BBC Trust

Audience Perceptions and Expectations of the BBC:

A summary of audience research commissioned on behalf of the BBC Trust

2007 – 2012

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1. Introduction

1.1 Background

The BBC Trust came into being with the current Royal Charter and Agreement in 2007. Its core mission is to get the best out of the BBC for licence fee payers. Whether that means protecting it from political interference and the pressure to become more commercial, or ensuring that the BBC continues to provide excellent value for money and stays true to its principles.

To fulfill this, Trustees must keep in close contact with licence fee payers, being aware of and understanding their expectations of the BBC. A primary route to achieving this is through specially commissioned research, comprising qualitative or quantitative approaches as appropriate, to explore and understand the audience view on specific issues. The audience perspective can be further enhanced through consultation and direct engagement with the public as well as through the work of the Audience Councils. This paper focuses primarily on the bespoke research we've commissioned, drawing together the key insights gained via this route since the Trust began in 2007. One of our major sources of insight is the Trust's Purpose Remit Survey, which is an annual survey looking at perceptions of how well the BBC as a whole is delivering the Public Purposes laid out its Charter.

The Trust has an obligation to review each of the BBC's services at least once every 5 years, and the first cycle is now complete and every service has been reviewed. The Trust has also recently published its conclusions on 'Delivering Quality First' (DQF), the BBC's strategy to deliver the savings required by the new licence fee settlement, which keeps the licence fee flat at its current level up to 2016/17 and brings new obligations for the BBC. The Trust's conclusions on DQF drew on research conducted across the 5 year period, including an overarching Trust project looking at all services, which was conducted in 2010 as part of the strategy review 'Putting Quality First'. These research projects form the main basis of the summary report. All the research referred to in the summary has previously been published in full, and further details are available on the BBC Trust website.

1.2 Approach to this summary

Research is commissioned as appropriate within Trust projects to provide the audience perspective on specific questions. As such, the research tends to be used to address tightly-defined questions or specific gaps within a project. Findings can then be used as necessary to influence a change of direction for a particular BBC service or activity.

In addition to exploring specific areas, there are a range of themes that emerge whenever we have a conversation with audiences about the BBC. These have been drawn together here alongside other key points concerning BBC services.

Where appropriate, research commissioned by the BBC Executive that has informed our worked is also referred to.

Note: In addition to the broad themes presented in this paper, our ongoing conversation with audiences has highlighted the fact that it can take some time for audience perceptions to shift or for associations or beliefs to be changed. An example of this is the fact that Jonathan Ross continued to be cited as a suggested example of overpaid talent by the BBC for some time after he had stopped appearing on BBC programmes.

2. The Audience View

2.1 Executive Summary

Audiences are glad the BBC exists and their primary wish for the BBC is that it should offer them great content. The quality and distinctiveness of what the BBC offers set it apart from other broadcasters. News is the most highly valued content, and drama and factual programming also dominate, in terms of what audiences expect the BBC to do and what they value most.

Much has changed particularly in the television landscape since 2007 when the Trust was set up. The growth in on-demand viewing including PVRs and the launch of the iPlayer (this was not available in 2007) has had an impact on viewing behaviour. Great programmes are more widespread and more accessible. Technology, content and viewing habits have all shifted noticeably but the BBC's position remains strong in terms of providing entertaining, stimulating content. Audiences still expect the BBC to be setting the benchmark in terms of quality whilst a demand for distinctive programming remains. There also remains a desire for the BBC to be less safe and to take more risks in its programming.

The BBC, as an organisation and through its content, is associated with many positive qualities such as trust, reliability, quality and authority. There is an expectation that the BBC should set the standard for other broadcasters, in terms of organisational values and editorial judgement.

There are mixed views about the licence fee, however over half of the public consistently agree that it offers them good value for money. Quality and range of programmes are the reasons why some feel it is good value. Licence fee funding is also seen to guarantee high quality programmes, a range of output and independence from commercial and political pressures. It is felt to guarantee that the BBC will be kept free of commercial advertising, which is something audiences value. Others feel however that the licence fee does not offer good value, perceiving it as an expensive compulsory payment (often on top of what they may pay for other TV services).

The licence fee brings with it some expectation of accountability from the BBC, although this does not mean that the majority of licence fee payers want to be active individual stakeholders of the BBC. Most people are happy to remain as 'consumers', however some feel that the BBC could do more to canvas their opinions and keep them informed.

Audiences also feel that the licence fee brings to the BBC a responsibility to reflect the diversity of its audience, providing something for everyone. There is variation in how different audience groups feel about the BBC, with some more positive than others. More authentic portrayal of different audiences continues to be an issue for audience groups across the UK, but most particularly in the nations.

Audiences are often surprised at the full range of services the BBC provides, as they tend to think first of the smaller range of services they themselves use regularly. Some people are broadly supportive of the notion of the BBC providing a diverse range of services, though there is also a feeling that perhaps some specialist output could be catered for within the mainstream services. However, users of the individual services tend to rate those services highly in our service reviews.

