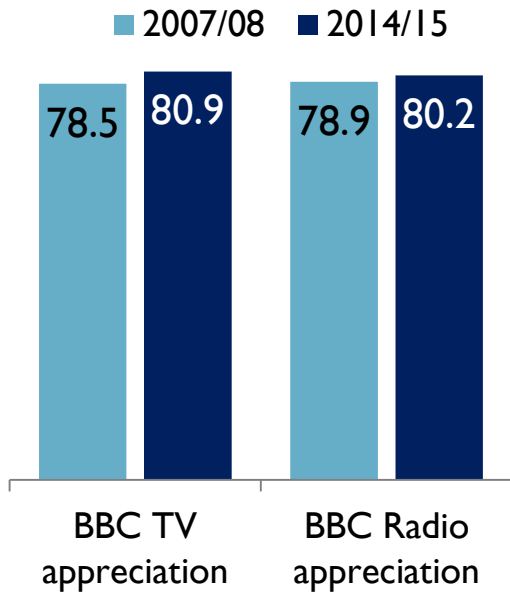
International research shows that the UK is a leader on overall TV quality, with BBC One receiving the highest quality score

Out of 66 channels, BBC One received the highest quality score of all – with 79% of UK adults rating it as good quality. BBC Two came third



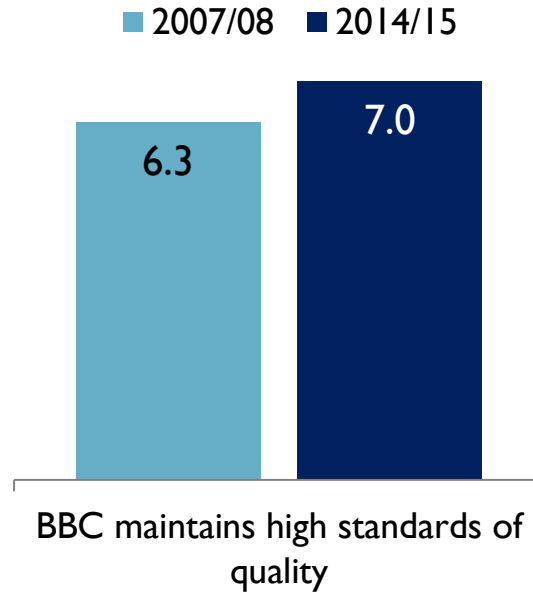
Perceptions of the quality and distinctiveness of BBC content have increased over the Charter period

Average appreciation score (AI) /100

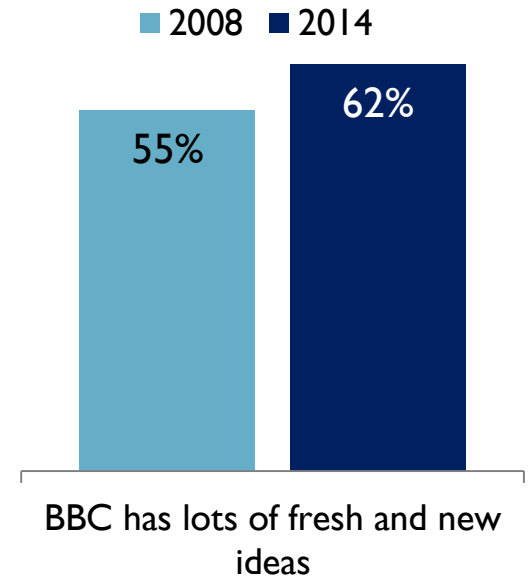


Mean /10

1 = strongly disagree; 10 = strongly agree

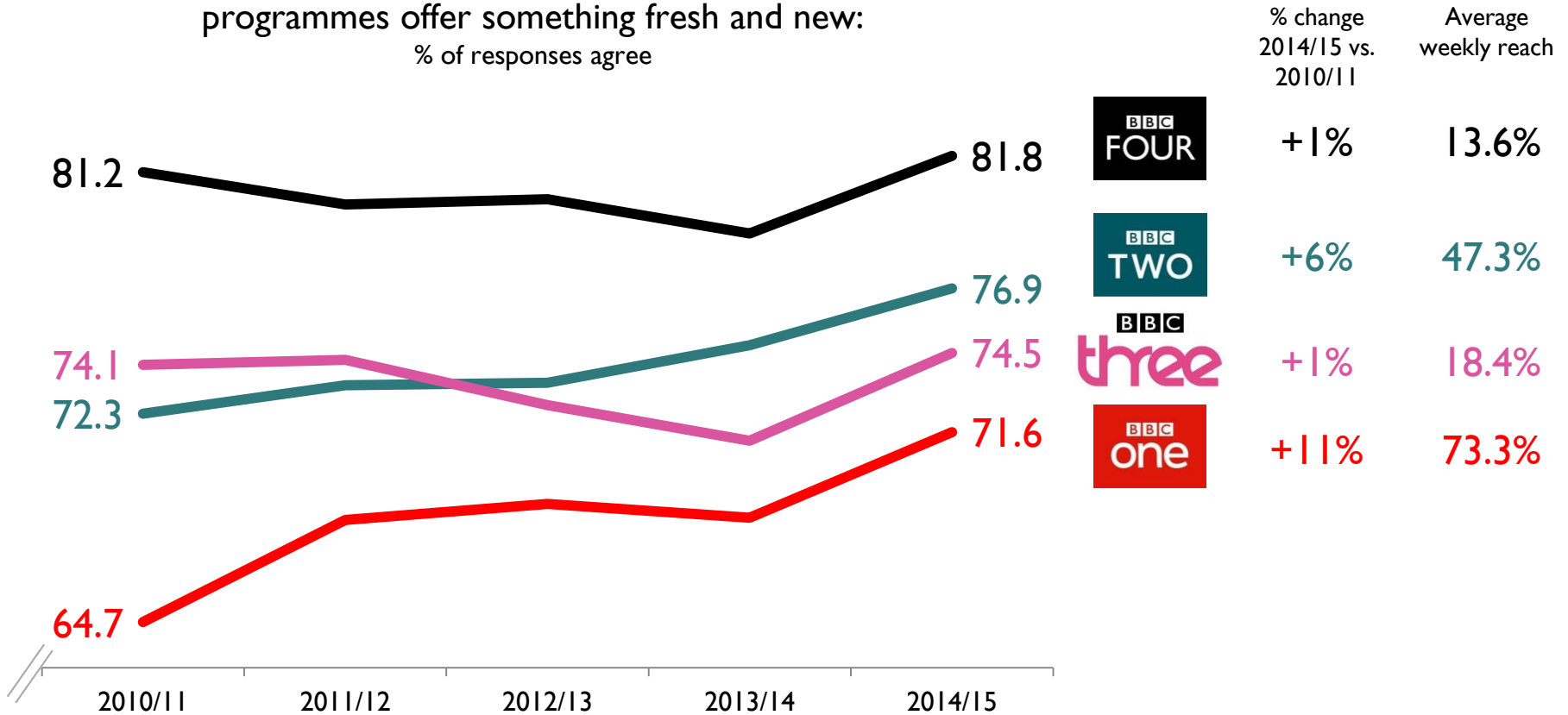


Agree %



BBC One's scores for showing fresh and new TV programmes have been rising consistently

Audience ratings on whether they feel individual programmes offer something fresh and new:
% of responses agree



Ofcom data shows that BBC One or BBC Two come top for delivering virtually all of the PSB purposes and characteristics – including overall quality and distinctiveness

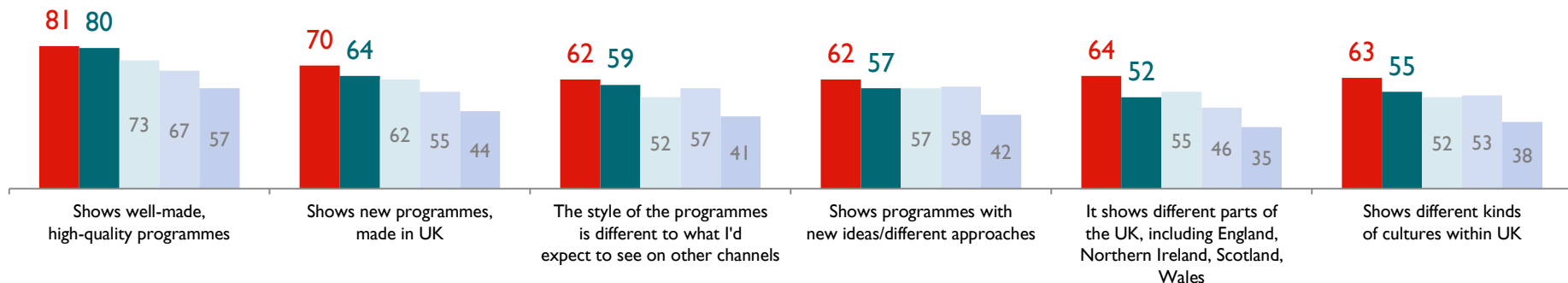
Public perceptions of the delivery of PSB purposes and characteristics

% of regular viewers to the channel overall rating 7, 8, 9 or 10 out of 10 for delivery



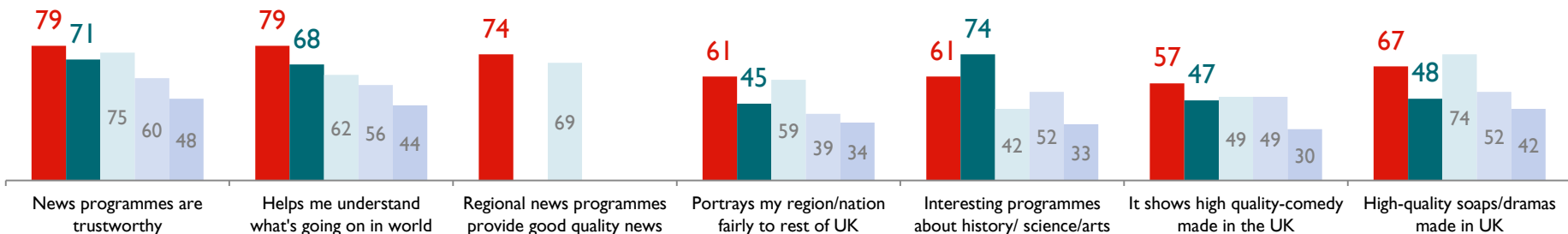
When viewers rate the channel overall, BBC One leads on distinctiveness

BBC One leads on showing different cultures



BBC One leads for informing people

The BBC leads on factual and comedy but comes just behind ITV for soaps/drama



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The public's views on the BBC's impact

The BBC has a considerable impact across all parts of its mission to *Inform, Educate and Entertain*

- Evidence indicates that the impact of the BBC for the UK public is special compared with what publicly funded broadcasters in other countries and the commercial PSBs in the UK deliver
- In international studies where audiences rate the main publicly funded and commercial channels in their country, BBC One emerges highest for helping people to learn new things and joint highest for helping people understand what is happening in the world and their country today
- Further, BBC television has greater impact than commercial PSBs with more BBC One viewers and BBC Two viewers reporting that they have learned something new as result of watching the channel compared with ITV viewers and Channel 4 viewers respectively

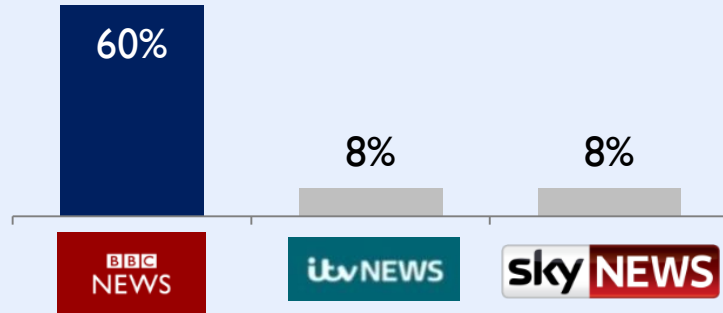
Inform: The BBC helps people to understand democracy and builds citizenship

BBC News helps citizens understand big issues



BBC News is ahead of competitors for the best election coverage

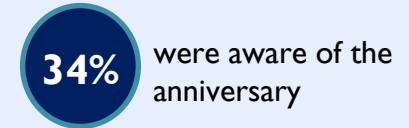
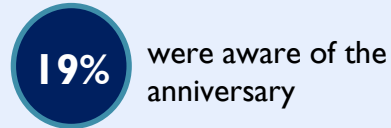
Please name ONE of these channels / stations / newspapers / websites from the following list that you think is BEST for news coverage of the UK General Election campaign?



Democracy Day on the BBC marked the 750th anniversary of England's first Parliament. BBC content helped awareness almost double overnight

The day before Democracy Day
Monday, 19 January

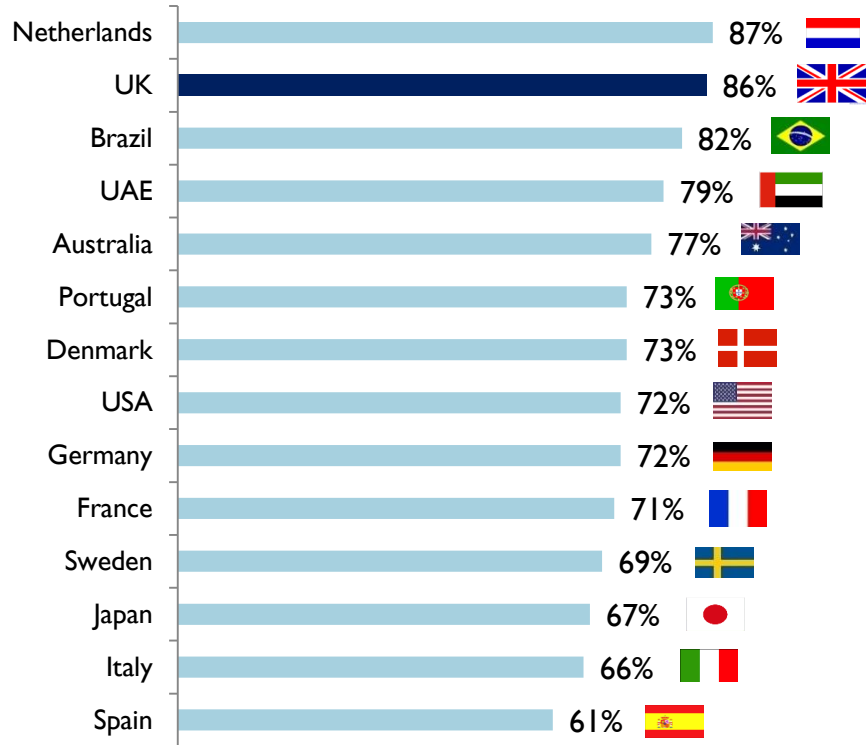
The day after Democracy Day
Wednesday, 21 January



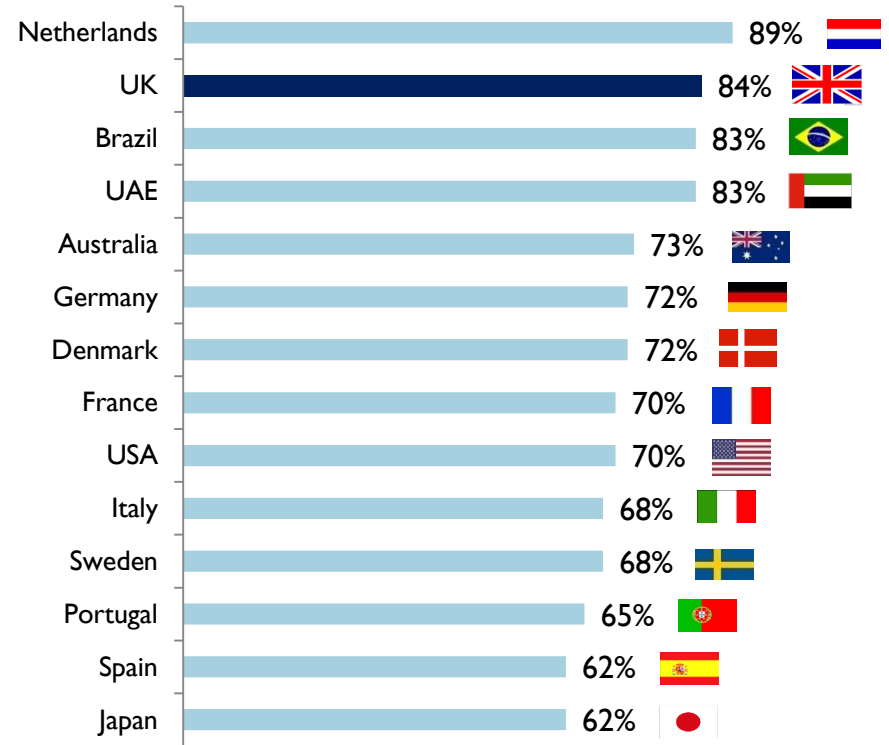
82% of those aware the day after heard about it from the BBC

The UK is a leader in providing TV programmes that help people to understand what is happening in their country and in the world today – coming second out of 14 countries