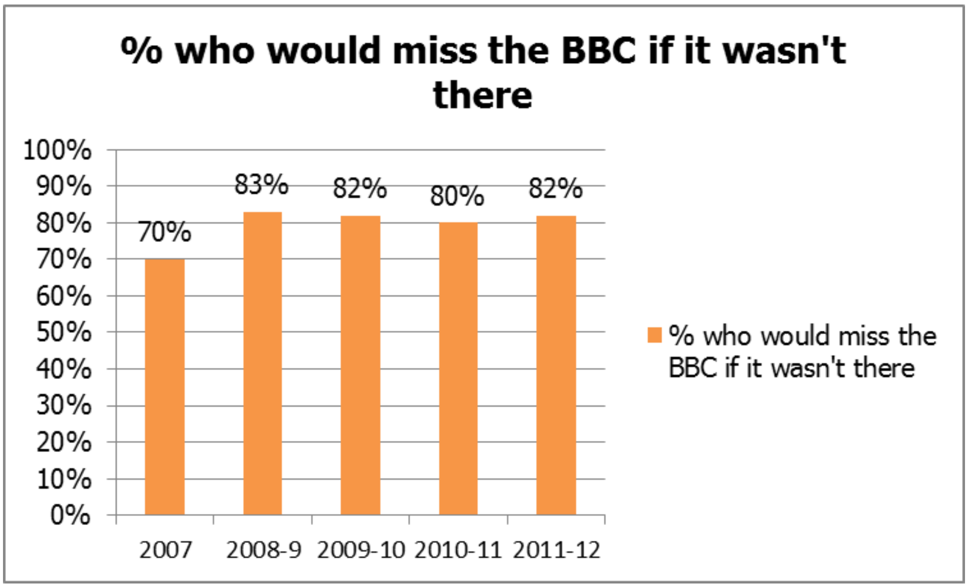
In an environment where savings need to be made, it is most important to audiences that the quality of BBC services is protected. It is also important that the BBC should be seen to do all it can to save money through efficiencies before any reductions in services are made. If this is necessary, then there is a strong sense that any reductions should be made in a way that as far as possible is fair to all viewers.

2.2 General attitudes towards the BBC

The BBC is valued

The audience is generally pleased to have the BBC and supportive of its role. Around eight in ten adults say that they 'would miss it if it wasn't there', and this proportion has remained relatively stable over the last few years, as shown in Figure 1.

Figure 1: Overall Perceptions of the BBC



Source: Purpose Remit Survey, Kantar Media

Audiences believe the core remit of the BBC should be to focus on information (news and weather), entertainment (particularly drama and comedy) and education (documentaries and other factual)[1]. The fact that the BBC is a commercial-free zone is also often spontaneously welcomed by audiences.

Content is king

Whenever we talk to audiences, be it about policy reviews, service evaluations, or assessing the public value of services, the overriding conclusion is what audiences care about most is programmes: content that they and their household want to watch and listen to. This is more important to people than, for example, how the BBC is run as an organisation or how content is delivered. The Creativity purpose has consistently been the Public Purpose with the strongest relationship with value for money and is therefore the area that is likely to have the greatest effect on overall perceptions of the BBC, should any improvements be made. Providing enjoyable and entertaining programmes remains the main priority driving

[1] Strategy Review – stage one (The Knowledge Agency, 2010)

perceptions of value for money and indeed, throughout the study, the audience cites the programmes they watch on the BBC as the reasons behind the scores they give on a number of different measures[2].

With the proliferation of channels and content and therefore choice, we have found that audiences under-estimate the amount of BBC television they consume. Conscious attribution to a particular channel or broadcaster has become increasingly difficult for audiences[3].

Setting the standards

Most audiences want the BBC to uphold higher standards than other media organisations, and many want the BBC to be a moral compass[4].

When people are asked to describe the BBC a number of consistently positive values are given: trust; reliability; quality; and authority. The way in which people talk about these definitions is inevitably through content, but research indicates that these qualities are also part of a strong underlying brand image and reputation, which underpins audience judgements about individual pieces of content[5].

Research commissioned by BBC management also shows that the majority of audiences agree that the BBC should make entertaining and challenging programmes which reflect society and strengthen the corporation's position as a viable broadcaster for future generations. They also expect it to do so in a more considered and responsible way than other broadcasters[6].

Quality and distinctiveness are key

Perceptions of the quality and range of programmes offered are closely linked to overall views of the BBC and praise or criticism of particular programmes (mostly on TV) are reasons often given for why the licence fee is good or bad value for money, respectively[7].

Distinctiveness as a concept is not particularly well understood by audiences and this together with the term 'fresh and new' can have many different meanings to audiences. Even subtle changes to favourite shows and/or genres can contribute to the sense that TV is not standing still and thereby still feels fresh and new. However audiences still expect the BBC to provide programming that is 'fresh and new' in a more substantial way[8].

Perceptions of quality are more subjective and individual, although there are some common characteristics attributed to quality and these vary by platform. For

[2] Purpose Remit Survey (Kantar Media, 2010-11)

[3] Distinctiveness research (Blinc, 2012)

[4] Researching the BBC's draft Editorial Guidelines with the UK public (Kantar Media, 2010)

[5] Audience Research for the Impartiality Review on the BBC's coverage of conflicts (Jigsaw Research, 2012)

[6] Taste and Standards: qualitative research (Blinc, 2009)

[7] Purpose Remit Survey (Kantar Media, 2010-11)

[8] Distinctiveness research (Blinc, 2012)

television, for example, production values, editorial integrity, setting moral standards, originality, talent, and in-depth research all contribute to impressions of quality. For radio, witty and intelligent presenters, high-profile names and interviews, dedication to new music, live music and exclusive sessions and appropriate news reporting all help drive perceptions of quality. For online content, accuracy, breadth and depth of information, being up-to-the-minute, good usability and navigation, and useful, supporting information to television programmes influence perceptions[9].

News dominates

The BBC is seen to deliver well on the public purposes relevant to areas that audiences identify as distinctive offerings from the BBC. In particular, its international news provision and high quality journalism are identified as important and being delivered well[10]. The BBC's reputation for news is considered by most audiences as unparalleled and is seen to be a central tenet of the BBC offering[11].

Drama and factual content also stand out

Audiences identify the BBC to be particularly strong in certain genres – including documentary and factual programming, and drama[12]. Audiences also believe the BBC should place more emphasis on UK originated comedy and drama, in order to provide an alternative to what is available from than other broadcasters[13].

A desire for more creative output

Our tracking research on the public purposes consistently indicates that audiences would like to see an improvement in the BBC's delivery of lots of fresh and new ideas. We regularly see this emerging as something that audiences see as important but one where the BBC is not perceived to be sufficiently offering[14].

Our 2012 qualitative research on Distinctiveness highlights the influence that a changing media context has on perceptions of whether programming is 'fresh and new'. Almost the entire country is now multi-channel and 50% of homes have personal video records or PVRs[15]. Online catch-up viewing, especially via BBC iPlayer and 4OD sits just behind PVRs in the normalisation trend. You can now watch TV on smart-phones or tablets or programme your PVR from these devices. In 2012 it is very difficult to miss the programmes or series you love. TV is now regarded as delivering high quality entertainment almost at our beck and call.

There is no shortage of great TV now and viewers feel they have much quality TV to choose from, whereas the scenario when we did qualitative research in 2007 was rather different. Previously repeats were an area of considerable concern for

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[9] Strategy Review – stage one (The Knowledge Agency, 2010)

[10] Purpose Remit Survey (Kantar Media, 2011-12)

[11] Strategy Review – stage one (The Knowledge Agency, 2010)

[12] Strategy Review – stage one (The Knowledge Agency, 2010)

[13] Strategy Review – stage one (The Knowledge Agency, 2010)

[14] Strategy Review – stage one (The Knowledge Agency, 2010)

[15] BARB Establishment Survey (2011 Q3)

the BBC, whether these were actual repeats of programmes or repeated use of formats and or spin-offs. In 2012 this perception is not nearly so strong, even though viewers understand they can watch repeats of BBC programmes on other channels (and sometimes choose to do so). "Repeat channels" are more often regarded as archives of their favourite shows rather than as a source of second-best TV. Audiences perceive that quality, original output from the BBC has improved since 2007 when concerns were raised that the corporation was trying to compete with commercial rivals with me-too shows. High quality programming is felt to be essential during peak time, and the BBC and other broadcasters are providing audiences with a range of choices at this time, but instead of having to make a choice they can simply record or catch up later[16].

Risk taking wanted but within reason

Although risk-taking is seen as important to audiences it has to be within certain responsible boundaries. For example, some audiences would like the BBC to take risks in developing new talent, originating drama, being bolder in providing difficult or challenging output and giving greater schedule prominence to this output.[17]

There is a clear sense of heritage with the BBC so there is a need for the BBC to balance risk-taking and the provision of new ideas with providing audiences content they are familiar with and value. Audiences expect their viewing choice to comprise mostly 'old favourites', with a few that are a slight twist on a familiar theme, and a few that are genuinely 'new' and groundbreaking[18].

In 2012 audiences still sometimes feel that the BBC can play it safe: some feel that the BBC could afford to be a little more controversial and subversive, others regard investment in long-form serious drama as taking more risks whilst other groups feel that BBC should reflect ethnic and social diversity across more of its output. Where audiences recognise that risks have been taken, there is acclaim for those programmes[19].

Perceptions of the BBC as a whole are often driven by the mainstream offer

Most people's TV viewing of the BBC is with the two main television channels so their perceptions are often based on the mainstream offering. For example, in our service review of BBC One, perceptions of the channel's performance against the Public Purposes were similar to their perceptions of the BBC as a whole. That is to say, if viewers had a positive opinion of BBC One, they were more likely to have a positive opinion of the BBC overall. Our strategy review research showed that knowledge and experience of the BBC's digital TV channels and some radio services was limited. When the full range of the BBC's television, radio and online services are shown to people, they are often surprised by its scale and scope[20].