To what extent do you feel that television overall in [your country] provides programmes that help you to understand **what is going on in [your country] today?**
% Very / fairly helpful



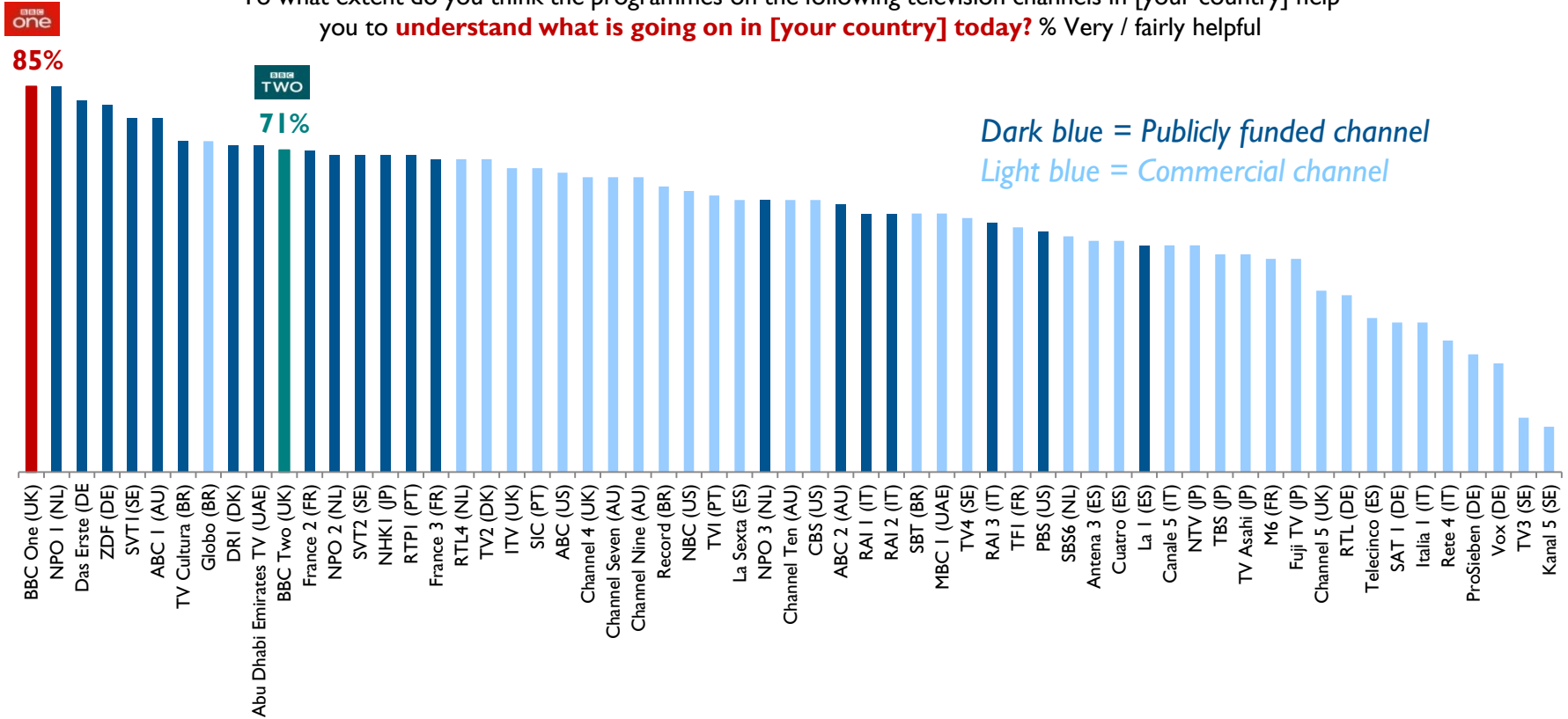
To what extent do you feel that television overall in [your country] provides programmes that help you to understand **what is going on in the world today?**
% Very / fairly helpful



The BBC is instrumental in this – out of 61 channels, BBC One received the joint highest score for helping people understand what is happening in their country

Perceptions of the extent to which TV channels help people understand what is happening in their country rated by respondents in the country

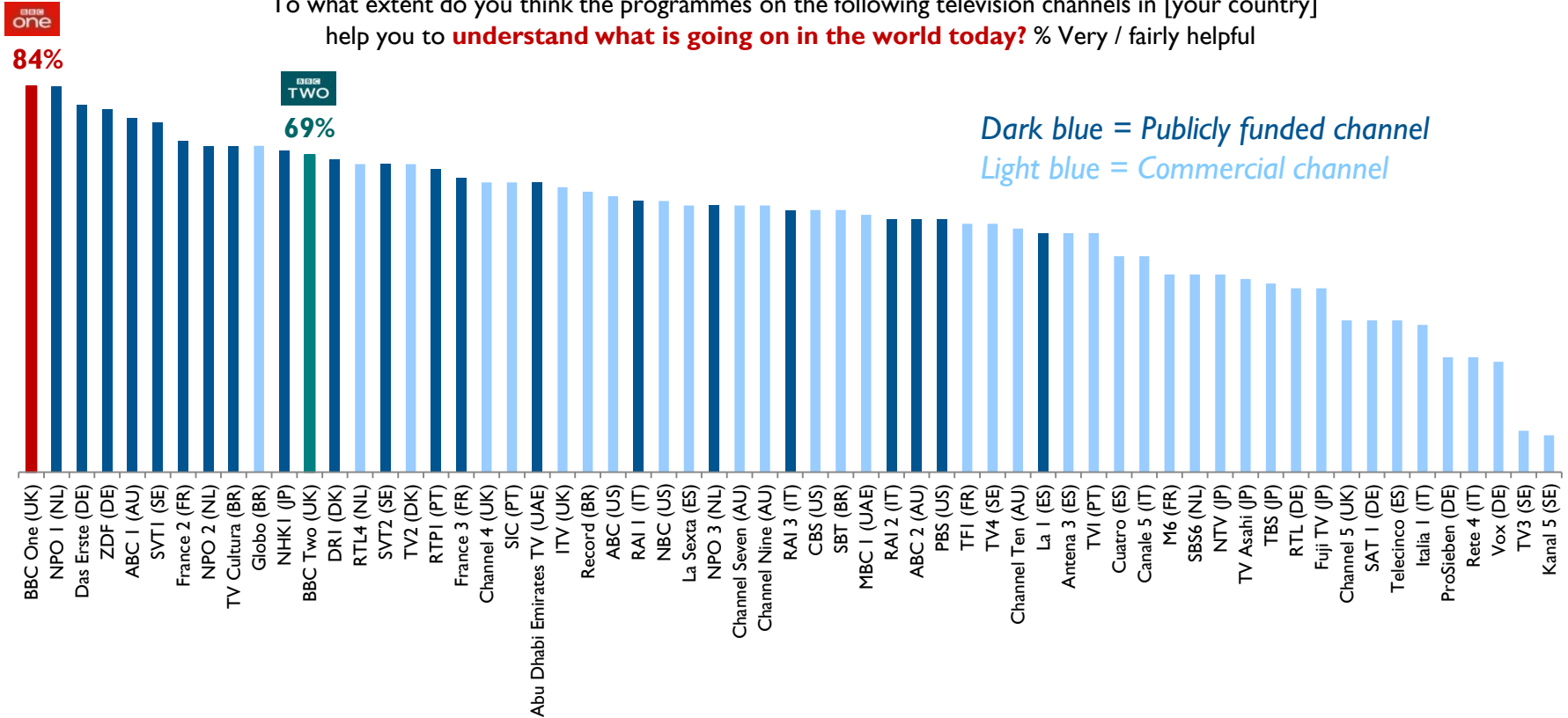
To what extent do you think the programmes on the following television channels in [your country] help you to **understand what is going on in [your country] today?** % Very / fairly helpful



And BBC One is also the joint highest channel for helping people understand what is happening in the world today

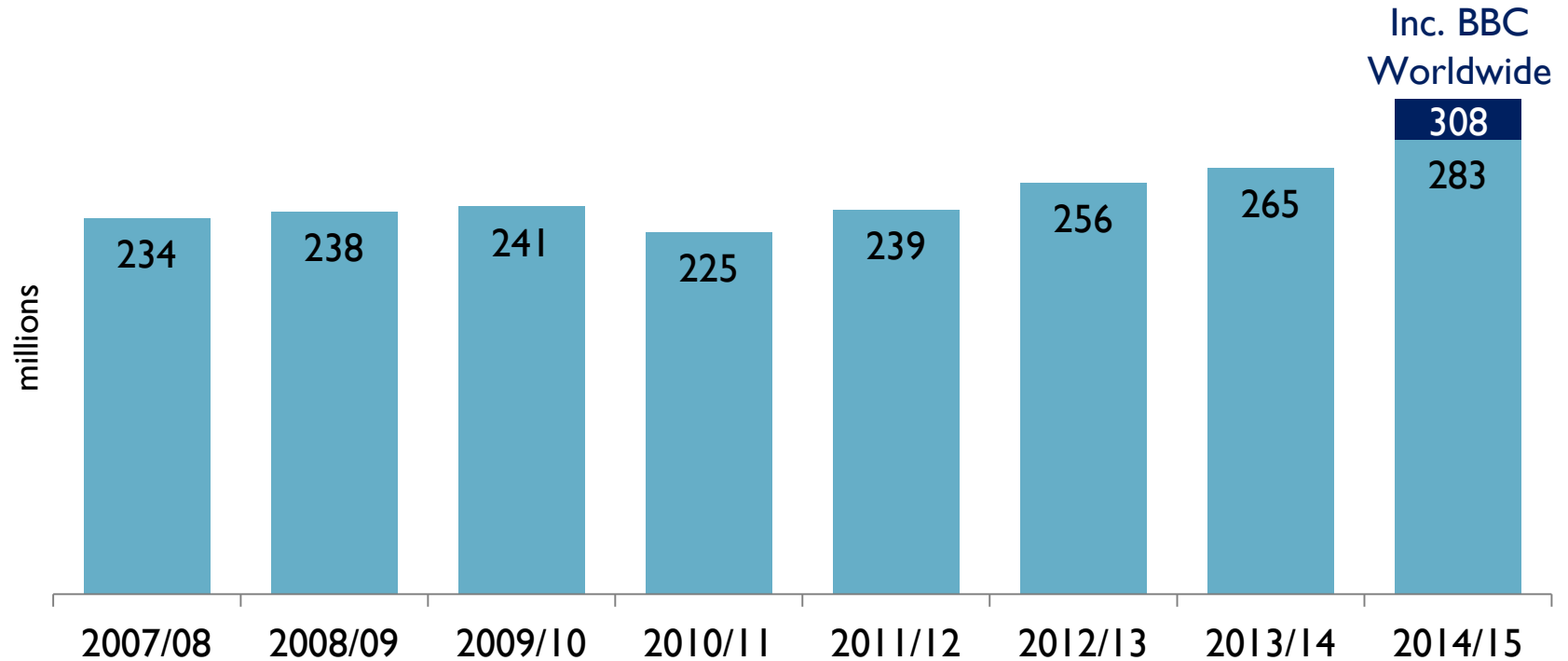
Perceptions of the extent to which TV channels help people understand what is happening in the world today rated by respondents in the country

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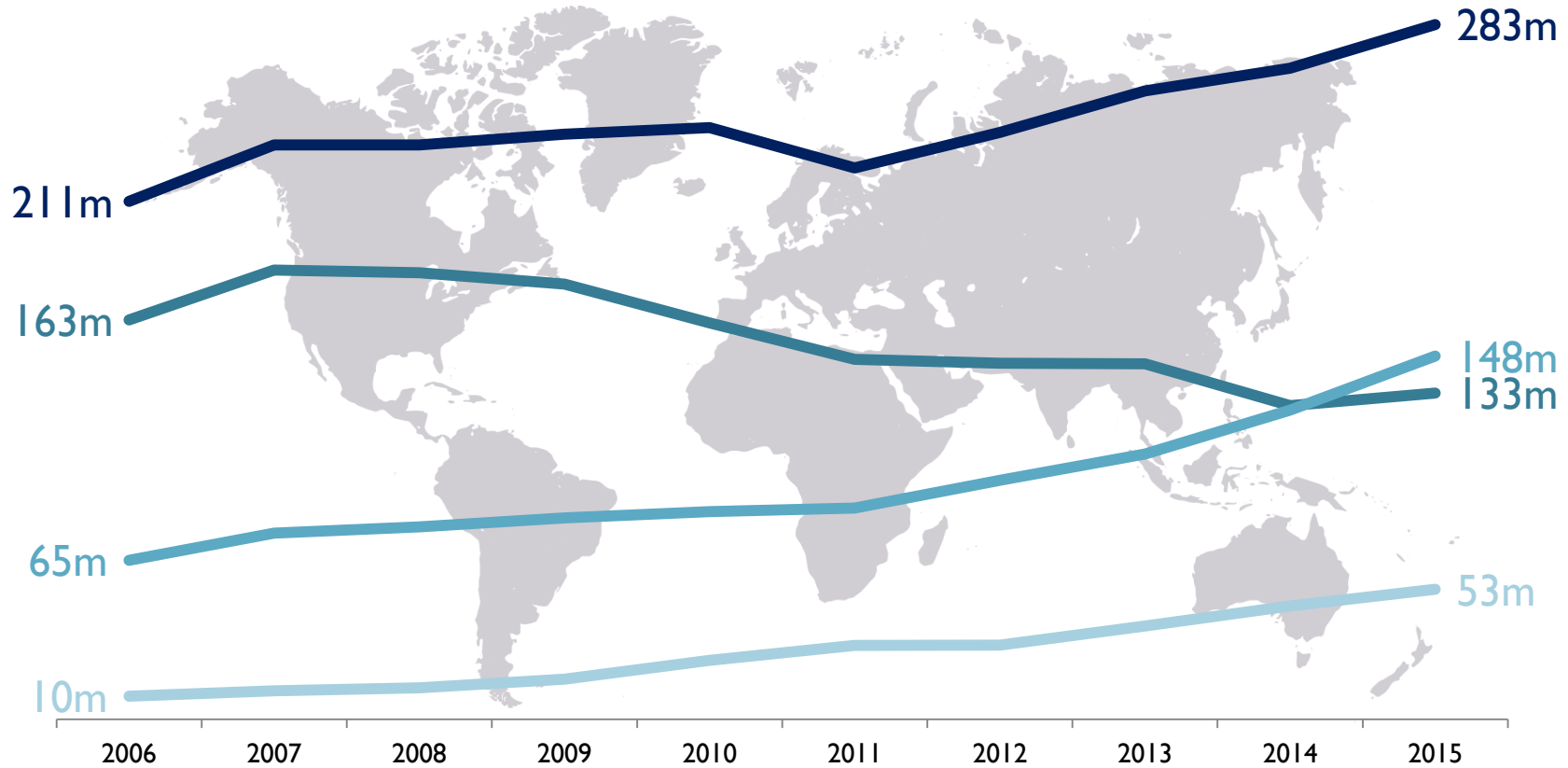
Outside the UK, the BBC reaches nearly a third of a billion people around the world per week

Global Audience Measure
BBC Global News any platform reach per week in millions



BBC Global News reach is growing across TV and online

BBC Global News reach by platform



Educate: The BBC helps people to learn and develop skills in a range of ways

BBC content helps people learn in a variety of ways



82% of all adults say they have watched, listened to or read some of the BBC's WWI centenary content



Bitesize is used by **82%** of secondary pupils and **62%** of primary pupils in school



The CBeebies Storytime app has been downloaded **1.3m** times. Meanwhile, BBC Two's Wolf Hall adaptation helped to double public awareness of the novel and increase readership by **40%**