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[16] Distinctiveness Research (Blinc, 2012)

[17] Television audience perceptions of innovation and distinctiveness (Blinc Research, 2007)

[18] Television audience perceptions of innovation and distinctiveness (Blinc Research, 2007)

[19] Distinctiveness Research (Blinc, 2012)

[20] Strategy Review – stage one (The Knowledge Agency, 2010)

In 2012, however, our qualitative research does indicate that there is increasing awareness of BBC Three and Four, especially Four via its social, science and particularly music documentaries. Certain audience groups see BBC Four as an important channel in the BBC TV portfolio[21] . Research for BBC management as part of the Delivering Quality First strategy also showed that for younger viewers, BBC Three was seen as the main service the BBC provides for them[22].

Responsibility to serve all audiences

Audiences acknowledge the importance of the BBC providing content that offers something of value to the whole population. This includes broadcasting major events where the role of the BBC is seen to be as a catalyst in bringing the nation together to facilitate a degree of social cohesion[23]. Representing the UK, its nations regions and communities is acknowledged as a key responsibility of the BBC given its unique funding. There is a perceived responsibility of the BBC to inform the public and reflect its diversity[24].

Some audience groups are generally more favourable towards and positive about the BBC than other groups[25].

- Across the overall measures, audiences in Scotland and Northern Ireland have, on average, lower scores than audiences in England and Wales. For example, in 2011-2012, adults in Northern Ireland (38%) and Scotland (40%) were less likely to be high approvers[26] of the BBC than adults in Wales (50%) and England (44%).

- Perceptions of the BBC have consistently tended to be more positive in the higher ABC1 social grades than the lower C2DE social grades whilst both ends of the age spectrum were more positive than the middle age bands. The audience aged 35-54 and in the C2DE social grade has generally been one of the most negative about the BBC.

- Adults in black and minority ethnic groups were consistently less likely to feel that the BBC is good value for money than adults from a white background and they have consistently been less likely to miss the BBC than white audiences (76% vs. 83% in 2011-12). However, there was no difference in overall impression by ethnicity when comparing white (44%) and black and minority ethnic audiences (41%) in 2011-2012.

More authentic portrayal of different audiences

As with all opinions about BBC content, portrayal is a subjective issue and is dependent on how people identify themselves and also on the amount and type of BBC content they consume. In terms of providing niche services catering for

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[21] Distinctiveness Research (Blinc, 2012)

[22] Audience perceptions of the BBC's Delivery Quality First proposals (Ipsos-MORI, 2011)

[23] Strategy Review – stage one (The Knowledge Agency, 2010)

[24] Research Informing the development of the BBC's Diversity Strategy (TWResearch, 2011)

[25] Purpose Remit Survey (Kantar Media, 2011/12)

[26] High approvers are those who give the BBC an overall impression score of 8 to 10 on a 10 point scale.

specific cultural groups, audiences tend to believe that the BBC should serve these audiences as part of the mainstream offer rather than bespoke channels[27].

The latest wave of the Trust's Purpose Remit survey shows that portrayal continues to be an issue for audiences, most particularly in the nations. There has consistently been a underperformance on the priority 'the BBC is good at portraying my nation/region to other people in the UK', but in 2011/12 performance scores fell from 45% to 40% who felt the BBC was doing well on this priority. At the same time, the proportion of people who felt it was important for the BBC to do this actually grew. This discrepancy between performance and importance scores is known in the survey as a performance gap. There have also consistently been larger negative performance gaps than average for people from black and minority ethnic backgrounds when it comes to the BBC's portrayal of their culture and community. On the other hand, positive performance gaps have been consistently recorded for the priority 'the BBC reflects a range of religious and other beliefs'.

Concerns in terms of representation and portrayal include raising awareness and understanding of some audience groups, balanced against over-representing these groups, and also avoiding stereotypical portrayals. There is an appreciation that negative as well as positive portrayal has a role to play in media content as this reflects reality, but concerns emerge around the issue of balance. There is also a desire to see more positive portrayal in order to provide a more authentic overview of a characteristic and to help address negative perceptions or prejudice in society[28]. For example, the BBC's research into age portrayal found a desire for more balanced, positive and accurate portrayal of all age groups – but specifically younger and older people. Participants in this research also called for greater visibility of middle and older aged women who were felt to be missing from the screen[29].

[27] Strategy Review – stage one (The Knowledge Agency, 2010)

[28] Research Informing the development of the BBC's Diversity Strategy (TWResearch, 2011)

[29] Serving All Ages (NatCen, 2012)

The licence fee provokes mixed views

Figure 2: Value for money

Source: Purpose Remit Survey, Kantar Media

Just over half of UK adults agree that their household gets good value for money from the licence fee. This figure has remained consistent throughout the period in which the Trust has been tracking it (since 2007)[30] as illustrated in Figure 1. Those who think they get good value cite the quality and range of programmes as reasons for this. For those who don't feel they get good value, funding is the primary factor, and reasons include it being too expensive, an enforced payment and an additional payment on top of their existing digital television subscription charges[31].