BBC services encourage people to take up new digital skills



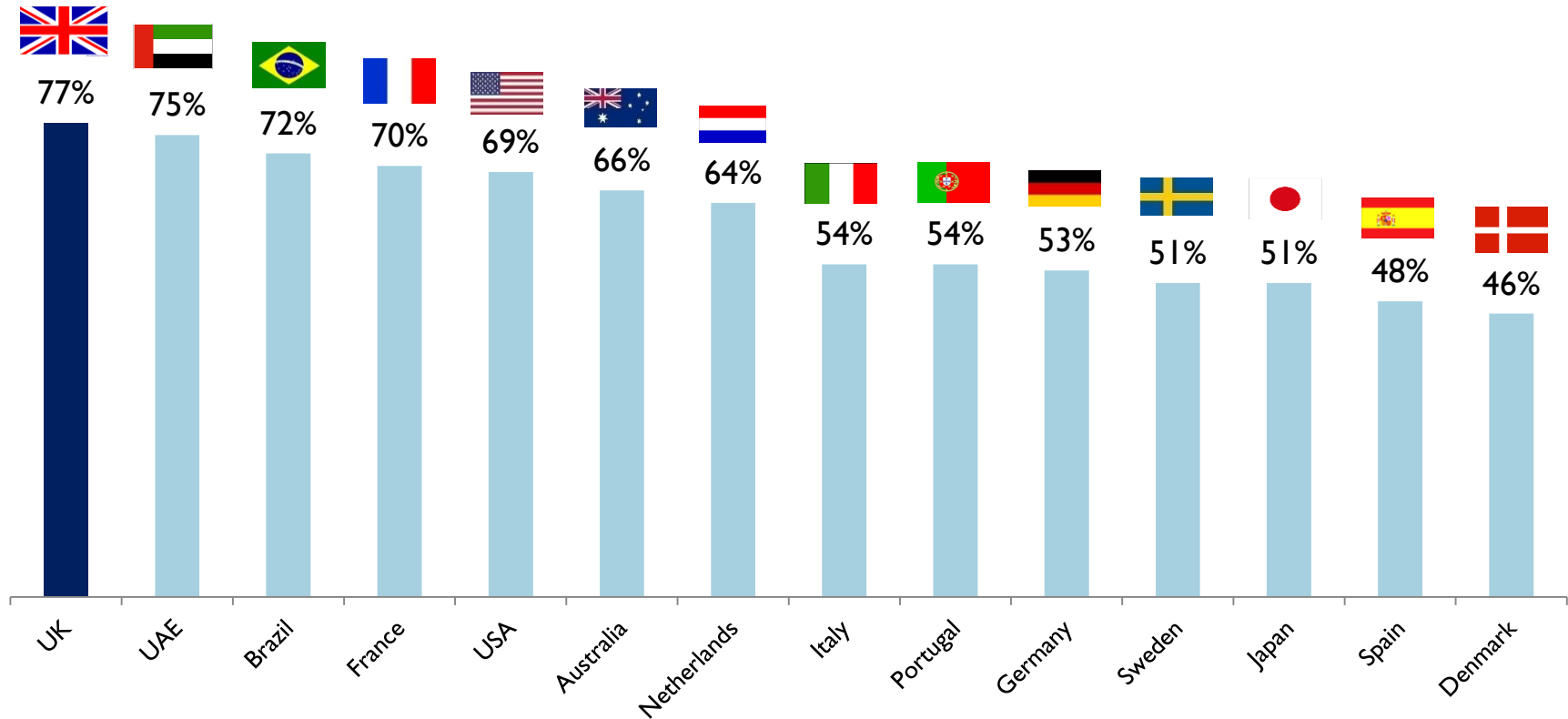
iPlayer users say iPlayer is a reason they got home broadband



internet users said one of the main reasons they went online was because of bbc.co.uk

The UK is the global leader for broadcasting TV programmes that help people to learn

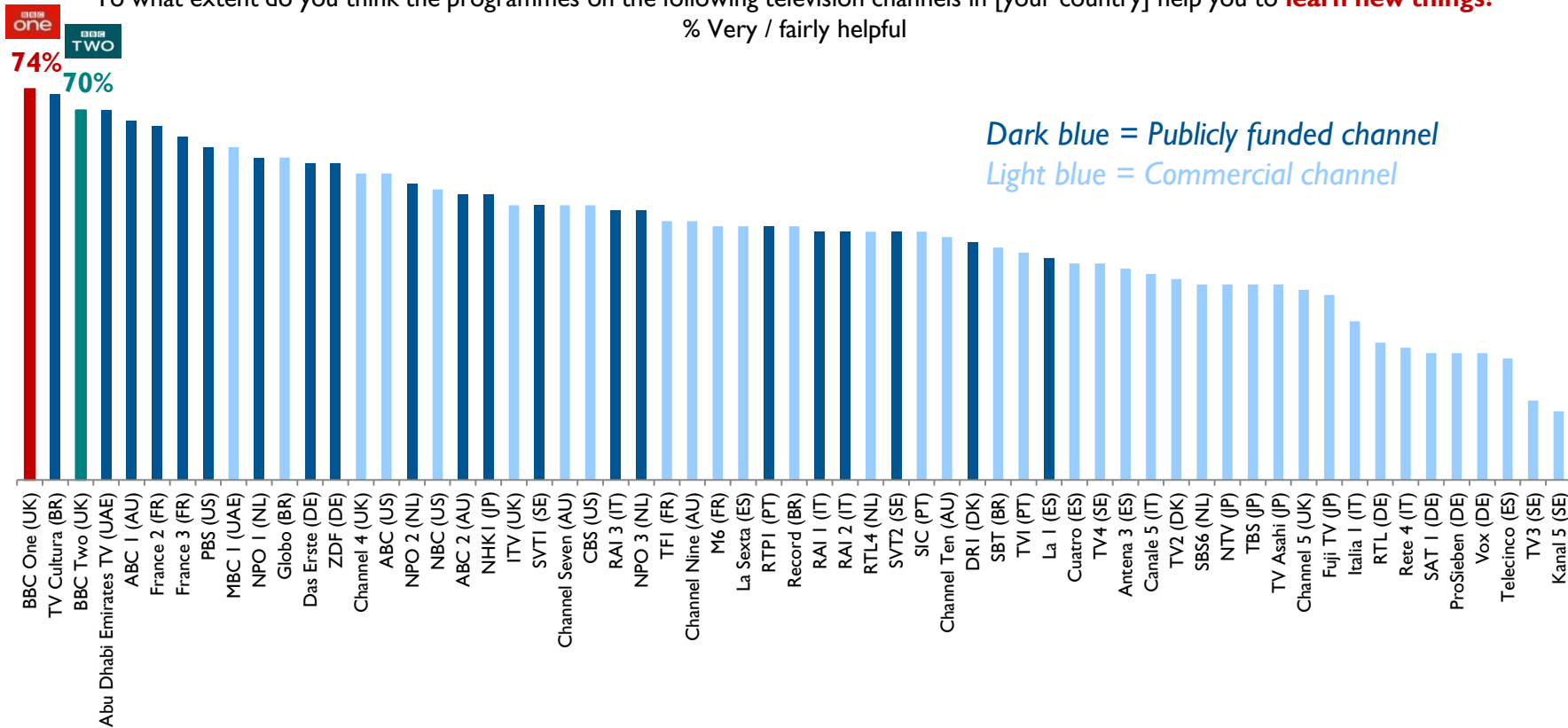
To what extent do you feel that television programmes overall in [your country] help you to learn new things?
% Very / fairly helpful



Out of 61 channels, BBC One is rated the highest for helping people to learn and BBC Two comes third

Perceptions of the extent to which TV channels help people learn new things rated by respondents in the country

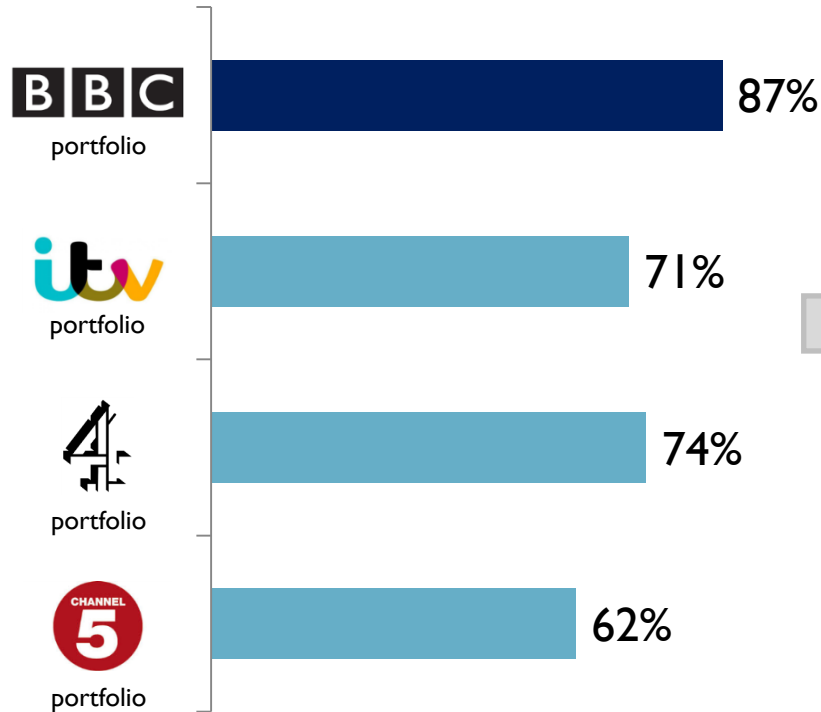
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% Very / fairly helpful



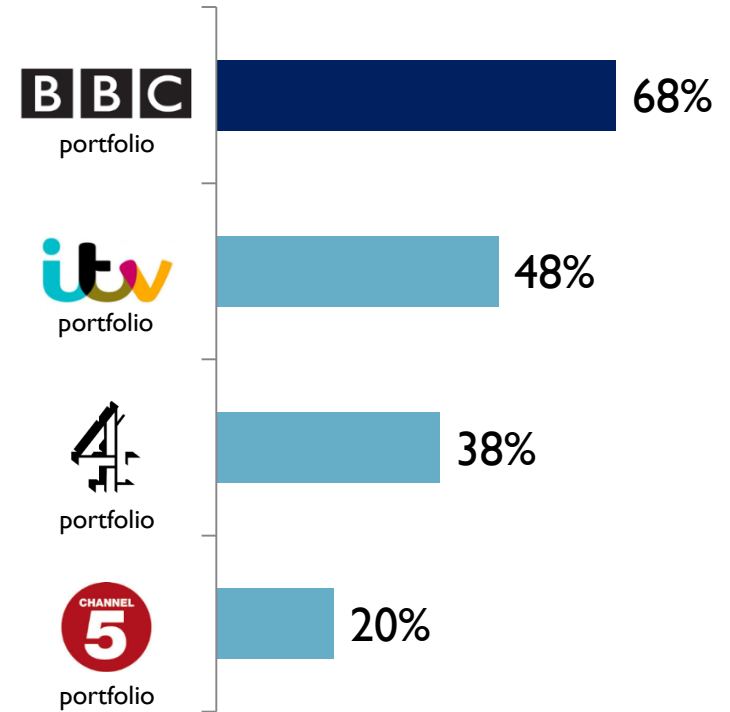
More viewers learn from watching BBC TV and because more of the UK public watches BBC TV, this means more people in the population overall learn

Did you feel you learnt anything from watching this programme?

% out of those who watched and answered question

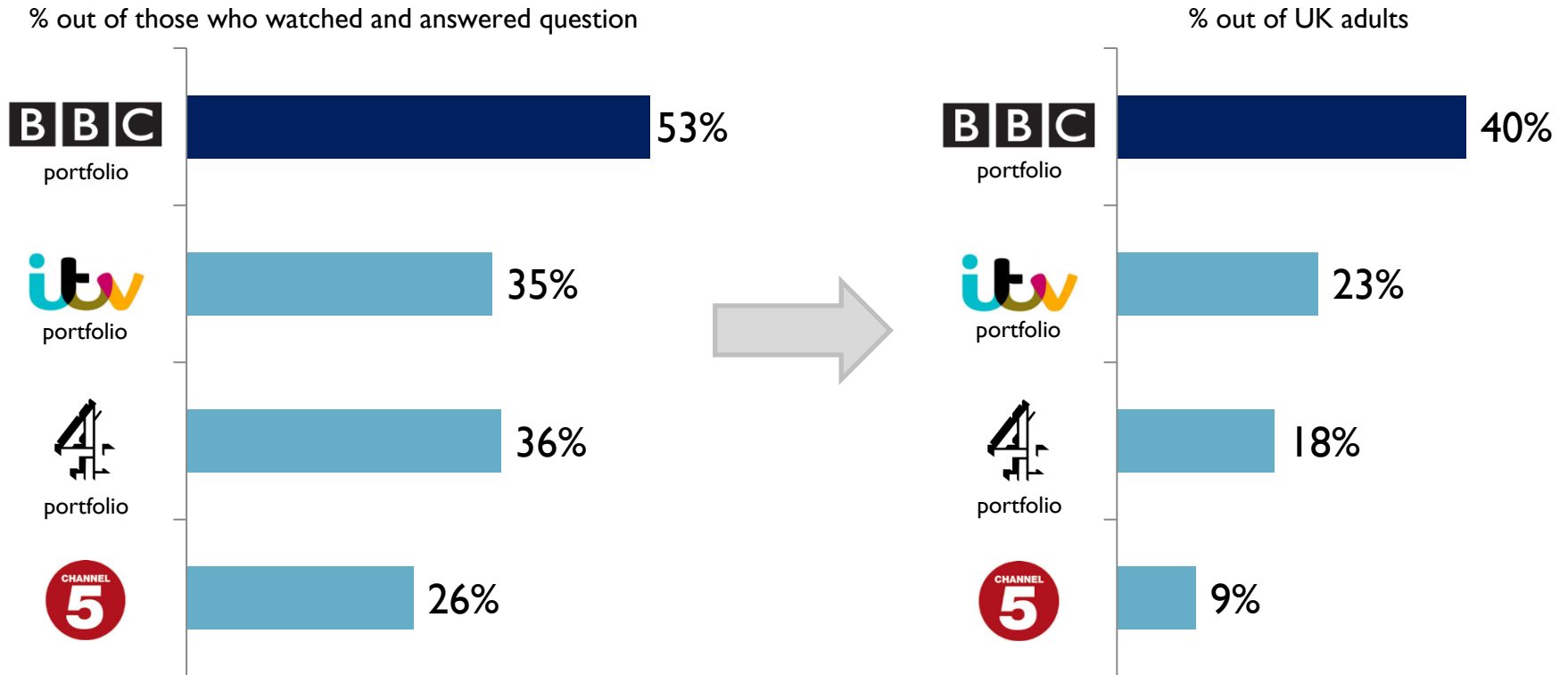


% out of UK adults



And more viewers are encouraged to do something new as a result of BBC TV

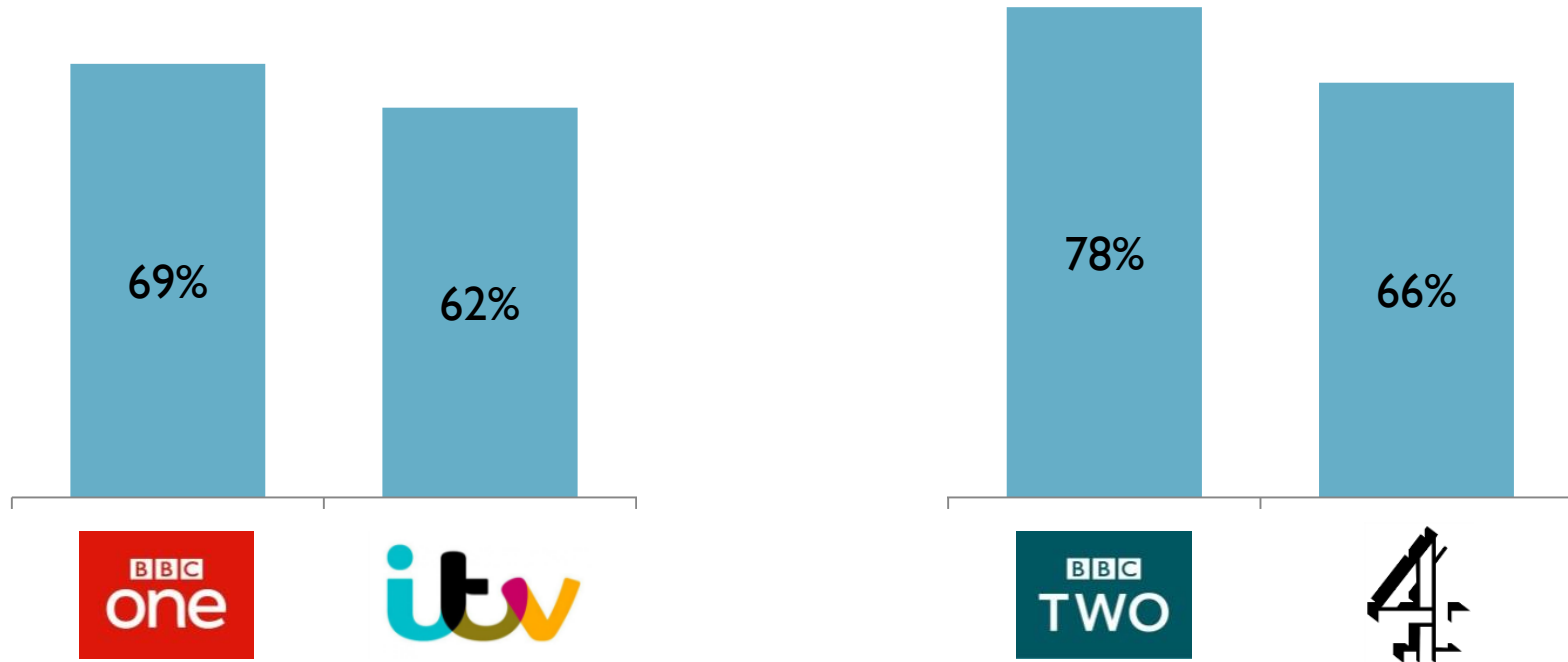
This programme encouraged me to do something new



More BBC One viewers and BBC Two viewers say they have learned something new as a result of watching the channel compared with ITV viewers and Channel 4 viewers respectively

Did you feel you learnt anything from watching this programme?