The licence fee often comes under scrutiny and conversations with the audience on any aspect of the BBC can often provoke spontaneous objections to paying it with a few voicing the opinion they would consider opting out if this was ever offered to them[32]. On the other hand, participants in focus groups have also expressed the view that the licence fee funding mechanism guarantees many facets of the BBC that participants valued: high quality programmes, a range of output (something for everyone) and independence from commercial and political pressures. It is also felt to guarantee that the BBC will be kept free of commercial advertising[33].

While licence fee funding brings expectations in terms of the BBC being accountable to licence fee payers, this does not directly translate into a sense of having an individual stakeholder relationship with the BBC - most are happy to remain as consumers. However, some feel that the BBC could do more to canvas

[30] Purpose Remit Survey (Kantar Media 2007 - 2012)

[31] Purpose Remit Survey (Kantar Media)

[32] Strategy Review – stage one (The Knowledge Agency, 2010)

[33] Audience attitudes to the licence fee and PSB provision beyond the BBC (Human Capital, 2008)

their opinions and keep them informed. Our research has shown low awareness of published information about how the licence fee is spent, for example, or of ways of contacting the BBC[34]. Research shows that most people understand there is a link between the licence fee and the BBC. In research conducted in 2008, when asked unprompted which broadcaster(s) the licence fee funds, a majority of respondents (70%) spontaneously identified that the licence fee funds the BBC. This increased to 86% when respondents were presented with a list of broadcasters to choose from.

However, there were varying degrees of knowledge about exactly what the licence fee pays for. When prompted with a list of specific services, the majority of people were aware that BBC One and Two are funded by the licence fee (86%); around seven in ten identified at least one of the BBC's digital TV channels; and just over half mentioned BBC radio or BBC online. Where respondents were regular users of the service, awareness was higher still that the licence fee paid for these services[35].

It appears that there may be a degree of disassociation between audience perceptions of the BBC's content and the funding mechanism. When people are asked to talk about the BBC they spontaneously rate it in terms of what they consume first and foremost.

When they are asked to rate the BBC in terms of the value for money they receive from their payment (which they are told is used to fund a variety of services), they weigh up what they remember consuming from the BBC, what they pay and what media they consume from elsewhere.

2.3 Priorities for the BBC, in light of the current licence fee settlement

Different modes of thinking for licence fee payers are also reflected in the BBC Executive's research on the package of proposals known as 'Delivery Quality First' which was designed to deliver savings required by the new licence fee settlement, which keeps the licence fee flat at its current level up to 2016/17 while giving the BBC new responsibilities to fund.

In this research, most participants responded to the proposals as 'consumers' (i.e. viewers/listeners of the services) and cared particularly about the perceived impact of the proposals on the content and services that they used. A few thought about the proposals as 'citizens' (i.e. thinking about the wider impact on society) and expressed some concerns about the impact of some of the proposals on other groups of people or on their own national or regional identity.

Most participants felt it was important for the BBC to protect both 'popular' and 'niche' services because of its remit. They struggled to resolve this potential tension as both were seen to be important for different reasons.

[34] Audience attitudes to the licence fee and PSB provision beyond the BBC (Human Capital, 2008)

[35] Audience attitudes to the licence fee and PSB provision beyond the BBC (Human Capital, 2008)

In making decisions about savings, participants first wanted reassurance that the BBC has taken significant steps to control costs before making reductions to content and services. Then, where reductions to BBC output had to be made, participants wanted the changes to be made in such a way that they feel they are fair and maintain the quality of BBC content. Fairness was the most important criteria. Participants wanted any reductions to be fair to all viewers, particularly to themselves and people like them, as well as being fair across audience groups and also to be fair between services. The BBC was felt to be different from other broadcasters, with the quality of content being what they particularly valued from the BBC. To this end, they wanted to ensure that the quality of BBC output was protected[36].

2.4 Attitudes towards BBC services

As part of the Trust's rolling programme of service reviews, research is used to understand the audience perceptions of how well each BBC service is fulfilling its remit. This work is the primary source for this section as the Trust has now completed reviews of every service in the last 5 years. Where relevant, we have also drawn on findings from other pieces of work that have considered the wider BBC portfolio. In particular the research commissioned in 2010 as part of the Strategy Review which considered the full range of services.

2.4.1 Television

BBC One is seen by audiences as the flagship channel and where the more populist programmes are expected to appear as well as the main news programmes[37]. Viewers recognise BBC One's strengths in delivering elements of the BBC's creativity purpose by providing a range of content people find enjoyable and entertaining, and also is considered strong in bringing viewers together for major events[38]. Audiences accept, and want, the BBC as a whole to show programming across the full range of genres, including popular entertainment, as long as it takes a fresh approach and resonates with the BBC's values in content, tone and execution[39].