% agree out of those who watched and answered question



Entertain: The BBC makes content viewers find highly engaging and brings the nation together

The public chooses the BBC for national moments



BBC One coverage on Election Night 2015 reached over **19.3m**



The 2014 World Cup Final match attracted **14.9m** on BBC One



18.7m watched the 2011 Royal Wedding ceremony on BBC One



6.0m tuned into the Queen's Speech on BBC One on Christmas Day

And brings audiences together for different forms of entertainment



EastEnders-related content across its 30th anniversary week reached **23.9m** people (over 40% of the population)



The Great British Bake Off final is the most popular programme of 2015 so far – an average audience of **13.4m** watched live



Glastonbury 2015 BBC TV reached **18.9m** people

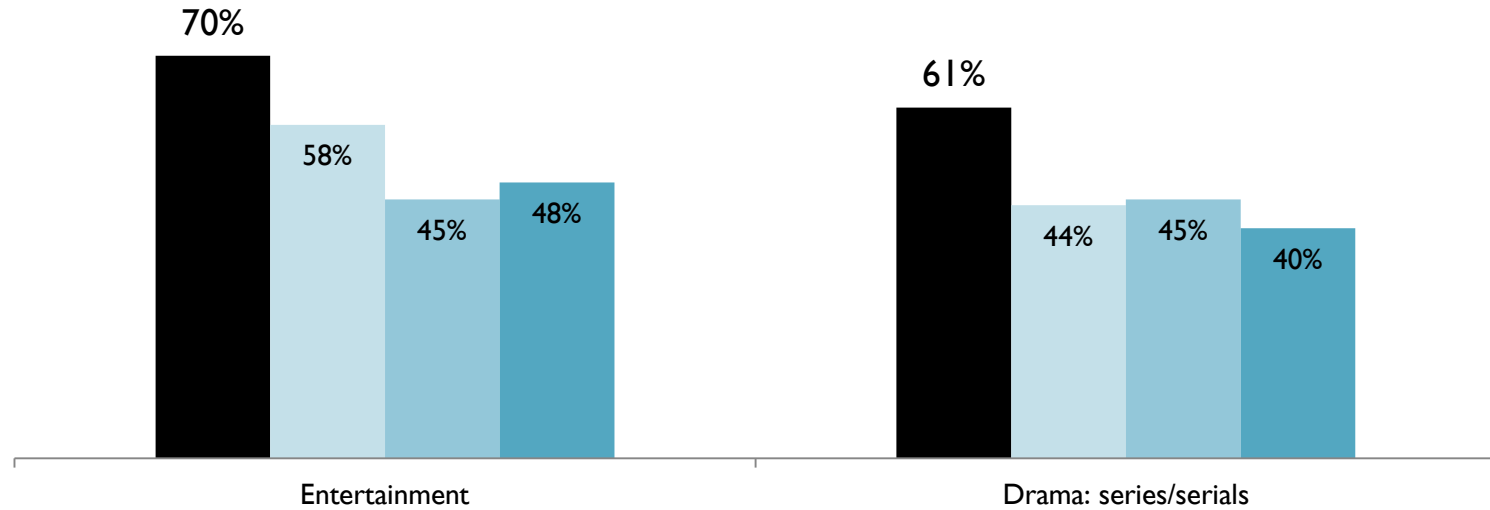


An average audience of **11.7m** watched 2014's Strictly Come Dancing final

Inform, Educate, Entertain is imbued in all BBC content, and entertainment and drama are key ways in which the BBC has impact

Did you feel you learnt anything from watching this programme?

% agree out of those who watched and answered question



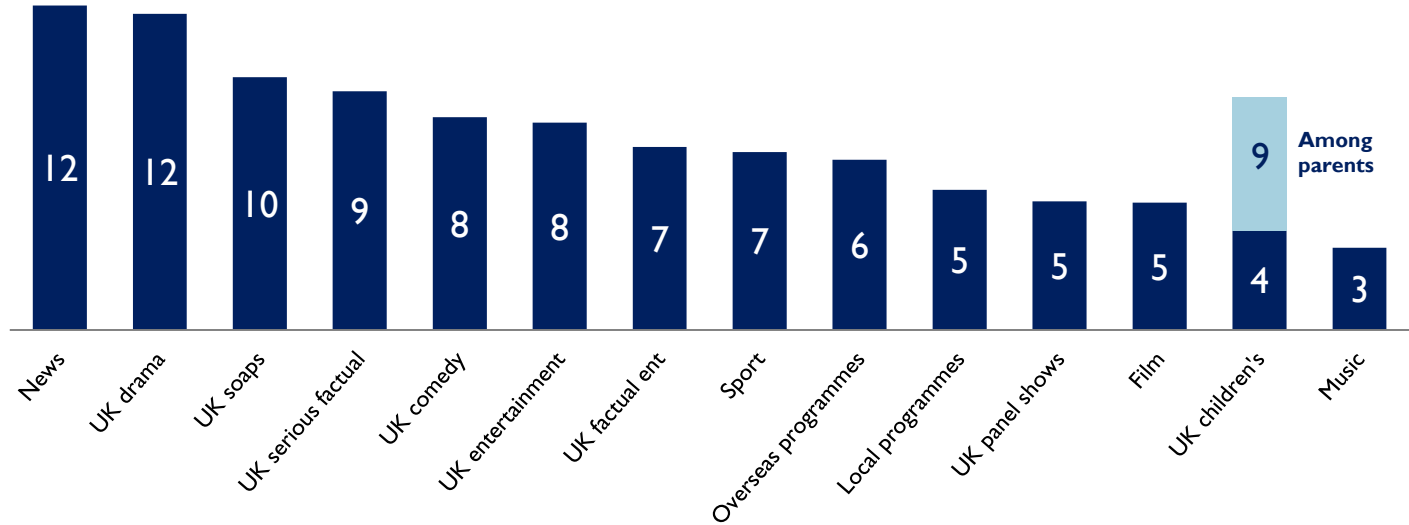
The UK public values a wide range of genres from the BBC

From both a consumer and citizen perspective, people want a variety of genres on BBC TV

Consumer value

Points allocated

Respondents divided 100 points between genres based on how much they / their household value them from BBC TV



Citizen value

Mean score

Respondents rated each genre out of 10 based on how much they value each from BBC TV for the benefit of society



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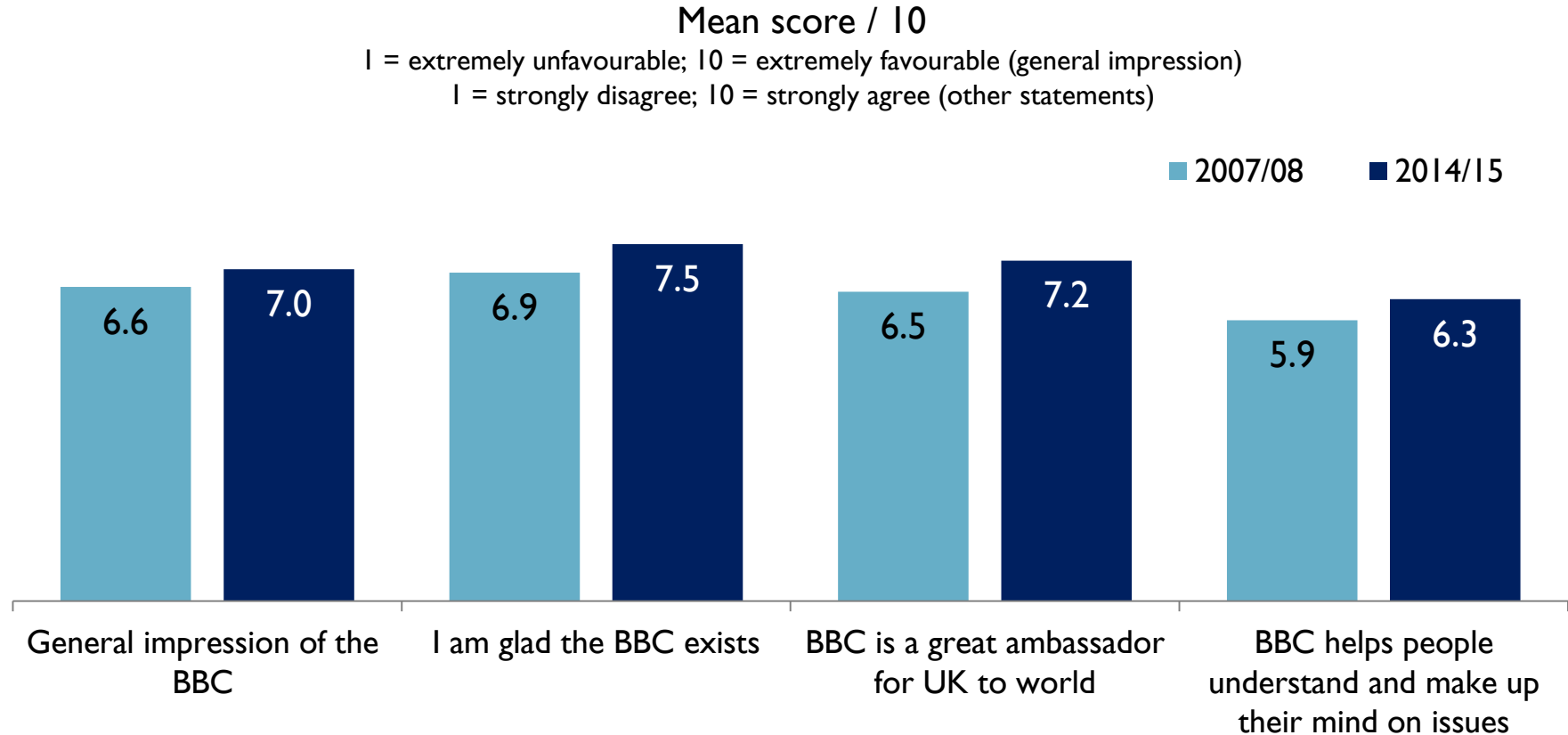
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The UK public's views on the BBC overall

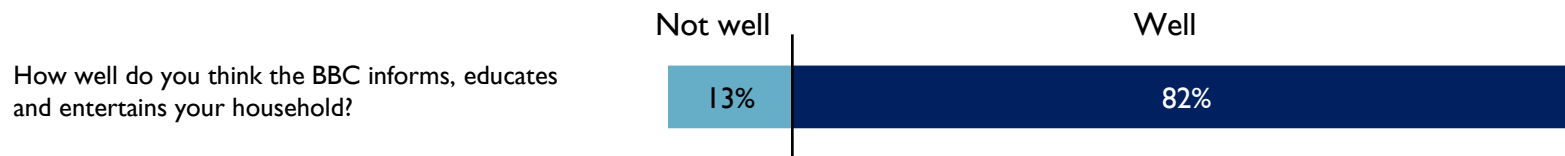
The time people spend with the BBC, coupled with their appreciation of the content, has meant that public support for the BBC has risen over this Charter period

- The public has a very positive view of the BBC overall and gives the BBC a 7 out of 10, on average. Despite greater media choice today, this has risen over this Charter period, and compared with 2007/08, more people also now feel glad the BBC exists
- New research involving all members of over 1,000 households shows that 82% of UK households feel that overall the BBC informs, educates and entertains them well. Even among groups that use the BBC less, that support does not fall below 75%
- Despite a notable drop in trust during Savile, levels of trust have risen in the BBC and are now higher than they were at the start of the Charter
- The BBC remains by far the most trusted news source in the UK and is also seen as the most impartial news provider

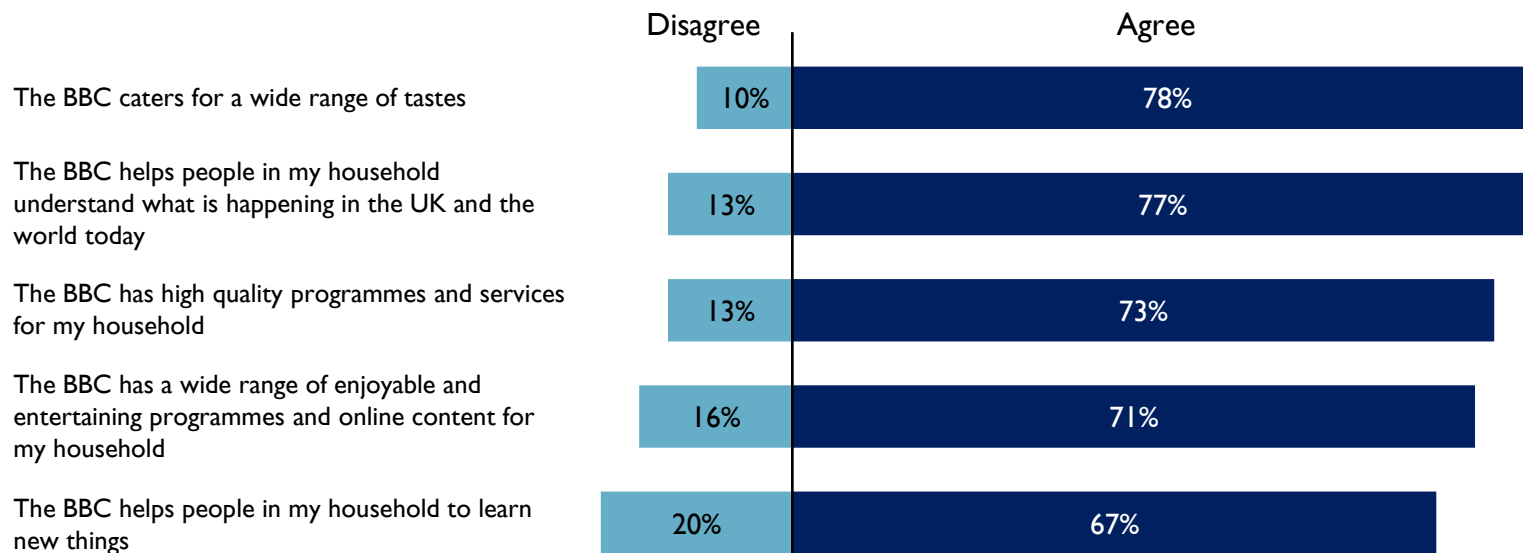
The time people spend with the BBC, coupled with their appreciation of the content, has meant that overall feelings towards the BBC have risen over this Charter period



New research involving over 1,000 households shows that the BBC serves UK households well

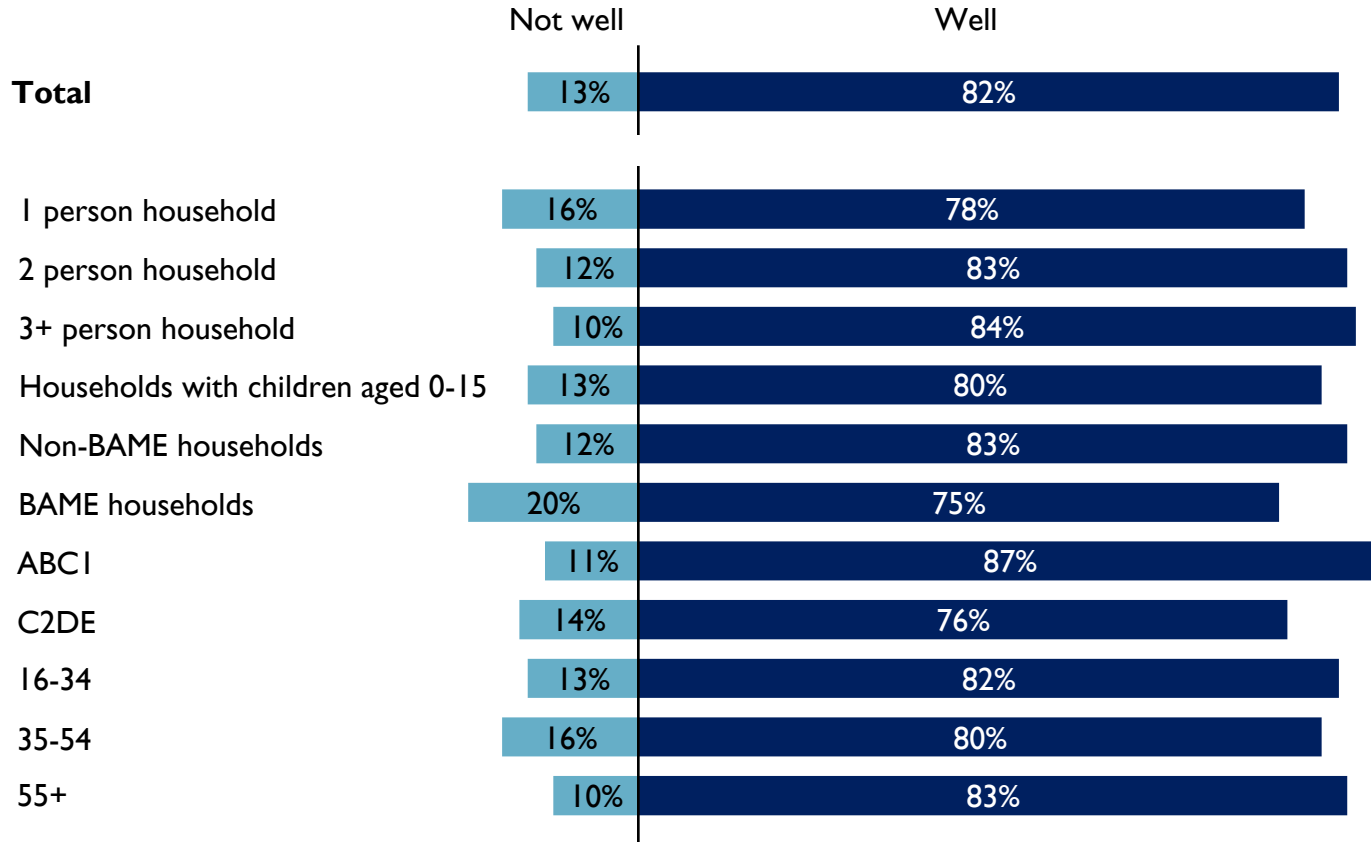


On a scale of 1 to 10 where 1 means strongly disagree and 10 means strongly agree, please give a score for the following statements



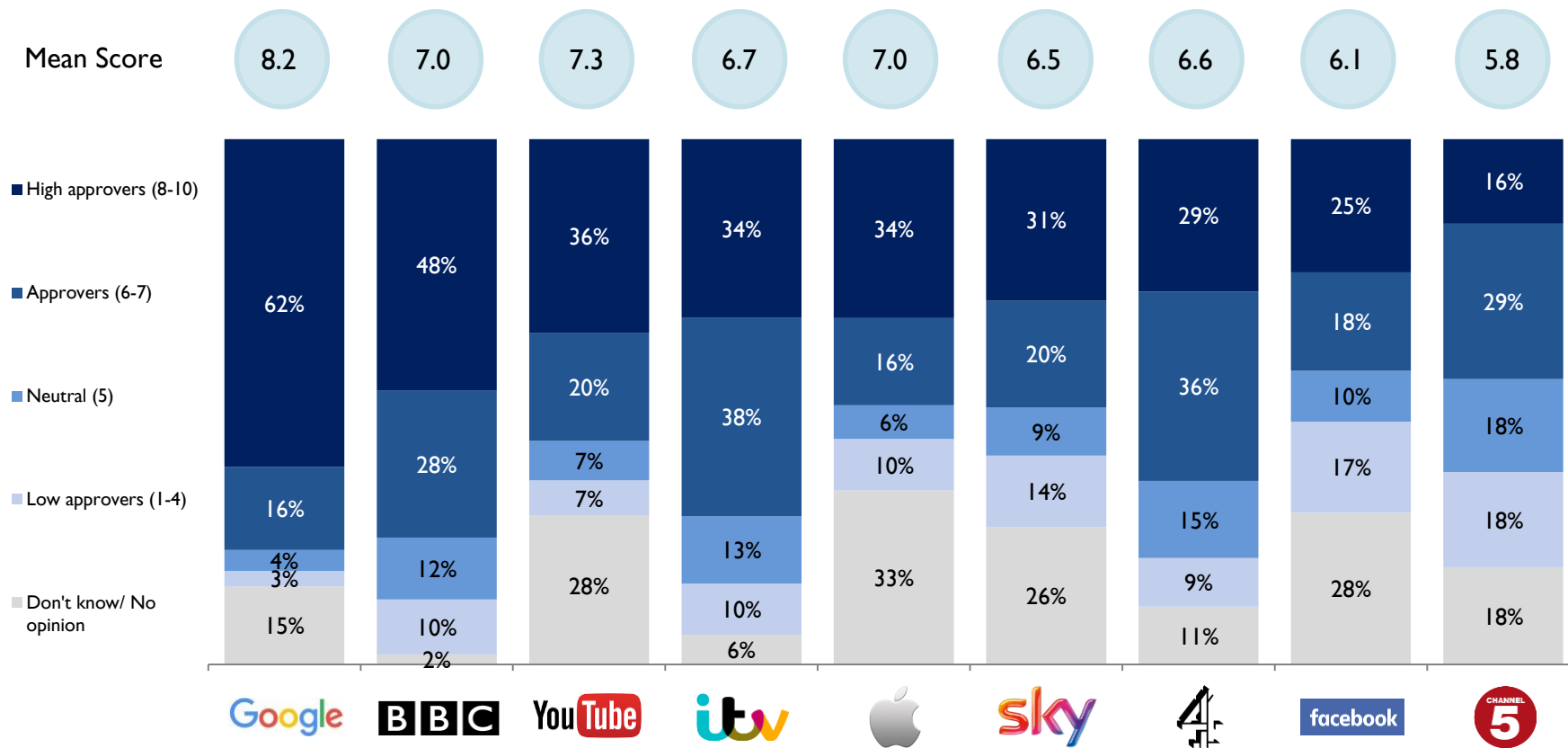
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How well do you think the BBC informs, educates and entertains your household?



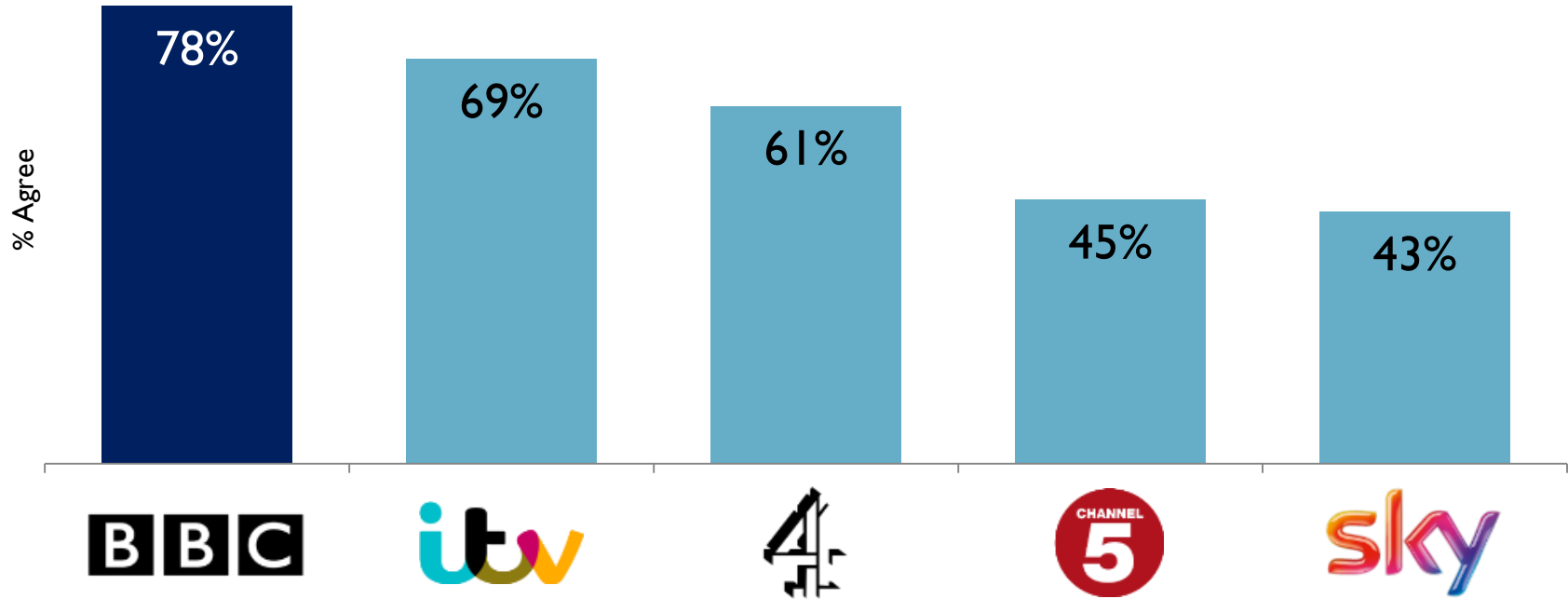
The public has a very positive view of the BBC, giving a score of 7 out of 10, on average – significantly ahead of other broadcasters

General impression of broadcasters and organisations

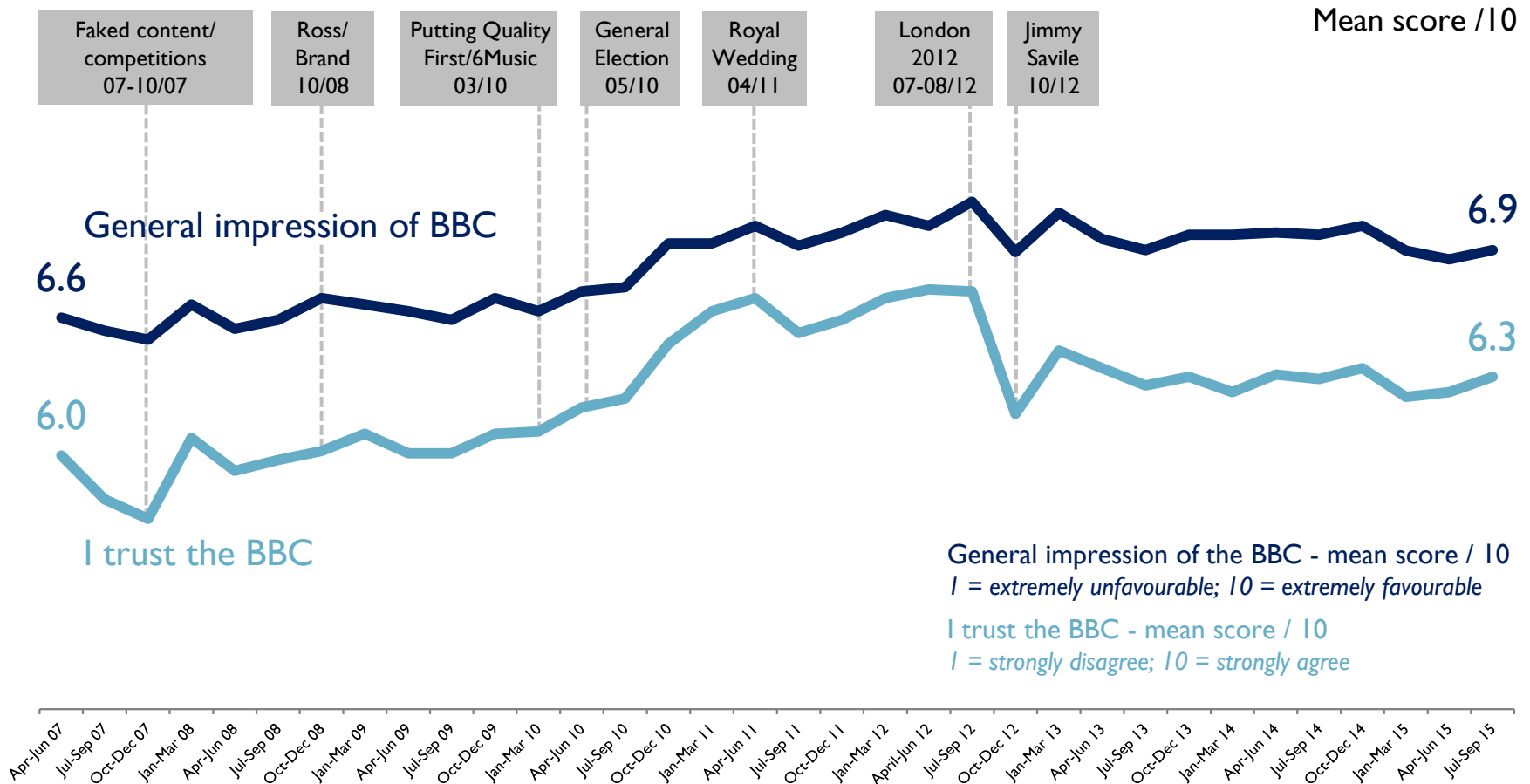


Four out of five people would miss the BBC if it was no longer there

% who would miss each broadcaster if it no longer existed

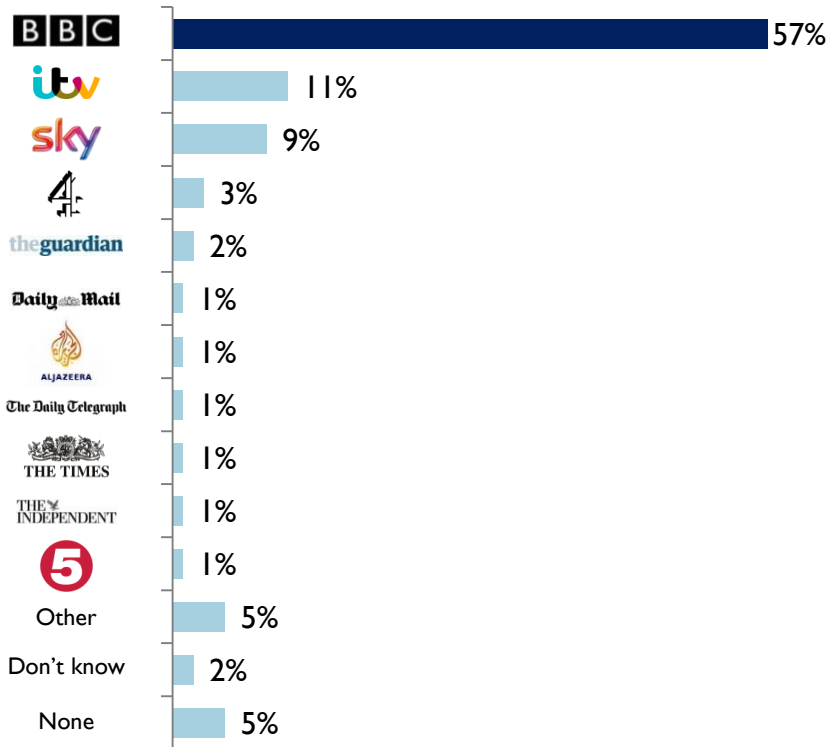


Trust in the BBC has been more volatile than other perceptions but scores are higher now than they were at the start of the Charter

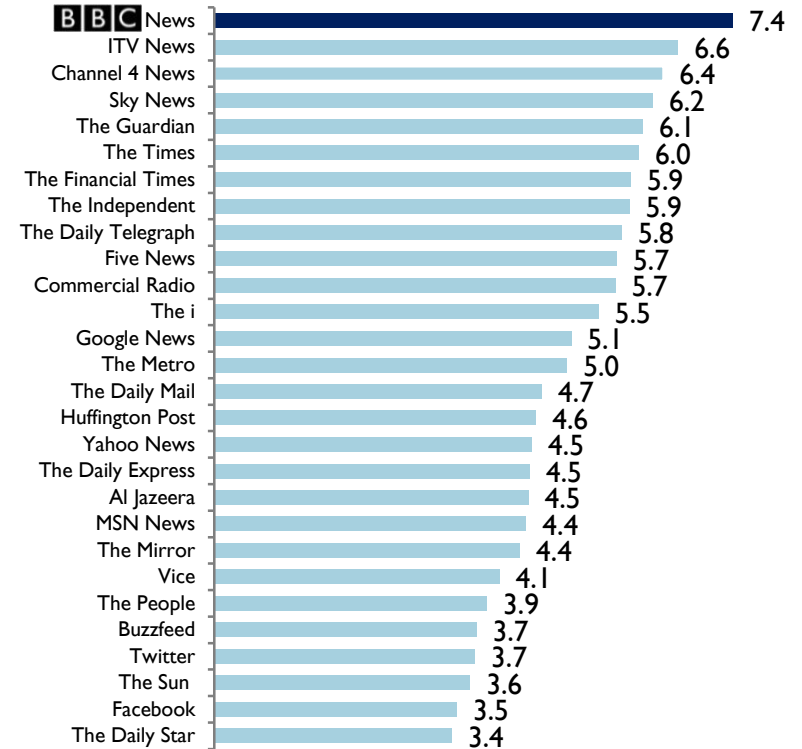


The BBC remains more trusted than any other news source in the UK

Of all the news sources (TV broadcaster, radio, newspaper, magazine or website), which **ONE** source are you most likely to turn to for news you **trust** the most?