BBC Two was seen in our service review research as making a strong contribution to the public purposes[40]. The research we conducted as part of the strategy review in 2010 showed that while BBC Two was less well-defined by audiences it was generally perceived to be the home of more intellectual programming including factual output. Some associated it with comedy, while others saw it as the home of ancillary programmes to some BBC One output. Overall, it was seen as having a less distinct identity, being a hybrid of serious and experimental

[36] Audience perceptions of the BBC's Delivery Quality First proposals (Ipsos-MORI, 2011)

[37] Strategy Review – stage one (The Knowledge Agency, 2010)

[38] Service Review of BBC One, BBC Two and Four (Kantar Media, 2009)

[39] Television audience perceptions of innovation and distinctiveness (Blinc Research, 2007)

[40] Service Review of BBC One, BBC Two and BBC Four (Kantar Media, 2009)

programming.[41] These findings were reflected in the Trust's review of BBC Two and BBC management has already started to implement changes with the aim of shifting these perceptions.

BBC Three: In our research for the strategy review in 2010 awareness of the full television portfolio was limited, but those who did have an opinion on the digital television services broadly see BBC Three as the home of repeats of BBC One or Two programmes such as *Eastenders* and *Doctor Who,* as well as providing some innovative programming for younger audiences. In terms of repeats there is often a view that BBC Three could also offer repeat viewings of a wider offering, especially the more popular, 'must see' programmes[42] Research for BBC management as part of the Delivering Quality First strategy showed that BBC Three was also valued for its role in developing new talent, for its innovation, and for younger viewers was seen as the main service the BBC provides for them[43].

BBC Four is less well-known and its remit is less well understood than the other major channels in the portfolio. When the remit is shared with audiences, some compare it with their perceptions of BBC Two and to others it appears as too serious for them. However, our research showed a core of loyal viewers who absolutely adored the channel[44]. Our service review research showed us that viewers to the channel feel it often provides something original and different from other BBC television channels in terms of degree of depth and specialism. We found that the channel was meeting audience expectations of its delivery of the public purposes, with particular strengths in the creativity, education and global purposes[45].

Some audiences have raised the question of whether the BBC needs to offer four mixed-genre channels. The most common suggestion in the Trust's 2010 research was to combine BBC Two and Four which would then provide factual and more 'intellectual' programming, with BBC One remaining as the core mainstream channel, and BBC Three continuing to focus on innovative programming for younger audiences. The part-time nature of the two digital services was seen as further argument for this change[46].

The CBBC and CBeebies channels are highly valued by their viewers, including parents and children alike. Each channel is seen to deliver well on the BBC's public purposes and provide distinctive UK originated content for children in a competitive marketplace[47].

[41] Strategy Review – stage one (The Knowledge Agency, 2010)

[42] Strategy Review – stage one (The Knowledge Agency, 2010)

[43] Audience perceptions of the BBC's Delivery Quality First proposals (Ipsos-MORI, 2011)

[44] Strategy Review – stage one (The Knowledge Agency, 2010)

[45] Service Review of BBC One, BBC Two and BBC Four (Kantar Media, 2009)

[46] Strategy Review – stage one (The Knowledge Agency, 2010)

[47] Service Review of Children's Services (Andrew Irving Associates & Pulse, 2008)

The BBC News Channel meets a number of audience needs, offering access to TV news whenever it suits you, as well as being the place to turn to when there is a major news event. In a changing media environment, while speed of delivery is important, TV news is rarely felt to 'break' a story. Most often it gives confirmation and adds detail to headlines which audiences have first come across elsewhere. The image of the News Channel is very closely aligned with the BBC News brand and it is seen as delivering authority, gravitas and trust. The channel is seen as setting a quality standard for rolling news[48].

BBC Parliament has a niche audience who value it very highly for the unmediated access it delivers to democratic proceedings. It appeals to those with a professional and a personal interest in the workings of democracy. For viewers it delivers on the BBC's Citizenship purpose by making politicians more accountable to the public and enhancing public understanding of political processes. It also encourages media literacy and is considered extremely impartial, because of the complete lack of editorial intervention in the majority of its coverage[49].

BBC Alba: Research commissioned by the BBC Executive has shown that the Gaelic-speaking population have welcomed BBC ALBA, particularly the quality and variety of the BBC ALBA offering[50].

BBC HD: We commissioned audience research as part of the Trust's public value test of BBC HD in 2007. The findings told us that the audience were broadly supportive of the BBC providing a high definition offer, and the Trust approved the launch of the BBC HD channel. Subsequently, the BBC also launched a simulcast of BBC One in high definition in 2010. Following the Trust's approval of the *Delivery Quality First* proposals, the BBC will provide a simulcast version of BBC Two in HD, and the BBC HD channel will be closed in 2013[51].

Red Button: Our research as part of the service review revealed that BBC Red Button is perceived by current users to make a useful contribution to the BBC's public services in some areas. Users believe that BBC Red Button is good at introducing people to the benefits of digital technology, and fulfilling the BBC's citizenship and global purposes through the provision of high quality independent news. The service is seen to contribute to the BBC's nations and regions purpose by providing the opportunity to share experiences with others around the UK through its coverage of live events[52.] The BBC Executive's research for Delivering Quality First indicated that proposals to standardise the BBC Red Button service across television platforms (by reducing streams for some users) were relatively uncontroversial for audiences[53].

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48 Service Review of BBC News and BBC Parliament (TW Research), March 2012

49 Service Review of BBC News and BBC Parliament (TW Research), March 2012

50 BBC Alba review, (Lersinn, 2010)

51 Public Value Test, BBC HD (BMRB Media), 2007

52 Service Review of BBC Red Button (Kantar Media), 2010

53 Audience perceptions of the BBC's Delivery Quality First proposals (Ipsos-MORI, 2011)

2.4.2 Radio

BBC Radio is highly valued by audiences. Our strategy review research showed that listeners value their station over commercial alternatives more highly than they value BBC television and feel they have a much closer relationship with it, often listening for several hours per day. For many respondents, it would be BBC radio that many say they would miss the most if it wasn't there[54], even though our analysis shows that it is BBC One which is most closely associated with overall perceptions of the BBC.

However, as with the television portfolio, awareness of the full range of stations and programmes BBC radio offers is often limited to what people choose to listen to. Some people are broadly supportive of the notion of the BBC providing a diverse range of services though there is also a strong feeling that there are too many stations and that perhaps some specialist output could be catered for within the mainstream stations. That said, listeners to those specialist services disagree [55].

Radio 1 is often praised by listeners for championing new music and new artists as well as supporting the UK's music industry. Its live music and events are also highlighted by some as distinctive offerings by the station[56]. BBC management's YouGov research, commissioned to inform our service review, also shows that audience perceptions that Radio 1 'plays a wide variety of new bands and new music' and 'covers a good range of live music and events' were high and significantly better than for comparable commercial radio stations[57].

1Xtra listeners are positive about the quality of its output, particularly its range of music. BBC management's YouGov research showed that audience perceptions that 1Xtra 'plays a wide variety of new black music' were better than for comparable commercial radio stations[58].

Radio 2 is also celebrated for its contribution to music and, as with Radio 1, is seen to do a very good job of providing an appealing combination of music and speech to its listeners. The presenters are also valued by listeners and are seen as high calibre[59]. Research we commissioned as part of the service review demonstrated the distinctiveness of the station among Radio 2 listeners with 80% agreeing that Radio 2 offers something that could not easily be replaced by any other station[60].

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[54] Strategy Review – stage one (The Knowledge Agency, 2010)

[55] Strategy Review – stage one (The Knowledge Agency, 2010)

[56] Strategy Review – stage one (The Knowledge Agency, 2010)

[57] Younger Audiences Service Review (YouGov, 2009)

[58] Younger Audiences Service Review (YouGov, 2009)

[59] Strategy Review – stage one (The Knowledge Agency, 2010)

[60] Service Review of BBC Radio 2 and 6 Music, (BMRB Media 2010)

Radio 3: Listeners feel it is a key source for classical music and provides a credible destination for highly creative and cultured music. It is also positioned by listeners as delivering strongly for ongoing learning. In particular, the lack of intrusions to the music (i.e. from discussion, news and advertising) and the richness and depth of information provided around the music on artists and composers creates unique value for the station, which is strongly appreciated by its core audience. Relative to Classic FM, Radio 3 is perceived as more intellectual but also less accessible. Whilst this intellectualism is regarded as strength for core audiences, it is seen to reduce the station's ability to engage lighter and potential new listeners[61].

Radio 4 listeners described it as offering a distinct and unique service in terms of both its schedule and overall tone. The station's news and current affairs output is particularly highly valued and seen as playing a central role in delivery against the purposes. Quality perceptions for Radio 4 are particularly high, and are driven by presenters (described as knowledgeable, passionate, intelligent, accessible) and programming (variety and depth), as well as high production standards and a serious, intelligent and challenging tone[62.]

Radio 4 Extra (formerly BBC Radio 7) is seen as having a distinct identity and is highly valued by its listeners. Engagement with the station varies across audiences, with younger listeners claiming to be discovering 'classic' content for the first time through to older audiences enjoying the nostalgic output[63].

Radio 5 live is seen by audiences as being knowledgeable and good at keeping them up to date. Its news output is seen as offering more intelligence and a greater depth than most of the alternatives, without being as formal and heavy going as Radio 4. Sports coverage is seen as offering an unrivalled breadth, depth and quality and this is the main driver of distinctiveness for the station. Participation and interaction are also valued elements of the station[64].

Radio 5 live Sports Extra is valued by audiences for its additional high quality coverage of a range of sporting events. In research we conducted in the service review, the majority of listeners perceived Sports Extra's role as being a complement to 5 live, although some expressed frustration that it was a missed opportunity for the BBC to provide a greater level of depth and breadth of sports coverage[65].

6 Music: Although awareness of the BBC's digital radio services was very low at the time of its service review at the start of 2010, 6 Music had a boost as a result of the strategy review proposals. Research we conducted as part of the strategy review showed that it is viewed as fundamentally different to other radio stations,

[61] Service Review of BBC Radio 3, 4 and 7 (Optimsa Research, 2010)

[62] Service Review of BBC Radio 3, 4 and 7 (Optimsa Research, 2010)

[63] Service Review of BBC Radio 3, 4 and 7 (Optimsa Research, 2010)

[64] Service Review of BBC Radio 5 live and Sports Extra (Kantar Media and The Knowledge Agency, 2012)

[65] Service Review of BBC Radio 5 live and Sports Extra (Kantar Media and The Knowledge Agency, 2012)

and listeners appreciate the stations commitment to credible, high quality music[66]. Like Radio 2, the majority of 6 Music listeners think the station is distinctive. Some 82% of listeners we surveyed as part of the service review believe that the service offers something which could not easily be replaced by another station[67].