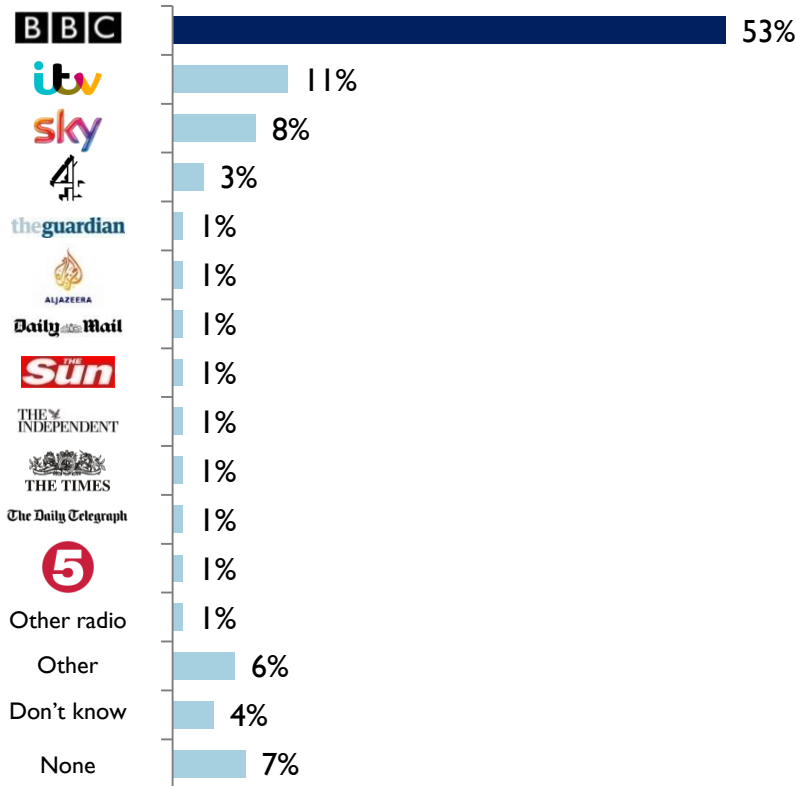


To what extent do you **trust** [insert source] as a news source?
Mean score / 10: 1 = do not trust at all; 10 = trust a great deal



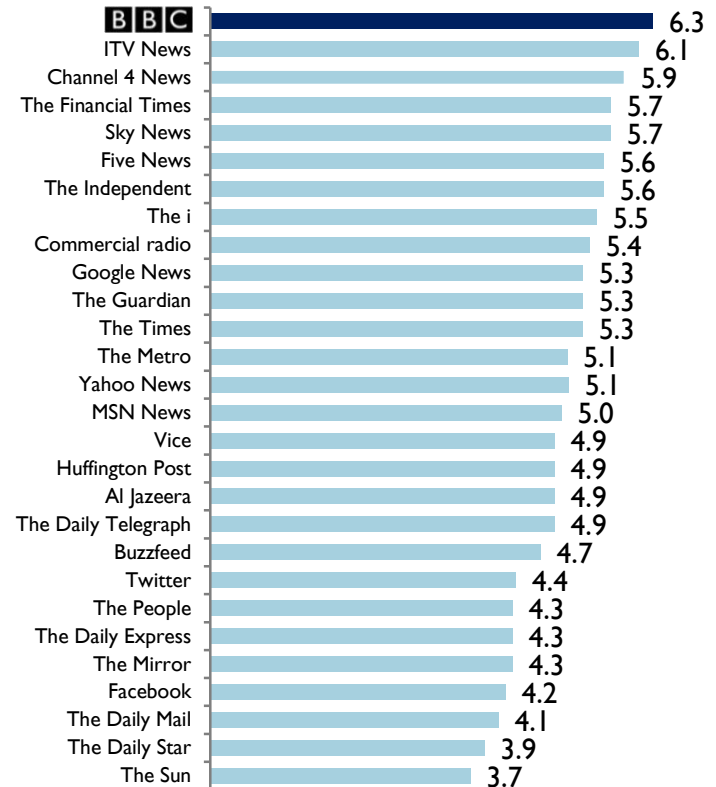
The BBC is also the news source people say they turn to for impartial news coverage

Of all the news sources (TV broadcaster, radio, newspaper, magazine or website), which **ONE** source are you most likely to turn to if you want **impartial** news coverage?



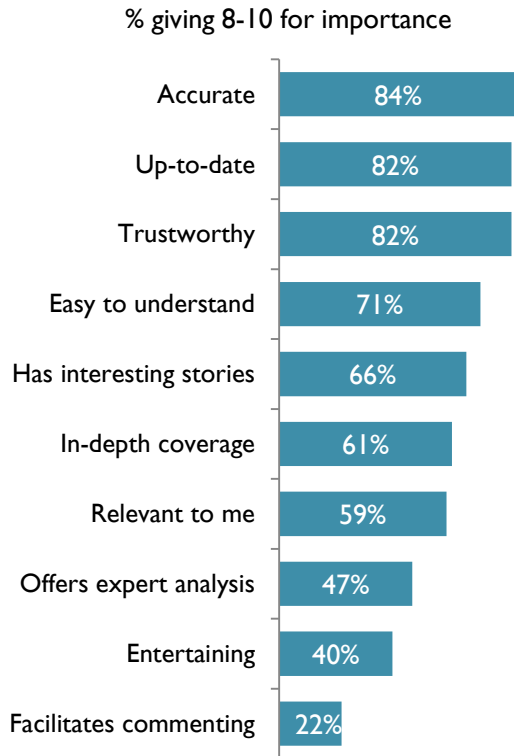
How **biased or impartial** do you think each of the following news sources is?

Mean score / 10: 1 = very biased; 10 = very impartial

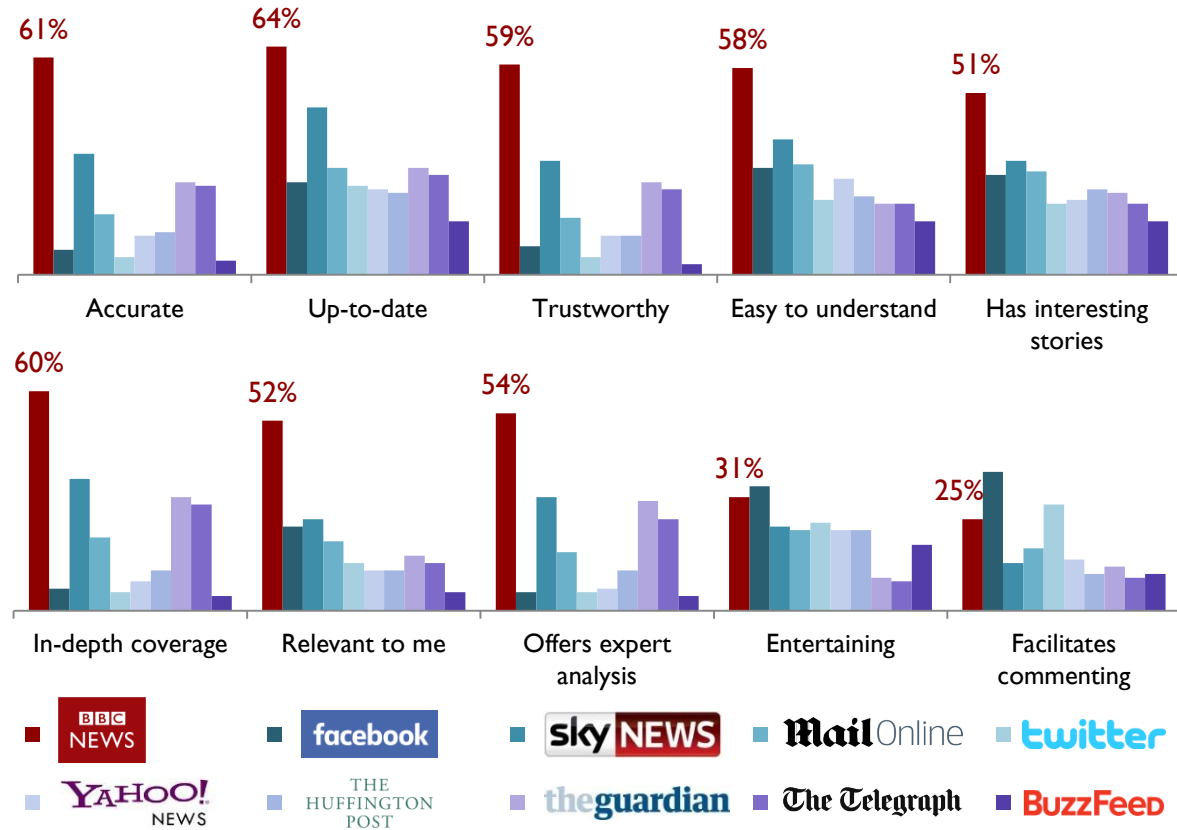


BBC News comes top for eight of the ten most important qualities for news online

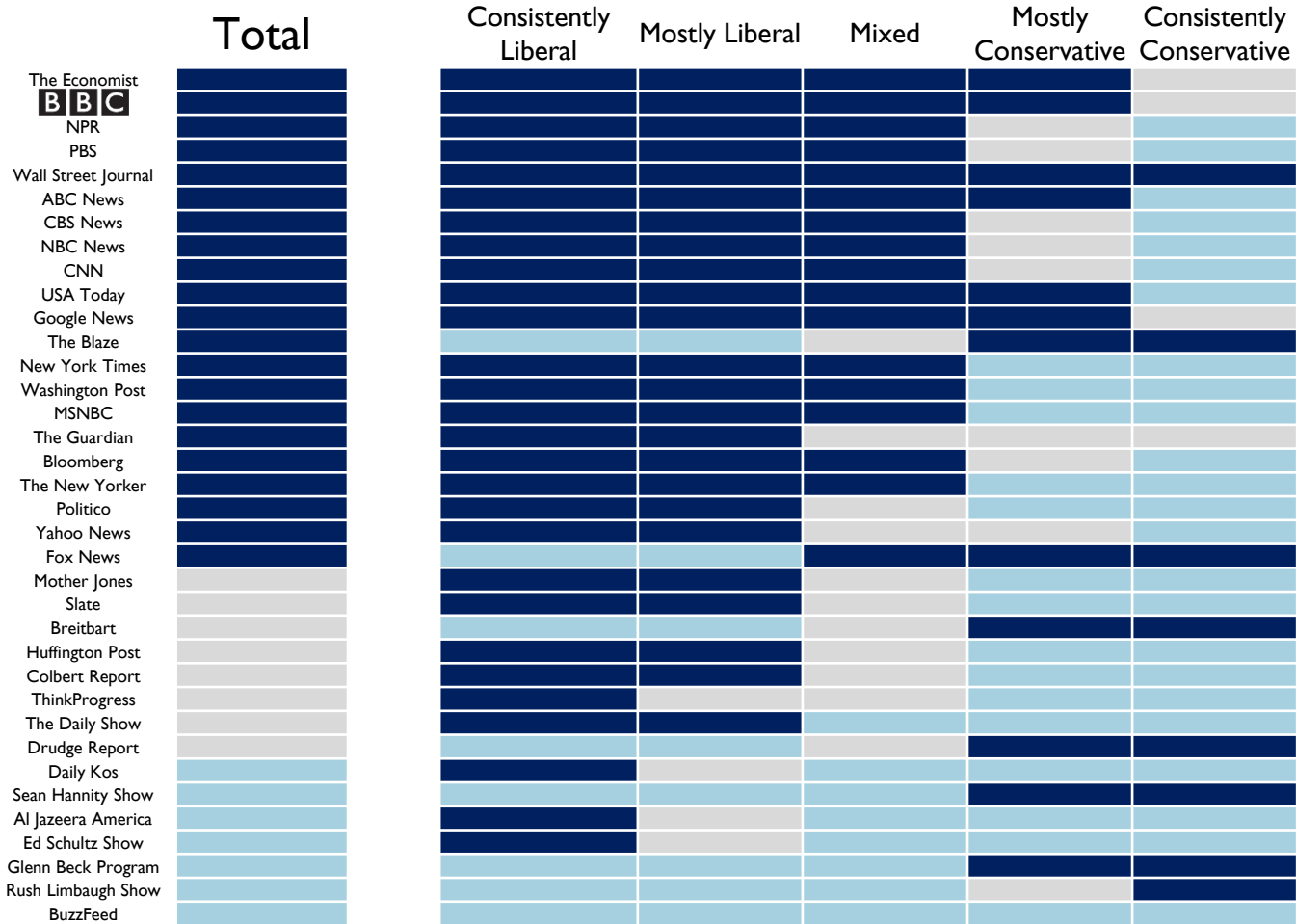
Internet users' top priorities for choosing news online



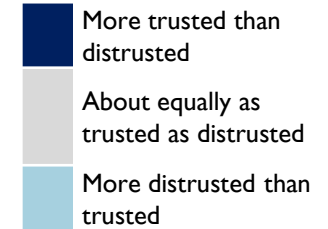
How different news providers perform on the top priorities



The BBC is one of the few news providers trusted by people across the political spectrum in the USA, illustrating that its impartiality is recognised abroad



Guide to interpretation:
Within each ideological group, the source is overall



Ideological consistency based on a scale of 10 political values questions. Grouping of outlets is determined by whether the % who trust each source is significantly different to the % who distrust each source. Outlets are then ranked by the proportion of those who trust more than distrust each.

The BBC and its audiences in the UK

1. Usage of BBC services

Over this Charter period, usage of the BBC has remained high: almost all of the UK uses the BBC each week, for around 18 hours on average

2. Views on BBC content

This is directly connected to the public's high appreciation of the quality of BBC content

3. Views on the BBC's impact

This is also because of the extent of the distinctive impact that BBC content makes in informing, educating and entertaining the public

4. Views on the BBC overall

The time people spend with the BBC, coupled with their appreciation of the content and its impact, has meant that support for the BBC has risen over this Charter period

5. Views on the licence fee

Likewise, while no form of taxation is universally popular, there has also been an increase in public backing for the licence fee as the means of funding the BBC and willingness to pay for the BBC is strong

6. Challenges the BBC faces

However, extraordinary change in the media landscape poses challenges for the BBC and all UK broadcasters, especially in delivering to young audiences. Plus, an evolving UK means a greater need to reflect and represent all areas of the country

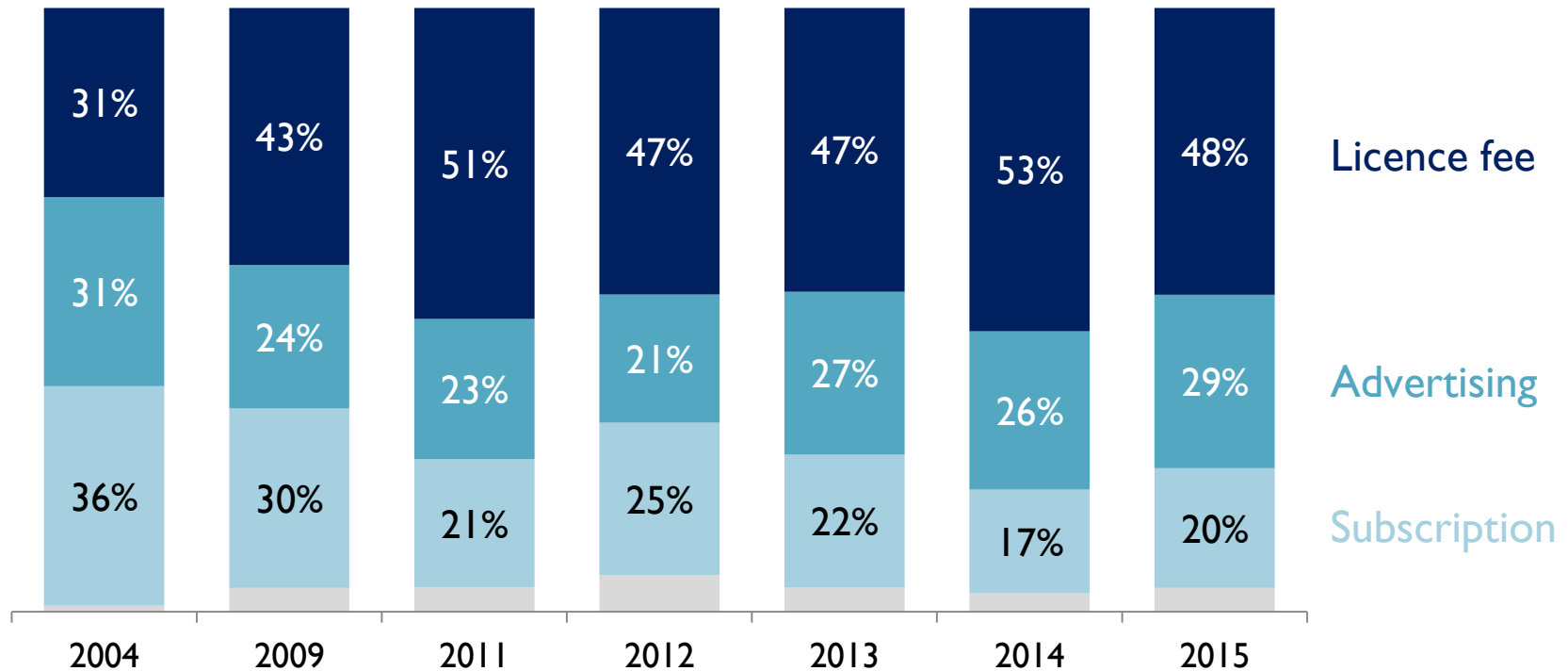
The UK public's views on the licence fee

While no form of taxation is universally popular, long term polling (using the same question in each wave) shows that there has been an increase in public backing for the licence fee over this Charter period and willingness to pay for the BBC is high

- Close to half of the UK overall now back the licence fee – making it the method of funding the BBC with the single most support (compared with 29% for advertising and 20% for subscription)
- Support is higher now than it was in 2004 when 31% backed the licence fee and higher than twenty years ago. By contrast, support for subscription has been falling over the last ten years and is now the least popular option
- The BBC compares well to other media, communications and leisure payments in terms of value for money
- And public willingness to pay for the BBC is high, with some 73% of households saying top-of-mind that they are willing to pay the current level or more – a figure which rises when households spend time without the BBC

While no form of taxation is universally popular, the licence fee is the method of funding with the single most support

Which of the following would you like to see as the main source of BBC funding?