BBC Asian Network listeners feel the station serves British Asians well, and delivers the BBC's public purposes to an audience who may be less well served by other BBC output. It keeps British Asians in touch with their ethnic roots and connects them with other cultures. The most valued elements of output are a wide range of music, informative and culturally relevant discussion programmes, and the station's role in promoting the British Asian music scene through playlists and live events. The public consultation shows that some non-listeners however do not support the need for a specific station for British Asians[68].

BBC Local Radio: The service review showed that the English local radio services offered a service that is distinctive and the stations were rated highly in terms of overall listener impressions and quality/impact measures. Many listeners had a strong emotional attachment to BBC Local Radio, and that its local focus was perceived to be both a core strength and differentiator. In addition, listeners identified the friendly and informal tone, and opportunities provided for listener involvement, as key positives[69]. Research for the Public Value Test for Local Video in 2008 also touched on perceptions of what 'local' means to people, and concluded that this evolves constantly and often depends on the subject in question. We also know that it can vary depending on where people live: in rural areas, local issues and news from neighbouring areas can be as relevant as news from their immediate community; in urban areas, people often describe their 'local' areas of interest as where they live and also where they work. This research also showed that local radio is seen as an accessible and instant medium which is useful for 'up to the minute' local news that other media cannot provide as easily, such as traffic, weather and breaking news[70].

BBC Nations Radio: As the BBC's national radio stations in Northern Ireland, Scotland and Wales operate in very different cultural, social and political environments, we found that listener numbers and audience perceptions of quality vary between stations. However, each service offers licence fee payers something which is not available elsewhere:

Radio Scotland brings a large number of listeners to the BBC portfolio in Scotland providing listeners with Scottish culture and a national perspective on local, national, UK and international affairs; BBC Radio Scotland performed well across measures of quality and impact with eight in ten listeners agreeing that "BBC

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[66] Strategy Review – stage one (The Knowledge Agency, 2010)

[67] Service Review, (BMRB Media, 2010)

[68] Service Review Of BBC Asian Network, (Ethnic Dimension, May 2012)

[69] Service Review of BBC Local Radio (Jigsaw Research, 2012)

[70] Public Value Test for Local Video (Rosenblatt, 2008)

Radio Scotland has programmes I want to listen to" and "BBC Radio Scotland has well-made high quality programmes".

Radio nan Gàidheal is highly appreciated by its audience and the vast majority agree it has well-made high quality programmes. Listeners believe that the station makes an important contribution to the public purposes, particularly through its support for Gaelic language and culture.

Radio Wales's listeners value the station's coverage of news and topical issues in Wales. BBC Radio Wales listeners generally felt positive about the station. The majority had a favourable overall impression of the station, the proportion who 'would miss' BBC Radio Wales was high at 82% and almost all listeners (97%) perceived it to be good value for money based on its share of the licence fee.

Radio Cymru makes an important contribution to the BBC's public purposes and, as the sole provider of nationally focused Welsh language content on the radio, the station offers a service which cannot be found elsewhere.

Radio Ulster/Foyle is the most listened to radio station in Northern Ireland and audience perceptions of quality are high. BBC Radio Ulster/Foyle listeners generally felt positive about the station and it performed well across measures of quality and impact with eight in ten listeners agreeing that "BBC Radio Ulster/Foyle has programmes I want to listen to". [71]

2.4.3 Online

The BBC's online offering, in particular the news and sport sites and the iPlayer, are consistently praised and seen to be leaders in their fields.

As well as usability being a key strength, the news sites are for many the first port of call for any breaking story. The site is praised for offering a wealth of information and for being trustworthy – especially among those with children. The breadth of information it covers leads it to be seen as a 'one-stop shop' for informative and educational content[72].

The iPlayer is celebrated by users in particular for its innovation and usability relative to other providers[73]. It is seen as a symbol of the BBC adapting its services to meet the evolving needs of its consumer base. Our research as part of the Strategy Review, however, did reveal some frustrations with iPlayer. Most commonly, these surrounded the seven day limit on availability of most

[71] Service Review of BBC Nations Radio (Kantar Media (Scotland, Wales, Cymru, Ulster/Foyle) Leirsinn (nan Gaidheal) 2011)

[72] Service review of bbc.co.uk(Sparkler, 2007)

[73] Strategy Review – stage one (The Knowledge Agency, 2010)

programmes (and, less commonly, the 30-day limit on downloaded content). There were also criticisms from some quarters of the inability to record and keep programmes streamed from the iPlayer, which was seen as comparing poorly to Sky+, for example[74].

[74] Strategy Review – stage two (The Knowledge Agency, 2010)

Annex 1: Complete list of sources

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