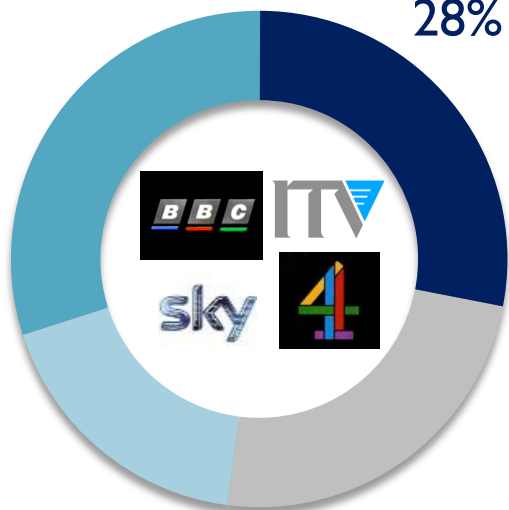


Despite far greater media choice today, support for the licence fee is also higher now than it was 25 years ago

Which of the following would you like to see as the main source of BBC funding?

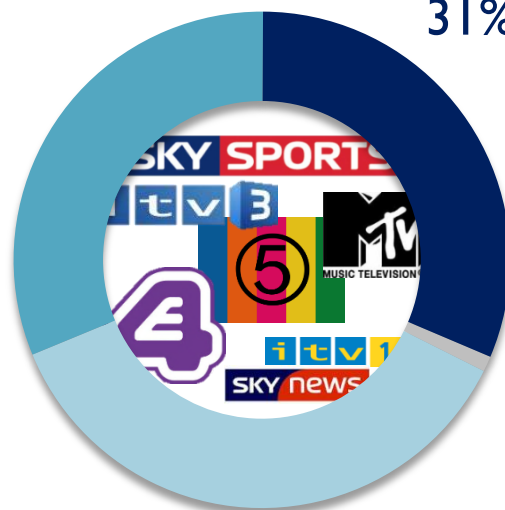
1989

28%



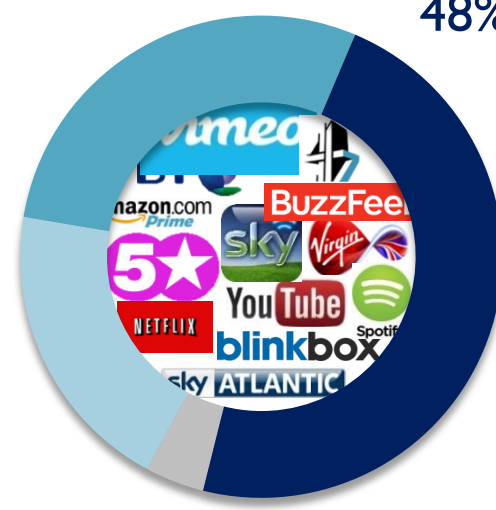
2004

31%



2015

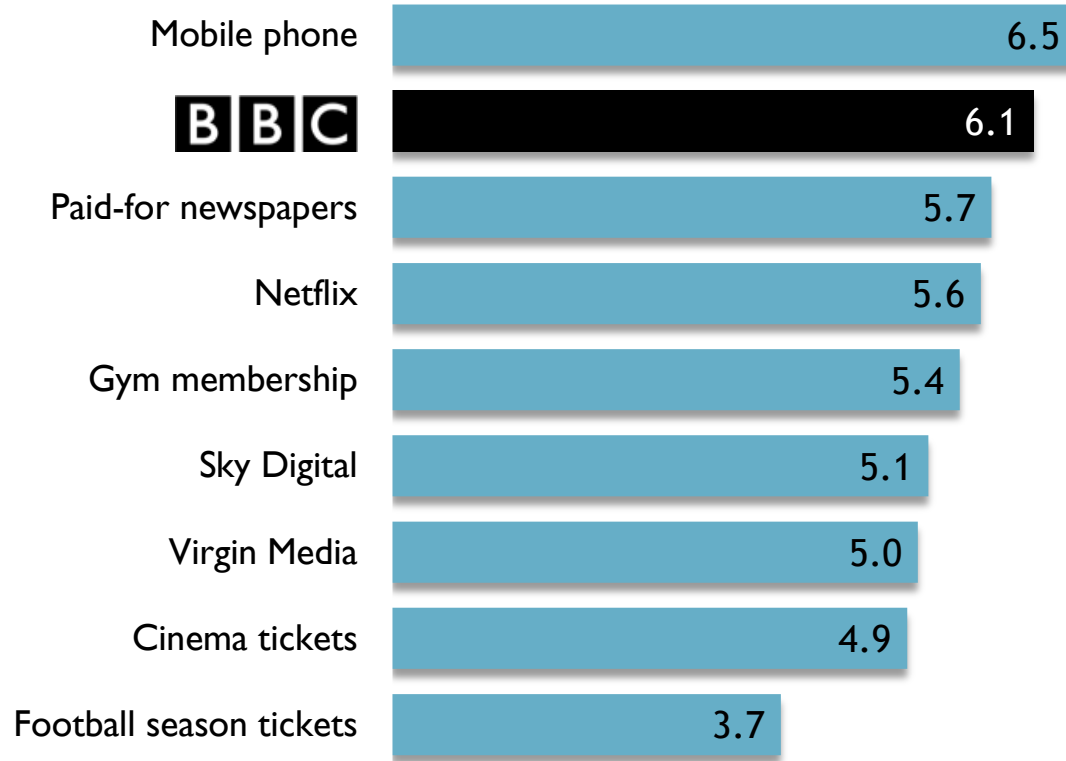
48%



■ Licence fee ■ Advertising ■ Subscription ■ Don't Know / other

The public tends to give middling to low scores for the value for money of media, communications and leisure payments. However, the BBC compares well

Value for money of media and leisure payments






Mean score out of 10:
1 = very poor value for money;
10 = very good value for money

73% of households say top-of-mind that they are willing to pay the current level or more – a figure which rises when households spend time without the BBC

Top-of-mind opinions on what households say they are willing to pay for the BBC



 Nothing  Less than licence fee  Licence fee or more

- Top-of-mind 73% of UK households say that they are willing to pay the licence fee or more
- **However**, an experiment into the realities of life without the BBC indicates that people's initial view of their willingness to pay for the BBC is most often likely to be an underestimation:
 - Research by MTM shows that two-thirds of those households that initially said, given the choice, they **would not pay** or would only **pay less than the current licence fee** changed their minds and became **willing to pay the full amount** after nine days without the BBC
 - Two-thirds of those who had been **willing to pay** the full amount at the start of the experiment became **even more positive** about what they would pay
 - This research shows that once households experience life without the BBC, the proportion that are willing to pay the full licence fee or more becomes much higher

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However, extraordinary change in the media landscape poses challenges for the BBC and all UK broadcasters, especially in delivering to young audiences. Plus, an evolving UK means a greater need to reflect and represent all areas of the country

Challenges that the BBC faces

With change in how people are consuming media, with competition that is increasingly targeted and from global providers, and with an evolving UK, the BBC faces three broad challenges

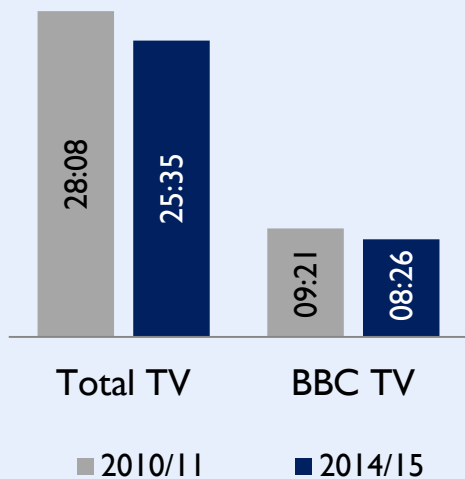
Challenges include:

- **Competition for time:** with such rapid growth in the choice available, audiences – especially young people and children – are spreading their media time over a wider range of content, with less available time to spend on linear media
- **Competition for quality:** with increased competitors, audience expectations of content are also beginning to change
- **Reflecting a changing UK:** changes in the political landscape mean a greater need to reflect and represent the different Nations of the UK

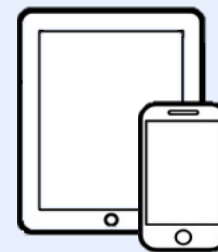
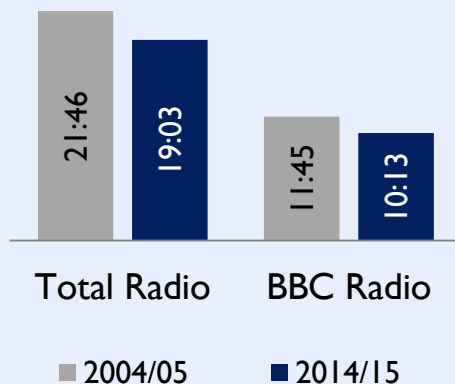
With such rapid growth in the choice available, people are spreading their media time over a wider range of content, with less available time to spend on linear media



Total TV time spent on TV set



Total Radio time spent

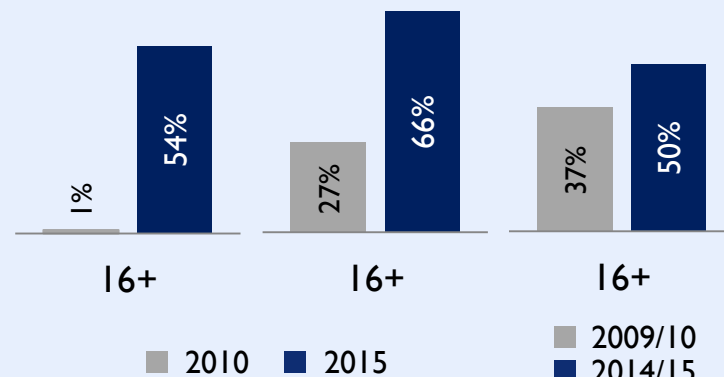


Online ownership

Tablets

Smartphones

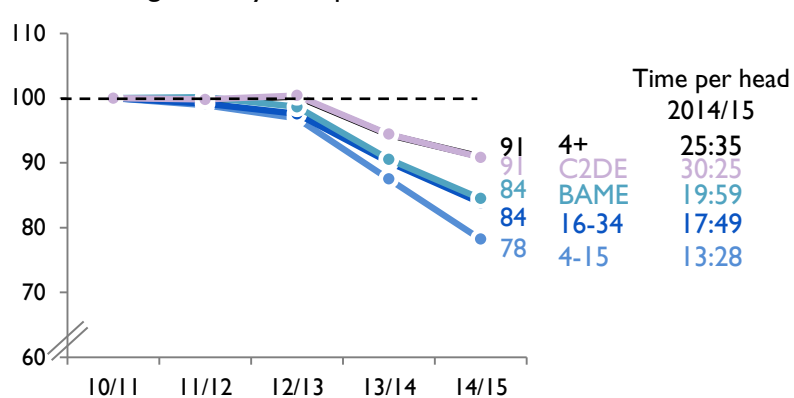
BBC Online reach



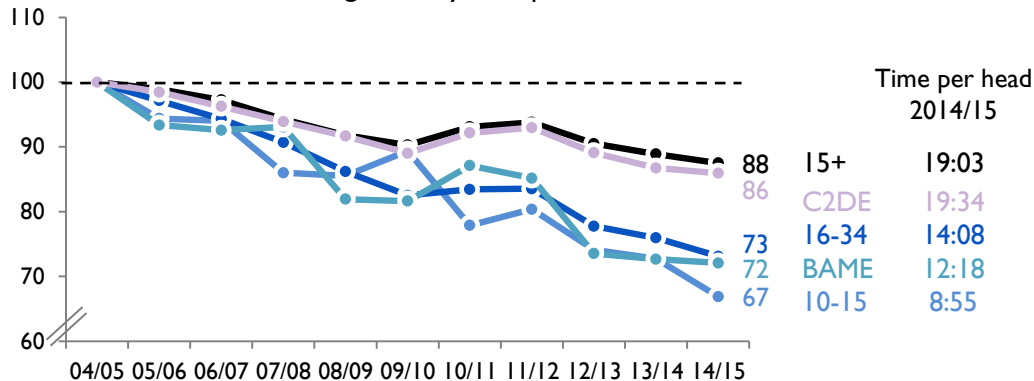
With countless media organisations vying for their time, the changes we see across the population are most pronounced for children, young and BAME audiences

N.B. Exaggerated scale

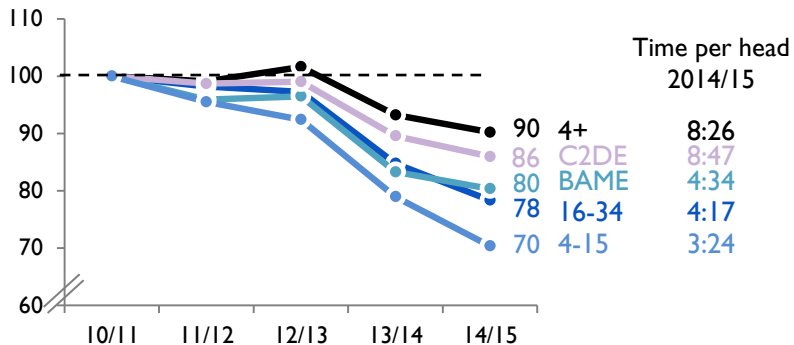
Total TV average weekly time per head on TV set indexed on 2010/11



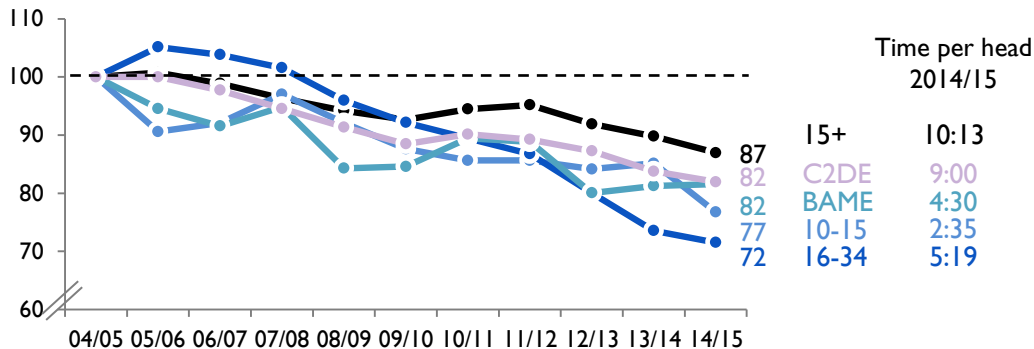
Total Radio average weekly time per head indexed on 2004/05



BBC TV average weekly time per head on TV set indexed on 2010/11



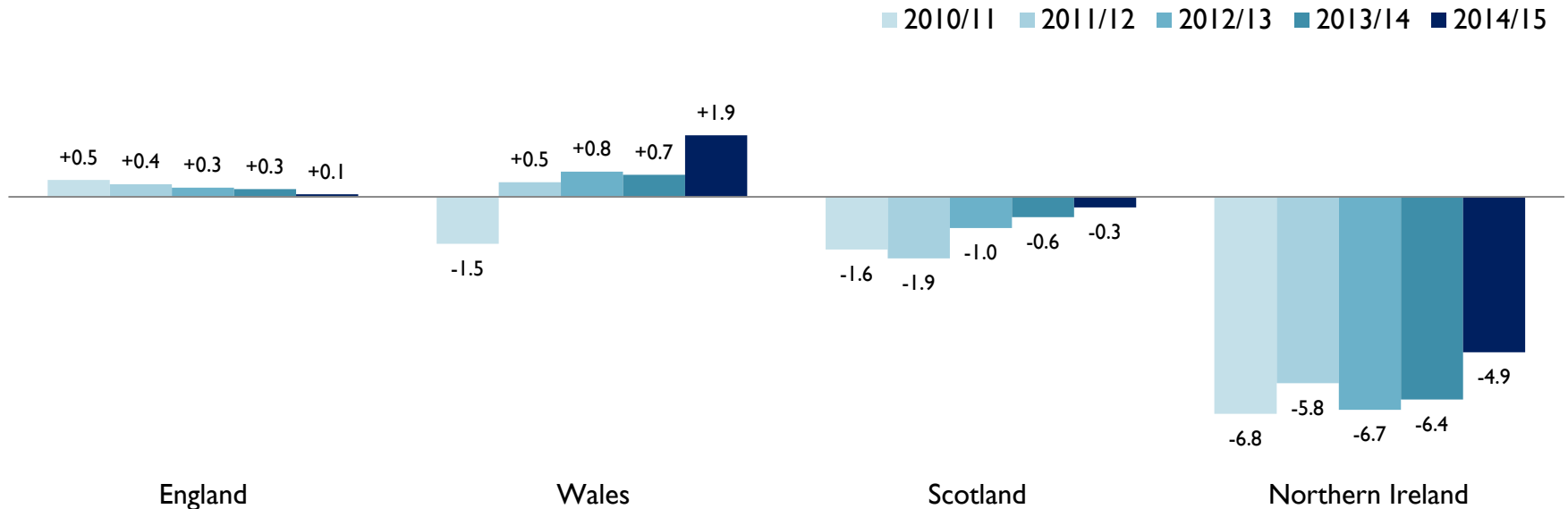
BBC Radio average weekly time per head indexed on 2004/05



BBC TV share in Scotland, Wales and Northern Ireland has moved closer to the UK average since 2010

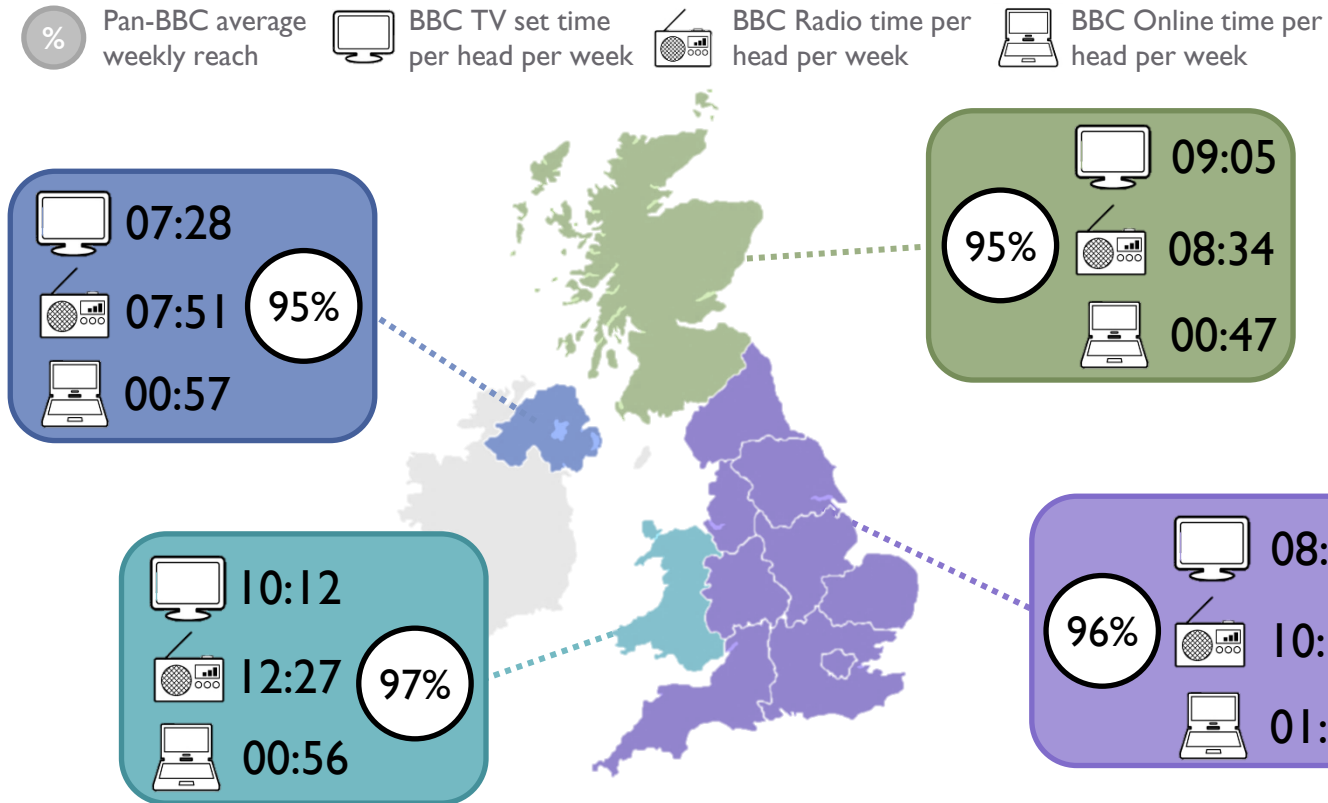
Nations and regions BBC TV share compared with the UK average

Chart shows share gap: BBC TV share in each nation/region minus BBC TV share in the UK overall



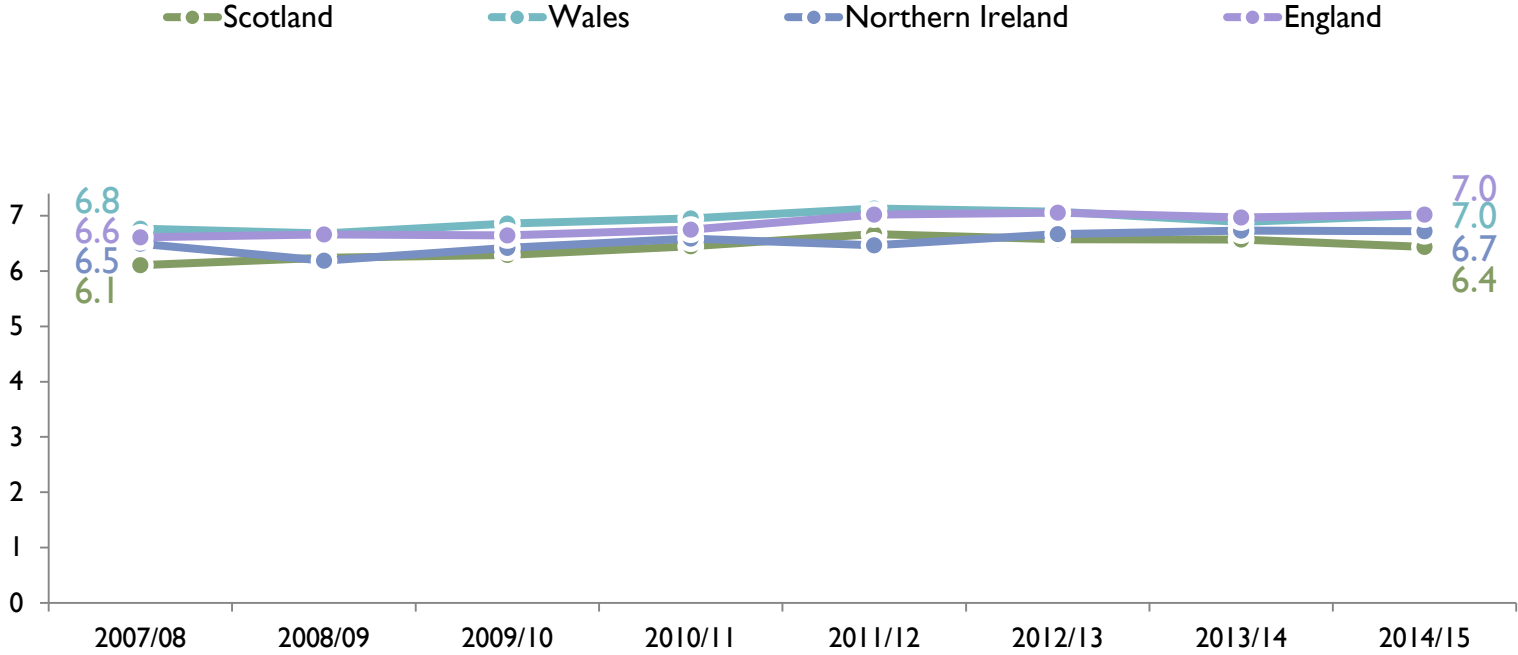
However, there are differences in BBC performance in the Nations

Almost all adults in each Nation use the BBC each week, though the amount of time differs



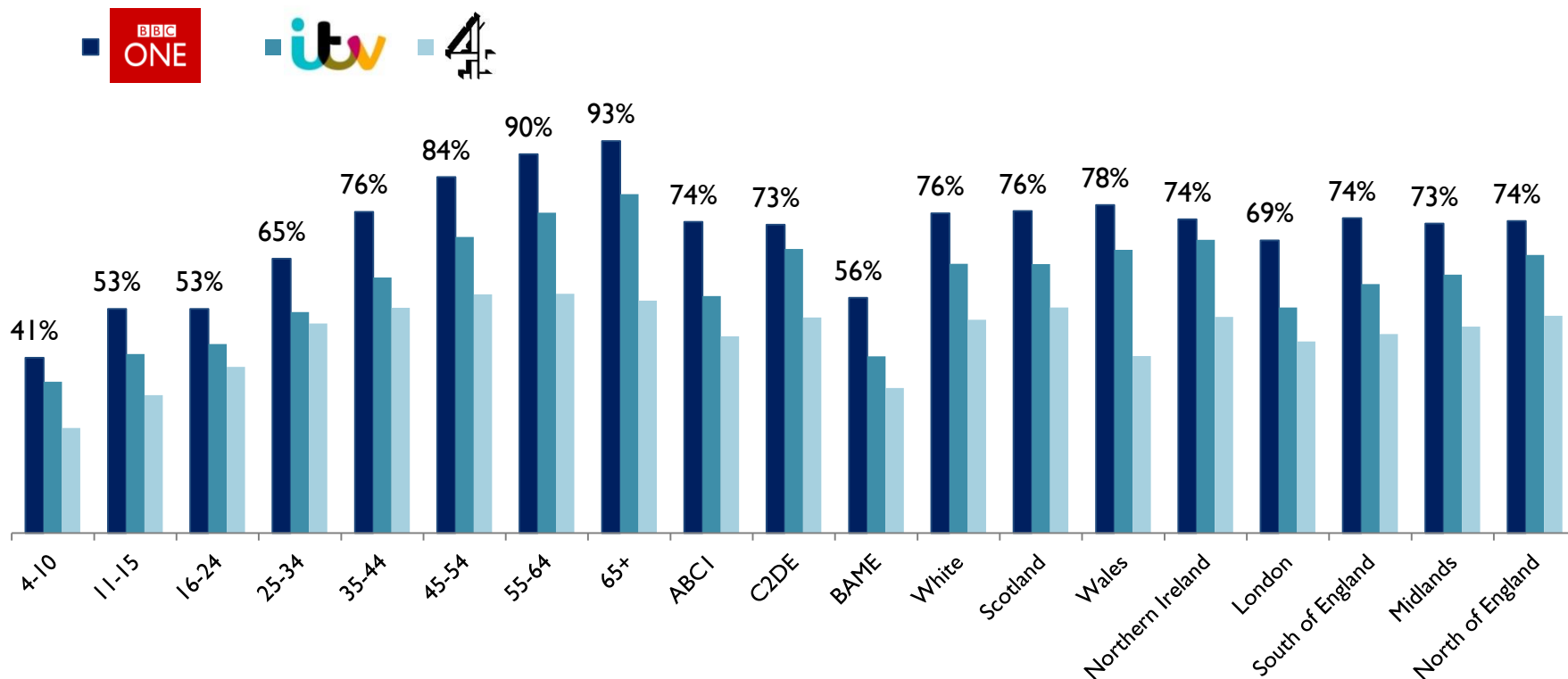
And perceptions also vary, especially over the last year in Scotland. An evolving UK means a greater need to reflect and represent all areas of the country

General impression of the BBC Mean score /10



Despite this change and diversity, BBC One is still the broadcast channel that reaches more people than any other per week in terms of age, area, socio-economic or ethnic group

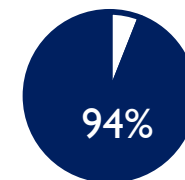
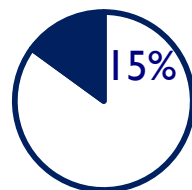
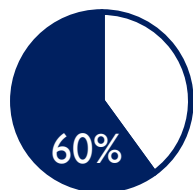
Average weekly reach of the channel on the TV set among each audience group %



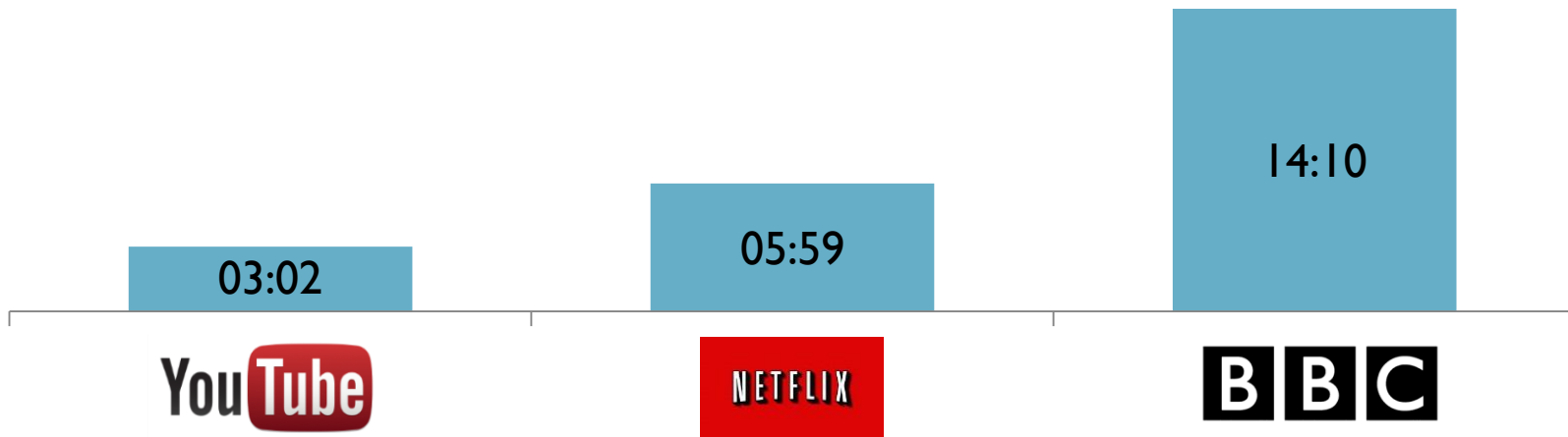
And while new competitors are growing, the BBC is still unrivalled in its ability to reach people every week, including young audiences

Reach and time per user among adults 16-24

Weekly reach %:



Weekly time per user:



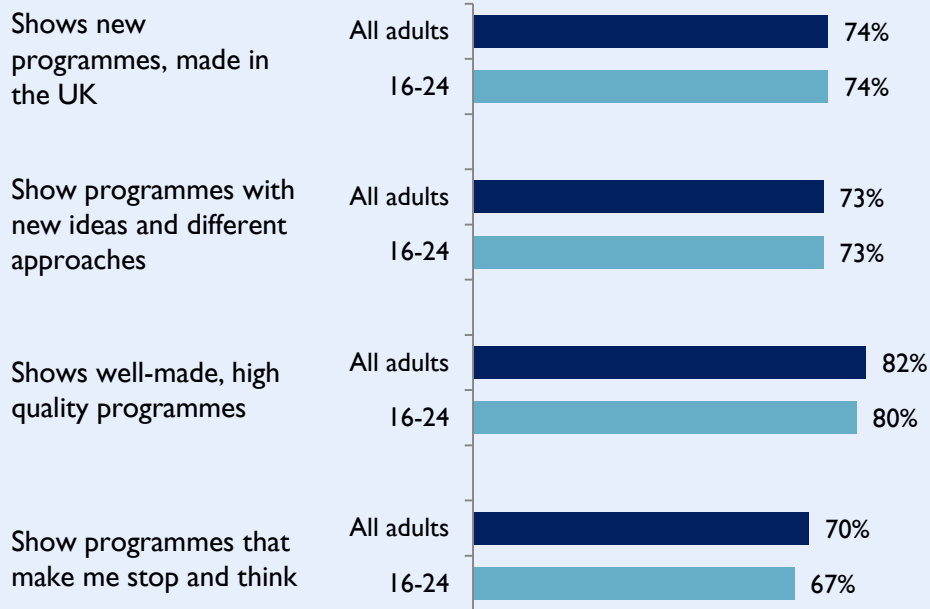
Audiences can now access easily the best global content. Top BBC titles are performing well against new providers and UK PSB content is very popular, including among young audiences

Appreciation scores among those watching at least one full series



The characteristics of public service broadcasting are just as important for young audiences

Importance of PSB characteristics
(selected, % rating seven or more out of ten)



End